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The Public Is Still Skeptical Of Federal Digital Customer Experience

by Rick Parrish
February 18, 2016

Why Read This Report

Since 2011, the White House has been trying to improve the federal digital customer experience (CX). Five years later, federal digital CX is finally starting get better. Unfortunately, customers remain apathetic about digital government in both theory and practice. In this report, we detail key findings from a recent Forrester survey for CX pros. We highlight federal customers' attitudes toward various digital channels, identify major digital CX initiatives that still leave customers cold, and offer four tactics to keep federal digital CX on the right track.

Key Takeaways

Customers Think Federal Digital CX Is Starting To Improve
Widespread federal efforts to boost the digital customer experience are just beginning to pay off. In a recent Forrester survey, we found that federal customers still prefer in-person interactions to websites, email, or mobile. However, customers like social and chat channels best overall and think that websites are getting better.

The Public Remains Apathetic About Digital Government
Despite this preliminary success, only 39% of federal customers want Washington to offer more digital services, and just 32% trust it with their personal data. The public's interest in federal location-based services and a governmentwide web portal has declined. Less than half of the public wants either a single sign-on or biometric federal ID.

Use Four Tactics To Overcome The Indifference
Faced with pressure from the White House to boost digital public interactions, federal agencies must find the right channel for each service. They must also explain the benefits of new digital services, protect digital CX from overbearing security practices, and design mobile experiences more strategically.

The Public Is Still Skeptical Of Federal Digital Customer Experience

by Rick Parrish
with Harley Manning, Gabriella Zoia, and Kara Hartig
February 18, 2016

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We used Forrester's North American Consumer Technographics® Healthcare And Government Survey, 2015, in the writing of this report.

Related Research Documents

Five Ways For Federal Agencies To Improve The User Experience And Digital Security

Predictions 2016: The Government's Slow Progress

The US Federal Customer Experience Index, 2015

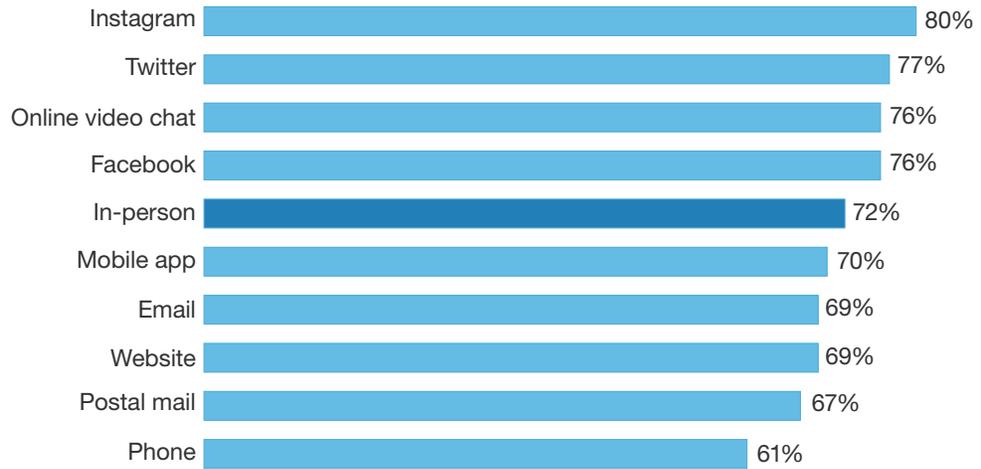## Customers Slowly Warm To Federal Efforts To Improve Digital CX

Powered by the US Digital Services Playbook and a crop of new digital designers and CX professionals, federal agencies are working hard to improve CX across all digital channels. In the past few months, the National Park Service created findyourpark.com to provide recommendations that it bases on users' locations. Also, US Citizenship and Immigration Services held its first live Twitter question-and-answer session, and the National Cancer Institute debuted a mobile app and SMS tools to help smokers quit.[1] Efforts like these throughout the federal government are just starting to pay off. In a recent Forrester survey, we discovered that federal customers who are ages 18 and older, live in the US, and go online at least weekly:

› **Prefer in-person interactions to mainstream digital channels by slim margins.** A full 72% of federal customers who have interacted with the federal government in person in the past 12 months reported being satisfied, across channels like US Post Offices, Social Security Administration locations, and Veterans Affairs regional benefits offices. That's slightly higher than the 70% satisfaction score among customers who've used federal mobile apps in the past 12 months and the 69% among those who've used federal websites or email (see Figure 1).

