

WHAT'S NEXT IN DIGITAL COMMUNICATIONS FOR LOCAL GOVERNMENT 2017 Edition

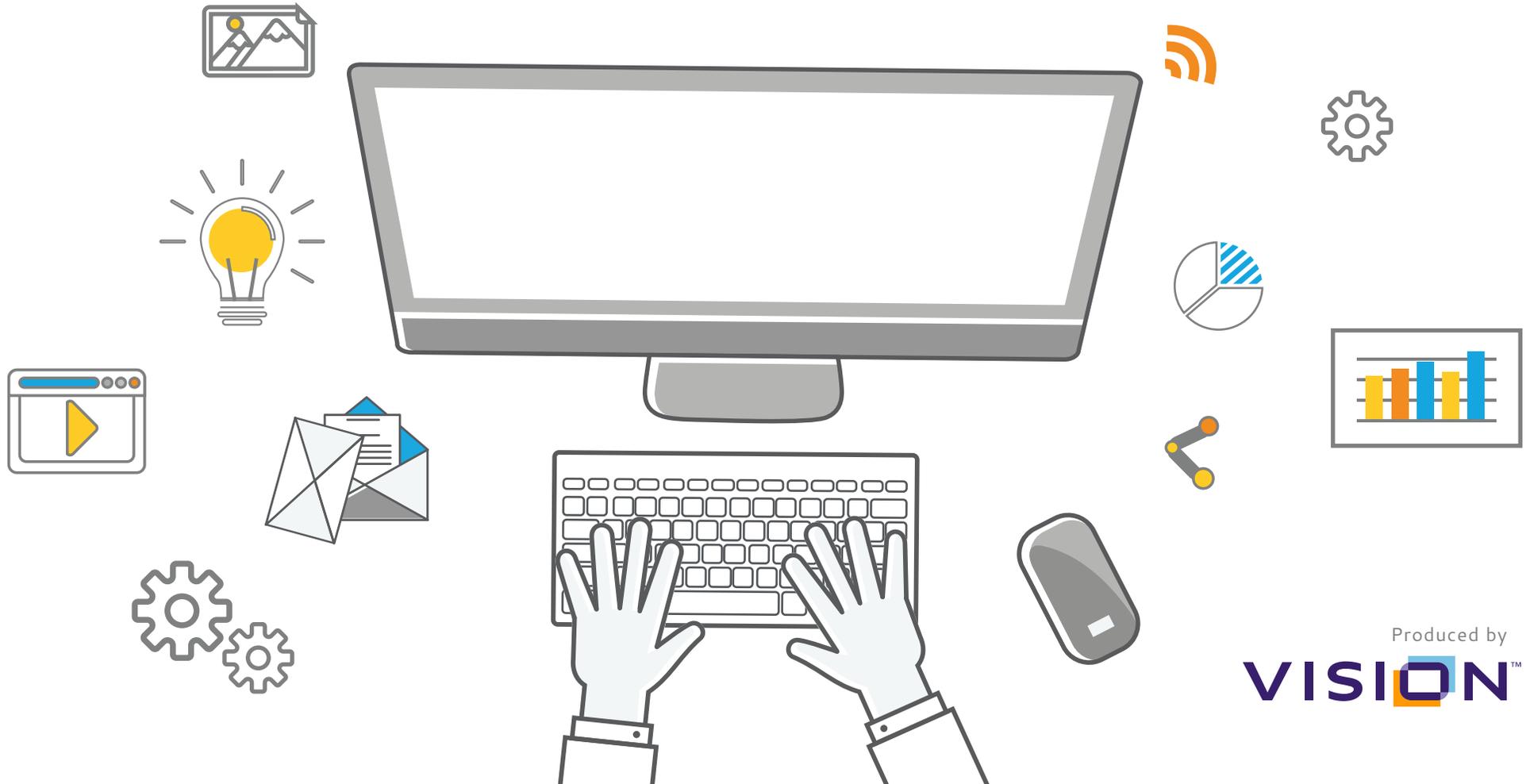


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ABOUT THE SURVEY

For the third year, Vision commissioned a survey to gauge the current state of digital communications in local government and project future trends. The online survey was distributed to 3,696 local government agencies in December 2016. Titled “What’s Next in Digital Communications for Local Government,” the survey realized an 11.8 percent response rate, representing 436 municipal and county government entities throughout the United States and Canada. The response rate places the survey confidence level at 95 percent with a +/- 4% margin of error.

