



UB NORDIC

2019/2020

THE NORDIC YOUTH BAROMETER

What is it like to be a young person in the Nordic countries in 2020? Is there such a thing as Nordic youth? What are the differences between Gen Z in Finland, Denmark, Sweden, and Norway with regards to attitudes and values?

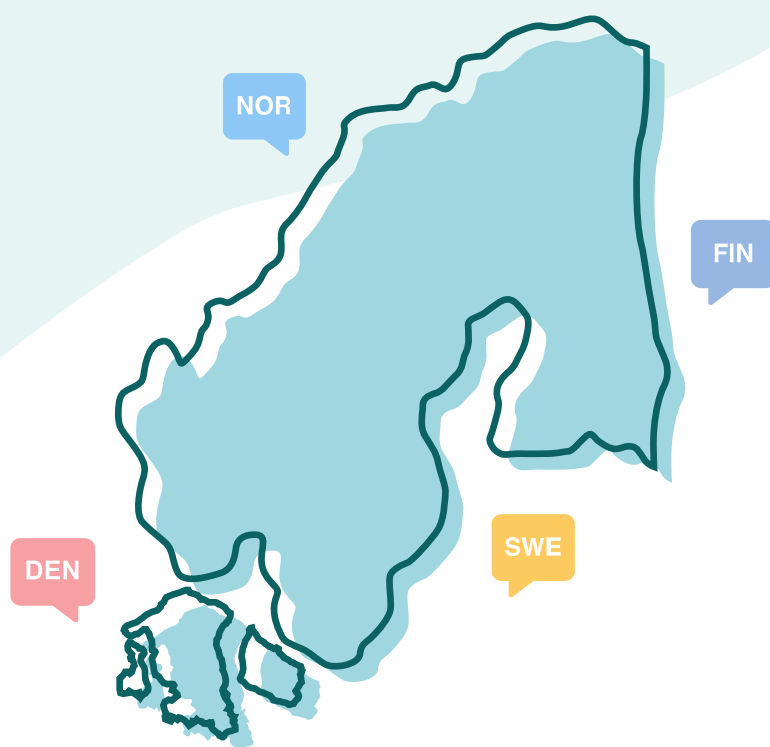
At Ungdomsbarometern, "The Youth Barometer", we have studied Swedish youths' attitudes, beliefs, and actions since 1991. Now, 30 years later and in collaboration with Norstat, we have created our first public Nordic report. In these strange times, with strained relationships between the Nordic countries, perhaps a report of this kind is exactly what is needed.

Overall, the report finds that the Nordic youth population is a rather homogenous one vis-à-vis how they see their lives and the world. That is an important finding - regardless if you are a marketer, a politician or just generally interested.

Given that the similarities between the countries are so big, the data presented in this report will be in total for all the Nordic countries combined. Where countries differ - or if there is noteworthy data for a specific country - it will be presented in separate graphs or the text. With that said, pay attention to the color we have assigned to the respective country (see below)

Important to note, the data for this report was collected earlier this year, before the eruption of COVID-19. However, since the focus of this report is to study attitudes, values, and beliefs, which tends to change slower than behaviors, this can be seen as an advantage, given that a field period during a pandemic might be tricky to interpret.

Welcome to UB Nordic 2020!



ABOUT UNGDOMSBAROMETERN:

Ungdomsbarometern (The Youth Barometer) is Sweden's leading youth focused insight and research agency, specialized in areas affected by the minds and actions of 15-24 year olds. We have been studying values, attitudes and behaviors of the Swedish youth since 1991, which provides us a knowledge base few can match. By using advanced technology and analysis tools Ungdomsbarometern provide clients with valuable insights to a, otherwise, hard to reach market.

ABOUT NORSTAT:

Norstat is a market research company using well-grounded research methods to collect reliable data about any desired topic or target group. The research is not confined to a specific method of data collection – rather, whatever works best: scientifically proven, fair to the respondents and sustainable for the industry.

Norstat provides services in 18 markets and has offices in 12 European countries. The proprietary online panels allow you to conduct interviews with over 650,000 consumers all across Europe. Norstat Sverige AB is a part of Norstat Group, which forms one of the leading data collection providers in Europe. In Sweden, we are covering all fieldwork methods: telephone interviews, face to face personal interviews, online panel, omnibus solutions, mystery shopping, recruitment of participants for focus groups, UX tests and other qualitative research, and rental of focus group facilities.

