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**Telefónica Global
Millennial Survey:
Global Results**

13.10.2014

Methodology

Telefónica commissioned 6,702 quantitative interviews among Millennials, aged 18-30, across 18 countries in three regions. Penn Schoen Berland conducted research from 23 June – 4 August 2014 via online survey and central recruit to online survey.

Country sample sizes are weighted to gender, age, and the percent of the population in each country with access to the internet. The US Hispanic and US Non-Hispanic populations are weighted to census.



Region	Sample size	MOE
United States	1,000	± 3.1

Region	Sample size	MOE
Latin America	4,201	± 1.5

Region	Sample size	MOE
Western Europe	1,501	± 2.5

Please note, questions in which answer choices are mutually exclusive and all answer choices are displayed, percentages may not add up to exactly 100% due to rounding. All of the results, unless otherwise indicated, are shown in percentages. In some instances, select answers are shown. Exact sample composition is not identical wave over wave and demographics can vary. Trend may be somewhat affected by these variations.

Region /Country		Sample size	MOE
US	United States	1,000	± 3.1
Western Europe	Spain	500	± 4.4
	UK	501	± 4.4
	Germany	500	± 4.4
Latin America	Mexico	501	± 4.4
	Brazil	500	± 4.4
	Argentina	500	± 4.4
	Chile	500	± 4.4
	Peru	300	± 5.7
	Venezuela	250	± 6.2
	Colombia	300	± 5.7
	Ecuador	300	± 5.7
	Uruguay	300	± 5.7
	Panama	150	± 8.0
	Costa Rica	150	± 8.0
	Nicaragua	150	± 8.0
	Guatemala	150	± 8.0
	El Salvador	150	± 8.0
TOTAL		6,702	± 1.2



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Introduction

Comprehensive, global insights into adult Millennials building upon last year's study which was the largest ever conducted

Key Themes

1 The “Latin American Dream”

2 Culture Counts

3 The “Free Agent” Generation

4 Economic Worries Affect All...

5 ...And Education Is Also a Major Concern

6 Technology: Pervasive and Transformational

7 Race To Be Next “Global Technology Leader”

8 Consideration For Those With Disabilities

A woman with long, wavy brown hair is smiling and looking down at a smartphone she is holding in her hands. She is wearing a white top. The background is a soft-focus outdoor scene with greenery and a body of water under a bright sky.

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Section 1_
The “Latin American
Dream”

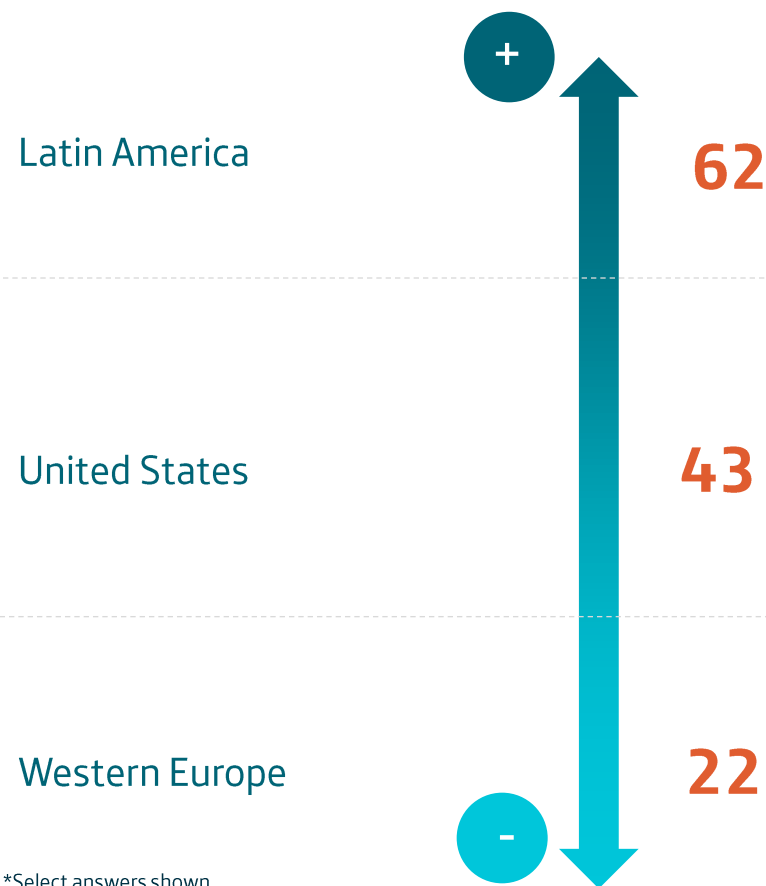
Latin American Millennials are more satisfied with life than peers in other regions

Satisfaction With Life

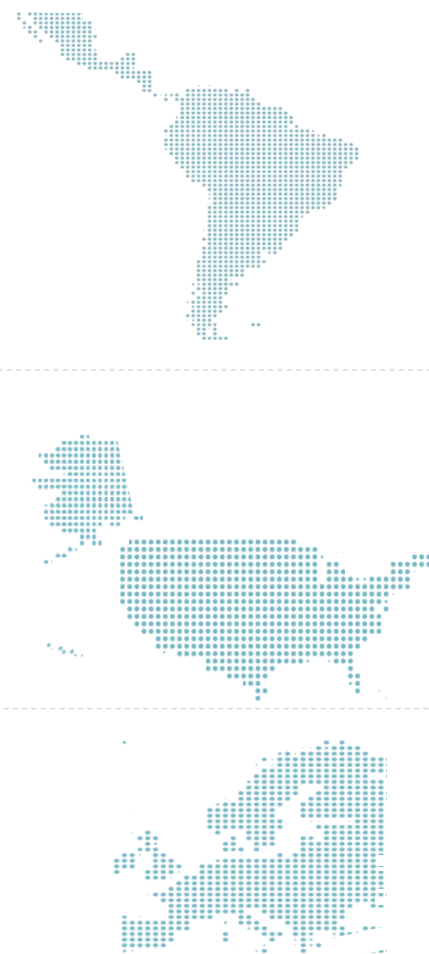


Latin American Millennials are more optimistic about the future than their counterparts

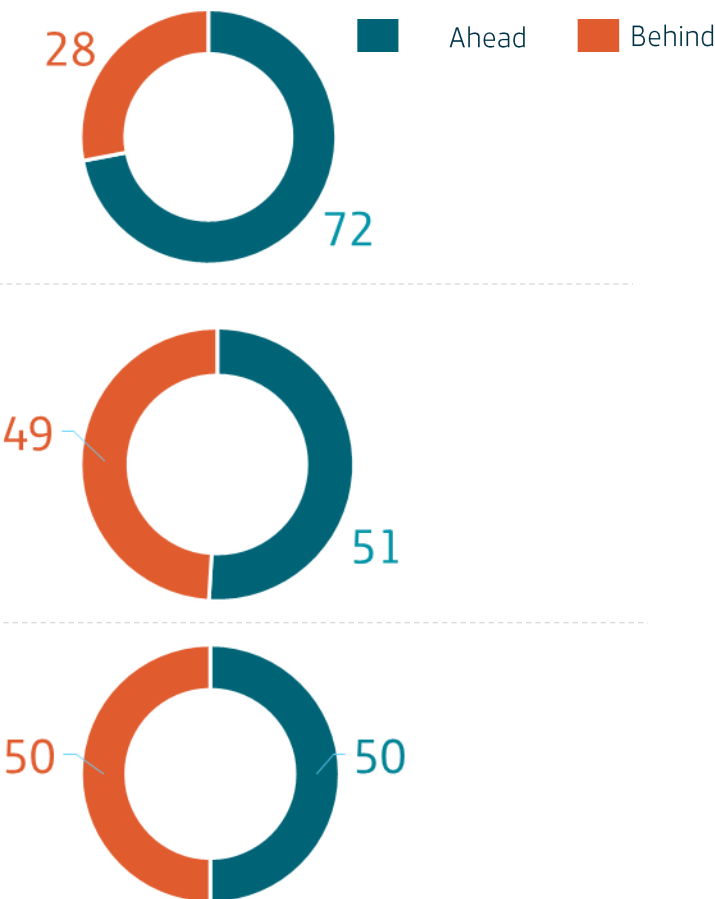
Optimism About Future: “Very Optimistic”



*Select answers shown

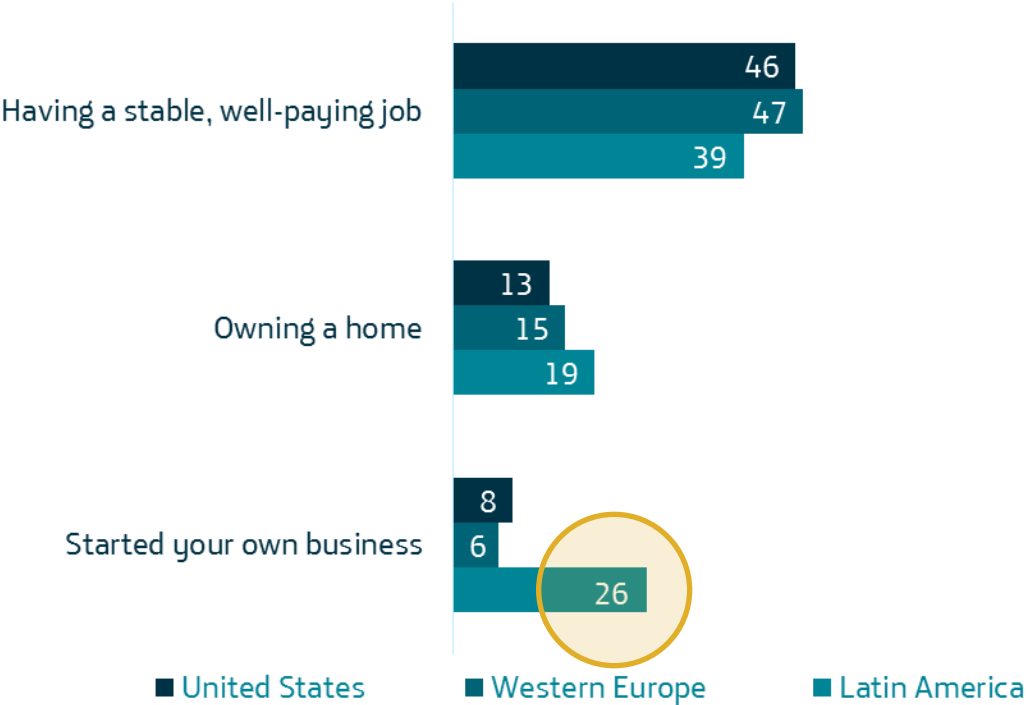


“My Country’s Best Days Are...”



