



BAUER MILLENNIALS



MEDIA GROUP



BAUER KNOWLEDGE
THE MILLENNIALS CHAPTER



BAUER
MEDIA GROUP

01

Introduction

02

**Step into their
world**

03

**Understanding
the segments**

04

Implications



WHY MILLENNIALS



More than one in four UK adults are Millennials



Continues to be a highly valued audience

Audience growing to 17m in 2019



Facing a storm of challenges (housing ladder, youth unemployment, FOMO)



THE MILLENNIAL JOURNEY WE'VE BEEN ON...

STAGE 1

Kick-off with
Bauer's Millennials

STAGE 2

Segmenting
the audience
attitudinally

STAGE 3

The Hub:
Millennial
Community

STAGE 4

Sizing community
behaviours

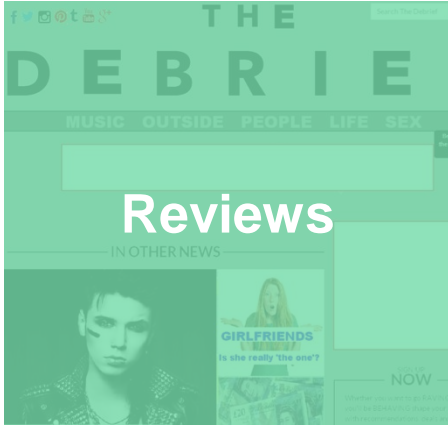
OUR GOAL: To provide an unparalleled, in-depth analysis of current Millennial behaviours and the implications for brands

AN ARRAY OF INNOVATIVE TASKS...

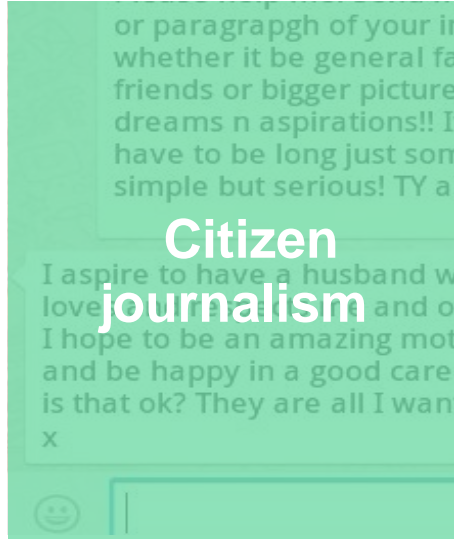
3,000+ Millennials

50+ Tasks

1,000s of posts



Reviews



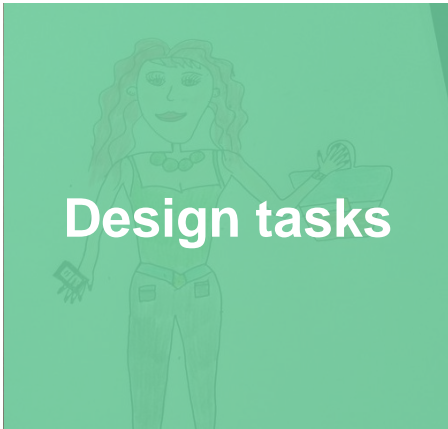
Citizen journalism



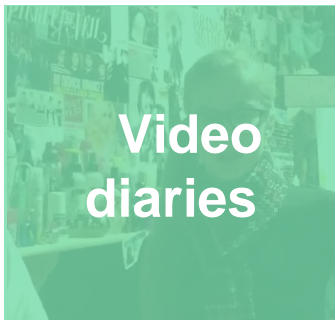
Create-your-own hierarchy of needs



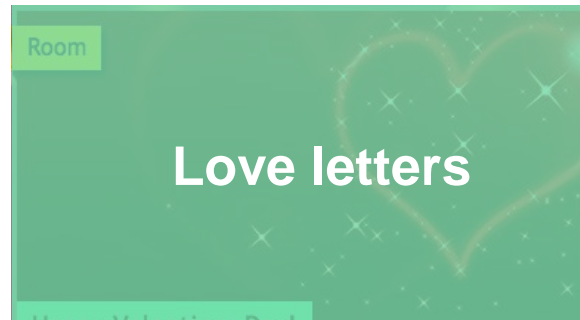
Co-creation



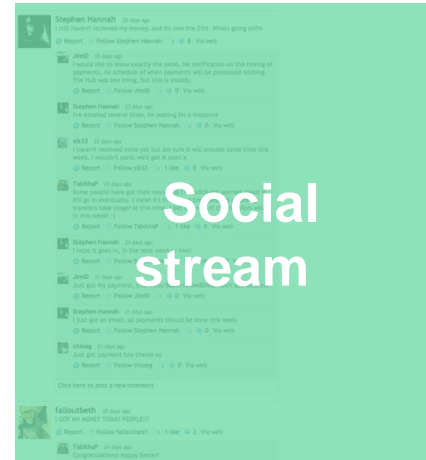
Design tasks



Video diaries



Love letters



Social stream

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To understand Millennials,
we first need to understand
their world – the
generational backdrop that
influences how they think,
feel, interact and progress...



