



Society in motion

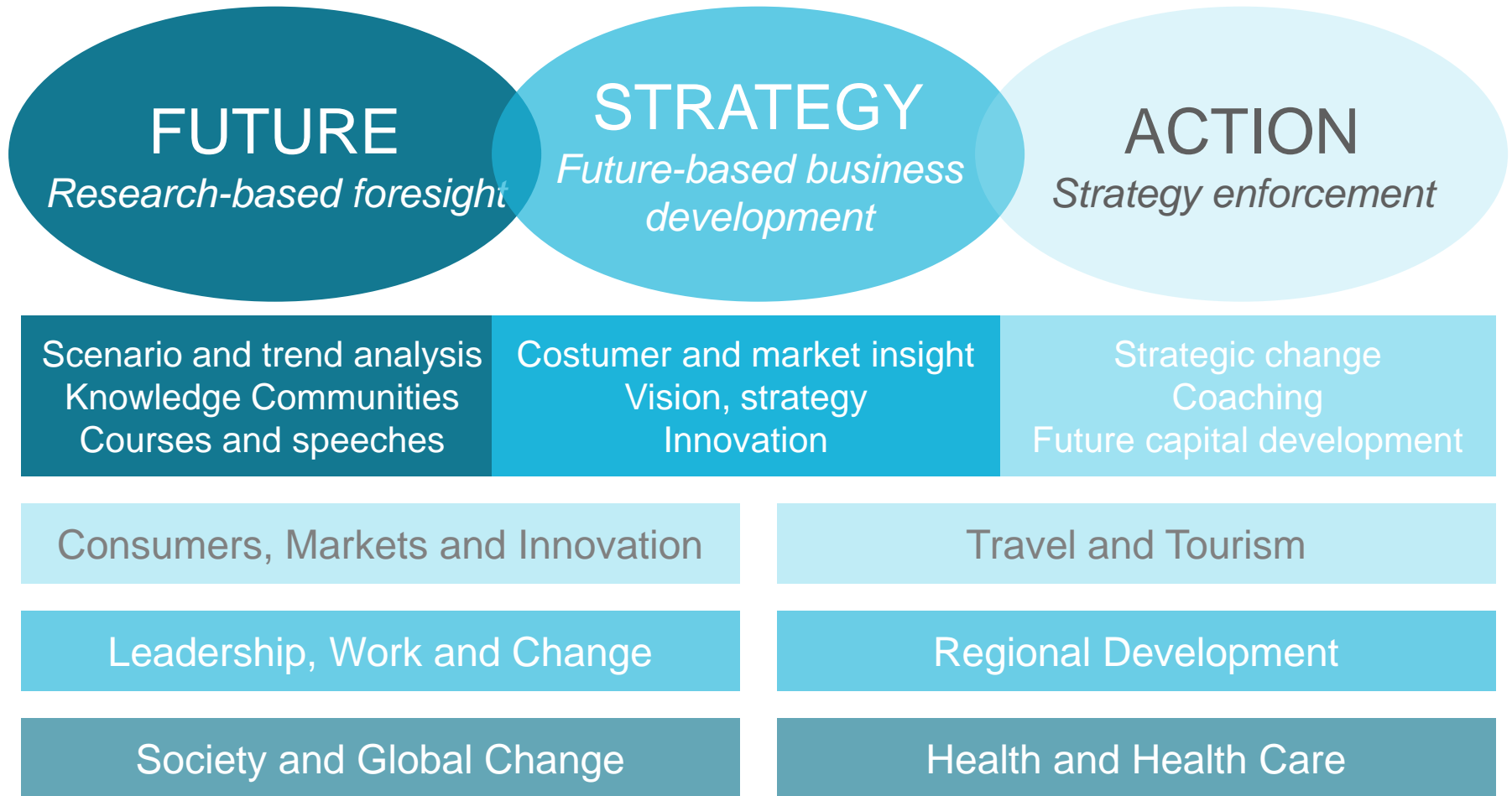
— Understanding the future audience

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“Making future an integral part of everyday’s business life”

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WHAT'S A TREND?

