

WHITE PAPER

MILLENNIALS AND SOCIAL MEDIA



FALL 2010

“

Social media is changing our lives and our society: It makes us more sociable, more global, and more informed. These digital communities are like a second world that each day turns more important to us.” —CARLA LOZANO, Account Group and Planning Director, J. R. Vallejo y

Asociados, Ecuador

For most people living and working in developed parts of the world, it is difficult to remember life Before Digital—the time before computers, Internet, and mobile phones. For those under age 25, it is not just difficult but virtually impossible to remember such a predigital existence. A world full of constantly improving digital technology is the only world this generation—the millennials—has known. They are true digital natives, born into a world of bits and bytes.

It might seem, then, that the use of—and comfort with—digital technology would mark a real divide between the generations. In truth, older generations have embraced this technology as eagerly as their younger counterparts. The true divide lies not in the use of digital technology but in the use of *social media*. Older generations are leery of social media (SoMe). They say they don’t have time for it. They don’t really get what it’s for. (“Why would anyone want to read about what other people have for breakfast?”) They wonder if it’s all just a fad (and hope it is). They get anxious about the effects of SoMe on young people’s brains, on their social skills, on their health, and on their safety. They perceive cyberstalkers, scammers, and confidence tricksters behind every post and tweet from an unfamiliar source.





Of course, some members of older generations actually do use social media, but they are more apt to do so tentatively, with frets and doubts and nervous glances over their shoulders. In contrast, millennials don't give a second thought to SoMe. It's there, so they use it. They hear about a new product, service, or app, so they try it out; they switch, they mix, and they match on the fly. Both socially and biologically, things are so much more unsettled and fast-changing for people between the ages of 18 and 25. It's a time of transformation and experimentation, a time for trying out different identities, a time for figuring out different ways of doing things and new ways of being. Today's millennials are grabbing hold of the tools of social media and experimenting with them with a generational ardor probably not seen since the baby boomers raised their tie-dyed flags and vowed to push into place a new world order.



Back in the heyday of the boomers, many believed rock 'n' roll and youth power would change the world ("We can change the world/Rearrange the world"). Several decades later it is clear that they were right in so many ways, for better and worse. Now, in the heyday of the millennials, there is no musical movement sweeping away the old. Instead there is social media. In the words of blogger Max Gladwell (aka Rob Reed) on the essential social media blog [Mashable](#), "Our children will inherit a world profoundly changed by the combination of technology and humanity that is social

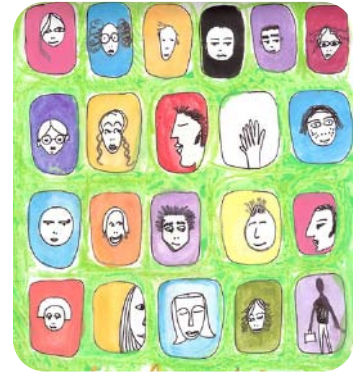
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In China, it is mainly youths aged 15–30 who are using social networking platforms—and, with this usage, the younger generation is becoming more closely connected and engaged with each other. People interact through the use of comment threads, games, pictures, videos, notes, status updates, and live chats. They now live both real life and virtual life on a single platform.” —SIMONE ZHANG, Strategic Planning Director, Euro RSCG Shanghai



media. They'll take for granted that their voices can be heard and that a social movement can be launched from their laptop. And they'll take for granted that they are connected and interconnected with hundreds of millions of people at any given moment."

Far be it from us to proclaim yet another "X is the new Y," but we do think there's a growing case for the view that, in generational terms, social media is for millennials what rock 'n' roll was for baby boomers: a new and powerful phenomenon that shapes not just attitudes and behaviors, but also how the generation perceives itself. Without a doubt, social media will turn out to have been one of the most important shared phenomena shaping the culture of millennials around the world. Perhaps even *the* most important.



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Whether as marketers or as parents, utilizing social media will be key to understanding this new generation.” —SERHAT AKKILIC, Managing Partner, Project House Euro RSCG, Istanbul



KEY FINDINGS FROM EURO RSCG'S SOCIAL MEDIA AND MILLENNIALS SURVEY



REACH AND USAGE BY COUNTRY April 2010 (Home & Work) Social Networking/Blog Sites

Country	% Reach of Active Users	Time per Person/Month (hh:mm:ss)
Brazil	86	5:03:37
Italy	78	6:28:41
Spain	77	5:11:44
Japan	75	2:50:50
United States	74	6:35:02
United Kingdom	74	5:52:38
France	73	4:10:27
Australia	72	7:19:13
Germany	63	4:13:05
Switzerland	59	3:43:58

Source: The Nielsen Co.

To put meat on the bones of our hypothesis, we commissioned a large-scale online survey in five countries: China, France, India, the United Kingdom, and the United States. The survey was fielded through our partners MicroDialogue in summer 2010.

In each country, we quizzed 600 respondents, equally split between men and women and divided between two age cohorts: 100 people aged 40 to 55 (average age 47.1) and 500 millennials aged 18 to 25 (average age 22.4). Total sample: 3,004.

This white paper also draws on third-party data to deepen and build out our insights.

SoMe Is Today's Social Glue

The pioneers of the Internet were fired up by its ability to abolish distance and time. Even back in the dial-up days of the 1990s, it was possible to connect quickly with people anywhere on the planet—New York, London, Moscow, Cape Town, Mumbai, Singapore, Sydney—anywhere with an Internet service provider. The media headlines carried news of strangers connecting from far-flung places. Now that hundreds of millions of people have always-on broadband and wireless services, the promise of anywhere-anytime has been fulfilled; all those world-spanning connections can be instant. And unlike in the pre-Internet snail-mail days of pen pals, today's international Internet friends can connect instantly with chat messaging, VoIP calls, and live video chats.





Social media has become antisocial media. People are confined to their homes, Internet cafes, alone and isolated, lacking intimacy. Some people are turned off by the lack of intimacy and face-to-face interaction; they disapprove of the coldness of cyberspace. And so, even as we are seeing new and unique social networking sites coming up to challenge the pioneers/leaders every day, we are also seeing new sites promoting the reconnection of people offline. Social media will become more mainstream once there is more of a meeting of the online and offline worlds.” —ANTHONY K. ROXAS, Strategic Planning

Director, Euro RSCG Manila

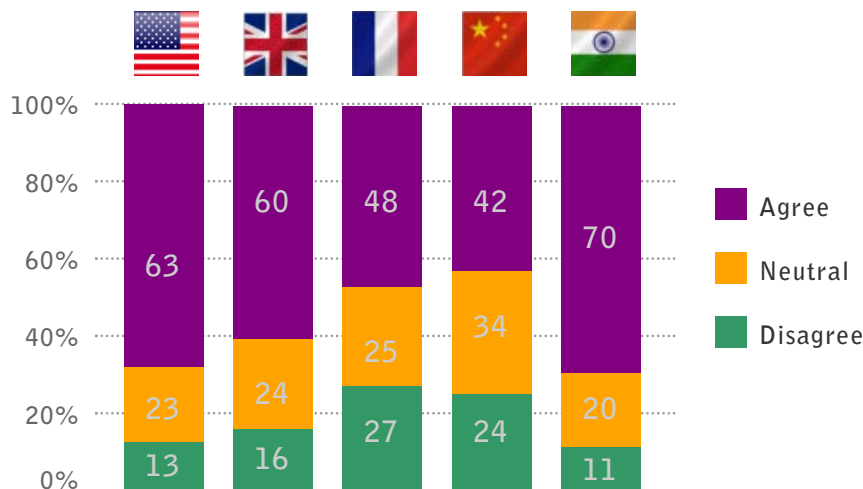
The real gut-level appeal of social media doesn't lie in its scope for making random connections with far-off strangers, however. It's not even about the lure of finding people in other places who have similar interests, such as the love of a particular band, brand, or activity. For the great majority of users, the biggest appeal of SoMe is the way it allows more frequent and more intense interactions with family and friends (and sometimes friends of friends) closer to home. It's the way it enables people to keep up to date with each other quickly and easily every day, in between phone calls and face-to-face meet-ups.

