dhm RESEARCH
DAVIS, HIBBITTS & MIDGHALL, INC.

PREPARED FOR:

OREGON DEPARTMENT OF ADMINISTRATIVE SERVICES

E-Government Survey Report

October 2015

PREPARED BY:

DHM RESEARCH

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1. | INTRODUCTION AND METHODOLOGY

DHM Research conducted a telephone survey of residents in Oregon. The objective of the survey was to gauge Oregonian's use of and attitude towards the online delivery of government services. The survey assessed Oregonians' Internet access, experience using the State of Oregon website, and preferences relating to the online delivery of services. Results are benchmarked against a similar survey conducted by DHM Research in 2013.

Research Design: Between October 15th and 19th, 2015 DHM Research conducted a telephone survey of 1,200 residents in the state of Oregon. Of those interviews, 400 were conducted in the Tri-County area (Clackamas, Multnomah, and Washington counties), 400 came from the Willamette Valley (Benton, Lane, Linn, Marion, Polk, and Yamhill counties), and 400 from the rest of the state. The survey took an average of 12 minutes to administer. The sample size is sufficient to assess opinions generally, and allows a review by multiple subgroups including age, gender, and other demographics.

For a representative sample, quotas were set by age, gender, and geographic area. In the annotated questionnaire, results may add up to 99% or 101% due to rounding. Although the sample was designed as evenly divided among three regions of the state, the total results reported in this survey have been weighted to account for the relative difference in size between these regions.

Respondents were contacted randomly using multiple samples including listed, cell phone, and voter samples. In gathering responses, a variety of quality control measures were employed, including questionnaire pre-testing and validation.

Statement of Limitations: Any sampling of opinions or attitudes is subject to a margin of error. The margin of error is a standard statistical calculation that represents differences between the sample and total population at a confidence interval, or probability, calculated to be 95%. This means that there is a 95% probability that the sample taken for this study would fall within the stated margins of error if compared with the results achieved from surveying the entire population.

For a sample size of 1,200, the margin of error for each question falls between +/-1.7% and +/-2.8% at the 95% confidence level. For a sample size of 400, the margin of error for each question falls between +/-2.9% and +/-4.9%, at the 95% confidence level. The reason for the difference lies in the fact that, when response categories are relatively even in size, each is numerically smaller and thus slightly less able – on a statistical basis – to approximate the larger population.

DHM Research: DHM Research has been providing opinion research and consultation throughout the Pacific Northwest and other regions of the United States for over three decades. The firm is non-partisan and independent and specializes in research projects to support public policy-making. www.dhmresearch.com

2. | SUMMARY & OBSERVATIONS

Visiting a state website is now the preferred method for contacting the state or finding information, edging out telephone calls.
- About a third of Oregonians (35%) would prefer to access a website for information, versus making a phone call (34%) or sending an email (14%).
- In general, 87% have heard of Oregon.gov. This number is slightly lower than in 2013 (89%), but the difference is not statistically significant.
- However, a greater proportion of Oregonians (70%) have actually visited Oregon.gov than in 2013 (66%).

Oregonians continue to use Oregon.gov to find general information, look for services, and complete transactions.
- The most common reason to visit Oregon.gov is *to look for information, data or services* (60%). This is followed by visits *to complete a transaction online, such as reserving a campsite or renewing car registration* (43%).
- When asked in an open-ended format about other reasons to visit Oregon.gov, the most common response is for general research needs (23%).

The number of Oregonians using state websites is growing, and many would like the opportunity to use the state website to share their opinions on public policy and to find information about state administration.
- Four in 10 (39%) of Oregonians have received government services online, but the number is growing. In 2013, only 23% of Oregonians had received services online.
- Seventy-two percent (72%) of Oregonians say it is *very* or *somewhat important* that they be able to *provide their opinion or review other citizen opinions about a public policy or planning issue* by visiting a state agency's website.
- About as important to Oregonians is *the ability to find information and data about state finances, payroll, and services* through an agency website. Over two-thirds (69%) of residents said this was *very* or *somewhat important* to them.
- About one out of every 10 users (13%) still struggle to find the information for which they are searching, although the type of information these users are searching for varies.
- However, the majority of Oregonians (79%) say that finding agency contact information is easy.

The vast majority of Oregonians agree with the proposed redesign of the State's website, and they place a high level of importance on security.
- Most Oregonians (81%) agree with the aims of the website redesign.
- Nearly all Oregonians (95%) think securely storing personal information is *extremely important*, *very important*, or *important.*
- Fewer, however, are *very* or *somewhat confident* that the state is currently storing that information securely (55%).

3. | KEY FINDINGS

3.1 | Information Access

Respondents were first asked what method of communication they find most convenient when needing to contact an Oregon state government agency (Q1).

**Chart 1
Methods of Contact**

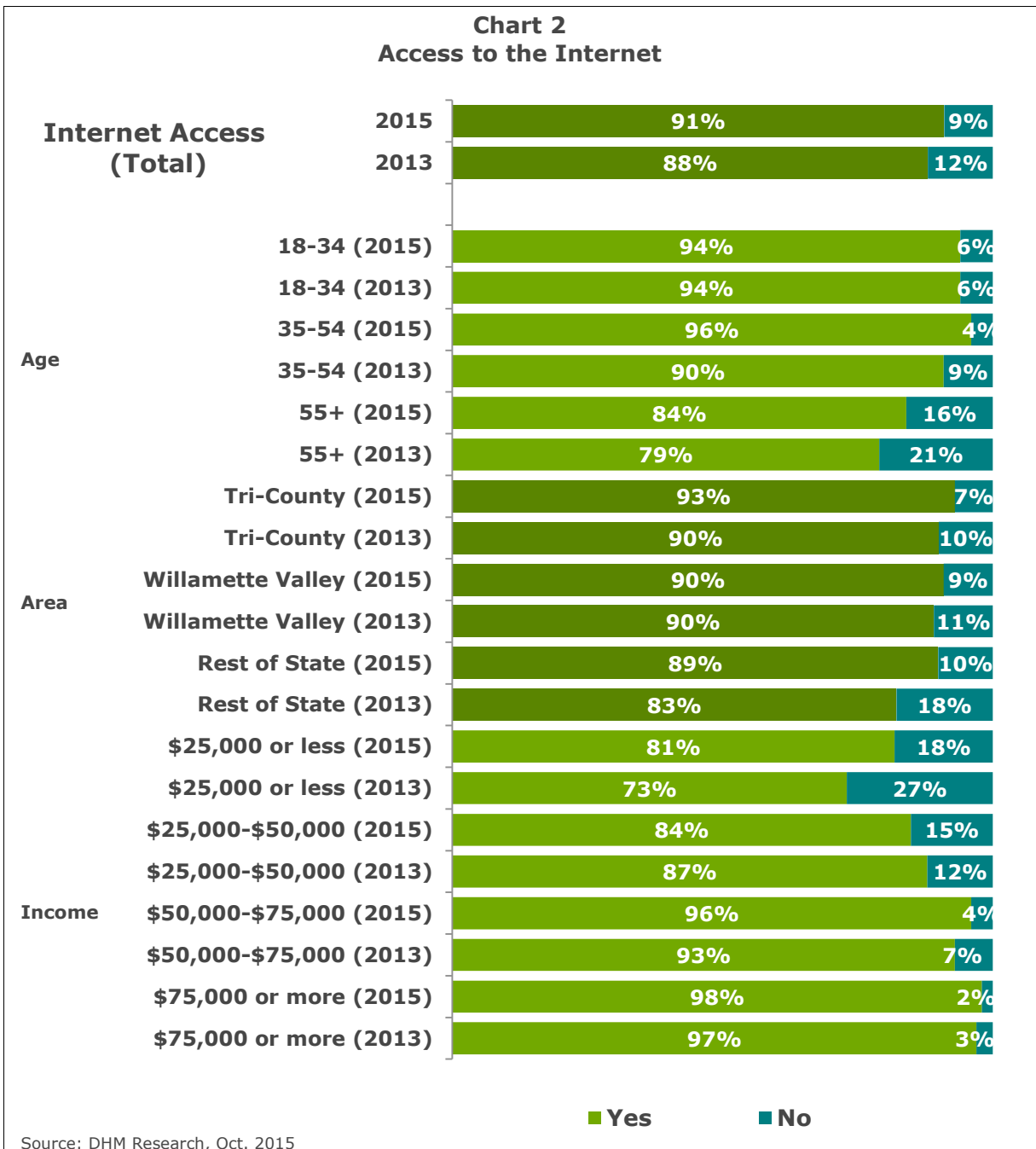| Method	2015	2013
Visit a website	35%	29%
Telephone call	34%	36%
Send an email	14%	15%
Visit an office	7%	6%
Write a letter	4%	4%
Other	1%	4%
Don't know	4%	7%

Source: DHM Research, Oct. 2015
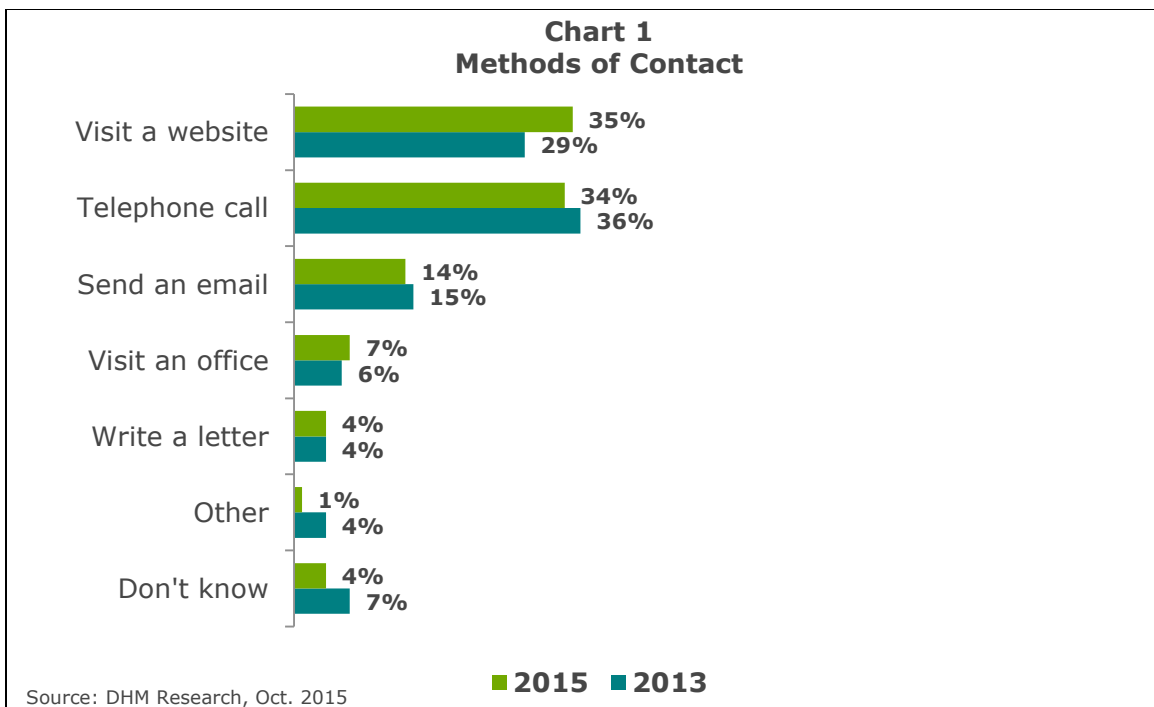
A little over one-third of respondents (35%) said they prefer to *visit a website* when they need to contact an Oregon state government agency. Another third of respondents (34%) still prefer to make a *telephone call.* Some still prefer *sending an email* (14%), but traditional methods such as *visiting an office* (7%) and *writing a letter* (4%) are reportedly the least convenient.

Last time this question was posed to Oregonians, in 2013, *telephone calls* (36%) were preferred over *visiting a website* (29%).

