Research Revisited

Survey Summary

2025 SURVEY RESULTS

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NASTD is a dynamic, member-driven association committed to advancing the effective use of information technology to achieve operational efficiency in state government.
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RESEARCH REVISITED SURVEY SUMMARY

Introduction

The National Association of State Technology Directors (NASTD) consists of information technology (IT) directors and professionals who implement the strategies and policy directives established by state chief information officers. The NASTD Executive Board charged its Research Committee to survey the states, revisiting strategic questions from previous association surveys. The committee reviewed past association surveys and selected eleven questions from five different surveys (mainframe, data center, IT modernization, identity access management and artificial intelligence) to revisit with the states to see where they stand today.

Methodology

NASTD distributed an internet survey to 50 state central IT authorities in October 2025. Thirty-six states and one United States territory responded to the survey: Alabama, Alaska, Arizona, Arkansas, Connecticut, Delaware, Illinois, Indiana, Iowa, Kentucky, Maine, Massachusetts, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Hampshire, North Carolina, North Dakota, Ohio, Oregon, Pennsylvania, Rhode Island, South Carolina, South Dakota, Tennessee, Texas, Utah, Vermont, Virgin Islands, Virginia, Washington, West Virginia, Wisconsin and Wyoming.

Survey Findings

State Mainframe Strategy Survey (2018)

The percentage of states managing mainframes in-house decreased from 53% to 21%, a drop of 32 percentage points. This shift corresponded with increases in alternative management approaches: managed services off-premise rose by 19%, fully outsourced solutions increased by 4% and hybrid management approaches grew by 17%.

Data Center Survey (2020)

States are shifting away from single-provider and on-premise solutions toward more diverse cloud strategies. They've decreased their use of single government cloud, single public cloud, and on-premise solutions, while increasing adoption of private cloud, multiple public cloud and multiple government cloud solutions.

In 2020, states anticipated investing primarily in government cloud, multiple public cloud, on-premise infrastructure and private cloud platforms. These predictions were accurate, though the private cloud investment was not quite as significant as expected.

IT Modernization Survey (2022)

State legislatures are increasingly focused on artificial intelligence, with the percentage of states pursuing AI-related statutes nearly doubling from 21% to 41%. Legislative interest in blockchain and cloud adoption has declined.

Funding and governance structures for IT modernization remain inconsistent. Only 40% of respondents report that their state has a dedicated budget mechanism for IT modernization. On the governance side, between 75-80% of states have established frameworks to guide their modernization efforts.

Identity and Access Management Survey (2023)

The largest increases in deployed identity access management capabilities were IT service management (ITSM) solutions (up 17%), system and application access monitoring (up 13%) and password self-service (up 5%).

For authentication methods, states increased their use of reCAPTCHA/CAPTCHA (up 40%), passkeys (up 23%), hardware tokens (up 15%) and out-of-band authentication (up 10%).

Artificial Intelligence (AI) Survey (2024)

In just over a year, the percentage of states with a clear AI definition for policy and governance increased from 74% to 87%. This includes states

that have both established and communicated such definitions. Additionally, 70% of states have now created an inventory of AI applications, up three percentage points from the previous year.

States are also focused on developing standardized contract language for AI procurements. Currently, 27% have established preferred AI contract language (an 18-percentage-point increase), while 62% are still considering it.

Summary

The survey findings reveal advancement in modernization, security practices and AI oversight. However, gaps in budget formalization and governance frameworks persist, signaling ongoing opportunities for enhanced collaboration and policy development.

State IT directors are responsible for implementing directives from their state's chief information officers (CIOs). The survey findings align with the top ten priorities for 2026 as identified by the members of the National Association of State Chief Information Officers[1]. Those key priorities include artificial intelligence, budget management, modernization, identity and access management, consolidation and optimization and cloud services.

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1. State CIO Top Ten Policy and Technology Priorities for 2026; NASCIO, https://www.nascio.org/resource-center/resources/state-cio-top-ten-policy-and-technology-priorities-for-2026/

What is your state's current mainframe strategy?

