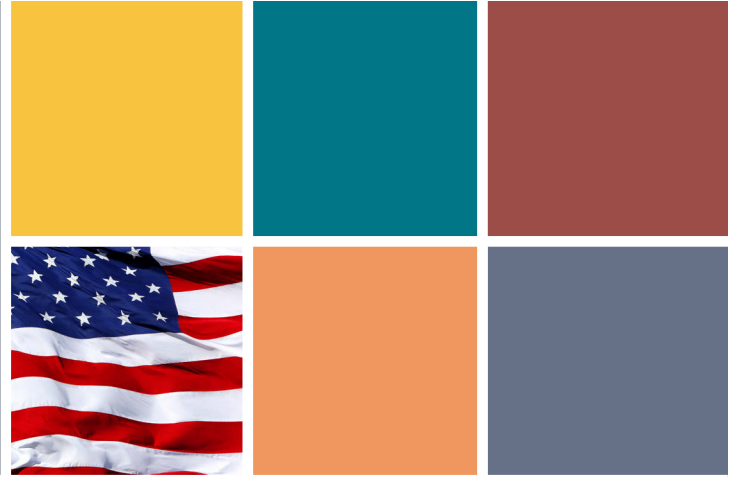# CFI Group

ABOUT THIS STUDY

Conducted by CFI Group, in partnership with the American Customer Satisfaction Index (ACSI), this study is unique in that it measures not only the performance of the agency websites, but also the respondent profile of government website users. Understanding who is using government websites and for what purpose is the first step for agencies in tailoring the content and features to strategically improve website user satisfaction.

GOVERNMENT WEBSITES 2016

ABOUT CFI GROUP

Since 1988, CFI Group has delivered customer experience measurement and business insights from its Ann Arbor, Michigan headquarters and a network of global offices. As founding partner of the American Customer Satisfaction Index (ACSI), CFI Group is the only company within the United States licensed to apply ACSI methodology in both the private and public sectors.   Using this patented technology and top research experts, CFI Group uncovers the business drivers and financial impact of customer experience.

ACSI

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INTRODUCTION AND METHODOLOGY

In late 2015, CFI Group conducted its inaugural Government Websites study in partnership with the American Customer Satisfaction Index (ACSI). This study is unique in that it measures not only the performance of the agency websites, but also the respondent profile of government website users. **Understanding *who* is using government websites and for what purpose is the first step for agencies in tailoring the content and features** to strategically improve website user satisfaction. This report examines the who, what, when, where, and why of the respondent base to illustrate the characteristics of today's government website visitors followed by a comprehensive analysis of the performance ratings using the proven methodology of the American Customer Satisfaction Index, the only national indicator of customer satisfaction.

The information found in this report has been used by agencies to:

➤ Ensure their website is a valued and trusted resource for citizens
➤ Make efficient, informed decisions about resource allocation
➤ Decrease use of more expensive forms of contact

In order to provide an accurate representation of the state of government websites as a whole, CFI Group collected data from users of a wide array of government websites.

Respondents to this year's survey were chosen at random through the use of a market research panel. In order to be eligible for the survey, individuals needed to have accessed a federal agency's website within the past year. In all, 865 completed surveys were collected and used for analysis. Data were analyzed and modeled using the American Customer Satisfaction Index (ACSI) methodology. The ACSI is the only uniform, national, cross-industry measure of satisfaction with the quality of goods and services in the United States. A key distinguishing features of the ACSI is its patented scientific approach to customer satisfaction measurement.

RESPONDENT PROFILE

Who is visiting the websites?

An examination of who is accessing government websites reveals the following:

➤ At the aggregate level, visitors are slightly skewed toward male users, as 54% of respondents are men.

➤ Nearly half of all visitors (47%) are between 25 and 44 years old. According to the 2010 US Census, only 27% of the actual population falls into this category, illustrating the relative heavy usage rate for these citizens.

➤ The 45-64 year old age group is also overrepresented, as these individuals account for 37% of government website users but just 26% in the US at large.

➤ The remaining users are filled out by mostly older citizens—12% of the total base is 65 or older compared to the 4% under 25.

The fact that government website users are overrepresented by millennials and younger adults is unsurprising as these generations usher in the new norm of a **tech-savvy population that often starts with the Internet when seeking information**.