› **Like social and chat channels best overall.** Of the 10 channels in the study, four social and chat channels — like Twitter and live text chat on agency websites — earn the highest customer satisfaction ratings. Instagram's 80% satisfaction score among those who have used it to interact with the federal government makes it the top-rated channel for federal customer interactions. That's 3 percentage points higher than runner-up Twitter and a whopping 19 percentage points better than telephone channels, which ranked lowest overall.

› **Think websites are improving — but still have a long way to go.** Our data shows that 53% of federal customers now agree that federal websites are "exactly what [they] should be," just 2 percentage points higher than our 2014 survey showed (see Figure 2). This small increase probably results from improvements that made federal websites easier to use and better organized. In fact, 59% of federal customers who have interacted with a federal agency on its website in the past 12 months now consider federal websites to be easy to use, up from 52% in 2014. Similarly, 58% of the same segment now agree that federal sites are well organized, a sizable jump from 50% in 2014.

FIGURE 1 The Public Likes Social Channels Best But Prefers In-Person Interactions To Mainstream Digital Channels

"How satisfied are you with each of the following types of interactions with a federal agency?"
(4 or 5 on a scale of 1 [not at all satisfied] to 5 [very satisfied])

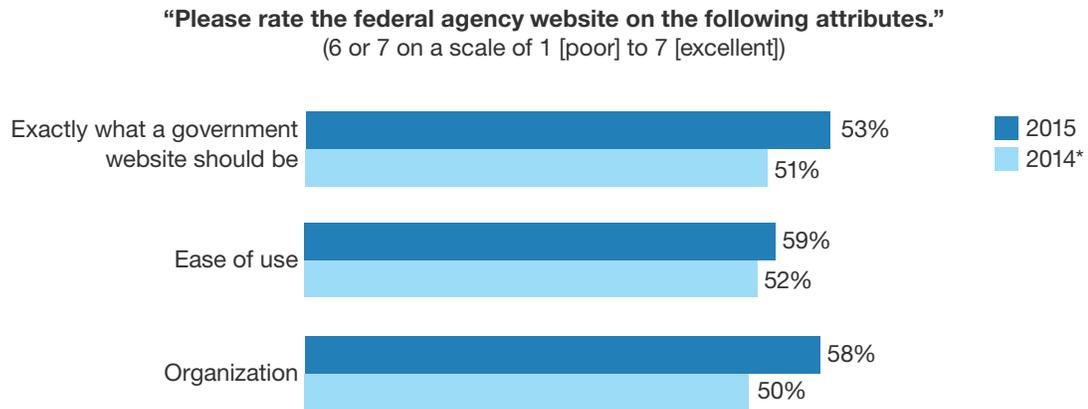| Channel	Percent
Instagram	80%
Twitter	77%
Online video chat	76%
Facebook	76%
In-person	72%
Mobile app	70%
Email	69%
Website	69%
Postal mail	67%
Phone	61%

Base: 116-980 US online adults (ages 18+) who have interacted with a
federal agency in the mentioned way in the past 12 months

Source: Forrester's North American Consumer Technographics®

FIGURE 2 Federal Agency Websites Have Slightly Improved In Key Areas

"Please rate the federal agency website on the following attributes."
(6 or 7 on a scale of 1 [poor] to 7 [excellent])

Exactly what a government website should be — 2015: 53%, 2014*: 51%

Ease of use — 2015: 59%, 2014*: 52%

Organization — 2015: 58%, 2014*: 50%

■ 2015
■ 2014*

Base: 1,233 US online adults (ages 18+) who have interacted with a federal government agency on its website in the past 12 months
*Base: 1,432 US online adults (ages 18+) who have interacted with a federal government agency on its website in the past 12 months

Source: Forrester's North American Consumer Technographics® Healthcare And Government Survey, 2015
*Source: Forrester's North American Consumer Technographics Healthcare And Government Survey, 2014

The Public Isn't Completely Convinced

Despite Washington's preliminary success at improving the quality of digital experiences, federal customers remain apathetic about digital government in both theory and practice. In fact, our research shows that public interest in some aspects of federal digital CX has declined since 2014.

Federal Customers Don't Like The Idea Of Digital Government

Improvements to particular federal digital experiences have not yet overcome public skepticism about the notion of digital government. Our data shows that federal customers still:

› **Don't want more digital interactions with federal agencies.** Overall, only 39% of federal customers agree that the federal government should focus on offering more digital services (see Figure 3). That's slightly lower than in our 2014 survey. Within that apathetic context, a deeper look at the data shows that opinions vary among age groups. Adults ages 18 to 24 and ages 45 and older have all become less interested in digital government, while those ages 25 to 44 have grown slightly more interested.

