

White Paper on Understanding Generation Y and their Perception of e-Government



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1 Executive Summary

eGL offers this white paper report on “Understanding Net Generation and their perception of e-Government” for the iGOV global Exchange Forum on June 15, 2009.

Key Questions addressed by this paper include:

- What are the Y-Generation’s views on e-Government services?
- How has technology influenced them?
- What are their new expectations as employees and as citizens?

Analysis of data from the 2008 *Singapore Quantitative Study: The Net Generation and Government*¹ and from multiple NGenera’s *Net Generation Studies*² demonstrates a few important findings, namely that:

- e-Government is currently implemented as a mechanism for better, faster and cheaper service delivery in a “utilitarian” sense;
- On-line citizens generally find e-Government services satisfactory along the usage dimension;
- Opportunity to capitalize on e-Government as a method for interaction and relationship building with the Y-Generation is unexplored and under-exploited.

¹ On-line survey of Singapore citizens conducted in July 2008. Report is available from eGL.

² NGenera Corporation (www.NGenera.com) is a research partner to eGL, and is the leader in the syndicated research program “Government 2.0”.



2 Introduction: Generation Y as a Consumer, Employee and Citizen

Generation Y, or the Net Generation, is a group of individuals born between 1977-1997. A generation exhibits a common mind-set based on a shared set of experiences from a location in history. Generation Y is the first generation to have grown up with ubiquitous exposure to digital technologies adopted these tools as their primary mechanism for communication, education, information gathering and sharing [2].

Traditionally, e-Government services have been developed to improve the quality, cost and timely delivery of government services. We expect this generation to have a different expectation for e-services than the older X-Generation and Baby-Boomers. How has the continuous use of technologies influenced the Y-Generation in their expectations as a consumer, employee, and most importantly, as a citizen?

3 Data Sources

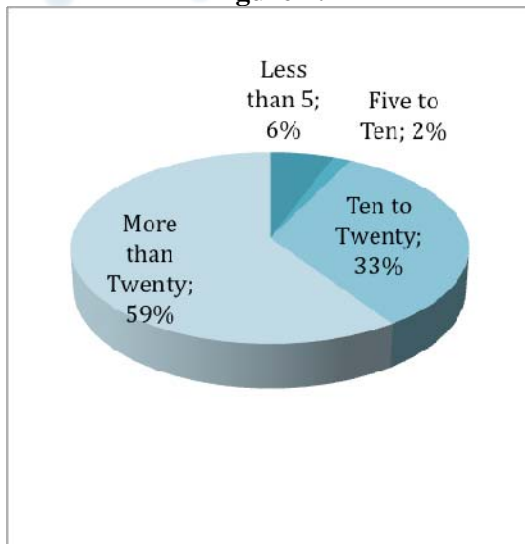
The following key sources were used as data resources:

1. *Singapore Quantitative Study: The Net Generation and Government:*
This study surveyed 2202 Singapore citizens, inclusive of 1393 Y-Generation respondents in order to determine generational profiles based on five main criteria: General survey respondent information, Web 2.0 awareness and usage, government service delivery, public sector employment and lastly, government policy and governance. This paper shall refer to this study as the survey.
2. *NGenera research reports:* NGenera has conducted a number of surveys and literature reviews that provide insightful information and statistics on the Net Generation, a multitude of which are referenced in this report.
3. Other research reports:
 - a. World Value's Survey 2008
 - b. Youth Pulse 2007
 - c. Australian Democrats Youth Poll 2007

4 Generation Y: Consumers

4.1 Technology Adoption

Figure 1:



Source: eGL. Singapore Quantitative Study, 2008

Singapore is a highly connected nation where the majority of individuals spends at least 20 hours a week surfing the internet [1]. This finding is supported in a comparable study by NGenera that also revealed the Y-Generation would rather live without a TV than the internet which demonstrates the importance of the internet in their lives [2]. A NGenera study on technology adoption reveals that over 80% of the global Y-Generation owns a mobile phone and are more likely to have a mobile phone than landline [2].