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TWO CORE PRESSURES ARE IMPACTING



POST RECESSION ECONOMY

MONEY IS TIGHT

GOOD JOBS ARE HARD TO GET

- Millennials need to think differently to progress
- 67%- 'Harder than ever to find a desirable job'
- 42%- 'Struggle with their finances'



DIGITAL WORLD

'ALWAYS ON' CULTURE

FOMO

- Living their lives online means self esteem is pressured and exposed
- 56%- 'I'm constantly checking social media to make sure I'm up-to-date'
- BUT 42% feel like 'they are constantly bombarded by updates from friends, news'

MAKES WORK/LIFE BALANCE HARDER THAN EVER



- Seek meaningful experiences in both work and 'life', but some struggle to achieve the balance they want
- Career is a significant challenge post-recession
- Constant connectivity makes work/life boundaries hard to maintain
- 1 in 3 media stack 'to keep up with job/work'

*"Young people have a lot of things which demand our attention,
so getting the balance right is hard"*

Zoe, 20, 4Music

RESILIENCE AND FLEXIBILITY ON THE RISE

Millennials have responded to the pressures they're under by adopting an innovative mindset and a sensible, functional approach to life

01



INNOVATION

Desire to innovate and work for companies that reflect this in their working culture

02



RESOURCEFULNESS

Inventive, smart and hungry, seeking real-life experiences that make the most of their limited means

03

ENTREPRENEURIALISM

High respect for self-made success, 'hacker' mindset – look for unexpected routes to success

"Youth today are one of the most active and creative [generations] – constantly finding things – secret cinemas, ginger lines, festivals, music, food..."

Martin, 27, Kerrang!

MILLENNIALS ARE EXPERT KNOWLEDGE GATHERERS

Immersion in digital leads to two types of knowledge as currency



Shallow/general knowledge helps them keep up and fit in

“TV has become integral to Saturday nights - everyone is always talking about that one show whether it be The Voice or BGT. You feel as if you’re missing out if you don’t watch it”

Zoe, 20, 4Music

Deep/niche knowledge helps them progress, stand out and bond with kindred spirits

“I want to read about stuff I don’t know about. New perspectives from the collective norm. Excite me, motivate me, educate me and entertain me”

Jamie, 34, FHM



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EXPERIENCE: THE NEW STATUS SYMBOL



- Unique, fleeting and personal, the experience is Millennials' ultimate bespoke status symbol
- 74% agree 'I enjoy the shared experience of events'
- 77% agree 'I love having new and original experiences'

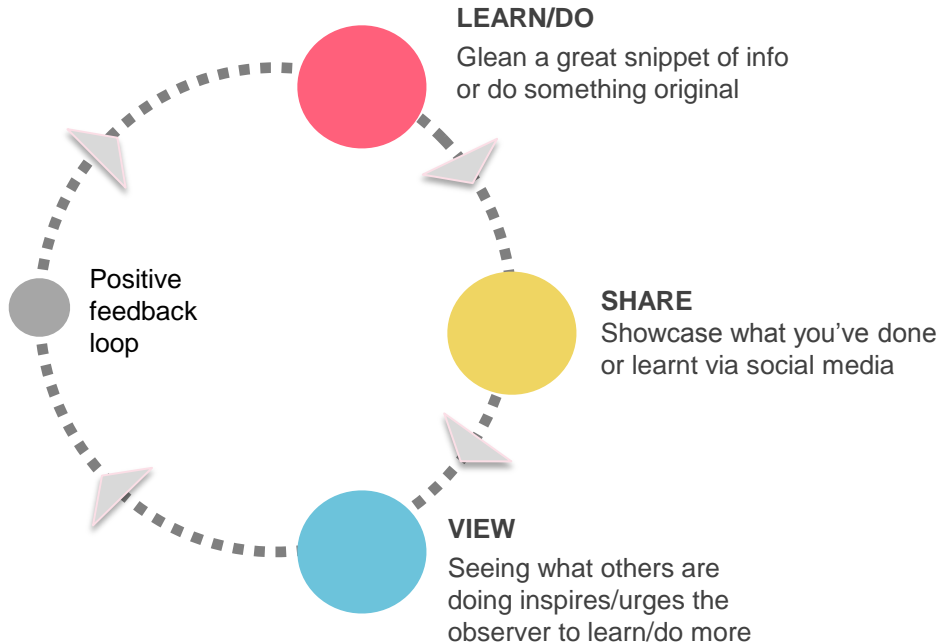
"Owning something hasn't got the social points it used to – 'I got the new iMac first' these days gets trumped by 'I went to see Beyoncé last night'"

Martin, 27, Kerrang!

