



# WHAT'S NEXT FOR UK PUBLIC SECTOR DIGITAL SERVICES?

EXPLORING  
THE PUBLIC'S  
APPETITE AND  
ATTITUDES TOWARDS  
DIGITAL SERVICES

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THE UK PUBLIC SECTOR'S COMMITMENT TO DIGITAL SERVICE TRANSFORMATION HAS ACCELERATED SINCE THE ONSET OF THE COVID-19 PANDEMIC. OPTIMISING PUBLIC ENGAGEMENT HAS ALWAYS BEEN A PRIORITY FOR GOVERNMENT DEPARTMENTS, LOCAL AUTHORITIES, THE NHS AND OTHER PUBLIC BODIES, AS THIS ACTIVITY SUPPORTS THE HEALTH, SAFETY AND WELLBEING OF COMMUNITIES.

WHILE SERVICES HAVE BEEN EVOLVING FOR YEARS, THERE'S INCREASED EXPECTATION FOR ONLINE SERVICES TO BE MORE ACCESSIBLE, RESPONSIVE AND TRANSPARENT. MEANWHILE, THE PANDEMIC HAS ELEVATED THE ROLE OF PUBLIC SECTOR SERVICES IN EVERYDAY LIFE. THIS MEANS IT'S TIME TO REAPPRAISE PUBLIC APPETITE FOR SEAMLESS AND SELF-SERVICE PLATFORMS THAT ARE EVEN MORE PERSONALISED AND SECURE.

In fact, of the 1,500 UK residents surveyed by Infosys this year, 8 out of 10 have accessed public sector online services since the onset of the pandemic. As people come to rely on online service delivery, public sector organisations have an opportunity to optimise their platforms and make them more inclusive to people with various abilities, backgrounds, languages, and cultures.

The ongoing evolution of digital services is seeing platforms redesigned based on public feedback and becoming increasingly reliant and responsive.

As public sector organisations continue to integrate and build upon data sharing capabilities, it's important they have the trust of users through enhanced privacy and security measures. This is particularly crucial for sensitive data such as digitised public health records, digital identity systems and single sign-on technology.

In this report, Infosys sets out to understand how interaction with public sector services in the UK has shifted and how government agencies can identify the 'Next' in online services – so they can deploy optimised platforms that meet user needs and demands.

## Digital adoption is here to stay

This report was undertaken to identify potential barriers people face when using public sector digital services, as well as demands and expectations they might have in future. It aims to uncover what more can be done to support user appetite in the public sector. We've also explored the rates at which people have adopted various digitised government platforms in recent years.

The results clearly indicate a strong desire for improved and personalised services.

Overall, it shows that people from all backgrounds and abilities are relying on digital services – whether by necessity or choice – and most users intend to stick with them. With changing public needs and an evolving digital landscape, there is an opportunity for the public sector to adopt new tools and create future-proofed platforms that better support communities. What's clear is that people want a say when it comes to the design of public sector digital services in the future.



## National Data Strategy

The UK government is committed to driving the improved delivery of policy and public services. The National Data Strategy<sup>1</sup> identifies five ways data can positively transform the UK:

- Boosting productivity and trade
- Supporting new businesses and jobs
- Increasing the speed, efficiency and scope of scientific research
- Driving better delivery of policy and public services
- Creating a fairer society for all

### Uncovering key trends:

- Use of public sector digital services has significantly increased as public sentiment grows
- Existing platforms have come a long way, with many elements deemed on-par with private sector services
- Embedding human empathy into digital services divides opinion
- There's huge opportunity for digital accessibility improvements – but barriers such as technology access and adequate service delivery remain
- Digital inclusion remains key to usage growth
- Continuously enhancing digital security and embedding privacy into every digital service remains key to building trust and bringing more of the population along on the digital journey
- People have an appetite for single sign-on to simplify how they navigate digital government services

