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Realtime Generation Survey 2009

A Summation of all Fears

Executive Findings

Executive Summary

Over the past three years, Logicalis UK has surveyed a representative group of 13-17 year old UK citizens, polling their views on a range of issues, from their personal technology habits, their aspirations for technology in education, to their thoughts about their future work-life balance.

After our initial survey in 2007, and from analysis of the responses we received, we named this group the UK 'Realtime Generation'. In June 2009, we questioned ***1049*** 13-17 year olds from four primary UK regions; Northern England, Midlands, Southern England and South Wales.

Those historically most interested in the survey results have been the executive and IT leadership within UK further and higher education institutions. Since 2007, the general mood of the responses has been one of positivity, we have all, our children included, been living through boom times.

We focused on digital habits and the use of social technologies in social and education settings, to give those making significant investments in both education and business technologies a glimpse into how those investments could transpire into better education outcomes or a more productive workforce.

However this year, and in the light of the current economic gloom, we felt it incumbent on us to enquire if this generation's aspirations and plans for education and careers had changed direction. When asking a 15-year-old if social networking would be a useful tool to make friends when joining university we must take into account whether that person now feels they can afford to attend university at all.

We have asked specific questions about education, course and career decisions in light of the recession, and in an attempt to try to capture a consolidated view of the combined worries of this current crop of the Realtime Generation we asked a final open question. *"What are your main worries about your future?"*

You will not be surprised to hear that the recession has not escaped the attention of your average 13-17 year old. We were not expecting the impact the economic downturn was having on the immediate and future education and career plans of our children.

1049 individual responses created a very long list of concerns, and we have leveraged a technology of this generation to visually represent the worries of a generation.

The image on the front cover of this executive summary is a unique *tag cloud* displaying the most frequently used words from every response.

Is it surprising that 'jobs', 'money', 'afford', 'want', 'future' are the terms most readily used? Probably not, what surprised us most is that with only a few exceptions we have an entire generation of teenagers worrying about the same things as their parents.

Responses to our other questions reflect concerns over further and higher education ambitions and career choices. Which course to study, which career holds the best prospects, and which university to study at, are all under review due to this generation feeling the impact of the recession.

Only 20% of our teenagers have no concerns as to the recession's impact on their higher education decisions.

13-17 year olds in the north of England are least worried about the recession affecting their higher education choices and the least worried about taking on debt to fund their education. Not a single 13-17 year old in south Wales is 'very comfortable' about taking on debt to progress in further or higher education.

The recession will affect the choices of our children and the lives of their parents, who can now expect their offspring to be staying at home longer and choosing a college or University within commuting distance.

Vice Chancellors hoping to increase fees, or whose prospective student base is outside of the local area beware. The economic downturn is forcing your future student consumer to make tough decisions about taking on debt, funding an education in the first place, or choosing a place of study within commuting distance of their home. You may well find it tough in the coming years.

The survey positively highlights that we can expect a solid number of science, IT and engineering graduates, and it appears the vast majority of these are likely to be boys, with 37% stating they will study one of these courses, compared with only 17% of girls.

Girls preferred an artistic course choice (25%), and whilst the majority of both boys and girls stated future income (35% and 28%) as the number one reasons for course selection, enjoyment was a close second reason for girls (25%) compared with employability for boys (26%).

All agreed however that the degree course with best future job prospects were science, IT and engineering, so maybe teenagers do all dream of being footballers and pop stars, but our survey indicates that the countries economic downturn may result in an upsurge in our children wanting to become doctors, academics, engineers, inventors and innovators.

What is most evident from our survey is that the mindset of our children today is fixated, like the rest of us, on the economy.

The picture this survey paints is not one that our country overall should be proud of. We have 13 year olds worrying about taking on debt in return for education and their ability to provide for their prospective families.

However, it should be a crumb of comfort that we may now have a generation who believe attainment of a financially rewarding career is achieved through inventing and making things.

It is worth noting that through all this doom and gloom, the Realtime Generation are still just that, using social networking more, collaborating on their homework more, and using the Internet as a resource to complete course work or homework.

If it means *cheating* to get ahead, then Realtime girls are more willing and more open to admit to bending the rules. While girls are more willing to admit to cheating, the boys are more forthright in their protestations that they would never stoop to using the Internet to lift work and submit it as their own.

We are unsure whether to feel horrified or quite proud of the girls, but schools, colleges and universities must grasp the collaborative nettle and exploit our children's ingenuity and collaborative skills.

Over half of the children surveyed now regularly collaborate to complete homework, relying on their network of friends outside of the classroom. With a near 50 / 50 split between those that do and do not collaborate regularly, our education system must grasp the collaborative nettle.

Are some children more able to collaborate or is it that others find it an unnecessary diversion from doing the work themselves?

Three quarters (78%) would like a more formal attitude towards collaboration in education, and we feel it is more likely that collaboration has not been embraced to the extent our children would like. Those who do not collaborate regularly, or not at all, must clearly have the urge to do so but lack the systems and support to make it happen for them.

What is apparent from the survey is that the IT experience of our children in current and further education continues to grow in importance.

The education system, education executives and the IT industry must continue to work together to ensure that appropriate technologies are available to students and academics. The economic downturn will challenge immediate and future investments, and ensuring investments deliver the maximum return is even more important in 2010 and 2011.

If students feel more comfortable using email from a consumer provider such as Google or Microsoft (46%) then adopting this model for the millions of student email accounts within further and higher education could meet the expectation of the student body while reducing the burden of cost on the institution.

Next year we hope to be able to return to our normal survey. Will the 37.5GB of personal storage each 13-17 year old had in 2008 have increased, and by how much? Has the 11% of 13 year olds who in 2007 said they would leave an employer who asked them to choose between their family and their work increased with the prospect of an upturn in the economy?

What we truly hope is that in 2010 we will see a tag cloud that does not reflect the economic crisis, and that our teenagers will feel more confident about money, paying for education, careers, and jobs.

Survey conducted online and the sample is 1049 responses, 715 female, 334 male.
Northern England 270, Midlands 415, Southern England 299, South Wales 50, ROUK 15

We would like to thank Wordle for producing and storing this tag cloud at
(http://www.wordle.net/show/wrdl/1075028/Logicalis_UK_Realtime_Generation_Survey_2009)

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What are your main worries about your future?
Individual quotes from the UK Realtime Generation

(All printed as submitted)

"I want to go to university, but I don't want to be in debt after I leave, especially in the countries economic state. I do not want to put the pressure on my mum or dad in this current crisis, to pay for the funds just for my future. So if it comes down to it, I would maybe take the risk, but I would most likely try and find a career with the GCSE's and A-level I would hopefully have got."
15-17 year old male, Midlands

"I am 16 and have been looking for a job for months now. I have had no luck whatsoever and am worried that this is going to carry on throughout my life, and because of this, I am going to find it hard to pay for university bills etc. I also do not want to depend on my parents my whole life, as I do not think its fair on them."
15-17 year old Female Midlands

"Not getting anywhere and letting my family down."
13-14 year old female, West Midlands

"Not being able to afford a better education for myself."
15-17 year old Male, Midlands

"*Everything if I'm being honest, because of recent times, you don't know what will happen in the future, but mostly, getting a job, because it is so difficult these days; hopefully the economy will have looked up by then, and will be back to a good standard."*
15-17 year old female, Northern England

