

KAIROS
FUTURE

Global Youth

2013

1 survey
11 countries
6500 young voices





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Introduction

For more than two decades we have followed the values, aspirations and attitudes of young people. Starting at the end of the 1980s with surveys of young Swedes, we expanded the scope to the Nordic region in the early 2000s, and conducted our first truly global study in 2006/2007 when we interviewed 23,000 of the young and middle-aged, from 17 countries around the globe, in our first Global Youth study. During the last five years we have followed up by mining hundreds of millions of blogs, microblogs and forum posts in more than 15 countries, hunting for the unknown unknowns in the fields of youth values, attitudes and lifestyles. And over the years we've published numerous books, written hundreds of reports, and given thousands and thousands of presentations on various aspects of youth, work, consumption, lifestyle and society.

During this period, we at first witnessed a steady trend of increased individualism, post-materialism and striving for self-expression. However, in the late 2000s we saw the trend bending. The youngest generations were no longer the ones with the most extreme values; the "extremists" were still the now 30 year-olds, born around 1980. We primarily identified this new pattern in our Swedish longitudinal studies, but gradually reports from other countries began to strengthen our hypothesis. Something new was about to happen, something that this year's Global Youth study confirms.

A SNEAK PEEK OF THE FUTURE

The reasons why we've been so interested in young people's views are three-fold. Firstly, of course, young people's values and attitudes are important per se, since the young are employees, students, consumers and citizens. Secondly, it is the youth that set the trends in society; what young people do today, older generations tend to do tomorrow, simply because it is the young, fresh generation that usually experiment with new technology, music and behaviors. Finally, and possibly most important, young people's values provide a glimpse of the future, since we tend to stick to the values we acquire during our formative years. Naturally, as life moves on we cannot express our aspirations as we once did. Starting a family, for instance, puts restrictions on what you can do. And as society changes, so too the priorities of generations alter. But these do not mean that you abandon your most fundamental values and ideals. This value consistency is the main reason generations and not only age groups differ in terms of values, attitudes and lifestyles. So we are proud to present a glimpse of the present through the eyes of the young, and a sneak peek of the future through the aspirations of today's Global Youth.



Mats Lindgren, CEO, Kairos Future



In the midst of a new beginning?

One thing is certain, it is impossible to ignore the roars of the young around the world, as unemployment rates spin out of control and economical, environmental and political crises deepen. According to the ILO, an estimated 73.4 million young people worldwide (12.6%) are expected to be out of work in 2013. Youth uprisings in North Africa, Greece, Spain and the Middle East all express the same desperation, mistrust and anger. And as new technology, smartphones and social media have joined revolutionary waves from different parts of the world into one big tsunami, the voice of the young is stronger than ever before.

It is not the first time in history that young people set the agenda for the future. In the late 1800s the youth marched for democracy and human rights. In the 1930s they fought for strong leaders, and in the '60s and '70s they fought against them – protesting Vietnam, and battling for the environment and sexual liberation. But what do they want now, when the world is at a new turning point?

In Kairos Future's survey on the Global Youth, 16-29 year olds in eleven countries seem to agree on one point: in order to have a future we need a common goal. And today that goal is not to be seen anywhere.

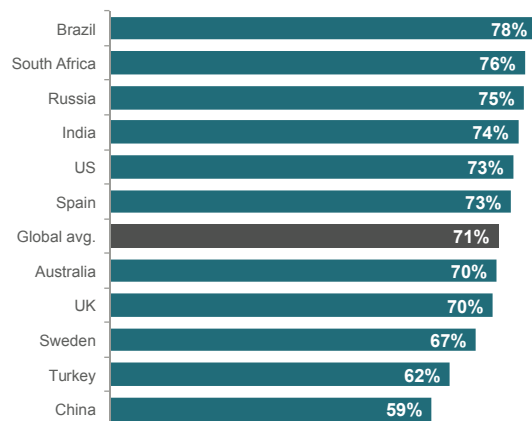
The discontent among young people around the world cannot be mistaken. In all surveyed countries except Sweden and Russia, the youth is convinced that most people in their generation will be worse off than their parents. A majority also states that society has become too individualistic, and that it is politics that is to blame: today's politics are seen as shortsighted, paying too little attention to critical

long-term issues. This opinion is strongest amongst the young of Brazil, South Africa and Russia.

And, perhaps as a result, it seems that young people have at the same time given up on politics. In the ranking of their interests, politics is at the bottom, after health, sports, fashion and computer games, to name just a few. Though young people have identified the problem – the political system and its lack of long-term responsibility – they have very little interest of joining that system themselves in order to change it.

Instead all their dreams and aspirations are focused on another arena – the personal one. The small, close collective: the family. And when it comes to family young people are anything but short-sighted. They want relations that are so strong they will hold a lifetime. According to them, the achievements that are most worthy of respect are not making lots of money or saving the world, but being a good parent and

Today's politics are too short-sighted and pay too little attention to critical long-term issues (% 'agree')





keeping a family together for years. The small dreams about settling down seem to be the dreams the young can hold onto in turbulent and uncertain times.

A CRY FOR RECONSTRUCTION?

Building your own family that you can keep safe in a nice home may be a reaction to the postmodern values that the baby boomers, born around 1950, and the subsequent generations have boosted in the west – individualism, depending on yourself regardless of gender, no requirement to get married or adjust to convention. It has been a project with a goal to deconstruct old and traditional institutions and patterns. Since the 1960s people aged 20-25 have had the most 'extreme' attitudes and values.

But not so any more, it seems. Instead of deconstructing the traditional values, young people today seem to long for the reconstruction of collective values. And they're starting with the small world, by rebuilding the family. Their hopes for the big world are common goals and the end of short-

sighted politics. After all, it is the youth that will benefit the most from long-term commitments and goals.

Welcome to the world according to the Global Youth.

of the Global Youth
believe society has become
too individualistic

WHO ARE THE YOUNG?

In this survey, youth is defined as people between the ages of 16 and 29. The respondents are therefore all born between 1984 and 1997.

This generation is often referred to as 'millennials', while sometimes called Generation Y, Generation Me, or the MeWe Generation. In this report we refer to them as the Global Youth, since the young we've interviewed are from all over the world and have one thing in common: through smartphones and the internet they are connected to people, networks and ideas that go far beyond local boundaries.

Do the young agree with our definition of youth? Yes, they do. According to the respondents, people stop being young on average at the age of 26, and are expected to start a family at 27. Thus, we believe, that 29 could be a fair approximation for the upper range of a 'youth community'.