The fact is, social media tools are fast becoming the most useful and effective ways to achieve some very basic human needs: connection, conversation, and a sense of community. In our survey, we asked respondents to rate their agreement with the statement "One of the main ways I stay connected with friends is through social network sites." Well over half the millennial sample (56 percent) agreed, with fully one-fifth (20 percent) agreeing strongly and only 18 percent disagreeing.



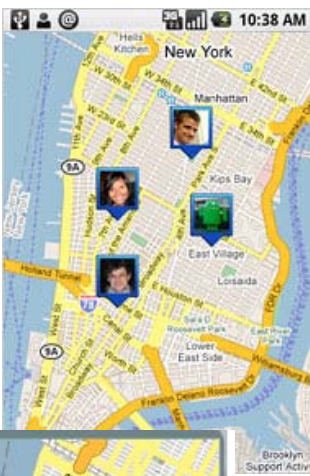
"ONE OF THE MAIN WAYS I STAY CONNECTED WITH FRIENDS IS THROUGH SOCIAL NETWORK SITES"

(Millennials)



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One thing people like overall in social media is that it is private, personal, not influenced by people they don't want to influence it. People complain about advertising in social media, but they accept it as they accept billboards and other outdoor advertising. As with outdoor, marketers can 'connect' with people traveling a certain route, but they will not ride with them in their car. Some roads will be more traveled than others. You don't post a billboard on a road just because it exists; you only post billboards on the roads that lead to your store.” —**DAVID QUIROA**, Associate Creative Director, ICU Publicidad, Guatemala City



Most of the big social media services started in the United States, and American millennials are no laggards in using SoMe as a mainstay for connecting with friends (63 percent do so), but they're not the exception. Large percentages in the other countries also agreed with the statement, including a massive 70 percent of millennials in India.

The development of social media is part of a long-term trend away from “traditional” means of interaction. There is no question that personal e-mail has superseded letters written with pen on paper; who still corresponds by snail mail? It's also increasingly the case that for hundreds of millions of people—especially young people—mobile phones have usurped landlines as the main tool for telephone conversations. And mobile phones are being used for a lot more than making calls. According to data from CTIA, the wireless industry's association in the United States, voice data now accounts for less than half of traffic on mobile networks. People prefer text messaging and are increasingly using SoMe to keep up to date with each other and organize their daily activities.



Multiple Points of Access

What exactly constitutes *social media* varies by country, and through time, especially now that connectivity increasingly involves mobile devices rather than desktop and laptop computers.

MySpace was one of the front-runners of SoMe until the upstart Facebook (FB) overtook it in 2008. Since then, FB has grown to be the global giant of social media, with more than half a billion users globally, but it by no means has the social media space to itself. The micro-blogging platform Twitter shot to prominence in late 2008, and by early 2010 it had more than 100 million registered users and was generating an average of 55 million tweets a day. What's particularly significant about the [Twitter statistics](#) is that 37 percent of its users use their mobile phone to tweet. According to digital marketing intelligence company [comScore](#), social networking is by far the fastest-growing mobile activity, with 20 percent of mobile users now accessing social networking sites via their phones.



SNAPSHOT: FACEBOOK

Requests		Ignore All
12 friend suggestions	399 friend requests	
5 event invitations	32 group invitations	
9 Page suggestions	1 friend sense invitation	
15 cause invitations	1 birthday wish invitation	
1 birthday cause invitation	1 petition invitation	
	1 world entrepreneursh invitation	
1 vampires invitation request	1 mafia wars request	
1 poker invitation	1 geni invitation	
1 my barack for... request	1 (lil) green patch request	

- **500 million+:** active users
- **700 billion+:** # of minutes/month people spend on site
- **90:** # of pieces of content the average user creates each month (30 billion pieces shared per month in total)
- **70:** % of users outside the U.S.
- **150 million+:** active users currently accessing FB through mobile devices (mobile users are twice as active on FB as nonmobile users)

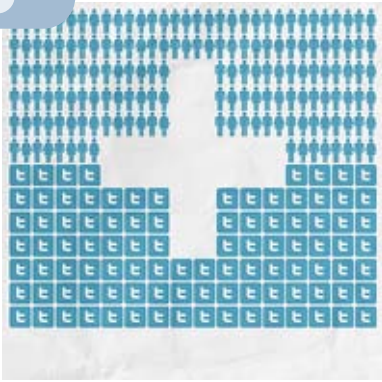
Source: Facebook.com

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Facebook is the number one site in Lebanon, ahead of Google, Live, and Yahoo. Because it is cheap and efficient, many marketers are using it. Fan pages and groups and games are very popular. The Lebanese pressure groups use it to shape and affect political, environmental, and social issues. This is something that will stay; it is not a phenomenon that will fade away. In the Third World, if the technology becomes cheaper, more people will have access to computers and will eventually use social media. That means more freedom of speech and the ability to express views and ideas. There will be important issues to resolve.” — **NADA METNI**, New Business Development, Euro RSCG Beirut



SNAPSHOT: TWITTER



- In June 2010, nearly 93 million Internet users visited Twitter.com, up 109 percent from the previous year; traffic is increasing from international markets, particularly in Asia and South America
- In the U.S., awareness of Twitter has exploded from 5 percent of Americans aged 12+ in 2008 to 87 percent in 2010 (by comparison, FB's awareness is 88 percent), but usage trails FB significantly (7 percent of Americans vs. 41 percent for FB)
- Nearly two-thirds of active Twitter users access social networking sites using a mobile phone
- 51 percent of active Twitter users follow companies, brands, or products on social networks
- After Japan's 3-1 victory over Denmark in the 2010 soccer World Cup, Twitter set a record with 3,282 tweets per second
- Most-followed person on Twitter: Lady Gaga (5.7 million+ followers)

Sources: comScore; "Twitter Usage in America: 2010," Edison Research/Arbitron Internet and Multimedia Series; mashable.com

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Social media needs about five more years to become truly mainstream. By the time today's social media hard-core users gain real monetary power, this platform will, to a great extent, have replaced other mainstream media and become the new media king.”