The same study showed that well over 60% of individuals who own a phone are text messaging and increasingly use mobile browsing [2].

In Singapore, the Y-Generation is using the web for a myriad of uses – blog, wiki, photo-

sharing, e-commerce, banking, gaming, pod-cast beyond the usual information searching and communication [1].

4.2 Products and Services

In terms of purchasing products, the survey also shows that Generation Y spends time researching products, visiting merchant websites and banking online [1]. When Generation Y sees an ad for a product of interest, all will try to gather more information by going directly to a product website or by doing a web search [2]. Research shows that almost all Y-Generation respondents have made purchases online and see themselves buying online in the future as well [3].

Additional studies reveal that customization and personalization of products and services is important to the Y Generation [4] and surprisingly, 60% say that they take advantage of opportunities to help companies develop their products and services [5].

4.3 Information Consumption

Survey respondents note that their primary activities online are to look for information, read news / other media and communicate with friends, facilitated by social networking tools, video/photo-sharing sites, blogs, RSS feeds and Wikis [1]. NGenera data shows that the Y-Generation users are content creators who add or change things online as seen in Figure 3.

Amongst the different surveys, there is lack of attention being paid to instant messaging applications with only one survey (Youth Pulse) asking individuals about their usage of these tools [6]. Likewise, few surveys explicitly ask survey participants about e-mail usage. In particular, it would be useful to know how they use e-mail for work compared to their personal life and in terms of effectiveness relative to other communication tools.

Figure 2

Source: NGenera. Meet the Global Net Generation, July 2007

Country	% of N-Gen Who Have Bought Online
Germany	99%
France	97%
UK	96%
China	95%
Japan	95%
USA	94%
India	92%
Spain	89%
Canada	88%
Mexico	85%
Brazil	84%
Russia	75%

Figure 3

Source: NGenera. Meet the Global Net Generation, July 2007

Country	% Who regularly change or add things online
Germany	95%
France	94%
UK	81%
China	78%
Japan	75%
USA	71%
India	69%
Spain	68%
Canada	67%
Mexico	64%
Brazil	64%
Russia	41%

4.4 Advertisement and Marketing

Word of mouth is still a strong marketing tool among the Y-Generation with 60% of respondents claiming they have positively reinforced a product [5] and 51% foretelling they would speak negatively of a product should it not meet the promises made through its advertisements [4]. However, T.V ads remain the most influential tool in influencing the Y-Gen to buy a product [5] and 50% of the generation cited internet ads as the most often avoided [4].

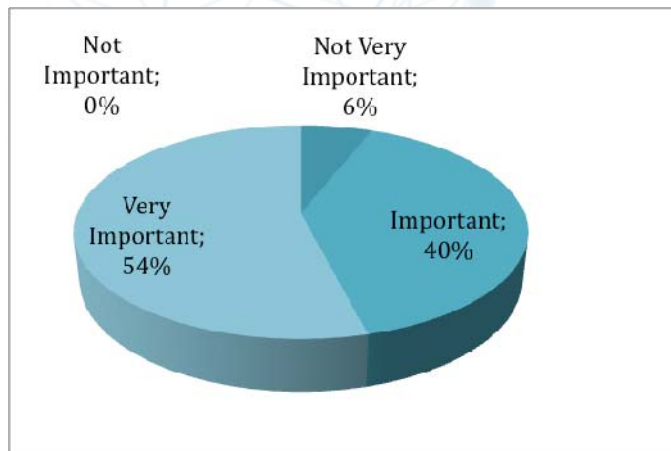
There is a significant research gap on how the Y Generation has come to know of government services or engagement initiatives and is worthy of further exploration. Were they told about them? Do they see e-citizen posters? Did they come across the government websites and links on their own by browsing? Similar questions should be asked concerning what tools, in their opinion, are the best marketing and advertising tools for government, especially since they avoid internet ads.

