

CARAT

Designing for People



Gen Y in view

a dentsu company





At Carat we believe that the world would be a better place if all relationships had more empathy.

In media this means designing connections that earn people's attention by creating value in their lives.

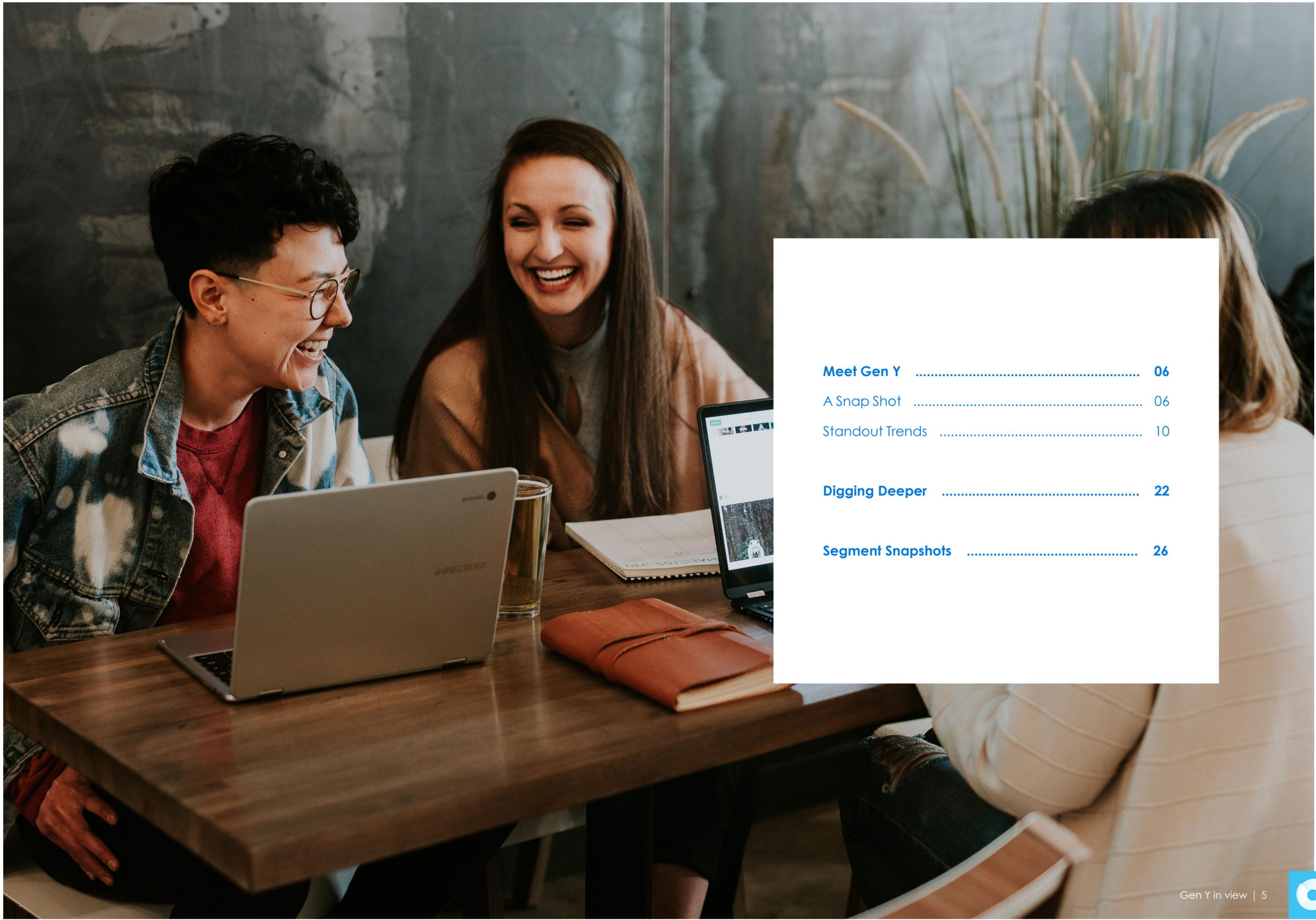
To do this we put an understanding of people at the heart of everything we do.

We call this Designing For People.

In this report you will get a taste of how Carat goes beyond surface level 'consumer' and 'demographic' traits and into profiling the rich attitudinal and behavioural cohorts of people that exist within generations.

It's this depth of understanding that enables us to unlock the value exchange upon which sharper connections between people and brands are built.





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Meet Gen Y

Often referred to as Millennials, they are now aged between 24-39, having been born between 1982-1996.

Having lived through two economic recessions, a housing affordability crisis, and now a global pandemic, it's no wonder they've been called other names such as;

- The Recessionals
- The Delayed Generation
- The Resilient Generation, and
- Generation Rent

But tough times breed strong resilience, and within this generation are people like Whitney Wolfe-Herd, Bumble CEO and Founder, and the world's youngest self-made female billionaire.

Looking more locally, Nick Molnar, co-founder of Afterpay, became Australia's youngest self-made billionaire during 2020 at just 30 years old.

Whatever you call Gen Y, they've grown up into fully fledged adults, bucking the sweeping generalisations of the past.



The events that have shaped this generation

Truly understanding a generation means understanding the events, both global and local, that have shaped the world they've grown up in.

The defining moments that Gen Y identify as shaping their lives are dominated by a mix positive and negative events, across progressive politics and threats of terrorism, with a sprinkling of technological advancements.

The key events;

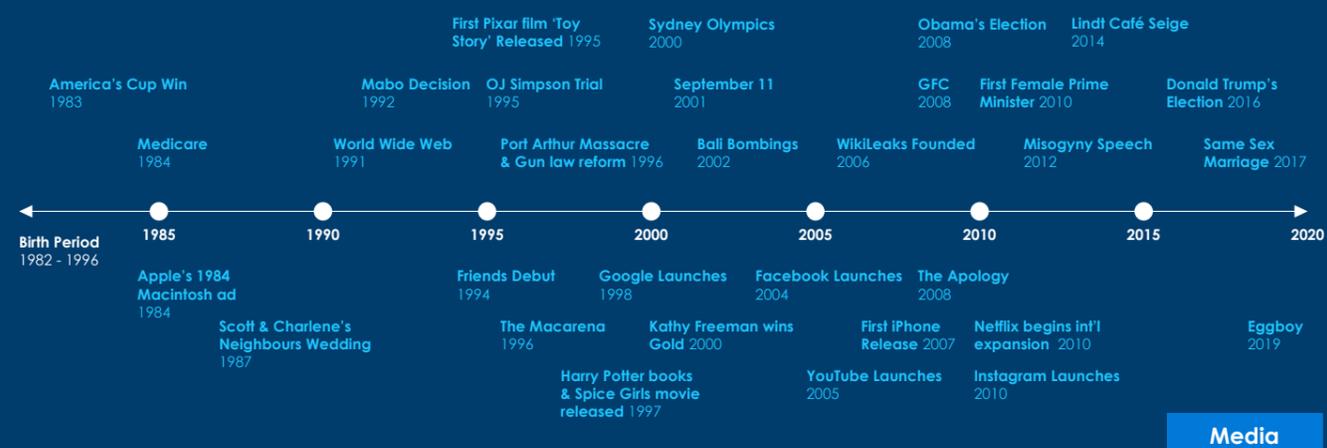
- Progressive Politics: Same-sex marriage, The Apology, the first female PM and gun law reform
- Threats of terrorism: September 11, the Port Arthur massacre, the Bali bombings and the Lindt Café siege
- The birth of the internet/WWW

Some of these key moments live on in Gen Y minds long after they've taken place, including Julia Gillard's misogyny speech in 2012 that was recently included in Triple J's 'Requestival' line-up, showing it still resonates with them a decade on.

The lives of Gen Y have straddled both analogue and digital worlds, witnessing technological advancements such as the first iPhone and the birth of Facebook, Instagram and Netflix.

They've even grown up during some of the biggest global pop-culture franchises, including Harry Potter, The Lord of the Rings, Friends, Toy Story and the Spice Girls.

Timeline of events shaping Gen Y



Gen Y name the most significant historic events of their lifetime

Source: Sources: Social Research Centre: ANU "The Life in Australia Historic Events Survey" 2017 | McCrindle Generations Defined Sociologically

	Event	%
1	Same-Sex Marriage	42
2	September 11	36
3	The Apology	16
4	2000 Sydney Olympics	14
5	Port Arthur Massacre	13
6	Global Financial Crisis	12
7	Bali Bombings	10
8	First Female PM	10
9	Lindt Café Siege	9
10	Donald Trump's Election	8
11	Gun Law Reform	8
12	The Internet / WWW	8



Framing our view on Gen Y

Taking a broad look at Gen Y, this cohort covers many diverse life stages from young singles through to married couples with school-aged children.

In this report, our aim was to take a deeper look at this complex generation to better understand them on a human level, and better understand how we, and you, can market to them with impact.

As a starting point, we delved into the minds of Gen Y by reviewing local and global trends research, identifying key themes and behaviours relevant to marketers. Then, to closely examine Aussie Gen Y, we leveraged our owned consumer connections system, or CCS.

CCS is the world's largest single source consumer survey, available in 65 countries including Australia.

We were the first agency group globally to invest in this type of panel data and we've been investing annually every year for over 20 years.

This custom database provides us at dentsu with unique consumer insights and the ability to perform in depth consumer segmentation.

Using CCS, we were able to segment Gen Y aged 24-39 into five key typologies, uncovering and examining in detail across all subsets and how we as marketers can connect with them.

The Basics

- Male : Female 50:50** ix102:98
- Live with partner + kids 31%** ix93
- University Educated 49%** ix130
- Married or De Facto 52%** ix89
- Employed Full-Time 55%** ix127
- Speak language other than English 35%** ix149
- Queer: Gay/lesbian + bisexual ix153 + ix140**
- Metro: Regional 72% ix109: 28% ix83**

Attitudes & Interests

Focused: 'My career is very important to me' 63% ix132

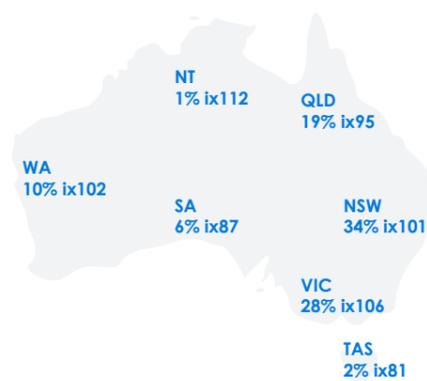
Carefree: 'I believe in taking risks' 53% ix126

