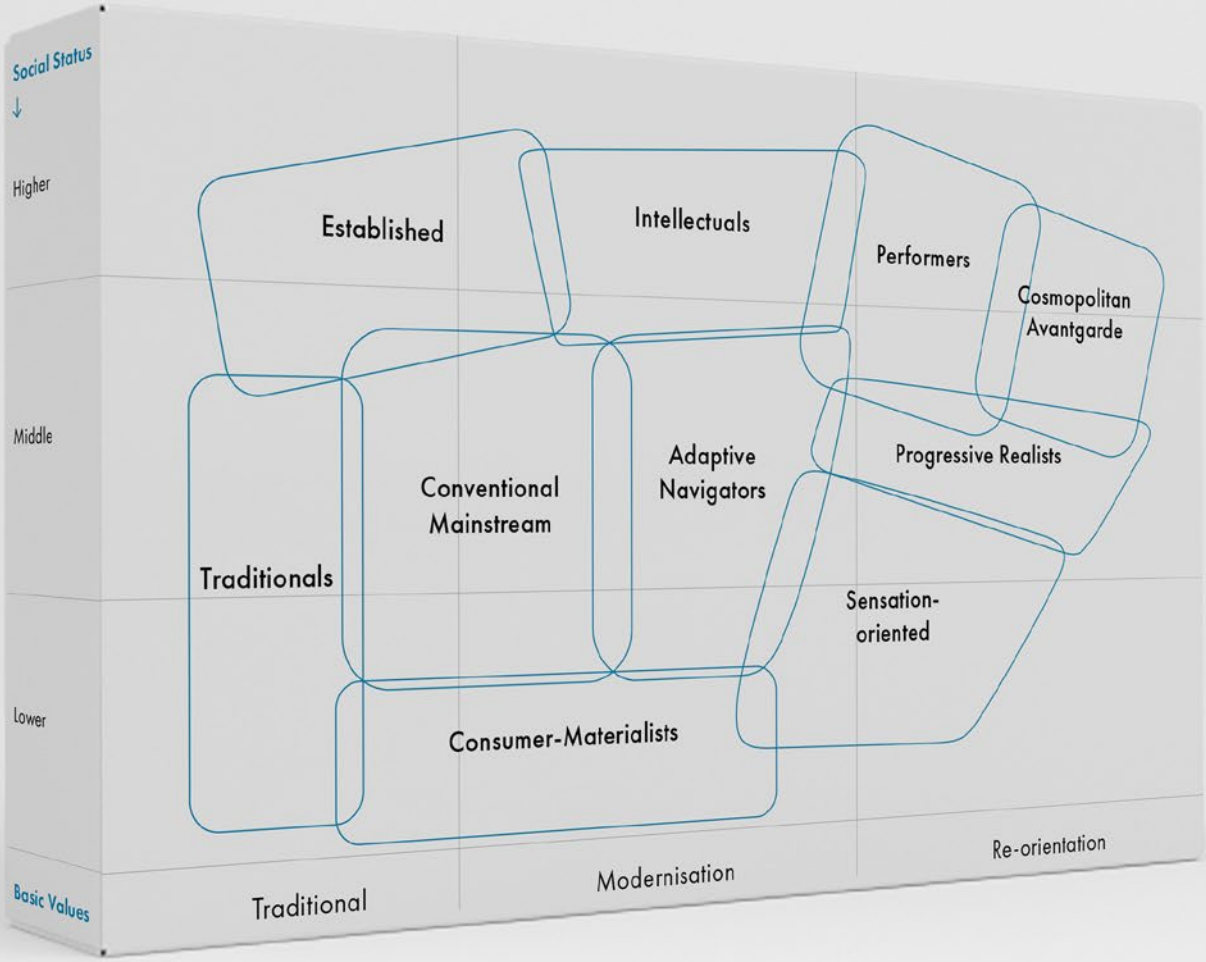
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The Sinus-Meta-Milieus®

Information on an international target group segmentation model



sinus

People from different countries but comparable milieus often have more in common than with the rest of their fellow countrymen



Manfred Tautscher
CEO SINUS Institute

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Sinus-Meta-Milieus®: The gold standard of international target group segmentation

With over 40 years of experience in work with target groups and lifeworld research, we apply our knowledge to international markets.

The Sinus-Meta-Milieus® are based on the Sinus-Milieu Model, which was originally developed for the German market at the end of the 1970s and later adapted for Austria and Switzerland. Starting from local everyday realities, it quickly became apparent that „groups of like-minded people" exist, stretching beyond national borders, and that common basic orientations, values, and lifestyles could be identified. Often, people from different countries but in comparable milieus had more in common than they did with their countrymen in different milieus. This fact led to the identification of broad, multi-national everyday life segments – which we call „Meta-Milieus".

We live in an age of shifting boundaries. This offers numerous opportunities for some milieus but overwhelms and unsettles others. From a strategic marketing and communications perspective, it is therefore increasingly important to distinguish between the different milieus and correctly understand high-value target groups. The Meta-Milieus provide a powerful and practical planning tool for this purpose on an international level.

Successful product planning and communication today require a comprehensive and at the same time differentiated approach to the consumer, which makes it necessary to classify target groups more precisely than conventional sociodemographic variables allow. The Meta-Milieus offer a proven approach that focuses on consumers' lifestyles and basic value orientations.

The Meta-Milieus target group model is more than just a fashionable variant on the typical market research toolkit. It is a well-established, systematic, and creative approach to research, marketing, and communication alike.

