2025

Government Experience Trends Report

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Introduction

There is no doubt that 2025 is shaping up to be a year of huge transformation for government agencies across the globe. This report presents the findings of our studies into the customer and employee experiences with government services, identifying three critical areas of strategic focus for the year 2025: Trust, Productivity, and Resilience.

The efficacy of governmental service delivery is fundamentally predicated upon public trust. And employees—those engaged in direct service interactions and those responsible for policy, program design, and operational functions—need organizational trust to perform at their best.

The imperative for enhanced productivity within government is being accelerated by persistent change, fiscal constraints, and efficiency initiatives. This pressure extends beyond employee engagement—it directly impacts citizen expectations. Customers are looking to get what they need, when they want it, the first time they seek it.

Resilience in the face of unexpected challenges has emerged as a core competency for government agencies. Customers affected by natural disasters, cybersecurity breaches, or pandemics, rely upon governmental support for recovery. For government employees, disruption such as austerity measures and other fast-moving initiatives to increase government efficiency, or the slower erosion of resources while expectations increase, need resilience to maintain operational continuity. By keeping human experience at the center of their choices, government leaders can deliver trust, productivity, and resilience for their customers and employees.

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DATA AT A GLANCE

State of experience with government agencies

MEASURING EMPLOYEE EXPERIENCE IN GOVERNMENT

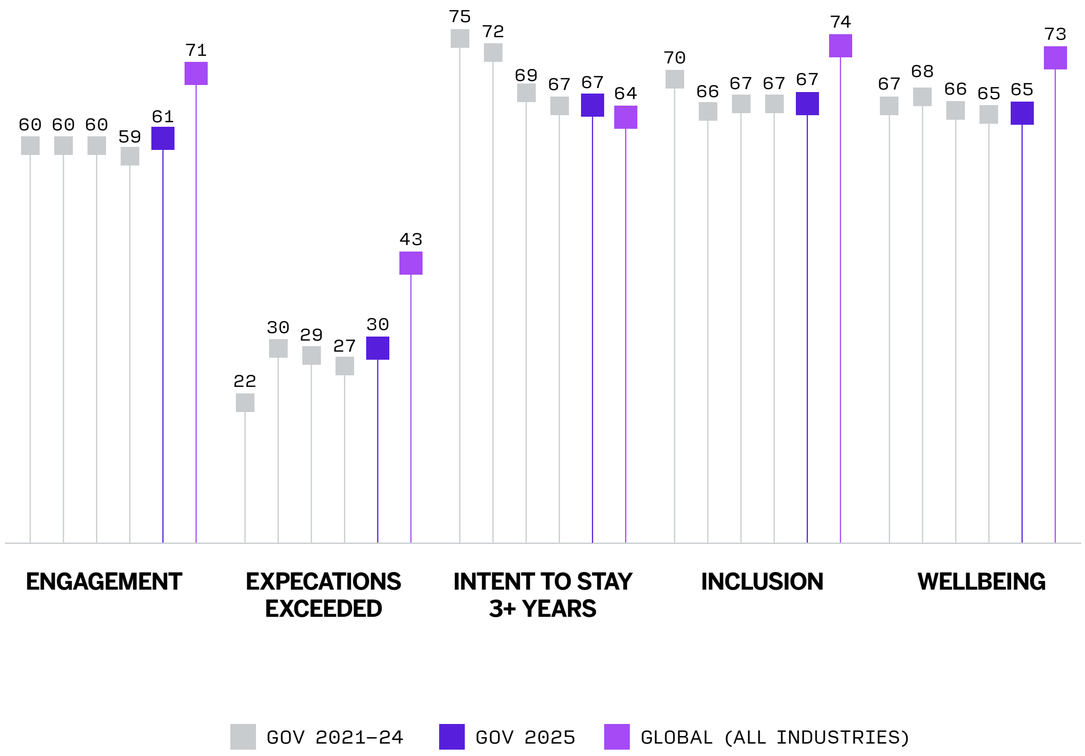
Qualtrics research measures the key performance indicators (KPIs) for employee experiences that lead to positive organizational results (see methodology for the KPIs and their definitions). While commercial organizations measure results in terms of market share, growth and profit, government organizations look for mission effectiveness (for example, public health organizations seek to reduce the spread of infection, lower maternal and infant mortality, etc.), efficient use of public resources, and citizen trust.

GLOBAL GOVERNMENT EMPLOYEE KPIS % FAVORABLE IN 2025

This year, governments around the world continue to lag behind their commercial counterparts—except for intent to stay, which has leveled out after falling steadily since 2021. Inclusion and wellbeing are holding steady in government while rising slightly in all other industries, suggesting a loss of momentum that could jeopardize governments' ability to tap into employees' diverse capabilities and protect against burnout.

Government organizations are improving engagement by helping employees see the connection between the work they do and positive outcomes for themselves and the world around them. And government employers are making gains on exceeding employees' expectations, by supporting them through change, meeting compensation needs, listening to ideas, and ensuring manager behaviors match espoused values.

