Post-COVID-19 Government Citizen Experience Report: A National Study

Understanding how constituents feel about their engagements with Federal Government agencies since the pandemic

Executive Summary

Accelerated adoption of digital efficiencies during the pandemic has been a driving force for technology upgrades aimed at enhancing customer experience.

We are living in a world significantly altered by the COVID-19 pandemic, and it doesn't take a research study to point out that contactless service is the norm in almost every facet of our lives. The pandemic has escalated how providers digitally engage with us, and how we, as individuals, have evolved our behaviors to accommodate and integrate digital platforms day-to-day. But what about the experience of constituents when interacting with the Federal Government, better known as the "citizen experience?"

To better understand the shift in public perception and behavior as it relates to the citizen experience, we surveyed more than 2,000 Americans in late 2020 from across the country to assess their opinions of their Federal Government experience since the onset of the pandemic. This study evaluates their digital behaviors and preferences for engagement and identifies specific needs that are not currently being met.

The results captured in this study span from individuals' preferences for self-service, to perceptions regarding data privacy and their expectations for good customer experience. *CMS Wire* references multiple studies on how collectively we've become accustomed to improved digital and virtual experiences, and the bar is being continually raised as more companies adopt advanced technology to meet those expectations.

Despite the rapid adoption of technological enhancements across consumer-facing industries, the findings of this report identified that just **7.61% of constituents saw an improvement in their experiences when interacting with Federal agencies since the start of the pandemic.**

This means 92.39% saw no change.

How important is this shift? The respondents of this study predict their reliance on digital options will only increase moving forward. In fact, *BusinessWire* reported in a recent study that whether individuals' digital engagement with customer service rose or remained the same in 2020, nearly half of all respondents plan to increase their use of chatbots, virtual agents and self-service overall.

In an effort to help guide those looking to pursue digital improvements, this report outlines areas of opportunity that the Federal Government should consider to support the much-needed shift towards improving the citizen experience. The key needs and expectations that emerged from this research are immediately actionable in overcoming negative perceptions, and many digital solutions and technologies exist today to address and improve these challenges. The findings are a first step in creating progress towards better, more customer-focused interactions and greater efficiency in government operations in support of the constituent experience.

1. COVID or Not, Citizens Want to Do It Themselves

Respondents overwhelmingly preferred self-service options for their Federal Government interactions. What device wins? Surprise, it's desktop.

Sadly, as of this report, there is still a global pandemic. Citizens are still working from home, learning remotely and communicating with loved ones virtually. Contactless engagement is now a habit for most Americans and is easily woven into the patterns of our days.

Before COVID-19, when we as a nation were out and about, smartphones were the preferred means of doing everything, from shopping to banking. The vast majority of Americans (92.8%) own a smartphone, and in 2020 more than half of all web traffic was conducted via mobile. (SOURCE: *Statista*)

Preferences for self-service were already rising pre-COVID, but the pandemic accelerated this preference and added a twist. With more people working and learning from home, the use of desktops and laptops has increased in comparison to smartphones.

When we asked citizens how they prefer to complete digital transactions, ranging from completely self-service options (performing tasks autonomously) to speaking to an individual, respondents were clear. While individuals' first preference was a self-service approach via desktop or laptop, they pivoted to speaking with a live representative rather than perform that self-service task via smartphone or tablet device.

36.41% Prefer to do self-service via desktop or laptop

27.99% Prefer to speak with a person by phone

18.76% Prefer to do self-service via smartphone interface

6.93% Prefer to speak with someone in-person

5.26% Prefer to do self-service via tablet (such as Kindle or iPad)

4.64% Prefer to do self-service by phone by automatic "press one for..."

This breakdown indicates constituents are approximately divided into thirds when it comes to preference between using a computer, speaking with a person on the phone or using a mobile device to complete transactions with the government. With constituents almost equally divided, agencies need to be prepared to deliver services each way.

# 2. Feedback Is Now a Cultural Expectation

Would you go to a one-star restaurant to dine? Likely not. How would you feel about a one-star Department of Justice?

We may or may not participate, but rating experiences and sharing them outwardly with either our personal network or the provider is now part of our culture. Giving feedback, having the opportunity for feedback and what happens after an individual has a bad or good experience, feedback or not, is a topic unto itself.

