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Inkling worked with Censuswide to carry out a bespoke survey of UK Millennials to better understand their motivations and behaviour.

With an extensive panel of 69,000 general consumers, Censuswide was able to target a selection of Millennials, to uncover some engaging results and demonstrate the emerging trend of the ‘mindful consumer’.

Censuswide typically surveys over a thousand general consumers, with the intention of adding gravitas to their clients’ PR and marketing campaigns through the release of pertinent, newsworthy stats. As a targeted demographic, a sample of Millennials was commissioned by Inkling to uncover emerging trends amongst the group. The survey revealed differences in results between genders, regions, cities and even the industry in which the respondent worked.

Censuswide abides by the ESOMAR26 and MRS code, which ensure that their web communities and databases are fit for purpose, reputable and compensated fairly. This ensures that results are received positively by journalists and stand up as credible in the press. Resulting from this, Censuswide’s clients include LinkedIn, KPMG, Coca-Cola and Virgin amongst a whole host of others, both in the UK and internationally.

THE FOODIES. THE ‘ME’ GENERATION. THE ‘ALWAYS ON’ GENERATION. LOTS OF LABELS HAVE BEEN GIVEN TO UK MILLENNIALS, BUT DO WE TRULY KNOW THE ‘REAL’ THEM?

Making up a quarter of the UK population and predicted to hit the 17 million mark by 2019, a broad range of behaviours and beliefs have been attributed to the 16-34 year old cohort. But, as with any other collective of people, there are commonalities, differences and misconceptions about this audience.

For the most part, these perceptions and conclusions have been extrapolated from American research data and held up as fact for UK marketers.

We thought it was important to test some of the key themes and ‘truths’ surrounding Millennials with a 100% UK sample. From creating successful content to ethical consumption; influencer outreach to the importance of wellness.

In order to get a nuanced picture of this generation’s hopes, dreams and attitudes towards life across different geographical regions and life stages, we commissioned a study with our survey partner Censuswide.

We unearthed a wide array of insights that both reinforced and challenged our understanding of this audience.

This report has been written to be both informative and concise, so if you would like any further information on any of the topics covered, please don’t hesitate to get in touch.

We hope you enjoy the read (and learn something useful along the way).

Thanks
David Proudlock, Strategy Director
Lumping any demographic into one box has inherent dangers. Although certain common characteristics have emerged about the millennials in the UK, on the flip side, there are some interesting differences that are worth noting. Here are our top ten findings:

### 01. Being Healthy and Enjoying Your Work is the New Rich
Being physically and mentally healthy topped the list (77%) for UK Millennials when asked what would most help them live a happier, more fulfilled life. Enjoying their work and profession ranked higher than having friends and an active social circle. Having a family ranked lower (46%), as did being wealthy (47%), in comparison.

### 02. The Narcissistic Generation Turns Out to Be an Accurate Tag
Surprisingly, volunteering and making a positive contribution to their community was at the bottom of the list for UK Millennials when it came to what would help them live a happier life.

### 03. Mental Health Is More Important Than Physical Health
Mental health beats out physical health when it comes to UK Millennials’ health and wellness with 54% rating mental health as being of utmost importance versus 47% for physical health.

### 04. Younger Millennials Value Enjoying Work and Having a Family More Than Older Ones
An interesting variation came from the fact that a higher percentage of younger Millennials (aged 16-24) ranked enjoying their work/profession and having a family as paths to happiness when compared to their older counterparts (aged 25-34). This might suggest idealism among the younger lot, or even a jaded older group.

### 05. Healthcare Is Their Biggest Concern
The NHS was the issue with the highest concern for UK Millennials in our survey, with three quarters ranking it on top. Affordable housing came in next (62%) followed by the environment and global warming (38%). These issues emerged higher over others on the list that included a united Britain and its relationship with the EU, immigration, tuition fees and local businesses competing with large corporate chains.

### 06. They Aren’t Worried About Owning a House
Only a quarter of the respondents said they were worried about owning a house. This reflects both the prevailing sharing/renting economy associated with Millennials, as well as how the average house price in the UK is out of reach for most of them. This might also indicate a shift towards the model of preferring renting to ownership, as is the case in other parts of Europe.

### 07. Male Millennials Are More Concerned About Supporting Local Businesses Than Their Female Counterparts
More male Millennials in our survey felt that local businesses competing with larger corporate chains is an important issue to them versus female Millennials (28% versus 19%). Female respondents conversely were more concerned with the environment and global warming, as well as Britain’s relationship with the EU.

