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Germany in transition: SINUS-Institut presents an updated model of German society: Sinus-Milieus® 2021

For four decades, SINUS-Institut has been researching people's changing values and lifestyles. This has resulted in the Sinus-Milieus model, a "map" of society and its constituent target groups. The Sinus-Milieus 2021 reflect Germany's new everyday social reality - shaped by political changes, digitalisation, populist movements, and the increasingly incontrovertible reality of climate change.

The Sinus-Milieus cluster people into groups on the basis of similar values, lifestyles, and social situations. The Sinus-Milieus reveal what values and life goals motivate the different groups in our society - thereby providing insight as to how these groups can be moved (e.g., via media use, communication preferences, educational programmes, etc.). For more on this, see the appendix.

The end of the middle class as we knew it

Since society is constantly changing, its constituent social milieus are also constantly in motion. On the one hand, the fluctuation of socially dominant values leads to shifts in the milieu landscape. On the other hand, every generation of young people is confronted with new sets or hierarchies of values, which can then lead to the formation of completely new milieus. Values, in turn, change as a result of the events and developments that permanently alter society. In contemporary Germany, key events and developments are, among others: climate change, migration, the pluralisation of lifestyles, the increasing polarisation of wealth, digitalisation, and the aestheticisation of everyday life. Over the course of recent decades, these megatrends have led to ongoing changes in the milieu panorama.

The following developments in particular have changed the milieu landscape in Germany:

1. *Tensions and reconfiguration within the middle class*

The most significant socio-cultural shifts in Germany are currently emanating from the centre of society. The clusters of like-minded people that have historically formed the middle class are drifting apart. The status-conscious and optimistic fraction is modernising and looking upwards. The larger, harmony-oriented fraction sees its lifestyle and principles devalued by society and has begun to withdraw, self-consciously differentiating itself from both those above (the "elites") and those below (the "underclass"). Social cohesion is decreasing because the shared belief in continuous gains in prosperity and security is eroding.

2. Sustainability, resilience and diversity as new core values

Sustainability has become a society-wide norm, and is thus guiding everyday actions in more and more milieus. Sustainability is no longer a question of "yes" or "no", but of "how". In the face of new distribution struggles, this leads to concerns about inclusion and fears of higher living costs in parts of the middle and lower classes. Although the concept of sustainability is acceptable to the majority today, this concept is understood and lived in very different ways in each milieu.

Because the pressure for autonomy and self-determination has continued to grow in the modern high-status segment of society, the ability to change and agile crisis management (resilience) have become core competencies. These competencies strengthen the influence of the new leading milieu. At the peak of society, a new cosmopolitan elite has emerged.

Older, traditional social groups have also modernised to some extent. Across all milieus, the acceptance of pluralised lifestyles has increased. Diversity has established itself as a new social norm.

New milieus offer hope

The Adaptive-Pragmatic Middle Class Milieu is moving into the centre of the social mainstream, taking the place of the former Modern Mainstream Milieu, which is worried about decline. The Nostalgic Middle Class Milieu is retreating into a niche, and is becoming increasingly critical of the social and political system.

Due to the growing importance of sustainability and climate protection, the former Liberal-Intellectual and Social-Ecological Milieus have merged into a new social leadership milieu: the Post-Materialist Milieu. In addition, a new milieu has emerged that sees itself as a driver of social transformation: the Neo-Ecological Milieu, which focuses on global networking, social added value, and post-growth ideals. In this new milieu discovered by SINUS, the mixture of values is particularly colourful: typical representatives are at the same time progressive and realistic, pragmatic and eager to experiment, success-oriented and party-loving, determined and relaxed.

At the same time, we observe a declining hedonistic mentality in the other milieus, resulting in the end of the much-cited "German fun-loving society" (*Deutsche Spaßgesellschaft*). A fraction of the Consumer-Hedonist Milieu, while still focused on consumption and entertainment, now sees itself as part of the new middle class and as a bulwark against the "political correctness" of the progressive elite.

A graphic of the current milieu landscape in Germany, brief descriptions of the new Sinus-Milieus, and representative images can be found in the attachment. The press graphics can be downloaded free of charge at the following link: <https://www.sinus-institut.de/en/media-center/press-releases/sinus-milieus-2021>

About SINUS-Institut

SINUS Markt- und Sozialforschung GmbH, with offices in Heidelberg and Berlin, has specialised in psychological and social science research and consulting for over 40 years. SINUS develops strategies for companies and institutions that use socio-cultural change as a success factor.

A key tool is the Sinus-Milieus model - a model of society and target groups that summarises people according to their lifestyles in "groups of like-minded people". For decades, the Sinus-Milieus have been one of the best-known and most influential segmentation approaches in the German-speaking market and are available for over 48 countries.

SINUS cooperates closely with its sister companies INTEGRAL Markt- und Meinungsforschung in Vienna, Austria, and OPINION Market Research & Consulting, Nuremberg, Germany (INTEGRAL-SINUS-OPINION Group).