The educational background of government website users shows **this group is well educated**:

➤ 68% of all respondents are college graduates.

➤ Another 23% said they have completed some college or earned an associate's degree.

This well-informed group of respondents is likely to have a high sense of value for their time, making an efficient and productive experience on the website important in keeping their satisfaction high.

What are the common forms of contact?

While this study focused on the experience citizens have specifically on an agency's website, it is important to understand how this website experience compares with the other methods available for an individual to interact with an agency. Demonstrating the substantial exposure of the websites, **81% of those surveyed said the majority of their contact with a government agency was with the website**. All other means of contact pale in comparison—with 5% citing Social Media, 3% for both E-mail and Phone, and lesser percentages for U.S. Mail and in-person office visits. The high website usage can be expected to continue as funneling individuals toward these sites is advantageous for both citizens who are able to access desired information at their convenience, and the **agencies themselves that profit from saving money on staffed call centers and other higher cost resources**.

When are individuals accessing the site?

Respondents to the survey were also asked the time of the day (Figure 1) they most often access government websites:

➤ With 61% of the total responses, the majority access the site during regular business hours.

➤ Another 26% said they typically log on to the site in the evening after business hours, which again speaks to the value of the website as a resource that can provide citizens with information without the need for a continually staffed call center. In fact, **91% of those who most often access the site after business hours reported that they accomplished their task**—a higher rate than the 88% of the visitors during business hours who accomplished their task.

Individuals were also asked how often they typically visit the government website they were rating. The data reveals that the **typical visitor is relatively inexperienced with the site as 23% said it was their first visit and another 49% said they visit every few months or less**. This is an important observation as website managers need to understand that the majority of users will not have much, if any, background knowledge of the site and speaks to the need for presenting a homepage with very basic information, intuitive menu options, and links to guide users to the information they need. The group of frequent website visitors (12% of the total base who said they visit the site at least weekly), gave lower ratings for all main components of the website experience compared to the infrequent or first time visitors, an indication of their relatively higher expectations of the site's offerings.

Where are people logging in from?

As technology enhancements drive increased Internet traffic through mobile and a generation of tech-savvy individuals reaches the age of being more likely to contact various government agencies, it becomes even more important to know the tendencies and desires of the public when it comes to online government contact.

Our study also reveals:

➤ Demonstrating the prominent role of mobile access in general, **65% of respondents reported they use their phone for Internet access**. In fact, 31% of all those surveyed indicated that mobile phone use accounts for at least half of their total Internet access.

➤ However, **the majority—79%—of all respondents said a desktop or laptop was their most used method** of accessing the government website they rated.

➤ Another 10% of respondents indicated a tablet was their primary form factor, leaving 11% who said they use their mobile phone most often to access the site.

Although the role of the mobile phone accounts for a large portion of a typical individual's Internet access, **when it comes to contact with a government agency, the full desktop site remains the public's primary mode of access**.

The fact that a relatively small percentage of individuals are accessing government websites using their mobile phones **does not mean that agencies should abandon investments in developing mobile resources**. Data shows that while only 8% of all respondents downloaded apps from the website for use on their phones, this group's satisfaction—measured on a 0-100 scale—was 11 points higher than those who had not (Figure 2).
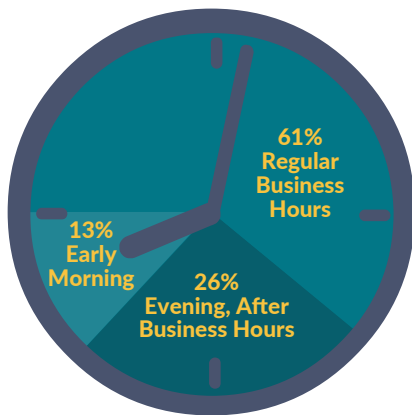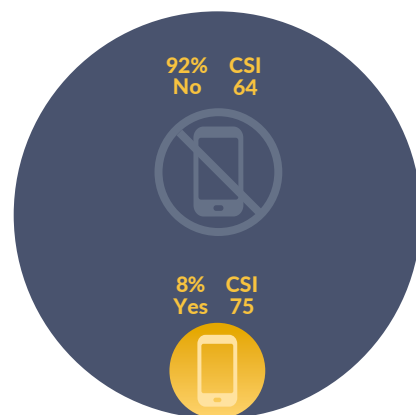
Figure 1: Time of Day Visited

61%
Regular
Business
Hours

13%
Early
Morning

26%
Evening, After
Business Hours

Figure 2: Downloaded Mobile Apps?

