



Bringing **all** citizens on the digital journey

PwC Australia's
Citizen Survey 2022



pwc.com.au/citizensurvey2022



Executive summary

Citizen expectations of government are high and, while much has been achieved in the past few years to improve service delivery, particularly digital, there is always more to do and more to gain. Our survey found that citizens are less likely to agree that Australian government institutions are exceeding expectations than they were 18 months ago (22%, down from 30% in June 2020). But the very fact that citizens know what they want presents a huge opportunity for governments to satisfy them.

Governments are heading in the right direction when it comes to meeting citizens' needs. Our survey findings show they can maintain this trajectory by promoting engagement, supporting digital inclusion and, ultimately, fostering trust.

In particular, our survey revealed:

- Citizens have shown they want to actively engage with governments. Citizens who give feedback have significantly higher overall trust in government institutions, as do citizens who receive a response from government outlining 'next steps'.
- Government digital investment is paying off. Efforts to digitise services are having a positive impact on citizens' experiences and their sense of connectedness. Again, this is fostering trust and more can be done to bring all citizens along on the digital journey.
- Channel overload and navigation issues vary according to demographic and can be addressed by consolidating digital offerings and managing hyper-localisation to create a seamless digital ecosystem.



About our research

This report draws on 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, twice in 2020 (June and October), and then again in January 2022, providing a barometer for citizen sentiment before, and during, the COVID-19 pandemic. Some of the key findings are summarised in this report, where we compare the shift between June 2020 and now.



At a glance...

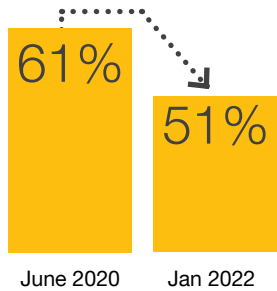
A nationally representative sample of

3,800+ Australian citizens

aged 18+ were surveyed across two pulse checks; in June 2020 and January 2022.

A Tipping Point

Australians who agree 'I continue to be optimistic about the future':

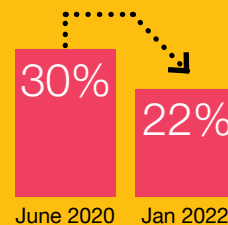


Engagement is an opportunity to build trust

70%

of Australians want to engage in the development of Federal services ranging from **access to information** to the **opportunity to contribute**.

It's tougher for government to exceed expectations; Australians who believe government is exceeding expectations:



37%

of Australians say mental wellbeing has been negatively impacted by lack of in person interactions and it's worse than before (**from 29% in June 2020**).

Overall trust in Government is significantly higher amongst those who ...



... give feedback

46%

... and higher again for those who received a response with information.

62%

Progress on digital inclusion

43%

of Australians agree that digital services have helped them **feel connected**.

30%

feel left behind in this new tech savvy world (up from 26% in June 2020).

36%

of Australians agree that their experience of government online services has **positively impacted their trust** in government.

However

A need to consolidate and simplify

40%
June 2020

Australians who believe the **increased range of channels** makes the process of accessing government services **more confusing** than ever before:

46%
Jan 2022

39%

of self-employed/business owners say government services are difficult to navigate (significantly higher than scores for the general population).





What citizens want: Why engagement and responsiveness top the list

Citizens are seeking responsiveness from government – and their expectations are high. When it comes to using government services, 81% of citizens expect to resolve requests in one interaction. Meanwhile, more than 85% of citizens say that speed, simplicity, convenience, transparency and security are important. Citizen engagement is also high right now. More people have interacted with a federal or state government service in the past three months than compared to June 2020.

Citizens are not passive; they've shown they want to be actively involved. For instance, 23% have provided feedback to government services in the past 12 months (whether completing a survey, providing complaints or compliments, or initiating contact to provide a point of view or offer input). This is substantially higher among those aged 25-34 years (32%), and those of Aboriginal and Torres Strait Islander origin (62%).

In the same vein, citizens want to be kept in the loop when it comes to government plans. Overall, 70% of Australians want to engage in the development of government services. One in five citizens wants to be personally informed of service development plans and progress; and one in three wants the ability to access information if desired. This holds across federal, state and local governments.

Here lies a key to building trust.

Citizens who give feedback report significantly higher overall trust in government institutions. Those who receive a response which outlines the next steps government will take also report significantly higher overall trust, demonstrating the importance not just of giving feedback, but of explaining the 'why' and 'what next' of a situation.



Ratchet up responsiveness

Governments have progressed towards integrating real-time feedback with 'have your say' initiatives, however, the challenge is: How to constantly find the capacity to provide timely and informative responses to citizens?

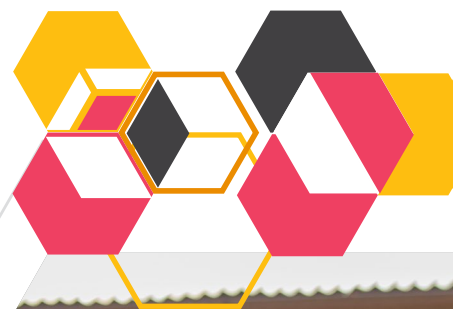
There's an opportunity to better use the knowledge and capability that exists within government systems to increase engagement and responsiveness. In short, to meet or exceed citizens' expectations.

Practically speaking, governments can:

- Foster an ecosystem where people can share their views and connect on key topics, to aid peer-to-peer engagement and support.
- Leverage the private network (e.g. accountants, lawyers) to help with responsiveness.
- Use business rules and artificial intelligence to support a more efficient response to feedback (e.g. generating tailored autoreplies that give updates to customers based on key topics).
- Mine data for feedback trends and move towards more proactive servicing; curating information to meet customers' needs as themes arise.
- Embed 'feedback by design', to build feedback as a mechanism into the design of services to support continuous refinement and improvement.