"Being unable to go onto higher education due to the current recession. Being unable to afford to go to my chosen university and be forced to chose one which is nearer to home, this could also affect the course I am wanting to study, as this university may not be the best for that chosen subject."
15-17 year old female, Northern England

"That money will affect my higher education causing me to be in a dead end job."
13-14 year old female, Southern England

"At the moment my main worry would be the amount of money I will need to go off to university and living costs because of the recession."
15-17 year old male, Southern England

"That I will not be able to afford basic things like a house. Will have to move in with relatives and not be able to get a job. Come out of school with qualifications and miss out on the type of job wanted."
13-14 year old female, Midlands

And thankfully…"I am only 13 so I don't really have any."
13-14 year old female South Wales

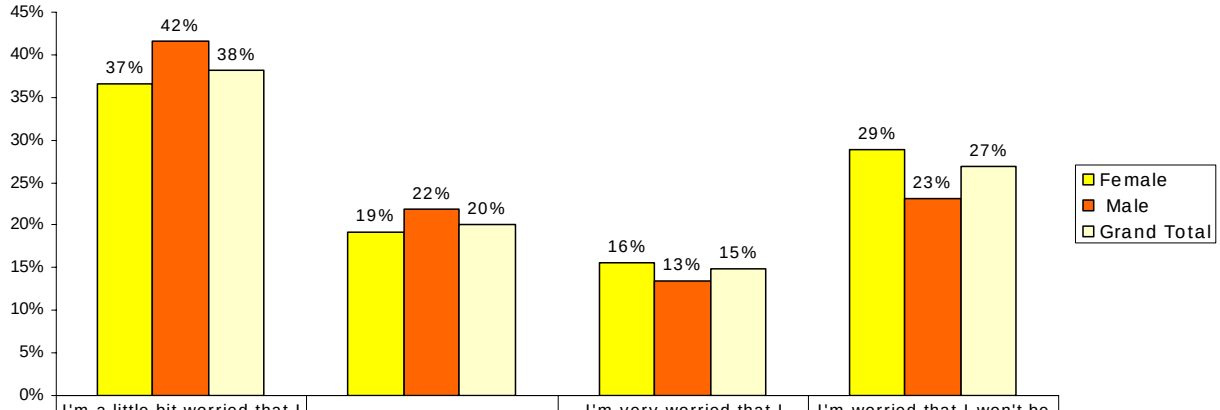
Only 20% of the UK Realtime Generation believe the recession will not affect their decision to move into further or higher education.

While the country manages the impact of the economic downturn, our 13-17 year olds are clearly just as worried as their parents about the impact it may have on their lives.

With 42% of the Realtime Generation worried or very worried that they will now not be able to afford to take the education steps they had previously planned, the UK government and education sector must convince this next generation that investing in higher education is worthwhile.

What must concern Government and Vice Chancellors alike is that with this major recession coming only a few years after the introduction of higher education charging, this may convince a student consumer that creating future debt for education now is not a viable personal option.

How do you think the ongoing recession will affect your decision to go onto Higher Education?



	I'm a little bit worried that I won't be able to afford it	I'm not at all worried	I'm very worried that I won't be able to afford it	I'm worried that I won't be able to afford it
Female	37%	19%	16%	29%
Male	42%	22%	13%	23%
Grand Total	38%	20%	15%	27%

13-17 year olds in Northern England are the least worried about recession affecting the affordability of higher education.

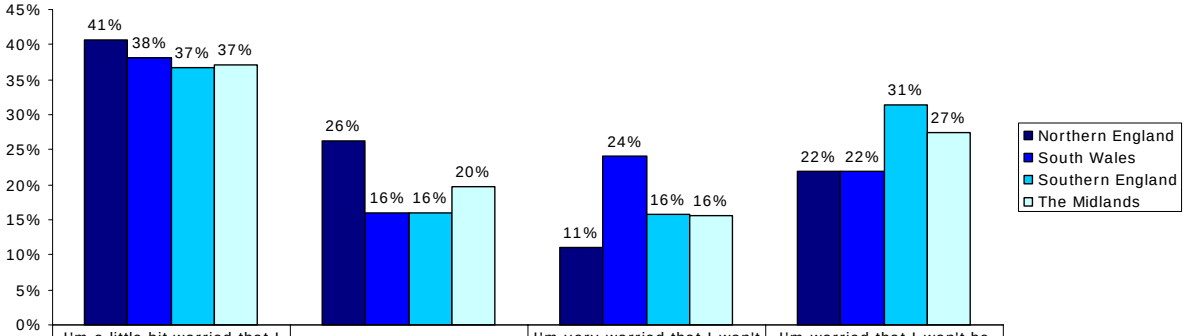
Girls and boys in South Wales are most worried about affording higher education.

The North of England has the least worried 13-17 year olds in the UK with 26% not worried at all, compared with only 16% of children in the South of England.

Of the 13-17 year olds very worried about affording higher education, children from Northern England are the most relaxed with only 11% very worried compared with 24% in South Wales and 16% in the Midlands and Southern England.

Whilst university places are in short supply this year education institutions, the government and employers should be concerned that we do not let 'fear of the recession' unduly affect the education aspirations of our children.

How do you think the ongoing recession will affect your decision to go onto Higher Education?



	I'm a little bit worried that I won't be able to afford it	I'm not at all worried	I'm very worried that I won't be able to afford it	I'm worried that I won't be able to afford it
Northern England	41%	26%	11%	22%
South Wales	38%	16%	24%	22%
Southern England	37%	16%	16%	31%
The Midlands	37%	20%	16%	27%

Give me education please, but not the debt! (48% are uncomfortable or very uncomfortable about taking on debt in return for higher education).

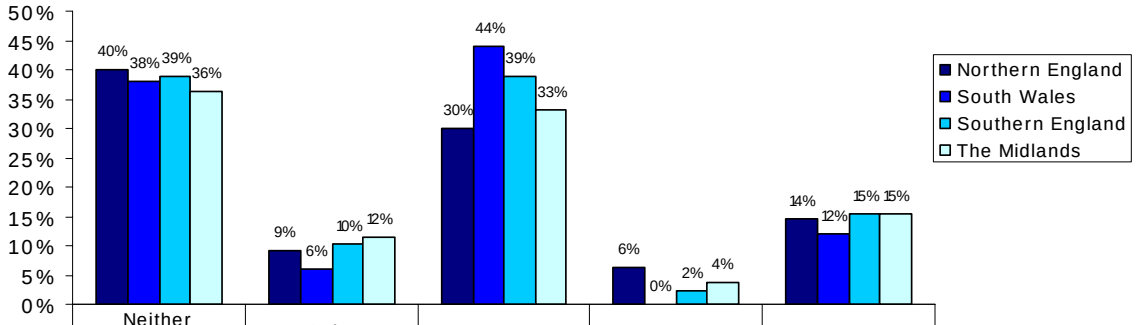
The recession has left nearly half (48%) of the UK's 13-17 year olds uncomfortable or very uncomfortable about going into debt to finance their future university education.

Only 4% feel very comfortable and 12% are quite comfortable about taking on the burden of debt for the benefit of a university education. There were no 13-17 year olds in South Wales who felt 'very comfortable' about taking on debt to fund university.

