ASEAN MILLENNIALS:
One size fits all?

A GENERATION GAP IN ASEAN

Prologue

Millennials. Generation Y.
Whatever you choose to call them, the proposed birthdates are between the early 1980s and around 2000.

They are the generation that has in recent years been under the marketing spotlight.
No other generation has received this much marketing attention.
But have we got it right?

The mistake would be to view this demographic cohort as monolithic.

This study will show that there are differences among what we generally term as Millennials in ASEAN.
Social, historical, cultural and environmental factors affect the behavioural tendencies of Millennials in the workplace, with technology and their worldview.

The following pages will give you clear snapshots of how diverse Millennials who are born in the 1980s and 1990s are from each other.
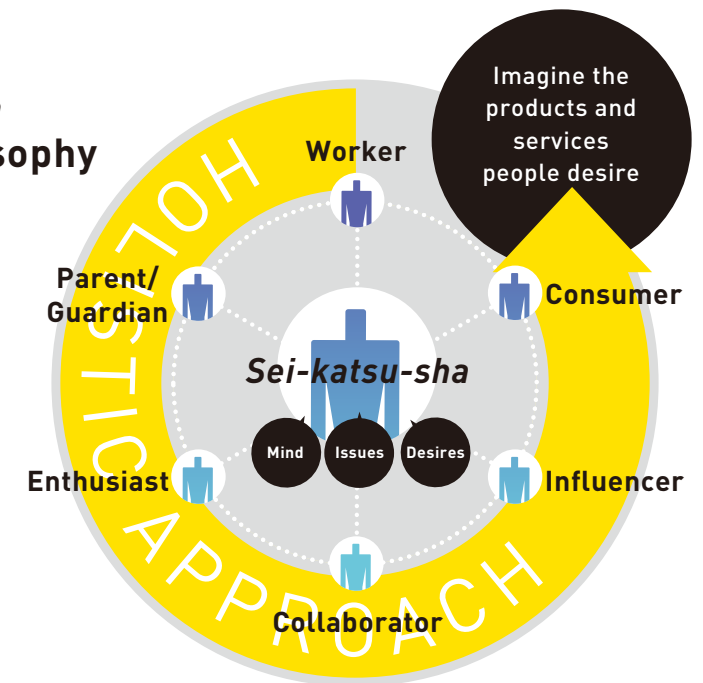
What is
Hakuhodo Institute of Life and Living ASEAN?

A think tank dedicated to studying *sei-katsu-sha*

Hakuhodo Institute of Life and Living ASEAN (HILL ASEAN) was established in 2014 as the Hakuhodo Group's think tank in the ASEAN region.

By studying the new lifestyles of *sei-katsu-sha*—our term for the holistic person—emerging in this region and sharing marketing ideas about them, we hope to to help companies with their marketing efforts in ASEAN countries.

Hakuhodo's *Sei-katsu-sha* Insight philosophy

HOLISTIC APPROACH

Worker

Imagine the products and services people desire

Parent/ Guardian

Consumer

Sei-katsu-sha

Mind   Issues   Desires

Enthusiast

Influencer

Collaborator

At Hakuhodo, we describe people not simply as "consumers" but as *sei-katsu-sha*—fully rounded individuals with their own lifestyles, aspirations, and dreams. "Consumer" is a producer-centric term that refers only to one facet of people's lives. Human beings don't exist solely to consume. They do much more than just shop. They are workers, residents, citizens, somebody's son or daughter, and perhaps also a parent. At Hakuhodo, we use the term *sei-katsu-sha* to go beyond the consumer to understand the whole person and develop marketing approaches based on their true desires.

# Why study ASEAN *sei-katsu-sha*?

The formation of the AEC (ASEAN Economic Community) has given further impetus to the flow of people and goods within the region and heightened interest in ASEAN as one big market.

ASEAN is a patchwork of countries that differ in language, religion, and cultural background. However, identifying commonalities among ASEAN *sei-katsu-sha* that transcend these differences makes it possible for us to gain a bird's eye view of the entire ASEAN market.

Determining what ASEAN *sei-katsu-sha* have in common also serves as a useful yardstick for understanding how each country differs.
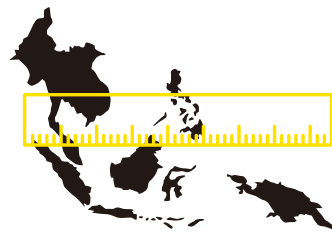
1
Gain a bird's-eye view of the overall ASEAN market as it becomes more integrated through the AEC
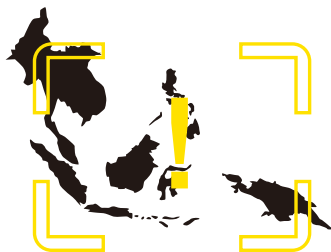
2
Understand what makes each country's *sei-katsu-sha* distinctive

How does each generation see themselves? Taking a bird's eye vs. a bug's eye view

Bird's eye view

ASEAN Fixed Point Survey

Method	In-home survey
Target population	Male and female *sei-katsu-sha* aged 15–59 in SEC categories A–D
Areas covered	Singapore, Kuala Lumpur (Malaysia), Bangkok and Nakhon Ratchasima (Thailand), Jakarta and Surabaya (Indonesia), Hanoi and Ho Chi Minh City (Vietnam), Yangon (Myanmar), Manila (Philippines)
Sample size	8,100 samples (900 in each country)
Allocation	In line with the demographic structure in each country
Conducted by	Tokyo Survey Research
Date	December 2015 to January 2016

Bug's eye view

In-home interviews on the generation gap

Target population	*Sei-katsu-sha* in SEC categories A–C
Areas covered	Singapore, Kuala Lumpur (Malaysia), Bangkok (Thailand), Jakarta (Indonesia), Ho Chi Minh City (Vietnam), Manila (Philippines)
Families visited	37 total
Conducted by	Tokyo Survey Research
Date	August 2016

Interviews and observations of *sei-katsu-sha* born in the 1970s, 1980s, and 1990s

Understanding generation gaps: 1970s- vs. 1980s- vs. 1990s-born

ASEAN Millennials in the spotlight

Who are the Millennials?

