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

THE GENERATIONAL MAKE-UP OF THE UK

Pre-war
All adults aged over 72 (2016)

Baby Boomers
All adults aged 51 - 71 (2016)

Generation X
All adults aged 37 – 50 (2016)

Millennials
All adults aged 21 – 36 (2016)

Generation Z
All adults aged under 21 (2016)

Source: Eurostat/ONS Single Year of Age projections
Example one: A cohort effect

- Pre war (born before 1945)
- Baby boomers (born 1945-1965)
- Generation X (born 1966-1979)
- Millennials (born 1980 onwards)
Example two: A period effect

**GENERATIONAL EFFECTS: A SPOTTER’S GUIDE**

- Pre war (born before 1945)
- Baby boomers (born 1945-1965)
- Generation X (born 1966-1979)
- Millennials (born 1980 onwards)
Example three: A life cycle effect
THREE EFFECTS ON A POPULATION’S ATTITUDES AND BEHAVIOUR OVER TIME:

**COHORT EFFECT:**
A cohort has different views and these stay different over time

**LIFECYCLE EFFECT:**
Peoples’ attitudes change as they age – attitudes are shifted by life stages or events

**PERIOD EFFECT:**
Attitudes of all cohorts change in a similar way over the same period of time
## GLOBAL MILLENNIAL POPULATION

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Millennials (20-34)</td>
<td>36%</td>
<td>25%</td>
<td>28%</td>
<td>32%</td>
<td>38%</td>
<td>37%</td>
<td>49%</td>
</tr>
<tr>
<td></td>
<td>1.8bn</td>
<td>147m</td>
<td>75m</td>
<td>9m</td>
<td>157m</td>
<td>1.1bn</td>
<td>284m</td>
</tr>
<tr>
<td>Older (Aged 35+)</td>
<td>64%</td>
<td>75%</td>
<td>72%</td>
<td>68%</td>
<td>62%</td>
<td>63%</td>
<td>51%</td>
</tr>
<tr>
<td></td>
<td>3.1bn</td>
<td>438m</td>
<td>193m</td>
<td>18m</td>
<td>258m</td>
<td>1.9bn</td>
<td>294m</td>
</tr>
</tbody>
</table>

Proportion of Global adult (+20) population from older age groups
Millennials are judged harshly compared to Baby Boomers?

Top 5 words to describe:

**Millennials**
- 54% Tech-savvy
- 45% Materialistic
- 39% Selfish
- 34% Lazy
- 33% Arrogant

**Baby Boomers**
- 47% Respectful
- 41% Work-centric
- 32% Community-orientated
- 31% Well-educated
- 30% Ethical

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

2.

MONEY
MILLENIALS’ DISPOSABLE INCOME HAS SHRUNK

<table>
<thead>
<tr>
<th>Country</th>
<th>Aged 25-29</th>
<th>Aged 65-69</th>
<th>Aged 70-74</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>-2</td>
<td>62</td>
<td>66</td>
</tr>
<tr>
<td>Germany</td>
<td>-5</td>
<td>5</td>
<td>9</td>
</tr>
<tr>
<td>France</td>
<td>-8</td>
<td>28</td>
<td>25</td>
</tr>
<tr>
<td>USA</td>
<td>-9</td>
<td>28</td>
<td>25</td>
</tr>
<tr>
<td>Italy</td>
<td>-19</td>
<td>12</td>
<td>20</td>
</tr>
<tr>
<td>Australia</td>
<td>2</td>
<td>14</td>
<td>27</td>
</tr>
</tbody>
</table>

Source: Guardian analysis of Luxembourg Income Study data
% 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

<table>
<thead>
<tr>
<th>Country</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indonesia</td>
<td>82%</td>
<td>79%</td>
<td>84%</td>
</tr>
<tr>
<td>Peru</td>
<td>77%</td>
<td>77%</td>
<td>68%</td>
</tr>
<tr>
<td>China</td>
<td>74%</td>
<td>83%</td>
<td>78%</td>
</tr>
<tr>
<td>Brazil</td>
<td>68%</td>
<td>63%</td>
<td>64%</td>
</tr>
<tr>
<td>India</td>
<td>66%</td>
<td>79%</td>
<td>70%</td>
</tr>
<tr>
<td>S Africa</td>
<td>64%</td>
<td>59%</td>
<td>45%</td>
</tr>
<tr>
<td>Argentina</td>
<td>59%</td>
<td>63%</td>
<td>60%</td>
</tr>
<tr>
<td>US</td>
<td>56%</td>
<td>45%</td>
<td>43%</td>
</tr>
<tr>
<td>Mexico</td>
<td>55%</td>
<td>49%</td>
<td>55%</td>
</tr>
<tr>
<td>Sweden</td>
<td>51%</td>
<td>48%</td>
<td>60%</td>
</tr>
<tr>
<td>Germany</td>
<td>46%</td>
<td>47%</td>
<td>56%</td>
</tr>
<tr>
<td>Russia</td>
<td>44%</td>
<td>45%</td>
<td>54%</td>
</tr>
<tr>
<td>Spain</td>
<td>44%</td>
<td>39%</td>
<td>50%</td>
</tr>
<tr>
<td>Canada</td>
<td>43%</td>
<td>42%</td>
<td>50%</td>
</tr>
<tr>
<td>Poland</td>
<td>41%</td>
<td>39%</td>
<td>47%</td>
</tr>
<tr>
<td>Turkey</td>
<td>41%</td>
<td>45%</td>
<td>42%</td>
</tr>
<tr>
<td>Italy</td>
<td>38%</td>
<td>46%</td>
<td>59%</td>
</tr>
<tr>
<td>GB</td>
<td>36%</td>
<td>39%</td>
<td>56%</td>
</tr>
<tr>
<td>Australia</td>
<td>35%</td>
<td>34%</td>
<td>55%</td>
</tr>
<tr>
<td>Japan</td>
<td>29%</td>
<td>24%</td>
<td>32%</td>
</tr>
<tr>
<td>Belgium</td>
<td>22%</td>
<td>22%</td>
<td>29%</td>
</tr>
<tr>
<td>S Korea</td>
<td>22%</td>
<td>40%</td>
<td>54%</td>
</tr>
<tr>
<td>France</td>
<td>14%</td>
<td>18%</td>
<td>32%</td>
</tr>
</tbody>
</table>

MILLENNIALS MORE LIKELY TO IDENTIFY WITH MATERIALISTIC STATEMENTS - UK

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

Source: Ipsos MORI reanalysis of European Social Survey data
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

<table>
<thead>
<tr>
<th>Generation</th>
<th>Median Guess</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual</td>
<td>£315,000</td>
</tr>
<tr>
<td>Baby Boomers</td>
<td>£200,000</td>
</tr>
<tr>
<td>Generation X (born 1966-1979)</td>
<td>£138,000</td>
</tr>
<tr>
<td>Millennials (born 1980-1995)</td>
<td>£90,000</td>
</tr>
</tbody>
</table>

Source: Ipsos MORI/Kings College London data 2015
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 X: In 1998, when this generation’s average age was 27, approximately 55% owned their home.