The recession is clearly going to cause problems for Vice Chancellors of universities hoping to increase fees in the coming years, and challenges for the Government in continuing its drive to encourage children into higher education.

Perhaps the UK's 13-17 year olds are over worried about debt, or perhaps like the rest of the country they have realised that living on credit, whether provided by the banks for a mortgage or by the Government for a place at university is no way to a certain and stable future.

Now that you've experienced a recession, how comfortable do you feel about going into debt to finance your university education?



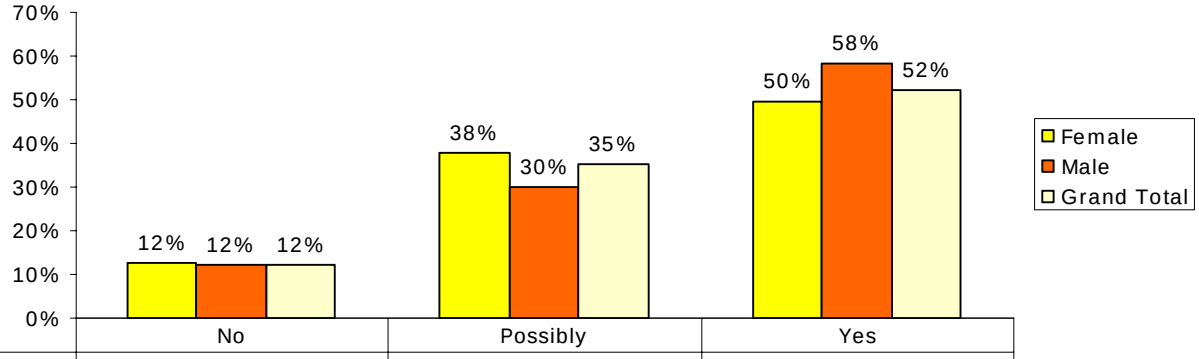
	Neither comfortable nor uncomfortable	Quite comfortable	Uncomfortable	Very comfortable	Very uncomfortable
Northern England	40%	9%	30%	6%	14%
South Wales	38%	6%	44%	0%	12%
Southern England	39%	10%	39%	2%	15%
The Midlands	36%	12%	33%	4%	15%

However, a free laptop or iPhone would be nice.

Unsurprisingly, the offer of a free laptop as an influencer in the choice of college or university has risen to 52% in 2009, from only 35% in 2008. Those who would not take account of free technology in their choice is down from 20% in 2008 to only 12% in 2009.

The recession and tightening of belts at home is clearly a factor in this change, and while it would be clearly advantageous for Vice Chancellors to be able to offer this incentive, the money to fund it may simply not be there.

Would the offer of a free laptop or iPhone (or similar) entice you to join a particular University or College?



	No	Possibly	Yes
Female	12%	38%	50%
Male	12%	30%	58%
Grand Total	12%	35%	52%

I am sorry Mum and Dad. The recession means I am off to university but I am staying at home.

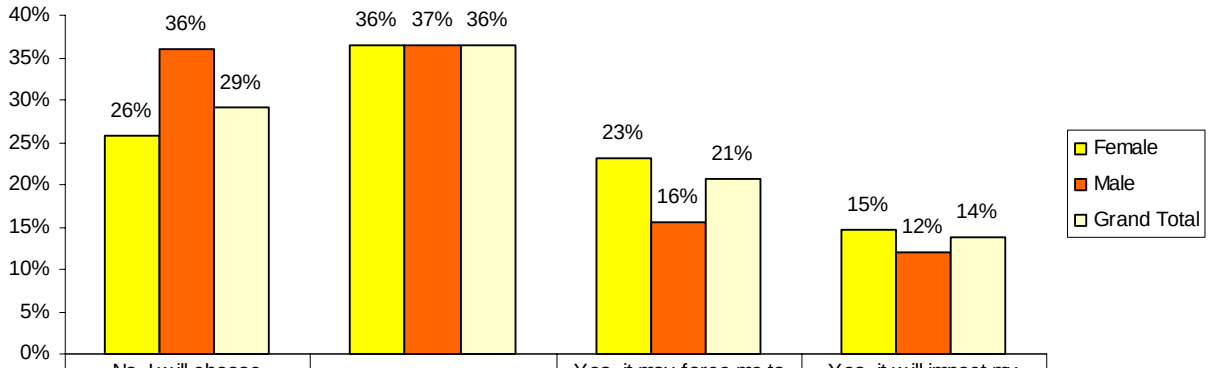
Only 29% of the UK's 13-17 year olds now feel that they can make their choice of university regardless of the cost of attending and living.

52% believe they will now have to take into account the cost of living when deciding which course and which university they will study at. The 13% who believe recession will affect their choice of course could now be making a decision based on which course gives them better employment chances, or, just that the course they wish to study is at a university now too expensive to study at or live near.

Parents will enjoy the company of their children for much longer than they expected, with 21% now thinking of studying closer to home, or living at home to cut costs.

What must concern universities across the UK is that their proximity to major towns or cities will define the pool of potential students they can attract. For those universities hoping to hike up student fees the recession looks like it will affect their business plans from 2010 onwards.

Do you think the ongoing recession will impact your choice of University or College?



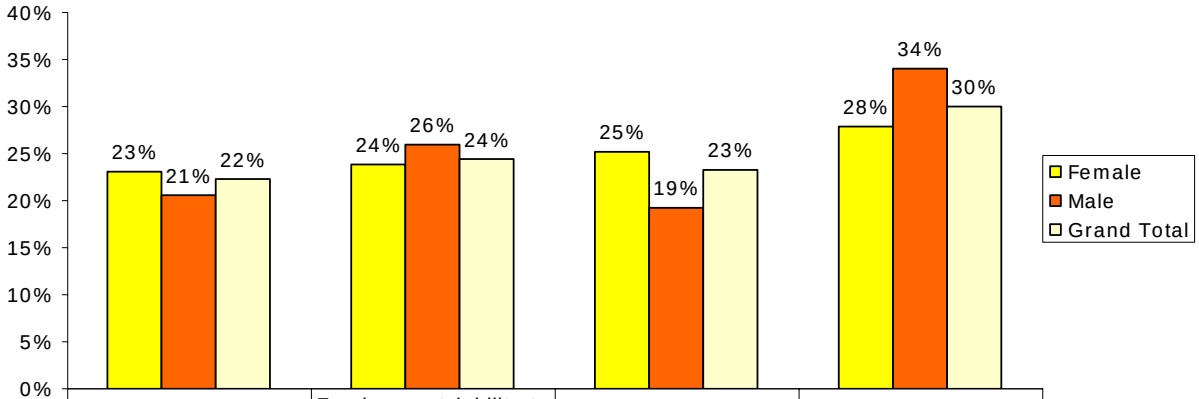
	No, I will choose University that is best for me regardless of cost	Yes, I will have to take into account cost of living	Yes, it may force me to stay at home or study nearer home	Yes, it will impact my course choice and so University
Female	26%	36%	23%	15%
Male	36%	37%	16%	12%
Grand Total	29%	36%	21%	14%

Money, money, money is the higher education winner.

Money is the driving force when it comes to choosing university courses, with 30% of teenagers citing the ability to make money as the most important reason for choosing a degree course.