—PAVLOS TOOULAKOS, Client Service Director, Thompson Communications, Cyprus



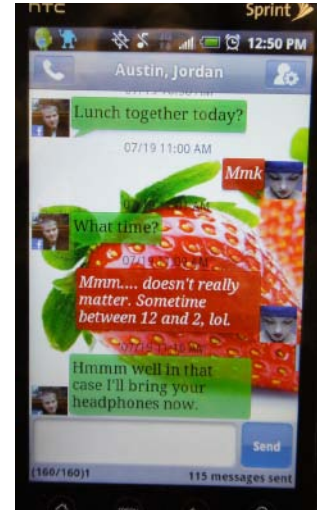
Now Twitter, too, is being eclipsed in the headlines. Newer social media services based on geolocation allow users to register their physical location digitally, in cyberspace, and connect up physically, in “meatspace.” The numbers of people using such services are still relatively small, but several fast-growing businesses are vying for the position of hottest geolocation service. Google Latitude claims some 3 million active users keen to “See where your friends are right now” and “Contact your friends”; Foursquare brings an element of game play and competition, promising to give “you & your friends new ways of exploring your city. Earn points & unlock badges for discovering new things.” Gowalla (“Discover, capture and share places and events with your friends”) is a service through which users check in at physical locations in their vicinity and receive items as rewards (icons that can be kept in a vault or left at specific locations).

The location-based services are still small players, but their rapid growth is attracting a lot of attention, suggesting they may be the next step in SoMe. Their popularity stems from their having been designed to bridge the gap between the virtual online world and the face-to-face offline world. They offer yet another way of staying connected with members of one's circle 24/7.

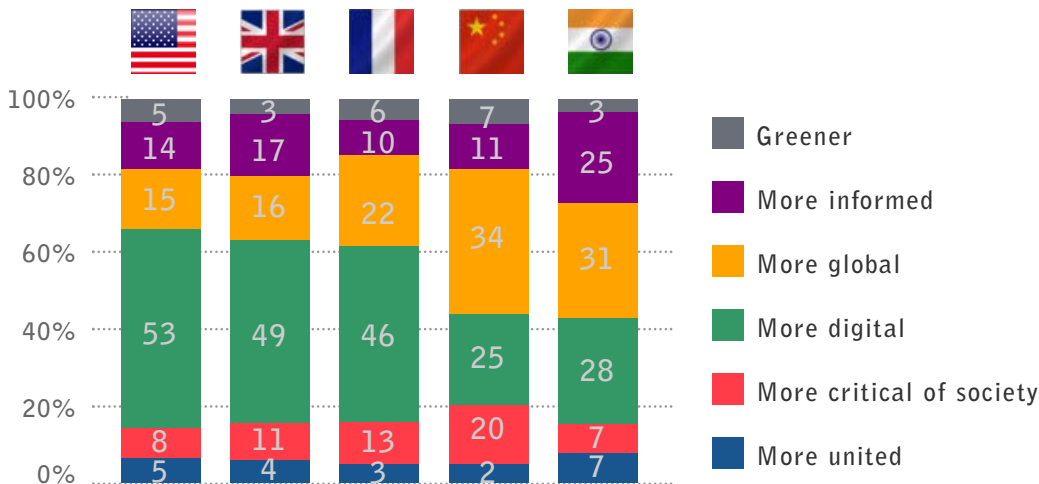


Millennials Self-Identify as the iGeneration

Millennials *are* the digital generation. When we asked them to identify “What is the biggest difference between your generation and previous ones?” only 15 percent of millennials chose “My generation is more informed” and just 5 percent chose “My generation is greener.” In contrast, 40 percent selected “My generation is more digital,” making that their key differentiator. The proportions were even higher in the United States (53 percent), United Kingdom (49 percent), and France (46 percent). The numbers were lower in China and India (25 percent and 28 percent, respectively) because more millennials in these emerging nations identified with “My generation is more global” (34 percent in China, 31 percent in India).



“THE BIGGEST DIFFERENCE BETWEEN MY GENERATION AND PREVIOUS ONES IS THAT WE ARE...”
(Millennials)



A Dutch research study has found that marketers are more familiar with social media this year than last, but are less thrilled about it as a medium. And that’s great. Because social media can only become really valuable and useful when it becomes ‘normal.’” –

ERIC YTSMA, Strategy Director, Euro RSCG 4D–Amsterdam



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Social media is 50 percent social interaction, 50 percent vanity (‘look where I’ve been, what I bought,’ ‘read my smart observations,’ ‘admire my style’). Social media platforms are really just a huge catwalk where everyone has a chance to feel important. Marketers need to understand this and figure out how not to intrude on the private conversations but have a presence in the part of social media that is about self-expression.” —GEORG

FELDMANN, Chief Strategy Officer, Euro RSCG Vienna

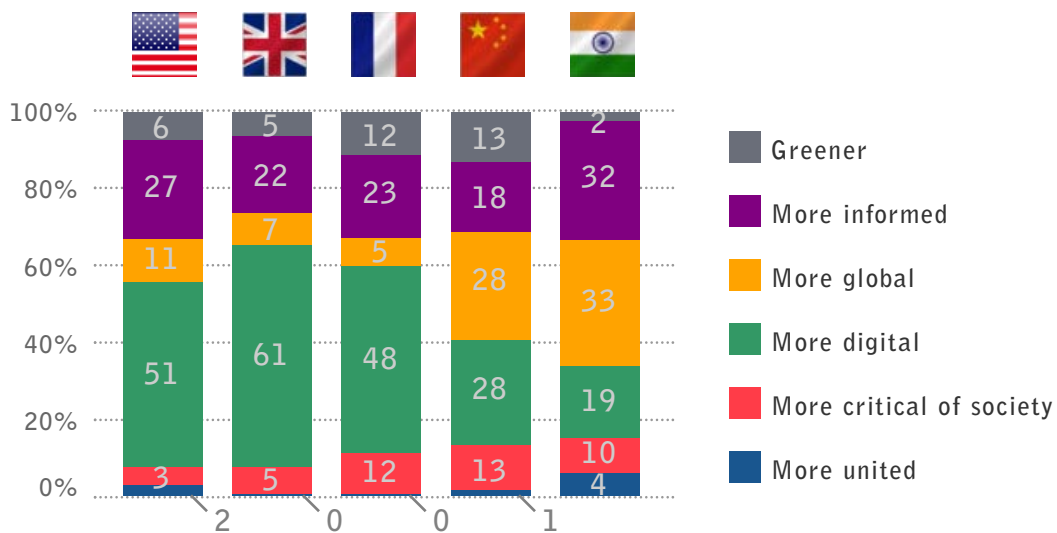


This view of the millennial generation was echoed by the older sample. Overall, 41 percent of respondents aged 40 to 55 cited “more digital” as the biggest difference between today’s youth and their own generation. Agreement was highest in the United Kingdom, at 61 percent. Once again, the Indian and Chinese samples considered globalization the more important differentiator, cited by 33 percent and 28 percent, respectively.



“THE BIGGEST DIFFERENCE BETWEEN TODAY’S YOUNG GENERATION AND MY GENERATION IS THAT THE YOUNGER GENERATION IS...”

(Age 40–55)



Social Media for a Change



Up until the post–World War II era, teens and young adults were not considered a distinct demographic, nor did they have any power to speak of. Young men were conscripted into military service and/or were busy learning a job long before they were eligible to vote. Young people of both sexes were under the thumb of their elders, expected to adhere to social norms and dictates. Education beyond high school was the exception rather than the norm. Both men and women tended to marry and settle down in their late teens or early 20s.

It wasn't until rock 'n' roll upset the status quo in the 1950s that young people were identified as a unique demographic. By the 1960s, "youth consciousness" had emerged, with teens and college students flexing their political and economic muscles and joining forces to create their own agendas: In the United States, it was the anti-war movement; in the United States and United Kingdom, it was hippies and flower power; in France, it was the spirit of May '68; and in China, it was the Cultural Revolution.