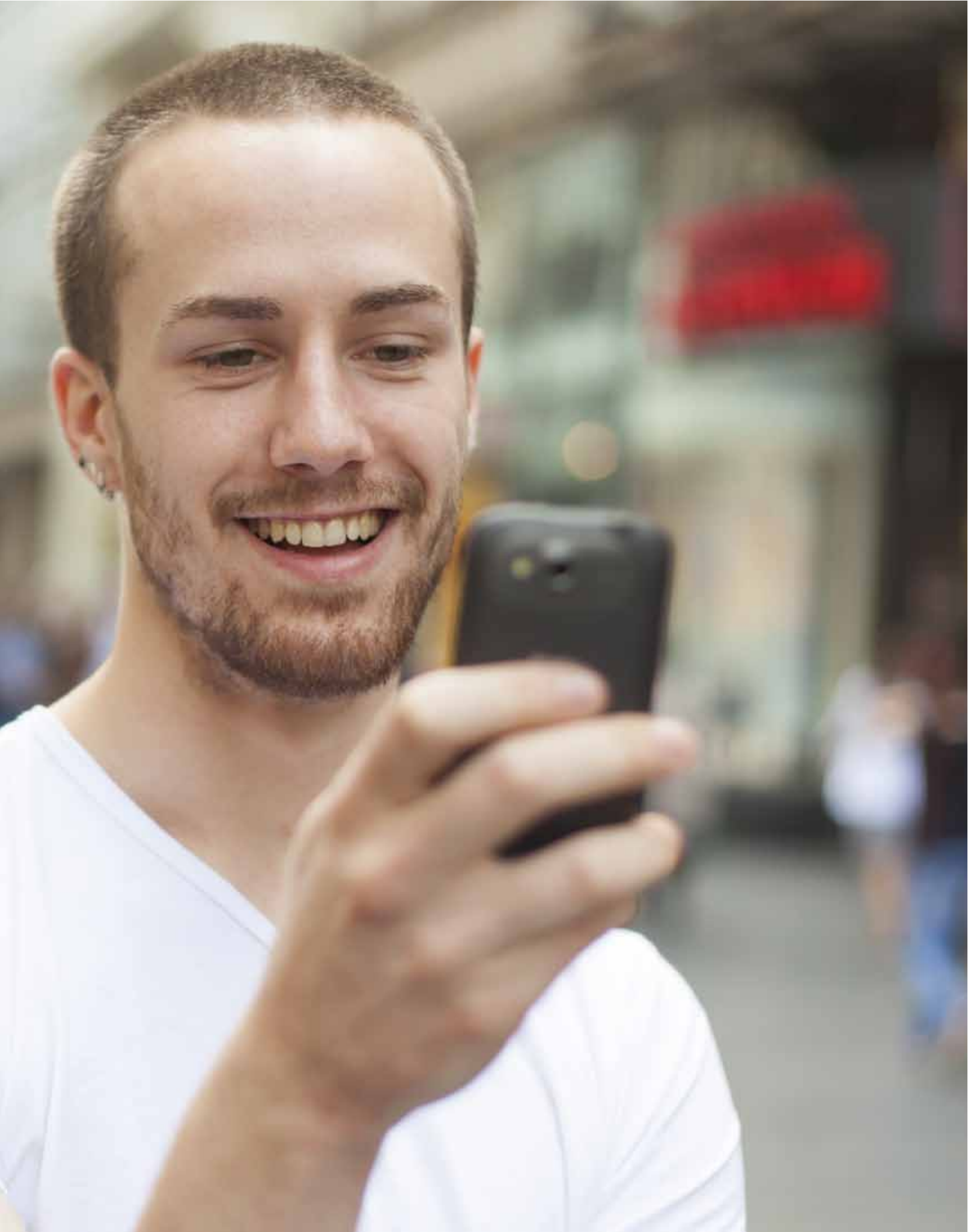
BRIC, BRICS, BRICST

In 2010 South Africa was included in the BRIC-countries and BRIC became BRICS. In this report we include Turkey in this association of fast-growing economies and emerging powers and use the term BRICST.

In some parts of the report we have found that a comparison between the BRICST-countries (Brazil, Russia, India, China, South Africa and Turkey) and the rest of the countries in the survey (US, Sweden, UK, Spain and Australia) makes the analyses of the global results deeper and more accurate.

Countries surveyed

Sweden	1000
China	1000
Australia	500
Brazil	500
India	500
Russia	500
South Africa	500
Spain	500
Turkey	500
UK	500
US	500



The youth that wants to grow up

Dreams and aspirations in turbulent times

What do young people dream about? Like everyone else, a myriad of things: from audacious goals of fame and fortune to humble dreams of a happy family. However, amongst the multitude of dreams, there are two in particular that stand out – the dream of a nice home and the dream of a good job. From the UK and Sweden to Australia and the US, these two top the charts, making them the most coveted elements of the Global Youth's future.

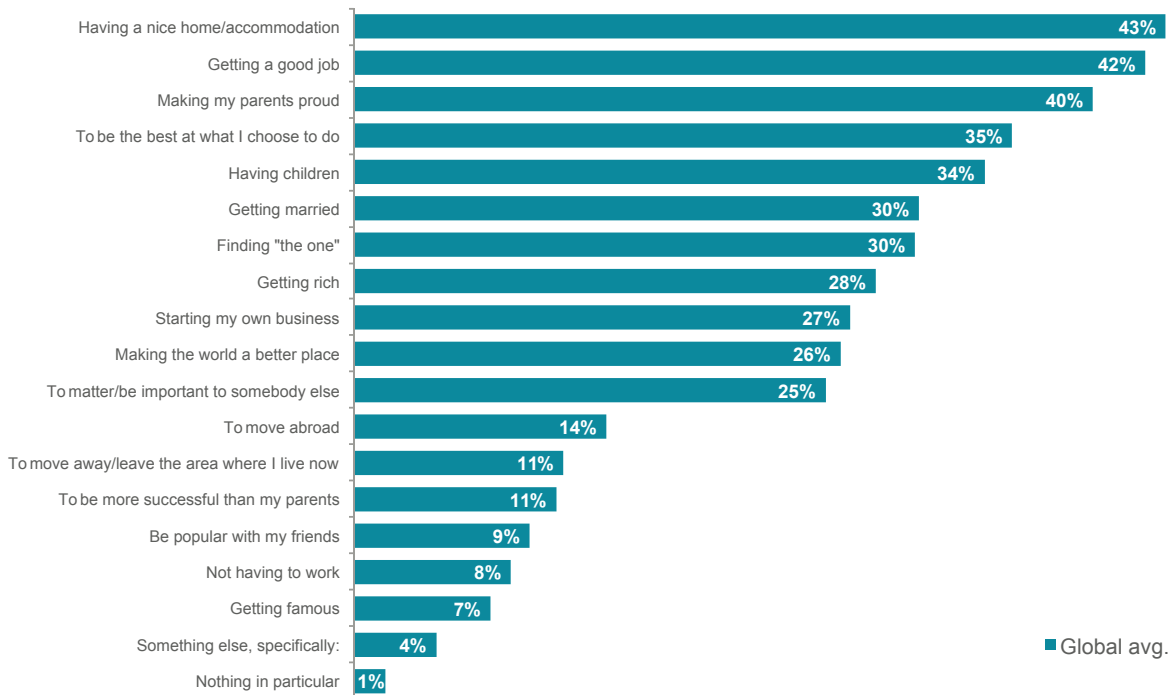
Have former generations' rebellious chants of peace, love and understanding – and never growing up – been replaced with the more mundane triad of jobs, home, and a family? Our survey would seem to suggest, yes.

59%

is the share of Indian youths mentioning "making my parents proud" as a one of their top three dreams. In Russia, only 20% do the same.



When you think about your future, what do you dream of? (multiple answers allowed)



MY HOME IS MY CASTLE

They say our home is our castle. Perhaps this can explain why the dream of a nice home is the most frequently mentioned dream among the Global Youth. For, after all, when is the safety of a nice home more in demand than in uncertain and unfriendly times? In the early 1990s, trend forecaster Faith Popcorn coined the term 'cocooning' to describe our tendency to withdraw to safe havens (homes) in order to shelter ourselves from exterior environments perceived as chaotic or unfriendly. Judging by our survey, today's youth do indeed seem to fit this description, as nice homes, proud parents and having children trumps dreams of fame, fortune and world betterment.

Young people in most countries are keen to live overseas at some point in their life. But they're not keen to stay away. Only 11% dream of leaving where they live now, and travel is one of the least important aspects of their future careers. For the Global Youth, 'overseas' is recreational – they keep an eye on abroad, but from the sands of their own coastline.



WANTED: GOOD JOBS

Job wars, jobless growth, the end of work and races against machines – the question of good jobs (or lack thereof) has figured prominently in the global media over the last four years, and the message has not been lost on today's youth. In the crisis-ravaged Spain the dream of a good job is particularly strong, being mentioned by 59% of Spanish youth, but it also tops the lists in the US, Sweden and Turkey.



