Meet the millennials

Social media, entertainment, and purchase journey trends

GWI.

In this report

This report dives into the world of millennials (consumers aged 27-40), showcasing their attitudes, media habits, and how brands can engage with this generation.

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, or 16+. 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.

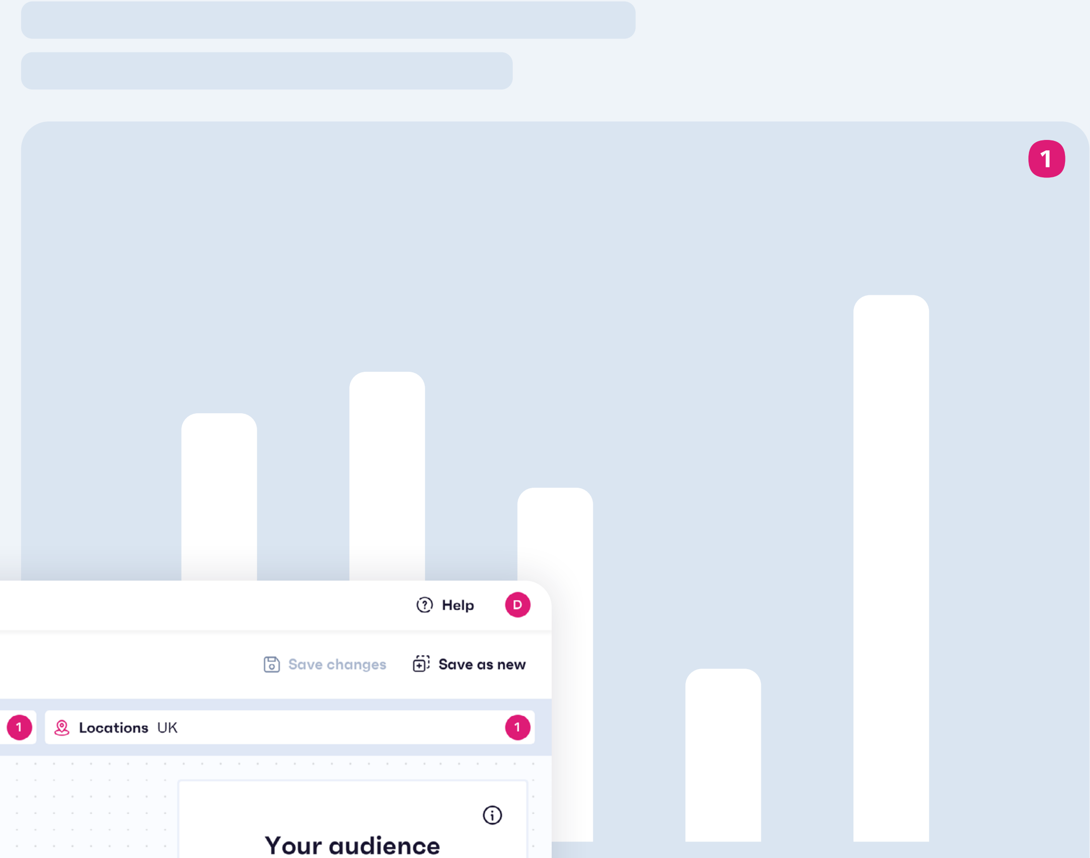
Each year, GWI interviews over 970,000 internet users aged 16-64 in 52 markets via an online questionnaire for our Core data set. A proportion of respondents complete a shorter version of this survey via mobile, hence the sample sizes presented in the charts throughout this report may differ as some 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 12 markets, and our GWI USA data set, 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.

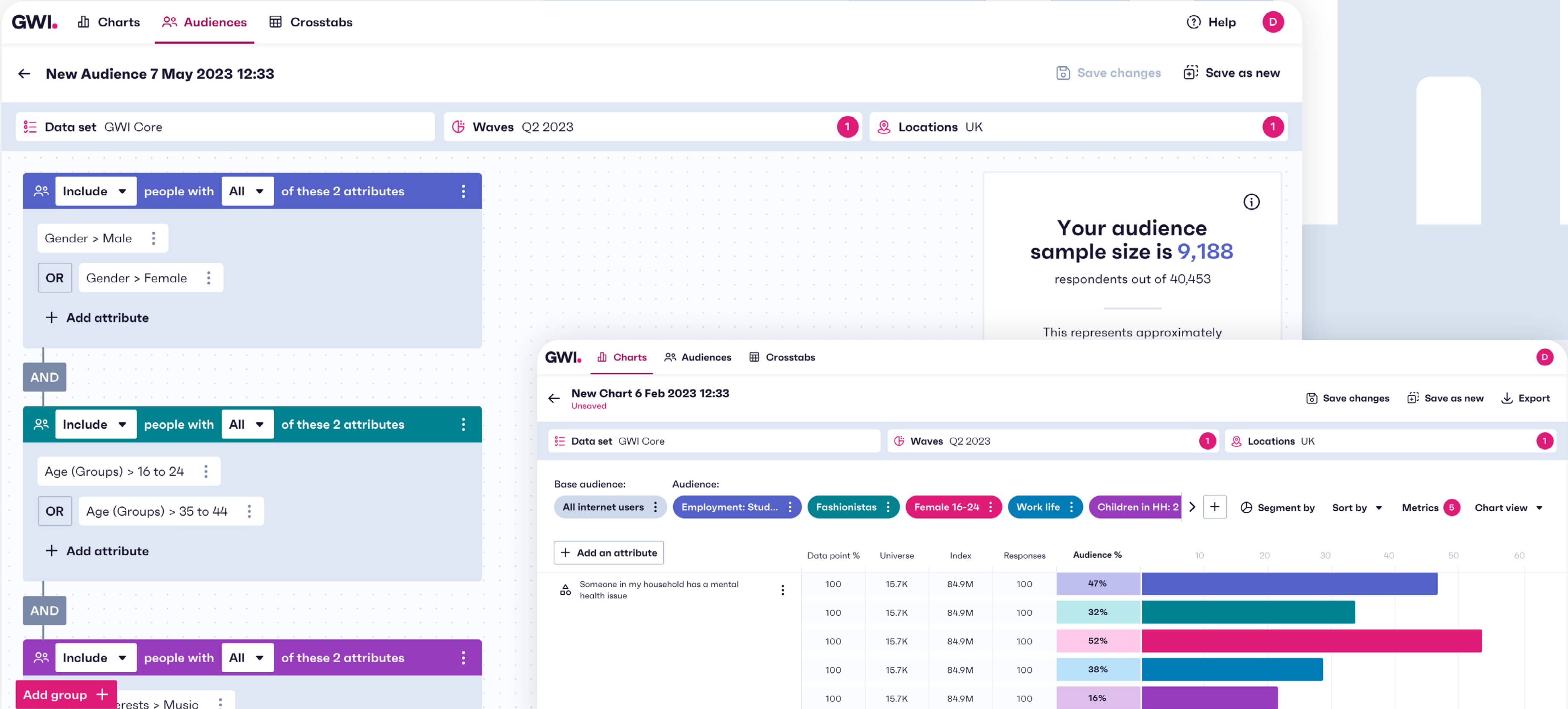
Discover the data on our platform

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.



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 Information about the source

Base and base

Key insights

Millennials have grown up

The pandemic changed millennials' priorities, and more have since started a family. The number of US millennials who say raising a family is important to them has risen by 13% since 2020. This generation are focusing on what matters – finding a better balance between their work and their personal lives.

Online time is falling

Millennials are spending 48 minutes less per day online compared to 2017. A lot has been going on, and they're feeling a bit overwhelmed and burnt out. In order to capture their attention online in this shorter window involves understanding why this change is happening, and finding their favorite online spots.

Nostalgia resonates with them

Over 60% of millennials watch screen adaptations and revivals of old media, with movies being a big hit. It's important to remember that it's not always about creating something new, but reminding this generation why they connected with your brand in the first place.

They've got a competitive side

Just as Gen Z are known for being social gamers, millennials' stand out most for competing online. The competitive edge drives their passion for esports, and explains their fondness for game streaming. These relatively young industries can create a lot of pitfalls for brands, so understanding how millennials engage with them is essential.

Reliability is king

The top quality millennials value in brands is reliability. During times of economic crisis, this is more important than ever as consumers want more bang for their buck. Getting the basics right counts for a lot, especially as brand loyalty and trust wavers.

01

The makeup of millennials

Catching up with millennials

Over the last 8 years, millennials have developed from budding youngsters into full blown adults, with the relationships and responsibilities that come with growing up. In 2015, millennials who had started a family were firmly in the minority. Now, aged 27-40, the number of this generation who are married and have/are expecting kids has more than doubled. They're now a big part of the workforce, too. Over three-quarters of millennials are in full-time employment, a 32% increase since 2015. But are they career driven?

The average millennial homeowner in the US has a household income of nearly $118,000 a year, a rise of over $12,000 since Q2 2020

Things change quickly, and we can't discount the pandemic as a big driving factor in shifting priorities. When we look at **GWI USA**, the number of US millennials who say that raising a family is important to them has increased by 13% since 2020. They're less likely than Gen Z to say that being successful is important to them, and more likely to value spending time with family. Work isn't the be-all and end-all for many, and in the US, millennials are 14% more likely than the average American to strive for a good work-life balance.