A good cross-section of population sizes, functional responsibilities and geographic diversity is represented in this year’s survey response data. Quantitative and qualitative input is summarized in this report.

DEMOGRAPHICS

2017 survey respondents represent a broad spectrum of municipal and county population sizes:

- Less than 10,000 (8.1%)
- 10,000 to 24,999 (18.1%)
- 25,000 to 49,999 (21.9%)
- 50,000 to 99,999 (24.2%)
- 100,000 to 249,999 (18.4%)
- 250,000 to 499,999 (5.2%)
- 500,000+ (4.2%)

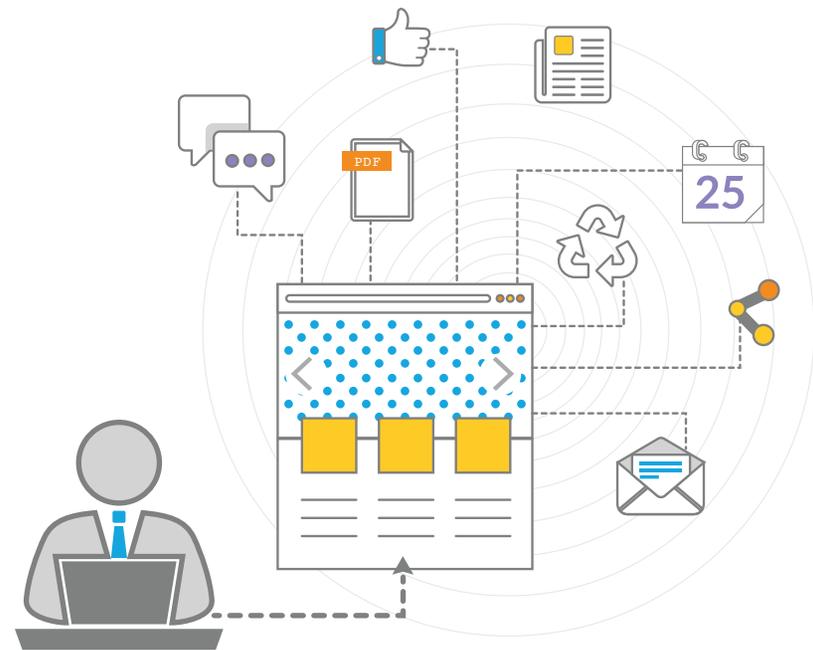
Elected and appointed local government officials and administrators represented the largest group of respondents this year and nearly doubled compared to last year, (to 34% from 18%) suggesting the growing importance of citizen communications. Rounding out the top 3 functional areas represented by respondents are Public Information/Marketing (32%) and Information Technology (13.5%).

IS LOCAL GOVERNMENT OBLIGATED TO KEEP PACE WITH CHANGING TECHNOLOGY?

Local governments are no different than business; they have clients that expect modern access to data and systems. Technology is changing the way local governments operate.

- Director of Information Systems, Minnesota

The overwhelming majority of government leaders believe that, yes, local governments have the responsibility to keep pace with ever-changing technology. That's how more than 97 percent of survey respondents answered this forward-looking survey question in 2017, tracking upward from 95 percent in 2016 and 94 percent in 2015.



As in prior years, this question generated a large number of write-in comments including:

“
As technology evolves, so does communications.
We have to keep pace with the changing
environment or the message gets lost.
– **County Council Member, Alberta, Canada**”

“
When we fall behind it often costs more to catch up
than if we had made the investment initially.
– **Village President, Illinois**”

