

EYES 2021

EMERGY YOUTH EARLY SIGNS

Thoughts of International Youths

Brazil, China, France, South Africa & the USA

under the direction of **Claude REVEL**

in collaboration with the consulting firm **Antidox**



SKEMA PUBLIKA

SKEMA PUBLIKA is an independent think tank aiming to produce accessible international thought far from formatted conventions, to fuel public debate and better enlighten national and international policymakers.

Affiliated with SKEMA Business School, the think tank addresses political and societal issues connected with public policy and on which SKEMA has a legitimate voice. It tackles them from the angle of early signs, anticipates and formulates recommendations for “after”. It uses a multidisciplinary and hybrid approach to information processing, combining human and digital intelligence. It draws on the international and transcultural dimensions of SKEMA, a school present on five continents with thousands of students and hundreds of researchers.

The think tank has a Strategic Committee composed of high level international personalities without any political affiliation.

SKEMA PUBLIKA produces five collections: EMERGY (early signs), FER (finance, ethics, regulation), UNCERTAINTIES (under-explored areas of risk analysis), INTERFACES & INFLUENCES (interactions of different worlds) and COUNTRY FOCUS.

The EYES 2021 report presented here is the first entry in the EMERGY collection.

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OUR APPROACH

UNDERSTANDING THE EARLY OPINIONS OF YOUTHS IN FIVE COUNTRIES

The *Emergy Youth Early Signs* or EYES report sets out to capture the early stages of opinion forming in international youths by recording the views they express informally both in real life and online. The report then analyses their words for weak signals they may contain. The focus is on five social issues initially prioritized by the international students of SKEMA Business School. From this work, the report draws insights and possible courses of action, for national and international public policy makers to consider. With EYES, SKEMA PUBLIKA offers a “glocal” analysis, i.e. one that is both local and global, along with precious comparative data.

Outside of ranking favourite companies and conducting surveys about diplomas and salaries, little work has been done to understand the societal concerns of young people before their formalization.

In 2008, in partnership with the French think tank Fondapol, Kairos Future conducted an international survey on different issues (family, work, identity, links with institutions, etc.), entitled [Young People Facing the Future](#). It was an invitation “to reconsider our perceptions of young people and break away from ineffective categorical public policy to instead adopt a policy in service of a social project. Because, without a ‘collective myth’, young people tend to withdraw into themselves, with no hope for their society or for themselves”. **This conclusion seems entirely consistent with our results on other issues.** A few years later, Fondapol published [2011, the Youth of the World](#), based on a survey carried out by TNS Opinion. It focused on the values of young people on various subjects, ranging from globalization to work, spirituality, sexuality or technology.

[A report by Institut T  los dated 13 June 2019](#), focused exclusively on young French people and noted the strengthening of “statist” opinions, adding that “the relative individual optimism of the majority of young people is combined with a strong distrust of society and its institutions, a distrust actually shared by adults”. **These expectations of the State emerge in our study too, in all five countries.**

Conscious of it being a global issue, the OECD launched in 2013 a *Youth Action Plan* for member countries, focused on the attitude of young people toward work and on their integration into the labour market. The plan was updated and expanded in 2021 following the COVID-19 crisis. In the same year, the international organization created a [Youth Advisory Board](#) to better listen to the voices of young people in OECD countries.

Finally, UNICEF published in 2021 the results of the intergenerational survey [Changing Childhood](#), which asked 21,000 young people in 21 countries about their visions of the world. **Some of the trends highlighted in the survey corroborate those identified in this report, including distrust of the media.** The study also raises the question of the relation between identity and globalization: 39% of young people express a sense of belonging to the international community, almost twice as many as their elders (22% for those 40 and older). We address this issue in chapter I.

THREE GOALS

1. Capture the informal expression of views on five political topics

The report captures **the informal voice of 18- to 24-year-olds of five nationalities on five topics of political interest**: traditional media and the press, social media, new technologies, security, and the world of work. The five countries covered in the study are Brazil, China, France, South Africa and the United States. These are the five countries where SKEMA has established one or more campuses.

2. Identify similarities and differences between nationalities

Taking a global comparative approach, the report points out the **similarities and differences** between emerging concerns around these issues among young people. When well-founded, this exercise can begin to shed some light on the ways opinions spread between nationalities. The authors have sought to pinpoint their trajectories of dissemination and influence. **The value of the report lies not so much in the circumstantial information, but**

rather in the transfer of ideas and the community of mind it does or does not reveal. However, the complexity of this research led us to proceed with the utmost caution when deciding on the conclusions to draw on these paths of influence. The report thus opens the way for future advances by the think tank on the influence dynamics at work.

3. Inform the decisions of national and international policymakers

The report uses both direct consultations with SKEMA students and data gathered by scanning a social network for the same issues, thus **combining human and digital intelligence**.

SKEMA PUBLIKA **analyses this information and makes it available for public debate and to national and international policymakers**, to ensure the voices of these young people are heard. **It also points out red flags and suggests courses of action when possible.**

The authors analysed the data from various angles. They do not pretend to be objective, but they do guarantee independence. They hope this exercise will open the way for further research to be conducted using this three-pronged approach.

The report intends to **detect the foundations of the formation of nascent political opinions among young people** on the verge of becoming (or who have recently become) voters and who haven't all been given the possibility to voice their opinions in electoral processes yet. In fact, the OECD reports that 40% of 18- to 29-year-olds feel that their point of view is not taken into account when designing public services¹. **Their need to be heard is evident** and, to the extent possible, this report wishes to facilitate the link between young people and policymakers.

We are publishing this report at the dawn of **2022, an especially important electoral and political year in France, Brazil, the United States and China**², which should push decision makers to introduce new public policy measures either before or after each country's due date.

In sum, in a globalised context subject to particularly significant paradigm shifts, we wish to **contribute to elaborating substantive political solutions to give to those who are the youngest stakeholders in the public debate of our five countries**. At a later stage, the results obtained will be developed by country or by issue/theme.

METHODOLOGY

1. Stakeholders

The EYES report is the result of the work of three stakeholders:

- the 36 SKEMA students of ten nationalities who made an initial mapping possible and helped lay the groundwork for a prioritization of the major issues of concern to young people;
- the consultancy Antidox, which monitored the accounts of around 2.8 million young people on Twitter (all themes combined) to spot trends;
- the SKEMA PUBLIKA team which, with the support of experts both internal and external to SKEMA, extracted and analysed the data relevant to public debate and to policymakers.

2. Theme selection

The EYES 2021 report focuses on five major themes — **traditional media and the press, social media, attitude toward new technologies and Big Tech, security, and attitude toward the world of work** — as they are perceived

¹ *Young people's concerns during COVID-19: Results from Risks That Matter 2020*, OECD, June 2021.

² France : 10 April and 12 June, presidential and legislative elections; Brazil : 2 October, presidential and legislative elections; United States : 8 November, election of representatives and senators; China : National Congress of the Chinese Communist Party in autumn.

by the young people in the five countries where SKEMA is established, namely **Brazil, China, France, South Africa and the United States**.

The themes were chosen based on several weeks of consultations held with American, Belgian, Brazilian, Chinese, French, Gambian, Indian, Italian, Romanian, and Senegalese students at SKEMA between September 2020 and March 2021. The consultations determined their major concerns about the future. Eight themes emerged. Five were selected by combining certain criteria: degree to which the theme has been covered by other think-thanks or information producers, SKEMA PUBLIKA's penchant for themes connected with news and information (traditional media, press, and social media), relevance to policymakers, desire to focus this first study on a limited number of issues.

We are conscious that young people were interviewed or observed in the midst of a health crisis affecting all countries and this, of course, may have influenced their responses. In any case, it is not possible to overlook this reality which undoubtedly contributed to shaping the opinions of both young people and the general population.

3. Data processing

Once the five themes identified, we conducted our study on a large scale with the assistance of the consulting firm Antidox, over the period spanning 1 July 2020 to 30 June 2021. The Twitter monitoring and keyword spotting were performed in each country's native language: French, English, Brazilian Portuguese and Chinese.

4. Why Twitter?

Twitter is a popular place for expressing and debating ideas. The platform has the advantage of offering largely public content that is visible to all. The 18-24 age group is well represented there, making up 17.1% of total users³.

The network is widely used in four of the five countries studied (Brazil, France, South Africa, United States), with a number of users ranging from 2.3 million in South Africa to 73 million in the United States. Twitter is especially popular with web users in the United States and Brazil, the first and fifth leading countries based on number of users in 2021⁴.

In China, however, Twitter is officially blocked. Its use is therefore marginal, limited to web users residing outside of China or to those using a VPN for geo-spoofing (simulating an IP address outside of China to gain access to the social network). The Chinese sample would therefore probably not be representative of Chinese youth in general; nevertheless, we can be reasonably confident that its expressions do reflect the opinions of certain groups of Chinese youths. Our analyses took into account this situation which we know results in a probable over-representation of diverging opinions. In the future, monitoring the Chinese social network Weibo would allow us to better understand the opinions of all segments of Chinese youths.

The potential biases connected with choosing Twitter do not appear to weaken the results obtained, insofar as they are taken into account in the analysis: strong dependence on news, possible over-representations of negative points of view and of a certain type of population among users, self-reported data on user age and nationality, etc. These biases are outlined in detail in the methodology annex. The originality and interest of our comparative approach seemed to us to largely outweigh the identified biases. With this first study, we are indeed clearing a new ground, which we will refine later.

5. Report structure

Following a cross-sectional analysis, the EYES 2021 report is structured according to a theme-by-theme presentation to facilitate its operational use by those responsible for public policy. Insights and implications are systematically presented at the end of each chapter.

³ Data from Statista, April 2021.

⁴ Data from Statista, July 2021.

KEY POINTS

COMMON ISSUES, DIVERSE YOUTHS

The analysis confirms the existence of several different youths rather than a single global one. This point is crucial. Indeed, **overlooking it could lead national policymakers to adopt measures that are out of sync with the true sensibilities of young people**, resulting in surprises – especially of the electoral kind.

1. Exportation of ideas but different references

While young people **raise common issues, exchange opinions, export and spread judgements** (notably in the form of hashtags) using the same words, they do not attach the same level of importance to these and, more importantly, they **do not always understand them in the same way. The words are similar, but the associated references are often different.** This diversity appears, for example, on the topic of security, the third most discussed theme. Yet, this is one of the topics **where the exportation then extraterritoriality of judgements are the most frequent**, along with those relating to the regulation and responsibility of both traditional and social media. Due to this ambiguity, the “global” nature of the true concerns of young people should be evaluated with the utmost caution.

2. Traditional media, the press and social media are the top priorities... but not everywhere

Of the five themes covered – traditional media/press, social media, security, new technologies, and the world of work – the least talked about are the last two. In national terms, traditional and social media are more talked about than the other themes in the United States, Brazil and South Africa. The security theme is the one where young people from China and France are the most represented as a percentage of their overall population. Using the same indicator, young people in China and Brazil are more present on the issue of new technologies. Topics connected with the world of work are much more popular with French youths than with other nationalities. National leaders could take these priorities into account in their programmes.

3. Forward-looking youths?

The words “change/future” are widely used by Chinese youths first, then Brazilians, South Africans and Americans. However, they are shared a great deal less in France, across all themes. **Whether they are used positively or negatively, these words are theoretically indicators of envisioning the future. Thus, their lesser use in France should raise a red flag with this country’s politicians.** Is it a sign of disinterest? Disillusionment? The timing of our survey, in the midst of a health crisis affecting all countries concerned, may be one reason for this positioning in the “here and now”, given the uncertainty around how the crisis would evolve. It could also indicate a lack of prospects given by politicians, or in any case the lack of a clearly visible social project and a failure to offer young people a “collective myth” (this was the analysis of the [Kairos Institute in 2008](#), which pointed out the need to present young people with a collective project, not merely categorical measures).

