Understanding the new Generation:

An insight into Sweden 2016

Sweden has the highest level of Internet usage within the European Union and was an early adopter of broadband, with a clear political aim of transforming Sweden into a digital country. The interest in new technologies has resulted in an innovative environment that has produced tech companies such as *Skype*, *Spotify*, *Minecraft*, *Candy Crush Saga* and *Klarna*.

Ipsos Connect

Source: Ipsos Cultural Insights Network, Dr. Emma Lindblad, Lund University

Google

Contents

Smartphone Usage & Frequency

Ipsos Connect

Google

Smartphone activities

The older age group use smartphones for slightly more different activities

Smartphone activities based on defined list of 16 activities

Ipsos Connect

Question: B4.What do you do regularly on your smartphone? (Average number of mentions)
Base: 13-17=269, 18-21=264, 22-24=353, 25-29=453, 30-34=415
Significance: ▲▼ higher/lower @ 95%

Google

Smartphone activities

13-24s are more likely to use smartphones for entertainment, particularly listening to music.

COMMUNICATION	13-24	25-34
Social networking	87	78
Text (SMS)	86	88
Email	69	82
Make voice calls	62	75
Download free Apps	58	55

ENTERTAINMENT	13-24	25-34
Listen to music	81	64
Watch videos posted online	58	51
Play games	49	44
Watch TV/films	22	20

Ipsos Connect

Question: B4.What do you do regularly on your smartphone?
Base: 13-24=885, 25-34=868
Significance: ▲▼ higher/lower @ 95%

Google

Social media & messaging: usage & frequency

Ipsos Connect

Google

"Most young people use their smart phones to engage with their peer-group on social media apps. This functions as an extension of socializing with friends they meet during the day in school. Among people in the age group 16-25 years, 84 per cent consider the Internet to be an important or very important part of their private lives."

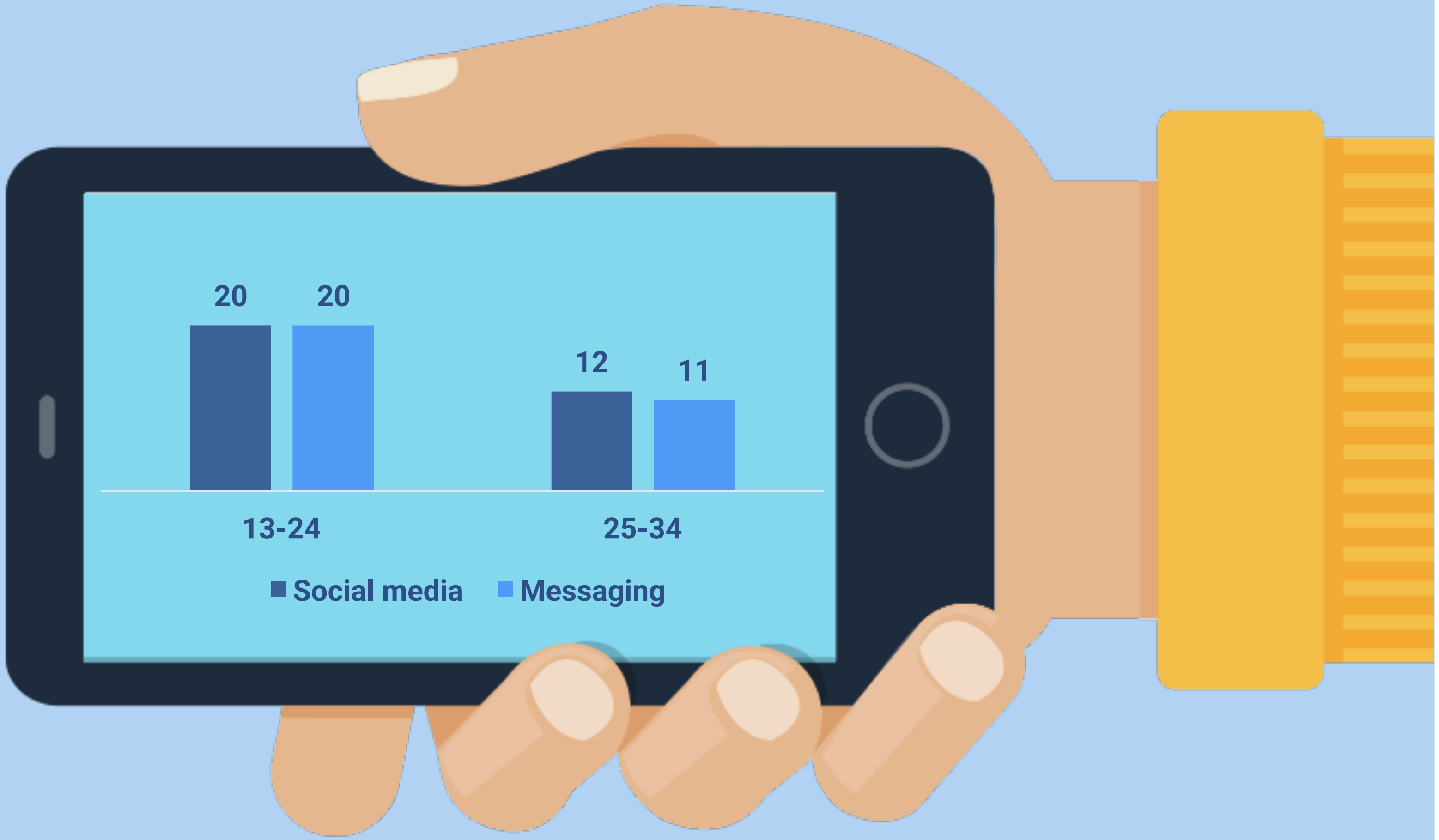
Ipsos Connect

Source: Ipsos Cultural Insights Network, Dr. Emma Lindblad, Lund University

Google

Social media and messaging frequency

13-24s check their phones more and pay similar attention to social media and messaging



