

# Realtime Generation Survey 2008

How UK 13-17 year olds are coping in a digital, dangerous and dynamic world

Copyright Logicalis 2008

## **Executive Summary**

When Logicalis conducted the first Realtime Generation Survey in the summer of 2007 (Unlocking the potential of Britain's 13-17 year olds in the Global Knowledge Economy) our expectations of receiving insightful data on the digital personalities of the UK's 13-17 year olds was not high. Would a 13 year old really be considering future work life balance or their prospects for becoming a global knowledge worker?

Our focus then was to investigate if the UK's irreversible transition to a knowledge economy was supported by a generation that could embrace and leverage emerging technologies and ways of working that put 'how you work with what you know' as a key economic differentiator.

We firmly believed that a typical 13-17 year old in the United Kingdom was prepared or preparing themselves for a world where competing with a knowledge worker in China or India would be more important than one in Chester or Ipswich.

In our 2007 report we suggested that an economically successful Britain must compete in a new world where education standards are rising quickly in the developing world, where the growth in communications and technology can move jobs from one continent to another at will, and where an economy built on 'services' is simply built on its people, their skills and capabilities.

Our first report was published in the summer of 2007, a time that will forever be known as BCC (Before Credit Crunch) and while the world may now be (or seem to be) teetering on the brink of financial collapse, the requirement to continue to see a United Kingdom economy based on every individual's personal knowledge and their ability to leverage that knowledge has not diminished; it may have simply become ever more important.

Twelve months will seem like twelve years to many, but, irrespective of economic upturns and downturns, the nature of the challenge to our country has not changed, and will not change now or in the foreseeable future.

Further and higher education institutions proved a willing audience for the 2007 survey results; after all, they would be the first to have to provide the tools and environment that this generation would have to engage with. It was also the audience with least time to prepare for attracting the new 'student consumer'. The Realtime Generation research was well received within this sector and complimented similar research aiming to provide direction from the Vice Chancellor to the Director of IT Services.

Whom the education sector works with today, the private sector competes for tomorrow, and understanding the relatively imminent requirements of the Realtime Generation in education provides longer term guidance of the massive investments needed within the wider UK economy.

If the technology experience dreamed of by the next generation of knowledge workers is to shape the design and delivery of tomorrow's learning and working environments and the IT systems provided within them, it's imperative that we start preparing today. And for those responsible for the IT systems and services that reside in our colleges and universities, that imperative is even more pressing.

However, our main aim for the 2008 survey was not to simply ask 13-17 year olds what technology or technology experience they wanted, but, how they were coping with what they already had, and how were they evolving their lives to cope with the ever growing opportunity to engage with and through work and social communications and information tools; how were they coping in a new digital, dangerous and dynamic world.

Are these children really as naïve as we think they are; posting every piece of personal information they have on social network sites? Do they really not see the dangers to themselves or their future careers of providing a running commentary on their own lives?

Are these children really only interested in communicating through text or instant messaging, and has the explosion in Internet conversations killed their ability to engage in interpersonal ones?

Are these children isolated from the wider world, unaware of the financial turmoil around them, unconcerned about how they will fund their own education and unwilling to think about the long term consequences of the credit crunch on their prospective career opportunities?

And, are these children all budding Einstein's, planning to power the UK economy in science and technology R&D, or are they more interested in the power of the media, and creating the next big reality TV show?

'The Realtime Generation Results 2008; How UK 13-17 year olds are coping in a digital, dangerous and dynamic world' once again surprised and encourages us.

First of all, let's hear it for the UK's 13-17 year olds. They are far savvier than they're given credit for by many of the older generation (and most of the UK media). And they are far more aware of the risks of social networking than we seem to think.

78% of the UK's 13-17 year olds now do not post personal information on social networking sites, are more concerned about their security or have stopped using those sites altogether.

Whether that's down to better parental control, the effect of media scare stories or just a growing understanding of the risks of social networking, they are now actively managing their own digital fingerprints. Perhaps the social networking explosion is starting to wane anyway? Forty-six per cent say that social networking is less important or used less than in the past. It's still good to talk and see and speak.