**FOR BOLD DREAMS,
GO TO BRICST (INDIA IN PARTICULAR)**

As the world’s economic center of gravity shifts away from the west, so, one could argue, do feelings of optimism and boldness. In our survey for instance, Indian youths are far more likely to describe their dreams as grand and ambitious than small and down to earth. Whereas globally 49% of young people describe the nature of their dreams as grand, this share is 65% in India. And, indeed, the nature of dreams does seem to differ. In India, ‘being the best at what I choose to do’ and ‘getting rich’ are two of three most frequently mentioned dreams, surpassed only by the dream of making one’s parents proud.

**Dreams more common
among BRICST**

	BRICST	WEST	DIFFERENCE
Starting my own business	36%	16%	20%
Making my parents proud	43%	35%	8%
Getting rich	31%	24%	7%

**Dreams less common
among BRICST**

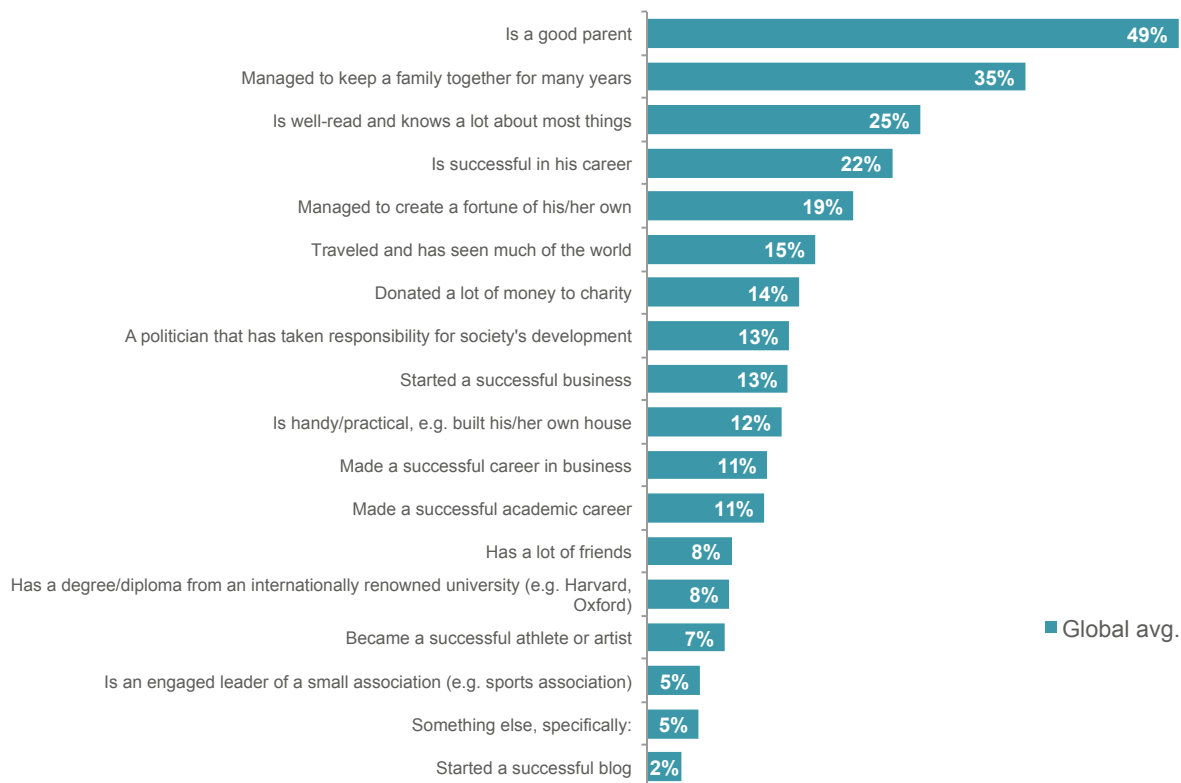
	BRICST	WEST	DIFFERENCE
Getting a good job	36%	49%	-13%
Having children	28%	40%	-12%
To matter to somebody else	19%	32%	-13%

“I want to start my own company for the independence that comes with it, and the feeling of having done something worth-while, something that will leave a mark behind on this earth.”

Indian girl, 20 years old from Bangalore



Of the following, which do you believe is most worthy of respect? Is it a person that...
(multiple answers allowed)



FAMILY-LIFE MOST WORTHY OF RESPECT

Young peoples' dreams of the future focus on the success of the small life: getting a good job and being able to afford nice accommodation. But that's not enough it seems. The home must be filled with something meaningful too, something which may be more difficult to achieve: namely, a family. Having children, getting married and finding the 'right one' are also popular dreams among the Global Youth.

Many of today's young experienced divorces when they grew up, or at least had friends growing up in divided families. And, perhaps as a consequence, the ones who are most worthy of respect, according to the young, are those who have succeeded in family

life. 'Being a good parent' and 'keeping a family together for many years' top the respect list. These are far more worthy than having a successful career in business or becoming a successful athlete or artist. Families deserve respect, so say the Global Youth.

Worries, big and small

Unemployment, the environment and war

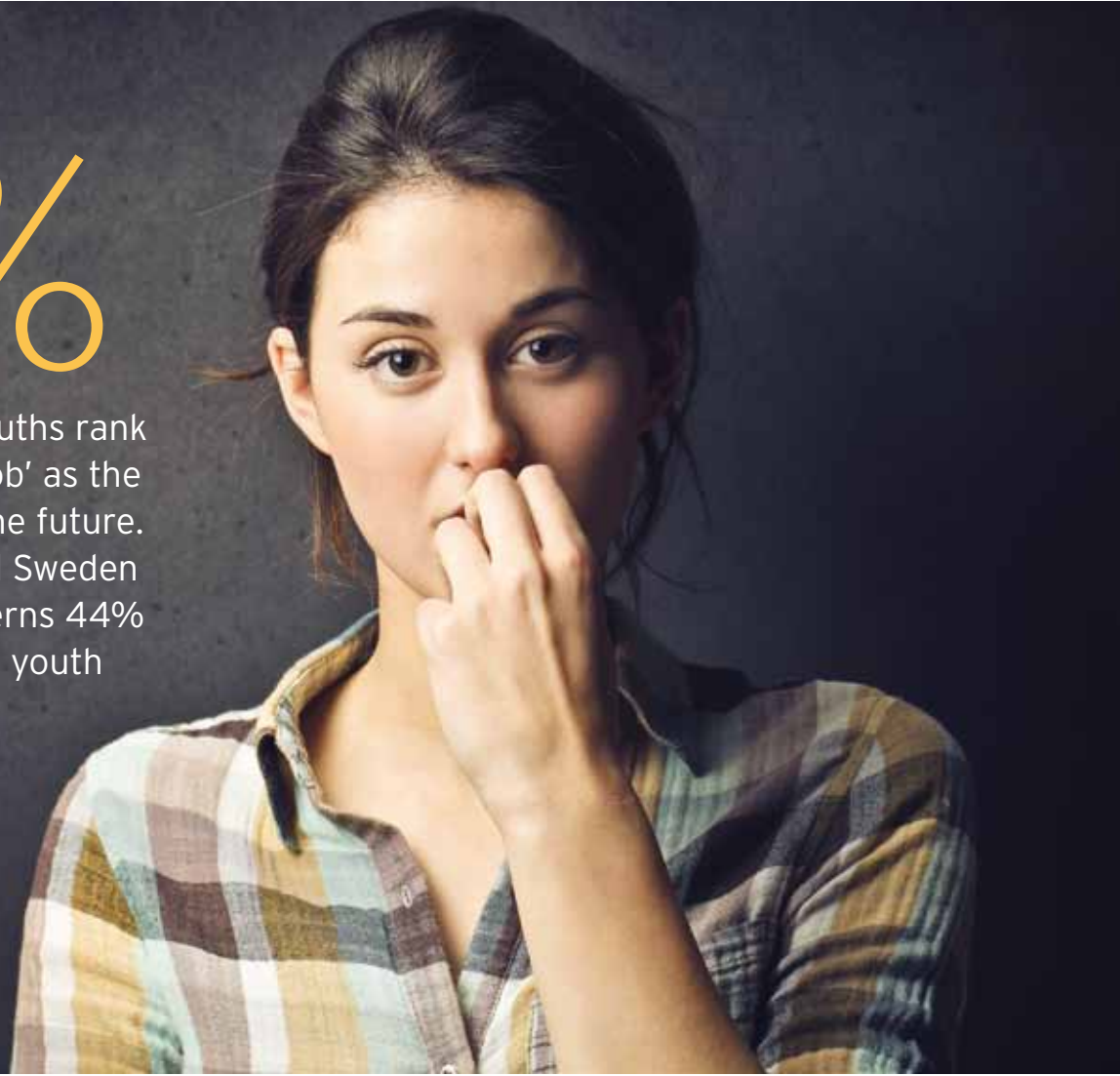
The number one worry among the Global Youth is being unemployed. This fear is particularly strong among the youth living in countries where unemployment rates are high.

