

Vodafone Institute Survey

Talking about a Revolution: Europe's Young Generation on Their Opportunities in a Digitised World – A Study Across Six European Countries

YouGov Survey Commissioned by the Vodafone Institute for Society and Communications

EUROPE | EDUCATION | LABOUR MARKET | WORK | DIGITAL SKILLS | ENTREPRENEURSHIP | DIGITISATION



**Vodafone Institute
for Society
and Communications**



digitising europe

4 December 2014

International Summit on the Digital Transformation of
Education and Employment in the Age of Connectivity

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Foreword

Digital technologies and their manifold applications hold great potential for future growth. The growth prospects of the digital sector are particularly important for Europe. But one thing should be clear: economic prosperity through digital transformation won't happen by itself. Politics, businesses and civil society need to create the framework that promotes digital growth and opens up new forms of learning, working and living. The year 2014 might not feel much different than the year 2010 for many of us, but the changes driven by digital technology have been significant within the last couple of years. The digital future is here. And there is no doubt that in the years ahead, the digital disruption will be felt by more people in more places. Europe must respond.

The Vodafone Institute Survey provides a comprehensive overview on how young adults in Europe think about education and work in the light of the digital revolution. For the first time, the generation which suffers most from unemployment and a struggling economy in many countries is telling their side of the story. And we all should listen as this is the generation whose professional perspectives depend significantly on the digital revolution.

Although results from our survey suggest that many of the young Europeans share a rather optimistic view on their future, there are considerable differences between countries. Only 23% of young Italians are convinced that they will have a better life than their parents, while 40% of the Dutch respondents think so. Young Italians and Spaniards seem to see the chances of a digitalised labour market more often than their peers in other countries. In the light of current economic developments this might be mainly driven by the goal to find a job in general.

Another figure is striking: Only 13% of young adults in Germany would definitely be willing to pursue a career in the area of digital information and communication technologies. This is the lowest number in all six surveyed countries. In addition, 33% of respondents in Germany are "definitely" not willing to go into the ICT area. Numbers for the United Kingdom are just as low. There seems to be some kind of tiredness for the digital revolution before it even started. But how can Europe win over its citizens in these disruptive times if even the digital natives can not get enthusiastic about it?

Overall, this Vodafone Institute Survey shows clearly that Europe must embrace digital skill building with even more confidence and fervor to get ready for the digital revolution. Pragmatic optimism needs to take the place of concern and uncertainty. The role of the political sphere, business and civil society is to act together to make this digital revolution a success story for Europe.

Dr David Deissner

Director Strategy & Programs,
Vodafone Institute for Society and Communications

Jochen Kluve, Professor of Empirical Labor Economics, Humboldt-Universität zu Berlin and RWI: “Europe’s young generation”

The Vodafone Institute and YouGov present a major achievement: A representative survey of European youths in selected countries that comprehensively covers many aspects of their life, including their educational and occupational situation, their views on the future, their attitudes towards ICT and the digital revolution. This effort is more than welcome and the results comprise a fascinating array of themes.

A multifaceted picture of Europe’s young generation

Overall, the findings of the survey implemented by the Vodafone Institute and YouGov show a multifaceted picture of young people aged 18 to 30 years across Europe. Focusing on six key countries – the Czech Republic, Germany, Italy, the Netherlands, Spain and the UK – the results indicate, for instance, that in Germany, the UK and the Czech Republic a substantial share of young people are in full-time employment, whereas in Spain and Italy a large share of youths are students. Clearly these findings reflect the current labor market situation in the specific countries to a large extent – but at the same time the survey finds that regardless of the labor market situation the majority of young people choose to pursue explicitly that field of work they are most interested in. This is certainly an encouraging result.

Among the many other interesting findings of the survey several facts deserve to be highlighted. First, across countries about one in five youths has already spent time living abroad. That is, a substantial share of youths has grown up to be a mobile European citizen. Second, the general view of their future is optimistic, with the strongest expression among Dutch young people, and the most skeptical one among Italians. The latter, along with

the Spanish and Czech youths, also tend to think that future opportunities are better abroad than in their own country. Again it seems likely that these views – at least partly – reflect the current economic situation in the youths’ home countries. Third, European youths recognize the importance of ICT skills, in particular their increasing relevance for jobs in the future economy. About 10 per cent of those youths currently in education are being trained in Information and Communication Technologies, a notable fraction. Moreover, for one third of the surveyed youths ICT is a main aspect of everyday life: These are the youths that explicitly strongly agree with the statement “Digital technologies are an integral and important part of my life”.

Differential perspectives on the future

This comment complements the results of the survey by looking specifically at the determinants of young people’s expectations. In the survey, youths were asked to answer the question “Taking all aspects of your life into account, how do you feel about the future?” on a scale from 0 (very pessimistic) to 10 (very optimistic). This subjective assessment can be correlated with several explanatory factors such as gender, age, educational background, etc., to investigate whether certain characteristics systematically predict future expectations.

A strong pattern across all countries is that younger ages among the surveyed group are significantly more optimistic, as are people with higher levels of education and people who have lived abroad before. Also, youths for whom ICT plays a decisive role in their everyday life (as defined above) are significantly more likely to report a brighter view of the future. At the same time, across

all countries the fact of being currently unemployed is the single strongest predictor for having a pessimistic view of the future.

An interesting country pattern arises looking at future expectations by gender: in some countries – the Netherlands, Spain, and Italy – but not in others – Germany, Czech Republic, the UK – women are significantly more likely to express pessimistic expectations than men. Whether this expresses cultural factors, labor market outlooks, a mixture of both or other factors cannot be clarified using the available data. Moreover, in the UK, Spain and Italy youths who are still living with their parents are significantly more pessimistic than their counterparts who live on their own or with a partner. Finally, the fact whether a young person lives in an urban or rural context has no influence on their perception of the future in any of the countries in the sample.

Feeling prepared through education?

An analysis of the perceived utility of education can be undertaken using the subsample of youths who are currently in education (57 per cent of the youths in the survey). In a first question, youths were asked “how confident are you that you will find a job [in your field of education] after you finish your studies/vocational training?”, answering on a scale from 0 (not confident at all) to 10 (very confident). Across all countries (with the exception of Germany) young women are systematically less confident about finding a job in their field of education than men. Again, the pattern is particularly strong in the Netherlands, Spain, and Italy. Also, the younger age group reports higher confidence in finding a well-fitting job in Germany, Spain, and Italy. Whereas studying an ICT subject generally has no influence on the perceived chances of a suitable job match, those youths with more comprehensive everyday ICT use report significantly higher confidence in finding adequate employment in Germany, Spain, and the Czech Republic. Regional factors (urban vs. rural) and whether a young person still lives at home generally do not seem to affect the degree of confidence of finding a job that matches the youths’ education.

In a second question, youths were asked “how well do you think does your education [...] prepare you for working in a job in that area?”, ranging from 0 (very poor) to 10 (excellent). This question allows a comparative analysis of youths’ subjective assessment of the education system. It is notable that – quite different from the patterns seen above – there is no difference in the answers to this question between male and female youths in any of the

countries in the survey. That is, while female students frequently are skeptical about their future chances in general and their own employment opportunities in particular, there is no male-female differential in the perception of the capacities of the system that educates them. Looking at countries, Dutch youths feel by far the best prepared by their education, while Italian youths feel the least well-prepared. Generally, the older age group among those still in education feels less well-prepared for their jobs than those in earlier stages of their education (significant in Germany, Spain, Italy, and Czech Republic). Besides that, no strong patterns emerge, with some indication that students in ICT (Spain) and youths who are regular ICT users (Germany, UK, Italy, Spain) feel better prepared by their current education for their future jobs.

Jochen Kluve



is Professor of Empirical Labor Economics at Humboldt-Universität zu Berlin. Since 2007 he has also been Head of the Berlin Office of RWI, an economics think tank. Previously, he was head of the labor markets unit at RWI. From 2001 until 2003 he worked as lecturer and post-doctoral researcher at the Department of Economics, UC Berkeley. Jochen Kluve studied economics in Heidelberg, Amsterdam and Dublin, and holds a PhD from Universität Heidelberg. He has worked extensively on the evaluation of Active Labor Market Programs, with a focus on youths, as well as other topics in labor policy and methodological issues in impact evaluation. Jochen Kluve has worked on projects and as a consultant for the World Bank, the Inter-American Development Bank, the German International Cooperation (GIZ), the European Commission, the Governments of Mexico and Catalunya, and the German Federal Government. His work has been published e.g. in the *Economic Journal*, *Labour Economics*, the *Journal of the Royal Statistical Society (Series A)*, the *Journal of Applied Econometrics*, and the *Journal of Development Effectiveness*.

Methodology

Conducted by



Online survey of people between 18 and 30 years in the Czech Republic, Germany, Italy, the Netherlands, Spain, United Kingdom (results for Ireland, Portugal, Turkey will follow)

Representative quotas and weights on age, gender, and region

Length of interview:

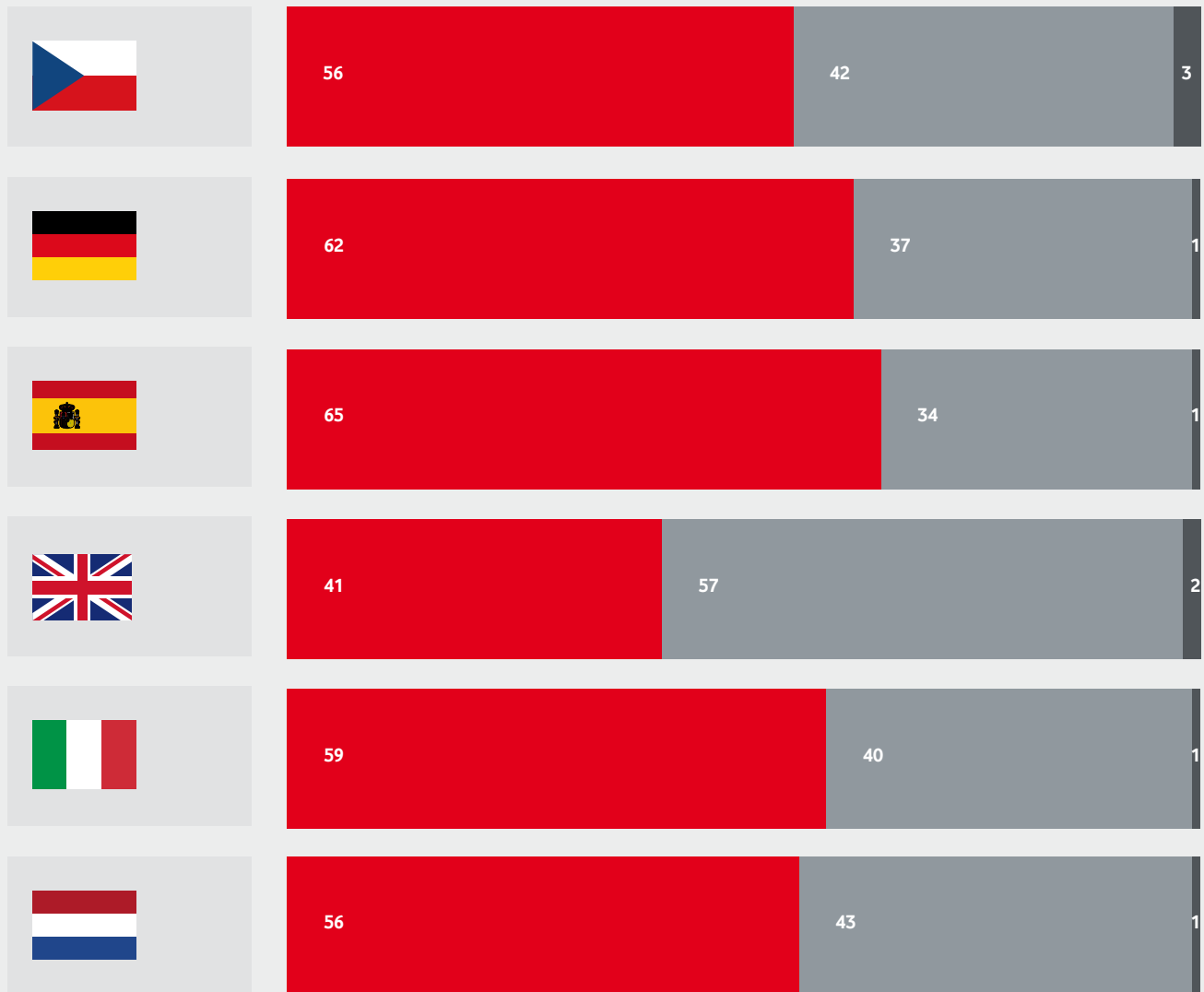
18–22 minutes

Fieldwork:

8 October to 10 October 2014

Chapter 1

Are you currently undergoing education, e.g. in school or university?



