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Environmental Research Scan – Technology, Media and Generational Expectations **A Framing Document**

Context: Media in Transition – Culture in Transition

“The proper artistic response to digital technology is to embrace it as a new window on everything that’s eternally human, and to use it with passion, wisdom, fearlessness and joy.”

Ralph Lombreglia, In Technology

At the risk of sounding filled with pre-millennial era over-excitement this scan will start with an assertion that the past 10 years have borne witness to easily one of the most significant waves of communication development our global culture has ever witnessed. It seems like only yesterday that media and communications specialists spent many hours per week convincing clients of the merits of, say, online survey fielding or a CRM program that exists only online. That, as they say, was “then” (AKA: 2001) and we are all now, a scant decade later, living and working in a world where digital technology is an inextricable and a well understood part of our lives – regardless of generation.

To be clear, different generations have approached, and continue to approach, this rise of digital technology from a variety of different vantage points (identified later in this scan document) but it is absolutely important to understand that digital media and communication have become ubiquitously accessed and utilized, to varying degrees, by ALL generations.

Of course, technological shifts come with a requisite linked set of cultural shifts. In an unceasing dance of point, counterpoint and balance social cultures breed technology and vice versa.

What is particularly interesting about this specific point in time, and also particularly challenging for any of us figuring out the most efficient ways to reach people with messages of any kind, is the pace at which new communication media is begetting socio-cultural change.

First and foremost as an agent of cultural change has been the current swift shift from “push” to “pull” media. We are, as we speak, part of a specific culture where consumers of media (this means our entire society with the exception of extreme, off-the-grid types) are very quickly embracing the idea of being fully in charge of how, where and when they receive their messages, entertainment, information and the like.

As perhaps the most obvious example, gone in the not too distant future will be the days when most broadcasters can dictate when certain shows are watched or listened to. One need only look at the iPods and iPhones (or reasonable facsimiles) on the majority of young Canadians today or observe the currently ceaseless rise of PVR ownership amongst households to see this transfer of power happening before our eyes.

The effects are not just in terms of reception of prefabricated content; an equally robust revolution is happening in the creation of content arena as well. Here, digital technology has made mainstream the creation and public dissemination of one’s own art, thoughts, movies, music and other obsessions. Blogs, cell-phone movies, GarageBand, myspace, Facebook, YouTube channels, Twitter and an unending stream of other different, cheap and increasingly universal media resources all are concurrently contributing to a more democratized mediasphere than any of us have ever seen.

The cultural results from this “push” to “pull” transition, and we can see these already blossoming all around us, are vast and varied. For instance, with increased access to wildly different perspectives on current events and information has come an ascendant focus on making one’s own mind up about issues versus taking a given organization’s priorities and points of view as some sort of public gospel. Or, from a consumer marketing perspective we see this notion of the “consumer being in charge” coming to life in the form of more choice, more information and more direct consumer involvement in product development, marketing and communications strategy and branding.

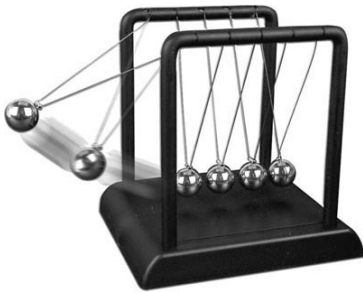
On an even more far-reaching level, we’re seeing this gradual “dis-acceptance” of rules and parameters from another, generally less inclusive, media time having visible repercussions on how Canadians are viewing ANY pre-established mechanisms of social order. This has been traditionally embraced by today’s younger generations (Millenials and Gen X) but increased notions of “demystification” exist across the generations.

For example, organized religion is starting to take a back seat to the “defining of one’s own spirituality” while simply “having a lifelong partner” is becoming more important to younger Canadians than traditional marriage. Even the mighty building blocks of our modern, industrial society; the corporation and the nation state, are being increasingly scrutinized with second thoughts and reinvention as Canadians, young and old alike, start to question any constructs they feel have been foisted upon them without any rethinking to suit today’s changing social context.