Driven: 'Success is important to me' 68% ix124

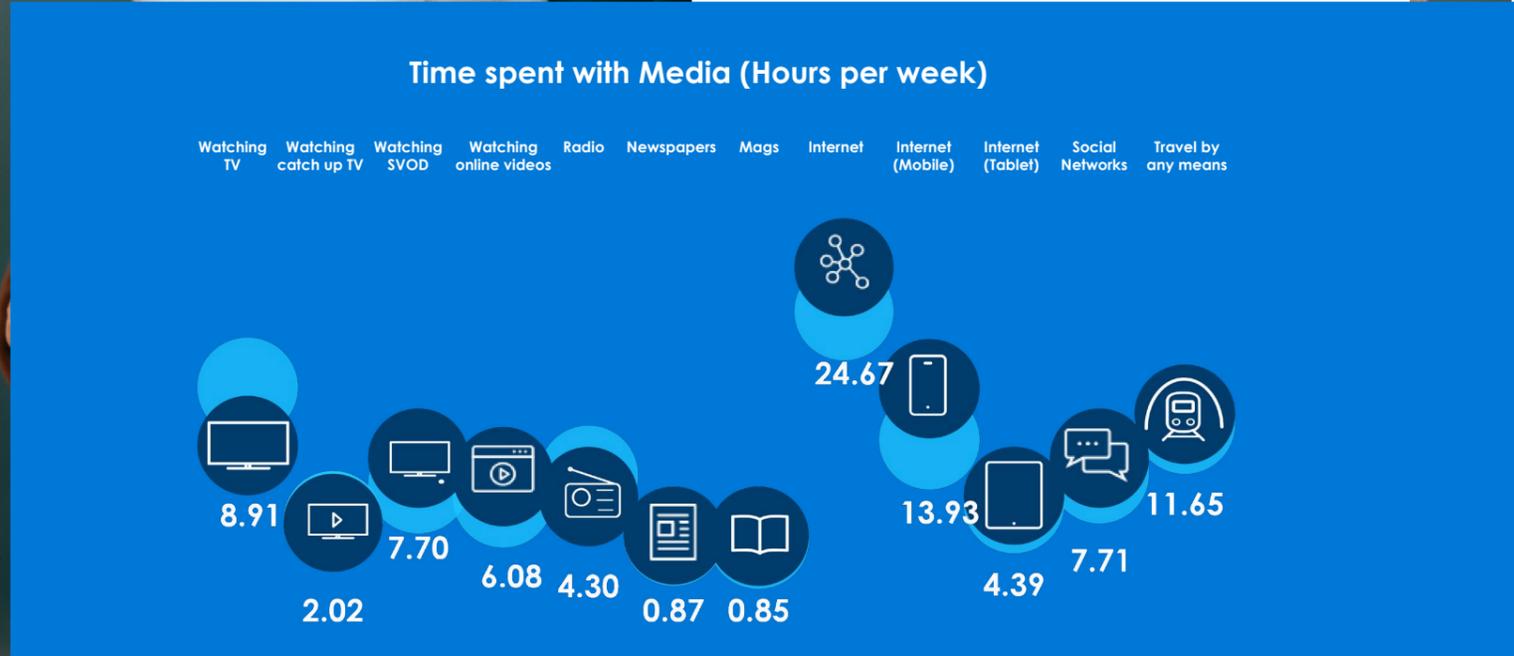
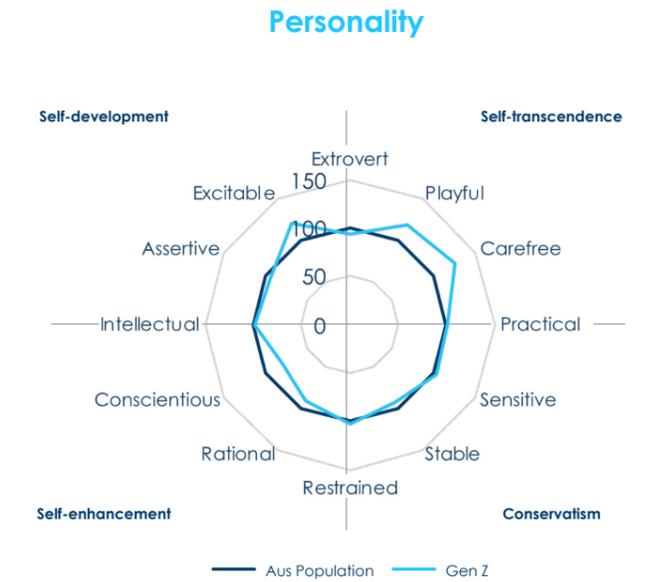
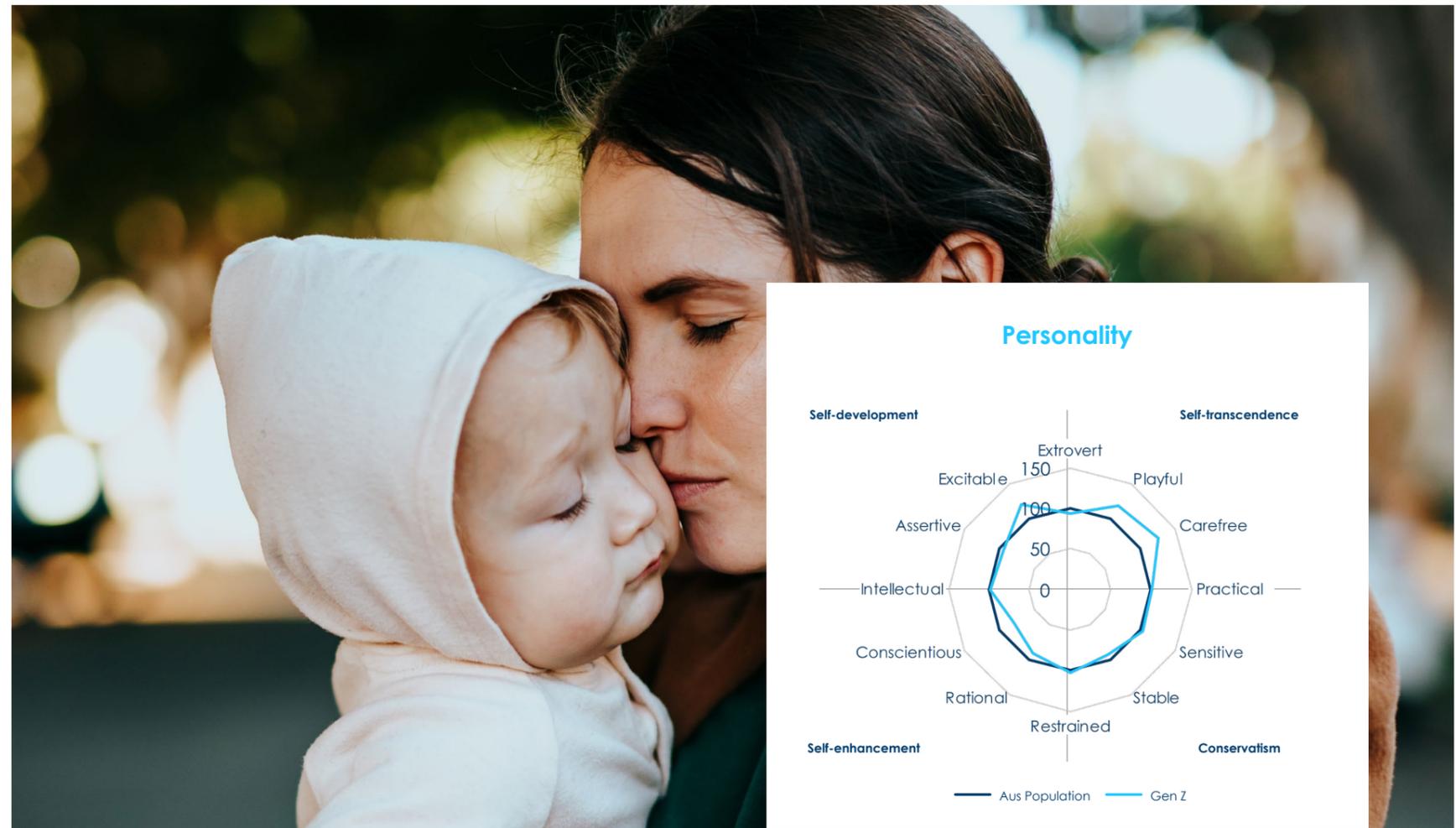
Stylish: 'International brands have status' 43% ix130

Impressionable: 'I trust brands/products endorsed by a professional' 44% ix136

Social: 'I do a lot of entertaining at home' 44% ix135



Source: iCCS June 2020 | Gen Y (born 1982-1996) compared to general population



Key Trends: A generation that are all grown up!

Looking locally and globally for inspiration, we've identified four key trends that showcase how the old perceptions of this generation are outdated.

Firstly, they are moving major 'adulthood' milestones forward instead of backwards.

We've witnessed a fundamental shift in core values, attitudes and priorities for Gen Y, ignited by the COVID-19 pandemic.

Secondly, they feel caught in the middle.

The generational punching bag has been copping it from both sides across Baby Boomers and Gen Z.

Thirdly, they are finding new ways to beat burnout.

They continue to pioneer attention and education on health and wellbeing, for the benefit of all generations.

And finally, they are experiencing 'early onset nostalgia'.

In an unpredictable and gloomy world, they have found themselves looking to the past to escape to a safe place.

In the next section of this report, we'll go through each of these key trends in greater detail.



A complete reset

Deferring major milestones

Until recently, signifiers of success for Gen Y centred around travel, experiences, career, side hustles, and retiring early. This often resulting in deferring major 'adulthood' milestones such as marriage, having kids, starting a business or buying a home, when compared to previous generations.

Today, the **average age of a mother having her first child in Australia is 31.4**, compared with 26.8 in 1987, while the percentage of both parents working full-time with children under 5 is now 21% (up from 14% in 2009).

At a tipping point

However, this generation are at a tipping point. **They are getting older, with a median age of 31.5**, which means **their priorities are shifting** and most will be considering having a family if they haven't already got one! Reports suspect that the restrictions brought about by the global pandemic have also caused this generation to reconsider their priorities.

Caring for elderly parents and the option of multi-generational living has contributed to a shift in Gen Y mindset and priorities. **58% of Aussie Gen Y agree that "It is the responsibility of grown-up children to take care of their elderly parents"**, proportionately greater than both Gen X and Baby Boomers.

Avo toast & emoji battles

Caught in the middle

This is a generation who have seen their second major financial crisis in a lifetime.

Gen Y have been battling with Baby Boomers for years around housing affordability, wealth, climate change, and more recently access to COVID vaccines (OK, Boomer), but now they're also copping it from the other side.

Gen Z are forging ahead as the leaders of style, causes, and culture, which has left Gen Y struggling to keep up. From clashes over skinny jeans, side-parts and being 'cheugy', to the revelation that no-one uses the laughing emoji anymore, it's no wonder Gen Y are feeling increasingly detached from the generations around them!

This theme of disconnection for Gen Y also appears in more immediate surroundings, as they claim to be lonelier than those who've come before - **69% say they're even lonely in the workplace**.

Finding happiness

In spite of the doom and gloom, they are certainly proving to be a resilient bunch with Gen Y globally showing greater optimism year on year.

Instead of taking a negative stance, they are leaning into taking charge of the things they can control, including their careers, families and finances. They even have some energy left over to support those around them with almost **75% of Gen Y globally intending to take positive actions within their local communities**.



Beating burnout in the workplace

Pioneers of wellbeing

Gen Y were the first generation to take physical, mental and emotional health seriously, demanding more from employers and helping shift wellness into a status symbol.

As a generation that are going through fundamental lifestyle changes, the concept of wellbeing is having to continually evolve.

For much of their lives, work has been a means to early retirement, with **55% of Gen Y considering an early retirement as a sign of success**. However this drive has seen the generation burnout: with **73% clocking in 40+ hours per week**, they are working longer than any other generation.

The reality of 'burnout' has become so extreme, the World Health Organisation has now included the occupational phenomenon in their International Classification of Diseases in 2019.

The pandemic has only increased this desire to find balance at an everyday level; for many it has created an opening to completely redefine how they work.

Switching off

This constant connection and connectivity has resulted in Gen Y engaging in trends such as 'Niksen', the Dutch lifestyle concept of 'doing nothing', which has been proven to create increased productivity and mental alertness within workplaces. We are even seeing them pioneer solutions such as **'mini-retirements' (3-6 month breaks)**.

Early onset nostalgia

A call-back to simpler times

Never ones to shy away from their childhood memories, Gen Y experienced new levels of nostalgia in the past year. The emotional weight of COVID-19, combined with an over-supply of spare time, resulted in everyday escapism via 'early onset nostalgia'.

Streaming services allowed for many of the generation to break free from stress within a 'safe space', immersing themselves in simpler times with focus on the known, mundane, and the ability to revisit moments that sparked joy. Binge watching is now a standard viewing habit with **90% of US Millennials admitting to doing so**, and a further **38% admitting to bingeing once a week**.

Strangely enough, this type of sentimental longing has been proven to evoke optimism about the future.

Coming full circle

Local and global media companies are tapping into this trend, with initiatives such as Triple J's **'Requestival'** and Disney's **live action remakes** becoming annual pop culture staples.

A recent example is the original Space Jam website, which has been live since 1996. With the release of the recent Space Jam: A New Legacy movie, this old site has been incorporated into the online marketing of the film.

Gen Y are also increasingly sharing these movies, shows and soundtracks with their own children, deepening the nostalgia and creating longevity as these cultural icons get passed on.



Key trends: A mature consumer

As Gen Y has grown, so too have their bank accounts and families.

They now have serious spending power across all categories from home DIY to children's toys.

In the next section of this report, we will look at Gen Y as consumers, covering:

01. Ownership Acceptance

Their financial realisations leading to home ownership acceptance.

02. Future Families

Their modern vision of the Aussie family unit.

03. Rules of Engagement

And finally, ten rules of engagement for brands and marketers to follow for success.





01. Ownership Acceptance

Fiscal responsibility realised

Contrary to Boomer perceptions, Gen Y were financially savvy and responsible pre-pandemic.

Shifting savings goals

With lower wages and higher costs of living, even before the pandemic, Gen Y have had to be fiscally responsible. On average globally, they were saving or investing 40% of their wages, with three in four actively budgeting their money. According to Think with Google pre-pandemic, many of the generation were focused on saving for shorter-term lifestyle purchases, such as experiences and travel.

