globalwebindex

Millennials

Examining the attitudes and digital behaviors of internet users aged 23-36

AUDIENCE REPORT 2019

www.globalwebindex.com

Contents

Introduction

GlobalWebIndex Audience reports are designed to examine the digital behaviors of a particular group – showcasing trends over time as well as analyzing how the audiences in question compare to the overall internet population. In this report, we place the spotlight on **millennials** – those internet users who are aged 23-36. This report focuses on:

- **Profiling millennials** – what are the defining characteristics of this group and how can brands target millennial students, home-owners, and mums?
- **Device usage and online privacy** – which devices does this audience own and which of them demand most of their time? Why are millennials blocking ads?
- **Media consumption** – are millennials shifting their entertainment consumption wholly online or does traditional media still play a role in their lives?
- **Entertainment** – how are millennials engaging with subscription streaming platforms around the world and what are their gaming habits?
- **Social media engagement** – what are millennials' favorite social media platforms and who do they "follow" on these services?
- **The purchase journey** – how does this audience discover, research and interact with brands? What can brands do to appeal to a millennial?

Key Findings

Millennials are not a uniform consumer segment. Aged between 23 and 36, millennials can no longer be seen as synonymous with fresh-faced, carefree youths. They are a diverse group with unique characteristics depending on their life stages. While 36% of those in their twenties haven't left their homes, 65% of those in their thirties are already settling down and getting married.

Although millennials are mobile-first, a multi-device strategy is needed for full engagement. Practically all millennial internet users own a smartphone and are spending longer online via mobile than via PCs, laptops and tablets combined. Across most social, entertainment and online commerce activities, mobiles are the preferred devices for this group. However, millennials are multi-device users and mobiles are not used in isolation – they are rather complemented by the bigger screens.

Ad-blocking is prominent but branded content can engage. Although 56% of millennials globally block ads, they are no more privacy conscious than the average internet user. Ad-frustration is driving this group to deploy ad-blockers, though due to selective ad-blocking this means they do have some ad exposure online. However, it's important to note that throughout the sales funnel, entertaining content is more impactful than average for this group.

Millennials haven't given up traditional forms of entertainment just yet. Cord-cutting is increasingly gaining popularity, but broadcast TV is still important to this generation. Linear TV, where they average 1h 53m per day, is the second-most popular media source for this group after social networks. Time spent on music and TV streaming is on the rise, but millennials spend slightly longer on the former.

Entertainment drives social engagement, across a range of platforms and increasingly via video. Having an average of 9 accounts, millennials are comfortable multi-networking. 1 in 2 millennials outside China have engaged with video on the major social platforms in the last month, and they are more likely to identify social media as a route to entertainment than a place to share personal opinion and information.

Social networks are key to the purchase journey but not yet the purchase transaction. Social media is the second-most important product research channel for millennials after search engines, but this audience is still turning to traditional commerce websites to complete purchases. Brands should be careful to take an omni-channel approach to social commerce, recognizing that it holds a greater role in brand research and discovery than it currently does for completing purchases.

Millennials

Profiling Millennials

Profiling Millennials

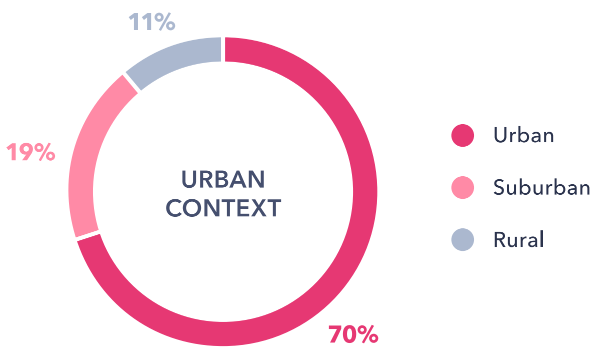
65% OF OLDER MILLENNIALS AGED 30-36 **ARE MARRIED**

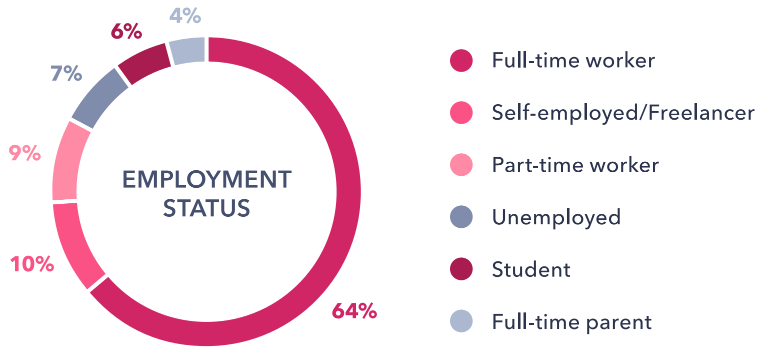
36% OF YOUNGER MILLENNIALS AGED 23-29 **LIVE WITH THEIR PARENTS**

46% OF ALL MILLENNIALS **ARE PARENTS**

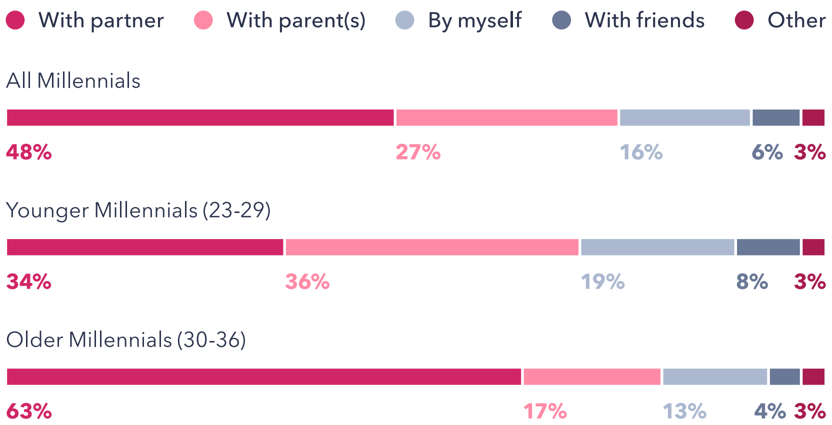
Profiling Millennials

% of internet users who are millennials

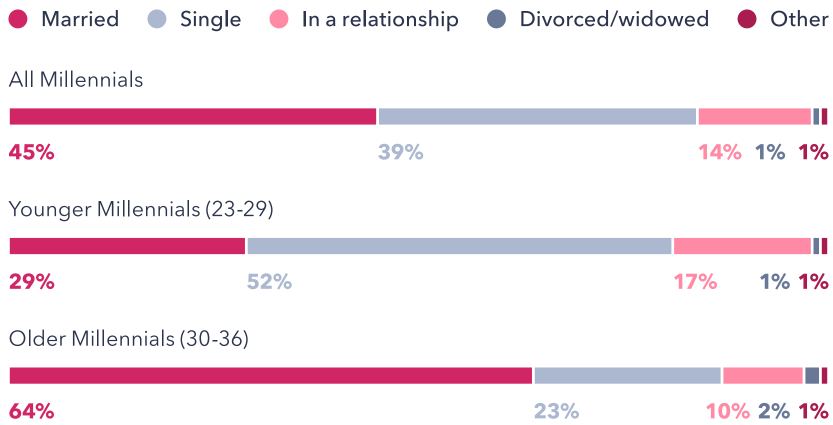




LIVING SITUATION



MARITAL STATUS



Source: GlobalWebIndex Q1 2019 **Base:** 52,506 Internet Users Aged 23-36, 26,878 Internet Users Aged 23-29 and 25,628 Internet Users Aged 30-36

Millennial Milestones

Born between early 1980s and mid-1990s, millennials represent the 20th century last generation and the first one to be raised with the break of the Information Age, during a technological revolution. They grew up with the emergence of the internet as a mass medium and the launch of the smartphone with the "Angler" prototype in 1992.

While the youngest were not even teenagers when Facebook was founded, the oldest were in their mid-20s, building their first global social media profiles. In the same fashion, when the youngest were just entering high school, the oldest were much more impacted during the 2008 economic recession. All of this illustrates what an elusive and diverse bunch millennials are.

And while some still think of them as carefree teenagers, the oldest are in their mid-30s and 93% of today's millennials are financially independent household-earners. Aged 23-36, this audience represents the bulk of the workforce and accounts for a **quarter** of the world's population. As a result, millennials hold an enormous degree of spending power. In fact, it is **estimated** that their annual income will exceed $4tn by 2030.

Millennial Milestones

MILLENNIAL STUDENTS

6% of all millennials are students.

The typical millennial student is most likely a 26-year-old male studying for an undergraduate degree. The majority are single (74%) and still living with their parents (56%).

Compared to the average millennial internet user, millennial students are more likely to be interested in **science** (1.28 Index) and **gaming** (1.22), while the largest proportion of them are drawn by popular culture, and interests like **music** (66%) and **films** (58%).

They are much more likely than the average millennial outside China to visit **Snapchat** more than once a day (1.28 Index) and they're most likely doing it to **fill up spare time**, or to find entertaining content from singers, musicians or brands.

How to reach them? Millennial students are disruptors of the status quo, they seek new experiences and are hungry for knowledge. A brand that stays in its comfort zone won't be of interest to this audience. The most value-driven requests they have for their favorite brands are to **provide innovative new products** (28%) and to **improve their knowledge and skills** (27%).

MILLENNIAL HOME-OWNERS

71% of all millennials are home-owners.

The average millennial home-owners are in their late twenties/early thirties, 74% of them are working full-time, most likely in a general management role.

Around a quarter are buying properties as an investment. Meanwhile, **6 in 10 own one property outright**, while 1 in 3 have acquired it with a mortgage.

Millennial home-owners are **seen as adventurous** and they're not afraid to take risks. They're not only **proactive about investing money**, but also **don't shy away from borrowing it** (27% more likely than the average millennial).

How to reach them? Millennial home-owners are avid social networkers. They spend an average of **2 hours and 50 minutes per day on social media**, which is around 23 minutes longer than the average internet user. They do so mainly **to stay up-to-date with news and current events (41%)**, but also **to find entertaining content (39%)**. This is the ideal audience for brands to reach and sell on social media, but **ads won't engage them as much**. They are less likely than the average millennial to discover brands via social media or TV ads, but more likely to do so via **celebrity endorsements**. On top of that, **63% like to seek an expert opinion** before purchasing.