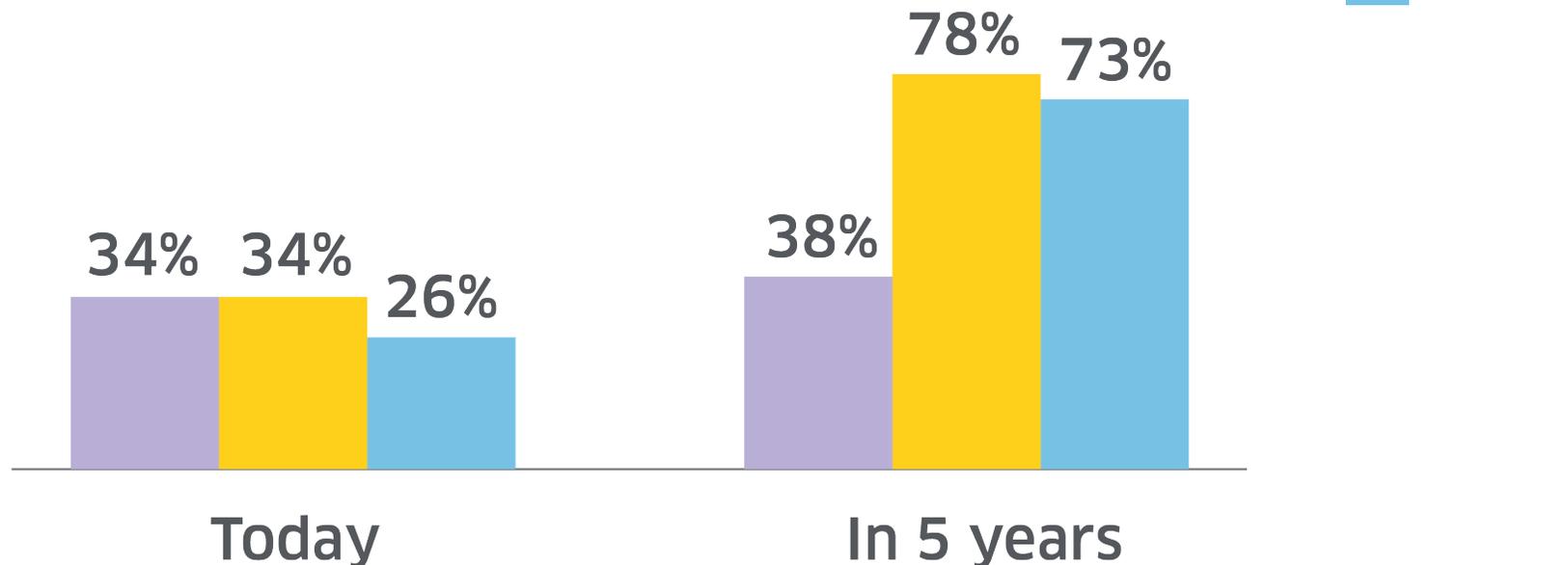
“
The website has the capability
of doing more, but some staff/
council are stuck on keeping
things the way we have always
done it instead of embracing
change for the better.
– **Recreation Manager,
California**”

“
We can't be stuck in the past. While some may view it (technology) as a waste of dollars, it
actually helps productivity.
– **Economic Development Chief of Staff, Nebraska**”

For the third year in a row, the majority of local government participants describe their agency websites as “integral to their overall communications and public service strategy,” with 68 percent responding that it is “essential” while another 25 percent said it’s “important.”

