

Revised October 2017



#TeenSurvey 2017

Using **insight** from
teenagers to **influence**
#TeenStrategies.

#TeenStrategy

For more information please contact **01422 250070**.
Alternatively email **hello@fourteen19.co.uk**
or visit **www.fourteen19.co.uk**

Introduction

At **Fourteen19®**, we help brands, organisations and charities to improve their engagement with young people and their influencers. Whether this is to raise awareness of a campaign or increase uptake of a product or service, we know that all young people are different and it is important to understand these differences before embarking on any activity to engage them.

There are around 5 million young people aged 14-19 in the UK. From our experience of working with thousands of young people we have found that there are trends we can follow and assumptions we can make which allows us to create strategies based on extensive insight.

The most effective way to engage young people is through their influencer network i.e. schools, colleges, teachers, parents, youth leaders etc.

Our **#TeenStrategy** approach of engaging influencers and using them to amplify messages to end users relies on undertaking good quality insight.

In order to 'sanity check' our knowledge & experience and to provide entry-level insight for professionals involved in youth engagement, we have undertaken a **#TeenSurvey** with around 100 young people. Since we started in 2010, we have delivered hundreds of research and insight sessions for clients and we have included a number of the most regularly asked questions in our survey.

The questions we asked fitted into three areas:

- Getting into the mindset of young people
- Understanding their influencers and how they search for information
- Identifying the correct communication channels

The results of our **#TeenSurvey** highlight the attitudes, interests, motivations, influences and future plans of young people today. Understanding these aspects will enable marketers and influencers to communicate more effectively to them, and improve engagement with key products and services.

We are confident that understanding and implementing these findings into all youth engagement strategies will significantly improve reach, engagement and return on investment.

Update: Revised October 2017

During the summer of 2017 we conducted a follow-up survey with 14-15 year olds. The results of this additional survey can be found from Page 19.



Some of the students from Huddersfield New College that helped with delivering the survey & Alex our senior youth marketing executive.

Executive Summary

Our **#TeenSurvey** results support our viewpoint that whilst not all young people are the same, they do share similar views and opinions that can be used to make informed strategic decisions in the development of campaigns.

The key headlines from this research are:

- As young people gain more **independence** their interests, motivations and influencers change, as do their habits for searching for information
- The important things in young people's lives can change from year to year so it is important to take this into account when communicating with them as these **motivations and desires** can be leveraged against a product or service
- Communicating to young people's influencers (**teacher/tutors & parents**) is as important, if not more-so, in helping young people make decisions as communicating with them directly
- Ensure that information about your product or service is available **online and is easy to find** when young people begin to search for information
- Young people use social media to engage and communicate with brands and individuals, but **not as a primary source of information**
- Creating **clear awareness** and **understanding** of a product/service or brand is important in helping young people begin their decision-making process
- Young people have **clear motivations** for their future education and employment
- By understanding the **role of influencers**, **young people's motivations** and identifying the **best communication channels**, you can turn your next project from good to great and ensure a positive return on investment

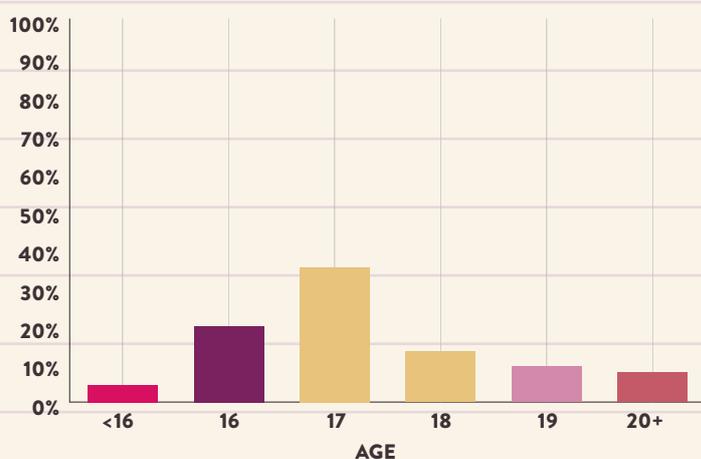
Who did we survey?

The survey had 96 respondents who completed an online set of questions identified by a working group of young people and Fourteen19®.

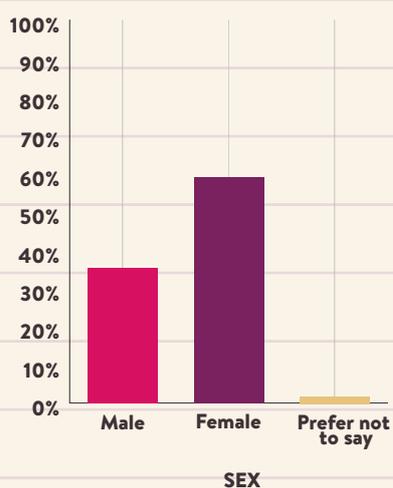
The survey was completed by young people aged from <16 to 20+ with the majority (85%) aged 16-19. This report focuses solely on the responses of 16-19 year olds.

The survey was distributed during February & March 2017 and analysed in April 2017.

How old are you?



What sex are you?



Young people at a glance

The way young people make decisions and engage with products and services is influenced by several factors. We surveyed the young people on several topics which has enabled us to create an at-a-glance summary of the results for each age from 16-19.

