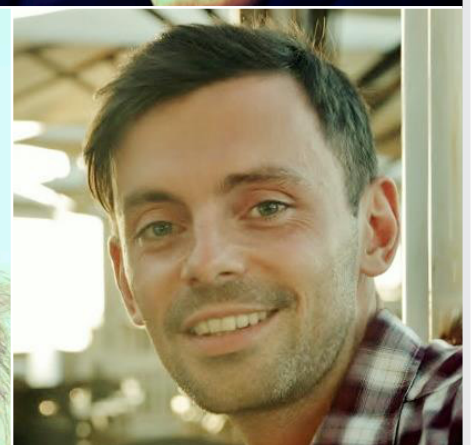




JWT | MEET THE BRIC MILLENNIALS



September 2013

WHAT WE'LL COVER

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A note to readers: To make the report easy to navigate, we've added hyperlinks to this page and the Meet the BRIC Millennials page so you can jump immediately to the items that most interest you (or, alternatively, you can read the material straight through).

This is a report from JWTIntelligence. Go to [JWTIntelligence.com](https://www.jwtintelligence.com) to download this and other trend research.

INTRODUCTION

A dozen years after the term BRIC was coined, we decided to zone in on the generation that will be defining the future of these markets, which together comprise around 40% of the global population. Millennials in Brazil, Russia, India and China have come of age during a unique time, during which their countries have experienced both unprecedented growth and the repercussions of a worldwide slowdown, globalization and the digital revolution.

This generation will call on their distinct set of experiences and tools as they help to shape the future of nations that, as one bullish forecast suggests, could together overtake the G7 economies in less than 15 years. More conservative forecasters don't foresee the BRIC group hitting this milestone until at least 2050; growth has slowed—with some warning of hard landings ahead—and a range of enduring challenges are proving intractable. But there's still plenty of optimism surrounding these markets, and rich potential for growth.

This study focuses in on some themes we've examined in the context of Millennials in the developed world, including personal finances and employment, stress, changing gender roles, social good and social media. We've also focused on issues that are especially relevant to Millennials in BRIC nations, in particular tradition vs. modernization, urbanization and national pride.

Millennials are regarded as the first global generation, with more overlapping values and shared experiences than any before them. As our wide-ranging study details, in some respects Millennials across BRIC markets are very closely aligned, while in others they diverge wildly in their outlook thanks to unique national conditions and traditions. Here, we spotlight those commonalities and differences, along with some case studies that show how brands are responding to these increasingly influential young consumers.

TOPLINE FINDINGS

- Like their counterparts around the world, BRIC Millennials are optimistic on most counts; uniquely resourceful and entrepreneurial, using technology as a steppingstone; and civic-minded by nature.
- Millennials around the world have felt the sting of economic uncertainty, and young BRIC citizens are no exception. But they're upbeat about their economic future and have adjusted their outlook to today's economic realities, with many feeling that spending wisely is more important than earning a lot of money.
- Accustomed to voicing their opinions on social media, Millennials in Brazil, Russia and India want to express their views on social problems and their government, and to engage with their leaders. This is especially true in Brazil. Indians are relatively the most positive about their government and political leaders.
- This generation sees many life choices (choosing what to study and where, choosing where to live, etc.) as being more complicated today than they were in the 1960s, with Brazilian Millennials as the exception.
- As the BRIC markets become more globalized, many long-standing cultural norms are being upended. Russian, Chinese and Indian Millennials are looking to preserve their cultural traditions; they feel traditions hold society together. Brazilians, by contrast, seem to have the most progressive mindset. Indeed, this cohort has far fewer taboos than their counterparts in Russia, India and China.
- BRIC Millennials identify with cultures around the globe. More than half say they have friends from all over the world. Many appreciate the influence of other cultures on their way of life, and almost 6 in 10 see themselves as a global citizen first and a citizen of their homeland second.
- Life is getting more stressful for these Millennials, with 53% saying their stress level has increased over the past year. Their finances and the cost of living are the chief stressors, and the highly competitive job market is also a key concern in Brazil, India and China. Pollution, food safety and climate change stand out as major concerns in China.

TOPLINE FINDINGS (cont'd.)

- BRIC Millennials feel responsible for leaving the world in better shape for future generations, and a wide majority feels there's a need to balance out the inequalities of the world.
- When it comes to homosexuality, Brazilian Millennials are the most open and accepting. But Chinese respondents slightly surpass Brazilians in acceptance of same-sex marriage.
- While marriage is still valued among many young people in the BRIC markets, this cohort doesn't necessarily see it as essential, especially in the near future. Almost 6 in 10 are comfortable with the idea of not getting married. More than 4 in 10 are open to pursuing parenthood without a spouse.
- Indian Millennials are the most engaged with social media, followed by Chinese and Brazilians; Russians are by far the least engaged.





METHODOLOGY

This report is the result of quantitative, qualitative and desk research conducted by JWTIntelligence throughout the year. Specifically for this report, we conducted quantitative surveys in Brazil, Russia, India and China using SONAR™, JWT's proprietary online tool, from July 3-8, 2013. We surveyed a total of 1,640 Millennials aged 18-35 (385 Brazilians, 416 Russians, 455 Indians and 384 Chinese). Data is weighted to be representative of Internet users in each market.

We also received input from JWT planners and researchers in each market surveyed.

WHO ARE THE BRIC MILLENNIALS?

In each of these markets, our sample is representative of the Internet users in each nation.

	 BRAZIL	 RUSSIA	 INDIA	 CHINA
TOTAL POPULATION	201 million	142.5 million	1.2 billion	1.3 billion
MEDIAN AGE OF POPULATION, IN YEARS	30.3	38.8	26.7	36.3
MILLENNIALS AS PERCENTAGE OF TOTAL POPULATION	30%	27%	30%	28%
MILLENNIALS AS PERCENTAGE OF TOTAL INTERNET USERS*	54%	61%	75%	58%

See the following four pages for demographic details on our Millennial respondents.



BRAZIL MILLENNIAL PROFILE





RUSSIA MILLENNIAL PROFILE

25%
SOME
COLLEGE

56%
COLLEGE
GRADUATE

14%
HIGH
SCHOOL
GRADUATE



58%
LIVING
WITH
IMMEDIATE
FAMILY

33%
LIVING IN
A HOME OR
APARTMENT
ON THEIR
OWN



7%
IN A
RELATIONSHIP
BUT NOT LIVING
TOGETHER

15%
IN A
RELATIONSHIP
AND LIVING
TOGETHER



57%
EMPLOYED
FULL-TIME



4%
FREELANCE/
SELF-
EMPLOYED

57%
MARRIED



71%
VK



53%
FACEBOOK

34%
GOOGLE+

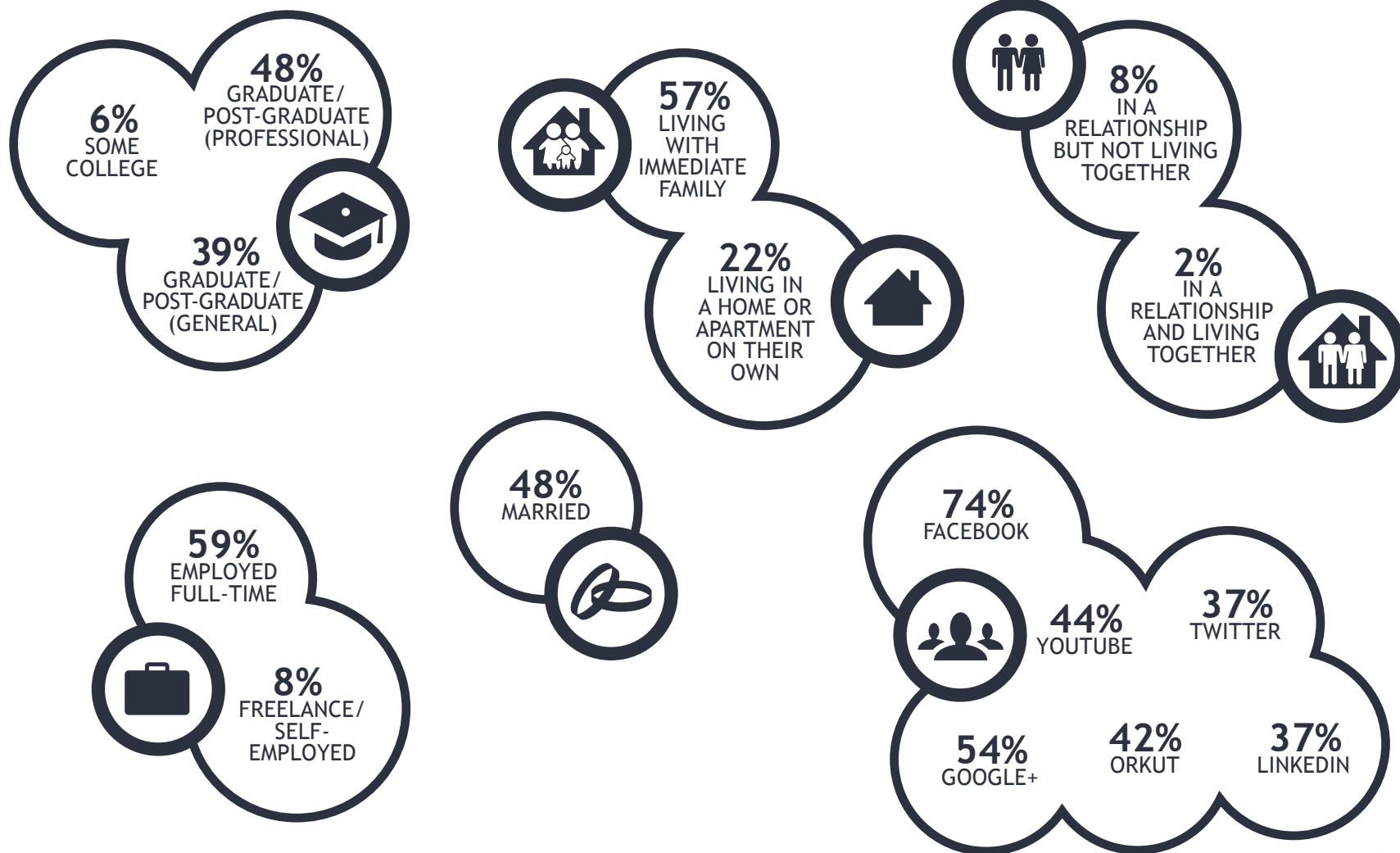
67%
MAIL.RU

59%
ODNOKLASSNIKI.RU

34%
YOUTUBE

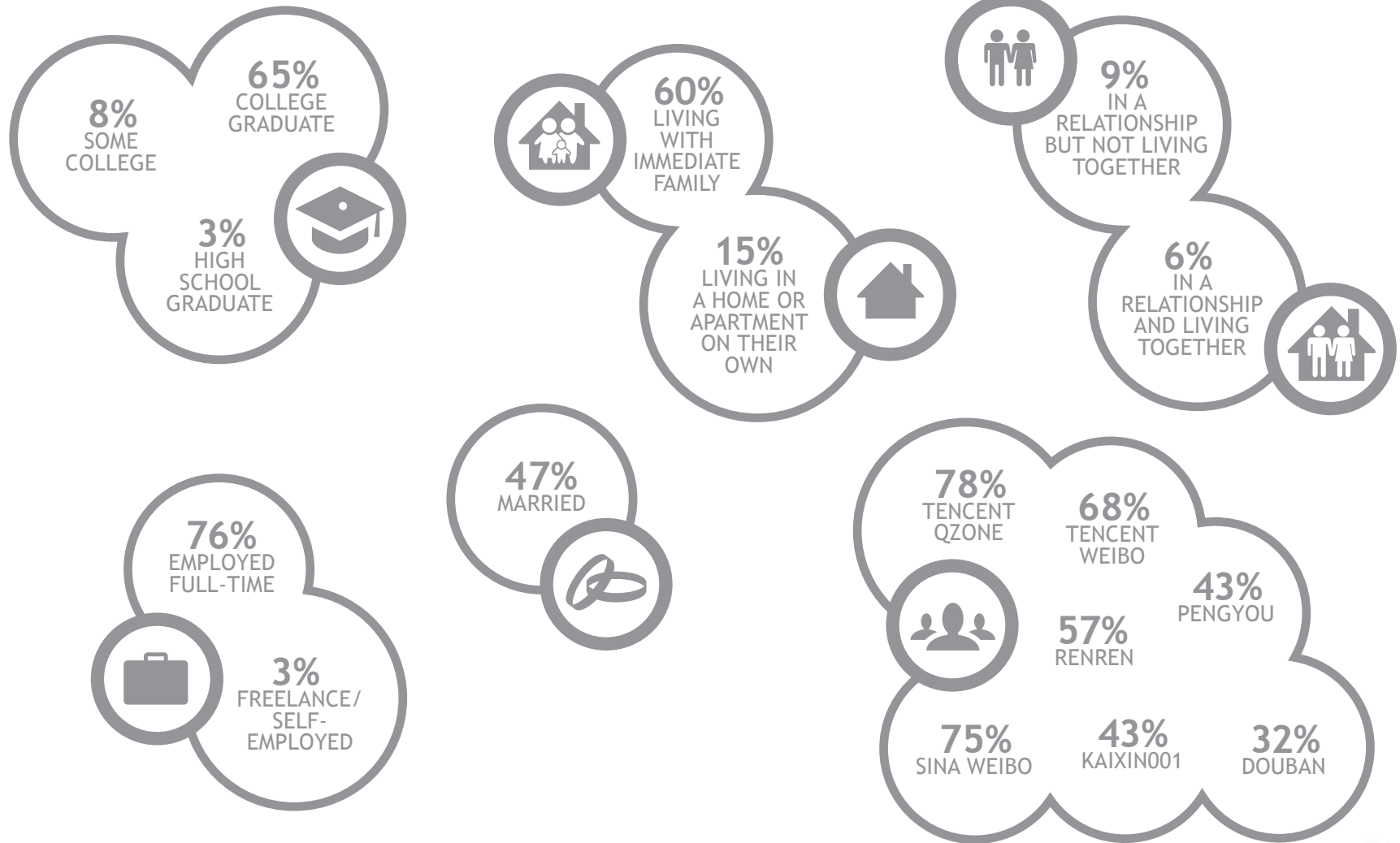


INDIA MILLENNIAL PROFILE





CHINA MILLENNIAL PROFILE



MEET THE BRIC MILLENNIALS



PERSONAL FINANCES AND EMPLOYMENT

- Bullish about personal finances
- Money matters
- Investing in the future
- “It’s not fair”
- “I’ll pave my own way”
- Working for more than a paycheck
- Tech empowers
- The grass is always greener



GOVERNMENT, ACTIVISM AND NATIONAL PRIDE

- Wary of government
- Making their voices heard
- BRICs on the world stage
- BRIC national pride



TRADITION VS. MODERNIZATION

- “I’ll never be like my parents”
- No nostalgia for Brazilians
- Nostalgia for a less complicated life
- Traditions endure for most
- Traditions worth saving
- Because society says no
- Living in an interconnected world



STRESS AND URBANIZATION

- Living a stressful life
- The double-edged sword of the city



CHANGING GENDER ROLES

- Gender equality within reach
- Changing gender roles



RELATIONSHIPS, RELIGION AND SOCIETY

- Extending their single years
- Friends as family
- Religion and young people
- Race relations
- LGBT issues



SOCIAL GOOD

- Heal the world
- DIY activism



SOCIAL MEDIA

- Broadcasting the curated self
- Social media-driven FOMO
- Share no more

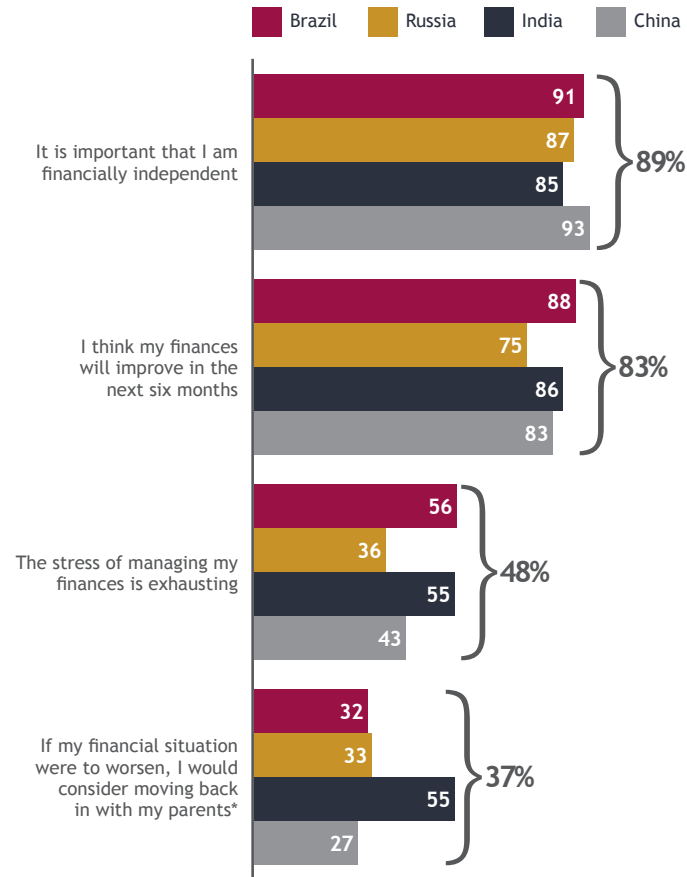
PERSONAL FINANCES AND EMPLOYMENT



BULLISH ABOUT PERSONAL FINANCES



FIGURE 1A:
Outlook on personal finances
Percentage of BRIC Millennials who agree



BULLISH ABOUT PERSONAL FINANCES (cont'd.)



Financial independence is a near-universal desire, with almost 9 in 10 BRIC Millennials saying it is important for them. Pointing to the relentless optimism of this generation, some 83% feel confident their finances will improve in the next six months. Russian Millennials are slightly less bullish than the rest, with 3 out of 4 optimistic about their financial future. This optimism isn't blind—almost half of Millennials feel exhausted by the stress of managing their finances, and more than half of Brazilian and Indian respondents.



SPOTLIGHT ON BRAZIL

Brazilians' stress around managing finances (see Figure 1A) stems from the fact that Millennials are the first generation to see financial management as providing the groundwork for a future with more freedom and flexibility. Brazilian youth are just beginning to embrace saving and financial planning—to strive for financial literacy.

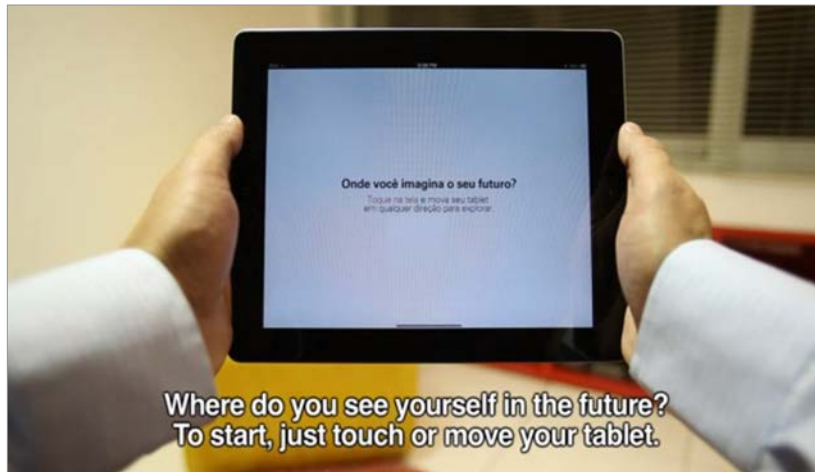
Years of inflation prevented a saving culture from taking hold among previous generations—the hyperinflation of the '80s made any investment seem like a bad idea. At the same time, rampant spending was risky as it was impossible to predict how much one's money would be worth in the near future.

Millennials have come of age during a decadelong period of economic stabilization and growth. There's a prevailing sense of optimism around finances—Millennials feel that if they spend now, they can simply earn back the money in a few months. And since the future seems bright, there is less guilt in fulfilling today's wishes in spite of tomorrow's duties; young Brazilians believe more in investing in themselves than saving for a theoretical future problem (see Figure 1B on page 19).

BULLISH ABOUT PERSONAL FINANCES (cont'd.)



CASE STUDY: HSBC, IPAD 360°

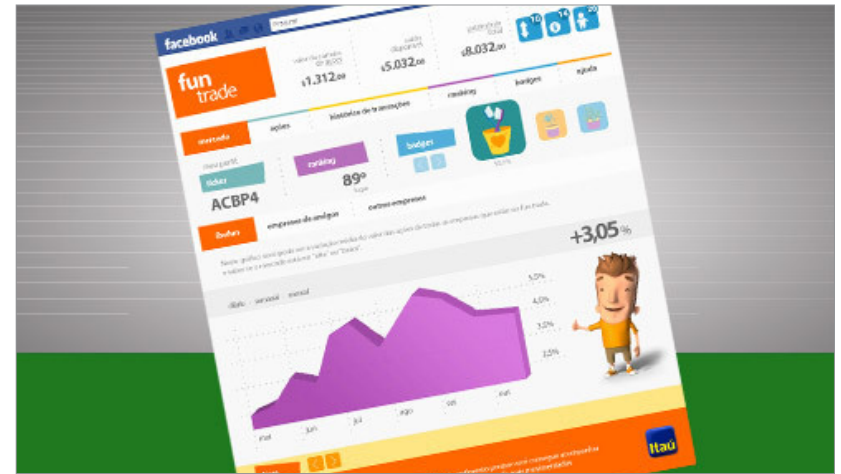


To help inspire young Brazilians to think about smart financial planning, an HSBC Wealth Management campaign for the iPad illustrated a future with more options. JWT created an app that asked, “Where do you want to be in the future?” and then showed 360-degree environments of potential locations, including a Paris penthouse and, from a scuba diver’s perspective, an undersea paradise. Users could navigate through these scenarios as if they were really there. The message: “Wherever you want to be in the future, you can count on the help of HSBC Wealth Management.”

BULLISH ABOUT PERSONAL FINANCES (cont'd.)



CASE STUDY: ITAÚ, FUN TRADE



Last year, Brazilian bank Itaú introduced Fun Trade, a Facebook gaming app designed to teach participants about the stock market. Players were encouraged to buy and sell shares of companies, represented by their friends and other players. To start, players published an IPO on their Facebook wall. Shares changed in value depending on supply and demand and as players received more interactions.

