



# MENA's Millennials Decoded

A Glimpse Into MENA's Most  
Disruptive Generation

September 2018





# Introduction:

## MENA's Millennials Decoded

Millennials are the largest generation in history, and their impact on the world around them has been profound. In MENA the same holds true, with millennials making up over a quarter of the region's population\*, they are disrupting the status quo, and bringing about new trends and ideologies as well as a different way of living.

In order to better understand this generation of trend setters and leverage the potential offered by millennials, Ipsos in MENA launched “#Millennials”, the first and most comprehensive syndicated study in the region covering this segment.

#Millennials covered 8 key markets in MENA, and this report highlights the key trends that best define this generation, focusing on insights relating to their lifestyles, behaviors, and attitudes, which in turn enables brands to better understand and engage with this increasingly important segment.

\*Youth Policy – Middle East and North Africa: Youth Facts

# A Note On #Millennials

## How We Did It All?



8

Countries Across MENA

(KSA, Kuwait, UAE, Iran, Morocco, Tunisia,  
Egypt & Jordan)



5,600

Quantitative Interviews

20 Minute Face To Face Interviews with  
millennials Aged 18-35 Years



160

Qualitative Digital  
Immersions





# MENA's Millennials A Global Generation



# A Generation Without Borders

Millennials' shifting views are in part brought on by the fact that they are no longer confined to the borders of their respective countries or region, and are thus embracing new ideologies and trends that transcend MENA's borders. Increased exposure to the outside world has also altered their world view, with many sharing a more global outlook.

By being open to new cultures and keeping up to date with global affairs and trends, Millennials are introducing a new way of living that is changing the region's cultural attitudes.



**57%**  
Are Fascinated With Other  
Cultures And Enjoy  
Learning About Them



**55%**  
Make Sure They Are Always  
Updated About Global Affairs



**47%**  
Consider Themselves A Global  
Citizen Rather Than A Person  
Belonging To A Certain Group



# While Millennials Respect Their Traditions

## They're Not Afraid To Challenge The Status-Quo

Growing up immersed in their region's traditions, MENA's Millennials have acquired a strong sense of identity and pride. In fact, the majority are not ones to neglect their traditions and are eager to pass down values they have inherited onto younger generations. However, that is not to say that MENA's Millennials follow traditions blindly. As an increasingly global generation, they are open to change and are vocal against things they don't believe in. Many are even challenging certain traditions that they believe stand in the way of their country's progression. Ultimately, millennials are an empowered generation and are not hesitant to express themselves even if their opinions go against societal norms.



62%

Are Never Afraid To Express Their  
Opinions Even if It's Against  
Societal Norms



58%


Believe That It's Important To  
Pass Down Traditions



42%

Believe That Traditions Stand In  
The Way Of Progression



A man wearing a green long-sleeved shirt is sitting at a wooden table outdoors. He is using a laptop, and his right hand is giving a thumbs-up gesture. A white coffee cup is on the table to his left. The background is a blurred green landscape with sunlight filtering through the trees.

# MENA's Millennials

## A Connected Generation



# Millennials Are Increasingly Connected To The World Around Them

Perhaps one of the most defining qualities of millennials is their unparalleled affinity towards technology, with many growing up as digital natives. This has nurtured a very well connected generation which is transforming the way it interacts with the world. Many have taken advantage of the proliferation of online platforms to stay updated with news and information. They are also hungry for more digital lifestyles, and are happy to be "Always On".



**97%**  
Of MENA's  
Millennials Are  
On The Internet



**94%**  
Are Present On At  
Least One Social  
Media Platform



**56%**  
Are Always Looking For  
Ways To Integrate  
Technology Into Their Lives



**51%**  
Always Make Sure  
They Are Online &  
Connected



# They Are Trending Towards Living A Completely Digital Lifestyle

Millennials are the first generation to embrace a fully digitized lifestyle, with many seeking the assistance of technology in simple day to day chores and activities. Having the support of different gadgets and applications provides millennials with the convenience they need to accommodate an increasingly hectic lifestyle. That said, while some trends have gained more tractions than others, it is clear that millennials are always on the quest to find new ways to integrate technology into their lives.