Shifting to 2021, job uncertainty and closed borders have reinforced Gen Y positive habits around finances, with many desiring longer-term security over instant gratification. According to Think with Google, **92% of young Aussies have done some activity to increase their financial knowledge**, and **56% of young Australian adults are now managing their money more carefully**.

Tech support

Gen Y are making the most of traditional and new channels to set them up for success. For example, we are increasingly seeing them turn to technology to help guide and support them, tapping into financial videos, investment apps such as Robinhood and Acorns, and finance podcasts including 'She's on the Money'.

The dream reignited

The COVID pandemic has reset the importance and focus Gen Y have placed on buying property.

Fuelling the fire

The value of home and land has been fully realised since lockdowns took place, with many of Gen Y being forced to convert their living spaces into gyms, offices and entertainment areas. Add to this the unfortunate reality that this generation were hit hard by COVID-19 induced job losses or reduced hours, moving back in with parents became necessary. McCrindle even coined a term for these people: **'KIPPERS'; Kids in parents' pockets eroding retirement savings**.

This has led to a swell in demand to get on the ladder amongst Gen Y at a time when the wider property market is becoming more competitive. In March 2021, Realestate.com.au reported a **97% YOY increase in 'For Sale' searches nationally**. However, with programs such as Super withdrawal and HomeBuilder coming into effect to finally provide more support to this generation, the dream could be closer than ever for some.

Diverging funds

COVID-19 has restricted freedoms, but for some who have remained in the workforce, led to increased savings! As well as being unable to spend big money on travel, gap years, entertainment and events, Gen Y are also rethinking spending large amounts on weddings, with overall marriage rates in Australia dropping 25% in the last 20 years and a high degree of uncertainty surrounding wedding planning in view of the ongoing threat of snap lock downs.

Sources: McCrindle, Deloitte, WSGN, Think with Google, REA,ABC 'Australia Talks' national survey



02. Future Families

Forging their own path

Gen Y are questioning outdated expectations of marriage and children

Fewer children, later, and not for everyone

Australia's total fertility rate reached an all time low in 2019 with an average of 1.66 babies per female, and has been 'below replacement' since 1976. Add to this the fact that 2 in 3 Aussies don't think that 'having children is necessary to find fulfillment in life', a sentiment that sits even higher for females, with 80% of those 18-29 disagreeing with the statement.

Contributing to this sentiment are considerations such as the impact on having children on lifestyle, climate change, careers and earning potential. An average 25-year-old woman who has children can expect to earn around \$1 million less over her lifetime, compared with a woman without children.

With increased chances of conception in later life, as well as a wider variety of ways to become a parent, Gen Y are redefining their family units in both age and diversity.

An outdated institution

Gen Y are not feeling pressured to consider weddings as religious ceremonies, with civil celebrants now taking over from ministers of religion as the primary conductors of wedding ceremonies.

Many Aussies are even questioning the notion of marriage entirely. Women are leading this shift, with ABC's 'Australia Talks' survey asking Aussies 'Is marriage an outdated institution?', resulting in 43% of women aged 18-39 agreeing.

Sources: ABS, ABC 'Australia Talks' national survey, Grattan Institute





03. Rules of Engagement

1. Encourage resilience

Brands need to embody positivity and optimism. Give them the tools and inspiration to make their lives the best they can be.

2. Switch to reset mode

Remind them of their newly found good habits, and urge them to prioritise their goals.

3. Don't compare to other generations

They had enough of it and are moving on with their lives.

4. Champion balance

Help manage stress by creating opportunities for time-out and 'Niksen'

5. Lean into receptivity

Across multiple major categories, Gen Y are actively seeking out advertising messages and information from brands. These aren't just from 'fun' categories like Alcohol and Beauty, but also includes Finance, Telco and Utility categories. Children's products also index highly, with many of Gen Y excited to spoil their kids.

6. Don't assume they don't care

Gen Z tend to be perceived as 'owning' causes and purpose-led movements, however most of Gen Y are just as passionate about these societal, environmental and community causes. Gen Y have already fought back against wealth disparities, housing affordability, outdated institutions and other global causes are also in their line of sight. Consider how to talk to this passion within the context of their 'adulthood' lives.

7. Emotions matter

Knowing they are receptive to advertising is one thing, but ensuring your message cuts through is another: emotion is the major factor in their decision making, with Gen Y leaning less on a rational or factual approach to purchases.

8. Lead with influence

Gen Y are open to getting more intimate with brands and networks, engaging with content, talent and experiences over standard ad placements. Aligning with sport or major events cause this generation to view brands more favourably. Being a widely social generation, they take notice of reviews, sponsorships, integration and ratings within their favourite channels and programs. Trusted talent, hosts and celebrities also offer a sense of comfort and reliability for new products or brands.

9. Have one-to-one conversations

Gen Y are more receptive to one-to-one channels, where they feel like a part of the content, so consider how you speak differently to one Gen Y vs all of them. For example, podcasts, YouTube, gaming and any form of entertaining storytelling allow a more intimate conversation with your brand.

10. Say no to nuclear

Reflect today's diverse family structures in your marketing, ensuring not to only rely on outdated traditional nuclear family models.

Source: ICCS June 2020





Digging Deeper

Within Gen Y, we have identified 5 distinct typologies

Using our proprietary consumer connections system (CCS) we have uncovered four distinct people-based segments within Gen Y. CCS is a panel of 10,000 adult Australians that we survey each year to understand peoples thoughts, feelings and behaviours from a claimed standpoint. The datapoints we collect are fused with the Roy Morgan platinum data base which provides an unweighted sample of 45k people which we then weight to represent the entire adult population.



Suburban Sceptics
1,402,000

Value 

Influence 

Suburban Sceptics would prefer to focus inwardly than outwardly.

Sceptical | Homely | Conservative



Plant Powers
1,274,000

Value  

Influence 

Plant Powers are cultured, artistic and passionate about local and global causes.

Cultured | Passionate | Opinionated



Skinny Jeans
1,137,000

Value   

Influence   

Skinny Jeans hold the highest value and influence for brands. This cohort are stylish and up to date with trends before you've heard about them

Influential | Stylish | Savvy



Front Hustles
897,000

Value   

Influence  

Front Hustles have lots of cash to splash and love the more premium and luxurious things in life.

Premium | Ambitious | Informed



Community Spirits
882,000

Value  

Influence  

Community Spirits' communities, religious groups and families are the centres of their world

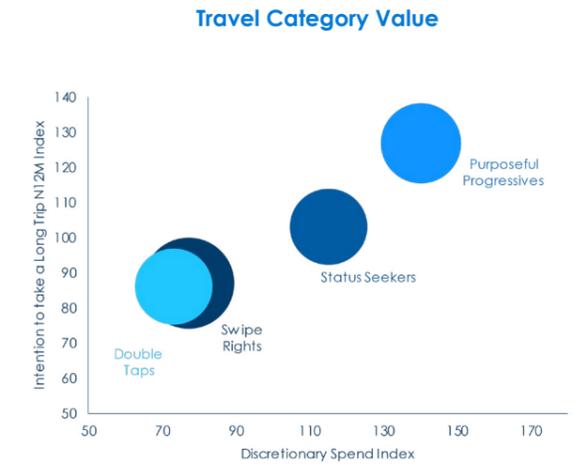
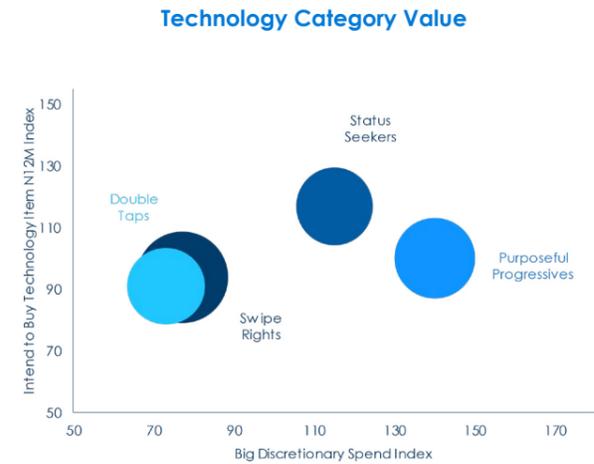
Community | Spiritual | Family

Skinny Jeans represent the strongest value potential for brands

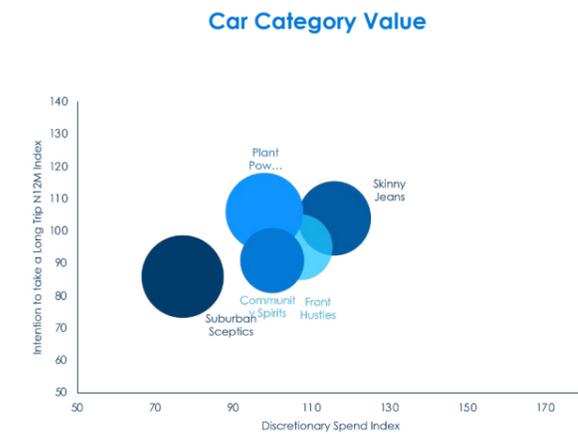
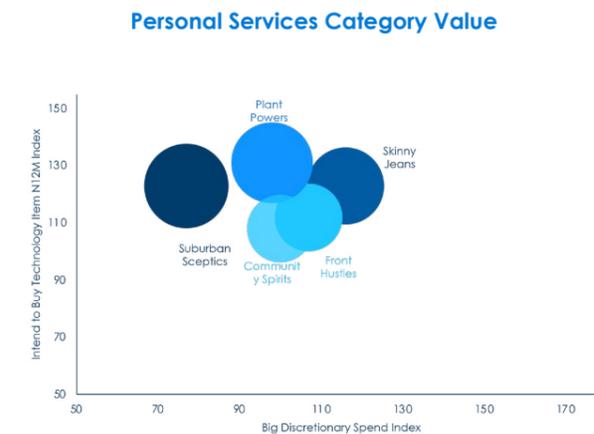
To understand which of these typologies presents the most valuable opportunity in market, we analysed how each segment indexed against various levels of discretionary spend.

Then, we mapped this data against their intent to purchase within four key categories: travel, automotive, personal services, and technology.

And, across the board, Skinny Jeans presented the strongest value potential for brands, with both the highest value and greatest propensity to convert. Conversely, Suburban Sceptics represented the least value for brands across these key categories.



Suburban Sceptics represents the least value for major brand categories



Source: ICCS June 2020 | Gen Y (born 1982-1996)

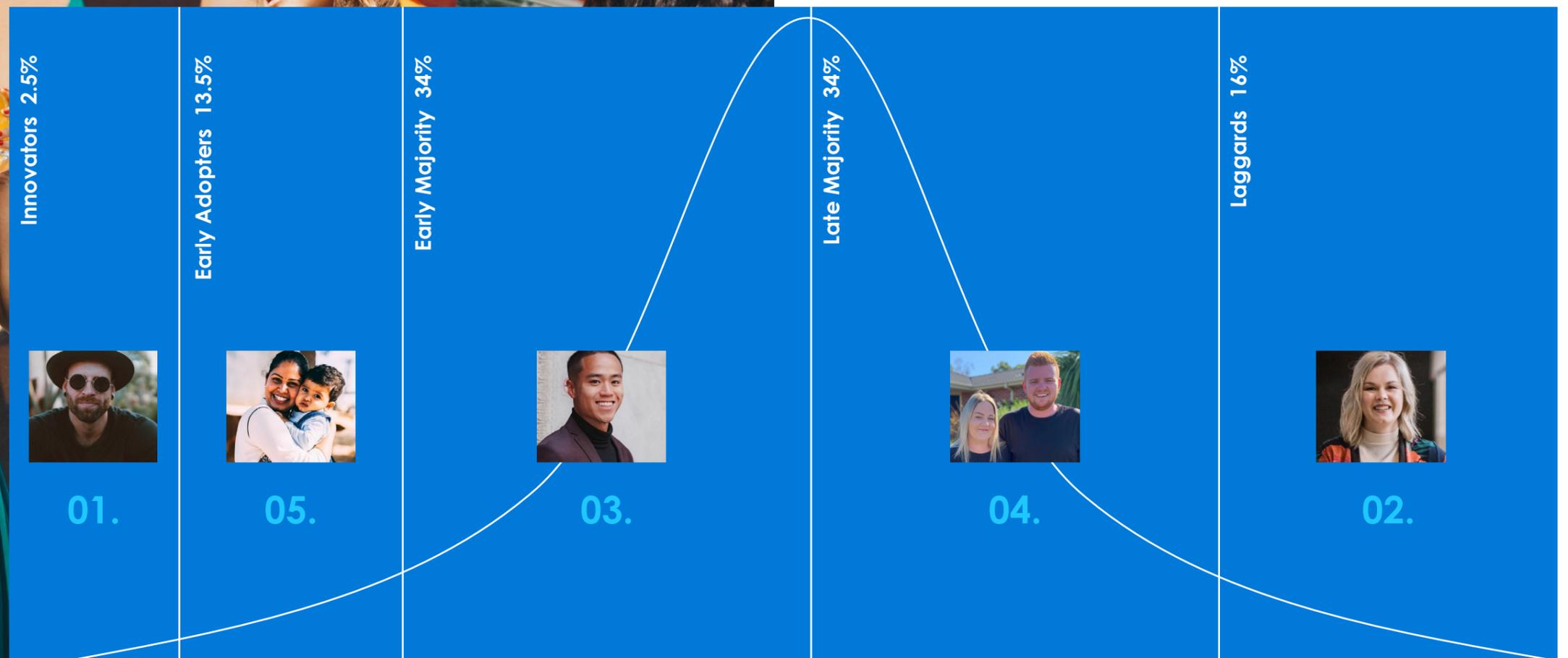




Skinny Jeans lead the pack not only in terms of spend, but also in their adoption rate of trends and influence

Our data demonstrated that the Skinny Jeans segment led the pack not only in terms of spend, but also in their adoption rates of trends, with Suburban Sceptics the least likely to adopt new trends.

