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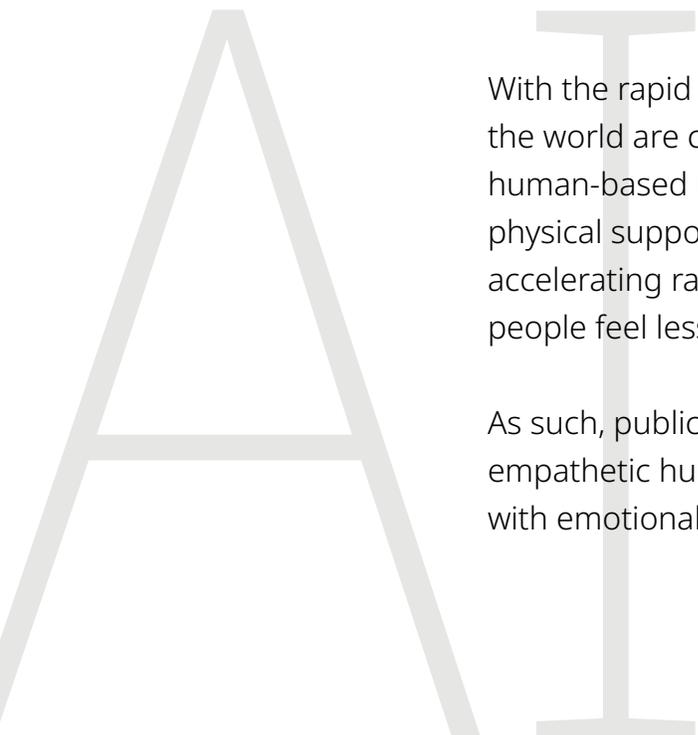


GOVERNMENT TRENDZ TO WATCH IN 2025 & BEYOND: Personalized, Human-Centric Citizen Services in the Age of AI



A TrendzOwl
Executive Brief
in Partnership with





With the rapid pace of technological change, citizens all over the world are concerned about the potential loss of empathetic, human-based interactions in their daily lives. As traditional physical support networks migrate to the virtual world at an accelerating rate, 32% of citizens think technology will make people feel less connected to their communities.¹

As such, public sector leaders must prioritize the deployment of empathetic human support by blending artificial intelligence (AI) with emotional intelligence (EI).

TrendzOwl has identified three interconnected & sequential themes related to citizen support for 2025 and beyond:

ADVANCING CAPABILITIES

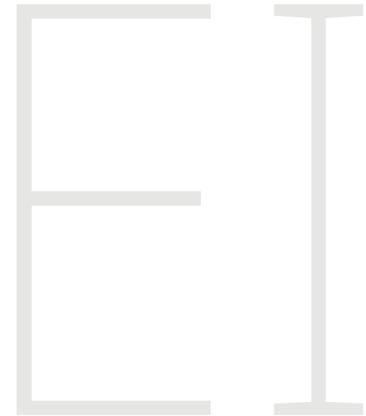
While the public sector has accelerated the shift toward the digitization of many public services, it needs to continue improving the provision of high-quality, end-to-end experiences that meet heightened citizen expectations.

STRENGTHENING TRUST AND ENGAGEMENT

Recent research shows that satisfaction with government services and support interactions leads to higher levels of trust in government and, in turn, more civic engagement.

EMPATHETIC, HUMAN SUPPORT IS CRITICALLY IMPORTANT

Leading Business Process Service providers are driving outcomes for public sector entities by fostering human-centric support at scale. As such, the human element is central to the effective provision of government services worldwide.



