salesforce

CONNECTED GOVERNMENT REPORT

The Future of Digital Service

Insights from thousands of people on the global trends impacting customer and government interactions and the public sector's approach to digital transformation

GOVERNMENT
OF THE FUTURE

What You'll Find in This Report

For the first edition of the "Connected Government" report, Salesforce Insights surveyed thousands of people worldwide to answer the following pressing questions:

- How much progress have public sector organizations made on the digital front during the pandemic?

- What drives customer satisfaction and, ultimately, influences trust in government?

- How do customers want to engage with public sector organizations in a new digital world?

- What is the role emerging tech plays in creating new, trusted experiences?

Data in this report is from a series of five double-blind surveys conducted over the course of 2021 and 2022. The surveys focused on respondents 18 and older from across North America, Latin America, Europe, and the Asia Pacific regions.

- Wave 1: 5,101 global respondents surveyed in April 2021

- Wave 2: 6,077 global respondents surveyed in July 2021

- Wave 3: 11,134 global respondents surveyed in November 2021

- Wave 4: 5,574 global respondents surveyed in March 2022

- Wave 5: 8,000 global respondents surveyed in June 2022

All respondents are third-party panelists (not limited to Salesforce customers). For further survey demographics, see page 34 for survey demographics page.

Due to rounding, not all percentage totals in this report equal 100%. All comparison calculations are made from total numbers (not rounded numbers).

Contents

0.1 Introduction

Public trust in governments around the world has been on the decline for years. Global research conducted by the United Nations Department of Economic and Social Affairs (UN DESA) points out that "opinion surveys across a broader range of countries show a decline in trust in most public bodies since 2000."[1] In fact, trust in even some of the world's largest governmental systems has hit historic lows, as evidenced in recent research conducted by the Pew Research Center, which points out that in the United States alone, trust in the national government has declined from 73% in 1958 to 20% in 2022.[2]

The effective delivery of government services can leave a lasting impression on public perception of government performance. Ultimately, this impacts the government's ability to develop and deliver timely, relevant, and inclusive policies and services to people surveyed. As stated in the aforementioned UN DESA Policy Brief, "Trust in each other, in our public institutions, and in our leaders are all essential ingredients for social and economic progress. ..." Unfortunately, the path to improvement is complicated by the fact that there are a variety of factors that influence the public's trust in government.

While there has been progress on the digital front during the most recent global pandemic, much work remains to be done to close the gap between customer expectations and government's ability to consistently provide customers with trusted digital experiences. By transforming external customer interactions and internal operations, government organizations can improve trust.

As a result, more government decision makers are considering how to leverage digital tools to build trusted experiences with customers, empower employees with digital skills, and strengthen security measures to keep highly sensitive data and mission-critical systems safe from threats.

[1] "Trust in public institutions: Trends and implications for economic security," United Nations Department of Economic and Social Affairs, June 2021.

[2] "Public Trust in Government: 1958-2022," Pew Research Center, June 2022.

0.2 Introduction

Nasi Jazayeri

EVP & General Manager,
Public Sector, Industries Cloud

In today's climate of uncertainty, it is imperative that public sector organizations remain agile and always prepared to adapt to rapid change with ease. To meet the expectations of customers, government organizations are taking new approaches to digital transformation and considering how to build and maintain trust, which is a key element to a stable and thriving society.

The wave of digital transformation that was already underway across the public sector has been accelerated over the past several years as government has rapidly transformed to deliver services that meet people where they are. With customer expectations continually evolving, successful organizations are prioritizing digital-first connections, adopting new technologies to shift the way they do business, and empowering their employees with powerful digital tools to break down barriers to innovation.

The research in this "Connected Government" report offers a data-based perspective on the improvements public sector organizations have made over the course of several critical years and provides decision makers with helpful insights they need to plan for the road ahead. It is my hope that you will find this to be a valuable resource and reference tool as you work to build the connected government of the future.

0.3 Executive Summary

01 Trust Is the Foundation of Government Business

With the rapidly increasing pace of change forcing swift transformation and uncertainty in every industry, trust has never been more important – particularly for public sector organizations. **Eighty-seven percent of people surveyed believe trust becomes more important in times of change.**

02 Global Crises Increase Digital Demands

Many digital transformation and customer experience initiatives were accelerated during the pandemic when waves of lockdowns forced governments to shutter in-person operations, which resulted in an increase in the availability of government services via digital channels. **Fifty-four percent of people surveyed now say it's easier to get help from government online than in person.**

03 Technology Powers Transformation

Using the power of digital tools, public sector organizations have a significant opportunity to leverage technology to transform customer experiences. **In fact, only 16% of people surveyed believe that government has successfully used technology to improve customer experiences.**

04 Investment in the Employee Experience Pays Off, for Everyone

Employees are invaluable to a functioning government. However, not all government employees have the tools they need to effectively deliver on the mission. Equipping public sector workers with modern tools, critical data insights, and digital skills will empower them to consistently deliver transformative experiences to the customers they serve. **Forty-seven percent of people surveyed feel that government employees lack the necessary tools to effectively serve the public.**

# Trust Is the Foundation of Government Business

01

The uncertainty caused by multiple global crises has highlighted the importance of public sector institutions. These organizations, and the people who power them, are responsible for delivering critical services that strengthen our economies, safeguard the health of our communities, and keep national borders secure.

While establishing and maintaining trusted relationships is relevant to organizations across every industry, trust is of particular significance when it comes to government-consumer relations because the public's perception of a functioning, fair, and capable government has direct impact on customer engagement.

Forty-six percent of people surveyed report that they only trust their government a little or not at all. Yet, while public trust in government has been on the decline, its importance is rising.

Trust is so much more important now because trust is critical to success in times of crisis and rapid transition. In fact, 87% believe that trust becomes more important in times of change.

To meet the digital expectations of today's citizens, government organizations are taking new approaches to digital transformation and considering how to build and maintain trust.
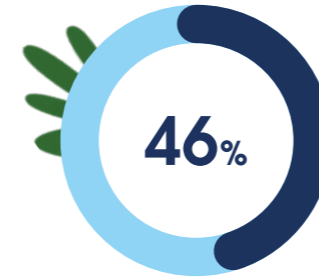
46% of people surveyed report that they only trust their government a little or not at all.
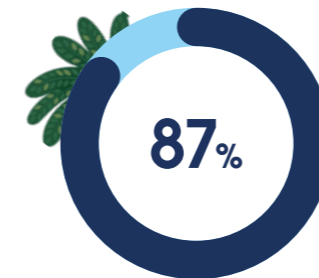
87% of people believe trust becomes more important in times of change.[1]

[1] Wave 5 survey data (see appendix) "State of the Connected Customer," Salesforce Research, May 2022.

01 Trust Is the Foundation of Government Business

When it comes to improving trust, customers demand the same things from their local and national governments.

At the top of the list, people most desire government services that offer transparency and that are easy to understand, use, and access.

There are a number of factors that influence the public's trust in government. The effective delivery of government services can leave a lasting impression on public perception of government performance and, ultimately, impacts government's ability to develop and deliver timely, relevant, and inclusive policies and services.

While there has been progress made on the digital front, much work remains to be done to catch up to the private sector in providing citizens with trusted digital experiences. By taking a holistic and customer-centric approach to digital transformation, government organizations can move closer to their goal of building digital trust.

Transparency, Ease, and Accessibility Are Top Factors in Building Customer Trust in Government

The attributes respondents say are most important for building trust in their government are

Attribute	Local	National
Transparency	51%	53%
Easy to engage	48%	44%
Accessibility	47%	44%
Speed	45%	40%
Flexibility	34%	36%
Personalization	19%	20%
Other	1%	1%

Local   National
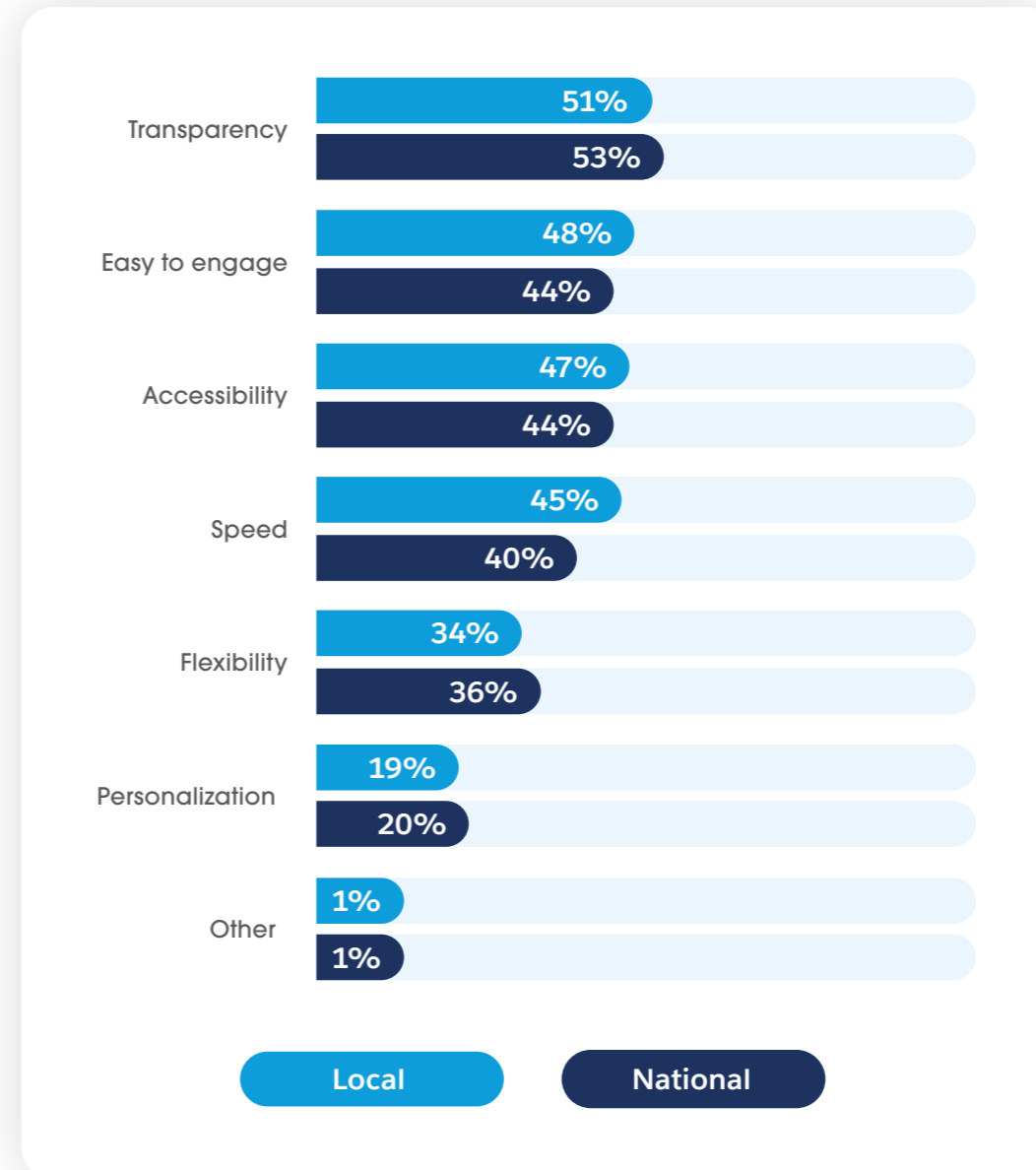
*Data on this page refers to respondents in Wave 4 (see appendix).