Every 15 minutes or more & every 30 minutes

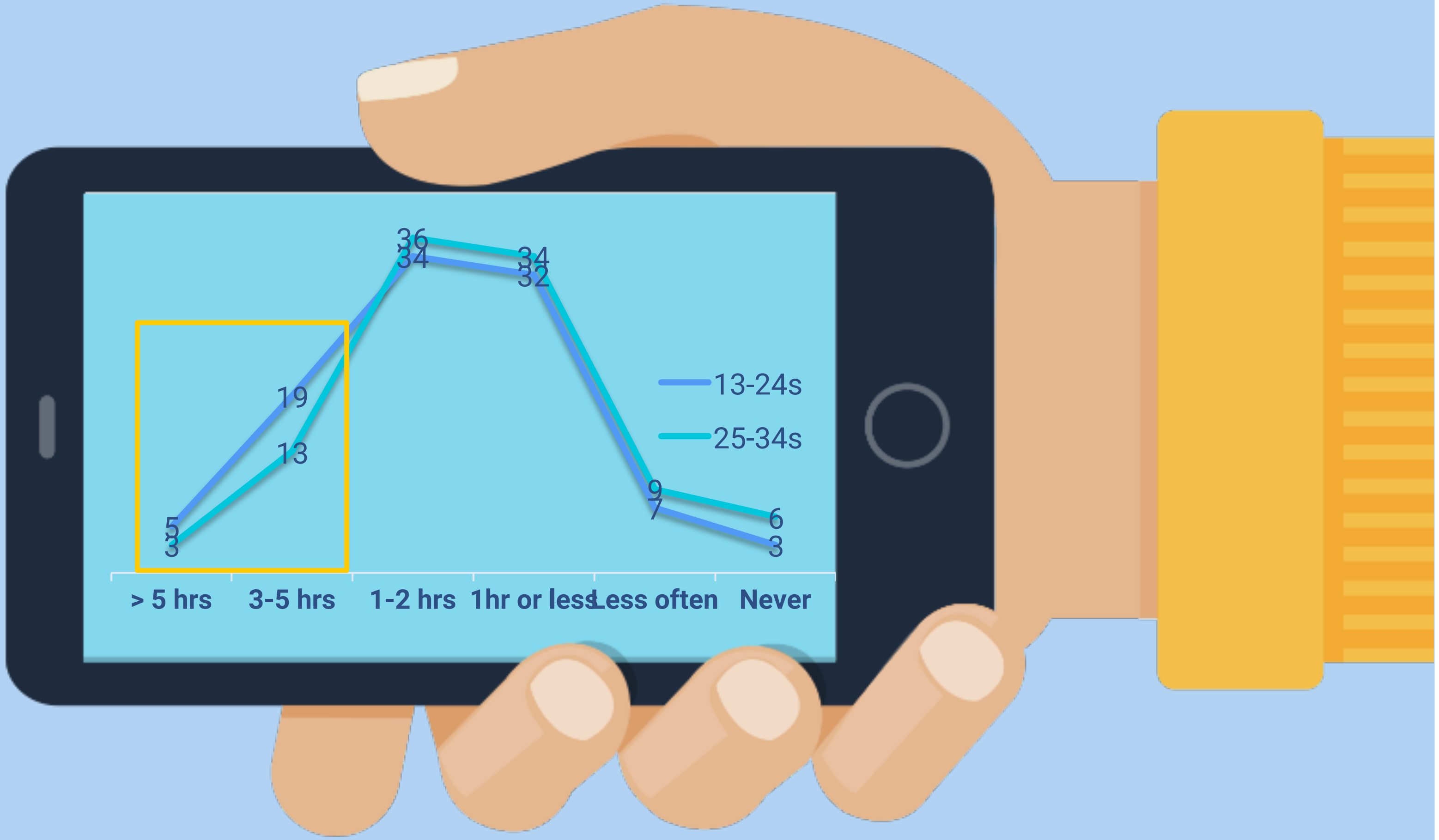
Ipsos Connect

Question: B6. How often do you check your …
Base: 13-24=1000, 25-34=1004
Significance: ▲▼ higher/lower @ 95%

Google

| Average time spent per day

A quarter of 13-24s in Sweden spend 3 hours or more per day on social networking



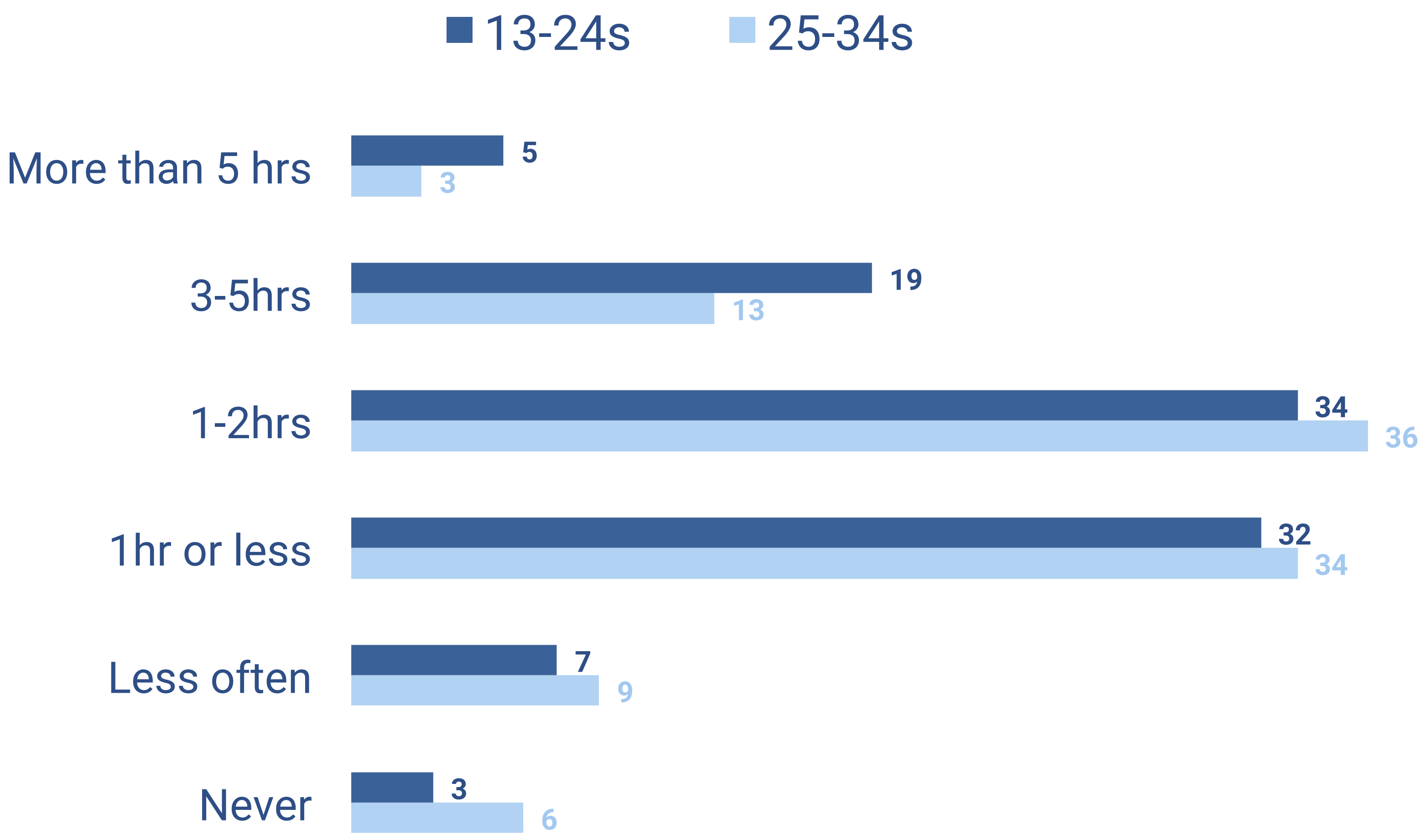
Ipsos Connect

Question: B1b. How much time do you spend on these activities in an average day? (On social networking)
Base: 13-24=1000, 25-34=1004
Significance: ▲▼ higher/lower @ 95%

Google

Use of social networking sites

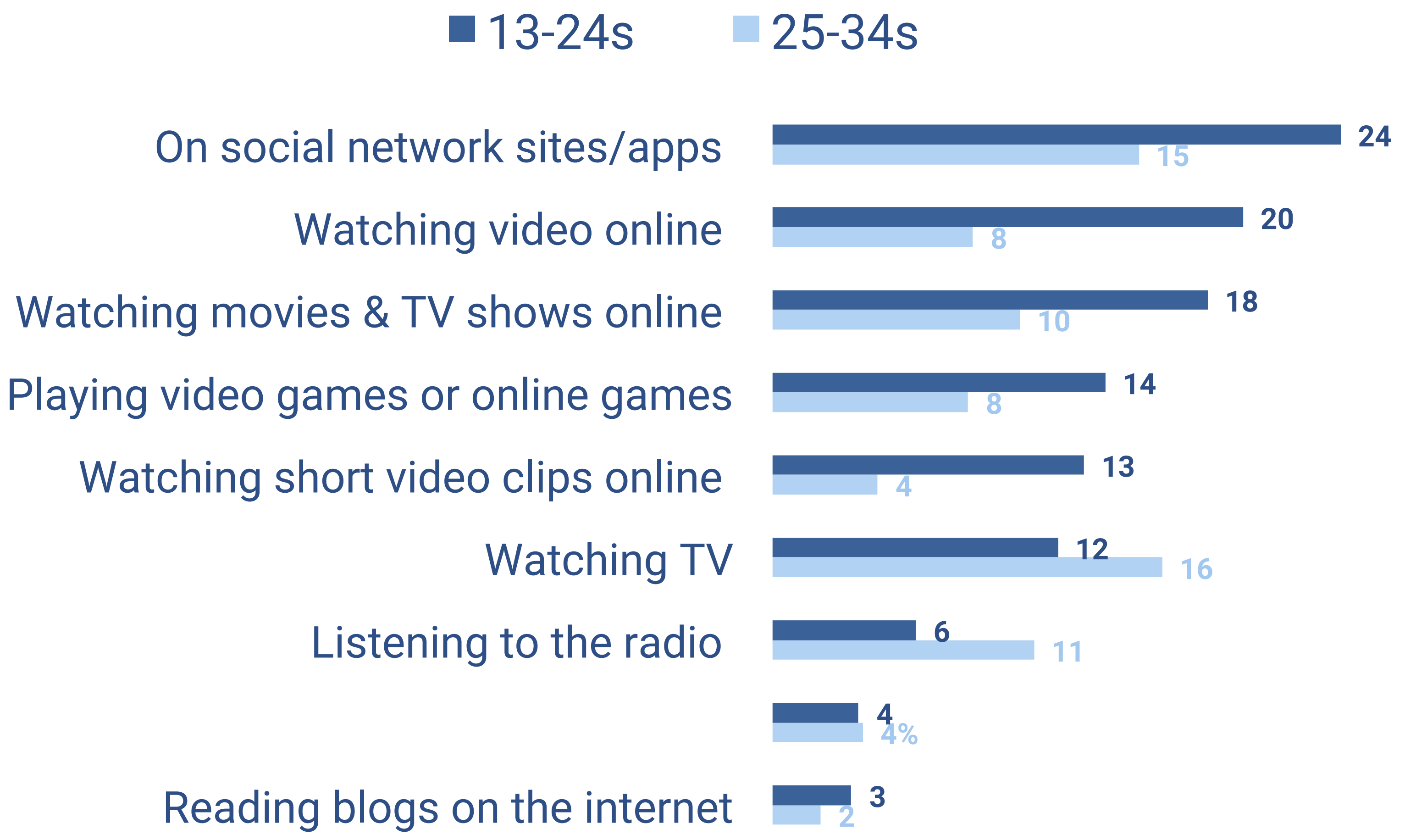
13-24 year olds spend more time on social networking than 25-34 year old Swedes, with a quarter doing this for 3 hours+ per day.