This is the mediascape and the linked culturescape within which this environmental research scan currently exists.

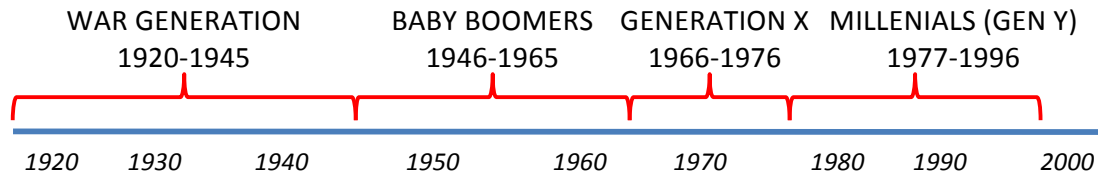
There are, however, some interesting hypotheses based on new trending amongst society in general, and Millenials in particular, (as studied and noted by Youthography’s “Ping” values and consumer self perception studies 2006-2009 and Environics’ Social Values Monitor, 2007 – present) that are starting to illuminate a resurgent interest in what some might refer to as more “traditional” values.

These studies are ongoing and currently inconclusive but very interesting and, we believe, important to understand and monitor as time marches on. Akin to Newton’s Cradle (seen below) culture has a tendency, historically, to move slowly forward via the action / reaction of socio-cultural extremes.



Generational Trending – The Four Key Groups

Based on norms identified in this scan we will be looking at four key generational groups alone. There are “cusp” groups which tend to complicate things rather than improve understanding and, as such, we will not include them in this context. Stats Can relies heavily on these classic generational breaks and, in turn, so have the vast majority of research houses in North America.



War Generation:

This generation is made up of people who fought in or lived through part of WWII, the most formative event in the last century for Canada. Age ranges 65 and up

Boomers:

The product of the Veteran generation in the post-WWII euphoria. Characterized by leadership, activism and the rise of pop culture, driven by TV. Age ranges 45 to 64

Generation X:

AKA the Bust or the Lost Generation. Veterans had WWII, Boomers had TV and Millennials were born digital. This group had Douglas Coupland and the Breakfast Club. The smallest demo in size and years. Age ranges 34- 44

Millennials (Gen Y):

The product of the Boomers. They are the second largest demographic in the country and are hugely influential to other generations due to their influence on the Internet. Age ranges 14 to 33

Generational Trending – War Gen

“These senior internet users are taking advantage of new communication technologies and engaging in a variety of online activities that go far beyond sending emails to friends and family, checking for weather or searching medical information. Contrary to the age stereotypes associated with older adults and/or portrayed in the media, many seniors are forming online communities, looking for friendship, companionship and love with other seniors – just like people in any age group do.” – “Are you on Facebook? Senior and New Communication Technologies”, Mei-Chen Lin, Kent State University, in media res – a Media Commons project, 2009

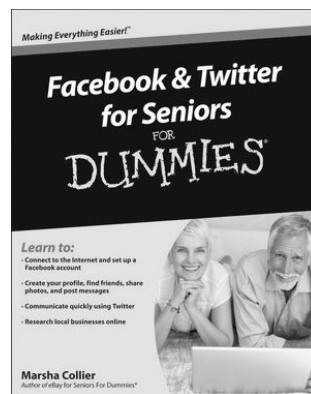
The slow but increasingly steady adoption of new communication technology and new media by the oldest generation reviewed in this scan is perhaps the most potent window into the broadening ubiquity of online communication in our culture.

Having lived through the austerity of both the Great Depression and the Second World War, this generation believes in hard work, firm ethics and, having learned to live on modest means in the past and into the present, cherishes the basics of human interaction and legacy; to say they are change resistant would be quite an understatement.

Despite all this, this scan has noted a strong movement wherein adoption of new technology and communication by the “war gen” is now not just an aberration but a bonafide trend.

