



Consumer Crossover: *Me, Myself, and IT*

June 12, 2012

Underwritten by:



Every IT user has two profiles: the work user and the personal user – and never the twain shall meet. Until, of course, now.

Tablets. Cloud storage. Smartphones. Social media. Where the work user ends and the personal user begins is an increasingly fuzzy line.

As Federal agencies seek to apply the principles of the new [Digital Government Strategy](#), how does personal use drive innovation in the application of technology to the business of government?

To better understand how consistent changes in consumer IT have changed technology adoption in Federal agencies, MeriTalk surveyed 220 Federal employees to understand how they currently adopt and use new technology, both at work and in their personal lives.

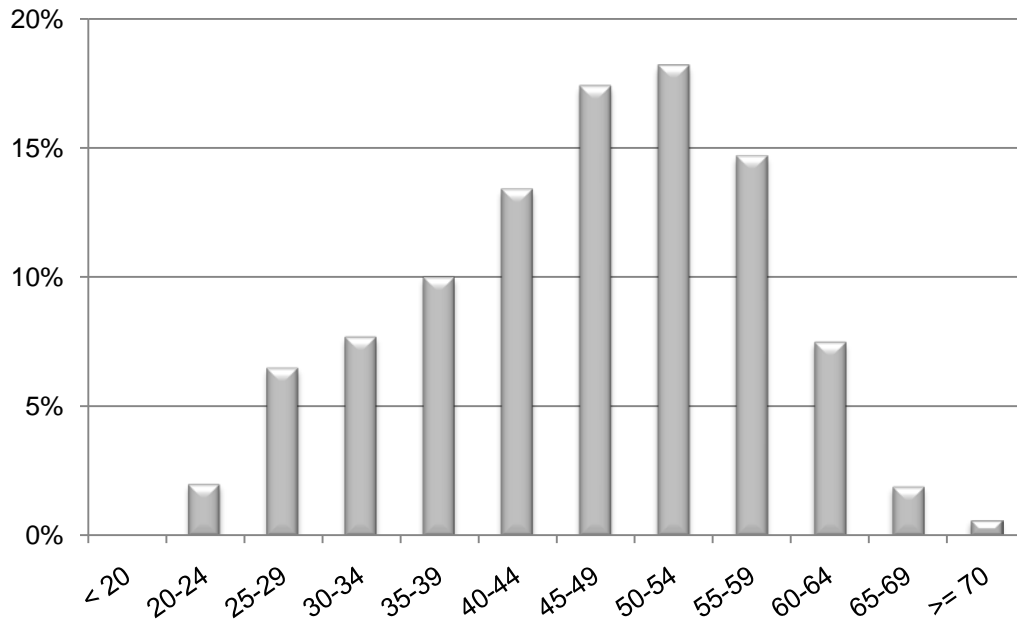
“The mantra of ‘anytime, anywhere, any device’ is increasingly setting that standard for how information and services are both delivered and received in a two-way exchange of information and ideas. *We must embrace the ability of new technologies to drive participation in the public square.*”

- *Digital Government Strategy*,
May 2012

- Consumer technology is increasingly crossing over to the work place. As a result, how Federal employees adopt personal technology increasingly defines how they adopt technology at work
 - **67 percent** of Federal employees wish that the technology at work would keep up with the technology that they use in their personal lives
- In fact, many Federal employees have already adopted a wide array of technology tools for use in their personal lives
 - **99 percent** of Federal employees use email and **81 percent** use Web mail
 - At least **93 percent** of Federal employees bank or buy items online
- Age is not the primary variable for technology adoption; the technology itself is
 - More Feds age **56 to 66** use video conferencing/chat than peers **35 to 55**
 - **76 percent** have been going online for news for more than three years and **63 percent** have been involved in social media for 3+ years
- Of the top four barriers to adoption, three cross over between work and personal lives
 - The top barrier to adoption of new technology at work is **training**
 - Cost of purchase, new features and functions, and information security affect work decisions as well as personal technology investment

- Age impacts adoption – though not to the extent one might think. As a result of massive efforts to avoid the “silver tsunami,” Federal employees are older than the U.S. population at large.

Federal Employees by Age



Source: U.S. Office of Personnel Management

33

Source: U.S. Census

Average age (in years) of workers in the U.S.

