

Telefónica Global Millennial Survey:

Young adults in Germany believe in all that technology has to offer and their own potential

Telefónica Global Millennial Survey

Telefónica's Global Millennial Survey is the largest and most comprehensive survey of Millennial adults aged 18-30 to date. Representatives of this digital generation have grown up with the Internet and mobile communication. Today's 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 the millennial generation. Understanding them, Telefónica as a global telecommunications enterprise can help to empower them to reap the benefits of the technology that we create and inspire the opportunities of entrepreneurship and innovation.

About the method

In collaboration with the Financial Times, Telefónica commissioned 12,171 quantitative online interviews with young adults between the ages of 18 and 30 in 27 countries of the six regions North America, Latin America, Western Europe, Central and Eastern Europe, Asia, and the Middle East and Africa. The study consists of 190 questions and was carried out in the period from 11 January to 4 February 2013 by Penn Schoen Berland, a renowned international market research company.

The respondents were adult millennials from Argentina, Australia, Brazil, Canada, Chile, China, Columbia, the Czech Republic, Egypt, France, Germany, India, Israel, Italy, Japan, Korea, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, Spain, Turkey, the UK and Venezuela.

It has not yet been decided whether the study will be repeated and, if so, how often.

Results

TECHNOLOGY

German millennials are true believers in all that technology has to offer. They are aware of the influence technology has on their lives, but they attach more importance to traditional values than their international peers.

- Young adults in Germany see technology as an enabler: 81 percent of German millennials are convinced that technology creates more opportunities for all instead of just a selected few. Worldwide this figure is 69 percent.
- However, 77 percent are also concerned that technology has widened the gap between the rich and the poor. 62 percent of millennials worldwide agree.
- 81 percent of German millennials feel they are on the cutting edge of technology, compared with 75 percent worldwide.
- For millennials in Germany, factors such as family (87%), friends (74%) and school (72%) have been more influential in shaping their outlook on life than the global millennial average (family 85%, friends 56%, school 61%).
- The influence of technology ranks fourth (20% in Germany, 30% worldwide).
- Although the millennials are a smartphone and "always on" generation, young adults in Germany hang on more to traditional media than their international peers.

THE ECONOMY

Although they are less affected by the economic crisis, German millennials do worry about economic development, especially their financial security in old age. Their opinion is divided on the future of their country.

- 62 percent are convinced that the global economy is on the wrong track. 52 percent of millennials worldwide agree. In Western Europe this figure is as high as 74 percent.
- The economy is the most important issue for the whole millennial generation (23% in Germany, 27% worldwide).
- An equally big problem area for German millennials is the issue of social inequality (23%). For millennials worldwide this ranks second with 18%.
- Young adults in Germany see their financial security in old age as being at risk. 62 percent expect they have to continue working indefinitely; worldwide just 39 percent are of the same opinion.
- The majority of millennials (67%) also feel that transition from school to the workplace environment is difficult. In Western Europe this view is shared by 74 percent.
- In general terms, 53 percent of German millennials believe their country's best days are behind it (compared with 33% worldwide and 59% in Western Europe). 47% believe their country's best days are still ahead (as opposed to 67% worldwide and 41% in Europe).

INVOLVEMENT IN SOCIETY, POLITICS AND THE ECONOMY

When it comes to getting involved, young adults in Germany look for new ways with the help of technology. In terms of being an entrepreneur, they see plenty of opportunities, but in fact it is not that important to them.

- Two-thirds of millennials in Germany believe they can make a local difference. In Western Europe 59 percent share this opinion.
- More than half (54%) believe their country's current political system does not represent their values and beliefs. Two-thirds say they "sometimes" or "never" participate in their country's political process, e.g. elections.
- 76 percent, on the other hand, feel that technology has made them better informed about political issues in their country. More than half find that technology has made their government more transparent.
- For 72 percent, social media plays an important role in current political events and movements in the country.
- 73 percent of young adults in Germany believe they have opportunities in their country to become an entrepreneur. However, only every third young German (30%) says this is an important life accomplishment for him/her, whereas worldwide this figure is 55 percent.