■ **Previous Responses**   ■ **2025 Responses**

Managing in-house
- 53%
- 21% *-32%* ↓

Managed service on-prem
- 16%
- 8% *-8%* ↓

Managed service off-prem
- 3%
- 22% *19%* ↑

Fully outsourced service
- 18%
- 22% *4%* ↑

Hybrid approach
- 10%
- 27% *17%* ↑

0   10   20   30   40   50   60   70   80   90   100

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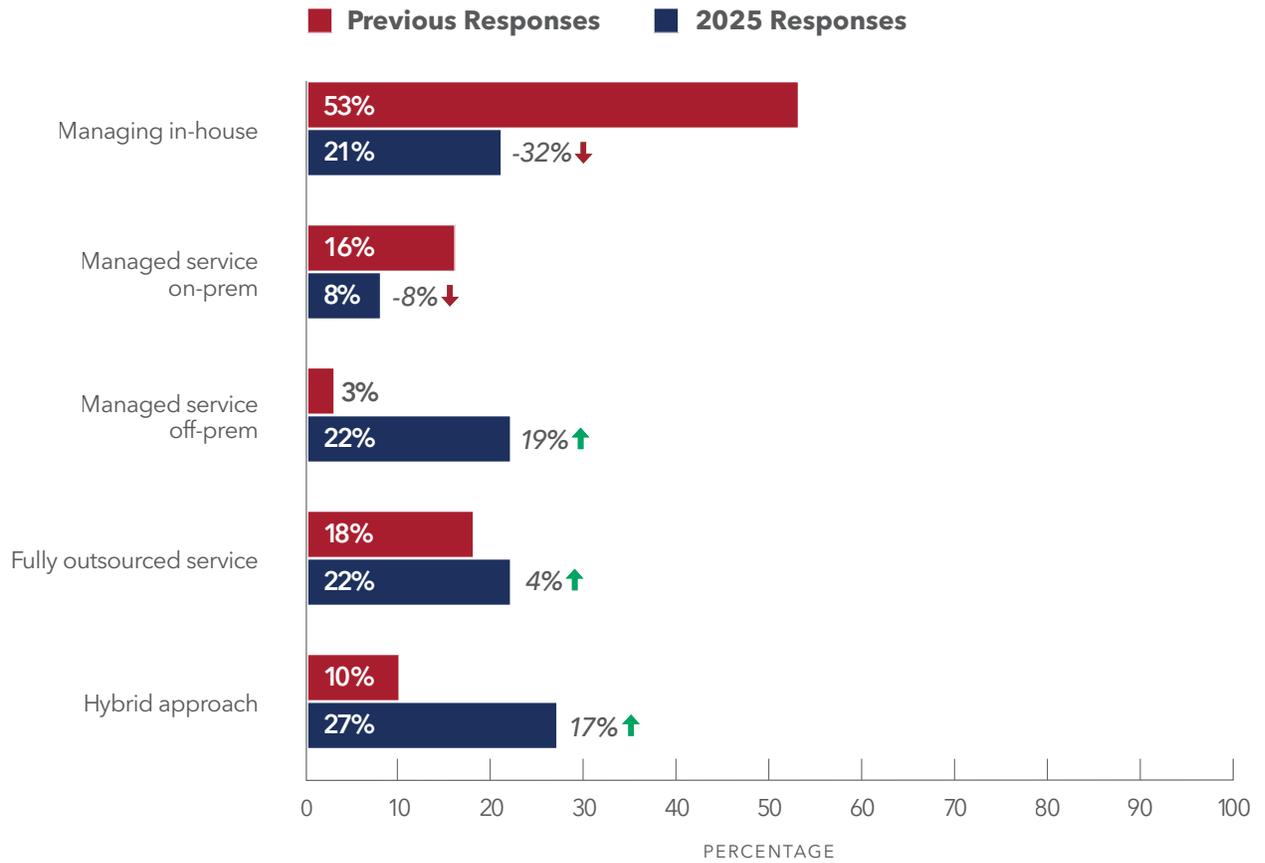
Which compute platforms does your data center provide?
(select all that apply)

