globalwebindex

Millennials

Examining the attitudes and digital behaviors of internet users aged 21-34

AUDIENCE REPORT **2018**

www.globalwebindex.net

Contents

Introduction

This report delves into the digital lives of Millennials by focusing on:

Attitudes and lifestyles
What are the defining attitudes and characteristics of this group and what are their major interests?

Device usage
What are the most important devices to this group, how are they engaging with new 'smart' devices, and which devices demand most of their time?

Entertainment habits
Are Millennials shifting their entertainment consumption wholly online or does traditional media still play a role in their lives? How widespread is second-screening?

Social media activities
What are Millennials' favorite social media platforms and who do they prefer to "follow" on these services?

Commerce and brand engagement
How do this audience discover and interact with brands while online? What can brands do to appeal to a Millennial?

METHODOLOGY

All figures in this report are drawn from GlobalWebIndex's online research among internet users aged 16-64. We only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population. Note that in many markets in LatAm, MEA and Asia Pacific, low internet penetration rates can mean online populations are more young, urban, affluent and educated than the total population.

Each year, GWI interviews over 350,000 internet users aged 16-64 via an online questionnaire for our Core dataset. A proportion of respondents complete a shorter version of this survey via mobile, hence the sample sizes presented in the charts throughout this report may differ as some will include all respondents and others will include only respondents who completed GlobalWebIndex's Core survey via PC/laptop/tablet.

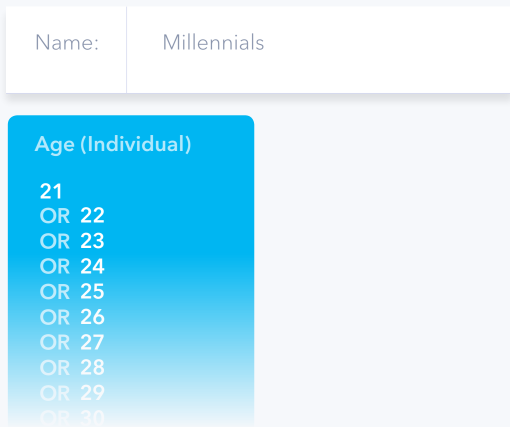
For more detailed information on GlobalWebIndex and the data used in this report, please consult our Notes on Methodology at the end of this report.

AUDIENCE

Respondents in our Core survey are asked 'How old are you?'. In this report, Millennials are defined as internet users who say they are aged between 21 and 34.

To re-create this audience on our platform, access our Audience Builder:

CLICK HERE



Key Insights

Millennials are mobile-first.

Practically all online Millennials own a smartphone, they are most likely to identify their mobile as their more important internet device, and they are spending almost as long online via mobile as via all other devices combined. Across most social, entertainment and online commerce activities, mobiles are the preferred devices for this group.

Cord-cutting is rare and broadcast TV is still important to Millennials.

Two thirds of Millennials are watching TV/film subscription series but broadcast TV still retains an important role for this group. 8 in 10 are watching live broadcast TV and this audience still averages more daily time on linear TV than online/streaming.

Social is key to the purchase journey but not yet the purchase transaction.

Social media is the second-most important product research channel for Millennials but they are still turning to traditional commerce sites to complete purchases. Brands should be careful to take a rounded approach to social commerce, recognizing that social has a greater role in brand research and discovery than it currently does for completing purchases.

However, a multi-device strategy is needed for full engagement.

Millennials get online via 2.8 devices, on average, and are still averaging nearly 4 hours online via PCs/laptops/tablets each day. TV sets are still the primary device for TV engagement.

Entertainment drives social engagement, across a range of platforms and increasingly via video.

Millennials are comfortable multi-networking, over half are watching video on the major social platforms and they are more likely to identify social as a route to entertainment than a place to share personal news.

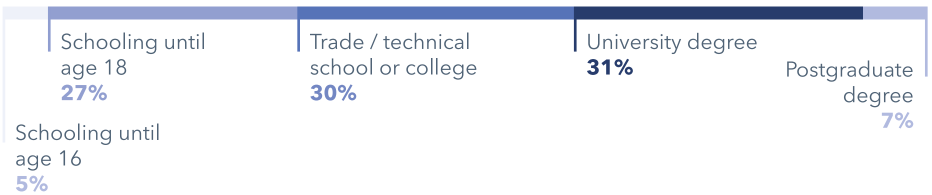
Ad-blocking is mainstream but branded content can engage.

Ad-frustration is driving many Millennials to deploy ad-blockers, though this does not mean zero ad-exposure online (due to whitelisting and selective blocking). However, in this context it's important to note that when discovering, researching, and advocating brands, entertaining content is more impactful than average for this group.

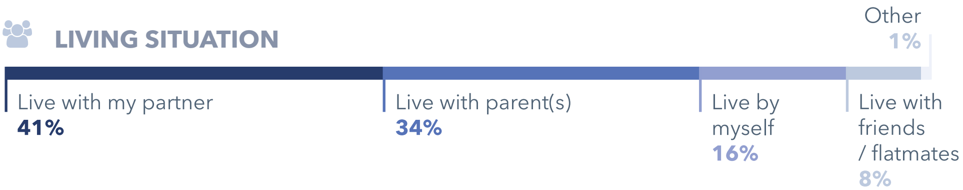
1. Demographics & Lifestyle

URBAN CONTEXT

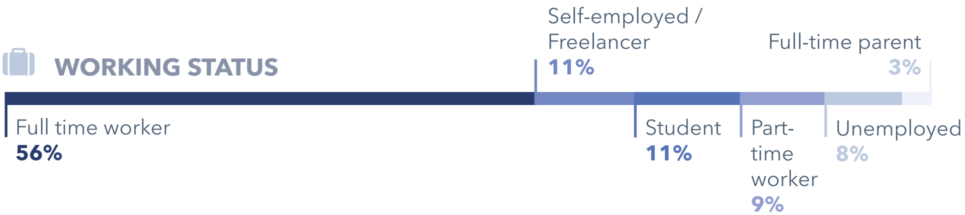
EDUCATION ACHIEVED



LIVING SITUATION



WORKING STATUS



1a. LIFESTYLE

% of Internet Users aged 21-34 who say they regularly do the following

Exercise	**62%**	1.05
Eat fast food	**34%**	1.12
Vacation in home country	**34%**	1.18
Eat out at a restaurant	**15%**	1.21

To find out more about how these segments are defined, **click here**

TOP 3 OVER-INDEXES

Gaming	1.17
Reality TV shows	1.14
Gadgets	1.14

1b. PERSONAL INTERESTS

% of Internet Users aged 21-34 who say they are strongly interested in the following

Film / movies	**54%**
Music	**53%**
Food / restaurants / cooking	**45%**
Books / reading	**39%**
Gaming	**39%**
Health and fitness	**38%**
Travel and exploring new places	**37%**
Science and technology	**36%**
Television	**36%**
News / current affairs	**34%**

A Millennial internet user is most likely to be living in an urban location, working full-time, and be educated to university level

Entertainment (music and movies) are their top interests

62% are regular exercisers, and over a third say health and fitness is a strong personal interest but they still value eating out – they're 23% more likely to eat out regularly at restaurants (15% do)

Millennials are not uniform: 58% are aged 21-27, of which 19% are married, 20% are parents, and 44% live with their parents. 42% are aged 28-34, of which 59% are married, almost 6 in 10 are parents, and 61% live with their partner.

1a. Source: GlobalWebIndex Q3 2017
Base: 29, 671 Internet Users aged 21-34

1b. Question: Here is a list of topics that may interest you. Can you please indicate which of these you are strongly interested in? **Source:** GlobalWebIndex Q3 2017
Base: 29,671 Internet Users aged 21-34

2. Device Ownership & Engagement

Smartphones are central to Millennials' digital lives. Not only do they have a commanding lead over PC and laptops for ownership, **68% of this group choose their mobile as their most important device,** compared to just 16% for laptop and 14% for desktop PC.