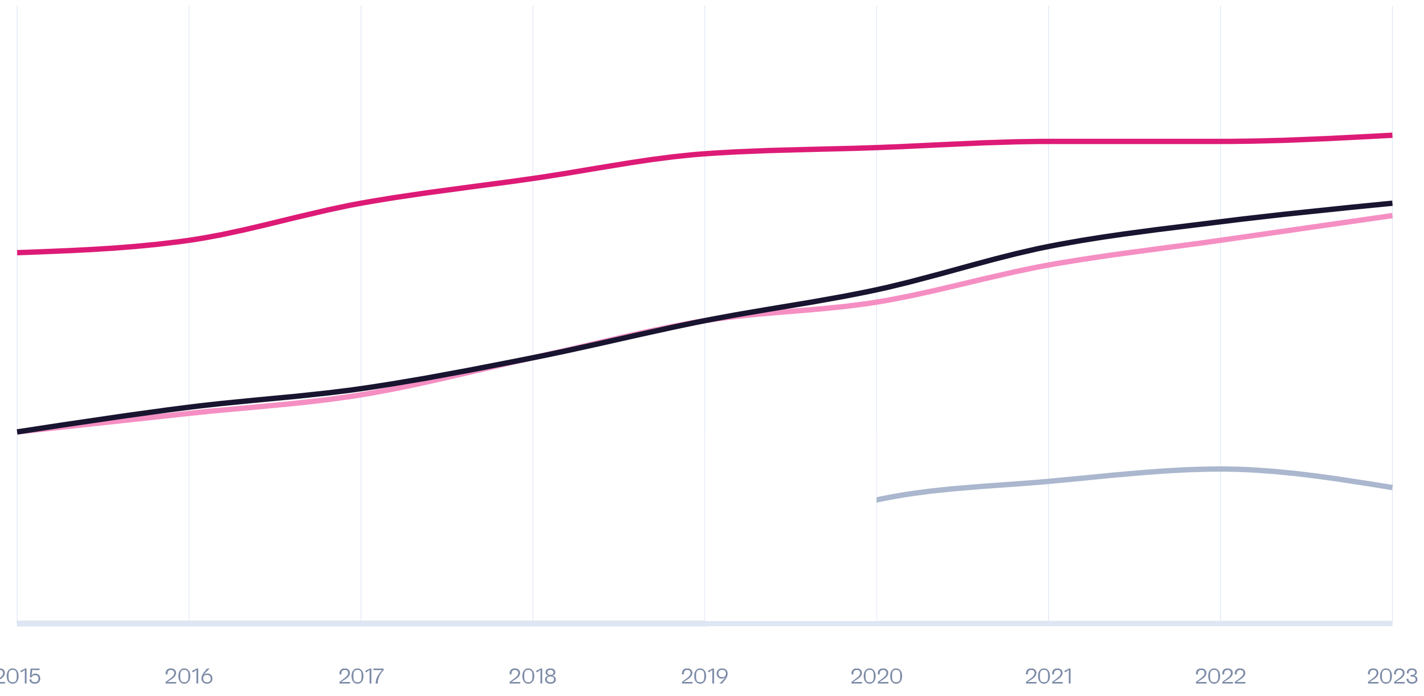
How millennials' lives have changed

1

% of millennials who are/have the following

% In full-time work or self-employed · Kids or are expecting · Married · In management roles*

	2015	2016	2017	2018	2019	2020	2021	2022	2023
In full-time work or self-employed	60	62	68	72	76	77	78	78	79
Kids or are expecting	31	35	38	43	49	54	61	65	68
Married	31	34	37	43	49	52	58	62	66
In management roles*	-	-	-	-	-	20	23	25	22



*added in Q3 2020

GWI Core Q1 2015-Q1 2023 (average of all waves conducted between Q1 2015-Q1 2023)
1,666,513 millennials born between 1983-1996

The differences between Gen Z and millennials

While Gen Z and millennials share similarities, they're not the same – take it from Gen Z, who are vocal about their **own identity**.

There's also a term for those on the cusp of Gen Z and millennials – **zillennials**. They're almost a class in their own right – associated with splashing out on luxuries and vacations, and propping up their income by living with their parents. And while they're becoming fairly established in the workplace, starting a family is also creeping onto their radar.

Millennials witnessed 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 they got to experience both the positives and the negatives that come with this. Both generations are more likely than average to say that using social media causes them anxiety, but Gen Z are feeling that pressure a little more. That's not to mention things like climate change or the cost of living, which play on their minds too.

We'll start with the things the two generations have in common. Millennials were shaped by economic downfalls, institutional crises, and huge technological advancements, meaning some of the **lifestyle choices, attitudes, and behaviors** attributed to millennials have essentially "passed onto" the next generation.

But ultimately, these are two different groups. A quick look at their distinct interests reveals esports and extreme sports as the only interests they have 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.

Despite similarities, Gen Z and millennials are unique

GWI Core Q1 2023

81,921 millennials aged 27-40 & 59,197 Gen Z aged 16-26

Get your copy

Gen Z in 2023
With crisis fatigue taking center stage, it's no wonder this generation is looking to bring back a more carefree, Y2K vibe.

Most distinctive interests of millennials and Gen Z, sorted by top over-index

Millennials (aged 27-40)	Gen Z (aged 16-26)
Esports	Esports
Adventure/ extreme sports	Gaming
Reality TV	Dance
Entrepreneurship	Photography
Gambling	Adventure/ extreme sport
Business	Urban/modern art
Cars/motoring	Fine art
Vegan food	Computers/coding
Investments	Playing sport
Celebrity news/ gossip	Fashion

Navigating the millennial economy

First the 2008 financial crisis, and now a cost of living crisis. Millennials haven't had it easy in an economic sense – and these events are taking their toll.

In 12 markets, just over a third of millennials say they've been looking for ways to cut the costs of their bills in the last year, and around a fifth say they've gone as far as finding a second job to help save money – the highest figure of any generation.

The UK has been particularly stung by economic events over the past few years, seeing a far **weaker relative recovery** from the pandemic. With a 19% YOY rise in UK millennials expecting their personal finances to get worse in the near future, they're clearly feeling the effects.

Another way to see this is by breaking millennials down by their home ownership status; those who own their home outright, those with a mortgage, and renters.

Pre-pandemic, financial confidence among these groups was fairly similar. Fast forward to Q1 2023, and the financial outlook among outright homeowners has now exceeded their pre-pandemic levels, while those with a mortgage has dropped 19%, and for renters, 22%. **Volatile interest rates** mean that it's harder than ever to get on the ladder, while those on it feel like their position has become more precarious.

Seeing as financial wellbeing will directly influence spending behavior, it's in brands' interests to understand the financial challenges they may face. As consumers' financial confidence has decreased, brands may need to adjust their value propositions in order to respond to a more cost-conscious mindset.

The slowdown lowdown
Who's spending and what's trending in the "bad vibes" economy.

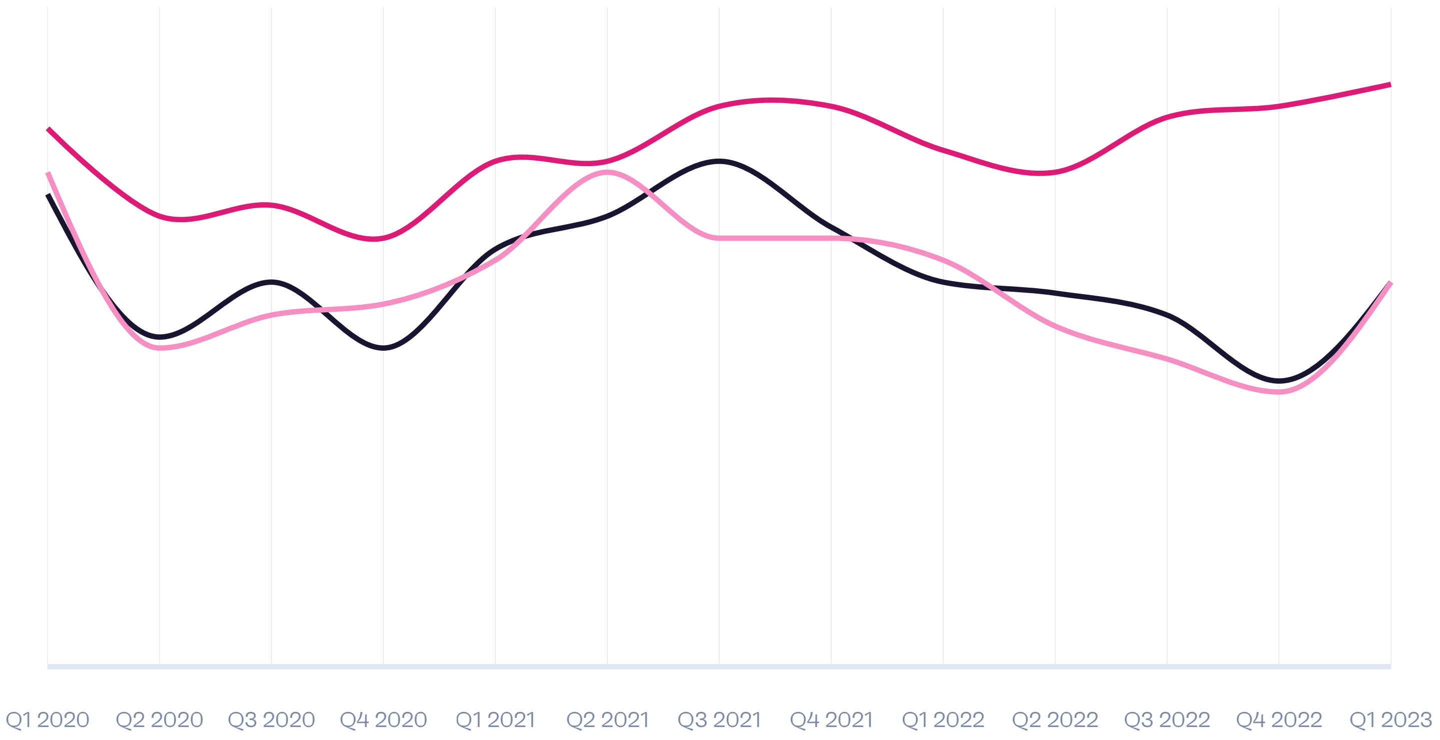
Step inside

The cost of living crisis has placed a burden on mortgage holders and renters

3

% of UK millennials in the following groups who say their personal finances will get better in the next 6 months

%	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Q1 2023
Own home outright	49	41	42	39	46	46	51	51	47	45	50	51	53
Own home with a mortgage	43	30	35	29	38	41	46	40	35	34	32	26	35
Rent their home	45	29	32	33	37	45	39	39	37	31	28	25	35



GWI Core Q1 2020-Q1 2023 10,396 outright home owners, 16,881 home owners with a mortgage & 14,324 renters in the UK born between 1983-1996

US spotlight

Building bridges to tomorrow's America

Millennials hold stronger views about social issues than the average American. Diversity, inclusion, and equal rights are more important to millennials than Gen X or baby boomers, and 1 in 4 think traditional gender roles are outdated.