Entrepreneurial spirit is strongest in Latin America

Priority Personal Accomplishments to Achieve by 2024



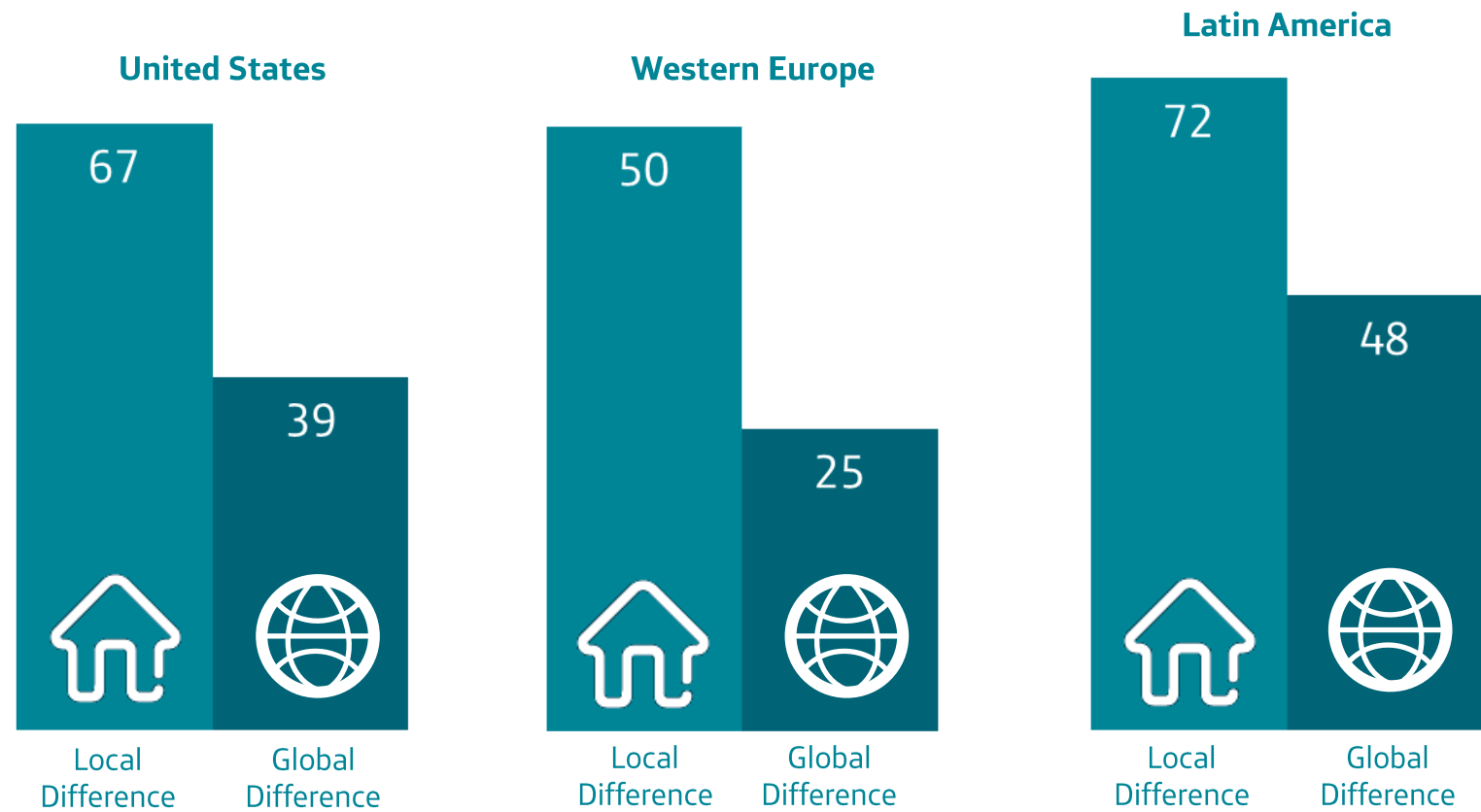
Industries Most Likely to Pursue: Start My Own Business



*Select answers shown

Latin American Millennials more likely to believe they can make a difference – locally and globally

“I believe I can make a...”



*Select answers shown

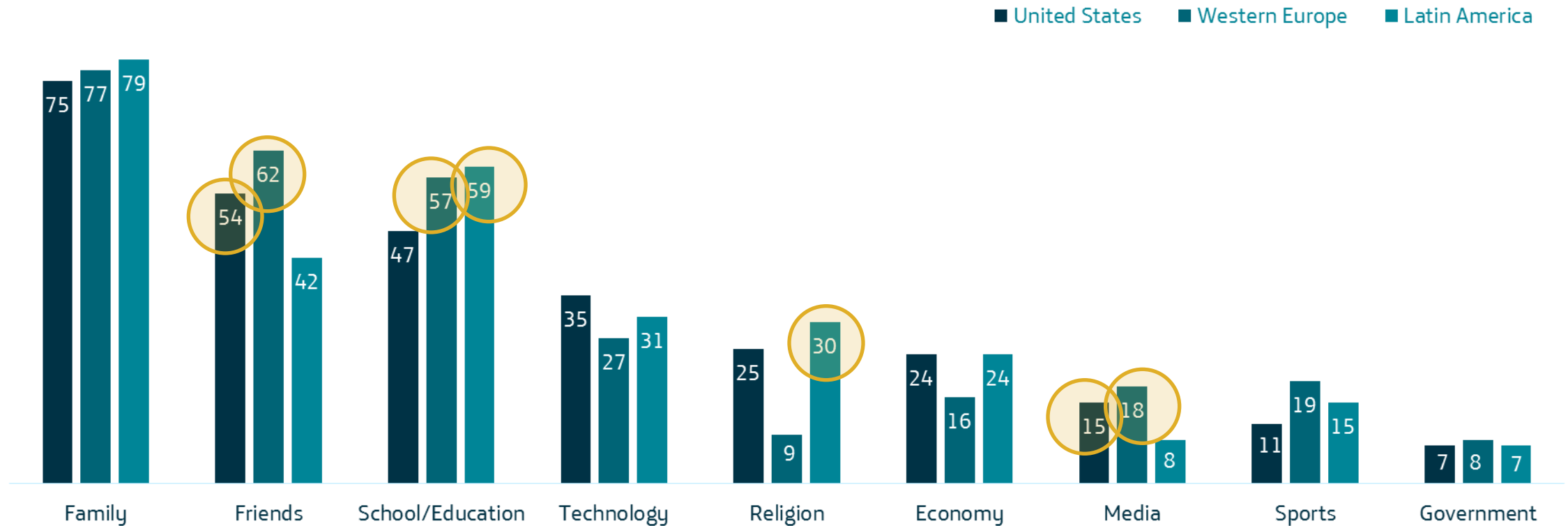


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Section 2_
Culture Counts

The top influence is family - others vary regionally: in US and Western Europe, *Friends* and *Media* are stronger, while in Latin America *Religion* and *Education* are more influential

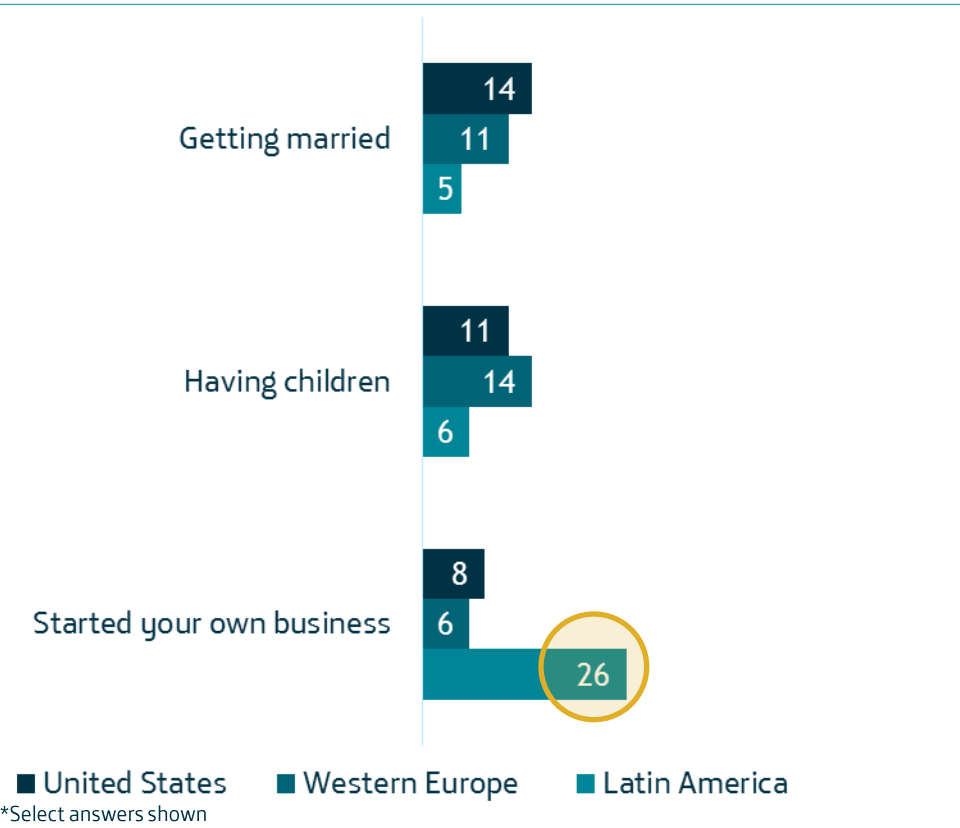
Most Influential in Shaping Outlook on Life



*Select answers shown

US and European Millennials place a greater emphasis on personal goals, while Latin America is more focused on professional growth

Priority Personal Accomplishments to Achieve by 2024



Most Important Workplace Qualities

		United States	Western Europe	Latin America
Personal	Allows its employees a good work/life balance	49	47	32
	Pays a lot of money	41	30	27
	Offers a fun workplace environment	22	32	19
Professional	Offers ample opportunities for training and development	20	30	39
	Allows employees to take on new professional challenges	13	15	24

Next generation leadership more likely to come from the US and Latin America



For the second year, we have identified a key subgroup in the Millennial generation. Instead of traditional metrics like socioeconomic status, Millennial Leaders are defined by **technology** and **opportunity**.

Who Are The Millennial Leaders? Millennials Who...