Age	16	17	18	19
At this moment in time what is the most important thing to you RIGHT NOW?	Passing exams (52%) Enjoying life (38%)	Passing exams (43%) Enjoying life (31%)	Getting into university (38%)	Enjoying life (60%)
Whose judgement would you MOST TRUST to make a recommendation that could improve your future opportunities?	Parent (43%) Teacher (38%)	Teacher (58%) Parent (30%)	Teacher (50%)	Parent (33%) Teacher (22%)
In the last 12 months, which of the following have you looked for information on?	Fitness (77%) Education (54%)	Education (75%) Employment (75%)	Education (69%) Employment (62%) Health (54%)	Employment (80%) Education (70%) Health (60%)
In the next 12 months which of the following do you think you will search for information on?	Employment (55%) Education (55%) Health (41%)	Employment (89%) Education (64%)	Employment (69%) Fitness (62%)	Health (60%) Employment (60%)
How will you look for information?	Online search (90%)	Online search (95%)	Online search (100%)	Online search (100%)
Where will you search online?	Known websites (100%) Search engine (40%)	Search engine (100%) Known websites (14%)	Search engine (87%) Known websites (62%)	Search engine (75%)
Which of the following routes do you think will provide you with the best chance of getting a job?	Relevant degree (50%)	Relevant degree (53%) Apprenticeship (20%) Work experience (20%)	Relevant degree (69%)	Work experience (44%)
What are you most looking for in a future job?	Enjoyment (40%) High paying (30%)	Enjoyment (64%)	Enjoyment (62%)	Enjoyment (78%)
Where do you think would be the best place to find out about a job?	Careers Service (58%) Internet (26%)	Internet (58%)	Internet (67%)	Internet (89%)
Which of the following social media have you used in the last 24 hours?	Snapchat (95%) Instagram (95%) Facebook (89%)	Snapchat (97%) Instagram (80%) Facebook (78%)	Instagram (100%) Snapchat (92%) Facebook (83%)	Facebook (100%) Twitter (89%) WhatsApp (89%)
Which of the following would you describe yourself as?	Confident (62%) Clever (62%)	Happy (60%) Confident (46%)	Happy (67%)	Happy (56%) Good leader (56%)

Getting into the mindset of young people

As with any audience, it is important to understand who young people are, what they're thinking and what is important to them. This will help ensure key messages resonate with their mindset and life choices.

To successfully engage with young people, it is important to empathise with their feelings and self-perception. By understanding how young people feel about themselves, we can create authentic content that resonates with them on a personal level. This can drive engagement and sharing, and therefore improve reach and impact.

Q1: Which of the following would you describe yourself as?

- Happy
- Confident
- Clever
- Healthy
- A Good leader

What we found:

It is encouraging to see that the most popular description by young people of themselves was 'happy'. There is a lot of negative media around the happiness of young people due to the rise of social media, so it is good to see that the majority describe themselves positively.

Interestingly, there is a steady decline in young people describing themselves as 'confident' (61% at '16' down to 44% at '19').

We expect that this is caused by greater social and educational pressures meaning they are more likely to compare themselves with others who may be deemed more successful or popular.

Across all ages, of those who described themselves as 'happy', 60% also described themselves as 'confident'. This shows that whilst confidence is an important trait for interviews for college, university or employment, young people do not see confidence as a vital aspect of being happy.

'Healthy' was one of the worst performing traits which suggests that young people do not focus on living a healthy lifestyle. By not rating themselves as 'healthy' does this suggest they are aware of what 'healthy' means or that they are confused by conflicting messages around health and/or well-being?

Furthermore, those who identified themselves as either 'healthy' or 'confident' were most likely to describe themselves as



all the given options. Organisations looking to improve the lives and prospects of young people would be therefore advised to promote confidence and health improvement opportunities in young people.

When engaging with young people and developing a #TeenStrategy, it is important to understand their motivations and how these change as they grow up. To discover these motivations, we asked them the following question:

Q2: What is the most important thing to you RIGHT NOW?

- Passing exams
- Getting a job
- Enjoying life
- Getting into university
- Having a family

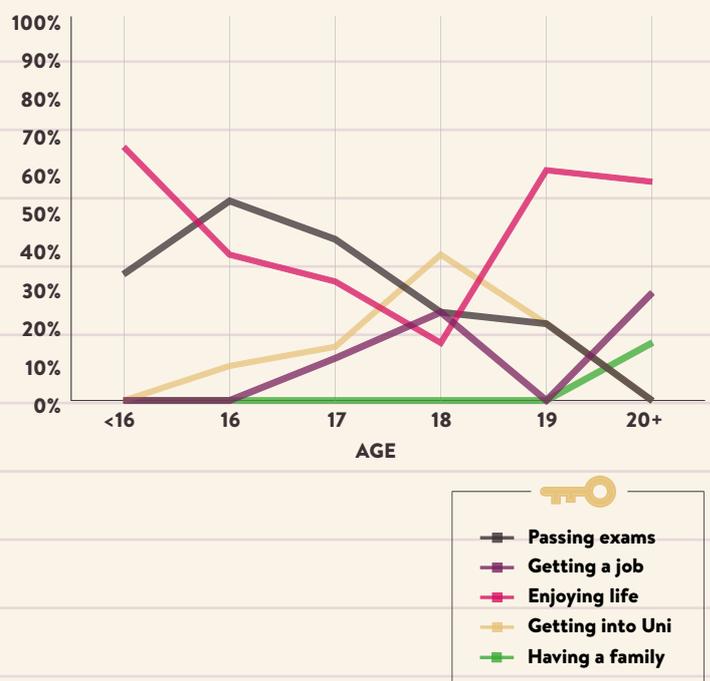
What we found:

Young people’s priorities and motivations drastically change at each age as they go through school and into further/higher education or employment. Our results show that each age comes with its own priorities and this is something that organisations looking to engage with them should consider.

At the age of 16, exams begin to take over as the most important thing. However, whilst it could be expected to see a similar rise around the age of 18 (when most young people are take A-Levels or finishing their BTECs) it is ‘getting into university’ which takes priority. Whilst exam success and university entry are intrinsically linked, evidently one takes a perceived priority over the other.

From age 18-19 there is a clear rise (45%) in the importance of enjoying life. This is the point in life where most young people have made a choice on the path they are going to take, whether to university or employment – perhaps a time to blow off a little steam as they gain more independence. Does this mean than young people only start to prioritise enjoying life once they get to eighteen?

Getting a job only becomes important around the age of 18. From other young people we have spoken to and worked with, we know this is when young people are seeking more independence and work experience to support their future prospects and plans.



By knowing what young people are searching for information on at different ages, it is possible predict the behaviour of each age group in the future. As a result we asked the following:

Q3: In the last 12 months, which of the following have you looked for information on?