All respondents;
n=1000-1047

Yes No Don't know/No answer

➔ Across all countries, 40 – 60% of respondents are still in education, e.g. school or university.

Across all countries, young people primarily chose their fields of education/vocational training because they were interested in the respective field of work and thus hoped to find an interesting job. Young Germans and Czechs stand out in that they consider future payment more often in their educational choice than others (28% and 27% vs. 14% to 20%). (See country reports for details, chapter 1.)

Chapter 2

Out of what reasons did you apply for/choose your current job?
Please tick the three most important reasons.



Respondents who are employed; n=350-642

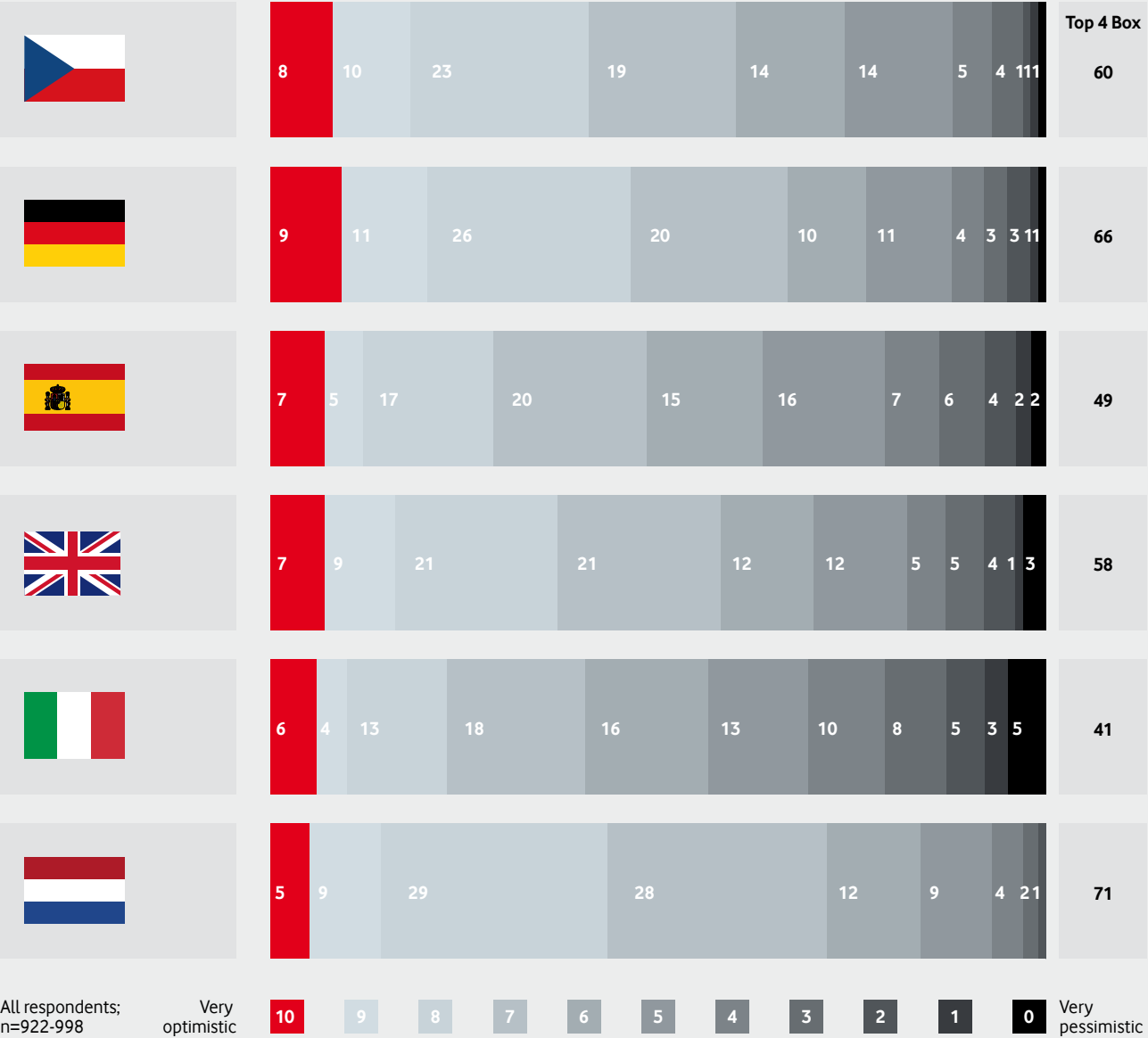


Across all countries, the majority of young Europeans chooses their field of work due to their personal interests.

Payment is more of a reason for Germans and young people in the Czech Republic (33% and 34% vs. 18% to 27%). Czechs are also most often applying for a job just to gain some initial work experience (35% vs. 12% to 26%). An interim solution to avoid unemployment is least likely a reason for Germans and Dutch (11% and 14%). This is more common in Italy and Spain (21% and 19%, the UK and the Czech Republic fall in between with 17% and 16%).

Chapter 3

Taking all aspects of your life into account, how do you feel about your future?

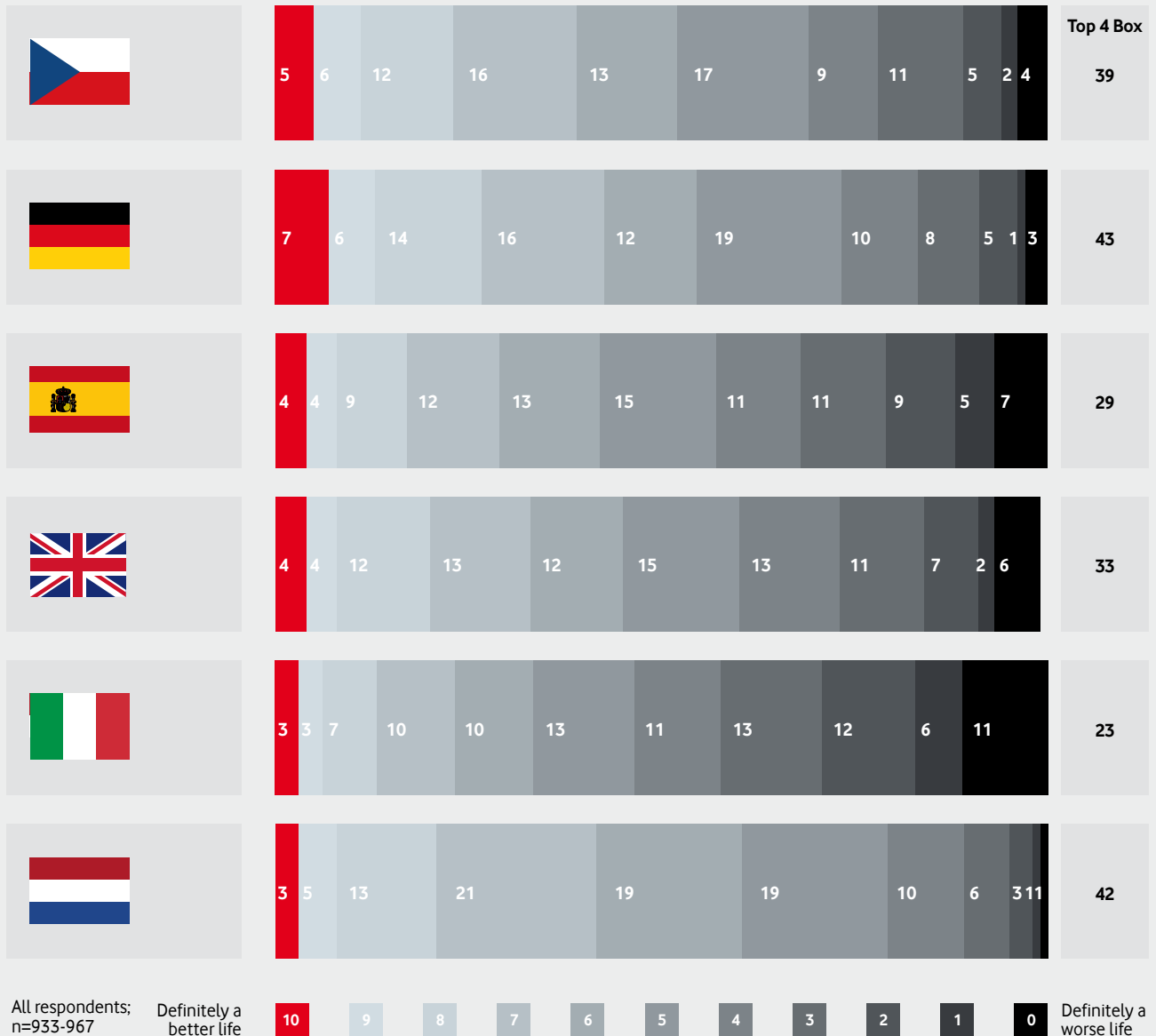


➔ **Italians and Spaniards have a considerably less optimistic outlook on the future.**

A lot of young Europeans share a rather optimistic view on their future, although there are considerable differences between countries. Dutch are most optimistic, 71% say so by answering 7 to 10 on a scale from 0 (very pessimistic) to 10 (very optimistic), whereas Italians are the least optimistic (41%).

Chapter 4

Do you think that, overall, your generation will generally lead a better life or a worse life than your parents' generation in terms of income and standard of living?



