



Delivering for citizens

Digital Nation Survey 2022

PwC in the Caribbean



Our survey of **more than 2000 citizens** from around the Caribbean reveals that most are now advocates for government digital services, believing they have the **potential to improve public services and make their lives easier**.

But the digital dividend is being held back by **limited awareness** of what's on offer, difficulties navigating multiple sites and a **lack of trust** in how citizens' data will be used and protected.

How do citizens see the digital future? How can governments and citizens **work together to bridge the digital divide** and realise the benefits? How can governments **dial up digital inclusion**, usability and satisfaction?

At a glance

Gauging expectations

Embracing digital

Caribbean citizens are keen to embrace government digital services. More than nine in ten survey respondents (91%) believe that technology can improve the quality of their lives. Two in three (66%) are advocates for the use of government digital services.

Keen for expansion

When asked about the potential for expanding digital service offerings, more than eight in ten respondents acknowledged the benefits of collaborating with local universities (84%) and private sector (83%), for service offerings.

Embracing digital

66%

are advocates for the use of government digital services.

83%

acknowledged the benefits of collaborating with local universities



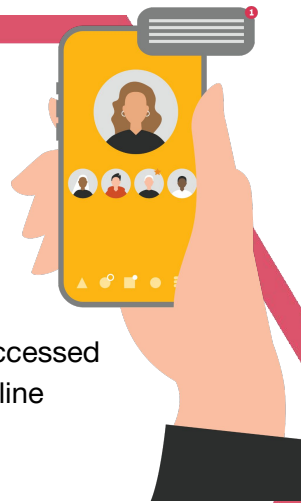
Disappointing uptake

46%

of respondents have accessed government services online

39%

believe that lack of public access to the internet would deter further usage of government digital services.



Gauging usage

Disappointing uptake

But uptake of government digital services is still low. Despite increased use during the COVID-19 pandemic, less than half of survey respondents (46%) have accessed government services online. This is well below the 74% who've purchased commercial goods and services through an online or mobile platform.

Barriers to engagement

Survey respondents see the biggest barriers to use of government digital services as limited awareness and unfriendly user interfaces.

The survey also highlighted a worrying lack of trust. Less than a quarter of survey respondents believe that government institutions use the personal data shared online responsibly and ethically.

While concerns over lack of connectivity and suitable devices are less prevalent, they still affect a significant proportion of the population. Nearly two in five survey respondents (39%) believe that lack of public access to the internet would deter further usage of government digital services.

At a glance

The way forward

So how can governments and citizens work together to boost take-up of digital services and realise the benefits?

One-stop access

More than eight in ten survey respondents would be more likely to use government digital services if multiple services could be accessed via an online portal (88%).

Improved communication

More than eight in ten would increase usage if there was more communication about how specific technologies can improve access to relevant services (88%).

Harnessing technology

More than eight in ten would increase usage if the government incorporates new technologies to improve services (87%).

Strengthening engagement and trust

Involving citizens up-front in designing government digital offerings would help to improve engagement and make sure the services and experience reflect their needs.

What also comes through from the survey is the importance of improving protection of personal data and being transparent over why and how it's collected and used.

One-stop access

88%

of respondents would be more likely to use government digital services if **multiple services could be accessed via an online portal**



Harnessing technology

87%

of respondents would increase usage if the government **incorporates new technologies to improve services**



Introduction: Citizens have their say

Are government digital services delivering for citizens? To find out, we asked more than 2000 people from around the Caribbean what they want from government digital services, how they rate what's on offer now and what governments could do to make the most of the potential benefits.

Welcome to the Digital Nation Citizens' Voice Survey 2022.

Digital technology and engagement are transforming how we work, communicate and access products and services. In last year's [Caribbean Digital Readiness Survey](#) we looked at how far businesses have come in meeting consumer expectations and what marks out the front-runners from those struggling to make headway.

From education, training and economic development to making citizens' lives easier in areas such as pensions, tax returns and vehicle registrations, the digital revolution is also reshaping how government services are delivered and what's possible from them. For governments, this is an opportunity to strengthen the quality and availability of their services, while boosting cost-efficiency and easing the strains on staff.

91% of survey respondents believe that technology can improve the quality of life.

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Catalyst for transformation

The COVID-19 pandemic has shown how governments can speed up digital transformation and introduce tech-savvy solutions in a crisis. The communication and coordination of testing and vaccination services are a clear case in point.



“Digital government is the future.”

Digital Nation Survey respondent



Pulse check

Having highlighted the potential, the past two years offer a great foundation for further advances in government digital services. As we explore in this report, the big question is what service offerings and developments would best meet citizens’ expectations, and hence where governments should be focusing attention and resources.

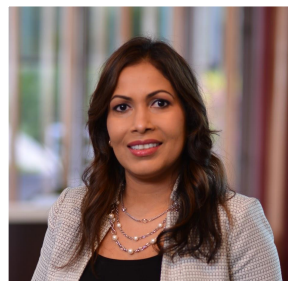
To find out, we asked more than 2000 people from around the Caribbean what they think about their government’s digital services across the **five key dimensions of; Attitudes, Awareness, Accessibility, Satisfaction and Trust**. And because building tomorrow’s government services begins by considering today’s needs, the questions were designed to help inform service delivery requirements and find out what would really make a difference to citizens’ lives. The survey forms part of our [Digital Nation](#) campaign, which aims to support and drive citizen-centric, effective, accountable and inclusive digital services, with greater transparency and trust, that will leave no one behind and ultimately improve the lives of all citizens across the Caribbean. What’s most striking and encouraging from the findings is how much demand and advocacy there is for these digital services. Citizens have seen the digital potential and want more. But barriers to uptake remain in areas ranging from lack of awareness to unfriendly user interfaces. Many citizens also have misgivings about the security of the data they share with the government and how responsibly and ethically it will be used.

