

THE AUDIENCE YOU CAN'T AFFORD TO IGNORE



ENDERS ANALYSIS





What we did...





And we are not the only ones talking about this...

"young people feel squeeze as pay divide widens"

The Metro - Feb '14

"life begins at 45 when people are most content"

The Telegragh - May '14

"under 30s feel the pinch as oldies continue to spend"

Intergenerational Foundation - Jan '14

"Wanted:

Overqualified graduate for unpaid work.

Experience essential"

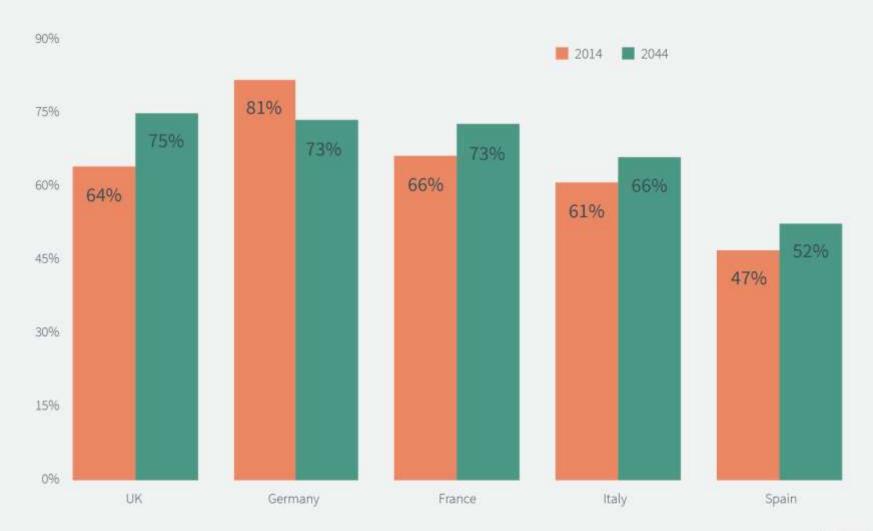
The Guardian - Mar '14

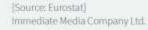


((1'd rather be dead than sing Satisfaction when I'm 45)) Mick Jagger (aged 31)

IMMEDIATE MEDIA

The UK is growing faster than any other major EU country Population (m)