Demographic Differences: Tri-County residents (41%) are more likely to prefer *visiting a website* than Willamette Valley residents (32%) or residents of other parts of the state (30%). Younger age groups prefer *websites* as well; 18-34 year olds (37%) and 35-54 year olds (41%) prefer it more than the 55+ group (28%). Those 55 and older are more inclined to make a *telephone call* (42%).
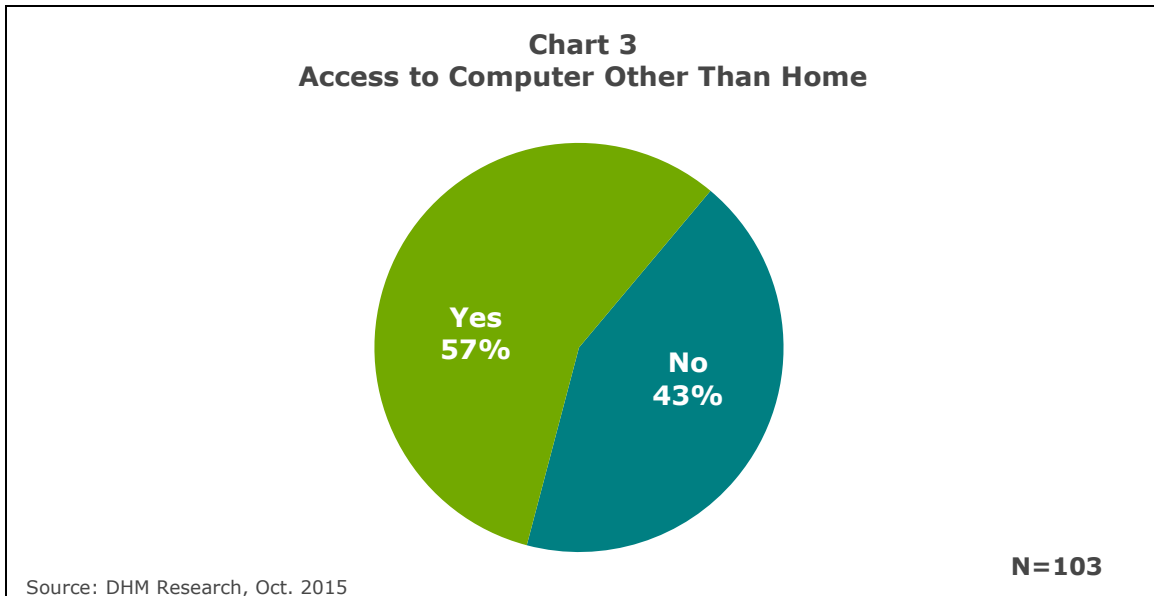
Respondents were asked whether they had access to the internet through a computer, smart phone, or tablet device at their home (Q2).

Chart 2
Access to the Internet

Category		Year	Yes	No
Internet Access (Total)		2015	91%	9%
		2013	88%	12%
Age	18-34 (2015)		94%	6%
	18-34 (2013)		94%	6%
	35-54 (2015)		96%	4%
	35-54 (2013)		90%	9%
	55+ (2015)		84%	16%
	55+ (2013)		79%	21%
Area	Tri-County (2015)		93%	7%
	Tri-County (2013)		90%	10%
	Willamette Valley (2015)		90%	9%
	Willamette Valley (2013)		90%	11%
	Rest of State (2015)		89%	10%
	Rest of State (2013)		83%	18%
Income	$25,000 or less (2015)		81%	18%
	$25,000 or less (2013)		73%	27%
	$25,000-$50,000 (2015)		84%	15%
	$25,000-$50,000 (2013)		87%	12%
	$50,000-$75,000 (2015)		96%	4%
	$50,000-$75,000 (2013)		93%	7%
	$75,000 or more (2015)		98%	2%
	$75,000 or more (2013)		97%	3%

■ Yes ■ No

Source: DHM Research, Oct. 2015

Nine out of 10 respondents (91%) reported having access to the internet at home through a computer, smartphone, or tablet. These numbers are a slight increase from 2013, which showed that 88% of Oregonians have home internet access.

Demographic Differences: The Oregonians least likely to have home internet are those 55 and older (84%), those with a high school diploma or less (83%), and those making $25,000 per year or less (81%).

Those who reported not having access to the internet at home were asked if they had access at a library, friend's house, the office, or somewhere else (Q3).

Chart 3
Access to Computer Other Than Home

Yes
57%

No
43%

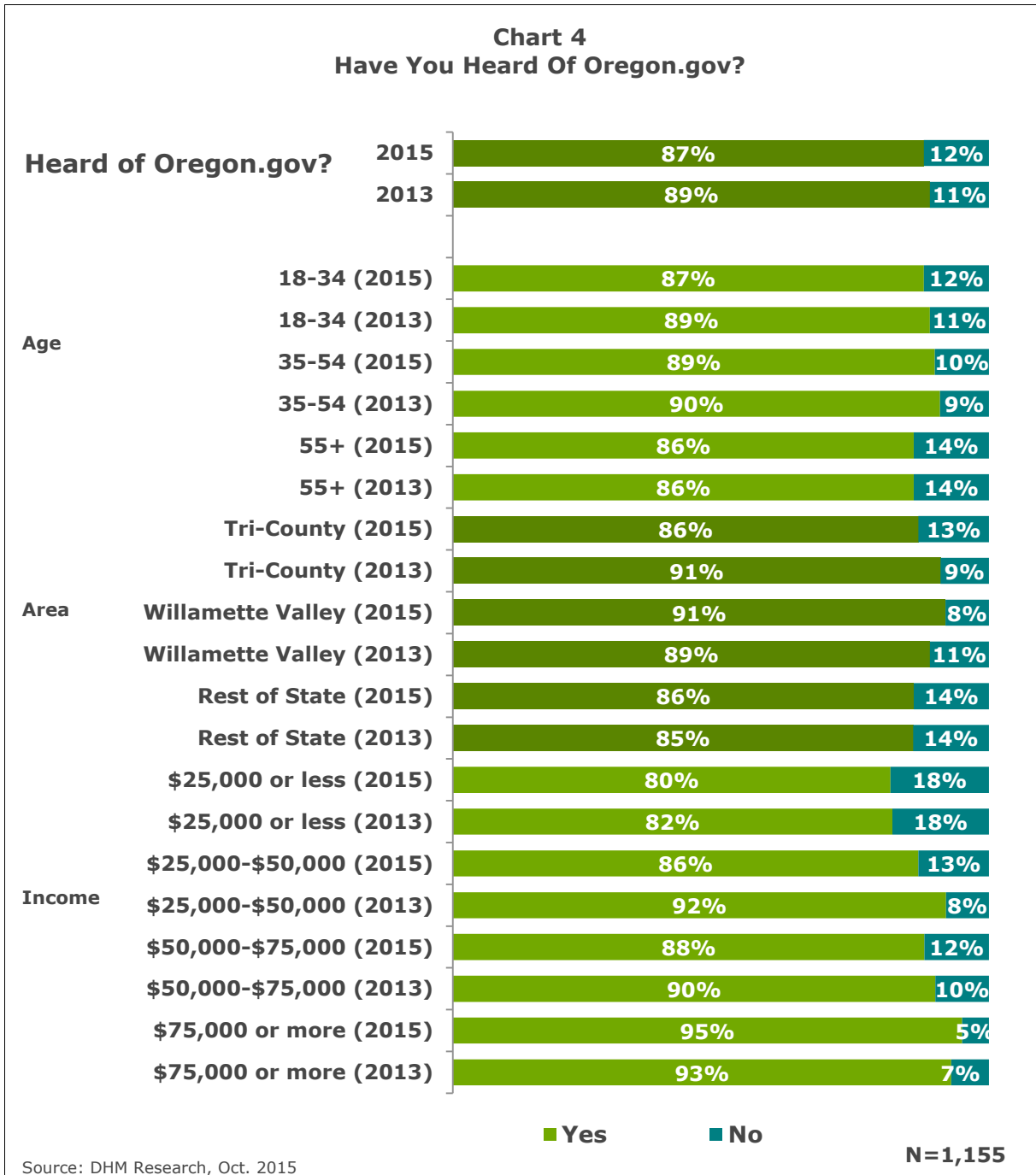N=103

Source: DHM Research, Oct. 2015

Over half of respondents who said they do not have home internet access said they could access the internet elsewhere (57%). This number is up seven percentage points since 2013.

Demographic Differences: Of those Oregonians without home access to the internet, certain subpopulations are more likely to have access through a friend, a library, or other source. While, on the whole, 57% of Oregonians without their own access can rely on another source, that number is higher for residents of the Willamette Valley (67%), men (68%), and residents with some college or more (some college: 65%; college degree or more: 68%). Residents with higher incomes are also more likely to have internet access through another source, with 78% of those making between $50,000 and $74,999 per year and 74% of those making more than $75,000 per year said they could access the internet outside their home.

3.2 | E-Government Experience

Respondents were asked a series of questions about the Oregon.gov website. First, they were asked if they had ever heard of the Oregon.gov website (Q4).

Chart 4
Have You Heard Of Oregon.gov?

	Yes	No
Heard of Oregon.gov? 2015	87%	12%
2013	89%	11%
Age 18-34 (2015)	87%	12%
18-34 (2013)	89%	11%
35-54 (2015)	89%	10%
35-54 (2013)	90%	9%
55+ (2015)	86%	14%
55+ (2013)	86%	14%
Area Tri-County (2015)	86%	13%
Tri-County (2013)	91%	9%
Willamette Valley (2015)	91%	8%
Willamette Valley (2013)	89%	11%
Rest of State (2015)	86%	14%
Rest of State (2013)	85%	14%
Income $25,000 or less (2015)	80%	18%
$25,000 or less (2013)	82%	18%
$25,000-$50,000 (2015)	86%	13%
$25,000-$50,000 (2013)	92%	8%
$50,000-$75,000 (2015)	88%	12%
$50,000-$75,000 (2013)	90%	10%
$75,000 or more (2015)	95%	5%
$75,000 or more (2013)	93%	7%

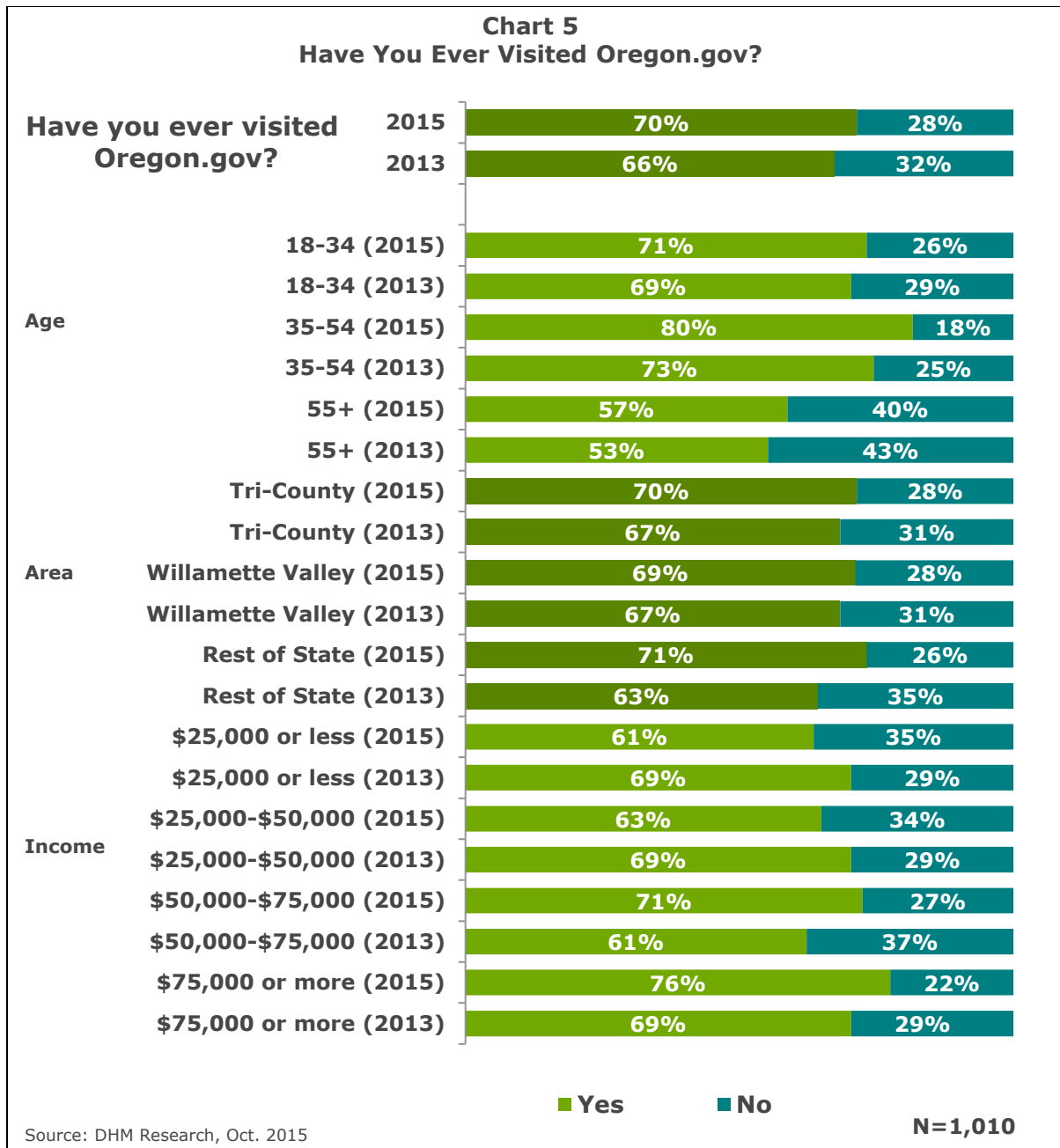■ **Yes** ■ **No**

Source: DHM Research, Oct. 2015

N=1,155

Nine in 10 (87%) respondents had heard of Oregon.gov, which is about the same as in 2013 (89%). The chart above shows very small fluctuations between 2015 and 2013,

depending on the area of the state. It is safe to assume that awareness of Oregon.gov has remained relatively constant.