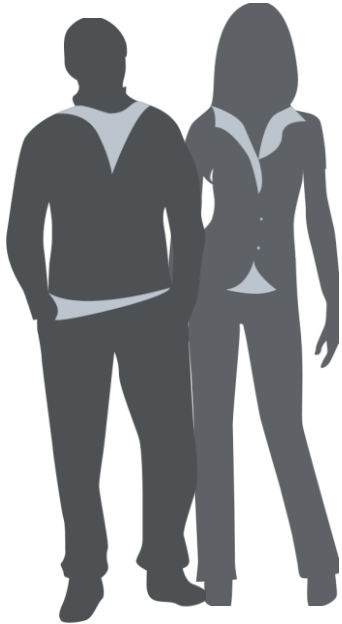
- ✓ Strongly Agree “**I am on the cutting-edge of technology**”
- ✓ Believe “**I can make a local difference**”
- ✓ Strongly/Somewhat Agree “**I have opportunities in my country to become an entrepreneur or develop and bring an idea to market**”

% Millennial Leaders

■ United States ■ Western Europe ■ Latin America



Millennial Leaders: Where are they in the world?



TOP 10	
COUNTRY	% MILLENNIAL LEADERS
Panama	38
Peru	33
Ecuador	27
Nicaragua	24
Colombia	24
Guatemala	23
United States	22
Mexico	20
Costa Rica	18
Chile	18



BOTTOM 8	
COUNTRY	% MILLENNIAL LEADERS
Brazil	17
Venezuela	14
Argentina	13
United Kingdom	13
El Salvador	12
Germany	11
Uruguay	10
Spain	8



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Section 3_

The “Free Agent” Generation

Millennials will look abroad if opportunities are lacking at home

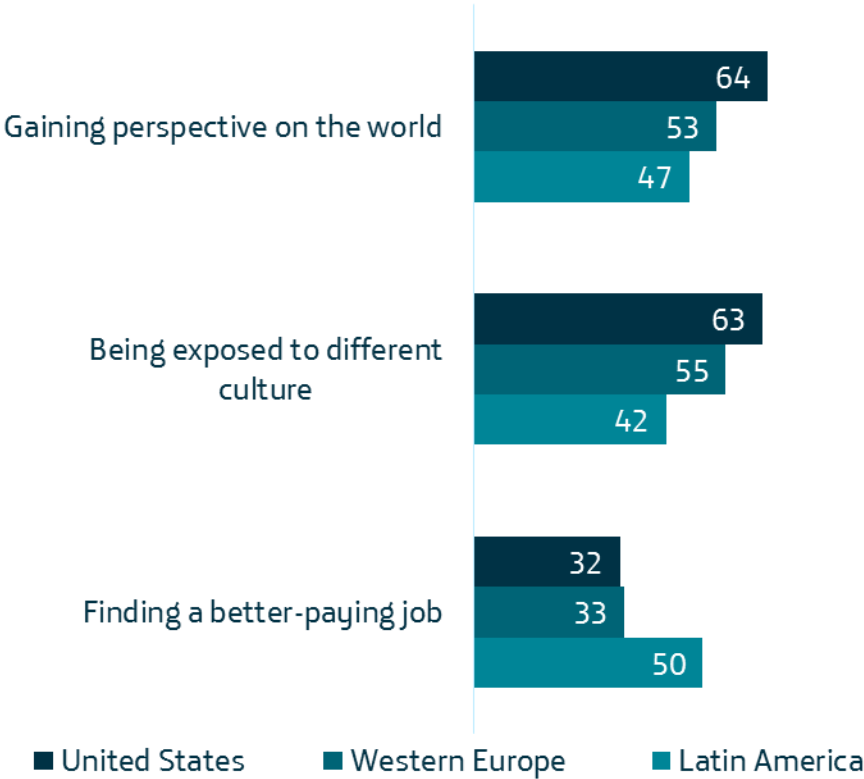
Millennials Interested in Working Abroad



*Select answers shown

Top benefits of working abroad vary by region, with those in the US and Western Europe more focused on perspective and exposure to culture, and those in Latin America on better pay

Top Benefits of Working Abroad



*Select answers shown

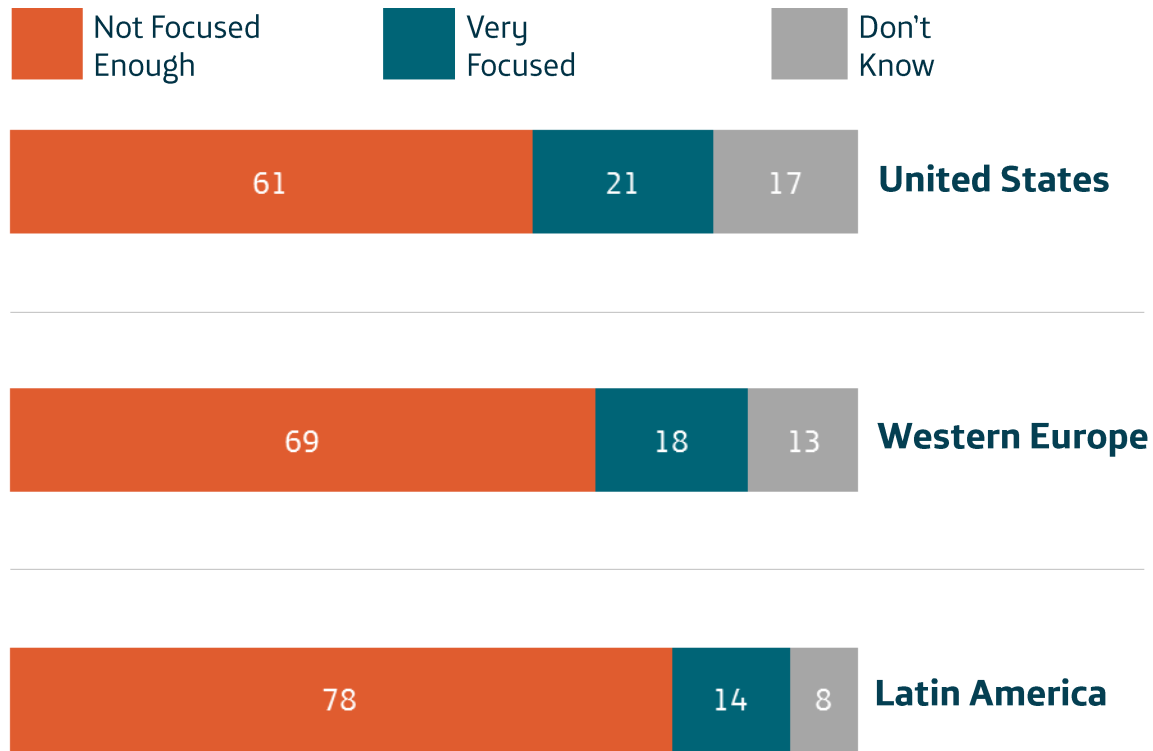
Millennials are concerned about “brain drain” and worried that their governments are not doing enough to develop and retain youth talent

Concerned About “Brain Drain”



*Select answers shown

Developing and Retaining Youth Talent: My country’s leaders are....



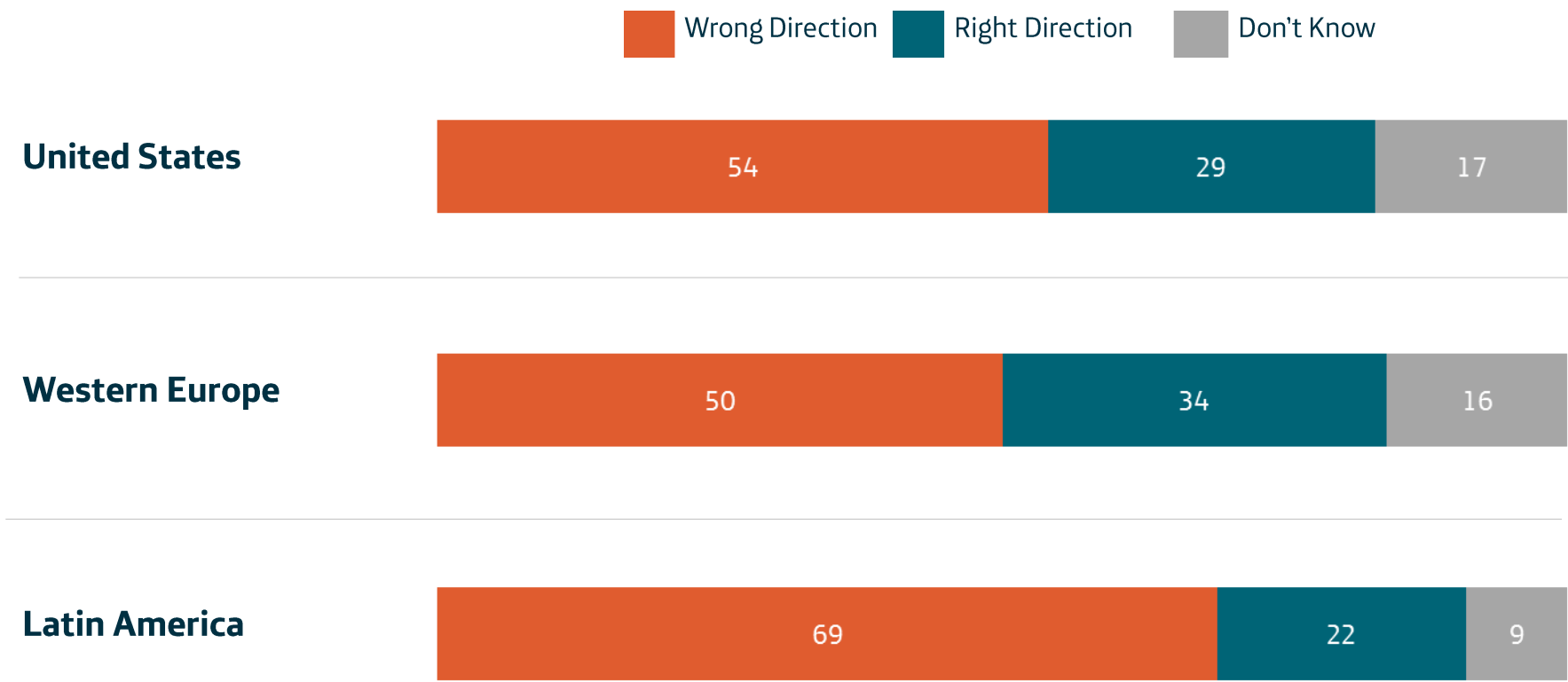
A close-up portrait of a man with dark hair and eyes, looking directly at the camera. His face is partially obscured by a white grid pattern that represents a world map. The map shows the outlines of continents and is overlaid with a grid of latitude and longitude lines. The background is a soft, out-of-focus grey.

