
AUGUST 2015

INTRODUCING THE GEN-NARRATORS

A global research project exploring the media habits, attitudes and behaviours of influential Millennials in 2015 - Global findings and data

A blurred background image of a modern office hallway with large glass windows and people walking. The image is out of focus, emphasizing the text overlay.

“Millennials will be the
**LARGEST GENERATION IN
THE WORKFORCE in 2015...**

This is the year Millennials
claim their place in the global economy”.

(Fast Company, 2014)



By 2017 Millennials will have
THE MOST SPENDING POWER
of any generation.

MILLENNIALS ARE... MISUNDERSTOOD

4



AND MISUNDERSTOOD BY OUR INDUSTRY

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"We naturally trust the BBC, the New York Times or the Guardian. But younger people, Millennials, don't naturally feel that way. If they see something on BuzzFeed or Vice, or watching Periscope, the way they react to it is very different."

Martin Sorrell

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WE STARTED WITH TWO HYPOTHESIS

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- NOT ALL MILLENNIALS ARE THE SAME
- TRADITIONAL MEDIA BRANDS STILL PLAY A ROLE IN THEIR LIVES

WE USED 2 DIFFERENT RESEARCH APPROACHES TO TEST THIS HYPOTHESIS

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1. Quantitative survey data

- Global sample total size **89,100** (Millennials, Gen X & Baby Boomers)
- Global Millennials 37,189
- Global influential Millennials (Gen-narrators) **11,283**
- 3 waves Q1, Q2, Q3 2014
- Habits, attitudes and behaviours
- GlobalWebIndex

2. Qualitative research panel

- Global sample of Gen-narrators recruited
- Realtime online research community
- Activity-based
- **128** participants
- Sample spans full Millennial age ranges, location and gender split
- January – April 2015
- Bloom HARK



 **Bloom**Worldwide

GLOBAL SCOPE

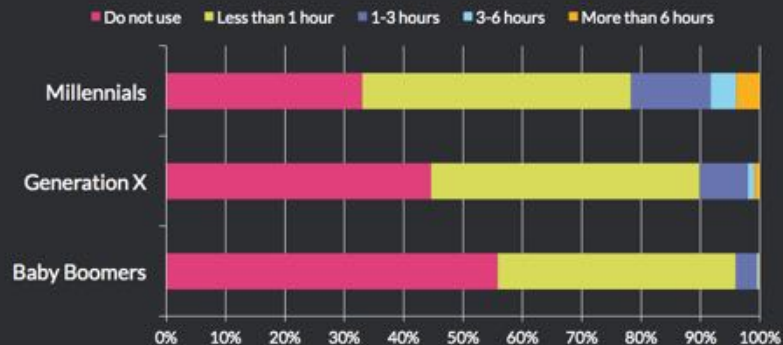
QUANT SAMPLE: 89,100
QUAL PARTICIPANTS: 128
TIMING: JAN-APR 2015

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WE RAN SOME INITIAL RESEARCH INTO THE MEDIA HABITS OF MILLENNIALS

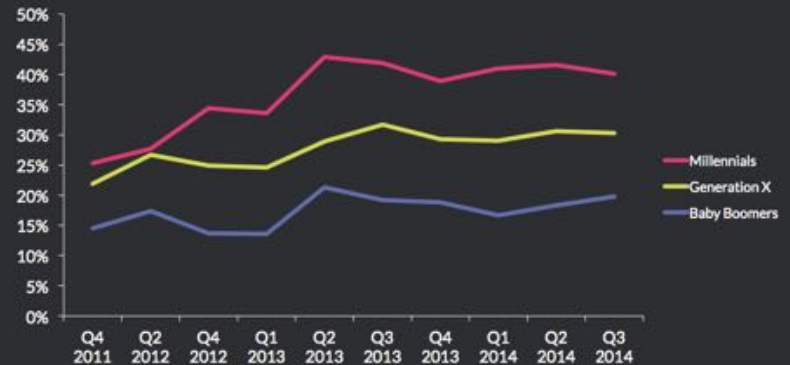
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22% of Millennials spend over an hour a day reading online news media



Source: GlobalWebIndex, UK data, time spent reading online print/press, Q3 2014

Millennials consistently comment on news stories more than other generations



Source: GlobalWebIndex, UK data, commented on a news story in the past month, Q4 2011 - Q3 2014

WE FOUND INTERESTING PATTERNS WHEN WE SEGMENTED BY PSYCHOGRAPHIC

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ONE PARTICULAR GROUP OF INFLUENTIAL MILLENNIALS STOOD OUT

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Our sub-segment of Millennials are defined by:

- Their **topics of interest** (technology, politics, business, finance, environment)
- Their **ability to influence** (they must regularly be asked for their opinion on above topics)
- Their **ability to share** (they must be vocal online about above topics)
- We call them **Gen-narrators**

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GEN-NARRATORS HOLD A SPECIFIC TYPE OF INFLUENCE – THEY ARE AUTHORITIES

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AMPLIFIERS

- Huge audience
- High popularity
- Viral potential
- Mainstream
- Pay in cash
- e.g. YouTube stars

1%

GEN-NARRATORS

- Focused audience
- Specialists
- Interest networks
- Pay in knowledge
- e.g. tech blogger

