

CONSUMER INSIGHTS JANUARY/FEBRUARY 2014

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SPIKE'S "SECOND SCREENERS: EXTENDING CONSUMER ENGAGEMENT"

Consumers today are citizens of a multi-screen nation, with more entertainment options – and ways to access entertainment content – than ever. In this study, Spike examined how and why consumers engage with second-screen content, and the payoff for content creators and marketers. The findings reveal that the second screen is fundamental to today's TV experience and is driving interactivity. Indeed, the screens aren't competing, they're completing the experience.

Key Findings

Multi-screening reigns, with the majority of viewers engaging a second-screen while watching TV.

- Of those second-screen users, 40% engage with a TV show via Facebook, Twitter or TV app while watching TV for at least one show.
- Fans feel more deeply connected and engaged when they do so: second screeners report feeling "alert," "engaged," "focused," "happy," "connected" and "excited" when they interact with or discuss a TV show via Facebook, Twitter or TV app.

Second-screen behaviors fulfill a range of inward and outward needs – from seeking information about a topic on a TV show to connecting with friends around that show.

Cerebral

- 81% search for info about topic on TV show
- 77% look for info about something seen in ad

Crave

- 67% visit TV show website to learn more
- 57% like having instant access to extra content

Connect

- 58% text friends about a show
- 41% use social media to connect with real world friends while watching a favorite TV show

Self-Casting

- 56% post a status update to Facebook about a show
- 50% publicly "chat" about a TV show on a TV website or blog

Engaged viewers are Super Fans and Product Ambassadors.

Compared to non-engaged viewers, engaged second-screen viewers feel more excited about and more connected to the show they're watching. This emotional excitement translates to action.

- They're more likely to watch TV shows when they air live: 60% of all engaged viewers are more likely to watch TV shows when they air live.
- Engaged viewers are product seekers, more likely to:

- Search for music they heard in a show
- Look for more information about something they saw in an ad
- Remember advertised products
- Search for products they saw in a show
- Shop online for something saw in a show
- Purchase something they saw advertised during a show
- Purchase something they saw in a TV show

Implications:

The second screen is a huge opportunity for marketers to extend engagement. By creating custom experiences and owning the space with complementary ads, brands can connect more deeply with consumers.

The Methodology:

This study is based on data from several surveys including a total of 2,800 people ages 18-54 who watch TV and own a second screen.

VIMN'S "KIDS OF TODAY AND TOMORROW"

A truly global exploration, Viacom International Media Networks' "Kids of Today and Tomorrow" study is the network's broadest and most detailed analysis to date of kids around the world. With research based on 6,200 kids ages 9-14 across 32 countries, this study focused in on "last wavers," or the youngest Millennials, born between 2003 and 2008. The findings point to several key traits that shape these kids' world views and make them distinct from older members of this generational cohort.

Key Findings

Kids of today and tomorrow are confident.

Today's youngest Millennials are overwhelmingly happy and optimistic.

- 88% consider themselves very happy, with happiness levels in this age group increasing over last six years.
- Spending time with family and friends is the top factor generating happiness in most countries. Young Millennials enjoy doing activities together as a family.
- Humor is important to young Millennials, who use it strategically to navigate life: 64% agree "I use humor to help me get my way."
- Happiness outweighs stress by a factor of 3 to 1: while almost 9 in 10 young Millennials describe themselves as very happy, only 24% report high levels of stress, with stress levels falling since 2006.
 - Kids today are re-calibrating their sense of what it is to be stressed as well as happy: they have grown up in a world of constant change and global economic crisis – for them, this is the norm.
 - Even in Greece, where the economic crisis is particularly acute, stress levels are only 36%. The highest stress levels among 9-14s are actually in Singapore and China (41% and 39%) – caused almost certainly by the highly pressured education systems in those countries.
- In general, the youngest Millennials are characterized by an optimism with which they approach challenges: 90% agree "I can accomplish anything if I work hard enough" and 89% agree "I always try to be positive."