FACTS ABOUT THIS SURVEY

Interview method: Surveys

Target group: Youths in Sweden, Norway, Finland and Denmark in the ages 15-24

Field period: Sweden: 3-29 October 2019
Norge, Finland och Danmark: 15 Jan-4 Feb 2020

Interviews/country: Sverige - 18 959
Norge - 514
Finland - 507
Danmark - 502

EDITORIAL:

Publisher: Ungdomsbarometern and Norstat

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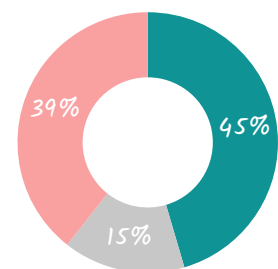
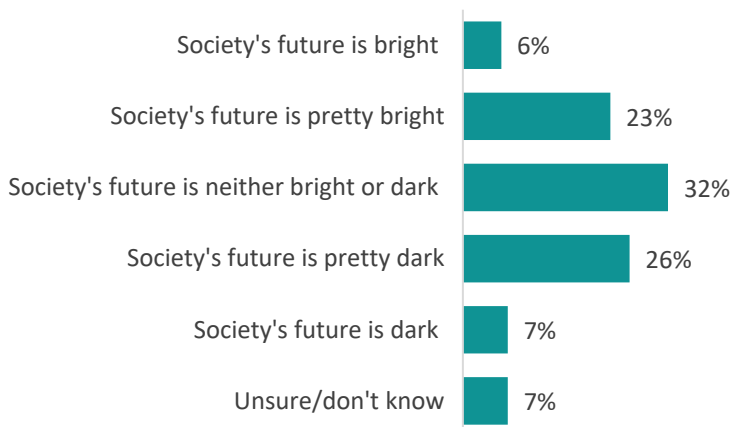
NORDIC YOUTH HAVE A GRIM VIEW OF SOCIETY'S FUTURE

Nordic youths' perception of the future is a rather dark one. In Sweden, we have seen this developing for quite some time now, and it seems as if the same grim perceptions of society's future can be found in the other Nordic countries as well. An easy way to illustrate these grim perceptions is by demonstrating how Nordic youth see their own generation's future. The idea of perpetual progress – that each generation will be better off than the previous one – is an idea that many Nordic youth have a hard time believing today.

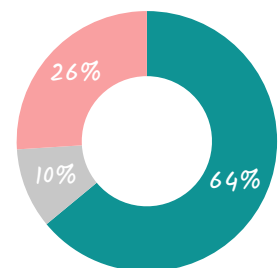
Given the climate crisis, and the fact that it is harder for this generation to enter both the housing market and the job market today than it was for this generation's parents, it is perhaps not so surprising that youth hold this view. With that said, one in four Nordic youth is doubtful that society would be able to take care of them if they would get sick or become unemployed. In comparison with the other Nordic countries, Swedish youth report the lowest level of trust in the social system, and it is perhaps as a result of that, we have seen an increase in retirement savings among Swedish youth in the last couple of years.

With that said, a majority of Nordic youth still report a high level of trust in their society's social safety net and, it would be fair to say that it is a good thing that young people save for their retirement.

THE PERCEPTION OF SOCIETY'S FUTURE:



My generation will be better off than the previous ones



Society will be able to take care of me if I get sick, become unemployed, or retire.

■ Agree ■ Unsure/don't know
■ Disagree

SWE

In Sweden, only half of all youth believe that society will be able to take care of them.

A BRIGHTER VIEW OF THEIR OWN FUTURE

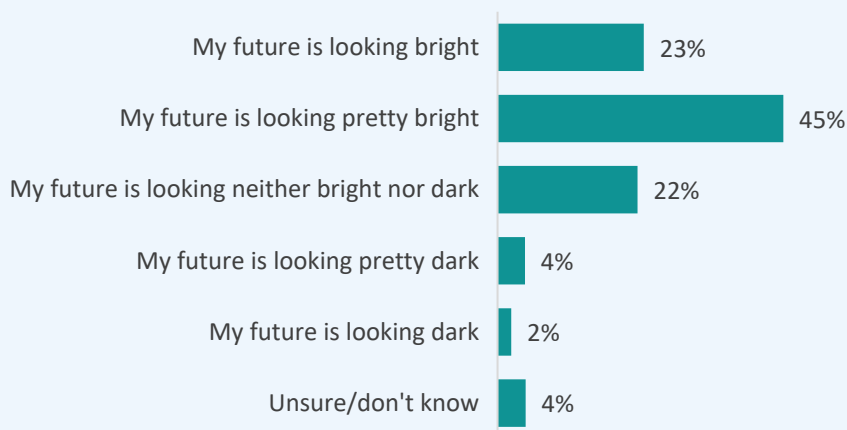
The grim view of society's future and the perceived feeling of growing up in a world that is not heading in the right direction naturally affects this young generation. But in contrast with the perception of society's future, Nordic youth have a positive outlook with regards to their own. This more positive outlook is – at least in part – a result of young people's conviction that they are agents of their personal future. This perceived agency is a double-edged sword, and it also has its downside.

