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CULTURE 

Brands, the new social reformers

WHAT PEOPLE WANT IN 2012
SOCIAL REFORMERS
THE FUTURE OF CSR
POSITIONING AS A SOCIAL REFORMER
HIGHLIGHTS OF FINDINGS

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INTRODUCTION

During the 2011 Holiday Season, we fielded a study in Britain and the US amongst 763 earlier technology adopters and news-engaged Millennials and Baby Boomers. The purpose was to identify their ambitions, fears and concerns for 2012 and understand their attitudes toward brands, including social responsibility. We also wanted to better identify how far apart, if at all, Millennials and Boomers are in their perceptions of society. Comparing and synthesizing the learning from this study with that from our on-going conversations with Millennials, we assessed the social and cultural climate in which brands will be engaging with people over the next year. Certainly, things continue to shift, and although the future is still being defined, it seems as though we're inching our way into it although not necessarily as predicted.

So what's new?

To understand this we need to go back to 2000 or 2001. Remember Y2K? The world stood on the brink of disaster as we exited the Twentieth Century, or so many anticipated. We breathed a sigh of relief as we entered the Twenty First Century and IT infrastructures remained stable. Soon after, the Dot-Com bubble burst, and then a year and a half later, the world stood by in shock with the Sept 11th terrorist attacks. Although life changed for some permanently, for most the insecurity and fear experienced afterward was temporary and things returned to a more normal rhythm. Then the Iraq War, 7/7 and the 2007 Sub-Prime Crisis that triggered the Global Recession and the roller coaster of emotions people have been on since. Given what's happened since the 1st of January 2000, it's no wonder insecurity about the future is becoming a permanent feature in our psyche. As we go tentatively forward into 2012, some feel optimism about the economy turning around while others have a sense of despair because of its continued stagnation. Whichever the sentiment, each of our viewpoints clearly defines the goals we set for the year ahead. Equally important, the decisions we are making now are resetting the expectations we will have for our lives in the decades to come.

Alongside our predictions for our own futures, the way we interact with brands and the roles we believe they should take in shaping society is also shifting.

The role brands have played in society has changed over the years. They began as identifying marks and signifiers of ownership then evolved into tools that helped people to purchase goods and services - they distinguished or differentiated one product from another. In the 80's, brands began to shape our aspirations; they represented our dreams and desires. Around the turn of the century, they began to inspire us and represent things that had more to do with actualizing who we are on a higher level than about socially validating ourselves.

It's no surprise that brands again are changing. What's interesting about the shift this time is that it appears consumers - or people as we like to think of them - themselves are driving the change, not marketers or advertisers.

What people want in 2012

We're after security and contentment from a new age of invention that incorporates social progression in its heart.

"My hope is that society will become more family orientated than government orientated."

Overwhelmingly, people's attitudes are being shaped by their economic outlook for the coming year. At the time of our survey, whether they believed the economy would improve or not in 2012, the majority were uneasy at best. Much of their concern about the future stems from a lack of clear, inspiring and relevant leadership in government. As the media has been emphasizing, faith in government is low in the US and in the UK. Millennials and Baby Boomers in our research use the same words to label political leaders as they do to vilify banks and oil and gas companies. Participants tell us strong or even prophetic direction setting is essential to get us out of the economic mire and re-engage disillusioned societies.

Simultaneously, they are seeking security and stability in an intensified global world and calling for a new age of invention that incorporates social progression in its heart. With this in mind it's essential that business rethink how it can contribute to society and further break down the boundaries that divide shareholders from some stakeholders.

We're seeking values that help us belong to the group and at the same time don't compromise our individual needs

The hopes, dreams, concerns, fears and values US and UK Millennials and Baby Boomers have for 2012 reflect need states across the three requirements of human existence: as individuals (security, control, consistency); as members of a group (respect - for self and others); and, as a group itself (liberty and progress). Importantly, however, even seemingly social need states center on me. In our consumerist culture, **we** (meaning a group, community or society as a whole) matter but not if it means **I** must sacrifice or even compromise something I desire. Somebody else (a person, a company or the government) must do this. As does technology, collaboration, collectivism and freedom all exist to serve the individual first.

Desired need-states for 2012:

Leadership brands will incorporate these need-states into their value propositions

Security: food, shelter, keep my house, increase my savings, bolster my retirement plan, a corporate job, being part of a movement but not a sole anarchist

Control: frugality, effective money management, black and white answers that come from scientific pursuits, own business/enterpenurship, self-reliance (especially younger Millennials)

Consistency: stable employment, stay at college, complete college

Proving self-worth: value through charity work, striving to get promoted, finding a way to leave a legacy (baby Boomers), training/learning something new rather than leisure time, constant CV/resume buffering (especially Millennials), aggressive pursuit of success (older Millennial males in the US)

Honoring my needs first: protecting my health, making healthier friendship and relationship choices, spending more time with people who have my genuine interests at heart, valuing private information more (Millennials)

Respect for others (but only if they show respect for me first): rejection of greed and self serving society as demonstrated by governments and corporations, helping others through volunteer pursuits

Liberty: personal independence, time for me (Baby Boomers), take control of my investments (Baby Boomers), not oppressed/restricted by others schedules or technology

Progress: pursuit of scientific invention and learning, further education, choice of foundations, supportive of organizations who take society forward in some way

In 2012, brands will have the opportunity to be social reformers

Brands, not governments, are better placed to progress society

"Business not government is more suited to fix things in society."

Millennials and Baby Boomers tell us leadership brands that are sincere and transparent have the ability to encourage us to bring out the best of ourselves and progress society. In the absence of strong government leaders, people anticipate, and may even soon demand, brands step in and play the role of cultural reformers.

Brands are perceived to be more in tune with our day to day lives and values than government for the following reasons:

Brands unite and inspire

- When a clear sense of purpose is embedded in a brand vision and mission, it inspires people to follow something they collectively feel passionate about.
- Brands are accustomed to innovating to survive.
- They therefore have the tools and the techniques needed to take society forward.
- Unlike political reform, brand reform knows no opposing force.
- Political reform comes at the expense of an opposing ideal - for example, universal health care is opposed by an equally strong privatizing health care force - brands however freely advocate for human improvement and social progress.
- Brands reflect our human potential.
- Our respondents believe brands have the ability to turn principles and ethics into results (products, services and social initiatives) and thereby exemplify good citizenship.

To reform society, brands need to be real not perfect

In 2012, leading brands will let go of the need to act like demi-gods and convince us they are perfect. The on-going recession and scandals that have accompanied it have demonstrated to many Millennials and Baby Boomers in the US and UK alike that corporations, like people, are inherently imperfect. People, especially Millennials, understand that leading brands are complex and paradoxical, just like humans. They mirror the values, goals, hopes and dreams that people strive for each and every day (ie, comfort, creativity, ingenuity). And do so with a clear vision. When managed effectively,

brands can represent an aspirational and attainable form of perfection and help us to reach an improved human potential.

Ideal reforming characteristics

The seven characteristics people point toward when describing ideal leaders in general apply as much to brands as they do political leaders.

Visionary: inspire people with a clear view on how the organization will help shape society.

Courageous: take considered risks that propel society forward and appeal to the cultural need for progress.

Sincere: certain paradoxes are allowed (ie individualism and collectivism), contradictions are not. From the choice of plastics and fuel to the fit of corporate shareholders, decisions must stack up.

Empathic: understand the values and ethics of the man on the street and what more can be done to help or inspire him.

Transparent: be honest about what you're doing, and importantly what you are not doing

Efficient: strip out excessive bureaucracy and hierarchy. Small central management, larger front line service drives relevance.

Practical: satisfy individual needs first by delivering actionable solutions that give people greater control over their lives.



The future of CSR

"Many companies believe they have a responsibility to 'give back' to society and to me this is wonderful - in the future....[businesses will] have to give to get."

Despite heavy investment in CSR (corporate social responsibility), many initiatives aren't impacting people's overall perceptions of brands

The concept of good corporate citizenship is ambiguous despite the resources that companies invest in CSR initiatives. A significant number of the Millennials and Baby Boomers we spoke to believe large corporations and governments have legitimized greed and a lack of morality. They note that "corruption and greed are becoming worse not better," despite the lessons of 2008.

Further, Millennials and Baby Boomers comments indicate that for corporate citizenship to be meaningful it can't be removed from people's day-to-day lives: it must address their routines, consumption habits, their hopes and fears. It's as much about fair pricing as it is about using corporate assets to meaningfully impact society and create positive change.

2012 will herald a new movement: Progressive Citizenship

The traditional way companies have approached CSR - as operations apart from day to day corporate activities, not within them - is divorced from the current cultural sentiment. Younger Millennials (16-22 year olds) strive to integrate positive contributions to society into their day to day lives. They do not necessarily see charity work as something voluntary and distinct from education, work or their personal lives.

Interestingly, in 1929, the Dean of Harvard Business School, Wallace B. Donham, indirectly predicted that businesses would have to step in and play a larger role in progressing society at some point.

"Business started long centuries before the dawn of history, but business as we now know it is new - new in its broadening scope, new in its social significance. Business has not learned how to handle these changes, nor does it recognize the magnitude of its responsibilities for the future of civilization."

Progressive corporate citizenship starts with helping me

Overall, progressive corporate citizenship begins with helping me, the individual consumer, making my life easier, more simple, helping me to make better choices and manage my day to day life more effectively. It then spans out to be about the collective, the community, the country, the world. Some of our participants, especially Millennials, believe corporations view CSR as a zero-sum game, a way to right other wrongs rather than a way to contribute.

"Big companies ruin communities in places like Africa or China with their factories. They kill local traditions and use up resources. Then they educate a few kids there and feel they've made up for all the bad things they've done."

For many, progressive brand citizenship includes simple things like employing people in my community, being respectful of employees, and saving resources. Innovative research and development efforts around packaging, plastics and fuel, aiding people in need, and advancing developing world, etc. then follow.

Integrating social reform into your brand strategy

"I think everyone is equally responsible [for improving society], no one company can do anything alone. Bigger companies have more pull though, so they should be the most encouraging."

Five distinctive strategies to integrate brand leadership with good citizenship emerge from our synthesis of the research. Each embraces one of the ways Millennials and Baby Boomers give brands permission to progress society. Each also incorporates the shift from a shareholder orientation to a more inclusive stakeholder driven one, albeit to differing degrees. Any one brand could uniquely blend two or more of these strategies to best reflect their individual mission and personality. Importantly, each strategy strives to integrate an element of social reform not only into communications but, also, into business and product initiatives.

The examples we've included illustrate how progressive brands are integrating good citizenship strategies today. Some of the initiatives are further out from day-to-day operations and not necessarily trading equity into the parent brand as effectively as they possibly could, while others are integral to a company's ongoing strategy and thereby helping to shape perceptions of the brand.

1. Inspirers of everyday life

Key insight: Help me to make my day to day life easier, less stressful and all around brighter.

Implications:

Product: Evolves how we perform everyday tasks, interact with one another or entertain ourselves. Relevance comes through individual authorship, simplification, adding beauty, personalization, embedding a social purpose or making everyday tasks just a little more pleasurable.

Culture: Vision-led, mission-focused. Emphasizes smart collaboration. Confident, positive, dynamic yet exacting. Strong, inspirational leadership. Values new perspectives and imagination; focuses on knowledge sharing. Unafraid to rewrite the rules for a category. Respectful of employees. Foundation and charitable efforts focus on inspiring disadvantage populations in line with the mission.

Marketing: Brand is clearly defined. Combine leadership with magic. Product offers a positive perspective on the world. Tone is upbeat, human and lively. Embraces an intuitive understanding of what brightens everyday life. Builds awareness of issues and changes attitudes. Offers passive and active ways for customers to inspire others lives.

Examples of initiatives:

Nike and The Girl Effect <http://www.nikeinc.com/pages/the-nike-foundation>

Gud from Burt's Bees: <http://www.gudhappens.com/h/footer/nav/company/about-us.html>

Lego Foundation and Lego Children's Fund: <http://www.lego-fonden.dk/index.php?id=95&L=1>. Also see: <http://aboutus.lego.com/en-gb/sustainability/the-topics-we-work-with/the-lego-foundation/> and <http://www.legochildrensfund.org/>

Zynga: <http://company.zynga.com/about> and Zynga Org: <http://www.zynga.org/>

ecoATM: <http://www.ecoatm.com/>

Waitrose: http://www.waitrose.com/home/about_waitrose/our_company/leckford_estate.html

Mrs Meyer's Clean Day: http://www.mrsmeyers.com/What_We_Believe



Integrating social reform into your brand strategy

2. Innovative techies

Key insight: Help me have the courage to dramatically advance or alter society in some meaningful way.

Implications

Product: Constantly evolving through R&D; embrace the belief that everything can be advanced.

Culture: Cultural orientation is more about being a boutique of entrepreneurs and inventors rather than an organization. Relatively flat structures. Experimental - values new ideas and doesn't punish risks. Embraces the need for spontaneity, improvisation and adventure. Uses company assets in meaningful ways to progress society. Values employees and recognizes every person is integral to success.