Surprisingly, the Community Spirits are also early adopters, showing the influence they can have within their close communities.



Source: iCCS June 2020 | Gen Y (born 1982-1996)





Segment snapshots

Here we will take a closer look at all five segments and how brands can tap into the issues the care most about.



Skinny Jeans: the hard data

Who are they? Skinny Jeans hold significant value for spending power, covering a range of lifestyles and life stages, so don't assume they're all just DINKs.

They are excitable and social, and consume larger amounts of both newer and traditional media formats compared to the rest of Gen Y.

They are very focused on their appearances when it comes to clothing, make-up and using the coolest brands. This also extends to their kids, who are usually dressed in Instagram-worthy outfits too.

Finally, their passion for being stylish and leading the pack makes them trusting of advertising and influencers, making them much easier for brands to engage with.

The Basics

- Male** 64% ix127
- Live with partner and children** 36% ix116
- University educated** 51% ix104
- Married/De Facto** 52% ix101
- Employed Full-Time** 65% ix118
- Speak language other than English** 38% ix108
- Queer: Gay/lesbian** ix103
- Metro: Regional** 74% ix102: 26% ix94

Attitudes & Interests

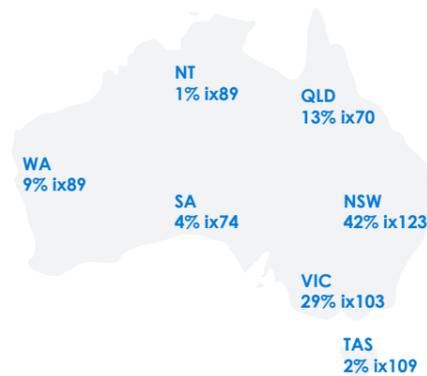
Appearance: 'I spend a lot of money on personal beauty/grooming products' 84% ix227

Spiritual: 'My religion plays an important part in my life' 80% ix235

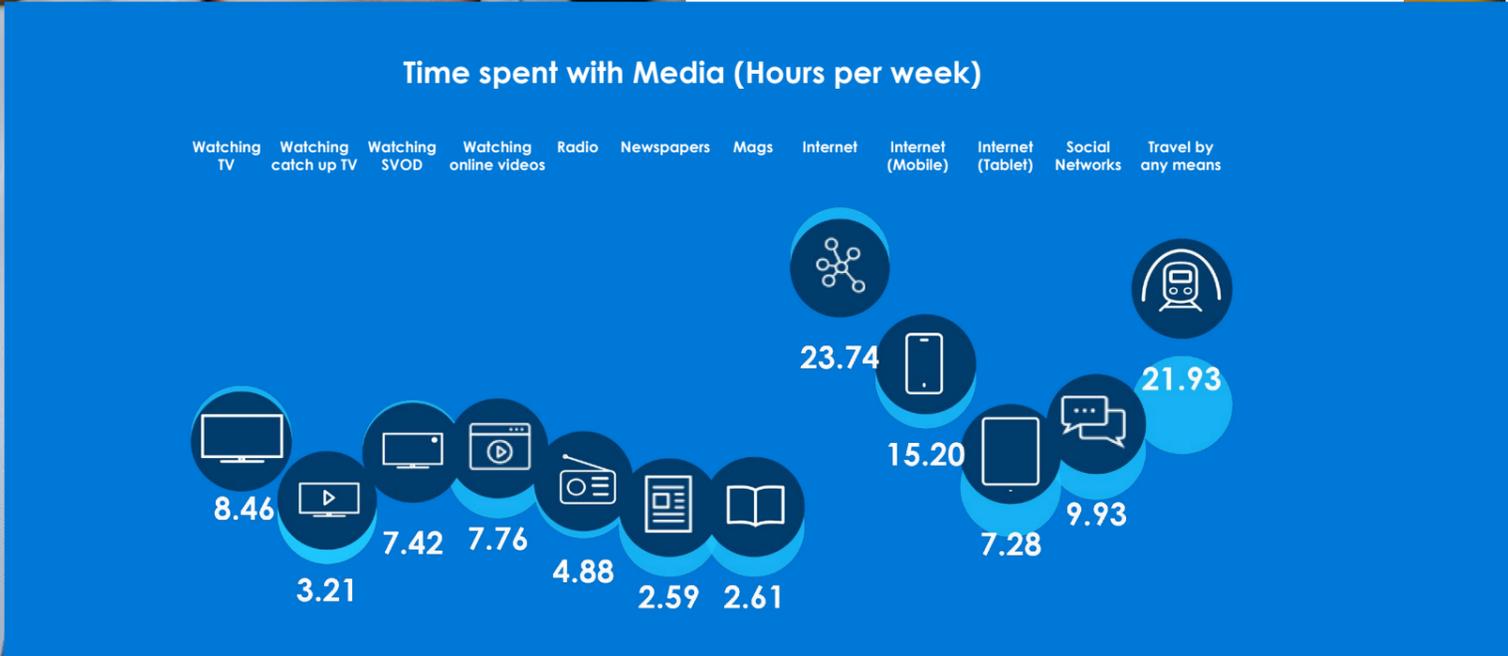
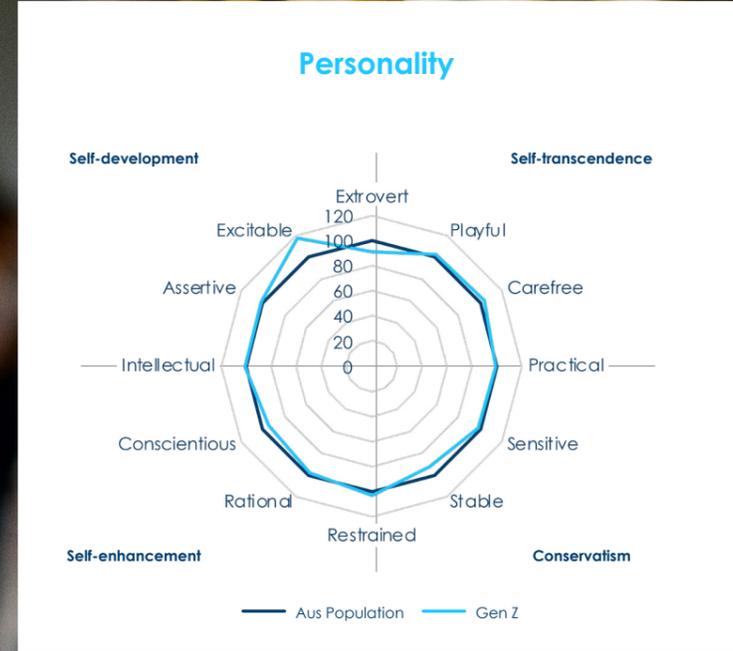
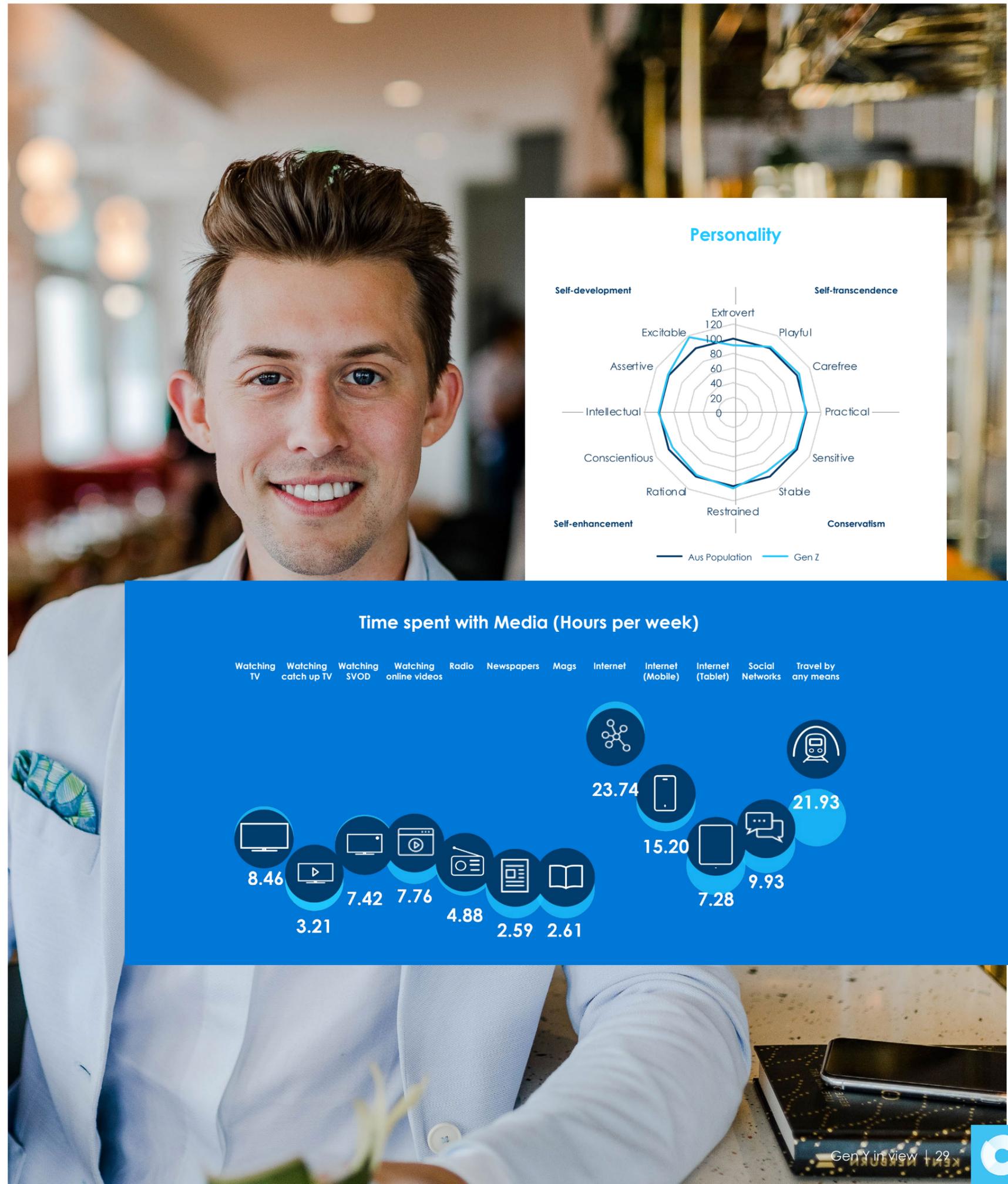
Trusting: 'I would be more likely to buy a product or service if a famous person I admire endorses it' 84% ix266

