Results of the Q2 2008 American E-Government Satisfaction Index

Errol Hau
Senior Director of Government Markets
ForeSee Results
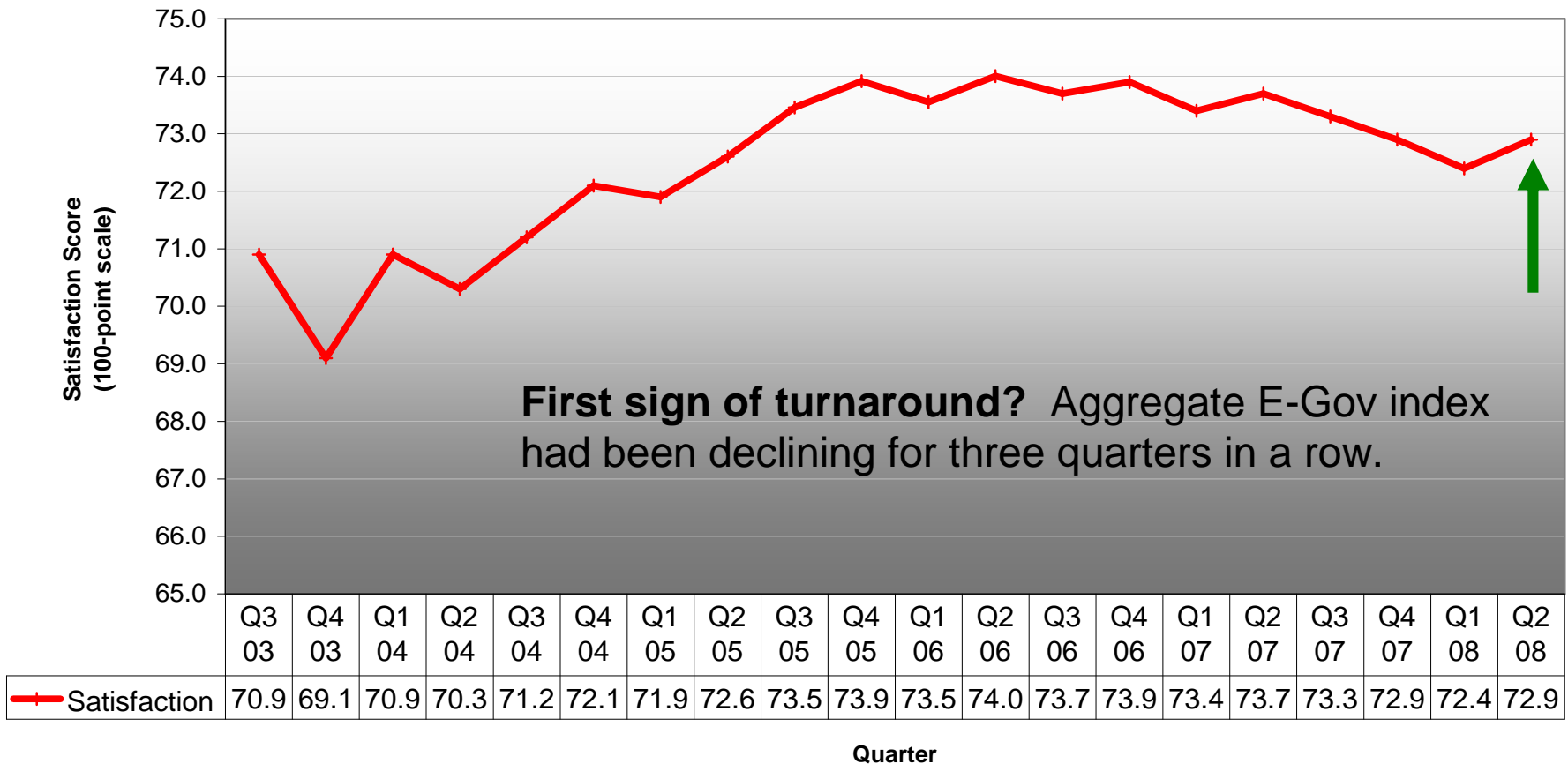**July 29, 2008**

The Big Picture

Summary of Findings

- **Aggregate satisfaction: 72.9**
  - Up 0.7% (0.5 points) quarter-over-quarter
  - Down 0.8 points year-over-year