Marketing: Sponsors of creativity, entrepreneurship and R&D in different fields (science, environmentalism, the arts). Help consumers to leave a legacy though an emphasis that everyone is inventive. Consumers co-create with marketing and brand management. The brand image organically evolves through continuous engagement with consumers.

3. Influence through value

Key insight: Help me to sustain my life-style, to feel more in control of my future and self-reliant.

Implications

Product: Priced fairly for the level of quality. No hidden costs. In-store service emphasizes that the customer matters most. Staff aims to help customers make more responsible choices that are true to their expectations and individual situation. Responsible supplier management. Effective use of product ranges.

Culture: Customer sits in the center of the organization. Sensible with resources, a focus on reducing waste and motivating employees to be efficient in work practices. Accessible and inclusive employment. Fair to employees. Emphasis on supply chain and inventory management but not at the expense of fairness. Practical overall.

Marketing: Promotes conservative and responsible consumerism that first benefits the individual, then the local community and finally society. Visibly engaged in local communities - donating employees as volunteers (not just money) to causes. Communicates contribution through reduction of environmental waste and unnecessary costs (eg, packaging). Transparent policies and supplier relationships.

Examples of initiatives:

GE: <http://www.ge.com/thegeshow/>; also see <https://www.celebratewhatworks.com/>; and, <http://www.treehugger.com/economics/super-efficient-water-heater-first-new-product-roll-assembly-line-ge-appliances-50-years.html>

Google: <http://www.google.com/green/>

Raytheon: <http://www.justmeans.com/press-releases/Raytheon-Connects-Today-s-Technology-Innovators-With-the-Workforce-of-Tomorrow-During-National-Engineers-Week/8038.html>

Examples of initiatives:

Walmart: <http://walmartstores.com/AboutUs/8123.aspx>
Tesco: <http://www.tescopl.com/about-tesco/our-values/Personal.com>: <http://www.personal.com/> ←<http://www.personal.com/> (Delivering on the key insight and changing perceptions of value.)

Phil and Teds: <http://philandteds.com/en/chatterbox/philanthropic/buggies-for-good> (Value for the individual first, saving money through innovative solutions then enabling them to give back to the community.)

Trader Joe's: <http://www.traderjoes.com/about/index.asp>



Integrating social reform into your brand strategy

4. Leading by example

Key insight: Help me to feel proud of who I am and lead with integrity.

Implications

Product: Customer voice and anticipated needs sit side-by-side w/technology in product development. Continuous customer research. Emphasis on R&D. Support domestic and local suppliers.

Culture: Characterized by progress and forward movement. Campaigns for inward investment, advocate of community service, local or national pride and/or global connectedness. Non-profit foundation as an integral part of the business. Respectful of employees, customers, communities and the environment. Acting as the standard bearer for life flow: helping employees integrate work into life more effectively.

Marketing: Promotes pro-social behavior; emphasize responsibility is shared. Co-create/collaborate with customers on community and other charitable efforts - fund start-up foundations or social enterprises. Disclosure of information and strategies. Emphasis on progress through practices and products advancement.

5. Trailblazing social reformers

Key insight: Help me feel our collective power and our vision can change things for the long term.

Implications

Product: Products as platforms for social mission. Consumer behavior change is being sold as much as goods and services. Eco friendly, advocate for consumers, workers or suppliers, made with integrity.

Culture: Social mission is integral to the company's existence; for profit company with a non-profit ethos. Each employee feels like they have a stake in the mission and their contribution is making a difference. Honors diversity. Individual choices are respected and the potential in every employee acknowledged. Integrity in supplier and distribution chains as well as manufacturing processes.

Marketing: Focuses on unleashing collective power., galvanizing employees and consumers to experience giving or change of habits firsthand. Purchasing is a way of joining/advocating for the movement. Encourages high impact solutions: use visibility and presence to give people/causes a voice.

Examples of initiatives:

IBM: Corporate Service Corps: http://www.ibm.com/ibm/responsibility/corporateservicecorps/press/2011_16.html

Toyota: <http://www.toyotainaction.com/us-facts-and-figures/>

first direct: [http://www.lab.firstdirect.com/?](http://www.lab.firstdirect.com/?WT.ac=FSDT_HM_MSC1358)

WT.ac=FSDT_HM_MSC1358

North Face: <http://expeditionsustainability.com/basecamp/letter-from-the-president.php>

Chipotle: <http://www.chipotle.com/en-US/fwi/fwi.aspx>

Waitrose's Community Matters Programme: <http://www.number10.gov.uk/news/waitrose-win-big-society-award/>

Balfour Beatty: <http://www.balfourbeattyus.com/Media-Center/Inside-Stories/Balfour-Beatty-Construction-named-one-of-Fortune-s.aspx>

J&J Earthwards: http://www.jnj.com/responsibility/ESG/environment/Product_Stewardship/EARTHWARDS_TM

Cabot Creamery: http://www.cabotcheese.coop/pages/community_and_you/community_connection.ph

Examples of initiatives:

Tom's Shoes: <http://www.toms.com/our-movement>

Worldbike: <http://worldbike.org/about-worldbike-three>

Panera Bread and Panera Cares: <http://www.ronshaich.com/n-paneracares-video.php?v=29>

Thiel Fellowship: <http://www.thielfellowship.org> (This is about radically changing education.)

Mission Markets: <http://missionmarkets.com/>

Wholefoods: <http://www.wholefoodsmarket.com/company/history.php>

Ecoatm: <http://www.ecoatm.com/about-goal.htm>

Jamie Oliver's 15: <http://www.jamieoliver.com/the-fifteen-apprentice-programme/home/index>

Co-operative: <http://www.youtube.com/watch?v=knjMs6QsZPY;>

<http://www.co-operative.coop/green-schools-revolution/> and <http://www.co-operative.coop/join-the-revolution/our-plan/inspiring-young-people/apprenticeships/>





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As we've reviewed the data and compared each learning against the others, we have confirmed that not all Millennials in the US and UK are alike. In both countries, those who have entered the workforce have a somewhat different outlook on life than those still in school, although not necessarily as expected. Millennials between 23 and 30 years old are more optimistic, confident and even more assertive than their younger peers, perhaps reflecting that they have lived more than three-quarters of their lives in a boom period rather than a bust.

Younger Millennials, those 16-22 years old who have mostly come of age since the Sub-Prime Mortgage crisis, strongly echo their parents' economic fears when speaking about their futures. They are more serious than anticipated and worry about destiny - both their own and that of their country. We can't help but wonder if the recession will permanently mute their aplomb, especially when compared to older Millennials.



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Does the apple fall far from the tree?

Overall, Millennials attitudes are not significantly different from those of their Baby Boomer parents. They share similar traits although these manifest themselves somewhat differently.

- Millennials have a tendency to engage with activities they perceive to have some societal value and will contribute positively to their image and resume. While socially aware and intent on leaving a legacy, Baby Boomers display greater independence of thought.
 - Millennials' sense of self worth tends to come from being productive and participating in structured activities that enable them to measure their achievement. Baby Boomers are also focused on productivity; however, they also enjoy the empty time and space necessary to contemplate life. Baby Boomers strong sense of self-worth comes from within rather than from external sources; this may be a product of age rather than an inherent cohort trait. Instead of embracing the L'Oreal slogan *I'm worth it*, the Baby Boomer mantra is, *I deserve it* (meaning time to do what I want).
 - US Millennials (16-30 year olds) see hard work, education and career success as the keys to financial security. While male Baby Boomers in the US have strong career aspirations, US males and to a greater extent female Baby Boomers consider being frugal as the way to become financial stable.
 - Characteristically, Millennials leave little to chance. They are very aware of saving money to shore up their future. Although Baby Boomers are saving for retirement, too, some are only just beginning to plan for this despite retirement being imminent.
 - Millennials believe developing a better, more positive outlook on life is the route to fulfillment. Baby Boomers subscribe to this viewpoint to a lesser extent and instead believe spending more time with family will lead to fulfillment and contentment. While Baby Boomers likely did not have the same attitude as Millennials do at a similar age, it's probable that their current orientation is driven by life-stage.
 - Female Baby Boomers would like to spend more time pursuing their own interests and doing things for themselves; however, in practice they put other people's needs before their own.
- Older Baby Boomers, most particularly in the US, are not thinking about what they'd do with their retirement. Indeed retirement doesn't seem to be a realistic option for many, instead they remain focused on saving money, exploring secondary streams of income and developing other skills that underwrite their value as an employee or business person.

What unites a special relationship?

Many more things unite the US and UK than divide them, although as with the English language, there are subtle differences in the attitudes and perceptions we share.

- Deep concerns about the economy are prevalent in both countries, although the Eurozone crisis is another headache for UK respondents.
- People in both countries fear ongoing civil unrest: in the US, there's a worry the Occupy Wall Street movement may transition into a more violent protest; and, in the UK there's concern that the behavior exhibited in the London Riots will reemerge.
- Respondents in both countries feel their governments are dysfunctional and strongly desire clear, inspiring leadership.
- In both countries, people spoke of concerns over disintegration of the middle class and increasing polarization of the rich elite and poor; we did not assess, however, is if this fear has come from media coverage or personal observations and experiences in their lives.
- Millennials and Baby Boomers hope to save more money in 2012; most Baby Boomers also hope to spend less and cut out big and small luxuries, i.e. the daily latte, the annual holiday.
- Baby Boomers in both countries speak about giving back to others, although men and women talk about this in different ways. For men, giving back also included the idea of leaving a legacy, i.e. I'll set up an enterprise to help disengaged youth. Whereas for women, tending to the needs of their families and children sat alongside volunteer activities. With Millennials, however, there were differences between countries: commitment to charitable acts are very strong in the US and less marked in the UK. Further, in the US, concepts traditionally embedded in





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volunteerism and charity are no longer seen as activities to be done once a week outside the home. More and more, Millennials especially feel they are fulfilling these obligations in the way they conduct their day-to-day lives (adopting a child, recycling etc). In both countries, more than ever, these choices are defining lifestyles.

- In general, UK respondents reflect a more global outlook than their US peers. For example, while global warming was noted as a particular source of concern for UK males, 16-18 year olds and Baby Boomers, it was noted only once, by an American Millennial.
- US Millennial males (23-30 year olds) have audacious career aspirations. In contrast, many of the same age respondents in the UK speak about career progression in less aggressive terms and, instead, hope to get married and have children.

How is our cultural narrative changing?

Women, especially, hope that through developing a more positive outlook they can help foster a culture of self-respect and respect for others. Alongside this, the activities Millennials and Baby Boomers tell us they'd pursue if they had infinite time indicates the new cultural narrative they desire.

- Respondents comments indicate an overarching wish for something that is not centered on unbridled ambition and efficiency or even idle time but, rather, security, progress and greater creativity in day to day life.
- Helping others and furthering education are the top two pursuits.
- Travel, something that typically rates high when we ask this question, is amongst the top pursuits but further down the list than anticipated.

Many in the US and UK express a concern that, if our existing cultural narrative continues without strong leadership, civil unrest will increase.

- They believe a continued lack of leadership has potentially dire consequences. Millennials and Baby Boomers universally fear that protests such as OWS are heading towards a tipping point and could become violent.

- Some also discuss that even cathartic social media fueled movements are not a substitute for effective leadership.
- Many respondents wish for bold, progressive leadership that will take the US and UK from its current bipolar state of optimism and despair, towards a positive and reliable cultural narrative.

What makes a brand a leader?

The concept of brand leadership is intangible and somewhat elusive to both Millennials and Baby Boomers. They tend to substitute size and visibility for influence and purpose when citing brand leaders.

With faith in government very low, Millennials and Baby Boomers in the US and UK believe leadership brands have a responsibility to step in and help improve society. Yet, when asked to name specific brands that are leaders many US and UK respondents drew a blank:

- 27% in the US and 50% in the UK noted they could think of no brands that would exhibit real leadership in 2012.
- Of those that did name brands, responses were highly fragmented, even scattered, and varied by country.

With the absence of ideal leaders, people are filling the leadership gap through connecting with others with similar interests and concerns. (The long-term danger in this - and that some participants speak about - is in limiting their exposure to alternative opinions, people may also be curbing their creativity and inventiveness.) Social movements are clearly playing a cathartic role for some, providing a voice and a sense of belonging to something meaningful. Movements, however, will not ultimately fill the influence void people told us about, especially when they can be joined with little commitment - through the click of a like button while lounging on the sofa.

How do people define responsible corporate citizenship?

Our findings indicate that while foundations and CSR initiatives are good, a majority of those we spoke to don't



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pay much attention to them. Following, many respondents in the US and UK had great difficulty naming companies that are either good or bad corporate citizens (with good corporate citizenship defined as **acting responsibly toward society, people and the environment** and bad as acting irresponsibly with respect to the same).