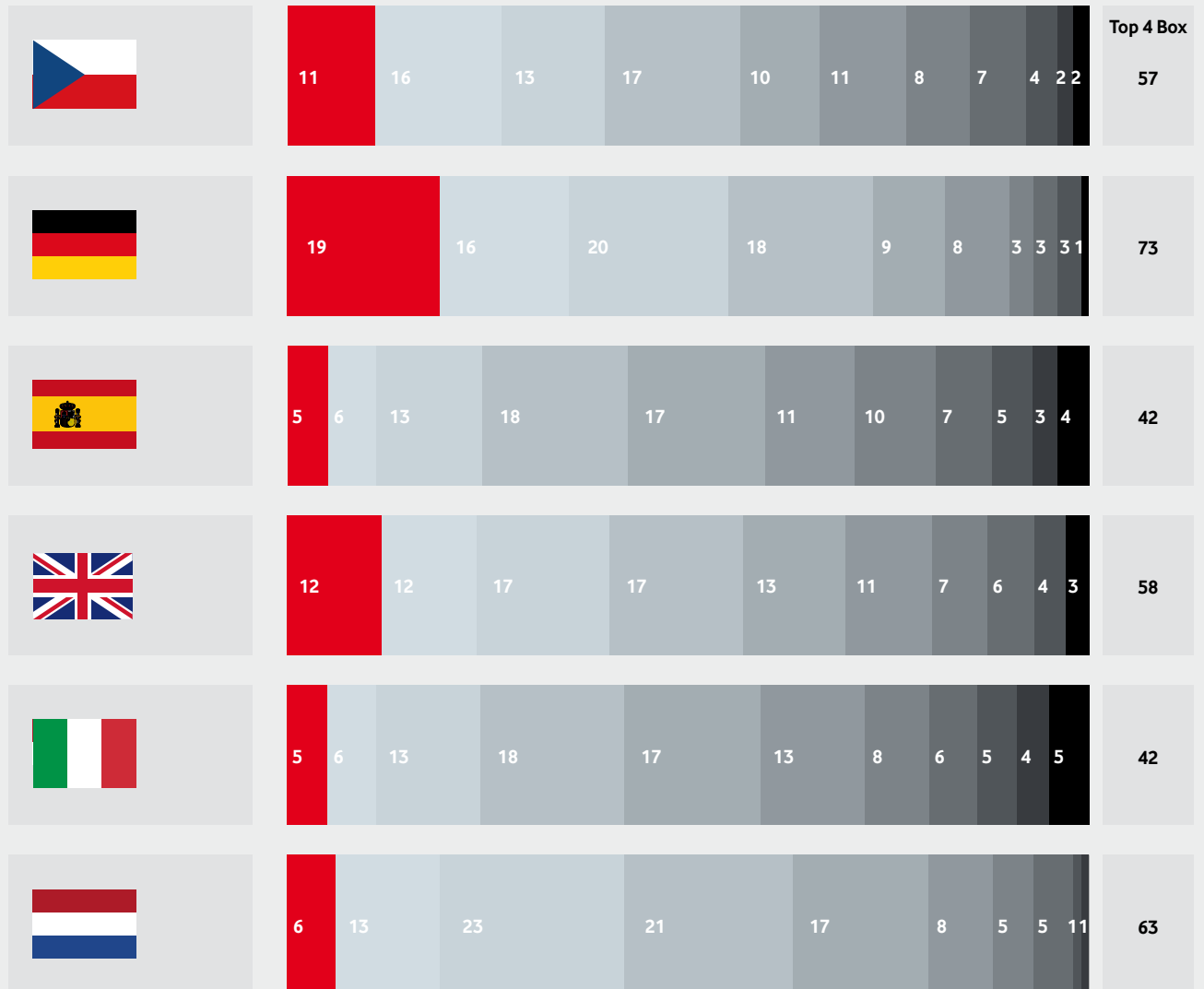
Only 23% of young Italians are convinced that they will have a better life than their parents, while 42% of the Dutch respondents think so.

On this topic, Germans are even more convinced they will be better off than their parents (43%). These figures show that the optimism many young people show is rather pragmatic. It does not necessarily mean that they believe things will continuously get better and improve living conditions beyond what the previous generation was used to.

Chapter 5

Thinking about your current field of education:

How confident are you that you will find a job in that area after you finish your studies/vocational training?



Very
confident



Not confi-
dential at all

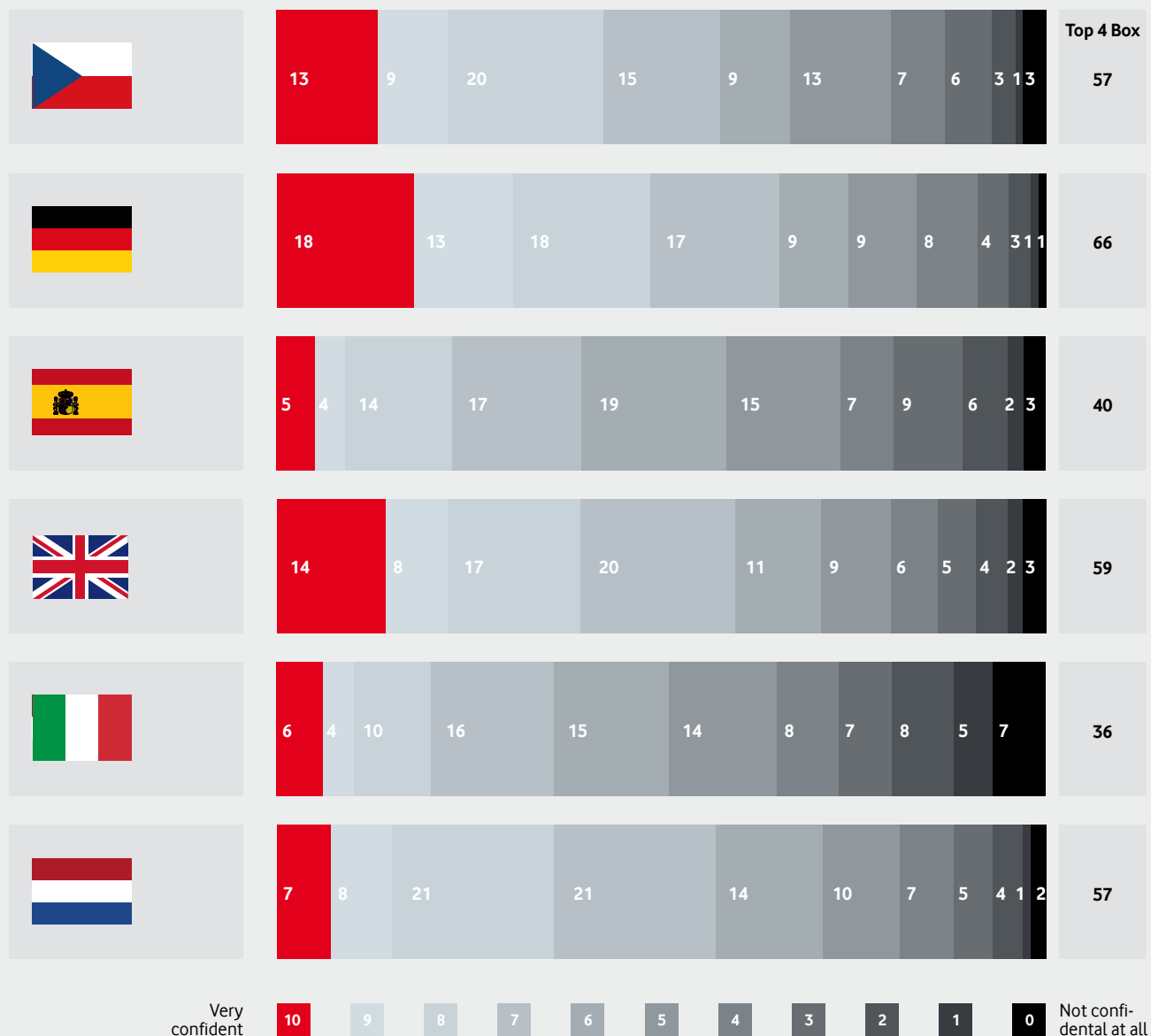
Respondents still undergoing education; n=374-594

➔ Italians and Spaniards are not confident if they can find a job based on their current field of education.

This question addresses young people who are still in education. Young Germans are most likely to say that they feel very confident about finding a job. Young adults from Spain and Italy seem to have the smallest confidence.

Chapter 6

Thinking about your current/last field of occupation: How confident are you that you will be able to still find a job in that area in the future?



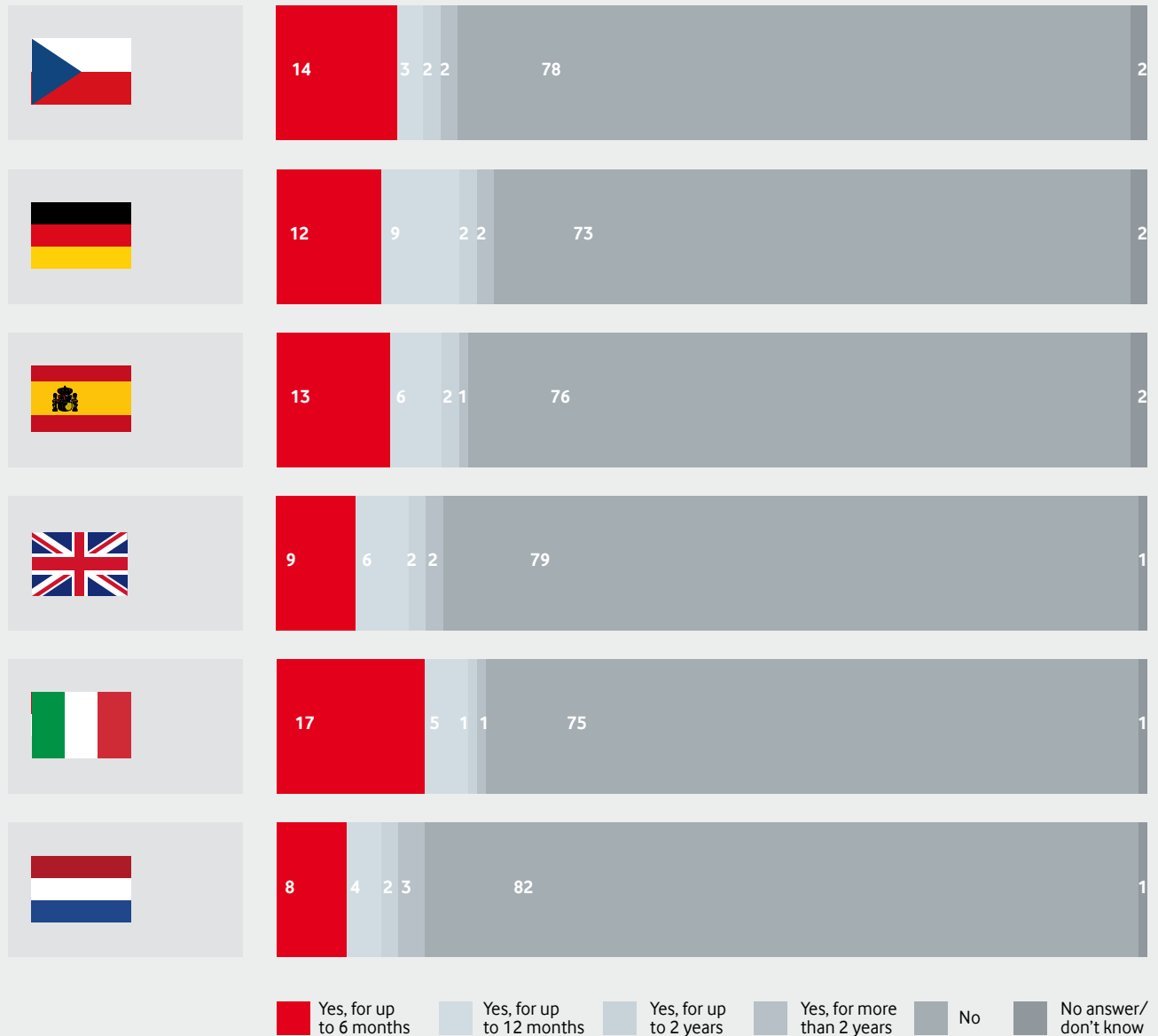
Respondents who are employed or used to be employed; n=437-654

➔ Economic uncertainty in Spain and Italy determines young adults' confidence about finding a job in the future.

This question addresses young people who are employed. Once more, young Germans are most likely to say that they feel very confident about finding a job. The UK, Czech Republic and the Netherlands show also quite positive figures in terms of finding a job in the future. Once again, Spain and Italy are to come in last.