"Experiences mean you have more to talk about – for example, I taught English in Sri Lanka during my gap year – I can say a lot more about that than a skirt I bought"

Amy, 28, KISS

SHARING DRIVES PROLIFERATION



71% agree 'I'd rather tell people about something I've done than something I've got'

"I do enjoy buying things and experiencing things, but I share experiences more. The ability to share experiences seems to be what is driving them more than ever before"

Antony S, 28, FHM

LOVE & HATE RIFTS WITH MEDIA BRANDS

While Millennials love media brands and rely on them throughout the day, they hate the sense of compulsion that can creep in



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SEGMENTING 15.8M UK MILLENNIALS

1. BACKGROUND RESEARCH & WORKSHOP

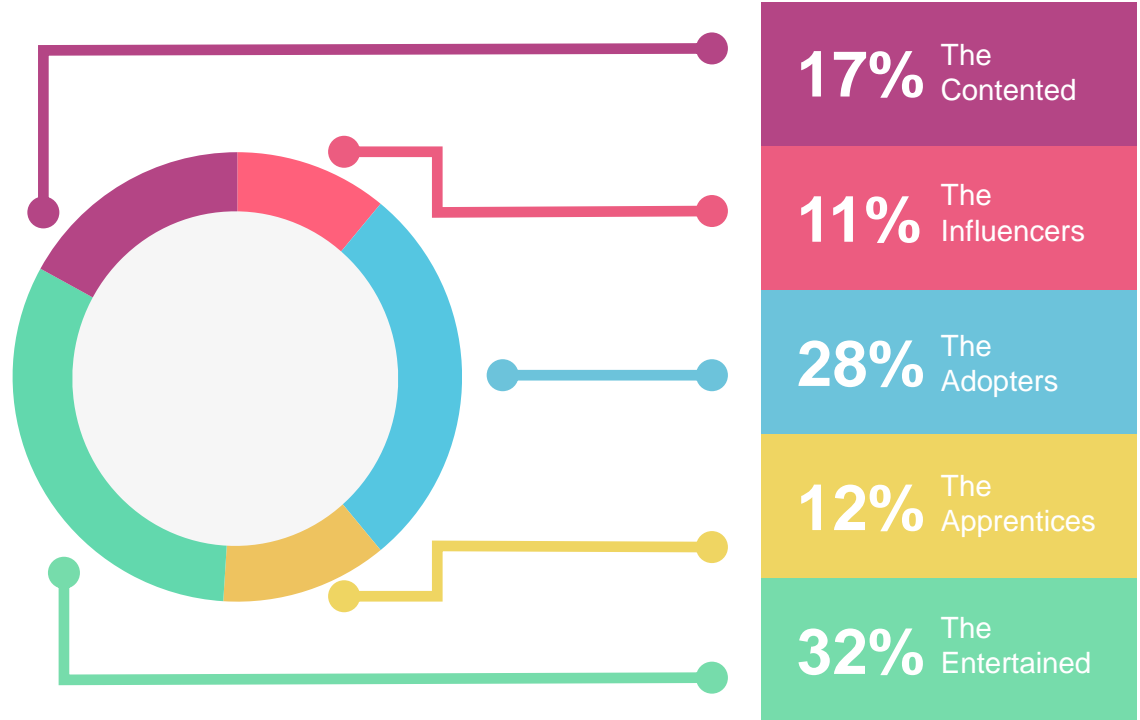
Defined what's important to Millennials (Entertainment, Information, First to Know, Trends, Respect, Style, Stand Out, Brands, Progress)