Food Delivery  
Apps



43%

Ride Hailing  
Apps



40%

Exercise/Activity  
Apps



36%

Wearables



20%

Calorie Counting  
& Diet Apps



18%



# Pushing The Boundaries Of Commerce

## A Generation That Lives Online Shops Online



4 in 10

Millennials Shop Online



43%

Shop Through  
Shopping Websites



43%

Browse Something  
Online Before  
Purchasing In Store



27%

Shop Through  
Social Media

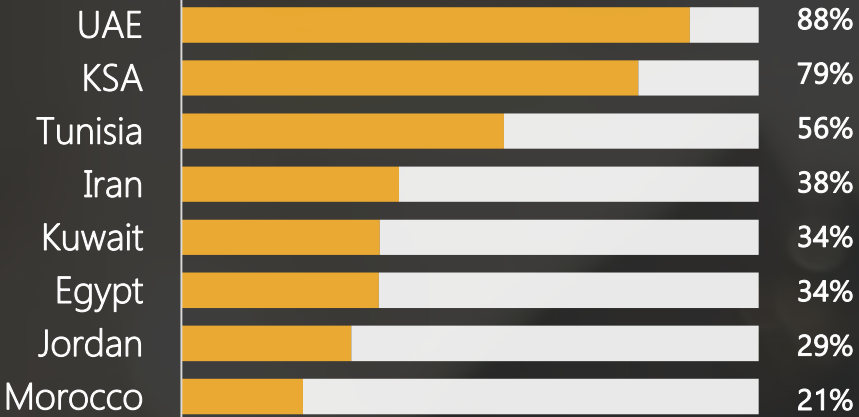


24%


Shop Through  
Mobile Apps

With increased reliance on technology and online platforms, it comes to no surprise that millennials' shopping behavior is transitioning as well. Although many still shop in-store, millennials in the region are increasingly opting to shop at the convenience of their own homes. The growth of online shopping is mostly driven by those in the GCC region, yet this is more a function of infrastructural and accessibility factors as opposed to attitudes.

Online shoppers mostly shop via e-commerce websites, yet 1 in 4 are shopping through social media. Even if shopping online isn't an option, many will browse online before purchasing in store, heavily depending on online platforms for information.





A background image showing two people from the chest down, holding and using smartphones. The person on the left is wearing a dark shirt, and the person on the right is wearing a black and white striped shirt. The image is framed by a thin orange border.

# MENA's Millennials

## An Engaged Generation



# Connectivity Has Lead To The Birth Of A Deeply Engaged Generation

MENA's millennials are not content with being passive observers, and have embraced social media platforms as vehicles to share their views with the people around them. They are active contributors online, and do so regularly, with many also engaging in online conversations. Furthermore, millennials are not only engaged socially with friends and friends, but are also following brand and product news and trends.



**78%**  
Share Content  
Online At Least  
Once A Week



**52%**  
Stay Connected  
With Friends &  
Family



**39%**  
Engage, Like &  
Comment On Other  
People's Posts



**35%**  
Stay Up-To-Date With  
Brands, Products &  
Latest Trends





# This Has Facilitated Unprecedented Levels Of Brand Engagement

Millennials have a strong desire to remain informed about brands and build closer relationships with them. Social media platforms have managed to bridge the gap between brands and consumers, making it easier for millennials to interact and stay updated with news about brands. Mainly through social media, millennials are getting in touch with their favorite brands, mostly to stay up to date with new products, promotions, and trends, as well as reading recommendations and reviews about the products and services they are interested in.



74%

Of Millennials Have  
Interacted With A Brand



## Top Reasons For Interacting:

To Stay Updated  
About Offerings &  
Products



46%

To Learn About  
Offers &  
Promotions



44%

To Learn About  
Latest News &  
Updates



26%

To Read Others'  
Reviews About A  
Product/Service



15%



## As A Result, Millennials Now Have Higher Expectations of Brands

While most of MENA's millennials are relatively loyal to their brands, with many also having a soft spot for the brands they grew up with, the plethora of options available has led a sizable portion of millennials to become more exploratory when it comes to brand selection. Importantly, the majority are also becoming less forgiving towards bad encounters with brands, irrespective of brand heritage and previous experiences. As such, winning the approval of the millennial consumer necessitates that brands consistently deliver on their promise and ensure positive experiences.



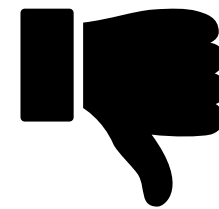
**58%**

Always Stick To The Brands They Know



**49%**


Always Buy The Brands They Grew Up With



**63%**

Are Not Willing to Give A Company They Had A Bad Experience With Another Chance





# MENA's Millennials

## An Informed Generation



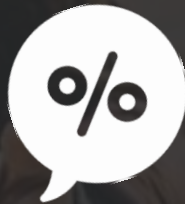
# Unlimited Information Access Means Millennials Are More Informed Than Ever

Increased connectivity also has a profound impact on millennials as consumers. Millennials are predominantly reliant on online platforms to obtain all the information they need to make smarter purchase decisions. Empowered by the wealth of information they have at their fingertips, millennials have become more vigilant and calculated when it comes to their purchases, with the majority of millennials seeking information and looking for the best deals prior to making a purchase.



