E-Government Benchmark Survey

October 2017

Research purpose

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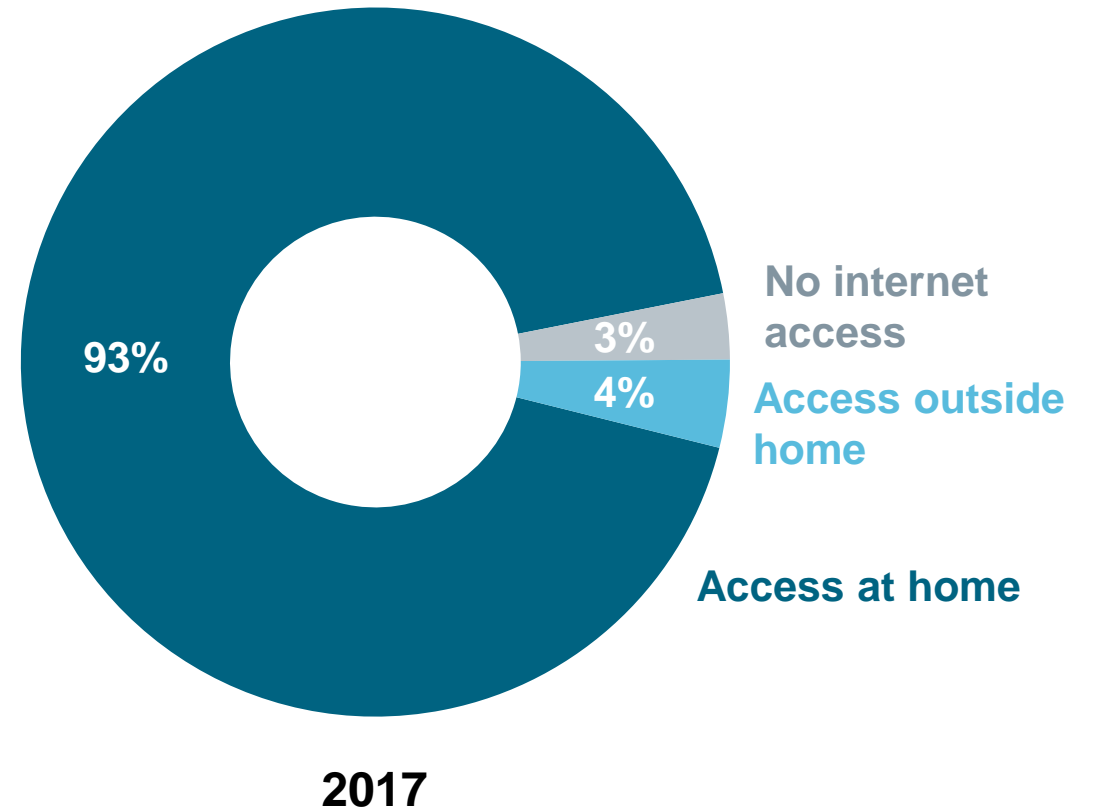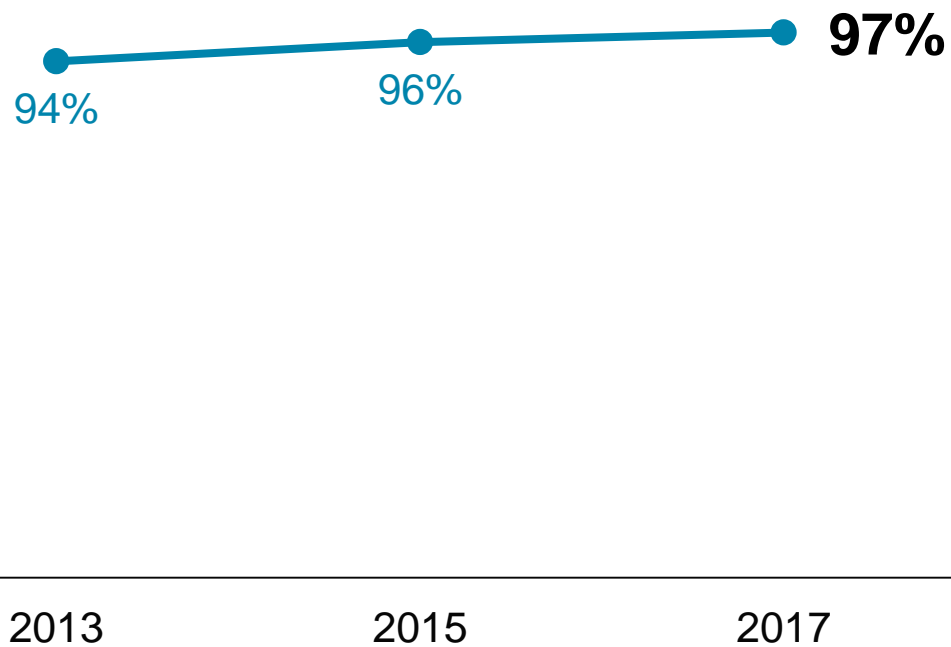
Methodology

- 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%

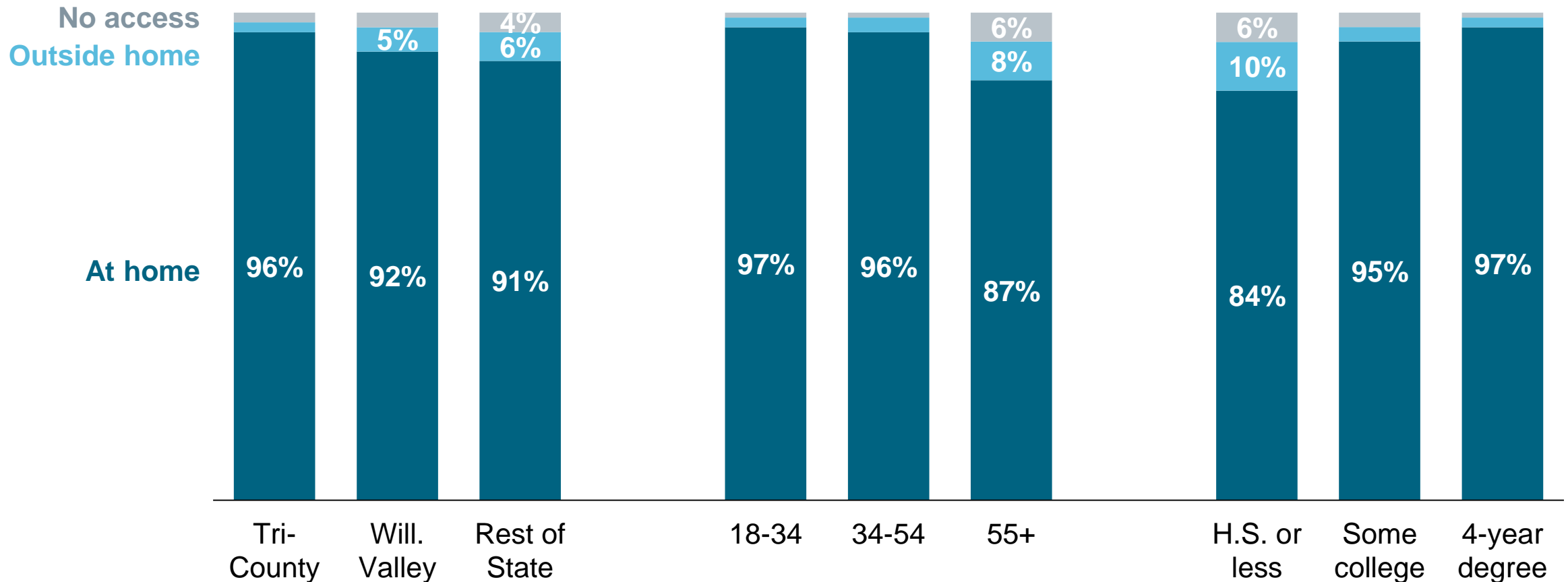- Results benchmarked against 2015 and 2013 surveys

Internet access and communications

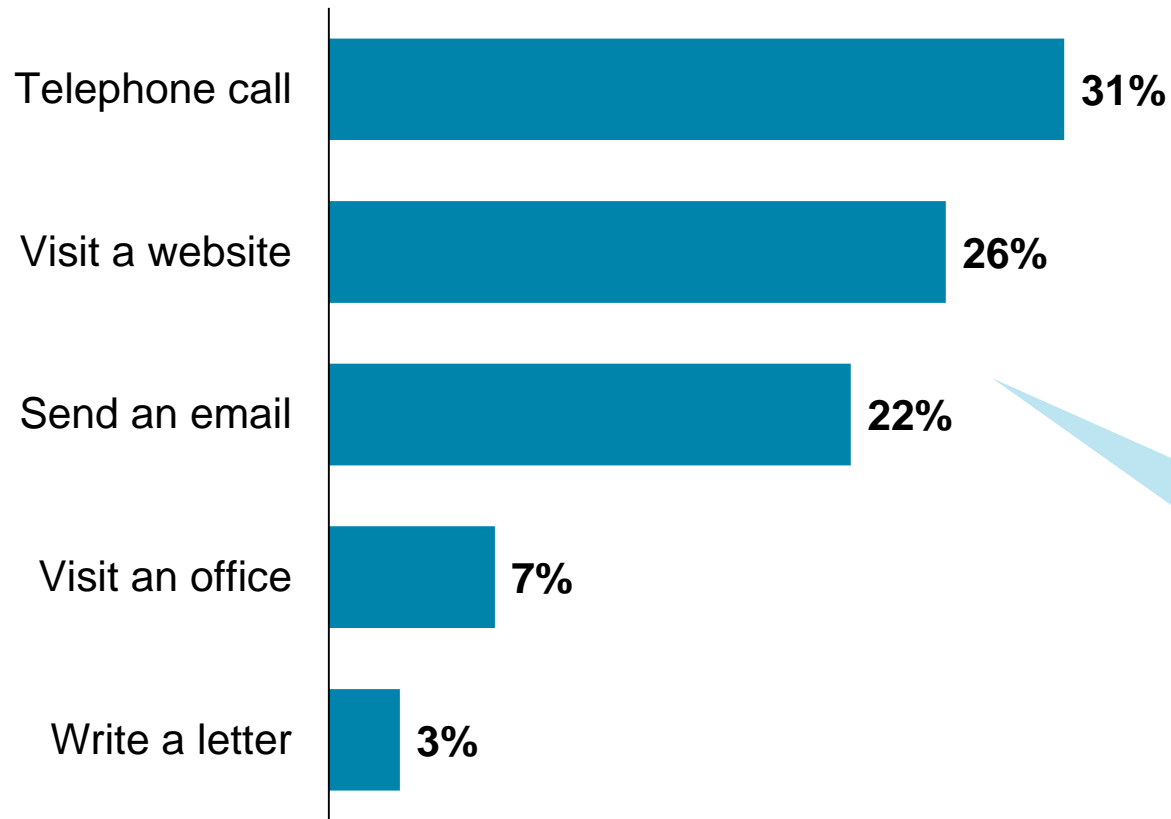# Internet access in Oregon continues to increase. 97% have access either in the home or elsewhere.

