Scouts Australia
Youth Program Review

25 Nov 2014

Fellow Scouting members

The Youth Program Review is conducting a wide variety of research to ensure we develop the best possible youth program for our future youth members. This research requires feedback from our own members, members who have left Scouting, and the wider community to understand the perceptions and needs of both potential youth members and the parents of our prospective members. Furthermore, it requires a sound understanding of Australian society into the immediate future, including the changing needs and interests of young people.

Our research is a multi faceted approach using external demographers, our own teams, summarising previous research and working with other similar National Scout Organisations.

The following research, completed by McCrindle, is the third phase of a package of work designed to help us develop an understanding of the needs and desires of Australian society. This research explores the nature and interests of Generations Z and Alpha – our Scouting youth members and potential youth members for today and the immediate future.

Understanding the unique needs of generations is an area of expertise for McCrindle; we are very pleased to have had the opportunity to work with them in applying this expertise to the Scouting context in Australia. Please visit McCrindle's website to learn more about their work: mccrindle.com.au.

At times our research will challenge our thinking, garner support and generate angst and concern. Share your thoughts at ypr.scouts.com.au; through discussion great ideas can evolve. If the YPR isn't contentious then we aren't doing our job!

Please ensure you read page 2 of the report to understand the purpose of this research.

YPR team

SCOUTS AUSTRALIA

UNDERSTANDING THE FACTORS SHAPING THE WORLD OF GENERATION ALPHA AND GENERATION Z

PHASE 3 YPR SCOPING STUDY

NOVEMBER 2014

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FORECASTS • STRATEGY • RESEARCH

PHASE 3 YPR SCOPING STUDY

In August 2014, Scouts Australia commissioned McCrindle to undertake Phase 2 and Phase 3 of a contribution to the Youth Program Review research.

This Phase 3 Scoping Study is a collation of social research factors shaping the world of Gen Alpha (under 5) and Gen Z (5 to 19 year-olds) taking into account ABS data and McCrindle research trends analysis. In the larger context of the Phase 1 and Phase 2 YPR Research reports, this analysis highlights the cultural and situational context facing today's young people, outlining the key trends shaping Generation Zed and Generation Alpha relationally, emotionally, socially, spiritually, vocationally, educationally and financially. These areas closely reflect the core values of Scouts Australia and their identified areas of personal growth – social, physical, intellectual, character, emotional and spiritual development.

As an additional insight piece to the Phase 1 and Phase 2 research reports, this Scoping Study provides the context in which today's emerging generations are operating and a broad-based approach to the issues outlined in the YPR research questions.

INTRODUCING GEN Z AND GEN ALPHA

Those who belong to Generation Zed were born from 1995 to 2009 and are currently aged between 5 and 19 years of age. There are 4.43 million Gen Zeds in Australia, who make up 19% of the national population and whilst they comprise just 6% of the workforce today, they will make up 27% of the workforce by 2025. Generation Alpha are the newest and youngest generation in Australia, those born since 2010 and currently aged under 5. In 2014 there were already 1.6 million Gen Alphas in Australia, which is 7% of the national population. Australia is in its largest baby boom since the post-war period and with more than 300,000 births taking place each year, Gen Alpha will soon be the next large cohort of school students. This demographic growth highlights a unique opportunity for Scouts Australia to proactively engage with this next generation.
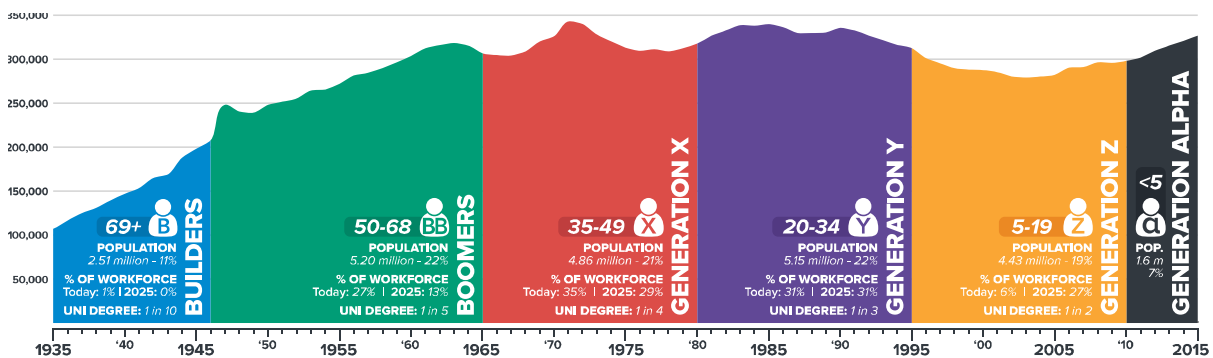
Today's children and youth are growing up in an era of incredible change. Whether it be demographics, technology, society, education or the economy, there are transformations continually occurring in every area.

Only occasionally in history do massive
demographic shifts
combine with huge
social change
and ongoing
generational transitions
and rapid
technological trends
so that within the span of a few decades,
society altogether alters

*Today we are living in the midst of one such transformation*

RELATIONAL

Raising Screenagers

Today's emerging generations; Gen Z and Gen Alpha, are growing up in a world of unprecedented technological change. While many of the Baby Boomers own smartphones and use apps, the way they use new technologies is more sequential, structural, linear and practical than the younger generations. The over 40's can be described as digital transactors, using the latest tools to transact, as with any tool, and after the function is performed, putting it back down or replacing an older tool with a newer, more functional one. However the Under 30's, having been shaped in a digital, wireless, online world, have embedded these tools more into their lifestyles. The technologies are seamlessly integrated into their lives. They are the **digital integrators.**

In their lifetimes, today's youth and children have witnessed a technology boom that has redefined the way people relate and communicate. With the development and expansion of the internet has come the introduction of social media and content sharing, which are being progressively integrated into everyday life.

When the oldest Gen Zeds were 2 years of age in 1997, Google.com was registered as a domain, and when they turned 5, USB flash drives were new on the market. The first Gen Alphas were born as the first Apple iPad was launched. They celebrated their first birthdays with the advent of Instagram, and as they turned 2 years of age, Facebook hit 1 billion active users. The only phones that Gen Alphas have ever seen also take photos, record videos, access the internet, run games and have just one button.
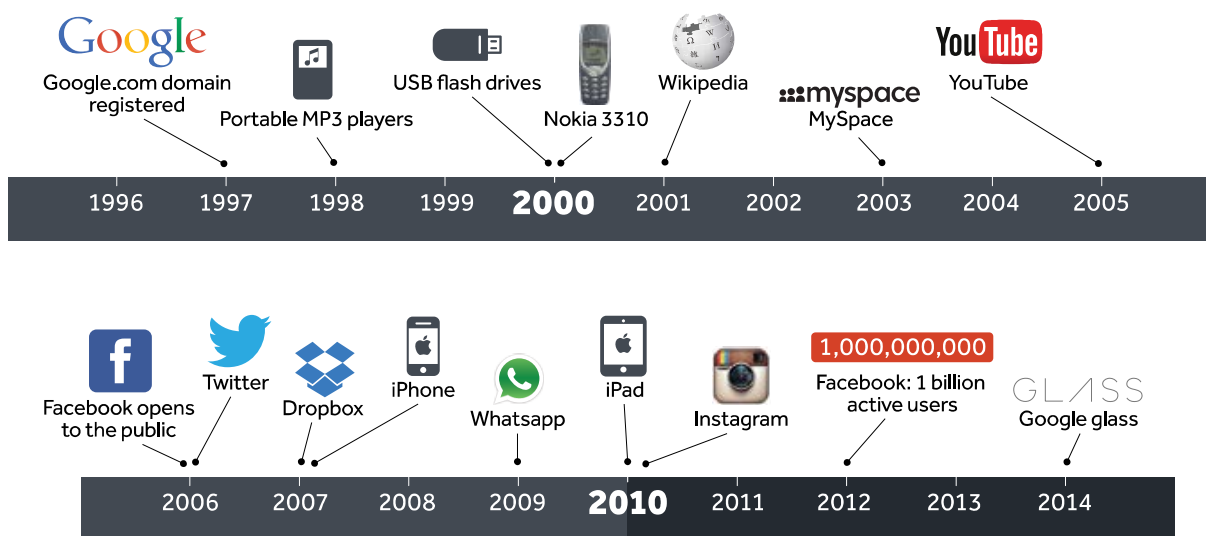
Generation Z are content creators who are constantly utilising new technologies and integrating them into daily life. This can include making and uploading videos to YouTube, curating blogs, posting on social media, commenting in forums, or contributing to Wikipedia articles.