2. FIND STATEMENTS MATCHING MILLENNIAL NEEDS

TGI Clickstream segmentation across consumers aged 16-34

3. RAN SEGMENTATION

To drive robust understanding of the diverse Millennial audience



UNEARTHING THE SEGMENTS



1.7m

- High media usage
- More likely to be male

THE INFLUENCERS

Have their voice and like it to be heard – especially online



4.5m

- High media usage
- More likely to be ABC1

THE ADOPTERS

Peer respect is key; use knowledge & appearance to stand out



1.8m

- Younger
- More likely to live in London

THE APPRENTICES

Focused on self progression rather than keeping up with trends



5.0m

- Older & more likely to have children
- More likely to be ABC1

THE ENTERTAINED

Personal relationships are key, look to media brands primarily to entertain



2.7m

- Older & more likely to have children
- More rural living

THE CONTENTED

Satisfied with life and don't chase the latest trends

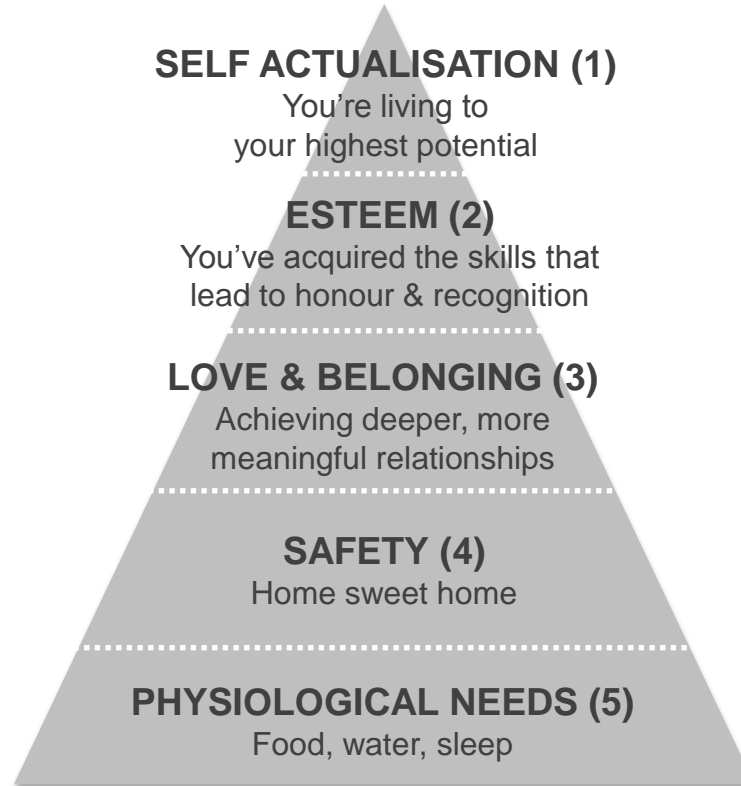
MEET THE SEGMENTS



UNDERSTANDING UNDERLYING MOTIVATIONS

THEORY

- In 1943 Maslow stated that people are motivated to achieve certain needs.
- When one need is fulfilled a person seeks to fulfil the next
- This five stage model can be divided into basic (or deficiency) needs (e.g. physiological, safety, love, and esteem) and growth needs (self-actualization).



MILLENNIALS' TASK

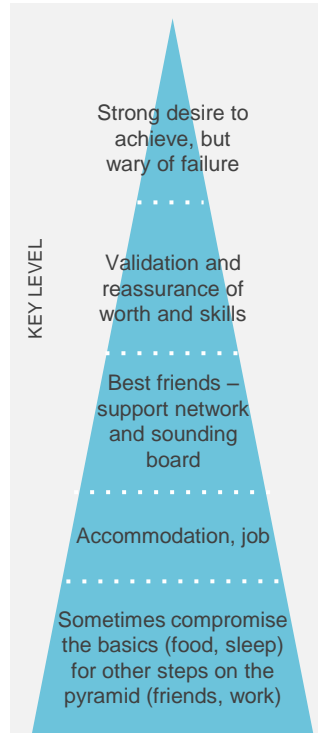
- We asked our Millennial community to highlight all things that are important to them by using Maslow's framework....
- We then looked at the differences by segment

MOTIVATIONS DRIVING SEGMENTS

THE INFLUENCERS



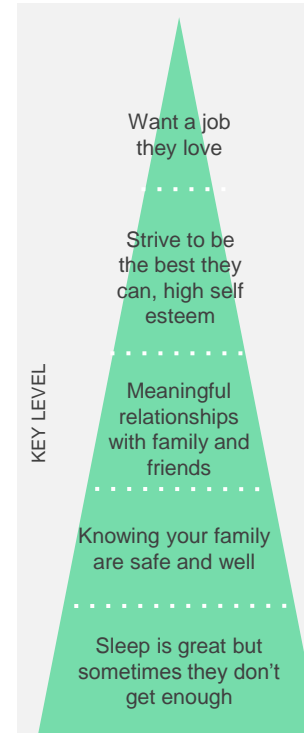
THE ADOPTERS



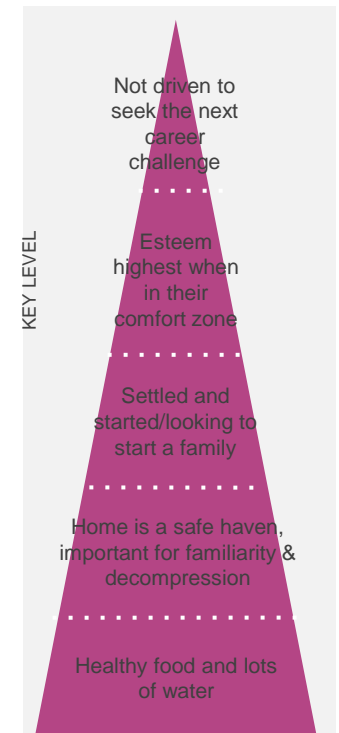
THE APPRENTICES



THE ENTERTAINED



THE CONTENTED





THE INFLUENCERS



INTRODUCING THE INFLUENCERS



HIGHEST MEDIA CONSUMPTION

Average 66 hours per week

Exhibit the widest range of media behaviours

CREATIVE AND INFLUENTIAL

Highly active online

Like their voice to be heard

Follow trends heavily

KEY DRIVERS:

Self expression

Pursuing passions

NEW SOCIAL CHANNELS FULFIL CREATIVE NEEDS

Some platforms are standard and everyone's on them...