BULLISH ABOUT PERSONAL FINANCES (cont'd.)



SPOTLIGHT ON INDIA

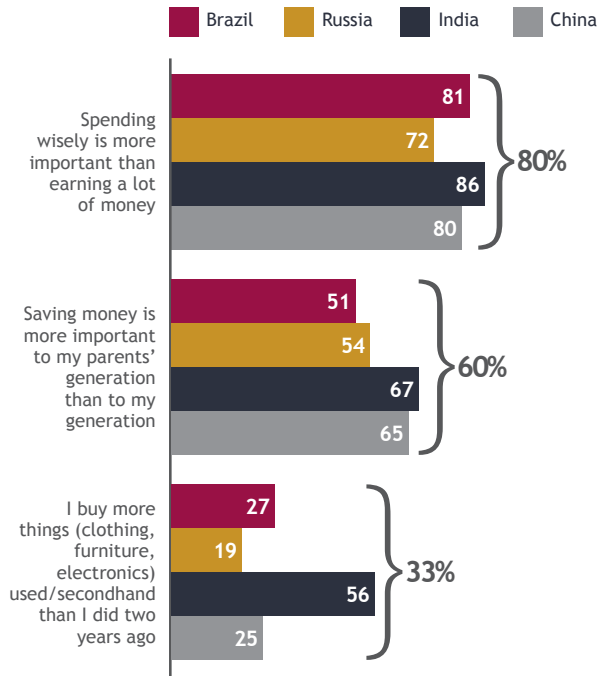
Indian Millennials living away from home fall well above the average (37%) when asked if financial reasons might prompt them to consider moving back in with their parents: 55% are in agreement. (See Figure 1A.) The family unit remains a cultural pillar in India, where multigenerational households are the rule and moving out of the family home upon adulthood is not a mainstream phenomenon.

Young Indians take pride in caring for and giving back to their parents; 86% agreed that “It is important to me that I’m able to provide financial support for my parents” compared with an overall average of 79%.

MONEY MATTERS



FIGURE 1B:
Money-mindedness
Percentage of BRIC Millennials who agree



“Spending wisely” doesn’t equate with penny-pinching for these consumers, especially in India and China. BRIC Millennials are more inclined to spend than their parents, with 6 in 10 saying that saving money is more important to their parents’ generation than to their own.

Eight in 10 agreed that spending wisely is more important than earning a lot, with Indian Millennials most likely to agree. This cohort has also taken to buying used or secondhand items in the recent past (56% of Indian Millennials compared with 32% of BRIC Millennials overall). eBay and websites including Quikr and OLX have popularized the buying and selling of secondhand goods, taking advantage of Indians’ tendency not to toss out older items but to mend or find new uses for them. Young, cash-strapped Indians prefer buying high-end used goods to lower-end new products.

In Russia, where only a slim majority agree that saving money is more important to their parents’ generation, the collapse of the Soviet Union drove a wave of spending, thanks to an influx of new goods into the market. An era of easy credit, especially for young people, followed in the early ’00s. The economic crisis has shifted consumer behavior—after nearly two decades of wild consumerism, the market has experienced some stabilization. Loans are taken wisely, if at all, and Millennials are much more rational in their spending.

INVESTING IN THE FUTURE



FIGURE 1C:

What constitutes a good investment?

Percentage of BRIC Millennials who believe each of the following would be a good investment

■ Brazil ■ Russia ■ India ■ China

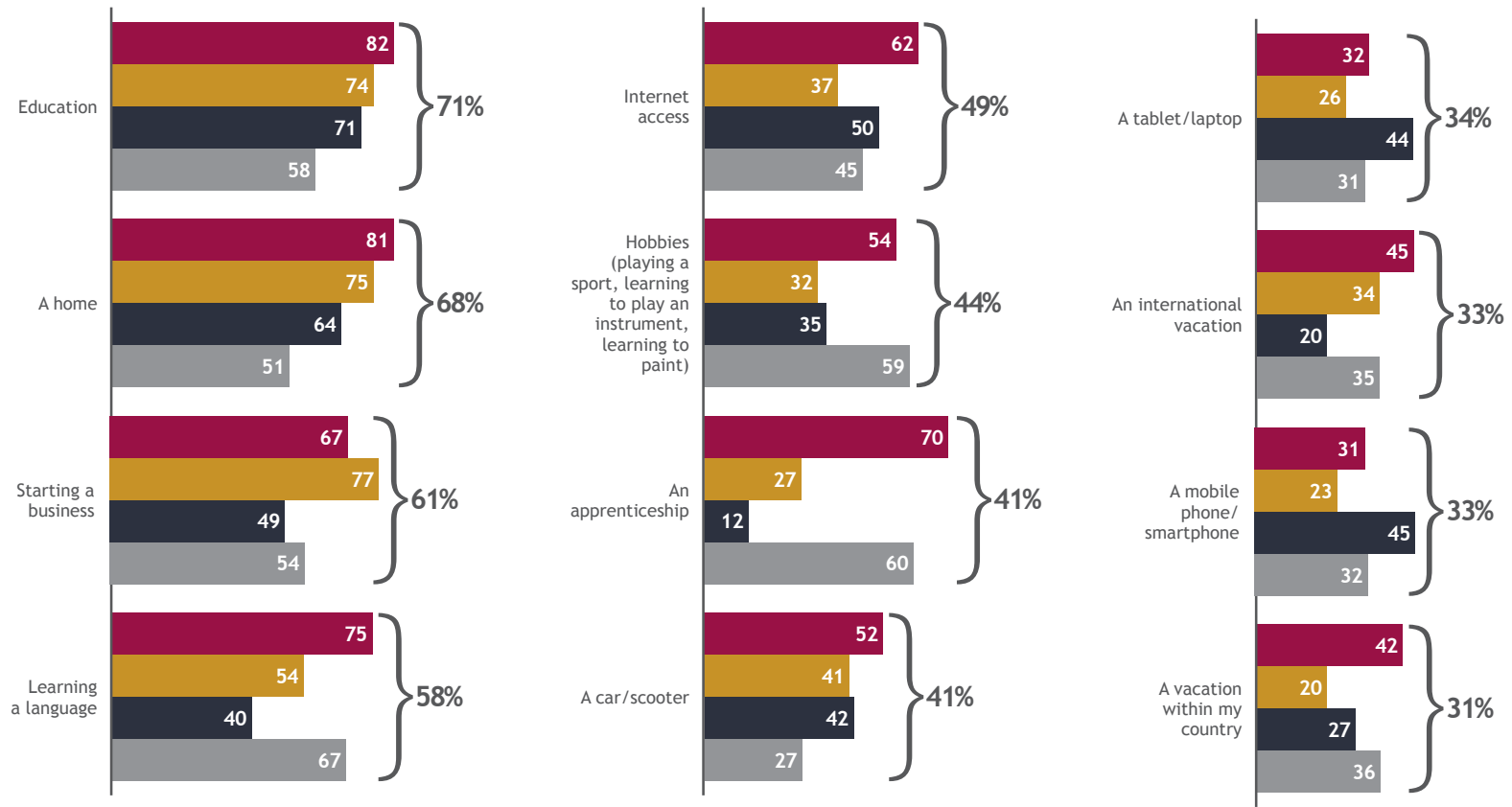


CHART CONTINUES ➔

INVESTING IN THE FUTURE (cont'd.)

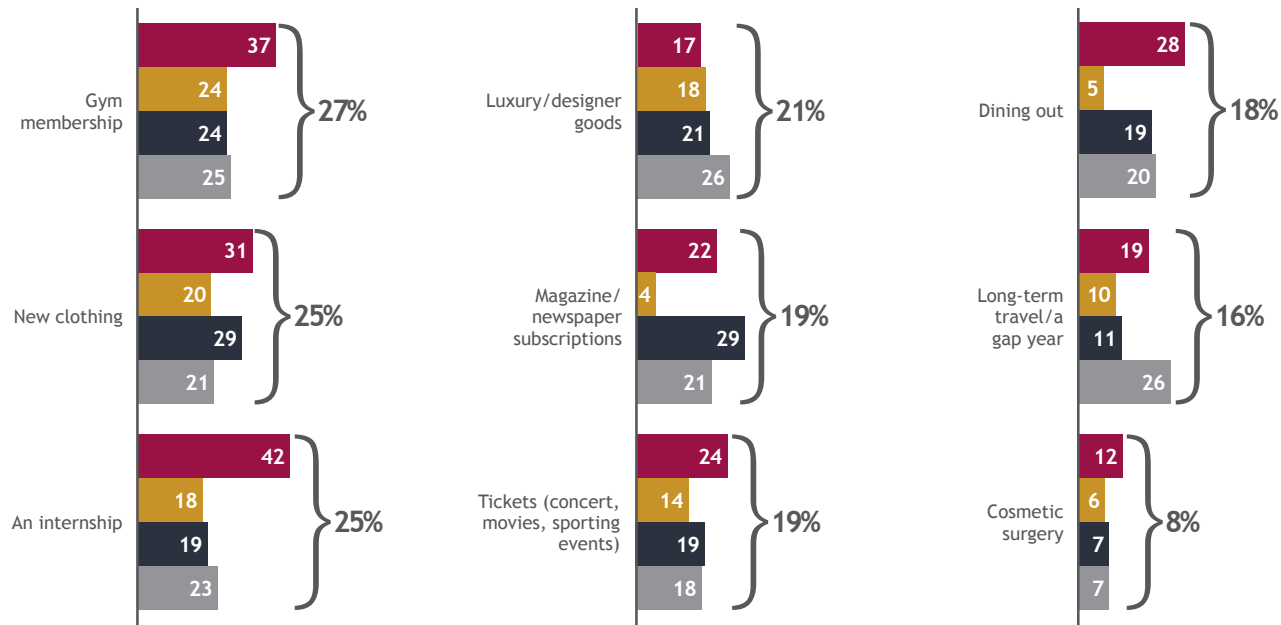


FIGURE 1C (cont'd.):

What constitutes a good investment?

Percentage of BRIC Millennials who believe each of the following would be a good investment

■ Brazil ■ Russia ■ India ■ China



INVESTING IN THE FUTURE (cont'd.)



As they settle into their lives, BRIC Millennials feel that spending on themselves in a range of ways will help provide security for the future. Brazilian Millennials consider the widest range of factors a smart investment, thanks to overall national optimism (and a culture that leans toward optimism), still-rising economic prospects and an emerging middle class with disposable income.

Across the BRIC markets, Millennials see home ownership and factors related to career advancement—education, starting a business and learning a language—as the most worthwhile investments. Russians are most beholden to the idea of entrepreneurialism, with 77% agreeing that starting a business is a good investment compared with 61% overall.

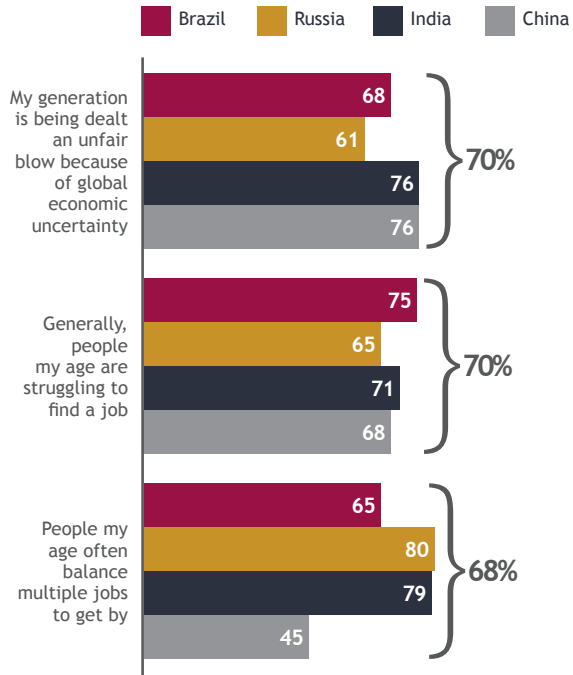
This digitally savvy generation also tends to see Internet access as a good investment (49%), especially the hyper-connected Brazilians (62%). By contrast, only about 1 in 5 BRIC Millennials views newspaper or magazine subscriptions as a good investment. Indians are most likely to see tech devices—tablets or laptops and mobile phones—as smart investments.

Luxury and designer goods, which fall relatively low on the list of worthwhile investments, are most valued by Chinese Millennials and least valued by Brazilians. Chinese respondents were also most likely to see the investment value in long-term travel or a gap year.

'IT'S NOT FAIR'



FIGURE 1D:
Uncertain employment
Percentage of BRIC Millennials who agree



Despite long-term economic expansion in their markets, BRIC Millennials, like many of their counterparts around the world, feel negatively affected by the global downturn. Seven in 10 agree that their generation is being dealt an unfair blow because of global economic uncertainty and that people their age are struggling to find jobs.

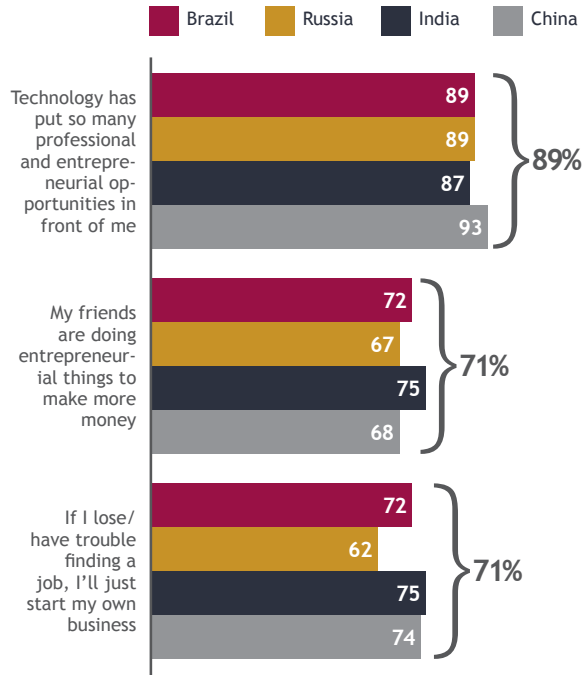
These Millennials are confronting fiercely competitive conditions. In China, for instance, the number of college graduates has quadrupled over the last decade, but professional jobs haven't grown nearly as fast. A 2012 government study cited in *Businessweek* found that unemployment among 21- to 25-year-old graduates was 16%, four times the official urban unemployment rate. Some Chinese women are going to extremes to find jobs, turning to plastic surgery to achieve a more European or younger look.

Patchwork earnings are most prevalent among Indian and Russian Millennials, with 8 in 10 saying that people their age balance multiple jobs to get by.

'I'LL PAVE MY OWN WAY'



FIGURE 1E:
Generation Go
Percentage of BRIC Millennials who agree



While Millennials around the world feel they've been dealt an unfair hand, many are finding opportunity in economic adversity, ushering in an unprecedented entrepreneurial mindset. Entrepreneurialism offers this generation a berth at the starting line and a sense of direct control over their future.

Among BRIC Millennials, 7 in 10 say they would start their own business if they lose or have trouble finding a job and see their peer group doing entrepreneurial things to boost their earnings.

Technology—which obliterates traditional barriers to entry—is a steppingstone for this uniquely resourceful generation. Nine in 10 agree that technology has put an array of professional and entrepreneurial opportunities before them.

'I'LL PAVE MY OWN WAY' (cont'd.)



Millennial entrepreneurs between 18 and 29 outnumber those aged 35-plus in Brazil and Russia. A few notable examples of young people in these markets who are rewriting the rules of the game:



GABRIEL BENARROS, 24

Founder of Ingresso, a social platform for selling tickets online that helps users discover events and serves as not only a channel for ticket sales but a publicity platform for the event organizer. Ingresso was invited to join Dave McClure's incubator 500 Startups.



TALLIS GOMES, 26

Founder of Easy Taxi, a mobile app similar to Uber that connects taxi drivers with nearby users in need of a ride. The company operates in 10 Brazilian and nine foreign cities, and has ambitious plans for expansion.



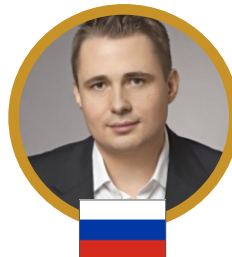
EDUARDO L'HOTELLIER, 28

Founder of GetNinjas, an online platform that connects service providers with customers. The company received \$3 million in Series A financing earlier this year.



PAVEL DUROV, 28

A colorful and sometimes controversial character, Durov founded VK, a social networking site that claims 100 million active users and has a goal of capturing 70% of Russia's social media market. According to some reports, however, the site is regarded as a major hub of pirated music and video, as well as porn.



OSKAR HARTMANN, 30

Founder and CEO of KupiVIP, a flash sale discount club. The company raised around \$100 million in venture financing in the past two years and will be seeking \$125 million in a 2014 IPO.



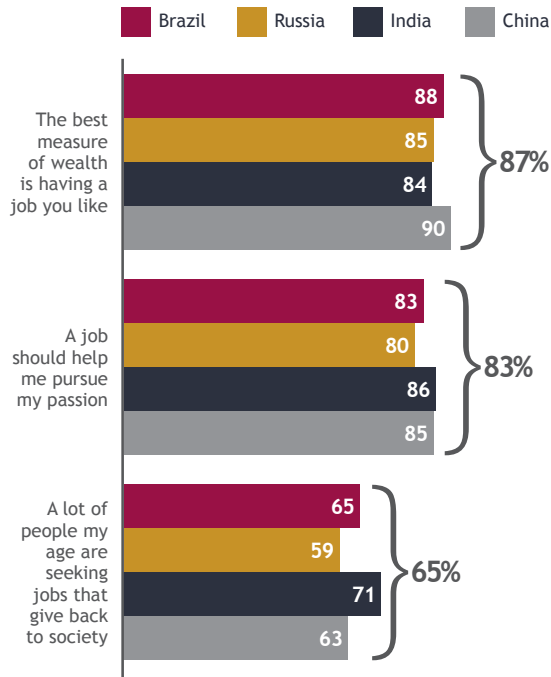
ELENA MASOLOVA, 29

Founder of Darberry, an online coupon company acquired by Groupon; CEO of Pixonic, a social network game publisher; and investment director at AddVenture, an angel fund.

WORKING FOR MORE THAN A PAYCHECK



FIGURE 1F:
Doing meaningful work
Percentage of BRIC Millennials who agree



Hand in hand with their entrepreneurial mindset, Millennials view a job as more than a paycheck. Instead, it should be satisfying and, as 83% of our sample believe, a vehicle for pursuing passions. Close to 9 in 10 respondents say having a job one likes is the best measure of wealth.

Self-fulfillment isn't the only goal: Many in this generation are looking to make a positive social impact, with nearly two-thirds saying that a lot of their peers are looking for jobs that give back to society. In India, for example, some graduates from top universities are forgoing traditional positions in investment, banking or consulting in favor of social entrepreneurship efforts. And a PwC study found that three-quarters of Brazilian and Russian Millennials actively seek out employers whose corporate responsibility efforts reflect their personal values. This was followed by 69% of Indians and 58% of young Chinese employees.

TECH EMPOWERS



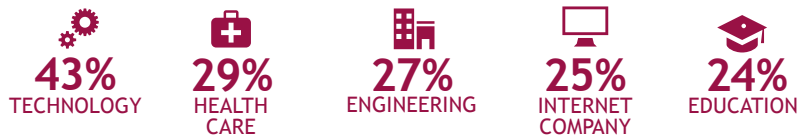
When it comes to social mobility, jobs centered around technology are seen as offering a path forward, as do jobs in media and entertainment. The more traditional jobs—in health care, engineering, consulting and law—fall much lower on the scale, perhaps because of the cool factor associated with the tech, media and entertainment industries and the highly competitive nature of the other well-paid professions.

WHICH CAREERS OFFER THE MOST SOCIAL MOBILITY?

(Top 5 responses by country)



BRAZIL



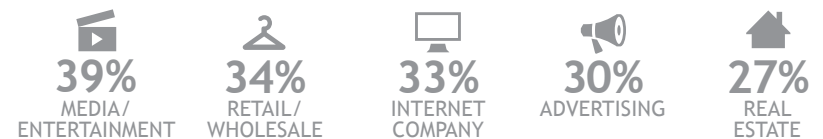
INDIA



RUSSIA



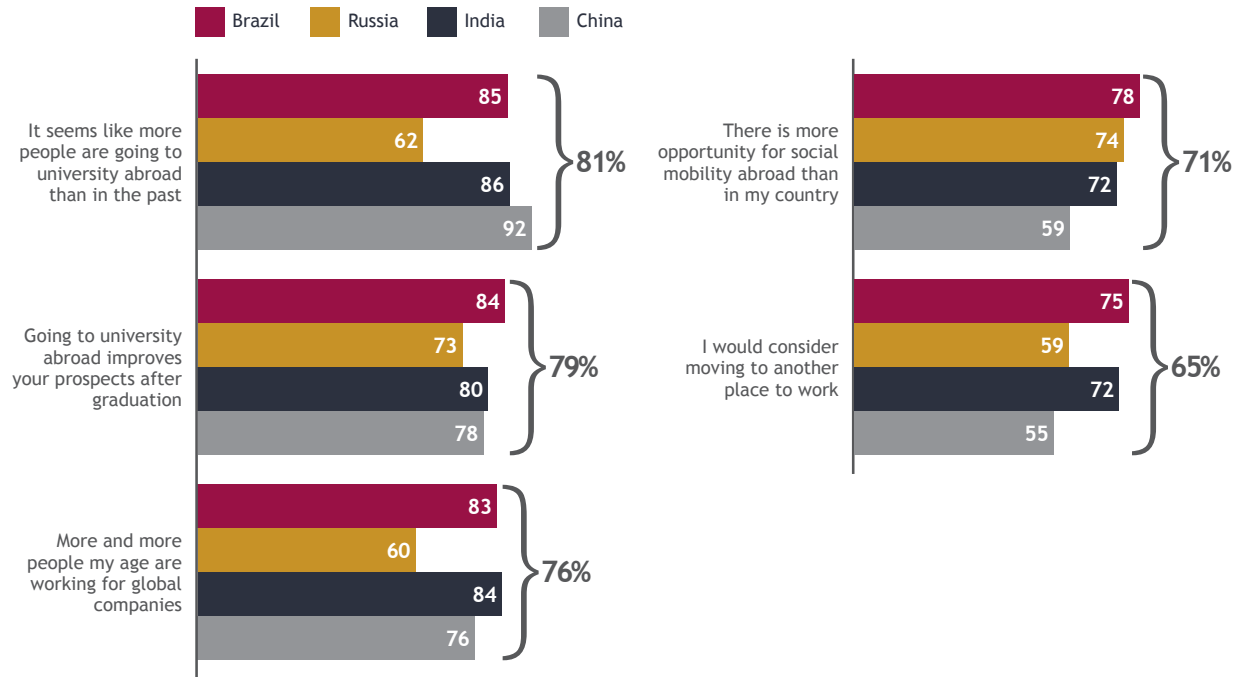
CHINA



THE GRASS IS ALWAYS GREENER



FIGURE 1G:
Greener pastures overseas
Percentage of BRIC Millennials who agree

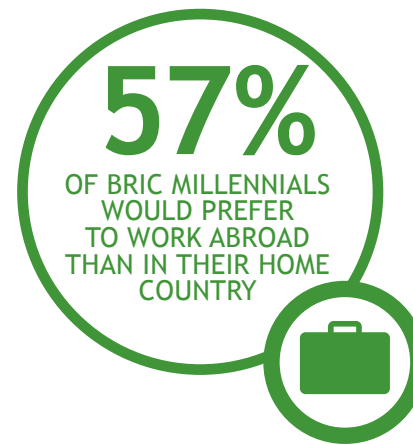
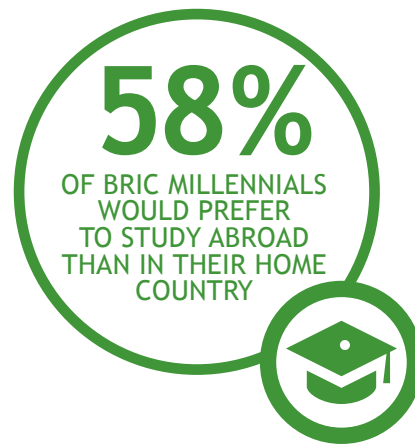


THE GRASS IS ALWAYS GREENER (cont'd.)



