Digital Natives

How Is the Younger Generation Reshaping the Telecom and Media Landscape?

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1 Introduction

The history of the telecom and media sector is littered with unexpected successes and surprising failures. Video calling, for instance, was thought to be the "killer 3G application" by many mobile operators, but uptake of the service is still limited with less than 5% of 3G subscribers using the service in the UK and France in 2006.[1] Other than price and quality, most operators underestimated visual privacy concerns when assessing demand for the service. Similarly, no one anticipated the phenomenal growth of SMS, which grew from 10 billion to 100 billion messages sent every month worldwide between 1999 and 2006.[2] These examples reflect the difficulty in predicting consumer behavior, which is set to become even more complex with the increasing number of options available to consumers for communicating and consuming media.

To anticipate how consumer behavior will evolve, it is important to identify early signs of change in how people communicate, entertain and interact with each other. A good barometer of the impending developments is the evolution in the attitudes of 15–24 year olds, an age group that is often at the forefront of cultural and technological change. This group, for instance, was the early adopter of the Internet, embracing the medium much faster than the rest of the population: 65% of American teens were using the Internet in 1998, a penetration figure that was only reached by the overall US population in 2005.[3] Products and services popularized by this age group often subsequently gather momentum in the wider population. Consider that video games were predominantly played by teenage boys in the 1980s before they developed into a mainstream leisure activity. The average age of British video gamers has risen from 21 in 1998 to 27 in 2006,[4] belying that gaming is solely a teenage obsession. Therefore, understanding how the 15–24 year old age group consumes telecom and media services can give us important insights into what is in store for the industry.

In this report, Capgemini's TME Strategy Lab analyzes 15–24 year olds' use of technology to communicate, entertain and socialize in order to identify emerging patterns of consumer behavior. We begin by studying how our consumption of communication and media services has evolved over the past few years. We go on to consider how telecom and media players should respond to these emerging patterns of consumer behavior in order to take advantage of the arising opportunities.

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1 Strategy Analytics Insight, April 2006.   2 Gartner, 2006; Telecomworldwire, 1999.   3 Interactive PR and Marketing News, July 1998; Pew Internet Project, Internet Penetration and Impact, April 2006.   4 BBC, "Gamers in the UK," December 2005.

2 The Media and Communications Consumption Boom

Over the past few decades, the telecom and media sector has undergone dramatic changes as choices available to consumers have increased manifold. For example, content producer Endemol offers its *Big Brother* programs not only on TV but also on the radio, the Internet and mobile devices, in full length as well as short format. Consumers can also interact with the programs through voice calls and SMS to vote, win prizes and send suggestions to the production team.

Consumers' use of personal digital devices has also accelerated in the past few years. In addition to a TV set, an average Internet user in the UK, for example, now owns three to four devices, with 85% owning a PC, 57% a WAP-enabled phone, 53% a games console and 48% an MP3 player.[5]

This world of choice is praised by users who communicate and consume media more than ever before. In the UK, for example, weekly time spent on communication and media activities has increased by 15% from 53 hours to 61 hours per week between 2001 and 2006.[6]

Looking at media use specifically, we estimate that time spent per week increased from 50 hours to 56 hours from 2001 to 2006 in the UK (see Figure 1). Consumers continue to be interested in TV and music, spending nearly 80% of their media time on such activities. However, the growth in media use comes from new types of content such as gaming and interactive Web content like online shopping, user-generated content or social networking.[7] Gaming, in fact, is the