Total Internet Access

94% — 96% — **97%**

2013   2015   2017

93% — Access at home

3% — No internet access

4% — Access outside home

2017

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

No access
Outside home

At home

	Tri-County	Will. Valley	Rest of State	18-34	34-54	55+	H.S. or less	Some college	4-year degree
No access			4%			6%	6%		
Outside home		5%	6%			8%	10%		
At home	96%	92%	91%	97%	96%	87%	84%	95%	97%

Oregonians prefer to contact their state government via the phone, a website, or an email.

|	
Telephone call	31%
Visit a website	26%
Send an email	22%
Visit an office	7%
Write a letter	3%

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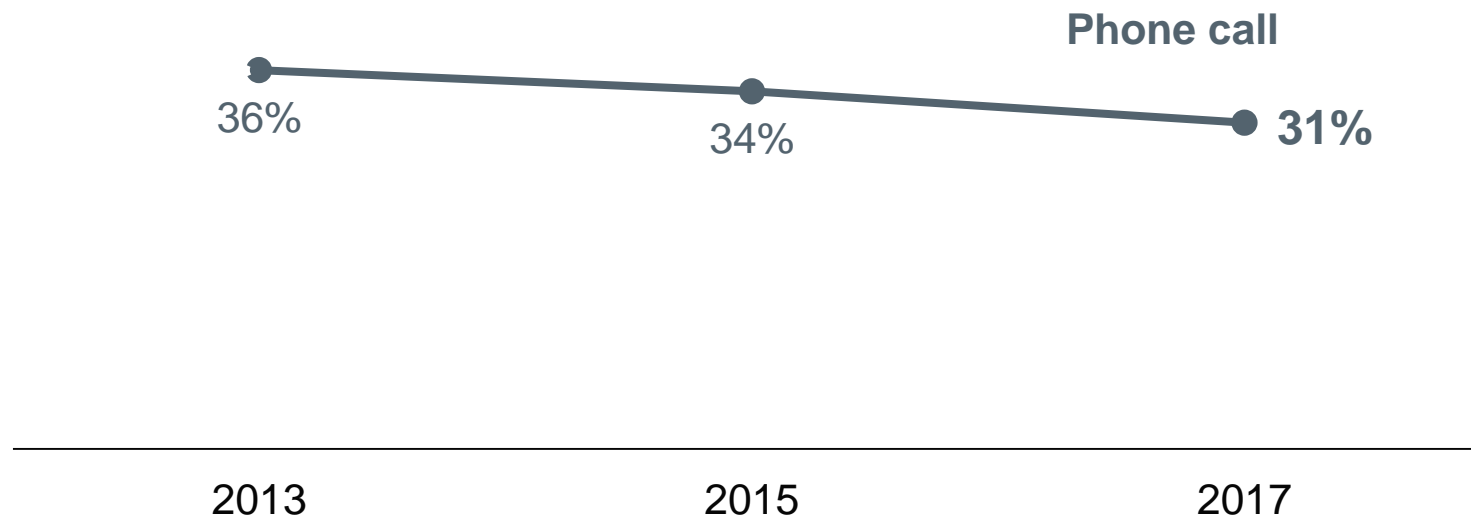- Income of less than $75K

Prefer websites and email:
- Tri-county residents
- Young people 18-34
- Income of $75K or more

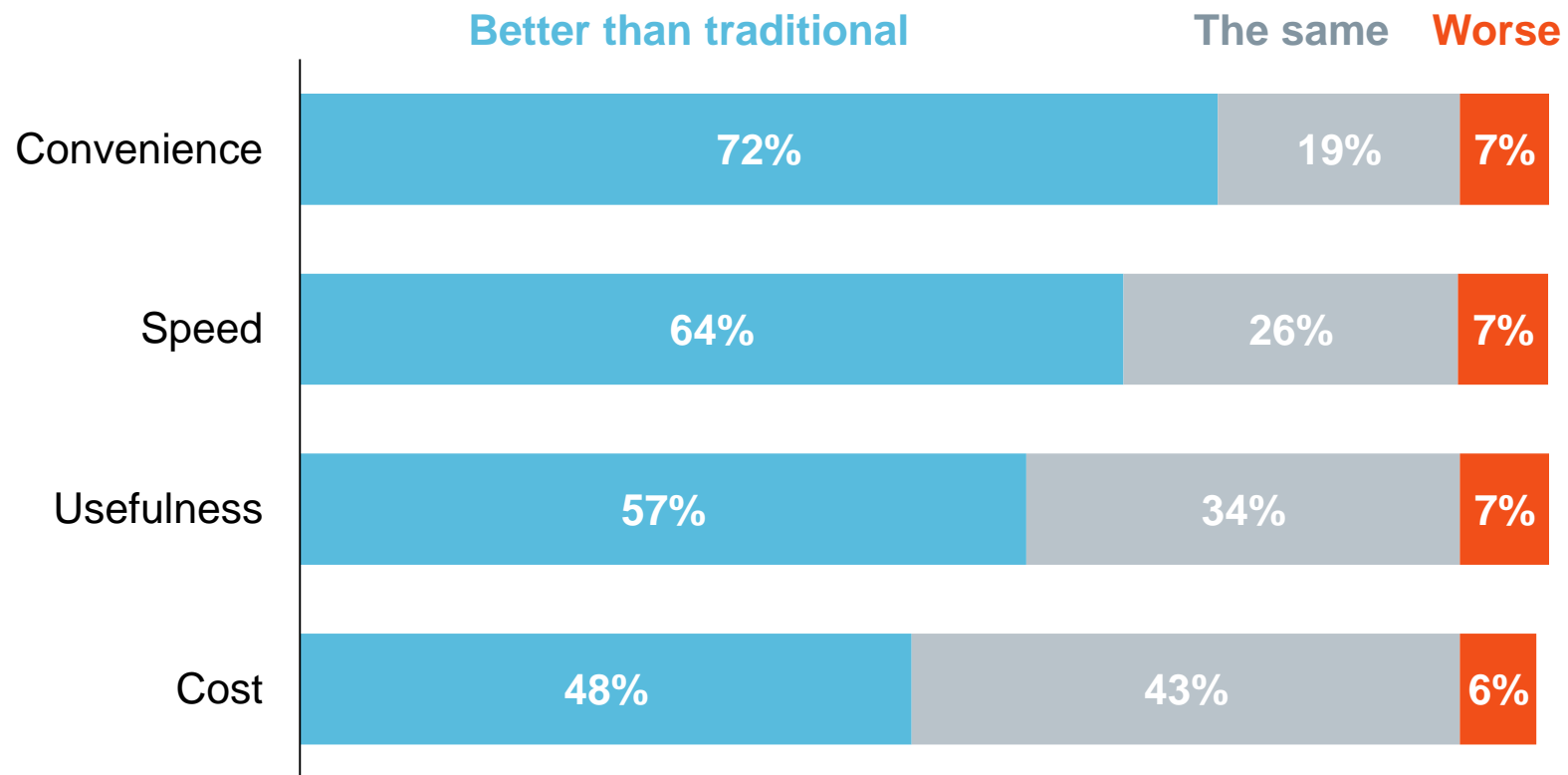# Preference for website contact decreased from 2015, while email increased.

43%

50%

48% **Total website + email**

29%

35%

26% Website

15%

14%

22% Email

2013

2015

2017
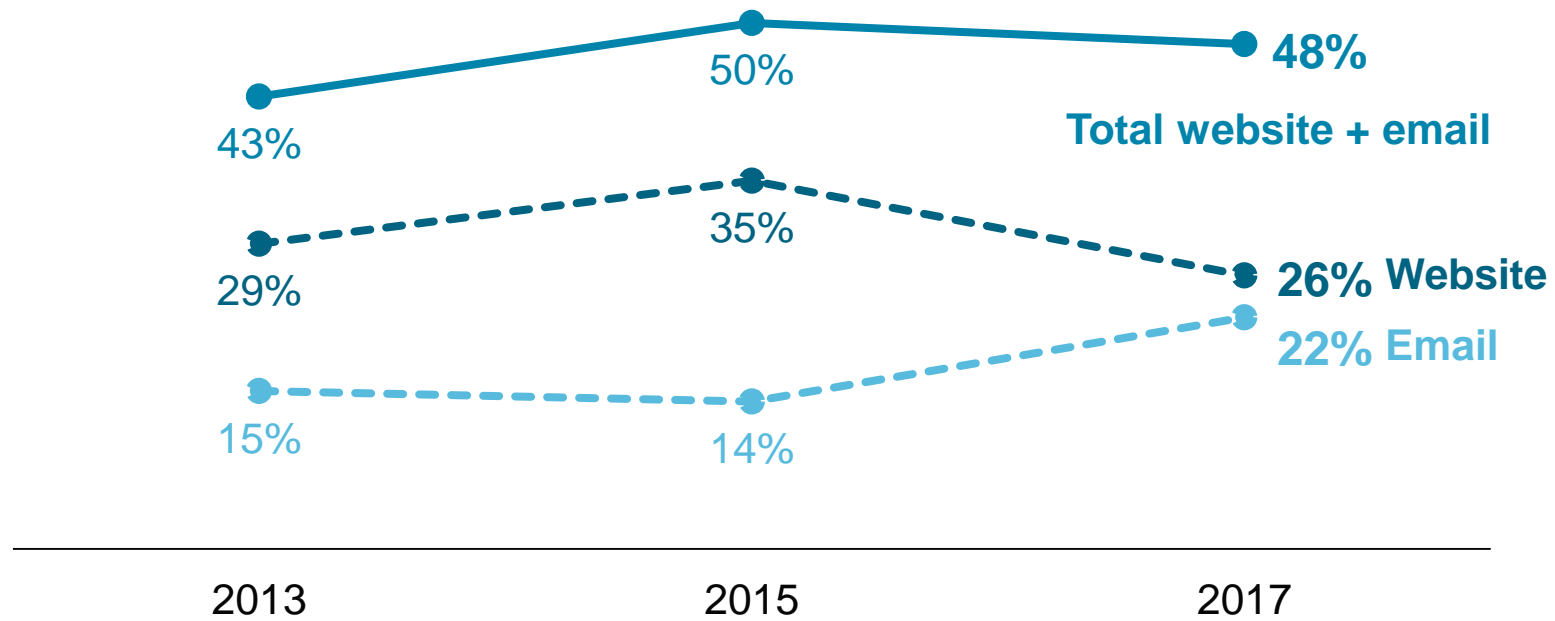
Preference for phone calls has decreased consistently since 2013.