Demographic Differences: Income made a big difference in whether or not residents had heard of Oregon.gov. Eighty percent (80%) those making less than $25,000 per year had heard of it and awareness steadily increased with income. For those making between $25,000 and $49,999 per year, that number was 86%, going up to 88% for those making between $50,000 and $74,999 per year. Those making $75,000 or more were most likely to have heard of the site, with 95% aware.

Willamette Valley residents were also more likely to have heard of the website, at 91%, compared to 86% for both the Tri-County area and the rest of the state.

Respondents were then asked whether they had ever visited the Oregon.gov website (Q5).

Chart 5
Have You Ever Visited Oregon.gov?

Have you ever visited Oregon.gov?		Yes	No
	2015	70%	28%
	2013	66%	32%
Age	18-34 (2015)	71%	26%
	18-34 (2013)	69%	29%
	35-54 (2015)	80%	18%
	35-54 (2013)	73%	25%
	55+ (2015)	57%	40%
	55+ (2013)	53%	43%
Area	Tri-County (2015)	70%	28%
	Tri-County (2013)	67%	31%
	Willamette Valley (2015)	69%	28%
	Willamette Valley (2013)	67%	31%
	Rest of State (2015)	71%	26%
	Rest of State (2013)	63%	35%
Income	$25,000 or less (2015)	61%	35%
	$25,000 or less (2013)	69%	29%
	$25,000-$50,000 (2015)	63%	34%
	$25,000-$50,000 (2013)	69%	29%
	$50,000-$75,000 (2015)	71%	27%
	$50,000-$75,000 (2013)	61%	37%
	$75,000 or more (2015)	76%	22%
	$75,000 or more (2013)	69%	29%

■ Yes ■ No

Source: DHM Research, Oct. 2015   N=1,010

Seven in 10 Oregonians (70%) reported that they had visited the Oregon.gov website, which reflects a four percentage point increase since 2013.
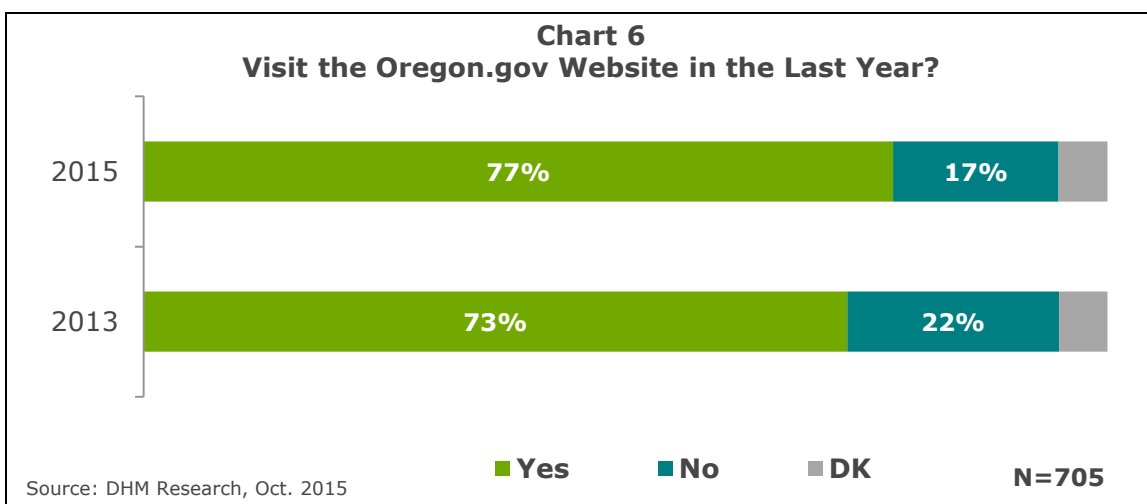
Demographic Differences: Use of the Oregon.gov website varied with age and education level. Residents ages 18-34 were about average, with a 71% usage rate. Residents ages

35-54 were more likely to have used the site, at 80%, and those 55 and older were least likely, at 57%.

This represents a change from 2013, when the youngest residents, ages 18-34, were the most likely to have visited the Oregon.gov website, with 69%. In 2013, 73% of those ages 35-54 reported visiting the site. Over the last two years, that number has increased by seven percentage points.

Usage also rose with education level. Just over half of residents with a high school diploma or less (52%) had used the site, while two-thirds of residents with some college (66%) had. More than three-quarters of residents with a college degree or more (77%) had visited Oregon.gov before.
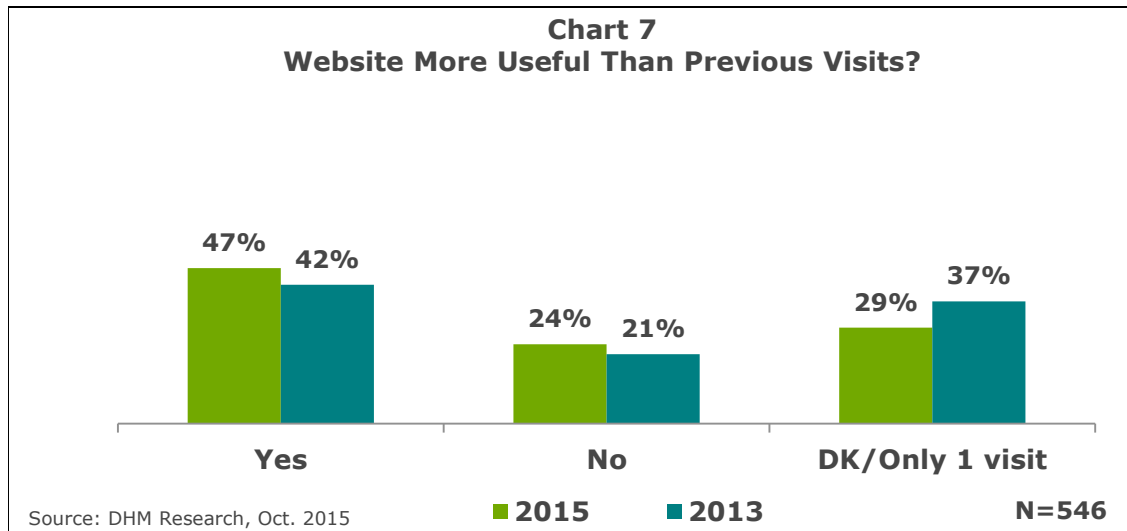
Respondents who had visited Oregon.gov were asked if they had visited the website in the last year (Q6).

Chart 6
Visit the Oregon.gov Website in the Last Year?

Year	Yes	No
2015	77%	17%
2013	73%	22%

■ Yes   ■ No   ■ DK   **N=705**

Source: DHM Research, Oct. 2015

Over three-quarters (77%) of respondents who had visited the Oregon.gov website had done so in the last year. This data point shows that about 54% of *all* Oregonians have visited Oregon.gov in the last year.

Demographic Differences: There were no statistically significant differences.

Those who had visited Oregon.gov in the past year were asked whether they thought it had become more useful since their earlier visits (Q7).

Chart 7
Website More Useful Than Previous Visits?

Source: DHM Research, Oct. 2015 ■ **2015** ■ **2013** N=546

Nearly half of respondents (47%) said the website has become more useful than their earlier visits. Meanwhile, about one-quarter (24%) said that it hadn't, and almost a third (29%) didn't know or only visited the website once.
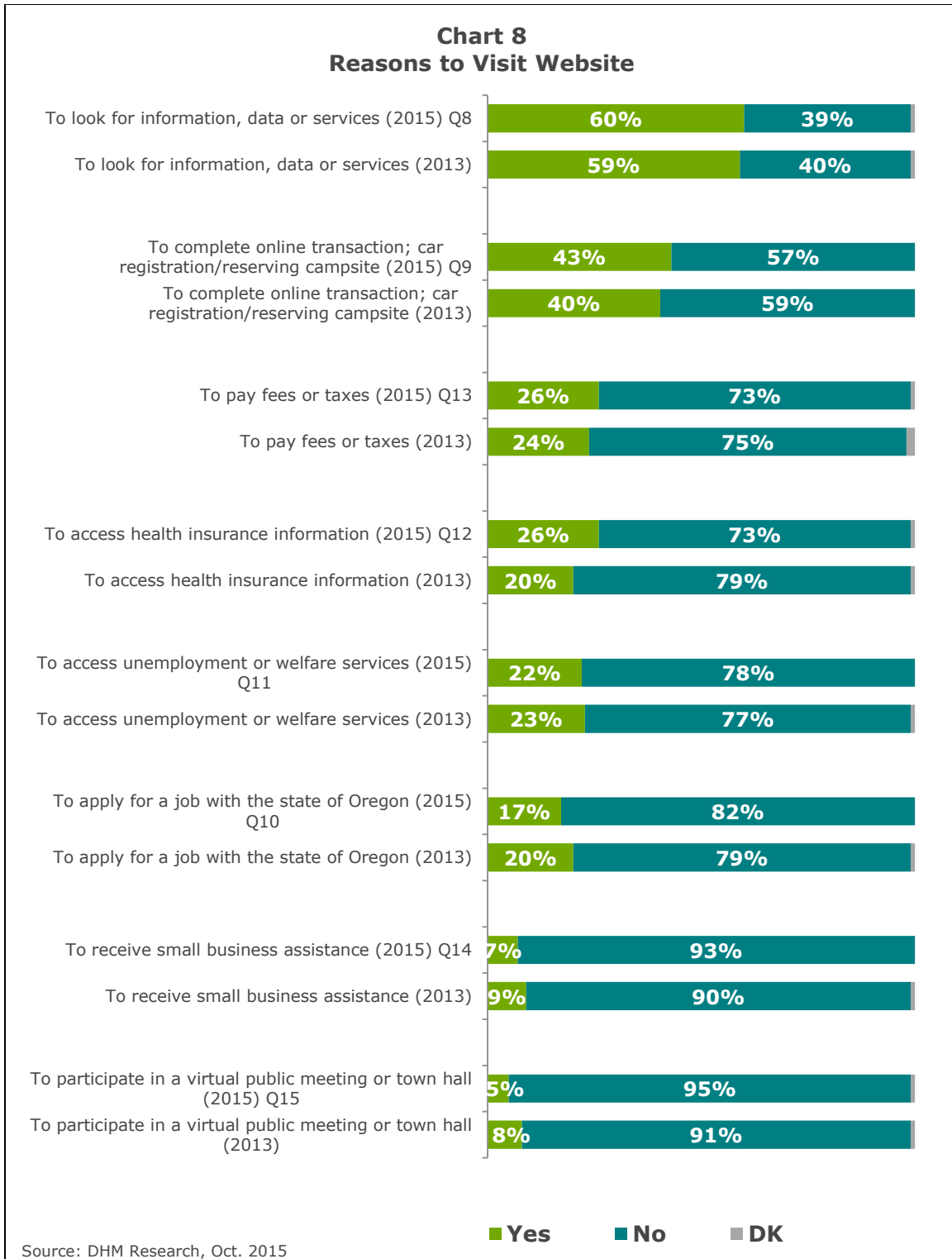
These results are similar to 2013. However, the number of respondents who didn't know or only visited the website once dropped eight percentage points, from 37% in 2013 to 29% in 2015. The number of website users who thought Oregon.gov had become more useful increased five percentage points since 2013.

The results of this section show a small but meaningful improvement in the number of Oregonians who visit Oregon.gov, as well as the frequency of their visits and their impressions of the website's utility.

Demographic Differences: There are no statistically significant differences.

