

Generation Digital

Solidarity despite uncertainty and challenges of change

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1 Introduction

The **CREDIT SUISSE YOUTH BAROMETER** 2018 gives an insight into the lifestyle and views of young people in the USA, Brazil, Singapore and Switzerland. The survey questions 16 to 25-year-olds in these countries on their hopes, their wishes for the future, their concerns and their social life. It also examines what they consider to be “in” and what is “out”, how they communicate and how they keep themselves informed about day-to-day events.

The youth barometer is designed as an annual monitor that allows conclusions to be drawn over time. The 2018 survey is the eighth since 2010. Various information sources served as a basis for the first questionnaire in 2010, which was based partly on individual elements from studies already conducted by gfs.bern and partly also on input from the 15th Shell youth study (Germany) and numerous discussions both with experts and with young people from Switzerland. The questionnaires for Brazil, the USA and Singapore were assessed by local experts and adapted where necessary to take account of the cultural differences, political circumstances or different customs in those countries. Particular importance was attached to maximum comparability. The selection of the countries surveyed was determined by the client and represents four different country types as regards the values subscribed to.

1.1 Database



The youth barometer data are obtained by means of an online questionnaire. The survey was conducted in Switzerland by the gfs polling service. In the USA, Brazil and Singapore, the international research organization Ag Knowledgegetech was commissioned to gather the data.

The online questionnaires themselves were held in April and May 2018. The analysis encompasses exactly 1000 respondents aged between 16 and 25 in the USA, Brazil and Singapore, as well as 1021 in Switzerland. The Swiss data were weighted for the analysis in order to optimize the sample structure with regard to gender, language, age distribution and level of education. In the present survey, aside from the design weighting by language region, only a post-stratification weighting by age was additionally undertaken. In the USA, Brazil and Singapore, quota sampling was used, so weighting is not necessary.

We consider the quality of the responses to be high. A few interviews of questionable quality were either already excluded by means of security questions in the programming or they were deleted in the ex-post quality check on the responses. On the basis of the results and the comparison with the Credit Suisse Worry Barometer, as well data and experiences from the previous years, we can assume that the data are plausible and that real-life conclusions are possible.

Table 1: Methodological details

Client	Credit Suisse AG
Population	Resident population of Switzerland / USA / Brazil / Singapore aged between 16 and 25 years
Data gathering	Online
Type of sampling	Switzerland: panel, snowball sampling, recruitment via social media International: survey of national panels
Survey period	April – May 2018
Sample size	Total respondents CH N = 1021 Total respondents USA N = 1000 Total respondents BR N = 1000 Total respondents SG N = 1000
Sample error	±3.1 percent with 50/50 and 95-percent probability

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1.2 Youth and generations – a discussion on terminology

The social sciences offer various definitions of youth. As a rule, the age range of 13 to 21 years is regarded as “youth”. In our survey, we focused on young people within an age range three to four years older, so some of the young people in the survey were slightly above the upper limit of the range according to the usual social sciences definition of youth. This is explained, on the one hand, by the longer periods in education on average and, on the other hand, by the focus of the study on the time after compulsory schooling with training and career choices. For this reason, the questionnaire for the youth barometer is aimed at 16 to 25-year-olds living in Switzerland, the USA, Brazil and Singapore.



The youth barometer has remained a “millennial barometer” in the true sense of the expression to this day: 1985 was the first year that found its way into the 2010 survey. The youngest respondents in the 2018 survey were born in 2002.

While the respondents in the 2010 survey were exclusively from the much-cited Generation Y (born between 1980 and 2000), subsequent surveys see more and more of the 1000 respondents in the country concerned coming from Generation Z (born from 2000 onwards). Within the group of millennials, therefore, there has been a slight generational shift.

All those represented in the youth barometer are so-called digital natives, and most of them cannot remember a time without the internet. Technological change, increasingly subsumed also under the watchword “digitization”, is decisively shaping the lives of the millennials. Their growing-up coincides with the rapid global spread of the smartphone.

Generation Y is associated with a good education, high expectation of jobs, the reconcilability of career and spare time and a strong focus on communities. It is a generation that has grown up overall in a relatively high degree of economic, social and physical security. This applies less to young people who belong to Generation Z. Their adolescence is marked by economic and political crises, an increase in terrorism and a world of ever greater complexity. As Generation Y gradually passes on the baton to Generation Z in the youth barometer, we accordingly expect to see also a gradual change in the values and ideas measured in the survey. For the time being, however, it is still Generation Y that predominantly inform the results of the youth barometer: of the 4000 or so 16 to 25-year-olds surveyed, 16 percent belong to Generation Z today and 84 percent to Generation Y.

1.3 Comparison of countries

We confine the comparison of countries, based on Switzerland’s youth, to the most conspicuous parallels and differences in the remaining three countries. The number of countries is too small for an international comparative approach that would allow conclusions to be drawn with any validity beyond that for these individual countries. Nevertheless, the selection of the four countries (Switzerland, USA, Brazil and Singapore) encompasses four different cultural types.

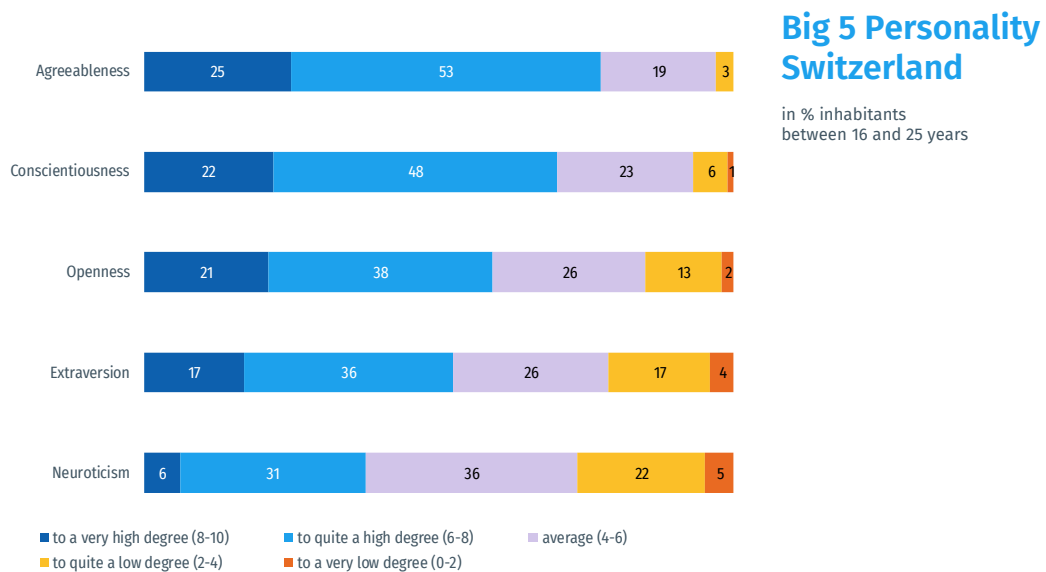


According to the so-called **OCEAN MODEL USED IN THE PSYCHOLOGY OF PERSONALITY TRAITS** the personality of each individual can be broken down into the **Big 5** personality dimensions of **OPENNESS**, **CONSCIENTIOUSNESS**, **EXTRAVERSION**, **AGREEABLENESS** and **NEUROTICISM**. In this year’s youth barometer, the Big 5 were covered for the first time by 15 questions to draw up a personality profile of each country.¹

In Switzerland, the dimension of agreeableness is especially marked. In 78 percent of 16 to 25-year-olds, agreeableness is present to a very high or quite high degree. Conscientiousness follows in second place and openness in third place. A small majority of 53 percent is extraverted to some extent at least. Neuroticism is the least widespread personality trait. Nevertheless, 37 percent of respondents still show some personality traits of this type. In the standard measurement approach, neuroticism is operationalized through questions as to how relaxed and resistant to stress a person is, how often a person is worried and to what extent a person gets easily nervous or not.

¹ Table Composition of indices according to Freitag (2017) in the appendix

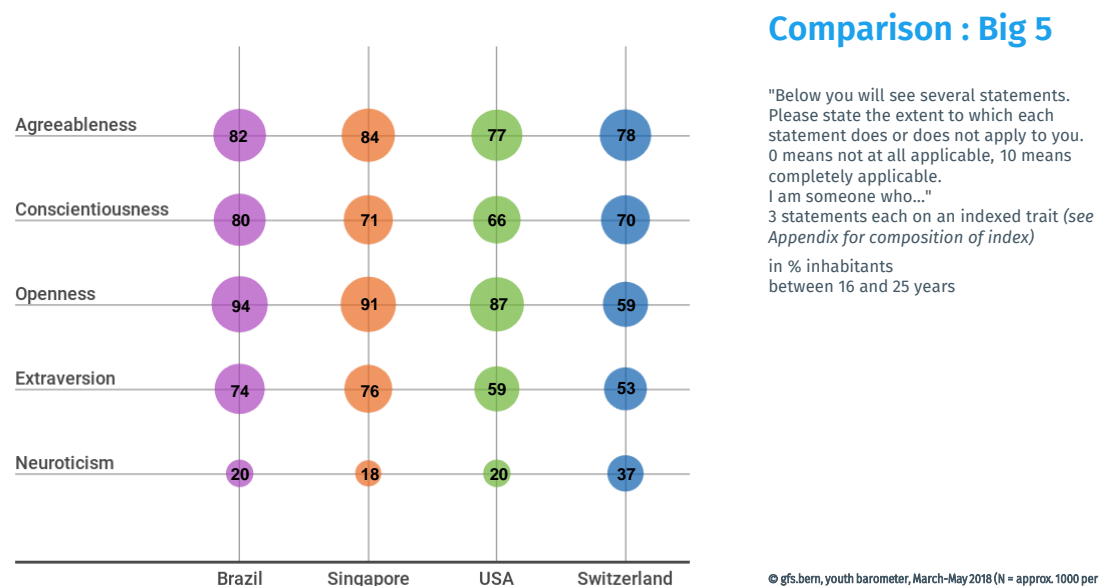
Figure 1



© gfs.bern, youth barometer, March-May 2018 (N = 1021)

Brazil and Switzerland in particular stand out in the country comparison: in Brazil, young people are particularly extraverted, open and conscientious. On the other hand, there is a striking proportion of young people in Switzerland (at 37 percent) who show a very high or quite high degree of neuroticism. The following figure shows how marked the various dimensions are among 16 to 25-year-olds in each country (proportion of high/quite high scores).

Figure 2



2 Results of 2018 youth barometer

2.1 Trends – what is “in”

2.1.1 Switzerland

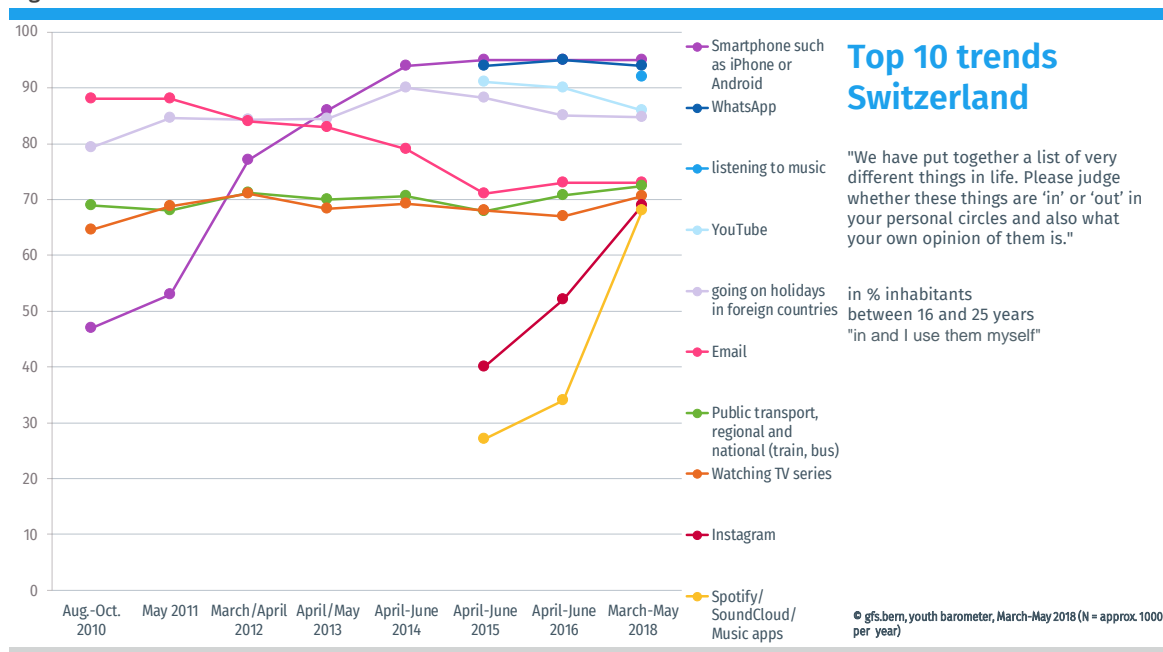
Today's trends are determined by the technological changes taking place and driven by innovations in the field of communications. Of more than 60 activities, objects or applications queried, the figure below shows the 10 that were described by most young people in Switzerland as “in” and as something they like doing or using themselves.



Among the 10 things in life that are seen in Switzerland as most “in” in 2018 and are also done by young people in their daily lives, at least six are the result of digitization – including the trend *par excellence* of the last few years: the smartphone.

But these also include WhatsApp, YouTube, email, Instagram and streaming services such as Spotify or SoundCloud. The last two offerings in particular are spreading with similar speed today as the smartphone did in 2010. Likewise among the top activities and things that young people do themselves and regard as “in” are listening to music, taking vacations abroad, using public transport and watching TV series.

Figure 3



2.1.2 USA

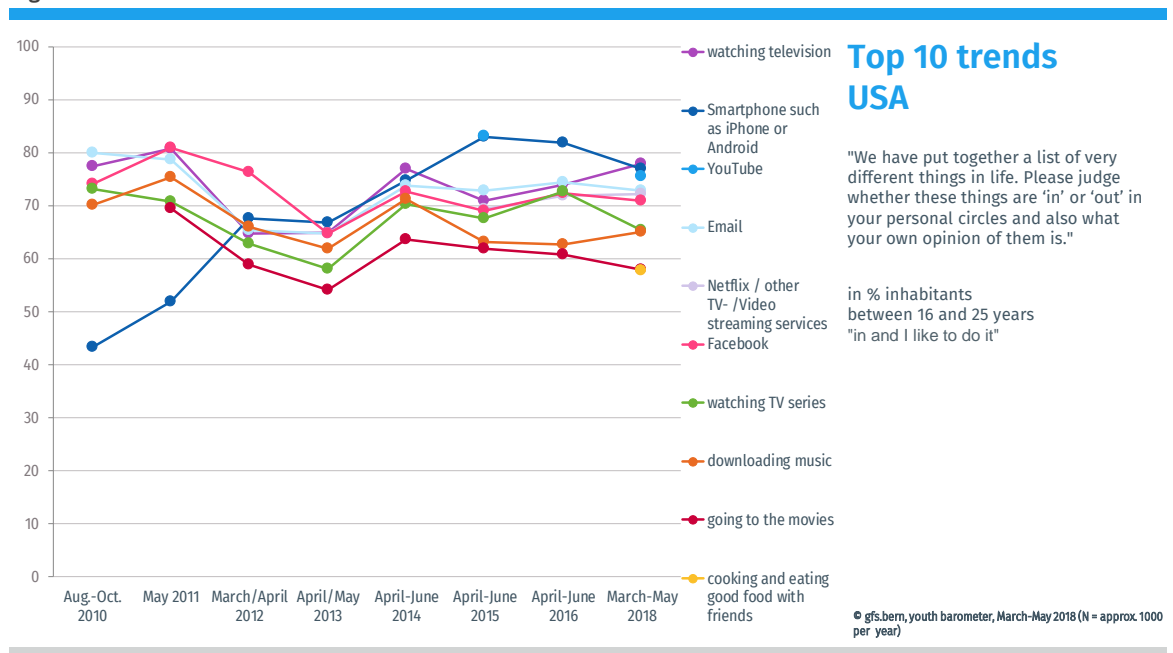
Whereas Facebook is already no longer among the ten things regarded as most “in” in Switzerland, it still is in the USA. In 2018, Instagram still does not quite make it into the top trends (54% see Instagram as “in” and as something they use themselves). On the other hand, on-demand streaming services, such as that of US company Netflix, are among the trend activities.