MILLENNIAL MUMS

52% of female millennials are mums.

The average millennial mum is 31 years old, married (81%) and with one child (66%).

They're an **image conscious** audience that loves to keep up with the latest fashions, and they **can be great influencers on social media**. 7 in 10 regularly inform their family and friends on new products and their primary reason for using social networks is to **share details of their personal lives**. If brands provide them with **high-quality products** and **rewards** like discounts and free gifts, they'll be happy to advocate for them.

How to reach them? Millennial mums average **2h 17m watching broadcast TV every day**, which is more than 20 minutes longer than the average millennial. They're **most likely watching at prime time** between 7pm and 10pm, and **Disney Channel** is their go-to as a fifth of them say they're watching it every day or most days. This is good news for brands because **TV ads (37%) are millennials mums' most popular source of brand discovery** and 56% say they tend to buy brands they see advertised. In order to appeal to them though, brands need to produce **eco-friendly products**. A quarter list this as their top brand request and **63% would pay more for it.**

Base: 3,081 millennial students, 26,054 millennial home-owners and 12,920 millennial mums

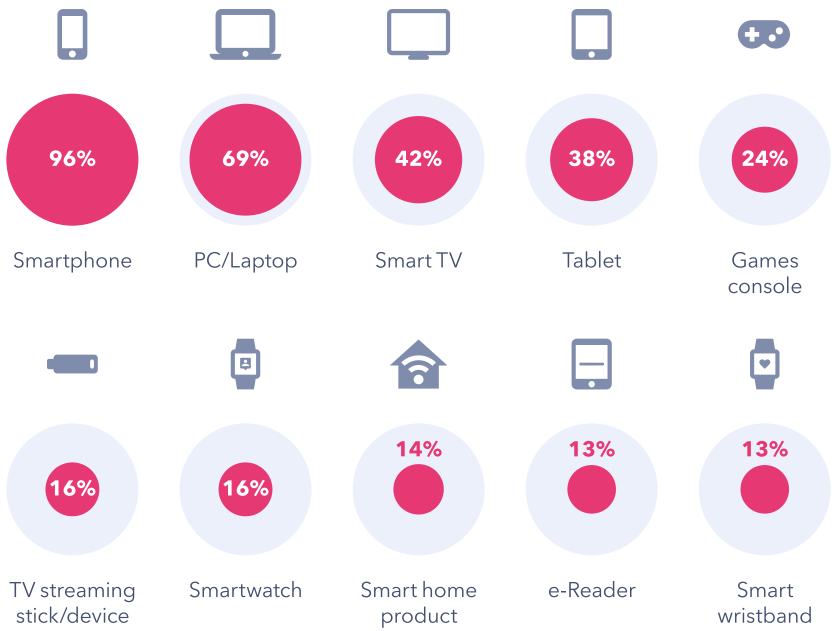
Millennials

Device Usage & Online Activities

Device Ownership

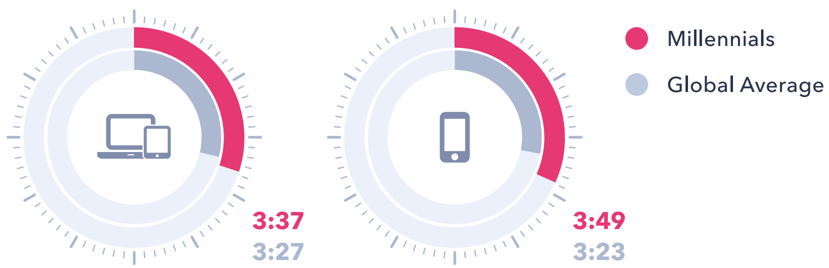
Device Ownership

% of millennials who own the following devices



Time Spent Online

Average time spent in hh:mm on the following devices each day



Mirroring the global trend, **smartphones are universally owned by millennials** and are central to their digital lives: today, they are commanding a 27-percentage-point lead over PCs and laptops.

Although smartphones are the most commonly owned across all markets GlobalWebIndex tracks, **millennials in emerging markets**, where the widespread consumer access to the internet is a relatively new phenomenon, **are the most mobile-centric**. Morocco, in particular, stands out as the market with the largest **gap of 74 percentage points between mobile and PC ownership**, where **as little as a quarter of millennials have the latter**. In contrast, in mature markets like **Russia, Canada and Poland**, where old habits are still deeply entrenched in digital behaviors, **the desktop is still an integral part of millennials' lives**, and above 85% own one.

Nevertheless, millennials (especially older representatives) are multi-device users, and **although mobiles take precedence, they are not used in isolation**. In fact, **millennials get online with an average of 3 devices**, illustrating the seamlessness with which this audience expects to access sites and services on multiple devices each day.

Moreover, **they spend only around 12 minutes longer online on their mobiles compared to PCs, laptops and tablets**. This means that while mobile usage may be cannibalizing time spent on computers to some extent, they should be seen more as a complementary screen serving a different purpose, and one which can be used on the go.

> Although mobiles are central to millennials' everyday lives, they are not used in isolation.

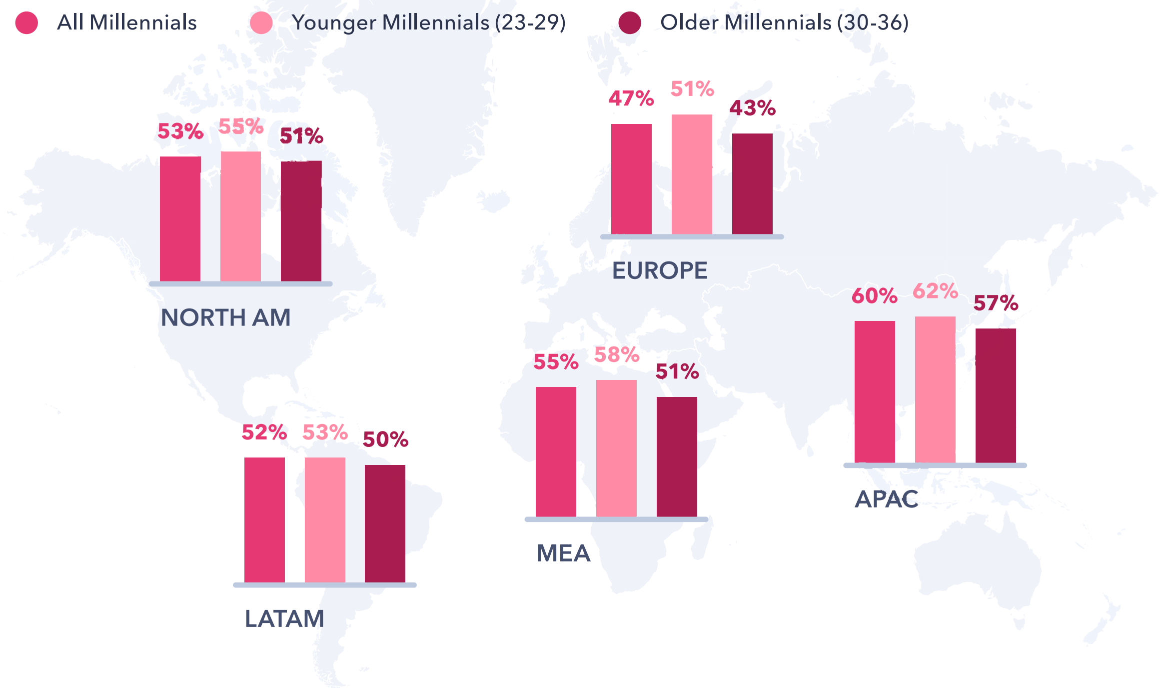
Question: Which of the following devices do you own? **Source:** GlobalWebIndex Q1 2019 **Base:** 52,506 Internet Users Aged 23-36

Question: Roughly how many hours do you spend online on a PC/laptop/tablet/mobile during a typical day? **Source:** GlobalWebIndex Q1 2019 **Base:** 41,633 Internet Users Aged 23-36 and 139,397 Internet Users Aged 16-64

Online Privacy

Ad-Blocking By Region

% who have used an ad-blocker in the last month across the following regions



Top 5 Ad-Blocking Motivations

% of millennial ad-blockers who block ads for the following reasons

47% There are too many ads on the internet

46% Too many ads are annoying or irrelevant

44% Ads are too intrusive

37% Ads sometimes contain viruses or bugs

37% Ads take up too much screen space

Fueled by the multitude of data breach scandals, privacy and cybersecurity have been key concerns with many consumer groups for the past couple of years. Our attitudinal data reveals that **millennials are no more privacy conscious than the average internet user** though. 62% fit this profile defined in our **segmentation** as those who value privacy and worry about loss of personal data. Nevertheless, **56% of millennials globally use ad-blockers**, rising to 62% among their younger counterparts in APAC where ad-blocking has reached highest levels for this audience.

Ad-frustration is the primary reason why millennials choose to block ads, with almost half saying that there are too many ads on the internet, and that ads are annoying or irrelevant. Evidently, **poor user experience lies at the heart of the issue** – something that has undoubtedly worsened as millennials spend more and more time on mobiles, with their smaller (and more easily invaded) screens. However, stopping ads from being personalized based on their browsing history is the very last reason that only 22% of millennial ad-blockers give for this activity. Therefore, **serving fewer and more relevant ads is one strategy that brands can choose to reach and engage this audience**.