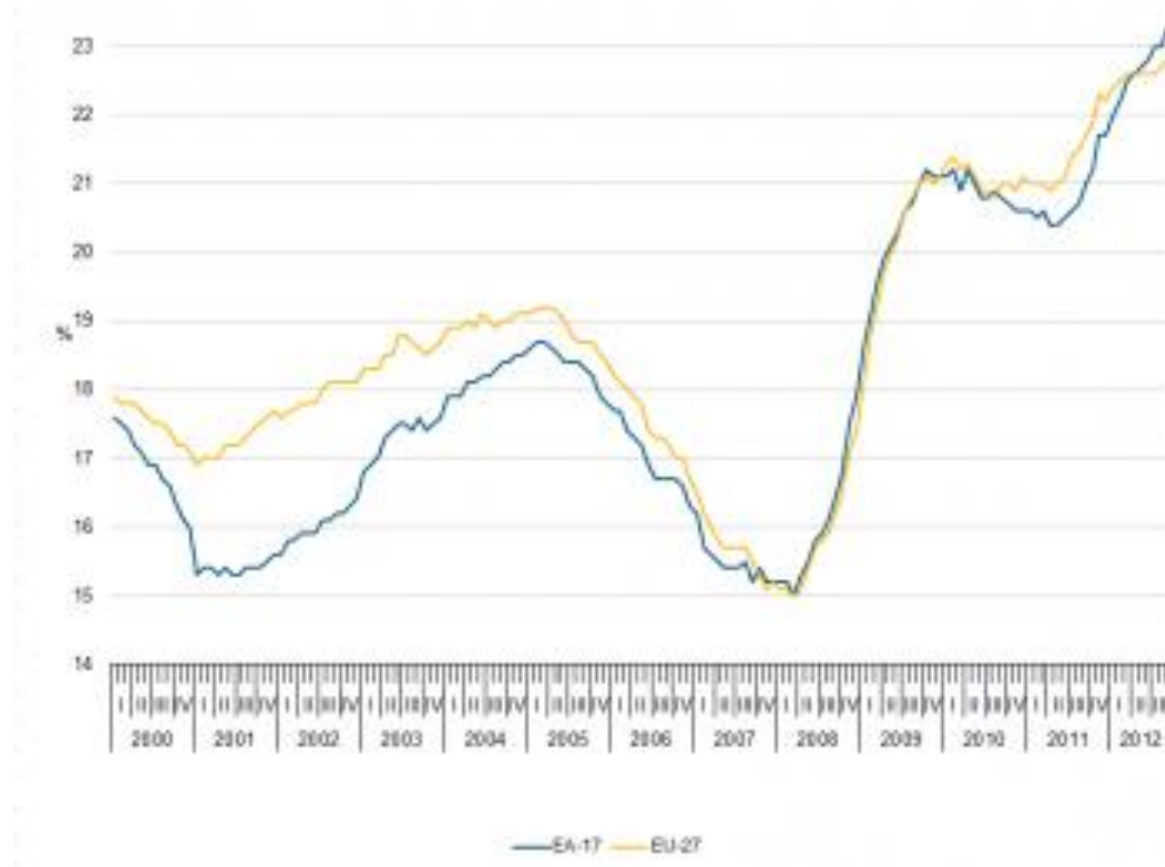


Welcome to the turbulent teens!



Flickr: Chaval Brazil

Youth unemployment in Europe



Downward mobility – now a reality

“After several decades of rising expectations the present day newcomers to adult life confront expectations failing – and much too steeply and abruptly. If there was a bright light in the end of the tunnels their predecessors passed through, there is now a long, dark tunnel stretching behind every one of the flickering, fast fading lights trying to in vain pierce through the gloom.”

Zygmunt Bauman, Guardian, 31 may 2012

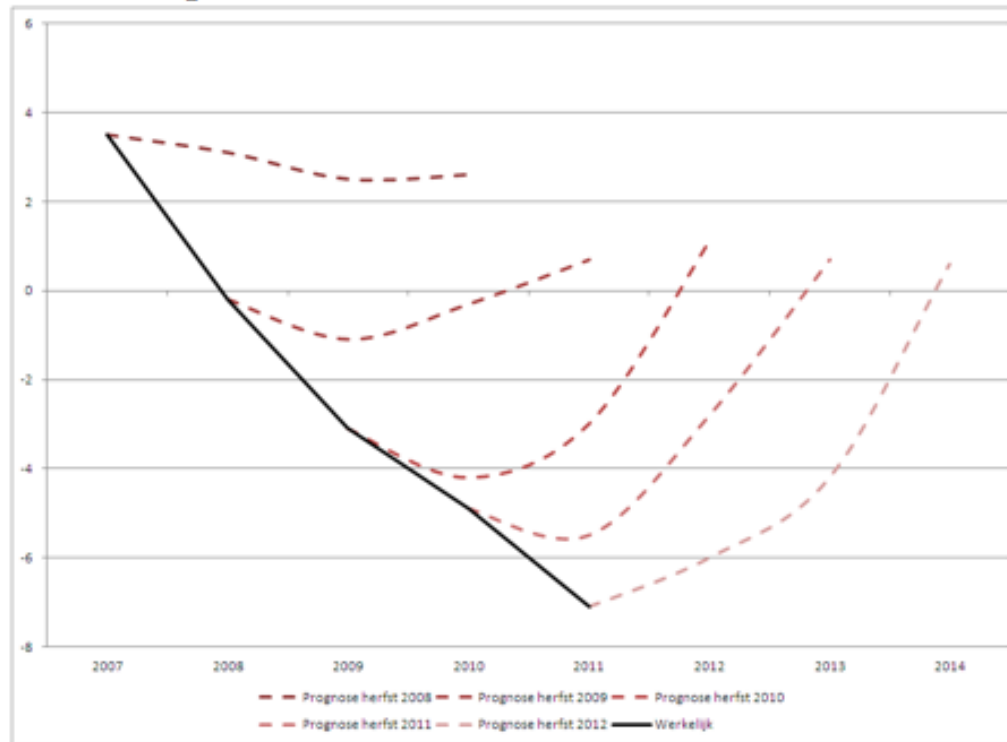
The power shift:

Russians & Chinese property investors gets citizenship



Who can you trust?