Figure 1: Estimated Time Spent on Various Media Activities in the UK
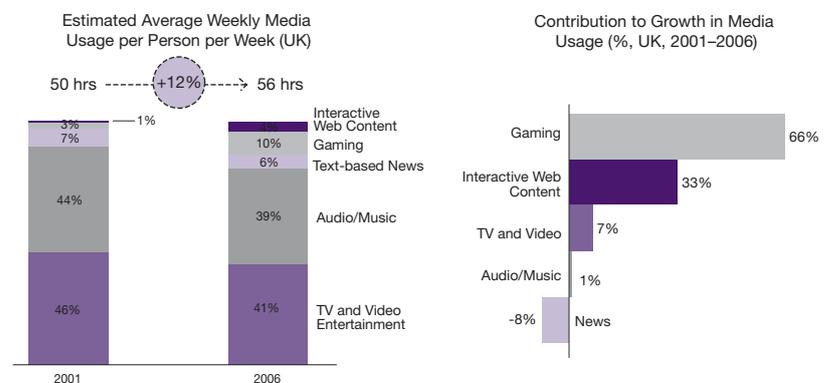
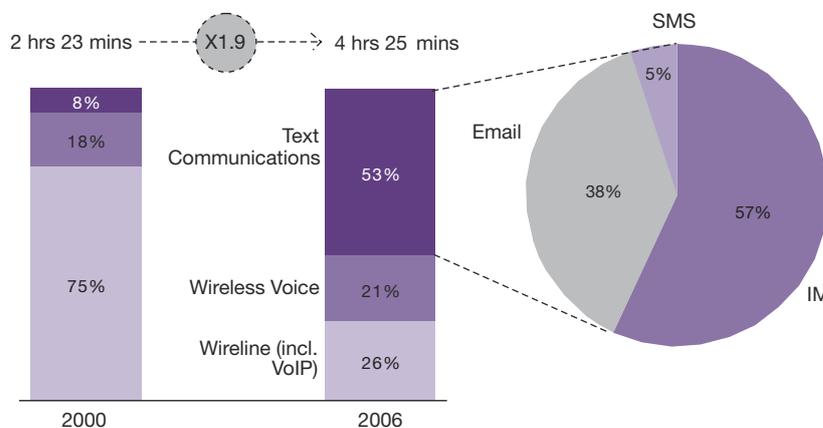
Source: Capgemini TME Strategy Lab analysis; Ofcom Communications Report, "The Communications Market," 2006; IDATE, "Telecom 2.0: Emerging Usages and Implications for Carriers", June 2006; ARCEP reports; European Interactive Advertising Association survey of 7,000 people across Europe, 2005; BBC, "Gamers in the UK," December 2005.

5 Nielsen NetRatings, "The 21st Century UK Digital Consumer," 3 October 2006.   6 Capgemini TME Strategy Lab estimates based on OECD data; AT&T Research Labs, "The History of Communications," June 2000; Ofcom Communications Report, "The Communications Market," 2006; European Interactive Advertising Association Media Scope Surveys; BBC, "Gamers in the UK," December 2005.   7 Examples of user-generated content commonly referred to as "Web 2.0," include YouTube, DailyMotion or Flickr. Social networking websites include MySpace or Facebook.

single biggest contributor to the increase in media time over the past 5 years, accounting for 66% of the growth in media use. The average time spent on gaming per person in the UK nearly tripled over 2001–2006. This is due to the availability of higher quality games on various platforms, ranging from traditional consoles to PCs and mobile phones. The other key growth area, interactive Web content, has contributed to more than 30% of the increase in media use. In particular, user-generated content and social networking are growing rapidly, gaining significant traction among the youth. In the UK in 2006, online 12–17 year olds spent three times as much time as an average user engaged with such content.

Additionally, we communicate more than ever before. In France, time spent on communication doubled to 4.5 hours per week over 2000–2006 (see Figure 2). Consumers have also started to communicate differently, with time spent on texting overtaking voice. Usage of IM, email and SMS grew dramatically during this period. The Internet played a significant role, with consumers spending more time on the Internet and dedicating 40% of this time to IM and email. IM is particularly popular among the younger generation; for example, 75% of US online teens use IM compared with only 42% of online adults.[8] The preference for text communication is on the rise because it is not only cheaper but also non-intrusive, enabling users to be always connected discreetly, wherever they are. Consumers are also considering new ways of communication such as blogging to be in touch with the online community. Indeed, two thirds of bloggers in France in 2006 said that they considered their blog to be a communication tool.[9]

Figure 2: Estimated Time Spent on Communications, Per Person, Per Week (France)

Source: Capgemini TME Strategy Lab analysis based on Arcep reports; IDATE, "Telecom 2.0: Emerging Usages and Implications for Carriers," June 2006; MSN Report, "Europe's Online Youth," 2006.

Pew Internet Report, "Teens and the Internet," July 2006.   9 Médiamétrie, 2006.