5 Generation Y: Employees

5.1 At Work

Figure 4

How Important is it for you to be able to use online applications at work?



Source: eGL. Singapore Quantitative Study, 2008

An NGenera survey shows that Generation Y has a strong sense of employee empowerment with over 60% of individuals claiming that they would like to have a say in job responsibilities, when/where they work and their job descriptions, as opposed to being delegated to. In particular, the majority of Y-Generation (70%) claim that work and fun can and should be the same thing [5], that tools which offers assistance with collaboration/communication are vital [1] and the flexibility to work from home/elsewhere is important [3].

Similarly, respondents to the NGenera survey say they are always looking for new ways to do their job better [3].

The Y-Generation sees Web 2.0 tools as a way of making faster and more informed decisions as well as increasing collaboration and teamwork [1]. In fact, all but 6% of those surveyed see web applications as an important part of their work figure 6 [1][8].



5.2 *Looking For Work*

Many individuals visit employment related sites to research employers or go to professional networking sites. Although they did not specify whether it was online or not, 60% of participants in an NGenera survey say they thoroughly research an employer before ever accepting a job offer [3].

I will thoroughly research an employer before every accepting a job offer – 60% strongly agree

Source: July 2007 NGenera Report “Meet the Global Net Generation”

Consistent in all surveys of the Y-Gen, for-profit organizations are the top choice of employer and government/civil services jobs are second [1] [2]. The main reasons why individuals would want to work for the government are because it aligns with their values/ideals, it has a competitive salary, and a desire to make a difference in their community [1]. Government jobs are also seen to offer better security and benefits than the private sector [7].

Alternatively, workplace technology and culture, pace of decision making and the ability to make decisions or implement changes are the main reasons cited as to why individuals would **not** like to work

for the government. Research also shows that the government falls behind the private sector in innovation/creativity [7].

6 *The Y Generation as Citizens*

6.1 *Importance of Politics*

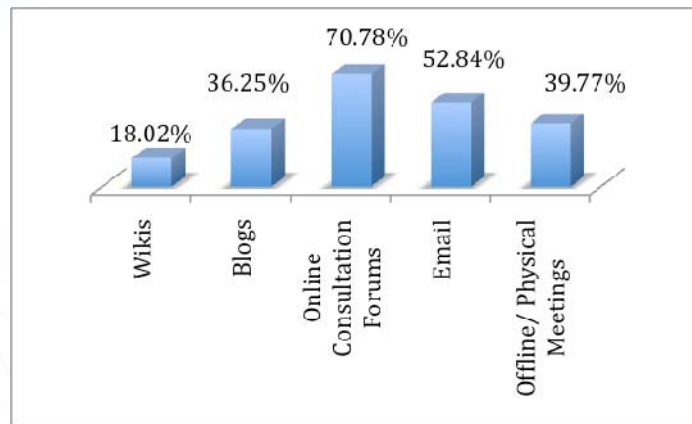
A World Value’s survey shows that 43.9% of youth find politics important in life; only 1% less than in older age groups. This clearly demonstrates that youth are interested in politics yet; youth voting is substantially less among younger generations [9]. The incongruity means a few things: either the Y-Generation has political opinions which they keep to themselves or they choose other means of political involvement instead of voting. An NGenera study shows that this generation has a higher volunteering rate than any other age group [5] but further investigation would expose the real reason why they choose not to vote..

6.2 *The Government-Citizen Relationship*

A survey of Canadian citizens conducted by NGenera reveals that they believe Federal Government consultations are poor but their opinion of them could improved if it was clear that the government had sought citizen input [10]. This is consistent with the Singapore Y-Generation study which also reveals that online consultation forums, e-mails and blogs are all methods the government could use to better facilitate citizen input [1].