A higher percentage of boys than girls chose 'money' as the most important reason for choosing a degree course. For girls, 'money' (28%) was top, but closely followed by 'enjoyment' (25%). In contrast, the category of 'enjoyment' was the least important for boys.

What is the most important reason for choosing your degree course?

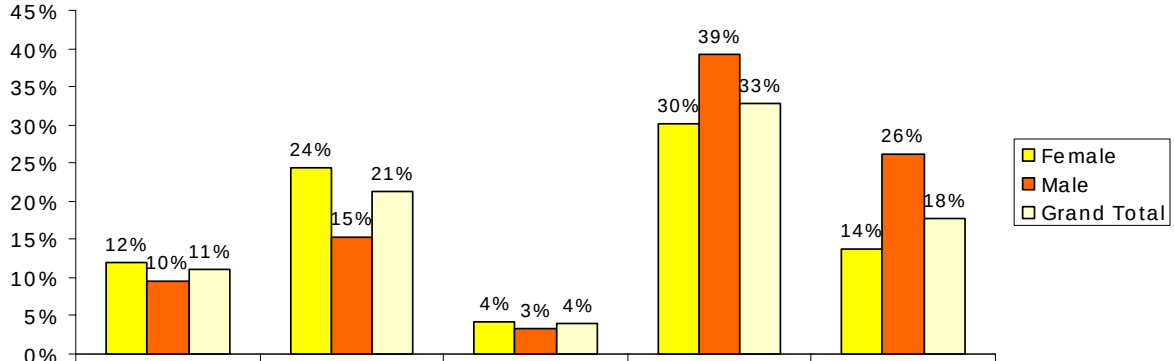


	Career Prospects	Employment (ability to get a job)	Enjoyment	Money
Female	23%	24%	25%	28%
Male	21%	26%	19%	34%
Grand Total	22%	24%	23%	30%

Our country has a future brimming with scientists, IT specialists and engineers, but not many bankers, and the choice of course is academic.

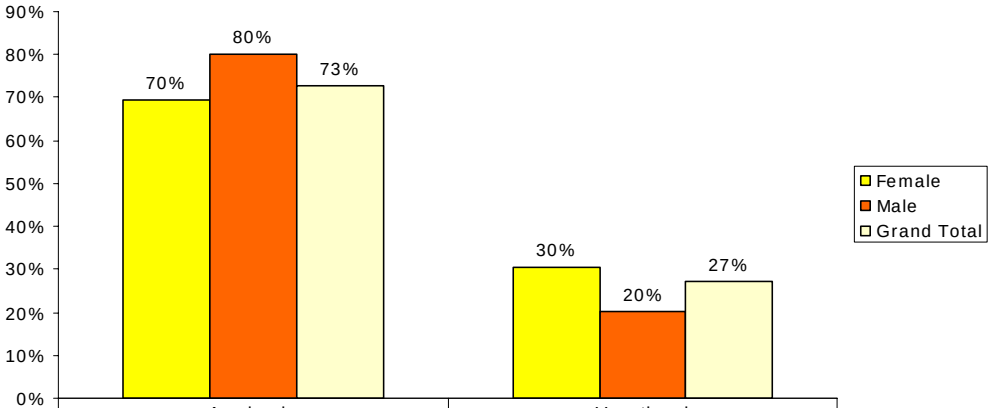
Who can blame the Realtime Generation for thinking that banking or property does not figure highly as a career of choice? However, the UK should be encouraged that our 13-17 year olds are planning to work in the sciences, IT and engineering fields, or at least that's where they believe the jobs or money lie. While girls believe sciences (30%) or media (24%) provides the best career prospects, boys agree on science (39%) but think that skilled trades (26%) offer best employment chances. This is not a bad thing for an economy looking to rebuild itself by improving the balance of payments and increasing exports. The current recession will be over by the time this generation hits the workforce, but one positive thing that may come out of it is the re-focussing of our children on professions and course choices that will support an economy based on building things, and not simply buying and selling them.

Which profession do you consider to have the best career prospects?



	Banking	Media	Property	Sciences/IT/Engineering	Trade (i.e.Plumbing/Electrician)
Female	12%	24%	4%	30%	14%
Male	10%	15%	3%	39%	26%
Grand Total	11%	21%	4%	33%	18%

What type of course do you intend to pursue at University or College?

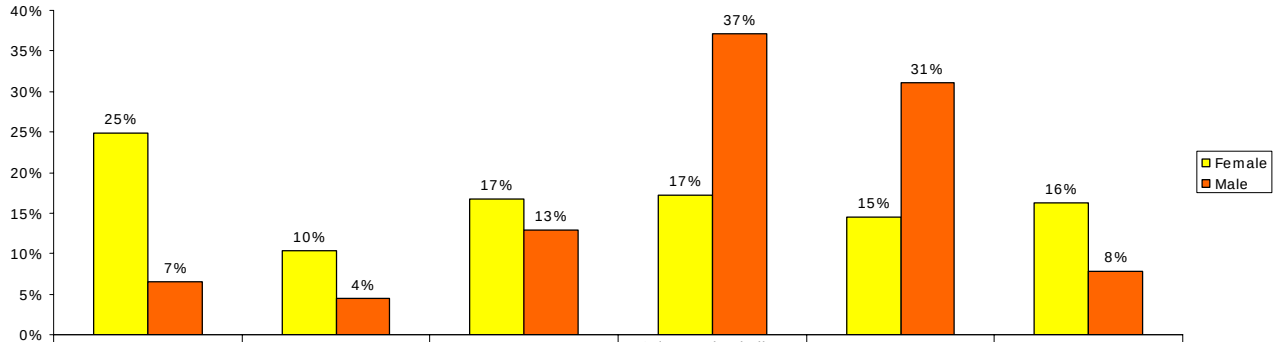


	Academic	Vocational
Female	70%	30%
Male	80%	20%
Grand Total	73%	27%

Budding scientists will pack our universities. Well, boy scientists at least.

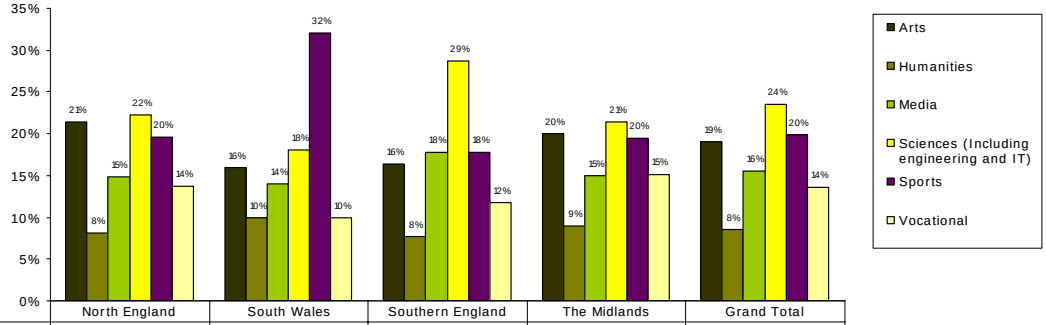
Assuming the Realtime Generation decide they can afford to attend university, their view that science/IT and engineering is the career to have is backed by at least the boys intention to study suitable courses. While girls believe the career of choice is science/engineering and IT, only 17% percent of them intend to study these courses at university, the preferred option for 25% being the arts. And when we look at which part of the country our budding scientists are likely to come from, Southern England tops the poll with 29%. In South Wales sports is by far the most popular degree course and it looks like producing the fewest scientists, IT specialists and engineers.

