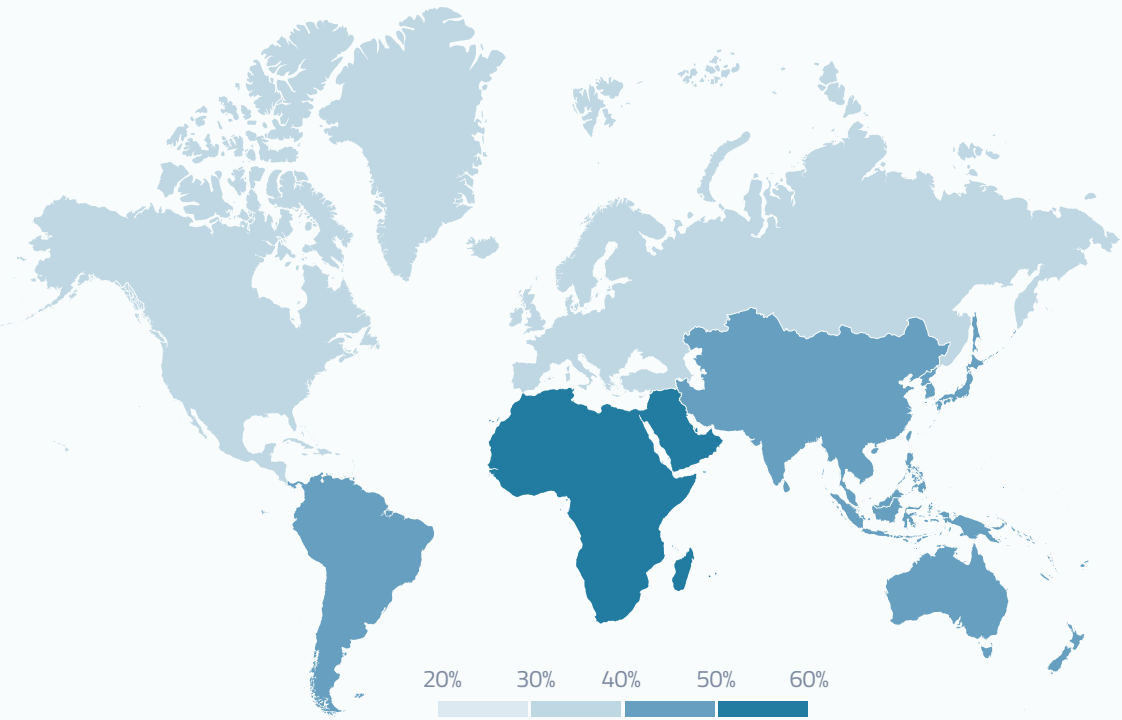


Millennials

DEMOGRAPHICS & LIFESTYLE

Region

% of internet users aged 16-64 who are Millennials (21-34s)



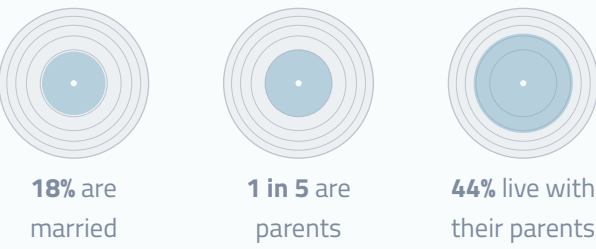
Asia Pacific	48%
Europe	35%
Latin America	46%
Middle East & Africa	50%
North America	34%

Millennials are Ambitious

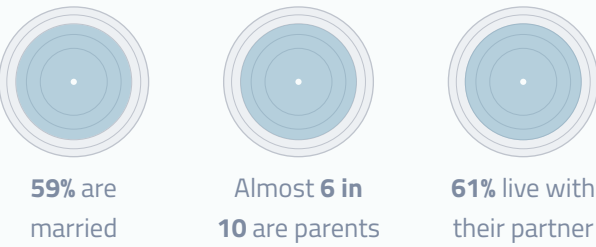
- 1 in 10 are Senior Decision-Makers in their workplace
- 2 in 3 say they are very career orientated
- 43% feel money is the best measure of success

The “Millennial” Definition Covers a Broad Range of Life Stages

58% are aged 21-27, of which...



42% are aged 28-34, of which...