Our preschool and kindergarten generation of today, Generation Alpha are also being shaped by the changing world they have been born into, and many are already able to navigate tablets and smartphones with intuitive ease.

The far-reaching impacts of technology on the everyday lives of young people also have implications for their parents, who are required to navigate a range of complexities that these new forms of communication and content creation present. Parents' ability to set parameters on their children's technology use is limited when young people are saturated by media and there are often a number of devices accessible to them. Similarly, the ubiquity of technology makes monitoring children's safety online a particular concern. Keeping pace with the rate of technological change may also be difficult for parents.

With young people spending more time on screens than ever before, averaging 10 hours and 19 minutes of screen time per day, Scouting provides a truly counter-cultural offer in its kinaesthetic, practical, and hands-on programs. While this type of face-to-face activity is what parents and young people are increasingly looking for – presenting significant opportunities for Scouts Australia – Scouting also faces the challenge of marketing and communicating its offerings to young people in methods that will best engage them.

Restructured Households

In Australia, more people are cohabitating than ever before. In 1990, 1 in 2 Australians (48%) lived together prior to registered marriage. Twenty years on, this figure had risen to 4 in 5 Australians (79%).[1] Brides and grooms are getting older, with the median marriage age for males sitting at 31.4 years and 29.4 years for females.[2] Not only that, but Australian parents are also getting older. The median age of mothers (giving birth)

The avg male marries at
31.4

avg female marries at
29.4

Almost
4/5
of couples live together before marriage
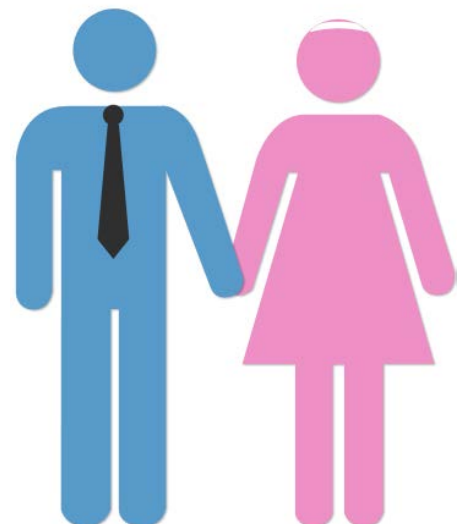
[1] Australian Bureau of Statistics, 4102.0 - Australian Social Trends, March Quarter 2012.
[2] Australian Bureau of Statistics, 3310.0 - Marriages and Divorces, Australia, 2012.

has risen from 28.7 years in 1992 to 30.7 years in 2012. The median age of fathers (new births) has also risen, from 31.2 years in 1992 to 33 years in 2012.[3]

With the increase in the average age of traditional milestones and the decline of the nuclear household structure, we are often seeing three generations living under one roof: Baby Boomers are being sandwiched by taking care of their own parents (the Builders), while still having their Gen Y children living with them, delaying their move out of the family home predominately to pursue studies. This is one example of how the younger generations are delaying traditional adult milestones, which may be important for Scouts Australia to consider in its programs for young adults up to the age of 25 who are presented with more options for further education and careers both locally and globally than ever before.

Household size has also been declining for the last 100 years. In 1911, the average household size for Australia was 4.5. By 2006, it had fallen to 2.53. But by 2011, something remarkable had happened – household size increased but only enough to raise it to the current figure of 2.6 people per household. The multi-gen household and boomerang kids have turned around a 100-year trend and created expanding household size.

One in three (33%) Australian households consist of a nuclear family, that is, a couple living with children. This is followed closely by couple-only households at 30%. Almost 1 in 4 (23%) households are comprised of only one person, and 1 in 10 (11%) are single parent families. Taken alongside the changes in household structures, it is evident that the way families relate is dynamic and complex.

33%	30%	23%	11%	3%
Couple & kids	Couple only	Lone person	Single parent	Group living
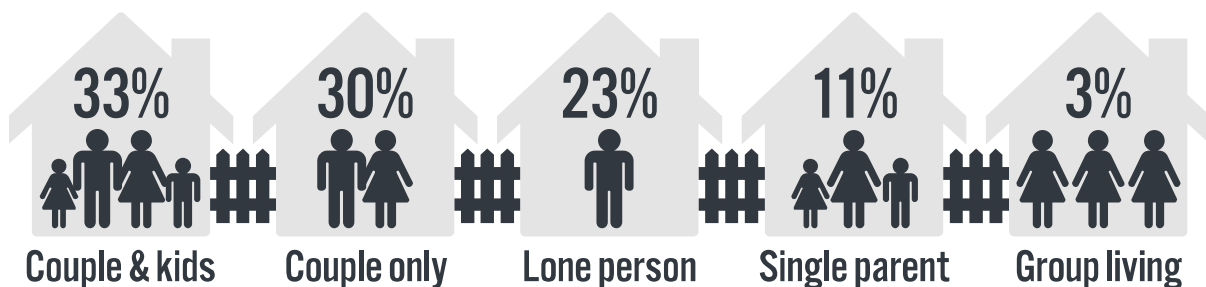
Redefined Life Stages

Gen Z and Gen Alpha are post-life stage. Where once childhood transitioned into teenagehood and then adulthood, the 21st century has seen a delay in this transitioning through emerging life stages. Today children become tweens, then teens, then KIPPERS (kids in parents' pockets eroding retirement savings), then adults, then finally career changers and downagers, two stages redefining how we see retirement. These life stages do not correlate with defined ages but are fluid markers that shift and change along with cultural shifts and trends.

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[3] Australian Bureau of Statistics, 3301.0 - Births, Australia, 2012.

Tweens are those aged 8 to 12, "in-between" childhood and adolescence. They are currently the children of Generation X and have emerged as their own demographic now recognised as brand influencers, a consumer segment and a target market.

20th CENTURY	CHILDHOOD	TEENAGER		ADULTHOOD			
TODAY	CHILDHOOD	TWEEN	TEENAGER	YOUNG ADULT	KIPPERS	ADULTHOOD	CAREER-CHANGER	DOWNAGER

In the past, tween girls have been the predominant focus for media and marketers. However, we are now seeing an array of products targeting tween boys. Despite their lack of income, Australian tweens are a one billion dollar consumer force: the average 8 year-old receives $10.68 in pocket money a week, increasing to $21.36 for the average 12 year-old.

Social media has been integral to the development of tween identity. Many tweens are actively engaging on sites, uploading their own YouTube videos and connecting with friends on platforms such as Facebook, Kik and Snapchat. Many websites are targeted specifically at this demographic. Tweens can create virtual pets, play dress-ups, and interact with other people their age online.

