Understanding the new Female Consumer
MEREDITH IS MILLENNIALS
TECHSPLOKERS ZINE QUEENS MOBILE MAVENS
SOCIAL BUTTERFLIES SHOPPORTUNISTS PINFLUENCERS
63% OF MILLENNIAL WOMEN INSPIRED BY

63% OF MILLENNIAL WOMEN INSPIRED BY
Introducing Women 2020

A Look at the Next Generation of Female Consumers

Meredith’s new proprietary study designed to help marketers understand the buying behavior and decision-making processes of women by category (beauty, food, home) through the lens of life stages and the influence of technology.
Women 2020: Project Objectives

Identify what influences her and how she influences others

Explore role of digital media on buying decisions and behaviors

Uncover how digital media complements more traditional media

Contrast and compare behaviors and sentiments among generations
The Data

What Women are Thinking

<table>
<thead>
<tr>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
</tr>
</thead>
</table>

Category attitudes

- Food
- Beauty
- Home

Media engagement
Methodology

> Meredith worked in partnership with **Insights in Marketing**, an independent, third-party research vendor, to execute the research

> **Nationally representative sample** of 2,604 women
  
  — Millennials
    > Trailing: 18-24 years old (T)
    > Leading: 25-34 years old (L)
  — Gen X: 35-49 years old (X)
  — Boomers: 50-67 years old (B)
  — 60% read Meredith titles

> **Study fielded online** in Q4 2014; approximately 25 minutes in length
2020: A Pivotal Year for Millennials

80.4 million strong

Largest generation ever

Increase spending to $2.5 Trillion

Will represent majority of the work force

Account for 2/3 of all first-time home buyers

Sources: U.S. Census Bureau, interim population projections released 2012 and annual population estimates/Mintel; New Strategist Press; Realtor.com; U.S. Bureau of Labor Statistics
The Millennial Mindset
On Cloud Mine

In 2020 Millennials Think They Will...

Be happier
75%

Be more fortunate
73%

Have more opportunities
71%

Q: Thinking about 5 years from now, do you think you will...?
Issues Facing Women Today According to Millennials

Q: Which of the following is the most pressing issue facing women today in the U.S.?
She’s A Woman First
How Millennials Think of Themselves

Q: How do you think of yourself?

Woman 80%
Daughter 72%
Sister 59%
Lover 56%
Worker 46%
Who We Are and How We Role

Q: Which celebrity do you feel most accurately represents the values of the Millennial generation?
Q: Which of the following best represents your female role model?
Madame President? Yes!

Millennials ready for a female president... 83%

...and would vote for Hillary 49%
Millennials + Media
## Every Media for Itself

### Top Reasons Millennials use Media

<table>
<thead>
<tr>
<th></th>
<th>Internet</th>
<th>Print Magazine</th>
<th>TV</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Keeps me informed and up-to-date</strong></td>
<td><strong>Can glance through quickly or read throughly</strong></td>
<td><strong>Pure entertainment</strong></td>
<td></td>
</tr>
<tr>
<td>Gives me detailed information</td>
<td>Can unplug/disconnect from technology</td>
<td><strong>Relaxes me</strong></td>
<td></td>
</tr>
<tr>
<td>Lets me look at things on my own time</td>
<td>Gives me ideas for new products to try</td>
<td><strong>Gives me some “me” time</strong></td>
<td></td>
</tr>
<tr>
<td>A good source of learning</td>
<td><strong>Gives me good ideas &amp; inspiration</strong></td>
<td><strong>A good escape</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Gives me good ideas &amp; inspiration</strong></td>
<td>Inspires me visually</td>
<td><strong>Keeps me informed/up to date</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Q:** Thinking about 3 different types of media: Internet, Print Magazines and TV, what are the main reasons you use each?
Media: In Their Words

“I like the quiet feel of curling up and browsing a magazine. Even if the electricity goes out I can keep reading.”

