

Estonian populations' satisfaction with public e-services 2014

Main findings

TNS Emor



TNS Emor

© AS Emor



Survey objective and fieldwork

The objective of this survey was to determine the use of public sector e-services and portals by Estonian internet users and their satisfaction with services offered by the public sector in the electronic environment. The survey was commissioned by the Information System Authority in cooperation with the Ministry of Economic Affairs and Communications. The survey was conducted through EU structural instruments program „Raising Public Awareness about the Information Society”, funded by the European Regional Development Fund.

The target group of the survey were the permanent residents of Estonia aged 16-74. During the course of the survey we interviewed 1010 respondents of the corresponding age. 80% of them have used the internet during last two years.

The interviews were conducted from 19.11-26.11 and 03.12-11.12.2014 in the form of tablet assisted personal interviews at the respondents' homes.

Data concerning internet use and visiting of local government or State customer service centres has been analysed based on all respondents. Use of e-services in different fields, satisfaction with them and awareness of public e-services has been analysed among internet users. In this survey internet users were considered to be those Estonian inhabitants aged 16-74 who have used the internet during last two years. We asked about use of e-services in 2013 and 2014. The results were compared primarily to those of the 2012 survey, asking about the use of e-services in 2011 and 2012.

Summary of results

The number of potential e-services' users continues to increase.

During last week the share of internet users among 16-74-year-old Estonian inhabitants reached 77%. Only six years ago the share of weekly internet users was 61%. The share of those who have never used the internet has dropped to 18%. This survey, asking about the use of e-services from those who have used the internet during last two years covers 80% of the Estonian population aged 16-74.

The number of people with the skill to use the internet is increasing primarily due to younger generations. Those who don't know how to use the computer or internet are mainly older people aged 50 and older, who lack the interest or need to use the internet. The majority of people who don't know how to use the computer and internet (77%) are also not interested in acquiring those skills at corresponding courses.

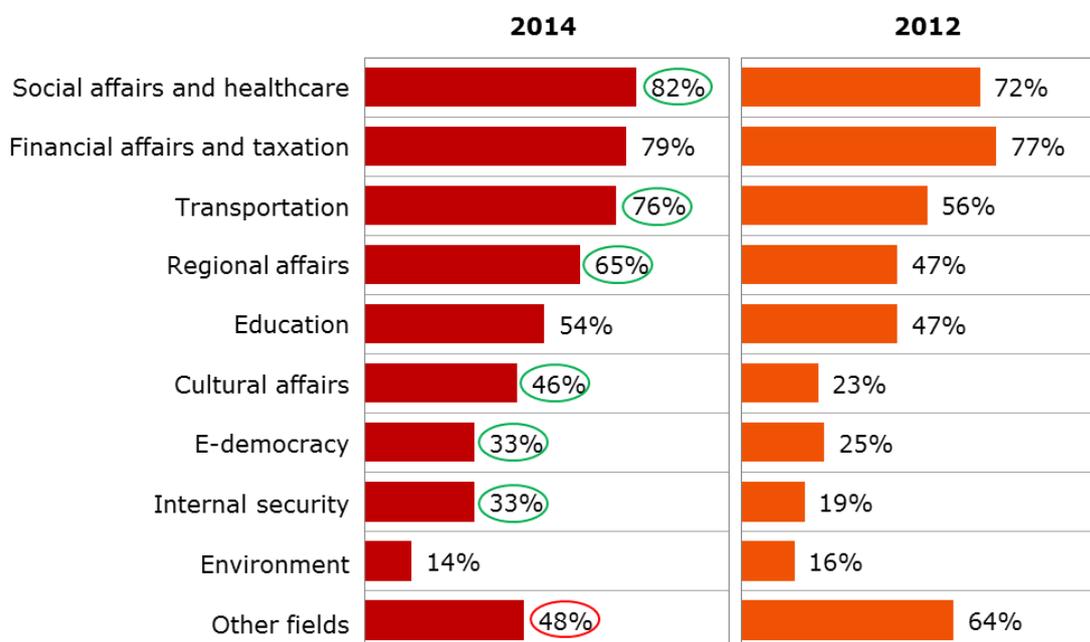
Local government customer service centres and home pages are visited the most.

Based on spontaneous answers, the customer service centres of local governments or state authorities have not been visited in 2013 and 2014 by 60% of Estonian inhabitants aged 16-74, home pages – by 39% of internet users. Visits to local government as well as Citizenship and Migration Board and Police and Border Guard Board customer service centres were mentioned spontaneously the most frequently. Visiting of home pages has increased compared to a couple of years ago and in addition to home pages of local governments that continue to be in the first place (visited by 27%), they also mentioned more frequently the portal eesti.ee, Riigi Teataja (11%) and the Tax and Customs Board (10%) web pages.

