

## Telefónica Global Millennial Survey:

**Money isn't everything: Young adults in Germany prefer fun at work and a good working environment.**

### **About the Telefónica Global Millennial Survey**

The Telefónica Global Millennial Survey is the largest and most comprehensive study of the generation of young adults aged between 18 and 30 years old.

Representatives of this digital generation – so-called millennials – have grown up with the Internet and mobile communication. Millennials are the leaders and innovators of tomorrow: Their attitudes, how they live and work, will have a determining influence on the development of business, politics and society.

The survey provides insights into the hopes, worries, beliefs and dreams of this generation. Understanding them is especially important for Telefónica as an internationally operating telecommunications company. It is essential for showing the coming generation the opportunities offered by digital technology and empowering them to utilise the benefits for themselves – be it to pursue innovative business ideas or to do their bit for society.

After its debut in 2013, the Telefónica Global Millennial Survey was conducted again in 2014. As well as the overarching issues relating to the attitudes and hopes of the millennial generation, this time there was an extra regional focus on Latin America.

### **About the method**

In collaboration with Penn Schoen Berland, a renowned international market research company, Telefónica conducted 6,702 quantitative online and offline interviews with young adults aged between 18 and 30 in 18 countries of the regions North America, Latin America and Western Europe. The study consists of 185 questions and was carried out in the period from 23 June to 4 August 2014.

The respondents were adult millennials from the USA, Spain, Germany, the UK, Brazil, Mexico, Argentina, Peru, Chile, Columbia, Venezuela, Ecuador, Costa Rica, Panama, Nicaragua, Guatemala, El Salvador and Uruguay.

## Results

### **CAREER AND WORK: Money isn't everything**

**Young adults in Germany do want a career. But a fun working environment and a humane nurturing workplace environment is more important to them than money. Also the work-life balance has a high priority.**

- They are choosy when it comes to job hunting and evaluating companies: Almost every second person (47%) cites the most important criterion of a new company is offering a fun working environment. Just as important is a good work-life balance (41%). Whereas a high salary and a kind and caring working environment came third (32%) for the young German adults. By way of comparison: For millennials in the USA, pay is considerably more important, while in Latin America opportunities for further development are a significant criterion.
- For young adults in Germany, a good education is the most important requirement for a successful career. They believe that students of IT, business sciences, engineering and medicine have the best opportunities for a good career, while history and literature students have the least career opportunities.
- The next most important life step for most of them is career planning: Nearly every second German millennial cites finding a well-paid, stable job as the most important life goal in the next ten years. Children, owning their own home and marriage are the next most important life goals.
- Wide interests: German millennials would most like to work in the creative or technology industry, although their professional interests are wide-ranging.
- Good prospects but little entrepreneurial spirit: 80% of young adults believe that conditions in Germany are good for setting themselves up as an entrepreneur and getting their ideas onto the market (previous year: 73%). However, only one in ten plans to go into business for themselves. In the USA, on the other hand, nearly one in four is planning to do so, and in Latin America it's even one in three.
- German millennials are professionally mobile like no other generation before them: Every second one wants to work abroad, with the most popular destination being the USA, followed by Western Europe and Australia. But millennials in other countries and regions are considerably more mobile than those in Germany.
- A large majority of millennials consider the most important technical skill in their professional life to be the common Office applications (62%), followed by coding (36%). They do not believe that mastering social media or cloud applications plays an important part in careers yet.

### **TECHNOLOGY: Always at the cutting edge**

**German millennials are open to new technologies and the possibilities of the digital world. For most of them, doing without a smartphone in their life is virtually unthinkable, but pure telephoning has become only the fourth most popular use for smartphones.**

- Millennials consider themselves on the cutting edge of technology: these are 79% of German millennials, with young men rating their technical expertise higher than young women.
- For young adults in Germany, the smartphone is the most important access point to the digital world: 83% of German millennials own a smartphone, 85% of the woman and 81% of the men. In the USA only 79% of the millennials have a smartphone, only 74% in Latin America. 79% of the German millennials have a laptop and around half have a desktop computer (53%).
- And they use their smartphones almost constantly: On the day of the survey, at least every second millennial interviewed had used their smartphone mainly for mobile data such as reading the news (60%) or visiting a social network (57%), or they had sent a text message (54%). Pure telephoning (39%) was only the fourth most popular use for a smartphone among German millennials. By way of comparison: Their counterparts in the USA and Latin America still use their smartphones much more frequently for phone calls.
- According to German millennials, mobile technologies are changing many areas of life: They see the biggest of these transformative changes in the fields of entertainment (85%), news (82%) and maintaining social contacts (83%). Over half of respondents even admit an impact on their love life (55%). Millennials in the USA and Latin America also admit to experiencing big changes through mobile technologies in education, job hunting, banking and personal expression.