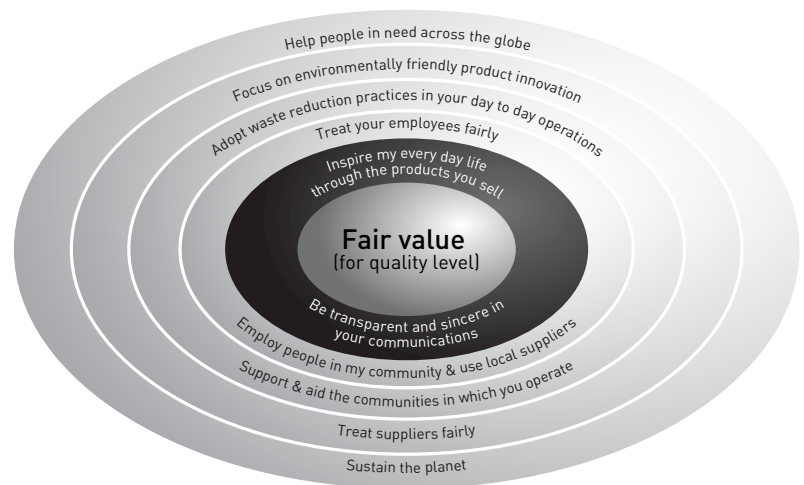
- 21% of respondents in the US and 44% in the UK could not specify any one company.
- As they were with respect to brand leaders, responses from those in the UK were more fragmented than those in the US.
- Respondents who did name good citizens tended to be aware of specific initiatives, with the one exception possibly being BP.
- With respect to companies that are the least responsible when it comes to society, people and the environment, in both countries a number of respondents named the banking/financial services (7% in the US and 10% in the UK) and oil and gas (9% in the US and 6% in the UK) industries rather than specific companies within them. These industries were selected for their *"greed"* and *"lack of respect for other people"* (often designated as the 99%) or the environment.
- A smaller number of respondents cited Government (3% in the US and 4% in the UK) as irresponsible, using rationale similar to that quoted by those naming banks or oil and gas.

Our study reflects a cultural sentiment that greed, and even making profit, is clearly viewed as bad today, and further points out that anything that overtly publicizes or emphasizes this is potentially harmful to corporate reputation.

Millennials and Baby Boomers indicate that corporate responsibility begins with helping me, the individual consumer, before it expands outward and, more specifically, includes the following behaviors:

- Fair pricing and ethics
- Being respectful of employees
- Working closely with mothers
- Employing local people from my community
- Saving resources
- Using assets to meaningfully impact society and create positive change

Good citizenship begins with fair value and then expands outward



Mingling brand leadership and citizenship

To better understand how well leadership brands are reflecting the new definition of corporate citizenship in their efforts, we have developed a Brand Citizenship Quotient (CitizenshipQ Scores)*. The Brand Citizenship Quotient essentially helps us to benchmark how much of a brand's leadership stems from its contribution as a responsible citizen or social reformer as compared to its market presence, pricing policies, visibility, etc.

Top brand leaders CitizenshipQ scores are below.

- A score of 100 indicates that a brand's contribution as a social reformer is equal its brand leadership,
- A score higher than 100 indicates a brand's contribution as a responsible citizen is greater than its leadership (this is most often due to smaller size and less visibility), and
- A score of less than 100 indicates that brand leadership is greater than social endowment.



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Brand Citizenship Quotient scores

(in order of top brand leaders)

US		UK	
Apple	45	Apple	26
Google	57	Google	47
Microsoft	98	Tesco	33
Facebook	17	Microsoft	27
Coca Cola	52	Virgin	44**
Walmart	-68	Nike	-13**
Ford	92	IOC/London 2012	N/A***
TOMS	100**	Facebook	-20**

*A brand's citizenship quotient is calculated as follows: (good corporate citizenship - bad corporate citizenship)/ brand leadership x 100

**Smaller or very small sample sizes

***No mentions for good or bad citizenship

Overall, CitizenshipQ scores for companies named by British respondents are lower than for those cited by Americans. This is more reflective of highly fragmented good citizenship ratings than leadership ones.

- Apple scores highest in both the US and UK on leadership and corporate citizenship, yet it does not have the highest CitizenshipQ score. This is likely reflective of the fact that while people see Apple as inspiring everyday life through shaping society and helping us to understand how interconnected we are, they do not necessarily associate the company with helping communities, aiding those in need or bettering the environment.
- Google, on the other hand, is more strongly associated with its green investments and its inclusive corporate culture and, hence, has a higher CitizenshipQ score.
- Microsoft scores extremely high in the US because of perceptions that the Gates Foundation is related in some way to the corporation. Accurate or not, the halo effect from the Gates Foundation is clearly real. In the UK, however, associations with the Gates Foundation are significantly less.
- Positive associations with Tesco's environmental efforts and fair value are somewhat offset by negative ones that they "*monopolise the sector and give no hope to independent farmers, green grocers, etc.*"
- Not surprisingly, TOMS, whose social purpose is implicit in its business mission, has the highest CitizenshipQ score. TOMS brand leadership comes from its social heart.
- The large number of people that see Walmart as socially irresponsible, mostly due to perceptions that "*it puts the little guy out of business*" and "*treats employees poorly,*" off-set those that see the company as responsible to the point of giving it a negative CitizenshipQ score in the US.
- Facebook has a low score in the US (the lowest amongst the top leadership brands) and a negative one in the UK, not necessarily because it behaves irresponsibly but because "*it's all about money now.*" Given that it's a relatively young technology company founded by a Harvard student, some people hold it to a higher standard and expect it to contribute more to society than networking.
- Nike scores negatively in the UK because of lingering perceptions of "*child slave labour.*"



DETAILED FINDINGS

Our outlook on the economy shapes our perspective

Overwhelmingly, people’s attitudes are being shaped by their economic outlook for the coming year. Fundamental concerns about personal safety, survival and even war all seem to be tied at least in part to the ongoing recession. For many, almost stereotypically especially those in the US, a positive perspective appears to be the way to dispel the looming uncertainty around what will happen next.

Most or second most concerned with....

	US			UK		
	global economy	world events	environ't	global economy	world events	environ't
Total	88.0%	68.7%	43.2%	84.0%	69.2%	46.8%
Mill'ials	86.7%	66.5%	45.8%	84.1%	66.0%	49.9%
Baby Boomer	90.2%	70.5%	39.3%	84.8%	73.6%	43.5%

(total base: 763)

Respondents were asked, “Which one of the following are you most concerned about....the global economy, the environment, world events. And which one concerns you the second most?”, a vast majority state they are most or second most concerned with the global economy followed by world events and then the environment. Differences in areas of concern by cohort and country are very subtle when comparing first and second most concerns. Not surprisingly, they increase when looking at the number one concern only.

Most concerned with....

[By generational cohort]

	US			UK		
	global economy	world events	environ't	global economy	world events	environ't
Total	60.1%	21.7%	18.1%	52.7%	27.4%	19.9%
Mill'ials	57.1%	21.3%	21.6%	43.9%	34.1%	22%
Baby Boomer	64.7%	26%	12.9%	62.4%	21.3%	17.2%

(total base: 763)

Baby Boomers in both countries are nearly equally troubled about the global economy, while Millennials in the US are somewhat and those in the UK significantly less so. Millennials in the UK are significantly more concerned with world events than the other groups, and those in both countries more worried about the environment than Boomers.

By gender, women in both the US and UK are somewhat less concerned about the global economy than men. Those in the UK are significantly more troubled by world events than men there, while those in the US are more focused on the environment.

Most concerned with....

[By gender]

	US			UK		
	global economy	world events	environ't	global economy	world events	environ't
Total	60.1%	21.7%	18.1%	52.7%	27.4%	19.9%
Men	65.3%	22.8%	11.9%	56.0%	21.0%	23.0%
Women	56.9%	21.0%	22.2%	50.0%	34.0%	16.0%

(total base: 763)

When asked, “Do you think your country’s economic situation will remain the same over the next year, improve in 2012 or worsen in 2012?”, four in ten (40.0%) Millennials and Boomers in the US respond improve as compared to 21.9% of those in the UK. More than half (50.2%) of those in the UK versus more than one-quarter



(27.8%) in the US state their economy will worsen, and 32.2% and 25.9%, respectively, cite remain the same.

than twice as often as those in households earning \$34,999 or less.

Those saying the economy in their country will improve in 2012

[By gender]

	US	UK
Total	562	201
Men	40.0%	21.9%
Women	46.1%	26.0%

(total base: 763)

By gender, in both the US & UK, men are significantly more likely to say the economy will improve than women.

Expectations for the economy in 2012

[By generational cohort]

	US			UK		
	improve	remain the same	worsen	improve	remain the same	worsen
Total	40.0%	32.2%	27.8%	21.9%	25.9%	52.2%
Mill'ials	37.5%	35.8%	26.6%	29.0%	30.1%	40.9%
Baby Boomer	43.7%	26.8%	29.5%	15.0%	22.0%	63.0%

(total base: 763)

By age, the patterns in each country differ. In the US, Millennials are less likely to believe their country's economy will improve or worsen than Baby Boomers and more likely to state that it will remain the same. In the UK, however, both Millennials and Baby Boomers are more likely to have a negative outlook on their country's economy in 2012, although Boomers are fifty percent more likely to state it will worsen than Millennials.

By income, the directional trend in both countries is similar. Those who are wealthier are more likely to believe their country's economy will improve in 2012 rather than worsen. In the US the pattern is significantly stronger than the UK, with those in households earning \$250,000 or more stating the economy will improve more



Hopes for 2012 are weightier than typical New Year's resolutions

When asked, "What are your top 2 or 3 personal hopes and goals for 2012 and how do you intend on accomplishing them?" respondents replied with answers weightier than the typical New Year's resolution. Although a few across all cohorts referenced losing weight, eating better and exercising more, many referenced more important and fundamental wishes, such as keep my house, find a full time job, stay at college, pay my credit cards off, and stay safe from crime. For Millennials and Baby Boomers in both the US and UK, keeping my head above water appears to now be an aspiration instead of something taken for granted.

"In 2012, I hope to keep my head above water until the economy improves."

"I hope to keep my head above water, maintain my lifestyle, keep my job and keep my house."

The economic downturn may have enforced a sense of financial responsibility and accountability in nearly all; the result being converging goals of Millennials and Baby Boomers. Significantly, the lightness and lack of responsibility we often think of as characterizing youth has nearly completely evaporated from the psyche of younger Millennials (16-22 year olds) in both the UK and US. This cohort in particular appears burdened down by the new responsibilities of youth. A seriousness focused on financial and job security consumes them far more than we would have expected.

"I hope to save money and become fiscally responsible."

"To attain \$10,000 in personal savings."

Completing college or furthering education is once again becoming aspirational - something that might become just too hard for some to do as they juggle work and study. Notably, younger Millennials (16-22) in the UK and US are involved with becoming more self-reliant. With the economy as it is, they anticipate paying for school fees on their own, without aid from their parents.

*"I hope to get a job to pay for college."
"I hope that I'll be able to pay for school."*

In part, employment is the enabler to managing money more effectively. The hope for employment encompasses finding work and making more money by progressing in a career. Starting one's own businesses was also a persistent hope. Many see it as a safety net to secure a secondary income and reduce the risk of redundancy.

The downward economy also has had an impact on the things people value. The new wealth is spending time with valued people and enjoying experiences over material things. Females hope to spend more time with their families and value their friends more so than males. This may be a way of escaping their somewhat depressing reality. Females and males in the UK in particular aspire to travel. They hope this brings new experiences and opportunities to learn about different cultures. (Although US participants would also like to travel, they did not speak about their interest in travel here but, rather, in another question, which we review later in this report.)

Themes for top personal hopes and goals for

	US		UK	
	Men	Women	Men	Women
1	Manage money more effectively	Complete or further education	Manage money more effectively	Find or keep a job
2	Progress in my career	Manage money more effectively	Extra curricular engagement & travel	Make time for family or valued friends
3	Find or keep a job	Progress in my career	Start my own business	Extra curricular engagement & travel
4	Start my own business	Develop a better outlook	Complete or further education	Complete or further education
5	Complete or further education	Make time for family or valued friends	Find or keep a job	Develop a better outlook



Hope: Manage money more effectively

Millennials and Baby Boomers life goals appear to be converging largely driven by the economy. Achieving immediate financial stability and long term security is a consistent hope.

Most Baby Boomers in the US and male Baby Boomers in the UK express a hope to become financially stable in 2012; they plan to pay off debts (mortgages, other loans and credit cards) and save more.

"To pay off my debt."

"To be financially secure."

"Become mortgage free, stay out of debt and cut the cards up."

Millennials in the UK and US hope to be more financially secure during 2012; a serious expectation that can belie their life-stage, yet is consistent with their generation's characteristic perspective on productivity and resume building.

"To get rid of credit card debt, have less loans, save money and be financially secure."

"Pay off half the mortgage."

Notably, in the US, Baby Boomers aspire to be more frugal and conservative during 2012, a hope which was expressed less consistently by those in the UK.

"I plan on spending very little in 2012; I will only use cash and we'll have no vacations."

"I won't spend things that aren't essential."

"I will cut back."

56-64 year old females in the US are proactively making investment decisions, which their peers in the UK don't appear to be doing (or at least don't speak about doing).

"I will make wise investment choices to prepare for retirement."

"I will plan for retirement and ensure savings and investments meet my changing needs."

"I will spend time putting more money into investments."

