THE MILLENNIAL MINDSET
UNLOCKING A GENERATION OF POTENTIAL
MILLENIALS ARE COMING INTO THEIR OWN
MILLENNIALS HAVE GLOBAL STRENGTH IN NUMBERS

24% OF THE GLOBAL POPULATION

MILLENNIAL CHARACTERISTICS & VALUES
THE WE, MORE AND NOW GENERATION

- convenience
- healthy lifestyle
- added benefits
- control
- multi-taskers
- vocal / social
- connectivity
- authenticity
THE WE GENERATION
GIVES VIDEO GAME COMMENTARY

RUNS A $234 B COMPANY

$12M

$10.3M
I’M A **MULTI-TASKING** MASTER

I AM MORE LIKELY THAN BABY BOOMERS TO...

- Engage in social media while watching video programming: **2.4X**
- Browse the internet while watching video programming: **1.6X**

Source: Nielsen Global Digital Landscape Survey, Q3 2014
I HAVE SOMETHING TO SAY

I WATCH LIVE VIDEO PROGRAMMING CONTENT MORE IF IT HAS A SOCIAL MEDIA TIE IN

59% MILLENNIALS
30% BABY BOOMERS

I KEEP UP WITH SHOWS SO I CAN JOIN THE CONVERSATION ON SOCIAL MEDIA

62% MILLENNIALS
36% BABY BOOMERS
I’M PART OF A NETWORK

Percent likely to utilize/rent products or services from a share community

Source: Nielsen Global Survey of Share Communities, Q3 2013
THE MORE GENERATION
I WANT TO BE MORE INFORMED

I WANT TO SEE THE STORY BEHIND THE SCENES

80% MILLENNIALS

63% BABY BOOMERS

Source: The Cambridge Group
I WANT TO BE MORE INFORMED

I WANT TO KNOW MORE ABOUT HOW MY FOOD IS PRODUCED

81% MILLENNIALS

65% BABY BOOMERS

Source: The Cambridge Group
I WANT MY **FOOD TO DO MORE FOR ME**

7 food attributes that appeal to Millennials more than Boomers

- Fair Trade
- Organic
- Gluten-Free
- Caffeine-Free
- Portion Control
- Fortification
- High Protein

Source: Nielsen Global Health & Wellness Survey, Q3 2014
I WANT **BETTER** PRODUCTS

**Purchased a new product on last grocery shopping trip**

- **66%** **MILLENIALS**
- **41%** **BABY BOOMERS**

**Wish there were more premium products available**

- **21%** **MILLENIALS**
- **13%** **BABY BOOMERS**
I WANT COMPANIES TO DO MORE

51% 12%
CHECK THE PACKAGING LABELS TO ENSURE POSITIVE SOCIAL/ENVIRONMENT IMPACT

49% 13%
PREFER TO WORK FOR A COMPANY COMMITTED TO POSITIVE SOCIAL/ENVIRONMENT IMPACT

MILLENNIALS
BABY BOOMERS

Source: Nielsen Global Survey of Corporate Social Responsibility, Q1 2014
I‘M WILLING TO PAY FOR IT

% willing to pay more for foods with health benefits

81% MILLENNIALS
67% BABY BOOMERS

Source: Nielsen Global Health & Wellness Survey, Q3 2014
I’m WILLING TO PAY FOR IT

% willing to pay a premium for innovative new products

- MILLENNIALS
  - 48%
- BABY BOOMERS
  - 34%

Source: Nielsen Global New Product Innovation Survey, Q1 2015
I’m WILLING TO PAY FOR IT

% willing to pay more for sustainable brands

MILLENIALS

BABY BOOMERS

73%

51%

Source: Nielsen Global Survey of Corporate Social Responsibility, Q1 2014
I WANT **NEW PRODUCTS, JUST LIKE EVERYONE ELSE**

PURCHASED A NEW PRODUCT ON LAST GROCERY SHOPPING TRIP

- **GENERATION Z** (15-20): 62%
- **MILLENNIALS** (21-34): 66%
- **GENERATION X** (35-49): 53%
- **BABY BOOMERS** (50-64): 41%
- **SILENT GENERATION** (65+): 25%
THE NOW GENERATION
I’M ON THE GO, THEREFORE
I NEED TO BE CONNECTED EVERYWHERE

Source: Nielsen Global Digital Landscape, Q3 2014
TECHNOLOGY GETS ME WHAT I WANT, FASTER

Source: Nielsen Global E-commerce and the New Retail Survey, Q3 2014
AND WATCH WHAT I WANT,
WHEN I WANT IT

I am more likely than Baby Boomers to...