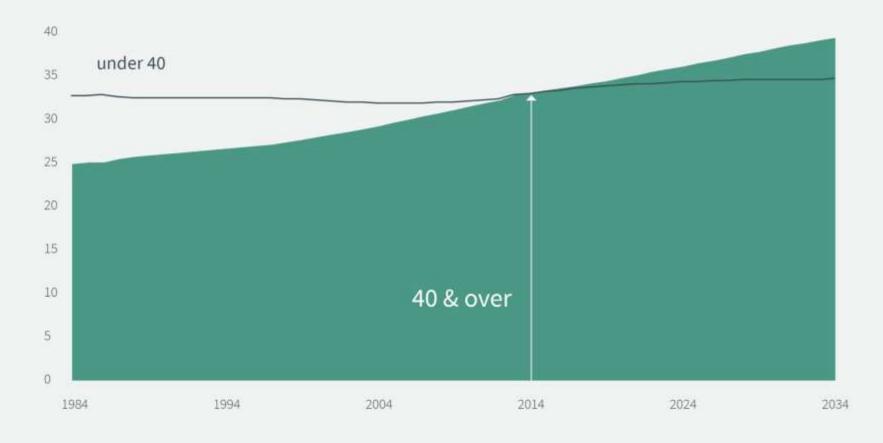




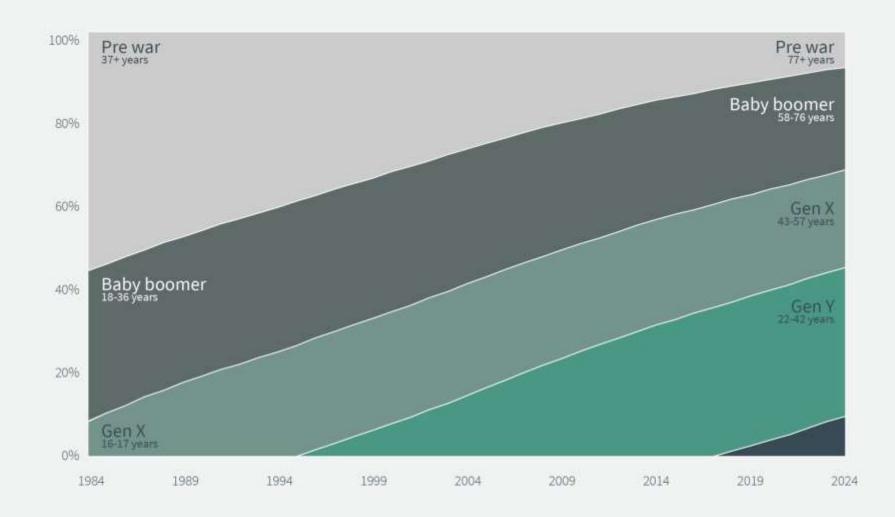




Over-40s will be the majority for the first time this year UK Population (m)

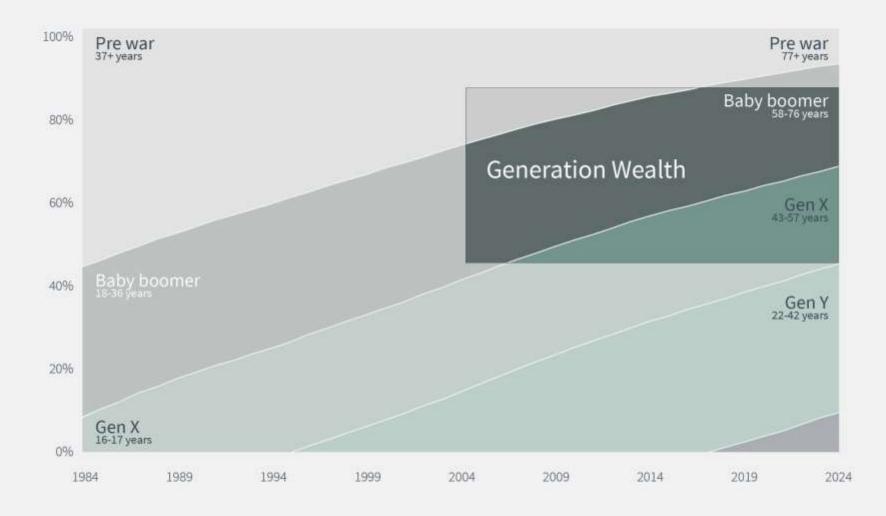


Generational shift Share of 16+ population (%)

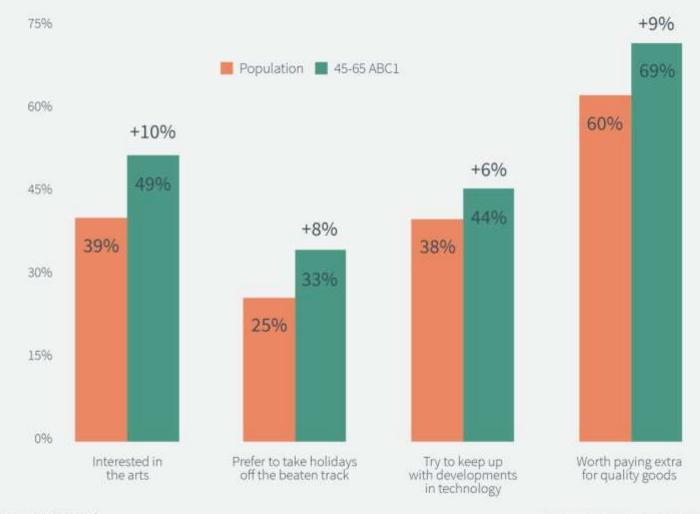




Baby Boomers and Gen Xers are "Generation Wealth" Share of 16+ population (%)