MILLENNIALS

- The word "millennial" refers to the fact that these *sei-katsu-sha* began to come of age around the year 2000

- Generally born in the 1980s and 1990s, Millennials overlap with Generation Y

- In terms of age, they are those currently between about 17 and 36 years old

- "Millennial" has become a global buzzword for "young people today"

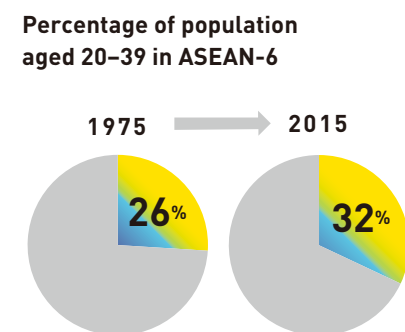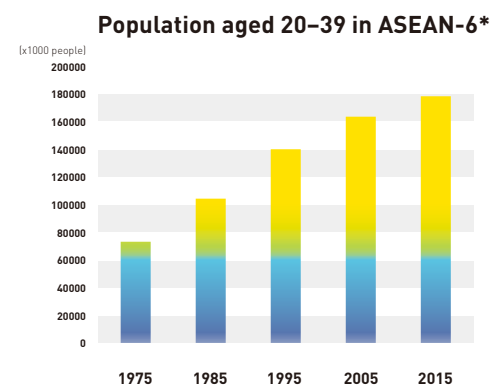## Why have they captured the world's attention?

- Millennials are very different from the previous generations, particularly in terms of their fresh values and high degree of fluency in digital technology

- Millennials are notoriously difficult to reach with traditional marketing approaches

- Social media is often cited to have a major influence on them

This generation makes up a third of the population in ASEAN

- Millennials are particularly important in ASEAN countries, whose populations have a high percentage of young people
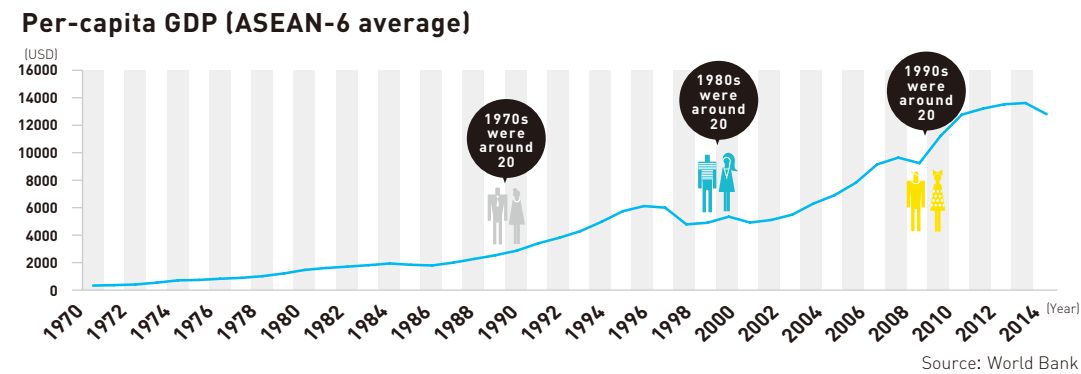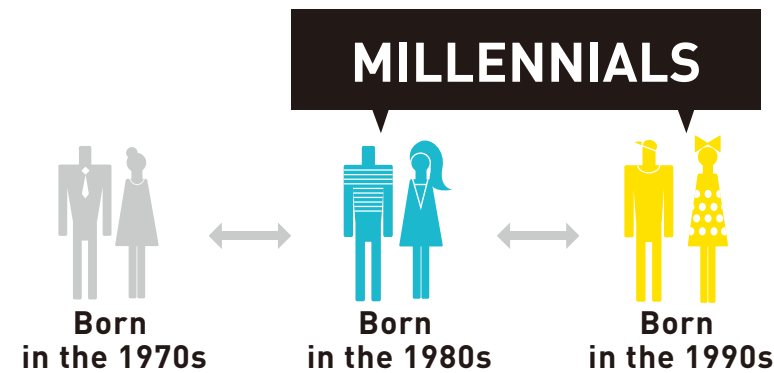
Population aged 20–39 in ASEAN-6*

[x1000 people]
200000
180000
160000
140000
120000
100000
80000
60000
40000
20000
0

1975 1985 1995 2005 2015

Percentage of population aged 20–39 in ASEAN-6

1975 → 2015

26%   32%

Source: UN Department of Economic and Social Affairs   *ASEAN-6 includes Singapore, Malaysia, Thailand, Indonesia, Vietnam, and the Philippines

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ASEAN *sei-katsu-sha* born in the 1980s and 1990s—are they same generation?