A large portion of this Nordic youth generation, report high levels of stress, anxiety, and mental health problems. The most contributing factor, according to themselves, is the expectations that they placed upon themselves (48%). In addition to high expectations, approximately one in three (37%) report that they feel stressed by their body image and appearance, and about one in three also feel worried about their economic situation.

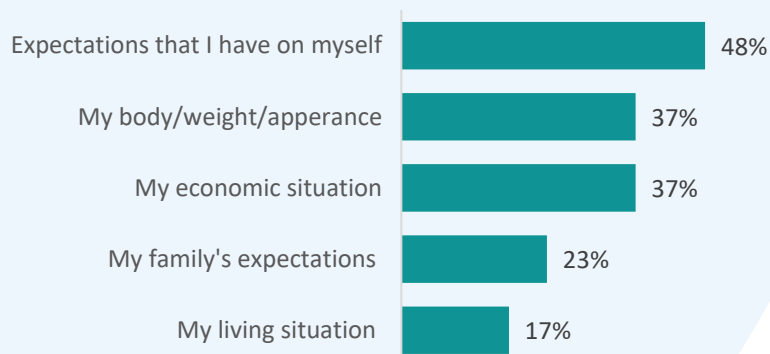


Nordic youth view their future in a positive light, but high expectations on themselves are stressful.

NORDIC YOUTH'S PERCEPTION OF THEIR OWN FUTURE:



YOUNG PEOPLE FEEL VERY STRESSED ABOUT THE HIGH EXPECTATIONS THEY HAVE PLACED UPON THEMSELVES...



FIN

Finnish youth feel more stressed about their economic situation than youth in the other countries.

ENVIRONMENTAL AND CIVIC ENGAGEMENT

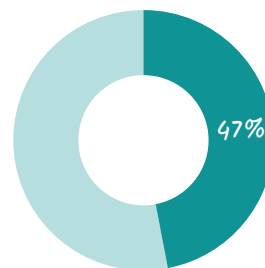
As Greta Thunberg's Fridays for Future grew and became an international climate movement, young people's interest in environmental- and climate issues became much clearer. In the Nordic, about half of youth report that they have a *major* interest in environmental- and climate change issues, and one-third of youth report that they have a *major* interest in politics and societal development.

The interest in environmental- and climate change issues, and the interest in politics and societal development, elucidates the fore-mentioned willingness to influence society and create change, on both a micro- and macro level. For example, one out of six believes it is *crucial* to be able to influence society's development in their future workplace.

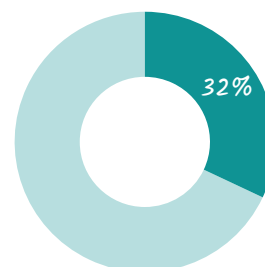
The trend, if we look at the development in Sweden, is that the interest in environmental- and climate issues and politics and societal development has been steadily growing, it hasn't dropped during the pandemic according to our research.



1 in 6 believe that they must have the opportunity to influence society's development in/through their future workplace.



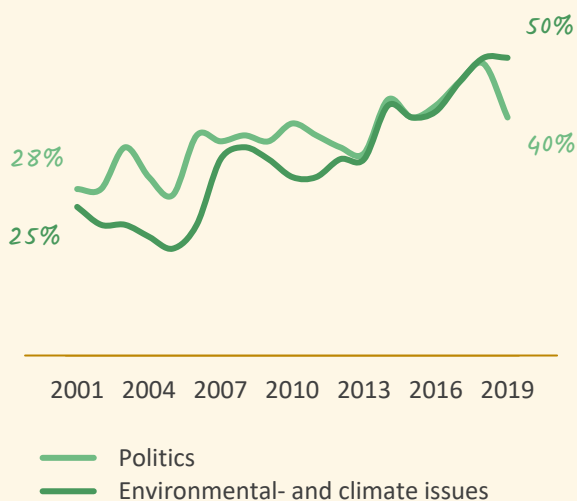
A large interest in environmental- and climate change issues. (4 or 5 on a five-point scale)



A large interest in domestic-/international politics and societal development. (4 or 5 on a five-point scale)

SWE

The interest in politics and environmental issues has been steadily growing among Swedish youth:



A CAREER-ORIENTED, NO-PARTY GENERATION

As outlined earlier, Nordic youth are positive about their future, but they also feel stressed about doing their part to create the future they envision for themselves and the world.