Youth living in fast-growing economies like China and India worry first about big threats such as wars, criminality, and illnesses, whereas the young coming from western economies are more concerned about their own future stability and security.

Does that mean young people no longer worry about the environment? Absolutely not! Environmental degradation is the second biggest worry for the future, together with war.

56%

of Spanish youths rank 'not getting a job' as the top worry for the future. In Australia and Sweden this issue concerns 44% and 43% of the youth respectively.



THE PHANTOM OF UNEMPLOYMENT

With unemployment rates reaching levels not seen since the Great Depression, worries about finding a job are immense among young people. For more than a third of the Global Youth, not finding a job constitutes their number one worry for the future, this being ranked highest in Spain, Australia, Sweden, UK, and US. Some even believe that society is running out of jobs. However, the phantom of unemployment has not yet entered the minds of the youth coming from the BRICST countries. Among this group, the worry of being unemployed is relegated to sixth position. So what do the young in the BRICST countries worry about?

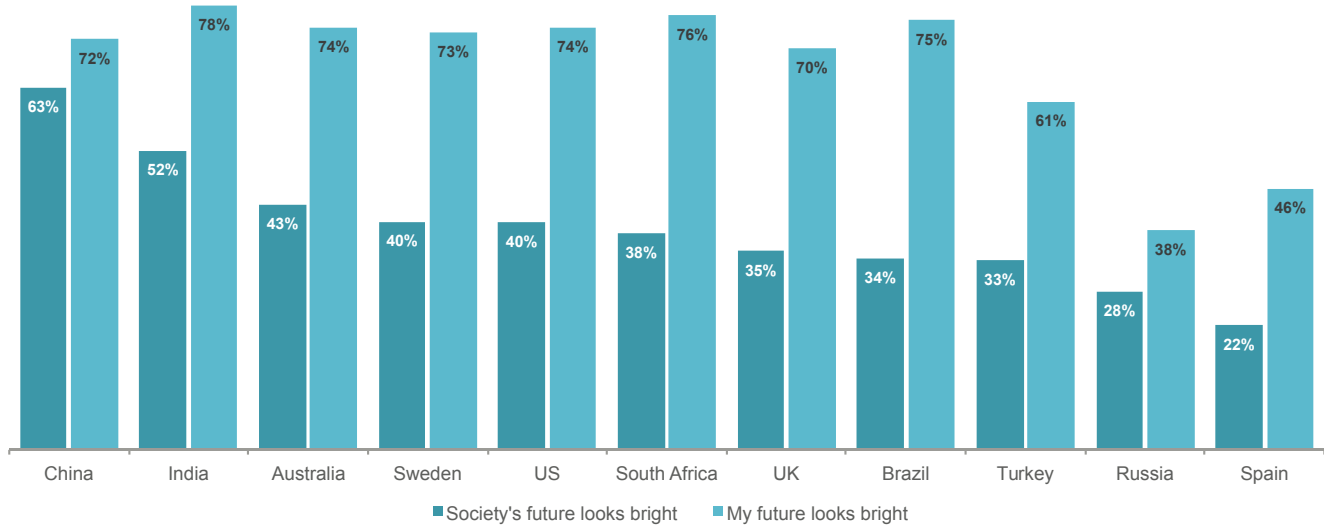
GLOBAL WORRIES IN THE BRICST, LOCAL WORRIES IN THE WEST

The answer is very much linked to the country's economic situation. In line with the bright economic perspectives of the BRICST region, young people here worry more about major societal issues like criminality, illnesses or pandemics, wars, and corruption. This is also influenced by the countries' societal structure, geographical situation, and political system.

On the other hand, the youth in Western countries tend to worry first about the 'little world' and everything linked to it. Not getting a job, not finding a partner, and the possibility of becoming poor in the future are all big concerns. Tellingly, the second biggest worry amongst the American youth is the collapse of the financial system.



Two types of optimism



BRIGHT FUTURE, JUST NOT FOR SOCIETY

The scale and nature of the youth's worries have a strong influence on their view of the future. Amid the economic crisis and the turbulent situation in countries worldwide, the young remain optimistic about their individual futures. Overall, nearly seven out of every ten think their own future looks bright, even though as much as half of the youth is convinced that most people in their generation will be worse off than their parents.

The picture changes dramatically when asking about the future of society. Here, pessimism takes over and only 39% see a bright future. The biggest negative change from the study in 2006/2007 is found among Indian youth, where 27% fewer young

Indians think society's future looks bright now.

So what makes the young more optimistic? First and foremost, the ones who are optimistic about the future of society are more likely to feel they are a part of the society they live in, and this sense of belongingness is expressed in many ways. They are more likely to think that democracy is the best form of government for their country, and they are more likely to trust their national government and the police and justice system. They are also more prepared to pay the taxes required for the pensions of older generations. They also believe more strongly that technology will solve the problem of global warming.



Share believing it is too late to stop global warming (Top 5)

India	43%
China	42%
Turkey	40%
UK	38%
US	38%

Share believing technology will be able to solve the problem of global warming (Top 5)

India	60%
China	58%
Russia	55%
South Africa	50%
US	49%

TOO LATE TO STOP GLOBAL WARMING?

What about the environment? Aren't today's young a green generation? Environmental degradation is the second most common worry among the Global Youth, with the Swedes, Indians and Chinese the most concerned. Not only that, as many as 60% state an interest in the environment and sustainable development. And so does the youth feel there is a solution to global warming? Opinions are evenly spread. Nearly half of the young are optimistic and believe technology will be able to solve the problem, but as many as 30% think we have crossed the point of no return. This seems paradoxical, seeing as more than 70% think it possible to change society through their own actions.



Take the next left

The cry for a rational society

The Global Youth's desired society requires change: societal, structural and political change. Today's youth dream about a rational society that favors such change over stability. They also dream about a different tax system, one that is better suited to meet the challenges of our time, especially those of the environment. They are pro-protectionism and anti-international regulation, despite the fact that they put more trust in the UN than their own national government. Equal opportunities for everybody, regardless of sex or origin, are also desired, as is freedom of choice for all.

Perhaps most noteworthy is the craving for political change. The majority of the young yearns for more long-sighted politics, and thinks society would benefit from working towards a common goal. The idea of a world government is growing in popularity, maybe fueled by the lack of trust in national governments. It seems as though, in turbulent times, trust is hard to gain but easy to lose.



LEFT IS THE WAY!