Only **36%** of survey respondents are aware of their government’s digital service offerings.

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The way forward

As we outline in the final section of this report, there are some key technical and organisational steps governments could take to improve usability and satisfaction. These range from stronger cybersecurity to accessing all services through a single portal. But in many ways the biggest boost could come from dialling up digital inclusion by involving citizens earlier and more extensively in the design and development of digital services. The result would be a virtuous circle of usefulness, usability and trust.



Zia Paton

Digital Services Leader, PwC in the Caribbean

Attitudes

Caribbean citizens are strong advocates for the benefits of government digital services, underlining the potential for further development.

Technology can improve the quality of life is the clear message coming from our Citizens' Voice Survey – 91% agree, 57% strongly.

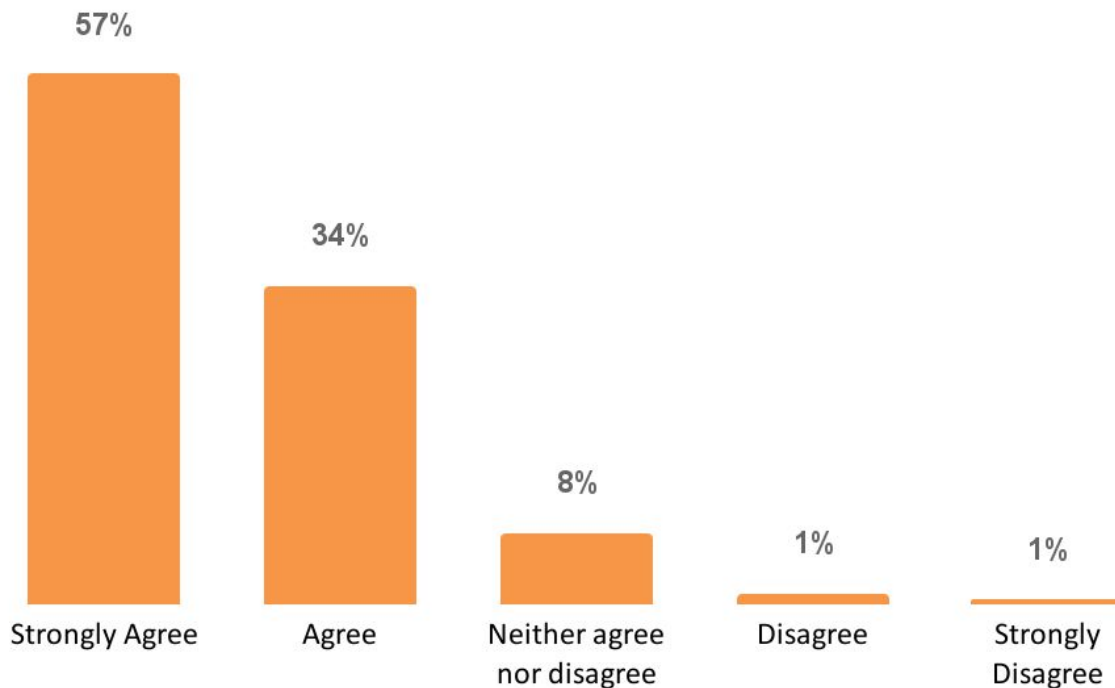
The acceleration in digital transformation in the wake of the COVID-19 pandemic has increased the traffic on mobile and online channels and opened many people's eyes to the possibilities.

As even once diehard technophobes now embrace the digital world, nearly three-quarters of the citizens in our survey (74%) now purchase goods and services via a digital platform.



Figure 1
Digital potential

To what extent do you agree that technology improves the quality of life?





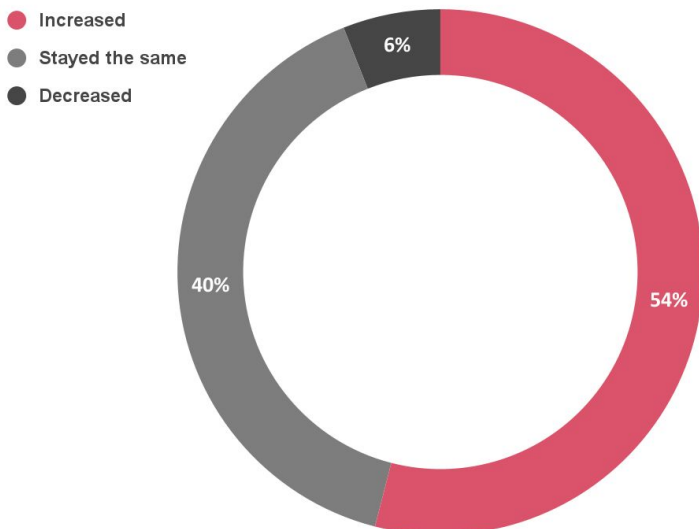
In relation to government digital services, two in three citizens are now advocates for their use. More than half have increased their use of government digital channels during the pandemic.

Two in three survey respondents are **advocates** for using government digital services.