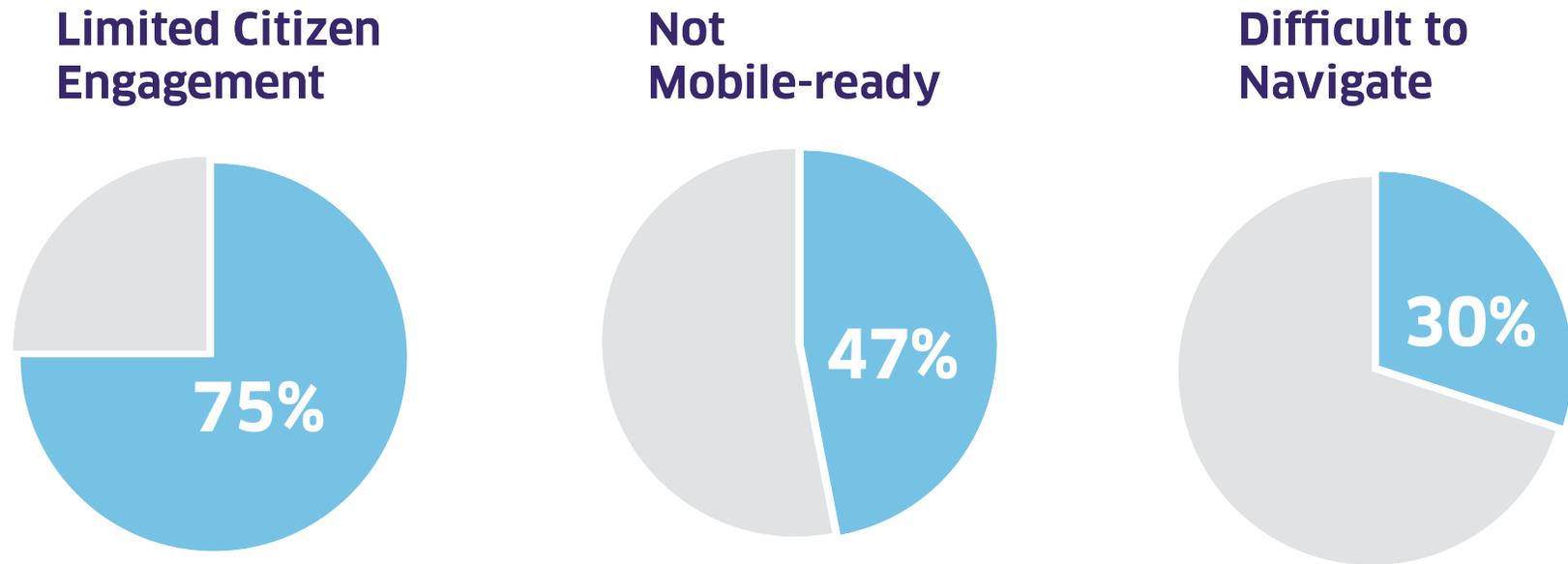
The number of respondents who rate their agency’s website as “highly effective”, however, shows a notable drop this year – to 26 percent from 34 percent in last year’s survey. Nearly three-quarters of respondents (73%), however, predict they will be highly effective in 5 years, also slightly down from the previous two years.

Respondents’ predictions on when their agencies’ websites will be highly effective



Of the local government survey participants who rated “how well their website serves their community in terms of visitors quickly and easily finding what they seek or conducting business online,” the percentage of respondents who rate their websites as “outstanding” doubled to 8 percent from 4 percent in 2016. Sixteen percent give their website a “below average” or “poor” rating, while, once again, three-quarters of respondents (76%) rate their website either “average” or “good.”

The three biggest issues respondents identified relative to their current websites were:



This correlates with responses to the question about priorities for the next 12 months, in which three out of four local gov leaders (75%) cited “expand citizen engagement” as an important focus. Rounding out the top three priorities for 2017 were mobile integration/responsive design (59%) and minimize cybersecurity risks (47%).

Forecasts of the annual investment needed over the next 5 years to allow their IT/Communications budgets to keep pace with technology range from 0 to 100 percent or more. Mirroring the prior two years' results, the greatest percentage of respondents (30%) said they will need an annual increase of 10–19 percent.

Looking more closely at future plans, of 12 areas listed, the top 5 identified for agency expansion or investment in 2017 are:

- 1 Citizen engagement
- 2 Social media
- 3 Website upgrade
- 4 Data and analytics
- 5 Mobile apps



THE NEED TO ENGAGE CITIZENS

I believe we could benefit from receiving more feedback from citizens as to what they would like to see/be altered.

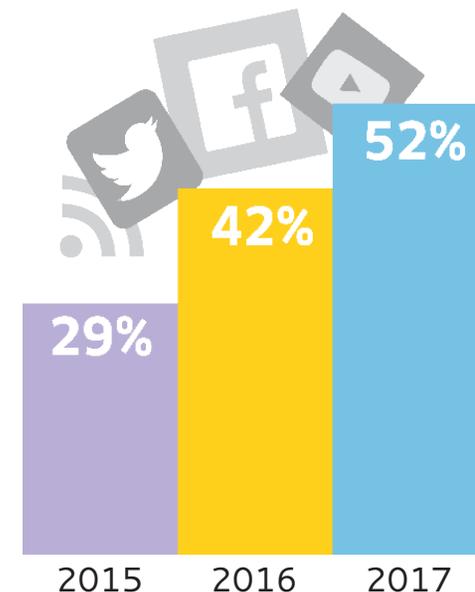
- **Communications Director,
New Mexico**

On a scale of 1 to 5 (where "5" is outstanding and "1" is poor) only 5 percent of local government leaders rank their agencies "outstanding" in effective citizen engagement, while 18 percent said their agencies were "below average" or "poor."

