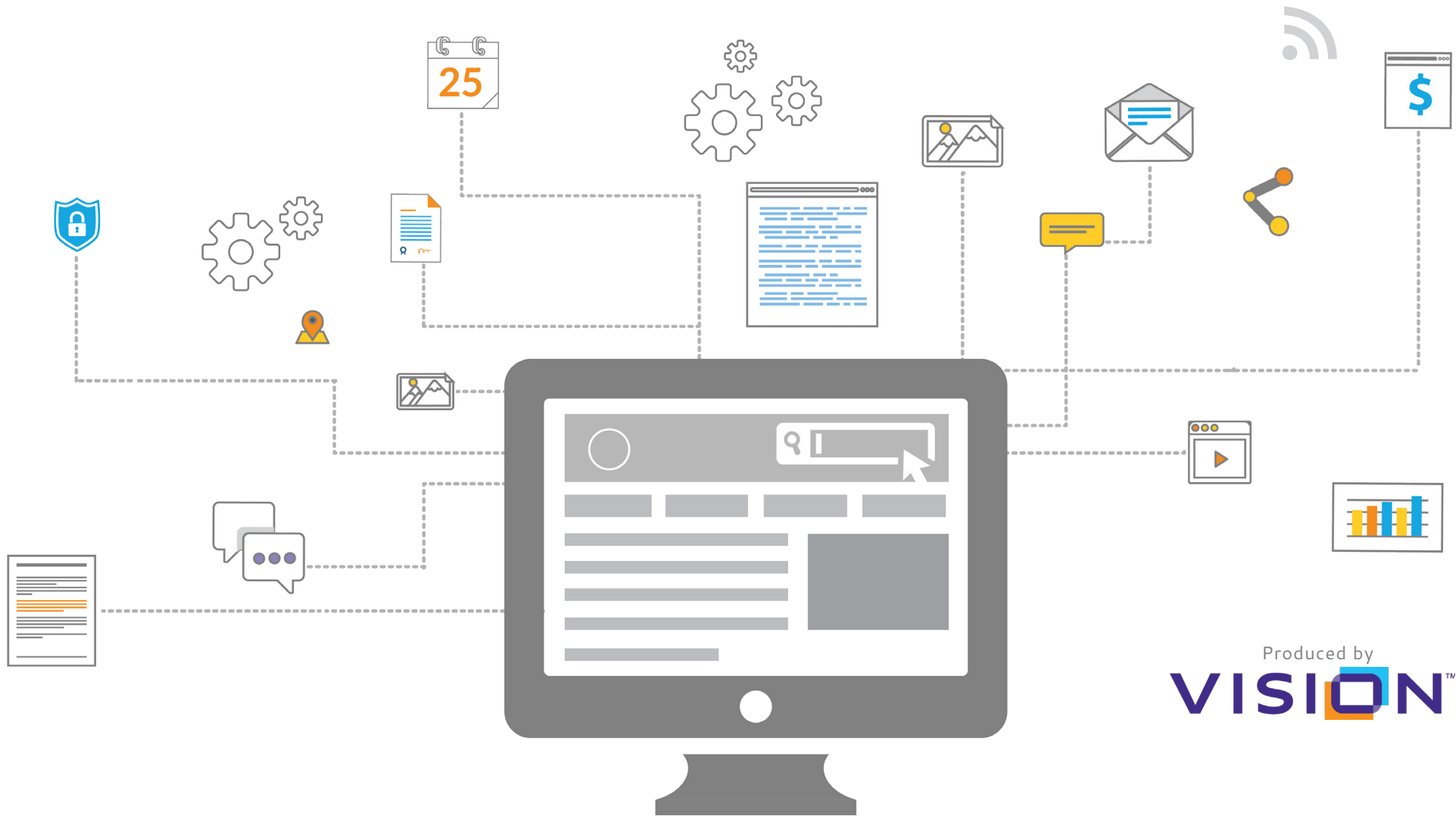


What's Next IN DIGITAL COMMUNICATIONS for Local Government 2016 Edition



Produced by
VISIONTM

About the Survey

For the second year, Vision Internet commissioned a survey to gauge the current state of digital communications in local government and project future trends. The online survey was distributed to 2,942 local government agencies in December 2015. Titled "What's Next in Digital Communications for Local Government," the 2015 survey realized a 4.8 percent response rate, representing 140 municipal and county government entities throughout the United States. The response rate places the survey confidence level at 95 percent with a +/-9 percent margin of error.

Similar to 2014, a good cross-section of population sizes is represented in this year's survey response data. Responding communities ranged in population size from less than 1,000 residents to nearly one million. Quantitative and qualitative input is summarized in this report.

