

Generations

GWI AUDIENCE REPORT SUMMARY Q2 2014

Understanding the digital behaviors and attitudes of
the Millennial, Gen X and Baby Boomer Generations



globalwebindex

INTRODUCTION

GWI Audience reports are designed to examine the digital behaviors of particular demographic groups – showcasing trends over time as well as analyzing how the audiences in question compare to the overall internet population.

In this report, we place a spotlight on three key generations – Millennials, Gen X and the Baby Boomers. Drawing on our research program across 32 countries and nearly 90% of the global internet audience, we look specifically at:

- How and why people are going online
- Usage of mobiles and tablets
- Engagement with social platforms
- The numbers who are buying online
- The ways in which people are interacting with brands and discovering new products
- Regional and country-specific trends

Clients can explore the behaviors and interests of these groups further by building audiences on the PRO Platform.

Please note: unless otherwise stated, figures for “Millennials”, “Gen X”, “Boomers” and “All Internet Users” are for Q1 2014.

The three generations are based on the following definitions:

Millennials – those aged 16-30 in 2013

Generation X – those aged 31-50 in 2013

Baby Boomers – those aged 51-64 in 2013

Millennials should be considered interchangeable with the term “Generation Y”.

KEY TRENDS & NUMBERS

Millennials Lead for Mobile, while Gen X are Ahead for Tablets

Strong VPN Usage among Millennials and Gen X

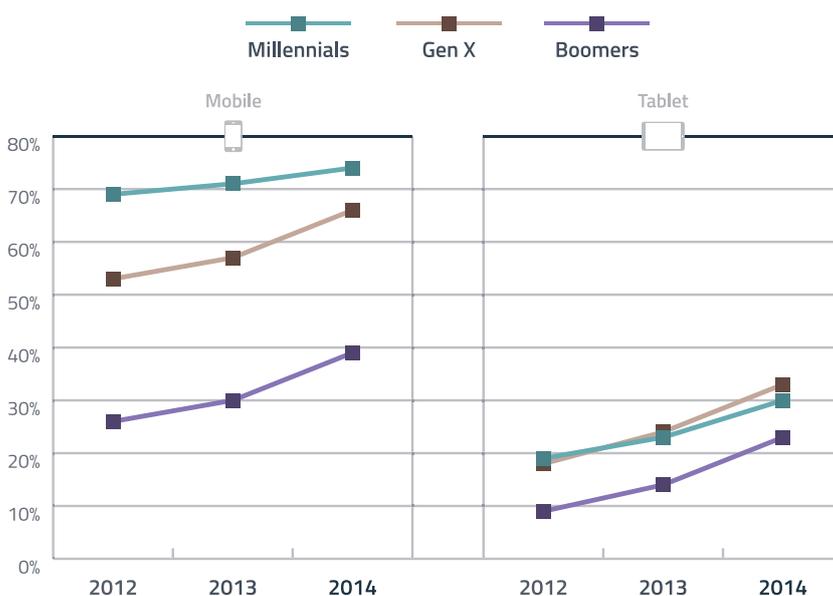
Facebook is the Top Social Network

Second-Screening Widespread in all Generations

Increasing Numbers are Buying Online

MILLENNIALS LEAD FOR MOBILE, WHILE GEN X ARE AHEAD FOR TABLETS

Mobile and Tablet Internet Usage



Question: In the past month, from which of the following devices have you accessed the internet either through a web browser or an application? // **Source:** GlobalWebIndex Q2 2012, Q1 2013, Q1 2014 // **Base:** Internet users aged 16-64

- Mobiles and tablets are becoming increasingly important internet access points, posting consistent year-on-year increases in all three generations.

- Nevertheless, engagement varies between the groups. Millennials are the biggest users of the mobile internet (74% used a mobile to go online within the last month, vs. 66% of Gen X and just 39% of Boomers). For tablets, Gen X take the lead (33%, vs. 30% for Millennials and 23% for Boomers).

- Android is the dominant mobile and tablet operating system for all groups. Its lead over iOS is especially pronounced on mobiles, but the gap is much closer for tablets (especially among Millennials, where the premium attached to iPads remains strong).