For Brazilian, Indian and Chinese Millennials, an international education carries perceived professional benefits, and more of them are pursuing degrees abroad. Young Russians are the least likely to agree that going to university abroad improves one's job prospects and that their peers are working for global companies. Studying abroad, generally considered a prerogative of elites, is not widespread among Russians, who strive instead for admission into universities in Moscow or St. Petersburg.

This generation is also ready to venture away from home to follow opportunity—almost two-thirds said they would consider moving elsewhere to find work. For many, these moves are motivated by the notion that social mobility is more easily accomplished abroad. Brazilians are the most open to moving away and the most likely to regard foreign soil as more conducive to upward mobility.



THE GRASS IS ALWAYS GREENER (cont'd.)



CASE STUDY: TENCENT QQ, “YOUR COMPANION OF 12 YEARS”



A spot from leading Chinese social network Tencent QQ demonstrates how its offerings keep distant family members in close contact. A boy displays typical annoyance toward his loving mother—irritation when she repeatedly asks for help with the television remote and when she greets him at the door. After he leaves home for school in America to fulfill his dreams, his mother learns how to use QQ so they can stay in touch. Once the two of them are on opposite sides of the earth, he matures and finally starts to understand his mother; their hearts grow closer. The young man goes on to get a job in America but acknowledges that no matter how far away his mother is, she’s always in reach with the click of a button.

GOVERNMENT, ACTIVISM AND NATIONAL PRIDE



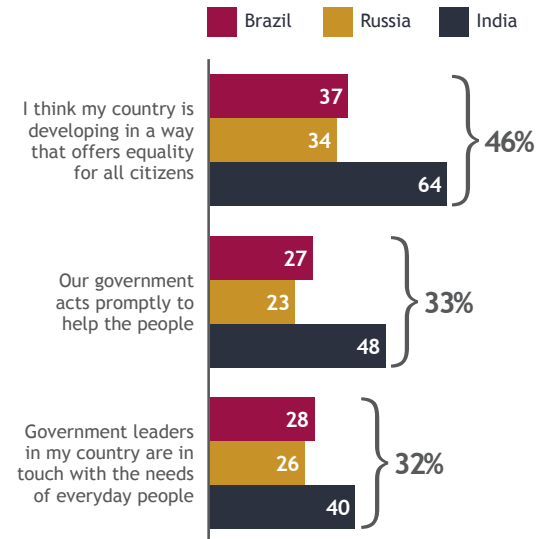
WARY OF GOVERNMENT



FIGURE 2A:

Government effectiveness

Percentage of Brazilian, Russian and Indian Millennials who agree*



WARY OF GOVERNMENT (cont'd.)



Indian Millennials are relatively positive about their government and political leaders. Nearly half believe the government acts promptly to help people, and 4 in 10 see the government as being in touch with the needs of citizens. As many as 64% believe India is developing in a way that offers equality for all. Still, with the general public frustrated by India's stalled development and government corruption, this does not translate to widespread optimism and satisfaction with the status quo.

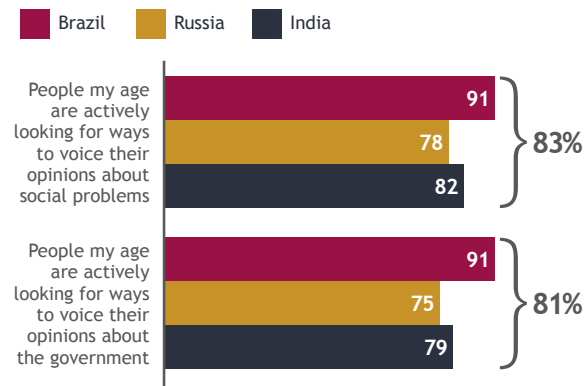
Millennials in Brazil and Russia, however, are much more dissatisfied with their leaders. Fewer than 3 in 10 believe their government acts promptly to help people and that their leaders are in touch with the people's needs. Not too many more feel positively about the direction of national development—just over a third see their nation as developing in a way that offers equality for all citizens.



MAKING THEIR VOICES HEARD



FIGURE 2B:
Activism and social change
Percentage of Brazilian, Russian and
Indian Millennials who agree*



Accustomed to broadcasting their opinions on social media, this generation feels strongly about making their voices heard when it comes to social and political issues.

Digital connectivity has driven awareness and engagement. Chinese Millennials use blogs, as well as social networks such as the microblogging platform Weibo, to express views on social matters. In India, citizens can post questions to politicians via the website Oursay; these are then voted on and posed to relevant leaders. Oursay has hosted two forums with government leaders this year, and other Indian leaders have expressed interest in participating.

Brazilian Millennials over-index here, perhaps due to the survey coinciding with nationwide demonstrations focused on public spending and government corruption. Young Brazilians didn't take to the streets as a rejection of politics, wrote former president Luiz da Silva in a *New York Times* op-ed, but rather thanks to the "drive to increase the reach of democracy, to encourage people to take part more fully."

MAKING THEIR VOICES HEARD (cont'd.)



SPOTLIGHT ON RUSSIA

Russian Millennials are somewhat less likely to say they're actively seeking ways to effect change. While unhappy with the government, this cohort is generally socially and politically passive, feeling helpless to change the nation's political situation.

One exception is the “creative class”—white-collar professionals in creative jobs—who have helped drive opposition to the Putin regime. They were among the main forces behind demonstrations on Moscow's Bolotnaya Square earlier this year. The protests had little effect, however, and the government was careful to not let the situation get out of control both in the streets and in the digital sphere.



MAKING THEIR VOICES HEARD (cont'd.)



CASE STUDY: THE TIMES OF INDIA, “I LEAD INDIA”

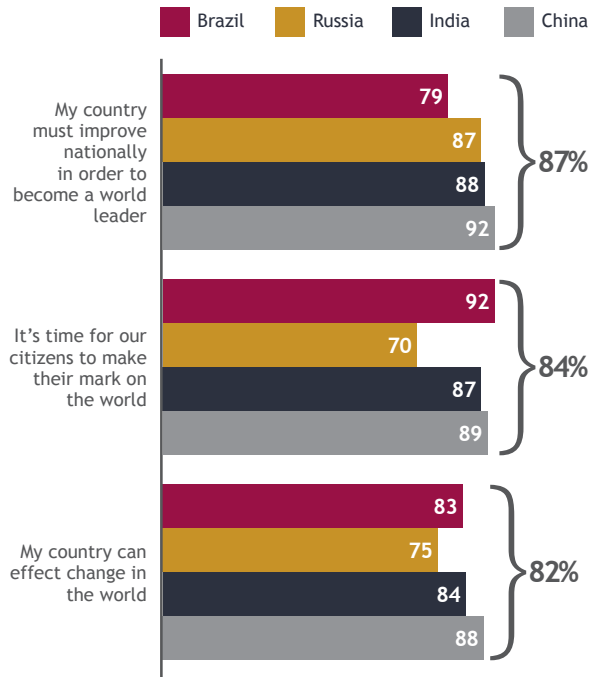


The Times of India dramatized the spirit of Millennials in its recent “I Lead India” initiative. An advertisement shows young people from all over India standing up from their chairs and charging forward with a determination to take on the nation’s biggest challenges. The passion of the generation culminates in a massive bonfire that torches all the comfortable seats—the idea is not to take things sitting down. The Times of India challenges youth to be the change they want to see, sending the message that “You are your own leader.”

BRICS ON THE WORLD STAGE



FIGURE 2C:
BRICs step out
Percentage of BRIC Millennials who agree



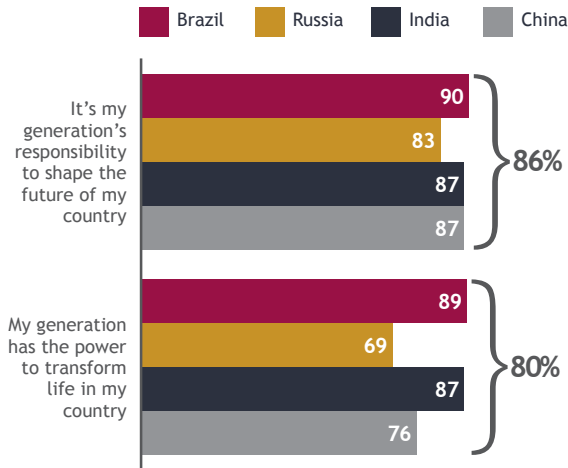
As the BRICs raise their profiles on the world stage, Millennials in these markets acknowledge that there's work to be done at home before their country can become a world leader—a compelling prospect, with more than 8 in 10 saying it's time to make a mark on the world. A similar proportion believe their country can effect global change.

Russian Millennials stand out for their below-average enthusiasm over their people and nation making a global impact. Much of this can be attributed to the nation's current position in comparison with its Soviet past. Although too young to remember firsthand, Millennials can see the pride, patriotism and nationalism their nation once had from Soviet-era films and hear about it from older generations. All cultural icons of national pride are linked with the past—scientific advancement, the space program, military forces and so on—while the prevailing attitude is that there's not much to be proud of in present-day Russia. Case in point: the 2014 Winter Olympics in Sochi, which have devolved from a symbol of the rebirth of national pride to yet another example of corruption and scandal.

BRIC NATIONAL PRIDE



FIGURE 2D:
National pride
Percentage of BRIC Millennials who agree



This generation of young people feels invested in shaping their nations' futures—and believe they have the power to shake things up. This is especially true for Brazilians. Russians, by contrast, feel somewhat less empowered to transform life in their homeland, largely because of the state's heavy-handed influence and a dearth of ways to influence social and political life in the country.

TRADITION VS. MODERNIZATION



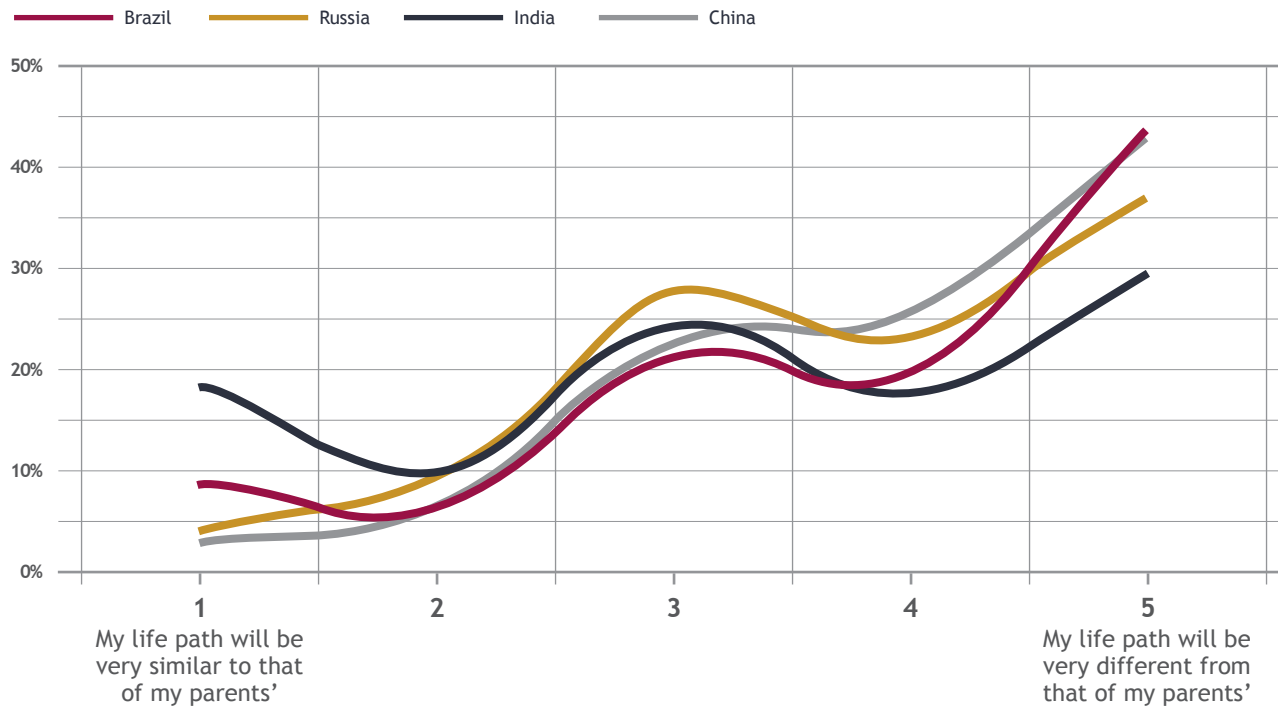
'I'LL NEVER BE LIKE MY PARENTS'



FIGURE 3A:

Forging a new life path

How BRIC Millennials rank the direction of their life path in comparison to their parents



‘I’LL NEVER BE LIKE MY PARENTS’ (cont’d.)



While many young people imagine forging a different path than their parents followed, BRIC Millennials are seeing many long-standing cultural norms get upended as their markets develop. Some even have difficulty seeing their parents as role models. So it's not surprising that they tend to envision their own lives being quite different from that of their parents.

Millennials in China and Brazil are feeling the cultural shift most acutely. Thanks largely to economic reforms that got under way when the oldest Millennials were born, this generation has grown up in a very different China. In Brazil, rapid economic growth, lower inflation and an optimistic outlook play a big role in the professional and personal life choices that young people may consider.

Indian Millennials, on the other hand, are least likely to expect that their lives will be drastically different from those of the previous generation. While young Indians are embracing the prosperity ushered in by globalization, they tend to fit the changes that growth has brought into existing social structures and norms.

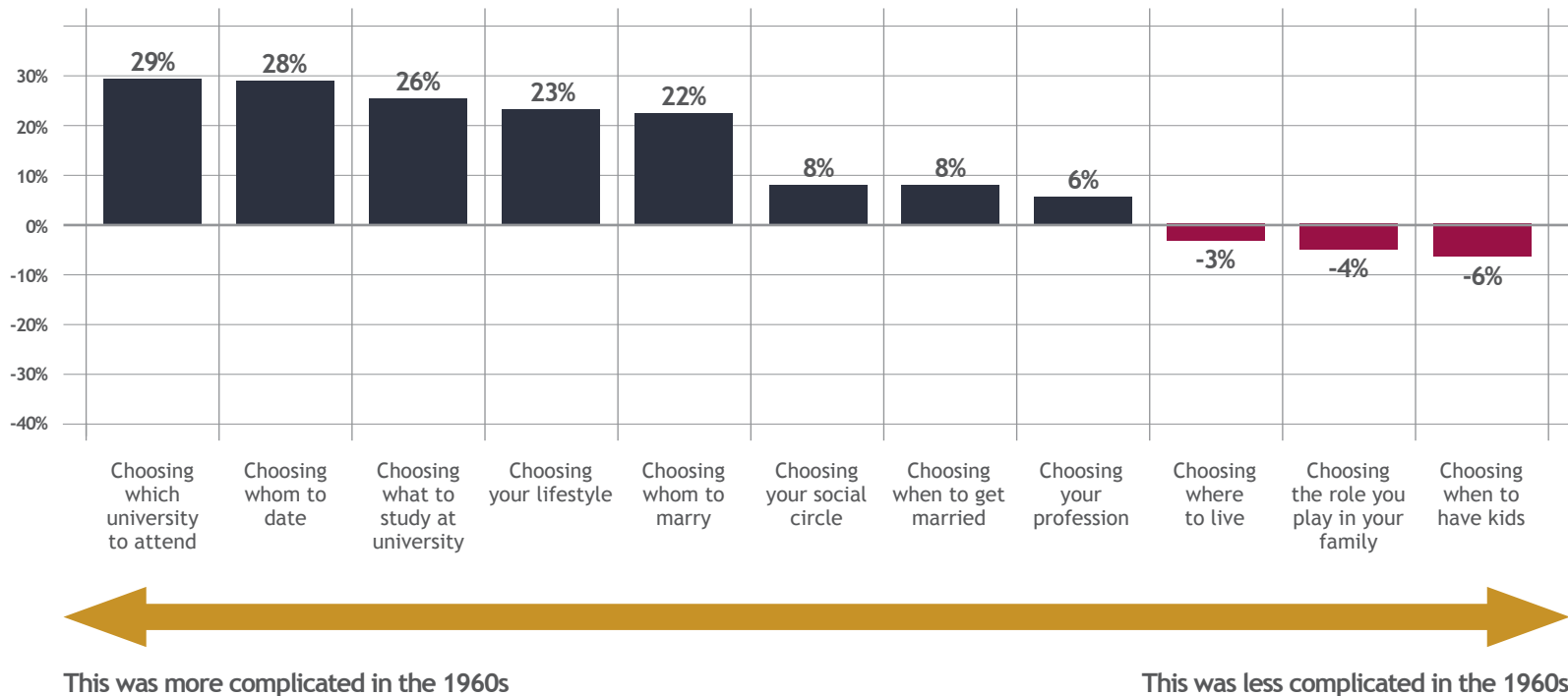
NO NOSTALGIA FOR BRAZILIANS



FIGURE 3B:

Life seems less complicated today

Percentage of Brazilian Millennials who say each factor is less complicated today than it was 50 years ago minus the percentage who say it is more complicated



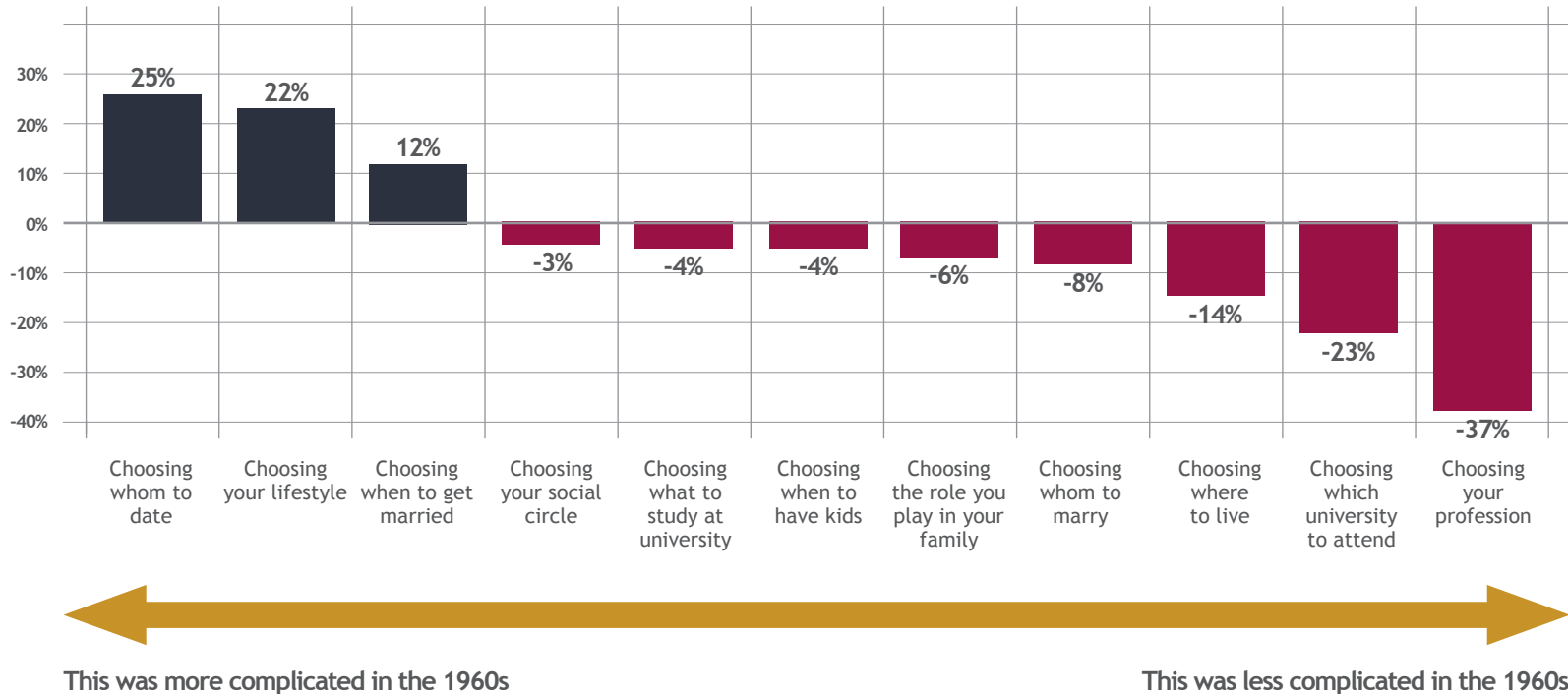
NOSTALGIA FOR A LESS COMPLICATED LIFE



FIGURE 3C:

Life seems more complex today

Percentage of Russian Millennials who say each factor is less complicated today than it was 50 years ago minus the percentage who say it is more complicated



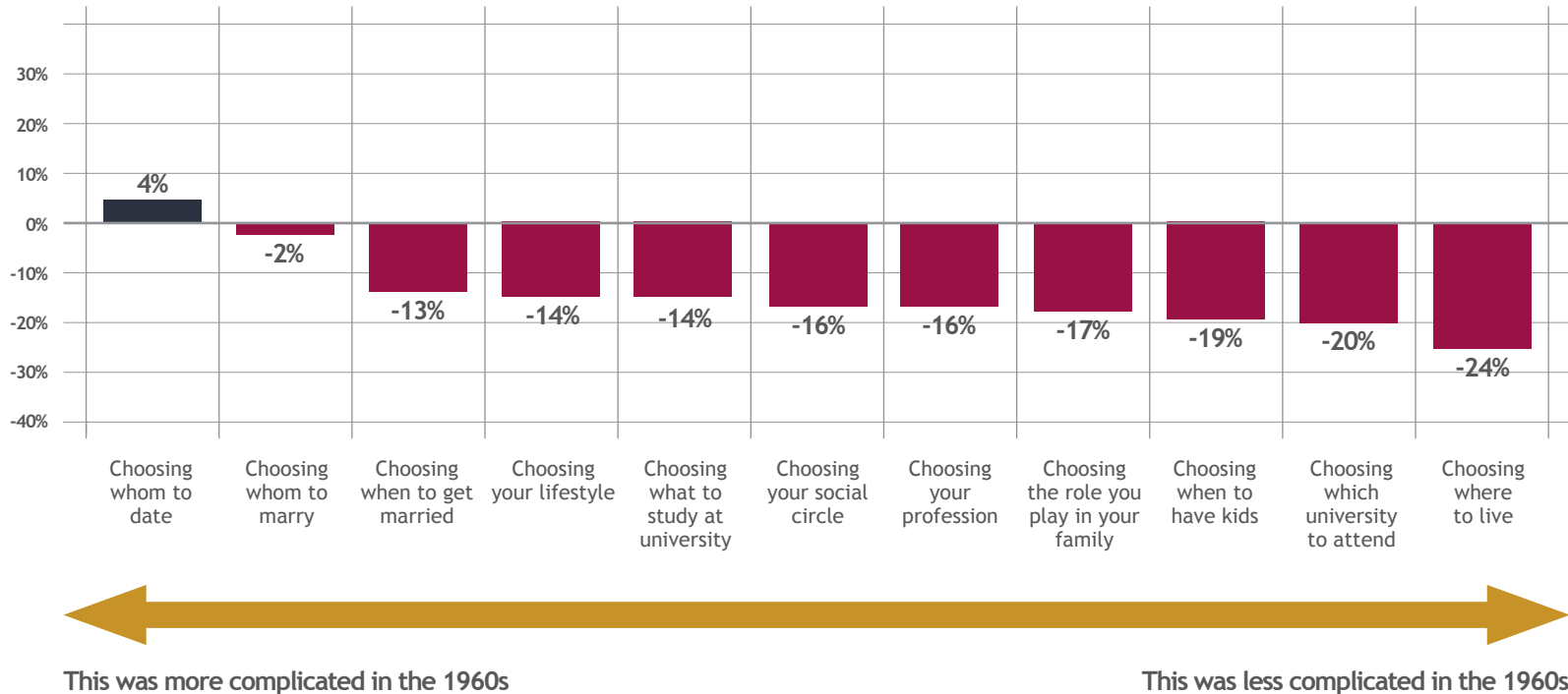
NOSTALGIA FOR A LESS COMPLICATED LIFE (cont'd.)



FIGURE 3D:

Life seems more complex today

Percentage of Indian Millennials who say each factor is less complicated today than it was 50 years ago minus the percentage who say it is more complicated



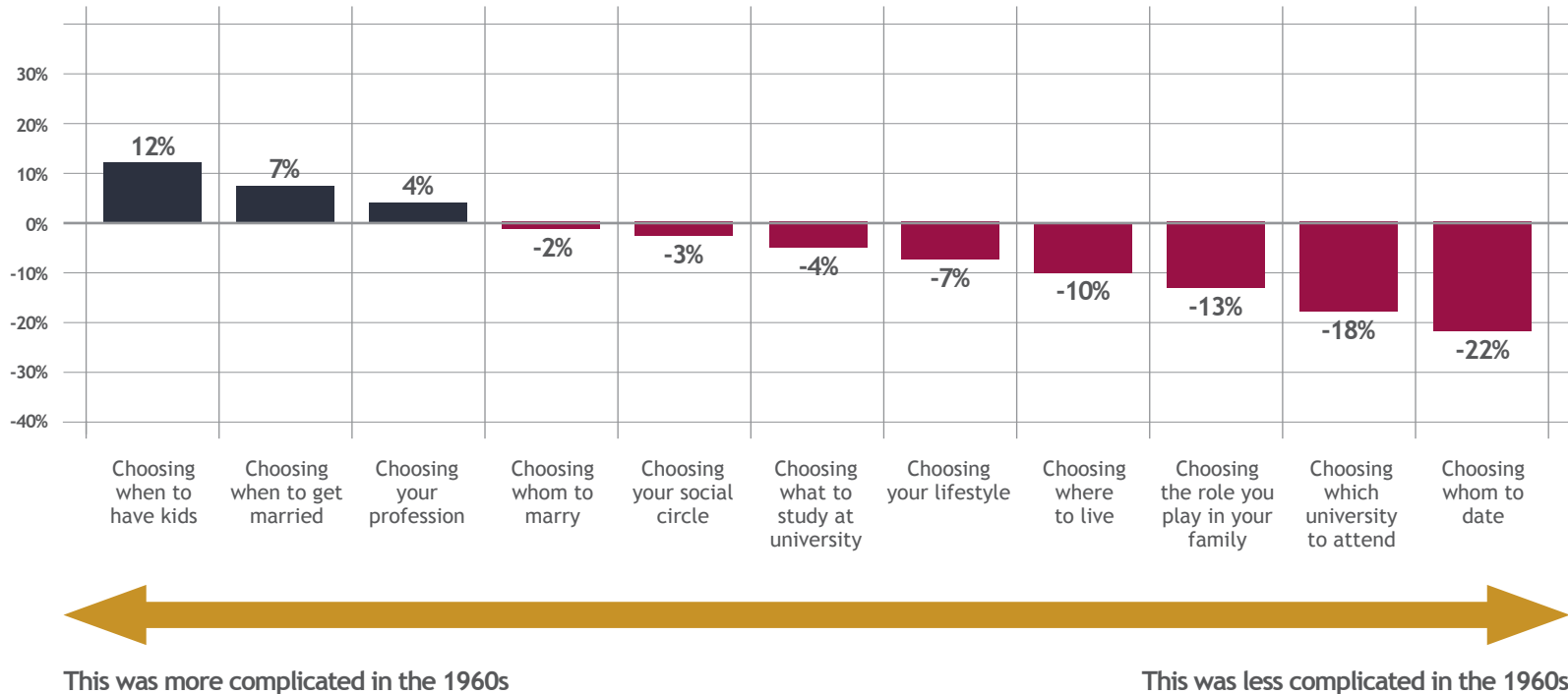
NOSTALGIA FOR A LESS COMPLICATED LIFE (cont'd.)



FIGURE 3E:

Life seems more complex today

Percentage of Chinese Millennials who say each factor is less complicated today than it was 50 years ago minus the percentage who say it is more complicated



NOSTALGIA FOR A LESS COMPLICATED LIFE (cont'd.)



Navigating emerging social and cultural norms and a new array of life choices is confusing and stressful for Millennials in Russia, India and China. While this generation is reaping the benefit of new opportunities and rising acceptance of nontraditional lifestyles, the downside is greater pressure to succeed and a fear of making the wrong choices. They see many life choices (choosing what to study and where, choosing where to live, etc.) as being more complicated today than they were in the 1960s.

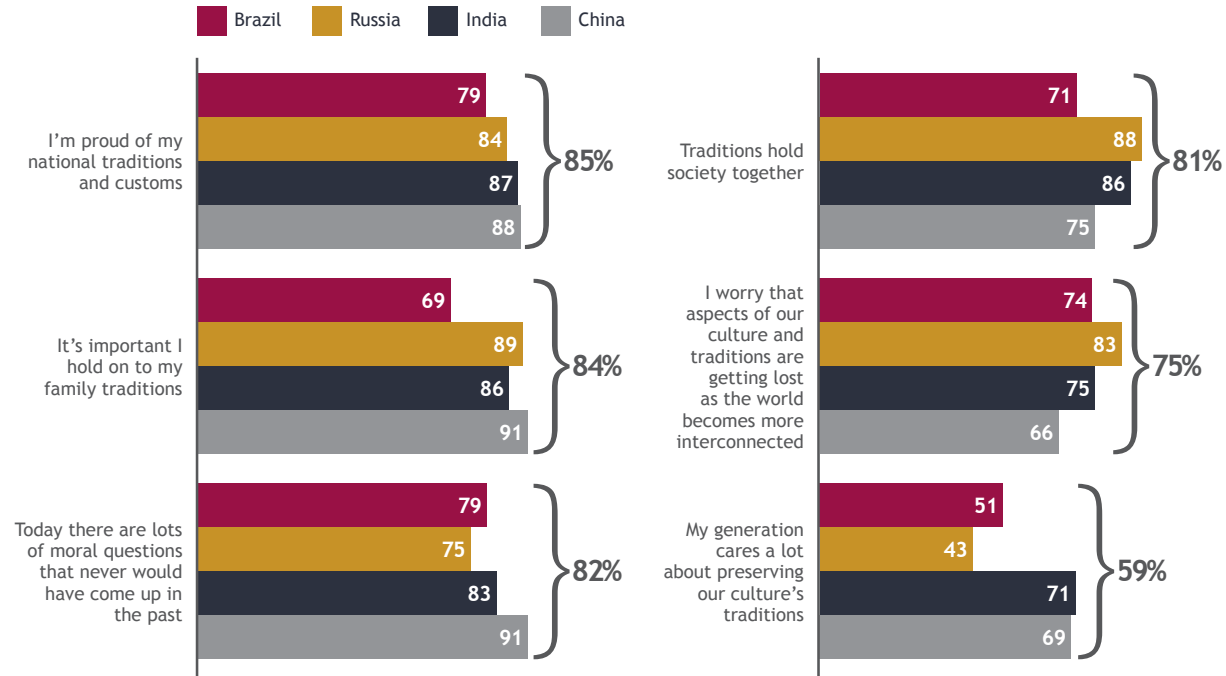
Notably, decisions around dating and marriage are seen as easier today, but some aspects remain complex for Millennials: choosing whom to date, in China; whom to marry, in Russia; and when to marry, in India.

The overall exception here is Brazil, where Millennials believe that many major life choices are easier to make today than they were 50-some years ago. The only ones that seem harder today are choosing where to live, what role to play in your family and when to have kids.

TRADITIONS ENDURE FOR MOST



FIGURE 3F:
Holding on to tradition
Percentage of BRIC Millennials who agree



TRADITIONS ENDURE FOR MOST (cont'd.)



Even while modern life has changed so substantially in just a few decades—or perhaps because it's shifted so quickly—Millennials are strongly invested in preserving their national customs, as well as their family's traditions.

In China, family has always had a primary place in society, and this still rings true: 9 in 10 Chinese Millennials feel that holding on to family traditions is important. Russian and Indian Millennials are most apt to believe that traditions hold society together. Fewer than half of Russians, however, say their generation cares a lot about preserving traditions, and they are most apt to worry that traditions are getting lost in a globalized world. Russians understand that it's impossible to reap all the benefits of modernization without sacrificing some traditions—as a result, they're questioning how to keep the traditional way of life alive.

Across the board, Brazilian Millennials rate below average in their enthusiasm for tradition. Many in Brazil define tradition via their nuclear families. And in this very heterogeneous nation, culture is constantly evolving thanks to an openness to blending new elements into existing customs and traditions.

TRADITIONS ENDURE FOR MOST (cont'd.)



CASE STUDY: METERSBONWE, NATIONAL PRODUCT



A mixed-media spot from Chinese apparel retailer Metersbonwe encourages youth to embrace both the nation's traditional products and goods representative of the modern era. The commercial takes viewers for a ride in China's iconic Red Flag limo along a timeline of famous products that have come out of China over the past century, reminding young consumers that the nation continues to create new emblematic products. The spot goes on to show some traditional Chinese figures remixed with modern culture on T-shirts, in video games and so on. China's youth are encouraged to "Walk a different path" and "Copy the glory of the nation."

TRADITIONS WORTH SAVING

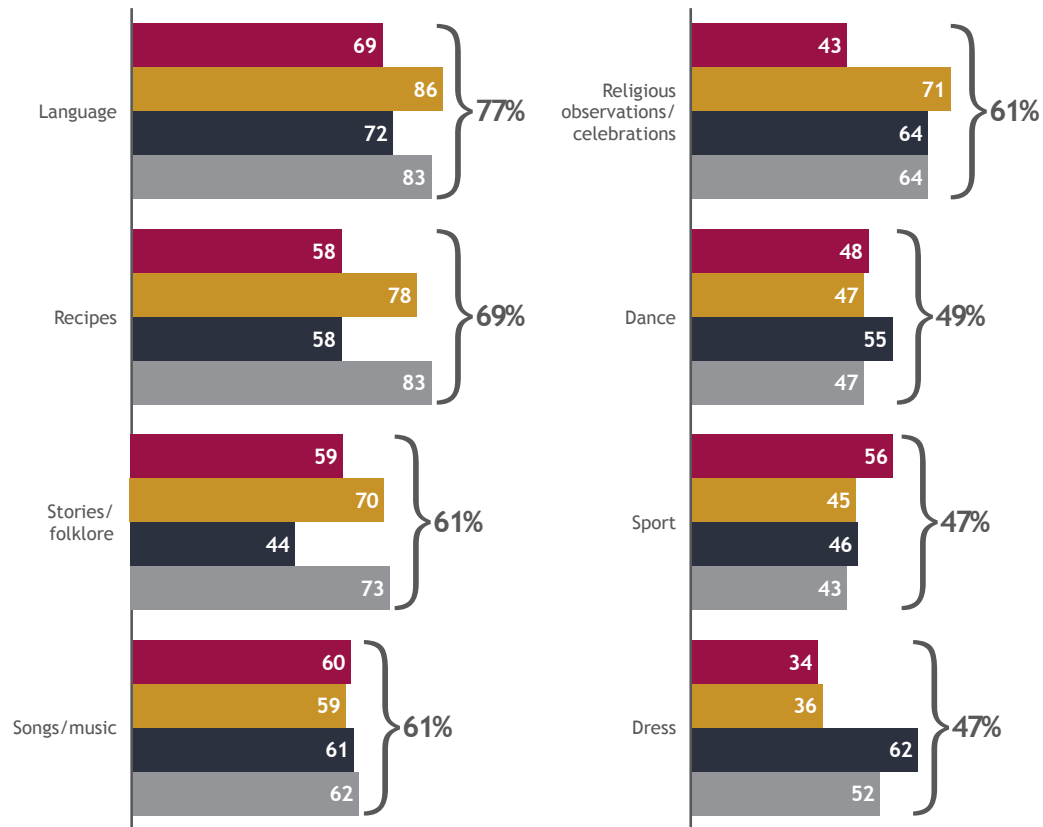


FIGURE 3G:

I'll never let go...

Percentage of BRIC Millennials who would want to keep each of the following aspects of tradition despite globalization

■ Brazil ■ Russia ■ India ■ China



TRADITIONS WORTH SAVING (cont'd.)



When it comes to specific aspects of culture and tradition that Millennials are concerned about preserving in the face of globalization, the basics of language and food are closest to the heart, especially among Chinese and Russian respondents.

Indians stand out for their interest in preserving traditional dress. Russians vow to remain faithful to their religious observations and celebrations. And not surprisingly, Brazilians stand out for dedication to their national sport, with our planners making the argument that football is one of the few touchstones that unify all Brazilians. Indeed, among Brazilians and Indians, regional traditions are generally more important than national ones.

TRADITIONS WORTH SAVING (cont'd.)



CASE STUDY: MOHAN MUSIC PALACE, HARMONIUM LOVE BANNER



In India, there's a drive to maintain traditional values and customs as the nation becomes more globalized and adopts new practices—for instance, some youth have been learning to play Western instruments like the keyboard and guitar. Mohan Music Palace, a 70-year-old shop in New Delhi, sought to bring the joy of the traditional Indian harmonium into a modern context. A Web banner application turned any laptop into a harmonium via keyboard strokes and moving the screen. The initiative managed to use modern technology to reinforce the importance of maintaining tradition.

BECAUSE SOCIETY SAYS NO



FIGURE 3H:

Cultural taboos

Percentage of BRIC Millennials who believe society considers each of the following very or somewhat taboo

■ Brazil ■ Russia ■ India ■ China

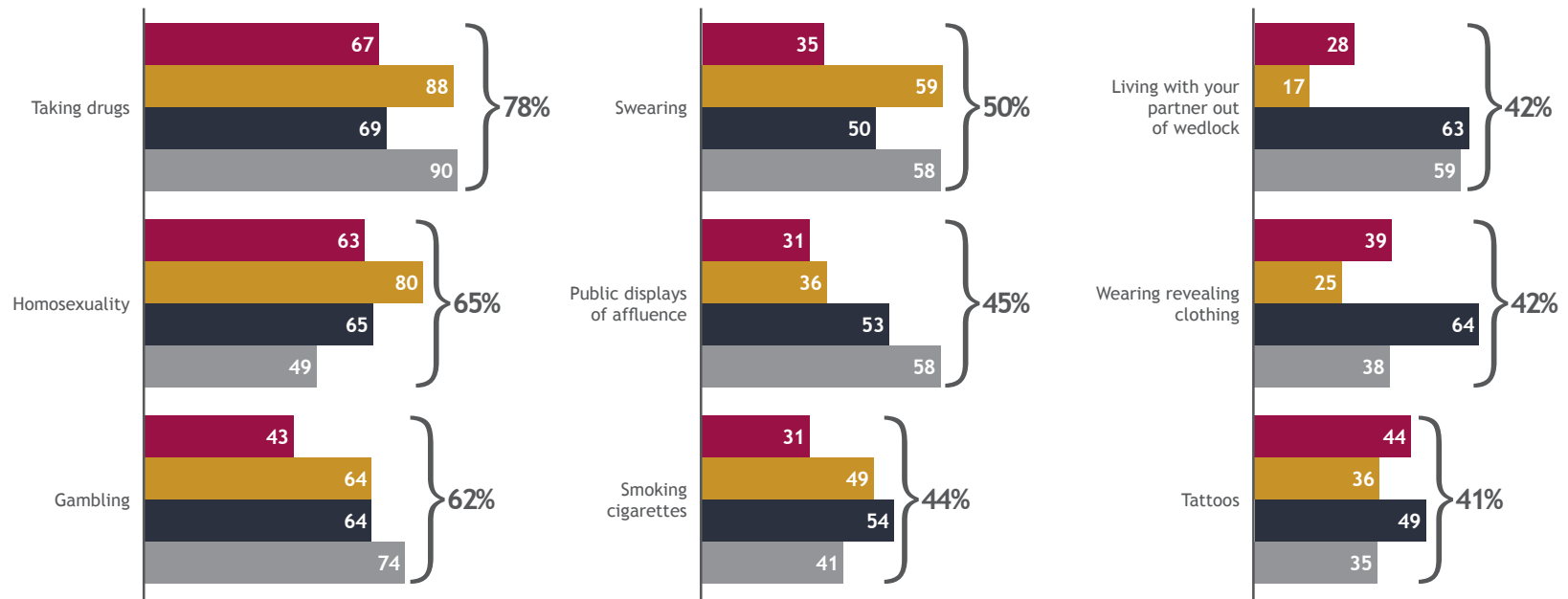


CHART CONTINUES ➔

BECAUSE SOCIETY SAYS NO (cont'd.)

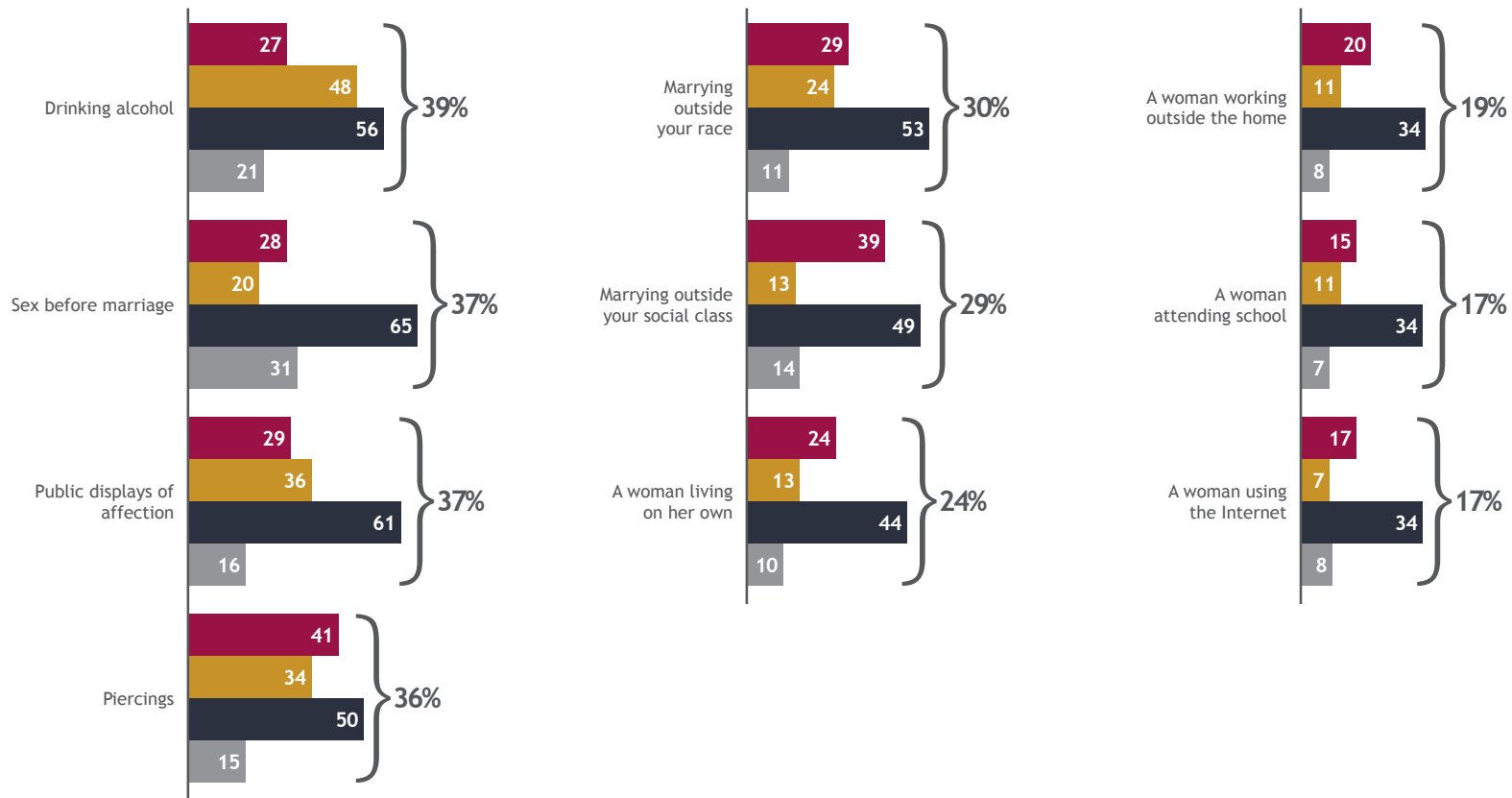


FIGURE 3H (cont'd.):

Cultural taboos

Percentage of BRIC Millennials who believe society considers each of the following very or somewhat taboo

■ Brazil ■ Russia ■ India ■ China



BECAUSE SOCIETY SAYS NO (cont'd.)