Phone call

36%

34%

**31%**

2013   2015   2017

Online vs. traditional services

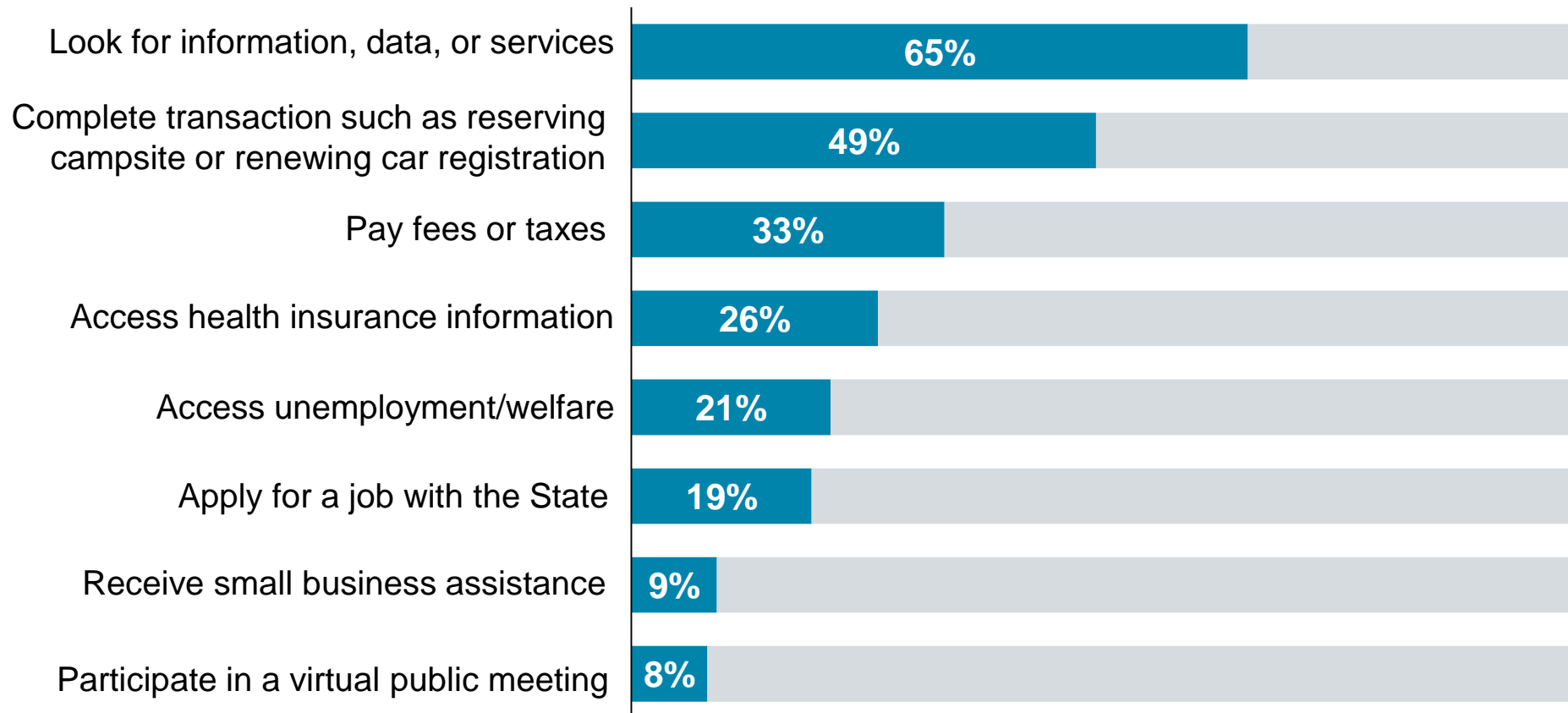# Convenience and speed are the top advantages of online government services over traditional services.

	Better than traditional	The same	Worse
Convenience	72%	19%	7%
Speed	64%	26%	7%
Usefulness	57%	34%	7%
Cost	48%	43%	6%

A growing number Oregonians feel that online services are more convenient and faster.

Online Viewed As Better Than Traditional

69%

55%

72% Convenience

64% Speed
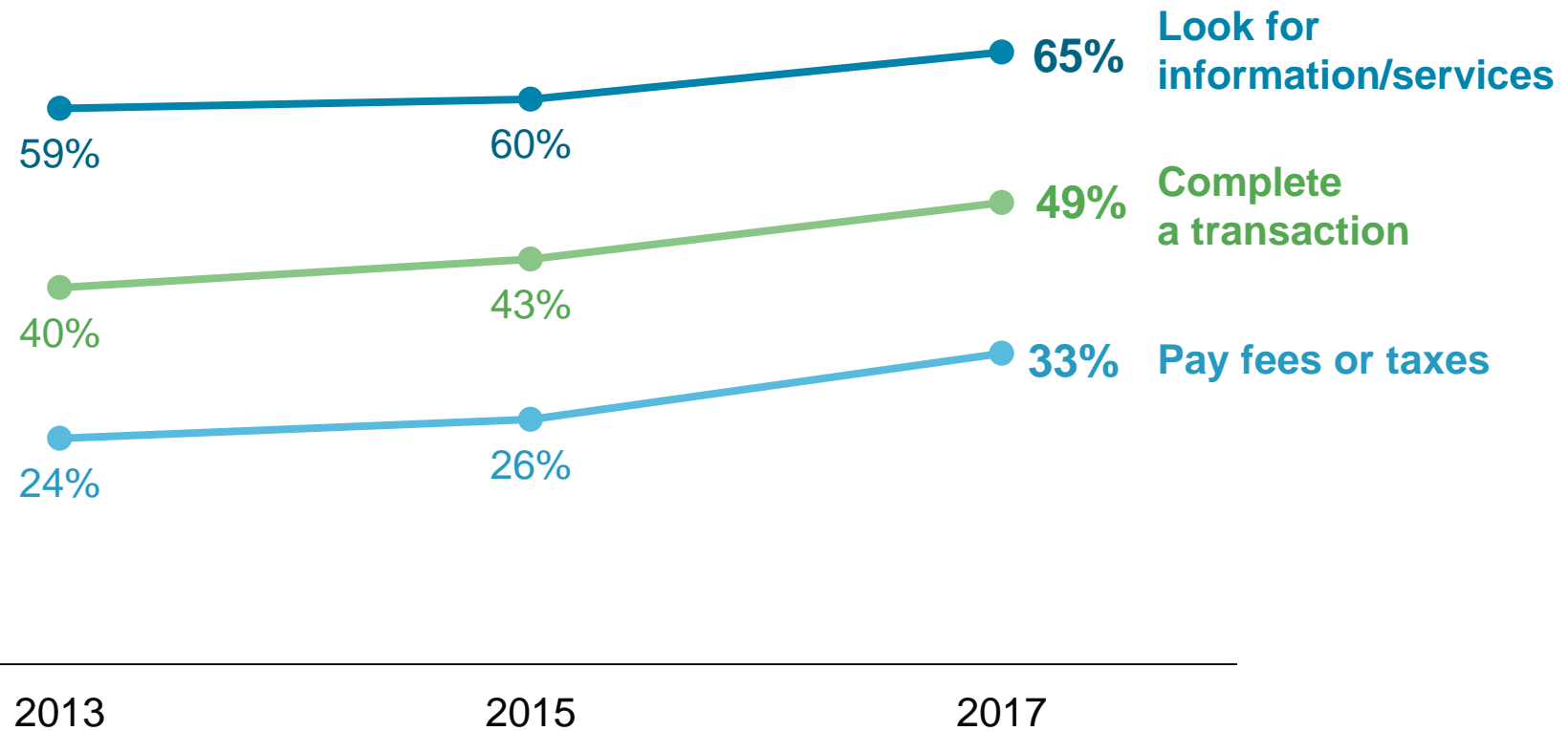
2013   2015   2017
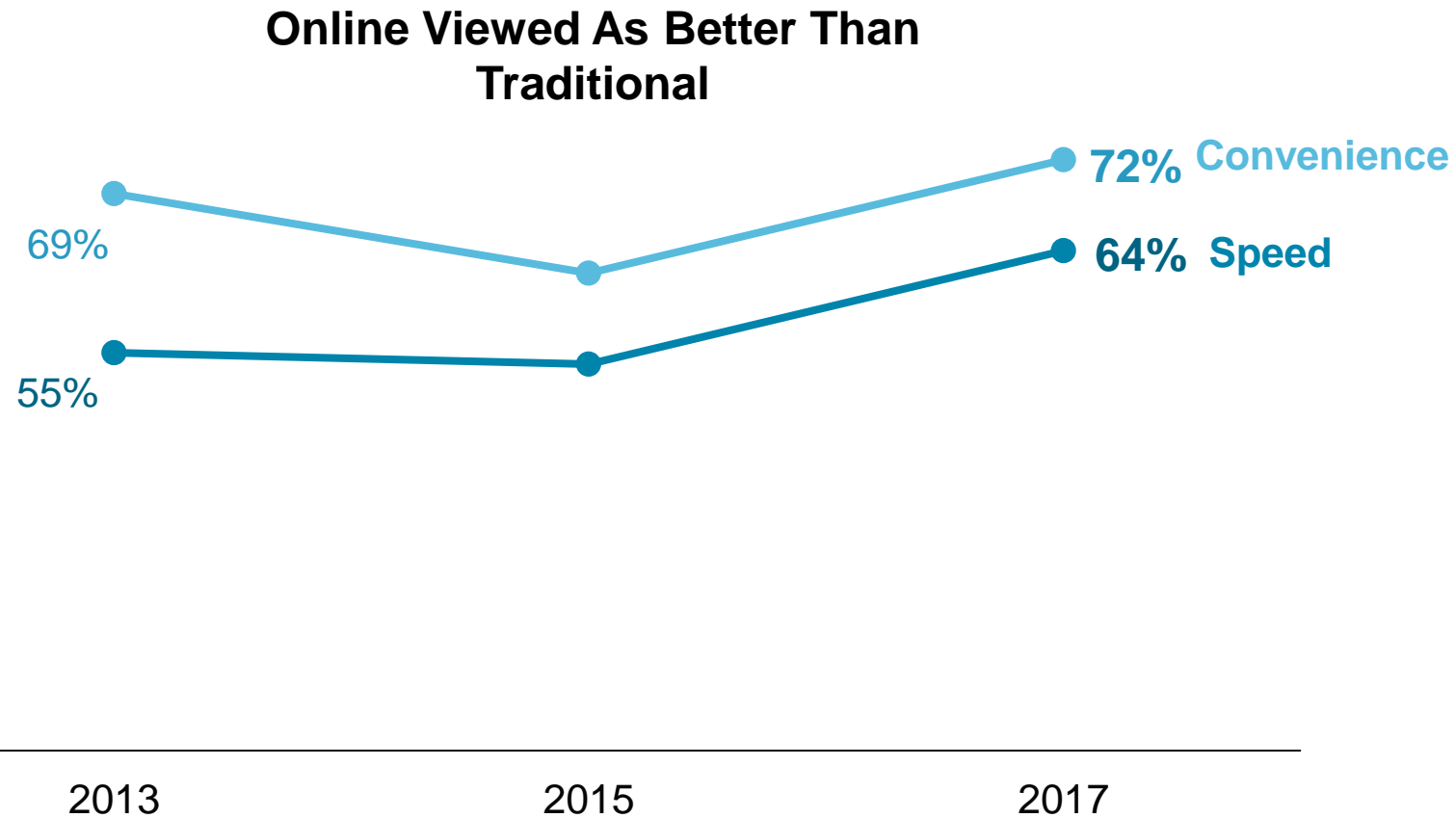
Use of government websites

The most common reasons to visit a state site are looking for info, completing a transaction, and paying fees or taxes.