TRUST DOES NOT PREVAIL

With a few geographical nuances, **trust in traditional media is extremely low and is only slightly higher in social media**, with both accused of communicating false information. **As for trust in new technologies, it is in China and France that it is the most discussed, while the most negative views on artificial intelligence come from Brazil and, to a slightly lesser degree, the United States.**

1. Fake news, regulation and censorship

There is a deep, general mistrust of GAFA (Google, Apple, Facebook, Amazon, also known as Big Tech, the Big Four, or the Tech Giants). Across all five countries, the most engaging debates are about freedom of expression, the censorship power of these companies, and the challenges in regulating them. While the young people of all five countries are evidently concerned about fake news, the qualitative face-to-face interviews show that they care about the balance to strike between regulation and censorship. This position is ambiguous, as young people also readily turn to content creators on social media to keep informed.

2. Mistrust of the corporate world

To an extent we had not imagined, the corporate world is viewed negatively by young people in all five countries. The disappointment in the world of work is shared by everyone. This is not the primary finding, but the presence of such a feeling in young people who, for the most part, still have little to no work experience should raise a major red flag for leaders in the public and private spheres.

3. An ambivalent attitude toward traditional media and social media

According to a November 2021 survey of the general population by Statista, trust in the dominant media is lowest in France and the United States, and higher in Brazil⁵. Our report indicates that, among the young people of the five nationalities observed, trust in traditional media and social media is also very relative, with a little less distrust shown for traditional media, particularly among French youths. Ambiguity reigns on social media: while on an individual level their use is often presented as psychologically disturbing, the perception in the collective experience is significantly more positive, given the many political opinions shared and the support for activists.

YOUNG PEOPLE CALL ON THE STATES...

The results of our study more broadly confirm those of [a 2019 report by Institut T  los](#) covering France only, which pointed out that **young people expected a great deal from the State**. In our five countries, the role of States, governments and regulations is widely mentioned, and **young people seem to express high expectations with regard to these, on issues relating to traditional media, social media, security, and new technologies**. There seem to be lower expectations for issues relating to the world of work.

1. ... to regulate Big Tech

Firstly, where GAFA are concerned, national or international regulations would not displease young people at all. In fact, they are calling for them. Young people's support for this is an advantage for decision makers at a time when, on an international level, they are deliberating over fiscal and editorial rules to apply to Big Tech. On the other hand, **there is markedly less enthusiasm for regulations governing information itself** (fake news issue) and about the risk of censorship. In all likelihood, these findings do not concern China, which has its own tech giants, BATX (Baidu, Alibaba, Tencent, Xiaomi).

2. ... to reform the corporate world

While the State is seldom mentioned on the subject of the world of work, the deep mistrust voiced on this theme, particularly with regard to the corporate world, could suggest a need for substantive regulations concerning the very paradigms of work organization. This finding intersects with another note by the SKEMA PUBLIKA think tank⁶ which points out an imbalance between the stakeholders within companies and urges them to take measures to restore balance. This de facto reappraisal, so internationally shared among our youths, justifies the search for **different youth employment solutions by the major international organizations concerned, for example the ILO, UNIDO, and the OECD**. The member States should consider this a major issue.

⁵ When presented with the statement "media news can be trusted most of the time", 29% of American respondents, 30% of French and 54% of Brazilians agreed ([Statista](#), source Reuters Institute Digital news report).

⁶ *Democracy Operates Through Businesses Too*, Prof. Dhafer Saïdane and Sana Ben Abdallah. Available here: publika.skema.edu.

3. ... to protect

On the subject of security, we feel – no doubt by extrapolating their meaning to some extent and even though the signal may be weak – that the concerns expressed and the circulation of hashtags about attacks on institutions and national security show a recognition of the democratic essence of the State. This seems rather interesting and unexpected given such an international sample.

4. ... to teach critical thinking

Finally, the distrust of social media, traditional media and fake news **raises the question of better individual education**. The SKEMA students noted that they and their peers had learned most of their critical thinking skills from their respective families and very little from the primary and secondary education system. In our opinion, if there were one set of skills that it would be essential to introduce in secondary school and continue to teach in higher education, it is the **discipline of information**. The need is even more crucial now given the avalanche of data. **An education in critical thinking** skills encompassing history, economics and philosophy would **provide students with at least a basic ability to question, sort and validate the information received**. This subject is currently being explored by UNESCO.

CHAPTER I

GLOBALIZATION VS NATIONALITIES, AN OVERVIEW

GLOBALIZATION VS NATIONALITIES, AN OVERVIEW

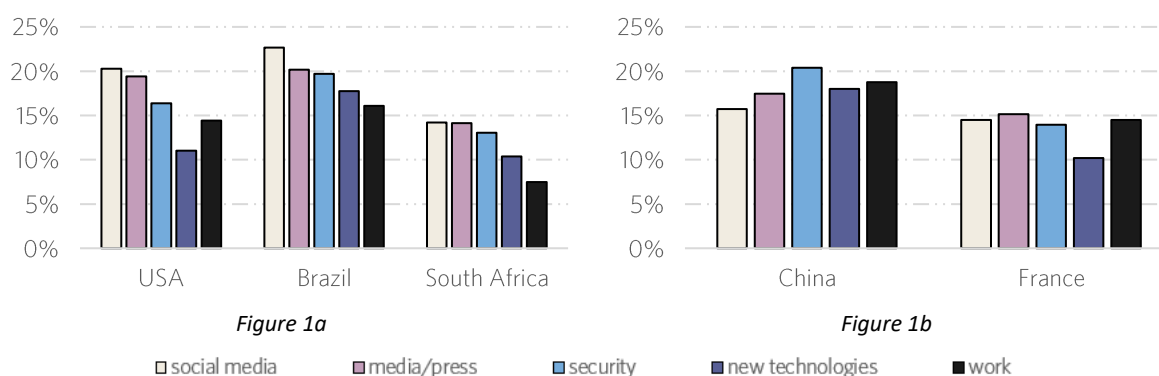
In total, some one hundred verbatim statements of young people gathered in working groups, **then 55.5 million tweets** published between 1 July 2020 and 30 June 2021 by nearly **2.8 million young people aged 18 to 24**, were analysed. The volume is significant, but uneven across themes and countries.

TRADITIONAL MEDIA AND THE PRESS, SOCIAL MEDIA, AND SECURITY ARE THE MOST POPULAR SUBJECTS

Over the year in question, **the most engaging topics** for young people aged 18 to 24 in all five countries are the **traditional media and the press**, with 32.9 million tweets published by 1.5 million young people; **social media**, with 11.9 million tweets published by 787,600 young people; and **security**, with 10.3 million tweets published by 500,000 young people. The 18 to 24 age group represents 20.3% of the total users that expressed opinions on social media, 19.2% of those that expressed an opinion about traditional news sources, and 16.7% of those that expressed an opinion about security.

The themes **least discussed were new technologies**, which received 252,400 tweets from 20,100 users, and **the world of work**, with just 53,100 tweets from 4,900 users. Young people aged 18 to 24 represent 15.3% of the conversation about the world of work and 12.8% of the conversation about new technologies.

The United States, Brazil and South Africa follow the overall trend: the young people of these three countries are more represented in the overall conversation about the three most engaging themes (see figure 1a). They also speak more (see figure 2) about these three themes. They lose some interest in the other two.



Figures 1a and 1b: Theme popularity based on the percentage of 18- to 24-year-olds in the total number of users who expressed views per countries. Reading: South African youths represent 14.2% of all South Africans who tweeted about social media.

China and France deviate slightly from the general trends. The security theme is the one Chinese youths engage with the most, at a rate of 20.4% of their country's overall conversation (see figure 1b). This is the leading theme in terms of proportion of 18- to 24-year-olds and the second by number of tweets. In contrast with the other countries, Chinese youths speak less about social media. As for young French people, based on the volume of tweets published, they also have a preference for the topic of security (see figure 2). Young French people particularly engage with topics relating to the world of work, a theme that ranks second in terms of proportion of 18- to 24-year-olds in the discussion (14.5%), placing it on a par with the topic of social media.

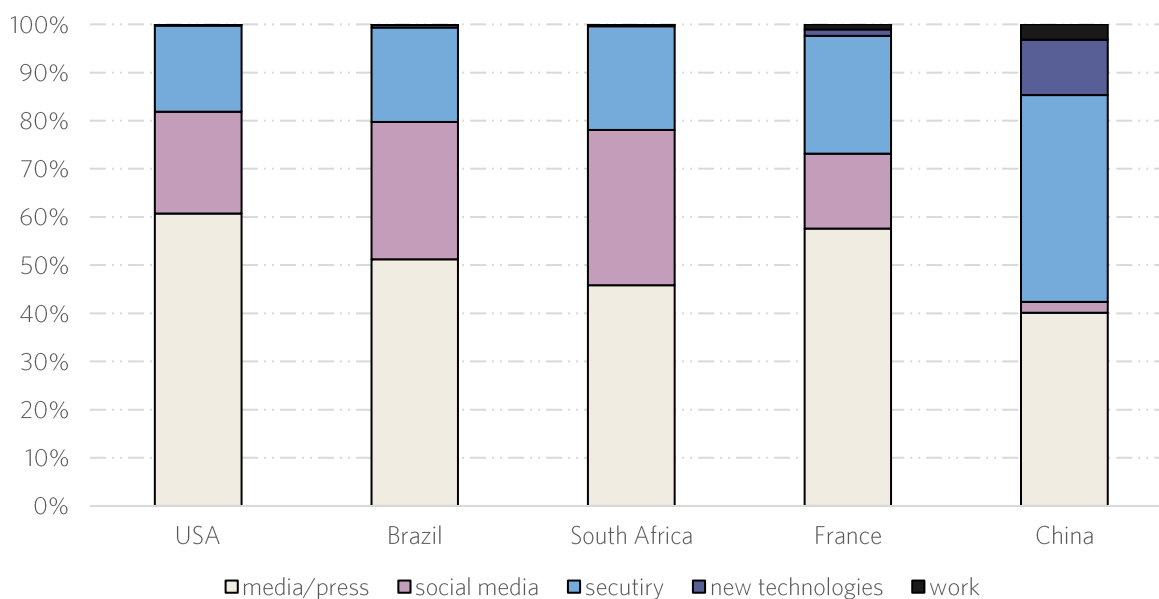


Figure 2: Theme popularity with young people, based on the number of tweets published per country.

It is interesting to note that **the geographical distribution of conversations on the topics of new technologies and attitude to the world of work is different to that of the previous themes.** Indeed, while young Americans remain in the lead, they represent less than half of young people discussing new technologies globally (46.9%), while Chinese youths represent nearly a quarter (23.4%). The disinterest of young Americans is accentuated on the question of work: they represent only 30.8% of the overall conversation, with French youths at 39.1% and young Chinese at 24.7% (see figure 3).

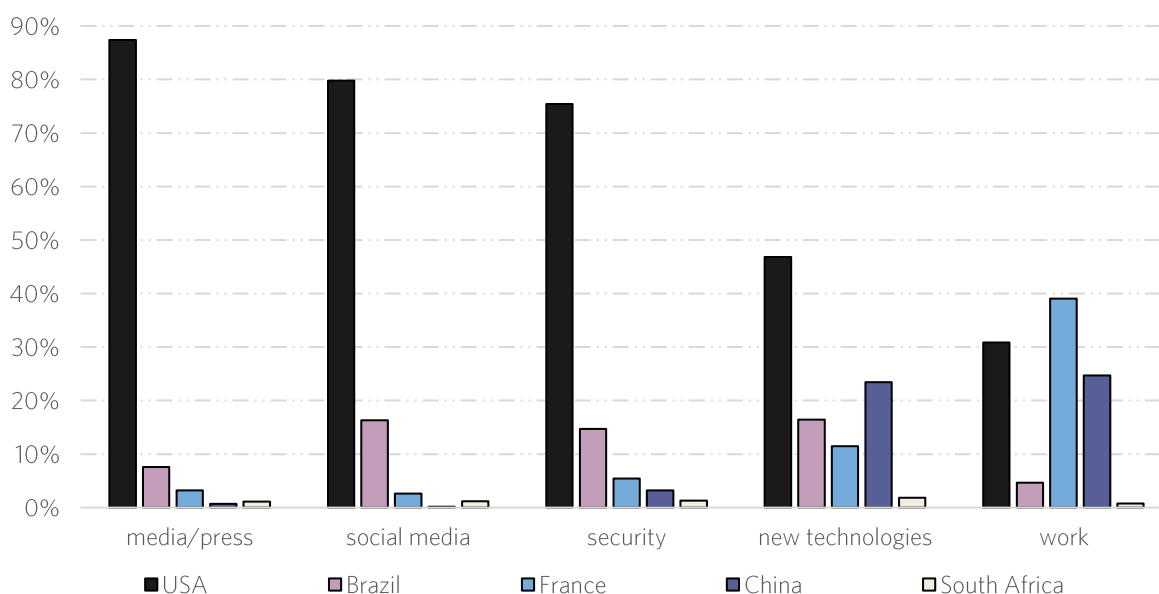


Figure 3: Contribution of each country to the overall conversation, based on the number of young people who tweeted for each theme. Reading: Brazilian youth represent 16.4% of global youth from the five nationalities who tweeted about new technologies.