Tweens are greatly influenced by celebrities. The Olsen twins were pioneers in catering for tweens. Since then, personalities including Taylor Swift and Justin Bieber have developed sophisticated methods of connecting with tweens, hosting their own e-stores that sell fashion and cosmetic items to this age group. The relatively new world of 'tweendom' is evidence of the up-ageing of today's emerging generations. These young people have access to more technology, information, and external influences than any generation before them.

Perhaps one of the significant implications facing tweens who grow up in an increasingly sophisticated world with more technology, social media, consumerism, and fashion influences are that there are areas in this age bracket such as creativity, practical skill development, and relational community that are less developed. This presents a unique opportunity for Scouts Australia to be recognised as offering these essential and enriching skills through its programs.

Tween Fast Facts

- Numbers of 8-12 year olds: 1,387,130 (larger than the city of Adelaide [1.2m])
- Number of 6-12 year olds: 1,949,443 (more people than the state of South Australia [1.67m])
- Today's tweens – Gen Z, are the children of Gen X.
- They are the first generation who are wholly born and raised in the 21st Century.
- They are the most global connected, tech savvy, materially endowed, and formally educated generation ever.
- Pocket Money $10.68 - $21.36 per week which equates to a total of $1.08 billion for Australian tweens per year.

EMOTIONAL

Resilience

In an era of updates, upgrades and transitory trends, there is a need for younger generations to learn to develop resilience as they confront a myriad of novel challenges and influences. It is often more convenient to outsource tasks and replace possessions, meaning that skills, like changing a tyre or fixing a tap, are no longer commonplace. The sense of transience that pervades even the most everyday tasks and objects also carries through to more significant areas. The average Gen Z will have 17 jobs, 5 careers and live in 15 homes in a lifetime. There is obvious scope for equipping Gen Z and Gen Alpha with tools to develop emotional resilience.

17 JOBS 5 CAREERS 15 HOMES
IN A LIFETIME

Contentment

With changes constantly taking place in careers, technology, family life and households, it can be difficult for younger generations to feel a sense of contentment in life. While almost 1 in 3 (29%) of Australians believe they are happier than average, more than half the population report marginal levels of happiness and 17% believe they are less happy than average.

For the emerging generations, a prevailing drive towards the 'next thing' may emotionally limit their ability to achieve a greater level of life satisfaction. Mental health is an increasing concern among young people, and Mission Australia's Mental Health Report 2014 indicates that just over 1 in 5 15-19 year-olds (21%) meet the criteria for a probable serious mental illness. For young people, dealing with stress, school or study problems and body image are the top 3 issues of concern.

Life skills

On average Gen Z will live longer, stay in education later, and work across more careers than any prior generation. They are the most materially supplied, technologically saturated, globally connected and formally educated generation ever.

In the nearly 14 years of their lifespan they have seen more change than any cohort before them. They began life when Australia's birth rate was declining and soon hit its lowest ebb in history, yet are now part of record annual births that exceed 300,000 per year. They began their life in the internet era but are being shaped in the world of social media. While the PC era dominated their birth years, it is mobile devices that are shaping today. Their lexicons are filled with terms that did not exist at their birth: apps, tweets, tablets, status updates and cloud computing.

Only occasionally does massive demographic change collide with huge technological growth, and significant social change, yet this is exactly what Generation Z has experienced. The confluence of these trends has so transformed their society that it is radically different to the times that shaped their parents and unrecognizable to the world their grandparents first knew. Though there is an evident decline in traditional practical skills, there is a surge in high tech skills to keep up with the ever-advancing technology.

Despite all this change, life skills remain important. The ability to communicate, socialise and learn to live and work with other people is essential. While technical skills are second-nature for today's digital integrators, the teaching of life-skills is increasingly on-demand in schools and among educational and youth programs. This is especially true as parents face growing work and life pressures and are increasingly looking to partner with schools and other community organisations to provide holistic development of their children through life skills, which Scouts Australia is perfectly positioned for.

SOCIAL

Real world relational

With the growth of technology and globalisation, the younger generations are engaged in popular culture, entertainment, fashion, celebrities and trends that are often not regional or even national, but global. Not only that, but the time it now takes for an event, trend or even viral video to have an impact on an international scale is unparalleled. Take, for instance, South Korean pop artist Psy's hit song and music video 'Gangnam Style', which in 2012 took only 51 days to reach 100 million views across the world, almost 5 times Australia's population. The influences, values, social trends and key issues of today as Gen Zeds and Alphas grow up are also distinctly global.

Social relationships are timeless and integral to the formation of community. They have a bearing on our behaviours, attitudes and emotions. New social media has expanded and altered the way we relate, and has made the world seem much smaller. Connecting with others online is quick and simple, but is not without drawbacks. Online interaction can deprive us of 'real-world' connections, supporting a breadth of interactions while lacking depth of communication.

In contrast to traditional identity markers of culture, gender and place, our online social identities are defined by our lifestyle choices and media consumption. We are able to interact with people irrespective of location. However, Australians are now responding to our reliance on our online social world, seeking more real-world interactions. Online technology is increasingly used as a tool to facilitate these relationships.

New technologies are responding to our desire for real-world connection by 'augmenting reality'. The barriers between the online and the real-world are breaking down. Shops are encouraging consumers to interact via social media on their smartphones while in-store. Interaction by users can 'enhance' advertisements and encourage participation. These new technologies connect the limitless online realm with our tangible, every-day lives.

YouTube, Twitter, Facebook and the like are enabling a new kind of activism, where information can be spread to an entire movement of people by simply posting a status or uploading a video. Emerging generations have been socially networking since their pre-teens, from instant messaging, to Instagram, Facebook, and Twitter. Smartphones have added further flexibility, so that these generations are constantly connecting with current trends and issues. Online social media allows for greater breadth of connection, used as a tool to assist our deeper 'real-world' interactions. This has significant potential to impact and shape the way in which young people connect to one another through Scouting and increase the likelihood for them to want to connect with like-minded individuals in other parts of the world participating in the global Scouting movement. It also highlights the significant need for Scouts Australia to have a growing online presence which fosters the offline relational community. Online communities create a platform in which the conversations that happen offline can be continued. It's no longer an "either-or" option for organisations – online communities have become a necessity for organisations to remain relevant.

In spite of the unprecedented rates of change happening across a variety of areas, there are some things that remain integral to our social experiences and preferences as human beings, regardless of generation. While younger generations have more friends on Facebook than their older counterparts, it is interesting to note that all generations have the same number of close friends, averaging 13. Clearly, an inherent need for strong social relationships remains, even in this new era of online connection.

That said, there are particular social factors that are influencing the younger generations. The peer pressure that is placed on the younger Gen Zeds, and soon the Gen Alphas, to conform to the latest trends is perhaps one of the strongest there has been. In fact, Generation Z is the most marketed-to generation ever, exposed to somewhere between 30,000 and 40,000 advertisements in a year. The implications of this are that in a world of information saturation and fatigue it is increasingly complex for organisations such as Scouts Australia to get cut-through and gain relevance in the world of young people who are exposed to countless options, offers, and activities they can be involved with.

Today, there are also a range of more positive social influences that are shaping the world for the emerging generations. A host of creative projects and innovations have gained mass support through platforms like Kickstarter and Pozible and mass campaigns on social issues are made accessible through initiatives such as Change.org. These are just some examples of how community is being mobilised and individuals are collaborating through global online networks to get behind causes. This presents possible opportunities for Scouts Australia to consider campaigns for change or fundraising initiatives championing the cause of young people getting active and outdoors which could take place on these collaborative online community platforms.