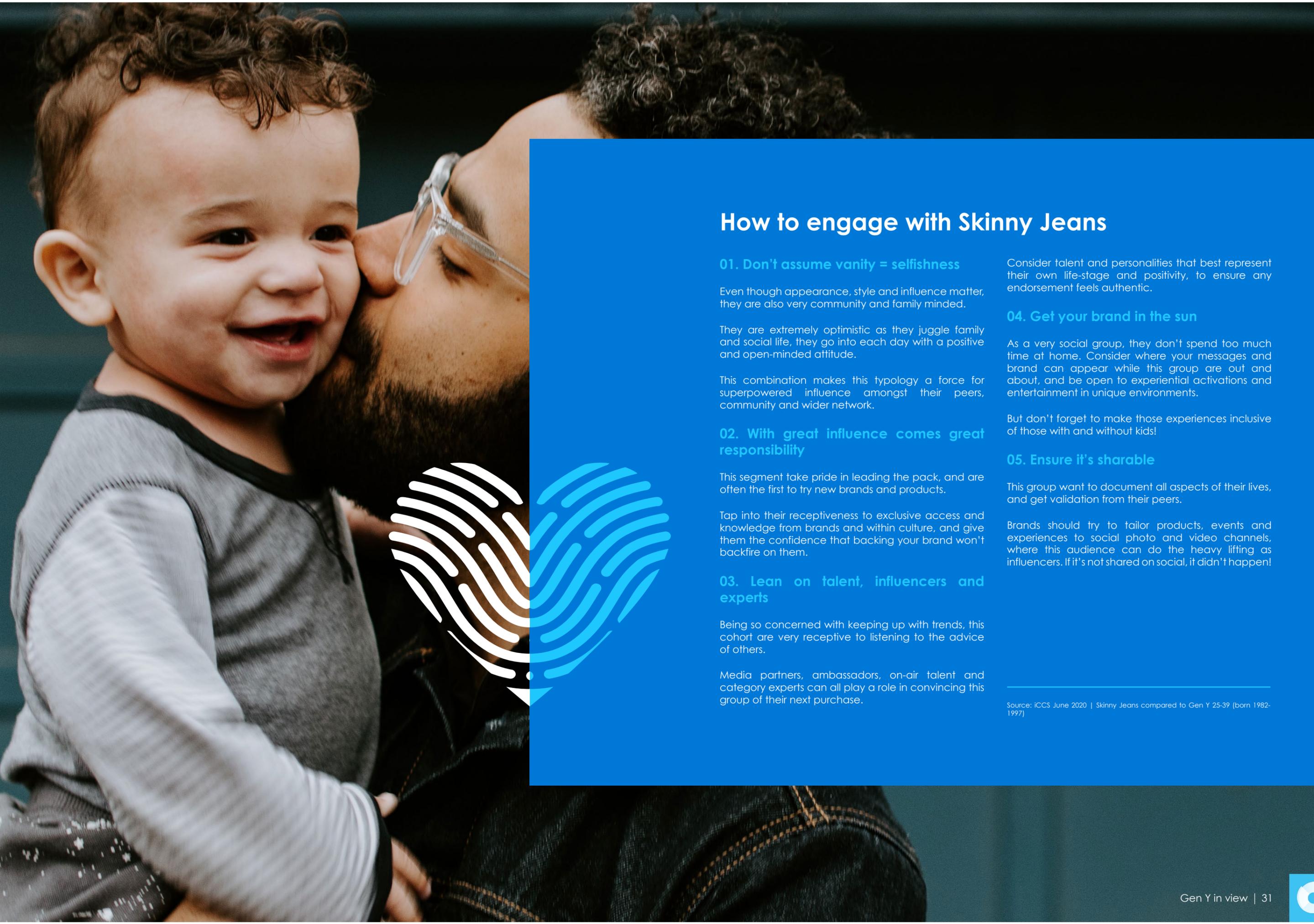
Social: 'I probably have more friends than most people' 70% ix251

Trendy: 'I buy the newest fashion brands and styles available' 78% ix250



Source: iCCS June 2020 | Gen Y (born 1982-1996) compared to general population





How to engage with Skinny Jeans

01. Don't assume vanity = selfishness

Even though appearance, style and influence matter, they are also very community and family minded.

They are extremely optimistic as they juggle family and social life, they go into each day with a positive and open-minded attitude.

This combination makes this typology a force for superpowered influence amongst their peers, community and wider network.

02. With great influence comes great responsibility

This segment take pride in leading the pack, and are often the first to try new brands and products.

Tap into their receptiveness to exclusive access and knowledge from brands and within culture, and give them the confidence that backing your brand won't backfire on them.

03. Lean on talent, influencers and experts

Being so concerned with keeping up with trends, this cohort are very receptive to listening to the advice of others.

Media partners, ambassadors, on-air talent and category experts can all play a role in convincing this group of their next purchase.

Consider talent and personalities that best represent their own life-stage and positivity, to ensure any endorsement feels authentic.

04. Get your brand in the sun

As a very social group, they don't spend too much time at home. Consider where your messages and brand can appear while this group are out and about, and be open to experiential activations and entertainment in unique environments.

But don't forget to make those experiences inclusive of those with and without kids!

05. Ensure it's sharable

This group want to document all aspects of their lives, and get validation from their peers.

Brands should try to tailor products, events and experiences to social photo and video channels, where this audience can do the heavy lifting as influencers. If it's not shared on social, it didn't happen!

Source: ICCS June 2020 | Skinny Jeans compared to Gen Y 25-39 (born 1982-1997)



Suburban Sceptics: the hard data

While Suburban Sceptics hold the lowest value and influence compared to other segments within Gen Y, there are many categories such as FMCG, Entertainment and Home DIY where they are highly engaged.

They tend to use more traditional media formats than other segments within Gen Y, and get out and about less often.

This group are highly sceptical of institutions such as businesses, government, and media.

With this more conservative view of the world, they don't keep up with trends, and don't care if they are seen as 'chuegy' or not.

They are more focused on their immediate local community and family than the wider world around them.

The Basics

Male
51% ix101

Live with partner and children
34% ix110

University educated
44% ix90

Single
40% ix103

Employed Full-Time
48% ix87

Speak language other than English
34% ix97

Queer: Gay/lesbian
ix122

Metro: Regional
68% ix95: 32% ix113

Attitudes & Interests

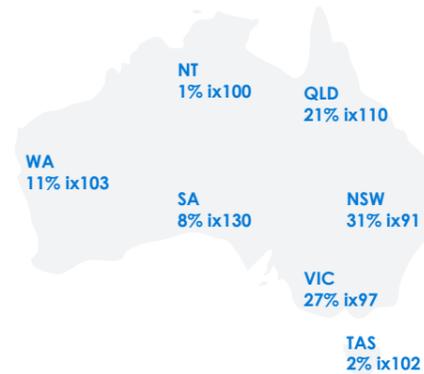
Sceptical: 'Threats to the environment are exaggerated' 27% ix 118

Conservative: 'There's too much change going on these days' 48% ix 114

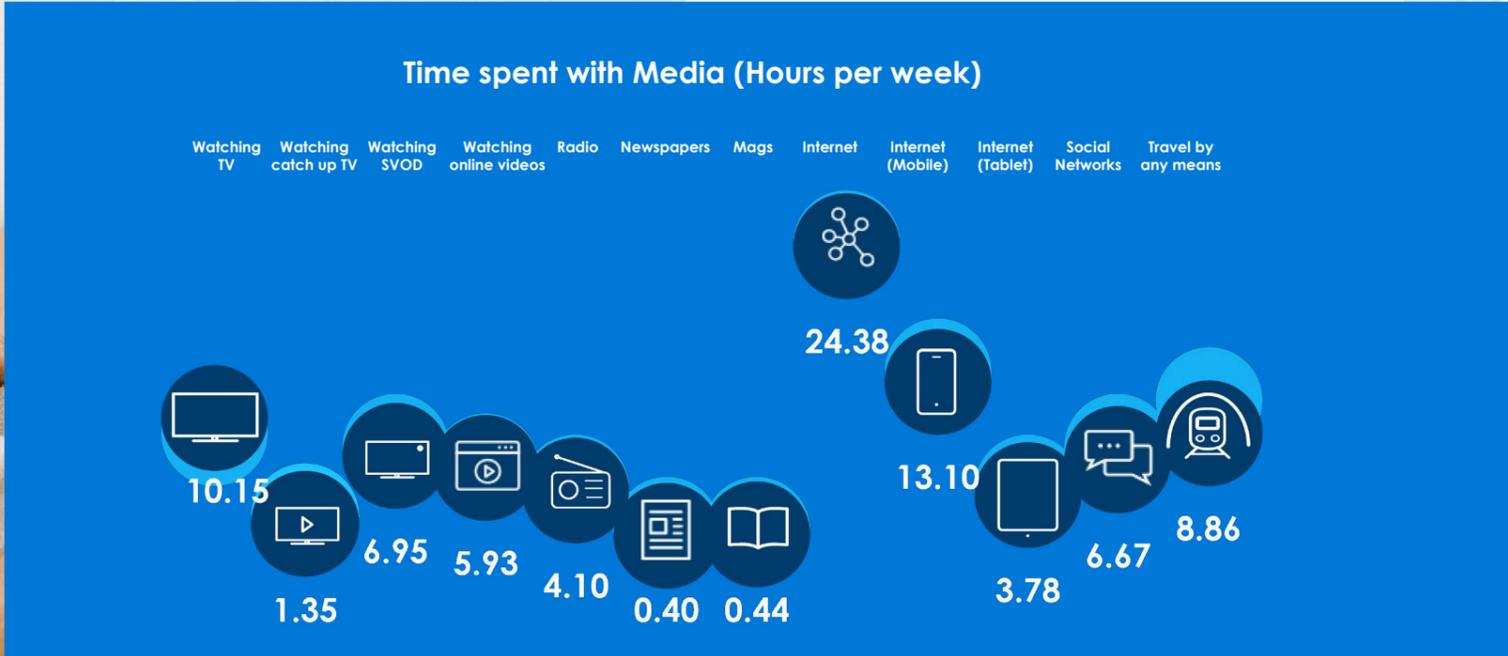
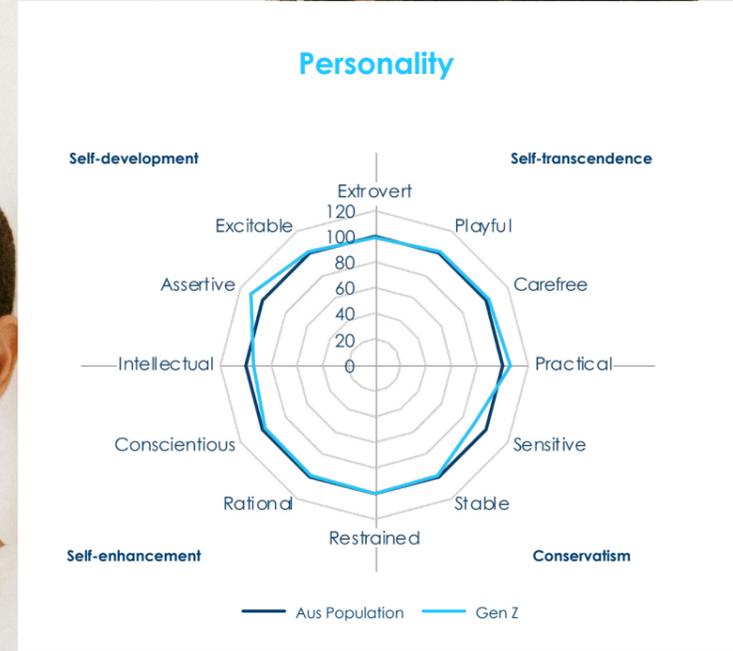
Insular: 'When i'm at home, I like to shut myself off from the rest of the world' 51% ix 107

Patriotic: 'Australian beer is the only beer worth drinking' 12% ix 134

Unconvinced: 'Globalisation brings more problems than it solves' 49% ix 112



Source: iCCS June 2020 | Suburban Sceptics compared to Gen Y 25-39 (born 1982-1997)





How to engage with Suburban Sceptics

01. Understand that their home is the centre of their world

Family, community and the home are what makes this cohort tick. Brands should engage with this group within the comfort and safety of their home, postcodes and communities.

This group like to shut themselves off from the world when they are at home, turning a blind eye to major world events, instead leaning into home improvement and family life.

Consider how your brand can help improve home and living life.

02. Local issues trump global ones

This is a patriotic and proud cohort. They care less about brands that are tackling global, societal, and environmental issues, but get behind brands who champion local issues that may directly affect them (think: the local footy team, or the Great Barrier Reef).

Many within this group are concerned with security and safety, so think about how your brand can play a part in delivering this.

03. Take time to build trust

This segment are inherently sceptical of the government, major societal movements, and are resistant to change.

Think about how your brand can build trust with them over a long period of time. TV advertising is something they lean into.

As the least influential and trend-driven audience, they need time to understand and will look to others first before leaning into new brands.