At HILL ASEAN, we divide Millennials into those born in the 1980s and those born in the 1990s, analyzing them while using those born in the 1970s as a benchmark to identify the relative differences among the generations.

Does lumping people aged 17 to 36 together in one generation in ASEAN, which has had so many developing countries undergo dramatic socio-economic shifts in the recent years, not present any problems?

MILLENNIALS

Born in the 1970s ⟷ **Born in the 1980s** ⟷ **Born in the 1990s**

Per-capita GDP (ASEAN-6 average)

[USD]
16000
14000
12000
10000
8000
6000
4000
2000
0

1970 1972 1974 1976 1978 1980 1982 1984 1986 1988 1990 1992 1994 1996 1998 2000 2002 2004 2006 2008 2010 2012 2014 [Year]

1970s were around 20
1980s were around 20
1990s were around 20

Source: World Bank

1970s-, 1980s-, and 1990s-born have different mindsets (%)	1970s	1980s	1990s
Life will get better in the future	49	54	59
No resistance to working abroad	25	29	33
I want freedom	18	22	29
Want to spend more time on Internet	14	20	31
Purchase decision whether the product is good or bad	60	54	48

Source: ASEAN fixed point survey 2016

How does historical context shape the values of a generation?

Survey procedure

Show subjects a historical timeline of events in their country

Have them point out the ones that have impacted their own thoughts and behaviors

Survey insights

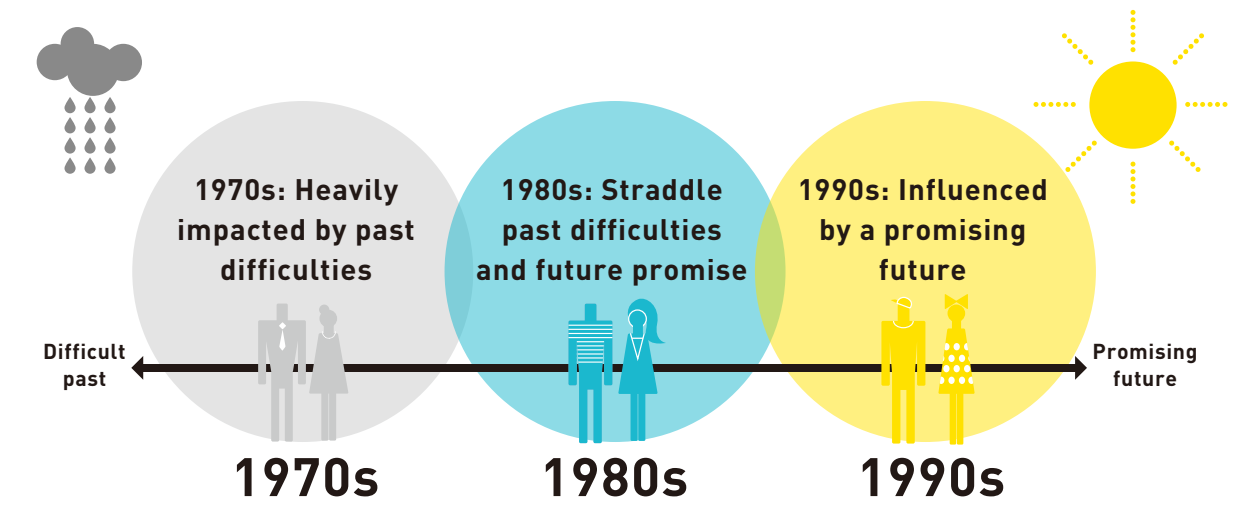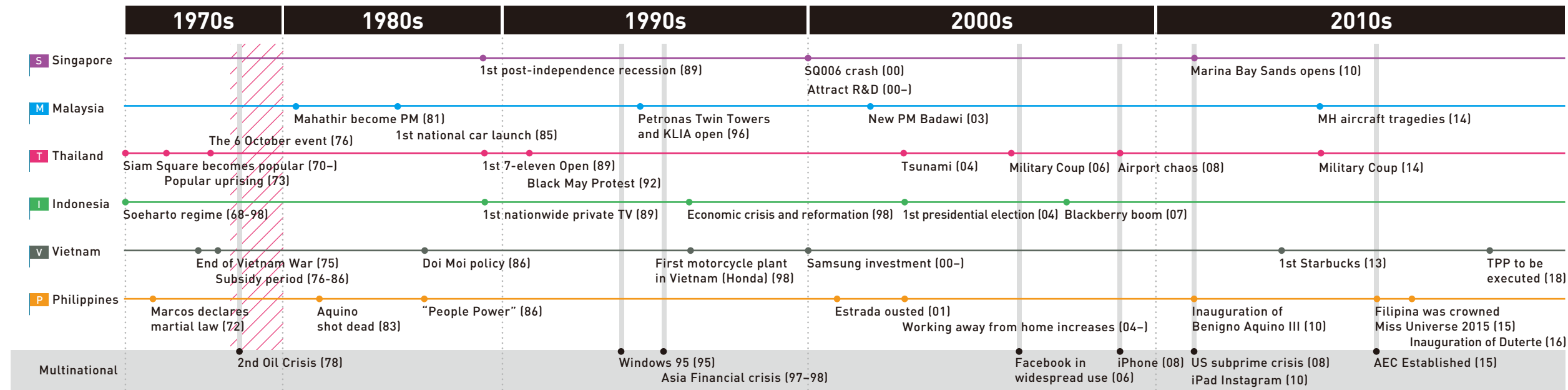**Different historical events impacted those born in the 1970s, 1980s, and 1990s.**

1970s — Past difficulties greatly impacted those born in the 1970s.