Digital Nation Citizens' Survey 2022

Figure 2
Using more government digital services

Considering your experiences with government services during the ongoing COVID-19 pandemic, would you say that your use of digital channels (such as websites, apps and online chats) has increased, decreased or stayed the same.



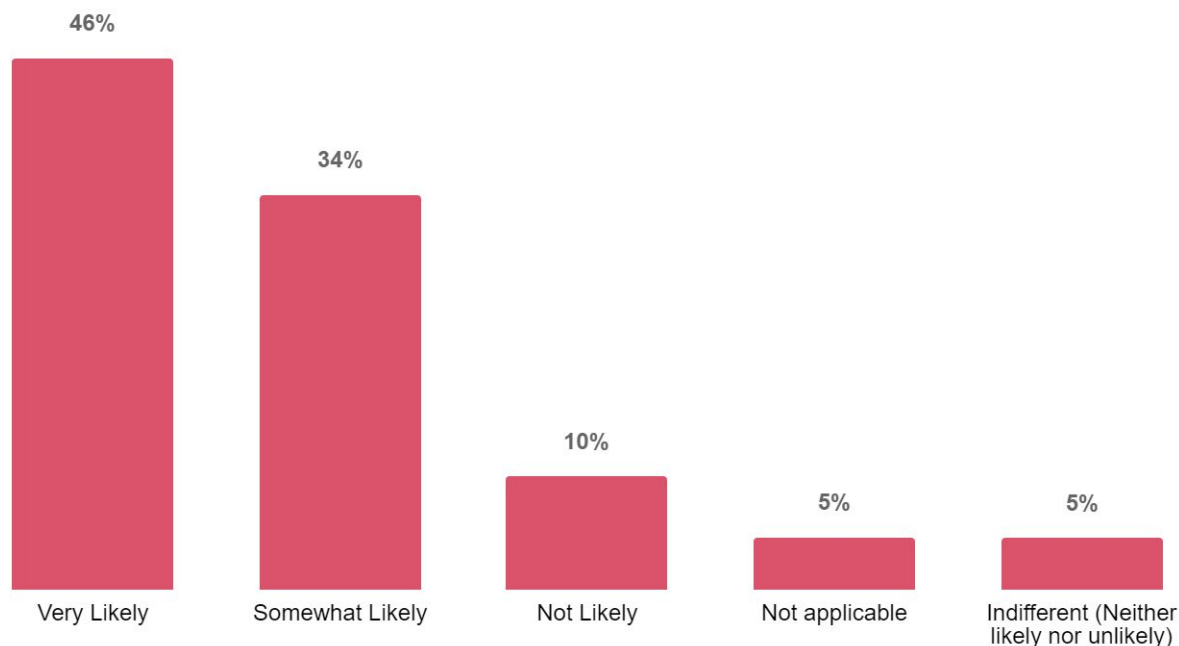


Training and information are among the areas they most look for online – around four in five respondents are likely to use government training schemes to improve digital skills or learn more about accessing government services. When asked about the potential for expanding digital service offerings, more than eight in ten respondents recognised the benefits of collaborating with local universities (84%).

More than eight in ten would also like to see greater collaboration with the private sector for certain government service offerings (83%). Potential areas of focus range from healthcare to assistance with planning applications and government grants. However, 61% of respondents believe that the privacy and security risks of sharing personal data with the private sector to improve public services outweigh the benefits.

Figure 3
Key source of training and information

How likely are you to use government training schemes to improve your digital skills or learn more about accessing government services?



Untapped potential



Despite increased use during the pandemic, less than half of survey respondents (46%) have accessed government services online. The fact that fewer citizens access government digital services than purchase commercial products and services shows that there's further potential for strengthening engagement and delivering quality public services online.

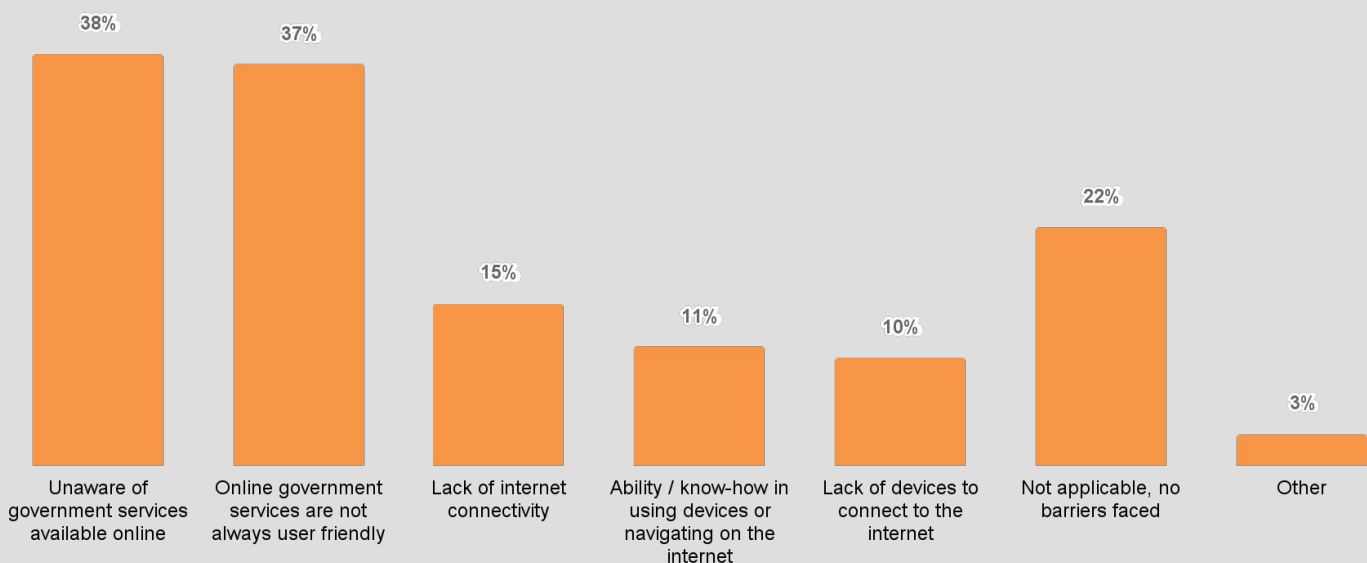
When asked what discourages use of digital government services, limited awareness about what's available is number one. Just behind is unfriendly user interfaces. While concerns over lack of connectivity and suitable devices are less prevalent, they still affect a significant proportion of the population.

