Draft

Planet 4

Audience research

April 2019

Audience research

1. Where we stand

Where we stand

During the discovery phase of the Planet 4 project, the design team conducted user interviews based on archetypes to help design the first version 2 years ago.

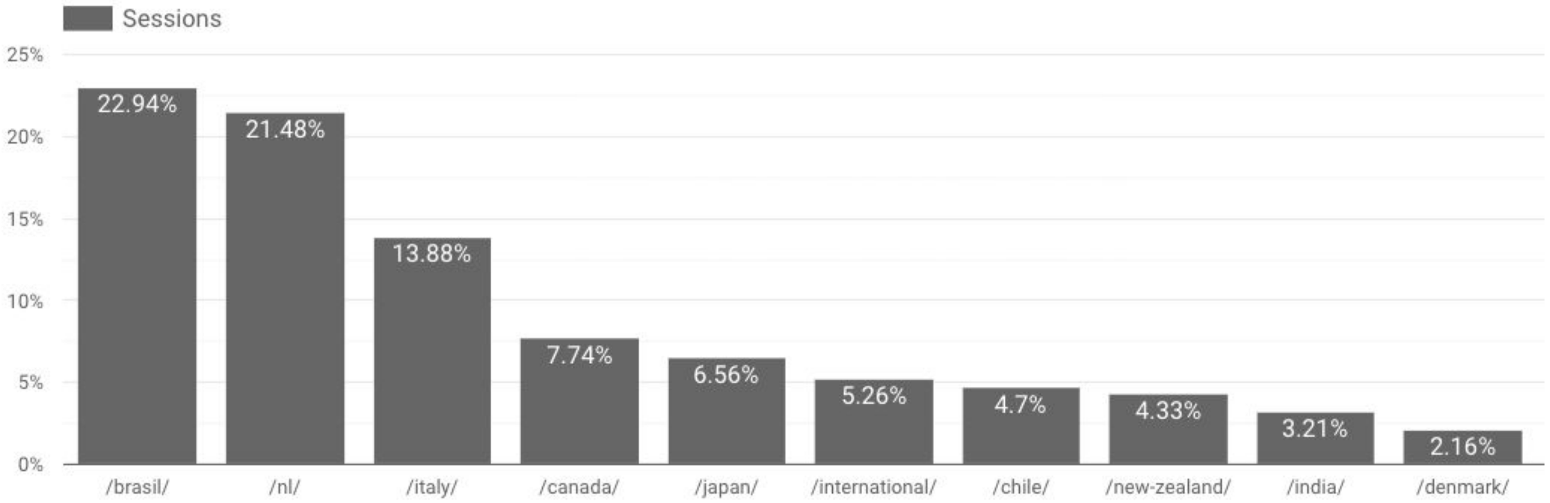
Since the first version is still running, P4 team have gathered quantitative data lately to see what our audience currently looks like, but also what could be our future target audience.

Where we stand

1 - Quantitative data: P4 audience* overview:

**P4 websites launched in 2018*

P4 websites that receive **most of the traffic**.



% of 2019 Q1 Total Sessions | P4 websites that launched until Dec, 31 2018.

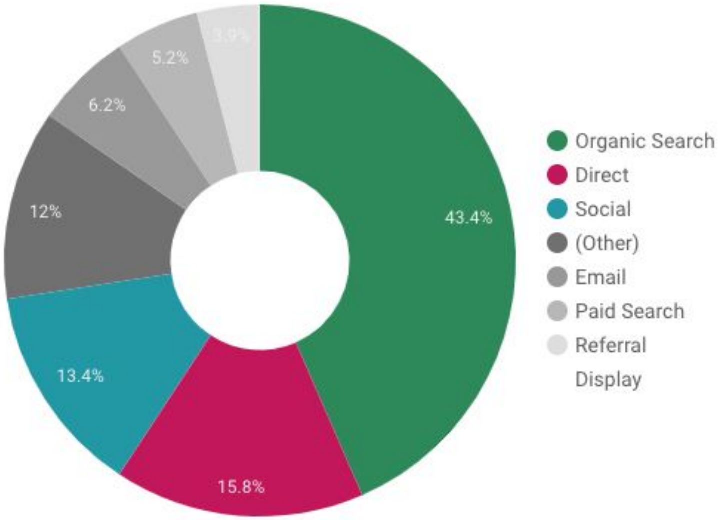
PLANET 4

Where we stand

1 - Quantitative data: P4 audience* overview:

**P4 websites launched in 2018*

Most of the traffic comes **from Organic Search**.

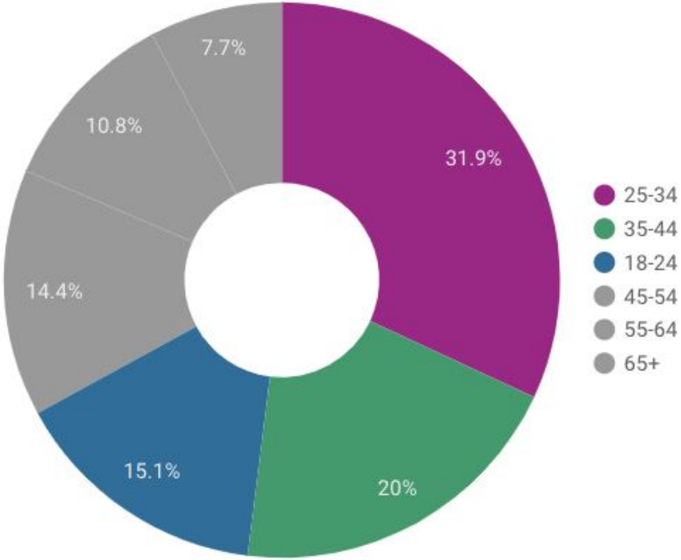


Where we stand

1 - Quantitative data: P4 audience* overview:

**P4 websites launched in 2018*

Generation Y (25-34 yers old) is responsible for 32% of Planet 4 global audience, followed by users from 35-44 years (20%), then Gen Z (18-24 y-o).