› **Don't trust the federal government with their personal data.** Just 32% of federal customers are confident that the federal government keeps their personal data secure (see Figure 4). This feeble figure is even lower than the 35% of customers who trusted Washington with their data in 2014.
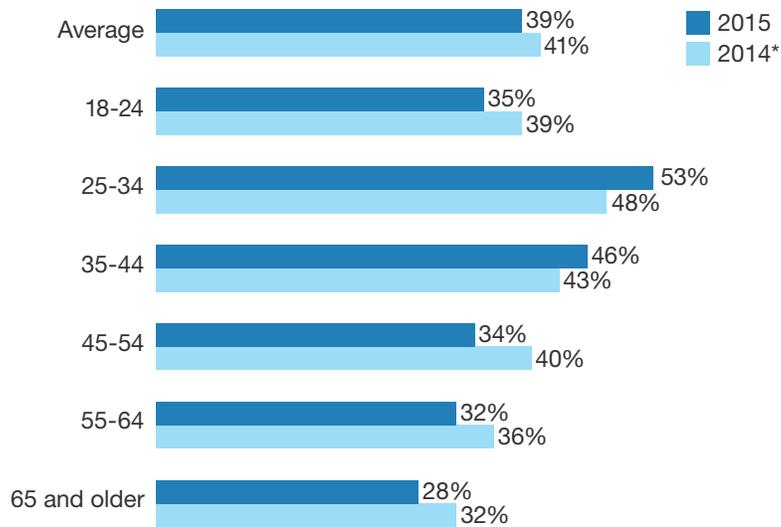
The good news is that trust in federal website security has remained stable, with 65% of federal customers who've interacted with the federal government on websites in the past 12 months agreeing that federal websites are "safe and secure."

FIGURE 3 Opinions On Whether Washington Should Offer More Digital Services Differ By Age Group

"To what extent do you agree or disagree with each of the following statements about the federal government?" (Responses are shown for, "The federal government should focus on offering more digital services.")
(4 or 5 on a scale of 1 [do not agree at all] to 5 [strongly agree])

Age Group	2015	2014*
Average	39%	41%
18-24	35%	39%
25-34	53%	48%
35-44	46%	43%
45-54	34%	40%
55-64	32%	36%
65 and older	28%	32%

Base: 4,610 US online adults (ages 18+)
*Base: 4,482 US online adults (ages 18+)

Source: Forrester's North American Consumer Technographics® Healthcare And Government Survey, 2015
*Source: Forrester's North American Consumer Technographics Healthcare And Government Survey, 2014

FIGURE 4 Many Federal Customers Think That The Government Does Not Keep Their Personal Data Secure

4-1 | **"To what extent do you agree or disagree with each of the following statements about the federal government?"**

"I am confident that the federal government keeps secure any personal information it has on its citizens."
(Responses on a scale of 1 [do not agree at all] to 5 [strongly agree])

■ Disagree (1 or 2) ■ Neutral (3) ■ Agree (4 or 5) ■ Not applicable

| 37% | 26% | 32% | 5% |

Base: 4,610 US online adults (ages 18+)

4-2 | **"Please rate the federal government agency's website on the following attributes."**

"The federal government agency's website is safe and secure."
(Responses on a scale of 1 [poor] to 7 [excellent])

■ Poor (1 or 2) ■ Neutral (3 through 5) ■ Good (6 or 7) ■ Not applicable

| 4% | 30% | 65% | 1% |

Base: 1,233 US online adults (ages 18+) who have interacted with a federal government agency on its website in the past 12 months

Source: Forrester's North American Consumer Technographics® Healthcare And Government Survey, 2015

Customers Don't Care About Specific New Or Planned Digital Experiences Either

Enhancements to existing federal digital interactions also haven't boosted public interest in new types of digital experiences that excite many federal technology leaders. Our survey shows that federal customers:

› **Have even less interest in location-based services.** A mere 25% of federal customers who use a mobile phone or tablet are interested in federal mobile apps that tailor safety alerts and other government information to the user's location — a 5-percentage-point drop since 2014 (see Figure 5-1). However, the reasons for customers' disinterest shifted from government-specific privacy concerns to lack of interest in location-based services overall. Of mobile and tablet users who weren't interested in location-based services from the federal government, the proportion who

expressed apprehension about the government knowing their location or protecting their privacy dropped from 40% to 33%, while the number of customers who said that they don't use any location-based services at all rose from 25% to 34% (see Figure 5-2).

› **Find a single government portal less appealing.** Only 50% of federal customers express interest in a single website or mobile app that they could use to access all federal information and services, which is a slight decline from the 53% of federal customers who supported the idea in 2014 (see Figure 5-3). Interestingly, our data shows that customers who think that individual federal websites are "just what they should be" but who are overwhelmed by the sheer number of them are the most likely to support a single government portal.

