



Ipsos MORI

IPSOS MORI THINKS

# MILLENNIAL

Myths and Realities



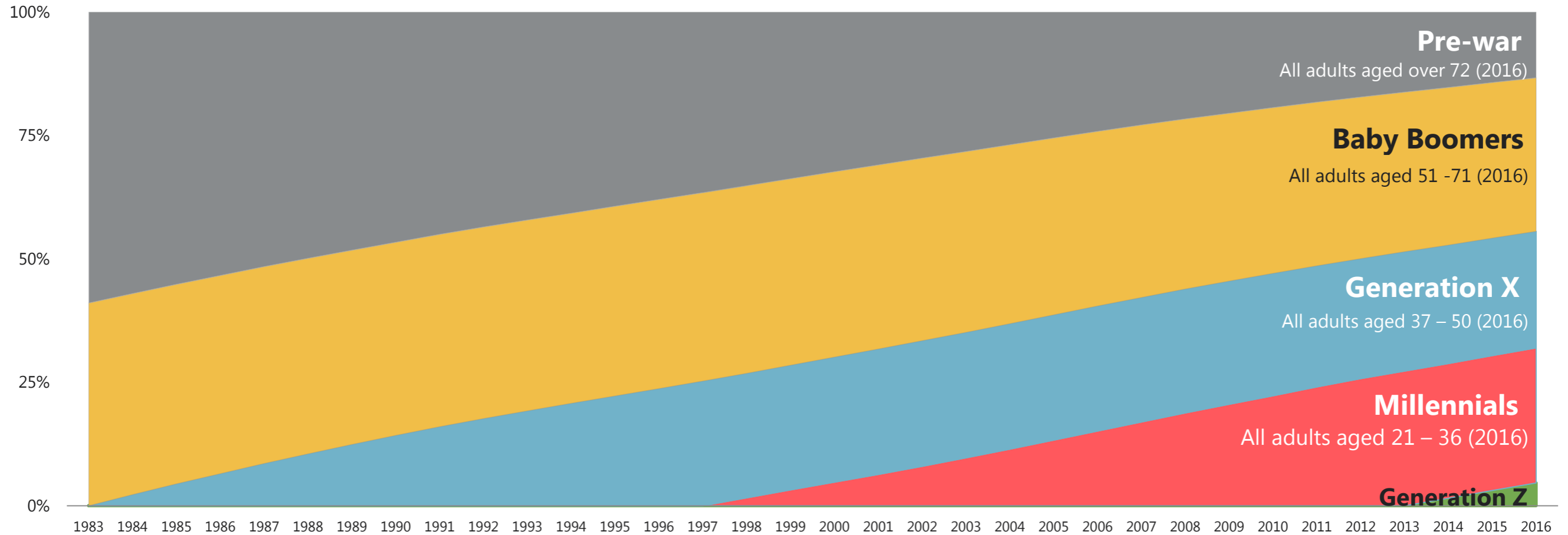
# 1.

## SUMMARY



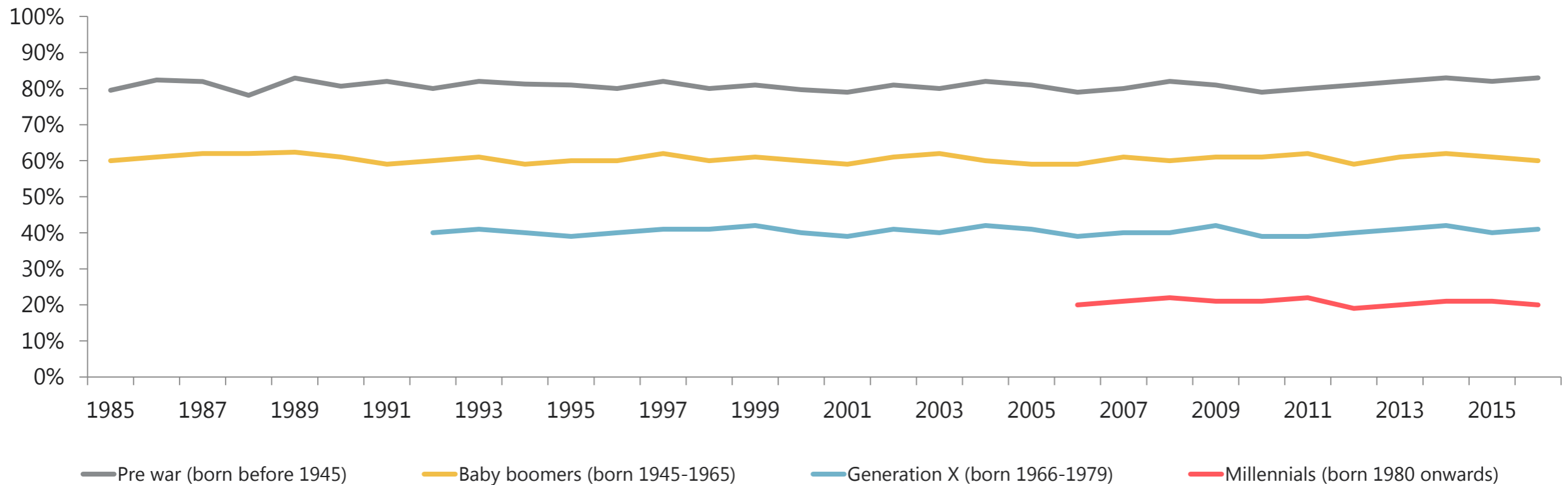
# THE GENERATIONAL MAKE-UP OF THE UK

Proportion of UK adult (18+) population from each generational grouping



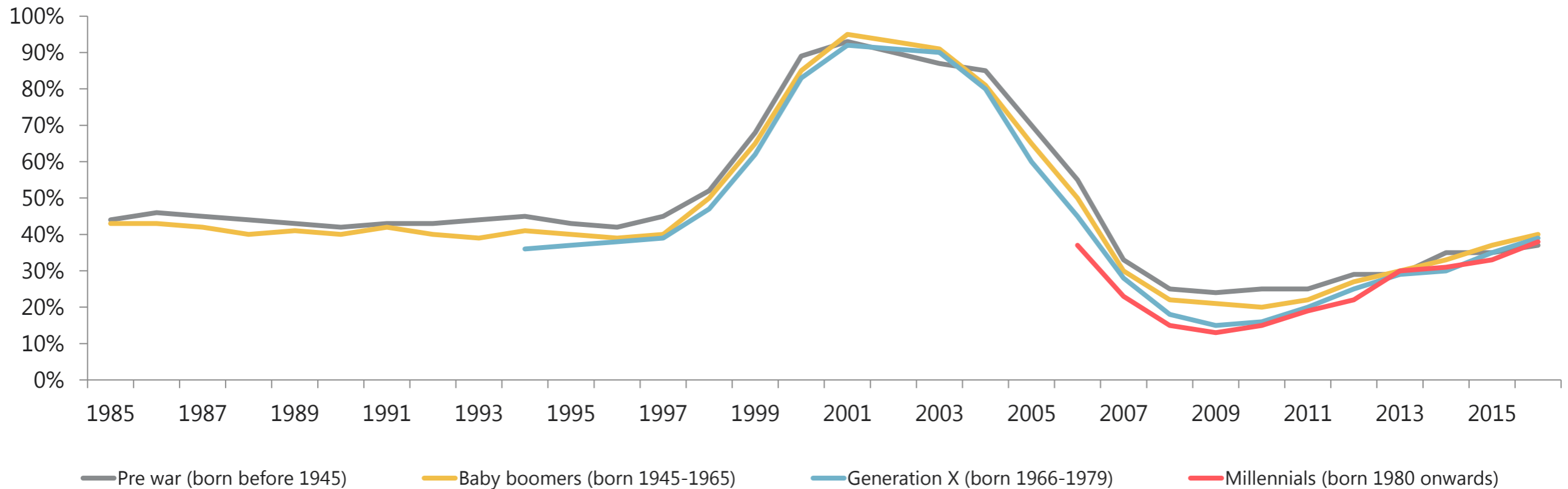
# GENERATIONAL EFFECTS: A SPOTTER'S GUIDE

Example one: A cohort effect



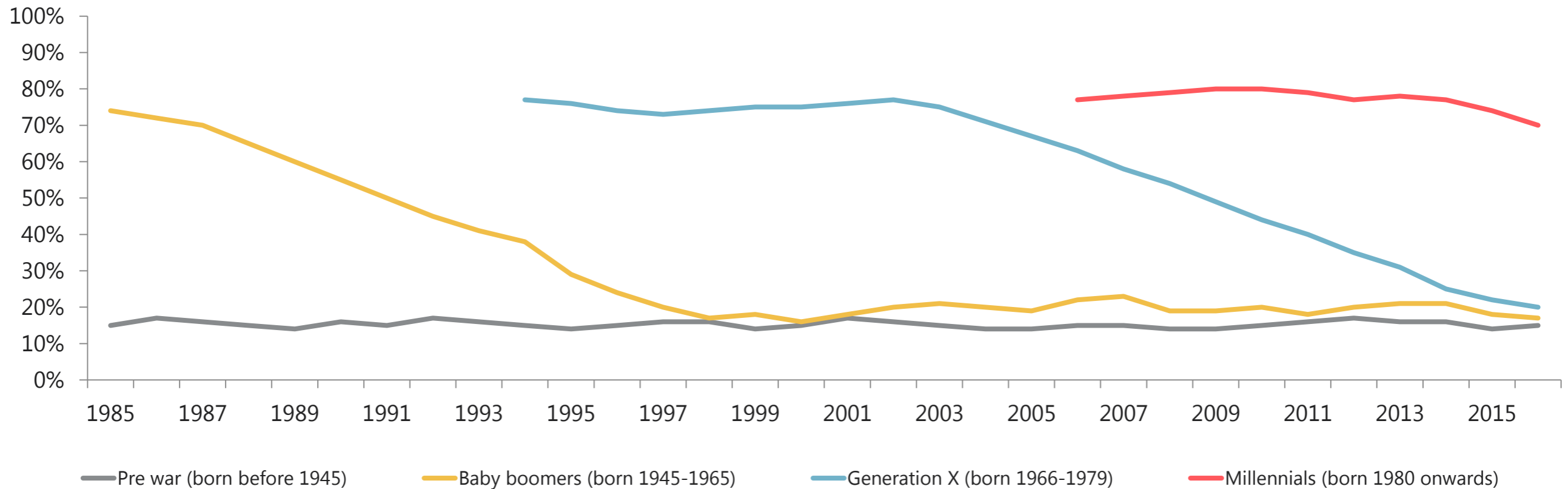
# GENERATIONAL EFFECTS: A SPOTTER'S GUIDE

Example two: A period effect

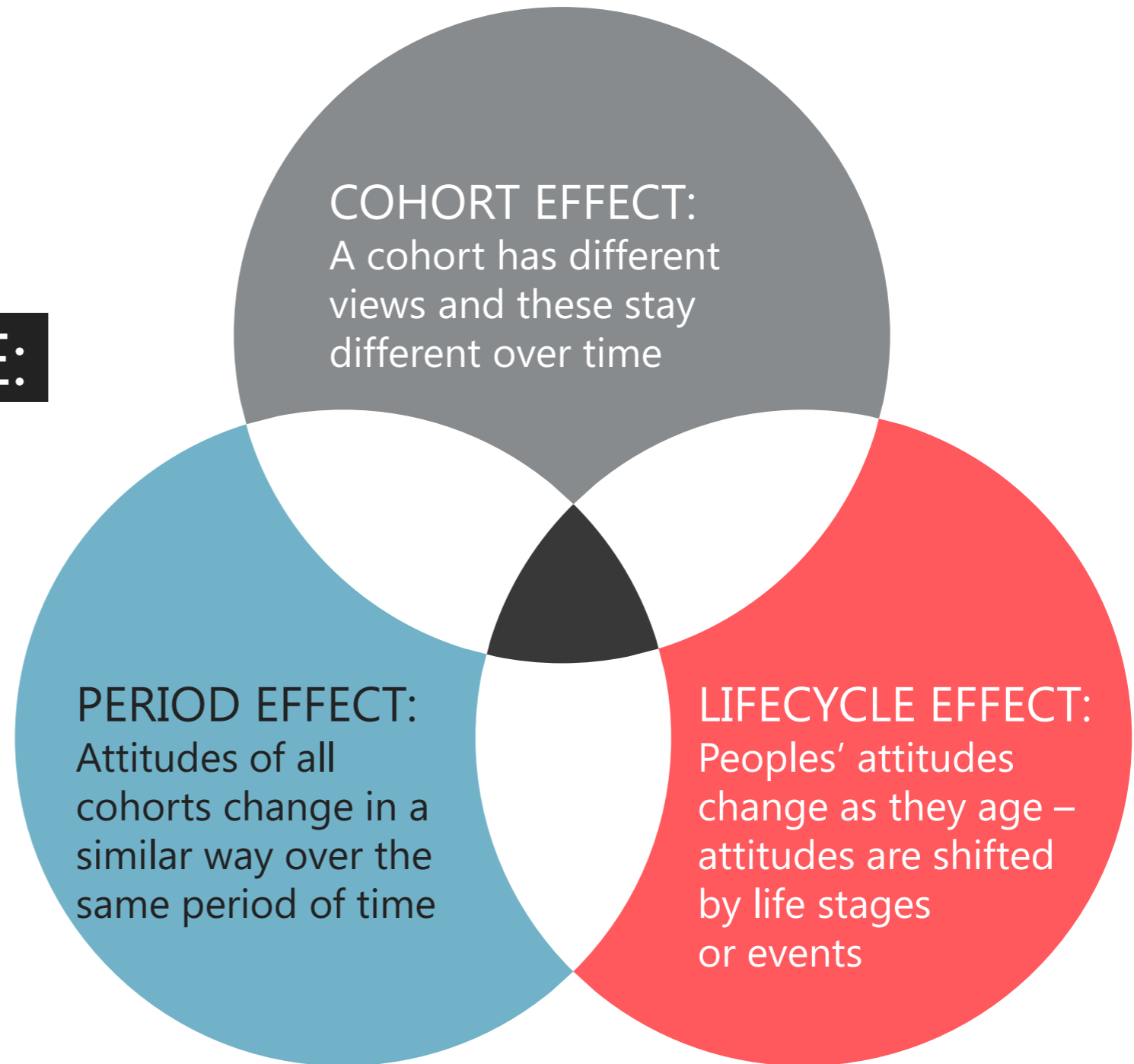


# GENERATIONAL EFFECTS: A SPOTTER'S GUIDE

## Example three: A life cycle effect



# THREE EFFECTS ON A POPULATION'S ATTITUDES AND BEHAVIOUR OVER TIME:



# GLOBAL MILLENNIAL POPULATION

Proportion of Global adult (+20) population from older age groups

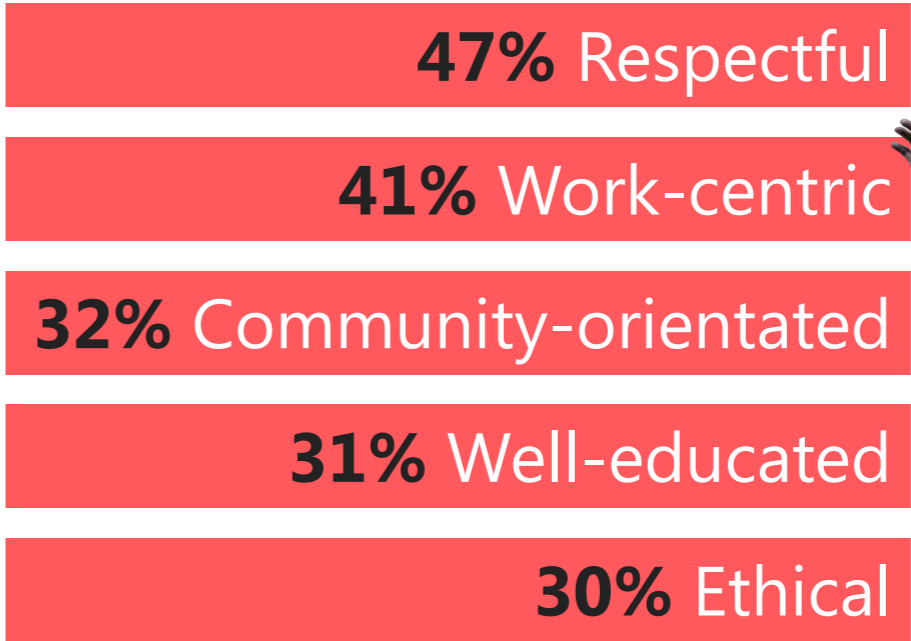
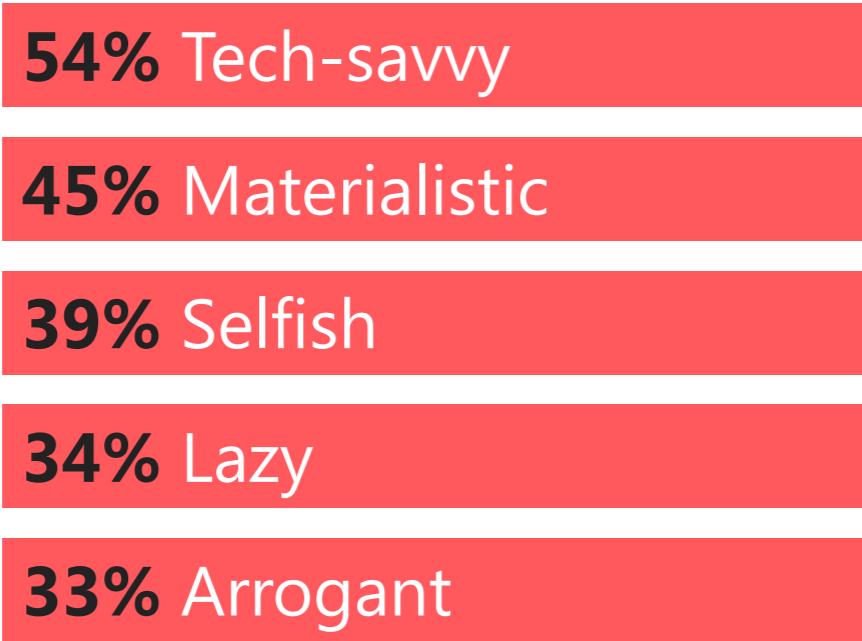
2015 adult population	World	Europe	North America	Oceania	Latin America/ Caribbean	Asia	Africa
<b>Millennials</b> (20-34)	36% 1.8bn	25% 147m	28% 75m	32% 9m	38% 157m	37% 1.1bn	49% 284m
<b>Older</b> (Aged 35+)	64% 3.1bn	75% 438m	72% 193m	68% 18m	62% 258m	63% 1.9bn	51% 294m



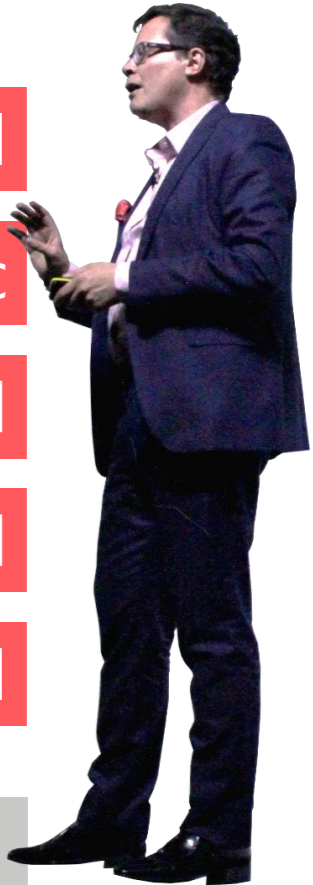
# Millennials are judged harshly compared to Baby Boomers?

Top 5 words to describe:

Millennials



Baby Boomers



**Millennials describe *themselves* in the same way: 44% say their generation is materialistic, 37% selfish and 33% lazy.**

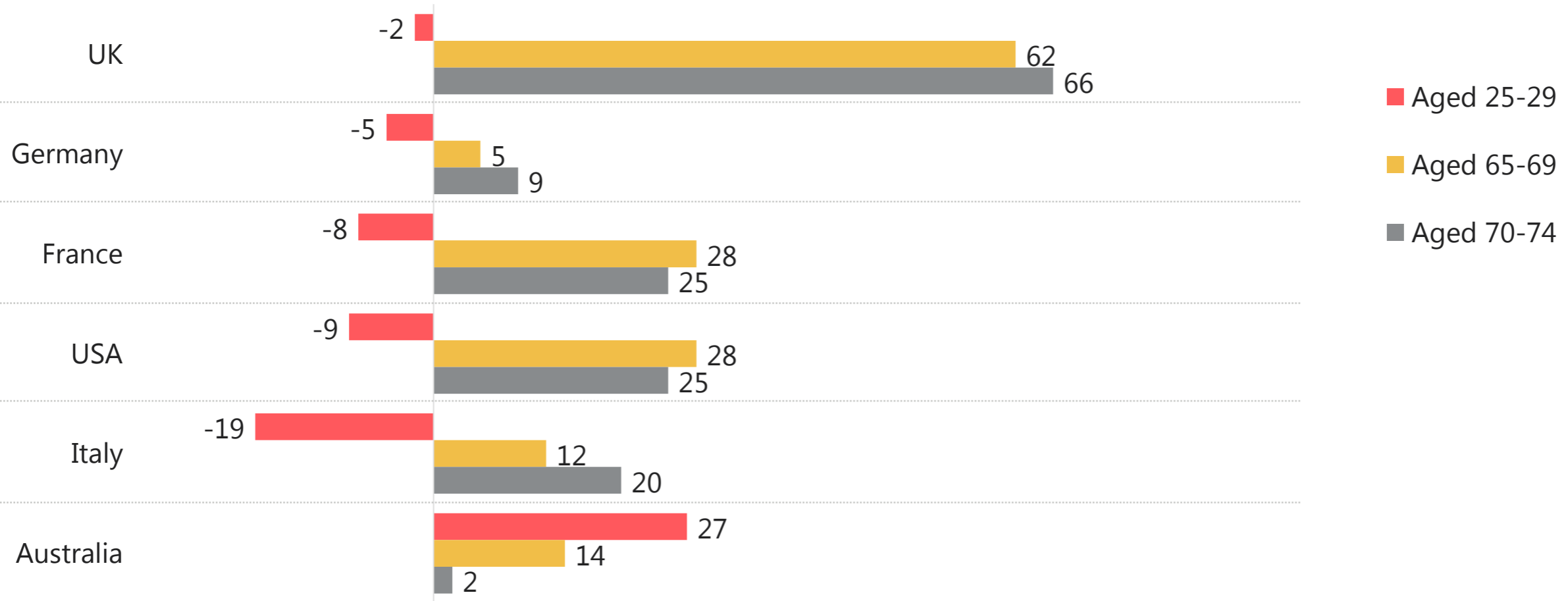
# 2.

# MONEY



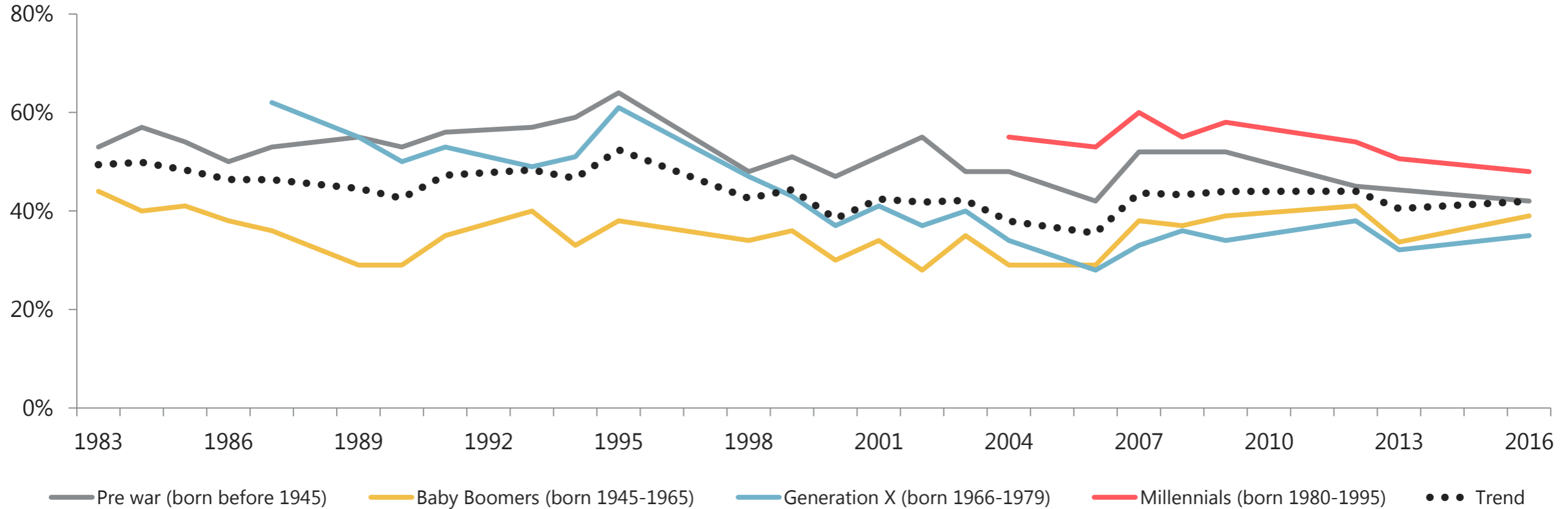
# MILLENNIALS' DISPOSABLE INCOME HAS SHRUNK

Growth in disposable income above or below national average %



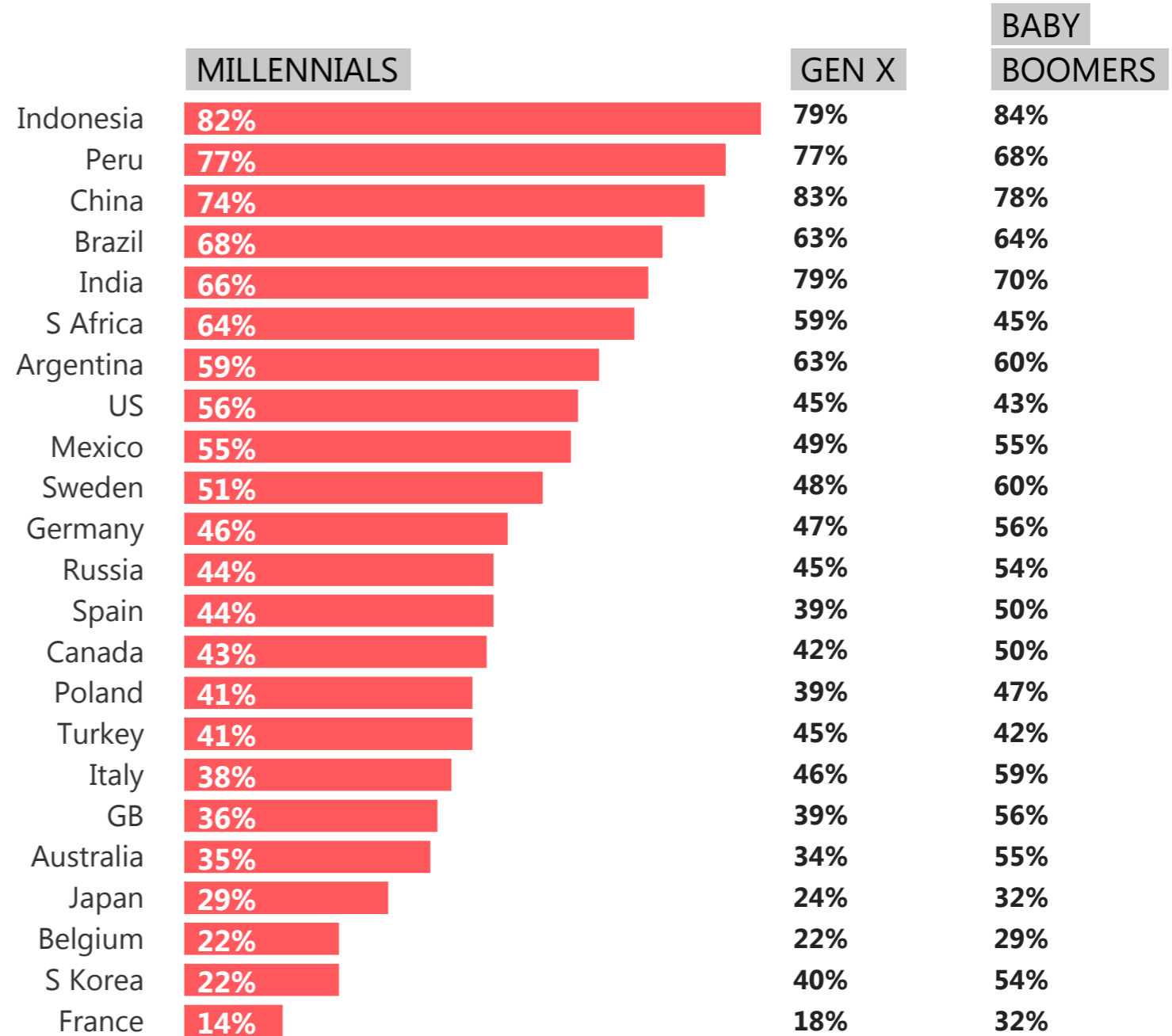
# MILLENNIALS ARE FEELING POORER FOR LONGER- GB

% placing themselves in low income group



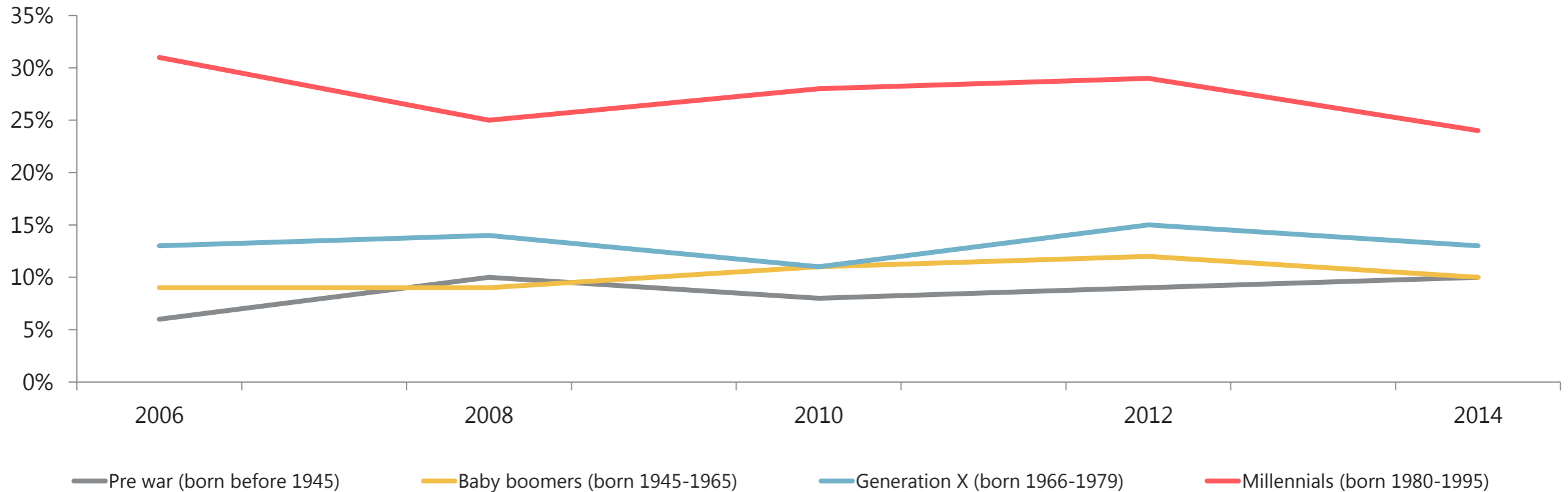
**OPTIMISM VARIES  
ACROSS MARKETS  
- IN INDONESIA,  
PERU AND CHINA  
MILLENNIALS ARE  
OVERWHELMINGLY  
POSITIVE ABOUT  
THEIR FUTURE**

% who feel they will have a better life than their parents



# MILLENNIALS MORE LIKELY TO IDENTIFY WITH MATERIALISTIC STATEMENTS- UK

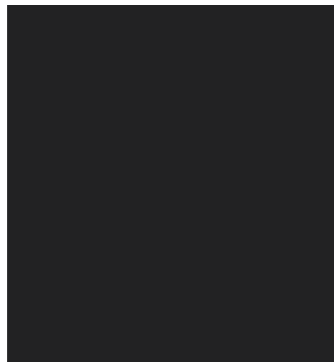
% agree it is important to be rich / want to have lots of money