More information on SINUS-Institut at www.sinus-institut.de.

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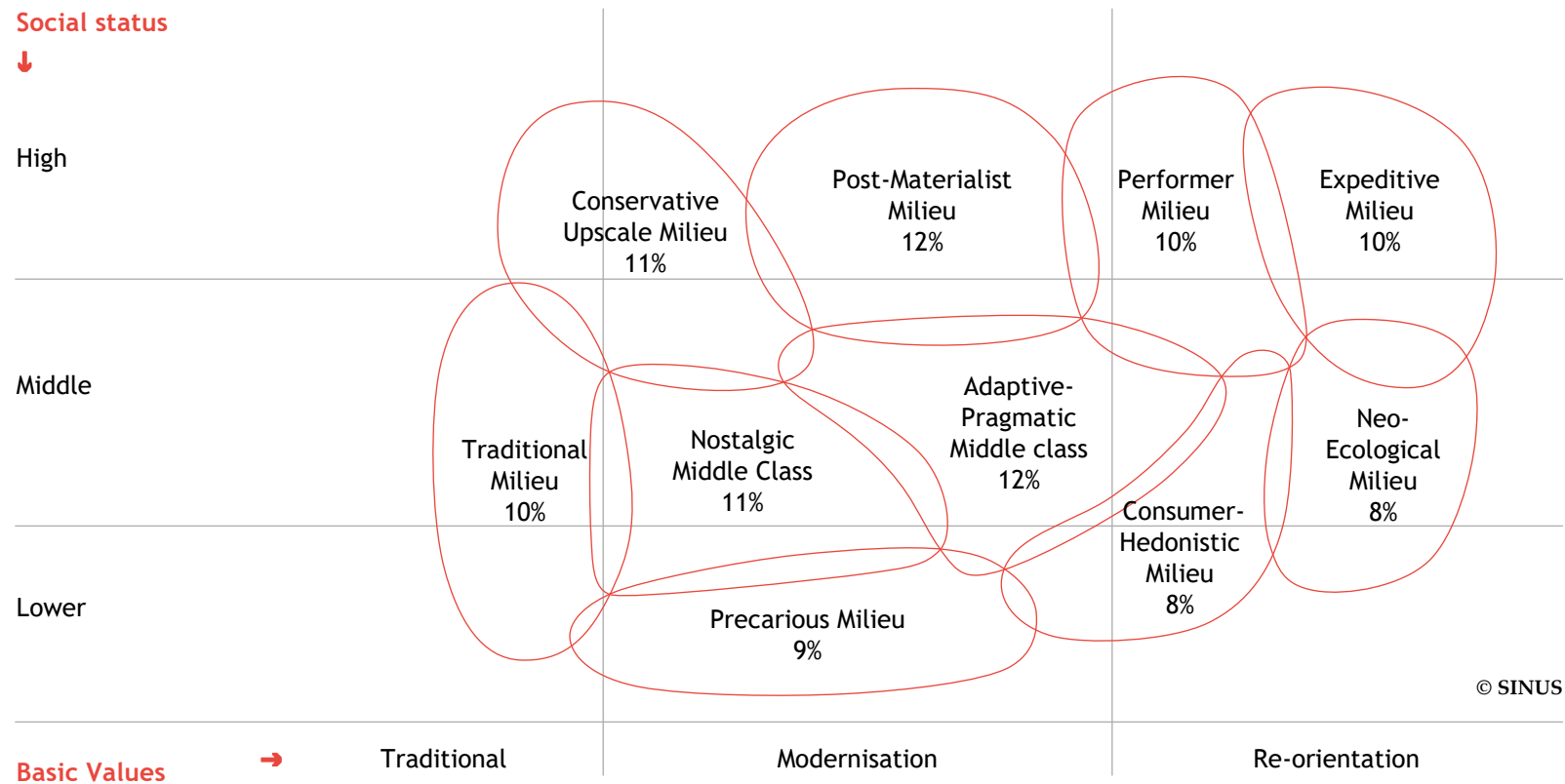
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Sinus-Milieus® in Germany 2021

Social Status and Basic Values



Short introduction of the Sinus-Milieus®

Overview



Conservative Upscale Milieu
The older, structural conservative elite



Post-Materialist Milieu
The sovereign educated elite with post-material roots



Performer Milieu
Efficiency- and progress-oriented technocratic high achievers



Expeditive Milieu
Ambitious creative bohemians looking for new frontiers



Neo-Ecological Milieu
The drivers of global social change



Adaptive-Pragmatic Middle Class
The modern social mainstream



Consumer-Hedonistic Milieu
The consumption- and entertainment-focused lower middle class



Precarious Milieu
The lower class striving for orientation and participation



Nostalgic Middle-Class
Harmony-oriented middle- and working-class centre of society



Traditional Milieu
The security- and order-loving older generation

Sinus-Milieus® in Germany 2021

Short descriptions

Conservative Upscale Milieu

The older, structurally conservative elite: classical ethics of responsibility and success, as well as claims to exclusivity and status; desire for order and balance; self-image as a stable rock amidst the tide of postmodern arbitrariness; gradual erosion of social leadership role.