### 08. Millennials Don’t Want Their Social Networks to Define Their Generation
On the flipside, for a generation who lives on social networks, only 19.4% of the surveyed UK Millennials wanted their generation to be remembered for social networking. There is a gender split at play here as well—only 14% of female Millennials want their generation to be remembered for social networking versus their male counterparts (30.2%).

### 09. London Millennials Care as Much as Scottish Millennials About a United Britain
Surprisingly, an almost equal percentage of London and Scottish Millennials ranked ‘Britain staying united’ as being important to them.

### 10. They Want to Be Remembered for Developing Technology and Improving Gender and LGBT Equality
The top three things UK Millennials want their generation to be remembered for are - the development of technology (40%), improvement in gender and LGBT equality (38.5%) and improvement in race relations (32.5%). There is a clear theme of openness and acceptance of diversity in race, gender and sexual orientation within this group.
Millennials are not averse to advertising – they just don’t want marketing to exploit them with gimmicks and rhetoric. So if authenticity is the key currency for this demographic, we wanted to delve further into what this entailed in terms of brand attributes and actions.

We explored the various aspects of what makes a brand authentic to this audience. It turns out that over half (55.2%) of the surveyed Millennials ranked brands that stood for high quality as being the most authentic. This was followed by brands that talked to them like a real person (44%) and brands that made enjoyable and relatable advertising and content (35%).

Co-creation also seems to be on the agenda. Brands that involved this audience in creating their products and asked for their feedback came in at a close fourth when looking at authenticity (34%).

“A LOT OF BRANDS SAY THEY WANT TO BE EDGY AND AUTHENTIC, BUT BY THE TIME THEY GET INTO WHAT EDGY IS GOING TO ENTAIL, THEY GET NERVOUS ABOUT ANYTHING THAT’S NOT MAINSTREAM. BUT THE REALITY IS THAT VERY FEW BRANDS WANT TO DO RISKY STUFF. WHILE SOME ARE DARING, OTHERS ARE AVERSE, AND END UP MAKING NOISE THAT HAS NO REAL CUT-THROUGH AND VALUE WHEN YOU LOOK BACK AT IT”

MATT ELEK, MANAGING DIRECTOR OF VICE EMEA

Only 29% of the respondents cited a brand’s heritage and history as an attribute of authenticity. However, if your brand’s biggest asset is its heritage, it’s not all doom and gloom with this crowd. The good news is, about three quarters of our survey respondents said that a brand with a long history and heritage has a positive impact on their purchase decision, with those living in London the most likely to be positively impacted by a brand’s heritage and history (82.2%).

NEW BALANCE

When the documentary ‘American Made Movie’ highlighted the trend of American companies sending manufacturing work overseas, a powerful story it featured was of the footwear brand New Balance bucking the trend and growing its business in its local factory in Maine. Not only did the heritage story come through in a genuine way, but it also reflected New Balance’s brand ideals and what it stands for, in the world of Millennials who were seeing a dip in ‘American-made’ goods around them.

The key point New Balance got right was to share their heritage and philosophy in a compelling way without making it a history lesson. New Balance also managed to identify that the sentiment of the demise of manufacturing in the US was their right to enter the wider cultural conversation, which ensured that their narrative was relevant and topical to this audience.
CASE STUDY

CONSUMPTION VS. IMPACT

From the rise of ethical fast food to brands that champion human rights, UK Millennials are distinguished by their propensity to side with brands that are underpinned by ethical principles.

Chipotle’s award-winning ‘Cultivate’ film identified Millennials’ relationship with their food and how that fits in with their environment and community-conscious mindset.

Brands need to go beyond offering products and services for Millennials to buy - they need to make a positive impact on the world.

From our survey, we found that nearly 70% of the respondents said that they would consider a brand’s ethics and values when deciding their purchases. A higher percentage of female Millennials do not consider a brand’s ethics and values when making purchase decisions (10.2%) versus male respondents (8.1%). Eastern England had the maximum number of respondents who would consider a brand’s ethics and values when purchasing, followed by London.

Given that Millennials demand authenticity, one caveat is that you can’t just ‘greenwash’ your way into their minds and wallets. Being cynical of institutions and messages being pushed down on them, Millennials will quickly call out a farcical CSR attempt to earn credibility.