The Influencers' confidence and affinity with social media help make them highly influential amongst their peers

But The Influencers love creative and transitory platforms too – 70% agree 'I consider myself to be a creative person'



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We Heart It. It's like Pinterest but more addictive! It's really creative and is inspirational

ZoeD, 20, 4Music



Instagram – because it's so easy to edit a picture, upload it and automatically share it

Lex, 28, Grazia



PROFILE

1.7M

personal income



MEDIA DRIVERS



MILLENNIALS THE INFLUENCERS

PASSIONS

the arts celebrity finance
fashion & beauty news & current affairs



255 ↑ I'm usually first to know what's going on with friends*

251 ↑ Keep up to date with latest fashions*

237 ↑ I like to stand out in a crowd*

212 ↑ I like to go to trendy places to eat and drink*

135 ↑ I write/publish a blog*

THINK: INFLUENTIAL TREND SETTERS

Fashionable, trendy, creative types at the top of the social pyramid. They lead the scene and are the first to know and the first to tweet about it. They share and others follow. Heavy media users that ensure they know what's going on. They embrace life, aim to be the best and like to stand out.

BAUER MEDIA BRANDS



HIGHEST MEDIA CONSUMPTION





THE ADOPTERS



INTRODUCING THE ADOPTERS



SOCIAL MEDIA PROS

Above average media consumption of 65 hours per week

Particularly prolific on social media

SEEK VALIDATION & RESPECT

Seek knowledge that sets them apart

Use their appearance and style to stand out

KEY DRIVERS:

Social image

Self esteem

CAREFUL CRAFTING OF THEIR ONLINE PERSONAS

All segments are hyper aware of their online presence but The Adopters in particular take great care to fine tune their online personas

FILTER THEIR SOCIAL MEDIA POSTS

- Avoid being seen as unfunny, boring, annoying
- Leave positive digital footprint

PREFER POSTING PICTURES TO TEXT

- Text is much harder to get right

SEEK POSITIVE FEEDBACK ONLINE

- Getting a positive comment is an ego boost
- Getting no reaction demands remedial action

PROFILE

4.5M

personal income



male female



younger older

MEDIA DRIVERS



social image



self esteem

MILLENNIALS THE ADOPTERS



THINK: ON TREND SOCIAL BUTTERFLIES

Stylish mainstream; they look good but aren't total fashionistas. All over social media - consuming content, keeping on trend, staying up to date and sharing their experiences. Discovering new trends, music and fashion; they seek knowledge as a social currency. They are ambitious and want to push themselves.

153↑ I keep up with latest fashions*

152↑ I'm usually the first to know what's going on*

137↑ It's important my home is equipped with the latest tech*

126↑ I want to get to the very top in my career*

115↑ It's important to be well informed about things*

BAUER MEDIA BRANDS



REACH THEM:



SOCIAL MEDIA PROS

BRANDS



MEDIA





THE APPRENTICES



INTRODUCING THE APPRENTICES



MAKING BIG LIFE CHANGES

Inward focus

Concentrating more on reaching their goals and less on following trends

ALL ABOUT ONLINE

Used socially

Also a crucial tool in helping them reach their goals

KEY DRIVERS:

Self progression

Pursuing passions

ONLINE MOST USED BUT DOUBLE EDGED

PROS

Social media

Self-progression

Social currency

Entertainment

Utility

CONS

Time waster

Impact on real world relationships

Self-absorbed

Screen fatigue

PROFILE

1.8M

personal income



MEDIA DRIVERS



MILLENNIALS THE APPRENTICES



THINK: STARTING OUT

Just starting out in the big wide world. They're not satisfied with their current lives but are very ambitious, focused on career progression and improving themselves. They consume media with purpose to enhance their knowledge. They are thrifty and seek value for money.

- 152** ↑ I want to get to the very top in my career*
- 124** ↑ I wear anything, I don't worry much about it*
- 113** ↑ It's important to be well informed about things*
- 112** ↑ You should seize opportunities in life when they arise*
- 25** ↓ I am very happy with life as it is*

BAUER MEDIA BRANDS



REACH THEM:



ALL ABOUT ONLINE

BRANDS



MEDIA



* Indexed against all GB 16-34 year olds



THE ENTERTAINED



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INTRODUCING THE ENTERTAINED



MEDIA NEEDS TO COMPETE FOR THEIR TIME

Busy lives leave less
time for media

Consume 63 hours
per week on average

WANT TO BE ENTERTAINED

Entertaining content
prioritised over news

Celebrity and real-
life content are key

KEY DRIVERS:

Entertainment

Community

MEDIA USED PRIMARILY FOR ENTERTAINMENT



EVENT TV HAS A BIG ENTERTAINMENT FACTOR

- Watch live to avoid spoilers
- View 'socially'

"Watching programmes live is important to me because I like to be up to date with them at the same time as everyone else – spoilers are a nightmare as well"

Beth 17, Kerrang!