#### **DATA PROTECTION: Less online protection than in the USA**

**Although they worry about data security and protection of their privacy, German millennials protect their online security not as actively as the young adults in the USA and Latin America. They want reliable data protection regulations from the government.**

- 85 percent of German millennials worry about the security and protection of their data on the Internet – a third are even "very worried".
- 72% are specifically afraid of data theft or hackers. Three out of four millennials therefore actively protect themselves against data theft – which puts them behind their age group in the USA (90%) and Latin America (89%).
- The majority of German millennials (65%) see it as the government's responsibility to regulate the protection of data through laws when it comes to new technologies. For their counterparts in the USA and Latin America it is also important (59% each).
- 59% of millennials in Germany believe they have control of their private data – in the USA and Latin America more than 80 percent believe that. However, a third of respondents in Germany also state that they don't know exactly what companies do with their data. This makes German millennials considerably more sceptical on the subject of data protection than their age group in other countries.
- While German millennials consider protection of their privacy the most important value on the Internet, their counterparts in the USA value more highly the freedom to access any content. For German millennials the quality and speed of the Internet connection are also an important value.

## EXPECTATIONS OF THE FUTURE: Young adults are confident

German millennials are optimistic about the future, if somewhat less so than their contemporaries in North and Latin America. They appreciate Germany's strengths as an export nation with a good infrastructure, but want the government to invest more in education and affordable housing.

- The vast majority of young adults in Germany are content with their life (86% - q5) and optimistic about their personal future: 81% of German millennials consider themselves fairly or very optimistic (q7). In the USA and Latin America young adults are even more optimistic.
- When it comes to Germany's future development, millennials are more confident than they were a year ago: 58% believe that the best is yet to come for Germany (previous year: 47%), with men responding more positively than women. Globally, German millennials see Asia as the most important economic growth region of the future, followed by Western Europe and North America. In the USA and Latin America, on the other hand, millennials see their own respective regions out in front.
- When asked about Germany's strengths, the young adults cited its good infrastructure, booming foreign trade and its education system. Germany's biggest problems, in their view, are social inequality, corporate greed and unemployment.
- Although millennials basically see the German education system as a strength, every second respondent (56%) expects the government to invest more in it. Equally important for them is investment in safe and affordable housing.
- The biggest global challenges, according to German millennials, are poverty, war and political instability, followed by concerns about growing social inequality and the environment. 86% believe the gap between rich and poor is also growing in Germany. Millennials in the USA also consider healthcare to be one of the biggest global problems, while in Latin America it's corruption.
- When asked what particularly shapes their attitudes, German millennials responded with family, school and friends. Religion, which is an influencing factor for a quarter of US millennials and almost a third of young Latin Americans, hardly plays a role among young Germans.

All results of the Telefónica Global Millennial Study can be found at [www.telefonica.com/millennials](http://www.telefonica.com/millennials). You can follow the discussion online at #TEFMillennials.

### Embargo and publications

- The embargo for all results of the Telefónica Global Millennial Study ends on **Monday 13 October at 7.30 p.m. German time.**
- The results of the Telefónica Global Millennial Study will be presented for the first time on 13 October as part of the Futurecom in Sao Paulo.
- In Germany the results of the study will also be announced in the press blog at [www.telefonica.de](http://www.telefonica.de) on 14 October.

## Quotes

“The generation of young adults are the innovators of tomorrow. For us, it’s important to understand how they think, because – being one of the largest telecommunications providers in Germany – it’s our aim to become the leading digital telco and to create relevant added value for our customers,” says Valentina Daiber, Director Corporate Affairs of Telefónica Deutschland. “The results of the survey help us develop the right products for this generation so that young people are able to realise their ideas and further shape the digital world.”