Figure 5

What Web 2.0 tools can best facilitate citizen input into government decisions?



Source: eGL. Singapore Quantitative Study, 2008

However, one person noted that the e-Government tools “might ease the implementation to connect with the younger generation; however, it does not really tackle the issue that the younger generation have a perception that they are distant from policy making decisions.” [1] This implies that there are broader citizen engagement issues that need to be tackled in addition to e-Government initiatives that aim to involve the younger generations in politics.

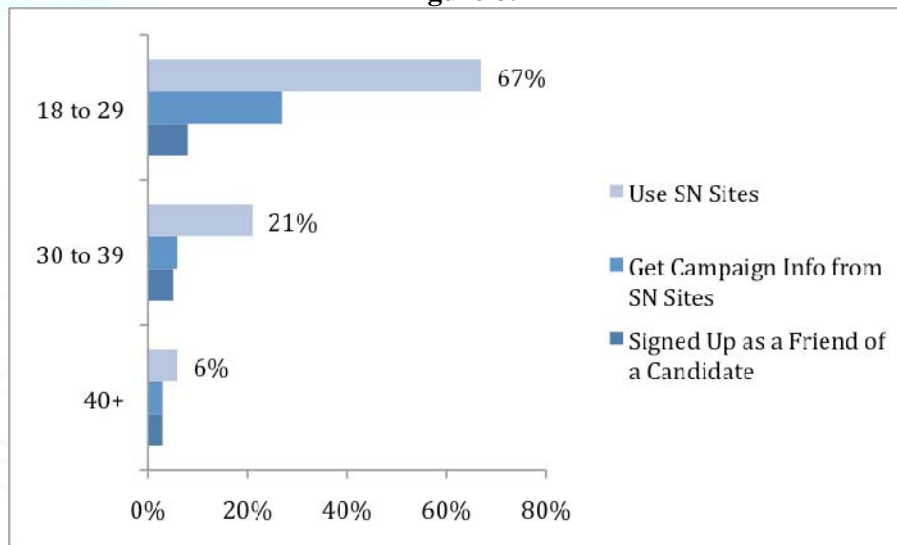
Further consideration should be placed on whether or not these tools are particularly interactive as this may be more appealing to younger individuals and better engage them in political conversation.

The world values survey also indicates that the Y-Generation has a lower-level of confidence in information released by official sources, such as the press/news, parliaments, civil service, the government (local, regional and federal), and political parties [9]. Comparable results were found in an Australian Democrats survey on teens between the ages of 15-20. In this survey, 46% of respondents said they trust family for political information. Media and politicians came in last with 3% and 4% respectively and a great 26% of teens selected ‘none of the above’ [11]. This data points to an interesting anomaly. So, where do the Y-Generation online users visit to gain different perspectives? Interestingly, an NGenera study shows that more individuals are using Blogger as opposed to CNN as an outlet for their political views. Likewise, a greater number of individuals are using social networking sites for political communication, to gather campaign info or to sign up as ‘friend’ of candidates (see figure 8). This is shown to be more popular among the Y-Generation than the X Generation or Baby Boomers [12]. This provides strong evidence for the claim that governments should use online tools to interact with Generation Y for citizen involvement in policy decision-making.

On a side note, an interesting comparative study would be to examine the varying levels of awareness between different countries on the services that their government provides and the level of satisfaction. Singapore has many e-citizen

outreach advertisements, including messages on public buses and stations; thus would most likely have a higher percentage of individuals who know what the government does for them versus other parts of the world.