29%

FOLLOWERS

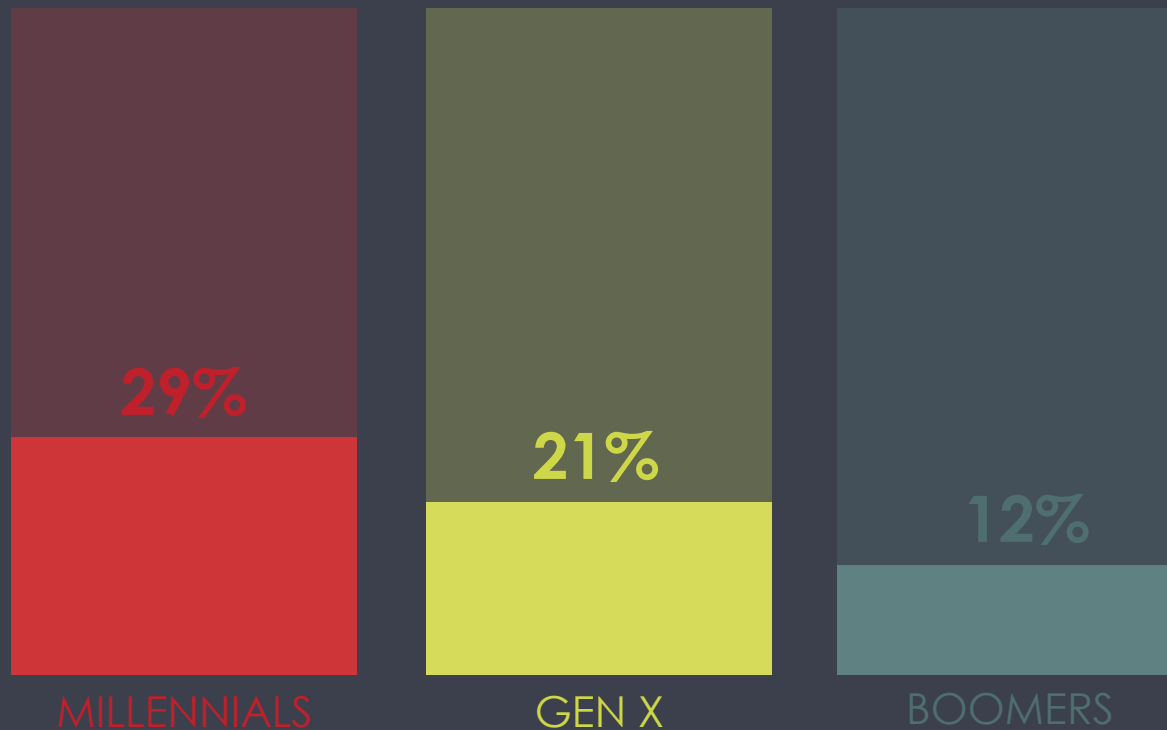
- Well connected
- Consumers
- Share opinions with close network
- e.g. everyone else

70%

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WE CROSS-REFERENCED TO CHECK INFLUENTIAL SEGMENTS OF OTHER GENERATIONS

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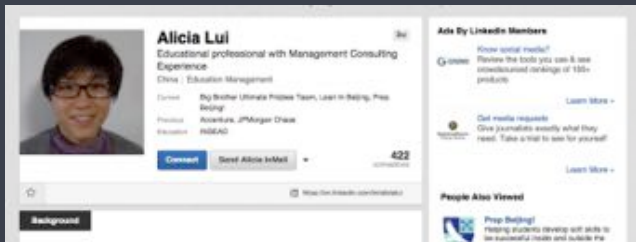


% of generation audience classified as 'influential' according to
same criteria used for 'Gen-narrators' quant analysis

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WHO ARE WE TALKING ABOUT?

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PORTRAYAL OF “MILLENNIALS”