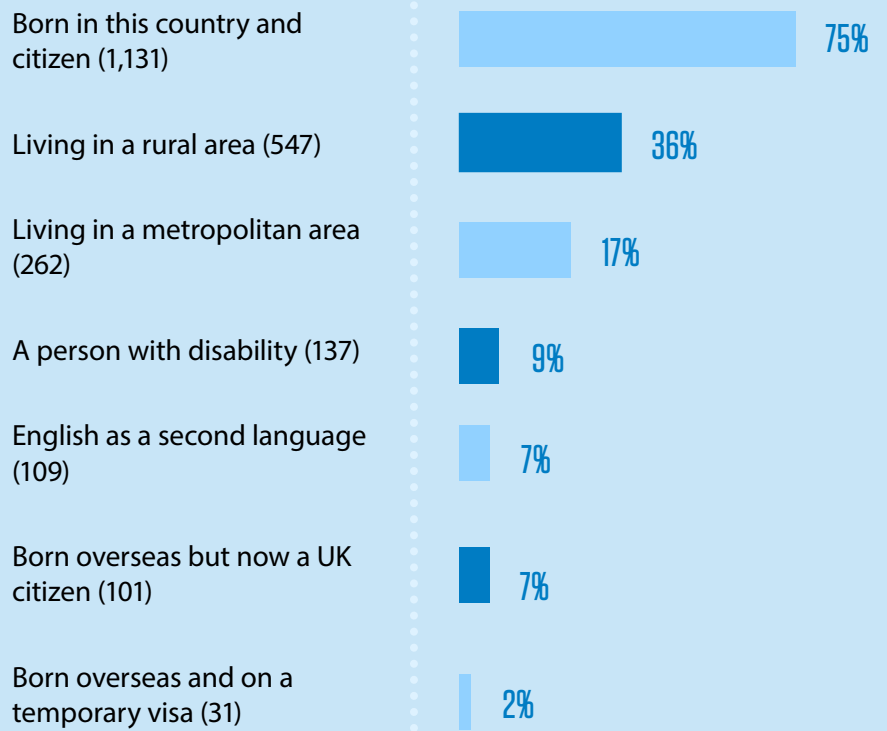


## During early 2021, we asked:



1,500 UK residents

## Respondents identified as:





# ADVANCES IN DIGITAL SERVICES HAVE BEEN IMPRESSIVE

The UK's evolution of public sector digital services has been rapid and effective and has accelerated since the onset of the pandemic. From major cities to the smallest of towns, public sector platforms can deliver services anywhere and at any time, with improvements still on the horizon.

Services are sufficiently sophisticated to address physical and cyber threats in real-time with proactive security processes. With the proposed introduction of a Digital Identity Trust Framework<sup>2</sup>, government has shown further commitment to take historic concerns on board and continually enhance privacy, security and service delivery.

This is in stark contrast to times when constituents could only be served from physical support centres with limited opening hours. A response could often take days, sometimes months, but rapid prototyping means residents can have their answers on the same day. It's therefore no surprise that many people have chosen to adopt digital public services.

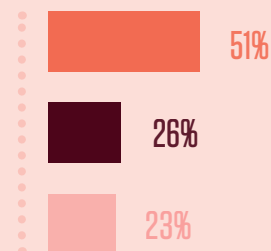
## More people have been using digital services in the past 12 months with COVID-19 restrictions in place.



8 out of 10 people have accessed digital services when interacting with public sector organisations.

## 26% only use digital services

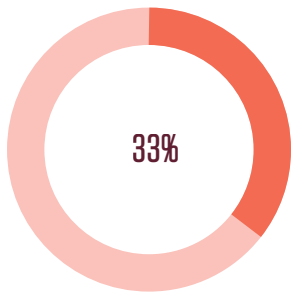
- 51% use smartphones
- 26% prefer PCs
- 23% use a combination of both



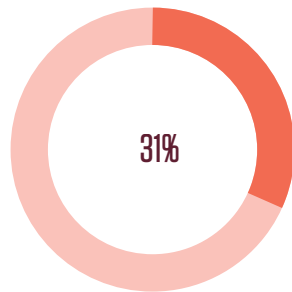


## Keeping up with tech trends

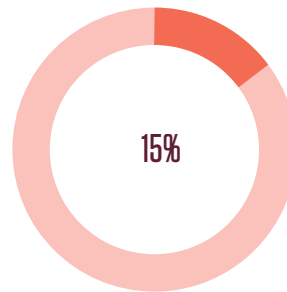
With improvements in people-centric service delivery, many have noticed they have saved time and gained confidence using public sector digital services. Public sector organisations have built trust through transparent and respectful services that consider the needs of people and enable superior engagement experiences.



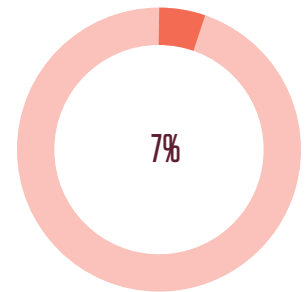
HAVE SAVED TIME USING  
ONLINE SERVICES



HAVE MORE CONFIDENCE TO  
USE THE SERVICES



HAVE MORE TRUST IN  
THE SERVICES



HAVE FOUND THE  
SERVICES HARDER OR  
MORE COMPLEX TO USE

## UK Digital Skills

The UK government has made several commitments to boost the digital skills of adults, ensuring they have equal opportunities that can help them find future employment. The Digital Skills Partnership<sup>3</sup> is one initiative from the UK Digital Strategy that brings together public, private and charity sector organisations to help increase the digital skills of individuals and businesses in England. The Connecting Scotland<sup>4</sup> program develops basic internet skills, with a specific focus during the pandemic to prevent isolation of people with low digital skills. In May 2021, the UK government also unveiled a new policy and funding programme<sup>5</sup> to provide all adults with equal opportunities to learn new skills such as coding, helping them to find jobs during and after the pandemic.

## Key findings

- 54% of respondents like accessing digital services when convenient for them
- 43% find digital services easy to use
- 22% like how they receive real-time responses
- 22% struggle to remember multiple passwords and log-in information for different services

### Why online?

- EASE OF USE
- CONVENIENCE
- AUTONOMY
- SPEED
- REDUCED WAIT TIMES
- ACCESSIBILITY



“

Online services are more convenient, easy-to-do and it saves the hassle of trying to contact somebody.

”

“

Gov.uk and government gateway services are actually really good. I have found that I have easily been able to complete what I wanted to do on there. The website is logical and clear.