# MILLENNIALS THINK THEY NEED OVER THREE TIMES LESS THAN THEY REALLY NEED FOR RETIREMENT- UK

How much needed in private pension to have an income of £25k a year for 20 years after retirement  
- median guess by generation

**£315,000**



Actual

**£200,000**



Baby Boomers

**£138,000**



Generation X (born 1966-1979)

**£90,000**



Millennials (born 1980-1995)

# 3.

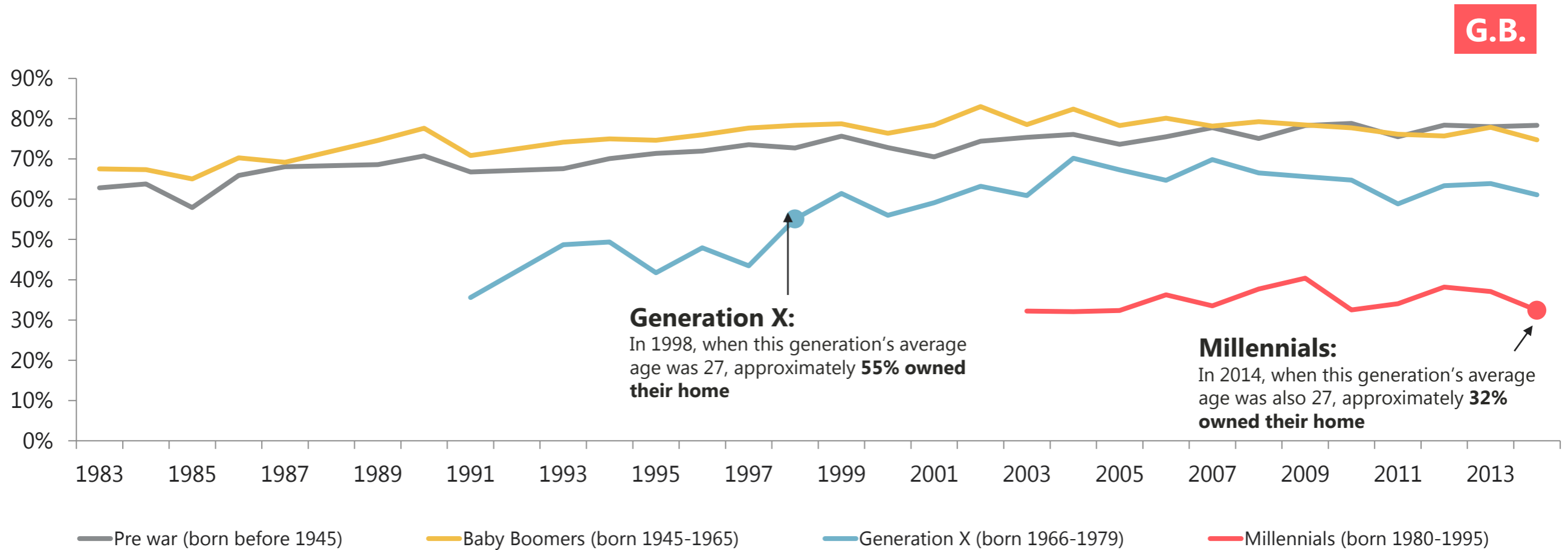
## HOUSING





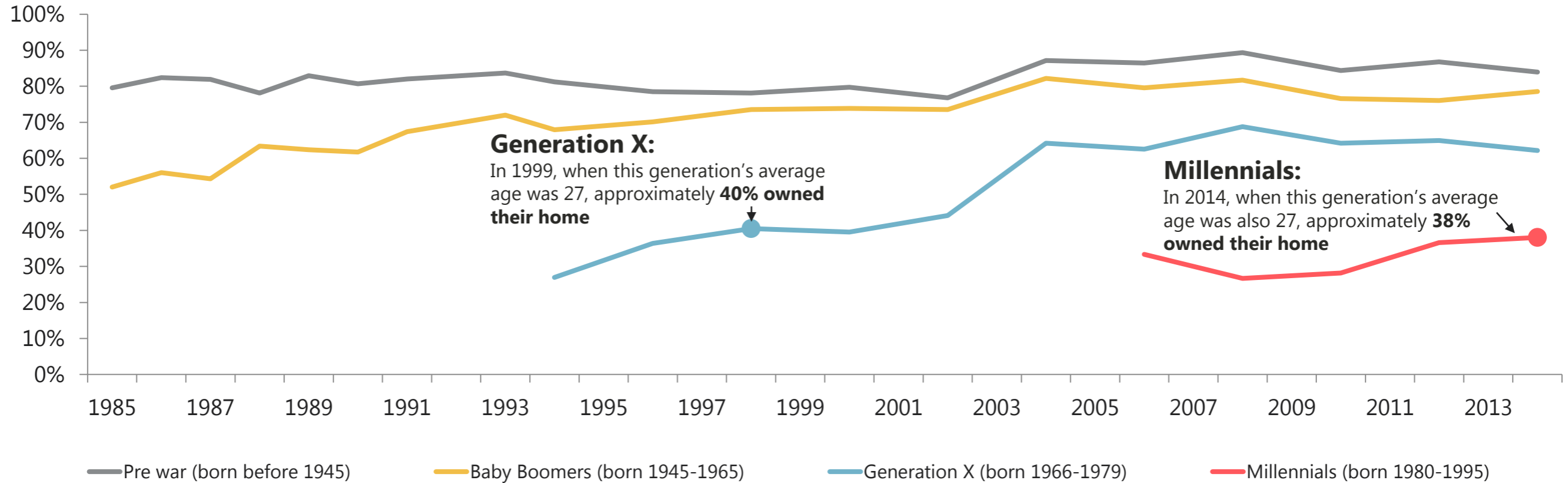
# MILLENNIALS IN BRITAIN ARE MUCH LESS LIKELY TO OWN THEIR OWN HOME

% living independently who own their own home/paying off a mortgage



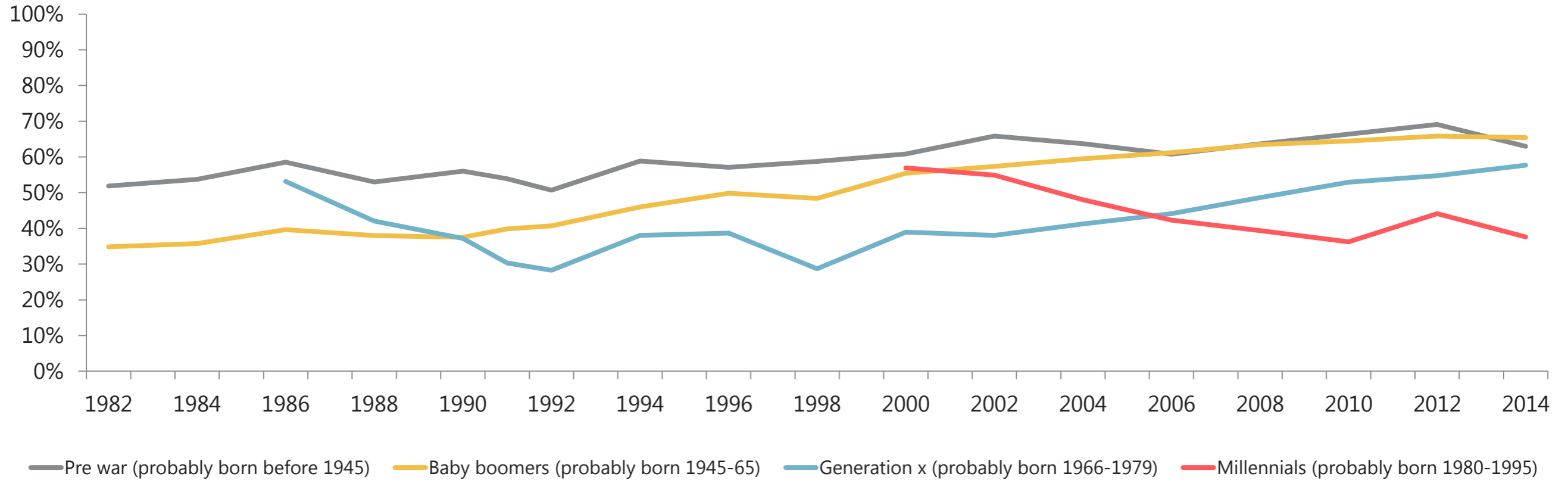
# GENERATION GAP IN HOMEOWNERSHIP IS LESS IN THE U.S. BUT STILL THERE

% living independently who own their own home/paying off a mortgage



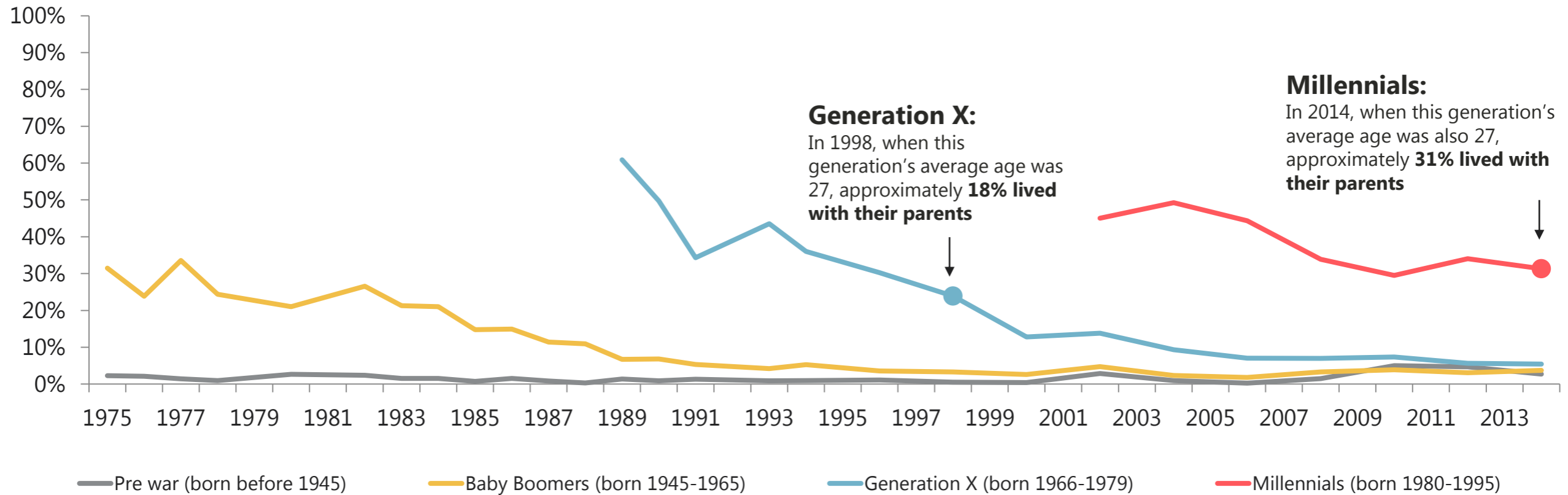
# MILLENNIALS IN GERMANY ARE ON A SIMILAR PATH TO HOMEOWNERSHIP TO GENERATION X

% home or flat owner



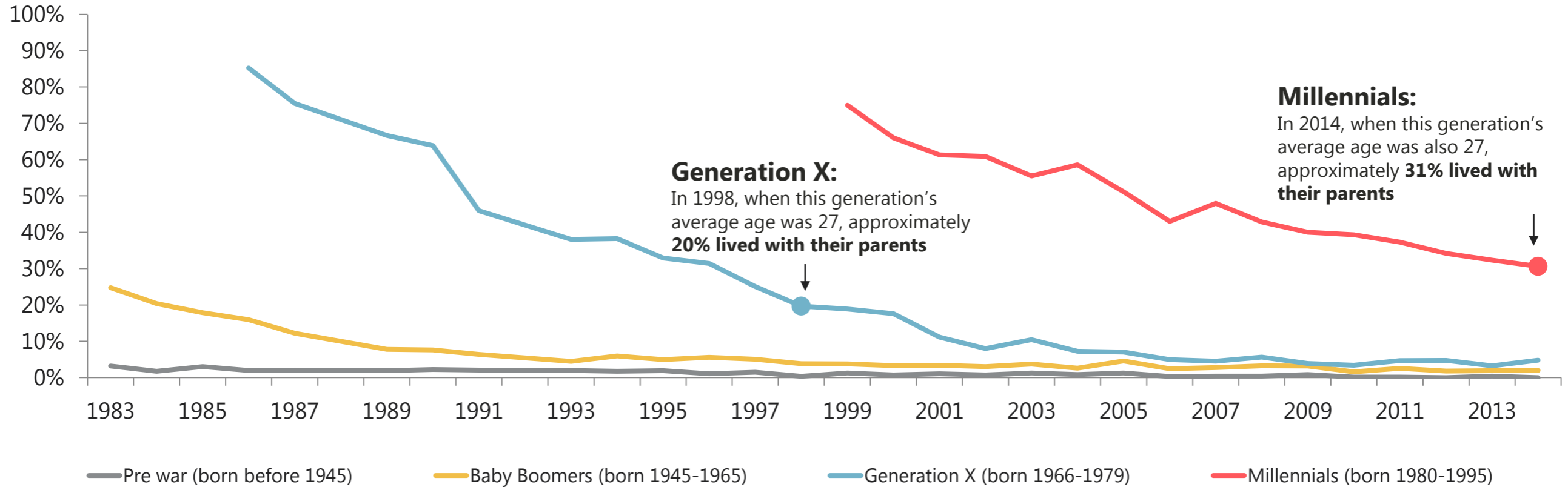
# MILLENNIALS IN THE US ARE MUCH MORE LIKELY TO LIVE AT HOME

% living with parents



# THE SAME SHIFT CAN BE SEEN IN BRITAIN

% living with parents



# 4.

## EDUCATION

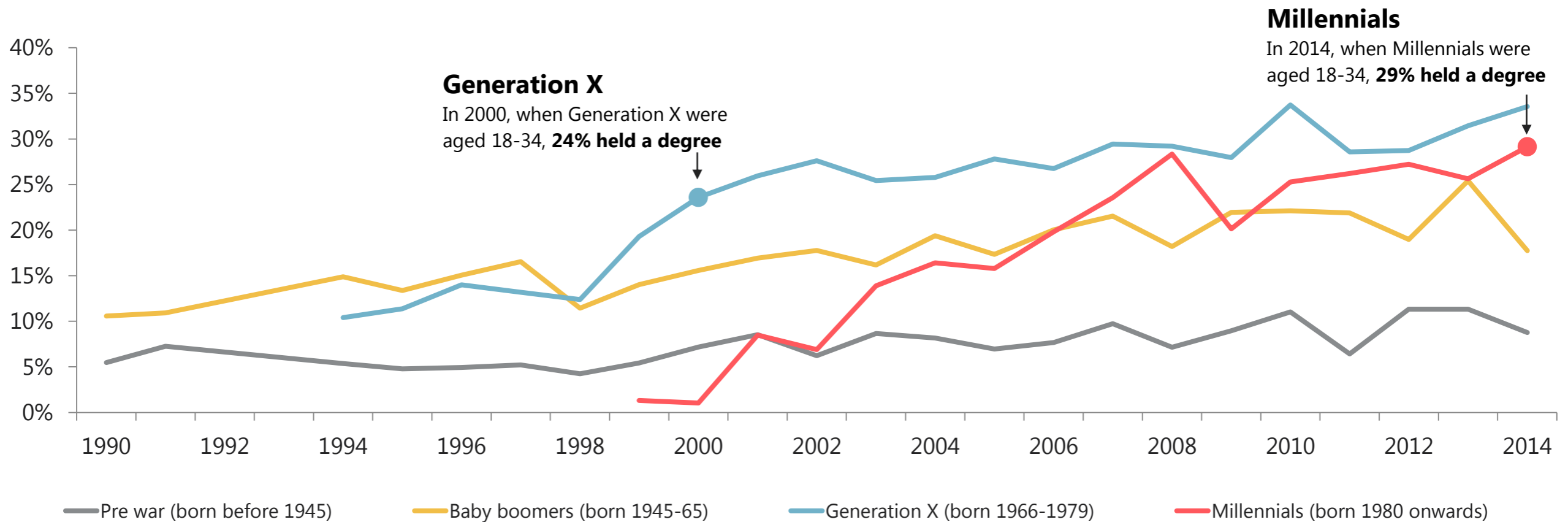


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# MILLENNIALS IN BRITAIN WILL BE THE BIGGEST GROUP OF DEGREE-HOLDERS

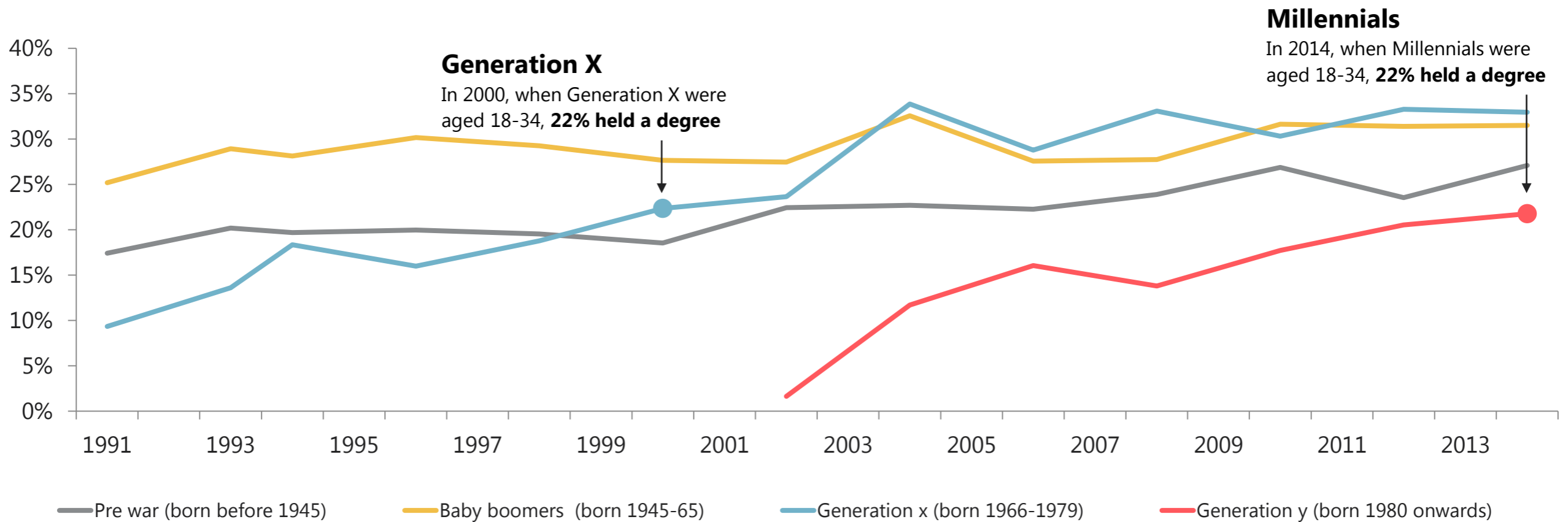
% who hold a degree

G.B.



# WHEREAS IN THE US THEY ARE FOLLOWING GENERATION X'S LEAD

% who hold a degree





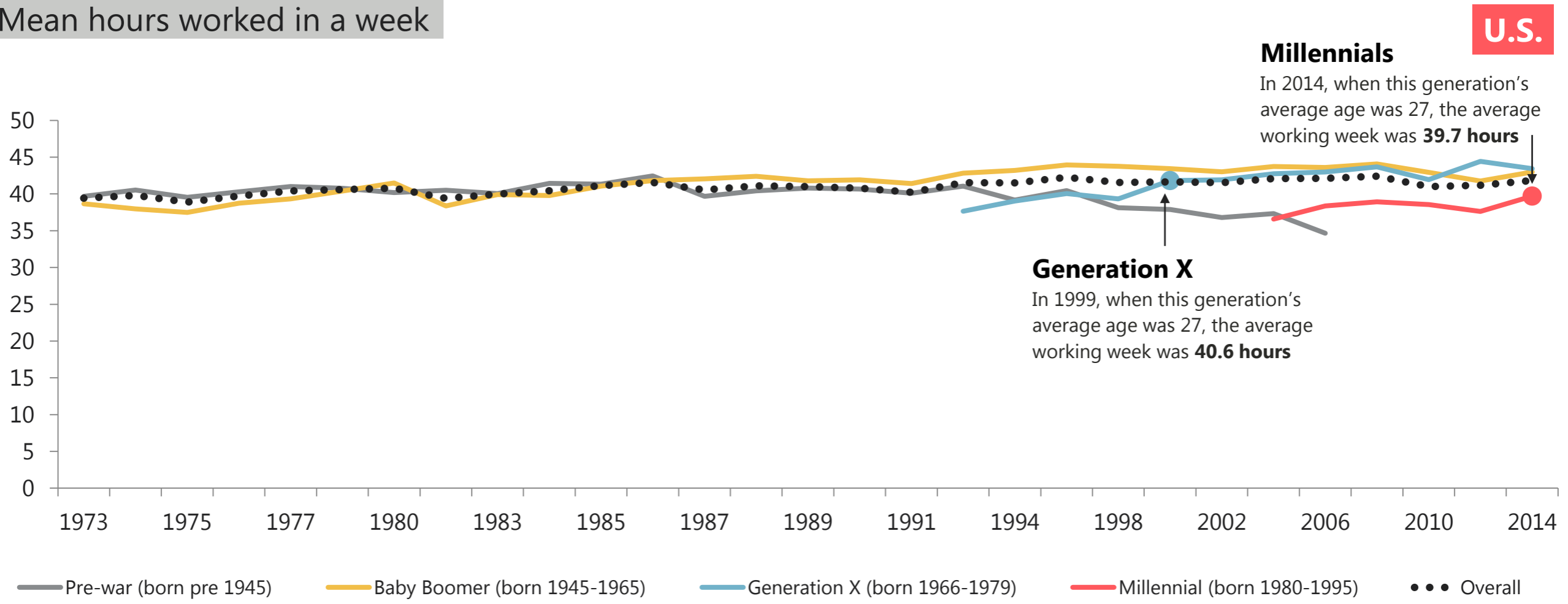
# 5.

# WORK



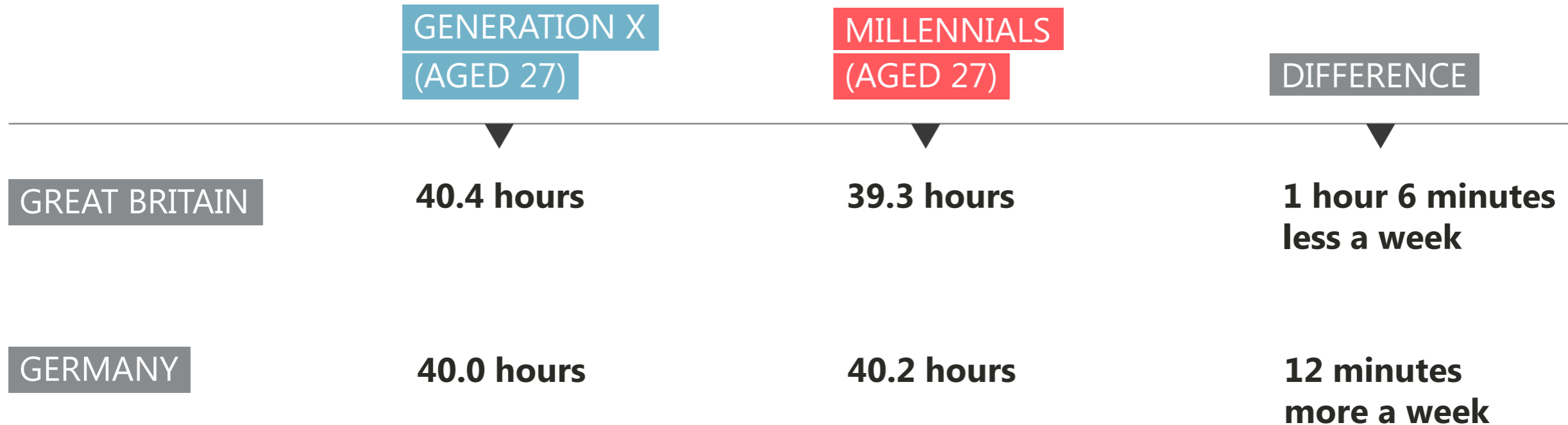
# US MILLENNIALS WORK SLIGHTLY FEWER HOURS PER WEEK THAN GENERATION X AT EQUIVALENT POINT

Mean hours worked in a week



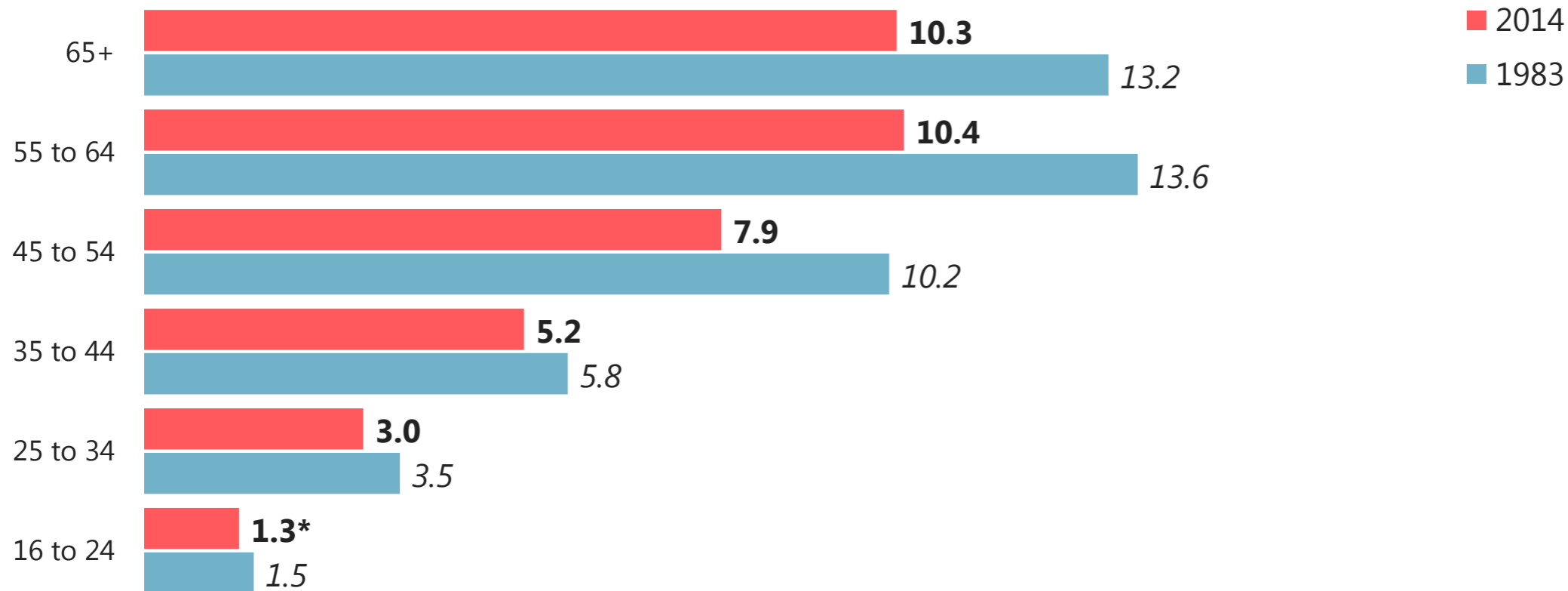
# ALSO A SLIGHTLY SHORTER WORKING WEEK FOR MILLENNIALS IN BRITAIN- NO DIFFERENCE IN GERMANY