Various movements over the years, from **#metoo** to the overturning of **Roe v. Wade**, have fueled support across a range of important social issues. Having grown up in the "size 0" era of the 90s and early 00s, body inclusivity is a standout issue, as many millennials don't want to see unrealistic expectations return alongside **retro trends**. And as they raise families of their own, they'll want to help set new standards for diversity and equality, which will shape **Gen Alpha**.

The old saying "actions speak louder than words" holds a lot of truth for them. Over half of US millennials say Americans have a responsibility to protest if they feel something is unjust. While most choose to educate themselves about the issues at play, millennials are 64% more likely than average to have attended a protest in the last 6 months.

Understanding the views of millennial Americans on social issues allows brands to effectively engage with this influential demographic, differentiating themselves from competitors and driving a meaningful social impact. The word "values" is frequently mentioned when discussing how brands can win over consumers, and with millennials, it's even more crucial.

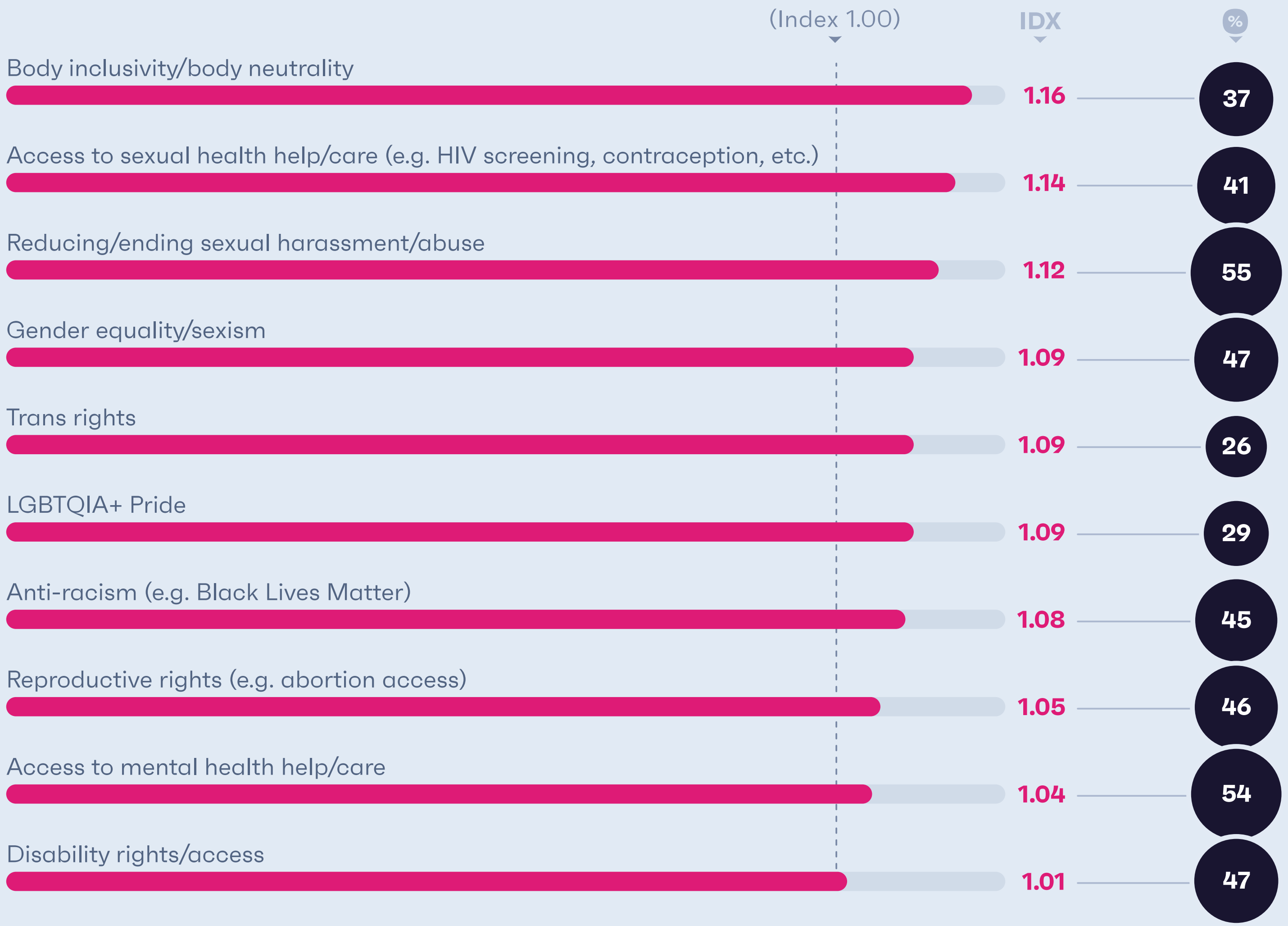
2/3

of US millennials would boycott a brand or company for homophobic, racist, or transphobic behavior

Which social issues stand out most for US millennials?

4

% of US millennials who say the following issues/movements are important to them, sorted by top over-index

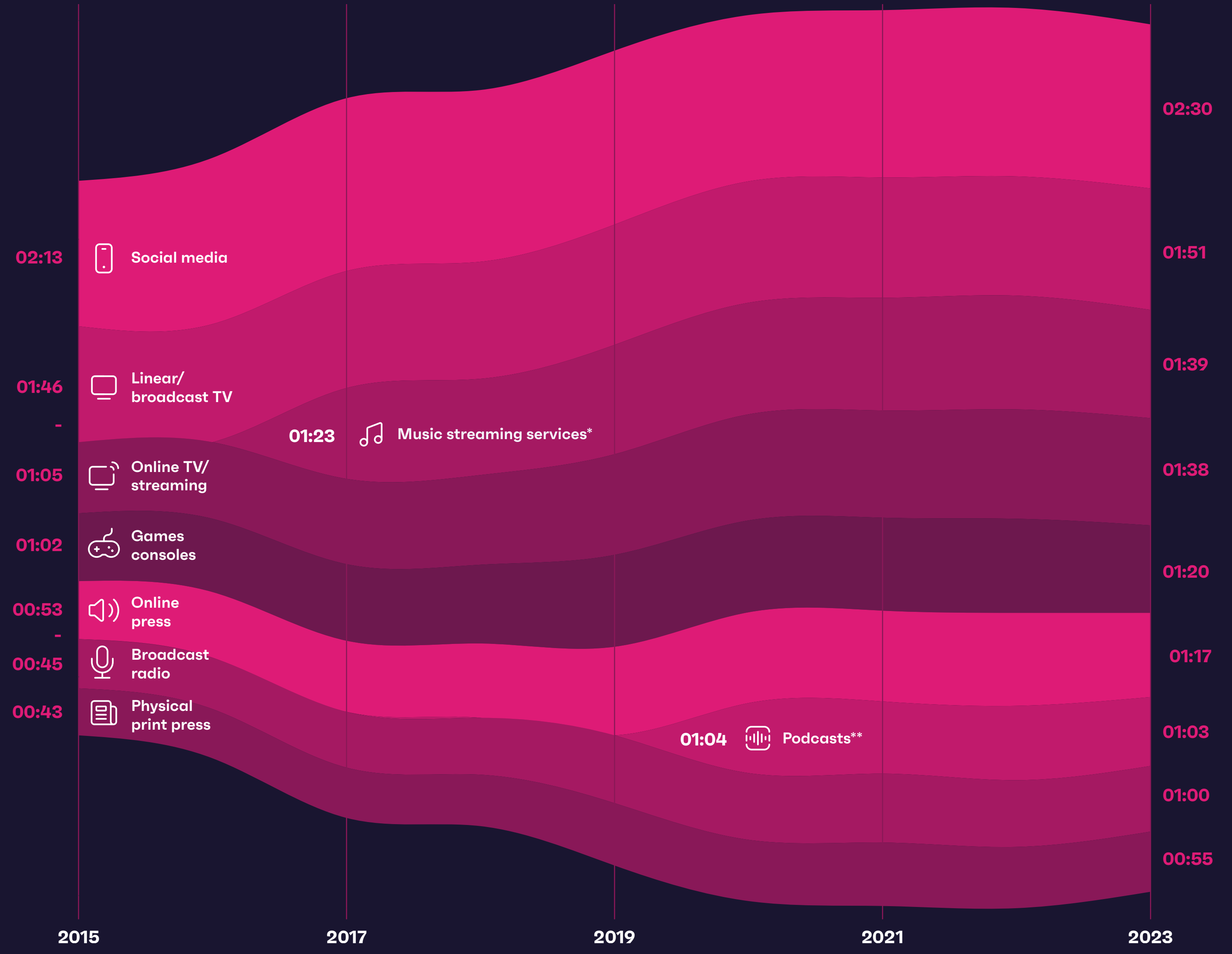


GWI USA Plus Q1 2023 741 American millennials aged 27-40

02 Entertainment & media

The millennial media landscape

Average daily time spent on the following (hh:mm)



GWI Core Q1 2015-Q1 2023 (average of all waves conducted between Q1 2015-Q1 2023)

1,666,513 millennials born between 1983-1996

*added in Q1 2017 | **added in Q1 2020

Pressing pause on information overload

Millennials were some of the earliest adopters of social media, so it's not surprising that they spend the majority of their online time on these platforms. As of Q1 2023, millennials spend 2h 30 mins on social media daily – 17 minutes more per day than they did in 2015. That's 39 minutes more than broadcast TV, the next highest media channel.