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Social media is very important because it is a point at which to reach people and communicate something quickly. It is not so easy to use it to establish a real relationship between a person and a brand.” —GIOVANNI ACUÑA MARTINEZ, Planning Director, Euro RSCG Colombia

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Social media has changed (whether forever or until a backlash) the way people are motivated to try products, services, and behaviors. The broader social context—what other people from around the world think of something—has more influence than ever before. It is no longer about motivating the individual; you have to motivate the group, who then motivate the individual.” —KATE GILL, Managing Director, Strategic Planning, Euro RSCG

Tonic—New York



For a time after those fires burned themselves out, the 18–25s didn’t have anything much to rally around other than fads created by astute fashion, media, and marketing specialists. Increasing numbers have gone further and further into education with a view to getting a good career and enjoying the fruits of the consumerist lifestyle. As in the prewar era, the 18–25 cohort became little more than a subset of society at large, just with fewer responsibilities and fewer wrinkles. Their age cohort did not have a distinctive agenda, nor did they have the desire or the means to develop one.

Now the development of social media is coinciding with the emergence of issues that are of particular interest to young people. They are the ones who will have to live with the environmental problems and climate change that feature so alarmingly in the media. They are the ones who are on the wrong side of the demographic bulge, with the prospect of having to support growing numbers of older people. They are the ones who will be saddled with the debts incurred by previous generations. In short, for the first time in decades, there are now several major societal shifts that are moving younger people to develop an awareness of themselves as a group set apart from older generations. This is part of what has driven the [One Young World](#) initiative, founded by top executives within Havas and Euro RSCG.

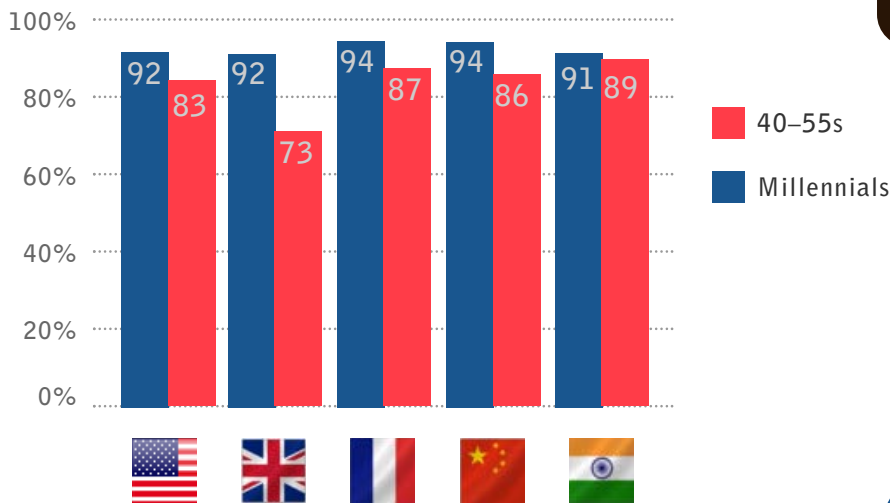


Social media has developed just at the time when the world has been looking hard at these big issues and waking up to their generational implications. For the first time in several decades, the younger generation has its own distinct interests beyond fashion and pop culture. After 30 years of shopping and couch potato-ing, there’s talk of change in the air—and it’s a mainstream topic.

In our survey, we asked both generations to rate their agreement with the statement “I believe the world needs to be changed.” An almost unanimous 92 percent of millennials agreed, with little variation between countries. A significantly smaller proportion of 40–55s feel the need for global change, with agreement particularly low in the U.K. (73 percent).



“I BELIEVE THE WORLD NEEDS TO BE CHANGED”
(% Agree)



Social media will be truly mainstream when smart phones and their monthly Internet-access fees are affordable to everybody. When everybody has the Internet in the palm of their hands and can use it wherever they go, social media and geolocation will really make sense. Even phone calls or SMS will be unnecessary.” —MARIA JOSE LOPEZ, Market

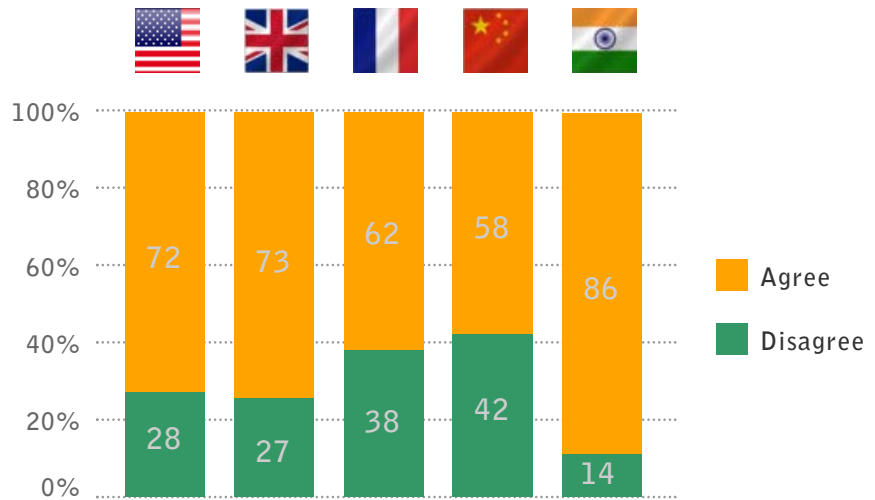
Intelligence Manager, Euro RSCG Spain



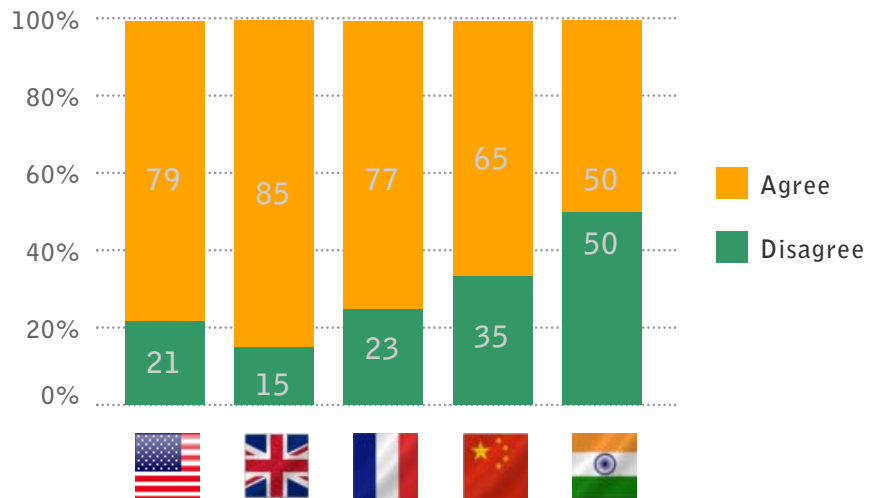
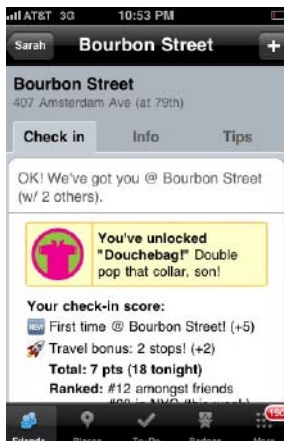
In the minds of many, social media will be a key factor in making whatever change is to be. Seven in 10 millennials agreed that “Social media is a force for change”—a view that is particularly strong in India (86 percent) but is also prevalent in the U.S. and the U.K. As a means of comparison, an almost equal number of millennials agreed that “Social media is about entertainment,” suggesting this generation is perfectly comfortable with SoMe having quite disparate purposes in their lives, both playful and serious. In India, social media is perceived far more as a catalyst for change than as a source of entertainment.