Email and photo uploading, not surprisingly, top the list of increasingly common ways that seniors can stay in touch with each other and, importantly, their extended family. Web-surfing, though not their preference or priority when it comes to shopping and buying, continues to increase as a go-to resource for news, information and, yes, the weather. Mobile phone penetration, however, is quite low for this generation set when compared to others and less than 10% have some sort of net-capable or “smart” phone.

Interestingly, a growing percentage of 65+ seniors are discovering the joy and efficiency of connecting with others online via social media. Unlike the groups on some of the younger social sites, the sites for older users tend to be less superficial and have a more grounded community with top focus points including sharing life experience, connecting with others that share a specific interest in games (online gaming is becoming very seniors-driven) and travel. Some are also looking for companionship and romance online via social media but this is more the purview of “seniors” in the 50-60 age range.



These very compelling trends aside, it is important to understand that this generation prefers direct communication and enjoy real customer service representatives, as an example, at the end of a line (who doesn't really?!). Most continue to be strong users of traditional media including newspapers, radio and television and see the internet predominantly as an augmentative element in their daily information,

entertainment and communication routine. Beneath their growing use of online communication there still lies a deep suspicion of technology and, in many cases, some resentment that this new technology, and the cultural changes that come with it, have been set upon them often without concern for their established preferences.

Communication expectations of this generation include:

- being clear and straight forward in your intent, call to action and desired next steps
- websites being clean and very easy to navigate
- large fonts where possible
- providing opportunities for different modes of communication (i.e. providing them with options to receive updates in the mail in hard copy format, having a customer service line with real people ready to take their questions)
- providing technology training (again, through personal communication via the phone would be best but even a step by step process online could help – just don't assume they will know all the ins and outs of something as basic as uploading information)
- address them formally (Mr. Mrs. Miss etc.)
- not mixing informality with important formal information (they are very compartment-oriented; they don't expect nor like, for example, to see lifestyle cues and an informal tone mixed in with messages from their lawyer, bank or credit union)
- a respect for their privacy (too many questions in forms, online or offline, is galling to many of us regardless of generation but this generation is particularly sensitive here; potentially sensitive questions or information should be handled in person with this generation to breed comfortability)
- show respect for their age and experience in your communication
- use proper grammar (this generation is very prone to bemoaning the "decline of language" in contemporary society)
- consistency and uniformity in communication (this is especially the case when it comes to institutional communication; changing up processes and even look, feel and navigation of a website will put them off)

Generational Trending – Boomers

“Boomers expect that technology will help them live longer and better lives and keep them connected to family, friends, co-workers and, eventually, healthcare providers. To fulfill these expectations, Boomers are turning to social media, where they keep up their offline social connections and make new ones. Online marketing messages that help them build their connections – and foster other online relationships – will get their interest.” – Lisa E. Phillips, eMarketer senior analyst (as quoted in “Social Media Use Among Teens, Boomers and Moms: New Studies Reveal Great Insight, Social Media Examiner, March 5, 2010

Generational Trending – Gen X

It has been said that Baby Boomers (“Boomers” or their new Moses Znaimer-crafted nom du guerre, “Zoomers”) are masters of reinvention. Their oldest members were born into the optimistic but still ration-conscious Post War era and then went on to invent the mass media and consumer culture that continues to dominate our culture. Within this timeline they also found time to rebel, to a certain extent, and reap the benefits of political protest, rock music and sexual freedom (sex and drugs and rock and roll). Today, as mature and generally prosperous citizens of a culture they played a huge role in creating (for bad and for good) they are enjoying the fruits of their labour and, in no small way, are quite protective of their position in society. It is no coincidence that Boomers are the generation that is most suspicious and maligning of the Millennial generation; after all, the Millennials are just a few percentage points shy of taking over the Boomers’ top position in terms of percentage of population. This type of protective mindset (of their socio-cultural hegemony, of their assets, of their attitudes to life) is one of the Boomers’ current attitudinal signifiers; open-minded and rebellious in their teens and twenties many Boomers are now rather conservative but don’t like being reminded of this.

