

MILLENNIALS

SUMMARY

GWI AUDIENCE REPORT

Analyzing the digital behaviors and attitudes of Millennials.

Q1 2016

Introduction

GWI Audience reports are designed to examine the digital behaviors of a particular group – showcasing trends over time as well as analyzing how the audience in question compares to the overall internet population.

In this report, we focus on Millennials – defined here as those who were 18-32 at the time of data collection; this term should be considered interchangeable with “Gen Y”.

Drawing primarily on a cohort of 42,460 online Millennials from our Q3 2015 and Q4 2015 waves of research, we focus on the following:

- **Overview of Millennials** – from their demographics to their attitudes, interests and motivations, what are the defining characteristics of this group?
- **Device Ownership and Usage** – how long are Millennials spending on mobiles each day and which other devices do they own?
- **Online Behaviors** – how many hours do they spend consuming media and what do they do when they second-screen?
- **Social Networking** – which social networks do they use, and how do Millennials behave inside the social space?
- **E-Commerce** – how many Millennials are buying online and what are the most popular products? What is most likely to motivate a Millennial to buy?
- **Brand Engagement** – how do Millennials research and discover brands and how do they interact with them? What reasons would encourage them to promote a brand online?

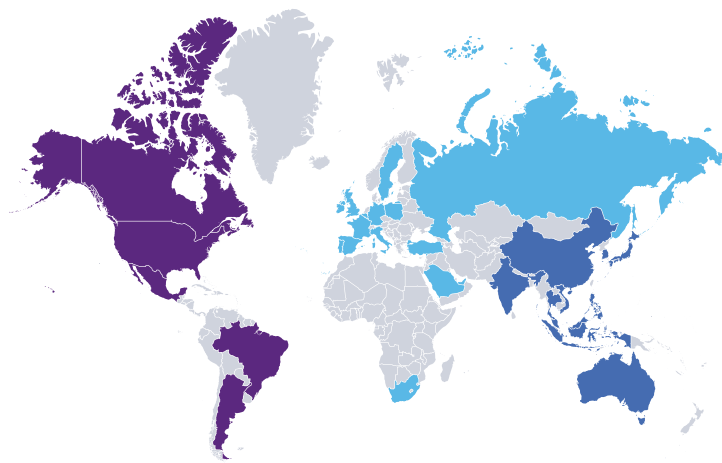
Related Content

To explore some of the topics covered in this report in more detail, please read the following reports:

- **Ad-Blocking** (Trend Report)
- **Second-Screening** (Trend Report)
- **Streaming Devices** (Trend Report)
- **Digital vs Traditional Media Consumption** (Insight Report)
- **Brand Discovery** (Insight Report)
- **Teens** (Audience Report)
- **Console Gamers** (Audience Report)
- **Vlog Watchers** (Audience Report)
- **Netflix** (Profile Report)
- **Spotify** (Profile Report)
- **YouTube** (Profile Report)

Notes on Methodology

Each year, GWI interviews **200,000 internet users across 34 markets** – making it the largest on-going study into the digital consumer instigated to date.



AMERICAS: Argentina ▪ Brazil ▪ Canada ▪ Mexico ▪ USA

EMEA: Belgium ▪ France ▪ Germany ▪ Ireland ▪ Italy ▪ Netherlands ▪ Poland ▪ Portugal ▪ Russia ▪ Saudi Arabia ▪ South Africa ▪ Spain ▪ Sweden ▪ Turkey ▪ UAE ▪ UK

APAC: Australia ▪ China ▪ Hong Kong ▪ India ▪ Indonesia ▪ Japan ▪ Malaysia ▪ Philippines ▪ Singapore ▪ South Korea ▪ Taiwan ▪ Thailand ▪ Vietnam

Research is conducted in quarterly waves, each of which has a global sample size of around 50,000 internet users. Typically, we interview between 3,000 and 8,000 people per year per market, with larger sample sizes in key countries such as the UK and the US (30,000 each). In this particular report, we draw primarily on our Q3 2015 and Q4 2015 waves of research among 102,621 adults, of which 42,460 were Millennials.

Respondents complete an **online questionnaire** that uses stratified sampling techniques to ensure that they are **representative of the internet population aged 16 to 64** in each country (with correct proportions in terms of gender, age and educational attainment).

Device Trends

How long are Millennials spending on mobiles each day and which other devices do they own?

- Among Millennials, smartphone ownership has now surpassed PC/laptop ownership – **87% have one**. What's more, the majority of these users cite smartphones as their most important device and Millennials are now spending 3 hours per day online via mobiles.

- There are clear disparities between how many devices the typical Millennial owns, and the number of devices used to access the internet. Globally, they might now own an average of 3.67 devices but are getting online via 2.69 of them.