THE NEW "MILLENNIAL ELITE"

High affinity to technology, entrepreneurial spirit and the belief that they can make a local difference are the characteristics of the new millennial elite, the leaders of tomorrow. Compared with the other countries, Germany ranks in the middle.

- Eleven percent of those surveyed worldwide belong to the so-called millennial elite. This group is defined by their excellent personal knowledge of and comfort level with technology, keen entrepreneurial spirit and the unshakeable belief that they can make a local difference.
- The representatives of the millennial elite are more optimistic, more career-oriented and more driven than their contemporaries.
- Of the young adults in Germany, twelve percent belong to the millennial elite. Compared with the other countries, this puts Germany in the middle.
- Leading the field are the Latin American countries Columbia (27%), Peru (26%), Chile and Venezuela (22% each), and bringing up the rear are Italy (4%), Korea (2%) and Japan (2%).

GENDER GAP

The gap between the sexes continues in this generation also. Even technology is not yet the key to closing the gender gap.

- Even though just as many female as male millennials in Germany own a smartphone (76% vs. 79%) or laptop computer (76% vs. 75%), and even though young women spend just as much time online every day (5 hours) as their male counterparts, young men feel more confident using modern technology. 85 percent of men describe their personal knowledge and comfort level with technology as "excellent" or "good", whereas among women it is just 65 percent.

- Only 6 percent of young women belong to the millennial elite, but 17 percent of men do.
- 41 percent of German millennials believe that women have to fight harder for career success than men. In Western Europe 33 percent believe this; in France, for example, just 17 percent.
- 79 percent of German millennials believe that women earn less money for the same job. In Western Europe 65 percent share this opinion; in Turkey, on the other hand, just 39 percent.

All results of the Telefónica Global Millennial Survey can be found at <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 **Tuesday 4 June at 1.01 a.m. German time.**
- The results of the Telefónica Global Millennial Study will be presented for the first time on 4 June as part of the "Global Millennial Summit" in London. This marks the beginning of a global series of events organised by the Financial Times and Telefónica.
- Further Global Millennial Summits will take place on 6 June 2013 in São Paulo and in Brussels in the autumn.
- In Germany the results of the study will also be announced on 4 June via a press release.
- On 6 June, Telefónica Germany together with its German media partner DIE ZEIT will host a conference in Berlin entitled "The Digital Generation – How it is Shaping our Society and Economy".

Quotes

René Schuster, Chief Executive Officer of Telefónica Deutschland.

"These results reveal powerful insights about the Millennial generation in Germany and the issues that impact them. This generation – socially conscious, confident in their ability to make a local difference and strongly believe in technology's ability to affect positive change – has a powerful future ahead of them. These results will help us address the challenges that face this generation in Germany – concerns about the economy, their careers, social inequality and the environment – not only for the future of our business, but for the future of our country and world."

Dr. Heike Kahl, Director of the German Children and Youth Foundation

"The study provides a glimpse of the generation of young adults worldwide and fills a gap in the international study landscape. Up to now there has been too little data on this age group and not enough international comparative studies on the perspectives of young people. The results therefore provide valuable starting points for politics, business and civil society. They show that together we need to ensure that we harness this generation's creative drive and courage to change. This is the central resource for the future viability of our society."

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:** International programme from Telefónica aiming to empower and inspire young people between the ages of 14 and 25 to make the most of their ideas with the help of digital technologies.
- **Think Big School:** Telefónica aims to encourage the innovative and entrepreneurial spirit of pupils and boost their digital literacy. Telefónica forms an interface between school and business by inviting pupils in years 9 and 10 to the company for a project day, where they develop their own ideas and learn how to use digital media and technologies.
- **Talentum:** Telefónica initiative that creates career prospects for young people through an internship, training or the university graduate programme. The aim is to train participants to become future leaders 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 biggest technology festival in the world. Thousands of "campuseros" come together for seven days in varying locations around the world to take part in talks, workshops, competitions and hackathons. In summer 2012 Berlin played host to Europe's first Campus Party. This year, Telefónica will bring the young digital elite together from 2 to 7 September in London.