46

Source: Federal Times

Average age (in years) of U.S. Federal employees

- With rapid advances in personal technology in recent years, Feds are left wanting to apply the technology innovations at home to the agency setting.

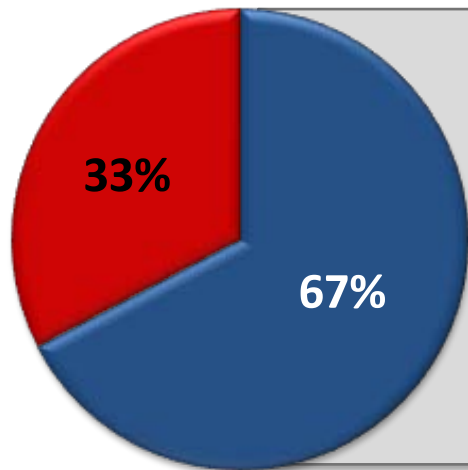
I wish that the technology at work could keep up with the changes in technology in my personal life.



Agree



Disagree



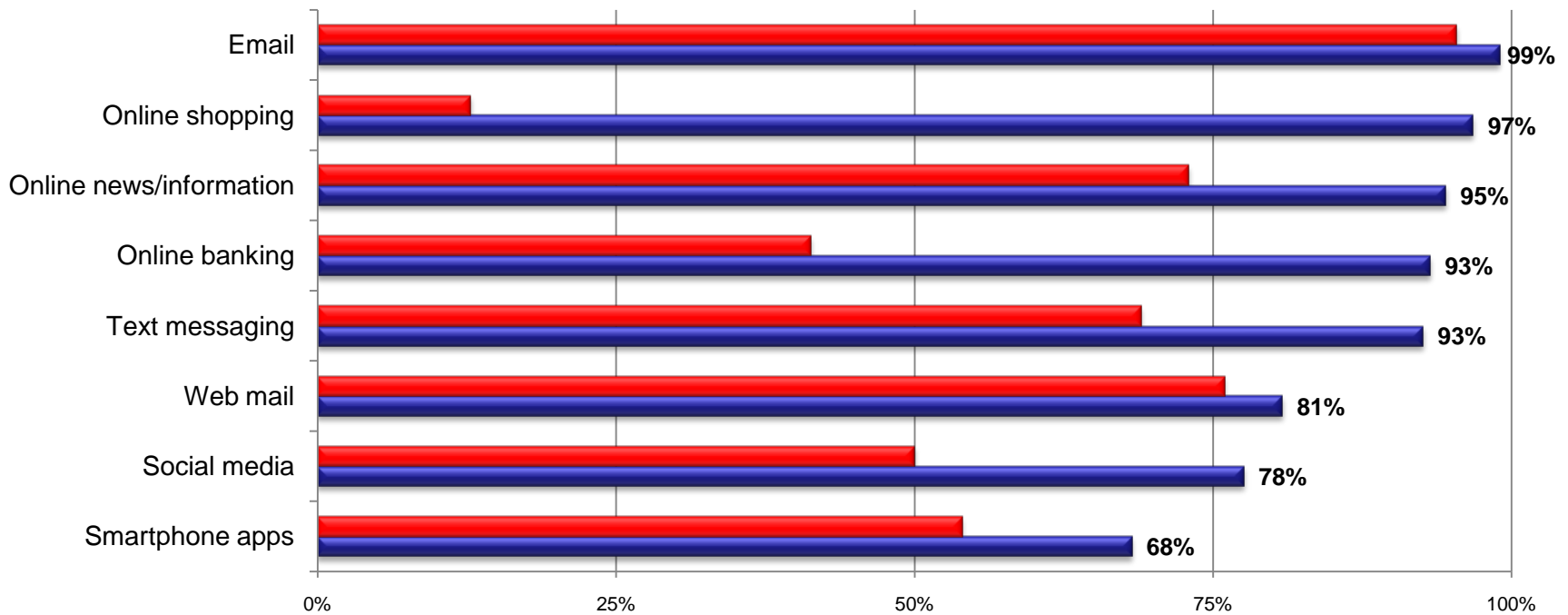
For Feds 35 and younger, **80%** wish that work tech could keep up with personal tech.

Take Away: Personal Technology Advances Setting the Pace

- The new Digital Government Strategy isn't a "leap ahead," it is a "leap from home" – most Feds already use web-based and mobile applications.