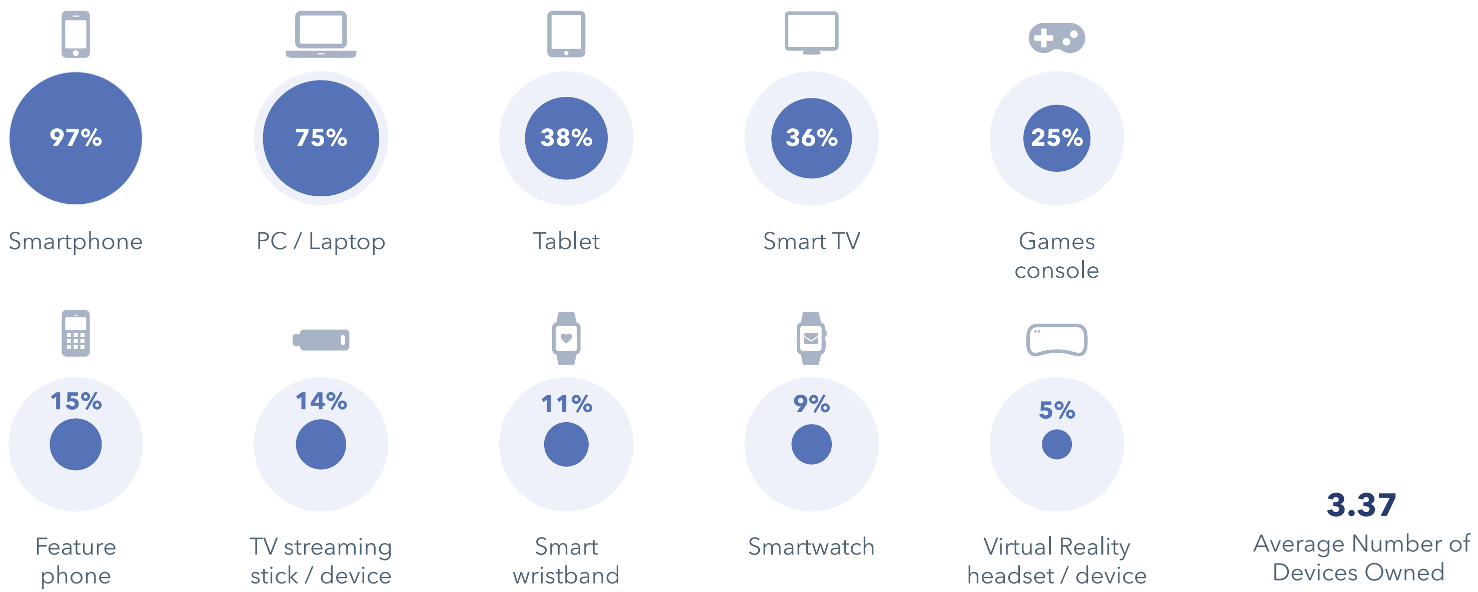
Broadly speaking, Millennials in emerging markets are the most mobile-centric. Europe and North America see relatively more importance placed on computers, as internet users there typically first got online through those devices, but they still value their mobile most. Nevertheless, in almost all markets Millennials are multi-device users, and though mobiles are preferred, they are not used in isolation. In fact, **Millennials get online with an average of 2.80 devices each,** illustrating the seamlessness with which they expect to access sites and services on multiple devices during their day.

Smartphones are central to Millennials' digital lives

2a. Question: Which of the following devices do you own? **Source:** GlobalWebIndex Q3 2017
Base: 36,986 Internet Users aged 21-34

2a. DEVICE OWNERSHIP

% of Internet Users aged 21-34 who personally own the following devices



RESPONDENTS SEE THE FOLLOWING DEFINITIONS & ILLUSTRATIVE EXAMPLES

e-Reader: a digital reading device, e.g. Amazon Kindle, Kobo, Nook etc

Smart TV: a television that can connect to the internet

Smart wristband: a digital wristband which typically tracks your health and fitness levels. Popular examples include Nike Fuelband, Jawbone Up and Fitbit

Smartphone: an internet and app-enabled phone such as the iPhone, a BlackBerry or Android phones like the Galaxy S series

Smartwatch: a watch which allows you to connect to the internet and use apps. Popular smartwatches include Pebble, Sony Smartwatch, Samsung Galaxy Gear and the Apple Watch

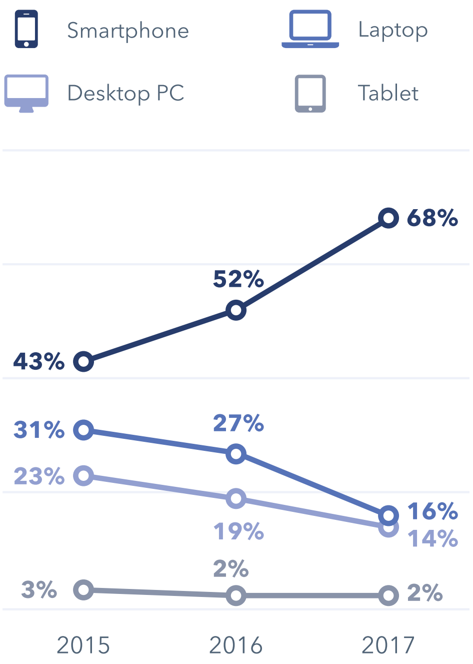
Tablet device: e.g. an Apple iPad, Samsung Galaxy Tab, Microsoft Surface, Google Nexus tablet

TV streaming stick/device: a digital media device which streams web content to your TV set, e.g. Apple TV, Amazon Fire TV Stick, Google Chromecast, Roku Streaming Player

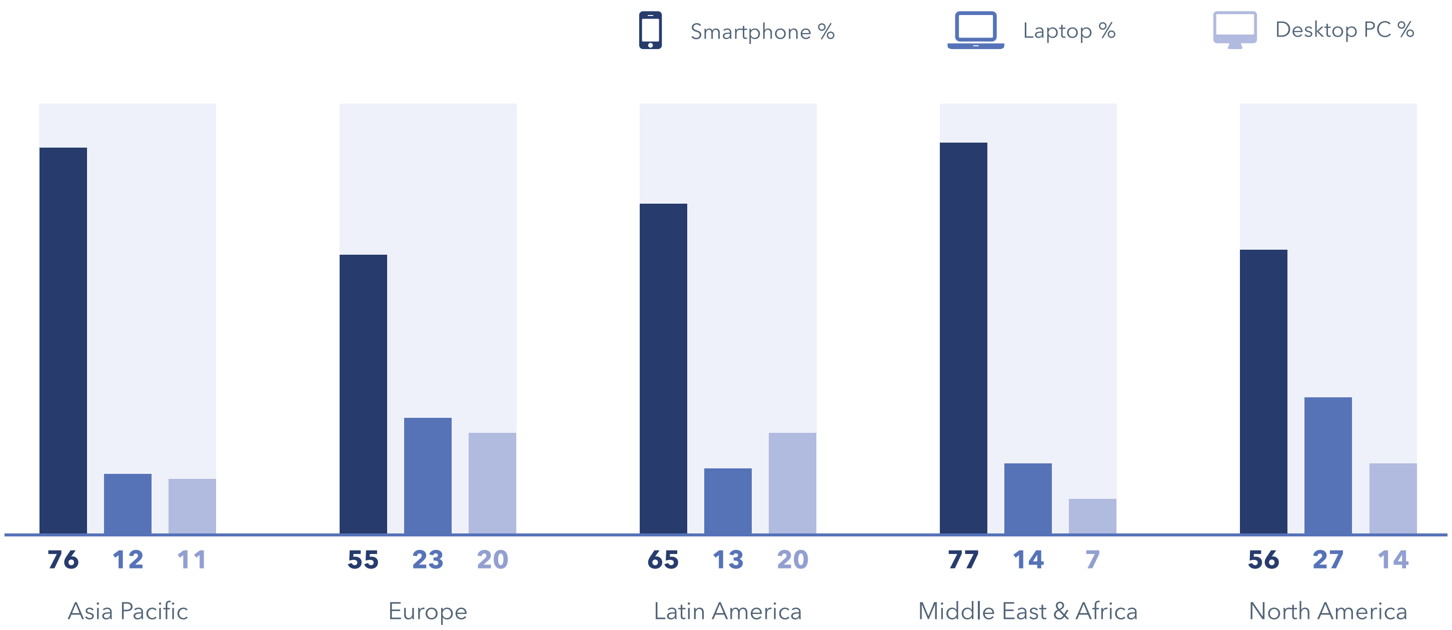
Virtual reality headset/device: a device that immerses users into simulated environments. Popular examples include PlayStation VR, Samsung Gear VR, Google Cardboard and Deepon VR