- While headlines proclaiming the 'death of tablets' may be quick off the mark, these devices have hit a ceiling – **internet access via tablets has slowed considerably in recent quarters and actually reversed at the end of 2015**. Meanwhile, mobiles have upheld their momentum, with steady increases.

- Whereas Samsung remains the most popular phone brand among the general internet population, **among Millennials the iPhone is on par with its South Korean rival**. What's more, look at the brands that Millennials say they are interested in purchasing, and iPhone leaps into the lead.

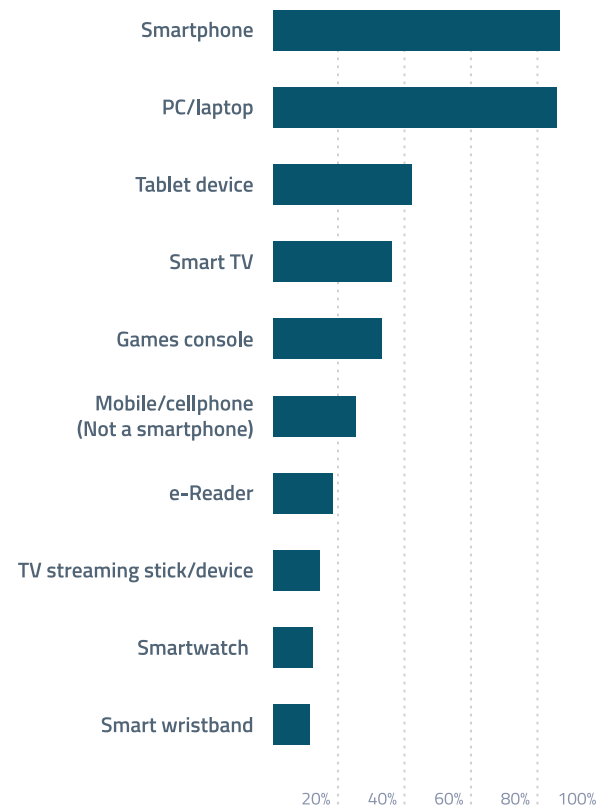
Question: Which of the following devices do you personally own? // Source: GlobalWebIndex Q3-Q4 2015 // Base: Internet Users Aged 18-32



Explore this data in PRO Platform // Click here: [Device Ownership and Access > Device Ownership and Usage > Device Ownership](#)

INTERNET DEVICES

% of Millennial internet users who own the following devices



NOTE: RESPONDENTS SEE THE FOLLOWING DEFINITIONS / ILLUSTRATIVE EXAMPLES:

Smartphone: a smartphone allows you to connect to the internet and download apps, e.g. an iPhone, BlackBerry or Android phone such as the Samsung Galaxy S6

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

Smart TV: a television that can connect to the internet.

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

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

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.

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

Online Behaviors

How many hours do they spend consuming media and how do they act online?

- Over 6 in 10 Millennials purchase some form of digital/online content each month, but there is still a significant gap between the numbers engaging with various forms of online services and those who are paying for them. There is reason for optimism here though – across all of the categories of paid-for content in our list, Millennials are much more likely than others to be purchasing them.

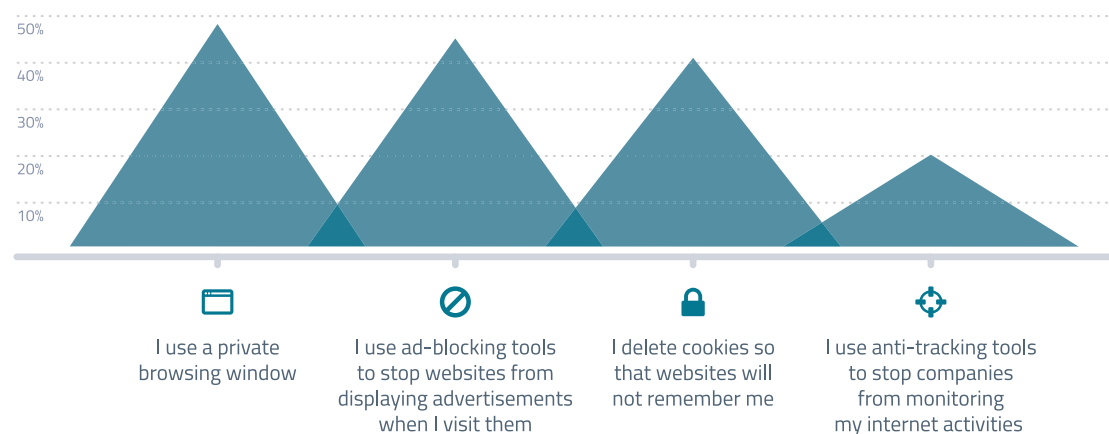
- Linear television continues to play a central role within the entertainment portfolio of Millennials; this group devotes an average of 2 hours per day to it (although this does put them almost half an hour below the average internet user for this metric). Online TV has hit its own landmark, with over an hour now being devoted to it.