People's desire to become more frugal and better control their money reflects a need to retain greater control overall and their mistrust of institutions to some degree. The ultimate hope for Baby Boomers is to become financially free - or at least independent - during 2012.

"I will become independent for the sake of my family."

Millennial males (16-30) in the UK have a similar attitude to US Baby Boomers. They believe saving more and spending less is the way to achieve financial stability. They reference paying bills, keeping their homes, reducing the mortgage, and get rid of other debts in their hopes.

"Improve my financial situation by getting more savings and a cheaper lifestyle."

"To pay off half the mortgage."

"To cut down on my costs and therefore improve my finances."

In contrast, male Millennials in the US plan to become financially secure through career success, believing their drive and ambition will ultimately earn them more money.

"In 2012, I hope to quadruple my income."

Hope: Find or keep a job

There is an emerging need for self-reliance which distinguishes younger Millennials (16-22 year olds) from their older peers (23-30 year olds).

Finding employment or staying employed is a universal hope, although it was not necessarily in the top five for all groups. Respondents comments indicate this hope is driven by the need to become much more self-reliant. Self-reliance is particularly evident amongst younger Millennials, 16-23 year olds. Perhaps this is not surprising given that this group represents the kids who are transitioning into adulthood in parallel with the prolonged economic downturn. It is possible that the persistent, negative rhetoric of this period has formed their outlook, expectations of themselves and the extent



to which they can safely rely upon their parent's financial support, especially when compared with older Millennials. Some have been directly affected by financial challenges as their Baby Boomer parents have lost jobs and their extended families or neighbors have faced foreclosure.

In response to circumstances and events, this younger group of Millennials, in the US and UK, appear to have adopted a more exaggerated adult mantra than is typical of their generation and more marked when related to that of their older peers (23-30), many of whom who relied more on their parents to help them out financially while attending university or entering the workforce.

"I need to get a job so I can make a living and go to college; I can't have other people supporting me all the time."

"I plan to get a job so I can complete my college course."

For many, nothing is a given any more. Getting a job, any job, or having stable employment is now aspirational for a large number of respondents.

"I hope to get a full time job and I will job hunt and job hunt."

"I hope to have stable employment."

Although many younger Millennials see funding their education as their responsibility, Baby Boomers still hope to help their children financially in 2012:

"I hope to start a college fund for my kids."

"I'll take on a second job to make more money for my family."

"I'd like to see my daughter through higher education and generate more income to do this."

Hope: Progress in my career

American and British Millennial males (23-30 year olds) have very different outlooks when it comes to their careers.

As previously noted, older Millennial males (23-30) in the US believe career success will help them achieve financial security more so than other respondents. Their hopes for 2012 are dominated by lofty career goals, and their tone is marked by their intense ambition.

"To further advance in my job and get promoted."

"To get a higher paying job, I'll work hard to get it and let nothing get in my way."

"To relocate to London and work for a competitor."

Although their UK peers are committed to work, they don't aspire to achieve in the same way that characterizes their US counterparts. Career aspirations for 23-30 year old males in the UK are more measured; they are about gradual improvement rather than getting ahead of the pack.

"To get a better job."

"To improve my career prospects."

US Baby Boomers are notably more ambitious than their UK counterparts. They see themselves as the architects of their financial freedom. In 2012, they hope to accelerate their financial stability. And, although this drive and ambition is perhaps more pronounced today than pre-2008, we can't help but wonder if it's attributable to a difference in cultural orientation between the UK and US.

"I hope to get promoted to executive from Vice President."

"I hope to expand my business by 300% (revenues) by increased sales and marketing efforts."

I hope to get promoted and get a good raise."

Hope: Start my own business

Many see starting one's own business as a way to achieve security and control in a complicated world.

Safety nets people once relied upon have been reduced or taken away: career longevity, job security and governmental support (most dramatically in the UK). And, they perceive once trusted institutions, such as



banks and governments, as symbols of corruption, greed and power. Not surprisingly, Millennials and Baby Boomers have become more mistrustful about the motivations of corporations and governments.

"I'm concerned about the amount of corruption occurring in financial institutions these days."

In response to their mistrust, a large number of respondents hope to become their own boss. In the UK, this is most prevalent among 16-18 year old males, 23-30 year old females and 47-55 year old females. In the US, younger Millennials (16-22) and older Baby Boomers (56-64) consistently express the wish to become their own boss.

US

*"Start my own cleaning franchise."
"Start my own hand-stuffed animal business."
"Become wealthy by starting my own Internet business."*

UK

*"I hope to start a gaming channel on youtube with other students from college."
"To start my catering business."
"To start my own business and generate enough income to do what I want."*

Millennial females, most notably those aged between 23-30 years old in the UK, hope to gain greater control by establishing new career paths that flow work into life more effectively.

*"To get a job that lets me work from home so I can look after my kids."
"To get a job with more flexibility."
"To get a job that fits around my kids."*

Hope: Complete or further education

Millennials are willing to work even harder to integrate study with work as a way to complete their education.

Most Millennials in the US and UK hope to complete and/or further their education. Not surprisingly, given their life-stage, younger Millennials (16-22) are the most intent on this goal. For many, embarking on higher education or completing it is a hope not a rite of passage.

*"I hope that I'll be able to complete college."
"I hope with the rise in tuition costs that I'll be able to stay at school."
"I hope I'll be able to afford to go to university with fees at £9,000 per year."*

Universally, Millennials believe working hard will enable them to achieve their educational dreams and that this qualification will help them to succeed.

*"To get my AS level grades through working hard and perseverance."
"To complete my course and obtain my degree by working hard and sacrificing sleep."
"I will improve my grades by applying myself and working very hard."*

While Millennials in the UK hope to achieve good grades, the quest for the highest grades appears to be more of a cultural marker in the US.

*"I will study as hard as I can and keep applying myself until I get the opportunity to pass my calculus with a Grade A."
"I plan on taking an MBA and getting high grades."*

Hope: Extracurricular engagement and travel

Extracurricular activity is perhaps the most relevant way to describe how Millennials wish to use time away from work or study.

Some Millennials hope to spend more time engaged in leisure pursuits in 2012; however, this was less marked than one might expect given media's focus on time spent on Facebook and watching Internet TV. Very few Millennials in both the US and UK wished for more leisure time. Although this could in part be symptomatic of where they are in life, we surmise it's more likely



reflective of their rejection of free time and preference for productive pursuits and CV/resume building.

Indeed, Millennials perform best when their time is structured with specific objectives to work toward. In 2012, they hope work and study will be supplemented with purposeful extra-curricular activities, which satisfy their need to be productive and thereby feel worthwhile.

*"I plan on learning how to play the piano. I will commit 30 minutes each day to this."
"I will win the Yorkshire cup through effort and talent, a hard training regime, concentration and belief."*

Baby Boomers are more open to the pursuit of experiences for experience sake. In the UK, Baby Boomers hope to travel during 2012, something which was not as prevalent an aspiration for their US peers.

*"Take a year off and travel the world."
"Take more long haul flights."
"See the Northern Lights again and start afresh somewhere."*

The exception being older male Baby Boomers in the US (56-64), some of whom hope to travel in 2012 and pursue activities they've dreamed of:

*"Tour Route 66 with my brother."
"Run a sub 3:20 marathon."*

Hope: Develop a better outlook and be more respectful

Self respect and respect for others is the desired cultural narrative, especially for women in the US and UK.

"I would like to become the best person I can be."

Female Baby Boomers in the US and UK, alongside all Millennials in the US and female Millennials in the UK, hope to become better people in 2012 through a more positive outlook. They see greater freedom to be happy, have fun, have the confidence to take risks and live

creatively as the potential benefits of a more positive and outward looking orientation.

*"To have fun and happiness."
"To lead an adventurous life with many risk."
"Live creatively and enjoy what I have."
"Have fun."*

Respondents relate having a better outlook to self respect and respect for others. Their comments further indicate that these things are built upon three pillars: compassion, confidence and making good choices to protect oneself and others.

Compassion

*"I plan on being patient and nice and respectful to my family."
"Be patient and compassionate and slow down and get to know people better."
"Love more by putting out love."*

Confidence

*"I will become emotionally healthy by having a more positive outlook on life."
"I would like to be more self-confident."
"To market myself better."*

Good choices (protect and look after self)

*"Be nicer to people and myself."
"I will continue to sift out the negatives in my life and not feel guilty when I shouldn't."
"To reduce stress by eliminating stressful people and events."*

Hope: Make time for valued friends and family

Genuine relationships and face to face time are an important source of comfort.

Few respondents express a desire to acquire material things. Instead, Baby Boomers and Millennials (women), most notably in the US, hope that 2012 brings opportunity to spend more time with the people they genuinely value, and in turn, they hope to support these people more.



Spending more time face-to-face is more important than remote relationships.

"Spend more time with those that matter most."

"To be lucky enough to have more years with my husband and spend more time with my grandsons."

"Be with the people I love."

"Ensure my parents are emotionally, physically and financially provided for through daily involvement and support."



Due to the unstable economy, people are fearful of crime and increased violence

Concern over uncertainty about the economy, combined with the perceived absence of inspiring leadership is increasing people's anxiety levels. When asked, "When you think about your own life, your country and society at large, what 2 or 3 fears or concerns do you have for 2012?" Millennials and Baby Boomers in the US and UK universally cited increased crime and violence, albeit to varying levels. As budgets continue to be cut or frozen in public and private sectors and as people compete for fewer resources and jobs, some respondents further tell us they are somewhat concerned anxiety levels will boil over and people will turn on each other. Some predict societal unrest, some even civil war, as tensions simmer beneath the surface and can no longer be contained.

"I fear violence will grow because of people's frustrations with the economy and the bozos in Congress."

"I fear a large scale war, that the whole of society will go up in flames."

Perceiving political leaders are meddling too much in foreign affairs, other respondents are also anxious that their country will become a more attractive target for terrorist activity. In the UK, a number state that the forthcoming Olympics Games is a perfect high profile and symbolic target for potential insurgents.

Not surprisingly, unemployment is a universal concern. Younger Millennials (16-22) in particular worry about finding work to fund college or finding a job to enable them to become more independent. A number of older Millennials (23-30) who are intent on establishing their careers are apprehensive that they they'll be forced to accept unfulfilling work just to survive, let alone to pay off debts. That is, if they can get a job at all.

"I worry there are less jobs and more competition, every job requires experience so it's hard for a fresher [freshman] to enter the industry."

"I worry the jobs market will be dry - I won't be able to get a job where I want, doing what I want."

"I worry I won't be enough jobs for everyone."

Many Baby Boomers in the US and UK are anxious about their immediate and longer term financial security; they worry about losing their jobs, not being able to save for retirement and/or not being able to provide for their families. Some wonder if poverty and homelessness is only a step away as Medicare (US) is reduced and cuts in the National Health Service (UK) are evident. A number state that the middle class will collapse under the weight of increased taxes and budget cuts.

As noted previously, all cohorts in both countries discuss their concerns about lack of effectiveness in government and inspiring political leaders. Many believe strong leadership will be crucial to stabilize society and re-instill the lost sense of national identity and pride. Some tell us that developing a stronger identity on the world stage is essential to attract domestic investment and prevent jobs being off-shored to countries with more distinctive reputations.

"There is a lack of courage and integrity in Government leadership; we have poor leaders who demonstrate selfish motives. They do not represent the voters."

In the US, some Millennials and Baby Boomers are more concerned about the loss of civil liberties and lack of transparency in government. Allied to this are their observations that corporations and institutions are becoming more, not less, corrupt despite the events of 2008, which many believe should have strongly sent the message that greater openness and integrity is critical. A number believe that government is as responsible for the legitimization of greed, decline of moral values and rise of individualism as are corporations. This sentiment is also reflected in the UK although somewhat less apparently so.

"This country (US) is going down the drain; there is too much government and too much corruption."
"Lack of morals and values has meant money is more important in our society than caring for people."
"What's happened has been all about greed and no one has prospered."



"I fear the people of this country will lose their faith in our system and everybody's spirits will break; we'll be like other countries where young people don't have reasons to believe that through education or training they can get ahead."

Themes for top fears and concerns for 2012

	US		UK	
	Men	Women	Men	Women
1	Increased crime & violence	Increased crime & violence	Increased crime & violence	Unemploy't & financial uncertainty
2	Unemploy't & financial uncertainty	Unemploy't & financial uncertainty	Unemploy't & financial uncertainty	Reduced government support
3	Lack of clear & inspiring leadership	Disintegrating national identity	Lack of clear & inspiring leadership	Increased crime & violence
4	Loss of civil liberties	Lack of clear & inspiring leadership	Global warming	Lack of clear & inspiring leadership
5	Disintegrating national identity	Increasing corruption & greed	Increased immigration	Disintegrating national identity

Fear: Increased crime and violence

People are concerned about personal safety, the stability of society at large and for their lives.

The fears of 16-18 year old Millennial females stand out as the most extreme and alarming, especially in the US. Some of their fear stems from the Mayan prophecy that the world will end in December 2012, http://en.wikipedia.org/wiki/2012_phenomenon. We can't help but wonder, though, if the economy and world events were in a more certain place if this fear would be less prevalent amongst this group.

