Millennials

A marketer's manual

GWI.

In this report

Click the dots to navigate

Methodology & definitions

All figures in this report are drawn from GWI's online research among internet users aged 16-64. Our figures are representative of the online populations of each market, not its total population. Note that in many markets in Latin America, the Middle-East and Africa, and the Asia-Pacific region, low internet penetration rates can mean online populations are more young, urban, affluent and educated than the total population.

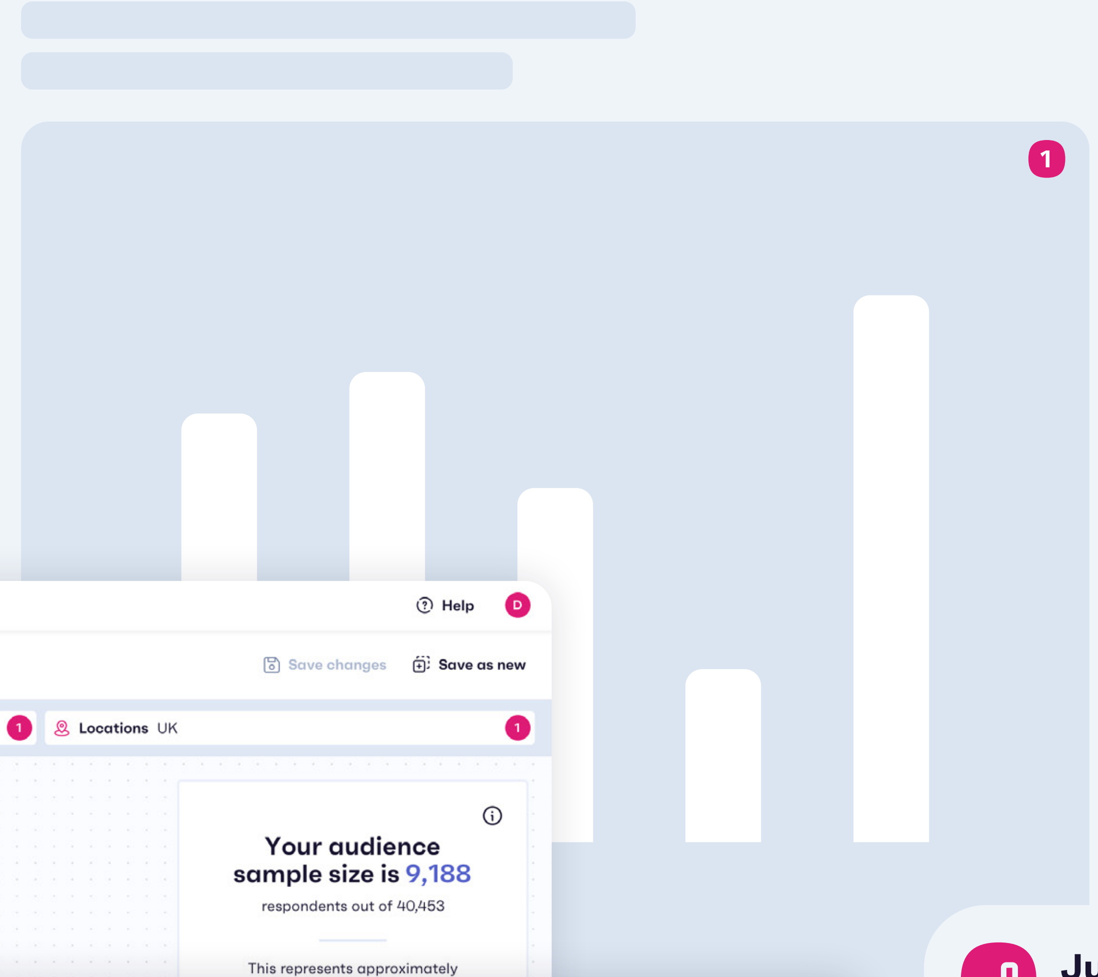
Each year, GWI interviews over 700,000 internet users aged 16-64 via an online questionnaire for our Core dataset. A proportion of respondents complete a shorter version of this survey via mobile, hence the sample sizes presented in the charts throughout this report may differ as some will include all respondents and others will include only respondents who completed GWI's Core survey via PC/laptop/tablet.

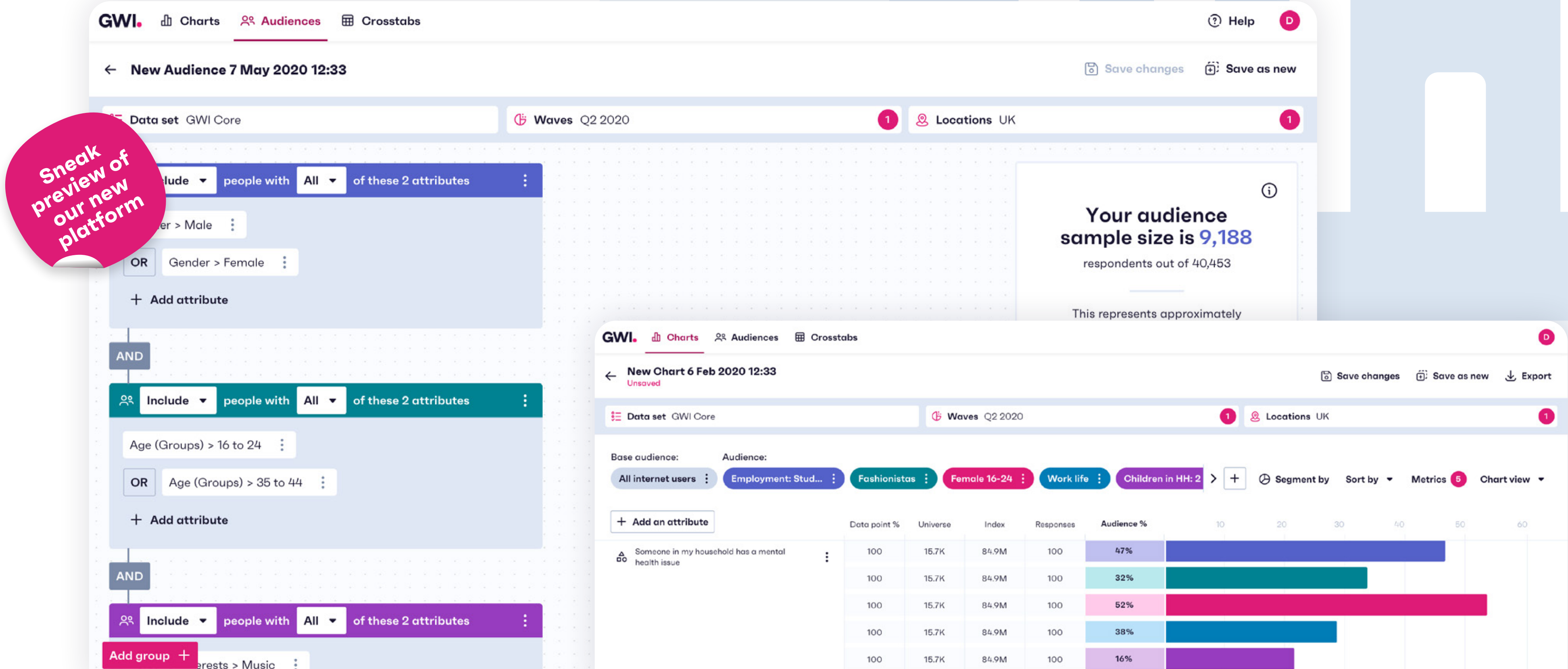
When reading this report, please note that we focus on data from our ongoing global quarterly research, but also refer to our monthly Zeitgeist studies across 9 markets, and our GWI USA dataset, which surveys over 20,000 internet users in the US aged 16+ each quarter.

Throughout this report, we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the global average. For example, an index of "1.20" means that a given group is 20% above the global average, and an index of "0.80" means that an audience is 20% below the global average.

Discover the data on our **platform**

Each chart from our ongoing global research in this report contains a hyperlink that will bring you straight to the relevant question on our Platform, where you can investigate all data by demographics, over time, and among your own audiences.





1 **Each of the graphs is numbered**

More information can be found in the Appendix section at the end of this report

Just click this icon to explore the data on the platform

Source

Base

Information about the source and base

Key insights

Millennials are maturing

While the oldest millennials are approaching middle age, their younger counterparts are stepping into more senior workplace roles. That means greater financial independence, opening the door to products they couldn't previously afford.

They're big on image

Millennials are health-conscious but image-conscious too. While there are legitimate opportunities for exercise and health-related brands to reach this generation, they need to consider how image-consciousness ties into mental health. Fashion brands, in particular, should think carefully about how they represent different body shapes in their marketing to help millennials from over-comparing themselves to others.

Online time is falling

While millennials are gradually spending more time using online media, their overall time online is lower than it was pre-Covid. There's several possible reasons for this: digital detoxing, nostalgia about older forms of media, or simply a changing lifestyle. Millennials are starting families and moving into senior roles, so their time is more precious than ever.

They will be early adopters of the metaverse

Millennials are among the most interested in the metaverse, just behind Gen Z. For it to truly captivate them, however, it will need to offer various activities beyond just new ways to shop – encompassing different media and hobbies they already enjoy in the real world.

Social media is central to their purchase journey

Social media is central to the millennial purchase journey – in some ways, more so than Gen Z. Brands already need a robust social media presence, but by implementing ways for them to discover and purchase products without ever opening a new window, they're more likely to nurture returning customers.