Question: B1b. How much time do you spend on these activities in an average day?
Base: 13-24=1000, 25-34=1004
Significance: ▲▼ higher/lower @ 95%

Time spent on activities

13-24s spend more time on digital activities; notably social networking, watching online video and TV or playing games.



Question: B1b. How much time do you spend on these activities in an average day?
Base: 13-24=1000, 25-34=1004
Significance: ▲▼ higher/lower @ 95%

Ipsos Connect

Google

Usage & attitudes of social media platforms

Ipsos Connect

Google

Social media networks usage

13-24s spend significantly more time on YouTube then the older group while usage of the leading social network is fairly similar across the two groups.

Leading social network

	13-24	25-34
More than 5hrs a day	4	3
3-5hrs a day	12	11
1-2hrs a day	30	29
1hr or less a day	35	34
Less often	10	12
Never	8	▲ 11

YouTube

	13-24	25-34
More than 5hrs a day	▲ 5	1
3-5hrs a day	▲ 14	5
1-2hrs a day	▲ 27	15
1hr or less a day	28	32
Less often	22	40 ▲
Never	3	6 ▲

Question: B8. How often do you use each of the following on an average day?
Base: (13-24)= 1000, (25-34)=1004
Significance: ▲▼ higher/lower @ 95%

Ipsos Connect

Google

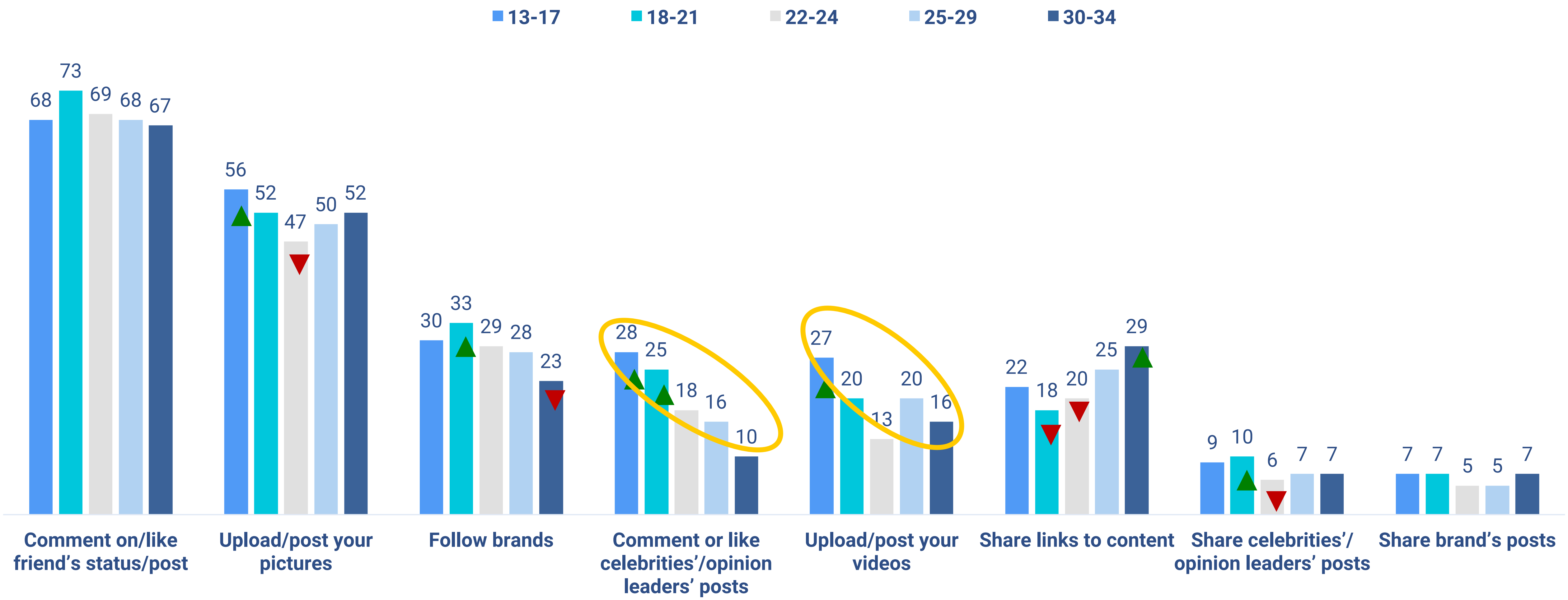
13-17s are typically more active on social media; commenting, sharing & uploading more so than 18-34s

Ipsos Connect

Google

Social media activity

13-17s are engaging with social media through visual content more than other age groups – they are most likely to upload their own pictures and videos. There is much more interaction with celebrities than brands.



Question: B9. On your social media accounts, which of the following do you do?
Base: (13-17) =310, (18-21) =299 , (22-24) =391, (25-29) =512, (30-34) =492
Significance: ▲▼ higher/lower @ 95%

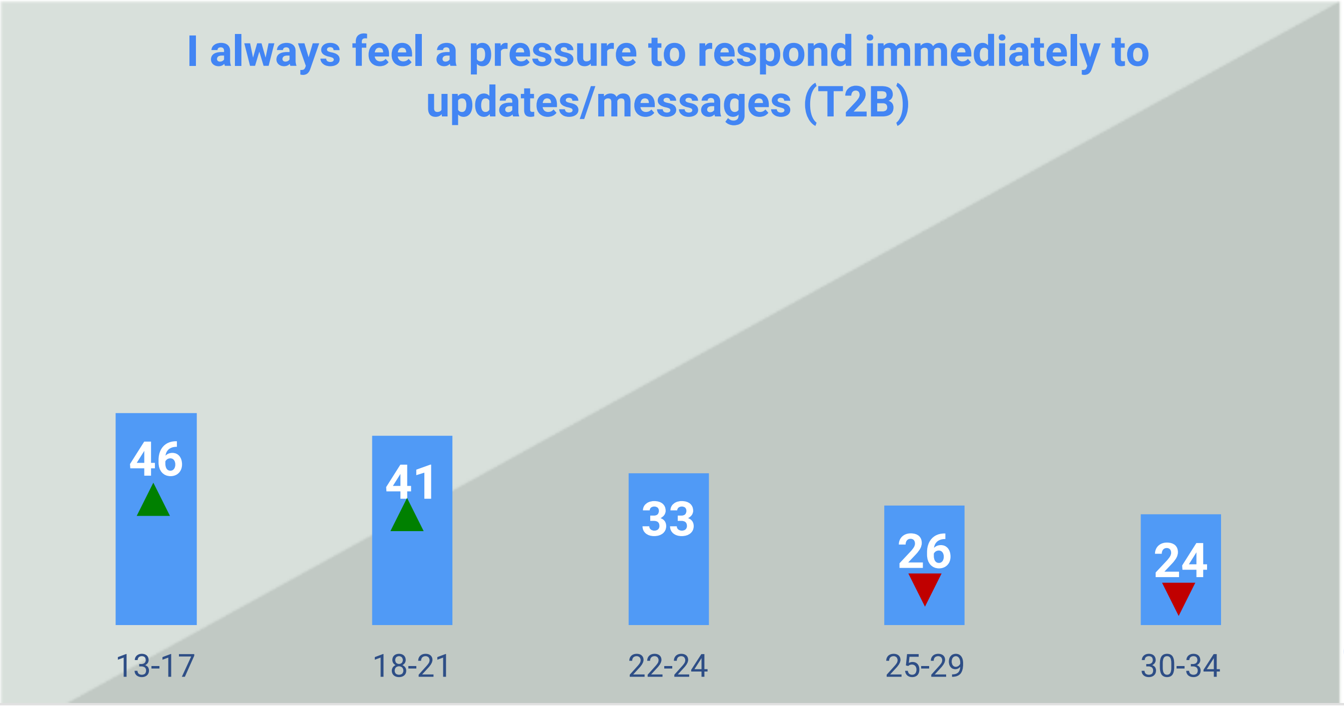
46% of 13-17s feel a pressure to respond immediately to message/updates

Ipsos Connect

Google

| Pressure to respond immediately to updates/messages

The younger age groups (13-21s) feel the most pressure to respond immediately.