92%   CSI
No   64

8%   CSI
Yes   75

While the use of mobile phones for government website access gains some traction, there is less evidence that the role of social media has a tangible effect on online government contact as a whole. Only 6% of respondents reported their most recent experience with a government agency was through social media, and this group's satisfaction of 63 was slightly lower than the remaining 94% who had last used an agency's website.

In spite of the emphasis on social media across many industries, there is little indication of an appetite among government website users for this type of interaction or mode of information retrieval. The **priorities for agency website performance should lie first with the core desktop site** followed by the inclusion of mobile options to complement the main site.

Why are citizens visiting government websites?

The majority of government website users are seeking information, but there is notable distinction in the performance ratings for the 40% of all respondents who are searching for *specific* information and the 31% who said they are browsing for *general* information. **Those looking for specific information rated satisfaction at 61, eight points lower than the CSI score of 69 for general information browsers**. Looking for specific information indicates a more targeted goal and a greater chance to fail in accomplishing a specific task. Providing quick links to frequently sought after information and a clear outlet for additional help gives users the ability to accomplish their intended task quickly and leads to higher levels of satisfaction.

Other common reasons for visiting a government website include:
- ➤ Perform a transaction (17%)
- ➤ Check benefits information (15%)
- ➤ Download a document (10%)

The widespread purposes citizens have in accessing these websites sheds light on the job that agencies are charged with—to provide numerous offerings that individuals can access efficiently to carry out their intended task.

How are government websites performing?

Citizens rated their overall level of satisfaction, as measured by the Customer Satisfaction Index (CSI), at 65 on a 0 to 100 scale. This baseline measurement indicates there is considerable room for improvement in satisfaction and its drivers that will lead to an increased likelihood that users will return in the future and recommend the site to others. **The following analysis identifies elements of the website that matter most in driving satisfaction and calls out where efficiencies can be gained for website visitors across key segments**. Agency website managers will be able to use this data and analysis to provide context to their own measurements, and inform resource allocation decisions at the aggregate level, in an effort to improve user satisfaction.

Using the American Customer Satisfaction Index (ACSI) methodology, the most influential drivers of government website satisfaction as a whole are *Functionality* and *Navigation*.

Navigation has traditionally been a top priority satisfaction driver for websites across all industries. This pivotal aspect of a website drives the experience and controls how efficiently a user is able to carry out their intended task. Qualitative feedback left by respondents in this year's study contained several comments regarding the website's navigation, frequently expressing a desire to see the process made more efficient and user friendly by reducing homepage clutter. Websites that include an abundance of information on a busy homepage make navigating the site cumbersome and cause frustration among visitors looking for information. Identifying the common tasks and specific materials often being sought should steer managers toward developing a streamlined *Navigation* process that efficiently guides a user to their desired information.

The *Functionality* of a website, measured by the usefulness of its features and the ability to help its users accomplish a task, is a fundamental aspect of the online experience. Sound functionality that limits frustration is essential in maintaining high satisfaction. While the overall *Functionality* rating was 68, there is a notable range of scores across the various departments measured, ranging from 60 at the lower bound and extending to the high 70s. This is another indication that agencies with a commitment to keeping their website up to date and optimizing its offerings to users will see the results in visitors' performance ratings.

The wide range of scores illustrates that higher ratings are possible for those agencies whose website visitors have relatively lower levels of satisfaction. Agencies that invest in improving the site in meaningful ways will see an increase in satisfaction and, ultimately, a rise in usage through return visits and word-of-mouth recommendations to others.