“A third of our customers – over 100 million – are millennials as well as 30,000 of our employees. By taking the pulse of this critical cohort – tomorrow’s civic, business and political leaders – we have gained tremendous new insights into the future of both our industry and our world.” said José María Álvarez-Pallete, chief operating officer, Telefónica S.A. “It’s very encouraging to see how optimistic millennials are about their ability to improve their own lives and the lives of others, and how deeply they care about strengthening education and building their careers.”

## Telefónica’s activities

In alignment with the survey results that shed affirming light on the power of technology to affect societal change and empower this next generation of leaders and innovators, Telefónica believes the possibilities of technology should be open to everyone and is engaged in several significant activities that make a real impact on the lives of people and society. These programs include:

- **Think Big:** Telefónica's aim is to boost the spirit of innovation and entrepreneurship in young people. With its international programme Think Big, Telefónica inspires young people between the ages of 14 and 25 to develop digital ideas, helps them get their own charitable projects off the ground and thereby further develop their digital skills. Think Big is a long-term programme of the Fundación Telefónica and the German Children and Youth Foundation (DKJS) in conjunction with O2. It aims to stimulate the commitment, creativity and initiative of young people and show how they can put their ideas into practice themselves with the help of digital media. The programme supports young people on four levels, from inspirational digital workshops through to individual project mentoring by Telefónica staff.
- **Talentum:** This initiative from Telefónica creates career prospects for young people, be it through student trainee placements, internships, training, "dual" courses or the graduate programme. The aim is to train participants as best possible for a career in the digital world and to underpin the company's success with innovative and talented young people.
- **Wayra:** Programme set up by Telefónica with the aim of finding talented people from the fields of the Internet and new information and communication technologies in Europe and Latin America, supporting them and thus paving the way for innovation. Wayra supports budding entrepreneurs with top mentors, access to the latest corporate technologies, state-of-the-art workplaces and funding.
- **Campus Party:** Telefónica is the chief sponsor of Campus Party, the world's largest Internet technology festival. Thousands of participants come together for seven days in varying locations around the world to take part in talks,

workshops and competitions. In summer 2012 the first pan-European Campus Party was held in Berlin.

- **UDL Digital:** The event series "Unter den Linden Digital" sees experts meet regularly to discuss current topics from the fields of mobile communication, Internet and digital society. Representatives from politics and business meet with journalists, citizens, bloggers and web communicators for expert talks.
- **Cooperation with the "Digitale Chancen" Foundation:** On the way to the digital society, no group should be left behind. Access to the digital and mobile world should be facilitated not just for the young generation but also for older people. Together with the "Digitale Chancen" Foundation, we launched the project "Tablet PCs for seniors" in 2012. Since then, selected institutions for elderly people in Germany have been kitted out with tablet PCs.

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### Appendix

#### CAREER AND WORK

Which field of study do you believe is most important for ensuring your personal future success?	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Economics	3%	8%	7%	9%	7%	11%
Foreign Languages	3%	14%	11%	9%	5%	13%
History	2%	1%	2%	1%	1%	1%
Literature	3%	1%	2%	1%	1%	.%
Mathematics	5%	4%	5%	2%	4%	1%

Biology/Chemistry	5%	3%	5%	4%	4%	5%
Business	14%	10%	10%	11%	12%	10%
Computer Science & Programming	16%	14%	14%	13%	20%	6%
Engineering	8%	18%	9%	10%	16%	4%
Healthcare / Medicine	17%	9%	10%	10%	5%	16%
Physics	1%	1%	1%	1%	1%	1%
Vocational training i.e. plumbing, electrician, etc.	2%	2%	5%	4%	7%	2%
Communications	6%	5%	6%	7%	4%	9%
Other	15%	9%	14%	17%	13%	22%