By looking at how important education is for today's youth, it is rather clear that this is a responsible generation. To build a career (72%) and studying (70%) tops the list of Nordic youths' interest and the interest in partying only comes out in tenth place (48%).



This generation thinks it is much more important to study and make a career than partying.

DEN

Danish youth report a much higher interest in partying than youth in Sweden, Finland and Norway.

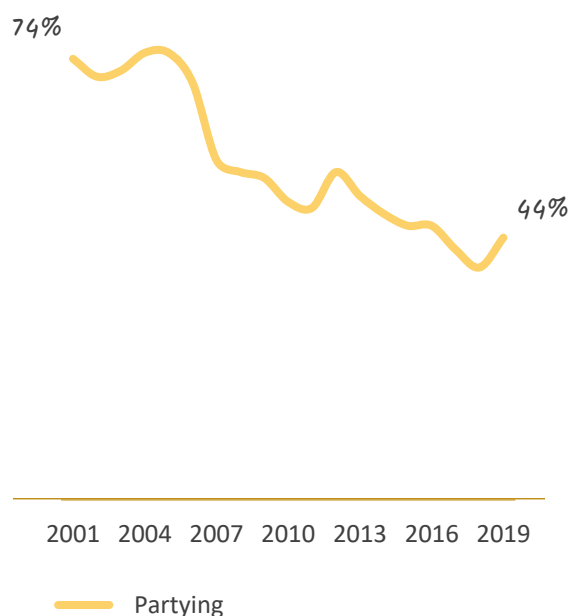
HOW INTERESTED ARE YOU IN THE FOLLOWING?

(4 or 5 on a five-point scale illustrated below)

1.	Build a career (72%)
2.	Studying (79%)
3.	Other countries and cultures (65%)
4.	Trying out new products and activities (63%)
5.	Meeting new people (61%)
6.	Working out (60%)
7.	Cooking/inviting people for dinner (59%)
8.	Fashion/clothes (55%)
9.	Science and technology (49%)
10.	Partying (48%)

SWE

Swedish youths' interest in partying have been steadily declining. However, we do see a surge in the interest from 2018 and onwards. Is this a potential shift?





SWE

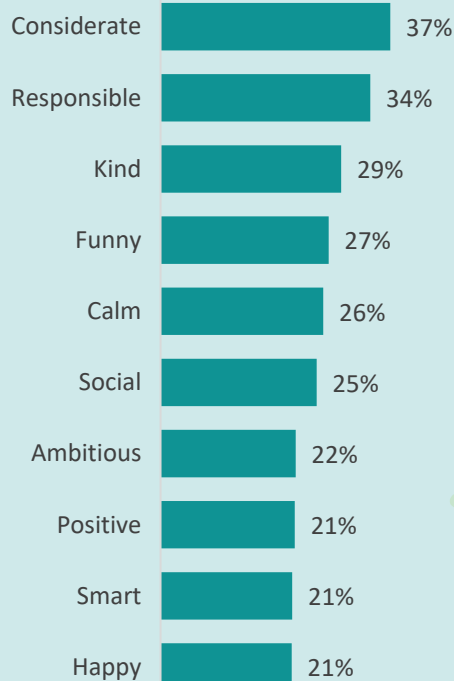
“Online parties, where you do not even have to be in the same room to listen to music or party - one will interact through the phone or a flat-screen instead. I’m saying this because it feels as if youth are not outside as much as before, and you can make friends online – even friends from other countries. In this way, everyone can hang out live without needing to meet physically.”

- Girl, 24 years old in Sweden,
about the biggest trend in 2020

SELF IMAGE: CONSIDERATE AND RESPONSIBLE



WHAT/WHICH OF THE FOLLOWING CHARACTERISTICS DESCRIBES YOU BEST?



Top 3 characteristics, Nordic total:

1. Considerate
2. Responsible
3. Kind

DEN

Danish youth describe themselves as less smart and kind, but happier and funnier, than youth in the other Nordic countries.