Have you visited a State of Oregon agency website to…

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

More Oregonians are accessing state sites for the three most common purposes:

65% Look for information/services

59%   60%

49% Complete a transaction

40%   43%

33% Pay fees or taxes

24%   26%

2013   2015   2017
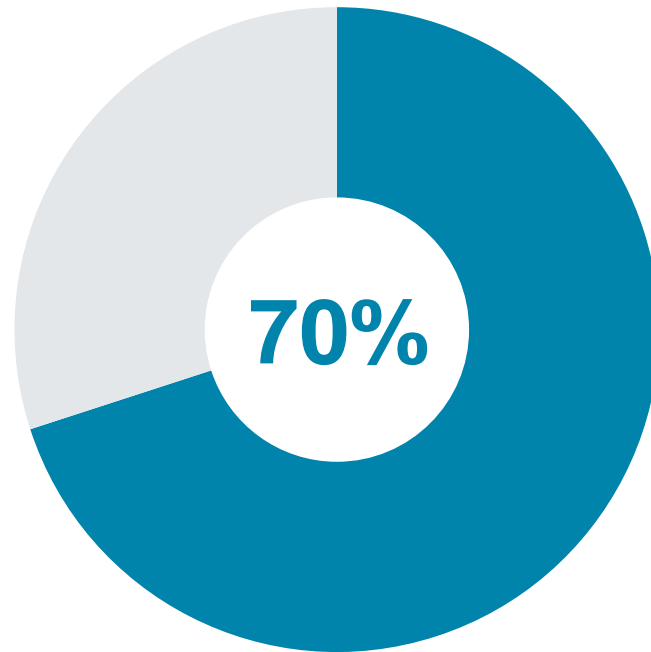
Oregon.gov

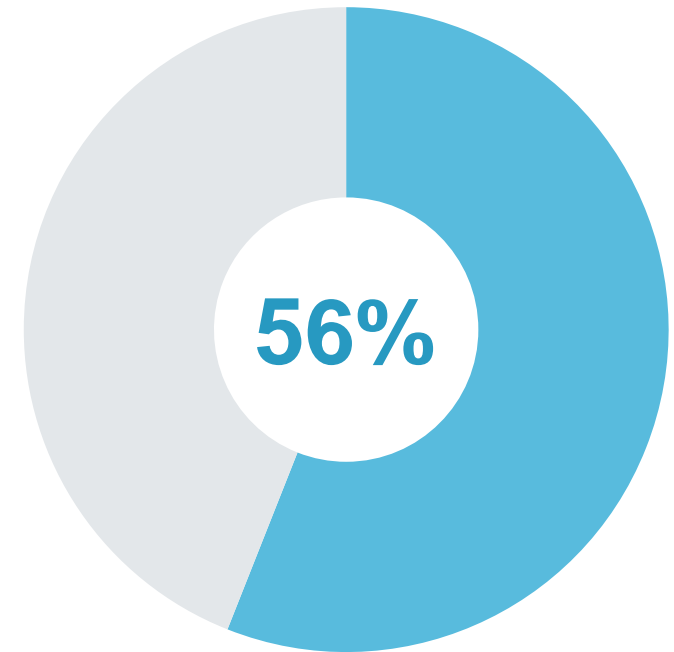# Oregon.gov has wide reach. Nine in ten have heard of it, and seven in ten of all Oregonians have visited.
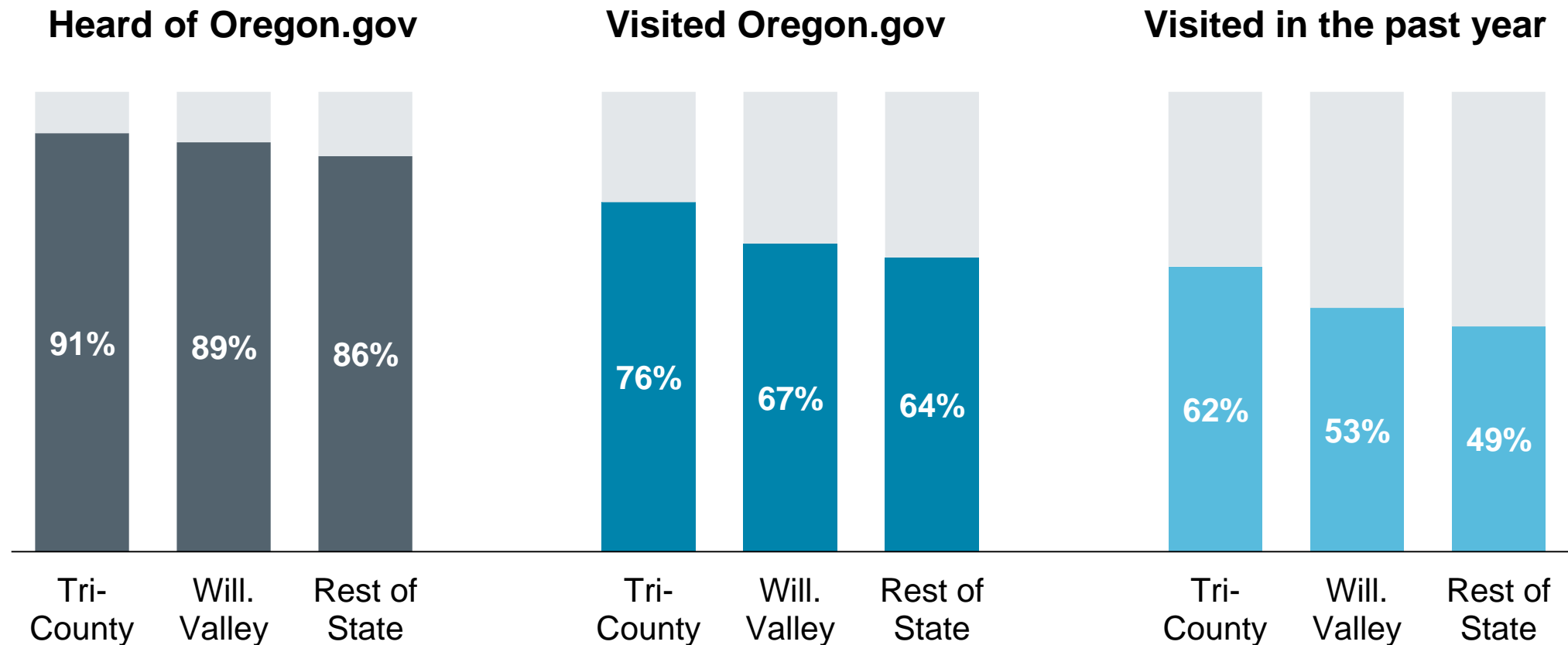
Heard of Oregon.gov

89%

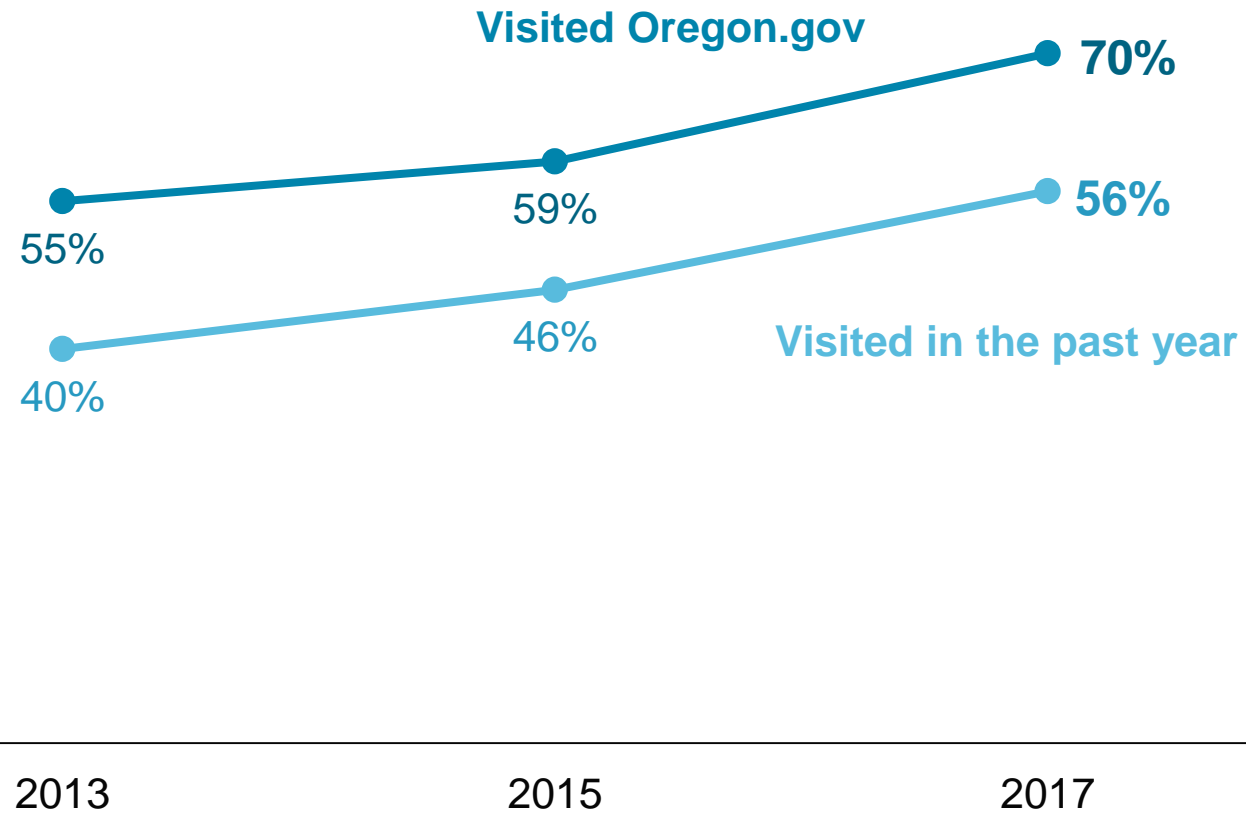**Visited Oregon.gov**

70%

Visited in the past year

56%
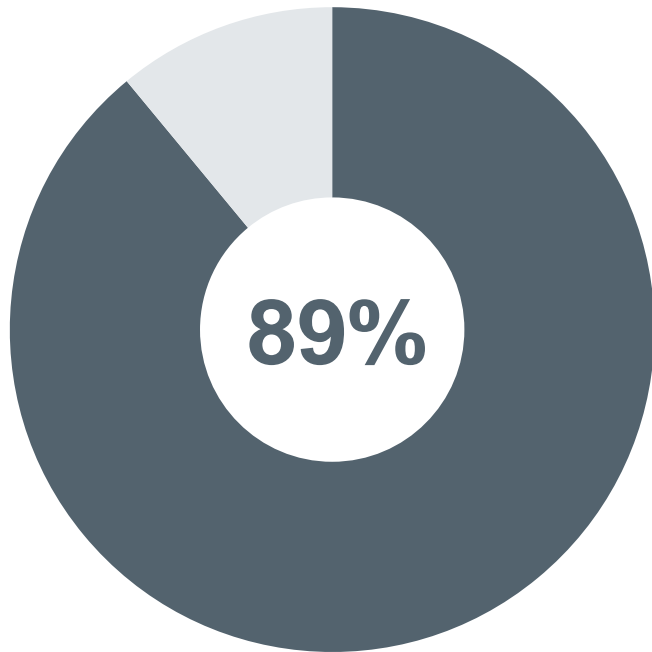
# Usage is high across the state, but people in rural areas are slightly less likely to have experience with Oregon.gov.