Social Status ↓

Higher

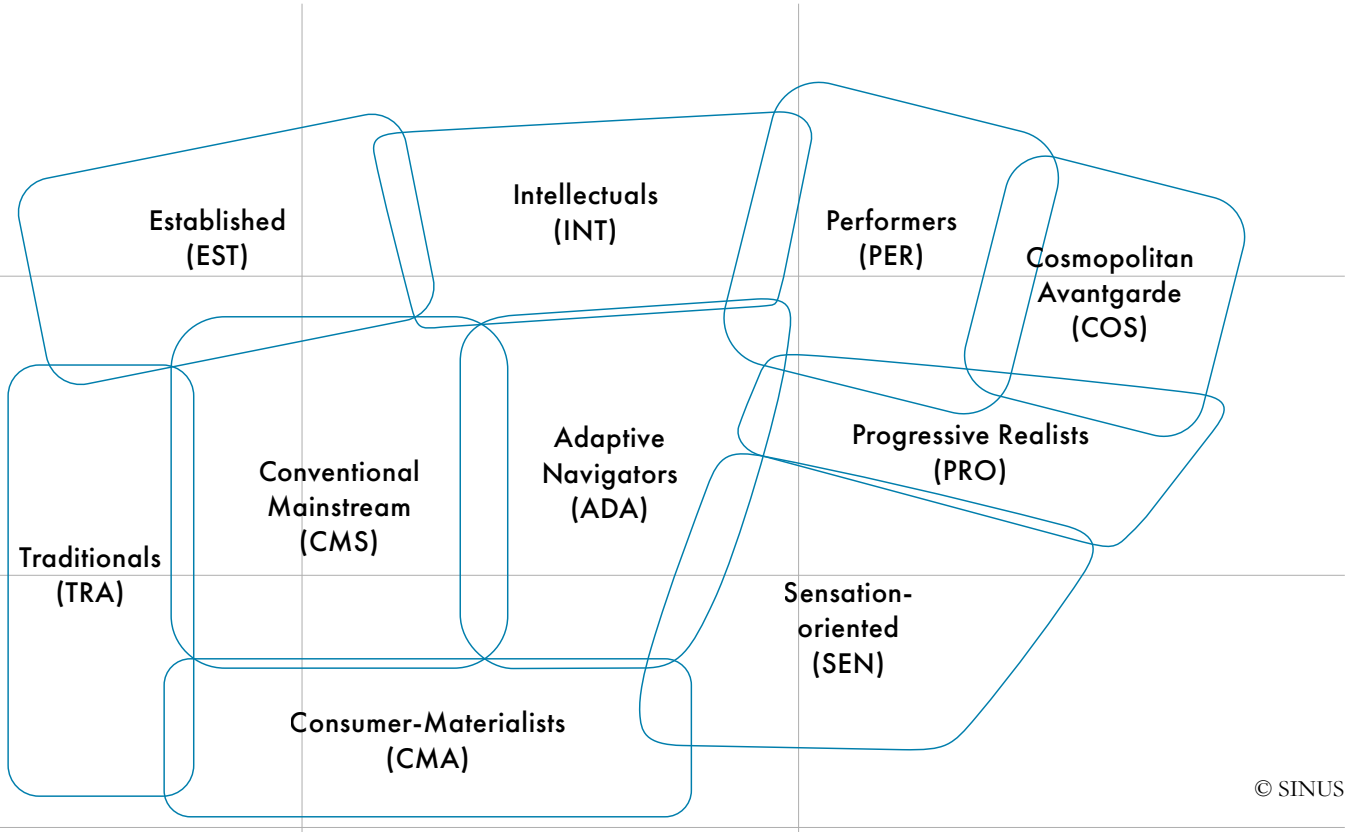
Middle

Lower

Basic Values →

The Sinus-Meta-Milieus® are a model of target groups within society

The milieu model by SINUS: "Groups of like-minded people"



The Meta-Milieus group together people with similar values and a comparable social status. While each milieu has a distinct character, the transitions between them are fluid. We call this the „uncertainty factor in everyday reality".

The Sinus-Milieu models are all graphically very similar. The vertical axis shows the social position of each milieu (ranging from low to high) and the horizontal axis shows the value orientation (ranging from traditional to postmodern). The higher a milieu's position on the chart, the more upscale its education, income and occupational position. The further to the right a milieu is located, the more modern its basic value orientation in a sociocultural sense.

Lifeworlds: more than income and age

It is common sense that different people in a certain country or city live in very different "worlds": they have different values, life goals, lifestyles, etc.

The Meta-Milieus shed light on these lifeworlds in a differentiated way. This is important because the diversity of lifestyles is often a more significant factor in people's everyday experience than socio-demographic variables like income or age. Social affiliation and consumer choices alike are shaped not only by socio-economic criteria, but also by lifestyle commonalities and differences. The Meta-Milieu model captures lifestyles, value orientations, and aesthetic preferences – while also taking social position into account.

The Meta-Milieus therefore offer marketers more information and better decision-making aids than conventional target group approaches.

Meta-Milieu models exist for Germany, Austria and Switzerland as well as for over 50 other countries. The models are continuously adapted to sociocultural changes in the respective societies.

Three people with similar sociodemographic characteristics (same age, education, income, marital status, living in a big city...) can nevertheless have very different goals, living environments, and consumer preferences.

New York City

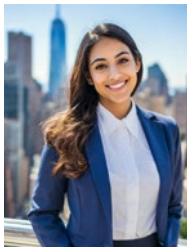
Security-driven







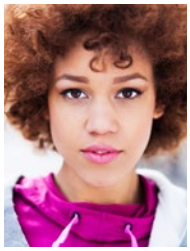
Success-driven







Creativity-driven





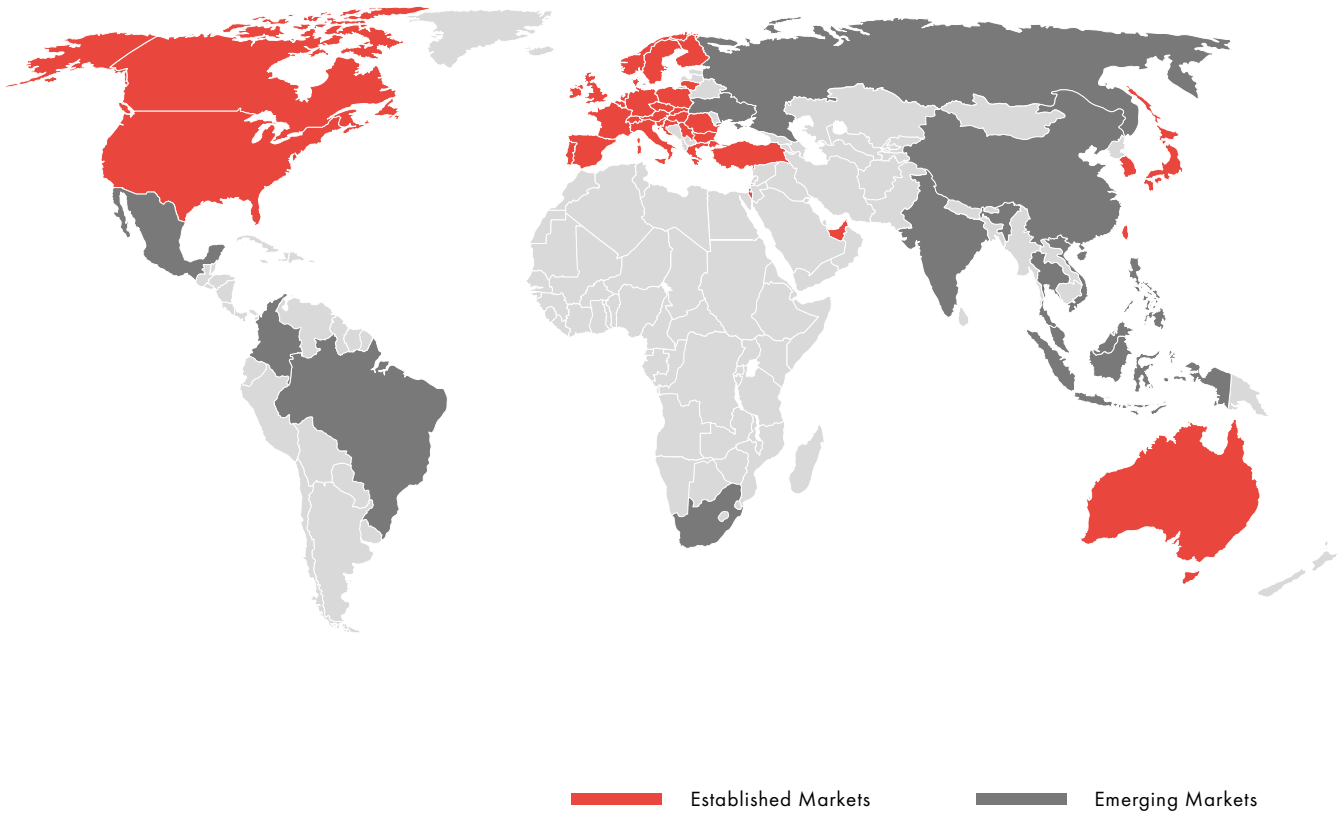


Striking a balance between comparability and precision

For our international milieu model, we distinguish between two global economic spheres: Established Markets and Emerging Markets. Both spheres have their own model, with ten and nine milieus, respectively. These milieus describe the lifeworlds of consumers holistically and across countries, without ignoring local characteristics.