Legend: ■ Previous Responses ■ 2025 Responses

Platform	Previous	2025	Change
On-premise infrastructure	98%	92%	-6% ↓
Private cloud	76%	81%	5% ↑
Multiple public clouds	54%	68%	14% ↑
Multiple government clouds	41%	57%	16% ↑
Single government clouds	32%	24%	-8% ↓
Single public cloud	15%	3%	-12% ↓

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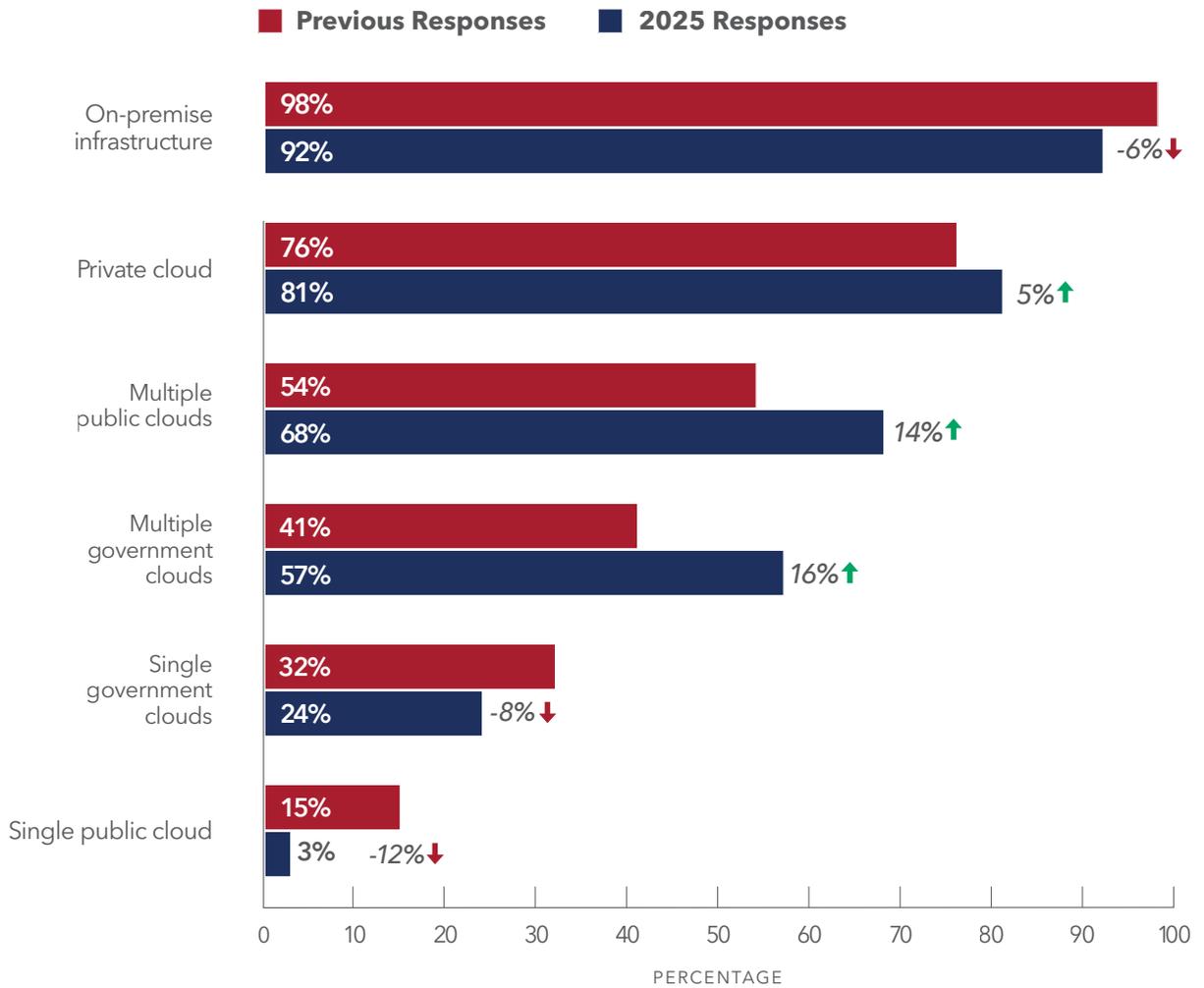
In which compute platforms did your state invest over the past 3-5 years? *(select all that apply)*