01 Trust Is the Foundation of Government Business

The quality of customer experience directly influences the level of trust in governments by customers. Creating consistently exceptional experiences builds a strong government-customer trust dynamic and can help public sector organizations do a better job of meeting the unique needs of their customers. **Eighty-seven percent of respondents said that a great digital government customer experience would increase their degree of trust.[1]**

Conversely, in the absence of trust, customer engagement levels are negatively impacted, which hampers government's ability to deliver services and policy outcomes that are truly representative of the population. Case in point: **Nearly a third of respondents say that trust has a major impact on their willingness to share personal information, and 44% of people surveyed stated that trust has a major impact on their willingness to vote,** which is a critical tenet of a functioning democratic society.

And, in the context of the next technological wave, building trusted and *secure* digital experiences has never been more important.

Trust Has a Direct Impact on Citizen Engagement Levels

Impact of Trust on Constituent Behavior
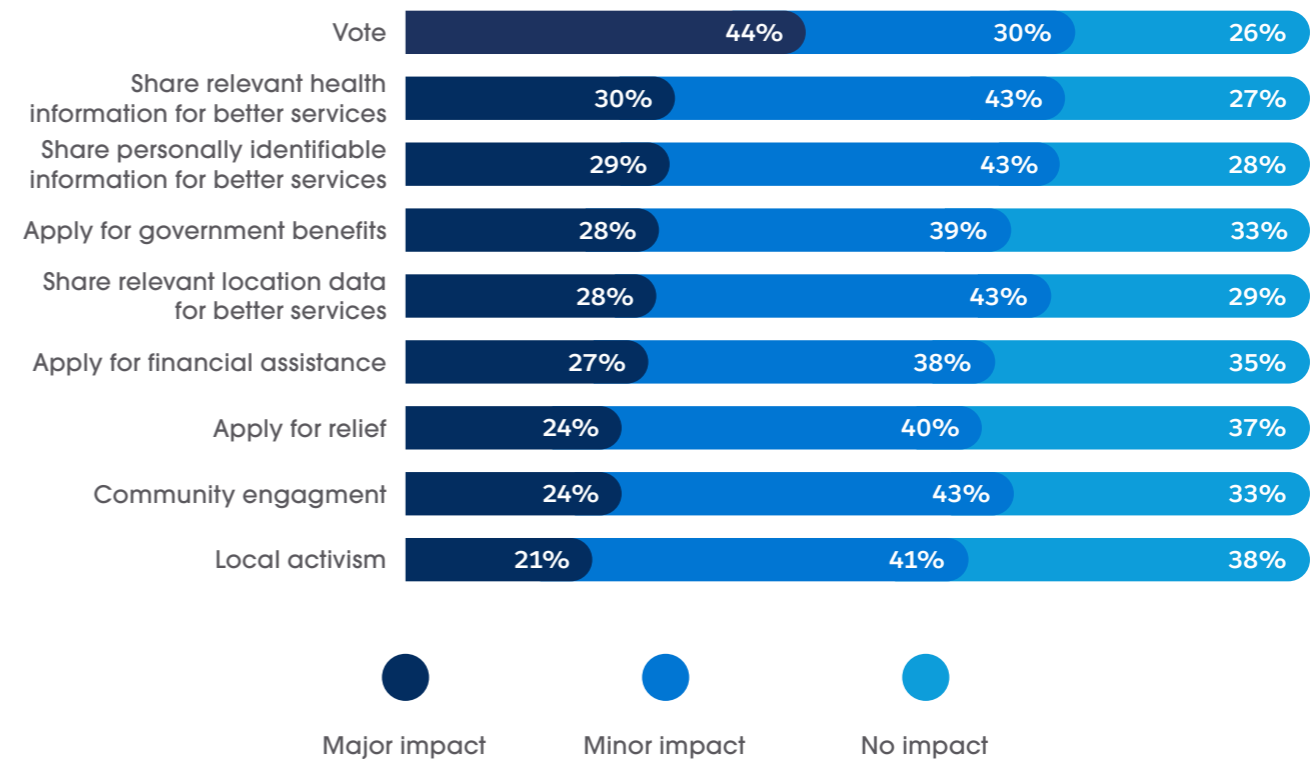
Behavior	Major impact	Minor impact	No impact
Vote	44%	30%	26%
Share relevant health information for better services	30%	43%	27%
Share personally identifiable information for better services	29%	43%	28%
Apply for government benefits	28%	39%	33%
Share relevant location data for better services	28%	43%	29%
Apply for financial assistance	27%	38%	35%
Apply for relief	24%	40%	37%
Community engagment	24%	43%	33%
Local activism	21%	41%	38%

● Major impact   ● Minor impact   ● No impact

1.1

Spotlight: Security Concerns Are Rising

In recent years, complaints of internet crimes have steadily grown and – in the United States alone – the annual aggregate losses associated with these crimes exceeded $6.9 billion USD in 2021.[1] With the proliferation of IoT devices and greater access to data from anywhere in the world, new threat vectors for bad actors are a constantly growing global problem.

Public sector organizations are required to meet some of the most stringent national and international security and compliance requirements in the world. And with heightened awareness of data breaches and misuse in recent years, customers expect government agencies to place a high priority on not only securing highly sensitive data but demonstrating their competence and commitment to doing so.

When asked for the most important improvements governments can make in their service delivery and/or interactions with the public in the future, customers cited security and transparency as leading factors.

[1] "2021 Internet Crime Report," Federal Bureau of Investigation.

Security and Transparency are Key to the Trust Equation

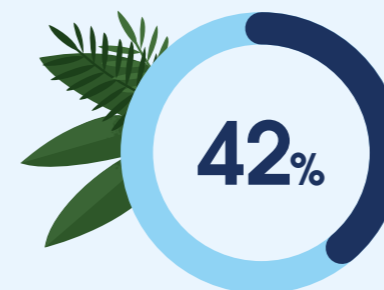What are the most important improvements governments can make on their service delivery and/or interactions with the public in the future?

50% cited a guarantee of security of personal or institutional data.

43% mentioned greater levels of transparency around how data is secured.

42% want more transparency around how data is being used.

*Data on this page refers to respondents in Wave 2 (see appendix).

02

Global Crises Increase Digital Demands

COVID-19 not only changed the way people got their groceries or went to work, it upended how people interacted with their governments.

Seventy-four percent of people surveyed say the pandemic changed the way their government delivers services.*

One of the most significant changes to the way people engage with private sector and public sector organizations is the fact that, in this new paradigm, the customer experience is now primarily digital-first. Many digital transformation and customer experience initiatives were accelerated during the pandemic when waves of lockdowns forced governments to shutter in-person operations. This resulted in agencies jumping into action to adapt and rapidly expand the availability of critical services via digital channels.

Fifty-four percent of people surveyed now say it's easier to get help from government online than in person.*

People Feel That the Pandemic Significantly Impacted Government Operations and Find Digital Access Easier

Left statement	Left %	Right %	Right statement
I trust my government to do the right thing	47%	53%	I do not trust my government to do the right thing
The pandemic has changed the way government delivers services	74%	26%	The pandemic has not changed the way government delivers services
The pandemic has made the government more resilient	47%	53%	The pandemic has made the government less resilient
I trust government to protect my personal data	53%	47%	I do not trust government to protect my personal data
Government has better customer service than other industries	31%	69%	Government has worse customer service than other industries
The government has the tools it needs to help me	53%	47%	The government does not have the tools it needs to help me
It's easier to get help from the government online	54%	46%	It's easier to get help from the government in person

*Data on this page refers to respondents in Wave 3 (see appendix) and "State of the Connected Customer," Salesforce Research, May 2022.

02

Global Crises Increase Digital Demands

Digital-first interactions are poised to gain momentum as public preferences continue to lean in the direction of online engagements. In addition to increasing government capacity to deliver on mission, a more aggressive focus on digital efforts can help public sector agencies keep pace with their customers' preferences and behavioral patterns.

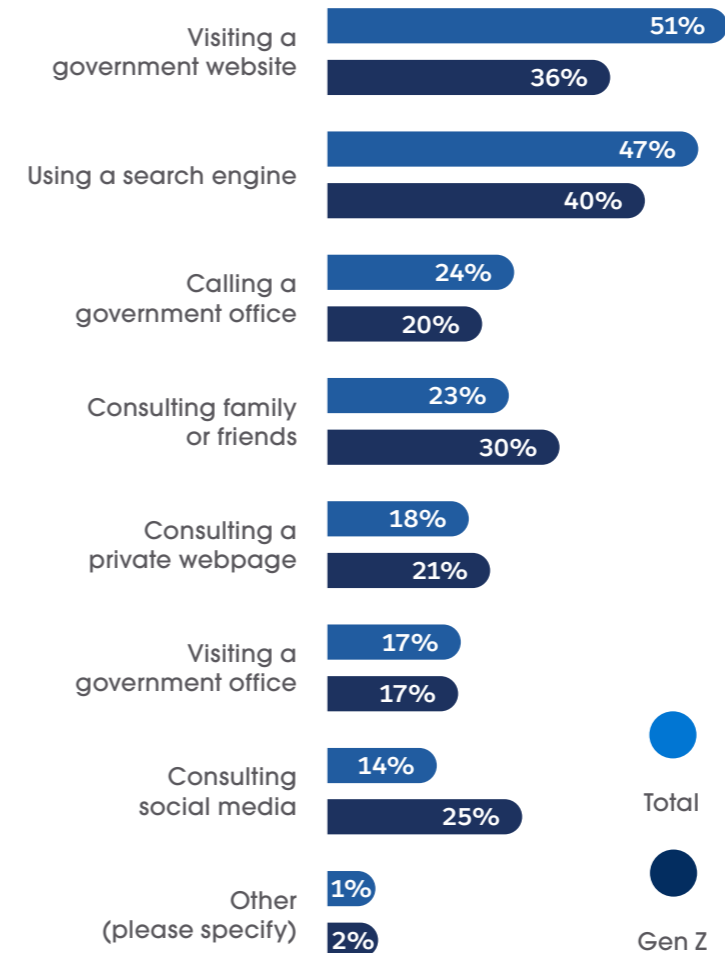When asked where they are most likely to seek information about public services – for example, up-to-date health information at the national level and trash pickup at the local level – survey respondents consistently indicated that online or digital channels were their de facto sources.

This pattern is true across all customers, and with a rising digital-native population in Gen Z, social media has a notably significant influence. One in four Gen Zers are using social media as a primary source of reliable information about public services. Providing more reliable services in constituents' preferred method enables governments to rebuild trust with them, constituents, specifically Gen Zers, and increases citizen engagement.[1]

People Consistently Prioritize Online Sources for Public Information

Source	Total	Gen Z
Visiting a government website	51%	36%
Using a search engine	47%	40%
Calling a government office	24%	20%
Consulting family or friends	23%	30%
Consulting a private webpage	18%	21%
Visiting a government office	17%	17%
Consulting social media	14%	25%
Other (please specify)	1%	2%

Getting information: Visiting a government website and using a search engine are the top two ways people get information on public services – and by a wide margin – followed closely by social media for Gen Z.

[1] "How Gen Z's Preferences Can Increase Citizen Engagement in the Public Sector," Salesforce 360 Blog, January 2022.

*Data on this page refers to respondents in Wave 3 (see appendix) for purposes of this study, Gen Z includes respondents who identified as being born between 1997 and 2004.

02

Global Crises Increase Digital Demands

Even as in-person engagements return, people today remain decidedly digital-first, preferring to interact with brands and even public sector organizations online in most – but not all – situations.

Notably, customers still prefer to manage "milestone moments" (for example, change-of-life events or applying for a passport or visa) in person. Nevertheless, with a growing population of digital-native customers, the general sentiment still skews heavily toward a digital-first approach for more transactional interactions.

In a time when rapid change and agile service delivery models are the norm, inflexible legacy systems and processes risk becoming less effective under increased pressure to be adaptable and responsive.

"A digital-first strategy not only better positions public sector organizations to respond in times of crisis but is also key to long-term business growth."