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Section 4_
Economic Worries Affect
All...

There is concern that in the short-term the economy is headed in the wrong direction

The Economy in Your Country Is Headed...



Economy and unemployment are top concerns in the US and Europe, corruption and crime in Latin America; Poverty is seen as a major issue facing the world

Most Important Issue Facing Your Country

	United States	Western Europe	Latin America
The economy	26	11	7
Unemployment	12	20	7
Corruption	11	10	32
Inequality (social + racial + gender)	9	19	9
Education	7	6	10
Crime	5	3	14

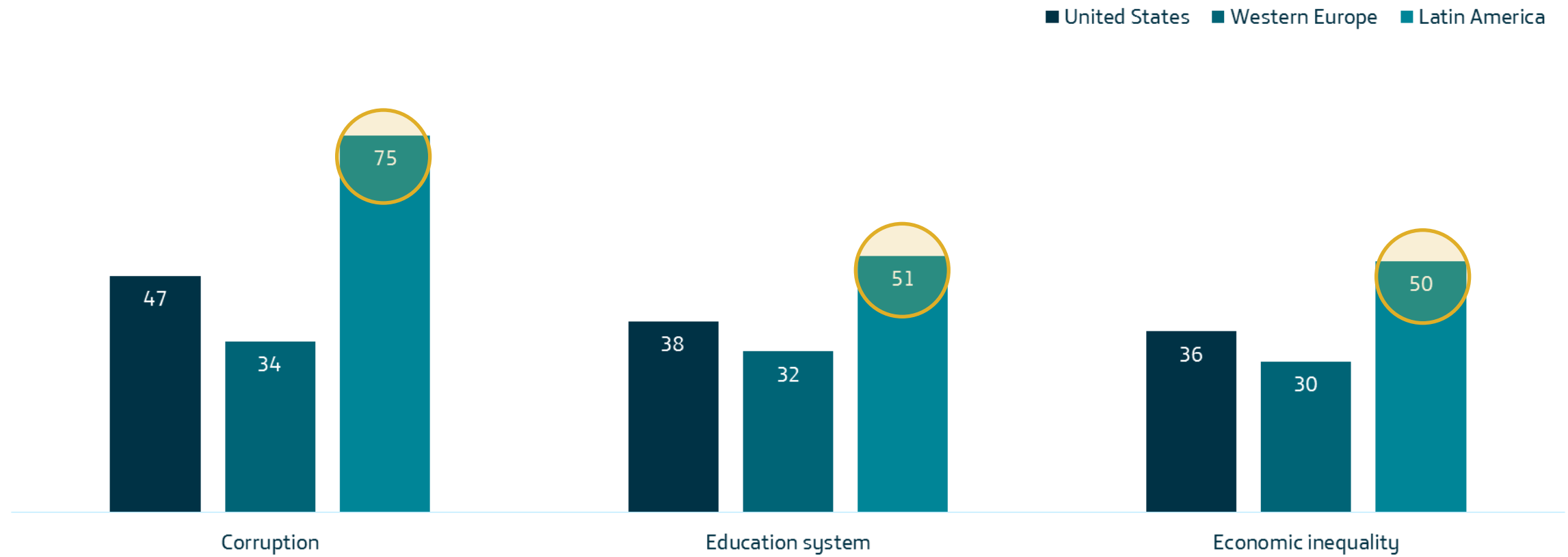
*Select answers shown

Most Important Issues Facing the World

	United States	Western Europe	Latin America
The economy	38	19	21
Poverty	35	42	51
Education	28	19	29
Corruption	27	26	48
Healthcare	27	17	16
Terrorism	24	30	17
War	23	30	24
The environment	20	26	30
Political unrest/instability	18	26	10
Social inequality	17	26	26

Latin American Millennials see education, corruption, and economic inequality as hindering country's growth

Barriers to Growth



*Select answers shown

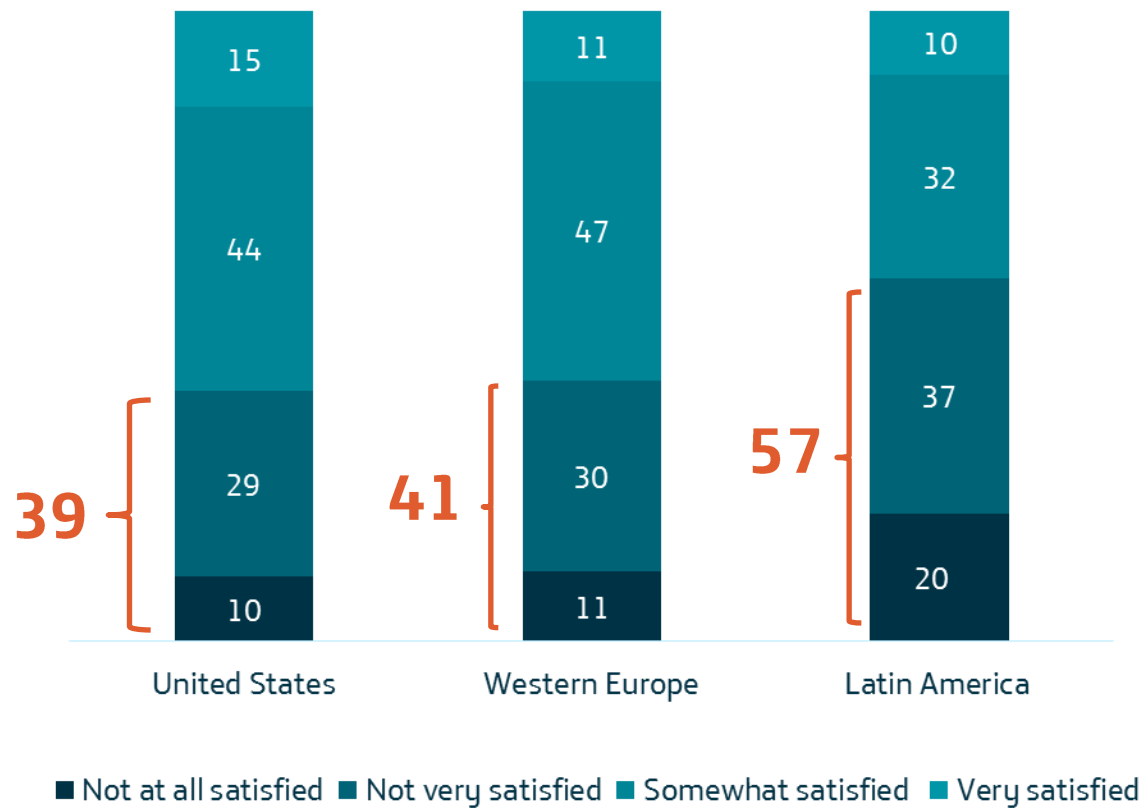


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Section 5 _
...And Education Is Also a
Major Concern