As cultures become more globalized, many longstanding social taboos are starting to weaken, but in some markets they persevere among a majority of people.

Indians have many taboos around dating and sex, with clear majorities saying society considers it taboo to live with a partner out of wedlock, to engage in premarital sex and even to publicly display affection, all well above the BRIC average. Modesty also remains important, more so than in the other countries surveyed, with 64% of Indian Millennials saying it is taboo to wear revealing clothing. Given the importance of family among this cohort, it's those taboos that don't impact parents or the family structure that are most likely to fade away.

In China and Russia, taking drugs is very much taboo.

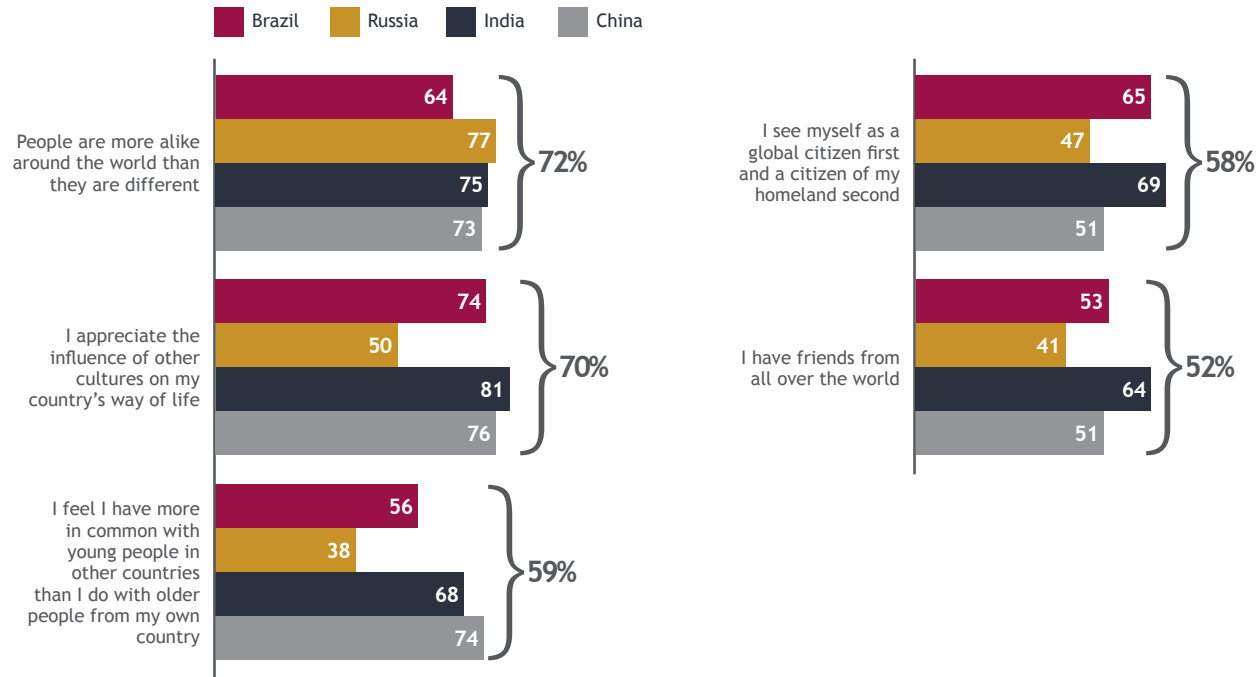
Homosexuality is still quite taboo in Russia, as recent demonstrations and global headlines have spotlighted. Although homosexuality was decriminalized in 1993, the government's current campaign for "traditional family values" has spurred legislation that bans "propaganda" on nontraditional sexual relationships. This is "widely understood as an effort to suppress homosexuality and Russia's fledgling gay rights movement," as *The New York Times* reports. While urban centers are more tolerant and generally feature a visible LGBT nightlife scene, "Russia remains a country where discrimination and even violence against gay people are widely tolerated." By contrast, the taboo has weakened considerably in China.

Across the board, Brazilians seem to have few strict taboos.

LIVING IN AN INTERCONNECTED WORLD



FIGURE 31:
Benefits of globalization
Percentage of BRIC Millennials who agree



LIVING IN AN INTERCONNECTED WORLD (cont'd.)



Having grown up in an interconnected world, BRIC Millennials feel connected to cultures around the globe. More than 7 in 10 agree that “People around the world are more alike than different,” while 6 in 10 say they have more in common with young people in other countries than older people at home. This feeling of connection is more than theoretical: Half our respondents (and as many as 64% of Indian Millennials) say they have friends from all over the world.

As the BRICs play a larger role on the world stage, the influence of outside cultures becomes stronger at home—a trend that most Millennials embrace. Seven in 10 said they appreciate the influence of other cultures on their country’s way of life. Connecting with other cultures, however, doesn’t necessarily translate to a weakening of national identity. While around two-thirds of Indians and Brazilians say they see themselves as global citizens first and citizens of their homeland second, only about half of Chinese and Russian youth concur.

Lacking a well-established pattern of studying, traveling and working abroad, Russians are the least connected to outside cultures. They are less likely than the other Millennials surveyed to have friends around the world and much less apt to feel significant commonalities with young people beyond their borders. They’re also much less enthusiastic about the influence of other cultures on their way of life. There is much discussion in Russia today regarding global influences on local culture.

STRESS AND URBANIZATION



LIVING A STRESSFUL LIFE



FIGURE 4A:

Stress factors

Factors that contribute to stress among BRIC Millennials

■ Brazil ■ Russia ■ India ■ China

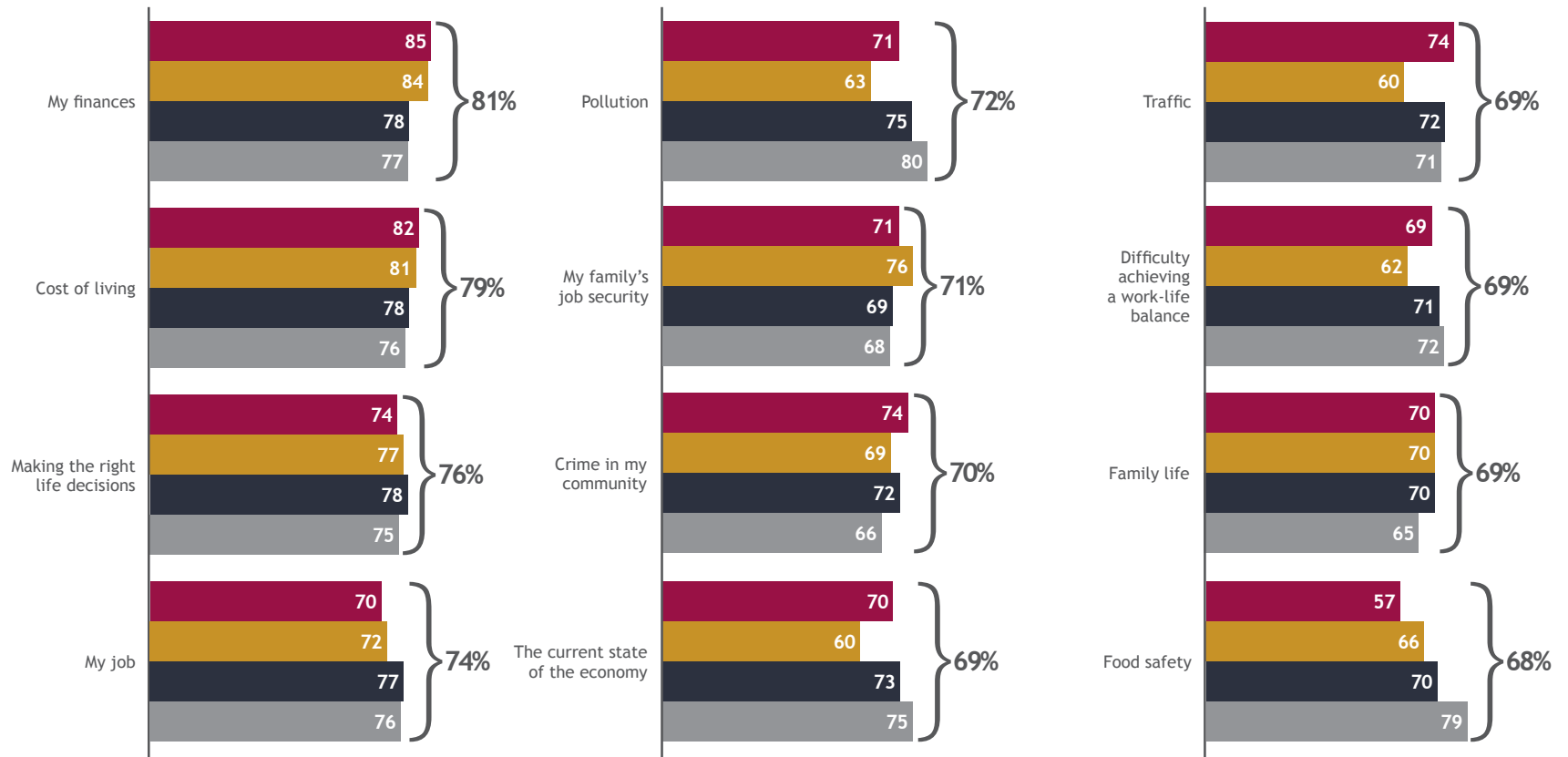


CHART CONTINUES →

LIVING A STRESSFUL LIFE (cont'd.)

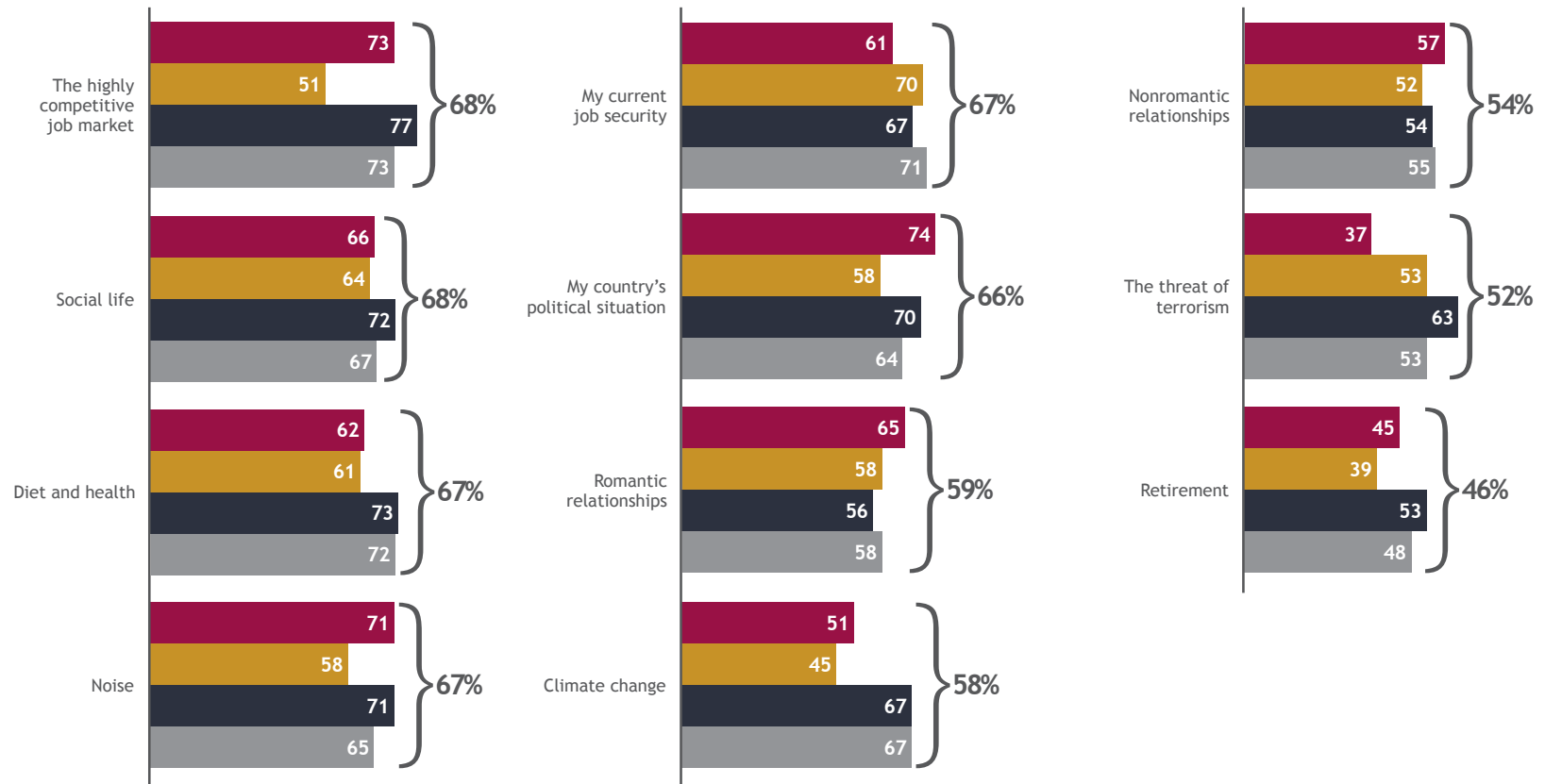


FIGURE 4A (cont'd.):

Stress factors

Factors that contribute to stress among BRIC Millennials

■ Brazil ■ Russia ■ India ■ China



LIVING A STRESSFUL LIFE (cont'd.)



Life is getting more stressful for Millennials, in line with one of our 10 Trends for 2013, the Super Stress Era: 53% say their stress level has increased over the past year. A wide range of factors is driving this stress, with economic concerns the most prominent. Indeed, even retirement—normally a worry that's not pressing among young adults—was cited as a stress factor by close to half of Millennials (46%). Eight in 10 said their finances and the cost of living contribute to stress in their lives, and 7 in 10 are stressed about their family's job security and the state of the economy.

The highly competitive job market worries Millennials in Brazil, India and China, with more than 7 in 10 citing it as a stress factor, compared with half of Russians. One driver in China is the increase in college graduates, which is outpacing the rise in professional jobs. While a degree is becoming a prerequisite for a wide range of jobs, it's no longer the differentiator it was just a few years ago. In India, many graduates are lacking the professional skills to be hired.

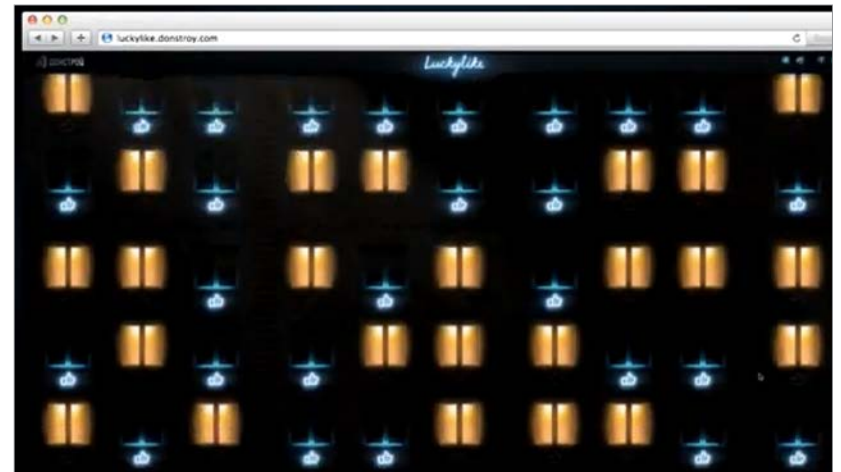
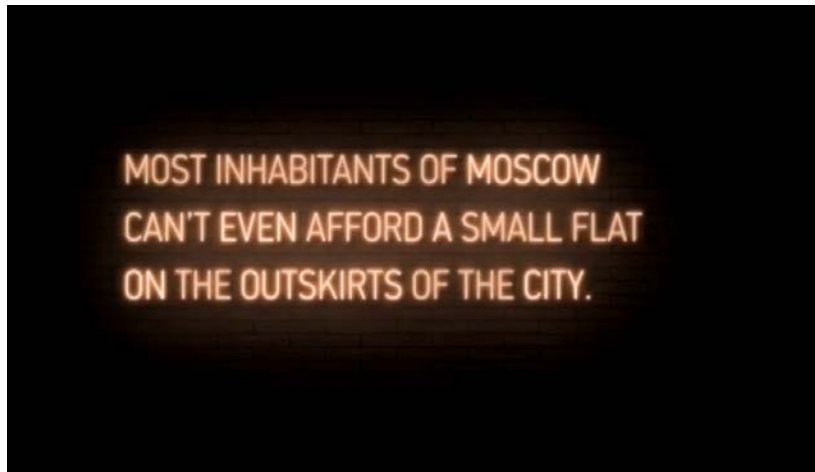
Chinese Millennials stand out when it comes to concerns about pollution (80% cite it as a stress factor) and food safety (79%). With near-daily reports of food scandals and frequent stories about worsening pollution, Chinese Millennials feel both alarmed and powerless to change the situation.

Chinese and Indian Millennials are notably concerned about climate change (67%). By contrast, Russians are more focused on factors that impact them personally on a day-to-day basis—job security, personal finances—while more abstract or long-term concerns, such as pollution, climate change and even political and economic issues, fall lower on the radar.

LIVING A STRESSFUL LIFE (cont'd.)



CASE STUDY: DONSTROY, “LUCKYLIKE”



With apartments in Moscow among the most expensive in the world, the cost of living is one of the biggest stressors for Russian Millennials. And not surprisingly, real estate companies are increasingly unpopular. Real estate developer Donstroy tapped into these frustrations by creating a contest to win a free apartment in Moscow. A website, Luckylike, showed windows of 1 million virtual apartments; the winning apartment was hidden behind one of them. Players could click on a window, then make a “lucky like” via Facebook to enter. Each “like” carried a unique message about Donstroy in the news feed, and inviting friends to play granted participants additional attempts. The campaign earned the company about a million social media mentions.

LIVING A STRESSFUL LIFE (cont'd.)



CASE STUDY: FORD, ECOSPORT

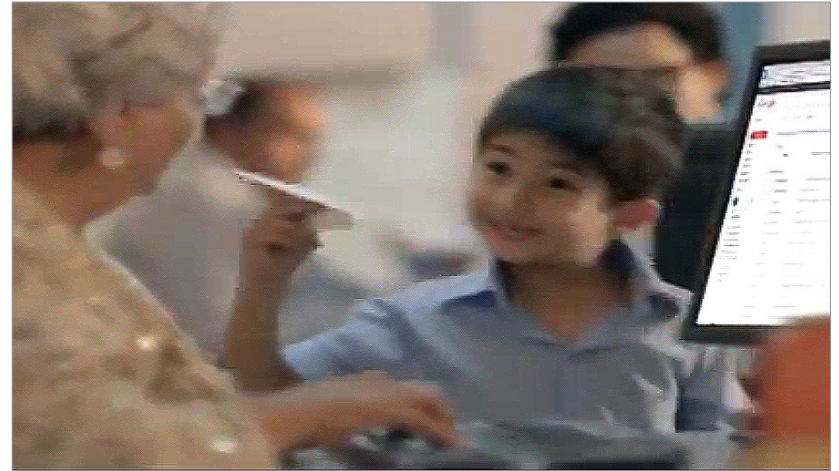


Ford's EcoSport adopted a straightforward approach to openly address Chinese Millennials' social and economic anxieties. In an online video, a young man talks honestly about his pressure from family and work, and his anxiety over being "short of money." He mocks the aspirational attitude of most youth brands, stating simply that his "dream" car is one that balances the expectations of his parents, girlfriend and boss, on a budget. Rather than promising a far-fetched dream, a common approach in China's car market, the campaign acknowledges the target consumer's imperfect reality and positions the small SUV as a pragmatic solution.

LIVING A STRESSFUL LIFE (cont'd.)