Millennials: In 2014, when this generation’s average age was also 27, approximately 32% owned their home.

Source: Ipsos MORI reanalysis of British Social Attitudes Survey
GENERATION GAP IN HOMEOWNERSHIP IS LESS IN THE U.S. BUT STILL THERE

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

Generation X: In 1999, when this generation’s average age was 27, approximately 40% owned their home.

Millennials: In 2014, when this generation’s average age was also 27, approximately 38% owned their home.

Source: Ipsos MORI reanalysis of General Social Survey
MILLENNIALS IN GERMANY ARE ON A SIMILAR PATH TO HOMEOWNERSHIP TO GENERATION X

% home or flat owner

Base: c. 3,500 German adults per year; data points represent > 150 participants | Source: Ipsos MORI reanalysis of German General Social Survey (ALLBUS)
MILLENNIALS IN THE US ARE MUCH MORE LIKELY TO LIVE AT HOME

% living with parents

Generation X:
In 1998, when this generation’s average age was 27, approximately 18% lived with their parents

Millennials:
In 2014, when this generation’s average age was also 27, approximately 31% lived with their parents

Source: Ipsos MORI reanalysis of General Social Survey
THE SAME SHIFT CAN BE SEEN IN BRITAIN

% living with parents

Generation X:
In 1998, when this generation’s average age was 27, approximately 20% lived with their parents

Millennials:
In 2014, when this generation’s average age was also 27, approximately 31% lived with their parents

Source: Ipsos MORI reanalysis of British Social Attitudes Survey
4. EDUCATION
Millennials in Britain will be the biggest group of degree-holders

% who hold a degree

Generation X
In 2000, when Generation X were aged 18-34, 24% held a degree

Millennials
In 2014, when Millennials were aged 18-34, 29% held a degree

Source: Ipsos MORI reanalysis of British Social Attitudes Survey
WHEREAS IN THE US THEY ARE FOLLOWING GENERATION X’S LEAD

% who hold a degree

In 2000, when Generation X were aged 18-34, **22% held a degree**

In 2014, when Millennials were aged 18-34, **22% held a degree**

Source: Ipsos MORI reanalysis of General Social Survey
WORK
US MILLENNIALS WORK SLIGHTLY FEWER HOURS PER WEEK THAN GENERATION X AT EQUIVALENT POINT

Mean hours worked in a week

- **Pre-war (born pre 1945)**
- **Baby Boomer (born 1945-1965)**
- **Generation X (born 1966-1979)**
- **Millennial (born 1980-1995)**
- **Overall**

**Millennials**
In 2014, when this generation’s average age was 27, the average working week was **39.7 hours**

**Generation X**
In 1999, when this generation’s average age was 27, the average working week was **40.6 hours**

Source: Ipsos MORI reanalysis of General Social Survey
<table>
<thead>
<tr>
<th>Source: Ipsos MORI reanalysis of British Social Attitudes Survey and ALLBUS</th>
</tr>
</thead>
</table>

### Mean hours worked in a week

<table>
<thead>
<tr>
<th>GREAT BRITAIN</th>
<th>MILLENIALS (AGED 27)</th>
<th>GENERATION X (AGED 27)</th>
<th>DIFFERENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>40.4 hours</td>
<td>39.3 hours</td>
<td>1 hour 6 minutes less a week</td>
<td></td>
</tr>
<tr>
<td>40.0 hours</td>
<td>40.2 hours</td>
<td>12 minutes more a week</td>
<td></td>
</tr>
</tbody>
</table>
IT’S THE OLDER GENERATIONS WHO ARE JOB HOPPING MORE THAN PREVIOUSLY - US

Median years of tenure with current employer

<table>
<thead>
<tr>
<th>Age Group</th>
<th>2014</th>
<th>1983</th>
</tr>
</thead>
<tbody>
<tr>
<td>65+</td>
<td>10.3</td>
<td>13.2</td>
</tr>
<tr>
<td>55 to 64</td>
<td>10.4</td>
<td>13.6</td>
</tr>
<tr>
<td>45 to 54</td>
<td>7.9</td>
<td>10.2</td>
</tr>
<tr>
<td>35 to 44</td>
<td>5.2</td>
<td>5.8</td>
</tr>
<tr>
<td>25 to 34</td>
<td>3.0</td>
<td>5.8</td>
</tr>
<tr>
<td>16 to 24</td>
<td>1.3*</td>
<td>1.5</td>
</tr>
</tbody>
</table>
% say have increasing motivation at work

Source: Edenred Ipsos Barometer 2016
Main qualities of an ideal company

- **Rewards everyone’s efforts**
  - Under 30: 57%
  - 30 and over: 62%

- **Offers growth opportunities**
  - Under 30: 38%
  - 30 and over: 34%

- **Has management that cares about people**
  - Under 30: 34%
  - 30 and over: 40%

- **Offers pleasant working conditions**
  - Under 30: 33%
  - 30 and over: 30%

- **Offers greater flexibility of work organisation**
  - Under 30: 29%
  - 30 and over: 28%

- **Develops skills**
  - Under 30: 26%
  - 30 and over: 24%

- **Communicates transparently**
  - Under 30: 21%
  - 30 and over: 23%

- **Encourages individual initiative**
  - Under 30: 19%
  - 30 and over: 21%

- **Takes diversity into account**
  - Under 30: 12%
  - 30 and over: 10%

- **Is less hierarchical**
  - Under 30: 7%
  - 30 and over: 8%

Source: Edenred Ipsos Barometer 2016
6. SEX & MARRIAGE
FEWER MILLENNIALS ARE MARRIED, BUT THE AVERAGE AGE OF MARRIAGE HAS RISEN - UK

% who are married

Generation X in 1998
Average age: 27
Proportion married: 37%
Average age of first marriage:
• Men: 28.9
• Women: 27.0

Millennials in 2014
Average age: 27
Proportion married: 19%
Average age of first marriage (2013):
• Men: 31.6
• Women: 29.7