Mean hours worked in a week



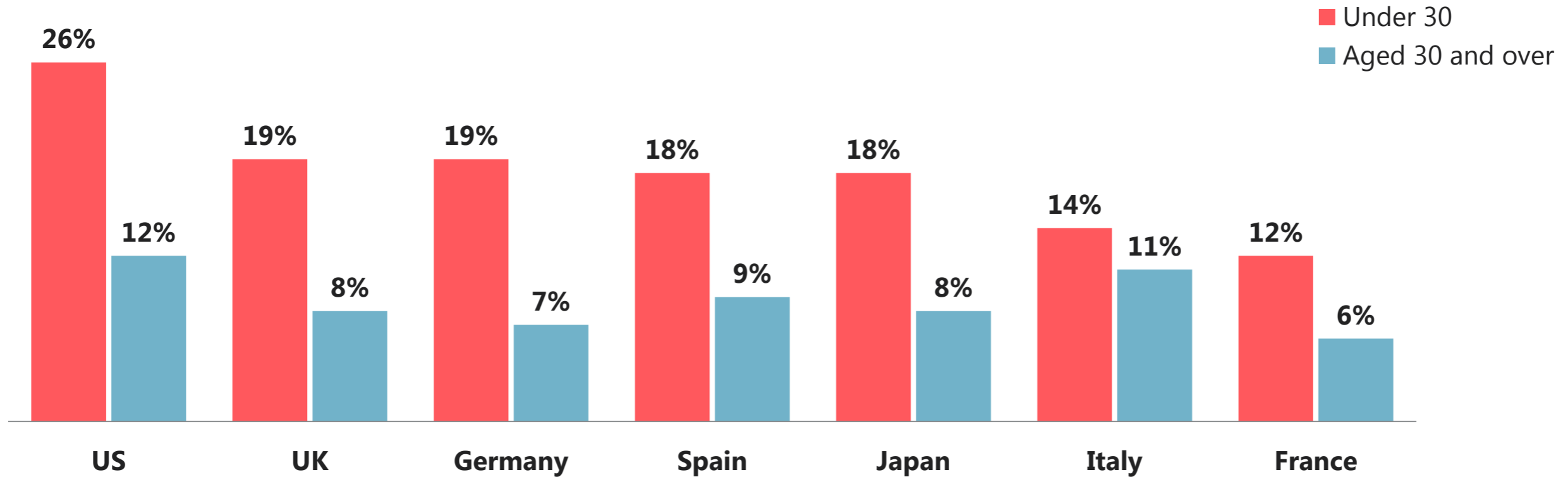
# IT'S THE OLDER GENERATIONS WHO ARE JOB HOPPING MORE THAN PREVIOUSLY -US

Median years of tenure with current employer



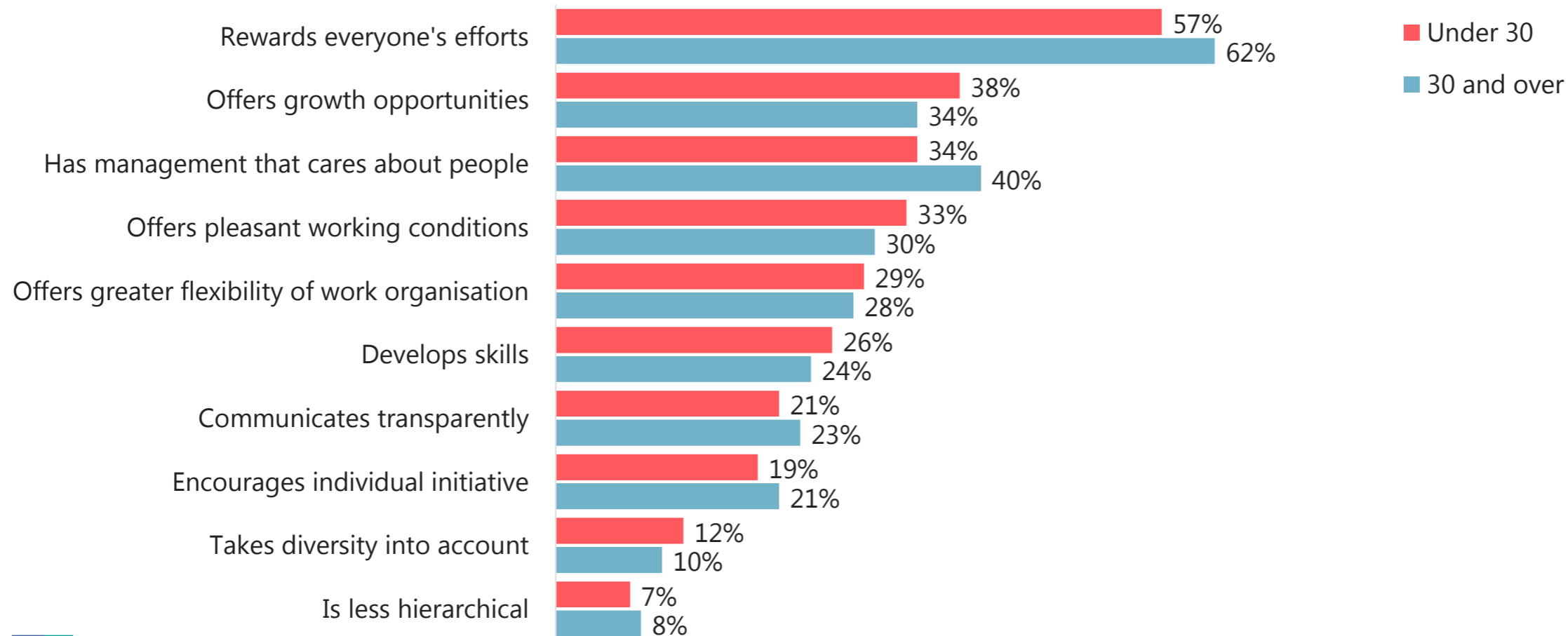
# YOUNGER WORKERS HAVE GREATER MOTIVATION

% say have increasing motivation at work



# MILLENNIALS WANT THE SAME THINGS FROM THEIR EMPLOYER AS OLDER WORKERS

## Main qualities of an ideal company



# 6.

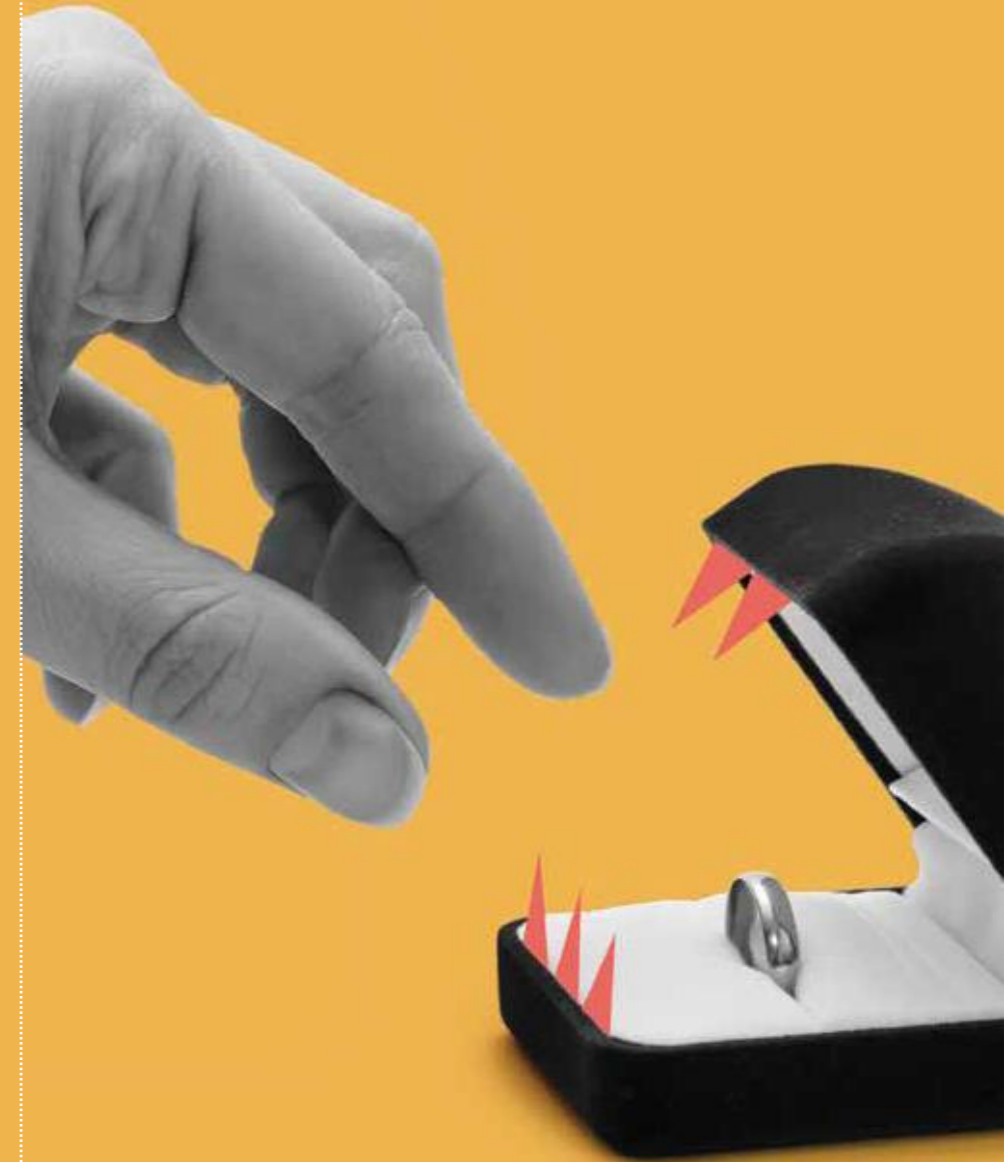
SEX

&

MARRIAGE

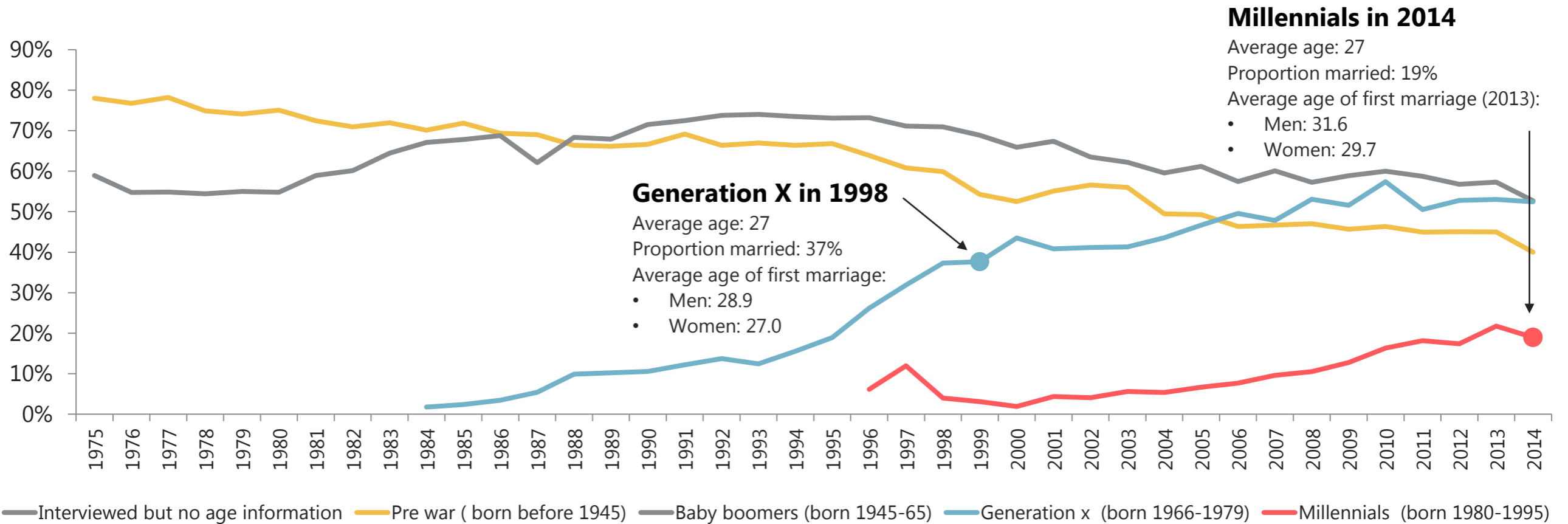


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# FEWER MILLENNIALS ARE MARRIED, BUT THE AVERAGE AGE OF MARRIAGE HAS RISEN - UK

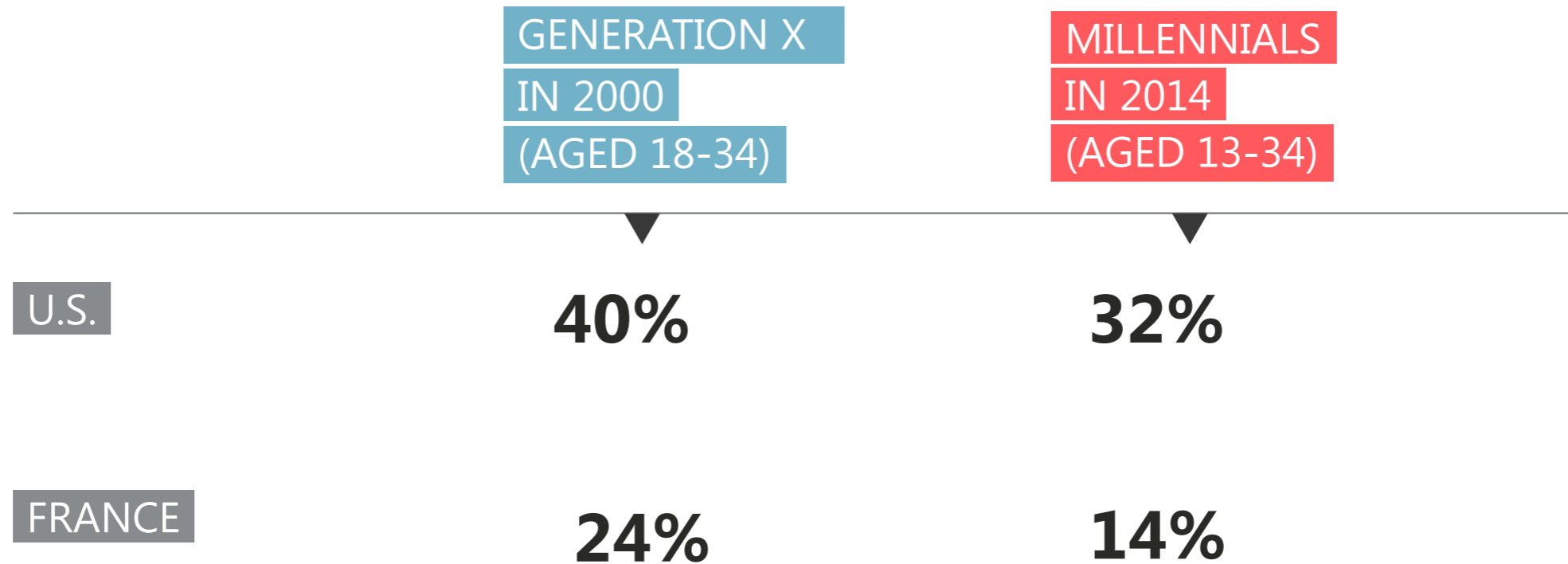
% who are married





# SAME PATTERN IN THE US AND FRANCE

% who are married



# THE AGE OF MARRIAGE HAS INCREASED WORLDWIDE

% mean age at first marriage by country

	GENDER	MEAN AGE OF MARRIAGE (1980-1)	MEAN AGE OF MARRIAGE (2010-12)	DIFFERENCE (YEARS)
<b>Hungary</b>	Men	24.8	34.0	+9.2
	Women	21.0	31.8	+10.8
<b>France</b>	Men	25.1	33.6	+8.5
	Women	23.0	32.0	+9
<b>Sweden</b>	Men	26.2	33.2	+7
	Women	23.6	31.2	+7.6
<b>Brazil</b>	Men	25.5	31.9	+6.4
	Women	22.7	29.7	+7
<b>UK</b>	Men	24.5	31.4	+6.9
	Women	22.3	29.3	+7
<b>Australia</b>	Men	25.7	31.4	+5.7
	Women	23.5	29.9	+6.4
<b>S Africa</b>	Men	27.8	31.2	+3.4
	Women	25.7	28.0	+2.3
<b>Japan</b>	Men	28.7	31.2	+2.5
	Women	25.1	29.7	+4.6
<b>Rwanda</b>	Men	25.0	26.6	+1.6
	Women	16.7	24.4	+7.7
<b>Indonesia</b>	Men	24.1	25.7	+1.6
	Women	20.0	22.3	+2.3
<b>Ethiopia</b>	Men	23.8	25.7	+1.9
	Women	17.6	21.2	+3.6
<b>Mexico</b>	Men	24.1	25.5	+1.4
	Women	21.6	23.0	+1.4
<b>India</b>	Men	23.4	24.9	+1.5
	Women	18.7	20.6	+1.9

# AGE AT FIRST CHILDBIRTH

## AGE AT FIRST CHILDBIRTH (WOMEN)

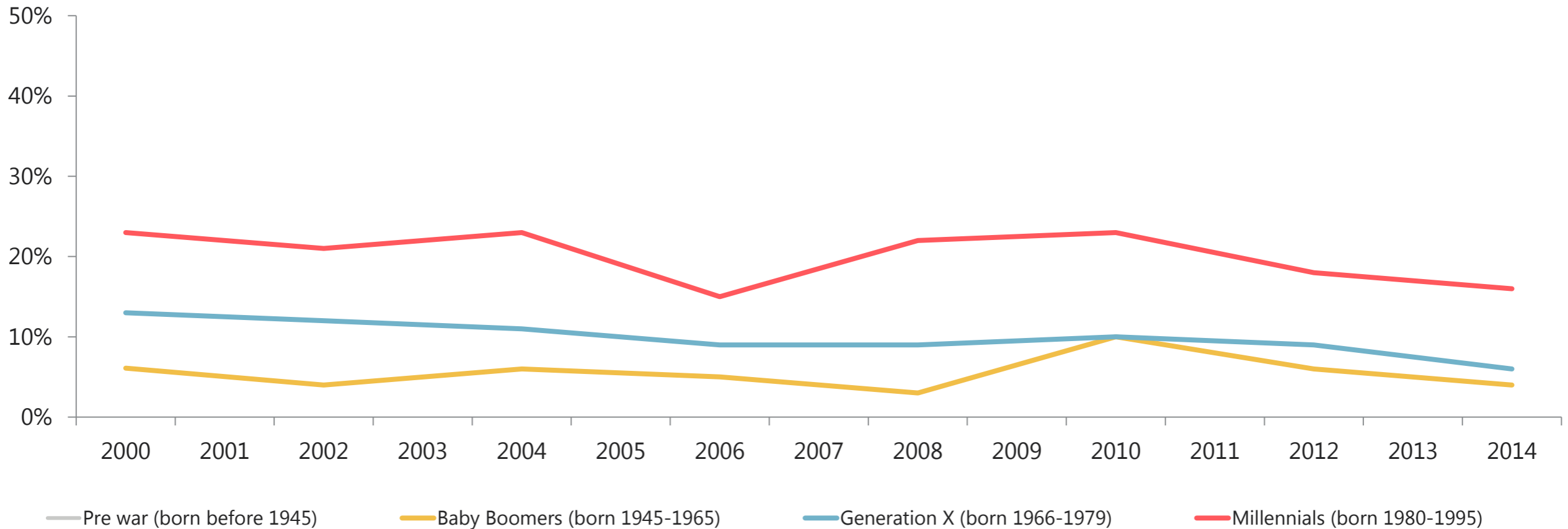
US	UK	Germany	France	S Korea	Australia
25.6	28.1	29.2	28.1	31.0	30.5

## DISTANCE FROM MILLENNIAL GENERATIONAL MIDPOINT (29 YEARS)

-3.3	-0.9	+0.2	-0.9	+2.0	+1.5
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# MILLENNIALS ARE MORE LIKELY TO HAVE MULTIPLE SEXUAL PARTNERS - US

% had sex with three or more people in last year



# BUT MILLENNIALS ARE ALSO MORE LIKELY TO BE ABSTINENT - US

% haven't had sex in past four weeks

GENERATION X  
IN 2000  
(Average age 27)

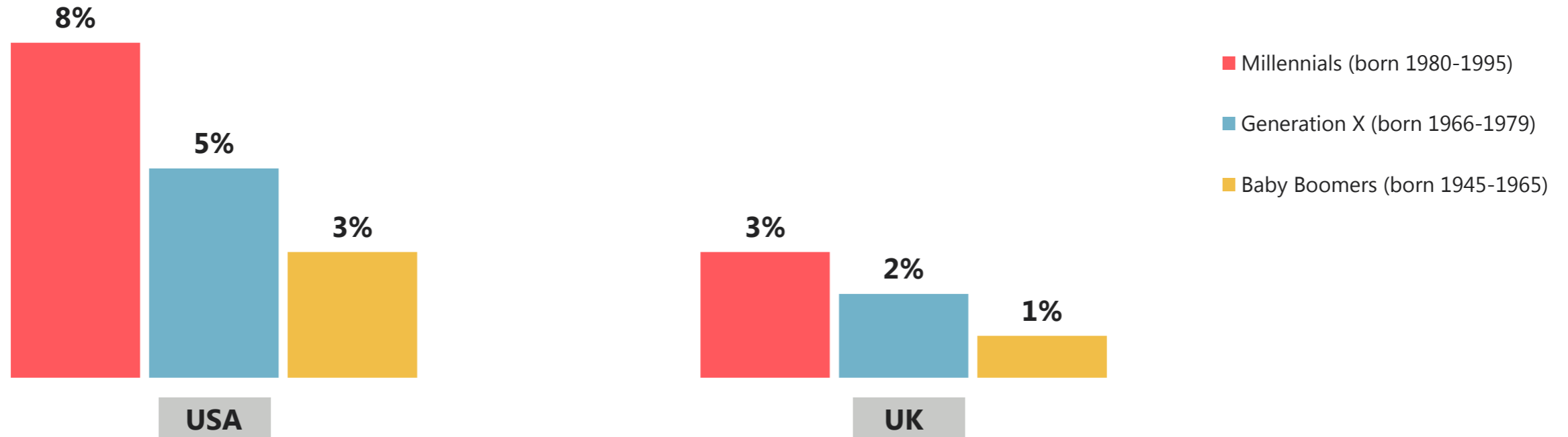
19%

MILLENNIALS  
IN 2014  
(Average age 27)

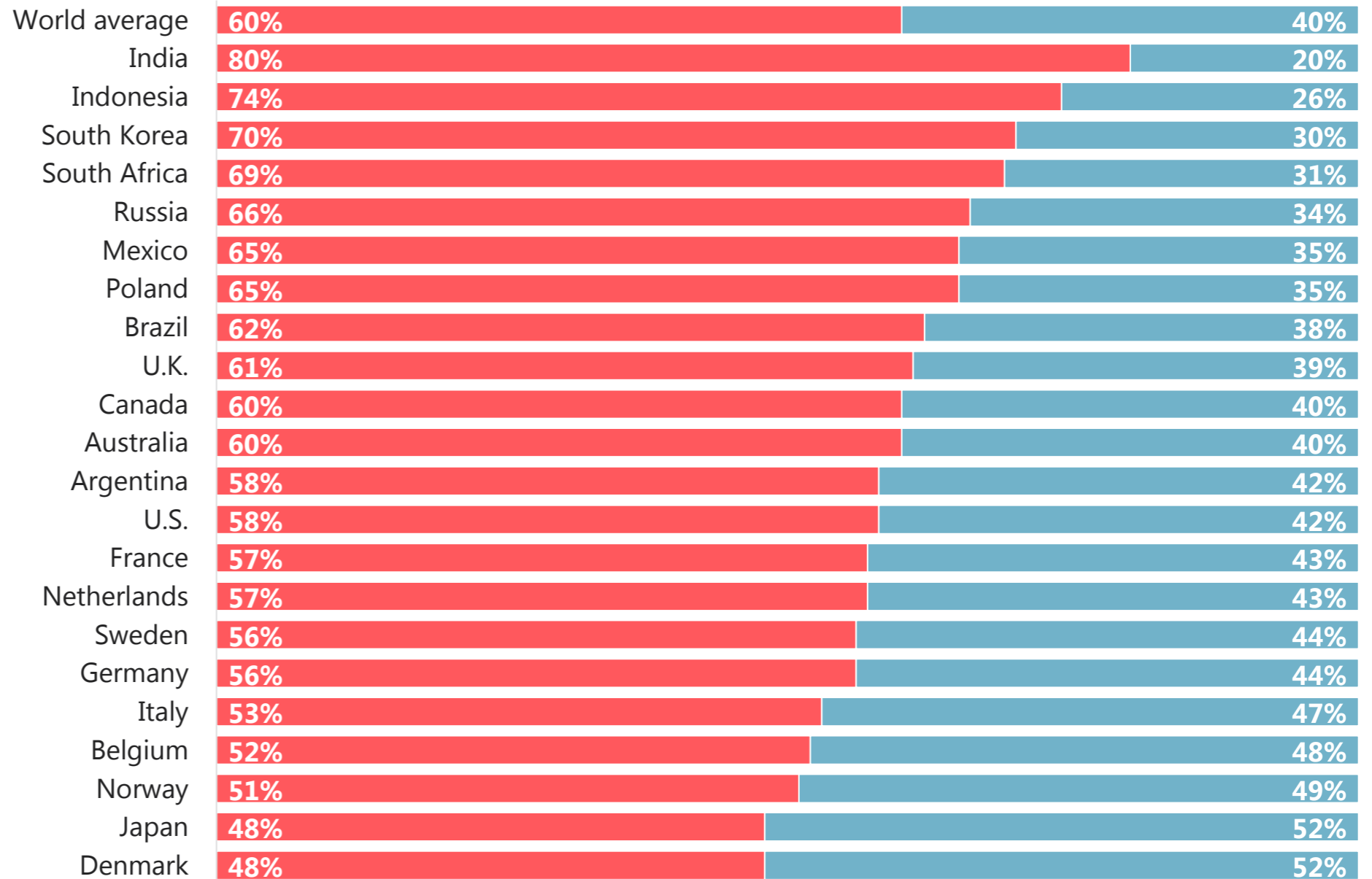
32%

# MILLENNIALS ARE MORE LIKELY TO IDENTIFY AS GAY OR BISEXUAL

% identifying as gay, lesbian or bisexual



# MILLENNIALS MAKE UP 60% OF PORNHUB'S USERBASE



■ Millennials ■ Older generations

# 7.

## TECHNOLOGY

&

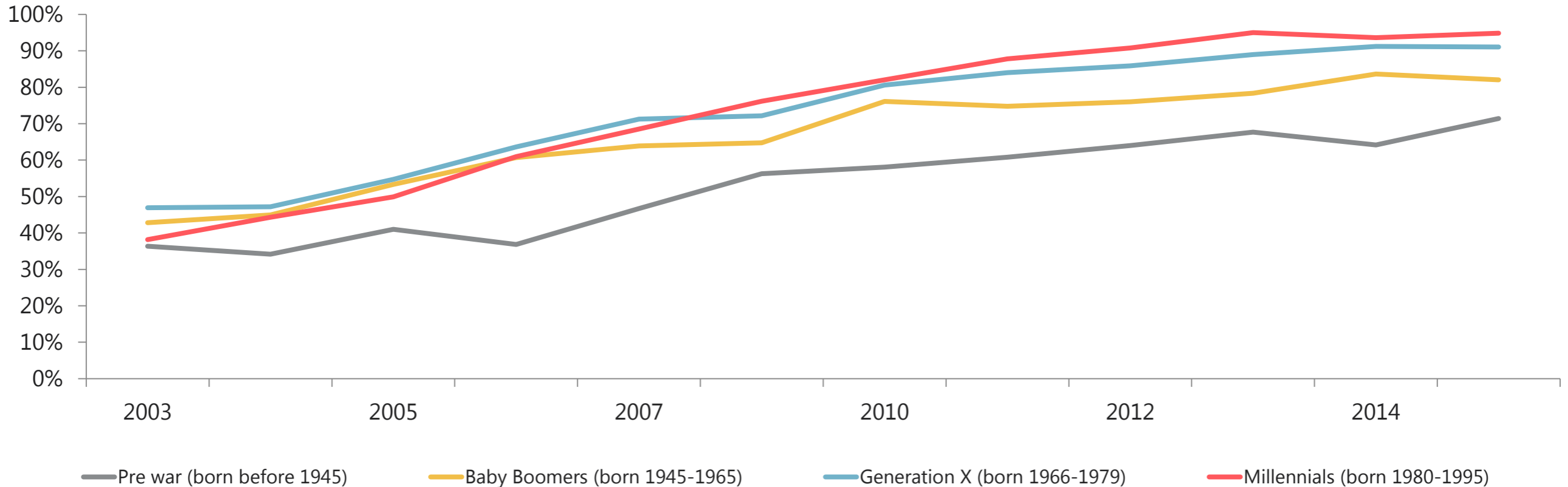
## MEDIA





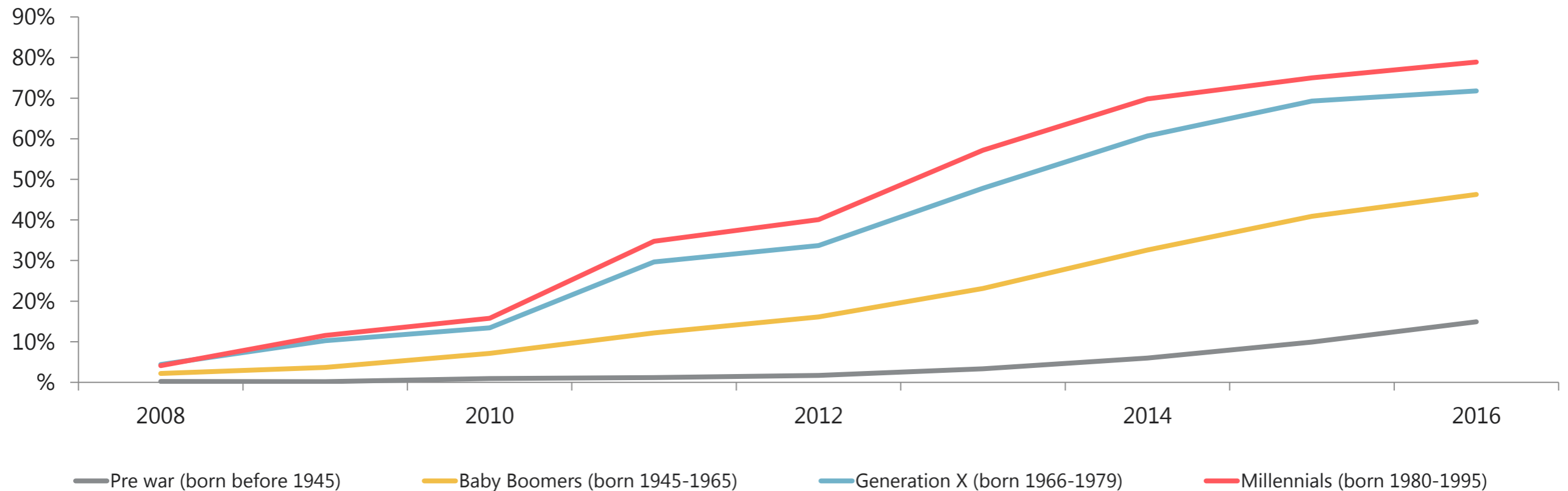
# FREQUENCY OF INTERNET USE HAS RISEN DRAMATICALLY ACROSS ALL GENERATIONS - UK

% using internet every day/almost every day



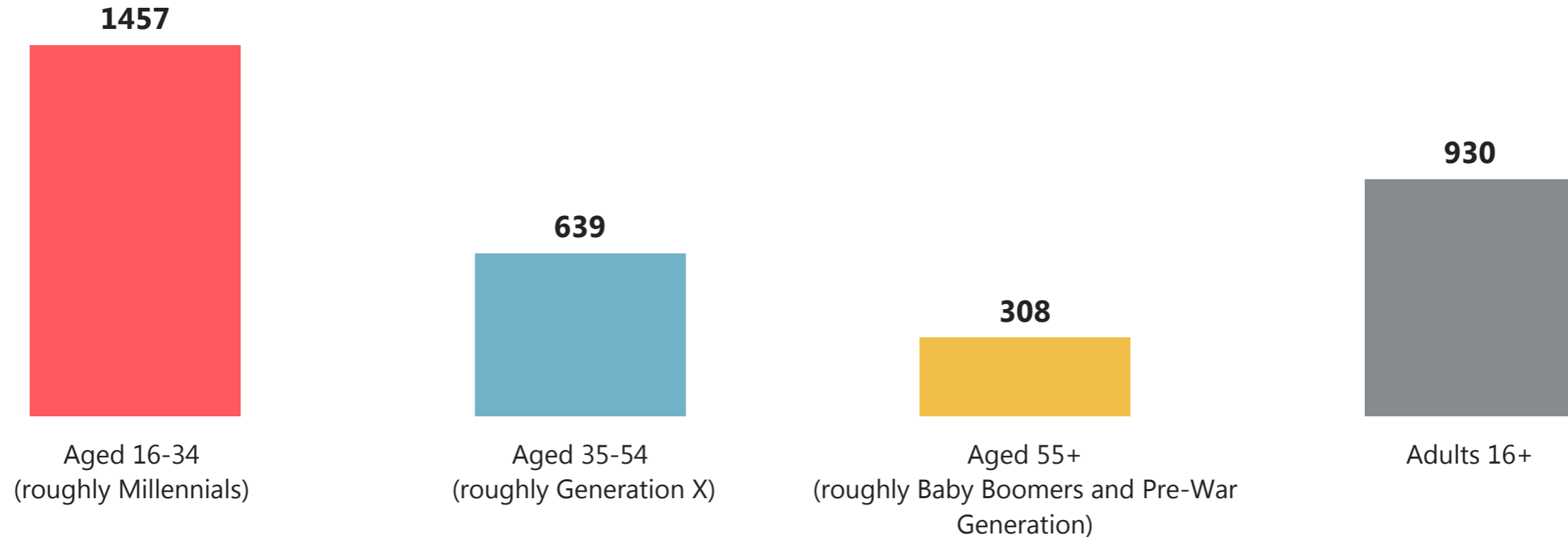
# ADOPTION RATES OF MOBILE INTERNET SIMILAR FOR MILLENNIALS AND GENERATION X - GB