“With TV, I can just have a mental break and escape briefly to a fictional world that isn’t trying to teach me anything”

“I can access online articles from virtually anywhere, which makes it easier to stay informed”
The Mobile Generation

Devices Millennials Regularly Use to Access the Internet

- **Laptop**: 81%
- **Smart phone**: 80%
- **Desktop**: 49%
- **Tablet**: 48%
- **E-reader**: 15%

Q: Which of the following devices do you use to access the Internet at least once a week or more often?
Q: Which of the following social media, websites or applications do you visit at least once a week or more often?
Q: What are you most likely to share via social media?

- Personal Photos / Videos: 65%
- Funny Things: 60%
- News Stories: 32%
- Educational Info/Resources: 22%
- Product/Service Recommendation: 26%
Social Reflections
How Millennials Believe People Portray Themselves on Social Media

me
I accurately represent my life on social media
74%

I have lied on social media
31%

them
My friends/family accurately represent their lives on social media
53%

My friends/family lied on social media
65%

Q: Thinking about social media such as Facebook, Twitter etc., do you think that...?
Media: Key Takeaways

> **She loves ALL media...and each has its role in satisfying her needs**

> She’s wired to be wireless and maintaining her mobility is a priority

> **Social media is a mainstay** with this generation
   — Trailing Millennials are always finding the next, new thing
   — She shares her “true self” through photos and videos but doesn’t trust others are being as authentic/real as she is

> **Cultivate sharing and keep an optimistic tone** to resonate with her
Millennials + Beauty
Nearly **80%** of Millennials think about, research and **discuss** BEAUTY.

Q: Thinking about the beauty category, how engaged, that is how much do you think about, discuss and research this category?
The Millennial Beauties

### Glamour Gal
- **73%** Looking beautiful/sexy is important to me
- **66%** Like to reward myself with a beauty indulgence

### Shopportunista
- **64%** Don’t mind spending more if it fits my needs
- **60%** Buy based on price
- **56%** Buy when I have a coupon

### Beauty Booster
- **75%** Try based on recommendations
- **70%** Look for more info if see interesting ad
- **55%** Frequently recommend products to others

### Beauty Confidante
- **76%** Feel more comfortable with products made by familiar brands
- **74%** Find brands I trust and stick with them

Q: For each of the statements below, please rate how much you agree/disagree that each statement describes you.
“When you know you look good, it makes you feel confident”

“I don’t like to spend a lot of money on trying beauty products, but if someone I trust recommends something that’s worked for them, I can justify buying something new”

“It has to work! I would rather spend more and have it actually work!”
The Value of Shared Opinions

<table>
<thead>
<tr>
<th>Category</th>
<th>Statement</th>
<th>Millennials</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Glamour Gal</td>
<td>Looking beautiful/sexy is important to me</td>
<td>73%</td>
<td>57%</td>
</tr>
<tr>
<td></td>
<td>Like to reward myself with a beauty indulgence</td>
<td>66%</td>
<td>55%</td>
</tr>
<tr>
<td>Shopportunista</td>
<td>Don’t mind spending more if fits my needs</td>
<td>64%</td>
<td>68%</td>
</tr>
<tr>
<td></td>
<td>Buy based on price</td>
<td>60%</td>
<td>38%</td>
</tr>
<tr>
<td></td>
<td>Buy when I have a coupon</td>
<td>56%</td>
<td>43%</td>
</tr>
<tr>
<td>Recommendations and Sharing</td>
<td>Try product based on a recommendation</td>
<td>75%</td>
<td>62%</td>
</tr>
<tr>
<td></td>
<td>Look for more info if see interesting ad</td>
<td>70%</td>
<td>66%</td>
</tr>
<tr>
<td></td>
<td>Frequently recommend products to others</td>
<td>55%</td>
<td>35%</td>
</tr>
<tr>
<td>Beauty Confidante</td>
<td>Feel more comfortable with products made by familiar brands</td>
<td>76%</td>
<td>77%</td>
</tr>
<tr>
<td></td>
<td>Find brands I trust and stick with them</td>
<td>74%</td>
<td>79%</td>
</tr>
</tbody>
</table>

Q: For each of the statements below, please rate how much you agree/disagree that each statement describes you.
Note: Bold numbers represent statistically significant difference
Q: Please indicate which of the following sources has the most influence on your purchase decisions for beauty products and which has the least influence.
Beauty 411

Reasons Millennials Turn to Media for Beauty Information

Print + Digital provide:

> Info on latest trends in beauty
> Ideas on how to look beautiful/sexual
> Ideas on how to improve my appearance
> Beauty options that help me look the best I can
> Information on products to help me look younger

Q: We want to understand how well print magazines and online sources deliver beauty information. Please indicate which source/sources provide each of the following.