Boomers are currently struggling with their identity and impact within our culture and, as such, in the spirit of both reinvention and protection, are currently asserting themselves strongly as “not old”, “not senior” – not “over”. The cues are everywhere; from the Canadian Association of Retired Persons re-branding itself and its members as “Zoomers” (“Boomers with zip!”) to notions that “60 is the new 40” to a whole new set of businesses catering to the vibrant life aging Boomers want to feel a part of.

This generation’s reaction to new trends in technology and communication can be summed up as enigmatic.

The majority of Boomers have embraced mobile phones and the Internet but still are known to love and respond to direct mail (an attitude born during the heyday of direct mail in the 80s) and often need printed materials to seal the deal when it comes to large scale purchases or decisions. Print is also often something well-received by Boomers to reinforce important communication (i.e. insurance, banking, etc.). Email is almost ubiquitous with this generation but texting and text messages from institutions or organizations are not all that well adopted by this group; it’s seen as “kiddy” and they prefer messages, even online, that have a prose tone to them.

On the social media front it is Boomers that helped fuel the mainstreaming of tools like Facebook and, especially, Linked In and there is a huge new arena of Boomer-exclusive social media forums and sites aimed squarely at this new “Zoomer” attitude and lifestyle. Importantly, relationships and romantic involvement drive a lot of this new social media for Boomers.



Boomers use the Internet widely for news and information and see the web as a great tool for their ever-present need to find a good deal; they brought us consumer culture as we know it after all so they like to buy a lot but they like to get a good deal while doing so. The Internet, however, is still not THE source of entertainment as it has become for today's youngest generations; they see it more as an adjunct to their entertainment pursuits – something to add to their enjoyment of a TV show, music they like or a movie but not its original source.

Finally, our scan has shown that there is a specific group of Boomers, predominantly working and academic class, who have not used computers extensively in their working situation and have not kept up with their children technologically. This group is often quite set against the Internet and mobile telephones but a little scared to show their ignorance (much more so than the war gen who freely admits they don't get it and ask eagerly for help from younger generations). However, as this group ages and retires it is surmised by most who study communications trending that they will, in turn, embrace this technology and the non-users will become a very small minority.

Communication expectations of this generation include:

- NOT lumping them into the “senior” or “war gen” category
- communicating with them as if they are completely in-step with new media while providing opportunities, on the sly, for them to figure things out on their own or with help from a customer service rep
- providing an arena for them to offer suggestions, vent, be critical, get their opinion out (but it kind of ends there; they talk a lot about consensus-building but they are not the best collaborators – think discussion boards and not full-on, online collaborative tools)
- treat them as special or “unique” (“your opinion is very important”)
- rewards for effort on their part
- giving them a forum to demonstrate to others what they know
- providing lots of detail (they love to read, compare and cross-reference and are the generation that adopted the watch-words “always read the fine print”)
- provide opportunities for important statements to be printed (they are still big on hard copy file-keeping)

Generational Trending – Gen X

“More resourceful and resilient than their elders, this generation is sometimes known as the ‘lost generation’ squeezed between the boomers and Gen Y. They have been regarded by some as ignored and misunderstood. Well educated and qualified, Xers are sceptical of authority and have a focus on outcomes and skills. Xers are good researchers, using the internet extensively. They love interactive communication and their intelligent use of search engines means that marketers have to put the right bait in their way to get a hearing. In many ways this group is the most challenging to reach as they are so busy in all aspects of their life that ‘information overload’ is a constant state for them.” -

“Communicating with Baby Boomers, Gen X and Gen Y”, Martin Long, NFP Analysts, 2010

Generation X represents a small percentage of our population but have enough strongly identifiable characteristics that separate them from their immediately older and younger generational counterparts to make them worthy of individual note. They are typecast, fairly accurately we might add, as being cynical, curmudgeonly, creative and fiercely independent.