Nasi Jazayeri, EVP & General Manager, Public Sector, Industries Cloud, Salesforce

People Prefer Digital Channels for Transactional Engagements

Category	In person	Over the phone	Online via laptop or desktop computer	Online via mobile device or tablet
Manage change-of-life events	55%	19%	30%	13%
Apply for/renew a passport or visa	54%	14%	33%	13%
Applying for and tracking status of authorizations	39%	20%	43%	18%
Applying for and tracking government benefits	32%	24%	46%	20%
Paying a fee or fine	31%	16%	47%	23%
Managing tax return	31%	14%	52%	17%
Scheduling waste pickup	28%	40%	29%	14%
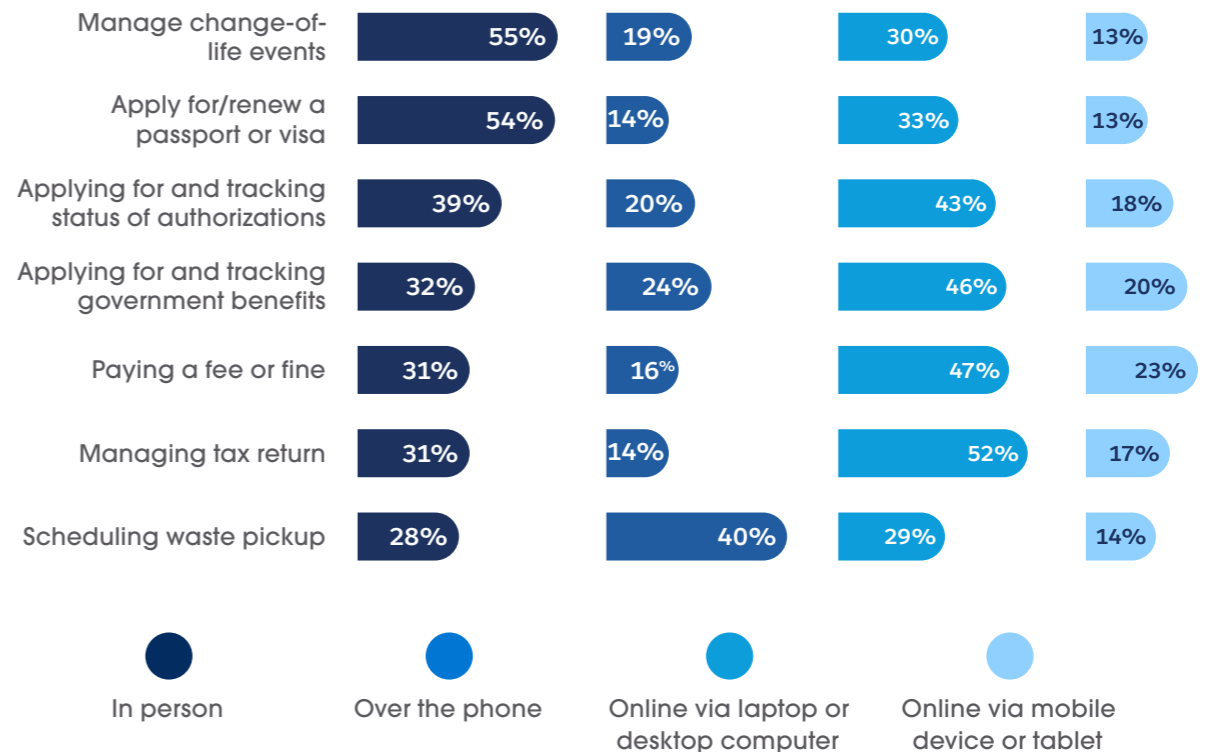
Accessing services: The majority of customers only lean toward in-person engagements for less frequent, high-touch "milestone moments" and prefer going online when it comes to more frequent, lower-touch interactions such as managing tax returns, paying fees or fines, or applying for and tracking benefits.

*Data on this page refers to respondents in Wave 1 (see appendix).

03 Technology Powers Transformation

Despite the improvements in online accessibility made during the pandemic, the lived experiences of many public sector customers reflect a gap in the governments' intent to improve customer experiences and the customer perception of the government commitment to these goals.

Only 18% of people surveyed believe the customer experience is prioritized in their engagements with government.

The digital age has brought with it new opportunities and challenges for governments around the world in that digital tools have enabled government organizations to be more efficient and effective in their operations.

Great customer experiences build trust, and customers believe that government has the biggest opportunity to improve customer experiences with technology.

Data on this page refers to "State of the Connected Customer," Salesforce Research, May 2022, unless otherwise noted.

Respondents Who View the Following Industries as Successful at Using Technology to Create Great Customer Experiences
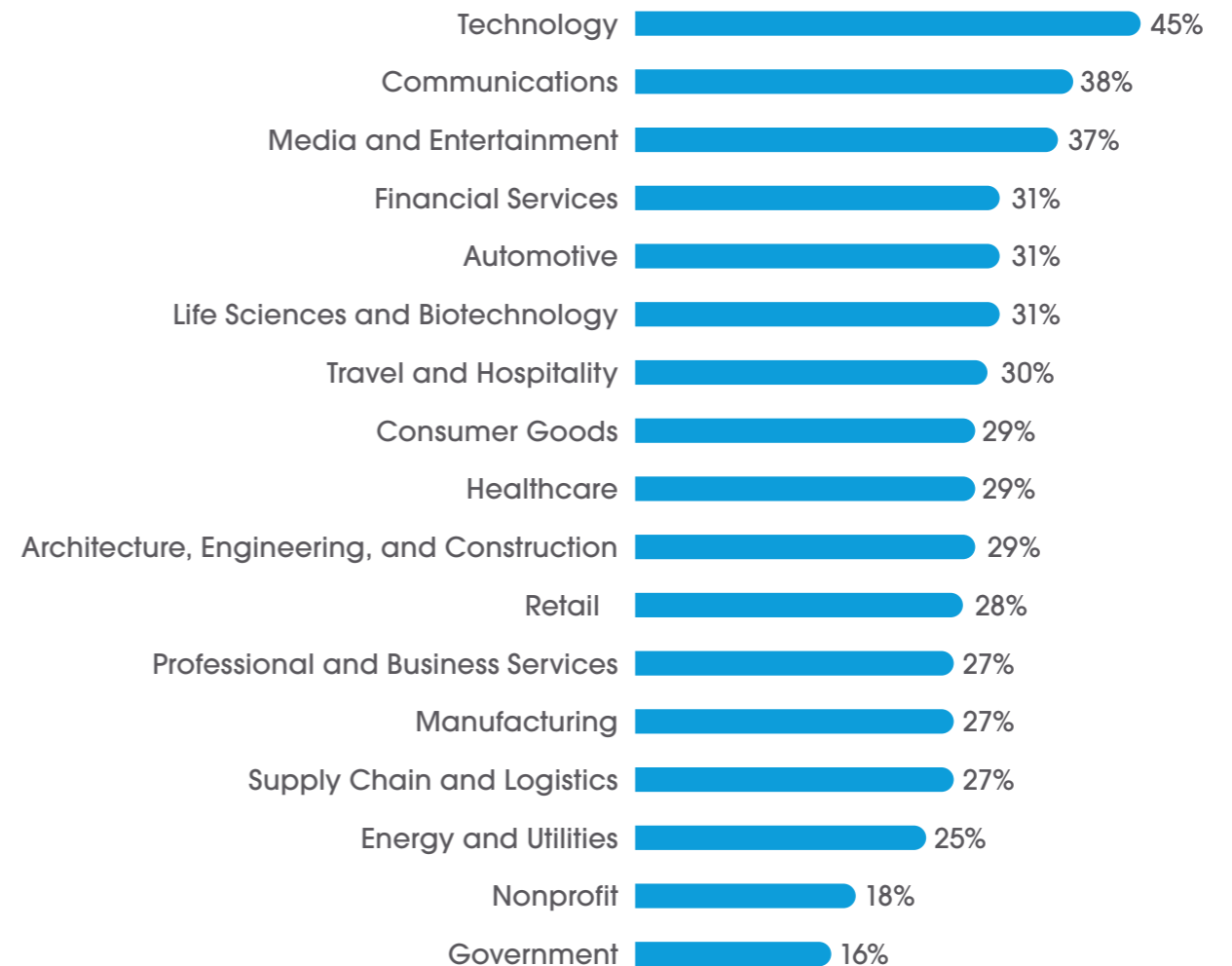
Industry	Percentage
Technology	45%
Communications	38%
Media and Entertainment	37%
Financial Services	31%
Automotive	31%
Life Sciences and Biotechnology	31%
Travel and Hospitality	30%
Consumer Goods	29%
Healthcare	29%
Architecture, Engineering, and Construction	29%
Retail	28%
Professional and Business Services	27%
Manufacturing	27%
Supply Chain and Logistics	27%
Energy and Utilities	25%
Nonprofit	18%
Government	16%

*Data on this page refers to respondents in Wave 4 (see appendix).

04 Investment in the Employee Experience Pays Off, for Everyone

To best serve their customers, government organizations have an opportunity to take a holistic view of digital transformation, one that encompasses both the digital front-end customer experience (CX) and the digital back-end employee experience (EX).

Forty-one percent of people believe there is a direct link between the government employee experience (that is, the way in which employees internalize and interpret the interactions they have with their organization) and customer experience. Unfortunately, **forty-seven percent of people feel that government employees lack the necessary tools to serve the public.**

The key takeaway here is that transformative CX isn't created by technology alone; government employees are a critical aspect in the customer experience. And with the demand for digital skills continually increasing, public sector organizations have a key role to play in addressing the widening skills gap in their workforce.

An Investment in the Employee Experience Is an Investment in the Customer Experience
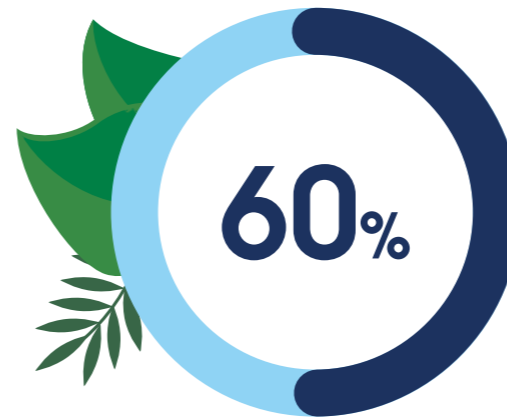
60% think government needs to modernize how it delivers services to customers (for example, use newer technology to deliver services)

"Constituent experience and government employee experiences go hand in hand. An investment in tools and platforms that provide improved business productivity and employee productivity will yield a workforce with higher morale and a desire to stay, which, ultimately, provides better constituent outcomes."

 - **Nasi Jazayeri,** EVP & General Manager, Public Sector, Industries Cloud, Salesforce

*Data on this page refers to respondents in Wave 5 (see appendix).

4.1

Spotlight: The Future of Work Is Digital

According to the Global Digital Skills Index, 73% of the workforce doesn't feel "very equipped" with the resources needed to learn the digital skills required to succeed now.

The overall global score for digital readiness, which measures workforce readiness to work in a digital-first environment, is only 33 out of 100.

Making investments in the right technology, promoting ongoing employee development, and embracing existing learning communities will not only ensure public sector organizations' ability to make significant progress on digital transformation initiatives, but it will also boost employee performance and satisfaction.

By equipping employees with the tools and skills they need to keep pace with modern demands, public sector organizations have an opportunity to empower workers to consistently deliver exceptional experiences to customers. This investment has the potential to pay off in the form of happier, more productive employees and satisfied customers.