- Education
- Employment
- Fitness
- Health
- Volunteering
- Charity

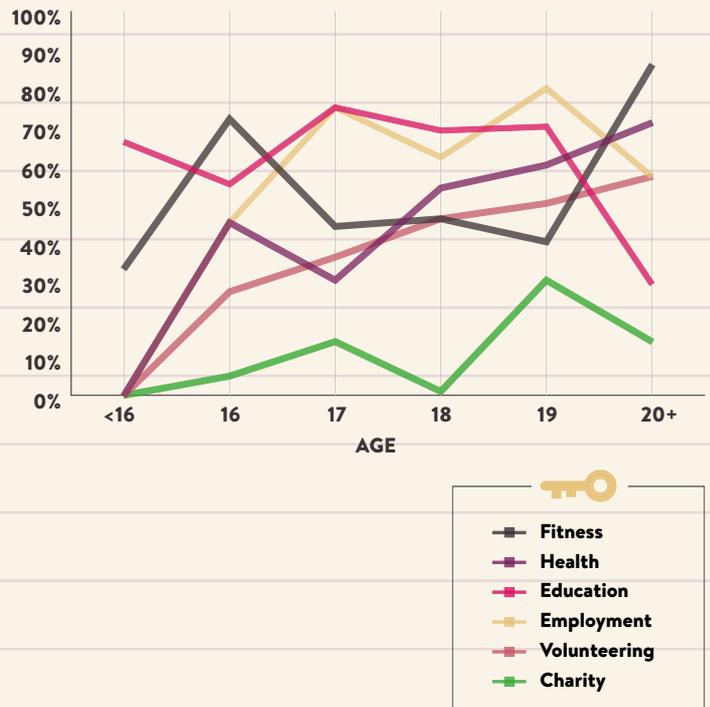
What we found:

We found that there are significant changes in the information that young people want as they pass from one stage in life (school) into the next (college, university or employment). Whilst all the topics included in the survey had importance to all ages, there were some drastic changes from year to year.

Education Post 16 there is a 20% increase in the search for education information. This aligns with the time most young people who are thinking about University will begin to explore their options and decide on courses/ establishments. At the age of 18, this drops by a small amount when most young people will have decided on their immediate future. Surprisingly, this stays at a similar level at the age of 19 where we would expect most people to be either at university or in employment – this shows that young people are still looking for information even once a decision has been made. (This could be aligned with research from The Guardian: 1 in 10 students drop out of University in their first year.)

Employment As young people take new steps in their life they gain a new sense of independence. They can try new experiences and go to new places, most of which cost money. This need for more personal income is reflected in spikes of interest in employment around 17 (75%) and 19 (80%). This shows that if a young person is going to look for employment, it is likely at a new stage in their life, rather than in the middle of one. (E.g. a young person will be more likely to look for a job at the start of college, rather than during their second year).

Volunteering & charity As we would have expected, ‘volunteering’ and ‘charity’



searches are the worst performing subjects overall, with 'charity' only seeing a real increase at age 19 (30%). Volunteering, however, sees a steady increase as young people get older. This is due to the growing importance of adding to their CV or personal statement to improve their future opportunities. At age 16 volunteering is at its lowest point of 27%. We believe this is because volunteering at this age is pushed by influencers such as parents or teachers and therefore doesn't require young people to actively search for information.

Fitness & health At the age of 16, the most popular search term is 'fitness'. This correlates strongly with young people not describing themselves as 'healthy'. However, as their self-perceived health increases, their desire for new information decreases. This may also be because important things such as exams and employment take priority. Also, their desire for information around health hits a low of 30% at age 17, but spikes significantly at age 19. Once again we believe this to be due to them having more time to spend on 'enjoying life' rather than passing exams or getting a job.

To further support any predictions about what young people may be interested in in the short term we investigated what they think they will search for in the next 12 months.

Q4: In the next 12 months, which of the following do you think you will search for information on?

- Education
- Employment
- Fitness
- Health
- Volunteering
- Charity

What we found:

The information which young people expected to search for in the next 12 months correlated strongly with the actual search terms from the previous question in all areas other than 'fitness'.

Education As expected, there is a steady increase in interest in education information from 16-17 years old (55-64%) as young people decide on their next steps in life. Once this decision is made there is a



significant drop from 64% to 38% at age 18 where 'employment' and 'health' are more important.

Employment The biggest spike in interest in employment is at age 17. This comes at a time when most young people are starting college and beginning to develop the sense of independence and the need for more income to support their interests. Surprisingly the desire for information around employment declines slightly post 18 from 69% to 60%. This may be because they are still in the same employment from the age of 17 or in full time education at University where some people do not want to take on a part-time job to focus on their studies.

Volunteering & Charity The patterns for both volunteering and charity reflect accurately the actual search terms found in the previous graph. This shows that young people are aware of the role that volunteering and charity plays in the development of their skills and experience. Whilst these are low compared with other subjects, they are very much on the radar and improving awareness of these subjects could be a worthwhile activity.

Fitness & Health There is again an increase in the expected desire for 'fitness' and health related information from age 16-19 (36% & 41% to 50% & 60%, respectively). This correlates with the desire to begin enjoying life more.

These trends, when compared with the search trends for the previous 12 months, show that young people are very aware of what is to come and how they need to be prepared for the next stage of their journey. To capitalise on this awareness, organisations should create content which engages with young people 12 months before they are ready/expected to make a decision.

There is a large amount of competition from universities, apprenticeship providers and employment organisations to increase their intake. With more competition, it is important to understand young people's attitudes to each of these. By understanding this, organisations can develop campaigns which address any negative thoughts young people may have and sway them to consider an alternative decision.

Q5: Which of the following routes do you think will provide you with the best chance of getting a job?

- Apprenticeship
- Relevant degree
- Any degree
- Work experience
- Other

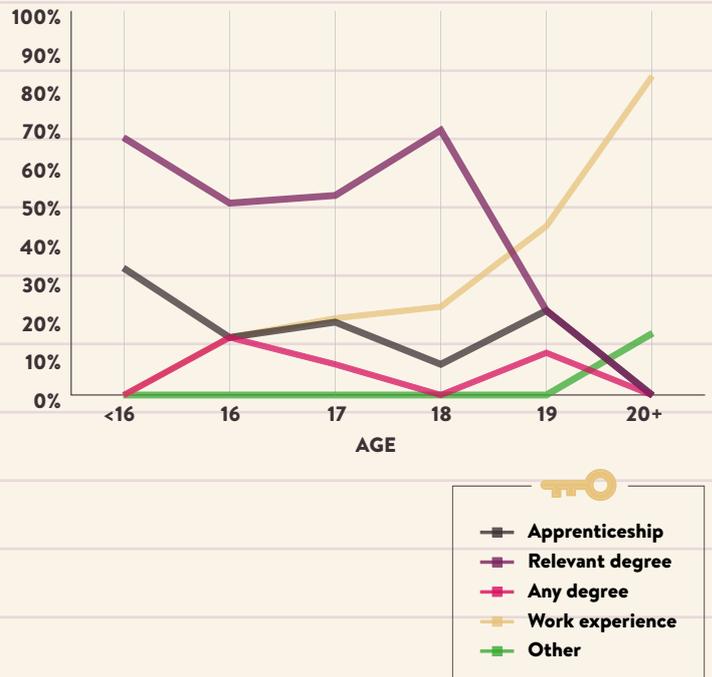
What we found:

As expected young people aged 16-18 see university as their best option for getting a great job, however this significantly drops from 69% to 22% post-18. Is this because most young people will have made the decision on their career path by the age of 19 and will therefore know what is best for them in their opinion or is it because they are seeing friends gaining employment or they are beginning to realise that getting a job is going to be difficult and that they will need to complement their degree with relevant work experience?

