ICMA Survey Research

ICMA's Digital Use Survey Results-2013

Highlights

- 84% of respondents report the use of a smartphone.
- 54% show use of an Apple iOS, followed by 36% reporting an Android. Use of an Apple iOS has increased since the 2012 survey by close to ten percentage points.
- 75% report using the phone for business and pleasure.
- 50% of respondents use the smartphone to access the Internet more than 5 times per day.
- 88% report accessing apps on their smartphone.
- A majority of respondents indicate that they have an iPad.
- Although a majority (or at least 50%) uses these products for surfing the Internet, email, and reading books/magazines, there are some interesting age variations among U.S. members. The 18-24 and 35-54 age groups show respondents watching videos/movies online and using social media applications at a higher rate the members in the other age groups.
- Overall a strong majority prefer to access print magazines rather than electronic/digital.
- 67% prefer to access reports electronically/digitally.
- For professional purposes, LinkedIn is the only social media that a majority reports using (56%).
- Among all respondents, 80% report a social media presence.
- A majority of respondents indicated they would use a comprehensive ICMA app if one is developed.

Survey Methodology

The survey was conducted in September and October 2013. A total of 79,892 members and nonmembers received the electronic survey. Responses were received from 1,538 individuals. The breakdown is in Table 1.

Table 1 Survey Response

	No. sent survey	No. responding	% responding
U.S. members	6,717	449	7%
International members	329	29	9%
Prospective members	72,846	1,060	2%

Not all respondents answered the question about their age group. The distribution of respondents from those who did is in Table 2 below. In each instance, the number of respondents is highest in the 35-54 and the 55+ age groups. It is important to note that only 16 people responded in the 18-24 age group, so any percentages that are reported are based on 16, which is an extremely low number. Among the nonmembers, 69% are employed by local government. Nonmembers employed by local government comprise 45% of respondents. Twenty percent of respondents do not have a category in their record.

Table 2 Respondents by age group

			No. of respondents
Total	Age group	18-24	16
		25-34	128
		35-54	704
		55+	617
Member	Age group	18-24	7
		25-34	45
		35-54	188
		55+	197
International member	Age group	18-24	0
		25-34	2
		35-54	13
		55+	14
Prospective member	Age group	18-24	9
		25-34	81
		35-54	503
		55+	406

In the following tables, age groups are shown in those instances in which there is variation. In addition, differences in population size and geographic region are presented where meaningful. Because we do not have population size and geographic region for many of the nonmember respondents, the numbers reporting are smaller for population groups and geographic regions.

Smartphone Use

Overall, 84% of respondents report the use of a smartphone. Higher percentages of respondents in two of the population groups under 10,000 report that they do not use a smartphone (Table 3).

In 2012, 81% of survey respondents reported use of a smartphone.

Table 3 Use of Smartphone by Population Group

		Use of Smartphone				
		Total (A)	Yes (no.)	% of (A)	No (no.)	% of (A)
Population group	**Total**	**951**	**830**	**87.3%**	**121**	**12.7%**
	Over 1 million	30	26	86.7%	4	13.3%
	500,000-1,000,000	58	53	91.4%	5	8.6%
	250,000-499,999	68	58	85.3%	10	14.7%
	100,000-249,999	138	117	84.8%	21	15.2%
	50,000-99,999	173	158	91.3%	15	8.7%
	25,000-49,999	180	157	87.2%	23	12.8%
	10,000-24,999	163	148	90.8%	15	9.2%
	5,000-9,999	74	58	78.4%	16	21.6%
	2,500-4,999	38	33	86.8%	5	13.2%
	Under 2,500	29	22	75.9%	7	24.1%

In general, respondents in the age group 55+ show higher percentages not using a smartphone. The nonmember category shows respondents in the 35-54 age group with the highest percentage reporting that they do not use a smartphone (Table 4).