% accessing internet via mobile phone



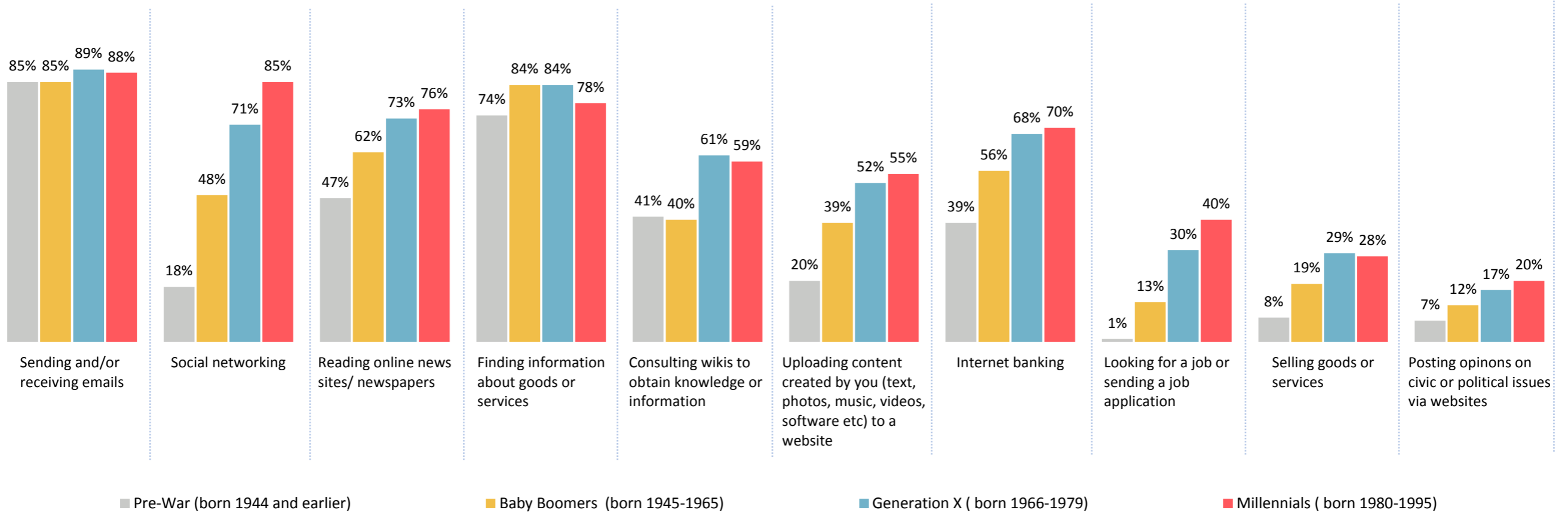
# MILLENNIALS SPEND 24 HOURS A WEEK ON THEIR SMARTPHONES -UK

Number of minutes spent on a smart phone per week



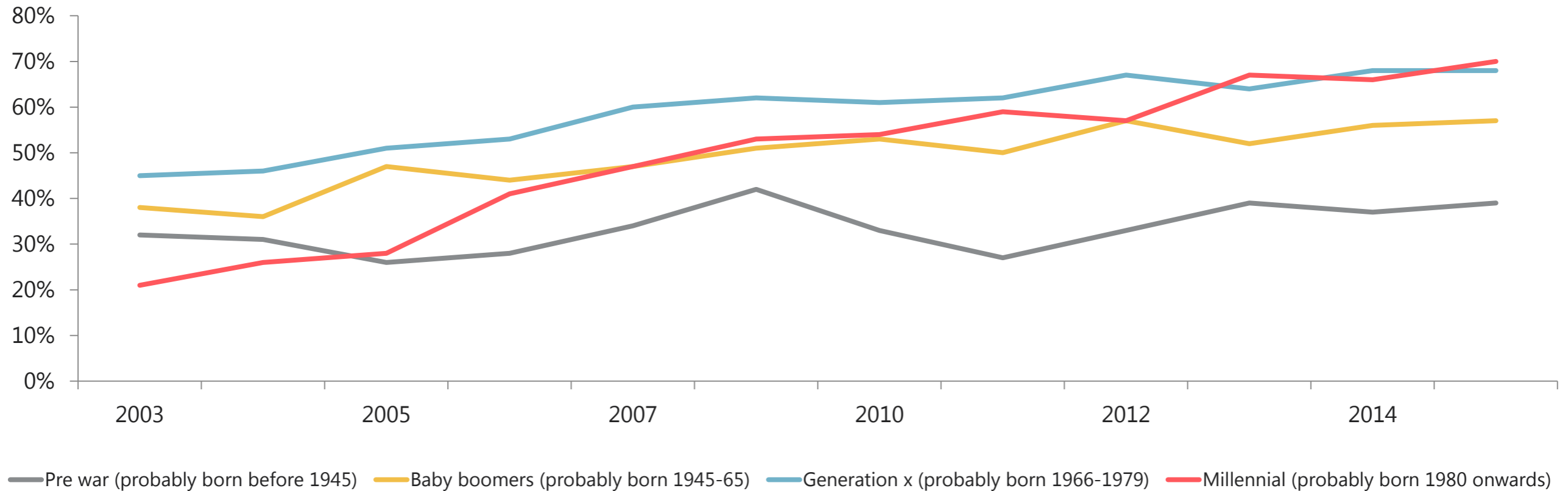
# HOW GENERATIONS USE THE INTERNET IS CONNECTED TO LIFE STAGE - UK

% doing each activity in the last three months



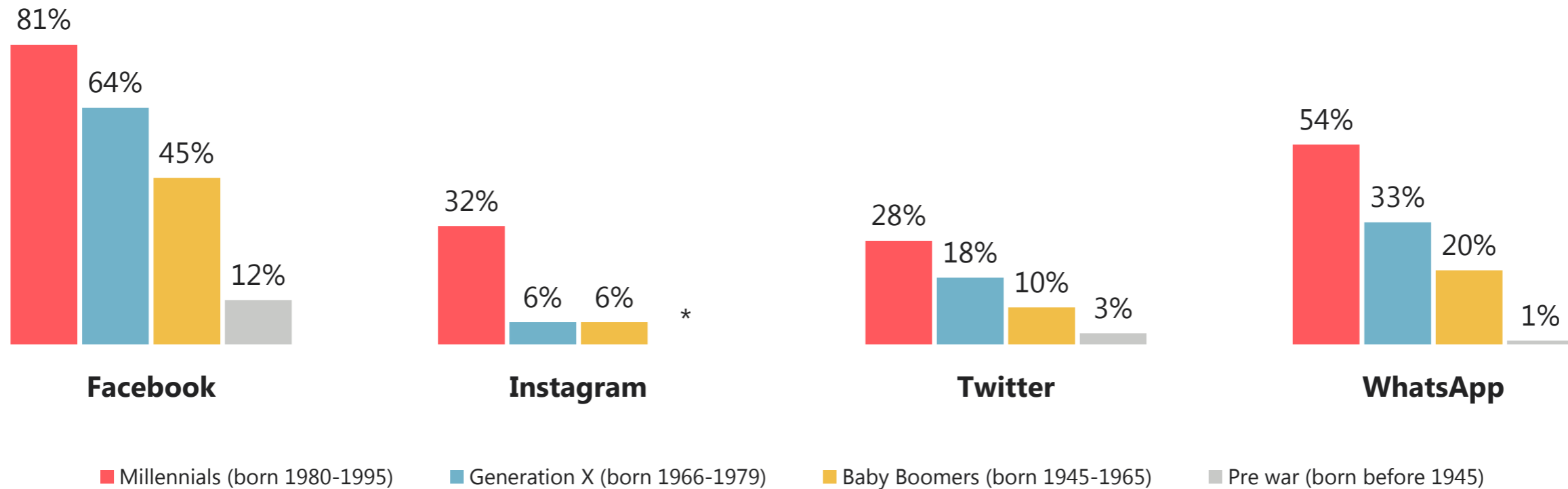
# MILLENNIALS HAVE GROWN UP AND ARE USING INTERNET BANKING - UK

% used internet banking in past 3 months



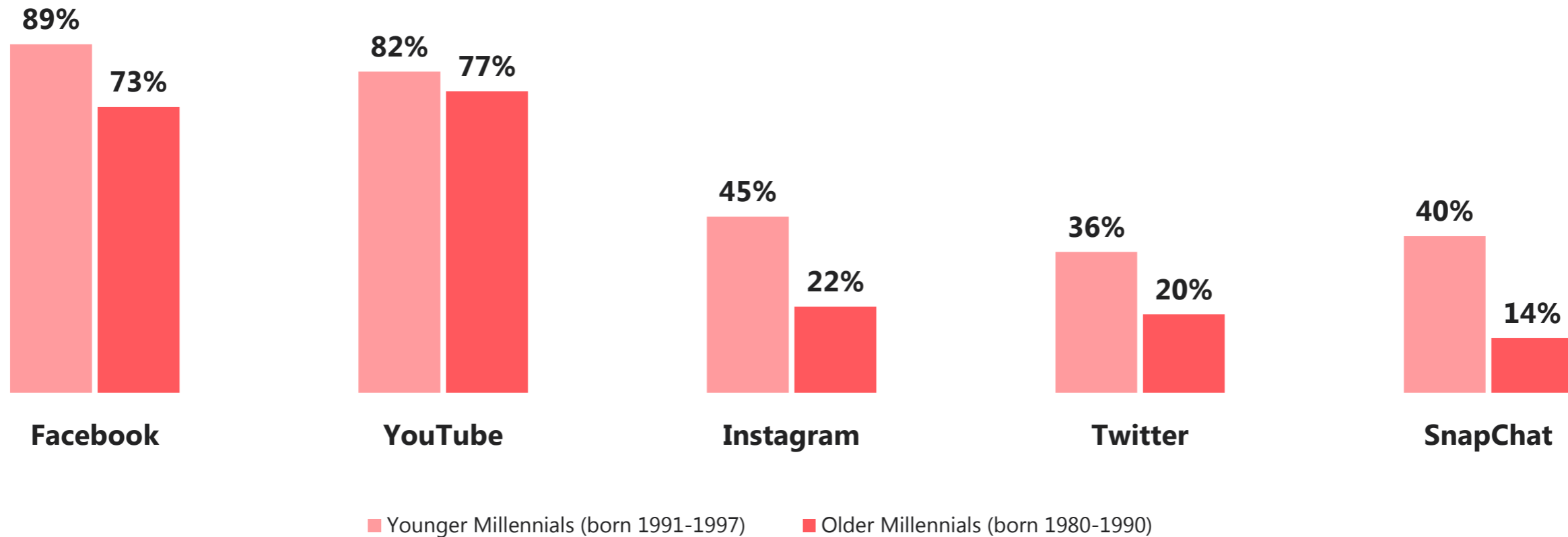
# FACEBOOK HAS USERS OF ALL AGES – WHATSAPP AND INSTAGRAM ARE MORE “MILLENNIAL” - GB

% who use each social network



# BUT THERE ARE DIFFERENCES WITHIN THE MILLENNIAL GENERATION - GB

% who use each social network



# ALL EXCEPT OLDEST AGE GROUP WATCH LIVE TV LESS

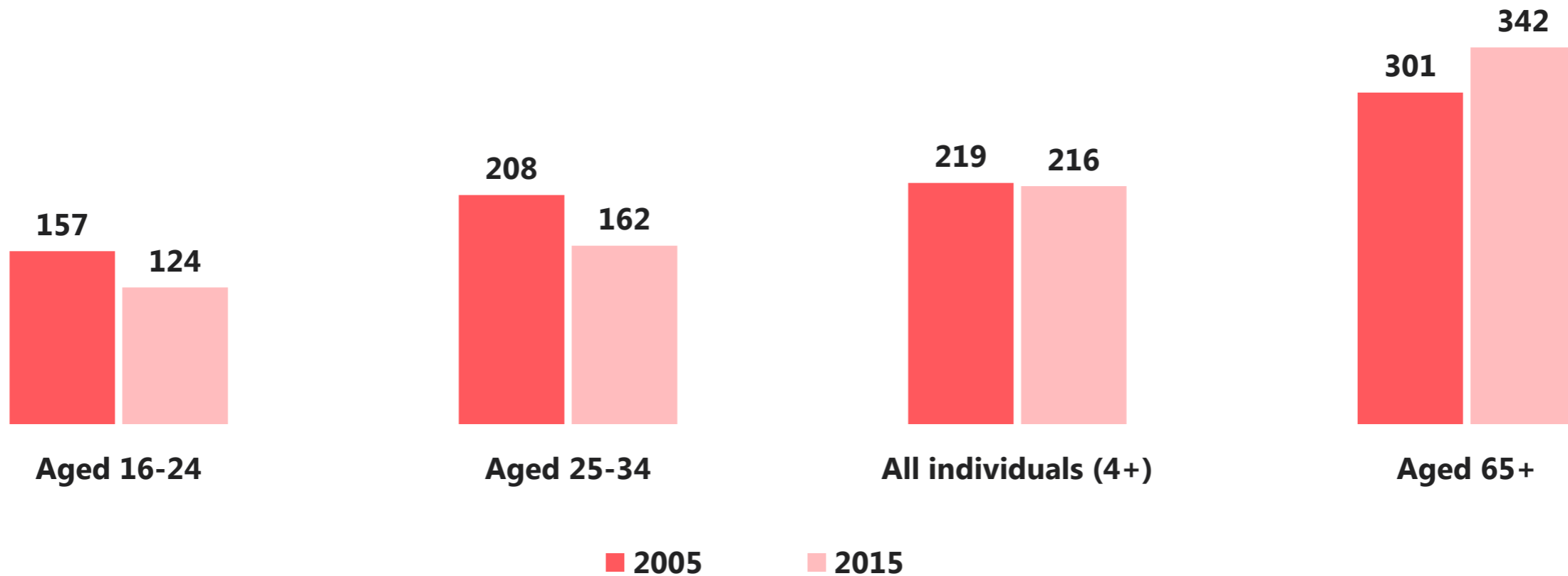
% change in live TV watching, 2014- 2015

Total household viewing aged 4+	Adults 16- 24	Adults 25- 34	Adults 35- 44	Adults 45- 54	Adults 55- 64	Adults 65+
<b>-1.9%</b>	<b>-10.5%</b>	<b>-4.2%</b>	<b>-2.4%</b>	<b>-2.2%</b>	<b>-0.6%</b>	<b>+0.5%</b>



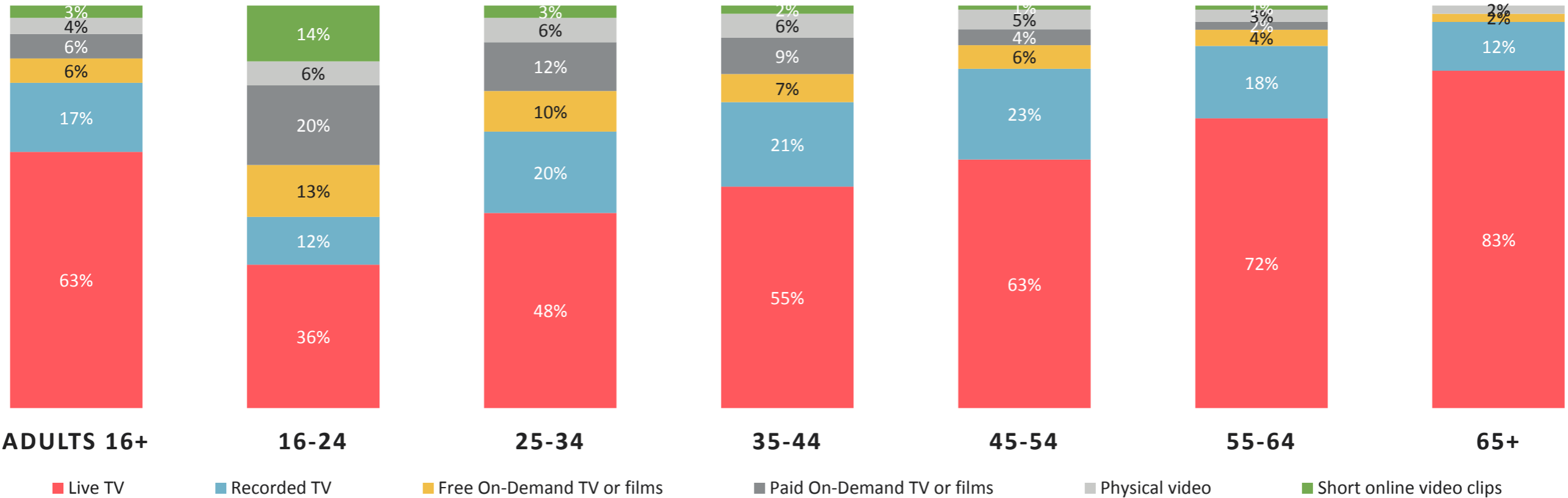
# LIVE TV WATCHING HAS DECLINED AMONG MILLENNIALS - UK

Average daily live TV watching in minutes



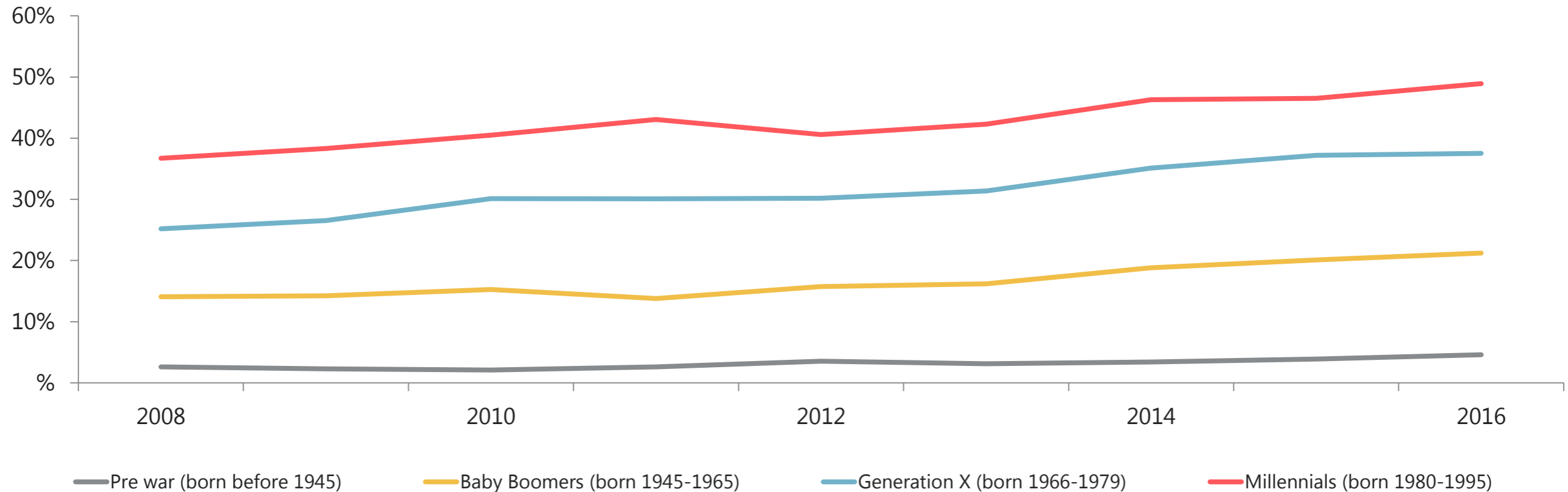
# MILLENNIALS WATCH MORE ONLINE AND ON DEMAND - UK

Time spent watching different types of media by age



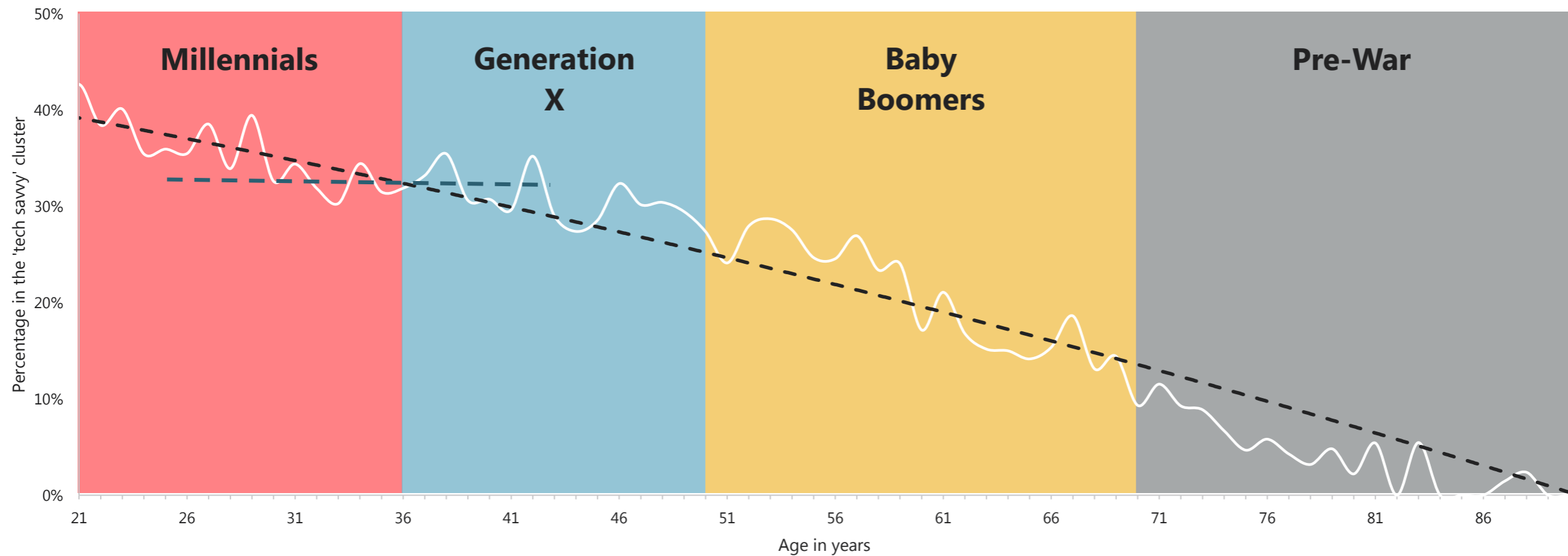
# ATTITUDES TO STREAMING APPEAR GENERATIONAL - GB

% have streamed music in past three months



# THERE IS NO 'SHELF' THAT DISTINGUISHES 'DIGITAL NATIVES' FROM THE REST

Proportion belonging to the most technical cluster by age



# 8.

# BRANDS

# &

# MARKETING

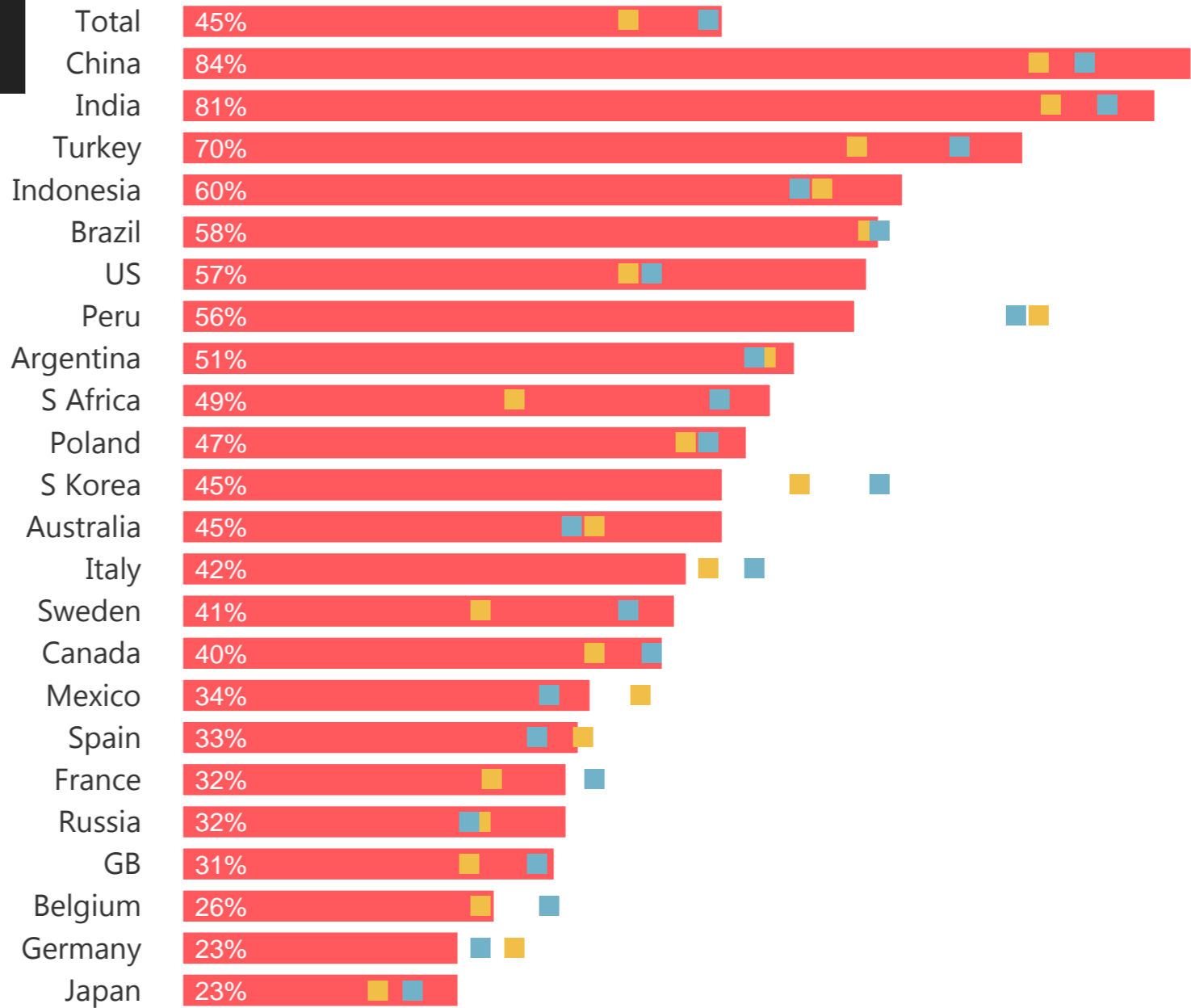


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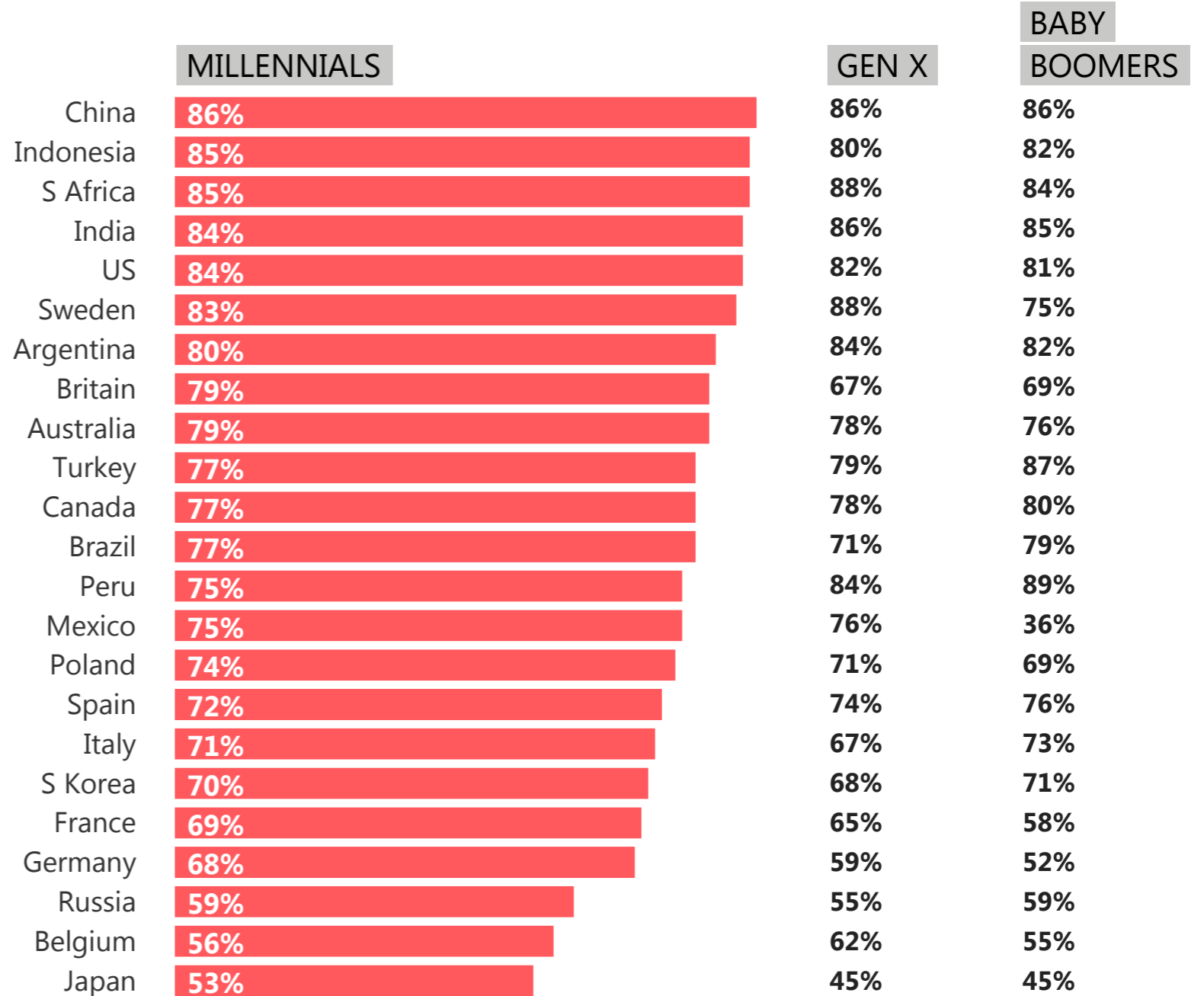
# VARIATION BETWEEN MARKETS ON IMPORTANCE OF BRANDS CAN DWARF DIFFERENCES BETWEEN GENERATIONS

% always try to buy branded products



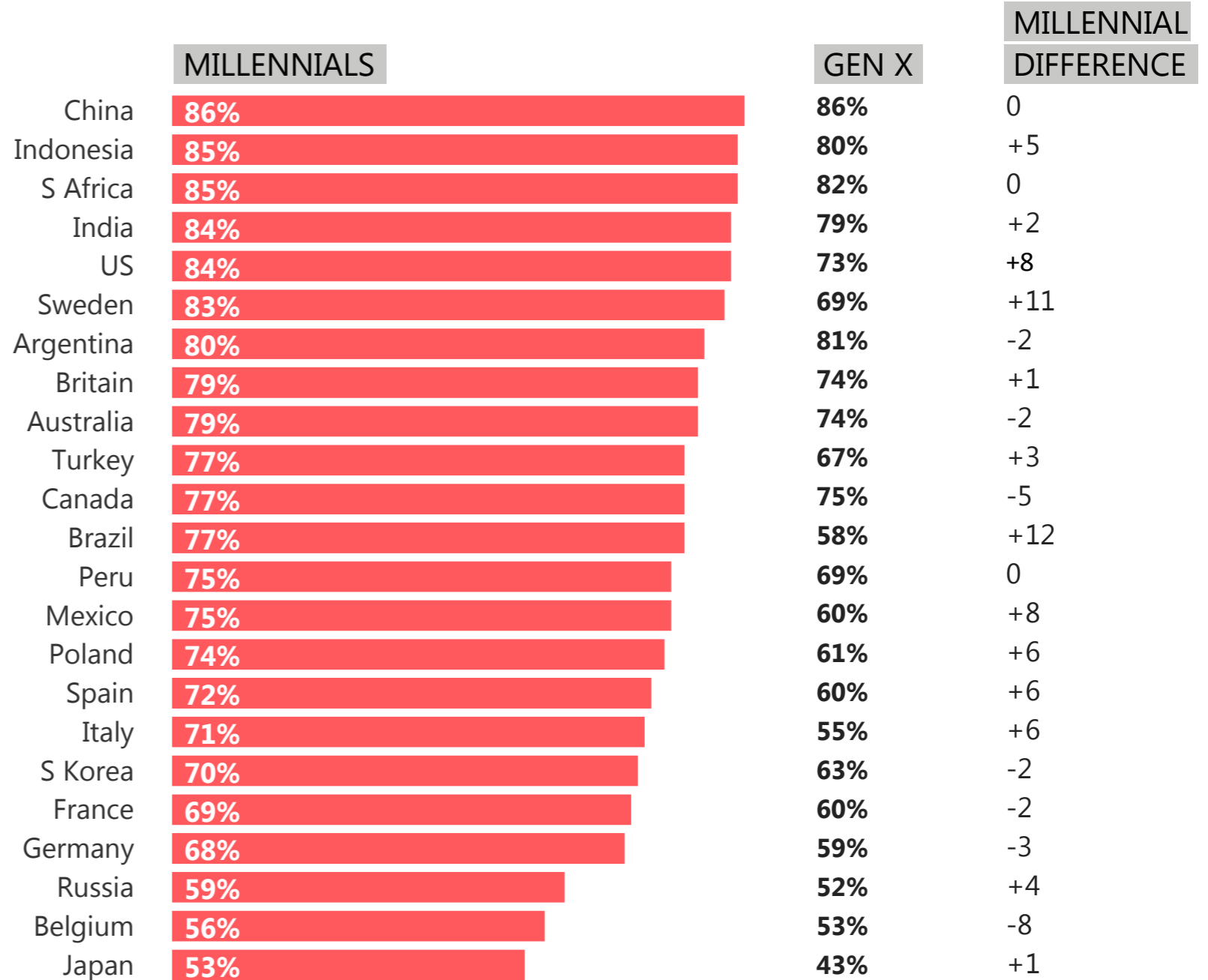
# NO REAL DIFFERENCE IN BRAND TRUST BETWEEN GENERATIONS

% more likely to trust a new  
product of a brand I already know



# MILLENNIALS IN SOME MARKETS ARE MORE LIKELY TO SAY CORPORATE RESPONSIBILITY IS IMPORTANT FOR BRAND CHOICE

% become increasingly important to me that brands I choose make a positive contribution to society beyond just providing goods, services and products



Base: 18,810 adults aged 16-64 in 23 countries, Sept – Oct 2016. | Source: Ipsos Global Trends Survey 2017



# MILLENNIALS ARE NO MORE LIKELY TO BOYCOTT AND GENERATION X WERE MORE LIKELY TO BUY ETHICAL PRODUCTS AT THE SAME AGE- GB

BOYCOTTED A PRODUCT

CHOSE A PRODUCT/SERVICE BECAUSE OF COMPANY'S RESPONSIBLE BEHAVIOUR

GENERATION X  
IN 1999

(When aged 20-33)