”

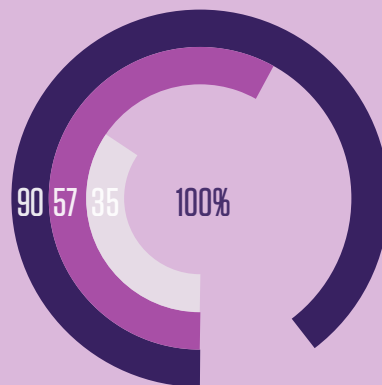


# PUBLIC VS PRIVATE

The vast majority of respondents said that public sector digital services are now on par with or better than the online experience offered by private companies regarding; ease of use (76%) and access to customer support (68%), as well as accessibility for people who speak languages other than English (89%) or those with varying abilities (84%).

Technology interfaces have been identified as a powerful lever for public sector interaction with citizens, so it's important they're reshaped to become 'one-stop' service destinations. By streamlining various touchpoints and enabling cross-communication between digital and physical channels, governments can take the experience journey to the next level.

MORE THAN 90% THINK ONLINE GOVERNMENT SERVICES HAVE THE SAME (57%) OR BETTER (35%) SECURITY MEASURES THAN PRIVATE COMPANIES OFFER.

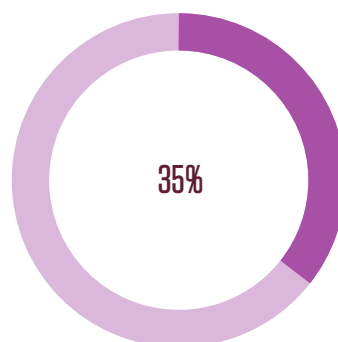


A quarter of UK residents think public sector digital services are the same or better at keeping them up to date with notifications (25%)

## The award for most improved goes to...

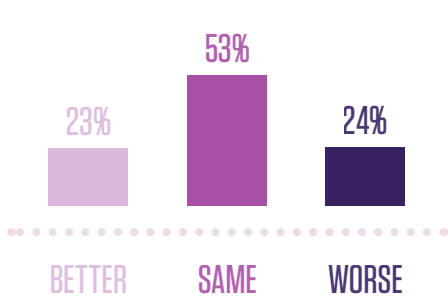
**Renewing a license** and **passport services** are services that people have noticed the most improvements in over recent years. **Job search platforms** and **checking/claiming welfare entitlements** followed.

35% OF THOSE BORN OVERSEAS WHO ARE EITHER NOW A CITIZEN OR CURRENTLY ON A TEMPORARY VISA SAID THEY'D NOTICED AN IMPROVEMENT IN DIGITAL VISA APPLICATION PROCESSES.

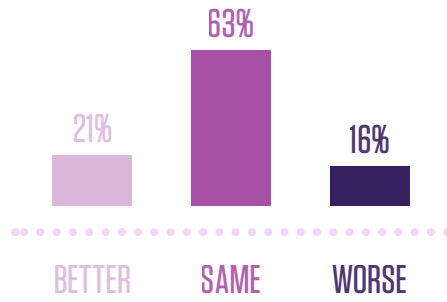


# How public sector digital services compare to the private sector:

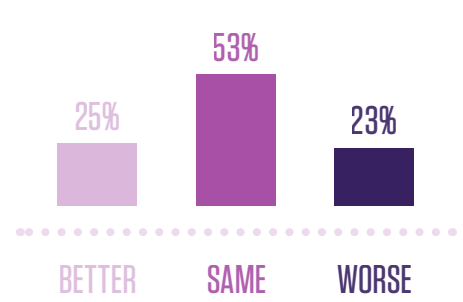
Ease of use:



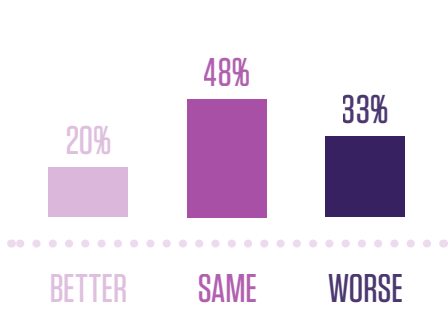
Addressing the needs of people with disability\*:



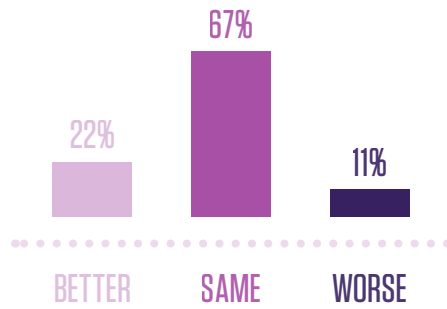
Up-to date notifications:



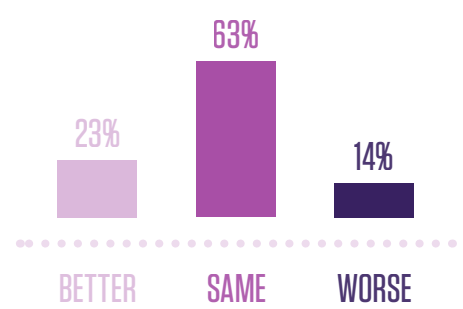
Access to human support when required:



Number of languages available:



Communication of storage and use of personal information:



\*Answered by people with disability



# LOCAL COUNCILS PLAY A PIVOTAL ROLE

Local councils play a broad and important role in serving their community every day through social care, transport, housing, education and waste collection. These interactions are often a person's first point of contact, which can shape their opinion about public sector digital services overall.