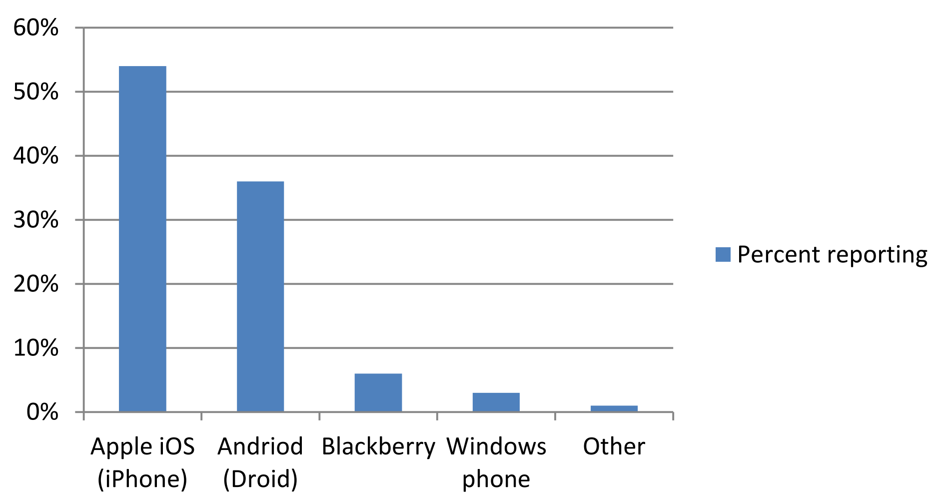
Table 4 Use of Smartphone by Age Group

		Smartphone					
		Total		Yes		No	
		Count	Row N %	Count	Row N %	Count	Row N %
Member	18-24	7	100.0%	6	85.7%	1	14.3%
	25-34	45	100.0%	45	100.0%	0	0.0%
	35-54	188	100.0%	184	97.9%	4	2.1%
	55+	197	100.0%	154	78.2%	43	21.8%
International member	18-24	0	0.0%	0	0.0%	0	0.0%
	25-34	2	100.0%	2	100.0%	0	0.0%
	35-54	13	100.0%	12	92.3%	1	7.7%
	55+	14	100.0%	13	92.9%	1	7.1%
Prospective member	18-24	9	100.0%	8	88.9%	1	11.1%
	25-34	81	100.0%	77	95.1%	4	4.9%
	35-54	503	100.0%	426	84.7%	77	15.3%
	55+	406	100.0%	312	76.8%	94	23.2%

Smartphone Operating System (OS)

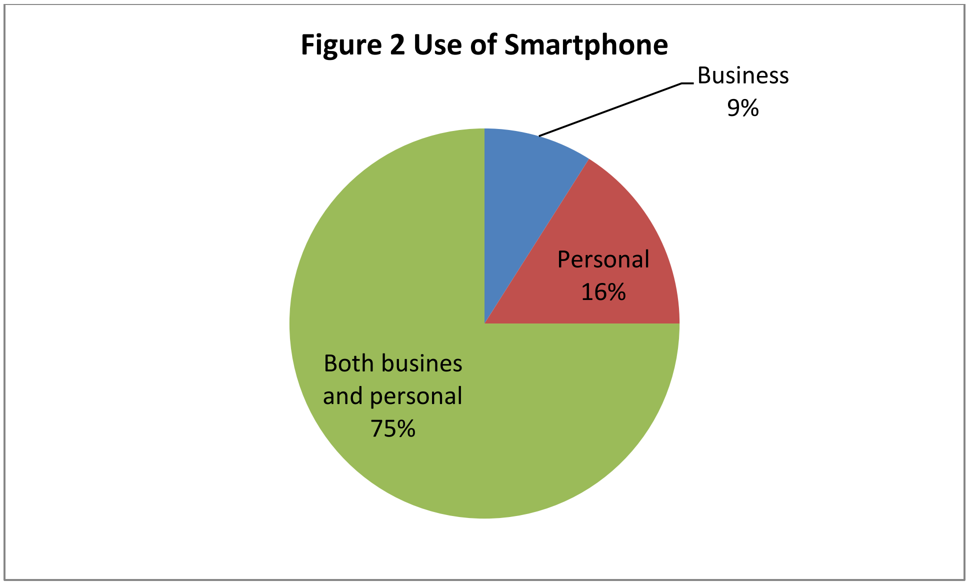
A majority (54%) shows use of an Apple iOS, followed by 36% reporting an Android (Figure 1). Use of an Apple iOS has increased since the 2012 survey by close to ten percentage points. There has been a slight increase in the percent reporting use of an Android system.

Figure 1 Smartphone Operating System



Use of the Smartphone

Overall, 75% report using the phone for business and pleasure (Figure 2). This percentage remains unchanged since the 2012 survey. There are no prominent variations by population group, geographic region or age group, except that nonmembers show slightly higher percentages reporting that they use their smartphone for personal use only.