Questions: In the last month, which of these have you done? Used an ad-blocker to stop ads being displayed // Why do you use an ad-blocker? **Source:** GlobalWebIndex Q1 2019 **Base:** 20,792 Internet Users Aged 23-29, 20,841 Internet Users Aged 30-36 and 21,472 Millennial Ad-Blockers

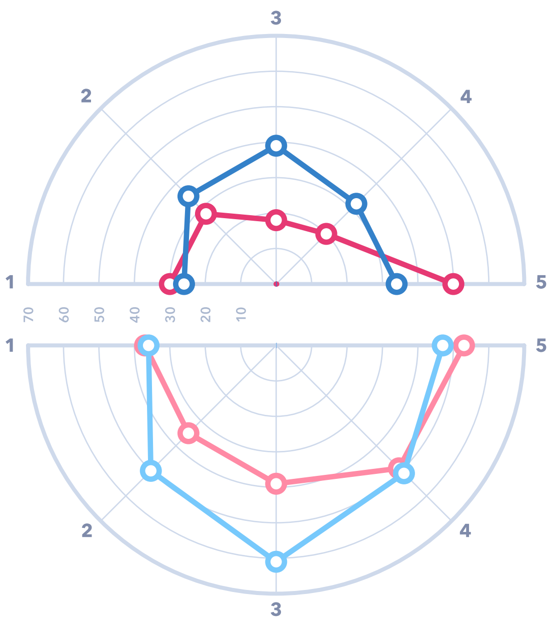
Mobile Brands

iPhone vs Samsung

% of millennials who own/would consider purchasing the following mobile brands

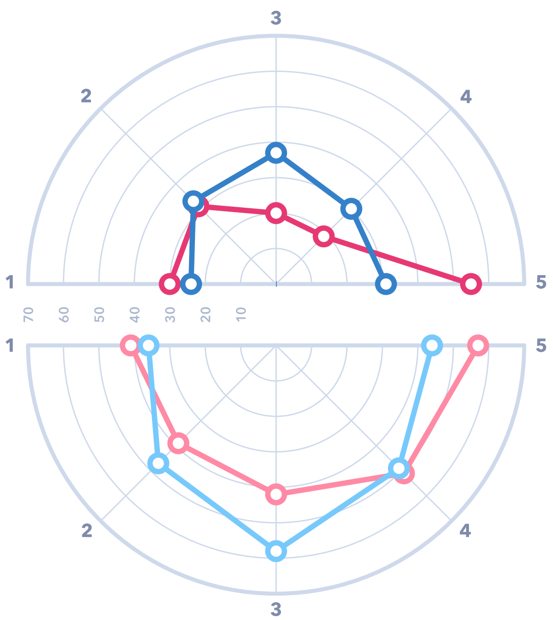
iPhone — Currently own — Would consider purchasing   SAMSUNG — Currently own — Would consider purchasing

ALL MILLENNIALS



	iPhone currently own	Samsung currently own	iPhone would consider	Samsung would consider
1. APAC	30%	26%	37%	36%
2. Europe	28%	35%	35%	50%
3. Lat Am	18%	39%	39%	61%
4. MEA	20%	32%	49%	51%
5. North Am	50%	34%	53%	47%

YOUNGER MILLENNIALS (23-29)



	iPhone currently own	Samsung currently own	iPhone would consider	Samsung would consider
1. APAC	30%	24%	41%	36%
2. Europe	31%	33%	39%	47%
3. Lat Am	20%	37%	42%	58%
4. MEA	19%	30%	51%	49%
5. North Am	55%	31%	57%	44%

OLDER MILLENNIALS (30-36)

	iPhone currently own	Samsung currently own	iPhone would consider	Samsung would consider
1. APAC	29%	28%	33%	36%
2. Europe	25%	37%	30%	53%
3. Lat Am	17%	42%	35%	64%
4. MEA	21%	36%	47%	54%
5. North Am	45%	37%	50%	50%

Questions: Which of the following mobile brands do you currently own? // Which brand(s) would be your top choice when you next upgrade or buy a new mobile phone? **Source:** GlobalWebIndex Q1 2019 **Base:** 20,792 Internet Users Aged 23-29 and 20,841 Internet Users Aged 30-36

Mobile Brands

Samsung (30%) and iPhone (29%) have reached near parity for current brand ownership, but the former takes a small precedence over the latter as the favored choice for millennials to upgrade to, reaching 42% in early 2019.

These figures don't hold when we look at regional variations between younger and older millennials though. **Younger millennials in APAC are more likely to own an iPhone, while their older counterparts don't really show a preference.** This trend is reversed in Europe – Samsung holds the advantage for older millennials here, while those aged 23-29 express only a marginal preference towards the brand.

When it comes to future consideration, it seems that **Samsung has increased its appeal in North America**, where older millennials are equally divided between the two brands. Younger millennials here, as well as in APAC and MEA, are still slightly more likely to choose the iPhone as a next upgrade above Samsung, but this might change soon.

Both iPhone and Samsung in MEA face strong competition from Huawei as 39% of millennials here would consider purchasing their next mobile from the brand. This shows that the mobile phone market is more than just a two-horse race.

> Samsung is most likely to be millennials' top choice for next upgrade in Latin America, with considerable distance from iPhone.

TREND IN ACTION

Huawei Growth in UAE

As reported by **The National**, Huawei's subsidiary company Honor has reached record numbers in revenue last year in the UAE. With its budget smartphones, Honor numbered $12 billion, or a 170% growth in 2018.

The Chinese brand is posing a challenge in the smartphone market to both global giants Apple and Samsung, especially with the millennial audience. Its 8X model, a mobile marketed to millennials with a colorful design and sub-$300 price tag, has reached an impressive 10 million sales over the course of only half a year.

Millennials

Media Consumption

Online vs. Offline Media

The anywhere-anytime access to smartphones ensures millennials continue to consume entertainment while on the move. Today, **all entertainment-related activities (barring TV) are mobile-first, and they're increasingly becoming mobile-only**.

More than a quarter of millennials watch videos on their smartphones only

Compared to the global average, millennials spend more time on all forms of media we track, but broadcast TV and radio, which they consume to the same extent as all internet users. **Social media is a popular form of entertainment in its own right**, taking up an average of 2h 44m of a millennial's day, or around 50 minutes longer than watching TV. **But the importance of broadcast TV shouldn't be disregarded** as this audience still spends more time there than its online equivalents.

Music streaming is also an above-average entertainment source of millennials, taking up more than an hour and a half of their day. The popularity of ad-supported models and account sharing is apparent as 78% of this group have used a music-sharing service in the past month on any device, but only 27% report paying for one.

Time Spent on Entertainment

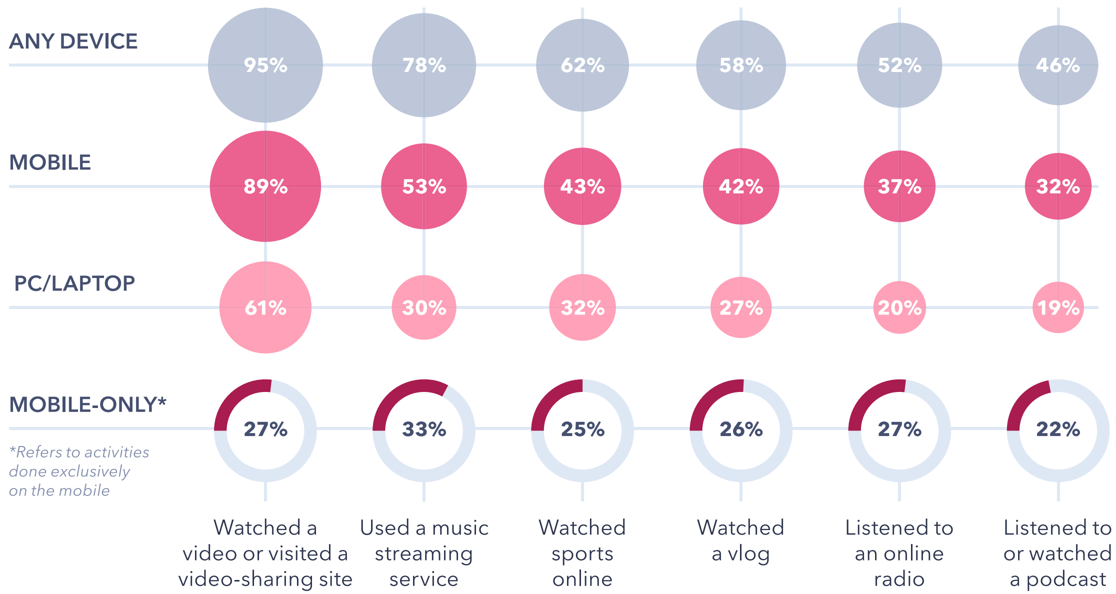
Average time spent in hh:mm on the following each day

ONLINE	Millennials	Global Average
Social Media	2:44	2:26
Online TV & Streaming	1:31	1:17
Music Streaming	1:37	1:23
Online Press	1:19	1:07

OFFLINE	Millennials	Global Average
Linear TV	1:53	1:58
Broadcast Radio	1:00	1:00
Print Press	0:55	0:48
Console Gaming	1:20	1:07

Online Entertainment By Device

% of millennials who have done the following online in the last month on the following devices

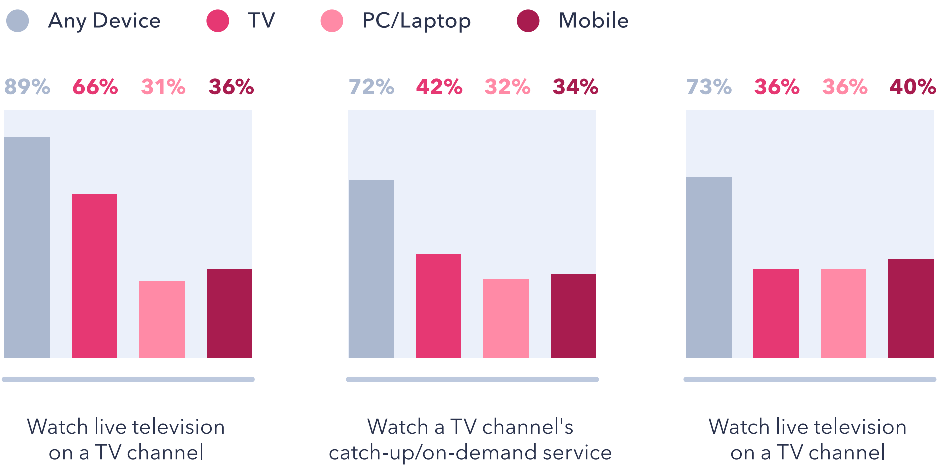


Questions: On average, how long do you spend on these content/media during a typical day? // In the past month, which of the following things have you done on the internet via PC/laptop/mobile? **Source:** GlobalWebIndex Q1 2019 **Base:** 41,633 Internet Users Aged 23-36 and 139,397 Internet Users Aged 16-64

Engagement with TV

TV Engagement by Device

% of millennials who have used the following devices in the past month to…



34% HAVE WATCHED CONTENT ON A TV BY MIRRORING OR CASTING IT VIA THEIR PHONE

Millennials are still more likely to have watched live TV than they are subscription services on their TV sets, but the opposite applies for the smaller screens of PCs and mobiles. As of yet, more millennials watch streaming services on their mobiles than TVs and desktops.