Question: B18. Thinking about social media, how much do you agree with the statements below? (T2B)

Base: (13-17) =310, (18-21) =299 , (22-24) =391, (25-29) =512, (30-34) =492

Significance: ▲▼ higher/lower @ 95%

Ipsos Connect

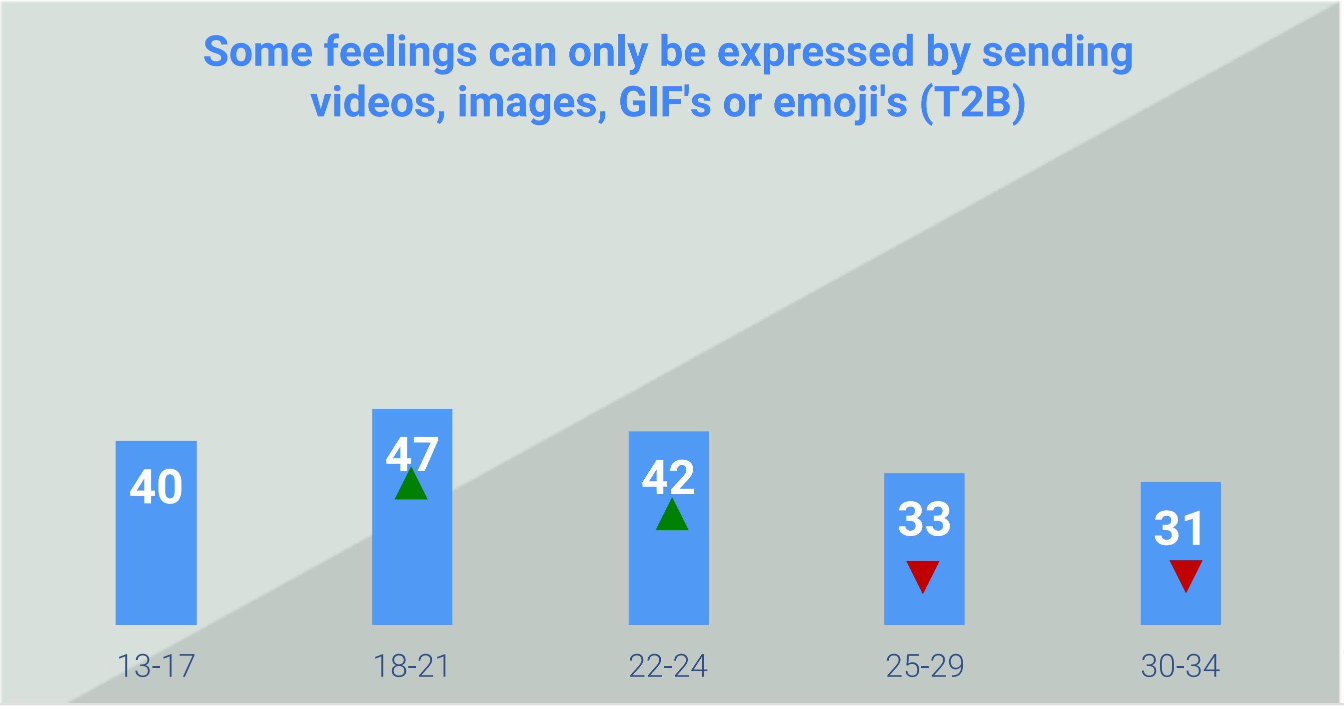
47% of 18-21s agree that some feelings can only be expressed by sending videos, images, GIFs or emoji's

Ipsos Connect

Google

| Expressing feelings by sending videos, images, emoji's

13-17s are significantly more likely to agree that some feelings can only be expressed using videos, images etc.



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Base: (13-17) =310, (18-21) =299 , (22-24) =391, (25-29) =512, (30-34) =492

Significance: ▲▼ higher/lower @ 95%

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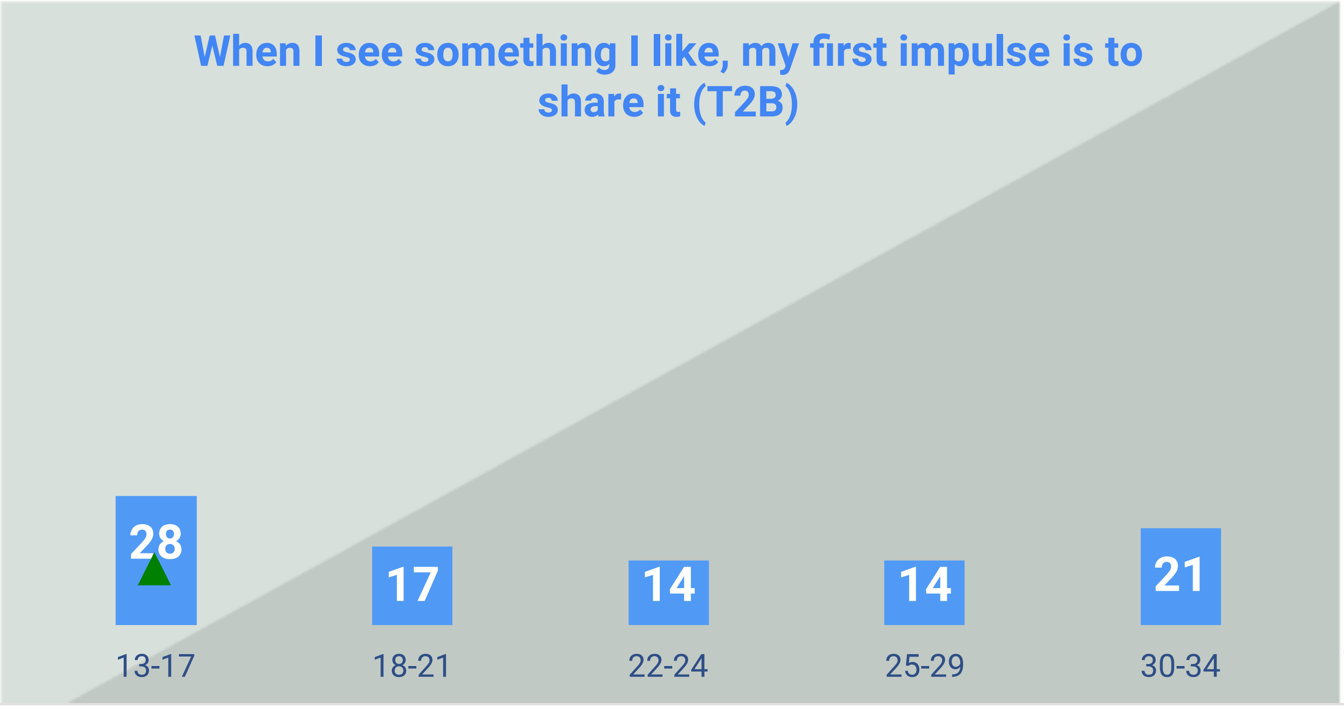
Impulse to share

There is significantly greater impulsiveness amongst 13-17s and 30-34s – when they see something they like, they share it.