Compared with Switzerland, TV in the USA enjoys a higher standing. For no other activity are there more young people who see it as “in” and something they like doing.

Going to the movies and also cooking and eating good food with friends are the only two activities that are decidedly social and communal in nature. But going to the movies in particular has become much less trendy in recent years.

Figure 4



2.1.3 Brazil

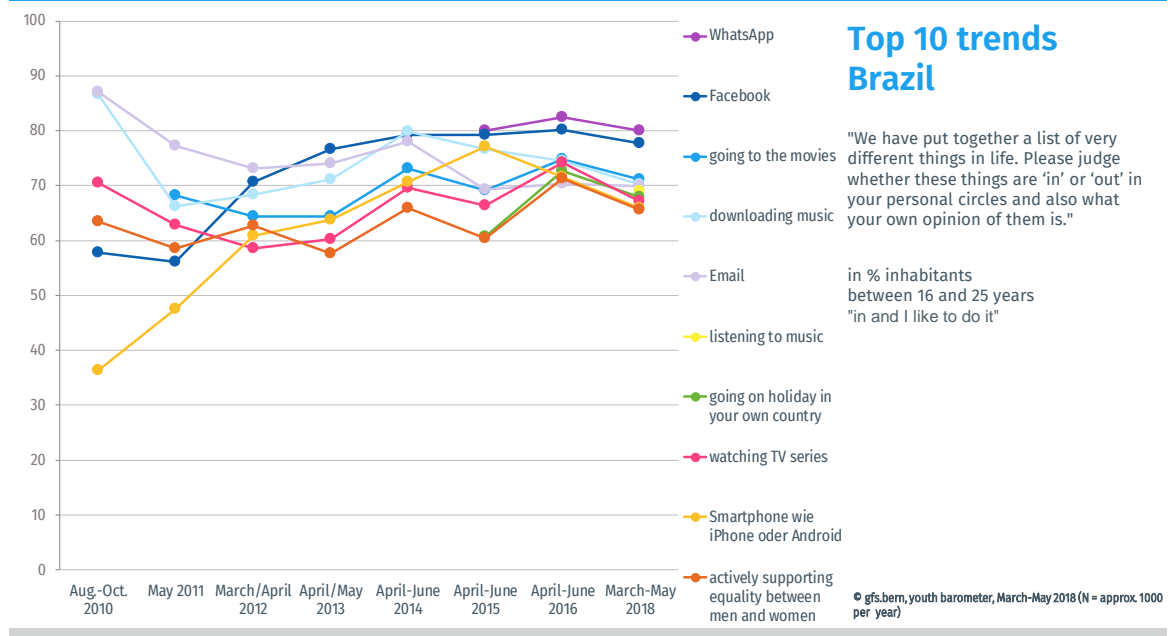
As in the three other countries surveyed, in Brazil too it is primarily digital offerings in entertainment and communications that are among the most important trends of recent years.



Unlike in the other three countries, engagement for gender equality is also among the top trends in Brazil. This is the only political activity among the top 10 in all countries.

In the Global Gender Gap Index of the World Economic Forum, Brazil lags behind the USA, Switzerland and Singapore. According to the report, women in Brazil particularly lack political empowerment, while they score exceptionally well when it comes to health and also both economic and educational issues.

Figure 5



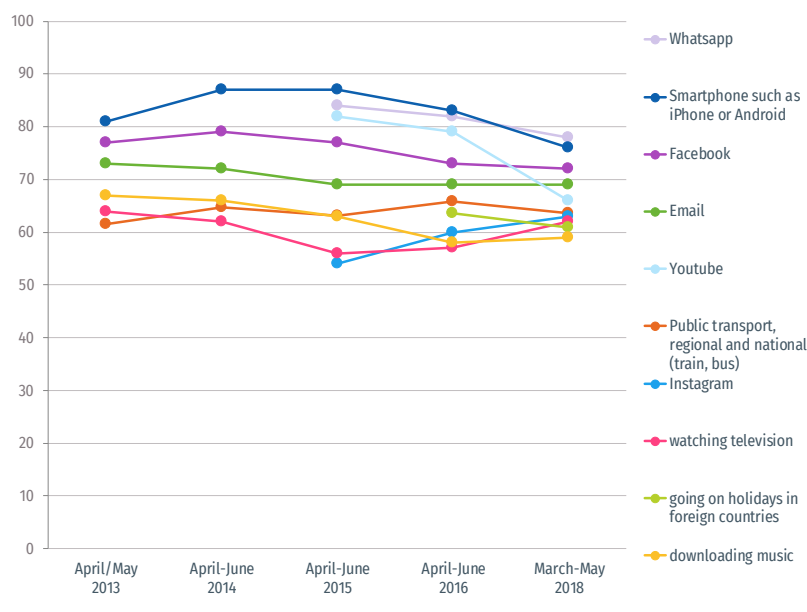
2.1.4 Singapore

Singapore has been one of the countries surveyed in the youth barometer since 2013. As in the USA and Switzerland, the smartphone here is seen as less "in" than it was a few years ago. This is down to the fact that iPhones and the like are now such a fixture in the day-to-day life of young people that it is no longer possible to speak of a trend.



While Facebook and in particular YouTube are less trendy, Instagram is considered trendier. The app is described by 63 percent of all young people in Singapore as "in" and as something they like using themselves.

Figure 6



Top 10 trends Singapore

"We have put together a list of very different things in life. Please judge whether these things are 'in' or 'out' in your personal circles and also what your own opinion of them is."

in % inhabitants between 16 and 25 years
"in and I like to do it"

© gfs.bern, youth barometer, March-May 2018 (N = approx. 1000 per year)

2.2 Flops – what is “out”

Cars – whether SUVs or electric cars – do not feature in the lives of 16 to 25-year-olds. Very few describe them as “in” and something they use. E-bikes, too, have little appeal, as do consuming drugs, smoking and the military. Getting involved in clubs or organizations are also among the 10 things which are least “in” and which people do least in all countries except in Switzerland. Engagement in political parties is likewise among the things that are least “in”.

Figure 7



Bottom 10 trends across all countries

We have put together a list of very different things in life. Please judge whether these things are 'in' or 'out' in your personal circles and also what your own opinion of them is."

n % inhabitants between 16 and 25 years, mentions with lowest proportion of in & I like using/doing it myself"

© gfs.bern, youth barometer, March-May 2018 (N = approx. 1000 per country)

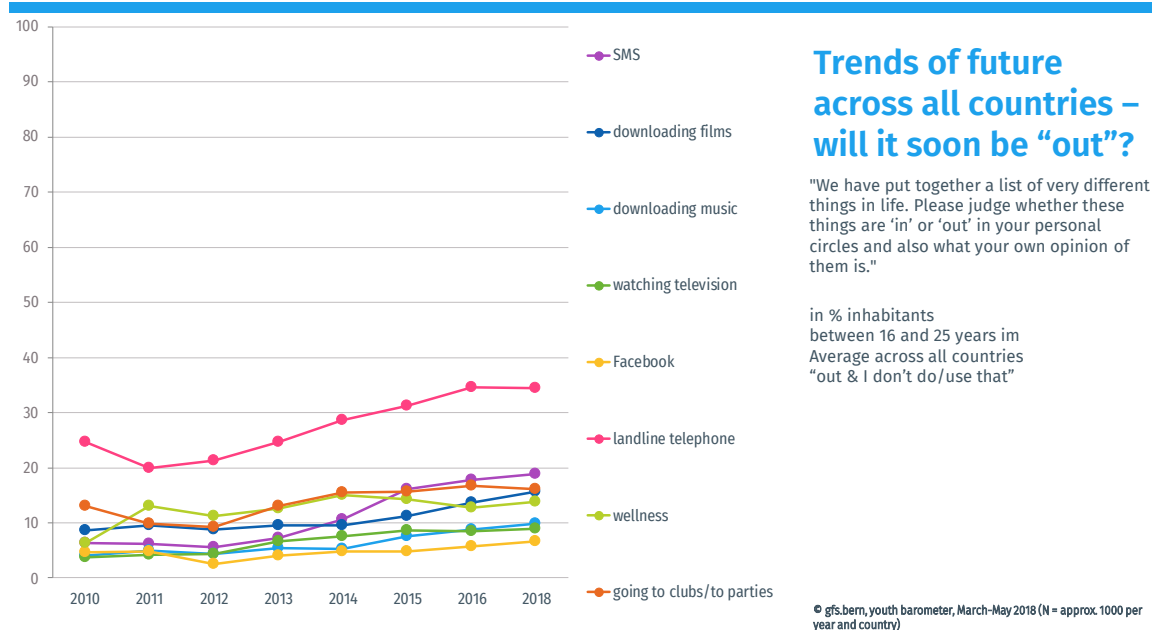
On average, across all countries, there are some activities for which there has been a relatively systematic increase in the proportion of young people who regard them as “out” and who also do not engage in them themselves. The landline is ever less firmly anchored in the lives of young people, and SMS is also increasingly regarded as “out”. These developments are to be seen as a natural counterpart to the spread of smartphones.



The 1980s and 1990s saw the rise of video cassettes, while the 2000s saw the emergence of DVDs and soon also the first specialized download platforms. Today, we are witnessing another revolution in the consumption of music and films. Downloads are increasingly seen as “out”.

Instead, young people are getting the content they want through streaming services. In keeping with this development, TV is also increasingly regarded as “out”, as is Facebook. Since 2012, going to “clubs and parties” is again more frequently seen as “out” by young people. Even though those who don’t go to parties are clearly in the minority among young people today, it remains to be seen whether this trend will become further accentuated now that Generation Y is gradually making way for the members of Generation Z.

Figure 8



2.3 Politics and voluntary engagement are increasingly “in”

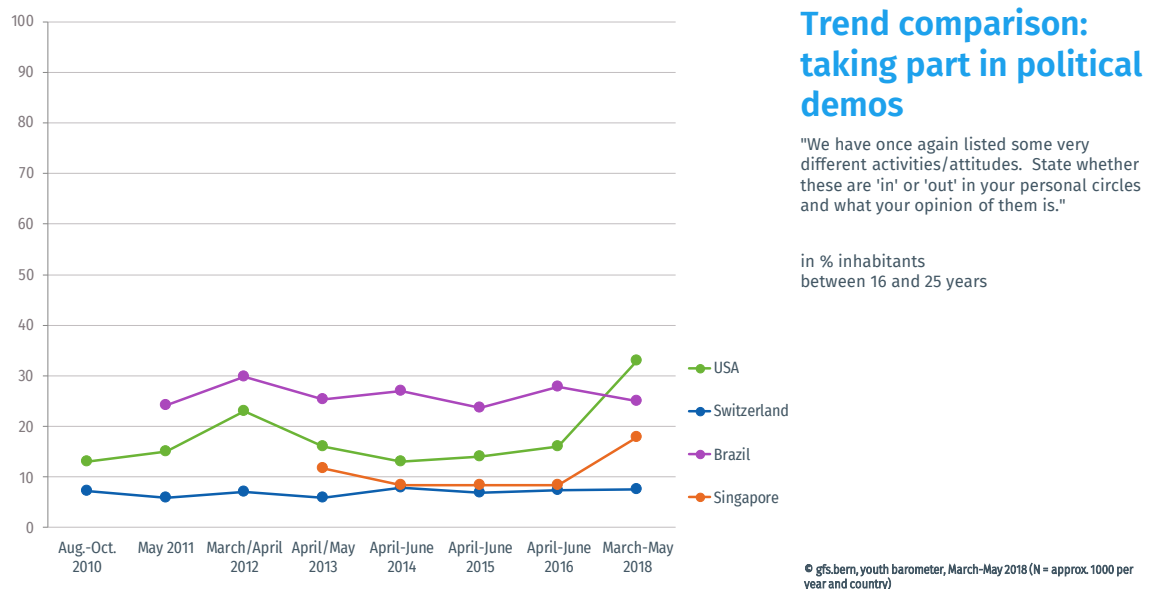


Politics is a fascinating topic, because it is apparent here that politics can come in a variety of shapes and sizes. While participation in institutional politics in the form of party membership is one of the least “in” things in all the countries surveyed, only in Switzerland does this apply to taking part in political demonstrations.

In Brazil, Singapore and the USA, taking part in political demonstrations is seen as “in” by a greater proportion of young people than it is in Switzerland, which also goes some way towards indicating a re-politicization of the young generation. In contrast to older cohorts, young people selectively champion causes that concern them, but do not let themselves get tied down in fixed structures.

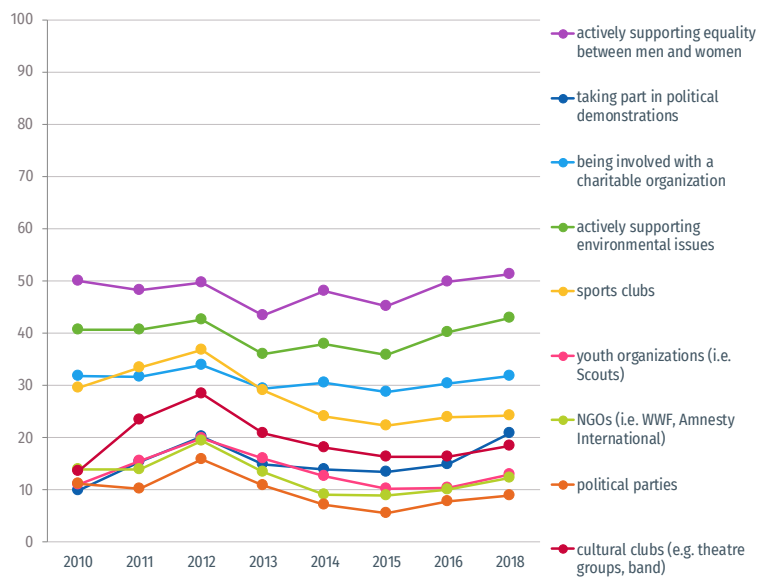
In the USA, in particular, a veritable leap is discernible in the proportion of young people who regard demonstrations as “in”. Events such as the election of Donald Trump, the emergence of the MeToo movement and the debate on stricter gun laws have clearly left their mark. The debate on gun laws is also reflected in the expressed worries of young people in the USA.