Social media is the first port of call for many millennials when it comes to getting their news and entertainment. But with so much information and platforms to engage with, are they getting burned out?

Today, millennials' daily online time is actually lower than it was in 2015. Compare it to millennials' 2017 peak, and they're spending 48 minutes less per day online. It's a sign of a change in lifestyle, but also that millennials are taking a break from the digital world.

There's increasing competition for millennials' attention, at a time where their priorities are moving offline. Post-pandemic, they're focusing more on **real-world goals**. When comparing their lives now to 2019, 77% of millennials say they're more conscious about their health and wellbeing, and 61% are more likely to be seeking out new hobbies.

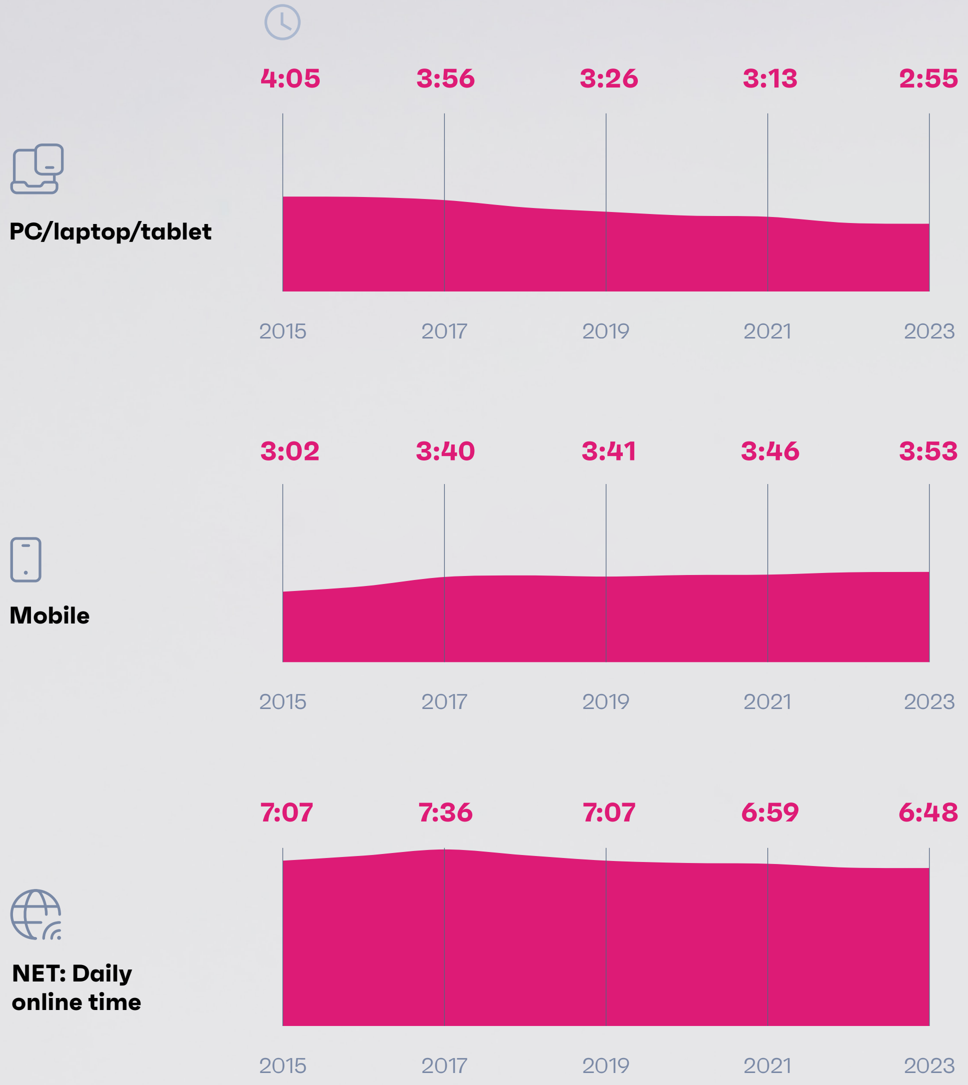
Brands should recognize the motivations behind millennials' break from digital platforms, by doubling down on their desire for balance and wellness. This will involve promoting self-care and fostering genuine connections. Ultimately, it's possible that the modern "network effect" of platforms today (where the value of something comes from the people using it) is more about having a common talking point in real life, and many are being used as inspiration for offline activities like reading. With more millennials raising families and climbing the corporate ladder, it's unlikely we'll see a U-turn anytime soon.

Time spent online has long passed its peak

GWI Core Q1 2015-Q1 2023 (average of all waves conducted between Q1 2015-Q1 2023)

1,666,513 millennials born between 1983-1996

Average daily time spent online on the following (h:mm)



Like two peas in a pod(cast)

Podcasting is a booming industry – it's estimated that, by next year, it'll be worth **$4 billion**. Millennials are spearheading this growth, as the generation who spend the most daily time listening to podcasts.

In fact, they're 16% more likely than the average consumer to say they spend at least two hours a day listening to podcasts. Not only are they spending more time listening than everyone else, they're also the most engaged, with millennial podcast listeners being the most likely to discover brands while tuned in.

When it comes to the genres that pique their interest, comedy, music, and TV & film are top of the list, but millennials' most distinctive podcast genres are parents and family, gaming, and technology.

This provides an interesting insight into the millennial parent – painting them as on-the-move multitaskers. Our 2021 research showed that 22% of millennial workers report listening to podcasts while commuting, higher than Gen X (17%) and Gen Z (16%).

Podcasts often feature hosts or experts discussing topics in a conversational and authentic manner, which helps build trust with listeners. Due to the range of hosts and topics, brands have the opportunity to target a niche segment of engaged listeners, who identify with the brand values and target audience interests. For brands selling baby products, gaming, or tech, they could provide a unique way to get your brand noticed.

11%

of millennials say they find out about new brands or products through podcast ads

Millennials' relationship with podcasts is strong

GWI Core Q1 2023

241,138 internet users aged 16-64

7

Average daily time spent listening to podcasts (h:mm), and the % in each group who listen to them

	Time (h:mm)	%
Gen Z	0:59	29
Millennials	1:02	36
Gen X	0:46	30
Baby boomers	0:31	5

Comedy and music genres top millennials' podcast interests

GWI Core Q1 2023

81,921 millennials aged 27-40

% of millennials who listen to the following genres of podcasts

Rewind: the power of nostalgia

Nostalgia is a huge trend in the media space right now, with remakes and remasters of popular films smashing **box office records**, allowing millennials to relive their childhoods as many seek a return to simpler times. And with feelings of digital burnout and information overload, who can blame them?

These trends are coming full circle in both entertainment and fashion. Gen Z are ditching smartphones for **dumb phones**, and the Y2K trend is back on the scene, as consumers swap skinny jeans for baggy ones. But how **nostalgic are millennials**, and what are they nostalgic about?

Movies, music, and TV shows trigger nostalgia the most. It's why various movie remakes are landing, such as Disney's revivals of **The Lion King**, **The Little Mermaid**, and **Beauty and the Beast** – just to name a few. The **music** and **gaming** industries are also jumping on the nostalgia train.

Whatever the media type, there's a success story **driven by millennials**. This could be a sign they're reflecting back on the good times, especially as **crisis fatigue** sets in. Brands therefore don't always need to release a new product line. There are easy wins to be had, especially if you've got strong legacy products or services.

59% of millennials like it when they see brands or companies use old ads or logos. Considering how much brands spend on advertising, it's likely there are opportunities to lean into the past, like McDonald's recently did when it dusted off its **classic Grimace mascot**, to **massive success**. To stay in the mind of millennials, you don't need to reinvent the wheel; you can also tap into what made them connect with your brand in the first place.

> “[Nostalgia is] a twinge in your heart, far more powerful than memory alone
>
> **DON DRAPER,**
> Mad Men (2007)

59% of millennials like it when they see brands or companies use old ads or logos

Millennials are most likely to be nostalgic for the 90s

Movies and music drive nostalgia, but video games stand out most

8

% of millennials who feel nostalgic about the following types of media

	Movies	Music	TV shows	Photographs	Video games	Books/ magazines	Advertisements	Radio
%	34	29	29	22	20	18	10	9
IDX	1.04	0.99	1.05	1.01	1.20	1.07	1.09	1.08

The past is still present in millennials' minds

% of millennials who agree with the following statements

Statement	%
I enjoy screen adaptations of past media (i.e. when a book/video game is adapted to become a TV series/movie)	63
I enjoy revivals of past media (i.e. a revival of a past TV show to present times)	61
There are too many "unoriginal" TV/movies (i.e. remakes, sequels)	59
I like it when I see brands/companies use their past logos/advertisements	59

GWI Zeitgeist January 2023 5,241 millennials aged 27-40 in 12 markets

The competitive edge: esports and streaming

Millennials are avid gamers. They spend an average of 1h 20 mins a day on games consoles, just as much time as Gen Z. But what makes them different is how, and why, they're gaming. Gen Z are the most likely generation to say they game to socialize with their friends or to escape from reality, but millennials stand out for wanting to compete online. The same goes for esports. Gen Z are more interested in it overall, but millennials are 31% more likely than the average gamer to be extremely interested.

Esports is a young industry, but millennials have seen it flourish. Competition winnings once were a drop in the ocean compared to traditional sports, but first place finishes now make **millionaires of top gamers**.