When asked about their preferred method of communication with prospective universities, face-to-face came out top with 29 per cent preferring to look into the eyes of their future educators; encouragingly face-to-face won out over Facebook. Email, followed by SMS, came in at second and third places; but, as you might expect of this generation, every possible form of communication came out in the mix, with many even mentioning good old Royal Mail.

All future employers must now start to prepare for this multi-channel generation if they want to engage them fully, but while technology rains in around us, they must not forget the old adage, that people still work with, learn from, and buy off people.

In 2007, many were surprised that nearly 80% of this generation were considering their work life balance, even at 13 years old (and it is still 80% in 2008 so no change to future work life flexibility expectations), so, what should surprise no one is that the credit crunch has not passed by unnoticed by the Realtime Generation.

43% of the UK's 13-17 year olds are actively considering studying closer to home to save money or worrying about taking on debt to attend University. Obviously, this generation would have had to have been living on a different planet not have to be affected by the 24x7 news coverage of house prices, petrol prices, everything prices.

What tips their concern over the line between a passing interest and a real understanding of the unfolding crises is that a further 23% thought that the credit crunch in 2008 would equate to a career crisis in 2012, believing that their future career prospects are being changed by events happening today.

For 65% of today's children to be concerned over the financial instability of our global economy should inform the decisions being made by us all, and perhaps worry us at the same time, they are still children after all.

This concern could have a major cost to the UK education sector, with nearly half wanting their prospective university to provide them with a laptop to use or own while studying, and 34% could be enticed to study at a particular institution through the lure of a free one; an offer that could cost the UK Higher Education sector over £150million a year.

Not surprisingly, they don't worry about everything global, the impending skills crises and our position in global research and development being one of them.

Only 11% of this survey indicated they intended to study science while at college or university.

But, we will have a lot more media executives in 2012, 31% intending to study media, but will the current attraction to media studies over sciences position the UK economy to compete with the ever growing number of science graduates being produced in India or China? Even though 32% thought that they would compete mainly with UK students for the best places at university, 31% were just as concerned about European or Indian or Chinese students competing for their chosen course.

This science statistic should worry UK plc, and the governments of today and tomorrow - the UK clearly needs more scientists than screen writers. But it is also surprising and a little disheartening to know that while this generation are worried about the credit crunch, they do not yet equate a degree in a science to be a sure fire way of ensuring gainful employment in the future.

Perhaps government policy, which is more concerned with reaching a 50% student intake in higher education than the kinds of students being produced, has created this lack of appreciation.

Perhaps if Big Brother 2012 was previewed as 20 scientists in a lab developing a cure for cancer filmed non-stop for 12 weeks we may get a growth in physicists and less TV producers?

What is clear from The Realtime Generation Survey 2008 is that our country's children are happily evolving their IT experience to adapt to new technologies and leverage technology as an ever-more important part of their lives.

The most positive aspect of this survey is that technology, the Internet, and social networking are still only a part of this generation's life, and their ability to select what works for them, ensure their own security and management of their digital world should encourage us all.

The survey should give us all guidance on how we will deliver IT systems to our businesses and education institutions in the future. Flexibility of experience is going to be crucial and how we architecture our IT systems today will define how we provide an IT experience that works for our users now and in the future.

The UK clearly possesses a generation who can manage their own technology experience, and that represents a massive challenge to education and private sector organisations; providing a lot more customisation and a lot less enforced control will meet this generations expectations, it just may not fit in with the existing 'corporate' view of how we currently do things.

## The Survey

The UK Realtime Generation Survey 2008 was conducted with one thousand and four (1004) UK 13-17 year olds online and in person in May 2008. The survey was carried out independently by ClubdTV a specialist media entertainment company for the 13-17 year old marketplace.