73% of the workforce doesn't feel "very equipped" with the resources needed to learn the digital skills required to succeed now.
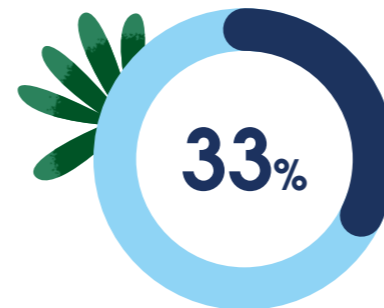
33% Global Digital Skills Readiness Index Score (out of 100)

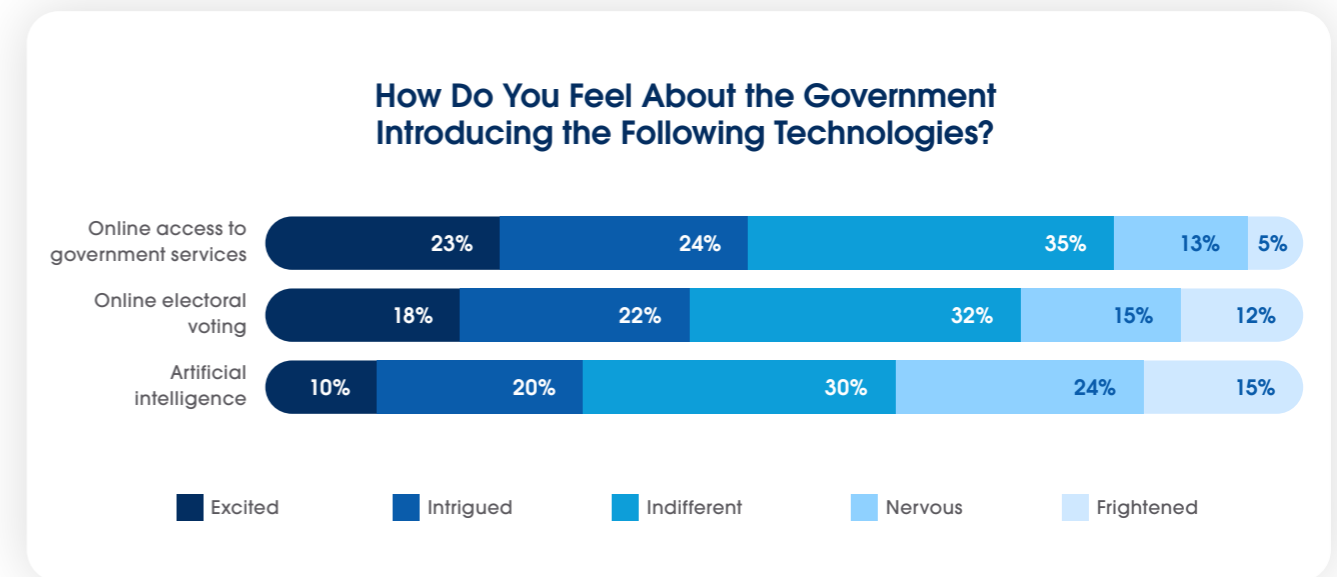Data on this page refers to "Global Digital Skills Index," Salesforce Research, January 2022.

05

Look Ahead: Emerging Tech and the Future of the Digital Public Sector

Emerging technologies bring new opportunities for creating trusted experiences. The introduction of leading-edge technologies presents an opportunity to improve the way customers engage with their governments. Emerging technologies – like artificial intelligence (AI) and blockchain – have the potential to create new opportunities for government organizations to interact with customers in ways that are more personal, efficient, and secure.

For example, AI can be used to automate repetitive tasks, like data entry, which can free up staff time to focus on more complex issues. Additionally, AI-powered chatbots can provide 24/7 self-service support for citizens who need assistance outside of normal business hours.

Drone technology has strong potential to help public sector organizations improve their efficiency by reducing the need to deploy human resources to perform remote, hazardous, or particularly arduous tasks, for example, infrastructure inspections, monitoring high-risk situations, or surveying large geographic areas. Similarly, the IoT can be used to collect data from connected devices – like sensors and cameras – which can be used to improve public safety, provide situational awareness during natural disasters, optimize traffic flow, and more.

The vast majority of people expressed openness to the idea of introducing new or enhanced technologies to government services. Still, there are substantial populations that express a reticence or an outright fear of emerging tech being applied to certain use cases, which presents an opportunity to influence sentiment by building trust.

How Do You Feel About the Government Introducing the Following Technologies?

Technology	Excited	Intrigued	Indifferent	Nervous	Frightened
Online access to government services	23%	24%	35%	13%	5%
Online electoral voting	18%	22%	32%	15%	12%
Artificial intelligence	10%	20%	30%	24%	15%

As as cited in this report, trust has strong influence on people's willingness to engage with government in a variety of ways. To that end, closing the trust gap has the potential to put public sector organizations in a more favorable position to harness the full scope of available technology to transform their digital service delivery models and define what a digital-first future could potentially look like.

*Data on this page refers to respondents in Wave 2 (see appendix).

Appendix

06 How have you primarily managed the following government interactions?

People Prefer Digital Channels for Transactional Engagements

	In person	Over the phone	Online via laptop or desktop computer	Online via mobile device or tablet
Manage change-of-life events	55%	19%	30%	13%
Apply for/renew a passport or visa	54%	14%	33%	13%
Applying for and tracking status of authorizations	39%	20%	43%	18%
Applying for and tracking government benefits	32%	24%	46%	20%
Paying a fee or fine	31%	16%	47%	23%
Managing tax return	31%	14%	52%	17%
Scheduling waste pickup	28%	40%	29%	14%
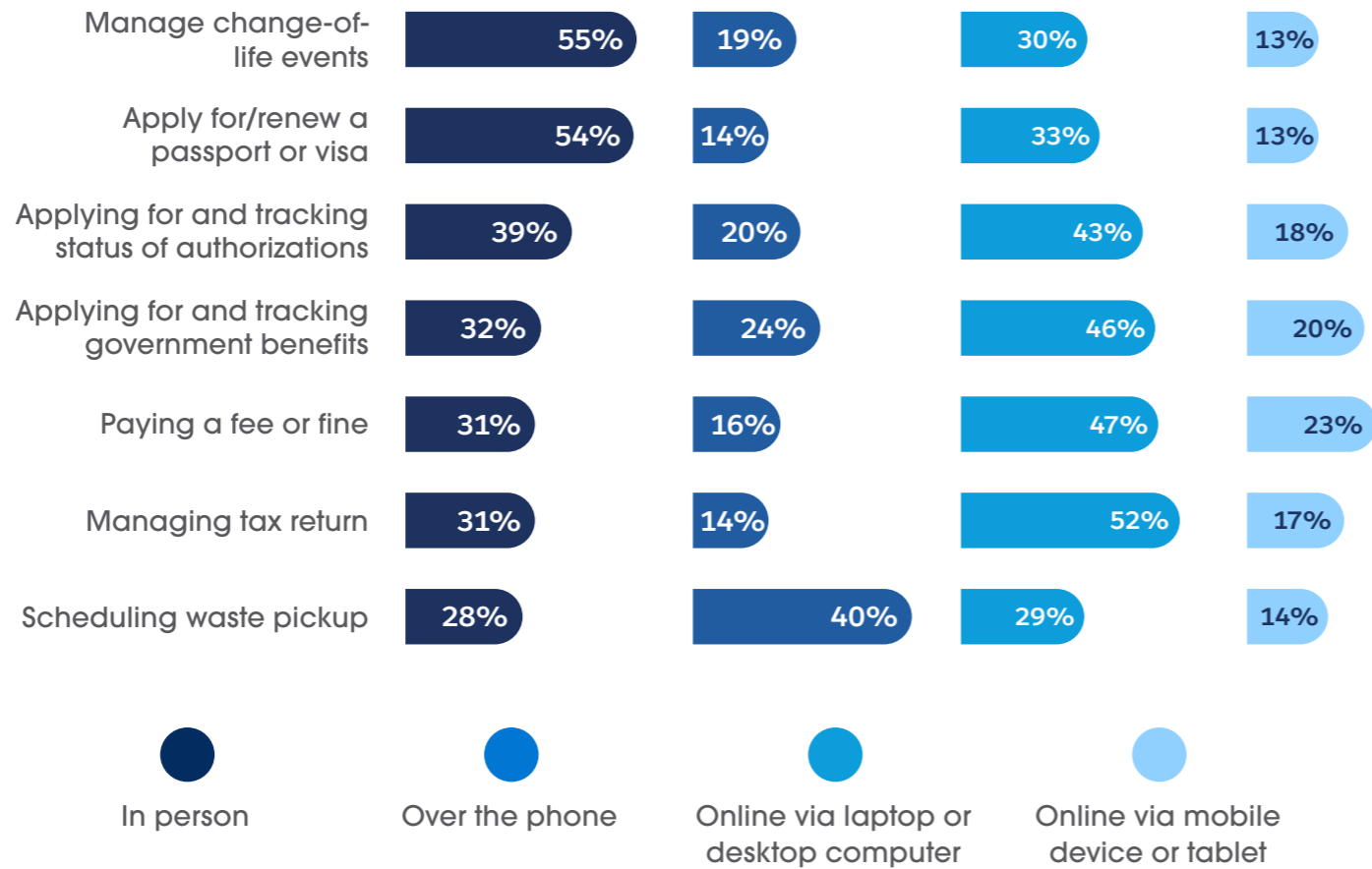
Gen Z more partial to mobile device and phone overall

*Data on this page refers to respondents in Wave 1.

06 How do you feel about governments introducing the following technologies?

	Excited	Intrigued	Indifferent	Nervous	Frightened
Online access to government services	23%	24%	35%	13%	5%
Online electoral voting	18%	22%	32%	15%	12%
Citizen ID cards	16%	18%	39%	17%	9%
Face recognition technology/cameras	11%	20%	31%	23%	16%
Artificial intelligence	10%	20%	30%	24%	15%
Citizen database	9%	17%	36%	23%	16%

● Excited ● Intrigued ● Indifferent ● Nervous ● Frightened
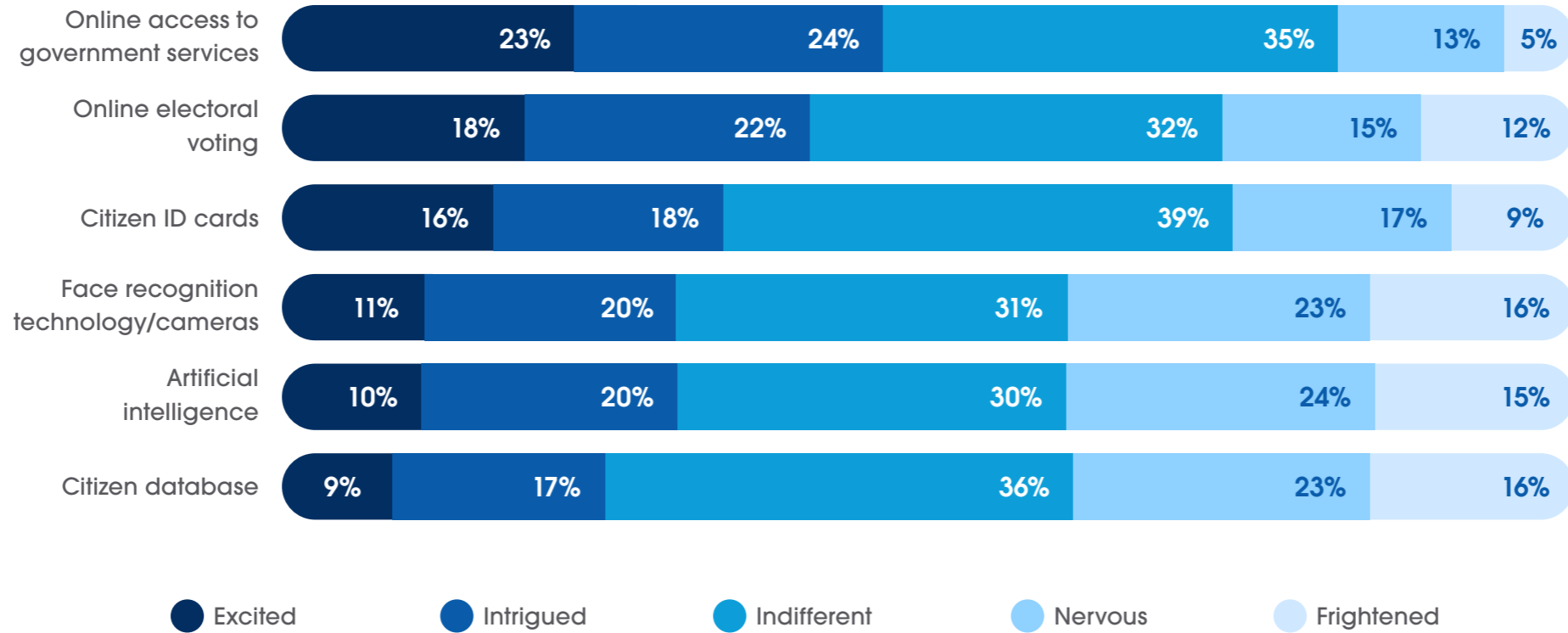
*Data on this page refers to respondents in Wave 2.