3 Changing Behavior of 15–24 Year Olds

Telecom and media usage is changing rapidly. To understand where these changes will lead us, it is important to look at the behavior and attitudes of 15–24 year olds. The new patterns of behavior are especially pronounced among the younger generation, the pioneers of the digital age. The under-25 year olds are the first "digital natives" who grew up surrounded by devices. In the US, for instance, more than two thirds of all 8–18 year olds have a TV in their bedroom, nearly half have a video games console, and more than 30% have a computer.[10]

Our analysis shows that the behavior of this generation is characterized by four key themes that summarize the new media and communication equation. This younger generation desires *Control*, with the ability to access content and communicate whenever they choose, regardless of location. *Impatience* is also characteristic of this age group, as it seeks to make the most efficient use of its time through multitasking and "media snacking." The youth are also constantly engaged in *Community Interactions*, sharing opinions on what content is worth seeing or experiencing. Additionally, they are looking for avenues of self-expression that enable them to showcase their creativity and portray their *Originality*.

Control

For a long time media consumption has been a lean-back, passive experience, constrained by broadcasting schedules. However, younger users are playing a more active role in controlling and deciding how and when they want to consume media. They are starting to move away from platforms such as linear TV and radio that do not enable content to be consumed in a flexible way. Take broadcast TV, for instance, which forces users to consume content according to a schedule. The younger generation is spending less time in front of the TV set than other age groups. The average time spent by 15–24 year olds in the UK on TV viewing on the TV set has declined by nearly 1.5 hours over 2001–2006, compared to an increase of 11 minutes for other age groups for the same period.[11]
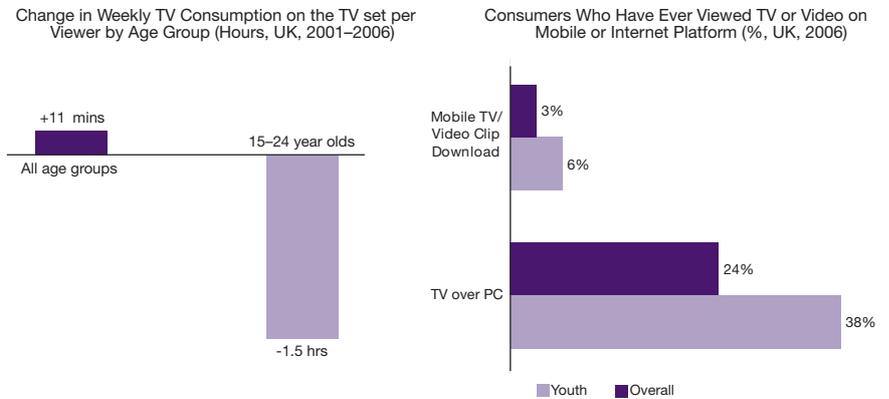
However, this does not mean that the younger generation is abandoning traditional media; in fact, they are increasingly relying on services that let them access content whenever they want (see Figure 3), such as Personal Video Recorders (PVRs) and Web TV. Consider, for example, that nearly 38% of the youth in the UK now consumes TV content on a PC compared to 24% of all individuals.[12] The same is true for radio, with 40% of 18–26 year olds listening to radio online compared with a 25% average for Internet users in the US in 2006.[13]

Impatience

Consumers today are living in a world of hyper-choice. They own multiple devices that provide access to a very wide range of communication and content services. To make the most of their time, they are increasingly consuming several types of content at once, rapidly switching attention from one source to another, a form of multitasking (see Figure 4). This is a key trend for all demographics and especially for

10 Kaiser Family Foundation, "Generation M: Media in the Lives of 8–18 Year-Olds," 2006.   11 Ofcom Communications Report, "The Communications Market," 2006.   12 Ofcom Communications Report, "The Communications Market," 2006.   13 Forrester Research, "Consumers' Behaviour Online: A Deep Dive," 4 January 2007.

Figure 3: The Younger Generation Consumes Less Scheduled and More On-Demand Content

Change in Weekly TV Consumption on the TV set per Viewer by Age Group (Hours, UK, 2001–2006)

+11 mins
All age groups

15–24 year olds

-1.5 hrs

Consumers Who Have Ever Viewed TV or Video on Mobile or Internet Platform (%, UK, 2006)

Mobile TV/ Video Clip Download
3%
6%

TV over PC
24%
38%

■ Youth ■ Overall

Source: Capgemini TME Strategy Lab analysis; Ofcom, Communications Report, "The Communications Market," 2006; eMarketer.com, "Mobilizing Social Networking Sites," 26 January 2007; M:Metrics Benchmark Survey, February 2007.