More than a fifth of millennials who watch subscription services like Netflix on their TV say they mirror or cast content via their phone

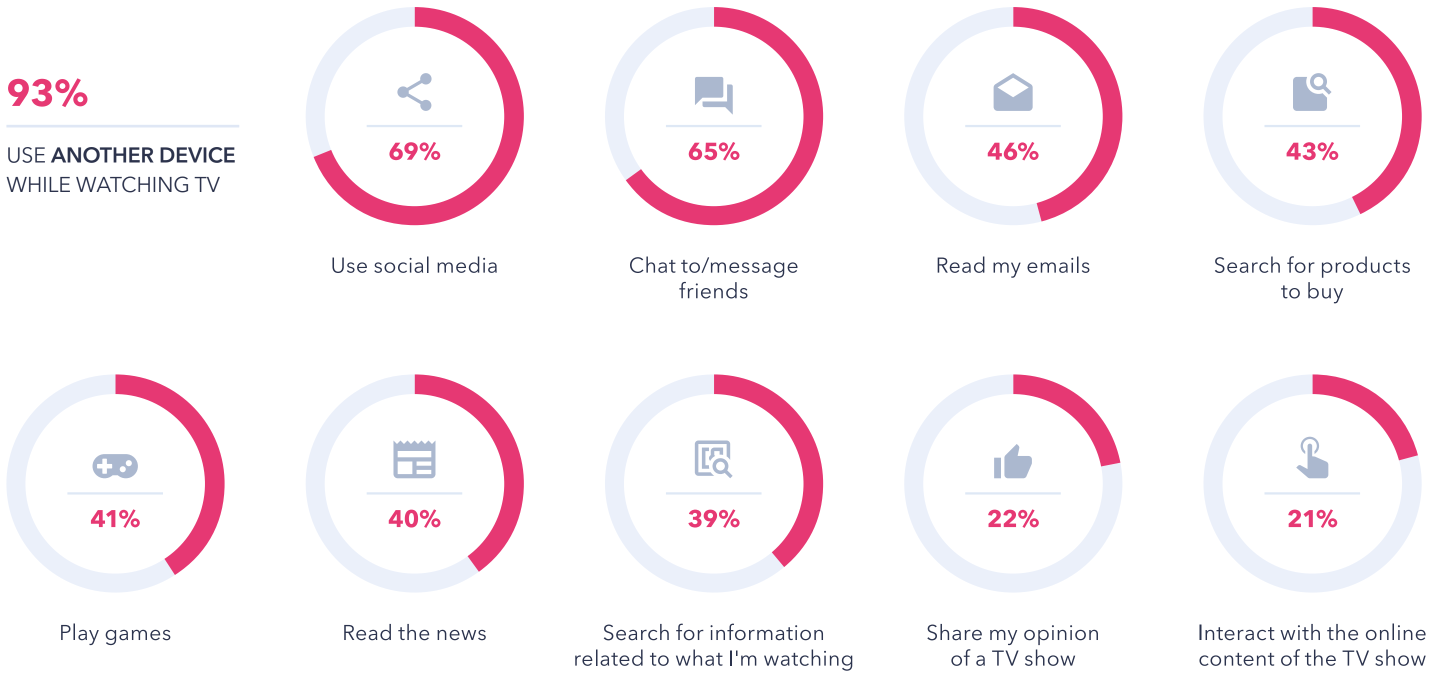
However, with the proliferation of Smart TVs and built-in Netflix functions, **TV sets are challenging smartphones for engagement with streaming services and this is likely to continue**. In fact, millennials are more likely to choose the TV as their preferred device for this than the mobile in all regions, but APAC. Moreover, globally, their engagement with subscription services on TVs has increased by three percentage points over the course of only a quarter.

Questions: Which of these have you done on your mobile in the last month? // In the past month, which devices have you used to do the following? **Source:** GlobalWebIndex Q1 2019 **Base:** 41,633 Internet Users Aged 23-36

Second-Screening

Second-Screen Activities

% of millennials who say they do these things while watching TV



Second-screening is a firmly mainstream activity among this group. 93% of millennials say they are using another device while watching TV, with mobiles central to this (87% are dual screening via their phone).

Millennials are most likely to be heading to social media when they second-screen, **with 69% social networking and 65% messaging friends**. While second-screening holds potential as a touch point with an audience, in the case of millennials, **the most popular activities are used as a distraction from what is on screen, not an extension of it.**

Although only around a fifth interact with the online content and share their opinions of the TV shows they're watching, **they are 27% above average to do so**. This suggests that there is potential to engage this generation on social media and encourage them to post commentary while they're watching TV.

Question: Which of these things do you do online when watching TV?
Source: GlobalWebIndex Q1 2019 **Base:** 41,633 Internet Users Aged 23-36

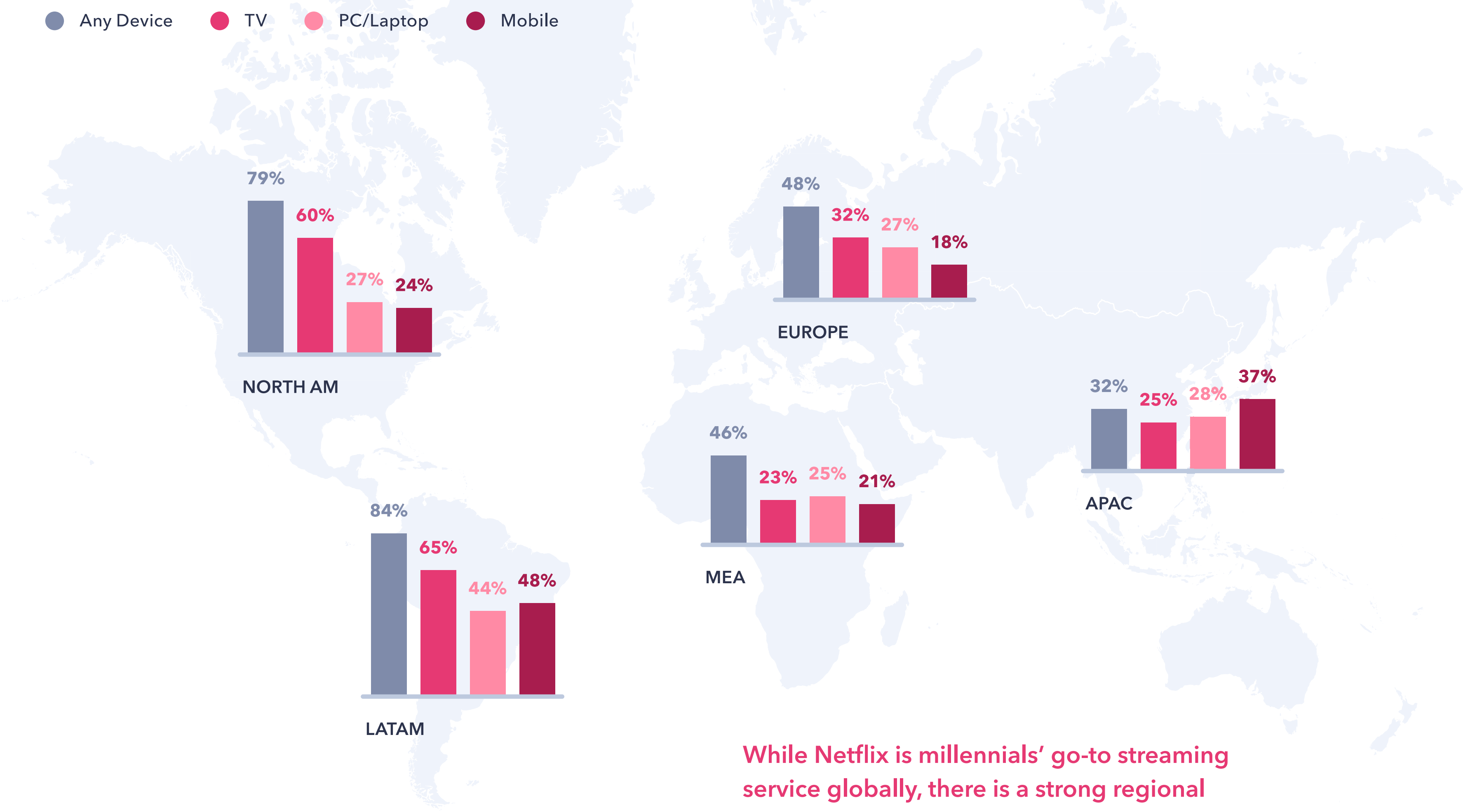
Millennials

Entertainment

SVOD services: **Netflix in the spotlight**

Netflix Around the World

% of millennials outside China who have used the following devices to watch Netflix in the last month across the following regions



While Netflix is millennials' go-to streaming service globally, there is a strong regional and market-level variation

Question: Which devices have you used to watch these services in the last 30 days? Please select all devices that apply to each service. **Source:** GlobalWebIndex Q1 2019 **Base:** 34,660 internet users outside China aged 23-36

SVOD services: **Netflix in the spotlight**

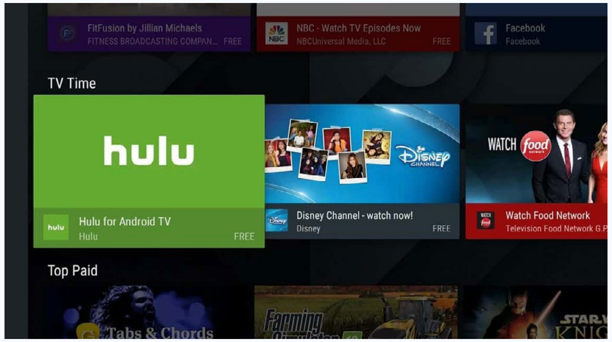
Netflix may be the service most widely associated with TV streaming, but **its penetration in the content-rich markets of LatAm (84%) and North America (79%) is far greater than any other region**. Millennials in these markets are also more likely to have used their TV to watch it than any other device. This is not the case in MEA yet, where this audience is still slightly more likely to choose their PCs or laptops for this above TV sets and mobiles.