Despite being widely communicated by schools, the importance of work experience only begins to climb rapidly around age 18 where it rises from 23% to 44% at 19. From experience, this is the age that young people begin to apply for jobs and complete their personal statements where it is important to demonstrate work experience. This also supports the adage of “How are you supposed to get work experience if you can’t get a job?” A take away message for this would be to encourage young people to enter some form of employment at as young an age as possible to help reinforce the importance of work experience.

In recent years, in line with government agendas, there has been a large increase in the demand for apprentices and the amount of marketing activity surrounding this has increased significantly. However, from our survey results we can see that this has been largely ineffective in persuading young people aged 16-18 that an apprenticeship is a viable option for a great career (8-19%).

One of the key aspects of an apprenticeship is that an apprentice will learn on the job by gaining training and work experience at the same time. When combined, apprenticeships and work-experience have a rating of 66% at age 19. Focusing on this aspect when recruiting for apprentices at age 19 may have significant benefits.



These trends, when matched against young people’s influencers, suggest that teachers/ tutors and parents are not communicating the positive aspects of apprenticeships as much as they do for the university pathway. Whilst we see from our work with schools that work experience is being promoted heavily, the importance isn’t felt by young people until they reach 19 years old as it begins to impact on their opportunities in real terms.

Selling a young person on the decision to go to university, undertake an apprenticeship or go straight into full-time work requires organisations to understand young people’s motivations. But what are young people looking for from a future job?

Q6: What are you looking for in a future job?

- Security
- Enjoyment
- Flexible hours
- Near home
- High paying
- Don’t know

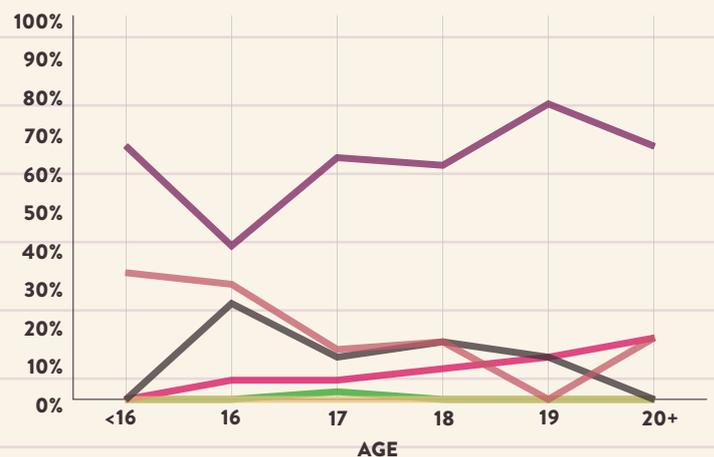
What we found:

Far and away the most important factor for a future career for young people was ‘enjoyment’, with ‘location’ and ‘long-term security’ being significantly lower than many might expect.

There is also a low importance placed on a job being ‘high paying’, declining from a high of 30% at 16, to a low of 0% at 19 years old. In comparison, ‘long-term security’ follows a similar path from age 16 where it drops from 25% to 0% at age 20+.

Also, we might have presumed long-term security to have been an important factor, whereas the results show that young people’s views range from 0% to 25%. It seems that messages from the media and young people’s role models around having a ‘fulfilling career’ seem to have had an impact on young people’s perceptions.

This may have a large impact on any future recruitment drives for college leavers and university graduates and give a clear focus for future employment campaigns. This focus on ‘enjoyment’ may also be a key factor in helping other sectors gain ground on Universities as the best choice for a great career.



Understanding their influencers and how they search for information

Young people will both search for, and be given, information. They are more likely to search on topics they know about or are interested in, whilst information around new topics is often pushed to them by influencers such as parents, teachers or family members and friends.

By understanding both who these influencers are at each age, and how young people independently search for information we can ensure that young people are receiving the right information at the right time from the right source.

As with any age group, influencers play a huge role in the decision-making process for young people. Understanding a young person's main influencers can help improve the communication process.

Q7: Whose judgement would you MOST TRUST to make a recommendation that could improve your future opportunities?

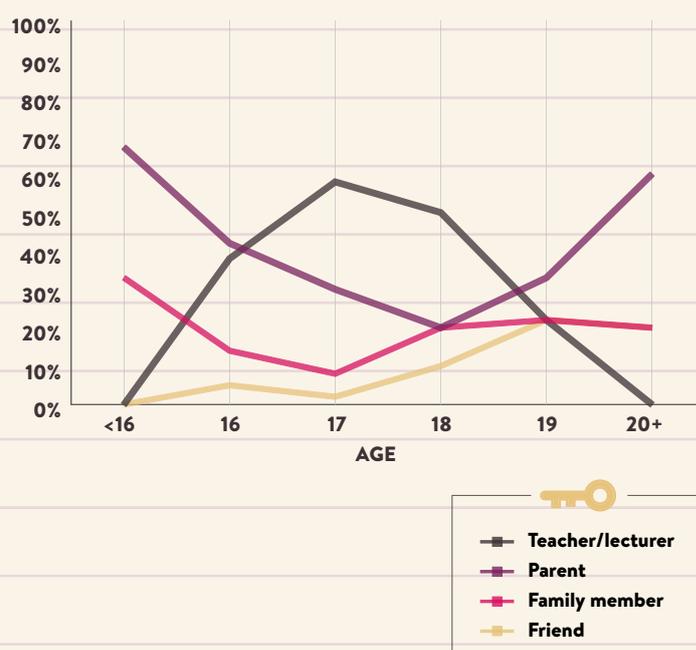
- Teacher/lecturer
- Parent
- Family member
- Friend

What we found:

Here we see that the role of a parent versus a teacher or lecturer is inverted almost exactly at each age. The biggest shift we see is at the age of 16 where the role of the parent begins to dramatically decrease from 67% to 20% at the age of 18. Conversely the role of a teacher or lecturer increases from 0% to 58% at the age of 17. This shows a clear switch in the key influencer from a young person's perspective during their college years (16-18).