“Online services are not as efficient as they should be.”

Digital Nation Survey respondent

Figure 4
Barriers faced

If applicable, what are some barriers you faced in using or accessing government services online?



Awareness, accessibility and satisfaction

Lack of awareness and accessibility is holding back engagement and take-up of government digital services.

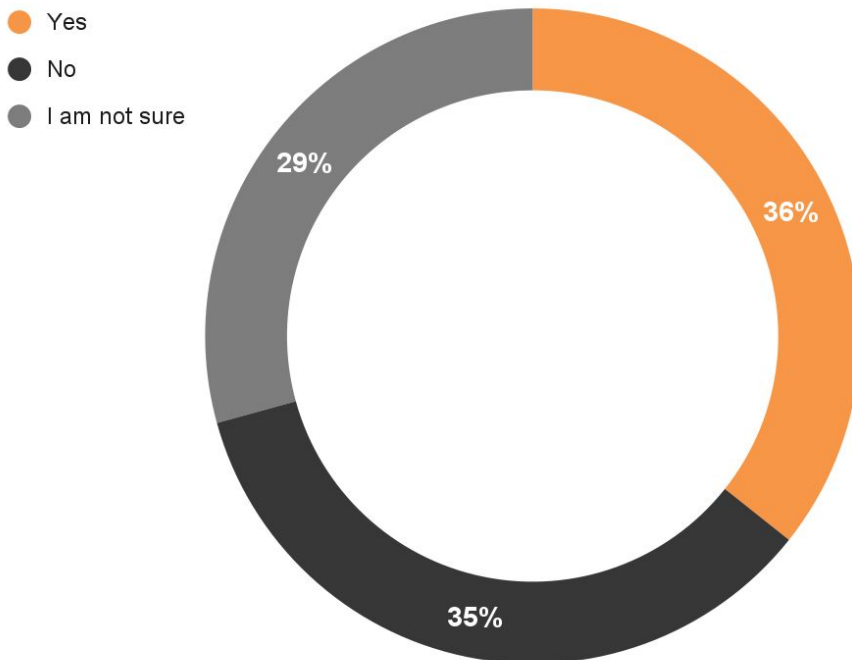
Only 36% of the respondents in our survey are aware of what their government offers online. Nearly 30% aren't sure about what's available and what isn't. Little wonder then that a lack of awareness is arguably the biggest barrier to the development and take-up of government digital services.

Alongside government communications, citizens' advocacy can help to boost awareness. The more people see for themselves the benefits of government digital services, the more they'll spread the word to their friends, family and social media contacts.



Figure 5
Knowing what's on offer

Are you aware of the suite of online services offered by the government?



Boosting access



The survey also highlights the importance of ease, speed and convenience of access in encouraging more people to make use of digital services.

Many government websites and services have been developed as standalone projects by individual departments. It's telling that less than a quarter of survey respondents believe that the policies and processes for government digital services are either predictable or consistent. People therefore find themselves struggling to navigate sites or jumping from one to another. Too much of this and they'll simply give up. A one-stop single point of access, standardised interfaces and more joined up interdepartmental development would therefore boost accessibility and usability.

What also comes through from the survey is the need for education and support in helping citizens make the most of what's on offer.

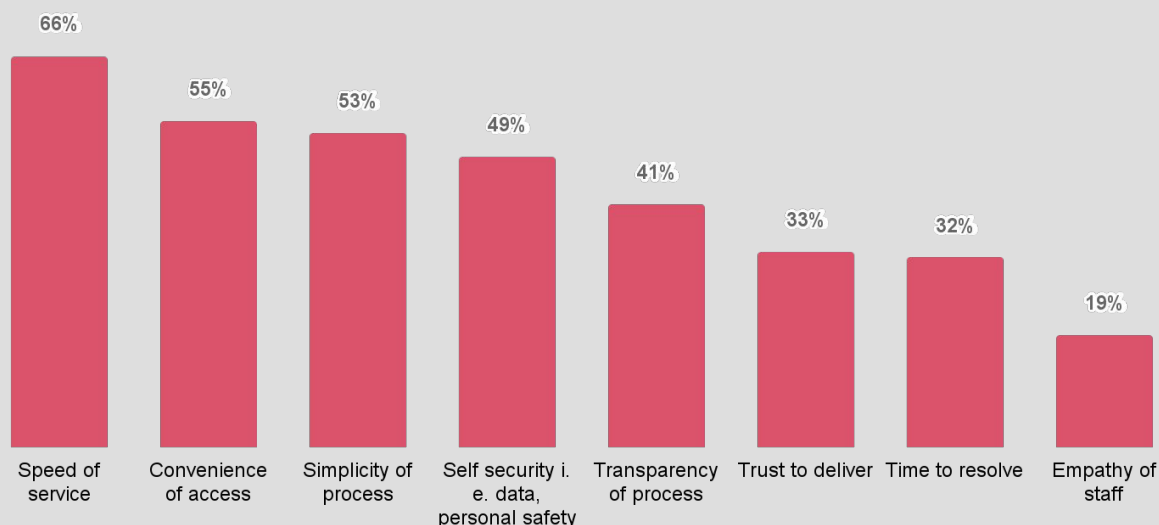
This includes more help for older people, who are among the biggest users of public services, but may not be confident about engaging online. It also includes empathetic staff. "What could I do to make our digital services more user-friendly for everyone? "How can we make sure there is a person to speak to when people are having difficulties or need additional assistance?"

