AOL Government Mobility Study

Released: July 31, 2012
Background

- An online survey of 300 federal government mobile technology decision makers and influencers:
  - 178 federal civilian, independent agency, intelligence, legislative participants
  - 122 Department of Defense participants, representing all branches of the military

- All involved with agency mobile technology: Strategy/policy (56%), deployment initiatives (49%), purchasing (36%), system support (34%), Web/app design (18%).

(In this study, mobile technologies include the device hardware and software for laptops, netbooks, smartphones, tablets and two-way radios.)
Agencies are making progress in enabling employees with mobile technologies

One-third of respondents state that their agencies are leading the charge
Six in ten are less progressive, but have begun the journey

In your opinion, which of the following best describes your agency or department’s progression in enabling employees with mobile technologies?
Cost savings expected through increased productivity

Nearly all think that productivity and cost savings will result from mobile technology.
Enabling employees to work on the go will save hours

Half think that they could recapture or redeploy at least seven hours per week if fully enabled to work mobilly.

Average hours recaptured or redeployed per week

- More than 12 hours: 19%
- 11-12 hours: 4%
- 9-10 hours: 11%
- 7-8 hours: 15%
- 5-6 hours: 16%
- 3-4 hours: 24%
- 1-2 hours: 10%
- Less than 1 hour: 2%
- None: 1%

Q: On average, how many hours a week do you estimate employees like yourself can recapture or redeploy if fully enabled to work mobilly?
Provisioning cost savings possible through transition to mobile technology

Federal civilians are more likely than Defense employees to mention real estate costs and net hardware costs as potential areas of cost savings.

- Real estate/facilities costs: 57%
- Net hardware costs per employee: 49%
- Software licensing costs per employee: 42%
- Help desk/support costs: 35%
- Reduced training costs: 27%

15% believe there are no aspects of mobility that would result in cost savings relative to product provisioning and support.

Note: Multiple responses allowed. Percentages will add to >100%.

Now thinking from a product provisioning and support point of view, which aspects of mobility do you believe show the greatest potential for cost savings?
IT budget savings also expected by most

While nearly one-third are unsure, the plurality expect IT budget savings of 10%-29% annually over time.

**Annual IT budget savings expected**

- 50% or more: 3%
- 40%-49%: 1%
- 30%-39%: 7%
- 20%-29%: 17%
- 10%-19%: 26%
- 5%-9%: 11%
- Less than 5%: 5%
- Unsure: 30%

What do you estimate would be the annual IT budget savings your agency might achieve over time by moving to a mobile strategy that reduces hardware, software licensing and support costs?
Cost increases inevitable with mobile transition

The greatest anticipated cost in transitioning to mobile technology is wireless and carrier subscriptions

Wireless and carrier subscriptions: 72%
Number and cost for devices per employee: 68%
Securing multiple mobile devices and platforms: 62%
Help desk/support for mobile services: 61%

Note: Multiple responses allowed. Percentages will add to >100%.

In which areas would you expect to see cost increases as a result of transitioning to mobile technology for employees?
More progressive agencies report more budget for mobility in FY13

Almost all agencies identified as more progressive have at least some budget allocated for mobile technology.

- **More Progressive**
  - No budget allocated: 2%
  - Less budget (1%-9%): 33%
  - More budget (10% or more): 65%

- **Less Progressive**
  - No budget allocated: 11%
  - Less budget (1%-9%): 62%
  - More budget (10% or more): 28%

*Approximately what proportion of your agency’s IT budget is expected to be allocated to mobile devices and services in FY13 and FY14?*
Less progressive agencies begin to catch up in the budget race in FY14

While all report having more budget for mobile technology in FY14, more progressive agencies still outpace less progressive ones.
Mobile budget is lacking for most and will need significant increases to meet needs