TOP 5 CHARACTERISTICS,

SWEDISH YOUTH:

1. Considerate
2. Kind
3. Ambitious
4. Calm
5. Social

DANISH YOUTH:

1. Responsible
2. Considerate
3. Funny
4. Happy
5. Social

NORWEGIAN YOUTH:

1. Considerate
2. Responsible
3. Kind
4. Smart
5. Calm

FINNISH YOUTH:

1. Calm
2. Considerate
3. Responsible
4. Social
5. Funny

FRIENDS, EDUCATION AND CAREER IN FOCUS

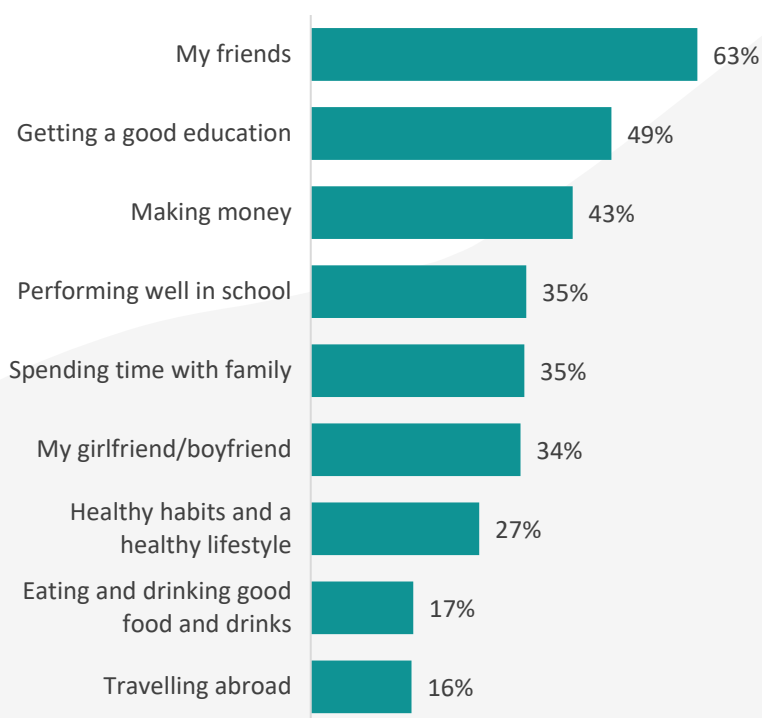
We have already established that Nordic youth are more interested in school and their careers than partying. These interests also lines up well with their priorities. For about half of Nordic youth, the most important in life right now is to get a good education.

While getting a good education is a priority that has been growing over the years, partying is something that has become less and less important – at least for Swedish youth. Having said that, the decrease in partying among youth does not mean that social interaction has lost its importance. The most important thing in Nordic youths' lives right now is their friends.



About half of all Nordic youth believes that getting a good education is the most important in life right now.

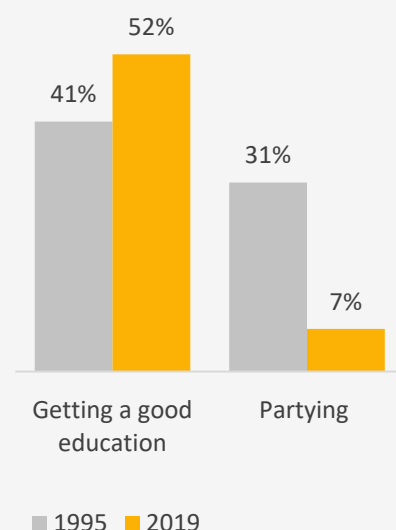
WHAT IS THE MOST IMPORTANT IN YOUR LIFE RIGHT NOW?



SWE

What is the most important in your life right now?

The development in Sweden between 1995-2019:

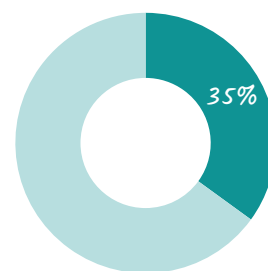


FAMILY – A PRIORITY FOR NORDIC YOUTH

To hang out with family – something which has increased in importance among Swedish youth over the last couple of years – is also seen as important on a Nordic level. Given that we have a youth generation that is spending more time at home with their parents and siblings, it could potentially create a new dynamic in the Nordic families.