**Grafiek 2: Prognoses van Griekse groei per jaar en definitieve resultaat
(Bron: Europese Commissie)**

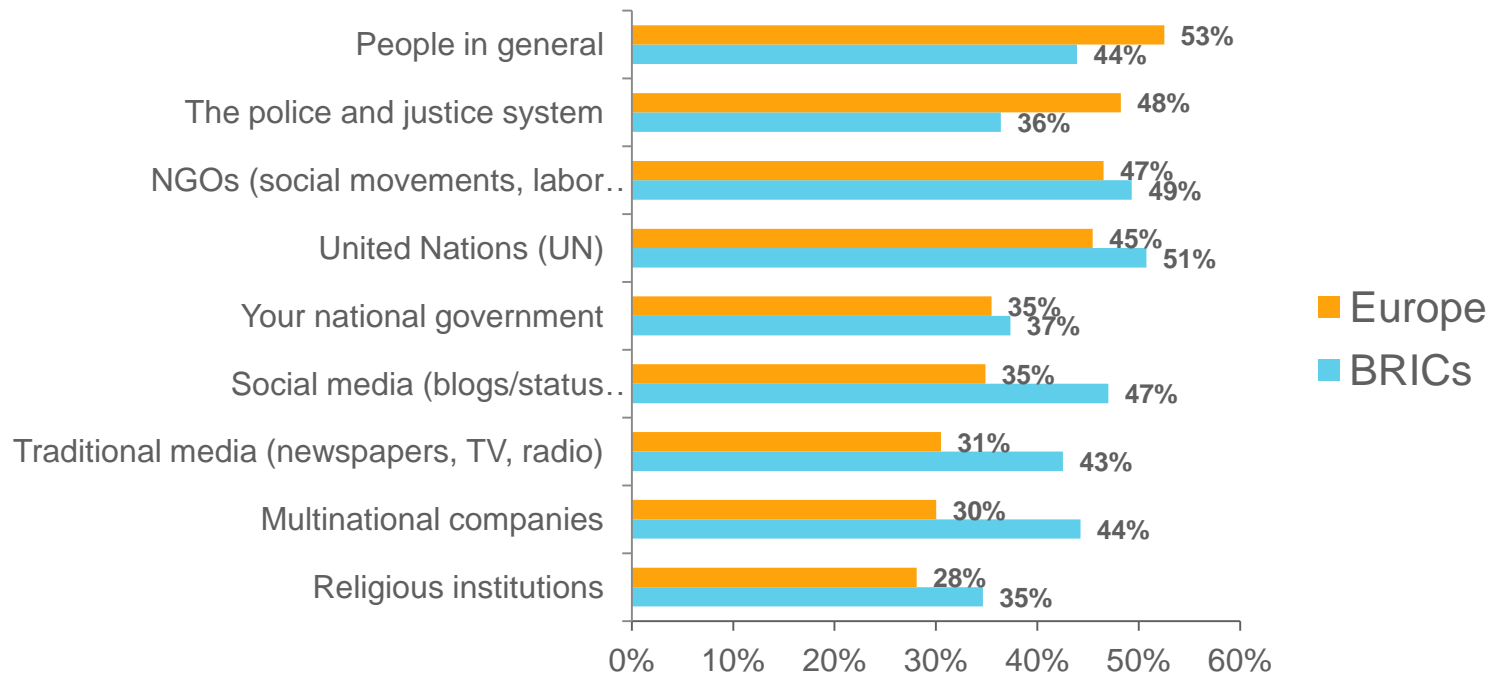


The break down of authorities



Who we trust!

To what extent do you trust the following groups and institutions?
(% 'trust')



Conclusions: Turbulent teens

- We'll tend to favor the local and turn inwards
- We seek the secure, familiar and everlasting
- Public Broadcasters may have a window of opportunity!



Conclusion:

**The brand of the sender needs to
be a trustmark!**

Generation NeoCon



From Yuppies & Dinkies...