What course do you intend to study in higher education?



	Arts	Humanities	Media	Sciences (Including engineering and IT)	Sports	Vocational
Female	25%	10%	17%	17%	15%	16%
Male	7%	4%	13%	37%	31%	8%

Which course do you intend to study in higher education?



	North England	South Wales	Southern England	The Midlands	Grand Total
Arts	21%	16%	16%	20%	19%
Humanities	8%	10%	8%	9%	8%
Media	15%	14%	18%	15%	16%
Sciences (Including engineering and IT)	22%	18%	29%	21%	24%
Sports	20%	32%	18%	20%	20%
Vocational	14%	10%	12%	15%	14%

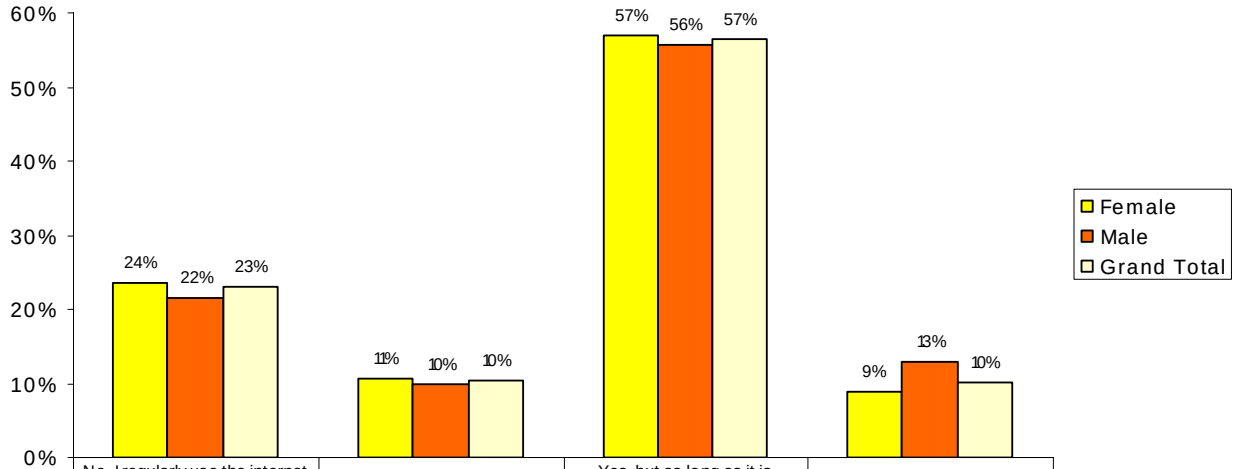
Was the Internet 'made' for cheating? For girls it seems it probably was!

Realtime Generation girls are using the Internet for completing school course work ahead of boys across all questions asked. Girls are more open about using the Internet to *'cheat'* with 35% saying they regularly use it to complete homework as apposed to 32% of boys. 11% of girls and 10% of boys admit that they believe the Internet 'was made' for cheating. However, a third more boys than girls believe the use of the Internet for completing course work is cheating and state they never use it.

Recent exam results have indicated that boys do better, when exams marks take precedence over course work, and perhaps girls' willingness to bend the ethical rules over using the Internet for course work may demonstrate why they have done so well in recent years.

Over half of all boys and girls now believe that using information from the Internet to complete assignments is perfectly acceptable as long as they reference material correctly.

Do you think using whole piece(s) of information from the Internet in your own work is cheating?



	No, I regularly use the internet to help fill out a piece of course work	No, that's what the internet is for	Yes, but as long as it is referenced properly then it is fine	Yes, I never use information from the internet in my work
Female	24%	11%	57%	9%
Male	22%	10%	56%	13%
Grand Total	23%	10%	57%	10%

Was that all your own work, yes, probably!

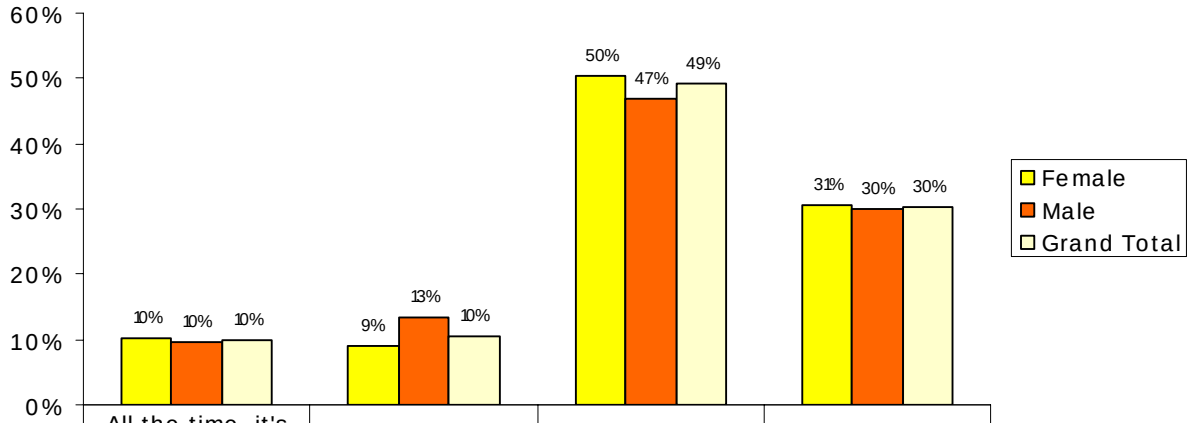
In our first report 3 years ago, we thought that to become a knowledge economy our 13-17 year olds needed to become collaborative thinkers and workers – the 2009 survey suggests that around 60% of boys and girls in the UK now collaborate to complete homework assignments.

Is this a surprise? We hope not.

As with their perception of 'cheating' by using the Internet to complete assignments, girls are slightly ahead of boys in collaborating. Girls clearly show a slightly higher propensity to get others (others publishing on the Internet or others within their social circle) to help them to complete their work. Are girls slightly more 'savvy' than boys in how they work to get things done?

Clearly collaborating to complete work and maybe compete in a results-driven education system is now the norm for over half our children. In a business world now driven by a collaborative ethic, perhaps we should be more concerned about the 30% who collaborative very little or the 10% who never collaborate to understand why they do not feel the need or are not able to work with others collaboratively in an education setting.

How often do you collaborate with your friends to complete homework?