## Survey Highlights

- Face-time not Facebook: While communications technology is clearly important to this generation a majority (29%) would still wish to communicate with a prospective university face-to-face than through any other communications or technology medium.
- The kids are alright: 78% are now more wary of social networking sites, not posting personal information or not using social networking sites because of security fears; this is a generation who know how to keep themselves safer online than society or our politicians would like to believe.
- Social 'not' working? 46% now believe that they use social networking less or that it is much less important in their social lives, do they have better things to do?
- Bebo wins social networking honors: Bebo is now clearly the social networking tool of choice in the UK, with 45% preferring to use this service for social networking while studying.
- The rising cost of being PC at university: 46% want their prospective university to supply them with a PC to use or own while they study. This could cost the UK university sector over 150million a year in PC provision. 34% would be enticed to study at a university if a free laptop was offered as part of the package.
- Digital media footprint of a UK student: The average 13-17 year old has 37GB of media storage available to them, and on average they have access to over 519 music or media files each.
- Credit Crunch 2008 = university intake crisis? 43% of 13-17 year olds believe they will have to study closer to home to save money while attending university or force them to reconsider taking on debt to attend university.
- Job Crunch 2012? 23% of 13-17 year olds think that today's credit crises will impact their future careers (some 4-8 years away). Only 35% believe the 2008 credit crises will have no impact on their future education or career decisions or choices.
- UK facing science skills shortage; but plenty of media moguls: Only 11% are planning to study science in higher education, with three times as many planning to study media courses (31%) and twice as many intending to study sports (23%).
- Students looking east and further east for top university course competition: 13-17 year olds expect as much competition for top university places from Europe and the emerging nations (China and India) as they do from the UK. 31% expect foreign students to compete for top places, only 1% behind the 32% competition expected from home.

- IT industry must make itself more exciting to attract new workers: While only 12% of 13-17 year olds had definitely considered a career in IT, 14% would do something in IT if they could find something that interested them and 21% would consider a career; so 47% could be tempted to join the dark side and not just consume IT but run it.
- Work, life, it's a balance but not that much: As in our 2007 survey, 80% of this generation are still thinking about their work life balance, and 20% think work should come before their family or social lives.

## Detailed Survey Results

1. Universities are looking to communicate with their prospective students prior to you starting your course. Which of the following would be your preferred method of communications?

- Face-to-face 29%
- Don't know yet 20%
- E-mail 16%
- SMS 10%
- Instant Messaging 8%
- Regular post 7%
- Telephone 6%
- Social Networking Site 4%

2. If made available, how long in advance of going to your chosen university would you like to become a part of the universities social networking environment?

- Don't know yet 48%
- 2 Month 16%
- 6 Month 14%
- 1 Month 13%
- 1 Year+ 10%

3. If you could choose a 'social networking' facility to be supported at your university, which would it be?

- Bebo 45%
- MySpace 21%
- I am not interested in using 'social networking' facilities 13%
- Facebook 9%
- I will use any networking site provided by the university 8%
- I have no preference 4%

4. Would you use a social networking facility provided by the university to join clubs, interested groups and get access to social activities?

- I don't know yet 49%
- Yes 37%
- No 14%

5. Would you like your lecturers to be members of your social networking communities?

- No, I think it would make the social networking too formal 40%
- Yes, it would help the learning experience 26%
- No, I don't think they will know what social networking is 19%
- Yes, definitely 15%

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

- I have become more concerned 34%
- I am now not joining social networking sites because of the publicised security fears 24%
- I am not concerned at all 23%
- I am now not posting personal information on social networking sites 20%

7. How do you view social networking in general?
  - Still a very important part of my personal and social life 27%
  - I use it more often now than I have ever done 26%
  - I use it less now than I have ever done 26%
  - It is becoming less important to me as time goes on 20%
  
8. When using e-mail at university would you prefer to:
  - Use your own personal e-mail account (provided by Hotmail/Google etc.) 33%
  - Don't know yet 27%
  - I would use both to keep my university and private emails separate 26%
  - One provided by the university 14%
  
9. Do you expect to own and pay for a personal PC when attending university or do you expect the university to provide on-campus PCs for you to use?
  - Don't know yet 30%
  - Have one provided by the university to own 26%
  - Own your own 24%
  - Have one provided by the university to use 20%
  