*"Dying and the world ending."
"The world will end; we'll all die."*

Their nervousness about the end of the world appears to be reflective of a generalized state of anxiety linked to the consequences of living through the economic crisis.

*"Life is destroyed by war and the government falls apart."
"We will run out of resources and people will get meaner."
"I fear the world will become a dangerous place that's too violent to enter."*

While the scenario they paint may sound extreme, 19-22 year old women reflect sentiments similar to those of the younger Millennials.

*"I fear morals will continue to disappear and food supply cannot meet demand."
"I fear as the economy gets worse, the city and the drama and fights will get worse."*

Women 16-22 in the US express some frustration over American leaders focusing on other countries' affairs and not investing sufficient resources on righting the US's problems. They fear anti-American sentiment may spill over into war or terrorist activity.

*"If we don't do something about the economy something drastic will happen like a nuclear war."
"The US needs to stop meddling in the affairs of other countries, this could lead to war and possibly human extinction."*

16-18 year old US men are less anxious. However, they too foresee dramatic consequences if the economy continues to struggle, with some believing famine and war are real possibilities.

*"We'll be waging wars on each other."
"Apocalypse."*

In the UK, Millennial males are also concerned about the prospect of increased crime levels and violence. Interestingly, a number of those 16-18 speak more about the effects of global warming, fearing that governments are not doing enough to address this issue in a world they perceive is becoming too self-absorbed and less civic



minded. This youngest group of men also discuss the increased threat of terrorism that could accompany the London 2012 Games.

"I'm worried about the effects of global warming and what it means for our long term survival; it's an extremely important issue that's not being addressed through education."

"The 2012 Olympics concerns me - there's a high chance of terrorism in that area."

Baby Boomers, too, speak about feeling more unsafe and insecure about the safety of society at large.

"Cut back on budgets for people in need of services like heat and food. If this continues I worry there will be an increase in crime and a very high cost to society as a whole."

"The cut backs for people in need of services, like heat and food, means there will be an increase in crime and a very high cost to society as a whole."

Baby Boomers in the US are universally concerned about increased threats to national security.

"I fear for our national security; I fear with so much unrest in the world something disastrous will happen."

"Iran's nuclear program and MiddleEast uprisings lead to anti-Americanism."

Some US female Baby Boomers, in particular, worry about personal safety as people grow increasingly frustrated with the stalling economy.

"I fear violence will grow because of people's frustrations with the economy and the bozos in Congress."

In the UK, a smaller number of Baby Boomers are uneasy about an increase in crime and lawlessness.

"I worry about society becoming more lawless with no deterrent if someone goes off the straight and narrow."

"I'm fearful about crime rising and lawlessness."

"I fear violent knife crime, and terrorism we're making too many enemies."

The Eurozone crisis adds an additional layer of uncertainty for people in the UK. Younger male Millennials (16-18) and younger male Baby Boomers (47-55 years old) have anxiety over potential shock waves if the Eurozone collapses.

"I think about what will happen if the Eurozone collapses and family members lose their jobs."

Fear: Unemployment and financial uncertainty

Many are readjusting their hopes and expectations; lower order needs such as food and shelter are aspirational for some.

Millennials and Baby Boomers on both sides of the Atlantic are united by a concern over the continued economic uncertainty and its effects. Many worry that the fundamentals of life (heat, shelter, food) could no longer be givens in their lives.

"I worry about another dip in the economy, where buying something like fresh fruit every couple of days becomes a struggle to fund."

For some, their worries are impacting their life plans and forcing them to readjust their expectations for the future accordingly. Many younger Millennials (16-22) in the US are anxious about the prospect of not going to college or being forced to drop out of because of lack of funds.

"I worry about money and whether I'll be able to pay for school."

"I'm concerned about keeping both of my jobs at the end of 2012; as the economy worsens my fears for my financial security increase. I'm also fearful for my school situation: tuition keeps on increasing and soon I won't be able to afford to go."

"I worry about loss of jobs and financial aid. I worry about my parents facing financial difficulty."



In the UK, many younger Millennials (16-22) are concerned about finding a job and having a cash stream rather than being concerned about paying for college per se.

*"I'm concerned no jobs will be available and we'll enter another recession."
"I worry about not having a job, not having any money and not being able to pay the bills."*

As some younger Millennials (16-22), especially females, have readjusted their expectations for what they view as the new reality, they appear to grow disillusioned and have begun to question their self-worth.

*"I will not be able to get a job and I'll be forced to stay in this underpaid, abusive position because my degree is worthless, despite all my education and hard work. That makes me feel terrible."
"I'm afraid the people of this country (US) will lose faith in our system and everyone's spirits will break; we'll be like other countries where young people don't have reasons to believe that through education or training they can get where they want."*

A large number of Millennials are also fearful that the job situation will get worse and leave a negative legacy for the next generation.

*"I worry the debt will get passed down through the generations and the government will make the same mistakes over and over."
"The next generation like my brother won't be able to get a job because there are none."*

A small number of older Millennials (23-30) are concerned about the prospect of a worsening economic situation and what this may mean for them or their families as governmental benefits are reduced (UK), cash flow is restricted, moving up is more difficult (trading up jobs and houses), their children's education is compromised, and community resources are stretched.

"I'm worried that important societal and educational issues will be put on the back burner as budgets are cut."

"I fear the economy will worsen and I'll end up living paycheck to paycheck."

A small number of Baby Boomers in the US and UK, most especially women, are focused on immediate financial stability and long term security. Some foresee dire consequences and fear being forced to make stark choices.

*"Poverty is the next stage."
"I'm worried about my benefits being cut, I feel penalized for being disabled. I'll have a choice: eating or staying warm."*

A number of Baby Boomers are also concerned that their quality of life, in both the near and longer term, is being significantly compromised. Some also cite the disintegration of traditional structures that stabilize society (i.e. the family, marriage) as source of worry.

*"I'm worried about saving for retirement and saving money for house repairs."
"I'm worried about job losses, this is a great concern for me, not having enough money to pay the essential bills."
"If businesses continue to downsize and more people have no means of support, families will disintegrate due to the financial pressure."*

Fear: Lack of inspiring leadership

A lack of inspiring and relevant leadership is the biggest inhibitor to economic growth and societal stability.

Millennials and Baby Boomers in the UK and US express frustration over a lack of relevant, inspiring and effective leaders. Many believe institutions of all kinds (corporations, governments) are becoming more, not less corrupt and fewer organizations can be sincerely trusted.

"There is a lack of courage and integrity in the current leadership."



"I'm concerned about the amount of corruption occurring in financial institutions these days, I'm not sure my money is safe."

"I'm fearful lessons haven't been learned; they're not being straight with us and another bank will go bankrupt."

"We have a severe lack of political leadership to get us out of this mess."

In the US, where respondents tended to be more politically engaged, likely because of the Republican primaries and the forthcoming Presidential election, a large number of people believe those in government are removed from the values and needs of the people they represent. Many respondents, most notably Baby Boomers, further tell us that the existing government is going in the wrong direction, one that is at odds with the foundation of the American identity and the economic system.

"America is a mess, they [Government] are only concerned with those who are already well, the country needs a wake up call."

"I fear the Republicans will continue to push us to go to war in places we don't belong."

"I fear socialism."

"I fear our President is focused on a socialist agenda."

Many respondents perceive that government leaders are becoming more self-serving and are motivated more by what's good for them and their supporters rather than the things that will benefit society. Some Millennials and Baby Boomers are further united by their fear that societal values will deteriorate further and intimate values such as greed have been legitimized by society through role models such as banks and politicians.

"I fear the Government will be overrun by people who want to serve only the needs of their families and supporters and this will lead to cutting of funds in unnecessary places."

"Whatever Government is in they will be out of touch with what people want. This does concern me. Lack of morals and values and money seem more important than being a caring and helpful government."

"This country is going down the drain (US), there's too much corruption in government and it's only getting worse."

"I worry my country will deteriorate and society will become more interested in things rather than people."

"We've lost compassion for others; we're about Greed and Technology with too much violence."

A small number of female Baby Boomers in the US are growing suspicious of the unspecified "rich elite." It's as though anyone who is perceived to be part of the 1% is considered untrustworthy, irrespective of their personal values or work ethic. Despite this most Baby Boomers celebrate diversity and are relatively open minded, something which is exhibited in their comments about experiencing different cultures and traveling.

"I fear that healthcare will be something that only the rich can afford."

"The rich elite will continue to lead us and rob us of our rights."

"As usual the rich get richer and the poor get poorer."

"I fear the widening gap between rich and poor, the 99 % and the 1%."

In both the UK and US, potential changes in leadership and/or administration are at the forefront of people's minds. Those in the UK question the longevity of the current Government. A state of apathy is apparent in both countries; a large number of respondents are not convinced real change is possible and, as such, do not believe new leadership will improve the situation.

"A new President could worsen or improve the state we're in."

"I'm worried about more political candidates who bring about no positive change."

"I fear the Government will continue to struggle and we won't get out of this mess."

Some Baby Boomers in the US are also frustrated by the bureaucracy and inability of political parties to work together, something which further stalls progress.

"I fear more gridlock in government."



"The bickering in Washington and their inability to get anything done is a real problem."

Fear: Disintegrating identity

People are disillusioned about what it means to be British or American and believe "the middle class" is collapsing.

As noted in the media, both the US and UK are experiencing national identity crises. A lack of confident leadership and relevant governance is perhaps contributing to individuals reluctance to celebrate Britishness or Americanism. Respondents tell us that leaders fail to inspire and as a result they believe their country is less distinctive.

In the US, some Millennials (males 23-30) and Baby Boomers, are concerned about increasing disillusionment with Americanism. Baby Boomers are particularly fervent about reclaiming the US's status a leading employer and *"taking back our country."* While younger male Millennials hope to recapture the country's lost status as a global superpower.

"This country (the US) is going down the drain and it's only getting worse."

"We've lost our status as a relevant superpower in the world."

"We've become a great financial failure."

In the UK, some Millennials (females 23-30) feel it's become inappropriate to celebrate Britishness. Swelling immigration figures are offered as the rationale, something which is also reflected by Baby Boomers.

"Britain isn't Britain anymore; we're not allowed to celebrate our own culture. I think the human rights acts have gone mad - you wouldn't get this in any other country."

"Immigration has to stop; the last thing Britain needs is more people."

Many see the identity crisis manifesting at a socio-demographic level. Some older Baby Boomers (56-64) in both the US and UK fear a potential collapse of the middle

classes. They tell us that in the boom time the boundaries that defined middle class shifted: most of us could define ourselves as middle class. Now they believe most people lie on the fringes and don't know where they fit in society and the working wealthy may become the new middle class as they extrapolate themselves from the 1%.

"I worry about the disintegration of the middle class."

"I fear the collapse of the middle class."

"I worry that my benefits will be taken away and I have two young children who depend on me, working tax credits being reduced worries me most."

Fear: Loss of civil liberties

Millennials are increasingly guarding their privacy and personal information as they question the integrity of the organizations they once trusted.

Freedom of expression, human rights and connectedness are part of Millennials' cultural experience and are virtues Baby Boomers closely guard. However, due to SOPA, a number, especially male Millennials 16-22 in the US, believe the freedom to share information and openly exchange opinions may be the very thing that threatens liberty.

"SOPA act, all it does is ban the Internet; everyone uses it everyday so the government should be ashamed of this bill."

For Millennials and male Baby Boomers, concerns about civil liberties correspond with an apprehensiveness about large, excessive government and an interventionist approach that threatens free-speech, innovation and independence; things they label as fundamental principles of US culture.

"The government is taking away civil rights and imprisoning us."

"I fear that we'll lose our liberty combating terrorism."

"There's excessive government and too much meddling."



"I fear my country may be hiding something from its citizens and its something huge and that my life may be danger."



Brand leadership is intangible and being redefined

The concept of brand leadership is intangible in many ways to both Millennials and Baby Boomers. Although they tell us they believe brand leaders should be visionary, inspiring and helping to progress society, in the absence of this they appear to substitute size and visibility for influence and purpose when citing brand leaders.

When specifically asked, “Which 2 or 3 brands do you think will exhibit leadership – whether it be leadership through category innovation, social responsibility, ways of working, environmental consciousness, etc. – in 2012 and why?” many respondents in both the US and UK drew a blank; 27% in the US and 50% in the UK noted they could think of no brands that would exhibit real leadership in 2012. Of those that did name brands, responses were highly fragmented, even scattered, and varied by country. That noted, in both countries, Apple, was cited significantly more than any other brand with Google receiving the second most mentions. In the US, Millennials and Baby Boomers consistently cite the same brands as the top three. In the UK, however, Millennials are directionally more likely to name Tesco as third than Baby Boomers, who choose Virgin followed by Microsoft over Tesco.