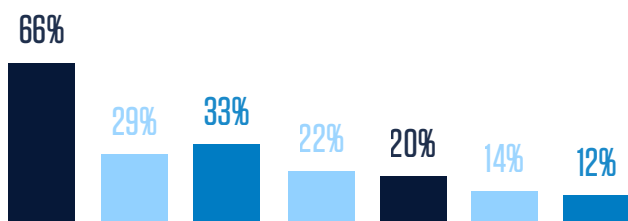
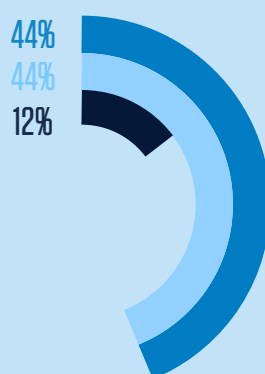
Councils have social inclusion high on their priority list and seek to make digital services more accessible for residents from all walks of life. They can help build digital literacy and confidence among communities and local businesses by improving connectivity and implementing education initiatives.

## Currently, interactions with local government are mixed.

ALMOST HALF (44%) SAID THEY HAD A GOOD OR VERY GOOD EXPERIENCE WHEN CONTACTING THEIR LOCAL COUNCIL FOR HELP AND INFORMATION REGARDING THE COVID-19 PANDEMIC.

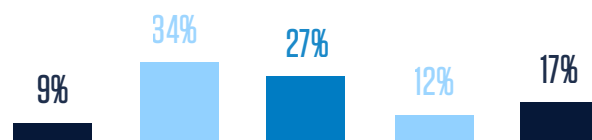
THE SAME AMOUNT (44%) WERE UNSURE ABOUT THEIR EXPERIENCE.

WHILE ANOTHER 12% SAID IT WAS BAD OR VERY BAD.



Two thirds of residents said they received information about local council services and benefits through their website, while a third said word of mouth.

- Council website (66%)
- Council social media (29%)
- Word of mouth (33%)
- Local social media groups (22%)
- Local newspaper (20%)
- Council newsletter (14%)
- Council leaflets/adverts (12%)



Almost half of UK residents surveyed (43%) feel well informed or very well informed about the services and benefits their local council is providing. Just under a fifth of people don't think they are informed enough.

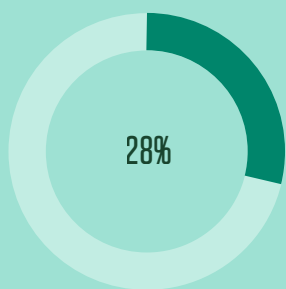
- Very well informed (9%)
- Well informed (34%)
- Unsure (28%)
- Quite informed (12%)
- Not informed enough (17%)

# MANY STILL WANT IN-PERSON SERVICES

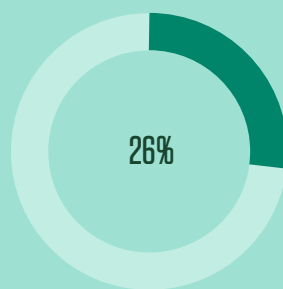
While use of digital services has increased since the pandemic began, a preference for digital-only services hasn't entirely followed suit. Human interaction at public sector support centres or via the phone remains preferred by some people at all ages. Surprisingly, those aged over 54 were more likely to engage with digital platforms exclusively than any other age category (36%). A longing for human connection could partly explain why some residents said they would initially return to using in-person services after COVID-19 restrictions ended. This finding also highlights the importance of integrating a personal or human element into digital technology.

## HUMANS ARE STILL NEEDED

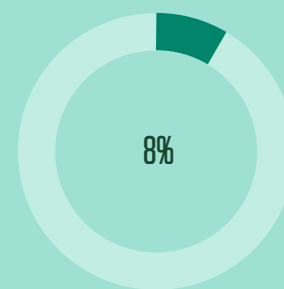
We explored why respondents were missing human interaction and whether this will continue going forward. We found:



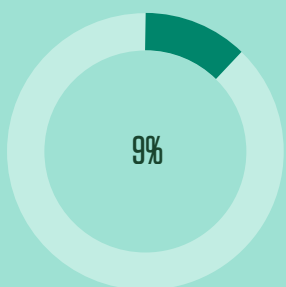
mostly used digital services but prefer human interaction, so will likely return to using phone/in-person services now COVID-19 restrictions have ended



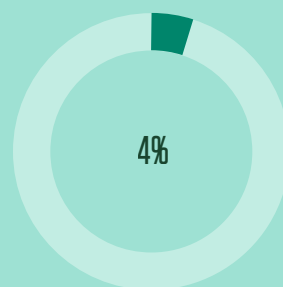
only used digital services amid the pandemic, which was the same figure as pre-COVID 19



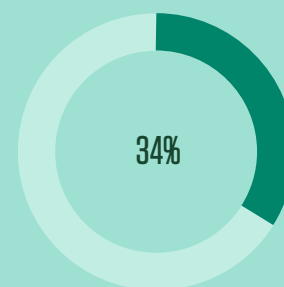
prefer human interaction so used mostly phone services



feel more comfortable with in-person interaction instead of online



chose to exclusively use phone/in-person services



mostly used digital services, but had to use some in-person or phone services that weren't all available digitally



# HUMAN EXPERIENCE: WHAT'S THE BALANCE?

Despite digital advances, the desire for a personalised service delivered by a human still pushes people towards in-person and phone services. Many respondents reported that showing “empathy” was important, which should be considered when forging a digitally sustainable future.