- In the SVOD market, it's Netflix which is in pole position – around 1 in 2 Millennials are engaging with it each month. Spotify tops the list when we look at music streaming services – 1 in 8 are using it each month.

- Last month, over 4 in 10 Millennials used an ad-blocker, up almost 10-points from the previous quarter. The impact of the almost constant media coverage and a proliferation of ad-blocking software is having a clear impact on awareness of, and engagement with, these tools. But this trend does not necessarily equate to zero exposure to ads among these users – in fact, over 15% of ad-blocking Millennials say they have clicked on an online ad in the past month.

PRIVACY TOOLS USED LAST MONTH

% of Millennial internet users who use the following online privacy tools



Question: Which of the following things apply to you when you access the internet from your main computer? Have done in the past month
 /// **Source:** GlobalWebIndex Q4 2015 /// **Base:** Internet Users aged 18-32



Explore this data in PRO Platform
 /// Click here: [Device Ownership and Access > Privacy and VPNs > Online Privacy Measures](#)

Social

Which social networks do they use, and how do Millennials behave inside the social space?

- 91% of Millennials visited a social network last month. PCs/laptops maintain a slim lead over other devices for now for social networking. However, with ownership figures for smartphones having now overtaken computers, it's inevitable that the figures for mobile networking will continue to increase and ultimately overtake those for the more "traditional" devices.

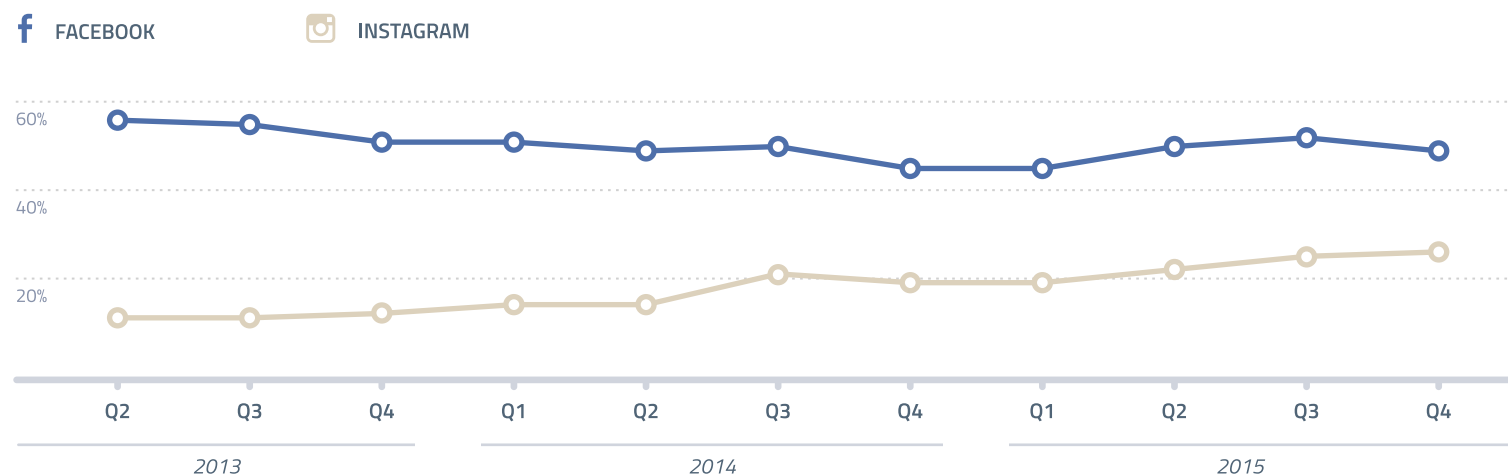
- Facebook retains its title as the most actively used social network among Millennials. YouTube takes second-place. However, look over to visitation rates, and YouTube takes top position over Facebook. Elsewhere, Instagram has more than doubled its active usage figures in the last few years, rising from 11-12% in 2013 to its current standing of 26%.

- Outside of China, Facebook Messenger takes the top spot in the messaging app market. WhatsApp then follows closely behind. WhatsApp has a clear lead when we look at frequency of engagement among monthly active users, and its role as a core communication platform means that most of its Millennial users are engaging more than once a day; for Messenger, this figure drops significantly.

- Millennials now average over 7.5 social media accounts and are active users of over 4 networks. By way of comparison, the average internet user is a member of just over 6 networks and is an active user of almost 4 of them. This helps explain why these digital consumers are devoting around 2.5 hours each day to social networking / messaging.