Source: Ipsos MORI analysis of Eurobarometer
SAME PATTERN IN THE US AND FRANCE

% who are married

<table>
<thead>
<tr>
<th>Generation X</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>IN 2000</td>
<td>IN 2014</td>
</tr>
<tr>
<td>(AGED 18-34)</td>
<td>(AGED 13-34)</td>
</tr>
<tr>
<td>U.S.</td>
<td></td>
</tr>
<tr>
<td>40%</td>
<td>32%</td>
</tr>
<tr>
<td>FRANCE</td>
<td></td>
</tr>
<tr>
<td>24%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Source: Ipsos MORI analysis of General Social Survey and Eurobarometer
THE AGE OF MARRIAGE HAS INCREASED WORLDWIDE

% mean age at first marriage by country

<table>
<thead>
<tr>
<th>Country</th>
<th>Gender</th>
<th>Mean Age of Marriage (1980-1)</th>
<th>Mean Age of Marriage (2010-12)</th>
<th>Difference (Years)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hungary</td>
<td>Men</td>
<td>24.8</td>
<td>34.0</td>
<td>+9.2</td>
</tr>
<tr>
<td></td>
<td>Women</td>
<td>21.0</td>
<td>31.8</td>
<td>+10.8</td>
</tr>
<tr>
<td>France</td>
<td>Men</td>
<td>25.1</td>
<td>33.6</td>
<td>+8.5</td>
</tr>
<tr>
<td></td>
<td>Women</td>
<td>23.0</td>
<td>32.0</td>
<td>+9</td>
</tr>
<tr>
<td>Sweden</td>
<td>Men</td>
<td>26.2</td>
<td>33.2</td>
<td>+7</td>
</tr>
<tr>
<td></td>
<td>Women</td>
<td>23.6</td>
<td>31.2</td>
<td>+7.6</td>
</tr>
<tr>
<td>Brazil</td>
<td>Men</td>
<td>25.5</td>
<td>31.9</td>
<td>+6.4</td>
</tr>
<tr>
<td></td>
<td>Women</td>
<td>22.7</td>
<td>29.7</td>
<td>+7</td>
</tr>
<tr>
<td>UK</td>
<td>Men</td>
<td>24.5</td>
<td>31.4</td>
<td>+6.9</td>
</tr>
<tr>
<td></td>
<td>Women</td>
<td>22.3</td>
<td>29.3</td>
<td>+7</td>
</tr>
<tr>
<td>Australia</td>
<td>Men</td>
<td>25.7</td>
<td>31.4</td>
<td>+5.7</td>
</tr>
<tr>
<td></td>
<td>Women</td>
<td>23.5</td>
<td>29.9</td>
<td>+6.4</td>
</tr>
<tr>
<td>S Africa</td>
<td>Men</td>
<td>27.8</td>
<td>31.2</td>
<td>+3.4</td>
</tr>
<tr>
<td></td>
<td>Women</td>
<td>25.7</td>
<td>28.0</td>
<td>+2.3</td>
</tr>
<tr>
<td>Japan</td>
<td>Men</td>
<td>28.7</td>
<td>31.2</td>
<td>+2.5</td>
</tr>
<tr>
<td></td>
<td>Women</td>
<td>25.1</td>
<td>29.7</td>
<td>+4.6</td>
</tr>
<tr>
<td>Rwanda</td>
<td>Men</td>
<td>25.0</td>
<td>26.6</td>
<td>+1.6</td>
</tr>
<tr>
<td></td>
<td>Women</td>
<td>16.7</td>
<td>24.4</td>
<td>+7.7</td>
</tr>
<tr>
<td>Indonesia</td>
<td>Men</td>
<td>24.1</td>
<td>25.7</td>
<td>+1.6</td>
</tr>
<tr>
<td></td>
<td>Women</td>
<td>20.0</td>
<td>22.3</td>
<td>+2.3</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>Men</td>
<td>23.8</td>
<td>25.7</td>
<td>+1.9</td>
</tr>
<tr>
<td></td>
<td>Women</td>
<td>17.6</td>
<td>21.2</td>
<td>+3.6</td>
</tr>
<tr>
<td>Mexico</td>
<td>Men</td>
<td>24.1</td>
<td>25.5</td>
<td>+1.4</td>
</tr>
<tr>
<td></td>
<td>Women</td>
<td>21.6</td>
<td>23.0</td>
<td>+1.4</td>
</tr>
<tr>
<td>India</td>
<td>Men</td>
<td>23.4</td>
<td>24.9</td>
<td>+1.5</td>
</tr>
<tr>
<td></td>
<td>Women</td>
<td>18.7</td>
<td>20.6</td>
<td>+1.9</td>
</tr>
</tbody>
</table>

Source: UN World Marriage data 2015; UK figures from Eurobarometer
### AGE AT FIRST CHILDBIRTH

<table>
<thead>
<tr>
<th>Country</th>
<th>US</th>
<th>UK</th>
<th>Germany</th>
<th>France</th>
<th>S Korea</th>
<th>Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>25.6</td>
<td>28.1</td>
<td>29.2</td>
<td>28.1</td>
<td>31.0</td>
<td>30.5</td>
</tr>
</tbody>
</table>

### DISTANCE FROM MILLENNIAL GENERATIONAL MIDPOINT (29 YEARS)

<table>
<thead>
<tr>
<th>Country</th>
<th>Distance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>-3.3</td>
</tr>
<tr>
<td></td>
<td>-0.9</td>
</tr>
<tr>
<td></td>
<td>+0.2</td>
</tr>
<tr>
<td></td>
<td>-0.9</td>
</tr>
<tr>
<td></td>
<td>+2.0</td>
</tr>
<tr>
<td></td>
<td>+1.5</td>
</tr>
</tbody>
</table>

Source: Central Intelligence Agency, The World Factbook
MILLENNIALS ARE MORE LIKELY TO HAVE MULTIPLE SEXUAL PARTNERS - US

% had sex with three or more people in last year

- Pre war (born before 1945)
- Baby Boomers (born 1945-1965)
- Generation X (born 1966-1979)

Source: Ipsos MORI reanalysis of National Health and Nutrition Examination Survey
BUT MILLENNIALS ARE ALSO MORE LIKELY TO BE ABSTINENT - US

% haven’t had sex in past four weeks

**Generation X**
- IN 2000: 19% (Average age 27)

** Millennials**
- IN 2014: 32% (Average age 27)

Source: Ipsos MORI reanalysis of National Health and Nutrition Examination Survey
MILLENIALS ARE MORE LIKELY TO IDENTIFY AS GAY OR BISEXUAL

% identifying as gay, lesbian or bisexual

USA
- Millennials (born 1980-1995): 8%
- Generation X (born 1966-1979): 5%
- Baby Boomers (born 1945-1965): 3%