04. Make it fast & easy

This cohort are always looking for ways to make life faster, simpler and easier. From fast food options to product inspiration, they are receptive to brands and products who understand their busy family lives.

Also consider brand experiences that are inclusive of the whole family, especially older children.

Think: Kmart life hacks, air fryer recipe hacks, school holiday ideas.

05. Value is key

While this cohort aren't the biggest spenders, they will spend with brands that clearly deliver value.

With more pressures on finances, big savings goals such as new homes and cars take longer for them to achieve. Consider various ways to educate and create new habits to help them achieve their longer term goals.

Don't dumb it down for them, but show how they can take charge themselves.

Source: ICCS June 2020 | Suburban Sceptics compared to Gen Y 25-39 (born 1982-1997)



Front Hustles: the hard data

Who are they? Front Hustles are your typical 'Work Hard, Play Hard' audience.

This cohort are fixated on their career goals, but not as ready to start families just yet.

They love expensive luxury items and are happy to pay more for better quality.

They are harder to reach in media due to their busy lives but love an online sale such Cyber Monday.

Health, fitness and nutrition are very important to them, and good food fuels them to be a boss at work. And they are very confident with all aspects of their lives from finances, to social, to health.

The Basics

Male
52% ix103

Live with partner no children
23% ix123

University educated
50% ix103

Married
51% ix99

Employed Full-Time
64% ix118

Speak language other than English
32% ix89

Queer: Gay/lesbian
ix86

Metro: Regional
71% ix98: 29% ix104

Attitudes & Interests

Driven: 'I am very ambitious' 78% ix 146

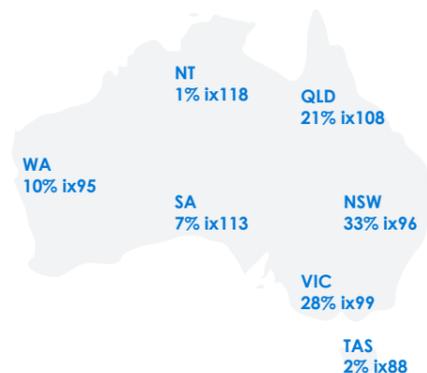
"I like to challenge and push myself to be the best i can in life" 88% ix 139

Career focused: 'My career is very important to me' 83% ix 132

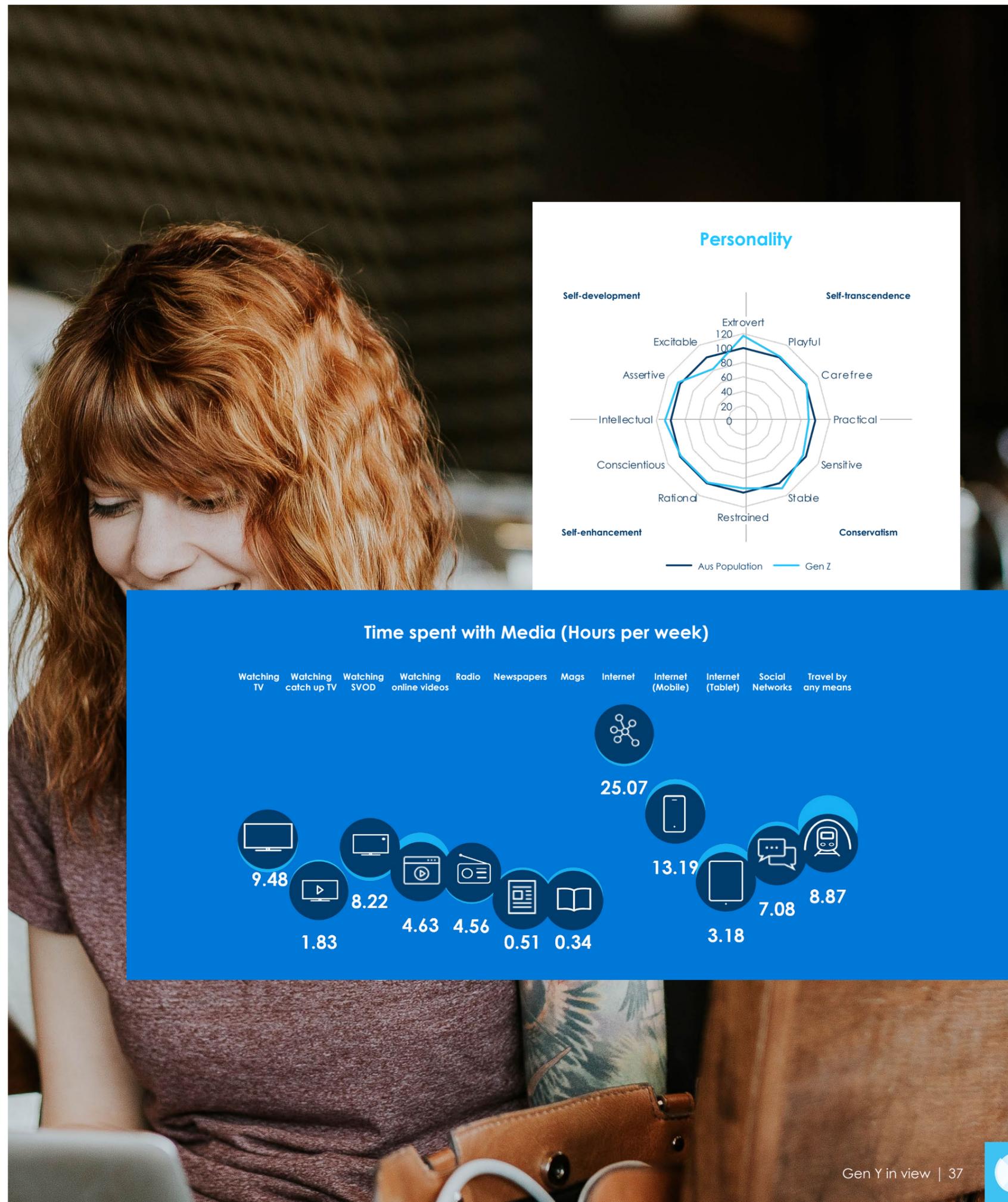
Outgoing: 'I'm more extrovert than introvert' 29% ix 117

Premium: 'I like to treat myself to luxury items' 48% ix 117

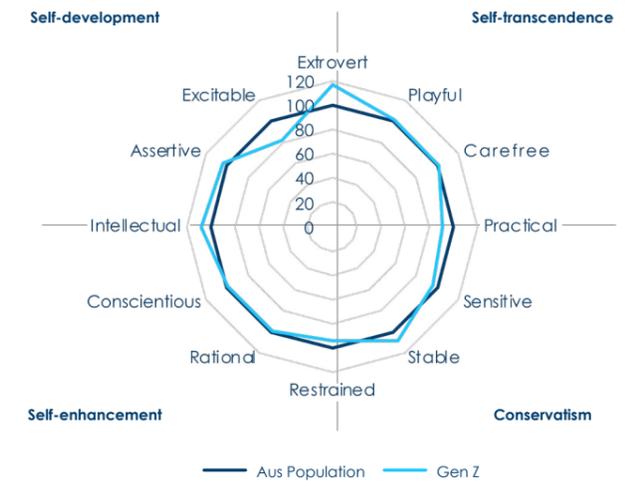
Financially confident: 'I feel financially stable at the moment' 61% ix 112



Source: iCCS June 2020 | Front Hustles compared to Gen Y 25-39 (born 1982-1997)



Personality



Time spent with Media (Hours per week)





How to engage with Front Hustles

01. Enable a luxe life

This group have money and time to spare, and are excited by both retail and online shopping experiences.

Ensure you position your brand and products as premium, and don't cut costs with sponsorships, production or talent.

Consider partnerships with other premium brands to leverage credibility and brand love from them.

02. Fuel their drive

Create a unique place in their hearts by recognising the link between health and their career goals.

Fuel their everyday drive and passion with healthy food and drink options, and reward them with premium dining or wellbeing experiences.

A healthy and well rested Front Hustle will smash goals at work (and love your brand for enabling it)!

03. Be as extroverted & adventurous as they are

This group like to live large, enjoying adventure and experiences with their like-minded friends and co-workers.

They want brands who have personality and status, both locally and internationally.

Consider how your brand and messaging can balance big personality alongside premium.

04. Offer exclusive online shopping experiences

Consider how online retail events such as ClickFrenzy and AfterPay Day can be used as platforms to engage with this group.

VIP sections. Exclusive offers. Surprises at check-out or delivery.

Get them excited about all aspects of engaging with your brand from exposure through to purchase and advocacy.

05. Streamline health, career and social events

Consider their relationship with their gym, workplace, home, and social venues.

How can your brand or product be seen consistently across all of these areas?

What messages are relevant to them when they are in a work vs relax mindset? Even though they are driven, they will need to relax and switch off at some point.

Source: ICCS June 2020 | Front Hustles compared to Gen Y 25-39 (born 1982-1997)



Plant Powers: the hard data

Plant Powers are highly motivated by altruism and collectivism, always thinking about the greater good. They are highly eco-conscious and driven by social causes.

Plant Powers tend to be less technologically advanced than other segments, however have serious spending power when they do find brands and products that align with their values.

They are highly engaged with arts and culture outside of popular culture, often donating their time and money to charities.

The Basics

Female
62% ix124

Live with partner no children
78% ix101

University educated
50% ix102

Married/De Facto
50% ix97

Employed Full-Time
50% ix91

Speak language other than English
32% ix90

Queer: Gay/lesbian
ix69

Metro: Regional
73% ix102: 27% ix96

Attitudes & Interests

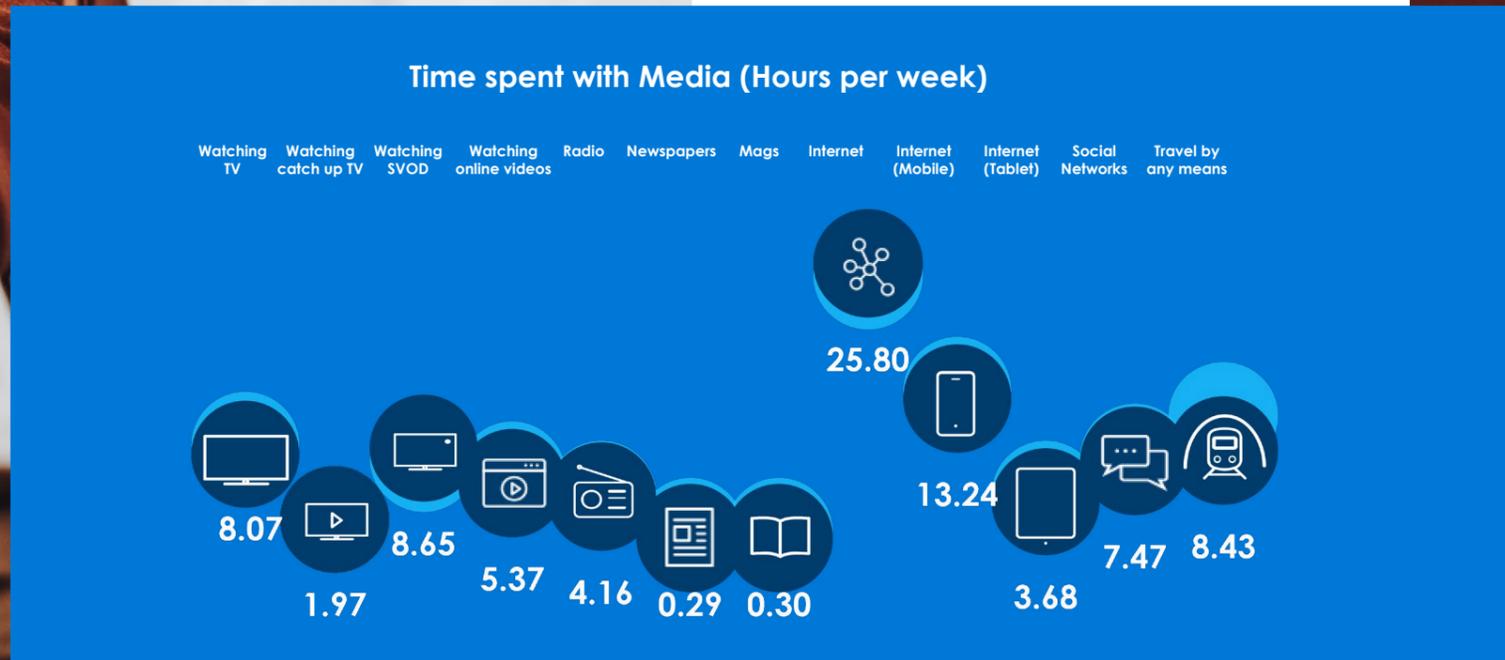
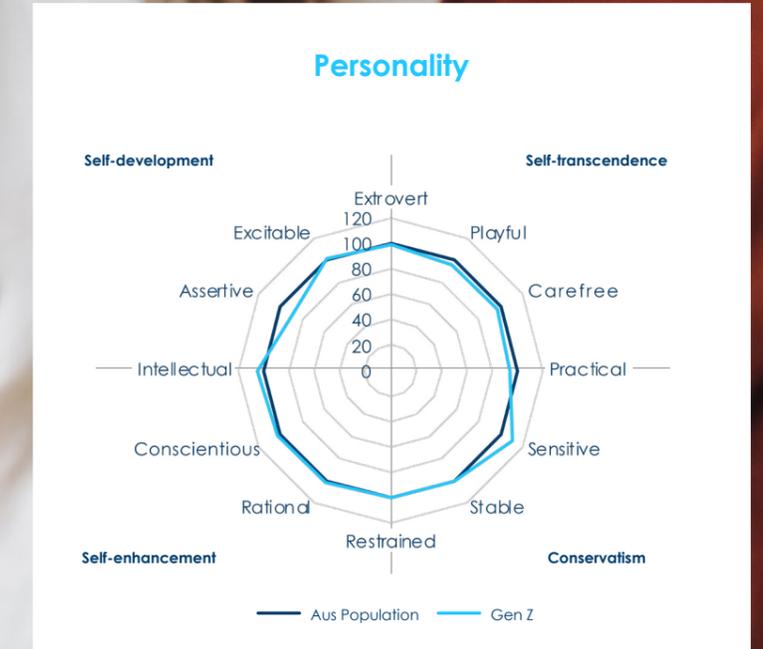
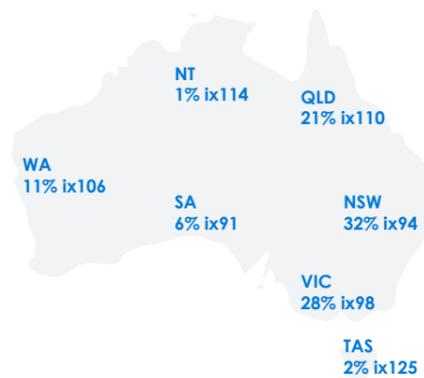
Eco-conscious: 'I am changing my diet to eat fewer animal products/more plant-based foods' 67% ix 150