They are cynical because they feel, as a generational group, they always existed in the shadows of the Boomers and have never received their “fair shake” as true thought leaders of our society. Gen X has been waiting for the Boomers to retire and to take what they see as their rightful place at the helm of our culture but things aren’t really working out the way they had planned; instead, the Boomers are busy reinventing themselves within the context of our new mediascape with many holding off on retiring or starting their own businesses. This irks Gen X.

To make matters worse, they now have another huge demographic bubble on the other side of their generation, the Millennials, who have captured the imagination of our culture writ large with their pragmatism, optimism and new ways of consuming, communicating and creating.

It’s tough to be a Gen X’er – so the attitude goes. And one can’t blame them for some sort of resentment; the original ideas and independent thought they rightly created and espoused (driven in no small way as a rebellion against the over-riding rule of Boomer thought as Gen X’ers were growing up) seem to have been lost in the shuffle – this is where the curmudgeonly attitude comes in.

They are skeptical of the older generation’s consumer culture program and relatively conservative ideals and, at the same time, roll their eyes at the openly optimistic (Gen X’ers would define it as naïve) attitudes of the Millennials. One need only listen to the pop music identifiers of Gen X culture (namely “grunge”, “industrial” and “old skool gangsta rap”) to get a real feel for this generation’s particularly hard-ass zeal for independence and conflict.



On the media front, Gen Xers are major players. They were our society’s original “netizens” and played the dominant role in developing the Internet and web-based office systems (hello Microsoft and Apple) we know and love today – Gen X’ers ruled Silicon Valley in the back 90s. As such, they are extremely proficient in all

manner of net-based communication; search engines are a go-to resource, they are very big in the social media sphere (though they are starting to believe a lot of Facebook culture is creating a “herd” or “lemming” mentality in our culture), email is their workhorse, texting is something they regularly do, Skype was created by and for their increasingly international working needs and...you get the picture.

Having grown up during the rise, and subsequent fall, of modern music video culture (via MTV, MuchMusic and the like) they are incredibly pop culturally savvy, visual and, when combined with all their original web dexterity, they became an awesome creative force in our culture with a fiercely independent and anti-establishment streak; “f%*k the man” is definitely part and parcel of this generation’s overall attitude. Still, television and other traditional mass media continue to play a role in this generation’s overall approach to life as they were there during the cusp years between traditional and new media.

They are also very, very busy with work, family, debts and all the other trappings of a generation in its middle age so it’s very hard for communications to cut through with this generation. They are skeptical and suspicious of formal or institutionalized communication from the get-go (ads, policy platforms, religious messages, notes from their bank – they are all there to be “demystified”), dismissive of new ideas if they reek of optimism or youthful naivete and, on top of this all, many Gen X’ers simply don’t have the time to take in or consider any communication other than those from their close circle of peers or the lucky few organizations that have managed to be invited in to their inner sanctum.

Communication expectations of this generation include:

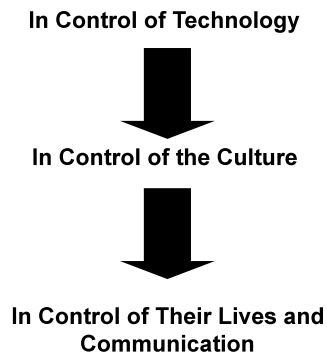
- using pop cultural cues succinctly (and cheekily) to cut through with smart, effective messaging; show you “get it” and you can overcome their initial cynicism
- focusing on the efficiencies created by web-based communication and not “dumbing things down” for the sake of other, older, generations
- focusing not only on their work and career needs but also the creative lifestyle they always want to have (this is a generation that “works to live” because they saw their parents “live to work” and found that intellectually and artistically stultifying)
- focus on the “me” and not “the collective”; notions of consensus and the collective ring “airy fairy” to this generation
- providing an approach to authority, next steps and timelines that is not seen as overly “from the top” (they have a casual approach to authority)
- being “lean and mean” – they simply don’t have the time nor inclination to read too much
- a focus on the visual and on design (bullets, graphics, headlines)
- reward them for efforts with some sort of freedom (from further paperwork, drudgery and email inundations)
- refine your core message down to the most essential “what you need to know”