2b. DEVICE IMPORTANCE

% of Internet Users aged 21-34 who say that the following device is the most important for accessing the internet



2c. BY REGION



2b. | **2c. Question:** Which would you say is the most important device you use to access the internet, whether at home or elsewhere? **Source:** GlobalWebIndex 2015-2017 (average of all waves conducted in a year) | GlobalWebIndex Q3 2017 **Base:** 29,671 Internet Users aged 21-34

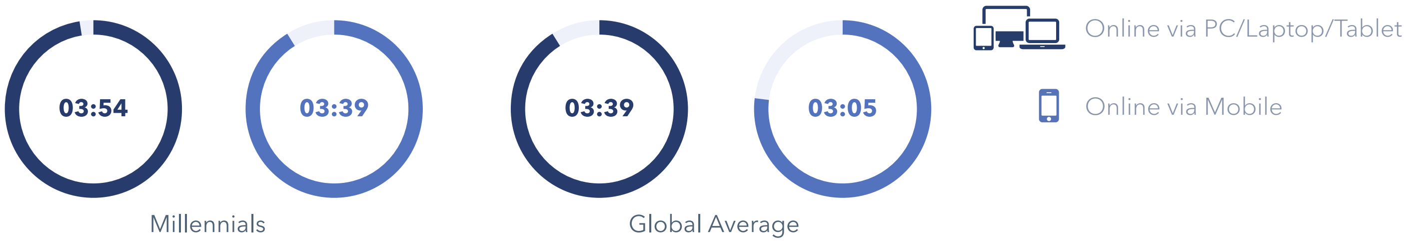
2d. TOP MOBILE BRANDS

% of Internet Users aged 21-34 who own/would consider purchasing the following mobile brands

Region	Brand	Own	Would consider purchasing
ASIA PACIFIC	iPhone	31%	45%
	Samsung	27%	34%
	Huawei	16%	23%
EUROPE	Samsung	36%	51%
	iPhone	25%	37%
	Huawei	9%	14%
LATIN AMERICA	Samsung	39%	60%
	iPhone	18%	40%
	Motorola	17%	30%
MIDDLE EAST & AFRICA	Samsung	34%	52%
	iPhone	20%	54%
	Huawei	10%	25%
NORTH AMERICA	iPhone	49%	55%
	Samsung	32%	47%
	LG	11%	13%

2e. AVERAGE TIME SPENT PER DAY

Average number of hours and minutes spent…



Samsung (36%) holds the advantage for current brand ownership, but the iPhone (51%) is the favored choice for Millennials to upgrade to, which 31% say they will do within the next 6 months. That 19% would consider purchasing a phone made by challenger brand Huawei, and that 13% would buy a Xiaomi model, shows that this is not just a two-horse race. In fact, Huawei posts some encouraging numbers outside of its native Asian markets; 14% of European Millennials would consider purchasing one, as would 25% in Middle East/Africa.

38% of Millennials may own a tablet but that **only 2% of Millennials say that their tablet is their most important online device** underscores how they have failed to become essential devices for this group. With mobile phones developing bigger screen sizes and becoming more powerful, tablets lack relevance. That said, **Millennials who are parents are ahead here,** suggesting they can have an audience among this generation, if targeted as household devices.

Millennials are increasingly looking at challenger mobile manufacturers like Huawei and Xiaomi

While Millennials may consider their smartphone to be their most important device, on average **they spend 15 minutes longer online via PCs and laptops** during their day. Many online activities are migrating to smartphones, as we will explore later, but desktops remain important. Mobile usage is not taking away time spent on computers; rather, it is adding another screen used for a different purpose, and one which can be used on-the-go. As Millennials are multi-device users, any marketing strategy needs to be flexible to match Millennials' willingness to switch between them.

Millennials say mobiles are their most important device

2d. Question: 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 Q3 2017 **Base:** 36,986 Internet Users aged 21-34

2e. Question: Roughly how many hours do you spend online on a PC/laptop/tablet/mobile during a typical day? **Source:** GlobalWebIndex Q3 2017 **Base:** 36,986 Internet Users aged 21-34

3. Overview

The popularity of smartphones ensures Millennials continue to consume entertainment while on the move, and all entertainment-related activities (barring TV) are now more likely to be carried out on smartphones than desktops.

Social media is a popular form of entertainment in its own right, taking up an average of two and a half hours of a Millennial's day and rivaling TV for time spent. Meanwhile, **online press is ahead of print press,** largely thanks to Millennials' mobile-first behavior; 73% visited a news website or app on their mobile last month. While more news is read online than off, **online TV is yet to surpass its linear equivalent,** trailing by 25 minutes.

Music streaming and console gaming are a part of the entertainment picture too, taking up over an hour each of a Millennial's day. **The popularity of ad-supported models and account sharing is apparent** as 72% of this group have used a music-sharing service in the past month on any device, but only 21% report paying for one in that time. Likewise, 62% say they use a TV/film subscription service at least once a month, but just 23% paid for one.

Millennials value consuming entertainment on the move - they are accessing more content on mobiles than PCs

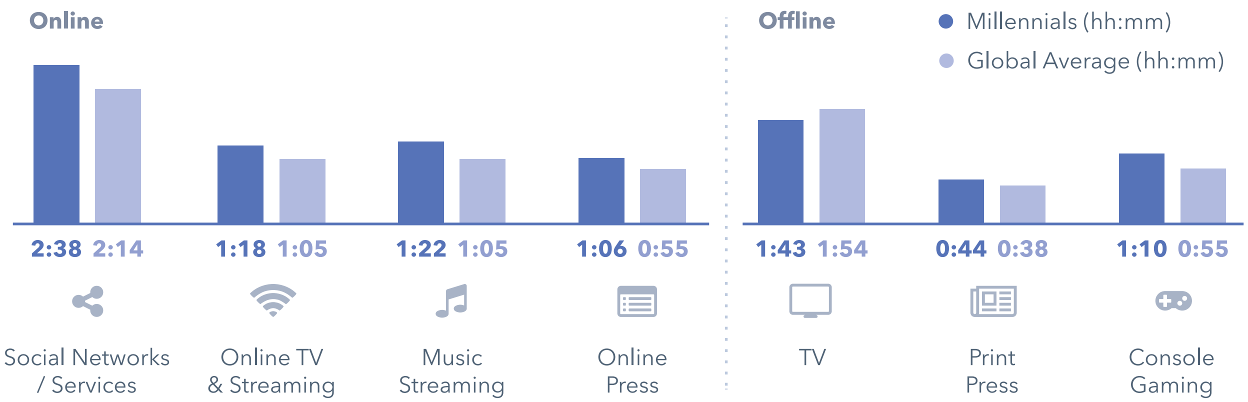
3a. Question: Roughly how many hours are you actively engaged/connected with the below content/media during a typical day? **Source:** GlobalWebIndex Q3 2017 **Base:** 29,671 Internet Users aged 21-34