Although local competition in the Asia Pacific region is high, engagement with Netflix here shouldn't be underestimated. The figure grew from 32% to 53% when we removed China from the equation, making **Netflix the top streaming service millennials use in that region**. Meanwhile, iQiyi emerges as the leader in China with a 74% engagement rate, closely followed by YouKu & Tudou at 67%.

And while many would think that Netflix in North America faces strongest competition from Amazon Prime Video due to the popularity of the brand as a retailer, this is no longer the case since the end of last year. It is Hulu which emerges as the second-most popular service here after a four-percentage-point spike in engagement between Q3 and Q4 2018.

Within Europe, national services such as BBC iPlayer in the UK, MyTF1 in France and VK in Russia offer stiffer competition, taking a 43%, 46% and a 58% audience share in their respective home markets.

Why is Hulu so popular in the U.S.?



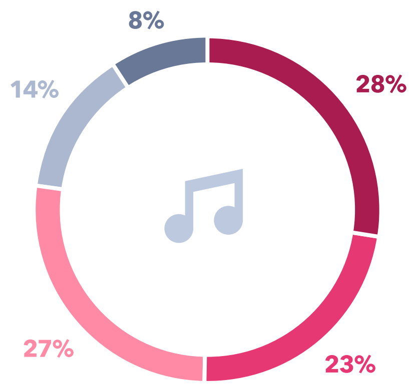
Subscription video on demand service, Hulu in the U.S. is definitely one service that is keeping Netflix and Amazon Prime Video on their toes at the moment. Although the platform has been prominent in the market since its launch in 2008, it wasn't until the beginning of 2018 when Kevin Mayer, Disney's chief strategy officer, **announced** plans of investing in the service, that it started receiving considerable attention.

Fast forward to 2019 and Walt Disney **became** a majority owner of the platform. The company acquired a third of stakes in Hulu and took full control of the streaming service, with plans to integrate it into its business operations. Meanwhile, Hulu's price dropped from $7.99 to $5.99 per month, while Netflix's and Amazon's cheapest offerings are $8.99 and $12.99, respectively. All of this has meant that Hulu's subscriber-base **increased** by almost 4 million from the start of the year, reaching 28 million subscribers, or double Netflix's figure.

Music Streaming

Music Ownership vs. Access

% of millennials who select the following point on the scale when asked about their preference of streaming/owning music



1. I prefer to access music via online services, without owning the songs themselves

5. I prefer to own the songs I listen to (e.g. by purchasing albums or paying for downloads)

Mirroring the global trend, **millennials' music habits are influenced by the possibilities of on-demand media**; more choose to access songs via streaming than by owning them outright through physical purchases or downloads. This is especially the case in Latin America and Europe where 42% and 36% of this group say so.

Although Google Play Music sits at the top of the global music streaming market among millennials, Spotify is the leader in its native Europe and the Americas regions. The streaming service recently **celebrated** reaching 100 million paying subscribers worldwide and has established itself as the dominant player in Latin America where 29% of millennials have a premium account, compared to only 14% in Europe and 18% in North America. This success is largely due to Mexico where Spotify commands 65% of the millennial music streaming market.

The service has also **launched** a lightweight version of its original app in India which is suitable for entry budgets and older smartphones with limited capacity. **The platform will inevitably face competition here though**, not only from local providers like Gaana and JioSaavn, but also from Amazon Prime Music which is currently the choice of nearly half of online millennials in the market.

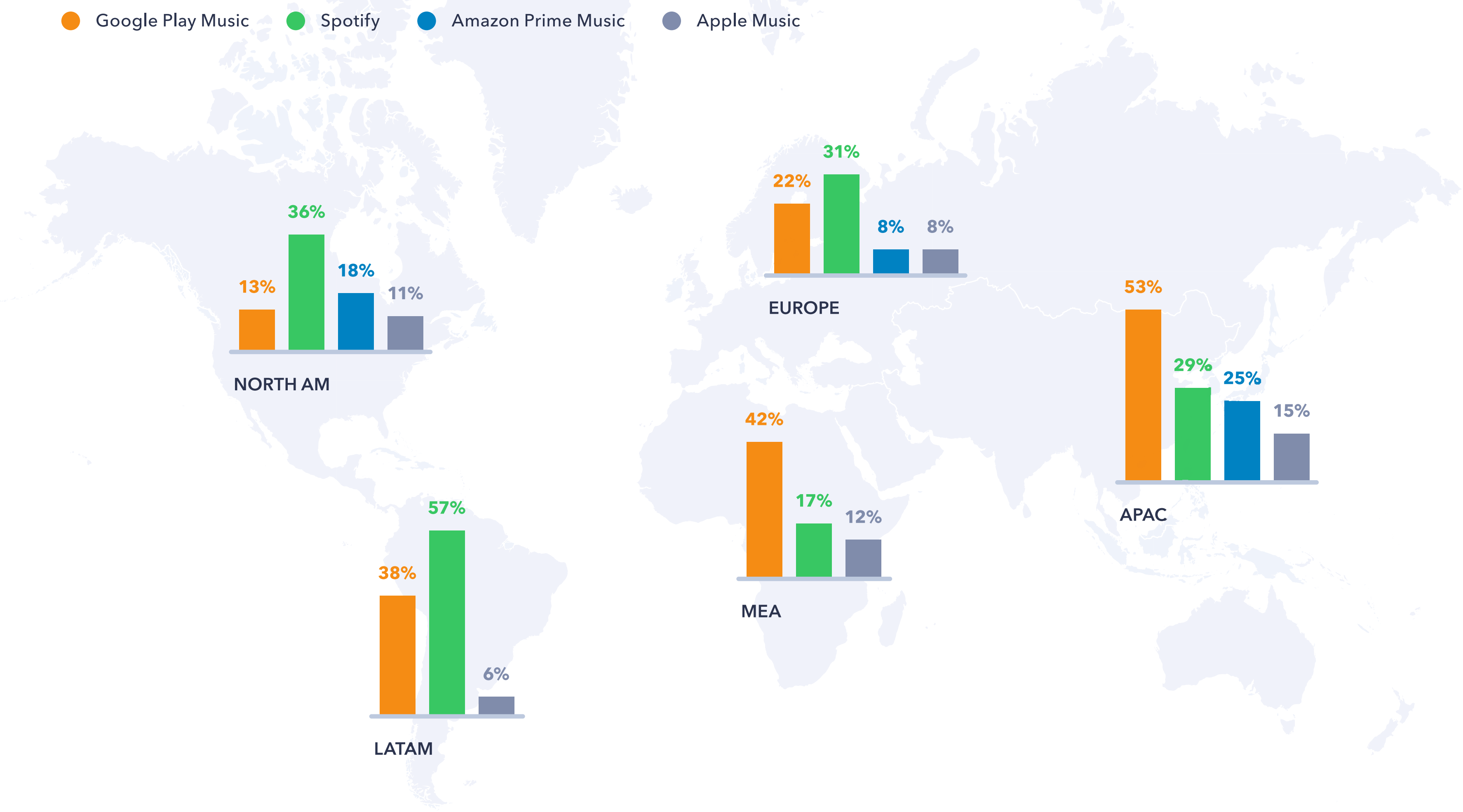
As with TV streaming, there are local providers which come to prominence in their respective countries. QQ Music (67%), Kugou (52%) and Kuwo (41%) are the top performers in China, while Anghami takes 38% of the market in Egypt. Pandora should not be discounted from the picture too, as it holds on to a 26% share in the U.S., while **SoundCloud is the market leader in MEA**, where 49% have used it in the past month.

Question: We'd like to ask you about how you engage with music. For each of these sets of statements, please select the point on the scale that best describes you - are you at one end of the scale or somewhere in the middle? **Source:** GlobalWebIndex Q1 2019 **Base:** 41,633 Internet Users Aged 23-36

Music Streaming

Music OTT Services

% of millennials outside China who have used the following services in the last month across the following regions

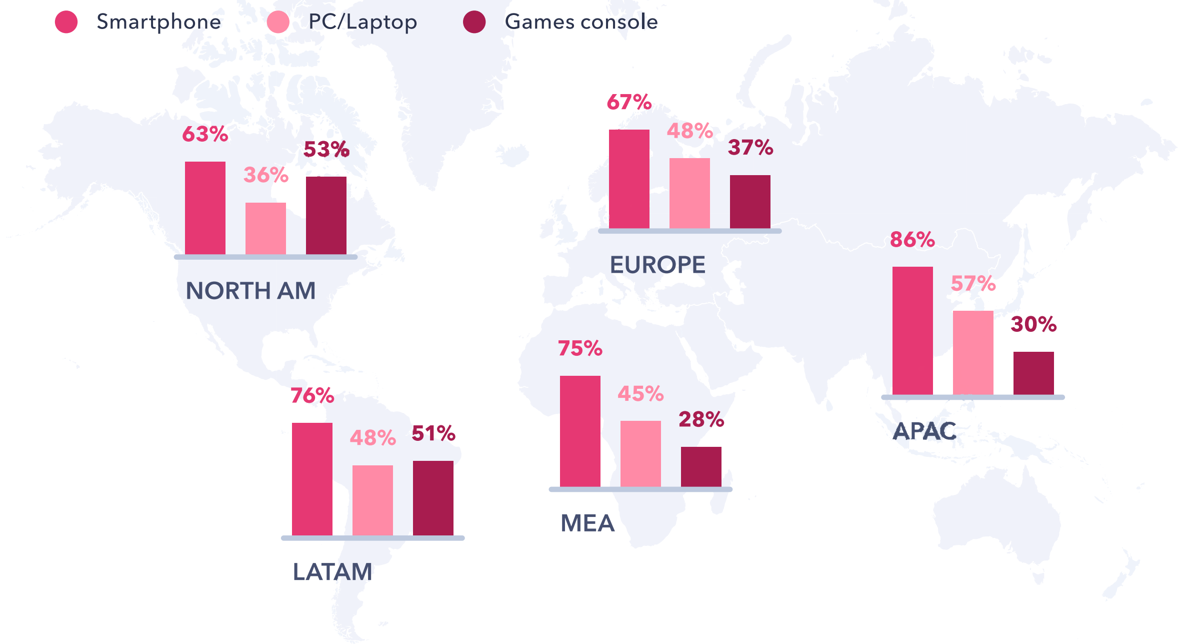


Question: In the last month, which of these services have you used to listen to / download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way. **Source:** GlobalWebIndex Q1 2019 **Base:** 34,660 Internet Users Outside China Aged 23-36

Gaming

Gaming Devices

% of millennials who use the following devices to play games



Gaming has emerged into the mainstream during millennials' lifetime, and this is demonstrated by the fact that **1 in 4 worldwide own a games console**, with North America (50%) leading the charts. Latin America and Europe follow with 38% and 35%, respectively.