...to Hesitants & Riskies

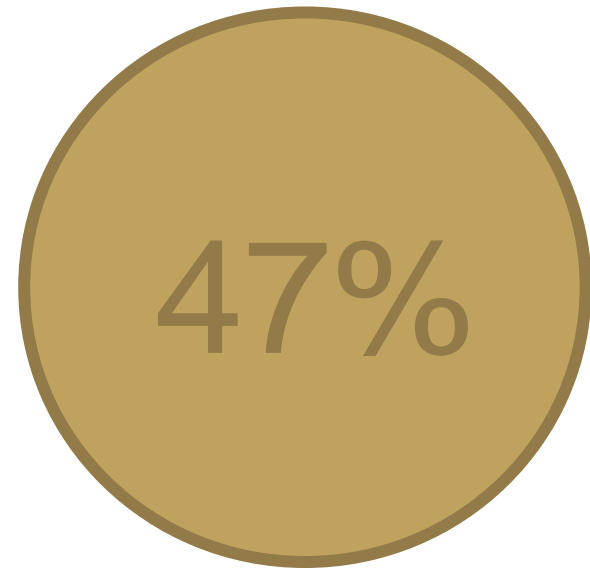


Globalization – threat or possibility

**Immigration is having
a positive effect**



**Globalization is having
a positive effect**

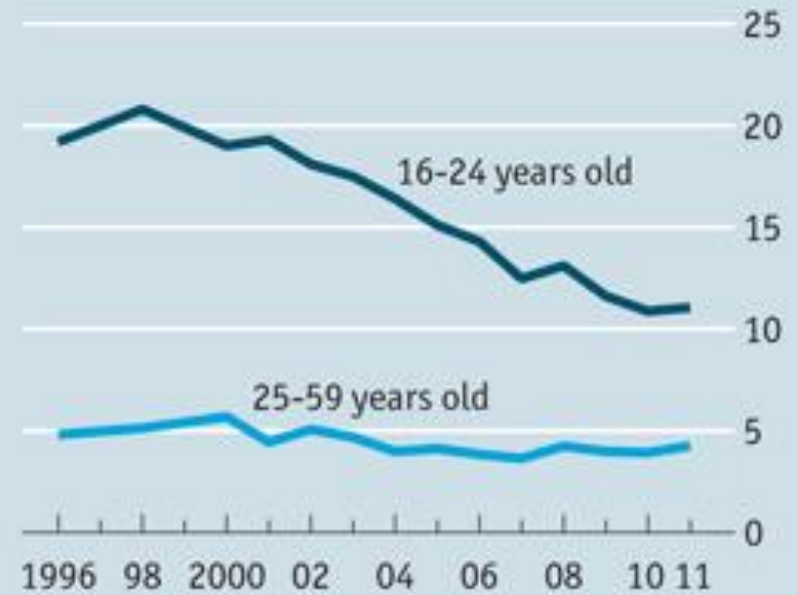


Generation NeoCon 2010



No more teenage kicks

Taking of any drugs in the past month, by age, %



Source: Crime Survey for England and Wales

Dreams...

Getting a good job 51%

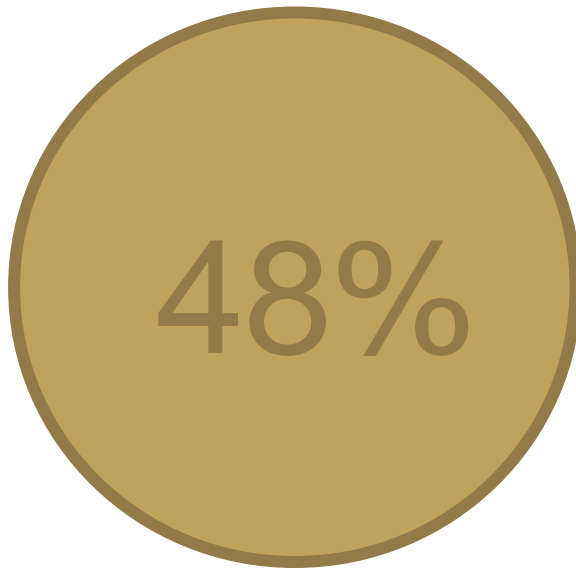
Having a nice home 42%

Having children 39%

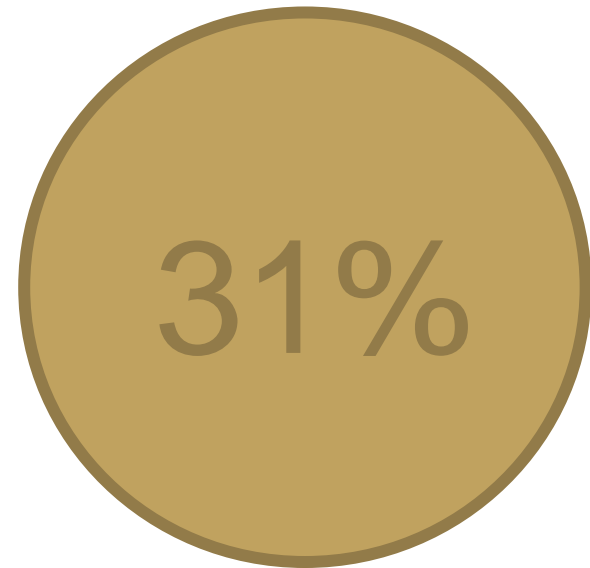
Finding the one 38%

What is respect?

Being a good parent



**Keeping a family
together for many years**



Greatest fear...

Not getting a job 42%

Environmental degradation 27%

Wars 26%

Poverty & famine 25%

Where they want to work...