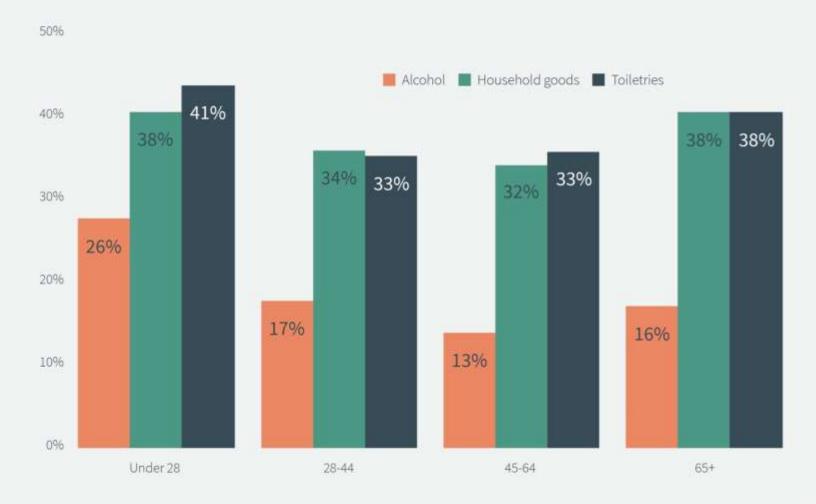


This cohort of 45-65 ABC1s are highly engaged and discerning Agree with statement (% of demographic group)



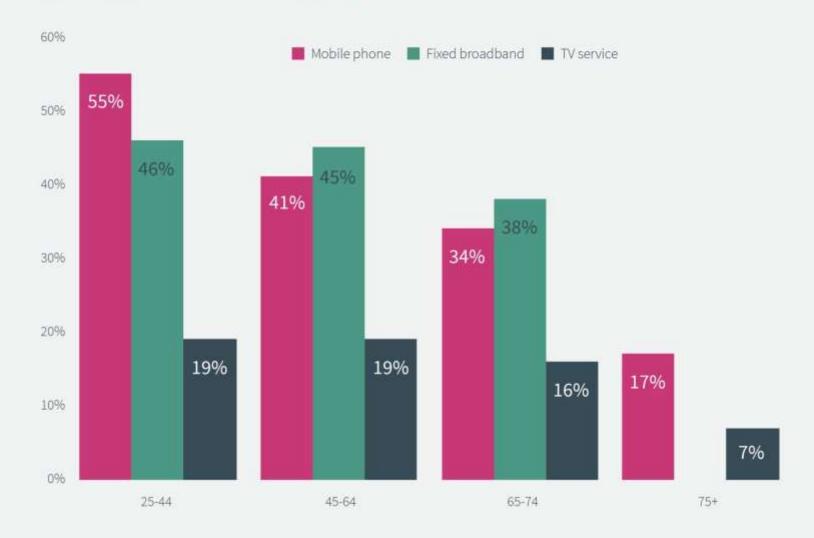


45-65s are consistently less brand loyal than other age groups Average brand loyalty by age of principal buyer (% share of requirements)





45-64s actively switch brands and services Have changed suppliers (% of total in age group)



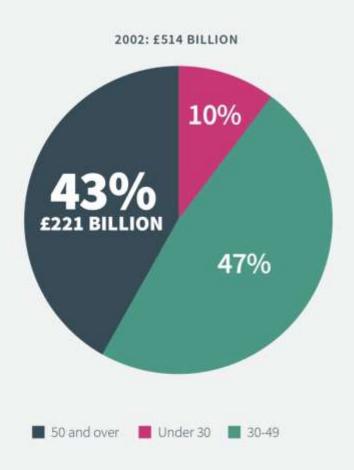


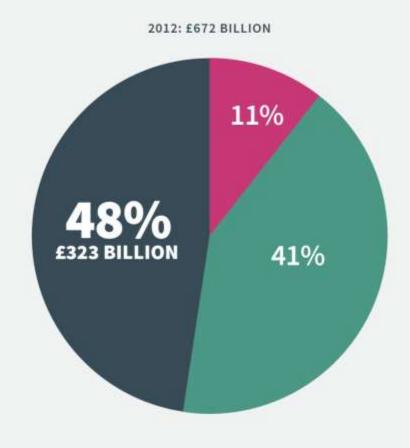
Over-45s have most of the money and spend far more