06

Which of the following should governments consider when hiring private sector companies?

Trust	**60%**
Price	**50%**
Constituent data privacy	**48%**
Sustainability (e.g., environmental impact)	**36%**
Economic equality	**34%**
Other (please specify)	**2%**

*Data on this page refers to respondents in Wave 3.

06 Which statements best describe your views of business and government actions during the pandemic?

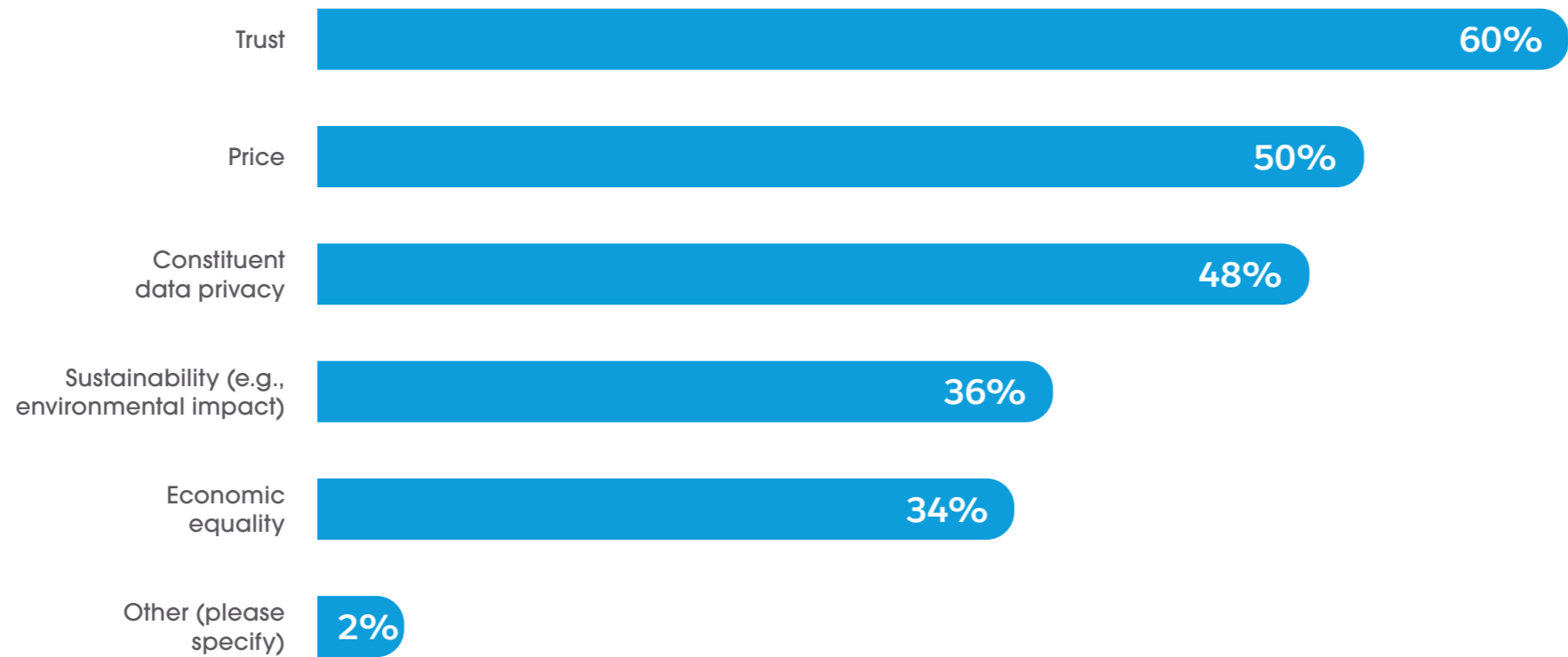|		
I trust business to do the right thing	**62%** / **38%**	I do not trust business to do the right thing
I trust my government to do the right thing	**47%** / **53%**	I do not trust my government to do the right thing
The pandemic has changed the way government delivers services	**74%** / **26%**	The pandemic has not changed the way government delivers services
The pandemic has made the government more resilient	**47%** / **53%**	The pandemic has made the government less resilient
The pandemic has made business more resilient	**57%** / **43%**	The pandemic has made business less resilient
I trust government to protect my personal data	**53%** / **47%**	I do not trust government to protect my personal data
I trust business to protect my personal data	**45%** / **55%**	I do not trust business to protect my personal data
Government has better customer service than other industries	**31%** / **69%**	Government has worse customer service than other industries
The government has the tools it needs to help me	**53%** / **47%**	The government does not have the tools it needs to help me
It's easier to get help from the government online	**54%** / **46%**	It's easier to get help from the government in person

*Data on this page refers to respondents in Wave 3.

06

Where are you most likely to seek information about a public service (e.g., trash pickup, vaccinations, etc.)?

Visiting a government website
- 45%
- 50%
- 51%

Using a search engine
- 43%
- 47%
- 47%

Calling a government office
- 24%
- 21%
- 24%

Consulting family or friends
- 21%
- 22%
- 23%

Consulting a private webpage
- 15%
- 15%
- 18%

Visiting a government office
- 16%
- 16%
- 17%

Consulting social media
- 15%
- 13%
- 14%

Other (please specify)
- 1%
- 1%
- 1%

● Wave 1

● Wave 2

● Wave 3

*Data on this page refers to respondents in Wave 3.

06
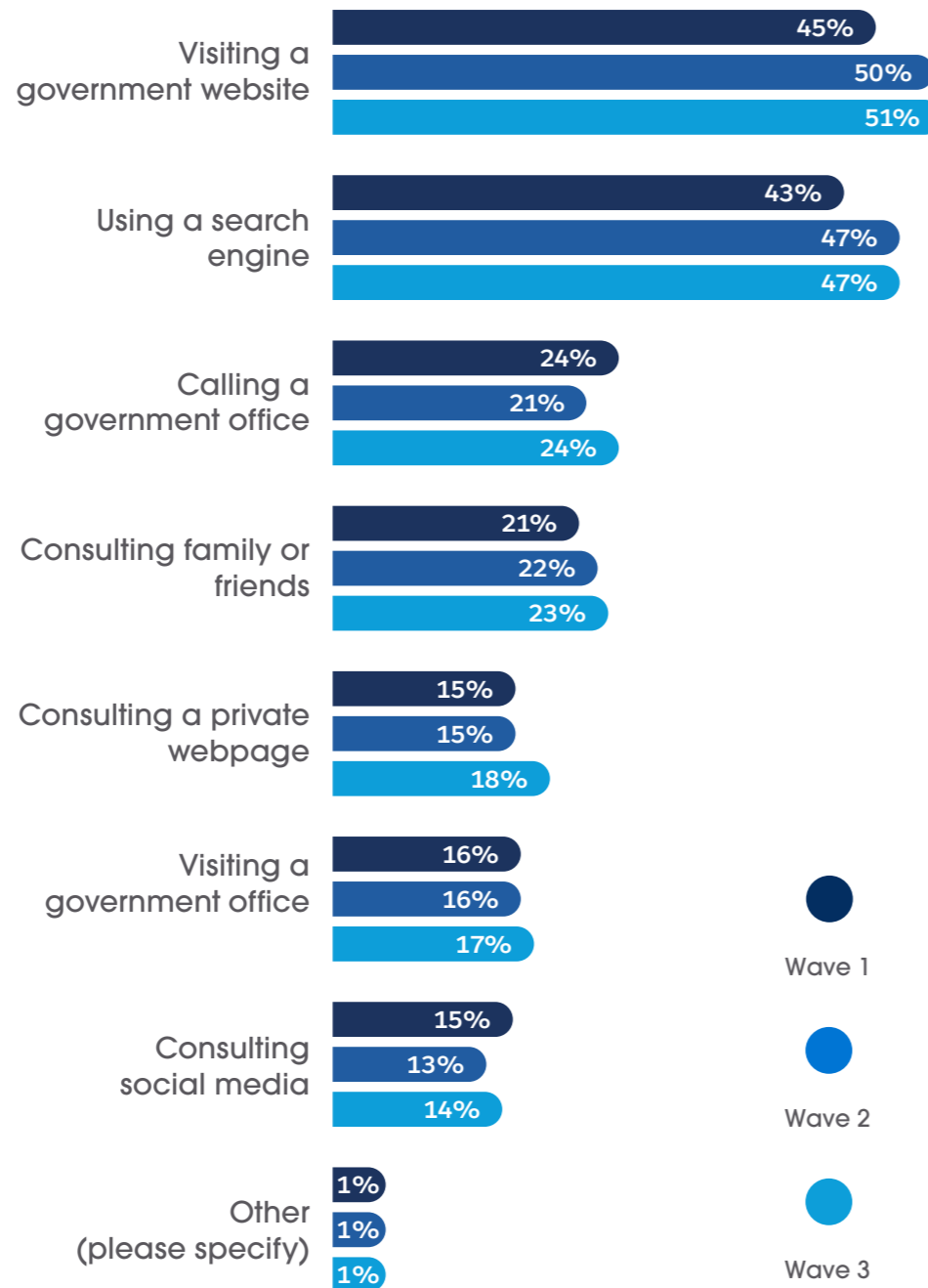
Which statements describe your experiences with city/local or national government?