TRENDZ SPOTLIGHT

Digitalization

All across the world, citizens see increasing technology adoption as instrumental in improving their lives. According to EY (previously Ernst & Young), globally, almost one-third of citizens (32%) rank increased use of digital technologies in the provision of public services as one of the top three priorities for governments to improve the quality of services.² McKinsey agrees, asserting that, “While all channels (or ways of engaging) need to work, our survey participants overwhelmingly want easy and comprehensive digital solutions.”³

Prioritizing Privacy & Security

At the same time, it’s no surprise that, as EY notes, personal privacy and digital security are growing concerns across the world: “As more people and devices are connected, the volume and variety of data created, and the speed at which it is gathered, will increase. This is creating public anxiety around personal privacy and lack of control over how people’s data is used. More than 4 in 10 citizens are against the sharing of data, both within government and with private sector companies.”⁴

HUMAN-DRIVEN SUPPORT

The Need for Human Empathy

Above all, when it comes to improving citizen support, research from Qualtrics is clear—“Looking at variables in isolation, we find that 56% of satisfaction can be attributed to customer experiences such as empathy, meeting needs, responsiveness, relevance, fairness, level of effort, etc. How customers evaluate these drivers of experience has a powerful influence on satisfaction with—and therefore trust in—government and the services it provides.”⁵ In fact, “It turns out that the influence of politics, regional disparities, journey ‘moments,’ or channels (e.g., phone, digital, in person) is minimal compared to experiential factors.... In other words, people care about how they feel more than any other factor we tested.”⁶

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--Qualtrics

\$1.75

trillion

estimated productivity value expected in government services from generative AI per year by 2033.

--BCG Research

In pursuit of this mission, technology will play an important role augmenting human talent. By embedding it with human agents, “Generative AI provides an unprecedented opportunity for governments around the world to deliver public services with greater efficiency and impact. The potential value is remarkable: BCG research suggests that the market for GenAI applications for the public sector will grow at more than 50% per year, with an estimated productivity value of \$1.75 trillion per year by 2033 across all national, state or provincial, and local governments.”⁷ Gartner agrees. “Heightened citizen demand for government services,” says the research firm, “... means more AI in government—much more. Government is on track to spend more on AI than any other industry by 2025, notching an estimated 19% CAGR in AI investment between 2022 and 2027.”⁸

Even so, human beings will be the most significant part of the mix. As TP’s 2024 Global Insights Survey points out—“How do consumers feel about brands using Generative AI tools for support? The main consensus among consumers is that Gen AI tools need human oversight. Although there is much agreement on the benefits of Gen AI for simple issues, most consumers disagree that Gen AI can provide the same level of support as a human and they largely prefer human interaction most of the time or always, supporting a good case for AI-enabled human interaction.”⁹

TRENDZ AROUND THE WORLD

The United States: In the Midst of Transformation

In the United States, enhancing efficiency and improving services are stated aims of new AI-specific policies released by the White House.¹⁰ Agencies are being encouraged to harness solutions that bring the best value to taxpayers while increasing the quality of public services.¹¹ “GSAi,” a custom generative AI chatbot for the US General Services Administration, is being rapidly integrated into governmental operations.¹² And while the new chatbot and other AI tools will aim to analyze huge swaths of contract and procurement data, the process of technological modernization must also prioritize cybersecurity, with the U.S. government introducing additional measures into its National Cybersecurity Strategy.



At the same time, in a massive market where health and human services differ across fifty states, the District of Columbia, and U.S. territories, it's instructive to consider the consensus opinion of state CIOs. The National Association of State Chief Information Officers (NASCIO), an association that represents state CIOs and technology leaders across the United States, recently released its “State CIO Top 10 Priorities for 2025,” highlighting the key policy and technology initiatives that will shape state-level technology strategies in the coming years.¹³

At the forefront of these priorities is “Cybersecurity and Risk Management,” which has maintained its position as the top priority for the twelfth consecutive year. This underscores the ongoing need for robust security measures to safeguard government systems against growing and evolving digital threats. Close behind, “AI, Machine Learning, and Robotic Process Automation” have moved up to the second position, reflecting the increasing adoption of these technologies to streamline government operations, enhance decision-making, and automate routine tasks. Lastly, “Digital Government and Digital Services” rank third, emphasizing the importance of creating user-friendly, accessible digital platforms that improve citizen engagement and optimize service delivery.¹⁴