Many are dissatisfied with the education system, particularly in Latin America

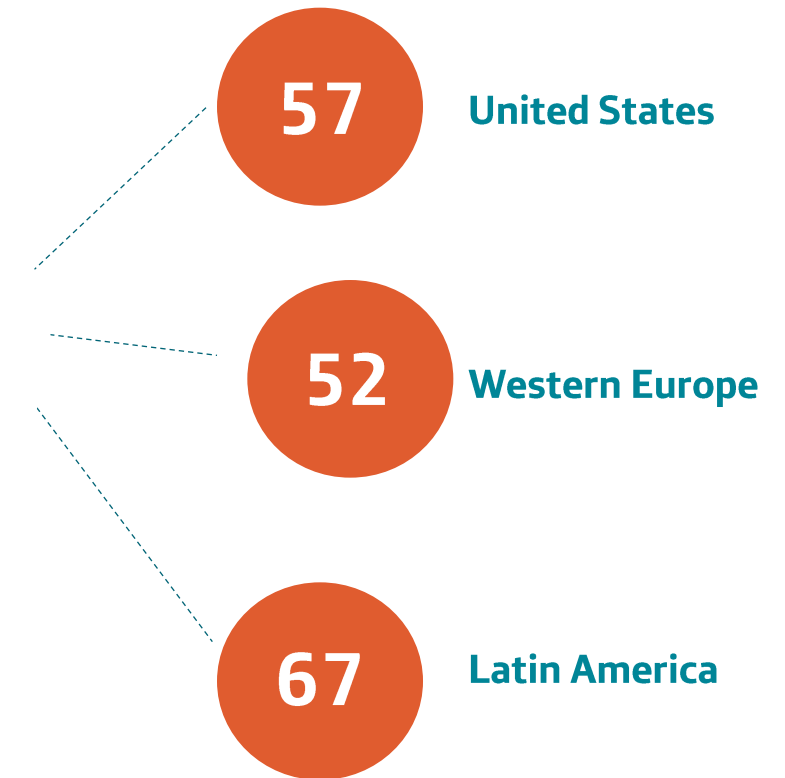
Satisfaction With Education System



*Select answers shown

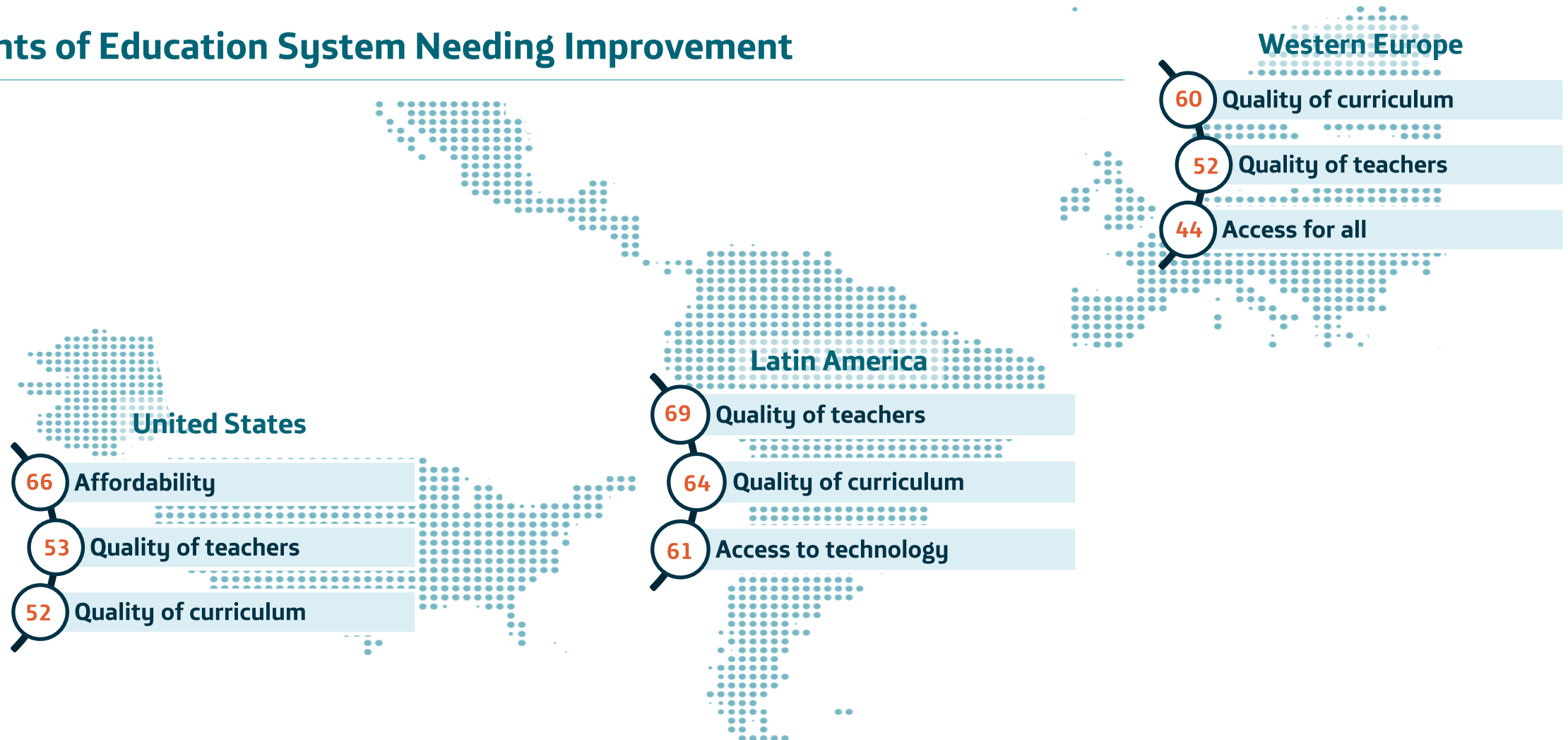
Infrastructure Improvement

% Saying government should focus on improving Education System



Western Europe and Latin America cite quality as biggest issues, while United States is more focused on affordability

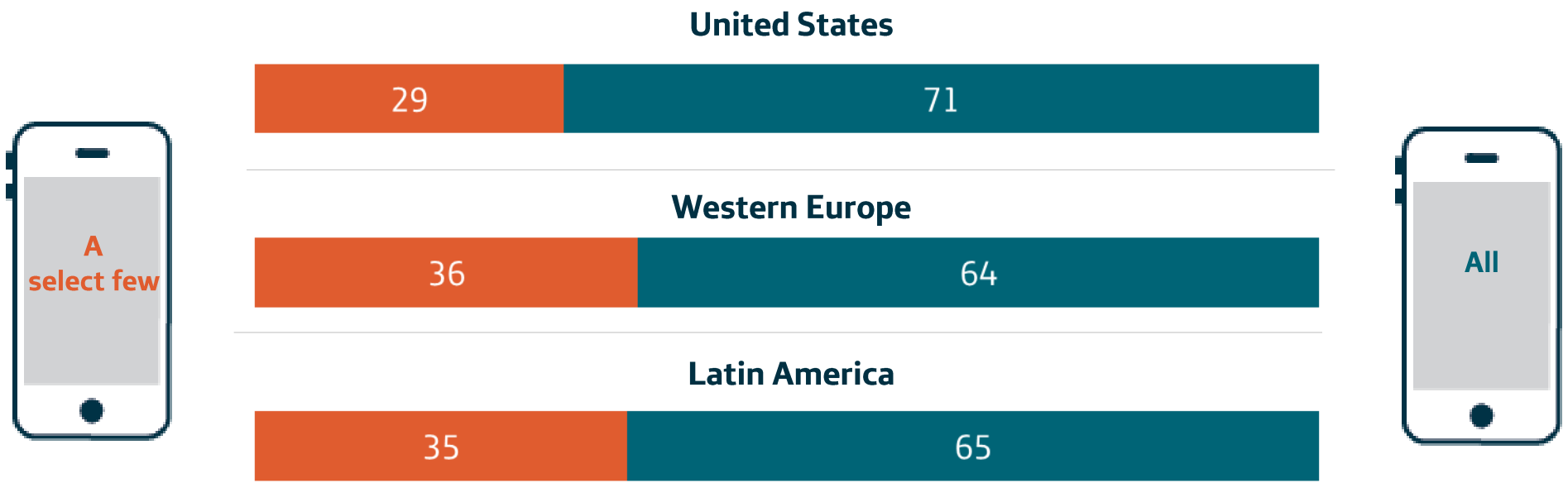
Elements of Education System Needing Improvement



*Select answers shown

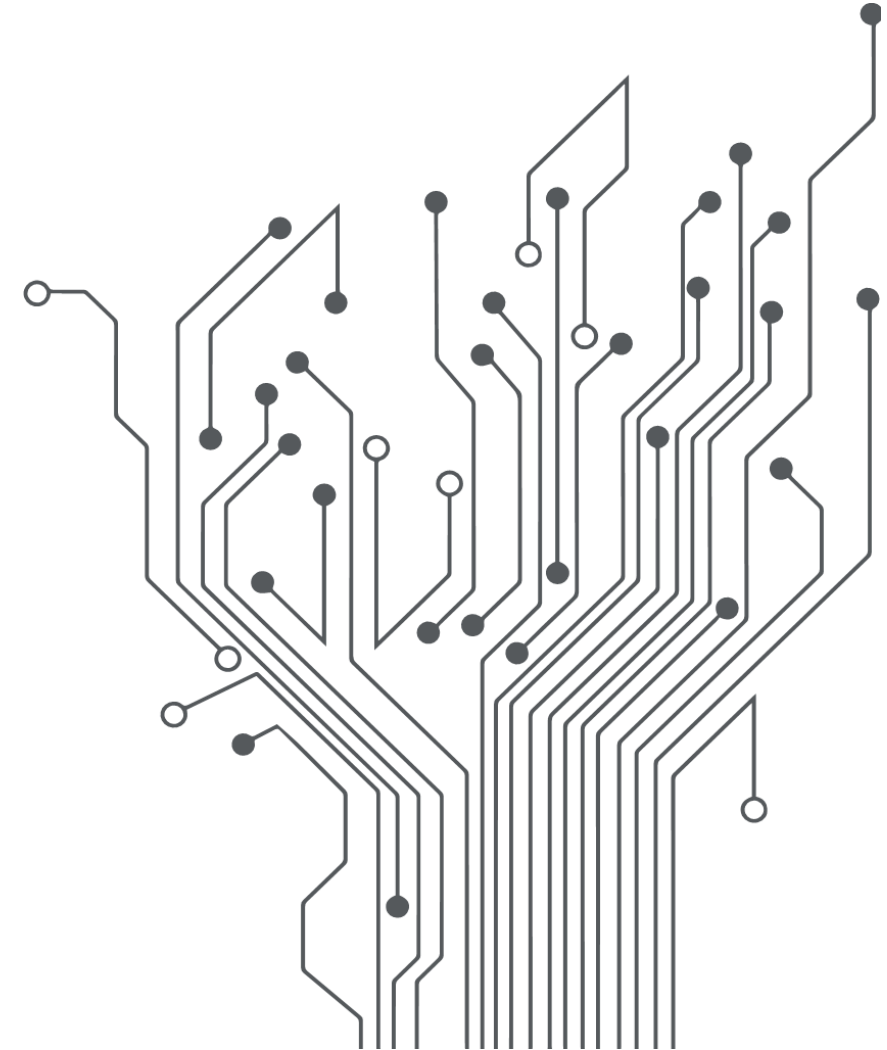
When it comes to improving access to education, technology is part of the solution

“Technology has expanded access to education for...”



Millennials believe studying healthcare, STEM fields, and business is important in order to ensure future success

	United States	Western Europe	Latin America
Healthcare / Medicine	17	10	9
Computer Science & Programming	16	14	14
Business	14	10	10
Engineering	8	9	18
Communications	6	6	5
Mathematics	5	5	4
Biology/Chemistry	5	5	3
Economics	3	7	8
Foreign Languages	3	11	14
Literature	3	2	1
History	2	2	1
Vocational training i.e. plumbing, electrician, etc.	2	5	2
Physics	1	1	1
Other	15	14	9



A close-up photograph of a person's hand touching the screen of a tablet. The person is wearing a blue long-sleeved shirt and grey trousers. The tablet is held at an angle, and the screen is dark. The background is a light-colored wooden surface.

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Section 6_
Technology: Pervasive and
Transformational

Most Millennials own a mobile device and ownership of smartphones and tablets has increased across regions compared to 2013*

Globally, **78%** say “I own a smartphone”

United States

Western Europe

Latin America



	2013	2014
Smartphone	70	79
Tablet	37	56
Laptop	82	86
Desktop	49	54

	2013	2014
Smartphone	82	84
Tablet	24	40
Laptop	76	79
Desktop	50	51

	2013	2014
Smartphone	68	78
Tablet	22	37
Laptop	62	70
Desktop	58	57

*Select answers shown

*This comparison is among owners in countries surveyed in both 2013 and 2014

...And they are using it constantly

Activities Millennials Have Done Today Using Mobile Technology

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

*Select answers shown



Mobile technology is not just for entertainment and fun

Areas of Life Mobile Technology Has “Significantly Transformed”

	United States	Western Europe	Latin America
Entertainment	58	49	64
Social life (with friends)	51	45	56
Access to news / current events	47	49	59
Education and research	46	31	62
Personal banking / making payments	44	32	38
Personal expression	43	25	45
Creativity (e.g. making art, pictures)	40	34	55
Retail / commerce (e.g. purchasing)	37	33	35
Finding a job / career opportunities	35	26	43
Work / business productivity	32	23	40
Romantic life	31	22	35
Travel	31	25	32
Personal safety	29	17	27
Local transportation	28	18	24
Medicine and healthcare	24	14	30
Political expression	22	17	28

Mobile technology is having a transformative impact on Millennials' lives in substantive areas, such as *Education and Research, Access to News and Current Events, and Finding Job/Career Opportunities*