3b. Question: In the past month, which of the following things have you done on the internet via PC/laptop/mobile? **Source:** GlobalWebIndex Q3 2017 **Base:** 29,671 Internet Users aged 21-34

3c. Question: Which of the following types of online content have you paid for in the past month? **Source:** GlobalWebIndex Q3 2017 **Base:** 36,986 Internet Users aged 21-34

3a. TIME SPENT ON ENTERTAINMENT

Hours and minutes spent on the following each day



3b. ONLINE ENTERTAINMENT

% of Internet Users aged 21-34 who have done the following online in the last month on the following devices

Watched a video clip or visited a video-sharing site	**83%**	**68%**
Used a music-streaming service	**47%**	**33%**
Watched a vlog	**35%**	**29%**
Watched sports coverage or highlights online	**34%**	**33%**
Listened to an online radio station / service	**32%**	**23%**
Listened to or watched a podcast	**27%**	**19%**

3c. PAID-FOR CONTENT

% of Internet Users aged 21-34 who have paid for the following content in the last month

Music download	**26%**
Movie or TV streaming service	**23%**
Music streaming service	**21%**
Mobile game	**19%**
Mobile app	**19%**
Movie or TV download	**18%**

4. TV

While online TV continues to rise in precedence, there's no doubting the power of live TV to reach this generation. **Yet streaming services have impacted *how* Millennials consume content,** as they are more likely than average to "binge watch" (watching back-to-back episodes from the same TV show in one go).

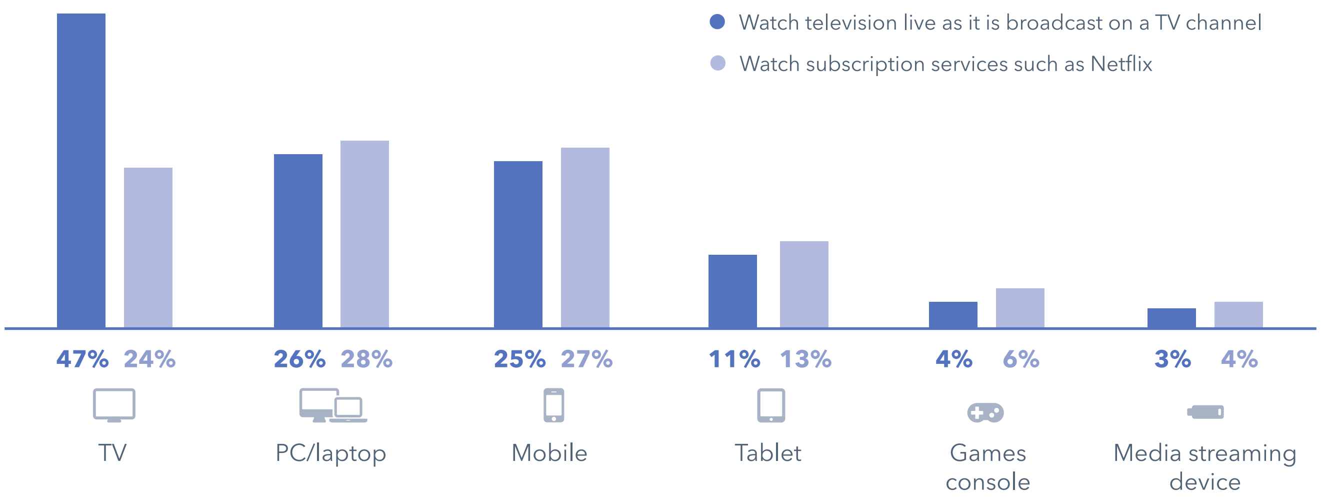
Putting a spotlight on TV sets, still the most popular device for watching TV overall, we can see that streaming services (24%) are some way behind broadcast TV (47%). Even in North America, where streaming services have the greatest adoption rates, offline TV (55%) leads online TV (52%). **Despite the smaller screen size, a fair share of Millennials are still turning to mobile for live TV (25%) and streaming services (27%)** - in both cases only narrowly less so than computers. As with all types of entertainment, Millennials want to have access on-the-go.

4a. Question: In the past month, which devices have you used to do the following? This includes any TV you watch in your home, office, while traveling or in any other location... **Source:** GlobalWebIndex Q3 2017 **Base:** 29,671 Internet Users aged 21-34

4b. Question: We'd like to ask you about how you engage with television. 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 Q3 2017 **Base:** 29,671 Internet Users aged 21-34

4a. TV ENGAGEMENT BY DEVICE

% of Internet Users aged 21-34 who have engaged with TV in the following ways in the past month



4b. BINGE WATCHING

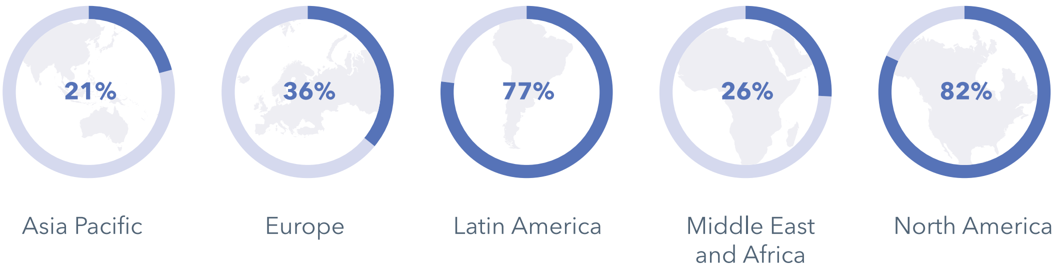
% of Internet Users aged 21-34 who select the following point on the scale when asked about binge watching

1. I regularly watch back-to-back episodes from the same TV show in one go*	**24%**
2	**24%**
3	**28%**
4	**14%**
5. I never watch back-to-back episodes from the same TV show in one go	**10%**

*e. g. by using on-demand, box-set or streaming services

4c. NETFLIX USAGE

% of Internet Users aged 21-34 who have used Netflix in the last month across the following regions



Netflix may be the name most widely associated with TV streaming, but its penetration in its content-rich home markets of LatAm (77%) and North America (82%) is far greater than any other region, with fewer than a quarter of European Millennials using it in the last month. **In North America, Netflix is some way ahead of Amazon Prime Video (38%) and Hulu (37%),** but within Europe, national services such as BBC iPlayer in the UK and MYTF1 in France offer stiffer competition, taking a 60% and a 44% audience share in their respective home markets. Local competition impacts in fast-growth regions as well; iQiyi (38%) is the leader in APAC's competitive streaming scene, and, in MEA, Shahid.net (32%) is top.

Second-screening is a firmly mainstream activity, with 78% of Millennials doing so via mobile, and 29% via a laptop. Millennials are most likely to be heading to social when they second-screen, **with 47% using social networks and 48% messaging friends.** While second-screening holds potential as a contact 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.** Only 21% search for information related to what they're watching, and just 12% interact with the online content of a TV show.