THE ROLE OF THE STATE IS SYSTEMATICALLY RAISED

Of the list of words tested (see methodology annex), **“State” and “government” are almost systematically the terms most frequently used for each theme.** Of the 55.5 million tweets analysed, more than 4% mention the State or the government. This percentage rises to 20% among young Chinese, 6.2% among young South Africans,

and 4.9% among young Brazilians, and it drops to 3.7% among young Americans and 3.6% among French youths. These figures are an average. Young Chinese and French people, for example, are the most inclined to associate the State with the topics of social media and new technologies.

The predominance of this association is strongest on the topics of traditional media/press and social media, where it is the leading word association across all countries, with the exception of young Brazilians who, on these topics, place more emphasis on freedom issues. It is also the strongest on the topic of security. The association remains in the lead on the topic of new technologies. In contrast, young people use this association less spontaneously when discussing the world of work.

THE FUTURE

Use of the words “future”, “act”, and “change” is unevenly distributed across the youths of different nationalities. **Young French people are less inclined to use them, trailing far behind the other nationalities**⁷. Only 0.5% of their tweets, across all themes, include these words, whereas young Brazilians, South Africans and Americans use them in 2.5% of their tweets on average, i.e. five times more. Chinese youths are in the lead, with 4.7% of tweets mentioning “future”, or “act” or “change”.

FROM LOCAL TO GLOBAL: EXPRESSION AND INFLUENCE

Young Americans make up 82.7% of the young people who expressed views on all themes, followed by young Brazilians (11.4%) and young French people (3.5%). The youths of China and South Africa each represent just 1.2% of the total. This result reflects an over-representation of young Americans on Twitter (the United States makes up 69% of total Twitter users across our five countries – see methodology annex). National preferences in terms of platforms for expression doubtless play a part in this.

However, these quantitative assessments do not tell the whole story.

It also makes sense to examine the geographical spread of the messages. If we look at these figures in relation to the propagation of hashtags among young people with a focus on the topics we studied, **it would seem that this propagation is mainly from the United States towards the other countries** (*#FakeNews*, *#BlackLivesMatter*). During our analysis, we did not notice any movements spreading as widely in the opposite direction. For example, the *#EndSARS* hashtag⁸ starts in Nigeria then propagates to South Africa and a little to the United States before its trajectory stops.

This first analysis highlights **the extraterritoriality or multi-territoriality of societal issues. Influence on Twitter seems to propagate from the United States outward to the rest of the world. This observation, which is yet to be supported, is already revealing of the construction of influence over and by young people across social media.**

Analysis of the information collected led us to wonder about the **link and interactions between globalization and roots**. While “cultural globalization can be defined as the stage in the history of the world where places and people find themselves interconnected to a degree never before observed”⁹ – something which our study confirms, notably with the extent of hashtag propagation –, the associations of qualifying words (trust, etc.) and themes often reveal national singularities. Might the right answer to the question “globalization and/or roots” be “both”? Based on the hypothesis, to be examined in greater detail in future studies, that **while words spread and can be relayed, the same cannot be said for the associated concepts and references.**

⁷ This attitude should be considered in relation to two surveys of 18- to 24-year-olds conducted in September and November 2021. In the first, conducted by [Opinionway for Le Figaro/L'Étudiant](#), 58% of respondents stated they were confident in the future of their generation. In the second, conducted by the market research and data analytics institute [YouGov for the employment website Monster](#), only 49% could envision a positive future for themselves (41% for female respondents).

⁸ The EndSARS movement calls for the disbanding of the Special Anti-Robbery Squad, accused of numerous human rights violations.

⁹ François Chaubet, Laurent Martin, in [Histoire des relations culturelles dans le monde contemporain](#), 2011. In French.

This point is of particular note to policymakers and should be studied further. Because this is how, concretely, we can arrive at “surprising” situations, such as during the September 2021 German federal election when young people who readily relayed environmental concepts and were supposed to be voting for “the Greens” voted instead for the liberal party in greater numbers than expected.

The conversations had with the SKEMA students, along with the analysis of certain hashtags, confirm the intuitive approach according to which **the same words are not thought of in the same way by the different nationalities**, even when expressed in the students’ native language. This is the case, for example, for the theme of security, prioritized as the case may be as physical or digital security, security from institutions with a focus on the role of the police, or in relation to freedom (see chapter IV).

We considered **the transportation of concepts deriving from a “Western” approach** to certain themes which may have infiltrated the general opinion, but at this stage we have no answers. The doubts expressed about traditional media and social media are unanimous, as is the negative image of the corporate world. However, the similarities noted are logically steeped in national cultural particularities, especially on issues pertaining to State prerogatives, such as security. This is clearly an important point requiring vigilance on the part of decision makers in charge of elaborating international standards or recommendations.

CHAPTER II

TRADITIONAL MEDIA AND THE
PRESS,
BLANKET CRITICISM TO BE
TAKEN INTO ACCOUNT BY
POLICYMAKERS

TRADITIONAL MEDIA AND THE PRESS, BLANKET CRITICISM TO BE TAKEN INTO ACCOUNT BY POLICYMAKERS

Although this topic was discussed in a variety of ways by our groups of SKEMA students, the general perception was rather negative. They readily mentioned a phenomenon of “loss of credibility of the traditional media” but to a lesser degree than that attributed to social media.

In any case, of our five themes, **this is the one that generated the largest volume of conversations on Twitter, with more than 32.9 million tweets published by 1.5 million young people** in the five countries. Young Brazilians and Americans respectively represent 20.2% and 19.4% of users that discussed the topic within the two countries. French and South African youths contributed a smaller share of the overall conversation (just 15.1% and 14.1% respectively).

	number of tweets by young people	number of young people
USA	28 500 000	1 300 000
Brazil	2 877 000	113 200
France	1 102 000	47 600
China	270 800	10 100
South Africa	188 900	16 900
total	32 938 700	1 487 800

A STRONG CRITICAL SENTIMENT IN THE UNITED STATES AND BRAZIL

Young Brazilians and Americans are those who spoke the most about this issue, in terms of tweet numbers but also of the proportion of the overall conversation in their country. These two States are marked by a political polarization of their society. During the period studied, their two leaders had **strained relations with the traditional media outlets and criticized their partiality**. Whether as a consequence of this or not, in Brazil and the United States we see a clear trend among young people toward the denigration of traditional news sources.

These are the two countries where the negative sentiment of 18- to 24-year-olds toward the terms “media” and “news” is the strongest: 50.2% of tweets containing these two words have a negative connotation in Brazil, versus 48% in the United States. **The issues of trustworthiness, credibility and reliability of the traditional media outlets are also more heavily discussed** there, with 256,000 tweets in the United States and 32,900 in Brazil.

The term “fake news” is the most popular there (second most recurring term from our selection of keywords). In Brazil, the disapproval extends as far as singularly attacking the leading media outlets: *#GloboLixo* (Globo garbage) is the fifth most popular hashtag among young people (3,600 results)¹⁰. In the United States, the association of the words “media” and “manipulation” generates 35,400 tweets¹¹.

YOUNG PEOPLE HAVE LITTLE CONFIDENCE IN THE DOMINANT MEDIA OUTLETS

The phenomenon of mistrust extends to the other three countries, but to a lesser degree. In those countries, the rate of negative tweets oscillates between 30 and 40% (see figure 4). In China, the term “fake news” also

¹⁰ The Globo Group is a Brazilian media conglomerate with television networks, radio stations, newspapers, magazines, etc.

¹¹ Over the period spanning 1 May 2020 to 30 April 2021.

appears regularly and is associated with close to 4% of tweets containing the words “media” or “press” (see figure 5). In this country, as in France, it is the third most used term among our keywords. It is the fourth most popular term in South Africa.

Young people denounce a biased and sensational reporting of news by traditional media outlets as well as the systematic absence of fact checking. However, this criticism is focused on highly political events (*#WhatsHappeningInMyanmar*, *#EndSARS*, *#SaveSheikhJarrah*, *#ThumaMinaMediaGroup*, *#PutSouthAfricansFirst*, etc.) for which the possibility of specific actions by activists cannot be excluded.

Issues relating to freedom of the press are more widely discussed by young people in France and China. In France, “freedom” is the second most frequently used term, with a volume of 12,000 tweets (1.1% of the theme). It is the fifth in China with 1.6%.

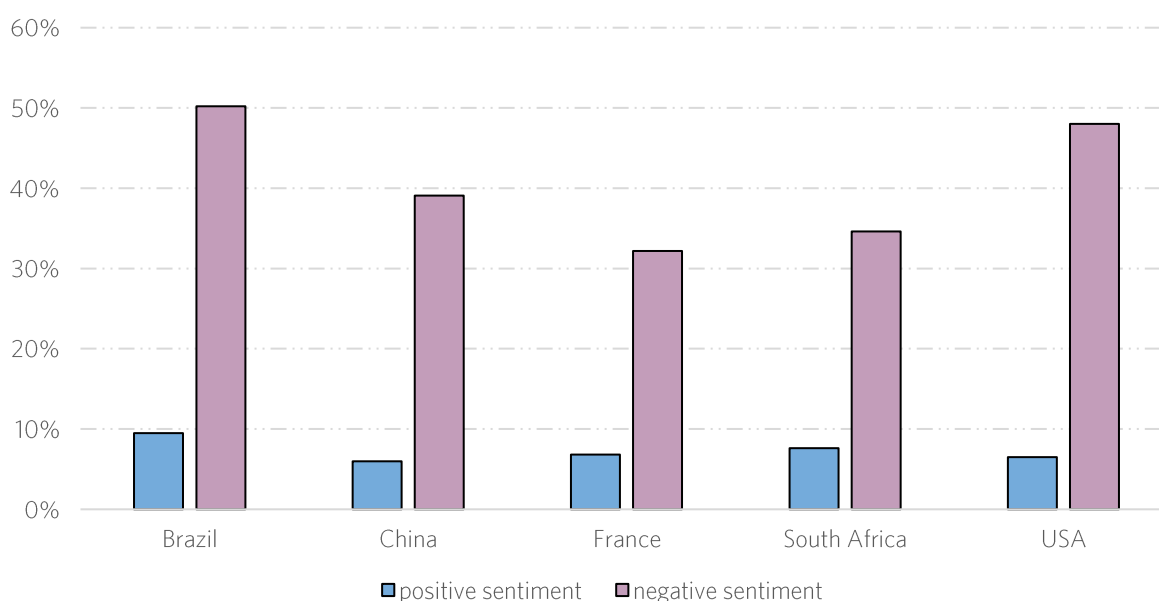


Figure 4: Sentiment of young people's tweets containing the words “media” and “news”¹².

WHAT ARE THE EXPECTATIONS OF YOUNG PEOPLE AS TO THE ROLE OF THE STATE?