<table>
<thead>
<tr>
<th>Those who have adopted some mobile technology</th>
<th>Budget Sufficient to Meet Needs?</th>
<th>How much would budget need to increase to meet needs?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>40% Yes</td>
<td>54% Significantly</td>
</tr>
<tr>
<td></td>
<td>60% No</td>
<td>43% Somewhat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4% Slightly</td>
</tr>
</tbody>
</table>

Q Is the budget allocated to mobile technology sufficient to meet your agency or department’s need? Approximately how much will the budget for mobile technology need to increase to meet needs?

n=146

n=82
- Barriers to Deployment
- Where More Support Is Needed
- Deploying Mobile Apps/Websites
Security is the greatest barrier to supporting mobile technology, especially to Defense employees

Other than security and budget, there is little differentiation between other barriers

Security: 70%
Budget concerns: 48%
Privacy concerns: 28%
Compliance and legal concerns: 27%
Policy concerns: 26%
Lack of understanding/commitment from senior management: 25%

Note: Multiple responses allowed, percentages will add to >100%. Only barriers with >25% of mentions are shown.

What do you believe are the **top three** barriers to supporting mobility technology and services for employees and citizens/constituents?
Agencies are most concerned about data being compromised

Three-quarters see potential data compromise as a security challenge

Security Challenges

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>The possibility of data being compromised</td>
<td>77%</td>
</tr>
<tr>
<td>The need to secure both the application and the device</td>
<td>60%</td>
</tr>
<tr>
<td>Standards, policy and identity management/authentication</td>
<td>58%</td>
</tr>
<tr>
<td>Employees being allowed to bring their own devices (BYOD)</td>
<td>51%</td>
</tr>
<tr>
<td>The possibility of losing data</td>
<td>45%</td>
</tr>
<tr>
<td></td>
<td>42%</td>
</tr>
</tbody>
</table>

Note: Multiple responses allowed. Percentages will add to >100%. Only challenges with >20% mentions shown.

What aspects of mobile technology security are challenging for your agency or department?
The plurality would like roadmaps, less want more actual policy

Employees also tend to want better vehicles to acquire and share mobility tools and support

Less than one-third
- 31% More policy available at the federal level

More than one-third
- 37% Improved inter-agency collaboration
- 38% Reusable standards in architecture
- 38% Relaxation of agency policies

About 40%
- 44% More guidance or roadmaps
- 43% Sharing of tools and support
- 41% Better acquisition vehicles

6% say that they do not need any additional support or information in order to facilitate mobile strategy decisions.

Note: Multiple responses allowed. Percentages will add to >100%.

What support or information, aside from additional budget, do you feel your agency needs in order to facilitate mobility strategy decisions across your entire agency?
Many best practices involve increasing investments and employee engagement.

- Increasing investments in mobility: 28%
- Increasing employee engagement: 19%
- Promoting a culture of telework: 11%
- Making mobile technology available to more employees: 9%
- Security research and practices: 9%
- Other: 26%

**SELECT COMMENTS**

Laptops for all, cell phones for most.

Allowing employees to make choices, within reason.

Q: What is your agency or department doing today around mobility that you believe should be considered a best practice that other agencies could benefit from?
Agencies tend to use their own IT staff to develop mobile websites and apps

Developer of Agency Mobile Sites and Apps

- Government IT staff: 72%
- Government non-IT staff: 25%
- A third party through an existing contract: 25%
- Contracted for a new mobile task order: 16%
- Other: 7%

Other includes:
- Challenge.gov
- Given the application for free
- Developed by a family member

Note: Multiple responses allowed. Percentages will add to >100%.