Socially conscious: 'It is important to me that companies provide information about how their products are made' 91% ix 149

Cultured: 'I like to learn about art and culture' 76% ix 139

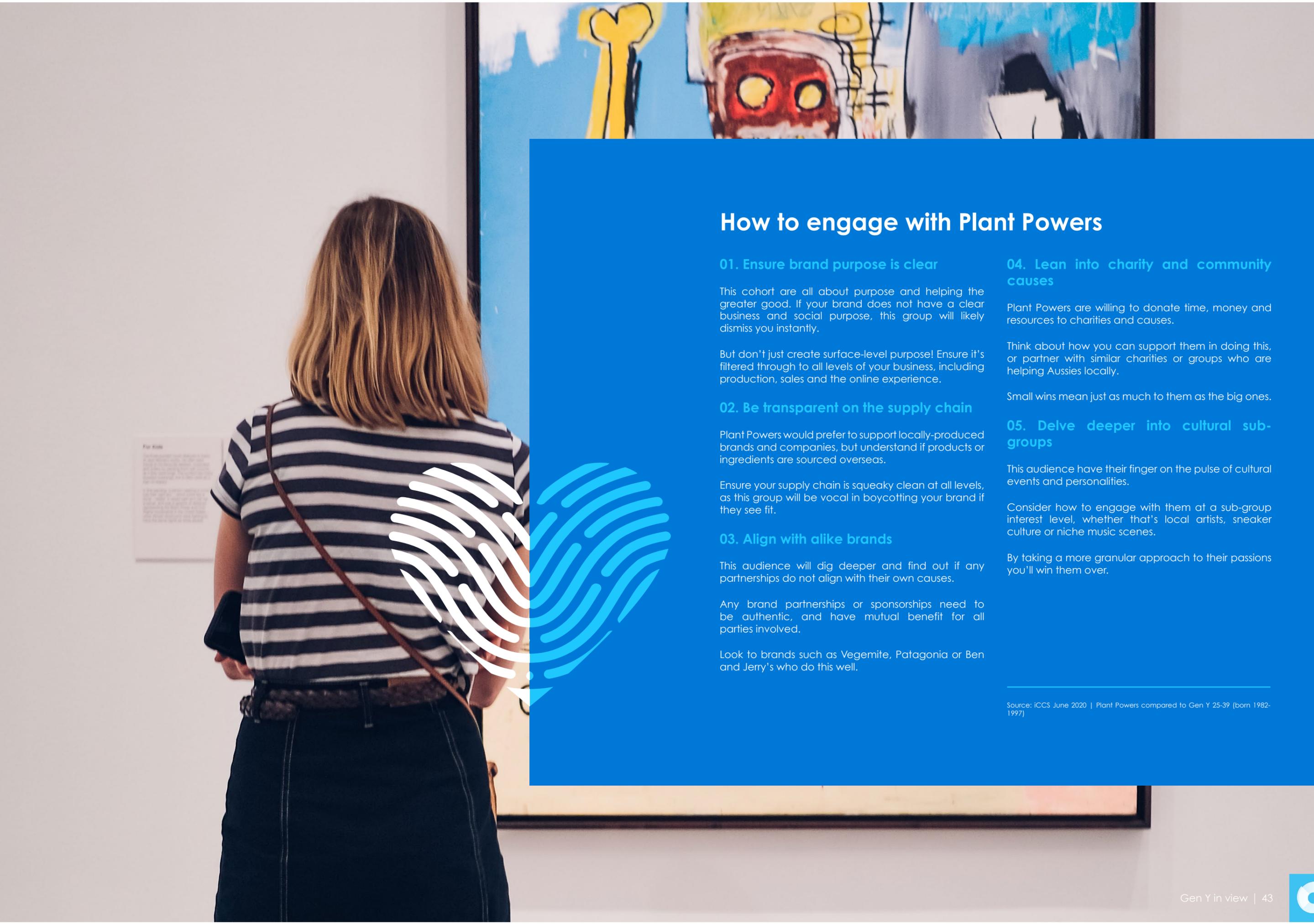
Information seekers: 'I like to know where my food comes from' 86% ix 131

Passionate: 'You should seize every opportunity as it arises' 77% ix 112



Source: iCCS June 2020 | Plant Powers compared to Gen Y 25-39 (born 1982-1997)





How to engage with Plant Powers

01. Ensure brand purpose is clear

This cohort are all about purpose and helping the greater good. If your brand does not have a clear business and social purpose, this group will likely dismiss you instantly.

But don't just create surface-level purpose! Ensure it's filtered through to all levels of your business, including production, sales and the online experience.

02. Be transparent on the supply chain

Plant Powers would prefer to support locally-produced brands and companies, but understand if products or ingredients are sourced overseas.

Ensure your supply chain is squeaky clean at all levels, as this group will be vocal in boycotting your brand if they see fit.

03. Align with alike brands

This audience will dig deeper and find out if any partnerships do not align with their own causes.

Any brand partnerships or sponsorships need to be authentic, and have mutual benefit for all parties involved.

Look to brands such as Vegemite, Patagonia or Ben and Jerry's who do this well.

04. Lean into charity and community causes

Plant Powers are willing to donate time, money and resources to charities and causes.

Think about how you can support them in doing this, or partner with similar charities or groups who are helping Aussies locally.

Small wins mean just as much to them as the big ones.

05. Delve deeper into cultural sub-groups

This audience have their finger on the pulse of cultural events and personalities.

Consider how to engage with them at a sub-group interest level, whether that's local artists, sneaker culture or niche music scenes.

By taking a more granular approach to their passions you'll win them over.

Source: ICCS June 2020 | Plant Powers compared to Gen Y 25-39 (born 1982-1997)



Community Spirits: the hard data

Community Spirits skew towards families with kids, and a more traditional values-driven lifestyle.

Religion and spirituality are very important to their lives, and as such they rely on their local community groups for influence and advice.

They are the most culturally diverse segment out of all five segments, with many speaking languages other than English and being born overseas.

And when it comes to brands and spending, they are cautious, choosing only to engage with brands that make their busy family lives easier.

The Basics

- Female** 52% ix105
- Live with partner and children** 35% ix113
- University educated** 51% ix105
- Married/De Facto** 55% ix109
- Employed Full-Time** 51% ix93
- Speak language other than English** 42% ix120
- Queer: Gay/lesbian** ix121
- Metro: Regional** 75% ix105: 25% ix88

Attitudes & Interests

Religious: 'My religion plays an important part in my life' 77% ix 226

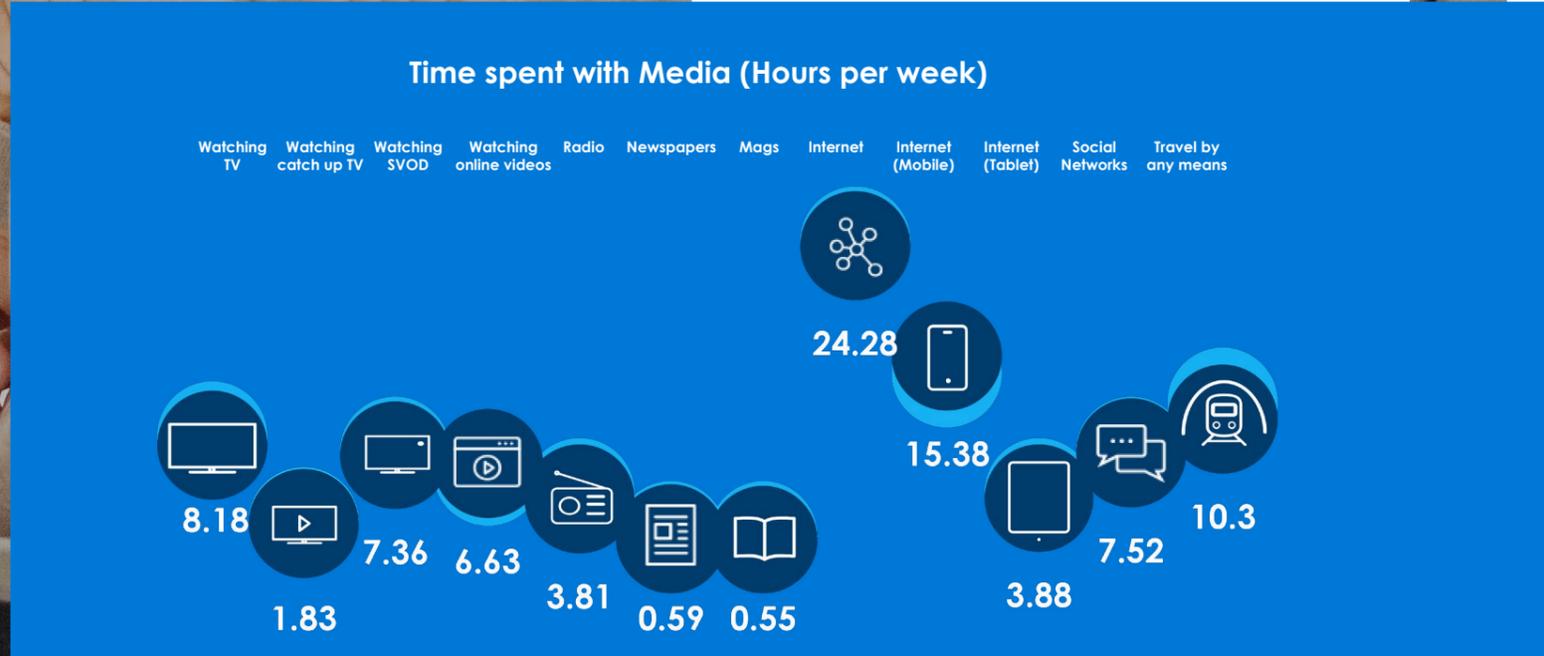
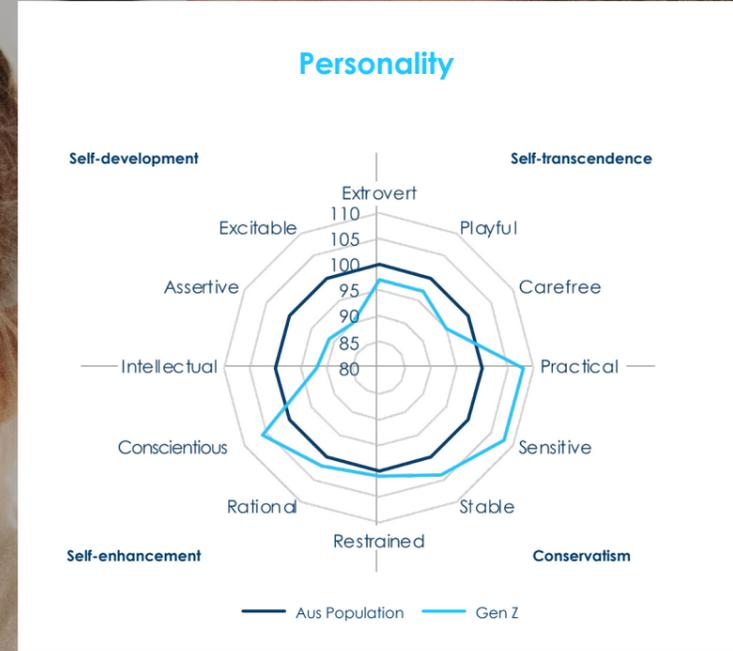
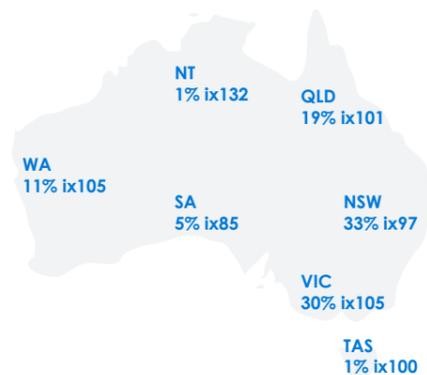
Spiritual: 'The spiritual side of life is important to me' 90% ix 189