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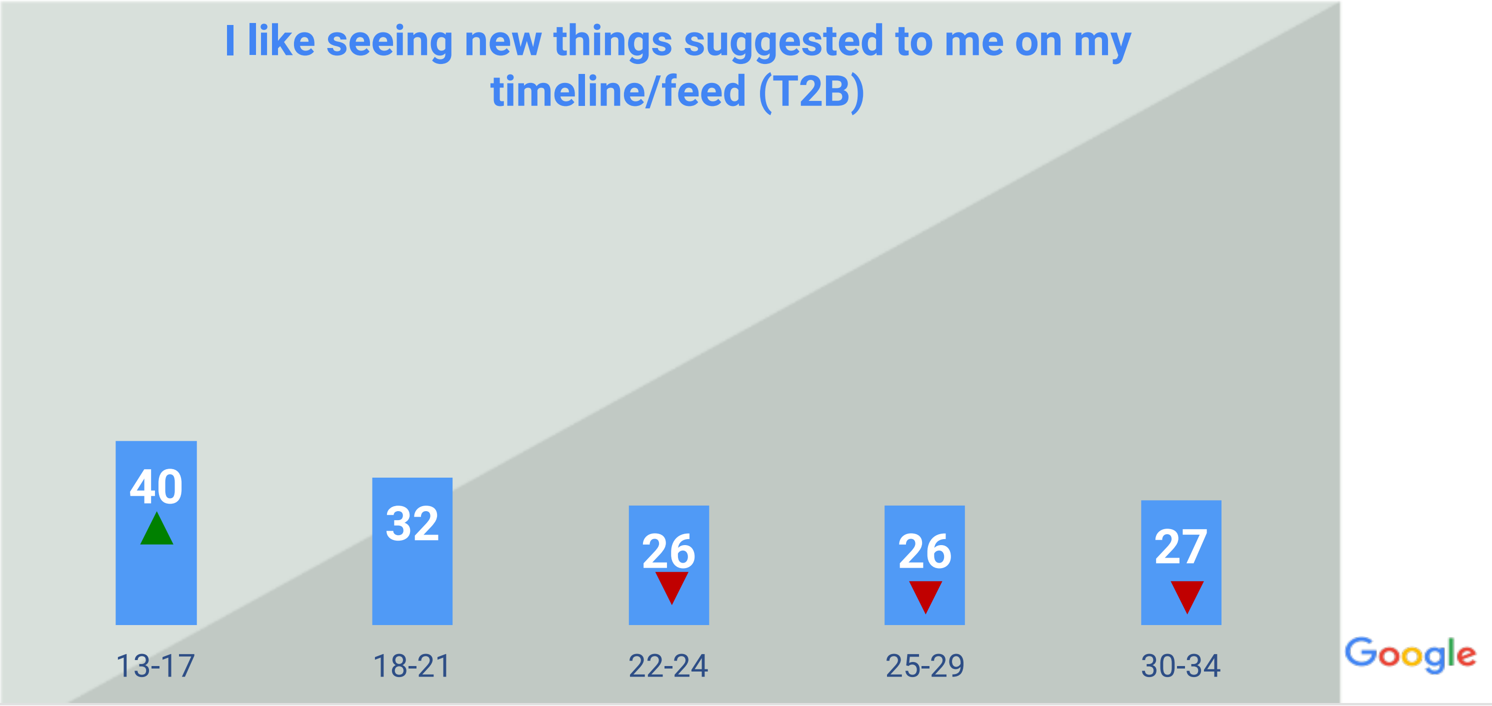
Base: (13-17) =310, (18-21) =299 , (22-24) =391, (25-29) =512, (30-34) =492

Significance: ▲▼ higher/lower @ 95%

Suggestions on timeline/feed

Younger audiences enjoy seeing suggestions on their timeline/feed. Older groups are less keen to see suggestions



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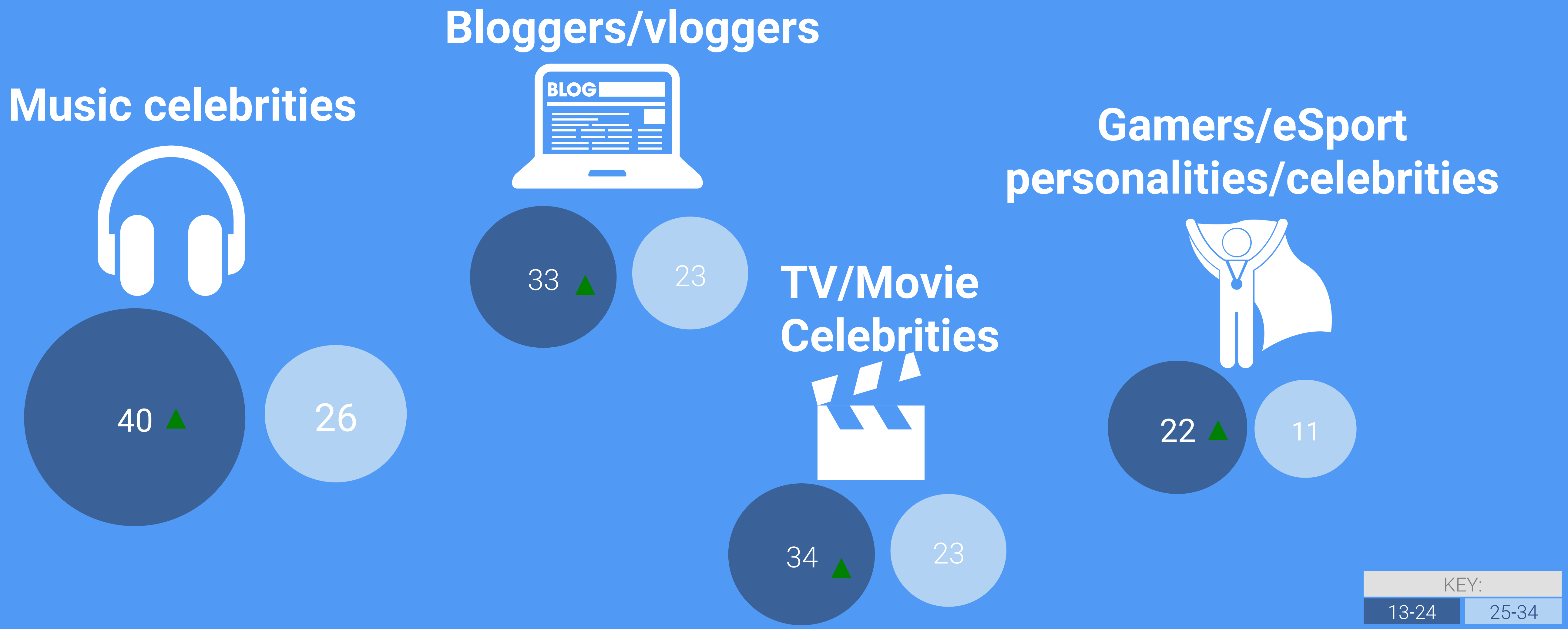
Base: (13-17) =310, (18-21) =299 , (22-24) =391, (25-29) =512, (30-34) =492

Significance: ▲▼ higher/lower @ 95%

Ipsos Connect

Who is being followed on social media?

Following Celebrities, Bloggers/vloggers and gamers/eSport personalities is significantly higher amongst 13-24s.



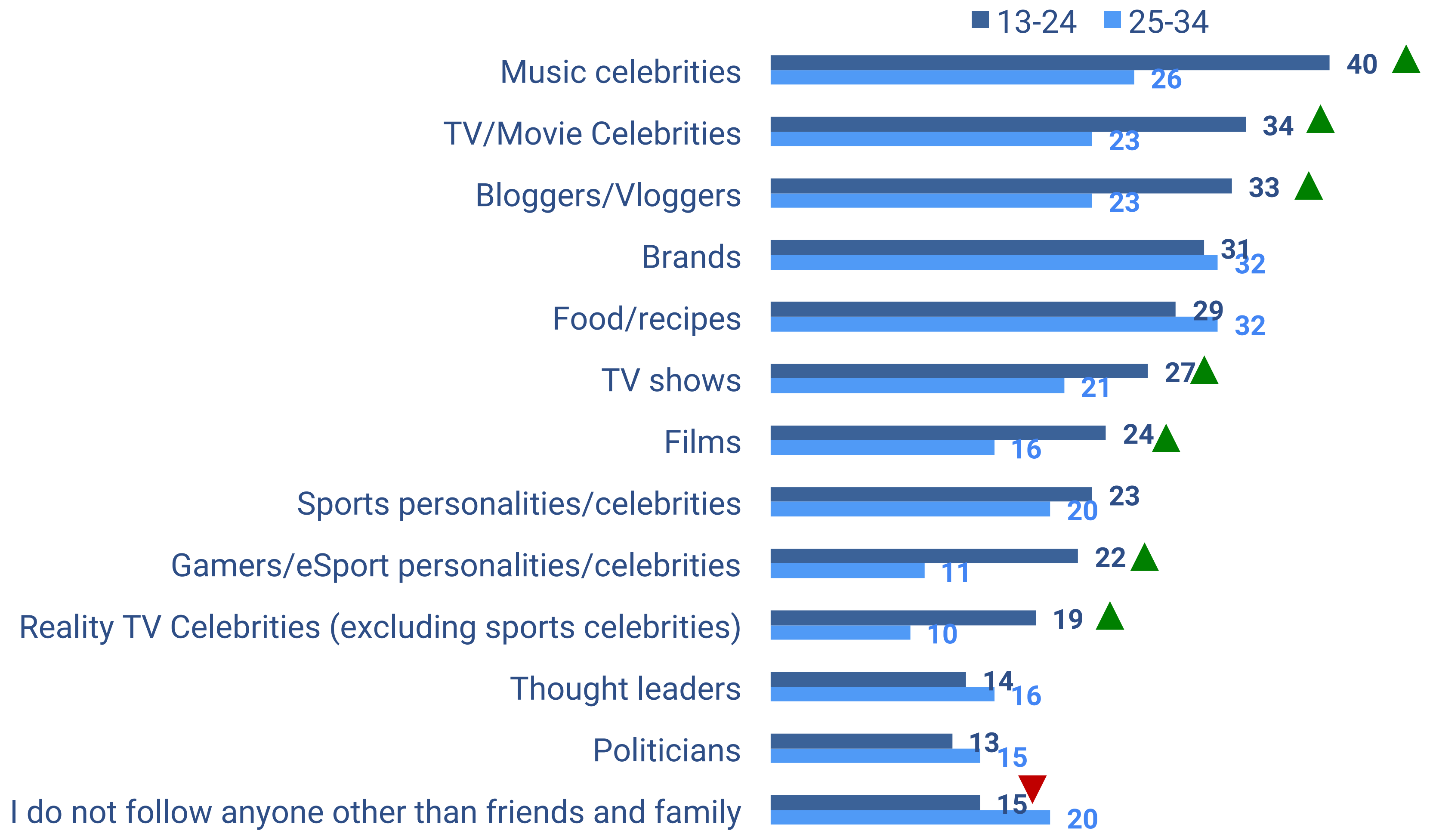
Question: B10. In addition to your friends and family, who/what else do you follow on your social media networks?
Base: (13-24) =1000, (25-34) =1004
Significance: ▲▼ higher/lower @ 95%