Figure 4: Multitasking Behavior While Online (US, % of Online Users, 2006)

78%
70%

73%
61%

■ Teens
■ Adult

Watching TV   Listening to the Radio
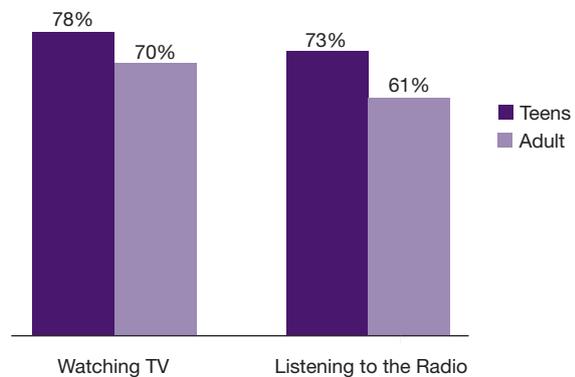
Source: Capgemini TME Strategy Lab analysis; eMarketer.com, January 2007.

15–25 year olds. In the US, 25% of teenagers' media time in a typical day consists of overlapping media experiences.[14] This is creating a generation of time-starved users, juggling various activities at the same time, always on the lookout for something better to invest their attention in, eventually resulting in attention thinning.

In order to maximize the "efficiency" of their media time, younger users "pull" content through search engines and RSS feeds that let them only consume the bits of content that are relevant to them. They are also looking to consume content in stripped down, fragmented formats that one could call "micro-chunks." Content is thus increasingly "snacked" under the form of short TV recaps, sports highlights, user-created short films, or single music tracks. As a result, short-form content from media players has also started to debut on the Internet. For example, in

14 NPD Group's "Kids' Leisure Time II",2007

April 2007 Michael Eisner, former Disney CEO, launched a series of 90-second "webisodes" called "Prom Queen" on sites such as MySpace and YouTube, with distribution on mobile handsets planned for the second half of 2007.[15]

The need to manage time efficiently is leading to a generation of "ad-avoiders," ready to shut out advertising inputs if it is not perceived as entertaining or informative. Two thirds of 16–24 year-olds in the UK indicate that they largely ignore TV ads. This compares to less than a quarter of those aged 65 or older.[16] Respondents of a survey in the UK deemed skipping through ad-breaks at "30 times normal speed" as the most attractive feature of the PVR.

Community Interaction
The influence of their peer group on the younger generation is nothing new. However, the Internet has opened up the possibility for today's younger generation to interact with a global community at any time, anywhere. This age group continuously exchanges opinions on what is worth seeing, reading and downloading. Conversations between peers then arise around that content in the form of blog comments, links sent by email, IM discussions, merging communication and content into what one could call "conversational content." Indeed, for an increasing number of young users, content gets added value from the ability to consume and discuss it collectively. Consider for instance that 30% of the volume of the blogosphere is made up of comments posted by blog readers. These comments are actually perceived by blog readers as being just as valuable as the original post.

Blog postings can create a word of mouth effect that can propel the popularity of content from a core group of fans to the mainstream in no time. Witness the popularity of the relatively unknown UK artist Lil Chris who rose to fame mainly due to the buzz created by online communities. Before his single reached the number 3 position on the UK charts in September 2006, nearly 65% of the traffic on his website originated from online communities such as Bebo and MySpace.[17]

Members of online communities do not just discuss their favorite bands or films, but are also keen to share their own knowledge and experiences with others. This is evident from the growth in user contribution to sites such as Tripadvisor, Wikipedia, and Yahoo! Answers. Tripadvisor is a travel information site attracting more than 20 million unique visitors per month, where the content is entirely provided by users themselves who have contributed nearly 5 million reviews on hotels and tourist facilities.[18] The online encyclopedia Wikipedia is one of the most trafficked sites in the world and is fed exclusively by hundreds of thousands of volunteers who dedicate their time to the creation of new articles and the improvement of existing ones.

These online community dynamics alter traditional patterns of trust: consumers, especially the younger generation, have more confidence in peer-generated or "crowd-sourced" content (see Figure 5). Online users are also increasingly relying on peer recommendations to make purchase decisions. In Europe, more than 50% of consumer electronics online buyers have checked product reviews from other customers, and 30% made a purchase on the Internet based on peer reviews.[19] Some companies are successfully leveraging user reviews and recommendations on their sites. For example, Netflix, an online movie rental service, has 5.7 million customers and members select approximately 60% of their movies based on user recommendations tailored to their individual tastes.[20]

15 Paidcontent.org, "Eisner to Provide Short-Form Video to MySpace," 28 March 2007. 16 Brand Strategy, "Pulling Power of the Digital Age," December 2006.   17 Hitwise statistics, 8 December 2006.   18 Company website; Comscore Media Metrix, July 2006.   19 Forrester, Trendwatching.com, 2005.   20 MarketWatch, "User Generated Content: Recap of 2006 and What to Expect in 2007," 4 January 2007.