CASE STUDY: KUONI, “PAPER PLANE”

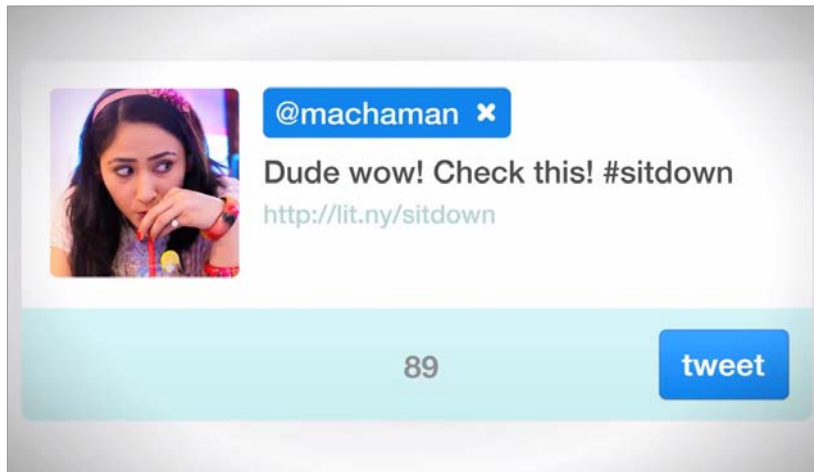


Indian travel agency Kuoni addresses Millennials’ concern about achieving work-life balance in a competitive job market with a TV spot that shows an excited boy preparing for a holiday. He looks over photos from previous trips, packs his suitcase, poses in the mirror with aviator sunglasses and a scarf, and so on. The next morning, he runs into what looks to be his parents’ office, but viewers soon learn the boy is actually an adult employee—the happy kid we saw was his inner child. His boss says an important meeting may take place soon and asks if the guy has to take his holiday now. The man stands firm, responding, “Yes, sir, I have to.” On-screen text reads, “Don’t let your holiday spirit die.”

LIVING A STRESSFUL LIFE (cont'd.)



CASE STUDY: CAFÉ COFFEE DAY, “SIT DOWN”



Responding to the highly stressed lives of its Millennial customers, India’s largest café chain, Café Coffee Day, launched a campaign based around its role as a youth hangout spot. The message was simple: “Sit down.” People were encouraged to take their time, connect face-to-face with friends and also share those experiences online. The chain was positioned as a place where great things happen because customers can sit and relax.

THE DOUBLE-EDGED SWORD OF THE CITY



FIGURE 4B:
The perks of living in a city
Percentage of BRIC Millennials who agree

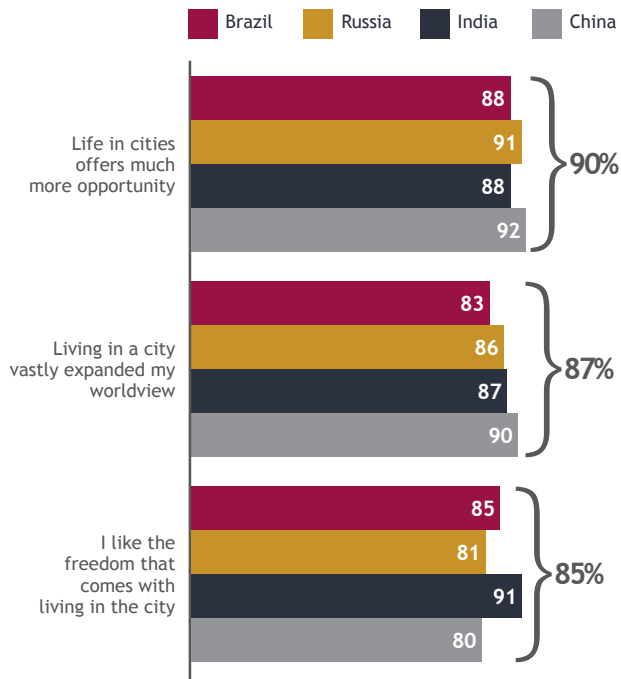
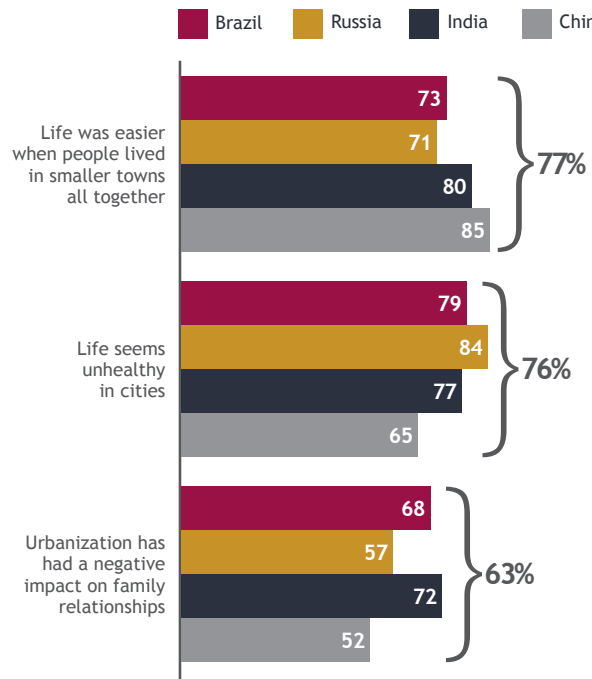


FIGURE 4C:
The ills of urbanization
Percentage of BRIC Millennials who agree



THE DOUBLE-EDGED SWORD OF THE CITY (cont'd.)



A key consequence of the booming growth that BRIC markets have experienced is rapid urbanization and the expansion of cities. Millennials see both the pros and the cons of city life.

On the positive side, wide majorities say they like the freedom that comes with city living (especially Indians), believe that city living has vastly expanded their worldview, and generally regard cities as centers of opportunity. In India, migrating to cities is an aspiration for young people and seen as the means to upward mobility.

On the negative side, more than three-quarters of Millennials believe life was easier in small towns when families lived together and feel that city living seems unhealthy. Some 63% also acknowledge that urbanization has had a negative impact on family relationships, a downside that resonates most among Indians. In China, where cities are regarded as laden with opportunity, migrants from small towns face social pressure to succeed from those back home—and Chinese respondents rank above average in saying that life was easier when people lived in smaller towns.

A resourceful cohort, Millennials frequently take it upon themselves to improve urban life. In Rio de Janeiro and São Paulo, for example, young Brazilians are spearheading vertical gardening projects to help reduce noise, curb global warming and even grow food.

THE DOUBLE-EDGED SWORD OF THE CITY (cont'd.)



CASE STUDY: CREDITEASE, “BELIEVE IN YOURSELF, BELIEVE IN LOVE”



In a spot for CreditEase, a young couple arrives at his parents' rural home for Chinese New Year. The elderly mother dotes on her daughter-in-law, making sure she's warm when the power goes out, giving her meat from her own plate and bonding over a heart-to-heart conversation. The son says they won't be able to visit again for Chinese New Year because he has to work overtime in the city. When the spot flashes forward to the next celebration, with the families eating in their respective homes, viewers can't help but feel sad that the two generations aren't together. But the daughter-in-law pulls out a booklet outlining CreditEase's services and suggests they can buy a bigger home that will accommodate the parents. The spot concludes with the line, “Managing your finances and your happiness comes naturally.”

THE DOUBLE-EDGED SWORD OF THE CITY (cont'd.)



CASE STUDY: THE NORTH FACE, “GO WILD”



For white-collar workers in Chinese megacities, the drive to succeed has led to intense pressure, long working hours and the type of sedentary day jobs that can be spiritually suffocating. A campaign from outdoor brand The North Face urged people to escape to nature—if only for a weekend.

Set to racing drums, a humorous manifesto spot includes scenes of a man smashing an alarm clock and an office worker shoving files into the arms of a colleague before strolling out. As the commercial spotlights various urban stressors, the drums and voiceover climb to a crescendo; then, finally, a cut to scenes of nature and the sound of a deep exhale. “Your life deserves another possibility,” the voiceover says. “To discover. To release. To gain. Go wild.”

CHANGING GENDER ROLES



GENDER EQUALITY WITHIN REACH



FIGURE 5A:
Gender equality at work and at home
Percentage of Brazilian Millennials who agree

Male Female

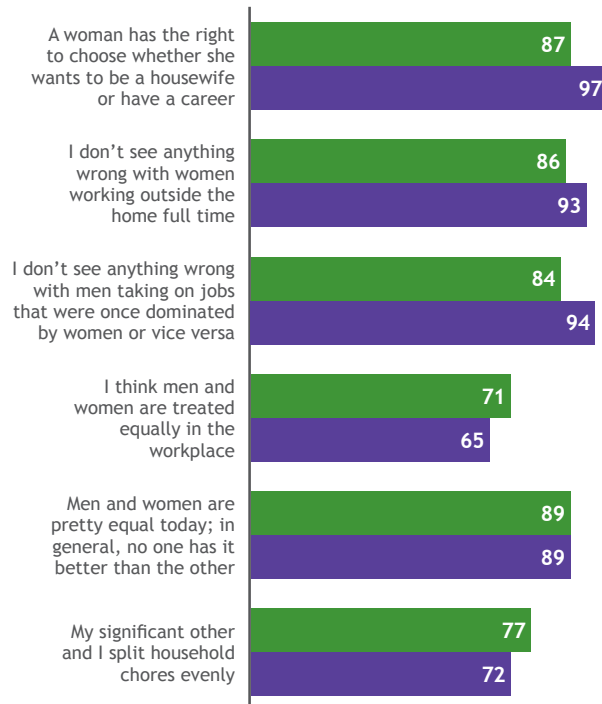
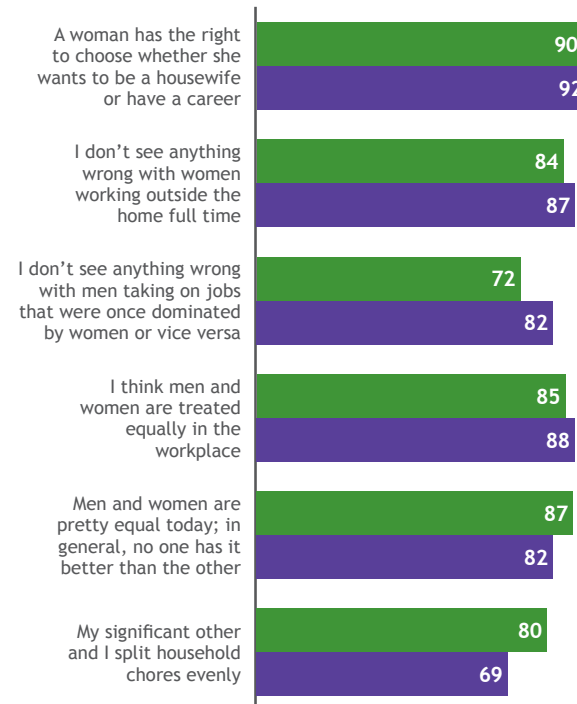


FIGURE 5B:
Gender equality at work and at home
Percentage of Russian Millennials who agree

Male Female



GENDER EQUALITY WITHIN REACH (cont'd.)



FIGURE 5C:
Gender equality at work and at home
Percentage of Indian Millennials who agree

Male Female

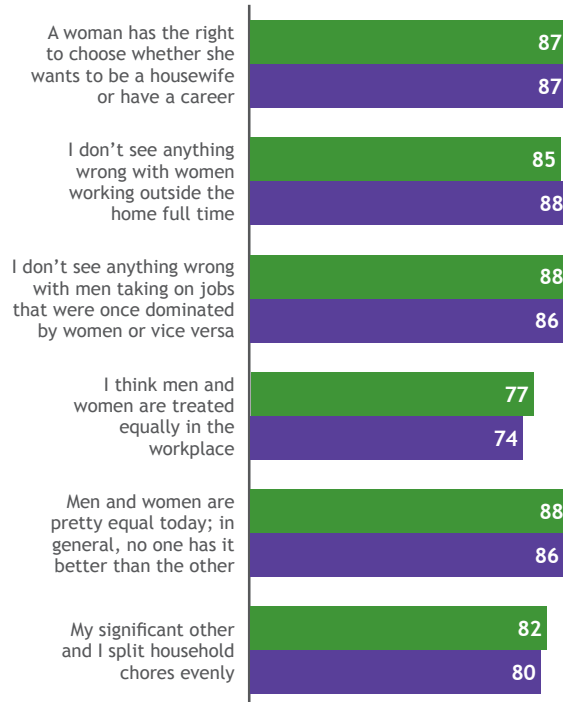
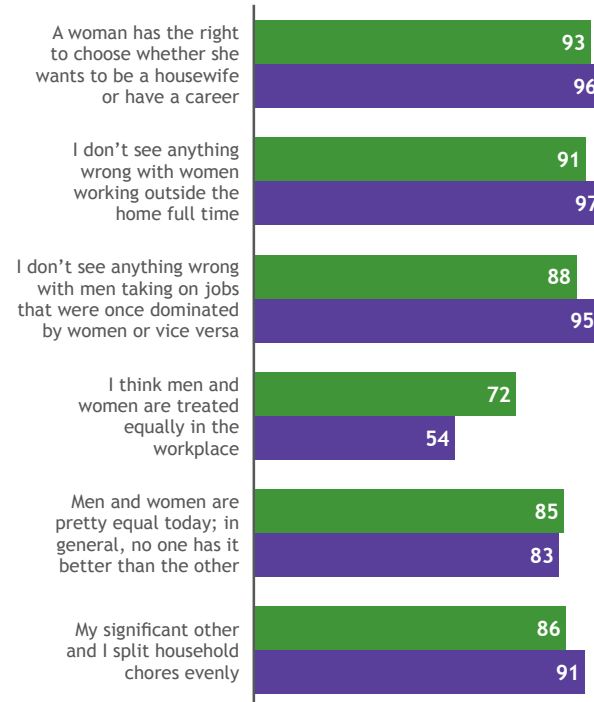
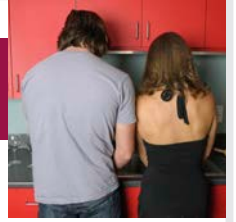


FIGURE 5D:
Gender equality at work and at home
Percentage of Chinese Millennials who agree

Male Female



GENDER EQUALITY WITHIN REACH (cont'd.)



A wide majority (86%) of BRIC Millennials believe men and women are basically equal today and that, in general, neither has it better than the other. And men and women are on par when it comes to managing household responsibilities, with 8 in 10 saying they split chores evenly with their significant other. Still, there is some disconnect between the sexes, especially in regard to workplace equality.

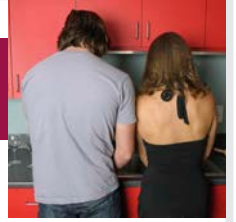
Across all four markets, 76% of Millennial men vs. 70% of women believe the genders are treated equally in the workplace. There's a similar gender gap when it comes to support for women working full-time outside the home, with 87% of Millennial men and 92% of Millennial women finding it acceptable. While 9 in 10 Millennial women don't see anything wrong with men taking on jobs once dominated by women or vice versa, fewer men (83%) feel the same.

In China, where a low 54% of Millennial women believe women and men get equal treatment at work, the conversation has centered around the glass ceiling and the hurdles women face in getting to the top.

In Brazil, workplace rights for women were only added to the constitution in 1988; today, some 65% of women feel that there's workplace equality. A high of 97% of Brazilian women say a woman has the right to choose between being a housewife or a career woman. Millennials in Brazil saw their mothers grappling with the choice, in a culture that had a cavalier attitude toward sexual harassment. Today, the conversation around gender equality is front and center and entering into law.

In Russia, there's an 11-point gap between men who believe they split household chores evenly with their partner (80%) and women who believe this (69%). Russian men are the least likely to accept the idea of men doing traditionally female work and vice versa (72%). Russia—as well as the other markets surveyed—has long had a patriarchal culture. For decades, Russian women had many more household responsibilities than men, although it's commonplace for Russian women to work outside the home. While working women have been making strides in gaining equal rights and opportunities in a number of industries, and the gender gap has been narrowing, Russia lacks a strong cultural or political drive to promote gender equality and other human rights issues.

GENDER EQUALITY WITHIN REACH (cont'd.)



CASE STUDY: TATA TEA, “SMALL BEGINNING”



In India, a spot for Tata Tea takes the stance of not just putting women on par with men but ahead. Bollywood icon Shah Rukh Khan walks the walk by pledging to feature female co-stars ahead of his name in the title credits. Khan is seen being interviewed by a young journalist, telling her women shouldn't be equal to men—rather, they should be ahead in every field, mentioning education, medicine, politics, engineering and media. The journalist counters that male film stars are always billed before female counterparts. Khan calls for a retake of the shot and announces that from now on, he'll get second billing to his female stars. A voiceover says, “For a big change, everyone must make a small start,” and Khan concludes, “We have more to do. Ahead.”

CHANGING GENDER ROLES



Globally, gender is becoming more fluid as women rise in the workplace and men get more involved at home—a trend that looks familiar to BRIC Millennials. Close to 9 in 10 say gender is more flexible than it has been in the past and believe that gender doesn't define a person as much as it used to.

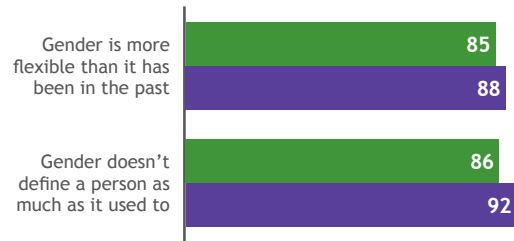
FIGURE 5E:

Gender redefined

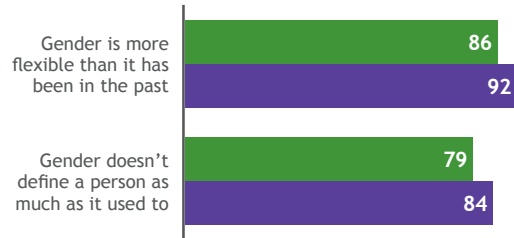
Percentage of BRIC Millennials who agree

Male Female

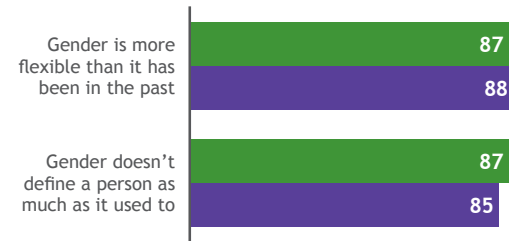
BRAZIL



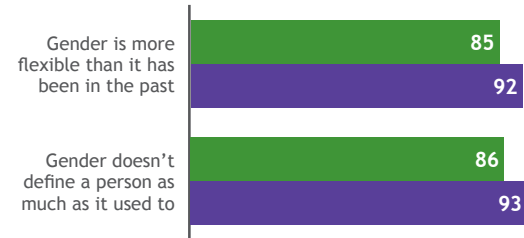
RUSSIA



INDIA



CHINA



CHANGING GENDER ROLES (cont'd.)



CASE STUDY: HERO MOTOCORP, “WHY SHOULD BOYS HAVE ALL THE FUN?”



Many Indian Millennials—both male and female—have embraced gender equality. But most Indian families still believe young women are better off at home after sunset, in part because of the assumption that they’re not safe. Hero MotoCorp aimed to break down this notion with advertising for its female-targeted scooter brand Pleasure.

A TV commercial opens with a free-spirited, confident young woman about to take off on her bike at night when her young male neighbor says her father won’t be happy seeing her step out so late. She dismisses him and is soon joined by friends on their bikes. The spot ends with her dancing at a party along with her father and the line, “Why should boys have all the fun?” Hero MotoCorp taps into a relevant social issue that hampers women but without hurting the sentiments of the older generation.

RELATIONSHIPS, RELIGION AND SOCIETY

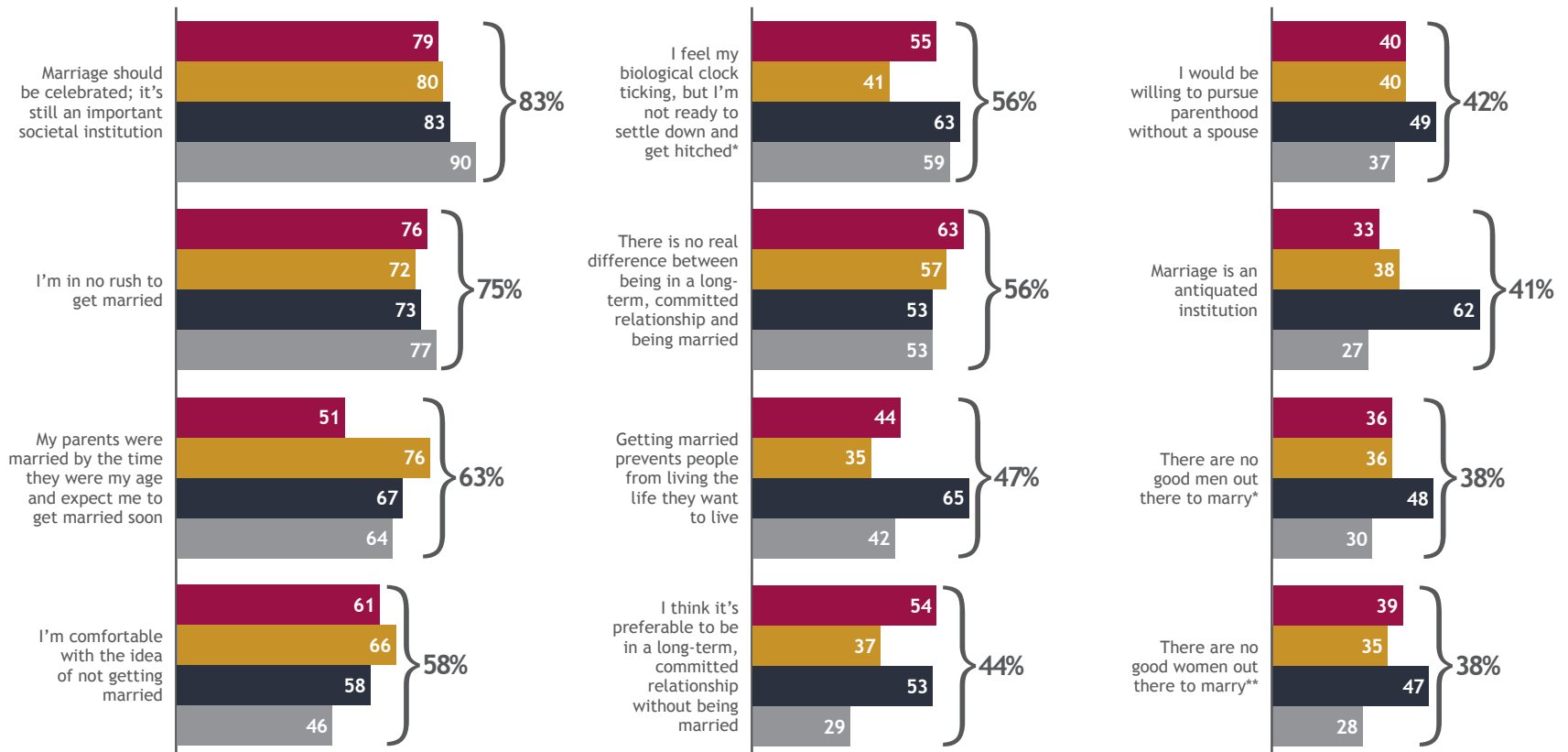


EXTENDING THEIR SINGLE YEARS



FIGURE 6A:
Marriage Optional?
Percentage of BRIC Millennials who agree

■ Brazil ■ Russia ■ India ■ China



*Asked only of women

**Asked only of men

EXTENDING THEIR SINGLE YEARS (cont'd.)