- **Last year's declining trend appears to have been curtailed:**
  - First score increase reported since Q2 2007 (73.7)
  - Only 1.1 points below all-time high score of 74 (Q2 2006)

- **108 sites measured in Q2 2008**

- **23 sites are "top performers"**
  - 21% of total are "top performers," up from 16% last quarter
  - Scores of 80 or higher

- **Two functional categories experienced score increases**
  - Portals/Main Sites up 2.5% since last quarter (rebound from decline previous quarter)
  - E-commerce/Transactional up 1.7% since last quarter

ACSI E-Gov Index Quarterly Trend Line
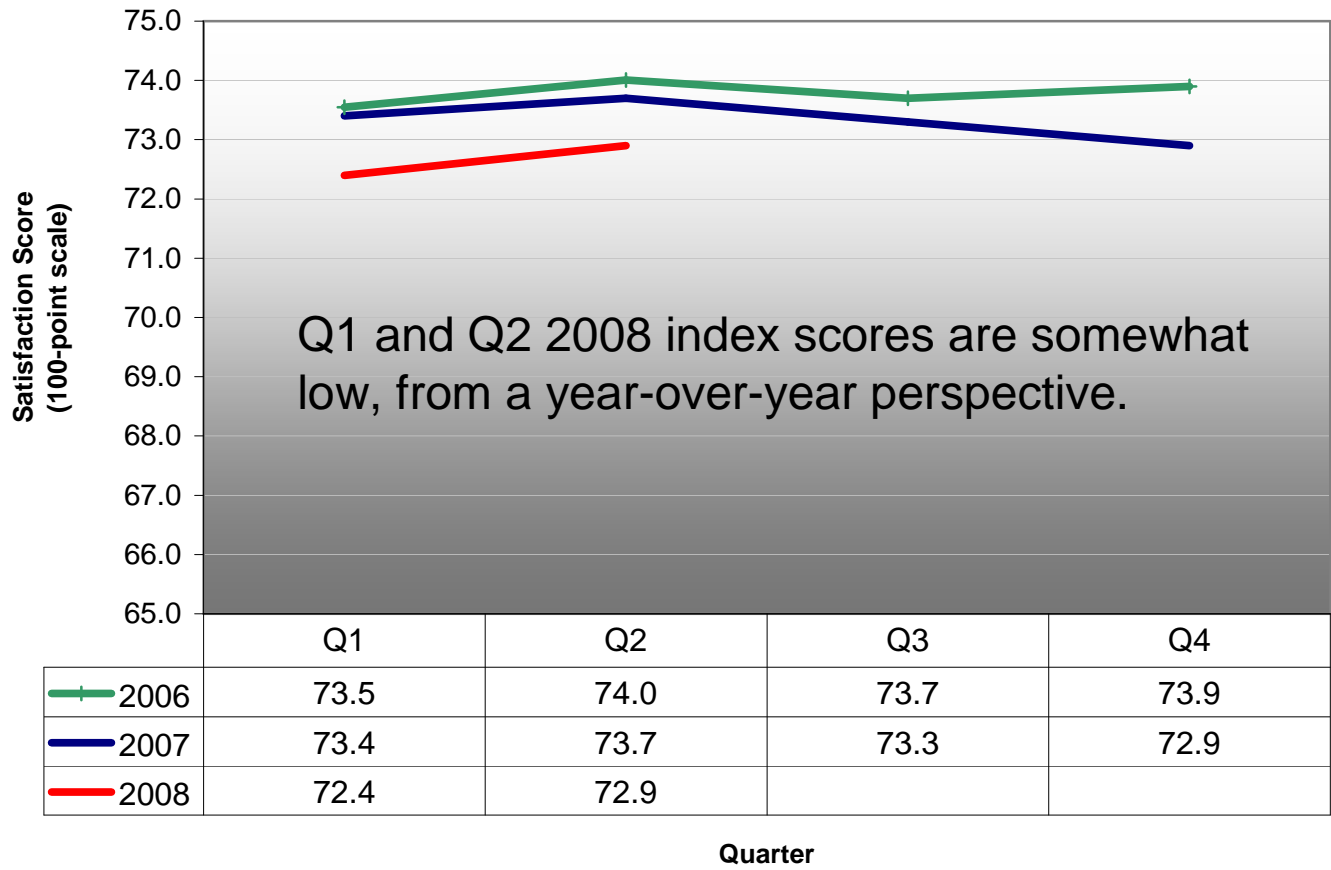2003-2008

First sign of turnaround? Aggregate E-Gov index had been declining for three quarters in a row.

