publicis sapient

Digital Citizen Report 2024

‘No Citizen Left Behind’

Delivering Exceptional Digital Services for Every Australian

Citizen Insights Hub





Foreword

Is the Australian Government's Digital Agenda on Track?

That's the question we set out to answer every year in our Digital Citizen Report, now entering its third instalment. And put simply, the answer is 'yes'. We've seen significant progress in uptake and satisfaction of government digital services since Publicis Sapient began running this survey – such as the 13-percentage-point increase in myGovID users from 2023 to 2024.

But while these overarching stats show that the government's digital strategy is working, they can obscure the detailed picture hidden deeper in the data. For example, although overall digital service adoption is improving, our research shows a participation gap between demographic groups based on their financial situations. We noted this divide last year, but in 2024 it was even more prominent, and it is therefore the main theme of this year's report.

We also saw that financial pressure correlated with more cautious attitudes to AI technology, lower trust in government, and greater security and privacy concerns. It raises important questions about the government's digital approach: how do you continue to reassure citizens that their data is safe, encourage them to adopt digital services, improve the quality of those services, and deliver them at scale?

This shouldn't distract from the good work already being done. Australians are broadly satisfied and supportive of the work that the government is doing. Where they can identify areas for improvement, the government should take those perspectives into account to build a stronger, more valuable and flexible digital government for everyone. It isn't a weakness; it's an opportunity to accelerate.



Steven Metzmacher
Industry Lead, Public Sector, Publicis Sapient, ANZ

Key trends

in 2024

1 Australia's 'Digital Divide' is Growing

The number of Australians with precarious finances has increased by 85%. This financial pressure is creating a disparity between the digital experiences of some demographics.

2 The Need for Ethical AI Leadership

55% of Australians would support the use of AI to improve government services – but they need reassurance about risk management and clear governance.

3 Closing the Awareness Gap

Government life-event services are a clear success story, with 93% satisfaction among users. But not everyone is taking advantage. How can the government increase uptake?

4 Trust in Data Protection is Waning

52% of Australians have lost trust in the government around data security and privacy. A refreshed focus on security will reinforce continued progress on digital services.

5 Extending Digital Identity

myGovID makes it easier to access government services, according to 94% of citizens. By expanding myGovID, there's an opportunity to add even more value.



About This Report

The Publicis Sapient Digital Citizen Report is one of the largest annual surveys on digital Government in Australia conducted by a private organisation. It examines how citizens engage with governments through digital services. It was first commissioned and carried out online in late 2021 and has been repeated twice since.

The February 2024 survey included participants from a broad range of demographic groups, reflecting the population of Australia. It offers rich insights on consumer behaviour and citizen-centric services for the public sector.

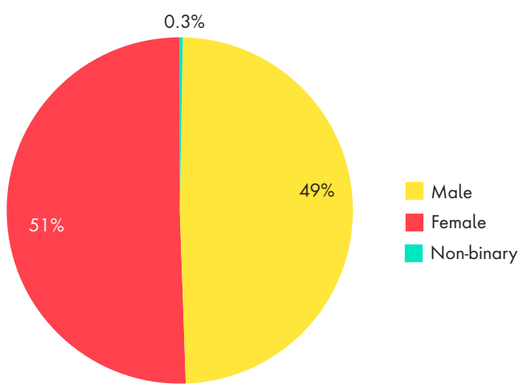
This report aims to:

1. Examine the evolving relationship between citizens and government.
2. Identify gaps in effective delivery of citizen-centric services.
3. Define clear pathways for improved citizen experiences.