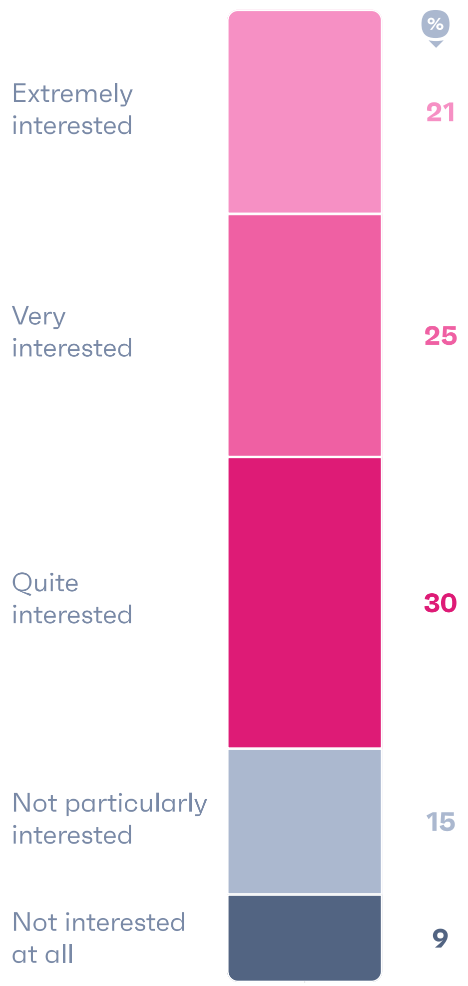
As a result, millennials' connection to esports is deep rooted. They're the most likely generation to engage in this space on a daily basis, and buy merchandise. And they're not slowing down either. The number of millennials playing League of Legends, by many metrics the world's **top esport**, has increased by 15% year-on-year.

Esports, of course, goes hand-in-hand with streaming. The growth of esports in the 2010s aligned with the **growth of Twitch**. Millennials are the most likely generation to stream themselves playing games, and to blog or vlog about the games they play. They also actively seek to insert themselves into the online gaming conversation.

Top gaming content creators like PewDiePie, Markiplier, and DanTDM are all millennials. They've grown through the inception of online gaming, and the following **golden era** of games. Games like Call of Duty and Minecraft gave birth to a new genre of online content, and with it, creators' careers. Millennials are at the forefront of creation in this sector, despite content also being largely consumed by their younger counterparts.

Esports interest is strong among millennial gamers

% of millennial gamers who are interested/uninterested in esports



Millennials are the most likely generation to livestream and vlog about games

9

% of millennial gamers who do the following

GWI Gaming Q4 2022 10,080 millennial gamers aged 26-39

Trend in action

Gen Y & AI

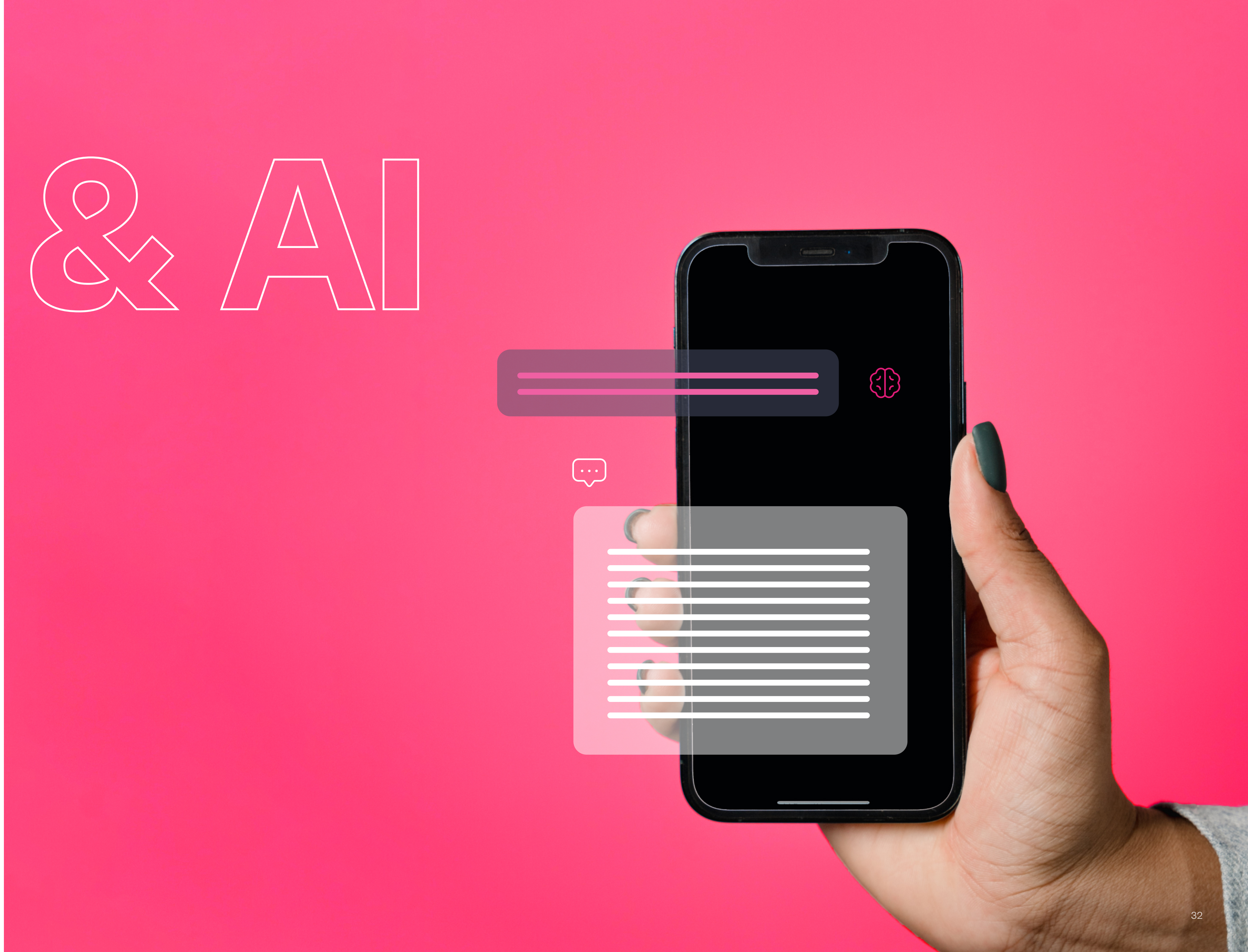
The trend on everyone's mind right now is AI. There have been many recent controversies around AI-generated art, with **musicians**, **writers**, and **illustrators** being some of the most-affected. But the millennial (Generation Y) perspective on this issue is more liberal than average. They're the most likely generation to be interested in seeing AI music, TV, and film, and are over 10% more likely than average to believe that AI tools should be able to imitate human art/music without legal concerns.

When it comes to using the tools themselves, millennials are the most likely generation to be very interested in using ChatGPT, and among those who use it, the most likely to find it very helpful.

In the workplace, many millennials see AI as an ally, rather than a threat. Millennials are 10% less likely than average to say that AI will put jobs at risk, and are 12% more likely than average to believe it'll allow employees to save time on tasks.

This doesn't mean they're not cautious, though. Millennial ChatGPT users are 47% more likely than Gen Z to think the tool isn't reliable when used consistently, and are the most likely generation to support the kind of government intervention that the **EU** is looking to implement. Gen Z have jumped head-first into using AI, being the most likely generation to use it daily in the workplace, but millennials are comparatively slower to lean in.

Millennials will be at the forefront of AI innovations, as they're very open to what the technology has to offer, but they'd rather look before they leap.



Millennials are buying in to AI...

% of millennial ChatGPT users who agree with the following statements

	%	IDX
I would consistently use ChatGPT over a search engine to help answer questions	78	1.14
I found myself chatting to ChatGPT like I would be to a live person (i.e. typing please and thank you)	74	1.17
I would pay for a premium version of ChatGPT	65	1.37
I'm concerned that ChatGPT is a biased tool	58	1.28
I could not tell the difference between a ChatGPT response and a human response	56	1.13
I don't think ChatGPT is a reliable tool that I can use consistently	54	1.24

GWI Zeitgeist February 2023 551 millennial ChatGPT users aged 27-40 in 11 markets

...but they aren't without their concerns

% of millennials who agree with the following statements

	%	IDX
Companies that create AI tools need to be transparent about how they are being developed	66	1.00
I'm comfortable using an AI integrated tool to buy a product/service	51	1.09
I trust AI tools to provide unbiased information/facts about a topic	49	1.11
I'm comfortable seeing ads when using AI tools	44	1.10

GWI Zeitgeist April 2023 4,996 millennials aged 27-40 in 12 markets

03

Social media

Who's using what?

Millennials grew up using Facebook, and the platform has been a resilient part of their social media footprint since then. Unlike Gen Z, who use Instagram more, Facebook remains their most-used app, and also their favorite. Though, TikTok has captured more of their time in recent years.

TikTok has spearheaded the short-form content boom. The platform's creation and editing tools have made it even easier than ever to participate in viral trends – something millennials are 10% more likely than the average user to do. Still, Facebook remains comfortably ahead of TikTok when it comes to playing favorites – but **time will tell** if it can stay in the lead for everyday use.

We can get an interesting look at how things might change down the line by looking at how younger and older millennials' favorite platforms compare. Those aged 27-33 prefer Instagram the most, while for 34-40s, it's WhatsApp. It's clear life stage has a part to play, which provides a staunch reminder that brands can't treat all millennials in the same way, even on social.

And for businesses, it's not just about what platforms each group's using, but also how well they adapt to each one.