1980s — Those born in the 1980s have been affected by both the difficulties of the past and hopes for the future.

1990s — In contrast, those born in the 1990s have primarily been affected by current events and those that indicate future promise.

How does historical context shape the values of a generation?

	1970s	1980s	1990s	2000s	2010s
S Singapore			1st post-independence recession (89)	SQ006 crash (00) Attract R&D (00–)	Marina Bay Sands opens (10)
M Malaysia	The 6 October event (76)	Mahathir become PM (81) 1st national car launch (85)	Petronas Twin Towers and KLIA open (96)	New PM Badawi (03)	MH aircraft tragedies (14)
T Thailand	Siam Square becomes popular (70–) Popular uprising (73)	1st 7-eleven Open (89) Black May Protest (92)		Tsunami (04) Military Coup (06) Airport chaos (08)	Military Coup (14)
I Indonesia	Soeharto regime (68–98)	1st nationwide private TV (89)	Economic crisis and reformation (98) 1st presidential election (04) Blackberry boom (07)		
V Vietnam	End of Vietnam War (75) Subsidy period (76-86)	Doi Moi policy (86)	First motorcycle plant in Vietnam (Honda) (98) Samsung investment (00–)		1st Starbucks (13) TPP to be executed (18)
P Philippines	Marcos declares martial law (72)	Aquino shot dead (83) "People Power" (86)	Estrada ousted (01) Working away from home increases (04–)	Inauguration of Benigno Aquino III (10)	Filipina was crowned Miss Universe 2015 (15) Inauguration of Duterte (16)
Multinational	2nd Oil Crisis (78)		Windows 95 (95) Asia Financial crisis (97–98)	Facebook in iPhone (08) widespread use (06) US subprime crisis (08) iPad Instagram (10)	AEC Established (15)

1970s: Heavily impacted by past difficulties

1980s: Straddle past difficulties and future promise

1990s: Influenced by a promising future

Difficult past ← → Promising future

1970s   **1980s**   **1990s**

1970s

1978: Age 6
Postwar austerity
with rice shortages
(Vietnam 1972)

1989: Age 15
First commercial TV
broadcast is a
sensation
(Indonesia 1974)

1998: Age 24
Toughened up by
surviving the
economic crisis
(Indonesia 1974)

1998: Age 25
Bought the
first-generation
Honda Super
Dream, still uses it
(Vietnam 1973)

2006: Age 31
Air Asia makes it possible to
travel the world
(Malaysia 1975)

1980–90: Age 4–14
Country under martial
law, but too young to
remember
(Philippines 1976)

1998: Age 19
Economic crisis
meant leaving the
family business to get
a company job
(Thailand 1979)

2002: Age 28
Could not return from the
US because of the SARS
outbreak
(Singapore 1974)

Deeply affected by the hardships of the past

1980s

1998: Age 14
Parents were often
working far from home
due to the economic
crisis; decided that
family time was very
precious (Malaysia 1984)

1998: Age 10
Parents lost their jobs
in the economic crisis;
decided on a steady
mechanical
engineering major
(Malaysia 1988)

2003: Age 15
Got first cell phone
(Indonesia 1988)

2009: Age 27
Left job with an airline cabin crew to get a
master's degree due to the economic crisis
(Singapore 1982)

2008: Age 26
Airport chaos caused a break in income
from airport job, started a side business
(Thailand 1982)

Have memories of the hardships of the past, but also affected by the digital revolution that occurred once they came of age

1990s

1998: Age 5
Moved somewhere far
away because of the
economic crisis, but
too young to remember
(Thailand 1993)

2009: Age 16
Got first smartphone
in high school
(Thailand 1993)

2013: Age 17
Inspired by a famous startup
hero to become an entrepreneur
(Indonesia 1996)

2010: Age 15
First encountered smartphones
as a high school student, was a
life-changing experience
(Vietnam 1995)

2011: Age 18
Learned about the AEC at university
and aspired to be an internationally
competitive architect
(Thailand 1993)

2018: Age 23
Felt opportunities
open up as a
result of the TPP
(Vietnam 1995)

Influenced by technology's widespread and critical presence in their lives as well as future events that have shaped their future potential

How have historical events made the 1970s-, 1980s-, and 1990s-born generations in ASEAN live and work differently?