UK
- Generation X (born 1966-1979): 2%
- Baby Boomers (born 1945-1965): 1%

MILLENNIALS MAKE UP 60% OF PORNHUB’S USERBASE

<table>
<thead>
<tr>
<th>Country</th>
<th>Millennials</th>
<th>Older generations</th>
</tr>
</thead>
<tbody>
<tr>
<td>World average</td>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>India</td>
<td>80%</td>
<td>20%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>74%</td>
<td>26%</td>
</tr>
<tr>
<td>South Korea</td>
<td>70%</td>
<td>30%</td>
</tr>
<tr>
<td>South Africa</td>
<td>69%</td>
<td>31%</td>
</tr>
<tr>
<td>Russia</td>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>Mexico</td>
<td>65%</td>
<td>35%</td>
</tr>
<tr>
<td>Poland</td>
<td>65%</td>
<td>35%</td>
</tr>
<tr>
<td>Brazil</td>
<td>62%</td>
<td>38%</td>
</tr>
<tr>
<td>U.K.</td>
<td>61%</td>
<td>39%</td>
</tr>
<tr>
<td>Canada</td>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>Australia</td>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>Argentina</td>
<td>58%</td>
<td>42%</td>
</tr>
<tr>
<td>U.S.</td>
<td>58%</td>
<td>42%</td>
</tr>
<tr>
<td>France</td>
<td>57%</td>
<td>43%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>57%</td>
<td>43%</td>
</tr>
<tr>
<td>Sweden</td>
<td>56%</td>
<td>44%</td>
</tr>
<tr>
<td>Germany</td>
<td>56%</td>
<td>44%</td>
</tr>
<tr>
<td>Italy</td>
<td>53%</td>
<td>47%</td>
</tr>
<tr>
<td>Belgium</td>
<td>52%</td>
<td>48%</td>
</tr>
<tr>
<td>Norway</td>
<td>51%</td>
<td>49%</td>
</tr>
<tr>
<td>Japan</td>
<td>48%</td>
<td>52%</td>
</tr>
<tr>
<td>Denmark</td>
<td>48%</td>
<td>52%</td>
</tr>
</tbody>
</table>

Source: Pornhub user data 2015
7.

TECHNOLOGY & MEDIA
FREQUENCY OF INTERNET USE HAS RISEN DRAMATICALLY ACROSS ALL GENERATIONS - UK

% using internet every day/almost every day

Source: Ipsos MORI reanalysis of ONS Opinions and Lifestyle Survey
ADOPTION RATES OF MOBILE INTERNET SIMILAR FOR MILLENNIALS AND GENERATION X - GB

% accessing internet via mobile phone


Base: c. 1000 British adults aged 15+  |  Source: Ipsos MORI Tech Tracker
MILLENNIALS SPEND 24 HOURS A WEEK ON THEIR SMARTPHONES -UK

Number of minutes spent on a smart phone per week

Aged 16-34 (roughly Millennials) 1457
Aged 35-54 (roughly Generation X) 639
Aged 55+ (roughly Baby Boomers and Pre-War Generation) 308
Adults 16+ 930

Base: 1,512 British adults  |  Source: Ofcom Digital Day 2016
## How Generations Use the Internet is Connected to Life Stage - UK

% doing each activity in the last three months

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sending and/or receiving emails</td>
<td>85%</td>
<td>89%</td>
<td>88%</td>
<td>85%</td>
</tr>
<tr>
<td>Social networking</td>
<td>48%</td>
<td>71%</td>
<td>62%</td>
<td>73%</td>
</tr>
<tr>
<td>Reading online news sites/newspapers</td>
<td>47%</td>
<td>62%</td>
<td>73%</td>
<td>76%</td>
</tr>
<tr>
<td>Finding information about goods or services</td>
<td>41%</td>
<td>40%</td>
<td>61%</td>
<td>59%</td>
</tr>
<tr>
<td>Consulting wikis to obtain knowledge or info</td>
<td>20%</td>
<td>39%</td>
<td>52%</td>
<td>55%</td>
</tr>
<tr>
<td>Uploading content created by you (text, photos, music, videos, software etc) to a website</td>
<td>39%</td>
<td>56%</td>
<td>68%</td>
<td>70%</td>
</tr>
<tr>
<td>Internet banking</td>
<td>1%</td>
<td>13%</td>
<td>40%</td>
<td>17%</td>
</tr>
<tr>
<td>Looking for a job or sending a job application</td>
<td>8%</td>
<td>19%</td>
<td>29%</td>
<td>28%</td>
</tr>
<tr>
<td>Selling goods or services</td>
<td>7%</td>
<td>12%</td>
<td>17%</td>
<td>20%</td>
</tr>
<tr>
<td>Posting opinions on civic or political issues via websites</td>
<td>6%</td>
<td>12%</td>
<td>17%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Source: Ipsos MORI reanalysis of ONS Internet Access Survey 2015
MILLENNIALS HAVE GROWN UP AND ARE USING INTERNET BANKING - UK

% used internet banking in past 3 months

Source: Ipsos MORI reanalysis of ONS Opinions and Lifestyle Survey
FACEBOOK HAS USERS OF ALL AGES – WHATSAPP AND INSTAGRAM ARE MORE “MILLENNIAL” - GB

% who use each social network

Facebook: 81% Millennials, 64% Generation X, 45% Baby Boomers, 12% Pre war

Instagram: 32% Millennials, 6% Generation X, 6% Baby Boomers, * Pre war

Twitter: 28% Millennials, 18% Generation X, 10% Baby Boomers, 3% Pre war

WhatsApp: 54% Millennials, 33% Generation X, 20% Baby Boomers, 1% Pre war

Base: c. 1,000 British adults aged 15+ | Source Ipsos MORI Tech Tracker 2016
BUT THERE ARE DIFFERENCES WITHIN THE MILLENNIAL GENERATION - GB

% who use each social network

- **Facebook**: 89% (Younger Millennials) vs 73% (Older Millennials)
- **YouTube**: 82% (Younger Millennials) vs 77% (Older Millennials)
- **Instagram**: 45% (Younger Millennials) vs 22% (Older Millennials)
- **Twitter**: 36% (Younger Millennials) vs 20% (Older Millennials)
- **SnapChat**: 40% (Younger Millennials) vs 14% (Older Millennials)

Base: c. 1,000 British adults aged 15+ | Source: Ipsos MORI Tech Tracker 2016
### ALL EXCEPT OLDEST AGE GROUP WATCH LIVE TV LESS

% change in live TV watching, 2014-2015

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

Source: Broadcasting Audience Research Board 2016
**LIVE TV WATCHING HAS DECLINED AMONG MILLENNIALS - UK**