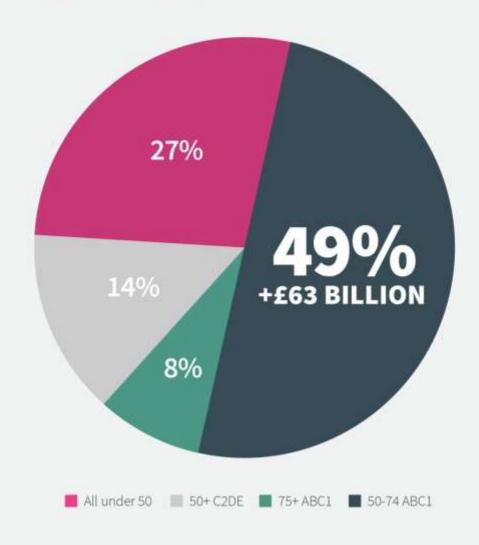


50+ households' expenditure has risen by £100 billion in 10 years Expenditure by age of head of household (% of total)



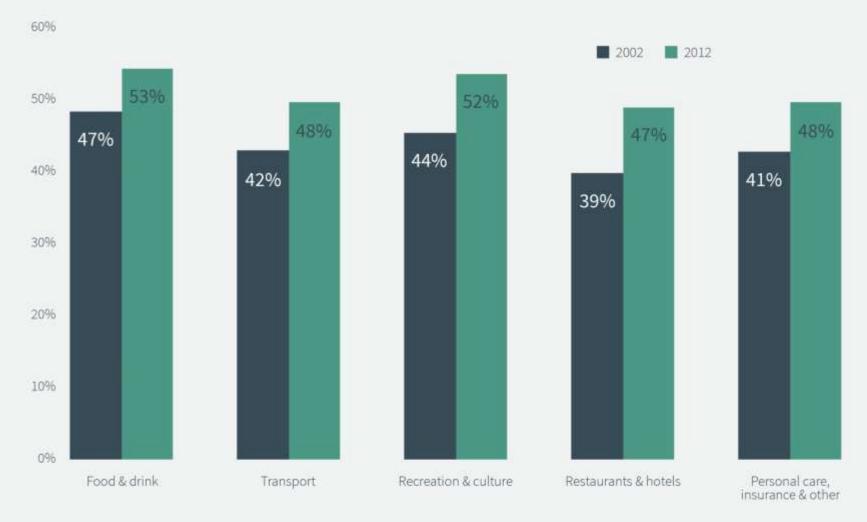


Mature ABC1 households account for half of all growth in consumer spend Share of growth in spend by age/income group of head of household between 2002 and 2012 (%)