SOCIAL MEDIA ENGAGEMENT OVER TIME

% of Millennial internet users who are active users of the following



Question: Which of the following services have you used or contributed to in the past month using any type of device? // **Source:** GlobalWebIndex Q2 2013- Q4 2015 // **Base:** Internet Users Aged 18-32 (exc. China)



Explore this data in PRO Platform
 // Click here: [Social Media > Reach > Active Usage](#)

E-Commerce and Brand Engagement

How do Millennials discover, research and purchase products online?

- **8 in 10 Millennials** have bought a product online in the last month. PC/laptops are the most important device for this activity, but that over half of Millennials are already using smartphones to purchase online highlights their future potential. Millennials are most likely to be buying clothes online, but shoes and gifts are also popular items.

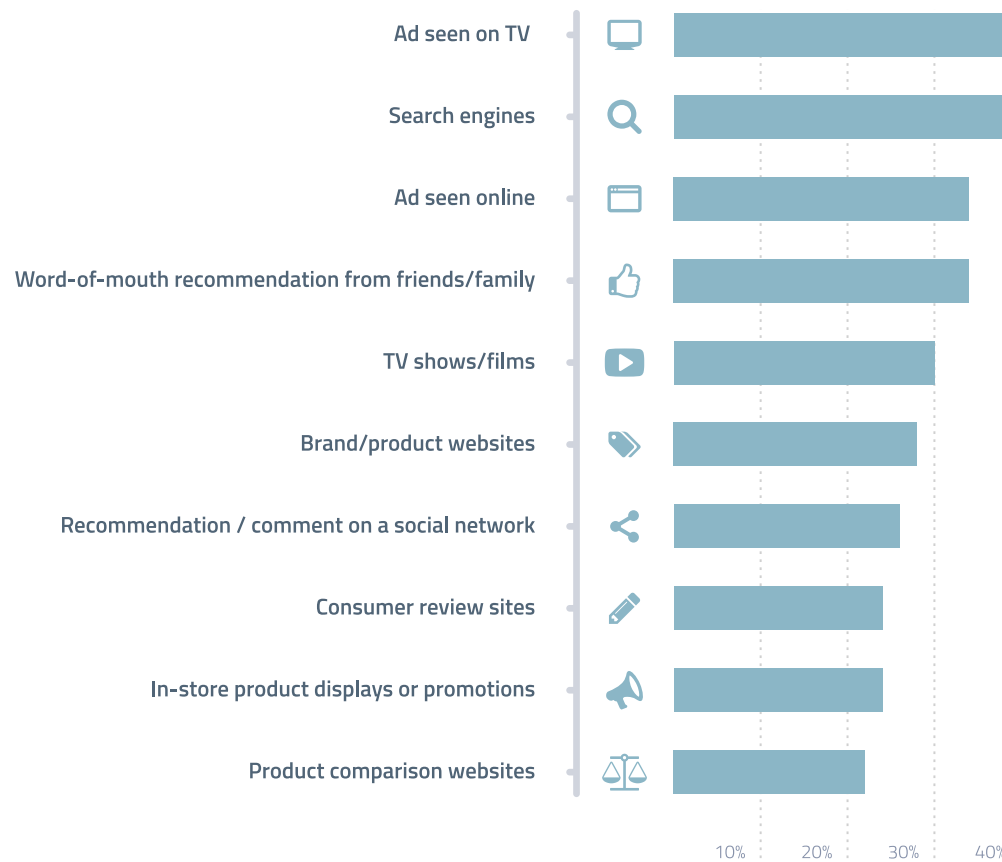
- **Overall, 4 in 10 say they find brands through ads seen on television.** In fact, entertainment is a key theme here, with TV shows and films also being important brand discovery routes. Despite the onset of ad-blocking, 1 in 3 Millennials find brands via ads seen online.

- **In terms of brand interactions, Millennials are most likely to have visited a brand's website** but this group over-indexes the most highly for interacting with a brand on a messaging service. While this may point to the future potential of this brand interaction channel, it's still less than 1 in 10 doing this each month.

- When it comes to the reasons why people would promote their favorite brand online, **Millennials are much more likely to value exclusive content such as music and videos.** The most important factor of all for Millennials is high-quality products – almost half would advocate a brand for this reason.

TOP 10 BRAND DISCOVERY CHANNELS

% of Millennial internet users who say that they find brands via the following channels



Question: In which of the following ways are you most likely to find out about new brands, products, or services?
 /// **Source:** GlobalWebIndex Q4 2015 /// **Base:** Internet Users aged 18-32



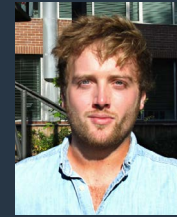
Explore this data in PRO Platform ///
 Click here:
Marketing Touchpoints
 > **Brand Discovery/Engagement**
 > **Brand Discovery**



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