■ Previous Responses　　**■ 2025 Responses**

Government cloud
- 80%
- 84% *4%* ↑

Multiple public cloud
- 73%
- 81% *8%* ↑

On-premise infrastructure
- 71%
- 86% *15%* ↑

Private cloud
- 71%
- 59% *-12%* ↓

Single public cloud
- 12%
- 5% *-7%* ↓

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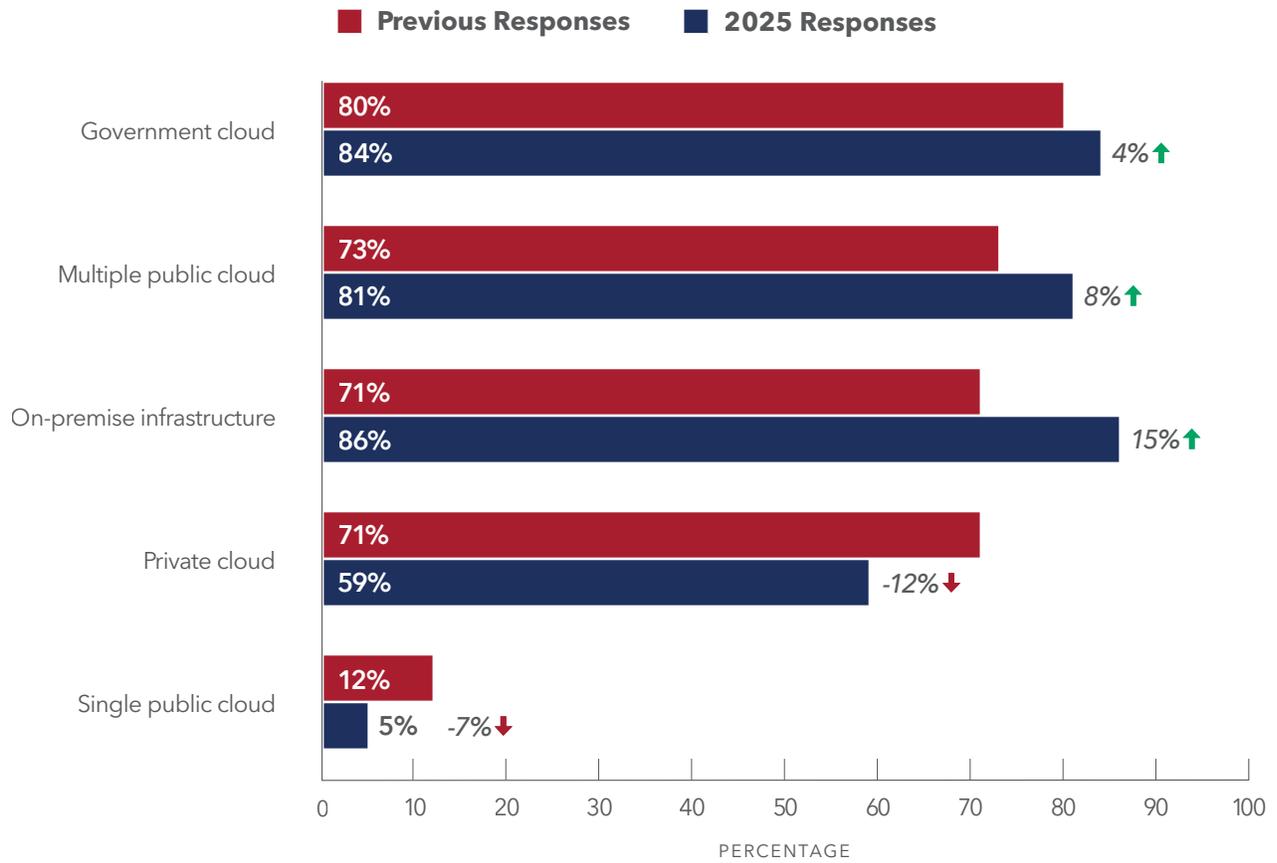
Has your state legislature included statutes which drive cloud adoption or other innovations such as blockchain or AI?