Experts to Peer Groups

Wherever they are in the world Gen Zeds are logged-on and linked-up. From Sydney to Shanghai, Melbourne to Madras, they are influenced by the same movies, music, fashions and food. In this wireless world their technology knows no boundaries and nor do their blogs, chat rooms, friendships and vocabulary. In such an environment of connectedness and globalisation now more than ever, everyone is entitled to an opinion. Where in times past opinions may have been left behind closed doors, now behind each of those doors is some form of device linked to the internet. With 96% of Australian households connected to the internet, there is instant opportunity to have a voice. In a world of many voices Gen Z and Alpha are steering away from their reliance on experts and seeking more peer groups and the opinions of others. Scouts Australia has the opportunity to mobilise their young members to be active in online networks, sharing their voice on the things they enjoy and value about the Scouting program.

For today's young people, Wikipedia, created by the online web-community, is more widely accessed than the Encyclopaedia Britannica compiled by academics. Ironically, today an electronic document is perceived to have more currency (and therefore accuracy) than the printed page. This observation epitomises the move away from valuing purely authorities and experts, to placing value in the collective opinions and ideas.

The ubiquitous nature of these online platforms also highlights that organisations like Scouts Australia cannot afford to ignore having a strong online community and online presence. Scouts Australia should seek to create opportunities for members to actively engage in communicating the offline activities within Scouting within online forums, such as capturing a short video of a Scouting adventure on YouTube and promoting it through social media channels.

Big Australia: Growing, Ageing, Changing, Moving

Growing population

Australia is the fastest growing nation in the OECD, growing at 1.7% annually which is faster than the world growth rate of 1.1% and the OECD average of 0.6%.

1.7%
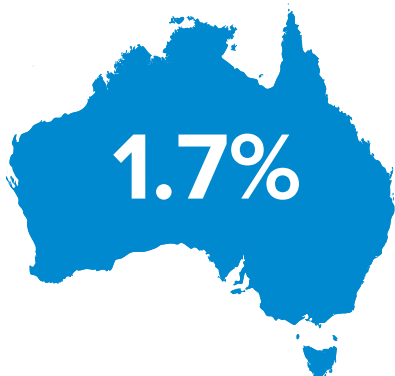
Since 1966 we have more than doubled our national population, growing from 11.5 million to almost 24 million, and in the same period of time, the global population has doubled from 3.5 billion to 7.2 billion people. 40% of Australia's growth is attributed to natural increase (births minus deaths), and 60% from net overseas migration. Australia is currently experiencing a baby boom and setting new birth records, with births now exceeding 300,000 per year.

Ageing Population

As well as experiencing a baby boom, Australia is also ageing, as Australia's Population Pyramids show. By 2044 the Population Pyramid will become inverted with the number of over 60s outnumbering the under 18s for the first time.

We are on the brink of the greatest intergenerational transition in history as the Baby Boomer generation, born 1946-1964 in the post-war baby boom, are now reaching retirement age. These Baby Boomers make up 27% of the workforce today but will be just 13% of the workforce by 2025. As this generation enters retirement, the demand for services in this sector is going to expand significantly. The over 65s are growing at a faster rate than Australia as a whole. Making up 14.7% of our population today, this will grow to 16.8% of our population by 2024. By 2044, 1 in 5 Australians (20%) will be aged over 65.
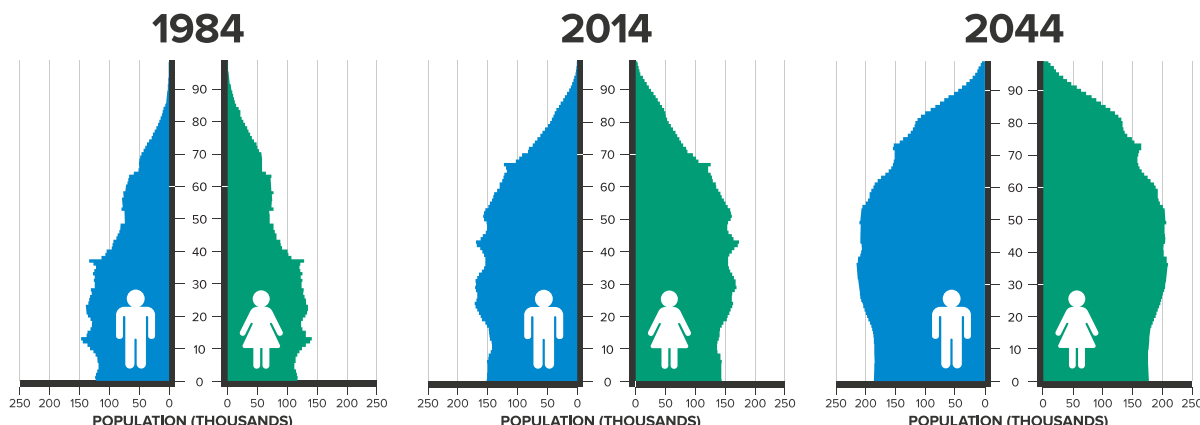
As Baby Boomers who hold many of the leadership roles in organisations like Scouts Australia are reaching retirement, there will be a need for succession planning to hand the baton on to the younger generations. As these young leaders emerge, they are likely to bring new

approaches to leadership and management and will be far more likely to respond to and promote collaborative and empowering styles of leadership rather than traditional hierarchical and positional-based leadership models.

20th-century leadership — command and control
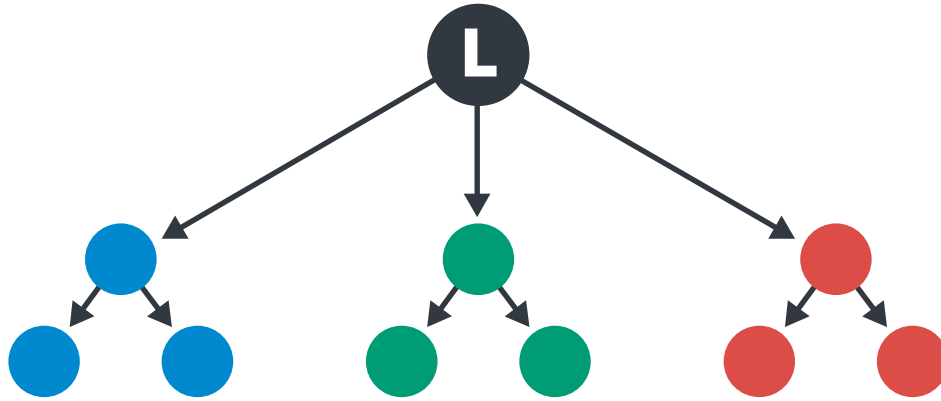
21st-century leadership — collaboration and cooperation
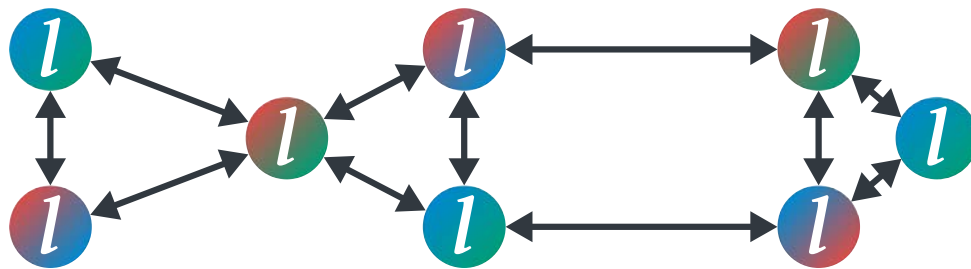
As health outcomes improve, life expectancy at birth has increased and is projected to continue to rise, resulting in further population growth for those aged over 85 years.