Chapter 7

Have you ever lived abroad for a limited period of time?



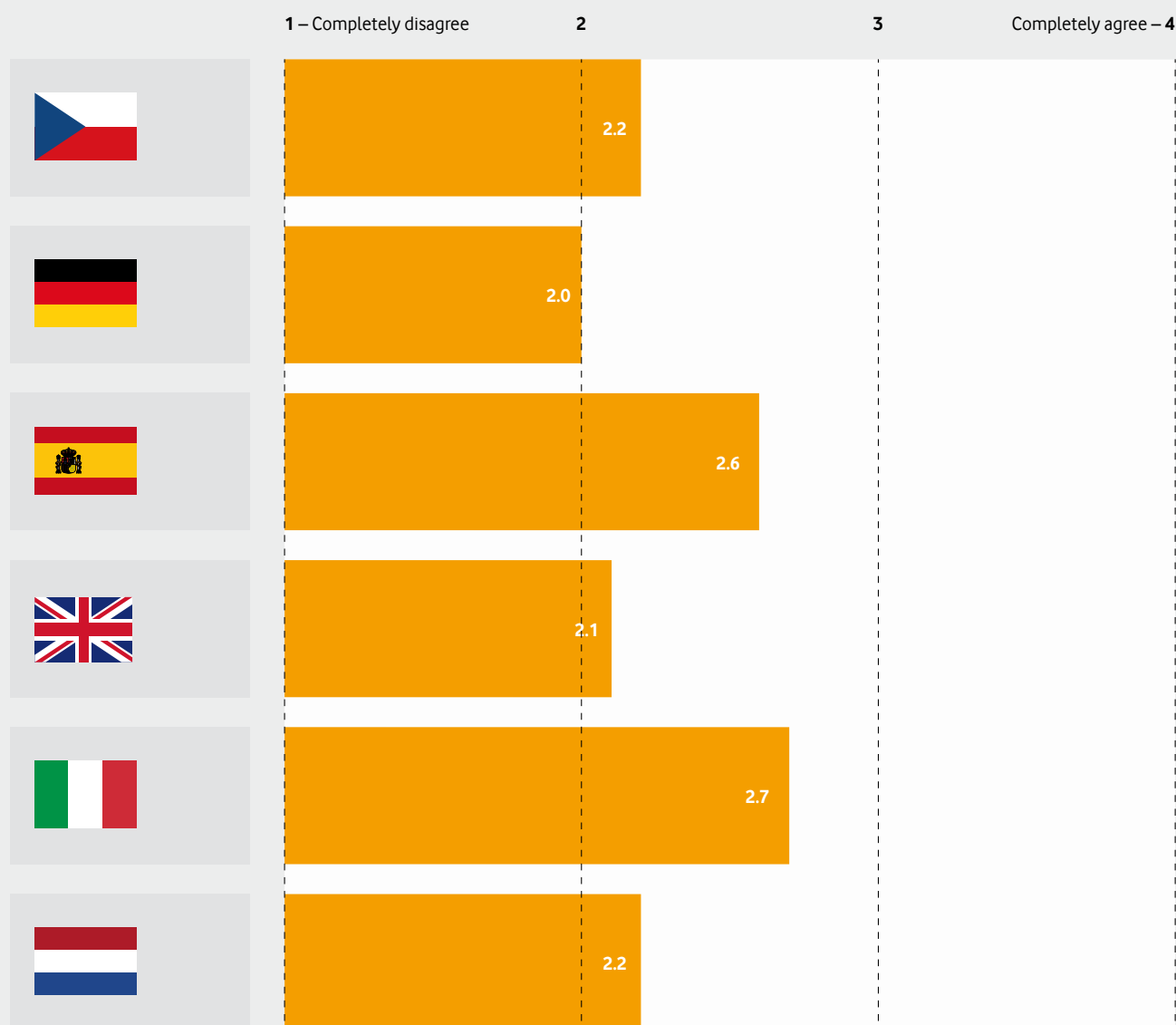
People who were born in the country they currently live in; n=834-957

➔ The majority of young people between 18 and 30 has not lived abroad.

The proportion of young people who did live abroad for some time is lowest in the Netherlands – and highest in Italy. 17% of Italians have lived abroad for up to 6 months, but only 8% of Dutch young adults.

Chapter 8

Please indicate how much you agree with the following statement relating to working and living abroad. I plan to move to another country in the future because of better job opportunities.



All respondents; n=845-950;
Means are shown

I plan to move to another country in the future because of better job opportunities.

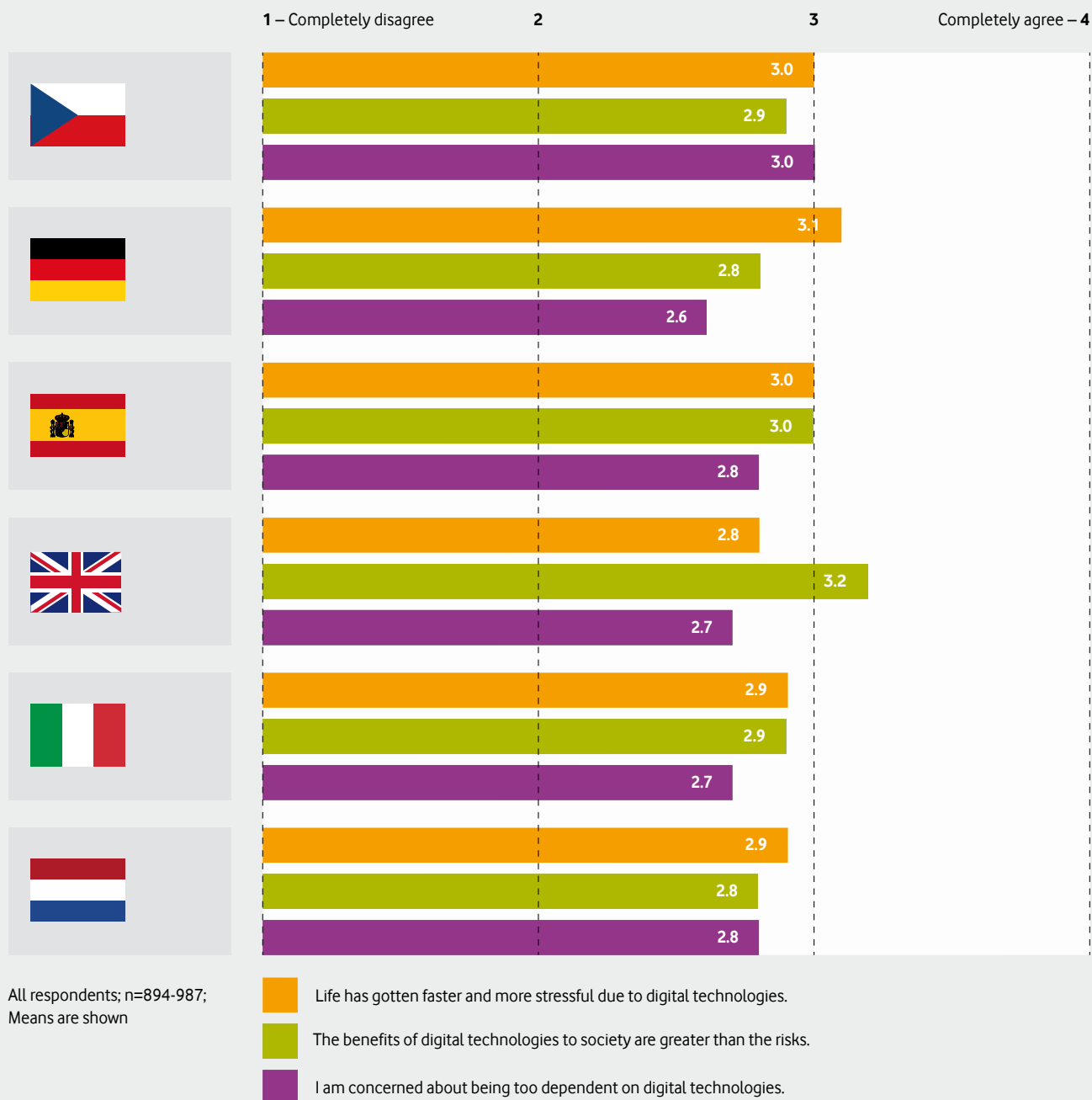


Economic development in Spain and Italy fosters readiness to move abroad for jobs.

39% of Italian respondents completely agree upon the notion that job opportunities are better in other countries (compared to 9% of Germans or 31% of Czechs), another 41% at least somewhat agree (24% Germans, 44% Czechs). 61% of Italian young adults are (rather) planning to move to another country in the future due to better job opportunities. Attitudes towards going abroad are clearly affected by past economic developments in Spain as well: 34% of young adults in Spain completely agree with the statement that job opportunities are better in other countries (and 38% agree somehow), 58% are (rather) planning to move in the future because of job chances. (See country reports for details, chapter 5.)

Chapter 9

Please tell us how much you agree with the following statements regarding digital technologies (smartphones, computers, etc.).

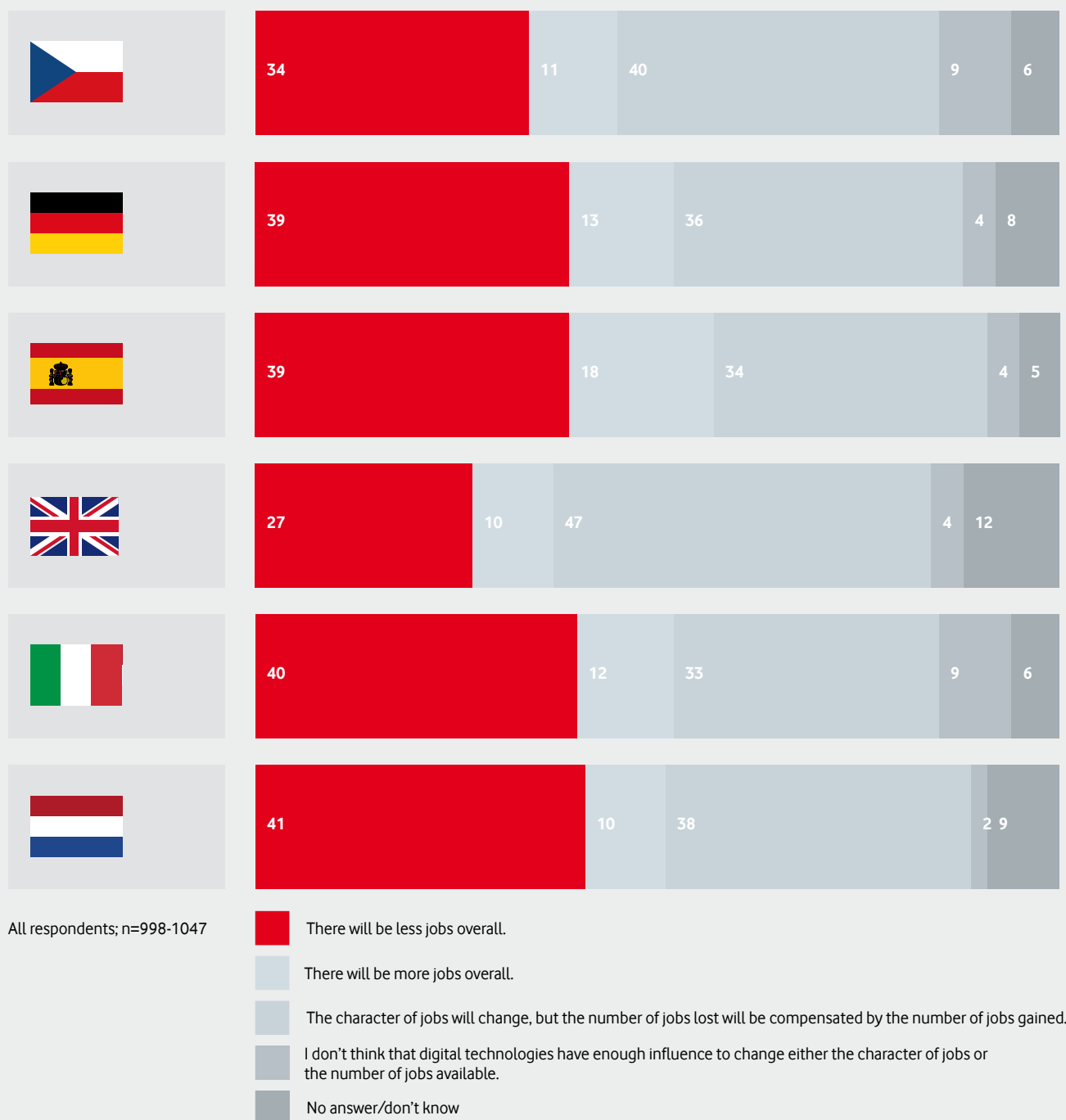


Young adults embrace chances of digitalisation – without denying its challenges.