01 A millennial profile

Want more on the cost of living crisis?
Get the report

A look at millennials in 2022

Spanning the ages of 26-39, millennials are a diverse bunch and a key target for brands – especially as the youngest in this generation begin important life stages. Way back in 2015, they had a very different look about them; the majority were single, while few had married or had children. Many already worked full/part-time roles or even owned houses, but as of Q1 2022, it's clear to see how quickly some of these things have changed.

In many ways, it's possible that the pandemic prompted a rethink of the things that matter most. For those in their mid 20s that saw socializing grind to a halt, it was a time to focus more on work or family life.

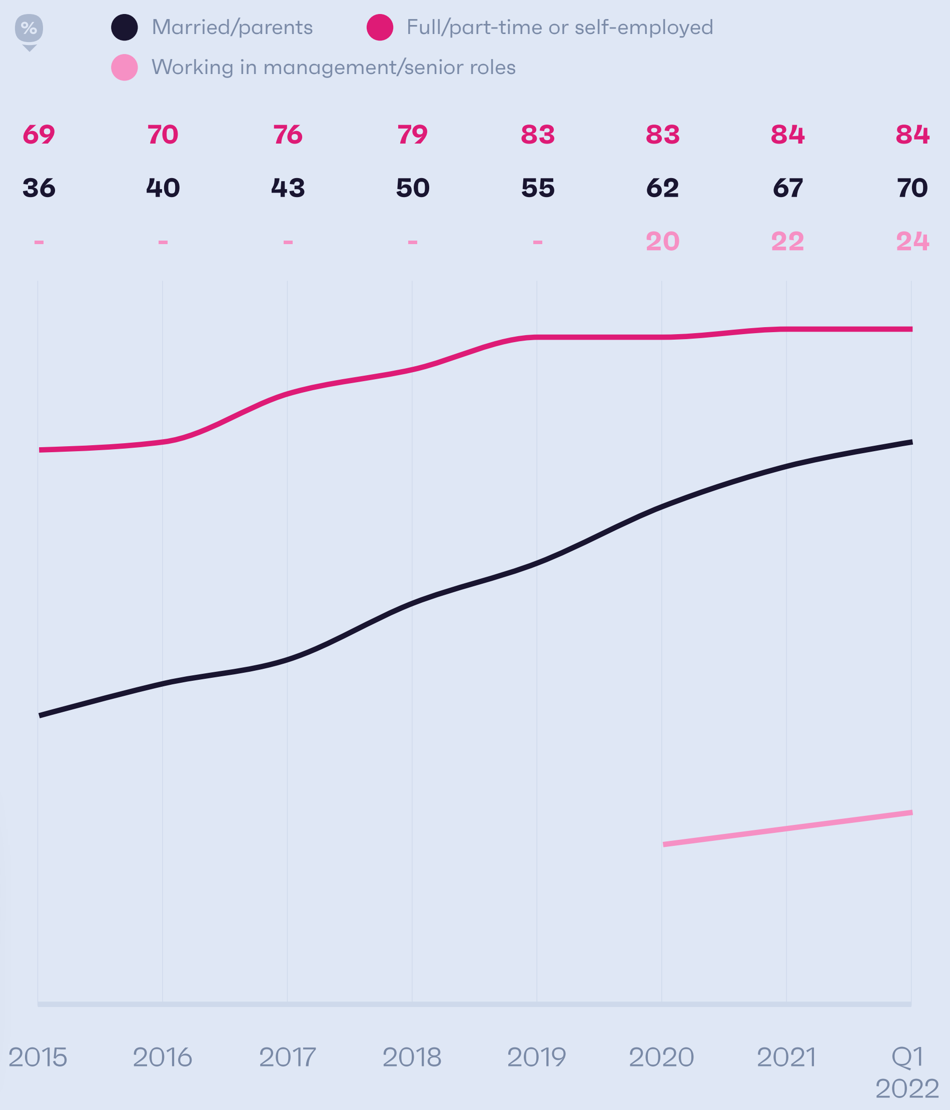
Our US dataset really lays out how much has changed. Among US millennials in Q2 2020, raising a family was 11th on a list of priorities. Fast-forward to Q1 2022, and it's 5th, with over 4 in 10 saying this.

And with all this change comes new opportunities. As millennials move into more senior roles, their purchasing power is likely to increase too. This kind of financial independence opens the door for new brands and services to reach this generation – some perhaps for the first time. However, there'll be challenges too. This is a generation **defined by recession**, and it's important to consider how the cost of living crisis will affect them down the line.

How are millennials getting on?

% of millennials who are...

1



GWI Core Q1 2019 - Q1 2022 82,819 millennials born between 1983-1996

Gen Z or Gen Y? Spotting the difference

Though frequently bundled in with Gen Z as 'younger consumers', there's a lot to distinguish millennials from their younger counterparts. While it's true that the two share some similarities, it's important to remember they aren't identical – take it from Gen Zs, **they're very keen to establish their own identity**.

Let's start with the things they have in common. They share a **similar digital monoculture**, meaning some of the lifestyle choices, attitudes, and behaviors attributed to millennials have essentially 'passed onto' the next generation.

Millennials saw the rise of the internet, and lived through important milestones in the digital era. Gen Z then grew up knowing only a connected world, meaning both got to experience the positives and the negatives that come with this, facing insecurities and **social pressures** their older counterparts didn't as much. That's not to mention things like climate change or the rising cost of living that play on their minds too.

It's a potential reason for why both generations have difficulty with mental health – more so than their older counterparts. It also explains why they share similar levels of concern for the future of things like the environment and the economy.

Some similarities, but still very different generations

Most distinctive interests among millennials compared to Gen Z (sorted by over-index).

Millennials	Gen Z
Esports	Esports
Gambling	Gaming
Adventure/extreme sports	Dance
Business	Adventure/extreme sports
Cars/motoring	Urban/modern art
Vegan food	Photography
Entrepreneurship	Fine art
Investments	Computers/coding
Reality TV	Playing sport
Beauty/cosmetics	Fashion

2

GWI Core Q1 2022

82,819 millennials aged 26-39 and 61,939 Gen Z aged 16-25

But while their outlook and worldview is similar, that doesn't mean they enjoy the same things. A quick look at their distinct interests reveals esports and extreme sports as the only things in common. Brands need to be mindful of how these subtle differences can come into play when attempting to engage with them – one size doesn't fit all when it comes to these generations, no matter how similar they might be.

Want to know more about how Gen Zs differ from millennials? **Download our Gen Z report**

Brands can make a difference by simply being more representative

Their image-consciousness has implications for marketers

Millennials are an active and **health-conscious generation**. Over two-thirds exercise regularly, 17% don't drink alcohol, and the number who eat fast food is falling steadily. Not all this work is for health reasons alone; 42% of millennials say they take care of their appearance, and 1 in 3 say it's important to be accepted by others.

But just 39% are happy with the way they look.

Not every millennial is exercising purely for superficial reasons; exercise and health-related brands have genuine opportunities to engage with this health-conscious generation. But what they need to be mindful of is how many are struggling to feel comfortable with their appearance – especially at a time where mental health issues are a growing concern. This is a much bigger problem among millennial women, among whom 1 in 3 say they scrutinize their appearance a lot, more than men or women from any other generation.

For fashion brands in particular, this means offering more inclusive sizes and using a wider range of body types in advertising. We discussed a similar trend regarding beauty in our **Connecting the Dots 2022** report, where we noted that brands can make a difference by simply being more representative. There are a number of brands taking this message on board, but it's worth noting that this is **often directed at Gen Z**. It's important to bear this in mind regarding millennials, and indeed, all other generations too.

Just 39% of millennials are happy with the way they look

The millennial spending paradox

Defined by the **economic struggles of the late 2000s**, millennials have a distinct attitude to money and finance. There's some similarities to Gen Zs here, but while these younger consumers are more money-driven, millennials are more money-aware; they're more likely to say they're good at managing money, or describe themselves as price-conscious.

This makes sense in context. Millennials are older, and have more experience with things like debt, mortgages, and the impact of a recession altogether. But even with greater awareness of their finances comes impulsiveness too, being distinctly ahead of the average when it comes to saying they make quick decisions or buy products at full price.

It's worth remembering that they have greater spending power now, meaning that although they're still cautious about saving, they're also more inclined to spend – leading them to make impulsive decisions from time to time.

Their tendency to go 'all-in' could also explain why they're keen investors, especially when it comes to **riskier assets like cryptocurrency**. Since 2019, the number of millennials who own this kind of investment has grown 65%.

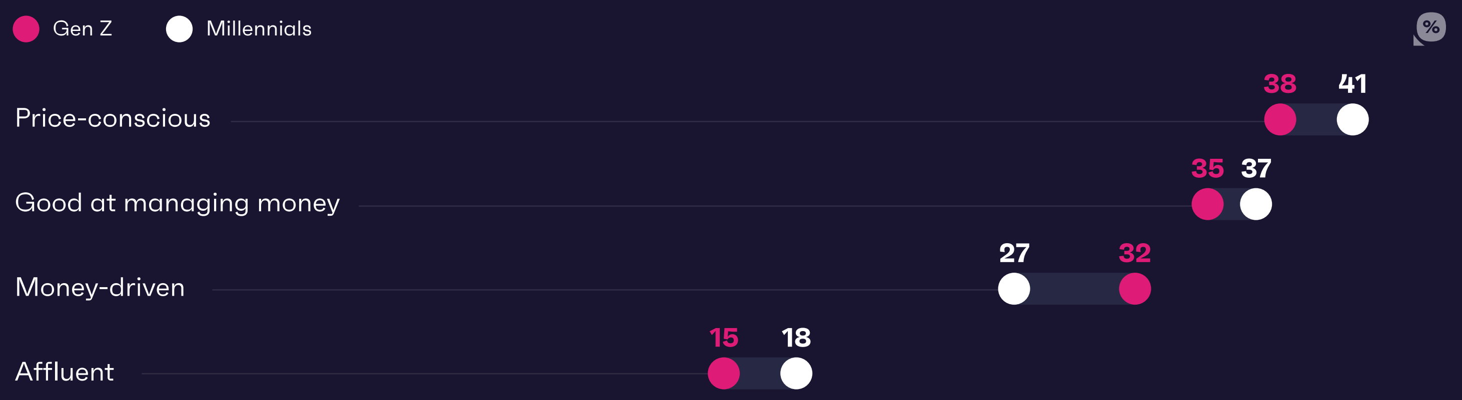
They'll still look out for ways to save money if they can, with free delivery or discounts among their top purchase drivers, but brands can certainly bank on millennials to be on the lookout for premium products too. It's worth remembering, however, that at a time where the cost of living is rising, there's a chance these behaviors could change. Even so, millennials are more confident about their money than you might think and it's possible that, in the face of recession, they're more than prepared to adapt accordingly.