<table>
<thead>
<tr>
<th>Print</th>
<th>Digital</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt; Contains beauty ads I find interesting</td>
<td>&gt; Allows me to research before buying</td>
</tr>
<tr>
<td>&gt; Provides coupons</td>
<td>&gt; Encourages me to share by posting ratings/reviews</td>
</tr>
<tr>
<td>&gt; Influences me to spend more on products to fit my needs</td>
<td>&gt; Provides info about product pricing</td>
</tr>
<tr>
<td>&gt; Influences me to buy based on quality, not price</td>
<td>&gt; Provides info that helps me become familiar with brands</td>
</tr>
<tr>
<td>&gt; Gives me ideas to change my beauty products seasonally</td>
<td>&gt; Helps me find brands I can trust</td>
</tr>
</tbody>
</table>
There’s Power in Print

2/3 of Millennials Take Action After Seeing Beauty Product/Idea in Print

Q: Which of the following have you done in the past 3 months after seeing a beauty product/idea in a print magazine?

- Go online for more info
- Go to store and buy
- Discuss with others
#### Ready, Set, Shop

**Actions Taken by Millennials Online Past Month**

<table>
<thead>
<tr>
<th>Online Before She Shops</th>
<th>Online While She Shops</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Compare prices</strong> 38% (T)</td>
<td><strong>Look for coupons</strong> 26%</td>
</tr>
<tr>
<td><strong>Search for reviews</strong> 38% (T)</td>
<td><strong>Search for reviews</strong> 24%</td>
</tr>
<tr>
<td><strong>Look for coupons</strong> 37%</td>
<td><strong>Compare prices</strong> 20% (T)</td>
</tr>
<tr>
<td><strong>Look for sales</strong> 35% (T)</td>
<td><strong>Look for sales</strong> 17%</td>
</tr>
<tr>
<td><strong>Compare products and features</strong> 31% (T)</td>
<td><strong>Watch how-to video</strong> 17% (T)</td>
</tr>
<tr>
<td><strong>Look for promotions</strong> 28%</td>
<td><strong>Try a promotion/text-to-win</strong> 12%</td>
</tr>
<tr>
<td><strong>Create online shopping list</strong> 16% (T)</td>
<td><strong>Use mobile payment app</strong> 9%</td>
</tr>
</tbody>
</table>

Q: Before shopping for beauty products, which of the following have you done in the past month?

Q: During any shopping trip for beauty products in the past month, which of the following have you done on your smartphone while you were in the store?
Digital Actions Across Generations

**Actions Taken Online Past Month**

<table>
<thead>
<tr>
<th>Do online before shopping:</th>
<th>MILLENNIALS</th>
<th>BOOMERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compare prices</td>
<td>38%</td>
<td>27%</td>
</tr>
<tr>
<td>Search for reviews</td>
<td>38%</td>
<td>28%</td>
</tr>
<tr>
<td>Look for coupons</td>
<td>37%</td>
<td>33%</td>
</tr>
<tr>
<td>Look for sales</td>
<td>35%</td>
<td>22%</td>
</tr>
<tr>
<td>Compare products/features</td>
<td>31%</td>
<td>21%</td>
</tr>
<tr>
<td>Look for promotions</td>
<td>28%</td>
<td>21%</td>
</tr>
<tr>
<td>Create shopping list</td>
<td>16%</td>
<td>4%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Do online while shopping:</th>
<th>MILLENNIALS</th>
<th>BOOMERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Look for coupons</td>
<td>26%</td>
<td>19%</td>
</tr>
<tr>
<td>Search for reviews</td>
<td>24%</td>
<td>9%</td>
</tr>
<tr>
<td>Compare prices</td>
<td>20%</td>
<td>13%</td>
</tr>
<tr>
<td>Look for sales</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>Watch how-to video</td>
<td>17%</td>
<td>3%</td>
</tr>
<tr>
<td>Try in-store promotion/text-to-win</td>
<td>12%</td>
<td>4%</td>
</tr>
<tr>
<td>Use a mobile payment app</td>
<td>9%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Q: Before shopping for beauty products, which of the following have you done in the past month?
Q: During any shopping trip for beauty products in the past month, which of the following have you done on your smartphone while you were in the store?
Note: Bold numbers represent a statistically significant difference.
Beauty Ambassadors