3.3 | State of Oregon Government Agency Website Activity

Respondents were asked a series of questions about their reasons for visiting a State of Oregon government agency website (Q8-Q15).

Chart 8
Reasons to Visit Website

Reason	Yes	No
To look for information, data or services (2015) Q8	60%	39%
To look for information, data or services (2013)	59%	40%
To complete online transaction; car registration/reserving campsite (2015) Q9	43%	57%
To complete online transaction; car registration/reserving campsite (2013)	40%	59%
To pay fees or taxes (2015) Q13	26%	73%
To pay fees or taxes (2013)	24%	75%
To access health insurance information (2015) Q12	26%	73%
To access health insurance information (2013)	20%	79%
To access unemployment or welfare services (2015) Q11	22%	78%
To access unemployment or welfare services (2013)	23%	77%
To apply for a job with the state of Oregon (2015) Q10	17%	82%
To apply for a job with the state of Oregon (2013)	20%	79%
To receive small business assistance (2015) Q14	7%	93%
To receive small business assistance (2013)	9%	90%
To participate in a virtual public meeting or town hall (2015) Q15	5%	95%
To participate in a virtual public meeting or town hall (2013)	8%	91%

■ Yes ■ No ■ DK

Source: DHM Research, Oct. 2015

The top reason for visiting a State of Oregon government agency website was *to look for information, data or services* (60%), followed by *to complete a transaction online such as reserving a campsite or renewing car registration* (43%).

The number of Oregonians who used an agency website *to look for a job with the State of Oregon* dropped from 20% in 2013 to 17%, perhaps reflecting continued economic recovery. Meanwhile, the number of Oregonians who used an agency website *to access information about health insurance* rose from 20% in 2013 to 26%, likely due to the changes in health care policy that have taken place over the last few years.

The least common reasons to visit an agency website were *to receive small business assistance* (7%) and *to participate in a virtual public meeting or town hall* (5%). As shown in the chart above, these responses are consistent with the 2013 findings.

Demographic Differences: There were differences in usage based on age and education.

Residents ages 35-54 were more likely to use the website *to look for information, data or services* (71%), compared to 58% of residents ages 18-34 and 51% of residents 55 and older. The middle age group, 35-54, was also most likely to use the site *to complete a transaction, such as reserving a campsite or renewing car registration* (53%), compared to 40% for ages 18-34 and 36% for 55 and older. The same held true for using the site *to pay fees and taxes*. Thirty-four percent (34%) of residents ages 35-54 used the website for this purpose, compared to 20% of residents ages 18-34 and 22% of those 55 and older.

Younger Oregonians (18-34) were more likely to use the site *to access health insurance information* (33%) than older Oregonians (35-54: 24%; 55+: 23%). Younger Oregonians (18-34) were also more likely to use the site *to access unemployment or welfare services* (30%), compared to their older counterparts (35-54: 22%; 55+: 14%).

As education levels rose, so did the number of residents who used Oregon.gov *to look for information* or *to complete a transaction*. Residents with a high school diploma or less were the least likely to use either of these functions (42% and 29%, respectively). Those with some college experience were a bit more likely to do so, with 56% and 41% looking for information or completing a transaction. Those with college degrees or more were the most likely to use the site for these functions (69% and 50%)

Those who had visited State of Oregon government agency websites were provided an opportunity to identify other reasons they visited these websites (Q16). Table 1 shows the most frequently cited reasons for visiting these websites.
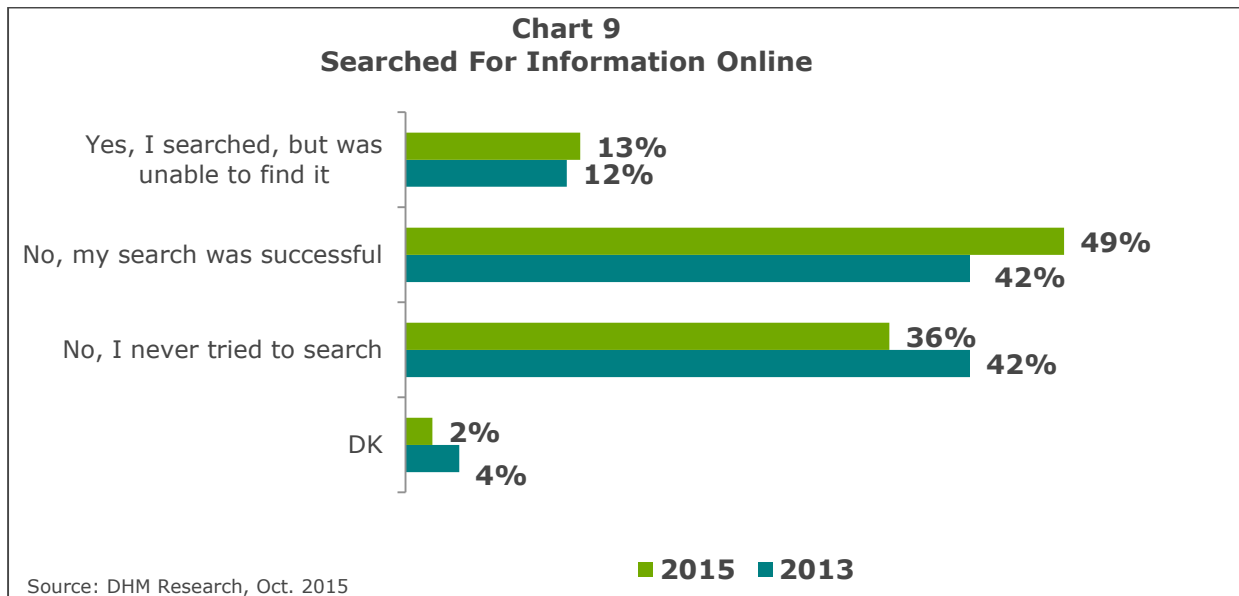
Table 1
Other Reasons For Visiting Oregon.gov

Response Category	2015 N=923	2013 N=912
Research/information/available resources-general	23%	13%
Licensing/permit renewal/requirements-general	8%	3%
DMV/vehicle registration/driver license	7%	6%
Health insurance/information regarding health	7%	3%
Outdoor recreation information/licensing (hunting, fishing, camping)	6%	4%
Jobs/unemployment	5%	6%
Tax information	4%	3%
Has not visited website	--	5%
Business license/registration	--	3%
All other responses	3% or less	2% or less
None/nothing	31%	24%
Don't know	2%	11%

Source: DHM Research, Oct. 2015

The most marked difference between 2013 and 2015 is the number of respondents who used Oregon.gov for *general research* needs, which rose ten percentage points. The number of respondents who said they didn't know why they had visited the website dropped 9% over that same time period. This may simply show that respondents were better able to recall why they used the website.

Demographic Differences: Among respondents who said they visited a state agency website for *general research and information*, demographic differences mirrored those for website usage in general. Specifically, Tri-County residents (29%) were more likely to have visited a site for this purpose than those in the Willamette Valley (15%) or those in the rest of the state (24%). Residents with higher levels of education were also more likely to have visited an agency site for general information: 26% of those with college degrees or more, compared to 23% of those with some college and 17% of those with a high school diploma or less.

All respondents were then asked if they had ever searched for a particular State of Oregon service or information online but were unable to find it (Q17).

**Chart 9
Searched For Information Online**

Yes, I searched, but was unable to find it	13% (2015)	12% (2013)
No, my search was successful	49% (2015)	42% (2013)
No, I never tried to search	36% (2015)	42% (2013)
DK	2% (2015)	4% (2013)

■ 2015 ■ 2013

Source: DHM Research, Oct. 2015

Nearly half (49%) of respondents had searched for a specific government service or information and were able to find it. About a third (36%) simply hadn't attempted to find a certain agency website, and the remainder, 13% searched but couldn't find what they were looking for. These responses show an uptick in the number of respondents who successfully searched for a particular resource, a 7% increase over the last two years, but the number of respondents who conducted unsuccessful searches remained the same.

Demographic Differences: Residents who were younger had an easier time finding the information they were looking for, and that ease declined with age. Fifty-eight percent (58%) of residents ages 18-34 were successful in their search, compared to 50% of residents ages 35-54 and 39% of residents 55 and older.

Residents with higher incomes were also more likely to be successful in their search. While 38% of residents making less $25,000 per year successfully completed a search, 45% of those making $25,000 to $49,999 were successful, along with 55% of those making between $50,000 and $74,999 and 56% of those making more than $75,000.

Residents 55 and older were the least likely to have attempted a search (46%), followed by residents ages 18-34 (31%), and last residents 35-54 (29%). This is unsurprising given the age distribution of Oregon.gov users discussed above (Q5).

Those who had searched but were unable to find what they needed were asked in an open-ended format to describe what they were searching for (Q18). The resources that were reportedly difficult to find included:

Table 2
Resources Oregonians Could Not Find On State Websites

Response Category	2015 N=157	2013 N=139
Information—general	18%	5%
Laws/codes/planning/zoning	10%	2%
Taxes	6%	2%
Unemployment	5%	2%
Health insurance/health info	4%	6%
Department of Education	4%	--
State records	3%	--
Fishing License	3%	--
Senior services	2%	--
Social services/food services/housing	2%	4%
DMV	2%	4%
Political information	--	5%
Department of Human Services	--	3%
Transportation/road conditions/ODOT	--	3%
Park information	--	2%
Camp sites	--	2%
Personal information	--	2%
Attorney General	--	2%
Postal service/post office	--	2%
All other responses	5%	1% or less
No/Don't recall	36%	30%

Source: DHM Research, Oct. 2015

Demographic Differences: There are no statistically significant differences.

Those who had searched for a particular State of Oregon government service or information online (whether it was successful or not) were asked if they thought searching for contact information on these websites was very easy, fairly easy, fairly difficult, or very difficult (Q19).


Chart 10
Ease of Searching for Contact Information

	Very easy	Fairly easy	Fairly difficult	Very difficult	DK
2015	22%	57%	12%	3%	6%
2013	13%	69%	11%	2%	5%

Source: DHM Research, Oct. 2015   N=742
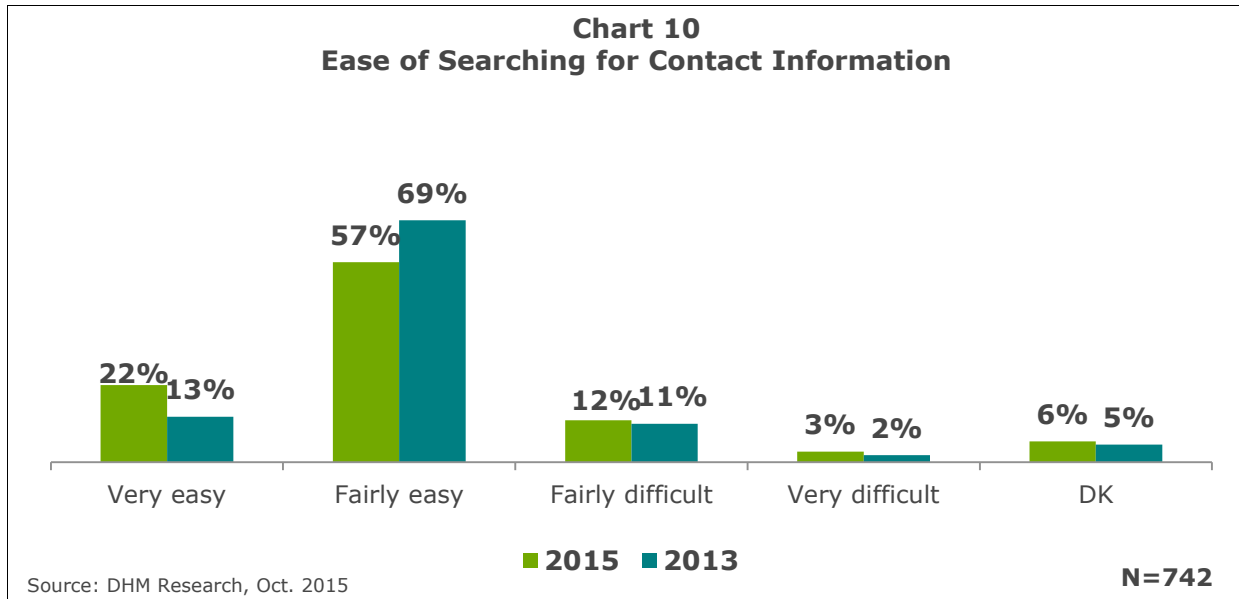
Most State of Oregon website users said searching for contact information was *fairly easy* (57%) and an additional 22% said it was *very easy.* About one in 10 (12%) struggled somewhat and reported that it was *fairly difficult* to find contact information. Only 3% said it was *very difficult* to do so.