Which is the least important?	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Economics	2%	2%	2%	2%	2%	2%
Foreign Languages	10%	2%	6%	3%	5%	2%
History	18%	18%	17%	15%	16%	14%
Literature	17%	17%	22%	28%	35%	21%
Mathematics	7%	4%	6%	7%	3%	11%
Biology/Chemistry	6%	8%	6%	6%	5%	7%
Business	2%	2%	3%	3%	4%	1%
Computer Science & Programming	1%	2%	3%	2%	1%	3%
Engineering	4%	2%	5%	5%	5%	6%
Healthcare / Medicine	3%	4%	3%	4%	3%	4%
Physics	10%	9%	6%	6%	3%	9%
Vocational training i.e. plumbing, electrician, etc.	12%	16%	9%	9%	9%	8%
Communications	3%	2%	3%	2%	3%	2%
Other	6%	10%	7%	8%	8%	8%

Looking ahead to 10 years from now, which of the following accomplishments is most important to you personally (by the year 2024)?	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Getting married	14%	5%	11%	12%	13%	11%
Having children	11%	6%	14%	16%	10%	21%
Having a stable, well-paying job	46%	39%	47%	49%	51%	46%
Owning a home	13%	19%	15%	13%	13%	12%
Started your own business	8%	26%	6%	5%	7%	2%
Other	5%	5%	5%	4%	5%	4%
Don't know	3%	1%	3%	2%	1%	3%

Which industries are you most likely to pursue in the future?	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
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Academics (Academia)	10%	9%	10%	8%	7%	8%
Advertising / Public relations	5%	5%	6%	5%	2%	8%
Agriculture	3%	2%	2%	1%	1%	2%
Civil service	6%	14%	10%	11%	10%	11%
Creative industries	11%	9%	15%	16%	12%	20%
Communications	10%	8%	10%	10%	9%	12%
Energy	4%	4%	7%	7%	11%	2%
Engineering	13%	19%	11%	12%	19%	5%
Finance	10%	11%	11%	12%	15%	9%
Government	7%	7%	7%	11%	11%	11%
Healthcare	22%	9%	13%	14%	6%	22%
Manufacturing	5%	4%	6%	8%	10%	5%
Media	11%	4%	12%	11%	10%	13%
Public Service	7%	6%	10%	11%	7%	15%
Retail / Commerce	9%	8%	13%	12%	10%	14%
Technology	25%	25%	22%	16%	26%	6%
Telecommunications	6%	8%	8%	8%	11%	4%
Tourism	6%	8%	7%	4%	3%	5%
Science	13%	7%	12%	7%	7%	7%
Start my own business	23%	30%	16%	10%	11%	9%
Other	16%	7%	14%	13%	8%	18%

Please think a little more about where you personally would want to work. If you were to apply to work for a company, please pick the three things that would be the most important elements that the company needs to demonstrate.	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Pays a lot of money	41%	27%	30%	32%	39%	25%
Helps its employees navigate their career path	18%	22%	22%	22%	22%	23%
Allows its employees a good work/life balance	49%	32%	47%	41%	31%	51%
Empowers employees to make an impact in the company	13%	11%	13%	15%	18%	12%
Allows employees to take on new professional challenges	13%	24%	15%	13%	15%	10%
Gives employees flexibility in regard to when and where to work	23%	12%	21%	22%	21%	23%
Demonstrates an entrepreneurial spirit	6%	9%	6%	6%	9%	4%
Uses the most up-to-date technology	14%	15%	11%	9%	12%	7%
Has a prestigious reputation	7%	9%	8%	9%	11%	6%
Offers ample opportunities for training and development	20%	39%	30%	26%	23%	30%
Is involved in social good/supports causes that are important to you	9%	9%	9%	8%	8%	8%



Provides opportunities to travel with work	7%	8%	7%	5%	5%	6%
Offers a fun workplace environment	22%	19%	32%	47%	46%	48%
Offers a humane, nurturing workplace environment	21%	33%	30%	32%	28%	36%
Offers opportunities to work abroad	8%	14%	8%	5%	5%	5%
Acts with integrity	29%	17%	12%	6%	7%	6%

How much do you agree or disagree with the following statement? I have opportunities in my country to become an entrepreneur or develop and bring an idea to the market	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Strongly agree	35%	20%	18%	23%	29%	17%
Somewhat agree	49%	47%	49%	57%	54%	60%
Somewhat disagree	13%	25%	23%	16%	13%	20%
Strongly disagree	3%	9%	10%	4%	4%	3%