While marriage is still valued among many young people in the BRIC markets, this cohort doesn't necessarily see it as essential, especially in the near future. Almost 6 in 10 are comfortable with the idea of not getting married, and 56% believe there's no real difference between a long-term, committed relationship and marriage. More than 4 in 10 are open to pursuing parenthood without a spouse. And as many as three-quarters say they're in no rush to tie the knot.

Millennial men across all markets are especially tepid on marriage. In some instances, there's a substantial gap in mindset between the genders: For instance, 50% of the men surveyed believe a long-term, committed relationship is preferable to marriage, compared with 38% of women. (See Appendix, Figures 6F-I.)

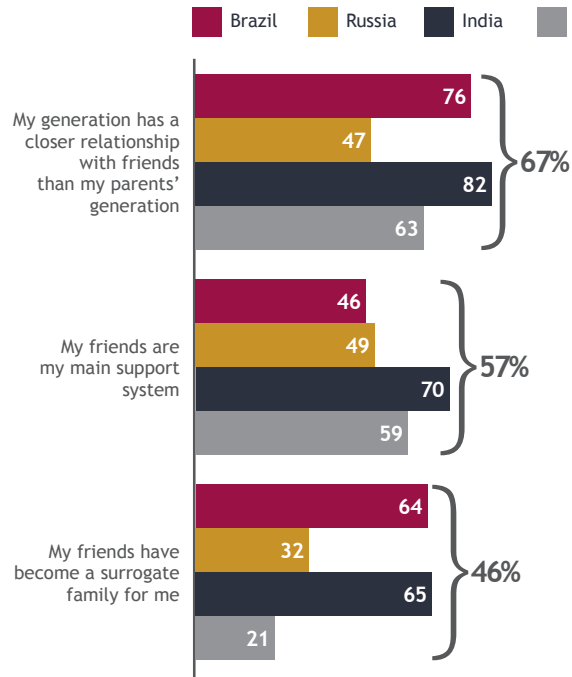
With many Millennials extending their single years, there's evidence of generational conflict—63% of Millennials say they're at an age when their parents were already married, and they're expected to get married soon. More than three-quarters of Russian Millennials agreed with this statement.

Although Millennials aren't making marriage a top priority, only a minority (4 in 10) believe marriage is an antiquated concept. And 83% say it should be celebrated as an important social institution. This is especially true among Chinese Millennials (90%). In India, marriage is big and fashionable, and most Millennials look forward to this hallmark—at the same time, however, a majority say marriage is an antiquated institution and feel reluctant to give up their individual pursuits for new responsibilities (almost two-thirds believe marriage prevents people from living the life they want to live).

FRIENDS AS FAMILY



FIGURE 6B:
Relationships with friends
Percentage of BRIC Millennials who agree



With young people moving to cities and living together on their own, and as nuclear families become less close knit, friends are the new family. Many Millennials believe they have a closer relationship with friends than their parents' generation (67% say as much), especially in Brazil and India.

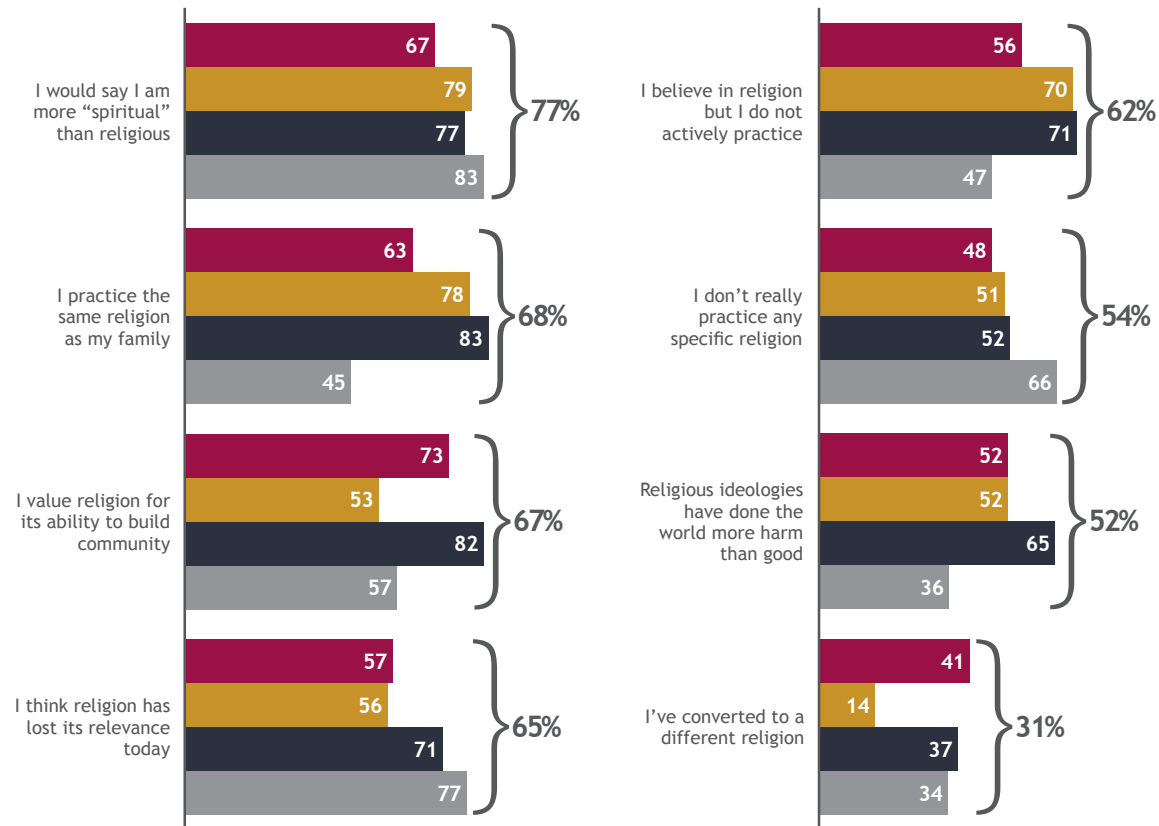
Similarly, Brazilian and Indian youth are far more likely than Russian and Chinese Millennials to say their friends have become a surrogate family. Indian Millennials are the most likely to see their friends as their main support system (70%, compared with an overall average of 57%).

RELIGION AND YOUNG PEOPLE



FIGURE 6C:
Religion today
Percentage of BRIC Millennials who agree

■ Brazil ■ Russia ■ India ■ China



RELIGION AND YOUNG PEOPLE (cont'd.)



Of all the BRIC markets, Indian Millennials are the most religious. Religion remains a key part of the Indian identity, helping to define who these young people are and dictating whom they will marry. While 7 in 10 claim they don't actively practice a religion, most young Indians carry the same faith as their parents (83%, notably higher than the overall average of 68%). Indians are also the most likely to value religion for its ability to build community (82% vs. an overall average of 67%).

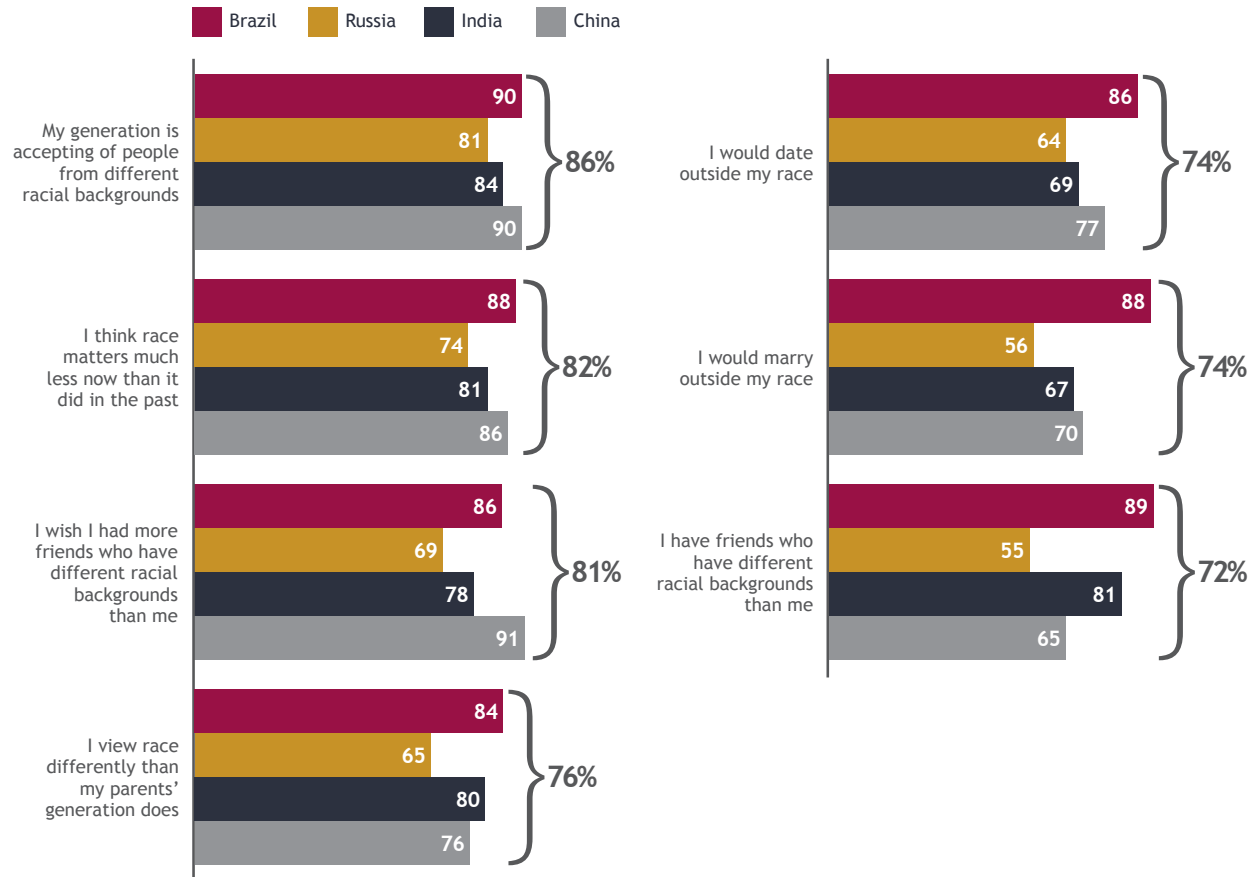
Conversely, Chinese Millennials are the most likely to say they don't really practice any specific religion (66% compared with an overall average of 54%) and to identify as "spiritual" more than religious (83% vs. an overall average of 77%).

In Russia, where the government promotes and defends its ideas via the Russian Orthodox Church, Millennials mostly demonstrate independent views.

RACE RELATIONS



FIGURE 6D:
A raceless generation
Percentage of BRIC Millennials who agree



RACE RELATIONS (cont'd.)



BRIC Millennials regard their generation as one that's accepting of racial differences, setting themselves apart from their parents on this issue. For this cohort, race seems to matter significantly less than it did in the past.

Seven in 10 Millennials report having friends of different racial backgrounds, and a higher percentage (81%) say they wish they had more racially diverse friends. Beyond friendship, three-quarters would date or marry outside their race. Millennials in Brazil, the most racially mixed country in the BRIC group, are most open to interracial relationships.

In India, where caste is the chief social differentiator, social acceptance of inter-caste marriage is slowly rising.

LGBT ISSUES

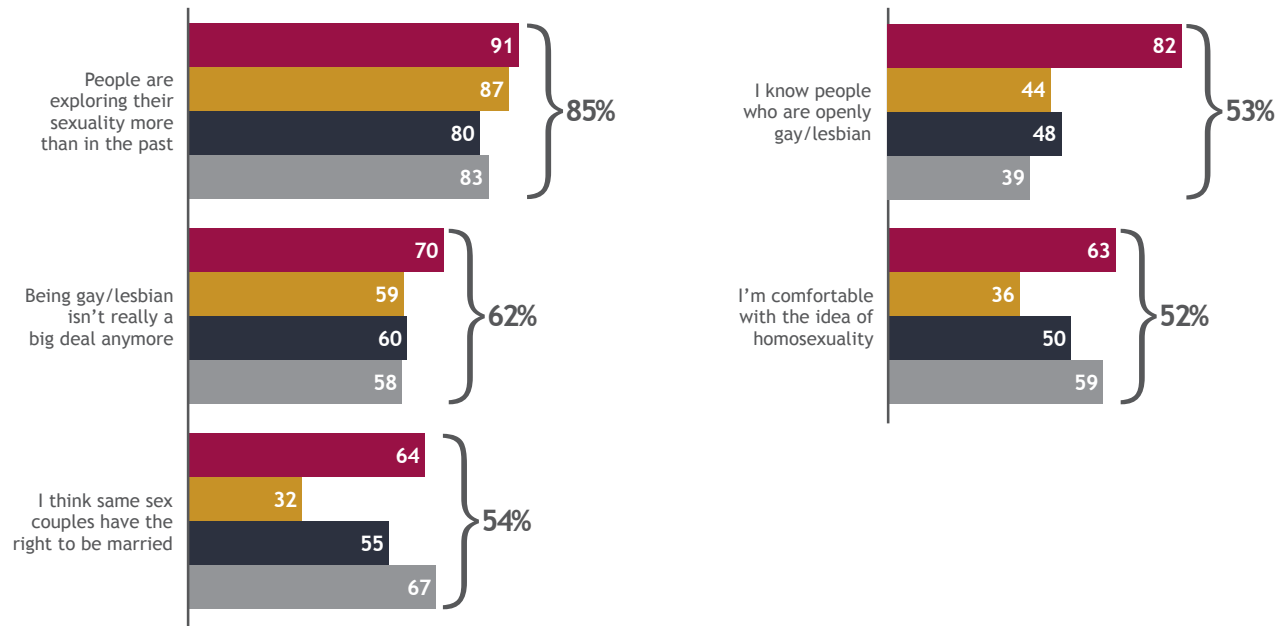


FIGURE 6E:

Lesbian, gay, bisexual and transgender issues

Percentage of BRIC Millennials who agree

■ Brazil ■ Russia ■ India ■ China



LGBT ISSUES (cont'd.)



When it comes to homosexuality, Brazilian Millennials are the most open and accepting: 70% feel that being gay or lesbian isn't really a big deal anymore compared with the overall average of 62%. And while just over half of all BRIC Millennials report feeling comfortable with the idea of homosexuality, 63% of Brazilians say they are comfortable with it. Familiarity helps to breed comfort: Brazilians are much more likely to know openly gay or lesbian people: 82% compared with an overall average of 53%.

When it comes to same-sex marriage, Millennials in Brazil (where gay marriage is legal) and China are most supportive. Indeed, these cohorts are both twice as likely to support gay marriage as Russians, with only 32% of this cohort in favor of the idea. (For more on the topic of homosexuality in Russia, see page 55.)

LGBT ISSUES (cont'd.)



CASE STUDY: FASTRACK, “THE CLOSET”



In our survey, slightly fewer than half of young Indians said they know people who are openly gay or lesbian. Most of India’s gay community is too scared to come out of the closet—homosexual intercourse was considered a criminal offense as recently as 2009, and the subject itself is taboo in Indian society. But attitudes are changing, with more depictions of homosexuality in both movies and media. Youth watches and accessories brand Fastrack urges its Millennial consumers to “come out of the closet” with a suggestive commercial that shows a young woman emerging from one side of a hot pink wardrobe, followed by a second woman exiting from the other door. The brand gives a push to this generation to stop accepting societal shackles and display their individuality with pride.

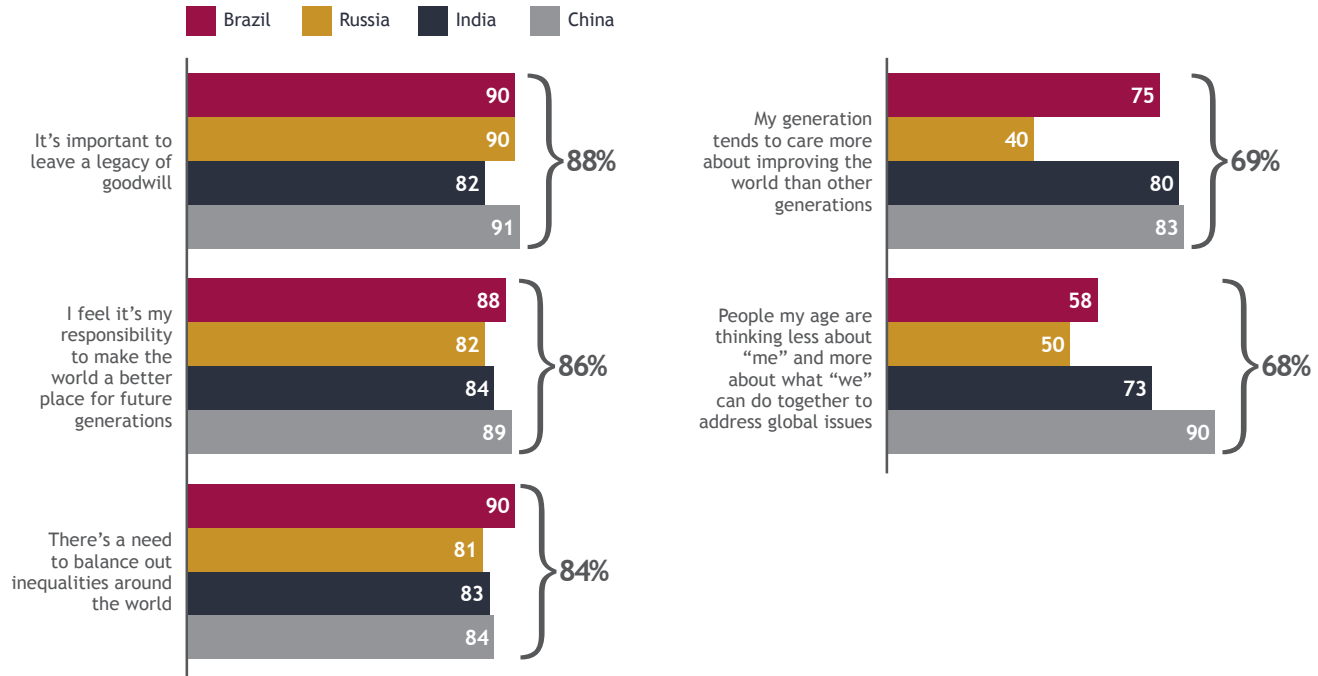
SOCIAL GOOD



HEAL THE WORLD



FIGURE 7A:
For the greater good
Percentage of BRIC Millennials who agree



HEAL THE WORLD (cont'd.)



Most BRIC Millennials believe they must leave a legacy of goodwill and help forge a better world for future generations. They also acknowledge a need to address inequalities around the globe, with Brazilians most inclined to agree.

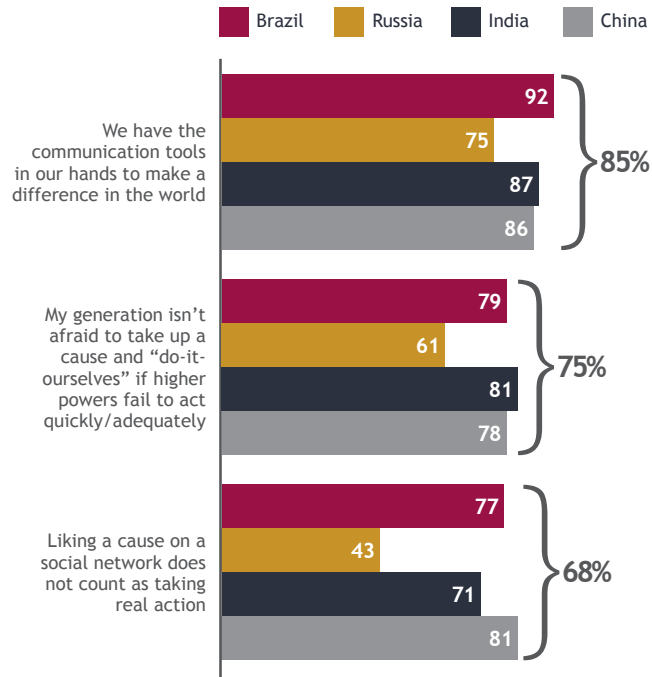
When it comes to collective action aimed at serving the greater good, close to 8 in 10 Millennials in Brazil, India and China believe they care more about improving the world than other generations. And a majority in these three markets believe their peers are focused less on themselves and more on what they can do together to address global issues; Chinese respondents over-index here, with 9 in 10 believing this is true.

Russia is a notable exception, with these Millennials not nearly as inclined as others to see their generation as one that's uniquely focused on collective ways to improve the world. Less dependent on the state and social programs than previous generations, young Russians feel as though they've been left in charge of taking care of all their own needs. As a result, their paradigm is more "me" than "we," a contrast with previous generations inspired by Soviet collectivist ideas.

DIY ACTIVISM



FIGURE 7B:
Civic activism
Percentage of BRIC Millennials who agree



Today's young adults feel empowered to bring about change. Eight in 10 Millennials in Brazil, India and China say their generation isn't afraid to take up a cause and "do it ourselves" if the establishment doesn't act quickly or adequately. Empowered by technology, this cohort (and especially young Brazilians) widely believes they have the communication tools to make a difference. At the same time, most young Brazilians, Indians and Chinese reject "slacktivism," believing that "liking" a cause doesn't equate with real action.