How Millennials Share Beauty Tips and Tricks

Chat
- Use a product/tell friends/family about it 45% (T)
- Share tips/tricks in person/over phone 27% (T)

Review
- Rate/review/recommend specific products online 23%
- Use a product/then review online 20%
- Share/post tips/tricks on Pinterest 17% (T)
- Use a product then post about it on Facebook 16%

Post
- Share/post tips/tricks on Facebook 13%
- Use a product then post about it on Pinterest 11%
- Share/post a video w/tips/tricks 11% (T)

Q: We’d like to understand how much you share beauty tips, ideas, inspiration and product information with others. Which of the following have you done in the past 3 months?
Key Beauty Takeaways: Millennials

> If you **educate, inspire and invite them...they'll spend more!**
  (price *does* matter)

> **Face-to-face still dominates**: give them reasons to talk,
  not just on social media
  — Encourage sharing
  — Attract with peer recommendations
  — Educate Professionals

> **Each media fills different set of needs**, so keep that in mind
  when crafting your marketing message
Key Beauty Takeaways: Generations

> **Millennials have the highest engagement** in the category followed by Gen X

> **Millennials are more likely than Boomers to:**
  - **Share online**, particularly writing reviews and sharing via social media
  - Be **sensitive to price**
  - **Use coupons**
  - **Digitally connect** before and during shopping

> Millennials and Boomers agree “**I don’t mind looking their age as I’m healthy**”

> All generations
  - Feel comfortable with products made by a brand they are familiar with
  - Rank word of mouth as the leading way they share beauty tips and tricks
Millennials + Food
Millennial Tastemakers

82% think about, research and discuss FOOD

Q: Thinking about the food category, how engaged, that is how much do you think about, discuss and research this category?
### Millennial Flavor Profiles

<table>
<thead>
<tr>
<th><strong>Whisk Taker</strong></th>
<th><strong>Comfort Foodies</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>79% Like to experiment</td>
<td>72% Comfortable with brands familiar with</td>
</tr>
<tr>
<td>77% Cooking is a creative outlet</td>
<td>70% Find a brand I trust and stick with it</td>
</tr>
<tr>
<td>62% I’m a “foodie”</td>
<td></td>
</tr>
<tr>
<td>58% Change food seasonally</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Nutritionistas</strong></th>
<th><strong>Taste Maker</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>63% Go out of my way to make sure I/my family eat healthy</td>
<td>78% Likely to try based on recommendation</td>
</tr>
<tr>
<td>55% Look for natural/organic ingredients</td>
<td>52% People come to me for advice on products/recipes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Meal &amp; Dealer</strong></th>
<th><strong>Q:</strong> For each of the statements below, please rate how much you agree/disagree that each statement describes you.</th>
</tr>
</thead>
<tbody>
<tr>
<td>64% Buy when have coupon</td>
<td>64%</td>
</tr>
<tr>
<td>63%</td>
<td>62%</td>
</tr>
</tbody>
</table>
I enjoy trying different foods and tasting different seasonings. Cooking is a very creative outlet for me.”

“I like to get recommendations. Based on who is recommending, I can determine if I will like it too.”

“I love food and making food that others love.”
# Generational Recipes

## Whisk Taker
- Like to experiment: 79% (M) vs. 78% (B)
- Cooking is a creative outlet: 77% (M) vs. 76% (B)
- I’m a “foodie”: 62% (M) vs. 51% (B)
- Change food seasonally: 58% (M) vs. 65% (B)

## Nutritionistas
- Go out of my way to make sure I/my family eat healthy: 63% (M) vs. 76% (B)
- Look for natural/organic ingredients: 55% (M) vs. 42% (B)

## Comfort Foodies
- Comfortable with brands familiar with: 72% (M) vs. 72% (B)
- Find a brand I trust and stick with it: 70% (M) vs. 74% (B)

## Taste Maker
- Likely to try based on recommendation: 78% (M) vs. 75% (B)
- People come to me for advice on products/recipes: 52% (M) vs. 52% (B)

## Meal & Dealer
- Buy when have coupon: 64% (M) vs. 69% (B)
- Tend to buy based on price: 63% (M) vs. 43% (B)

Q: For each of the statements below, please rate how much you agree/disagree that each statement describes you.