Ipsos Connect

Google

Who is being followed on social media?

13-24s tend to follow people like music/TV celebrities whereas 25-34s are most likely to follow brands and food/ recipes, perhaps seeking information more than interaction.



Question: B10. In addition to your friends and family, who/what else do you follow on your social media networks?
Base: (13-24) = 1000, 25-34=1004
Significance: ▲▼ higher/lower @ 95%

Online Video

Ipsos Connect

Google

What is looked for most in online videos?

Although a high percentage amongst both groups look for entertainment and funny videos in online videos, the younger age group are more likely to use them for reviews and discovering new trends.

	13-24	25-34
Entertainment	71	63
Funny short videos	64	58
New skills	46	45
Reviews Product/ brands	32	26
Food/Recipes	31	28

	13-24	25-34
News/current affairs	29	35
Exercise	29	26
New trends	22	10
Product launches	15	13

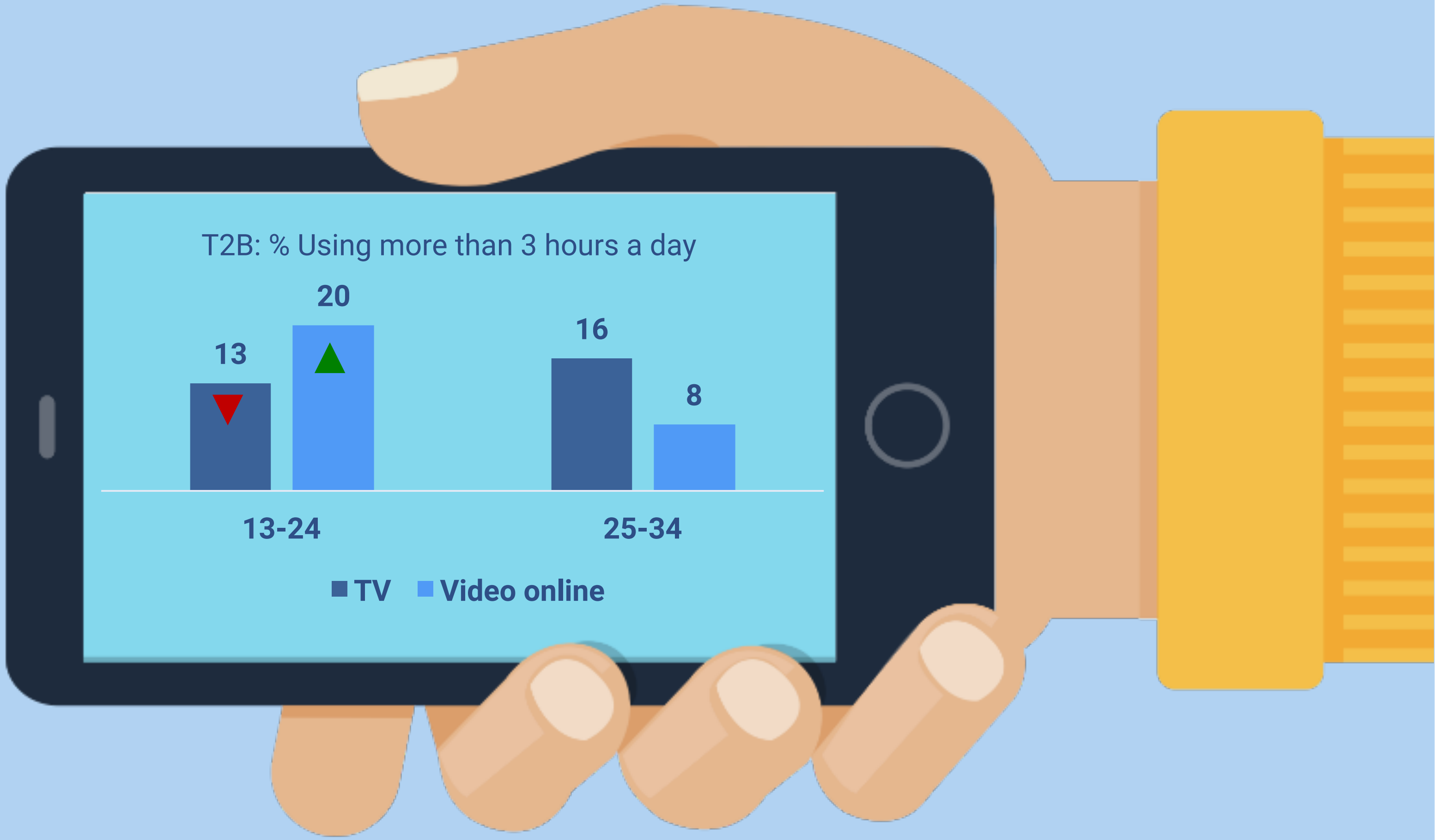
Question: B12a. When you watch videos online, what do you mostly look for in those?
Base: (13-24) =1000, (25-34) =1004
Significance ▲▼ higher/lower @ 95%

Ipsos Connect

Google

TV & Online Video usage

Online video usage is significantly more popular amongst the 13-24s than the older age group



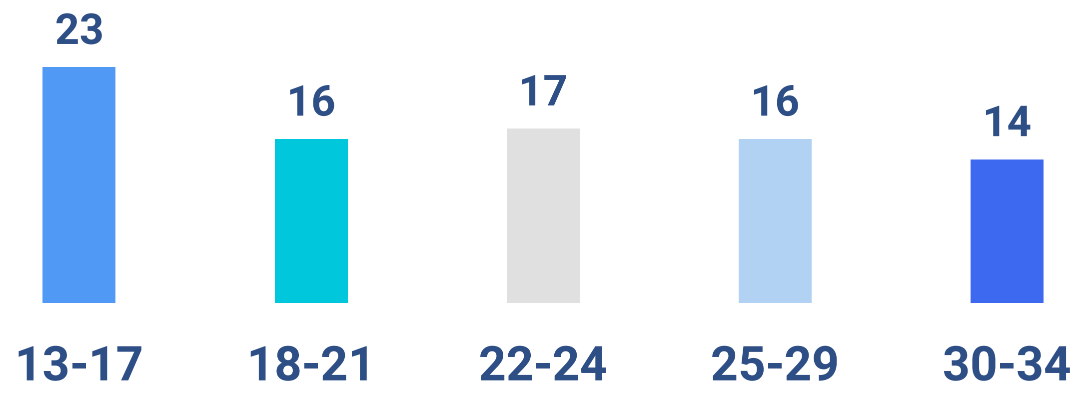
Question: B1b.How much time do you spend on these activities in an average day? (T2B)
Base: (13-24)=1000, (25-34)=1004
Significance: ▲▼ higher/lower @ 95%

A look at online video

Almost one fifth of 13-24s go to YouTube to get immediate answers but the youngest age group is significantly more likely to use YouTube

13-24	25-34
19	15

Where do you go when you need to get immediate answers?



Question: B20. Where do you go when you need to get immediate answers?
Base: (13-24) =1000, (25-34) =1004
Significance ▲▼ higher/lower @ 95%

Online videos are not just for watching funny/entertaining videos but also for learning new skills, watching reviews and so much more!