In this survey, we were interested in whether feedback to the Federal Government on the citizen experience varied from how individuals give feedback in non-governmental experiences. That is, do constituents hold the government to a different standard? Some of the secondary research we found in preparing for this survey suggested that after one or more bad experiences with a provider, a fairly large contingent would not complain but would simply change providers.

You can't exactly shop around for another government. So the question became: Would people post on their social networks or tell others about positive or negative experiences with the government as if they were ordering a pizza, using online banking, or buying a car?

Our research was clear and consistent: Constituents want to engage with government agencies as they do with non-government organizations when it comes to communicating about a good or bad experience. They also want to share that information with others.

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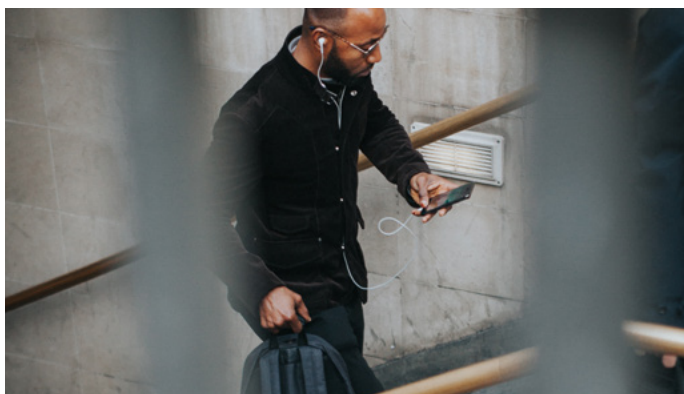
In fact, over 75% of respondents reported

they were likely to tell their friends and/or post to their social channels about a poor experience, whether dealing with government agencies or not.

Compared to the previous year, _Forbes_ research showed that only 30% of consumers who had a negative experience said they would share it on social media or leave a negative review online. This perceivable shift not only indicates that more of us are having digital experiences and are reporting on those experiences, but as more organizations optimize their technology, the consumer expectation for quality experiences is increasing. While the ability for all Federal agencies to collect feedback and measure effectiveness isn't yet a reality, it's certainly an ideal scenario in the 21st century.

But what about the good experiences?

In general, people tend not to share positive experiences quite as much as negative experiences. 36% of respondents reported that they have not shared a positive experience with any provider, but 69.85% said they have posted positives on their social channels.

3. Data Safety Is a Perceived Threat

A significant number of people are concerned that their data is not safe with the Federal Government or that the government might sell their data.

This survey was deployed prior to the reporting of the 2020 data breach of many U.S. agencies. We suspect if a poll was taken now, the percentages of people concerned with Federal Government and data safety would be significantly higher.

User experience, in its purest definition, is about seeing the world through the eyes of the prospective user. The two-edged sword of seamless living and consumerism can be observed when clicking on a pair of shoes in a photo on Instagram. That pair will then be presented to you by multiple purveyors of shoes across other social networks and websites (some of which have put them on a private sale just for you), allowing you to buy them with one click and receiving them the very next day. This is an everyday example of how data is shared. Consumers are now trained to want these types of seamless, streamlined engagements at instantaneous speeds – but at what cost?

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22.66% of respondents had concern about the privacy of their information, specifically, if their information was at risk of being hacked. In addition, 15.77% indicated that they were concerned that the Federal Government could share their data with other entities.

Another concern expressed by the respondents was the fear of being scammed, or otherwise engaging with an entity that looks like the Federal Government but is not.

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17.58% of respondents

were concerned that they could not easily tell the difference between communications from the Federal Government and a scam.