While Millennials are keen to adopt new platforms for TV content, they are still watching more linear TV than online

4c. Question: In the last month, which of these services have you used to watch/download TV shows, films or videos? Netflix **Source:** GlobalWebIndex Q3 2017 **Base:** 29,671 Internet Users aged 21-34

4d. Question: When watching TV, which of these things do you often do on another device at the same time? **Source:** GlobalWebIndex Q3 2017 **Base:** 36,986 Internet Users aged 21-34

4d. SECOND-SCREEN ACTIVITIES

% of Internet Users aged 21-34 who often do the following while watching TV

Chat to / message friends	48%
Use social media	47%
Play games	34%
Read my emails	32%
Read the news	28%
Search for products to buy	24%
Search for information related to what I'm watching	21%
Share my opinion of a TV show	13%
Interact with the online content of the TV show	12%

5. Music Streaming

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. **Spotify leads the music-streaming market among Millennials in Latin America (54%) and North America (40%), but the figure falls to 30% in its native Europe,** even accounting for the 69% of Swedish Millennials who use it.

As with TV, there are local players which come to prominence in their respective regions; QQ Music and Kugou are the top performers in APAC, while Anghami takes a quarter of the market in MEA. Deezer should not be discounted from the picture, as it holds on to a 15% share in Latin America, while **SoundCloud is the market leader in MEA,** where 52% have used it in the past month, including 72% in Egypt.

5a. 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 Q3 2017 **Base:** 29,671 Internet Users aged 21-34

5b. Question: In the last month, which of these services have you used to listen to/download music, radio or audiobook content? **Source:** GlobalWebIndex Q3 2017 **Base:** 29,671 Internet Users aged 21-34

5a. MUSIC OWNERSHIP VS. ACCESS

% of Internet Users aged 21-34 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	**25%**
2	**24%**
3	**27%**
4	**14%**
5. I prefer to own the songs I listen to (e.g. by purchasing albums or paying for downloads)	**10%**

5b. MUSIC OTT SERVICES

% of Internet Users aged 21-34 who have used the following services in the last month across the following regions

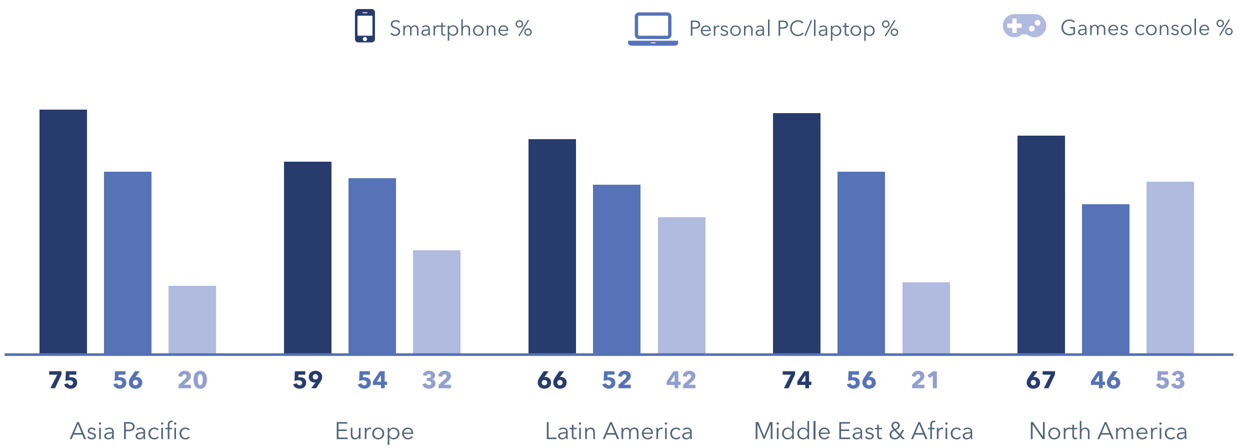
	Asia Pacific	Europe	Latin America	Middle East / Africa	North America
Anghami	-	-	-	**25%**	-
Apple Music	**16%**	**7%**	**7%**	**13%**	**10%**
Kugou	**31%**	-	-	-	-
Kuwo	**22%**	-	-	-	-
QQ Music	**34%**	-	-	-	-
Spotify	**14%**	**30%**	**54%**	**8%**	**40%**

ENTERTAINMENT

6. Gaming

6a. GAMING

% of Internet Users aged 21-34 who use these 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 these devices the most popular in North America (56%). Latin America and Europe follow with 35% and 35% respectively.

Smartphone gaming is popular in all markets, with Asia Pacific (75%) and the Middle East & Africa (74%) the top performers. The lack of a historic console-owning market in APAC helps boost figures for mobile gaming, and the legacy of PC gaming in the area means that APAC shares the lead for that device with MEA (56%). **As with much of Millennials' online activity, however, smartphone and console gaming are facets of multi-device behavior,** rather than being in direct competition with each other.

6a. Question: Which of these devices do you use to play games? **Source:** GlobalWebIndex Q3 2017
Base: 29,671 Internet Users aged 21-34

TREND IN ACTION:

Esports at the Asian Games

Competitive videogames will become an event at the 2022 Asian Games, the second-largest transnational sporting competition in the world behind the Olympics. With athletics reeling from stories of corruption and doping, competitive versions of games like League of Legends and Starcraft II have been chosen to re-engage Millennial viewers. The Asian Games offers a significant platform for awareness and participation in this market to grow.

Despite Sony manufacturing their last PlayStation 3 in May 2017, it remains the most widely-owned console. Sony have had more success here as **not only is its successor the PlayStation 4 the second most widely-owned console, it is also the most desired as a purchase,** with 3 in 10 Millennials saying that they would be interested in purchasing one.

37% of Millennials have played a game streamed over the internet in the last month, though this is inflated by the dominance of mobile games in Asia Pacific, particularly those integrated with multiplayer and social services like Tencent QQ and WeChat - the figure falls to 22% in North America and 18% in Europe. **A quarter of Millennials have watched a live gaming stream in the last month, and 1 in 5 have watched an esports tournament over the same time,** showing a solid level of engagement with the burgeoning esports sector. **We should therefore expect esports to emerge from the margins into the mainstream in the coming years,** as gaming itself once did.

6b. Question: Thinking about the gaming devices listed below, can you tell us which you have at home or are interested in purchasing? **Source:** GlobalWebIndex Q3 2017 **Base:** 29,671 Internet Users aged 21-34

6c. Question: Which of the following gaming-related activities have you done in the last month? **Source:** GlobalWebIndex Q3 2017 **Base:** 29,671 Internet Users aged 21-34

6b. CONSOLE BRANDS

% of Internet Users aged 21-34 who use/are interested in buying the following console brands

6c. GAMING ACTIVITIES

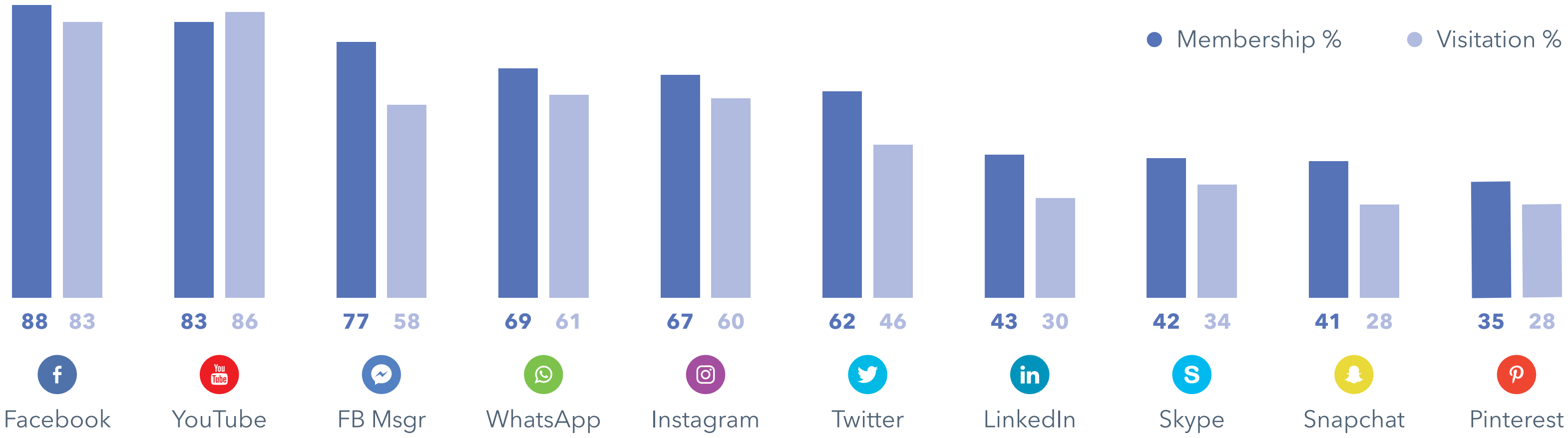
% of Internet Users aged 21-34 who have done the following gaming-related activities in the last month