**68%**

Rely On Online Sources  
To Get The Information  
They Need



**64%**

Always Look For The  
Best Offers & Deals  
Available



**60%**

Look For  
Information Before  
Making A Purchase



# With Information Comes Responsibility

## Making Millennials More Conscious Consumers

Being more informed and more engaged, millennials are also becoming more socially responsible consumers. They are starting to take note of CSR initiatives undertaken by brands, and also keeping tabs on how businesses behave more generally, and this is having an impact on their brand choices. Many millennials are also proudly recognizing and willing to support local emerging brands so long as they resonate with their ideals.



48%

Only Buy From Brands That Are Socially Responsible



45%

Prefer Buying From Local Brands And Supporting Local Businesses







# MENA's Millennials

## An Anxious Generation





# Millennials Have A Lot On Their Minds

Despite their significant impact on the region, millennials are a generation burdened by concerns. Their concerns go beyond those that impact their daily lives, such as the increasing cost of living, and unemployment. Millennials also care deeply about a wide range of social and political issues within their country, with corruption, violence, and moral deterioration topping a wide range of issues that worry them.

High Prices



31%

Unemployment



29%

Corruption



27%

Crime & Violence



21%

Deterioration Of Morals



17%



# This Generation Is Particularly Plagued By Financial Concerns

A firm belief exists amongst millennials in the region that older generations had it much easier when it comes to generating income and securing their livelihoods and futures.

Increased financial pressures are more likely to affect millennials starting families of their own, with the number of millennials burdened by debt being almost three times higher amongst older millennials when compared to their younger counterparts.

Furthermore, a significant number of millennials generally feel burdened by financial pressures, a feeling that translates into their lifestyles, and contributes to them being a cost conscious and price sensitive generation.



61%

Feel That It Was Easier For Older Generations To Make Money



41%

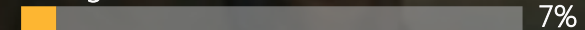
Feel Overwhelmed By Financial Burdens



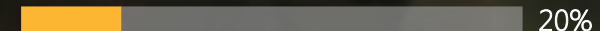
14%

Of Millennials Are In Debt

Younger Millennials In Debt



Older Millennials In Debt







# MENA's Millennials

## A Determined Generation



# Millennials Are Not Too Positive About Their Future



## Only 6 in 10

Millennials Are Optimistic About Their Future In Their Country



Despite varying differences across countries, there is a sizable chunk of millennials in MENA that is not optimistic about it's future, and in some cases, this group represents a majority.

While millennials in the GCC region hold a more optimistic view towards their future, the majority in some North African countries do not share the same sentiment. Even countries falling in between these two extremes have 4 in 10 millennials who are pessimistic about their future in their countries. With more challenging economic conditions a primary concern, millennials in the region are more wary of what the future holds for them.



# Yet They Remain Entrepreneurial And Place Heavy Emphasis On Their Careers

While they may not be very optimistic about their futures, with many currently unemployed, MENA's millennials are still entering the workforce with high aspirations. Whether it is their intentions of climbing the career ladder and achieving prominent positions, or their hopes and intentions of starting their own business, millennials are setting the bar high when it comes to their professional goals. There are gender specific differences however; older millennial women in particular are more likely to shift their focus on starting their own families as a priority, leading them to put their career aspirations on hold.



70%

Of Millennials Within Working Age Are Employed

Working Millennials  
By Gender:



Females  
39%



Males  
88%



71%

Consider Their Goal In Life Is To Achieve A Prominent Position In Their Careers



68%

Think That Starting Their Own Business Is Very Important





In Summary:

MENA's Millennials Decoded



# Mena's Millennials Decoded

## In Summary:

### A Global Generation:

Proud of their heritage, but not afraid to voice opinions that go against societal norms, Millennials see themselves as global citizens, and are open to exploring different cultures.

### A Connected Generation:

The majority are online and active on social media. They are embracing technology for their daily activities and hungry for more digital solutions. 4 in 10 are now shopping online.

### An Engaged Generation:

Millennials are active content generators, and most are engaging with their favorite brands online. While quite loyal, they will not tolerate negative brand experiences.

### An Informed Generation:

Online is their primary source of information. Millennials are active information seekers on brands, promotions, and trends. They are also more conscious and responsible shoppers.

### An Anxious Generation:

They are a generation that is plagued by financial concerns. Concerned about rising living costs and unemployment, they also worry about wider societal and political issues.

### A Determined Generation:

Despite not being too optimistic about their futures in their countries, they aspire to build successful careers. Many also hope to start their own business.





## GAME CHANGERS

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We are Game Changers

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