180+ COUNTRIES

4.3B CUMULATIVE TV SUBSCRIBERS

140,000+ PREMIUM TV EPISODES
“Research today is an inspiration. It’s where we begin. It informs our strategies. It informs both business and creative. It shapes our brands. It inspires our content and our marketing.”

Robert M. Bakish,
President and CEO, ViacomCBS
Over a decade of global youth research
Youth today have had eventful lives
A lot has happened in 2020 alone...
Now thinking about this current year (2020), please let us know how much you agree or disagree with the following statements.

Base: Total Sample, Aged 16-24 in all markets (n=8,160)

82% agree “I have had a lot of plans disrupted in 2020”

80% agree “2020 has made me rethink my plans for the future”

AVERY, 18, USA
And it’s not just the COVID-19 pandemic

COVID-19 pandemic 90%
Black Lives Matter, Anti-racist movements, Death of George Floyd, Protests against police brutality 52%
Natural disasters, Climate change protests 42%
Political events 30%
Wars 18%
Terrorism 12%

73% were impacted by something other than COVID-19

A5. Which of the following have had an impact on your life in 2020? This could be any change, either positive or negative, to the way you live, your habits, your views or outlook. Please select all that apply.
Base: Total Sample, Aged 16-24 in all markets (n=8,160)
Young people have been impacted everywhere

- The COVID-19 pandemic
- BLM, Anti-racist movements, Death of George Floyd, Protests against police brutality
- Natural disasters, Climate change protests

Note: Fieldwork took place between 22nd July – 5th August 2020

A5. Which of the following have had an impact on your life in 2020? This could be any change, either positive or negative, to the way you live, your habits, your views or outlook. Please select all that apply.

Base: Total Sample, Aged 16-24 in all markets (n=8,160)
Young people are increasingly stressed – and less happy

46% are stressed up from 38% in 2017

52% are happy down from 70% in 2017

A1. On a scale from 1-10, where 10 equals extremely stressed out and 1 equals not at all stressed out, how stressed out are you in general? Base: Total Sample, Aged 16-24 in all markets excl. PT & SG (n=7,160)

A2. On a scale from 1-10, where 10 equals extremely happy and 1 equals not at all happy, how happy would you say you are in general? Base: Total Sample, Aged 16-24 in all markets excl. PT & SG (n=7,160)
Beyond 2020
55% are hopeful for positive changes in the future

B2. Generally speaking on a scale of 1-10, where 1 equals not at all hopeful, and 10 equals extremely hopeful. How hopeful are you about seeing positive changes in the way we live in the next 10 years? (T4B)
Base: Total Sample, Aged 16-24 in all markets (n=8,160)
93% agree “I will have to work hard to achieve my goals”

55% feel this MORE strongly than a year ago

But they know the path won’t be easy
91% agree “I want to make the most out of what comes next (beyond 2020)”
But are also realistic and understand that change is difficult

REALITY ALIGNS
High hopes, high expectations
In their control

Representation of diverse groups on TV/film
Attitudes towards LGBTQIA+ communities
Attitudes towards diversity
Gender equality

REALITY GAP
High hopes, low expectations
Out of their control

Crime and violence
Terrorism
Wars around the world
People’s mental health

C1. We asked you which of the following areas you hoped would change for the better in the next 10 years. For the same list of issues, we’d like to understand which of them you think will actually have changed for the better in the next 10 years, by the time you are [ENTER Previous AGE + 10] years old? Base: Total Sample, Aged 16-24 in all markets who hoped for something to be better in 10 years (n=7,993)
The environment is the number one priority for young people

Areas young people think society needs to work on in the next ten years:

1. The environment
2. The economy
3. Gender equality
4. Crime and violence
5. Systemic racism

B1b. Which of these do you think are the most important issues for society to work on in the next 10 years? Please select up to 5 responses. Base: Total Sample, Aged 16-24 in all markets (n=8,160)
C1. We asked you previously which of the following areas you hoped would change for the better in the next 10 years. For the same list of issues, we’d like to understand which of them you think will actually have changed for the better in the next 10 years, by the time you are [ENTER AGE + 10] years old? Base: Total Sample, Aged 16-24 in all markets (n=8,160)
For themselves, in an uncertain world, young people crave security and stability.