	Q3 03	Q4 03	Q1 04	Q2 04	Q3 04	Q4 04	Q1 05	Q2 05	Q3 05	Q4 05	Q1 06	Q2 06	Q3 06	Q4 06	Q1 07	Q2 07	Q3 07	Q4 07	Q1 08	Q2 08
Satisfaction	70.9	69.1	70.9	70.3	71.2	72.1	71.9	72.6	73.5	73.9	73.5	74.0	73.7	73.9	73.4	73.7	73.3	72.9	72.4	72.9

Quarter

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FORESEE RESULTS

ACSI E-Gov Index Quarterly Trend Lines
Year-Over-Year, 2006-2008

Q1 and Q2 2008 index scores are somewhat low, from a year-over-year perspective.

Satisfaction Score (100-point scale)

	Q1	Q2	Q3	Q4
2006	73.5	74.0	73.7	73.9
2007	73.4	73.7	73.3	72.9
2008	72.4	72.9		

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E-Gov Satisfaction Index
Key Comparisons

Citizens continue to be more satisfied with E-Gov than with Federal government as a whole.

E-Government Q2 2008	**72.9**

•*Real-time data collection from >100 federal websites*
•*About 238,000 responses; sample size is **higher** because most component scores are now based on a full quarter of data, rather than previous sample-based approach*

Annual ACSI Aggregate Federal Government Score	**67.8**

• *Experience with any Federal agency over the past year*
• *1,374 responses collected (CI +/- 1.1)*

+ 5.1 gap

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90% level of confidence, est. std dev 20

E-Gov Still Trails Private Sector

Not surprisingly, the gap between E-Gov and key ACSI E-Business satisfaction indices has continued.

E-Government Q2 2008	**72.9**

E-Business Q2 2007 *(news/information, search engines, portals)*	**75.2**
E-Commerce Q4 2007 *(online retail, travel, auction, brokerage)*	**81.6**

Is E-Gov Satisfaction on the Upswing?

- **The E-Gov Index quarter-over-quarter score increase may indicate a real positive change.**
  - The overall ACSI Index showed an upturn in Q1 2008. Although these indices do not always trend together, could the increases be related?
  - Are government and private sector sites making similar improvement efforts?

- **Now that the "bleeding" may have stopped, what's next?**
  - Despite recent declines, E-Gov only trails its best-ever index score by 1.1 points
  - A large number of sites have managed to make site improvements that have made a real difference in citizen satisfaction
  - Utilizing findings about your site's Top Priorities is key

Number of Sites in Satisfaction Score Range

	80s	70s	60s	<60
Q2 2008	*23*	*55*	*25*	*5*
Q1 2008	17	53	33	2
Q4 2007	20	54	24	5
Q3 2007	19	49	19	4
Q2 2007	15	49	17	2
Q1 2007	16	45	15	4
Q4 2006	18	50	18	1
Q3 2006	18	52	22	3

Percent of Sites in Satisfaction Score Range

	80s	70s	60s	<60
Q2 2008	*21%*	*51%*	*23%*	*5%*
Q1 2008	16%	50%	31%	2%
Q4 2007	19%	52%	23%	5%
Q3 2007	21%	54%	21%	4%
Q2 2007	18%	59%	20%	2%
Q1 2007	20%	56%	19%	5%
Q4 2006	21%	57%	21%	1%
Q3 2006	19%	55%	23%	3%

Comparison of Q2 2008 to Q1 2008:

% of sites with **higher** scores	% of sites with **lower** scores	% of sites with **same** score
45%	30%	24%

Comparison of Q2 2008 to Q2 2007:

% of sites with **higher** scores	% of sites with **lower** scores	% of sites with **same** score
44%	32%	24%