■ Previous Responses　**■ 2025 Responses**

Artificial intelligence
- 21%
- 41%　*20%* ▲

Blockchain
- 33%
- 11　*-22%* ▼

Cloud
- 42%
- 24%　*-18%* ▼

None
- 21%
- 46%　*25%* ▲

Other
- 8%
- 11%　*3%* ▲

0　10　20　30　40　50　60　70　80　90　100

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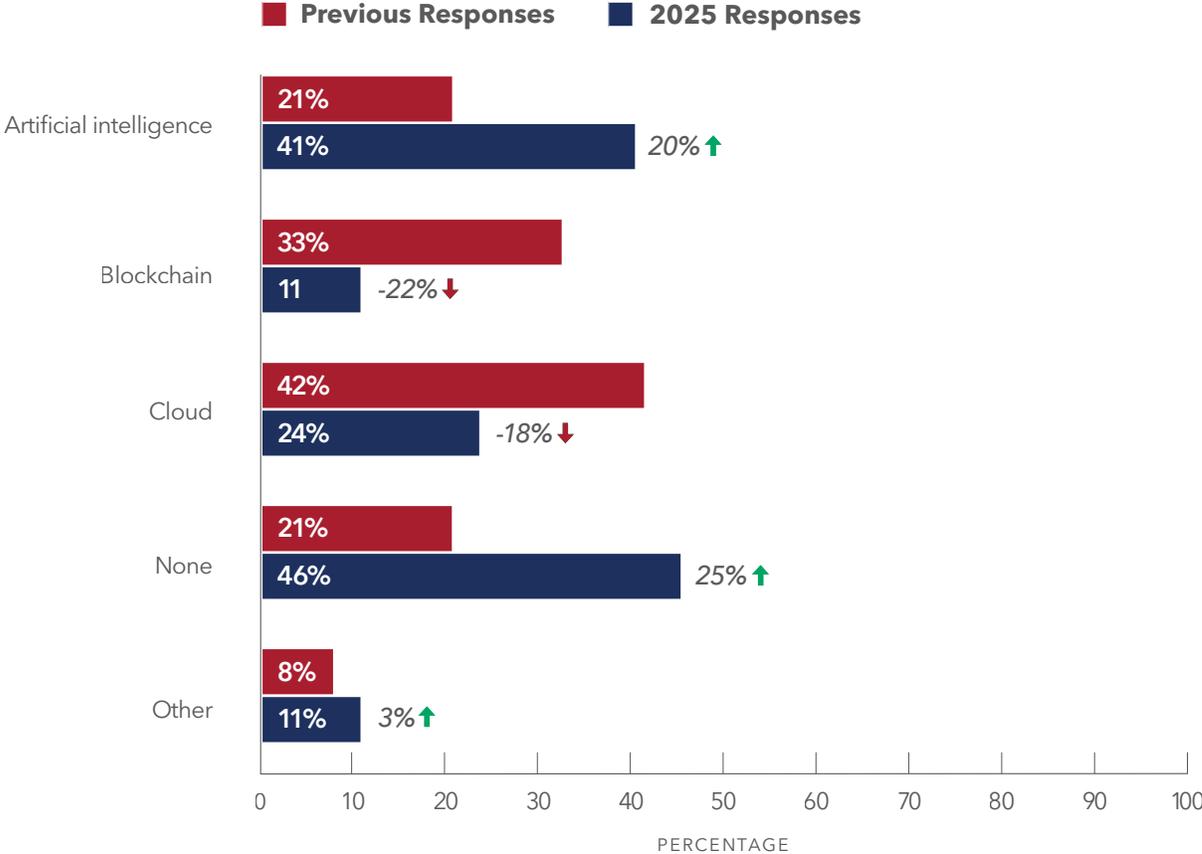
Does your state have a budget mechanism established specifically for IT modernization?