Young people’s priorities for themselves in ten years’ time are:

1. Have a stable job
2. Keep myself/loved ones from harm
3. Be comfortable with who I am
4. Have a strong family unit
5. Take care of my mental health

C4. In 10 years’ time, which of the following do you feel will be the MOST important to you in your daily life. Please select up to three. Base: Total Sample, Aged 16-24 in all markets (n=8,160)
Looking to the future
The future of...
Keeping in touch online will be essential

61% agree “Relationships will mostly be kept alive by online connections”

67% agree “My friends will live in many countries around the world”

C2. We would like you to continue to think about the world in 10 years’ time, when you are [ENTER AGE + 10]. Please let us know how much you agree or disagree with the following statements. Base: Total Sample, Aged 16-24 in all markets (n=8,160)
But will be no substitute for IRL

84%

agree “Spending time with people in person will be as important as it is today”

C2. We would like you to continue to think about the world in 10 years' time, when you are [ENTER AGE + 10]. Please let us know how much you agree or disagree with the following statements.

Base: Total Sample, Aged 16-24 in all markets (n=8,160)
Youth think that travel is likely to bounce back

72% agree “People will travel as much as they did before the COVID-19 pandemic”

C2. We would like you to continue to think about the world in 10 years’ time, when you are [ENTER AGE + 10]. Please let us know how much you agree or disagree with the following statements.

Base: Total Sample, Aged 16-24 in all markets (n=8,160)
‘The more you travel, the more you understand different worlds. I hope to travel as much as possible, because I am hoping to grow more and more.’

ROSSELLA, 19, ITALY
But believe consumers will also consider the environment

72% agree “People will be more likely to choose environmentally friendly vacations”

39% agree “I won’t fly due to the impact on the environment”

C2. We would like you to continue to think about the world in 10 years’ time, when you are [ENTER AGE + 10]. Please let us know how much you agree or disagree with the following statements. Base: Total Sample, Aged 16-24 in all markets (n=8,160)
C2. We would like you to continue to think about the world in 10 years’ time, when you are [ENTER AGE + 10]. Please let us know how much you agree or disagree with the following statements.

Base: Total Sample, Aged 16-24 in all markets (n=8,160)
Youth hope to be financially independent but recognize they may face challenges

60% agree “I feel I will struggle financially in the future”

41% say their finances are likely to show change for the better in the next 10 years

C2. We would like you to continue to think about the world in 10 years’ time, when you are [ENTER AGE + 10]. Please let us know how much you agree or disagree with the following statements. C1. We asked you previously which of the following areas you hoped would change for the better in the next 10 years. For the same list of issues, we’d like to understand which of them you think will actually have changed for the better in the next 10 years, by the time you are [ENTER AGE + 10] years old? Base: Total Sample, Aged 16-24 in all markets (n=8,160)
Youth know that the world of work will continue to undergo dramatic transformation

80% agree “Remote and flexible working will be the norm”

79% agree “AI and automation will have replaced many jobs”

71% agree “More people will want to work in a role that helps people”

C2. We would like you to continue to think about the world in 10 years’ time, when you are [ENTER AGE + 10]. Please let us know how much you agree or disagree with the following statements.

Base: Total Sample, Aged 16-24 in all markets (n=8,160)
When it comes to our industry, TV will remain an important part of young people’s lives.

83% agree “I will be able to watch what I want, when I want, where I want”

75% agree “Watching TV shows and movies will continue to be an important part of my life”

C2. We would like you to continue to think about the world in 10 years’ time, when you are [ENTER AGE + 10]. Please let us know how much you agree or disagree with the following statements. Base: Total Sample, Aged 16-24 in all markets (n=8,160)
Youth take pride in education

76%

agree “My generation will be better educated than previous generations”

C2. We would like you to continue to think about the world in 10 years’ time, when you are [ENTER AGE + 10]. Please let us know how much you agree or disagree with the following statements.