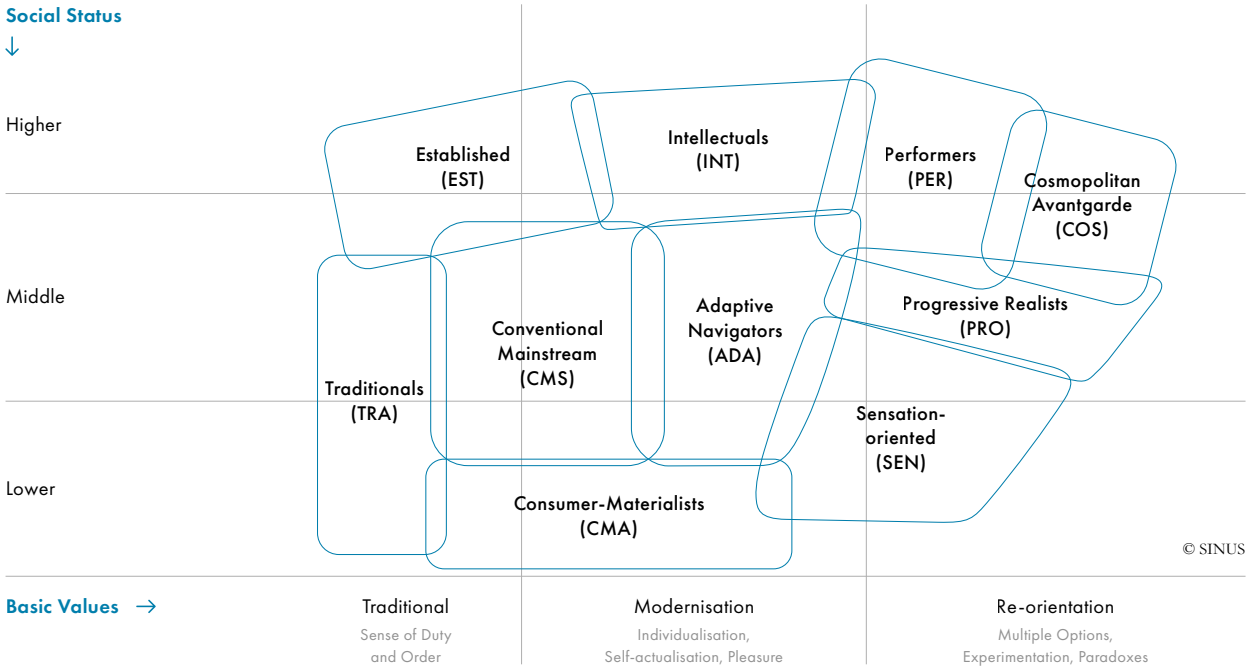
Such transnational target group models are essential against the backdrop of globalized markets. An international marketing strategy cannot assume that insights gained in one country can simply be transferred to other countries without foregoing knowledge of their structural conditions. The aim of SINUS' international milieu research is to provide globally active companies with information about current target groups and the dynamics of social change, thereby providing a basis for sound marketing decisions. The Sinus-Meta-Milieus® are modelled on a country-specific basis, with the premise of being as uniform as possible as an international target group instrument, but also as country-specific as necessary.

The Sinus-Meta-Milieu® model has been developed for the Established Markets with 38 countries and for the Emerging Markets with 13 countries:



The Established Markets

The Established Markets model consists of ten Sinus-Meta-Milieus®:



For these countries we apply the Established Markets model

West/South Europe

- Austria
- Belgium
- Denmark
- Finland
- France
- Germany
- Greece
- Ireland
- Italy
- Luxembourg
- Norway
- Netherlands
- Portugal
- Spain
- Sweden
- Switzerland
- United Kingdom

East Europe

- Bulgaria
- Croatia
- Czech Republic
- Hungary
- Lithuania
- Poland
- Serbia
- Slovakia
- Slovenia
- Romania

Core Anglosphere

- Australia
- Canada
- USA

East Asia

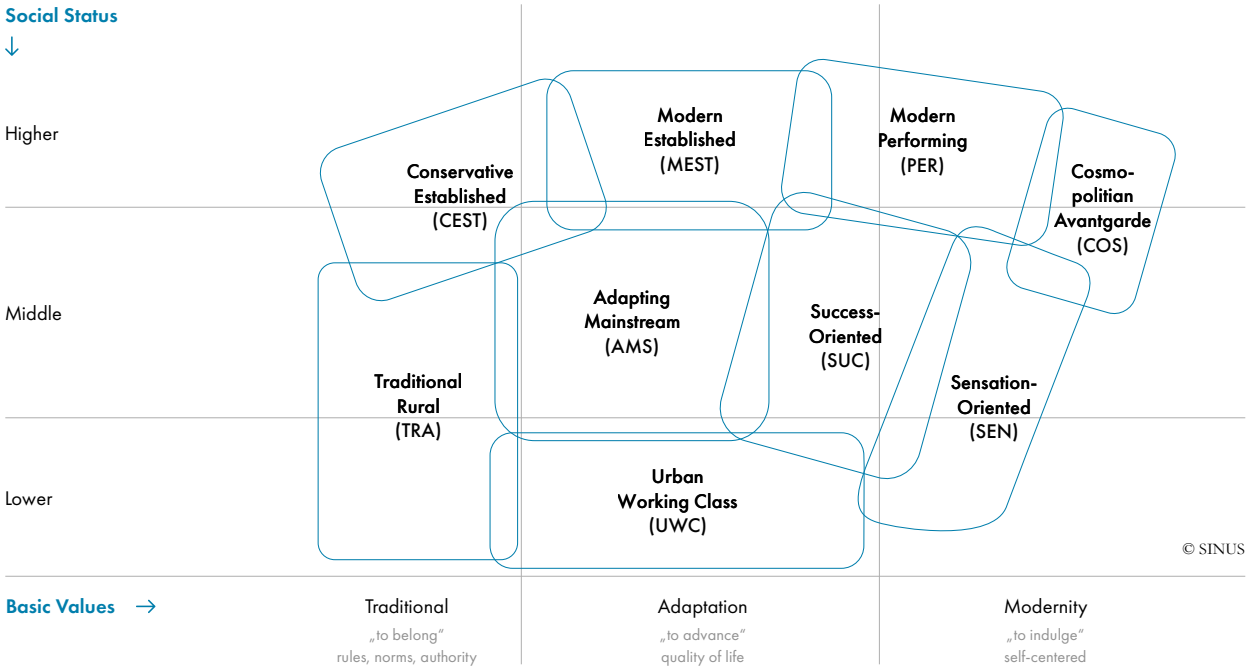
- Hong Kong
- Japan
- Singapore
- South Korea
- Taiwan