From speaking with young people, we believe this change in influencer is because the decisions are often on topics such as employment or education, which young people believe teachers are better placed to support them with. It is therefore vital that any organisation looking to engage with this age group includes teachers/tutors in any **#TeenStrategy**.

This change in influencer was then reversed by age 19 due to less access to tutors (young people not in education and a less 'pastoral' role of university lecturers) and better relationships with parents.



Interestingly the role of a friend began to increase from age 17-19 (2%-22%). We believe this is because young people's friends may have made similar decisions or sought similar guidance and are therefore well placed to give relevant feedback.

Whilst young people develop an increasing level of independence, they still look to influencers to help them make important decisions in all areas of life. Knowing a young person's key influencer at various touch points in their life enables us to communicate messages through several channels.

From experience, we believe that if we were to investigate the correlation between the type of influencer and the type of decision, we would also find that different decisions would include different influencers! However we still expect the most important decisions would still be made in conjunction with teachers/lecturers and parents. An area to explore for our next survey perhaps?

Whilst influencers often make recommendations, young people will also search for information themselves to help support any decision.

Q8: How will you search for information?

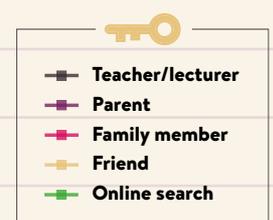
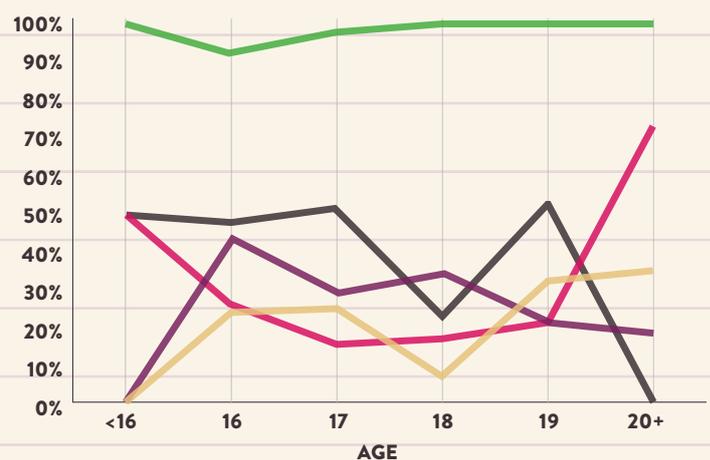
- Online search
- Teacher/lecturer
- Parent
- Family member
- Friend

What we found:

As expected, the key tool for information searches is 'online' with 90-100% of young people using an online search tool. However, most interestingly their second source of information correlates with their key influencer, with teacher/tutor being the second most likely source of information at all ages other than 17 and 20+.

Parents play an important role around the age of 16 with a spike from 0% to 42%, whilst family members play a decreasing role from the age of 16 onwards (from 50% to a maximum of 20% around age 19).

Again, we would expect that different types of information being searched for would affect the source of information. For example, very specific information around



a career path may result in a teacher/tutor being asked, whereas information on local job opportunities may use an online search.

The term 'online search' is quite broad, so we wanted to know what this meant for each age group.

Q9: Where will you search online?

- **Known website**
- **Search engine**
- **Facebook**
- **Twitter**
- **YouTube**

What we found:

As expected, search engines were used most by all ages, however interestingly at the age of 16 there was a significant drop (100% - 14%) which was mirrored by an increase in young people using known websites to find information. We believe this is also linked with their increasing levels of independence as they search for previously unknown opportunities and experiences, and develop a further sense of self as they discover new interests.

The influence of 'known websites' is also larger than we might expect which demonstrates the importance of organisations creating awareness of their website if they want to directly engage young people with their products and services.

YouTube, whilst not classed as a search engine, processes over 3 billion searches per month, more than Bing, Yahoo!, Ask and AOL combined. However, this research suggests it is not used as frequently in the search for new information. From experience YouTube is used more to search for additional information on a topic young people are already interested in such as hobbies and pastimes or music and entertainment.



A lot of effort from organisations often goes into ensuring that information is freely available on their social media pages, however young people are not using social media to search for the types of information surveyed. Of the social media included, Facebook was the most popular for searching for information, peaking at 25% of young people at age 19. Therefore, organisations should not write off social media completely, but ensure that information is also freely available on their website and ranks highly on search engines.

In recent years there has been a boom in the number of different social media channels available to users and each has their own unique use that determines the way users engage and communicate on each platform. Instagram is image heavy, whilst Twitter only allows users 140 characters per post to make sure content is snappy and digestible. These variety of uses means organisations need to have a multi-platform approach to social media – but knowing where to focus efforts is vital in maximising ROI.

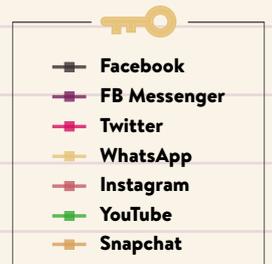
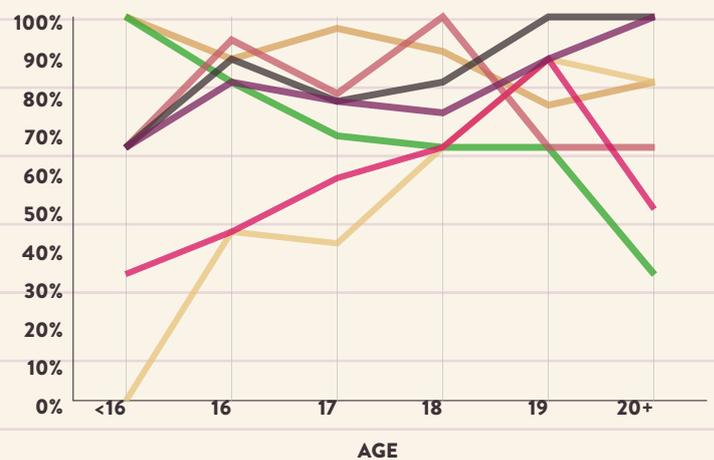
Q10: “Which of the following social media have you used in the last 24 hours?”