Distinctive differences in how 1970s-, 1980s-, and 1990s-born *sei-katsu-sha* live and work

1970s

1980s

1990s

as well as from extensive support from their parents' generation

Impact of difficult experiences from economic crisis and political upheaval

Impacted by both a difficult past and a promising future

Impacted by expanded possibilities from digitalization and globalization

Want safety, stability, and peace of mind

Having experienced economic crisis and political upheaval, they make safe, reassuring choices

Life was tough after the war. Focuses more on saving than spending, because it's important to always be prepared as you never know what will happen. (Vietnam)

Parents' company fell apart during the economic crisis, so opted for a university job with a steady income. (Bangkok)

Want to use different facets of themselves in their professional and personal lives

Indirectly experienced economic crisis and political upheaval, so they use multiple facets of their personalities to create more meaning in their professional and personal lives within an unpredictable world

Has a separate home in the city, because he thinks it's important to separate personal time and family time. (Bangkok)

Opened a café as an extension of her hobbies, and can run it while she raises her kids. (Jakarta)

Plays with his band every Saturday as a hobby, and also sells motorcycle parts and shoes. (Jakarta)

Want to grow while doing what they like, making no distinction between their professional and personal lives

Don't live by other people's rules. Want to express themselves while making a living by doing what they want, learning, and growing at the same time

Quit a company job after a month and opened a shaved ice stand like she wanted. (Bangkok)

Making sweets and fashion are her hobbies, so she started businesses doing both on Instagram. (Kuala Lumpur)

Loves men's skincare, and sells it through Facebook. (Ho Chi Minh City)

Focus on steady career (guarantees over risk)

Past failures make them avoid risk, so they set their sights on steady achievement in their field

Tried to open her own accounting office, but it failed due to the 1997 Asian currency crisis. Now just wants to increase her income by advancing her career as an accountant with a major firm. (Bangkok)

Wants to serve out her time at the company that has treated her well since times were tough economically. (Kuala Lumpur)

Want to limit risks with side businesses (diversify risks and expand opportunities)

Experienced uncertainty in the past, so they use side businesses as insurance against losing everything while waiting for opportunity to strike

Experienced losing his job in the airport chaos, so started farming as a side business. (Bangkok)

Both parents lost their jobs during the the 1997 Asian currency crisis and she had to work while she went to school, so she started a dry cleaning service as a side business. (Bangkok)

You never know what the future will bring, so he bought a car and started working as an Uber driver on the side. (Manila)

Just want to get started (opportunities over risk)

With limitless opportunities opening up before them, they see doing nothing as the biggest risk of all

Believes that not taking on a challenge is the biggest risk you can take, so he's been running a flower shop through Instagram since he was a university student. (Jakarta)

Pearl milk tea was really popular, so she opened her own street stall. (Ho Chi Minh City)

Tried setting up his own business as it seemed like there was a lot of demand for dry cleaning services. (Singapore)

Want secure progress

Experienced hardships in the past, so they have a powerful tendency to choose the secure path and strongly desire safe, reliable upward progress.

Want to flexibly minimize risks and maximize opportunities

Believe that the world is uncertain, and have a strong desire to minimize risk and maximize opportunity, flexibly using multiple facets of themselves for different purposes and adding side businesses to enhance their personal lives as well as their careers.

Simply want to do what they like immediately

For the most part, this group has not experienced hard times, and has instead grown up in a world of expanding opportunity thanks to economic growth in Asia, globalization, and the digital revolution. They see not taking on a challenge as a lost opportunity, so they have a strong desire to start doing what they like right away. As a result, they make no distinctions between their professional and personal lives.

How have historical events made the 1970s-, 1980s-, and 1990s-born generations in ASEAN interact with technology differently?

How 1970s-, 1980s-, and 1990s-born *sei-katsu-sha* interact with technology differently

1970s 👫

Why Instagram?

Were around **30** before first logging into Facebook or getting a smartphone

1980s 👫

Why Snapchat?

Were around **20** before first logging into Facebook or getting a smartphone

1990s 👫

Digital present in everyday life

Were around **10** before first logging into Facebook or getting a smartphone

Digital perspective

How and why they use social media/smartphones

Digital technology is a tool to support real life

Because they came in contact with smartphones/Facebook after they had already established their real-world lives, they see them as no more than tools that support the real world.

Reliably preserving memories of interpersonal relationships

Took a picture with clients at work to remember the moment. (Manila)

Photo with a group of old friends. (Bangkok)

A way to reliably contact people

Checks on dinner with the family and contacts friends. (Kuala Lumpur)

Value privacy, so communicate anonymously with people they don't know

Manages three accounts, each for different content. (Ho Chi Minh City)

Uses an account under a different name to upload interesting photos. (Bangkok)

The internet is a "stage" for creating their persona

Because they entered the virtual world as adults, they draw a distinction between it and the real world and see it as a place to freely build their own personal image.

Post carefully curated and well-considered photos that only show them at their best

Photographed the cookies that came out best. (Singapore)

Posted the marathon photo where they looked the best. (Jakarta)

Posted a bridesmaid photo with perfectly applied makeup. (Manila)

Posted a sports car he wants. (Bangkok)

How others see them is important

Tags his friends in photos to get more likes. (Manila)

Wants to get likes for photos of her kid. (Singapore)

Composition is the key to resort and bathing suit photos. (Jakarta)

The virtual world is just another part of real life

The internet has been around since they were students and is a natural part of life, so they don't see the virtual and real worlds as separate things.

Post themselves as they are
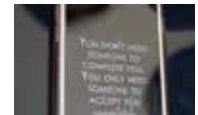
Making a weird face. (Singapore)

Makeup-free (Manila)

Share emotions (indirect communication)

Tweeted her boyfriend when he forgot their anniversary. (Manila)

Posted a photo that expressed her sadness about breaking up. (Vietnam)

Posted a saying that only specific people would understand. (Bangkok)

Always learning

Learning how to take pictures from the world's most popular photographer on YouTube. (Singapore)

Downloaded an app to learn Chinese. Will go to Chinese school if his desire to learn tops 80%. (Vietnam)

Share important moments

Became a YouTuber to share time with his friends. (Jakarta)

Took selfies even during the interview. (Jakarta)

Has already shared a shot of the interview. (Singapore)

AND

AND

AND

Want to have strong relationships

This group wants to reliably preserve memories with precious friends and family, and be able to reliably contact them at any time—and digital tools help them do that. At the same time, they have a strong desire to protect their privacy and have anonymous accounts that they use to interact with people they don't know online.