THE STATE OF EMPLOYEE EXPERIENCE IN GOVERNMENT



MEASURING CUSTOMER EXPERIENCE IN GOVERNMENT

This year's drop in both KPIs should be cause for concern for government leaders seeking to improve organizational effectiveness. The experience gap between customers' interactions with government and other industries also needs to be closed. Government leaders should look to other industries for inspiration and consider adopting similar strategies, methods and tools.

CUSTOMER SATISFACTION RATINGS

GOVERNMENTS ARE DELIVERING. BUT HOW EFFECTIVELY?

Across the globe, organizations are delivering better customer experiences—except for government. In fact, for the past four years customers have consistently rated their satisfaction with government the lowest of all industries measured in this study. The double digit experience gap between government vs all industries should serve as a wakeup call for government leaders to put customers at the center of their efforts.

Customers are 10 points more likely to report a poor experience with government interactions than the cross-industry average. The top two reasons: Communication problems and how employees interact with them. Disengaged or burned out employees can't deliver the human connection customers crave. Unfortunately, government employees' experiences have stagnated—and can be expected to decline in the future as austerity measures and rapid change take their toll.

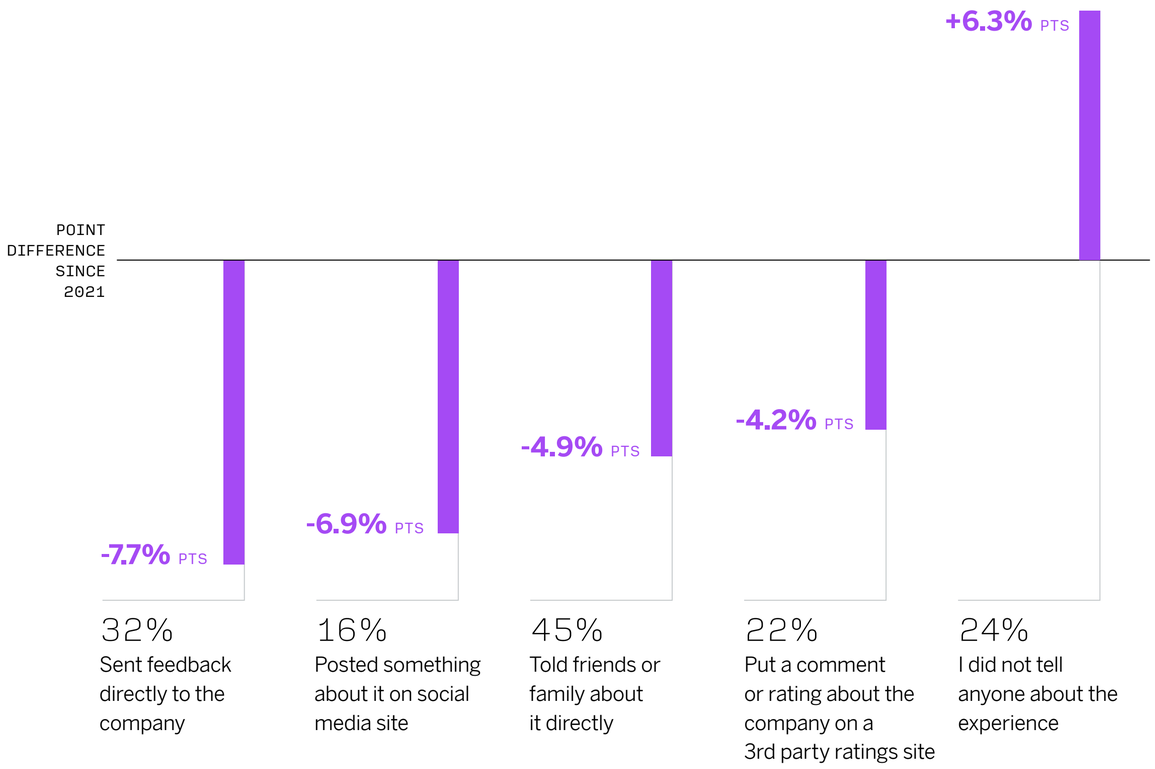
The good news is that employees and customers both want the same thing—to see customer needs met effectively. In fact, the most engaged government employees are those who feel empowered by processes that enable them to effectively meet customer needs, and who are encouraged to develop new ways of serving them.

THE PERCEPTION OF GOVERNMENT EFFECTIVENESS FROM CUSTOMERS AND EMPLOYEES

When unhappy customers vote for leaders promising disruptive change to improve their experiences, the government workforce absorbs the implications of what the changes actually mean. This usually results in reductions in force, hiring freezes, and fewer training investments which put added pressure on the government workforce to deliver more with less. And isn't that a part of the problem in the first place? Employees need support to successfully navigate change and make their work less chaotic. However, when that change is designed for disruption, the workforce carries this burden.