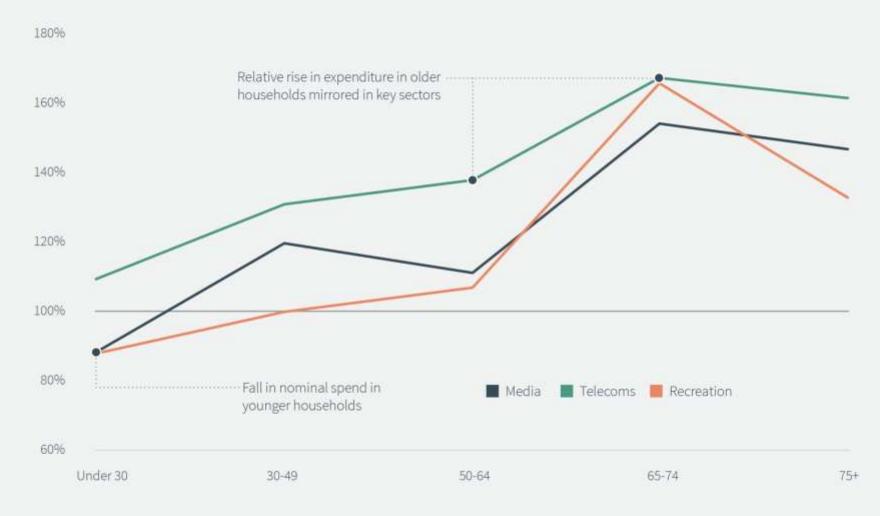




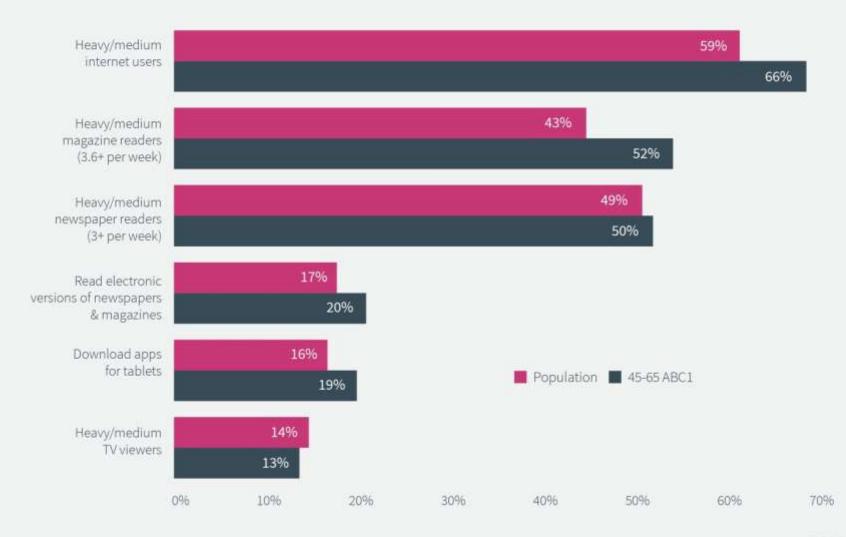
50+ households' share of spend is rising across key categories Share of spend in households with 50+ head of household in top 5 categories (% of total)



Even 'young' sectors are increasingly dominated by mature consumers Ratio of 2012 to 2002 spend on telecoms, recreation and media by age of head of household (%)

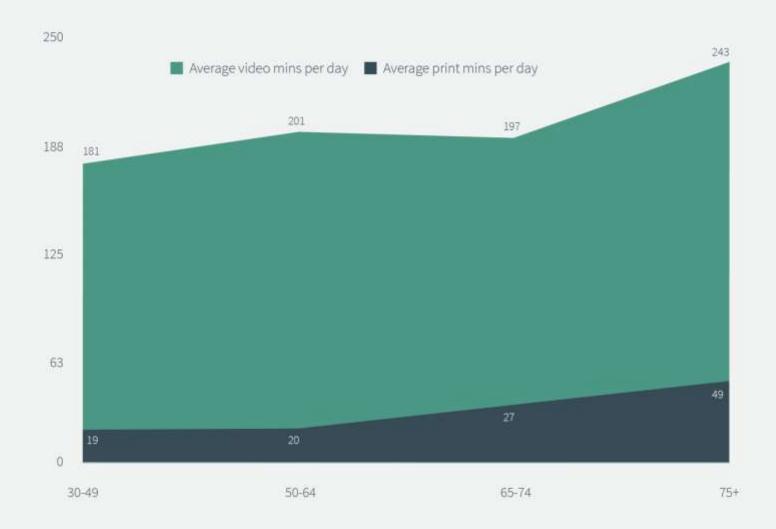


45-65 ABC1s embrace new technology as well as traditional media Media-related activity (% of total)