Do you use the following?

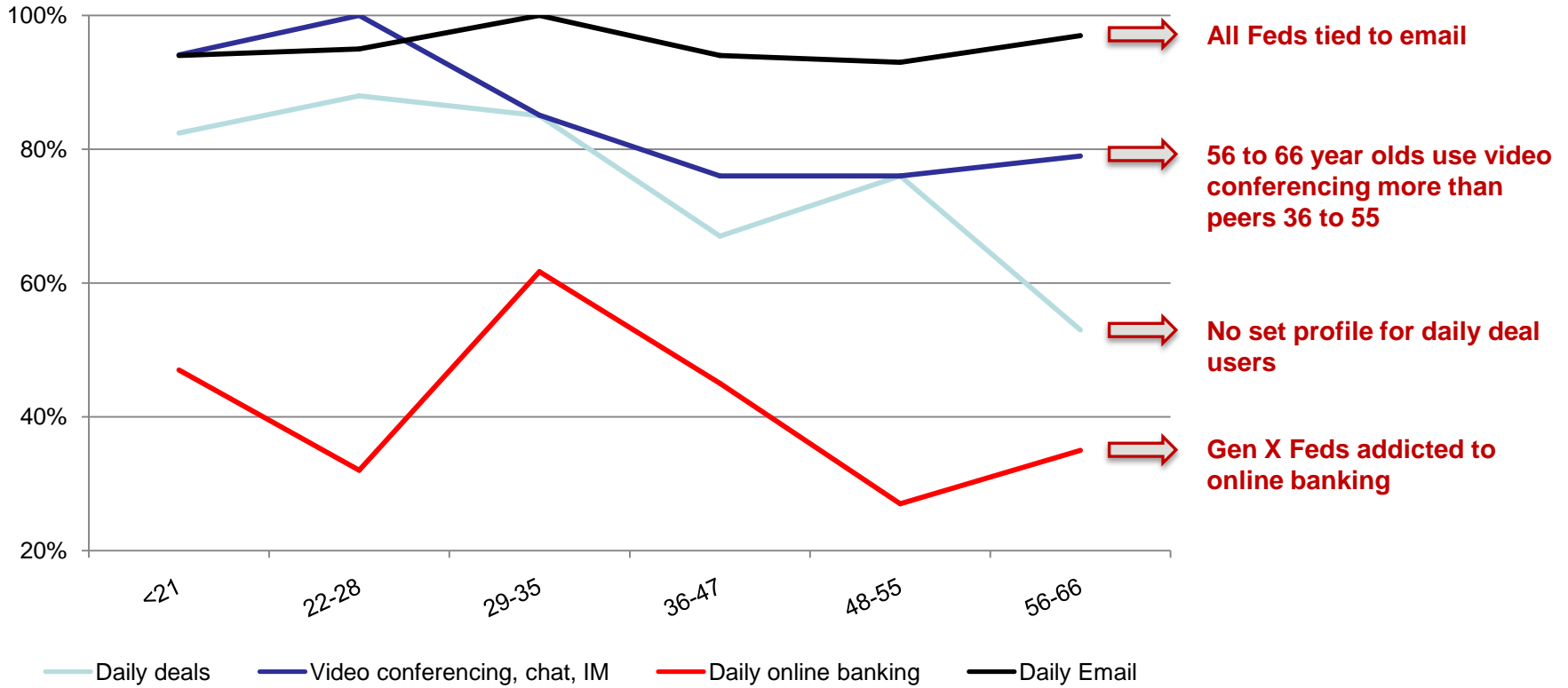
■ Use ■ Use Daily



Take Away: Feds Already Use A Lot of Technology Tools

- Age still relevant to IT usage, but now there is a lot more texture.

Do you use the following?