Across all countries young people surveyed have the impression that life has gotten faster and more stressful due to digital technologies. A notable number of respondents is concerned about being too dependent on digital technologies, especially in the Czech Republic. However, the majority of young people agrees that the benefits of digital technologies outweigh its risks. Young Britons are particularly convinced about this notion. (More details in cross country report, chapter 5)

Chapter 10

Will there be more or less jobs in the future due to the digital revolution?

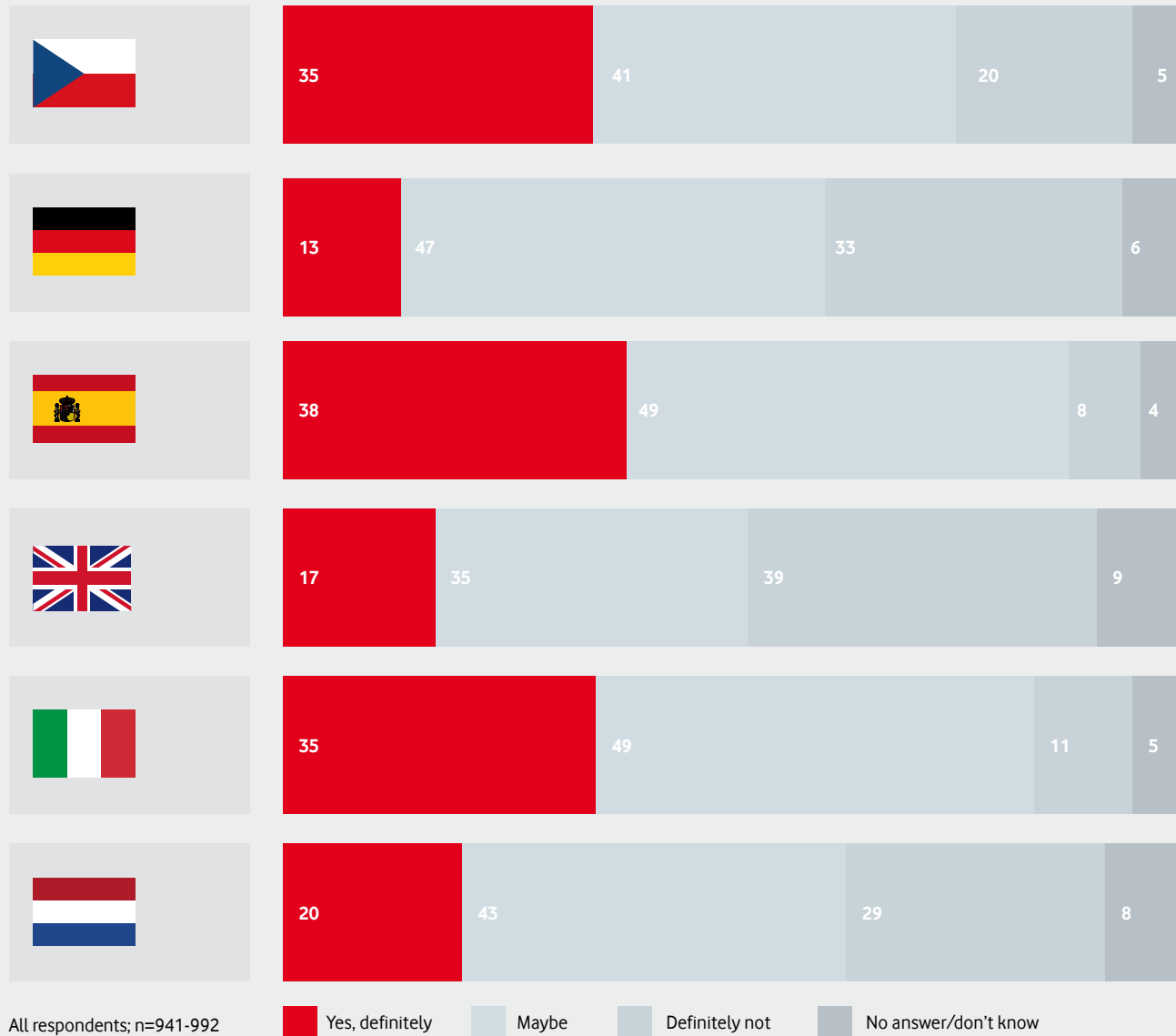


➔ Digitisation expected to change character of jobs – or destroy them?

When it comes to the effects of the digital revolution on the job market, young people are rather sceptical. Only a minority of young Europeans (10% to 18%) believes that jobs will be gained as a result of the digital revolution. 33% to 47% of respondents think that the character of jobs will change. 27% to 41% expect that the digitisation will lead to a loss of jobs. Young Italians and Spaniards believe that far more jobs will be destroyed than respondents elsewhere. 65% of Spaniards (68% of Italians) who expect a loss of jobs say that the number of available jobs will decrease by at least 20%. (More details in cross country report, chapter 5.)

Chapter 11

Would you generally be willing to pursue a career in the area of digital information and communication technologies (ICT, e.g. software or network engineering, programming, IT service, ICT training)?

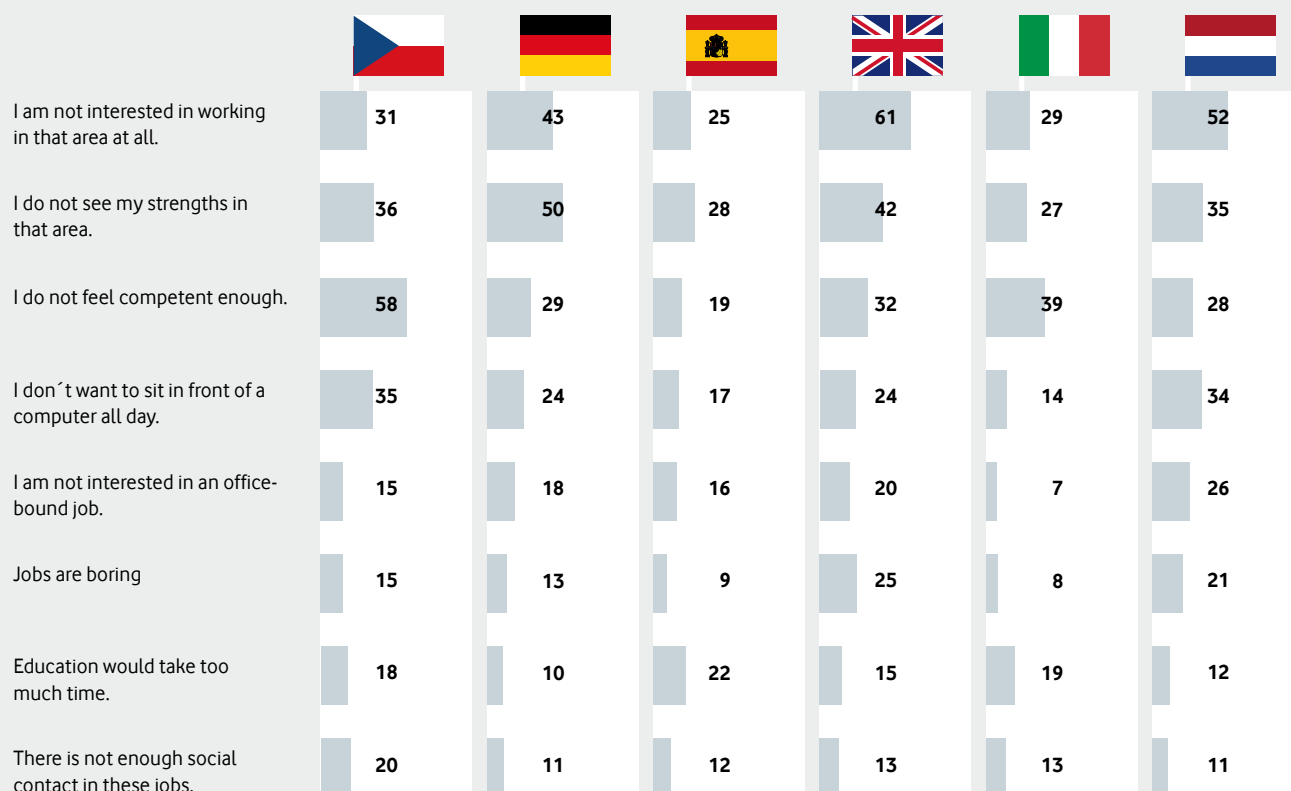


The digital revolution is loosing its children – in Germany.

Only 13% of young adults in Germany would definitely be willing to pursue a career in the area of digital information and communication technologies. This is the lowest number in all six surveyed countries. In addition, 33% of respondents in Germany are “definitely” not willing to go into the ICT area. Numbers for the United Kingdom are low as well. However, more than a third of young people from Spain, the Czech Republic and the Netherlands show clear interest in a career in the field of ICT.

Chapter 12

Why would you not consider / What makes you cautious to consider a career in digital information and communication technologies (ICT)?
Please tick all reasons that apply.