Recall the French revolution's *liberté, égalité, fraternité*? Well here it comes again. Social equality, science and rationality, a strong welfare system, and equal opportunities – these are top attributes of the ideal society for the majority of the Global Youth. They are characteristics that tend to be linked with a leftist political view, and it seems the young are aware of this as more than 60% describe their political slant as leaning to the left. Possibly, though, it's more a liberal than a socialist left they think about, since a majority dream of a society that rewards the individual's effort and hard labor. The youth also dreams of a greener society, one that is based on ecological and social sustainability, and one that taxes consumption and natural resources rather than labor.

BLEND IT AND MEND IT

The globalized world we live in lets people move from country to country on a constant basis. This trend is not unfamiliar to the Global Youth. In fact, more than half of them have friends living abroad, and one in five have already studied or worked in another country for a period of time. This more

international and mobile mindset positively impacts on the way they view immigration.

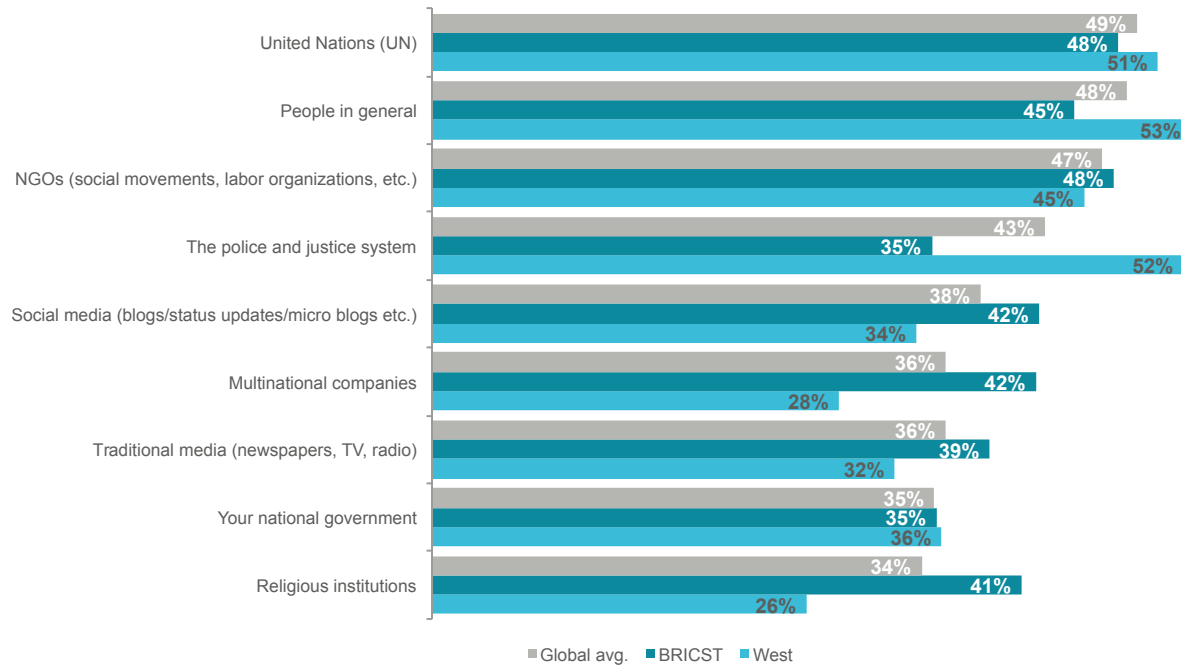
Globally, almost half of the surveyed youth think immigration contributes positively to their nation's culture, and as many as 60% prefer to live in a place where there is a large mixture of people. This attitude also affects the way they imagine their ideal future society: as one that provides equal opportunities for immigrants and natives.

48%

is the share of global young who attribute their ideal future society with 'change'. Only 20% say the same of 'tradition and stability'.



To what extent do you trust the following? (% reporting having trust)



TRUST WHOM?

Tough economic circumstances, drastic measures adopted by governments to cut debt, and never-ending cases of political corruption are brutally damaging the youth's trust in their national governments. Only one in three trusts theirs, making them the least trusted institution on a global level after religious institutions. The most distrustful youth are found in Spain and South Africa, where confidence in the national governments are below 20%, whereas Chinese youth show the highest trust in their government. Compared to the results of the 2006/2007 survey, British and Swedish youth trust their national government more now than six years ago (an increase of 24% and 22% respectively), whereas Indian youth

trust it less (a decrease of 26%).

It looks like the trust of the young is something that is hard to gain. Especially in current times, youth prefer to put their trust in the United Nations and people in general than in national politicians. That the United Nations is the most trusted organization might come as a surprise, given that a majority describe their ideal society as one that protects their national industry, and seeing as very few seem interested in global tax systems. Also odd is that the Global Youth favor a future society where law and order prevail, but that the police and justice system scores lower than NGOs in terms of trust. But then, to whom can the youth turn when so many institutions have let them down?



Share believing democracy is the best form of government for their country

Sweden	80%
Turkey	78%
UK	74%
India	74%
Brazil	72%
China	69%
US	65%
Australia	65%
South Africa	65%
Spain	63%
Russia	49%

IS DEMOCRACY FIT FOR THE CHALLENGE?

People tend to think the youth are not interested in politics. That might be partly true, as only 36% of our respondents say they are, but state at your peril that the young lack opinions. Nothing could be further from the truth.

The young are indeed disappointed with politics today. For instance, globally as many as seven in ten think today's politics are too short-sighted, and the same share would like to see society working for a common goal. Moreover, half think there is a need for a 'world government' to solve the problems of our time. Still, young people are not actively doing much to change the course of politics, with less than a tenth contacting a politician in the last 12 months,

or actively participating in a political organization. It looks like today's youth commit in more passive ways, by signing appeals and petitions online, or using social media to spread information about political causes.

Despite the disappointment with today's politics, a clear majority is convinced democracy is still the best system for their country. Doubters reside in Russia, where less than half believe that democracy is the way forward, but also in the US, where only 65% think democracy is the best government option for the present day. Interesting, given that they are one of the most powerful nations in the world.

It's personal

Work in the thought economy

So, we know that the young want good jobs. But what do they want them for? To run companies and control employees? To alleviate social malaise? Nope. For the most part, it's personal.

The youth of today see jobs as a source of self-pride – personal satisfaction is the most important aspect of their future careers. They believe in education, and they're interested in health, wellness, personal development and hard work; not in salary, status, free time or power. They are in charge of themselves, and they take the role seriously.

And, individually speaking, they are optimistic. The Global Youth are confident about their futures, although not in the future of society. Why would they be? They are only responsible for themselves, and as long as the conditions are right, they're going far.



IT'S PERSONAL

Why do you go to work? What gets you out of bed each morning? For young people across the globe, it's pride, good bosses and personal development: these were prized as the most important aspects of future careers, with 89% of the young agreeing. Yup, it appears that today's youth are interested in individual contentment and advancement, with good, 'fair' bosses to help them get there. These values weighed in much higher than the best looking job, or taking time off from it: a job with 'high status' was considered the least important determinant of future careers, closely followed by 'being able to travel', 'fixed working hours' and 'a lot of vacation and free time'. Compared to the 2006/2007 survey, youth in China and Russia think it is less important now than it was six years ago to have a job with high status (18% and 16% less respectively). The young are set on self-betterment, and even a high salary can't top this. This introspective, power-shunning youth is pepped up and ready to go – by itself, for itself.

