

Millennials

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

BACKGROUND

Bauer Knowledge: The Millennial Chapter, is the first in a series of in-depth studies into key audiences.

Millennials are a highly-valued audience, making up one in four adults in the UK and forecast to number 17m in 2019.

The study investigated the pressures, passions and motivations that drives this audience by allowing them to create their own hierarchy of needs using Maslow's hierarchy as a framework.

It questioned more than 3,000 millennials, asking them to review adverts and media brands, keep diaries of the media they used, and write passionate 'love letters' to their favourite media brands. The 50+ tasks set on the hub delivered 1000's of posts from which to draw out insights.

It reveals that experience is the most valued status symbol for the UK's millennials. It also found that millennials seek meaningful experiences in both work and life but some struggle to achieve the balance they want.



KEY FINDINGS

- The two core pressures impacting on Millennials are the post-recession economy and the always on culture of our digital world
- Millennials hyper connected world is pressure packed and they need relief, magazine media can provide a welcome retreat of media mindfulness
- Experience is the new status symbol and trumps ownership. 74% of millennials agree that they 'enjoy the shared experience of events', 77% agreed they 'love having new and original experiences'.
- Millennials are expert knowledge gatherers, giving them access to those in the know is an imperative; consider the role of specialist editorial teams at magazine brands as part of your campaign solution
- Five attitudinal Millennial segments were identified: The influencers, The adopters, The apprentices, The entertained, The contented. A handy infographic snapshot of demographic, attitudes, brands and media preferences is available for each

METHODOLOGY

1

Kick-off with Bauer's Millennials

2

Segmenting the audience attitudinally

3

The Hub: Millennial Community

4

Sizing community behaviours



RESULTS

1. Two core pressures are impacting Millennials



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'

2. Millennials are expert knowledge gatherers

Immersion in digital leads to two types of knowledge as currency:

1. Shallow/general knowledge helps them keep up and fit in
2. Deep/niche knowledge helps them progress, stand out and bond with kindred spirits

3. 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'

4. Sharing drives proliferation

LEARN/DO

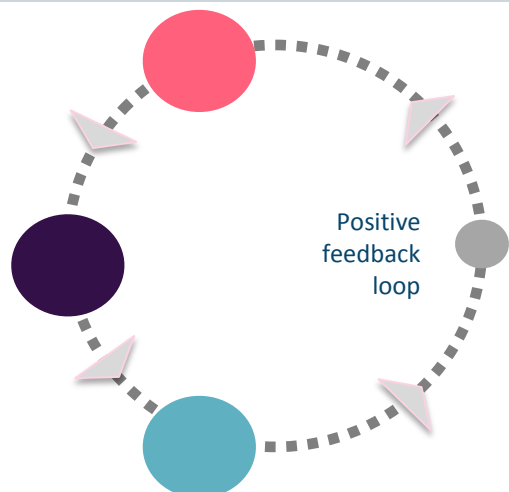
Glean a great snippet of info or do something original

VIEW

Seeing what others are doing inspires/urges the observer to learn/do more

SHARE

Showcase what you've done or learnt via social media



4. Five segments identified

THE INFLUENCERS



1.7m

- High media usage
- More likely to be male

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

THE ADOPTERS



4.5m

- High media usage
- More likely to be ABC1

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

THE APPRENTICES



1.8m

- Younger
- More likely to live in London

Focused on self progression rather than keeping up with trends

THE ENTERTAINED



5.0m

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

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

THE CONTENTED



2.7m

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

Satisfied with life and don't chase the latest trends

5. 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).