> Although still cautious about saving money, Millennials do make impulsive decisions from time to time

Money-conscious, but impulsive too

3

% of millennials & Gen Zs who say the following describes them



GWI Core Q1 2022

82,819 millennials aged 26-39 and 48,413 Gen Zs aged 16-25

02
Entertainment & media

Want more juicy insights on the global entertainment scene?
Get the report

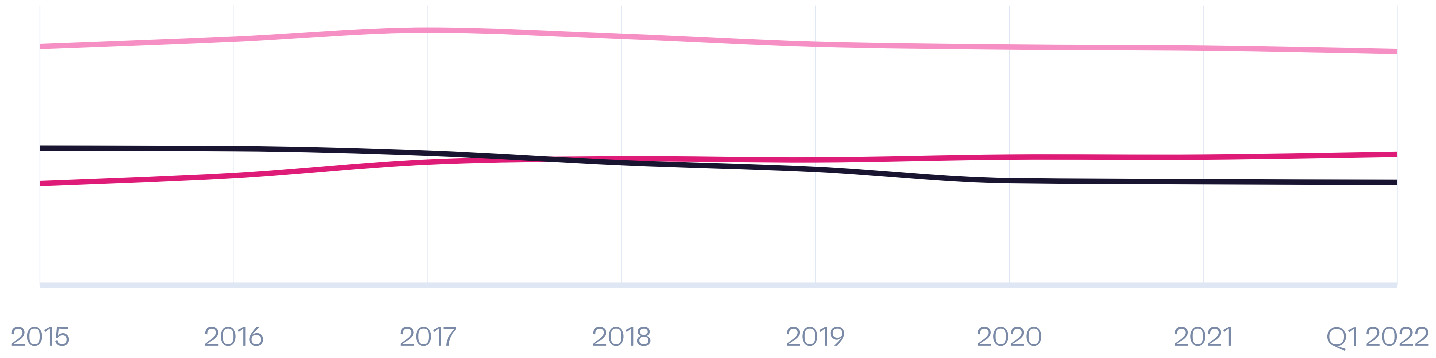
Online time is falling

4

Average daily time spent online on the following in h:mm

Mobile · PC/laptop/tablet · NET: Daily online time

	2015	2016	2017	2018	2019	2020	2021	Q1 2022
NET: Daily online time	7:07	7:20	7:36	7:25	7:11	7:06	7:04	6:58
PC/laptop/tablet	4:05	4:04	3:56	3:39	3:27	3:17	3:15	3:04
Mobile	3:02	3:16	3:40	3:46	3:44	3:49	3:49	3:54



GWI Core Q1 2015 - Q1 2022 · 1,336,648 millennials born between 1983 and 1996

Millennials and their media habits

Millennials spend more time using any of the formats we track than the average consumer – with the exception of broadcast TV, where daily time spent is on par.

Covid brought about a significant change in media habits across the world, and between 2019 and Q2 2020, millennials followed a similar pattern to other generations; time on things like online press, music streaming, games consoles, and online TV increased dramatically. As of Q1 2022, however, many of their old media patterns have returned. They're almost on par with 2019 figures for using games consoles, reading press (of any kind), and listening to the radio, while spending less time on social media.

What's interesting, however, is the time online that millennials spend across mobile/PC/laptops – it's fallen by 38 minutes since its peak in 2017, and 6 minutes from 2021 figures. It's still more time online than Gen X & baby boomers, but this is important in the long-term because it's a trend that also applies to Gen Z, who are spending less time online than they did during the pandemic.

What Covid meant for entertainment

Average daily time spent on the following in h:mm

5

	2019	Q1 2022	Change in daily time spent since 2019 in minutes
Online TV/Streaming	1:32	1:40	+8
Linear/Broadcast TV	1:50	1:55	+5
Music streaming services	1:39	1:43	+4
Broadcast radio	1:02	1:05	+3
Online press	1:20	1:23	+3
Physical print press	0:56	0:58	+2
Games consoles	1:23	1:25	+2
Podcasts	-	1:05	
Social media	2:42	2:37	-5

GWI Core Q1 2015 - Q1 2022 1,336,648 millennials born between 1983 and 1996

One possible explanation for this is digital detoxing. This isn't necessarily typical of millennials, given they're equally likely as Gen Zs to say they're using social media less, and fall behind their younger counterparts when it comes to worrying about the time they spend on their phones. But it does suggest that younger audiences are growing aware of their reliance on tech, and could spell the beginning of more significant change down the line.

Another thing to consider is their free time in general. As of Q1 2022, 62% of millennials are parents, while the number working in management/senior roles has grown 20% since 2020. All this is likely to come at a cost, as they make time for other things instead.

Watch this space: millennial viewing habits

Though many millennials will remember a time before TV streaming was the norm, they've been quick on the uptake; the number who purchased a streaming service subscription continues to rise year-on-year – an 84% increase since 2015.

While that's soared past the number who purchase TV series or movies to download individually, actual time spent watching streaming services still lags behind broadcast, with the latter ahead by 15 minutes. At the same time, more millennials actually watch online TV than broadcast (92% vs 87%), meaning that even though broadcast viewing sessions are longer, the format is increasingly fighting for attention.

So who are the big winners when it comes to streaming? A look at the global picture reveals millennials' preferences are more or less on par with the average streaming user; YouTube leads outright, with Netflix not far behind. Removing YouTube and its subsidiaries from the list puts Netflix ahead of the competition, with the 3rd spot often contended by region-specific services like Hulu and iQiyi, or other noteworthy services like Amazon Prime Video and Disney+.

What broadcasters and streaming services need to pay attention to here is brand discovery. While 3 in 10 millennials discover brands via TV ads, the number who discover via product placement on TV shows/films or ads before online videos aren't far behind (25% and 20% respectively). Down the line, as more sign up to streaming, this gives advertisers more effective ways of reaching this generation.

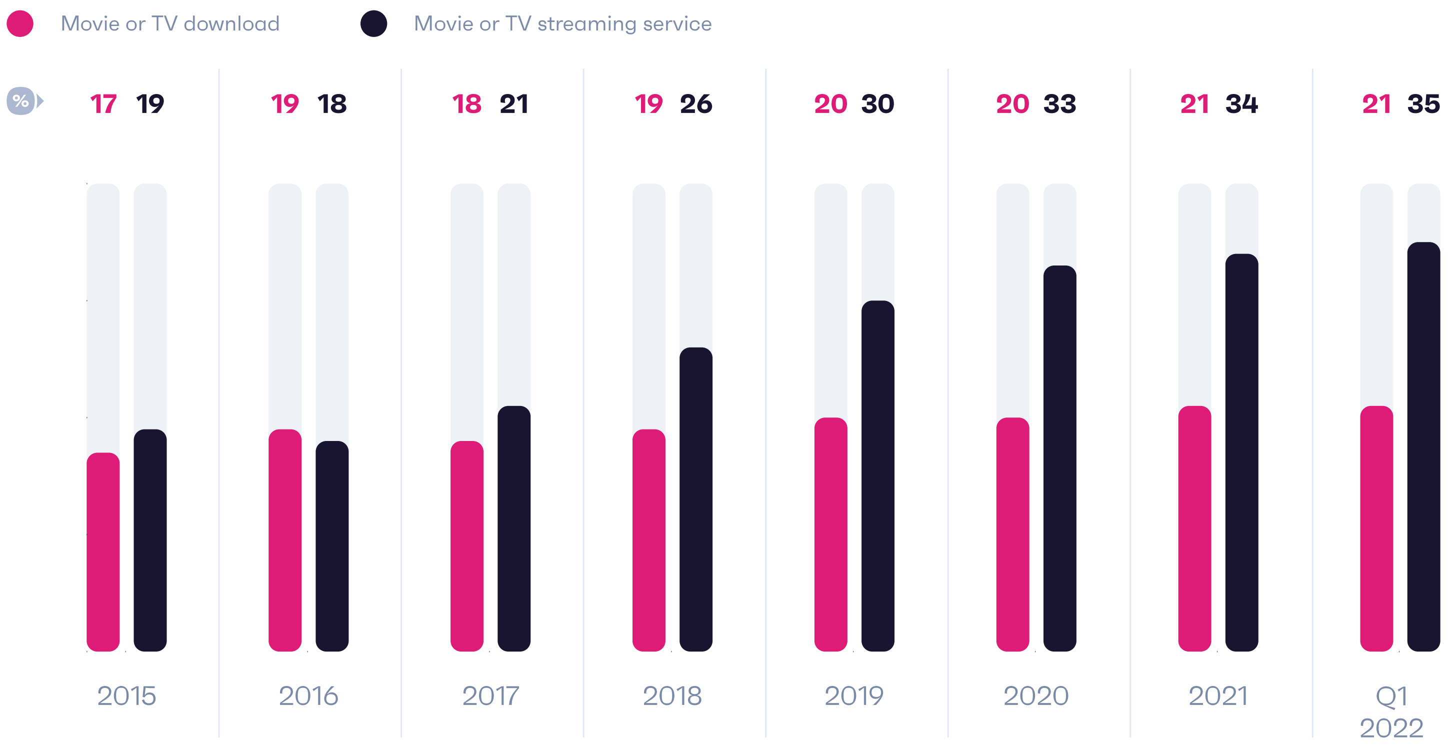
This is a heavily contested landscape, especially at a time where consumers need to make choices about the services they pay for. Content offering has never been more important, and with millennials yet to spend more time on streaming than broadcast, services with content from both may have an advantage. There's also the long-term to think about here. **Netflix reported a drop in subscribers** in 2022, and while that's unlikely to affect its position at the top, it's likely to bring in change for the landscape – things like **ad-supported accounts**, restrictions on **password sharing**, and plenty of new players in this space.