RESPONSIBLE ME

With great power comes great responsibility. But if the young don't want the former, do they want the latter? They think responsibility is commendable: people who are "good parents", and who have "kept a family together for years", are the most deserving of admiration. And they think that children should



is the share of young Americans who think 'being visionary' is important in a boss. The same is true of nearly half the Chinese youth.

be taught, more than anything, responsibility. In an age of irresponsible bankers, politicians, footballers... maybe this isn't surprising. Unfortunately, the Global Youth doesn't seem keen to take on the burden. Only half are absolutely set on the idea of having children, let alone teaching them to be responsible. So they must want a lot of responsibility in their jobs? Think again. Not nearly as much as they want pride and personal development. It seems we have a youth willing to be responsible for 'Me', confident in their ability to steer themselves through life, but unsure what they can do for anyone else.

"I want to be responsible for my good performance, not others' bad performance"

South African girl, 26 years old from Colesberg



Top 5 sectors to work in

	BRICST	West	Sweden
1	IT/Telecom	Healthcare	Research and development
2	Travel and tourism	Teaching and education	Media
3	Research and development	Media	Healthcare
4	Teaching and education	Research and development	IT/Telecom
5	Banking, finance and insurance	Game development	Retail

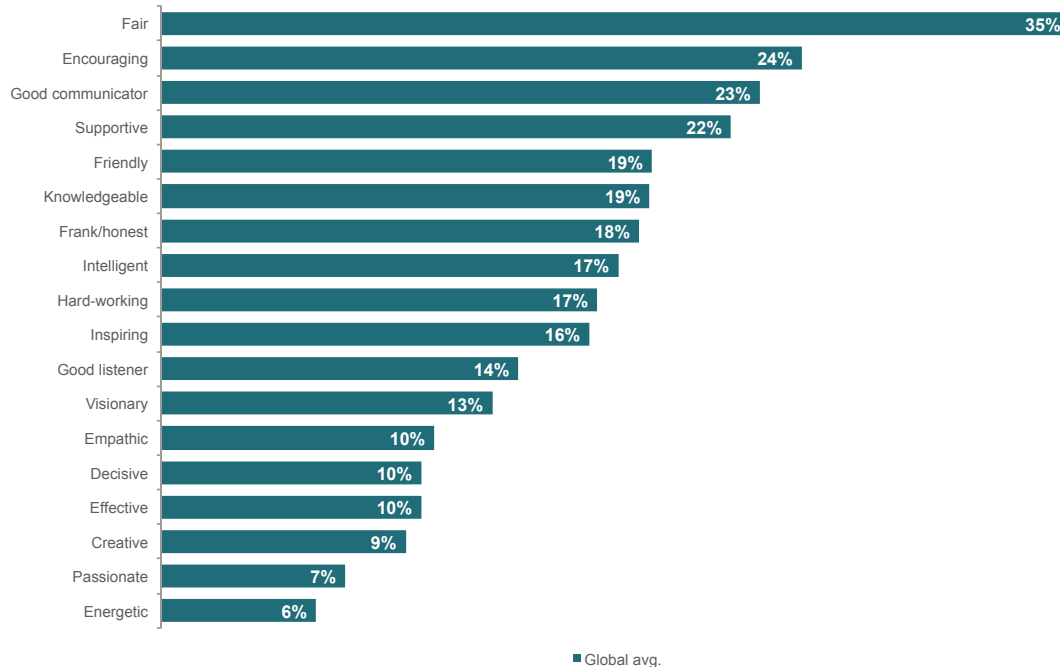
WHO WANTS TO WORK WHERE?

Well, it's the knowledge industries that score highest, with 'Research and Development' and 'Teaching and Education' as the sectors most favored by the Global Youth. Here is a youth focused on using their heads: the heavier industries of agriculture, transportation and construction were the least popular sectors to work in, and brain not brawn is valued the world over, with little difference between the BRICST and non-BRICST countries. The main differences lie in gender, with men interested in technology-based jobs, and women in those of travel, education and healthcare. In India we find the greatest accord between genders: 10% is the biggest divergence in job preference, while in South Africa it is up at 28%. Meanwhile the Turkish are the keenest to teach, the Chinese most bent on banking, and the Americans most hyped about health care.





In your opinion, what characteristics are most important in a good boss? (multiple answers allowed)



THINKING BIG

Welcome to the thought economy, a place where business is increasingly non-service and non-industrial, and where the value of ideas and concepts outweighs that of physical capital and resource. In the 21st Century, it is the company producing the most 'wows' that is the winner of the day, and it follows that 82% of the young agree on the importance of being able to 'think and see new perspectives'. They also agree that universities are fostering creative, critical and conceptual thinking, so a generation of thinkers is pounding at the door of the new thought landscape. Perhaps paradoxically, though, the young aren't looking for inspiration. Creativity, passion and energy are lowest on the list of important attributes for bosses, the young instead wanting support, encouragement and above all fairness. Again we see a young confident in their ability to go things alone, asking only for the right conditions to do so.



Totally addicted

Shallow youth in a connected world?

The results are in, the tallies totted up, it's official: young people are addicted to social media. It's as bad as we thought, and they don't even deny it. They use it for news, they use it for politics. They have massive online friend groups, to whom they post daily, and they do so through their smartphones, backed up by laptops and tablets. As ever, the youth are driving society and building community, but this time they're doing it online.

So surely all this technology has its drawbacks? Aren't they aware of the costs? It turns out only the monetary ones. The young think society is better off because of it, and they think it can solve environmental issues. Technology is good – that's the verdict – and the young are shopping for it, with it. Could it be an addiction they like to love? You bet.

38%

is the share of Global Youth who describe themselves as 'addicted to social media'.



WHY IS IT BAD...

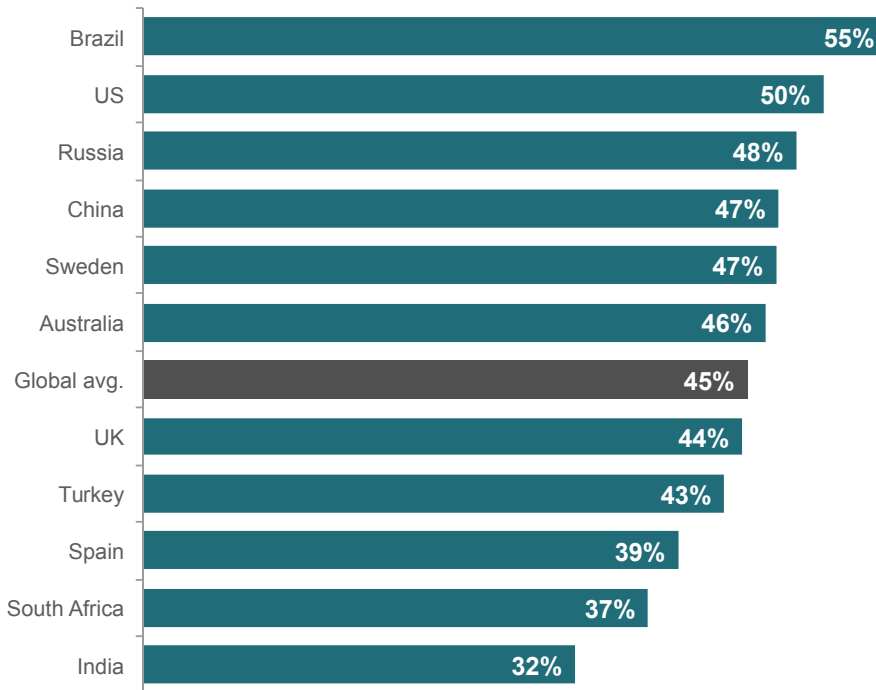
Are addictions always bad? They say that coffee is good for you, chocolate too – can't social media be the same? Among those who say they are addicted to social media, 65% have trouble concentrating. Will this inability to focus lead to a shallow youth generation? Only 37% trust the information they get from status updates and blog posts. In fact, a bare minimum saw successful blog writers as worthy of respect. But we know this doesn't mean the young are shunning the internet; half are spending five or more hours online daily, and the majority thinks people are better off with modern technology. Community has shifted from the village hall to the online forum, and the youth don't seem to lament it. So are they just becoming shallow as a result, or are there some good points?