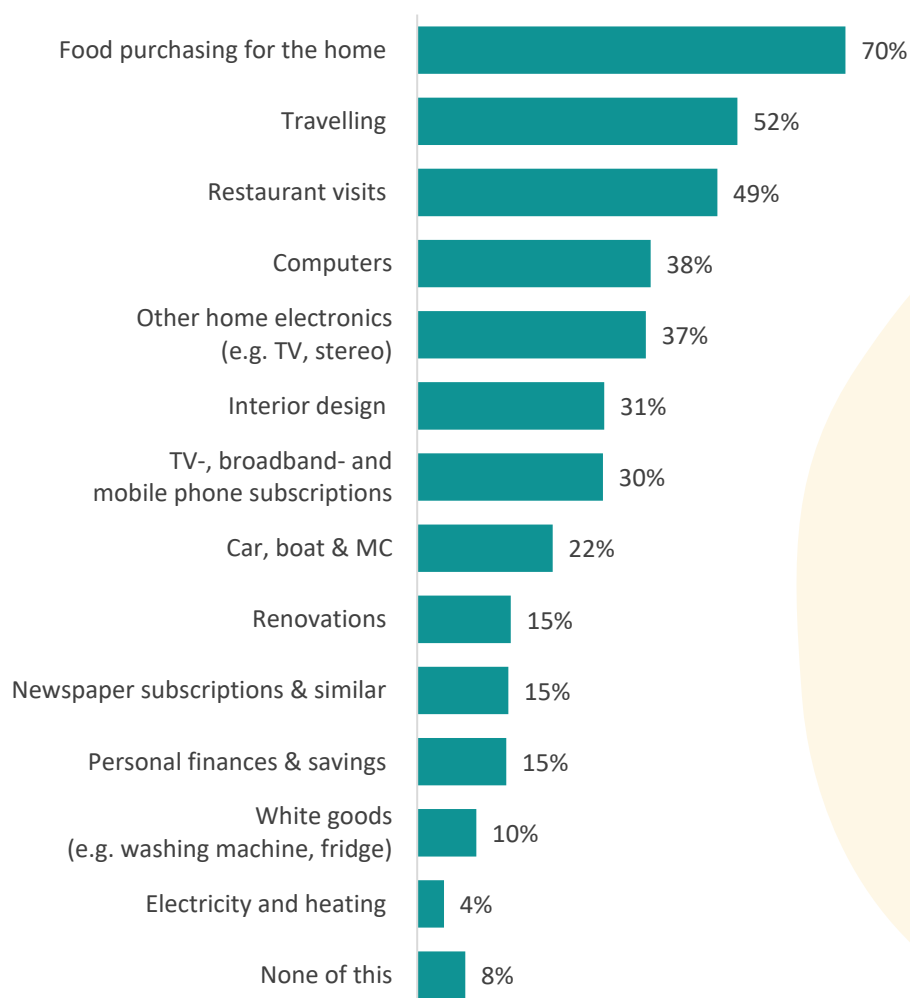
It also seems as if a change of power has taken place in many homes. At least Nordic youth perceive it as such, given that about nine in ten reports that they are taking part in the decision making on what to buy for and to the home – especially what food should be bought, what restaurants the family should go to and where the family should travel.

Did you think that it was enough to let the kids decide what dinner they want for their birthday? Not anymore.



1 in 3 believes that spending time with family is one of the most important things in life

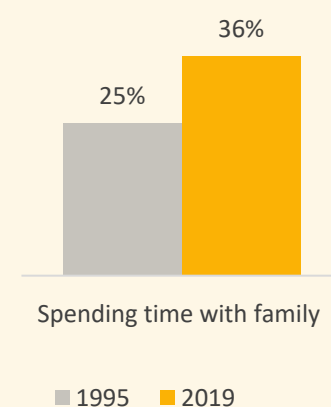
WHAT PURCHASING DECISIONS DO YOUTH INFLUENCE AT HOME?



SWE

What is most important for you right now?

The development in Sweden between 1995-2019:



AN INTERESTING, SOCIAL AND BALANCED WORK-LIFE

This report has already established that Nordic youth care a lot about their careers. However, we are yet to cover what young people in the Nordic expect and need from their future work in order to prosper.

The most crucial factor for Nordic youth when they are entering work-life and decide what career to go for, is that they can work with something that truly interests them. It is not only the number one factor right now; it has been the primary factor for many years – at least in Sweden. In addition to that, a social community at work, a healthy work-life balance, and strong leadership are also crucial factors.

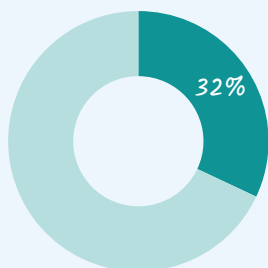
Even though some of the factors shift a little bit between countries, it seems as if the overarching picture of attitudes to and expectations on work-life is similar.



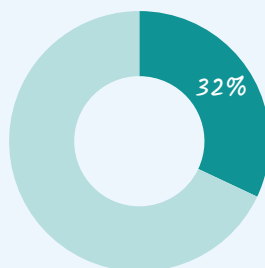
Top 3: Which of the following is crucial for youth in their future work/workplace?