Of all the keywords tested, the association of the expressions “media/press” and “State/government” is the most significant among young people of all five countries. This corresponds to elements of the discussions held with the SKEMA students, who wondered how governments must interfere with the news content circulating in their country. The feeling of manipulation was palpable. Balance between disinformation and censorship was considered a major issue. In China, 14.1% of the tweets on this topic mention the words “State” or “government”. This percentage reaches 6.7% among young South Africans, 6.3% among young Brazilians, 3.9% among young Americans, and 3.2% among French youths. A similar trend is observed on a smaller scale with the association of the words “media/press” and “regulation”.

SOCIAL MEDIA, THE FUTURE OF NEWS?

Finally, among French youths we noticed an absence of the words “future”, “act” or “change” being associated with the words “media/press”, whereas this association is markedly more present among young South Africans, Brazilians, Americans and Chinese.

¹² For the sake of readability, the graphic does not show tweets deemed to be neutral (percentage remaining to make up 100, once the positive and negative sentiments have been subtracted). Please refer to the methodology annex for further information.

Owing to the lack of trust in the dominant media outlets, **young people seem to be gradually turning away from them as a primary source of news, preferring instead the social networks, while remaining lucid as to the reliability of the information accessible via these platforms** (see chapter III). Indeed, all young people seem to trust social media more than traditional media.

However, French youths who, proportionally speaking, associate the subject of trust with social media in the highest numbers, are the least categorical on the issue. They almost equally associate the term “fake news” with the terms “media/press” and “social media”, unlike the other nationalities, who use the term more, and sometimes a great deal more, in relation to the dominant media outlets (see figure 5). This French stance is similar to that noted among the international SKEMA students we spoke to at the beginning of the study.

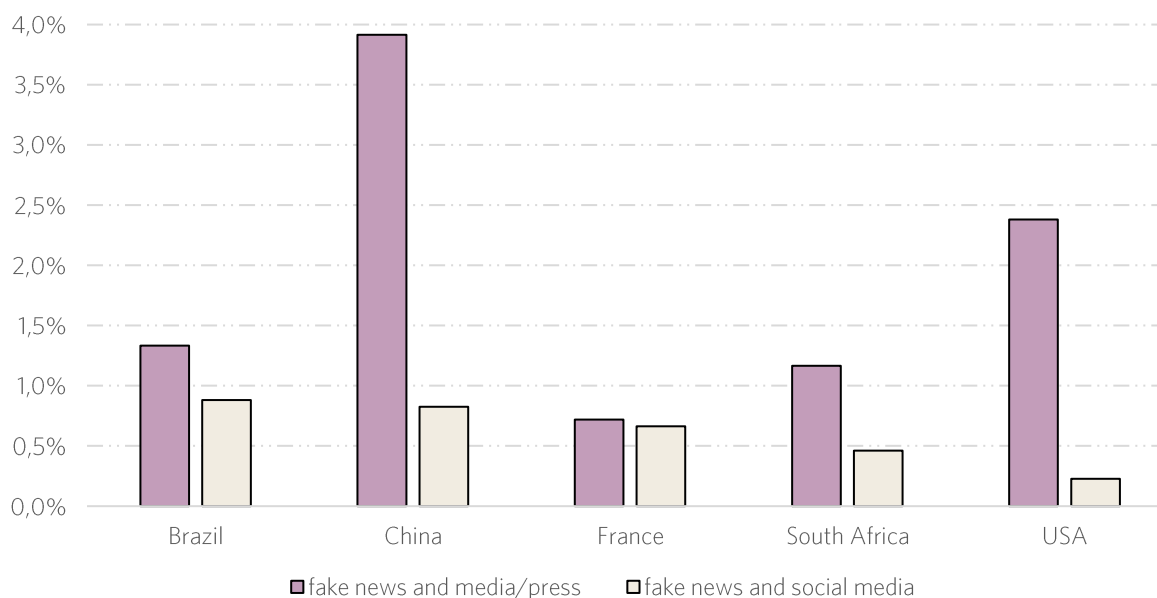


Figure 5: Comparison of the recurrence of the term “fake news” associated with “media/press” and “social media”. Reading: In China, 3.9% of tweets from 18-24 year olds about media or the press mention fake news.

IMPLICATIONS AND INSIGHTS

The concomitance of the fear of fake news and doubt as to the credibility of traditional media, stronger in all young people than it is for social media (although to a lesser degree among French youths), should give the media serious pause for thought, since their advantage over the social networks is precisely that, in theory, they analyse and fact-check information. Do these negative opinions not implicitly call for a greater analysis of data to distinguish the true from the false? Can we take the French result to mean that young people feel their national media do a somewhat better job of this? In any case, it seems clear that the disillusion stems from the suspected presence of false information or even of manipulation (a word that is mentioned less but still present).

Secondly, the strong association between State and media should necessarily raise a red flag with politicians. It would be perilous to conclude that it implies a desire for the State to intervene further in regulating the media. Between censorship and disinformation, is there a place for the State? It is remarkable and rather encouraging that young people spontaneously take up this issue which is crucial in a democracy. Do the initiatives undertaken by certain governments on the qualification and acceptability of information address this concern of young people? Might not the latter wish to have the capacity to assess the truth of the information for themselves? Finally, do they not reproach policymakers for depriving them of this essential training? This point, common to both the traditional media and social media, will be discussed in detail in the next chapter.

CHAPTER III

SOCIAL MEDIA, A LOVE-HATE RELATIONSHIP

SOCIAL MEDIA, A LOVE-HATE RELATIONSHIP

The second most popular theme among the youths of all five countries is social media, mentioned in nearly 12 million tweets by 787,600 young people. The participation rate of young people in the overall conversation is the highest in this theme, with the 18 to 24 age group representing, on average, 20.3% of users who tweeted about the topic. As was the case for the media theme, **young Brazilians and Americans are the most active on this topic**, with participation rates of 22.7% and 20.3% respectively. Chinese, French and South African youths contributed a smaller share of their overall national conversations (ranging from 14.2% to 15.7%).

	number of tweets by young people	number of young people
USA	9 900 000	628 300
Brazil	1 600 000	128 600
France	297 100	20 500
South Africa	132 900	9 100
China	15 200	1 100
Total	11 945 200	787 600

COLLECTIVE APPROACH VS INDIVIDUAL APPROACH

The attitude of young people toward social media is deeply ambivalent and closely tied to the ways they use them. **The social networks are readily used for collective action and activism, with a strong leaning toward political issues.** Within this context, they are associated with the expressions “change”, “act”, “future” in all countries except France, where this association is less present. **Young South Africans and Americans associate the expressions “social media” and “change/act/future” four times more than French and Brazilian youths; Chinese youths do so upward of ten times more.** That said, where the latter are concerned, we feel that drawing analyses from these figures would not be pertinent, since Twitter seems to be the preferred platform of expression of militants and dissidents.

While it is not possible to fully assess this based on the tweets observed (since this point was not precisely explored), social media may be perceived more negatively by young people when it comes to the individual relationship to the platforms, notably in terms of self-image, data protection, and mental health¹³.

This distrust in terms of individual impact had been strongly emphasized in the SKEMA student work groups, and particularly made clear by a Brazilian student. The psychological pressure mentioned was also financial as, according to him, presence on social media meant everyone had to come across as elegant and “rich”. A French student also included concern over the use that could later be made of what they had said on the platforms. Finally, the students questioned the role of social media: are these platforms the instigators of the very low levels of self-confidence some young people suffer from and which can lead to severe depression? The French students were markedly more mindful of whether the information shared and gathered was truth or fiction (fake news).

Although much more minor in terms of occurrences, **#DigitalDetox** illustrates an awareness of the addictive nature of the social networks. The expression is found in tweets by young people in the United States, France, Brazil and China. It refers to a digital detoxification to cure addiction and reflects the sharp rise among 18- to 24-year-olds of a certain unease with regard to the digital sphere and social media.

¹³ The study reveals a significant volume of conversations associating the terms “self-confidence”, “self-esteem”, “self-image”. These topics are especially discussed by French, American, Chinese and South African youths. In the United States, the term “bodyshaming” appears in 52,200 tweets and is mainly used by women (60.2%) (between 1 May 2020 and 30 April 2021).

CENSORSHIP ON SOCIAL MEDIA: THE OMNIPOTENCE OF THE PLATFORMS?

Twitter's decision, in the aftermath of the Capitol invasion by Donald Trump supporters, to ban the outgoing president from its platform sparked a fierce global debate about freedom of speech and the censorship power of social media platforms (see chapter V). This debate was crystallized by the use of the following hashtags: *#TrumpBan*, *#TrumpBanned*, *#BanTrumpSaveDemocracy*, *#TrumpTwitterBan*, *#JeSuisDonaldTrump*, *#TwitterCensure*, *#Censuranotwitter*.

As a sign of protest against censorship, young people sometimes boycott the platforms temporarily or permanently. Among young Brazilians for example, *#SilenceDay*, the eighth most popular hashtag relating to social media (with some 1,300 tweets), calls on web users to stop posting on the social networks for 24 hours.

A strong negative sentiment emerges from the association of the expressions “social media” and “news”. However, **it is not as strong as that associated with traditional media** in all countries except China, where 45.1% of tweets about social media are negative (see figure 6) versus 39.1% of those about traditional media (see figure 4). Likewise, the social networks give rise to a more pervasive positive sentiment, except once again in China.

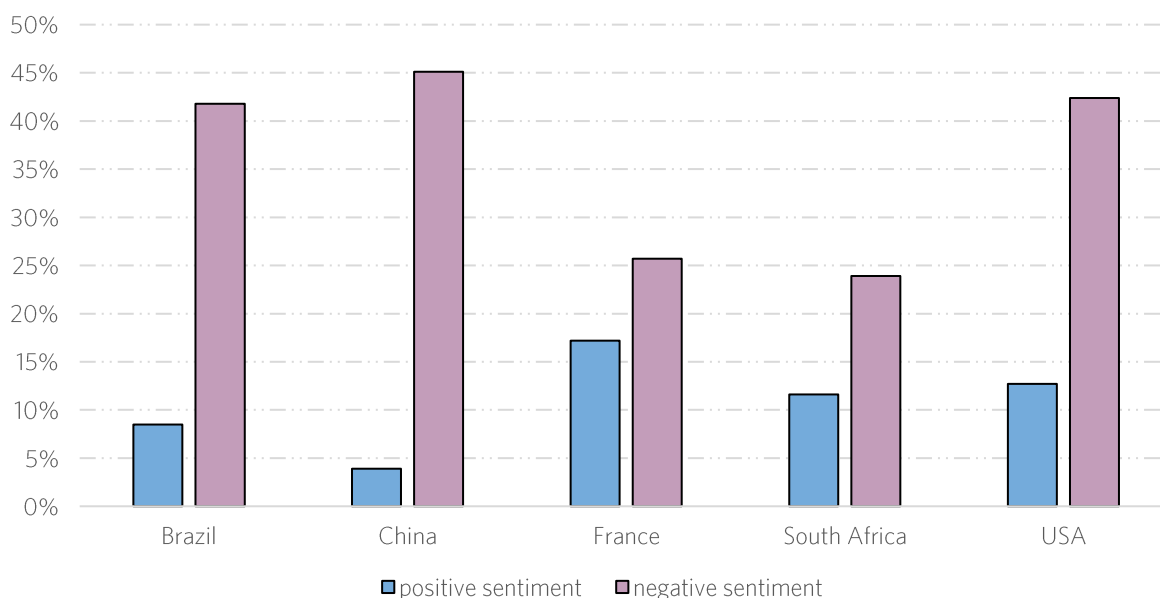


Figure 6: Sentiment of young people's tweets containing the words “social media” and “news”.

THE STATE AS REGULATOR?

As is the case for the traditional media theme, it is striking to see that here too, for young people in all five countries, **the words “State/government” are the first to be associated with the social media theme**. In China, this association represents 19.1% of all tweets on the theme; in France, close to 2.3%.

Young people seem to expect the State to intervene more in these matters in order to guarantee privacy and data security. However, they find the power of surveillance these platforms offer the State just as frightening.