"Older people would require assistance to access online services."

Digital Nation Survey respondent

Figure 6
What would encourage you to go online?

What are / would be some of the most important factors to you in using government services online?



Creating a compelling user experience

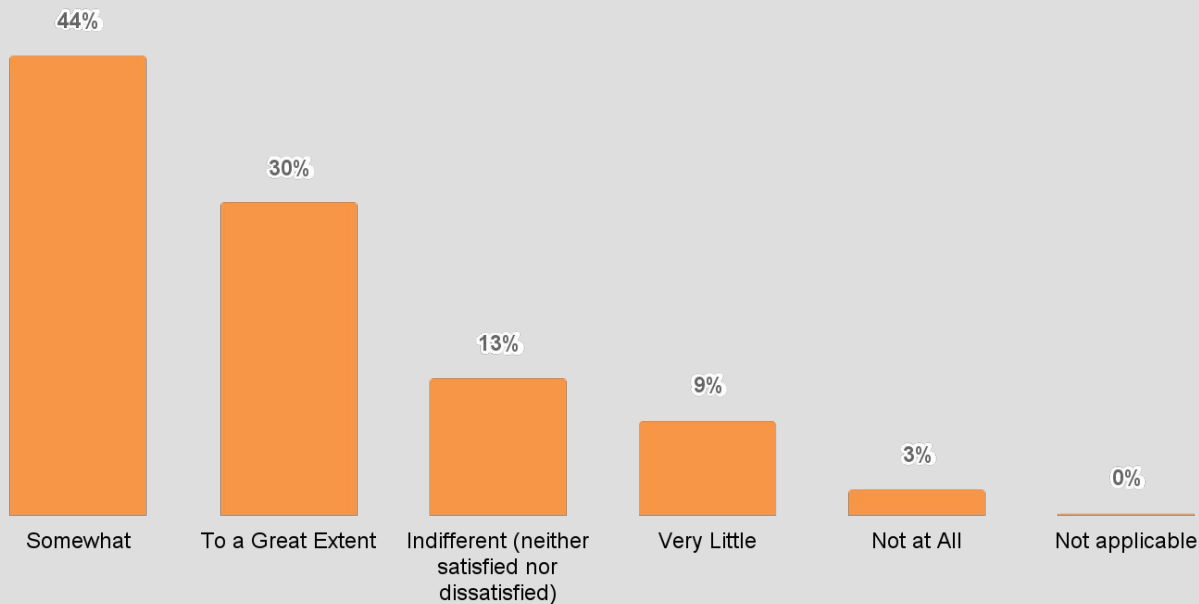


Most respondents in our survey are at least reasonably satisfied with the experience of using government digital services. This suggests that service offerings are heading in the right direction. However, less than one in three are satisfied to a great extent, highlighting the room for further improvement.



Figure 7
Satisfaction with the experience

To what extent were you satisfied with your experience so far in using government online services?



Trust

Government digital services are failing on the basics of trust. There can be no real progress until this trust gap is bridged.

Trust is the linchpin of digital engagement. People won't use digital services or share personal information unless they're sure their data will be secure and used responsibly. It's therefore worrying that so few citizens have faith in the reliability, transparency and security of government digital services.

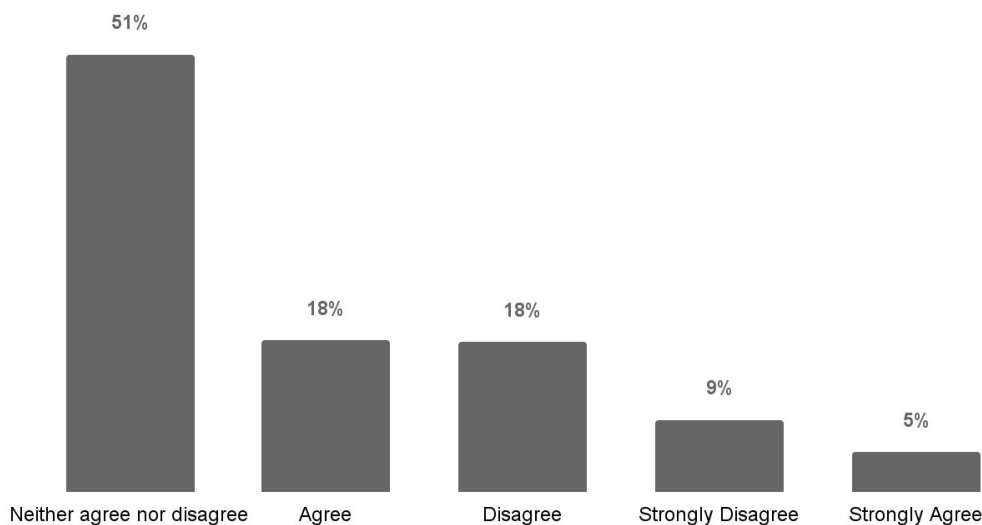
Less than a quarter of survey respondents believe that government institutions use the personal data shared online responsibly and ethically. Less than a quarter believe they can depend on government institutions to support them when they are in need or resolve issues in a timely and efficient manner via online channels.