Lazy

Narcissistic

Entitled

Apathetic

Social media-
obsessed

GEN-NARRATORS

Active

Interested

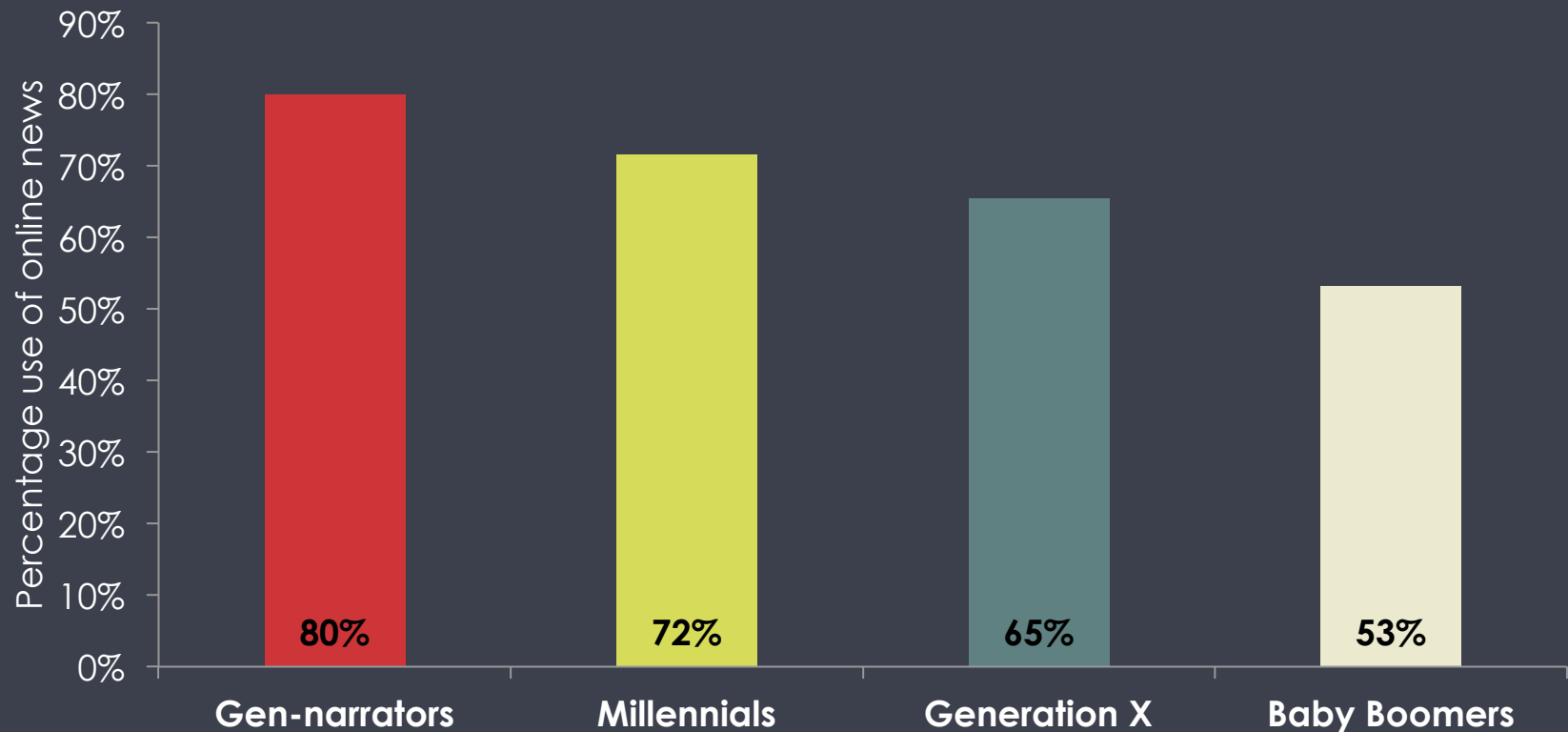
Entrepreneurial

Activists

Intelligent media
connoisseurs

GEN-NARRATORS CONSUME MORE NEWS MEDIA ONLINE

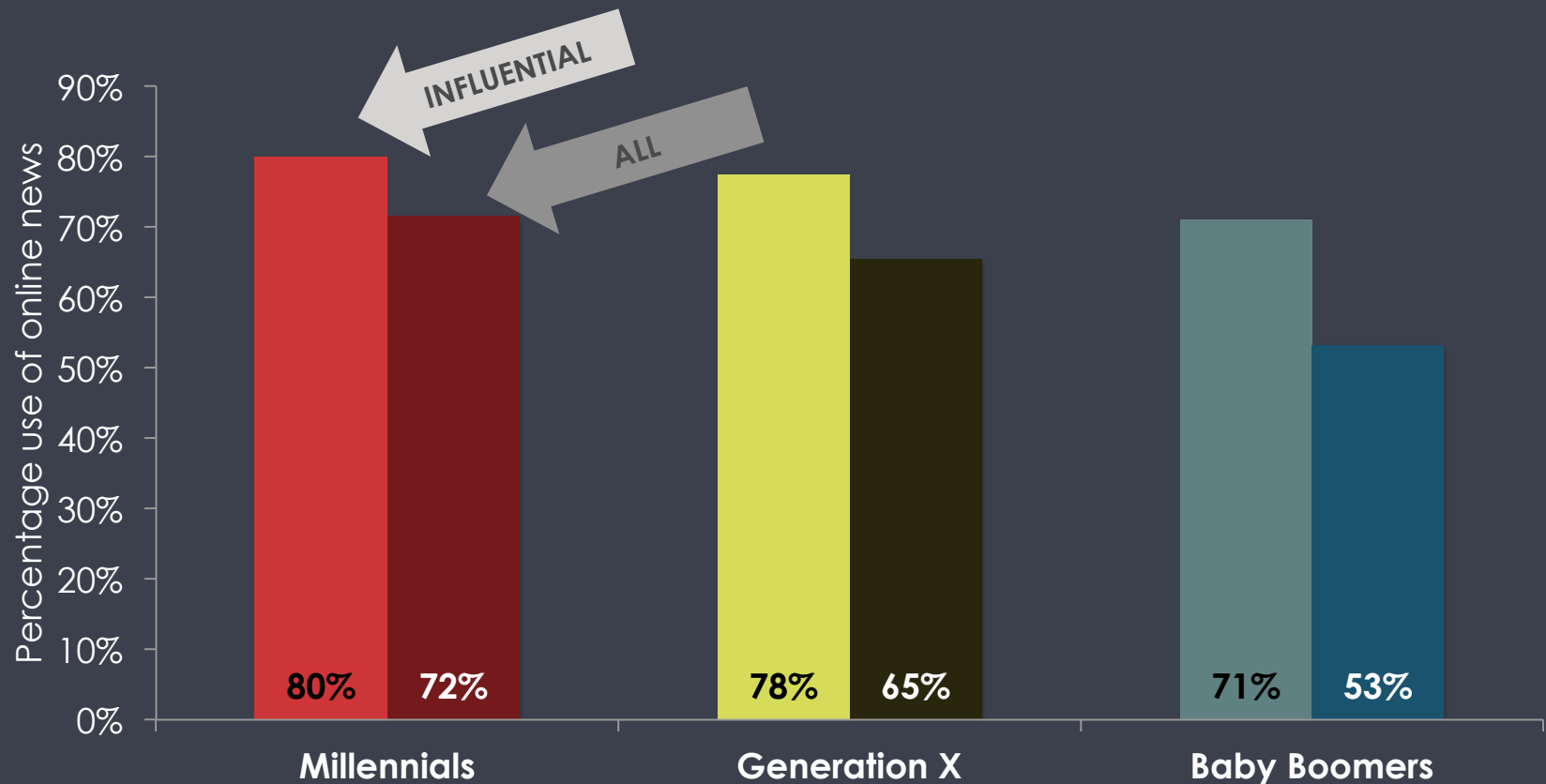
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AND CONSUME MORE THAN INFLUENCERS IN OTHER GENERATIONS