10. If you expect to have your own PC, do you expect this to be:
  - A laptop which you can use anywhere for any purpose 58%
  - A laptop which you carry around campus for University use only 25%
  - A PC just to be used from your place of residence but for any purpose 17%
  
11. Would the offer of a laptop entice you to join a particular university?
  - Don't know yet 43%
  - Yes 34%
  - No 23%
  
12. If access from mobile devices was permitted at your university of choice for messaging and virtual learning which mobile technology would you prefer to use?
  - Laptop 38%
  - None, I would prefer to use a desktop PC 19%
  - High specification mobile phone (iPhone) 18%
  - All 13%
  - Internet capable games machine 8%
  - Other 4%
  
13. Are you a regular user of Digital Media (Podcasts, YouTube, BBC iPLAYER, iPod)?
  - Yes, every day 27%
  - No, I have never listened or watched digital media files 27%
  - Yes, at least once a week 24%
  - Yes, but not very often 22%
  
14. Do you know how many Digital Media files you own?
  - No, I don't have any 26%
  - Yes, more than 100 but less than 500 21%
  - Yes, more than 500 but less than 1000 20%
  - Yes, in excess of 1000 files 17%
  - Yes, but less than 100 16%

15. If you have a digital media player, what storage capacity does it have?

- I don't own one 29%
- 100GB 21%
- 20GB 18%
- 5GB 17%
- 10GB 15%

[Average GB per 13-17 year old on digital media = 38GB]

16. How important will wireless (Wi-Fi) access to university systems and services be?

- Had not thought about it 33%
- Very important 31%
- Important 20%
- Not very important at all 16%

17. If you were visiting another university, how important would it be to be able to access the systems and services at your own university?

- Had not thought about it 32%
- Very important 27%
- Important 27%
- Not very important at all 14%

18. Do you already know which university you would like to study at?

- Don't know/have not thought about it 59%
- No 23%
- Yes 18%

19. Do you think the current global financial crises will affect your choice of university?

- No, I think don't think it will have any impact on my decision 35%
- Yes, I am now more worried about going into debt 24%
- No, but I do think it will influence my future career prospects 23%
- Yes, I think it will force me to study nearer home to save money 19%

20. Who do you think you will be competing hardest with for your first choice of university courses?

- I have not thought about it yet 37%
- Mainly students from the UK 32%
- Mainly students from the European Union 17%
- Mainly students from China, India and emerging economies 14%

21. Will the environmental credentials of a prospective university be important in your final choice of where to study?

- Don't know yet 36%
- Not really important 22%
- Important 21%
- Very important 13%
- Not at all important 9%

22. Do you think technology availability will play an important part in your university experience, and will it influence your choice of university?

- Yes, it will play a major part in my decision 34%
- Yes, but it will only be a small part of my decision 28%
- I had not thought about it yet 22%
- No, it will not factor in my decision 16%

23. What are the three most important IT services that you would want provided free of charge at your chosen university?

- PC or laptop access 54%
- Internet browsing 41%
- Email 29%
- Social networking sites 24%
- Video conferencing to home and friends 22%
- Online lessons 18%
- Digital media players 17%
- Podcast downloads of lessons 12%

24. What do kind of degree course do you intend to pursue at university?

- Media 31%
- Sport 23%
- Art 18%
- Humanities 18%
- Sciences 11%

25. Are you planning to pursue a future career in Information Technology?

- Don't know yet 32%
- No, but I would consider it 21%
- No, I have definite plans for career in other areas 21%
- Yes, if I can find something that interests me 14%
- Yes, definitely 12%

26. Do you think you will only ever work in the United Kingdom?

- Yes, I have no ambition to work abroad 46%
- No, I believe I will work in other countries 32%
- No, but I have no real ambitions at this time 22%

27. Would you think less of an employer who asked you to choose between your life outside of work and your career?

- Yes, but I would try to balance work and life myself 39%
- Yes, and I would find another employer 23%
- No, I expect work to come first 20%
- Yes, but I imagine that I would put up with it 18%