West Asia

- Israel
- Turkey
- United Arab Emirates

The Emerging Markets

The Emerging Markets model consists of nine Sinus-Meta-Milieus®:



For these countries we apply the Emerging Markets model

Americas

- Brazil
- Colombia
- Mexico

Africa

- South Africa

Europe

- Russia
- Ukraine

Asia

- China
- India
- Philippines
- Indonesia
- Malaysia
- Thailand
- Vietnam

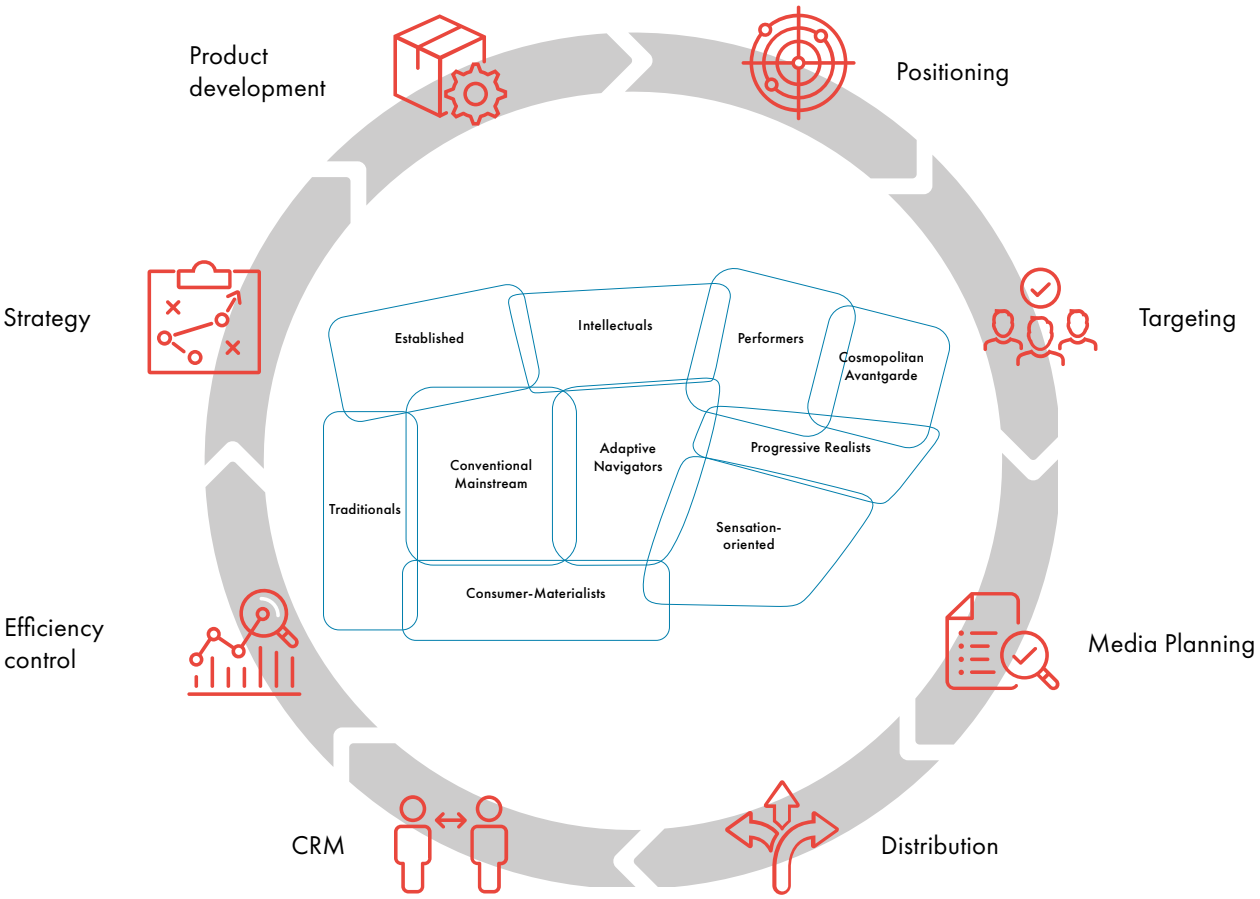
Emerging Markets are usually found in countries that were formerly colonized or shaped by genuinely socialist governments. Economic growth and individualization processes, as well as a broader distribution of wealth in society, often began in the 1990s, though these processes were already taking place in the Established Markets in the 1960s and 1970s. One of the main differences between the two models can be found in the heart of society. In Emerging Markets, the economic upturn of recent decades has led to large sections of society escaping poverty and, unlike previous generations, having real opportunities to advance socially and build prosperity. In Established Markets, on the other hand, the heart of society is under pressure to maintain a standard of living built up by the previous generation, namely the current generation's parents. Even if social advancement is still possible in Established Markets, fear of losing one's economic and social position are more pronounced, with the view of the future often more pessimistic.

The Meta-Milieus can be applied in a wide range of areas and disciplines. This makes them a unifying thread in the entire marketing process.

SINUS can help tailor Meta-Milieu applications suited to your business.

The Meta-Milieus enable the differentiated description of customer and buyer groups, the targeted positioning of products and services, the definition of market segments for new products and relaunches, the detection of market niches, the efficient identification of buyer potentials, and the early recognition and localization of new trends and opportunities.

Because the Meta-Milieus capture the lifeworlds and lifestyles of consumers, they anchor a comprehensive information system that can be used for target group optimization. This applies to all areas of marketing, from product development to brand positioning, as well as communication and media planning.



There is hardly a category in marketing and social research for which the Meta-Milieus cannot be used

To achieve an even higher degree of accuracy, contact us at any time to plan your own study. We can design deep dives into the topics that are most relevant for you (and only you). A custom study will not only provide exclusive data on critical topics from the perspective of the Meta-Milieus, but also the chance to work with our consultants to interpret this data's significance for you and your project.

