
Turner Research Shares Key Insights on Plurals and Millennials' Media Consumption and Consumer Behavior During Thought Leadership Event in New York

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Furthering its role as an industry leader and resource for its business partners, Turner yesterday unveiled key research findings on two influential generations: plurals and millennials. The findings, which were gathered from multi-year custom research studies commissioned in partnership with Warner Bros., provide key insights into these demographics, their media consumption habits and their significant impact on broader businesses. The research was discussed during a daylong conference hosted by Turner's research division entitled **Deep Shift: Dealing with Disruption & the Young Media Consumer**, which included a roster of panels and presentations from thought-leaders across various industries and was attended by an audience of clients, advertising agencies, members of the media and other key business partners.

Some of the key questions addressed by the research presented at the **Deep Shift** event are featured below.

Who Are the Plurals?

Plurals are the generation of young consumers born after 1997, whose moniker and generational characteristics are shaped by the time period of their birth.

They are the **most diverse generation in history**, with Hispanics becoming the largest minority in the U.S. and, by 2011, fewer than 50% of live births in the country were Caucasian.

Plurals are **digital natives** who were born into a time of consumer-centric Internet; they don't know a world in which they weren't able to play a game, watch a video, share and interact with their friends and brands on social media, and purchase content and products on the mobile devices at their fingertips.

Having lived through the economic downturn and recession of the early 2000s, the historic election of President Obama, the legalization of same-sex marriage and much more, in their relatively short lives, they have witnessed **tremendous change and fragmentation** of society on many fronts.

From a media consumption standpoint, plurals are the biggest users of the digital and mobile space. They are "**entertainment omnivores**," using a wide variety of content carriers from television to digital to SVOD and more. Plurals choose and control the type of content they watch and the devices with which they watch it, carefully curating their entertainment experience and skillfully navigating between long-form and short-form content based on their needs.

Great, So What Does That Mean?

Building on this framework and understanding of the plurals generation, Turner presented **Deep Shift** attendees some key insights for businesses to consider when marketing to this group, including these

highlights:

- 1. The plurals generation is hardwired for choice and control.** Whereas millennials had to learn to deal with the ever-expanding amount of choices that became available to them as technology advanced, plurals expect and demand the choices and navigate them intuitively. They demand full control over their experiences, including choice of content, choice of platform and the power to go deeper, and the brands that are successful among this generation are the ones who understand and feed this demand.
- 2. Provide them with ways to be a fan as they age.** As part of the work of growing up, plurals constantly reinvent themselves, relying on the content and tools available to them to explore new interests and talents, and express themselves among their peers. As a result, brands need to provide a variety of experiences and opportunities for plurals to connect with their brands, and then empower them with the tools to express their fandom or relationship with them.
- 3. Never go dark.** Feeding this insatiable need for content wherever and whenever plurals demand it, it's imperative for brand owners to constantly refresh their products or content offerings throughout the year so that in between the Plural consumer's visit to their store or website, there are ample opportunities to stay connected to the brand.

Research on plurals was provided by Insight Kids, a division of Insight Strategy Group. Insight Kids is partnering with Turner on a robust longitudinal study that explores plurals' content needs, media behaviors, and emerging trends.

What Don't I Already Know About Millennials?

Millennials are a well-known, often-discussed generation, but what's less examined is the impact of life stages on this generation, which spans everyone from students living with their parents, single working adults living on their own or with roommates, married adults without kids, and parents.

Through the research, four subsets of millennials were identified – Student, Stable (working with no kids and not enrolled in school), Parent and Flex (those not in any other life stages), and the following insights were shared:

- 1. The life stage of millennials does impact media and consumer behaviors - but not necessarily how one would expect.** As millennials age and enter into new life stages like marriage or parenting, they are staying “millennial” in their consumption habits and not transitioning or “aging up” into Boomers or other generational categories. Having acclimated themselves to the variety of options made available to them, when it comes to entertainment options, millennials across all life stages demand choice, control and convenience - and those expectations are expanding beyond media and beginning to dictate consumer decisions.
- 2. Television is an integral part of life across all millennial life stages.** Whether it's live television, time-shifted viewing or streaming video, television continues to play an important role for all subsets of millennials. Reasons given for this include relaxation and destressing, forging social connections and bonding, and maintaining balance with other facets of life.
- 3. Branding is more important than marketing among millennials of all life stages.** As savvy consumers who are constantly exposed to marketing messages, millennials don't want to be sold - they want to be engaged. The most effective marketing message must fit and appeal to their interests and lifestyle, and be delivered in a way that's original and authentic.

Research on millennials life stages was provided by the Frank N. Magid Associates research group and

included a nationally representative online survey of 2,000 men and women 18-39 years old, plus a series of eight in-depth, in-home ethnographies conducted with millennials of various life stages and living arrangements.

“With some of the most recognized and consumed brands for plurals and millennials in brands like Cartoon Network, Adult Swim and truTV, the research we’ve done at Turner has furthered our knowledge and understanding of these generations and played a key role in our success,” said **Jeffrey Grant, senior vice president of research for Turner’s Emerging Consumers division**. “With a strong understanding of who these audiences are and how to best connect with them, we’re proud to share these insights with our business partners and continue to serve as a key resource for them.”

Turner’s dominance among the millennials and plurals generations can be seen in the portfolio’s performance in 2015. The Turner portfolio, spanning television, digital and mobile platforms, reached an average of 68% of adults 18-34 domestically per month, and is home to two of the top four cable networks among millennials: **Adult Swim** and **TBS**. **Adult Swim** once again proved itself to be the voice of a generation of millennials for the eleventh consecutive year as the #1 network with adults 18-24, 18-34 and 18-49. Powered by all new programming and a refreshed network brand, **truTV** delivered a young, educated and affluent audience with a median age of 33 and demonstrated strong growth across its VOD and social platforms. Leading news brand **CNN** dominated among millennials in both total time spent and time spent per person across platforms throughout the year. The social voice for sports, **Bleacher Report** closed 2015 as the top-ranked publisher in social interactions across Twitter, Facebook and Instagram, and #1 among all major sports apps with millennial males. Finally, a leading choice for plurals, **Cartoon Network** ended the year as television’s #1 ad-supported network with kids 6-11 and celebrated its second consecutive year as the only top kids channel to show growth across all platforms.

At the event, Turner executives also shared details about [Turner Ad Lab](#), a new joint initiative between the company and an advisory board comprised of research organizations, ad tech start-ups and the advertising community. The purpose of the Turner Ad Lab will be to study and examine advertising models in an effort to better consumer experiences on all platforms, while strengthening advertising effectiveness for brands.

About Turner

Turner, a Time Warner company creates and programs branded news; entertainment; kids and young adult; and sports media environments on television and other platforms for consumers around the world.

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