2013 Teaching & Education!

Conclusion Generation NeoCon

- Young people are more than aware of the serious situation
- Media has become less attractive as a future dream job sector
- The young seem to appreciate stability & security more than before



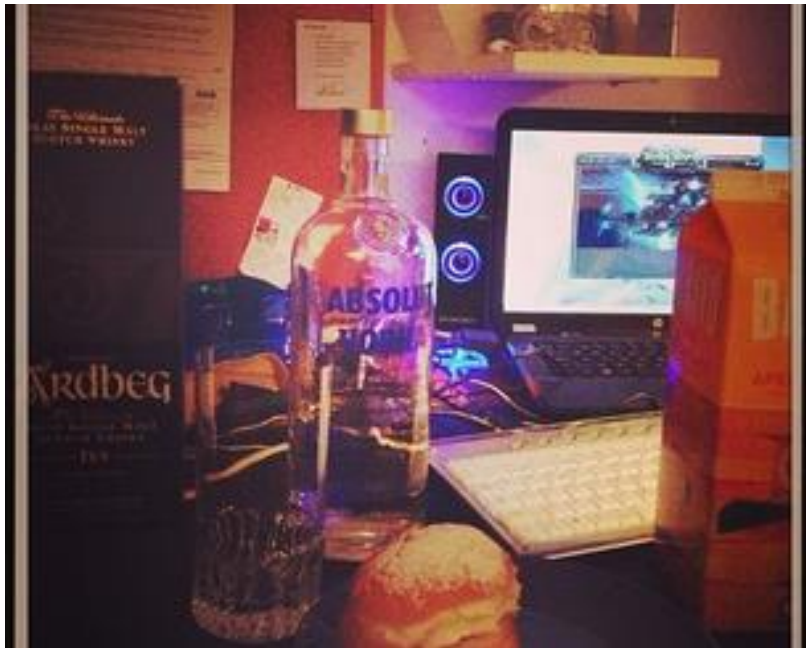
The concentrated viewer...



Is TV still a social media?

*”Hang out in front of the TV?
We never hang out
in front of the TV!”*

Hanging out....



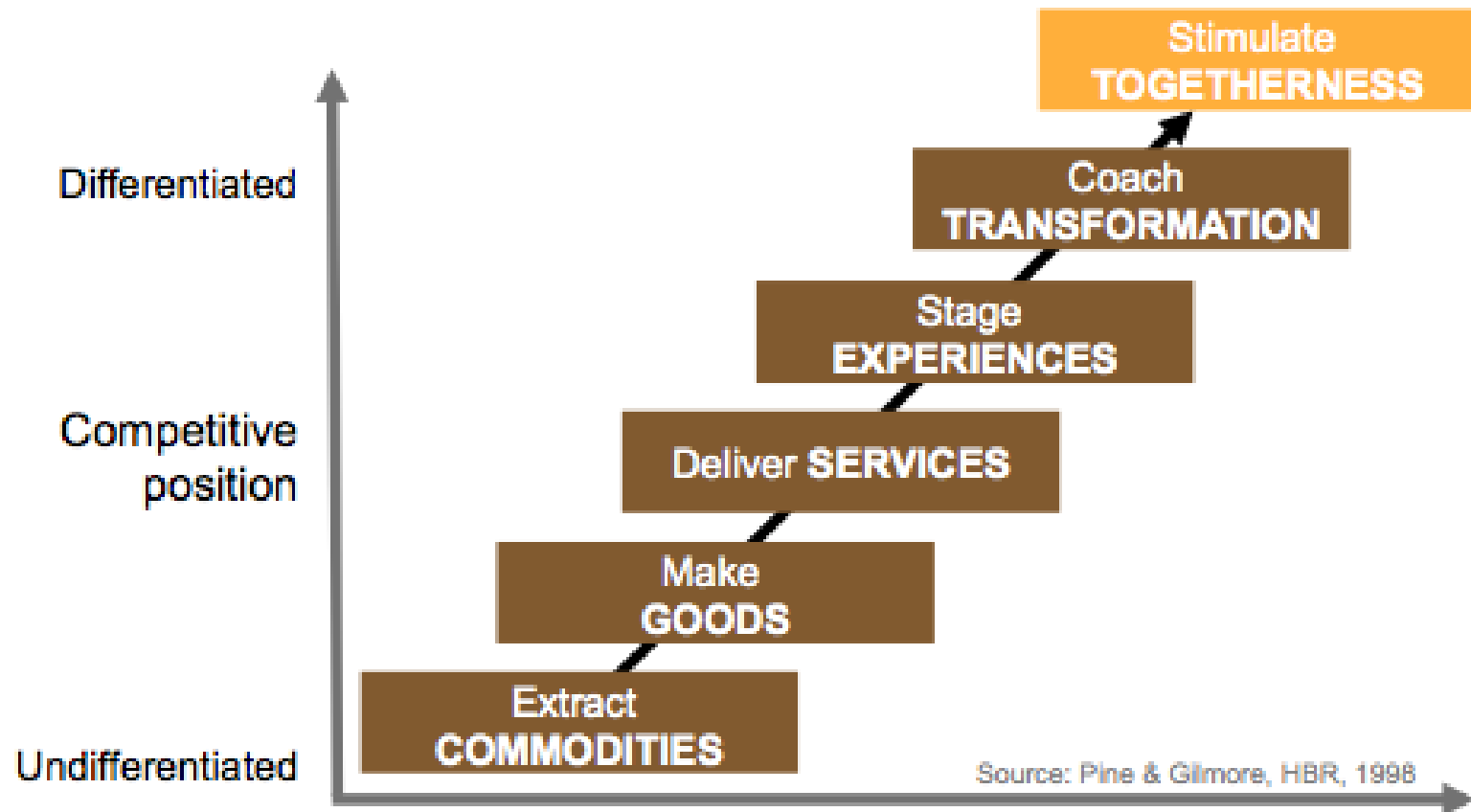
Hang out = Chilling in front o the TV



Social TV is...