Generational Trending – Millennials (Gen Y)

“Today’s millennial generation is more engaged in the actual creation of culture and media than any previous generation with roughly one in seven young Canadians aged 14-34 directly involved in creating culture. This cue, among many others, paints a picture of a young citizen consumer who is more engaged in, and more discerning of, cultural output than previous generations ever were and they expect the organizations, brands, icons and anything else that they let in to their lives, to follow suit. Increased cultural presence and power is now more in the hands of modern citizen-consumers than ever before.”

– Mike Farrell, Partner and CSO, Youthography, “Digital Cult to Digital Culture”, 2009

As Martin Luther exemplified back many centuries ago with his savvy use of the then new invention of the printing press – those who are in control of technology are, in turn more in control of culture and thus become much more confident in their own lives. The Millennials live this model in spades.



Though not the original netizens, the Millennials (sometimes called “Gen Y”, “the Google generation” or the “iPod generation”) are the first generation to be born into the modern technological mediascape and, due to their timely arrival on the scene right as this modern-day printing press was being assimilated wholly into the very fabric of our culture, they have been elevated more quickly than any generation that came before as creators of culture and trend-drivers. This suits them just fine. It also makes them demanding and some would say needy.

Values studies, done by the likes of Canada’s Youthography and Environics or America’s Teen Research Unlimited, have shown this generation to be generally optimistic, highly social and, quizzically, rather moralistic. Their zeal for life and “finding the right answers” is often seen by older generations as overly ambitious and impatient and both the Boomers and Gen X resent the way this generation has been treated as “special”.

This special treatment comes not only from their fortunate arrival time in culture as media was changing but also from their demographic background; they competed with fewer siblings, were the happy recipients of a “respect the children” attitude promulgated by Boomer liberalism / hedonism and enjoyed economic stability and growth in their formative years. They wanted for little growing up and now they want prosperity and work on their own terms – something they have been particularly successful at demanding and receiving.

Despite the comparatively lux upbringing they continue to diminish the role their Boomer parents have played in their lives and on society and don’t relate at all to the fierce attitude of Gen X. They do, however, share a lot

of moralistic ground with “war gen” seniors and time will tell if this will turn into a new form of moral conservatism.

The majority of Millennials continue to be unmarried, unencumbered with children and many reside at their original familial home into their late twenties; expect a boom of births in the next decade.

When it comes down to the media and communications landscape Millennials are the first real social media generation; the key to managing this group in any organizational framework is to change from a “command and control” model to one of “inclusion and collaboration” – a big step particularly for Boomers who tend to be much more focused on authority and hierarchical structure.

Millennials have a complicated and strongly inclusive tribal structure that has all but eradicated many traditional hierarchical models of organization and long-established compartments within culture. The lines between the personal and private (hello Facebook), work and social life, play and competition have all been blurred by this generation’s heretofore unheard of access to information and people; different perspectives from differing sources is at the core of this generation’s approach to life, decision-making and communication. A happy result of this media-created social attitude is that the Millennials are less niche and clique-driven than any previous generation; they are also much more neutral or “blind” when it comes to gender, culture and religion.

Speed and response is also a huge prerequisite of this generation when it comes to any form of communication; they expect (some would say over-expect) an almost instantaneous response to any questions or demands they have and they often expect this to be done in a public forum – much to the chagrin of government and other large organizations that are very adverse to doing things so openly. They are the highest users of text messaging, instant messaging and social media.

Multi tasking comes naturally to Millennials and they do very well with a variety of different stimuli when it comes down to communication. On the advertising front, the peer to peer network (word of mouth advertising on steroids) is more important than any traditional “brand-vertising” campaign ever could be - however delivered.