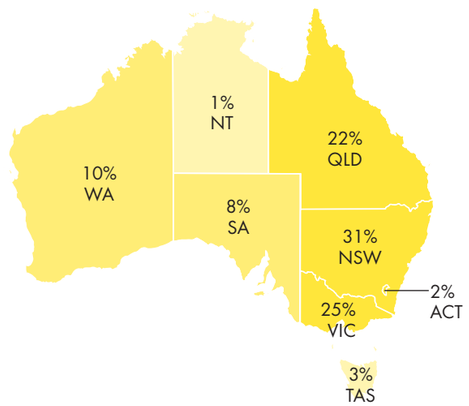
Methodology & Demographics

Our survey focused on customer expectations, experiences and perspectives of Australian citizens in February 2024. It involved 5,061 participants, aiming to give a representative sample of the population along a range of demographic criteria. All figures in this report are rounded to the nearest digit. This rounding means some charts do not sum to exactly 100%.

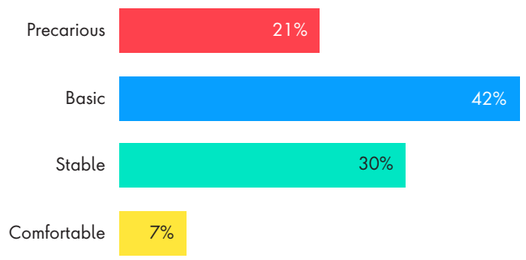
Gender



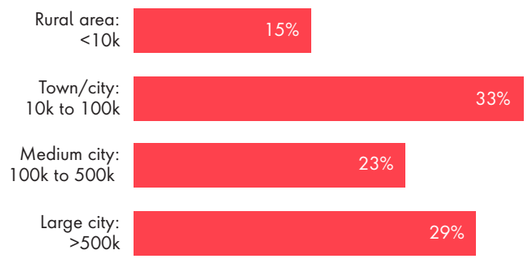
State



Financial situation*



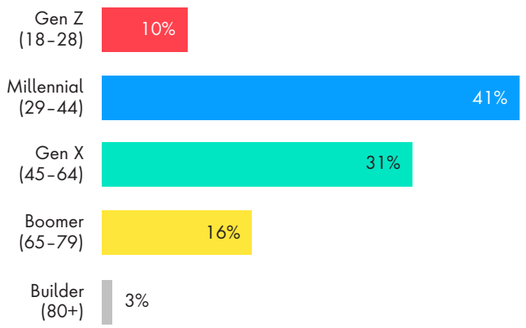
Community size



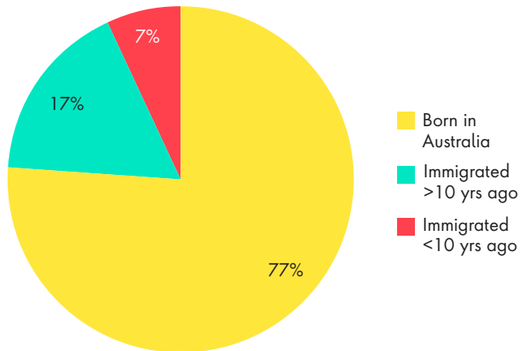
***Definitions:**

- **Precarious**: I have unpaid bills and I am unsure about how I will pay bills. I have debt that will take a long time to pay off.
- **Basic**: I am mostly making ends meet. May have some debt. I don't have any significant savings.
- **Stable**: I am doing fairly well. Bills are paid and I have some savings. Overall, I am in good shape.
- **Comfortable**: My finances allow me to lead a comfortable life.