Figure 9



After young people at the start of this second decade in the new millennium tended to be more reticent when it came to voluntary engagement, the perception of such activities as something that can also be “in” has been increasing again in recent years. The new willingness to take part in political demonstrations is evident in some countries. But across all countries, never have as many young people as today said that engagement for gender equality or for the environment is “in”. It remains a fact, however, that engagement in institutionalized structures is seen as less attractive than individualized, selective political engagement.

Figure 10



Trend for voluntary engagement of youth

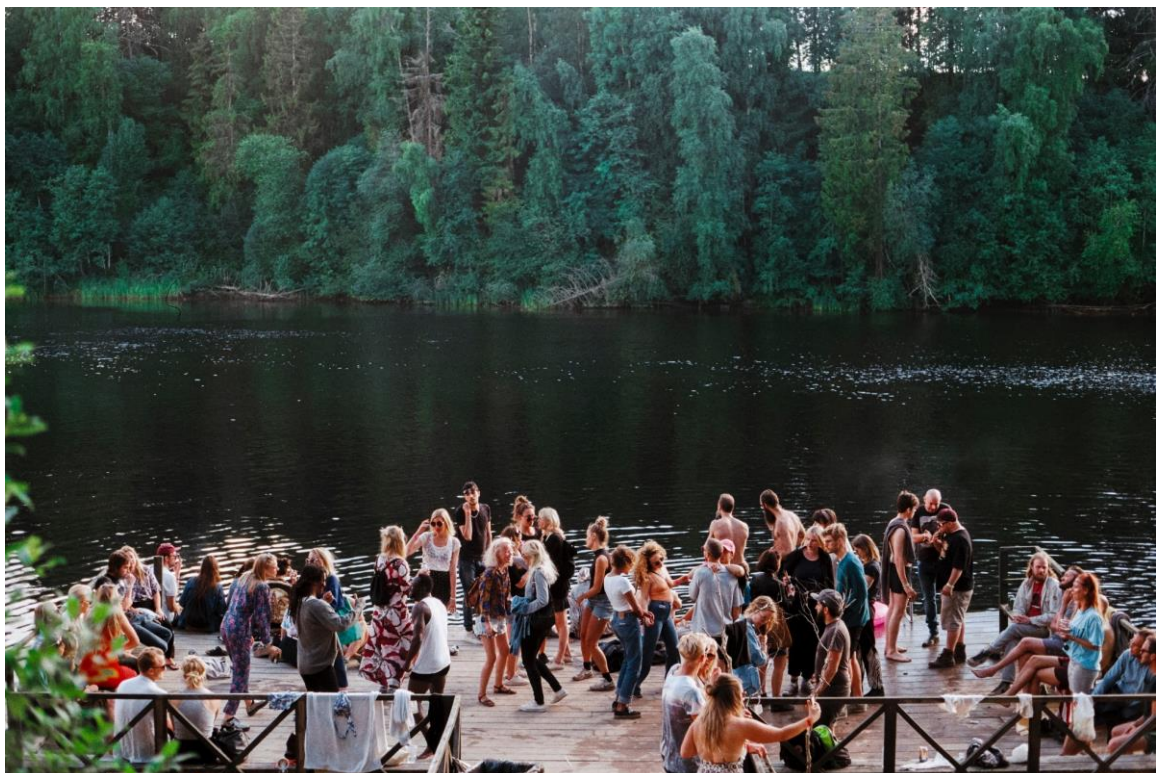
"We have put together a list of very different things in life. Please judge whether these things are 'in' or 'out' in your personal circles and also what your own opinion of them is."

in % inhabitants
between 16 and 25 years im
Average across all countries
"in and I like doing it"

© gfs.bern, youth barometer, March-May 2018 (N = approx. 1000 per year and country)

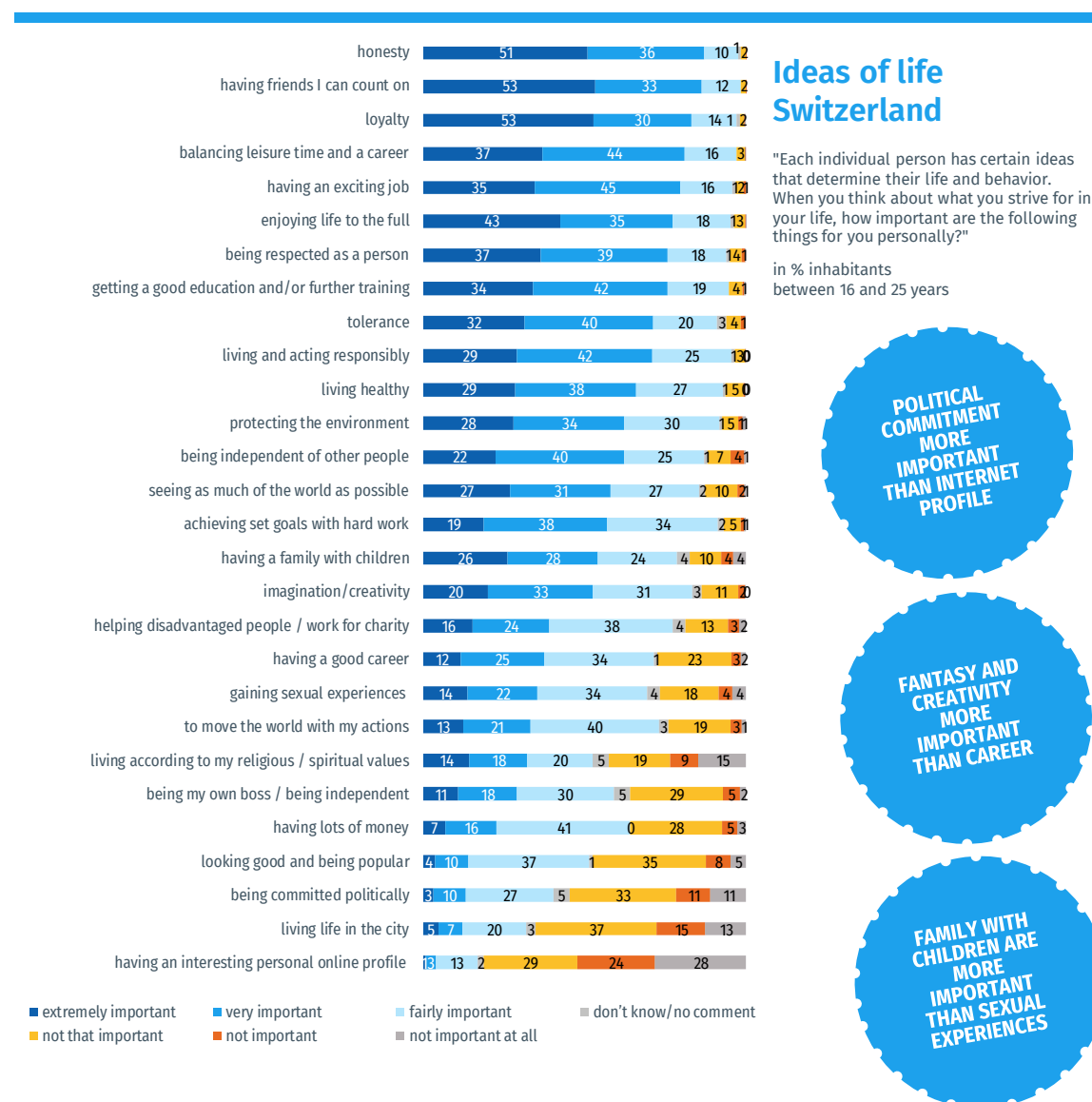
2.4 Ideas of life

It is above all human and social needs that are seen as particularly important in life for most young people in Switzerland. Foremost among these needs are honesty, reliable friends and loyalty. Priority is likewise given to enjoying life (78%) and achieving a balance between job and private life (81%), which thus assume a far more important role than is the case for example with economic status: Making a career for oneself is extremely or very important for 37 percent, while only for 23 percent does this apply to having plenty of money.



Although the rise of social media dominates youth trends worldwide, only 4 percent of young people in Switzerland say it is (extremely/very) important for them to have an interesting internet profile. Even political engagement, which is only present to a limited extent in Switzerland, is mentioned more frequently here.

Figure 11



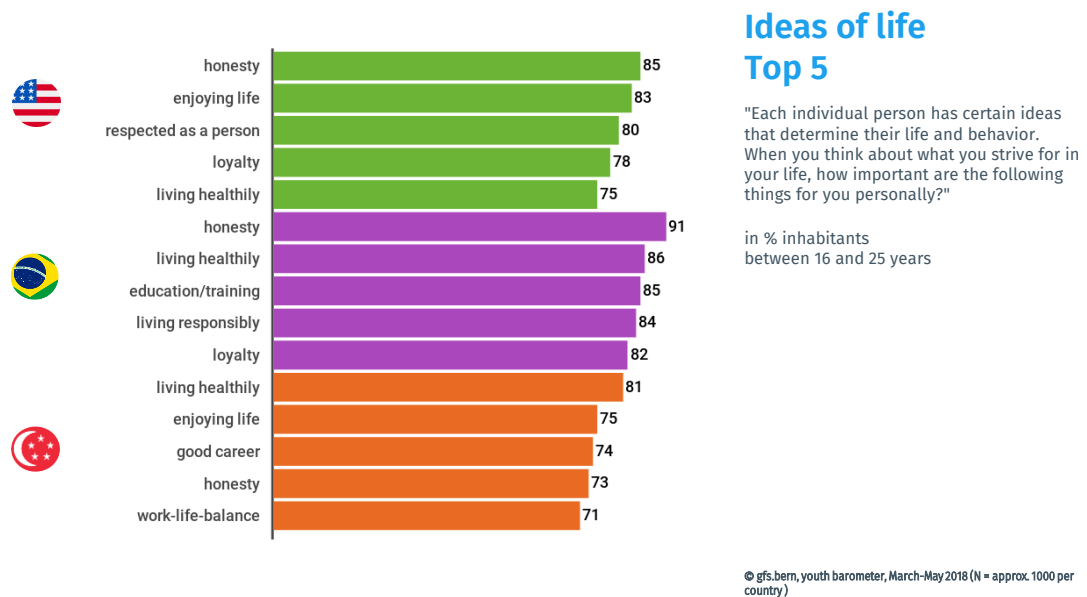
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Honesty and loyalty are just as important in the lives of young people in the USA, Brazil and Singapore as they are in Switzerland. In contrast to Switzerland, greater value is also attached to a healthy life. This applies in particular to young people in Singapore. According to a ranking by the medical journal *The Lancet*, Singapore is also the country that is making the greatest progress in achieving the UN's Sustainable Development Goals (SDGs) in the field of health.² The high value attached to health is also clearly reflected in values and priorities of young people. Young people in Singapore also

² Measuring progress and projecting attainment on the basis of past trends of health related Sustainable Development Goals in 188 countries (2016)

consider it much more important to make a career for oneself than young people in Switzerland do.

Figure 12



2.5 Future of society

Despite some uncertainties and worries, today's youth is optimistic about its **OWN FUTURE**. Fewer than 15 percent of respondents in Singapore and Brazil and fewer than 10 percent in the USA and Switzerland see a rather gloomy outlook for themselves.

With regard to the **FUTURE OF SOCIETY**, however, today's 16 to 25-year-olds are more sceptical. This applies in particular to Brazil, where 56 percent say the future looks rather bleak. In Switzerland and the USA, by contrast, the predominant picture is one of mixed feelings. While the largest proportion of respondents do not want to be seen as doomsayers, they also express no optimism. Optimism is only voiced by young people in Singapore, where the greatest confidence prevails compared with the other countries.

Figure 13

Comparison of own future and future of society

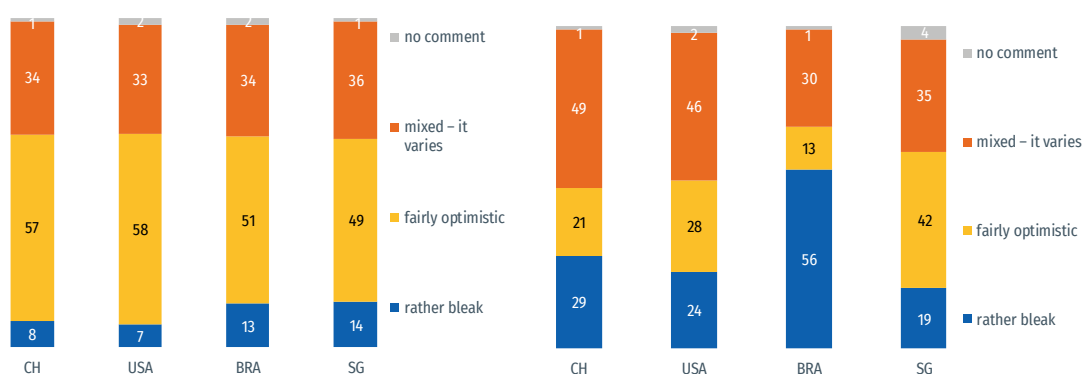
in % inhabitants, between 16 and 25 years

Own future

"In your opinion, what is the outlook for your own future? At the present time, do you see the future ..."

Future of society

"And what about the future of our society? Do you see it ..."



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A comparison of the values that the four countries achieve in the UN's Human Development Index shows Switzerland ahead in 2nd position, followed by Singapore in 5th position.

While Switzerland has been one of the wealthiest and safest countries in the world for decades, Singapore has grown from an emerging nation to an international financial centre within just a few decades since gaining its independence in 1963.³ It is probably also this boost from the recent past that is driving optimism for the future. The USA is ranked 10th in the index and Brazil 79th.

³ Inequality-adjusted Human Development Index (2016)

Figure 14

Development and innovation

Human Development Index



Global Innovation Index



● Brazil ● Singapore ● USA ● Switzerland

© gfs.bern, youth barometer, March-May 2018, Data: Human Development Report 2016, United Nations / Global Innovation Index 2017 rankings, Cornell University und World Intellectual Property Organization

The optimism of young people in Switzerland has fallen somewhat since the start of the surveys. Compared with 2010, twice as many young people today – albeit from a very low level – see a gloomy outlook for their own future. They also tend to be rather more pessimistic regarding the future of society than they were in 2010.

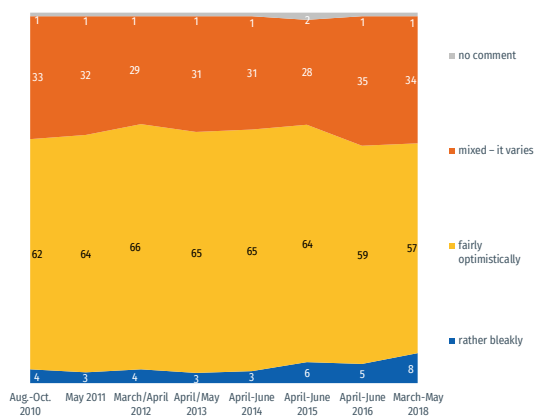
Figure 15

Assessment of Switzerland's future

in % inhabitants, between 16 and 25 years

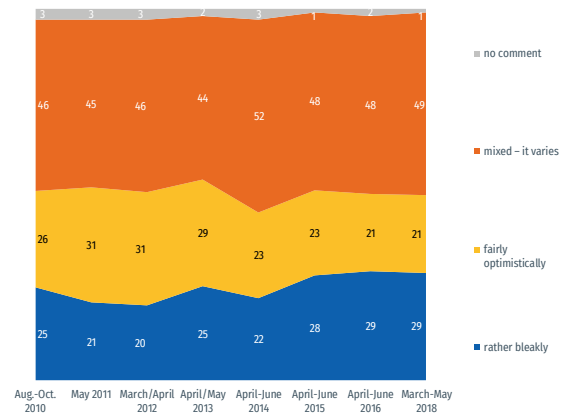
Own future

"In your opinion, what is the outlook for your own future? At the present time, do you see the future ..."