Smartphone gaming is popular in all regions, but those characterized by fast-growth markets like Asia Pacific (86%) are top performers. The lack of a historic console-owning market here helps boost figures not only for mobile, but for PC gaming (57%) as well. **As with much of millennials' online activity, however, smartphone, desktop and console gaming are facets of multi-device behavior**, rather than being in direct competition with each other.

Question: Which of these devices do you use to play games? **Source:** GlobalWebIndex Q1 2019 **Base:** 41,633 Internet Users Aged 23-36

Gaming

Gaming Activities

% of millennials who have done the following recently

● All Millennials ● Younger Millennials (23-29) ● Older Millennials (30-36)

	All Millennials	Younger Millennials (23-29)	Older Millennials (30-36)
Played a game that you have streamed over the internet	44%	46%	42%
Watched a live gaming stream	36%	41%	32%
Watched an esports tournament	29%	32%	26%
Purchased a video game from an online store	26%	29%	23%
Connected a games console to the internet in order to play games	23%	23%	23%
Purchased a game add-on or DLC (Downloadable Content)	18%	19%	18%
Used a subscription service	18%	19%	18%
Broadcast a live stream of your gameplay	16%	16%	15%

44% of millennials have played a game streamed over the internet in the last month, though this is heavily inflated by the dominance of mobile games in Asia Pacific, particularly those integrated with multiplayer and social services like Tencent QQ and WeChat. In the rest of the world, the figure varies from 17% in LatAm to 36% in MEA.

Live game streaming and esports are where we find younger and older millennials differ the most, with the former showing a solid level of engagement with these activities. This is not surprising given that the driving force behind this now massive entertainment industry is typically younger, affluent consumers. **With almost a third of younger millennials engaging with esports today, it's clear that this exciting form of gaming entertainment is emerging from the margins into the mainstream.**

Nike seals the deal in esports

Non-gaming brand sponsorship deals, from food and drink to tech, are increasingly flooding in. A notable example is Nike's four-year apparel sponsorship deal with China's League of Legends Pro League (LPL).

This is the first time the brand has formally sponsored an esports team or competition – similar to NFL and NBA – and really helps to solidify esports as a real sport, and not just a "niche" area. Nike has sponsored traditional sports teams over the years, so their move toward sponsoring esports is a promising sign and a nod to many doubters. Developments like these, alongside many others, all promise to inject more money into esports leagues and spur even more growth.

Question: Thinking about gaming, which of these things have you done recently? **Source:** GlobalWebIndex Q1 2019 **Base:** 41,633 Internet Users Aged 23-36

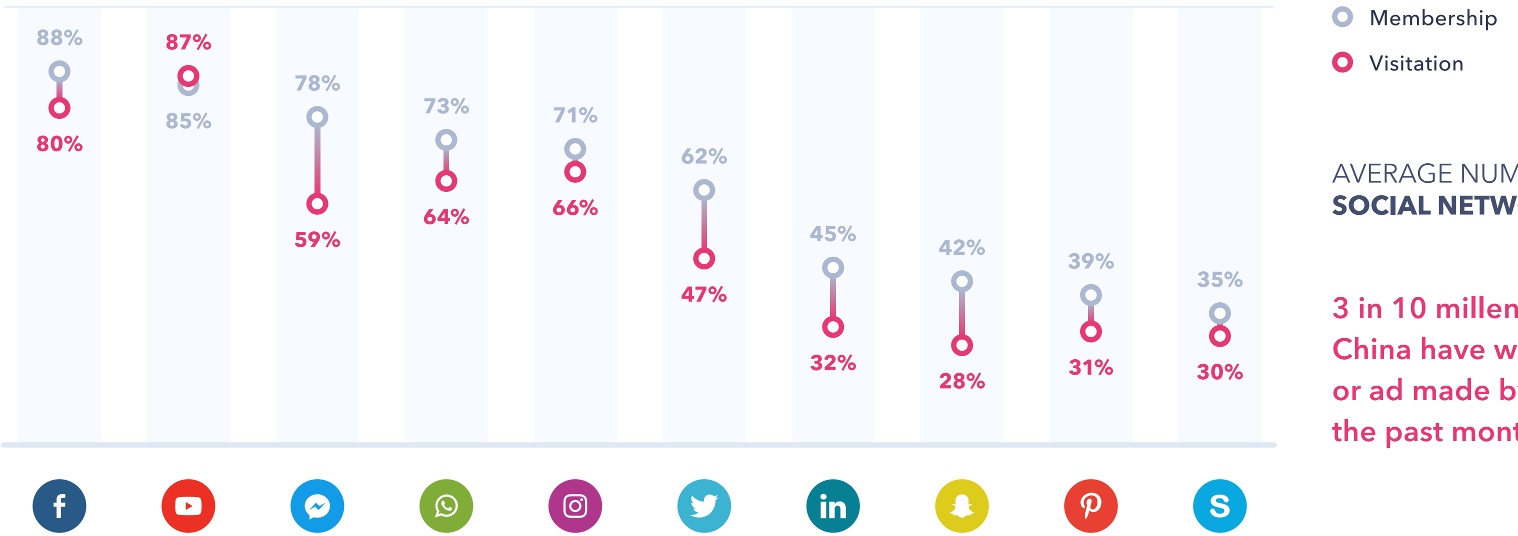
Millennials

Social Media Engagement

Social Media Engagement

Top Social Networks

% of millennials outside China who are members/visitors on the following social platforms



AVERAGE NUMBER OF **SOCIAL NETWORKS** **9.3**

3 in 10 millennials outside China have watched a video or ad made by a brand in the past month on YouTube.

Fittingly for the generation which grew up with social media, **millennials spend 2 hours and 44 minutes on social networks each day, or around 18 minutes longer than average**. During these almost three hours of their day, millennials are not staying on a single platform. In fact, the typical millennial internet user has an average of 9.3 social media accounts. **This is one account more than the global average and demonstrates how multi-networking is the norm for this generation. That doesn't mean that all of these accounts are being used on a regular basis, however. In fact, our data shows that younger consumers are more likely to be deleting their accounts compared to older users.**

And while not all platforms are visited with the same frequency, clearly **many social networkers are dipping in and out of the different platforms available**, something which mobiles have facilitated.

Outside of China, **Facebook membership is extensive, with 88% of this cohort holding an account and 45% using it more than once a day. The one platform that can truly challenge the reach of Facebook is YouTube**, which is also the only one drawing in more visitors/users (87%) than members (85%) - a result of visitors to the site not needing to sign up for an account.

Questions: On which of the following services do you have an account? // Which of the following sites/applications have you visited or used in the past month via your PC/Laptop, Mobile or Tablet? **Source:** GlobalWebIndex Q1 2019 **Base:** 34,660 Internet Users Outside China Aged 23-36

Social Media Engagement

Millennials are more likely than average to be engaging with Snapchat and Instagram, though the latter has a much stronger performance for both membership and visitation numbers. This highlights an approach to social which brands can tap into: **the appeal of visual search and content and the ability to showcase lifestyles and promote inspiration**. Given that millennials are 15% more likely than the average Instagrammer to have entered a competition by sharing a photo or using a hashtag related to a brand on the platform in the past month, it's clear that visual content on social media is a potentially fruitful touchpoint.

Within China, WeChat is the dominant force, with a 77% membership rate and 72% visitation rate among this audience.

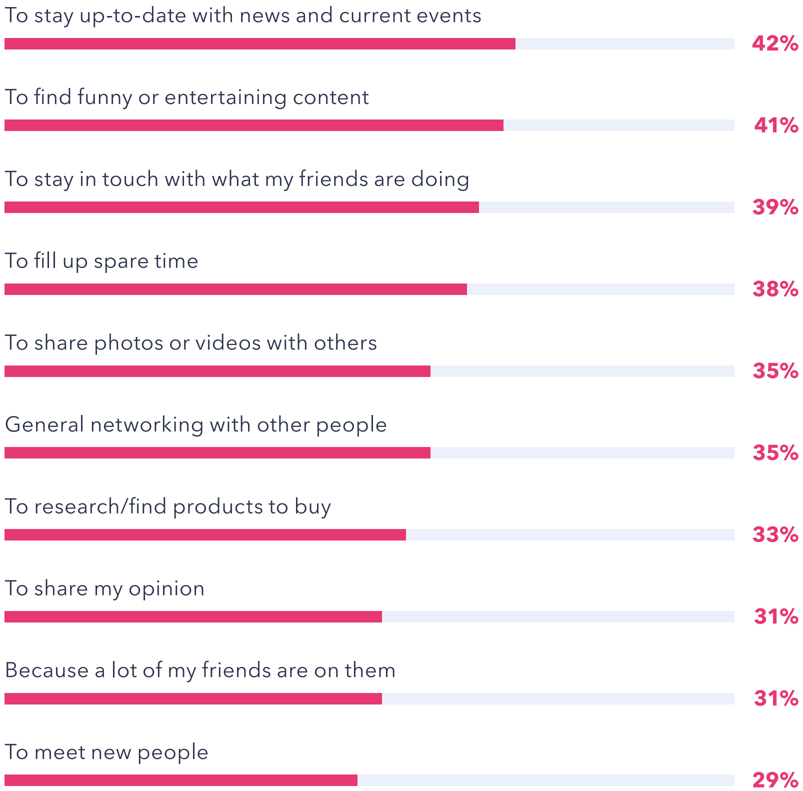
Following the global trend, **millennials' social behaviors are now less focused on sharing personal information and more purpose and entertainment-driven**. Looking at the reasons this cohort gives for using social media, keeping track of news and current affairs, as well as finding funny or entertaining content emerge at the very top.