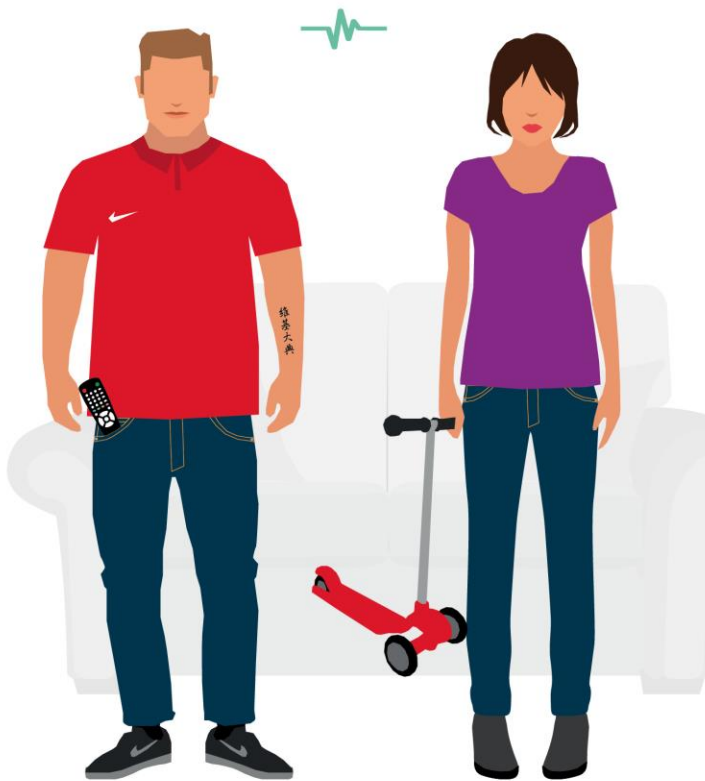
USE RADIO AS A MOOD CHANGER

- Used to give them energy and motivation when they need it

"I sometimes use radio to pick me up – my mood can come up or go down depending on what I'm listening to"

Simon 27, FHM

MILLENNIALS THE ENTERTAINED



PROFILE
5.0M

personal income
£££££

male female

younger older

MEDIA DRIVERS



entertainment



community

THINK: FAMILIES WITH KIDS

Take life as it comes, stick to what they know and seek reassurance before trying new things. They use media for entertainment but can sometimes feel swamped. They are less reliant on media generally and do less online – particularly social media – preferring to simply spend time with family and friends.

BAUER MEDIA BRANDS

Magic Closer
EMPIRE the hits radio heat

REACH THEM:



MEDIA NEEDS TO ENTERTAIN

138 ↑

Check out new TV/Films/Books/Bands after family/friends have*

129 ↑

Wait for friends/family to try it before trying something new*

61 ↓

Constantly checking social media to keep up to date with the world*

61 ↓

Love having new and original experiences*

51 ↓

Important to be well informed about things*

BRANDS

Johnson's baby
Vaseline. adidas
Boots AVON

MEDIA

SUNDAY Mirror
MyVoucherCodes
MailOnline Femal
food network
sky/MOVIES



THE CONTENTED



INTRODUCING THE CONTENTED



HAPPY WITH THEIR LIVES AS THEY ARE

Not pushing themselves too hard in their careers

Don't feel the need to keep up with trends

BIG USERS OF ON DEMAND

Love creating their own TV schedules

Pick and choose their trusted favourites

KEY DRIVERS:

Functionality

Entertainment

APPRECIATE CURRENT STANDING



VALUE TIME SPENT WITH LOVED ONES OVER MONEY/CAREER

- 82% agree 'My family is more important to me than my career'
- 68% agree 'How I spend my time is more important than the money I make'



LESS LIKELY TO EMBRACE PROGRESSION OR CHANGE

"I dislike change – it makes me feel very uneasy"

TabithaP, 19, Kerrang!