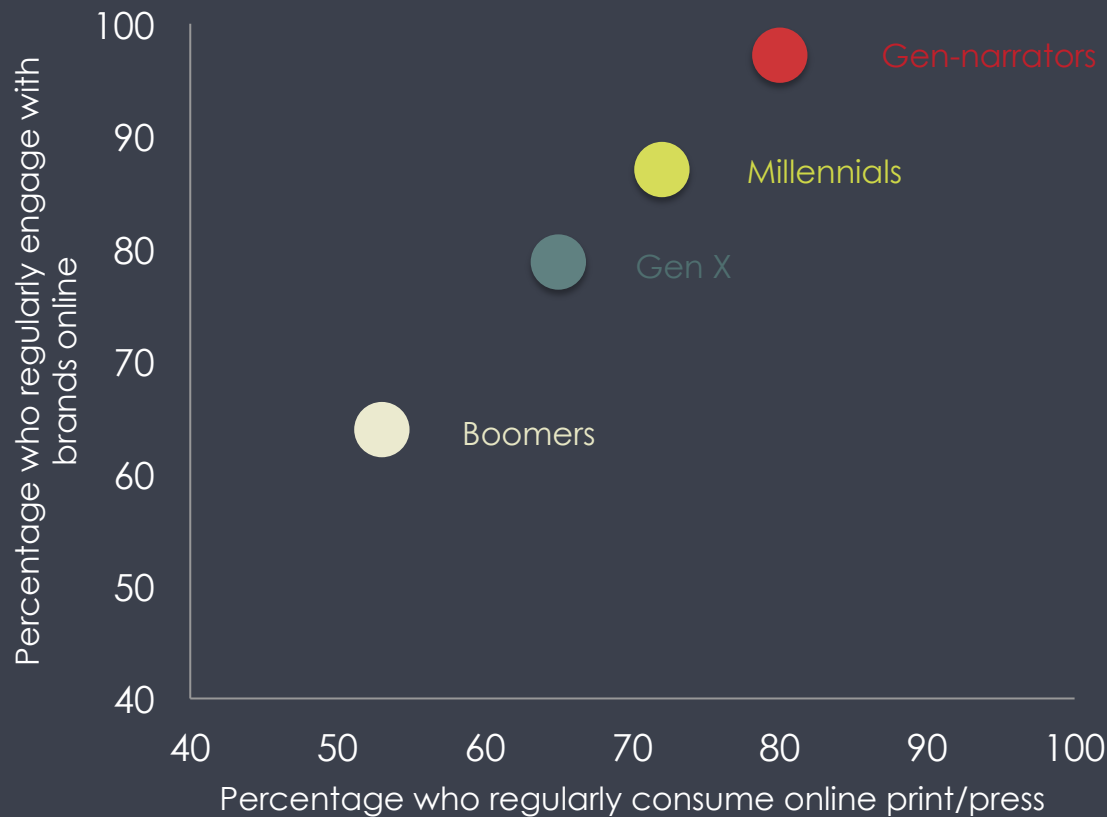
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WE FOUND A DIRECT CORRELATION BETWEEN ONLINE MEDIA CONSUMPTION AND BRAND ENGAGEMENT

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WE IDENTIFIED 4 STANDOUT TRAITS OF GEN-NARRATORS

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Fact Finders

Cultural DJs

Personal Brand
Managers

Influential
Advocates

1. GEN-NARRATORS ARE FACT FINDERS

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- **GEN-NARRATORS USE TRADITIONAL MEDIA BRANDS TO VALIDATE THE CREDIBILITY OF INFORMATION**
- **GEN-NARRATORS TRUST TRADITIONAL MEDIA FOR AN UNBIASED PERSPECTIVE**
- **GEN-NARRATORS INSTANTLY CHECK TRADITIONAL MEDIA WHEN SOMETHING 'BIG' HAPPENS**
- **THEY ACTIVELY SEEK THE TRUTH**

GEN-NARRATORS TRUST TRADITIONAL MEDIA OVER 'NEWER' SOURCES

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78%

OF 'MOST TRUSTED' ONLINE SOURCES WERE TRADITIONAL

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WHO DO YOU TRUST TO GIVE YOU THE FACTS?

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Mason

“On any story that I read, before I share I tend to fact check.....For the most part I sort of trust your bigger ones like New York Times”



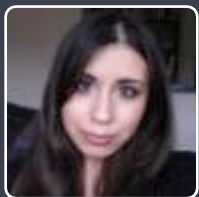
Edwin

“[Millennial] Singaporeans... have an idea of what's true or flawed, thanks to the wonder of the internet. Most of us have developed critical thinking skills to evaluate and have an unbiased judgement in our heads.”

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CASE STUDY: UK GEN-NARRATORS VALIDATE CHARLIE HEBDO ATTACK NEWS

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"I saw a few videos pop up on Facebook, however I did turn to the TV for more info"

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2. GEN-NARRATORS ARE CULTURAL DJS

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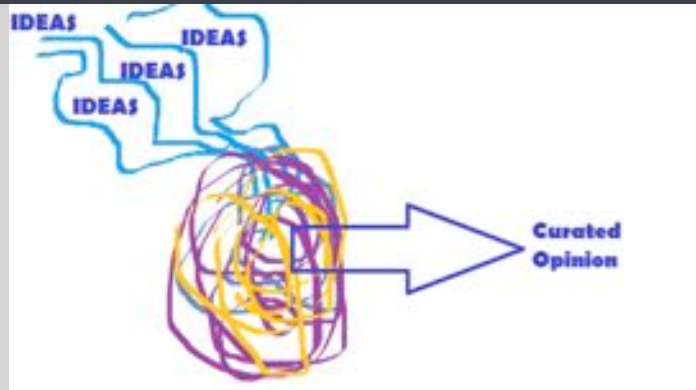
- GEN-NARRATORS REMIX CONTENT TO GIVE IT THEIR OWN TWIST
- THEY FAVOUR VISUAL MEDIA TO EVOKE A REACTION WHEN TELLING THEIR STORY
- GEN-NARRATORS CAREFULLY CONSIDER WHAT THEY REMIX IN THEIR ROLE AS CURATOR

GEN-NARRATORS ARE CURATORS OF EXISTING CONTENT, AND BUILD NEW CONTENT COLLABORATIVELY

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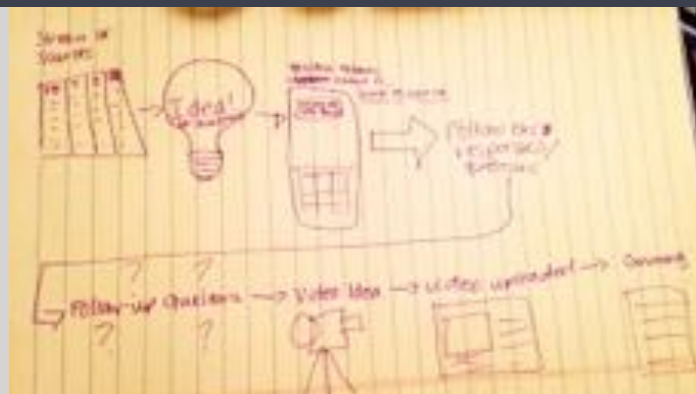