Take Away: Rule Rewrite In Progress

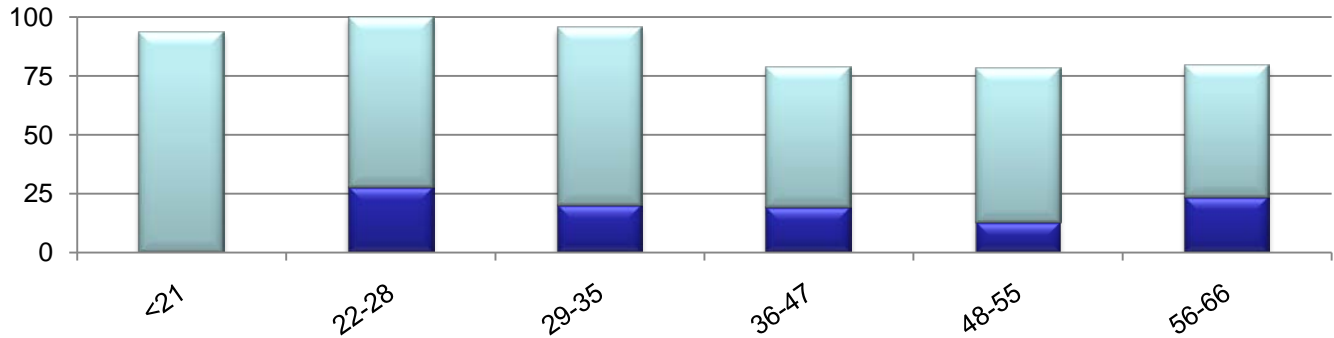
All Dogs Learning New Tricks

- Younger Federal workers tend to get there faster. Surprisingly, older Federal staff still get there all the same.

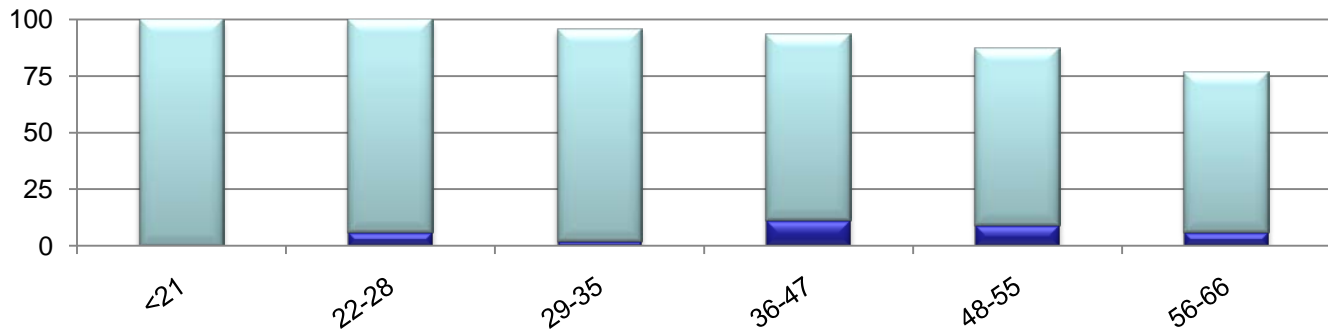
How long have you been using the following?

■ 3 years or more
 ■ 1 year or less

Video conferencing, chat, IM



Web mail



Take Away: Digital Migration Acceleration

Many Feds Are Already There

- Technology that seems new in the enterprise has already been in personal use – in some cases for years.