None of these describes my experience with city/ local/national government — 41% / 46%

Makes constituents feel important — 21% / 21%

Cares about my experience — 19% / 17%

Wants my feedback on how to improve the constituent experience — 24% / 21%

Responds efficiently to change needs — 27% / 26%

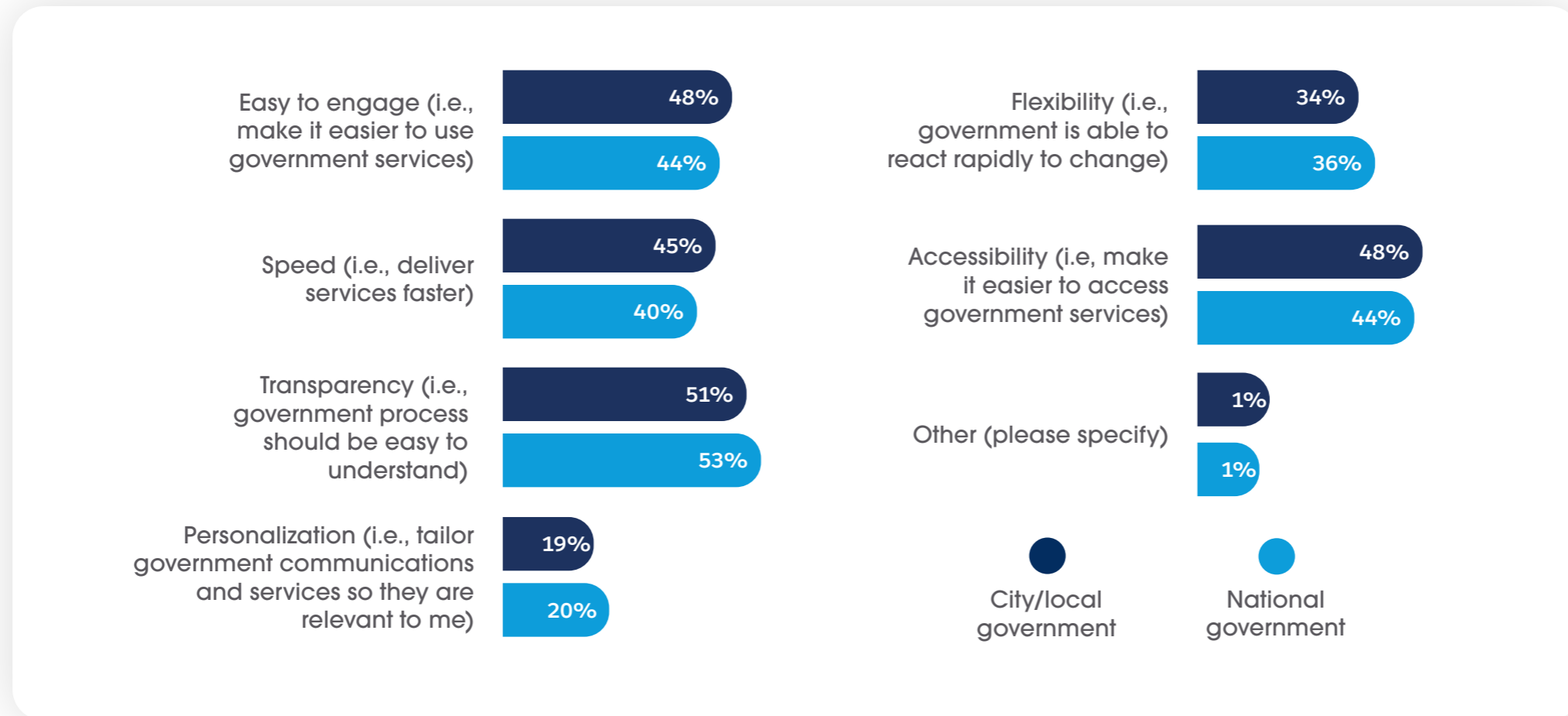● City/local government

● National government
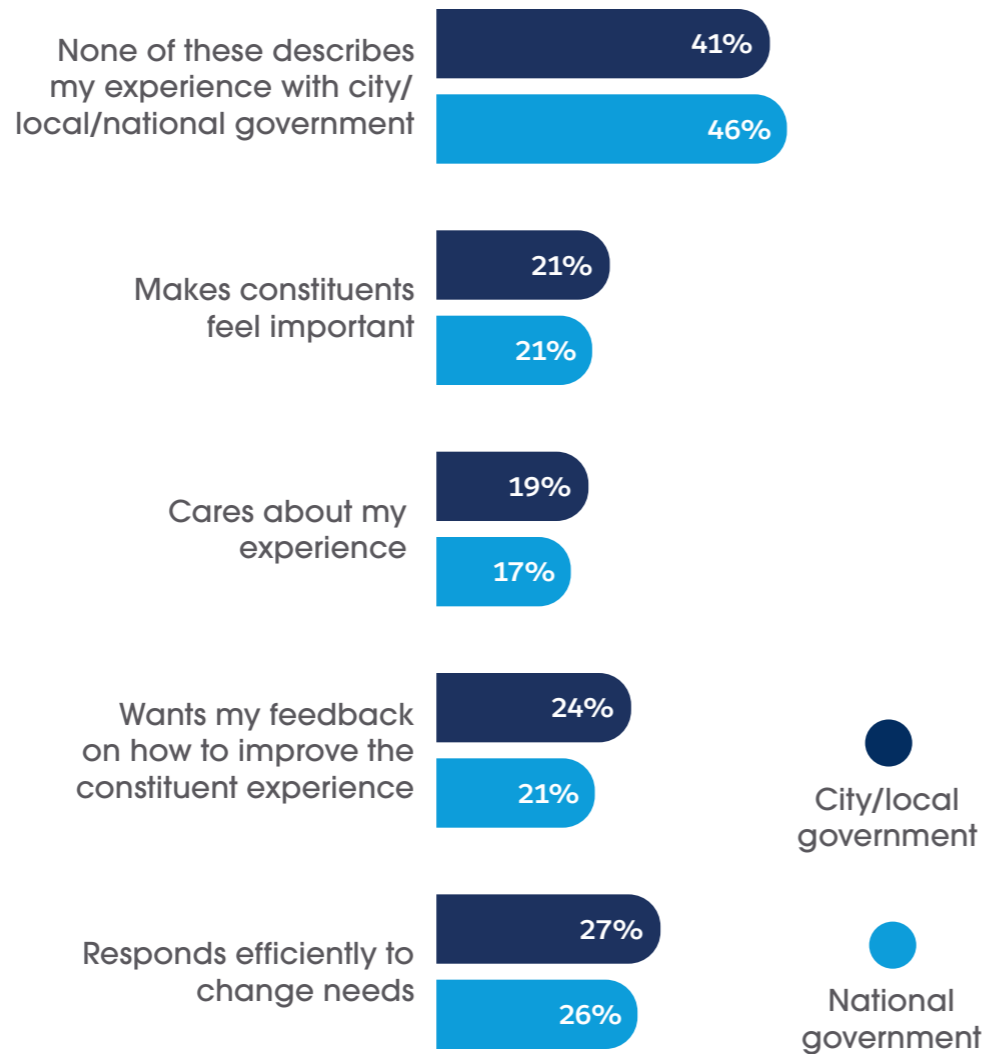
*Data on this page refers to respondents in Wave 4.

06

Which attributes are most important for building trust in your city/ local or national government?

Easy to engage (i.e., make it easier to use government services)
- 48%
- 44%

Speed (i.e., deliver services faster)
- 45%
- 40%

Transparency (i.e., government process should be easy to understand)
- 51%
- 53%

Personalization (i.e., tailor government communications and services so they are relevant to me)
- 19%
- 20%

Flexibility (i.e., government is able to react rapidly to change)
- 34%
- 36%

Accessibility (i.e, make it easier to access government services)
- 48%
- 44%

Other (please specify)
- 1%
- 1%

● City/local government

● National government

*Data on this page refers to respondents in Wave 4.

06 Generally speaking, to what extent do you trust your government to act in the public's best interest?

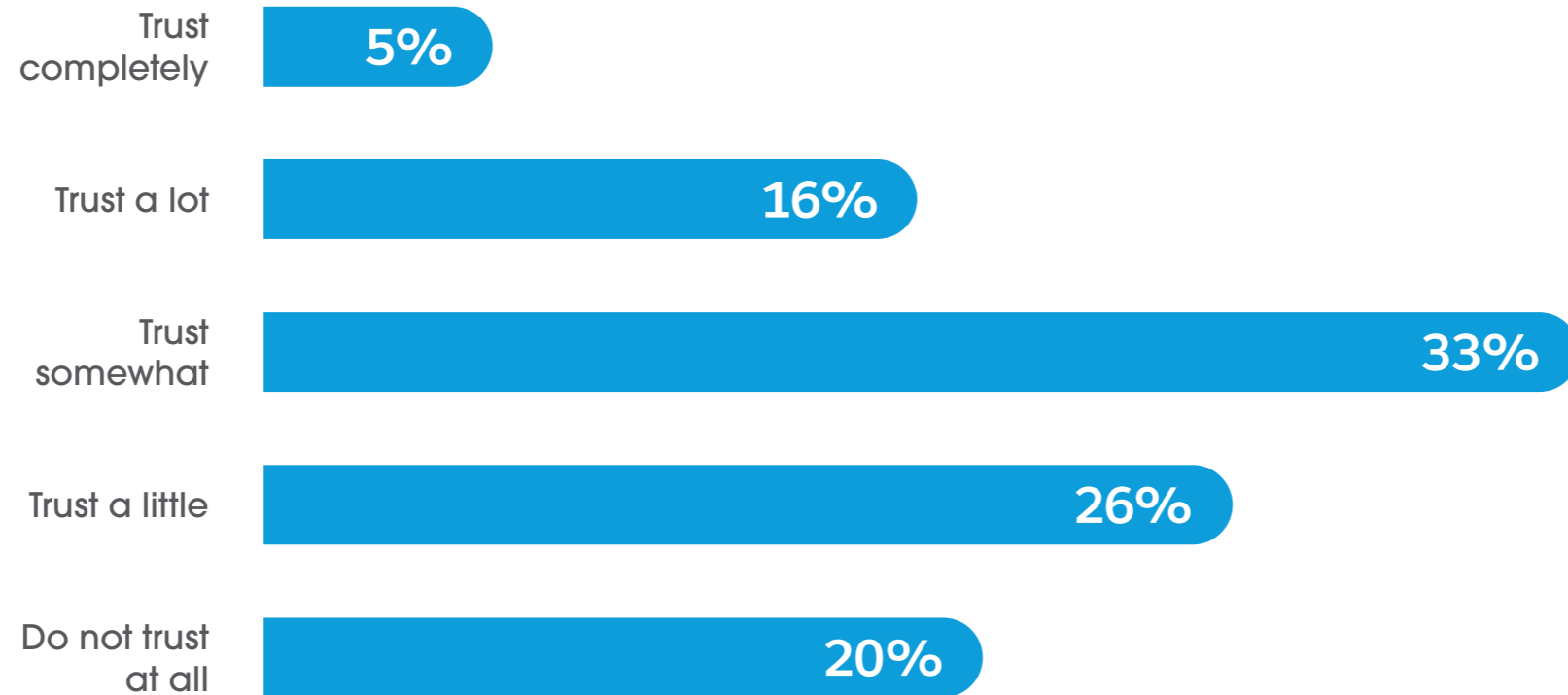|	
Trust completely	5%
Trust a lot	16%
Trust somewhat	33%
Trust a little	26%
Do not trust at all	20%

*Data on this page refers to respondents in Wave 5.