Respondents who would (likely) not consider a career in ICT; n=545-769

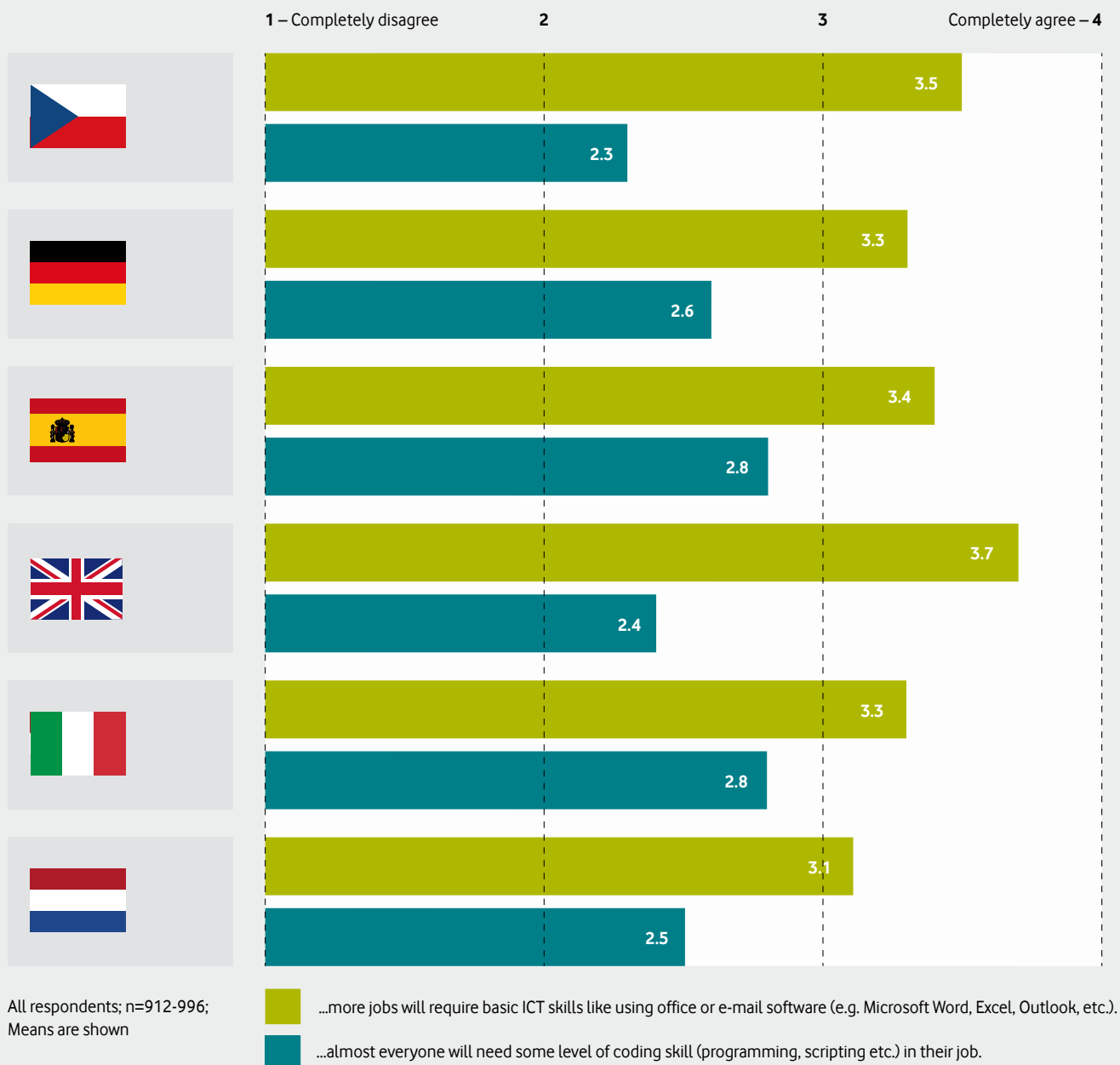
➔ A lack of interest and missing competences keep young Europeans from a career in the digital world.

There are various reasons why young people do not consider a career in ICT. Most strikingly, in all surveyed countries there was a significant share of young adults that has no interest in working in that area at all.

And often, they do not see their strengths in the area of ICT. Furthermore, a distinctive amount feels not competent enough, especially in Italy (39%) and the Czech Republic (58%) compared to Germany (29%), United Kingdom (32%) and the Netherlands (28%).

Chapter 13

Thinking about the skills at using digital information and communication technologies (ICT), in how far do you agree with the following statements? In the future...

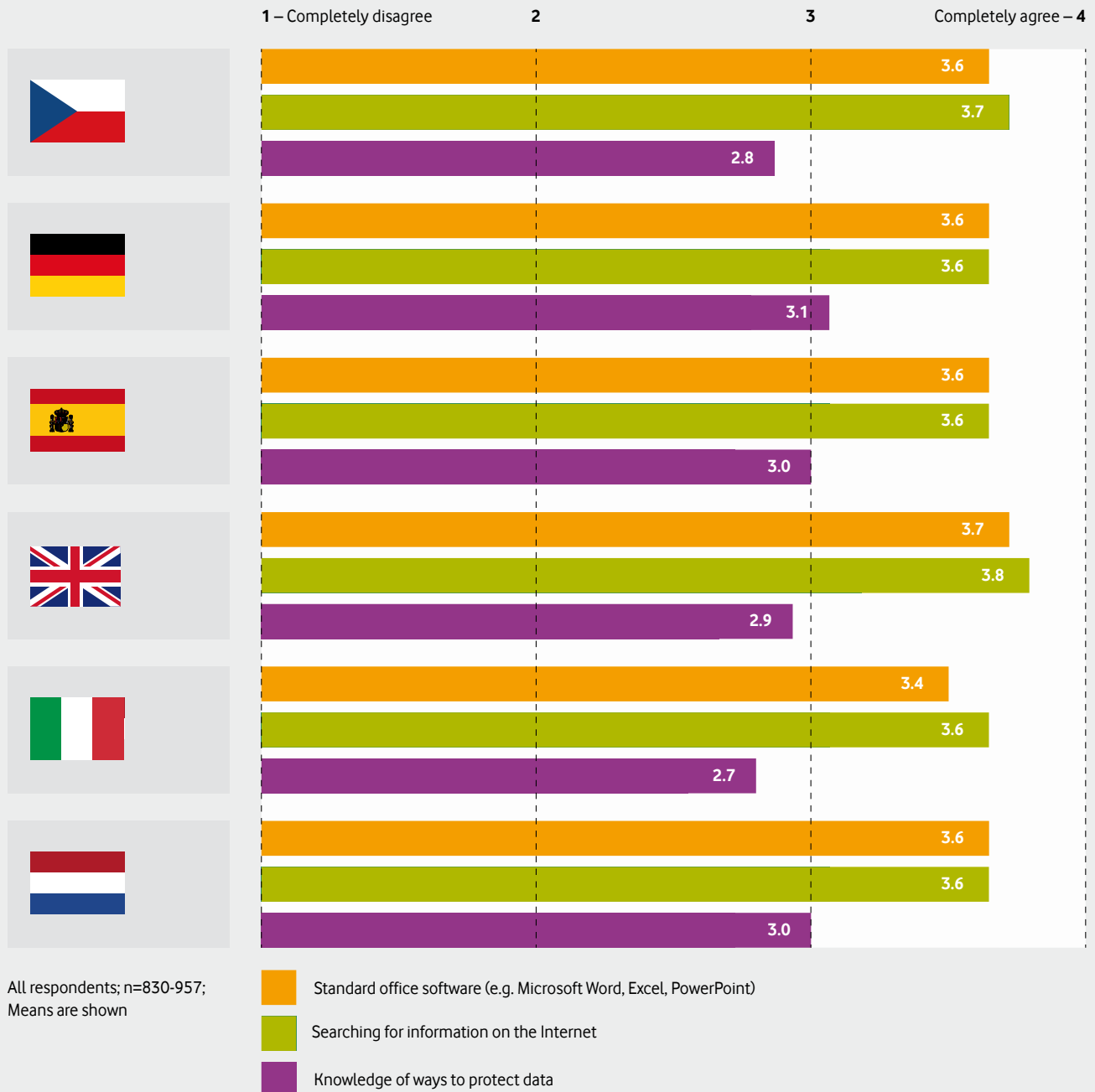


➔ Young Europeans are looking for the skills of a digital tomorrow in the world as we know it today.

With respect to specific skills, it becomes obvious across all countries that young people believe a skill to be more important the more it is considered to be basic today. Obviously, an uncommon skill today might become a basic skill in the future, but that link is, for the most part, not made by young Europeans. They generally feel that skills like using office or e-mail software will become even more relevant, whereas they consider hardware-related skills or coding to be less important. In this context, Italians and Spaniards are noteworthy as they generally attribute a much higher importance to more complex skills. Compared to young people elsewhere, they are more aware that coding might become a requirement.

Chapter 14

And how confident are you in your ability to perform these skills on the level required on your career path?

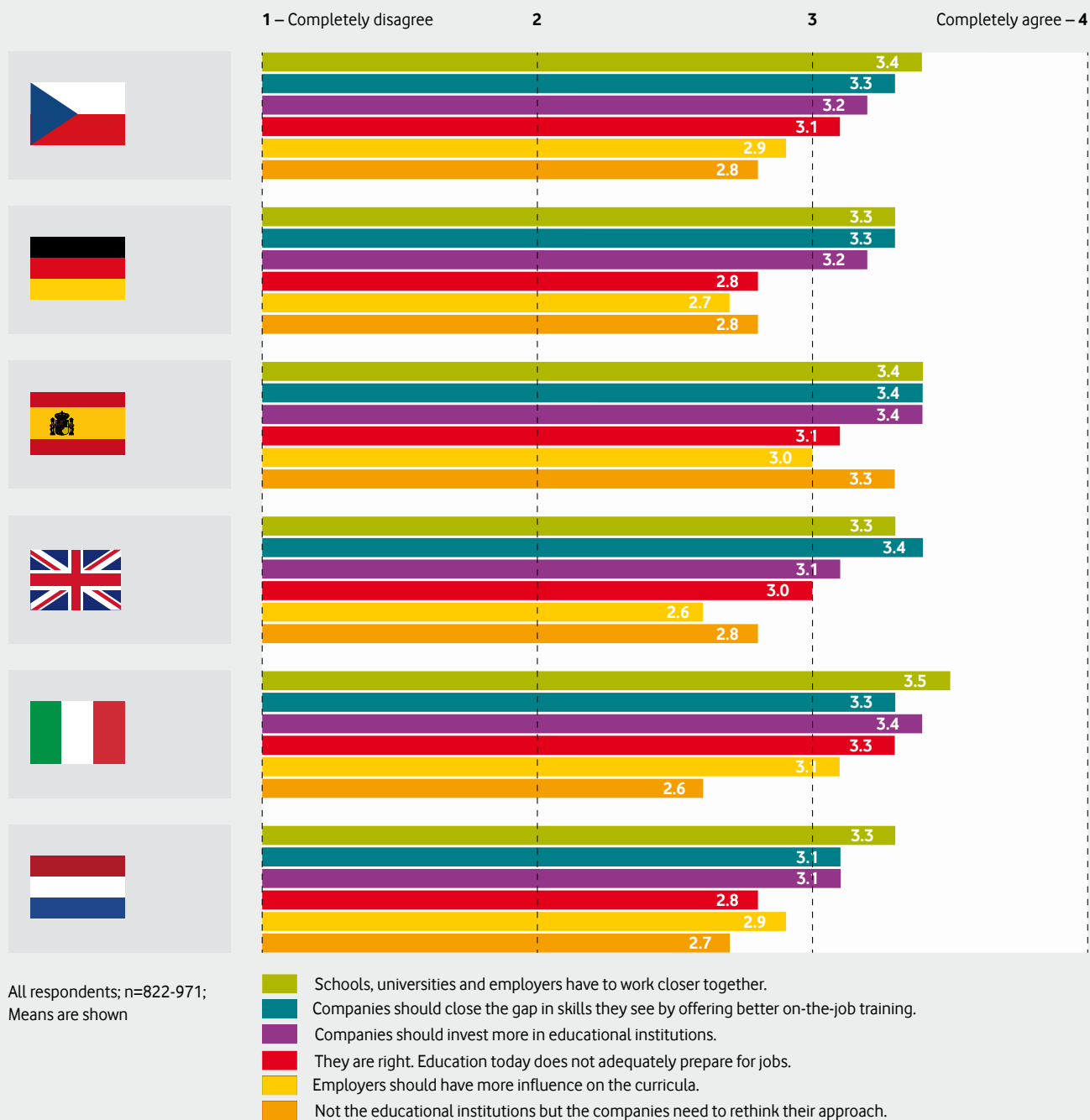


Young adults know the basics of ICT, but data security is an issue.