*“An intimate, small scale,
closing off the
world experience”*

From me to we: TV solutions as a social glue



Marathon-viewing



Conclusions



TV is still the main hub for concentrated viewing!

- TV viewing in the sofa a re-energizer
- Still a scene for family & intimate togetherness
- It doesn't have to be broadcasted TV!
- It is not about channels, commercial or public service not about programmes or films as **what to watch!**



Conclusion:

Need for play solutions!



The distracted viewer



Single screen to multiscreen

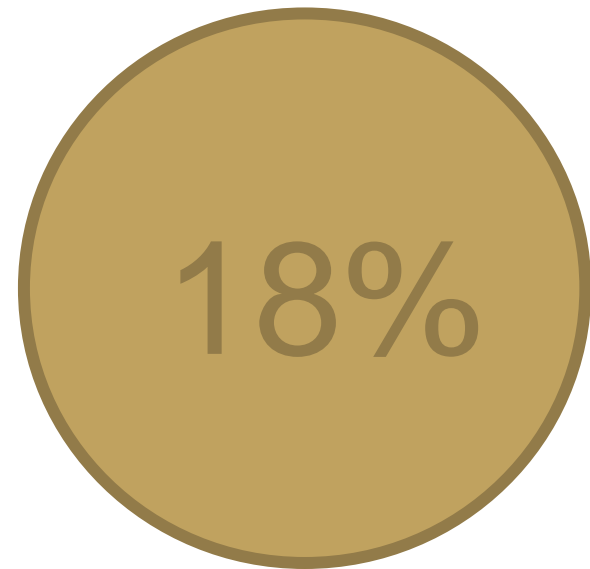


Increasingly multidistracted viewers

"Multiscreen is natrual"



"Willing to pay for seamless"



The remote social factor

Share of viewers commenting
on social media sites
while watching TV (Global)

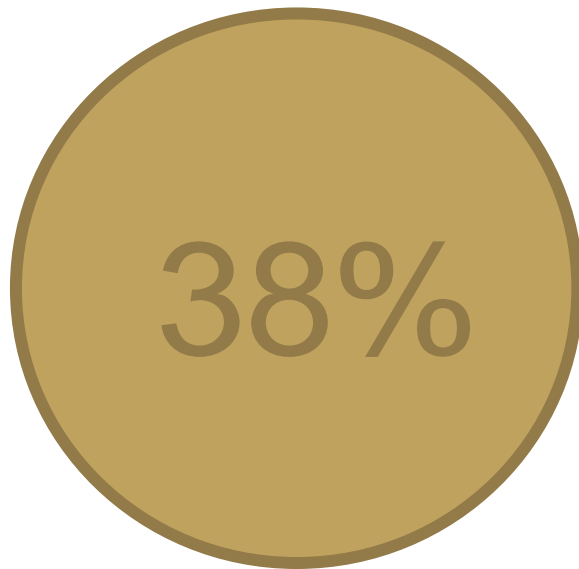
40%

TV discussion on
social media enhances
TV experience(Sweden)

25%

Multidistracted viewers

"Multiscreen is distracting"

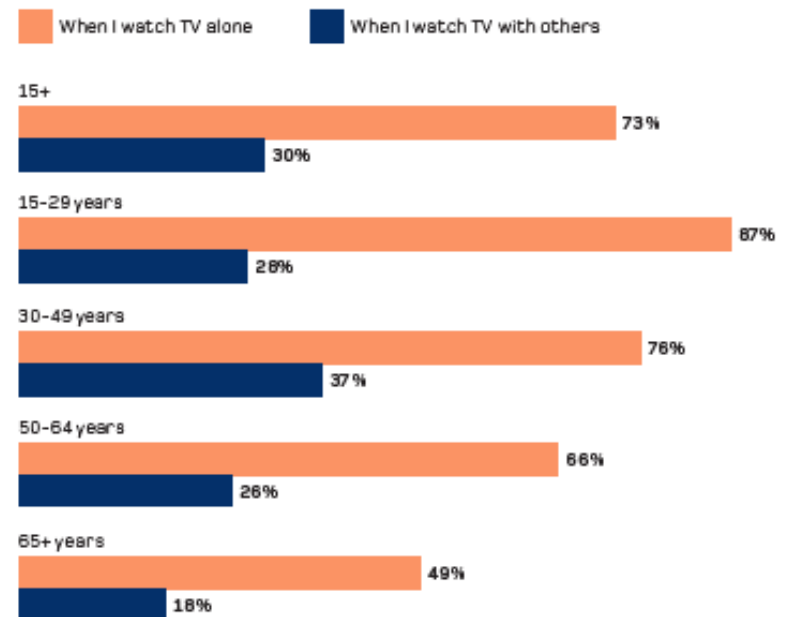


In what situations do you usually use the Internet while watching TV?

Percentage of panelists who use the Internet and watch TV simultaneously and who have answered frequently or often.