17%

17%

MILLENNIALS  
IN 2015

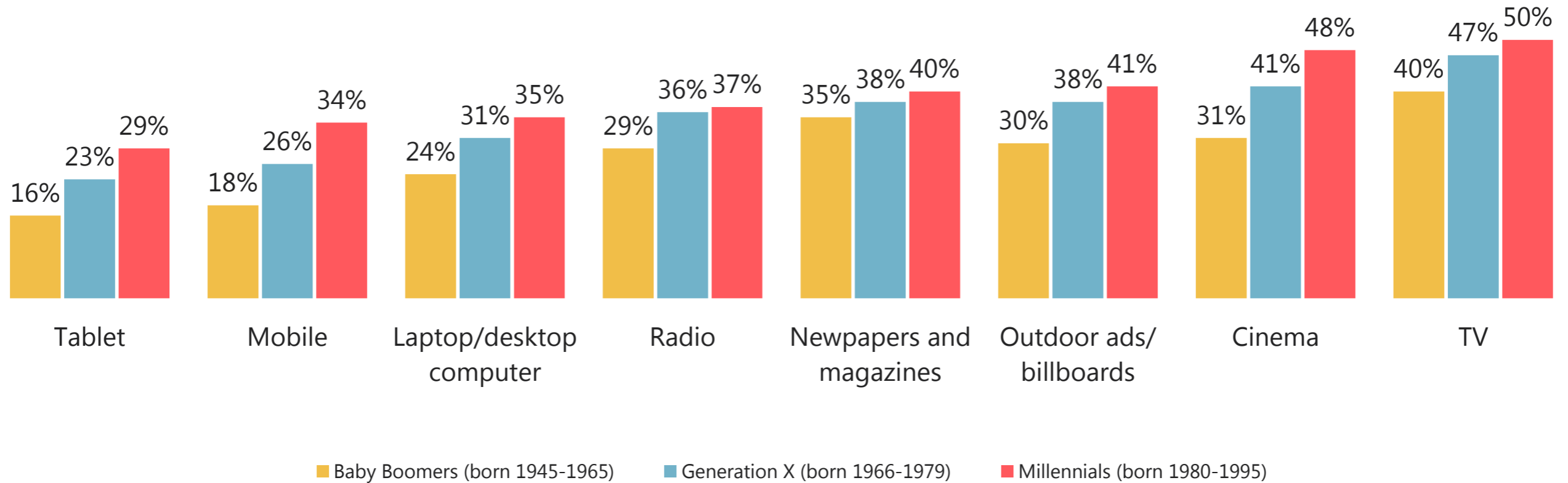
(When aged 21-35)

16%

12%

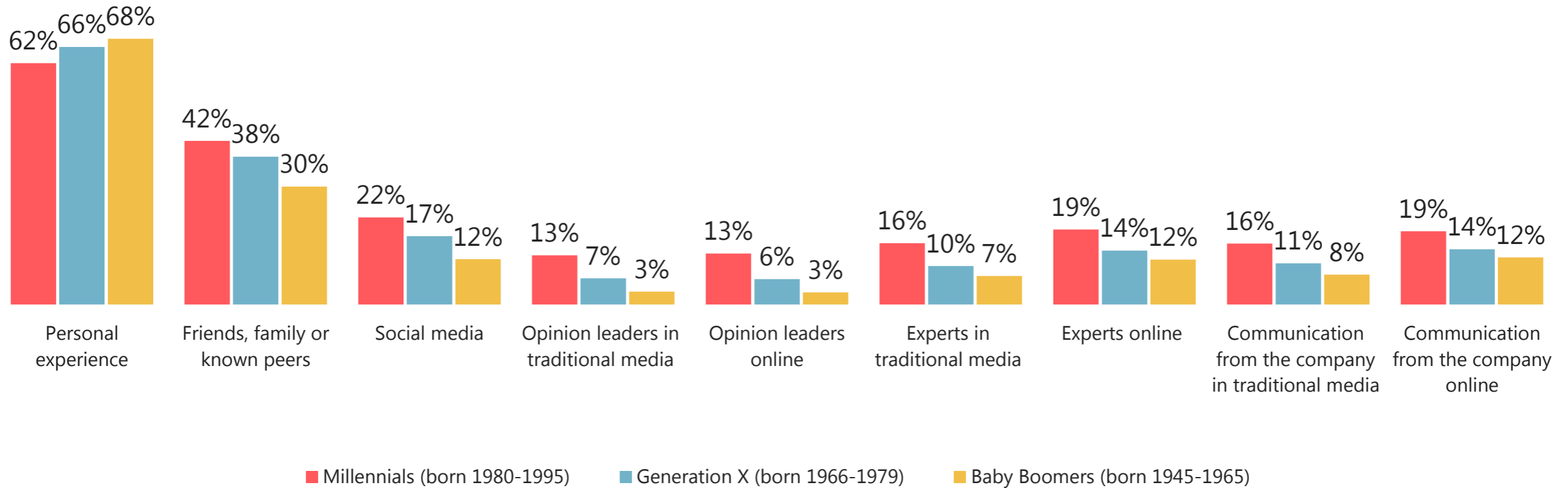
# MILLENNIALS MORE LIKELY TO PAY ATTENTION TO ADVERTS ACROSS ALL MEDIA - GB

% Pay a lot/a little attention



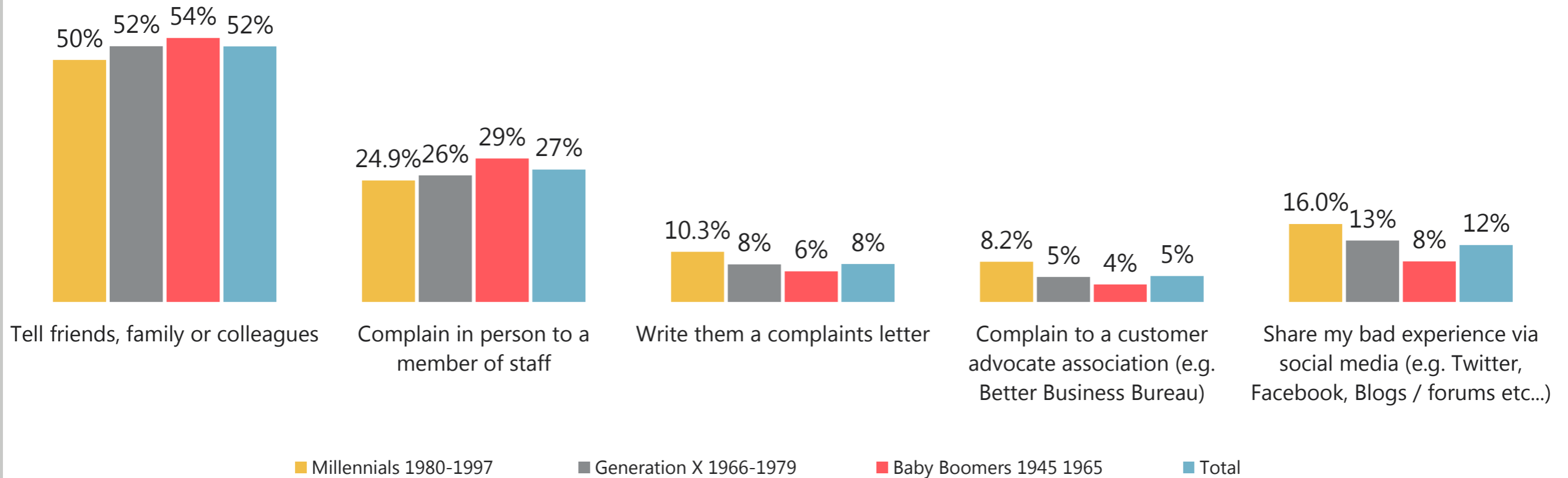
# MILLENNIALS MORE LIKELY TO BE INFLUENCED BY A VARIETY OF SOURCES -US

% influenced by source to choose or continue using brands



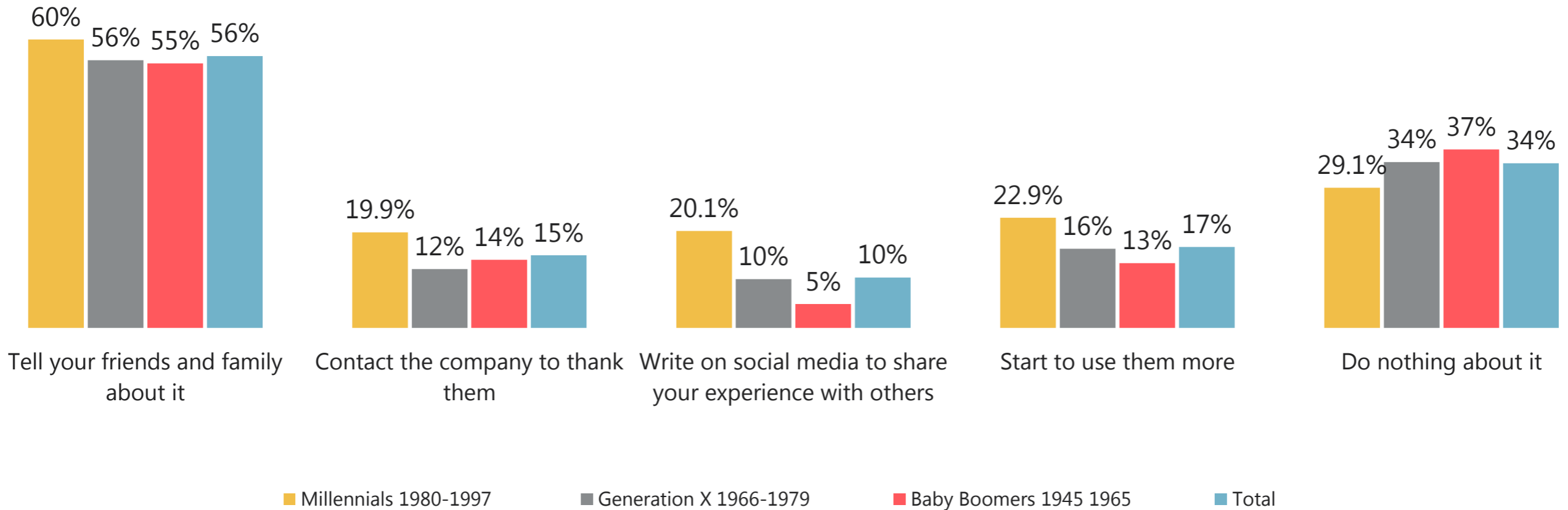
# MILLENNIALS ARE MORE LIKELY TO COMPLAIN AFTER A BAD EXPERIENCE WITH A COMPANY - US

% action after negative experience



# MILLENNIALS ARE ALSO MORE LIKELY TO GIVE POSITIVE FEEDBACK - US

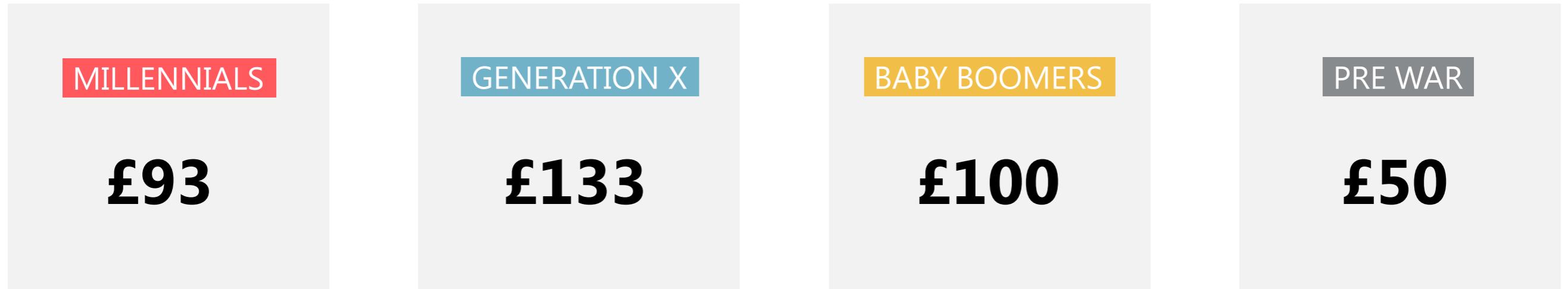
% action after positive experience



# GENERATION X SPEND

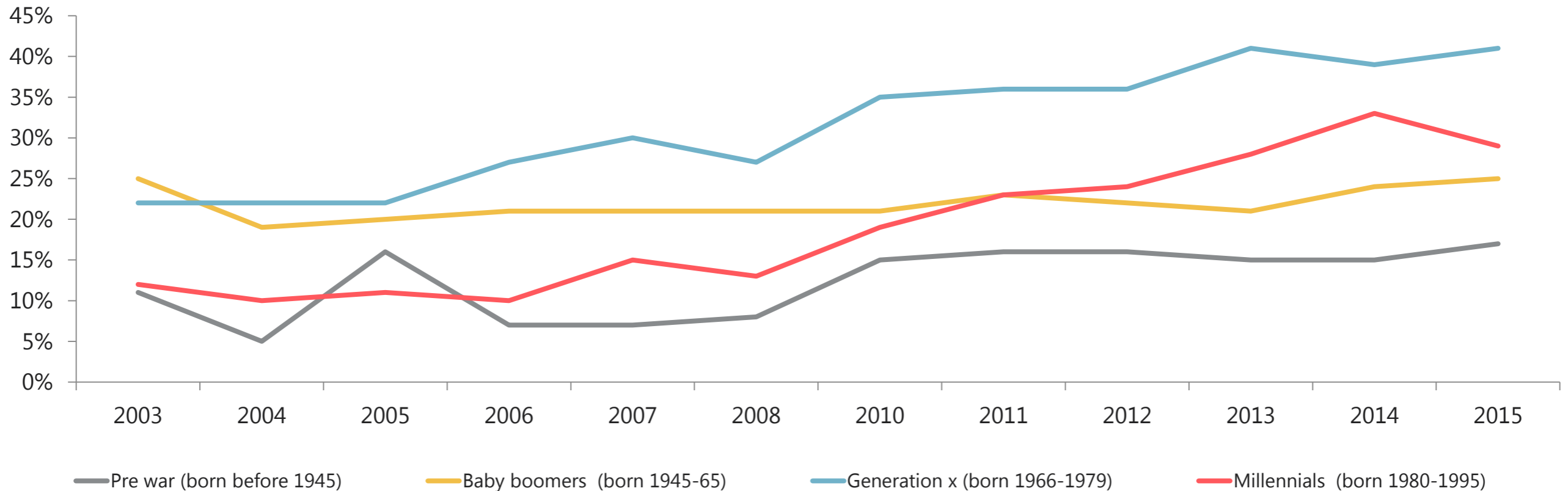
## THE MOST ONLINE - GB

Median spend per month by generation



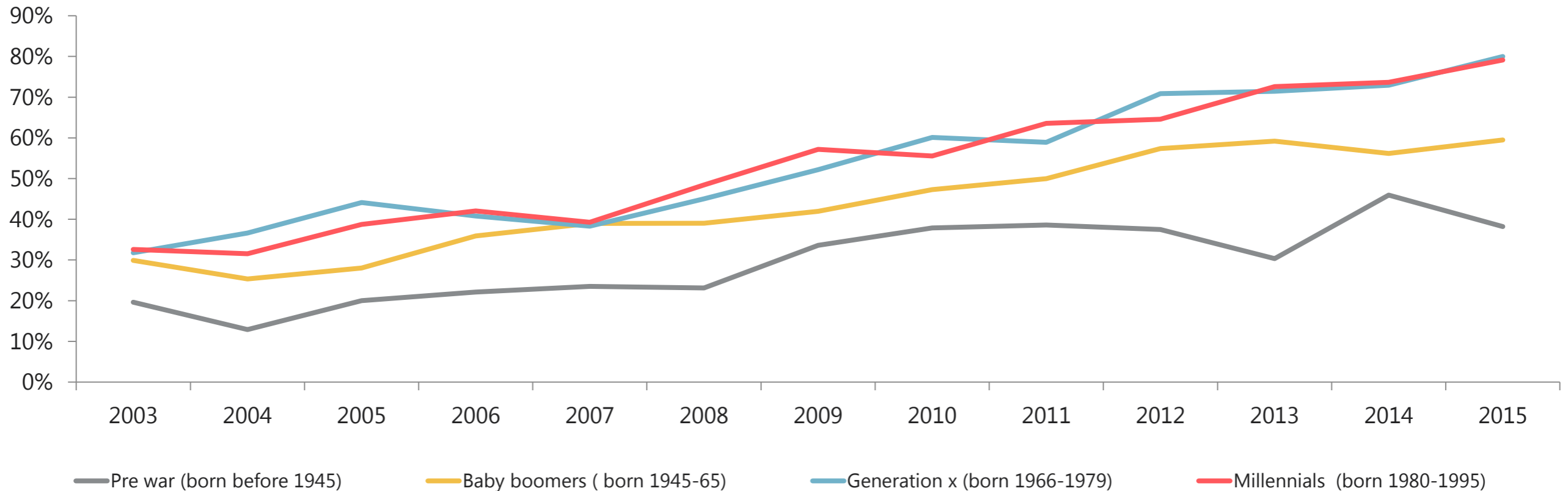
# GENERATION X MOST LIKELY TO DO FOOD SHOPPING ONLINE - GB

% Ordering food online in past 12 months



# BUT MILLENNIALS JUST AS LIKELY TO SHOP FOR CLOTHES AND SPORTS GOODS ONLINE - GB

% ordering clothes or sports goods online in past 12 months





# 9.

## SOCIAL

## ATTITUDES

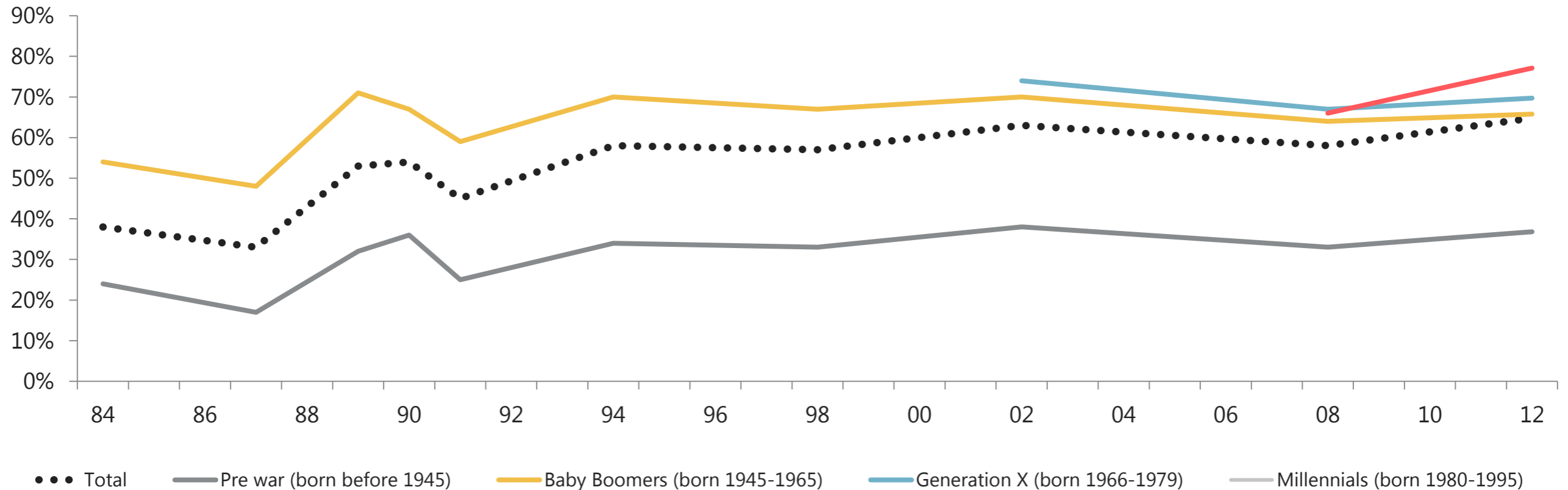


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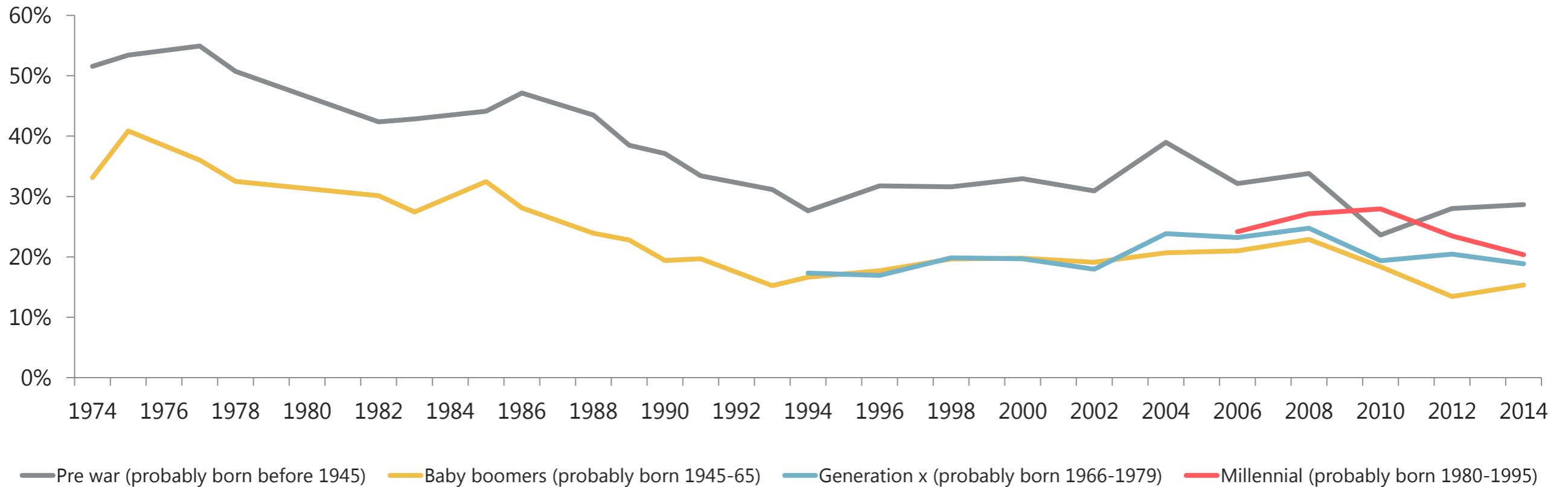
# THE REAL GENERATIONAL DIVIDE ON GENDER ROLES IS BETWEEN PRE-WAR AND THE YOUNGER GENERATIONS - GB

% disagree a husband's job is to earn money; a wife's job is to look after the home and family



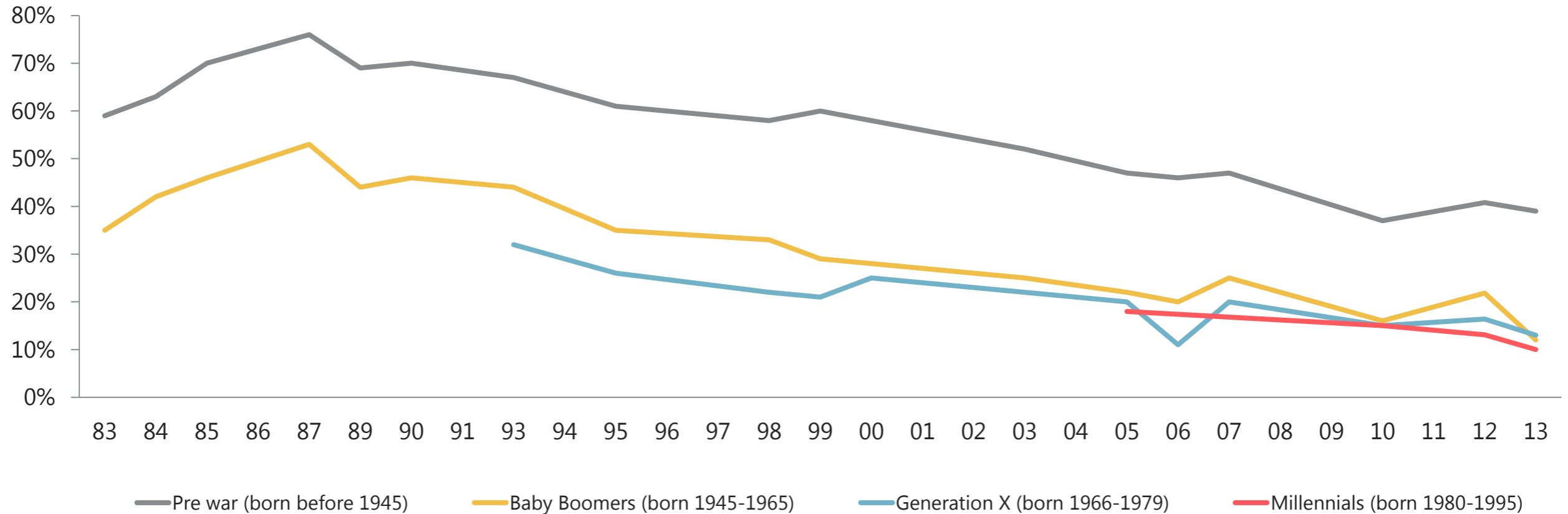
# MILLENNIALS ARE NOT THE MOST EGALITARIAN ABOUT WOMEN IN POLITICS IN THE US

% Agree most men are better suited emotionally for politics than are most women



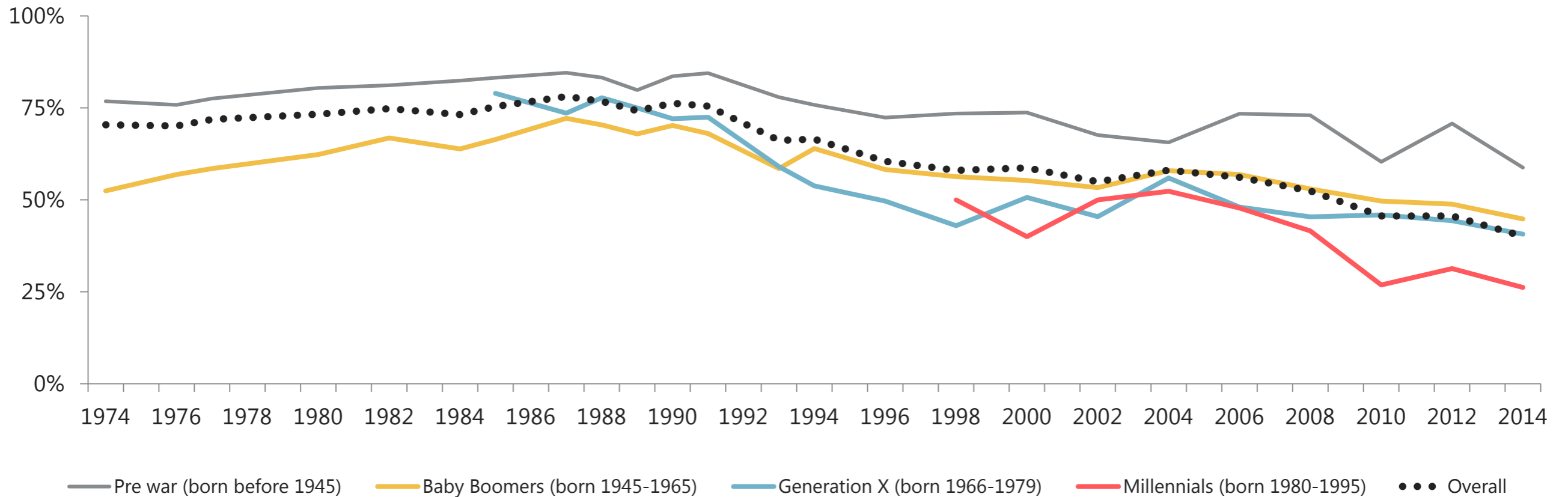
# ALL GENERATIONS AFTER PRE-WAR ARE SIMILARLY ACCEPTING OF HOMOSEXUALITY - GB

% thinking sexual relations between two adults of the same sex always wrong



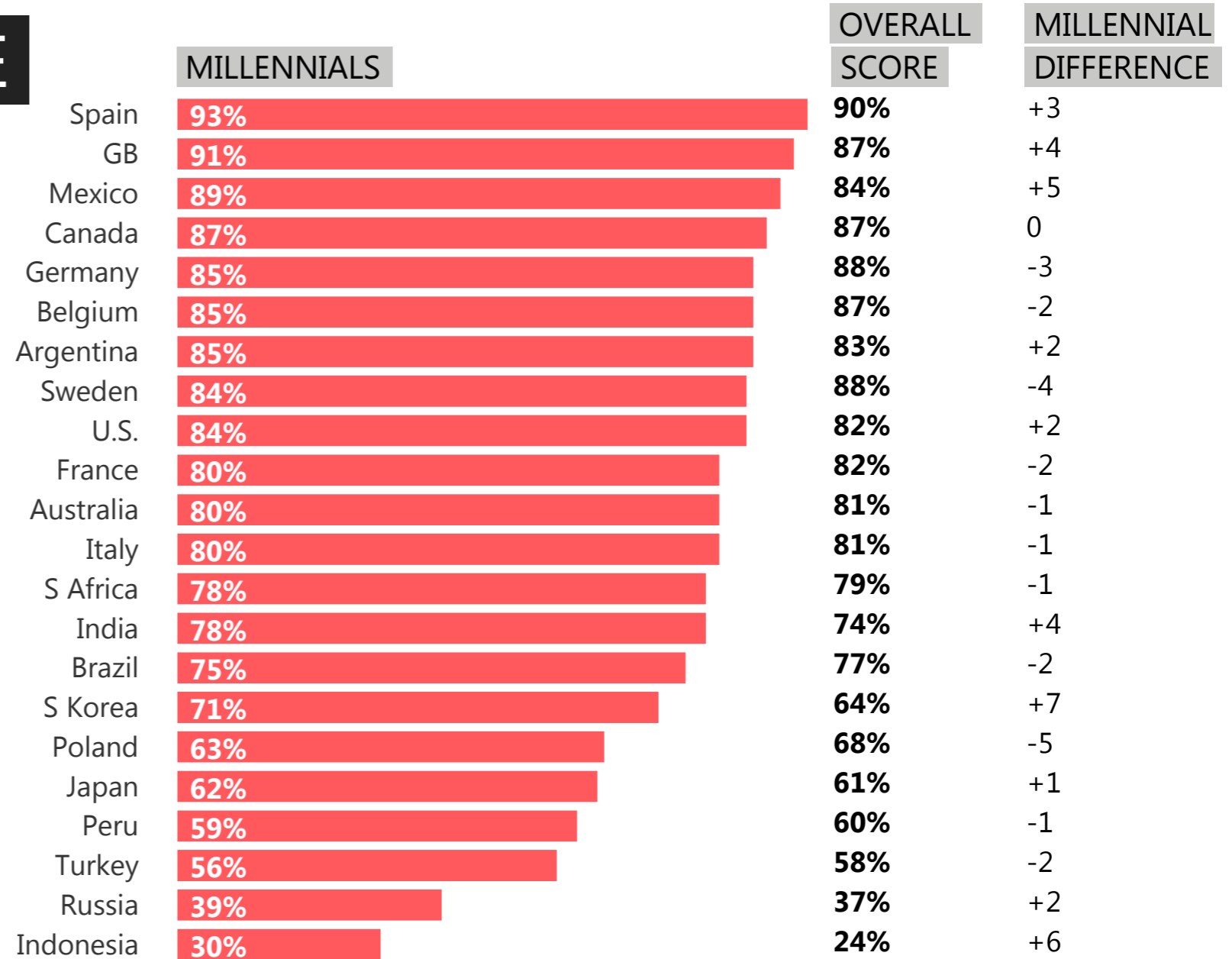
# BUT IN THE US, MILLENNIALS NOTABLY MORE TOLERANT OF HOMOSEXUALITY THAN OTHER GENERATIONS