Use of e-services has increased in almost all areas.

Compared to 2012, the share of those who have used e-services in at least one area has increased in the fields of healthcare, social affairs, transportation, regional affairs, culture, e-democracy as well as internal security (see graph 1). The share of users has remained the same in the fields of financial affairs and taxes, education and environment. Digital prescription service (73%), falling in the field of social affairs and healthcare, and submission of electronic income tax returns (73%) in the field of financial affairs and taxation have been used the most. While the share of those who have submitted their income tax return had remained on the same level as a couple of years ago, the use of digital prescriptions has increased significantly (from 53% to 73% among internet users). It's in the fields of social affairs and healthcare, financial affairs and taxation, and transportation that the highest number of internet users have used at least one of the services in the field. This also according to data from 2012. The number of e-service users has increased on one hand due to an increased use of existing e-services as well as on the account of new e-services.

Graph 1. Share of internet users who have used at least one public e-service in particular field in 2012-2014



Comparison of respondents who have used at least one of the e-services mentioned in that field in 2013-2014 (2012 data covers use in 2011-2012).

Users are satisfied with most e-services.

There are services from all areas among e-services with highest satisfaction evaluations and there are significantly more of those with average satisfaction evaluations of 4.5 or more than e-services with lowest satisfaction. Satisfaction was less than 4 points only in case of four services. Those were use of Estonian Cemetery Portal through kalmistud.ee, use of services of medical institutions' patient portals, use of electronic data of Statistics Estonia through stat.ee and registering for Estonian language proficiency test and examination on the Constitution and Citizenship Act of the Republic of Estonia and viewing the exam results through eesti.ee.

The most used e-services with highest evaluations were purchasing medications using digital prescription (similarly to 2012) and purchasing ID tickets for recreational fishing rights (which has been used by approximately one tenth of internet users: 4.8 points out of 5 in both cases).

The use of e-services continues to be lower in certain social groups.

The typical user of e-services is an Estonian with higher education. On one hand, there are more internet users among people with higher education and that already creates a precondition for use of e-services. But among internet users, people with higher education are also the most frequently users of e-services. Among internet users with basic, secondary, specialised secondary or vocational education there are less users of e-services. While there are mainly young people among those with basic education, whose need for many of the services is lesser, on the whole the problem is still low digital literacy skills.

Another social group that uses e-services less is non-Estonians, primarily the Russian speaking population. Their contact with internet does not differ from that of the Estonian speaking population but non-Estonian internet users use many e-services less than Estonians. Among the measured areas, the only field where use of e-services does not vary based on nationality is environmental affairs. In terms of specific e-services, non-Estonians have used the following more than Estonians: registering for Estonian language proficiency test and examination on the Constitution and Citizenship Act of the Republic of Estonia and viewing the exam results through eesti.ee, making customs declarations through e-Tax Board or e-Customs, and e-Cultural Heritage. On one hand, the reason for this problem is non-Estonians' lower awareness of e-services: 27% (compared to 17% in case of Estonians) considered their awareness to be low and on the other hand, language problems might be an obstacle. In spontaneous comments, non-Estonians said they would like more information in Russian and more services in Russian.

Awareness and use of the State portal eesti.ee has increased even further.

Two years ago 68% of internet users were aware of the portal, now the number is almost 82%. Nearly two thirds of internet users have used the portal; in 2012 approximately half of them had done that. Among measured activities, sending documents to a public authority continues to be the most used one (19% of those who have used the portal during last two years). Lack of interest or need are the most common reasons given by those not using the portal (76%) but the number of those who are not aware of the possibilities offered by the portal has doubled (one fifth of non-users).

In developing e-services it is important to think of convenience of use.

Aspects associated with poor convenience of use were brought out by those users of e-services who were not satisfied with a service: using the service is complicated (43%), instructions and user support are insufficient (34%), using the service takes time (29%). People's expectations are that the existing service functions as promised, i.e. that smart applications work too. Low security of service was mentioned the least as a reason for dissatisfaction (8%).

As the number of e-services increases, increasing people's awareness of them becomes increasingly important.

Internet users' awareness of public e-services has not increased during two years: only 8% of them are very well aware of them and with those who are rather aware, the share of aware internet users reaches one third. 73% of internet users find that listing the services offered by the State or local governments on their web pages would help increase awareness of those services and assess the need for them.

General satisfaction with e-services offered by the State and local governments has not changed.

71% of internet users are on the whole satisfied with the offered public e-services and satisfaction is on the same level as two years ago. The majority of them agree that e-services have helped them save time (87%) and enabled them to get more information (85%). Three quarters of internet users also agree that e-services have helped them save money and decrease bureaucracy.