Age group: 15+ years

Source: OR Panel



Mobile viewing – fills the silence



Consumers are less patient

2009

2 sec

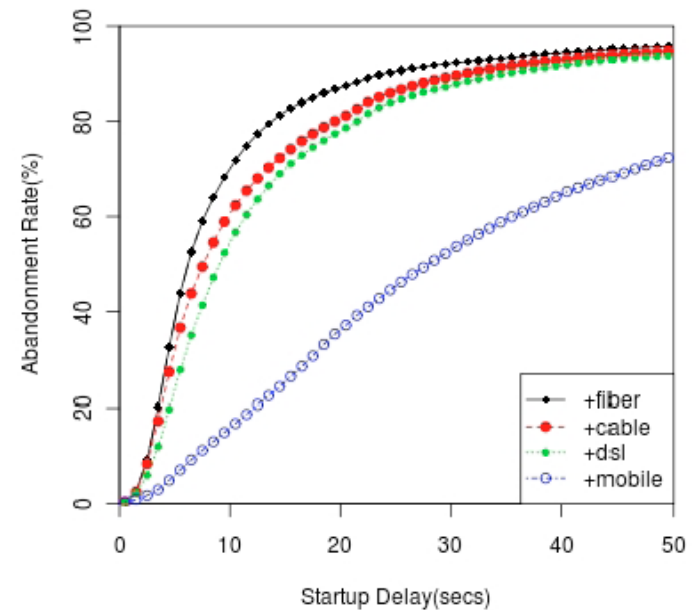


Figure 12: Viewers who are better connected abandon sooner.

Source: University of Massachusetts "Video Stream Quality Impacts Viewer Behavior: Inferring Causality using Quasi-Experimental Designs" (2012)

What features are important?

Quality 58-62%

Supersimple user interface 51%

Tailored content 51%

Era of economy of qualities!



Technological solutions not the only answer!

80% of clients wants brands to be more human!

The currency shift!



MULTIDIMENSIONAL PEOPLE



ROLE 1: LIFE MAXIMIZATION



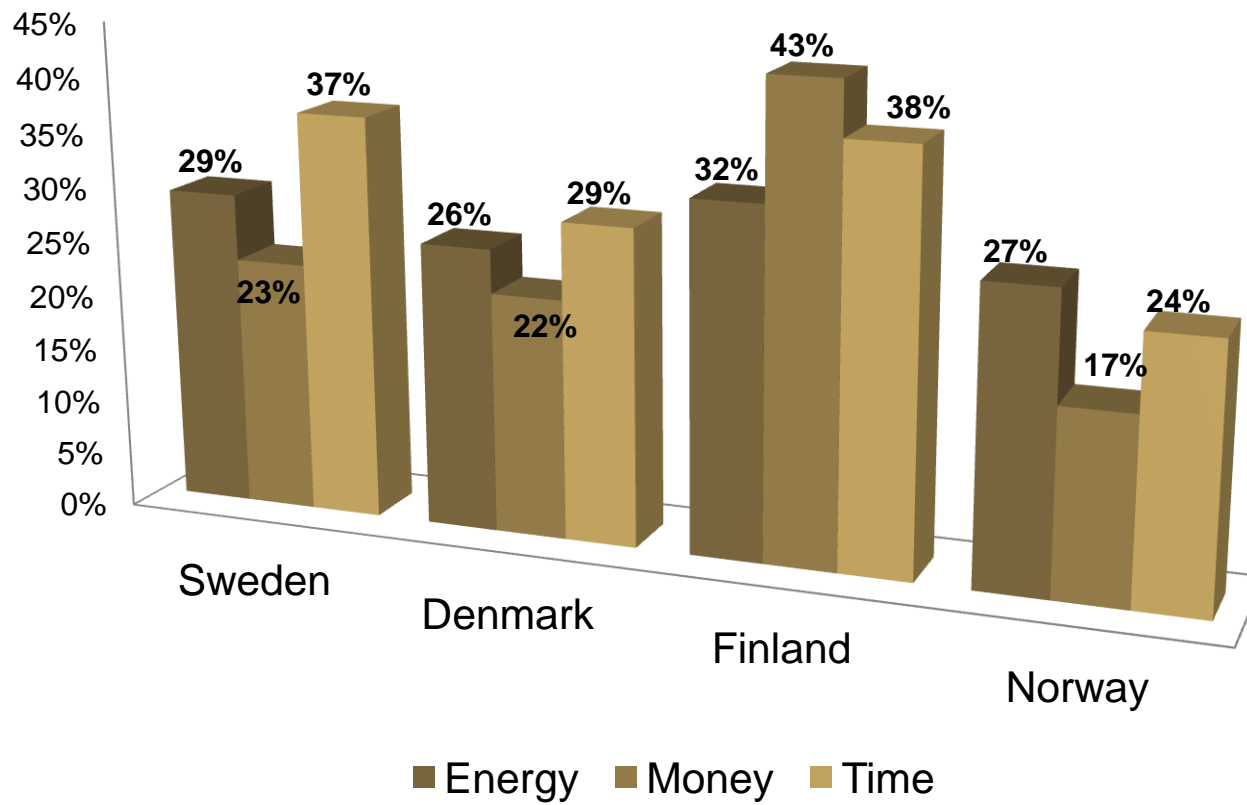
ROLE 2: HOMO EFFECTIVICUS - NO FRICTION LIVING



ELSEWHERE SOCIETY



Energy is the new consumer currency!