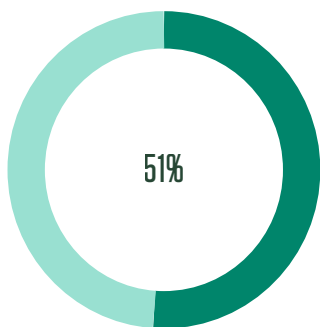
Those who prefer in-person or phone interactions cited they appreciated a more personal feel, place a greater importance on avoiding glitches and felt the need for human interaction. However, many were comfortable using online platforms, often to save time. So, what’s the balance? By looking at the problems from a human perspective, human-centred design solutions can be incorporated into digital service platforms. Public sector agencies across the globe are scaling efforts to develop and deliver government services through insightful digital programs and platforms.

*“Our research shows that Digital already plays a central role in public sector engagement with UK residents. Now it is time to make the experience smarter. By hyper-personalising the human experience (HX), it can become more inclusive and relevant to each resident. To enable this, true single-sign-on and opt-in data privacy is needed, which our research confirms residents are open to and expect.”*

- Ralf Gehrig, Chief Experience Officer, WONGDOODY, Infosys’ Design Studio

## ATTITUDE COUNTS

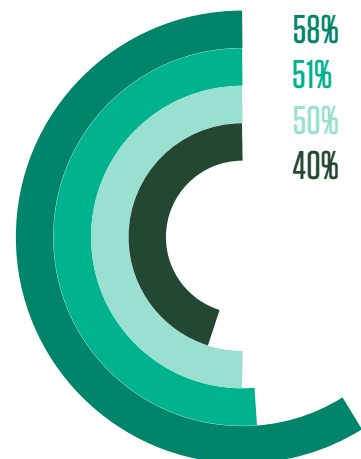
Half of our respondents think it is important for digital experiences to feel “human” and show “empathy”.



want their digital experiences to feel “human” and show “empathy”



Only 1 in 10 (12%) didn't want their digital services to feel human



Age groups differ in how much they desired empathy, with the youngest cohort slightly more convinced:

- 18-34: 58%;
- 35-44: 51%;
- 45-54: 50%;
- 54+: 40%

## AI-powered chatbots

Virtual assistants have grown in sophistication and AI-powered chatbots are one of the best products on the market. Conversational AI is primed to become a universal interface for query response, which can help governments create more accessible platforms. With 71% of respondents appreciating a more interactive approach, an optimised chatbot that shows “empathy” could be of great benefit for certain services. A simple query system could prove a useful tool to those less tech-savvy who are trying to engage with an online service for the first time. While bots don’t have a personality of their own, they’re able to exhibit knowledge while conversing in the most “human” way possible. This can meet demands for online services that afford a level of humanity.





“

Being face-to-face enables you to ask any questions you may have. It just makes the situation easier and also - who doesn't love a bit of human interaction these days?

”

“

I do like both forms - I do prefer human interaction over the phone, but have been using digital banking for a long time and it is just easier for government needs.

”

