What’s Next in Digital Communications for Local Government

2018 Research Brief
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Welcome to our fourth annual Vision What’s Next survey. This year’s survey underscores local government leaders’ commitment to delivering superior digital experiences, with 97% of our 365 survey respondents* recognizing an important need to “keep pace with ever-evolving technologies.”

Our latest research indicates that government leaders are exploring a broader mix of technologies to engage diverse audiences, while still viewing their website as the central hub for digital communications. Mobile is a maturing trend this year, with survey respondents no longer asking “should we ensure our website is mobile-ready?”, but rather “how do we really engage mobile users?”. One of the most convincing pieces of evidence of this maturation was the rise in text messaging. We saw a 12% year-over-year increase in respondents who ranked text messaging as an extremely effective communications channel.

Read on for all the findings from our annual survey, and consider how your organization stacks up against your peers in these four main areas:

1. technology priorities and budget
2. challenges and opportunities
3. digital tools and investments
4. effective channels and metrics

To take your digital communications efforts to the next level, take a look at our recommendations on the last few pages of this report.

*See Methodology and Demographics, page 23.
Local government agencies are feeling compelled to keep up with innovation.

97% of local government agencies see an important “need to keep pace with ever-evolving technologies.”

“Expanding citizen engagement” is a top priority for 2018, followed by “improving web accessibility and adherence to Web Content Accessibility Guidelines (WCAG) 2.0” and “minimizing cybersecurity risks.”
Local governments are feeling compelled to keep up with innovation. In fact, 97% of local government agencies surveyed see an important “need to keep pace with ever-evolving technologies.” This is the fourth year that respondents have ranked the “need to keep pace” in the 90th percentile, showing steady growth from 94% in 2015.

A growing number of local government leaders believe local government has a responsibility to **KEEP PACE WITH TECHNOLOGY**
Analyzing trend data on budget, we found the budget increases respondents said they need to keep pace with technology over the next five years has steadily gone down.

Respondents felt the costs to keep pace with technology change have decreased, as evidenced by the 13% fewer respondents who believe they need more than a 20% increase in budget over the next five years. This swing in perception may be an indicator that budget constraints will be less of a challenge over the next five years.
When asked about agency technology investment priorities for 2018, “expanding citizen engagement” emerged as a clear leader at 66%, followed by “enhance web accessibility and adherence to WCAG 2.0” at 53% and “minimizing cybersecurity risks” at 41%. Interestingly, the latter two responses are generally seen as a component of risk mitigation, yet fall behind the proactive activity of “expanding citizen engagement” in terms of agency priorities.

The top AGENCY PRIORITIES for 2018

- Expand Citizen Engagement: 66%
- Improve Web Accessibility & Adherence to WCAG 2.0: 53%
- Minimize Cybersecurity Risks: 41%

"We very much want to actively engage with our residents so our communication becomes a dialogue rather than a monologue."

- Communications Coordinator
91% of survey respondents say their website is extremely or very important to their overall communications strategy.

While the website is seen as central to the overall communications strategy, 41% say their website is difficult to navigate.

Web accessibility is top of mind for many agencies, yet 66% of respondents say they’re only “somewhat in compliance.”
Local government agencies continue to see their websites as central to their overall communications strategies. Sixty-three percent of respondents cited their website as “extremely important” and 28% cited it as “very important” to their overall communications strategy.

The website is **EXTREMELY OR VERY IMPORTANT**
to our communications strategy

91%
Extremely or Very Important
Survey respondents were asked to rank top challenges with their current website. The top three challenges were similar to last year, with one exception – “does not meet accessibility standards” took a top spot, displacing “not mobile-ready,” which dropped to the bottom of the list this year. Not only is developing and maintaining an accessible website the right thing to do, it is also the law. Regardless of what you may have heard, local governments are responsible for providing an accessible website that conforms to WCAG 2.0 AA standards.

Also topping the list of website challenges again this year is “limited citizen engagement” and “difficult to navigate.” The difficult to navigate challenge moved up one spot to number two this year, indicating increasing complexity as local agencies look to serve diverse populations.

The three **BIGGEST ISSUES** respondents identified relative to their **CURRENT WEBSITES** were:

- **Limited Community Engagement**: 49%
- **Difficult to Navigate**: 41%
- **Doesn’t Meet Accessibility Standards**: 29%
The majority of local leaders ranked themselves average or above average in their ability to tackle the top three challenges facing their agencies, which include the effectiveness of citizen engagement, ease of finding information on the website, and adherence to web accessibility.
Local governments do not exist in a vacuum, they face external threats that impact the way they operate and communicate. Not surprisingly in this age of hacking, “cybersecurity threats” were ranked as the top trend impacting local government communications operations.