25% of millennials discover brands via product placement on TV shows/films

The rise of TV streaming

6

% of millennials who have purchased the following in the last month



GWI Core 2015-2022 (Averages of waves conducted between Q1 2015 - Q1 2022). 1,336,648 millennials born between 1983 and 1996

Top streaming/ video services around the world

% of millennial streaming service users who watch on the following platforms

APAC	%
YouTube	48
Netflix	28
iQiyi*	21
Disney+ Hotstar	20
Amazon Prime Video**	17

North America	%
Netflix	75
YouTube	63
Disney+	51
Hulu	50
Amazon Prime Video	49

MEA	%
YouTube	86
Netflix	57
Shahid.net	24
YouTube Kids	18
Amazon Prime Video	17

Latin America	%
Netflix	83
YouTube	80
Amazon Prime Video	47
Disney+***	45
HBO Max***	31

Europe	%
YouTube	74
Netflix	59
Amazon Prime Video	27
Disney+	17
YouTube Premium	14

Global (Excl. China)	%
YouTube	77
Netflix	62
Amazon Prime Video**	34
YouTube Premium	20
Disney+	18

*China and Malaysia only

**Not China

***Selected markets only

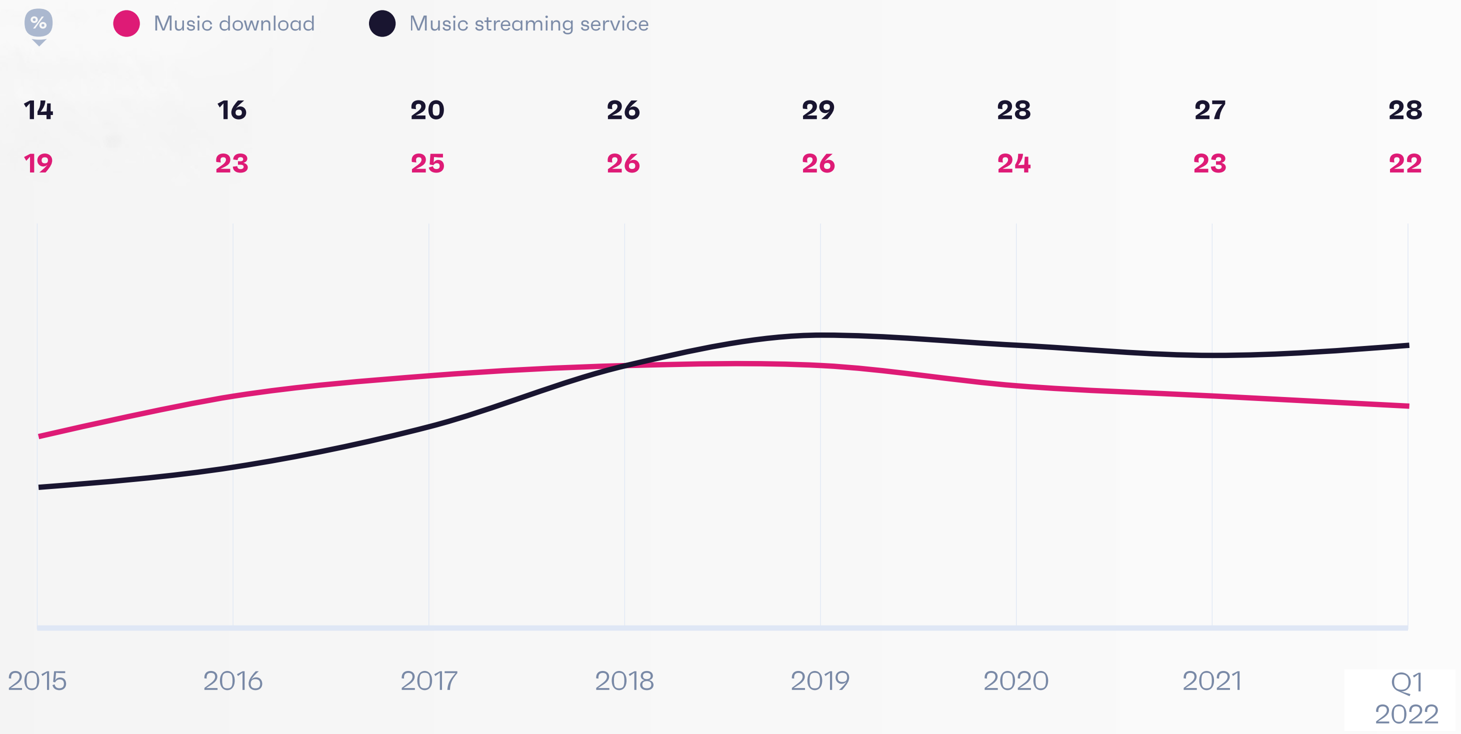
GWI Core Q1 2022

45,740 millennials who use streaming services aged 26-39

Music streaming has soared past downloads

% of millennials who have purchased the following in the last month

8



GWI Core Q1 2015 - Q1 2022 (Averages of respondents conducted by year) 1,336,648 millennials born between 1983 and 1996

Listen up: millennials & audio

Like online TV, music streaming has exploded among millennials in the past few years – with monthly subscription purchases growing 84% since 2015. They're not as effective in terms of brand discovery, with 14% saying they discover new products via music streaming services as of Q1 2022, putting them more or less on par with other forms of audio like radio (13%) and podcasts (13%). It's worth noting, however, that audio ads are among the fastest growing sources of brand discovery in our data – while long-time favorites, like TV ads, continue to slump.

Since Q3 2019, Spotify has cemented itself as the number one music streaming service for consumers outside of China. 45% of millennials use it, and it continues to attract new listeners wave-on-wave.

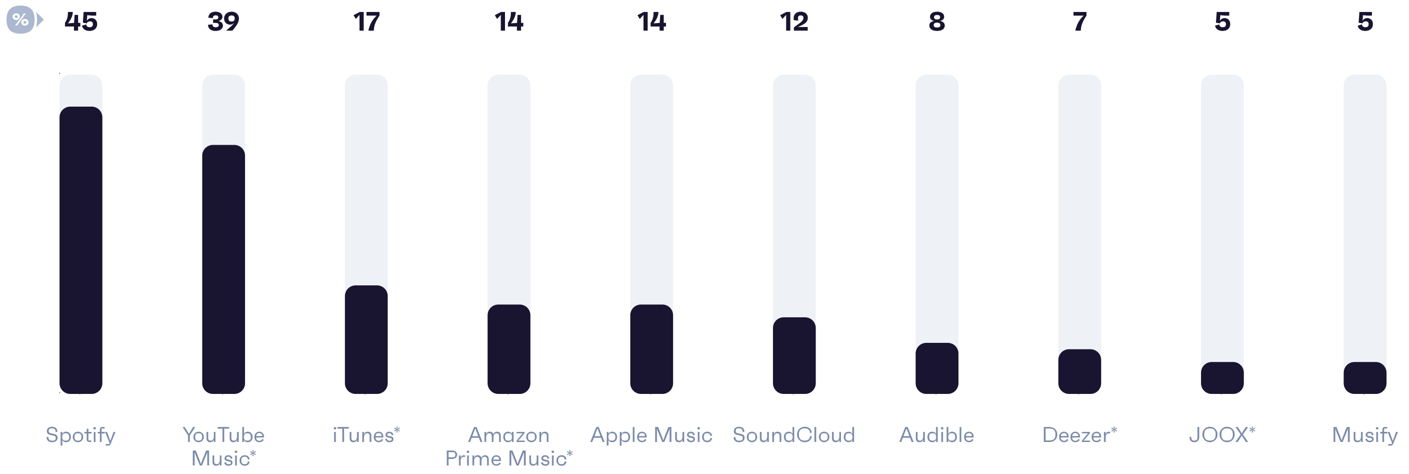
But YouTube Music is emerging too – growing 15% between Q3 2020 and Q1 2022 – creating a challenge for leading services, who need to find new ways of remaining competitive. Like TV, music streaming could benefit from leaning on other forms of audio: podcasts, radio, and even audiobooks, to form one harmonized audio platform. Spotify has made big moves in this space, most notably with the acquisition of the **Joe Rogan Experience** in 2020.

Over 1 in 5 millennials listen to podcasts every week. That's behind the number who listen to music streaming services (41%); but podcasts are growing – millennials now average an hour listening to them every day, so the potential this form of audio offers isn't to be ignored. Even radio is still very popular with millennials, who spend more time listening to it than baby boomers do.