How Often Respondents Use Smartphones to Access the Internet

Overall, 50% of respondents use the smartphone to access the Internet more than 5 times per day. In 2012, this figure was 40%, showing an increase of 10 percentage points. Results show little variation by population groups or geographic region, but there are differences seen among the age groups (Table 5). In general, respondents under 35 show higher percentages using their smartphones more than 5 times a day. (Apparently there are a few respondents who have a smartphone but do not use it.)

Table 5 How Often Respondents Use Smartphones to Access the Internet

			Total	More than 5 times a day	Fewer than 5 times a day	Several times a week	Rarely	Never
			Count	Row N %	Row N %	Row N %	Row N %	Row N %
Member	Age group	18-24	6	83.3%	16.7%	0.0%	0.0%	0.0%
		25-34	45	82.2%	15.6%	0.0%	2.2%	0.0%
		35-54	184	57.1%	23.4%	16.3%	3.3%	0.0%
		55+	153	40.5%	23.5%	22.2%	11.8%	2.0%
International member	Age group	18-24	0	0.0%	0.0%	0.0%	0.0%	0.0%
		25-34	2	100.0%	0.0%	0.0%	0.0%	0.0%
		35-54	12	66.7%	8.3%	25.0%	0.0%	0.0%
		55+	13	30.8%	30.8%	23.1%	15.4%	0.0%
Prospective member	Age group	18-24	8	62.5%	25.0%	12.5%	0.0%	0.0%
		25-34	77	80.5%	11.7%	6.5%	1.3%	0.0%
		35-54	425	48.5%	26.8%	16.7%	7.8%	.2%
		55+	311	35.7%	23.2%	25.7%	14.5%	1.0%

Apps on Smartphones

Overall, 88% report accessing apps on their smartphone, with 90% or more of ICMA U.S. members doing so, regardless of age group (not shown). Among the 23 international members who answered the question, the highest percentages reporting use of apps are in the two age groups 35 and over. Among nonmembers, there is a noticeable decrease in the percentage reporting use of apps in the 55+ age group.

In 2012, 85% reported accessing apps on their smartphone, so there has been a slight increase since 2012.

Mobile Version of icma.org on Smartphone

Overall, only 12% of respondents report that they have accessed the mobile version of icma.org on their smartphone. Among ICMA U.S. members, those reporting in the age groups 25-34 and 35-54 show the highest use of the mobile version (almost 30%) (Table 6). Although there is quite a bit of variation among respondents by population group and geographic region, the only trend that emerges is that those in the Northeast region show the highest percentage (almost 20%) reporting use of the mobile version of icma.org, compared with the overall 12%.

Not surprisingly, in comparing the use of the mobile version by members and nonmembers, nonmembers show only 7% reporting use, compared with 23% of members reporting use.

Table 6 Accessed Mobile Version of icma.org on Smartphone

			Accessed icma.org mobile					
			Total		Yes		No	
			Count	Row N %	Count	Row N %	Count	Row N %
Member	Age group	18-24	6	100.0%	1	16.7%	5	83.3%
		25-34	39	100.0%	11	28.2%	28	71.8%
		35-54	179	100.0%	50	27.9%	129	72.1%
		55+	152	100.0%	24	15.8%	128	84.2%
International member	Age group	18-24	0	0.0%	0	0.0%	0	0.0%
		25-34	2	100.0%	1	50.0%	1	50.0%
		35-54	12	100.0%	2	16.7%	10	83.3%
		55+	13	100.0%	3	23.1%	10	76.9%
Prospective member	Age group	18-24	8	100.0%	1	12.5%	7	87.5%
		25-34	72	100.0%	7	9.7%	65	90.3%
		35-54	414	100.0%	29	7.0%	385	93.0%
		55+	303	100.0%	17	5.6%	286	94.4%

Respondents Who Do Not Use a Smartphone: Plans for Use

Among the 16% of respondents who do not use a smartphone,

- 13% plan to use a smartphone in the next year
- 47% do not plan to use a smartphone in the next year
- 41% are not sure whether they will use a smartphone in the next year

Among ICMA members, those who do not currently use a smartphone tend to be in the 55+ age group, and they generally report that they do not plan to use one in the next year. Nonmembers comprise the largest group answering this question (192), and they show the highest percentages in the “no” or “not sure” categories.