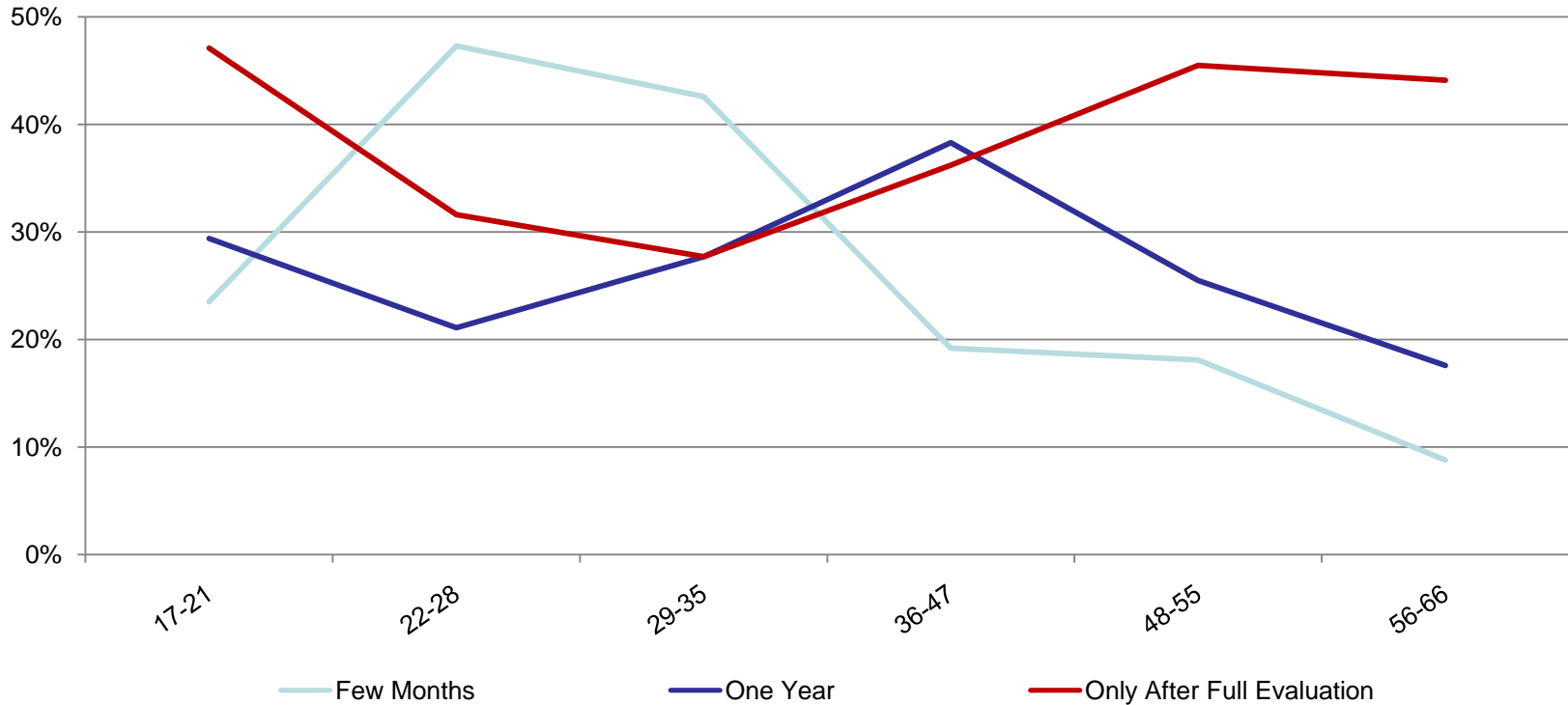
	<u>3+ Years</u>	<u>5+ Years</u>
Video conferencing/chat, IM	68%	47%
Social media	63%	36%
Web mail	84%	74%
Online shopping	87%	72%
Text messaging	73%	49%
Online news/information	76%	60%
Smartphone apps	32%	14%



Take Away: A New Definition for “New”

- Think that the relationship between age and adoption is linear? Think again. Waiting for full evaluation means more to younger users.

Once available, how soon do you test out new technology?