The SKEMA students are concerned about the growing importance of social media in the political arena. This situation could require more suitable regulation in order to channel the disinformation and avoid individuals becoming locked into their own version of reality.

In Brazil, the debates of young people focus on the Internet Freedom, Responsibility and Transparency Bill under the hashtag *#PL2630Nao* – no to Bill 2630 –, the sixth most widely used hashtag of the theme (1,400 tweets). The Bill, which was being read in Parliament at the time, aimed to reduce disinformation. It was widely criticized for different reasons, and NGOs (Amnesty International and Human Rights Watch, for example) but also the social media giants and the government camp perceived it as encroaching on freedom of speech.

The extraterritoriality of the issues also manifests itself among American, French and Chinese youths, who seem to take an interest in how regulations evolve beyond their borders. In the United States, *#saveanonymity* (48th hashtag) and *#SayNoToSocialMediaBill* (54th) respectively refer to the political debates taking place in the United Kingdom and Nigeria. In France, the issue of *#anonymat* (anonymity, 87th) is also discussed. In China, several tweets with high engagement rates discuss American legislation in this area.

IMPLICATIONS AND INSIGHTS

The debates about the harmful nature of social media reflect the more general debate occurring within the entire population. The significant mention of mental health may be due to the context of isolation resulting from the COVID-19 crisis, which has weakened the psychological state of young people in particular. This issue has since been developed, notably by a former Facebook employee turned whistle-blower

While they did not express it specifically, the youths are well aware of several major issues to which they seek to draw the attention of policymakers through their words: the prevention of internet addiction, the preparation of young people for social media use, and the regulation of freedom of speech.

This is what they genuinely want from the political decision makers in charge.

First of all, how do young people form their political opinions when social media tends to create information “bubbles” that keep them in an echo chamber, exposes them to a substantial flow of information, and imposes a faster reading speed? One might legitimately question whether this situation is truly new (or not) compared to that which prevailed prior to the advent of social media. While the accentuation of this phenomenon is a reality, its creation by social networks can be questioned.

Given the concern voiced over fake news, training in critical thinking seems crucial. We learn to analyse information at a young age, as pointed out by the work groups of SKEMA students, who noted having learned it from their families rather than in school. The public authorities concerned should very seriously consider generalizing existing training to all from a very early age.

CHAPTER IV

SECURITY, TO EACH THEIR PRIORITIES

SECURITY, TO EACH THEIR PRIORITIES

Overall, security is the third most popular theme, with a volume of 10.3 million tweets published by nearly half a million young people. Security issues mobilize young Chinese and Brazilians the most, and Americans to a lesser extent. These three youths represent 20.4%, 19.7% and 16.3% of their national conversation respectively. In France and South Africa, youths only account for 13.9% and 13%.

	number of tweets by young people	number of young people
USA	8 400 000	376 500
Brazil	1 100 000	73 400
France	467 800	27 000
China	289 700	16 100
South Africa	89 800	6 400
total	10 347 300	499 400

Combining the terms “State/government” and “security” reveals a large volume of tweets in all five countries studied, which simply **reflects the role of the State in this area**. Over 20% of Chinese tweets on the theme of security mention the State or the government. This percentage reaches 14.4% in South Africa. France, the United States and Brazil culminate at around 5.5%.

However, the interpretations and associations of the term “security” must be examined according to the country. It appears that the young people observed view security through three lenses: physical security, socio-political security, and freedom.

PHYSICAL SECURITY

Within the SKEMA student work groups, the question of physical security was especially mentioned by the French and Brazilian youths and by the women. Notably, they wanted a more effective implementation of policies to reduce sexist violence. On Twitter, **violence against women is a topic of great concern**. Indeed, it is a prominent topic among French and Brazilian youths (*#justicapormarifer*, the sixth most widely used hashtag for this theme, refers to a young woman victim of rape).

One South African concern, specific to Boer youths (4,600 tweets in the 18 to 24 age group¹⁴) mentions the recurrence and the extreme violence used by criminals when attacking farms. This is not just an individual issue, it is also a political one.

SOCIO-POLITICAL SECURITY

In China, Brazil and France, debates about the laws relating to national security are the most engaging. In China, *#HK* (for Hong Kong), in reference to the Hong Kong National Security Law, is the 24th most popular hashtag for this theme. In Brazil, it is the controversy surrounding the use of the National Security Law that dominates, crystallized by the following hashtags: *#BolsonaroGenocida* (Bolsonaro genocide, in fifth place), *#ForaBolsonaro* (Get out, Bolsonaro!, in seventh place), *#DitaduraNuncaMais* (dictatorship never again, 14th), *#TodosContraFelipeNeto* (all against Felipe Neto, 17th)¹⁵ and *#ForaBolsonaroGenocida* (33rd). In France,

¹⁴ From 1 May 2020 to 30 April 2021.

¹⁵ The National Security Law was invoked by the government in March 2021 to have the youtuber Felipe Neto arrested after he accused the Brazilian president of genocide.

#StopLoiSecuriteGlobale (stop the global security law) ranks third and *#PPLSecuriteGlobale* (private members' Bill on global security) sixth.

Secondly, one example of a hashtag with global reach and, no doubt, global influence is *#BlackLivesMatter*, revived in May 2020 following the killing of George Floyd in Minneapolis. Ranking as one of the leading hashtags for this theme in the United States, it became number one in Brazil between April and May 2020, then disappeared from the rankings during our monitoring period (1 July 2020 - 30 June 2021). The extraterritorial reach of concerns is, however, always present. Young South Africans and Americans mobilize against police brutality occurring beyond their borders: *#EndSARS* is the leading hashtag associated with the theme of security in South Africa (5,806 occurrences) and the fourth in the United States (86,270 occurrences).

A third issue is cybersecurity, a topic that is particularly discussed in the United States, with *#cybersecurity* as the eighth most used hashtag for this theme, with 34,100 tweets.

Finally, in Brazil, the security of voting procedures appears as the ninth hashtag for the theme (*#VotoImpressoAuditavelJa*, verifiable printed votes now).

SECURITY AND LIBERTY

The combination of the words **freedom and security** is more popular in Brazil, China and France. In Brazil, tweets associating the two terms represent 14.7% of all tweets on the theme, in China 3.3% and in France 2.5%. These discussions are seen only rarely in the United States and in South Africa, where they represent less than 1% of the theme. Furthermore, Brazil is the only one of the five countries where the association with the word "freedom" is more significant, by far, than the association with the expressions "State/government" (5.8%).

DO YOUNG AMERICANS AND SOUTH AFRICANS HAVE AN INTERNATIONAL OUTLOOK?

It would seem that security within their national borders is not the only concern of young Americans and South Africans. Indeed, the ranking of the most popular hashtags indicates **that they are more enthusiastic about events taking place outside of their own country.**

In the United States, eight of the ten most popular hashtags refer to events outside of its frontiers: *#WhatsHappeninginMyanmar* (825,500 occurrences), *#Myanmar* (541,200), *#MilkTeaAlliance* (468,200), *#EndSARS* (86,300), *#AntiFascistRevolution2021* (48,900), *#May20Coups* (27,000) and *#April19Coups* (22,300)¹⁶. The volume of these discussions represents nearly a quarter of all the tweets of 18- to 24-year-olds on the topic of security. In comparison, the hashtags relating to the pro-Trump riots and the Capitol attack, *#AnatomyofCapitolAttack* (12,700), *#CapitolRiots* (6,100) or *#SeditionHunters* (7,300) represent just 0.16% of the volume of tweets, and this even though the events generated a considerable increase in the volume of messages associated with security in January 2021.

The trend is similar in South Africa. *#EndSARS* (5,800), *#Burma* (5,800), *#MilkTeaAllianceMyanmar* (1,800) and *#MilkTeaAlliance* (1,200) feature in the top ten for the security theme and represent 18% of all tweets published by the 18 to 24 age group.

Do these observations reflect a growing interest among young Americans and South Africans in what is happening beyond their borders? Rather, might the highly political nature of the hashtags mentioned above reflect a certain performative activism¹⁷, as was the case when the *#BlackLivesMatter* temporarily went viral in the spring of 2020? Might we imagine that the further away an event is from one's own country, the more troubling it seems because it is not controlled/controllable?

¹⁶ These hashtags appeared/reappeared when the military junta seized power in Myanmar.

¹⁷ Performative activism is an occasional political stance taken online, motivated by the desire to garner social recognition by participating in a viral trend rather than by genuine conviction.

WHAT ABOUT HEALTH SECURITY?

As it turns out, there is little discussion on this topic, except among French and Brazilians youths. In France, #COVID19 is the second most popular hashtag for this theme, with 5,900 occurrences. In Brazil, the conversation appears in the context of disagreement over the management of the pandemic, deemed catastrophic by a large portion of the population. Among young people, *#Covid-19* and *#29MForaBolsonaro*¹⁸ are the eighth and 10th most frequently used hashtags. The 18 to 24 age group was particularly mobilized on the question of going ahead with ENEM, the national high school exam, with *#AdiaENEM* (postpone ENEM) as the second most frequent hashtag for that theme in a context of health insecurity.

IMPLICATIONS AND INSIGHTS

The security issue appears to take many forms and the approach differs greatly depending on the country. The dimension of extraterritoriality and thus of influence is particularly notable with this theme. But it should be analysed carefully: can one speak of influence when it is only fleeting? Could one also suppose, although a measurement of the phenomenon seems unattainable, that the conveyance of these opinions has left traces and will eventually be expressed again in other forms?

At the same time, this theme is very much tied to national political, social and cultural aspects, and it would seem that in the first instance responsibility is laid squarely at the feet of national policymakers.

¹⁸ This hashtag refers to the nationwide protest on 29 May 2021 against the management of the COVID-19 crisis by the Brazilian government.

CHAPTER V

NEW TECHNOLOGIES, A RESERVED ATTITUDE

NEW TECHNOLOGIES, A REVERSED ATTITUDE

For this vast and highly diverse theme, we chose to focus on concrete approaches to two terms: GAFA¹⁹ and artificial intelligence (AI), to avoid overly broad opinions. These were also two expressions that kept coming up in the discussions of the SKEMA student work groups.

The topic of new technologies in itself is not the most discussed by young people. Concerns and sentiments emerge when certain keywords and names are used (see below Elon Musk). **The theme mobilizes Chinese and Brazilian youths the most.** Respectively, they represent 18% and 17.7% of national users tweeting on the topic. Conversely, American, South African and French youths seem less invested, with rates of representation in the overall conversation of around 10 to 11%.

	number of tweets by young people	number of young people
USA	113 300	9 400
China	77 700	4 700
Brazil	34 800	3 300
France	25 300	2 300
South Africa	1 300	363
total	252 400	20 063

Incidentally, an ancillary search on the mention of Elon Musk in five countries shows that he generates more tweets than the AI and GAFA tweets combined, everywhere except in China. Named Time magazine's 2021 Person of the Year, he is perceived negatively everywhere, although less so in France where opinions are more divided (see figure 7).