How was your agency’s mobile website or application (app) developed?
Recent deployment of citizen and employee mobile apps and websites is strong

Nearly two-thirds have either deployed an app or site or plan to in the next 12-18 months

Just over one-third do not plan to deploy employee or citizen apps or mobile sites, with the Department of Defense least likely to do so

<table>
<thead>
<tr>
<th>For Citizens</th>
<th>Deployed an app or mobile website in past year</th>
<th>Have not yet, but plan to deploy in the next 12-18 months</th>
<th>Do no plan to deploy an app or mobile website</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>45%</td>
<td>20%</td>
<td>35%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>For Employees</th>
<th>Deployed an app or mobile website in past year</th>
<th>Have not yet, but plan to deploy in the next 12-18 months</th>
<th>Do no plan to deploy an app or mobile website</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>42%</td>
<td>23%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Q: Has your agency or department deployed a mobile website or application (app) for smartphones or tablets in the past 12 months that provides a distinct function to help employees perform their job (for example, logging travel miles or calculation per diems)/ citizens/constituents to use for interacting with your agency (for example, submitting or tracking forms)?
Agencies are deploying more employee focused apps than mobile websites

Deployment of citizen-specific mobile sites and apps mirror that of agency personnel sites and apps.

Has your agency or department deployed a mobile website or application (app) for smartphones or tablets in the past 12 months that provides a distinct function to help employees perform their job (for example, logging travel miles or calculation per diems)/citizens/constituents to use for interacting with your agency (for example, submitting or tracking forms)?
Majority are unsure how performance is measured for sites and apps

Only about one-third track the performance of mobile sites and apps

Mobile Websites
- 56% Unsure
- 31% Use metrics to gauge mobile site/app performance
- 14% Have mobile sites/apps, but do not use metrics

Applications (Apps)
- 57% Unsure
- 29% Use metrics to gauge mobile site/app performance
- 14% Have mobile sites/apps, but do not use metrics

What metrics does your agency use to gauge the performance of mobile applications (apps) and mobile optimized websites?
Page views and downloads are the most used mobile tech performance metrics

Civilian and Defense respondents are equally likely to use all metrics

<table>
<thead>
<tr>
<th>Mobile Websites</th>
<th>Mobile Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page views</td>
<td>Downloads</td>
</tr>
<tr>
<td></td>
<td>61%</td>
</tr>
<tr>
<td>Downloads</td>
<td>Page views</td>
</tr>
<tr>
<td></td>
<td>53%</td>
</tr>
<tr>
<td>Time on site</td>
<td>Repeat usage</td>
</tr>
<tr>
<td></td>
<td>47%</td>
</tr>
<tr>
<td>Repeat usage</td>
<td>Unique visitors</td>
</tr>
<tr>
<td></td>
<td>47%</td>
</tr>
<tr>
<td>Unique visitors</td>
<td>Time on site</td>
</tr>
<tr>
<td></td>
<td>43%</td>
</tr>
<tr>
<td>Click throughs</td>
<td>Click throughs</td>
</tr>
<tr>
<td></td>
<td>30%</td>
</tr>
<tr>
<td></td>
<td>25%</td>
</tr>
</tbody>
</table>

N=74
N=68

Note: Multiple responses allowed. Percentages will add to >100%.
Dept. of State, TSA and OPM apps cited most as citizen services delivery models

The majority could not name any app, but of those who did, government apps and some private apps were mentioned

- Private app: 7%
- Govt app: 16%
- No app named: 77%

Which three government mobile applications (apps) come to mind first as good models for how your agency could deliver services to citizens/constituents? (open-end)
The Outlook for Government Mobile Technology
Currently, at least some employees primarily use all types of mobile devices

Desks and laptops have the highest rates of overall usage.
Tables expected to see the most growth in use over the next year and a half

All other device use is expected to remain relatively stable

Total Percent Change in Device Usage Over the Next 12-18 Months
Laptops currently used by most

Forty-five percent report that half or more agency employees currently rely on laptops to do their work.

More progressive agencies are more likely to rely on laptops.