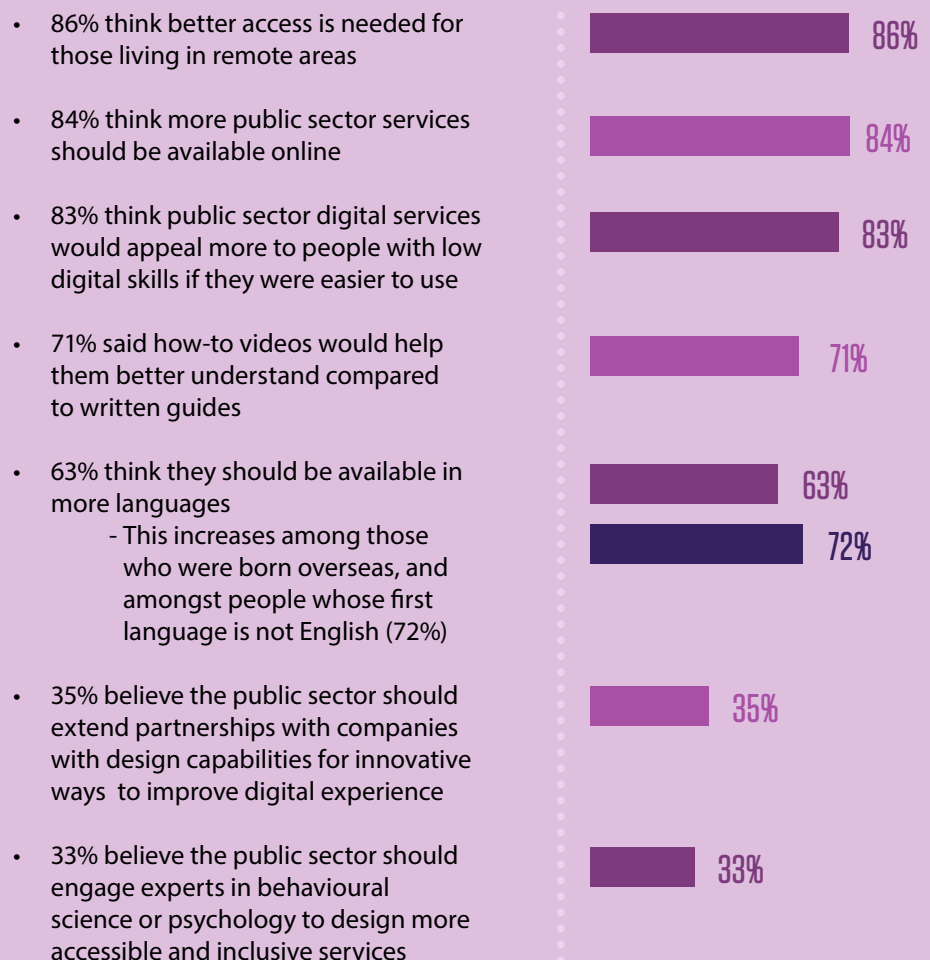


# BUILDING INCLUSIVITY: A KEY OPPORTUNITY

When transforming public sector digital services, diverse needs and abilities are a crucial consideration.

Digital inclusion is a key social justice challenge facing policy makers worldwide and digital disadvantage is tied to other forms of social and economic barriers. This means communities who need the most support often face the greatest risk of being left behind on a government's digital journey. By integrating inclusivity and accessibility into public sector platform design, barriers for people of various abilities and backgrounds can be reduced.

## 85% of people think public sector digital services should be more inclusive to people with disability



“

I have MS and it affects my speech,  
and I have anxiety so I do not use  
the phone.

”

“

I'd be grateful for any work with  
charities like the Epilepsy Society  
or mental health charities, so they  
can advise them how to make it  
accessible for people like me.

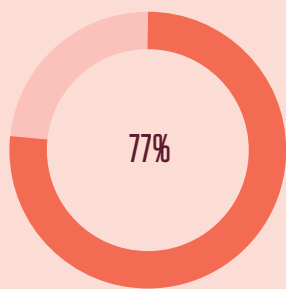
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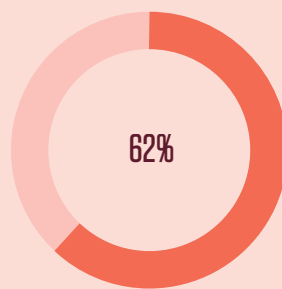
# BUILDING CONFIDENCE THROUGH A SECURITY AND PRIVACY-FIRST APPROACH

As digital footprints increase, a transparent privacy and security-first approach will build trust in data sharing – and ultimately digital confidence. More than three-quarters (77%) of UK residents are comfortable with sharing personal information with digital government services, but 3 in 5 (62%) said this was only if they knew how their information was stored and used.

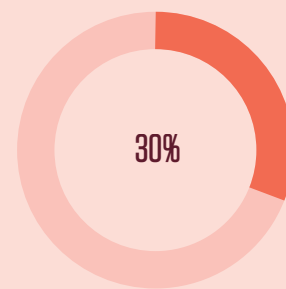
By enhancing privacy and security safeguards in data-reliant platforms, trust can be secured that creates confidence in, and increases usage of, digital services.



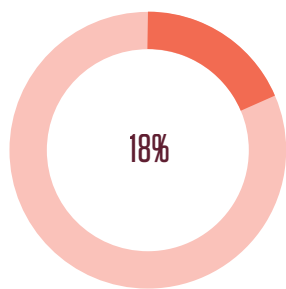
are comfortable with sharing personal information with digital government services



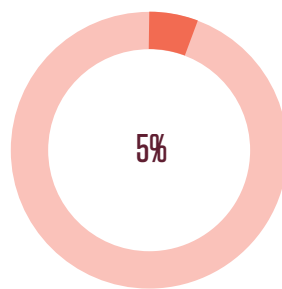
are comfortable with sharing personal information only when they know how their information is being stored and used



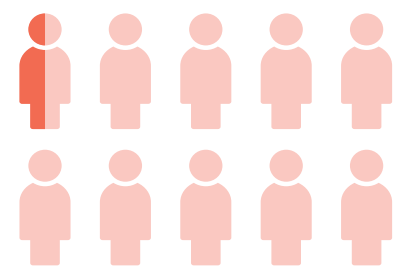
are calling for higher online security measure to protect personal information



almost one-fifth have concerns about how they store, protect or use personal information



said they would rather not share personal information due to concerns online security systems are vulnerable



Less than 1 in 10 (8%) said they were concerned about data privacy issues and do not trust online interactions







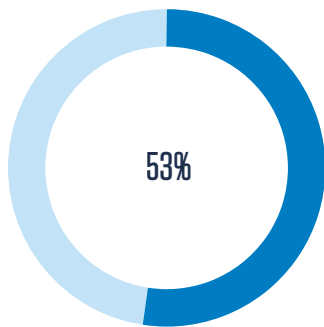
# WHAT COMES NEXT?

While a growing number of residents are comfortable with public sector digital services, more work can be done to bring those less digitally confident on the journey. Setting a path for the next cohort of users requires building trust and confidence in online systems.