...AND WHAT IS IT GOOD FOR?

Young people are plugged in and plied with information. Physical newspaper circulation is plummeting and digital media is quickly becoming the only media. So it makes sense that half of our youth say social media is their most important source of news. What is news but information about society anyway, and today society is online. Social media, though, is two-way. Popular is the theory that it facilitates a 'giving-back', and the young seem to agree. In the last year, a quarter said they had used social media to spread information about a political cause, and despite 36% thinking it is too late to stop global warming, another 47% believe that technology will solve it. Here is a youth that might be addicted, but that isn't to say they're ashamed.



Share of young people reporting spending five or more hours a day online



FRIENDS, FRIENDS, FRIENDS

Today's youth are popular, it is common for them to have 3 close friends, between 11 and 20 general friends, and around 200 to 300 online acquaintances. The vast difference in online friends and 'real life' friends points to the interconnectedness for which social media allows. Seeing as the young are dreaming about jobs, and seeing as 66% of them think that good connections are key to getting one, there seems little reason to doubt the value of social media to them. So valuable that it can replace real friends? You guessed it. Exactly a quarter of all respondents said they would prefer never to see their best friend again than to live without a mobile phone and internet access for two years. Talk about shallow!

Are we seeing the growth of online networks come at the expense of physical ones?

"I hate my smartphone, but without it life would suck."

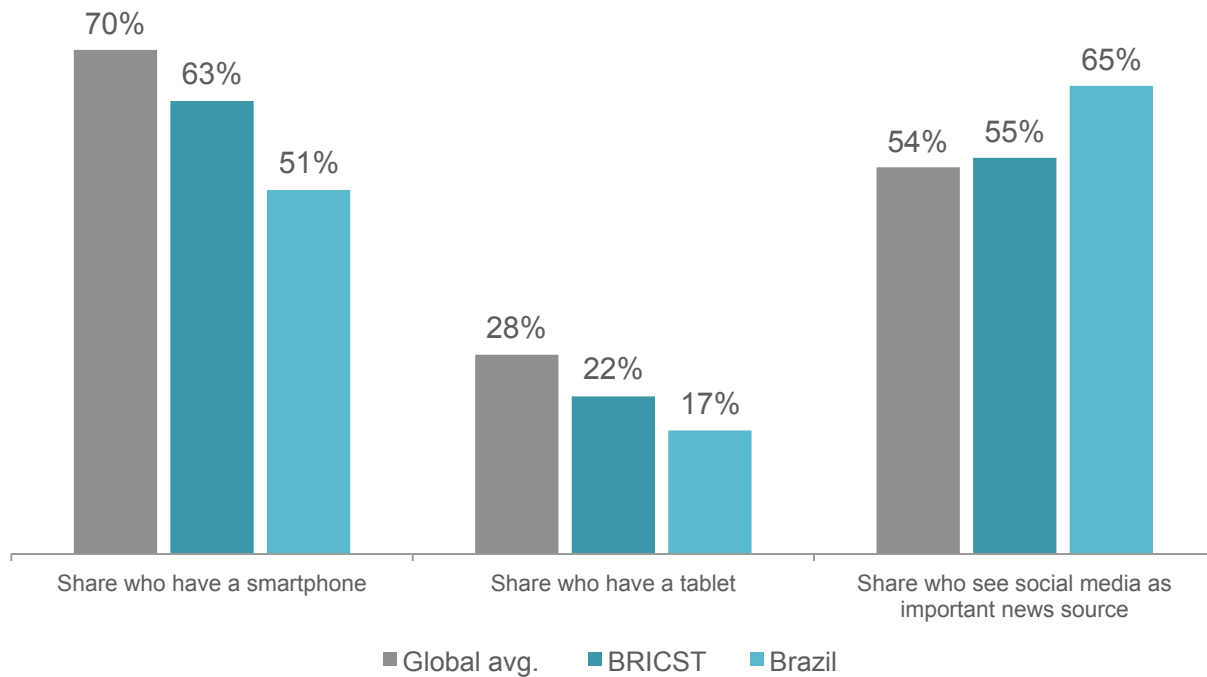
American girl, 21 years old from Lawrence

"My smartphone is my right hand."

British girl, 26 years old from Gloucester



Second screens and social media



BRAZIL - READY TO ROLL

As global focus shifts to the BRICST countries, it is little shock that their young are producing and propelling global trends. Brazil is no exception, and when it comes to social media, they are on the ball. Brazilian youth are 14% more likely to use social media as a news source than the global average, and they have by far the most contacts online, with 17% of them claiming more than 1000. So it is surprising that they have such little access to modern tools: they are well below average in their possession of smartphones and tablets, and so it is no wonder they are shopping online so little. It would appear Brazilians are keen to join the online revolution, but simply don't have the equipment to do so yet.



Please engage me

The mobile consuming youth

Six years ago when we first made this study, Apple was soon to reveal the iPhone, Facebook had barely passed 20 million users globally, and Twitter was a sound associated with birds. Today, the annual sales of smartphones topple that of personal computers, Facebook has over 1 billion active monthly users, and there are more than 250 million tweets posted every single day. Looking back, the pace of change has been astounding, leaving companies and organizations struggling to keep up.

And perhaps nowhere more so than in retail. Looking at this year's results, signs of a paradigm shift abound. Globally, more than 70% of the youth in our survey report owning a smartphone, and among those who do, more than one in four claim to use it for shopping-related purposes on a daily basis. Similarly, going online to shop comes naturally to most young, especially in China where over 80% of respondents claim to frequently shop online.

75%
of the Global Youth believe that companies ought to be better at obtaining customer feedback on their products.



What do we buy online? Visualized in the word cloud above are the open-ended responses to the question “What type of products do you typically buy online?” supplied by respondents from the US, UK, Australia and India. Word sizes correspond to frequency of mention.

MOBILITY, MOBILITY, MOBILITY

Ours is a mobile time. The fact is, over 70% of our respondents reported owning a smartphone. Of course, this share overestimates the number of actual owners, as web-surveys attract the early majority. Nevertheless, the figure is telling. For many of today’s youth, life simply wouldn’t function without their phone – it is their gateway, not only to friends, music and information, but increasingly also shopping. Among the smartphone owners in our sample, 25% reported using the phone for shopping related purposes daily (while for tablet owners this was 10%). Similarly, a majority believed that in five years time they would do most of their payments through their phones.

ENGAGE ME, THANKS!

As digital payment gets easier, and logistic infrastructures continue to improve, for today’s youth generation the most natural way of engaging with brands and companies will increasingly be through online interaction. Already, more than 50% of smartphone owning respondents in our survey reported being regular online shoppers. They named clothes, accessories, books, music, food and electronics as the products most frequently purchased. Perhaps even more interesting, 20% of the global young claimed to have contacted a company or organization in the last 12 months to suggest improvements to their products. Meanwhile, 75% believed that companies ought to be better at obtaining customer feedback on their products – no doubt via online interaction.

“What is my smart phone to me? It’s my game player, my phone, my Internet, my e-mailer, my music player, my workout tracker, and much much more. It belongs almost always in my hands.”