06 **Generally speaking, to what extent do you trust your government to act in the public's best interest?**

● Trust completely   ● Trust a lot   ● Trust somewhat   ● Trust a little   ● Do not trust at all

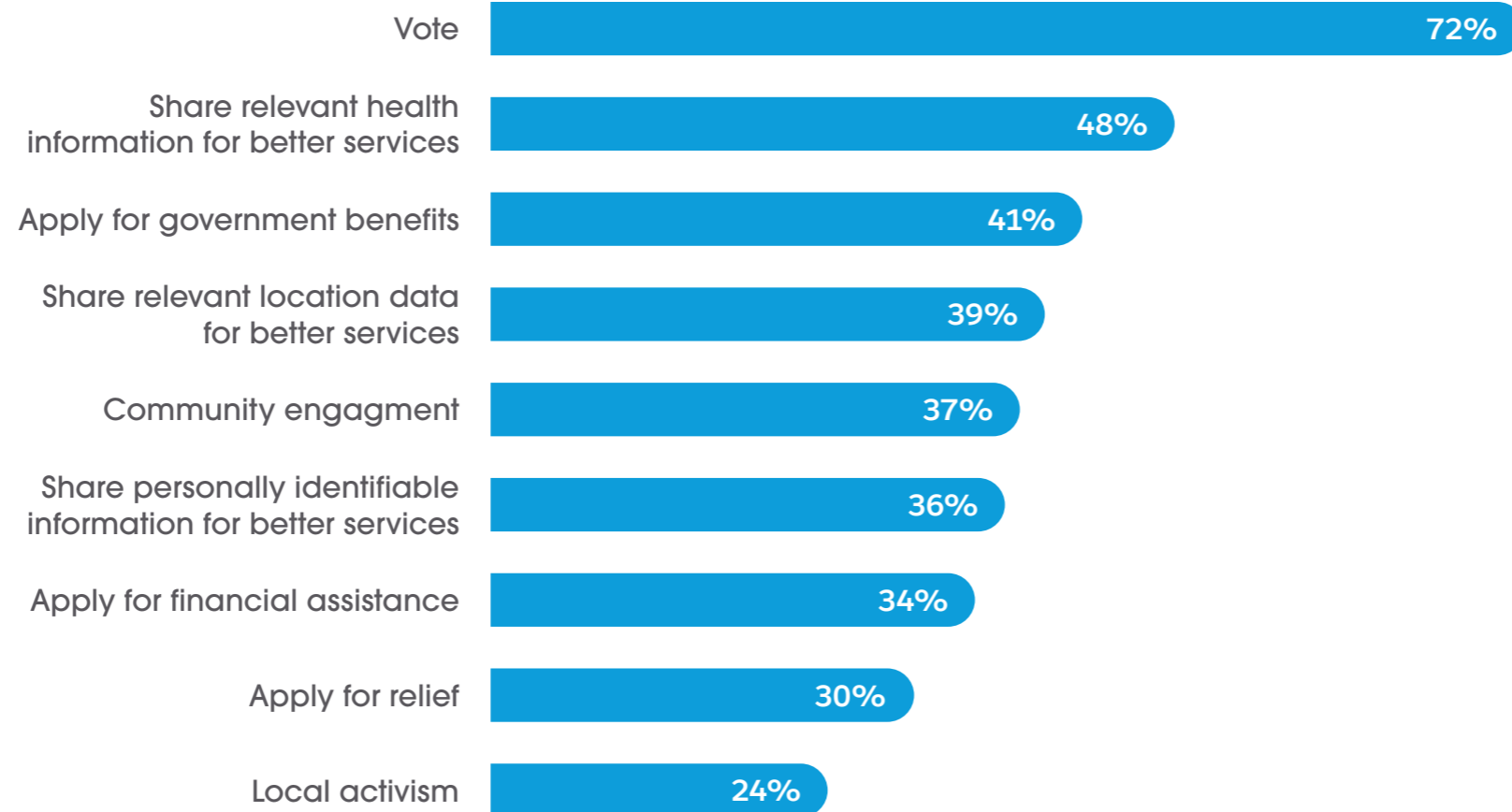|	Trust completely	Trust a lot	Trust somewhat	Trust a little	Do not trust at all
Gen Z	8%	20%	34%	25%	13%
Millennials	6%	15%	33%	27%	19%
Gen X	5%	15%	32%	24%	24%
Boomers	3%	15%	33%	26%	22%
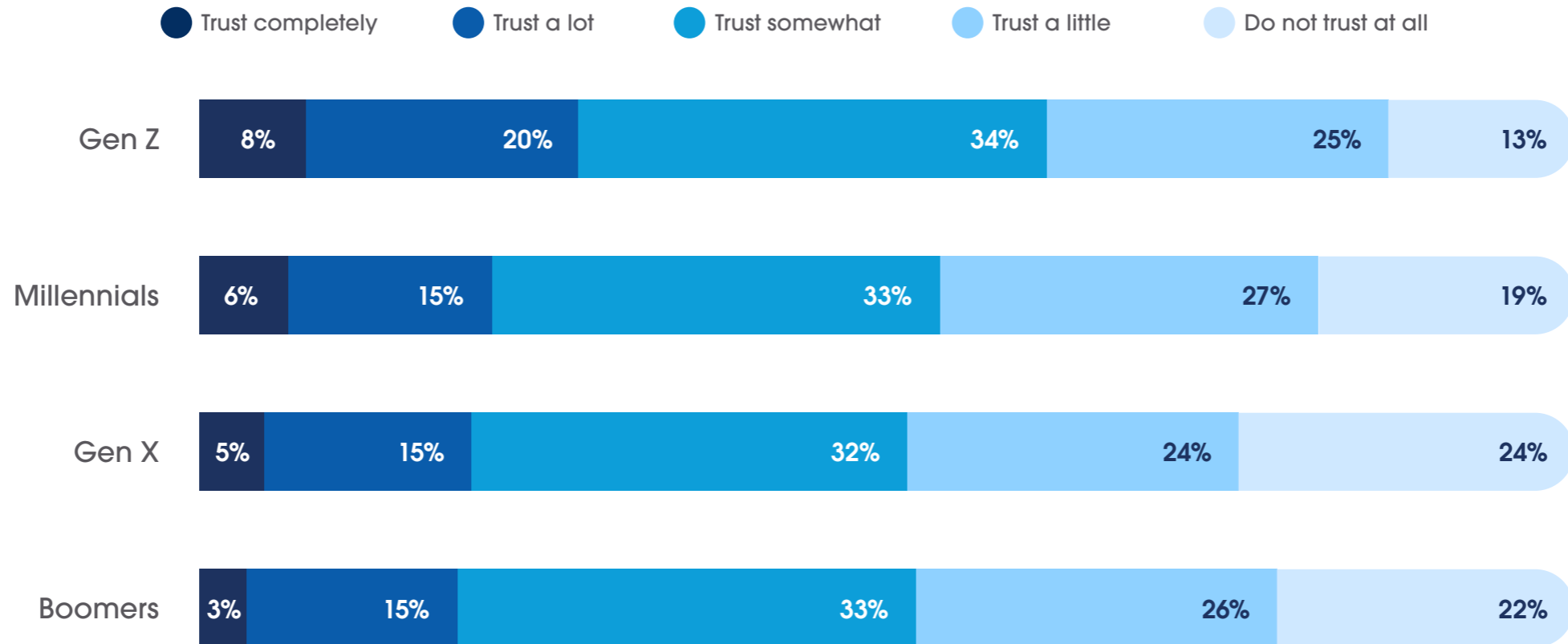
*Data on this page refers to respondents in Wave 5.

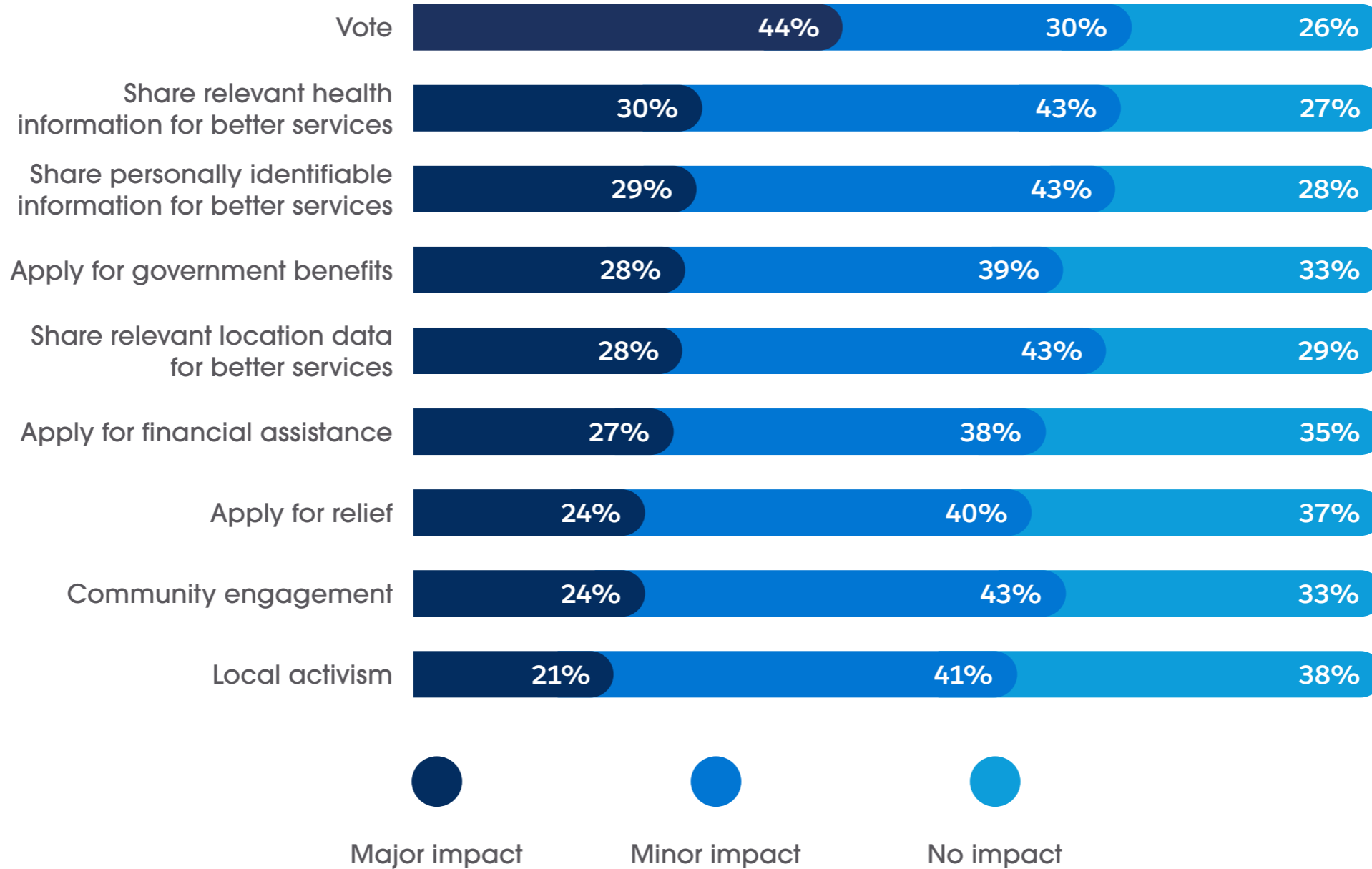## 06 How likely are you to engage with your government in the following ways?

Vote	72%
Share relevant health information for better services	48%
Apply for government benefits	41%
Share relevant location data for better services	39%
Community engagment	37%
Share personally identifiable information for better services	36%
Apply for financial assistance	34%
Apply for relief	30%
Local activism	24%

*Data on this page refers to respondents in Wave 5.