Average daily live TV watching in minutes

- **Aged 16-24**
  - 2005: 157 minutes
  - 2015: 124 minutes

- **Aged 25-34**
  - 2005: 208 minutes
  - 2015: 162 minutes

- **All individuals (4+)**
  - 2005: 219 minutes
  - 2015: 216 minutes

- **Aged 65+**
  - 2005: 301 minutes
  - 2015: 342 minutes

Source: Ofcom Communications Market Reports 2005-2015
MILLENNIALS WATCH MORE ONLINE AND ON DEMAND - UK

Time spent watching different types of media by age

Source: Ofcom Communications Market Report, 2016
ATTITUDES TO STREAMING APPEAR GENERATIONAL - GB

% have streamed music in past three months

Base: c. 1,000 British adults aged 15+ | Source: Ipsos MORI Tech Tracker 2016
THERE IS NO ‘SHELF’ THAT DISTINGUISHES ‘DIGITAL NATIVES’ FROM THE REST

Proportion belonging to the most technical cluster by age

Base: c. 1,000 British adults aged 15+ | Source: Ipsos MORI Tech Tracker 2016
8. BRANDS & MARKETING
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

<table>
<thead>
<tr>
<th>Country</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>86%</td>
<td>86%</td>
<td>86%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>85%</td>
<td>80%</td>
<td>82%</td>
</tr>
<tr>
<td>S Africa</td>
<td>85%</td>
<td>88%</td>
<td>84%</td>
</tr>
<tr>
<td>India</td>
<td>84%</td>
<td>86%</td>
<td>85%</td>
</tr>
<tr>
<td>US</td>
<td>84%</td>
<td>82%</td>
<td>81%</td>
</tr>
<tr>
<td>Sweden</td>
<td>83%</td>
<td>88%</td>
<td>75%</td>
</tr>
<tr>
<td>Argentina</td>
<td>80%</td>
<td>84%</td>
<td>82%</td>
</tr>
<tr>
<td>Britain</td>
<td>79%</td>
<td>67%</td>
<td>69%</td>
</tr>
<tr>
<td>Australia</td>
<td>79%</td>
<td>78%</td>
<td>76%</td>
</tr>
<tr>
<td>Turkey</td>
<td>77%</td>
<td>79%</td>
<td>87%</td>
</tr>
<tr>
<td>Canada</td>
<td>77%</td>
<td>78%</td>
<td>80%</td>
</tr>
<tr>
<td>Brazil</td>
<td>77%</td>
<td>71%</td>
<td>79%</td>
</tr>
<tr>
<td>Peru</td>
<td>75%</td>
<td>84%</td>
<td>89%</td>
</tr>
<tr>
<td>Mexico</td>
<td>75%</td>
<td>76%</td>
<td>36%</td>
</tr>
<tr>
<td>Poland</td>
<td>74%</td>
<td>71%</td>
<td>69%</td>
</tr>
<tr>
<td>Spain</td>
<td>72%</td>
<td>74%</td>
<td>76%</td>
</tr>
<tr>
<td>Italy</td>
<td>71%</td>
<td>67%</td>
<td>73%</td>
</tr>
<tr>
<td>S Korea</td>
<td>70%</td>
<td>68%</td>
<td>71%</td>
</tr>
<tr>
<td>France</td>
<td>69%</td>
<td>65%</td>
<td>58%</td>
</tr>
<tr>
<td>Germany</td>
<td>68%</td>
<td>59%</td>
<td>52%</td>
</tr>
<tr>
<td>Russia</td>
<td>59%</td>
<td>55%</td>
<td>59%</td>
</tr>
<tr>
<td>Belgium</td>
<td>56%</td>
<td>62%</td>
<td>55%</td>
</tr>
<tr>
<td>Japan</td>
<td>53%</td>
<td>45%</td>
<td>45%</td>
</tr>
</tbody>
</table>

MILLENIALS 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

<table>
<thead>
<tr>
<th>Country</th>
<th>Millenials</th>
<th>Gen X</th>
<th>Millennial Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>86%</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>Indonesia</td>
<td>85%</td>
<td></td>
<td>+5</td>
</tr>
<tr>
<td>S Africa</td>
<td>85%</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>India</td>
<td>84%</td>
<td></td>
<td>+2</td>
</tr>
<tr>
<td>US</td>
<td>84%</td>
<td></td>
<td>+8</td>
</tr>
<tr>
<td>Sweden</td>
<td>83%</td>
<td></td>
<td>+11</td>
</tr>
<tr>
<td>Argentina</td>
<td>80%</td>
<td></td>
<td>-2</td>
</tr>
<tr>
<td>Britain</td>
<td>79%</td>
<td></td>
<td>+1</td>
</tr>
<tr>
<td>Australia</td>
<td>79%</td>
<td></td>
<td>-2</td>
</tr>
<tr>
<td>Turkey</td>
<td>77%</td>
<td></td>
<td>+3</td>
</tr>
<tr>
<td>Canada</td>
<td>77%</td>
<td></td>
<td>-5</td>
</tr>
<tr>
<td>Brazil</td>
<td>77%</td>
<td></td>
<td>+12</td>
</tr>
<tr>
<td>Peru</td>
<td>75%</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>Mexico</td>
<td>75%</td>
<td></td>
<td>+8</td>
</tr>
<tr>
<td>Poland</td>
<td>74%</td>
<td></td>
<td>+6</td>
</tr>
<tr>
<td>Spain</td>
<td>72%</td>
<td></td>
<td>+6</td>
</tr>
<tr>
<td>Italy</td>
<td>71%</td>
<td></td>
<td>+6</td>
</tr>
<tr>
<td>S Korea</td>
<td>70%</td>
<td></td>
<td>+6</td>
</tr>
<tr>
<td>France</td>
<td>69%</td>
<td></td>
<td>+6</td>
</tr>
<tr>
<td>Germany</td>
<td>68%</td>
<td></td>
<td>+6</td>
</tr>
<tr>
<td>Russia</td>
<td>59%</td>
<td></td>
<td>-3</td>
</tr>
<tr>
<td>Belgium</td>
<td>56%</td>
<td></td>
<td>+4</td>
</tr>
<tr>
<td>Japan</td>
<td>53%</td>
<td></td>
<td>+1</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>GENERATION X</th>
<th>MILLENNIALS</th>
</tr>
</thead>
<tbody>
<tr>
<td>IN 1999 (When aged 20-33)</td>
<td>IN 2015 (When aged 21-35)</td>
</tr>
<tr>
<td>BOYCOTTED A PRODUCT</td>
<td>CHOSE A PRODUCT/SERVICE BECAUSE OF COMPANY’S RESPONSIBLE BEHAVIOUR</td>
</tr>
<tr>
<td>17%</td>
<td>12%</td>
</tr>
<tr>
<td>17%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Source: Ipsos MORI Sustainable Business Monitor 1999 and 2015
MILLENNIALS MORE LIKELY TO PAY ATTENTION TO ADVERTS ACROSS ALL MEDIA - GB