The more "social" behaviors of sharing personal opinions and meeting new people, on the other hand, take 8th and 10th place, respectively. It's clear that for millennials, social media has become more about consumption than contribution. **This change in social media usage has had major implications on how this audience approaches shopping and entertainment in general.**

> For millennials, social media is more about consumption than contribution.

Top 10 Social Motivations

% of millennials who say the following are their main reasons for using social media



Top 3 Over-Indexes

27% IDX 1.15
To network for work

23% IDX 1.15
To share details of what I'm doing in my daily life

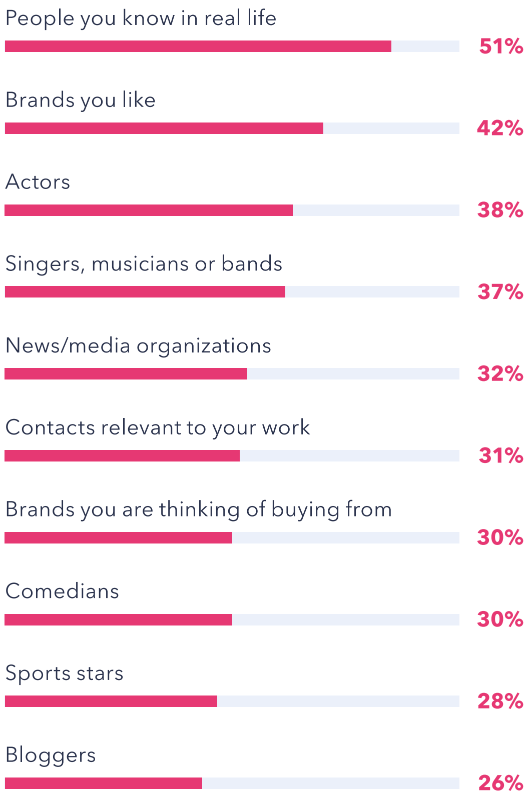
16% IDX 1.14
To promote/support charitable causes

Question: What are your main reasons for using social media? **Source:** GlobalWebIndex Q1 2019 **Base:** 41,633 Internet Users Aged 23-36

Social Media Engagement

Social Media Following

% of millennials who "follow" these people or organisations on social media



6 in 10 of them can be categorized as social shoppers, meaning they either use social media to research or find products to buy; they identify social networks as one of their main sources when looking for information about products; and that the option to use a "buy" button often motivates them to complete the purchase. This figure goes as high as 74% in Latin America and 71% in MEA. Brands need to be mindful of the fact that **social shopping**, at least for now, goes beyond clicking on "buy" buttons, though. Rather, social shopping encompasses the whole purchase journey from discovering the brand, through to researching its products to making the purchase.

Video is a calling card for social visits as well – 1 in 2 millennials outside China have engaged with video in some way in the last month on Facebook, Twitter, Instagram, or Snapchat. Video on social media portrays brands in new ways, while engaging viewers more profoundly. Most importantly, using social video as a marketing strategy is less intrusive than the use of banner ads and allows brands more opportunities in conveying their message and earning consumers' trust.

News consumption is another area that is becoming more and more prominent with millennials on social media. **57% of them are news networkers** – those who use social media to stay up-to-date with current events and follow journalists or news organizations. By comparison, 87% say they have visited a news website in the past month, going down to 57% for a business news website.

Looking at the accounts millennials follow on social media, **it's clear that they like to see branded content on their newsfeeds**. A higher share of this cohort say they follow brands they like than all 15 other options we track, except for people they know in real life, and **3 in 10 follow brands they are thinking of buying something from**. This is most pronounced in Latin America where 57% of millennials follow their favorite brands, and it's the least pronounced in Europe (38%).

Question: Who do you follow on social media?
Source: GlobalWebIndex Q1 2019 **Base:** 41,633 Internet Users Aged 23-36

Millennials

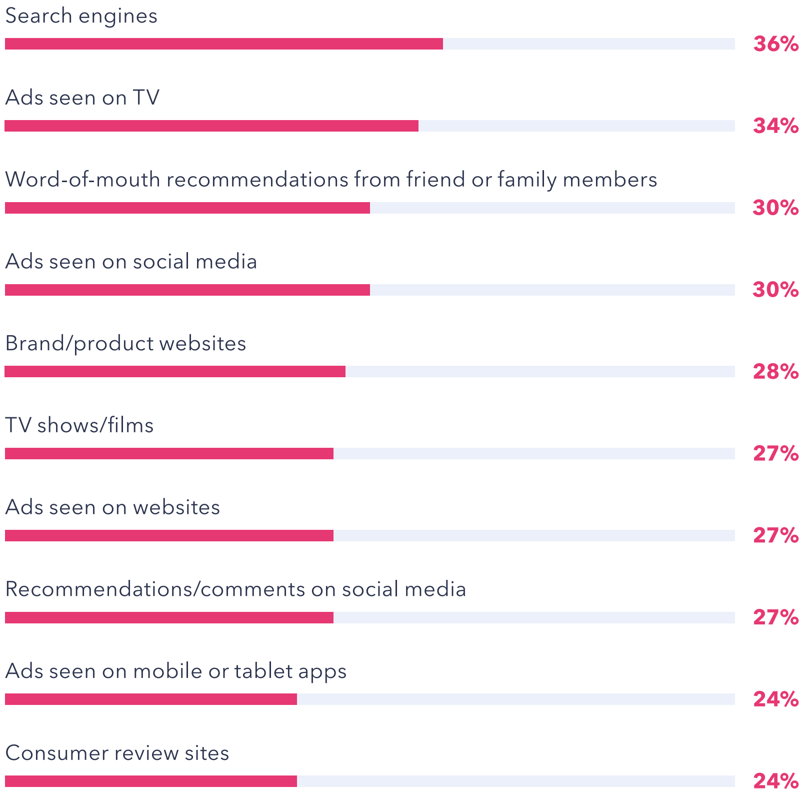
The Purchase Journey

Audience Report 2019

Brand Discovery

Top 10 Brand Discovery Channels

% of millennials who say that they find brands via the following channels



Top 3 Over-Indexes

IDX 1.16
Endorsements by celebrities or well-known individuals

IDX 1.15
Posts or reviews from expert bloggers

IDX 1.15
Updates on brands' social media pages

Millennials may be enthusiastic about engaging with new types of media in general, but **more mainstream marketing sources perform the strongest for brand discovery**. The top channels here are search engines (36%) and TV ads (34%), though this varies strongly by region. Social media ads appear as the top source of brand discovery in Latin America (41%) and MEA (35%), while word-of-mouth comes at the top in North America (36%).

For an audience that is commonly regarded as **anti-advertising** and is actively taking steps to protect its personal privacy, **millennials do not differ much from the average internet user when it comes to finding out about brands via advertising**. Despite 56% of them saying they've used an ad-blocker in the last month, a significant number (27%) still discover brands through ads on websites.

Millennials may be digitally fluent on the whole, but for them, offline sharing is still as relevant as online in discovering brands

The two over-indexes here – celebrity endorsements and expert blogger posts – **point towards influencers as an effective way to reach millennials**. Influencer marketing would also allow brands to sidestep ad-blocking, but the threat of a backlash to over-saturation needs to be considered, just as the proliferation of online ads has been met by ad-blocking tools.

Although influencer marketing can be a great tactic when used correctly, **it's not the perfect solution for every business model** and needs to be approached with caution. It is still not sufficiently regulated and in some reported cases has led to fraudulent behavior, which might be detrimental to millennials' trust in a brand if it happens to be associated with such.

Question: How do you typically find out about new brands and products? **Source:** GlobalWebIndex Q1 2019 **Base:** 52,506 Internet Users Aged 23-36

Product Research

As with discovery, **search engines are the first port of call for further research of a brand**, with 51% of millennials using that channel. But social networks (46%) are closely following, which underlines **how they have become the adopted channels through which many of this cohort access online content**, and by extension, a lot of branded content which can clearly impact purchasing decisions.

Social networks are even more prominent than search engines in MEA and Latin America where **more than 6 in 10 millennials look for more information about products and brands**. It is in these regions that social platforms provide important brand-consumer touchpoints as well. Millennials in MEA and Latin America are 20% and 29% more likely to have clicked on a sponsored post on a social network in the past month.

Consumer reviews are also a go-to product research channel for this audience, especially in North America where they are still ahead of social networks.

The over-indexes here are more specific instances of high-impact social touchpoints, with vlogs, micro-blogs and messaging services all finding favor. But it should be noted that none of them command a sizable proportion of the overall audience, with micro-blogs and messaging services used the most, but achieving only a 16% audience share.

Top 10 Product Research Channels

% of millennials who say that they research products/services via the following routes

Top 3 Over-Indexes

IDX 1.19

Micro-blogs (e.g. Twitter)

IDX 1.17

Messaging/live chat services

IDX 1.17

Vlogs (blogs recorded in video form)

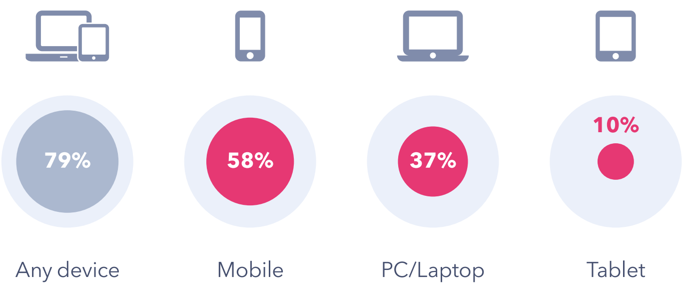
For millennials in LatAm and MEA, social media trumps search for product research.

Question: Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services? **Source:** GlobalWebIndex Q1 2019 **Base:** 52,506 Internet Users Aged 23-36

Ecommerce & Purchase Drivers

Online shopping by device

% of millennials who have purchased a product online in the past month on the following devices



Top 10 Purchase Drivers

% of millennials who say the following would motivate them to make a purchase

Free delivery	53%
Coupons and discounts	42%
Reviews from other customers	36%
Easy returns policy	33%
Quick/easy online checkout process	30%
Next-day delivery	30%
Loyalty points	28%
Lots of "likes" or good comments on social media	25%
Ability to pay with cash on delivery	21%
Knowing the product/company is environmentally friendly	20%

Online shopping is a mainstream activity for this audience, as 8 in 10 millennials have purchased a product online on any device in the last month. More of them are doing so via their mobiles (58%) than computers (37%), and the gap is increasingly widening between the two devices.