Legend: ■ Previous Responses ■ 2025 Responses

Category	Previous	2025	Change
Yes	50%	40%	-10% ↓
No	47%	49%	2% ↑
Uncertain	3%	11%	8% ↑

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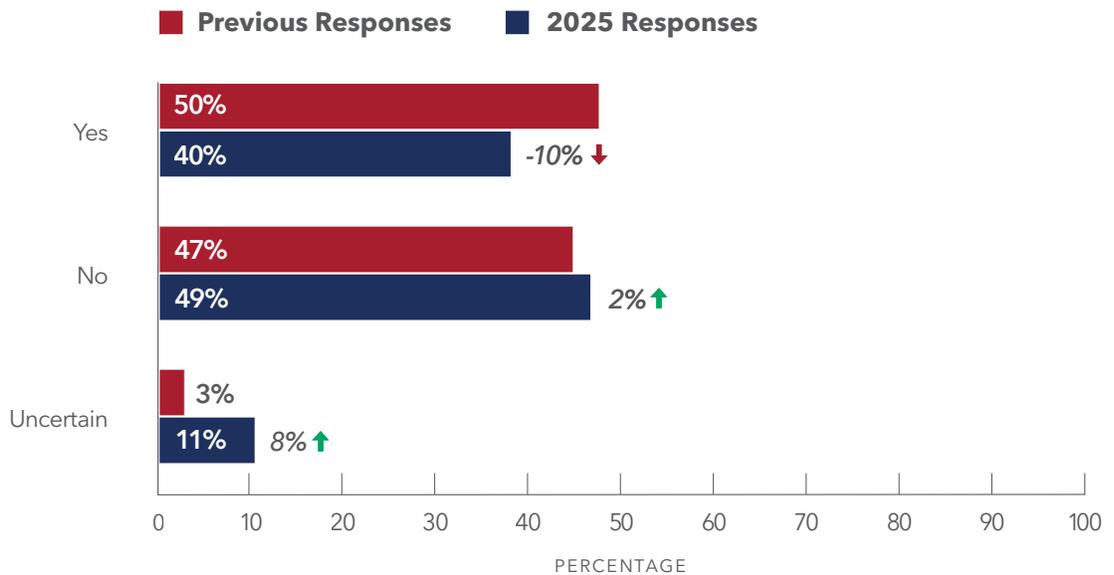
Has your state established a governance framework around its modernization efforts?

Legend: ■ Previous Responses ■ 2025 Responses

Category	Previous	2025	Change
Yes	50%	38%	-12% ↓
No, but currently working on one	31%	35%	4% ↑
No	16%	16%	0%
Uncertain	3%	11%	8% ↑

