Executive Summary

As the largest generational cohort in history, Gen Z's attitudes and expectations should be central to shaping their future.

The Covid-19 pandemic has been a generation defining event, and as members of this generation mature and become future leaders, consumers, workers and voters, their views are incredibly important.

The decisions and investments that global governments and public sectors make today, will have a significant and long-lasting bearing on the societies and economies that future generations inherit.

The challenges being faced today across many facets of public life are well documented. From the cost of living to energy supply, geopolitical conflict and healthcare, the scale of the task facing decision makers is vast.

What is clear from our findings is that Gen Z views the role of technology as central to addressing and preparing for some of the greatest challenges we face today, and will face in the future.

This research explored Generation Z adults' (18 – 26 years) views on how smart digital investments today can support the development of a digitally resilient future. Designed to guide governments, policy makers, and communities, we explored how technology could help:

1. Build resilient economies of the future
2. Play a role in sustainability, health, and the future of work
3. Master our digital futures

KEY FINDINGS AT A GLANCE

ON GOVERNMENT TECHNOLOGY INVESTMENTS

Our findings suggest that Gen Z's confidence in public sector technology investments to deliver a flourishing economy within 10 years is in the balance: a third (32%) have low or no confidence, while 38% are undecided and 29% have high or total confidence. **This suggests that there is an opportunity for governments to show Gen Z that they can invest well in their country's digital future.**

Policy Recommendation: Highlight Successes/Show Impact

Governments should highlight how their technology investments will benefit their country's digital future by demonstrating the problems they are solving, as well as the short and long-term impact those solutions have on communities, societies, and economies. For example, hospitals might highlight recent technology investments in healthcare that resulted in shorter wait times (cited as the primary reason Gen Z put off health care visits over the past 2 years) and enhanced access to overall healthcare services.

ON THE ROLE OF TECH IN ADDRESSING SOME OF OUR GREATEST CHALLENGES

Gen Z views investment in technology as key to securing universal internet connectivity, enhancing digital healthcare, improving digital access to central government services, and bettering digital education.

Almost two thirds (64%) believe that technology will play an important role in the fight against the climate crisis.

To support sustainability, Gen Z ranked sustainable energy, enabling a circular economy, and more sustainable public transport as the top three areas for governments to prioritize.

Asked for their views on where governments should prioritize investments to help close the digital divide experienced across different locations, demographics and socio-economic groups, Gen Z sees access to devices and connectivity for disadvantaged groups and connectivity in rural areas as the top priority.

Thinking about the digital services they expect to use in their 20s and 30s, Gen Z would like governments to invest in enabling access through connectivity and devices, digital healthcare, and digital access to central government services.

39%
of Gen Z believe governments should prioritise the creation of circular economies

Given the importance that Gen Z places on the role of technology in the fight against the climate crisis, governments, schools, businesses, and those involved in fighting climate change should consult and collaborate with Gen Z, work towards building circular economies, and ensure that technology is being invested in and leveraged as part of this fight.

Policy Recommendation: Leverage Technology and Partnerships to Create Circular Economies

The public sector should lead this effort by utilizing energy-efficient, scalable technology (IOT, AI, Cloud) to help identify, analyze, and prioritize climate-impacting challenges within their communities, then work with the private sector to address the challenges together. Collaboration through sharing insights and supporting enterprises between public and private sectors will demonstrate sustainable development practices and goals.

ON DIGITAL SKILLS

With digital skills gaps presenting a mounting challenge for global governments and industry sectors to address, Gen Z wants sufficient provisions to be put in place to enable expanded learning opportunities both through education and as part of professional career opportunities.

Gen Z recognizes the value of developing digital skills to help with their future careers and improve their chances of continuous employment. However, many said their education could have better prepared them with digital skills. Over two-fifths (44%) of respondents said that school only taught them very basic computing skills and around one-in-ten (12%) did not receive any education in technology or digital skills at all.

Collaboration and partnership between industry, schools and education-focused community organizations would help to better prepare future generations for the world of work.

44%
of Gen Z generally feel as though both schools and businesses should work together to bridge the digital skills gap

Policy Recommendation: Bridge the Digital Skills Gap Through Innovative Partnerships & Programs

The public sector should partner with the private sector to expand existing technical and STEM training programs to different audiences. For example, Dell Technologies' Student Tech Crew has partnered with high schools throughout the world, leveraging an existing Dell Technologies technical certification program to prepare high school students to enter the workforce with demonstrable skills.

ON SECURING AND PROTECTING DIGITAL ECOSYSTEMS

With cybercrime on the rise, and having significant impact across many sectors and aspects of digital life, Gen Z expressed strong support for robust legislations and investment in cybersecurity to protect national infrastructure.

Asked how this should be achieved, Gen Z said that governments and businesses should work together and hold each other accountable.

Given that cybersecurity is a cornerstone of the digital ecosystem, it is crucial that global governments, industry partners and stakeholders work together to build a safe digital space for now and the future.

38%
suggest a partnership between governments and business to build safe digital ecosystems

Policy Recommendation: Build Trust Through Transparency, Education and Partnerships

Governments should build trust and public awareness about cybersecurity through transparency, education and private sector partnerships built around best practice sharing.