Age group



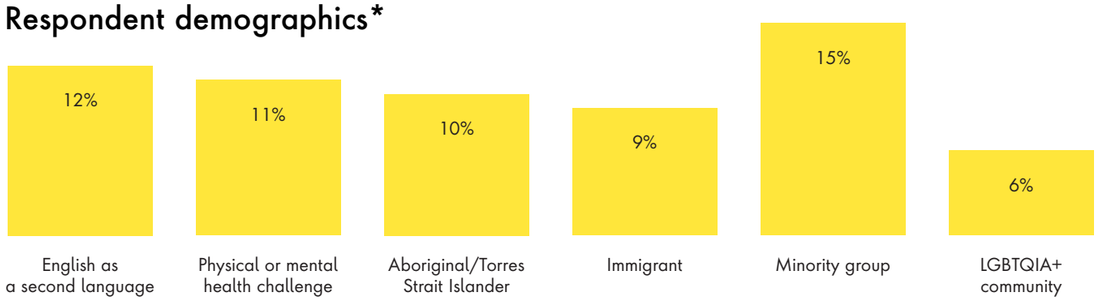
Immigration status



Household income



Respondent demographics*



*Categories do not sum to 100% because this question was multiple choice. We have included a selection of notable minority categories in this chart. 'Minority group' classification is a combination of groups that identify either as; a minority ethnicity/race, having a minority cultural background or belonging to a minority religion.

Setting the Scene



In the 2023 edition of the Digital Citizen Report, our survey was still being conducted under the long shadow of the COVID-19 pandemic. It was a year when Australian government organisations' digital strategies came into maturity; remote working and digital services were no longer a kneejerk reaction to a crisis, but here to stay. We saw improved accessibility, transparency, speed and user-friendliness driving a more permanent shift to digital services, with greater uptake and satisfaction.

In this year's research, the number of people using government services has stayed steady, proportional to the number who have experienced life events. 85% of Australians have used an online service in the past 12 months, compared to 94% in 2022. But this decline reflects a similar reduction in the number of people who have experienced a life event (this declined from 65% to 55% over the same period). The trend may be explained by a short-term spike in the number of life events following the relaxing of pandemic restrictions in 2022.

Overall, the research appears to show positive progress on the government's digital and data strategies, both at state and federal levels. Digital services are becoming a normal part of Australian life. But with the pandemic distinctly in the rear-view mirror, there were two other macro trends in this year's research that had a significant impact on the results. Those were: the impact of inflation and increased cost of living, and the emergence of artificial intelligence (AI) technologies.

Financial Pressures

The number of Australians describing their financial situation in 2023 as precarious has increased by 85%, compared to 2022. Our research shows that has led to a knock-on effect on digital outcomes. Those under financial pressure are significantly less likely to get the help they need: a third (33%) of respondents in households earning less than $100k struggled to find, use or understand online government services. This is compared to just 23% of higher earners. The disparity between higher and lower earners was also borne out in other parts of the research: we saw a roughly 10% gap between higher and lower earners who used myGovID and digital wallets, for example. This digital divide was one of the themes we noted in our 2023 report, but this year we have highlighted it as the overarching trend, due to its wide-ranging impact.

The Rise of AI

ChatGPT had only been publicly available for a few months at the time of our previous survey. In 2024, AI tools are well-established in the public discourse. 40% of Australians have used Generative AI in the last year, and 21% use it on at least a weekly basis. AI has huge potential to improve the way government organisations deliver services, and Australian citizens are broadly cognisant of the benefits. But that enthusiasm is tempered by strong risk perceptions (94% have concerns about AI) and desire for governance and transparency (92% want government regulation of AI). As the technology evolves – and becomes more widespread in society – the need for government to take a strong, responsible stance on AI will become even more urgent.

> “Definitely some [uses] are handy, but I think it's a mistake to give a machine that can think on its own, too much power.”

The Road Ahead

Grappling with these trends is critical to the government's digital service delivery. Get it right, and you have a virtuous circle – more people use the services, more people trust them, more people have positive experiences. While departments are already doing great work on digital services, the job isn't done. Nearly half (49%) of people who experienced a life event in the last 12 months did not use an online service that was available to them. 2023 showed that economic challenges and emerging technologies can quickly disrupt the path of progress. Analysing these trends gives us the opportunity to identify strengths, threats and opportunities, so that government teams can build more accessible, inclusive and seamless experiences, resilient against any further disruption in future.

Australia's 'Digital Divide' is Growing

The great promise of digitalisation in government is that it will allow you to provide simple, secure and connected public services at scale, making sure that more Australians are getting the support they need. But is that how it's playing out in practice?

