YOUTHSCAPE
INTRODUCTION

This report presents the findings of a survey carried out on behalf of the Institute of Advertising Practitioners in Ireland by Behaviour & Attitudes.

The overall objective of the research was to provide a quantitative analysis of the behaviour patterns and belief systems of Irish teenagers today.

The questionnaire for the survey was developed on the basis of detailed discussions with IAPI representatives and covered a wide range of topics:-

- Young people's activity patterns
- Their musical preferences
- Their general beliefs and the factors that tend to form their belief systems
- Family life
- Religious beliefs
- Education
- Work and ambitions
- Money and spending
- Travel
- Eating, diet and health
- The Media
- Advertising

A copy of the questionnaire used for the survey is included as Appendix A to this report.

SAMPLE STRUCTURE

The sample for the survey was designed to provide a representative picture of views and attitudes among people aged between 12-18 in the Republic of Ireland. The total sample for the survey covered 1,200 respondents, interviewed on a face-to-face.

The sample was quota controlled to be representative of the total population under review in terms of sex, age, social class, region and area of residence.

All interviewing of the survey was carried out between May 7th – 21st, 1999 by trained members of the Behaviour & Attitudes fieldforce, working under supervision. Our normal quality control checks were applied.

NOTE ON REPORT FORMAT

Following on from this introduction we present a brief resume of the key findings from the study. This is then followed by a more detailed commentary on the key findings from the study, supported by relevant charts and summary tables. The report is then completed by a full set of tabular results a set of technical appendices.

SUMMARY & CONCLUSIONS

It is extremely difficult to summarise the findings of a broad ranging survey of this kind. The most we can do is highlight some of the key issues which are discussed in greater detail in the remainder of the report.

- The Mall-Rat syndrome has clearly arrived in Ireland. Hanging around Shopping Malls is one of the most popular activities for teenagers.

- Computer and video games are perhaps the most popular activity overall.

- Running against the stereotype, there is perhaps a higher level of interest in magazines and books than pessimists might anticipate. Sports also continue to be highly important to young people, although there is clear evidence of a fall-off as young people reach the latter stages of their teens when there is a growing interest in nightclubs, discos etc.

- By the time they reach the age of 17 there is a better than 6 in 10 chance that an Irish teenager will have been offered illegal drugs. By their own admission, about 1 in 7 of those teenagers who are offered drugs will take up the offer. If anything, this is likely to be an understatement, given the sensitivity of the subject matter.

- Irish teenagers have a much wider repertoire of musical preferences than they are something given credit for. Having said that, the most popular performers are reasonably predictable: Robbie Williams and Oasis.

- Despite what many parents might fear, Irish teenagers retain a strong belief in traditional family values. Not surprisingly, they have a strong admiration for sporting and musical superstars but they retain an admiration for people who are closer to them: their parents specifically.

- The family continues to operate as a traditional melting pot. About 4 in 10 teenagers claim to hold the same sorts of views as their parents, while about 50% believe they have a quite different set of views. (The balance aren't sure).

- About 8 in 10 teenagers believe that their parents understand them at least fairly well. Rather fewer would say that their parents understand them very well. Mothers get consistently higher marks in this regard than do fathers. (This is true for teenagers of both sexes).

- There are two traditional values which rate lower in teenager estimation than one suspects might have been the case in the past: the virtues of obedience and religious faith.

- About half of all teenagers would describe themselves as religious but this declines quite substantially with age.

- About 6 in 10 attend church services on a weekly basis. Here again there is evidence of a rapid decline in attendance with age.

- The majority of teenagers believe in God, heaven, sin and the soul. Only minorities believe in resurrection, the Devil or hell.

- In ideal circumstances, about 1 in 3 Irish teenagers say they would prefer to live somewhere other than in Ireland.

- There are marked differences in the aspirations of teenagers, depending on gender. Males have a very clear focus on owing their own homes, running their own businesses or becoming personally wealthy. They also have a significantly above average interest in representing their country at sport although this declines quite rapidly after the age of 16.

- Females have an even higher level of interest in owning their homes. However, despite the major changes in the workforce in recent years, they have rather lesser aspirations towards owning their own business and put rather more of an emphasis on having children as a personal aspiration.

- Teenagers see education as have most important element in helping a person achieve his or her ambitions. As they get older, they increasingly put a value on determination and ability to get on with others as important assets in this regard: putting these ahead of intelligence, creativity and so on.

- A quarter of all teenagers have some income from work: mostly part-time. By the time they are 17, more than half of all teenage males have some income from work.

- It may be that this is driven by a perceived need for quite substantial levels of disposable income. The typical Irish teenager today has a weekly disposable income of just under £20 per week. Among 17-18 year old males this rises to an average of almost £46 per week.

- The typical teenager spends approximately £460 per annum on clothing and footwear. Among 17-18 year old males (the heaviest spenders) this rises to in excess of £650 per annum.

- Not surprisingly, teenagers have very definite *brand* preferences (too detailed to attempt to summarise here but covered in detail in the main body of the report).

- Despite a heavy focus on fast-food, there is evidence of considerable diversity in the eating, diet and health regimes of teenagers.

- Almost 8 in 10 teenagers have travelled overseas at some stage. More than half has been further afield than Britain.

- More teenagers from the Republic have visited Spain than have visited Northern Ireland.

- 1 in 4 teenagers reads a daily newspaper every day. Among males aged 17 or 18 this rises to 41%.

- More than 40% of teenagers read a Sunday newspaper every week. This rises to more than 60% among those aged 17 and over.

- More than 80% of teenagers watch television every day of the week: typically for an average of almost three hours per day.

- Their station viewing patterns are significantly different from those of their parents, as are the programmes they prefer to watch themselves.

- 2 out of 3 teenagers listen to the radio every day: typically for almost 2 hours per day.

- 2FM and FM104 are the most popular radio station choices.

- About 1 in 5 listen regularly to night-time phone in radio.

- Teenagers have slightly more favourable attitudes towards advertising than do their older counterparts.

SECTION ONE
ACTIVITIES AND PASTIMES

1.1 A mixed bag of activities

In the opening section of the survey respondents were ask how often they participated in certain activities or pastimes nowadays. This is inevitably a somewhat crude measure of how young people spend their spare time. It may be that certain activities require significantly more time input, per session (so to speak). Even allowing for this however, it does seem that the two most popular activities with young people nowadays are rather sedentary: playing computer and video games or hanging around shops and shopping malls. The activities engaged in most frequently are set out, in rank order in the following chart

ACTIVITIES ANALYSIS (1)
(Frequency per annum)

	TIMES Per Annum	MALES 12-13	MALES 14-16	MALES 17+	FEMALES 12-13	FEMALES 14-16	FEMALES 17+
		INDEX : AVERAGE = 100					
PLAY COMPUTER OR VIDEO GAMES	34.7	129	121	93	97	88	62
WALK AROUND SHOPS/SHOPPING MALLS	33.7	78	85	88	105	122	117
PLAY ANY TEAM SPORTS (FOOTBALL, BASKETBALL ETC)	33.2	129	121	86	114	85	57
TAKE PART IN ANY FORM OF EXERCISE/KEEP FIT ROUTINES	29.7	105	112	89	96	97	94
READ MAGAZINES	29.3	82	82	85	106	122	121
RENT VIDEOS	26.4	97	105	111	88	99	99
USE A PERSONAL COMPUTER	26.2	98	103	106	97	100	95
READ BOOKS	23.4	93	78	89	135	102	117
PLAY ANY INDIVIDUAL SPORTS (TENNIS ATHLETICS)	20.8	123	108	74	119	96	73

The figures in the total column on the left-hand side of the chart show the average number of occasions per annum that people engage in each of the activities. The body of the table then shows an index score for males and females at different age groups.

These are the top nine activities and it can be seen they are a mixture of sedentary and more active pastimes. Team sports and keep-fit routines rank in third and fourth place after the more sedentary pastimes nominated earlier. Interestingly, despite the stereotype, young people read magazines more often than they rent videos. In addition, the frequency of reading books is only marginally lower than using a personal computer. Individual sports (like tennis and athletics) rank in ninth place overall.

There are significant differences between males and females in their prime interests.

Males tend to be significantly keener on playing video games and on sports, particularly on team sports.

Females tend to be more enthusiastic readers of both books and magazines although magazines tend to take over from books as females move into their later teens. Females in their late teens tend to be particularly keen on hanging around shopping malls.

One very interesting point in this analysis is the extent to which interest in team sports and individual sports seems to drop off very sharply for both males and females as they move into their mid-teens. The level of participation in team sports among 17 year olds males is only about two-thirds of that of their 12-13 year old counterparts. The fall off in participation in team sports among females is even more sharp.

Perhaps a large part of the reason for this fall of in sporting interests is contained in the following chart

ACTIVITIES ANALYSIS (2)
(Frequency per annum)

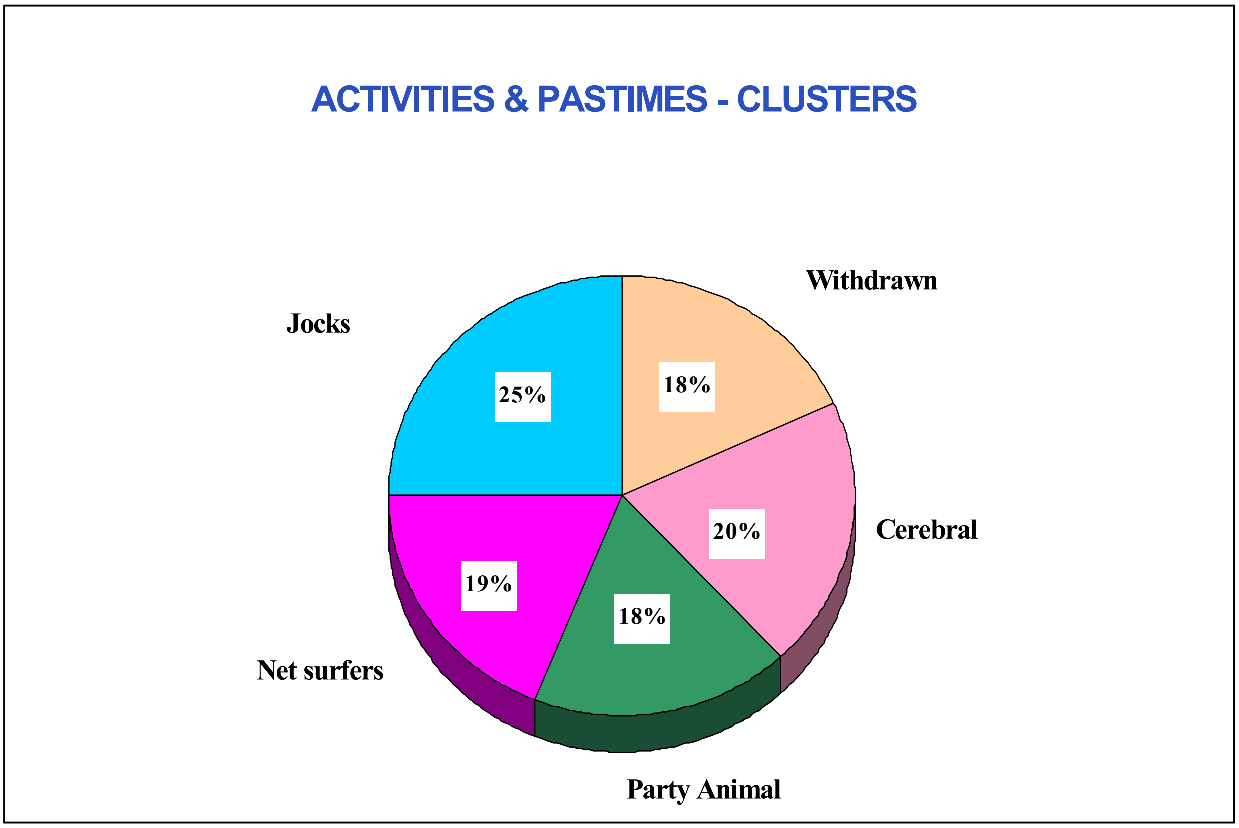
	TIMES Per Annum	MALES 12-13	MALES 14-16	MALES 17+	FEMALES 12-13	FEMALES 14-16	FEMALES 17+
		INDEX : AVERAGE = 100					
GO TO A LOCAL CLUB/DISCO	16.5	60	83	170	48	96	168
GO TO THE PICTURES/CINEMA	14.9	90	101	85	96	109	112
GO TO PARTIES	10.2	54	85	137	61	115	157
GO TO A NIGHTCLUB	10.1	29	54	237	25	76	248
BUY RECORDS, TAPES OR CD'S	9.8	65	94	121	89	112	120
USE THE INTERNET	9.8	103	97	129	81	82	126
GO TO THE HAIRDRESSERS	8.5	109	119	110	71	84	107
GO TO A GIG/CONCERT	2.6	81	95	139	53	112	119
PLACE A BET OF ANY KIND	1.9	102	149	201	28	50	78
GO TO THE THEATRE	1.4	140	80	122	75	97	102

In all of these areas one sees a dramatic rise in the incidence of participation as young people move from their early to their late teens. This is true in relation to clubs and discos, parties, nightclubs, gigs and concerts, betting activity and so on. Interestingly the pattern of going to the cinema changes less radically over the years under review.

One other interesting point in this analysis is that teenage males tend to go to the hairdresser more than teenage females. (Particularly in the earlier teen years).

1.2 Activities Segmentation

It is possible from the data just reviewed to segment young people into five approximately equally sized groups. These can be summarised as follows:-



Each of the five segments can be distinguished on the majority of the activities and pastimes considered

ACTIVITY/PASTIME CLUSTERS (1)
(Behaviour Differences)

	TOTAL OCCASIONS Per annum	CLUSTERS				
		WITHDRAWN	CEREBRAL	PARTY ANIMAL	NET SURFER	JOCKS
		(INDEX: AVERAGE = 100)				
PLAY COMPUTER OR VIDEO GAMES	34.72	93	100	86	112	106
WALK AROUND SHOPS/SHOPPING MALLS	33.68	80	108	114	105	94
PLAY ANY TEAM SPORTS (FOOTBALL, BASKETBALL ETC)	33.23	95	89	83	104	121
TAKE PART IN ANY OTHER FORM OF EXERCISE/KEEP FIT ROUTINES	29.68	103	22	98	112	151
READ MAGAZINES	29.32	68	99	105	118	106
RENT VIDEOS	26.35	86	96	119	110	92
USE A PERSONAL COMPUTER	26.24	88	94	55	181	83
READ BOOKS	23.35	25	123	84	124	130
PLAY ANY INDIVIDUAL SPORTS (TENNIS ATHLETICS)	20.80	71	15	86	114	187

Low = **High**

For example, it can be seen from the above analysis that Jocks are particularly more attracted to sporting activities of every kind (hence the name they have been designated). Perhaps surprisingly however they are also quite keen readers of books.

Net Surfers have almost twice the average propensity to use personal computers. They are also drawn, to an above average degree, to books and magazines.

The remaining three groups tend to have below average levels of participation in the activities highlighted in this particular chart. This is particularly true of the group described as Cerebral. They have a high interest in books but have almost no interest in individual sports or keep-fit routines.

ACTIVITY/PASTIME CLUSTERS (2)
(Behaviour Differences)

	TOTAL OCCASIONS Per Annum	CLUSTERS				
		WITHDRAWN	CEREBRAL	PARTY ANIMAL	NET SURFER	JOCKS
		(Index: Average = 100)				
GO TO A LOCAL CLUB/DISCO	16.51	77	67	221	114	46
GO TO THE PICTURES/CINEMA	14.94	25	128	113	111	115
GO TO PARTIES	10.24	65	56	239	122	45
GO TO A NIGHTCLUB	10.08	50	31	322	112	26
BUY RECORDS, TAPES OR CD'S	9.79	73	112	121	124	77
USE THE INTERNET	9.75	37	23	48	388	21
GO TO THE HAIRDRESSERS	8.53	93	91	125	111	87
GO TO A GIG/CONCERT	2.56	78	68	162	128	76
PLACE A BET OF ANY KIND	1.92	68	48	172	150	77
GO TO THE THEATRE	1.41	41	52	99	208	98

= **High**

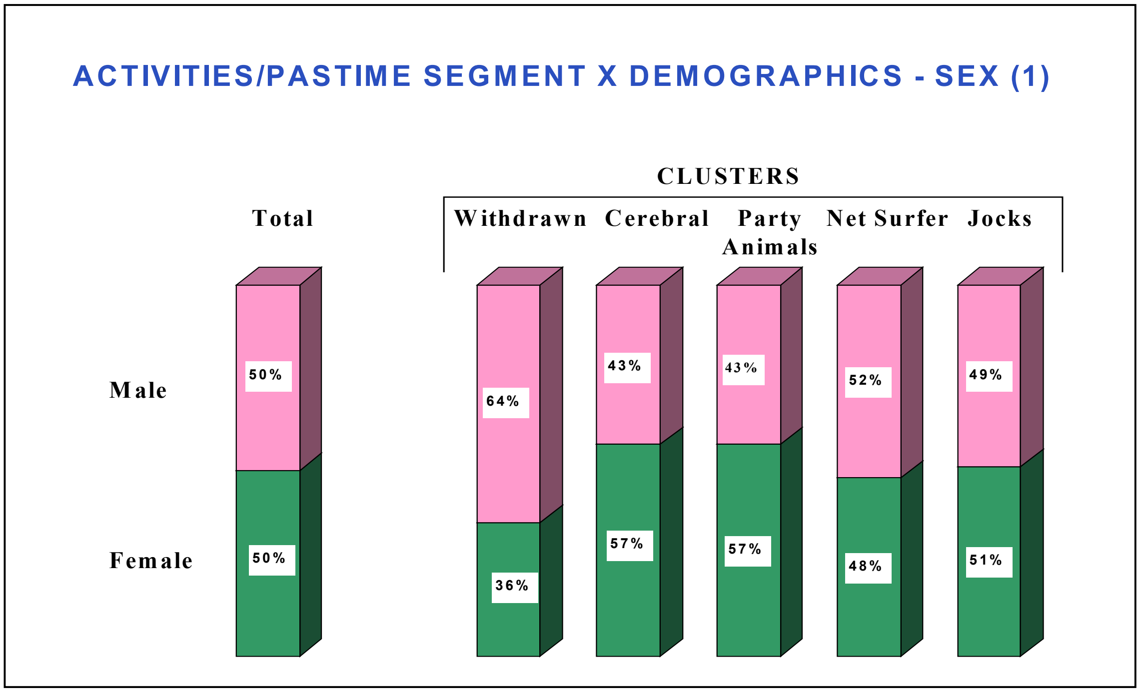
The Cerebral group also have a higher than average interest in the cinema, records and CD's.

One can see clearly the basis of the Party Animal designation in the chart above. This group has three times the average level of visiting nightclubs and are more than twice the norm for visiting discos or going to parties. They are also significantly above average in placing bets, going to gigs and visiting the hairdresser.

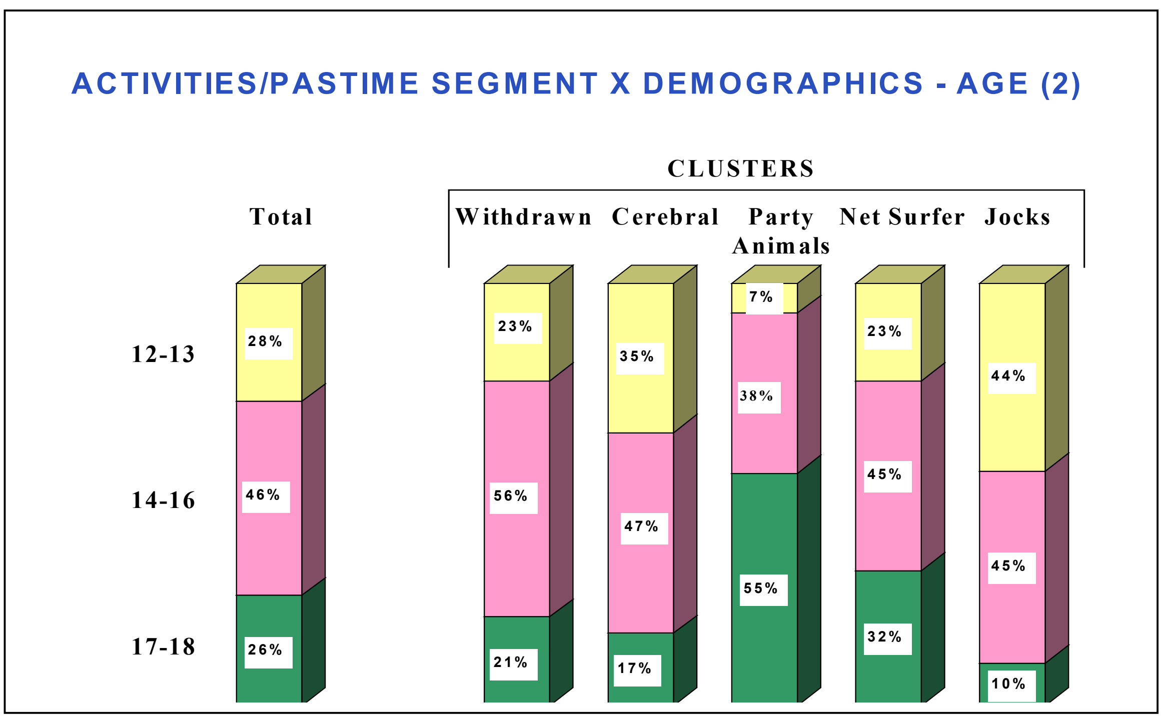
It can be seen from this analysis also than the Net Surfers are almost four times the norm in their incidence of using the Internet. We saw earlier that they have an above average interest in reading. That is even more marked in the case of going to the theatre. They are also keener than average on music, gigs, and more surprisingly betting activities.