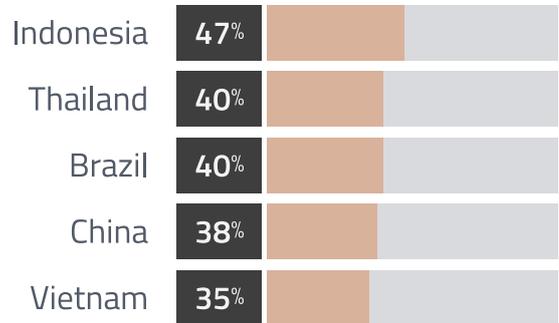
STRONG VPN USAGE AMONG MILLENNIALS AND GEN X

- Overall, nearly a third (32%) of Millennials and just over a quarter (27%) of Gen X are using Virtual Private Networks and Proxy Servers to access the internet.

- Millennials are a little ahead of average for wanting to access better entertainment content, use restricted social networks and use download sites; Gen X have a slight lead for wanting to communicate with friends/family abroad, access restricted news websites, use restricted sites while at work and avoid government monitoring.

- Usage of VPNs is much less pronounced among the Boomers (13%).

Top 5 Countries for Millennial Usage of VPNs



FACEBOOK IS THE TOP SOCIAL NETWORK

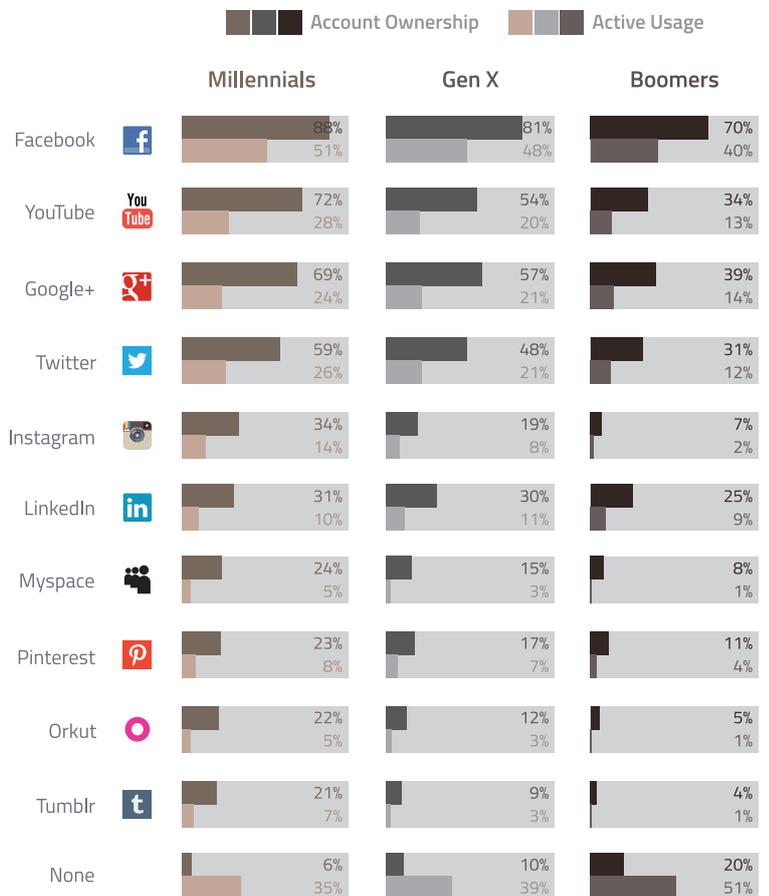
- Facebook is still the number one social network for both account membership and active usage – a trend which holds true across all generations.

- Millennials are the most likely of all to be using Facebook (outside of China, 88% have an account and 51% use it actively), but the equivalent figures for Boomers are still impressive (70% and 40% respectively).

- Three networks compete for second position in terms of active usage – with YouTube claiming second spot for Millennials, Twitter for Gen X and Google+ for the Boomers. There is little separating the three platforms in each case, though.

- Across all three generations, all of the social and messaging apps tracked by GWI are experiencing increases. In the last six months, for example, usage of Instagram was up by 25% for Millennials, 31% for Gen X and 8% for the Boomers. WhatsApp has been posting some of the most impressive rises of all – up by 30% (Millennials), 34% (Gen X) and 60% (Boomers).