Demographics

2015 survey respondents represented a broad spectrum of municipal and county population sizes:

- › Less than 10,000 (6.1%)
- › 10,000 to 19,999 (11.2%)
- › 20,000 to 49,999 (28.6%)
- › 50,000 to 74,999 (22.4%)
- › 75,000 to 124,999 (11.2%)
- › 125,000 to 249,999 (13.3%)
- › 250,000+ (7.1%)

Nearly 90 percent of survey respondents worked in the following three areas of local government:

- › Public Information/Communication/Marketing – 47%
- › Computer/Technical Services – 25%
- › Administration/Management – 18%

The Value and Challenges of Digital Communications

“ **W** e are representatives of the people and the people are using this technology daily.”
Survey participant – California

As in the 2014 survey, the majority of local government participants described their agency website as “integral to their overall communications and public service strategy,” with 71 percent responding that it was “essential” while another 26 percent said it was “important.” When evaluating the effectiveness of their agency website, responses were nearly identical to 2014: only 34 percent of respondents rated their websites as “highly effective” today, while 78 percent predicted they would be highly effective by 2020, which most likely explains why “website upgrade” was the top digital priority identified by survey respondents for 2016.

Of the 140 local government survey participants who rated “how well their website serves their community in terms of allowing visitors to conduct business online,” only 4 percent gave an “outstanding” rating, while 21 percent gave a “below average” or “poor” rating, and 75 percent said it was either “average” or “good.”

Perceptions were much more positive when respondents were asked how well their website reflects the unique brand of their community or organization. Twenty-two percent rated their website as “outstanding” while only 9 percent identified it as “below average.”

Predictions of the annual investment needed over the next five years to allow their IT/Communications budgets to keep pace with technology ranged from 0 to 100 percent or more. Mirroring last year’s results, the greatest percentage of respondents (32%) said they needed an annual increase of 10–19 percent.

The increasing importance of social media to local government operations is clear and showed the most significant year-over-year change when respondents were asked to rate the impact of various factors. The percentage of respondents who said social media was “already having a significant impact” on local government operations, jumped by 10 percent – to 92 percent (2015) from 82 percent (2014). Nearly all respondents (99%) agreed it would have a significant impact by 2020, yet only 42 percent of respondents felt their current social media presence was highly effective.

Respondents also predicted when other methods of outreach and communications would begin to have a significant impact on local government operations. The top 3 areas identified as “already having” or “will have” an impact by the end of 2016 are web accessibility, social media and citizen engagement.

Cybersecurity, mobile government and open data/financial transparency were the next three highest rated areas respondents predict will have a significant impact by the end of this year.

By 2020, all respondents felt citizen engagement would have a “significant” impact on local government, while 99 percent predicted the same for citizen collaboration, social media and web accessibility.

Websites and other means of digital communication remained at the forefront in helping local government get the word out in emergency situations. A significant majority (95%) of survey respondents deemed “disaster recovery/continuity of operations” to be “essential” or “important” to their agency.

“Already Having” or “Will Have” Impact on Local Government Operations by end of 2016

Web
Accessibility

96%



Social
Media

95%



Citizen
Engagement

91%



Making Local Government Accessible

“ More people are accessing everything via mobile technology and apps. They want to pay a bill with two taps on their phone. People are losing patience with local governments that are not making services accessible and easy to use.”

Survey participant – Wisconsin

Mobile government continues to be a top digital trend as citizen expectations for mobile access increase. More than 91 percent of respondents predict that mobile government will be “essential” or “important” to their agency within the next 5 years.

Removing barriers that prevent interaction with or access to websites by people with disabilities is another growing concern for local government agencies. Guidelines and mandates, such as ADA, WCAG 2.0 and Section 508, are increasingly being enforced at the local level. An overwhelming number of respondents (89%), however, had moderate, weak or no knowledge of these Federal web accessibility requirements.

For some, cultural challenges and procurement obstacles continue to be barriers to expanding government technology and accessibility. Comments by respondents explaining their own local issues included:

“ While we have the responsibility to keep pace with technology, we typically don’t. Some of this is due to being linked to age-old systems and the difficulty and complexities in changing or switching to something else.”

Survey participant – Texas

“ It’s important to keep pace with technology to be able to communicate with citizens, but budgets and staffing are roadblocks.”

Survey participant – Florida

“ In order to keep government costs down, government entities need to hit the state-of-the-art sweet spot between cutting edge and antiquated technology.”

Survey participant – Colorado

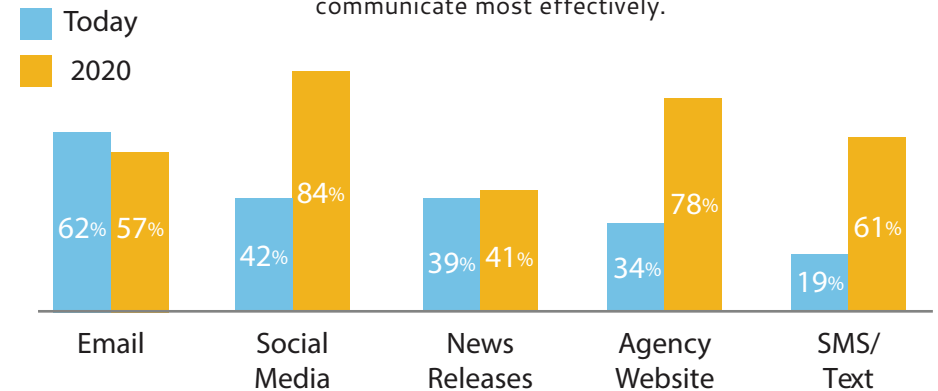
Trends

Information Delivery: Comparing respondents' perceptions of how effective their agencies' channels of citizen communications are today to what they think it will be in 2020 revealed an interesting shift. Today, the top "highly effective" ranking was Email (62%) followed by social media (42%), news releases (39%), agency website (34%) and SMS/Text (19%). But respondents predict a dynamic shift by 2020, with social media topping the "highly effective" ranking (84%), closely followed by agency website (78%), SMS/Text (61%), Email (57%) and news releases (41%).