Demographic Differences: The youngest group, 18-34, had the easiest time finding contact information (88%). Facility declined with age; 77% of 35-54 year olds said finding contact information was *very* or *somewhat easy* and 72% of those 55 and older described it as *very* or *somewhat easy*.

3.4 | State of Oregon Online Services

Respondents were asked whether they felt that a series of online and traditional services were very important, somewhat important, not too important, or not at all important (Q20-Q23).

**Chart 11
Importance of Online Services for Public Engagement**

Source: DHM Research, Oct. 2015
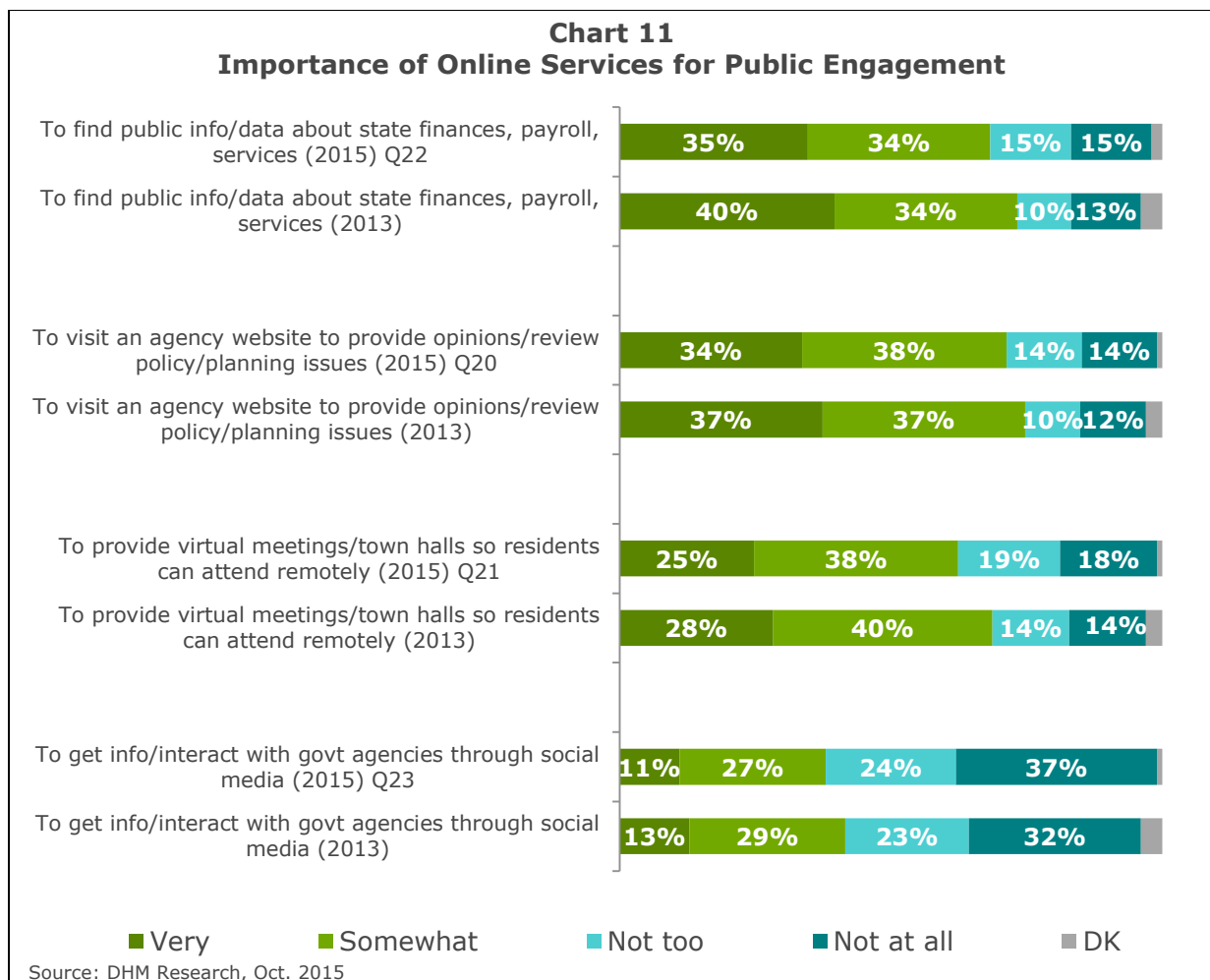
Most respondents felt that *the ability to visit a State of Oregon government agency website to provide your opinion or review other citizen opinions about a public policy or planning issue* was most important, with 34% ranking it *very important* and 38% saying it was *somewhat important.*

However, respondents also thought it was quite important *to have the ability to find public information and data about state finances, payroll, and services* (35% very important, 34% somewhat important).
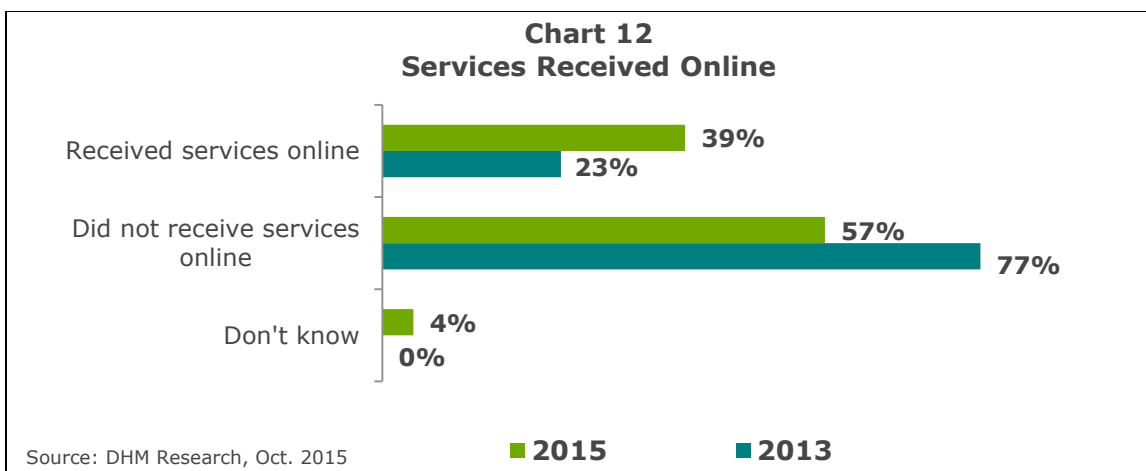
Despite the fact that only 5% of respondents had *used Oregon.gov to participate in a virtual meeting or town hall* (Q15), 63% said that *offering this service* (Q21) was *somewhat* or *very important*. Meanwhile, most respondents did not prioritize social media: only 38% said

the ability to get information and interact with government agencies through social media was *somewhat* or *very important.*

Demographic Differences: For the most part, younger residents placed greater importance on these online services than did their older counterparts. For instance, when asked to rate the importance of *the ability to get information and interact with government agencies through social media,* over half of residents 18-34 (53%) said this was *very* or *somewhat important*, compared to 32% of 35-54 year olds and 30% of those 55 and older (Q23).

The exception to this trend is Q21, which had residents rate the importance of *the ability to provide virtual meetings or town halls*. Here, 67% of 18-34 year olds said it was *very* or *somewhat important*, while 71% of 35-54 said so. Exactly half (50%) of those 55 and older said this was *very* or *somewhat important*.

Respondents were asked a series of questions relating to their experience with receiving State of Oregon government services online, starting with whether they had received services or not (Q25A).

Chart 12
Services Received Online

Received services online: 39% (2015), 23% (2013)
Did not receive services online: 57% (2015), 77% (2013)
Don't know: 4% (2015), 0% (2013)
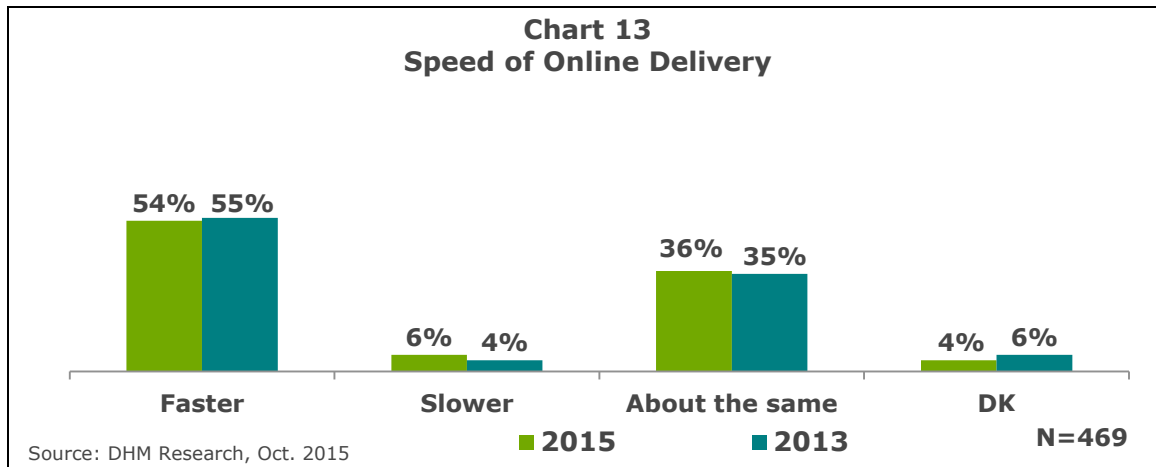
Source: DHM Research, Oct. 2015

■ 2015 ■ 2013

The number of respondents who *had received government services online* jumped sixteen percentage points since 2013. Although more than half (57%) of Oregonians still *have not received services online*, that number is down from 77% in 2013. Four percent (4%) weren't sure if they had or not.

Demographic Differences: The likelihood that a resident had received a government service online increased with education level and income. While 27% of those with a high school diploma or less received a service online, 35% of those with some college experience and 46% of those with a college degree or more had done so.

For income, those making less than $25,000 per year were the least likely to have received a service online (30%), followed by those making $25,000 to $49,999 per year (36%).

Residents who make between $50,000 and $74,999 were slightly less likely (46%) to have received a service online than those making $75,000 or more (44%).

Respondents were asked about the speed of online delivery and whether they felt it was faster, slower, or about the same (Q24).

Chart 13
Speed of Online Delivery

Source: DHM Research, Oct. 2015

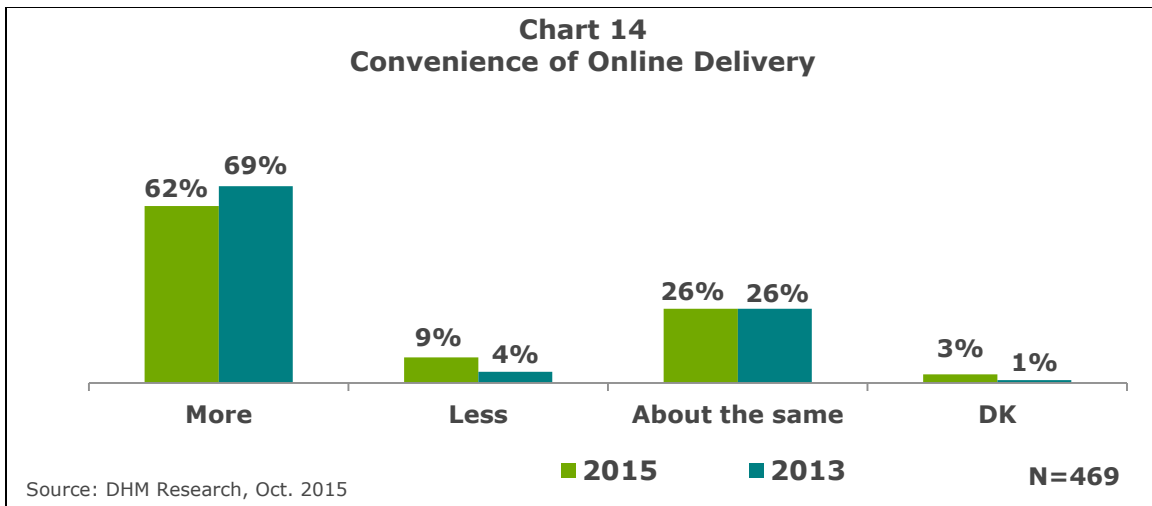|	Faster	Slower	About the same	DK
2015	54%	6%	36%	4%
2013	55%	4%	35%	6%

N=469

Most felt that the speed of online delivery was either *faster* (54%) or *about the same* (36%). In 2013, a few more respondents said that online delivery was *faster* (55%), but the difference is not statistically significant.