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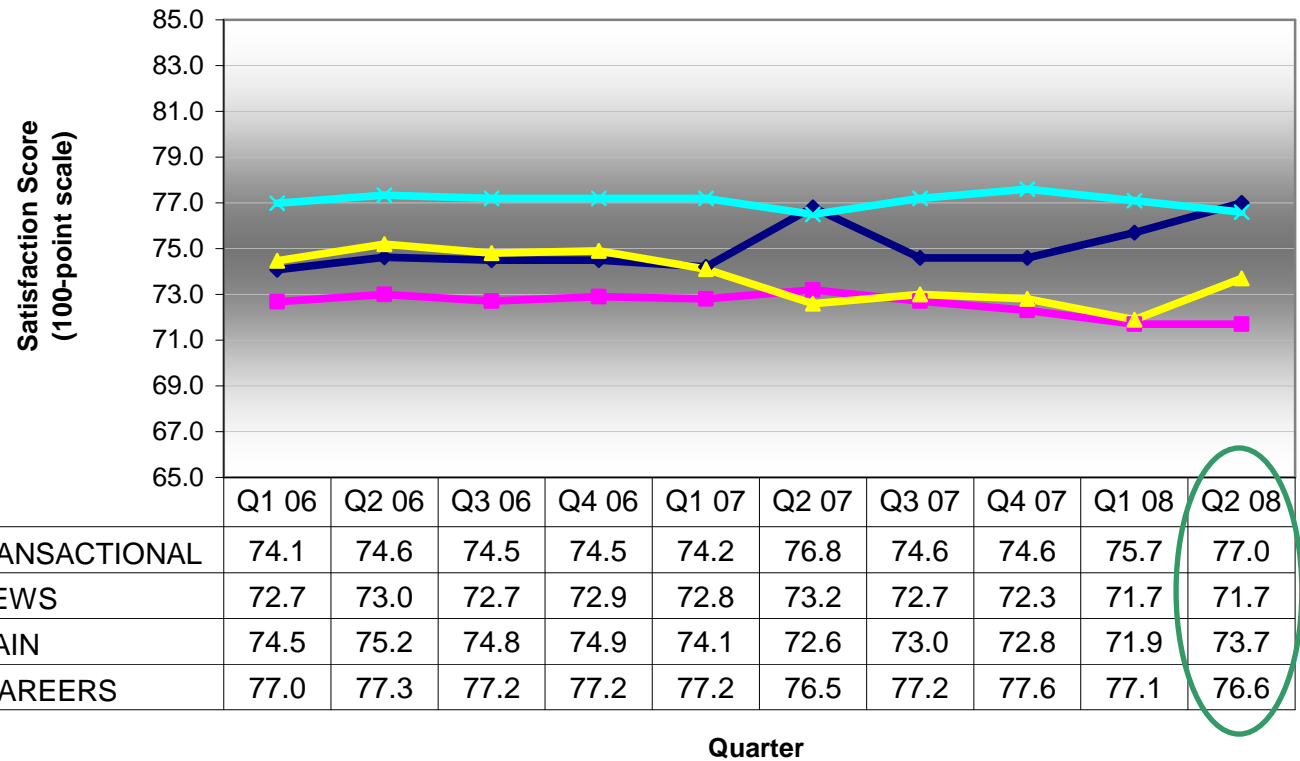# Functional Category Satisfaction Trends

Typically Highest-Scoring:

Recruitment/Careers Sites

Typically Lowest-Scoring:

Information/News Sites

ACSI E-Gov Index Quarterly Trend Lines by Functional Category, 2006-2008

Satisfaction Score (100-point scale)

	Q1 06	Q2 06	Q3 06	Q4 06	Q1 07	Q2 07	Q3 07	Q4 07	Q1 08	Q2 08
ECOMMERCE/TRANSACTIONAL	74.1	74.6	74.5	74.5	74.2	76.8	74.6	74.6	75.7	77.0
INFORMATION/NEWS	72.7	73.0	72.7	72.9	72.8	73.2	72.7	72.3	71.7	71.7
PORTAL/DEPT MAIN	74.5	75.2	74.8	74.9	74.1	72.6	73.0	72.8	71.9	73.7
RECRUITMENT/CAREERS	77.0	77.3	77.2	77.2	77.2	76.5	77.2	77.6	77.1	76.6

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Recent Functional Category Trends:

E-Commerce/Transactional: Upward (2 quarters)

Portals/Main Sites: Upward

Information/News: Slight Downward/Flat

Recruitment/Careers: Slight Downward

Functional Categories:
Quarter-Over-Quarter

Citizen satisfaction increased for the Portals/Main Sites and E-Commerce/Transaction categories.