Use of Tablets and E-readers

A majority of respondents indicate that they have an iPad (Table 7). The iPad and Android Tablet were evenly split in the 18-24 age group of U.S. members, but otherwise, the iPad was reported by much higher percentages of respondents in all age groups. Results also show that the highest percentage of respondents who plan to have one of these products in the next year, plan to have an iPad.

Those who checked "other" and described the product wrote in different types of Nooks, iPads, and Microsoft Surface.

In 2012, 44% reported an iPad and 10%, an Android Tablet. Results show that use of both has increased.

Table 7 Use of Tablets and E-readers

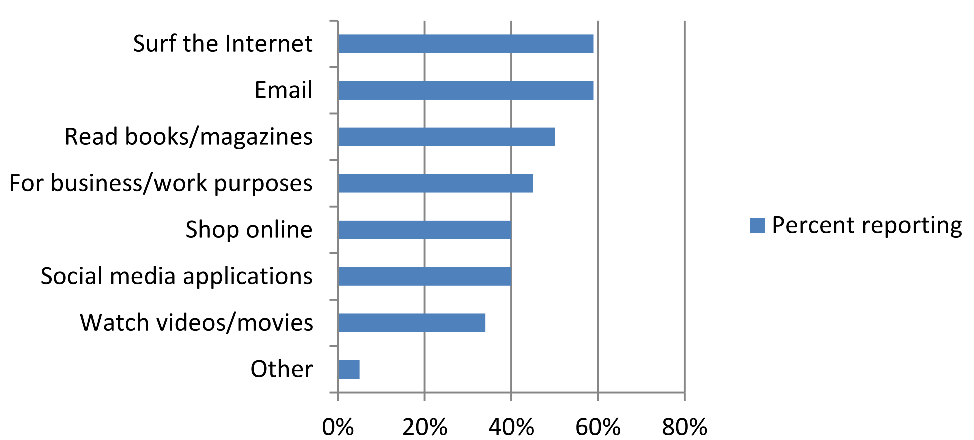
Product	Total reporting (A)	I have this product (% of A)	I do not have but plan to have in the next year (% of A)	I do not have and do not plan to have in the next year (% of A)
iPad	1,435	53%	12%	36%
Android Tablet (with Internet access)	1,268	15%	9%	76%
Kindle Fire (with Internet access)	1,236	14%	5%	82%
Kindle (no Internet access except for reading material)	1,239	17%	2%	81%
Nook tablet (with Internet access)	1,220	6%	3%	92%
Nook Color (no Internet access except for reading material)	1,201	3%	2%	95%
Other	762	9%	4%	87%

How Tablets and E-readers Are Used

Although a majority (or at least 50%) uses these products for surfing the Internet, email, and reading books/magazines (Figure 3), there are some interesting age variations among U.S. members. The 18-24 and 35-54 age groups show respondents watching videos/movies online and using social media applications at a higher rate the members in the other age groups.

Compared to the results of the 2012 survey, the percentages reporting use have increased for each type of use.

Figure 3 How Tablets and E-readers Are Used



The respondents who reported other uses indicated that they use them for games, to take pictures, to take notes, and to listen to music.

Preferred Method of Accessing Content

Articles

Overall a strong majority prefer to access electronic articles (Table 8). Interestingly enough, it is the youngest age group and the age group 55+ that show the highest percentages preferring print to electronic, although certainly not a majority in either case.

Table 8 Preferred Method for Accessing Articles

		Articles					
		Total		Print		Electronic/digital	
		Count	Row N %	Count	Row N %	Count	Row N %
Member Type	Total	1461	100.0%	316	21.6%	1145	78.4%
	Member	432	100.0%	112	25.9%	320	74.1%
	International member	28	100.0%	4	14.3%	24	85.7%
	Prospective member	1001	100.0%	200	20.0%	801	80.0%

Magazines

Overall a strong majority prefer to access print magazines (Table 9). This was true in 2012 as well, although the percentage was 61% at that time, and it has now increased to 66%. Again, it is the youngest age group and the age group 55+ that show the highest percentages preferring print to electronic.

Table 9 Preferred Method for Accessing Magazines

		Magazines					
		Total		Print		Electronic/digital	
		Count	Row N %	Count	Row N %	Count	Row N %
Member Type	Total	1451	100.0%	950	65.5%	501	34.5%
	Member	434	100.0%	299	68.9%	135	31.1%
	International member	29	100.0%	16	55.2%	13	44.8%
	Prospective member	988	100.0%	635	64.3%	353	35.7%

Reports

The youngest age group and the age group 55+ show the highest percentages preferring print reports to electronic, although overall 67% prefer to access reports electronically (Table 10).