- Facebook
- Facebook Messenger
- Twitter
- WhatsApp
- Instagram
- YouTube
- Snapchat

What we found:

Young people all use a wide range of social media and there is no longer one ‘go to’ platform where they can get all their information and engagement. There are clear trends in the popularity of platforms across ages and whilst many might expect the landscape to look similar for a 16 or a 19 year old, the truth is actually somewhat different.

Facebook In 16-18 year olds, Facebook’s dominance has reduced as platforms such as Instagram and Snapchat have gained ground. However, at age 19, Facebook is still the most popular platform, with 100% of respondents using it within the last 24 hours. Interestingly, Facebook is also the most used messenger service across all ages apart from 19 year



olds who use WhatsApp in equal measure. Therefore, if you are aiming a campaign at older teens, Facebook is still the top selection.

Instagram and Snapchat Young people have access to more, high quality, portable technology than ever before. With mobile phones now boasting cameras with upwards of 10 mega pixels, along with the reduced cost of data usage on cellular networks, image-led social media such as Instagram and Snapchat have had a meteoric rise in recent years (In 2012 Facebook bought Instagram for \$1bn and now has a value of over \$50bn). We expect this trend to continue and therefore it is vital that organisations looking to engage young people take advantage of this by developing a clear, content led strategy on these platforms (with detailed information available online as previously mentioned).

Twitter & WhatsApp WhatsApp sees a significant rise in usage from 17-19 year old respondents. From experience this is due to the growth of social circles and the need to organise events and meet-ups, previously arranged by parents. Some young people mentioned that their 'group messages' were mainly through WhatsApp and were set up to organise a single event and have been used as general 'chat' groups since. Twitter also sees a rise across these age ranges as young people seek to engage more directly with brands and stay up to date with current affairs.

In summary

When embarking on your next youth engagement project it is vital to consider these three areas which will give you a strong foundation for any strategy or activity:

- 1. Young people's mindset**
- 2. Influencers and how young people receive and search for information**
- 3. Favoured communication channels**

Using our **#TeenStrategy** we use our experience and expertise to successfully position products and services so that we communicate the correct messages to the correct influencers using the correct channels. It is important to understand that influencers won't just automatically pass your message on as there are many competing brands and organisations looking to engage with teens in their care.

Influencers have their own mindset and motivation, ways of searching and receiving information and their own preferred communication channels. At Fourteen19® we have vast experience in successfully communicating with influencer audiences to disseminate information to a teen audience. To find out how Fourteen19®'s experience and expertise in engaging influencers can help your next Youth Engagement campaign, please get in touch today.

For further support with your next youth engagement project, contact **Fourteen19®** to see how we could use our experience and expertise to develop a **#TeenStrategy** which could **unlock access to 5 million young people in the UK** and significantly improve your return on investment.

Continue reading to see our additional findings in Part Two.

#TeenSurvey 2017

#TeenStrategy

Revised October 2017

Methodology

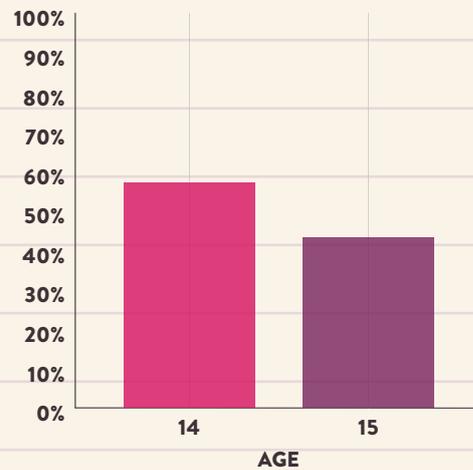
Following the release of #TeenSurvey 2017 we received fantastic feedback from brands and organisations across the country who wanted to know more. The main questions we got asked were:

- **What about younger teens in the 14/15 age range?**
- **Who are teens most influenced by for other areas of interest?**

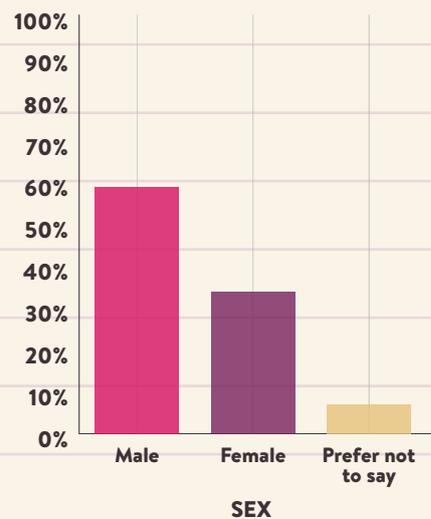
To conduct Part 2 of the #TeenSurvey we sourced 100 young people aged 14-15 from a variety of schools and community groups who took part in a HybridQQ® research session. The participants completed an online quantitative questionnaire, the results of which were then brought up on screen and discussed in detail to obtain qualitative feedback. Answers from the quantitative survey are shown in the graphs for each question, whilst additional qualitative information may be found in the narrative.

Who we asked:

How old are you?



What sex are you?



Getting into the mindset of young people

Q11: How strongly would you use the following words to describe yourself?

- Happy
- Confident
- Clever
- Healthy
- A Good leader

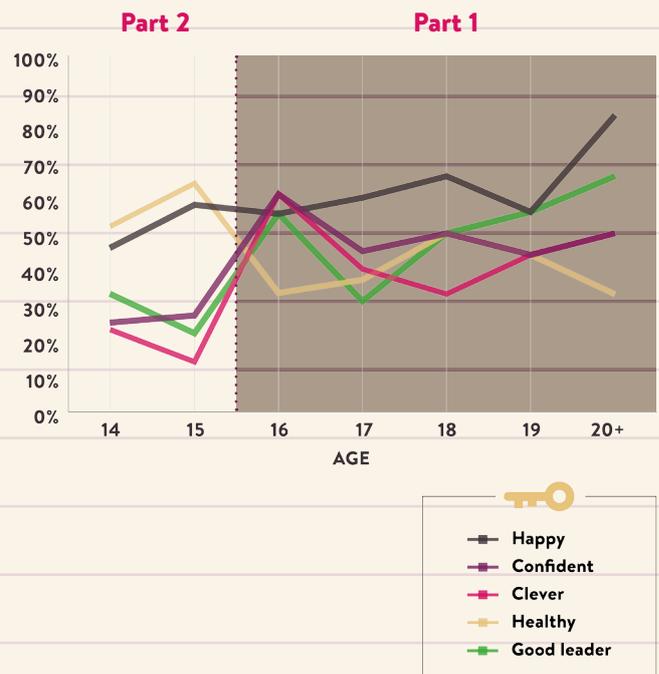
What we found:

Encouragingly young people tended to associate themselves more closely and strongly with ‘positive’ words, with ‘friendly’, ‘active’ & ‘sociable’ being the most common.