Heard of Oregon.gov

Tri-County: 91%
Will. Valley: 89%
Rest of State: 86%

Visited Oregon.gov

Tri-County: 76%
Will. Valley: 67%
Rest of State: 64%

Visited in the past year

Tri-County: 62%
Will. Valley: 53%
Rest of State: 49%

Usage is increasing.

Visited Oregon.gov

70%

59%

55%

56%

46%

Visited in the past year

40%

2013 2015 2017

Strong majorities of those who have been to Oregon.gov say it is both useful and easy to use.

How useful?

How easy to use?

89%

79%

Somewhat — 59%

Very — 29%

62%

18%
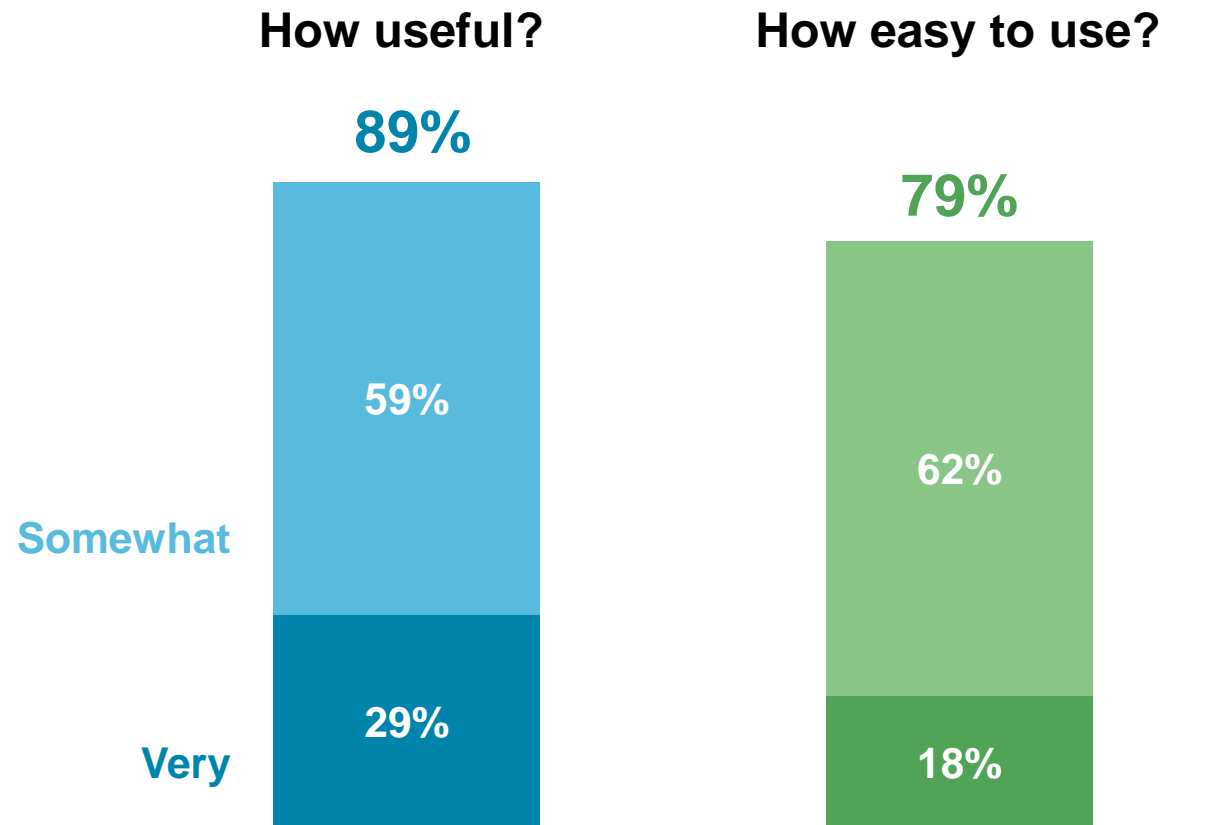
Residents **55 and older** are less likely to say Oregon.gov is **useful** or **easy to use**

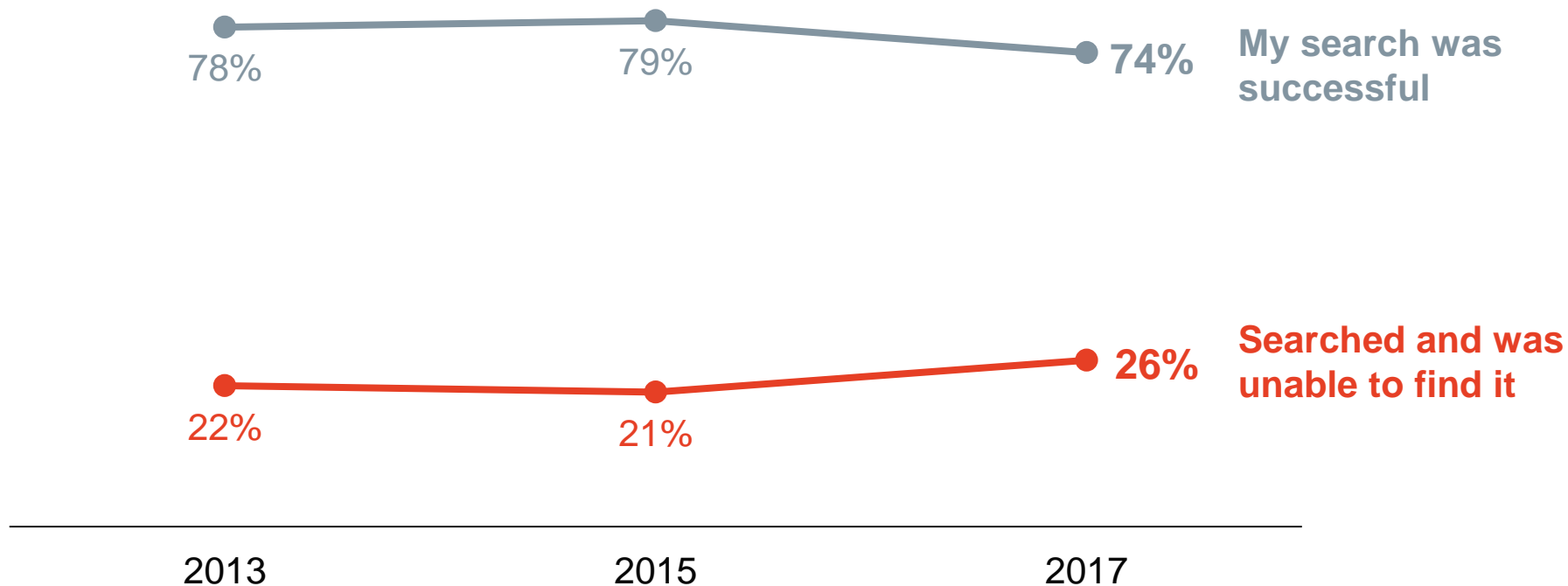# Most residents who have been to the website in the past year say it has become more useful and easier to use.