% Pay a lot/a little attention

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tablet</td>
<td>16%</td>
<td>23%</td>
<td>29%</td>
</tr>
<tr>
<td>Mobile</td>
<td>18%</td>
<td>26%</td>
<td>34%</td>
</tr>
<tr>
<td>Laptop/desktop computer</td>
<td>24%</td>
<td>31%</td>
<td>35%</td>
</tr>
<tr>
<td>Radio</td>
<td>29%</td>
<td>36%</td>
<td>37%</td>
</tr>
<tr>
<td>Newspapers and magazines</td>
<td>35%</td>
<td>38%</td>
<td>40%</td>
</tr>
<tr>
<td>Outdoor ads/billboards</td>
<td>30%</td>
<td>38%</td>
<td>41%</td>
</tr>
<tr>
<td>Cinema</td>
<td>31%</td>
<td>41%</td>
<td>48%</td>
</tr>
<tr>
<td>TV</td>
<td>40%</td>
<td>47%</td>
<td>50%</td>
</tr>
</tbody>
</table>

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

% influenced by source to choose or continue using brands

- Personal experience
- Friends, family or known peers
- Social media
- Opinion leaders in traditional media
- Opinion leaders online
- Experts in traditional media
- Communication from the company in traditional media
- Communication from the company online

- Generation X (born 1966-1979)
- Baby Boomers (born 1945-1965)

Base: 10,061 US adults, online Jan 2016 | Source: Ipsos Loyalty 2015
MILLENNIALS ARE MORE LIKELY TO COMPLAIN AFTER A BAD EXPERIENCE WITH A COMPANY - US

% action after negative experience

Tell friends, family or colleagues
Complain in person to a member of staff
Write them a complaints letter
Complain to a customer advocate association (e.g. Better Business Bureau)
Share my bad experience via social media (e.g. Twitter, Facebook, Blogs / forums etc...)

Millennials 1980-1997
Generation X 1966-1979
Baby Boomers 1945 1965
Total

Base: 10,061 US adults, online Jan 2016 | Source: Ipsos Loyalty 2015
MILLENNIALS ARE ALSO MORE LIKELY TO GIVE POSITIVE FEEDBACK - US

% action after positive experience

Tell your friends and family about it
- Millennials 1980-1997: 60%
- Generation X 1966-1979: 55%
- Baby Boomers 1945-1965: 56%
- Total: 56%

Contact the company to thank them
- Millennials 1980-1997: 19.9%
- Generation X 1966-1979: 12%
- Baby Boomers 1945-1965: 14%
- Total: 15%

Write on social media to share your experience with others
- Millennials 1980-1997: 20.1%
- Generation X 1966-1979: 10%
- Baby Boomers 1945-1965: 5%
- Total: 10%

Start to use them more
- Millennials 1980-1997: 22.9%
- Generation X 1966-1979: 16%
- Baby Boomers 1945-1965: 13%
- Total: 17%

Do nothing about it
- Millennials 1980-1997: 29.1%
- Generation X 1966-1979: 34%
- Baby Boomers 1945-1965: 37%
- Total: 34%

Ipsos MORI
Social Research Institute

Base: 10,061 US adults, online Jan 2016 | Source: Ipsos Loyalty 2015
Generations X Spend: The Most Online - GB

Median spend per month by generation

- **Millennials**: £93
- **Generation X**: £133
- **Baby Boomers**: £100
- **Pre War**: £50

Source: Ipsos MORI analysis of ONS Internet Access 2016
Generations: Myths & Realities | May 2017 | Public

% Ordering food online in past 12 months


Base: c. 3,000 interviews per year, January – April each calendar year | Source: Ipsos MORI reanalysis of ONS Opinions and Lifestyle Survey
BUT MILLENNIALS JUST AS LIKELY TO SHOP FOR CLOTHES AND SPORTS GOODS ONLINE - GB

% ordering clothes or sports goods online in past 12 months


Base: c. 3,000 interviews per year, January – April each calendar year | Source: Ipsos MORI reanalysis of ONS Opinions and Lifestyle Survey
9. SOCIAL ATTITUDES
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

Source: Ipsos MORI reanalysis of British Social Attitudes Survey
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

Source: Ipsos MORI reanalysis of General Social Survey
ALL GENERATIONS AFTER PRE-WAR ARE SIMILARLY ACCEPTING OF HOMOSEXUALITY - GB

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

Source: Ipsos MORI reanalysis of British Social Attitudes Survey
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

Source: Ipsos MORI reanalysis of General Social Survey
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

Source: Ipsos MORI Issues Index
MILLENNIALS SLIGHTLY LESS LIKELY TO SUPPORT THE DEATH PENALTY IN THE US

% Favour the death penalty for persons convicted of murder

Source: Ipsos MORI reanalysis of General Social Survey
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

Source: Ipsos MORI reanalysis of British Social Attitudes Survey
MILLENIALS ARE MOSTLY ALIGNED TO THE NATIONAL SENTIMENT ON THE DEATH PENALTY

% supporting the death penalty for the most serious crimes

<table>
<thead>
<tr>
<th>Country</th>
<th>Score</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indonesia</td>
<td>88%</td>
<td>+2</td>
</tr>
<tr>
<td>India</td>
<td>81%</td>
<td>0</td>
</tr>
<tr>
<td>Mexico</td>
<td>79%</td>
<td>+14</td>
</tr>
<tr>
<td>S Africa</td>
<td>74%</td>
<td>-2</td>
</tr>
<tr>
<td>Peru</td>
<td>72%</td>
<td>-5</td>
</tr>
<tr>
<td>U.S.</td>
<td>71%</td>
<td>-3</td>
</tr>
<tr>
<td>S Korea</td>
<td>71%</td>
<td>+2</td>
</tr>
<tr>
<td>Brazil</td>
<td>69%</td>
<td>+1</td>
</tr>
<tr>
<td>Turkey</td>
<td>67%</td>
<td>+5</td>
</tr>
<tr>
<td>Russia</td>
<td>66%</td>
<td>-4</td>
</tr>
<tr>
<td>Poland</td>
<td>65%</td>
<td>-1</td>
</tr>
<tr>
<td>Japan</td>
<td>63%</td>
<td>-4</td>
</tr>
<tr>
<td>Argentina</td>
<td>62%</td>
<td>+6</td>
</tr>
<tr>
<td>France</td>
<td>61%</td>
<td>-1</td>
</tr>
<tr>
<td>Australia</td>
<td>57%</td>
<td>-1</td>
</tr>
<tr>
<td>Canada</td>
<td>52%</td>
<td>-3</td>
</tr>
<tr>
<td>Belgium</td>
<td>46%</td>
<td>-11</td>
</tr>
<tr>
<td>GB</td>
<td>45%</td>
<td>-2</td>
</tr>
<tr>
<td>Italy</td>
<td>44%</td>
<td>-1</td>
</tr>
<tr>
<td>Spain</td>
<td>41%</td>
<td>+3</td>
</tr>
<tr>
<td>Germany</td>
<td>40%</td>
<td>+2</td>
</tr>
<tr>
<td>Sweden</td>
<td>38%</td>
<td>+4</td>
</tr>
</tbody>
</table>