*Select answers shown

Millennials are tech savvy, but not all want a tech career

Agree That “I am on the cutting edge of technology”

United States



Western Europe



Latin America



Industry Most Likely to Pursue in the Future: Technology

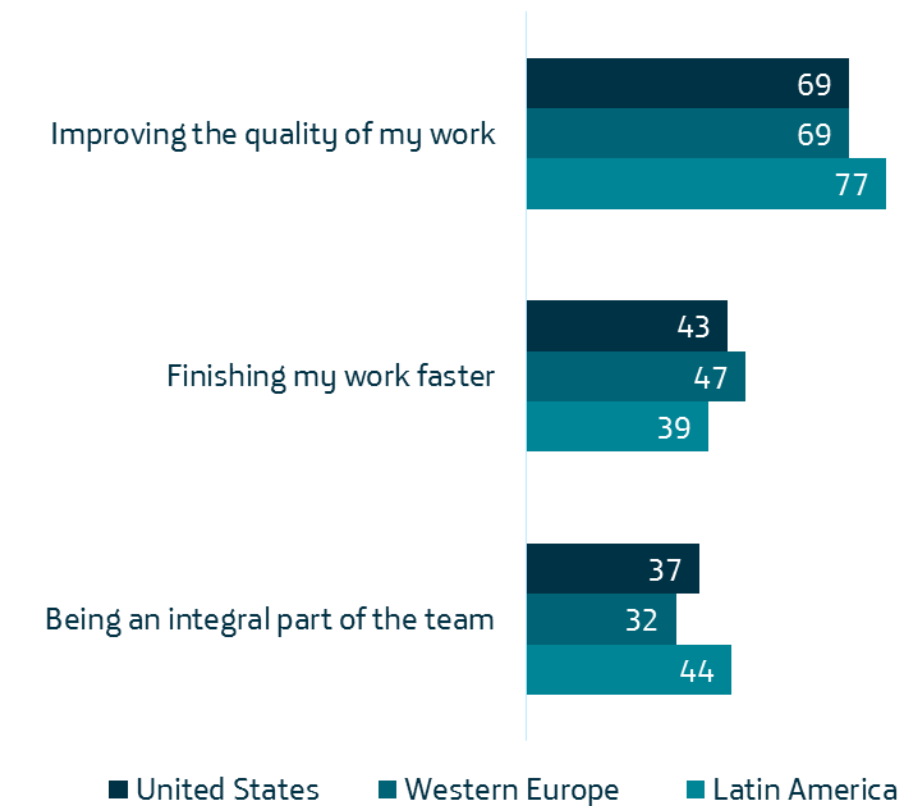
■ United States ■ Western Europe ■ Latin America



*Select answers shown

When it comes to tech skills, Millennials focus on learning the basics and see improving quality of their work as a benefit

Benefits to Having a Digital Skillset



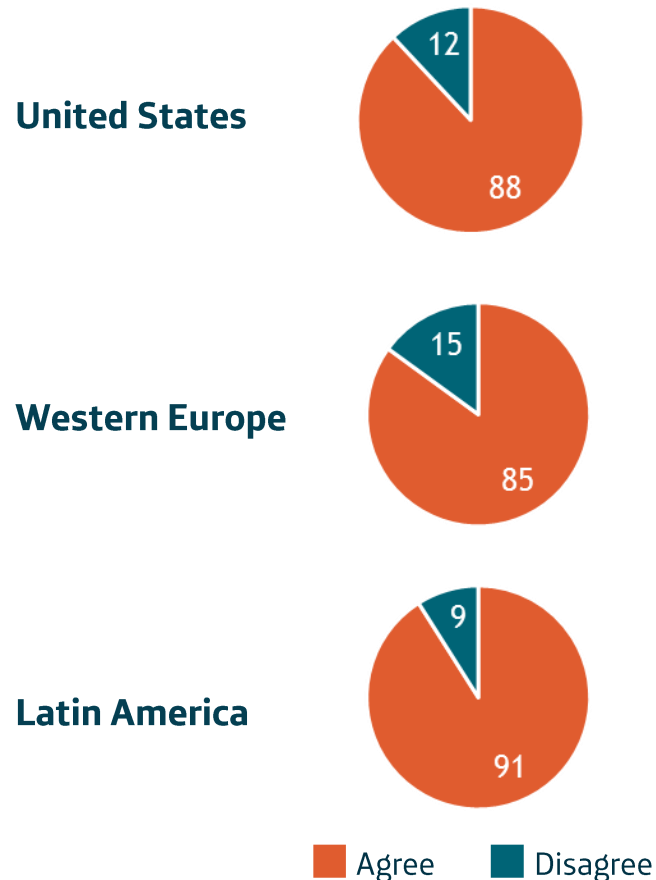
*Select answers shown

Most Important Skills to Get a Decent Paying Job

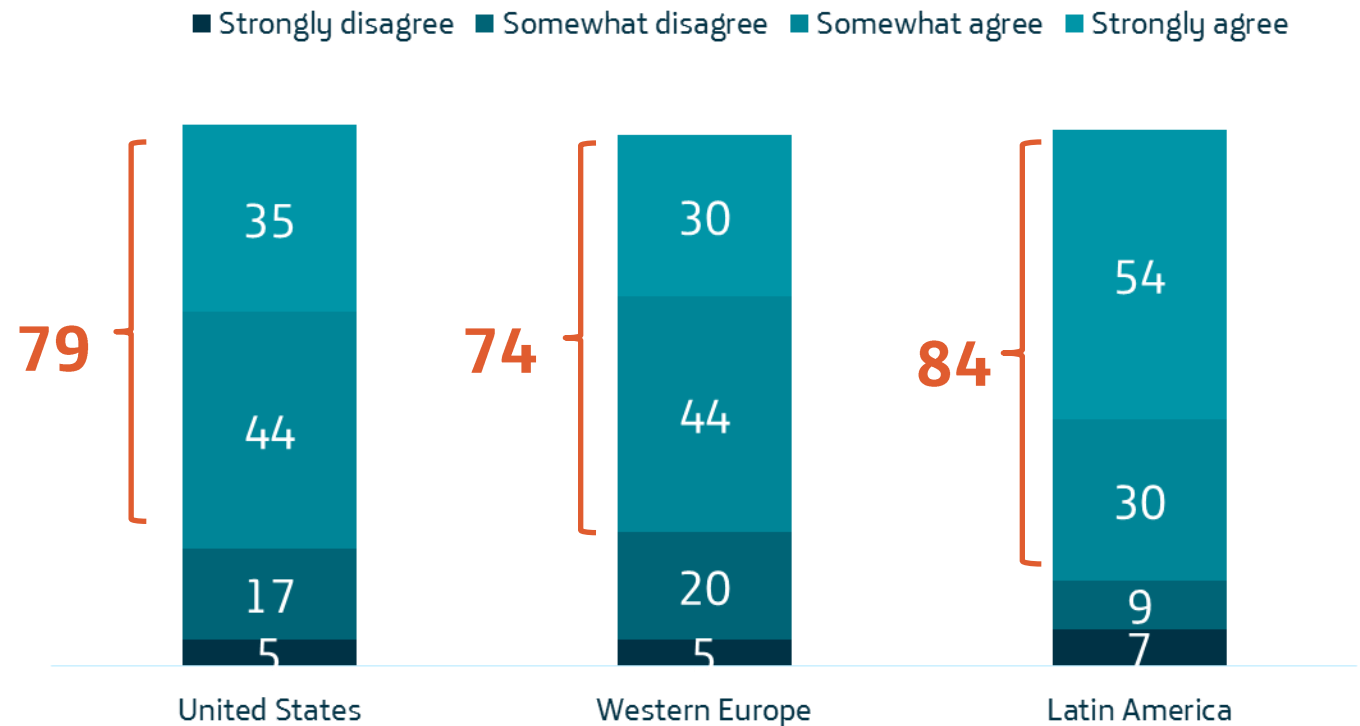
	United States	Western Europe	Latin America
Microsoft Office (Word, Excel, PowerPoint, Access, Outlook)	55	60	54
Coding / Programming (e.g. CSS, jQuery, HTML)	37	35	36
Typing speed	36	26	21
Social media (e.g. LinkedIn, Twitter)	25	24	19
Website design	24	25	30
Graphic design	21	21	30
Financial Modeling	20	24	22
Web analytics	20	16	16
Google applications (e.g. Google Docs)	17	14	17
Cloud technology	13	13	17
Blogging	8	7	7
Photo Editing (Photoshop)	8	11	11
Video Editing	8	9	11
Other	8	15	10

Privacy is a concern and Millennials are worried about being hacked...

Overall, I am concerned about the security and privacy of my data and information online