The group designated as withdrawn are low on all of these activities.

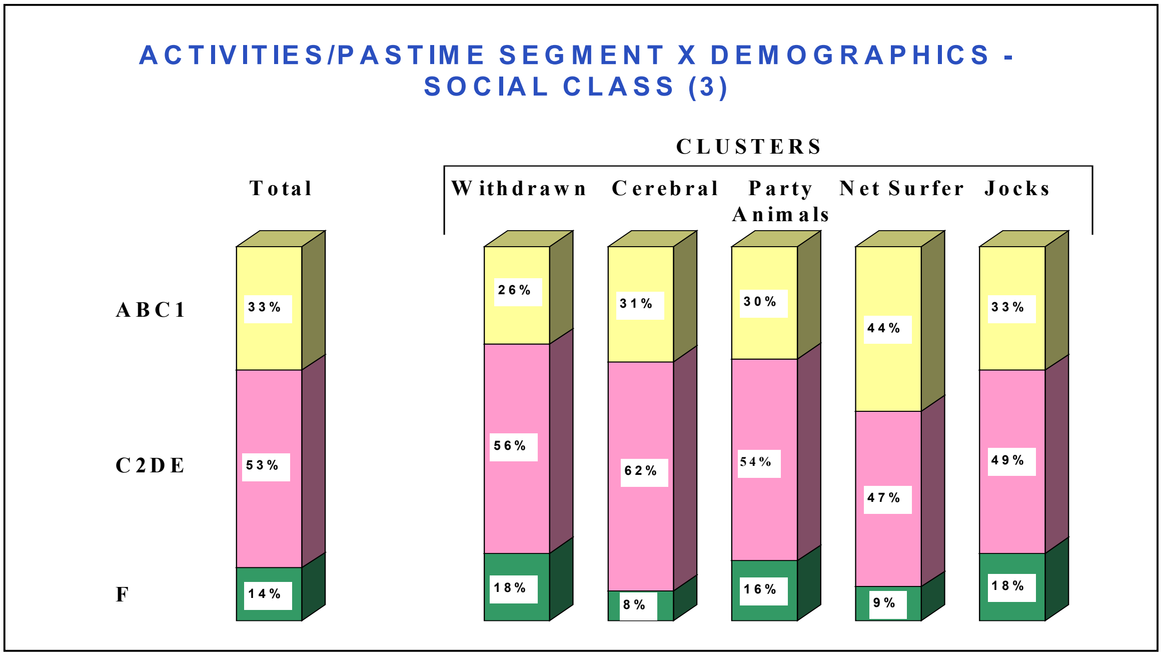
There is relatively little variation between these groups on the basis of sex, except that the withdrawn group are more likely to be male. There are some more interesting differences in terms of age group however as is evident here:



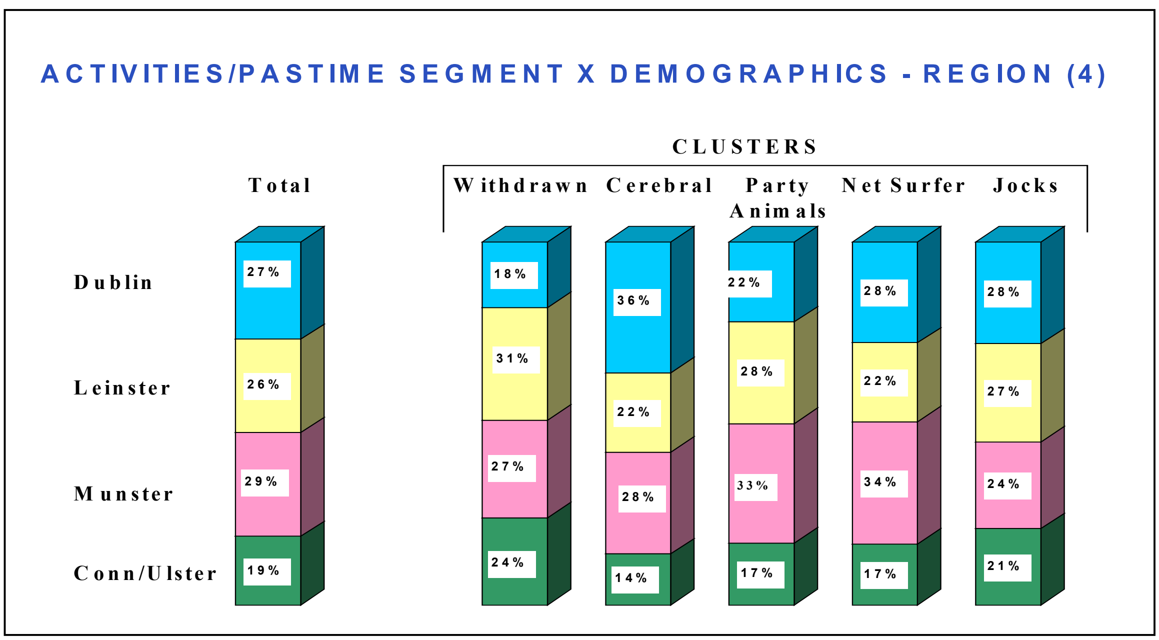
Jocks and the Cerebral group tend to be younger on average, Party Animals tend to be older (not surprisingly).



There is little difference between the segments in their social class composition except that Net Surfers contain a higher proportion of people from middle class backgrounds.

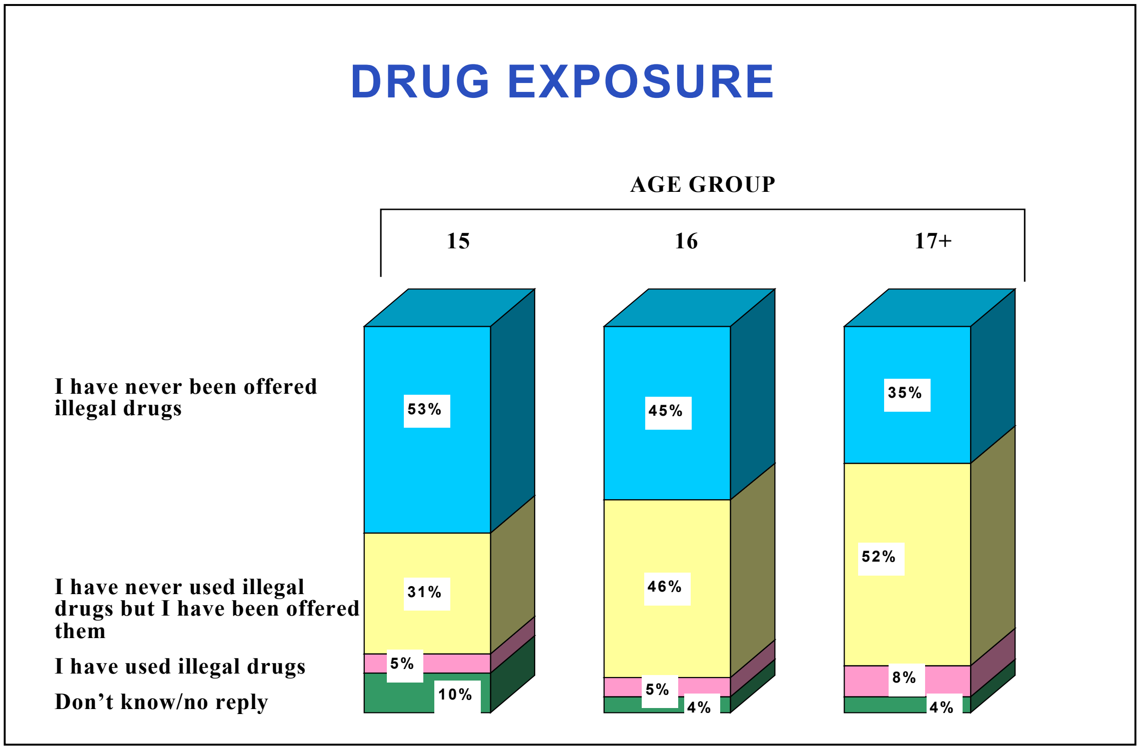


The five segments are reasonably evenly distributed across the country except that those in the Cerebral category have a higher concentration in Dublin while those from the withdrawn category have a higher than average concentration in rural locations in Leinster and the West of Ireland particularly.



1.3 Drug Exposure

One of the perennial worries of parents is the extent to which their teenage children are exposed to the issue of drugs. We took the opportunity in the current survey to question respondents aged 15 and upwards on this issue with the following results:



This is obviously a sensitive area of questioning and one would expect some understated, particularly in regard to actual experimentation with drugs. In this sense, one is probably best advised to see the measures here as a minimum of measure on the scale of the problem.

The indicators suggest by the time they are fifteen something in the region of 4 in 10 teenagers will have been offered drugs of some kind and at least 1 in 7 of those who are propositioned will succumb.

By the time they are seventeen more than 6 in 10 will have been offered drugs and at least 1 in 7 will have accepted the offer.

SECTION TWO
MUSICAL PREFERENCES

It is a well establish truism that music, and particularly pop music in its various manifestations, is a central focus of interest for young people.

In the pilot work which preceded the current study we uncovered 30 different musical classifications which, it was felt, would have some interest for young people.

The study has confirmed a clear rank order for these 30 musical types. The top 10 are listed in rank order below

MUSICAL PREFERENCES (1)
(Base: All Respondents)

	SCORE* (OUT OF 5)	MALES			FEMALES		
		12-13	14-16	17+	12-13	14-16	17+
		INDEX : AVERAGE = 100					
POP	4.04	103	92	92	111	104	99
DANCE MUSIC	3.85	96	96	100	99	105	103
ROCK	3.26	101	104	105	95	96	97
SOUNDTRACKS	3.12	102	98	95	94	105	103
RAP	3.03	102	99	98	101	102	96
RAVE	2.99	107	100	96	92	106	94
HIP HOP	2.88	99	96	90	106	105	104
EASY LISTENING	2.75	95	96	97	98	103	111
SEVENTIES MUSIC	2.71	93	93	103	92	107	114
SIXTIES MUSIC	2.71	90	94	102	94	106	116

* **Score: Out of a maximum of 5**

It can be seen that pop, dance and rock music are the three most popular classifications. The rank order of the remainder is evident from the chart. It may come as something of a surprise to see easy listening, 70's and 60's music ranking in the top 10 (albeit in the last three places).

What is much more interesting in the chart is the lack of variation in tastes and preferences between the two sexes and the different age groupings within these.

That pattern continues if we consider the next 10 most popular musical types

MUSICAL PREFERENCES (2)

(Base: All Respondents)

	SCORE (OUT OF 5)	MALES			FEMALES		
		12-13	14-16	17+	12-13	14-16	17+
		INDEX : AVERAGE = 100					
SOUL	2.58	92	97	97	94	108	109
ELECTRONIC	2.54	110	102	101	91	101	92
DRUM & BASS	2.53	102	104	107	91	97	98
ALTERNATIVE	2.49	93	99	105	89	101	112
INDIE	2.48	96	103	100	90	98	111
REGGAE	2.46	101	101	103	89	99	107
HEAVY METAL	2.33	107	105	111	92	92	95
RHYTHM & BLUES (R&B)	2.33	91	96	102	93	106	110
JUNGLE	2.26	108	102	102	95	96	98
FOLK/TRADITIONAL	2.21	91	94	103	99	100	117

The top 5 or 6 musical types in this second division are all roughly equally popular with a score of between 2.5 and 2.6 out of a maximum 5. In effect they are each popular with roughly half of the target population.

Again one can see the lack of variation between sub-groups within the overall audiences. The interest levels for the remaining 10 musical types are evident here

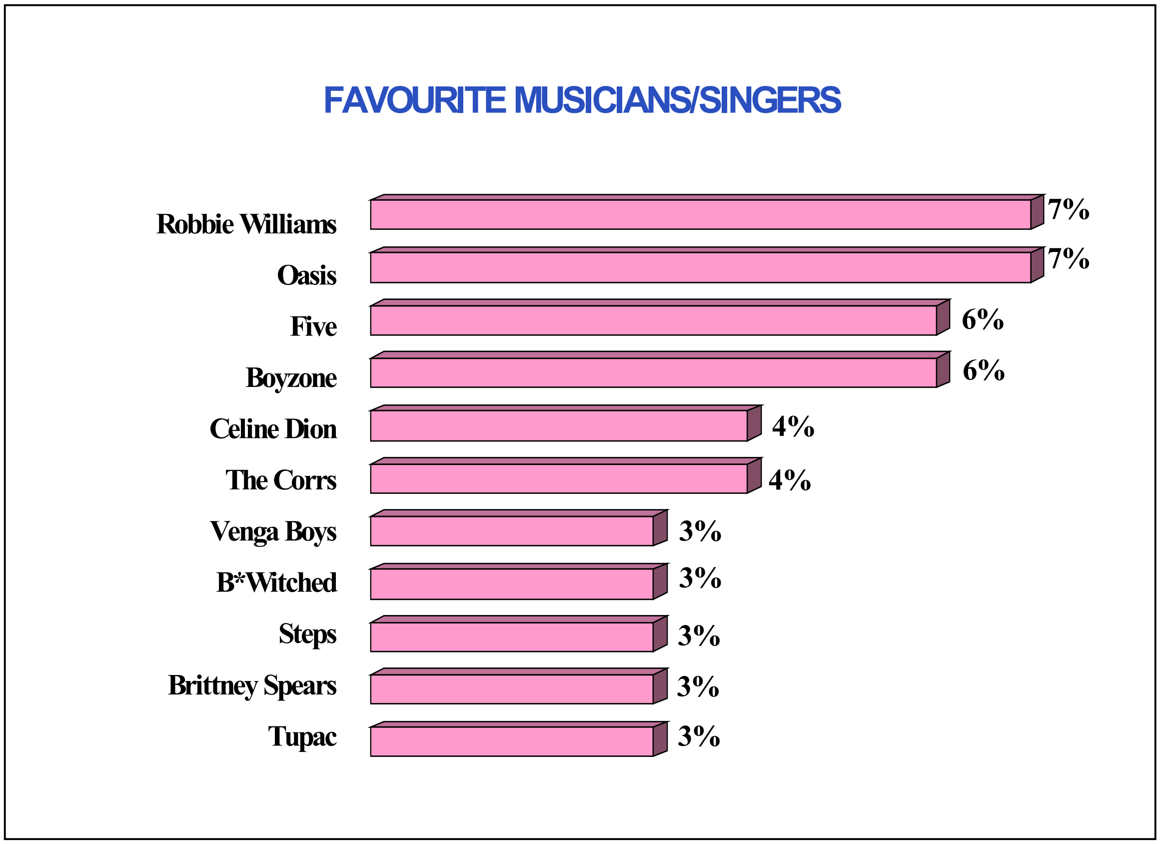
MUSICAL PREFERENCES (3)

(Base: All Respondents)

	SCORE (OUT OF 5)	MALES			FEMALES		
		12-13	14-16	17+	12-13	14-16	17+
		INDEX : AVERAGE = 100					
COUNTRY	2.19	101	95	97	102	101	106
WORLD MUSIC	2.09	99	94	99	99	105	104
JAZZ	2.05	99	98	101	97	97	111
PUNK	2.00	112	101	105	97	93	96
GOSPEL	1.99	94	92	94	109	102	114
CLASSICAL MUSIC	1.99	95	95	97	102	100	116
INDUSTRIAL	1.94	103	102	104	91	101	96
SKA	1.90	105	100	104	93	100	98
GOTHIC	1.89	103	100	100	93	100	102
OPERA	1.66	94	92	102	104	101	113

It can be seen that country music, jazz, classical music and opera all feature in the bottom one third of young people's musical preference. Here again the variations in popularity by sex and age are very small. The one pattern that is evident throughout this whole analysis of musical preference is that females begin to show a slightly higher level of interest in the less mainstream musical genres as they approach their late teens.

An alternative method of analysing musical preference is to examine people's stated favourite musician or singer. Replies to this question were extremely varied but the following chart summarises the top 10 preferences



It is hardly surprising to kind that Robbie Williams and Oasis filled the top 2 slots in this popularity parade.

There are significant differences between males and females and between different age groups as can be seen here:

FAVOURITE SINGER, MUSICIAN, GROUP AT PRESENT

(TOP 10)

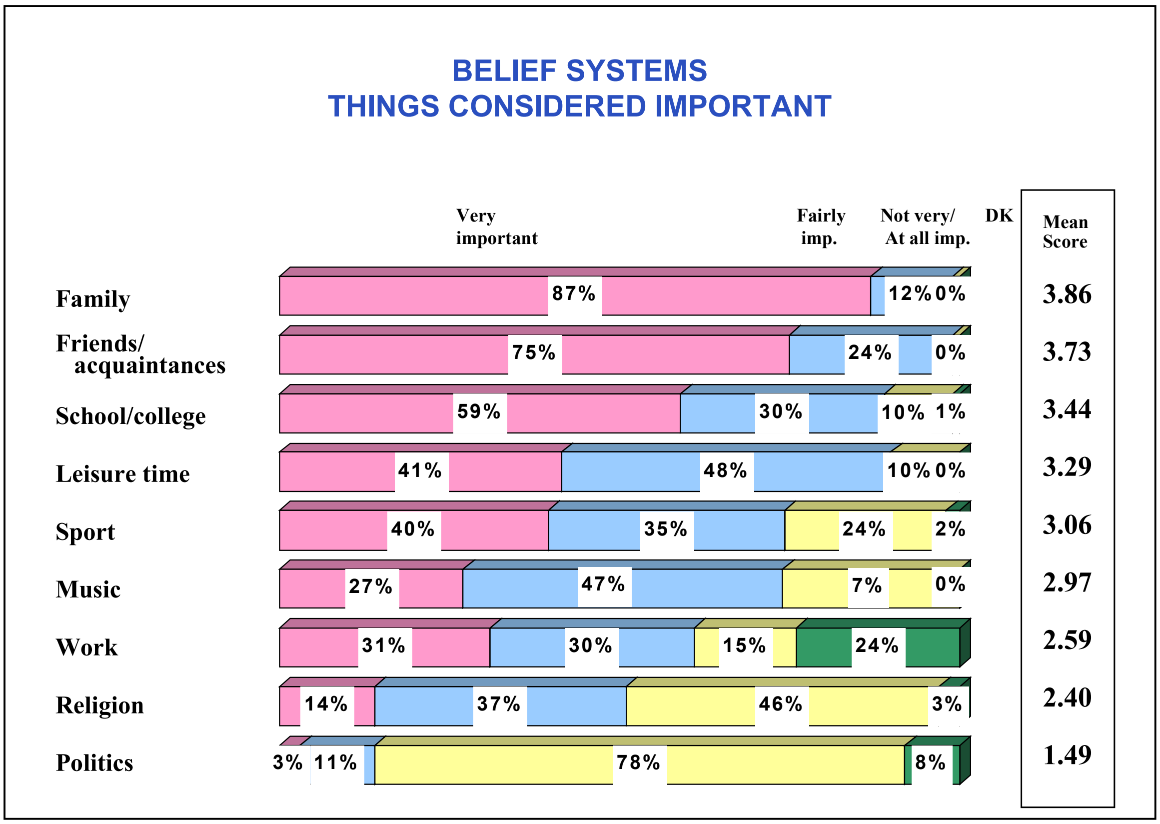
	Total	MALES			FEMALES		
		12-13	14-16	17+	12-13	14-16	17+
	%	INDEX : AVERAGE = 100					
ROBBIE WILLIAMS	7	11	8	3	5	8	6
OASIS	7	9	14	12	1	1	2
FIVE	6	5	1	2	16	10	3
BOYZONE	6	5	2	1	13	8	6
CELINE DION	4	2	1	2	4	8	8
THE CORR'S	4		4	3	4	6	5
VENGA BOYS	3	6	3	1	4	3	3
B*WITCHED	3	6	1	3	8	1	1
STEPS	3	2	1	1	7	5	3
BRITNEY SPEARS	3	2	1	1	10	2	1
TUPAC	3	4	4	2	-	3	1

The appeal of Robbie Williams seems to be extremely broadly based. Oasis are clearly much more popular with males than with females while the opposite is the case for Five, Boyzone, B*Witched and Britney Spears. These latter four are all significantly more popular at the younger end of the female audience.