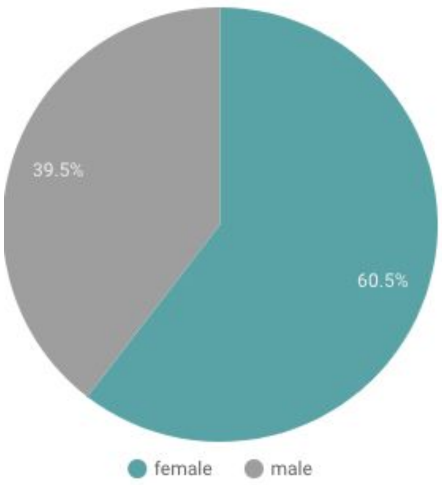


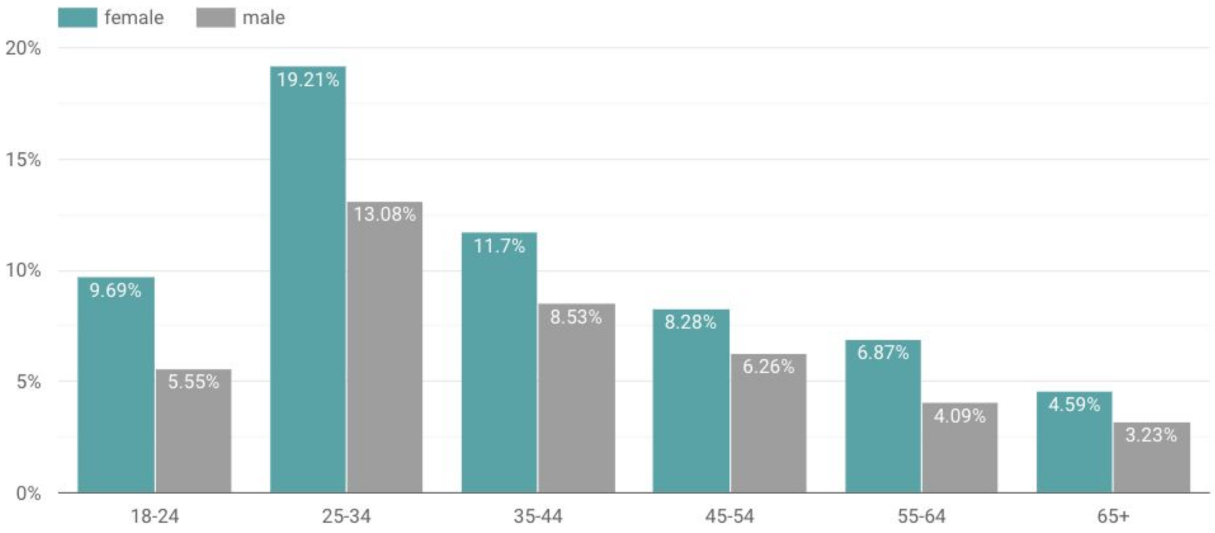
Where we stand

1 - Quantitative data: P4 audience* overview:

**P4 websites launched in 2018*

Our global audience is **mainly made up of female (60%) from Gen Y (Millennials).**





PLANET 4

Where we stand

1 - Quantitative data: P4 audience* overview:

**P4 websites launched in 2018*

GEN Y

India (53%), Mexico (48%), Colombia (45%) and International (40%) have the **largest share of Generation Y** (25-34) users.

GEN Z

Colombia (24%), Mexico (24%), India (23%) and Denmark (21%) have the **largest share of Generation Z** (18-24) users

35+

Netherlands (65.85), Japan (60.6%), New Zealand (61.8%) and Italy (59%) have the largest share of audiences with 35+

More than half of India, Colombia, Mexico, Chile and International audiences **have less than 35 years**

Female audiences

Netherlands (67%), Brazil (66%), Colombia (62%) and Denmark (62%) have the **highest share of female users.**

Male audiences

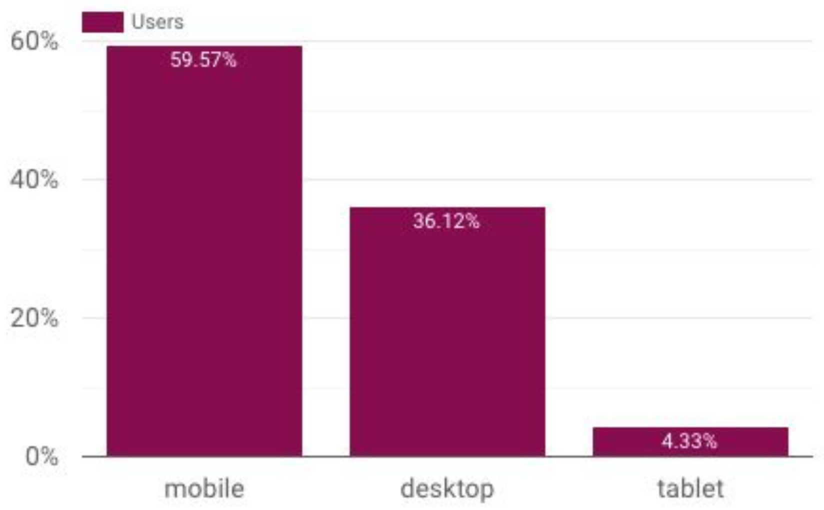
Japan in the **only country where the majority** of users are male.

Where we stand

1 - Quantitative data: P4 audience* overview:

**P4 websites launched in 2018*

Majority (60%) of Planet 4 users in 2019 Q1 were using **mobile devices.**

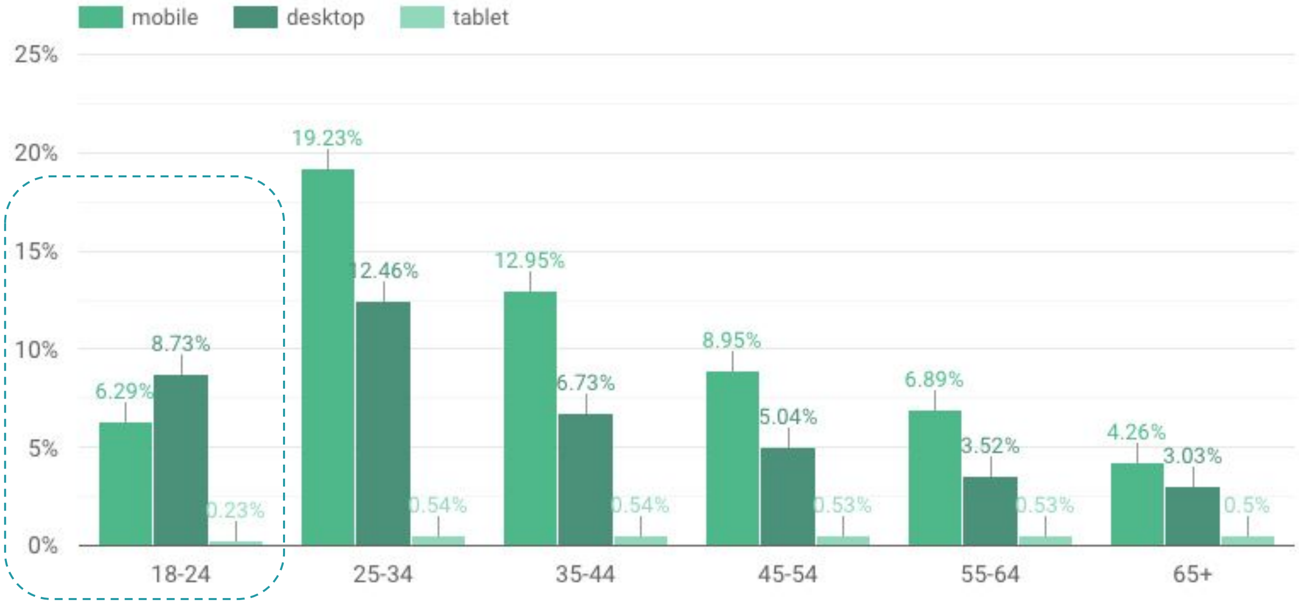


Where we stand

1 - Quantitative data: P4 audience* overview:

**P4 websites launched in 2018*

But **Gen Z** (18-24) is the only one where users are **mostly using Desktop** devices.

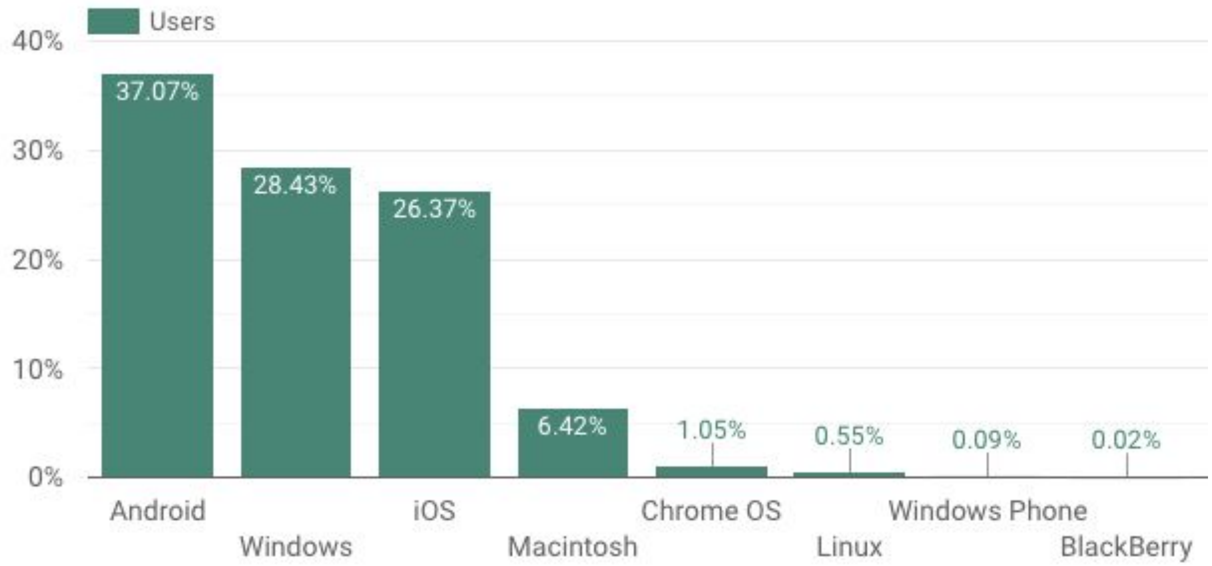


Where we stand

1 - Quantitative data: P4 audience* overview:

**P4 websites launched in 2018*

37% of our users are on **Android** followed by **IOS** on mobile devices, then **Windows** on desktop**.**



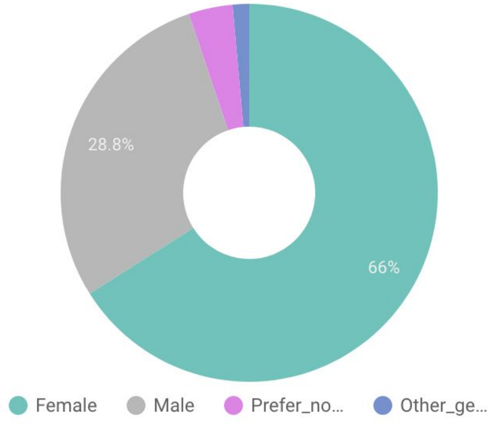
Where we stand

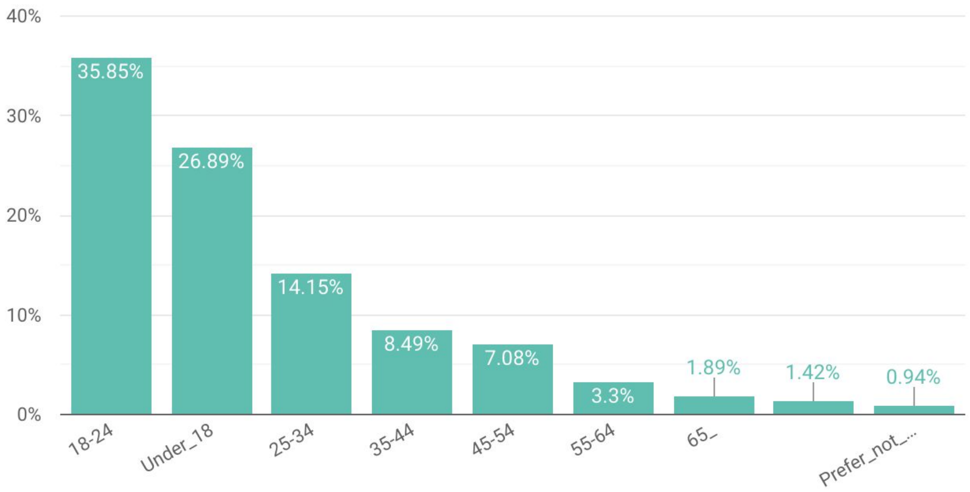
2 - Qualitative survey: P4 audience*:

**Ran on GPI website in 2019*

This survey was launched to confirm what our audience is, and what are their goals on our website.