Anna



Lizzie

'Video storytelling' by Lizzie



CASE STUDY: #ROADTORUIN

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CASE STUDY: #ROADTORUIN

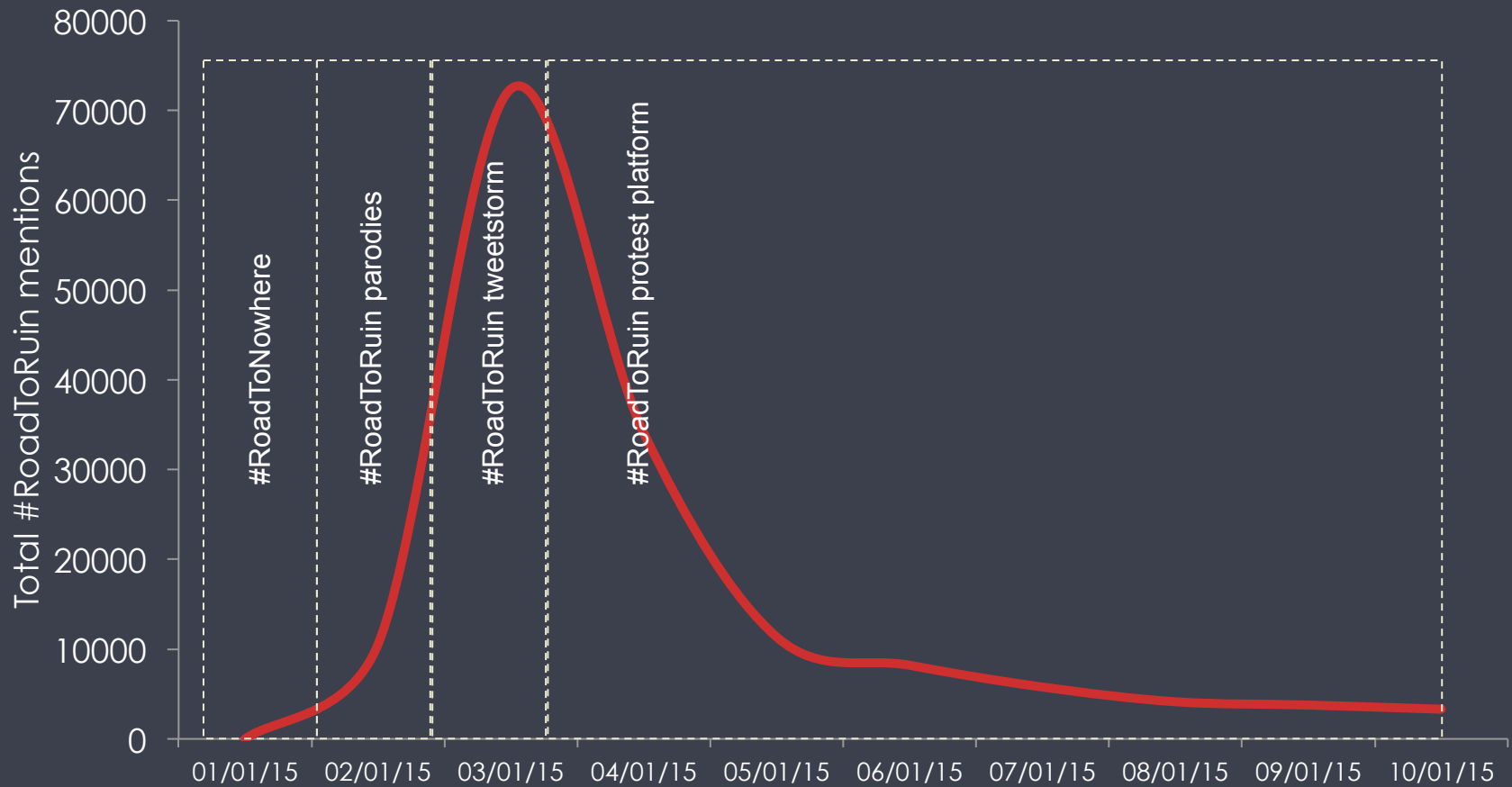
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EVOLUTION OF #ROADTORUIN OVER TIME

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3. GEN-NARRATORS ARE PERSONAL BRAND MANAGERS

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- GEN-NARRATORS TAKE THEIR PERSONAL ONLINE BRAND **SERIOUSLY**
- THEY WANT TO CHANGE MINDS AND **INSPIRE ACTION** FOR CAUSES THEY ARE PASSIONATE ABOUT BUT ARE VERY MINDFUL OF **TROLLING** AND CYBER BULLYING

GEN-NARRATORS USE THEIR INFLUENCE TO BOOST PERSONAL BRAND

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Tamara



"I share my opinions and interests pretty readily, but do so knowing that I am influencing and sharing my personal (online) 'brand'."



Russell



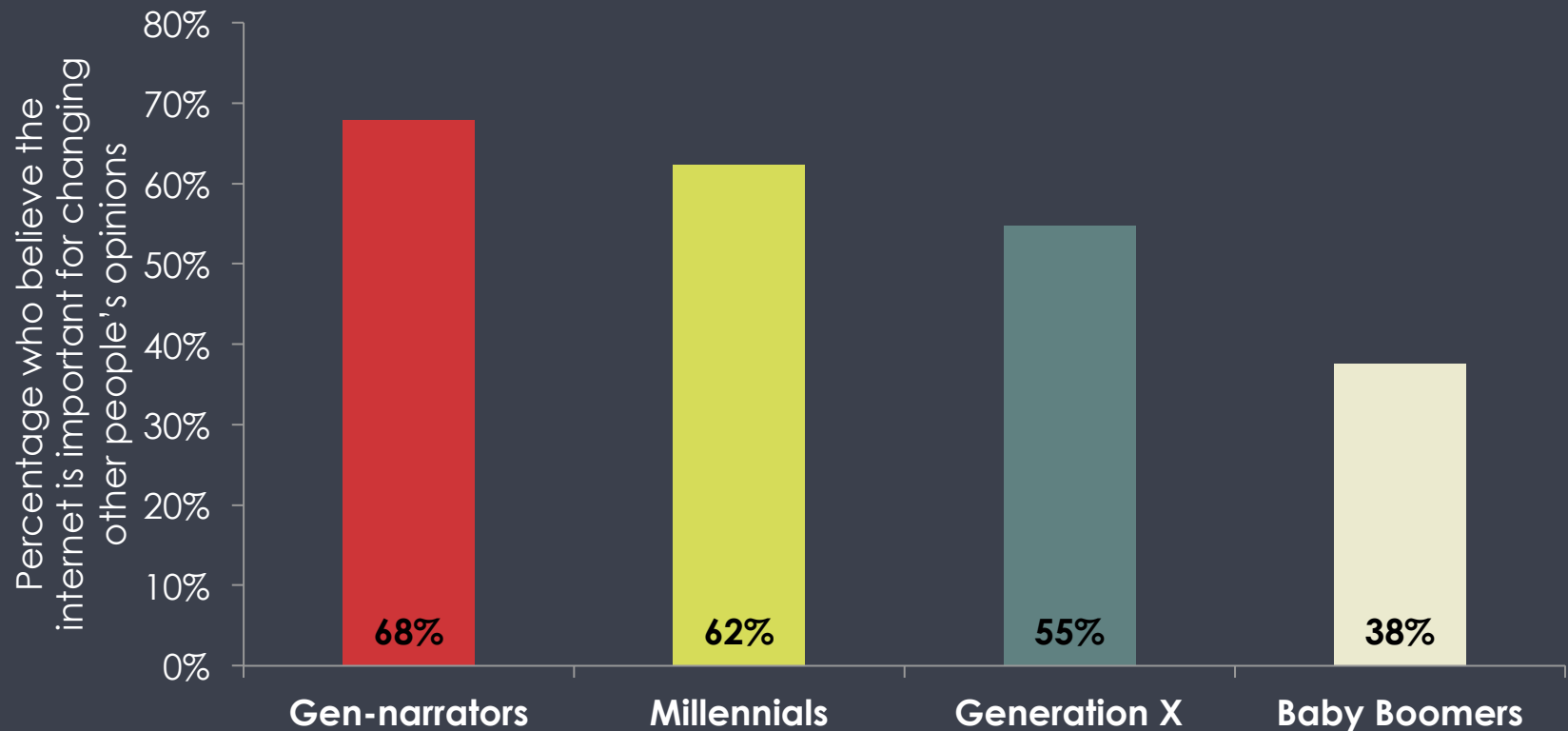
"Sharing good content helps you to be better positioned (personal branding) in your sector (as a reference)."