Played a game that you have streamed over the internet	**37%**	1.17
Watched a live gaming stream	**26%**	1.27
Watched an esports tournament	**19%**	1.30
Purchased a video game from an online store	**19%**	1.26
Connected a games console to the internet in order to play games	**15%**	1.25
Purchased a game add-on or DLC (Downloadable Content)	**14%**	1.28
Used a subscription service	**13%**	1.28
Broadcast a live stream of your gameplay	**11%**	1.29

7. Social Behaviors

7a. TOP SOCIAL NETWORKS

% of Internet Users aged 21-34 outside China who are members/visitors of the following social platforms



9.39
Average number of social networks

Fittingly for the generation which grew up with social media, **Millennials spend 2 hours and 38 minutes on social media each day.** They're not spending this on just one platform; with the typical Millennial internet user having an average of over 9 social media accounts, **multi-networking is now the norm.** And, while not all networks 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. The one platform that can truly challenge the reach of Facebook is YouTube,** which is also notable for drawing in more visitors/users (86%) than it has members (83%, a result of visitors to the site not needing to sign up for an account). **Within China, WeChat (86%) is the dominant force,** with microblogging platform Sina Weibo (67%), video service Youku (64%) and Qzone (63%) in the next tier of services.

Looking back outside of China, Millennials over-index for visiting Instagram and Snapchat, though the former has a much stronger performance for visitor numbers, with 61% visiting in the last month, compared to 29% for Snapchat. **Instagram is ahead of Snapchat in all markets,** though in North America it's much more even, with 48% visiting Snapchat, compared to 63% for Instagram. **Pinterest (43%) is another contender in North America's social media landscape.**

The average Millennial has about 9 social media accounts

With filling up spare time (44%) one of the key reasons cited for using social media, **it is unsurprising that some Millennials are visiting social networks but not posting,** with 38% of Facebookers and 31% of Instagrammers saying they logged in just to see what's going on in the last month on those services. Given that **93% of Millennials are accessing social networks on smartphones,** filling in time while on-the-go goes some way to explaining the tendency for passive browsing. All that said, however, **on most of the major platforms, most members are visiting/ using on a monthly basis,** ensuring that ads and content can be delivered and revenues generated.

7a. Question: 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 Q3 2017 **Base:** 30,482 Internet Users aged 21-34 outside of China

Video is a calling card for social visits – 54% of Millennials outside China have watched a video in the last month on Facebook, Twitter, Instagram, or Snapchat. With 4 in 10 Millennials saying they visit social media to find funny or entertaining content - more than are visiting to share photos or their opinion - it's clear **that social media is a platform for them to find entertainment content online,** and that for Millennials, social media is more about *consumption* than *contribution.*

But this focus on entertainment doesn't exclude news media; a similar proportion say they visit social services to stay up-to-date with news, and they over-index for using it to make sure they don't miss out on anything, and to follow celebrity news. Helped by their smartphones, Millennials are constantly checking in with what's happening, and using social media to do so. The extent to which social informs how Millennials consume news is shown by the fact that **more of them (56%) find their news through social than through publisher websites (44%).**

While social is important for product research (as we will detail later) **social commerce has yet to take root** in most markets (with China and some other Asian markets being notable exceptions). Only 17% of Millennial Instagrammers say a buy button (on any network) would motivate them to buy online, for example. So, **brands should be careful to take a rounded approach to social commerce,** recognizing that social has a greater role in brand research and discovery than it currently does for completing purchases.

7b. Question: What are your main reasons for using social media? **Source:** GlobalWebIndex Q3 2017
Base: 29,671 Internet Users aged 21-34

7c. Question: Who do you follow on social media?
Source: GlobalWebIndex Q3 2017
Base: 29,671 Internet Users aged 21-34

7b. SOCIAL MOTIVATIONS

% of Internet Users aged 21-34 who cite the following reasons for using social networking services

To fill up spare time	**44%**
To stay in touch with what my friends are doing	**43%**
To stay up-to-date with news and current events	**43%**
To find funny or entertaining content	**42%**
General networking with other people	**37%**
To share photos or videos with others	**35%**
Because a lot of my friends are on them	**35%**
To share my opinion	**32%**
To research / find products to buy	**32%**
To meet new people	**31%**

TOP 3 OVER-INDEXES

To follow celebrities / celebrity news	1.19
To make sure I don't miss out on anything	1.18
To network for work	1.17

7c. SOCIAL MEDIA FOLLOWING

% of Internet Users aged 21-34 who follow the following people or organisations on social media

People you know in real life	**54%**	1.01
Brands you like	**42%**	1.13
Actors	**39%**	1.24
Singers, musicians or bands	**36%**	1.18
News / media organizations	**33%**	1.05
Contacts relevant to your work	**32%**	1.10
Comedians	**29%**	1.26
Brands*	**27%**	1.10
Sports stars	**26%**	1.19
Bloggers	**25%**	1.22

*you are thinking of buying something from

TOP 3 OVER-INDEXES

Vloggers	**19%**	1.28
Comedians	**29%**	1.26
Actors	**39%**	1.24

8. Brand Discovery

Millennials may be enthusiastic about engaging with new types of media but more mainstream marketing sources perform the strongest for brand discovery; the top channels here are search engines (37%) and TV ads (34%). **Despite half of Millennials saying they've blocked ads in the last month, almost a third have discovered brands through ads seen online** (a reminder of the impact of whitelisting and selective blocking). **But the extent of ad-blocking shouldn't be underestimated;** at least a third of Millennials in all regions are doing so, with Asia Pacific (55%) and North America (50%) the regions where ad-blocking is most mainstream. APAC sees mobile ad-blocking at closest parity with PC, thanks to the prevalence of mobile-first browsing in that region.

Ad-frustration is the primary reason why Millennials choose to block ads, with 49% reporting that there are too many on the internet, and the same number saying that they are annoying or irrelevant. Evidently, it's the poor user experience which 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. Some individuals will always have reservations about receiving targeted or personalized messages, but among current ad-blockers at least, **serving fewer and more relevant ads provide one of the only hopes of reversing this trend.**

Millennials are 23% more likely to discover a brand through a vlog, 23% more likely via a celebrity endorsement, and 19% more likely through an expert blogger post. **All three of those over-indexes 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. While Millennials are highly engaged with social, **they are in fact more likely to discover a brand through a word-of-mouth recommendation than they are through a comment on a social network** or an update on a brand's social media page. Millennials may be digitally fluent on the whole, but for them, offline sharing is still as relevant as the online kind in discovering brands.