	Q1 2008	Q2 2008	% Change
ACSI E-Gov Aggregate	72.4	72.9	+0.7%
E-Commerce/Transactions	75.7	77.0	+1.7%
Information/News	71.7	71.7	--
Portals/Main Sites	71.9	73.7	+2.5%
Recruitment/Careers	77.1	76.6	-0.6%

Satisfaction has decreased for Information/News Sites compared to 2Q 2007, while Portals/Main Sites have gained ground.

	Q2 2007	Q2 2008	% Change
ACSI E-Gov Aggregate	73.7	72.9	-1.1%
E-Commerce/Transactions	76.8	77.0	+0.2%
Information/News	73.2	71.7	-2.0%
Portals/Main Sites	72.6	73.7	+1.5%
Recruitment/Careers	76.5	76.6	+0.1%

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Organizational Category Satisfaction Trends

Typically Highest-Scoring:

Program Sites

Typically Lowest-Scoring:

Department Sites

ACSI E-Gov Index Quarterly Trend Lines by Organizational Category, 2006-2008

	Q3 06	Q4 06	Q1 07	Q2 07	Q3 07	Q4 07	Q1 08	Q2 08
DEPARTMENT	72.0	71.9	70.7	69.9	70.8	71.6	70.8	72.2
AGENCY	71.1	72.6	73.0	73.4	73.4	73.1	72.2	72.3
PROGRAM	75.2	78.9	77.2	77.1	74.5	73.4	73.6	73.6
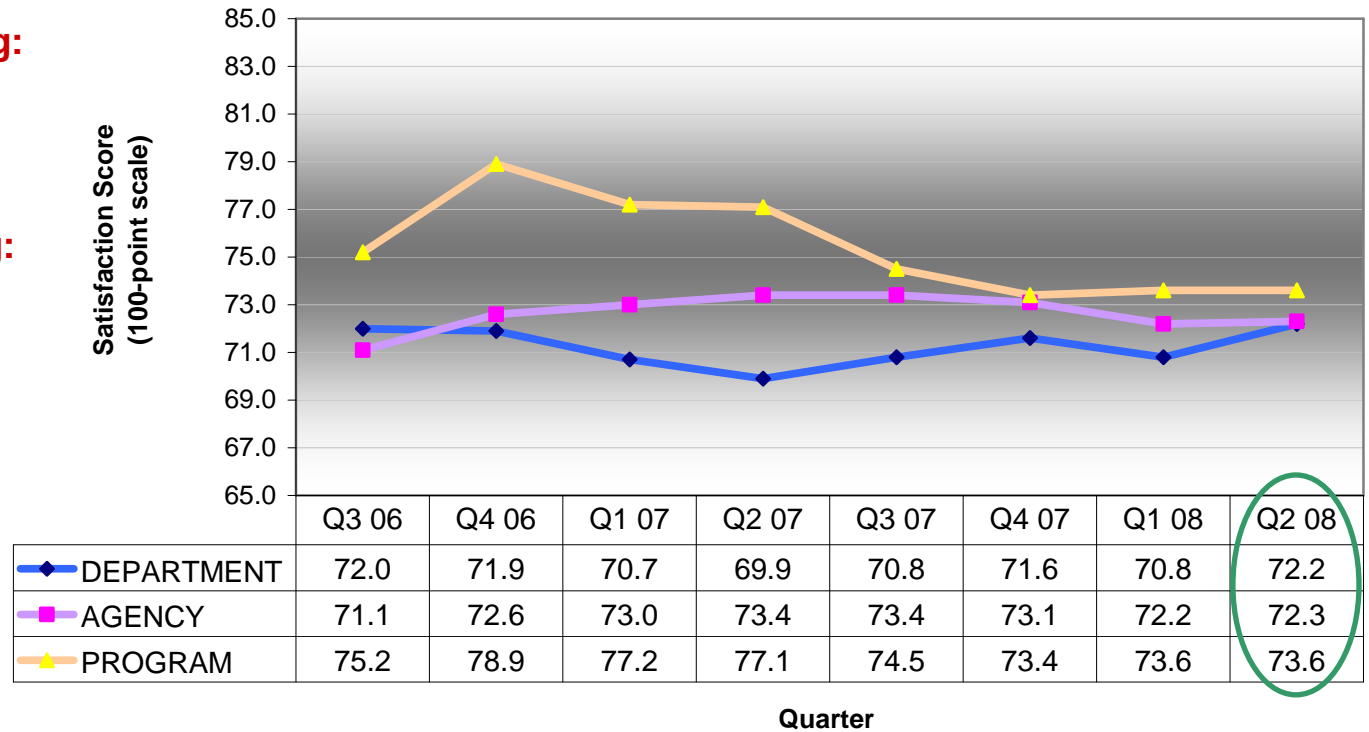
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Recent Organizational Category Trends:

Department: Upward   **Agency:** Flat   **Program:** Flat

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Future Behavior Trends and Comparisons

RESULTS

The future behavior indices were on par with the previous quarter.

|	Q1 2008	Q2 2008	% Change
Satisfaction	72.4	72.9	+0.7%
Return	82	82	--
Recommend	78	78	--
Primary Resource	75	75	--

Trend: Satisfaction and Future Behaviors

Site visitors highly likely to return to E-Gov sites, Recommend them, and use as primary resource

Future behaviors have been relatively stable for some time at the overall index level

Satisfaction and Future Behavior Trend Lines
2006-2008
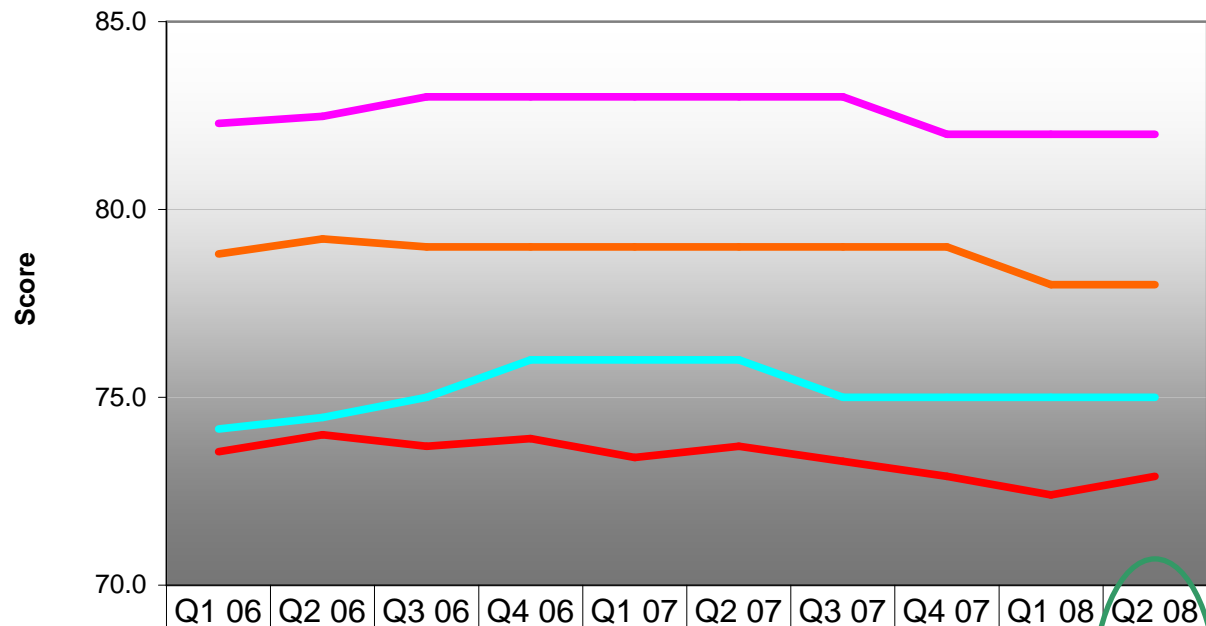
	Q1 06	Q2 06	Q3 06	Q4 06	Q1 07	Q2 07	Q3 07	Q4 07	Q1 08	Q2 08
Satisfaction	73.5	74.0	73.7	73.9	73.4	73.7	73.3	72.9	72.4	72.9
Return	82	82	83	83	83	83	83	82	82	82
Recommend	79	79	79	79	79	79	79	79	78	78
Primary Resource	74	74	75	76	76	76	75	75	75	75

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Comparing three key E-Gov functional categories, E-Commerce/ Transactional sites currently garner the greatest satisfaction and, as a result, site visitors are more likely to return and recommend them.

Q2 2008	Q2 2008	E-Commerce/ Transactional	Information/ News	Portal/Main Site
Satisfaction	72.9	77.0	71.7	73.7
Return	82	87	80	83
Recommend	78	82	77	80
Primary Resource	75	--	74	76

Element Trends and Comparisons

The element indices were mainly on par with the previous quarter.