Table 10 Preferred Method for Accessing Reports

		Reports					
		Total		Print		Electronic/digital	
		Count	Row N %	Count	Row N %	Count	Row N %
Member Type	Total	1455	100.0%	481	33.1%	974	66.9%
	Member	433	100.0%	170	39.3%	263	60.7%
	International member	29	100.0%	7	24.1%	22	75.9%
	Prospective member	993	100.0%	304	30.6%	689	69.4%

Books

A strong majority prefer to access books in print (Table 11). It may be that people view reading magazines and books differently than reading reports and articles. Reports and articles may be considered more work related, and magazines and books read more often in leisure time.

Table 11 Preferred Method for Accessing Books

			Books					
			Total		Print		Electronic/digital	
			Count	Row N %	Count	Row N %	Count	Row N %
Member	Age group	Total	426	100.0%	284	66.7%	142	33.3%
		18-24	7	100.0%	6	85.7%	1	14.3%
		25-34	43	100.0%	27	62.8%	16	37.2%
		35-54	184	100.0%	115	62.5%	69	37.5%
		55+	192	100.0%	136	70.8%	56	29.2%
International member	Age group	Total	29	100.0%	18	62.1%	11	37.9%
		18-24	0	0.0%	0	0.0%	0	0.0%
		25-34	2	100.0%	1	50.0%	1	50.0%
		35-54	13	100.0%	8	61.5%	5	38.5%
		55+	14	100.0%	9	64.3%	5	35.7%
Prospective member	Age group	Total	960	100.0%	603	62.8%	357	37.2%
		18-24	9	100.0%	5	55.6%	4	44.4%
		25-34	79	100.0%	53	67.1%	26	32.9%
		35-54	482	100.0%	291	60.4%	191	39.6%
		55+	390	100.0%	254	65.1%	136	34.9%

Use of Social Media Platforms

The table below shows the aggregate responses for each type of social media. There are only two instances in which a majority report using any of the social media listed for personal purposes: Facebook's shows 62% and YouTube shows 64% (Table 12). For professional purposes, the only social media that a majority uses is LinkedIn (56%). Many of the other forms of social media show a majority reporting that they do not use and do not plan to use the media. Twenty-two percent report that they plan to use the ICMA Knowledge Network.

Not all of the list below was covered in the 2012 survey, but those that were repeated in 2013 show similar percentages, with the a few exceptions. Where the social media platforms were covered in both years, the 2012 results are shown to the right of the 2013 results (Table 12). There have been some increases, and a noticeable decrease of 11 percentage points in the percentage reporting use of the Knowledge Network for professional purposes. In 2012, 37% of respondents were ICMA members. In 2013, 31% are ICMA members. This may help explain the decrease in percentage reporting for use of the Knowledge Network.