GOVERNMENT WEBSITE SATISFACTION MODEL

The Government Website Satisfaction Model (Figure 3) demonstrates the relationship between satisfaction, its drivers and future behaviors. The drivers that influence satisfaction range from the aesthetics (*Look and Feel*) to the technical aspects of the experience (*Site Performance*). **Improvements in any of the areas on the left side of the model will have a direct impact on satisfaction**. Satisfaction, in turn, will drive future behaviors, such as return visits and personal recommendations.
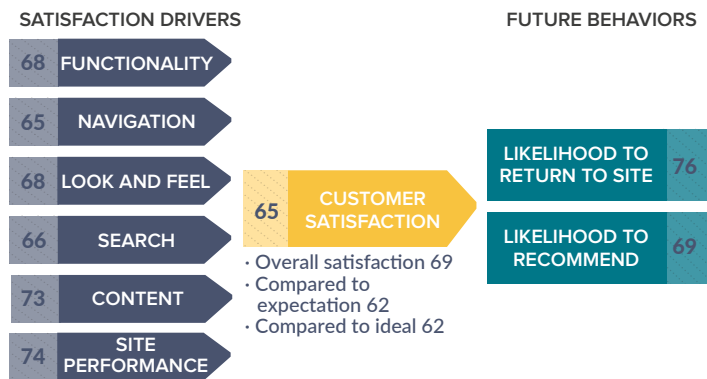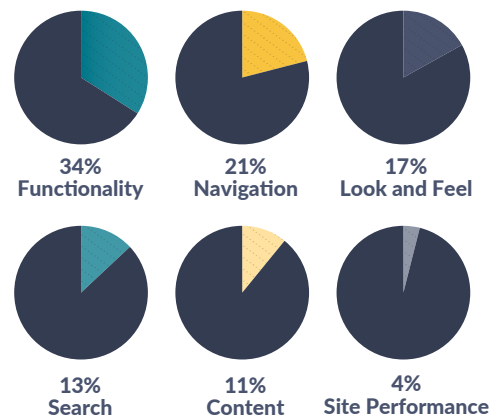

Figure 3: Government Website Satisfaction Model

SATISFACTION DRIVERS

68 FUNCTIONALITY
65 NAVIGATION
68 LOOK AND FEEL
66 SEARCH
73 CONTENT
74 SITE PERFORMANCE

65 CUSTOMER SATISFACTION
· Overall satisfaction 69
· Compared to expectation 62
· Compared to ideal 62

FUTURE BEHAVIORS

LIKELIHOOD TO RETURN TO SITE 76
LIKELIHOOD TO RECOMMEND 69

Figure 4: Relative Driver Leverage on Website Satisfaction

34% Functionality
21% Navigation
17% Look and Feel
13% Search
11% Content
4% Site Performance

In order to prioritize improvement efforts, quantitative "impacts" are calculated to measure which drivers provide the greatest leverage on satisfaction at this time. Figure 4 illustrates the relative impact values of the model's drivers, highlighting the pronounced influence of site *Functionality* and *Navigation* on the overall level of satisfaction. Aspects of the website experience that score lower but have a relatively high impact represent key opportunities for improvement. In general, *Functionality* and *Navigation* both fit this description—making them top priorities. Individual agencies should analyze their own website's score and impact values to identify these top priority areas to determine the most efficient use of resource allocation rather than relying on the government-wide dataset shown here.
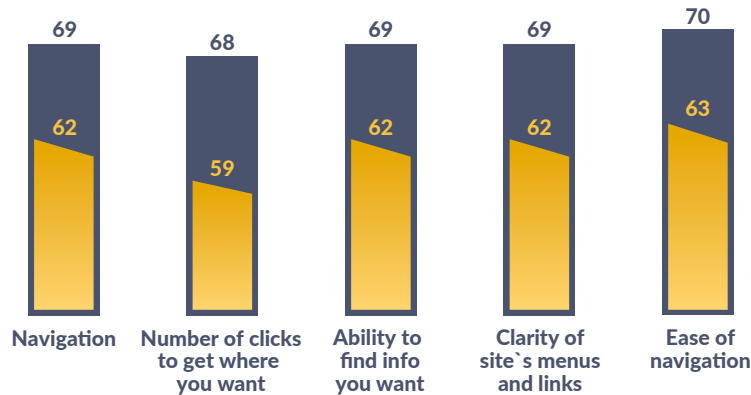
NAVIGATION

As our study has shown, the ability to navigate a website, whether in the public or private sector, is one of the most integral aspects of the site experience for users. Without a clear presentation of the materials and an intuitive means of locating information, frustration and dissatisfaction are likely outcomes. In the aggregate model, *Navigation* **receives the lowest score of all satisfaction drivers**, indicating an opportunity for many agencies to improve in this regard, and experience an immediate and profound improvement in their CSI.