How interested are you in seeking employment opportunities abroad?	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Very interested	28%	49%	23%	16%	16%	17%
Somewhat interested	38%	32%	38%	35%	42%	28%
Not very interested	22%	14%	27%	33%	30%	36%
Not at all interested	12%	5%	12%	16%	12%	20%

Which regions are you personally most interested in to seek employment opportunities abroad?	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Africa	8%	3%	6%	3%	5%	1%
Asia	32%	12%	20%	23%	23%	23%
Eastern Europe	34%	23%	16%	8%	11%	4%
Latin America	15%	29%	11%	9%	8%	12%
Middle East	10%	5%	8%	6%	5%	6%
North America	46%	57%	49%	49%	52%	45%
Western Europe	49%	47%	54%	48%	46%	51%
Australia	31%	18%	30%	28%	28%	27%

Which of the following skills do you consider most important to getting a decent paying job in your country? Please select the top 3 most important	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany

choices.						
Blogging	8%	7%	7%	6%	6%	6%
Cloud technology	13%	17%	13%	11%	14%	7%
Coding / Programming (e.g. CSS, jQuery, HTML)	37%	36%	35%	36%	37%	35%
Financial Modeling	20%	22%	24%	28%	29%	27%
Graphic design	21%	30%	21%	20%	21%	20%
Google applications (e.g. Google Docs)	17%	17%	14%	14%	11%	17%
Microsoft Office (Word, Excel, PowerPoint, Access, Outlook)	55%	54%	60%	62%	56%	67%
Photo Editing (Photoshop)	8%	11%	11%	13%	13%	13%
Website design	24%	30%	25%	18%	23%	14%
Web analytics	20%	16%	16%	17%	18%	17%
Social media (e.g. LinkedIn, Twitter)	25%	19%	24%	22%	20%	24%
Typing speed	36%	21%	26%	25%	22%	29%
Video Editing	8%	11%	9%	9%	15%	4%
Other	8%	10%	15%	18%	16%	21%

## TECHNOLOGY

How much do you agree or disagree with the following statement? I am on the cutting edge of technology	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Strongly agree	32%	33%	26%	25%	35%	15%
Somewhat agree	51%	51%	54%	54%	53%	56%
Somewhat disagree	14%	11%	17%	19%	11%	27%
Strongly disagree	3%	4%	2%	2%	1%	2%

Which of the following technological devices do you own?	USA	Latin America	Westeuropa	Deutschland	Männliche Millennials in Deutschland	Weibliche Millennials in Deutschland
Desktop Computer	54%	54%	51%	53%	63%	44%
Laptop Computer	86%	66%	79%	79%	77%	82%
Tablet	56%	35%	56%	35%	36%	34%
Smartphone	79%	74%	84%	83%	81%	85%
'Feature phone (e.g. flip phone, texting phone, etc.)'	37%	60%	28%	25%	25%	25%
Video Game console	73%	40%	61%	58%	65%	50%
Smart TV that can be connected to Internet by cable or WiFi	31%	33%	33%	35%	39%	30%
'Wearable devices (smart watch, fitness band, etc.)'	19%	28%	16%	11%	14%	8%

For which of the following activities did you use your personal mobile technology (tablet/ smartphone) today?*	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany

Look for a new job or career opportunities	21%	25%	12%	7%	8%	4%
Access a social network	67%	70%	60%	57%	54%	58%
Post an update, video or photo to a social network	34%	44%	24%	16%	19%	14%
Make a telephone call (voice only)	55%	59%	42%	39%	36%	42%
Send a text message	64%	60%	52%	54%	56%	54%
Find a date	15%	16%	14%	18%	19%	15%
Watch a video posted online	51%	51%	35%	28%	32%	25%
Stream video content through a service such as iTunes, Netflix, Amazon, HBO Go, etc.	31%	22%	14%	11%	14%	7%
Make a financial transaction (payment, deposit, money transfer)	22%	19%	15%	13%	15%	11%
Read the news	43%	54%	50%	60%	63%	58%
Take a photo or video	39%	41%	31%	26%	27%	27%
Play a video game	36%	33%	27%	21%	30%	14%
Shop	27%	17%	14%	11%	13%	8%
Order a taxi	7%	11%	6%	3%	5%	2%
Find directions	19%	24%	13%	12%	12%	11%
Connect to another physical item (thermostat, car, fitness band, etc.)	17%	18%	11%	10%	11%	7%