Has become more useful

53%

Has become easier to use
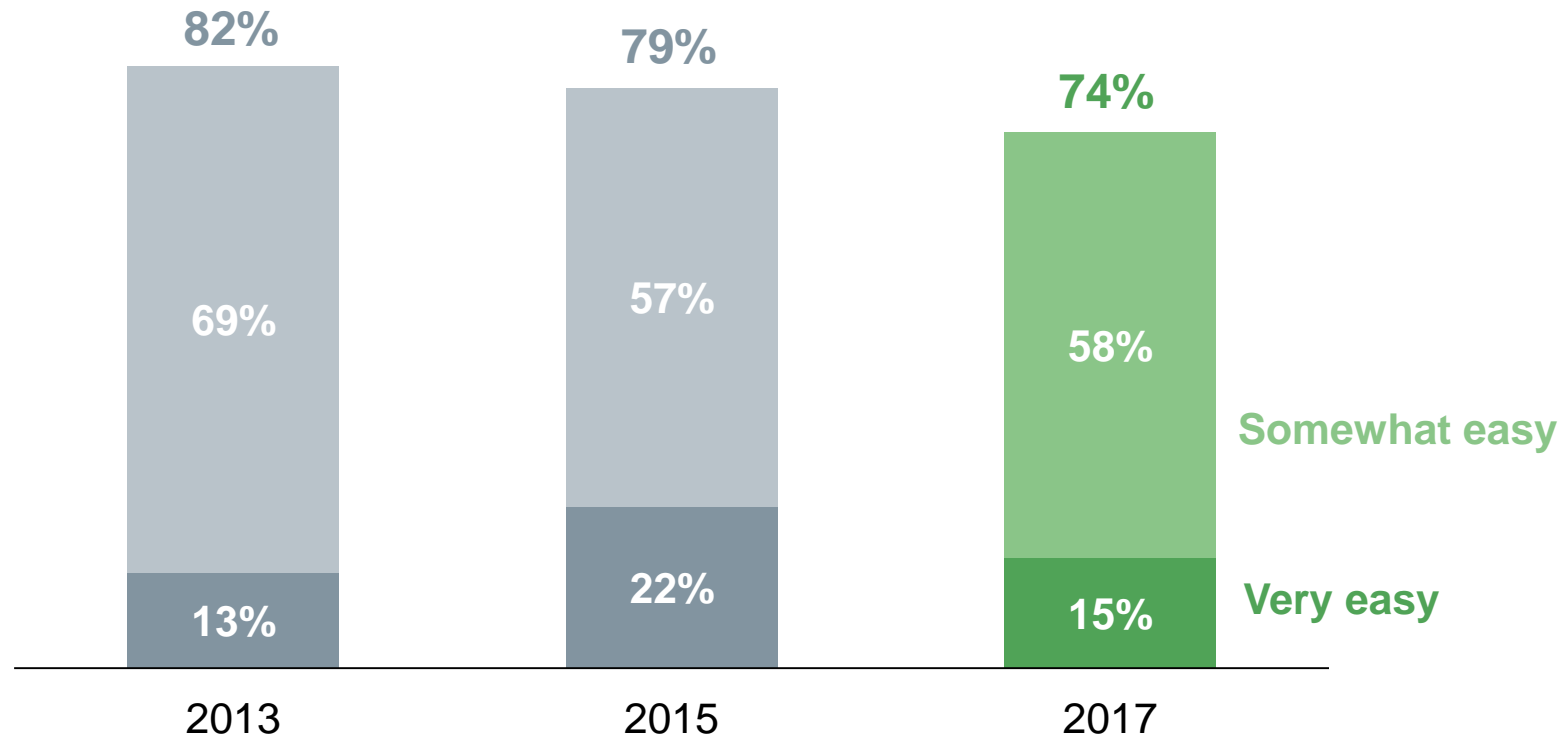
53%
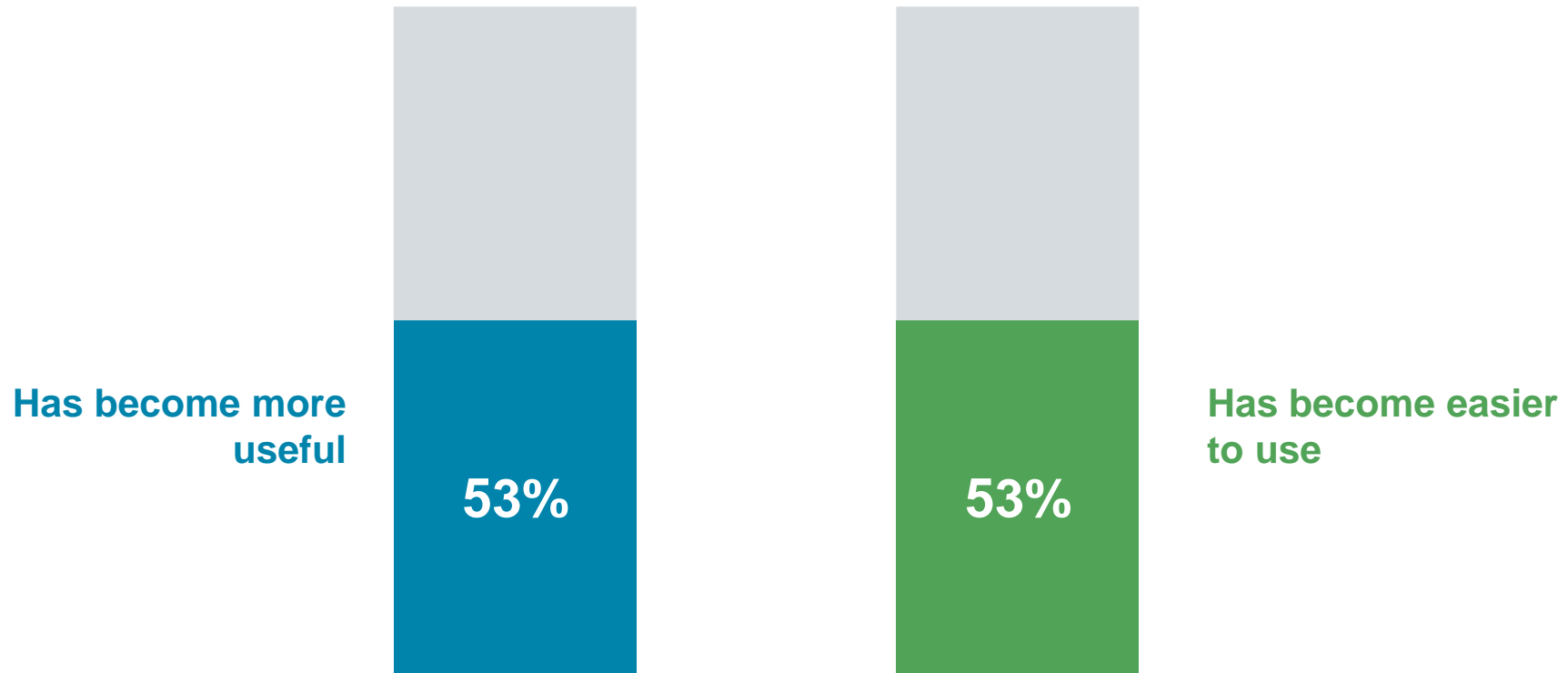
Searching for information

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…

78% 79% **74%** **My search was successful**

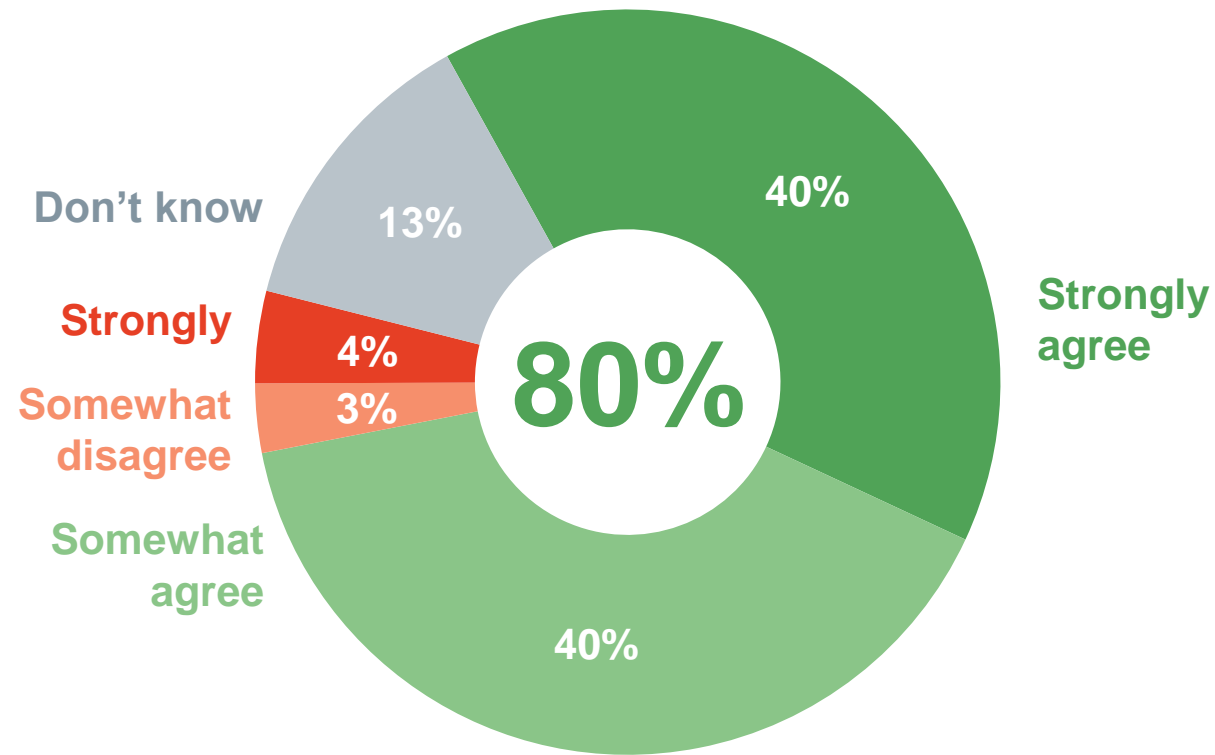22% 21% **26%** **Searched and was unable to find it**

2013   2015   2017

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?

82%

79%

74%

69%

57%

58% **Somewhat easy**

13%

22%

15% **Very easy**

2013

2015

2017

Website redesign

Eight in ten agree with the way the State is redesigning its websites.

Don't know **13%**

Strongly **4%**

Somewhat disagree **3%**

Somewhat agree **40%**

80%

Strongly agree **40%**

This level of support has been consistent since 2013.

2013: 7%, 45%, 34%
2015: 6%, 39%, 42%
2017: 7% Disagree, 40% Somewhat agree, 40% Strongly agree
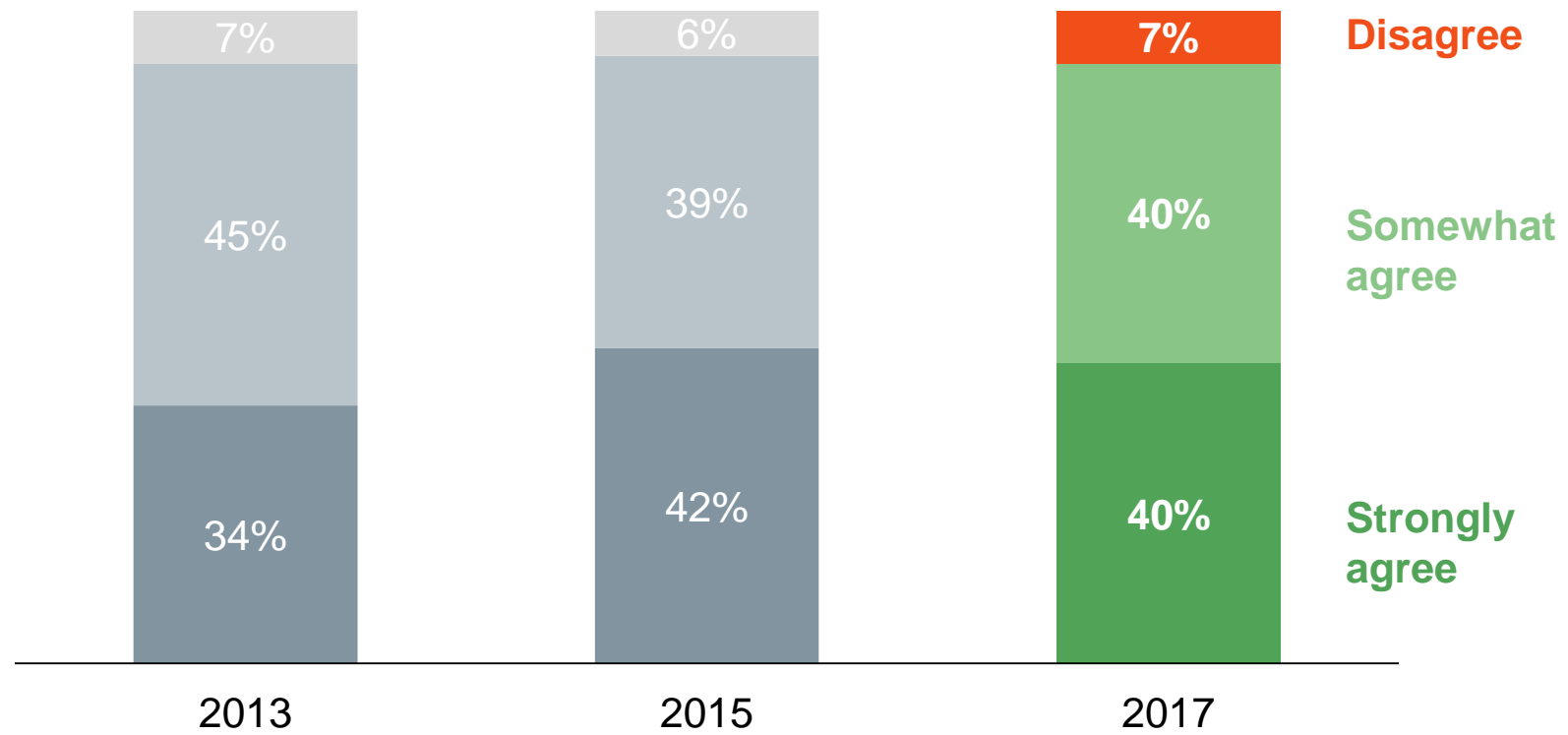
Priorities for government websites

Oregonians want to see state websites optimized for mobile devices.