Asia Pacific: Positioning for Gen Z

As with other regions, challenges and opportunities for the citizen experience abound across Asia Pacific. In one region-specific study, Genesys asked consumers which industries they associate with having exceptional customer experiences. Only 15% responded, “Government Agencies,” which ranked lowest out of the ten industry options.¹⁵ This is important to know, because negative government support experiences could have detrimental effects, particularly among younger citizens. “These findings highlight how easily organizations can harm their relationships with younger generations through poorly executed experiences. Long term, it’s an existential risk—Gen Z is the largest generation on earth.”¹⁶

Accelerating digitization should help address these challenges by enabling more seamless experiences. Meanwhile, cybersecurity is a priority across this vast part of the world. “From Singapore to India, companies are adopting zero trust frameworks to secure networks and sensitive data” while nations “are introducing stringent cybersecurity laws, such as Vietnam’s updated Data Protection Decree, to safeguard digital economies.”¹⁷ China’s cybersecurity law, “mandates that data collected within the country must be stored domestically.”¹⁸ Indonesia’s Government Regulation No. 71, “requires electronic system operators to store data locally.”¹⁹ And the Singapore government has launched an Operational Technology (OT) Cybersecurity Masterplan to enhance security and resilience.

Europe: Looking to Make Services More Human

At the AI Action Summit in Paris in February 2025, European Commission President Ursula Von der Leyen presented InvestAI, “an initiative to mobilise €200 billion for investment in AI.”²⁰ It signals a new focus on investing in AI rather than over-regulating it. As companies scramble to adapt to American tariffs that have sent shockwaves through the global economy, the EU now seeks to streamline rules in the midst of an intensifying competitive scramble with the US and China.

Meantime, the government of the United Kingdom has announced a plan to ramp up AI investment and usage across the public sector, a “pro-innovation approach” to regulation that aims to “deliver a decade of national renewal” and “improve lives for citizens.”²¹ For the UK Prime Minister, the hope is that the new AI Opportunities Action Plan will deliver real benefits to people across the UK and “make services feel more human.”²² And in France, the government seeks to modernize public services with a French made AI system. The program, called “Albert,” will aim to help public officials answer frequently asked questions, and save time (e.g., to help tax agents manage the 16 million queries they receive each year).²³

Finally, as in the United States, Europe is also keenly aware of the need for heightened levels of cybersecurity. The Cyber Resilience Act (CRA) of 2024 mandated that manufacturers introduce enhanced cybersecurity measures across a range of hardware and software products.



The Middle East: Aiming for Empathetic Citizen Support

In the Middle East there's a growing appetite for hyper-personalized, culturally relevant interactions. And digital transformation has become a cornerstone of CX. "In the UAE, the government's emphasis on digital transformation through initiatives like Smart Dubai and the UAE Digital Government Strategy has set the tone for organizations to prioritize customer-centric approaches. Meanwhile, in the Kingdom of Saudi Arabia (KSA), Vision 2030 has catalyzed unprecedented investment in public and private sector initiatives, from reimagining tourism experiences to streamlining digital public services. As a result, CX has become a cornerstone for achieving national objectives, such as fostering economic diversification and enhancing citizen satisfaction."²⁴

Even so, "As organizations increasingly rely on technology to enhance CX, there is a growing concern about the erosion of the human touch. While tools like AI-driven chatbots and automated workflows have improved efficiency, they often lack the emotional intelligence and empathy required to build meaningful customer relationships."²⁵ As such, a citizen support philosophy grounded in empathetic interaction takes on new urgency.

Africa: Growing Urgency for Better Citizen Experiences

There also happens to be a distinct urgency emerging across the continent of Africa for more empathetic and effective citizen support. In fact, in January 2022, the CX Touchpoints Group published an open letter urging governments all over Africa to make public sector customer experience the center of their public policy. The public sector experience continues to lag the private sector, the group wrote.