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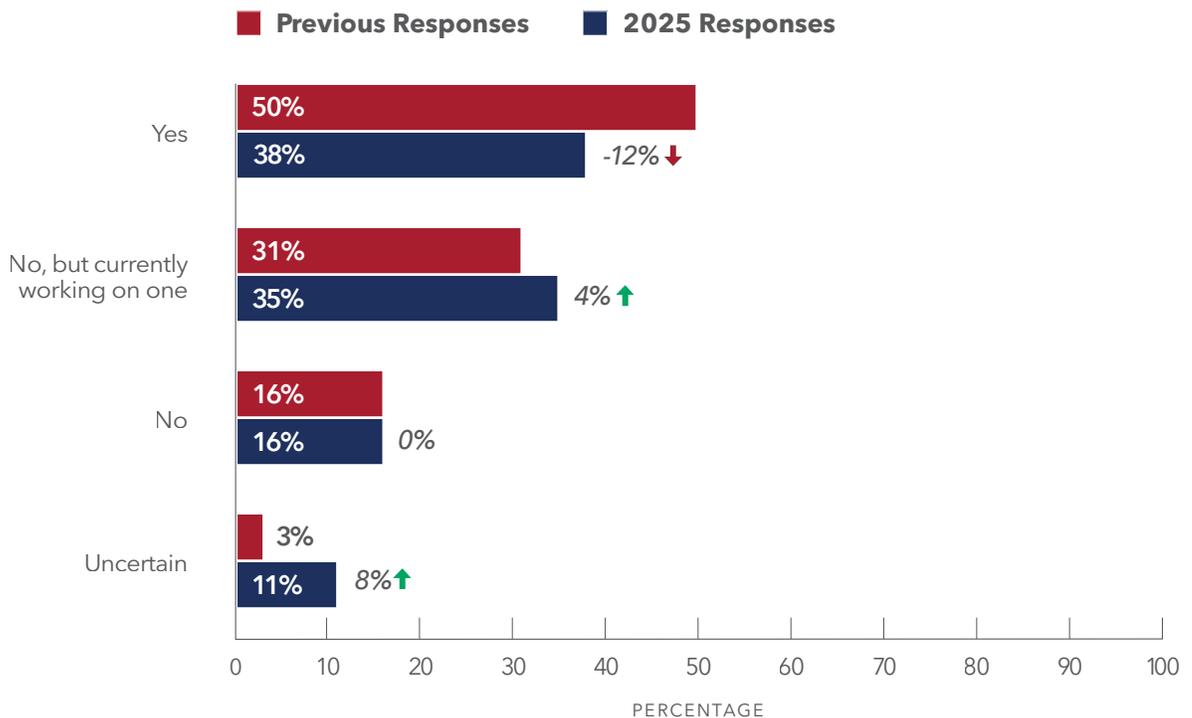
What IAM capabilities are deployed in your state? *(select all that apply)*

■ **Previous Responses**   ■ **2025 Responses**

Single sign-on
- 100%
- 97% — *-3%* ↓

Role-based access control
- 88%
- 84% — *-4%* ↓

Password self-service
- 84%
- 89% — *5%* ↑

Considerations for contract or temporary staff
- 75%
- 59% — *-16%* ↓

Administrative reporting
- 69%
- 54% — *-15%* ↓

Compliance or auditor reporting
- 66%
- 57% — *-9%* ↓

System and application access monitoring
- 63%
- 76% — *13%* ↑

User monitoring
- 56%
- 54% — *-2%* ↓

Integration with service desk / ITSM solutions
- 53%
- 70% — *17%* ↑

Automated user provisioning / de-provisioning
- 50%
- 38% — *-12%* ↓

Advanced analytics such as AI or machine learning
- 22%
- 24% — *2%* ↑

Streamlined user certification / auditing
- 19%
- 3% — *-16%* ↓

None of the above
- 0%
- 0%

PERCENTAGE (0 10 20 30 40 50 60 70 80 90 100)

What authentication methods are used in your state?
(select all that apply)

■ **Previous Responses** ■ **2025 Responses**

Authentication Method	Previous	2025	Change
Username and password	100%	100%	
Software tokens *(one-time password)*	66%	68%	2% ↑
Out-of-band authentication *(push, SMS, voice, etc.)*	63%	73%	10% ↑
Hardware tokens *(key fobs, USB tokens, smart cards)*	63%	78%	15% ↑
Biometric authentication	34%	41%	7% ↑
Tokenless authentication *(context- and pattern-based authentication)*	16%	11%	-5% ↓
Passkeys	9%	32%	23% ↑
Social identity credentials *(LinkedIn, Facebook, etc.)*	6%	3%	-3% ↓
Re-captcha/captcha	3%	43%	40% ↑
None of the above	0%	0%	

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Has your state established and communicated a clear definition of AI for the purpose of policy and governance?