SECTION THREE
GENERAL BELIEFS

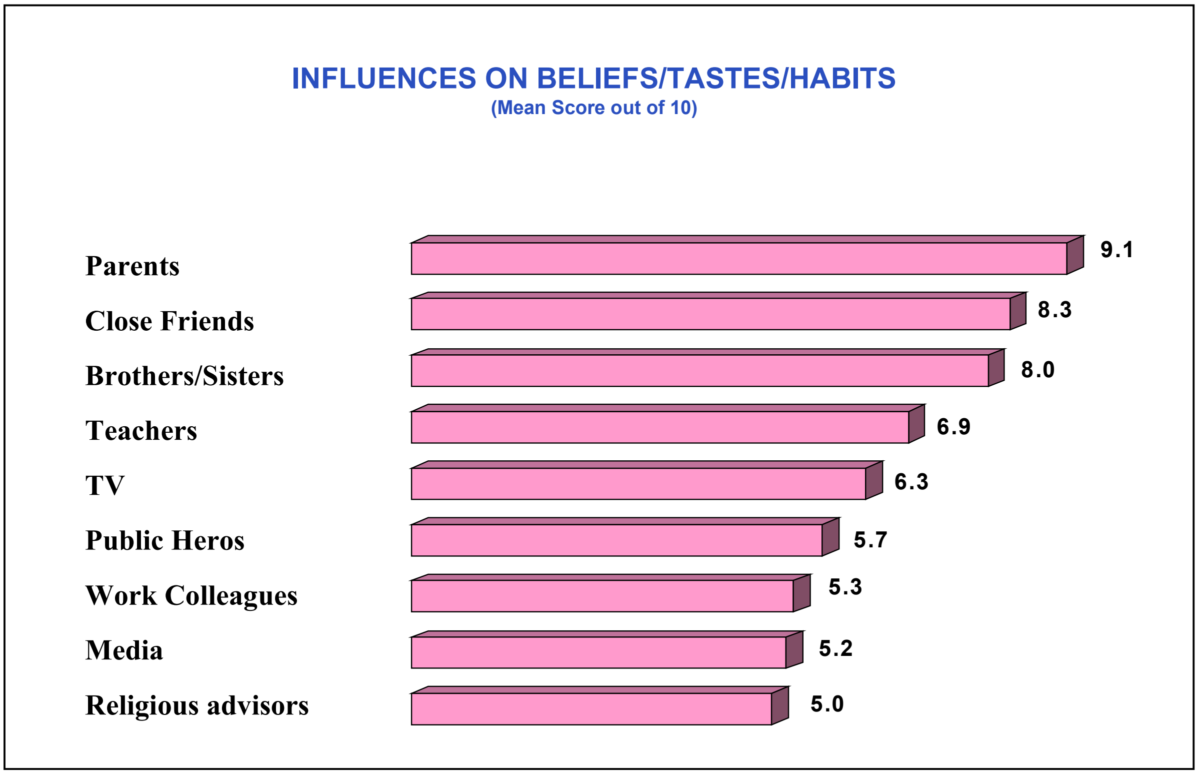
3.1 Family and Friends ahead of everything else

It may come as something of a surprise to parents to find that teenagers place their family at the top of the list of items they considered really important: significantly ahead of sport, music and leisure time as is evident here:



It is not too surprising to find that politics ranks low in the overall priority listing. Religion also ranks quite low in the overall scheme of things, as is evident from the chart.

This pattern is broadly reflected in replies to a question which asked respondents which groups had the greatest influence on their beliefs, tastes and habits. They were invited to give each group a score out of 10, depending on how influential they thought they were. Replies are summarised below



Parents, close friends and siblings are clearly the strongest influences although it is possible that respondents may have understated somewhat the perhaps less overt influence of the media and public heroes. Young people are inclined to down-play the influence of these factors.

3.2 Most Important Personal Traits

Despite the apparent loss of influence of religious leaders, it seems clear that young people still retain the central precept of treating others as they would wish to be treated themselves.

In their estimation, good manners, tolerance and respect for others are the most important personal traits. The rank order of these traits is evident from the following chart

MOST IMPORTANT PERSONAL TRAITS

		MALES			FEMALES		
	TOTAL	12-13	14-16	17+	12-13	14-16	17+
	1200	170	278	152	167	278	155
	%	%	%	%	%	%	%
GOOD MANNERS	67	69	63	55	80	69	66
TOLERANCE AND RESPECT FOR OTHERS	56	47	52	62	46	62	65
INDEPENDENCE	41	29	41	45	35	48	46
FEELINGS OF RESPONSIBILITY	35	35	35	38	35	35	34
HARD WORK	34	41	37	41	35	23	32
DETERMINATION, PERSEVERANCE	30	29	32	38	21	30	32
UNSELFISHNESS	29	26	27	22	29	34	35
IMAGINATION	21	22	22	20	23	18	25
OBEDIENCE	9	8	10	7	13	10	5
THRIFT, SAVING MONEY AND THINGS	8	16	9	11	7	6	3
RELIGIOUS FAITH	8	14	7	4	13	7	6

As one would expect there are marked differences between males and females in the priority they place on some of these personality traits. Shifts are even more evident in age terms. Appreciation of tolerance and respect for others and of independence of mind seems to grow very quickly throughout the teenage years. There is also significant growth evident in the perceived importance of determination and perseverance, particularly among males.

There is a corresponding decline in the perceived importance of thrift and religious faith and, among females particularly in the notion of obedience.

3.3 Most Admired Individual

We saw earlier that young people acknowledge (perhaps to a greater extend that might have been anticipated) the formative influence of their parents on their own belief systems. We see further evidence of this when we consider the claims of young people as to the people they most admire in life. Answers are summarised below

PERSON YOU MOST ADMIRE

	TOTAL	MALES			FEMALES		
		12-13 170	14-16 278	17+ 152	12-13 167	14-16 278	17+ 155
	%	%	%	%	%	%	%
MAM	25	18	16	17	33	35	33
SPORTS PERSONALITY	15	29	26	20	8	2	1
DAD	10	11	16	15	5	5	7
MUSIC PERSONALITY	8	7	6	8	11	9	5
OTHER RELATIVE	7	4	6	3	7	11	14
PARENTS	6	7	5	4	8	6	5
FRIEND	4	1	1	2	7	7	5
ACTOR/ACTRESS	3	1	2	2	3	5	1
OTHER	9	6	5	11	7	10	18
NOT STATED/DK	14	15	17	18	11	10	12

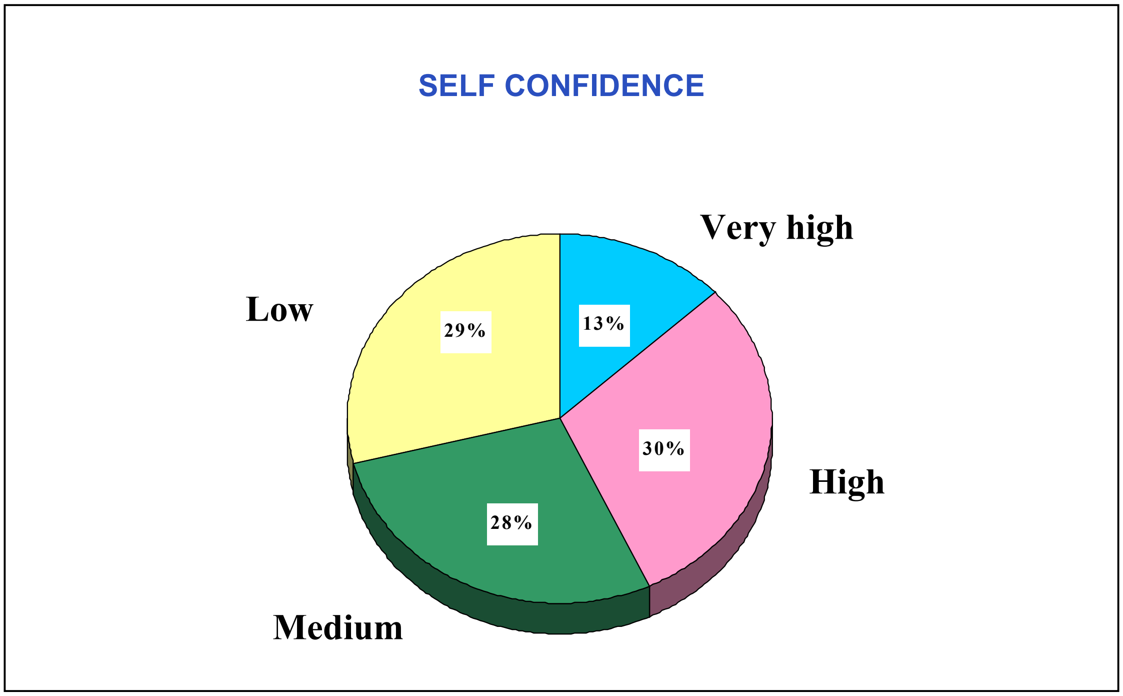
It can be seen that one quarter nominate their mother, about 10% their father and 6% their parents as a couple. The pre-eminence of female influence is something we will see more evidence of later.

The only groups that come anyway close to the same degree of influence are sports personalities (although this is very heavily concentrated among males and particularly younger males) and music personalities (more likely to be nominated by younger females).

It seems to be the case that females also tend to be influenced to an above average degree by relatives outside their immediate family, as they get slightly older.

3.4 Variations in self-confidence

Anybody who has regular contact with groups of young people must be very conscious of the extent of variation one finds in personal self-confidence at this stage of development. In order to explore this in the study, respondents were presented with a list of personal descriptions and were asked which of these applied to them personally. By taking their self descriptions one can cluster young people by degree of self-confidence to produce four groupings along the following lines:



It can be seen that there is a small group of really highly confident people with the remainder roughly equally divided between low, medium and high levels of self confidence.

The basis of this distinction is clear from the following table which summarises the differences in self belief as between these four classifications.

PERSONAL CHARACTERISTICS

	TOTAL	Q12 SELF CONFIDENCE			
		VHIGH	HIGH	MED	LOW
	%	INDEX : AVERAGE = 100			
I USUALLY COUNT ON BEING SUCCESSFUL IN EVERYTHING I DO	40	173	125	100	40
I OFTEN GIVE OTHERS ADVICE	40	183	130	88	40
I LIKE TO ASSUME RESPONSIBILITY	37	205	146	81	22
I AM GOOD AT GETTING WHAT I WANT	35	177	131	91	40
I ENJOY CONVINCING OTHERS OF MY OPINION	32	206	134	81	34
I AM RARELY UNSURE ABOUT HOW I SHOULD BEHAVE	31	187	123	97	39
I OFTEN NOTICE THAT I SERVE AS A MODEL FOR OTHERS	7	286	143	57	14
I OWN MANY THINGS OTHERS ENVY ME FOR	7	329	114	57	14

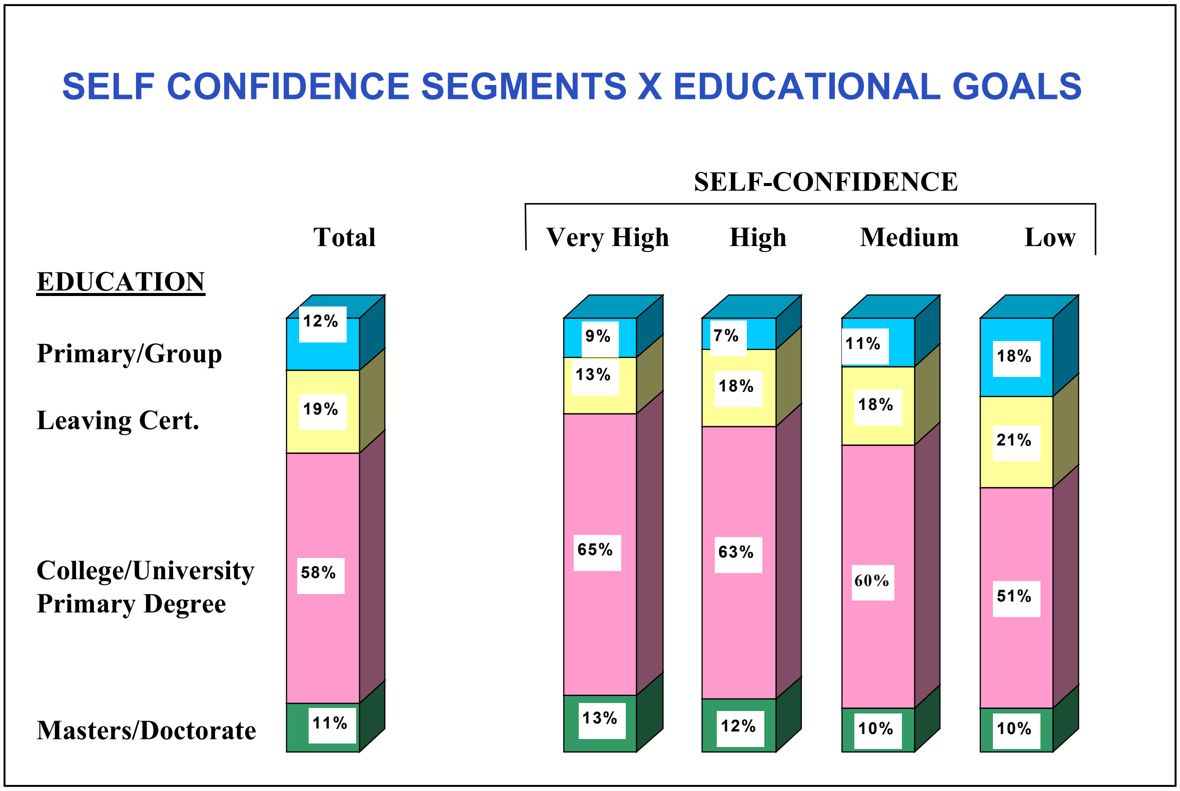
It can be seen that the group who are described as very high in self confidence are more than four times as likely as the low self confidence group to describe themselves as:-

- Usually counting on being successful in everything they do.
- Often giving advice to others
- Being good at getting their way

There are even bigger disparities (of the order of 10 to 1) on dimensions such as:-

- Likely to assume responsibility
- Enjoying convincing others to their point of view
- Rarely feeling unsure about how they should behave in certain circumstances.

The highly self confident group is more likely to be female, slightly older and slightly more middle classed than average. The most direct correlation evident in the data however is between self confidence and expected educational attainment. This is evident in the following chart



In board terms, the higher a person's self confidence, the higher their expected educational attainments.

SECTION FOUR

FAMILY LIFE

We begin this review of family life with the very basic details of family composition.

4.1 Fathers die younger

As can be seen from the following chart, 98% of teenagers in our sample claim to live with their mothers.

FAMILY COMPOSITION

		MALES			FEMALES		
	TOTAL	12-13	14-16	17+	12-13	14-16	17+
TOTAL	1200	170	278	152	167	278	155
MOTHER	98%	98%	99%	95%	99%	98%	95%
FATHER	92%	94%	94%	91%	91%	91%	89%
BROTHER/SISTER	96%	96%	95%	91%	98%	97%	94%
OTHER	6%	5%	4%	5%	7%	7%	7%

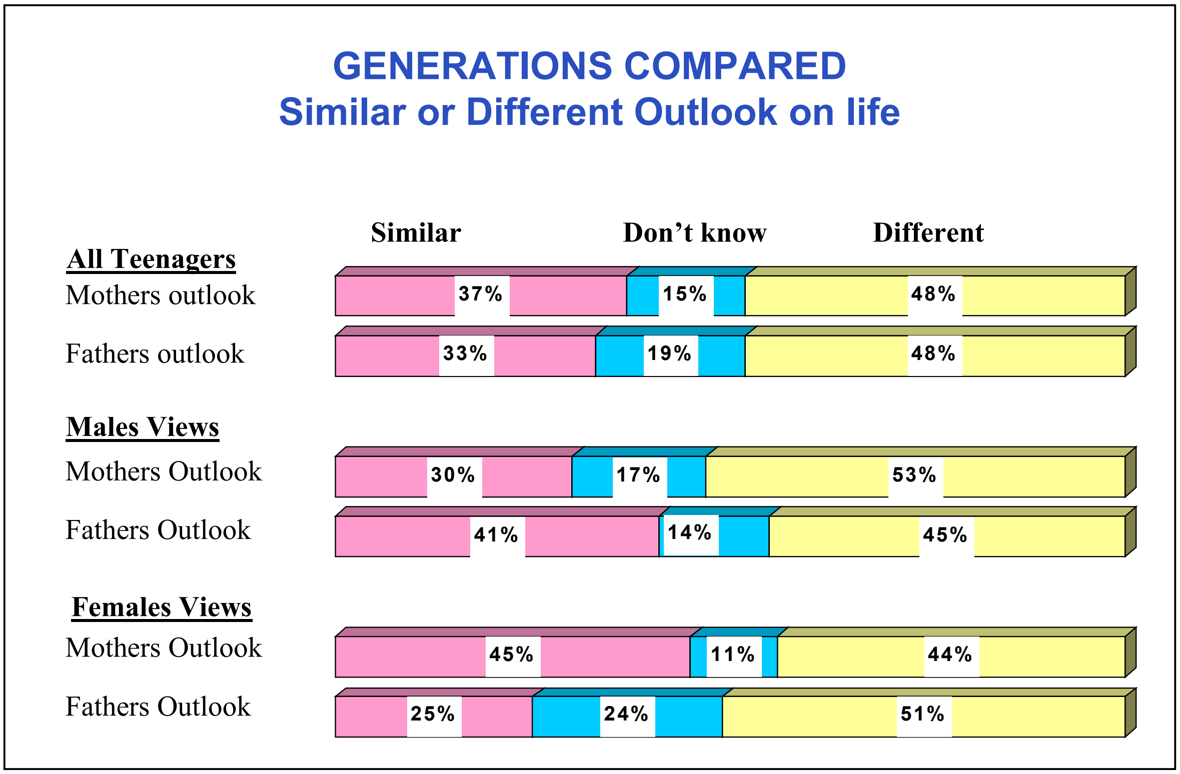
In other words 2% are missing a mother in their lives at this stage. By comparison, 8% are missing a father, reflecting the higher death rate among males or perhaps the higher incidence of broken homes in Ireland in recent years and the tendency for mothers to gain custody in these cases. Interestingly, 96% claim to have at least one sibling living at home with them.

4.2 Families as a melting pot

There has been an enormous amount written over the years about the extent to which children are similar to their parents or not, and whether or not the generations understand each other.

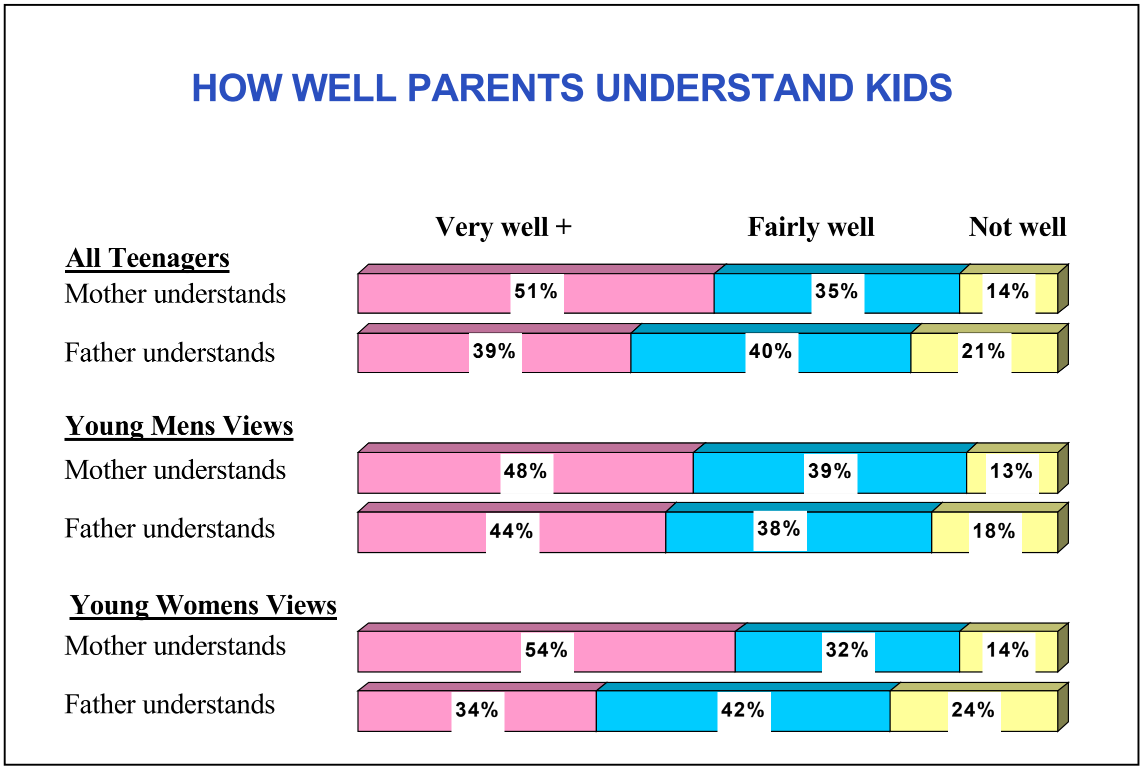
The evidence from the current research suggests that families continue to act as a rather unpredictable melting pot.