Most of the respondents (212 responses) are **Gen Z (under 18 to 24 years old) and mainly female (66%)**.





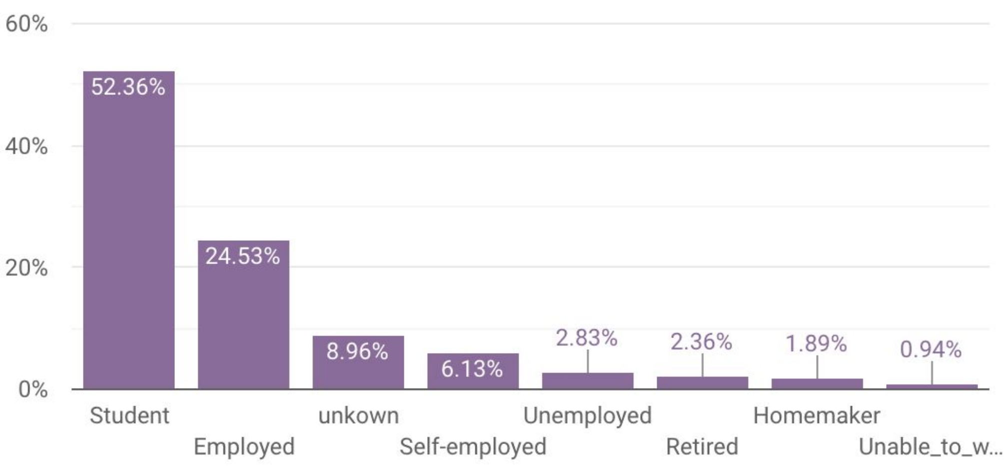
PLANET 4

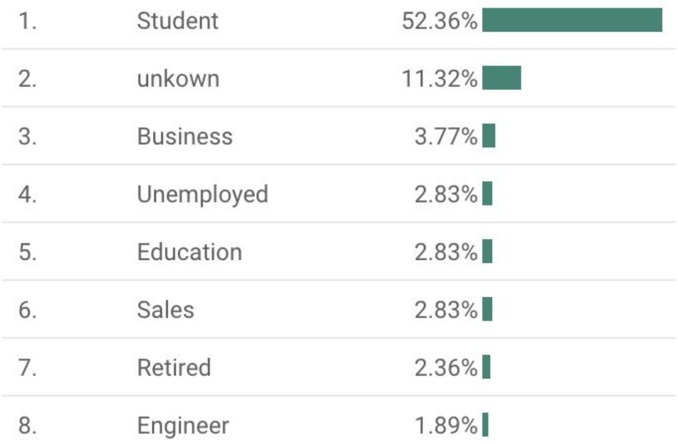
Where we stand

2 - Qualitative survey: P4 audience*:

**Ran on GPI website in 2019*

Most of them are mainly **students**, followed by **employed people**.



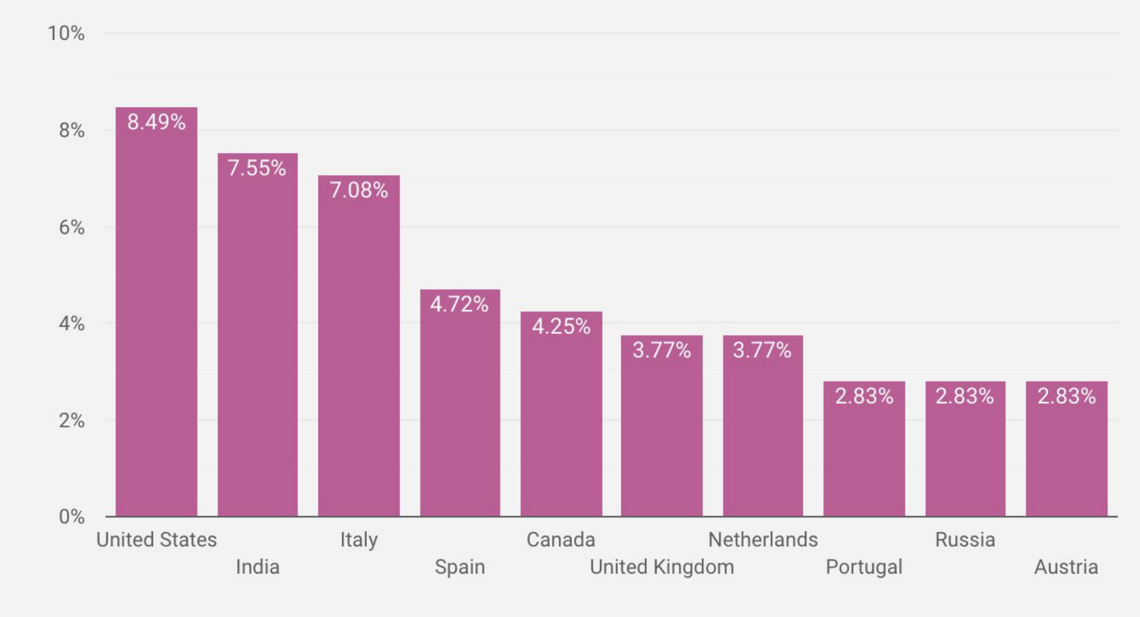


Where we stand

2 - Qualitative survey: P4 audience*:

**Ran on GPI website in 2019*

Most of the respondents **are from the US, India and Italy**



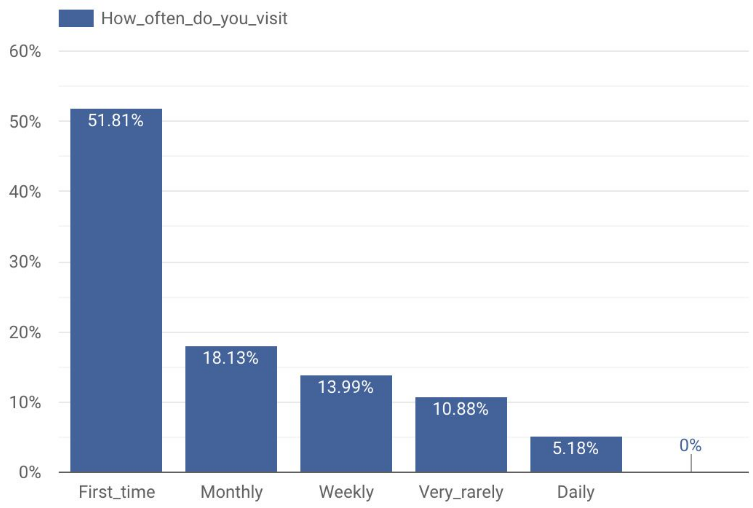
PLANET 4

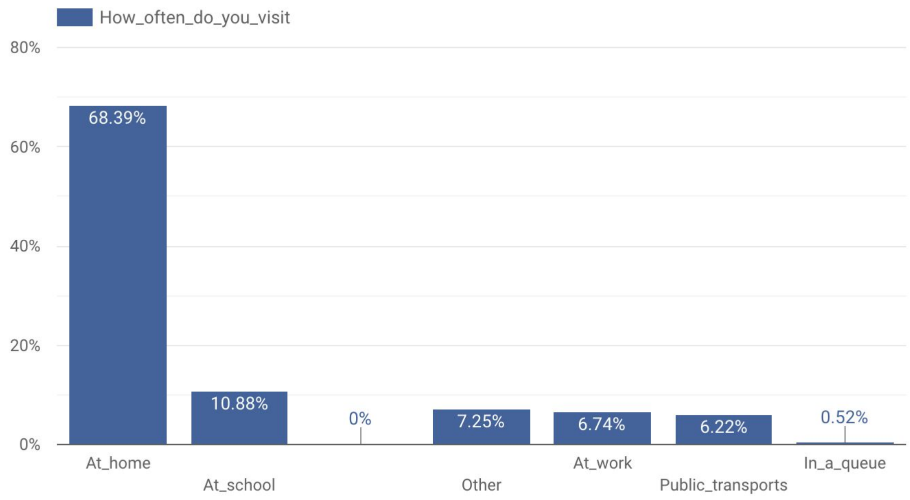
Where we stand

2 - Qualitative survey: P4 audience*:

**Ran on GPI website in 2019*

Most of the respondents **are first time visitors (51,8%) and visit the website mainly at home.**



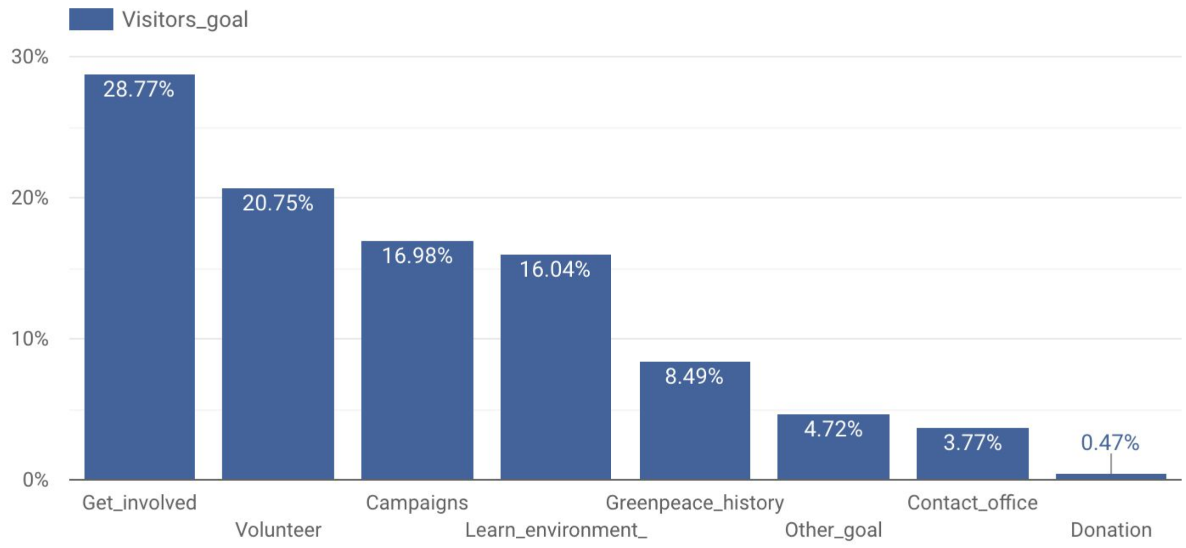


Where we stand

2 - Qualitative survey: P4 audience*:

**Ran on GPI website in 2019*

The main goals of their visit on the website are to **get involved (28,7%) and volunteer (20,7%)**.



Where we stand

2 - Qualitative survey: P4 audience*:

**Ran on GPI website in 2019*

Other goals could be **looking for a specific information, or bring GP in their country**.

1.	sign all the petitions i can
2.	see if there were any new 'acts'
3.	i am a student that is researching for a topic called sustainable/fair fashion.
4.	arguments against nuclear weapons
5.	Working on a school project
6.	View on veganism and the planet; Cowspiracy
7.	To bring gp in my country
8.	Need help with deforestation issues in Sri Lanka
9.	I'd love to be able to share everything Greenpeace stands for by posting to individual grou...
10.	I went to his website so I knew witch brands used palm oil so I knew what not to buy.

Where we stand

2 - Qualitative survey: P4 audience*:

**Ran on GPI website in 2019*

On average, the respondents **know GP by name, sign petitions or/and follow GP on social media platforms.**

Mobile

Know_Greenpeace_by_name	93	31.1%
Sign_petitions	80	26.8%
Follow_social_media	78	26.1%
Donate	19	6.4%
Im_an_activist	12	4%
Im_a_volunteer	10	3.3%
None_of_the_above_involved	7	2.3%

Desktop

Know_Greenpeace_by_name	21	29.2%
Sign_petitions	20	27.8%
Follow_social_media	18	25%
None_of_the_above_involved	5	6.9%
Im_an_activist	4	5.6%
Donate	3	4.2%
Im_a_volunteer	1	1.4%

Where we stand

3 - User research (2016-2017)

22 individual interviews based on a common interview guide were conducted by P4 team members from 12/2016 to 1/2017 in Romania, Russia, Mexico, and the United States in participants' native languages.

They looked for people who fit the archetypes identified for P4 launch and interviewed them about their experiences around taking action.

Where we stand

3 - User research (2016-2017)

Current archetypes:

Archetypes are similar to Personas but they are more shaped around a behavioral perspective. Each archetype represents a relatively distinct group of people who might visit a website or use a product.