	All the time, it's the normal way I work	Never	Some of the time	Very little
Female	10%	9%	50%	31%
Male	10%	13%	47%	30%
Grand Total	10%	10%	49%	30%

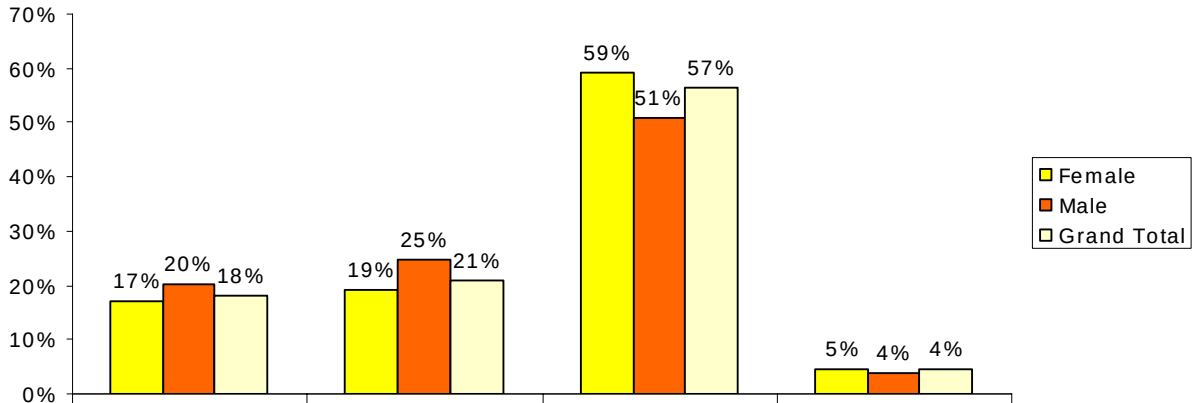
But could we collaborate more formally please?

78% of the Realtime Generation would like, or believe it extremely important to have, access to more formal collaboration systems in formal learning environments – connecting them to fellow students and lecturers.

It is clear and compelling that the UK education system and educators must now proactively support collaborative learning and course work. Formal collaboration systems are now widely available from the worlds leading technology providers (Cisco, IBM and Microsoft) founded on the social tools that 13-17 year olds are using at home.

Our children have a natural propensity to collaborate, and this will be a vital skill when this generation enter the workforce where these tools are becoming widespread. Schools, colleges and universities must adapt to this collaborative style of learning or risk losing the value this skill could bring to educational outcomes.

Would you like to have access to a system where you could collaborate online with fellow students and lecturers on course work and projects?



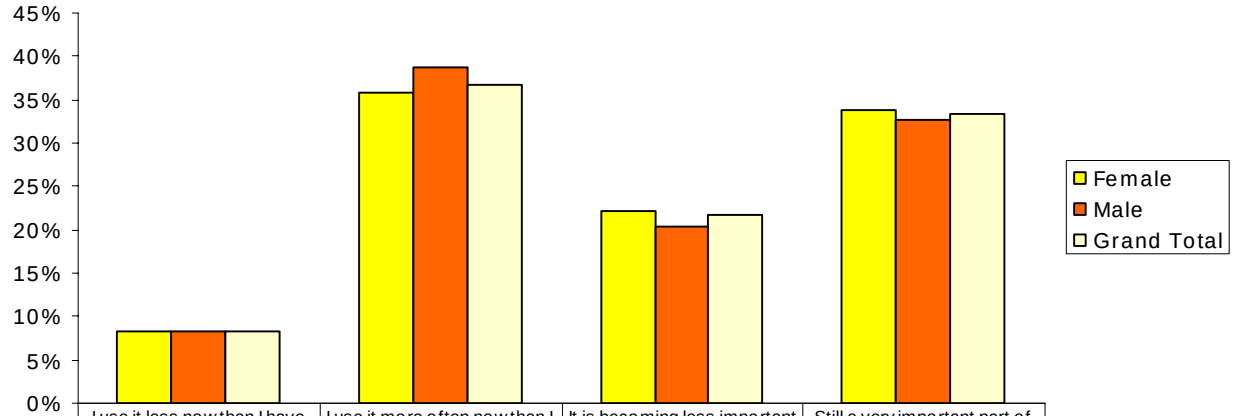
	Neither like or dislike	This is extremely important and I would like this	Would like this	Would not like this
Female	17%	19%	59%	5%
Male	20%	25%	51%	4%
Grand Total	18%	21%	57%	4%

Social networking is still working for the Realtime Generation.

(Facebook reverses last years result by trouncing the competition with 65% choosing it as their favourite site.)

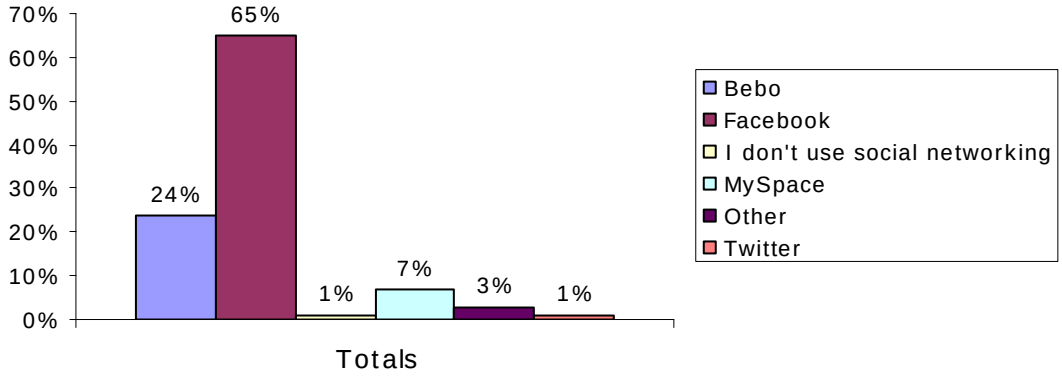
Social network is not on the wane for the Realtime Generation. While 30% said that social networking was used less or was less important overall in their lives this is down from 46% in 2008. When asked which was their social networking site of choice 65% chose Facebook, with Bebo its nearest rival at just 23%. Last year when we asked which social networking site this generation would like to see at university, Bebo polled 45%, the clear winner, so while the question has changed ever so slightly the preference from Bebo to Facebook seems to have switched massively in just 12 months.

How do you now view Social Networking?



	I use it less now than I have ever done	I use it more often now than I have ever done	It is becoming less important to me as time goes on	Still a very important part of my personal and social life
Female	8%	36%	22%	34%
Male	8%	39%	20%	33%
Grand Total	8%	37%	22%	33%

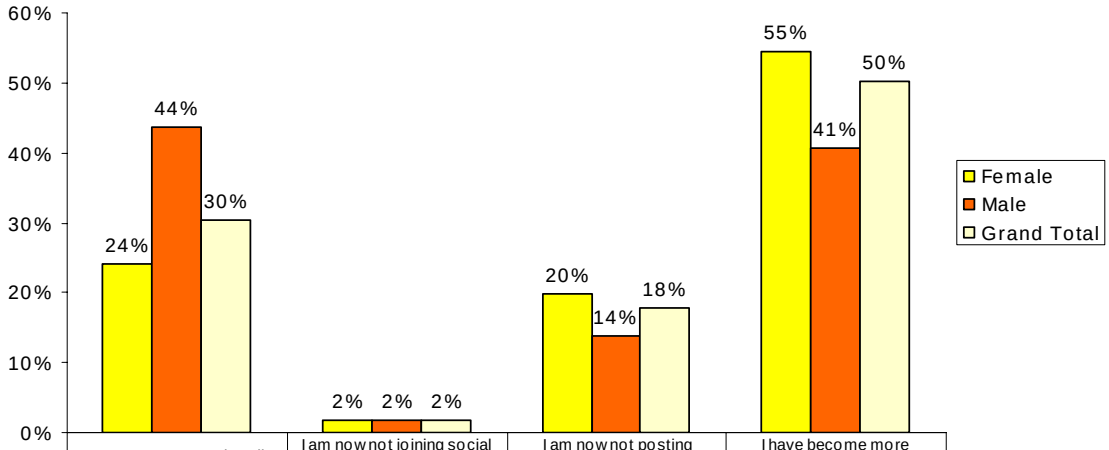
Which social networking site do you prefer to use?