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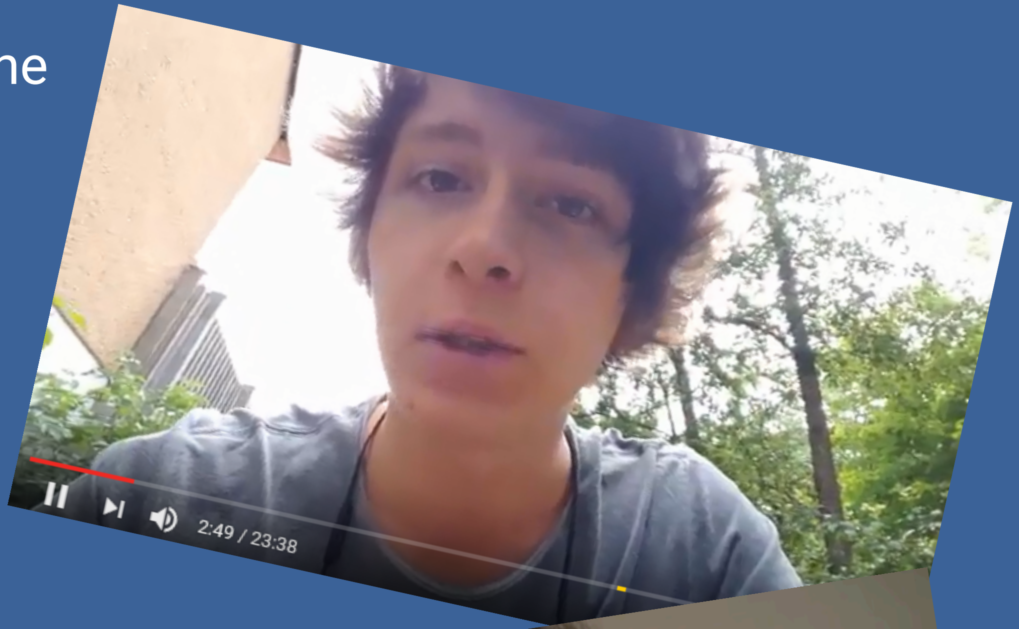
Online videos

Entertainment and funny short videos most sought on videos online



	Entertainment	Funny short videos
13-24	71 ▲	64 ▲
25-34	63	58

KEY:

13-24 25-34

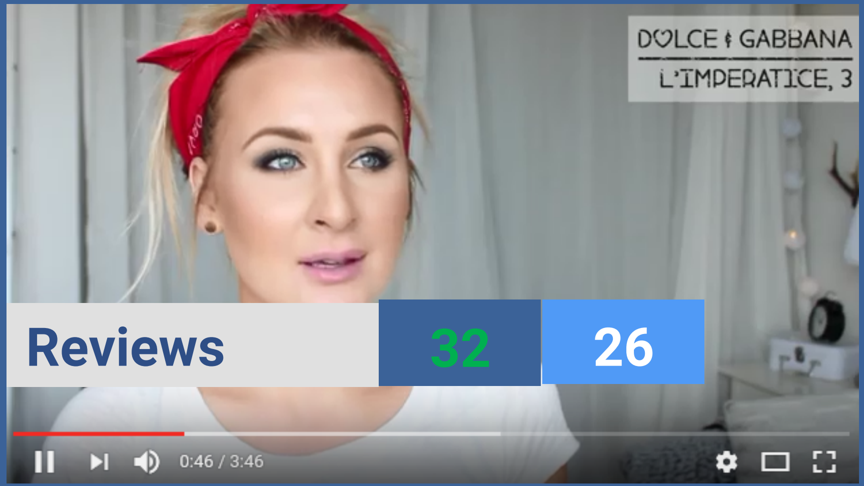
Question: B12a. When you watch videos online, what do you mostly look for in those?
Base: (13-24) =1000, (25-34) =1004
Significance ▲▼ higher/lower @ 95%

Ipsos Connect

Google

Online videos

…but a high percentage also use them for practical every day needs.



KEY:

13-24	25-34

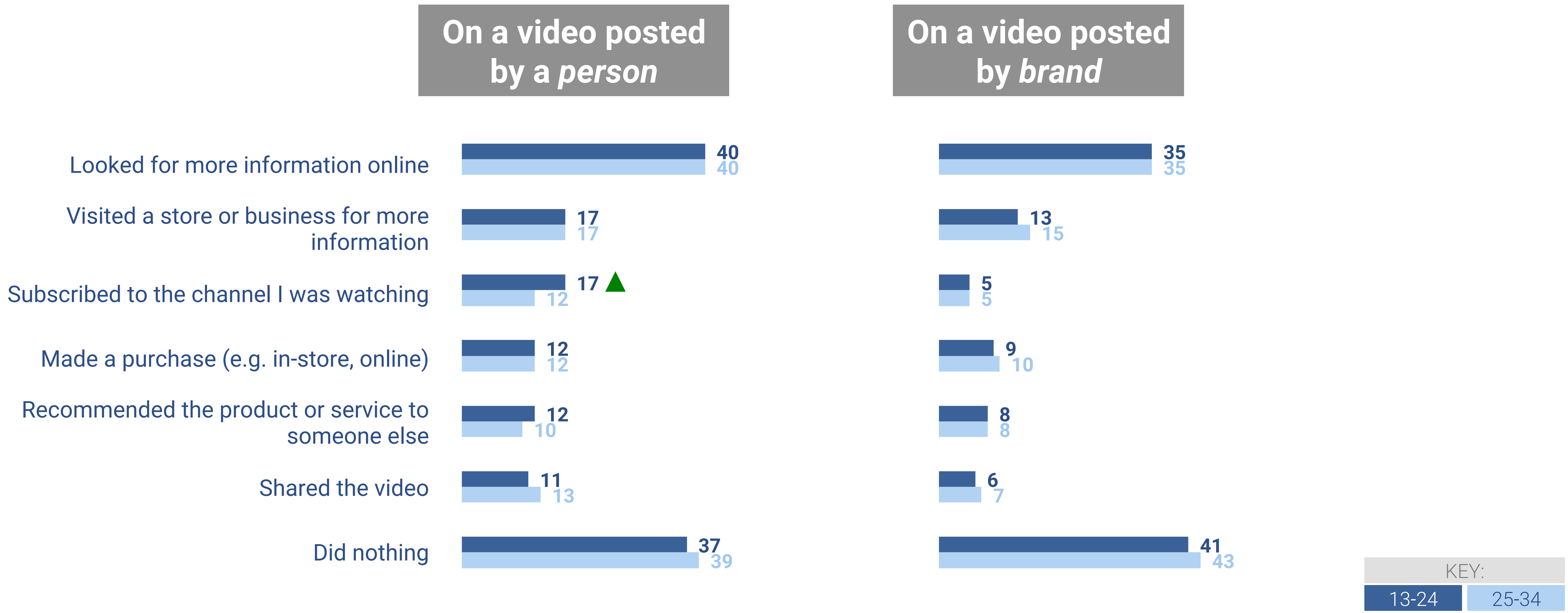
Ipsos Connect

Question: B12a. When you watch videos online, what do you mostly look for in those?
Base: (13-24) =1000, (25-34) =1004
Significance ▲▼ higher/lower @ 95%

Google

Actions taken after seeing a brand in online video

Swedish consumers are more likely to interact with videos posted by people than brands and there is little difference between the two groups with the exception of likelihood to subscribe



Question: B14. After seeing a brand or product showcased when watching an online video, which of the following actions have you ever taken?

Base: (13-24) =953, (25-34) =922

Significance ▲▼ higher/lower @ 95%

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Younger groups are looking to YouTube personalities and Vloggers for recommendations