The Sinus-Meta-Milieus® (Established Markets)

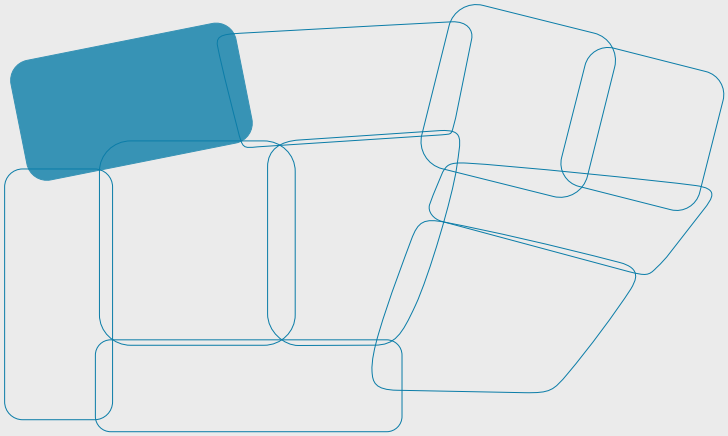
Established Markets Milieus		Short Description
Leading Milieus	**Established**	**Status-driven conservative elite:** High self-confidence; classic responsibility and performance ethics; exclusivity and status claims; acceptance of social order
	Intellectuals	**Academic elite with post-material roots:** High affinity for indulgence, sensuality, art & culture; critical of globalization; advocating for justice & public welfare; taking responsibility for oneself and others; affinity for (continuing) education and embracing quality of life
	Performers	**Efficiency- and progress-oriented modern elite:** Global economic and liberal thinking; affinity for "best in class" consumption, modern design, early adopting; interest in technology & digital; competitive and career-oriented, networker; open to change, new things
Milieus of the Future	**Cosmopolitan Avantgarde**	**Ambitious & individualistic avant-garde:** Cosmopolitan, urban, mobile & flexible; digital nomads, life-style vanguards; pronounced self-expression; postmodern lifestyle elite, anti-mainstream, desire to stand out; joie de vivre, ambitious and success-oriented
	Progressive Realists	**Drivers of social transformation:** Sustainable lifestyle without ideology of renunciation; driving the global social transformation; progressive, optimistic; taking responsibility for society; ease of dealing with contradictions, party & protest, seriousness & entertainment
Modern Mainstream	**Adaptive Navigators**	**Adapting modern mainstream:** Flexible pragmatists; young modern middle class; high willingness to adapt and perform; modern lifestyle, digital affinity; reliable & loyal, open to new – but tested and verified - things
	Sensation-Oriented	**Materialistic- and entertainment-focused (lower) middle class:** Hedonistic approach, with focus on today; conspicuous consumption; adjustment if necessary, breakout if possible; unconcerned, open to risks; anti-bourgeois yet materialistic life-style, rejection of political correctness and conventions; looking for fun, action, entertainment, stimulation
Traditional Mainstream	**Conventional Mainstream**	**Harmony-seeking older middle-class:** Middle class under financial and ideological pressure; desire for secure circumstances, fear of losing well-deserved achievements; search for community, cohesion, social life, neighborly support – down to earth; distrust towards the primacy of the elites – feeling of being left out in favor of others
	Traditionals	**Order-seeking older generation:** Petty bourgeois world, traditional working-class culture; desire for social security, harmony, consistency; (voluntarily) disconnection from modern lifestyle and digital culture; desire for simple, safe, down-to-earth lifestyle
	Consumer-Materialists	**Lower class striving for orientation and participation:** Precarious living conditions; undemanding adaptation to necessities; desire for consumption standard of the middle class; defiant cohesion within their own community; fear of speed of change, being left behind

Established

Status-driven conservative elite



> One of the most important things is to achieve a recognized position in society.



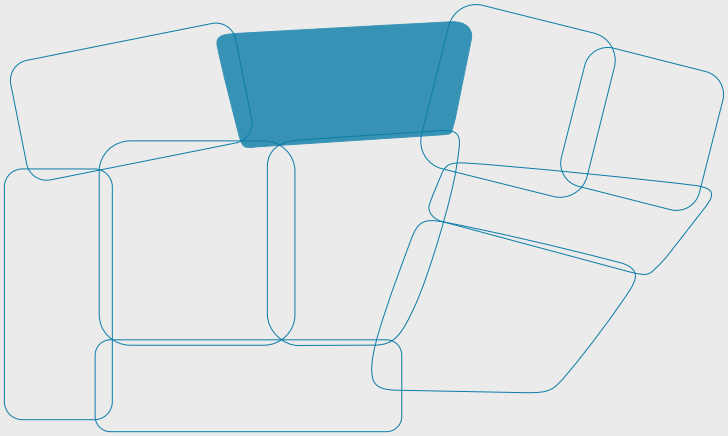
- High self-confidence
- Classic responsibility and performance ethics
- Exclusivity and status claims
- Acceptance of social order

Intellectuals

Educated elite with post-material roots



> In everything I do i think about the consequences for the environment.



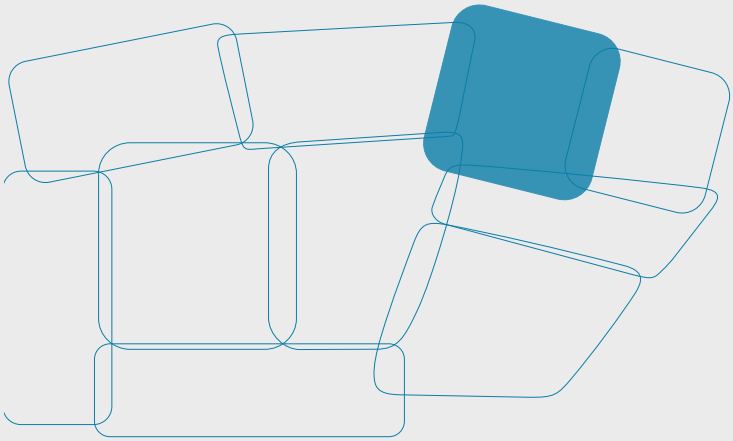
- High affinity for indulgence, sensuality, art & culture
- Critical of globalization
- Advocating for justice & public welfare
- Taking responsibility for oneself and others
- Affinity for (lifelong) education and embracing quality of life

Performers

Efficiency- and progress-oriented modern elite



> I set high goals for myself that I try to achieve.



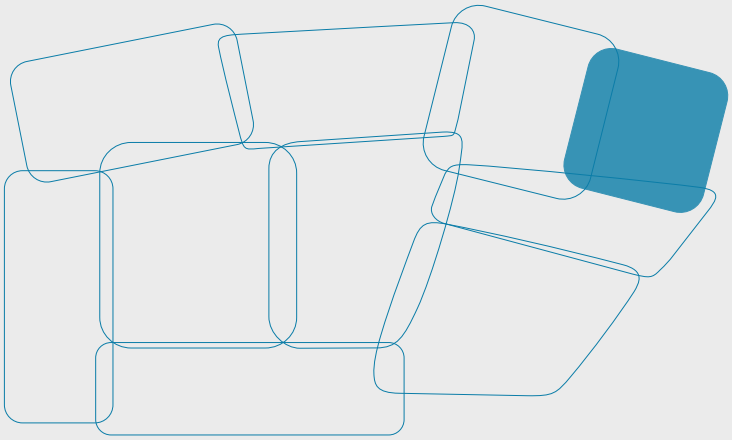
- Global economic perspective and liberal mindset
- Affinity for "best in class" consumption, modern design, early adopting
- Interest in technology & digital
- Competitive and career-oriented, networker
- Open to change, new things

Cosmopolitan Avantgarde

Ambitious & individualistic avant-garde



> In life I am always open to new opportunities and challenges.