Table 12 Use of Social Media Platforms

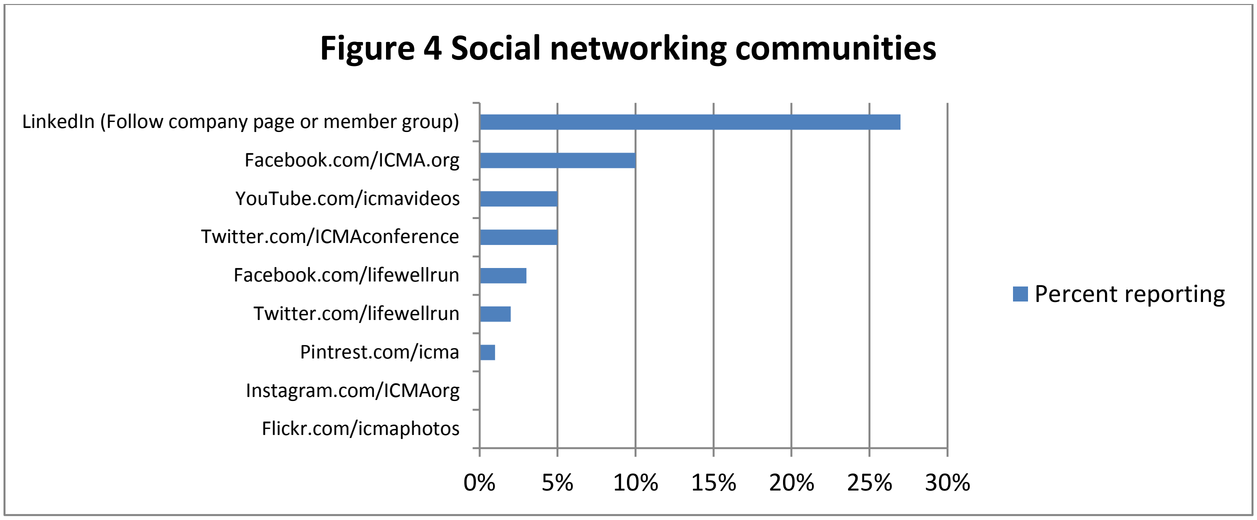
Platform	I use for personal purposes (%) 2013/2012	I use for professional purposes (%) 2013/2012	I plan to use (%)	I do not use and do not plan to use (%)
ICMA Knowledge Network	7%/8%	37%/48%	22%	26%
Facebook	62%/60%	20%/24%	2%	26%
LinkedIn	20%/21%	56%/53%	4%	24%
Twitter	20%/18%	18%/18%	6%	52%
Flickr	8%/10%	4%/5%	4%	71%
YouTube	64%/57%	31%/29%	3%	18%
Pinterest	20%/14%	3%/3%	5%	60%
Instagram	13%	3%	6%	64%
Google+	33%	21%	6%	42%
Google Hangouts	6%	3%	5%	72%
Google Circles	7%	3%	4%	71%
Google Groups	7%/16%	7%/15%	5%	67%
GovLoop	1%/2%	6%/9%	75	71%
FourSquare	4%	1%	3%	76%
Blogs	21%	21%	4%	51%
Myspace	2%	1%	2%	80%
Yahoo Groups	10%/13%	5%/8%	2%	69%
MeetUp.com	5%/2%	3%/2%	3%	75%
Other	1%	1%	1%	33%

These percentages will not add up to 100 because not everyone answered each question and some people checked personal purposes and professional purposes. The base used for the calculations is the total number of respondents.

Social Networking Communities

The survey asked respondents to identify in which ICMA social networking communities they participate. One noticeable, albeit small trend, is that the respondents in the age groups 35-54 and 55+ are the ones who are participating in the Facebook.com/lifewellrun community. This is also true for respondents in local governments under 500,000 population.

Larger local governments, those 500,000 and above, participate in ICMA's LinkedIn community, but for the large localities that's the extent of social networking communities covered in the survey . Smaller local governments, those under 250,000 appear to use LinkedIn, Facebook, and YouTube more than other social media options.



Social Media Presence

Among all respondents, 80% report a social media presence. The question asked about local government social media presence, but not all respondents are employed by local government, so the data arrayed by population group and geographic region show slightly different percentages that the overall 80% (Table 13). The local governments below 100,000 population begin to show a decrease in the percentages reporting a social media presence. This decrease continues to the smallest population group (under 2,500), which shows only 43% reporting affirmatively.

The local governments responding in the Northeast region also show the smallest percentage among the regions reporting a social media presence. The Northeast also has a higher percentage of small towns than other regions typically do.

Table 13 Government Social Media Presence

		Government has social media presence					
		Total		Yes		No	
		Count	Row N %	Count	Row N %	Count	Row N %
Population group	Over 1 million	29	100.0%	27	93.1%	2	6.9%
	500,000-1,000,000	55	100.0%	52	94.5%	3	5.5%
	250,000-499,999	64	100.0%	59	92.2%	5	7.8%
	100,000-249,999	131	100.0%	124	94.7%	7	5.3%
	50,000-99,999	168	100.0%	148	88.1%	20	11.9%
	25,000-49,999	172	100.0%	139	80.8%	33	19.2%
	10,000-24,999	157	100.0%	125	79.6%	32	20.4%
	5,000-9,999	72	100.0%	51	70.8%	21	29.2%
	2,500-4,999	36	100.0%	25	69.4%	11	30.6%
	Under 2,500	28	100.0%	12	42.9%	16	57.1%
	Total	**912**	**100.0%**	**762**	**83.6%**	**150**	**16.4%**
Geographic region	Northeast	73	100.0%	53	72.6%	20	27.4%
	North Central	233	100.0%	193	82.8%	40	17.2%
	South	317	100.0%	268	84.5%	49	15.5%
	West	276	100.0%	235	85.1%	41	14.9%
	Total	**899**	**100.0%**	**749**	**83.3%**	**150**	**16.7%**

Use of Mobile Apps If Developed by ICMA

Overall, the highest combined percentage reporting that they are "very likely" or "likely" to use a mobile app if developed by ICMA identified a "comprehensive ICMA mobile app" (49%) (Table 14). Among ICMA members, however, the data for all of the apps listed show some interesting variations (Table 15).