65%

30%

35%

2013

71%

27%

44%

2015

75%

Somewhat important

26%

Very important

49%

2017
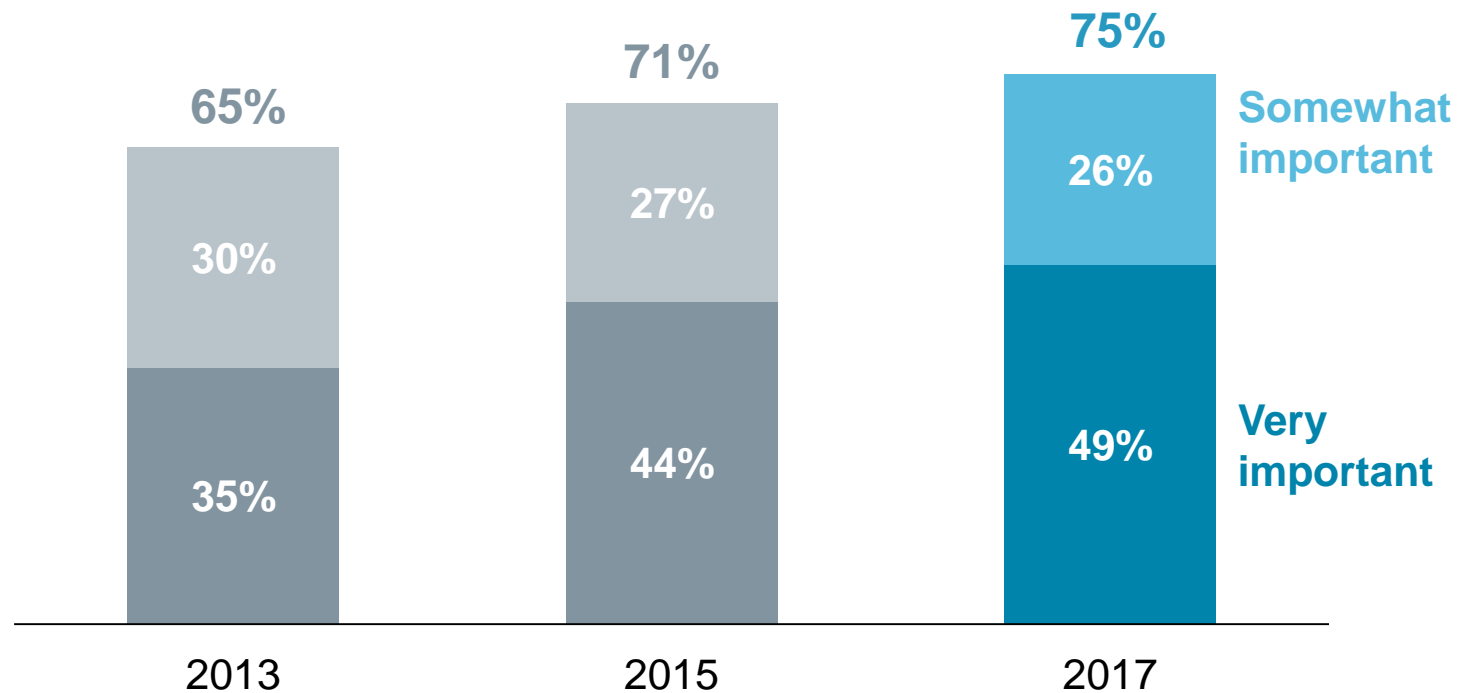
Being able to find information and provide input are top priorities. Social media is less important.

Very important **Somewhat important**

Finding public information about state finances, payroll, and services
| 47% | 32% | **79%** |

Providing your opinion about a policy or planning issue online
| 42% | 35% | **77%** |

Virtual public meetings or town halls for residents to interact remotely
| 35% | 41% | **76%** |

Getting information or interacting with agencies through social media
| 18% | 27% | **45%** |
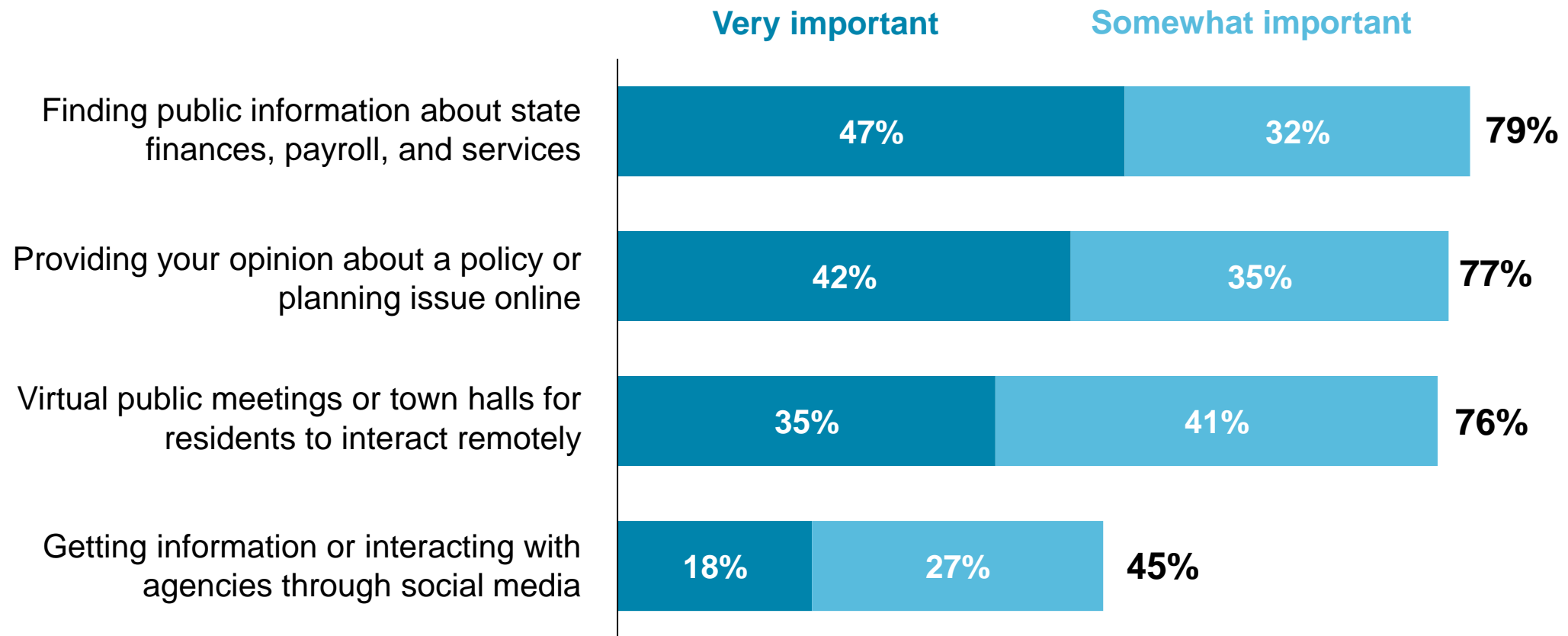
These features are increasingly important.

79% **Find public information**
77% **Provide your opinion**
76% **Virtual public meetings**

45% **Social media capabilities**

74%
69%
69%
63%
42%
38%

2013   2015   2017
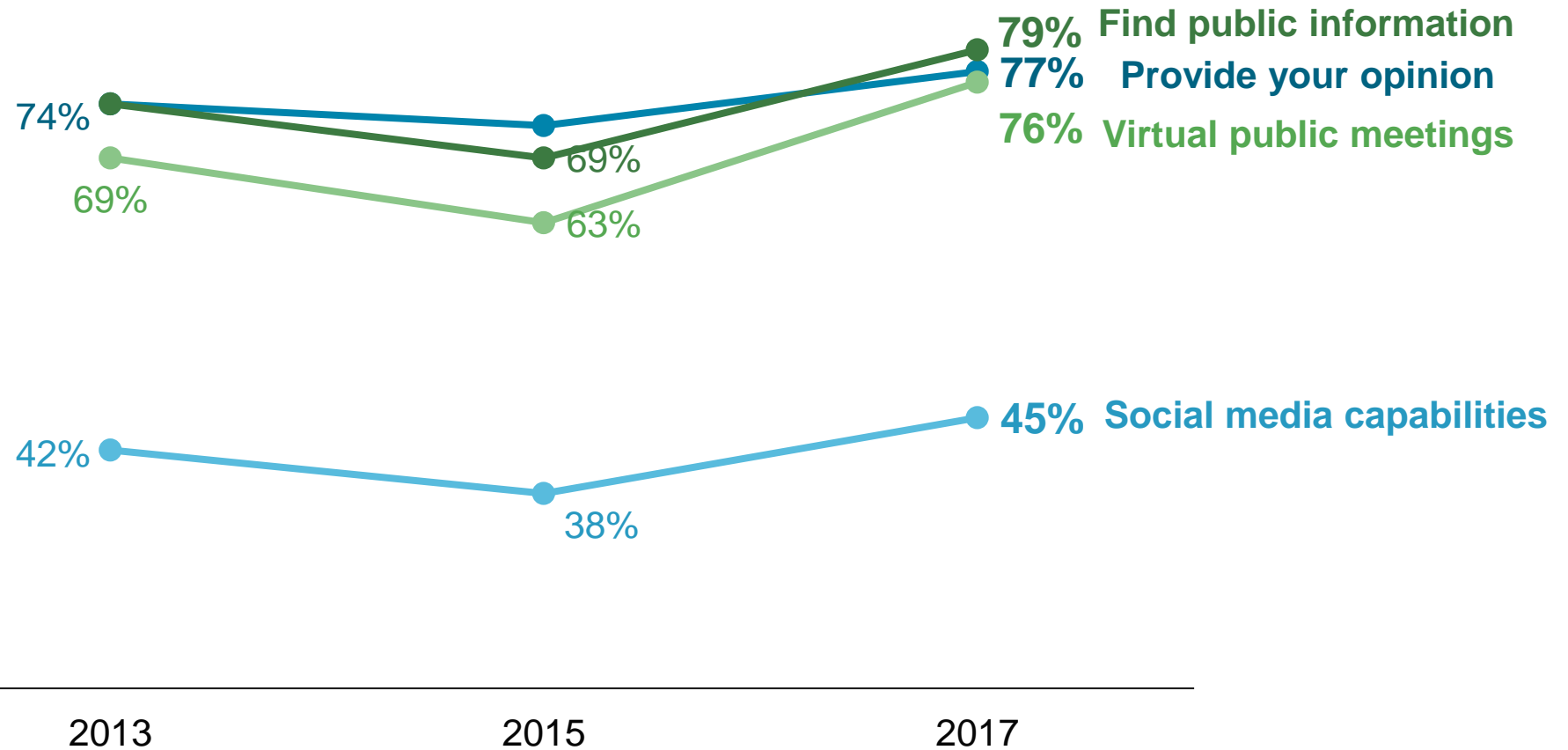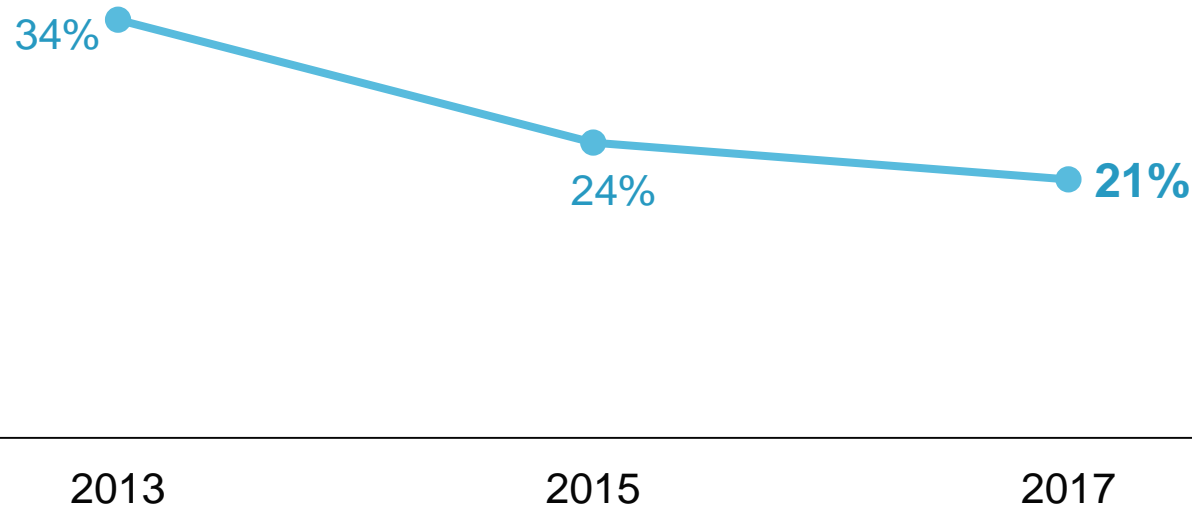
Communications