The majority of young people across all countries is very confident in using basic ICT skills such as office software or the ability of searching for information on the internet. However, there is a lack of confidence regarding data protection. Despite being seen as medium to highly important, young people feel less confident about this topic than about skills of similar relevance. The amount of young people decreases significantly when it comes to knowing ways to protect data and using tools for encrypting e-mails.

Chapter 15

Many companies state repeatedly, that they have difficulties finding employees who possess the right skill sets for their job. What is your opinion on this? Do you agree with the following statements?

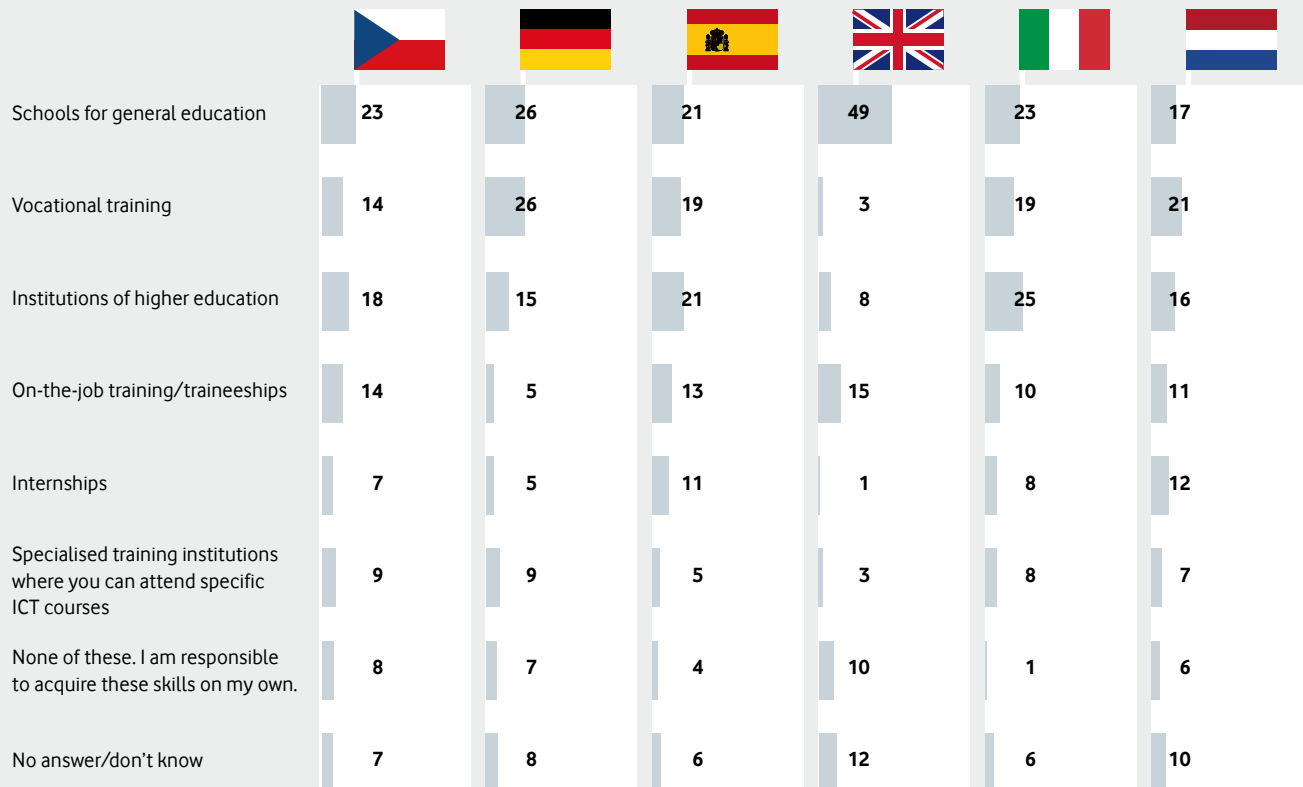


➔ When it comes to thinking about how employers, schools, and universities organize education, young Europeans are equivocal in their wish for more cooperation between these players.

They also hold companies responsible to offer more on-the-job training if they feel that there are skill gaps. Compared to other young Europeans, young Dutch are less likely to agree to this however. An interesting difference between countries is found in the attitude towards the idea that employers should have more influence on curricula. Especially Spaniards and Italians are in agreement with this, while more skepticism is present in the UK and Germany. Spaniards are also very remarkable in that they agree much stronger to the idea that not educators need to reassess their approach to education but companies.

Chapter 16

In your opinion, who is most responsible for teaching your generation the ICT skills that are required to succeed on a career path?



All respondents; n=1000-1047

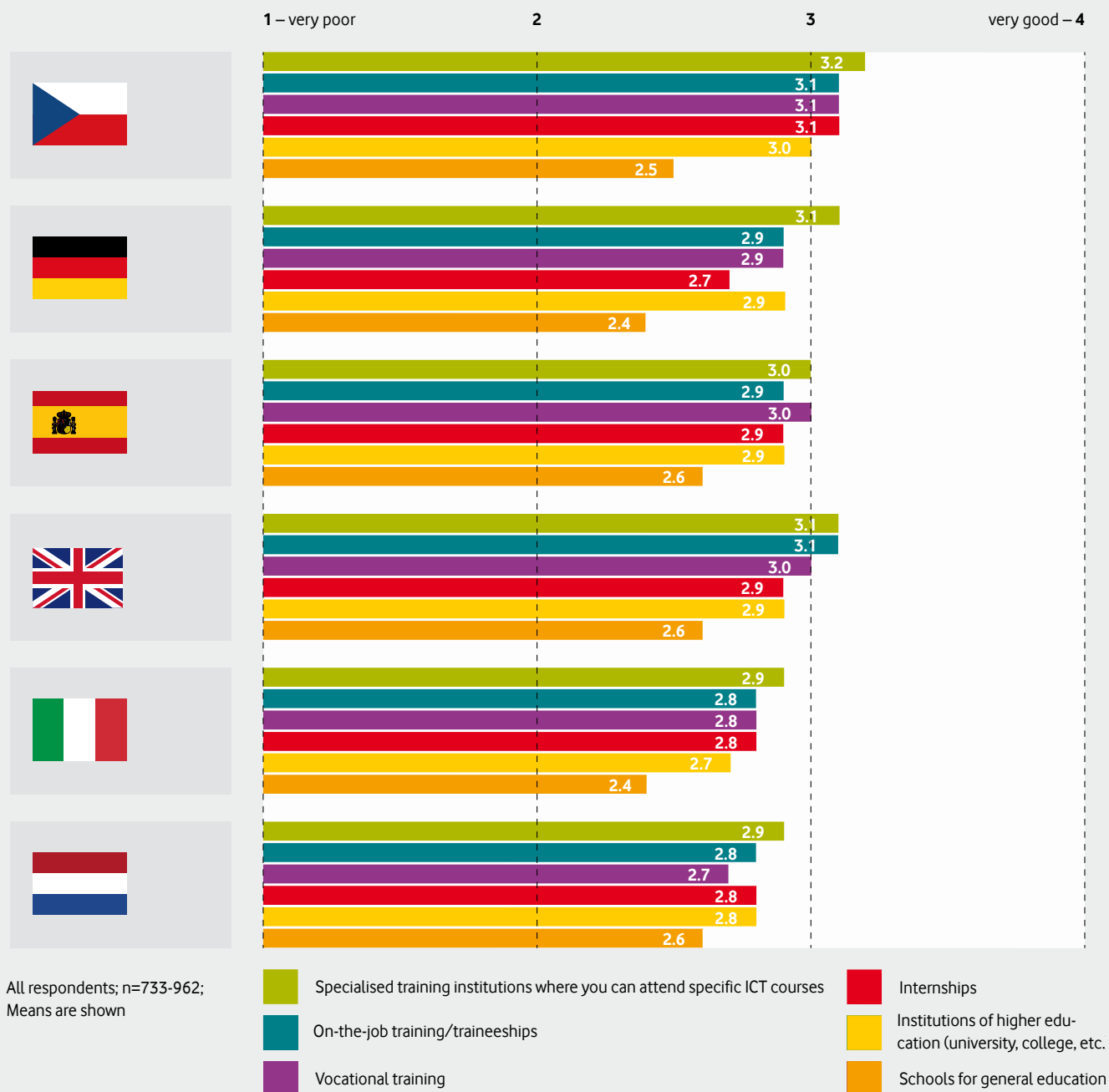


Schools for general education are mostly seen as responsible for teaching ICT skills.

Particularly young Britons share that opinion. Vocational training and institutions for higher education are also seen as important institutions for teaching ICT skills. On-the-job-training and traineeships do play a bigger role in the eyes of young people from Italy and Spain. Overall, young Europeans think that educational institutions, especially schools for general education and vocational training are responsible for teaching their generation the ICT skills required to succeed on a career path.

Chapter 17

In your opinion, how well do the following educational possibilities prepare your generation for what is expected on the job market in terms of ICT skills?

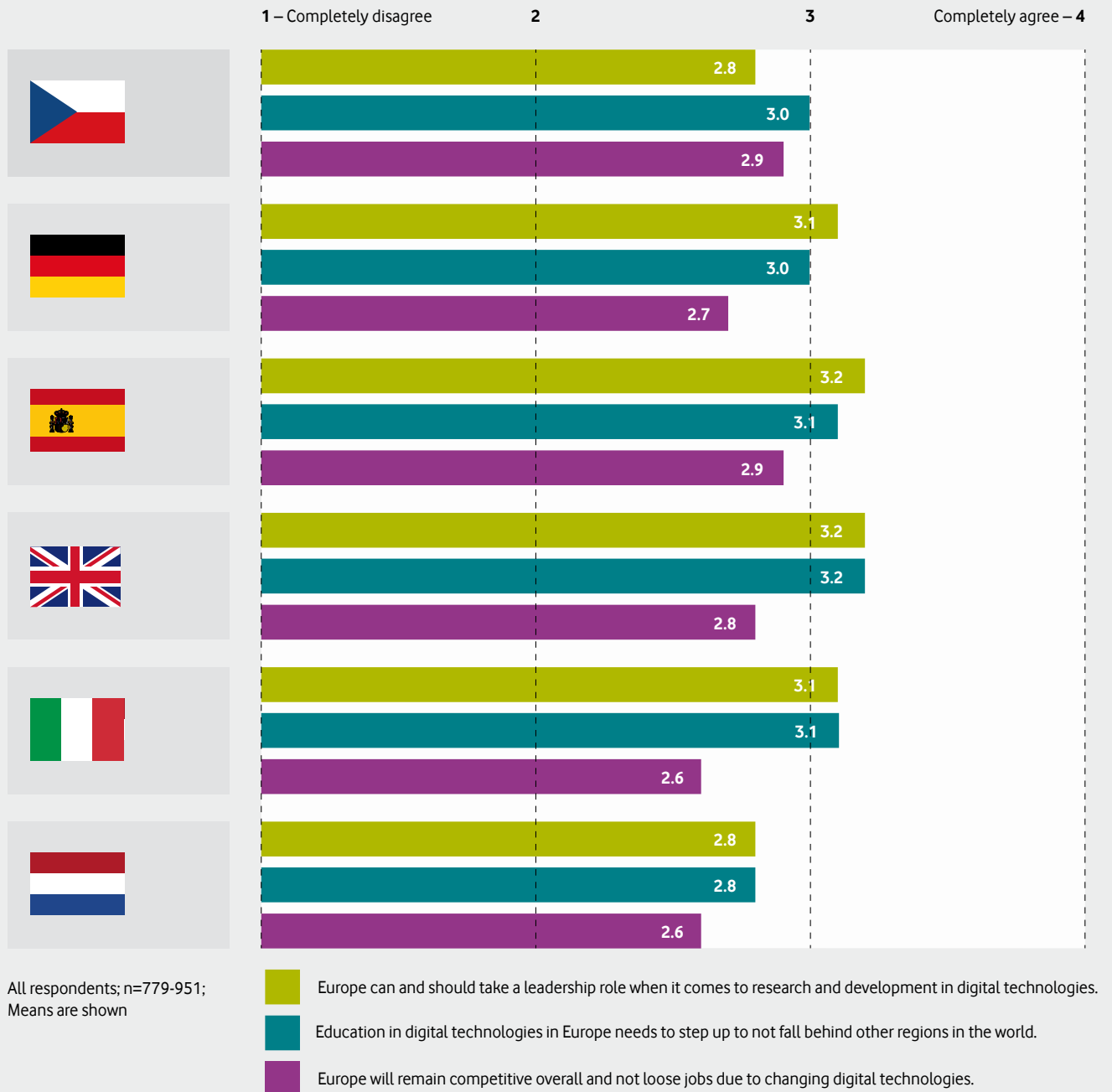


Poor grades for schools for general education.