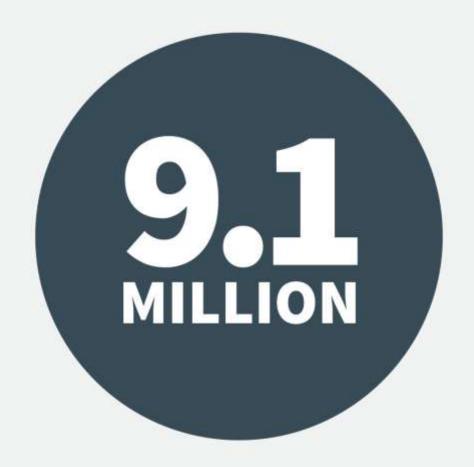


Over-45s spend more time consuming 'brand' media Video and print consumption, by age group (minutes per day)





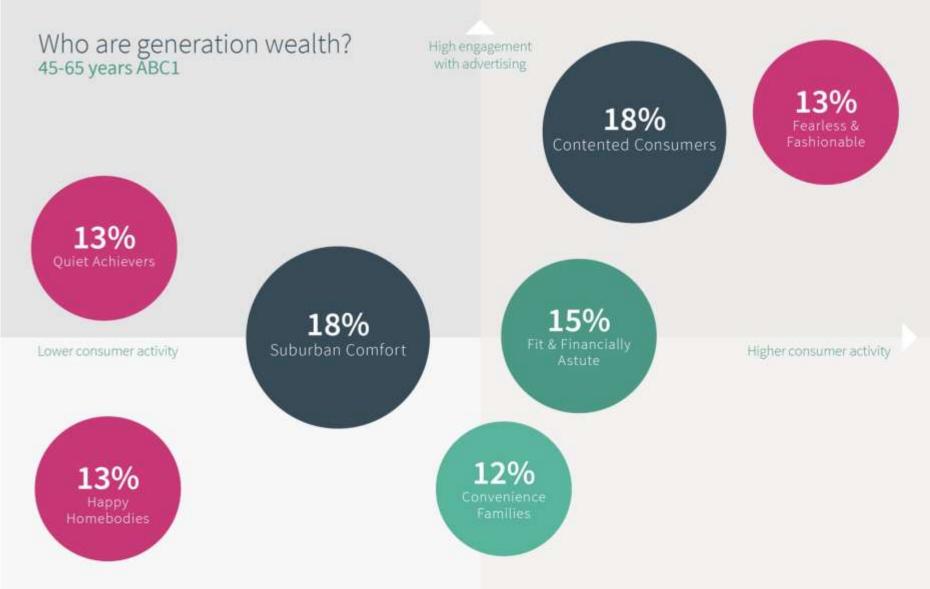
Size of Generation Wealth in the UK





Generation Wealth Segments





All 45-65 year olds in social classes ABC1 (% of target population)

Source: GB TGI 2013 Q4 Base: all adults

lower engagement with advertising





Fit & Financially Astute 1.4 million adults, 15% of this audience

KEY DEMOGRAPHICS

46% 55-64 years old

53% working full time

68% male



'I do some sort of sport or exercise at least once a week'

72%



'Thinking about dependability and reliability, the first thing that comes to mind is Land Rover'

John



Their icon is...
Michel Roux Jr
(b.1960)



Fit & Financially Astute Media usage

INFORMATION GATHERERS

- More resistant to traditional advertising
- Trust reviews in magazines, newspapers and online
- Product placements and advertorials hold more weight





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Contented Consumers 1.6 million adults, 18% of this audience

KEY DEMOGRAPHICS

45% 55-64 years old 35% working full time 59% female



'It is important for me to look well dressed' 68%



'Mary Portas is really the fashion 'grande dame.' She's out there with her style and I'll adapt from that'



'I really enjoy shopping for clothes' 56%



Their icon is...