Many respondents cited better navigation as their primary recommendation for improvement of the website they accessed. Common themes found in these recommendations involve **minimizing clutter on the main pages while providing quick links to the most frequently trafficked areas of the website**. Government agency web managers and designers are presented with the challenge of including a broad spectrum of information while making it easy for users to quickly access precisely what they are looking for. Identifying the most common tasks carried out on the site and then providing an outlet for quick access to that material will help improve the *Number of Clicks to Get Where You Want* attribute rating. **Its score of 63 represents the lowest scoring attribute of the satisfaction model**.

Overall, government websites have stronger *Navigation* scores among those looking to browse the site for general information rather than searching for specific material related to a program or policy. Figure 5 illustrates the significant differences in the *Navigation* ratings among these two groups.

Figure 5: Navigation Scores by Search *Specific* or *General* Information (above bar)

Navigation	Number of clicks to get where you want	Ability to find info you want	Clarity of site`s menus and links	Ease of navigation
69	68	69	69	70
62	59	62	62	63

This disparity speaks to the need to provide an efficient means for individuals to access specific policy and procedure information that can prove more difficult to find when accessing a series of menus.

The influential *Navigation* driver is often rated lower than the other components of the online experience. However, the agencies that are able to identify the most sought-after information and offer user-friendly links or other means of accessing those materials will be able to make significant gains in this critical component of satisfaction.

FUNCTIONALITY AND METHOD OF ACCESS

As the most influential driver of satisfaction, an agency website's *Functionality* is a fundamental part of the site experience. The *Functionality* score of a website is composed of the *Usefulness of the Features/Services on the Site* and the *Site's Functionality helps Accomplish a Task attributes*. At the aggregate level, **each of these metrics rated a 68, but there are key insights to be found across various segments of the data**.

The method of accessing the website causes notable differentiation in *Functionality* scores (Figure 6). For the 79% of respondents who said they most often access the website using a desktop or laptop computer, *Functionality* was rated a 69 compared to a slightly higher 71 for the 11% of respondents who most frequently access the site on a mobile phone. The main differentiation comes from the score of 62 in *Functionality* satisfaction provided by the remaining 10% of respondents who access the website most frequently via a tablet.

Functionality ratings also varied across the individual departments measured in the study (Figure7). Looking at a variety of departments covered in the study, *Functionality* was rated highest for the Department of the Interior (78) and lowest for the Department of Justice (60).

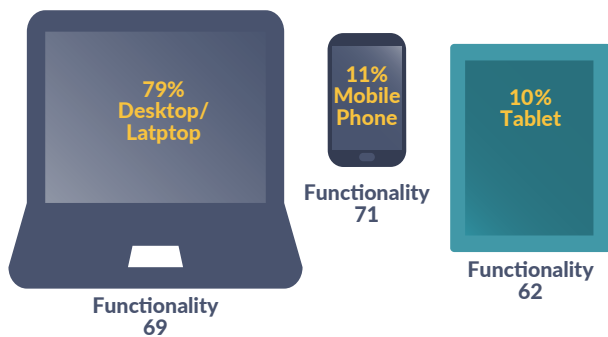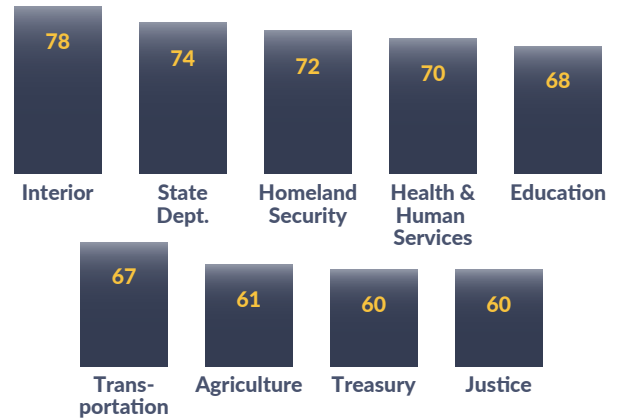Figure 6: Method of Website Access with Functionality Score

Figure 7: Functionality Score by Department

This variation shows the potential for agencies who find themselves at the lower range of the spectrum. Websites that incorporate user friendly features, and provide an efficient means of carrying out common tasks are more likely to achieve high functionality ratings and ultimately yield an improved level of satisfaction.