At the global level, these high levels of happiness, low stress and growing positivity are combining to form a "virtuous circle" of mutual support that helps kids create an overall sense of confidence.

- **Belief in themselves:** 65% believe not only that they are smart but also that they are smarter than other people.
- **Belief in their future:** Despite everything, a large majority (84%) believe they will earn more than their parents
- **Belief in their generation:** This is the winning generation ... the expression "#winning" suits them perfectly and is acknowledged by many more 9-14s than by older Millennials (77% vs. 66% of 15-30s)
- **Belief in their creativity:** 89% believe their creativity will help them to keep on winning in a fast-paced world.

Kids of today and tomorrow are grounded.

Authenticity is a key value for kids today and they live with their feet firmly on the ground.

- 94% report wanting to be true to the close circle around them and 93% to be true to themselves. When it comes to the people who inspire them or the people they trust most, it's all about close family and friends. They might feel inspired by celebrities and sports stars, but they know not to trust them.
- 49% of the youngest Millennials name a family member as their #1 best friend— rising as high as 90% in Morocco and 87% in Brazil.

Kids of today and tomorrow are simultaneously more and less sheltered.

The difference is very clearly defined: in the real world, they are much more sheltered than in the past, with parents restricting and controlling their interactions with everything. However, given advances in technology and access to a wide range of devices, there is often relatively little protection – kids have unprecedented exposure to global ideas and images.

- 43% own their own computer/laptop and 28% own a smartphone.
- 61% have a social media account (and 11 years is the average age for having a first account – despite being below the age threshold set by many social platforms' Terms & Conditions).
- 9-14s have 39 online “friends” they have never met (up from five since 2006).

Kids of today and tomorrow are proud to be.

The youngest Millennials are increasingly expressing a sense of affinity with their country. Their sense of national pride is growing stronger and they are more likely than six years ago to believe it's important to maintain their country's traditions.

- 87% agree that they are “proud to be [their ethnicity]” up from 81% in 2006.
- 79% agree “it's important to maintain my country's traditions,” up from 60% in 2006.
- At the same time, they are tolerant of other cultures: 74% think it's great to have people from other countries living in the kid's country.

Kids of today and tomorrow are more “we” than “me.”

The youngest Millennials extend their positive spirit to also include a commitment to community and the wider world around them.

- 88% believe it's important to help people in the community, with 61% having taken part in an effort to raise money for charity in the past year.
- 94% believe it's people's responsibility to protect the environment.

Advances in digital media play a large part in broadening horizons and inspiring kids to use the power they have at their fingertips in a positive manner:

- 85% agree “my age group has the potential to change the world for the better.”
- 71% agree “having access to the internet changes the way I think about the world.”

However, they don't see this as anything out of the ordinary or think of themselves as “techy”:

- 2 out of 3 kids think that being connected is as much a part of everyday life as eating and sleeping – it's simply how life is today. As a consequence of being constantly connected in a fast-moving world, it is natural for them to constantly adapt and be open-minded. They are resilient and life-ready.

Implications:

- To reach these confident kids, it is important to communicate with them with a tone of positivity, smart but not cynical humor; and a playful approach, in line with the fun and happiness they seek in life.
- Kids respond best to authentic brand messages: they recognize when someone is trying to sell them, so be honest.
- It's important to be both globally and locally relevant.

Methodology:

This study is based on 6,200 interviews with the 9-14 age group (at the time of research, born 1998-2003, which we have defined as “last wavers” within the Millennial generation) across 32 countries (Brazil, Mexico, Argentina, US, Canada, France, Spain, Italy, Portugal, Greece, UK, Germany, Netherlands, Sweden, Russia, Hungary, Poland, China,

Japan, Singapore, Malaysia, Thailand, Philippines, Australia, New Zealand, India, Turkey, Saudi Arabia, Egypt, Morocco, Nigeria and South Africa).