E-Government Benchmark Survey

October 2017
Research purpose

Gauge residents’ use of and attitude towards the online delivery of government services in Oregon.
Methodology

- Telephone survey conducted October 12 to 18, 2017
- N=1200 Oregon residents
  - Stratified sample: N=400 per region (Tri-County, Willamette Valley, Rest of State)
- Quotas by age, gender, and geographic area; weighted by area of the state
- Margin of error ±2.8%
- Results benchmarked against 2015 and 2013 surveys
Internet access and communications
Internet access in Oregon continues to increase. 97% have access either in the home or elsewhere.

Total Internet Access

- 94% in 2013
- 96% in 2015
- 97% in 2017

Access at home: 93%
Access outside home: 4%
No internet access: 3%

2017
Access is lower among people in rural areas, older people, and those with lower education levels.

<table>
<thead>
<tr>
<th>At home</th>
<th>Tri-County</th>
<th>Will. Valley</th>
<th>Rest of State</th>
<th>18-34</th>
<th>34-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>No access</td>
<td>96%</td>
<td>92%</td>
<td>91%</td>
<td>97%</td>
<td>96%</td>
<td>87%</td>
</tr>
<tr>
<td>Outside home</td>
<td>5%</td>
<td>6%</td>
<td>6%</td>
<td>10%</td>
<td>8%</td>
<td></td>
</tr>
</tbody>
</table>

| H.S. or less | 84% | Some college | 95% | 4-year degree | 97% |

DHM RESEARCH | OREGON E-GOV BENCHMARK SURVEY | OCTOBER 2017
Oregonians prefer to contact their state government via the phone, a website, or an email.

<table>
<thead>
<tr>
<th>Contact Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone call</td>
<td>31%</td>
</tr>
<tr>
<td>Visit a website</td>
<td>26%</td>
</tr>
<tr>
<td>Send an email</td>
<td>22%</td>
</tr>
<tr>
<td>Visit an office</td>
<td>7%</td>
</tr>
<tr>
<td>Write a letter</td>
<td>3%</td>
</tr>
</tbody>
</table>

Prefer a phone call:
- People 55+
- Less than a four-year degree
- Income of less than $75K

Prefer websites and email:
- Tri-county residents
- Young people 18-34
- Income of $75K or more
Preference for website contact decreased from 2015, while email increased.
Preference for phone calls has decreased consistently since 2013.
Online vs. traditional services
Convenience and speed are the top advantages of online government services over traditional services.

<table>
<thead>
<tr>
<th></th>
<th>Better than traditional</th>
<th>The same</th>
<th>Worse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience</td>
<td>72%</td>
<td>19%</td>
<td>7%</td>
</tr>
<tr>
<td>Speed</td>
<td>64%</td>
<td>26%</td>
<td>7%</td>
</tr>
<tr>
<td>Usefulness</td>
<td>57%</td>
<td>34%</td>
<td>7%</td>
</tr>
<tr>
<td>Cost</td>
<td>48%</td>
<td>43%</td>
<td>6%</td>
</tr>
</tbody>
</table>
A growing number of Oregonians feel that online services are more convenient and faster.

Online Viewed As Better Than Traditional

- Convenience: 69% in 2013, 55% in 2015, 72% in 2017
- Speed: 64% in 2017

DHM RESEARCH | OREGON E-GOV BENCHMARK SURVEY | OCTOBER 2017
Use of government websites
The most common reasons to visit a state site are looking for info, completing a transaction, and paying fees or taxes.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Look for information, data, or services</td>
<td>65%</td>
</tr>
<tr>
<td>Complete transaction such as reserving campsite or renewing car registration</td>
<td>49%</td>
</tr>
<tr>
<td>Pay fees or taxes</td>
<td>33%</td>
</tr>
<tr>
<td>Access health insurance information</td>
<td>26%</td>
</tr>
<tr>
<td>Access unemployment/welfare</td>
<td>21%</td>
</tr>
<tr>
<td>Apply for a job with the State</td>
<td>19%</td>
</tr>
<tr>
<td>Receive small business assistance</td>
<td>9%</td>
</tr>
<tr>
<td>Participate in a virtual public meeting</td>
<td>8%</td>
</tr>
</tbody>
</table>

*DHM RESEARCH | OREGON E-GOV BENCHMARK SURVEY | OCTOBER 2017*
More Oregonians are accessing state sites for the three most common purposes:

- **Look for information/services**
  - 2013: 59%
  - 2015: 60%
  - 2017: 65%

- **Complete a transaction**
  - 2013: 40%
  - 2015: 43%
  - 2017: 49%

- **Pay fees or taxes**
  - 2013: 24%
  - 2015: 26%
  - 2017: 33%
Oregon.gov has wide reach. Nine in ten have heard of it, and seven in ten of all Oregonians have visited.
Usage is high across the state, but people in rural areas are slightly less likely to have experience with Oregon.gov.
Usage is increasing.