Figure 5: Consumer Confidence in Peer Content (% of Online Users, US, 2006)

Source: Capgemini TME Strategy Lab analysis; eMarketer.com, January 2007.

Originality

Young people also want to stand out in their community and be regarded as cool, original, fun and independent-minded. The Internet has opened up a whole new world for this generation to indulge in creative self-expression and showcase their individuality. The younger generation is especially active in developing creative online identities through personal profiles on social networking sites such as MySpace and Facebook. Over half (55%) of online American teens have created a personal profile on these websites, totaling 170 million and 17 million users respectively as of January 2007, and a significant industry is growing to enable users to customize their profiles. Many 15–24 year olds use this avenue to share their own artwork, photos, stories, poems and talk about themselves. They want their creativity to be recognized and the Internet gives them a platform to do so.

To showcase their talent, young users are also increasingly using new professional-grade technology to create better quality content. Some players are actively providing these tools to promote innovation and harness talent. Microsoft, for example, has launched a set of development tools aimed at letting consumers create gaming content for its Xbox 360 console.

The technology-savvy and impatient younger generation is eager to showcase its creativity, stay constantly in touch with the community and control their media experiences. Against the backdrop of these emerging behaviors of the online youth, many wonder whether these trends are a passing fad or are here to stay. We believe that the uptake of many of these services is rooted in inherent consumer needs and as such, they will grow further into the mainstream. Some activities praised by the younger generation are already being adopted by all age groups. For example, close to 50% of MySpace users were over 35 in 2006, up from 40% a year earlier.[21]

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21 Nielsen/Netratings, 2006.

4 Recommendations

The telecom and media space is being reshaped by new consumer behavior, which will challenge the traditional, static, non-interactive and pre-packaged media experience. This presents several issues for players in the TME industry in terms of service offering as well as marketing. For instance, consumers now have an outlet to lend their expertise, opinions, reviews, recommendations and creativity and are playing an increasing role in influencing peers' consumption. This can have a significant impact on the overall view of the marketers' product, service and brand. Dell, for example, faced widespread consumer ire when Jeff Jarvis, an online blogger and a journalist, posted a blog on his frustration at dealing with the company's customer service and support. Telecom and media players, therefore, need to redesign their traditional relationships with the consumer, leveraging consumer involvement and insights at every stage of the product lifecycle and creating new sources of value to gain consumer attention.

I. Involve consumers in the creative/development processes
Internal sources of innovation such as marketing and R&D departments can be complemented by the active involvement of consumers. Consumers are increasingly interested in giving their opinions and expressing their ideas online. This trend towards greater user participation can be leveraged for product development, where consumers can become valuable test beds and an important source of ideas. For instance, operators could establish an "ideas blog," inviting suggestions, comments and ratings, or they could open up some of their applications to enable mobile mash-ups. Swisscom Mobile, for example, has set up an online "lab" that allows users to test beta versions of products, give feedback and submit new ideas.

Consumer-led innovation can help strengthen the ties between customers and brands, because consumers feel empowered by their involvement in the product development process. It can also benefit companies' bottom lines by ensuring that product development resources are deployed according to consumers' initial responses, thus increasing the chances of meeting consumer needs.

II. Recreate source of value to the consumer
The traditional provider–end user relationship needs a refresh as consumers desire more information, participation and control. Because ads can be easily skipped by tech-savvy and time-starved consumers, brands need to find ways to recreate engagement by adding value to their marketing message. One way for players to create value is to entertain them or enable them to improve their skillsets. This is what Nintendo did, for example, creating viral videos that advertise their Wii. The videos were uploaded on YouTube for everyone to stream, link to and comment on and were seen by over a million people on the Web.