2X MORE LIKELY TO PAY FOR A PROVIDER FOR ONLINE PROGRAMMING

2.5X MORE LIKELY TO SAY THEY PLAN TO CANCEL SERVICE IN FAVOR OF ONLINE-ONLY

1.3X TO AGREE THAT TIME-SHIFTED PROGRAMMING BETTER ACCOMMODATES MY SCHEDULE

~2X AGREE THAT WATCHING VIDEO PROGRAMMING ON MY MOBILE DEVICE IS CONVENIENT

Source: Nielsen Global Video-on-Demand Survey, Q3 2015, Nielsen Global Digital Landscape, Q3 2014
MY MEALS ARE MOBILE

I EAT OUT AT LEAST ONCE A WEEK

- **58%** MILLENNIALS
- **29%** BABY BOOMERS

I EAT MOST OF MY DINNER MEALS ON THE GO OR WITH FRIENDS

- **16%** MILLENNIALS
- **4%** BABY BOOMERS

MY MEALS NEED TO KEEP UP WITH ME

**I prefer to eat at quick service restaurants**
- **Millennials**: 52%
- **Baby Boomers**: 41%

**I eat snacks as meal replacements**
- **Millennials**: 44%
- **Baby Boomers**: 31%

**I prefer to eat at street food vendors**
- **Millennials**: 28%
- **Baby Boomers**: 9%

Source: Nielsen Global Snacking Survey, Q1 2014, Nielsen Generational Lifestyle Survey, Q1 2015
TAKE ACTION!
Two thirds of F&B breakthrough innovation winners had a strategy of engaging millennials.

THE YOUNGER BRAIN

LIKES DYNAMIC STIMULI AND BRIGHT COLOR

HAS A GOOD SHORT-TERM MEMORY

BLEEDING OVER COMMUNICATION

IS GOOD AT MULTI-SENSORY PROCESSING

Source: Nielsen Neuro
MILLENNIALS TRUST
THE NEW AND TRADITIONAL

Source: Nielsen Global Trust in Advertising Survey, Q1 2015

BRANDED WEBSITES: 75%
ONLINE VIDEO ADS: 53%
ADS ON MOBILE DEVICES: 48%
TV: 67%
MAGAZINES: 62%
NEWSPAPERS: 62%
MINE THE MILLENNIAL OPPORTUNITY

USE THE NETWORK

ADD BENEFITS

SHARE YOUR STORY

GIVE CONTROL

CUSTOM ADS
ALIGN WITH THE VALUES & CHARACTERISTICS OF THE WE, MORE AND NOW GENERATION

- convenience
- healthy lifestyle
- added benefits
- control
- multi-taskers
- vocal / social
- connectivity
- authenticity
The Global Nielsen Survey was conducted between 2013 and 2015, and polled more than 30,000 online consumers in 61 countries throughout Asia-Pacific, Europe, Latin America, the Middle East/Africa and North America.

The sample includes Internet users who agreed to participate in this survey and has quotas based on age and sex for each country. It is weighted to be representative of Internet consumers by country. Because the sample is based on those who agreed to participate, no estimates of theoretical sampling error can be calculated. However, a probability sample of equivalent size would have a margin of error of ±0.6% at the global level. This Nielsen survey is based only on the behavior of respondents with online access. Internet penetration rates vary by country. Nielsen uses a minimum reporting standard of 60% Internet penetration or an online population of 10 million for survey inclusion.
## COUNTRIES INCLUDED

Country and Internet penetration

### ASIA-PACIFIC
- Australia: 93%
- China: 50%
- Hong Kong: 81%
- India: 30%
- Indonesia: 31%
- Japan: 91%
- Malaysia: 68%
- New Zealand: 94%
- Philippines: 43%
- Singapore: 82%
- South Korea: 92%
- Taiwan: 84%
- Thailand: 56%
- Vietnam: 50%

### EUROPE
- Austria: 83%
- Belgium: 85%
- Bulgaria: 57%
- Croatia: 75%
- Czech Rep.: 80%
- Denmark: 96%
- Estonia: 84%
- Finland: 94%
- France: 84%
- Germany: 88%
- Greece: 63%
- Hungary: 76%
- Ireland: 83%
- Israel: 75%
- Italy: 62%
- Latvia: 82%
- Lithuania: 82%
- Netherlands: 96%
- Norway: 96%
- Poland: 68%
- Portugal: 68%
- Romania: 56%
- Russia: 71%
- Serbia: 66%
- Slovakia: 83%
- Slovenia: 73%
- Spain: 77%
- Sweden: 95%
- Switzerland: 87%
- Turkey: 60%
- U.K.: 92%
- Ukraine: 43%

### MIDDLE EAST & AFRICA
- Egypt: 55%
- Morocco: 61%
- Pakistan: 15%
- Saudi Arabia: 66%
- South Africa: 49%
- UAE: 93%

### NORTH AMERICA
- Canada: 95%
- U.S.: 87%

### LATIN AMERICA
- Argentina: 80%
- Brazil: 58%
- Chile: 72%
- Colombia: 59%
- Mexico: 49%
- Peru: 53%
- Venezuela: 62%

NIELSEN GLOBAL REPORTS REFERENCED

- Nielsen Global Video-on-Demand Survey, Q3 2015
- Nielsen Global New Product Innovation Survey, Q1 2015
- Nielsen Global Health and Wellness Survey, Q3 2014
- Nielsen Generational Lifestyle Survey, Q1 2015
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- Nielsen Global Survey of E-Commerce, Q1 2014
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- Nielsen Global Trust in Advertising Survey, Q1 2015
- Global Snacking Survey, Q1 2014
OTHER NIILESEN SOURCES & CONTACTS

- The Cambridge Group: Linda.Deeken@nielsen.com
- 2015 U.S. Breakthrough Innovation Report
- 2015 China Breakthrough Innovation Report
- 2015 India Breakthrough Innovation Report
- 2015 Europe Breakthrough Innovation Report
EXTERNAL RESOURCES

- http://www.census.gov/population/international/data/idb/worldpop.php
- http://www.internetlivestats.com/one-second/#traffic-band