06

Impact of Trust on Constituent Behavior

Behavior	Major impact	Minor impact	No impact
Vote	44%	30%	26%
Share relevant health information for better services	30%	43%	27%
Share personally identifiable information for better services	29%	43%	28%
Apply for government benefits	28%	39%	33%
Share relevant location data for better services	28%	43%	29%
Apply for financial assistance	27%	38%	35%
Apply for relief	24%	40%	37%
Community engagement	24%	43%	33%
Local activism	21%	41%	38%

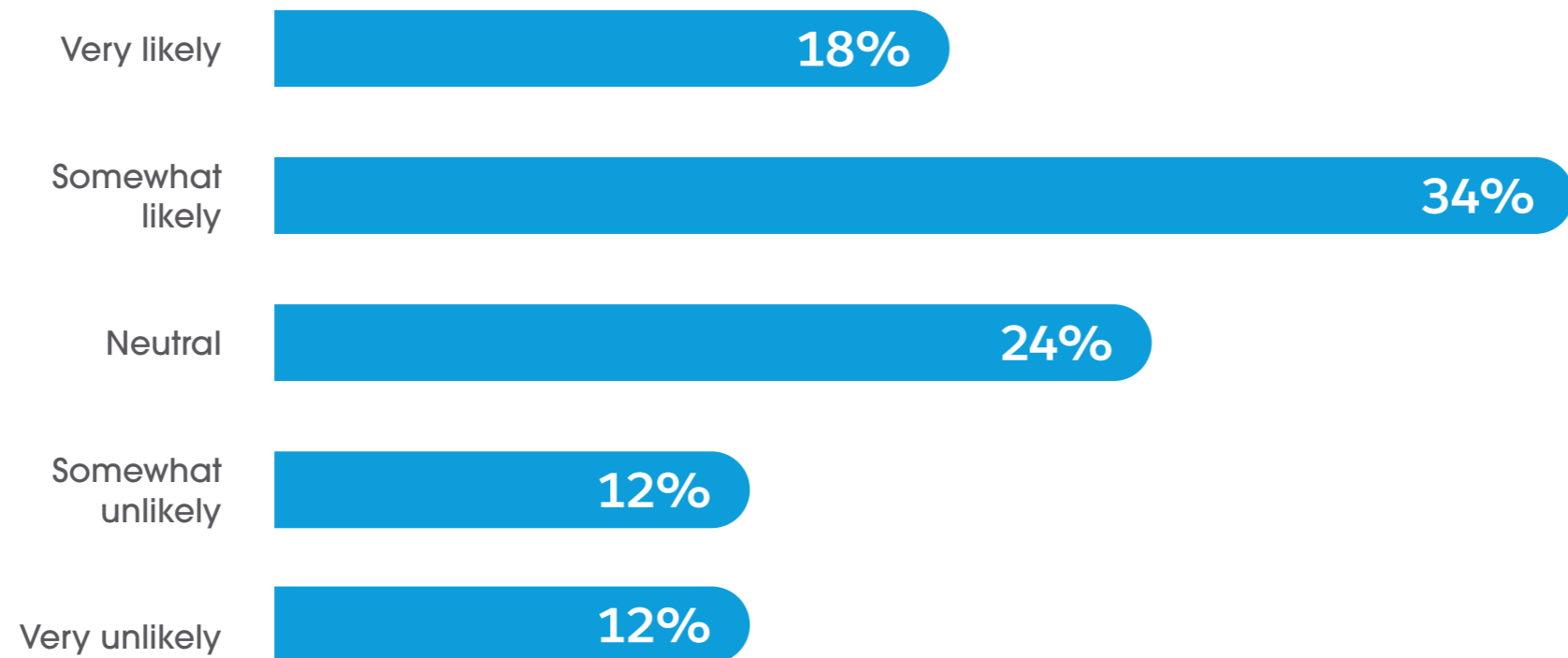● Major impact   ● Minor impact   ● No impact

*Data on this page refers to respondents in Wave 5.

06

How likely are you to use new technologies to engage with the government (e.g., try voting online, AI-powered benefits claims, chatbots to answer my questions)?

Response	Percentage
Very likely	18%
Somewhat likely	34%
Neutral	24%
Somewhat unlikely	12%
Very unlikely	12%

*Data on this page refers to respondents in Wave 5.

06 **How much impact does your trust in government have on how likely you are to use new technologies to engage with government (e.g., try voting online, AI-powered benefits claims, chatbots to answer my questions)?**
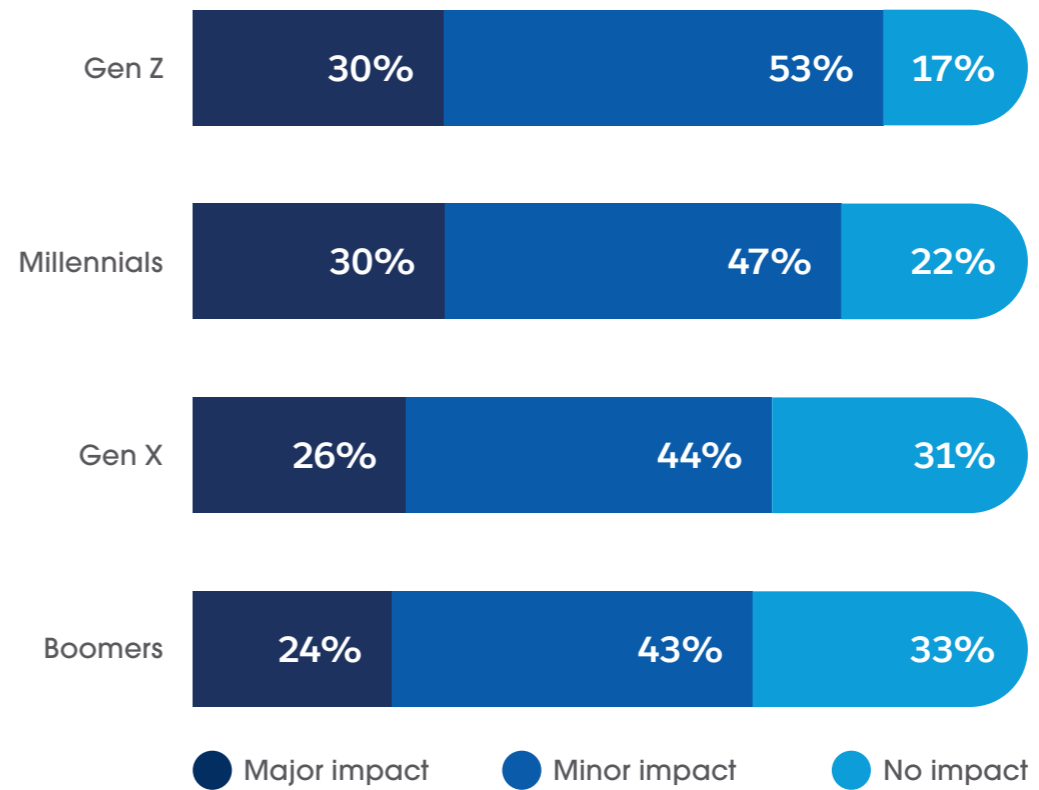
Major impact — 27%

Minor impact — 46%

No impact — 27%

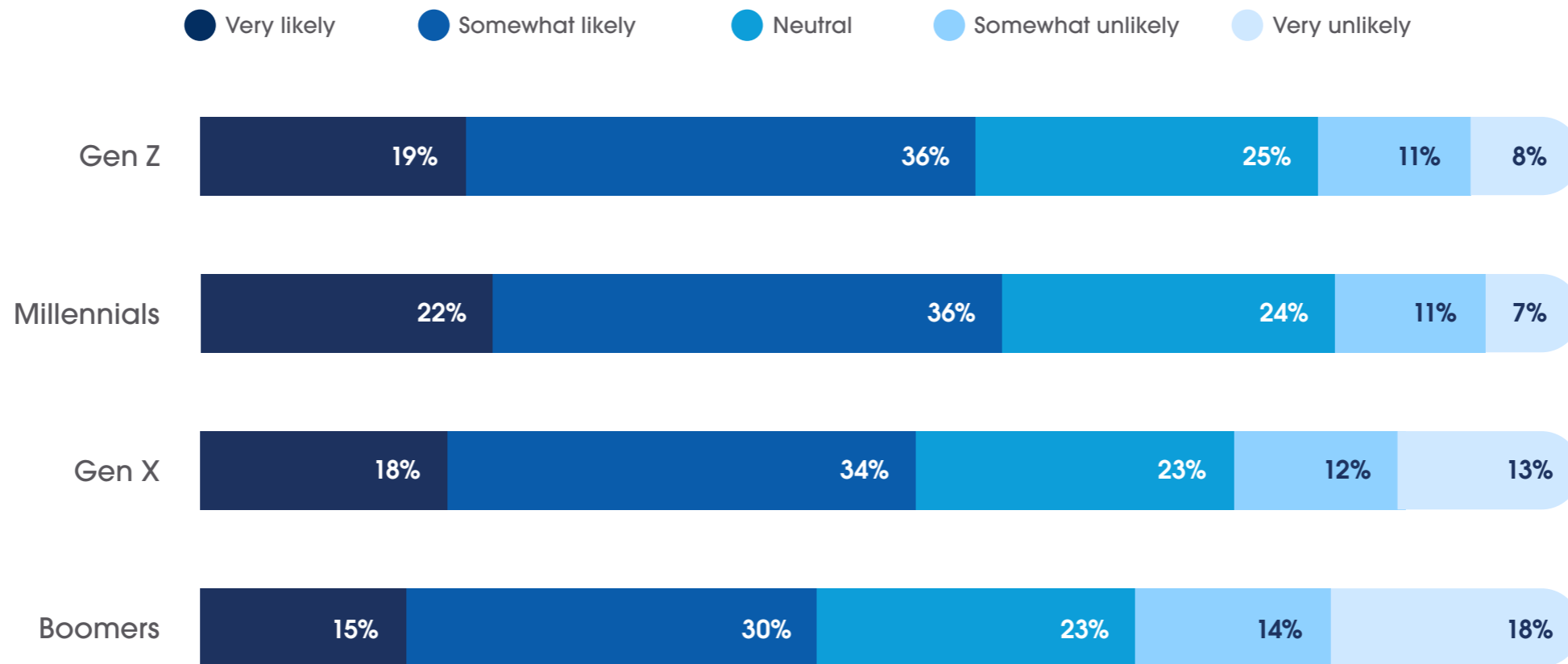|	Major impact	Minor impact	No impact
Gen Z	30%	53%	17%
Millennials	30%	47%	22%
Gen X	26%	44%	31%
Boomers	24%	43%	33%

*Data on this page refers to respondents in Wave 5.

06 How likely are you to use new technologies to engage with the government (e.g., try voting online, AI-powered benefits claims, chatbots to answer my questions)?

● Very likely ● Somewhat likely ● Neutral ● Somewhat unlikely ● Very unlikely

Generation	Very likely	Somewhat likely	Neutral	Somewhat unlikely	Very unlikely
Gen Z	19%	36%	25%	11%	8%
Millennials	22%	36%	24%	11%	7%
Gen X	18%	34%	23%	12%	13%
Boomers	15%	30%	23%	14%	18%

*Data on this page refers to respondents in Wave 5.

06

To what extent do you agree or disagree with the following statements? (Agree + Strongly Agree)

My government needs to modernize how it delivers services to constituents (e.g., use newer technology to deliver services) — **60%**

Government employees have the technology they need to help me — **45%**

There is a direct link between government employees' experience (i.e., the way employees internalize and interpret the interactions they have with their organization) and constituent experience — **41%**

My government is well-equipped to keep up with the pace of change (e.g., changes in the economy, changes in societal behaviors, technological advances) — **38%**

My government cares about my opinions even outside of voting cycles — **28%**

Government decisions are made transparently — **28%**

*Data on this page refers to respondents in Wave 5.

Survey Demographics

07 Survey Demographics

Wave 1
5,101 respondents
Field dates: Feb 25 - March 11, 2021

Australia/New Zealand	9%
Brazil	9%
Canada	9%
France	9%
Germany	9%
Japan	9%
Portugal	14%
Spain	9%
United Kingdom	8%
United States	17%

Wave 2
6,077 respondents
Field dates: June 30 - July 19, 2021

Australia/New Zealand	9%
Brazil	8%
Canada	9%
France	9%
Germany	9%
Japan	9%
Portugal	7%
Spain	9%
United Kingdom	9%
United States	22%

Wave 3
11,134 respondents
Field dates: Oct 19 - Nov 1, 2021

Australia/New Zealand	9%
Brazil	8%
Canada	9%
France	9%
Germany	9%
Japan	9%
Portugal	8%
Spain	9%
United Kingdom	9%
United States	19%

Wave 4
5,574 respondents
Field dates: Mar 8 - Mar 18, 2022

Australia/New Zealand	10%
Brazil	9%
Canada	9%
France	9%
Germany	9%
Japan	10%
Portugal	7%
Spain	9%
United Kingdom	9%
United States	18%

Wave 5
8,000 respondents
Field dates: June 3 - June 27, 2022

Australia	13%
Canada	13%
France	13%
Germany	13%
New Zealand	13%
United Kingdom	13%
United States	25%