Kirsty Allsopp

(b.1971)



Contented Consumer Media usage

HOBBY BASED

- Very open to advertising, especially print media
- Magazine advertising and editorial guide their purchasing
- Samples, offers and promotions work well with this segment, they love a bargain



Fearless & Fashionable 1.3 million adults, 13% of this audience

KEY DEMOGRAPHICS

62% 55-64 years old

54% working full time

53% female



'I have keen sense of adventure'

79%



'I like change and I look for it in life. I wasn't going to be left in the past' Beth



'I try to keep up with developments in technology.' 66% compared with 38% avg



Their icon is...

Jude Law

(b.1972)

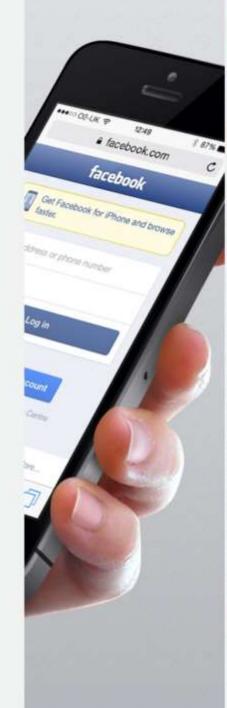
Karen Brady



Fearless & Fashionable Media usage

ASPIRATIONAL OVERLOAD

- Most open to advertising, especially print media
- Engaged by lifestyle advertising, which reflects their lifestyle (or the one they aspire to) back to them
- Turned off by advertising aimed at old people
- Look to magazine for guidance in interiors, cooking, travel and fashion





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Mary Indian

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Engaging with Generation Wealth

- Overlooked by most current marketing
- Attitudes and lifestyle need to inform marketing strategy
- Myth that their brand choices are entrenched
- Focus on the values that appeal to them



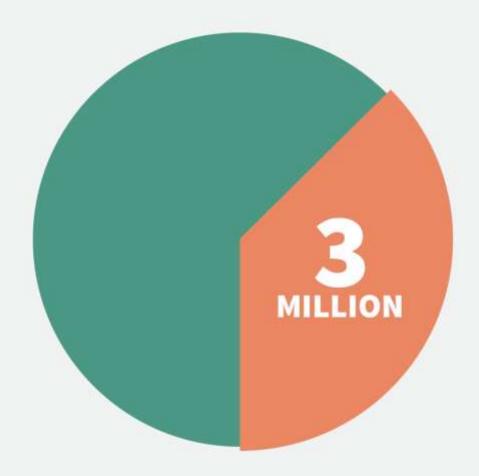


The term I used ages ago was, 'age neutral marketing'

the really clever companies should be, obviously, trying to appeal by and large to a cross spectrum of ages. We all go on holidays, we all fly in planes, we all buy computers, and we all buy Sky or Virgin, or whatever it's going to be. The trick is to do it in such a way that you certainly don't push off generation but you make it as inclusive as you possibly can 99

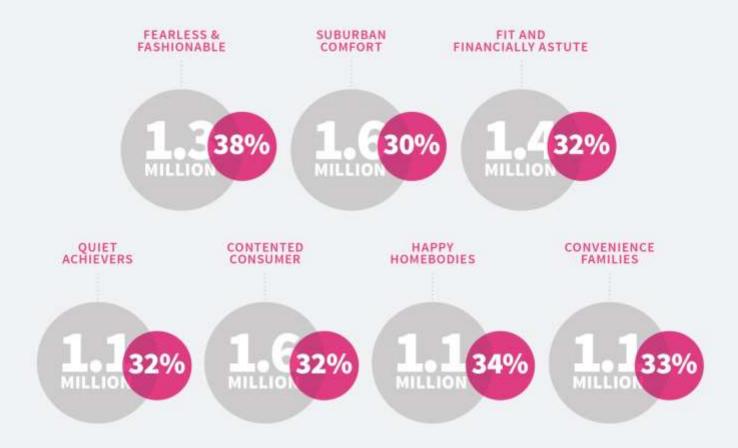


Immediate Media Co reach one third of Generation Wealth





Immediate Media and the Generation Wealth Segments





IMMEDIATE MEDIA^{Cº}



ENDERS ANALYSIS