Previous Responses   **2025 Responses**

Established
- 22% (Previous)
- 38% (2025) *16% ↑*

Established and communicated
- 52% (Previous)
- 49% (2025) *-3% ↓*

Neither
- 26% (Previous)
- 13% (2025) *-13% ↓*

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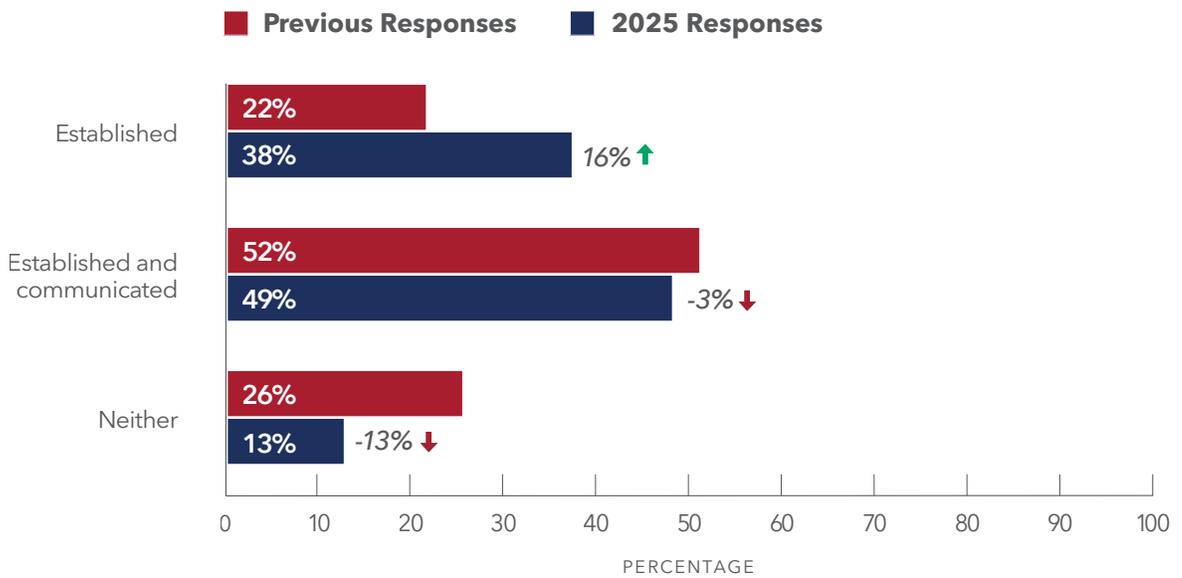
Is your state capturing an inventory of AI applications?

Previous Responses   **2025 Responses**

Yes
- 67% (Previous)
- 70% (2025) *3% ↑*

No
- 33% (Previous)
- 30% (2025) *-3% ↓*

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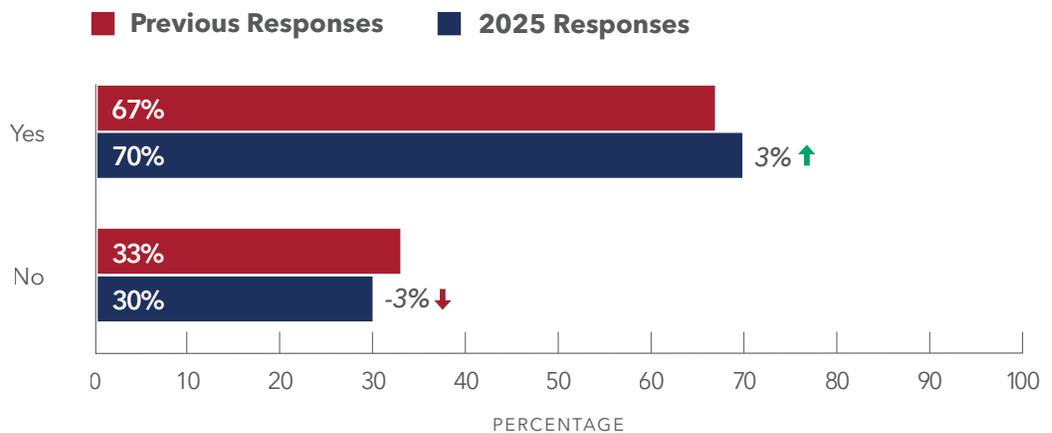
Has your state developed preferred contract language (business associate agreements, use of data, cybersecurity, etc.) around the case of AI technology for AI procurements?

■ **Previous Responses**   ■ **2025 Responses**

Yes
9%
27% *18%* ↑

No
29%
11% *-18%* ↓

Under consideration
62%
62%

PERCENTAGE