Government employees believe deeply in the values of effective services to the public, and want to see their organization continuously improve how work gets done. But making service improvements based on feedback is only going to get harder, as customers are simply not giving feedback like they used to. Rather than sending feedback directly to the service provider, more and more customers are saying nothing at all. As a result, government organizations are operating blind when only one-third of customers say they sent feedback to an organization after either a positive or negative experience. Like their industry peers, government leaders need to look for *more ways to understand* what customers are actually experiencing, in order to surface the insights they need to drive positive change. Doing so will result not only in improved outcomes for customers, but a more engaged workforce that delivers better experiences for those they serve.

HOW CUSTOMERS ARE PROVIDING FEEDBACK ABOUT A BAD EXPERIENCE... OR NOT



STRATEGIC ADVICE

OPTIMIZING CUSTOMER AND EMPLOYEE EXPERIENCES WITH GOVERNMENT

Government employees want to see their organization continuously improve how it delivers services to the public. When governments *ask their employees for feedback*, they not only tap into the rich insights of the people who interact with customers every day—they also create a more engaged workforce that delivers better results. Governments need customer feedback to know what improvements to prioritize, and should leverage *innovations in technology* that make it easy to collect and analyze structured and unstructured experience data across channels.

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01

TREND 1

Trust is tenuous—especially for government

When governments around the world show year over year declines in trust, we all need to be concerned. Democratic systems rely on trust to work effectively; the voting public must trust their government to respond to their feedback, or they will stop participating constructively in civic life. For employees, trust in leadership is a key driver of engagement, wellbeing and performance. Governments are struggling on both fronts.

TRUST IN GOVERNMENT CONTINUES TO DECLINE

Customers' trust in the government is a whopping 11 percentage points lower than their trust in all industries. Other industries are investing in improving customer experiences—creating *continuous listening programs* across all channels so they can keep their finger on the pulse of shifting needs, preferences, and experiences. And industries recognize that it is equally important to *act on feedback* and clearly communicate to customers how you are addressing their concerns.

EMPLOYEE TRUST IN LEADERSHIP

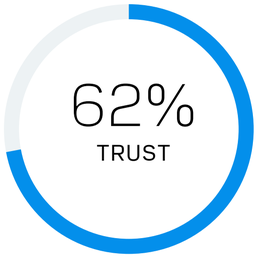
49%

OF GOVERNMENT EMPLOYEES WORLDWIDE RATED THEIR TRUST IN LEADERSHIP AS FAVORABLE

Global average is 63%

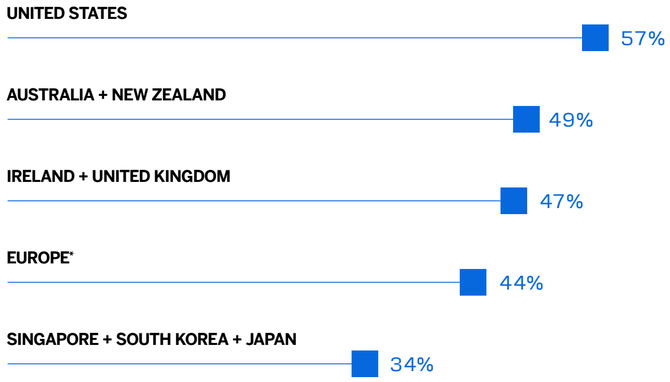
THE STATE OF GLOBAL GOVERNMENT CUSTOMER EXPERIENCE IN 2025

−2.2% PT FROM 2024
−16% PT FROM GLOBAL



−1.6% PT FROM 2024
−11% PT FROM GLOBAL

GOVERNMENT EMPLOYEE TRUST ACROSS THE GLOBE



* EU (Germany, France, Italy, Denmark, Netherlands, Spain and Sweden)

Listening matters for employee trust as well: In all industries, employee trust is directly related to how frequently they are able to give feedback. However, employees in government have fewer opportunities to speak up. While annual employee listening remains the most prevalent practice, organizations that solicit employee feedback monthly, weekly or even daily see the highest levels of employee trust.

Unfortunately, employees' trust in their organizational leaders lags behind all other industries by 14 percentage points. Less than half—41%—of government employees believe that senior leaders would choose people's wellbeing over immediate organizational results, 15% points lower than the global average.