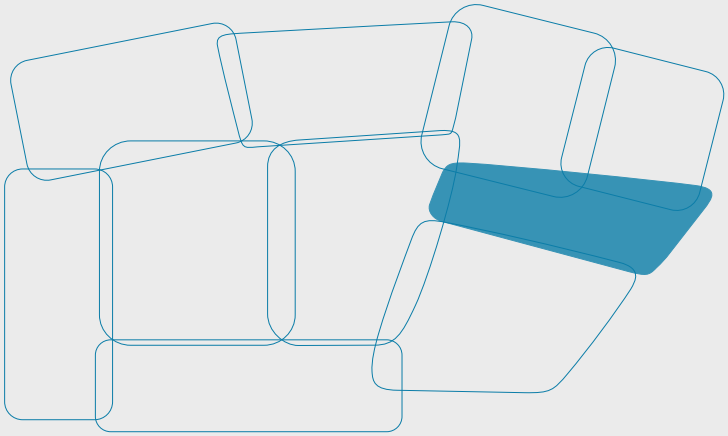
- Cosmopolitan, urban, mobile & flexible
- Digital nomads, lifestyle vanguards
- Pronounced self-expression
- Postmodern lifestyle elite, anti-mainstream, desire to stand out
- Joie de vivre, ambitious and success-oriented

Progressive Realists

Drivers of social transformation



> One should get politically involved to fight oppression and exploitation in our society.



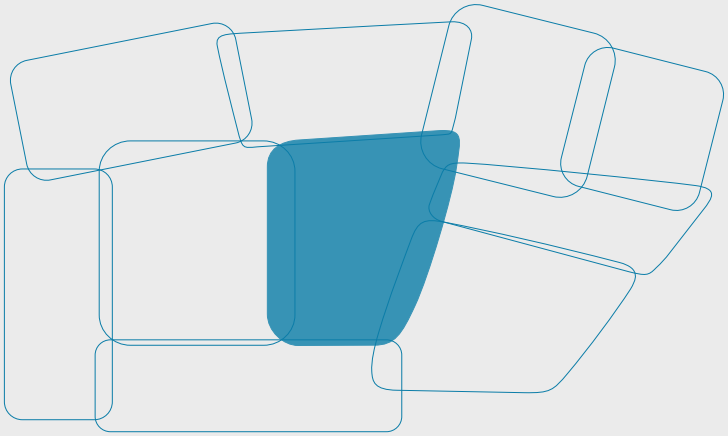
- Sustainable lifestyle without ideology of renunciation
- Driving the global social transformation
- Progressive, optimistic
- Taking responsibility for society
- Ease of dealing with contradictions:party & protest, seriousness & entertainment

Adaptive Navigators

Adapting modern mainstream



> I fear that my standard of living will deteriorate in the future.



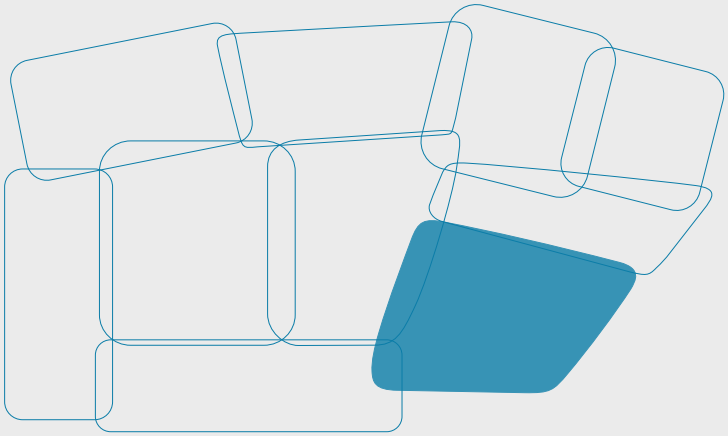
- Flexible pragmatists
- Young modern middle class
- High willingness to adapt and perform
- Modern lifestyle, digital affinity
- Reliable & loyal, open to new – but tested and verified - things

Sensation-Oriented

Materialistic- and entertainment-focused (lower) middle class



> The meaning of life for me is to have fun and to be able to afford what I like.



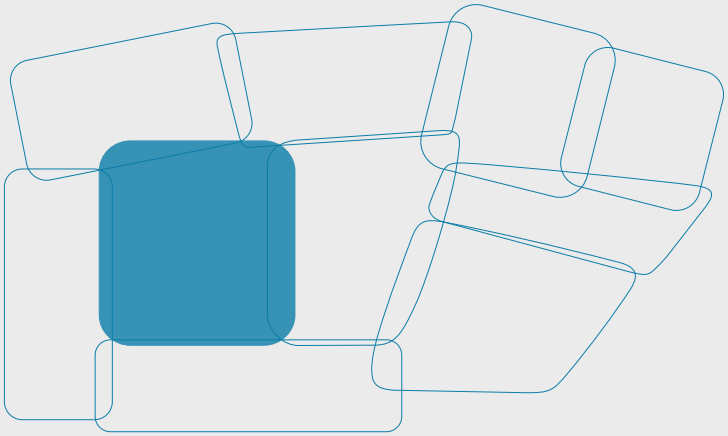
- Hedonistic approach, with focus on today
- Conspicuous consumption
- Adjustment if necessary, breakout if possible
- Unconcerned, open to risks
- Anti-bourgeois yet materialistic lifestyle, rejection of political correctness and conventions
- Looking for fun, action, entertainment, stimulation

Conventional Mainstream

Harmony-seeking older middle class



> I find the increasing social coldness in our society threatening.



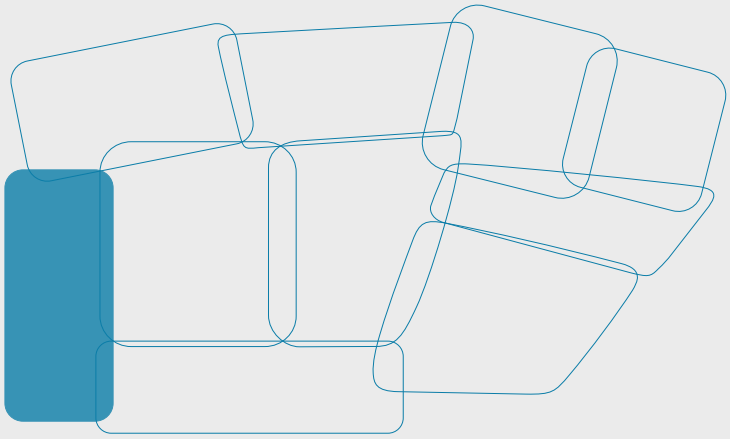
- Middle class under financial and ideological pressure
- Desire for secure circumstances, fear of losing well-deserved achievements
- Search for community, cohesion, social life, neighborly support – down to earth
- Distrust towards the primacy of the elites – feeling of being left out in favor of others

Traditionals

Order-seeking older generation



> I am a rather steady person, attached to habits and familiar things.