Top 10 music streaming services

9

% of millennials, outside of China, who use the following services



*Select markets only

GWI Q1 2022 40,381 millennials who use music streaming services aged 26-39

Game on: what gaming means to millennials

Gaming is **(or perhaps always was)** incredibly popular. Among millennials, 86% play games on any device, just two percentage points behind Gen Z, whose greater interest in gaming means they're more often associated with the activity than millennials are.

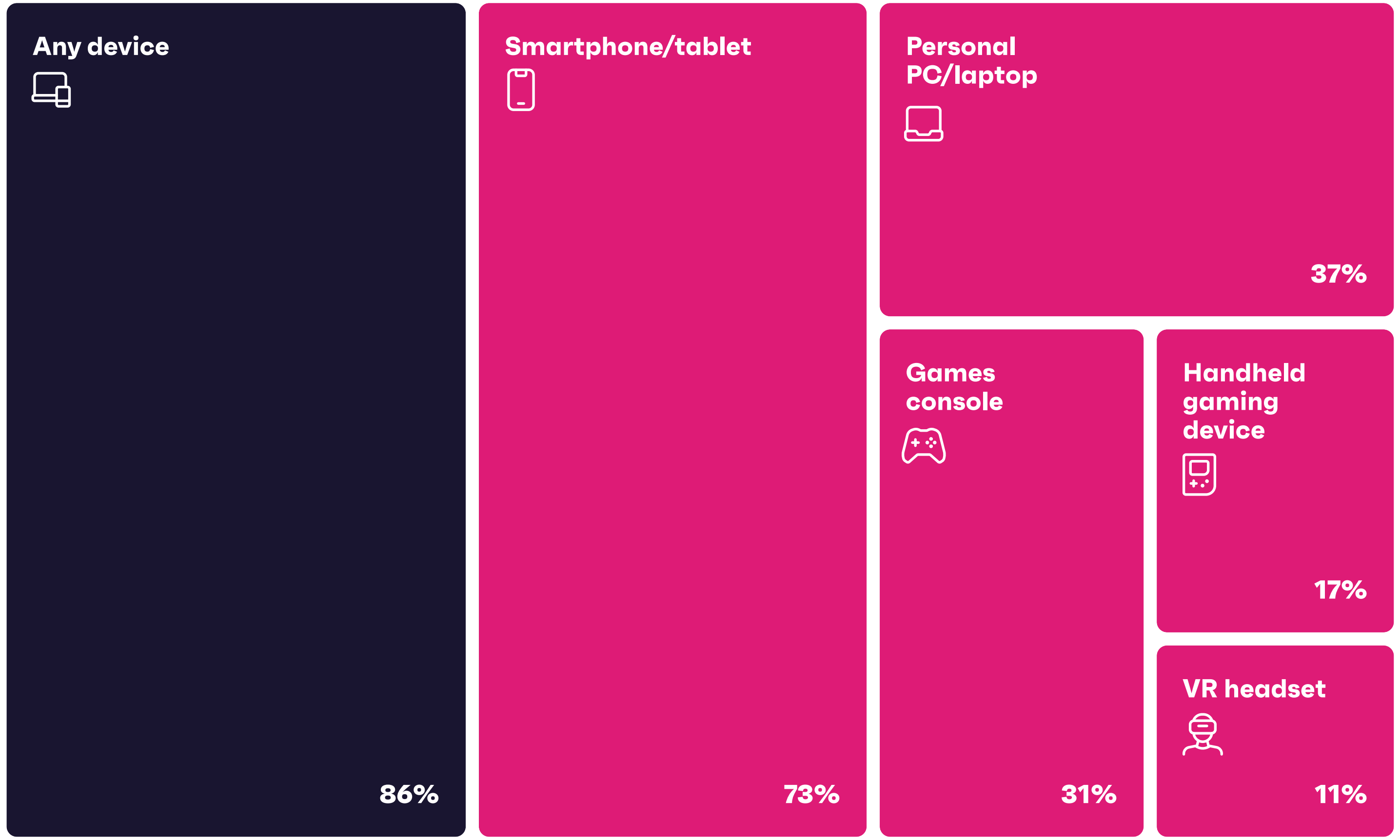
But make no mistake, millennials are big gamers. The youngest of this generation would have been around 10 years old when the original PlayStation was released, so they've grown up with some of the classics: *Crash Bandicoot, Halo, God of War, Ratchet & Clank*, all of which are still around today. Because consoles were a staple of living rooms throughout this time, it's little surprise that millennials are more likely to play or own a games console than any other generation.

Want more on different generations' attitudes to gaming? **Check out our infographic**

Devices used for gaming

10

% of millennials who play games on the following

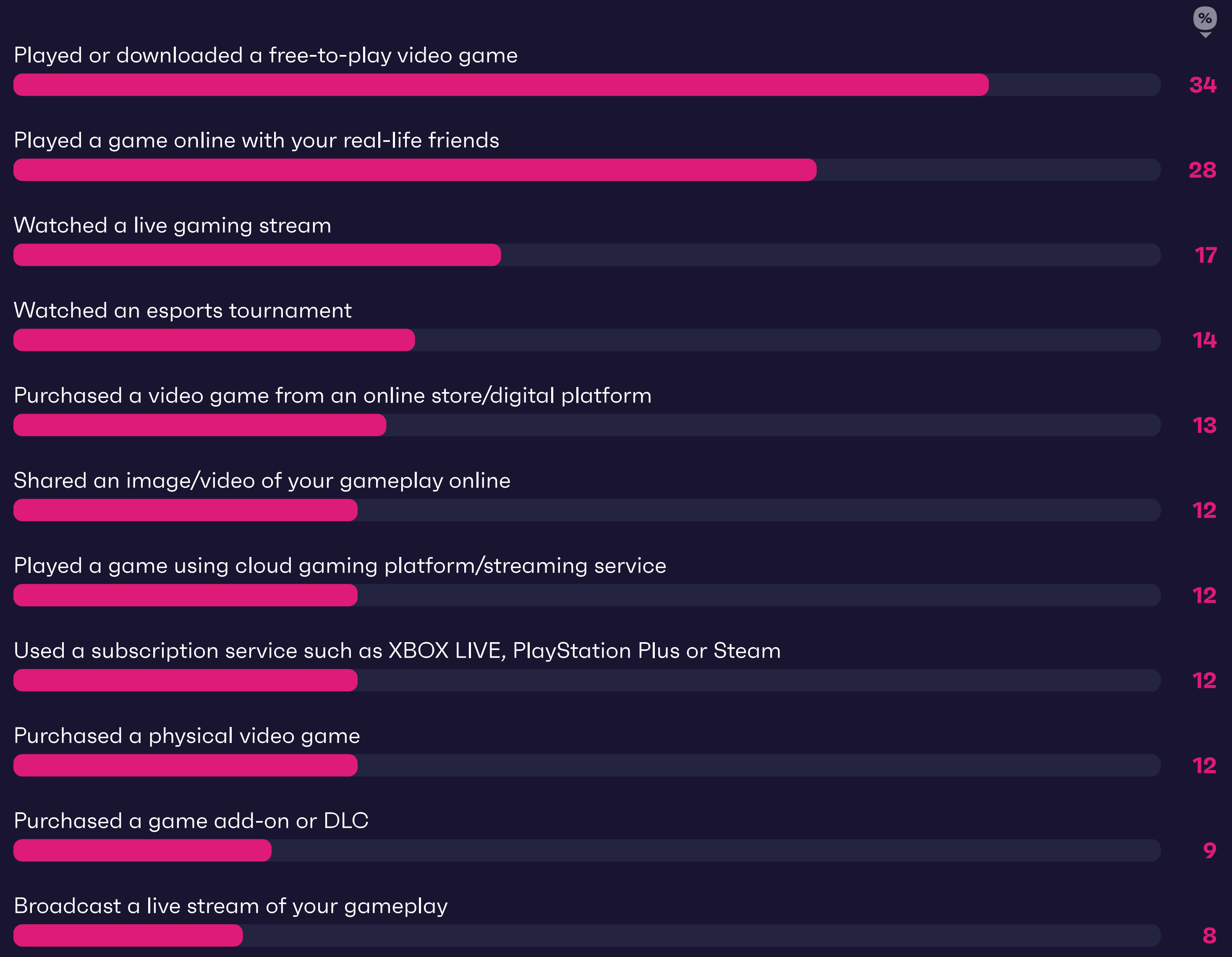


GWI Core Q1 2022 | 27,934 millennial gamers aged 26-39

Gaming behaviors have changed

% of millennial gamers who have done the following in the last month

11



GWI Core Q1 2022 27,934 millennial gamers aged 26-39

Millennial gamers are most likely to be broad-casting their own gameplay

But gaming is very different today. The shift from local multiplayer to joining massive online lobbies means millennial gamers have found new ways to play that they didn't know growing up. Even in the past few years, the way millennials play games has changed. In 2019, they stood out for being esports viewers, but as of Q1 2022 millennial gamers are most likely to be broadcasting their own gameplay instead. They're much more likely than the average gamer to use cloud gaming, which could suggest this generation has a nostalgic relationship with gaming. These services unlock old games from past consoles, not just for new audiences, but those who grew up playing them too.

Millennials are also 15% more likely than the average gamer to purchase in-game items – something that gives brands a way of enhancing millennials' status in games, or even in the metaverse.

How millennials see the metaverse

Despite spending less time online, and signs of increasing awareness regarding their relationship with tech, millennials are 20% more likely than the average to say they prefer their time spent online than in the real world. And as early pioneers of the internet, heavy gamers, and key users of things like music & TV streaming, who can blame them?

The **metaverse** might not technically exist just yet but building is well underway; several big-name brands are **working in this space**, and Meta has been anything but quiet about its **ambitions**. For those with a legitimate virtual life, this kind of product could be a huge game-changer, and it's got brands very interested to see what kind of activities people will enjoy in there.