Based on user research, they are focused on key motivations, goals, and behaviors relevant to what is being designed.
Archetypes are a great way to validate interactive elements and user flows at a macro level.

During the discovery phase of the Planet 4 project, the research team came up with an initial set of seven archetypes. These archetypes were derived by combining past audience research (at Greenpeace and externally) with intuition based on experience (aka taking a SWAG) and then ultimately developing distinct groupings, focused on goals and motivations relevant to this project.

Where we stand

3 - User research (2016-2017)

Current archetypes:

From that initial group of seven, P4 design team **focused on 2 of them** (end users) for the first design iteration:

Stewards:

Concerned about future generations and feel guilty for not doing more, want to set a good example. Internally motivated and have both expertise and (some) time to give. Regularly read environmental news, sign online petitions from time to time when they come via emails, but unsure of impact. They want to leave their (and others') children a healthy planet and improve the larger community.

Connected Evangelists:

Thoughtful progressive beliefs based on widely accepted facts. Regularly share articles and post political opinions on social media. May engage in online debate. Feel strongly about ideas and want to enlighten others.

Audience research

2. Next steps

Next steps

Although a user research was conducted to help design and shape the first Planet 4 version two years ago, we should now take into consideration what quantitative and qualitative data shows, and **start a deeper conversation with this audience.**

But we should also consider talking to the coming next generation, **Gen Z**, who **seems to be more likely to engage in causes than Gen Y**, as market research proves.

Hence, we should invest more time to get to know this young audience better to provide them with a **tailored design, content, tone of voice and user experience**.

Next steps

Objectives:

- find out what the audience **desires, goals & motivations** are in general.
- identify **barriers** they might have.

To **have people embrace P4 product** we need to **include them as most as possible in our design process:**

- We should speak directly with a sample of representative users who are already supporting Greenpeace, but also people who are not involved with GP yet.
- These would be people across regions who is part of our current and our future Planet 4 audience.

We also need to confirm whether or not the **project** concept and engagement features meet our audience expectations. Which is why this next user research will help us **refine existing archetypes**, then create realistic scenarios to keep on building **a better design & user experience for this audience**.

PLANET 4

Next steps

What we need to know

Who our current & future audience is:

- Values, beliefs.
- Daily habits (online / offline).
- Interest/Hobbies (online / offline).
- Products or media they use regularly (online / offline).
- Design they like or that inspire them (online / offline).

Their implications:

- Level of engagement in their daily life (online / offline).
- Level of engagement in their daily life (alone / with a community).
- Level of engagement with GP or other organizations (online / offline).

Next steps

What we need to know

Their motivations:

- What drive them to take action (online / offline)?
- What prevent them to take action (online / offline)?
- What might help them to take action (online / offline)?
- What do they want to achieve when they take action?
- What needs, challenges, and frustrations do they have?
- What might help them to keep on taking actions (online / offline)?
- How digital (an app, a website, social media…) might help them achieve their goals?

Next steps

Methodology

We can use different user research methods to get to know our audience better, such as surveys, focus groups or user interviews. According to what outcomes we want to get from this research, we won't use the same methods.

For each method we will use, we'll write a guide for internal or external GP people to help us conduct this research.

Next steps

Methodology

Surveys:

We can run surveys as a quantitative method, in addition to our quantitative data to confirm what our audience is, and what are their goals on our website. It is a good way to start this research before we run more in-depth interviews.

We are also planning to run this survey not only on the GPI website but also on P4 websites to have a global overview of the P4 audience.

Next steps

Methodology

Surveys:

Pros:

- Useful to confirm P4 audience demographics in addition to our quantitative data.
- Useful to collect more detailed information about visits frequency, age, status employment, etc.
- Useful to know main user goals on the website.
- Doesn't cost anything and easy to set up.

Cons:

- We cannot get all the answers we want in one survey.
- It has to be completed with a Focus Group and/or users interviews.

Next steps

Methodology

Focus Group:

Conduct a focus group is a great way to get people in the same room (6 to 12 people) and have them talk about a product. It is really helpful to **assess user needs and feelings**. It often **brings spontaneous reactions** and ideas and let us observe some **group dynamics** and organizational issues.

To be effective, we should run a focus group in each region where GP is to have a representative panel of our global audience.

Potential NROs where to run a focus group:

- Europe (Netherlands / Italy?)
- South America (Brazil)
- North America (Canada)
- Oceania (New Zealand?)
- Asia (Japan / India?)

Next steps

Methodology

Focus Group:

Pros:

- It is a great way to create group dynamics and to get spontaneous feedback.
- Share ideas about important topics with peers could be fun for participants.
- It is a useful way to gather feedback from different people.
- We could let participants be creative and have them create their own moodboard that inspire them for instance.
- It's a time saving opportunity compare to running and analysing individual interviews.

Next steps

Methodology

Focus Group:

Cons:

- It could be long and complicated to organize a focus group per region.
- It is more effective to conduct a focus group offline than online.
- The most effective way to conduct a focus group without bias, is to have an experienced moderator to run the session, but it could be very expensive to do it for each focus group we want to run. Seasoned moderators can greatly impact the outcome of a focus group discussion.
- It could be ran internally by a GP person who is good at moderating discussions, but this person has to be available for the project and be willing to help us organize all the sessions.
- Compared to individual interviews, focus groups are not as efficient in covering maximum depth on a particular issue.
- Participants may not express their honest and personal opinions about the topic at hand.

Next steps

Methodology

Individual interviews:

Interviews can be a great way to **empathize with our supporters** because they can give us an **in-depth understanding** of their feelings, motivations, and daily routines, or how they use other products.
When interviews are well conducted with a seasoned interviewer, they can provide great valuable insights for a design project.

Ideally, we should have one interviewer and one dedicated note taker for each session.

To be effective as well, we should run individual interviews in each region where GP is to have a representative panel of our global audience.
Ideally, we should run 5 interviews/country (see the list of potential NROs where to run interviews or focus group).

Next steps

Methodology

Individual interviews:

Pros:

- Users can be more comfortable to talk about their personal feelings, beliefs, and habits without being influenced by other people such as on a focus group.
- It is less expensive than focus groups because it could be conducted online.
- Users can do the interview where they want if it's an online interview, so they might be more comfortable in their context.