The order of these 2020 predictions is in stark contrast to last year's results. While anticipation of highly effective agency websites by 2020 remained unchanged at 78 percent, social media leapfrogged it in this year's survey to 84 percent from 63 percent in 2014. The growing importance of SMS/Text also is evident, with predictions for 2020 skyrocketing to a "highly effective" rating of 61 percent from 37 percent in last year's survey.

Most Significant Impact on Local Government Operations by 2020

As agencies look to the future, they predict big changes in the tools that will enable them to communicate most effectively.



“Residents and the community are using digital platforms more than ever; keeping pace with that technology is essential to reach those individuals where they are most active and attentive.”

Survey participant – Illinois

Analytics and Updates: The majority (56%) of 2015 survey respondents tracks and analyzes their digital website metrics, including identifying their most visited web pages, at a minimum of once per month, with a handful tracking it daily. When asked if they adjusted their web strategies and updated their homepages based on those analytics, 79 percent said “yes.”

Keeping Pace with Technology: In a forward-looking survey question, 95 percent of respondents believe local governments have the responsibility to keep pace with ever changing technology. This response is in line with 2014 survey results of 94 percent, and the question again generated the largest number of write-in comments including:

“*The Millennial generation expects to interact with government in a digital capacity and we must meet them where they are. It is essential as a means to deliver information, create open data standards and promote economic development.*”

Survey participant – North Carolina

“*More and more of our citizens use mobile technology to communicate, and more and more are digital natives.*”

Survey participant – Louisiana

“*As they say, 'All politics is local.' Our elected leaders have already started to hear concerns about our inability to offer 'easier access' to information and services. Keeping pace with technology is necessary to meet those demands.*”

Survey participant – Maryland

Citizen Engagement

Citizen engagement continues to be an important focus for local government agencies in 2016 and beyond.

“The Internet is how more and more people want and choose to access info and conduct business. It’s a matter of customer service and citizen engagement.”

Survey participant – Texas

Limited citizen engagement was far and away the biggest problem respondents face with their current websites. More than 81 percent cited it as one of their site’s top three issues, despite the fact that 98 percent see it as “essential” or “important” to their agency. Moreover, 100 percent of respondents said citizen engagement would have a significant impact on local government operations by 2020, but only 5 percent currently consider their agency “outstanding” in effective citizen engagement and 12 percent rated their agency “below average.”

The top three barriers impacting effective citizen engagement were identified as:

Public Apathy



Public Not Aware of Opportunity



Inconvenient Timing



When asked to rank the topics their citizens cared about most, survey respondents said:

Police and Fire Issues

61%



Traffic Issues

50%



Jobs

46%



Summary

“*Technology changes the standard of communication and culture.*”

Survey participant – California

Change doesn't happen quickly in the public sector, but the good news is that it's happening from the bottom up on the local level where it has the greatest impact on people's lives. As citizen expectations continue to be shaped by our mobile and social world, 95 percent of the local government leaders surveyed believe they have the responsibility to keep pace with their citizens' digital habits – up one percent from last year's survey.

Municipal websites, social media, SMS/Text, mobile gov, geo location-based services, and other digital communications tools are helping municipal and county governments become more accessible, convenient, interactive and transparent for the people they serve. At the same time, pervasive connectivity and The Internet of Things are creating smart cities that redefine the citizen experience.

Effective communications requires a focus on the citizen... not the local government agency. And effectively engaging citizens day in, day out and year-round requires that a local government provide information and functionality that citizens value.

The significant jump in respondents' perceptions of the importance of social media and SMS/Text since last year's "What's Next" survey is further evidence of the evolving digital landscape, but local government websites remain the hub in the wheel of citizen communications and a top priority for investment in 2016.

Takeaways from this year's "What's Next" survey are clear. Local government leaders recognize their responsibility to make their communities better for residents, and are increasingly looking at their citizens as "customers" who deserve the best service they can deliver.



ABOUT VISION

Headquartered in El Segundo, Calif., Vision Internet is a national leader in government website development with more than 700 government, non-profit and education clients in U.S. and Canadian communities with populations that range from less than 1,000 residents to more than 5 million. For more than 20 years, Vision has created cost-effective solutions that increase government efficiency, transparency and interactive communications with citizens. The company's powerful, easy-to-use visionLive™ content management system continues to evolve with feedback from hundreds of municipal clients. In 2016, Vision was named to Government Technology magazine's GovTech 100, a listing of leading companies developing innovative or disruptive offerings to improve or transform government. For more information please call 888.263.8847 or visit visioninternet.com/inforequest.

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