6. Motivations driving segments

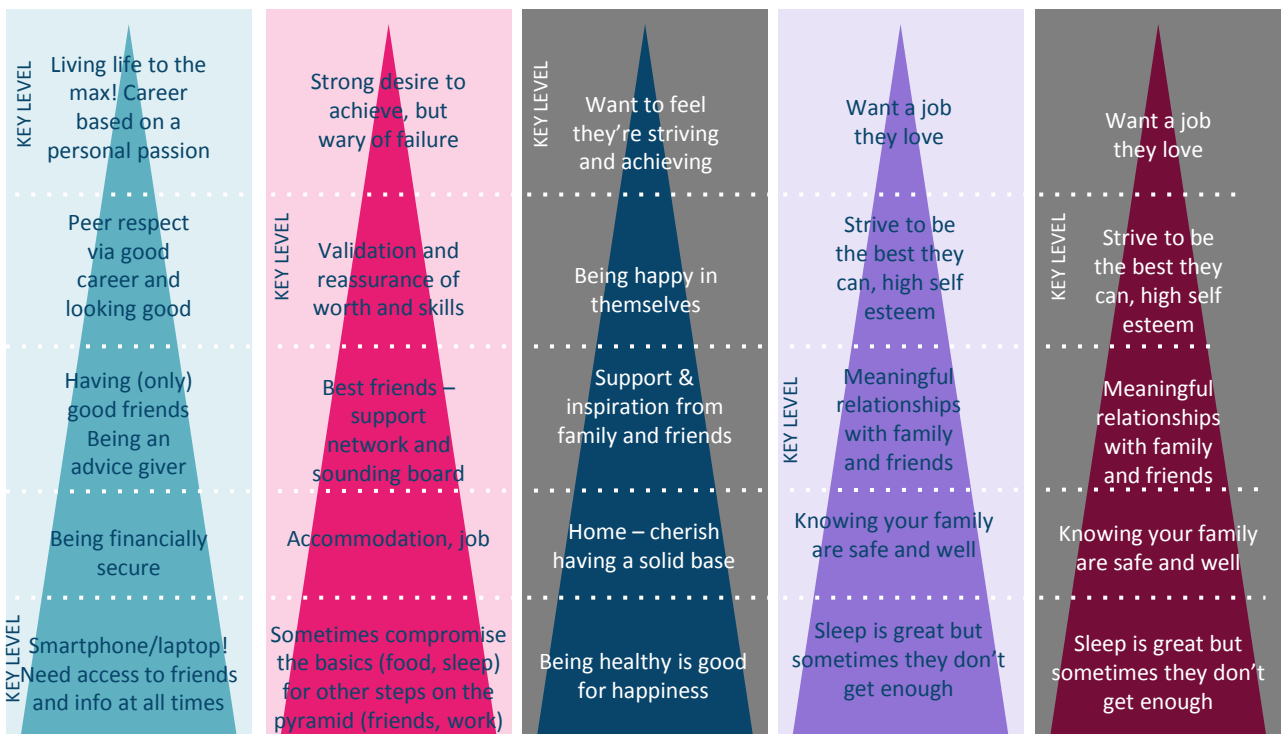
THE INFLUENCERS

THE ADOPTERS

THE APPRENTICES

THE ENTERTAINED

THE CONTENTED



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

PROFILE

1.7M

Personal Income

£££££



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'

PASSIONS



Fashion & Beauty



The Arts



Finance



Celebrity

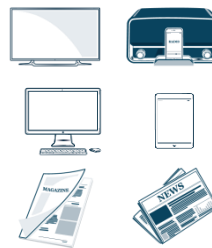


News & Current Affairs

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.

REACH THEM:



BAUER MEDIA BRANDS



BRANDS



MEDIA

EveningStandard.



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

PROFILE

4.5M

Personal Income

£££££



153



'I keep up with the 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'

PASSIONS



Fashion & Beauty



Music



Travel



Home, Garden & Lifestyle



News & Current Affairs

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 social currency. They are ambitious and want to push themselves.

REACH THEM:



Bauer Media Brands



BRANDS



MEDIA



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

PROFILE

1.8M

Personal Income
£££££

Male Female

Younger Older

152	↑	'I want to get to the very top of 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 my life as it is'

PASSIONS

Films

The Arts

Music

Television

News & Current Affairs

Think: Standing 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.

REACH THEM:

BAUER MEDIA BRANDS

MUSIC

heat

KERRANG!

BAUERCITY

KISS

BRANDS

SAMSUNG

ASDA

TESCO

PRIMARK®

MEDIA

Discovery CHANNEL

NETFLIX

Money Super Market.com

BBC iPlayer

totalJobs.com

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

PROFILE

5.0M

Personal Income
£££££

Male Female

Younger Older

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'

PASSIONS

Films

Sports

Travel

Television

Home, Garden & Lifestyle

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

REACH THEM:

BAUER MEDIA BRANDS

closer

heat

EMPIRE

the hits radio

magic

BRANDS

Johnson's baby

Vaseline

AVON

Boots

adidas

MEDIA

sky MOVIES

food network

MyVoucherCodes

MailOnline

SUNDAY Mirror

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

PROFILE

.....

2.7M

.....

Personal Income

£££££

.....

♂ Male ♂ Female

.....

🏃 Younger 🚶 Older

118	↑	'My family is more important than my career'
116	↑	'I am very happy with my life as it is'
115	↑	'My very 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'

PASSIONS

Films

Music

The Arts

Home, Garden & Lifestyle

Food

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 box set, pizza and a glass of wine.

REACH THEM:

Bauer Media Brands

Closer **BAUERCITY**

Absolute Radio **magic**

BRANDS

MATALAN

next

M Pampers

MORRISONS

RYANAIR

MEDIA

sky LIVING

Disney Junior

Dave

GOLD

BBC RADIO 4

6. Communicating with 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

SUMMARY

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