Want to be acknowledged

This group is always polishing their most flattering image and has a strong desire to get likes on social media. They therefore consider their persona on social media, carefully curate and edit photos, and take comments into account when posting.

Want to share their true selves, warts and all

This group has a strong desire to share their authentic selves through real emotions and real moments. As digital natives, they see the virtual world as just another part of the real world, and therefore dislike artifice. They also believe they can learn anything from the Internet.

How have historical events made the 1970s-, 1980s-, and 1990s-born generations in ASEAN shop differently?

How 1970s-, 1980s-, and 1990s-born *sei-katsu-sha* shop differently

1970s

Attitude toward shopping

Mistake-averse shopping

They buy personal items that make sense for them in terms of value and status, so they treat them with care and use them for a long time.

A new pair of the same trusted marathon shoes (Bangkok)

Motorcycle treasured for over 20 years (Ho Chi Minh City)

Smartphone treasured for over five years (Manila)

Brand handbag she's loved forever (Singapore)

Customer journey

Linear purchasing process; value pre-purchase info

They don't want to make a mistake, so they make sure to gather information and seek recommendations and experiences from people they trust before finally making a decision to actually buy.

Pre-purchase is the focus

Pre-purchase → Comparison → Post-purchase
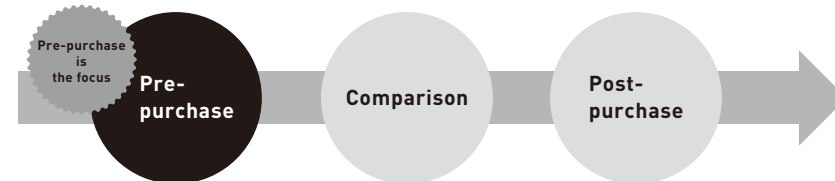
Buys a brand he's loved forever from a friend's shop. (Ho Chi Minh City)

Found a wallet in the same shape she's always liked at the store and bought it. (Bangkok)

Want to avoid mistakes

Since they want to buy things they'll use for a long time, this group has a strong desire to avoid making the wrong purchase. They therefore frequently decide on a brand before they make comparisons, prioritizing opinions from people they trust and their own experiences as prior information.

1980s

Persona-creating shopping

They make buying decisions based on how the items contribute to creating their personal image.

Bought a drone because it would make him seem tech-savvy (Singapore)

Got wearable technology to show she gets her exercise (Singapore)

Trendy watch (Bangkok)

Watch and sunglasses for bicycle commute (Manila)

Boots to suit his motorcycle/ rock-and-roll lifestyle (Jakarta)

Two-channel purchasing process; value comparing

Make full use of both and online and offline channels to make a thorough comparison of the items that suit them and get them as cheaply as possible.

ONLINE
OFFLINE

Pre-purchase → Comparison (Comparison is the focus) → Post-purchase
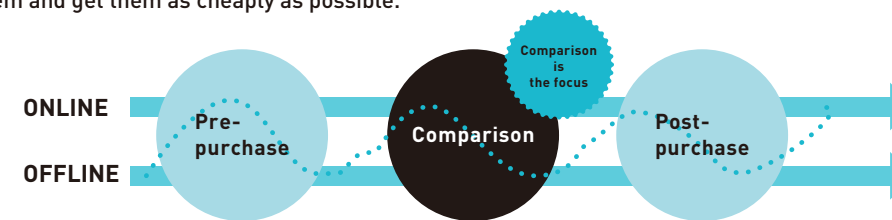
Bought this smartphone after making a thorough comparison of physical stores and comparison sites. (Ho Chi Minh City)

Decided to get the credit card because it would give him discounts on brands he likes. (Kuala Lumpur)

Want to select the best items in the best way

This group has a strong desire to buy the best things in the best way, so in many cases they thoroughly compare both online and real-world shops to see if they can find the perfect thing just a little bit cheaper.

1990s

Shareable-experience shopping

Because there is little purchase risk, they make buying decisions instantly. They purchase things that will support them or result in new experiences to share with friends and family.
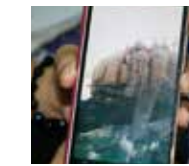
Took a trip to restore her strength after a breakup (Ho chi Minh City)

A game that lets him connect with friends (Singapore)

Color Run (Manila)

Bought a VR system to experience something new (Jakarta)

Bought a device to edit videos for his YouTube channel (Jakarta)

## Cyclical purchasing process; value post-purchase

They compare products in the same way as the 1980s group, but keep collecting information on brands they like after purchase and review them for their friends.