Cons:

- It is more time consuming than focus groups because we have to do more interviews to get more valuable insights, and we have to analyse each interview afterwards.
- It could be ran internally by a GP person who is good at interviewing people, but this person has to be available for the project and be willing to help us organize the sessions.

Next steps

Methodology

Individual interviews:

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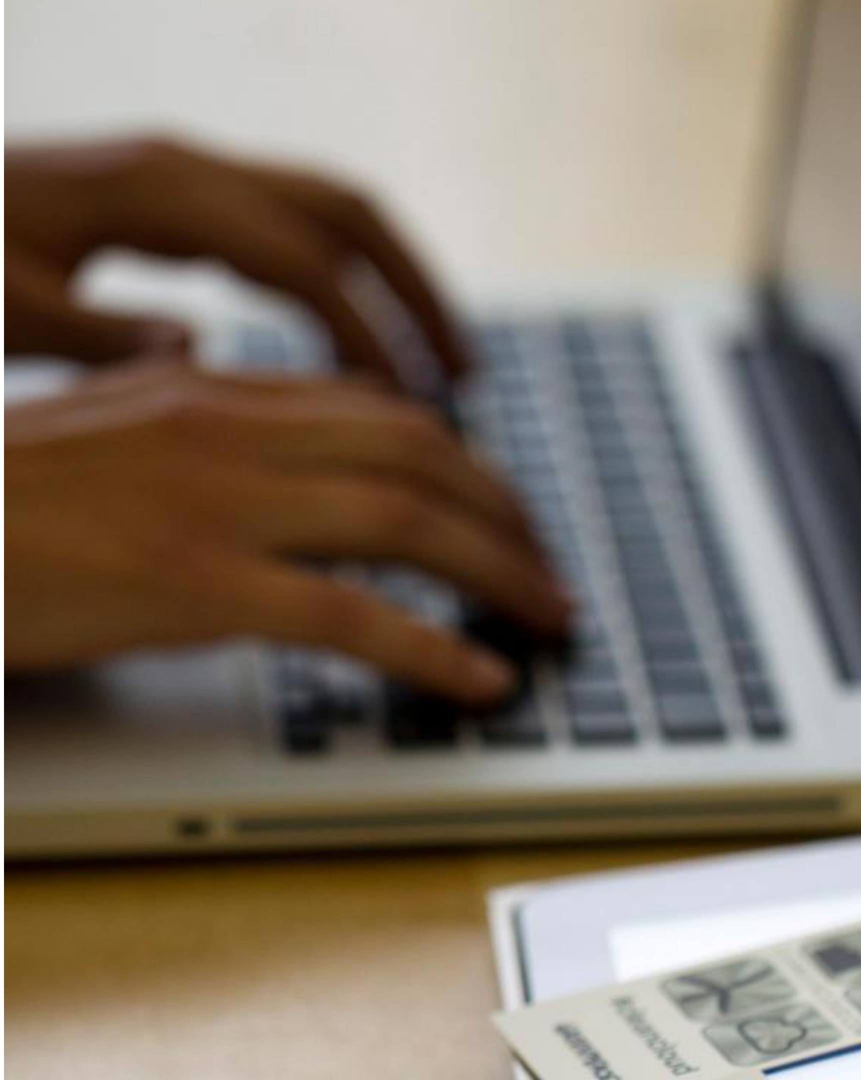
Audience research

3. What we know from market research



1. Gen Y & Z engagement

From several researches in the UK & the US (see sources)

Gen Y* (Millennials)

*25-34 years old

The act of **doing good as part of their everyday life** is the legacy of the Millennial generation.

- Millennials interest in improving life for themselves or people they know remains steady over time.
- They are driven to **engage locally** more than nationally.
- They may take actions they don't necessarily think will help the most, such as donating or using social media.
- Most Millennials don't see themselves as supporters rather than activists.
- They have redefined activism by combining protests, social organizing and social media messaging as individuals and in the aggregate.

1. Gen Y & Z engagement

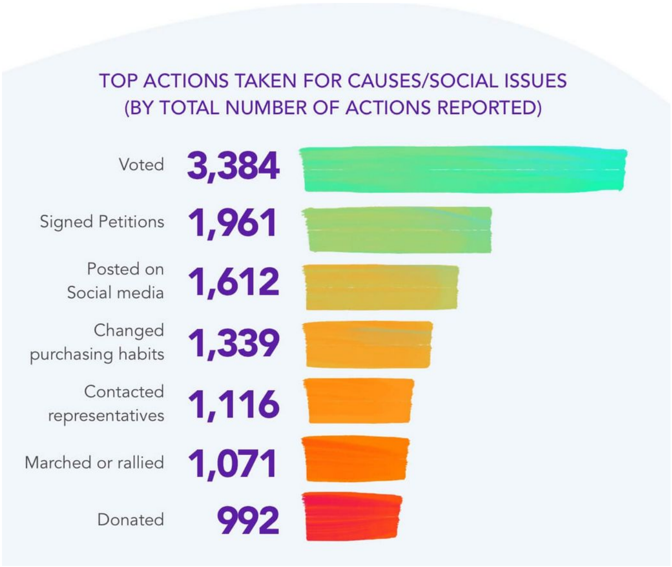
From several researches in the UK & the US (see sources)

Gen Y* (Millennials)

*25-34 years old

What they care about:

- Millennials **are not committed to a single organization**, they are more committed to a cause.
- Their loyalty is to an issue they care about. And whether they give money or volunteer, it's not necessarily directed at one organization.
- Millennials are compelled to engage on issues that benefit the greater good like climate change.
- Barriers to engagement continue to come down and the influence of individual actions can have a broader reach thanks to technology.



1. Gen Y & Z engagement

From several researches in the UK & the US (see sources)

Gen Y* (Millennials)

*25-34 years old

Their level of engagement:

- Some Millennials remain at the micro level of engagement, some move to leadership roles and many move within the space in between.
- Millennials acting in small ways individually often create leverage as a large, active group capable of influencing greater change.
- They often invite friends to join their volunteer efforts and are more likely to engage in a cause if their peers are already participating.

1. Gen Y & Z engagement

From several researches in the UK & the US (see sources)

Gen Z*
*under 24 years old

Recent studies found that **26% of 16-19-year olds already volunteer on a regular basis** in the US. Nearly half of 14-16 year olds (46%) say they have given their time to help out people in the community in the past two years in the UK.