Players can also create value to the user by giving them more control, allowing them to personalize, remix or modify content, thus satisfying their need for creativity and self-expression. The BBC allows consumers to creatively reuse free

of rights material from its archive and create mash-ups. This has led to the creation of mash-ups and user-generated applications such as "Fetch M4," which extracts traffic information on the M4 motorway in the UK for display on mobile phones.[22]

III. Weave strong relationships with online opinion makers

Consumers increasingly rely on the peer group and on social information websites to make their purchase decisions. For companies, it is critical to understand how these decisions are made and to try to influence them. Organizations need to identify and listen to emerging group of online experts, who are increasingly holding sway on consumers' choice. For example, for most social information websites (Digg, Wikipedia), the number of active contributors is actually more limited than one could imagine. In fact, only 3,300 contributors—2% of registered users—provide 70% of Wikipedia articles and a mere 0.2% of Digg registered users have submitted four stories or more.[23]

The same applies to blogging, where the number of blogging gurus is actually limited and clearly identified. While control over these experts is impossible and any attempt to manipulate opinion is dangerous, it is still important for marketers to engage with these influencers. Marketers should try to build a relationship of trust with these key online figures by providing information transparently and accepting both positive and negative feedback openly. Honda UK, for example, is the first sponsor of 2TalkAbout.com, which lets audiences freely publish their views on well-known brands. Honda engineers and associates regularly log on to contribute to and respond to feedback. This has helped the company to build an active community of customers as well as potential buyers who share experiences.

IV. Offer addictive experiences

In today's choice-filled world, engaging the time-starved and attention-deficient consumer is becoming increasingly difficult. Players need to look at delivering new and innovative services to capture the consumer's interest. Understanding what creates an addictive experience will be crucial to win the attention of the increasingly elusive consumer.

The growth in time spent on activities like gaming or social networking reveals that consumers have an increasing dependency on these services. In some cases, addiction can be extreme: For instance, users of World of Warcraft, a multiplayer online game, spend an average of 25 hours per week on the game. Social networking is also a very addictive activity: On average, users spend twice as much time on these websites as on traditional websites.[24] MySpace is probably the most addictive, as aggregated time spent on this website accounts for close to 12% of the overall time spent on the Internet in the US in 2006 (see Figure 6).[25]

The addictive nature of these experiences comes from the ability for users to not only interact with their peers, but also compare their status. Designers have ensured that users can showcase their skills and be rewarded accordingly: in "experience points" in the case of World of Warcraft or in the number of friends in MySpace. These "social currencies" are displayed for everyone to see in the user's profile. This helps to increase the social status of the holder and to reinforce addiction. Ultimately, addiction will grow as users enter the closed elite of "most experienced gamers" or "most connected people." In both cases, monetization levels are high and likely to grow: World of Warcraft generated more than €1bn in 2006 while Newscorp expects digital revenues to exceed $500m in 2007, primarily driven by MySpace.[26] Industry players should leverage these insights

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22 Patricia Seybold Group, "Outside Innovation at the BBC," October 2006.   23 The New Yorker, 31 July 2006; Publishing2.com. 24 80mn per month on average for social networking websites; 30mn per month on average for traditional websites; source: The Online reporter, September 2006; Comscore Media Metrix, 2006.   25 Compete.com, 2006.   26 Online Media Daily, "MySpace Brightens Newscorp Earnings," 10 May 2007.

and replicate these distinctive forms of addictive community interactions by emphasizing features that let users compete with each other and showcase their skills and creativity.

Addiction patterns are also evident on the mobile. The mobile phone, in fact, is the preferred device of the new generation and is the hub of their social life, using it to permanently keep in touch with their community. In a UK survey of media preferences in 2006 (see Figure 7), the most missed media activity was television for all age groups except 16–24 year olds, who nominated the mobile phone. However, older age groups are also showing increasing dependency on their mobiles, with 25–34 year olds placing it second. In order to sustain this and drive similar patterns for other older age groups, mobile operators, developers and