4. Digital Tech Is No Longer Just for Digital Natives

A majority of people are comfortable using technology, but many felt that the Federal Government's technology is not on par with that of the rest of the world.
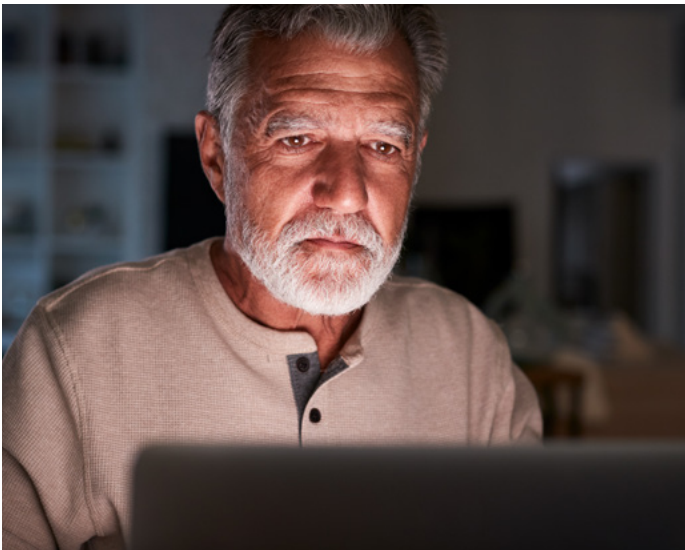
Academic, statistical theorist, and market trader Nassim Nicholas Taleb wrote a book in 2007 called *The Black Swan*, about the impact of highly improbable, outlier events and our human tendency to look back on them as obvious in hindsight. Self-service, for instance, certainly existed and was even perfected in some cases by some non-governmental organizations prior to COVID-19. But cataclysmic events, such as a global pandemic, tend to obliterate strategies that include "baby steps" or small, incremental improvements.

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If there were ever a time that organizations were to step up their own digital game, this is it.

The race to deliver improved contactless and self-service engagements hit every sector. From banking to fast food to healthcare, pandemic winners correlated to which companies could deliver trustworthy, superior contactless customer experiences.

Although 72.94% of respondents reported they are confident enough in their technical abilities to prefer self-service options, many points of frustration were shared, once again pointing to an immediate need for adoption of improved digital solutions.

The voice of the people was heard loud and clear in the open-ended questions, with specific suggestions to improve the Federal digital experience. There were a couple thousand comments. Here is a sample:

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"The websites that I have interacted with seem to be running on old software and are not user-friendly."

"If I can do 99.99% of my banking on a website or app, I should be able to view my IRS taxes, file my taxes, apply through USA Jobs, or any other government need with the same ease."

5. Untimely Service Is Still an Issue for Many Americans

Here is where the lines of "service" and "experience" blur.

What defines an experience as untimely? That is, of course, a matter of subjectivity, depending on whom you ask.

For some callers, five minutes is an atrociously long time. For some providers, five minutes may be in the range of totally acceptable customer service, particularly depending on the time of day.

Going back to an earlier point about frustration leading customers to simply select another provider, that option isn't available, so they must either stay on the line or call back later, which is inconvenient at best.

The majority of our actionable unaided responses regarding "what would you like to tell the Federal Government" were about phones and humans. Wait times, no call backs, a perception of inappropriate staffing and training and general courtesy were all issues. It was also evident that people were accessing websites prior to making a phone call, either looking for a number or having a bad experience finding an answer and calling as a last resort.

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In this study, we found that 39.82% of respondents reported wait times over five minutes, 33.41% report information on Federal websites was "hard to find" and 13.41% experienced wait times of more than two weeks for a virtual or telephone appointment.

Conclusion

In conclusion, the results of this study have shed light on the primary challenges that constituents have faced, specifically since the start of the pandemic. Growing concerns with data privacy and security, the inability to quickly and easily find information and access to self-service should be firmly in the sights of any entity looking to meet, or exceed, expectations.

With many left wondering if they'll ever return to a physical office, and those who resisted the digital shift now becoming accustomed to the virtual way of life, the Federal Government has a prime opportunity to embrace this new era of digital technology and redefine the current perception of citizen experience.

Methodology

The results of this report are based on an online survey that was conducted between October 24 - November 2, 2020. The sample produced 2,312 complete surveys among a representative sample of adults 18 years and older across the United States.

Approximately half of the surveys were completed on desktop or laptop computers. The rest were completed on phones and tablets.

Respondents for this survey were selected from among those who have volunteered to participate in online surveys and polls. The data have been weighted to reflect the demographic composition of the 18+ population. All sample surveys and polls may be subject to multiple sources of error, including but not limited to sampling error, coverage error, error associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments.

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Income levels were representative of the U.S. population.

54% of respondents identified as male; 46% identified as female.

Respondent age breakdown (%):

18-29 - 11%
30-44 - 34%
45-60 - 14%
> 60 - 41%

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