H&M CONSCIOUS CAMPAIGN

H&M paved the way for making sustainable fashion a part of the Millennials’ wardrobe by launching their H&M Conscious range of clothing made from sustainable materials. This platform has since grown to include awards and partnerships with the likes of The Guardian to have a dedicated ‘sustainable fashion hub’ to highlight sustainability practices. The range also includes collaborations with organisations such as the WWF as well as music festival ‘swap shops’ where t-shirts were given away in exchange for old clothes. By proactively choosing to publish the list of factories that supply up to 95% of its stock, H&M has identified that being transparent and authentic is the only way to appease the cynical Millennial mind that knows the difference between a genuine effort versus a PR stunt.

BRAND IMPACT

Ethical buying is here to stay, so it’s important to think also about how you can create and curate engaging content that encourages an ethical purchase choice.

ETHICAL BUYING

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“IT’S NOT HARD TO MAKE DECISIONS WHEN YOU KNOW WHAT YOUR VALUES ARE.”

ROY DISNEY

70% OF RESPONDENTS CONSIDER A BRAND’S ETHICS AND VALUES WHEN MAKING PURCHASES WHILE...

JUST 10.2% OF FEMALE MILLENNIALS AND 8.1% MALE RESPONDENTS DO NOT CONSIDER A BRAND’S ETHICS AND VALUES WHEN MAKING PURCHASE DECISIONS

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BRAND IMPACT

Ethical buying is here to stay, so it’s important to think also about how you can create and curate engaging content that encourages an ethical purchase choice.
60% of UK Millennials will engage with online content that interests them, even if it’s obvious that it’s been paid for by a brand. The barrier to reaching this audience is often the ‘what’ of your messaging itself, not the ‘who’s selling me something’ and ‘why should I care’ questions, which are also potential stumbling blocks.

**MILLENIALS ARE THE FIRST MAJOR GENERATION THAT HAVE ALMOST ALWAYS HAD THE INTERNET AND DON’T THINK OF INFORMATION FLOW THE SAME WAY AS THEIR PARENTS. BUZZFEED MADE TWO VERY IMPORTANT DECISIONS EARLY ON: NO DISRUPTIVE MESSAGING (LIKE BANNER ADS), AND FOCUS ON OPTIMIZING THE INDIVIDUAL PIECES OF CONTENT, RATHER THAN A MAJOR DESTINATION. IT’S A SIMPLE, BUT ELEGANT WAY OF RETHINKING THE WAY STORIES MOVE IN TODAY’S COMPLICATED MEDIA LANDSCAPE”**

— JOE PUGLISI, DIRECTOR OF CREATIVE STRATEGY AT BUZZFEED

News articles still top the list in terms of the type of online content this audience consumes (76%) which explains the rise of social networks like Facebook and Twitter doubling up as news aggregators. UK Millennials also look to alternative sources for their online media such as Mashable, Buzzfeed and Vice, but for all their visibility, these channels still only account for 6% of how this group gets their daily dose of news and views. Household names such as The Guardian and The Telegraph still account for a major 85% of websites where UK Millennials head to for news. Trailing behind news is sports content (38%) and lifestyle articles (24%). Films and music follow. Written feature articles dominate (32%) the type of sponsored online content this audience prefers to consume, followed by list-based articles (24%) as popularised by the likes of Buzzfeed. Not surprisingly, videos come in next (17%) followed by social network posts (13%), blogs (9%) and podcasts (5%).

Our survey revealed a hierarchy of platforms when it comes to where UK Millennials expect their brands to exist. TV still reigns supreme when it comes to where the surveyed UK Millennials are most receptive to brands, topping the list at 68%. Facebook came in at second place (45.2%), which provides further evidence of the influence of this social network as a channel for brands’ presence. Newspapers and traditional media (39%) round off the top three. Billboards, tube/bus stop advertising and radio all came above Twitter and Instagram surprisingly, indicating that other social networks aren’t as strong as Facebook with this audience versus traditional media channels. Interestingly, younger Millennials (aged 16-24) ranked newspapers/traditional media as well as billboards significantly higher than older Millennials (aged 25-34) when it came to brand channels. Millennials from the Midlands and Scotland are more likely than London Millennials to want their brands to have a presence on TV, the opposite is true when it comes to Facebook and Instagram.