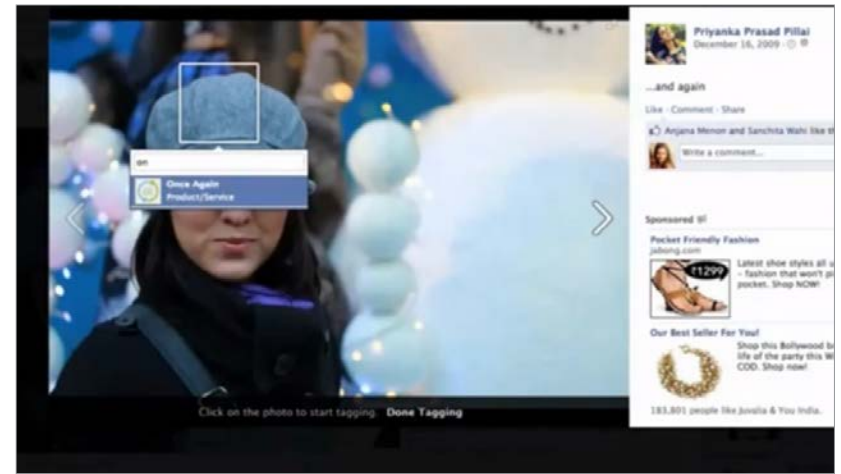
Russians stand apart here—they are significantly less likely to believe they can bring about dramatic change in their nation, especially after recent opposition attempts.

In addition to technology, economic growth is helping to drive awareness and action in these markets. One of our Indian planners points out: "This generation is the most confident, opinionated, resourced with money, technology and optimism, which drives them towards social activism. They aren't struggling like their parents—they have the time and resources, so they take up issues."

DIY ACTIVISM (cont'd.)



CASE STUDY: ONCE AGAIN, “TAGGING DRIVE”



Once Again, a Bangalore-based charity, sought to turn donating from a boring chore into a fun activity for a generation that seeks to improve the lives of others. To encourage Indians to donate used goods, Facebook users could cull through friends' old photos and tag worn-out items as “Once Again.” The tags drove people to the charity’s Facebook page, where they saw a reminder that “Someone, somewhere needs your old stuff more than you.” This modern donation drive resulted in more than 50,000 items handed over to Once Again.

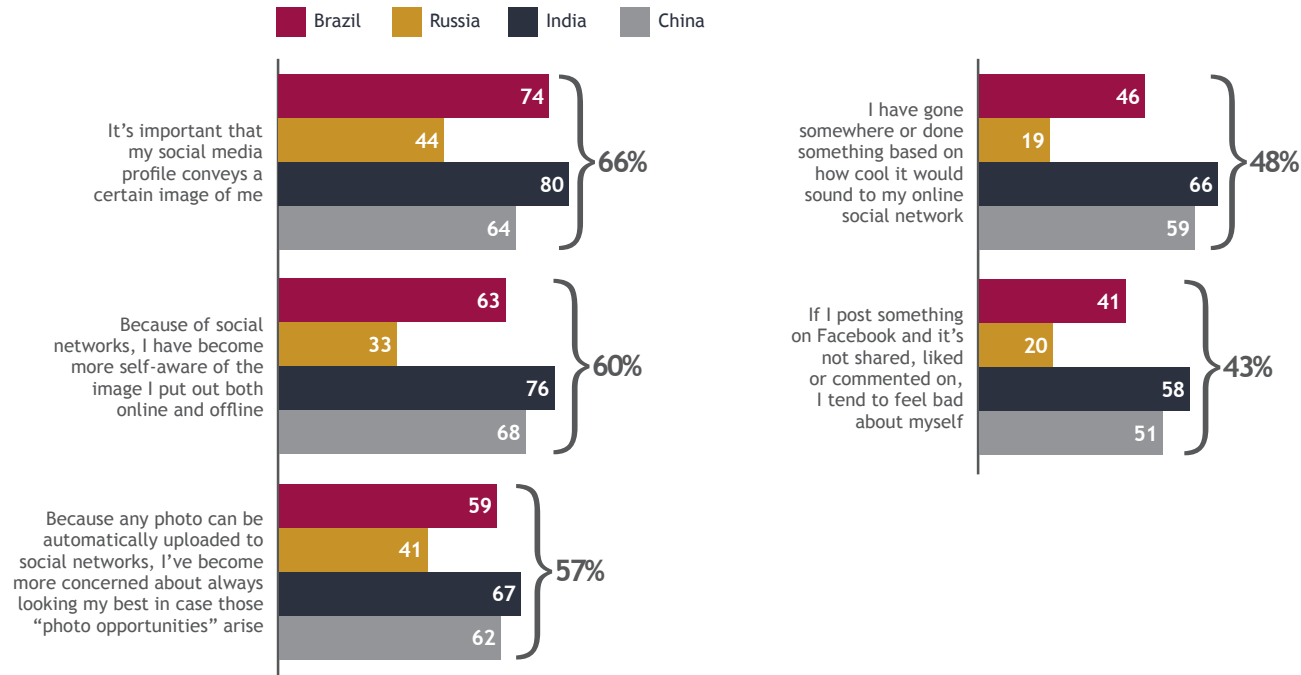
SOCIAL MEDIA



BROADCASTING THE CURATED SELF



FIGURE 8A:
Social media and self-image
Percentage of BRIC Millennials who agree

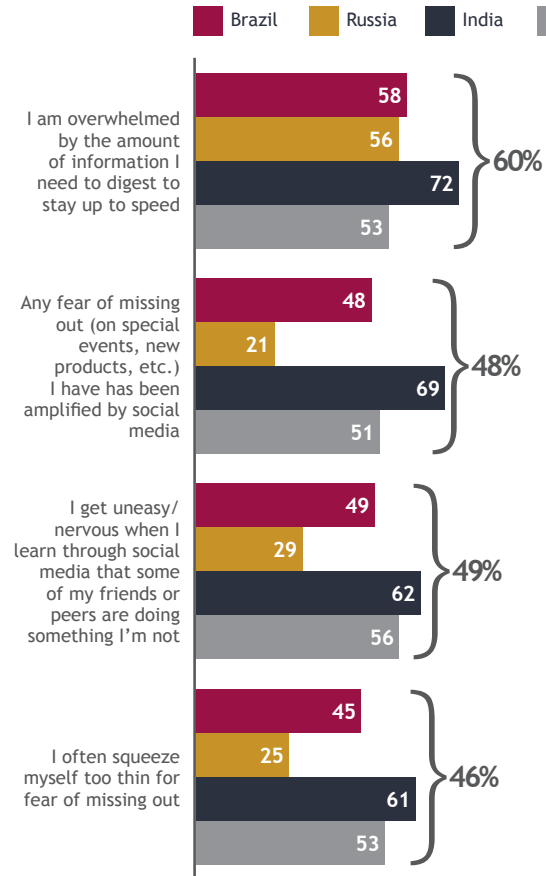


Thanks to social media, many in this generation have developed a hyper-self-awareness, a sophisticated ability to craft a public image and an unprecedented dependence on peer validation. In the BRIC markets, this trend is most evident in India, followed by China and then Brazil. In Russia, only a minority of Millennials feel similarly affected by social media.

SOCIAL MEDIA-DRIVEN FOMO



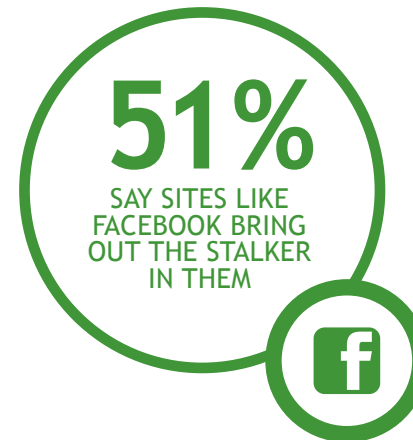
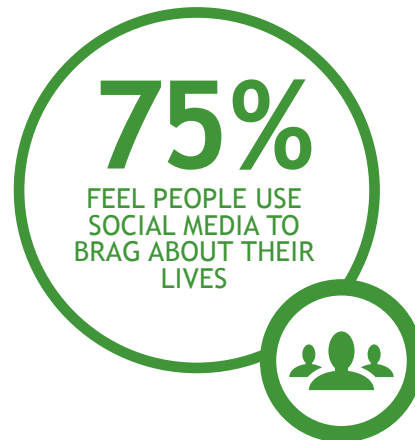
FIGURE 8B:
Life in overdrive
Percentage of BRIC Millennials who agree



SOCIAL MEDIA-DRIVEN FOMO (cont'd.)



Across markets and generations, social media is driving an uneasy and sometimes all-consuming fear of missing out. Consumers fear that their peers are in the know about, doing or in possession of more or something better than them. In the BRIC markets, Indian Millennials are again the most affected by this trend, followed by Chinese and then Brazilian respondents. FOMO is far less prevalent among Russian Millennials.



SOCIAL MEDIA-DRIVEN FOMO (cont'd.)



CASE STUDY: FIAT, “SOCIAL DRIVE”

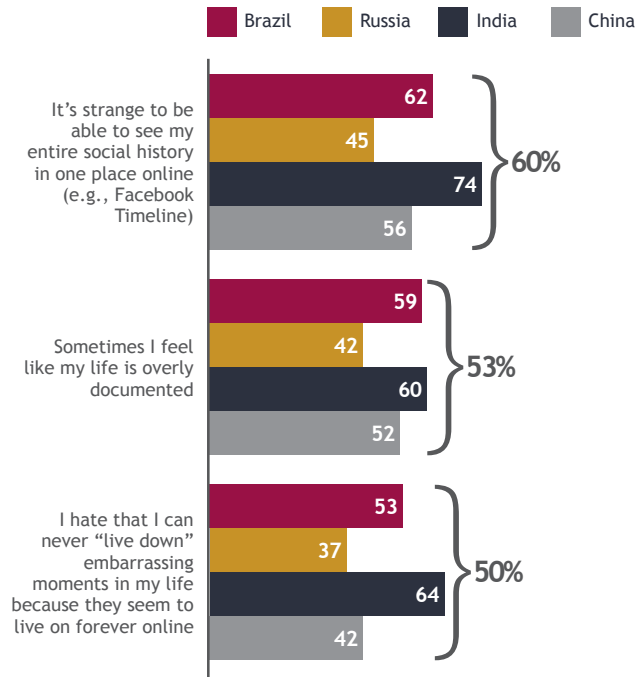


Brazilian Internet users are highly engaged with social networks, and almost 6 in 10 Brazilian Millennials in our sample agreed they are overwhelmed by the amount of information they need to digest to stay up to speed. Last year, Fiat added a feature to its Punto line that lets drivers safely check their networks while on the road. Social Drive syncs with Bluetooth-enabled phones, with drivers able to use voice commands to hear text-to-speech updates on the friends they're most interested in keeping tabs on. In the first month that Social Drive was on the market, sales increased by 96% over the previous month.

SHARE NO MORE



FIGURE 8C:
Sharer's remorse
Percentage of BRIC Millennials who agree



The radical transparency that social media helps to enable has driven some remorse and resistance among the generation that has most enthusiastically embraced the urge to share online. With Indian Millennials the most caught up in social media among BRIC's youth, they are also the most apt to second-guess their relationship with social media. Conversely, Russians are least caught up in social media and are least apt to feel sharers' remorse.



APPENDIX: ADDITIONAL CHARTS

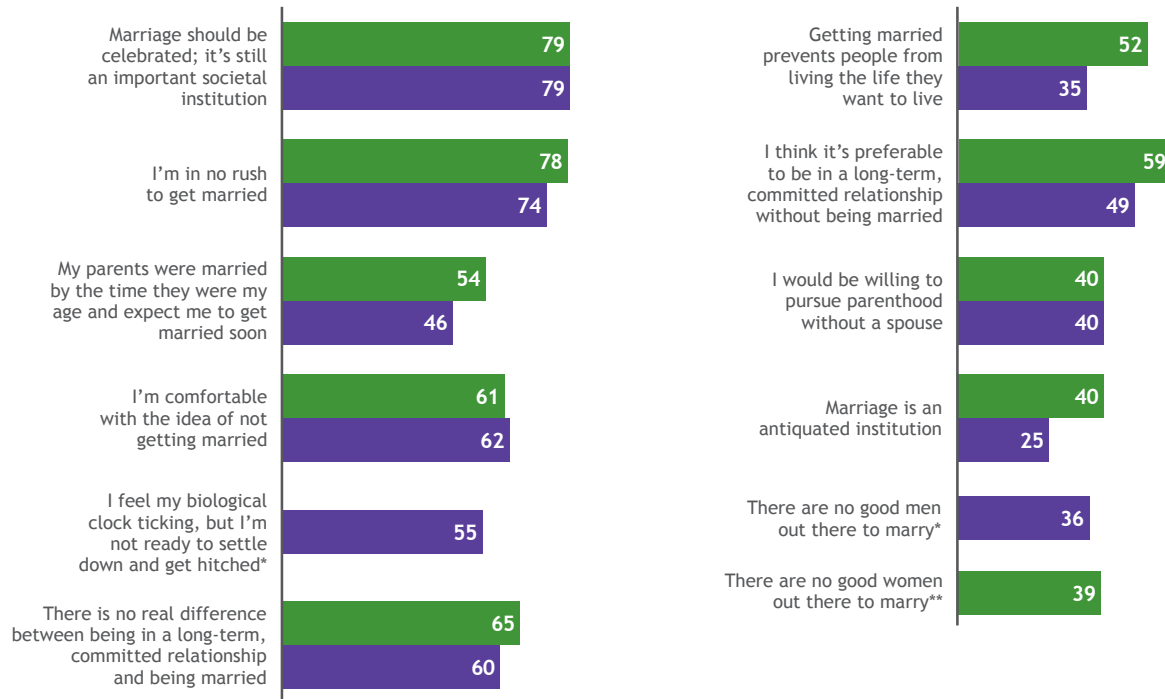


APPENDIX: ADDITIONAL CHARTS



FIGURE 6F:
Marriage Optional?
Percentage of Brazilian Millennials who agree

Male Female

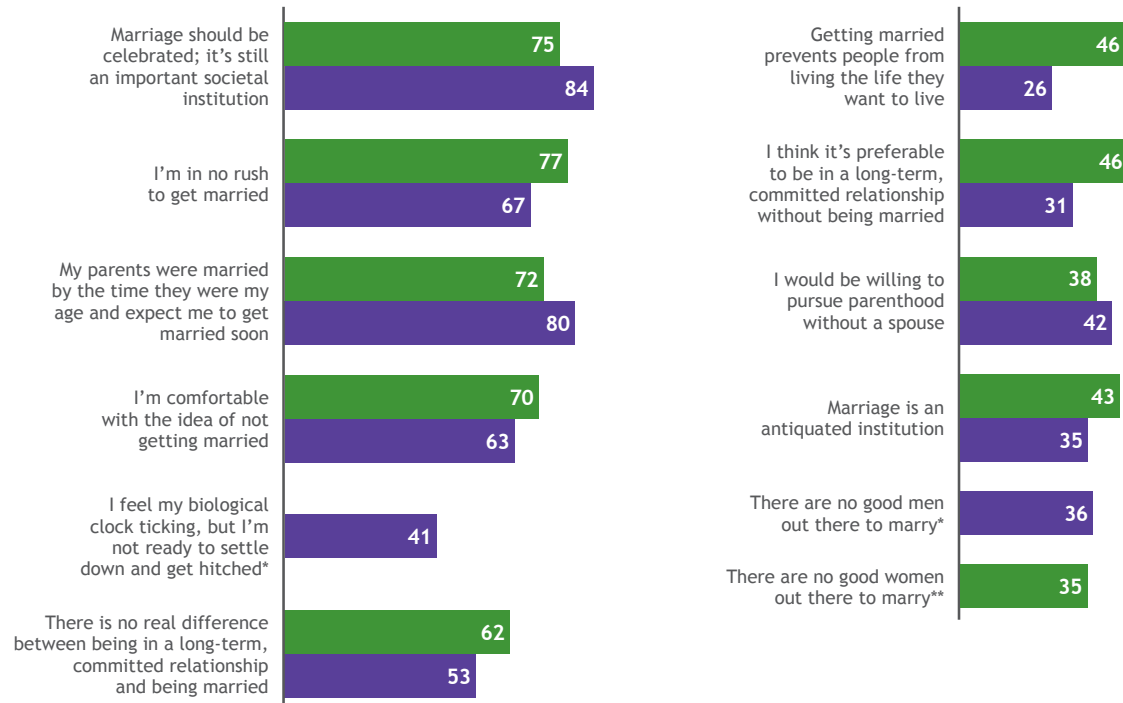


APPENDIX: ADDITIONAL CHARTS



FIGURE 6G:
Marriage Optional?
Percentage of Russian Millennials who agree

Male Female

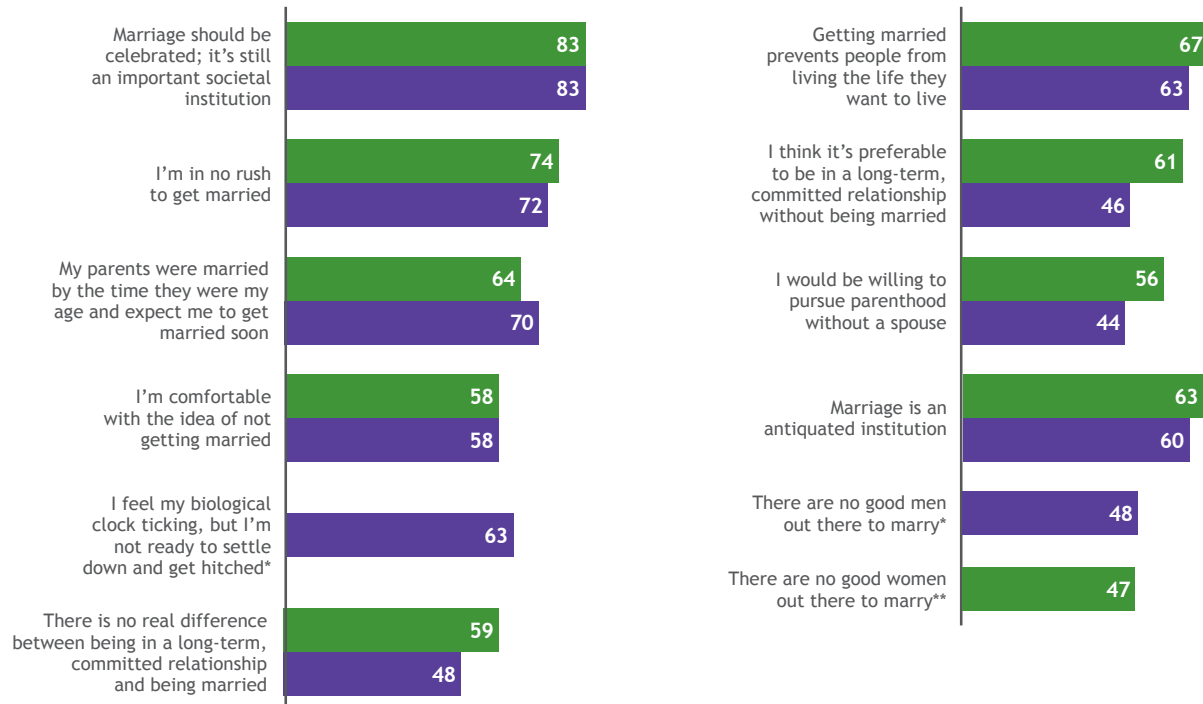


APPENDIX: ADDITIONAL CHARTS



FIGURE 6H:
Marriage Optional?
Percentage of Indian Millennials who agree

Male Female

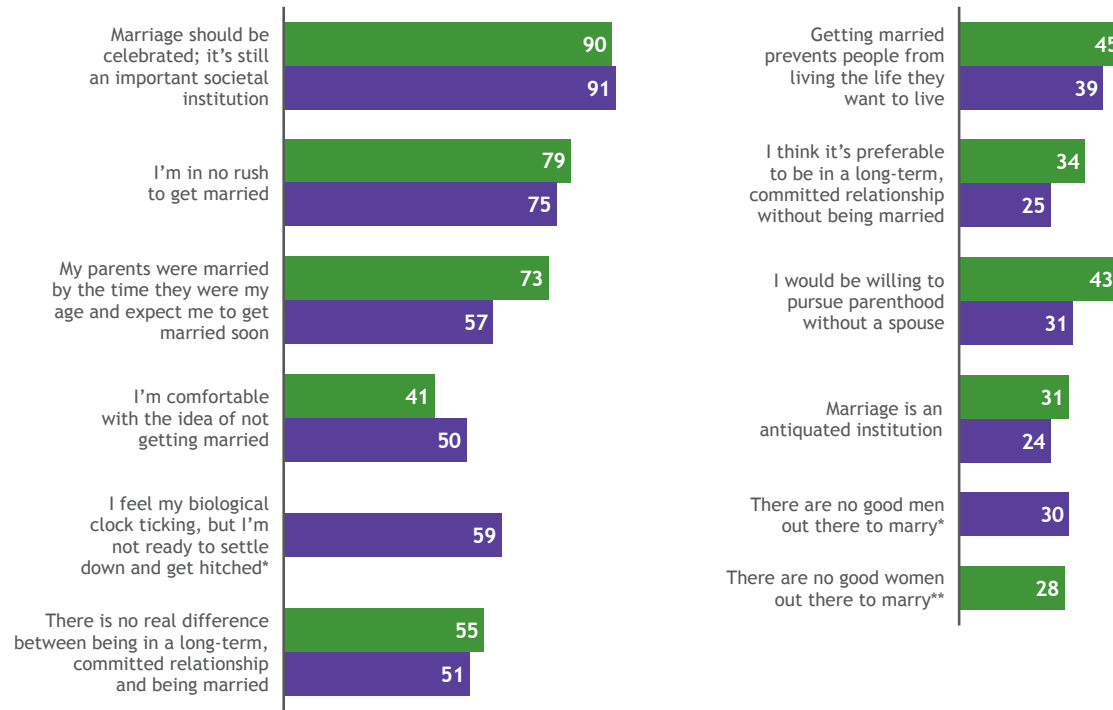


APPENDIX: ADDITIONAL CHARTS



FIGURE 6I:
Marriage Optional?
Percentage of Chinese Millennials who agree

Male Female



*Asked only of women
**Asked only of men

THANK YOU

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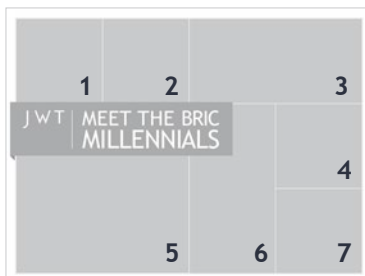
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MEET THE BRIC MILLENNIALS

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