Pre-purchase / Comparison / Post-purchase (Post-purchase is the focus)
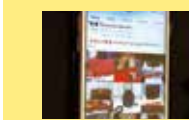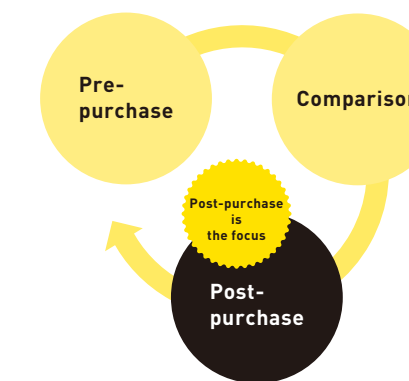
Can sell something right away if doesn't like it. (Bangkok)

Posts reviews after buying something and recommends it to friends. (Jakarta)
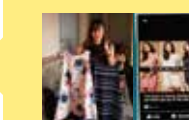
Favorites a brand after buying something, then actively seeks out more information. (Singapore)

Want to get/put out authentic reviews

This group has a strong tendency to spend money on experiences they can share. Because reviews are an important part of the experience, they have a strong desire to get unbiased review information and share authentic reviews with the people around them—so they tend to actively write reviews themselves, and continue to collect information on things they buy if they like them. If they don't, they are very likely to resell it.

Overall assessment of the gaps between the 1970s-, 1980s-, and 1990s-born generations in ASEAN
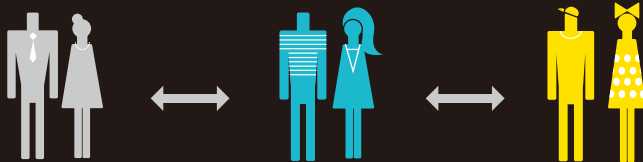
Overall assessment of the gaps between the 1970s-, 1980s-, and 1990-born generations

1970s generation

Impact of difficult experiences from economic crisis and political upheaval

Life and work
Want secure progress
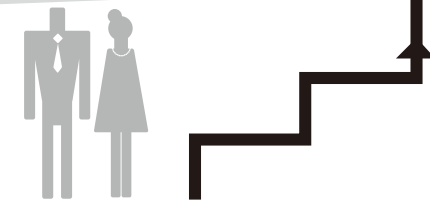
Life will improve if they work hard

Digital
Want richer human relationships

Digital technology is a tool to support human relationships

Shopping
Want to avoid mistakes

Pre-purchase → Safe items

Linear purchasing process

Cultivator 1970s

Want to live a safe, stable life and build richer personal relationships, so they select a reliable path unlikely to fail and steadily cultivate and develop their lives.

1980s

Impacted by both a difficult past and a promising future

Life and work
Want to use multiple facets of themselves to flexibly minimize risk and maximize opportunity
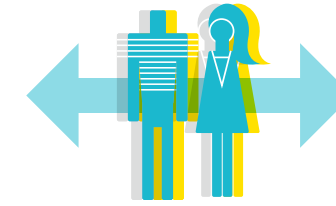
Work hard at what they love and in their careers

Digital
Want to be acknowledged

The internet is a "stage" for creating their persona

Shopping
Want to select the best items in the best way

ONLINE
OFFLINE
Comparison → Creating a persona

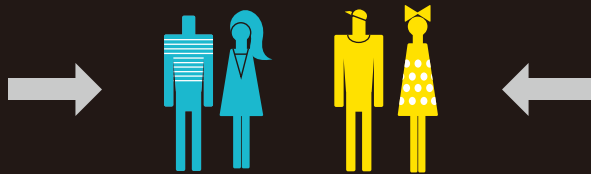Two-channel purchasing process

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Curator 1980s

Want to be accepted for all facets of themselves, so they present different personas to match different situations and select information to flexibly minimize risk and maximize opportunity.

1990s

as well as from extensive support from their parents' generation

Impacted by expanded possibilities from digitalization and globalization

Life and work
Simply want to work at what they like immediately

NOW! NOW!
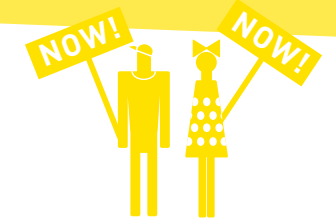
No separation between work and what they love

Digital
Want to share authentic self

The virtual world is just another part of real life

Shopping
Want to get/give authentic reviews

Post-purchase → Experiences to share

Cyclical purchasing process

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Convergenator 1990s

Want to make their ideals a reality in an expanding world, so they simply work at doing what they love and share their authentic moments and feelings with family and friends, equally sharing their experiences and honest evaluations in both the virtual and real worlds.

Marketing implications
How to engage with the 1980s- and 1990s-born generations in ASEAN

Curator 1980s

Want to be accepted for all facets of themselves, so they present different personas to match different situations and select information to flexibly minimize risk and maximize opportunity.

Brand personality

Stage producer

Producer that enables them to present their best selves in the best light

Stimulates them to get closer to the selves they want to project

Convergenator 1990s

Want to make their ideals a reality in an expanding world, so they simply work at doing what they love and share their authentic moments and feelings with family and friends, equally sharing their experiences and honest evaluations in both the virtual and real worlds.