Top five brand leaders

(more than one mention allowed)

US		UK	
Base: 410	782 mentions	Base: 100	199 mentions
Apple	22.0%	Apple	17.1%
Google	7.7%	Google	7.5%
Microsoft	6.1%	Tesco	6.0%
Facebook	3.7%	Microsoft	5.5%
Coca Cola	3.4%	Virgin	4.5%

Inspiring everyday life

Respondents can readily pinpoint why they name Apple as a leader, something that they cannot necessarily do for other brands mentioned, so it’s no wonder it is cited considerably more than any other brand in both the US and UK. Apple clearly inspires every day every day life for many. Although some Millennials and Baby Boomers name it because *“it’s a large company and many people buy their products,”* most speak about its *“proven history”* and the ways in which Apple has transformed the way they do things:

“They are constantly coming up with new projects that revolutionize our way of living.”

“They have changed the way we communicate.”

“They have the most influence on entertainment devices and how we use them.”

Leading with technology innovation

When asked in what ways Google exhibits leadership, the majority of people in both the US and UK have greater difficulty naming specific reasons and cite the more generic reason *“[they’re] innovative.”* One or two, however, speak more specifically about how *“they are constantly evolving, trying new things and give away a lot for free.”*

Most respondents who name Microsoft speak of its size and nonspecific innovation. A small number further note, *“[they’re] always improving their products”* and *“[they’re a] great company, great leadership.”* Interestingly, there is a halo effect for Microsoft from the Gates Foundation; several respondents, especially in Britain, reference the Bill Gates and the Foundation when discussing Microsoft as a leader, *“Bill Gates becomes even more philanthropic which makes Microsoft more of a leader in society.”*



Relevance through value

For some, leadership brands are those that *“do more for them.”* When this comment is considered in context of the economy and respondents’ concerns about their future, it’s no wonder that Millennials, even more so than Baby Boomers, mention brands such as Tesco in the UK and Walmart (ranked 6th) in the US. Although those who named Tesco as a leadership brand didn’t cite specific reasons for doing so, in the US, many told us that Walmart is a leader for its size and fair pricing.

“...because they’re the largest corporation in America right now.”
“They helped thousands of people to a job.”
“Because their prices are competitive and in this economy that’s important.”

Also in the US, but named less often than Walmart, Old Navy is also noted by Millennials for its *“affordability.”* In the UK, Asda, which is owned by Walmart, was cited for similar reasons, *“constantly striving to make prices lower and help their customers.”*

Leading by example

In the US, the Baby Boomers that name Ford (ranked 7th) as a leader see it as a model for recovery from economic pressure and a reason to believe in the American spirit. Believing in Ford’s leadership seems almost like an act of patriotism for some. Those in the UK did not exhibit that same sense of national pride in any of the brands they mentioned.

“[Ford is] making a comeback; making it easier to buy and believe in American.”
“The company has made huge steps forward in a tough time.”

Inventive social reformers

Brands such as TOMS in the US and Fairtrade in the UK are named as leaders because of their social missions.

TOMS - *“This marvelous company gives away a pair of shoes (to children in need) for every pair sold. This is not a gimmick, or anything new - it’s how they have done it from day one.”*

Fairtrade - *“It will ultimately stop exploitation.”*

Other more mainstream brands that exhibit efforts to create a positive impact on society are also cited as leaders suggesting that practicing responsible corporate citizenship in daily operations may soon be a mandatory characteristic for brand leaders.

Other inventive social reformers in the US:

Chipotle - *“They are attempting to return to grass fed beef, in a country where grass-fed pesticide infected beef rules.”*

GM - *“Developing new vehicles beyond electric cars.”*

IBM - *“Improving the world in general with technology.”*

Kraft - *“Making products more affordable to more people and healthier products.”*

Northface - *“Very charitable and eco-friendly.”*

Proctor and Gamble - *“Making more products to help our environment.”*

Toyota - *“Because their cars are becoming more and more friendly to the environment.”* *“They seem to be perfecting non gasoline autos.”*

Whole Foods Market - *“They treat their employees with respect and get loyalty in return.”* *“Healthy food, responsibly produced, with quality a priority.”*



Other inventive social reformers in the UK:

BBC - *"[They] are the only news source offering a reasonably impartial look at the world."*

Innocent Drinks - *"For its social and environmental responsibility."*

Jamie Oliver's 15 - *"Will continue to provide works and skills for those ignored by society."*

London Olympics - *"Because they have such a strong platform and a social imperative."*

P&G - *"Working with mothers."*

Twitter - *"Because of its ability to track public sentiment."*

Waitrose - *"Looking at the environment." " Providing products locally."*

We hypothesize that as we move through 2012 and beyond, more people will demand that brands, especially larger corporate ones, behave more sincerely and overtly exhibit principles and ethics they claim in their daily operations, not as only initiatives labeled "corporate social responsibility."



Leadership brands should embody good citizenship

"I think everyone is equally responsible [for improving society]; no one company can do anything alone. Bigger companies have more pull though, so they should be the most encouraging."

"Many companies believe they have a responsibility to 'give back' to society and to me this is wonderful - in the future....[businesses will] have to give to get."

The plea for business to exhibit more caring operations and desire for uniting cause and advocacy initiatives with business and brand strategy is growing stronger. With faith in government very low, Millennials and Baby Boomers in the US and UK tell us that leadership brands should be stepping in and helping to improve society.

"Business is more suited than government to fix things."

Yet, when asked to name companies that are either good or bad corporate citizens (with good corporate citizenship being defined as being responsible with respect to society, people and the environment and bad as acting irresponsibly with respect to the same), many respondents in the US and UK had great difficulty, especially when citing corporations that are acting responsibly. Similar to brand leadership, corporate citizenship appears to be a somewhat ambiguous concept for many.

"Can't think of any, but I assume it would be a company that is, maybe, green."

"This subject can't be pinpointed because you can't get into the real relationships of the companies and how they conduct themselves on the inside. All we see is what the media wants us to view which isn't very much."

For others, most especially in the UK, the term corporate citizenship is an oxymoron.

"Can't think of any! 'Good citizenship' and 'corporatism' are exclusive concepts."

"None at the time being; corporations are too greedy and money hungry to care, and they say they care but they only care about making a profit."

"All companies are bad corporate citizens. They act irresponsibly and don't seem to care about what has been done to our world."

"I feel that on the surface many profess to do good things in the support of all these areas but underneath they are really just interested in filling their own coffers."

While foundations and CSR initiatives are good, a majority of those we spoke to don't notice them. Respondents who did name specific brands as good or bad corporate citizens indicate that corporate responsibility is about fair pricing and ethics as much as it is about using assets to meaningfully impact society and create positive change. The list of brands cited as good corporate citizens is even more fragmented than that of brand leaders, although the top brands named are somewhat similar. Simple things like employing people in my community, being respectful of employees, working closely with mothers and saving resources are noted as behaviors good corporate citizens exhibit matter as much if not more so than innovative research and development efforts around plastics and fuel. Overall, comments show that for a large number of Millennials and Baby Boomers, good corporate citizenship begins with helping me, the individual consumer, and then expands outward.

With respect to companies that are the least responsible when it comes to society, people and the environment, respondents specified fewer companies than they did for those that are good corporate citizens. Many who could not think of specific companies mentioned behaviors classically associated with companies doing "wrong":



*"No particular company comes to mind. I guess any company that employs [people] in third world countries and doesn't pay them fairly."
 "Can't specifically think of one, but anyone who pollutes our environment and poisons us."*

In both countries some respondents named the banking/ financial services (7% in the US and 10% in the UK) and oil and gas (9% in the US and 6% in the UK) industries rather than specific companies within them. Both industries and selected for their *"greed"* and *"lack of respect for other people"* (often designated as the 99%) or the environment.

*"Definitely big oil companies and other multi-billion dollar companies who have a lot more control over things than many people realize."
 "Oil Companies are very bad corporate citizens because they don't care that the products that they produce aren't renewable and they don't care that they are harming the environment."*

A smaller number cited government (3% in the US and 4% in the UK) as irresponsible, using rationale similar to that quoted by those mentioning banks or oil and gas. Associations with greed are clearly bad for brands and anything that gives the impression of it can be harmful to corporate reputation.

*"Companies? My first choice is our own government. Congress has repeatedly dismissed the nation's needs over their own greed."
 "...government makes decisions that falls under each of these categories at various times - it's about the power and not what is best for growing our economy."
 "Government. MPs earn too much money for doing nothing."*

Supporting the theme good corporate citizenship begins with me is the relative absence of News of the World/The Daily Mail as an irresponsible brand, especially in the UK. Only two people named the company and referenced the recent scandal, which was receiving publicity while our study was being fielded.

*"News of the World for its disregard of the law and peoples' privacy."
 "Daily Mail - phone hacking."*

Although we would need to explore this further to empirically deconstruct the dynamics, synthesizing Millennials and Baby Boomers comments throughout our survey with our ongoing conversations, we hypothesize that while illegal and corrupt, News of the World's actions did not hurt the common man, and bad corporate citizenship is strongly associated with harming those who have traditionally not had a voice or jeopardizing sustainability of the average person's livelihood or future.

Responsible Corporate Citizens

Top five brands specified as good corporate citizens

(more than one mention allowed)

US		UK	
Base: 415	634 mentions	Base: 111	108 mentions
Apple	12.8%	Apple	6.3%
Microsoft	7.7%	Tesco	4.9%
Google	5.5%	Google	4.2%
Walmart	3.9%	Asda, The Co-op, Sainsbury, Virgin	3.5%
Ford	3.8%		

The number of brands named as good corporate citizens was even more fragmented than those cited as brand leaders. Not surprisingly, several non-profits and NGOs were included in the list although the majority were named as one-offs and rarely a first-mention. These include: Red Cross, Goodwill, PETA, United Way, St Judes, UNICEF, Human Society, World Wildlife Fund, Planned Parenthood, and The Nature Conservancy in the US, and Red Cross, Fairtrade, NSPCA, UNICEF, World Health



Organization, Greenpeace, RSPCA, PDSA, and Greenpeace in the UK.

Apple, whose leadership halo is clearly very large, was the number one named good corporate citizen in both the US and UK. Interestingly, a majority of the reasons respondents give for choosing Apple are more relevant to advancing society through innovation rather than initiatives typically associated with social responsibility. One or two note that Apple treats its employees well and makes daily life easier with technology.

"Apple. Most reputable and innovative."
"Apple, which helps to create and expand knowledge and understanding of just how small and interconnected our world is."
"Apple because they have the smarts and the money to make whatever product they desire."
"I think Apple is very responsible for the way society is shaping."
"Apple because of their growing customer base and educational institutions they have to be good at educating people and helping the world grow."
"Apple, helps to create and expand knowledge and understanding of just how small and interconnected the world is."
"Apple giving to society by listening."
"Apple. They try to make things for the consumer to ease stress and are green about doing so."
"Apple, takes care of its people and the community."

For some in the US, Microsoft's reputation is tied closely to a brand with a social conscience care of its founder. The majority of people who cite Microsoft as an example of a good corporate citizen do so because they believe the Gates Foundation is contributing positively to society and funded by the company. A small number of other respondents note Microsoft's educational grants and computer donations.

"Gates sets an example with his community & world involvement."
"Bill Gates has made an effort to understand social issues and find solutions."

"Microsoft Corp because Bill Gates donates his money to very worthy causes with an eye to making them self-sustaining."

"Microsoft, Bill Gates is a major donator to good causes."

"Microsoft because of its grants to students to help ensure education."

"Microsoft because they donate computers to third world nations."

In the UK, the majority that named Tesco could not specify why. The one or two who did note more simple day-today oriented actions such as respectful of employees and eliminating waste/saving resources in their stores,

"Tesco, because they donate to charity and are environmentally responsible in their stores."

"Tesco, because they care about its own people."

Cited third most often overall, in both the US and UK, Google balances a wider range of characteristics of a responsible corporate citizen than the other top brands mentioned: advancing society through innovation, respectful of employees and having a social conscience.

"Working to improve man's existence and the environment."

"Google - their products have the chance to change the world."

"Google, they make technology accessible to everyone."

"Google - they seem to want to help add something to the on-line experience and not just make money."

"Google - promotes communication; funds solar projects; cares about people."

"Google - heard people love to work for that company."

"They take care of their employees."

"Google because they make a large effort to 'do no harm' and be socially responsible."

"Google, great moral ethics."

Although Walmart ranks fourth by overall mentions in the US, it is favored more by Millennials than Baby Boomers. Those 16-30 note Walmart 20% more often than Google,



although a large number of respondents did not specify why they chose Walmart. Across both generational cohorts those that did referenced low prices that make life less stressful; employing people locally; and, giving back to the communities in which they operate.

“Walmart because they make their prices low as possible to make life easier.”
“Walmart, they are good though because of their low prices.”
“Walmart, in my town it’s the only big store we have and they do well for the town economy.”
“Walmart continues to give to local community.”

Ford (for R&D, community service and offering a sense of pride in America) and GE (R&D across different facets of the business) were mentioned more often than Walmart by Baby Boomers, although as with other brands named, the reasons noted did not differ by age group.

“Ford and DTE Energy for their involvement in community service and helping the less fortunate.”
“[Ford is] working to reduce their carbon footprint and better others.”
“Ford provides a good sense of who we are as a country.”
“Ford Motor for providing support to Detroit and producing energy efficient, well designed cars.”

“GE because they care about the environment and their employees.”
“GE Wind Energy: alternate energy sources.”
“GE leader in healthcare innovation.”
“GE does the best job of mixing the environment and profit.”