“I don't trust online services due to scammers.”

Digital Nation Survey respondent

Figure 8
Ethical use of data

Government institutions use my personal data shared online responsibly and ethically





Only **23%** of survey respondents believe that government institutions use the personal data shared online responsibly and ethically.

Digital Nation Survey 2022

Figure 9
Dependability of government digital services

I can depend on government institutions to be responsive to support me when I am in need via online channel

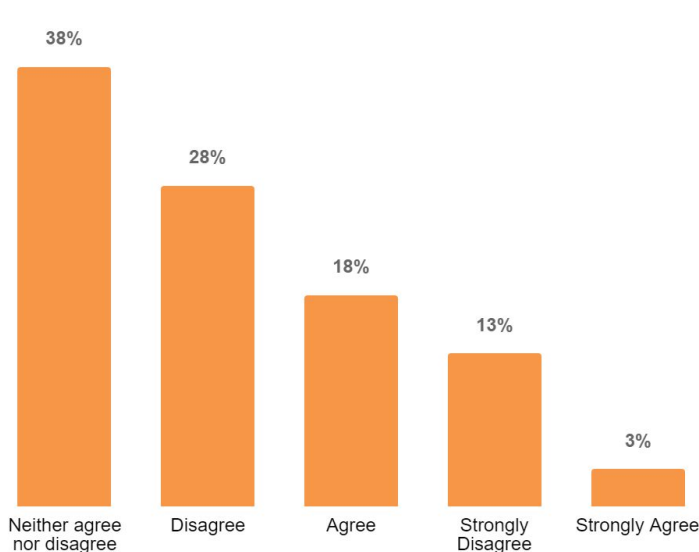
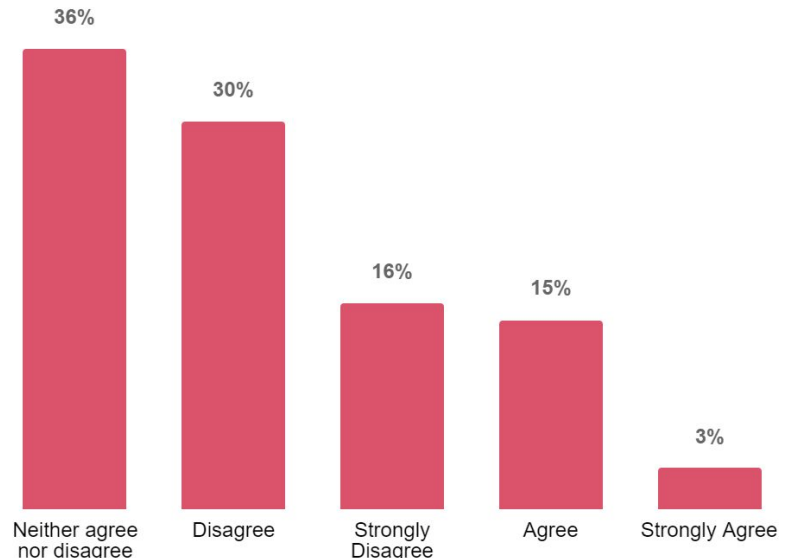


Figure 10

I can depend on government institutions to resolve issues in a timely and efficient manner via online channels



Citizens remain wary



When asked what's holding back increased use of technology in accessing government services, security concerns over the sharing and storage of data came out on top. As cyber attacks continue to increase, this underlines the vital importance of strengthening cyber safeguards.

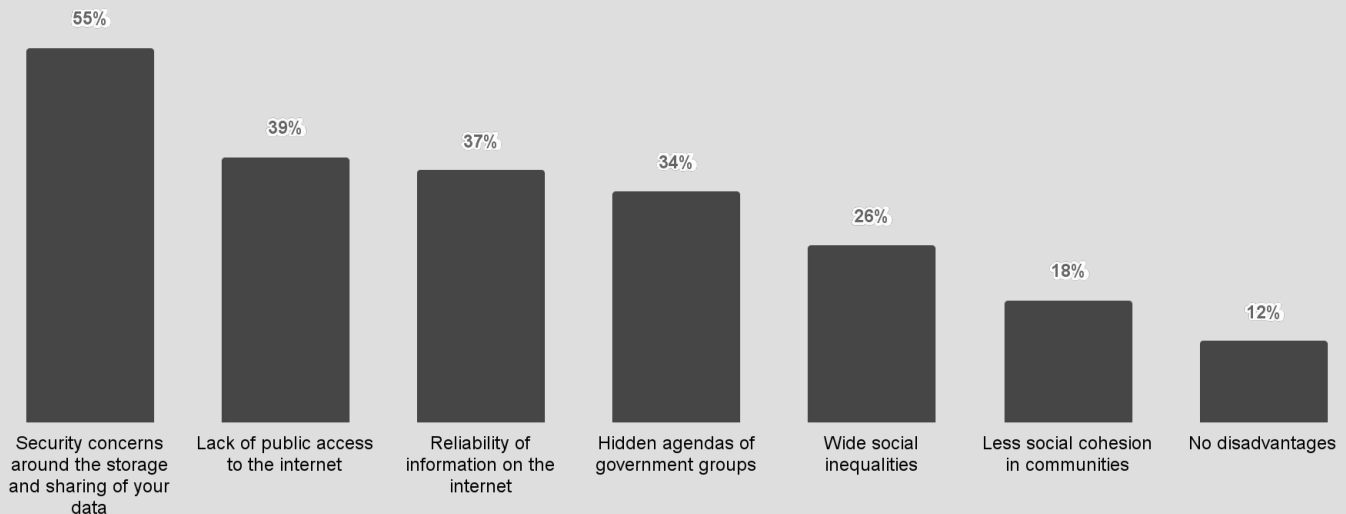
More than a third of citizens also reported misgivings over the reliability of information on the internet and what they view as the hidden agendas within government groups.