1. That I'm able to work with something that I'm truly interested in.
2. Fun colleagues/good social culture in the workplace.
3. Good work-life balance

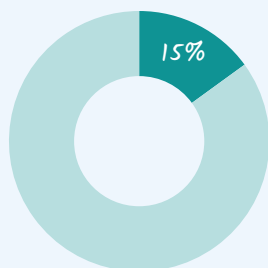
WHICH OF THE FOLLOWING IS CRUCIAL FOR YOUTH IN THEIR FUTURE WORK/WORKPLACE?



That I get appreciation for my work



That the workplace is gender equal.



That the business/organization has an environmentally friendly/sustainable agenda.

FIN

Environmental issues are not as essential for Finnish youth as they are for youth in the other Nordic countries.



THE FLEXIBILITY AND SECURITY-PARADOX

Nordic youth want an interesting, social, and balanced work-life. Within the preference of a balanced work-life lies an interesting paradox between flexibility and security; youth want security, but they also want flexibility. Simply put, they want a permanent contract, with a fixed salary and flexible working hours.

IF YOU HAD TO CHOOSE BETWEEN THE FOLLOWING WORKING CONDITIONS – WHAT WOULD YOU CHOOSE?

35%

... prefer a stable/traditional industry over a fast-moving/expansive industry

70%

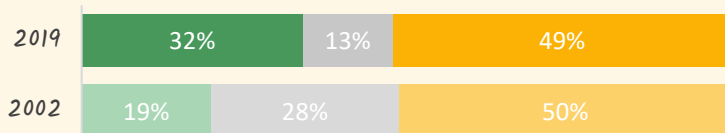
... prefer a fixed salary over a performance-based salary

51%

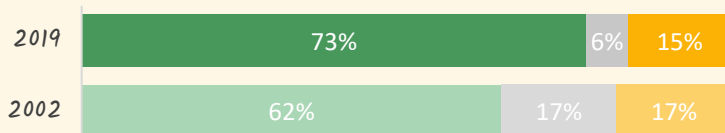
... prefer flexible working hours over fixed working hours

SWE

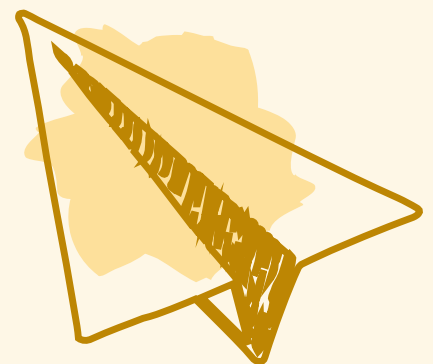
The development in Sweden between 2002-2019 reveals that permanent employment, fixed salaries, and flexible working hours have grown in importance.



■ Fixed working hours ■ It doesn't matter
■ Flexible working hours



■ Fixed salary ■ It doesn't matter
■ Performance-based salary



NORWAY – THE MOST POPULAR DESTINATION FOR NORDIC YOUTH

The modern integration of the Nordic states dates back to 1954 with the introduction of the Nordic Passport Union, which allowed citizens of Nordic states to travel freely across the region. In the wake of COVID-19 - to live in one Nordic country, and work in another, suddenly feels up for debate.

In January-February this year, we asked Nordic youth in what other Nordic countries they would like to work. Overall, a majority of Nordic youth would like to or could consider working in another Nordic country. Norway is the most popular country to work in, and Finland is the least popular country.



I WOULD LIKE TO WORK IN SWEDEN:

DEN: 18% NOR: 7% FIN: 6%

IT'S POSSIBLE THAT I WOULD LIKE TO WORK IN SWEDEN:

DEN: 44% NOR: 42% FIN: 49%

I DON'T WANT TO WORK IN SWEDEN:

DEN: 38% NOR: 51% FIN: 45%



I WOULD LIKE TO WORK IN FINLAND:

SWE: 3% DEN: 11% NOR: 2%

IT'S POSSIBLE THAT I WOULD LIKE TO WORK IN FINLAND:

SWE: 31% DEN: 28% NOR: 22%

I DON'T WANT TO WORK IN FINLAND:

SWE: 65% DEN: 61% NOR: 76%



I WOULD LIKE TO WORK IN DENMARK:

SWE: 5% NOR: 9% FIN: 5%

IT'S POSSIBLE THAT I WOULD LIKE TO WORK IN DENMARK:

SWE: 46% NOR: 42% FIN: 37%

I DON'T WANT TO WORK IN DENMARK:

SWE: 50% NOR: 49% FIN: 58%



I WOULD LIKE TO WORK IN NORWAY:

SWE: 16% DEN: 27% FIN: 7%

IT'S POSSIBLE THAT I WOULD LIKE TO WORK IN NORWAY:

SWE: 60% DEN: 41% FIN: 48%

I DON'T WANT TO WORK IN NORWAY:

SWE: 60% DEN: 32% FIN: 45%

TO STUDY IN ANOTHER NORDIC COUNTRY? NOT AS INTERESTING.