FREQUENCY AND REASON FOR VISIT

In addition to learning what aspects of the website experience influence satisfaction, it is critical to understand which visitor segments are most frequently satisfied with the site as well as the most common reasons for visiting the site. **Individuals who reported visiting a particular government website frequently (at least weekly) were associated with lower satisfaction compared to infrequent or first time visitors**. Figure 8 shows the 12% of respondents who visit a government website frequently rated their satisfaction at 58 on the 0 to 100 scale. Infrequent visitors accounted for 64% of the total surveyed population had a collective CSI of 66, equal to the rating provided by the 23% of respondents who reported their recent government website experience as their first.

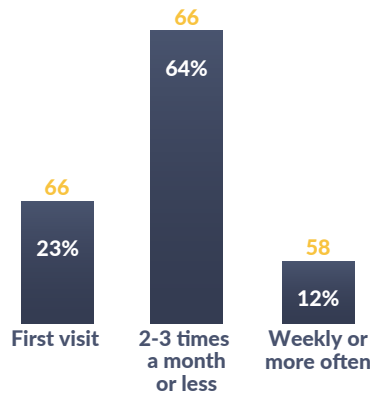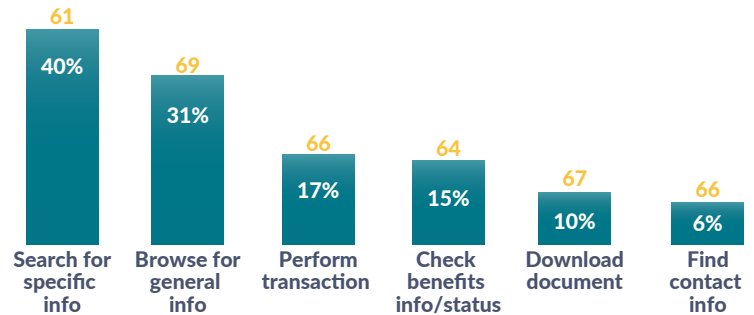Figure 8: Frequency of Website Visit with **Satisfaction Score** (above bar)

Figure 9: Primary Purpose for Visiting with **Satisfaction Score** (above bar)

Further inspection into what is leading this relatively lower satisfaction among frequent website visitors is made possible by reviewing this segment's comments. Prevalent themes in this group's qualitative feedback include **the need for better site organization as well as a more refined search process**. Given that frequent visitors who are more familiar with the website report an inefficient search process indicates a real need for agencies to ensure that their site's search tool returns relevant results and assists individuals in getting to the information they need efficiently.

Validating this need for an effective searching resource is the discovery that **searching for specific information is the leading purpose for visiting a government website** at the aggregate level. Figure 9 shows that 40% of respondents cited searching for specific information as the primary purpose for visiting and **this segment had the lowest collective CSI of any of the response options** at 61, four points below the aggregate. Browsing for general information was selected by 31% of respondents as their primary purpose of visiting the site.

Although the Search component is not a key driver in terms of its direct impact value, the importance of maintaining an effective tool for visitors to find specific information is clear in that a high percentage of individuals utilize this resource and often find its functionality to be lacking.

CONCLUSION

With a debut score of 65, the Customer Satisfaction Index among government website users indicates agencies' online offerings are generally lagging behind private sector performance, and reveal specific areas where there is room for improvement. In general, **agencies should allocate resources toward the key drivers of *Functionality* and *Navigation*** in an effort to enhance user satisfaction of their website. For many agencies, these components exert the greatest leverage to drive satisfaction, but their performance ratings have been shown in this report to vary across key segments.

As citizens become increasingly more proficient in navigating websites and use online resources as the primary tool for gathering information, high quality websites for government agencies play a vital role keeping user satisfaction high—benefiting both the citizen and the agency.

In order to achieve optimal performance and visitor satisfaction, agencies should examine what information matters most to their own site's users. Understanding what moves the needle on satisfaction will ultimately increase usage and advocacy for the site, and will equip decision makers with the knowledge of where smart, strategic investments to the website need to be focused. This well-informed approach is essential to ensure your agency's website is a trusted tool that enables users to get what they need efficiently while conserving valuable agency resources.