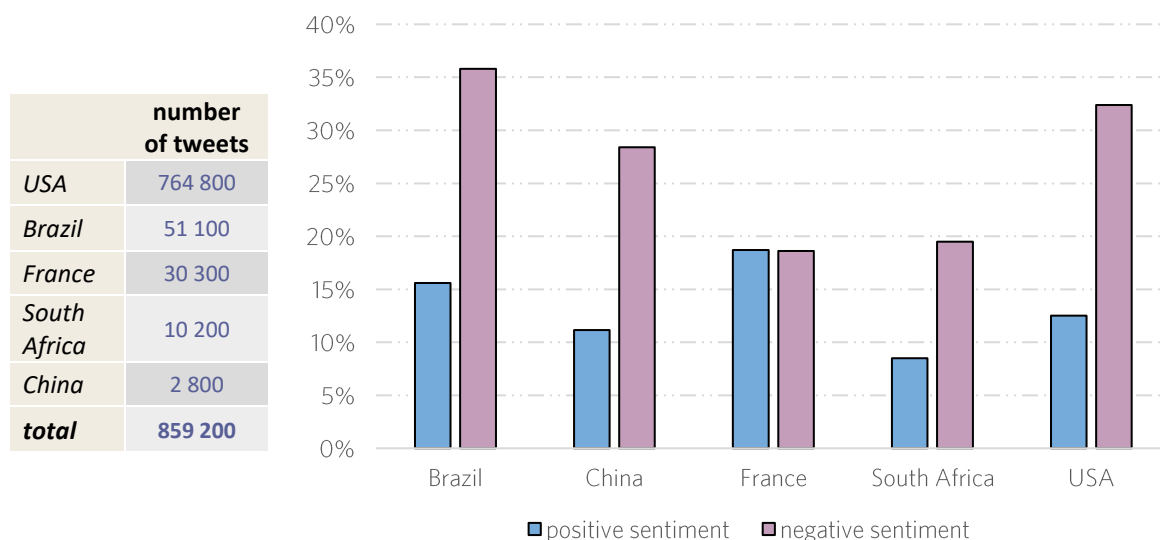


Figure 7: Number and sentiment of tweets published by 18- to 24-year-olds about Elon Musk.

¹⁹ Since the term “GAFA” does not exist in Chinese, the separate terms “Google”, “Amazon”, “Facebook” and “Apple” were used when analysing this theme for China only.

OVERALL, ARTIFICIAL INTELLIGENCE GARNERS MORE INTEREST THAN GAFA

Issues connected with artificial intelligence are more popular among Brazilian and American youths than those related to GAFA. Of all tweets containing the expressions “artificial intelligence” or “GAFA”, 97.1% for Brazil and 96.4% for the United States were devoted to AI. GAFA appeared as a minor topic of conversation for young people in these two countries (see figure 8). An analysis of the hashtags most used across tweets containing the expressions “GAFA” or “artificial intelligence” supports this conclusion. In the United States, the two most frequently used hashtags are #AI and #ArtificialIntelligence. In Brazil, #AIThreadBR (artificial intelligence thread Brazil) is in third position and #IA (#AI in English) in sixth. There is no mention of GAFA in the top ten hashtags used by young people in these two countries.

In the United States, the conversations about AI use technical vocabulary, as evidenced by the most popular hashtags: #MachineLearning (third place), #DataScience (fourth), #100DaysOfCode (fifth), #DeepLearning (sixth), #Python (seventh), #IoT (Internet of Things, eighth), #BigData (ninth), #NLP (Natural Language Processing, 10th). The trend is similar among South African youths, although in much smaller proportions than with young Americans: #python (sixth) and #100daysofcode (eighth).

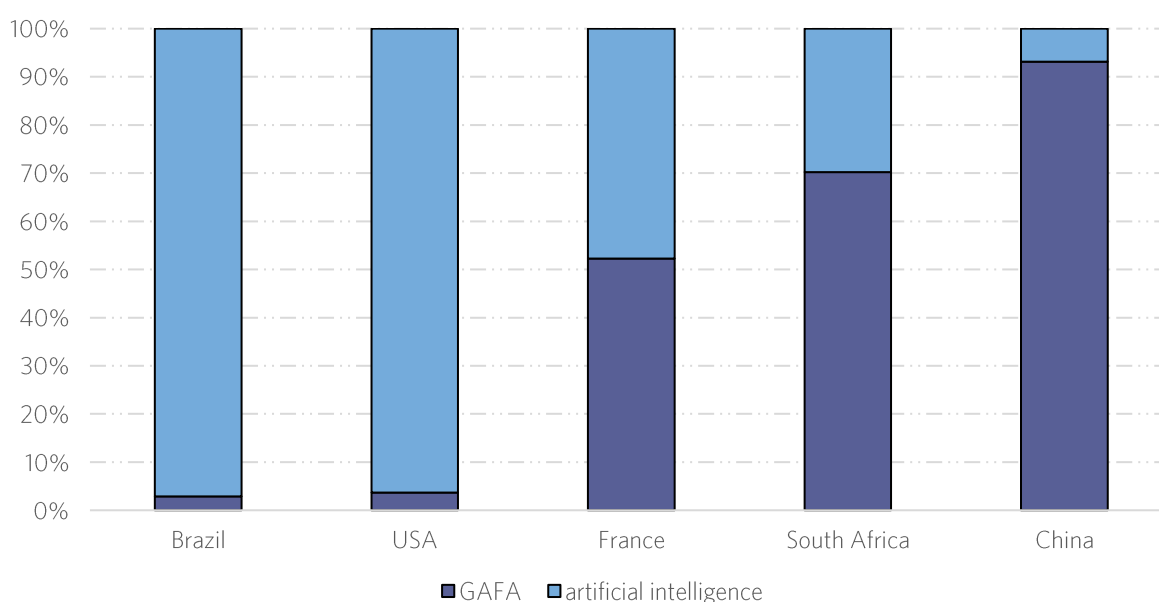


Figure 8: Comparison of the use of the terms “GAFA” and “artificial intelligence” in tweets published by 18- to 24-year-olds²⁰.

ARTIFICIAL INTELLIGENCE AND YOUNG PEOPLE: A MIX OF FASCINATION AND CONCERN

The reactions to AI are rather ambivalent and oscillate between fascination and concern. AI is alternately considered a tool that opens up exceptional opportunities and a manipulation and surveillance solution which poses a potential threat to democracy.

These two approaches are geographically divided. Young Brazilians seem by far to be the most distrustful of AI: 52.2% of tweets containing the expression “artificial intelligence” are negative, while 20.3% are positive (see figure 9). The general sentiment is rather negative among American youths, with 19.9% of tweets being negative and 15.5% positive. **The trend is reversed and more positive among French, South African and Chinese youths.**

²⁰ Percentages calculated based on an ad hoc search for terms in tweets published between 19 September 2020 and 18 October 2021.

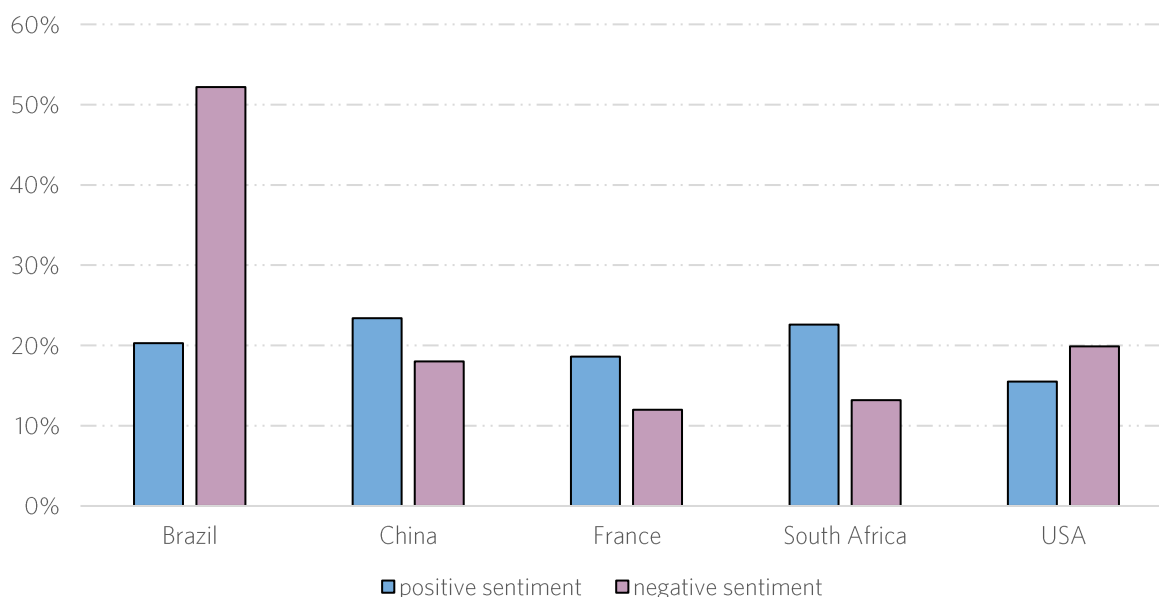


Figure 9: Sentiment emanating from tweets by 18- to 24-year-olds about artificial intelligence.

Issues relating to the security of new technologies are discussed more by South African and French youths. The combination of the terms “security” and “AI/GAFA” represents 3% and 1.3% of the respective conversations. While these percentages may be low, they are markedly superior to those of their peers in the other countries (around nine times higher for South Africans and four times higher for the French). In the United States, the *#cybersecurity* hashtag ranks 15th for this theme.

Discussions about the future of the new technologies sector are found primarily among Chinese and South African youths; for each of these groups, the volume of tweets represents over 6% of the theme. In the United States, young people talk about the place of women in the development of new technologies. *#WomenWhoCode* is the 19th most frequently used hashtag and *#WomenInTech* the 25th.

GAFA ARE DEEMED ALL-POWERFUL AND ARE NOT VERY WELL LIKED: AN AREA OF CONCERN FOR THE FRENCH AND CHINESE

The hashtag analysis shows that, unlike their peers, **French youths are comparatively more concerned about issues relating to GAFA than those relating to AI.** *#GAFA* is the most widely used hashtag in France with 2,900 tweets, ahead of *#IA* (*#AI* in English) which comes in second with 1,900 tweets. GAFA are criticized in France, where more than a quarter of tweets mentioning them have a negative connotation (see figure 10). This negative sentiment is also perceived in China and the United States, but to a lesser extent. The general sentiment is more mixed in Brazil and South Africa, where the proportion of tweets with a positive connotation is greater: 18.3% among young Brazilians and 19.1% for young Americans.

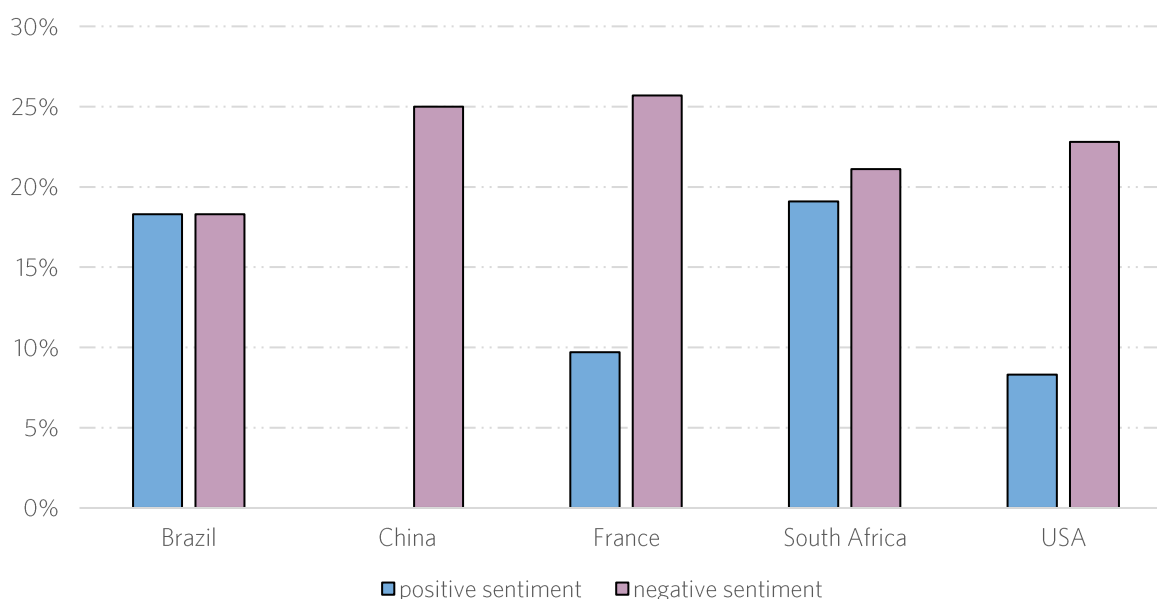


Figure 10: Sentiment emanating from the tweets by 18- to 24-year-olds about GAFA.