To study in another Nordic country is not as interesting as working in another Nordic country. This being said, a large group of Nordic youth state that they would like to or could consider studying in another Nordic country.

Yet again, Norway is the most popular, and Finland the least popular. Danish youth are the most inclined to leave their country for another Nordic country, and Finnish youth are the least inclined.



I WOULD LIKE TO STUDY IN SWEDEN:

DEN: 10% NOR: 5% FIN: 4%

IT'S POSSIBLE THAT I WOULD LIKE TO STUDY IN SWEDEN:

DEN: 39% NOR: 43% FIN: 34%

I DON'T WANT TO STUDY IN SWEDEN:

DEN: 51% NOR: 52% FIN: 61%



I WOULD LIKE TO STUDY IN FINLAND:

SWE: 3% DEN: 7% NOR: 2%

IT'S POSSIBLE THAT I WOULD LIKE TO STUDY IN FINLAND:

SWE: 23% DEN: 23% NOR: 25%

I DON'T WANT TO STUDY IN FINLAND:

SWE: 74% DEN: 70% NOR: 72%



I WOULD LIKE TO STUDY IN DENMARK:

SWE: 3% NOR: 8% FIN: 2%

IT'S POSSIBLE THAT I WOULD LIKE TO STUDY IN DENMARK:

SWE: 33% NOR: 43% FIN: 26%

I DON'T WANT TO STUDY IN DENMARK:

SWE: 64% NOR: 50% FIN: 72%



I WOULD LIKE TO STUDY IN NORWAY:

SWE: 3% DEN: 14% FIN: 3%

IT'S POSSIBLE THAT I WOULD LIKE TO STUDY IN NORWAY:

SWE: 45% DEN: 43% FIN: 29%

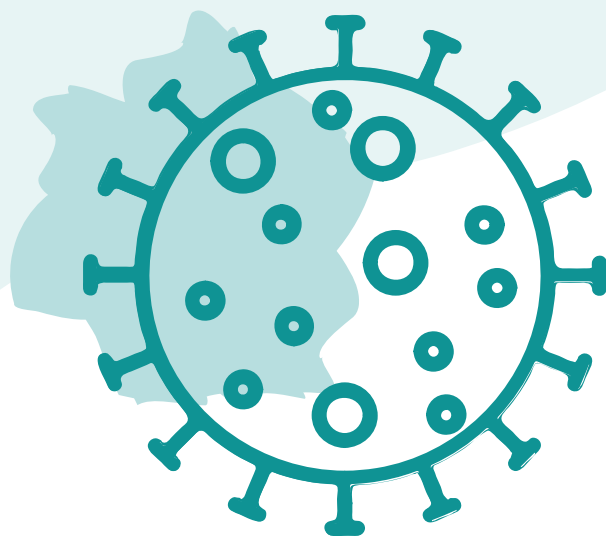
I DON'T WANT TO STUDY IN NORWAY:

SWE: 52% DEN: 43% FIN: 68%

POSSIBLE FUTURE SCENARIOS IN THE WAKE OF THE COVID-19 PANDEMIC

The Youth Barometer carried out a survey in April-May in Sweden and found a few things that most likely have affected some of the results that were presented in this report. The COVID-19 pandemic has affected the Nordic countries differently, but some of the changes in Sweden have most likely happened in the other Nordic countries as well.

- Youth are facing a **very tough labor market** – especially the jobs that youth usually go for straight after high school. A common path for young people in Sweden, after high school, is to work, save up some money, and then travel. In the abovementioned survey, we found that a large portion of those planning to start on that path this fall has had to change their plans. Instead, **many of those are now starting university straight after high school.**
- There were also some indications of a possible trend-break in youth's interest in partying – at least in Sweden.
- A large portion of this Nordic youth generation, report high levels of stress, anxiety, and mental health problems - even before the pandemic hit the Nordic countries. With Nordic youth having been trapped inside, it is a problem that is not likely to disappear anytime soon.



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