EMPLOYEE TRUST IN SENIOR LEADERS HAS THREE ELEMENTS

1. Competence
Leaders have the skills and knowledge to do their job well

2. Integrity
Leaders behave in a way that's consistent with the organization's values

3. Benevolence
Leaders will choose people's wellbeing over immediate profit or gain

+7%

HIGHER TRUST LEVELS FROM GOVERNMENT EMPLOYEES WHO ARE LISTENED TO AT LEAST MONTHY, COMPARED TO ANNUALLY

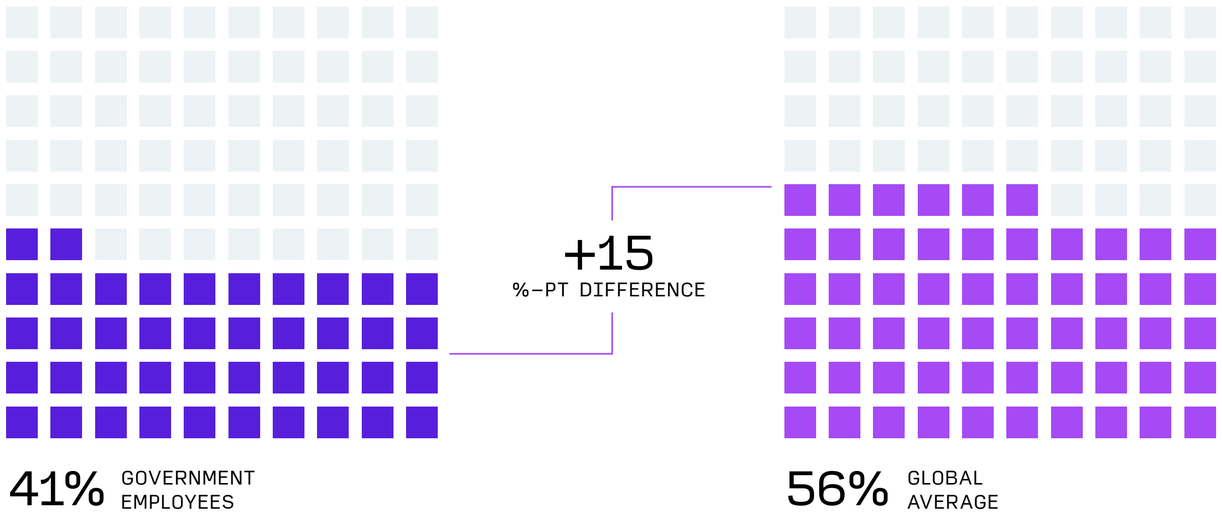
01

STRATEGIC ADVICE

INVESTING IN THE ABILITY TO LISTEN, UNDERSTAND, AND ACT

Governments must invest in their capabilities to *listen, understand, and act* on feedback from their customers and their employees. Following industry best practices, governments should *adopt the tools industries rely on* to quickly and effectively gather experience data across all the channels customers and employees use to interact and communicate their feedback. Closing the loop with individuals who take the time to provide feedback is the only way to demonstrate that you take their input seriously. And acting quickly to make improvements to service delivery will improve customer and employee trust—making democracies more stable and durable.

EMPLOYEES WHO BELIEVE SENIOR LEADERS WOULD CHOOSE PEOPLE'S WELLBEING OVER IMMEDIATE RESULTS



02

TREND 2

Resilience is the antidote to chaos

When faced with disruption, humans look for ways to manage risk and restore stability in their lives. Governments play a key role in providing this sense of stability and risk management—for customers as well as the employees who are responding at the same time that they often are themselves affected.

Customers are embracing the disruptive innovations in technology that make *personalized interactions* possible. The majority of customers—64%—want their interactions with service providers to be personalized. And nearly half of customers are comfortable with organizations using data from their website interactions and purchase history to achieve that personal touch. But the majority of customers are very concerned with the risks inherent in sharing their personal information.

GOVERNMENT CUSTOMERS

64% want their interactions with service providers to be personalized

42% are comfortable with organizations using data from their website interactions

53% are concerned with the privacy of their personal information

33% trust service providers to use their data responsibly

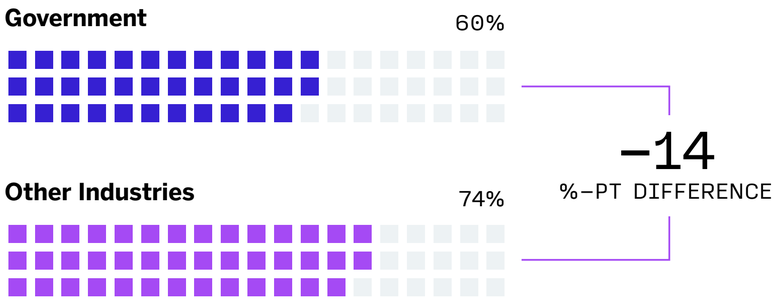
And just one-third of customers actually trust service providers to use their data responsibly. Data breaches and inappropriate use of customers' personal data are putting pressure on governments to put better safeguards in place, even as they drive toward innovations for more personalized experiences.

ADAPTING AND DELIVERING THROUGH CHANGE

Like their customers, government employees are embracing change. The most engaged government employees are those who are encouraged to develop new ways of serving their customers. And the top predictor of government employee wellbeing is feeling their organization continuously improves how work gets done. But these operational developments are not matched with adequate support to successfully navigate change in their workplaces. Government employees rate change management support from their organizations 14 percentage points lower than the all industry average, despite this support being the strongest predictor of having their workplace expectations met.

Elsewhere, Qualtrics XM scientists have analyzed the drivers of engagement in the midst of disruption. We found that employee wellbeing is the key performance indicator organizations should focus on to keep employees engaged through unexpected or major disruptions. Yet government employees are 14 percentage points less likely to feel a sense of wellbeing in their work lives than their peers across other industries.