Note: Bold numbers represent statistically significant difference.
Q: Please indicate which of the following sources has the most influence on your purchase decisions for food and entertaining products and which has the least influence.
**Media Ingredients**

Top Reasons Millennials Turn to Media for Food Information

**Print + Digital provide:**

- Information on different food products/recipes to experiment with
- Information to help me/my family eat healthier
- Information to make creative meals
- Information on the latest health, diet and nutrition trends in food
- Good ideas for entertaining with food

---

**Print**

- Contains food ads I find interesting
- Provides coupons
- Influences me to buy based on quality, not price
- Provides me with information to make cooking less of a chore
- Provides information on latest health, diet and nutrition trends

**Digital**

- Allows me to research before buying
- Encourages me to share opinions by posting reviews and ratings online
- Provides information about food product pricing
- Helps me find brands I can trust
- Provides recommendations that influence me to try a food product

---

Q: We want to understand how well print magazines and online sources deliver information, tips and ideas for food, recipes and entertaining. Please indicate which source/sources provide each of the following.
There’s Power in Print

2/3 of Millennials Take Action After Seeing Food Product/Recipe/Idea in Print

Q: Which of the following have you done in the past month after seeing a food product/recipe/idea in a print magazine?

- Save article/ad to do/use later
- Go to store and buy
- Discuss with others
Ready, Set, Shop

Actions Taken by Millennials Online During Past Week

Online Before She Shops

> Look at recipes 48%
> Look for coupons 43%
> Look for sales 35% (L)
> Look for promotions 28%
> Compare prices 26%
> Create online shopping list 21%
> Search for reviews 19%
> Watch how-to video 16% (T)

Online While She Shops

> Look for coupons 29%
> Use grocery list app 25%
> Look for sales 21%
> Look at recipes 20%
> Search for nutrition info 17%
> Watch a recipe video 13%
> Search for reviews 13%
> Participate in in-store promotion/text to win 11% (L)
> Use mobile payment app 9%

Q: Before shopping for food, which of the following have you done in the past week?

Q: During any shopping trip for food in the past week, which of the following have you done on your smartphone while you were in the store?
# Digital Actions Across Generations

## Actions Taken Online During Past Week

**Do online before shopping:**

<table>
<thead>
<tr>
<th>Action</th>
<th>Millennials</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Look at recipes</td>
<td>48%</td>
<td>42%</td>
</tr>
<tr>
<td>Look for coupons</td>
<td>43%</td>
<td>46%</td>
</tr>
<tr>
<td>Look for sales</td>
<td>35%</td>
<td>29%</td>
</tr>
<tr>
<td>Look for promotions</td>
<td>28%</td>
<td>21%</td>
</tr>
<tr>
<td>Compare prices</td>
<td>26%</td>
<td>17%</td>
</tr>
<tr>
<td>Create online shopping list</td>
<td>21%</td>
<td>15%</td>
</tr>
<tr>
<td>Watch how-to video</td>
<td>16%</td>
<td>6%</td>
</tr>
</tbody>
</table>

**Do online while shopping:**

<table>
<thead>
<tr>
<th>Action</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Look for coupons</td>
<td>29%</td>
<td>21%</td>
</tr>
<tr>
<td>Use a grocery list app</td>
<td>25%</td>
<td>18%</td>
</tr>
<tr>
<td>Look for sales</td>
<td>21%</td>
<td>12%</td>
</tr>
<tr>
<td>Look at recipes</td>
<td>20%</td>
<td>9%</td>
</tr>
<tr>
<td>Search for nutrition info</td>
<td>17%</td>
<td>8%</td>
</tr>
<tr>
<td>Watch recipe video</td>
<td>13%</td>
<td>6%</td>
</tr>
<tr>
<td>Search for reviews</td>
<td>13%</td>
<td>4%</td>
</tr>
<tr>
<td>Participate in in-store promotion/text-to-win</td>
<td>11%</td>
<td>3%</td>
</tr>
<tr>
<td>Use a mobile payment app</td>
<td>9%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Q: Before shopping for food, which of the following have you done in the past week?
Q: During any shopping trip for food in the past week, which of the following have you done on your smartphone while you were in the store?