This applies to all regions, with the exception of Europe and North America. In the former, mobiles and desktops have reached a parity at 46%, so it's likely that we'll soon see m-commerce surpassing PC shopping here. The latter is the only region where millennials are still slightly more likely to use desktops for online shopping than mobiles.

We see the largest gap of 31 percentage points in APAC, where millennials are not only mobile-first internet users, but also benefit from the one-stop-shop offering of services like WeChat, where vendors can easily integrate into the social platform.

Turning our attention to what actually motivates this audience to complete a purchase, **the most popular driver overall, across *all* markets, is free delivery (53%)**. Easy returns policy and quick and easy online checkout process also perform well, which is another indicator of millennials' desire for convenience, flexibility, and instant access.

Fittingly for such a socially-engaged group, **their highest over-index is for being motivated by the chance to purchase within the social media interface**. They are 19% ahead of average for a buy button on social media, but it is a far smaller proportion of millennials (14%) who choose this than are actively researching on social networks (44%).

For now, at least, whether due to privacy concerns or a lack of a seamless transition between pages and vendors, **millennials choose to navigate away from social media to dedicated ecommerce spaces at the point of purchase**. However, the social purchase loop is likely to close soon, as platforms are integrating commercial features within their ecosystems, like Instagram's latest fully-fledged shopping **check-out** function.

Questions: In the past month, which of the following things have you done on the internet via any device? Purchased a product online // When shopping online, which of these features would most increase your likelihood of buying a product?
Source: GlobalWebIndex Q1 2019 **Base:** 41,633 Internet Users Aged 23-36

Turning Millennials into Brand Advocates

Brand Advocacy Motivations

% of millennials who would advocate a brand for the following reasons

47% High-quality products

31% When something is relevant to my interests

19% Access to exclusive content or services

40% Rewards (e.g. discounts, free gifts, etc)

22% The feeling of taking part/being involved

19% When I have a one-on-one relationship with a brand

34% Love for the brand

21% When something is relevant to my friends' interests

16% When something enhances my online reputation/status

31% When I've received great customer service

20% Having insider knowledge about the brand/products

Top 3 Over-Indexes

IDX 1.16 When something enhances my online reputation/status

IDX 1.13 Access to exclusive content or services

IDX 1.08 When I have a one-on-one relationship with a brand

Much has been written on millennials being an elusive audience to reach. **One way to create awareness is to spread along a network of reviewers. As 55% of all millennials have left an online review in the past month**, brands can benefit from the awareness provided by positive reviews left by other representatives of this group.

For them to do so, **the best prospect is providing a high-quality product**, as almost half of this audience would advocate a brand for that reason, while 4 in 10 would do so for financial incentives like discounts and free gifts.

Image dictates the strongest over-indexes, with millennials being 14% more likely to promote a brand online if it enhances their online reputation. They also stand out with their desire for a tailored relationship with brands, as well as their emphasis on exclusivity. In choosing exclusive content as a reason to advocate brands, millennials once again show how their love for entertainment dictates much of their online behavior.

Question: What would most motivate you to promote your favorite brand online?
Source: GlobalWebIndex Q1 2019 **Base:** 41,633 Internet Users Aged 23-36

Notes on Methodology

All figures in this report are drawn from **GlobalWebIndex's online research among internet users aged 16-64**. Please note that we only interview respondents aged 16-64 and our figures are representative of the **online** populations of each market, not its total population.

OUR RESEARCH

Each year, GlobalWebIndex interviews over 550,000 internet users aged 16-64 across 45 markets. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers.** Each respondent who takes a GlobalWebIndex survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

OUR QUOTAS

To ensure that **our research is reflective of the online population in each market**, we set appropriate **quotas on age, gender, and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the 'weight' of each respondent; that is, approximately how many people (of the same gender, age, and educational attainment) are represented by their responses.

MOBILE SURVEY RESPONDENTS

From Q1 2017 on, GlobalWebIndex has offered our Core survey on mobile. This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

Please note that the sample sizes presented in the charts throughout this report may differ as some will include both mobile and PC/laptop/tablet respondents and others will include **only** respondents who completed GWI's Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, please download this **document**.

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q1 2019 wave of research across 45 countries, with a global sample of 139,397 respondents.

	MILLENNIALS	TOTAL
Argentina	**666**	1,573
Australia	**1,370**	4,038
Austria	**417**	1,289
Belgium	**376**	1,274
Brazil	**1,120**	2,366
Canada	**637**	2,274
China	**7,547**	15,350
Colombia	**600**	1,314
Denmark	**315**	1,264
Egypt	**1,003**	1,770
France	**1,359**	5,035
Germany	**1,332**	5,055
Ghana	**487**	990
Hong Kong	**712**	1,829
India	**3,730**	7,587
Indonesia	**967**	1,939
Ireland	**440**	1,260
Italy	**1,599**	5,185
Japan	**417**	1,804
Kenya	**565**	1,024
Malaysia	**788**	1,536
Mexico	**1,297**	2,633
Morocco	**457**	1,038

	MILLENNIALS	TOTAL
Netherlands	**320**	1,324
New Zealand	**418**	1,280
Nigeria	**548**	1,099
Philippines	**822**	1,664
Poland	**792**	1,850
Portugal	**481**	1,292
Romania	**445**	1,318
Russia	**733**	2,157
Saudi Arabia	**779**	1,413
Singapore	**1,126**	2,718
South Africa	**677**	1,508
South Korea	**380**	1,287
Spain	**1,678**	5,070
Sweden	**383**	1,302
Switzerland	**421**	1,289
Taiwan	**668**	1,790
Thailand	**731**	1,602
Turkey	**742**	1,513
UAE	**962**	1,727
UK	**3,050**	10,102
USA	**7,382**	25,092
Vietnam	**767**	1,573

Notes on Methodology: Internet Penetration Rates

ACROSS GLOBALWEBINDEX'S MARKETS

GlobalWebIndex's research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the **lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated.** This is the case throughout much of LatAm, MEA and Asia Pacific.

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2019. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

GLOBALWEBINDEX VERSUS ITU FIGURES

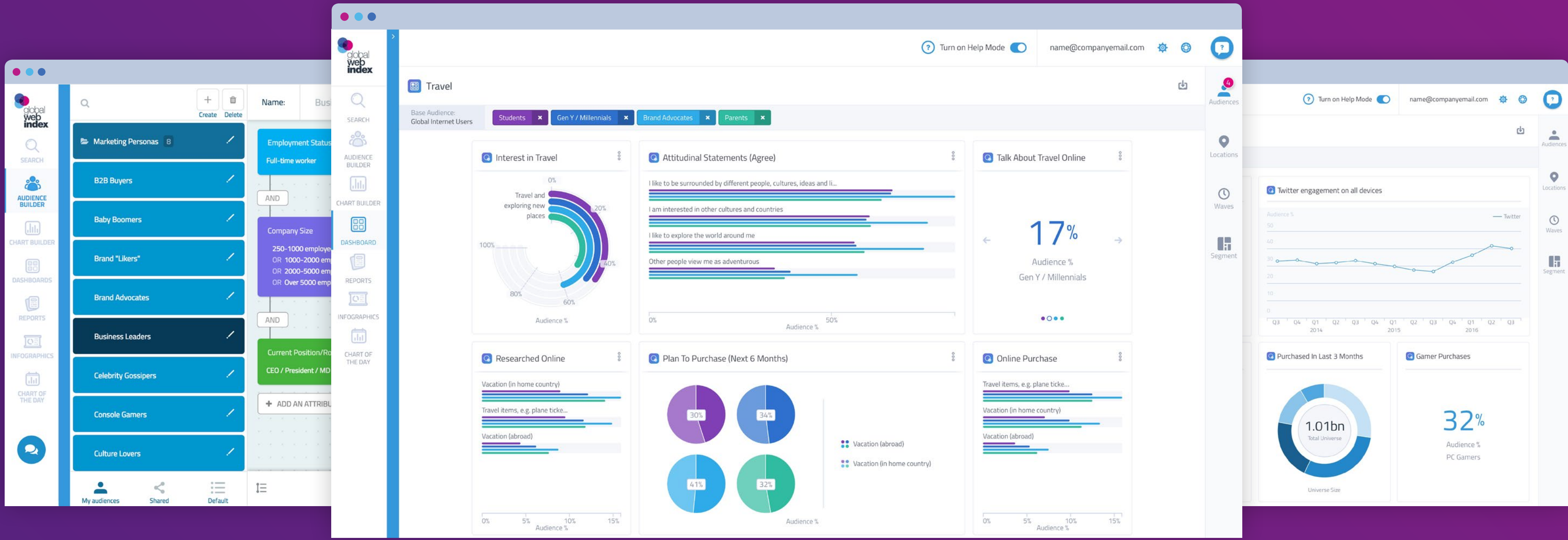
As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

Internet Penetration Rates

GlobalWebIndex's Forecasts for 2019 based on 2017 ITU data

Argentina	78%	Indonesia	39%	Russia	80%
Australia	88%	Ireland	87%	Saudi Arabia	83%
Austria	88%	Italy	62%	Singapore	85%
Belgium	89%	Japan	92%	South Africa	62%
Brazil	71%	Kenya	43%	South Korea	95%
Canada	94%	Malaysia	83%	Spain	87%
China	59%	Mexico	69%	Sweden	96%
Colombia	66%	Morocco	69%	Switzerland	96%
Denmark	97%	Netherlands	93%	Taiwan	83%
Egypt	54%	New Zealand	93%	Thailand	58%
France	85%	Nigeria	36%	Turkey	71%
Germany	88%	Philippines	64%	UAE	95%
Ghana	48%	Poland	79%	UK	96%
Hong Kong	91%	Portugal	78%	USA	80%
India	42%	Romania	72%	Vietnam	55%



Get more from your data.

Run your own custom studies using our panel of 22 million consumers, and get instant access to insight tailored to your business needs.

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