“Citizen engagement” and “social media” followed closely behind cybersecurity as top factors impacting local agency communications. Today’s reality is, opinions are being expressed and comments aired with or without the government voice.

**Top trends IMPACTING government communications**

- **Cybersecurity Threats**: 27%
- **Citizen Engagement**: 24%
- **Social Media**: 13%
DIGITAL TOOLS AND INVESTMENTS

- 53% of respondents cite their website as an area for investment or expansion in the coming year.
- 80% of respondents plan to use social media tools in 2018.
- Some agencies are embracing newer digital tools, such as video (35%) and GIS services (30%).
Government websites are becoming more than a source of static information, which is apparent in the planned digital investment areas uncovered by our 2018 survey.

General “website updates” ranked as the number one area of investment at 53%, which is up significantly from past years. This suggests that local government agencies understand the growing importance for continuous improvement to meet rapidly changing citizen expectations. Interactivity is clearly a priority, with social media and citizen engagement ranking among the top three areas for investment.

Video ranks 4th as an area of investment in 2018. We continue to see increasing awareness of the use of on-demand video content, especially to drive engagement with younger audiences who are less likely to have cable streaming in their home. And finally, investment interest in GIS services is growing.

**The top 5 areas for AGENCY INVESTMENT**

<table>
<thead>
<tr>
<th>Area</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website Updates</td>
<td>48%</td>
<td>53%</td>
</tr>
<tr>
<td>Social Media</td>
<td>44%</td>
<td>50%</td>
</tr>
<tr>
<td>Citizen Engagement</td>
<td>56%</td>
<td>43%</td>
</tr>
<tr>
<td>Video</td>
<td>29%</td>
<td>35%</td>
</tr>
<tr>
<td>GIS Services</td>
<td>18%</td>
<td>30%</td>
</tr>
</tbody>
</table>
When asked about the Web 2.0 tools that are in use today, social media and text messaging come into focus.

Social media tools continue to remain significant to local government, taking the top spot this year in terms of tools used. While email tools continue to be leveraged, they are trending down while text messaging tools are trending up. Video tools are also on the rise among local government.
CHANNEL EFFECTIVENESS AND METRICS

- Text messaging is growing as a more effective communications channel while email is trending down.
- Social media and agency websites are predicted to be the most effective communications channels in 5 years.
- More than half of respondents do not make changes to their websites based on web metrics.
When evaluating communication channel effectiveness, social media has consistently ranked as one of the most effective channels for local government, holding steady in the number one position for two years running. The agency website remains central and relevant to digital communications, ranking as the second most effective communications channel this year, just behind social media. Email continues to trend down while text messaging is gaining momentum. Government blogs are viewed as the least effective channel, with the traditional press release channel proving more effective.

**Most effective CHANNELS OF COMMUNICATION** over the last three years

<table>
<thead>
<tr>
<th>Channel</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Media</td>
<td>42%</td>
<td>43%</td>
<td>48%</td>
</tr>
<tr>
<td>Agency Website</td>
<td>34%</td>
<td>26%</td>
<td>36%</td>
</tr>
<tr>
<td>Email</td>
<td>62%</td>
<td>41%</td>
<td>33%</td>
</tr>
<tr>
<td>Text Messaging</td>
<td>19%</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Press Release</td>
<td>29%</td>
<td>28%</td>
<td>15%</td>
</tr>
<tr>
<td>Blog</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>
When asked to predict the effectiveness of communications channels in five years, survey respondents were quite optimistic about their agency websites. Sixty-six percent of respondents anticipate their future websites to be “highly effective” – only to be topped by social media, with 73% of respondents expecting this channel to be highly effective in five years.

It is also interesting to note the steep increase in effectiveness expected from text messaging (50%) versus email (32%).

The most effective communication channels in five years are:

- **Social Media**: 73%
- **Agency Website**: 66%
- **Email**: 33% today, 32% in 5 years
- **Text Messaging**: 29% today, 50% in 5 years

**Most Effective Channels of Communication Today and in 5 Years**
While there is great anticipation for agency websites to maintain a critical place in the overall communication strategy, it is discouraging to see how only a small percentage (13%) of respondents are analyzing the performance of their website on a daily or weekly basis.

The remainder, 87% look at website performance metrics monthly, quarterly, annually, or not at all. Website analytics are becoming increasingly important to drive change and align with rapidly changing citizen expectations.