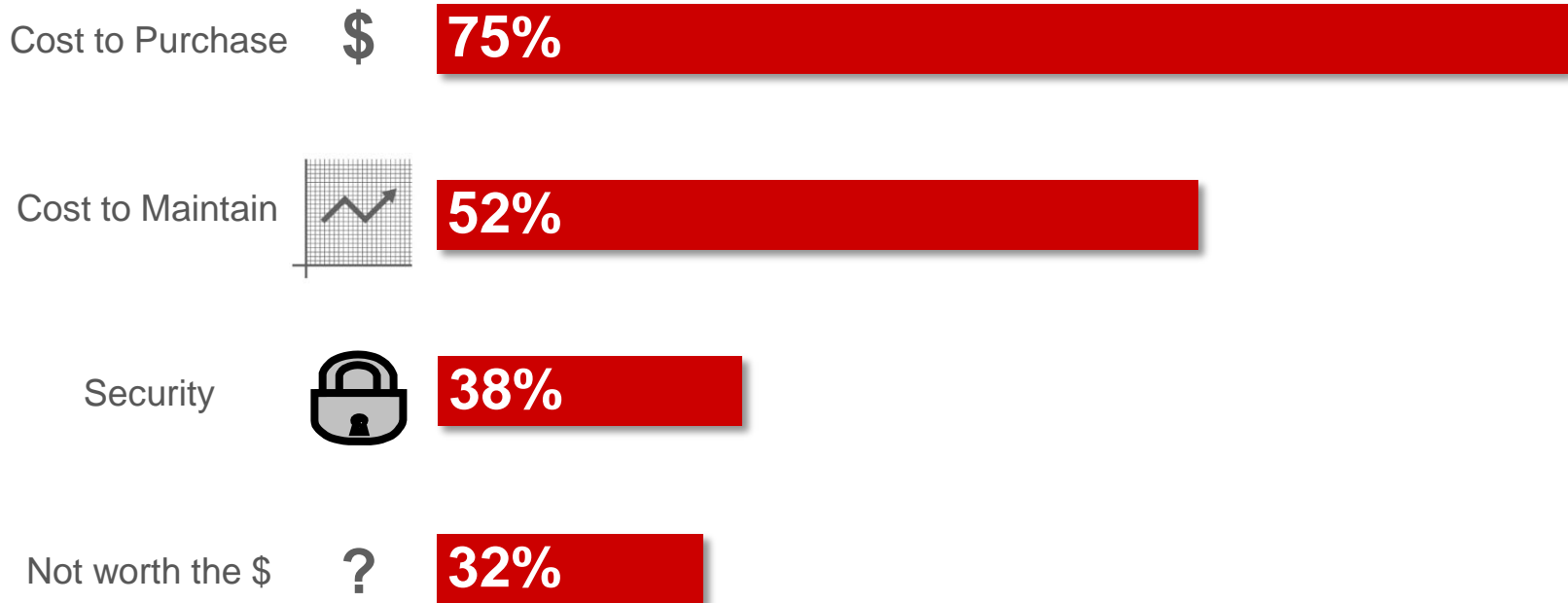


Take Away: A New Definition for “New”

Personal Barriers to Adoption

- When it comes to personal technology, cost is the primary barrier.

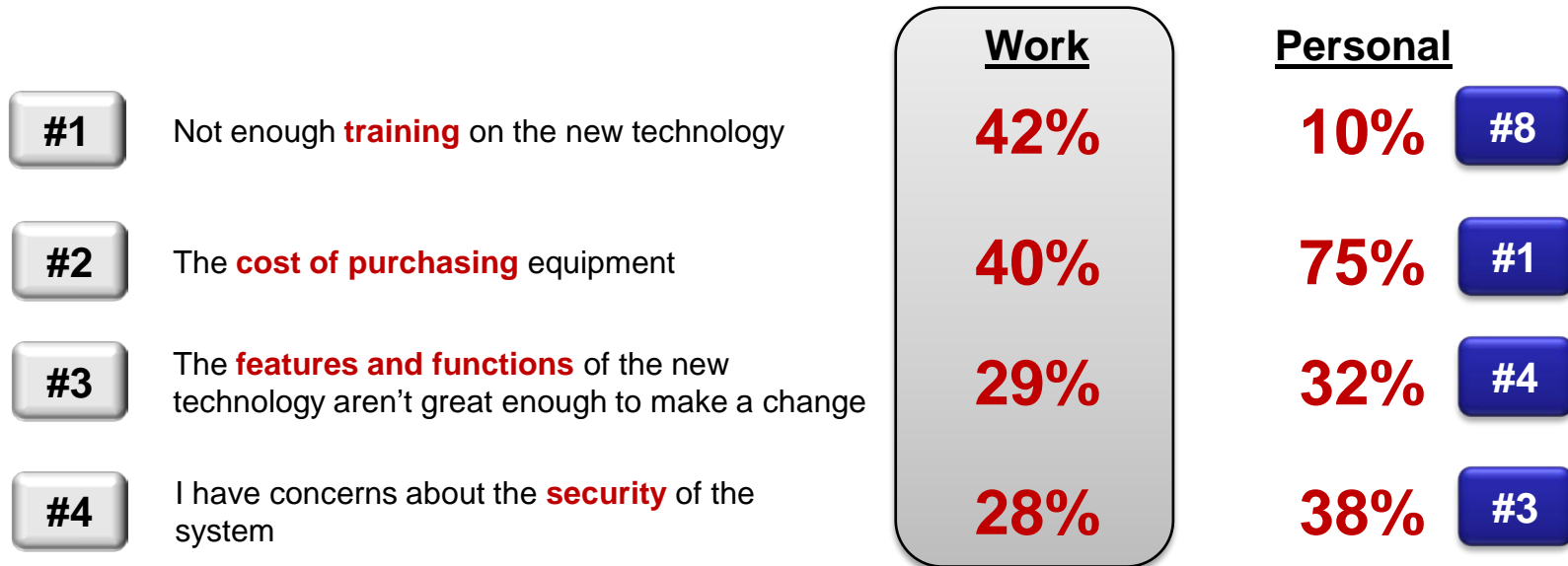
What are the biggest barriers in adopting new technology in your personal life?
(Top 3)



Take Away: More Money, More Tech

- Federal employees bring their technology adoption habits to work with them, but add a new concern to the discussion.