Note: Bold numbers represent statistically significant difference.
### Superfoodies
**How Millennials Have Shared Food Tips and Tricks**

<table>
<thead>
<tr>
<th><strong>Chat</strong></th>
<th><strong>Use a product/tell friends/family about it</strong></th>
<th>48%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Share tips/tricks in person/over phone</strong></td>
<td>31%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Review</strong></th>
<th><strong>Rate/review/recommend specific products online</strong></th>
<th>16%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Use a product/then review online</strong></td>
<td>14%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Post</strong></th>
<th><strong>Use a product then post about it on Facebook</strong></th>
<th>25%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Share/post tips/tricks on Pinterest</strong></td>
<td>24%</td>
</tr>
<tr>
<td></td>
<td><strong>Share/post tips/tricks on Facebook</strong></td>
<td>22% (L)</td>
</tr>
<tr>
<td></td>
<td><strong>Use a product then post about it on Instagram</strong></td>
<td>21%</td>
</tr>
<tr>
<td></td>
<td><strong>Use a product then post about it on Pinterest</strong></td>
<td>20%</td>
</tr>
<tr>
<td></td>
<td><strong>Share/post a video w/tips/tricks</strong></td>
<td>13%</td>
</tr>
</tbody>
</table>

Q: We’d like to understand how much you share food, recipe and entertaining tips, ideas, inspiration and product information with others. Which of the following have you done in the past month?
Key Food Takeaways: Millennials

- **She experiments and views cooking as an outlet** - find ways to inspire her and show how your brand can be an extension of herself.

- **Magazines Websites, Social Media & Print are above average purchase influencers** - make them key part of your marketing mix.

- **Heavy online researchers** - ensure your site is full of content and ideas that inspire her.

- **Mobile utilized in-store** - understand what she is doing and build in-store promotions accordingly.

- **Price/budget conscious** - use digital for coupons and provide her with opportunity to try your brand and save money.
Key Food Takeaways: Generations

> Millennials are the most engaged generation in the category

> Millennials are more likely than Boomers to:
  - Say they are a “foodie”
  - Look for natural/organic ingredients
  - Do research before buying food products
  - Share opinions about food by posting online reviews and ratings
  - Be digitally connected before and during shopping

> Millennials are less likely to go out of their way to ensure they/their family eat healthy than Boomers

> All generations
  – Share food product/recipe by telling their friends or family about it
  – Believe food is an important part of entertaining
Home Is Where the Heart Is

68% of Millennials think about, research and discuss HOME

Q: Thinking about the home category, how engaged, that is how much do you think about, discuss and research this category?
Meet the Millennial Nester

**Home Sweet Home**
- 79% My home is a reflection of me
- 76% Want home to be a place where my kids and their friends like to gather

**Shelf Expression**
- 75% Like to decorate/do home improvement projects
- 69% Like to experiment with things to update the look of home
- 52% I change my décor seasonally

**Home Security**
- 70% Feel comfortable with products made by brands I'm familiar with
- 65% Find brands I trust and stick with them

**Homing In**
- 67% Research as much as possible before buying
- 55% Frequently recommend products to others

Q: For each of the statements below, please rate how much you agree/disagree that each statement describes you.
“Bigger purchases I'll research because I want to find the best product for the best deal. Smaller ones I just research to see what I like the most”

“When someone enters my home they are getting a very good glimpse of me as a person”

“I love having friends and family over, so I hope to keep my home as a gathering place as my kids get older”
## Hitting Home