For the third year in a row, respondents rank social media first among various factors currently impacting local government operations. More than 86 percent of respondents said social media is "already having

a significant impact" on local government operations, while 97 percent agreed it will continue to have a significant impact in 2020. More than half (52%) of respondents believe their current social media presence is highly effective – a 10 percent increase over 2016.

Respondents who rate current social media presence "highly effective"



Respondents also predicted when other methods of outreach and communication will begin to have a significant impact on local government operations. The top 5 areas identified as “already having” or “will have” an impact by the end of 2017 are:

Web Accessibility

95%



Social Media

92%



Citizen Engagement

86%



Cybersecurity Threats

82%



Open Data/ Financial Transparency

81%



“

Conversations among our constituents are happening in this technological environment. It is our duty to tune in.

– **Communications & Marketing
Director, Ohio**

”

By 2020, 98 percent of respondents feel web accessibility will have a “significant impact” on local government, while 97 percent predict the same for social media and citizen engagement.

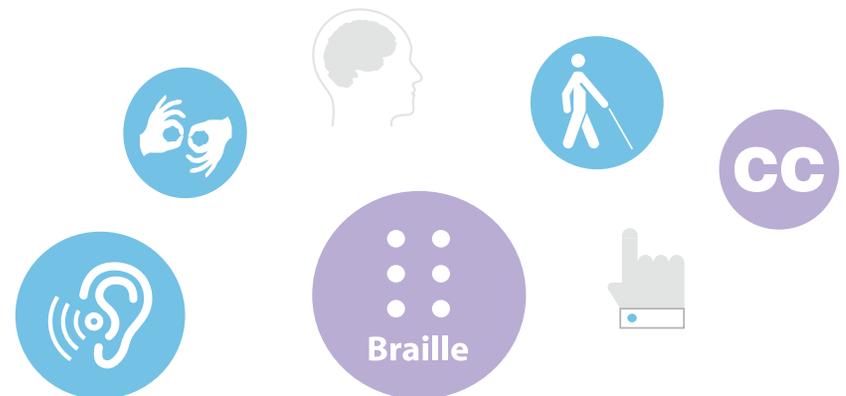
MAKING LOCAL GOVERNMENT ACCESSIBLE

Federal mandates calling for the removal of barriers that prevent interaction with or access to websites by people with disabilities are a growing concern for local government agencies. New rules on Americans with Disabilities Act (ADA) compliance for websites will be issued in 2018 and existing guidelines, such as ADA, WCAG 2.0 and Section 508, are increasingly being enforced. Yet, survey results reveal that the level of accessibility knowledge among local government leaders remains low. An overwhelming number of respondents (87 percent in 2017 compared with 89 percent in 2016) have moderate, weak or no knowledge of Federal web accessibility requirements.

For some, staffing challenges and procurement obstacles continue to be barriers to expanding government technology and accessibility.

98% believe web accessibility will have a “significant impact” on local government by 2020.

87% report having moderate, weak or no knowledge of Federal web accessibility requirements.



“

We try our best to keep citizens aware, making information available, yet it all still takes some staff time and energy for all of these issues. Many smaller governments cannot afford to invest what is required.

- **County Commissioner, Minnesota**

”

“

Too many departments, too much information to have to make easily accessible.

- **Senior Advisor-Policy & Communications, Utah**

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“

Public service is the backbone of our society. We should make every effort to provide services to the public in the ways they prefer.