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

Source: Ipsos MORI reanalysis of General Social Survey
% have a gun or revolver in home/garage

Generation X
In 2000, when Generation X were 28 on average, 27% owned a gun

Millennials
In 2014, when Millennials were 27 on average, 26% owned a gun

Source: Ipsos MORI reanalysis of General Social Survey
10. POLITICS
MILLENNIALS HAVE CONSISTENTLY VOTED LESS THAN OLDER GENERATIONS

% claimed vote by generation


Source: Ipsos MORI reanalysis of British Election Survey
YOUNG ADULTS HAVE BECOME LESS LIKELY TO VOTE IN BRITAIN

% verified claimed vote by age group

Source: Ipsos MORI reanalysis of British Election Survey
**MILLENNAL TURNOUT IN BRITAIN NOT MUCH WORSE THAN GENERATION X WHEN THEY WERE THE SAME AGE IN 1997**

<table>
<thead>
<tr>
<th>Generation</th>
<th>Year</th>
<th>Average Age</th>
<th>Claimed Vote (%)</th>
<th>Gap Between Cohort and Average Turnout</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baby Boomers</td>
<td>1983 General Election</td>
<td>28</td>
<td>79</td>
<td>-4 pp</td>
</tr>
<tr>
<td>Generation X</td>
<td>1997 General election</td>
<td>27</td>
<td>65</td>
<td>-14 pp</td>
</tr>
<tr>
<td>Millennials</td>
<td>2015 General election</td>
<td>28</td>
<td>58</td>
<td>-15 pp</td>
</tr>
</tbody>
</table>

Source: Ipsos MORI reanalysis of British Election Survey

*Source: Ipsos MORI Social Research Institute*
There is a strong generational decline in party support in Britain.

% supporter of any one political party


Source: Ipsos MORI reanalysis of British Social Attitudes Survey
THE SAME GENERATIONAL PATTERN CAN BE SEEN IN FRANCE

% feel closer to a particular party than all other parties

Source: Ipsos MORI reanalysis of European Social Survey
MILLENNIALS ARE LESS LIKELY TO IDENTIFY AS DEMOCRAT OR REPUBLICAN - US

% close to one particular party (Democrat/Republican)

Source: Ipsos MORI reanalysis of General Social Survey
GENERATIONAL DECLINE IN PARTY IDENTIFICATION MEANS MILLENNIAL VOTES ARE NOT LOCKED IN

% feel closer/close to a particular party

UK

France

US

Source: Ipsos MORI reanalysis of British Social Attitudes Survey; General Social Survey and European Social Survey 2014
**MILLENIALS 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

![Graph showing trends over time for different generations.](image-url)

- **Pre war (born before 1945)**
- **Baby Boomers (born 1945-1965)**
- **Generation X (born 1966-1979)**
- **Millennials (born 1980-1995)**
- **Overall trend**

Source: Ipsos MORI reanalysis of British Social Attitudes Survey
## European Millennials are more likely to identify as left wing

<table>
<thead>
<tr>
<th></th>
<th>UK</th>
<th>Germany</th>
<th>France</th>
<th>Sweden</th>
<th>Spain</th>
<th>Italy</th>
<th>Ireland</th>
<th>Greece</th>
<th>Poland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Left wing</td>
<td>19%</td>
<td>20%</td>
<td>24%</td>
<td>39%</td>
<td>34%</td>
<td>26%</td>
<td>17%</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>Right wing</td>
<td>4%</td>
<td>5%</td>
<td>11%</td>
<td>10%</td>
<td>6%</td>
<td>15%</td>
<td>7%</td>
<td>14%</td>
<td>24%</td>
</tr>
<tr>
<td>'Net left'</td>
<td>+14</td>
<td>+15</td>
<td>+12</td>
<td>+29</td>
<td>+28</td>
<td>+12</td>
<td>+10</td>
<td>+6</td>
<td>-13</td>
</tr>
</tbody>
</table>

Base: Base sizes vary (c. 6,000 per country) | Source: Ipsos MORI analysis of Standard and Special Eurobarometer data, 2014
LABOUR IS THE MOST POPULAR PARTY FOR MILLENNIALS IN BRITAIN

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

Source: Ipsos MORI Political Monitor
THE MILLENNIAL VOTE IS MORE SPLINTERED IN GERMANY

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

Source: Ipsos MORI reanalysis of European Social Survey
11. RELIGION
MILLENNIALS ARE THE LEAST RELIGIOUS GENERATION - GB

% who do not identify with any religion

Source: Ipsos MORI reanalysis of British Social Attitudes Survey
Similarly, Millennials are the generation most likely to say they have no religion - US

% no religion

Source: Ipsos MORI reanalysis of General Social Survey
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

Source: Ipsos MORI reanalysis of British Social Attitudes Survey
### YOUNGER GENERATIONS ARE MORE LIKELY TO IDENTIFY WITH NON-CHRISTIAN RELIGION

% identify with religions by generation

<table>
<thead>
<tr>
<th></th>
<th>1994</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PRE-WAR</td>
<td>BABY BOOMER</td>
</tr>
<tr>
<td>NO RELIGION</td>
<td>22</td>
<td>43</td>
</tr>
<tr>
<td>CHRISTIAN</td>
<td>75</td>
<td>52</td>
</tr>
<tr>
<td>MUSLIM</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>HINDU</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

Ipsos MORI
Social Research Institute
12.