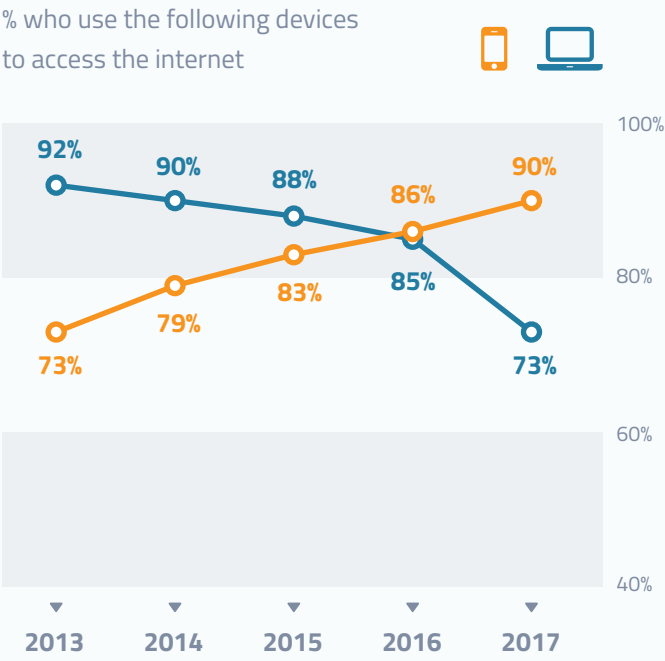
Travel is an Important Life Experience

- 54% travel abroad once a year
- 28% strongly agree that they like to be surrounded by different people, cultures, ideas and lifestyles
- 1 in 8 are posting online about travel and vacations
- 1 in 2 Airbnb users are Millennials

DEVICE

Mobile is their Primary Device

- Millennials spend an average of 3:43 hours per day online on mobile
- 7 in 10 say mobile is their most important device for getting online
- 8 in 10 are using their mobile while watching TV, half are using messaging apps



Despite the Rise of Mobile, PCs/Laptops Are Not Being Abandoned

- 3 in 4 access the internet via a personal PC/laptop
- Millennials in mature markets are most attached to PCs/laptops – 3 in 10 cite laptops as their most important device in North America, for example

SOCIAL

Top 10 Social Networks

% who have visited the following in the past month...

YouTube	85%	Twitter	46%
Facebook	84%	LinkedIn	29%
WhatsApp	62%	Pinterest	28%
Facebook Msgr	59%	Snapchat	27%
Instagram	58%	LINE	20%

- Millennials spend an average of 2:41 minutes on social media per day
- Millennials maintain an average of 9 social network / messaging app accounts

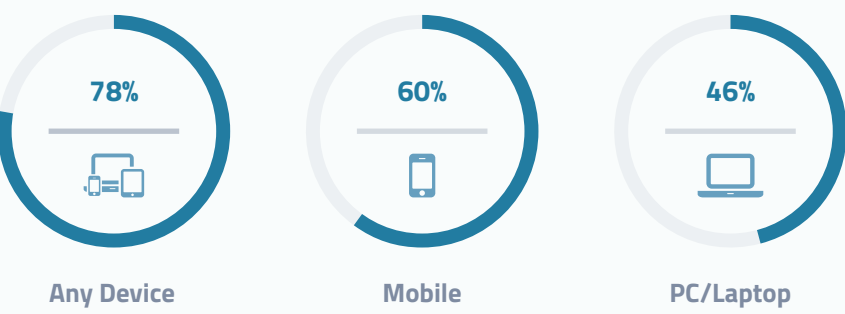
Social Media Engagement is Changing

- 22% use social media to share details of their daily lives, compared to 33% in 2014
- 3 in 10 now use social media to research products to buy
- 42% use social media to keep up with the latest news

COMMERCE & BRAND ENGAGEMENT

Online Shopping

% who purchased a product online in the past month via...



Millennials are More Than Comfortable Shopping on Mobile



8 in 10 visited an online retail site on their mobile last month



38% used a mobile payment service last month

Top 5 Brand Advocacy Over-Indexes

% who say the following would motivate them to endorse a brand

		IDX
Access to exclusive content or services	18%	1.14
When something enhances my online reputation / status	15%	1.14
The feeling of taking part / being involved	23%	1.10
When I have a personal / one-on-one relationship with a brand	18%	1.08
When something is relevant to my friends' interests	22%	1.07

Convenience, Entertainment and Status are Key to Brand Advocacy

- 1 in 2 posted a review online in the last month
- 14% MORE likely to want their favorite brand to provide entertaining videos (14% do)
- 17% want their favorite brand to provide useful apps and services
- 14% MORE likely to promote a brand if it enhances their online reputation (15% would)

Top 5 Online Brand Interactions

% who have done the following brand-related actions in the past month

Visited a brand's website	42%
Read an email / newsletter from a brand	27%
Watched a video made by a brand	22%
Clicked on an online ad displayed at the top*	16%
Visited a brand's social network or micro-blog page	16%

*or along the side of a website

Social and Video Key to Online Shopping

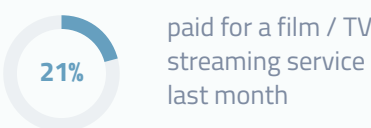


- 37% discover brands on social networks, 1 in 5 do so before online TV shows



- 46% research products online via social networks, 1 in 5 do so on video sites

ENTERTAINMENT



3 in 4 used a music streaming service last month



6 in 10 used a film / TV streaming service last month



1 in 5 used Spotify last month



3 in 10 used Netflix last month

Millennials prefer to Access Content, Rather Than Own it

Unless stated otherwise, all figures are drawn from our Q2 2017 wave of online research among 89,029 adults aged 16-64 in 40 countries. Among this cohort, there were 34,349 'Millennial' internet users, defined as internet users aged between 21 and 34 at the time of research. Note that China is excluded from percentages relating to specific/named social networks and apps. Any year-on-year trended data has taken account of year-on-year ageing among Millennials.