EMPLOYEES FEEL SUPPORTED AS THEY ADAPT TO CHANGE



STRATEGIC ADVICE

BUILD THE CAPABILITIES FOR RESILIENCE NEEDED IN AN AGE OF DISRUPTION

Governments are at the center of the world's most disruptive events—both human and nature inflicted—and must directly respond to emergencies while keeping routine operations stable. Resilience is a core responsibility of government—to help customers through the unexpected, and to support employees through change. This means putting safeguards and risk management tools in place to protect information and operations from external threats, while providing transparency, which is critical for public accountability. Government leaders must understand that *employee wellbeing* is an essential component of resilience, and provide the right environments for the workforce to manage change effectively.

> "Government leaders must understand that employee wellbeing is an essential component of resilience, and provide the right environments for the workforce to manage change effectively. "

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03

TREND 3

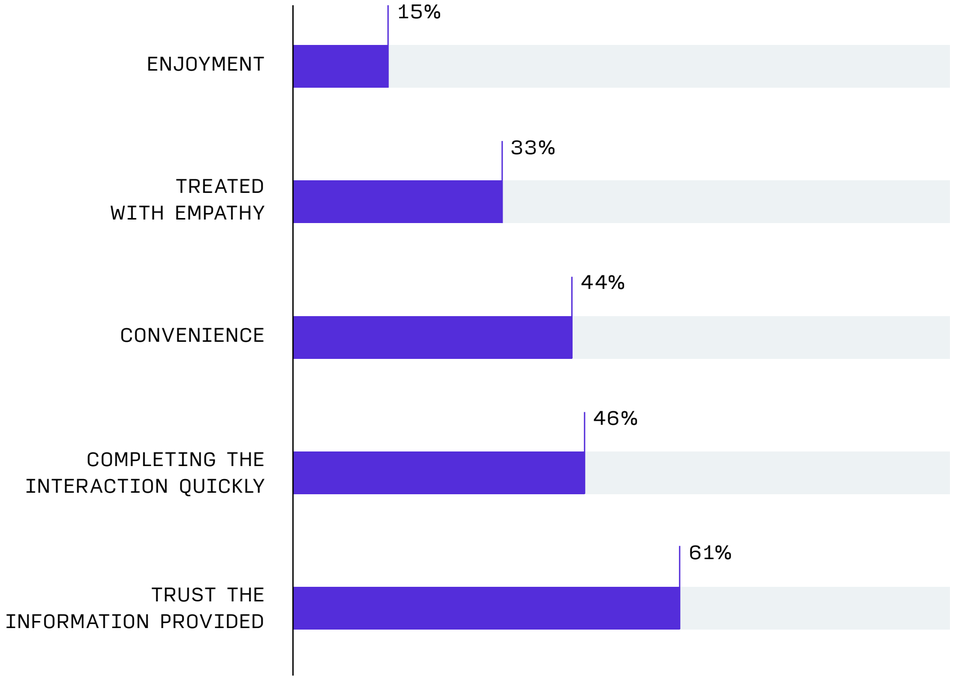
Productivity is our common goal

Customers often do not have a choice as to whether to interact with the government—they're required to. As a result, government customers want to complete these mandatory interactions quickly, efficiently and safely. Top priorities for customers when interacting with the government are:

Trust: They need to be able to rely on the information provided in the interaction.

Time: Completing the interaction quickly and efficiently.

TOP PRIORITIES FOR CUSTOMERS GLOBALLY ARE:

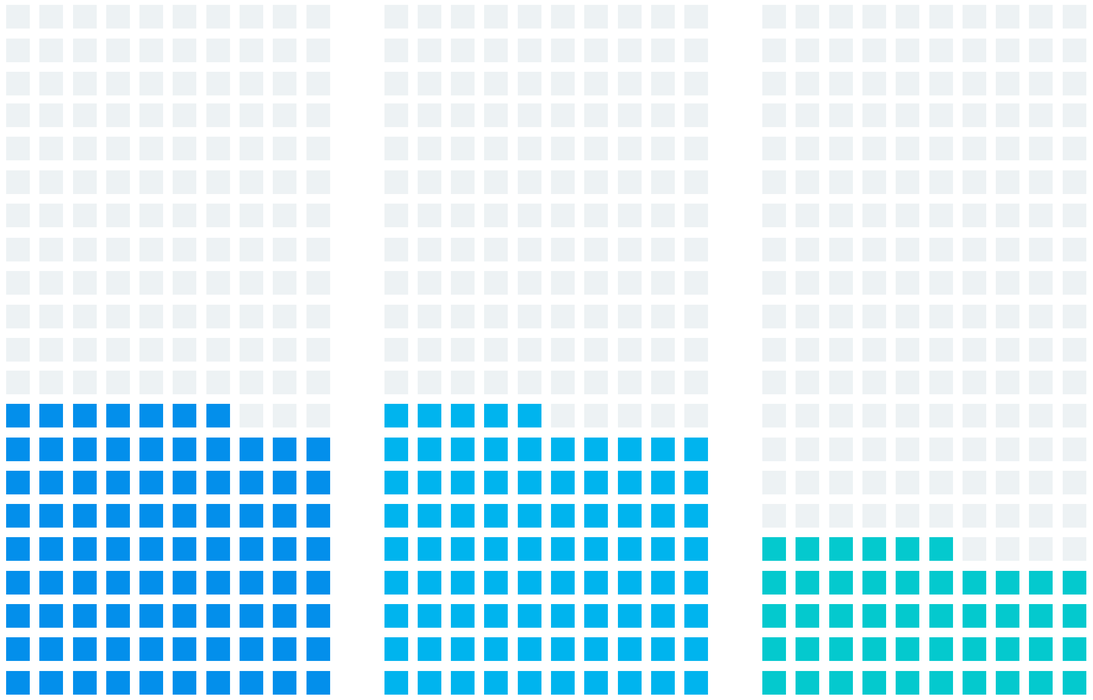


03

As customer willingness to share feedback continues to decline, and conflicting sources of information about government services become more difficult to manage, providing effective customer service is becoming increasingly complex.

The time-and-money squeeze is affecting government employees as well, with nearly one-third reporting that they feel pressure to increase productivity. This data shows that the strategic and fast paced changes are the source of this pressure. This research found that this pressure alone, without the support to meet new demands, has a negative impact on employee wellbeing and engagement—ultimately reducing the workforce capacity to be productive!

SOURCE OF PRODUCTIVITY PRESSURE FOR GOVERNMENT EMPLOYEES



37% INCREASING PACE OF CHANGE

36% STRATEGIC CHANGES

26% EXTERNAL ECONOMIC CONDITIONS

29%

OF GOVERNMENT EMPLOYEES REPORT FEELING PRESSURE FROM EMPLOYER TO INCREASE PRODUCTIVITY

03

STRATEGIC ADVICE

MAKE IT EASIER FOR PEOPLE TO SHARE THEIR EXPERIENCES

Government leaders can't hope to drive improvement in service delivery without getting customers and frontline employees to participate—or finding *alternative paths to gather feedback data*. Acting on feedback is the first imperative—customers and employees alike will stop responding to surveys if they don't believe their voice matters. Alternative channels for feedback are now emerging that could ease the pressure on customers and employees to respond to structured surveys. New approaches to synthetic data may offer hope, enabling governments to leverage the rich insights generated by AI from existing data sets.

Today's groundwork and innovations in AI will lead to a future where technology enables people to interact with government agencies and achieve their goals more effectively—relieving pressure on services and freeing up employees to focus on the things that matter most: Deliver the truly human service experiences that everybody craves.

> "Acting on feedback is the first imperative—customers and employees alike will stop responding to surveys if they don't believe their voice matters."

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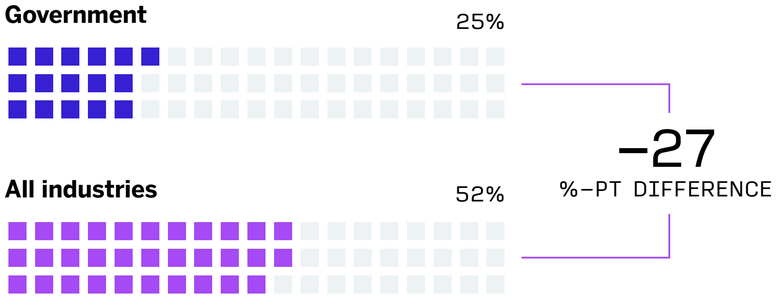
AI SPOTLIGHT

Let's not forget AI... and how governments are slower to adopt it

Despite the promise of AI to increase efficiency and free government employees from mundane tasks, governments around the world are lagging behind other industries in adopting AI tools. More than half of government employees globally say they never use AI tools at work. Of those who do, a third say they source these tools themselves and only 25% of government employees say they are enabled to use them. This poses a potential security risk for government systems. This is particularly concerning when less than one third of government employees report being enabled on AI principles, guidance and ethics—compared to 52% of employees from all other industries.

This lack of enablement, access and support to use AI tools at work is a significant obstacle for productivity improvements, and likely the root cause of government employees being more concerned than the general population about the potential impact of AI on the nature of their jobs.

EMPLOYEES WHO HAVE RECEIVED AI TRAINING THROUGH WORK



Yet, government employees perceive AI as an important productivity booster. Like their counterparts across industries, government employees see AI adoption as an enabler to efficiency (42% would complete their work in less time) and effectiveness (43% would increase the quality of services for customers).

Customers agree. Nearly half of customers believe AI will make their interactions with service providers easier. And our data shows a positive relationship between use of AI and trust in organizations to use AI responsibly. The more people understand how AI works—and how helpful it can be—the more adoption and trust is generated.