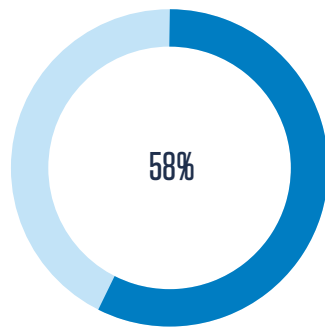
- **Streamlined services:** Residents have expressed enthusiasm for a single sign-on across various government services, potentially in the form of a digital ID. By avoiding issues related to multiple log-ins across platforms, governments can create services with multiple capabilities thus reducing information siloes and associated costs.
- **Painting a whole picture:** When data is securely shared across public sector platforms, its cross-functional use can optimise the user experience. With more available data, pre-filled forms can be readily used, encouraging further engagement due to the seamless experience on offer. Having access to this data can also better shape a single view of a person and their needs.
- **Self-sovereignty:** Delivering a secure and trusted digital identity that allows individuals to govern what data they share, how it is used and stored between public sector organisations – and potentially associated private sector services – can be prioritised. By giving UK residents the opportunity to construct their own digital identity data without intervention from external authorities, more trust and confidence will likely be built.
- **Optimising spend:** Digital services and the associated integration can minimise operating costs and enhance efficiency, supporting an existing focus on economic recovery initiatives.
- **Designing environmentally sustainable services:** Reaching net zero carbon emissions by 2050 is a priority for the UK government<sup>6</sup> and a core pillar of its IT strategy. Designing and delivering digital services in a sustainable ecosystem that reduces a government agency's digital carbon footprint will support these efforts. There is also significant pressure for enterprises and governments to look beyond traditional climate change measures to achieve sustainability. At Infosys, we have found that a digital carbon reduction program can be assessed and kickstarted by examining the problem through four lenses: data, technology, finance and people.

# PEOPLE-CENTRIC SOLUTIONS

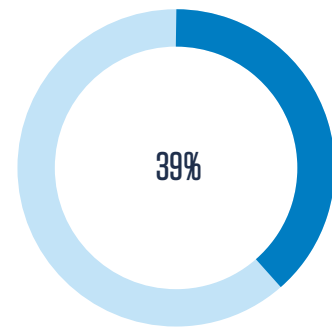
We asked residents to suggest their own improvements to digital government services. The top three requests were for **one central log-in**, **pre-fill forms** using existing personal information and **higher online security measures**.



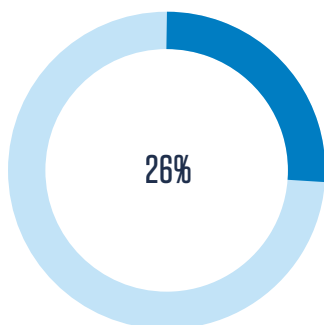
said they'd like **one central log-in** to access all public sector digital services because there are currently too many different platforms



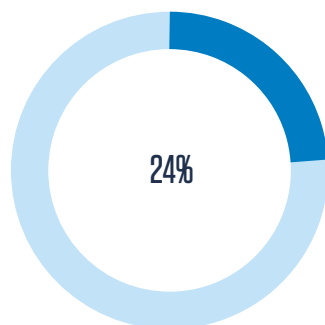
of those who **identify as a person with disability** were also largely in favour



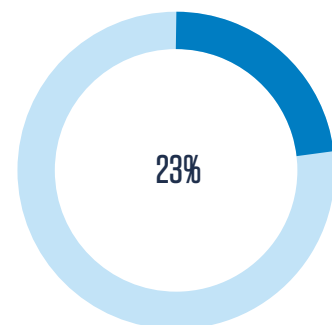
said they'd like their stored information to be used to **pre-fill forms**, so they don't need to find paperwork or repeat themselves



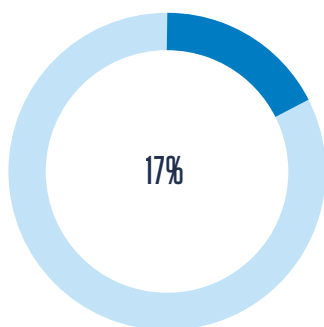
would like more **real-time notifications** or updates via SMS/ email when something impacts them



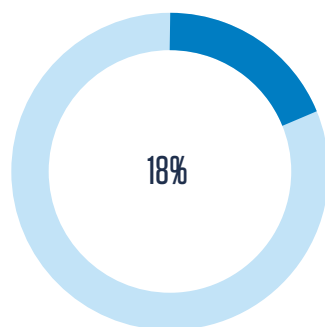
want to be able to control what **personal information** is shared across government agencies



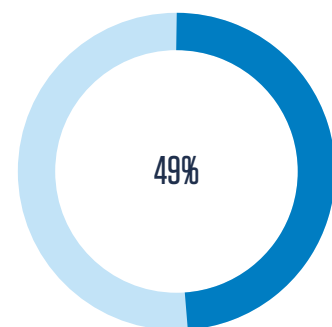
want **medical history** available to healthcare professionals to improve care



want more personalised information **based on their own circumstances and existing information**



want more personalised information about **how policy and legislation changes affect them**



think digital government service websites could be improved by **enhancing their look and feel** to emulate the private sector







# INFOSYS INSIGHTS

DIGITAL SERVICES HAVE INTEGRATED INTO ALMOST ALL ASPECTS OF OUR EVERYDAY LIVES – FROM SHOPPING AT THE LOCAL SUPERMARKET TO BANKING ON AN APP. PUBLIC SECTOR ORGANISATIONS WILL CONTINUE TO ACCELERATE DIGITAL SERVICES BY RESPONDING TO THESE EVOLVING NEEDS.