One could argue that not every brand has the luxury of selling products meant for inherently cute and viral-video-friendly creatures, but Purina’s smart content strategy gave this cat brand a uniquely own-able slice of the content (fish) pie. Purina partnered with Buzzfeed and utilised popular video channels, Vine and Youtube, to ensure shareability of their humourous and emotional films.

By focusing on the entertainment value of their content (even letting YouTube creators remix and make their own versions of their ads), and enforcing a platform agnostic approach, Purina has provided a blueprint for other brands for leveraging emerging content platforms and channels.
LOYALTY

SERVICE IS KING

Our survey found that UK Millennials would stay most loyal to brands, not in fact with the best price deals, but actually to the ones who offer them the best support and service.

A higher percentage of female Millennials said that they’d be loyal to brands that offer superior customer support and service versus their male peers, who were much more likely to be loyal to brands that helped make their daily lives easier (with apps and tips). When it came to differences in age amongst Millennials, older Millennials (aged 25-34) said that they’d stay loyal to a brand that was socially and environmentally responsible, versus younger Millennials (aged 16-24) who would more likely stick with brands that gave them freebies, and those that helped them achieve their life goals.

So the key takeaway for your brand is to expand your loyalty activations beyond price-related promotions and look at the bigger role that your brand has to play in terms of service, support and simplifying Millennials’ lives.

WHICH OF THE FOLLOWING BRAND ACTIVITIES ARE MOST IMPORTANT TO YOU WHEN IT COMES TO INCREASING YOUR LOYALTY FOR THAT BRAND?

| 26.2% | 20.6% |
| CUSTOMER SERVICE AND SUPPORT | PRICE PROMOTIONS |
| 12.3% | 8.7% |
| FREE GIVEAWAYS | SOCIALLY & ENVIRONMENTALLY RESPONSIBLE |
| 8.3% | 6.7% |
| RECOMMENDATIONS | HELPS ME ACHIEVE MY GOALS |
| 6% | 1.2% |
| HELPS ME TO MAKE MY DAILY LIFE EASIER (APPS & TIPS) | ADVERTISING |
When it comes to looking for recommendations for what to buy, a whopping 72% of our survey respondents unsurprisingly turn to family and friends. This rings true for most consumers cutting across a wide cross-section of age groups. We also found that Internet search engines and reviews came second on the list (50%) for places where UK Millennials look for recommendations. Social networks (21.4%) and bloggers/experts (20.2%) came in at third and fourth place respectively, indicating the rise of the knowledge jockeys, a.k.a. influencers.

Millennials are much more skeptical of celebrity endorsements, being twice more likely to turn to their colleagues for recommendations (14%) versus celebrities (7%).

Younger Millennials (aged 16-24) are more likely to look for recommendations from their family and friends and social networks, whereas older Millennials (aged 25-34) turn to Internet search/reviews and bloggers/experts for their recommendations, indicating that the source of trust seems to come from two different places for these cohorts. Counter-intuitively, older Millennials are more likely to go with a recommendation from a celebrity versus their younger (aged 16-24) counterparts.

London Millennials (36%) are more likely to turn to bloggers and experts for their recommendations (versus 17% national average). And when it comes to be the most independent-minded buyers, Millennials from the North-East and South-East of England are least likely to look for any recommendations at all when considering a purchase.

What this data indicates to us is that each brand will need to tweak their targeting strategy when looking at different sub-sections of this audience (from gender to life stage to geography).

INFLUENCERS

We knew there were over a billion how to searches for haircare advice and how to demonstrations. Women all over the world were wanting to do their hair in certain styles and we partnered with vloggers in key markets to generate advocacy and credibility. To me it is about quality, not quantity. I would much rather choose a partner with journalistic integrity and a credible voice.”

Heather Mitchell, Head of Global PR and Social Media for Haircare, Unilever
The over-valuing of experiences over possessions for UK Millennials is so significant that they are thought to be the primary driver of the ‘experience economy’ with estimates that they spend a whopping £419.5 million monthly on live events. Over half (53%) of UK Millennials in our survey would rather spend money on an experience versus a possession (versus only 22.6% who valued material goods more than experiences).

They’re also putting their money where their mouths are, with 62% of this audience planning to increase their expenditure on experiences versus possessions over the next year.

Female Millennials were more likely than their male counterparts (56% vs. 47%) to value experiences over possessions. An equal number of both younger and older Millennials (53.2%) did the same.

In terms of cities, Millennials from London and Birmingham were most likely to over-value experiences, while in Scotland this was true for Edinburgh Millennials versus Glasgow.