HOW GOVERNMENT EMPLOYEES WOULD USE TIME SAVED BY AI

43%

Increase the quality of their work

42%

Would complete their work in less time

STRATEGIC ADVICE

GOVERNMENT A(I)GENCIES MOVING FAST

Governments looking to improve the ease and success of customers' interactions must step up the pace of AI adoption in order to keep up with other industries—which sets customers' expectations for positive experiences. This starts with their own employees, providing the enablement and tools the workforce needs to significantly improve productivity. Governments also play a unique role in driving business innovation—fostering responsible AI adoption across the general population may pave the way for better outcomes for government stakeholders as customers and as contributors to economic competitiveness.

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What's next for experience management in government

The future of experience management in government leans heavily on the pillars of productivity, resilience, and trust, as highlighted in our findings. To navigate these challenges effectively, government entities must prioritize a genuine understanding of both customer and employee experiences, leveraging innovative tools for continuous feedback. This approach enhances service delivery and strengthens the workforce's capability to cope with change.

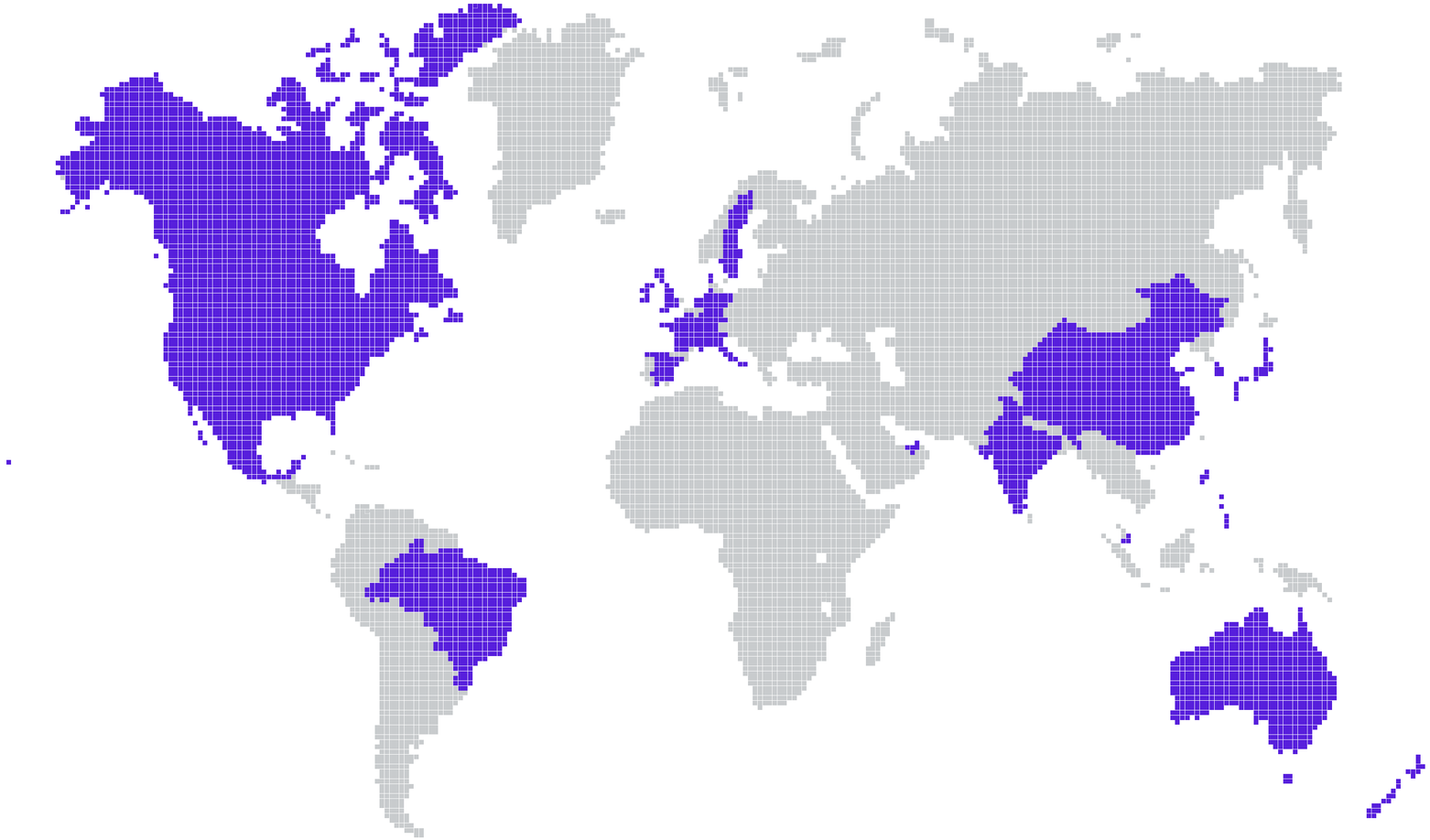
DEMO
GET STARTED
WITH QUALTRICS

By fostering a culture of listening and proactive engagement, government agencies can bridge the experience gap, boost trust, and drive better outcomes for the communities they serve. This path forward requires a commitment to adopting intelligent solutions that promote experience management, ensuring resilience and building trust within the government landscape. Ultimately, by collecting insights and embracing collaboration, governments will be better equipped to meet the evolving needs of their customers and effectively advance their missions.