Future of society

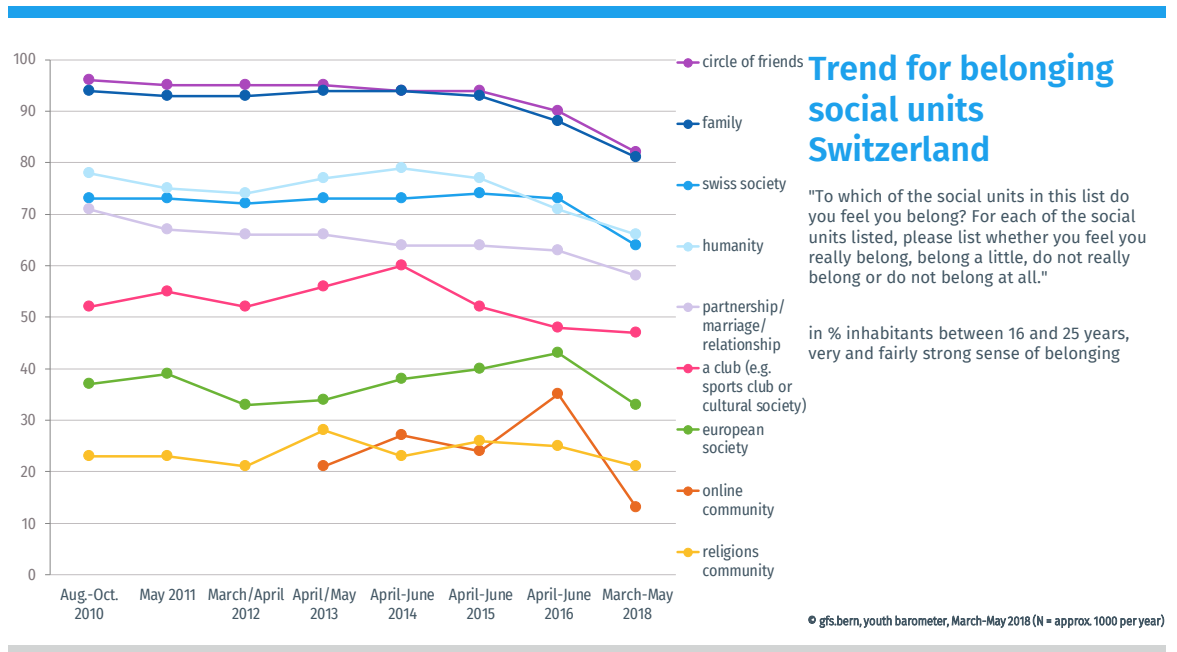
"And what about the future of our society? Do you see it ..."



© gfs.bern, youth barometer, March-May 2018 (N = approx. 1000 per year)

Prosperity and development are an important factor for future prospects. But aside from economic factors, social cohesion probably also plays a crucial role in the assessment. The sense of belonging to various social units is especially strong in Switzerland. A clear majority has a sense of belonging to a group of friends, their family and also Swiss society as a whole. But the data from the Credit Suisse Youth Barometer also clearly show that this sense of belonging is increasingly coming under pressure in Switzerland.

Figure 16



The trend towards a declining sense of belonging to specific social units is discernible not only in Switzerland, but also in Brazil and occasionally in the USA as well.

2.5.1 Social cohesion

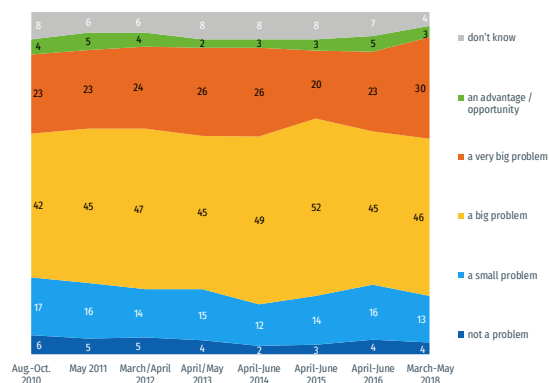
Despite young people's declining sense of belonging to specific social units, the data point in a positive direction especially on two key questions of social cohesion in Switzerland. In keeping with the increased perception of problems concerning old-age pensions also among young people, ever more 16 to 25-year-olds see it as a problem that there will be more and more people of retirement age in Switzerland. At the same time, the proportion of young people who consider relations between young and old to be strained has not increased over the years. On the contrary, there has tended to be a growth in the proportion of those who consider relations to be harmonious. The problem of an uncertain future for old-age pensions is seen as something political and not as a fundamental wedge between the old and young in Switzerland. There appears to be solidarity between the generations.

Figure 17

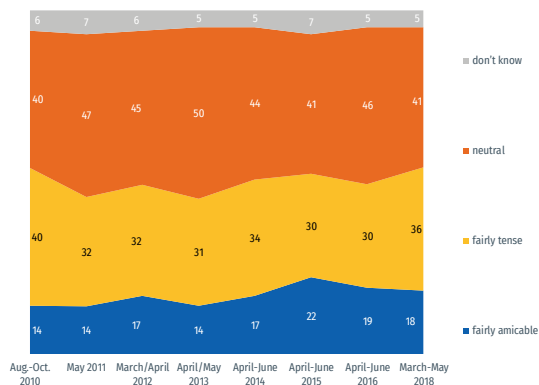
Generational solidarity Switzerland

in % inhabitants, between 16 and 25 years

Trend - Problem with elderly people



Trend - Relations between youth and elderly



© gfs.bern, youth barometer, March-May 2018 (N = approx. 1000 per year)

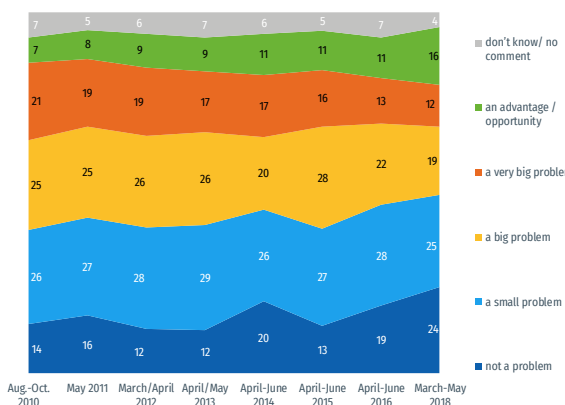
A trend towards greater solidarity is also discernible in the social coexistence of different cultures. The proportion of young people in Switzerland who see it as a problem that more and more foreigners will live in Switzerland in the future has been markedly declining since 2010. Instead, ever more young people actually see it as no problem or even an advantage or opportunity. Since 2010, the proportion of young people who regard relations between young Swiss people and young foreigners as harmonious has also tripled.

Figure 18

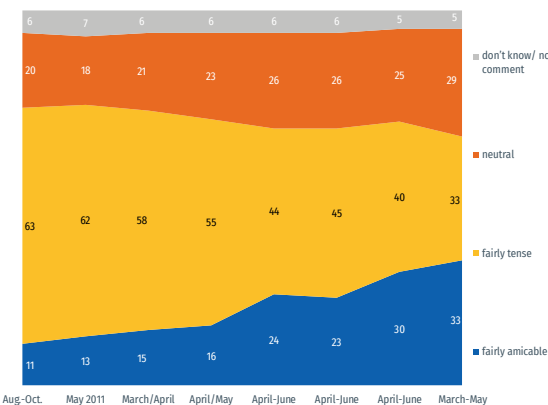
Cultural solidarity Switzerland

in % inhabitants, between 16 and 25 years

Trend - Problem with foreigners



Trend - Relations between young Swiss and foreigners



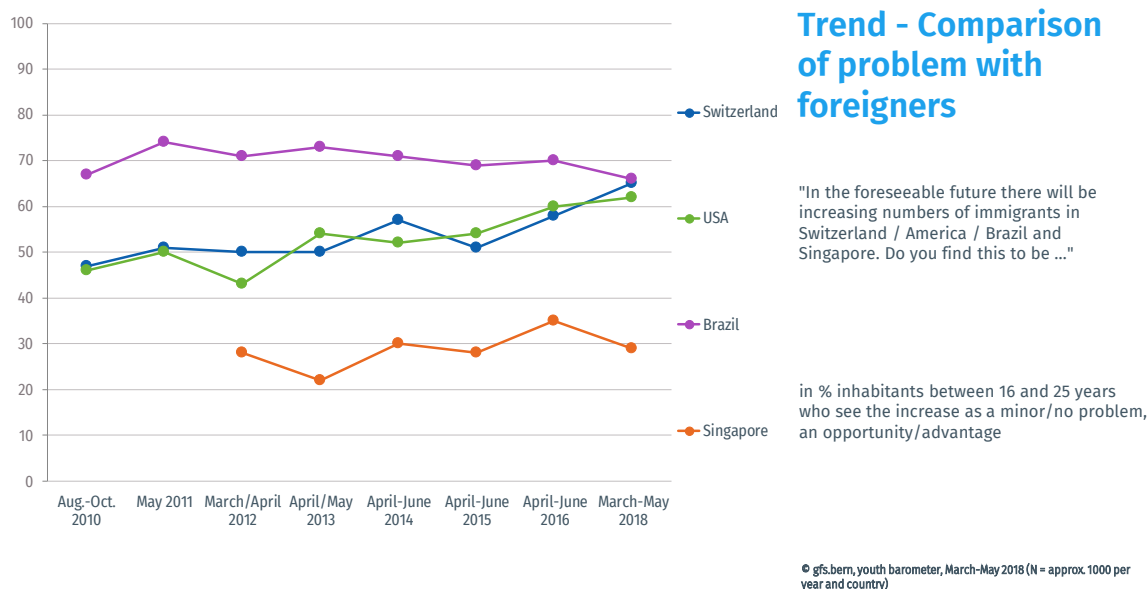
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In Brazil, the proportion of young people who feel only a slight problem of pressure in relation to immigration from abroad is traditionally higher than that in the other countries surveyed. By contrast, the growing proportion of foreigners has tended to be seen as a problem in Singapore since the start of the surveys.



In the USA, by contrast, a development similar to that in Switzerland is discernible. The proportion of young people who see immigration as only a minor problem, no problem or even an opportunity is increasing.

Figure 19



2.6 Expectations in terms of industry and employers

The education system is the sector in which most young people in Switzerland want to work. In second place is the media, followed by tourism and the travel sector. At 47 percent, almost half of all 16 to 25-year-olds in Switzerland also say they would like to work in administration. Only after this comes the IT and tech sector in fifth place; in all other countries surveyed, this sector is by far the most coveted by young people. In the USA, 75 percent say they would like to work in the IT sector, in Brazil 72 percent and in Singapore 75 percent. In Switzerland the proportion is just 43 percent.



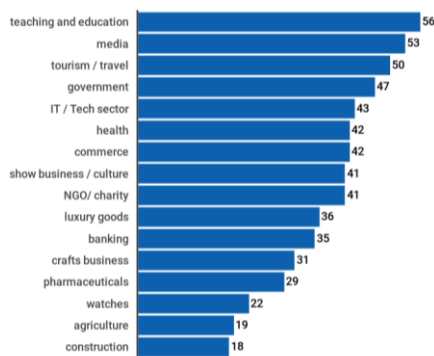
Although Switzerland is the most innovative country in the world according to the Global Innovation Index, young people would prefer to work in administration than in the tech/IT sector.

Figure 20

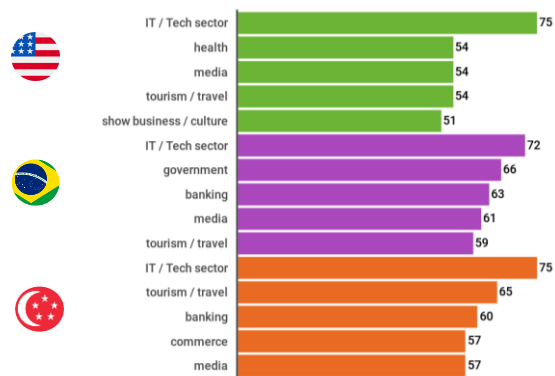
Preferred employment sectors

in % inhabitants, between 16 and 25 years

Preferred employment sectors in Switzerland



Top 5 employment sectors in other countries



© gfs.bern, youth barometer, March-May 2018 (N = approx. 1000 per country)

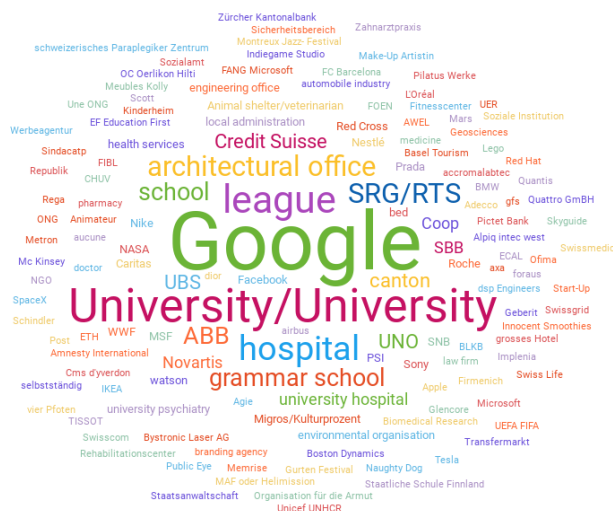
Broken down into specific companies, Google remains the dream employer that most young people spontaneously mention. For 16 to 25-year-olds in the USA, Brazil and Singapore, however, the idea of self-employment is also extremely popular. This is less discernible in Switzerland; here, in keeping with the analysis according to sectors, Google is followed by administration (federal and cantonal) as well as organizations with administrative functions (university and hospitals). Also frequently mentioned are the Swiss Broadcasting Corporation, architecture offices, ABB, Credit Suisse and various educational institutions.

Figure 21

**Dream employer
Switzerland**

"What company would you like to work for the most, what would be your dream?"

in % inhabitants
between 16 and 25 years



© gfs.bern, youth barometer, March-May 2018 (N = 1021)

As a comparison with Switzerland, the word cloud below provides a picture of dream employers in the USA. Google here is likewise the company that has the most appeal for young people. But compared with Switzerland, other IT companies such as Microsoft, Apple or IBM are likewise mentioned relatively often. The most frequently mentioned

employment in the USA, however, is the dream of self-employment. This is also the most popular form of employment in Brazil and Singapore, albeit less marked than in the USA. There is a clear distinction here between Switzerland and the other three countries. However, the education and healthcare systems and also state institutions are popular in all four countries, but are seen as much more important in Switzerland than elsewhere.