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Appendix

TECHNOLOGY

What kind of access do you have to each of the following technological devices? Please select all that apply. (Showing "I own it")	Global	Western Europe	Germany	Germany Male	Germany Female
Smartphone (e.g. iPhone, BlackBerry, Android, etc.)	76	79	78	79	76
Laptop computer	74	72	75	75	76
Desktop computer	50	49	55	65	44
Tablet	28	22	18	22	14

Approximately how many hours do you think you spend online each day?	Global	Western Europe	Germany	Germany Male	Germany Female
Mean	6	5	5	5	5

Which statement about opportunities and technology do you agree with more?	Global	Western Europe	Germany	Germany Male	Germany Female
Technology creates more opportunities for all	69	76	81	82	80
Technology creates more opportunities for a select few	31	24	19	18	20

Thinking about the impact of technology, which of the following do you agree with more?	Global	Western Europe	Germany	Germany Male	Germany Female
Technology has widened the gap between the rich and the poor	62	66	77	72	83
Technology has shrunk the gap between the rich and the poor	38	34	23	28	17

How much do you agree or disagree with the following statement? <i>I am on the cutting edge of technology</i>	Global	Western Europe	Germany	Germany Male	Germany Female
Strongly agree	19	21	18	25	10
Somewhat agree	56	58	63	66	59
Somewhat disagree	21	18	16	7	25
Strongly disagree	5	3	4	2	6

Which of the following statements most closely represents your opinion on language barriers in the digital age?	Global	Western Europe	Germany	Germany Male	Germany Female
Technology makes language barriers easier to overcome	87	89	87	89	86
Technology makes language barriers harder to overcome	13	11	13	11	14

In your opinion, what is the best source for each of the following?					
Credible coverage of news	Global	Western Europe	Germany	Germany Male	Germany Female
Internet	37	35	28	35	21
Television	36	32	34	31	37
Printed newspapers/magazines	15	21	26	23	30
Social media	8	5	4	5	4
Radio	4	6	7	6	9

In your opinion, what is the best source for each of the following?					
A developing news story/crisis	Global	Western Europe	Germany	Germany Male	Germany Female
Internet	45	42	38	44	32
Television	34	33	38	35	40
Social media	9	7	6	7	6
Printed newspapers/magazines	8	12	10	8	12
Radio	4	5	8	6	10

In your opinion, what is the best source for each of the following?					
Entertainment	Global	Western Europe	Germany	Germany Male	Germany Female
Internet	53	41	34	37	32
Television	31	44	50	50	50
Social media	11	8	8	7	10
Printed newspapers/magazines	3	4	4	4	4
Radio	2	3	4	3	5

Of the following, which three have been the most influential in shaping your outlook on life to date?	Global	Western Europe	Germany	Germany Male	Germany Female
Family	85	85	87	81	93
School/education	61	62	72	69	76
Friends	56	67	74	66	81
Technology	30	29	20	28	12
Economy	29	23	13	16	10
Religion	16	11	10	11	10
Media	15	15	20	23	17
Government	8	7	4	6	1

ECONOMY

In your opinion, what is the most important issue facing the region where you live?	Global	Western Europe	Germany	Germany Male	Germany Female
The economy	27	34	23	25	21
Social inequality	18	15	23	21	24
Education	10	8	13	11	14
Poverty	10	12	10	9	10
The environment	9	6	10	11	9
Healthcare	7	4	3	4	3
Political unrest/instability	6	5	3	3	3
Political freedom	3	2	1	1	2
Terrorism	3	1	2	2	2
Gender inequality	2	1	2	2	2
Racial inequality	2	3	2	1	2
War	1	1	2	3	2
Religious freedom	1	1	1	1	1
Other	4	6	6	6	6