Thinking about how personal mobile technology has transformed your life to date, how would you characterize the impact that personal mobile technology has had on each area of your life*:	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Medicine and healthcare	63%	68%	51%	51%	49%	51%
Education and research	83%	91%	74%	73%	75%	70%
Finding a job / career opportunities	76%	80%	66%	62%	63%	61%
Entertainment	88%	93%	86%	85%	85%	85%
Personal banking / making payments	80%	70%	66%	59%	59%	60%
Access to news / current events	86%	90%	83%	82%	85%	81%
Personal expression	84%	82%	72%	70%	71%	69%
Social life (with friends)	86%	89%	85%	83%	86%	82%
Romantic life	61%	71%	57%	55%	57%	53%
Political expression	60%	65%	54%	54%	60%	47%
Retail / commerce (e.g. purchasing goods and services)	82%	72%	70%	71%	70%	71%
Travel	71%	69%	67%	61%	63%	59%
Creativity (e.g. making art, pictures, music, videos)	82%	88%	75%	73%	72%	75%

Work / business productivity	73%	77%	63%	63%	66%	60%
Local transportation	61%	62%	60%	53%	60%	47%
Personal safety	70%	63%	59%	56%	57%	57%

**DATA PROTECTION AND PRIVACY**

How strongly do you agree or disagree with the following statement? Overall, I am concerned about the security and privacy of my data and information online	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Strongly agree	38%	57%	36%	36%	36%	35%
Somewhat agree	50%	34%	49%	49%	46%	51%
Somewhat disagree	11%	6%	13%	13%	14%	12%
Strongly disagree	1%	3%	2%	2%	3%	2%

How strongly do you agree with the following statements? I am worried about getting hacked / someone stealing my information online	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Strongly agree	35%	54%	30%	29%	26%	31%
Somewhat agree	44%	30%	44%	43%	40%	46%
Somewhat disagree	17%	9%	20%	22%	26%	19%
Strongly disagree	5%	7%	5%	6%	8%	4%

How strongly do you agree with the following statements? I actively take steps to protect my online security	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Strongly agree	43%	55%	29%	24%	24%	23%
Somewhat agree	47%	34%	51%	51%	51%	51%
Somewhat disagree	9%	9%	16%	22%	22%	22%
Strongly disagree	1%	3%	3%	3%	3%	4%

How strongly do you agree with the following statements? New technology such as data and its collection and use should be regulated by the government	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Strongly agree	20%	26%	21%	16%	17%	14%
Somewhat agree	39%	33%	47%	49%	46%	53%
Somewhat disagree	23%	21%	21%	22%	20%	23%
Strongly disagree	17%	20%	11%	13%	17%	10%

How strongly do you agree with the following statements? I am in control of my personal data	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
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Strongly agree	36%	45%	19%	14%	16%	13%
Somewhat agree	48%	37%	46%	45%	41%	48%
Somewhat disagree	12%	12%	26%	31%	30%	32%
Strongly disagree	4%	6%	9%	10%	13%	7%

How strongly do you agree with the following statements? I fully understand what types of personal information and data that companies collect and store about me	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Strongly agree	33%	40%	18%	13%	14%	11%
Somewhat agree	45%	39%	45%	44%	48%	40%
Somewhat disagree	18%	15%	26%	29%	25%	34%
Strongly disagree	5%	6%	10%	14%	13%	15%

When it comes to the Internet, which of the following do you value most?	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
My freedom to access any content of my choice	31%	20%	23%	21%	20%	23%
That my privacy is fully respected	28%	34%	34%	39%	34%	44%
The quality / speed of my broadband connection	24%	29%	24%	22%	27%	17%
That governments do not interfere with or censor the Internet	18%	17%	19%	18%	20%	17%

## EXPECTATIONS OF THE FUTURE

Overall, how satisfied are you with your life?	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Very satisfied with my life	34%	47%	23%	24%	27%	21%
Somewhat satisfied with my life	52%	43%	60%	62%	61%	62%
Not very satisfied with my life	11%	9%	15%	13%	12%	14%
Not at all satisfied with my life	3%	1%	3%	1%	0%	3%