Among millennials, interest is high (40% say they are). While this is behind Gen Zs (47%), it's easy to imagine them among the first adopters when the first 'true' metaverses arrive. There's some fairly subtle reasons for this, besides interest. Many play online games, over half of full-time workers now work remotely, and nearly 1 in 5 take online fitness classes every week. They had to adapt quickly to online environments in the pandemic, so a switch to the virtual world could come naturally to them.

And we already have some idea of what they expect to do in the metaverse. Entertainment-based activities like watching films/TV, playing games, or attending live events are top of the list, and a lot of these things already happen in games like *Fortnite*. But it's worth reminding brands to really think outside the box when it comes to opportunities here – rethinking the things people already do, but in a virtual setting.

On top of that, it's not going to be an online shop – or at least, that shouldn't be the only goal. Wagner James Au, a journalist who's been covering virtual spaces (*Second Life* in particular) since 2003, has made it clear that brands **shouldn't just build stores** in the metaverse. Our data tells us the same story, with browsing and shopping for products just some of the things millennials want to do.

Millennials have a lot of plans for the metaverse

12

% of millennials, interested in the metaverse, who would like to try the following when using it

	%
Watch TV/films	57
Play games	54
Browse products	51
Watch live events (e.g. concerts)	49
Shop for products	49
Meet up with friends/family	45
Meet new people	38
Do exercise/work out	38
Hold meetings (work, study, etc.)	34
Make investments	30
Just generally explore	26

GWI Zeitgeist March 2022

1,434 millennials, interested in the metaverse, aged 26-39

"...opening a store there isn't very exciting. And so you have tens of millions of dollars being spent on these headquarters and a dozen people walk around them, get bored, and leave.

WAGNER JAMES AU

JOURNALIST SPECIALIZING IN VIRTUAL ENVIRONMENTS

03

Social media

Who's using what?

Millennials are spending less time on social media today than they were in 2019. Usage was high (as it was for all generations) between Q1 and Q2 2020, but with lockdowns a distant memory in most countries, so too are the kinds of behaviors that came with this. Apart from the fact that people are less reliant on social media to remain connected, it's a potential sign of how much more social media services are competing with other forms of media.

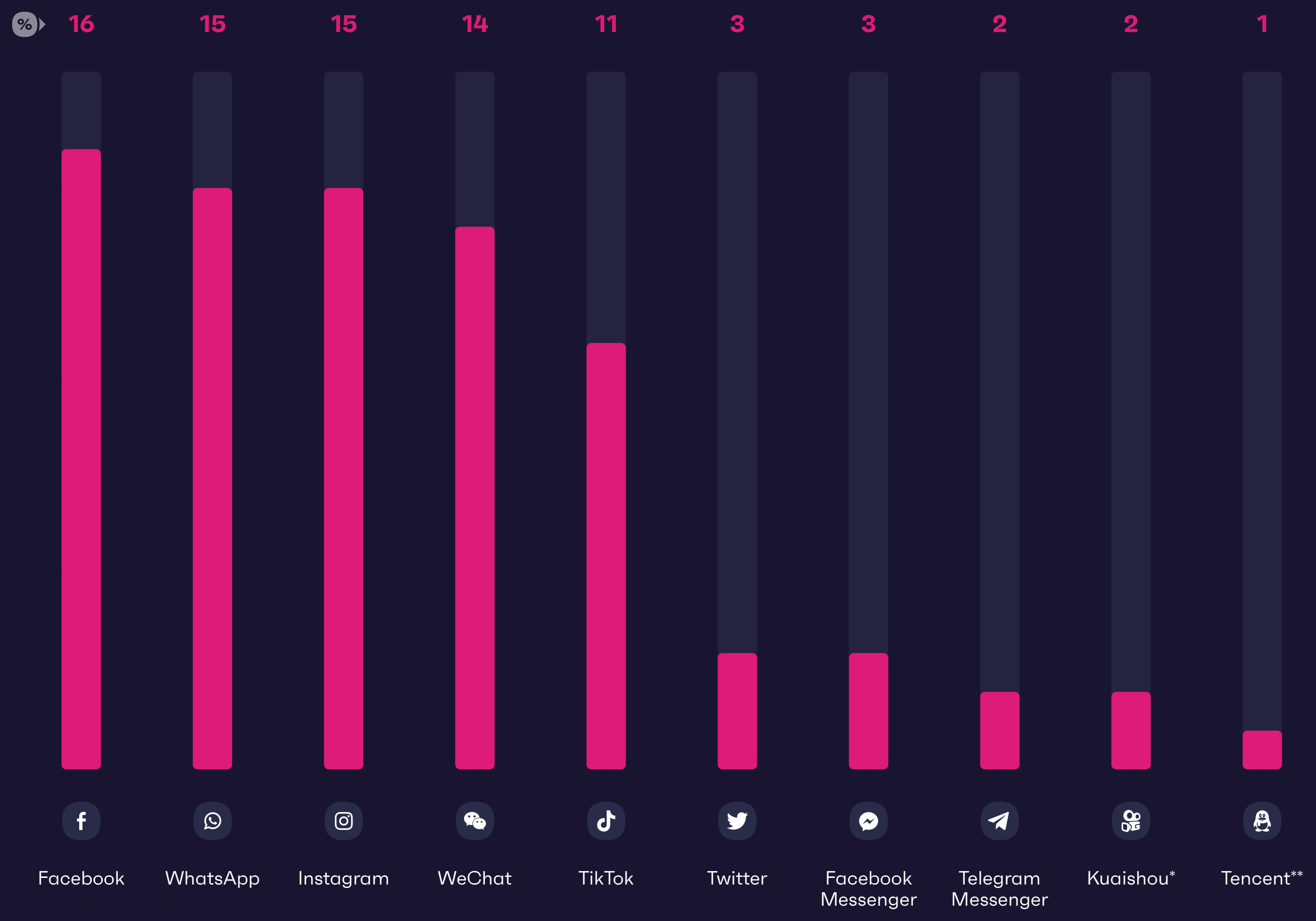
While Facebook is still the most popular service among millennials outside of China, usage has remained relatively stable since Q4 2020, with the number who say it's their favorite falling 5% at the same time. The hierarchy is changing and other services are making their way into millennials' good books.

Fighting for second most-used are Instagram and WhatsApp. Instagram has potentially seen sign-ups peak among millennials, but the number who say it's their favorite has actually grown 10%. But that's nothing compared to what TikTok has accomplished in such a short space of time; it may be **'the young person's app'** but make no mistake, millennials love it too. Between Q4 2020 and Q1 2022, the number of millennials who use TikTok has grown 30%, while the number who cite it as their favorite grew 51%.

The growth of TikTok has other platforms eyeing up ways to emulate its success, offering ways to compete for millennials' time. Mark Zuckerberg himself even **cited the ByteDance app** as one of the key reasons behind Meta's difficult quarter in early 2022, doubling down on video features in the near future.

Favorite social media platforms

% of millennial social media users who say the following is their favorite



*Select markets only

**China only

GWI Core Q1 2022 79,848 (worldwide) and 69,020 millennials (outside of China) who use social media aged 26-39

TikTok: a short-form success story

TikTok's extraordinary appeal hasn't gone unnoticed by rival services, with many taking inspiration from its distinct format to retain users – and TikTok is **doing the same in response**. The difference is how video is TikTok's core offering while other services use video, just not in the same way.

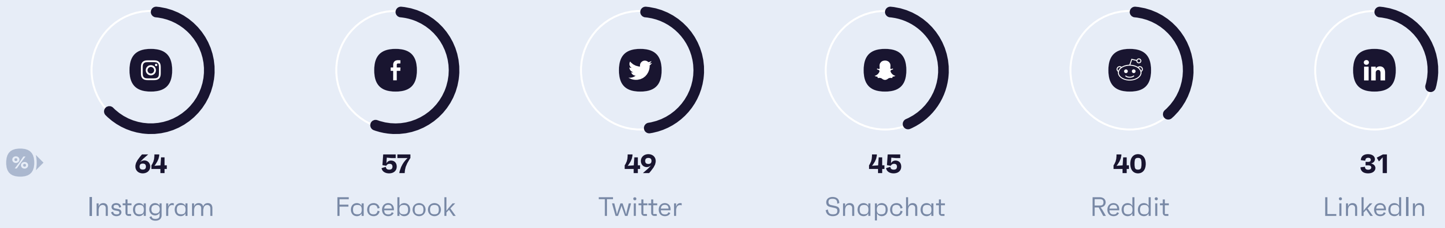
As TikTok becomes more popular with millennials, other social media platforms will need to keep rethinking their video offering. A look at the number of millennials across different social media services, who use them to watch videos, reveals the significant growth opportunity available here.

Almost as many millennials now use TikTok as they do to watch videos on Facebook, meaning if Facebook can bolster its video offering, then there's a chance of retaining more of its users. The case is similar for Instagram, where over two in three of its millennial users watch videos on the platform every month. Even a business networking tool like LinkedIn sees 3 in 10 of users watch videos, suggesting the opportunity to snatch new users through video is there for the taking.

How big is the growth opportunity for social video?

14

% of millennials, who use the following platforms, and watched videos on them in the last month



GWI Core Q1 2022

79,848 millennials who use social media. Among this cohort there were 60,014 (Facebook) • 54,672 (Instagram) • 32,911 (Twitter) • 22,272 (Snapchat) • 12,524 (Reddit) and 21,988 (LinkedIn) users aged 26-39

How they use social

There's a **different vibe for every platform** that brands need to nail down, and the varying reasons millennials have for using social offers new means of engaging with them in ways they might not expect.