1984	75.8
TODAY	82.1
2044	90.4
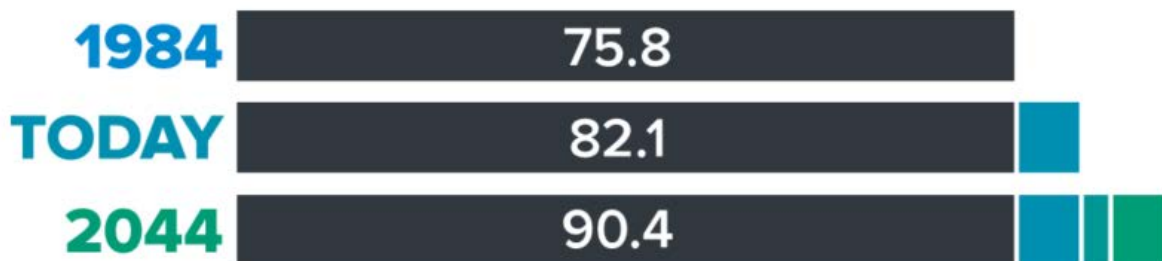
The ageing population will place greater demands for productivity on the labour force. In 1970, for every retired couple there were 15 people in the workforce. In 2010, for every 2

people of retired age there were 10 in workforce. It is predicted that in 2050, for every retired couple there will be just 5 in workforce. This will dramatically affect the emerging generations as they find ways to navigate issues surrounding the aging workforce. Scouting members will be entering the workforce in times where there will be a greater demand for productivity from the labour force. Therefore, the ability to innovate and find creative solutions will be required more than ever before and the value of offline skills such as relational and problem solving skills — which Scouts instils — will be increasingly valuable in the workforce in the years ahead.

1970   PER

2010   PER

2050   PER

Changing

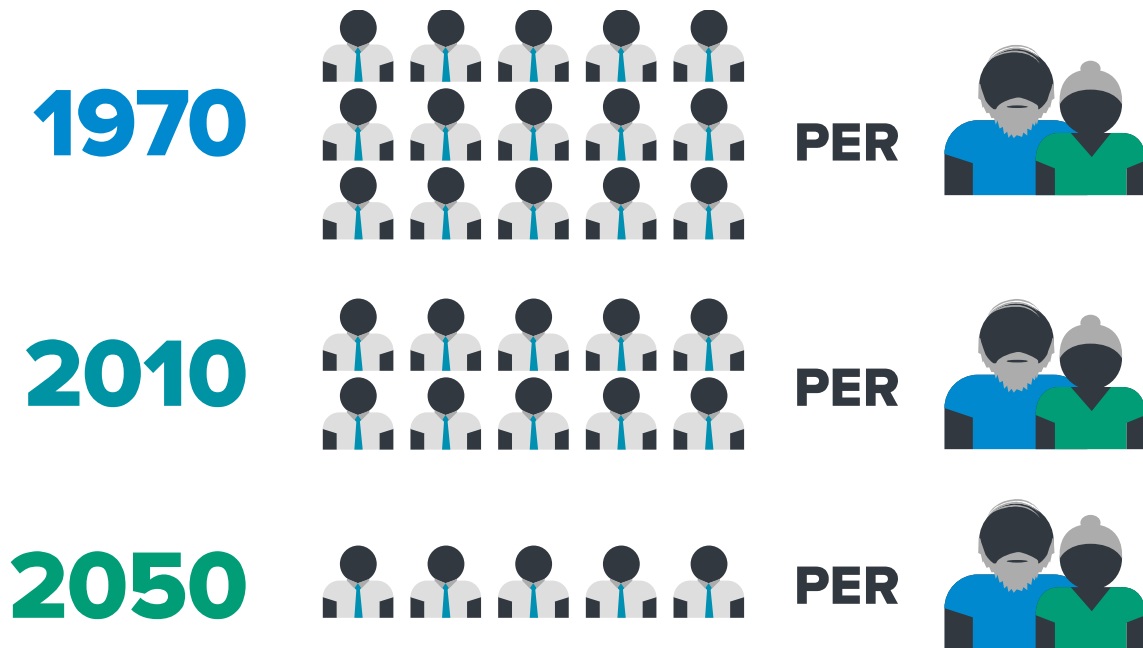Almost 3 in 10 Australian residents (28%) were born overseas. This equates to 6.4 million people.[4] In fact, Australia shows continually high rates of migration, with net overseas migration contributing 60% of Australia's population growth.[5]

As a result, Australia enjoys rich ethnic and cultural diversity, with people hailing from a broad spread of nations. While about 1 in 5 of Australia's migrants were born in the United Kingdom, the top source country for recent arrivals is India, followed by the UK, China, New Zealand, the Philippines, South Africa and Malaysia.[6] Gen Alphas are being born into an increasingly multi-ethnic multicultural society, where 46% of all Australians have one or both parents born overseas. For Scouts Australia to more effectively engage with an increasingly culturally diverse population, the integration of activities and programs connected to various cultural groups and activities could be a strong asset.

[4] Australian Bureau of Statistics, 3412.0 - Migration, Australia, 2011-12 and 2012-13.
[5] Australian Bureau of Statistics, 3101.0 - Australian Demographic Statistics, Dec 2013.
[6] Australian Bureau of Statistics, 2071.0 - Reflecting a Nation: Stories from the 2011 Census, 2012–2013.

Moving

There is no doubt that Gen Zeds and Alphas are mobile. Not only are these generations expected to hold an average of 17 jobs and 5 careers in their lifetime, but Gen Zs are also expected to live in an average of 15 places over their lifetime. Currently 1 in 3 Australians are renting while the remaining 2 in 3 are either paying off their mortgage or fully own their home. Those who rent stay in the same place for an average of 1.8 years and those paying off their mortgage on average stay for 8 years. Overall the current trends in housing shows a departing from the great Australian dream to own your own home. The trend for high levels of churn and change in our communities has the potential to disrupt the continuity of attendees in Scouting programs and shows the need to have a way to more quickly connect with people who have moved into local areas.

	Mortgage	Fully own	Renting
HOME OWNERSHIP	36%	33%	31%
avg. length tenure	8yrs	18yrs	1.8yrs
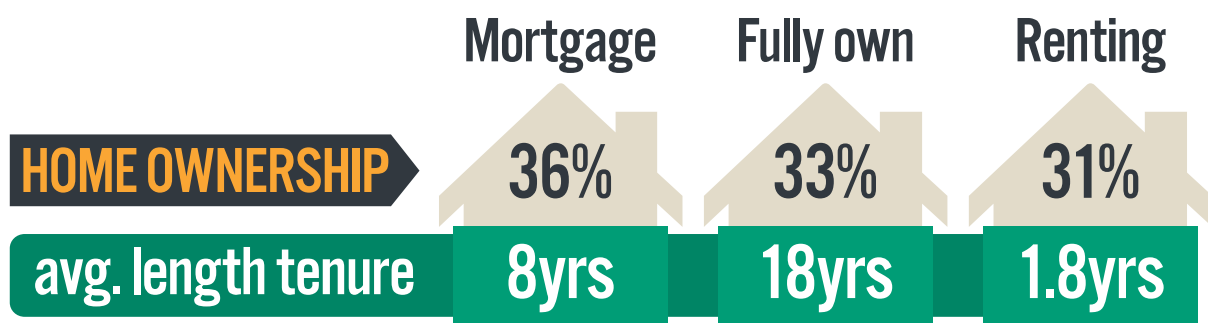
SPIRITUAL

Superficiality to Substance

In today's society we see a paradox of desires. On the one hand there is a cry for substance to life, purpose and the need to belong to something bigger than ourselves. On the other hand is an emerging superficiality as Gen Zed and Alpha are surrounded by technologies and defined in a self-monitored online presence. Despite the superficial discourse strongly present in the media and marketing towards the emerging generations, there is a longing among young people to be actively involved in causes and activities that allow them to participate in a purpose which is bigger than themselves.