Figure 6: Most Popular Websites by Percentage of Total Time Spent Online by Internet Users (%, US, December 2006)
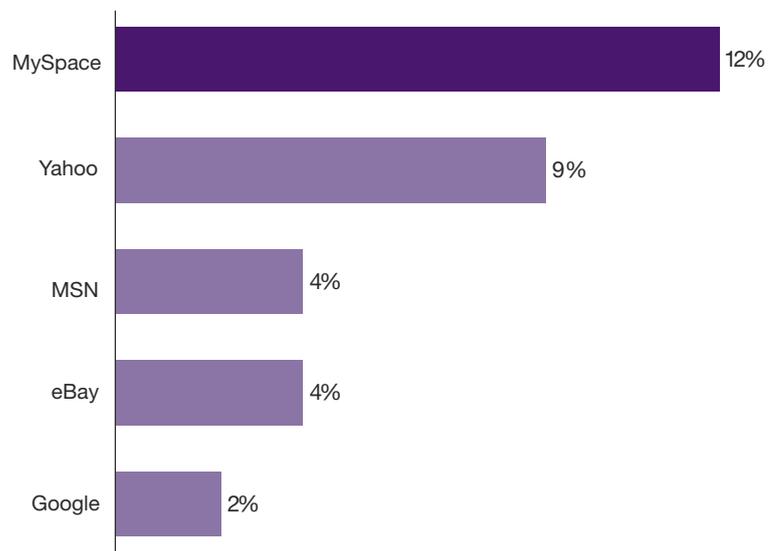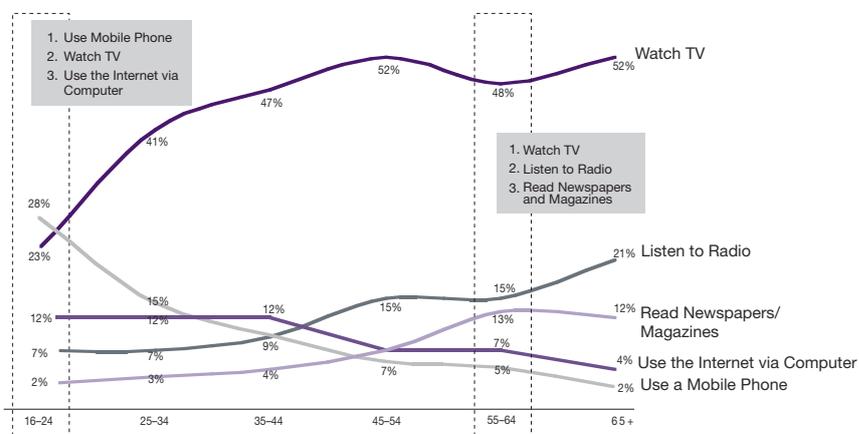

Source: Capgemini TME Strategy Lab Analysis. Compete.com, 2007.

vendors must work together to embed more features that match the needs of older generations, such as home management, banking, healthcare and not only community, entertainment and communication.

Mobile services can offer solid monetization prospects: consumers show a higher willingness to pay on the mobile platform than on the fixed PC-based Internet. Consider for instance that in a survey conducted by Capgemini across the UK and France in December 2006, 80% of respondents interested in mobile IM were willing to pay an average of around €3/month. Industry players should work towards developing mobile services beyond voice and messaging. Extending social networks to mobile devices, for instance, can enable operators to generate new revenue streams since many consumers upload content captured over their cell phones. For example, SK Telecom's mobile social networking site, Cyworld, had a paid user base of around 0.7 million consumers in 2006 with an average ARPU of €4.3 per month.[27]

27 Company website.

Figure 7: Most Missed Activity by Age (UK, 2006)

Source: Capgemini TME Strategy Lab analysis; Ofcom, Media Literacy Audit, May 2006.

In conclusion, the online world is increasingly full of consumer advice, suggestions, complaints and creations. This embodies the fact that people want to be more involved in what they consume and how they consume it. This is exemplified by the 15–24 age group. The increasing roles digital technology is playing in this group's leisure activity are an indicator of what the medium- and long-term future hold for telecom and media consumers. The changing behavior towards media and communication exhibited by this age group will become mainstream as they mature and their digital habits cross the generation gap. Players willing to listen, learn and incorporate consumer insights will be able to offer innovative services and gain in the long run.

About the Telecom, Media & Entertainment (TME) Lab

Telecom & Media Insights is published by the TME Strategy Lab, a global network of strategy consultants dedicated to generating content-rich insights into the telecom and media industries. The Lab conducts in-depth strategic research and analysis to generate leading-edge points of view on crucial industry topics that stimulate new ideas and help drive innovation for its clients.

Lab activities include:

- Research points of views on emerging industry trends: The Lab develops indepth strategic research reports on emerging industry issues that are relatively under-explored, but have significant implications for players. The Lab conducts these studies independently or in collaboration with external partners.

- Monitor key developments in the telecom and media market: The Lab closely monitors key developments relating to selected industry topical issues. This research is updated quarterly and generates data and insight-rich reports on the selected industry topics.

- Bespoke research and analysis: The Lab delivers highly value-added strategic research and analysis projects to clients, addressing crucial issues relating to their business.

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