There are clear favorites when it comes to accomplishing certain tasks on different platforms. Finding funny content, for example, is now TikTok-first, while Facebook keeps millennials updated and gives them a place to message friends/family.

But where they stand out is using social media as a work-related tool. Even though their most-used or favorite services don't necessarily reflect this, it's a potential sign that the actual platform isn't important, but how it's used – some have even found ways to turn TikTok into a successful **recruitment tool**. Since they were among some of the first to experience social media, they're bringing it with them as they make moves in the workplace. A quick look at our **Work dataset** shows this in more context, with millennials far more likely to use any social media platform at work than their older counterparts.

On the other hand, there's things they dislike about social media too. Misinformation, while the number one frustration for all generations, isn't what sets millennials apart from other age groups; it's actually how social makes them jealous of others, with the amount of content and how addictive it can be following close behind.

There's a lot for brands and platforms to take into account here. Millennials are body-conscious, but also status-oriented, meaning they're likely to compare themselves to people they see online. As more brands dial back their use of misleading images and shift to posting 'real' content, it could do away with some of this. But platforms also need to think about how millennials are aware of their time spent online, doubling down on measures that help them track sessions – something **TikTok introduced** recently.

What they want to do on social...

% of millennial social media users who use social for the following reasons (sorted by top over-index).

Reason	IDX	%
Work-related networking/research	1.10	26
Watching live streams	1.08	27
Seeing updates/content from your favorite brands	1.08	26
Posting about your life	1.07	24
Watching/following sports	1.07	25
Supporting/connecting with good causes	1.07	19
Finding products to purchase	1.05	29
Following celebrities or influencers	1.04	23
Making new contacts	1.04	25
Seeing what's trending/what's being talked about	1.03	31

IDX 1.00

GWI Core Q1 2022 & GWI Zeitgeist May 2022

79,848 millennials (Core) aged 26-39 and 2,791 millennials (Zeitgeist) who use social media, in 9 markets, aged 26-39

...and what they don't want to see

% of millennials who say the following are their biggest frustrations with social media (sorted by top over-index).

Frustration	IDX	%
Makes me jealous about other people	1.30	14
Amount of content is overwhelming	1.15	23
Not having a wide range of opinions / views	1.13	14
Too addictive / takes up too much of my time	1.11	32
Too many bots	1.10	27
Can't say what I want / not enough free speech	1.07	17
Abusive language / behavior	1.03	34
Too much advertising	1.03	39
Shallow / unrealistic self-representation	0.98	31
Misinformation	0.94	47

IDX 1.00

Want the full scoop on social media trends in 2022? **Download the ultimate report**

Like & subscribe: following behaviors

There's been talk about the **'death of the influencer'**. But is this fact or fiction? Influencer content and mis-leading accounts are often touted as a key reason behind rising mental health concerns among younger people. There's some truth to that. Our Zeitgeist survey from April 2022 asked consumers to detail what they had been doing more of to manage their mental **wellbeing** since the pandemic began. For millennials, it's spending less time on social media with 32% saying this.

But that doesn't mean millennials are losing interest in influencers – 1 in 4 follow these types of accounts, a 5% rise since Q4 2020. It could, however, be the case that influencer accounts are still popular because millennials are choosing to follow those who are more authentic, instead of ditching influencers entirely.

With this in mind, accounts that millennials love (fitness experts, companies, beauty experts, etc.) need to think more about the kind of content they post online. As our data shows, while millennials may not quit a platform due to misleading content, there's nothing stopping them from unfollowing accounts that make this mistake.

It's worth remembering also how millennials' work-related actions on social media come into play here. The makeup of social media users on different platforms is ever changing – and that's exactly **what's happening on LinkedIn** – but as millennials move into more senior roles, their social media behaviors will come with them, affecting the kind of work accounts they interact with too.

As millennials move into more senior roles, their social media behaviors will come with them

Most distinctive social media accounts

% of millennial social media users who follow these types of accounts (sorted by top over-index).

Account type	IDX	%
Fitness experts or organizations	1.14	20
Companies relevant to your work	1.12	23
Beauty experts	1.11	20
Restaurants, chefs or food personalities	1.10	29
Contacts relevant to your work	1.10	24
Companies and brands you purchase from	1.08	26
Companies and brands you're considering purchasing from	1.08	24
Gaming experts or gaming studios	1.07	20
Travel writers and companies	1.07	17
Events you're attending	1.07	16

IDX 1.00

GWI Core Q1 2022 79,848 millennials who use social media aged 26-39

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04 Marketing to millennials

The purchase journey mapped out

Brand discovery

% of millennials who discover new brands/products via the following (sorted by over-index).

	%	IDX
Updates on brands' social media pages	19	1.13
Ads/sponsored content on podcasts	13	1.10
Ads seen at the cinema	12	1.08
Ads on music-streaming services	14	1.08
Personalized purchase recommendations on websites	18	1.08

Online product research

% of millennials who say the following would most increase their likelihood of buying a product (sorted by over-index).

	%	IDX
Messaging/live chat services	18	1.11
Forums/message boards	18	1.10
Micro-blogs (e.g. Twitter)	18	1.10
Blogs on products/brands	21	1.07
Video sites	24	1.07

Online purchase drivers

% of millennials who look for more information about brands, products, or services via the following (sorted by over-index).

	%	IDX
Option to use "buy" button on a social network	14	1.13
Exclusive content or services	16	1.10
Entry into competitions	14	1.09
Live-chat box so you can speak to the company	15	1.08
Click & Collect delivery	16	1.07

Brand advocacy

% of millennials who say the following would most motivate them to advocate a brand online (sorted by over-index).

	%	IDX
When something enhances my online reputation/status	18	1.11
Access to exclusive content or services	21	1.09
The feeling of taking part/being involved	23	1.05
When something is relevant to my friends' interests	22	1.05
Having insider knowledge about the brand or its products	22	1.04

GWI Core Q1 2022 82,819 millennials aged 26-39

Perfecting the shopping experience

Like most consumers, millennials would typically rather buy products online than in-store. But when we think about online shopping, that often means services like Amazon or eBay, instead of Facebook or Instagram. For millennials, 29% use social media to find products to purchase, and these services are a key part of their purchase journey. It's a similar case for Gen Z, whose purchase journey is also centered around social media.

Millennials' most distinctive method of product discovery is via updates on brand's social media pages. Gen Z, however, are more influencer-oriented; well-known accounts or celebrities lead outright. While both generations still typically discover via popular searchengines or TV ads, these touchpoints have been slowly losing their effectiveness for some time. Moreover, the TV landscape is changing. Apps like TikTok and long-standing sites like YouTube mean TV watching is more fluid than ever, so discovering via social media doesn't quite mean what it used to.

45% of millennials say they're loyal to the brands they like

When it comes to research, social media is present again. This time through forums or micro-blogs like Twitter. Gen Z, again, respond better to more creative or image/video-based sources like vlogs, pinboards, or video sites, while millennials seemingly prefer researching through reading. But that doesn't mean you can't be creative; Discord fits the bill as a community forum, but **in a way that's accessible** for brands and shoppers alike. It's also good practice to squeeze in as much information as possible; 52% of millennials research products before buying them, more than Gen Z (48%). Brands who can nail a balance of informative, but creative, tone will sit well with this generation.

On the lookout for purchase drivers, millennials are 13% more likely to say having a "buy" button on social media would improve their likelihood of buying a product. Free delivery or access to discounts are still very popular, but millennials are less likely to cite either of these things than the average. They're swayed by convenience, and if they've already discovered and researched a product on social media, having the option to complete the purchase here is about as convenient as it gets.

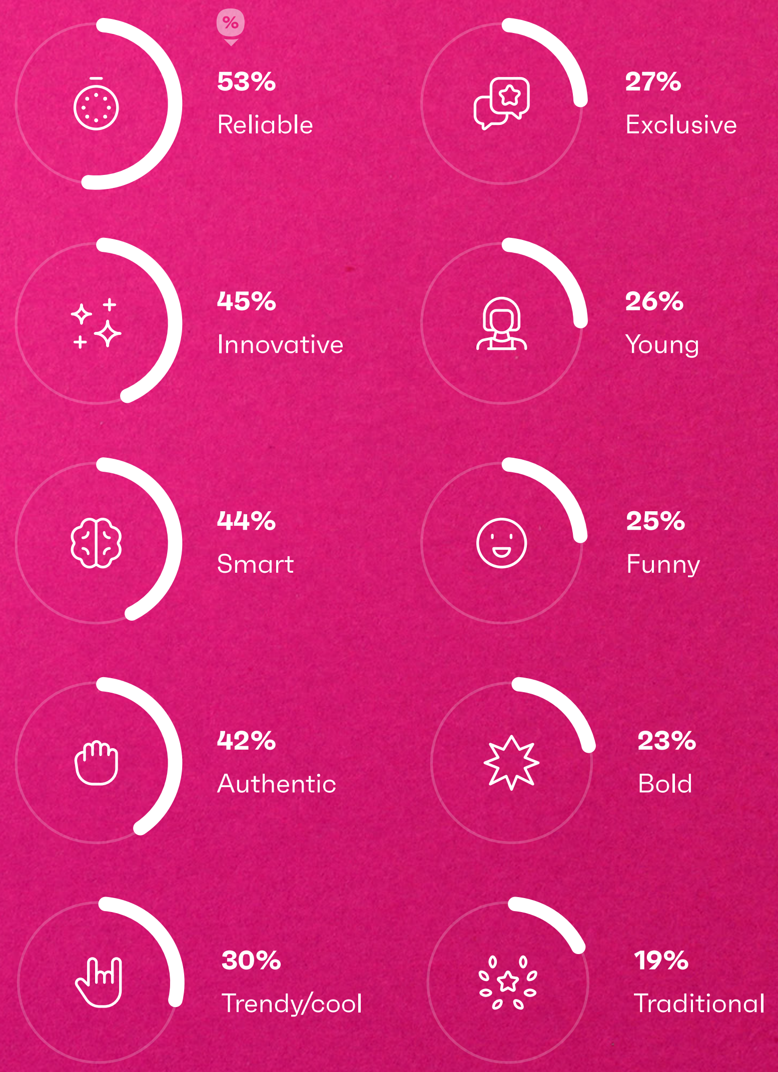
At this stage, brands may have already earned that all important follow on social media. If so, millennials are likely to come back again – 45% say they're loyal to the brands they like. But to improve chances of advocacy, brands need to think about status; things like insider knowledge or exclusive content – something that matters to Gen Z too. Improving their online reputation is a little harder. Right now there are some visible online status symbols brands can use: like a Reddit badge or a Facebook sticker. But think about how that might look down the line – perhaps in the form of an exclusive outfit to wear in the metaverse.