25-year old girl from New York



HONESTY REWARDED

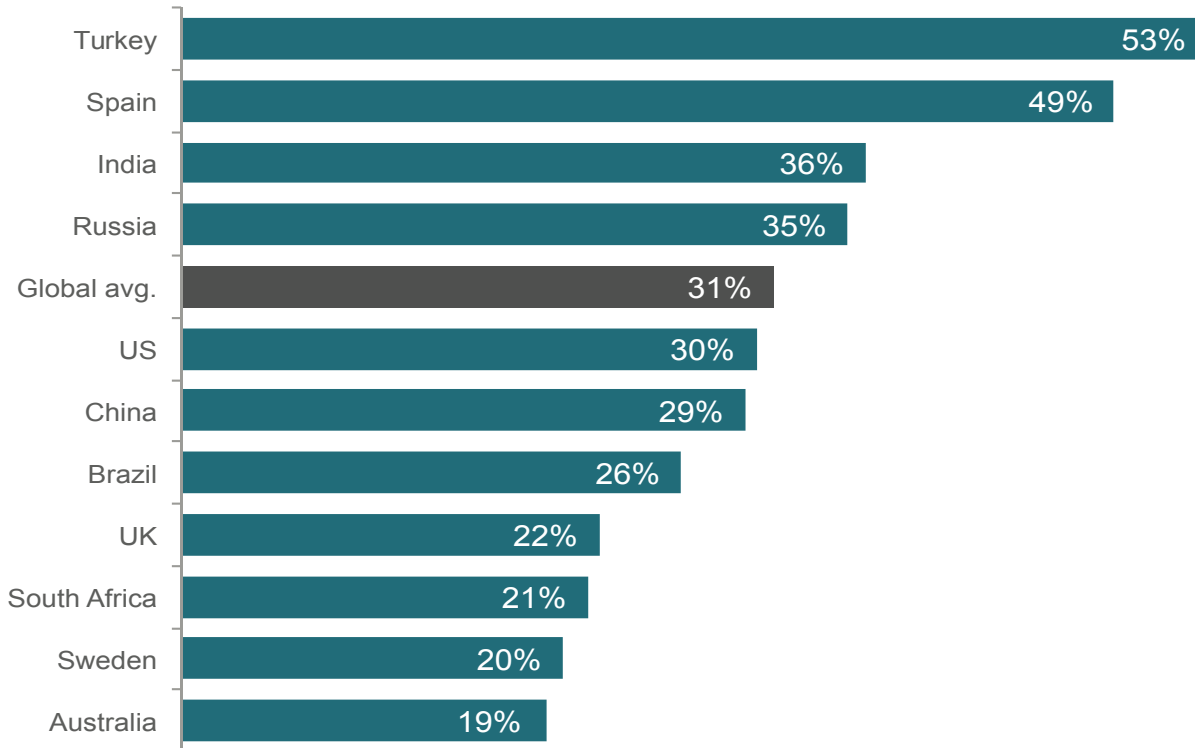
Before the advent of social media, brand management was still very much about centrally orchestrated one-way mass communication. Today this is no longer the case. With applications such as Pinterest, Facebook, Weibo and Instagram, consumers – in a 24/7 online discussion – are increasingly determining the essence of brands in real-time. In such demanding environments, only honest brand propositions have a chance of surviving. For those that do, the rewards are greater than ever. Among the global young surveyed, more than four in ten agree that certain brands are important for expressing their identity, and half believe that a product's brand is often more important than its price. Compared to the 2006/2007 survey, 20% more youth in Spain now believe that certain brands are important for expressing their identity, whereas in China the number has decreased by 14%. The Global Youth have thrown down the gauntlet, and brands will have to rise to the challenge.

69%

is the share of Turkish girls who agree that the right brand is more important than the right price. In Sweden only 25 % of girls say the same.



Share of smartphone owners reporting using it for shopping-related purposes on a daily basis



TAILOR AWAY

To be effective, an advertisement needs to meet at least two criteria: it must reach the target audience, and it must speak and be relevant to their needs. Recent technological developments hold bearing on both of these areas. Firstly, with the explosion of smartphones, more and more eyes are now glued to a 4" screen, rather than, say, the TV, which explains why mobile marketing is the next frontier for marketers. Secondly, developments in data analysis have made tailored advertisement economically viable.

Although a majority of the Global Youth would like their mobile to be an ad-free zone, one third is in fact positive about mobile ads. And, in even better news for marketers, half of the young say they would prefer to see advertisements tailored specifically to them.



So what does it mean?

It is, of course, impossible to make specific recommendations or a single summary of the challenges at hand from a study as diverse as the Global Youth study – one that has covered 5 continents, 11 countries, 250 questions and a variety of topics.

However, if we were to summarize the recommendations in one, that single recommendation would be: Question your assumptions, and hunt for the unknown unknowns. What we mean is that in order to fully understand tomorrow's adults we need to question everything we know about young people. Because, if we don't, the brain will fill in the gaps and interpret information according to what it already knows. And what we know is not necessarily right.

Today's youth do not value and desire what 40 or 50 year-olds, and maybe not even what 30 year-olds, once did. For instance, in China, our qualitative research indicates a chasm in attitudes between the 20 year-olds and their ten years older siblings and cousins. Neither do today's youth necessarily aspire to what your own kids and their friends do. Thus,

reaching conclusions from individual experience is never recommended.

So, be curious, study the data closely, use new methods like big data ethnography, and let the technology identify the unknown unknowns, so that you do not jump to conclusions too quickly.

Finally, think thoroughly about the consequences and develop your own set of relevant questions from the results presented in this and other reports. Examples of such are:

- What are the potential risks of growing political mistrust and despair in many nations, and are you hedging for that risk?
- What does it really mean that young people have problems concentrating, and that this lack of concentration seems to be linked to heavy social media usage?
- What consequences should we draw from the fact that more than one in three young people believe it's too late to stop global warming?



- What does it mean, as an employer or from a communicational point of view, that young people want to become adults, rather than staying forever young?
- What does it mean to, for instance, CSR that young people are further left than right in their political views, and that corruption is a top-threat in many countries? Or that the youth think capitalists get too much of the share and workers too little?
- What does it mean to you that ‘good working conditions’ include the ability to leave work when you leave the workplace, or that maternal and paternal leave is one of the top expectations?
- How are you managing the consequences of a global workforce, where the most ambitious youth no longer come from the west, but rather from newly developed economies such as China and India?
- How do you respond to the fact that young people expect to be more engaged in, for example, product and service development?
- What does the mobility trend really mean?

Good luck! The ball is rolling!



About The Survey

In May 2013, an online survey was distributed to 500 respondents, aged 16-29, in eleven countries, for a total of 6500 respondents (with 1000 respondents in Sweden and China). Countries surveyed were: Australia, Brazil, China, India, Russia, South Africa, Spain, Sweden, Turkey, UK and the US.

The samples were drawn from web-based panels purchased from and administered by CINT (www.cint.com). The results have been weighted to ensure better representativeness with regards to sex and age groups. Indian, and South African respondents completed the survey in English, in the remaining countries respondents completed the survey in their native language.

It should be noted that online panels are not necessarily fully representative of a country's population at large as, for instance, Internet usage/penetration tends to differ between socio-economic groups. This is especially the case for countries where the overall level of Internet penetration

is comparatively low, such as for instance in India, China and Brazil. To stay on the safe side, generalizations of results in these countries should be confined to its Internet-using citizens, or in this case, what we call the Global Youth Generation.

Furthermore, it should be mentioned that in multi-lingual surveys such as this, international comparisons of results should always be made responsibly, as there is always the possibility of differences arising partially out of translational and cultural nuances.

The purpose of this report is to provide a set of selected results. The survey contained over 250 questions covering 4 broad areas. If you are interested in more in-depth analysis, international comparisons or discussions on conclusions, please contact us for a special report, presentation or workshop.

About Kairos Future

Kairos Future is an international research and consulting firm that helps companies understand and shape their futures. With a unique holistic approach to futures analysis, strategy and change, we are a leading organization in our niche in Europe. Our head office is located in Stockholm and we have local offices and close collaboration with partners in about 15 markets.

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