An important factor for young people when engaging with a new experience is ‘confidence’, which performed as one of the lowest descriptors. Only 27% of 14-15s described themselves strongly/very strongly as ‘confident’ – this suggests that whilst young people may have the attributes to be confident, being comfortable enough to put them into practice may be difficult.

We found that over half (57%) of 14-15s also strongly/very strongly described themselves as ‘independent’ – something we outlined as another important factor when engaging with a new experience. Whilst this is an encouraging figure, it also shows that 43% of young people don’t see themselves as independent. When asked, this was down to several reasons, including: “lack of funds”, “reliance on parents for transport” and “lack of freedom”.

From a physical activity viewpoint, young people seeing themselves as ‘lazy’ or ‘active’ appears quite polarised, with 52% and 60% respectively. What this data doesn’t tell us is if they are lazy or active, only that they perceive themselves to be.



Q12: How important are the following things in your life right now?

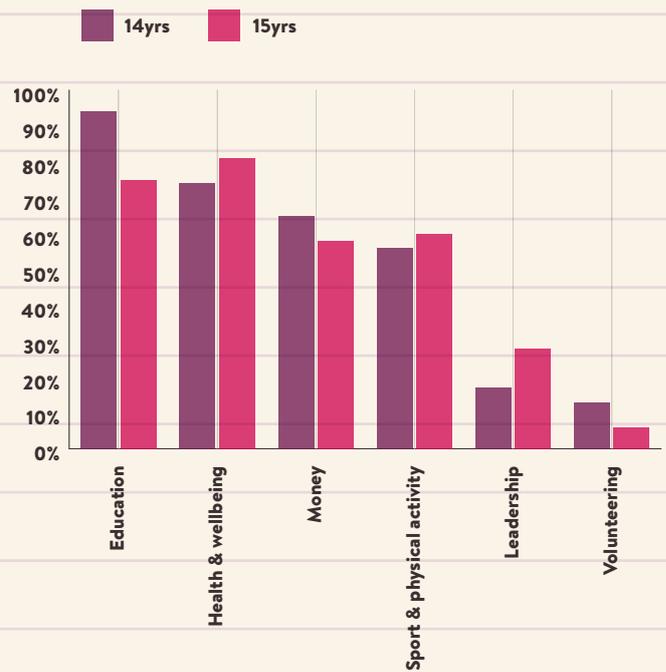
- Education
- Employment
- Fitness
- Health
- Volunteering
- Charity

What we found:

Education is still the most important thing in a young person’s life, even prior to GCSE exams. 85% of young people aged 14-15 said that Education was ‘very important’ or ‘extremely important’. This is because that although they might not have GCSE exams in the next 12 months, they are beginning to prepare for them from a younger age and the importance of succeeding in them is being instilled by teachers and parents.

Where ‘money’ was concerned, an interesting trend was that young people hold it in a higher regard than we have previously found. Upon examination, we discovered that this was because young people “don’t have a lot of it” and “work hard to get it”, therefore their perceived value of it is higher – this being said, they were reluctant to part with it and said they would “rather do something for free and save money for something special”.

Worryingly, both Leadership & Volunteering performed poorly, with only 23% and 9%, respectively, of 14-15 year olds seeing them as ‘very important’ or ‘extremely important’. Whilst, as adults, we know that the skills and experience gained from these kinds of activities are vital for our professional and social development, perhaps these benefits could be better communicated to young people, or better aligned to their interests and current mind-set.



Understanding their influencers and how they search for information

Q13: Whose judgement would you most trust to make a recommendation that could improve your current life/future opportunities?

- **Teacher/lecturer**
- **Parent**
- **Family member**
- **Friend**
- **Social media personality**

What we found:

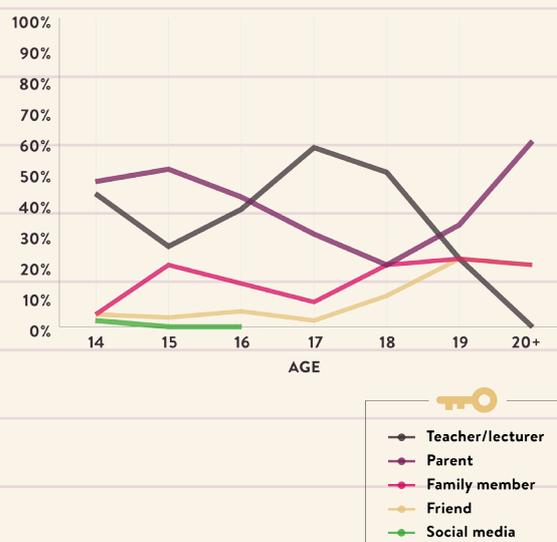
In line with our previous findings from 16-20+ year olds, parents play a more influential role when the young the person is looking for support with something to improve their current life. With a high of 65% of 14 year olds deeming their parents as most trustworthy, falling to 57% at the age of 15 (and continuing to fall to as low as 25% at the age of 18).

This shows that around the mid-teen years, despite often frosty relationships, young people still see their parents as the 'go to' source for information and support. It is therefore vital that organisations wishing to engage with this younger age group also focus some effort on aligning their communications with the motivations & needs of parents.

When asked, the consensus from the young people was that "parents know them best and have their best interests at heart."

However, when asked about looking for support for something that would improve their future opportunities, teachers began to play a more influential role.

Whilst parents were still seen as most influential/trustworthy (61% across 14-15 year olds) the role of teachers drastically increased from 7% to 36%. This was because teachers "have seen dozens of young people like me, so can use that experience". Also, "Parents would do what would have been best for them, not for their child." We found this quite profound that young people would have this level of awareness of the motivations of their influencers – something that organisations should consider, in that young people don't just take parents/teachers advice as 'the law'.