This highlights the need for greater care over how information is sourced and communicated. At a time when trust is more fragile and difficult to earn than ever, the findings also underline the importance of the policy and governance needed to make sure that citizens' best interests are paramount across digital services.



Figure 11
What's deterring increased take-up

In your opinion, what disadvantages do you see with the increased use of technology in accessing government services?



Conclusion: Dialling up digital inclusion

How citizens and governments can work together to boost the take-up and value of digital services.

Our citizens' survey highlights important foundations for the development of valuable and valued government digital services. Citizens and governments can build on these foundations by promoting engagement, supporting digital inclusion and, ultimately, fostering trust. Based on the views of survey respondents, three key priorities stand out:

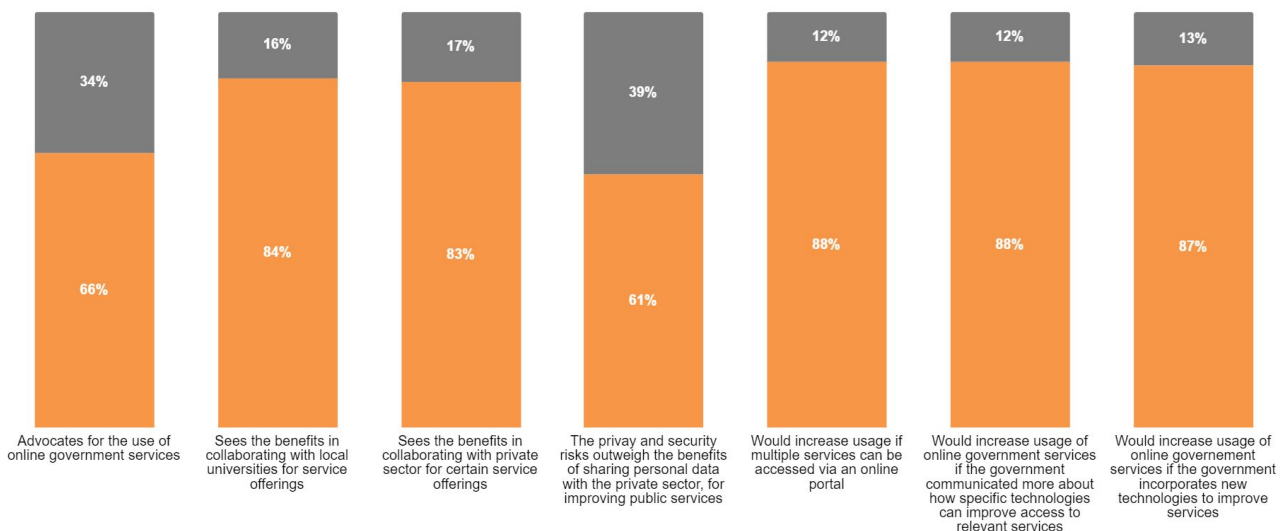
1. Involve citizens early

Citizens aren't passive. They've shown that they want to actively engage with governments in the development of services. For governments, this means reaching out to citizens to ask them what kind of digital services would best meet their needs and how they should be delivered – we hope this survey can be a starting point for this.

Involving citizens early in design and development would give them a stake in the service and make them more willing to use it. It would also help to break down some of the mistrust that discourages them from sharing data and using digital services. To support this, the respondents in our survey want the assurance of transparency over why data is being collected and how it will be used.



Figure 12
Encouraging engagement and uptake





2. Make access easier

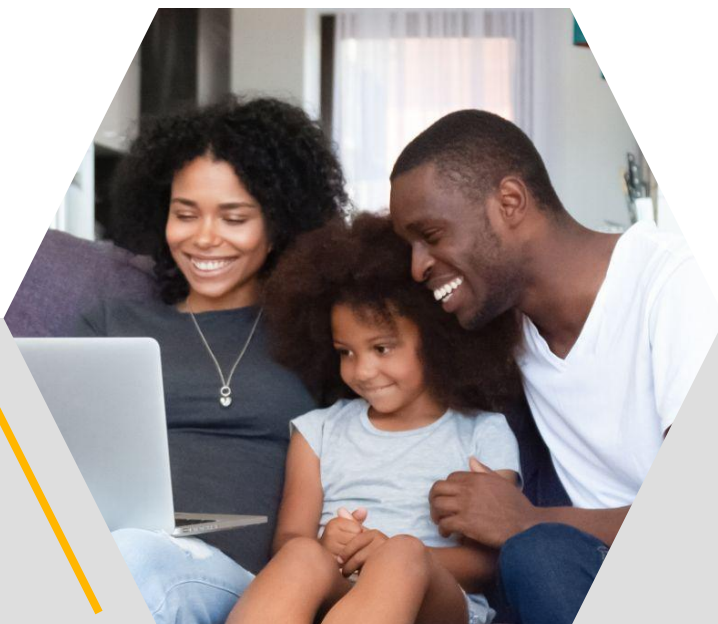
The starting point is bridging the digital divide by improving broadband availability and speed.