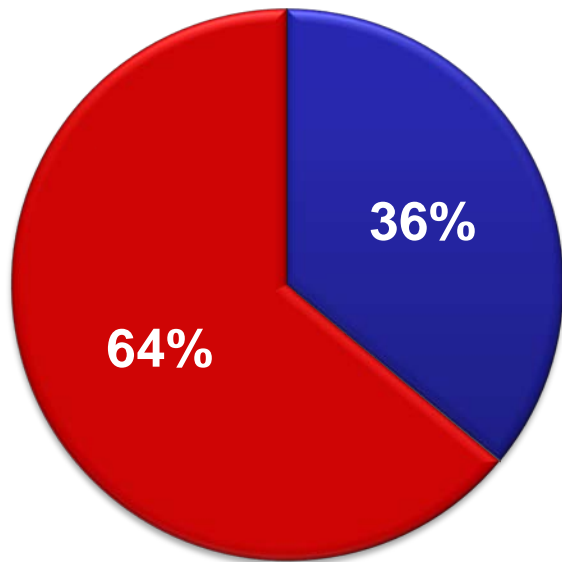
What are the biggest barriers in adopting new technology at work? (Top 3)



Take Away: If You Want Me to Use It, I Expect You to Teach Me How

- Federal employees are adopting personal technology and do not see technology adoption at work to be significantly harder.

It takes me longer to get used to new technology at work than to the new technology in my personal life.



Agree



Disagree

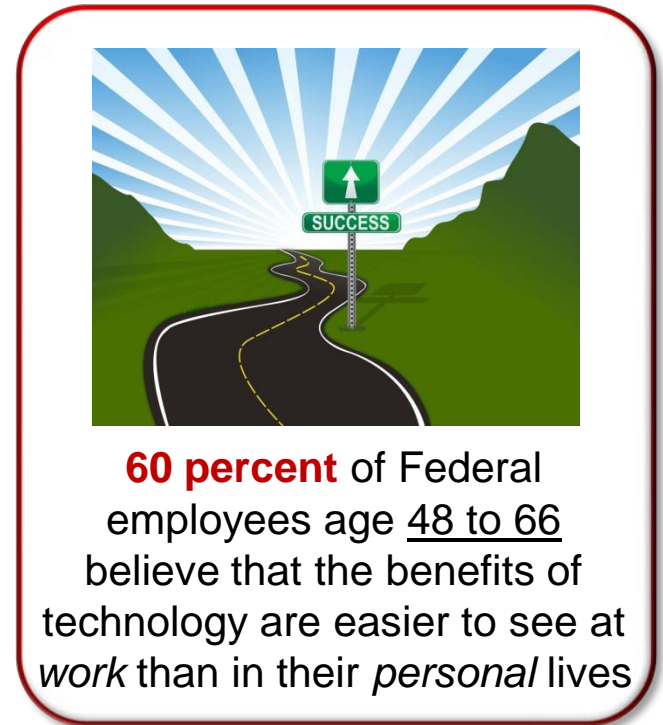
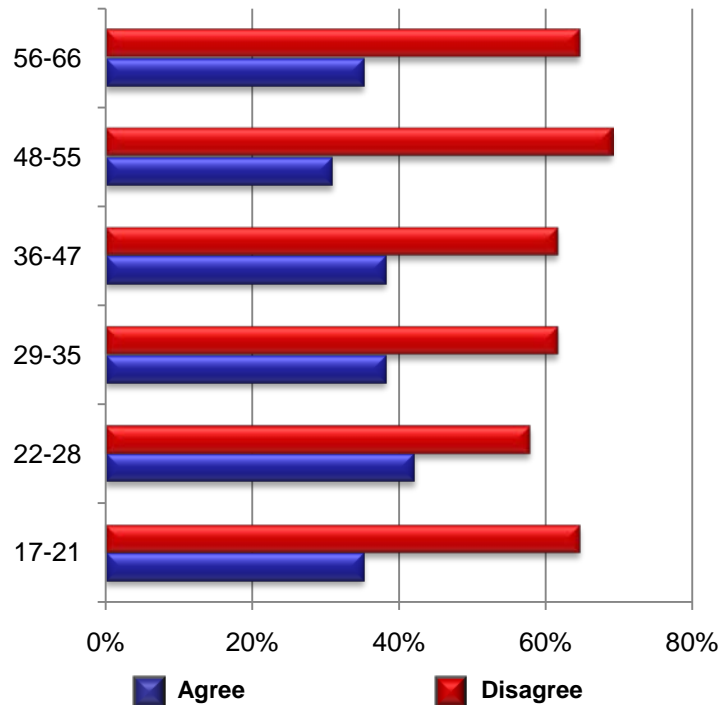