Top 10 social media services for millennials

Ranked order of the top social media platforms, based on the % of millennials who use the following at least monthly, and the % change in users since Q1 2021

Rank	Platform	% change since Q1 2021
1	Facebook	-5▼
2	Instagram	-4▼
3	WhatsApp	+1▲
4	Facebook Messenger	-8▼
5	TikTok	+16▲
6	Twitter	-8▼
7	Telegram Messenger	+3▲
8	Snapchat	-2▼
9	Pinterest	-15▼
10	LinkedIn	-9▼

GWI Core Q1 2021 & Q1 2023

435,584 millennials & 68,977 millennial social media users outside China aged 27-40

Favorite social media platforms for millennials

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

The millennial social vibe map

What vibe millennials want on each social platform

GWI Zeitgeist April 2023
3,937 millennials aged 27-40 in 11 markets

% of millennial platform users who would like to see the following types of content on each app

%	Facebook	Instagram	Discord	LinkedIn	Reddit	Snapchat	TikTok	Twitter	YouTube
😂 Funny	43	49	34	15	34	42	58	33	51
ℹ️ Informative	40	41	40	60	56	30	34	51	51
💡 Creative	37	44	35	32	39	39	46	32	46
🧘 Relaxing	34	36	29	18	22	37	39	26	41
👀 Engaging	33	35	38	29	39	33	33	33	39
✅ Relevant	33	32	34	39	44	27	26	35	36
🎉 Exciting	31	35	28	23	27	34	38	28	40
💪 Inspirational	30	36	24	37	29	26	32	29	38
✏️ Helpful/How-to Guides	27	27	28	36	39	22	27	26	43
👋 Personable	27	25	26	25	26	30	25	24	26
🔥 Trendy	24	36	24	20	27	34	35	29	30
🫶 Community-driven	23	17	44	31	37	21	16	25	19
🥰 Heartwarming	23	21	21	14	21	23	23	18	25
🌈 Inclusive	21	22	32	25	25	22	20	22	23

Capturing the right mood

Every platform has its own unique vibe. One might offer a feature that another doesn't, and there's a specific reason millennials log on to the platforms they do. Brands need to remember that, when it comes to social media marketing, a one-size-fits-all approach isn't the way to go. Learn what users on different platforms are looking for, and you'll be better placed to engage with them.

The best place to start is by leaning into humor. Millennials don't necessarily stand out for liking this content, but it's popular on most platforms and among various younger audiences. Some of the most successful brands on social media are the ones who can tell a good joke – or know **how to take one**. Read the room before you post though. Millennials, like any generation, have their own unique sense of humor, and **a lot's changed in recent years**. Get it wrong and you could be branded "cringe".

If you really want to engage with millennials, it helps to be exciting. Across 9 platforms, they're more likely than average to want this kind of material. That means keeping up-to-date with what's happening, including what's trendy and relevant – which are content qualities many also want to see.

What do you meme?

"Talk to a man in a language he understands, that goes to his head. If you talk to him in his own language, that goes to his heart." Nelson Mandela probably wasn't talking about memes, gifs, and emojis here – but the message still applies. If you want to engage with millennials (or any generation) online, you need to understand how they communicate.

Let's start with memes. Millennials actually **beat Gen Z** for saying they find memes funny, but they're also a means of helping them process certain emotions, or even express ideas they'd normally struggle to get across. They're a **language of their own**, one that's enabled people to tell jokes, but also talk about **difficult subjects**. To that end, any brand can get involved, so it's worth keeping tabs on trending meme formats. Just don't force it; attempts to fit in can **sometimes backfire**.

Then there's emojis: the little images that, like memes, help people convey emotion in an otherwise mundane post, message, or comment. While Gen Z are more likely to use emojis every day, millennials are actually more confident in understanding the meaning behind them – they're ahead of all other generations, in fact. Some are **easier to understand than others**, but it's also a case of each generation using them for **different reasons**. Brands don't have to be emoji-fluent, they just need to be clear on the ones they're engaging with.

Memes are a key way millennials express themselves

% of millennials, who've done something meme-related in the last week, who agree with the following statements

86% I find memes funny

74% I sometimes refer to memes in real life situations/offline

77% Memes help me process certain emotions

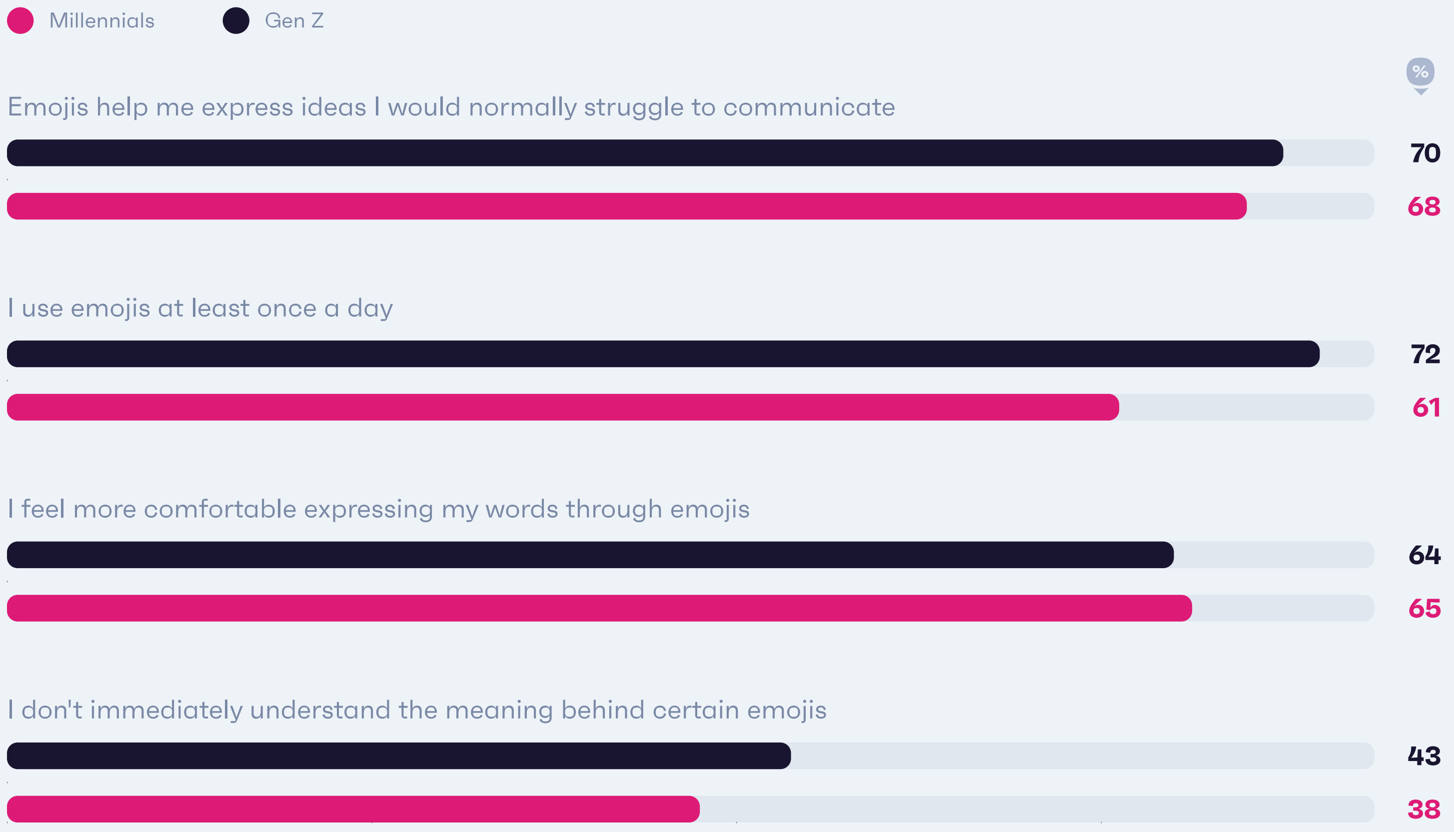
74% Memes help me express ideas I would normally struggle to communicate

GWI Zeitgeist September 2022 3,656 millennials aged 27-40 who've done something meme-related in the last week in 12 markets

Attitudes to emojis: the 😀 the 🤨 and the ☹️

13

% of millennials and Gen Z who agree with the following statements



GWI Zeitgeist May 2023 4,567 millennials aged 27-40 and 1,980 Gen Z aged 16-26 in 12 markets

Influencing a generation

As early users of social media, millennials were some of the first consumers to be exposed to influencer marketing. Despite concerns around **misinformation**, millennials are very receptive to influencers – 80% trust them (to any extent), and they're 15% more likely than the average consumer to trust them completely.

They're the most likely generation to believe that influencers are knowledgeable about the products they promote. This translates into purchase behavior, too. Millennials are 13% more likely than average to purchase a product recommended by influencers.

While this is all good news for brands who lean on these tactics, this space isn't without its challenges. **De-influencing** made headlines in early 2023, when social creators advised people against buying certain products or recommended cheaper alternatives. The backlash against **overconsumption**, growing financial pressures, and the need for more **authentic content** were driving forces behind the trend. But, de-influencing is still influencing – just with a different slant.

Despite this trend, over 1 in 3 millennials say influencer recommendations are more trustworthy than regular ads. And the number of millennial social media users following influencer accounts has grown since 2020. Brands wanting to capitalize on influencers should just be wary about selecting the right partners. As more markets step up their measures to address **misinformation**, it's vital for brands to find the right fit and ensure any partnership aligns with their brand values.

Social media use by generation

Download now

14

Millennials place a lot of trust in influencers

% of millennials who say they trust/don't trust product/brand recommendations made by social media influencers

Measuring the influencer impact

% of millennials who agree with the following statements

GWI Zeitgeist March 2023 | 3,700 millennials aged 27-40 in 12 markets

04 How to engage millennials

The purchase journey mapped out

Brand discovery

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

	%	IDX
Updates on brands' social media pages	17	1.12
Ads/sponsored content on podcasts	11	1.11
Posts or reviews from expert bloggers	16	1.10
Ads seen in virtual spaces (e.g VR/AR)	8	1.10
Ads on music-streaming services	14	1.10

Online product research

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

	%	IDX
Micro-blogs (e.g. Twitter)	15	1.14
Messaging/live chat services	17	1.13
Forums/message boards	15	1.11
Blogs on products/brands	20	1.10
Vlogs (blogs recorded in video form)	14	1.10

Online purchase drivers

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

	%	IDX
Option to use "buy" button on a social network	16	1.14
Exclusive content or services	13	1.12
Live-chat box so you can speak to the company	14	1.10
Ability to pay with cash on delivery	19	1.07
"Guest" check-out	14	1.05

Brand advocacy

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

	%	IDX
When something enhances my online reputation/status	17	1.13
Access to exclusive content or services	20	1.10
Having insider knowledge about the brand or its products	22	1.07
The feeling of taking part/being involved	23	1.05
When something is relevant to my friends' interests	21	1.05

GWI Core Q1 2023 | 81,921 millennials aged 27-40

What do millennials want from brands?