"For work – I don't use my intellect or education as much as I should"

Lewis, 32, FHM

PROFILE

2.7M

personal income



MEDIA DRIVERS



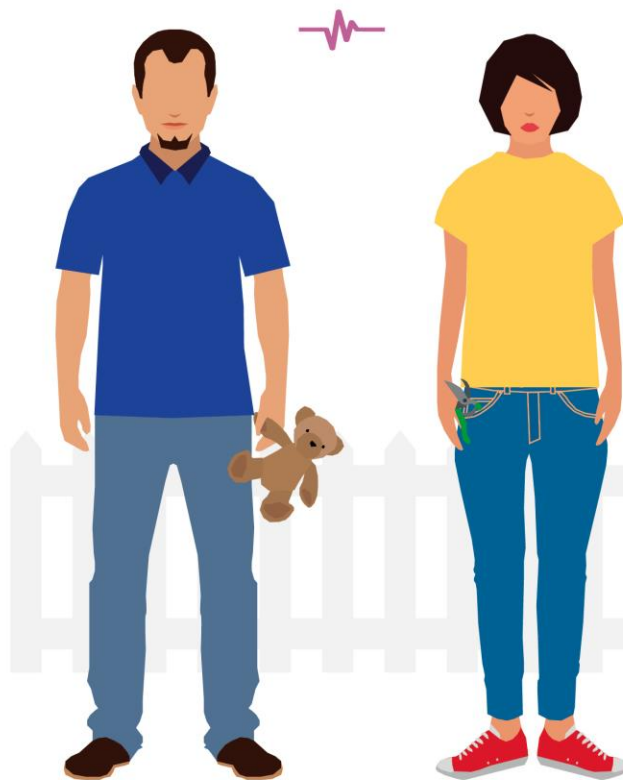
functionality



entertainment

MILLENNIALS

THE CONTENTED



THINK: HAPPY AT HOME

Our oldest group, they are family first, career second (or third). More rural and not so trendy, happy to go along and do their own thing rather than stay up to date with the latest trends. They are happy with their lives and want stability. They love a boxset, pizza and glass of wine.

- 118** ↑ My family is more important to me than my career*
- 116** ↑ I am very happy with life as it is*
- 115** ↑ My favourite pastime is being at home*
- 109** ↑ In a job, security is more important than money*
- 49** ↓ I like to stand out in a crowd*

BAUER MEDIABRANDS



REACH THEM:



BIG USERS OF ON DEMAND

BRANDS



MEDIA



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COMMUNICATING TO THE SEGMENTS

THE INFLUENCERS

- Actively engage with advertising
- Want to hear about the most exciting new products/brands

THE ADOPTERS

- Highly open to ads/sponsorship
- Want to feel/demonstrate they're informed

THE APPRENTICES

- Fairly receptive to brands
- Seek either high value for money or aspiration

THE ENTERTAINED

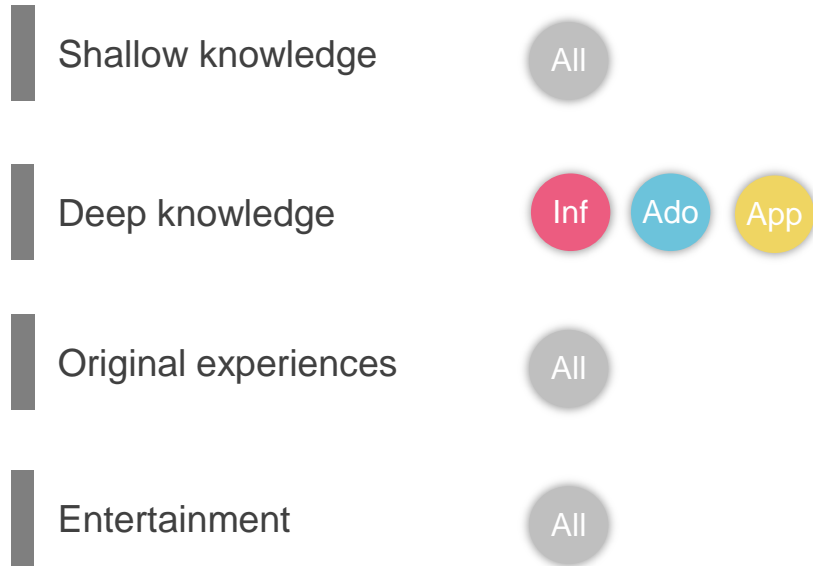
- Receptive to ads/comms on their terms
- Seek humour and reject comms that disturb their experience/mood

THE CONTENTED

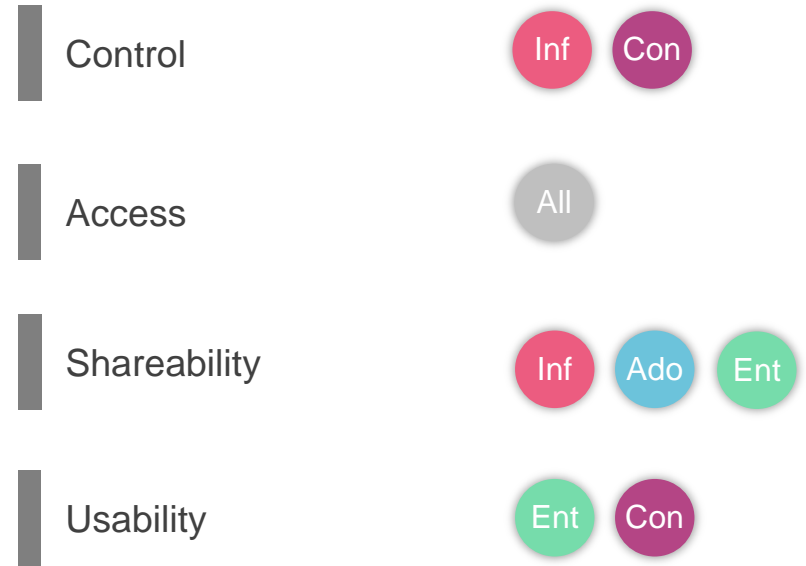
- Quick to switch off from advertising
- Seek unadorned facts

NEEDS ARE NUANCED BY SEGMENT

GIVE MILLENNIALS WHAT THEY WANT...