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GEN-NARRATORS HIGHLY VALUE THE INTERNET FOR CHANGING OTHER PEOPLE'S OPINIONS

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GEN-NARRATORS THINK BEFORE THEY SHARE OR COMMENT

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Richard



"By voicing an opinion you start to fight for something, at least in external perception. You brand yourself rather easily, maybe with something you weren't really passionate about in the first place."



Raghav



"I will only comment on news stories or start discussions if the topic is compelling enough. I do however like to share my opinion to what should matter to the people, form opinion and make a change."



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GEN-NARRATORS LOVE TO SHARE THEIR OPINION IN DEBATES OFFLINE AS WELL AS ONLINE

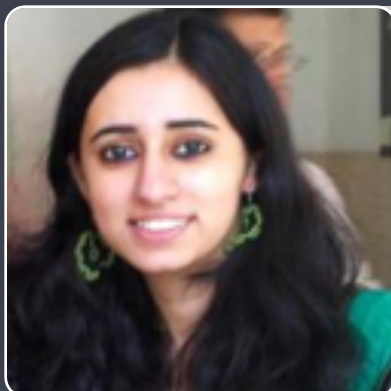
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Katie



"I prefer a face-to-face debate. The problem with online is that many people don't quite decipher the sentiment behind the written word."



Jyotika



"Any of those topics that I feel strongly about I like to comment and sometimes even provoke discussions amongst friends in an attempt to change their mind or make them see a new perspective."



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A person wearing large headphones is focused on their work at a computer in a dimly lit office. The background is blurred, showing other office equipment and lights. The overall tone is professional and tech-oriented.

4. GEN-NARRATORS ARE INFLUENTIAL ADVOCATES

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GEN-NARRATORS ARE AUTHENTIC INFLUENCERS