Figure 22



Dream employer USA

"What company would you like to work for the most, what would be your dream?"

in % inhabitants between 16 and 25 years,
proportion "very/fairly important"

© gfs.bern, youth barometer, March-May 2018 (N = 1000)

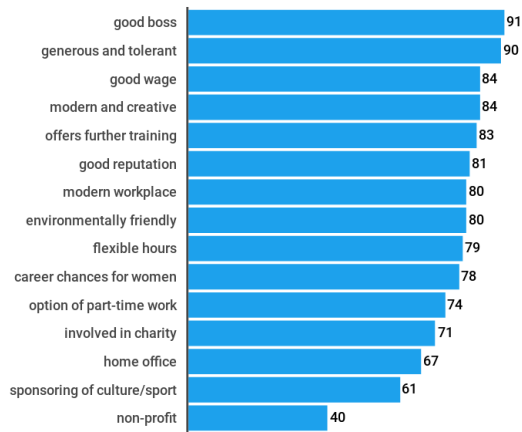
On the whole, the most important expectations that young people have of their future employers are very similar and stable over time in all countries. The most important requirement is to have a good boss and employer that is generous and tolerant. This is followed in third place by a good salary, which is as important as having an employer that is modern and offers room for creativity. Finally, a factor that is not to be underestimated is also reputation. For 81 percent of young people, it is important that the company has a good reputation in the market. A work environment that is as flexible as possible and offers the option of part-time work, along with working from home and flexible working hours, is seen as desirable by a majority, but these factors are clearly not a top priority.

Figure 23

Ideal aspects of employer

"How important are the following factors in an employer?"
in % inhabitants, between 16 and 25 years

International



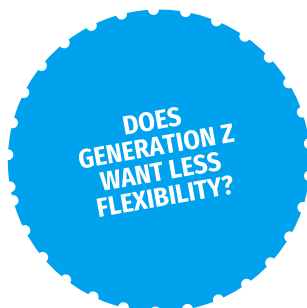
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Between respondents from Generation Y (today aged 19 to 25 years) and the younger respondents of Generation Z (maximum 18 years of age) there are no differences when it comes to the most important aspects of a future employer. Having a good boss is the most important thing for both cohorts. But especially when it comes to flexibility in employment – i.e. working from home, flexible work time or also part-time work these factors are much more important to Generation Y. This now begs the question as to whether this is a generational effect and the need for a flexible work environment really is less important to Generation Z, or whether the younger respondents have simply not yet had sufficient experience of working life to offer a conclusive view of their preferences on these issues.

Figure 24

Ideal aspects of employer by generation

"How important are the following factors in an employer?"
in % inhabitants, between 16 and 25 years



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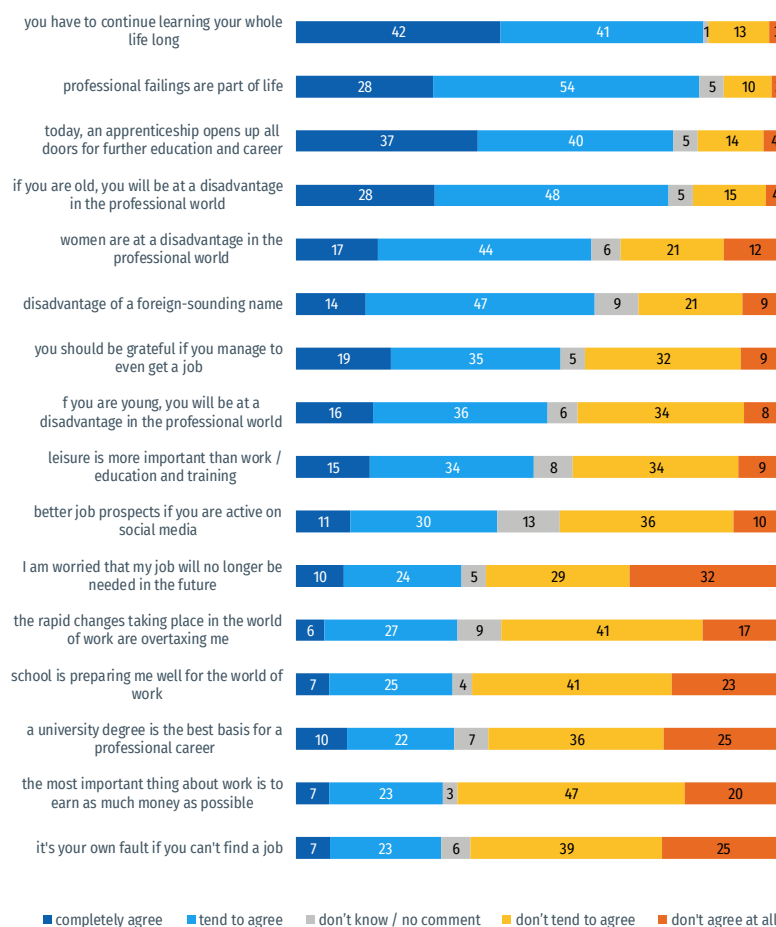
There is broad awareness of the need for lifelong further training among young people in Switzerland. No statement on career and education enjoys a higher approval rating.

Although young people in Switzerland – unlike in the other countries surveyed – tend less towards employment sectors fraught with risks, such as IT or self-employment, they clearly agree with the statement that career failures are also a part of life.



Discrimination on the grounds of individual characteristics is clearly seen as an issue by young people in Switzerland: in each case, a majority takes the view that people are discriminated against in the world of work because they are seen as too old (76% in agreement), because they are women (61%), because they have a foreign name (61%) or because they are seen as too young (52%).

Figure 25



Statements on job and education Switzerland

"To what extent do you agree with the following statements about work, education and training?"

in % inhabitants between 16 and 25 years

Digitization is not only changing our lives, but also transforming the way we work and the jobs we do. Not everyone is able to cope with the rapid change equally well. But in comparison with other countries, young people in Switzerland are relatively relaxed about the rapid changes.

In Switzerland, 34 percent of young people are worried that their job will no longer exist in the future. That is certainly a significant proportion, but in the other three countries the number of respondents who fear for their jobs is more than twice as high. The same applies to the statement that the rapid

LESS FEAR OF
DIGITIZATION
IN
SWITZERLAND

changes in the world of work are overwhelming. Here, too, young people in Switzerland are less than half as fearful as in the other countries.

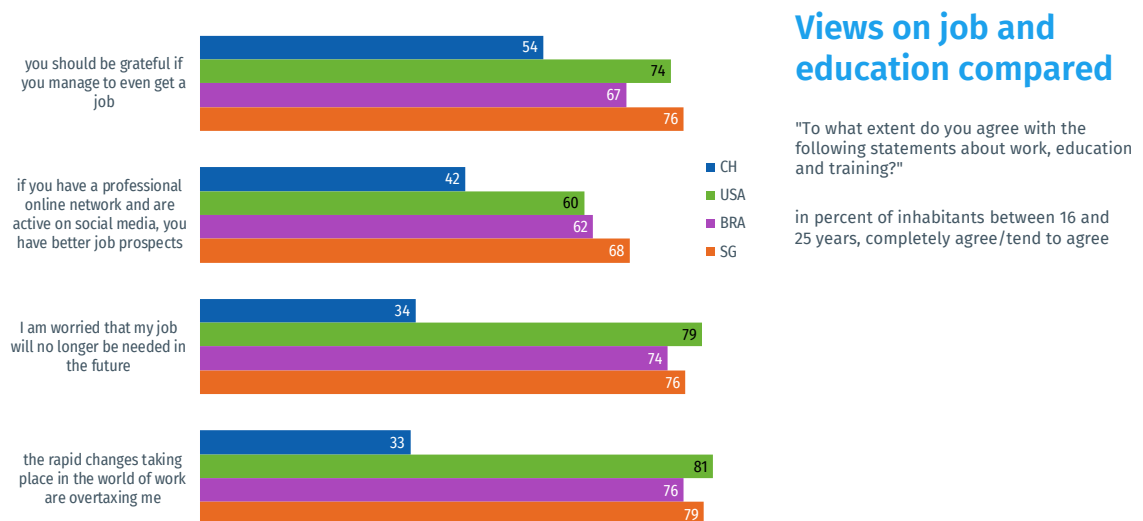
While a majority of young people in Switzerland also agree with the statement that they should be grateful even to have a job (54%), this proportion is much lower than in the other three countries. In addition, fewer young people in Switzerland share the view that digital networking and a presence on social media would be conducive to their own job opportunities.

The glaring differences in the way young people in Switzerland perceive the risks of digitization compared with those in other countries beg the question as to why this is the case. A key factor is probably the dual education system. Today, most young people in Switzerland still want to do an apprenticeship, and the apprenticeship market is primarily geared to the demand from companies for young talents. The openness of the Swiss education system also provides for lifelong learning and adaptation to changing requirements.

A further reason can certainly also be found in the career preferences of young people in Switzerland. Compared with other countries, 16 to 25-year-olds in Switzerland would prefer to work in sectors such as administration, education or the healthcare sector. Rapid job cuts in these sector are rather unlikely.

Finally, it is also the case that Switzerland – especially compared with Singapore, Brazil and the USA – has a close-knit safety net when it comes to social security, which ensures that the basic needs of all residents are covered.

Figure 26



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2.6.1 Characteristics of companies and Sustainable Development Goals

The United Nations (UN) Millennium Development Goals were followed in 2015 by a raft of Sustainable Development Goals (SDGs). These are aimed at securing sustainable development on the economic, social and ecological level for all countries. The SDGs not only have an impact on countries, but also serve as a reference for companies. As part of the CS Youth Barometer, the 16 to 25-year-olds were asked what aspects and characteristics of companies are weighted especially highly in terms of the SDGs. A discrete-choice approach was used for these questions. All respondents were presented with two fictitious companies each with five different characteristics – in an economic dimension, a social dimension, an environmental dimension, a critical dimension and in relation to the type of company. Within the various dimensions, one of three possible characteristics were randomly assigned. The respondents then had to select the company that suited them best. Viewed across the various dimensions, it is then possible to identify which characteristics in particular inform their choice of one company or the other. The comparison here is always made relative to a reference category (in each case the one shown first in the figure below). The analysis for Switzerland yields the following findings:

Economic dimension: If a company is primarily known for earning high profits on the stock market, this impacts less well on its rating than if the company is regarded as a reliable partner for its own customers. An association with the creation of new jobs has the most positive impact.

Social dimension: Being a good employer to the company's own employees is rated the most positive of all three characteristics queried. In second place (with a score three percent lower) come companies that are "committed to maintaining human rights in developing countries". Comparatively speaking, companies that pay high salaries and bonuses are the least valued.

Environmental dimension: Companies that invest in research and innovation of sustainable products are valued most by young people in Switzerland. This is seen as more positive than if the company's own premises are built in line with the latest environmental standards. Comparatively speaking, however, if a company instead donates part of its income each year to a climate fund, this has a negative impact on its rating (- 4 percent).

Type of company: The differences in the rating of companies according to their size and focus (national vs international) are not statistically significant.

Critical dimension: Companies can face public criticism for a wide variety of reasons. For young people, it is worst of all if a company is criticized by environmentalists. Comparatively speaking, if a company relocates functions to another country, its rating by young people is 4 percent higher. Accounting irregularities are seen as even less important.



Overall, therefore, the companies that go down especially well in Switzerland are medium-sized, Swiss-based firms that are well-known for creating new jobs, are regarded as good employers to their own staff and are seen to invest in research and innovation of sustainable products. Accounting irregularities are also the aspects most likely to be forgiven.

Figure 27



Discrete choice Switzerland

"You will see two companies that differ in various ways. Please select the company you like best."

Marginal impacts when it comes to the average (in %) if inhabitants between 16 and 25 years

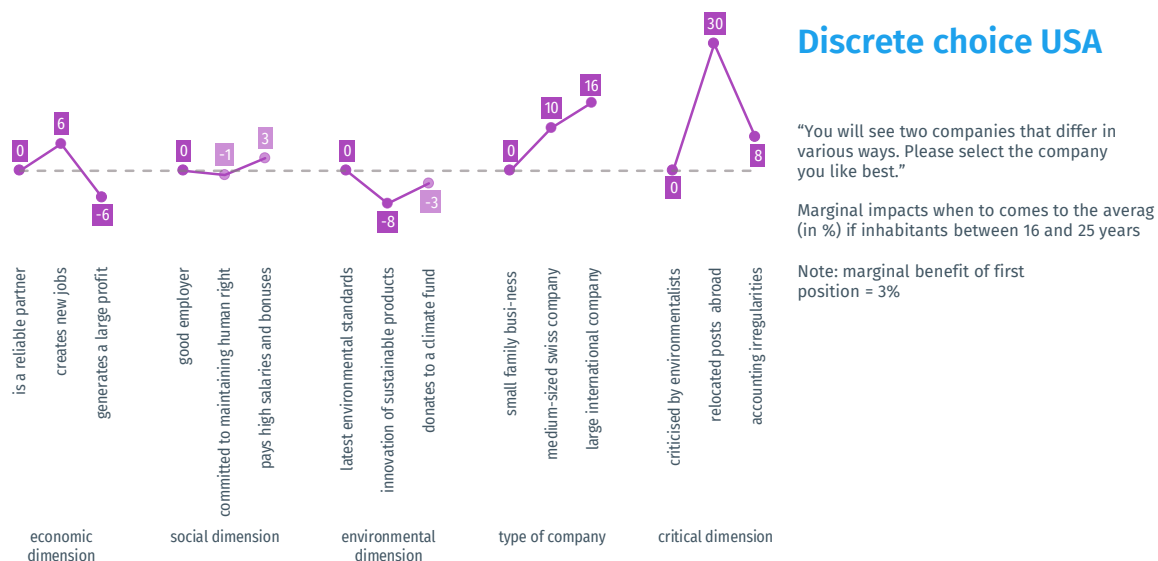
© gfs.bern, youth barometer, March-May 2018 (N = 1021)

Note for reader: Lightly shaded boxes indicate effects that are not statistically significant. By contrast, the darker boxes indicate significant – and hence interpretable – effects. Economic dimension: young people rank the benefit of a high dividend payout 8 percent lower than the benefit of a company that is seen as a reliable partner to its own customers (reference category).



Of the three aspects in the economic dimension, high profits are the least valued in the USA, as also in Switzerland. By comparison with Switzerland, however, the weighting for companies that pay high salaries and bonuses is more positive. This is also seen in the USA as more important than a reputation for being a good employer. A company whose premises are developed in line with the latest environmental standards is given a higher weighting than one that invests in sustainable products. Big international companies go down much better with young people here than medium-sized, US-based companies or small family businesses. Offshoring of functions is most likely to be forgiven.