% thinking sexual relations between two adults of the same sex always wrong



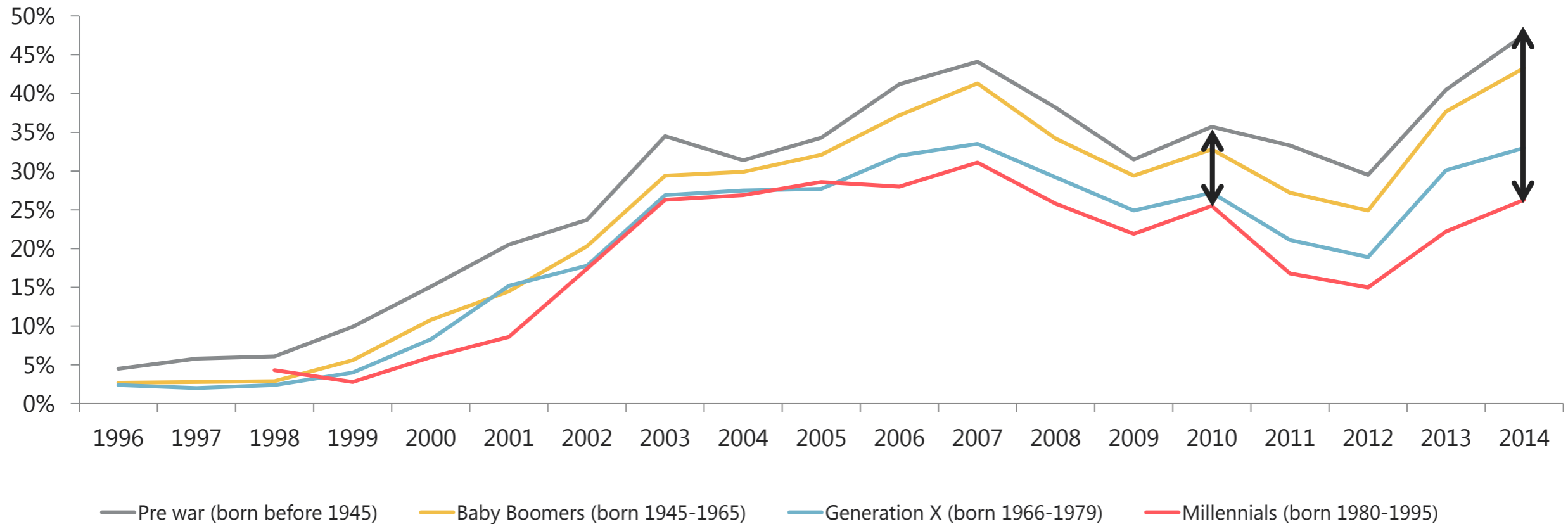
# LEVELS OF ACCEPTANCE OF HOMOSEXUALITY VARY WIDELY WORLDWIDE

% agree gay men and lesbians  
should be free to live their  
own lives as they wish



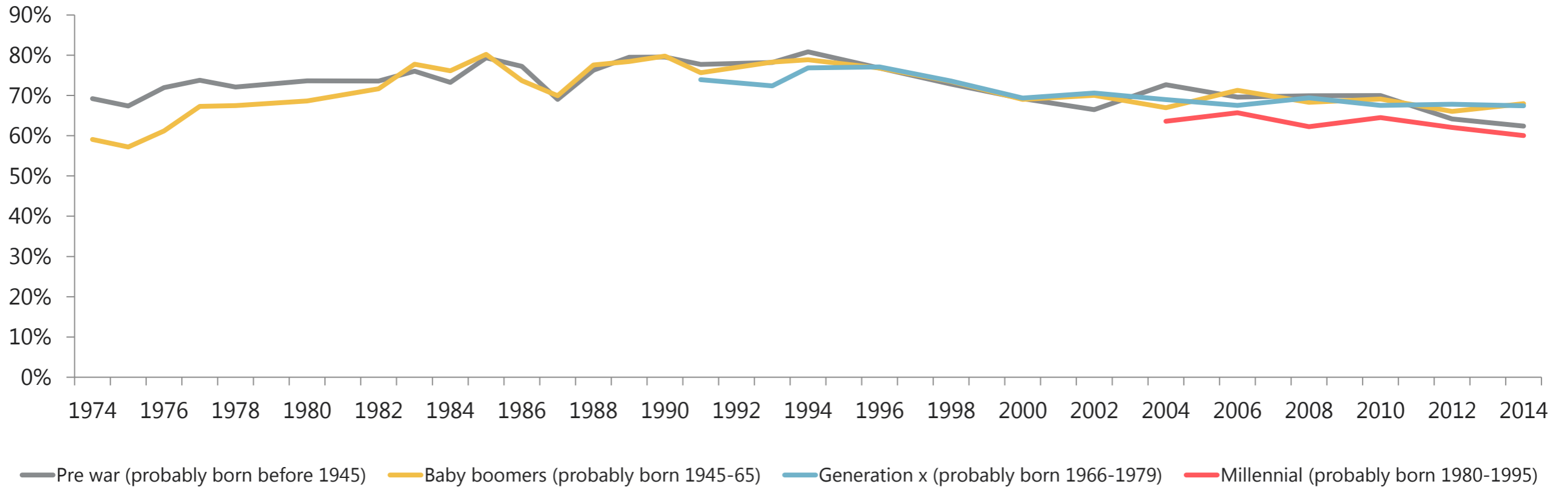
# GENERATIONS HAVE DIVERGED IN THEIR VIEWS ON THE SALIENCE OF IMMIGRATION SINCE THE 2010 ELECTION - GB

% race relations/immigration the most important issue/ important issues facing Britain today



# MILLENNIALS SLIGHTLY LESS LIKELY TO SUPPORT THE DEATH PENALTY IN THE US

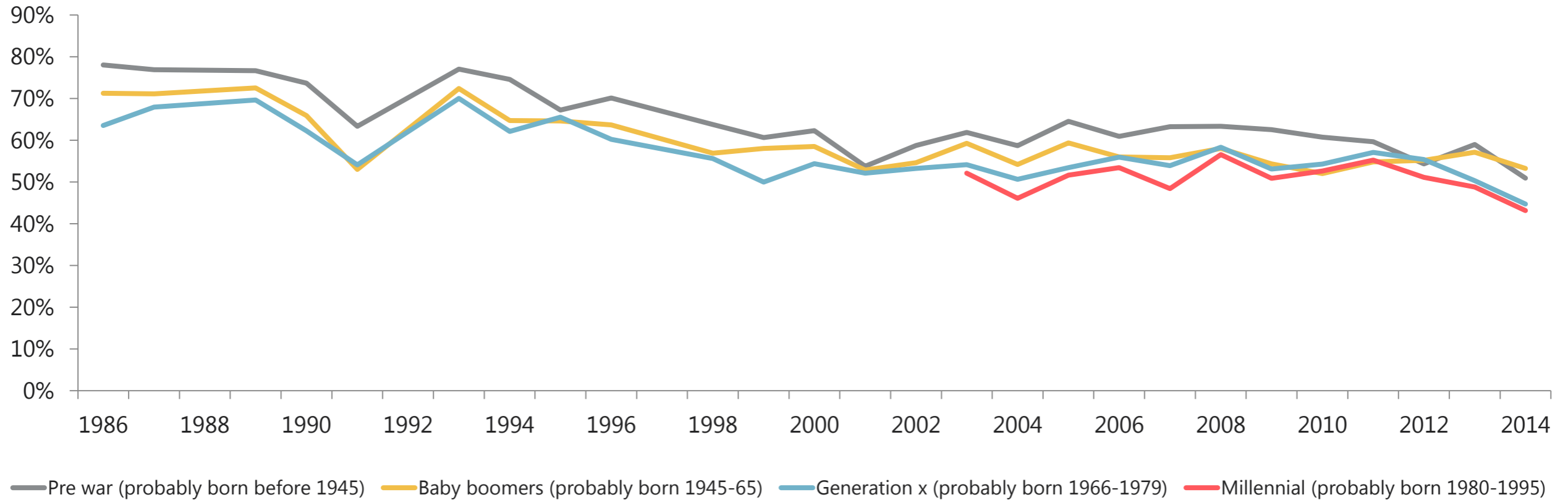
% Favour the death penalty for persons convicted of murder





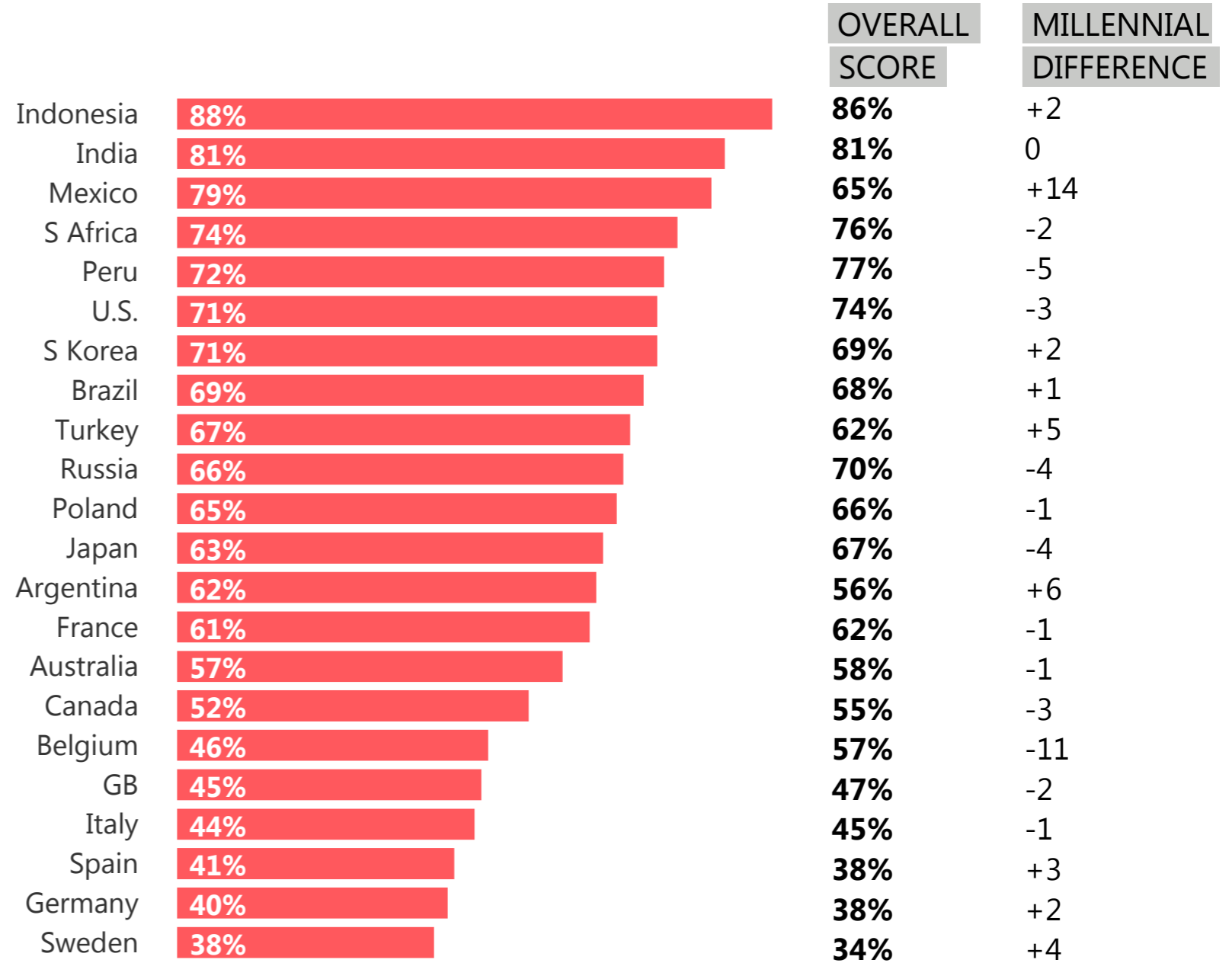
# THE DECLINE IN SUPPORT FOR THE DEATH PENALTY IN BRITAIN HAS BEEN SIMILAR ACROSS GENERATIONS

% agree for some crimes, the death penalty is the most appropriate sentence



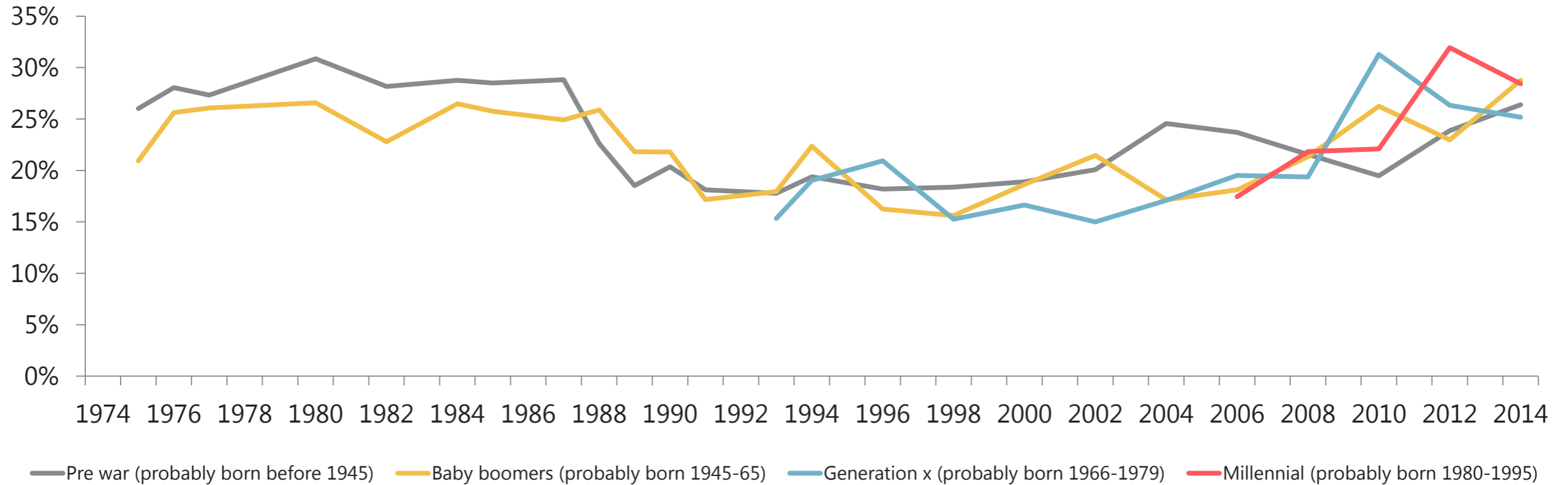
# MILLENNIALS ARE MOSTLY ALIGNED TO THE NATIONAL SENTIMENT ON THE DEATH PENALTY

% supporting the death penalty for the most serious crimes



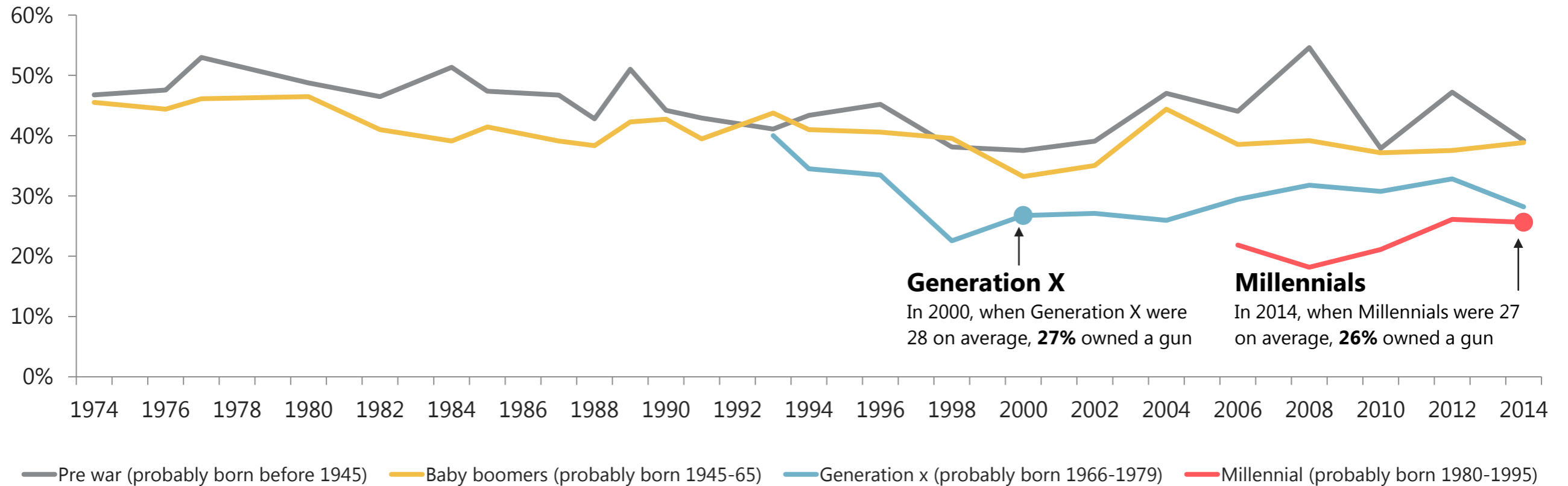
# MILLENNIALS JUST AS LIKELY TO SUPPORT GUN RIGHTS AS OTHER GENERATIONS IN THE US

% oppose a law which would require a person to obtain a police permit before he/she could buy a gun



# NO REAL GENERATIONAL DECLINE IN GUN OWNERSHIP - US

% have a gun or revolver in home/garage



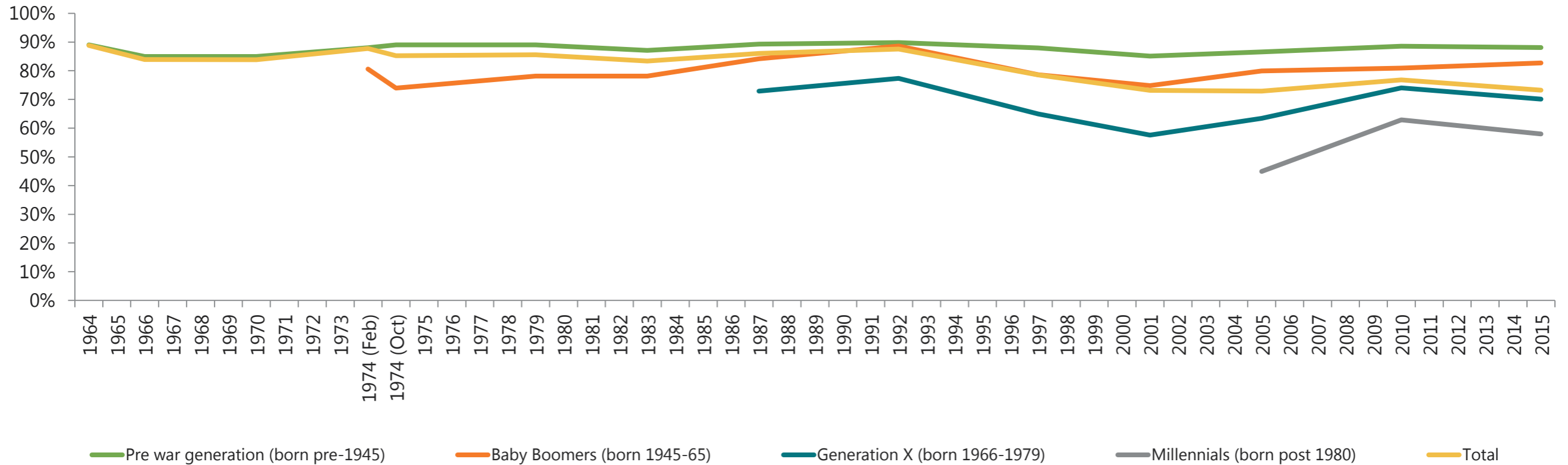
# 10.

# POLITICS



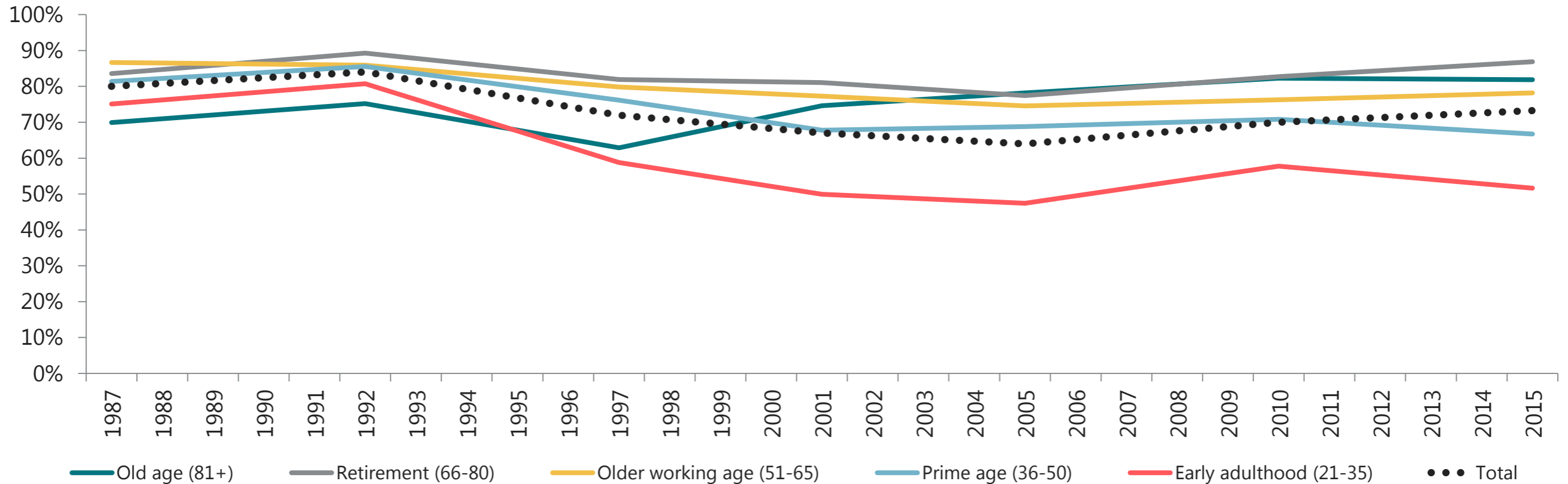
# MILLENNIALS HAVE CONSISTENTLY VOTED LESS THAN OLDER GENERATIONS

% claimed vote by generation



# YOUNG ADULTS HAVE BECOME LESS LIKELY TO VOTE IN BRITAIN

% verified claimed vote by age group



# MILLENNIAL TURNOUT IN BRITAIN NOT MUCH WORSE THAN GENERATION X WHEN THEY WERE THE SAME AGE IN 1997

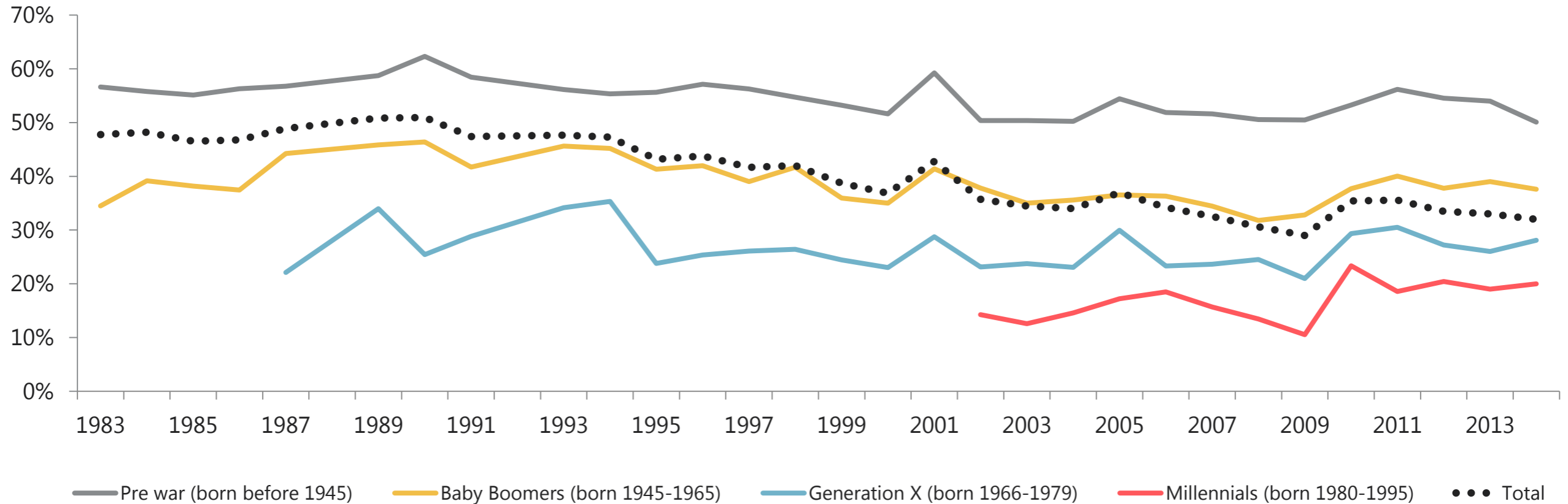
% claimed vote

	CLAIMED TURNOUT	GAP BETWEEN COHORT AND AVERAGE TURNOUT
<b>BABY BOOMERS</b> 1983 General Election (average age 28)	<b>79%</b>	<b>-4 pp</b>
<b>GENERATION X</b> 1997 General election (average age 27)	<b>65%</b>	<b>-14 pp</b>
<b>MILLENNIALS</b> 2015 General election (average age 28)	<b>58%</b>	<b>-15 pp</b>



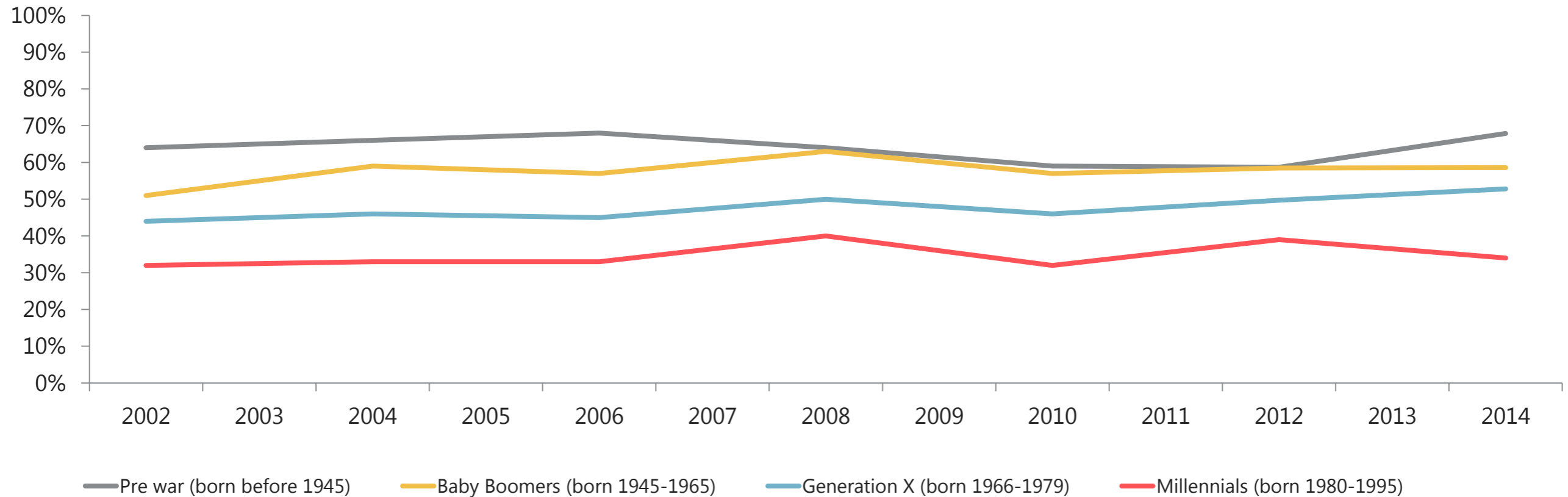
# THERE IS A STRONG GENERATIONAL DECLINE IN PARTY SUPPORT IN BRITAIN

% supporter of any one political party



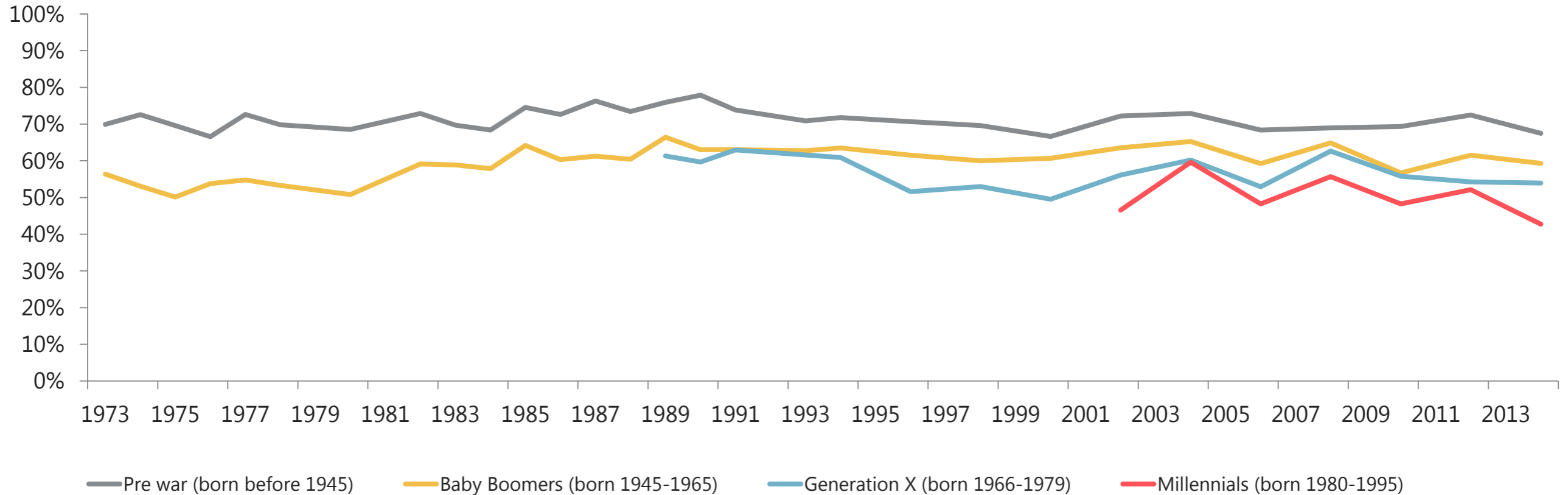
# THE SAME GENERATIONAL PATTERN CAN BE SEEN IN FRANCE

% feel closer to a particular party than all other parties



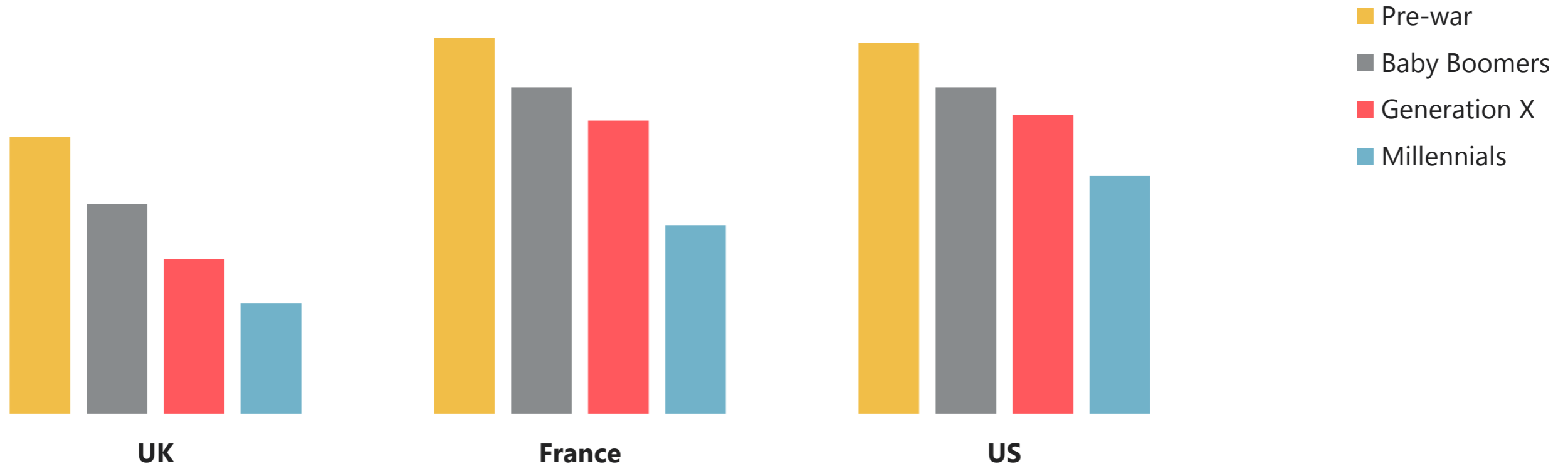
# MILLENNIALS ARE LESS LIKELY TO IDENTIFY AS DEMOCRAT OR REPUBLICAN - US

% close to one particular party (Democrat/Republican)