How optimistic are you about your future?	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Very optimistic	43%	62%	22%	22%	25%	20%
Somewhat optimistic	46%	34%	58%	59%	62%	57%
Somewhat pessimistic	9%	4%	16%	16%	12%	20%
Very pessimistic	2%	1%	3%	2%	1%	4%

In general, do you think your country's best days are	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in
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ahead, or behind?						Germany
My country's best days are ahead	51%	72%	50%	58%	63%	54%
My country's best days are behind	49%	28%	50%	42%	37%	46%

In your opinion, which of the following region(s) will be the biggest growth driver(s) for the global economy in the next 10 years? Please select all that apply.	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
North America	44%	40%	25%	21%	19%	23%
Latin America	9%	36%	10%	9%	14%	5%
Western Europe	26%	25%	28%	31%	32%	29%
Eastern Europe	21%	19%	13%	13%	13%	13%
Eastern Asia	38%	33%	35%	36%	37%	34%
South / Southeast Asia	27%	17%	26%	36%	35%	37%
Central Asia / Middle East	22%	21%	24%	23%	20%	25%
Africa	5%	3%	5%	5%	6%	4%

What characteristics make your country poised for growth? Please select all that apply.	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Social and religious tolerance	20%	16%	20%	26%	25%	28%
Ability to foster entrepreneurship	21%	22%	18%	24%	24%	23%
Strong education system	28%	27%	27%	31%	29%	33%
Equality between men and women	24%	22%	22%	23%	21%	25%
Foreign trade	17%	24%	29%	40%	48%	31%
A more productive workforce	24%	25%	21%	28%	27%	28%
Political leadership	18%	19%	15%	19%	19%	19%
Economic equality	21%	18%	16%	15%	18%	13%
Equal opportunities for all	32%	27%	25%	25%	22%	28%
Natural resources	20%	36%	10%	9%	9%	9%
Naturally talented citizens	19%	22%	15%	14%	16%	11%
Low crime	15%	21%	15%	19%	22%	16%
Solid infrastructure	16%	14%	29%	47%	48%	46%
Ability to move between social classes	22%	15%	14%	18%	16%	19%
Lack of corruption	19%	16%	18%	20%	23%	17%
Other	4%	4%	3%	4%	4%	4%
I do not believe my country is poised for growth	15%	15%	18%	10%	7%	13%

In your opinion, what is the most important issue facing your country today?	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Education	7%	10%	6%	8%	7%	9%

Gender inequality	1%	1%	1%	1%	.%	2%
Healthcare	5%	3%	3%	2%	2%	2%
Political freedom	1%	1%	1%	2%	3%	1%
Political unrest/instability	4%	3%	4%	3%	3%	4%
Poverty	5%	7%	6%	7%	7%	7%
Racial inequality	2%	.%	1%	1%	1%	2%
Religious freedom	2%	.%	1%	1%	2%	.%
Social inequality	6%	8%	17%	28%	27%	28%
The economy	26%	7%	11%	5%	5%	6%
The environment	2%	1%	3%	6%	5%	6%
Corruption	11%	32%	10%	3%	4%	2%
Crime	5%	14%	3%	3%	2%	4%
Public services	1%	2%	1%	.%	0%	.%
Unemployment	12%	7%	20%	11%	9%	13%
Lack of infrastructure	1%	2%	2%	2%	4%	1%
Corporate greed	7%	2%	7%	12%	15%	9%
Other	3%	1%	4%	4%	5%	4%

In your opinion, what aspects of your country's infrastructure should your government focus on improving? Please select the top TWO you believe are most important.	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Public transportation	8%	15%	9%	9%	10%	9%
Public health system facilities such as hospitals	31%	35%	31%	18%	12%	25%
Public parks, recreation facilities and green spaces	6%	4%	6%	6%	6%	6%
Reliable electricity	6%	4%	7%	9%	11%	8%
Natural resources and recycling	20%	12%	12%	13%	13%	13%
Public roads & highways	10%	9%	8%	11%	14%	8%
Police & firefighters	5%	12%	7%	6%	6%	5%
Military	9%	5%	4%	5%	8%	2%
Education system	57%	67%	52%	56%	52%	61%
Port infrastructure	3%	4%	2%	3%	3%	2%
Broadband Internet access	6%	4%	8%	11%	17%	4%
Safe, affordable housing	28%	26%	42%	43%	41%	44%
Other	4%	3%	3%	2%	2%	2%
Don't know	4%	1%	4%	4%	3%	5%