Figure 28

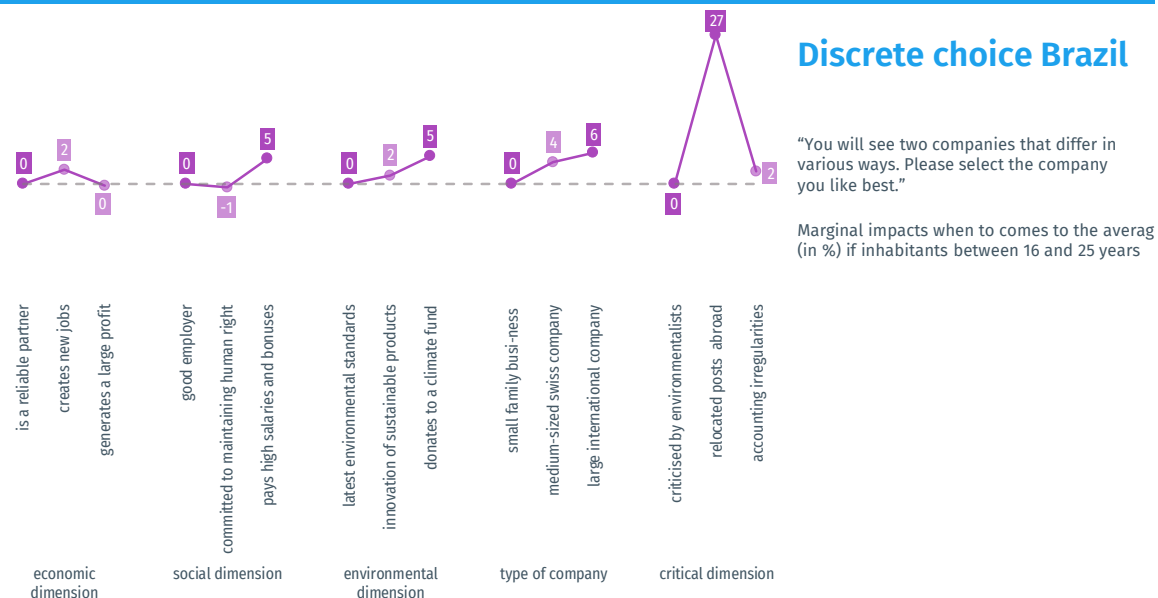


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In Brazil, the perception of the economic dimension is similar to that in Switzerland and the USA: the creation of jobs is seen as most important. As regards the social dimension, the critical dimension and also the type of company, the perception is similar to that in the USA. Paying high salaries and bonuses is given a positive weighting – big international companies are preferred, while the offshoring of jobs abroad is penalized.

Figure 29

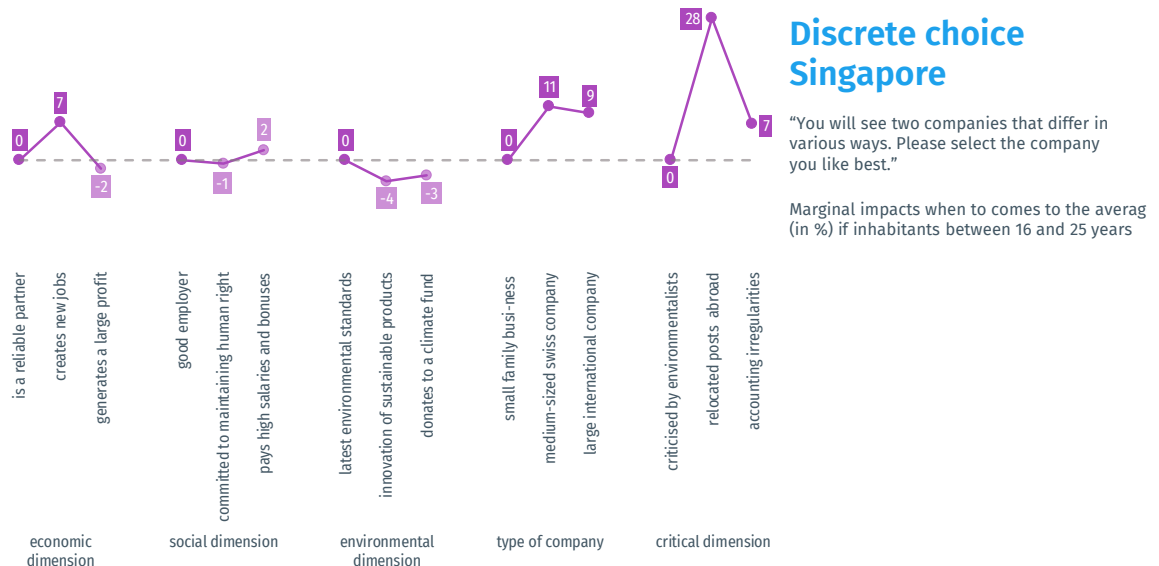


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The rating by young people in Singapore is very similar to that in the USA. The only difference is that medium-sized, nationally based companies are given slight preference over big, international companies.

Figure 30



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2.6.2 Sharing economy

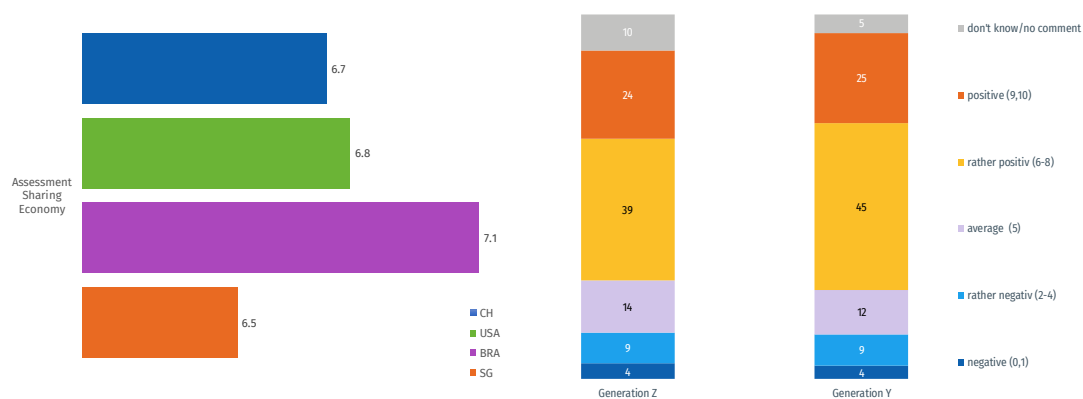
The value of sustainability and concern for the future are core topics for millennials. At the same time, these young people find themselves confronted with more difficult times economically. The model for economic security and social mobility no longer works for them as it did for their parents. As digital natives, they have also grown up in an extremely networked environment, which is a basic requirement for the working of today's sharing economy. In this sense, Generations Y and Z form the societal foundations for the rise of the sharing economy. Under the motto "use it rather than own it", the offerings of the sharing economy ideally meet the demands of millennials for flexibility. Most 16 to 25-year-olds in all four countries surveyed also value the sharing economy as something positive. This is especially true of Brazil, where it is assigned a score of 7.1 on a scale from 0 (negative) to 10 (positive).

Figure 31

Comparison - Assessment of sharing economy

"The services listed above are all part of the sharing economy. Sharing economy refers to the communal use of goods through sharing, swapping, lending, hiring or giving. The motto of the sharing economy is 'using instead of owning'. Would you rate the sharing economy as being more negative (0) or positive (10) for you personally?"

in % inhabitants, between 16 and 25 years



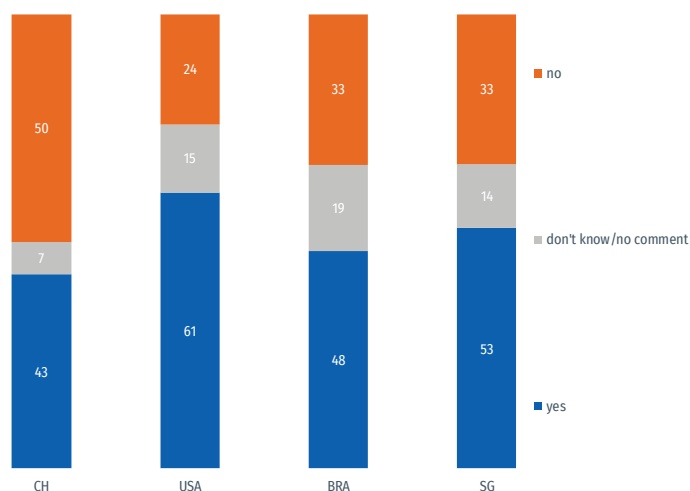
Substantial proportions of young people have already used offerings of the sharing economy themselves – namely, 61 percent in the USA, 48 percent in Brazil and 53 percent in Singapore. The use of such offerings is least widespread in Switzerland, where 43 percent say they have had experience of the sharing economy to date.

Figure 32

Comparison – Use of sharing economy

"The sharing economy operates in particular via internet platforms or apps which are used for swapping and sharing things with others or for the communal use of items. Examples include Airbnb, RelayRides and Sharoo. Have you personally used a sharing economy service via an internet platform or app?"

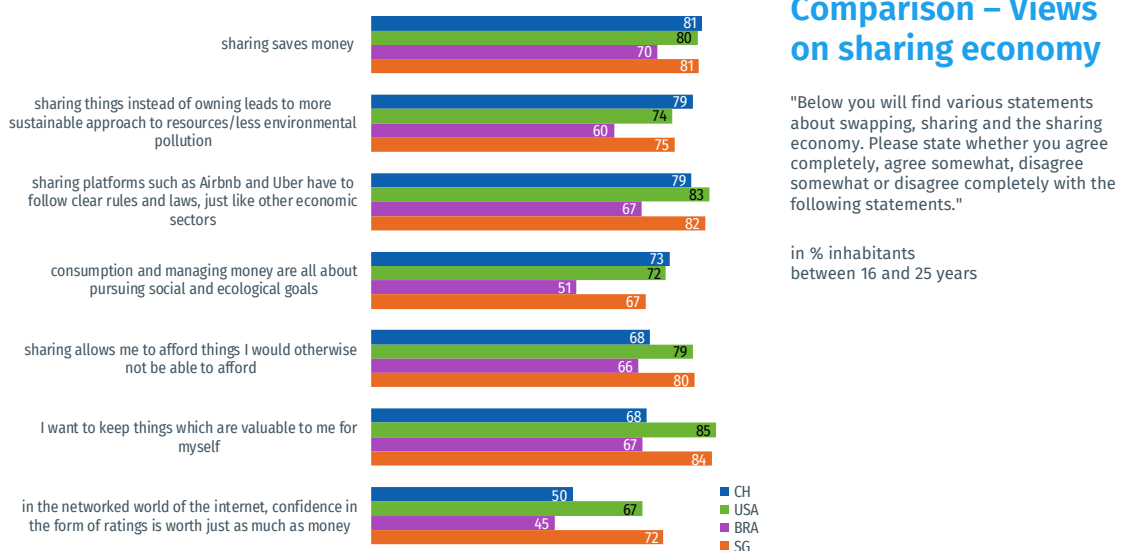
in % inhabitants between 16 and 25 years



There are both economic and ideological reasons why the sharing economy appeals to young people. On the one hand, most take the view that sharing saves money and that this enables them to afford things that would otherwise be out of their reach. On the other hand, they also underline the advantages of a more sustainable use of available

resources, as well as social and ecological objectives. Despite being fundamentally open to the sharing economy, the millennials also see certain limitations: sharing platforms should be regulated like other sectors of the economy – and people still want to have things they like and find of value for themselves.

Figure 33



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2.7 Media and communications

The media and communications behaviour of young people is especially interesting, because the lifestyle and dynamics of the last few years can be powerfully explained by the opportunities that come with smartphones, trendy apps and new forms of interaction. It is therefore no surprise that there are quite stark differences between Generation Y and Generation Z when it comes to the trendiest tools at present. In the case of Tinder as a dating platform, it has to be said that this enjoys less priority as yet among the current 16 to 18-year-olds (Generation Z), which also has to do with their life circumstances and interests.

Figure 34

Trends - Communications by generation

"We have put together a list of very different things in life. Please judge whether these things are 'in' or 'out' in your personal circles and also what your own opinion of them is."

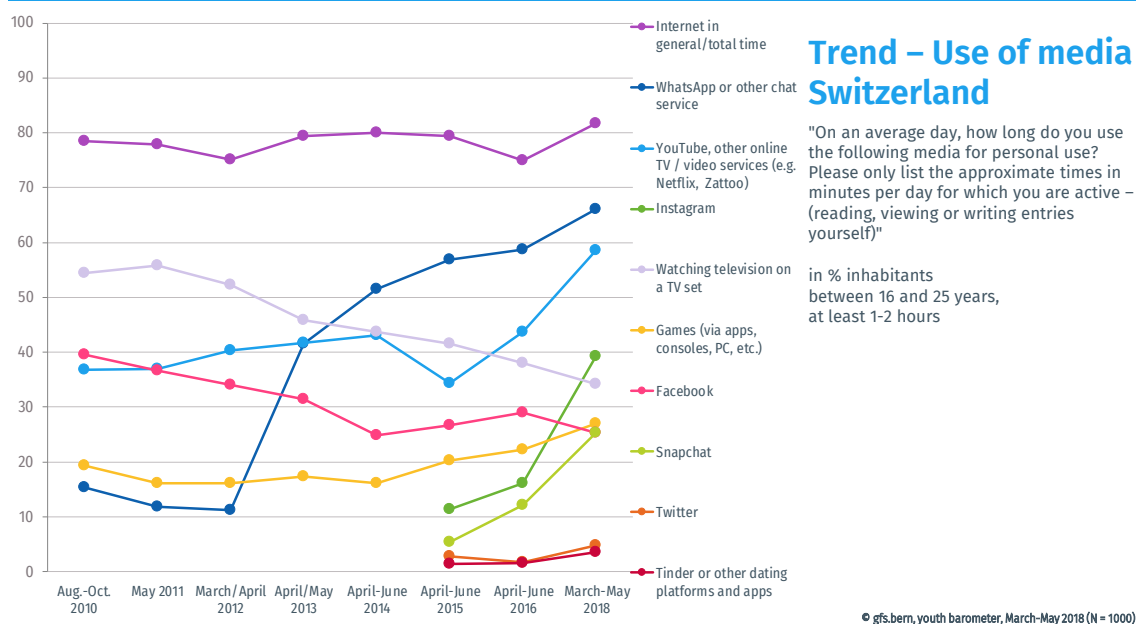
in % inhabitants, between 16 and 25 years, only apps where there are significant differences are listed



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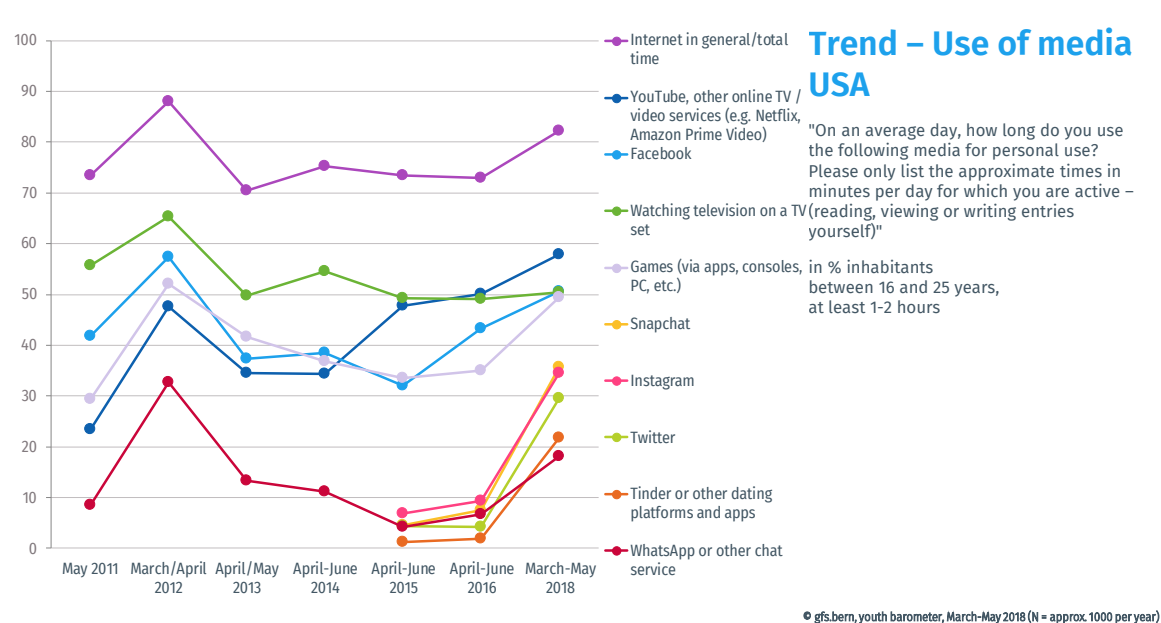
Indeed, a highly dynamic development is discernible in the use of various apps and tools. The proportion of young people who use WhatsApp, YouTube or Snapchat for at least 1-2 hours each day is markedly increasing. In Switzerland, on the other hand, TV consumption and use of Facebook are declining. Twitter remains a fringe phenomenon in Switzerland.