Our research suggests that there is a 'digital divide' in Australia – and that gap has worsened since 2022. Some groups are benefitting more from digital services, while others – often those who need them most – are struggling to take advantage. We found that there was lower engagement with digital services among the unemployed (16 points lower than employed citizens), lower-income households (11-point disparity), and those without university education (11-point disparity). We also found that those in a precarious financial situation were finding it harder to use services and were less likely to trust the government with their data.



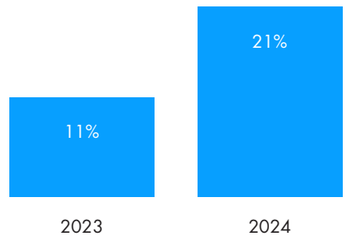
33%
of low-income households struggled to find or use digital services.

...versus just
23%
of households with higher incomes.

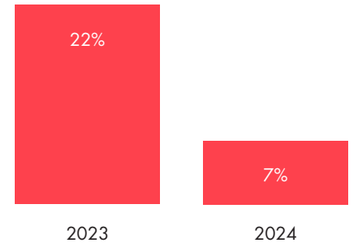
> "It did make it easier although I struggled with ATO stuff. This was very confusing through MyGov."

As the cost-of-living crisis exacerbates financial hardship for many citizens, this gap is going to be felt even more keenly. We asked respondents to describe their financial situation, and found an 85% increase in those who identify their financial situation as 'precarious'. At the same time, respondents self-describing as 'comfortable' dropped by two-thirds (67%). Financial precarity affects Australians at all levels of household income. While households earning under $100,000 per year were more likely to describe themselves as precarious (23%), there were also 17% of households over $100k who reported the same pressure.

Respondents in a 'precarious' financial position



Respondents in a 'comfortable' financial position



Concerningly, citizens on lower incomes have a noticeably worse experience of online government services than higher earners. While this isn't an issue with the quality of services overall – 93% of users are satisfied – it does indicate that experiences may be harder to navigate for those under financial stress.

> "I found it overwhelming – doing while very stressed and upset."

37% of high-income households rated their experience of digital services as 'excellent'

26% of lower earners rated their experience as 'excellent'

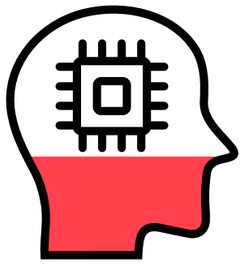
Clearly, the investment in services has been worthwhile. Usage of digital government services is high – across all states and territories. But when people are feeling financial pressure, they are at risk of being left behind. This means the people who could be accessing government services most in their time of need are less likely to get the right support. Inclusivity is a priority for all levels of government: marginalised and vulnerable users need to be considered, to ensure that services are accessible and available for people who can't use digital channels. With the large increase in people feeling financial pressure, this is more important than ever.

The Need for Ethical AI Leadership

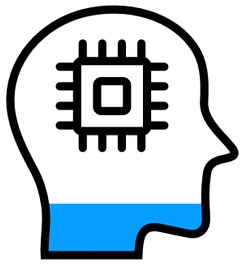
When we last ran the Digital Citizen Report survey in 2023, ChatGPT had only just been released. A year on, Generative AI is now a part of our lives. The Australian public are more aware of the power of AI, and many of them are already using Generative AI tools themselves on a daily or weekly basis (21%). In fact, 40% of Australians have used Generative AI at least once in the last 12 months – a huge rate of adoption for a newly emerged technology.

Perhaps because of this high uptake, Australians are broadly familiar with the benefits of AI. Over three quarters (78%) saw at least one benefit of AI being deployed in government processes, including reduced wait times (44%) and 24-hour support (43%). More than half of Australians (55%) would support extensive usage of AI by the government.