Realtime Generation unwilling to give up social networking, more aware of the security dangers and still using everyday.

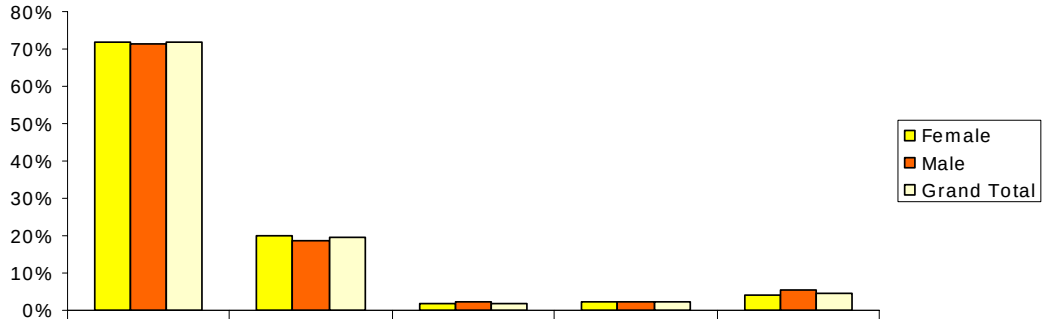
In 2009, the fear of personal information security is driving only 2% of the Realtime Generation to take a proactive decision in not joining social networking sites compared with 24% in 2008. This unwillingness to divorce their lives from social networking is tempered by an increase in awareness and concern about posting their personal information online. Some 55% of girls are now more concerned about posting personal information on social networking sites compared with only 41% of boys. 20% of girls are not posting any personal information on social networking sites compared with just 14% of boys. 72% of our 13-17 year olds now access social networking sites everyday of the week.

Are you concerned about your security and safety in posting your personal details on social networking sites?



	I am not concerned at all	I am now not joining social networking sites	I am now not posting personal information	I have become more concerned
Female	24%	2%	20%	55%
Male	44%	2%	14%	41%
Grand Total	30%	2%	18%	50%

How often do you access a social networking site?

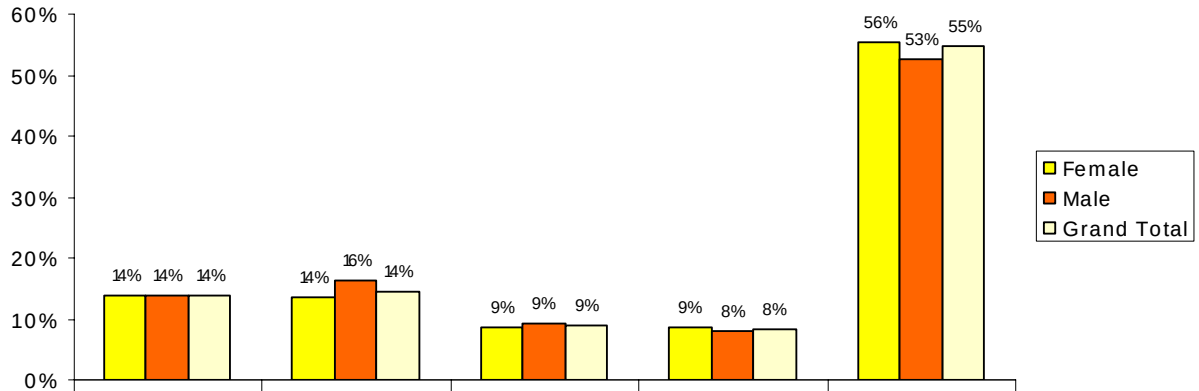


	At least once a day	Every few days	Monthly	Rarely	Weekly
Female	72%	20%	2%	2%	4%
Male	71%	19%	2%	2%	5%
Grand Total	72%	20%	2%	2%	4%

Universities can exploit the social side of social networking

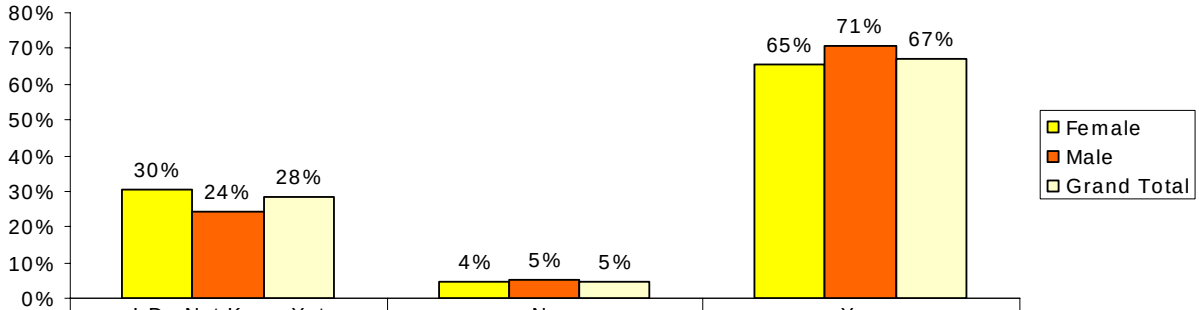
Student drop out rates continue to be a significant problem for Vice Chancellors. Use of social networking technologies to enable prospective students to become familiar with a university and for enabling existing students to feel part of the university community or sub-groups of communities could reduce drop out rates significantly. Nearly half of 13-17 year olds are willing to become a member of a university between one month and one year before physically attending, and 67% state they would use social networking sites while at university to make friends. Social networking could enable a new student to become part of the university family in a new and quicker way.

How long before joining a University would you access its social networking site?



	1 Month	3 Month	6 Months	1 Year+	Do Not Know Yet
Female	14%	14%	9%	9%	56%
Male	14%	16%	9%	8%	53%
Grand Total	14%	14%	9%	8%	55%

Would you use a University social networking site to make friends, join clubs?



	I Do Not Know Yet	No	Yes
Female	30%	4%	65%
Male	24%	5%	71%
Grand Total	28%	5%	67%

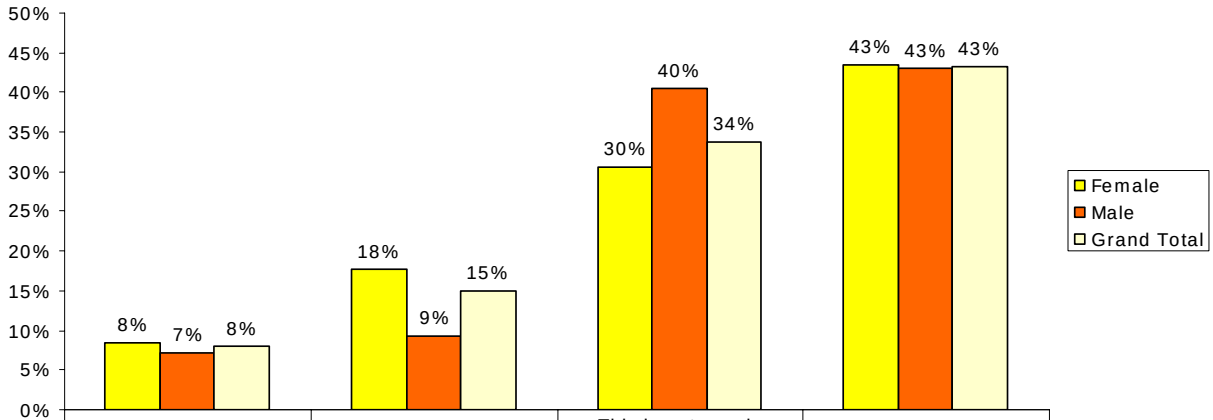
The potential of the information portal.