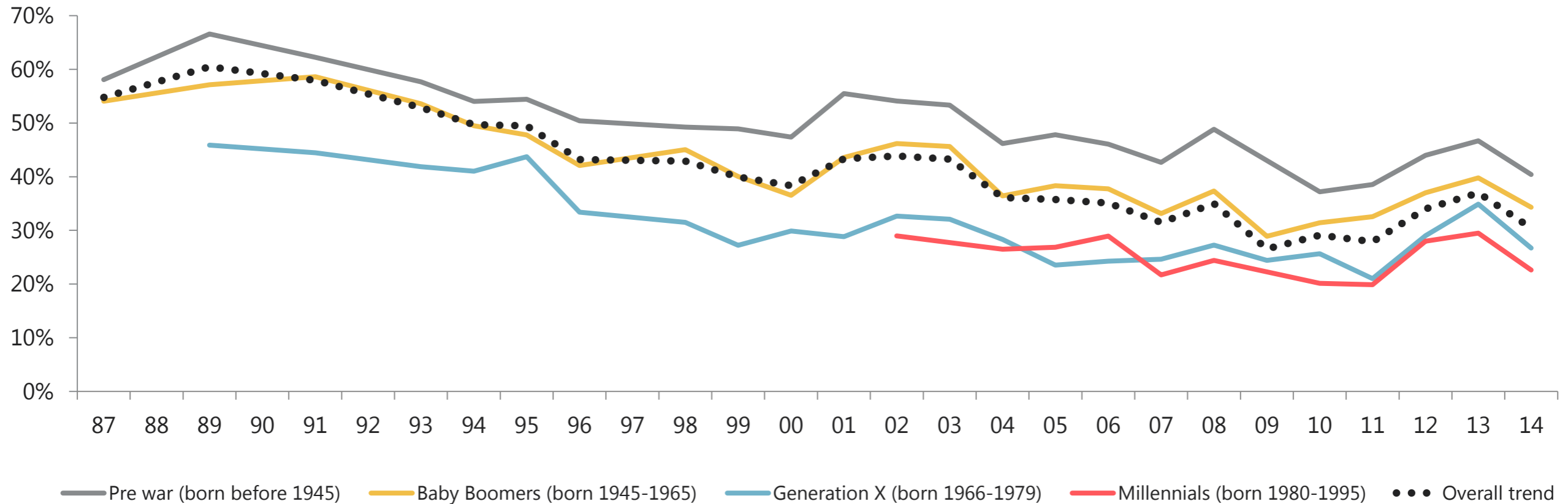
# GENERATIONAL DECLINE IN PARTY IDENTIFICATION MEANS MILLENNIAL VOTES ARE NOT LOCKED IN

% feel closer/close to a particular party



# MILLENNIALS ARE LESS SUPPORTIVE OF GOVERNMENT REDISTRIBUTION OF WEALTH - GB

% agree government should spend more money on welfare benefits for the poor, even if it leads to higher taxes

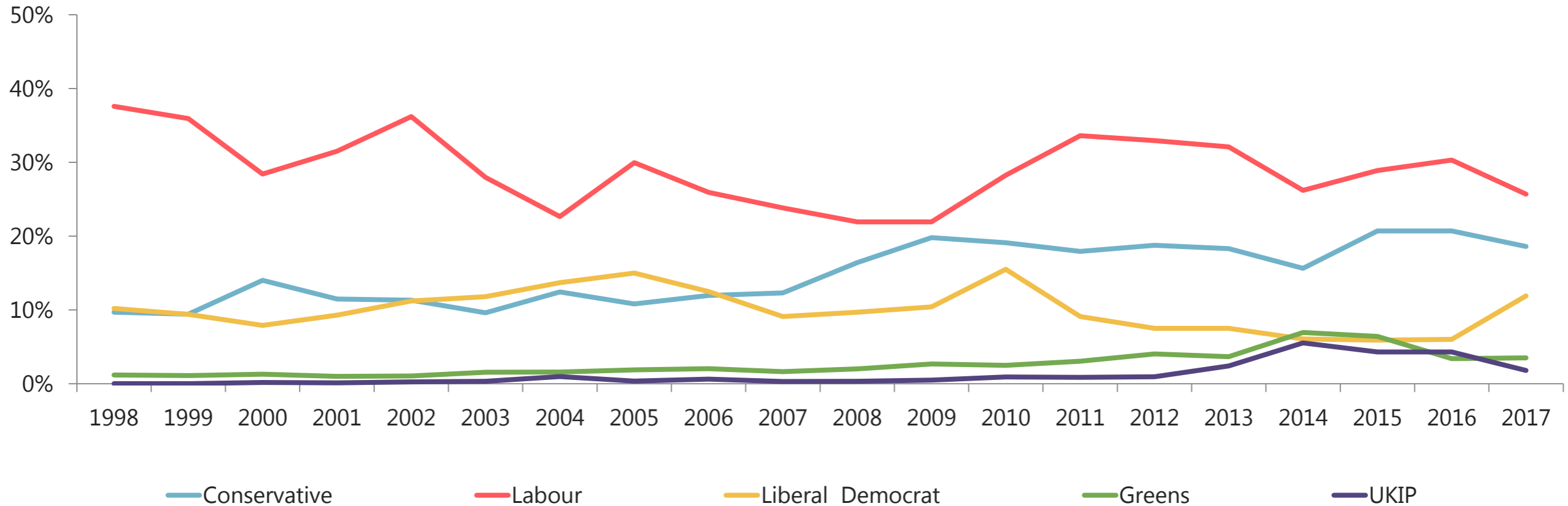


# EUROPEAN MILLENNIALS ARE MORE LIKELY TO IDENTIFY AS LEFT WING

	UK	GERMANY	FRANCE	SWEDEN	SPAIN	ITALY	IRELAND	GREECE	POLAND
<b>LEFT WING</b>	<b>19%</b>	<b>20%</b>	<b>24%</b>	<b>39%</b>	<b>34%</b>	<b>26%</b>	<b>17%</b>	<b>20%</b>	<b>10%</b>
<b>RIGHT WING</b>	<b>4%</b>	<b>5%</b>	<b>11%</b>	<b>10%</b>	<b>6%</b>	<b>15%</b>	<b>7%</b>	<b>14%</b>	<b>24%</b>
<b>'NET LEFT'</b>	<b>+14</b>	<b>+15</b>	<b>+12</b>	<b>+29</b>	<b>+28</b>	<b>+12</b>	<b>+10</b>	<b>+6</b>	<b>-13</b>

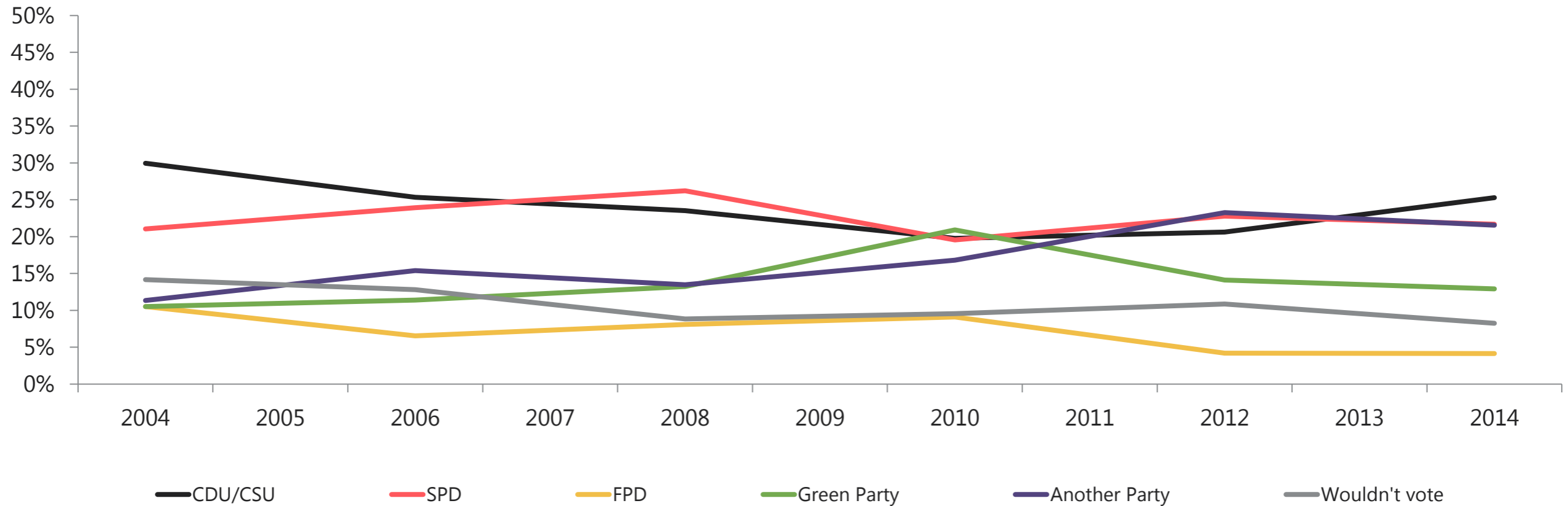
# LABOUR IS THE MOST POPULAR PARTY FOR MILLENNIALS IN BRITAIN

How would you vote if there was a General Election tomorrow?



# THE MILLENNIAL VOTE IS MORE SPLINTERED IN GERMANY

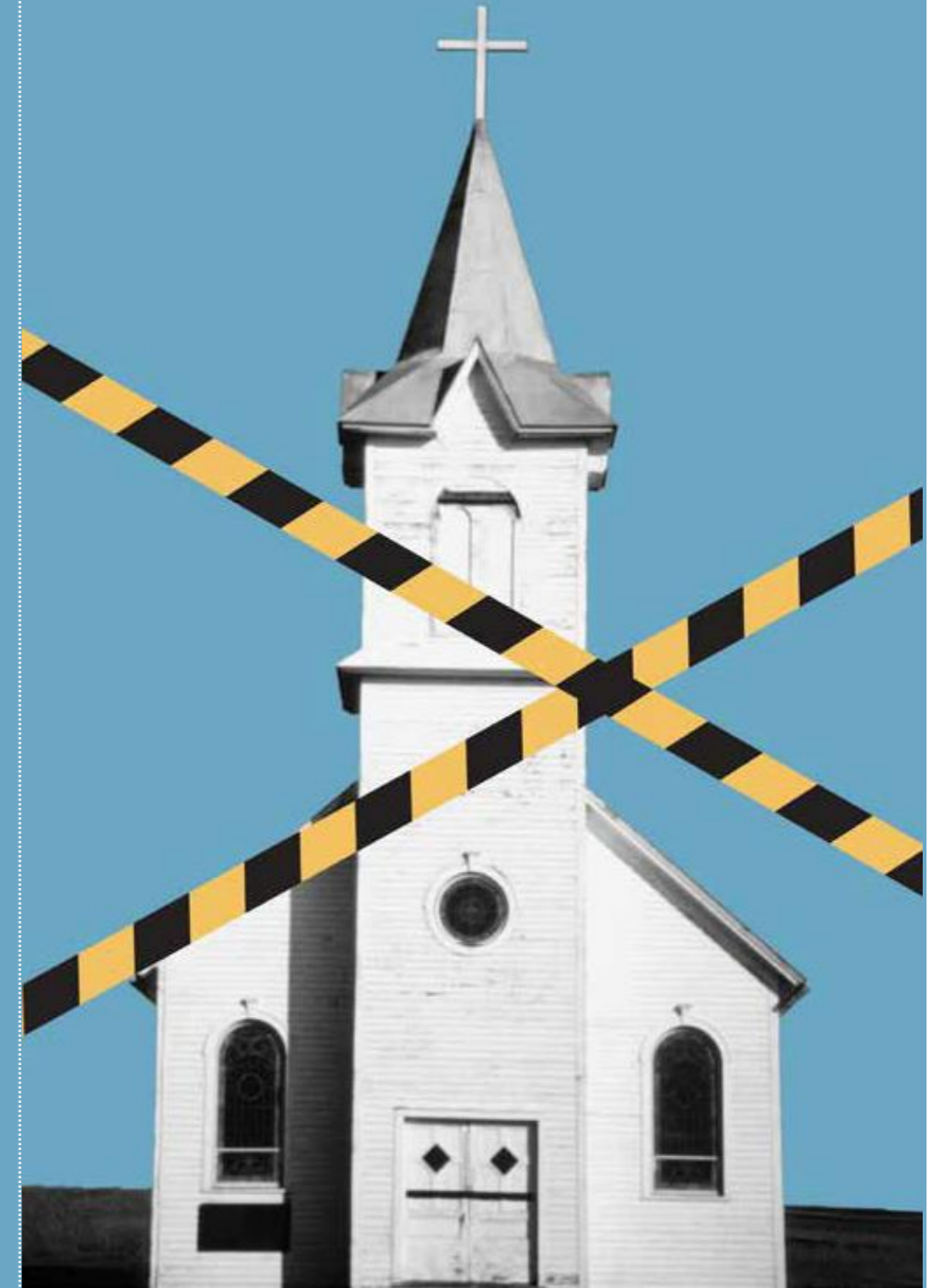
Which party would you vote for if there was a Federal Election on Sunday?- Millennials





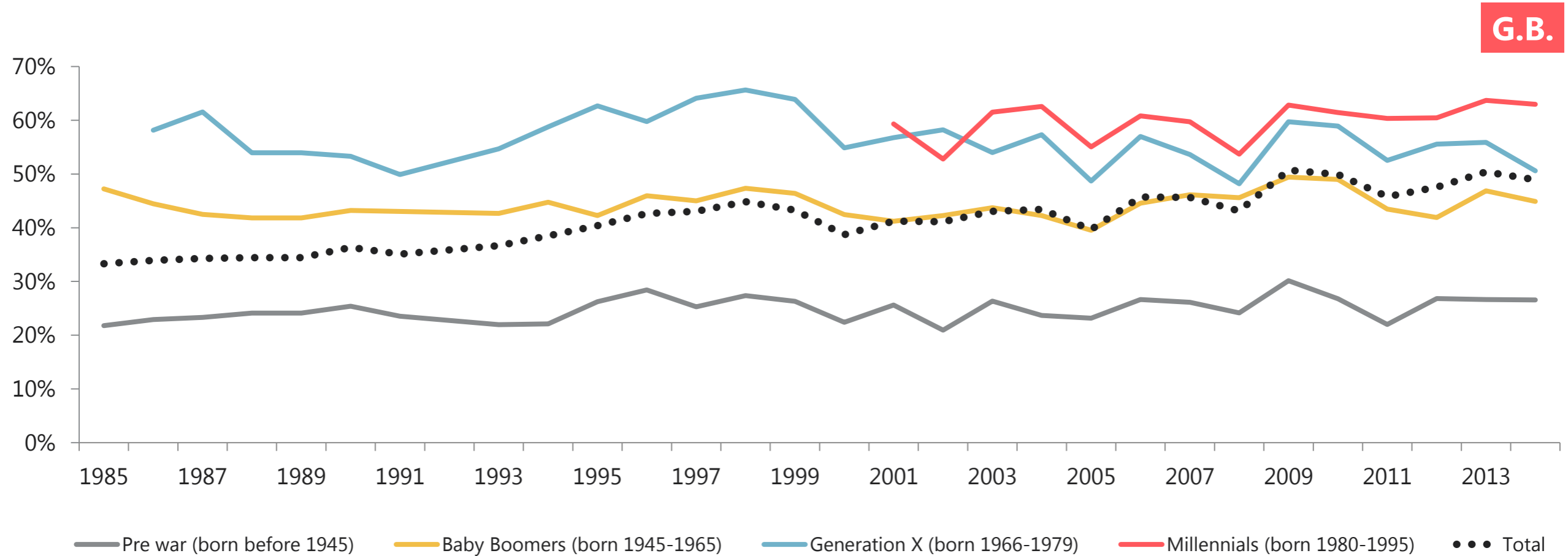
# 11.

## RELIGION



# MILLENNIALS ARE THE LEAST RELIGIOUS GENERATION - GB

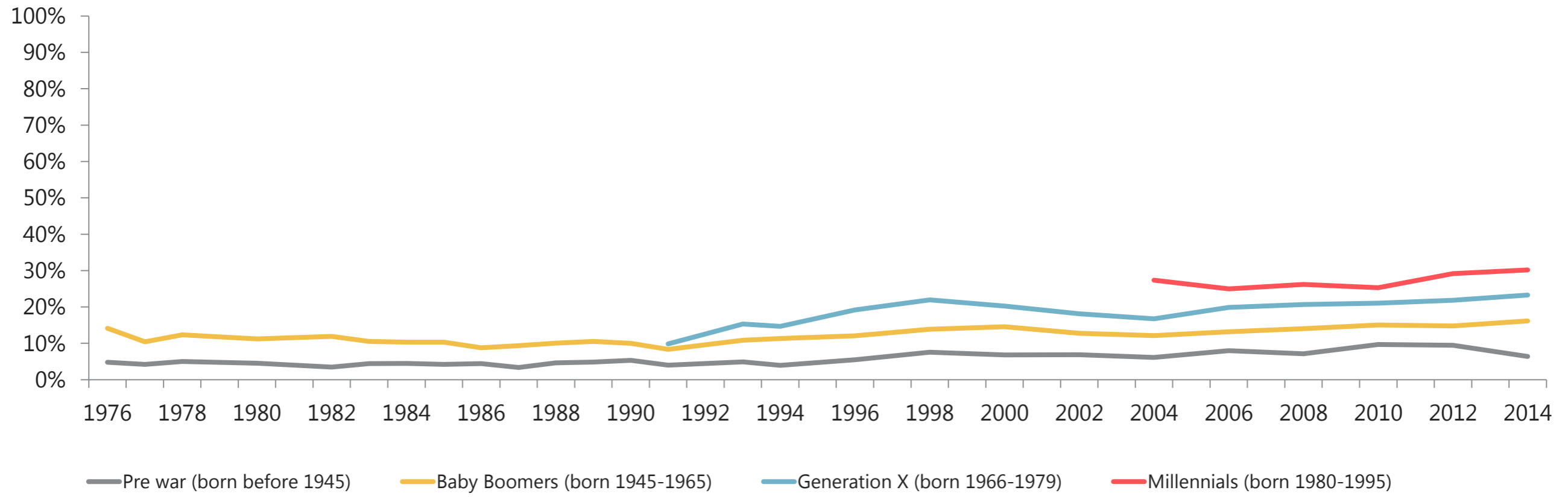
% who do not identify with any religion



# SIMILARLY, MILLENNIALS ARE THE GENERATION MOST LIKELY TO SAY THEY HAVE NO RELIGION - US

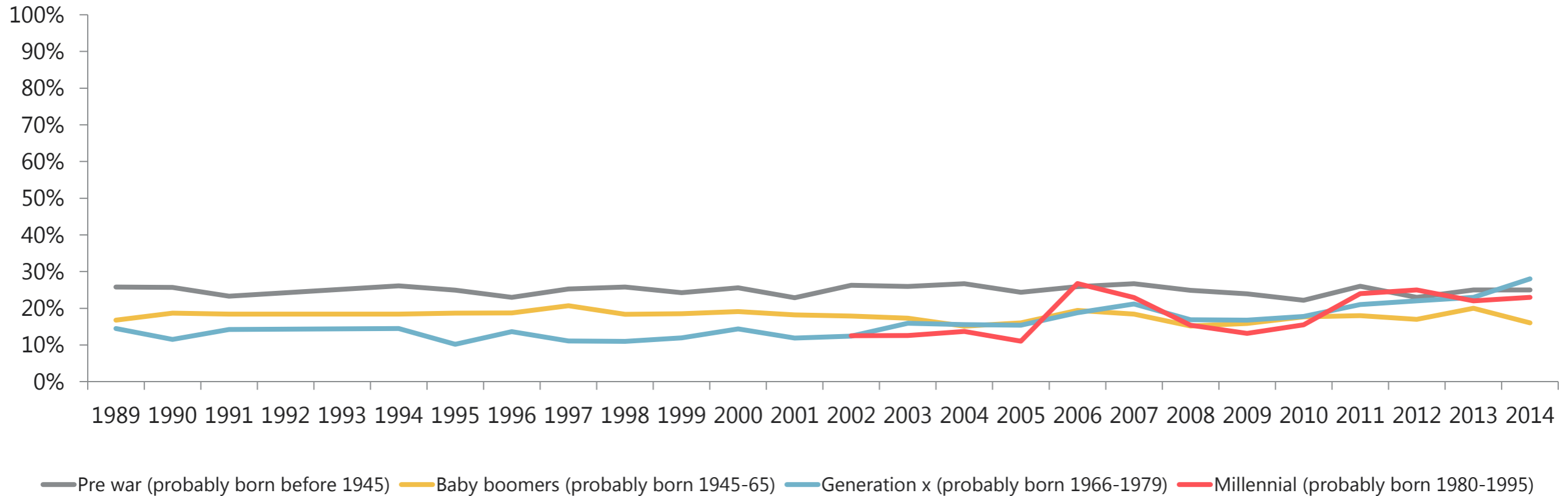
% no religion

U.S.



# BUT RELIGIOUS MILLENNIALS ARE JUST AS LIKELY TO PRACTICE THEIR RELIGION REGULARLY - GB

% attending services or meetings connected with their religion least once per month



# YOUNGER GENERATIONS ARE MORE LIKELY TO IDENTIFY WITH NON-CHRISTIAN RELIGION

% identify with religions by generation

	1994				2011			
	PRE-WAR	BABY BOOMER	GEN X	GEN Y	PRE-WAR	BABY BOOMER	GEN X	GEN Y
<b>NO RELIGION</b> ▶	22	43	55	N/A	22	43	52	<b>60</b>
<b>CHRISTIAN</b> ▶	75	52	40	N/A	76	49	36	<b>25</b>
<b>MUSLIM</b> ▶	0	2	3	N/A	0	1	5	<b>7</b>
<b>HINDU</b> ▶	1	1	2	N/A	0	2	3	<b>3</b>

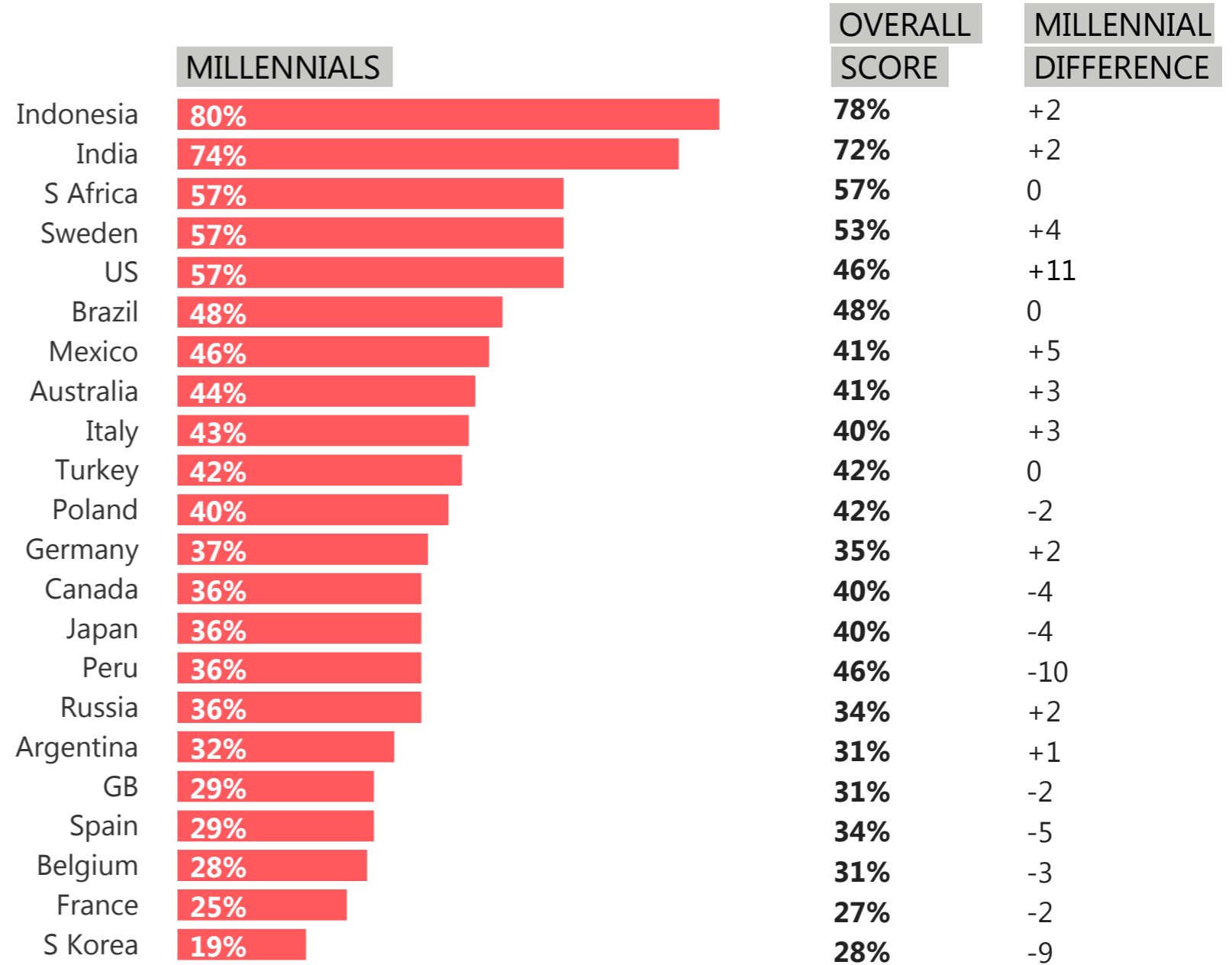
# 12.

# TRUST



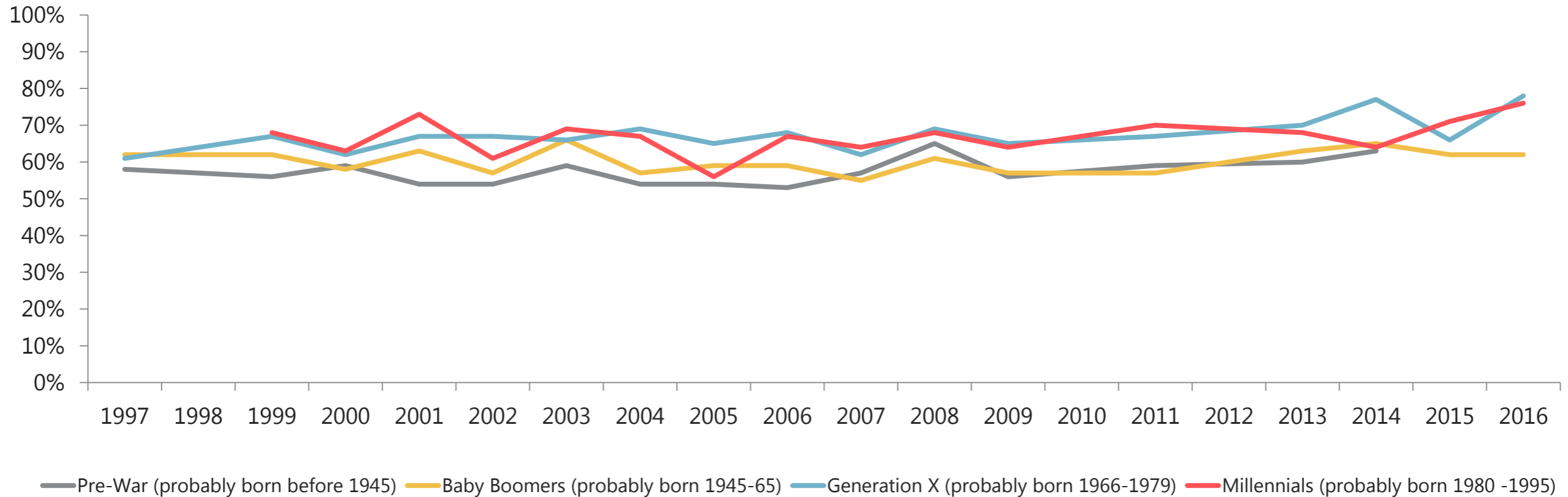
# MILLENNIAL TRUST IN BUSINESSES IS GENERALLY SIMILAR TO THE NATIONAL SENTIMENT

% high level of trust in  
businesses in general



# THERE'S NO GENERATIONAL DECLINE IN TRUST IN THE POLICE - GB

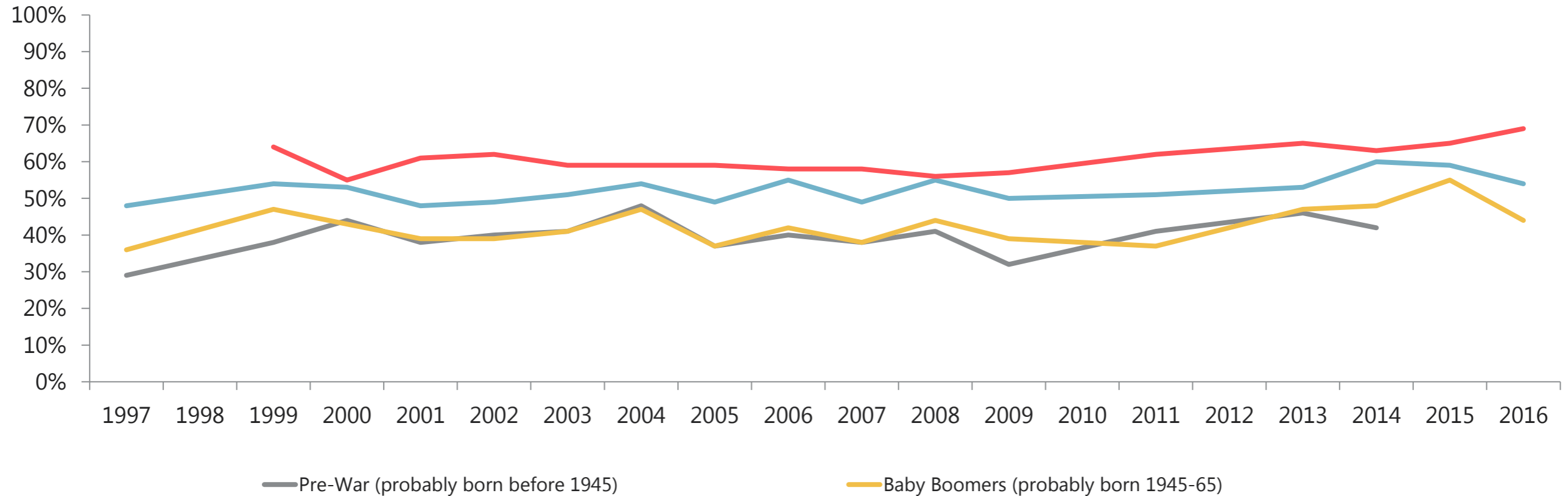
% who trust the police to tell the truth