Base: Total Sample, Aged 16-24 in all markets (n=8,160)
Formal learning will still be important, but university is not the only path to success

59%

disagree “School/university education will be less important than it is today”

54%

agree “University degrees will be less of a requirement for many careers”

C2. We would like you to continue to think about the world in 10 years’ time, when you are [ENTER AGE + 10]. Please let us know how much you agree or disagree with the following statements. Base: Total Sample, Aged 16-24 in all markets (n=8,160)
2020 has put health on young people’s radar

84% agree “Health (both physical and mental) will be a bigger focus in people’s lives”

C2. We would like you to continue to think about the world in 10 years’ time, when you are [ENTER AGE + 10]. Please let us know how much you agree or disagree with the following statements. Base: Total Sample, Aged 16-24 in all markets (n=8,160)
Youth recognize that mental health will be a problem and a priority in future

75% agree “Mental health will be a major problem for society”

83% agree “There will be more openness and acceptance of mental health issues”

41% have taken part in a conversation about mental health as a result of the events of 2020

C2. We would like you to continue to think about the world in 10 years’ time, when you are [ENTER AGE + 10]. Please let us know how much you agree or disagree with the following statements. B4. As a result of the events of 2020, have you done any of the following activities? Base: Total Sample, Aged 16-24 in all markets (n=8,160)
Youth expect accountable and diverse leaders

74% agree “Governments and politicians will be held more accountable for their actions”

72% agree “The politicians governing our country will be from a more diverse range of backgrounds than they are today”

C2. We would like you to continue to think about the world in 10 years’ time, when you are [ENTER AGE + 10]. Please let us know how much you agree or disagree with the following statements. Base: Total Sample, Aged 16-24 in all markets (n=8,160)
“I would like to see more diversity from the government - people of color, LGBTQ, queer, different religions - people from different walks of life.”

ALYSSA, 20, AUSTRALIA
But they don’t expect much to change

73% agree “Corruption will still be a problem in my country”

63% agree “Nothing much will have changed in politics”

C2. We would like you to continue to think about the world in 10 years’ time, when you are [ENTER AGE + 10]. Please let us know how much you agree or disagree with the following statements. Base: Total Sample, Aged 16-24 in all markets (n=8,160)
They understand the responsibility for future change lies in their own hands

82% agree “Everyone will be expected to educate themselves about social issues”

80% agree “I will be actively involved in creating a society of equality”

C2. We would like you to continue to think about the world in 10 years’ time, when you are [ENTER AGE + 10]. Please let us know how much you agree or disagree with the following statements. Base: Total Sample, Aged 16-24 in all markets (n=8,160)
Youth expect brands to join them on this mission

**TODAY**

83% agree “I expect brands to stand up against social injustice”

**IN THE FUTURE**

78% agree “Brands will take MORE of a stand against social injustice”

B3a. We would like to know about your attitudes towards each of the following. We are interested to know to what extent you agree or disagree with the following statements. C2. We would like you to continue to think about the world in 10 years’ time, when you are [ENTER AGE + 10]. Please let us know how much you agree or disagree with the following statements. B4. As a result of the events of 2020, have you done any of the following activities?

Base: Total Sample, Aged 16-24 in all markets (n=8,160)
B3a. We would like to know about your attitudes towards each of the following. We are interested to know to what extent you agree or disagree with the following statements. Base: Total Sample, Aged 16-24 in all markets (n=8,160)

84% agree “My generation has the potential to change the world for the better”

Alyssa, 20, Australia
So What?
Adapt
A climate change promise from Apple.

Apple is carbon neutral. And by 2030, all of our products will be too.

We're designing the world's most innovative products from recycled materials. Soon we'll make them all with clean energy and no carbon footprint. Some say it's impossible. At Apple, we think different.
BREWDOG FOREST. COMING SOON.
BREWDOG FOREST. COMING SOON.
TOGETHER TASTES BETTER™
Key Takeaways

2020

- 2020 has been a challenging year but despite all this, young people are optimistic
- The events of this year have prompted a desire for stability
- While the future remains uncertain, young people are excited and eager to make the most of what comes next
Key Takeaways Beyond 2020

- Climate change should be high on the agenda
- Health - mental health especially - also needs increased attention and support
- Educating themselves on social issues is important
- Young people are looking to brands to make a difference
- Young people want to experience and immerse themselves in other cultures
Thank you!

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