Figure 35



Highly dynamic developments are also discernible in the USA. Most new channels and the internet, however, show growing usage figures, and TV consumption is also not declining. Even Twitter is increasing sharply in the intensity of its usage.

Figure 36



The situation both in Singapore and in Brazil is similar (see next figure). The internet and all channels show increasing usage figures.

Figure 37

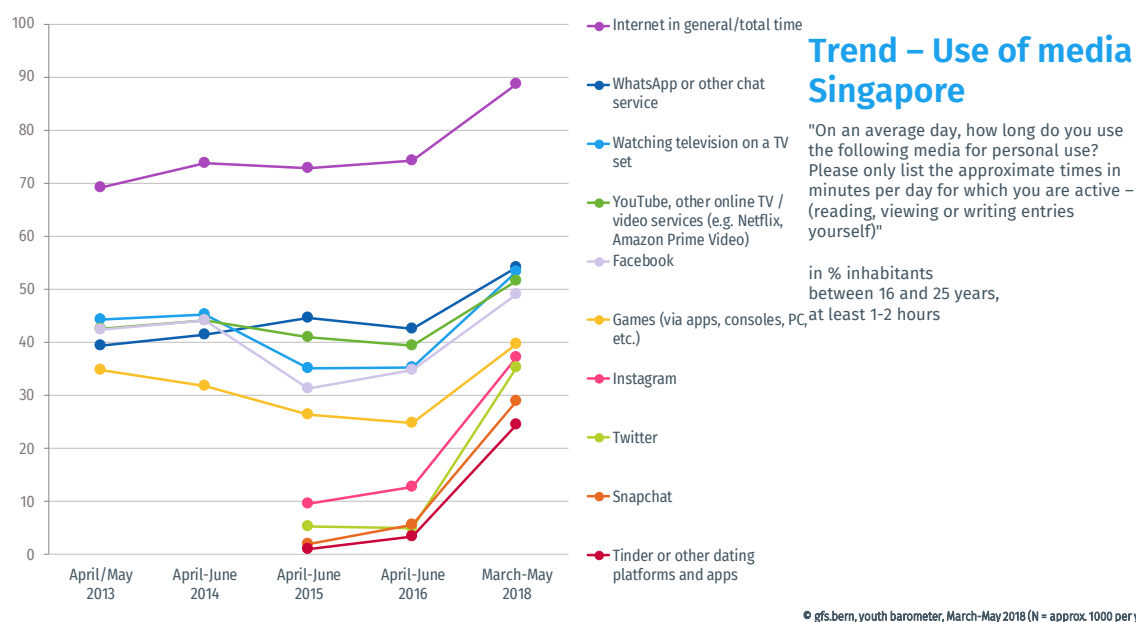
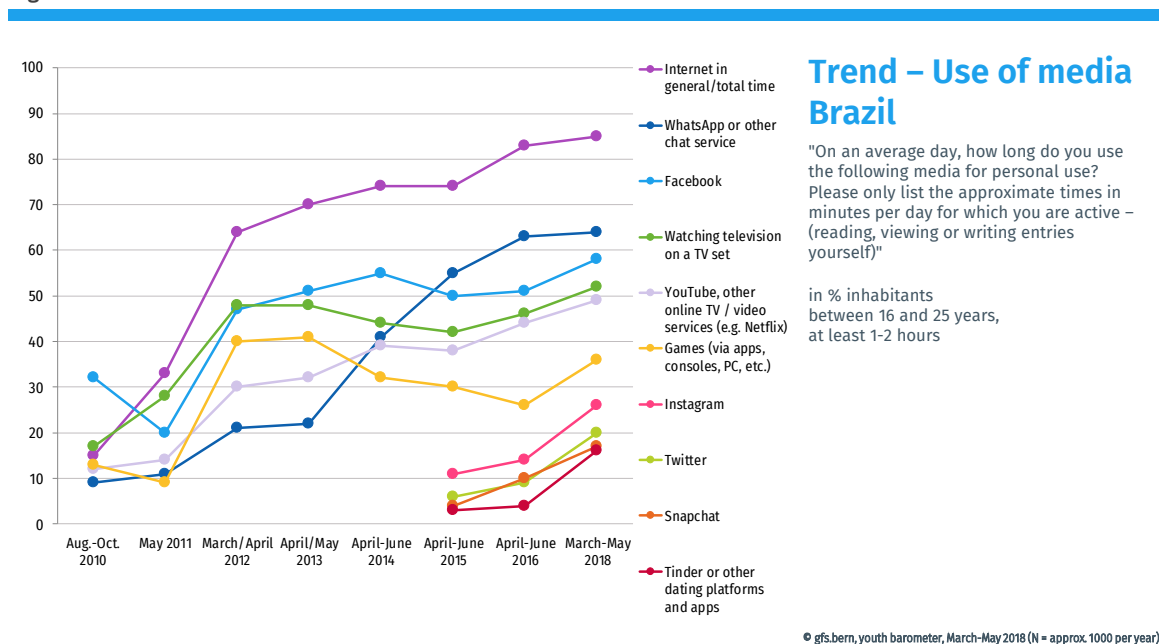


Figure 38

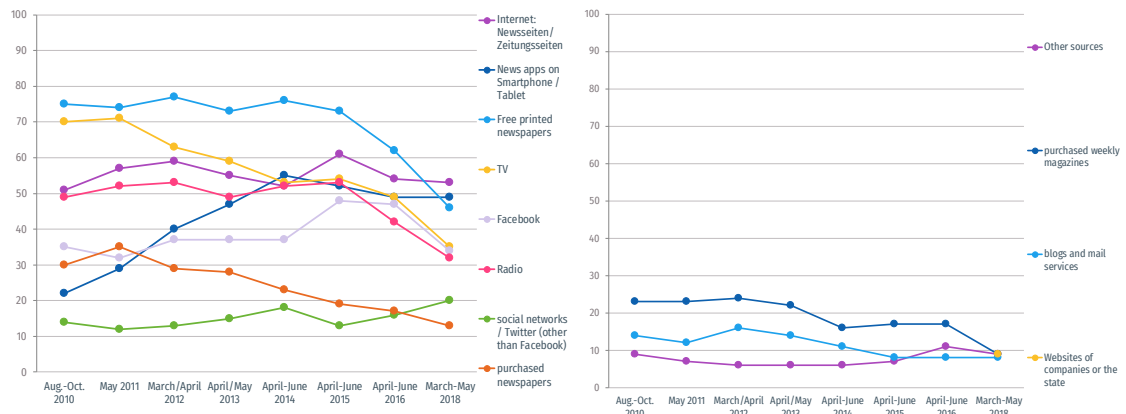


The actual consumption of news is only one aspect of the trends in media and communications behaviour. It is moving into the focus of interest in view of the accelerated transformation of the media. Quality newspapers also reach ever fewer readers in Switzerland, while news consumption is shifting in the direction of real-time news on a variety of news platforms.

Figure 39

Information source for daily events, Switzerland

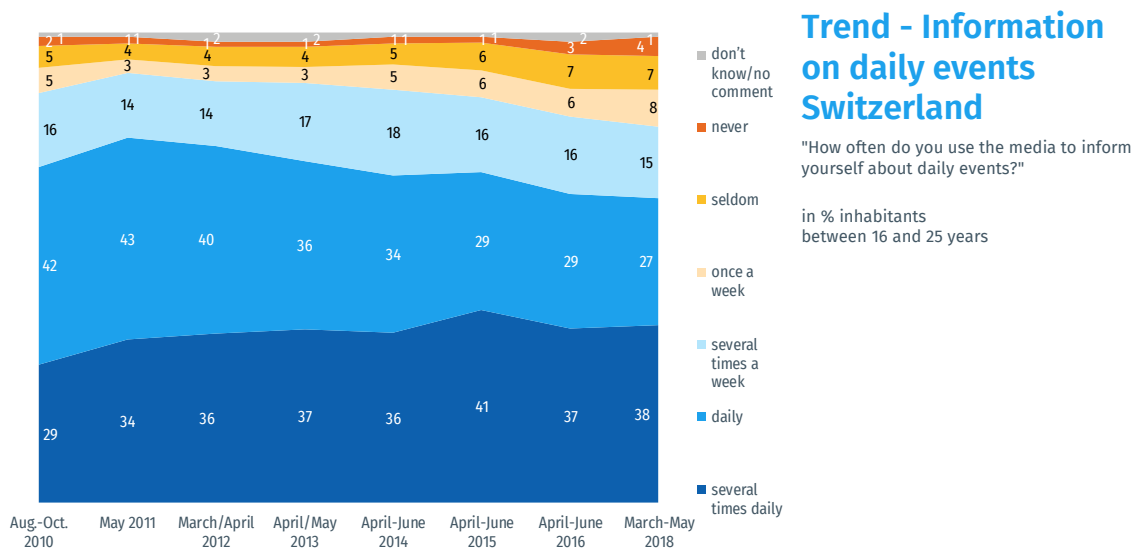
in % inhabitants, between 16 and 25 years



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This aspect is also discernible in the substantial increase over the years of young people who consume news several times a day. But this proportion has not shown any further increase for the last three years. We have been observing this trend for years. But now it is ever more apparent that the proportion of young people who rarely or very rarely consume news is growing. Today, it can be assumed that one out of five young people in Switzerland are excluded from the news flow.

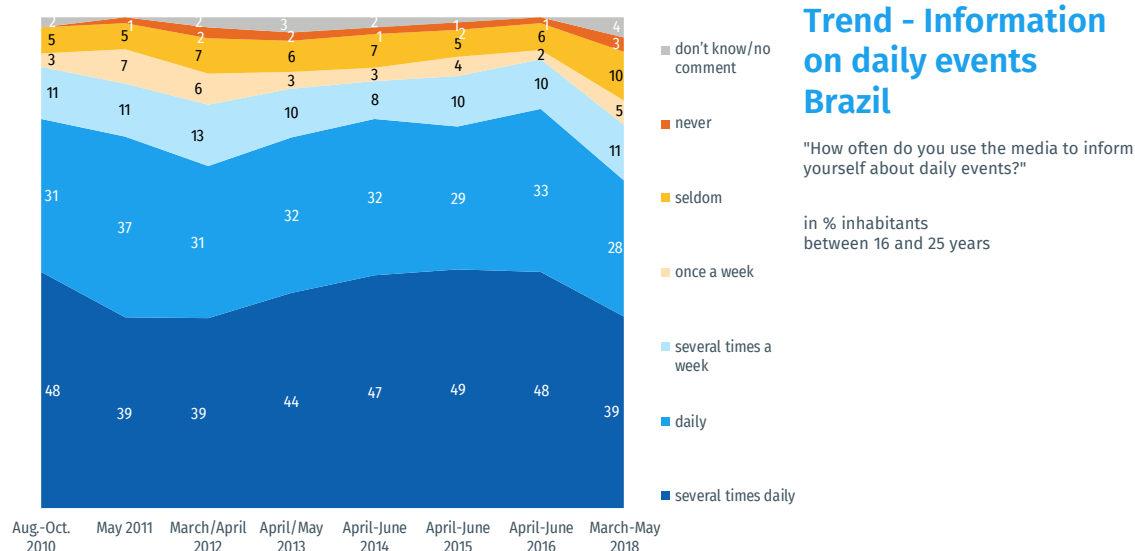
Figure 40



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The situation in Brazil is very similar. The increase in news avoiders has been marked since 2016. In Singapore and the USA, however, no corresponding increases have been noted.

Figure 41



Digitization not only impacts the way we consume news and how often, but also leads to the emergence of completely new issues. The digital spread of “fake news” is seen by substantial numbers of young people in all four countries surveyed as one of the five greatest problems in the country concerned. At the same time, 16 to 25-year-olds are likewise concerned with data protection on the internet. In Switzerland, 19 percent of young people are worried about cybersecurity.