Looking first at the extent to which teenagers feel they have a similar or different outlook from their parents we see the following pattern



By and large more teenagers feel that they have a different outlook on life from their parents than a similar one. This is true in relation to both parents although gender differences are quite evident with males tending to feel they are more similar to their fathers in outlook and females, more similar to their mothers.

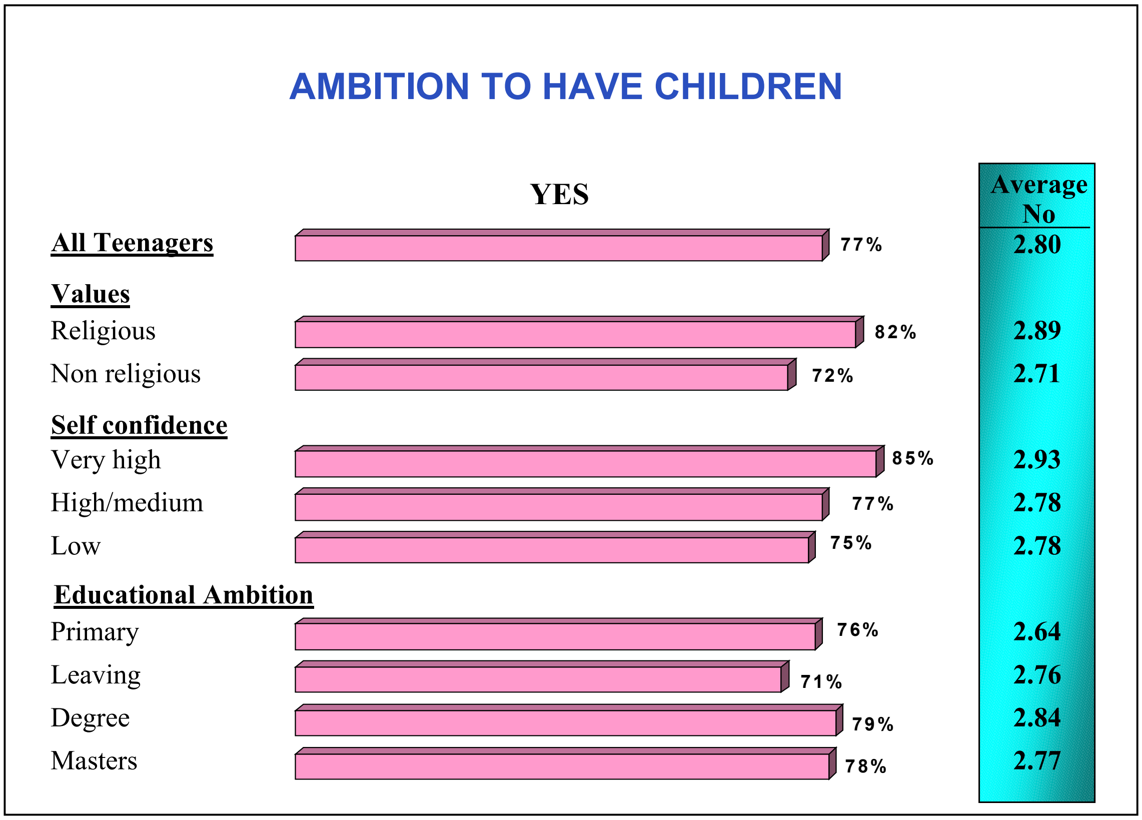
Despite these acknowledged differences in outlook, it remains the case that most teenagers believe that their parents understand them reasonably well as is evident here



Here we can seen however that mothers tend to be regarded as better at understanding their teenage children. This is particularly true in relation to young women but it is evident even among young men. This may explain, in part, the greater acknowledgement of the formative influence of mothers rather than fathers in the earlier part of this report.

4.3 Most wish to have children of their own

As can be seen from the following chart, just over three-quarters of teenagers wish to have children of their own at some stage. Perhaps more surprisingly, almost one in four are not sure whether or not they want children.

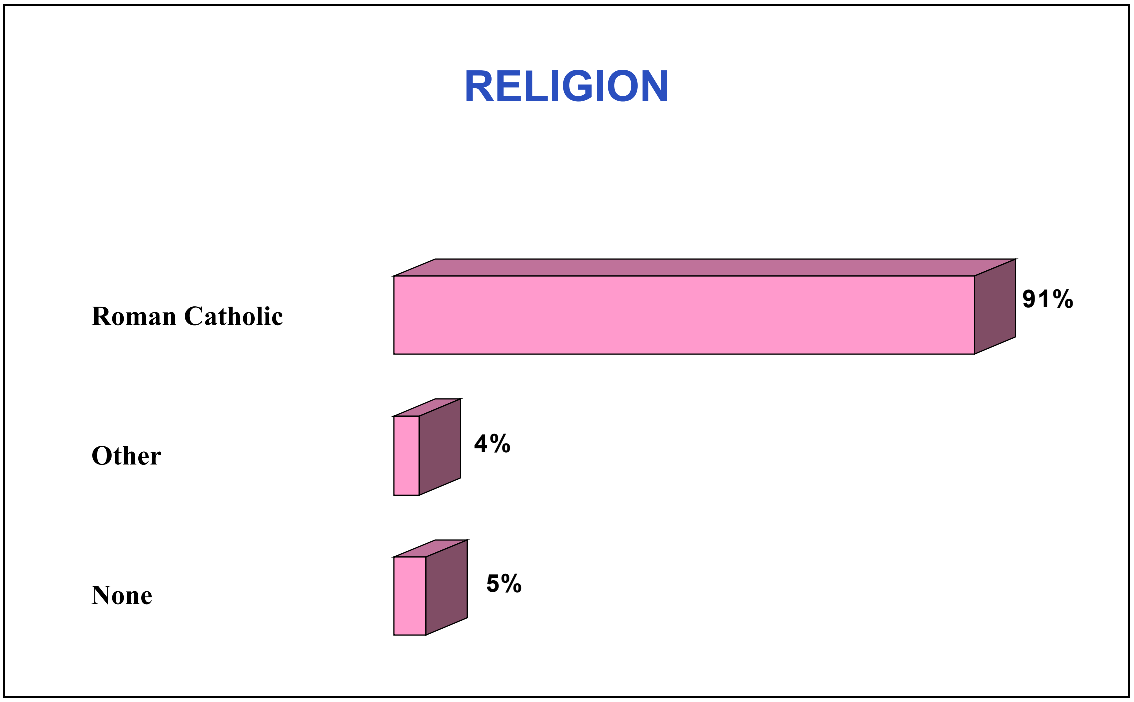


The higher the person's religious convictions and the higher their self confidence, the more likely they are to express a desire to have children. These groups are also more likely to wish to have larger families. Interestingly, among those who do wish to have children, the average number they would like to have, remains relatively high: 2.8.

SECTION FIVE
RELIGIOUS BELIEFS

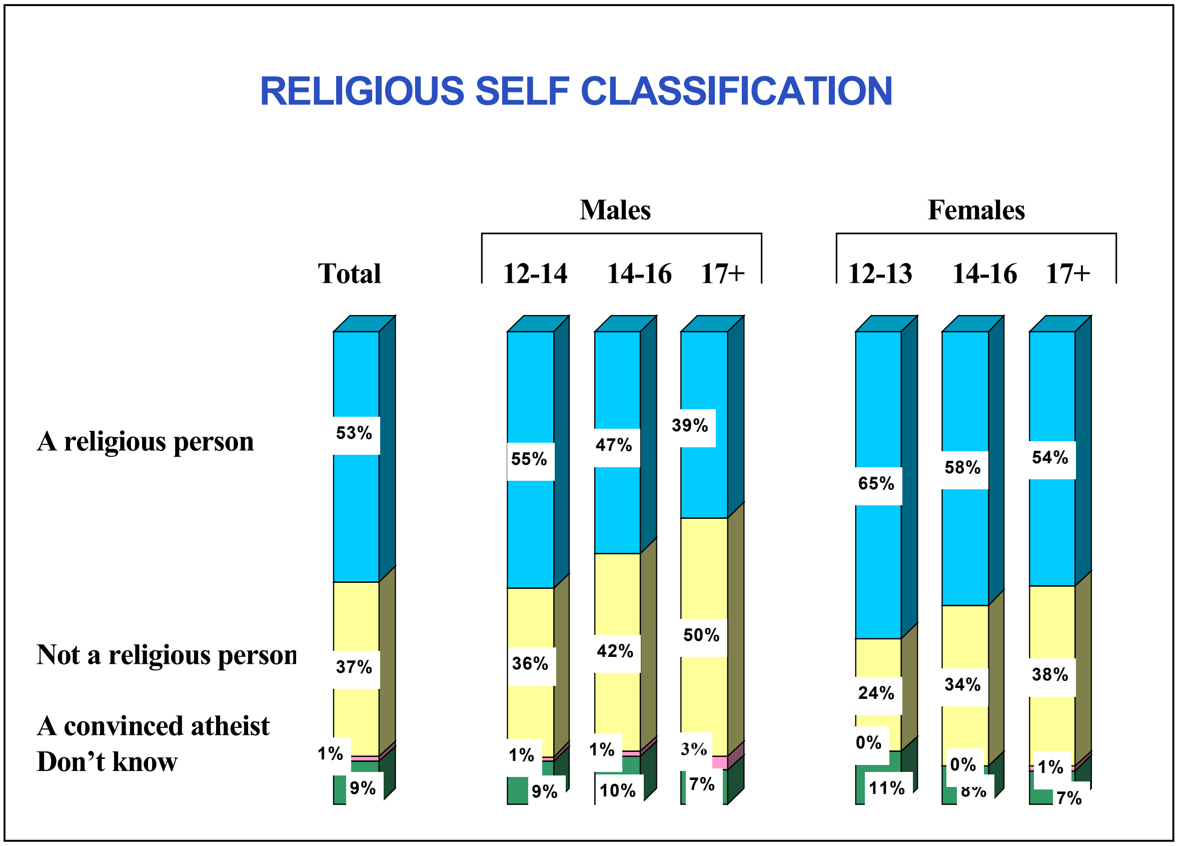
5.1 Religious Conviction – declines rapidly with age

The vast majority of our respondents claimed to be Roman Catholic.



Only 5% claim to have no religious affiliation whatsoever.

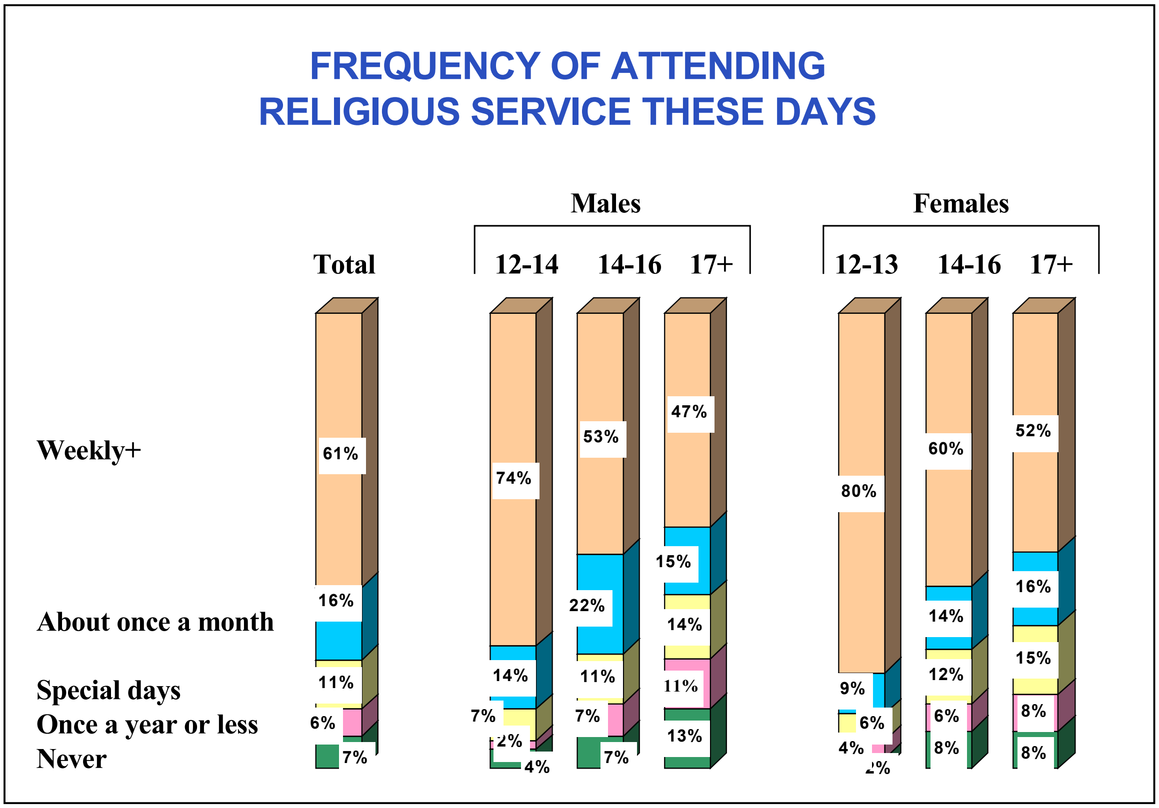
However when our respondents were asked to classify themselves as a religious person or not, only a little over half (53%) described themselves as religious



As can be seen from the chart, religious conviction tends to be significantly lower among males and it declines very rapidly across the age groups. By their late teens, less than 4 in 10 males retain a view of themselves as religious people.

5.2 Church attendance run ahead of religious conviction.

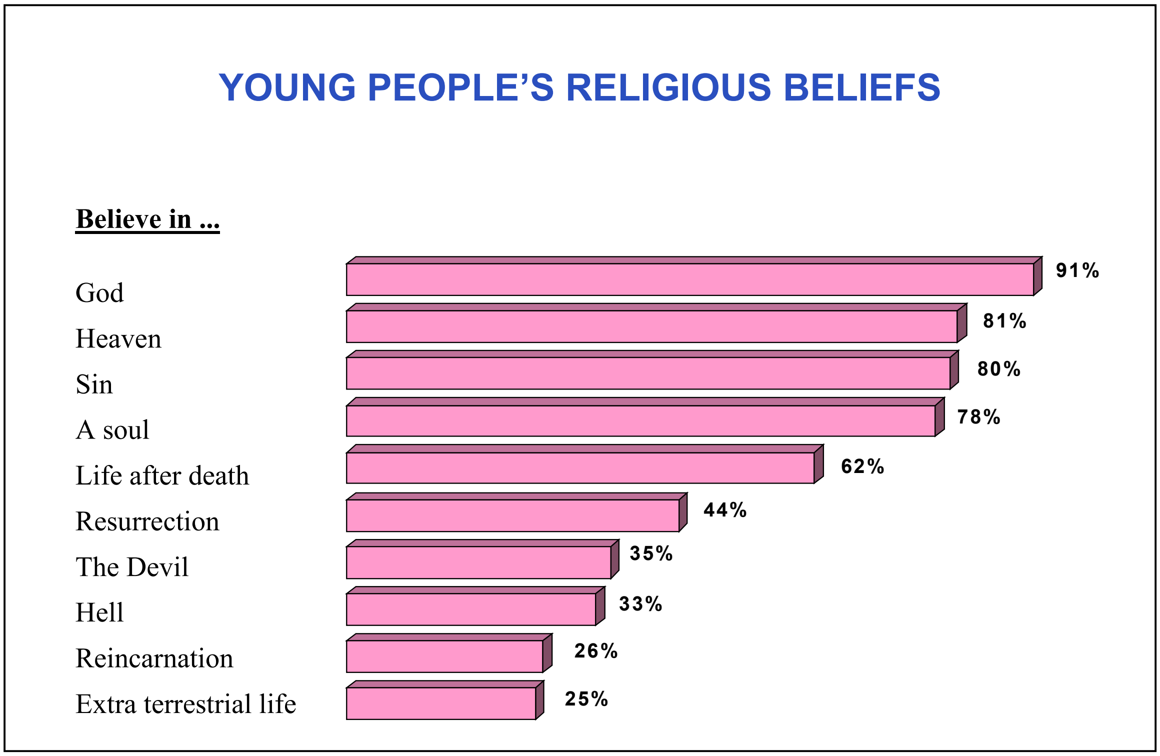
Interestingly, significantly more teenagers attend religious services on a weekly basis or more often than would classify themselves as religious.



Six in ten teenagers attend church services weekly or more often. A rise in non-attendance is very evident as teenagers get older. The difference between males and females, commented on earlier, is also evident in this analysis (with females maintaining a higher loyalty to church attendance).

5.3 What do young people believe in nowadays

This is a question we often hear to nowadays. The following chart gives some of the answers



It can be seen that, despite relatively low figures for church attendance and claimed religious conviction, more than 9 in 10 teenagers continue to express a belief in God and about 8 in 10 maintain a belief in heaven, sin and the soul.

Rather less (62%) are convinced of the notion of life after death and fewer still believe in resurrection, the Devil, hell and reincarnation. Almost as many believe in extra-terrestrial life as believe in reincarnation.

There is an interesting contrast in the extent to which teenagers accept the notions of God and heaven on the one hand or hell and the Devil on the other. In this respect they are not too different from their elders, it must be said.

The extent to which belief systems change throughout the teenage years is evident in the following chart

BELIEFS ...

		MALES			FEMALES		
	TOTAL	12-13	14-16	17+	12-13	14-16	17+
TOTAL	1200	170	278	152	167	278	155
	%	%	%	%	%	%	%
GOD	91	97	91	86	97	90	88
HEAVEN	81	87	81	70	89	82	74
SIN	80	85	78	72	87	82	75
A SOUL	78	80	78	69	85	78	77
LIFE AFTER DEATH	62	67	60	53	67	64	61
RESURRECTION OF THE DEAD	44	45	40	38	56	44	39
THE DEVIL	35	35	32	38	39	36	34
HELL	33	38	32	31	37	30	33
REINCARNATION	26	25	22	20	23	35	25
EXTRA TERRESTRIAL LIFE	25	27	28	26	14	27	23

Interestingly, lack of belief in the Devil and hell are evident, even at the youngest years. The elements which suffer the greatest decline in belief throughout the teenage years seem to be on the issues of Heaven and Life After Death.

SECTION SIX
AMBITIONS

6.1 1 in 3 would prefer to live elsewhere

When given a free choice of where they would like to live, two-thirds of Irish teenagers opt for living in Ireland. One in three would prefer to live elsewhere. As can be seen from the following chart, North America is the next preferred option followed by Europe and Australia.

PREFERRED COUNTRY TO LIVE IN

		MALES			FEMALES		
	TOTAL	12-13	14-16	17+	12-13	14-16	17+
TOTAL	1200	170	278	152	167	278	155
	%	%	%	%	%	%	%
IRELAND	67	74	67	66	69	63	63
NORTH AMERICA	11	11	10	12	13	12	9
EUROPE	8	4	8	6	7	10	8
AUSTRALIA/NZ	5	2	6	6	3	5	9
ELSEWHERE	5	4	4	7	2	6	6
UK	3	4	3	3	4	3	5

Interest in living abroad increases with age and is slightly more marked among females. The choice of location abroad is also somewhat different on the basis of gender. Young men continue to be attracted to North America as they reach their later teenage years. Australia and New Zealand are increasingly becoming attractive options for late teenage females and continental Europe consistently exerts a greater attraction on females than on males.

6.2 Personal aspirations – significant gender differences

The following chart summarises teenagers' personal aspirations

PERSONAL ASPIRATIONS

	TOTAL	MALES 12-13	MALES 14-16	MALES 17+	FEMALES 12-13	FEMALES 14-16	FEMALES 17+
TOTAL	1200	170	278	152	167	278	155
	%	%	%	%	%	%	%
OWNING MY OWN HOME	61	59	50	67	60	65	72
OWNING MY OWN BUSINESS	50	55	55	68	41	43	41
BECOMING A MILLIONAIRE BEFORE I AM 35	37	43	42	45	31	35	28
HAVING CHILDREN	37	29	26	34	45	47	42
BEING FAMOUS	27	32	29	16	35	28	20
REPRESENTING MY COUNTRY IN A SPORT	21	33	31	19	18	13	9
MAKING A RECORD	10	11	9	12	11	9	6
WINNING INTERNATIONAL PRIZES	8	11	12	7	8	6	5
WRITING A BOOK	6	4	5	3	10	6	6
OTHER	4	3	4	3	5	3	5

It can be see that there are significant differences between males and females. Despite significant changes in the workplace in the past ten years, young men continue to be more attracted by the notion of owning their own business than is the case with young females. They also tend to be more attracted by the notion of becoming significantly wealthy at an early age. Females are significantly more attracted by the notion of having children and by the idea of owning ones own home.