Methodology

This report draws from Qualtrics' 2025 Global studies of *Customer* and *Employee* Experience, to provide a view of customers reporting their interactions with government organizations, and employees' experiences working for a government agency. We analyze how governments are performing against key performance indicators for Customer and Employee Experience and how they compare to other industries. Details about the study methodology can be found in the 2025 Global reports on Customer and Employee Experience.

To enable comparisons across governments, while preserving adequate sample sizes for analysis, we clustered countries with shared geography, similar systems of government, and strong economic ties.



Government sample

Consumer Trends Research: 23,730 respondents across 23 Countries/Regions

SAMPLE	GOVERNMENT CUSTOMER RESPONSES
Global	4,738
Australia & Aotearoa New Zealand	541
USA	182
Singapore & South Korea	526
Ireland & UK	417
EU (Italy, Denmark, Netherlands, Spain and Sweden)	1,129

Employee Experience Trends Research: 35,023 respondents across 22 Countries/Regions

SAMPLE	GOVERNMENT EMPLOYEE RESPONSES
Global	2,021
Australia & Aotearoa New Zealand	268
USA	159
Singapore, South Korea and Japan	224
Ireland & UK	212
EU (France, Italy, Germany, Denmark, Netherlands, Spain and Sweden)	726

Definitions

Engagement: Employees possess the physical, emotional, and psychological resources necessary to invest fully in their roles. Employers care about Engagement because it predicts future organizational performance. The more engaged an individual, the higher their discretionary effort. Engagement is persistent; it takes more than one bad or good day to change how engaged someone is in their work. Rather, it is driven by the cumulative effect of day-to-day Employee Experiences.

Recommend: Likelihood to recommend the organization as a place to work.

Personal Accomplishment: The employee's connection to their job and work; their sense of purpose.

Motivation: Willingness to go above and beyond.

Expectations Exceeded: Employees believe their organization is living up to their expectations about their experience. This item is distinct from Engagement and can be thought of as a broader measure that encapsulates elements of the psychological contract. It also acknowledges that expectations shift as people navigate different points in their employee journey, the distinct changes in needs and desires through the phases of life, and evolving norms in the world around them.

Intent to Stay 3 or more years: This KPI is a measure of overall organizational commitment, and has been empirically linked to actual turnover. Because replacing employees is costly for organizations, intent to stay is an important predictive measure of workforce churn.

Inclusion: Organizations create a sense of inclusion when they see diverse identities as a source of insight, and offer employees opportunities to leverage their unique skills and attributes. Qualtrics' measure of inclusion is made up of three components:

Equity means equal outcomes for different groups of employees in the workplace. Equitable workplaces make adjustments to ensure that all employees have fair and equal access to opportunity.

Belonging is a key and distinct psychological construct. Employees who have a positive connection with their workplace and colleagues are more engaged, productive and resilient.

Authenticity is feeling like you can be yourself. Being integrated into an organization without feeling that you be yourself creates discomfort, and demands cognitive energy from employees who are required to adapt or assimilate.

Wellbeing: Individuals have what they need to ensure positive working habits. Drawing from the latest research, Qualtrics measure of well-being has three components:

Trusting Relationships: Social connections and meaningful relationships at work enable employees to successfully navigate challenges they face.

Self-Positivity: A good baseline level of self-esteem or self-confidence is important to overall employee well-being . When we feel positive about ourselves we tend to feel better about life in general.

Energized: Employees who have high levels of well-being feel energized at work. This can also be a good indicator of potential burnout.

Government Customer Experience: Government organizations seeking to achieve positive results for their customers focus on two top-level KPIs: Satisfaction and Trust. While commercial organizations also look at customers' likelihood to recommend the service, and willingness to purchase again, these are not relevant for government interactions which are often mandatory.

Satisfaction: Customers are satisfied when interactions with a government service are easy and they successfully achieve their goals. The emotional experience customers have with the interaction is consistently lower for governments than for other industries—when customers are unsatisfied, or cannot achieve their goals, the cost to serve them only increases and this creates an exponential drain on the organization's resources as they fix broken experiences.

Trust: Trust is an important indicator of customers' experiences with Government organizations. If customers do not trust their government, they are less likely to adopt public policies designed to protect and promote their welfare. Their distrust could also cause disruption that jeopardizes the government's ability to sustain operations.

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Empower everyone in your organization to deliver exceptional service experiences, build high-impact teams, and drive informed decision-making with AI-powered Qualtrics Experience Management (XM).

XM FOR
Customer Experience

XM FOR
Employee Experience

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Strategy & Research