› **Don't want a single sign-on or biometric ID.** Just 41% of customers want an electronic ID to access all of their federal accounts, which is the same number who expressed interest in 2014 (see Figure 5-4). Similarly, only 42% of federal customers are interested in using a biometric ID, such as a fingerprint or retinal scan, instead of a driver's license or other traditional ID when interacting with federal agencies (see Figure 5-5).

FIGURE 5 Few Federal Customers Are Interested In Additional Location-Based And Digital Services

5-1 | **Interest in running federal government location-based services on mobile phones or tablets for the purpose of receiving public safety alerts or information**

"How interested would you be in running federal government location-based services on your mobile phone or tablet for the purpose of receiving public safety alerts or information about government services that are tailored to your location?"
(4 or 5 on a scale of 1 [not at all interested] to 5 [very interested])

2015	25%
2014*	30%

Base: 4,398 US online adults (ages 18+) who use a mobile phone or tablet
*Base: 4,368 US online adults (ages 18+) who use a mobile phone or tablet

Source: Forrester's North American Consumer Technographics® Healthcare And Government Survey, 2015
*Source: Forrester's North American Consumer Technographics Healthcare And Government Survey, 2014

5-2 | **"Why are you *not* interested in running federal government location-based services on your mobile phone or tablet?"**

I don't want the federal government to have access to my location	33%	
	40%	2015
I don't use any location-based services	34%	2014*
	25%	

Base: 2,110 US online adults (ages 18+ and online weekly or more often) who are not interested in running location-based services on their mobile phone or tablet
*Base: 2,084 US online adults (ages 18+ and online weekly or more often) who are not interested in running location-based services on their mobile phone or tablet

Source: Forrester's North American Consumer Technographics® Healthcare And Government Survey, 2015
*Source: Forrester's North American Consumer Technographics Healthcare And Government Survey, 2014

FIGURE 5 Few Federal Customers Are Interested In Additional Location-Based And Digital Services (Cont.)

5-3 **"How interested would you be in having one government website or app that would let you check the status of all your federal government accounts in one place?"**

Responses of 4 or 5 on a scale of 1 (not at all interested) to 5 (very interested)

2015	50%
2014*	53%

Base: 4,610 US online adults (ages 18+)
*Base: 4,482 US online adults (ages 18+)

Source: Forrester's North American Consumer Technographics® Healthcare And Government Survey, 2015
*Source: Forrester's North American Consumer Technographics Healthcare And Government Survey, 2014

5-4 **"How interested would you be in being issued an electronic ID number?"**

"This ID would be secured and issued by the US federal government and would not be your social security number or tied to your social security benefits. The electronic ID might allow you to register and log into services like online voting, public transportation, public utilities, as well as certain consumer websites (e.g., The New York Times, your mobile phone provider, your healthcare provider)."

(4 or 5 on a scale of 1 [not at all interested] to 5 [very interested])

2015	41%
2014*	41%

Base: 4,610 US online adults (ages 18+)
*Base: 4,482 US online adults (ages 18+)

Source: Forrester's North American Consumer Technographics Healthcare And Government Survey, 2015
*Source: Forrester's North American Consumer Technographics Healthcare And Government Survey, 2014

5-5 **"How interested would you be in using a biometric ID to prove your identity?"**

"For example, a fingerprint, hand scan, or retinal scan could be used in place of presenting your driver's license, social security card, or passport. This may help protect your personal privacy and security when conducting government transactions."

(4 or 5 on a scale of 1 [not at all interested] to 5 [very interested])

Not interested (1,2)   Neutral (3)   Very interested (4,5)

33%	25%	42%

Base: 4,610 US online adults (ages 18+)

Source: Forrester's North American Consumer Technographics Healthcare And Government Survey, 2015

Use Four Core Tactics To Make Digital Experiences More Palatable

Caught between ongoing public skepticism about digital CX and pressure from the White House to boost digital interactions, federal agencies must think strategically. CX professionals at federal agencies should:

› **Find the right channel for each service.** The wide disparity in customer satisfaction between social media and traditional channels may entice federal CX pros to indiscriminately move more customer interactions to the likes of Instagram and Twitter. Agencies that succumb to this temptation will harm their CX by forcing interactions into channels that they don't suit and end up wasting money supporting channels that customers won't use. Instead, federal CX pros should use foundational quantitative and qualitative CX research to establish which channels are best for each type of customer and interaction and then use driver analysis to determine how to curate the experience in each of these channels.