Sporting aspirations are another point of major difference although it is interesting that the ambition to represent one's country in a sport tends to decline very rapidly for teenage males once they reach the age of 16. Presumably the reality of sporting prowess has made itself evident by that time.

6.3 Education - recognised as being of paramount importance.

Whatever peoples' personal ambitions, it seems clear that a good education is recognised by teenagers as the most important trait overall in helping people achieve success in their lives.

IMPORTANT TRAITS IN HELPING PEOPLE ACHIEVE SUCCESS

	TOTAL	MALES 12-13	MALES 14-16	MALES 17+	FEMALES 12-13	FEMALES 14-16	FEMALES 17+
TOTAL	1200	170	278	152	167	278	155
	%	%	%	%	%	%	%
A GOOD EDUCATION	72	72	63	72	78	77	76
DETERMINATION	55	48	54	56	44	55	72
INTELLIGENCE	51	55	53	43	56	49	52
BEING GOOD AT GETTING ON WITH OTHER PEOPLE	50	49	44	57	49	55	53
SHEER PERSISTENCE	25	19	26	34	23	21	34
CREATIVITY	17	19	16	14	17	19	14
GOOD CONNECTIONS	14	12	18	22	12	10	11
A PRIVILEGED BACKGROUND	6	8	8	7	5	4	5

Interestingly, females are more convinced of this at an earlier age than is the case for males (perhaps influencing educational attainment).

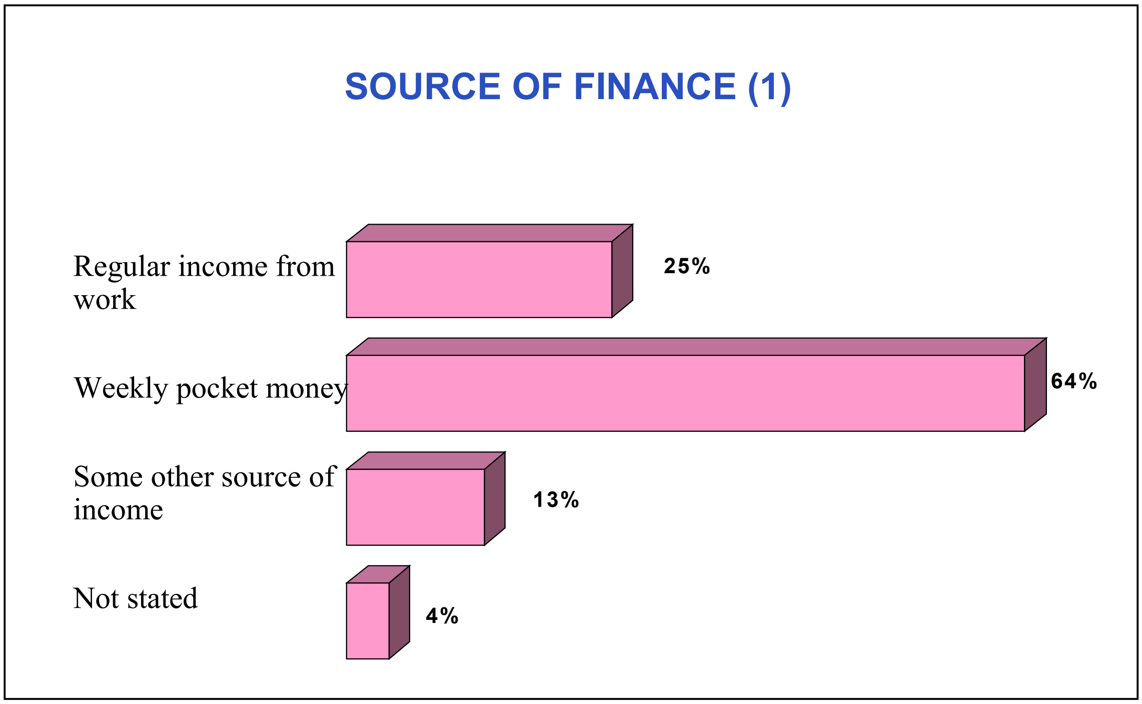
Determination, intelligence and being good at getting on with other people are the next more important determinants of success from the standpoint of teenagers.

SECTION SEVEN

MONEY AND SPENDING

7.1 A surprisingly high proportion work

When teenagers in our survey were asked for their main source of income, it emerged, not too surprisingly, that the majority were dependent on weekly pocket money. However a surprisingly high proportion (1 in 4) claimed to be reliant on regular income from work.



A high proportion also mentioned other sources of income, scholarships, State funding and so on. Examining these data by age group shows a very interesting pattern.

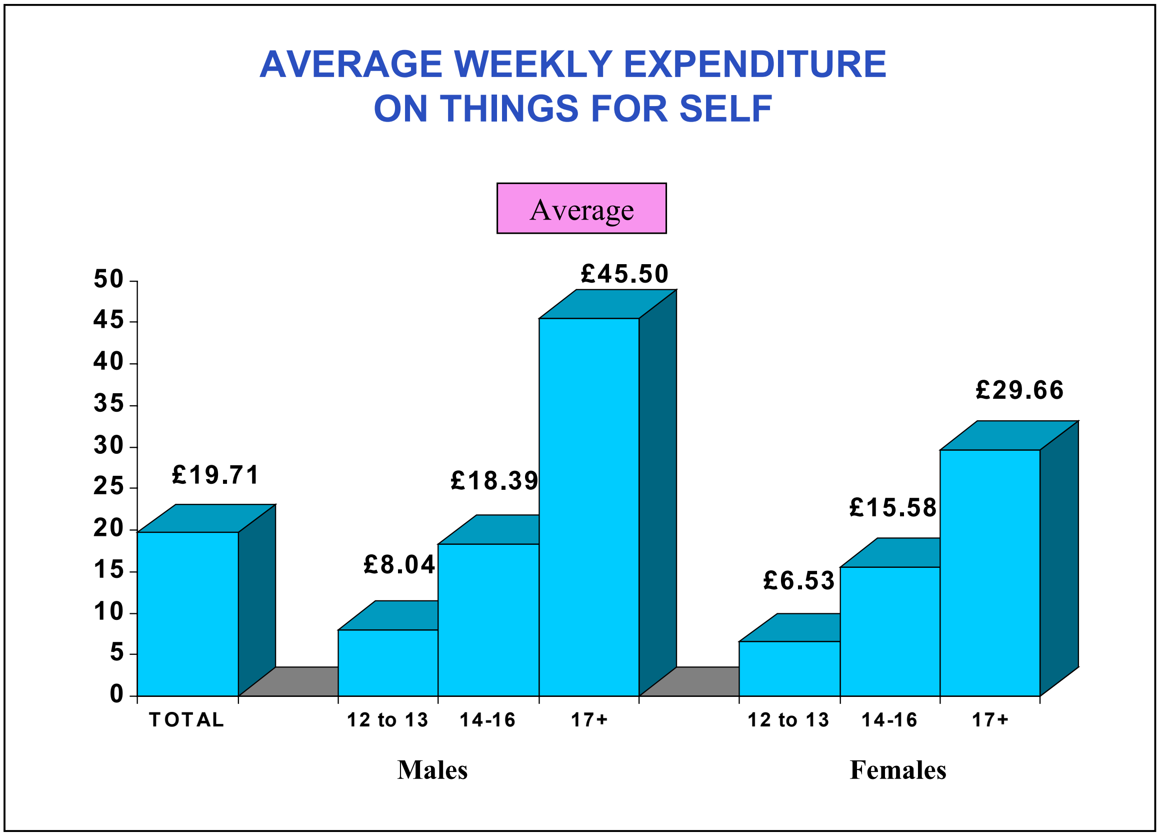
SOURCE OF FINANCE (2)

		MALES			FEMALES		
	TOTAL	12-13	14-16	17+	12-13	14-16	17+
	1200	170	278	152	167	278	155
	%	%	%	%	%	%	%
REGULAR INCOME FROM WORK	25	6	22	55	8	24	43
WEEKLY POCKET MONEY	64	79	69	38	81	65	40
SOME OTHER SOURCE OF INCOME	13	8	13	13	11	13	17
NOT STATED	4	7	4	1	5	5	3

Once they reach their late teenage years, better than 4 in 10 females and a majority of males (55%) have some regular income from work. In most cases this consists of part-time work, given that only a minority of our survey respondents have left the educational system at this stage.

7.2 Average weekly disposable spend - £20

Respondents in our survey were asked, how much they spend on average each week on things for themselves. The average was just under £20, but with remarkable changes by age group as is evident here.



Given the substantial amounts of money involved, it is not too surprising that so many 17 and 18 year olds (males in particular) choose to take on part-time jobs.

The following chart gives some idea of what teenagers spend their weekly money on.

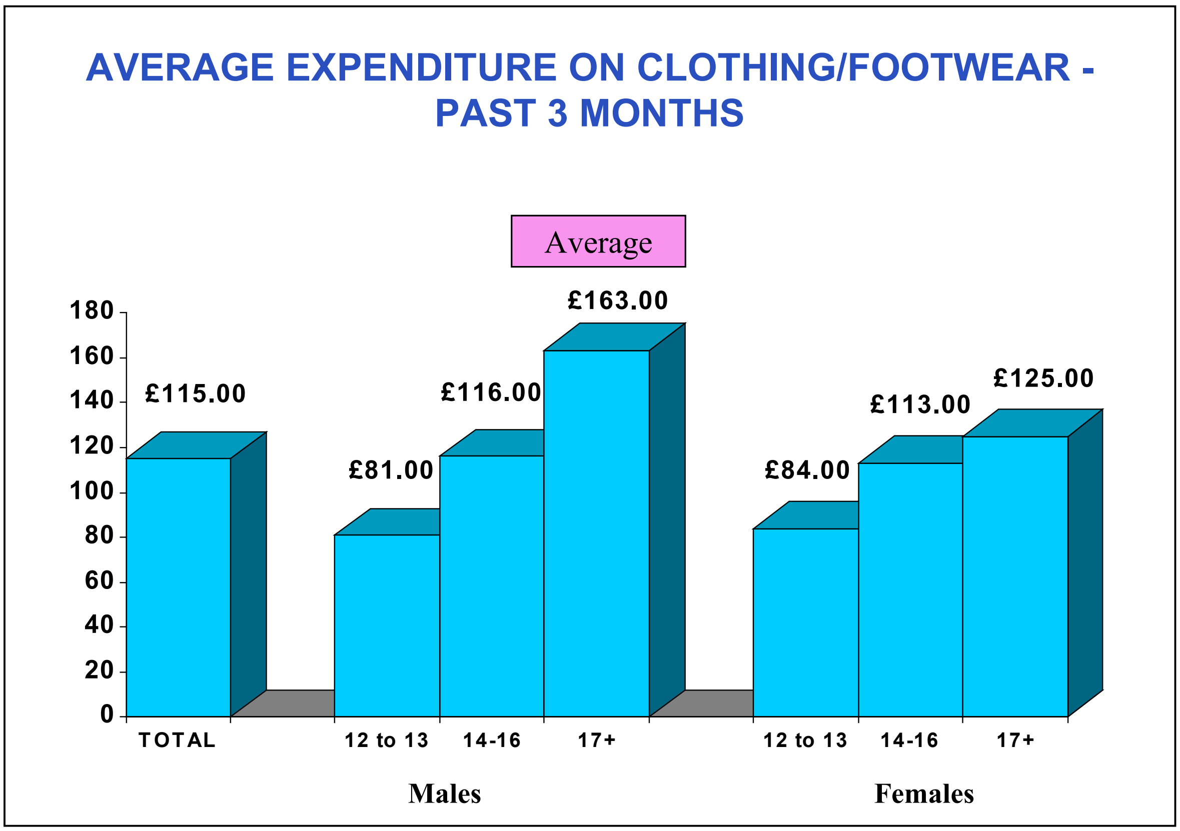
WEEKLY EXPENDITURE

		MALES			FEMALES		
	TOTAL	12-13	14-16	17+	12-13	14-16	17+
TOTAL SPEND	3986	379	856	602	423	1034	692
	%	%	%	%	%	%	%
FOOD AND DRINK	25	39	27	22	34	22	18
RENTING A VIDEO	14	16	17	14	13	12	13
MAGAZINE AND BOOKS	13	14	11	7	17	15	13
GOING TO THE CINEMA	12	12	13	11	13	12	11
GOING TO CLUBS	12	7	11	18	6	11	15
TRAVEL TRANSPORT	8	5	7	11	5	7	9
RECORDS/CD'S ETC.	7	6	8	9	5	7	6
COSMETICS MAKE UP	6	1	2	1	6	10	10
CIGARETTES	4	0	5	6	0	4	5

It can be seen that food and drink is the biggest single item overall with video rental in second place and magazines and books ranking third. Not surprisingly, the proportion of total expenditure going on visits to clubs increases very significantly with age.

7.3 Substantial amounts spent on clothing and footwear

What we have seen so far represents only part of the story. When teenagers were further questioned about the amounts they spend on clothing and footwear the amounts involved also turned out to be substantial. The time period measured is different in this instance: the past three months. The average amount spent is £115. Once again there are significant variations by age group.



Interestingly there is relatively little difference between males and females in the earlier years, but males shoot ahead in their spending in the late teenage years.

SECTION EIGHT

BRAND PREFERENCES

In this section of the report we review teenage brand preferences in a number of key markets:-

8.1 Soft drinks

In the soft drinks market it seems clear than one brand dominates all others.

FAVOURITE SOFT DRINK

		MALES			FEMALES		
	TOTAL	12-13	14-16	17+	12-13	14-16	17+
	1200	170	278	152	167	278	155
	%	%	%	%	%	%	%
COKE	54	50	58	63	48	55	46
7 UP	8	7	9	6	5	6	15
CLUB ORANGE	7	7	7	8	6	7	6
FANTA	6	9	4	5	8	6	6
LILT	4	6	4	3	4	2	3
CIDONA	3	5	5	1	5	3	1
DIET COKE	3	2	0	1	2	8	7
PEPSI	3	4	5	2	4	1	3
LUCOZADE	2	4	3	2	1	1	1
OTHER	8	6	5	9	12	9	7
NOTHING/NOT STATED/NONE	2	-	1	1	3	2	5

More than half of all teenagers nominate Coke as their favourite soft drink. The brand is particularly strong among males at the older end of the age spectrum. Interestingly Coke's dominance among females seems to fall off marginally above the age of 16 where 7 Up peaks in terms of its appeal to teenagers

8.2 Fast-food Outlets

Not surprisingly perhaps, McDonalds is the prime choice here although it is interesting to see that Supermacs are the strongest competitive threat: significantly ahead of Burger King.

FAVOURITE FAST FOOD OUTLET

		MALES			FEMALES		
	TOTAL 1200	12-13 170	14-16 278	17+ 152	12-13 167	14-16 278	17+ 155
	%	%	%	%	%	%	%
MC DONALDS	38	36	41	32	42	38	37
SUPER MACS	16	17	14	16	18	15	17
BURGER KING	7	9	11	5	7	4	6
CHINESE	4	5	3	4	4	3	3
ABRAKEBABRA	3		3	4	2	4	5
EDDIE ROCKETS	2	1	1	3	2	3	2
4 LATERNS	2	1	1	2	1	1	3
OTHER	20	22	17	18	19	22	20
NOTHING/NOT STATED/NONE	10	8	10	15	5	11	7

8.3 Clothing brands

Nike is the dominant brand here although, as can be seen, three brands have sizeable claims on teenager affections

FAVOURITE CLOTHING BRAND

	TOTAL	MALES			FEMALES		
		12-13	14-16	17+	12-13	14-16	17+
	1200	170	278	152	167	278	155
	%	%	%	%	%	%	%
NIKE	25	40	33	18	24	22	10
ADIDAS	15	24	17	11	18	15	4
LEVI'S	14	4	15	27	7	12	22
SUSST	6	1	0	1	6	15	12
WRANGLER	4	4	4	8	4	2	4
REEBOK	3	3	4	4	3	1	1
OTHER	21	13	15	22	27	23	33
NOTHING/NOT STATED/NONE	12	12	12	11	12	10	14

Nike is particularly strong among 12-13 year old males. Levi's come into their own in the late teenage years and Susst comes into second place for females aged over 14.

8.4 Footwear

Nike is also the dominant preference in terms of footwear. In fact the brand's pre-eminence is stronger in this area than in the area of clothing

FAVOURITE FOOTWEAR BRAND

		MALES			FEMALES		
	TOTAL	12-13	14-16	17+	12-13	14-16	17+
	1200	170	278	152	167	278	155
	%	%	%	%	%	%	%
NIKE	39	50	46	36	37	37	23
ADIDAS	18	22	18	16	25	15	14
REEBOK	5	5	6	7	5	5	2
KICKERS	2	1	1	3	2	2	6
FILA	2	2	4	1	0	3	1
SKETCHERS	2	0	0	1	2	5	3
CATERPILLAR	2	2	1	5	1	1	1
DR MARTENS	2	1	0	5	1	1	2
OTHER	15	9	11	14	13	18	25
NOTHING/NOT STATED/NONE	14	6	13	13	15	14	24

Adidas is the second preference here, with Reebok a relatively distant third.

8.5 Hair Care Brands

This is, of course, one area in which there are significant gender differences. Pantene, Wella, Organics and L'Oreal are the most popular brands among females. Brylcreem is the most popular brand among young males, particularly as they reach their late teenage years.

FAVOURITE HAIR CARE BRAND

		MALES			FEMALES		
	TOTAL	12-13	14-16	17+	12-13	14-16	17+
	1200	170	278	152	167	278	155
	%	%	%	%	%	%	%
BRYLCREEM	11	16	22	26	-	1	-
PANTENE	6	1	1	-	11	10	10
WELLA	6	1	3	1	7	9	12
ORGANICS	4	1	1	1	5	9	8
LOREAL	4	1	-	2	4	8	9
SHOCKWAVES	3	1	5	5	1	4	1
HERBAL ESSENCE	3	1	-	1	4	7	5
DAX	3	5	6	5	-	-	1
VO5	2	1	1	1	2	3	3
WASH AND GO	2	1	2	2	2	0	3
HEAD & SHOULDERS	2	2	1	1	2	2	1
OTHER	11	6	6	8	13	19	16
NOTHING/NOT STATED/NONE	45	64	53	47	49	28	31

8.6 Shampoo

It is perhaps more surprising to find significant differences between males and females in regard to shampoo. Part of the difference however is explained by the fact that a high proportion of males don't have any particular preference in regard to shampoo while most females do.

FAVOURITE SHAMPOO

	TOTAL	MALES			FEMALES		
		12-13	14-16	17+	12-13	14-16	17+
	1200	170	278	152	167	278	155
	%	%	%	%	%	%	%
PANTENE	11	5	6	7	12	15	18
ORGANICS	8	2	5	4	11	11	14
HEAD AND SHOULDERS	7	11	8	11	6	4	3
HERBAL ESSENCE	5	2	1	2	9	11	7
WASH AND GO	5	6	8	5	5	1	5
LOREAL	3	1	1	1	3	8	5
VO5	3	1	1	2	4	6	5
WELLA	3	1	1		5	6	5
TIMOTEI	3	2	3	1	4	3	5
FRUCTIS	2	1	1	1	5	3	3
CLINIC	2	3	3	1	1	3	-
PALMOLIVE	2	1	1	2	1	2	3
BRYLECREAM	2	2	2	6	-	0	1
OTHER	10	8	9	11	7	12	13
NOTHING/NOT STATED/NONE	35	54	51	46	28	16	15

Pantene, Organics and Herbal Essence are the three most favoured shampoo brands for young females. Interestingly, Head & Shoulders is significantly more popular with males than with females and it is indeed the single more preferred shampoo brand among males.

8.7 Deodorants

This is another area where there are significant gender differences.

FAVOURITE DEODORANT

	TOTAL	MALES			FEMALES		
		12-13	14-16	17+	12-13	14-16	17+
	1200	170	278	152	167	278	155
	%	%	%	%	%	%	%
LYNX	28	44	60	56	-	1	3
SURE	16	3	5	4	19	28	34
SOFT AND GENTLE	10	-	-	-	16	19	23
IMPULSE	6	-	0	-	16	13	7
MUM	5	-	-	-	7	12	8
OTHER	16	16	13	24	13	16	17
NOTHING/NOT STATED/NONE	20	38	23	18	28	12	7

Lynx is by far the dominant brand choice for deodorants among males. Sure and Soft & Gentle are the two leading brands for females in this area.

8.8 Make-Up

Preferences in make-up among teenage females only become evident to a significant degree after the age of 13.

FAVOURITE MAKE-UP

	FEMALES 600	12-13 167	14-16 278	17+ 155
	%	%	%	%
RIMMEL	13	7	17	14
MAX FACTOR	9	4	10	14
NO 7	5	3	5	8
L'OREAL	3	2	4	3
COVER GIRL	3	1	4	5
OIL OF ULAY	3	1	3	4
REVLON	2	1	1	5
ELIZEBETH ARDEN	2	1	1	4
OTHER	14	7	15	21
NOTHING/NOT STATED/NONE	45	74	39	23

Rimmel and Max Factor are the two preferred brands overall.