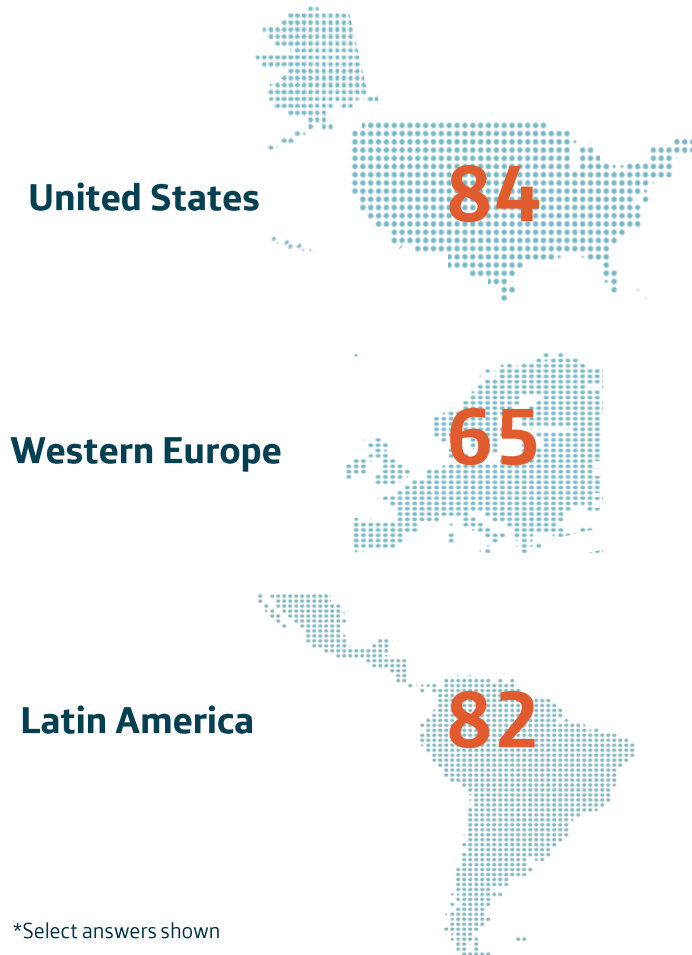


I am worried about getting hacked / someone stealing my information online



...But believe they understand and can manage the risks

I am in control of my personal data

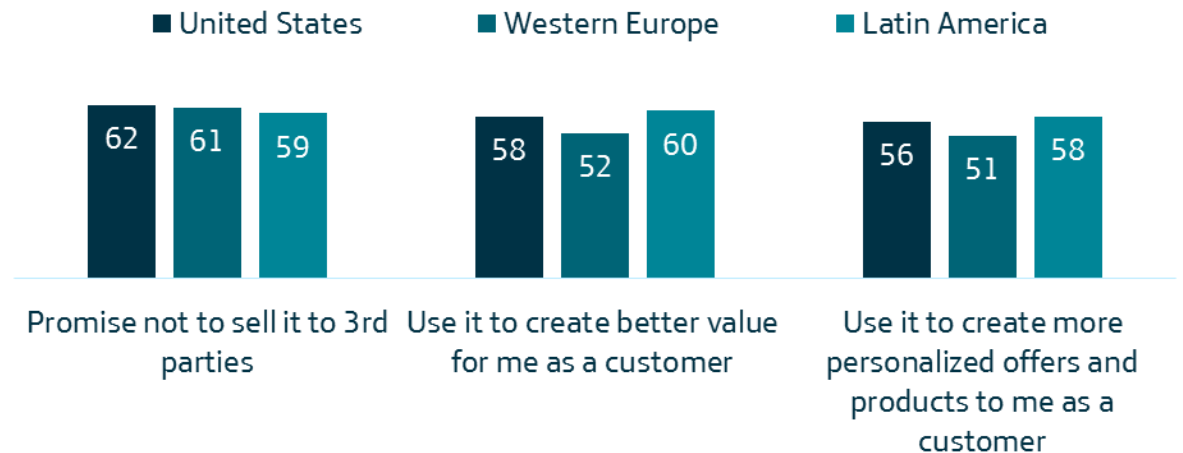


*Select answers shown

I actively take steps to protect my online security



I am comfortable giving companies access to my personal data if they...



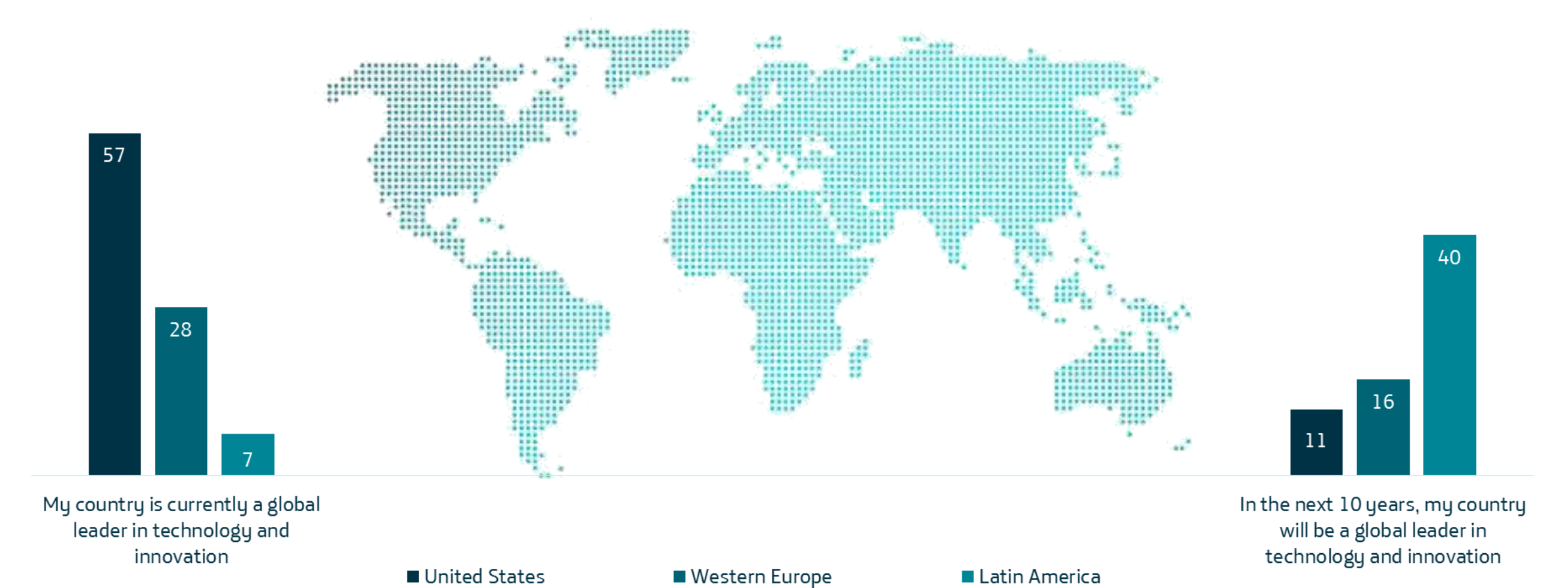
A man with short brown hair and a light beard, wearing a blue dress shirt and a dark tie, is standing in an office. He is holding a black marker in his right hand and is in the process of writing on a whiteboard. The whiteboard is partially visible on the left side of the frame. The background is a bright, out-of-focus office environment with other people and desks visible. A semi-transparent dark blue rectangular box is overlaid on the right side of the image, containing the company name and section title.

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Section 7_
Race To Be Next “Global
Technology Leader”

Those in Latin America see global technology and innovation leadership in their futures

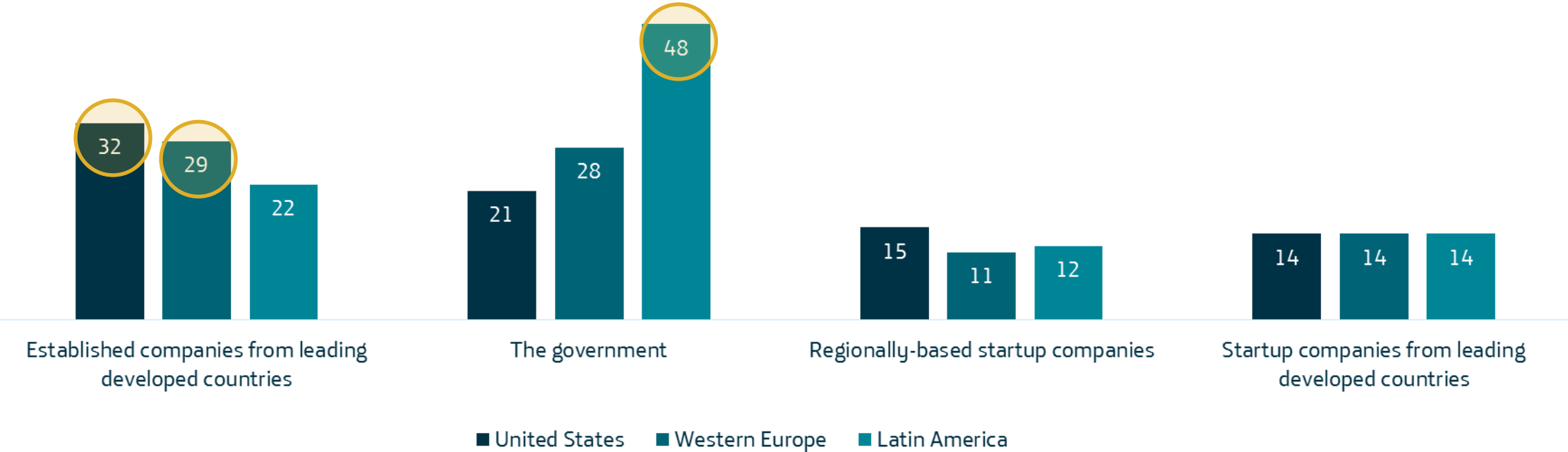
Now vs. The Future in Technology and Innovation Leadership



*Select answers shown

Latin America looks more to government to drive technological innovation, while US and Western Europe also look to established companies

Who Should Be Investing in Technology



*Select answers shown



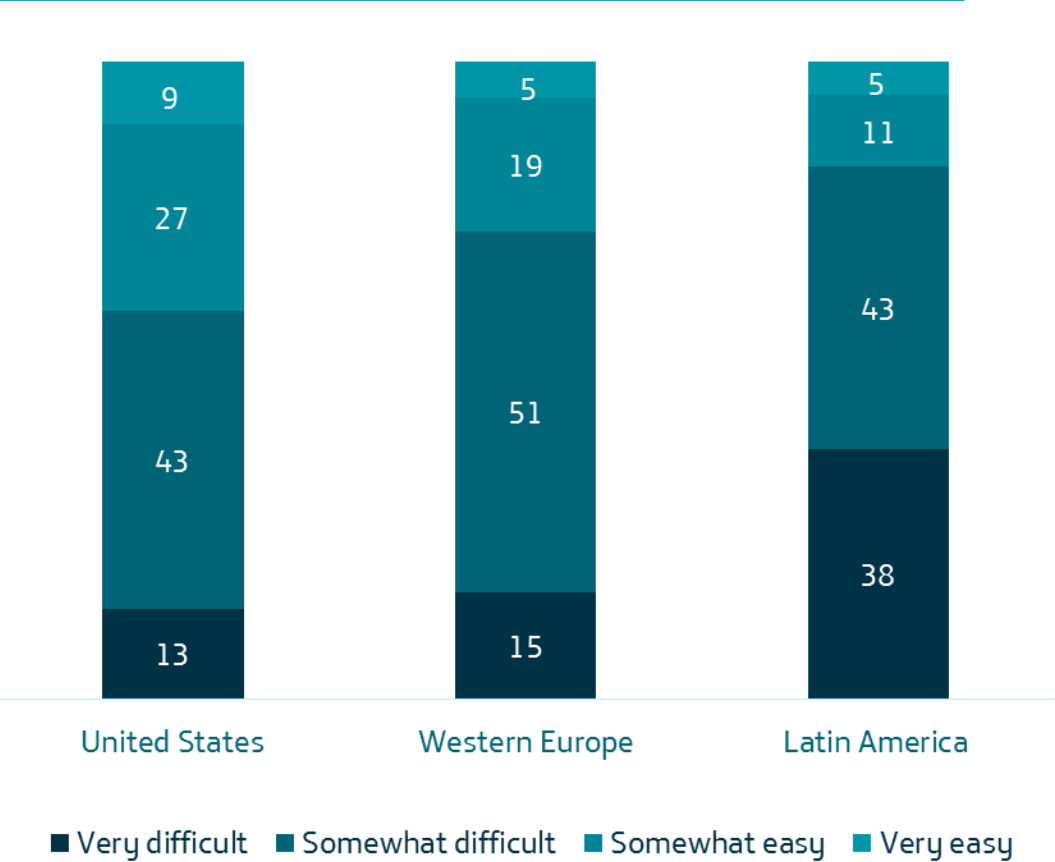
High	838.63
Low	856.45
Close	836.23
on Close (50)	845.12
on Close (100)	NA
on Close (200)	NA