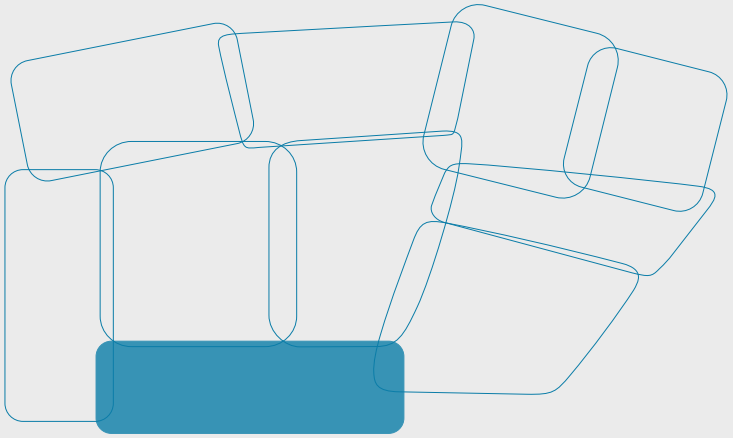
- Petty bourgeois world, traditional working-class culture
- Desire for social security, harmony, consistency
- (Voluntary) disconnection from modern lifestyle and digital culture
- Desire for simple, safe, down-to-earth lifestyle

Consumer-Materialists

Lower class striving for orientation and participation

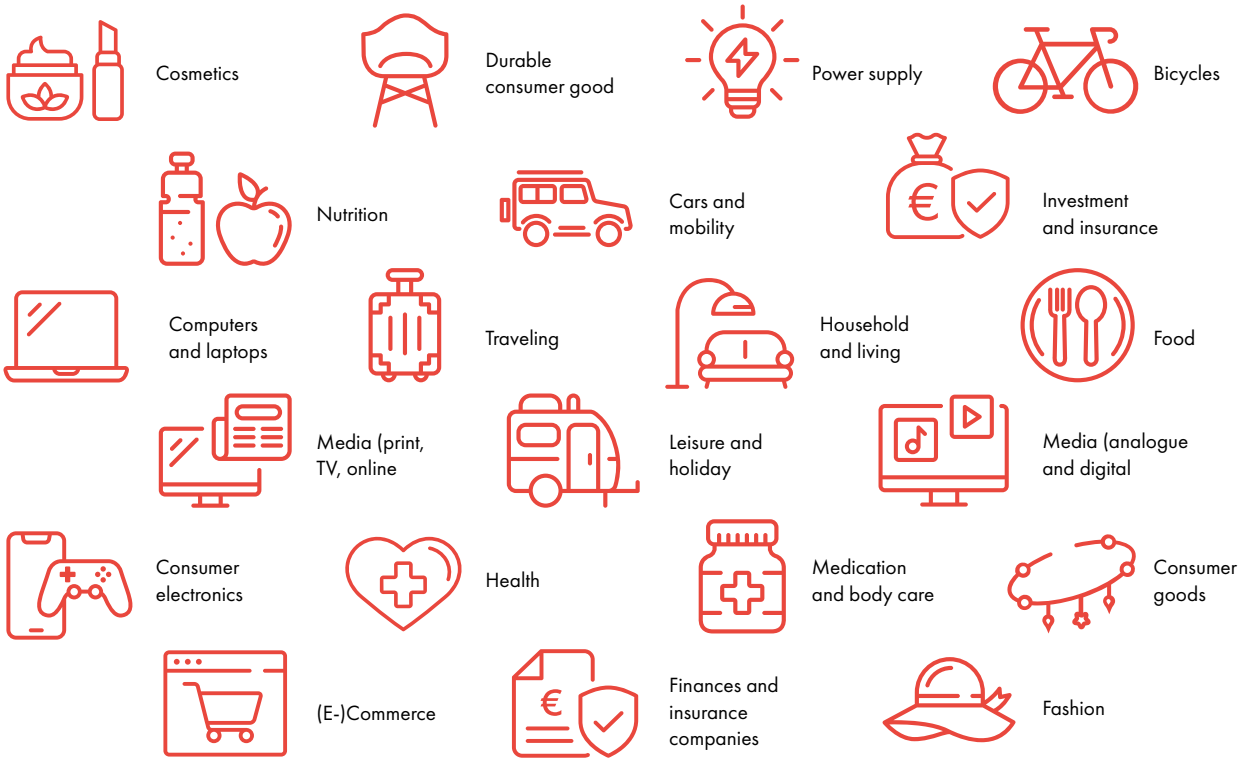


> Today everything is changing so fast that one doesn't know what to stick to.



- Precarious living conditions
- Undemanding adaptation to necessities
- Desire for consumption standard of the middle class
- Defiant cohesion within their own community
- Fear of speed of change, being left behind

SINUS can prepare custom-tailored milieu data on consumer behavior in numerous markets



From A for automotive to Z for Zoo vists

Through our cooperation with Kantar Media, we have access to international market media studies in more than 20 countries and can carry out individual counts and analyses on this basis - according to Sinus-Meta-Milieus® or, if desired, according to predefined demographic subgroups. The basis for this is the international market media study „Target Group Index", TGI for short, which collects representative data on consumer behavior and media use.

If the TGI data pool doesn't cover your core topics, conducting a custom study with the SINUS Institute lets you define the data points to collect on target groups in more than 50 countries.

KANTAR

Target group knowledge with SINUS information packages

Basic characteristics, lifestyle, media profiles, and much more

Our information packages establish a good foundation for working with the Meta-Milieus. The transnational information package for the „Established Markets“ contains in-depth information (in words and pictures) about the Sinus-Meta-Milieus® which are mainly located in Europe and North America. With this information, you will be able to work competently and comprehensively with each individual international target group.

In addition to a detailed introductory chapter on the Meta-Milieus, this information package contains more than 100 pages of qualitative findings based on international milieu research for each of the ten established Sinus-Meta-Milieus:

- Key characteristics
- Sociodemographic overview and key values
- Lifestyle collages
- Identity and worldview
- Living environment
- Sociocultural trends
- Media profile
- Communication profile
- Consumption profile



The package for the „Emerging Markets“ focusses on countries that are mainly located in Asia, Africa and South America and is also available in English language. It contains a transitional comprehension of the following topics:

Interested? For more details on our Information packages visit our website

- Key characteristics
- Sociodemographic overview and key values
- Lifestyle collages
- Identity and worldview
- Living environment

The Country Booklets are available for more than 40 countries and contain further information in English about the Meta-Milieus in the respective countries. Each country booklet contains around 30 pages and offers compact insights into all Meta-Milieus:

- Market size of the Sinus-Meta-Milieus®
- Sinus-Meta-Milieus® short profile
- Lifestyle collage
- Sociodemographics



Enrichment of quantitative data with the Sinus-Meta-Milieus®

Sinus-Milieu-Boost

For an uncomplicated and cost-efficient integration of the Meta-Milieus, we offer various options: Commissioning per boost or contingents (at a reduced price).