Jochem

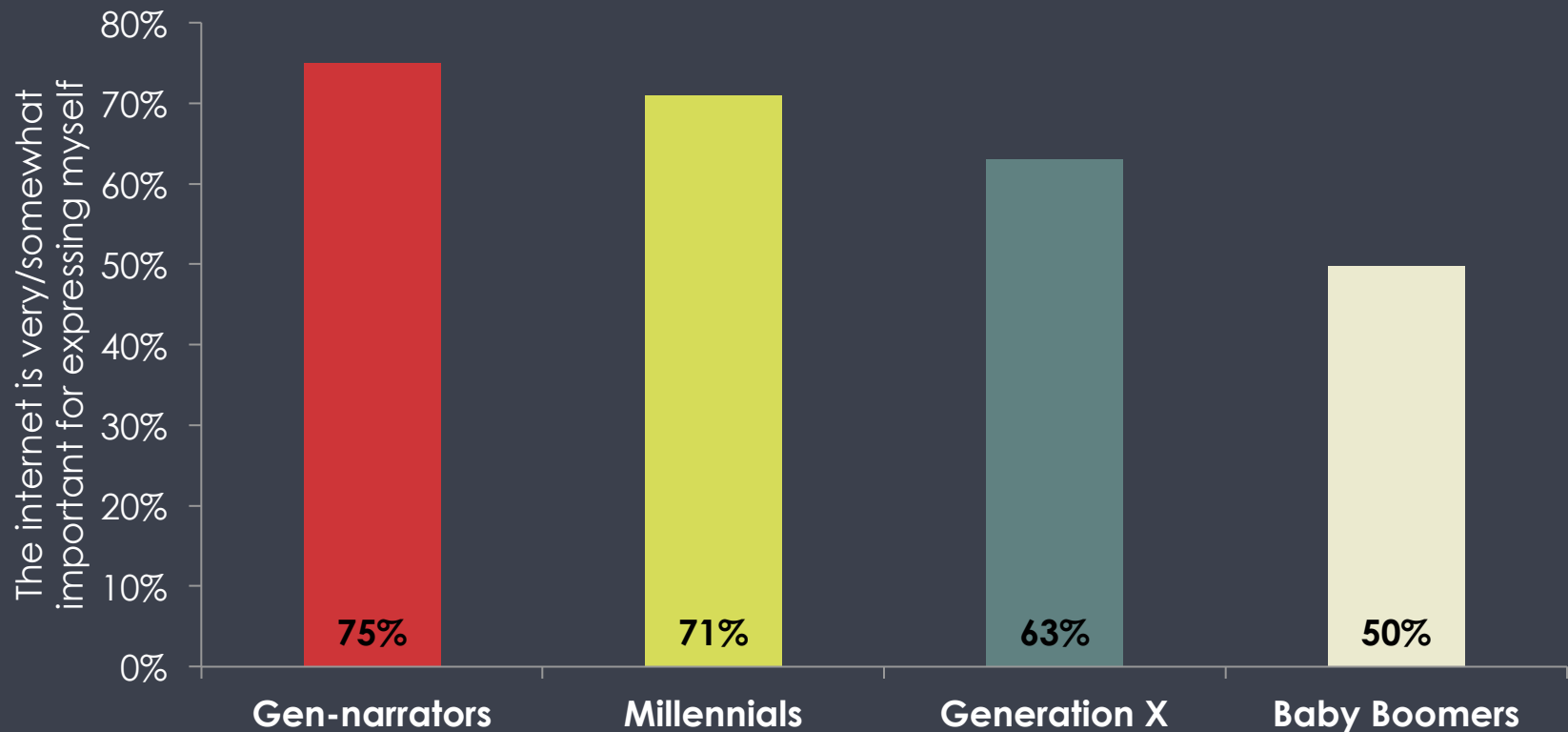


"Yes, I do try to impact other people's opinions on some issues. Absolutely. However, I try to only do that on the topics that I am knowledgeable about"



GEN-NARRATORS SEE THE INTERNET AS IMPORTANT FOR EXPRESSING THEMSELVES

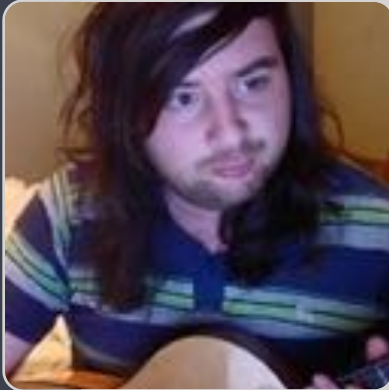
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HOW DO THEY INFLUENCE?

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Aaron



"(with my) YouTube channel I'm in a position where I could mislead for potential self gain but I don't, I like to educate and share knowledge not abuse my identity."



Anaëlle



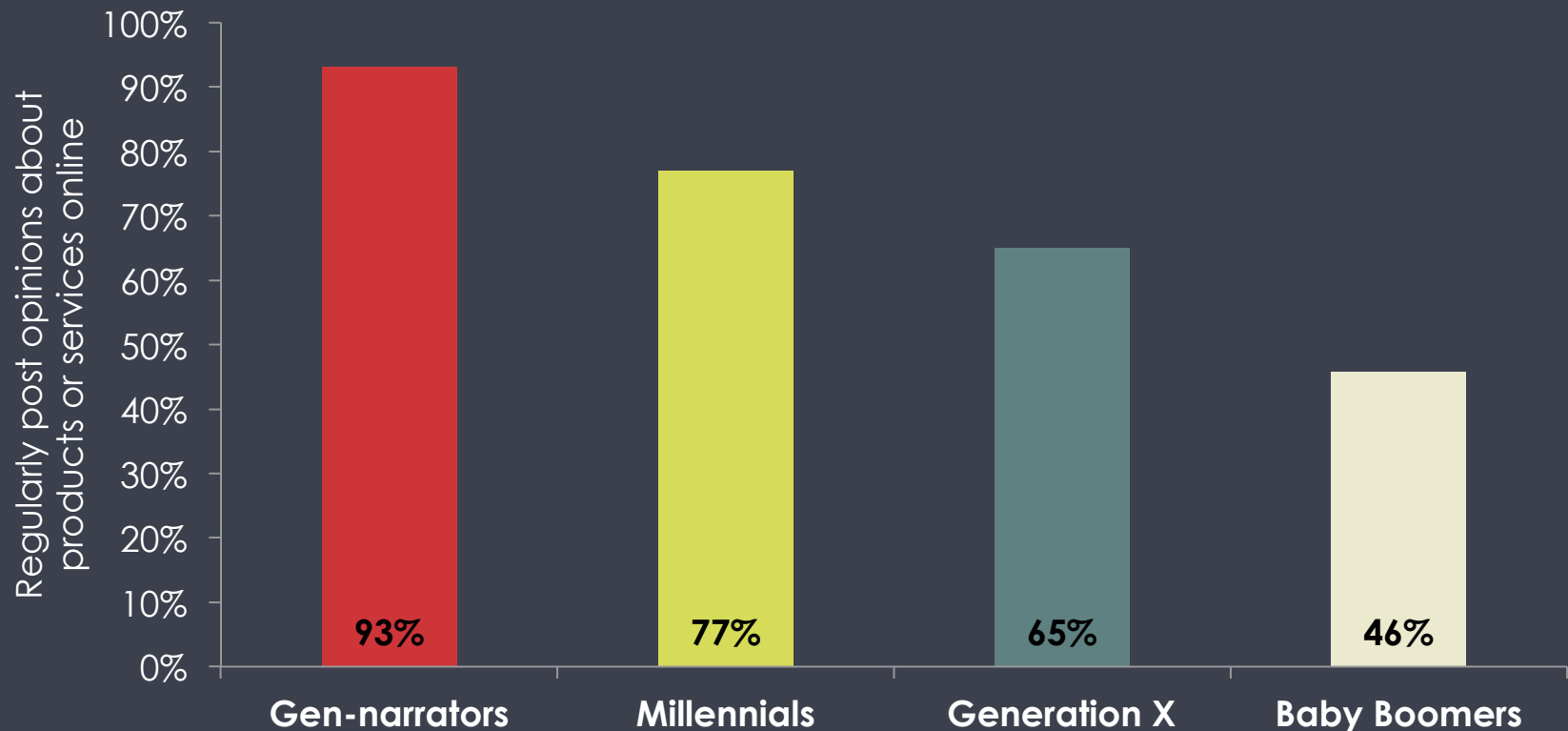
"Whenever I try to impact people's opinions I make sure it's more about raising their awareness on a subject that I am interested in."