Social Networks: The Top 10



Question: On which of the following services do you have an account? And which of the following services have you used or contributed to in the past month using any type of device? e.g. PC/Laptop, Mobile phone, Tablet, etc // **Source:** GlobalWebIndex Q1 2014 // **Base:** Internet users aged 16-64, exc. China

SECOND-SCREENING WIDESPREAD IN ALL GENERATIONS

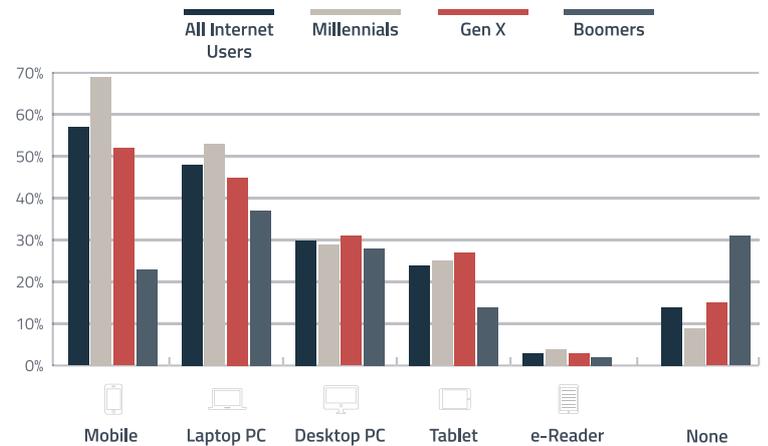
- **Second- or dual-screening is a mainstream activity in all generations.** Overall, 86% say they have used an additional device while watching television; this reaches its highest point among Millennials (91%) and Gen X (85%) but falls notably among Boomers (69%).

- The devices being used for dual-screening are also subject to variation. **For Millennials, mobiles are by far the most popular (69%),** followed by laptops (53%) and then desktops (29%). The same is true for Gen X, but the gap between mobiles and laptops is much smaller.

- Quite a different picture emerges for Boomers: laptops take top position (37%), with mobiles falling to third place. As elsewhere, this gives more evidence that the “mobile first” mindset is most pronounced among the younger generations.

- For Millennials, the most important reasons for second-screening are **chatting to friends (74%), reading news (50%) and playing games (49%).**

● Second-Screening



Question: Which of the following devices have you used while watching TV? // Source: GlobalWebIndex Q1 2014 // Base: Internet users aged 16-64

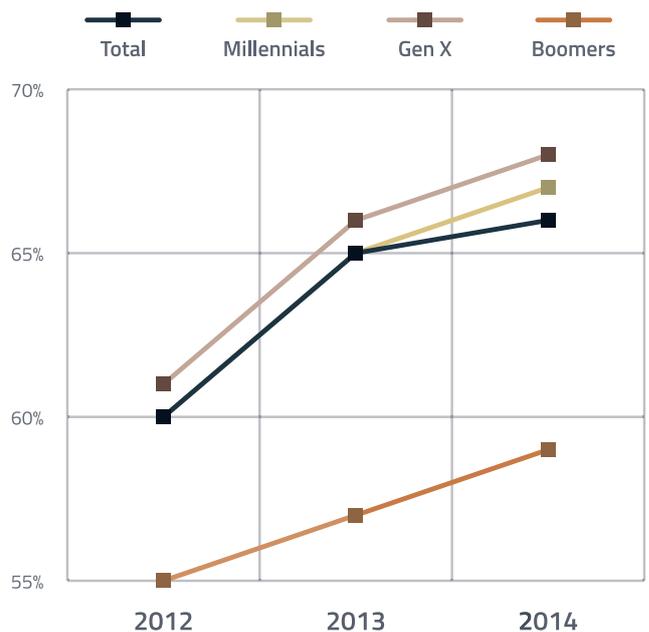
INCREASING NUMBERS ARE BUYING ONLINE

- **Levels of online purchasing are growing,** with Gen X the most likely of all to be doing this (by Q1 2014, 68% had purchased something online within the last month – a climb from 61% back in early 2012). However, the figures are strong among the other two generations too (67% for Millennials and 59% for Boomers).

- **Webrooming** – the process whereby people investigate products online and then purchase them offline – is most pronounced among the Boomers. The products most susceptible to this behavior are cars, flat screen TVs, laptops, mobiles and white goods.

- **Significant numbers in all generations say that they have posted a review of a product or brand online** within the last month. Millennials are the most active for this behavior, at 63%. Gen X follow closely behind (58%), with Boomers in third place (44%).

● Buying Online



Question: Which of the following have you done online in the last month? Purchased a product (via any device) // Source: GlobalWebIndex Q2 2012, Q1 2013 and Q1 2014 // Base: Internet users aged 16-64



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