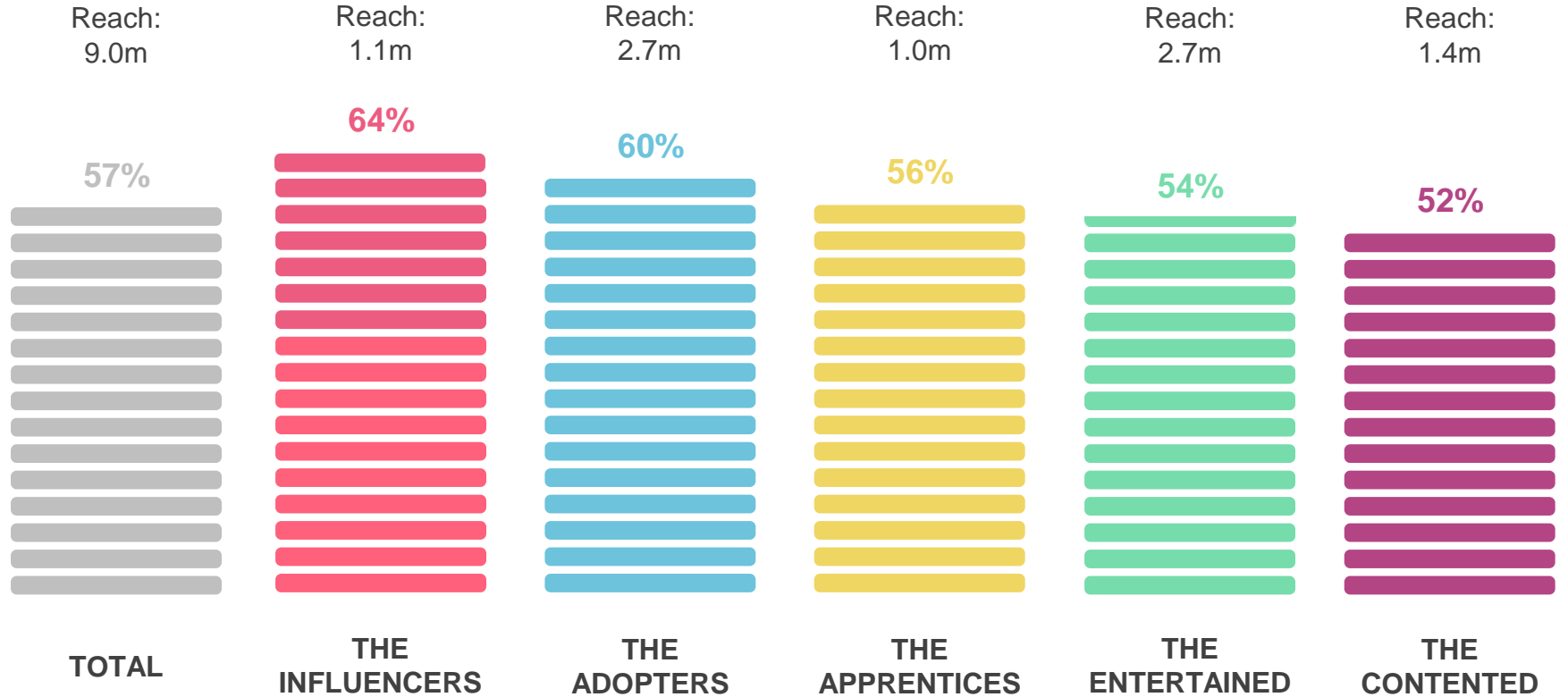


HELP THEM MAKE THE MOST OUT OF IT...



CLEAR PURPOSE – STAND FOR SOMETHING

BAUER REACH BY SEGMENT



CORE CONCLUSIONS & BRAND IMPLICATIONS

INSIGHT

Millennials' hyper-connected world is pressure-packed



They are expert knowledge gatherers



Experience is their new status symbol



BRAND IMPLICATIONS

Relief is demanded
ENTERTAIN & INSPIRE

In the know is imperative
WHEREVER, WHENEVER

Help empower
TO DO, FEEL AND SHARE



BAUER KNOWLEDGE

THE MILLENNIALS CHAPTER



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