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

% high level of trust in businesses in general

- Indonesia: 80%
- India: 74%
- S Africa: 57%
- Sweden: 57%
- US: 57%
- Brazil: 48%
- Mexico: 46%
- Australia: 44%
- Italy: 43%
- Turkey: 42%
- Poland: 40%
- Germany: 37%
- Canada: 36%
- Japan: 36%
- Peru: 36%
- Russia: 36%
- Argentina: 32%
- GB: 29%
- Spain: 29%
- Belgium: 28%
- France: 25%
- S Korea: 19%

Base: 18,810 adults aged 16-64, 23 countries Sept - Oct 2016  |  Source: Ipsos Global Trends Survey 2017
THERE’S NO GENERATIONAL DECLINE IN TRUST IN THE POLICE - GB

% who trust the police to tell the truth

Source: Ipsos MORI Veracity Index

MILLENNIALS ARE MORE LIKELY TO TRUST CIVIL SERVANTS - GB

% who trust civil servants to tell the truth

Source: Ipsos MORI Veracity Index
MILLENNIALS HAVE HIGHER TRUST IN THE US GOVERNMENT

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

Source: PEW and NES surveys
MILLENNIALS ARE LESS LIKELY TO TRUST OTHER PEOPLE - GB

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

Source: Ipsos MORI Veracity Index
THERE’S A SIMILAR PATTERN IN THE US

% of most people can be trusted

Source: Ipsos MORI reanalysis of General Social Survey,
13. HEALTH & WELLNESS
MILLENNIALS ARE THE FIRST YOUNG GENERATION WHERE OVER HALF ARE OVERWEIGHT - ENGLAND

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

Generation X
at average age 26: healthy weight = 53%

Millennials
at average age 26: Healthy weight = 48%

Source: Ipsos MORI reanalysis of Health Survey for England
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)

Generation X
in 2000 healthy weight = 40%

Millennials
in 2014 healthy weight = 38%

Source: Ipsos MORI reanalysis of National Health and Nutrition Examination Survey (CDC)
## DAILY SUGAR CONSUMPTION IN THE UK

### National Diet & Nutrition Survey

<table>
<thead>
<tr>
<th>Age Group</th>
<th>2012 (Grammes)</th>
<th>2000 (Grammes)</th>
<th>2012 (Grammes)</th>
<th>2012 (Grammes)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>MILLENIALS NOW</strong></td>
<td>75g</td>
<td>65g</td>
<td><strong>GENERATION X NOW</strong></td>
<td>55g</td>
</tr>
<tr>
<td><strong>GENERATION X THEN</strong></td>
<td>65g</td>
<td><strong>BABY BOOMERS NOW</strong></td>
<td>53g</td>
<td></td>
</tr>
</tbody>
</table>

### Daily Sugar Consumption in UK National Diet & Nutrition Survey

**DAILY FREE SUGAR CONSUMED (GRAMMES)**

<table>
<thead>
<tr>
<th>Age 18-32</th>
<th>Age 33-46</th>
<th>Age 21-34</th>
<th>Age 47-67</th>
</tr>
</thead>
<tbody>
<tr>
<td>75g</td>
<td></td>
<td>65g</td>
<td>53g</td>
</tr>
</tbody>
</table>
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)

Generation X
at average age 26: current smoker = 36%

Millennials
at average age 26: current smoker = 29%

Source: Ipsos MORI reanalysis of Health Survey for England
BUT MILLENNIALS ARE GIVING SMOKING UP FASTER IN THE US

% current smoker (smoke every day/some days)

Source: Ipsos MORI reanalysis of National Health and Nutrition Examination Survey

0% 5% 10% 15% 20% 25% 30% 35% 40%


Generation X
at average age 29: current smoker = 31%

 Millennials
at average age 29: current smoker = 23%

In the US

Ipsos MORI
Social Research Institute

Source: Ipsos MORI reanalysis of National Health and Nutrition Examination Survey
THERE IS A STRICT GENERATIONAL PATTERN TO REGULAR ALCOHOL CONSUMPTION - ENGLAND

% drank alcohol on 5+ days/week

Generation X
at average age 26:
Drank alcohol 5+ days each week = 14%

Millennials
at average age 26:
Drank alcohol 5+ days a week = 6%

Source: Ipsos MORI reanalysis of Health Survey for England
ALTHOUGH MILLENNIALS MOST LIKELY TO DRINK HEAVILY WHEN THEY DO - ENGLAND

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

27.2
MILLENNIALS

24.4
GENERATION X

20.2
BABY BOOMERS

6.1
PRE-WAR

Source: Ipsos MORI reanalysis of Health Survey for England
NO DIFFERENCE BETWEEN GENERATIONS ON DRUG USE IN US

% ever used marijuana, cocaine, methamphetamines, heroin

Source: Ipsos MORI reanalysis of National Health and Nutrition Examination Survey (CDC)
BABY BOOMERS ARE THE MOST LIKELY TO BE CLINICALLY DEPRESSED - US

% with moderate to severe depression

Source: Ipsos MORI reanalysis of National Health and Nutrition Examination Survey (CDC)
14. MILLENNIAL CHARACTERISTICS
NARCISSISM VARIES ACROSS MARKETS

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

Bar chart showing the percentage of millennials who agree with the statement "I have enough trouble worrying about my own problems without worrying about other people’s problems" across different countries.

- U.S.: 70%
- S Korea: 69%
- India: 66%
- Australia: 63%
- Belgium: 63%
- Italy: 61%
- Canada: 60%
- France: 59%
- S Africa: 59%
- Poland: 58%
- Turkey: 58%
- Japan: 57%
- Spain: 56%
- China: 53%
- Indonesia: 52%
- Argentina: 51%
- Brazil: 51%
- Russia: 49%
- Sweden: 46%
- Germany: 45%
- Peru: 43%
- Britain: 42%
- Mexico: 33%

Overall Score:
- U.S.: 69% (+1)
- S Korea: 64% (+5)
- India: 60% (+6)
- Australia: 62% (+1)
- Belgium: 61% (+2)
- Italy: 57% (+4)
- Canada: 62% (+2)
- France: 59% (+3)
- S Africa: 56% (+5)
- Poland: 55% (+3)
- Turkey: 57% (+6)
- Japan: 50% (+6)
- Spain: 55% (+5)
- China: 46% (+6)
- Indonesia: 46% (+5)
- Argentina: 53% (-2)
- Brazil: 50% (-1)
- Russia: 49% (-3)
- Sweden: 49% (-4)
- Germany: 41% (+2)
- Peru: 40% (+2)
- Britain: 48% (-15)
- Mexico: 33% (-15)

% participate in voluntary activities at least once per month

16 to 25 (YOUNG MILLENNIALS)

32% Formal Volunteering
44% Informal Volunteering

26 to 34 (OLD MILLENNIALS)

21% Formal Volunteering
30% Informal Volunteering

35 to 49 (GENERATION X)

27% Formal Volunteering
32% Informal Volunteering

50 to 64 (YOUNG BOOMERS)

27% Formal Volunteering
29% Informal Volunteering

65 to 74 (OLDER BOOMERS)

31% Formal Volunteering
38% Informal Volunteering

75 and over (PRE WAR)

24% Formal Volunteering
36% Informal Volunteering

Source: Ipsos MORI reanalysis of Community Life Survey, 2015-2016