Digital channels are boosting inclusion and trust, but there's more to do



It's no surprise that the use of digital services has increased significantly in the past 18 months, particularly in NSW and Victoria, and especially in metropolitan regions, where around 45% of citizens report an increase in use of digital channels.

The headline news is that the government's digital investment is starting to pay off. More than one in three respondents (36%) agree that government institutions are proactive in digitising services and processes (compared to only 16% who disagree) and, more importantly, that their experience of government online services has positively impacted their trust in government institutions (again, 36%).

COVIDsafe check-in experiences appear to have had a positive effect, and government efforts to digitise services are improving system experiences. Almost half the respondents (48%) agree that digitisation of COVID-19 vaccination certificates has positively impacted their perceptions of government

services. Citizens' digital experiences with government institutions are generally good – driving trust, fostering inclusion and effectively demonstrating proactive initiatives of government.

Crucially, digital services are making many people feel connected. At a time when people are feeling more isolated than ever, 43% of people agree that digital services have helped them feel connected.

However, there's still a way to go as digital progress appears to be slower in regional areas. While use of digital channels has increased among residents of regional Australia, the rate of uptake is slower than for metropolitan areas (34% report increased use in regional areas, compared to 43% in metropolitan areas). Only 14% say their digital experiences have been better compared to pre-COVID conditions (versus 23% for metropolitan residents). Consequently, fewer regional residents say digital services make them feel connected, and fewer say

their online experiences have positively impacted their trust in government.

Overall, data security must remain a priority and citizens need to have confidence in the security measures taken. Citizens won't embrace services unless they're sure their data is secure. Almost 80% of citizens expect government to use and store personal data ethically and securely (and this rises to 90% for those who have high trust in government). But only 38% are more comfortable sharing their data online than attending government services in person and this has not improved over time (36% in June 2020).



Dial up digital inclusion

Reported difficulties in using the COVID-19 vaccine passport illustrate the lack of digital ability among some people. Thirty percent of citizens feel left behind in this new, tech savvy world (up from 26% in June 2020). Citizens need to be empowered to upskill in digital, especially those excluded from the workforce or education

sector, and they should be provided opportunities to learn and integrate these skills in daily life. Differences in results for Australians living in regional areas calls for a tailored approach that recognises the unique challenges in the regions and supports alternative support models.

Then, there's the issue of trust and security. While working to improve security, governments have an opportunity to better communicate the level of protection provided, in order to reduce misinformation and alleviate uncertainty among citizens who might otherwise be excluded.

Consolidation is key to managing the digital ecosystem

The upswing in new services and channels is not without downsides, and citizens are showing signs of overload. Our survey found citizens are using a range of channels to access services (the average interaction requires 1.5 channels per person), and 46% believe the increased range of channels makes the process of accessing government services more confusing than ever before (up from 40% in June 2020).

Within those channels, some citizens report feeling overwhelmed by navigational issues. Thirty-seven percent find it difficult to navigate government services now that more processes are digital, while only 44% feel they can find help if they have difficulty using digital systems.

There is, however, a demographic divide when it comes to opinions around navigation. For instance, younger citizens, residents of NSW, and those who are employed full time are more likely to report 'easy' navigation.

Our survey found that those who agree that government services are easy to navigate also demonstrate significantly higher trust in government. Yet there is the inverse of this. Business owners and self-employed citizens are more likely to find navigation 'difficult' and trust in government has also declined significantly among these two groups (down from 41% in June 2020 to 16% in Jan 2022).

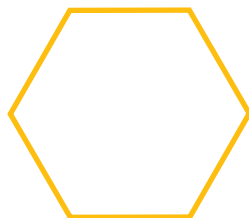
In addition, we're seeing hyper-localisation and complexity in the ecosystem where the degree of trust in levels of government differs markedly between citizens in different geographic areas. And where citizens' trust in specific professions (such health professions), and trust in state governments, differs from their level of trust in the federal government in some instances.



Consolidate and integrate

While governments are already working hard to foster trust, there's a need to consolidate brands, channels, information, messaging, and sources of truth. Also, to integrate these elements in response to hyper-localisation. Eighty percent of citizens want connected services (linking processes across departments), citing this is an important aspect of interacting with government services.

Much of this consolidation should focus on simplifying channels, including creating integrated channels to leverage existing platforms and avoid duplication. At the same time, the government should cast a critical eye over legacy channels, apps and services, and remove any that are outmoded to create a truly seamless end-to-end citizen experience. Then, they should follow this with tailored education to ensure some citizens are not left behind.



Steps to sustain citizen engagement

The government is actively seeking to sustain citizen engagement. To further this work, we recommend that they:



Engage - The future of government service delivery goes well beyond citizen-centric services or whole-of-government approaches; it involves whole-of-life service delivery, putting citizens at the heart of everything. This means adopting an integrated approach across multiple agencies to meet people's needs. And it means designing services that fit into people's lives, and not the other way around.



Include - Social exclusion costs the Australian economy \$45 billion each year and impacts 6.7 million people. Governments are aware of the need for an inclusive and personalised approach to service design and delivery, however, this has never been more critical. PwC's Inclusion by Design methodology is a no-regrets approach for designing government products and services that are inclusive and accessible at their core.



Consolidate - Government departments and agencies are complex organisations and delivering seamless digital experiences requires them to consolidate and integrate channels, brands, messaging and more, including leveraging/modernising existing channels.

www.inclusiveaustralia.com.au/resources/the-inclusive-australia-social-inclusion-index-2019-20-report





Get in touch

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

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