With increased online connectedness Gen Zeds can now be in contact with their friendship networks 24/7. This unprecedented connection allows today's generations to surround themselves with activity giving a sense of busyness. As such, society has witnessed a shift in its understanding of what it means to be busy, and in our 21st century we have somehow created a virtue of busyness – that by being busy it must mean we are successful. Yet busyness is an ineffective measure of our productivity, impact or success. Busyness is completely decoupled from sustainable achievement and effectiveness. In our digital era

where we are always connected and "on", we can get so caught up in being busy that we miss the important things in life – such as giving attention and focus to the relationships around us or progressing towards important goals. Today's generations are often focused more on the immediate reality, and a term which has been given to this generation is a STABO, "subject to a better offer", implying that young people are less likely to commit to planning or RSVPing to events in case a more preferable offer appears in the lead-up to that event.

We have not only filled the big blocks in our life with technology but also the smaller spaces – those times in our day which used to be built into our lives for reflection and pondering are now crammed out with checking emails, watching YouTube videos or playing apps like Candy Crush. This leads to a feeling of being constantly connected and constantly switched on.

Being busy is now often seen as a badge of honour, but can in fact be detrimental to our psychological health, our physical health, and even our relational health. The feeling of always needing to be 'on' takes away from our ability to wind down and engage in the present moment. Being busy allows for a facade of purpose, however when given the time to pause and intentionally disconnect it proves to be superficial leading to a yearning for deeper purpose. It is vital in this technological world to intentionally disconnect to recharge, which is a discipline that the emerging generations Zed and Alpha must be taught as they have known nothing else.

Shifting Social Values

There has been a clear shift in spiritual values within Australian communities. In Australia 61% of people identify their religion as Christianity and 7% identify with other religions, while 30% ascribe to no religion. In 1976, when the population was 13.9 million, 3.9 million Australians regularly attended church. Today, with almost double that population (24 million), Australia has less regular church attendees (3.5 million).

The Duke of Edinburgh's Youth Pulse Research from November 2014 highlights that of eight areas of priority tested among 879 young Australians, 'spiritual & religious' was the lowest priority, seen to be extremely or very important in priority for just 23% of young Australians but an area in which young people expressed greater levels of satisfaction than vocational & career, social & community, and financial & spending. Engaging with spirituality is not seen as a high priority by young people, nor is it felt as a strong need.

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FORECASTS • STRATEGY • RESEARCH

VOCATIONAL

Employability & Future Proofing Careers

As one of the top countries for years spent in education, Australia's students are looking for creative ways to use their skills and make a profit where study prevents them from full-time employment. This generation is less interested in jobs that do not serve their future career paths. While many work part-time in the retail and service, today's students are technological natives and have the means to start-up businesses from their bedrooms. This 'student-preneurship' begins the journey of what will be an ongoing reality for many of today's students, who will most likely be self-employed at some point in their careers.

Education has a significant role to play in aiding 'student-preneurs'. Young people use the knowledge and skills gained from formal learning in their business ventures. Universities are responding to this, developing small business courses and entrepreneurial education programs. Recently, some universities have held entrepreneurship competitions with cash prizes to help business plans get off the ground. 'Student-preneurs' may also use their connections to further market and distribute their products or services. As Australia's students spend longer in tertiary education, this emerging trend is one way in which younger generations are employing their technological savviness to great effect, as a means to financially support themselves and express themselves creatively. Scouting provides a context in which young people can explore creativity and help to identify their strengths and transferrable skills which are likely to be utilised in work and business contexts in the future.

Generational change in our community

In the last few years, the realities of massive generational change have dawned on many business leaders. While an ageing population and changing attitudes towards work have been developing over the course of a generation, many organisations are now beginning to respond. In fact, dealing with these demographic changes and specifically recruiting, retaining and managing emerging generations is one of the biggest issues facing organisations, such as Scouts Australia, who are seeking to engage these generations today.

When it comes to keeping up with the trends and preparing for the future, the focus tends to be on technological shifts. Clearly the ever-changing technologies in our society and communities are redefining our world. Yet it is the sociological and demographical changes, interestingly, that have more profound implications on our future than even the massive technological ones. From issues of an ageing workforce to massive leadership transitioning as the Boomers step out of leadership roles, it is clear that today we are living in an era of intergenerational transfers. Organisations like Scouts Australia need to position themselves to prepare for this significant intergenerational transition.

Employment and population in Australia have experienced significant change in the span of a generation. Australia's workforce has grown by 2.8 million full-time and 2.4 million part-time workers since 1984, and unemployment rates have decreased by almost 3%. This pattern will continue as the emerging generations begin to engage with the employment market.

In 2025 Gen Z will make up almost one third (27%) of the workforce. As significant stakeholders, they will continue on a platform set by Generation Y before them. Employees will become more transient, and many will start their own businesses or become their own boss. For managers, major shifts have radically redefined the workforce and their recruitment, retention and training strategies. With an ageing population a significant generational transition in the workplace will radically redefine traditional workplace environments, seeing an increase in options for workers, as well as a reflexive and relational work life.

EMPLOYMENT

FULL TIME
1984: *5.3 million*
Today: *8.1 million*

UNEMPLOYMENT
1984: *8.6%*
Today: *5.8%*

PART TIME
1984: *1.1 million*
Today: *3.5 million*

UNEMPLOYED
1984: *0.60 million*
Today: *0.72 million*

TOTAL EMPLOYED
1984: *6.4 million*
Today: *11.6 million*

WORKFORCE OF 2025

BB 13%	X 29%	Y 31%	Z 27%

Life balance focus: Shift from destination to journey

The emerging generations are balancing their study, work, friends, family, sports, social lives, and other community involvements like Scouting. This generation place value on a diverse range of experiences and embracing new opportunities rather than having a single focus or activity to be involved with. With this trend comes higher mobility, not only in their approach to careers or in their housing mobility, but to extracurricular areas where they are likely to engage with a range of activities and commitments for shorter periods of time than previous generations may have.

EDUCATIONAL

When: Starts Earlier, Continues Later

Today's learners are starting formal education at a younger age and staying in education for longer. Used to immediate and unlimited access to technology, Gen Zeds and Alphas are visual and kinaesthetic learners, confident with accessing video content and manipulating devices and interfaces to work as they need them to. For Gen Zeds, their typically preferred training style is interactive and multi-modal, deploying hands-on learning and participation in a stimulating environment.

You only have to go back just over a generation to find a time when the majority of students left school before year 12. Now not only do the majority complete year 12, (with the Federal Government aiming for a completion rate of 90%) but upon completing year 12 there is a focus on higher education. It is projected that Generation Z will be a more highly education generation than any before it, where 1 in 2 will gain a university degree. Once our preschool-aged Gen Alphas reach the end of school, this proportion may be even higher again.