Lack of energy - The value of no choice



From limited supply to content explosion



Value for the viewer:

Please don't make me think!!!



Trustmarks chooses for you!



New actors



Being a trustmark is not just about credibility!

- Predictability
- Trust in providing what is demanded
- A warranty that the right choices are available



Conclusion:

Currency shift & the value of no choice

- Need to provide effortless solutions
- Don't make us think!
- Intuitive solutions
- Branding, branding & more branding



The future role of TV & Public Service



Who do we trust?

53%

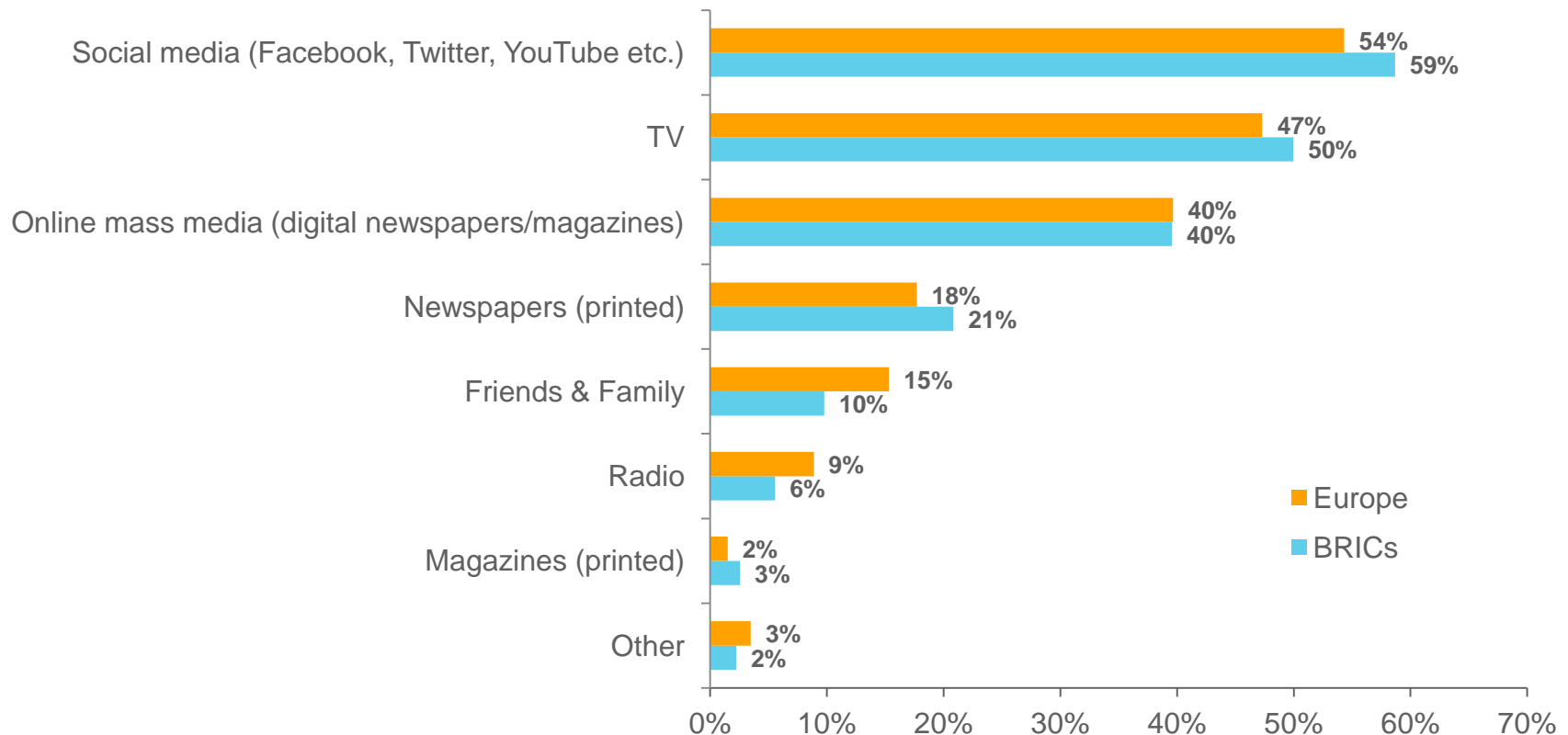


21%



TV - Number 2 News source!

If you could only choose two, which of the following would you say are your most important sources for news about what is going on in society?



Concluding remarks

- Media has fallen in ranking of the most attractive employment sectors
- NeoCon's - a window of opportunity for public service?
- Being where viewers are!
 - Online viewing essential to young generation
 - New competence?
- Trustmark – branding, branding, branding
 - Effortless solutions
 - What people want, when they want it!
 - All that we do we do through people!
 - HR becomes even more vital in brand building

Thank's for your attention!

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