Demographic Differences: Tri-County residents were the most likely to say online delivery speeds were *faster* than traditional methods (57%). Willamette Valley residents (50%) and those in the rest of the state (52%) were a little less likely to say so.

Younger residents were also more likely to rate the delivery speed of online services as *faster*, at 62%. Meanwhile, about half of residents 35-54 (50%) and 55 and older (51%) said online delivery was *faster*.
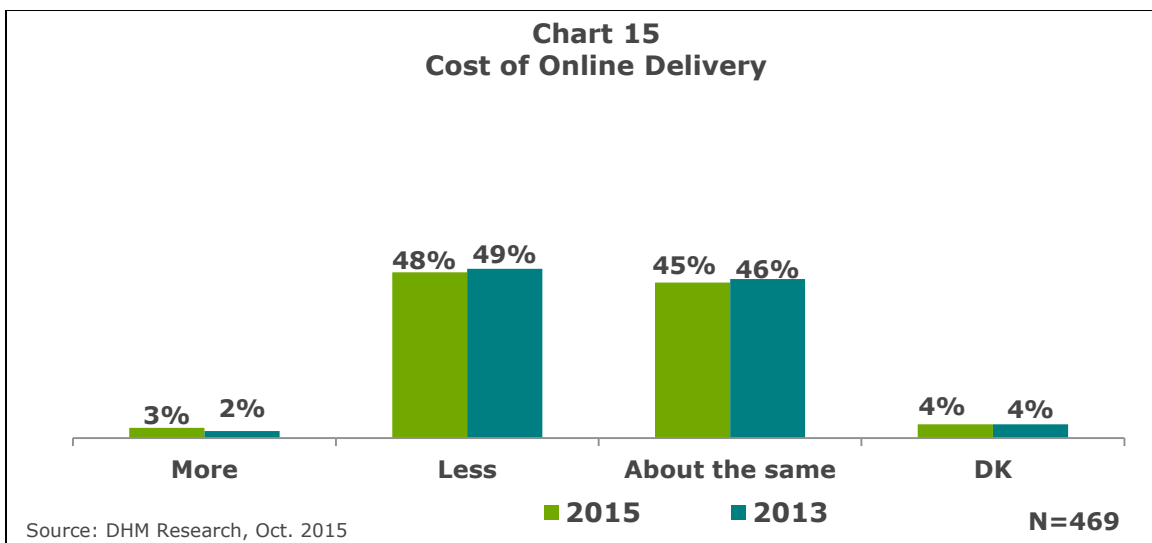
Respondents were asked whether the convenience of online delivery was less convenient, more convenient, or about the same (Q25).

Chart 14
Convenience of Online Delivery

	More	Less	About the same	DK
2015	62%	9%	26%	3%
2013	69%	4%	26%	1%

Source: DHM Research, Oct. 2015   N=469

Nearly two-thirds (62%) of respondents said that online delivery was *more convenient*, while about one-quarter (26%) said online delivery was *about the same* as traditional methods. The proportion of respondents who thought online delivery was *more convenient* fell seven percentage points since 2013, while the number who said it was *less convenient* rose 5% over the same period.

Demographic Differences: There are no statistically significant differences.

Respondents were asked whether the cost of online delivery was less costly, more costly, or about the same (Q27).

Chart 15
Cost of Online Delivery

	More	Less	About the same	DK
2015	3%	48%	45%	4%
2013	2%	49%	46%	4%

Source: DHM Research, Oct. 2015   N=469

Nearly all respondents agreed that online delivery was either *less costly* (48%) or *about the same* (45%) as traditional methods. This result is consistent with the 2013 data.
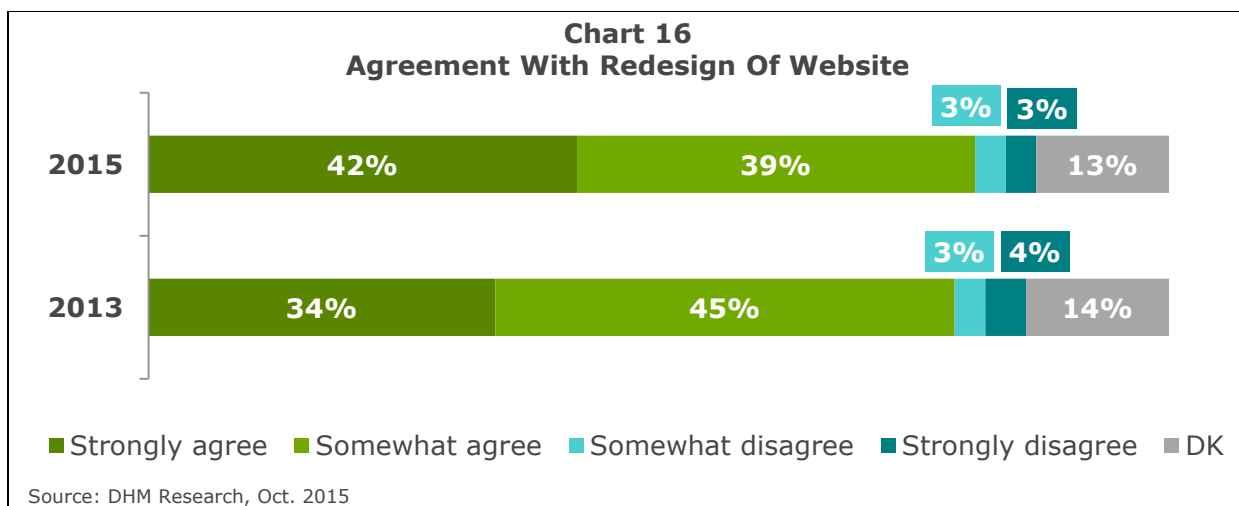
Demographic Differences: Over half of the youngest residents, ages 18-34 (58%), said online delivery was *less costly*. That differed statistically significantly from residents ages 35-54, 39% of whom said online delivery was *less costly* (most of the middle group, 53%, said it was about the same). About half of residents 55 and older (49%) said online delivery was *less costly*.

3.5 | State of Oregon Website Redesign

Respondents were asked whether they agreed with the overall aim for the redesign of the State of Oregon's website (Q27).

Respondents were first read the following description about the redesign and then asked whether they strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the way the State of Oregon is redesigning its website.

The State of Oregon is beginning the process of redesigning its website and the websites of state departments. The overall aim is to have consistent elements across state agency websites so visitors know they are doing business with the state of Oregon. This includes using the Oregon.gov logo, search, location of contact information, and navigation. For each department website, the design will vary based on feedback from actual Oregon residents who regularly use the site. This is done to provide the best user experience to accomplish the tasks performed by most Oregonians. Ease of use is of primary importance within the standard framework of the State's websites.

**Chart 16
Agreement With Redesign Of Website**

2015: Strongly agree 42%, Somewhat agree 39%, Somewhat disagree 3%, Strongly disagree 3%, DK 13%

2013: Strongly agree 34%, Somewhat agree 45%, Somewhat disagree 3%, Strongly disagree 4%, DK 14%

■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree ■ DK

Source: DHM Research, Oct. 2015

Eight of 10 respondents (80%) said they *somewhat* or *strongly agree* with the way the State of Oregon is redesigning its website (42% strongly, 39% somewhat). This combined support is up six percentage points since 2013.

Demographic Differences: The vast majority of younger residents, 18-34, said they agreed with the website redesign goals (91%). Most residents ages 35-54 (85%) also agreed, as did two-thirds of residents 55 and older (67%).

Respondents who disagreed with the way the state of Oregon is redesigning its website were provided the open-ended opportunity to explain why (Q28). Below are the most common responses that were given:
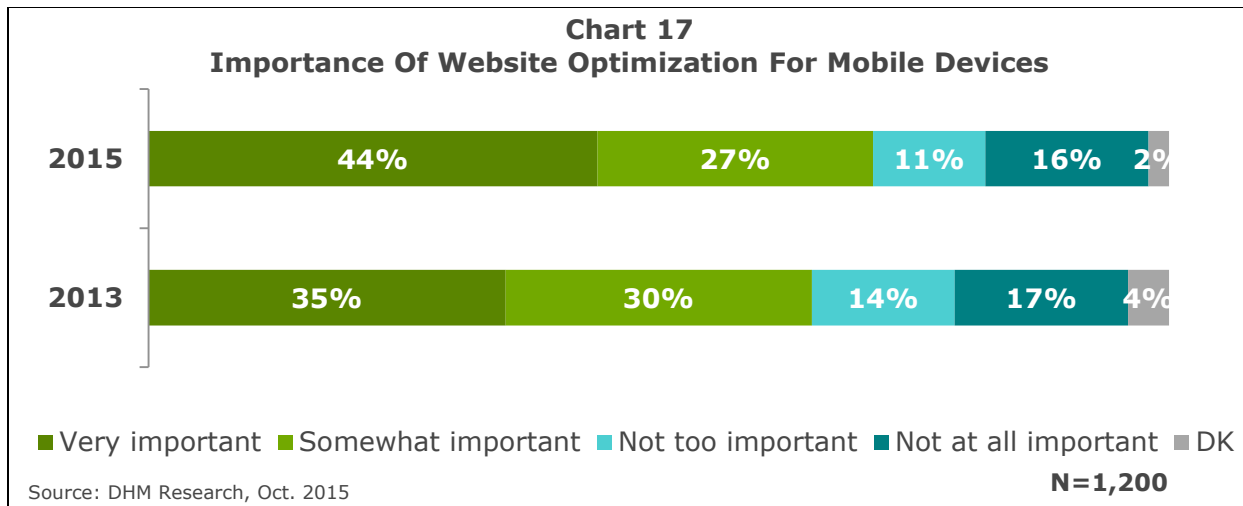
Table 4
Reasons Oregonians Disagree With Website Redesign

Response Category	2015 N=76	2013 N=87
State does not spend money wisely	35%	22%
Don't like computers/Internet/not everyone uses them	19%	--
Difficult to navigate/find what you're looking for	18%	--
Make it simple	12%	--
Too many services	3%	--
Healthcare site/past failures	3%	--
Website should be more user friendly	--	14%
Secure the website	--	6%
Dislike the government	--	5%
Rather have face to face communication	--	5%
Satisfied/no changes needed	--	4%
All other answers	2% or less	3% or less
None/nothing	0%	9%
Don't know	4%	1%

Source: DHM Research, Oct. 2015

Demographic Differences: There are no statistically significant differences.

Respondents were asked how important it is to them that State of Oregon websites be optimized to work on mobile devices, such as smartphones and tablets (Q29).

Chart 17
Importance Of Website Optimization For Mobile Devices

Year	Very important	Somewhat important	Not too important	Not at all important	DK
2015	44%	27%	11%	16%	2%
2013	35%	30%	14%	17%	4%

■Very important ■Somewhat important ■Not too important ■Not at all important ■DK

Source: DHM Research, Oct. 2015   **N=1,200**

Seven of 10 respondents (71%) said that mobile device optimization was either *very* (44%) or *somewhat important* (27%), for a combined increase of nine percentage points since 2013. But over one-quarter (27%) said that it was *not too* or *not at all important* to them. These results reflect the increased reliance on mobile devices seen over the past several years.
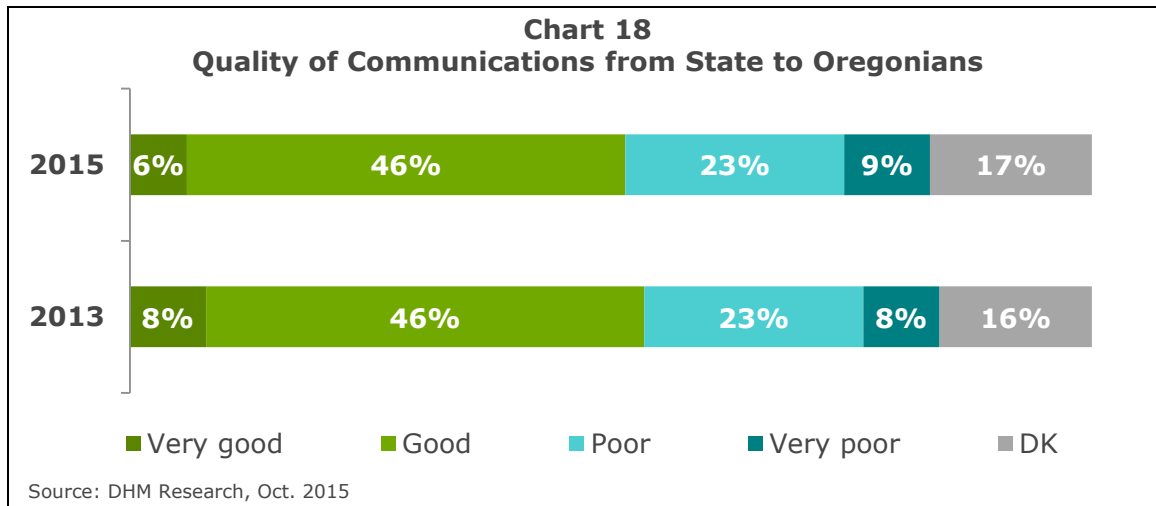
Demographic Differences: Again, the youngest residents showed their preference for new technologies. Eighty-five percent (85%) of those 18-34 said it was *very* or *somewhat important* that state websites be optimized for mobile devices. This was more than their older counterparts: 76% of those 35-54 said it was important, along with 54% of those 55 and older.