### Home Sweet Home
- **My home is reflection of me**
  - **Millennials:** 79%
  - **Boomers:** 78%
- **Want home to be place where my kids and their friends like to gather**
  - **Millennials:** 76%
  - **Boomers:** 74%

### Shelf Expression
- **Like to decorate/do home improvement projects**
  - **Millennials:** 75%
  - **Boomers:** 68%
- **Like to experiment with things to update look of home**
  - **Millennials:** 69%
  - **Boomers:** 60%
- **I change my décor seasonally**
  - **Millennials:** 52%
  - **Boomers:** 36%

### Home Security
- **Feel comfortable with products made by brands I’m familiar with**
  - **Millennials:** 70%
  - **Boomers:** 68%
- **Find brands I trust and stick with them**
  - **Millennials:** 65%
  - **Boomers:** 72%

### Homing In
- **Research as much as possible before buying**
  - **Millennials:** 67%
  - **Boomers:** 57%
- **Frequently recommend products to others**
  - **Millennials:** 55%
  - **Boomers:** 48%

Q: For each of the statements below, please rate how much you agree/disagree that each statement describes you. Note: Bold numbers represent statistically significant difference.
Q: Please indicate which of the following sources has the most influence on your purchase decisions for home products and which has the least influence.
Home 411

Top Reasons Millennials Turn to Media for Home Information

Print + Digital provide:

> Ideas/information on decorating/home improvement projects
> Information on new ways to update the look of my home
> Information to help me keep my home on trend
> Ideas to help me change my décor seasonally
> Information to help me clean and organize my house

Print

> Contains ads I find interesting
> Influences me to buy based on quality, not price
> Gives me ideas to help change my décor seasonally
> Entices me with information so I spend more money than I expected to
> Provides me with information on new ways to update the look of my home

Digital

> Allows me to research before buying
> Encourages me to share my opinions by posting reviews and ratings online
> Provides information about product pricing
> Helps me find brands I can trust
> Provides me with information to make me more knowledgeable

Q: We want to understand how well print magazines and online sources deliver information, tips and ideas for the home. Please indicate which source/sources provide each of the following.
There’s Power in Print

2/3 of Millennials Take Action After Seeing Home Product/Idea in Print

Q: Which of the following have you done in the past 3 months after seeing a product/idea for the home in a print magazine?
Ready, Set, Shop!

Actions Taken by Millennials Online During Past Three Months

**Online Before She Shops**
- Compare prices 51% (L)
- Look for sales 48%
- Search for reviews 43%
- Look for coupons 41%
- Look for promotions 38% (L)
- Compare products/features 36%
- Watch how-to video 19%
- Use online shopping list 18%

**Online While She Shops**
- Look for coupons 31%
- Search for reviews 25%
- Look for sales 22%
- Search for home décor ideas 21%
- Look up if need additional materials/tools 21%
- Watch how-to video 14%
- Participate in in-store promotion/text to win 14%
- Use mobile payment app 12%

Q: Before shopping for products for the home, which of the following have you done in the past 3 months?
Q: During any shopping trip for products for the home in the past 3 months, which of the following have you done on your smartphone while you were in the store?
# Digital Actions Across Generations

## Actions Taken Online During Past Three Months

### Do online before shopping:

<table>
<thead>
<tr>
<th>Action</th>
<th>Millennials</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compare prices</td>
<td>51%</td>
<td>48%</td>
</tr>
<tr>
<td>Look for sales</td>
<td>48%</td>
<td>49%</td>
</tr>
<tr>
<td>Search for reviews</td>
<td>43%</td>
<td>44%</td>
</tr>
<tr>
<td>Look for coupons</td>
<td>41%</td>
<td>39%</td>
</tr>
<tr>
<td>Look for promotions</td>
<td>38%</td>
<td>37%</td>
</tr>
<tr>
<td>Compare products/features</td>
<td>36%</td>
<td>39%</td>
</tr>
<tr>
<td>Watch how-to video</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>Use online shopping list</td>
<td>18%</td>
<td>9%</td>
</tr>
</tbody>
</table>