The UK government is striving towards improving people's experience of digital services by making them simpler and user-friendly across multiple platforms, particularly in relation to health and welfare services. Investment will enable better access to unbiased user data, agile policy changes and seamless interaction. Here's what Infosys sees as the 'Next' steps for digital government services, which will enable the UK to lead the way:

## 1. Bridge the digital divide

Across the report, those who identify as a person with disability voted overwhelmingly in favour of a more inclusive approach to digital government services. It's clear there needs to be better recognition of the barriers this community faces online. By considering accessibility requirements right from the design phase and gathering constant feedback from people on improvements needed, overall digital service experiences can be optimised. By building more digitally inclusive services for residents, the social and economic challenges for underrepresented and digitally disadvantaged groups can be better addressed. Inclusive digital services that are straightforward and easy to use, with accessible interfaces, can help bridge the gap between governments and people from various cultures, languages and abilities, with a goal that nobody gets left behind in the digital evolution journey.

## 2. Transform foundations

Digital acceleration is often hindered by a dependency on pre-existing physical systems. But to discontinue the use of this infrastructure's critical data and policy detail isn't always possible or necessary. With the right approach, many systems can be reimagined and transformed into people-centric platforms, rather than replaced.

This will help streamline the entire customer journey end-to-end, from initial service experiences to record storing into the future. Infosys can expertly evaluate and uncover whether existing systems can be modernised into agile and scalable cloud platforms with the potential for real-time insights and ongoing policy updates. A key consideration for government is whether systems are interoperable, meaning products and technology can be swapped in and out as processes change over time<sup>7</sup>. By transforming foundations to improve agility, a superior service experience can be delivered.

## 3. Policy agility is key

In a sector where policy evolution directly impacts people's livelihoods, implementing legislated changes for technology can understandably become complex and time-consuming. The additional challenge here, but potential benefit, is that policy implementation typically rests with multiple government agencies. 'Policy agility' as an approach requires tight collaboration between departments, agencies and partners. With an agile and modular drive towards policy change, implementation can be accelerated and ongoing assessments of the change's impact can be made.



#### 4. Forge trust in managing unbiased data

Non-sensitive individual data is a strategic asset that governments across the world are using to make evidence-based decisions that can improve citizen service delivery. Transforming government use of data to drive efficiency and improve public services is a fundamental part of the UK Government's National Data Strategy<sup>1</sup>. Key to making the best use of resident data is by being truly transparent about how it is managed, addressing data privacy and security concerns, and building platforms that are easy to navigate and access. It's critical that people can decide what data they share, how it is used and who can access it - as this forges trust and engages people.

#### 5. Humanise digital services

Putting people at the core of every digital platform is crucial, and our research clearly identifies that people want to be involved from the design stage through to live rollout. Understanding the needs and challenges faced by those using digital government services is a crucial element in designing people-centric experiences. To fully understand the diverse needs of the population, it's important to conduct deep research and prioritise public feedback. Integrating Human Experience (HX) design into evolving services by combining Customer Experience (CX), User Experience (UX) and Employee Experience (EX) techniques – with a layer of creative thinking – can achieve better overall HX. It's something WONGDOODY, an Infosys company, helps organisations do every day.

#### 6. Invest in the innovation ecosystem

An evolution of a system as widespread as digital government can't happen in a silo. By continuing to foster collaboration between the public sector, private entities, not-for-profit organisations and the academic world, the government can deliver better services, ideas and approaches for their constituents. Infosys Springboard is one of the ways Infosys has invested in the ecosystem, providing equal learning opportunities for underrepresented communities in the UK. The programme, which is powered by Infosys Wingspan, aims to increase digital literacy and open the door to new career opportunities and better outcomes for individuals, communities and businesses. It also supports digitisation in the private sector by connecting entrepreneurs to mentors in the Infosys Innovation network. With a culture of innovation and lifelong learning, Infosys can support public sector organisations through discovery, design, build, and the continual optimisation of digital services.





# ABOUT INFOSYS

Infosys is a global leader in next-generation digital services and consulting. We enable clients in more than 50 countries to navigate their digital transformation. With over four decades of experience in managing the systems and workings of global enterprises, we expertly steer our clients through their digital journey. We do it by enabling the enterprise with an AI-powered core that helps prioritise the execution of change. We also empower the business with agile digital at scale to deliver unprecedented levels of performance and customer delight. Our always-on learning agenda drives their continuous improvement through building and transferring digital skills, expertise and ideas from our innovation ecosystem. Visit our **UK Public Sector** page to learn more.

## Survey Methodology

Infosys commissioned independent market research conducted by Pollfish in early 2021, surveying 1500 UK residents aged 18 and over.

**Visit [infosys.com](https://www.infosys.com) to see how Infosys (NYSE: INFY) can help your enterprise navigate your next.**

## References:

1. UK Government Policy Paper: National Data Strategy
2. UK Government Policy Paper: The UK digital identity and attributes trust framework
3. UK Government Guidance and Support: Digital Skills Partnership
4. Connecting Scotland
5. UK Government: "Hundreds of free qualifications on offer to boost skills and jobs"
6. UK becomes first major economy to pass net zero emissions law
7. UK Government: Speech – Digital Government

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