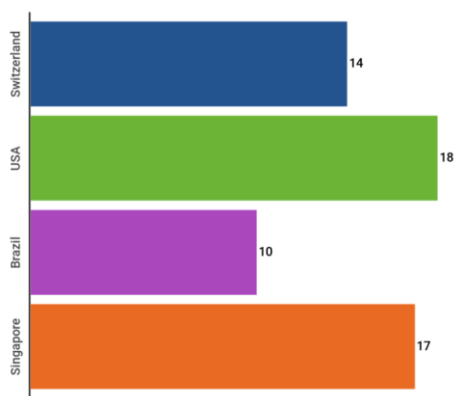
Figure 42

Greatest problems – Fake news / data privacy

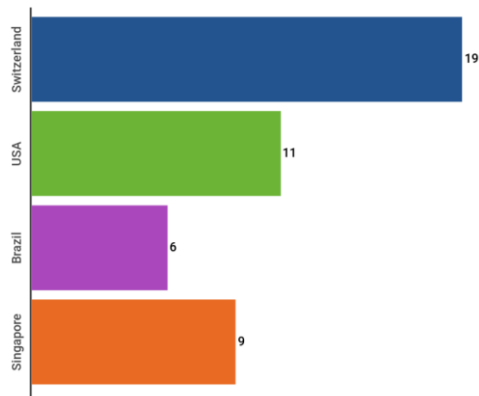
"In the list below you'll see several topics which have been discussed and written about a great deal recently. Read through the entire list and choose five points which you personally feel are Switzerland's / America's / Brazil's / Singapore's greatest problems."

in % inhabitants between 16 and 25 years who mentioned problems

Fake news



Data protection on internet

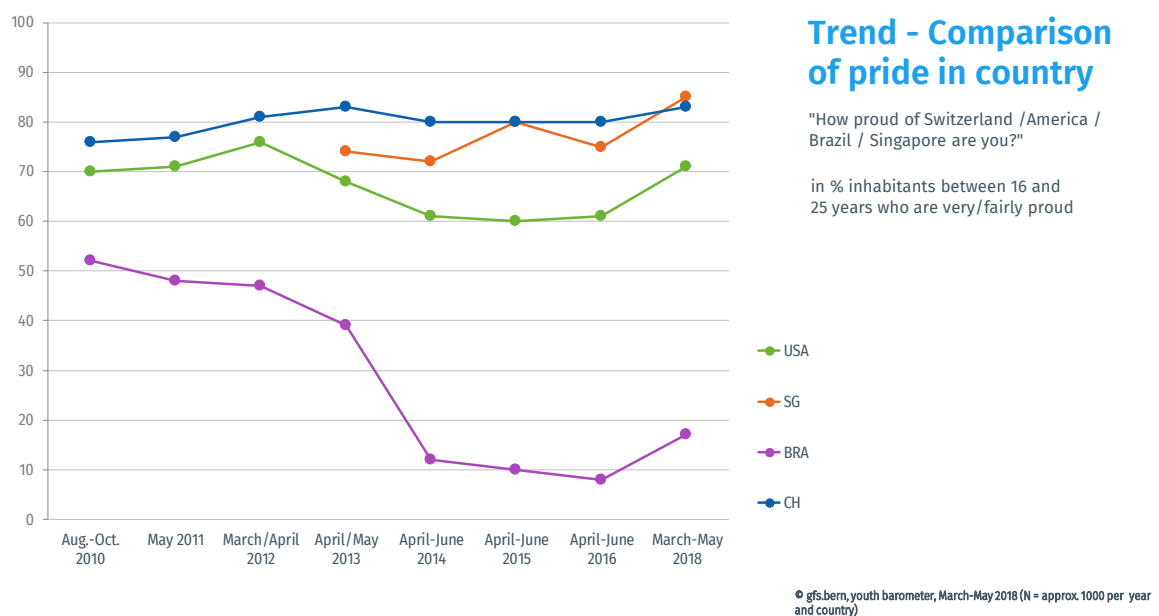


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2.8 Politics and problems

The 16 to 25-year-olds in Switzerland and Singapore are the proudest of their country. More than 80 percent say they are fairly proud or very proud. Although the USA has been the subject of extremely contentious debate in other countries since the election of Donald Trump as president, the identification of young people in the USA with their own country has increased since 2016, and more young people say they are proud of the United States than at any time since 2012. In Brazil, young people overall are very critical of their own country.

Figure 43



The lack of national pride in Brazil is clearly informed by a perceived failure of politics. In the years when young people especially had the feeling that government and administration were failing, the sense of pride was also extremely low and there was a strong feeling that reforms were needed. In the USA, the proportion of young people who accuse their own elites of failure is increasing. However, this increase already started before the election of Donald Trump and has not risen dramatically since 2016.

In Switzerland, the proportion of young people who take the view that politics is often failing has shown a relatively steady decline since 2010. Today, only just over 20 percent are of this opinion. Switzerland is also the country where young people see the least need for a reform of the political system in their country. In the other three countries surveyed, 80 percent or more of respondents share the view that their country is in need of fundamental reform.

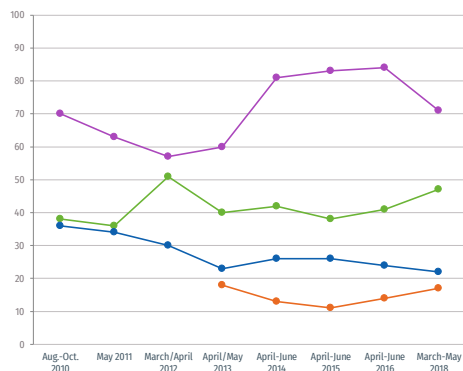
Figure 44

Failure of politics and need for reform

Failure of politics

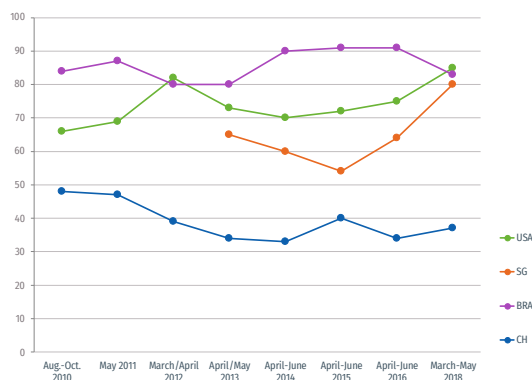
Do you feel that the politics of government and administration fail when it comes to important issues? Percentage "often"

in % inhabitants, between 16 and 25 years



Need for reform

Where do you stand on the statement "The political system of my country requires fundamental reform"? Percentage Agree entirely / Tend to agree



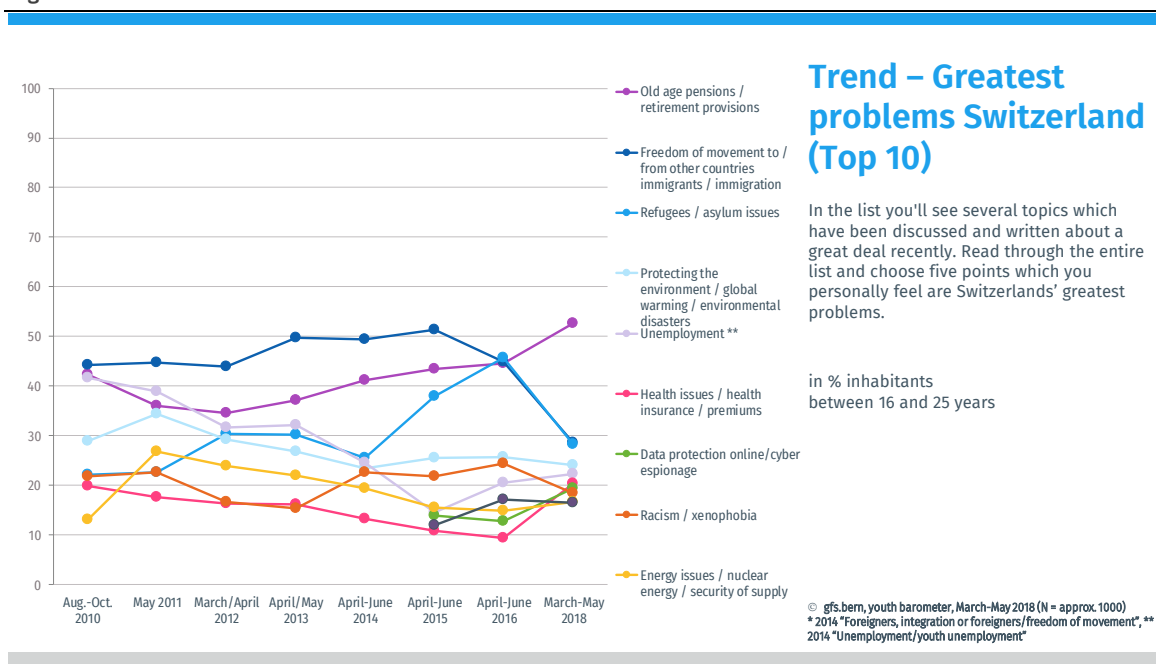
© gfs.bern, youth barometer, March-May 2018 (N = approx. 1000 per year and country)

Young people in the countries surveyed keep a close eye on political developments in their own country. This is apparent not only from their views on the failure of politics and the need for reform, but also their perception of problems.



In Switzerland, 16 to 25-year-olds regard **OLD-AGE PENSIONS AS THE GREATEST PROBLEM FOR THE FIRST TIME SINCE 2010**. After a steady increase in their perception of the problem since 2012, more than half of young people today see the uncertain future of the state pension scheme as one of the country's biggest problems. By contrast, issues concerning foreigners and refugees have become much less important in the eyes of the young since last year. Problems with regard to environmental protection and climate are ranked fourth in order of importance, followed closely by unemployment in fifth place. Compared with last year there has also been a substantial increase in the problem of pressure on healthcare systems (health issues / health insurers / premiums) as well as data privacy. The worries of young people in Switzerland thus also reflects to a certain extent the setting of topics on the national political agenda. The vote on the proposed reform of the pension system was one of the most important issues of the last 12 months and, with regard to the federal elections in 2019, is likely to play a key part in the debate around the healthcare system in Switzerland.

Figure 45



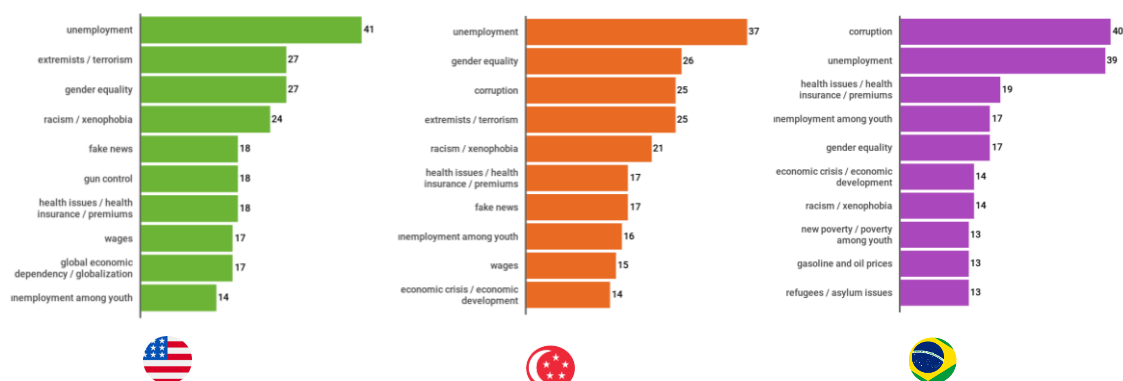
In none of the other three countries surveyed is the pension system an issue that concerns the 16 to 25-year-olds. Instead, it is economic considerations and, in particular, **UNEMPLOYMENT** that worries young people in the USA, Singapore and Brazil. **RACISM** is also considered one of the biggest problems by young people in all three countries. Worries likewise expressed in all three countries concern the **HEALTHCARE SYSTEM** and gender equality.



In addition, however, concerns are likewise voiced especially, in the USA and Brazil, about specific problems that also reflect societal flashpoints. For example, 18 percent of young people in the USA feel that **GUN CONTROL** is one of the five most burning issues. Exactly the same proportion see **FAKE NEWS** as a problem. In Brazil, however, **CORRUPTION** is the primary concern, and mention of **PETROL AND OIL PRICES** is a reference to the above-average prices that continue to be demanded by the partly state-owned company Petrobras. With the worsening situation in Venezuela, the **REFUGEE AND MIGRATION ISSUE** is also becoming critical in Brazil.

Figure 46

Top 10 concerns in other countries



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3 Synthesis

The millennials continue to be the digital generation. Trends and lifestyle are defined by smartphones and the internet with their opportunities for communications and entertainment. The findings of the Credit Suisse Youth Barometer to date have revealed a youth that has responded to the technological changes and trends with great openness and flexibility. Dramatic changes since 2011, for example, have seen the rise of the smartphone to become the absolute trend device with very high usage figures. The spread of the applications WhatsApp, Instagram, Snapchat and Tinder, as well as streaming services, has also been impressive. This contrasts with two other discernible trends: the waning importance of SMS and the looming decline of Facebook.

But the digital flexibility of a Generation “Digital” is only one side of the coin. The changes brought by the fourth industrial revolution are also a challenge and to some extent even a threat for young people: how their education is geared to the world of work is a crucial question at the end of their compulsory schooling. With the accelerated digitization of work, they face a lot of uncertainty when it comes to career choice.

The generation described as “digital natives” is admired for how smart they are in the way they can cope with their tools, gadgets and apps. But even millennials have only a rudimentary grasp of the changes to come with the digital revolution. While it creates opportunities for this generation, which is digitally adept per se, it also poses a threat and concern. This is clearly shown in the Credit Suisse Youth Barometer 2018.

To hang social changes within the group of millennials solely on the peg of digitization and thus ultimately on technology is nevertheless short of the mark. Aside from networking through technology, a new set of values is also emerging that leads in turn to the advance of new forms of organization and business. An example of this is the rise of the sharing economy. Sharing platforms fit with a Generation Y, for which not only

the latest trends are important, but very much also sustainability and genuine, communal solidarity in the long term. A formative element of the phase between childhood and adulthood is the peer group, the sharing of ideas and experiences with people of their own age. It is in these groups that trends are lived and established, new values formed and thus long-term orientation shaped. In the current phase of uncertainty and with the continuing rise of individualization, the peer group appears even more crucial. By contrast, other established institutions, media brands and structures fade into the background. In this context, systematic participation in politics, society and the economy does not seem very worthwhile. Not only political parties, but also clubs are out. And establishing one's own company is becoming more attractive outside Switzerland. This change is increasingly becoming a challenge for cohesion beyond the peer group, joined together in atomized WhatsApp groups, for the stability of various sub-systems through to the political system as a whole.

We summarize the findings on the 2018 youth barometer in the form of the following hypotheses:

DESPITE DIGITAL
LIFESTYLE, THE
CHANGES THAT
COME WITH
TECHNOLOGY
CREATE
UNCERTAINTY

While digital trends shape youth lifestyle, the digital revolution and the impact on jobs and future prospects also create uncertainty when it comes to the key question of career orientation. In Switzerland, the dual education system with established integration processes creates a certainty that is often lacking in other countries.

WHATSAPP
KILLS THE
MEDIA STREAM

For the real-time generation, WhatsApp is currently the sharing channel *par excellence*. The news supplied by one's own peers is more important than other news. Ever greater sections of youth are cut off from news streams. Neither classical nor new media channels fill this gap for those "deprived of news".

PARTICIPATION
ONLY OUTSIDE
ESTABLISHED
STRUCTURES

Individualization also remains a social megatrend among millennials. The digital and fluid networking opportunities available are more attractive than established, institutionalized structures. Participation in these structures is becoming increasingly less attractive. Spontaneous waves of protest, situative projects, groups without structures and working for oneself without any employment contract are more interesting than political parties, clubs or corporations.

SHARING AND
CARING

Young people are thinking about critical developments and, depending on the country concerned, are worried about fake news, corruption, armed violence or old-age pensions. A unifying element is the wish for sustainability in thinking and actions and always being guided by human closeness and family. Factors that fit with the values of millennials are not only the ideas of the sharing economy, but also the current growing solidarity with foreigners and, at least as young people see it, the absolutely intact solidarity between the generations.

4 Appendix

4.1 Composition Big 5 Indices





Table according to Freitag (2017)⁴




Table 2: Personality traits of the Big 5 indices and their measurement in Switzerland

Personality trait	"Here are a few statements. Please indicate how much you agree with each statement or not on a scale of 0 to 10, where 0 = you do not agree at all and 10 = you strongly agree. I am someone who..."
Agreeability	is sometimes a little rude to others. (-) can forgive. is considerate and amicable towards others.
Conscientiousness	is thorough in my work. completes tasks effectively and efficiently. tends to be rather lazy. (-)
Openness	is original and comes up with new ideas. appreciates artistic experiences. has a lot of imagination.
Extraversion	can come out of myself and is sociable. is reticent. (-) is considerate and amicable towards others.
Neuroticism	is relaxed and can cope well with stress. (-) is often worried. gets easily nervous.

⁴ Freitag, Markus (2017): Die Psyche des Politischen. NZZ Libro.

4.2 gfs.bern-Team

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