- **County Commissioner, Missouri**

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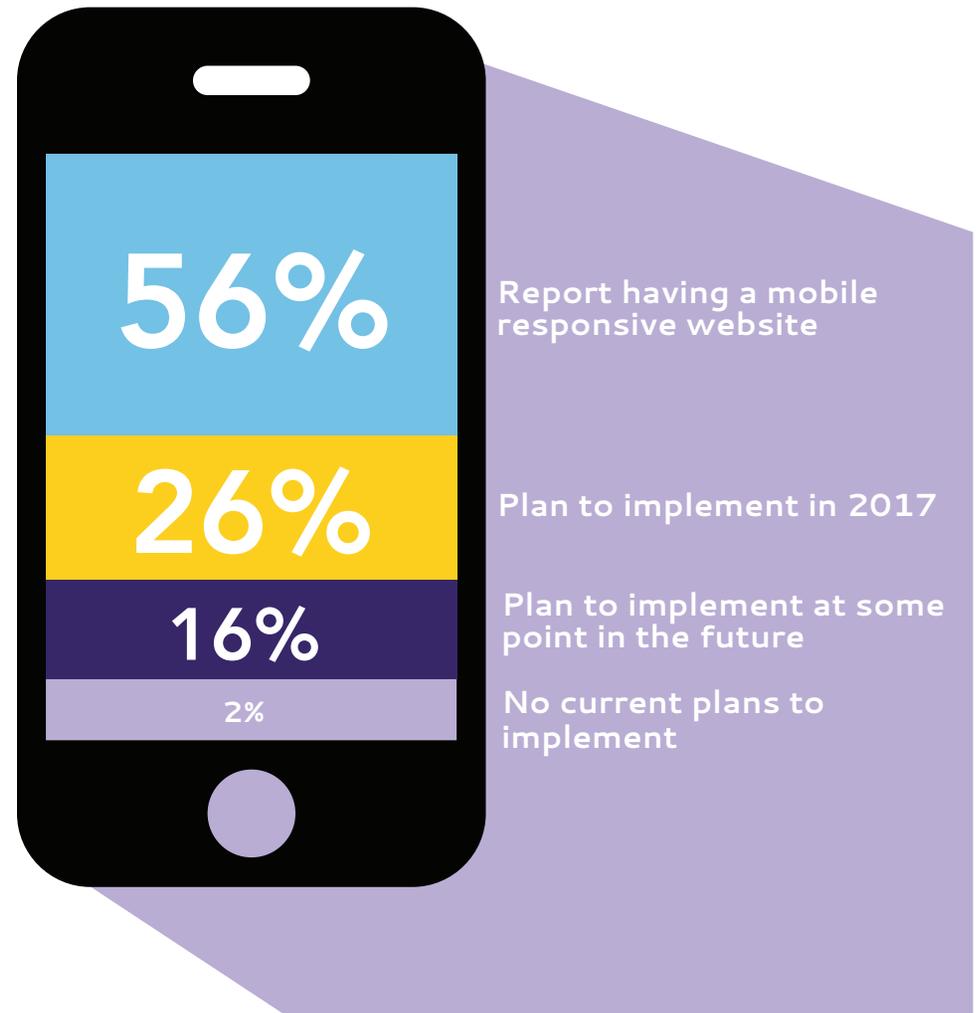
TRENDS

Recognizing that digital channels and tools allow local government agencies to better understand and engage citizens, survey respondents identified tools they currently use and plan to use in 2017 and beyond.

Not surprisingly, the deployment of mobile-ready web design, currently used in more than half (56%) of respondents websites, is expected to accelerate this year and into the future. Among respondents who do not currently have mobile-ready sites, virtually all plan on upgrading to responsive design in the future – 26 percent in 2017 and another 16 percent in the future.

When asked how they currently communicate with citizens, 90 percent of the local government respondents cite email as their primary tool, with social media a close second (86%) followed by eNotifications in third place (68%).

Mobile-ready Web Design



“ To communicate effectively with citizens, governments must reach them where they live. Right now, that’s Facebook. Tomorrow, it may be Snapchat or whatever else. We are relying on proprietary platforms to relay our messages, and those platforms are dictated by the market. It only makes sense to look at what’s next.

– **Communications Manager,
Washington** ”

Looking ahead, citizen engagement is the area in which respondents see the need for greatest investment and growth.

Despite increasing interest in blogging, local government communicators in this survey have not yet embraced this tool for sharing news and increasing transparency. Nearly 80 percent of respondents reported that their agencies do not currently blog.



EFFECTIVE INFORMATION DELIVERY

When asked to rank the topics they believe their citizens care about most, survey respondents said:

Job Opportunities



Emergency Notifications



Parks and Recreation

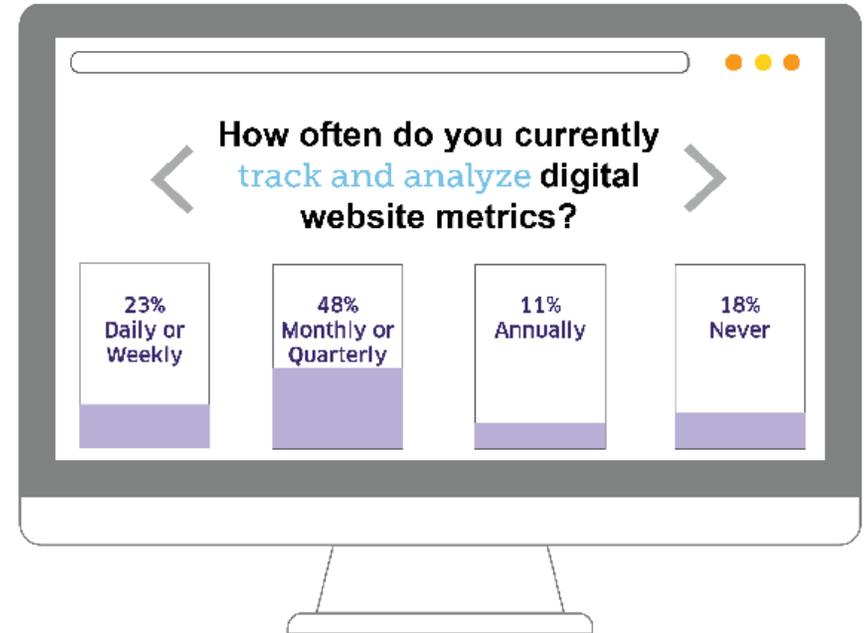


Comparing respondents' perceptions of how effective their agency's channels of citizen communications were at the end of 2016 to what they think it will be in 2021 reveals an interesting shift. At the end of 2016, the top 5 "highly effective" rankings were: social media (43%), email (41%), press releases (28%), agency websites (26%) and SMS/Text Messages (14%).

But respondents predict a dynamic shift by 2021, with agency websites topping the "highly effective" ranking (73%), followed by social media (70%), email (52%), engagement platforms (47%) and SMS/Text (45%).

ANALYTICS & UPDATES

The majority (71%) of 2017 survey respondents track and analyze their website metrics, including identifying their most visited web pages, at a minimum of once per quarter. Nearly a quarter (23%) of respondents analyze website traffic daily or weekly. When asked if they adjust their web strategy and update their homepage based on those analytics, 63 percent said “yes”, and another 25 percent said “sometimes.” As one respondent explained:



“The answer should be “Yes” but based on conflicting priorities and being responsible for more jobs and having less resources, I do not do this as frequently or as much as I should.

– IT Project Manager, Arizona”

CHALLENGES

Overall, this year's survey reveals that many local government leaders continue to grapple with internal and external challenges that prevent them from being as effective and transparent as today's technology allows. Comments that described various issues included:

“ Departments not maintaining their pages and adding new content without any strategic thought about goals, audiences and how to tailor that content to fit the audience.

– **Public Information Officer, Washington** ”

“ The website appears to a viewer to be outdated, as if not given much attention by the community. This can cause outside investors looking at the community to become dissatisfied with the community appearance.

– **Community Development Director, Oklahoma** ”

“ Security is a huge concern, and I'd rank that first. Open-source software doesn't cut it anymore. We might as well have a huge target on our foreheads. If we do not keep up with the rapid pace of updates, we become vulnerable. Proprietary software will vastly improve our security profile.

– **Communications Manager, Washington** ”

SUMMARY

The relationship between citizens and government is continually evolving. Over the past three years of surveys, the shift from an internal staff focus to one centered on the citizen experience has been dramatic. It's clear that local government leaders recognize their responsibility to provide citizens with digital services with the same level of accessibility, transparency and efficiency they enjoy in the private sector.

Engagement takes many forms – voice-to-voice, face-to-face, mobile and social. It's up to local leaders to make sure that messages are consistent across all platforms.

Moreover, local leaders will need to place greater emphasis on State and Federal requirements for digital communications, like the new rules for website accessibility. In many cases, failure to comply with these regulations will result in costly lawsuits.

And with cybersecurity concerns also rising, it's also up to local government leaders to stay current on the potential risks and threats and to review disaster recovery plans.

The challenges are great but the opportunities to increase satisfaction, build trust and foster engagement on the local level are greater than ever.

“

As local government, our duty is to serve the public; and part of the equation to engaging the public is through new technology.

– **City Administrator, Texas**

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ABOUT VISION

Headquartered in El Segundo, Calif., Vision 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 2017, Vision was named for the second consecutive year 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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