What do they want from brands?

Nothing matters more to a consumer than a brand that's reliable – all generations say this, and millennials are no different. It's a reminder for brands to secure suppliers they trust, and ensure quality control on the products they provide. This means offering support after a purchase too. Millennials are more likely than the average to cite a live-chat feature as a purchase driver, with 40% saying brands should listen to consumer feedback, so knowing they can get in touch after buying a product is important too.

Brand qualities

% of millennials who say they want brands to be...



GWI Q1 2022 82,819 millennials aged 26-39

This feeds into their desire for authentic brands too. It's just good practice for brands to be upfront about any hidden costs, data collection, or warranty at the time of purchase. What authenticity really means could depend on the brand also. Beauty brands, for example, will need to take on board what we said about millennials' attitudes to content they see on social media. Are the products being advertised without help from filters or Photoshop? Are the models authentic?

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Brand actions

% of millennials who say brands should...

GWI Core Q1 2022 82,819 millennials aged 26-39

Consumers don't have to swipe far to see what other customers are saying

After all, millennials' purchase journey is heavily tied to social, meaning they don't have to swipe far to see what other customers are saying, or any misleading content brands might have posted.

One of the biggest pitfalls brands can fall into here is greenwashing. Like reliability, eco-friendliness is at the top of nearly all consumers' lists, not to mention the fact that **sustainability is practically non-negotiable** at this stage. Brands who make eco-friendly claims or commitments, but don't keep to them, will almost certainly feel the repercussions.

If brands can nail down these two major qualities, then they can decide how best to align with the others. What's 'trendy' can change from person to person, and not all brands need to be funny to get in with their consumers.

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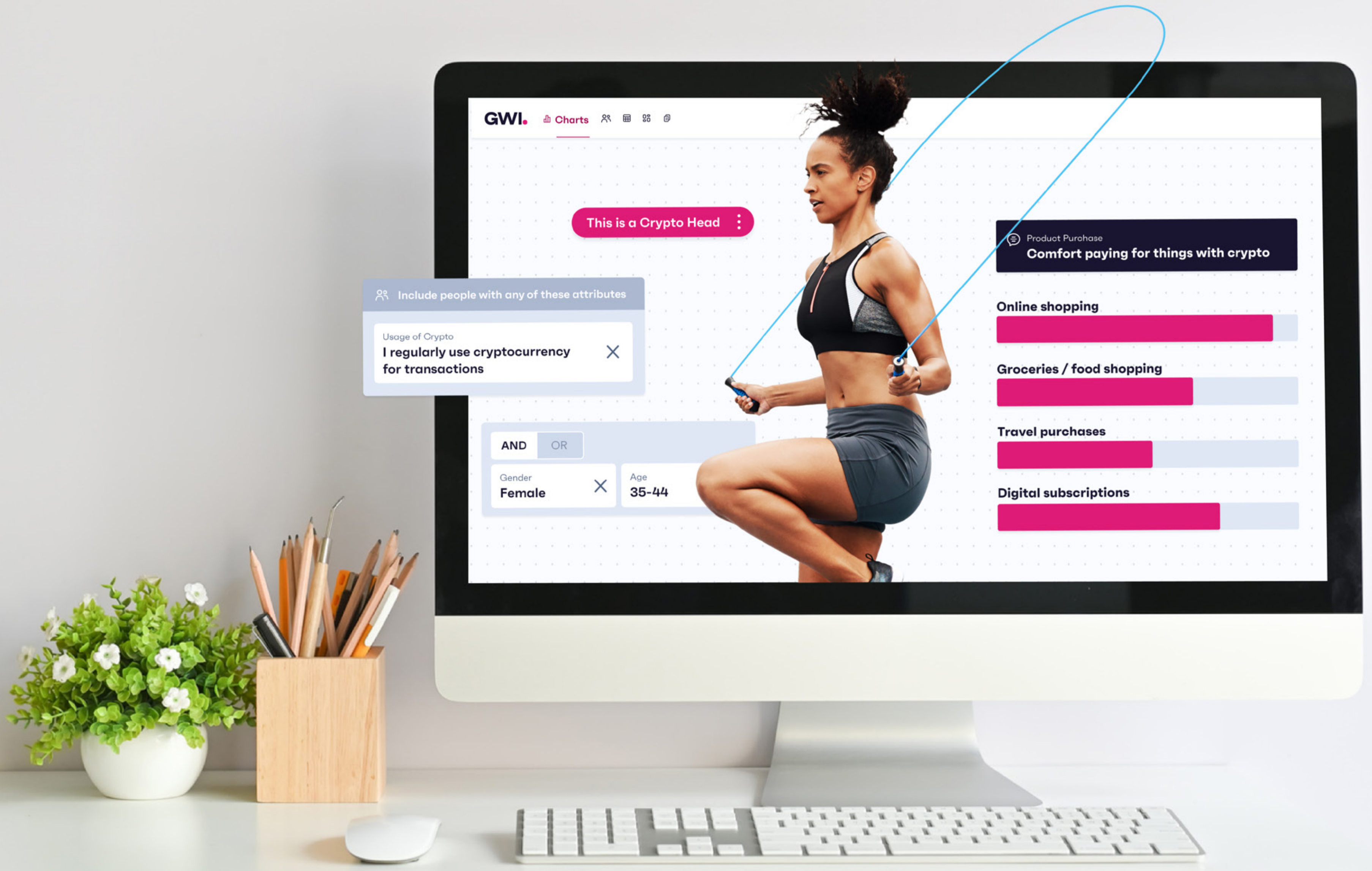

Appendix

1 What best describes the highest level of education you have achieved? • What best describes your marital status? • How many children do you have? • Who lives in your household? • This data is generated based on the household income question.

2 Do you personally, or does anyone in your household, currently have any of the following conditions? • In the next 6 months, how do you think the following will change? • Which of these things are you interested in?

3 Which of the following do you feel describes you? • Typically, which of the following would you rather do?

4 5 On an average day, how long do you spend on the following?)

6 In the last month, which of these have you paid for? (Movie or TV download • Movie or TV streaming service)

7 In the last month, which of these services have you used to watch/download TV shows, films or videos?

8 In the last month, which of these have you paid for? (Music download/Music streaming service)

9 In the last month, which of these services have you used to listen to/download music, radio or audiobook content?

10 11 Which of these devices do you use to play games? • Thinking about gaming, which of these things have you done?

12 Thinking about the metaverse, which of the following would you be interested in doing?

13 Which of these would you say is your favorite?

14 What have you done on the following in the last month? (Watched a video)

15 What are your main reasons for using social media? • What are your biggest frustrations about social media?

16 Which social media accounts do you follow or subscribe to?

17 How do you typically find out about new brands and products? • Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services? • When shopping online, which of these features would most increase your likelihood of buying a product? • What would most motivate you to promote your favorite brand online?

18 19 Which of these do you want brands to be? • Which of these things do you want brands to do?

Notes on methodology

Introduction

All figures in this report are drawn from GWI'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 700,000 internet users aged 16-64 across 48 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 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.

Millennial sample size by market

This report draws insights from GWI's Q1 2022 wave of research across 48 countries, with a global sample of 82,819 millennials.

Argentina	638
Australia	2,712
Austria	653
Belgium	592
Brazil	3,390
Canada	1,967
China	10,399
Colombia	1,425
Czech Republic	393
Denmark	440
Egypt	694
France	3,042
Germany	3,160
Ghana	406
Greece	365
Hong Kong	706
India	5,792
Indonesia	2,641
Ireland	500
Israel	524
Italy	2,893
Japan	3,007
Kenya	353
Malaysia	3,007
Mexico	2,026
Morocco	283
Netherlands	730
New Zealand	635
Nigeria	357
Philippines	1,477
Poland	1,164
Portugal	760
Romania	452
Russia	1,567
Saudi Arabia	816
Singapore	1,217
South Africa	715
South Korea	674
Spain	3,088
Sweden	767
Switzerland	445
Taiwan	844
Thailand	1,654
Turkey	777
UAE	1,089
UK	3,121
USA	8,498

Mobile survey respondents

From Q1 2017 on, GWI 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: GWI versus ITU figures

As GWI's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced right) 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 across GWI's markets

Because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe and North America to lows of around 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 in North America, much of Europe and places in APAC such as Japan and Australia.

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. In some Middle Eastern, African and Asian countries (e.g. India, Indonesia), we would also expect a gender-based skew towards males. Generally, younger internet users are more active and engaged with a lot of the behaviors and services tracked by GWI, which means % scores will typically be higher in low-to-medium-penetration markets.

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