Interestingly, in the UK the brands that tied for fourth most responsible corporate citizens were mostly supermarkets - Asda, The Co-operative, Sainsbury, and Virgin. Although the numbers are directional rather than significant, Sainsbury and Virgin were named by Baby Boomers over Millennials. Other than Virgin for which respondents did not specify a reason, both Millennials and Baby Boomers generally cited environmental initiatives and responsible food sourcing. Like its parent

company Walmart, Asda was also noted in part for its fair pricing.

“Asda continues to promote recycling and environmentally conscious behavior.”
“Asda, good prices for energy.”
“The Co-op seems to be socially and environmentally aware.”
“Sainsbury sourcing its bananas and other fruit responsibly.”
“Sainsbury’s – innovative and responsible.”

Socially irresponsible brands

Top five brands specified as bad corporate citizens

(more than one mention allowed)

US		UK	
Base: 415	634 mentions	Base: 111	108 mentions
BP	21.8%	McDonald’s	11.1%
Walmart	10.4%	BP	7.4%
Exxon-Mobil	6.7%	Shell	5.6%
Bank of America	5.5%	BT	3.7%
McDonald’s	3.2%	BA, Goldman Sachs, KFC**	2.8%

When asked to name companies that are “the least responsible when it comes to society, people and the environment,” Millennials and Baby Boomers tell us they are disillusioned with large organizations. Some do not distinguish public sector organizations from private sector ones. Many of the top five companies named as bad corporate citizens were also noted as good corporate citizens, but by far fewer people. The smaller number of respondents who named them as good citizens tended to be aware of specific initiatives rather than have a more



general sentiment about the company, with the one exception being BP, which was cited by 2% in both the US and UK.

21% of respondents in the US and 44% in the UK could not specify any one company. As were their responses about good citizens, answers from those in the UK were more fragmented than those in the US.

Those who name BP as a good citizen consistently reference its efforts to clean up the oil spill in New Orleans, *"BP is very responsible, as it seems to have contributed a lot of time, money, and effort into cleaning and checking the oil spill that it had created a couple of years ago."* Those who quote BP as an irresponsible corporate citizen most often mention *"the oil spill"* generically with a smaller number noting *"not doing enough to stop pollution."* A smaller number make more enraged statements,

*"B.P. - cutting corners to save money and causing a catastrophe in the gulf."
"BP, still trying to hide just how bad the spill was. Simple greed."*

Those who named BP alongside Shell, Exxon-Mobil or *"other oil companies"* tended to make more enraged or specific comments relating to the environment and natural resources:

*"Oil companies like BP who have no respect for the environment and less for their customers."
"BP gas and Shell. Not helping environment in proportion to the amount of the accident they had or not investing enough on renewable energies."
"Exxon, BP. They act irresponsibly with our natural resources ruining people's health, livelihoods and the environment."*

Cited most often in the UK and fifth in the US, respondents comments about McDonald's are similar in both countries and consistent between Millennials and Baby Boomers as well as by gender. They stem from the unhealthy quality of their food and extend to perceptions of operational practices and profit motive, (especially in the UK).

UK

*"McDonald's - poor food with advertising that suggests that it is healthy. Too much packaging."
"McDonald's with caring only about their profit."
"McDonald's - They are always caught about something bad they do in hiding. Videos of their mass chicken breeding farms. Their staff are near to useless when it comes to ordering."
"McDonald's, encouraging children to eat badly and their waste is strewn all over the place from town centres to the countryside."*

US

*"McDonald's chain restaurants continue to serve unhealthy poor grade food to make profit."
"McDonald's, along with many other fast food places. They are not teaching good health and eating habits, and they are causing much issue to this world, which is obesity."
"McDonald's, they are not fresh, and they don't really care about customers' health."
"McDonald's, they tear down the rain forest and make unhealthy food."*

Cited second most often as irresponsible and fourth most as responsible, more participants in the US named Walmart a bad corporate citizen than a good one. Millennials are significantly more likely to mention Walmart as either a good or bad corporate citizen than Baby Boomers. As it did as a good corporate citizen, Walmart embodies multiple characteristics of an irresponsible brand. Across both generational cohorts, respondents mention greed, disregard for small business, lack of respect for employees, and little regard for the environment.

*"Walmart for every reason you can name."
"Walmart, they don't care about the environment nor employees or society."
"Walmart, I feel they are profit driven rather than caring about the welfare of their employees or the people who create the goods."
"Walmart because they put small local stores out of business because of their extremely low prices and they do not treat their employees in an ethical way."*



"Walmart, they don't treat their employees fair, they have no respect for how their business practices undermine small businesses."

"Walmart takes advantage of their employees and pays them little money and take smaller companies out of their competition."

"Walmart isn't all that bad, but it heavily contributed to outsourcing China which killed jobs for Americans and contributes to pollution in exchange for low prices."

themselves and don't care if they burn everything around them to get it."

Exxon-Mobil and Shell were named third most often in the US and UK, respectively. Those in the UK who noted Shell generally specified activities in Nigeria as the reason they were irresponsible. A smaller number spoke more generically of them as an oil company. On the other hand, those that named Exxon-Mobil offered no distinct reason, referred generically to "oil spill" or placed them alongside BP as an irresponsible oil and gas company. While cited by both Millennials and Baby Boomers, Exxon-Mobil was cited more often by Boomers and was named fourth, not third, by Millennials, after McDonald's.

"Shell - the ongoing crisis in Nigeria."

"Shell - their treatment of the Niger delta and their involvement in the state-sponsored murder of Ken Saro-Wiwa Trafigura - their dumping of toxic waste in the Ivory Coast."

"Shell, they have many oil refineries and cause much pollution."

"Exxon-Mobil due to their poor environmental track record."

"Exxon and other oil companies probably are the worse offenders."

"Exxon for oil spills."

Bank of America was named either for *"bad mortgages,"* *"making executives rich and caring nothing about the public,"* or *"debit card fees"* something that received much publicity in the Autumn or alongside Wall Street as the cause of the recession.

"Bank of America and Wall Street as whole has been negative for the world. They care only about



The sentiment for progress does not necessarily translate to job choice

"The best career path is yourself and your ideas."

Millennials and Baby Boomers focus on collaborating, protesting, inspiring leadership and progress does not necessarily translate into a greater sense of altruism in job choice. When asked if they believed **A Civil Servant/ someone who works in a government job, A Corporate Executive, An Entrepreneur, or Someone who works for a Non-profit/Charity/NGO would be the most attractive or appealing to someone entering the workforce in 2012**, the majority of respondents (36.8% in the US and 39.3% in the UK) cited Entrepreneur.

	ENTREP'R	CORP EXECUTIVE	CIVIL SVC/ GOV'T	NON-PROF/ NGO
Total (Base: 763)	37.5%	25.4%	25.2%	11.9%
US (Base: 562)	36.8%	25.4%	25.6%	12.1%
Millennials	30.1%	29.3%	26.3%	13.6%
Baby Boomers	46.0%	19.6%	24.6%	9.8%
UK (Base: 201)	39.3%	25.4%	23.9%	11.4%
Millennials	43.0%	26.0%	23.0%	8.0%
Baby Boomers	36.4%	24.3%	25.2%	15.1%

Men are significantly more likely than women to say Entrepreneur in the US (42.0% as compared to 33.5%) and somewhat so in the UK (42.0% as compared to 37.0%). Whereas women in the US and UK are more likely than men to say Civil Servant, albeit to different degrees in each country.

Respondents' comments across age groups indicate that the ability to *"exert some control over my life"* is a somewhat greater driver than security of employment. Interestingly those 23-30 in the US strongly prefer the appeal of a career as a Corporate Executive over that of an Entrepreneur (40.3% versus 20.8%).

	ENTREP'R	CORP EXECUTIVE	CIVIL SVC/ GOV'T	NON-PROF/ NGO
Total (Base: 763)	37.5%	25.4%	25.2%	11.9%
US (Base: 562)	36.8%	25.4%	25.6%	12.1%
Male	42.0%	26.0%	21.0%	11.0%
Female	33.5%	25.1%	28.6%	12.8%
UK (Base: 201)	39.3%	25.4%	23.9%	11.4%
Male	42.0%	25.0%	23.0%	10.0%
Female	37.0%	25.0%	25.0%	13.0%

Respondents' replies to the question, **"Would you have chosen the same career path if asked this question 5 years ago?"** strongly indicate that the idea of an Entrepreneur is accompanied by romantic notions. Especially for young men in the US and to some degree in the UK, the idea of relying on oneself to get ahead makes for the most appealing career option.

"I love the challenge of trying to found my own business."

"Yes. I have always believed that the most secure positions are the ones that require you to rely mostly on yourself. Being an entrepreneur provides that security."

"Yes, I would. I think people would desire the freedom to own their own business and create their own things rather than working for others."

"Entrepreneurship is a great way of seeing how capable you are in running your own business and it will test you."

"I would have chosen the same thing because many people aspire to have their own business and create their own path. The climate right now is much more supportive of tech start ups."

"Yes, I feel in good times and bad, owning and controlling your workplace is as important as your home, if not more so."



"Yes, to take advantage of new technologies and consumer trends to work for myself and maximise the rewards earned from what I create and produce."

For others, especially women and to some degree all groups in the UK, with corporate and government jobs no longer being secure, the economic downturn has made the notion more powerful. Perhaps most interesting was how strong a notion this was for even the youngest Millennials, especially in the US where civil service jobs are not as deeply a part of the psyche as they are in the UK.

"No because civil servant jobs were more secure and readily available. Larger need back then but now people need to find niche areas and exploit them themselves."

"No; I would have assumed that a government job would be a long-term position, and a lot of them are being cut or are in jeopardy of being cut. Businesses are failing left and right, leaving CEO's and heads without a job, as well as the rest of their companies. This was not the case a few years ago."

"No because I thought you had to work for an employer back then."

"No, I would have chosen Civil Service back in 2006, but since the Government started scaling back those departments it's not as stable a vocation."

"No. Five years ago I thought that it was still possible to have an employer value an employee, especially one who stayed at their job for a long time."

"No, I would not have. I would have chosen a government job. It was always thought to be a secure position with great benefits, but today they are cutting benefits and jobs."

"In 2006, the civil service looked like a secure job with a guaranteed pension and good working conditions. Now it is run by bullying senior managers, massive workloads due to staff cuts, and broken contractual promises over pensions and redundancy."

Entrepreneurship is also strongly associated with invention. There is also a belief, especially among women of all ages in the US, that entrepreneurs could be the answer to the country's problems.

"Yes, new inventions and new businesses are what help improve the economy."

"Yes, the one thing that keeps our country out of the depression is people starting new businesses. Without these businesses we would be stuck in a catch-22, being monopolized by big business."

"Probably not because if you are smart and have the money, there are many opportunities out there to start off. In 2006, the economy wasn't as accepting of new ideas. Our economy is so unstable today that everyone is looking to find a way to make things better. If I had the money, I'd be putting it to good use."

For some, corporate jobs still represent stability. For many in the UK, a corporate job is now the safe alternative to the shrinking public sector.

"Not really, this career just seems like a steady source of income and not many people like the sound of a job in the government as the government just seems like a mess."

"I probably would have said the same thing; anyone in the corporate workforce is usually better off, providing that it's a strong corporation and projected to do well over time."

"Pretty much. I am following a planned pathway."

"Risks in starting your own company are high. Major companies provide very high pay and good stability with plenty of career advancement opportunities."

"No, civil service would have been my choice, no longer due to government spending cuts."

For others, especially younger participants, an executive track in a corporate job still holds an appeal because of the potential financial perks. This was as prevalent a perception in the UK as it was in the US.

"High ranked positions are always popular in the workforce. You get a chance to show what you know as well as earn a high wage pay check."

"Yes, because corporates have always had an excellent reputation and power in society."

"I think I would have said yes. I believe that you should strive to better oneself and earn a high wage. I



think the majority of people want to do well for themselves."

"Yes, I think the benefits of being a corporation exec have not changed despite the changing economy."

"Yes, most people chase the maximum salary, perquisites and bonuses in the 21st Century as they think this is the ultimate measure of success."

In the US, even with the cutbacks, government jobs hold more appeal than before, especially to the youngest Millennials. Several who chose a government job over the other choices referenced military service as attractive. In the UK, sentiment is somewhat more mixed, but not as negative towards the benefits of public sector employment as we would have expected given the large number of cutbacks.

"No, due to the recession and economy I believe these paths provide a sense of stability, which may not actually be true. In 2006, I believe an entrepreneur would have been more attractive."

"No, government jobs have better benefits which are very appealing in this economy."

"If I had known how bad the economy was going to turn out, I think I would have chosen this field. The pay and benefits are good and the experience you gain will help you find other career opportunities should the need arise."

"Five years ago, there were many more jobs available. Here in Maine, the outsourcing of jobs overseas, have destroyed the job force. The only jobs booming is in the public service sector."

"No. Working for the government has become even more lucrative in the way of salary, job security, health and retirement benefits at the expense of the average hard working person."