Which of the following are the most important environmental and social issues facing the world today? Please pick the top 3 most important issues.	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
The economy	38%	21%	19%	12%	14%	10%
Healthcare	27%	16%	17%	13%	11%	14%
Political unrest/instability	18%	10%	26%	33%	31%	35%



War	23%	24%	30%	35%	33%	36%
Political freedom	7%	6%	10%	12%	14%	10%
Religious freedom	14%	6%	9%	9%	10%	8%
Social inequality	17%	26%	26%	31%	28%	34%
Gender inequality	12%	6%	9%	8%	7%	9%
Racial inequality	10%	9%	11%	11%	12%	11%
The environment	20%	30%	26%	30%	31%	29%
Education	28%	29%	19%	20%	20%	20%
Poverty	35%	51%	42%	40%	34%	45%
Terrorism	24%	17%	30%	29%	31%	27%
Corruption	27%	48%	26%	18%	24%	13%

Do you think that the gap between the rich and the poor in your country is...?	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Expanding	77%	64%	82%	86%	87%	85%
Shrinking	13%	27%	9%	6%	6%	6%
Don't know	10%	9%	9%	8%	7%	8%

Of the following, which three have been the most influential in shaping your outlook on life to date?	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Family	75%	79%	77%	79%	69%	89%
Friends	54%	42%	62%	63%	60%	67%
Government	7%	7%	8%	6%	7%	6%
School/education	47%	59%	57%	67%	59%	74%
Media	15%	8%	18%	19%	18%	20%
Technology	35%	31%	27%	22%	36%	8%
Economy	24%	24%	16%	8%	11%	5%
Religion	25%	30%	9%	7%	6%	9%
Sports	11%	15%	19%	21%	30%	12%
Other	6%	5%	8%	7%	5%	10%

### GERMAN MILLENNIALS AND LATIN AMERICA

In your opinion, which of the following region(s) will lead the world in technology and innovation in the next 10 years? Please select all that apply.	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
North America	60%	48%	35%	33%	35%	31%
Latin America	4%	20%	4%	5%	6%	4%
Western Europe	19%	25%	30%	35%	41%	29%
Eastern Europe	13%	16%	9%	8%	9%	8%
Eastern Asia	39%	39%	39%	40%	41%	40%
South / Southeast Asia	27%	19%	25%	33%	32%	34%

Central Asia / Middle East	16%	25%	20%	17%	16%	18%
Africa	4%	3%	4%	3%	2%	4%

In your opinion, which of the following region(s) will be the biggest growth driver(s) for the global economy in the next 10 years? Please select all that apply.	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
North America	44%	40%	25%	21%	19%	23%
Latin America	9%	36%	10%	9%	14%	5%
Western Europe	26%	25%	28%	31%	32%	29%
Eastern Europe	21%	19%	13%	13%	13%	13%
Eastern Asia	38%	33%	35%	36%	37%	34%
South / Southeast Asia	27%	17%	26%	36%	35%	37%
Central Asia / Middle East	22%	21%	24%	23%	20%	25%
Africa	5%	3%	5%	5%	6%	4%

Which regions are you personally most interested in to seek employment opportunities abroad?	USA	Latin America	Western Europe	Germany	Male Millennials in Germany	Female Millennials in Germany
Africa	8%	3%	6%	3%	5%	1%
Asia	32%	12%	20%	23%	23%	23%
Eastern Europe	34%	23%	16%	8%	11%	4%
Latin America	15%	29%	11%	9%	8%	12%
Middle East	10%	5%	8%	6%	5%	6%
North America	46%	57%	49%	49%	52%	45%
Western Europe	49%	47%	54%	48%	46%	51%
Australia	31%	18%	30%	28%	28%	27%

\* This data is the accumulated value of the first two replies.

g73 = "Within the last hour" + "Earlier today"

g96 = "Significantly transformed this area of my life" + "Slightly transformed this area of my live"