In terms of ICT education, there is no European consensus that would hold one institution responsible in particular. Brits stand out in that they hold schools for general education responsible more often than other Europeans (49% vs. 17% to 26%). They also are least likely to see employers responsible in the form of vocational training (3% vs. 14% to 26%). While Europe is divided over the question who should be responsible for ICT education, it agrees on who provides the worst teaching of ICT: schools for general education. When asked about solutions to improve ICT education, respondents named: more ICT courses, better training of teachers, and a wider use of ICT outside specific courses. (More details in cross country report, chapter 7.)

Chapter 18

Thinking about ICT skills and their importance for the future workplace, do you think countries in Europe will keep up with the ongoing changes? Please indicate in how far you agree with the following statements.

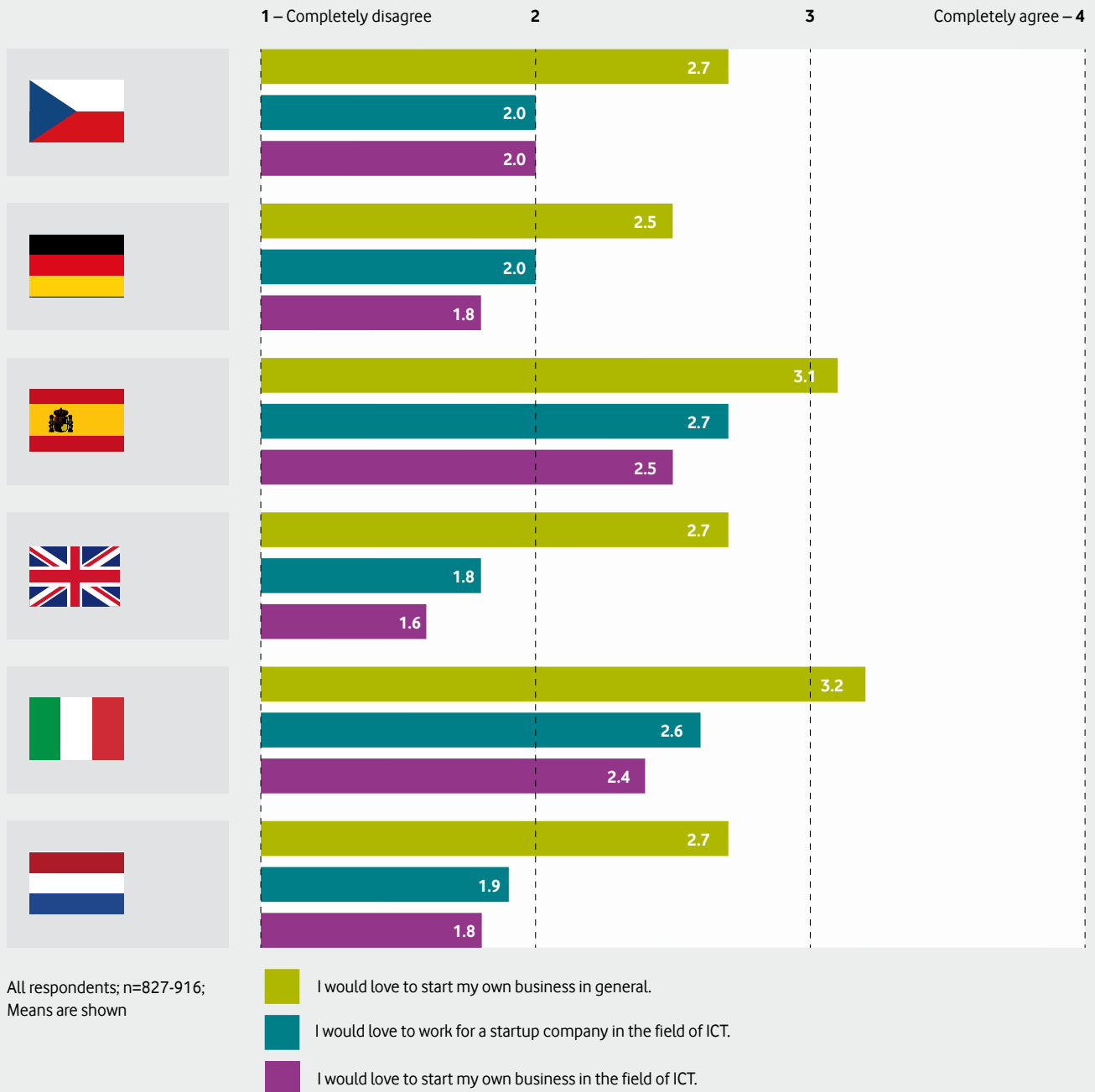


➔ Spaniards and Italians are most concerned about outsourced jobs and their home countries not remaining competitive in the digital revolution.

There is a general agreement across surveyed countries on the fact that Europe as a whole can and should take a leading role in ICT research and development. This conviction is less pronounced among young Dutch and Czechs. Asked for the perspectives of their home countries, reactions of respondents differ: Italians (60%) and Spaniards (49%) are least convinced that their home countries will remain competitive and not lose jobs due to the digital revolution while Germans (35%), Czechs (36%), the Dutch (40%) and Britons (31%) are more confident about the competitiveness of their respective home countries in a digitalised world.

Chapter 19

In how far do you agree with the following statements?



➔ Interest in starting an own (ICT) business is remarkably high in Italy and Spain.

The same applies to the idea of working for a (ICT) startup company in general. A remarkable motivation for Italians, Spaniards and also Czechs in that regard is the harsh job market which makes it hard to find employment (32% to 35%). This translates into a higher interest in starting a business in ICT or working for an ICT startup in Spain and Italy. Only 24% of young Germans would completely agree with the notion "I would love to start my own business in the field of ICT" compared to 17% in the UK, 27% in the Netherlands, 33% in the Czech Republic, but 47% Italy and 52% Spain.

Chapter 20

Which of the following reasons describe best why you would like to start your own business?



Respondents who agree that they "would love to start their own business"; n=475-732

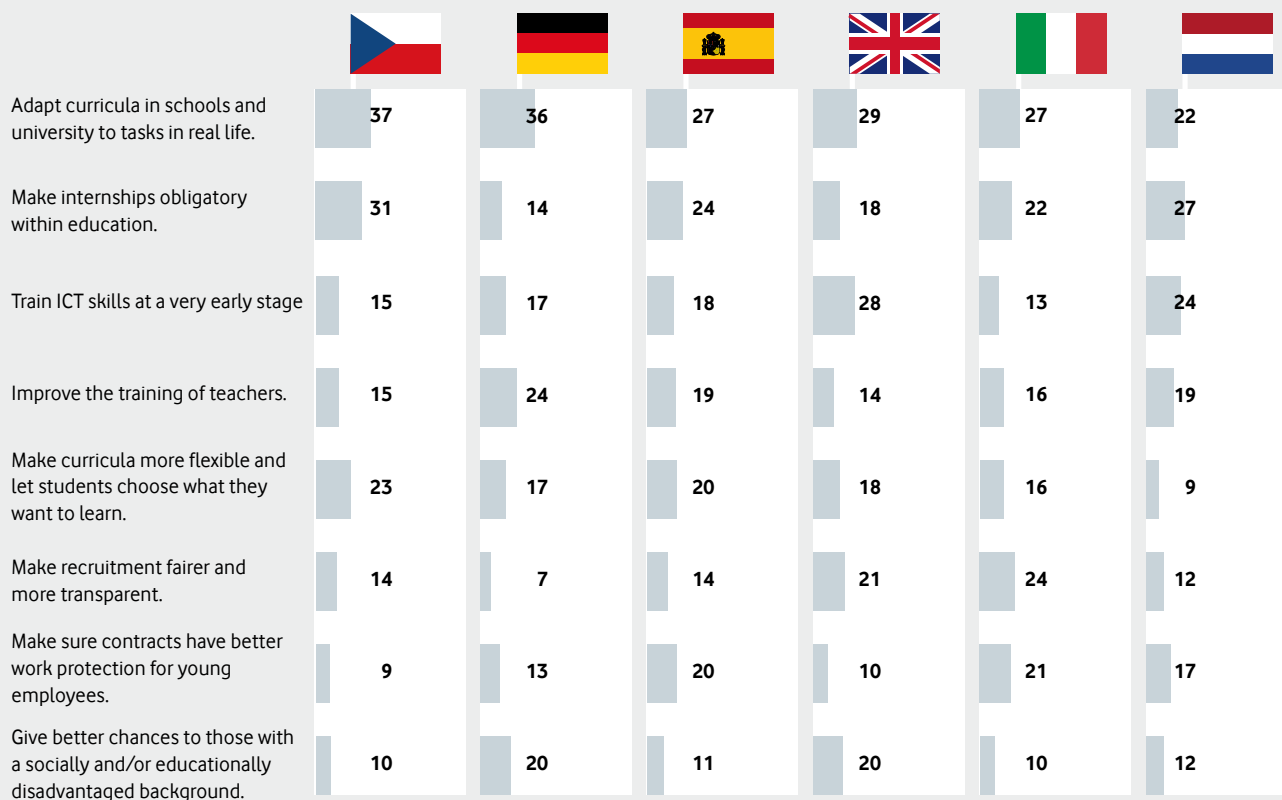


A problematic situation on the job market triggers interest in starting an own business quite often in Italy, Spain, and the Czech Republic.

Interest in starting an own business is driven by multiple reasons: First and foremost, young people are keen on realising their own ideas in all six countries. In the Czech Republic (32%), Italy (35%) and Spain (32%) in particular, starting a business is seen as a way to escape tough conditions on the job market. There are manifold reasons why young adults do not want to start their own business: Young Brits feel they are lacking business ideas. Young Dutch fear being in charge of their own business. Concerns about funding are often a reason against the own business in Italy, Spain, and the Czech Republic. (More details in cross country report, chapter 8.)

Chapter 21

If you were in charge to improve the chances of your generation to find and stay in a job, what are the 3 key changes you would make to the system of education and work?



All respondents; n=1000-1047



Changes in the system of education and work.

Young Europeans emphasise different measures depending on their home country. Especially Germans and Czechs feel that it is necessary to adapt education to real life tasks. Still, this is also a key change young people in other countries wish for. Young Brits want ICT education to be offered at a very early stage. Spaniards and Italians call for better work protection for young people, the latter also wish for fairer and more transparent recruitment processes. Germans and Brits stand out in that they more often believe that socially or educationally disadvantaged should be given better chances by the educational system.



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europe**

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