Take Away: It Isn't the Work that Makes Technology Harder

Perhaps the Reverse is True?

- Stop blaming senior Federal employees. They do not see adopting work technology as any harder than adopting personal technology.

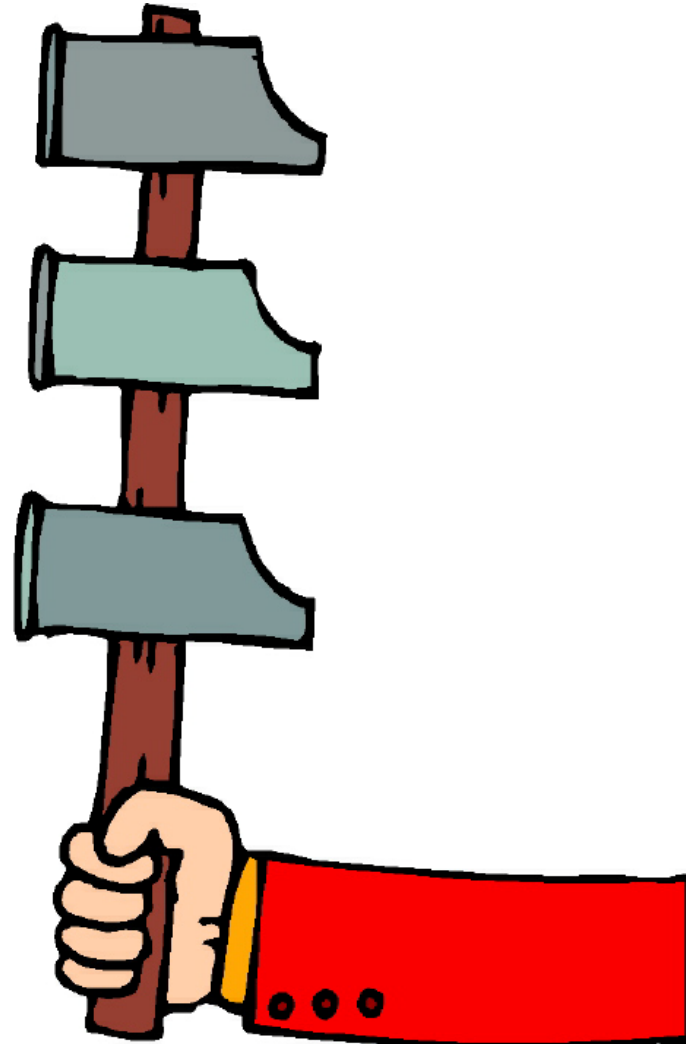
It takes me longer to get used to new technology at work than to the new technology in my personal life.



Take Away: It Isn't Age That Makes Technology Adoption Harder

What does this mean?

- Embrace the two sides of Federal employees: consumer and professional
- Train, train, and train some more. The key difference between work adoption and personal adoption is training
- Identify and harness the early adopters at all age levels to make implementation easier



- MeriTalk, on behalf of Google, conducted an **online survey of 100** Federal government employees and an **in-person survey of 120** Federal government employees in April 2012.

Age Distribution	
< 21 Years	7.7%
22 to 28	6.6%
29 to 35	21.4%
36 to 47	21.4%
48 to 56	25%
56 to 66	15.5%

Agency type:	
50%	Federal Civilian
50%	Department of Defense or Intel

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