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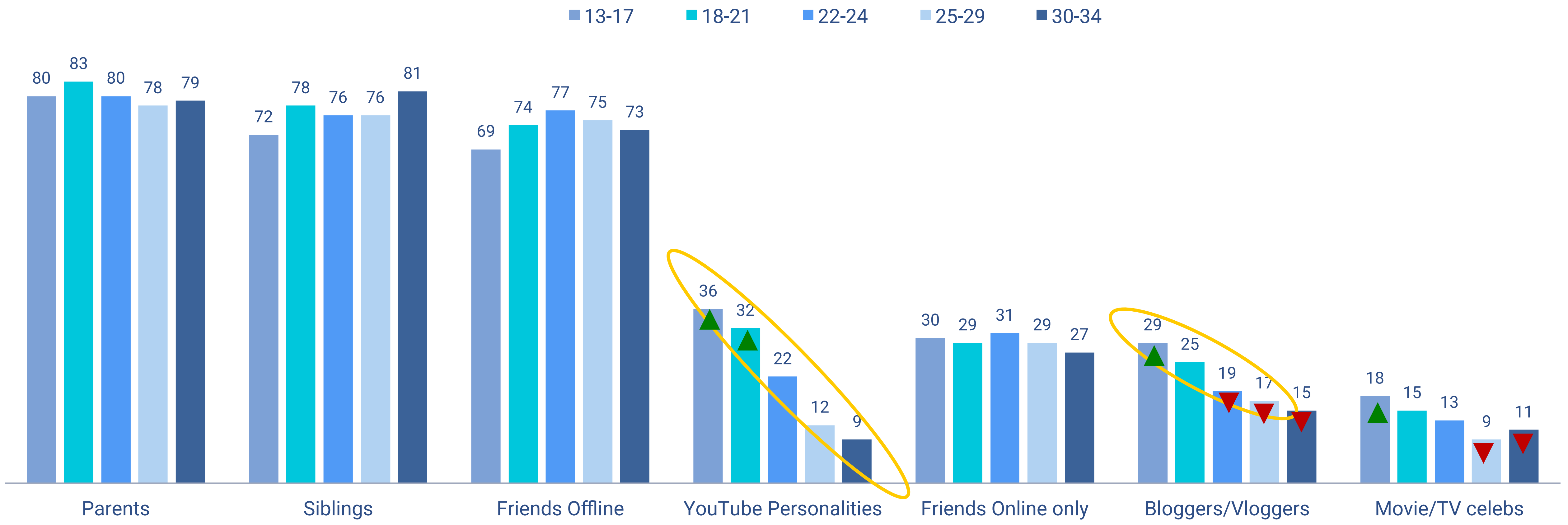
Google

Trust/recommendations on products

YouTube personalities and Bloggers/Vloggers have distinct kudos amongst 13-21s compared to the older ages.



Question: IP5 How much do you trust recommendations and suggestions on products, brands and content from…?

Base: (13-17) =310, (18-21) =299 , (22-24) =391, (25-29) =512, (30-34) =492

Significance ▲▼ higher/lower @ 95%

Ipsos Connect

Google

Where do you tend to see advertising that…

Most enjoyable advertising seen on You Tube (above TV), it’s advertising is second to Facebook for sharing with friends and third most effective in relating products and services sought

	YouTube Rank	13-24	25-34
Advertising I enjoy	#1	29	19
Advertising I like to share	#2	17	11
Advertising related to products/services sought	#3	26	19

Question: IP7 Where do you tend to see the following …?
Base: (13-24) =1000, (25-34) =1004
Significance ▲▼ higher/lower @ 95%

KEY: 13-24 25-34

13-24

Where they go for more info

YouTube is the #1 destination for comedy and music amongst 13-24s – they may use other sources for general entertainment.

#1	#2	#3
Music	Entertainment	Celebrities
Comedy	Gaming	Gadgets
	Beauty	Culture
	Food, cooking and recipes	
	Technology	
	Sports	

Question: IB2.1 Where do you go to find out more about the following topics?
Base: (13-24) =1000
Significance ▲▼ higher/lower @ 95%

Ipsos Connect

Google

Where they go for more info

13-17s are more likely to go to You tube than the older age groups for all the different interests

YouTube

	13-17	18-21	22-24	25-29	30-34
Comedy	72	70	64 ▼	58 ▼	53 ▼
Fashion	26	20	12 ▼	9 ▼	6 ▼
Food, cooking and recipes	29	29	26	22 ▼	18 ▼
Ecology/Nature	17	13	12	11 ▼	9 ▼
Music	72	72	65	60 ▼	58 ▼

Question: IB2.1 Where do you go to find out more about the following topics?
Base: (13-17)=310, (18-21)=299, (22-24)=391, (25-29)=512 (30-34)=492
Significance ▲▼ higher/lower @ 95%

Sig tested vs 13-17

Where they go for more info

The pronounced use of YouTube amongst teens continues with information on celebrities showing the most significant difference compared to older adults

YouTube	13-17	18-21	22-24	25-29	30-34
Gadgets	30	25	21 ▼	21 ▼	19 ▼
Celebrities	35 ▲	25	19 ▼	12 ▼	12 ▼
Sports	24	19	19	13 ▼	13 ▼
Entertainment	56	54	49	44 ▼	38 ▼
Technology	29	25	25	24	21 ▼

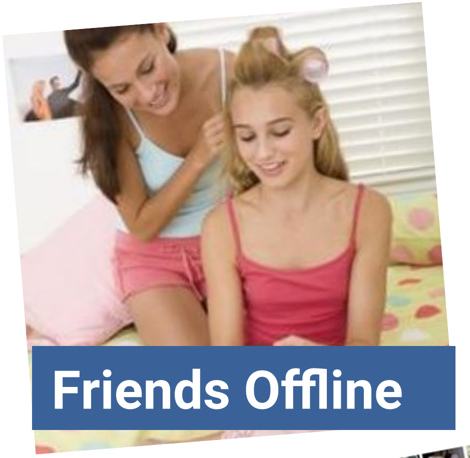
Question: IB2.1 Where do you go to find out more about the following topics?
Base: (13-17)=310, (18-21)=299, (22-24)=391, (25-29)=512 (30-34)=492
Significance ▲▼ higher/lower @ 95%

Sig tested vs 13-17

Where they go for more info about Beauty

Top 3 sources for 13-24s are YouTube, blogs and celebrities with friends offline, FB and friends online featuring at bottom of the list

		13-24	25-34
#1	YouTube	32	15
#2	Blogs	24	18
#3	Celebrities	14	7



	13-24	25-34
Friends Offline	11	9
Social media	10	9
Friends Online	4	3

KEY:

13-24	25-34

Question: IB2.1 Where do you go to find out more about the following topics?
Base: (13-24) = 1000, (25-34) = 1004
Significance ▲▼ higher/lower @ 95%

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Appendix

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Research Objectives

- The goal of the study was to develop a world view of youths and young adults across selected markets, alongside the cultural context young people live within.
- We aimed to understand how youths and young adults see, interact with, and inhabit their on and offline worlds, and to appreciate the underlying shifts in their attitude and behaviour that will influence the Google of tomorrow.

Study Methodology

Main Sample:

13-24 N=1000

Boost Sample:

25-34 N=1004

The Boost sample provides a benchmark for the 13-24s and enables a more longitudinal assessment of trends

Device Agnostic Study: the questionnaire was developed to work across mobile, tablet & desktop so participants can fill in the survey in the way they feel most comfortable

Ipsos Connect

Google

| Quotas set on age, gender and region

13-24s

AGE	Males	Females	Total
13 - 17	14	17	31
18 - 24	28	41	69
TOTAL	42	58	100

REGION	Nat rep quotas
Norrland	9
Mellansverige	25
Stockholm	22
Västsverige	20
Södra Sverige	23
Total	100

25-34s

AGE	Males	Females	Total
25 – 29	23	28	51
30 - 34	22	27	49
TOTAL	45	55	100

REGION	Nat rep quotas
Norrland	8
Mellansverige	23
Stockholm	26
Västsverige	20
Södra Sverige	23
Total	100

Note: Sample balanced through weighting but not exactly the same as census figures on age/gender due to numbers recruited.

Ipsos Connect Source: Census 2010 & Eurostat 2013

Google

| The questionnaire was designed around key themes

Behaviours
- Devices used
- Time spent on activities
- Smartphone usage
- Must have apps

Influencers & Interests
- Sources of information & advice
- Role of parents
- Role of online video
- Online vs offline relationships
- Attitudes to advertising

Social Media
- Usage and frequency
- Sharing and following
- Closeness to platforms
- Attitudes to social media

Shopping
- Shopping behaviours & attitudes

Ipsos MORI standards & accreditations

Ipsos MORI's standards and accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Our focus on quality and continuous improvement means we have embedded a 'right first time' approach throughout our organisation.

ISO 20252

The international market research specific standard that supersedes BS 7911 / MRQSA & incorporates IQCS (Interviewer Quality Control Scheme); it covers the 5 stages of a Market Research project. Ipsos MORI was the first company in the world to gain this accreditation.

MRS Company Partnership

By being an MRS Company Partner, Ipsos MORI endorse and support the core MRS brand values of professionalism, research excellence and business effectiveness, and commit to comply with the MRS Code of Conduct throughout the organisation.

ISO 9001

International general company standard with a focus on continual improvement through quality management systems. In 1994 we became one of the early adopters of the ISO 9001 business standard.

ISO 27001

International standard for information security designed to ensure the selection of adequate and proportionate security controls. Ipsos MORI was the first research company in the UK to be awarded this in August 2008.

Data Protection Act

Ipsos MORI is required to comply with the Data Protection Act; it covers the processing of personal data and the protection of privacy

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos MORI Terms and Conditions.