8.9 Perfume

It seems clear that perfumes are a very personal preference. The most preferred brand overall among female teenagers only accounts for 8% of all preferences.

FAVOURITE PERFUME

	FEMALES 600	12-13 167	14-16 278	17+ 155
	%	%	%	%
SO	8	6	12	5
C.K	7	3	9	6
TOMMY GIRL	5	2	7	5
EXCLAMATION	5	3	6	4
CK1	5	3	5	6
WHITE MUSK	4	7	4	2
OTHER	36	24	36	51
NOTHING/NOT STATED/NONE	30	52	22	21

There are five brands in contention for the overall preference slot. Interestingly as teenage females get older they develop a significantly higher level of interest in perfumes but the brands that benefit from this are all smaller, more individualist tastes.

8.10 Aftershave

Males seem to be slightly more conformist in their preferences for aftershave lotion as is evident here:

FAVOURITE AFTERSHAVE LOTION

	MALES 600	12-13 170	14-16 278	17+ 152
	%	%	%	%
LYNX	15	10	15	21
BRUTE	4	2	3	8
OLD SPICE	2	0	2	5
HUGO BOSS	2	1	1	5
TOMMY HILLFIGGER	2	1	1	5
GILLETTE	2	1	1	4
OTHER	14	4	14	24
NOTHING/NOT STATED/NONE	59	82	61	28

Lynx runs significantly ahead of all other brands in terms of preference. It is the choice of 15% of all teenagers and for more than 1 in 5 of those at the upper end of the age spectrum.

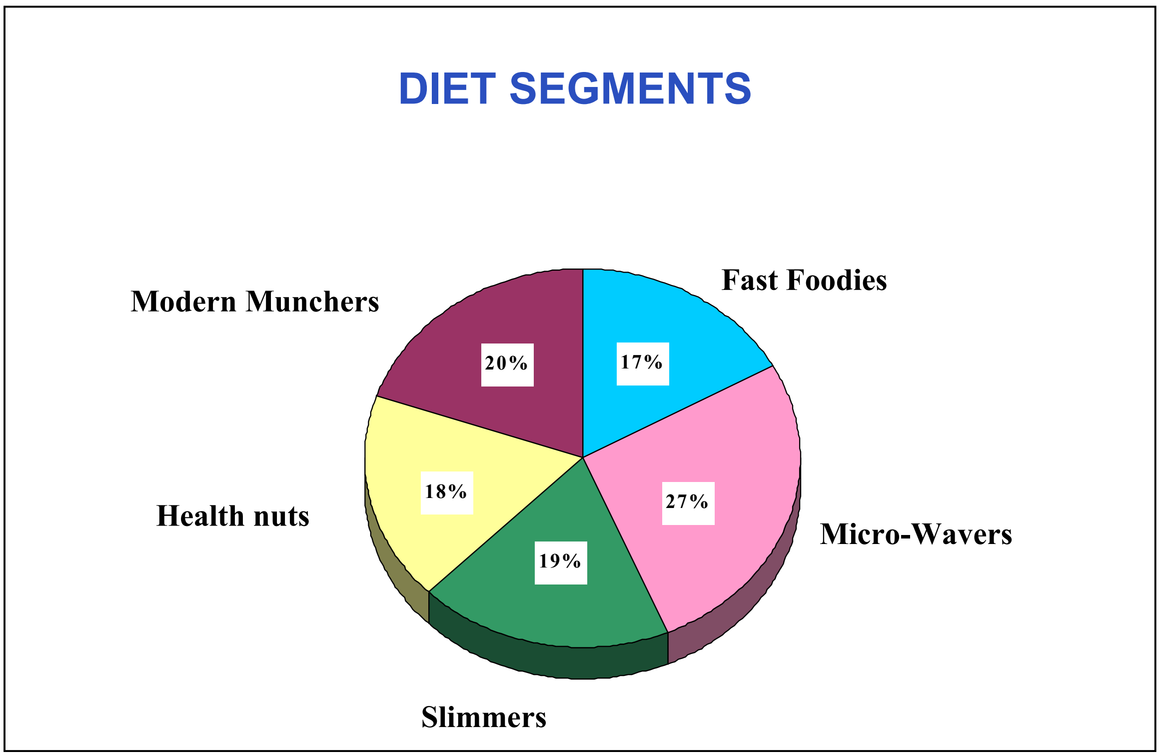
SECTION NINE
EATING, DIET & HEALTH

In earlier lifestyle studies carried out on behalf of the Institute, there has been a significant focus on people's eating habits and consumer segmentations deriving from these.

Given the narrow age focus of the target audience for the current survey, there was some considerable doubt as to whether it might be possible to segment teenagers on a similar basis. The evidence from the current study suggests that there is sufficient variation, even among such a narrowly defined age grouping, to allow for such a segmentation.

9.1 The basic segments

Based on people's reported eating patterns it is possible to divide teenagers into five discrete segments as follows:-



In brief, the segments can be described as follows:-

- Microwavers (27% of the population) young people with a distinctively high pattern of cooking for themselves and also for using microwaves.

- Modern Munchers (20%). These are young people who have taken on board a complex of modern tendencies. They eat out to a significantly above average degree are “into” more exotic cuisine, have an intense interest in healthy foods (salads, cottage cheese, muesli etc.) but are at the same time intensive snackers and fast-food eaters.

- Slimmers (19%) primarily distinguished by their appetite for low fat and overtly healthy products. They also have a high interest in exotic foods but are the lowest users of fast food restaurants or regular as opposed to diet soft drinks. The opt for the diet variety.

- Health Nuts (18%): they are into healthy foods but not specifically low fat ones.

- Fast Foodies (17%) these are primarily distinguished by their high incidence of usage of fast food restaurants and take-away shops. They are not particularly experimental (except for Chinese take-aways) and have a very low interest in health foods of any kind.

These differences are highlighted in the following charts

EATING HABITS X DIET SEGMENT (1)

	OCC. Per month	FAST FOODIES	MICRO WAVER	SLIMMERS	HEALTH NUTS	MODERN MUNCHER
		INDEX AVERAGE = 100				
TAKE SNACKS BETWEEN MEALS	22.23	105	98	94	94	108
EAT FRESH VEGETABLES	18.29	75	97	102	111	113
DRINK REGULAR FIZZY SOFT DRINKS LIKE COKE, 7 UP ETC.	17.98	117	100	83	90	110
EAT FRUIT	17.63	79	100	99	101	119
EAT YOGURT	12.51	41	101	86	131	135
USE A MICROWAVE	12.49	82	128	111	36	123
EVER COOK FOR YOURSELF	8.17	69	135	115	34	124
EAT CANNED BEANS OR PEAS	7.25	101	104	85	94	113
EAT SALADS	6.88	23	84	87	141	162
EAT ANY OTHER FROZEN FOODS	6.63	97	95	104	85	119

EATING HABITS X DIET SEGMENT (2)

	OCC. Per Months	FAST FOODIES	MICRO WAVER	SLIMMERS	HEALTH NUTS	MODERN MUNCHER
		INDEX AVERAGE = 100				
VISIT A FAST FOOD RESTAURANT	5.64	154	84	62	77	130
DRINK DIET SOFT DRINKS	5.61	57	112	184	85	57
DRINK VITAMIN ENRICHED MILK (SUPERMILK ETC)	4.41	84	76	106	103	137
DRINK LOW FAT OR SKIMMED MILK	4.23	53	60	269	93	46
BUY FOOD FROM A TAKE-AWAY SHOP (CHINESE, FISH AND CHIPS ETC.)	4.17	157	61	73	75	148
HAVE A FRIED BREAKFAST	3.98	97	102	86	79	130
EAT FROZEN FISH PRODUCTS	3.75	100	99	78	107	116
EAT LOW FAT OR DIET PRODUCTS	3.52	65	88	225	90	42
EAT ANY OTHER CANNED PRODUCT (FISH, VEGETABLES ETC.)	3.46	88	95	86	109	121
EAT FOOD CONTAINING GARLIC	3.01	40	50	192	47	179

EATING HABITS X DIET SEGMENT (3)

	OCC. Per month	FAST FOODIES	MICRO WAVER	SLIMMERS	HEALTH NUTS	MODERN MUNCHER
		INDEX AVERAGE = 100				
EAT MUESLI	2.44	32	65	148	120	144
EAT COTTAGE CHEESE	2.07	29	60	52	198	171
EAT CHINESE OR INDIAN FOOD	1.96	160	14	157	33	170
EAT ANY READY PREPARED MEALS (TV DINNERS, LEAN CUISINE, HEALTHY OPTIONS ETC)	1.71	103	86	121	69	124
EAT CONTINENTAL DISHES - FRENCH, ITALIAN ETC.	1.69	102	13	215	35	163
DRINK DECAFFEINATED COFFEE	1.60	95	61	150	122	91
GO OUT TO A RESTAURANT FOR LUNCH/DINNER	1.39	103	74	103	81	146
HAVE PARTIES AT HOME	0.35	133	100	79	62	124

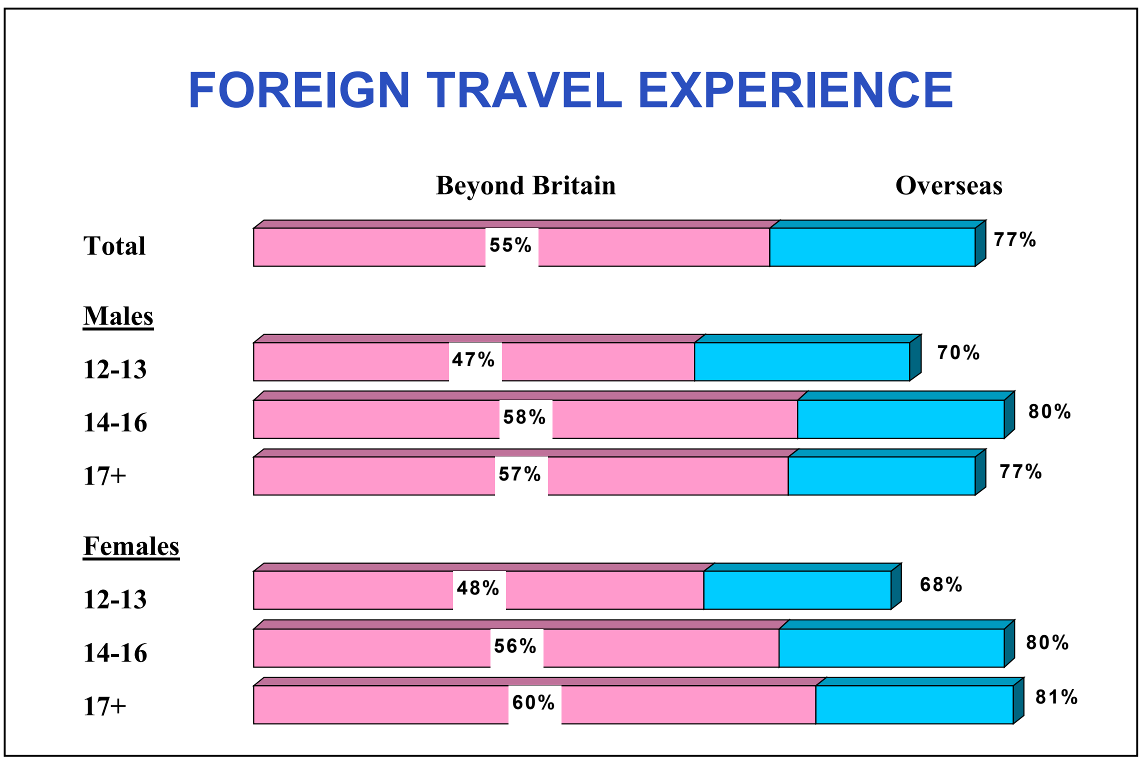
SECTION TEN

TRAVEL EXPERIENCE

The point is often made that Irish people are quite enthusiastic foreign travellers. Our young people seem to be following an established pattern.

10.1 Three out of four have been overseas at some stage

Better than three out of four teenagers have travelled overseas at some stage. Even if we exclude those people who have only visited our nearest neighbours in Britain, it is still the case that more than half has travelled further afield.

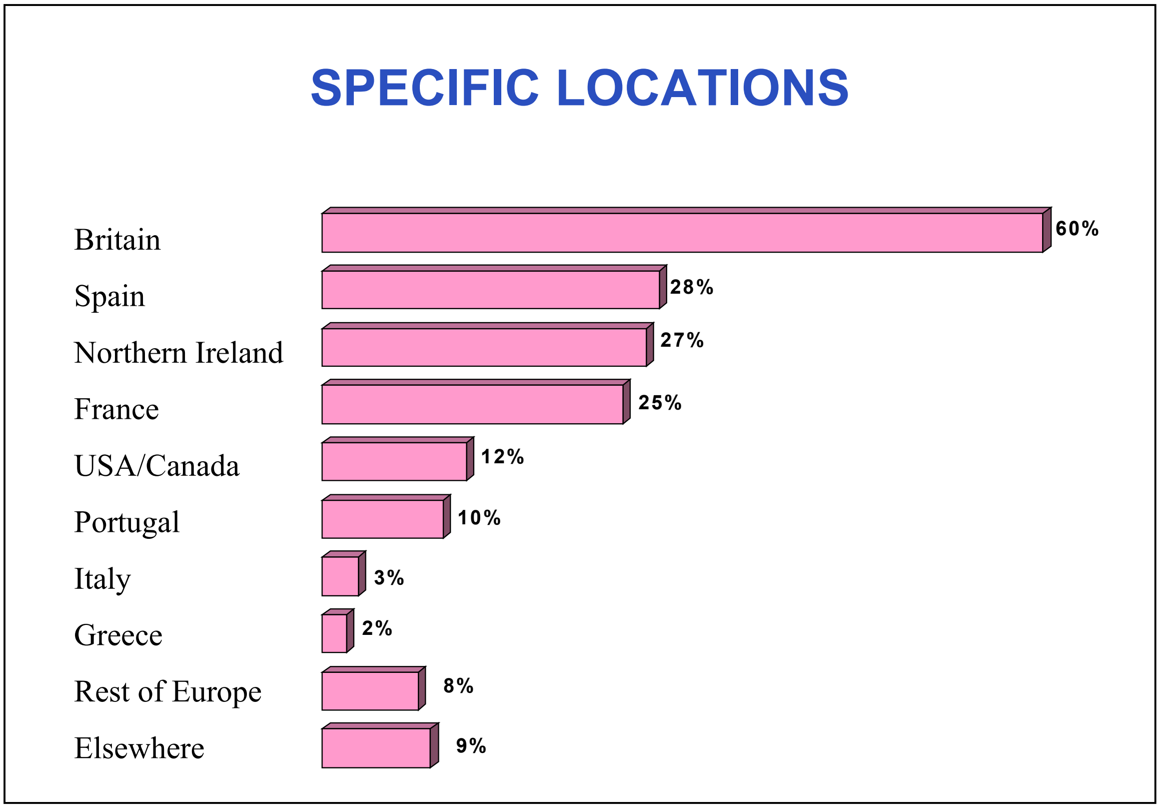


Among those in their late teens approximately 6 in 10 have travelled further afield than Britain.

The indicators suggest that the travel bug bites males and females alike.

10.2 More of our teenagers have visited Spain than Northern Ireland.

The following chart summarises the locations outside the Republic of Ireland visited by Irish teenagers.

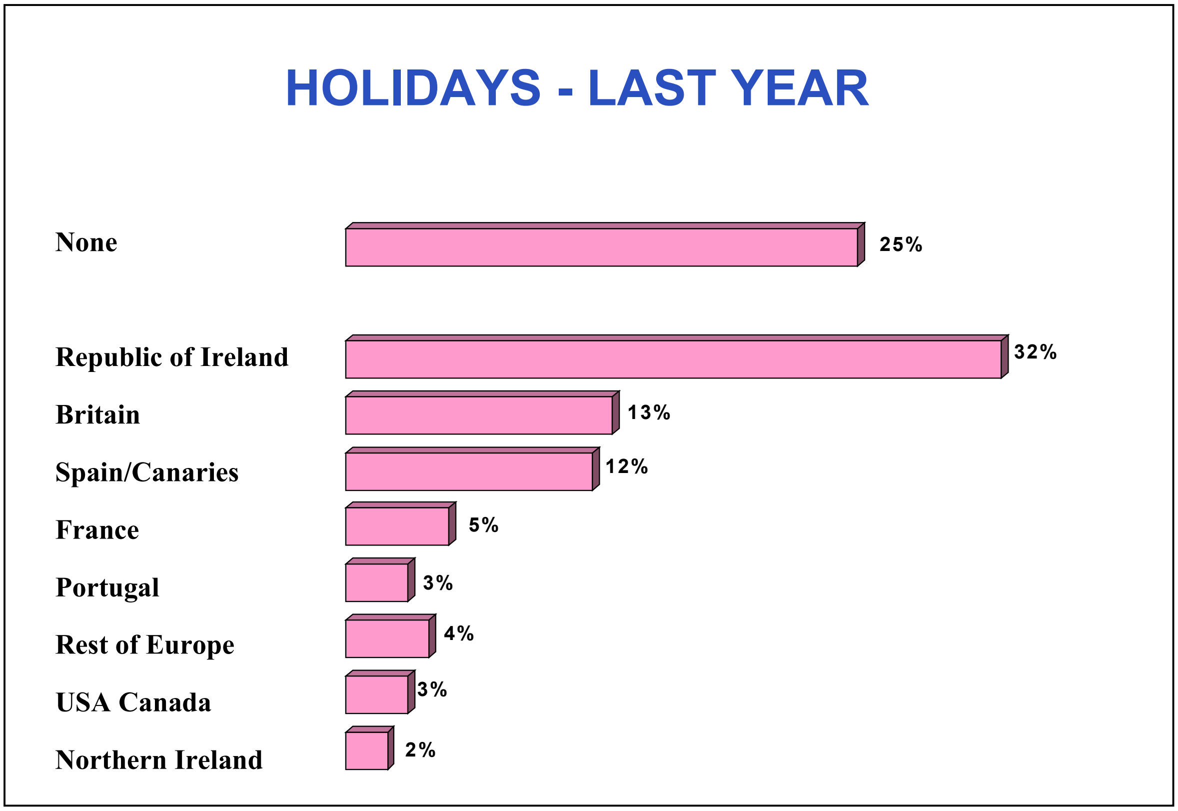


Britain is not surprisingly the location visited by the largest group of teenagers. In all, 6 out of 10 Irish teenagers have been to Britain at some stage. Substantial numbers have also been to locations such as Spain and France. It is interesting that slightly more teenagers seem to have visited Spain than to have visited Northern Ireland. Indeed almost as many have visited France as have been to Northern Ireland.

Substantial numbers have been to other destinations as well. One of the interesting points is that as many as 1 in 8 teenagers have been on a Transatlantic trip.

10.3 No signs of abatement

Interest in foreign travel seems to be continuing to run at a high level. When respondents in the survey were questionned about their holidays taken in the last year it emerged that three-quarters had been on such a holiday and more than half of these had holidays abroad.



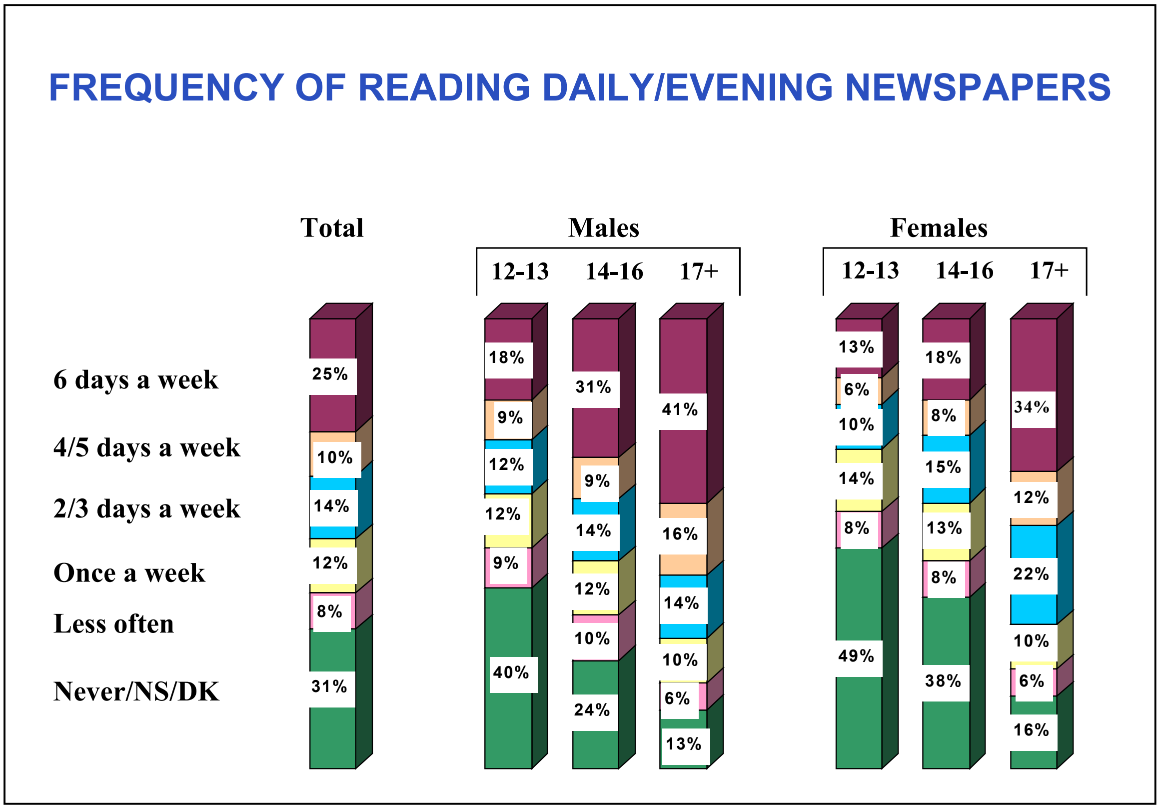
While the Republic of Ireland is the biggest single destination for main holidays, the numbers taking holiday abroad when aggregated, is actually higher than the number taking a home holiday.