“SOCIAL MEDIA IS A FORCE FOR CHANGE”
(Millennials)



“SOCIAL MEDIA IS ABOUT ENTERTAINMENT”
(Millennials)



Social Media Is a Source of Power

Clearly, millennials believe the world needs changing, but whose responsibility is it? In his 1994 book, *All the Trouble in the World*, right-wing American humorist P.J. O'Rourke famously put down youthful hand-wringing with the observation: "Everybody wants to save the earth; nobody wants to help Mom with the dishes." However, today's millennials have more of a sense of responsibility than that. Responding to the statement "My generation has a duty to change the world," a substantial 84 percent of millennials agreed, with a high of 90 percent in China. In contrast, less than two-thirds of the older sample (63 percent) were willing to place that burden on youth; only in India was there some level of agreement between the generations on this point.



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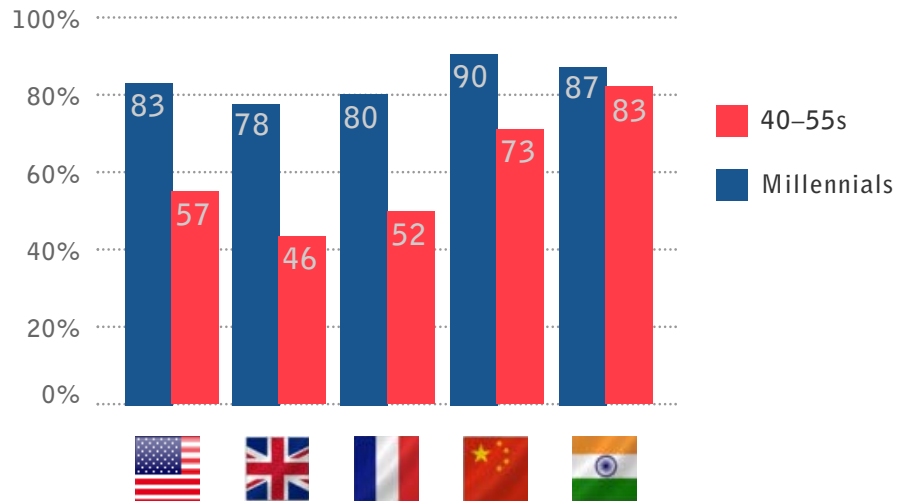
Numbers from around the world suggest that social media is invading every generation. Yes, it was meant for the younger generation, but the gradual increase in the need for networking and personalization has seeded the formula into the minds of anyone with access to the Internet. Burgeoning consumer opinions have also helped push many companies to adopt social media marketing strategies because user-generated content has a greater impact than traditional advertising.” —SHOURYA RAY CHAUDHURI, Senior Executive,

Brand Identity and Corporate Communication, Euro RSCG 4D Matrix, Bangalore



“MY GENERATION HAS/TODAY’S YOUTH HAVE A DUTY TO CHANGE THE WORLD”

(% Agree)

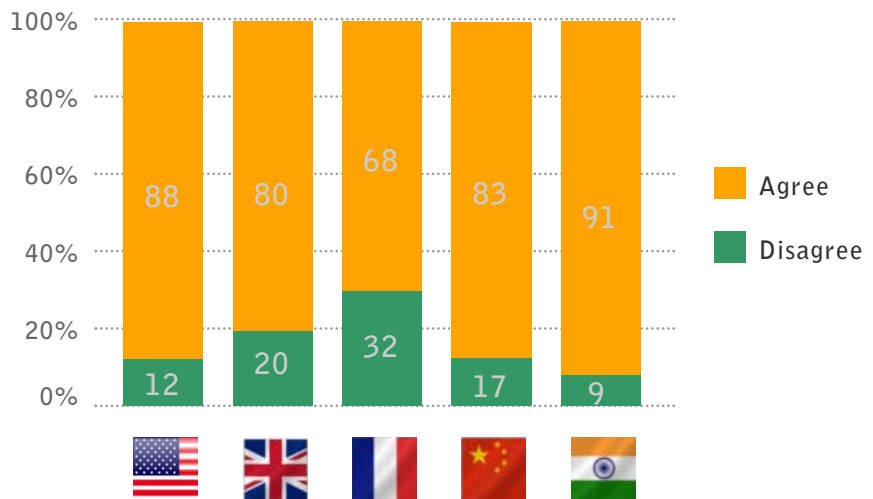


So, millennials believe the world needs changing and that it’s their duty to accomplish that change. But do they have what it takes? They certainly think so, including 91 percent in India and 88 percent in the U.S. Only French millennials appear less bullish about their generation’s capacity for change, but even in that famously pessimistic market more than two-thirds answered in the affirmative.



“MY GENERATION HAS THE POWER TO CHANGE THE WORLD”

(Millennials)





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IRAN ELECTION 2009: A SOCIAL MEDIA REVOLUTION

After the controversial victory of Mahmoud Ahmadinejad in the 2009 Iranian presidential election, the people of Iran took to the streets in what has become known as the Green Revolution. It could just as well have been called the Twitter Rebellion. As protests within Iran grew louder, the authorities there struggled to block news from reaching the outside world. British newspaper *The Telegraph* [reported](#): “Iran’s regime was doing its utmost to choke off the flow of news from its capital.” Foreign journalists were expelled, satellite transmissions were jammed, websites were blocked, and newspapers were censored. Yet the people had a power of their own: the ability to use their mobile phones to video-record scenes of the protest and governmental retaliation and transmit the images to the world over the Internet. All good, except the government was doing all it could to block servers and Internet access.

Enter Austin Heap, a 25-year-old sitting at home on a Saturday night in San Francisco. He began receiving tweets about the protests and the U.S. mainstream media’s failure to adequately cover the event. Then came news that the Iranian government was successfully blocking relays, effectively cutting off much of the outgoing Twitter traffic. In his [words](#), Heap “found a way around the restrictions, creating proxy servers and hiding encrypted data inside official Iranian government Internet traffic.” Then came an assist from the U.S. State Department, which asked Twitter to delay a planned daylong maintenance shutdown in order that the protesters not be silenced. Eventually, supporters in more than a hundred cities around the world took to the streets in a show of support for the Iranian people. The genie was out of the bottle and could not be shoved back in.

A year later, a documentary about the events of June 2009 aired on America’s HBO network. Available in three languages (English, Farsi, and Arabic), the film, *For Neda*, was put into multiple formats in order to be viewable on virtually any device. [Says Heap](#): “There is even a version specially designed to be shared via Bluetooth—from cell phone to cell phone—in Iran.”

A new generation. A new form of revolution, courtesy of social media.