Expeditive Milieu

The ambitious creative bohemians: urban, hip, digital, cosmopolitan, and networked; in search of new frontiers and unconventional experiences, solutions, and successes; skilled at self-expression and self-branding; self-image as postmodern movers and shakers.

Consumer-Hedonistic Milieu

The consumption- and entertainment-focused lower middle class: fun in the here and now; self-image as cool lifestyle mainstream; strong need for recognition; balance of professional adaptation vs. hedonistic escapism; sometimes annoyed by the dictates of sustainability and political correctness.

Post-Materialist Milieu

The socially committed, sovereign educated elite with post-material roots: self-determination and self-development, as well as orientation towards the common good; advocates of sustainability, inclusion, and diversity; self-image as critical and humanistic.

Neo-Ecological Milieu

The drivers of global transformations: optimism and an upbeat mentality combined with a pronounced awareness of planetary challenges; open to new value syntheses (disruption and pragmatism, success and sustainability, party and protest); self-image as progressive realists; environmentally aware and climate-conscious lifestyle.

Precarious Milieu

The lower class striving for orientation and participation: trying to keep up with the standard of living of the broad “middle class” but burdened by social disadvantages and exclusions; feeling of being left behind; some bitterness and resentment; self-image as a hard worker and tenacious survivor.

Performer Milieu

Efficiency- and progress-oriented technocratic high achievers: global economic thinking; liberal social perspective based on personal freedom and responsibility; self-image as the modern economic elite and as lifestyle pioneers; high affinity for all things tech and digital.

Adaptive-Pragmatic Middle Class

The modern social mainstream: willingness to adapt and perform; utilitarian thinking, but also a desire for fun and entertainment; strong need for anchoring and belonging; some dissatisfaction and uncertainty regarding current social developments; self-image as flexible pragmatists.

Nostalgic Middle Class

The harmony-oriented middle- and working-class centre of society: desire for secure circumstances and an appropriate status; self-image as the social middle-field, but growing sense of alienation and fear of downwards social mobility; perceived loss of learned rules and certainties; longing for the “good old days”.

Traditional Milieu

The security- and order-loving older generation: entrenched in traditional petit-bourgeois and/or working-class culture; undemanding adaptation to necessities; increasing acceptance of the new sustainability norm; self-image as the upstanding and respectable “salt of the earth”.

What are Sinus-Milieus®?

Sinus-Milieus are groups of like-minded people.

The Sinus-Milieus are a social model. They were developed by SINUS over 40 years ago, and are considered the gold standard for psychographic target group segmentation in the German-speaking market. The Sinus-Milieus cluster people into groups on the basis of similar values, lifestyles, and social situations. The Sinus-Milieus reveal the values and goals that motivate the different groups in our society - thereby providing insight as to how these groups can be moved (e.g., via media use, communication preferences, educational programmes, etc.).

The Sinus-Milieus provide a true-to-life picture of the diversity that actually exists in society by precisely describing people's sensibilities, orientations, values, goals, lifestyles, attitudes, and social situations, all against the background of socio-cultural change. Basic value orientations are included in the Sinus-Milieu analysis, as are everyday attitudes toward work, family, society, leisure, money, and consumption. The Sinus-Milieus thus look at individuals and the entire frame of reference of their living environments or “lifeworlds” in a systematic and holistic way.

With the Sinus-Milieus, one can understand people's lifeworlds “from the inside out” by immersing oneself in their practices and preferences. This offers clear perspective on which target groups will determine the future. It also provides marketers and communication professionals with more granular information and better decision support than conventional target group approaches.

Who can benefit from the Sinus-Milieus model?

The areas of application of the Sinus-Milieus are wide-ranging. Besides political science, public health, and the sociology of education and religion, they have been effectively used in classical market research on nearly every category of product and service. They allow for a differentiated description of customer and buyer groups, as well as persona creation, targeted positioning of products and services, definition of market segments for new products and relaunches, detection of market niches, quantification of market potential, and early detection and localisation of new motivations and attitudes.

The integration of the Sinus-Milieus into the major German market media studies (Best4Planning, VuMA) and international TGI Consumer Data, as well as into the AGF/GfK German television panel, offers efficient possibilities for optimised media evaluation and planning. With the Sinus-Milieus in Microgeography, the geospatial enrichment of customer databases is possible, and with it, enhanced direct marketing and spatial planning. With the Digital Sinus-Milieus, target-group-specific website analysis and branding can be leveraged for cross-media targeting success.

The Sinus-Milieus are target groups as they really exist. They provide an empirically grounded pivot point for product development, strategy, positioning, communication, media planning, and CRM.