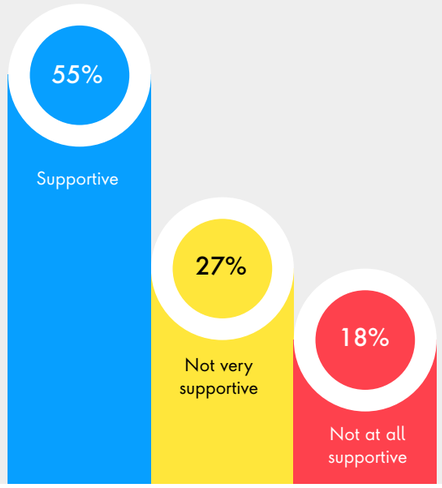
40%
of Australians have used Generative AI (such as ChatGPT) in the past 12 months.



21%
of all respondents use Generative AI daily or weekly.

> “As long as it made communications and outcomes quicker and more positive/efficient for the user, I’d be in favour of it.”

Would you support the government to extensively use AI?



Other use cases which scored highly included navigation and mapping (42%), predictive text and autocorrect (37%), and language translation (33%). AI-driven language translation at scale could be particularly useful for Culturally and Linguistically Diverse (CALD) communities.

> “Especially in high-migration countries like Australia, where English can be a barrier, AI can provide faster solutions with easy translation.”

Support for AI usage was especially high among under-45s (65%), high-income households (62%) and those who are already satisfied with government service following a life-event (65%). These groups are often the more digitally-literate, meaning that – as in the previous section – attitudes to AI in government are inflected by socioeconomic factors. For example, while only 21% of people couldn’t identify a single benefit of AI, this rose among those in rural areas (28%), in lower-income households (27%), and those who had experienced mental health difficulties in the last 12 months (25%).

Although a majority of Australians recognise the potential benefits of AI, 94% had concerns about the risks of AI in government services. These included a preference for speaking with a person (57%), data security and privacy issues (49%), and the potential for job losses (44%).

The risk awareness levels around AI are high, but the benefits are clear for many Australians. There is an opportunity for government to take a stronger leadership role on responsible AI implementation. An overwhelming percentage of Australians would support this – 92% want to see government regulation for AI systems, and 88% want to have at least some transparency regarding AI and government services. 46% wanted full transparency into the code behind the AI. This desire was higher among some of the most concerned groups, such as those with recent mental health struggles (52%) and those with precarious finances (56%).

Although the pressure to deploy AI safely is high, this should be encouraging for government organisations – it is a mandate for strong AI leadership. If there are clear, ethical standards for how AI is being implemented, with honest and transparent communication, it may help to allay public concerns, improve adoption, and realise the potential benefits faster.

Closing the Service Awareness Gap

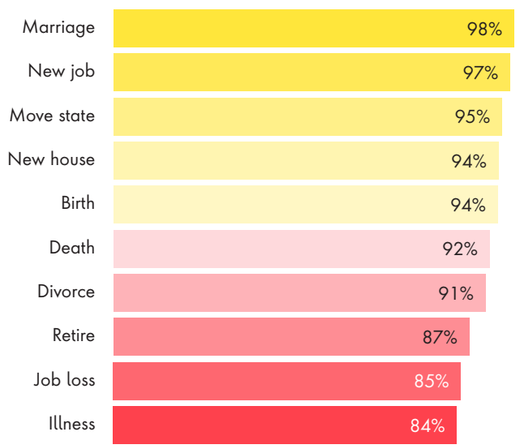
In the twelve months up to February 2024, there was a decline in Australians reported to have experienced a major life event, with only 55% reporting one compared to 65% in the previous year. At the same time, there was a decrease in online service usage, with 85% taking advantage of available services compared to 94% in 2022. This decline may be attributed to abnormally high numbers in 2022 – a 'post-pandemic spike' in births, marriages, job changes and house moves. Unless we see a continued decline in 2025, this decrease in overall service usage doesn't therefore suggest an immediate cause for concern; it seems to represent relatively stable adoption rates.