Q14: Whose judgement would you most trust to make a recommendation about the following things?

Interestingly, in a world where social media influencer marketing is growing exponentially, young people don't look to the people they follow for advice on "serious" issues like education or employment. These influencers play a more active role in influencing around topics like fashion or music. However, young people were also becoming more aware of social media personalities being paid to promote goods that they may not believe in and were more likely to trust an unpaid recommendation or a recommendation from a person with a smaller following.

Topic	1st Option	2nd Option	3rd Option
Education	Teacher (78%)	Parent (18%)	
Employment	Parent (57%)	Teacher (32%)	
Sport/Physical activity	Teacher (29%)	Parent (24%)	Friend (23%)
Volunteering	Parent (30%)	Teacher (24%)	Family Member (16%)
Politics	Parent (32%)	Teacher & Family (23%)	Social Media (18%)
Health & well-being	Parent (63%)	Teacher (20%)	
Music	Friend (49%)	Social Media (24%)	
Money	Parent (87%)		
Fashion	Friend (43%)	Social Media (30%)	
Transport	Parent (86%)		

What we found:

We found that the person that young people trusted the most varied drastically by topic and that the perceived importance of the decision correlated somewhat with the ‘closeness’ of a relationship or the level of knowledge required to make a decision.

For example, where education was concerned, teachers and parents made up a combined 96% of the influencer picture. Whilst on the other hand, 73% of the influencer picture for things such as music or fashion was made up of friends and social media personalities/celebrities.

These findings are particularly interesting in a world where social media and celebrity influencer marketing is such a huge industry. It has its place, but we would advise brands and organisations in certain sectors to think twice about dedicating a large amount of a project budget to paid promotion activity.

To gain an overview of how influencers might vary by sector, we have grouped them in the table below:

Entertainment	Education/ Employment	Health & Wellbeing	Miscellaneous
Music – friend (49%) Fashion –friend (43%)	Education – Teacher (78%) Employment – Parent (57%) Volunteering – Parent (34%) Money – Parent (87%)	Sport/Physical activity – Teacher (29%) Health & wellbeing – Parent (63%)	Transport – Parent (86%) Politics – Parent (32%)

Q15: Which of the following social media platforms have you used in the last 24 hours?

- Facebook
- FB Messenger
- Twitter
- WhatsApp
- Instagram
- YouTube
- Snapchat

What we found:

In contrast with 16-20 year olds, the use of Facebook daily amongst 14-15 year olds has dramatically fallen, with only 57% of respondents saying they had used Facebook in the last 24 hours, compared with 90% of 16 year olds. However, all but one of the respondents did have an active Facebook account.

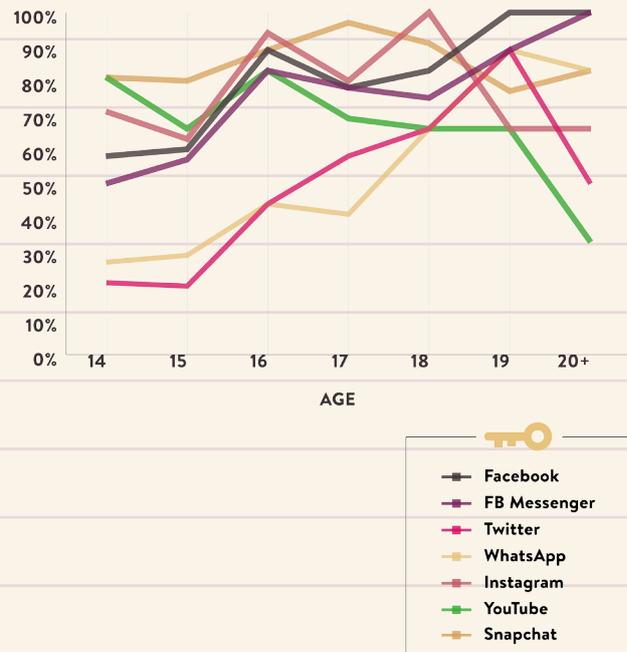
For this age group, their preferred social media platform is Snapchat, with 80% using it daily. Under investigation, we found that Snapchat was more popular than even SMS messaging for individual conversations and group messages.

YouTube and Instagram were the next most popular, with 75% and 67% daily use, respectively. YouTube was mainly used for listening to music or following specific interests such as gaming, fitness or cookery, whilst Instagram was used for following celebrities and was their main platform for sharing 'worthwhile' content.

In this age group, the use of Instagram was lower than older age groups and the young people put this down to "not doing anything exciting" that older teens might have done (i.e. nights out, holidays with friends). This aligns with the lack of freedom and money to do 'exciting' things regularly that they deemed worthy to post on social media for more than 24 hours (as per Snapchat).

It is also worth noting that YouTube was mainly used for consuming content rather than engaging with brands or other young people.

In contrast to previous years, the worry around the cost of mobile data was much lower, with many respondents saying they had 'enough' with their plan or that Wi-Fi was available in most places. Those that didn't



have 'enough' data were savvy with how to save it and looked to use Wi-Fi or download content in advance to watch/consume later.

During the qualitative part of the research sessions we explored the world of Snapchat 'Streaks'. A streak is where you and a contact send each other a 'Snap' at least once every 24 hours and the streak count goes up for each day in a row - miss a day and lose the streak! Whilst it's not unusual for young people to develop their own trends on a platform, it's often easy to understand why these develop.

However, with streaks no young person was able to explain why a long streak was so important (one participant even went to the lengths of giving a friend their log in details whilst they went on holiday as they knew they wouldn't have data!). We put this down to teens' need for validation, just like the desire for Facebook/Instagram 'likes'. This is their way of demonstrating long lasting friendships at an age where social circles can be quite fickle.

Find out more...

To find out more about engaging with one of teens' key influencers, we've also been conducting a **#TeacherSurvey** which will be released soon! Get in touch to pre-order your copy.

Got a question for **#TeenSurvey 2018**?
Let us know!

Interested in a survey specific to your organisation?

Hybrid QQ[®], our revolutionary approach to insight, combines quantitative and qualitative research techniques and enables us to collect visceral data and anecdotal evidence that informs and underpins understanding and subsequent activity.

Get in touch to find out how we can help your organisation to better understand young people.

Please direct all enquiries to:

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