8a. Question: In which of the following ways are you most likely to find out about new brands, products, or services? **Source:** GlobalWebIndex Q3 2017
Base: 36,986 Internet Users aged 21-34

8a. TOP 10 BRAND DISCOVERY CHANNELS

% of Internet Users aged 21-34 who say that they find brands via the following channels

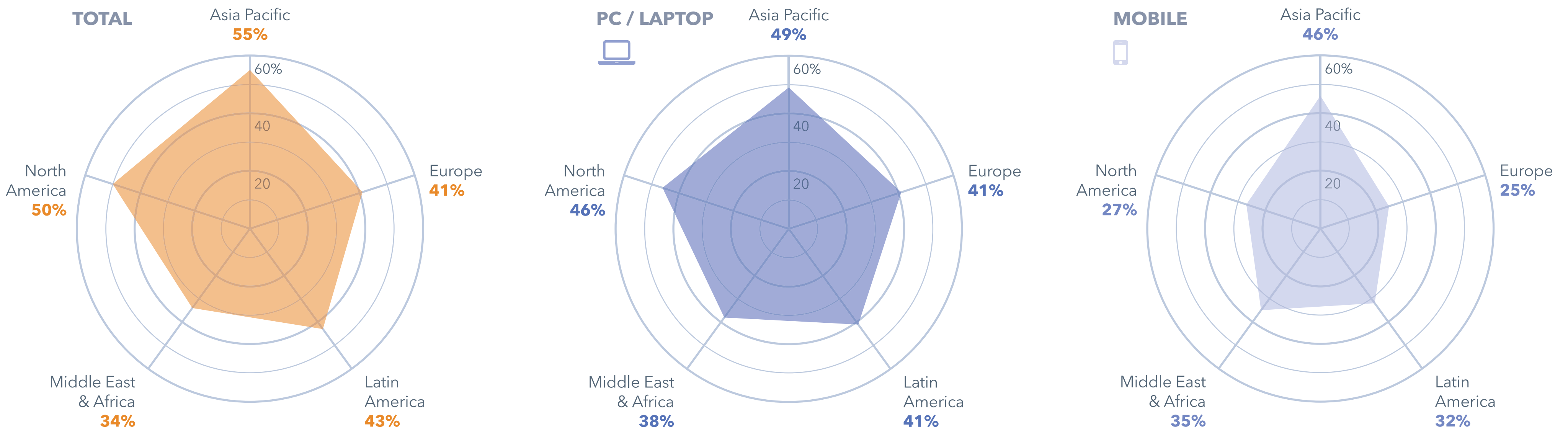
Search engines	37%
Ad seen on TV	34%
Word-of-mouth recommendation from friends / family	32%
Ad seen online	32%
TV shows / films	27%
Recommendation / comment on a social network	27%
Brand / product websites	26%
Consumer review sites	24%
Ad seen on mobile or tablet app	23%
In-store product displays or promotions	21%

TOP 3 OVER-INDEXES

1.23	Endorsement by a celebrity or well-known individual
1.23	Vlogs
1.19	Post or review from an expert blogger

8b. AD-BLOCKING BY REGION

% of Millennials who use ad-blocking software monthly across the following regions on the following devices



8c. TOP 5 AD-BLOCKING MOTIVATIONS

% of ad-blocking Millennials who do so for the following reasons

49% — There are too many ads on the internet

49% — Too many ads are annoying or irrelevant

46% — Ads are too intrusive

43% — Ads sometimes contain viruses or bugs

40% — Ads take up too much screen space

8b. Question: Which of the following have you done in the last month? | On average, how frequently do you use an ad-blocker on the following? **Source:** GlobalWebIndex Q3 2017 **Base:** 29,671 Internet Users aged 21-34

8c. Question: What are your main reasons for blocking ads while you use the internet? **Source:** GlobalWebIndex Q3 2017 **Base:** 29,671 Internet Users aged 21-34

9. Product Research

As with discovery, **search engines are the first port of call for further research of a brand,** with 49% of Millennials using that channel. But social networks (44%) are not far away, underlining **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 particularly relevant in MEA, with two-thirds of Millennials there using them to research products and brands. In MEA and Latin America, **Millennials are more likely to use social than search in their product research.** Search and social are the top two research channels in each region except for North America, where consumer reviews (43%) reach second place.

The over-indexes here are more specific instances of social, with pinboards, vlogs, and micro-blogs all finding favor. But it should be remembered that none of them command a sizable proportion of the overall audience, with micro-blogs used the most of the three, but achieving only a 15% audience share.

For Millennials in LatAm and MEA, social trumps search for product research

9a. TOP 10 PRODUCT RESEARCH CHANNELS

% of Internet Users aged 21-34 who say that they research products/services via the following routes

Search engines	49%
Social networks	44%
Consumer reviews	35%
Product / brand sites	29%
Mobile apps	28%
Price comparison websites	24%
Video sites	20%
Question & Answer sites	18%
Discount voucher / coupon sites	18%
Blogs on products / brands	17%

TOP 3 OVER-INDEXES

1.24	1.21	1.16
Micro-blogs	Vlogs	Online pinboards

9a. 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 Q3 2017 **Base:** 36,986 Internet Users aged 21-34

TREND IN ACTION:

Contiki's Social Creators

Founded in the 1960s to target vacationers from Oceania traveling abroad for the first time, youth travel company Contiki have adapted their marketing strategy to tap into the digital trends driving their core market. Their YouTube and Instagram channels are characterized by photos and films shot by their customers, and often with a 'Behind the Scenes' label. A sense of exclusivity, coupled with trust in third-party creators to contribute to their marketing material, show that Contiki understand how to connect with their Millennial audience.

10. Brand Interactions

56% of Millennials visit a brand's website each month, making this the most popular brand interaction point by some distance. With a quarter having visited a brand's social network page in that time and the same number following brands on social media, it's clear that **social networks are a key touchpoint for Millennials,** with this audience used to interacting with brands in the same space they do their friends.

Millennials are 21% more likely to have played a branded game in the last month, and 19% more likely to have interacted with a brand on a messaging app, which indicates that **Millennials are willing to engage directly with online marketing, if the content is compelling enough.**

These over-indexes show how content-minded Millennials are as a generation, to the extent that it influences how they wish to engage with brands. Throughout the purchase journey, Millennials over-index for interacting with brands through content, particularly entertainment content, and often via third parties. **With ad-blocking ingrained for half of this audience, and Millennials more likely to say they want brands to provide entertaining videos/content, brands need to think carefully about how to engage Millennials beyond simple push messaging.**

Ecommerce is mainstream for this audience, as three-quarters of Millennials have purchased a product online on any device in the last month. More Millennials are doing so through mobiles (51%) than computers (46%), though Latin America, North America and Europe still prefer to shop on PCs. Millennials in APAC, aside from being predominantly mobile-first internet users, also benefit from the one-stop-shop offering of services like WeChat, where vendors can easily integrate into the social platform.

Throughout the purchase journey, Millennials over-index for interacting with brands via content

10a. Question: Which of the following actions have you done online in the past month?
Source: GlobalWebIndex Q3 2017
Base: 29,671 Internet Users aged 21-34

10a. TOP 10 BRAND INTERACTIONS

% of Internet Users aged 21-34 who have interacted with a brand in the following ways in the last month

Visited a brand's website	56%
Watched a video made by a brand	25%
Liked / followed a brand on a social network	24%
Visited a brand's social network page	23%
Read an email / newsletter from a brand	22%
Downloaded / used a branded app	18%
Used a social networking "share" button on a website	18%
Read a branded blog	16%
Clicked on a promoted / sponsored post on a social network	16%
Asked a question to a brand on a social network	15%

TOP 3 OVER-INDEXES

1.21

Played a branded game

1.19

Provided ideas for a new product / design

1.19

Interacted with a brand on a messaging app

11. Purchase Behavior

The most influential purchase driver is free delivery (58%), and an easy returns policy (36%) also performs well; another indicator of Millennials' desire for convenience, flexibility, and instant access. **The largest over-index is for a buy button on social media, but it is a far smaller proportion of Millennials (13%) who choose this than are actively researching through social (44%).** For now at least, Millennials are electing to navigate away from social media to dedicated ecommerce spaces at the point of purchase, rather than completing their transaction within the social interface. A lack of a seamless transition between pages and vendors is likely to be part of the reason for this.