In general, do you think the global economy is headed in the right direction, or is it off on the wrong track?	Global	Western Europe	Germany	Germany Male	Germany Female
Right direction	48	26	38	41	35
Wrong track	52	74	62	59	65

In general, do you think that the economy in your region is headed in the right direction, or is it off on the wrong track?	Global	Western Europe	Germany	Germany Male	Germany Female
Right direction	50	34	52	53	51
Wrong track	50	66	48	47	49

In general, do you think your country's best days are ahead, or behind?	Global	Western Europe	Germany	Germany Male	Germany Female
My country's best days are ahead	67	41	47	50	43
My country's best days are behind	33	59	53	50	57

In your opinion, how easy or difficult is it for your generation to transition from school to the workplace environment?	Global	Western Europe	Germany	Germany Male	Germany Female
Very easy	9	5	5	7	3
Somewhat easy	29	22	28	33	23
Somewhat difficult	46	45	52	47	57
Very difficult	17	29	15	13	17

Thinking about your future, which of the following statements most closely represents your expectations for your retirement?	Global	Western Europe	Germany	Germany Male	Germany Female
I expect to have enough money to retire comfortably	61	44	38	41	36
I expect to have to continue working indefinitely	39	56	62	59	64

INVOLVEMENT IN POLITICS, SOCIETY AND ECONOMY

Do you believe you can make a local difference?	Global	Western Europe	Germany	Germany Male	Germany Female
I believe I can make a local difference	62	59	67	72	61
I don't believe I can make a local difference	38	41	33	28	39

How much do you agree or disagree with the following statement about your country's current political system? <i>I believe my country's current political system represents my values and beliefs</i>	Global	Western Europe	Germany	Germany Male	Germany Female
Strongly agree	9	6	8	10	6
Somewhat agree	39	29	38	43	34
Somewhat disagree	31	33	40	34	46
Strongly disagree	21	32	14	13	14

How often do you participate in your country's political process (e.g. voting, contributing money to a political candidate, etc.)?	Global	Western Europe	Germany	Germany Male	Germany Female
Always participate	28	34	33	40	27
Sometimes participate	43	44	45	43	48
Never participate	29	21	21	17	25

How strongly do you agree or disagree with the following statement? <i>Technology has made me better informed about political issues in my country</i>	Global	Western Europe	Germany	Germany Male	Germany Female
Strongly agree	38	29	24	26	21
Somewhat agree	52	53	52	53	51
Somewhat disagree	8	14	18	16	21
Strongly disagree	2	4	5	5	6

How strongly do you agree or disagree with the following statement? <i>Technology has made my government more transparent</i>	Global	Western Europe	Germany	Germany Male	Germany Female
Strongly agree	19	12	12	15	10
Somewhat agree	52	45	46	49	43
Somewhat disagree	22	29	33	26	40
Strongly disagree	8	13	9	10	8

How strongly do you agree or disagree with the following statement? <i>Social media plays an important role in current political events and movements in my country</i>	Global	Western Europe	Germany	Germany Male	Germany Female
Strongly agree	33	24	21	24	19
Somewhat agree	52	53	51	48	53
Somewhat disagree	12	18	22	21	23
Strongly disagree	3	5	6	7	5

How much do you agree or disagree with the following statement? <i>I have opportunities in my country to become an entrepreneur or develop and bring an idea to the market</i>	Global	Western Europe	Germany	Germany Male	Germany Female
Strongly agree	19	15	24	30	17
Somewhat agree	49	40	49	48	50
Somewhat disagree	23	27	22	17	27
Strongly disagree	9	17	5	4	6