Table 14 Use of Mobile Apps If Developed by ICMA

App	Total (A)	Very likely (% of A)	Likely (% of A)	Neutral (% of A)	Unlikely (% of A)	Very unlikely (% of A)
Mobile app for *PM Magazine*	1,425	15%	24%	26%	16%	19%
Mobile app for the Knowledge Network	1,416	16%	27%	26%	13%	17%
Mobile app for ICMA events	1,419	18%	25%	27%	13%	18%
Comprehensive ICMA mobile app for all of the above	1,430	21%	28%	26%	10%	16%

Mobile app for PM Magazine

Among ICMA U.S. members, 53% overall indicated they would be "very likely" or "likely" to use a mobile app for *PM Magazine,* and among members in the 25-54 age group, slightly over 60% indicate they would use a PM app. This is also true for International members.

Mobile app for the Knowledge Network

For the Knowledge Network app, barely 50% of ICMA members overall would use the app, but 61% of those in the 34-54 age group would use a Knowledge Network app as would 69% of International members.

Mobile app for Events

Results show that 66% of U.S. members would use an events app, regardless of age group. More than 70% of those in the 25-54 age group indicate they would use an event app. Among International members, 64% of those in the 55+ age group would use it—the highest percentage among International members.

Comprehensive ICMA app

In every age group except those 55+, approximately 70% of U.S. ICMA members indicated they would use a comprehensive ICMA app. Among International members, this was true of all age groups except those 18-24 because no one answered the question in that group. Even among nonmembers the percentage who would use a comprehensive ICMA app shows that a majority in each age group except those 55+ would use a comprehensive app.

Table 15 Comprehensive ICMA Mobile App

			Comprehensive ICMA App											
			Total		Very likely		Likely		Neutral		Unlikely		Very unlikely	
			No.	Row N %	No.	Row N %	No.	Row N %	No.	Row N %	No.	Row N %	No.	Row N %
Member	Age group	Total	433	100%	141	32.6%	120	27.7%	96	22.2%	29	6.7%	47	10.9%
		18-24	7	100%	4	57.1%	1	14.3%	2	28.6%	0	0.0%	0	0.0%
		25-34	45	100%	18	40.0%	14	31.1%	6	13.3%	3	6.7%	4	8.9%
		35-54	185	100%	74	40.0%	57	30.8%	35	18.9%	11	5.9%	8	4.3%
		55+	196	100%	45	23.0%	48	24.5%	53	27.0%	15	7.7%	35	17.9%
International member	Age group	Total	29	100%	10	34.5%	11	37.9%	5	17.2%	2	6.9%	1	3.4%
		18-24	0	0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
		25-34	2	100%	1	50.0%	1	50.0%	0	0.0%	0	0.0%	0	0.0%
		35-54	13	100%	4	30.8%	4	30.8%	3	23.1%	1	7.7%	1	7.7%
		55+	14	100%	5	35.7%	6	42.9%	2	14.3%	1	7.1%	0	0.0%
Prospective member	Age group	Total	959	100%	154	16.1%	267	27.8%	259	27.0%	105	10.9%	174	18.1%
		18-24	9	100%	4	44.4%	2	22.2%	2	22.2%	0	0.0%	1	11.1%
		25-34	75	100%	19	25.3%	21	28.0%	21	28.0%	6	8.0%	8	10.7%
		35-54	492	100%	88	17.9%	157	31.9%	114	23.2%	53	10.8%	80	16.3%
		55+	383	100%	43	11.2%	87	22.7%	122	31.9%	46	12.0%	85	22.2%

ICMA Conference App

Only 11% reported that they had downloaded last year's conference app, and only 7% had downloaded this year's conference app, but the survey was conducted well in advance of the time when attendees would be downloading the app.