But improved access doesn't stop there. A patchwork of different sites and user interfaces could still put people off. One-stop access would overcome this – more than eight in ten survey respondents would be more likely to use government digital services if multiple services could be accessed via an online portal.

To further strengthen engagement and access, citizens would like to know more about what's on offer and more education in how to make the most of the potential. More than eight in ten respondents would increase usage if the government communicated more about how specific technologies can improve access to relevant services (88%).

88% of survey respondents would be **more likely** to use government digital services if multiple services could be accessed via an online portal.

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“Governments need to ensure that implementation is well executed. This means secure, reliable, functioning, user-friendly websites, timely updates of websites, pressure testing and live support.”

Digital Nation Survey respondent

Harnessing the latest tech developments would make services easier to use – more than eight in ten respondents would increase usage if the government brought in new technologies to improve services (87%). The possibilities include using data profiling and interactive engagement to target and tailor services more precisely. This could be supported by seamless channel interfaces that would allow people to move freely from mobile to desktop and then human interaction without having to start the engagement all over again. For example, a user might search for applicable training schemes on their mobile while on the way back from work, then fill out the application form on their computer at home, before following up in person or by phone if needed.

3. Strengthen data protection

To strengthen and sustain trust, citizens need to be confident that their data is secure and being used responsibly.

Security and ethics should be treated as strategic rather than just IT or compliance issues. This includes creating a culture of data protection that works alongside technical defences - especially as [human error](#) is still a factor in the majority of cyber incidents.

From a technical perspective, cyber safeguards clearly need to be robust. But they shouldn't be so overbearing that they impede customer usability and experience. Increased systems integration within a single portal can help to reduce vulnerabilities by simplifying delivery, streamlining security and strengthening oversight.

As part of their communications, governments should also explain the safeguards in place and how effectively they're working. This can help to reduce misinformation and alleviate uncertainty among citizens who might otherwise be excluded.

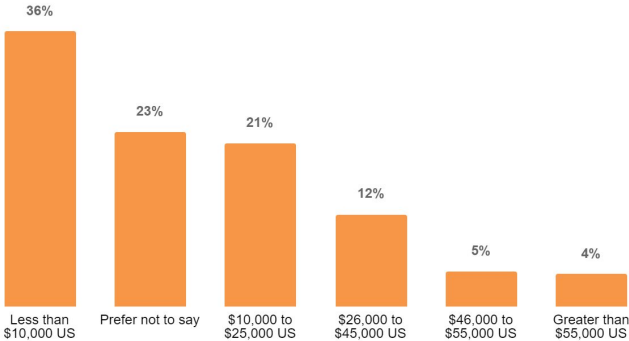


About this survey

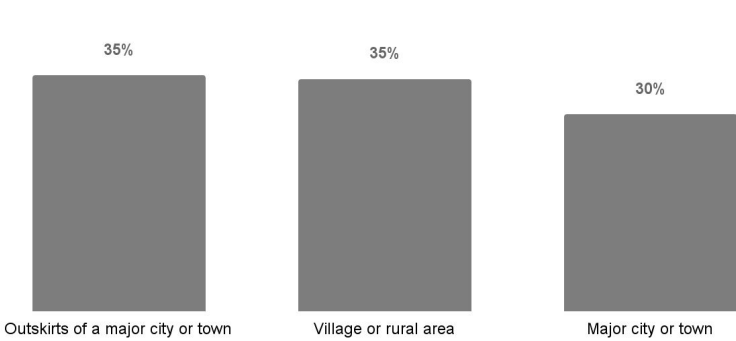
PwC asked 2121 citizens from 15 countries in the Caribbean what they think about government digital services across the five dimensions of attitudes, awareness, accessibility, satisfaction and trust.

The respondents represent a cross section of citizens from different income groups and people living in cities/towns, suburbs and villages/rural areas. The survey population also included people from all ages, though most were in the most digitally connected and active 18-36 and 36-55 age groups.

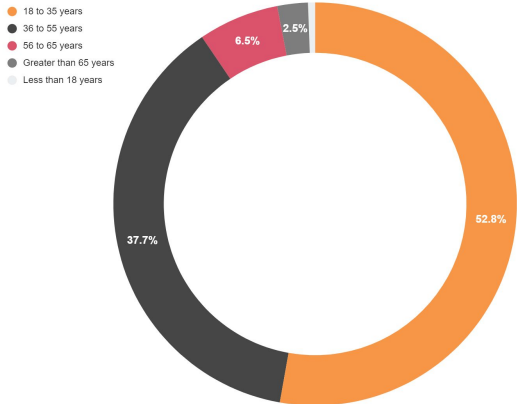
Yearly household income



Area of residence



Age



Get in touch



To have a discussion about the insights and how they can help your organisation please contact us.

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