Millennials are electing to navigate away from social media to dedicated ecommerce sites at the point of purchase

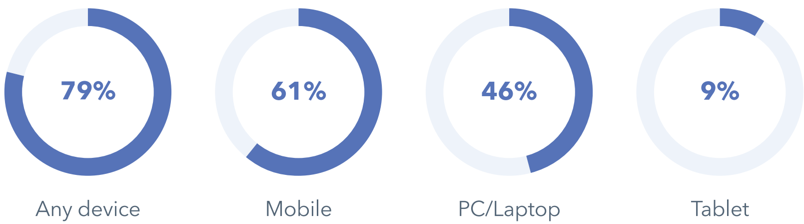
11a. | 11b. Question: When shopping online, which of the following things would most increase your likelihood of buying a product? | In the past month, which of the following things have you done on the internet via the following devices? Purchased a product online
Source: GlobalWebIndex Q3 2017
Base: 29,671 Internet Users aged 21-34

11a. TOP 5 PURCHASE DRIVERS

% of Internet Users aged 21-34 who say the following would motivate them to make a purchase

11b. E-COMMERCE BY DEVICE

% of Internet Users aged 21-34 who have purchased a product online in the past month on the following devices



TOP 3 OVER-INDEXES

1.23 Option to use "buy" button on a social network

1.20 Click & Collect delivery

1.14 Exclusive content or services

12. Post-Purchase Behavior

Much has been written on Millennials being a difficult audience to access. **One way to spread awareness is to spread along a network of reviewers. As over half 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 Millennials.

For them to do so, **the best prospect is providing a high-quality product, as almost half of all Millennials would advocate a brand for that reason, while 43% would do so for financial incentives. Image dictates the strongest over-indexes,** with Millennials being 13% more likely to advocate a brand to enhance their online reputation and 14% more likely to promote a brand to get access to exclusive content. In choosing exclusive content as a reason to advocate brands, Millennials once again show how their love of entertainment dictates much of their online behavior.

12a. Question: What would most motivate you to promote your favorite brand online?
Source: GlobalWebIndex Q3 2017
Base: 29,671 Internet Users aged 21-34

12a. TOP 10 BRAND ADVOCACY MOTIVATIONS

High-quality products	47%
Rewards (e.g. discounts, free gifts, etc)	43%
Love for the brand	35%
When something is relevant to my own interests	34%
When I've received great customer service	32%
The feeling of taking part / being involved	23%
When something is relevant to my friends' interests	22%
Having insider knowledge about the brand or its products	19%
When I have a personal / one-on-one relationship with a brand	18%
Access to exclusive content or services (e.g. music, videos, etc)	18%

TOP 3 OVER-INDEXES

1.14	1.13	1.09
Access to exclusive content or services (e.g. music, videos, etc)	When something enhances my online reputation / status	The feeling of taking part / being involved

Notes on Methodology

INTRODUCTION

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, GWI interviews over 350,000 internet users aged 16-64. 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 GWI 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 RESPONDANTS

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.**

Internet Penetration Rates Across GWI'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 the latest estimates on internet penetration (defined as the number of internet users per 100 people) from the International Telecommunication Union for each market that GlobalWebIndex conducts online research in. Please note that this will reflect internet penetration among the total population, and that the figure among 16-64s is likely to be higher.

INTERNET PENETRATION RATES (ITU INTERNET PENETRATION METRIC 2016)

Argentina	70.2	Hong Kong	87.3	Netherlands	90.4	South Korea	92.7
Australia	86.5	India	29.5	New Zealand	88.5	Spain	80.6
Belgium	86.5	Indonesia	25.4	Nigeria	25.7	Sweden	91.5
Brazil	59.7	Ireland	82.2	Philippines	55.5	Taiwan	79.7
Canada	89.8	Italy	61.3	Poland	73.3	Thailand	47.5
China	53.2	Japan	92.0	Portugal	70.4	Turkey	58.3
Egypt	39.2	Kenya	26.0	Russia	76.4	UAE	90.6
France	85.6	Malaysia	78.8	Saudi Arabia	73.8	United Kingdom	94.8
Germany	89.6	Mexico	59.5	Singapore	81.0	United States	76.2
Ghana	34.7	Morocco	58.3	South Africa	54.0	Vietnam	46.5

Sample Size by Market

This report draws insights from GlobalWebIndex's Q3 2017 wave of research across 40 countries, which had a global sample size of 94,314 (with 77,814 surveys completed on PC/laptop/tablet and 16,500 surveys completed on mobile). Among this sample, there were 36,986 Millennials. The sample by market breaks down as follows:

MARKET	TOTAL GWI SAMPLE	SAMPLE OF MILLENNIALS
Argentina	1,523	581
Australia	1,258	448
Belgium	1,257	397
Brazil	2,317	1,046
Canada	2,281	676
China	13,213	6,504
Egypt	1,269	626
France	2,254	650
Germany	2,252	614
Ghana	750	459
Hong Kong	1,243	502
India	3,117	1,777
Indonesia	1,778	1,070
Ireland	1,279	395
Italy	2,260	665
Japan	1,743	410
Kenya	750	440
Malaysia	1,541	838
Mexico	1,557	700
Morocco	750	370

MARKET	TOTAL GWI SAMPLE	SAMPLE OF MILLENNIALS
Netherlands	1,259	336
New Zealand	1,261	394
Nigeria	750	395
Philippines	1,506	748
Poland	1,256	470
Portugal	1,324	477
Russia	2,282	720
Saudi Arabia	1,251	585
Singapore	1,533	623
South Africa	1,570	715
South Korea	1,246	386
Spain	2,280	669
Sweden	1,264	440
Taiwan	1,233	480
Thailand	1,527	716
Turkey	1,509	655
UAE	1,252	648
United Kingdom	7,925	2,425
United States	16,110	5,062
Vietnam	1,584	874

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OUR PLATFORM

The questions and data-points featured in this report are available to explore on our Platform. They can be analyzed by any audience, data range or selection of countries/regions, with users able to build bespoke audiences based on our wide range of demographic, attitudinal and behavioral variables.

Each chart is accompanied by a hyperlink which will take you to the appropriate section on our Platform; simply click on the relevant link to start exploring the data further

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GWIQ

GWIQ offers clients the ability to create bespoke audiences on the platform by connecting the GWI panel and passively monitored visitation to their own websites/campaigns. Segment your visitors by the actions taken on your site then profile them utilizing the 100% declared data you already find in our platform. Validate digital campaigns against rich targets far beyond demographics. Understand the impact of digital campaigns on brand perceptions by sending bespoke advertising effectiveness surveys to panelists using a control vs exposed methodology.

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CUSTOM

GlobalWebIndex can also offer a variety of custom solutions to suit all your data and insight needs. All projects are conducted in close consultation with clients and resulting data is available for analysis in our platform.

Our Custom offerings include:

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Brand Profiling

PRODUCT SOLUTIONS
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Price Point
Platform Testing
Concept Testing

CAMPAIGN & AUDIENCE SOLUTIONS
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CLICK HERE To find out more about Custom

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