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Media Planner
May 7, 2007

'Millennials' Defying the Old Models

Younger Online Consumers Leaning More Toward User-Generated Content

By Mark Dominiak, Special to *TelevisionWeek*

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Among the many events staged during the recent National Association of Broadcasters convention was an April 16 luncheon hosted by Deloitte Development featuring the release of and panel discussion about findings from its 2007 State of the Media Democracy study.

The discussion, entitled "The Future of Media: Profiting From Generational Differences," focused on differences in media behavior across generational segments. Panelists included executives from Ogilvy, Verisign, Media Metrics and Teletrax. For media planners, an understanding of factors that drive behaviors can be useful in planning efforts.

The Study

Conducted by the Harrison Group for Deloitte, the 2007 State of the Media Democracy survey was conducted online, polling

more than 2,200 Americans age 13 to 75. Field work was conducted from Feb. 23 to March 6, 2007. Results were assessed from the perspective of generations rather than demographics.

Data was arranged in four generational buckets: Matures, those age 61 to 75, Boomers, age 42 to 60, Gen X, age 25 to 41, and Millennials (Gen Y), age 13 to 24. While many survey questions concerned new-media behaviors, there also were a number of questions regarding traditional media forms and even word of mouth. The most compelling data in the survey flows from the behaviors of the Millennial generation.

Online Behaviors

Most marketers seem to view online environments as simply another venue in which to extend their traditional marketing messages. Growing awareness, enhancing brand experience, seeking out deeper information about brands or stimulating traffic are common expectations. Millennials, however, do not view the online space in any way, shape or form as a conventional media channel. Their time online has very little to do with brands and everything to do with their own individual pursuits.

According to the survey, Millennials invested 51 percent of their Internet time with user-generated content and only 49 percent on company-generated content. The survey average was 34 percent of time to user-generated content and 66 percent to company-generated content. Millennials, therefore, invest 50 percent more time with user-generated content than the average user.

In the traditional marketing space, content consumption generally facilitates the creation of relationships between people and brands. On the Web, Millennials' content consumption facilitates building relationships electronically between people. In response to the question "How often would you say you are doing the following activities in a typical week?" the interaction-based activities skewed highly:

Sixty-two percent of Millennials said they frequently or occasionally socialized on the Internet, versus 38 percent of the rest of the participants in the survey, a 63 percent advantage.

Other prominent Millennial online activities include watching content created by others: 71 percent vs. 51 percent (+39 percent); reading or posting on message boards: 51 percent vs. 38 percent (+34 percent); reading blogs: 55 percent vs. 36 percent (+53 percent); creating personal content: 58 percent vs. 34 percent (+71 percent); maintaining own personal Web site: 36 percent vs. 22 percent (+64 percent); and keeping a web log (blog): 35 percent vs. 18 percent (+94 percent).

Among the more mainstream Web activities, Millennials invest significant time in the following: searching, downloading or listening to music, 78 percent vs. 50 percent (+56 percent); visiting gaming sites where games can be played online, 66 percent vs. 49 percent (+35 percent); and watching You Tube or other video-streaming sites, 62 percent vs. 36 percent (+72 percent). Further, almost half (48 percent) visit a television Web site in a typical week.

Social Currency

Media definitely seem to provide an important foundation of electronic social interactions. But Millennials' use of media as a social lubricant extends to face-to-face interactions also. When asked which were frequently discussed with friends, family or work colleagues, media outlets enjoyed quite a bit of discussion, with TV surprisingly leading the way.

Favorite television shows were discussed by 83 percent of Millennials with their family and others vs. 79 percent of other age groups in the survey. Promising new TV shows were discussed by 46 percent. Favorite Web sites, radio programs and promising new Web sites were discussed by 46 percent, 18 percent and 21 percent of Millennials, respectively.

Word-of-mouth is a strong motivator with Millennials. According to the survey, word-of-mouth is the most common reason for Millennials to visit a Web site. A television ad was the second-most-common reason. Responses to the question, "When you decide to tell people about a particular television show or Web site that you enjoy, how many people do you typically mention it to? Please include telling people face to face, over the phone, IM/texting or e-mail," yielded telling results.