For millennials, reliability is king. In times of an economic slowdown, especially when brand loyalty is tested, consumers are looking for ways to get value beyond cost. Nearly half of millennials are loyal to the brands they like, so if brands have good suppliers and can manage quality control on the products they provide, this will likely go a long way – creating valuable advocates at a time when trust is crucial.

They can take this further by supporting consumers post-purchase too. Millennials are 10% more likely than average to cite a live-chat feature as a purchase driver, and the number one thing they expect from brands is to listen to feedback. Being on-hand to deal with any questions they may have is a simple and effective way of earning those all-important repeat customers.

There's also social responsibility to be aware of. When money gets tight, it's easy for consumers to see sustainability as a "luxury problem", and our data **backs this up**. Since Q4 2020, the number of millennials who say being financially secure is important to them has barely changed, while the number who say this about helping others or the environment has fallen 5%. That doesn't mean businesses should put DE&I on the back burner though; it's the time to **do the opposite**. Younger audiences are looking to brands to **offer diverse workplaces**, as well as double down on their social and eco commitments. Times are tough, but companies can do lasting damage if they let their values slip.

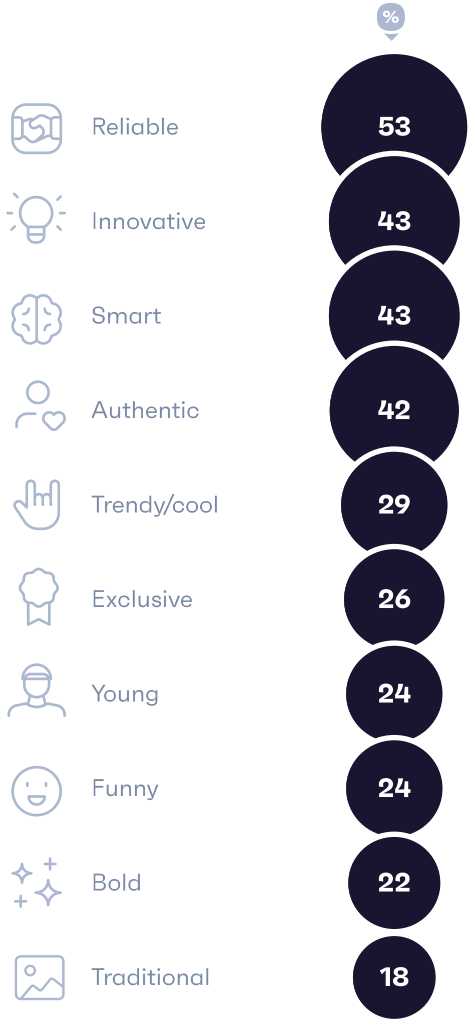
From awareness to action
When it comes to social issues and sustainability, consumers want three things: transparency, accountability, and brand responsibility.

Get the story

16

Brand qualities

% of millennials who want brands to be the following



Brand actions

% of millennials who say brands should do the following

GWI Core Q1 2023 81,921 millennials aged 27-40

Analyzing the millennial budget

Financial strain doesn't mean an absolute block on spending; consumers often prioritize their spending and make money-saving swaps to free up room for little treats. This pattern is known as the **"lipstick effect"**, but it can apply to any product.

Luxuries come out on top when looking at what consumers would spend less on further down the road. Think along the lines of expensive, often status-enhancing, products that consumers are more comfortable buying when times are good. That includes the likes of sunglasses, jewelry, or wristwatches, all products that fewer consumers are purchasing wave-on-wave. Millennials are no different; 42% expect to spend less on treats/luxuries, and the number who purchased any personal items in the last 3-6 months has fallen 8% since 2018.

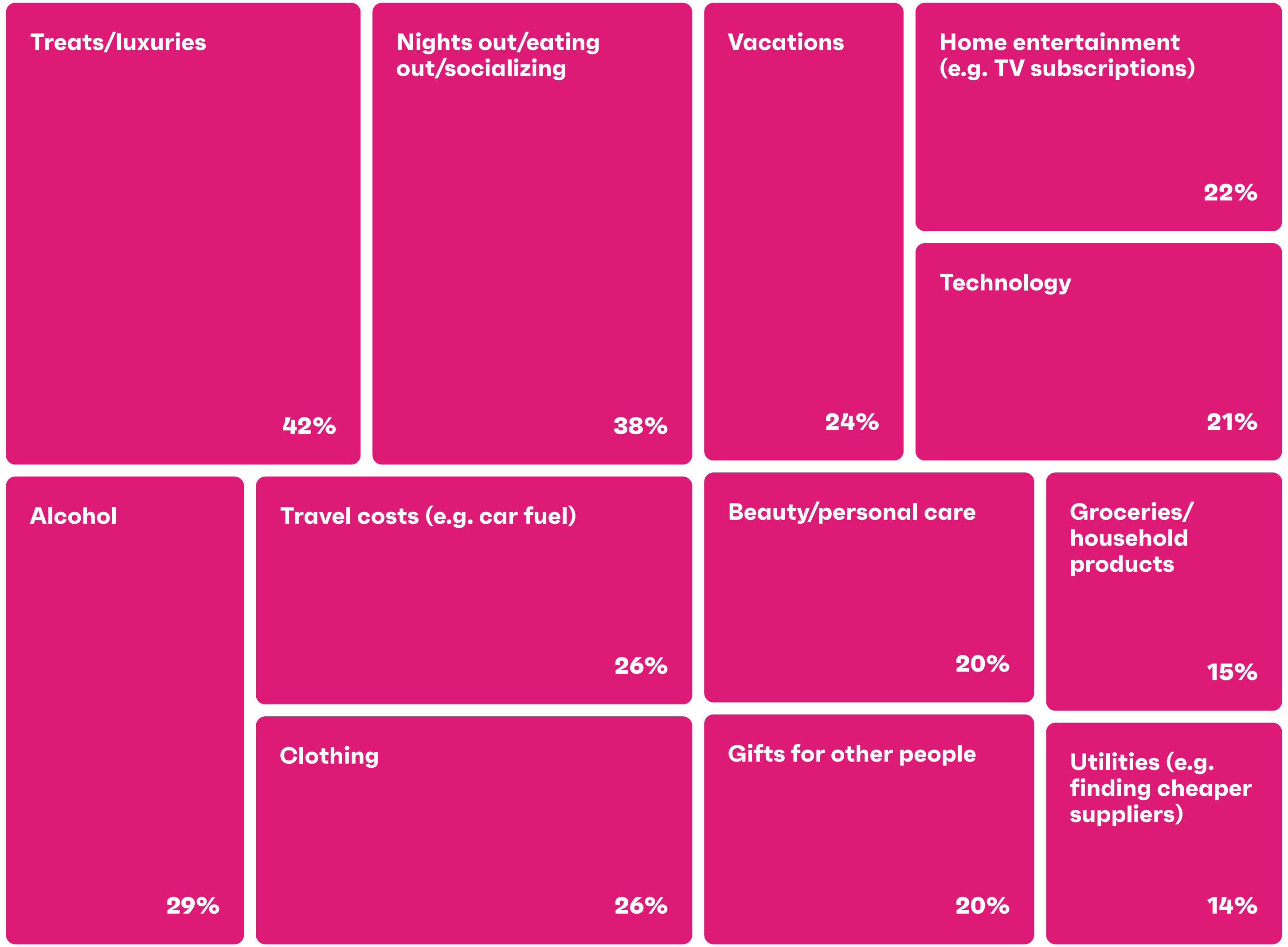
But brands in these sectors **can still thrive**, especially by targeting this generation. In fact, our data reveals that millennials are tied with Gen Z as the most likely to say they're spending more than they were in 2022, and they're also the most likely to make luxury purchases in general.

Something that millennials are willing to make a little wiggle room for is travel. Vacations are a big purchase, but there are several everyday items that millennials would sooner slash from their budgets. In the last wave alone, we've seen a 22% rise in millennials planning to purchase vacations abroad, and a 15% rise in those planning to buy domestic ones; a welcome relief from trying times.

Where millennials prioritize their cost-cutting

17

% of millennials who say they would spend less on the following in the future



GWI Zeitgeist January 2023 5,241 millennials aged 27-40 in 12 markets

Live shopping experiences in APAC

On the whole, millennials are more likely to use social media to watch livestreams than any other generation, but you have to cast your eye on APAC markets to get a sense of just how popular an activity – and opportunity – it really is. Of the top 10 markets for watching livestreams online or on social media, 5 of them are in APAC.

With social media already a key part of millennials' purchase journey, livestreaming is well-placed to support their preference for content and entertainment. Not to mention the ever-increasing popularity of videos on social media – the effects of which **have already been felt** in the world of ecommerce.

It's a match made in heaven for some sectors, particularly luxury. In China, brands like Tom Ford, Tommy Hilfiger, and Michael Kors have **joined the fray** as consumers watch influencers talk about their purchases and provide detailed insight into the products. It gives influencers more control, but this means more avenues for creativity – like the **"quiet-selling"** trend in China, where influencers depart from the often fast-paced, dialogue-heavy format of traditional ecommerce livestreams.