**Current Laptop Usage**

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4%</td>
<td>None</td>
</tr>
<tr>
<td>51%</td>
<td>Less than 50%</td>
</tr>
<tr>
<td>45%</td>
<td>50% or more</td>
</tr>
</tbody>
</table>

Questions:

Approximately what proportion of your agency’s employees rely primarily on each of the following types of devices to do their work?
Laptops expected to see incremental increase in primary use

The proportion of employees relying primarily on laptops is expected to increase slightly over the next 12-18 months

More progressive agencies are more likely to rely on laptops in the future

<table>
<thead>
<tr>
<th>Currently</th>
<th>12-18 months from now</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>4%</td>
</tr>
<tr>
<td>Less than 50%</td>
<td>45%</td>
</tr>
<tr>
<td>50% or more</td>
<td>50%</td>
</tr>
</tbody>
</table>

Approximately what proportion of your agency’s employees rely primarily on each of the following types of devices to do their work?
Few primarily use tablets currently

Only one-quarter report that 5% or more employees currently rely on tablets to do their work.

Approximately what proportion of your agency’s employees rely primarily on each of the following types of devices to do their work?
Greater reliance on tablets in the next year and a half

While tablet use is generally low, over half believe that at least 5% will primarily use tablets in the next 12-18 months.

Approximately what proportion of your agency’s employees rely **primarily** on each of the following types of devices to do their work?
Most say that at least one in five employees currently uses a smartphone

As expected, more progressive agencies report greater primary use of smartphones currently

Current Smartphone Usage

Approximately what proportion of your agency’s employees rely primarily on each of the following types of devices to do their work?
Use of smartphones for work expected to increase in the next 12-18 months

As expected, more progressive agencies report greater primary use of smartphones in the future.

Approximately what proportion of your agency’s employees rely primarily on each of the following types of devices to do their work?
Desksops to remain primary device

Desktop use overall expected to decline slightly, though majority report at least one-half of employees will still rely on them.

More progressive agencies are less likely to rely on desktops in the future.

Approximately what proportion of your agency’s employees rely primarily on each of the following types of devices to do their work?

- None: 4% Currently, 6% 12-18 months from now
- Less than 50%: 28% Currently, 32% 12-18 months from now
- 50% or more: 67% Currently, 62% 12-18 months from now
Use of two-way radios not expected to change

There is no indication that the use of two-way radios will change in the next 12-18 months

Approximately what proportion of your agency’s employees rely primarily on each of the following types of devices to do their work?
Study Conclusions

• Agencies are making progress enabling employees with mobile technologies
  o A third of respondents describe their agency’s mobile progress as ‘walking’ or ‘running.’

• Government managers believe that mobile technology can contribute significantly toward improved productivity and savings of taxpayer dollars.
  o About half of respondents say government employees like themselves could redeploy at least seven hours per week toward more productive work if fully enabled to work mobily.
  o More than three out of four think that productivity and cost savings will result from mobile technology making it easier to complete work from the field and by making telework easier.
  o A plurality expect a shift to mobile technologies could result in IT budget savings of 10%-29% over time, although that may be overoptimistic.

• But they struggle with how to pay for investments needed for mobility.
  o They anticipate additional costs and new processes will be needed to achieve broader savings.
  o Managers worry that IT departments will have to absorb new costs while transformative savings in business and work processes will occur outside of the IT department itself.

• Security -- in particular the possibility of data being compromised -- is the main barrier to supporting mobile technology.
Study Conclusions

• Government managers also need a clearer roadmap of how best to embrace mobility.
  o Better guidance on best practices, easier acquisition vehicles, and support tools are needed.

• Still, agencies are making headway deploying mobile friendly websites and mobile applications for citizens and employees.
  o Nearly two-thirds have either deployed an app or site or plan to in the next 12-18 months.
  o Only about one-third track the performance of mobile sites and apps.
  o About three-fourths are using government IT staffs to build government apps and sites.

• Tablets are expected to see the most growth in use over the next 12-18 months
  o The number of agencies using desktops, laptops, two-way radios and smartphones is expected to remain fairly stable; however, within agencies, the proportion of employees using smartphones is expected to increase.
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