The importance of mobile optimization also increased with income. Residents making less than $25,000 (59%) were less likely to rate this as important than those making more ($25,000 to $49,999: 72%; $50,000 to $74,999: 76%; $75,000 or more: 77%).

Tri-County residents (74%) were most likely to rate it as important, compared to 72% for Willamette Valley residents and 67% for residents in other parts of the state.
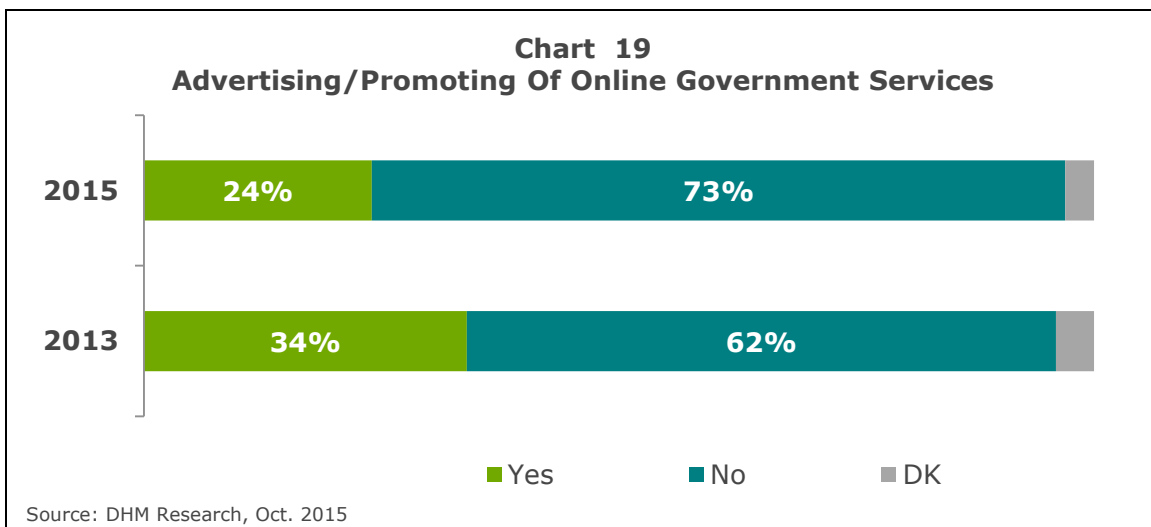
3.6 | State of Oregon General Communication

Respondents were asked how good of a job they felt the State of Oregon has done in communicating with Oregonians about what services are available online: very poor, poor, good, or very good (Q30).

Chart 18
Quality of Communications from State to Oregonians

	Very good	Good	Poor	Very poor	DK
2015	6%	46%	23%	9%	17%
2013	8%	46%	23%	8%	16%

Source: DHM Research, Oct. 2015

More than half (52%) felt that the State of Oregon did a *good* or *very good* job of communicating about services available online. Another 31% felt that the State of Oregon is doing a poor job, and 17% didn't know. Responses were very similar to those from 2013.

Demographic Differences: Consistent with the fact that younger residents (18-34) frequently found online services more important than their older counterparts, they were the age group most likely to rate the state's communication regarding these services as *very* or *somewhat good*, at 60%. Meanwhile, 53% of those 35-54 said the state's communication was good, along with 42% of residents 55 and over.

Respondents were asked whether they had seen any advertising or promotion about State of Oregon government services that are available online (Q31).

Chart 19
Advertising/Promoting Of Online Government Services

Year	Yes	No
2015	24%	73%
2013	34%	62%

■ Yes   ■ No   ■ DK

Source: DHM Research, Oct. 2015

Less than one-quarter (24%) of respondents have seen advertisements about state government services available online. This number is down 10% from 2013.

Demographic Differences: While younger residents (18-34) were more likely to have said the state did a good job of communicating about online services (Q30, above), here there were no statistically significant differences by age group. Roughly one-quarter of all residents had seen an advertisement about government services available online (18-34: 25%; 35-54: 24%; 55+: 23%).

Respondents were asked in an open-ended format where they had seen advertising or promotions if they had (Q32). Of the 24% who had seen advertising, most reported seeing it on:

Table 5
Where Oregonians See Online Services Advertised

Response Category	2015 N=292	2013 N=413
Television/Radio	45%	73%
Internet	21%	16%
Billboards	10%	12%
Newspapers	10%	11%
Mail/Emails	6%	--
All other answers	5% or less	3% or less
Don't know	1%	5%

Source: DHM Research, Oct. 2015

Demographic Differences: Older residents (55+) were more likely to have *seen or heard a television or radio ad* (64%) than younger residents (35-54: 42%; 18-34: 30%). The converse is true for *online websites*. About one-quarter of younger residents (18-35: 25%; 35-54: 26%) said they had seen an *online ad*, but only 12% of residents 55 and older had.
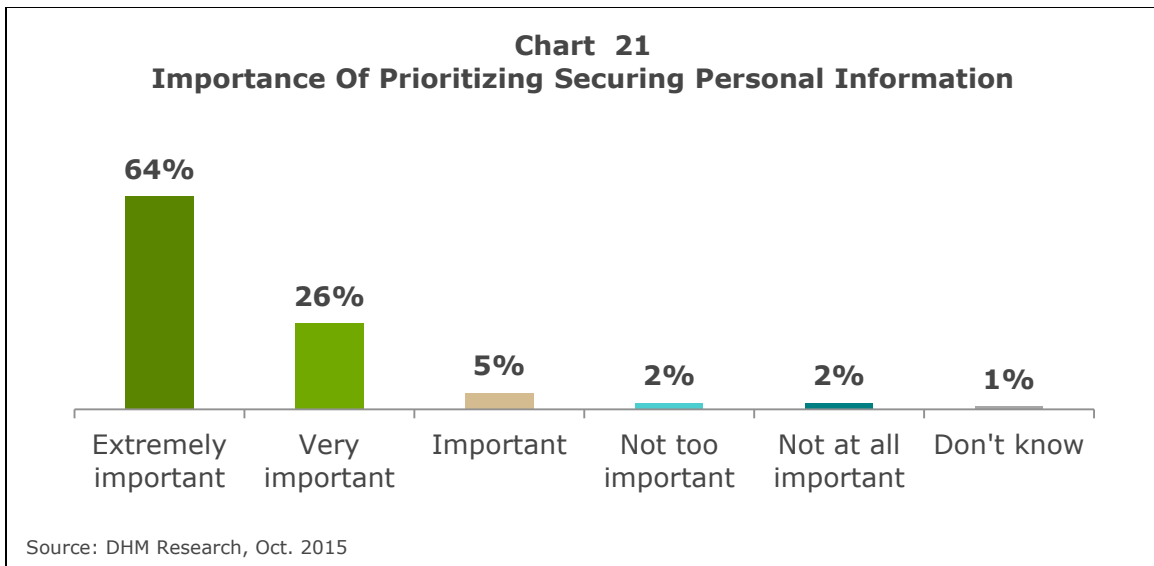
Respondents were provided with a brief explanation of the types of personal information the State of Oregon collects and stores and then asked how confident they were that their personal information was stored securely (Q33).

Chart 20
Confidence In Security Of Personal Information

Source: DHM Research, Oct. 2015
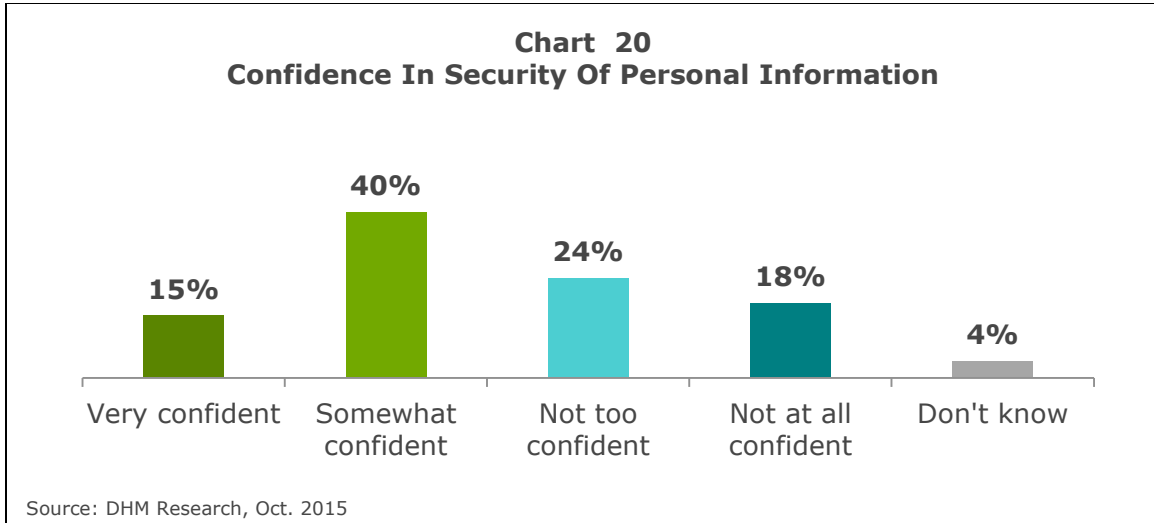
Most respondents were *very* (15%) or *somewhat confident* that their personal information was securely stored. But one-quarter (24%) were *not too confident*, and nearly two of 10 respondents (18%) said they were *not at all confident* in the state's security system.

Demographic Differences: Confidence in the state's security measures declined with age. While two-thirds of residents 18-34 (66%) were *very* or *somewhat confident* that the personal information held by the state is securely stored, just over half (54%) of residents 35-54 were confident. For residents 55 and over, less than half (44%) were confident.

Respondents were then asked how important it is that the State of Oregon prioritize its budget and staff resources to ensuring the security of personal information (Q34).

Chart 21
Importance Of Prioritizing Securing Personal Information

Category	Percentage
Extremely important	64%
Very important	26%
Important	5%
Not too important	2%
Not at all important	2%
Don't know	1%

Source: DHM Research, Oct. 2015

Nearly two-thirds (64%) of respondents said it was *extremely important* that the state allocate its resources in this way. Another 26% said it was *very important*.

Demographic Differences: There were no statistically significant demographic differences.

4. | QUESTIONNAIRE

E-Government Survey
October 15-19, 2015; Oregon General Population; Voter List + 20% Cell;
N=1,200 [Tri-County (N=400), Willamette Valley (N=400), Rest of State (N=400)]
12 Minutes, Margin of Error +/-2.8%
DHM Research

INTRODUCTION: Hello, my name is_____ from DHM Research, an independent, non-partisan opinion research firm. We are not calling to sell you anything. We are doing an important, scientific survey of Oregonians about some important state issues. May I please speak with [listed respondent]?

The survey will take about 10 minutes and I think you will find it interesting. You may be assured of complete confidentiality.
_____

1. Overall, when you have a question or something you need to do that requires contact with an Oregon state government agency, which method of contact do you find most convenient? **(Read list below. Rotate.)**

Response Category	2015 N=1200	2013 N=1200
Telephone call	34%	36%
Visit an office	7%	6%
Write a letter	4%	4%
Visit a website	35%	29%
Send an email	14%	15%
Other	1%	4%
(DON'T READ) Don't know	4%	7%

2. Do you have access to the internet through a computer, smart phone, or tablet device at your home? **(If 'yes' or 'don't know' skip to Q4)**

Response Category	2015 N=1200	2013 N=1200
Yes	91%	88%
No	9%	12%
(DON'T READ) Don't know	0%	0%

3. **(If No to Q2)** If you do not have access to the internet at your home from a computer, smartphone, or tablet, do you have access at a library, friend's house, the office, or somewhere else?