Examining 'life event services' specifically – i.e. excluding regular online services such as tax, finance and legal services – reveals a high satisfaction rate of 93% among users. Building a connected journey to support life events is complicated, and involves leadership and collaboration between organisations. And it's clear from the research that the government has been making the right moves to improve access, connectedness, and efficiency of digital services.

93%
of people who used digital services following a life event were satisfied

Positive ratings by event type:



Perhaps the biggest issue around online services is that the high satisfaction levels only reflect Australians who have used the services. Our research shows that many Australians did not use (49%) or did not even think to use (36%) the online services available to them following a life event. So while a large majority of citizens are using at least one digital service of some kind, there is still an awareness gap for life-event services specifically.

49%
of people did **not** use online government services for their most recent life event

36%
of people did not even **think** to use online government services

"

Q: Did you use online government services related to this life event?

A: "Online services are irrelevant for these events."

Among service users, financial status once again influences satisfaction levels, with lower earners slightly less satisfied (91%) than higher earners (95%). When prompted, those in precarious financial situations were more likely to identify areas for improvement in digital services. For example, they were more than three times as likely to see room for improvement on housing services (23%), compared to comfortable earners (7%).

Regular users are, understandably, more likely to identify areas for improvement. For example, 34% of people who had experienced mental health issues wanted to see mental health services improved, compared to 9% of those without issues. 37% of people with the Centrelink app would like to see services improved, compared to 24% of the overall population.

This desire for improvement shouldn't be seen as negative feedback on the services; rather, it's an opportunity for deeper listening to citizen experiences. Exploring user feedback can help government bodies to ensure a simple, seamless citizen experience in the moments that matter.

Government digital services are clearly effective – the vast majority of Australians who engage with online services are satisfied. However, more could be done to increase adoption and reach sections of the public who are not taking advantage of the available services.

Trust in Data Protection is Waning

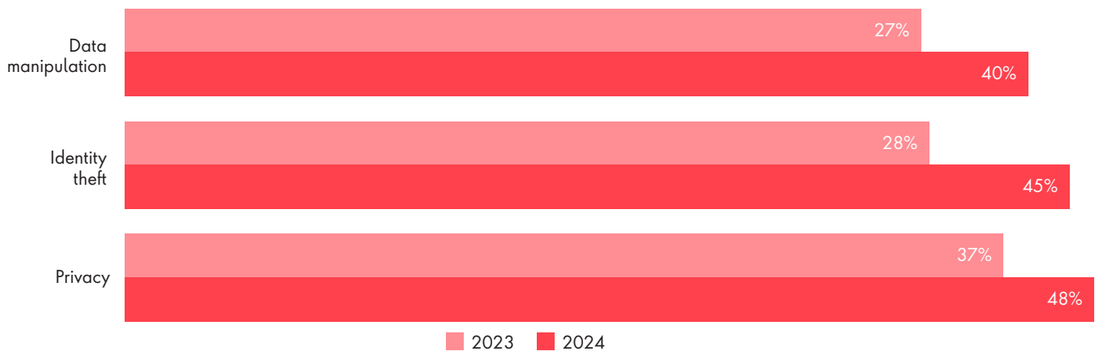
When we compiled our first Digital Citizen Report in early 2022, trust in government was riding high: 92% of respondents trusted digital services. This was despite the recency of the Robodebt controversy, which was called out by many of the doubters in that original survey. Since 2022 though, there has been a dramatic decline in public trust: 56% of Australians are now concerned or have doubts about how the government keeps their data safe.



This decline is especially sharp among younger citizens. 59% of under-45s have lost trust in the government's ability to protect personal data in recent years (the average across all groups was 52%). When asked if their attitude has changed, only 33% of Australians say their confidence in the government hasn't wavered.

High-profile data breaches at Optus, Medibank and other private-sector organisations haven't helped. These were common in write-in responses, with citizens flagging those data leaks as causes for their loss of trust in government services. 59% of Australians have changed their behaviour owing to recent data breaches and security incidents (especially those related to government services).