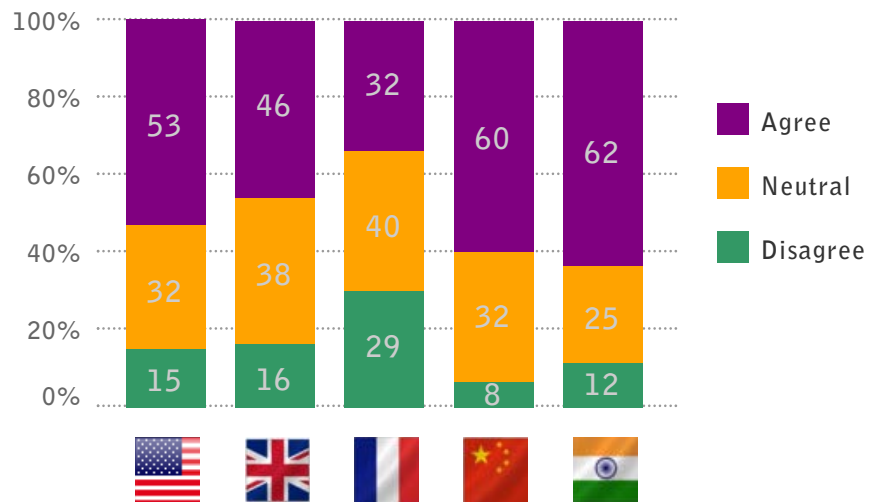


Whether they have more power than the previous generation to change the world is slightly less clear, with significant variation in responses across the markets. Across the entire sample of millennials, 50 percent agreed that “I have more power to change the world than my parents did at my age,” while only 16 percent disagreed. Agreement was strongest in the emerging markets of Asia (60 percent in China, 62 percent in India) and weakest in France (32 percent agreed, while 29 percent disagreed). All in all, the older generation expressed slightly more confidence in the power of today’s youth, with 63 percent saying youth hold more power than their own generation does to change the world and just 16 percent disagreeing. Once again, agreement is highest in the emerging markets (84 percent in India, 75 percent in China) and lowest in France (36 percent agreed, 32 percent disagreed).



“I HAVE MORE POWER TO CHANGE THE WORLD THAN MY PARENTS DID AT MY AGE”

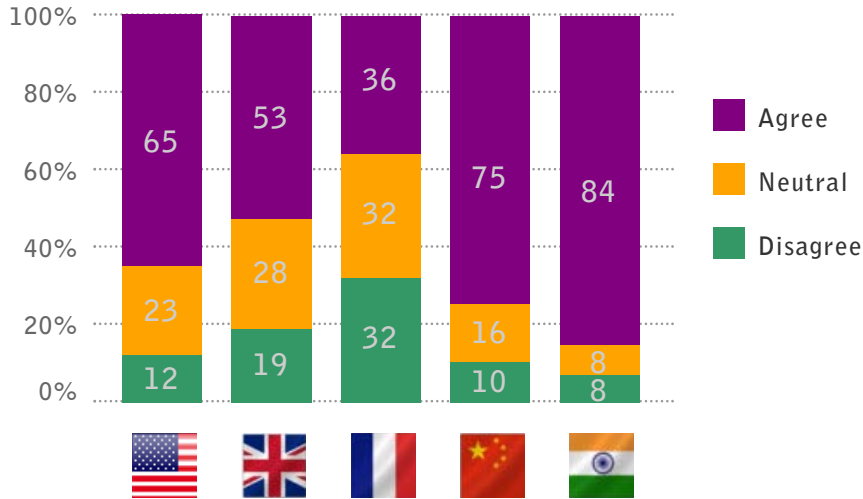
(Millennials)



There are more layers and variety to our social connectedness than in the past, thanks to social media. We still see our closest friends in the flesh on a regular basis, but the wiring of social media has enabled connections with people and businesses that either a) wouldn’t have happened in the first place or b) would have fallen by the wayside.” —BEN PHILLIPS, Senior Planner, Euro RSCG Sydney



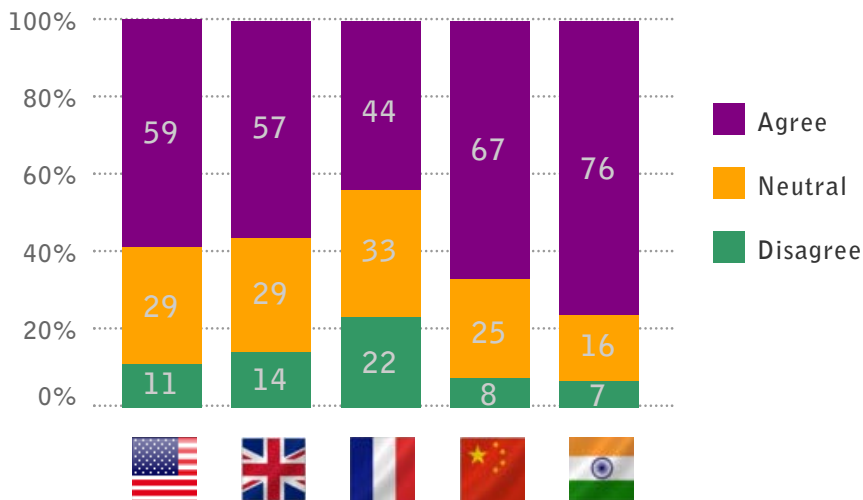
“TODAY’S YOUTH HAS MORE POWER THAN MY GENERATION DOES TO CHANGE THE WORLD”
(40–55s)



What form will this power take? According to a majority of youth in every market but France, “Social media is the new power of youth.” Agreement fell along now-predictable lines, with the strongest support in India and China and the lowest in France. Looking at the sample as a whole, six in 10 millennials believe social media is a source of power for their generation.



“SOCIAL MEDIA IS THE NEW POWER OF YOUTH”
(Millennials)