China and France are the two countries where the question of trust in new technologies is the most discussed.

Unsurprisingly, complaints about the management of personal information are at the heart of conversations, but in both countries **freedom of speech, the censorship power of GAFA, and the challenges in regulating them** are the issues where the debates are the most engaging. In France, and especially in China, the association of the terms “AI/GAFA” and “freedom” generates a number of tweets that is proportionally significant: 33.3% in China and 4.3% of conversations in France. In France, *#Trump* is the third most popular hashtag for the new technologies theme, *#TrumpBanned* the fourth, *#censure* (censorship) the 12th, and *#trumpban* the 19th. They are absent from the top ten hashtags for the theme in the United States.

In terms of volume, the combination of the terms “State/government” and “AI/GAFA” is significant, particularly in China and France once again. This association represents more than half of tweets by Chinese youths about new technologies, and 6.3% of tweets by young French people. The most engaging tweets are mainly focused on the new balance of power between States and GAFA.

IMPLICATIONS AND INSIGHTS

Our study reveals a certain ambivalence among young people, where surveillance and manipulation are concerned for example. However, the picture is much more complex.

The supposed fascination of young people with artificial intelligence or GAFA and the “gurus” of new technologies is very relative. Feelings about AI are very mixed, with an almost equal share of negative and positive, and even very negative feelings among young Brazilians. This subject, and particularly the future of the sector, raises many questions for all youths. This great ambivalence should lead policymakers to examine their methods for implementing their development plans for new technologies, a subject that is a great deal less consensual than they sometimes imagine, including among young people. How are these debates broached with young people being trained in these areas?

The positions regarding the role of the State in the regulation of new technologies do not reveal a consensus among young people. The association of these terms with the concept of freedom, particularly evident in France and China, can perhaps be explained by the importance of the role of the State – in very different forms of course – in these two countries, leading to a greater awareness. This should urge all the States to consider the balance between regulation and freedom, as underlined by these young people.

CHAPTER VI

YOUTHS AND THE WORLD OF WORK, A RELATIONSHIP THAT NEEDS MENDING

YOUTHS AND THE WORLD OF WORK, A RELATIONSHIP THAT NEEDS MENDING

Overall, young people discuss the world of work less than they do the other themes, as demonstrated by the modest volume of tweets observed over the study period. Just 53,200 tweets containing the words “world of work” or “working world” or “professional world” were published by 4,900 young people between 1 July 2020 and 30 June 2021. **Chinese youths are those who speak about this theme the most, followed by the French.** Their combined tweets represented more than three quarters of the total volume of tweets across the five countries studied. Surprisingly, young Americans feel less concerned by this theme; the engagement generated by the messages published is low and only rarely surpasses 300 interactions. In comparison, the word “unemployment” is much more widely used (3.2 million tweets), except in China. **Thus, where the world of work is concerned, young people seem primarily to discuss its risks.**

	number of tweets by young people about work	number of young people tweeting about work	number of tweets by young people about unemployment
<i>China</i>	21 400	1 200	10 800
<i>France</i>	20 000	1 900	164 300
<i>USA</i>	9 200	1 500	2 600 000
<i>Brazil</i>	2 200	225	340 300
<i>South Africa</i>	373	38	47 000
total	53 173	4 863	3 162 400

Chinese and Brazilian youths are the most present in their national conversation. They respectively represent 18.8% and 16.1% of users of their nationality who talked about this theme. Young South Africans, on the other hand, make up barely 7.5% of talk about the world of work. This lack of engagement can be explained by an extremely high unemployment rate of around 75% in under-25s²¹. However, they are the first to associate the terms “State/government” with the theme (8% of the conversation), as well as the word “future” (10.7%). This is clearly symptomatic of anxiety about their professional future. #Forabetterworldofwork and #FutureOfWork are some of the most popular hashtags for this theme. The South African results should be viewed relative to the small number of tweets on this theme.

THE WORLD OF WORK IS A SOURCE OF ANXIETY AND DISAPPOINTMENT

Analysis of the sentiment in tweets containing the terms “world of work/working world/professional world” shows that 36.8% of the tweets published by French youths have a negative connotation, versus 21.9% of positive tweets (see figure 11). Furthermore, the recurrence of the term “hypocrisy” in the most engaging French tweets is interesting. The topic of salaries mobilizes them (second most recurring hashtag). The trend is similar in China, where 31.6% of tweets are negative, versus only 10% that are positive.

Feelings are more mixed in Brazil. Young Americans and South Africans are the only ones to see the world of work in a positive light (35.2% and 31.8% of positive tweets respectively). Nonetheless, Young Americans talk about the difficulties encountered by minorities. Many also talk about change and the future: #FutureOfWork is the leading hashtag for this theme.

The SKEMA students reflected on the role of schools in preparing for the world of work and underlined the need for training in both hard and soft skills.

²¹ According to StatsSA, South Africa’s statistics department, 74.8% of under-25s were unemployed in 2021.

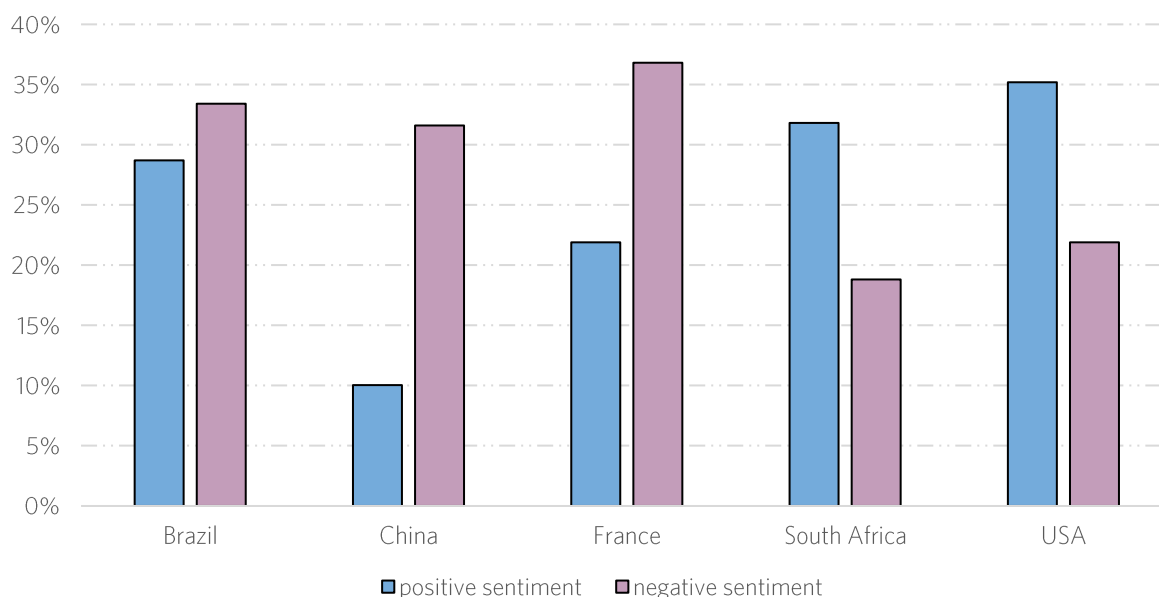


Figure 11: Sentiment of young people's tweets containing the terms "world of work", "professional world" or "working world".

The role of governments is highlighted in these issues. In France and Brazil, the combination of the terms "State/government" and "world of work" represents 2.7% of tweets on the topic (for each of the two countries). This percentage is much lower in the United States (0.9%) and China (0.7%). This is all the more surprising for China, where the terms "State/government" are systematically associated in large numbers with the other four themes. However, along with South Africa, it is the only country where the association is more common than that of the terms "companies" and "world of work". In France, the United States and Brazil, the word "companies" is used more regularly (8.5% in France, 4.1% in Brazil, and 1.4% in the United States).

YOUNG PEOPLE HAVE A NEGATIVE PERCEPTION OF THE CORPORATE WORLD

The youths of all five countries studied are unanimous in their very negative perception of the corporate world. In South Africa, Brazil and the United States, around 48% of tweets containing the word "companies" are negative. This percentage drops to 36.8% for France and 34.1% for China (see figure 12).

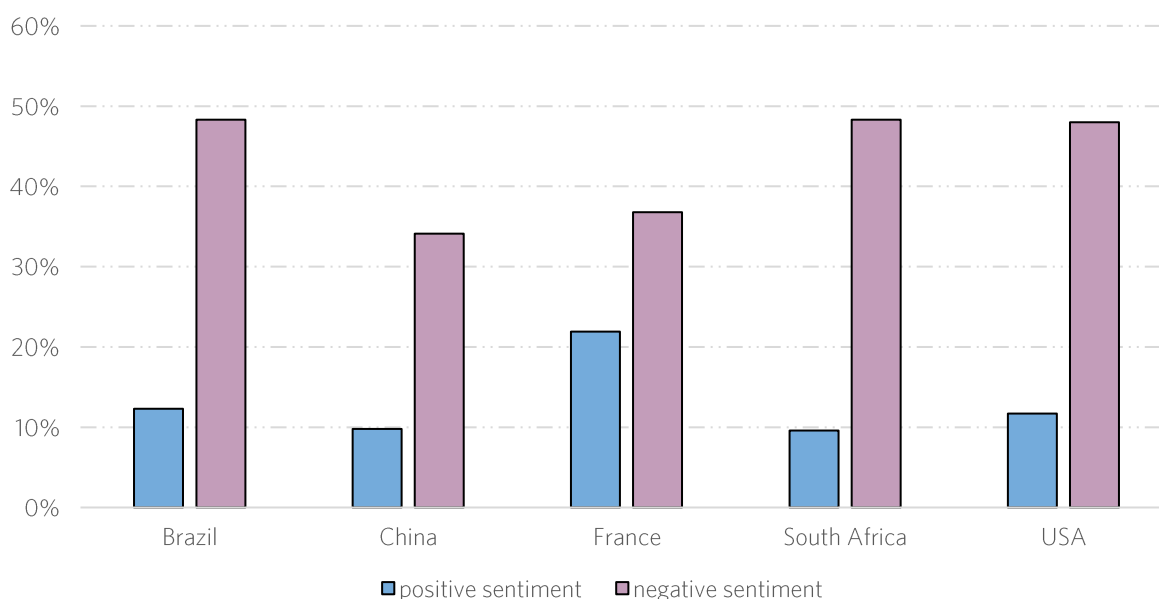


Figure 12: Sentiment of young people's tweets containing the word "companies".

The judgements of 18- to 24-year-olds regarding the corporate world are sometimes linked to ethical concerns. While it is more widely used by American and French youths, the **#Greenwashing** hashtag is symptomatic of this perception.

Surprisingly, start-ups are seldom discussed by young people in their conversations about the world of work. On the specific French topic of the “Start-up Nation”, 8,100 tweets were identified in France; 27.9% of those were negative and 15.6% were positive (from 1 May 2020 to 30 April 2021).

IMPLICATIONS AND INSIGHTS

The analysis of the tweets on this theme shows that entering the workforce is a source of anxiety. Moreover, the negative perception of the corporate world shared by all young people warrants serious attention. It is possible that it is simply a manifestation of this anxiety. Nevertheless, it remains a major issue for companies and for States in their role as regulator of labour relations. It alerts us to the radical changes occurring in attitudes toward work and to the need to adapt practices.

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AUTHORS

The EYES 2021 report is the result of a multidisciplinary collective effort coordinated by Claude Revel, Director of the development of SKEMA PUBLIKA, global strategic intelligence expert, political scientist, essayist, former professor affiliated with SKEMA and part-time lecturer at Sciences Po, author of numerous publications in the field of geopolitics and international relations, and inter-ministerial delegate for economic intelligence under the French Prime Minister from 2013 to 2015.

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The opinions expressed in this report do not necessarily reflect theirs.

The report was produced with the participation of Antidox, a consulting firm recognized for its expertise in communications strategy and specialized in complex online influence issues.