Specifically: "Some of the reasons for the poor public sector experience are the absence of laws governing public sector customer experience, the absence of ministerial departments dedicated to improving countrywide public sector customer experience, the lack of regulatory bodies designing and enforcing public sector customer experience policies, the absence of customer experience management in study curriculums, the fact that public administrators are not trained on customer experience and the fact that we do not celebrate customer experience best practices in the public sector, just to name a few."²⁶

Latin America: Modernizing a Human-Centric Approach

And what of the evolution of digital government across Latin America? According to the Organization for Economic Cooperation and Development (OECD), governments have embraced the adoption and use of digital tools for more transparent and efficient processes. "Technologically, Latin America is not as mature as Asia. But, compared to developed markets—such as the U.S. and some parts of Europe—this region leap-frogged in many aspects related to digital transformation."²⁷

For example, Andrea Iorio, host of Nvidia's "Vem AI" podcast, notes that, "I am very surprised by the speed at which AI has been adopted. I do loads of work for companies, but also governments. And it is interesting to see even they are now using chatbots and conversational AI. There is also the generative-AI side where companies are building their language models."²⁸ He goes on to illustrate the case of the state of Rio Grande do Sul, at the south of Brazil, which "is recognized as the most digitized region of the country.... But now they have a challenge, which is: even though everything is digitized, not everyone uses those new digitized systems. And so, they have to educate."²⁹

TAKEAWAYS

According to Gartner, by 2026, more than 70% of government agencies will use AI to enhance human administrative decision making.³⁰ However, human beings will remain central to the provision of a great citizen experience because, “Being empathetic also goes a long way in providing the experience citizens expect—and building trust in government.”³¹ Or as TP suggests—“While AI is certainly key in today’s CX environment, it can’t build customer relationships the way people can. That’s why we believe in combining the convenience of digitally advanced tools, the warmth and compassion of live customer experts, and the operational efficiencies achieved through our high standards of process excellence.”³²

THE TP APPROACH

TrendzOwl, TP, and Senture propose the following key action items for governments and their business process partners:

Meet the Challenge of Better Citizen Support Across Government

The public sector needs to continue advancing its capabilities in providing high-quality, end-to-end experiences that satisfy customers. For TP, this should include the provision of efficient and effective citizen experiences across a wide range of government realms, including: civil support, welfare and benefits support, healthcare support, educational and career support, travel and tourism support, and crisis management. TP hastens to add that niche government markets such as utilities, public transport, and regulation bodies also require high-quality assistance.



Continue Strengthening Citizen Trust through Secure Engagement

CIOs at public sector entities are already staying ahead of the cyber-attack curve, developing strategies for all manner of AI-related risk. TP urges public sector entities to continue building trust by complementing cybersecurity and privacy protection plans with strategies that address all manner of AI-related risks. As BCG notes, “To make the most of these technologies, public sector organizations will need to address a number of risks—including those related to accuracy and data ownership as well as the potential for AI tools to exhibit bias in their outputs. Leveraged responsibly, however, AI, GenAI, and other advanced data systems can enable governments to drive maximum public impact while lowering the cost of providing essential services.”³³



Approach Empathetic, Human-Centric CX Strategically

As AI adoption has accelerated, TP’s human-based business process services, featuring a combination of technology and emotional intelligence (EI), have expanded in turn. TP’s Thomas Mackenbrock points out that some of TP’s “most successful AI applications favor more employment... as they allow for better and faster ‘resolutions’ and a higher emotional connection between caller and agent.”³⁴ So, it’s important to be strategic in designing citizen support solutions. As EY points out, “Design thinking, customer experience labs and data analytics will help governments design their services to make each touchpoint better, faster and more efficient, and to move toward more proactive and even predictive service delivery.”³⁵



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