**How often respondents analyze website performance**

- Daily: 3%
- Weekly: 10%
- Monthly: 32%
- Quarterly: 25%
- Annually: 11%
- Never: 19%
SUMMARY AND RECOMMENDATIONS

Thanks to the explosion and availability of affordable digital technologies, proactive agencies are poised to drive significant change in the way they interact with their communities. Based on our latest findings, we put together a list of recommendations that can serve as building blocks for a highly effective digital communications strategy.

1. Take a “hub and spoke” approach: Our research clearly indicates a preference for maintaining the agency website as the core communication vehicle. To accomplish this goal, it’s important to ensure your website is truly the digital hub, with all other channels functioning as spokes from that hub. Each of your communications channels – email, social, text messaging – must direct your users back to your website for more information. It might be tempting to ignore website in favor of channels that seem easier, quicker or more direct (social media for example), but the hub and spoke approach demands that every aspect of your digital presence is equally fresh.

2. Focus on freshness: Which would you rather have, a beautiful website that has all the fancy bells and whistles the day it launches, or an attractive, easy-to-navigate website that keeps users coming back for more with frequently updated content? If you picked the latter, you are well on your way to providing a great customer experience. If you are investing in a website, consider the underlying content management tools that will help keep content up-to-date.
Get to know your audience. Helping customers easily navigate to what they are looking for continues to be a challenge as government agencies work to serve diverse populations. To combat this challenge, consider holding a persona and customer journey workshop. In the workshop, break down the top personas visiting your website and define them clearly. Once the personas are developed, consider the top tasks they are looking to perform on your website and what devices they are most likely using to perform the task. Take the time to walk through each task with the department head responsible for the content and evaluate how intuitive it is, identifying areas for improvement along the way. This exercise is useful and helps your content contributors think in a service-minded way. Vision offers expert-led content strategy training that can help.

Evaluate your communications channels at least once a year: Our survey suggests that channel effectiveness is constantly changing. Consider the current mix of communication channels you leverage outside of your website – social, press releases, emails, etc. – and evaluate their effectiveness. First, make sure you aren't overdoing it, inundating your audience with the same content on five different channels. Rather, consider the most appropriate channel given the message. Are there certain channels where your audience tends to engage more? Does your audience respond differently to certain types of information on different channels?

Choose new communications channels wisely: Consider the digital habits of your audience. Where are they spending their time online? Are they using a mobile device? If so, how often and for what? There is no point in launching an Instagram presence if the vast majority of your audience doesn’t even know it exists.
Summary and Recommendations

Use website analytics to measure the effectiveness of your content: From the survey results, it was clear that actively monitoring website and content performance is not the main focus for the majority of our respondents. If you are one of the few people at your agency in charge of website analytics, consider pushing out regular reports. You can even run contests among contributors or departments – awarding the individuals or teams that are gaining in engagement and influence. A gamified approach can be a great way to incentivize and educate your content contributors. It’s important to establish a cycle of measurement and rewriting in order to maintain high-quality content that serves and engages your customer.

Adhere to the current accessibility guidelines: WebAIM.org is an excellent resource. If the web CMS isn’t purpose-built to support compliance, consider that when re-evaluating your communications technology. Creating accessible content is the responsibility of everyone at your agency who logs into your CMS. Every web editor must be trained in best practices to ensure a consistent, compliant, accessible experience for your website visitors.
METHODOLOGY AND DEMOGRAPHICS

An online survey was conducted by Vision to gauge the current state and future trends of digital communications. The survey was completed by 365 municipal and county agencies located in the United States. The survey confidence level is at 95% with a +/- 5% margin of error.

The cross-section of population is represented by communities with populations ranging from less than one thousand to more than one million. Both quantitative and qualitative input is summarized in this report.

Demographics
Survey respondents represented a spectrum of municipal and county populations:

- Less than 10,000 (7.3%)
- 10,000 to 24,999 (12.7%)
- 25,000 to 49,999 (15.6%)
- 50,000 to 99,999 (26.9%)
- 100,000 to 249,999 (24.0%)
- 250,000 to 499,999 (6.5%)
- 500,000 + (6.9%)
- 79% of respondents were cities and 21% were counties
- 83% of respondents were Vision clients
- 73% of respondents worked in the following areas of local government
  - PIO/Communications/Marketing (28%)
  - Information Technology (24%)
  - Administration/Management (21%)
ABOUT VISION

Vision is a national leader in government website development with more than 800 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. For three years in a row, Vision has been 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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