Brand personality

Honest buddy

Always by their side, complementing their feelings and situation, allowing them to just be themselves

Allows them to show themselves as they really are, warts and all

Sei-katsu-sha born in the 1980s and 1990s cannot easily be lumped together as a single "Millennials" generation

Millennials

Curator 1980s **Convergenator 1990s**

Require different approaches

Brand
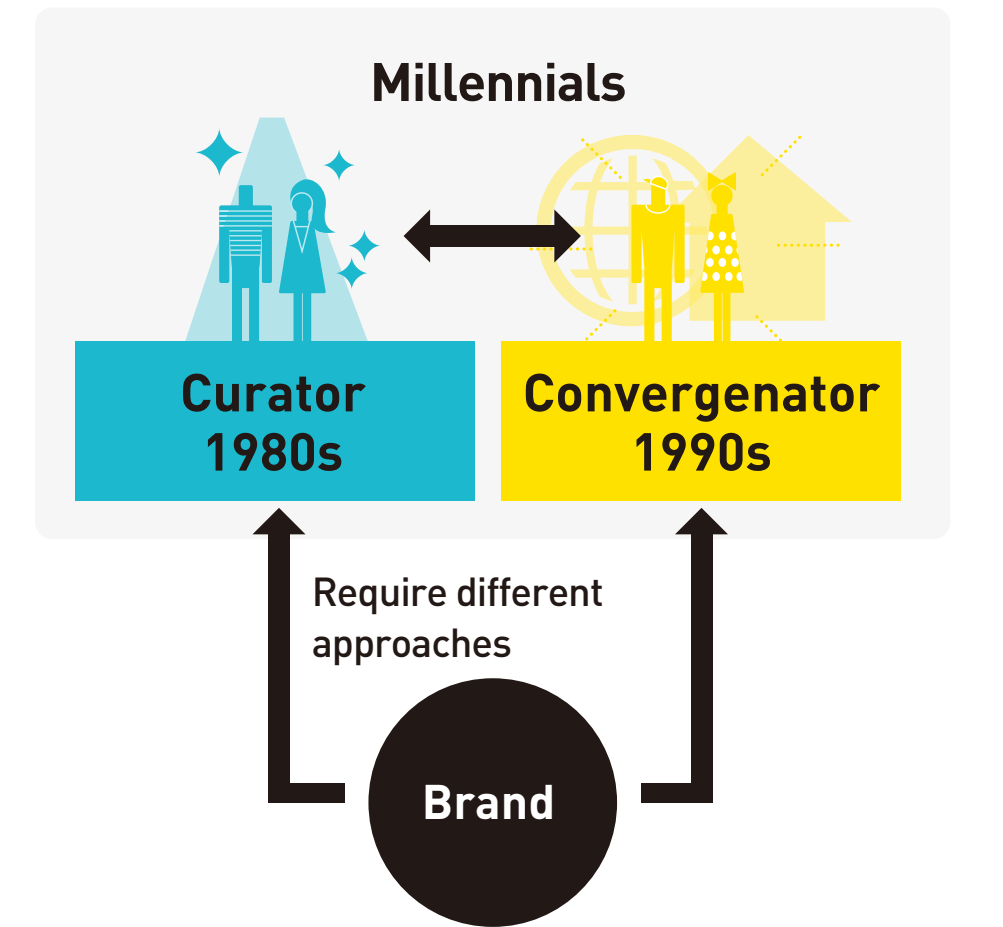
What approaches are best for each generation?

Make the 1980s group shine
Communicate like a stage producer

Be a companion to the 1990s group
Communicate like an honest buddy

Time in the spotlight

Present items, experiences, opportunities, and places that immediately make them want to share and that will get them likes on social media

Example: At events, provide stages where anyone can be the main character

Character-based approach

Provide structures and options that allow them to make the choices that help them become their ideal persona

Example: Online shopping site that analyzes ideal personas and suggests products based on the results

Make themselves exceptional

The 1980s-born group wants to be acknowledged, so offer special status or praise that satisfies their need to be recognized
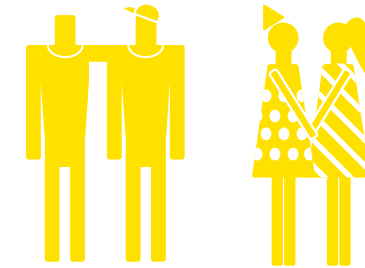
Example: Issue certificates to loyal users or invite them to events

Anytime, any place

Offer situations and systems that allow this group to engage in interactive communication whenever they want and wherever they are

Example: Real-time responses on social media

Mood-based approach

Adjust real-time communication to complement this group's mood in the moment

Examples: Analyze the mood of social media posts for retargeting

Express their true selves

Offer products and services that support this group in maximizing authentic self-expression

Examples: Help them take on ridiculous challenges and engage in activities that older generations won't understand

Epilogue

Recently, there was a quote that said, "Because all the people of the world are part of one electronically based, intercommunicating network, young people everywhere share a kind of experience that none of their elders ever had…"
While this sentiment may express a worldwide phenomenon, we have found through this study of ASEAN Millennials that the way each decade has embraced the digital space varies.

It is far too simplistic to say that people born in the 1990s, 1980s and 1970s view their life with technology with the same cyber glasses.

In a nutshell:
Those born in the 1990s are comfortable sharing their lives online. They make little differentiation between the digital and real worlds. The two have become one. They are comfortable with real life lived on the Internet.

Those born in the 1980s, on the other hand, are good at self-promotion and fostering connections through social media. They tend to limit their online sharing in order to craft their own desired public image, emphasizing good qualities and exciting parts of their lives.

The 1970s-born are on the cusp. They didn't exactly grow up in the digital age. They have less of an addiction to mobile devices. The old values of rising in the world through hard work still form the bedrock of their conviction.

What is the take-away?
Marketers and communicators need to be more vigilant in defining the Millennials they want to reach. As we have found, one size doesn't fit all. A broad stroke "digital campaign" will not cut it.

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