Response Category	2015 N=103	2013 N=149
Yes	57%	50%
No	43%	48%
(DON'T READ) Don't know	0%	2%

4. Have you heard of Oregon.gov? **(If 'no' skip to Q9)**

Response Category	2015 N=1010	2013 N=1126
Yes	87%	89%
No	12%	11%
(DON'T READ) Don't know	1%	0%

5. Have you ever visited Oregon.gov? **(If 'no' skip to Q8)**

Response Category	2015 N=1010	2013 N=997
Yes	70%	66%
No	28%	32%
(DON'T READ) Don't know	2%	2%

6. Have you visited Oregon.gov in the last year? **(If 'no' skip to Q8)**

Response Category	2015 N=705	2013 N=656
Yes	77%	73%
No	17%	22%
(DON'T READ) Don't know	5%	5%

7. **(If 'yes' to Q6)** Do you believe that Oregon.gov has become more useful since your earlier visits?

Response Category	2015 N=546	2013 N=482
Yes	47%	42%
No	24%	21%
(DON'T READ) Don't know/ only visited once	29%	37%

I'm going to ask you about visiting STATE of OREGON government agency websites. If you don't have access to the internet or use a device to connect to the internet, these next questions will go fast; (If needed: If you aren't sure a website is a State of Oregon site, answer to the best of your knowledge. State of Oregon websites are not the same as Metro/City/County websites.)

Have you ever visited a State of Oregon government agency website? **(Randomize Q8-Q15)**

Response Category	Yes	No	DK
8. To look for information, data or services?			
2015, N=1200	60%	39%	1%
2013, N=1200	59%	40%	1%
9. To complete a transaction online such as reserving a campsite, or renewing your car registration?			
2015, N=1200	43%	57%	0%
2013, N=1200	40%	59%	0%
10. To apply for a job with the State of Oregon?			
2015, N=1200	17%	82%	0%
2013, N=1200	20%	79%	1%
11. To access unemployment or welfare services?			
2015, N=1200	22%	78%	0%
2013, N=1200	23%	77%	1%
12. To access health insurance information?			
2015, N=1200	26%	73%	1%
2013, N=1200	20%	79%	1%
13. To pay fees or taxes?			
2015, N=1200	26%	73%	1%
2013, N=1200	24%	75%	2%
14. To receive small business assistance?			
2015, N=1200	7%	93%	0%
2013, N=1200	9%	90%	1%
15. To participant in a virtual public meeting or town hall?			
2015, N=1200	5%	95%	1%
2013, N=1200	8%	91%	1%

16. **(If 'yes' to any of Q8-Q15)** For what other reasons have you visited a State of Oregon government agency website? **(Open, probe for specifics)**

Response Category	2015 N=923	2013 N=912
Research/information/available resources-general	23%	13%
Licensing/permit renewal/requirements-general	8%	3%
DMV/vehicle registration/driver license	7%	6%
Health insurance/information regarding health	7%	3%
Outdoor recreation information/licensing (hunting, fishing, camping)	6%	4%
Jobs/unemployment	5%	6%
Tax information	4%	3%
Has not visited website	--	5%
Business license/registration	--	3%
All other responses	3% or less	2% or less
None/nothing	31%	24%
(DON'T READ) Don't know	2%	11%

17. Have you ever searched for a particular State of Oregon government service or information online but were unable to find it?

Response Category	2015 N=1200	2013 N=1200
a. Yes, I searched but was unable to find it	13%	12%
b. No, my search was successful	49%	42%
c. No, I never tried to search	36%	42%
(DON'T READ) Don't know	2%	4%

18. **(If 'yes' to Q17)** Do you recall what you were searching for? **(Open, probe for specifics)**

Response Category	2015 N=157	2013 N=139
Information-general	18%	5%
Laws/codes/planning/zoning	10%	2%
Taxes	6%	2%
Unemployment	5%	2%
Health insurance/health info	4%	6%
Department of Education	4%	--
State records	3%	--
Fishing License	3%	--
Senior services	2%	--
Social services/food services/housing	2%	4%
DMV	2%	4%
Political information	--	5%
Department of Human Services	--	3%
Transportation/road conditions/ODOT	--	3%
Park information	--	2%
Camp sites	--	2%
Personal information	--	2%
Attorney General	--	2%
Postal service/post office	--	2%
All other responses	5%	1% or less
(DON'T READ) No/Don't recall	36%	30%

19. **(Ask if 'a' or 'b' to Q17)** Would you say searching for Oregon state government agency contact information is very easy, fairly easy, fairly difficult, or very difficult?

Response Category	2015 N=742	2013 N=644
Very easy	22%	13%
Fairly easy	57%	69%
Fairly difficult	12%	11%
Very difficult	3%	2%
(DON'T READ) Don't know	6%	5%

Next, I will ask about ways that the State of Oregon can engage residents through online services. For each, please tell me if you personally feel that service is very important, somewhat important, not too important, or not at all important **(Randomize Q20-Q23)**

Response Category	Very important	Smwt important	Not too important	Not at all important	DK
20. The ability to visit a State of Oregon government agency website to provide your opinion or review other citizen opinions about a public policy or planning issue.					
2015 N=1200	34%	38%	14%	14%	1%
2013 N=1200	37%	37%	10%	12%	3%
21. The ability to provide virtual meetings or town halls so Oregon residents can attend and interact remotely.					
2015 N=1200	25%	38%	19%	18%	1%
2013 N=1200	28%	40%	14%	14%	3%
22. The ability to find public information and data about state finances, payroll, and services.					
2015 N=1200	35%	34%	15%	15%	2%
2013 N=1200	40%	34%	10%	13%	4%
23. The ability to get information and interact with government agencies through social media, such as Twitter and Facebook.					
2015 N=1200	11%	27%	24%	37%	1%
2013 N=1200	13%	29%	23%	32%	4%

25A. I'm now going to ask you about receiving State of Oregon government services on the web compared to the traditional mail, face-to-face, or telephone experience with State of Oregon government. If you have not received a State of Oregon government service online, just let me know now. **(If 'no' or 'don't know' skip to Q27)** (*The numbering for this question is as such to properly benchmark this data to the results of the 2013 study.)

Response Category	2015 N=1200	2013 N=1200
Received services online	39%	23%
Did not receive services online	57%	77%
Don't know	4%	0%

24. Is the speed of online delivery slower, faster, or about the same for you?

Response Category	2015 N=469	2013 N=270
Faster	54%	55%
Slower	6%	4%
About the same	36%	35%
(DON'T READ) Don't know	4%	6%

25. Is it less convenient, more convenient, or about the same for you?

Response Category	2015 N=469	2013 N=270
Less convenient	9%	4%
More convenient	62%	69%
About the same	26%	26%
(DON'T READ) Don't know	3%	1%

26. Is it less costly, more costly, or about the same for you?

Response Category	2015 N=469	2013 N=270
Less costly	48%	49%
More costly	3%	2%
About the same	45%	46%
(DON'T READ) Don't know	4%	4%

27. I will now read you a statement about the State of Oregon's websites.

The State of Oregon is beginning the process of redesigning its website and the websites of state departments. The overall aim is to have consistent elements across state agency websites so visitors know they are doing business with the state of Oregon. This includes using the Oregon.gov logo, search, location of contact information, and navigation. For each department website, the design will vary based on feedback from actual Oregon residents who regularly use the site. This is done to provide the best user experience to accomplish the tasks performed by most Oregonians. Ease of use is of primary importance, within the standard framework of the State's websites.

Based on this description, do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the way the State of Oregon is redesigning its website?

Response Category	2015 N=1200	2013 N=1200
Strongly agree	42%	34%
Somewhat agree	39%	45%
Somewhat disagree	3%	3%
Strongly disagree	3%	4%
(DON'T READ) Don't know	13%	14%

28. **(If somewhat/strongly disagree in Q27)** Why do you **(answer from Q27)**? **(Open)**

Response Category	2015 N=76	2013 N=87
State does not spend money wisely	35%	22%
Don't like computers/Internet/not everyone uses them	19%	--
Difficult to navigate/find what you're looking for	18%	--
Make it simple	12%	--
Too many services	3%	--
Healthcare site/past failures	3%	--
Website should be more user friendly	--	14%
Secure the website	--	6%
Dislike the government	--	5%
Rather have face to face communication	--	5%
Satisfied/no changes needed	--	4%
All other answers	2% or less	3% or less
None/nothing	0%	9%
(DON'T READ) Don't know	4%	1%

29. How important to you is it that State of Oregon websites be optimized to work on mobile devices, such as smartphones and tablets: very important, somewhat important, not too important, or not at all important?

Response Category	2015 N=1200	2013 N=1200
Very important	44%	35%
Somewhat important	27%	30%
Not too important	11%	14%
Not at all important	16%	17%
(DON'T READ) Don't know	2%	4%

30. How good of a job has the State of Oregon done in communicating with Oregonians about what services are available online: very poor, poor, good, or very good?

Response Category	2015 N=1200	2013 N=1200
Very poor	9%	8%
Poor	23%	23%
Good	46%	46%
Very good	6%	8%
(DON'T READ) Don't know	17%	16%

31. Have you seen any advertising or promotion about State of Oregon government services that are available online?

Response Category	2015 N=1200	2013 N=1200
Yes	24%	34%
No	73%	62%
(DON'T READ) Don't know	3%	4%

32. **(If 'yes' to Q32)** Where have you seen advertising or promotions? **(Open)**

Response Category	2015 N=292	2013 N=413
Television/Radio	45%	73%
Internet	21%	16%
Billboards	10%	12%
Newspapers	10%	11%
Mail/Emails	6%	--
All other answers	5% or less	3% or less
(DON'T READ) Don't know	1%	5%

We are just about finished, and before we go I'd like to ask you about security.

33. The State of Oregon collects and stores a great deal of personal information, including tax records, Social Security numbers, applications for benefits, and more. How confident are you that your personal information with the State of Oregon is stored securely and not vulnerable to hackers: very confident, somewhat confident, not too confident, or not at all confident?

Response Category	2015 N=1200
Very confident	15%
Somewhat confident	40%
Not too confident	24%
Not at all confident	18%
(DON'T READ) Don't know	4%

34. How important is it to you that the State of Oregon prioritize its budget and staff resources to ensuring that the personal information that it stores is secure and not vulnerable to hackers: extremely important, very important, important, not too important, or not at all important?

Response Category	2015 N=1200
Extremely important	64%
Very important	26%
Important	5%
Not too important	2%
Not at all important	2%
(DON'T READ) Don't know	1%

Demographics

35. County **(Do not ask, record from sample)**

Response Category	2015 N=1200	2013 N=1200
Tri-County	43%	43%
Willamette Valley	27%	27%
Rest of State	30%	30%

36. Zip code **(Do not ask, record from sample)**

37. Gender **(Do not ask, record from observation)**

	2015 N=1200	2013 N=1200
Male	48%	48%
Female	52%	52%

Age **(Do not ask, record from sample)**

	2015 N=1200	2013, N=1200
18-24	12%	12%
25-34	18%	19%
35-54	35%	35%
55-64	12%	12%
65+	23%	22%

38. What is your ethnicity?

Response Category	2015, N=1200	2013 N=1200
White/Caucasian	87%	79%
African American/Black	2%	2%
Hispanic/Latino	3%	3%
Asian/Pacific Islander	2%	3%
Native American/American Indian	1%	2%
Other	1%	4%
(DON'T READ) Refused	4%	7%

39. What is the highest level of education you have achieved?

Response Category	2015 N=1200	2013 N=1200
Less than high school	1%	3%
High school diploma	15%	20%
Some college	33%	29%
College degree	34%	29%
Graduate/professional school	15%	15%
(DON'T READ) Refused	2%	4%

40. Which category best describes your gross household income before taxes? Remember to include everyone living in your household. Your best estimate will do.

Response Category	2015 N=1200	2013 N=1200
Less than $25,000	11%	19%
$25,000 to less than $50,000	18%	22%
$50,000 to less than $75,000	20%	19%
$75,000 to less than $100,000	14%	12%
$100,000 to less than $150,000	8%	8%
$150,000 or more	4%	4%
(DON'T READ) Refused	25%	16%

41. CELL PHONE **(Do not ask, record from sample)**

Response Category	2015 N=1200	2013 N=1200
Yes	14%	21%
No	86%	79%