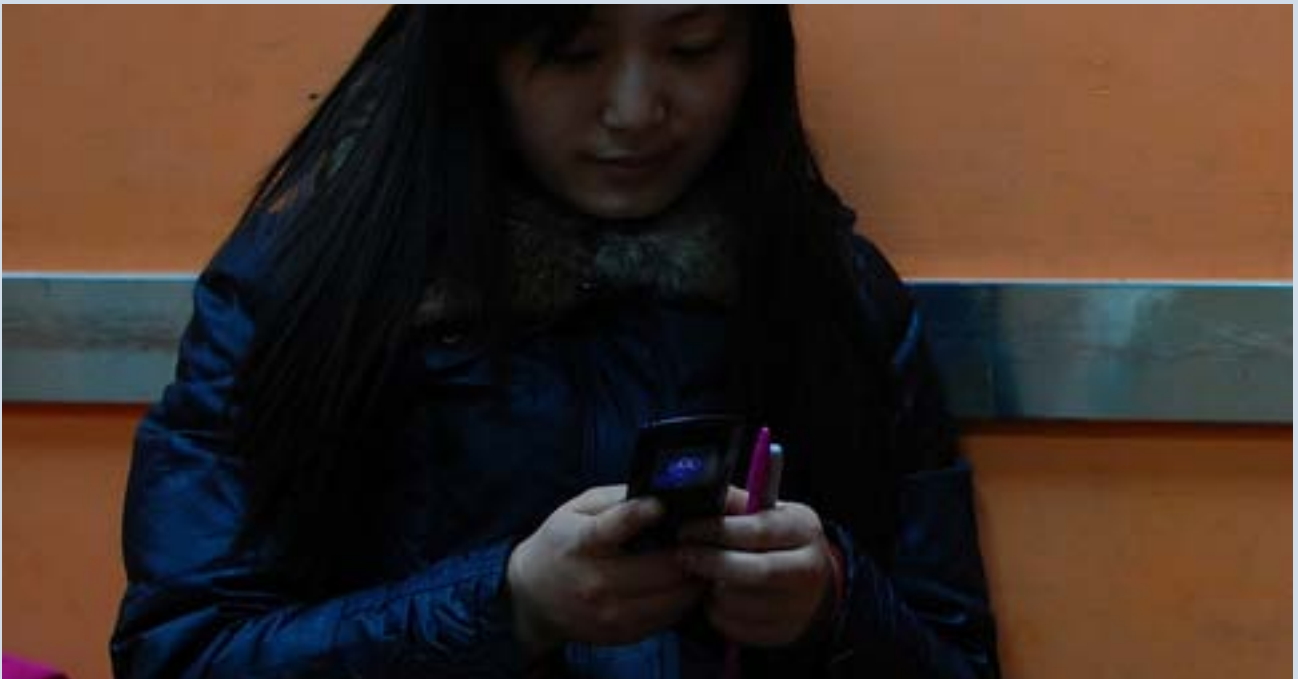
SPOTLIGHT ON CHINA: FIVE WAYS IT STANDS OUT IN THE GLOBAL LANDSCAPE

- China's social media ecosystem is a world unto itself: Whereas Facebook has 500 million users globally, Chinese Facebook clones have 360 million active accounts in a single country. All told, it is estimated that China is home to some 1.1 billion active social networking accounts.



- Games play a hugely important role in Chinese social networking. RenRen and Xaixin001 are among the top gaming sites; the latter is responsible for addicting hordes of white-collar workers on Internet games.
- Chinese social networks historically have been much better than their Western counterparts at monetizing their services. Digital goods are a big reason for this: In 2009, one company alone, Tencent, sold nearly \$1 billion in digital goods, including such things as virtual pets and virtual clothing and accessories for online avatars.
- Bulletin boards (BBS) continue to play a huge role in the Chinese Internet and are a popular source of product research. According to 2009 research from China Internet Watch, nearly a quarter of Chinese (23.5 percent) spend six hours or more on BBS each day, offering an important channel for marketers.
- Assuming linear growth, there will be an estimated 593 million mobile Internet subscribers in China by 2013. In a country in which notebook computers are outside the reach of many consumers, brands need to consider how to give users a compelling mobile experience, including on branded social networking sites.

Source: Andrew Knott, Chief Digital Officer, Euro RSCG Asia Pacific

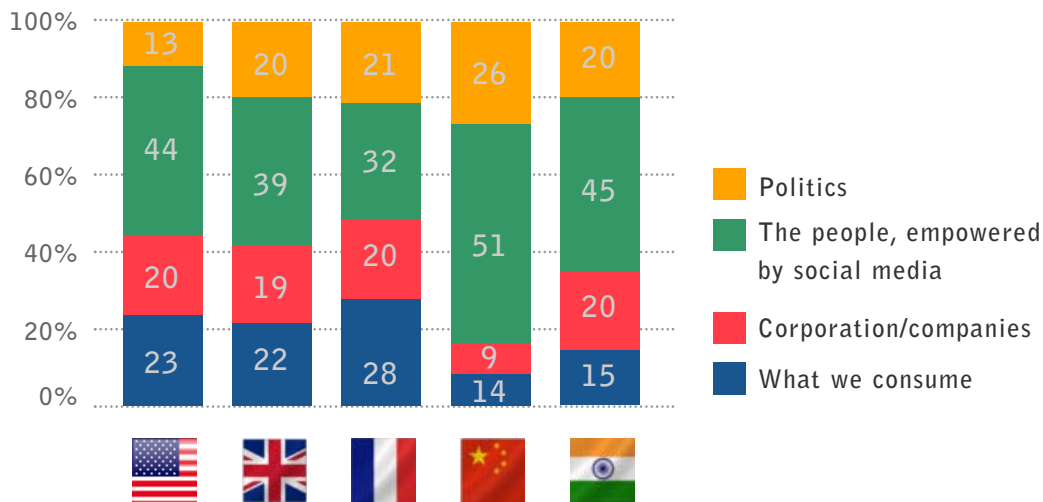


Social Media Beats Politics by a Landslide

Several major political figures have won elections on a platform of change in recent years, notably President Nicolas Sarkozy of France in 2007, President Barack Obama in the U.S. in 2008, and Prime Minister David Cameron in the 2010 U.K. general election. However, only a fifth of millennials in our survey think **“politics”** will be the greatest agent of change in years to come. Faith in politics as an agent of change is highest in China (26 percent) and lowest in the U.S. (13 percent).



“WHAT DO YOU BELIEVE WILL BE THE GREATEST AGENT OF CHANGE?”
(Millennials)





Consumer power has also been widely touted as an agent of change, as consumers have become more conscious of the environmental and social impact of what they buy. In fact, Euro RSCG has looked in depth at this shift in consumer thinking in the book [Consumed: Rethinking Business in the Era of Mindful Spending](#) (Palgrave Macmillan, 2010). There has certainly been plenty of growth in socially conscious and eco-friendly products and branding, to the extent that conscientious young consumers have come to expect it. It is not surprising, therefore, that **“what we consume”** scored even more strongly than politics as a potential agent of change among our millennial respondents. Faith in the power of consumption to create change is strongest in France and lowest in the less-developed consumer markets of India and China.

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As with traditional media, social media is definitely a connector. While traditional media focuses on one-to-one and/or one-to-many, social media does this plus enables mass collaboration with a focus on connecting many-to-many. We are social creatures, and the social Web is powerful because it leverages our desire for connection and enables us to scale our behaviors and amplify our potential interactions.” —KANDACE HUDSPETH, Global

Strategy Manager, Euro RSCG 4D—New York



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Today social media is strongly linked to the medium itself, but what about tomorrow? Social media will be mainstream when it is no longer necessary to master the medium, which still excludes some types of people. Twitter and Foursquare are not available to everyone, but forums and opinions that reflect the social media quickly expand through to all.” —LUC BASIER, Strategic Planning Director, Euro RSCG C&O, Suresnes, France

There has also been a growing push for **“corporations/companies”** to use their power for the greater good—as was explored by Euro RSCG in [Good for Business: The Rise of the Conscious Corporation](#) (Palgrave Macmillan, 2009). Corporate social responsibility (CSR) has moved from the fringes to the heart of business, being championed by major global players such as Google, GE, and Walmart. It may well be a sign of progress for CSR that nearly one in five millennials overall rated corporations/companies as the greatest agents of change; even a decade ago, it is unlikely many people would have looked to the business world to lead the changes they want to see. In fact, the overall figure would be even higher were it not skewed by Chinese millennials, only 9 percent of whom see businesses as creators of positive change. In the other markets, more than twice as many respondents perceive businesses as a source of positive change.