SECTION ELEVEN
THE MEDIA

In this section of the report we summarise young people's usage, of and attitudes towards, some of the main media: print, radio and television.

11.1 Newspapers

The following chart summarises the claimed frequency of reading daily newspapers by young people



The readership levels are perhaps higher than the stereotype might suggest. It is also quite clear that interest in reading daily papers as teenagers move up the age scale.

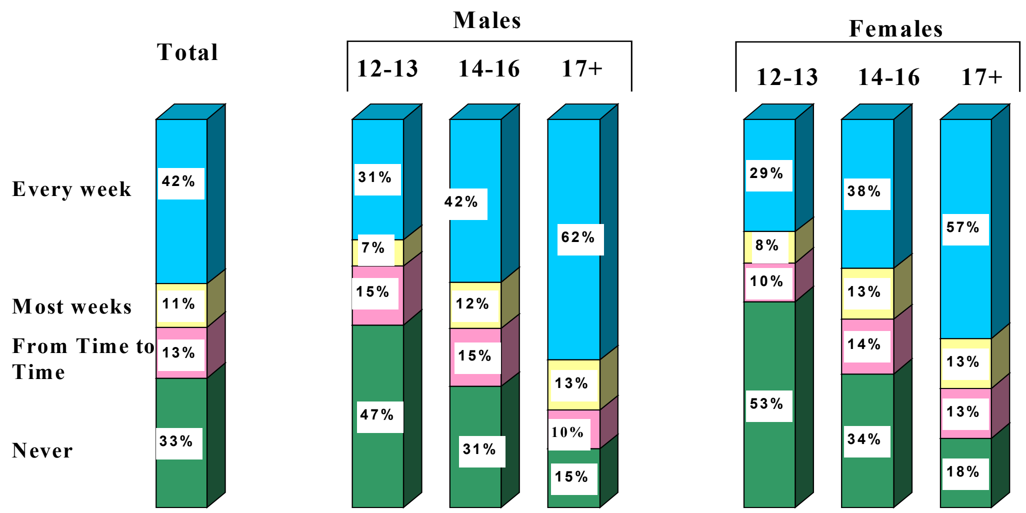
By comparison with their older counterparts, there is a heavier focus on tabloids among this target group.

DAILY PAPERS READ MOST OFTEN

	TOTAL	MALES			FEMALES		
		12-13	14-16	17+	12-13	14-16	17+
Mornings	%	%	%	%	%	%	%
Irish Independent	25	26	21	31	29	20	32
The Star	25	16	27	25	24	30	23
The Sun	19	23	21	26	14	18	11
Irish Times	6	5	5	6	2	7	8
Examiner	5	5	5	2	4	5	8
Mirror	5	5	6	2	5	4	5
Evenings							
Evening Herald	23	17	27	20	21	22	24
Evening Echo	3	6	2	2	7	1	5

Two-thirds of teenagers read a Sunday newspaper at least occasionally and more than half read a Sunday paper on most weeks. Here again there is a very clear increase in reading newspapers as one moves up the teenage years.

FREQUENCY OF READING SUNDAY PAPER



Imported titles make up about one-third of the total Sunday readership and this does not vary significantly across age groups as is evident here

SUNDAY PAPER READ MOST OFTEN

		MALES			FEMALES		
	TOTAL 1200	12-13 170	14-16 278	17+ 152	12-13 167	14-16 278	17+ 155
	%	%	%	%	%	%	%
SUNDAY WORLD	25	18	27	31	19	26	32
SUNDAY INDEPENDENT	21	15	21	32	13	19	32
NEWS OF THE WORLD	14	12	15	18	10	13	14
SUNDAY MIRROR	4	2	4	5	3	6	3
SUNDAY PEOPLE	4	4	3	3	4	3	6
SUNDAY TIMES	4	4	3	5	1	4	5
IRELAND ON SUNDAY	3	1	4	5	1	3	5
SUNDAY TRIBUNE	2	2	3	3	1	2	3
OTHERS	2	2	3	3	1	1	1

Looking at the individual titles it can be seen that the Sunday World is the most popular choice overall among teenagers and, by comparison with their older counterparts the broadsheets generally fare rather less well among teenagers than with adults.

Readership of magazines at this age level is very diverse and highly dependent on age and gender as is evident here

MAGAZINES READ NOWADAYS

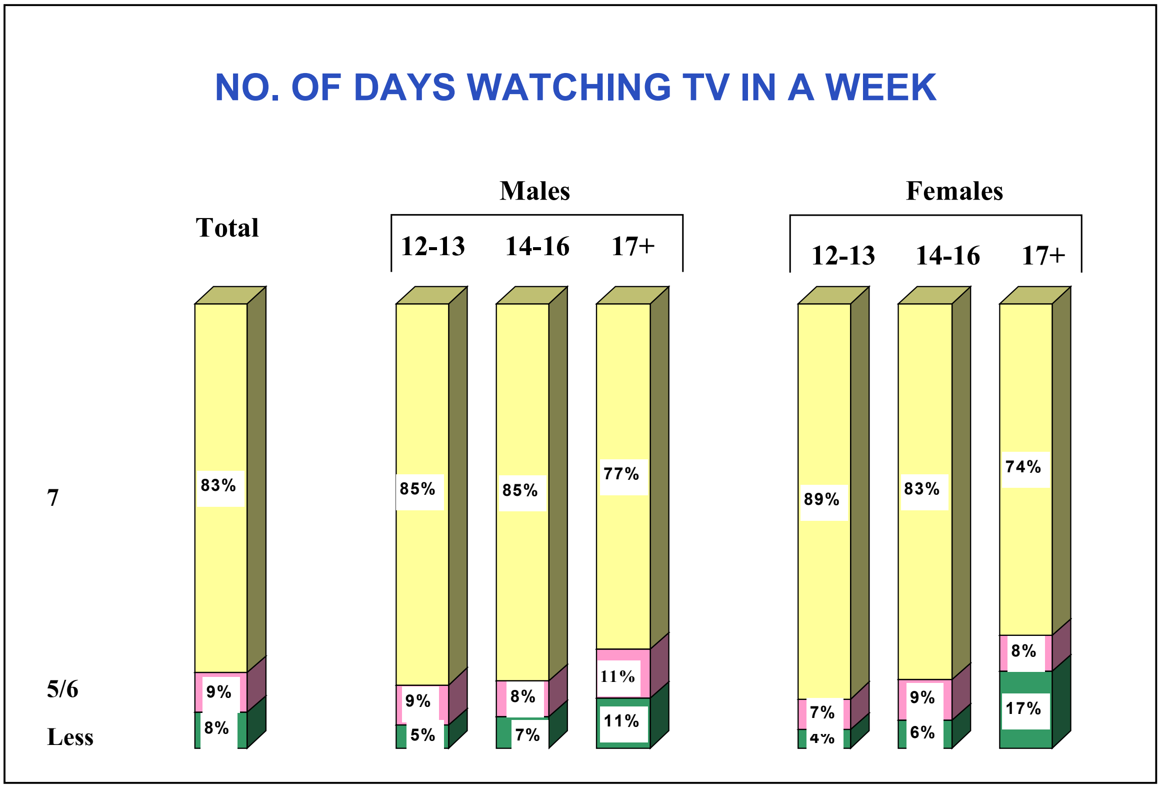
	TOTAL	MALES			FEMALES		
		12-13	14-16	17+	12-13	14-16	17+
	1200	170	278	152	167	278	155
	%	%	%	%	%	%	%
SUGAR	11	-	1	-	13	31	15
BLISS	11	2	1	2	17	27	12
SMASH HITS	7	5	2	2	23	10	3
SHOOT	6	12	15	8	1	-	-
J17	4	-	-	-	5	10	10
PLAYSTATION	3	9	5	5	-	-	1
TOP OF THE POPS	3	1	1	-	8	4	3
HELLO	2	-	-	2	1	1	8
T.V. HITS	2	1	1	2	3	3	-
OTHER	28	25	31	38	20	18	43
NOT STATED/NONE	31	41	44	47	23	14	18

Smash Hits is highly popular with young females but seems to lose its appeal very quickly. Sugar and Bliss seem to peak in terms of their appeal for females in the 14-16 age group while J17 and Hello tend to come into their own as females approach their late teens.

Shoot seems to be the most popular magazine overall with young males but it seems to lose its appeal after the age of 16.

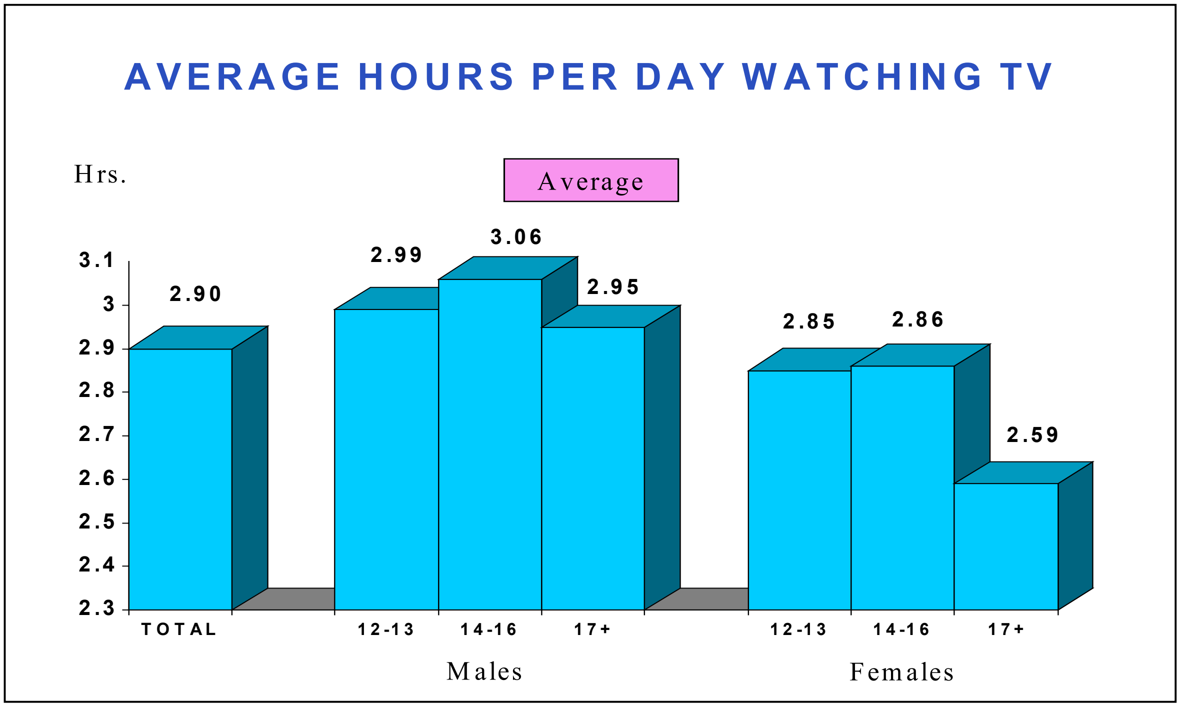
11.2 Television

It comes as no surprise to find that the bulk of teenagers are avid TV viewers

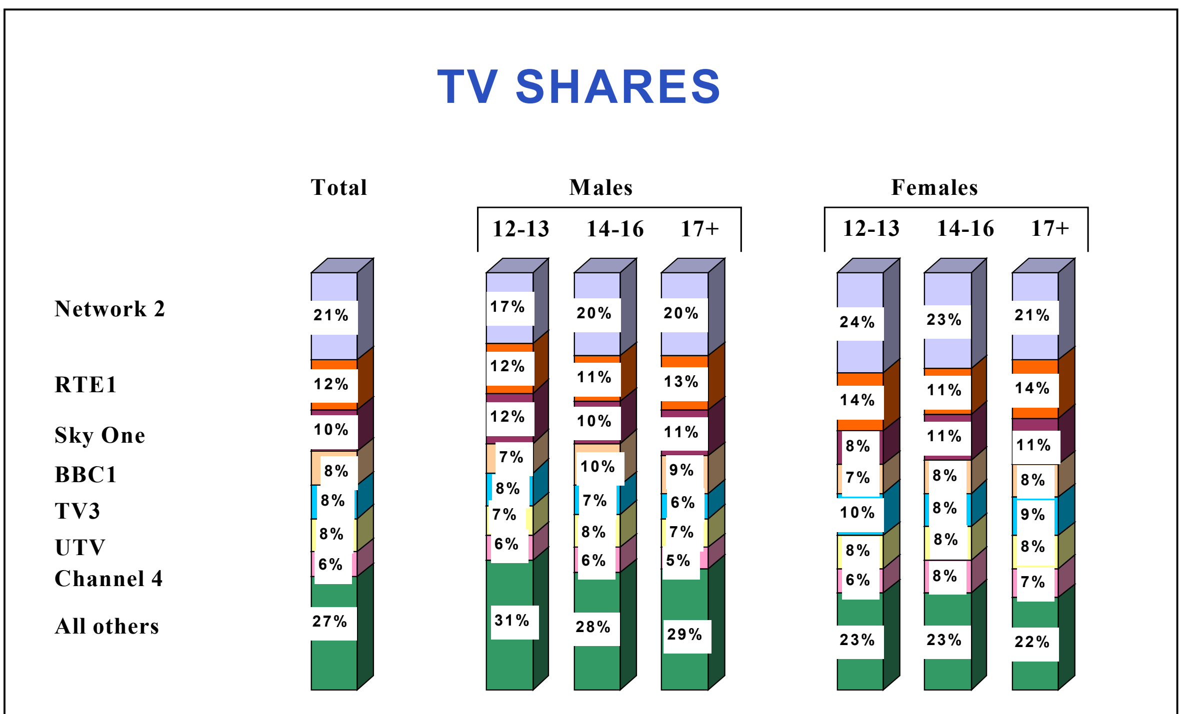


More than 80% of them watch TV seven days a week.

Among those who do watch, the average time spent viewing TV each day is close to three hours as can be seen here



Young males tend to be more intensive TV viewers than their female counterparts. Young people have quite a distinctive set of station preferences when watching TV, as is evident here



Inevitably, when it comes to television viewing, people watch certain programmes of their own volition, while others tend to be more a product of family decision making. We made an attempt in the survey to distinguish between these two types. Looking first at the programmes which young people specifically choose to watch themselves, the top ten are as follows:

TV PROGRAMMES WATCHED SPECIFICALLY (TOP 10)

		MALES			FEMALES		
	TOTAL 1200	12-13 170	14-16 278	17+ 152	12-13 167	14-16 278	17+ 155
	%	%	%	%	%	%	%
FRIENDS	79	72	73	67	89	88	85
THE SIMPSONS	66	76	69	59	70	63	55
FR. TED	59	70	68	61	57	50	48
HOME & AWAY	50	41	36	34	68	64	52
CORONATION STREET	46	31	26	32	68	63	60
TOP OF THE POPS	46	41	37	36	59	55	48
SOUTHPARK	45	56	47	42	40	48	33
ER	42	31	33	30	48	53	58
RUGRATS	34	41	24	16	50	42	32
EASTENDERS	31	19	18	20	41	46	43

At time of fieldwork, Friends, The Simpsons and Father Ted were the most popular choices overall. The main soaps, South Park, ER and Rugrats also feature in the top ten. As one might expect, there are significant differences by age and gender. All of the soaps tend to be more popular with females. ER is much more popular with females than males and really comes into its own as those females reach the upper end of the teenage spectrum.

The Simpsons is particularly popular with those at the youngest end of the spectrum (both male and female). Father Ted and South Park both appear to have something of a male bias in their viewing patterns.

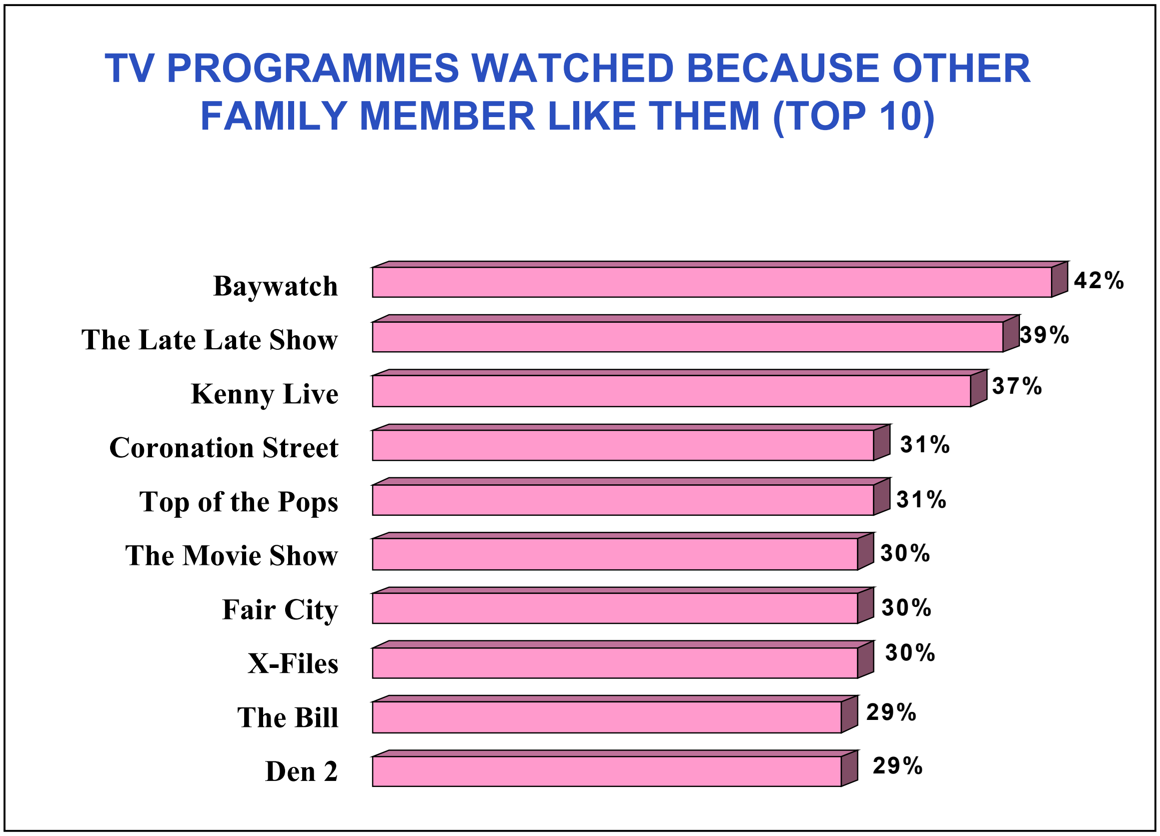
Similar biases are evident in some of the other popular programmes also

TV PROGRAMMES WATCHED SPECIFICALLY (11-20)

	TOTAL	MALES			FEMALES		
		12-13	14-16	17+	12-13	14-16	17+
	1200	170	278	152	167	278	155
	%	%	%	%	%	%	%
MATCH OF THE DAY	31	56	47	49	6	13	12
VERONICA'S CLOSET	30	24	20	14	43	42	35
MARRIED WITH CHILDREN	30	35	29	29	34	30	19
DON'T FEED THE GONDOLAS	29	28	34	38	16	27	33
THE PREMIERSHIP	29	55	47	42	6	12	11
ALLY MCBEAL	28	19	19	16	40	41	34
X-FILES	28	31	33	35	22	22	28
NEIGHBOURS	25	15	15	13	31	41	30
KING OF THE HILL	24	33	32	25	20	20	13
BEVERLY HILLS 90210	23	22	12	18	32	31	23

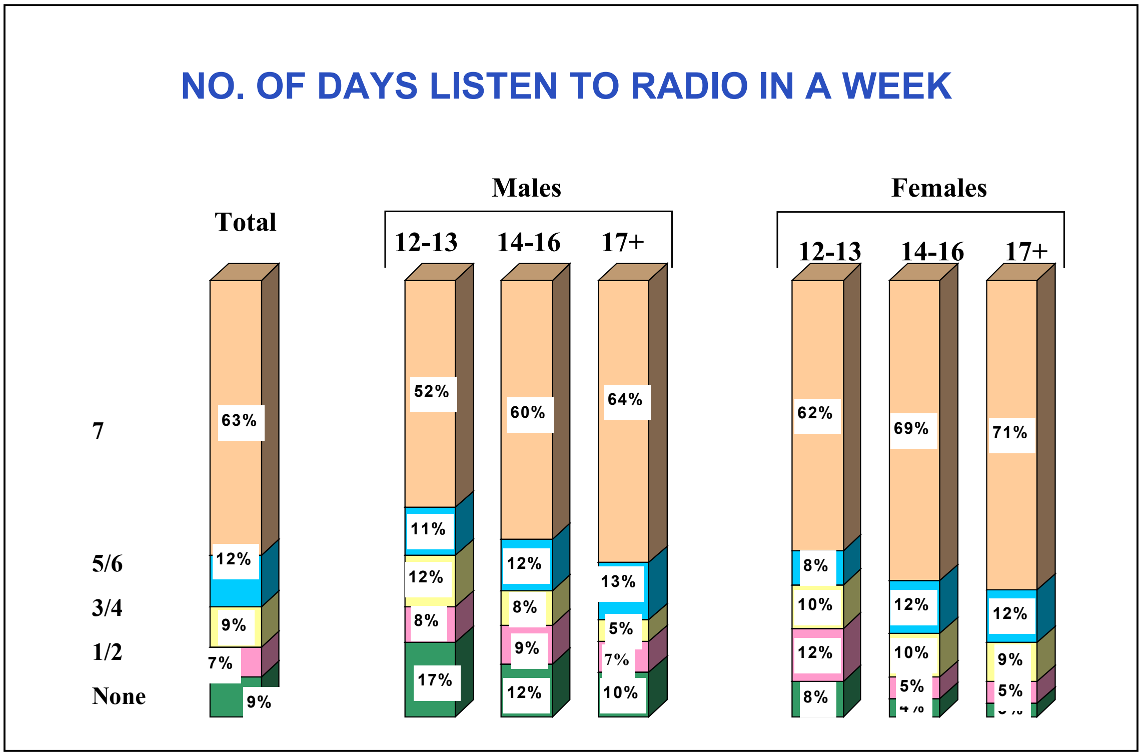
Veronica's Closet and Ally McBeal along with Neighbours and Beverly Hills 90210 are all significantly more popular with females while Match of the Day and The Premiership are not surprisingly more popular with males. The X-Files also seems to have something of a male bias along with King of the Hill.