### Do online while shopping:

<table>
<thead>
<tr>
<th>Action</th>
<th>Millennials</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Look for coupons</td>
<td>31%</td>
<td>22%</td>
</tr>
<tr>
<td>Search for reviews</td>
<td>25%</td>
<td>15%</td>
</tr>
<tr>
<td>Look for sales</td>
<td>22%</td>
<td>20%</td>
</tr>
<tr>
<td>Search for home décor ideas</td>
<td>21%</td>
<td>11%</td>
</tr>
<tr>
<td>Look up if need additional materials/tools</td>
<td>21%</td>
<td>9%</td>
</tr>
<tr>
<td>Watch how-to video</td>
<td>14%</td>
<td>7%</td>
</tr>
<tr>
<td>Participate in in-store promotion/text-to-win</td>
<td>14%</td>
<td>5%</td>
</tr>
<tr>
<td>Use a mobile payment app</td>
<td>12%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Q: Before shopping for products for the home, which of the following have you done in the past 3 months?
Q: During any shopping trip for products for the home in the past 3 months, which of the following have you done on your smartphone while you were in the store?

Note: Bold numbers represent statistically significant difference.
## Home Buzz Builders

### How Millennials Have Shared Home Tips and Tricks

<table>
<thead>
<tr>
<th>Chat</th>
<th>Use a product/tell friends/family about it 45%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Share tips/tricks in person/over phone 26%</td>
</tr>
<tr>
<td></td>
<td>Rate/review/recommend specific products online 20%</td>
</tr>
<tr>
<td></td>
<td>Use a product/then review online 19%</td>
</tr>
<tr>
<td></td>
<td>Share/post tips/tricks on Pinterest 22%</td>
</tr>
<tr>
<td></td>
<td>Use a product then post about it on Facebook 19%</td>
</tr>
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<td></td>
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</table>

Q: We’d like to understand how much you share tips, ideas, inspiration and product information for the home with others. Which of the following have you done in the past 3 months?
Key Home Takeaways: Millennials

> **She enjoys making home improvements and updates** - provide ideas and inspiration to help her make her home a comfortable space to share with others.

> **She is heavily influenced by visuals when it comes to home purchase decisions** - ensure your marketing messages are visual in nature.

> **Both magazines and online sources play a key role** in providing her with information, inspiration and ideas for home décor and improvement. Make them part of your marketing mix.

> **Mobile utilized in-store** - provide her with product information, videos, coupons and more at point-of-purchase.
Key Home Takeaways: Generations

> All generations are engaged with the category – almost equally thinking, researching and discussing it

> Millennials are more likely than Boomers/GenX to:
  - Decorate/do home improvement projects
  - Update the look of their home
  - Change their décor seasonally
  - Research before buying products for their home
  - Share information with others via online channels
  - Use smartphone during shopping

> Millennials, like Boomers:
  - Feel their home is a reflection of themselves and want it to be a gathering place for family and friends
  - Go online to do research, compare prices, look for sales and product reviews (Millennials are more likely to make shopping lists)
Marketing Implications

What can marketers be doing to reach Millennials?

> **Join Her Social Circle**
  Become a part of the magazines she’s reading, coupons she’s scanning on her smartphone or posts she’s sharing on social sites and apps

> **Keep It Simple**
  Anything complicated won’t work. She needs to see it and get it immediately - she won’t take the time to try and understand what you are trying to communicate.

Where will they be shopping and buying?

> **Follow Her**
  Make your products accessible 24/7, online and off. Offer variety, peer reviews and quick and easy shopping and payment options.

> **Keep Evolving**
  Keep things interesting by changing/evolving, or she will be the first one to leave for the newest and best offerings by your competitors. Products, brands and content geared to variety, change and the “next best thing” will peak her interest online and in print.
2020 Strategies & Tactics

How can marketers motivate and align with Millennials?

> **Satisfy Her Cravings**
  Sharing is part of her DNA. Provide her with brand new, bite-sized pieces of information and inspiration, making it easy for her to share.

Who and what are her top influencers?

> **Keep it Real**
  As an early adopter she wants to hear, see and share it first - but is only willing to take advice from those she admires and trusts. Deals, steals and celebrity endorsements can go a long way, but authenticity is key.

> **Stimulate Her Senses**
  She craves sensorial stimulation. The more you can appeal to her senses, the more likely you are to draw her to your offerings.