Millennials claim to tell 17.7 people about things of interest to them. In the survey, the average respondent replied at a rate of 9.7, meaning Millennials spread word-of-mouth to 82 percent more people than the average respondent. Media properties enjoy a strong position as hot social currency.

And Millennials apparently show few signs of slowing down their rate of conversation. Of the top five activities Millennials expect to spend more time doing in the coming year, hanging out with friends (35 percent) and hanging out with family members (25 percent) are No. 1 and No. 3, respectively.

Eager for the Future

Millennials also responded favorably to questions about potential devices that would give them even more digital capability. Their eagerness for new technology significantly exceeded the demeanor of the other generations and the survey population in general.

They were 33 percent more likely than the average (64 percent to 48 percent) to agree with the statement, "I would like to be able to easily connect my home television to the Internet so that I can view videos or downloaded content from the Internet on my television, or view anything at all that I have on my PC."

Echoing their affinity for social connections via the Web, Millennials were 68 percent more likely (57 percent vs. 34 percent) to look forward to "an entertainment and communications device that will give me the ability to speak to/IM/text/e-mail anyone I need to contact, take high-quality photos and video, listen to my music, play games and access the Internet."

Millennials are looking forward to even more control of their media choices. They were 54 percent more likely (60 percent vs. 39 percent) than the average respondent to agree they want the ability to "move my music, TV shows, podcasts, movies, etc., to any devices and platforms that I own without any problems."

With technology advances occurring at ever faster rates, it is likely that the preferences of Millennials will have great impact on the future landscape of media. As Millennials become core 18 to 49 consumers, it is highly likely they will continue to crave media characterized by social currency and user control.

Implications

What is it that attracts Millennials to characteristics like social currency and user control? Here's one hypothesis: Millennials may be the epitome of a generation that largely can be described as having had a latch-key childhood. Frequently left to fend for themselves, they're used to being in control. It is not surprising that, when faced with media choices they would gravitate toward media they can control.

Further, in a latch-key type of environment, an online social network fulfills a critical relationship need. Family members may not be present as often, due to work or other circumstances. Social networks step in to fill the relationship void. Technology makes it easier to maintain a network and keep it vital. Any advance in technology that improves the ability to communicate will be seen as a benefit because it facilitates valued relationships.

More control and better technology are classic category-killers throughout case studies in business literature. When consumers are given options in a category that eliminate compromises they had to make, they will quickly evolve to the new choice that does not require the compromise.

With new media, for example, an innovation like the downloading of songs eliminated the compromise of having to buy an entire CD. Being able to load those songs en masse to an iPod eliminated the compromises inherent in radio listening.

Viewing programming online eliminates the compromise of viewing on the broadcaster's terms. Preferred content can be consumed at a time convenient to the user. Further, consuming user-generated content eliminates the compromise of being

forced to choose only mass-media content. Millennials are disposed to take control of their choices, so it makes sense that they have embraced options that take away media compromises earlier generations had to accept.

Deloitte's research demonstrates how the new generation of media consumers is evolving. What may have been disadvantageous life circumstances in their early years actually might have provided Millennials with the skills to take advantage of the compromise-breaking benefits the world of new media provides. Their propensity to share knowledge with everyone in their social network makes them a force to be reckoned with.

For their part, planners will need to understand what makes Millennials tick, respect their skill in controlling media experiences and engineer placements to flourish in environments Millennials embrace. n

Mark Dominiak is principal strategist of marketing, communication and context for Insight Garden.

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TV RATINGS

A screenshot of a 'Weekly Prime-Time Ratings' chart. The chart is organized into two main sections, one for Monday and one for Tuesday. Each section contains a table with columns for program names, time slots, and various rating metrics. Small thumbnail images of the programs are included in the first column of each table.

Monday	Tuesday																								
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[Weekly TV Ratings Chart](#)

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