"No, after the problems with bankers bonuses and the amount of cutbacks non-government ran companies are taking, it seems the government is the only stable thing going in the UK."

"Yes, the civil service had many jobs available in 2006 and at the time was a stable career for university graduates who found it hard to use the degrees they had achieved in other job roles."

"In 2006, the stability and low wages of a Government job would have been less appealing than

in the current economic climate where any job is attractive."

"No, because then private sector opportunities would probably have been favoured [over civil service]."

"Yes, I would have made the choice five years ago as, while there is no longer a 'job for life' option (apart from the Royal family) the nearest to a stable occupation will always be the Civil Service."

Those who chose non-profit jobs as the most appealing did so as much because of the social benefits non-profits provide as because of limited job prospects elsewhere. Given the desire for social progression that was expressed throughout our conversations and in the balance of our Internet survey, we had anticipated a higher percentage of people choosing the charitable/NGO sector. Responses to this question clearly reinforce the sentiment we learned from peoples' responses when discussing good and bad corporate citizenship - that I shall not compromise myself for the collective. That someone else and/or businesses should make sacrifices before I do. Considering that many join movements from the sofa by clicking a like button, this should not have been so surprising.

"Probably not, because most people would not think of working for a nonprofit as being profitable. I think today it is a better career choice, because there are always people in need and there is stability in that."

"Probably not, since I was then more motivated by personal wealth and attainment rather than global issues."

"Yes, I would have chosen this same career 5 years ago. Working for a nonprofit gives one the opportunity to serve and make a positive difference in their community."

"Jobs in NGOs are more interesting and challenging now."

"5 years ago most people could get jobs, even at a young age; now young people 16-18 can't get jobs, or struggle to find them. Working for charities or non-profits would help on your CV, even if you couldn't get a job; also it's experience which a lot of employers want."

"No. I think they would have looked to go to one of the large financial institutions."



With infinite time we'd better ourselves and society

We asked people what they would choose if they had an infinite amount of time to pursue any one activity. Responses were consistent across cohorts in both countries. Respondents' choices of activities are reflective of themes presented earlier - respect for others and self-betterment. Philanthropy/volunteering/charity is the number one choice amongst women of all ages in the US and UK and Baby Boomer men in the US. Younger Millennial males in the US (16-22) cited a variety of sports - somewhat frequently in conjunction with pursuing a career in a particular sport - followed by philanthropic activities, whereas their British peers name education/skills development and sports - non-career oriented - nearly equally. Older Millennial males (23-30) in the US mention education/skills development and travel and British men of the same age note scientific/technological pursuits significantly more so than other interests. British men 46-55 focus mostly on travel and those 56-64 sports.

Contrary to some popular stereotypes, only a handful of Millennials in the US and UK would choose to spend time on social networking and gaming.

Top choices of activities if given infinite time

US	UK
Philanthropy/volunteering/charity work	Philanthropy/volunteering/charity work
Further education/work skills development	Further education/work skills development
Travel	Sport/intense physical activity
Humanities/artistic endeavors	Travel
Sport/intense physical activity	Scientific/technological pursuits

Philanthropy/volunteering/charity work

"Doing good for charity leaves a good feeling that just lasts and carries on, days wouldn't be boring either but filled with something that will contribute to society."

Philanthropic endeavors, volunteering and charity work were the number one cited activities if given infinite time in the US and UK although to varying degrees. In the US more than one-quarter of respondents mentioned activities in this area, more than double the number that noted education and skills development. Whereas, in the UK, philanthropy was cited only very marginally more than education and skills development, by fewer than one-fifth of participants.

In both countries and across ages, the focus on giving is both local and global although to varying degrees. Those in the US were equally split between naming local and global initiatives, whereas those in the UK were more likely to mention something globally oriented.

Helping others locally and regionally

"Make sure the elderly are looked after."

"Charity work because I like to give back to the community."

"I would do work for the homeless in cold weather states because I know the shelters are full and many people need something to keep them warm at night."

"Work in a soup kitchen to help the less fortunate."

"Build houses for young people to rent."

"A charity event such as helping the starving."

Helping to progress the global community

"Raising money for not for profits because there's so much good that can be done."

"I would love to become an actress and use it as a voice for the less fortunate people and participate in every charity I had time for."

"I would want to help everyone I can and listen to their stories. Things come and go but people are unique and the brain is a vast journey."

"I would love to help fellow mankind, I always feel like my heart gets ripped out when I see the homeless or a child suffering."



*"Spend time promoting world peace."
"I'd like to spend time with people from poor areas of the world in a practical way."
"I'd like to help over in Africa or another 3rd world country."*

A number of Millennials and Boomers focused on helping children in need. Again, American respondents spoke of working with children both locally and globally, whereas those in Britain focused more on the developing world. Only a small number cited children as the future when explaining why they chose the activity they did.

Working with children locally and globally

*"It's unacceptable that one-third of the homeless population in the US are children. Children who are hungry."
"Foster children to give them a stable environment."
"I want to help kids in 3rd world countries."*

Children as the future

*"I would help children because they are our future so they need the proper training in order to help the world."
"Educating children, because it's the most important job to ensure future scientists and chemists and electricians."*

Not surprisingly, a number of respondents in both countries, especially Millennials, speak about the feel good factor and personal rewards that accompany charity work when explaining their choice.

*"Volunteering because it makes me happy and I feel great giving back to the community."
"To help as many people as I can financially or by service because I get pleasure out of doing things like this and they benefit others as well."
"If I had an infinite amount of time I'd help the less fortunate because it would make me better human being because I will be helping someone."*

Some respondents, especially Baby Boomers, focus on the aspects of giving that will enable them to progress society and perhaps leave a legacy, as well as aid others. They cite activities that integrate personal and

professional expertise and knowledge with social missions, such as helping younger people become more self-reliant, reeducating them and reengaging the next generation.

*"I'd study the traits of successful people and educate younger people about how to become successful in life."
"I'd run a business and teach people how to successfully run theirs because society needs people who are self reliant."
"I'd develop a not for profit company to work with disengaged young people in the community looking at ways to re-engage them."
"Charity work to empower those without the basics get a solid footing in life."
"Change my career path and help the poor in third world countries."
"I would provide reading and math tutoring to socio-economic challenged students. All children need an education."
"I would teach the children of the world Ballroom DanceSport to bring peace and art to the world and learn partnership and co-operation."
"Teach senior citizens and low income people to use computers and the internet to locate info they need and to stay in touch with their friends."*

Although the majority of respondents in both countries focused on helping other people, a much smaller number mentioned working on behalf of animals and only two participants noted the environment.

Working on behalf of animals

*"Taking care of animals because I just love them."
"Write fund raising grants for a local dog rescue and do more for them than I currently do."
"RSPCA simply because I love animals and would donate my time in which to help them, I believe animal rights should be as strong as human rights."*

Improving the environment

"Helping the world about things such as global warming and feuds between countries."



Education and work skills development

A large number of Millennials would spend infinite time furthering their education or developing skills. The majority who cite activities in this category focus on bettering themselves ultimately for tangible personal benefit, correlating higher education and skill development with higher pay and access to greater job or business opportunities. A smaller number speak about a need to feed their brain.

Career advancement

"Education, because it's something that will benefit me [in my job]."

"I'd return to university and chose a professional degree to improve my job prospects and income."

"Learning 2 or 3 languages would widen my customer base."

"Education because I need it to become a lawyer and have a well supported background."

"Returning to school is a good way of bettering myself for my family's sake."

Improving the mind

"I love learning new things; no matter how hard or boring they may be, I always find something in there that interests me."

"There's so much I'd still like to study and learn professionally and personally, but now I have the time and money to devote to it."

For a small number, developing new skills embodies an element of helping others.

"I would be a teacher, I'd love to help kids get smarter."

"Researching literature and teaching so I can show people the power of words, their limitless potential."

"Continue to go to school so I can help children with disabilities."

Education is viewed as a life-long process rather than a means to an end and an activity reserved for a particular life-stage. Respondents believe continuous education enables people to live a consistently more relevant life.

"Education, it's a lifelong thing."

"The world is moving so fast, it's hard to keep up, so I'd spend infinite time educating myself about technology, computers and what's going on."

"I would continuously further my education, you can't rely on what you learnt at 16 now."

Travel

The majority of people who name travel see it as an opportunity for self development.

"Travel, because it would show me how people live and make me well-rounded."

A little more than one in ten participants cited travel as the way they'd choose to spend their free time. Given our learning from research we've done in the travel industry, we had anticipated the number of participants who would choose this activity would be higher. University-aged, female Millennials (19-22) in the US, older Millennials (23-30 year olds) in the UK, and male Baby Boomers (US and UK) were the most likely to name travel.

Regardless of age or gender, those who chose travel shared an openness and desire to connect with people who live different lives. Travel offers the opportunity to understand and engage in new cultures and, for a number of respondents, it further is a way to supplement formal education.

"Travelling – I'd like to see the world before I die."

"I would pursue travel, it's good to learn about different people and experience new things."

"Live in and experience new and diverse cultures."

"Viewing the world because there are so many wonders I really want to see."

"I'd love to travel to go to new places and learn about them, to take in the culture and explore."



*"I'd travel and see amazing things and meet new people: travel is educational and rewarding."
"Travel to meet new people and learn about other cultures, see amazing things and experience nature."
"I want to travel the US, it's a beautiful country and I've seen almost nothing of it. It's sad and I want to see what this nation is really built on – the people in it."*

For others, most especially in the US, travel is a means to break from the challenges of day-to-day life and experience peace and contentment.

*"Travel the world, because I want to see everything while I'm alive and it would make me happy and peaceful."
"I would travel the world to clear my head."
"I would travel most of the time because all the people who are important to me are spread around the world."*

For a small number, travel is closely linked with charity work.

*"Walk across the entire planet to raise money for charity."
"To go to a foreign country and help the children."
"I would travel the world and do charity work in Africa."*

Sport and intense physical activity

The majority of participants who named sport and intense physical activity were male, with the exception being a number of 19-22 British women. A number of younger American Millennials (16-22) who named specific sports did so in conjunction with career or earning money, whereas their British peers did not relate pursuing a sport to a career. A significant percentage of British men 56-64 mention sport as well.

US + UK 16-22 year old males

*"Become an amazing golfer and make money doing it."
"Be a professional baseball player."*

*"Football, I wish I could play football forever."
"Basketball because it is exercise and fun."
"Hockey."
"Skateboarding."
"Skiing – love it, my life."*

UK 19-22 year old females

*"Snow boarding because I've never done it before and I'd love to have a go at it."
"Football - coaching, its fun, interesting & I hold a passion for it."
"Swimming."*

UK 56-64 year old males

*"Marathons."
"Racing – it makes me feel young again and gives you this amazing buzz."
"Golf."
"Rugby."*

Scientific/technological pursuits

Younger Millennial women in the UK and men of all ages in the UK and US would pursue a range of scientific and technological endeavors given infinite time. (Please note scientific and technological pursuits were named sixth most often in the US.) Interest in science and technology from studying anti-gravity, examining voltaic cells, finding a cure for cancer, or training as medical doctor to researching computer methods to finding more effective solutions to global warming.

For some, science brings the sheer joy and satisfaction that only comes from mastering something difficult.

*"Science, to me it's as fun as leisure."
"I love Science!"
"Computer science classes – computers fascinate me."
"Researching computation methods because it's fun."
"It would be scientific because having a scientific idea behind something that's understood and makes sense to the masses is amazing."*



For other respondents, the pursuit of science is linked to a desire for progress, and a smaller number see it as a way to improve their country and the economy.

*"Study medicine and become a doctor."
"Scientific understanding, how does the world work and what could make it better."
"I would learn about science to help improve our world."
"I would learn more about science. Ways to help improve our life."
"Get man into space permanently."
"Research on innovative designs for aircraft."
"Cure global warming, people are aware of the damage but no-one seems to care enough to do something MAJOR."
"Science, I'd find a cure for cancer."
"I would focus my time on invention of new technology so jobs would be created here instead of somewhere overseas."*

Humanities and creative pursuits

Women and 19-22 year old men in the US and UK would use infinite time to learn new languages, play music, dance, draw, read and write. (Please note humanities and creative pursuits were named sixth most often in the UK.) Once again, personal betterment is a strong driver for many.

*"Speaking a different language makes you a better person."
"Drawing, I love art so much and there just isn't enough time in the day, I'd use infinite time to improve my skill."*

A number of respondents speak of humanities and creative pursuits as passions that add a sense of delight or contentment to their lives.

*"Writing – anything from fiction to life stories, I love putting words onto paper."
"Anything music – vocal, song writing and guitar."
"Read novels, there's never enough time to read all the literary fiction."*

"I've also loved writing but I don't have the time to do it now."

"I would pursue becoming a better musician because it is one of my favorite hobbies."

"Reading, I love to read it makes me feel I'm getting away from the reality."

"Music, it brings comfort to myself and others."

For others, artistic endeavors are a lifelong dream.

"Music, its something I enjoy and would wish to improve in."

"Writing books, it's a lifelong dream."

"I would finish writing a book I started about 40 years ago."

"Directing theatre it's always been my vocation."

"Drawing; because its been my passion since I was small."



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