Enrichment with milieus is suitable for many study formats:

- Usage & attitude studies
- Product and concept testing
- Customer satisfaction analysis
- Advertising material test
- Image studies
- Tracking studies
- Visitor and user analysis
- Advertising effectiveness research

The benefits of the Milieu-Boost

Sociocultural in-depth analyses
- Milieu deepening of existing segmentations
- Refinement & quantification of personas

Embedding in an info-ecosystem
- Possibility of recourse to milieu-correlated data pools
- Findings do not have to be collected again

Insights from existing Milieu studies
- Many Sinus studies are publicly available
- Possibility to compare and supplement one's own target group knowledge

Geo marketing
- Transferability to microgeography

Visit our website for more information on our research

Lectures and workshops about the Sinus-Meta-Milieus®

No stage is too small or too big for us

Our lectures and workshops live from the first-hand impressions of our ethnological field research and from the social science interpretation of findings.

Our team of scientists did not grow up in an academic theory ivory tower, but out in the field. Accordingly, they can report on our studies in a true-to-life and informative way.

Whether it is a discussion panel at the local youth center or a keynote speech at international science conferences, whether it's a researcher or a CEO as a speaker - we will find the right voice for your event.

The benefits of the Milieu-Workshops

- Introduction to working with the Meta-Milieus
- Vivid and entertaining presentation of different living environments with practical exercises
- Various follow-up workshops possible, e.g. for communication or product positioning



Visit our website for more information on our workshops

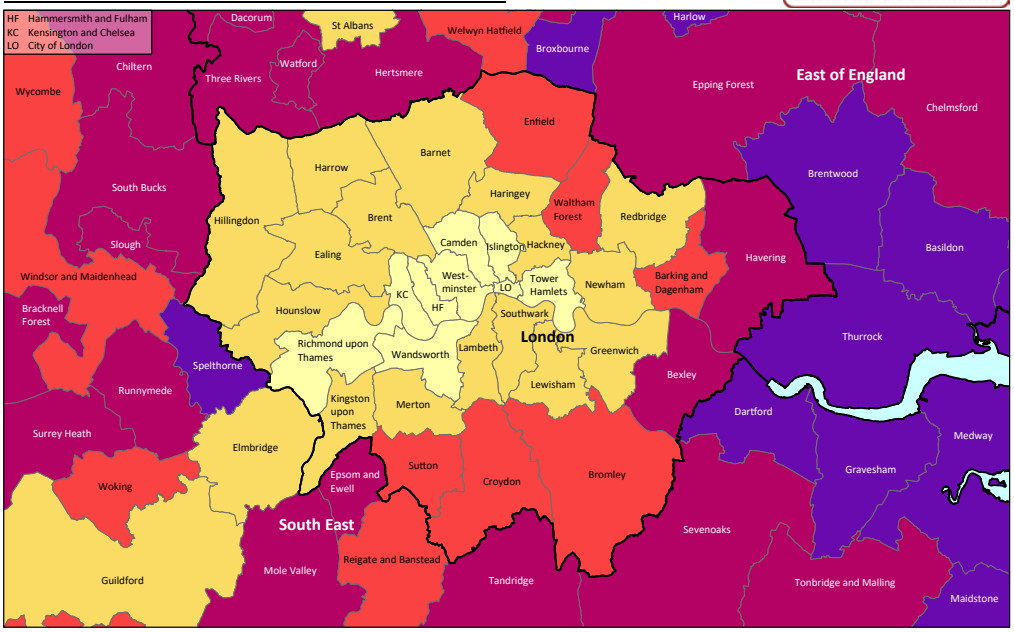
Where do which milieus live?

In order to make the Meta-Milieus usable for direct marketing and spatial planning, the Meta-Milieus in global microgeography were developed in cooperation between SINUS and Michael Bauer Research (MB-Research).

Based on the country-specific primary survey of the SINUS Institute for the internationally homogeneous segmentation of the resident population according to milieu segments, MB-Research analyses the respective milieus with regard to their demographic, socio-economic and geographic variables. This makes it possible for MB-Research to determine the geographical distribution of milieus even at the smallest level.

Sinus-Meta-Milieus Type TRA - Traditionals
Greater London Area on the level of Districts

MB-Research
Internationale Marktdaten



© Sinus Markt- und Sozialforschung GmbH, Heidelberg, Michael Bauer Research GmbH, Nuremberg

The Meta Milieus can be used for different purposes:

Strategic marketing
- Product development
- Brand positioning
- CRM, distributions and sales
- Fundraising

New customer acquisition
- Target group analyses and localisation
- Optimisation of advertising channels and customer approach
- Address selections, direct mailing, Out of Home, insert optimisation

Customer loyalty
- Milieu-specific measures and address
- Cross- and up-selling

Location/branch network planning
- Identification of target group potential in the catchment area
- Category management, PoS marketing

Communication planning
- Business and layout design
- Milieu-specific reach/affinities

The SINUS Institute
Understanding what moves people

The SINUS Institute is an independent, owner-run institute for market and social research

With ethnological curiosity, empathy, respect, scientific reliability and, last but not least, over 40 years of experience, SINUS researches the everyday reality of people, sociocultural change and its significance for companies and institutions.

The SINUS Institute is part of the INTEGRAL-SINUS-OPINION Group, with offices in Vienna (INTEGRAL), Heidelberg, Berlin (SINUS) and Nuremberg (OPINION). Together, the group has more than 100 years of experience in market and social research in the German-speaking countries (GSA) and worldwide.

SINUS maintains a large number of national and international research and consulting cooperations and has built up a worldwide network of experts from a wide range of disciplines: Leading agencies and consultants, specialized research institutes, universities, brand technicians, direct marketers and renowned design experts cooperate - in some cases exclusively - with SINUS.

The SINUS Academy offers a comprehensive range of lectures, workshops and further training on social and market research topics.

SINUS is advised by an interdisciplinary scientific advisory board with renowned experts from marketing, management, educational research, urban sociology and the church.



SINUS examines people's motives and constitutions



SINUS records sociocultural change and identifies trends



SINUS develops and describes target groups - tailor-made



SINUS translates research findings into strategic advice



SINUS identifies target groups that determine the trends of the future



SINUS is broadly networked in business and science



Digital/Internet


Energy


Bicycle


Politics


Finance


Flight und Migration



Gender


Health



Youth


Future


Luxury

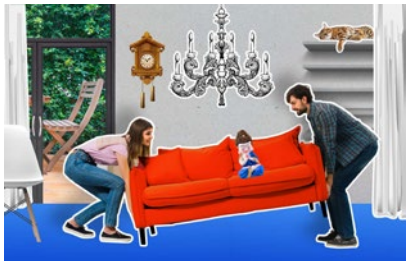

Environment/Nature


Family


Employer Branding, Recruiting


Religion


Tourism


Living



Media

Contact

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