Concerns cited by respondents in 2023 vs 2024



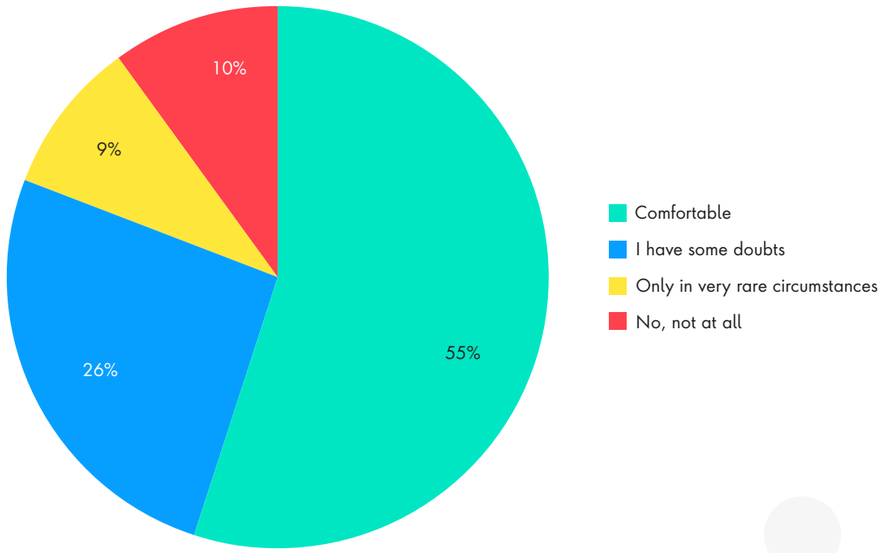
While security is a major focus at both state and federal level, it is just one part of the picture. Concerns about data collection and usage are also top of mind. 48% of Australians are concerned about data privacy this year, compared to 37% in 2023. Citizens want to know that their information is being used to provide better services, not in ways that contravene their privacy. Nearly half of survey respondents (45%) had at least some concerns about the way their data is shared between government departments.

When citizens worry about their data privacy and security, it dampens their enthusiasm for digital services, including from the government, and can slow down adoption rates. Security, privacy and data governance are foundational to the government's digital agenda – and clear, reassuring communication about safety measures is just as critical.

> "I'm hoping it's 100% safe, but there is always the possibility of a security leak."

> "Due to recent events, I'm with Optus and Medibank, my trust of secure networks has declined dramatically."

Are you comfortable with your data being shared across government departments?



Extending Digital Identity

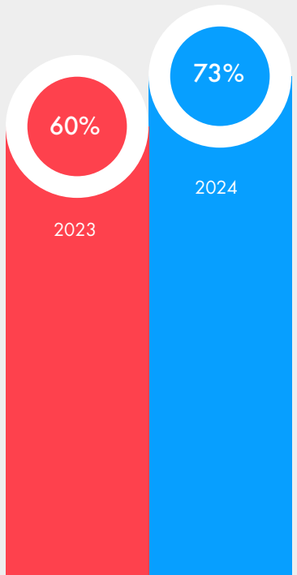
Our survey has taken myGovID as a focus for the last three years, exploring whether the government's strategy is working, and how it's being received by citizens. With the Digital ID Bill 2024 currently progressing into law, and the Federal Government's recently announced $288m investment in Digital ID, myGovID is going to become an even more critical success factor for Australian public services.



This is an important step in the right direction. As authentication processes become smoother in the private sector – with biometric single-sign on, for example – it's what citizens will increasingly become used to. They expect to get what they need in the fewest clicks possible, on any device, with the back-end processes happening invisibly.

We're seeing a significant year-on-year increase in the number of people using myGovID. 73% of Australians now have a myGovID login, compared to 60% in our 2023 survey. 91% have a positive experience using the service, and 83% find it trustworthy.