As agents of change, these three factors (politics, consumption, and corporations) are totally eclipsed by a force particularly dear to today’s youth: social media. For a

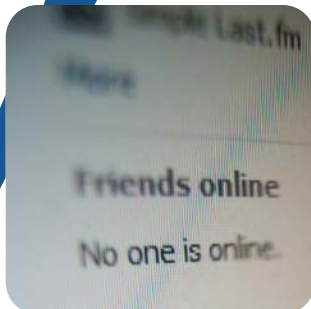


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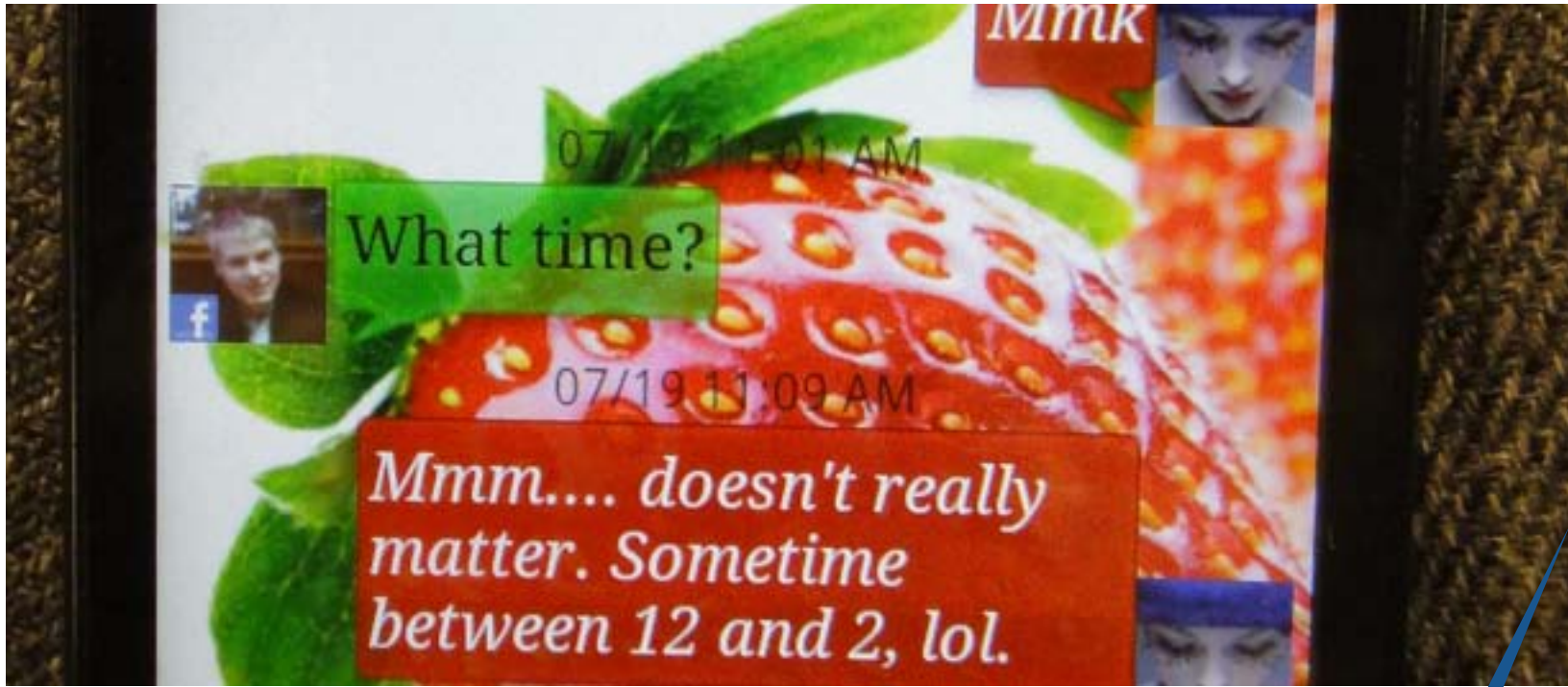
“Two weeks ago there was a protest against a thermoelectric company here in Chile. It started in a blog and was viralized through Twitter and Facebook. ‘Termoeléctrica’ was a Trending Topic in Twitter, which means it was one of the most tweeted about topics. There were online streamings right from the protest. It was beautiful!” —**DAVID OYARZÚN**, Head of Planning, Euro RSCG Santiago

significant plurality (42 percent) of millennials, the greatest potential agent of change is “**the people, empowered by social media.**” Chinese millennials have placed the most faith in SoMe (51 percent), followed by Indians (45 percent) and Americans (44 percent); the percentages were a still-high 39 percent in the U.K. and 32 percent in France.

Bear in mind that the survey forced respondents to make an either/or choice here in order to get clear differentiation among the four factors. In practice, these factors are intertwined. Politicians use social media to mobilize support and connect with voters, as shown in recent U.S. and U.K. elections; conversely, grassroots movements use social media to push their issues and opinions into the political arena. The same processes are increasingly at work within corporations as well. And the use of social media to influence consumption choices and encourage more conscientious spending can be found across the Internet. In a very short time, SoMe has worked its way into the social, political, and economic fabric of our lives.



CONCLUSION: FAR FROM A PASSING FAD



There's a growing body of evidence that millennials are the first generation since the baby boomers to be defined and shaped by a mass phenomenon: namely, social media.

Back in the 1950s and 1960s in the Western world, the postwar generation was shaped and defined by its own form of music and subsequently by a distinctive spirit of rebelliousness that rock 'n' roll inspired. In non-Western countries, other conditions prevailed; in particular, China went through the turbulence of the "great leap forward" and the Cultural Revolution, which caused an entire generation to miss out on education. India in the 1950s and 1960s was outside the world mainstream, dealing with its own political and social issues.

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The world has changed, or so say my kids. The world has changed, or so say my clients. The change has been caused by social media. It has, through the empowerment of each of us, delivered the promise of digital. We are connected. We have influence. We make things happen. The impact of social media is far-reaching, well beyond how we connect with our friends. It has changed how we work. It is changing how we make markets. It has, critically, re-leveled the playing field.” —**GEORGE GALLATE**, Global Chairman, Euro RSCG 4D

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The use of social media (especially amongst millennials and the younger generations) is definitely changing patterns of communication, mainly in the professional context. The main influence is that social media are instrumental when it comes to choosing a career and formulating expectations. This means that companies are looking for new ways to tap into communities where millennials are looking for jobs and speaking about them. The other important development is in B2B, where decision makers in a specific category use tailored social media platforms for networking and, to a lesser extent, exchange of information.” —PETER SCHAEFER, Planning Director, Euro RSCG Zürich

appeared on the cover of *AARP*, a magazine for people aged 50-plus. For millennials, in the few years that social media has been around, it has quickly become an integral part of their lifestyles. A teenager or 20-something who is not plugged in to SoMe is detached from a fundamental generational experience.

It must fulfill a special function in their lives. Music provided the soundtrack, the style, and the ideology for baby boomers. Social media enables millennials to multitask at will wherever they are; with social media they can interact, communicate, share, learn, inform, congregate, create, mobilize, and/or play, seamlessly. SoMe lubricates and energizes their lives at school, work, and home.

It must shape behavior and attitudes. Rock ‘n’ roll was the vehicle for an entire set of distinctive cultures that are still visible today among aging boomers. Social media is so pervasive that academics and researchers are seriously wondering whether it is “rewiring” the brains of users. Judging by the rapt attention of young people focused on their computer and mobile screens, there can be little question that it is visibly shaping behavior and creating a different view of the world and how one interacts with it.

They must identify with it. Rock ‘n’ roll shocked previous generations and, for that, was all the more embraced by rebellious baby boomers. Now, people of all generations recognize that millennials have a natural affinity for digital technology in general and social media in particular. Our study provides further confirmation that millennials identify strongly with SoMe; it is their thing and it is a very big thing that has been a mainstream media mainstay for several years now and shows no signs of waning.

Social media is no passing fad. It is shaping—and being shaped by—the newest generation of youth, and its implications will be profound.



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