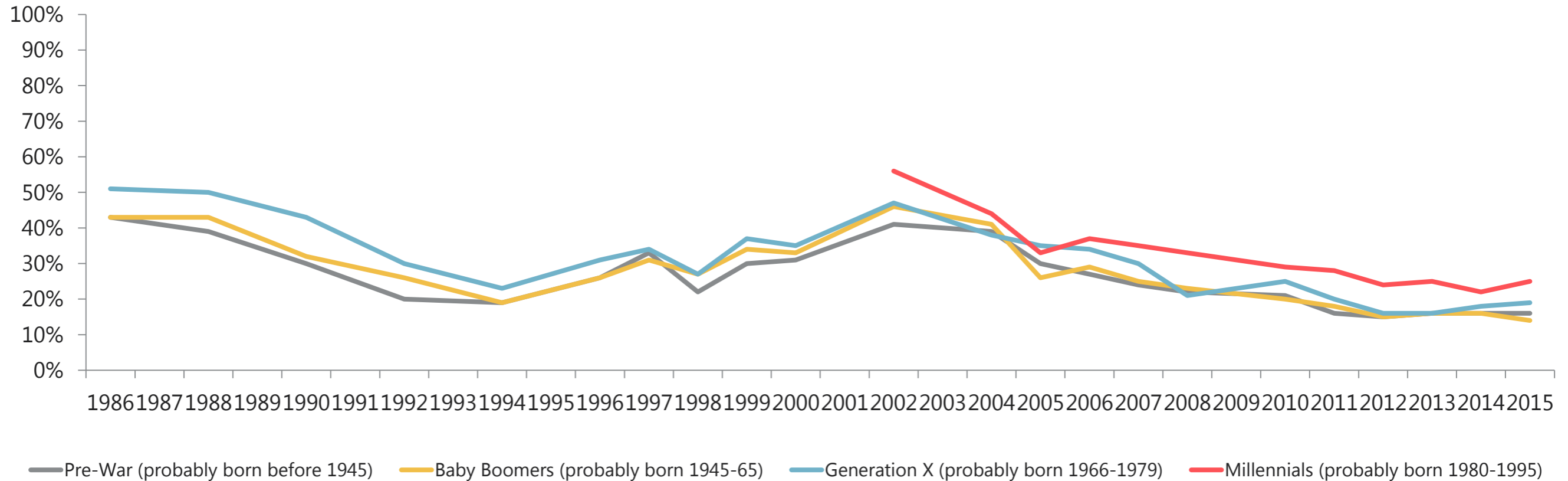
# MILLENNIALS ARE MORE LIKELY TO TRUST CIVIL SERVANTS - GB

% who trust civil servants to tell the truth



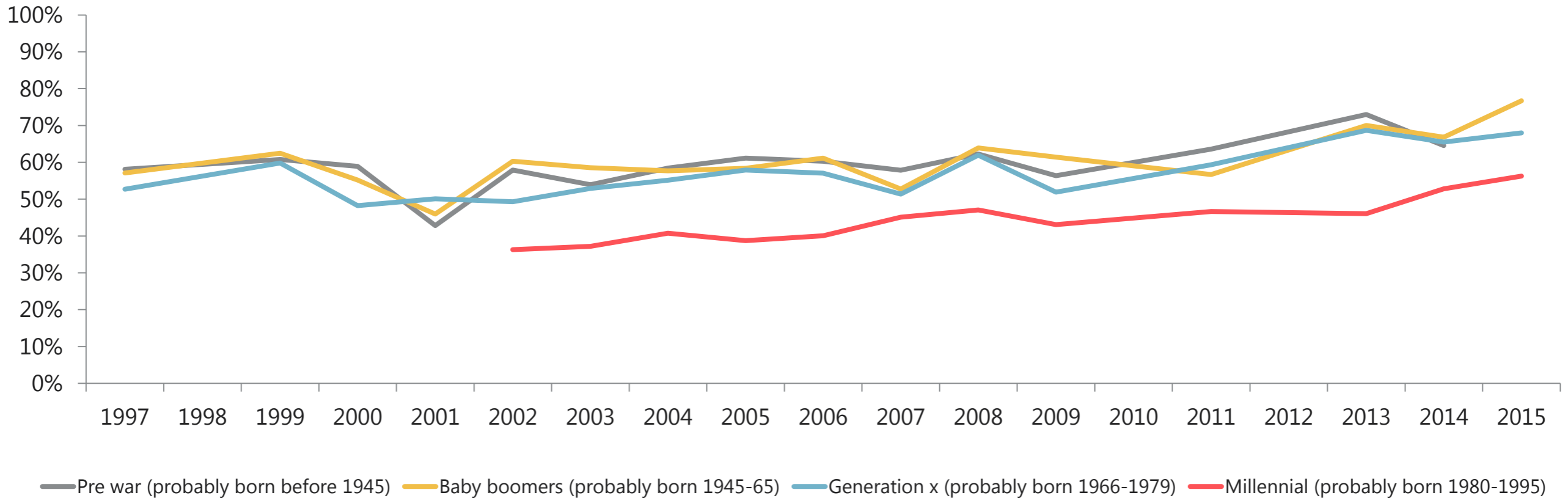
# MILLENNIALS HAVE HIGHER TRUST IN THE US GOVERNMENT

% who trust the government in Washington always or most of the time



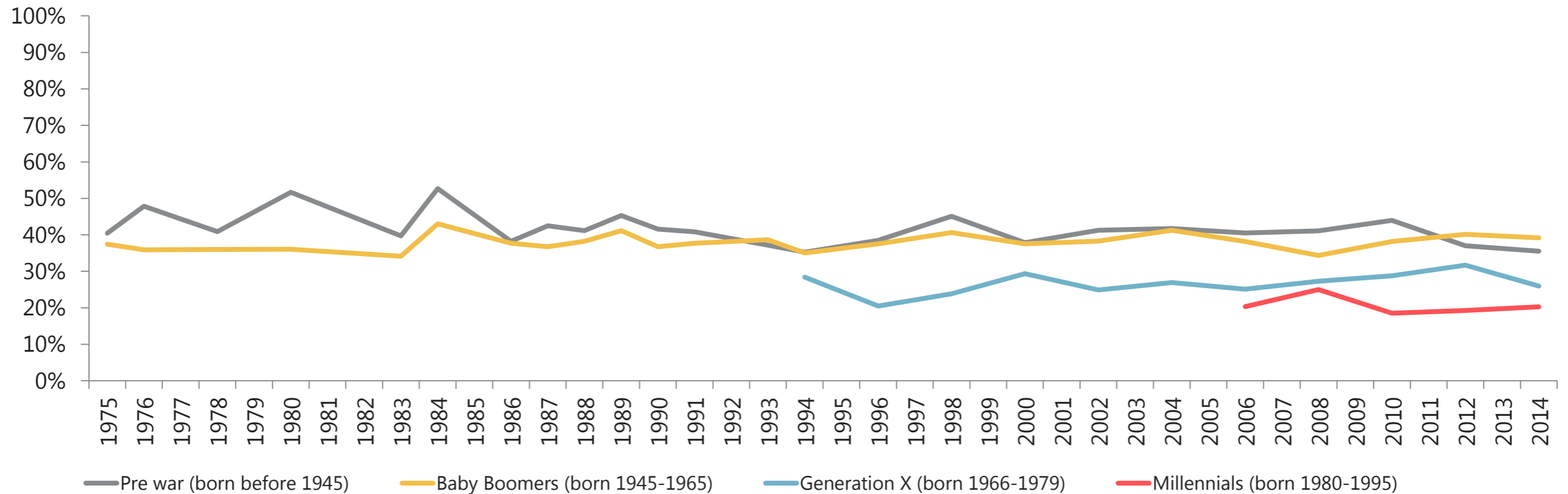
# MILLENNIALS ARE LESS LIKELY TO TRUST OTHER PEOPLE - GB

% trust the ordinary man/woman in the street to tell the truth



# THERE'S A SIMILAR PATTERN IN THE US

%, most people can be trusted



# 13.

## HEALTH

&

## WELLNESS

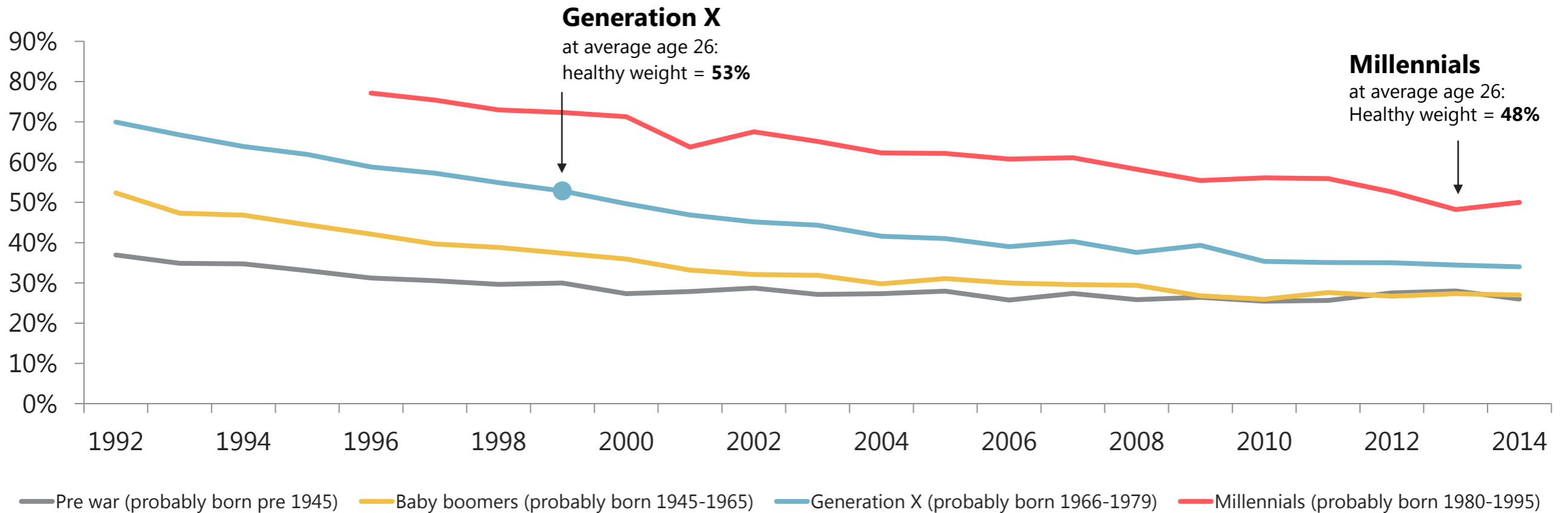


Ipsos MORI  
Social Research Institute



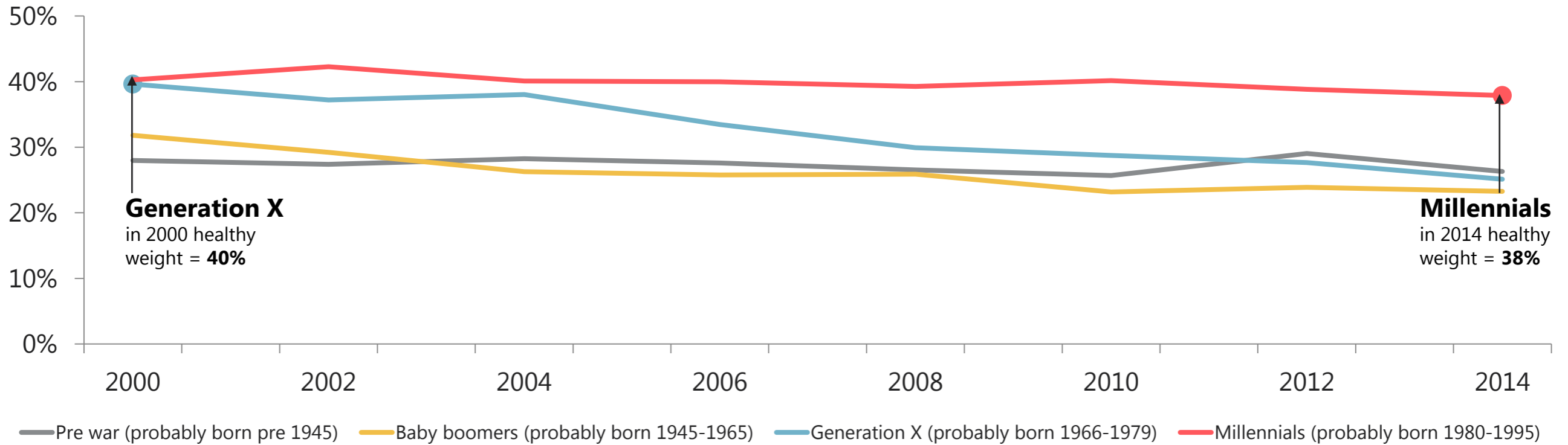
# MILLENNIALS ARE THE FIRST YOUNG GENERATION WHERE OVER HALF ARE OVERWEIGHT - ENGLAND

% with a healthy weight (defined as BMI score 18.5-24.9)



# MILLENNIALS TODAY ARE SLIGHTLY LESS LIKELY TO HAVE A HEALTHY WEIGHT THAN GENERATION X WHEN THEY WERE THE SAME AGE - US

% with a healthy weight (defined as BMI score 18.5-24.9)



# DAILY SUGAR CONSUMPTION IN THE UK

National Diet & Nutrition Survey

Daily sugar consumption in  
UK National Diet & Nutrition Survey

MILLENNIALS NOW  
(2012)  
AGE 18-32

GENERATION X NOW  
(2012)  
AGE 33-46

GENERATION X THEN  
(2000)  
AGE 21-34

BABY BOOMERS NOW  
(2012)  
AGE 47-67

DAILY FREE SUGAR CONSUMED  
(GRAMMES)

75g

55g

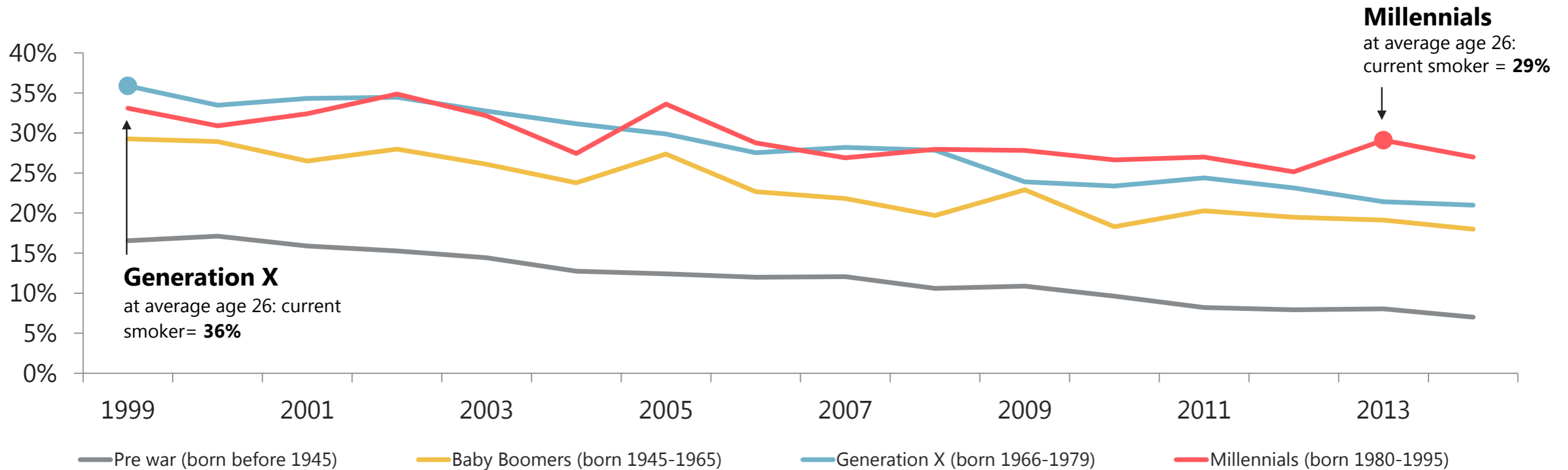
65g

53g



# SMOKING RATES HAVE DECLINED IN THE PAST 15 YEARS, BUT ARE DECREASING AT LOWER RATE AMONG MILLENNIALS - ENGLAND

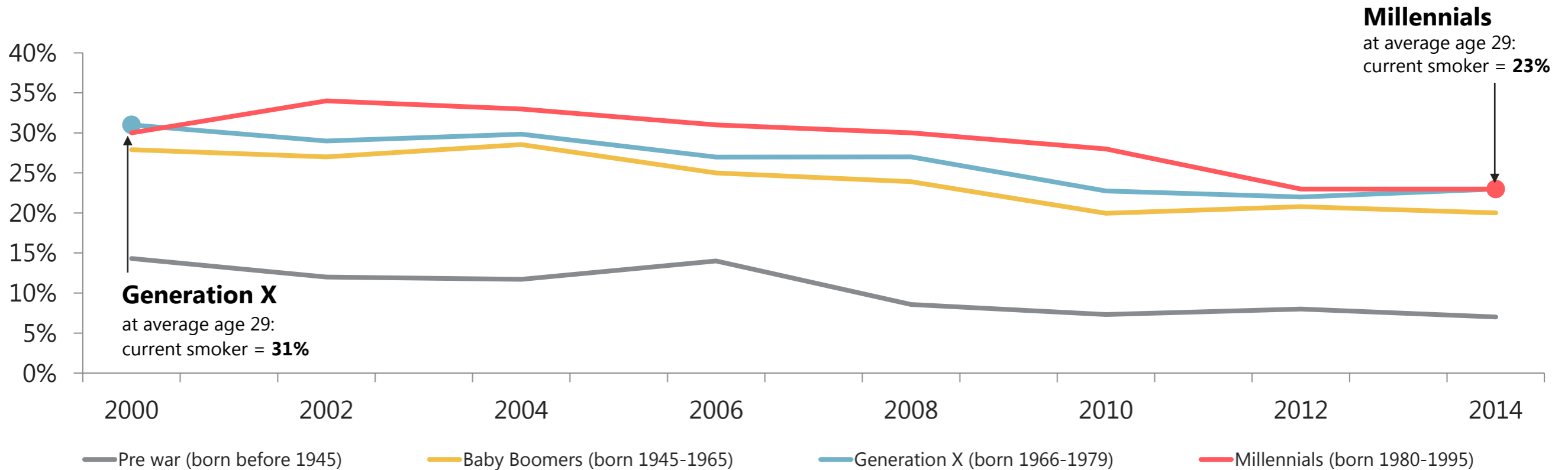
% current smoker (smoke every day/some days)



# BUT MILLENNIALS ARE GIVING SMOKING UP FASTER IN THE US

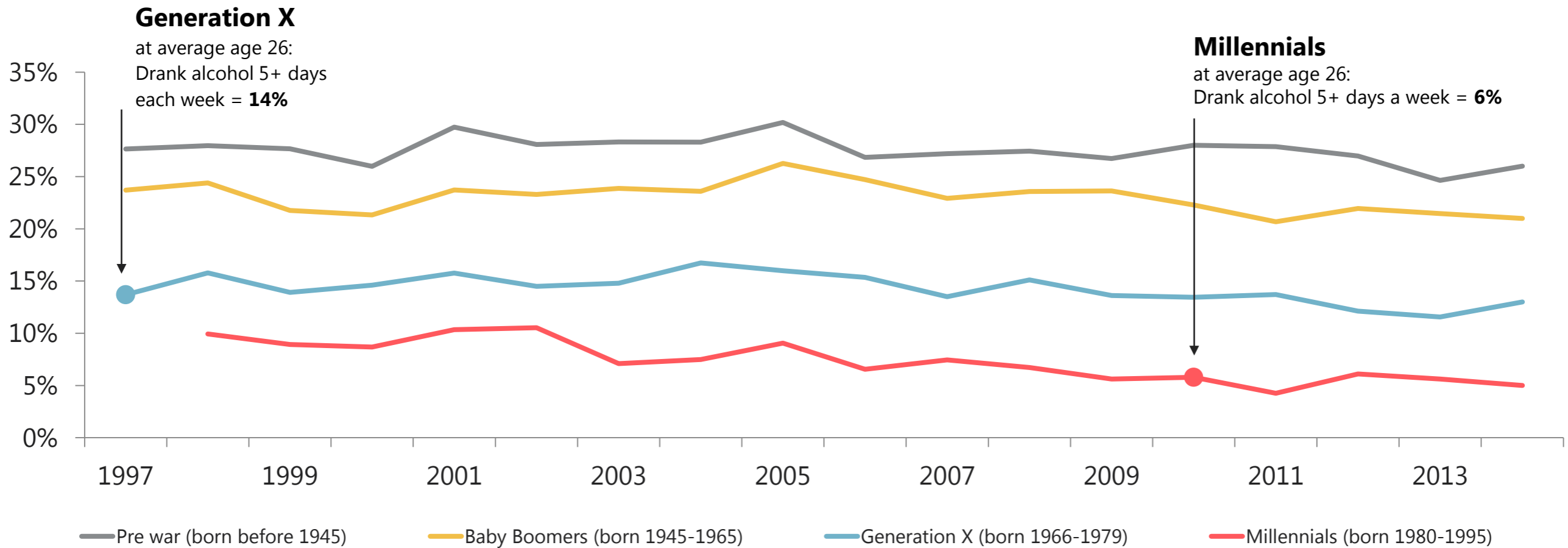
U.S.

% current smoker (smoke every day/some days)



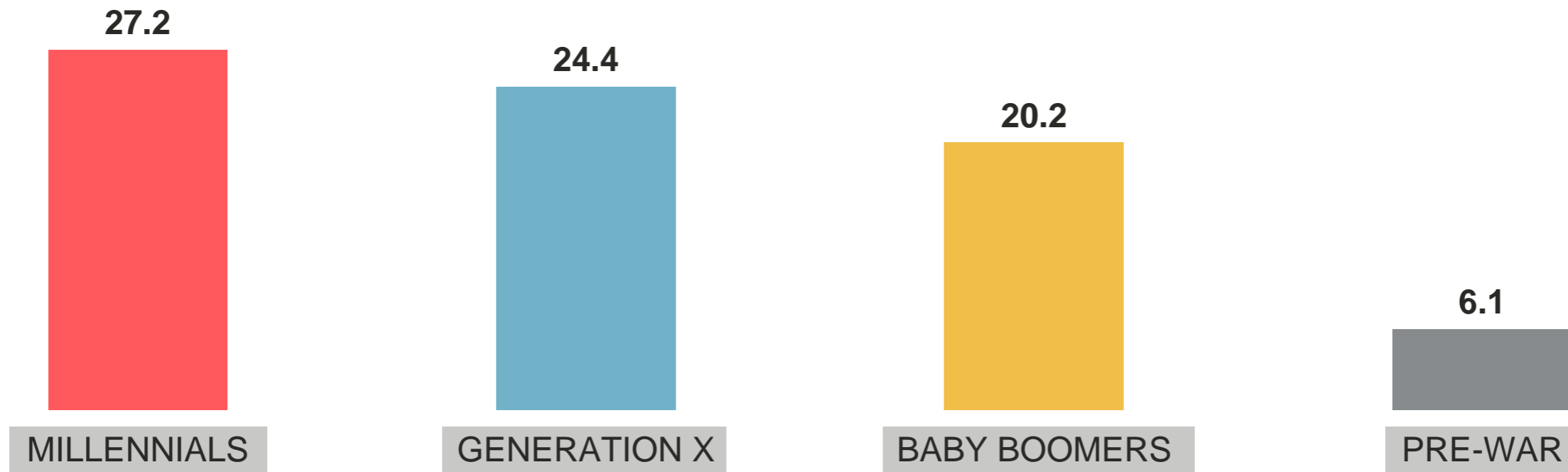
# THERE IS A STRICT GENERATIONAL PATTERN TO REGULAR ALCOHOL CONSUMPTION - ENGLAND

% drank alcohol on 5+ days/week



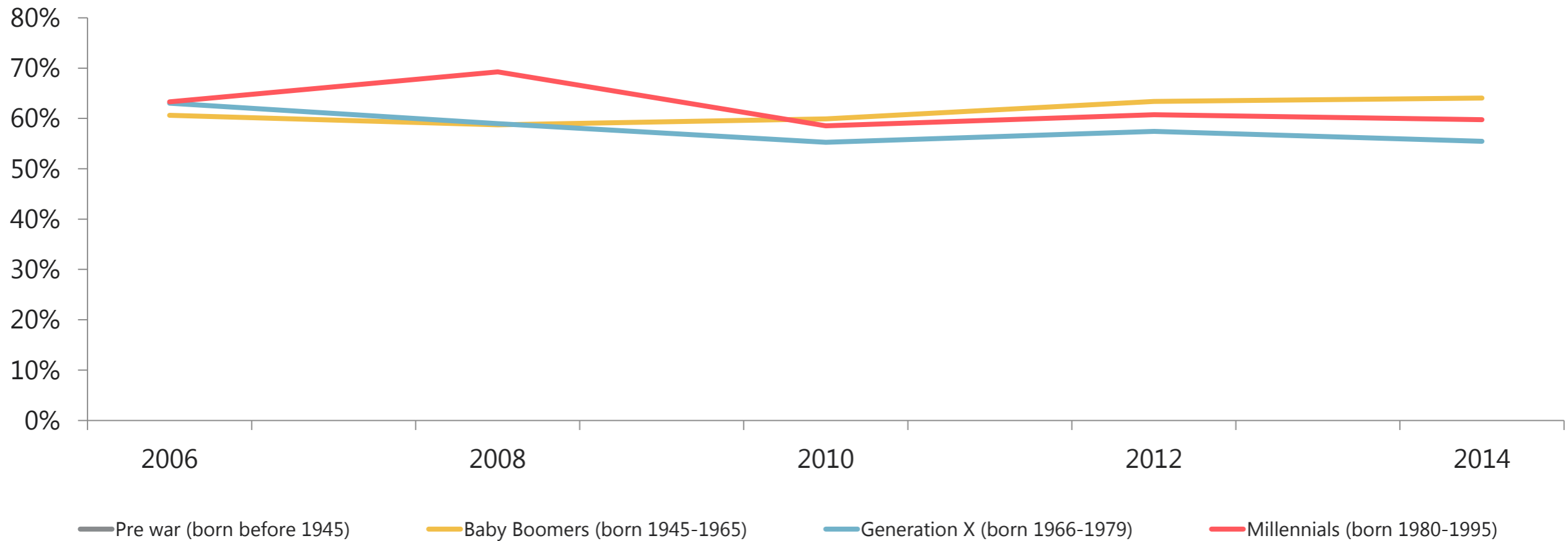
# ALTHOUGH MILLENNIALS MOST LIKELY TO DRINK HEAVILY WHEN THEY DO - ENGLAND

Units consumed on heaviest day of the last week >8 men, >6 women



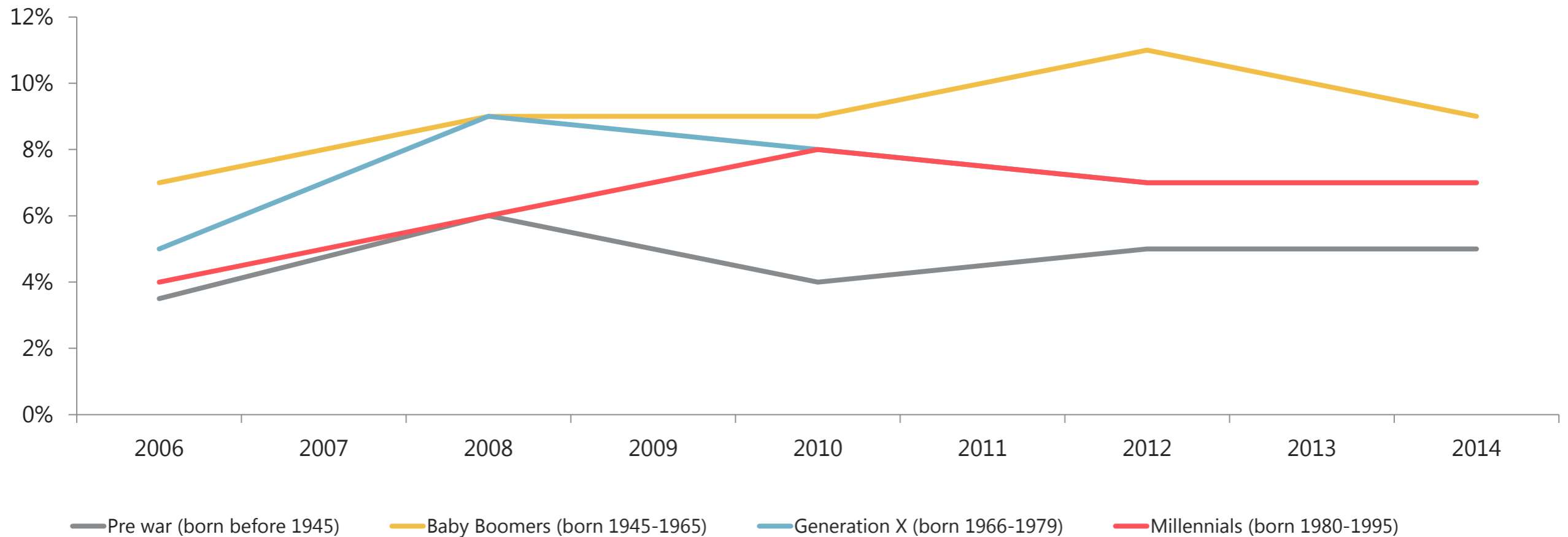
# NO DIFFERENCE BETWEEN GENERATIONS ON DRUG USE IN US

% ever used marijuana, cocaine, methamphetamines, heroin



# BABY BOOMERS ARE THE MOST LIKELY TO BE CLINICALLY DEPRESSED - US

% with moderate to severe depression



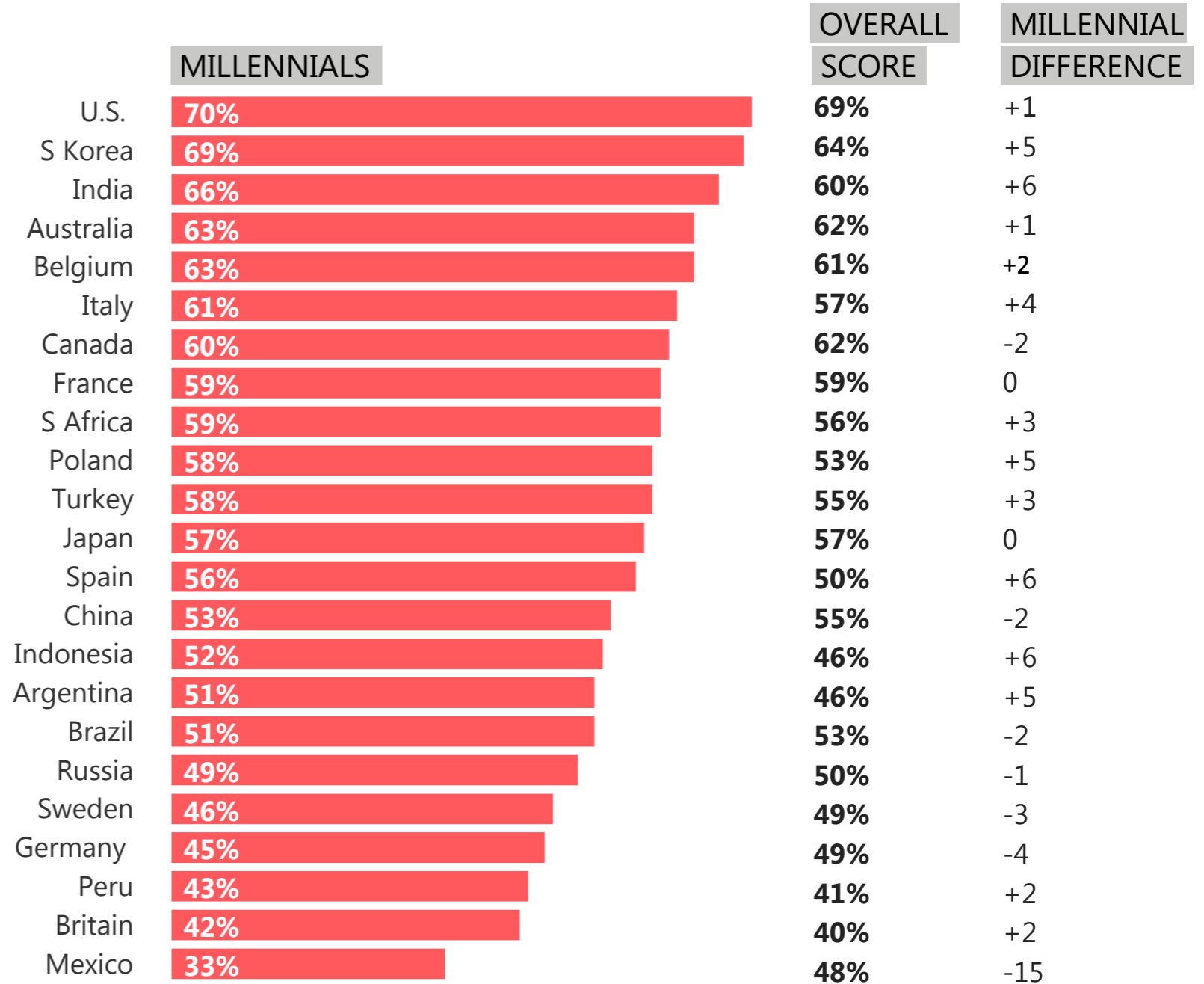
# 14.

## MILLENNIAL CHARACTERISTICS



# NARCISSISM VARIES ACROSS MARKETS

%“I have enough trouble worrying about my own problems without worrying about other people’s problems”





# MILLENNIALS JUST AS LIKELY TO VOLUNTEER - ENGLAND

% participate in voluntary activities at least once per month