Most Oregonians say the state is doing a good job communicating about services available online.

	2013	2015	2017
Total	54%	52%	56%
Good job	46%	46%	46%
Very good job	8%	6%	10%
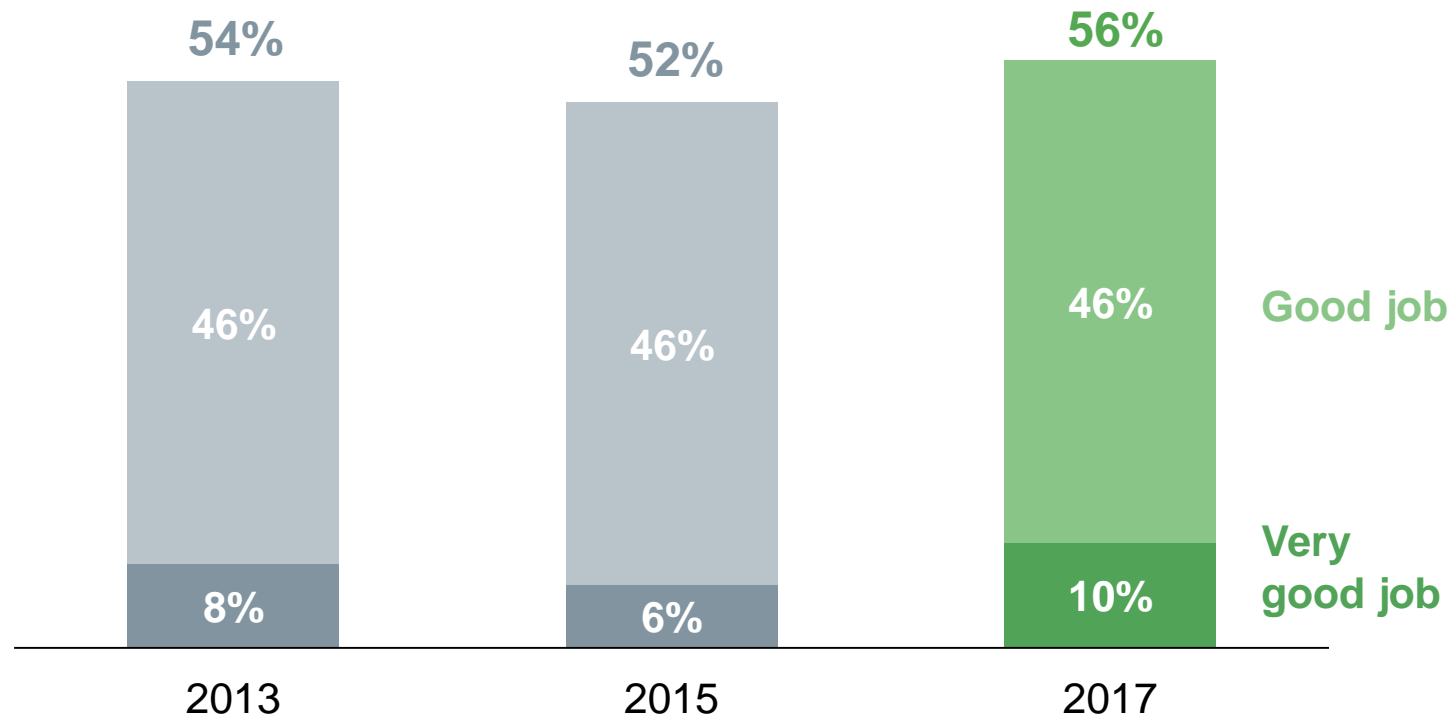
Fewer residents have seen advertising about services than did in years past.

Have you seen any advertising about State services available online?

34%

24%

21%

Where participants see ads:
- Television, radio (33%)
- Internet (21%)
- Mail, emails (10%)
- Billboards (9%)
- Social media (7%)
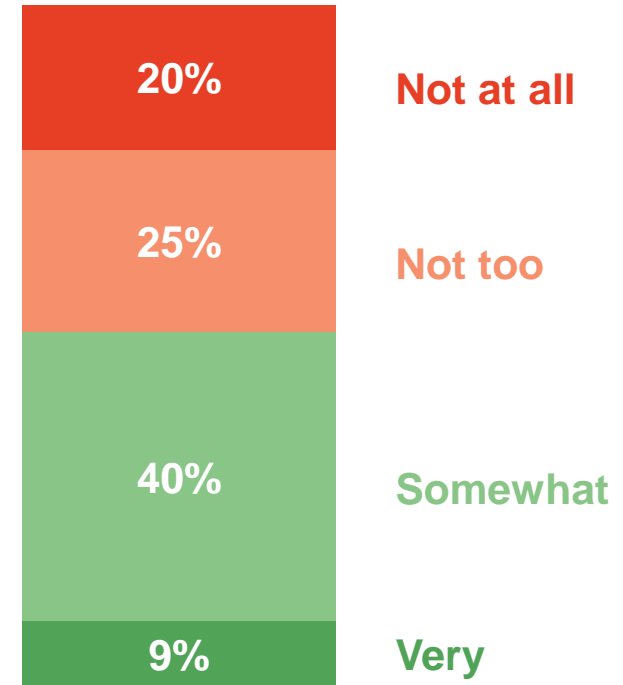- Newspapers (6%)

2013

2015

2017

Oregonians tend to be somewhat confident in the security of their information, though trust has decreased slightly.

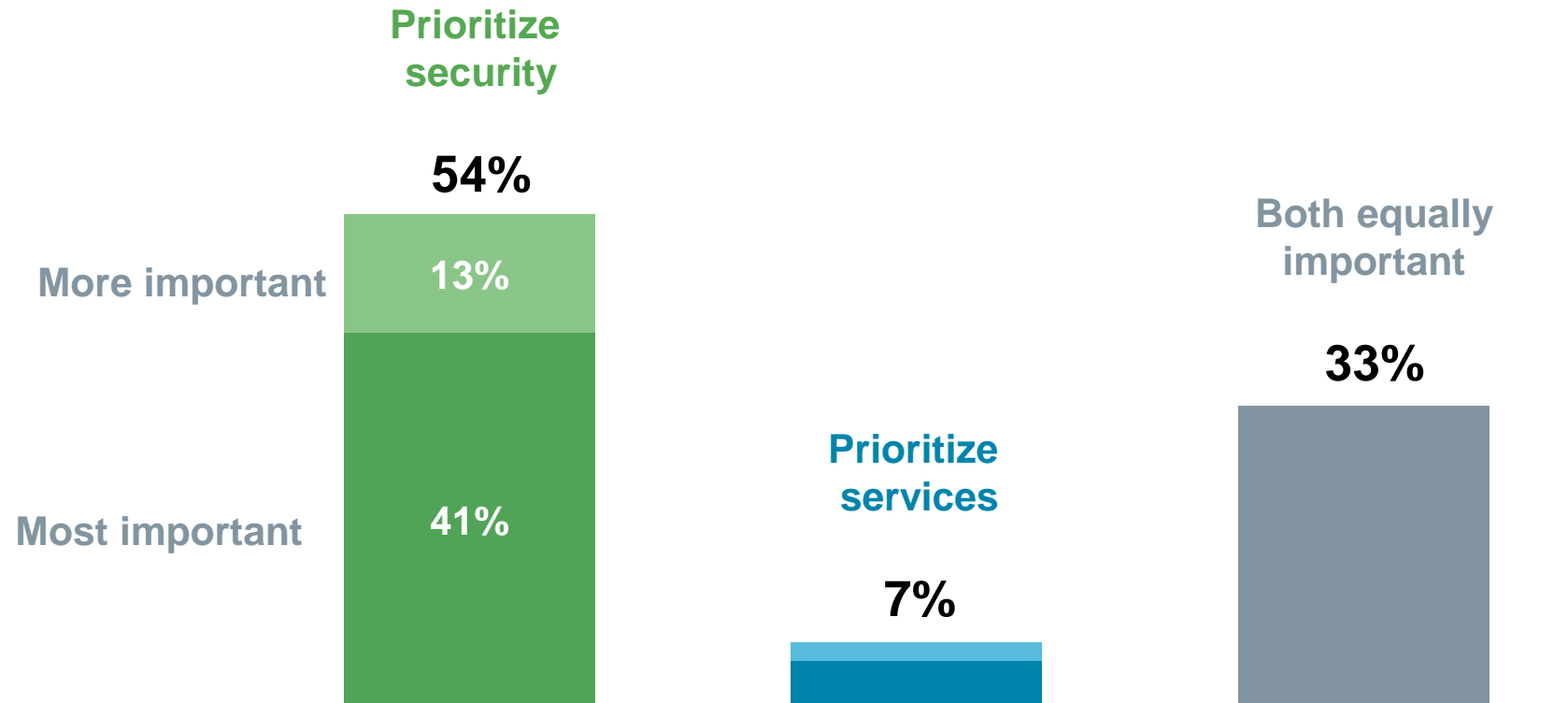*How confident are you that your personal information is stored securely?*

54%

49%

2015   2017

20%	**Not at all**
25%	**Not too**
40%	Somewhat
9%	**Very**

People overwhelmingly prioritize data security over improving services.

Prioritize security

54%

More important — **13%**

Most important — **41%**

Prioritize services

7%

Both equally important

33%

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.

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