	Q1 2008	Q2 2008	% Change
Content	79	79	--
Functionality	76	76	--
Look & Feel	77	77	--
Navigation	73	73	--
Search	73	74	+1.3%
Site Performance	82	82	--
Tasks/Transactions	79	80	+1.3%

Element Analysis

Which elements are Top Priorities for improvement?

% of sites with element as first or second priority

	Q1 2008 Top Priority	Q2 2008 Top Priority
Tasks/Transactions *	69%*	92%* ⬆
Search	83%	88%
Functionality	47%	59% ⬆
Navigation	51%	41% ⬇
Look & Feel	30%	31%
Site Performance	15%	12%
Content	4%	6%

* Among only 13 sites measuring this element

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Q2 2008 Top Priority Elements by Category

Top Priorities remain consistent for functional E-Gov site categories.

E-commerce/Transactional
- Tasks/Transactions   100%
- Search   50%

Information/News
- Search   93%
- Functionality   59%

Portal/Dept. Main Site
- Search   88%
- Functionality   69%

Recruitment/Careers
- Navigation   75%
- Job Search   75%

Sites and Citizens

Scores by Department

Department	Q2 2008
Department of Health and Human Services	79.0
Social Security Administration	78.4
Department of the Treasury	72.3
Veterans Administration	72.1
General Services Administration	71.0
Department of State	70.2
Department of Agriculture	66.4

Top Performers

23 sites (21%) have scores of 80+

Website	Q2 2008 Satisfaction
Help with Medicare Prescription Drug Plan Costs -- http://www.socialsecurity.gov/i1020/	88
America Supports You -- http://www.americasupportsyou.mil	87
Internet Social Security Benefits Application --http://www.socialsecurity.gov/applyforbenefits	87
MedlinePlus -- http://medlineplus.gov	85
NIDDK - http://www2.niddk.nih.gov/	85
MedlinePlus en español -- http://medlineplus.gov/esp/	84
President's DNA Initiative -- http://www.dna.gov	84
AIDSinfo -- http://aidsinfo.nih.gov/	84
Social Security Business Services Online --http://www.ssa.gov/bso/bsowelcome.htm	84
MyPBA - https://egov.pbgc.gov/mypba	83
NIAMS Public Website --http://www.niams.nih.gov/index.htm	82
National Women's Health Information Center (NWHIC) main website -- www.4woman.gov	82

Top Performers (Cont'd)

Website	Q2 2008 Satisfaction
National Cancer Institute Site en Español-- www.cancer.gov/espanolwww.cancer.gov/espanol	82
Online Catalog -- http://catalog.usmint.gov	82
MyPAA - https://egov.pbgc.gov/mypaa	82
Federal Citizen Information Center -- www.pueblo.gsa.gov/	82
OSE main website - http://science-education.nih.gov/	81
CDC main website -- www.cdc.gov	81
National Cancer Institute main website -- www.cancer.gov	80
Recruitment website -- http://www.cia.gov/employment	80
GobiernoUSA.gov website -- www.gobiernousa.gov	80
FBI main website -- www.fbi.gov	80
NASA main website -- www.nasa.gov	80

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Why Strong Satisfaction is Important

Satisfaction leads to desired future behaviors

	Top Performers (80 and above)	Bottom Performers (70 and below)	% Difference
Satisfaction	**82.7**	**64.0**	**29.2%**
Return	**88.7**	**74.9**	**18.4%**
Recommend	**85.9**	**70.3**	**22.2%**
Primary Resource	**82.4**	**68.4**	**20.5%**

Highly-satisfied citizens (individual site visitors scoring E-Gov sites 80 or higher) are significantly more likely than dissatisfied citizens (scoring less than 70) to use a government website as a primary resource, recommend it to others, or return to the site.

A satisfied site visitor is:

- **84%** more likely to use the site as a primary resource
- **83%** more likely to recommend the site to others
- **57%** more likely to return to the site

Q & A

For More Information…

- **Errol Hau**
  - Errol.Hau@ForeSeeResults.com
  - (734) 205-2552

- **Howard Merkel**
  - Howard.Merkel@ForeSeeResults.com
  - (734) 205-2555

- **Bernie Lubran**
  - Bernie.Lubran@ForeSeeResults.com
  - (240)994-0240