Schools have also begun shifting from teacher centred classrooms to learner adaptive ones. Rather than being driven by the content needed to be covered, there is a trend towards emphasising engagement of students, and a move from formal delivery of lessons to more interactive environments. Perhaps the new forms of education and the extension of formal education will help to equip Gen Alphas with the skills and tools they need to adapt to the average of 6 careers they are projected to have over their lifetimes.[7]

How: Formal, Informal, and Non-Formal

Today's students are constantly connected through ever-advancing technology and social media. The education sector is responding to this by tailoring curriculums and classroom strategies to address the challenges and opportunities presented by this shift. The emphasis on project-based assessments and increased 'real-world' connections are evidence of Australia carrying its education systems into the 21st century. Collaboration is highly encouraged, and schools are prioritising communication skills. This change is also evident in the makeup of school communities. Today's school communities are comprised of Gen X parents, Gen Y teachers and Gen Z students. Gen X parents were shaped at the start of the computer era, and while generally not highly technologically savvy, many see the benefits of

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[7] Mark McCrindle, The ABC of XYZ, 3rd ed., p. 226.

exposing their children to technology while also seeing them grow in literacy, numeracy and social skills. There is an apparent openness to technology and an acceptance that reforms are needed to best engage emerging generations in the wider community and in schools.

In addition to formal education and informal self-directed learning, there is a growing role for the non-formal education sector to present a range of opportunities that provide extensive opportunities for young people to get involved in extracurricular activities that suit their needs and interests. While Scouting provides one option for non-formal education, there is significant competition in players seeking to provide options for young people to pursue non-formal learning pursuits.

The real challenge for education providers, both formal and non-formal, is to attract and retain Generation Y teachers, facilitators and volunteer leaders. In a sector with an ageing workforce and with record numbers of school age students in our population, the demand a strong and consistent cohort of educators is higher than ever. The average Gen Y works for only 3 years per employer, a trend predicted continue for Gen Z. New methods of engagement need to be developed to ensure that this emerging generation of educators and leaders gain career experience and grow in their skills. It is increasingly challenging to attract and retain these generations in their paid or unpaid roles due to increased demand and competition for their time. This demonstrates the need for Scouts Australia and other similar organisations to strategically engage with this cohort of potential leaders and volunteers.

A new approach and understanding of education is required to see Gen Z and Alpha fully equipped for life in this 21st century world. Education for Gen Z is about social connection, collaboration, ease of access and real-world applications. Schools are experimenting with school times and relying more on interactive social media technology and flexible learning spaces. Educators are demonstrating a trend towards replicating elements of our ever-connected social lifestyles in curricula and teaching methods to make education congruent with 21st century life. This presents opportunities for Scouts Australia to increase its engagement and partnership with schools who recognise the value of kinaesthetic and practical learning activities and could benefit from the expertise and resources that Scouting cold offer in this context.

What: Digital Learners

While all the generations have access to the latest technologies, the way these devices and platforms are utilised is strongly influenced by our times, formative experiences, and current life stage. Gen Z, followed by Gen Alpha, is the first fully global generation, being shaped in the 21st century, connected through digital devices and engaged through social media.

For Gen Z, the digital integrators, technology has blurred the lines of work and social, of study and entertainment, of private and public. Simplicity and flexibility amidst the complexity of busy lives are some of the key benefits that technology brings to the digital integrator. They

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live in an open book world where they are just a few clicks away from any information. They now connect in a borderless world, across countries and cultures. This has an impact on education systems as the need to become fluid and learner focused to fully engage the younger generations is more evident than ever.

Providing balance to this technologically focused generation with the engagement of practical offline learning provides a unique opportunity for Scouts Australia. This could be maximised by identifying access points into the community through partnerships with schools and other organisations where young people are already engaged in the learning process.

Who: Today's Students

Today's young learners are post-life stage, post-milestone, post-linear, post-literate and post-logical. Each of these changes in who the emerging generations will become are major factors in effectively educating Generations Z and Alpha.

Post-life stage

Young people, even in their late 20s, remain at home, delaying the traditional markers of adulthood. Even older people are living a life different to the one their parents lived at the same age. As a result, chronological markers are not fit to provide a full picture of a person's life stage, but the transition between life stages are more fluid and can depend on many life-shaping experiences.

Emerging generations are beginning to display a mindset that goes beyond traditional milestones, termed post-milestone. In our survey of people in their 20s, we found that more people today celebrate 18th and 21st birthdays with big parties (82% of Gen Ys, 63% of Gen Xs and 56% of Boomers celebrated turning 18 and/or 21 with a party). However, rites of passage such as 18th and 21st birthdays, which once signified that a young person was old enough to enjoy adult rights and freedoms, are now more about having fun than celebrating a milestone. Because individuals are delaying traditional life-markers such as moving out of home, getting married and having children and are instead staying in education longer, pursuing careers and moving more locally and globally, this creates for less clearly defined pathways and age cohorts.

Post-linear

For the new generations, life is no longer lived in a traditional sequence, transitioning from education to career to retirement. For current and future students, education is life-long and retraining for new careers may occur at any point. Similarly, marriage is no longer confined to the start of an adult life either. Life today is not linear but a mosaic of reinvented roles and options.

Post-literate

Today's younger generations have been born into a time that has seen the printed word morph into an electronic form, and is increasingly post-literate. In this digital era, communication is not restricted to the spoken and written word but is multi-modal. The Internet is not a literate tool but an interactive, hyper- linked medium of discovery, sound, video and images. Education is shifting from structured classrooms to collaborative means, from textbooks to laptops and from reports to PowerPoint. Words in this global era are progressively replaced with symbols or universal icons. Today, young people adopt the casual style of the spoken word in much of their written communication, while the formalities of written communication are often times ignored. In order to accelerate communication, correct spelling and the rules of grammar do not apply to them when texting and using online chat. Words are abbreviated and shortened, while commas, apostrophes and full stops are optional.

Post-logical

The age of reason has given way to the age of participation leading to a post-logical view of the world. It is not the era of experts but the era of user-generated opinion. In these post-modern times statistics do not influence with the same power as story. It is not content but process that dominates. Whether the debate is global warming or terrorism, the community consensus is reached more quickly by the emotive rather than cognitive portrayal. Even current youth slang reflects the post-logical thinking of the new generations. For Z the meaning of the word is often the opposite of its immediate connotations.

FINANCIAL

Expectation Inflation

Emerging generations have experienced 'expectation inflation' where they expect to start their economic life in the manner in which they have seen their parents finish their economic life. Their experience of economic security provided by parents and others has delayed the adulthood milestones, creating a generation with an external locus of control. Having not been shaped through tough formative experiences, some may lack the life skills to face adversity and take responsibility. The expansion of marketing directed at younger generations works to inflate a sense of entitlement. Emerging generations are also becoming Australia's most well-travelled cohort, placing an increasing emphasis on gaining new and diverse experiences.
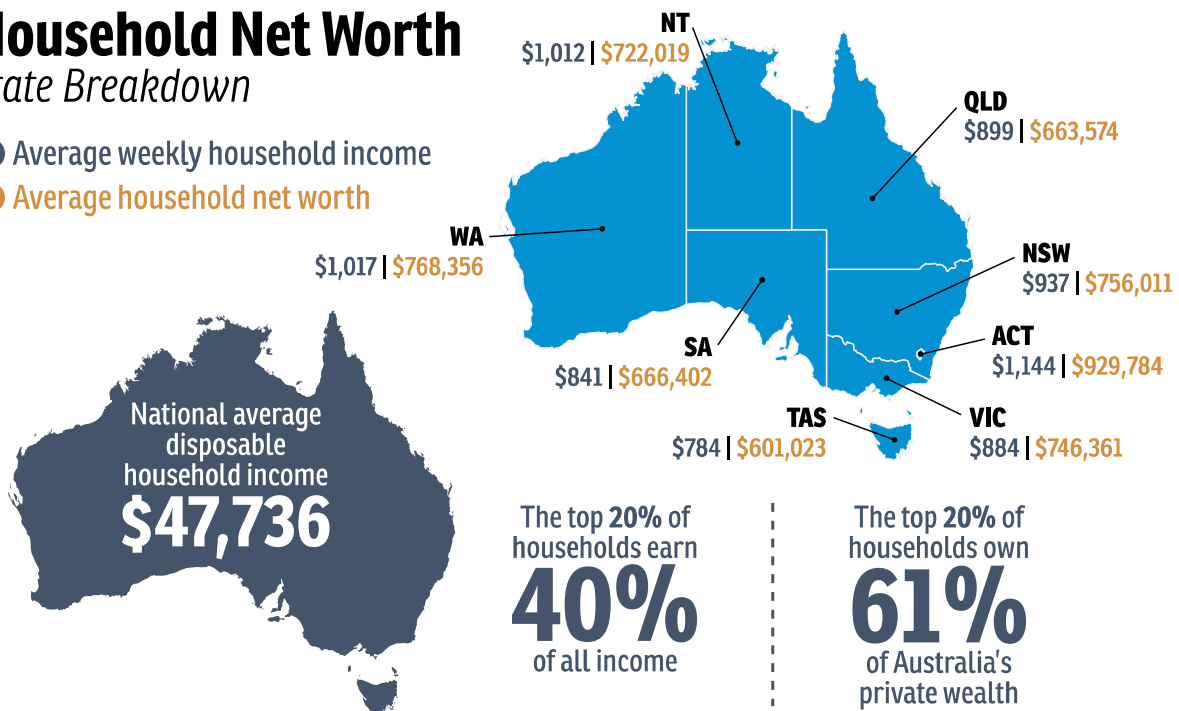
Wealth Quintiles