Australians with a myGovID

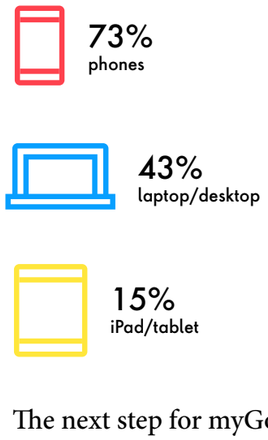


What's more, myGovID users have higher engagement and satisfaction rates. 94% believe that myGovID makes it easier to access government services. Users were more than twice as likely to rate their digital service experiences as 'excellent' (33%) compared to non-users (14%). They are almost three times as likely to believe that the government is getting significantly better at delivering digital services (20% versus 7%).

Compared to non-users, they are also much more likely to feel completely safe trusting the government with their data (21% versus 8%), and they have a higher rate of engagement with federal apps (88% versus 65%). The evidence suggests a strong correlation between myGovID usage and the kind of digital experiences that the Australian government is trying to drive.

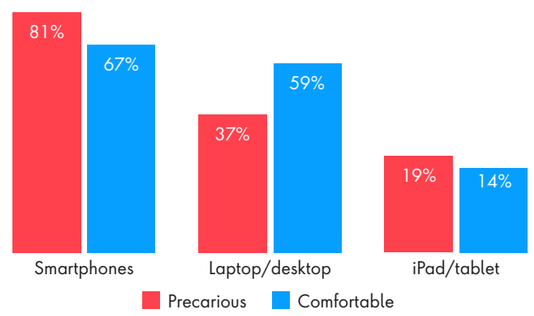
Smartphones were the most popular device for accessing government services – 73% of users accessed a service through their mobile. Laptops and desktops were the next most popular (43%), followed by tablets (15%). Smartphones were more popular among younger generations, whereas laptops were the dominant device for over-65s. Smartphones were also significantly favoured by those in precarious financial situations.

Device usage

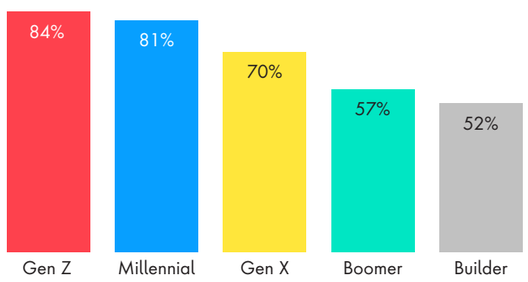


The next step for myGovID may be extending it into business transactions. This would help to reduce identity theft, limit the amount of data that citizens need to share online, and make authentication processes more seamless. Three quarters of Australians would support this kind of expansion (74%), with younger Australians showing the strongest enthusiasm. As these generations age into the Australian workforce and take up leadership positions, the momentum for myGovID in business is likely to grow.

myGovID access preferences by financial situation



Enthusiasm for businesses to start using myGovID, by age group



Publicis Sapient: Experts in Customer-Led Digital Transformation

Helping the public sector unlock the benefits of digital for citizens and society

Our Organisation

Pioneers of digital firsts.
Designers, creatives, strategists, architects and engineers – builders of technology for good.

Trusted to deliver.
Trusted by our clients to put their interests first – working with us feels different because it is.

People are our obsession.
Radically human-centred, so the products and services we build are transformative for the people and communities you serve.

Public sector experts.
Our team includes public sector leaders with decades of experience and a passion for impact.



Our Scale

20,000
passionate people

50+
offices globally connected

30+
years of digital pioneering and customer innovation

2,000+
large-scale innovation projects delivered for major multi-national and government organisations

Capabilities

S — STRATEGY
Developing and testing your hypothesis on priority value pools

P — PRODUCT
Helping organisations transform at the intersection of value, viability and execution

E — EXPERIENCE
Enabling ongoing value for your customers

E — ENGINEERING
Delivering on your promise, at pace, and at scale

D — DATA & AI
Validating your hypotheses and uncovering insights for constant iteration

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