They want to make a difference in the world: 60% want their jobs to impact the world, 76% are concerned about humanity impact on the planet.

Gen Z **prefers incognito media platforms** (snapchat, secret, whisper). 25% of 13 to 17 years old left Facebook in 2014.

1. Gen Y & Z engagement

From several researches in the UK & the US (see sources)

Gen Z*

*under 24 years old

41% of Gen Z spend **3+ hours a day on computers** for non-school work-related activities and use **5 screens** on average.They mainly **communicate with images.**They also are future-focus and realists and create things.

GenZ **know how to self-educate and find information**: 33% watch lessons online, 20% read textbooks on tablet, 32% work with classmates online. 52% use Youtube or social media for typical research assignments.

Gen Z are **less likely than Millennials to blindly trust information** simply because it's online. ‘Fake News’ has become a throwaway punchline to us, but Gen Z take it seriously.

And so, they have developed **a different relationship to the internet, and learning in general.**

1. Gen Y & Z engagement

From several researches in the UK & the US (see sources)

Gen Z*

*under 24 years old

How we might communicate with Gen Z?

- Communicate visually to a diverse audience across screens is key.
- But we should provide them with experience not only digital but also tangible.
- Communicate with short content (think "snackable" content).
- Provide them with private spaces to communicate with their closest community.
- Feed curiosity and tap into an entrepreneurial spirit.
- Educate and build expertise.

2. Digital trends & Social media usage in 2019

Global market research conducted by "We Are Social" and "Hootsuite's"

Overall information

- There are **4.39 billion** internet users in 2019, an increase of 366 million (9%) versus January 2018. Internet users are growing at a rate of more than 11 new users per second, which results in that impressive total of one million new users each day.

- There are **3.48 billion** social media users in 2019, with the worldwide total growing by 288 million (9%) since this time last year.

- **3.26 billion** people use social media on mobile devices in January 2019, with a growth of 297 million new users representing a year-on-year increase of more than 10 percent.

2. Digital trends & Social media usage in 2019

Global market research conducted by "We Are Social" and "Hootsuite's"

Internet user behaviours

The ways in which people use the internet are evolving quickly, with mobile accounting for an ever-increasing share of our online activities.

- On average, the world's internet users **spend 6 hours and 42 minutes online each day**.

- **Google continues to dominate the rankings** of the world's most visited websites. **YouTube** comes in at number two, while **Facebook** takes the third spot.

2. Digital trends & Social media usage in 2019

Global market research conducted by "We Are Social" and "Hootsuite’s"

Internet user behaviours

- GlobalWebIndex reports that **92 percent of internet users now watch videos online each month**, meaning that more than 4 billion people around the world are consuming online video content in early 2019.

- The ways in which people ‘interface’ with the internet are changing too. The **use of voice control** tools increased significantly during 2018, with roughly four in every ten internet users now using voice commands or voice search every month.

2. Digital trends & Social media usage in 2019

[Global market research conducted by "We Are Social" and "Hootsuite's"]

Social media & user behaviours

Worldwide social media user numbers have grown to almost 3.5 billion at the start of 2019, with **288 million new users in the past 12 months** pushing the global penetration figure to 45%.

- GlobalWebIndex reports that the **average social media user now spends 2 hours and 16 minutes each day** on social platforms, which equates to roughly one-third of their total internet time, and one-seventh of their waking lives.

- It's worth noting that the **time spent on social media varies considerably across cultures** though, with internet users in Japan spending an average of just 36 minutes on social media each day. At the other end of the scale, Filipinos continue to spend the most time on social media, with this year's average of 4 hours and 12 minutes reflecting an increase of 15 minutes per day (6 percent) versus the average that we reported last year.

2. Digital trends & Social media usage in 2019

[*Global market research conducted by "We Are Social" and "Hootsuite's"*]

Top Social Media platforms

- Despite a troubling year in 2018, **Facebook** maintains its top platform ranking in early 2019, there's little evidence to suggest that people are leaving the platform in any significant numbers. In fact, Facebook's monthly active users (MAU) numbers grew steadily across the past 12 months.

- Despite some leadership hurdles in 2018, **Instagram** have passed the 1 billion 'active accounts' mark.

- 2018 was less favourable to **Twitter**, who reported declines in global active users in their two past earnings announcements which indicate that Twitter's total addressable audience has fallen by 1.5% since October.

- **Snapchat**'s latest numbers tell an even more worrying story than Twitter's. The company's latest earnings announcements have shown steady declines in daily active users.

2. Digital trends & Social media usage in 2019

Global market research conducted by "We Are Social" and "Hootsuite's"

Mobile users

The number of people around the world who use a mobile phone **increased by 100 million in 2018.**

Users are worried about the use of their data

- **Retreat to private spaces**: To escape noisy news feed, users have flocked to private digital spaces like Stories, Facebook Groups and messaging apps. So brands have to consider that concern, otherwise they risk to be ignored if they fail to deliver personalize content.

- **Privacy concerns**, changes in people's social media preferences and behaviours, and broader fatigue with existing platforms will all combine to inspire a series of new social platforms in 2019, perhaps making **use of new innovations** like SOLID created by the creator of the Internet, Tim Berners Lee. The concept of this new platform is to let users own their data and choose apps to manage it.

2. Digital trends & Social media usage in 2019

Global market research conducted by "We Are Social" and "Hootsuite's"

Live content format & new platforms will change the digital landscape:

- **Short content formats** have dominated the Internet and the social media platform in particular. Now, more platforms are taking on traditional media and getting into the long form game, both live and pre-recorded.

- **Digital detoxing:** Some users are shifting from being always on their devices to more conscious intentional usage, helped by features that allow users to monitor usage.

3. Ressources

Planet 4 audience researches:

- First audience research (2016-2017)
- Archetypes (2016-2017)
- GPI audience survey (2019)
- P4 audience overview (2019)

Greenpeace audience researches:

- Engagement Research Database (all)
- Facebook fans of GP
- Global Polling:
  - Civis Dashboard (2018)
  - Full Questionnaire
  - Greennet documentation
  - Segmentation:
    - Glocalities Model
    - Values Based Audience Segmentation (or VBS)
    - Sinus Milieus Segmentation

3. Ressources

Global market researches:

- Global Digital use 2019 reports
- Millennials engagement
- Millennials myth & reality
- We are Gen Z
- Getting Gen Z Primed to Save the World
- GenZ - beyond binary