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Section 8 Consideration For Those With Disabilities

Millennials recognize difficulties for those with disabilities, and tend to be split when it comes to agreement on if they receive equal treatment

Ease of Gaining Life-Improving Resources



*Select answers shown

Agreement That Individuals With Disabilities Receive Equal Treatment

	United States	Western Europe	Latin America
Receive equal benefits as individuals without disabilities	65	51	46
Earn equal salaries to individuals without disabilities	60	47	48
Have equal employment opportunities as individuals without disabilities	58	39	37
Are given equal career advancement opportunities as individuals without disabilities	55	43	39

They also hold companies to a high standard when it comes to inclusion of people with disabilities

Importance of Inclusion of Individuals With Disabilities

	United States	Western Europe	Latin America
The company I work for is inclusive of people with disabilities (e.g. employment, product design for all, involvement with local disability groups)	71	58	74
Companies I buy products and services from are inclusive of people with disabilities (e.g. employment, product design for all, involvement with local disability groups)	66	56	75



*Select answers shown

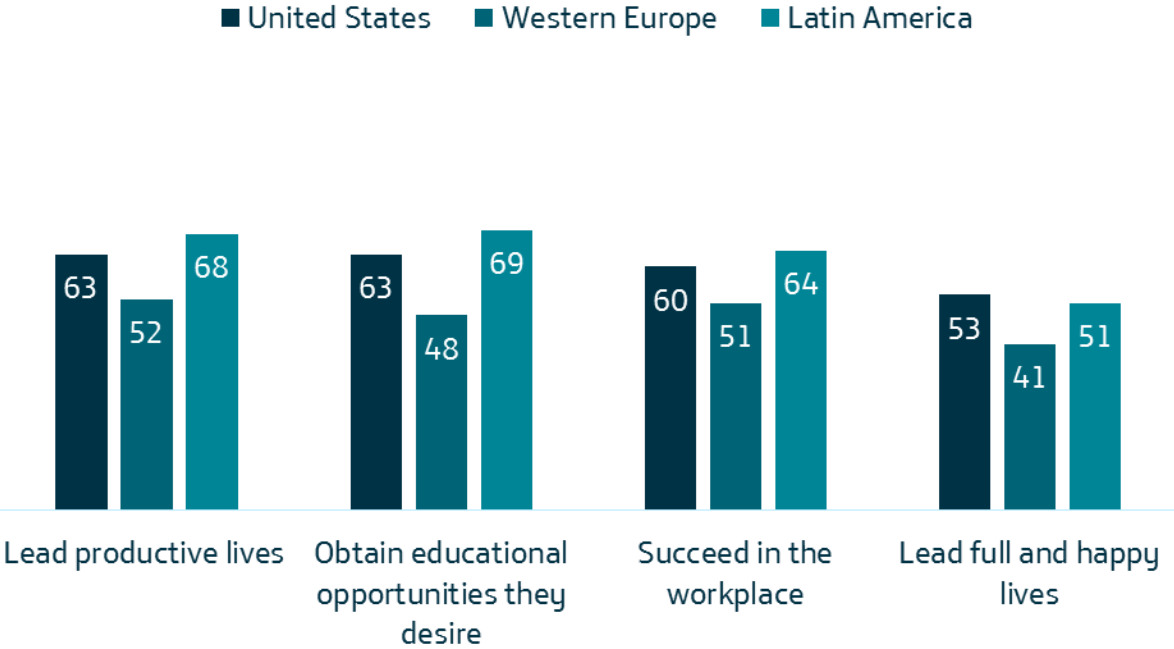
For individuals with disabilities, Millennials feel technology can be a hero

Ability to Have Greatest Impact on Lives of Those With Disabilities

	United States	Western Europe	Latin America
Technological advancement	18	19	25
National government	15	17	24
Local communities	15	9	4
Educational institutions	13	12	13
Charities/NGOs	12	12	11

*Select answers shown

Technology Can Help Individuals With Disabilities Significantly To...





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Demographics_

Demographics

Gender_

	Global	United States	Western Europe	Latin America
Male	50	50	50	50
Female	50	50	50	50

Age_

	Global	United States	Western Europe	Latin America
18-24	53	55	53	51
25-30	47	45	47	49

Marital Status_

	Global	United States	Western Europe	Latin America
Single	64	63	64	66
Married	19	24	12	19
Living together	14	10	22	12
Separated / Divorced	1	1	1	1
Prefer not to say	2	2	1	2

Employment Status_

	Global	United States	Western Europe	Latin America
Employed, working outside of home	47	46	44	49
Employed, working at home	7	7	4	9
Student	30	28	34	30
Not currently employed or retired	11	18	11	6
Other	3	1	4	4
Prefer not to say	2	1	2	2

Parental Status_

	Global	United States	Western Europe	Latin America
Children	26	25	20	31
No children	71	73	79	66
Prefer not to say	3	2	2	4

Education_*

	Global	United States	Western Europe	Latin America
Primary	5	0	2	11
Secondary	55	62	64	45
Collegiate	39	38	34	42
Don't know/prefer not to say	1	0	1	1

Income_*

	Global	United States	Western Europe	Latin America
Lower	33	36	36	30
Middle	47	53	47	41
Higher	7	2	4	12
Don't know/prefer not to say	13	9	12	16

*We have created standardized groupings to better show this demographic, as scales are not identical across geographies. These demographics can give a sense of who the Millennials surveyed are relative to their respective country answer choices. Results should be considered directional rather than precise comparisons.

Appendix: Question Text

Slide 6: Q5. Overall, how satisfied are you with your life?

Slide 7: Q7. How optimistic are you about your future? *(Showing top box)*
Q27. In general, do you think your country's best days are ahead, or behind?

Slide 8: Q8. Looking ahead to 10 years from now, which of the following accomplishments is most important to you personally (by the year 2024)? *(Select answers shown)*
Q20. Which industries are you most likely to pursue in the future? *(Select answers shown)*

Slide 9: Q42. Do you believe you can make a local difference? *(Select answers shown)*
Q43. Do you believe you can make a global difference? *(Select answers shown)*

Slide 11: Q6. Of the following, which three have been the most influential in shaping your outlook on life to date? *(Select answers shown)*

Slide 12: Q8. Looking ahead to 10 years from now, which of the following accomplishments is most important to you personally (by the year 2024)? *(Select answers shown)*
Q19. 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. *(Select answers shown)*

Slide 13: Q18. 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
Q42. Do you believe you can make a local difference?
Q63. How much do you agree or disagree with the following statement? I am on the cutting edge of technology

Slide 14: Q18. 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
Q42. Do you believe you can make a local difference?
Q63. How much do you agree or disagree with the following statement? I am on the cutting edge of technology

Slide 16: Q21. How interested are you in seeking employment opportunities abroad? *(Showing top two box)*

Appendix: Question Text

Slide 17: Q23. What are the biggest benefits of working abroad? *(Select answers shown)*

Slide 18: Q24. Are you concerned about your country experiencing a "brain drain" - i.e. having the best and brightest citizens leave to pursue opportunities abroad?
(Showing top two box)
Q25. Which is closest to your view?

Slide 20: Q29. Do you think that the economy in your country is headed in the right direction or wrong direction?

Slide 21: Q28. In your opinion, what is the most important issue facing your country today? *(Select answers shown)*
Q37. Which of the following are the most important environmental and social issues facing the world today? Please pick the top 3 most important issues. *(Select answers shown)*

Slide 22: Q31. What issues, if any, hinder your country's growth? *(Select answers shown)*

Slide 24: Q16. How satisfied are you with your country's educational system? *(Select answers shown)*
Q33. 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. *(Select answers shown)*

Slide 25: Q17. When it comes to the educational system in your country, which elements need improvement? Please select all that apply. *(Select answers shown)*

Slide 26: Q142. Thinking about technology, which of the following statements do you agree with more?

Slide 27: Q11. Which field of study do you believe is most important for ensuring your personal future success?

Slide 29: g64mA. What kind of access do you have to each of the following technological devices? Please select all that apply. *(Select answers shown)*

Slide 30: g73mA: When is the most recent time that you used personal mobile technology (on a tablet / smartphone) to do each of the following activities? *(Select answers shown)*

Appendix: Question Text

Slide 31: g96mA: 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 *(Select answers shown)*

Slide 32: Q63. How much do you agree or disagree with the following statement? I am on the cutting edge of technology *(Select answers shown)*
Q20: Which industries are you most likely to pursue in the future? *(Select answers shown)*

Slide 33: Q144. When it comes to the workplace, which of the following do you believe are the top 2 benefits to having a digital skillset / knowing how to use digital tools? *(Select answers shown)*
Q143. 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 choices.

Slide 34: Q137. 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
Q126mA: How strongly do you agree with the following statements?

Slide 35: Q123mA. How strongly do you agree with the following statements? *(Select answers shown)*
Q125mA: How strongly do you agree with the following statements? *(Select answers shown)*
Q132mA, Q133mA, Q134mA: How strongly do you agree with the following statements? *(Select answers shown)*

Slide 37: Q147. Which is closest to your view? *(Select answers shown)*

Slide 38: Q148. Who should primarily be investing in technology in your country/region? *(Select answers shown)*

Slide 40: Q52. How easy or difficult is it for individuals with disabilities to gain access to tools / resources that can improve their everyday lives? *(Select answers shown)*
g57mA. How strongly do you agree or disagree with the following? Individuals with disabilities... *(Select answers shown)*

Slide 41: Q61. How important is each of the following? *(Select answers shown)*
Q62. How important is each of the following? *(Select answers shown)*

Slide 42: Q51. Which of the following has the ability to deliver the greatest significant impact and change for individuals with disabilities? Please select only one.
g53mA. To what degree can technology help individuals with disabilities ... *(Select answers shown)*

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