Traditional: 'It is important for couples to get married' 76% ix 177

'I believe in traditional roles in the family' 75% ix166

Cautious: 'The fundamental values of our society are under serious threat' 58% ix 122

Family focused: 'I prefer to spend time with family over friends' 66% ix 114



Source: iCCS June 2020 | Community Spirits compared to Gen Y 25-39 (born 1982-1997)





How to engage with Community Spirits

01. Showcase diverse communities

This group come from a wide variety of backgrounds and cultures, so consider a true reflection of all cultures within your messaging.

Partner with like-minded stations and programs such as The Project, Masterchef or SBS Radio.

Be respectful of different views and practices throughout the year.

02. Help make small wins with family time

Life is busy, fast-paced and hectic for this audience, so helping make life easier will win you big points.

Consider content, inspiration or fun activities to do as a family across breakfast, evenings and weekends.

Think: Big W's lockdown activities or Woolies' 'Big Night In'.

03. Create time-out for them

This segment love taking time out to read magazines to unwind and relax.

Consider other ways your brand or products could enable this special time-out time for them. It doesn't have to be a huge gesture, sometimes simple moments alone at home are all they crave.

04. Use emotion

Community Spirits are big softies. They value their families, communities, worship groups and friends as the most important parts of their lives.

Consider how emotion can be used in our messaging, as well as genuine acts of support to these community groups to win their hearts and minds.

05. Deliver inspiration for their homes

As this group spend a lot of time at home, think about how your brand can deliver content and excitement to enliven the everyday.

Whether it's cooking recipes, home DIY tips or decorating ideas, help make their home even more enjoyable for them.

Programs like The Living Room and The Block can act as contextual links between your brand and their homes.

Source: ICCS June 2020 | Community Spirits compared to Gen Y 25-39 (born 1982-1997)

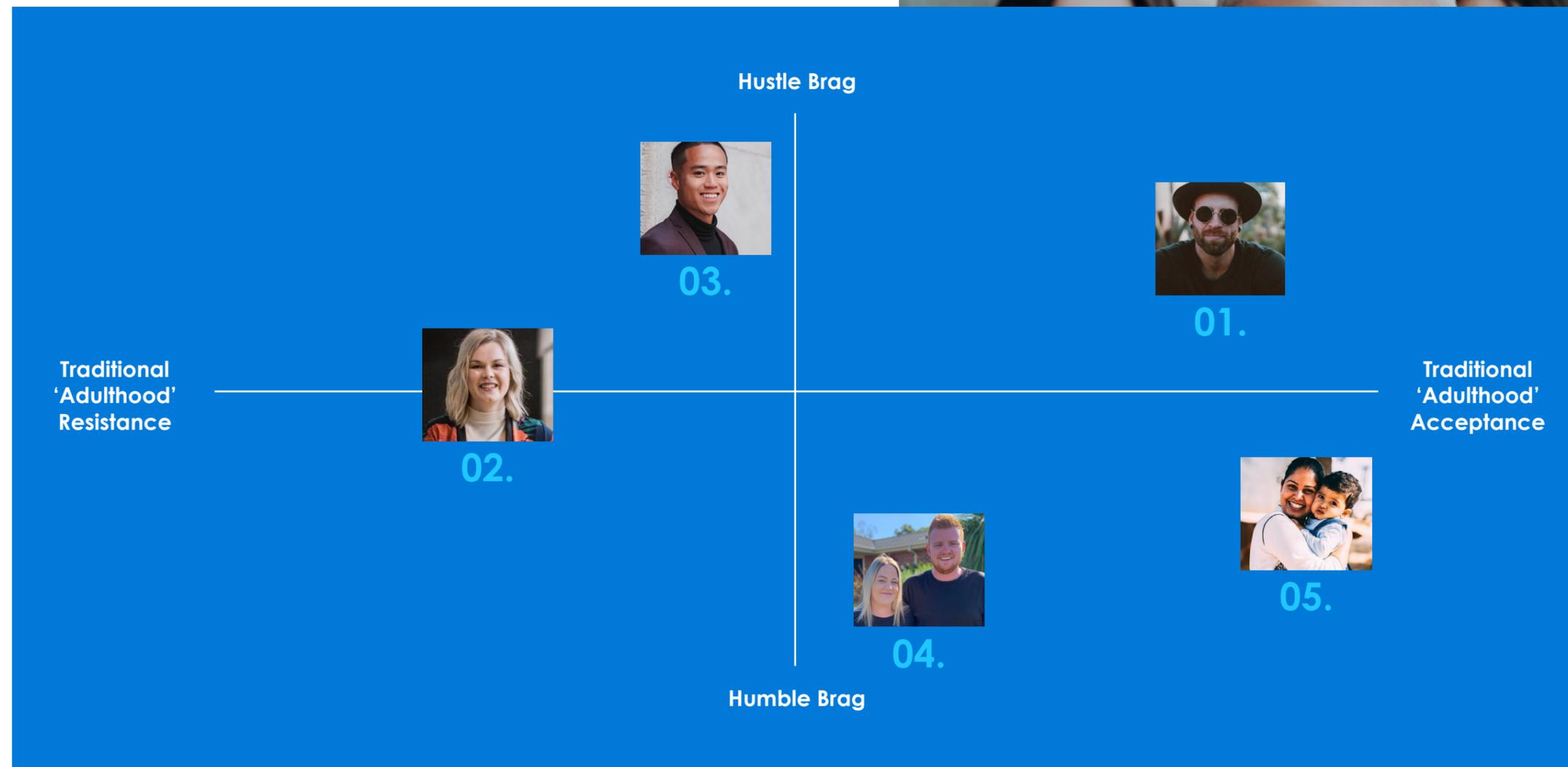
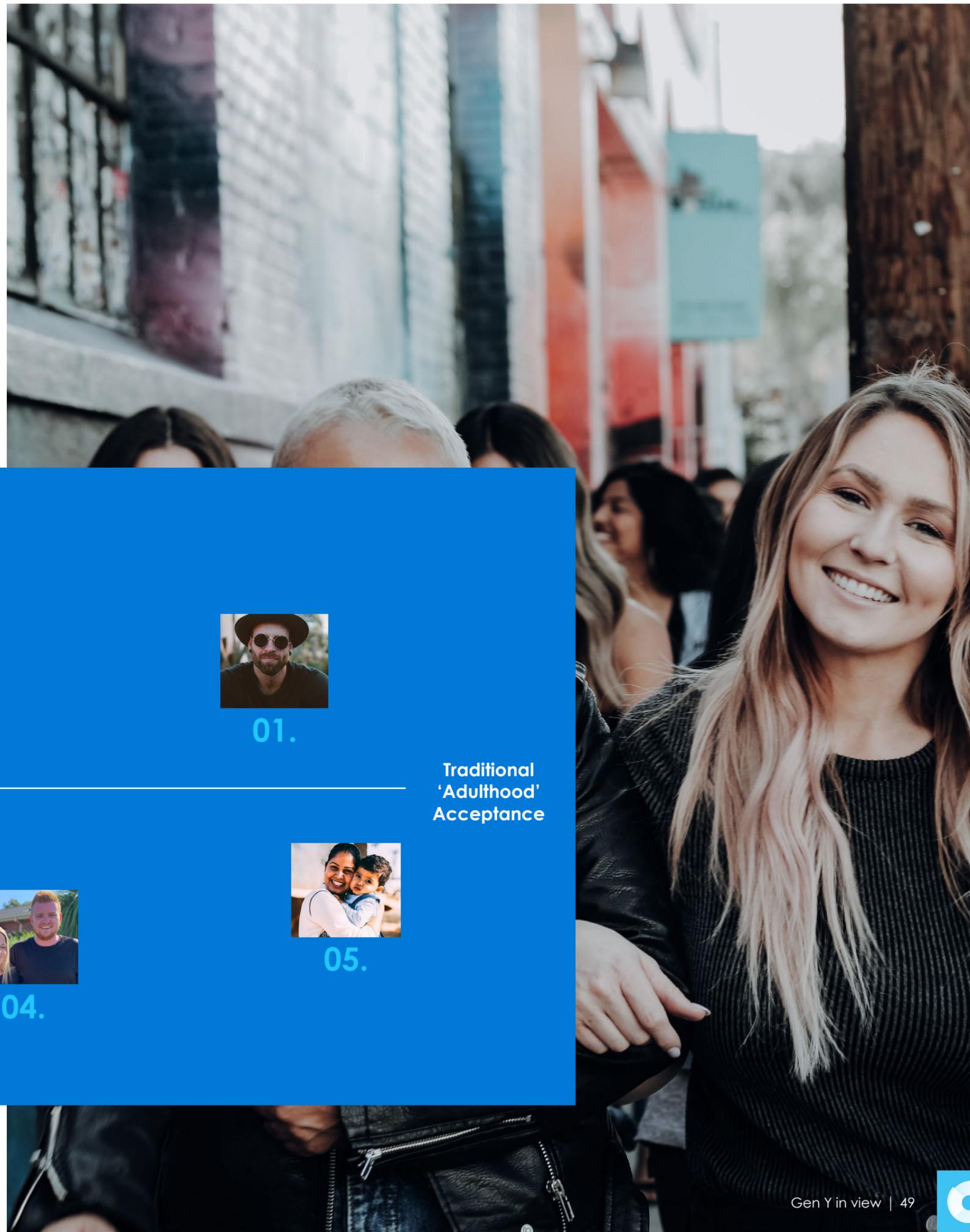


Comparing our Gen Y Typologies

As a final summary of the Gen Y typologies, we've mapped them out on an "Adulthood vs Hustle" axis. Segments on the left tend to be more resistant to Traditional 'Adulthood' life stages such as marriage, children, and home buying, while segments on the right tend to be moving full steam ahead with those life stages.

Segments towards the top of the axis are more motivated by the 'Hustle Brag', leading trends and forging ahead in careers and technology with pride. And those down the bottom are more burnt-out and overwhelmed by tech and careers, slowing down, and opting follow trends from others instead.

Now that we can visually see where each of these groups sit compared to each other, which one is most relevant to your category, brand, and products?



Where to from here?

Well across Carat, and throughout Dentsu, we have many products, partners and avenues that can help your brand overcome the barriers to effective communications with this cohort.

We look forward to working with you soon!

dentsu DISCUS

Understand how this audience feels week to week.



Understand how you can build trust with this audience.

dentsu intelligence

Identify who the most valuable Gen Y are for your brand.

CARAT strategy

Design communications experiences that earn their attention.

the story lab

Understand how you can infiltrate their trusted network of influence.

dentsu programmatic

Identify how you can reach this audience with precision.

Chat to us

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