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METHODOLOGY ANNEX

The EYES 2021 report is the result of research work carried out in two phases. A first phase, consisting of interviews conducted with SKEMA Business School students, took place from September 2020 to March 2021 and enabled the identification of five major themes of particular importance to young people. The second phase of the study consisted in the large-scale monitoring of a social media platform. The results of this work, carried out by our partner Antidox, were used for this report.

PHASE 1: METHODOLOGY USED FOR THE SKEMA STUDENT INTERVIEWS

With the aim of identifying the issues of major concern to young people, between September 2020 and March 2021 we gathered 36 students from SKEMA's French, American, Brazilian and Chinese campuses, including 21 women and 15 men of 10 different nationalities: American (2), Belgian (1), Brazilian (2), Chinese (3), French (17), Gambian (1), Indian (5), Italian (3), Romanian (1), and Senegalese (1). These students had volunteered to take part in the consultations, in response to a call put out via the campus and programme directors. The exchanges, held either in person, by video conferencing or by email, took place in two rounds: the first from September to December 2020 and the second from January to March 2021. Two or three interviews were conducted for each group.

During the first round of interviews (from September to December 2020), the SKEMA PUBLIKA team met with 19 male and female students from the French campuses, broken up into groups according to their course of study (4 Grande Ecole programme, 5 Bachelor and 10 MSc). The French students at pre-masters level, who were the first to be gathered in October 2020, were invited to answer the introductory question: ***"What are your eight biggest concerns for the next ten years?"*** The relative convergence of points of view led us to retain the issues mentioned in order to test them out with more international English-speaking groups of different levels (Bachelor and MSc), including Brazilians, Indians, Chinese, and Americans.

The participants were then asked to write out the questions they would like to ask young people, in relation to their major issues of concern mentioned during the first interview. The many verbatim answers enabled us to identify the following major issues of concern:

- Globalization, sustainability, standardization
- Environment, behaviours, norms.
- Institutions, privatization, digitalization.
- Health crisis, movement, regulation.
- News sources, social media, influence.
- Anxiety, security, mobility, freedoms.
- Internet, impact, uses, addiction.
- Education, values, transmission.

During the second round of interviews (from January to March 2021), the SKEMA PUBLIKA team met with 17 male and female students, broken up into groups according to their campus: two students from the Brazilian campus, two from the Chinese campus, six from the American campus, and seven from the French (Grande Ecole programme). The results of the first round of interviews were presented. Most of the participants could relate to the key themes selected by their peers. We then asked them to formulate the questions policymakers should ask themselves in relation to the major issues mentioned earlier. The participants had the possibility of responding orally or anonymously in writing. This work enabled us to enrich our list of keywords.

In March 2021, we finally classified all the keywords identified during the two interview rounds into six major themes:

- Education, school.
- Environment, generation.
- Internet, social media, media, critical thinking.
- Movement, expression.
- Globalization, regulation, security.
- Health, agriculture, hunger.

Based on these themes, identified by the SKEMA students of different nationalities, we began discussions with our partner Antidox, a consultancy with expertise in social listening. All together, eight themes were selected from a first phase of social listening carried out from April 2020 to May 2021: education, health, environment, identity, news sources, new technologies, security, and world of work.

The five themes providing the framework for the EYES 2021 report were then selected by combining certain criteria: degree to which the theme has been covered by other think-thanks or information producers, SKEMA PUBLIKA inclination for the themes connected with information (media/press and social media), relevance to public policy, desire to focus this first study on a limited number of topics²². This study thus focuses on the five following themes, each relevant to young people and to SKEMA PUBLIKA:

Traditional media/press
Social media
Security
New technologies
World of work

The 36 students who took part in phase 1 also participated in a survey conducted by Antidox during phase 2 in parallel to the social listening.

PHASE 2: SOCIAL LISTENING METHODOLOGY USED BY ANTIDOX

The EYES report draws on data collected by Antidox (a consulting firm recognized for its expertise in communications strategy and specialized in complex online influence issues) during the monitoring of a social media platform. The goal of this study commissioned by SKEMA PUBLIKA was to map the opinions, points of view and major areas of concern of young people aged 18 to 24 in the five countries where SKEMA Business School has campuses, namely Brazil, China, France, South Africa, and the United States. All the data in the study was gathered from the social media platform Twitter over a one-year period beginning on 1 July 2020 and ending on 30 June 2021, using Talkwalker, a well-known AI-driven social listening tool.

Several factors drove Antidox to choose Twitter as the data source. First of all, the platform has the advantage of offering content that is largely public and visible to all. Users have the option of restricting access to their profile and posts (protected tweets), but in practice very few people use this feature²³. Additionally, since the posts are text-based and relatively short (280 character limit), the content is easier to analyse. Second, Twitter appears to be a popular space for expressing and debating ideas. The platform boasts 206 million active users around the world²⁴. It is widely used in four of the five countries studied (Brazil, France, South Africa, United States), with user numbers ranging from 2.3 million in South Africa to 73 million in the United States. Twitter is especially popular with web users in the United States and Brazil, the first and fifth leading countries based on number of users in 2021²⁵.

²² The views on issues concerning the environment and identity were extremely divergent and would have warranted an analysis focused solely on them. For this reason, we omitted them from this first version of the project.

²³ In 2019, 13% of Americans had a private Twitter profile. Source: [Pew Research Center](#).

²⁴ Statista data, second quarter 2021.

²⁵ Statista data, July 2021.

	number of Twitter users
USA	73 000 000
Brazil	17 250 000
France	9 050 000
China	3 850 000
South-Africa	2 280 000

Source: Statista, July 2021.

Users in the 18 to 24 age group are well represented on Twitter and make up 17.1% of total users²⁶. This figure is also representative of the portion of young people in each of the countries selected. Indeed, young people represent 16,8% South-Africans, 16,1% of Brazilians, 12,9% of Americans, 11,9% of French people, and 11,5% of Chinese people²⁷.

The aggregate of the data collected for this study shows that Twitter is a popular platform for expression among young people. Young Brazilians seem to make up a larger share of the age distribution, since they represent nearly 21% of their country's Twitter users who expressed views on one of the five themes we selected. This figure drops to 19% for the United States and China. Young people are slightly less represented on the platform in France (14.5%) and South Africa (13.9%).

	number of young people	portion of young people
USA	2 315 700	19 %
Brazil	318 725	20,9 %
France	99 300	14,5 %
China	33 200	18,8 %
South Africa	32 801	13,8 %

Number of 18- to 24-year-olds and portion of 18- to 24-year-olds among Twitter users who expressed views, all themes combined (medias/press, social media; security, new technologies, work) between July 2020 and June 2021. Source: Antidox.

The study uses a double-pronged quantitative and qualitative approach. On the one hand, it looks at the portion of young people in each country that express views on each theme, and on the other hand it qualifies the nature of the conversations, as well as the trends and opinions emerging from them. The monitoring thus consisted in first identifying keywords representative of the five themes, to gauge their importance in each country. The recurrence of these thematic keywords was then cross-referenced against a set of keywords applicable to all themes, categorized according to three key questions that would shed light, where possible, on the nature of the conversations taking place:

- To what extent do 18- to 24-year-olds trust the current systems and ways of functioning? **Keywords: respect, trust, distrust.**
- How do they perceive the role of the State? **Keywords: public policies, state, government, regulation, political party.**
- What changes might they like to see? **Keyword: act, change, future.**

Specific keywords were also chosen for each theme. The words were chosen in French (France), then translated into English (South Africa, United States), Brazilian Portuguese (Brazil), and Chinese (China). We acknowledge

²⁶ Statista data, April 2021.

²⁷ Data from [The World Factbook](#), Central Intelligence Agency.

that biases may arise from this translating process and that the keywords chosen in English, Brazilian Portuguese and Chinese might hold different realities than the French words.

themes	associated representative keywords	associated specific keywords
<i>traditional news sources</i>	media, press	democracy, fake news, freedom of thought, freedom of speech, news
<i>social media</i>	social media	self image, self esteem, identity building, self confidence, personal development, social connection, news
<i>new technologies</i>	artificial intelligence, GAFA	liberty, security
<i>security</i>	security	liberty, mobility
<i>work</i>	world of work, working world, professional world	management, companies, leadership, way of working, startups, salaries

Keywords in English.

We identified a few potential biases in our study. The first is connected with the Twitter platform itself, since its tweet limit of 280 characters can hinder the development and expression of complex and nuanced thought. However, this limitation is offset by the increasingly widespread use of “threads” or “tweetstorms”, a series of connected tweets posted by a same user. These can be read sequentially and enable users to expand on the ideas and views expressed.

In addition, since Twitter is a platform for expression and information sharing in real time, the content and opinions expressed on the platform remain extremely dependent on current events. The use of hashtags in particular is often seasonal, but their more or less intensive dissemination on social media and their links to the five issues reveal unique insights.

Granted, we could question the over-representation of negative points of view inherent to social media posts in general and perhaps at times also imperfectly measured by the tool used (see below) but placing certain formulations in context with the earlier statements made by the SKEMA students often enabled us to balance them or confirm them.

Finally, the data relating to the age and nationality of Twitter users and included in this study are self-reported and rely on user honesty. Talkwalker allows filtering of tweets to isolate those posted by 18- to 24-year-olds. This filter is based on the information provided by the users directly on Twitter and, when possible, on an analysis of their profile picture.

The second bias is linked to the degree of representativeness of Twitter users relative to national populations.

On this subject, [a study conducted in the United States in 2019](https://doi.org/10.1177%2F0894439316671698) by the Pew Research Center concluded that Americans using the social network are “younger and more likely to be Democrats than the general public”. In a 2016 study, a researcher at the Oxford Internet Institute, similarly found that, in the United States and in Great Britain, “Twitter users are disproportionately members of elites”. They are younger and wealthier, and therefore not representative of the overall population. He concludes that Twitter data are not suitable in contexts such as “forecasting elections or gaining insight into attitudes, sentiments, or activities of large populations”²⁸. Conversely, the results of a study conducted in Brazil in the run-up to the 2014 presidential elections show that Twitter remains a suitable source of information for identifying voting intentions. Indeed, the authors of the study showed that performing sentiment analysis on tweets yielded approximately the same accuracy as traditional opinion polls²⁹. If Twitter is not always representative of societies as a whole, it is at least representative of the spectrum of arguments.

²⁸ Blank, Grant. (2016). The Digital Divide Among Twitter Users and Its Implications for Social Research. Social Science Computer Review (SSCR), 2017, Volume 35 Issue 6: 679–697. <https://doi.org/10.1177%2F0894439316671698>.

²⁹ Oliveira, Daniel José Silva ; Bermejo, Paulo Henrique de Souza & dos Santos, Pâmela Aparecida. (2017). Can social media reveal the preferences of voters? A comparison between sentiment analysis and traditional opinion polls. Journal of

While the fact that Twitter is not used by a majority of the population is an inherent methodological limitation common to all the countries studied, China presents several particularities requiring clarification. Indeed, Twitter is officially blocked there, which explains why its use is marginal. In fact, Chinese people tend to favor Chinese social networks, such as Weibo. Chinese users of Western social networks are thus limited either to web users residing outside of China or to those using a VPN for geo-spoofing (simulating an IP address outside of China to gain access to the platform). We may assume that these web users are better educated and socially privileged. Our analyses took into account this situation which we know results in a probable over-representation of negative and diverging opinions. In addition, Antidox identified a great deal of digital noise on several of the study themes in China. Given these limiting parameters, the tool does not always reveal any real trends shaping the discourse of Chinese youths online.

A third bias is more specifically tied to the sentiment analysis of tweets automatically performed by Talkwalker. The tool decides whether a tweet is positive, negative or neutral based on the words it contains. These data are to be considered with caution, because the technology of the tool does not yet detect subtleties in language; in particular, it is unable to discern irony. However, the greater the amount of data, the more reliable the estimation. For the sake of readability, the graphics presented in this report do not show the tweets deemed neutral (genuinely neutral tweets or those which the tool was unable to analyse).

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