The list of programmes that are watched because somebody else in the household chooses them is also rather interesting. The Top 10 under this heading are as follows:



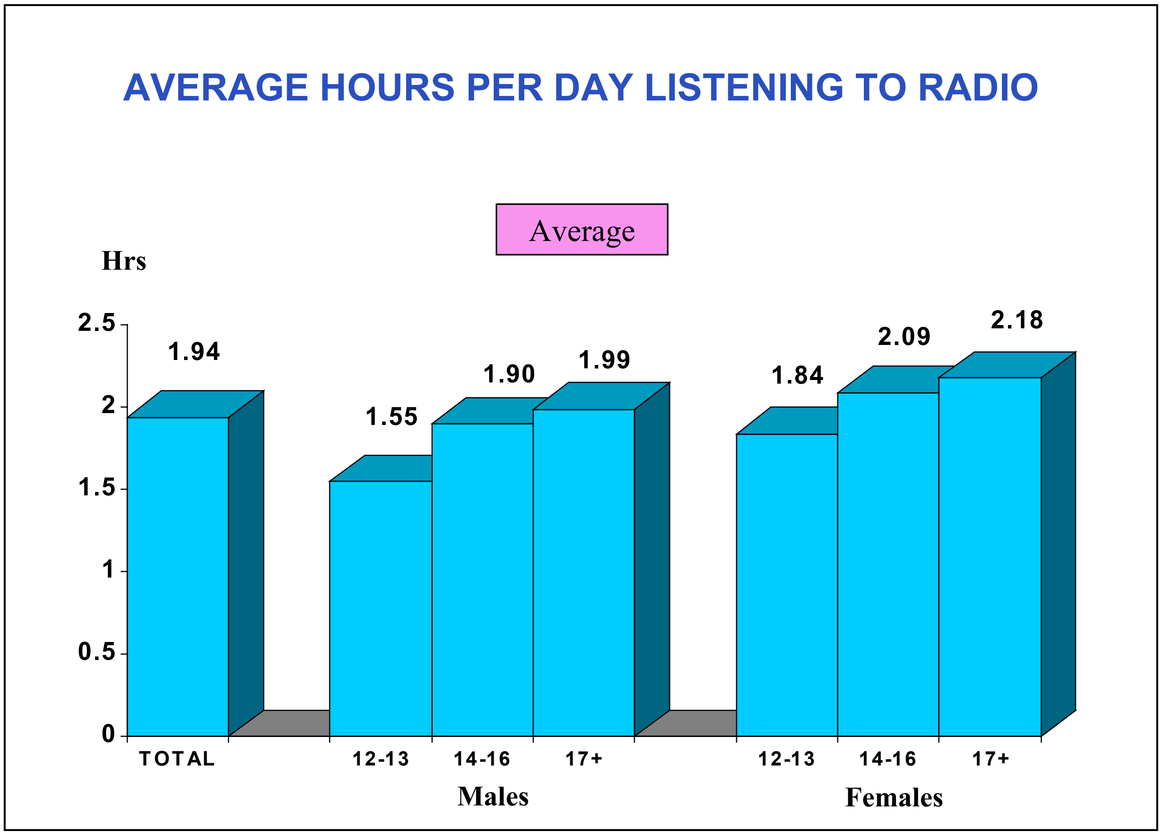
11.3 Radio Listening

It seems clear that young people are also avid radio listeners



Two-thirds of them listen every day and the intensity of listening seems to increase with age.

The typical young person listening to the radio will spend up to 2 hours listening on a typical day as is evident here:

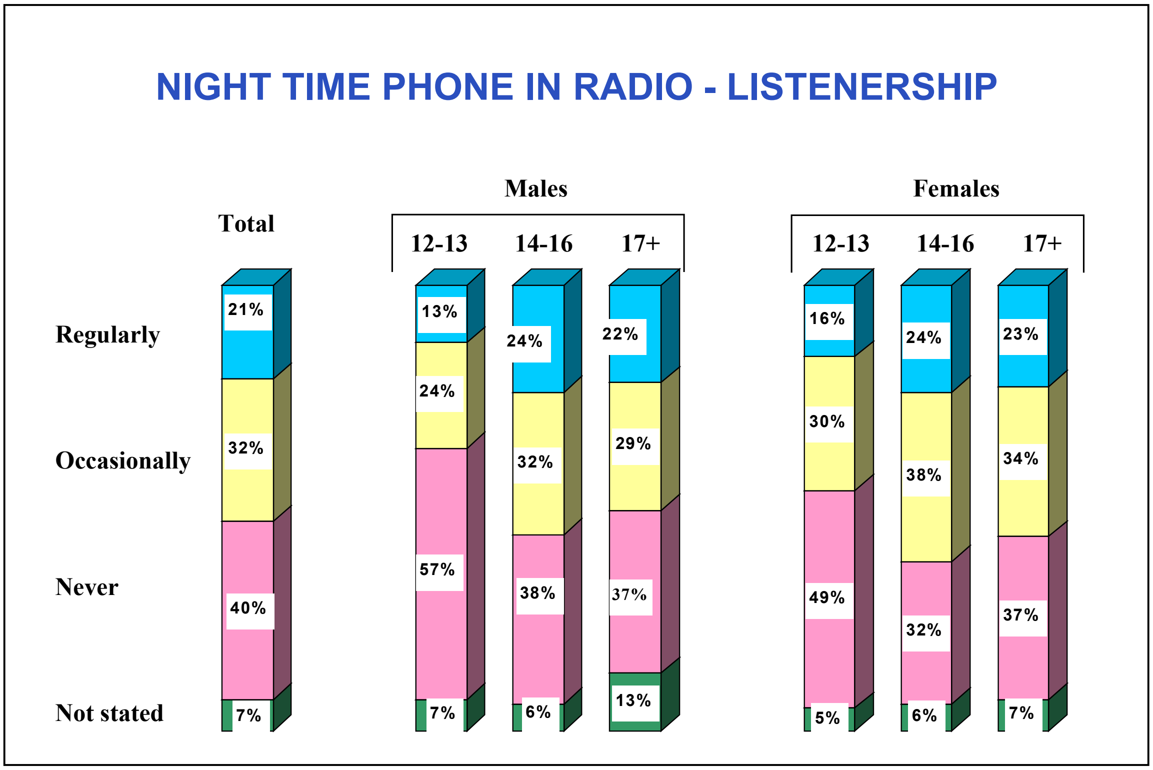


Here again the time spent listening tends to increase as teenagers move up the age scale. 2FM and FM104 seem to be by far the most popular stations overall with teenagers as is evident here:

RADIO STATION LISTENED TO MOST OFTEN

	TOTAL	MALES			FEMALES		
		12-13	14-16	17+	12-13	14-16	17+
	1104	143	247	139	154	271	150
	%	%	%	%	%	%	%
2 FM (RTE 2)	40	38	39	43	38	41	39
FM 104	19	15	23	18	18	19	15
ATLANTIC 252	10	16	9	6	15	9	6
ANY LOCAL STATION	10	10	10	9	12	11	9
ANY PIRATE STATION	6	7	5	8	3	4	8
98 FM	5	6	4	3	5	4	7
TODAY FM	3	1	3	6	-	3	7
CORK 96/103 FM	3	1	4	1	6	3	3
OTHER	0	-	0	1	-	0	1
NOT STATED/DK	4	3	2	5	3	4	4

Late night phone-in radio also seems to have developed a substantial audience among teenagers

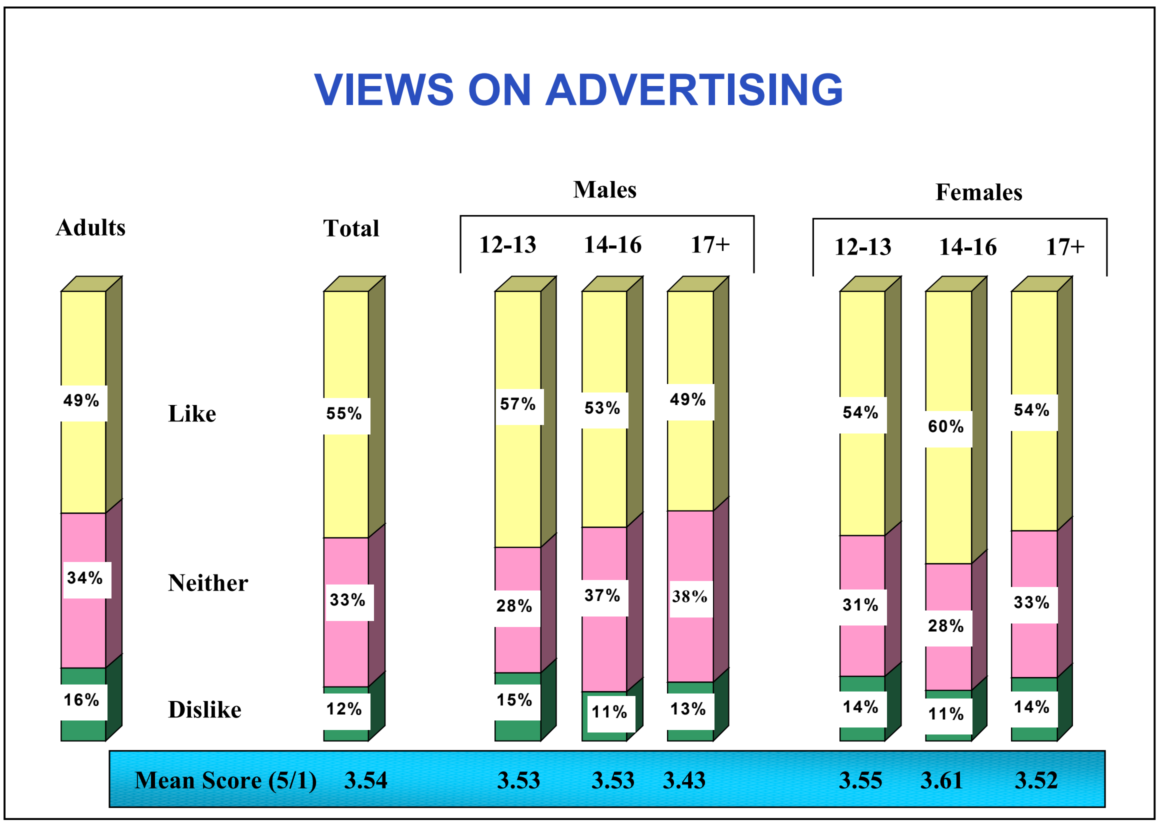


It is perhaps surprising to see that females are, if anything, more avid listeners to this type of radio than are males.

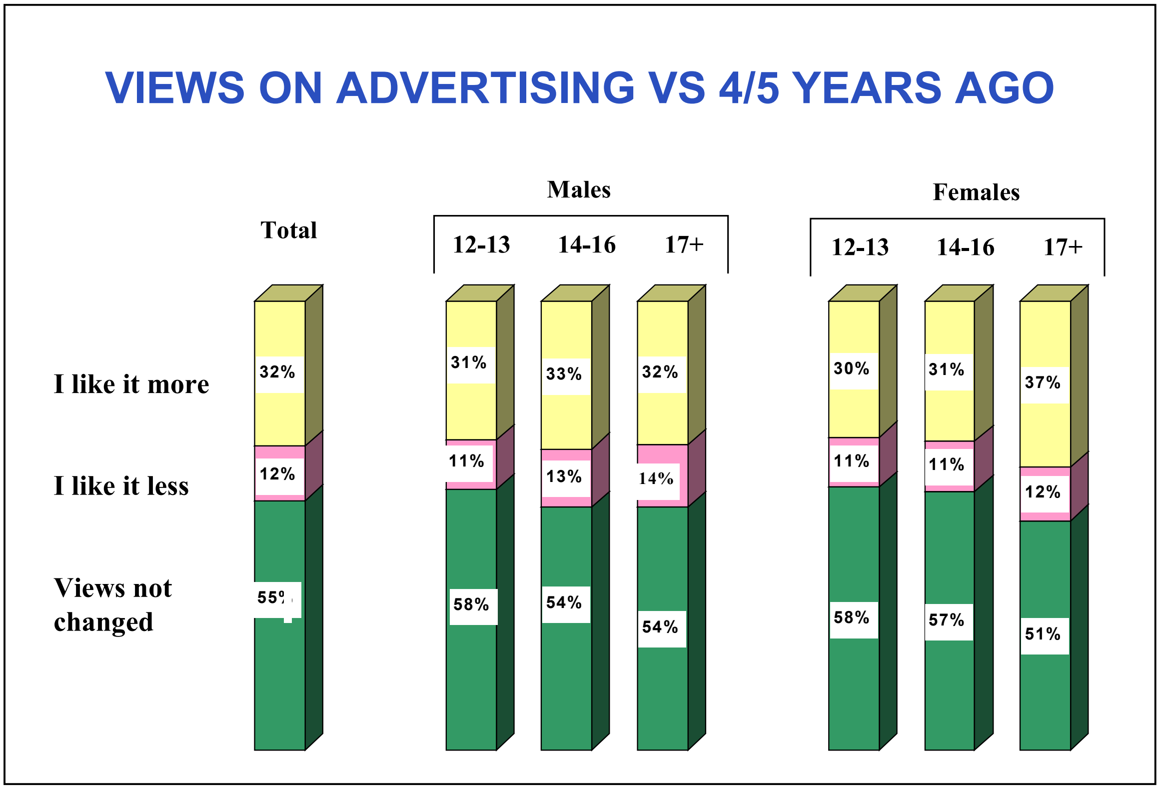
SECTION TWELVE
ATTITUDES TO ADVERTISING

12.1 Current perceptions

In the last adult lifestyle survey carried out for IAPI (in 1995) the evidence suggested that on balance, adults were more inclined to like than to dislike advertising. If anything teenagers have a more positive disposition as is evident here

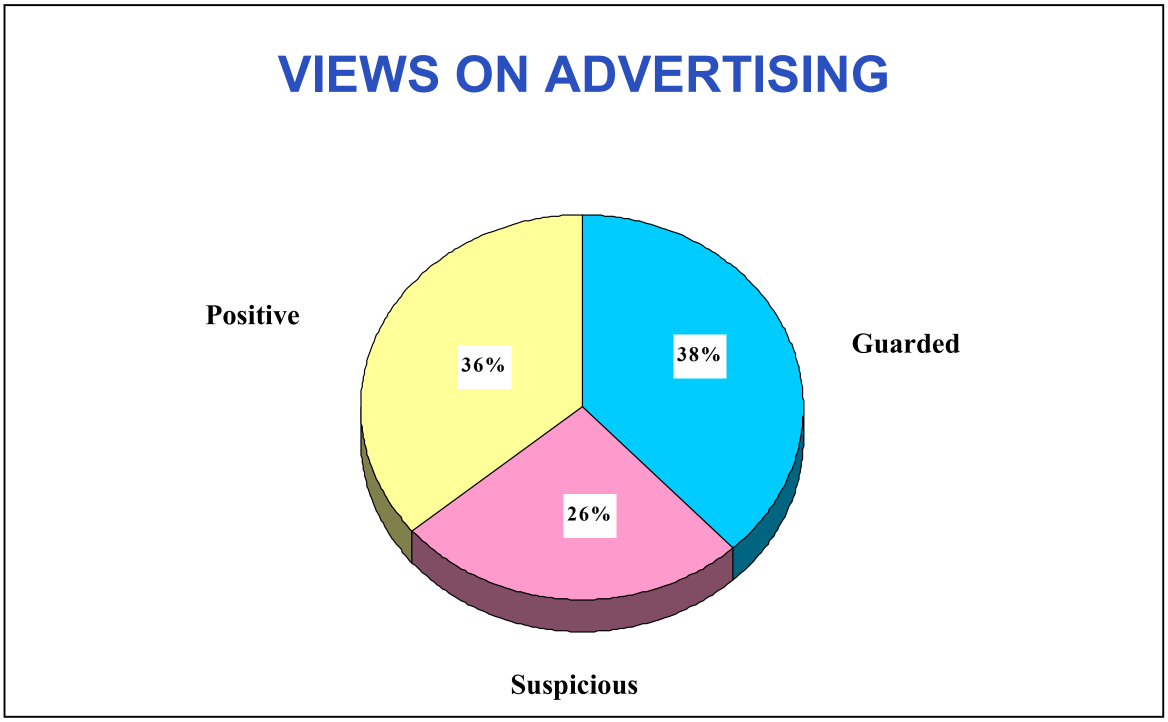


The majority of teenagers have not changed their attitudes towards advertising to any significant degree in recent years. Those who have are more likely to have moved in a positive than in a negative direction.



12.2 A certain caution evident

In the current study we wanted to examine peoples' attitudes towards advertising in rather more detail than had been done in the past. In order to do this, respondents were presented with a set of seven statements and they were asked whether they tended to agree or disagree with each one. On the basis of people's response patterns, it is possible to group teenagers as falling into one of three groups as summarised here:



The definitions of the three categories are evident from the following chart.

VIEW ON ADVERTISING
(% Agreeing with statement)

	TOTAL	SUSPICIOUS	GUARDED	POSITIVE
	1200	310	461	429
	%	%	%	%
I EXPECT ADVERTISING TO BE ENTERTAINING	79	32	96	96
MY CHOICES AND VIEWS ARE RARELY SWAYED BY ADVERTISING	60	57	81	40
I THINK A LOT OF ADVERTISING PATRONISES TEENAGERS	49	75	38	41
I RARELY NOTICE POSTER ADVERTISEMENTS	47	37	90	8
I THINK QUITE A LOT OF ADVERTISING IS DEVIOUS	44	67	36	35
VERY OFTEN I FIND TV ADS MORE ENTERTAINING THAN THE PROGRAMMES	38	13	30	63
NEARLY ALL ADVERTISING ANNOYS ME	20	30	22	10

It can be seen that those with the positive disposition expect ads to be entertaining and by and large they are not disappointed in this regard. Two-thirds of them claim that they very often find that TV ads are more entertaining than the programmes.

Those with a guarded disposition are equally inclined to expect advertising to be entertaining but they are less often satisfied in this regard. This group are also very inclined to feel that their views are rarely swayed by advertising and they tend to be rather dismissive of certain forms of advertising: claiming to never to notice posters, for example. Among the remaining group (those described as suspicious there are definitive concern expressed about the deviousness of advertising).