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GEN-NARRATORS LOVE TO POST THEIR OPINIONS ABOUT PRODUCTS

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BRAND ADVOCACY HAS TO BE AUTHENTIC AND FIT WITH THEIR PERSONAL BRAND

39



Ally



"For me, it's more about content. If you talk about a brand that's doing something really interesting in a campaign and the content is interesting then I would share that."



Joash



"I believe that it's important to support the brands that you trust and you feel comfortable promoting."



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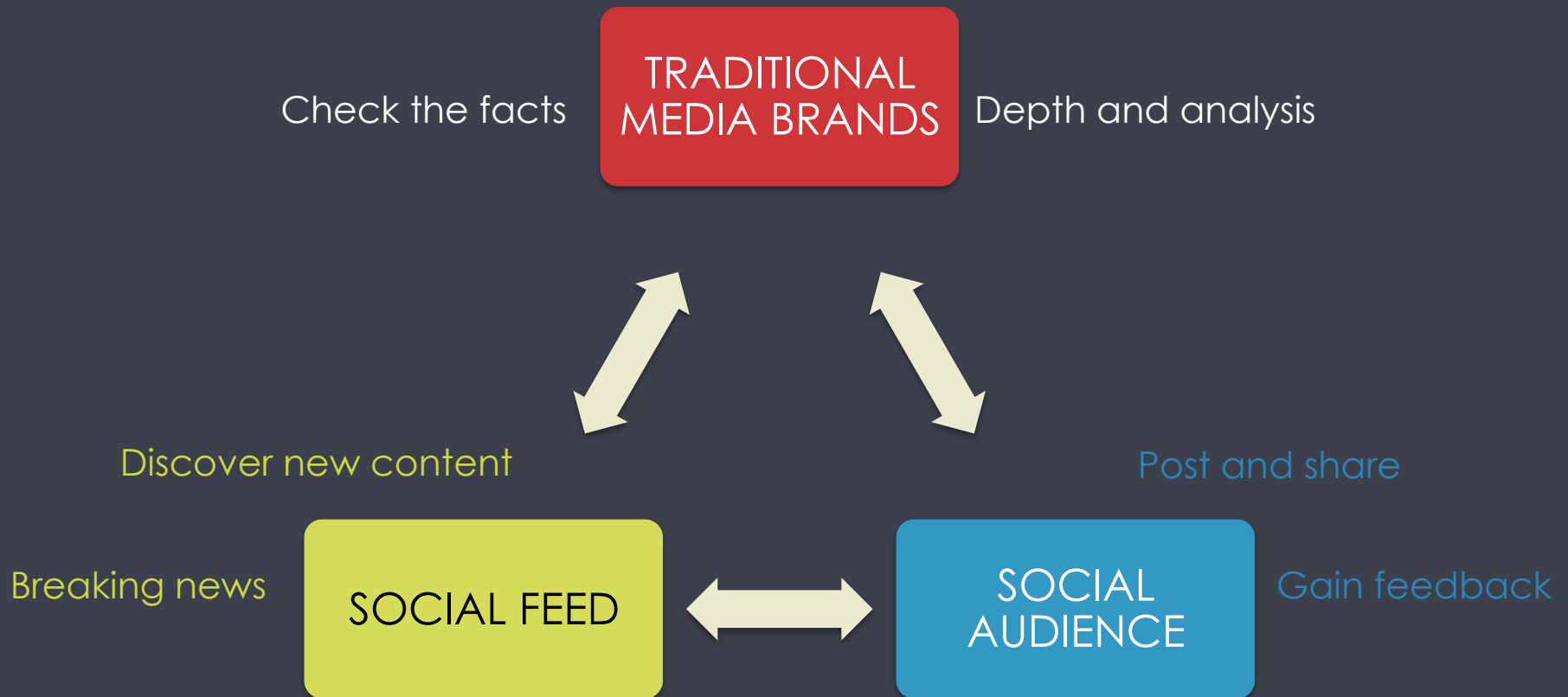


HOW CAN YOU HARNESS THESE TRENDS?

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TRADITIONAL AND SOCIAL WORK TOGETHER, FEEDING OFF EACH OTHER

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HARNESS GEN-NARRATOR'S POWERFUL
INFLUENCE BY HELPING THEM TO BUILD
THEIR AUTHORITY

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ALLOW THEM TO DEBATE THEIR PASSIONS
IN A SAFE ENVIRONMENT

43

A photograph of a field of dandelions in bloom, with the text 'Provide a' and 'SAFE AND FOCUSED SPACE' overlaid. The text is white and bold, with horizontal lines above and below it. The background is a soft-focus field of dandelions under a cloudy sky.

Provide a

SAFE AND FOCUSED SPACE

For them to debate

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ENCOURAGE ADVOCACY BY ADDING
VALUE TO THEIR PERSONAL BRANDS

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Give them a
REASON TO RECOMMEND
That boosts their brand

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THEY CAN BECOME AUTHENTIC AND
TRUSTED CONTENT DISTRIBUTERS

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Because they are

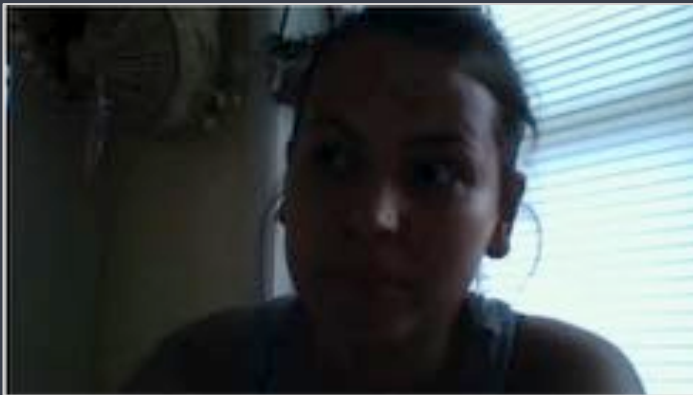
TRUSTED CURATORS

Your messages will spread

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THE FINAL WORD FROM ONE OF OUR GEN-NARRATORS...

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Nana

"I get really happy,
and I feel flattered when
people trust me to
influence the way *they*
think. I hope I play this role
with a lot of responsibility."



ANY QUESTIONS?

DEFINITION OF GENERATIONS

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MILLENNIALS
18-35



GENERATION X
36-50



BABY BOOMERS
51-68*

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