- Visited in the past year:
  - 2013: 40%
  - 2015: 46%
  - 2017: 56%

- Visited Oregon.gov:
  - 2013: 55%
  - 2015: 59%
  - 2017: 70%
Strong majorities of those who have been to Oregon.gov say it is both useful and easy to use.

Residents 55 and older are less likely to say Oregon.gov is useful or easy to use.
Most residents who have been to the website in the past year say it has become more useful and easier to use.

- 53% has become more useful
- 53% has become easier to use
Searching for information
Most who have searched for information found what they were looking for. The proportion who didn’t increased slightly.

When searching for a state government service or information online…

- My search was successful
  - 2013: 78%
  - 2015: 79%
  - 2017: 74%

- Searched and was unable to find it
  - 2013: 22%
  - 2015: 21%
  - 2017: 26%
Fewer think it is easy to find contact information, though a strong majority are still satisfied.

How easy is it to find contact information for state agencies?

<table>
<thead>
<tr>
<th>Year</th>
<th>Very easy</th>
<th>Somewhat easy</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>13%</td>
<td>69%</td>
</tr>
<tr>
<td>2015</td>
<td>22%</td>
<td>57%</td>
</tr>
<tr>
<td>2017</td>
<td>15%</td>
<td>58%</td>
</tr>
</tbody>
</table>
Website redesign
Eight in ten agree with the way the State is redesigning its websites.
This level of support has been consistent since 2013.
Priorities for government websites
Oregonians want to see state websites optimized for mobile devices.
Being able to find information and provide input are top priorities. Social media is less important.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Very important</th>
<th>Somewhat important</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finding public information about state finances, payroll, and services</td>
<td>47%</td>
<td>32%</td>
<td>79%</td>
</tr>
<tr>
<td>Providing your opinion about a policy or planning issue online</td>
<td>42%</td>
<td>35%</td>
<td>77%</td>
</tr>
<tr>
<td>Virtual public meetings or town halls for residents to interact remotely</td>
<td>35%</td>
<td>41%</td>
<td>76%</td>
</tr>
<tr>
<td>Getting information or interacting with agencies through social media</td>
<td>18%</td>
<td>27%</td>
<td>45%</td>
</tr>
</tbody>
</table>
These features are increasingly important.

- Find public information: 79% (2017), 77% (2015), 76% (2013)
- Provide your opinion: 69% (2017), 63% (2015), 69% (2013)
- Virtual public meetings: 63% (2017), 69% (2015), 74% (2013)
- Social media capabilities: 42% (2013), 38% (2015), 45% (2017)
Communications
Most Oregonians say the state is doing a good job communicating about services available online.
Fewer residents have seen advertising about services than did in years past.

Have you seen any advertising about State services available online?

Where participants see ads:
- Television, radio (33%)
- Internet (21%)
- Mail, emails (10%)
- Billboards (9%)
- Social media (7%)
- Newspapers (6%)
Oregonians tend to be somewhat confident in the security of their information, though trust has decreased slightly.

How confident are you that your personal information is stored securely?

- Very: 9%
- Somewhat: 40%
- Not too: 25%
- Not at all: 20%

2015: 54%
2017: 49%
People overwhelmingly prioritize data security over improving services.
Key Takeaways
Key takeaways

The internet is becoming more central to Oregonians’ lives.
- More have an internet connection, and fewer want to conduct business over the phone.

Oregon.gov has a wide reach.
- Nine in ten residents have heard of it. Over half have visited in the last year.

Strong majorities of people who use Oregon.gov think it is both useful and easy to use.
- Over half think the site has gotten better on both of these metrics in the last year.
- However, more are having trouble searching for information they need.
- People who tend to struggle with the website are often older, lower-income, and may live in rural areas of the state.
Key takeaways II

Oregonians overwhelmingly approve of the website redesign.

Being able to find information and provide input are top needs for state websites.
- Being able to interact with government on social media is less important.
- Most residents want to see the website optimized for mobile devices.

Information security is a priority for Oregonians.
- Between improving security and improving services, people overwhelmingly choose security.
- In the context of major hacks in the news, confidence in information security decreased from 2015.