Has the power of the information portal truly come of age? Logging into different systems with different passwords is something this generation is not going to tolerate. With 77% of the Realtime Generation wanting all of their personal information at university available through a single system with a single login, this result should indicate to any organisation that stores more than one piece of information about an individual that simple access is now king.

Local Government and health sectors in the UK should benefit from this generations willingness and desire to use information portals to interact with all of their digital lives.

This generation will applaud investment in e-government services, as they want the complexity of accessing their personal government information footprint hidden and handled by those holding their data.

When at University you need access to many pieces of information (timetable, course submissions, student records, payment systems) – would you like to access to all the information you need through a single login to a single system?



	Do not care	Have not thought about it	This is extremely important and I would like this	Would like this
Female	8%	18%	30%	43%
Male	7%	9%	40%	43%
Grand Total	8%	15%	34%	43%

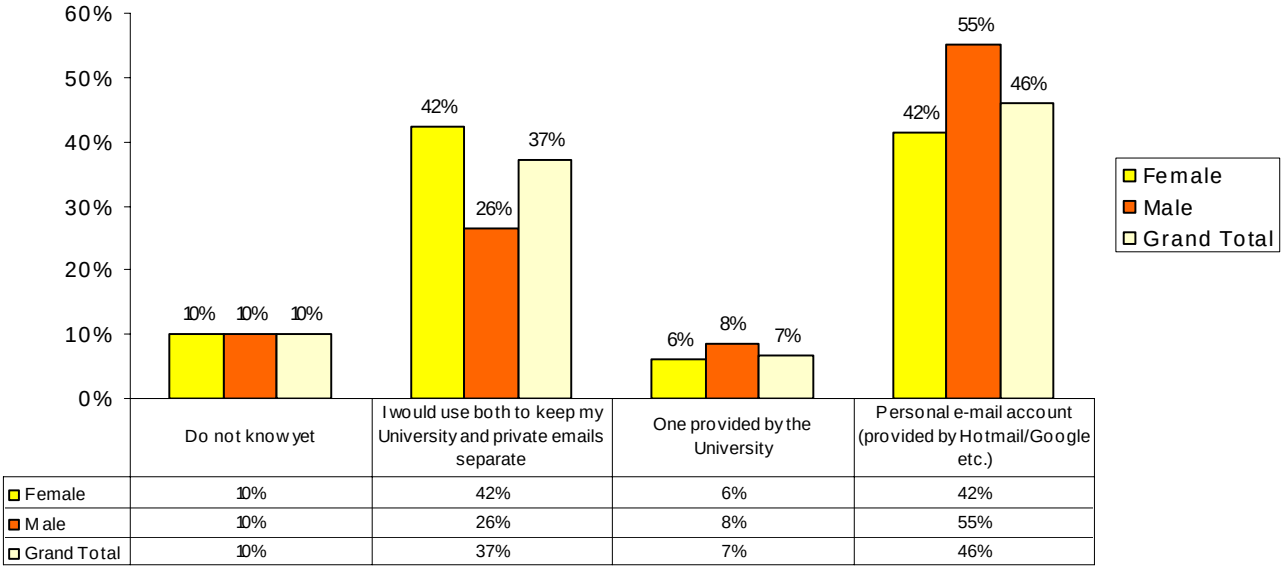
When at university what kind of email account would you prefer? Clearly not yours!

Many universities have already embraced the concept of using email as a service for their student bodies, and it seems that those who have chosen to bring in email from the Internet may have made the right choice for their prospective intake and their own budgets.

46% of a Vice Chancellor's future student consumers are happy to consume email services provided by Microsoft or Google, with only 7% wanting an enterprise-class email service.

This could be good news for a university looking to reduce its investment in internal infrastructure and shifting a considerable cost to a pay-per-seat operating model.

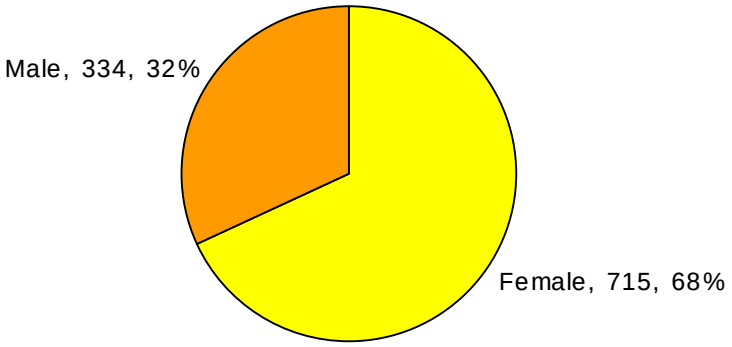
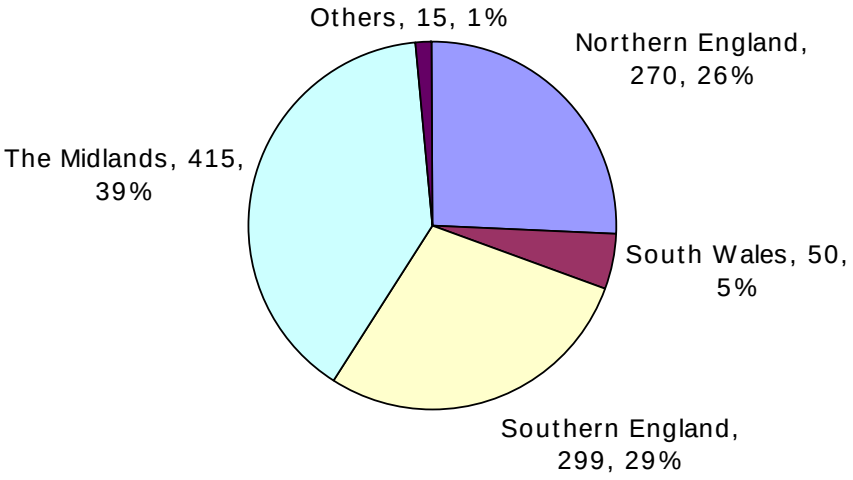
When at University what kind of email account would you prefer?



	Do not know yet	I would use both to keep my University and private emails separate	One provided by the University	Personal e-mail account (provided by Hotmail/Google etc.)
Female	10%	42%	6%	42%
Male	10%	26%	8%	55%
Grand Total	10%	37%	7%	46%

Survey Demographics

Male / Female Segmentation



UK Regional Demographic