**EXPERIENCES**

**MEMORIES VS. COMMODITIES**

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**FOMO AND BRAND VALUE**

But where is this momentum to over-value experiences over consumerist urges coming from, for this audience? The answer is the Fear Of Missing Out (FOMO) effect. 73% of this audience agreed that FOMO is their primary motivator in seeking out new live experiences and activities. No doubt, the social media factor of sharing such experiences with the world is an added draw.

Millennials also care about their personal brand value, and experiences deliver a higher return on their investment in terms of earning them more personal brand cred, versus material possessions.

So what does this mean for your brand?

It’s worth first looking at bringing to life what your brand stands for in the context of this audience, using experiential activations. There are many considerations when it comes to crafting brand experiences for Millennials in terms of platforms, collaborations and the ideas themselves that will deliver the best return on your investment.

When it comes to the types of events that make people feel positively about brands, music comes up trumps with about 51% of respondents ranking this on top. Sports (45%) and charity events (42%) come in second and third respectively. A millennial is twice as likely to fundraise through an event than a Baby Boomer, so integrating a charitable component to your event will go a long way to drive uptake.

**WE KNOW FROM OUR RESEARCH THAT ENGAGING IN EXPERIENCE HELPS MILLENNIALS FORM A SENSE OF IDENTITY, DIFFERENTLY FROM HOW OTHER GENERATIONS DEFINED IDENTITY AT THEIR SAME AGE.”**

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**ERIC MEYERSON, HEAD OF CONSUMER INSIGHTS AT EVENTBRITE**

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WELLNESS

No other demographic is striving to achieve healthy living more than the Millennials in the UK. From quinoa burgers in street food vans, to the success of the meditation app, Headspace, UK Millennials are taking a more holistic approach to their health and wellbeing by recognising that their wellness isn’t only about working out in the gym and eating right.

In our survey, mental health topped physical health when it comes to UK Millennials’ health and wellness with 54% rating mental health as being of utmost importance versus 47% for physical health. Vice UK featured a week long editorial focus on mental health called ‘The Vice Guide to Mental Health’ in April 2015, which explored this aspect of wellness from a distinctly Millennial lens, with pieces on the effects of recreational drugs on mental health, LGBT mental health and depression among other relevant topics.

Wellness to the Millennial has a hierarchy of elements, with mental health ranking first on the list of importance, followed by physical health, an active social life and finally spiritual wellbeing. Female Millennials ranked an active social life and spiritual wellbeing as being more important.

From the burgeoning mind training and cognitive performance improvement market, to the emergence of zen meditation apps that aim to increase positivity, tech is now increasingly being used by Millennials to help bridge gaps in all areas of their overall wellness and bump up happiness levels (and not just to count calories). This resonates with as much as 68% of the UK Millennials in our survey, who felt that technology will play a bigger role in their health and wellness in the future than it does at present (23% felt that this would be a significantly bigger role versus present). Technology that comes to mind to this audience regarding their health and wellness is restricted to apps and wearables; but does not extend to search engines, online forums and communities, which were relegated to the bottom half of the list.

Enemies to wellness such as lack of time and willpower that sabotage Millennials’ aspirational health goals are a great opportunity for brands to intervene and help them along.
MARKETING TO THE YOUNG HAS NEVER BEEN EASY. YOUNG PEOPLE HAVE ALWAYS HAD AN INNATE ABILITY TO SNIFF OUT INSINCERITY. BRANDS THAT ATTEMPT TO CYNICALLY APE THEIR STYLE WITHOUT MAKING A MEANINGFUL CONTRIBUTION TO THEIR LIVES ARE DESTINED TO FAIL.

With Millennials, this is especially true - and as they’re constantly connected through ever evolving technologies, a misstep can be fatal.

At Inkling, we’re attuned to the delicate cadences of millennial marketing where our approach is never built on lazy conclusions and ‘the way we have always done it’.

Success comes from a true understanding of the nuances surrounding, not only ‘Millennials’ as a whole, but the communities in which they exist, where they frequently flit between personalities and roles.

Brands must commit to adding value to these communities in order to build effective brands and campaigns. Formerly ‘non-traditional’ channels have now stepped out of the shadows to become the present and the future of your Millennial marketing plan.

If you would like help reaching this audience, we would love to have a chat – we do a good line in biscuits.

Thanks and we hope you enjoyed the report

Team Inkling