How important or unimportant are each of the following life accomplishments to you personally?					
Being an entrepreneur	Global	Western Europe	Germany	Germany Male	Germany Female
Very important	22	13	7	9	5
Somewhat important	33	31	23	27	18
Not very important	32	37	43	43	43
Not at all important	14	20	28	21	34

MILLENNIAL ELITE

% of Sample that are TNMEs	Global	Western Europe	Germany	Germany Male	Germany Female
The New Millennial Elites	11	9	12	17	6

Position	Country	% of country respondents that are The New Millennial Elites
1	Colombia	27%
2	Peru	26%
3	KSA	26%
4	Chile	22%
5	Venezuela	22%
6	India	22%
7	Mexico	21%
8	South Africa	20%
9	Brazil	18%
10	US	16%
11	Australia	15%
12	Poland	14%
13	Canada	13%
14	UK	13%
15	Germany	12%
16	Israel	12%
17	Argentina	10%
18	Turkey	10%
19	Egypt	8%
20	China	7%
21	Spain	6%
22	France	6%
23	Czech Republic	6%
24	Russia	6%
25	Italy	4%
26	Korea	2%
27	Japan	1%

How would you describe your personal knowledge and comfort level with technology?	Global Millennials	The New Millennial Elite
Excellent	30%	72%

Of the following, which three have been the most influential in shaping your outlook on life to date?	Global Millennials	The New Millennial Elite
Family	85%	82%
School/education	61%	55%
Friends	56%	48%
Technology	30%	44%
Economy	29%	31%
Religion	16%	17%
Media	15%	14%
Government	8%	9%

What kind of access do you have to each of the following technological devices? Please select all that apply. (Showing "I own it")	Global Millennials	The New Millennial Elite
Smartphone (e.g. iPhone, BlackBerry, Android, etc.)	76%	82%
Laptop computer	74%	80%
Desktop computer	50%	66%
Tablet	28%	46%

How optimistic are you about your future?	Global Millennials	The New Millennial Elite
Very optimistic	32%	61%

In general, do you think your country's best days are ahead, or behind?	Global Millennials	The New Millennial Elite
My country's best days are ahead	67%	79%

Do you believe you can make a global difference?	Global Millennials	The New Millennial Elite
I believe I can make a global difference	40%	74%

How important or unimportant are each of the following life accomplishments to you personally?	Global Millennials	The New Millennial Elite
Making it to the top of your career (Very important)	43%	66%

In your opinion, how easy or difficult is it for your generation to transition from school to the workplace environment?	Global Millennials	The New Millennial Elite
Easy	38%	61%

How often do you participate in your country's political process (e.g. voting, contributing money to a political candidate, etc.)?	Global Millennials	The New Millennial Elite
Always participate	28%	46%

How strongly do you agree or disagree with the following statement? <i>Technology has made me better informed about political issues in my country</i>	Global Millennials	The New Millennial Elite
Strongly agree	38%	67%

How strongly do you agree or disagree with the following statement? <i>Social media plays an important role in current political events and movements in my country</i>	Global Millennials	The New Millennial Elite
Strongly agree	33%	60%

How strongly do you agree or disagree with the following statement? <i>Technology has made my government more transparent</i>	Global Millennials	The New Millennial Elite
Strongly agree	19%	45%

GENDER GAP

How would you describe your personal knowledge and comfort level with technology?	Global	Western Europe	Germany	Germany Male	Germany Female
Excellent	30	33	20	28	12
Good	49	53	55	57	53
Basic	18	12	21	13	29
I'm not comfortable with technology	3	2	5	3	7

Who fights harder to be successful in the workplace?	Global	Western Europe	Germany	France
Women fight harder	36	33	41	17
Men fight harder	13	10	12	9
Women and men fight equally hard to be successful in the workplace	51	57	47	73

Which of the following statements comes closest to your view?	Global	Western Europe	Germany	Turkey
Women and men in my country receive the same pay for the same job	47	35	21	61
Women and men in my country don't receive the same pay for the same job	53	65	79	39