To communicate successfully with Millennials one needs to employ and leverage every possible technological medium, backed up by good quality brand support that is informed, on an ongoing basis, by Millennial attitudes and thoughts to whatever it is one is communicating. It is very important to let this generation know they are a vital part of a communication “loop” and that this loop is ongoing.

It is important, however, to not miss the important balancing role that authenticity plays currently with the Millennial generation amidst all the technology they own and use to connect with one another. Youthography, among other noted research houses in North America, has been very vocal over the past 4-5 years about the almost traditional perspectives the Millennials have when it comes to a search for “truth”, honesty and real experiences. One only needs to look at the current rise of concern about the environment, the vogue of traditional acoustic-based music and what Mike Farrell (former CSO at Youthography) has dubbed “the commoditization of experience” to see how the Millennial generation is acting out its need to find flesh and blood amidst the metallic sheen of modernity.

Of course, as this generation has so much information and access available at their fingertips and through their various visual monitors (TV, computer and, now, smartphones) authenticity is something that can be immediately investigated and, if not real, immediately exposed and castigated on a very wide scale – and quickly. This being the case it is helpful for organizations to ensure that Millennials are playing a major role in developing, and then managing, their communication process. Working WITH them is imperative.

Communication expectations of this generation include:

- relying heavily, if not exclusively, on digital media; smartphones are increasingly important with this generation as what some are calling “the third screen” in their media world becomes very well utilized (applications or “apps” are a compelling area to research here)

- employing, where possible, inclusive media that provides the reader with access to other people's perspective on a given topic (this is a Facebook generation)
- provision of networking opportunities
- provision of educational / skills development opportunities (they are always trying to better themselves and like to learn from others' experiences – this also arms them with a bevy of different skills to employ in their life and increasingly entrepreneurial careers)
- a feedback loop – and frequent (if you say you are going to be doing something they will hold you accountable and expect change quickly – allow them in to this process and their glare will subside)
- fishing where the fish are, and at the right time (nano-marketing and occasion-based communication plans are essential)
- keeping the messages succinct and response easily actionable, and with a system ready for response (Millennials do tend to read more than their Gen X counterparts though)
- provide structure but do it with a rationale that explains “why”
- injecting lifestyle and pop cultural cues into the overall communication as an acknowledgement of their “always on” multi-tasking / multiple viewpoints perspective
- reward their actions by doing something “good” for the community (global, local, tribal – depends on the message and source of that message)

Summary: How to Optimize across the Generations

To optimize communications strategy based, in part, on important generational understanding as documented in this scan, we also understand that most organizations are not in the position to afford full and outright segmenting of their communications along generational lines – nor is this always necessary.

Taking a look, as a for instance, at the basics of a website - the design, layout, structure and content of the website should, in all cases, be simple, clear and fast to navigate as that suits all users. With cascading levels of detail a communication strategy can help capture both the furious multi tasking Millennials while satisfying the more comprehensive research needs of Boomers and Gen X.

On the more stratified level, email campaigns and linked promotions, are two examples of many options, can be directed to each segment, using appropriate language and highlighting the benefits, tone, lifestyle cues and even separate media tools (such as user forums that will be of more benefit to Millennials) that will appeal to each generational segment; direct mail options for seniors and text-based bulletins for Millennials that opt in are two obvious cases.

Differing needs necessitate different methods and it's not always, thankfully, going to be the case that each generation is tackled separately.

Of course, getting messages out to different generations when they are in both the mind-frame and setting to receive them well and, fundamentally, interact with them is going to be of great import moving forward and there is no doubt that where these intersection points exist is going to differ dramatically from generation to generation – and change routinely. Luckily, a whole new suite of dynamic tools and opportunities in the online arena are there for your consideration as potential backbones of an evolving and contemporary communications framework.

In summation, it will be ever-important, smart and efficient to place equal weight on what these generations have in common as to where differences exist.

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