Australia is home to 9 million households. Understanding how household members earn and spend money can give insight as to the broader Australian context. The average Australian household has a disposable income of $48,000 annually. The top quintile (the top 20%) of Australian households have almost double the average: $88,000, and the bottom 20% have less than half that: $16,000. For 2 in 5 Australian households, there are at times some struggles to pay household bills.

The wealth perspective gives us some good insights to how Australia is travelling today. The average household in Australia, after paying off debt and liquidating assets, has just under $720,000 worth of wealth. At the bottom 20% the average is about $30,000 – the equivalent of a car. At the top 20% the average is $2.2 million, which is the equivalent of 4.5 homes. Between the bottom 20% and top 20% of Australian households there is a 70-fold differential in terms of net worth. As such, what has traditionally been thought of economically as the 'middle class' is now much harder to pinpoint It is also interesting to note that income and wealth varies across the states and territories. The Australian Capital Territory and Western Australia lead in net worth and earnings, while Queensland and Tasmania come in last.

Household Net Worth
State Breakdown

- **Average weekly household income**
- **Average household net worth**

NT $1,012 | $722,019

QLD $899 | $663,574

WA $1,017 | $768,356

NSW $937 | $756,011

ACT $1,144 | $929,784

SA $841 | $666,402

TAS $784 | $601,023

VIC $884 | $746,361

National average disposable household income
$47,736

The top **20%** of households earn
40%
of all income

The top **20%** of households own
61%
of Australia's private wealth

From a generational perspective, there are some significant differences when it comes to income and wealth distribution. The Baby Boomers, for example, have an economic footprint more than twice the size of their demographic footprint, owning almost 2.5 times their percentage of the population in national private wealth. For Generation Y, on the other hand, their economic footprint is a third of the size of their demographic footprint.

Household Net Worth
Generational Breakdown

● % of national wealth
● % of population

Builders		Builders		Boomers		Boomers		Generation X		Generation Y	

Builders — Aged 75+ $786,900 — **17%** 7% — *Thrifty (or not) spenders*

Builders — Aged 65-74 $1,007,600 — **22%** 8% — *New retirees*

Boomers — Aged 55-64 $1,086,400 — **24%** 11% — *Twilight builders*

Boomers — Aged 45-54 $872,800 — **19%** 13% — *Boomers building for retirement*

Generation X — Aged 35-44 $572,100 — **13%** 14% — *Generation X putting in place the foundations for future saving*

Generation Y — Aged 25-34 $247,200 — 5% **15%** — *Millenials looking to be engaged in their future wealth*

However, a large-scale transfer of wealth will occur over the next 2 decades as the Baby Boomers head towards retirement and the younger generations begin to receive an inheritance and transfer of this wealth.

Self-Actualisation

Among Gen Z and Alpha there is a desire to achieve more than just a pay check. Organisations wishing to engage these generations must be values-based, making societal contributions and empowering young people to actively support causes that they believe in. Increased commitment from members often comes directly by achieving congruency with their values and resonance with the causes they believe in. To fully harness the ingenuity of creative young people, organisations would do well to empower young people to create their own set of values rather than encouraging adherence to traditional organisational values.

In terms of leadership styles, Gen Zeds are particularly attracted to models that value consensus, where each party is given a voice and a platform to share their views and ideas, and a context for expression of feelings. This is reflective of the ways in which social technologies have enabled individuals to publish their own reflections, opinions and ideas in a variety of formats, accessible almost anywhere. The viral nature of causes on social media forums such as appeals to help by sharing posts for campaigns such as Kony2012 and the Ice Bucket Challenge demonstrate the magnitude to which these emerging generations desire to make a difference. Their increased connectedness brings greater global awareness than ever before, while some may be lost for a cause or motivation with which they feel unable to make an impact. Youth organisations hoping to engage and mobilise these generations will find success in attending to this desire for self-actualisation.

CONCLUSION

Strengths

In light the changing times and emerging generations which have been discussed in length in this study, there are a number of strengths in Scouts Australia's positioning and offering which have been identified. These are not limited to but include the following:

- There is a strong desire from Australian families for children to be active and outdoors which Scouting provides
- Learning styles within Scouting are highly kinaesthetic and practically based which provide valuable, transferrable life skills for these emerging generations
- Scouts Australia is strongly values-driven and connects young people with a sense of purpose and challenge which is bigger than themselves
- In a world of superficial connections through social media, Scouting is a context which offers authentic, relational, offline community

Weaknesses

In reviewing the current positioning of Scouts Australia, the following may be some challenges to be aware of:

- Whilst Scouts Australia has the strength of tradition, the challenge to remain current, relevant, innovative, and attractive to a media-savvy, fast-moving, sophisticated, informed generation of young people is ongoing
- In a society of increased mobility affecting many areas of life, a program like Scouting which is built through long-term engagement by participants is a challenge when people are more accustomed to making short-term commitments
- In a time-poor environment with increased extra-curricular options, there is not as much attention given to community programs like Scouting as in the past
- Australia is increasingly culturally diverse and there is a challenge for Scouts Australia to reflect this increasing diversity

Opportunities

As society shifts and the concept for community evolves, so do the opportunities for Scouts Australia to engage young people in Australian society:

- There is opportunity to build relationships with existing educational providers such as schools where the attendance of young people is already established and in which Scouts could provide an offering which schools are likely to be in need of
- As Scouts Australia is part of a global network, there is an opportunity to mobilise a global cohort of members to strengthen the community, endorse the Scouting movement, and advocate for initiatives and causes connected to Scouts
- There is opportunity to develop and inspire the next generation of Scouting leaders to be active contributors in their local community

Threats

In achieving these opportunities, Scouts Australia faces a number of possible threats:

- The increased competition of extra-curricular program providers that are seeking the time and attention of young people and partnerships with schools
- In an era of information overload, it is far more complex to get cut-through and engage young people, necessitating innovative communication and marketing strategies
- In a time-poor society with the challenge of many competing time commitments among families and the desire for new experiences among young leaders, recruiting and training a strong cohort of community-based volunteer leaders is a significant challenge