Figure 6:



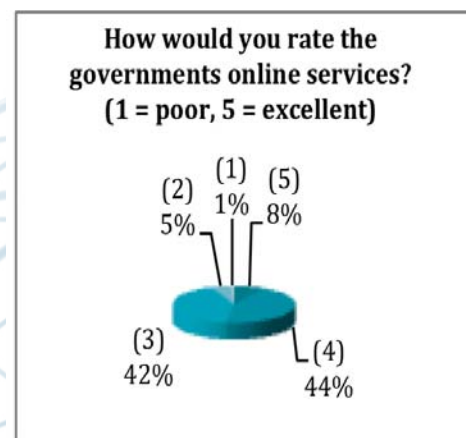
Source: NGenera. Political Communication in a World of Social Media, 2008

6.3 Government Services

The majority of respondents find that government services satisfy or meet their expectations [1]. However, 88% of respondents pointed out governments can improve service delivery by utilizing Web 2.0 applications. Overall, they perceive the main benefit of online service delivery is faster service [1]. The survey gave participants the opportunity to air their views on e-Government [1]:

- “Its best if all services are linked to one domain”
- “I think e-services is the way to go, as it is fast, easy and convenient, can be accessed anywhere, anytime”
- “e-Services should be made available 24 hours a day”
- “Badly designed, no consideration for usability, chunky, heavy and old technologies...slow response should error occur with e-services”
- “Ease of submitting feedback is the first step; the next is to ensure prompt responses. There is also no point to giving stock/routine answers”

Figure 7



Source: eGL. Singapore Quantitative Study, 2008

7 Interpretations

Generation Y has been immersed in computers, the Internet and digital media throughout their lives. The high exposure to electronics has fostered reliance on the Internet for communication, information gathering and decision-making thereby creating new demands for government and their employer.

When using online applications, the Y-Generation expects speed, convenience and few barriers to information; the Government of Singapore's online services are presently meeting these needs. However, the Y-Generation sees that better service delivery and providing more personalized customer service can be achieved by using web 2.0 tools.

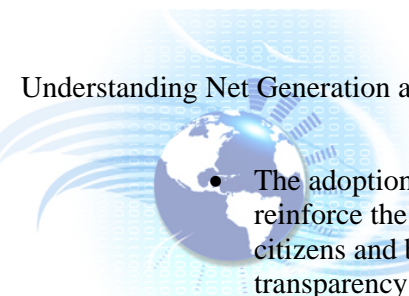
At work, web 2.0 applications help the Y-Generation make faster and more informed decisions due to better flow of information. Furthermore, technology that aids collaboration and information sharing is a key criterion in the evaluation of an employer and is one area where the private sector is exceeding the government as a top employer.

Lastly, the Y-Generation is pushing political discussions onto the Internet. Online applications encourage new kinds of civic duty by using new mediums of interaction. For example, in the United States during the 19th and early 20th century, posters of Uncle Sam personified the American public administration. They were meant to persuade individuals into the army, to vote and to remind citizens of the authority of government. Furthermore, presidential debates became televised in 1960 but they had limited interaction with the public so, politics remained an "old boys club". Today, Barack Obama gives his presidential addresses to citizens on YouTube allowing individuals to comment, share and rate the content of his video based on their personal opinions. To Generation Y, web 2.0 applications increase transparency, accessibility and citizen engagement in government policy decisions. The need to be included in the policy decision-making process and express their viewpoints is a universal commonality among the Y Generation.

8 Implications for e-Government

The research interpretations provide interesting direction for the future of e-Government services:

- The current ideology for e-Government services is utilitarian; that is, provision of faster and cheaper services. Generally speaking, the Y-Generation is satisfied with e-Government services. However, they see e-Government with broader application than simply utilitarian service delivery.
- The Y-Generation sees e-Government as useful for increasing the awareness of government service offerings and as a tool for reaching out to citizens during the policy development process.

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- The adoption of web 2.0 tools into the e-Government framework will reinforce the relevance and authority of government by opening dialogue to citizens and building stronger relationships through collaboration, transparency and mutual trust.
 - The opportunity to use e-Government as the mechanism to build relationships has been relatively overlooked despite the potential it holds for the government-citizen connection and its high relevance to the Y-Generation.

9 End Notes

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