› **Explain the benefits of new digital services.** Our data shows that many people don't want new digital channels because they don't understand the advantages. About one-third of mobile-enabled federal customers who rejected location-based services said that they didn't understand the benefits. Although nearly two-thirds of customers declined a single sign-on, a full 50% say that they hate having to remember separate sign-in information for each federal website they visit. To help customers understand the advantages of new digital services, federal CX pros should use customer research and CX driver analysis to help their agencies' communications offices create marketing campaigns that target skeptical customers.

› **Protect the digital customer experience from overbearing security practices.** Prompted by high-profile hacks of federal systems, agencies are focused intensely on cybersecurity. That may be good news for the 62% of federal customers who say that they are more vigilant about their security in the wake of data breaches. But high security is at best a pyrrhic victory if it makes federal digital channels more confusing or difficult to use. To create digital interactions that are both safer and result in better customer experiences, federal CX pros should work with their security colleagues to explain privacy in context, keep biometric and knowledge-based authentication user-friendly, help customers choose strong passwords, and minimize the CX effects of website takedowns.[2]

› **Design mobile experiences more strategically.** Most federal agencies let internal priorities rather than customers' needs drive mobile app development. That's because these agencies measure mobile success primarily by the number of apps that they develop or sponsor, not by their rate of adoption or value to customers.[3] To improve the mobile customer experience, federal CX pros should stop touting the amount of apps that their agencies have and start using the three classes of mobile metrics — business, engagement, and technical metrics — to focus scarce mobile development resources on what customers want and need.[4]

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Supplemental Material

Survey Methodology

Forrester's North American Consumer Technographics Healthcare And Government Survey, 2015, was fielded in October 2015 to 4,616 US individuals ages 18 to 88. For results based on a randomly chosen sample of this size, there is 95% confidence that the results have a statistical precision of plus or minus 1.4% of what they would be if the entire population of US online adults (defined as those online weekly or more often) had been surveyed. Forrester weighted the data by age, gender, broadband adoption, and income to demographically represent the adult US online population. The survey sample size, when weighted, was 4,610. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) Please note that respondents who participate in online surveys generally have more experience with the Internet and feel more comfortable transacting online.

For Technographics Clients: How To Get More Technographics Data Insights

Forrester's North American Consumer Technographics Healthcare And Government Survey, 2015, of 4,616 US individuals includes many additional questions and parameters by which you can analyze the data contained in this report.

We can provide additional insights about the consumers highlighted in this report:

› Who they are (e.g., demographics, lifestyle, and interests).

› What they do (e.g., digital, mobile, social behaviors).

› Affiliations they have (e.g., brands used, products owned).

› How they feel (e.g., attitudes, interests).

If you wish to subscribe to Forrester's Consumer Technographics services, please contact your account manager or data@forrester.com. If you are an existing Technographics client, please contact your data advisor at data@forrester.com.

Endnotes

[1] Source: Find Your Park (http://findyourpark.com); "USCIS Twitter Office Hours," DigitalGov, November 6, 2015 (http://www.digitalgov.gov/2015/11/06/uscis-twitter-office-hours/); and Jennifer Johnson, "National Cancer Institute's Smokefree Tools," DigitalGov, October 8, 2015 (https://www.digitalgov.gov/2015/10/08/national-cancer-institutes-smokefree-tools/).

[2] For a detailed analysis of five key digital security practices that federal CX pros should help implement with the customer in mind, see the "Five Ways For Federal Agencies To Improve The User Experience And Digital Security" Forrester report.

[3] As agencies continued their headlong rush into mobile in 2015, the number of federal mobile apps grew to at least 300. New apps ran the gamut from social services to public safety and education. The US Department of Agriculture's (USDA's) Summer Meal Site Finder locates nearby food aid for low-income kids, the US Coast Guard's app offers tips on boat safety, and the American Battle Monuments Commission's Flanders Field app guides visitors through the historic site. In a useful attempt to systematize the array of federal apps, the General Services Administration (GSA) launched its Great Federal Mobile Product Hunt. The hunt asks agencies to make sure that all of their apps are listed on GSA's federal mobile app directory. In its first 100 days, the hunt uncovered 67 apps.

[4] Although Forrester originally defined these three classes of metrics for private-sector use, they are also relevant for government mobile development. Government business metrics include things like reduced time or cost per transaction and benchmarking against other app categories. Engagement metrics take account of the customer's initial app experience, which features customers use most and least, how an average user changes over time, how customers differ from each other, and app ratings. Technical metrics provide feedback on performance, platforms, and crashes. For more information about the three classes of mobile metrics, see the "Measuring Mobile Apps" Forrester report.

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