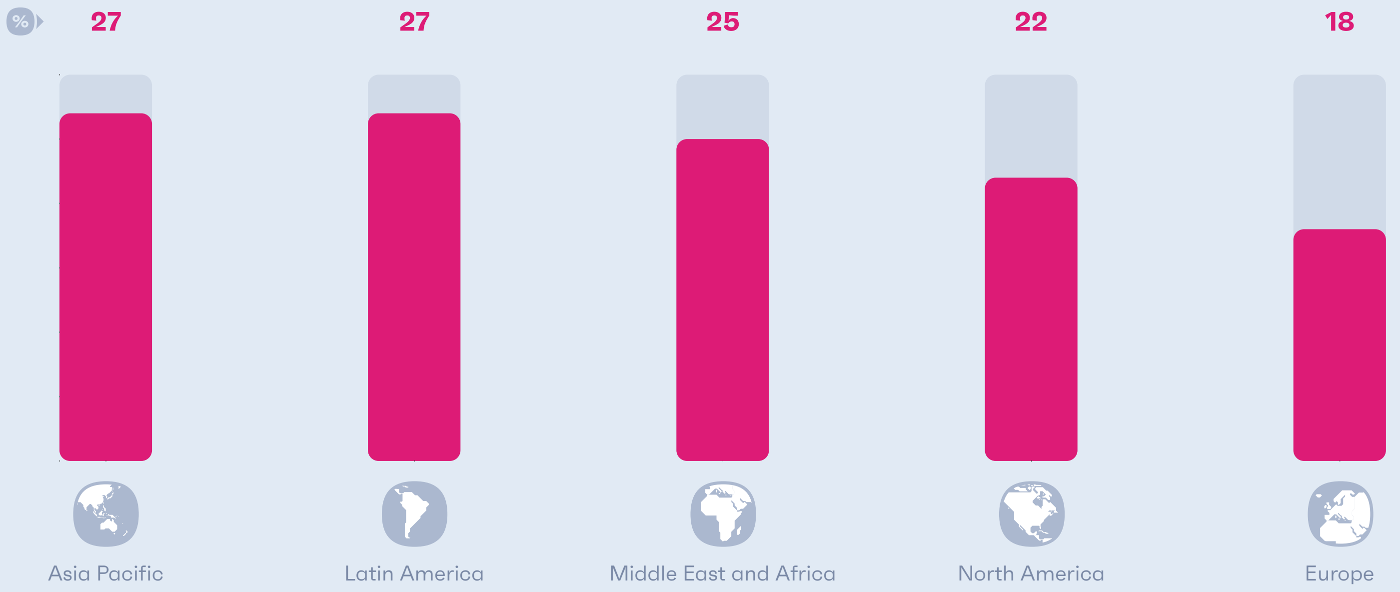
44%

of millennial TikTokers in APAC say they've watched a livestream on the app in the last month, up 17% since Q4 2020

Millennials in APAC lead the way for livestreams

18

% of millennial social media users in the following markets who use social media to watch livestreams



GWI Core Q1 2023 78,375 millennial social media users aged 27-40

Your audience is in our platform

Our platform gives you instant access to the answers you're missing. With consistent audience research that's run worldwide, this is your window into their world – through a global and local lens.

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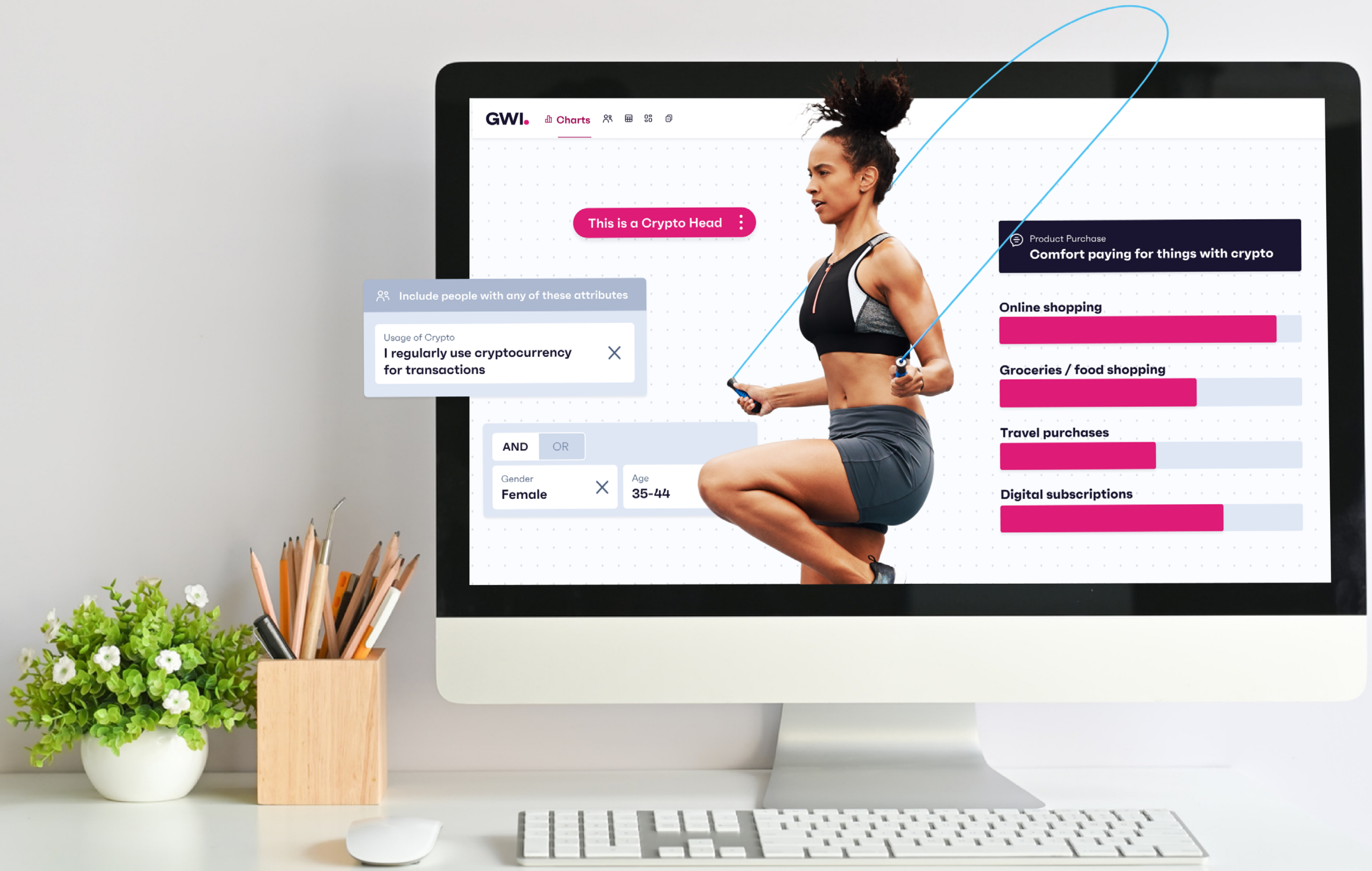

Appendix

1. What best describes your marital status? (Married) • How many children do you have? • Are either you or your partner currently expecting a child? • What is your current working status? • Which of these best describes your role?
2. Which of these things are you interested in?
3. In the next 6 months, how do you think the following will change? (My personal finances will get better)
4. Which of the following issues/movements are important to you?
5. On an average day, how long do you spend on the following?
6. On an average day, how long do you spend on the following?
7. On an average day, how long do you spend listening to podcasts? • Which are your preferred types of podcasts?
8. What type of media do you feel nostalgic for, if at all? • To what extent do you agree or disagree with the following statements?
9. How interested are you in esports? • Thinking about gaming, which of these things do you do?
10. To what extent do you agree or disagree with the following statements?
11. How often do you visit or use these services? • Which of these would you say is your favorite?
12. Which of the following describes the type of content you would like to see on the following platforms?
13. To what extent do you agree or disagree with the following statements? • How often do you use emojis, if at all?
14. How much do you trust product/brand recommendations made by social media influencers? • Thinking about social media influencers, to what extent do you agree or disagree with the following?
15. 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?
16. Which of these do you want brands to be? • Which of these things do you want brands to do?
17. Thinking ahead, which of these would you spend less on?
18. What are your main reasons for using social media? (Watching livestreams)

Notes on methodology

Introduction

All figures in this report are drawn from GWI's online research among internet users aged 16-64 or 16+. Please note that our figures are representative of the online populations of each market, not its total population.

Our research

Each year, GWI interviews over 970,000 internet users aged 16-64 across 52 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.

Sample size by market

This report draws insights from GWI's Q1 2023 wave of research across 52 markets, with a global sample of 81,921 millennials.

Argentina	599
Australia	2,681
Austria	652
Belgium	567
Brazil	3,238
Bulgaria	396
Canada	1,974
Chile	478
China	9,850
Colombia	1,383
Czech Republic	379
Denmark	422
Egypt	696
France	2,891
Germany	3,024
Ghana	339
Greece	369
Hong Kong	694
Hungary	399
India	5,839
Indonesia	2,472
Ireland	449
Israel	499
Italy	2,752
Japan	2,789
Kenya	363
Malaysia	1,678
Mexico	1,928
Morocco	310
Netherlands	710
New Zealand	594
Nigeria	320
Norway	399
Philippines	1,491
Poland	1,109
Portugal	668
Romania	393
Russia	1,479
Saudi Arabia	835
Singapore	1,177
South Africa	705
South Korea	655
Spain	2,839
Sweden	793
Switzerland	481
Taiwan	902
Thailand	1,638
Turkey	754
UAE	1,006
UK	3,172
USA	8,274
Vietnam	1,417

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.

	%		%
Argentina	93	Malaysia	96
Australia	99	Mexico	85
Austria	96	Morocco	89
Belgium	98	Netherlands	97
Brazil	91	New Zealand	98
Bulgaria	90	Nigeria	70
Canada	99	Norway	100
Chile	92	Philippines	78
China	79	Poland	95
Colombia	83	Portugal	92
Czech Republic	97	Romania	94
Denmark	100	Russia	97
Egypt	70	Saudi Arabia	94
France	97	Singapore	99
Germany	97	South Africa	81
Ghana	64	South Korea	100
Greece	92	Spain	98
Hong Kong	100	Sweden	99
Hungary	96	Switzerland	99
India	48	Taiwan	97
Indonesia	70	Thailand	85
Ireland	98	Turkey	90
Israel	96	UAE	99
Italy	92	UK	99
Japan	97	USA	93
Kenya	69	Vietnam	78

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