



Telefónica Global Millennial Survey: Europe Results

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Introduction

The largest and most comprehensive global study of adult Millennials conducted to date_



Methodology

Region / Country			Sample size	MOE
North America	US		1,000	+/-3.1%
	Canada		151	+/-8.0%
Latin America	Brazil		1,028	+/-3.1%
	Mexico		503	+/-4.4%
	Argentina		500	+/-4.4%
	Peru		150	+/-8.0%
	Chile		500	+/-4.4%
	Colombia		150	+/-8.0%
	Venezuela		150	+/-8.0%
Western Europe	Spain		915	+/-3.2%
	UK		900	+/-3.3%
	Germany		919	+/-3.2%
	Italy		251	+/-6.2%
	France		251	+/-6.2%
Central & Eastern Europe	Czech Republic		500	+/-4.4%
	Russia		500	+/-4.4%
	Poland		264	+/-6.0%
Asia	India		1,000	+/-3.1%
	China		1,003	+/-3.1%
	Japan		150	+/-8.0%
	Korea		151	+/-8.0%
	Australia		151	+/-8.0%
ME / Africa	Turkey		251	+/-6.2%
	Israel		150	+/-8.0%
	KSA		232	+/-6.4%
	Egypt		250	+/-6.2%
	South Africa		201	+/-6.9%
TOTAL			12,171	+/- .9%

Telefónica in partnership with the Financial Times, commissioned 12,171 online quantitative interviews among Millennials, aged 18-30, across 27 countries in six regions. Penn Schoen Berland conducted the 190 question survey from 11 January – 4 February 2013.

Country sample sizes represented in the global number are weighted by the percent of the population in each country with access to the Internet. The global margin of error is +/- .9 percent.



Western Europe Demographics		Central & Eastern Europe Demographics	
18-24 yrs old	53%	18-24 yrs old	52%
25-30 yrs old	47%	25-30 yrs old	48%

Please note, questions in which answer choices are mutually exclusive and all answer choices are displayed, percents may not add up to exactly 100% due to rounding.

Key Themes

1 Me, Myself and Technology

Like Millennials globally, European Millennials are highly comfortable with technology, credit it for having been highly influential in their lives, and think that it is an important field of study to ensure personal future success.

2 What makes Millennials tick?

European Millennials exhibit a high degree of concern about the state of both their regional and global economies. These concerns are also reflected in their anxiety surrounding progressions into the workplace and retirement. Compared to Millennials globally, more European Millennials say they expect to have to continue working indefinitely, and will not have enough money to retire comfortably.

3 Where does the opportunity lie?

Today, European Millennials believe the most important ways to make a difference in the world are through improving the access to and the quality of education, protecting the environment, and eliminating poverty. However, European Millennials are less confident about their ability to make a local and global difference, and are more uncertain that their values and beliefs are adequately represented by their governments compared to Millennials worldwide.

4 Millennial Leaders

The Millennial Leaders are the 11 percent who are the most likely to drive global change. They are defined by access to technology, a passion to participate in solving challenges facing communities and the world, and the ambition to succeed. European Millennial Leaders, compared to European Millennials, are more career orientated, have a greater belief they can make a difference, civically engaged, and more empowered to drive change through technology.

01

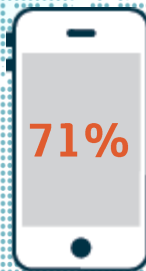
Me, Myself and Technology



Millennials Are A Smartphone Generation

Globally 76% say I own a smartphone

North America



Laptop	83%
Desktop	50%
Tablet	37%

Western Europe



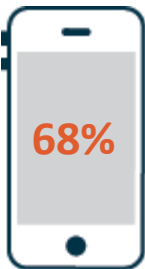
Laptop	72%
Desktop	49%
Tablet	22%

Central & Eastern Europe



Laptop	64%
Desktop	56%
Tablet	23%

Latin America



Laptop	62%
Desktop	58%
Tablet	22%

Middle East & Africa



Laptop	66%
Desktop	45%
Tablet	20%

Asia



Laptop	77%
Desktop	49%
Tablet	31%

Global smartphone penetration
in 2011: 30%*

European Millennials Are Connected And Online

Globally, Millennials spend an average of 6 hours online each day

North America



Latin America



Western Europe



Central & Eastern Europe



Middle East & Africa



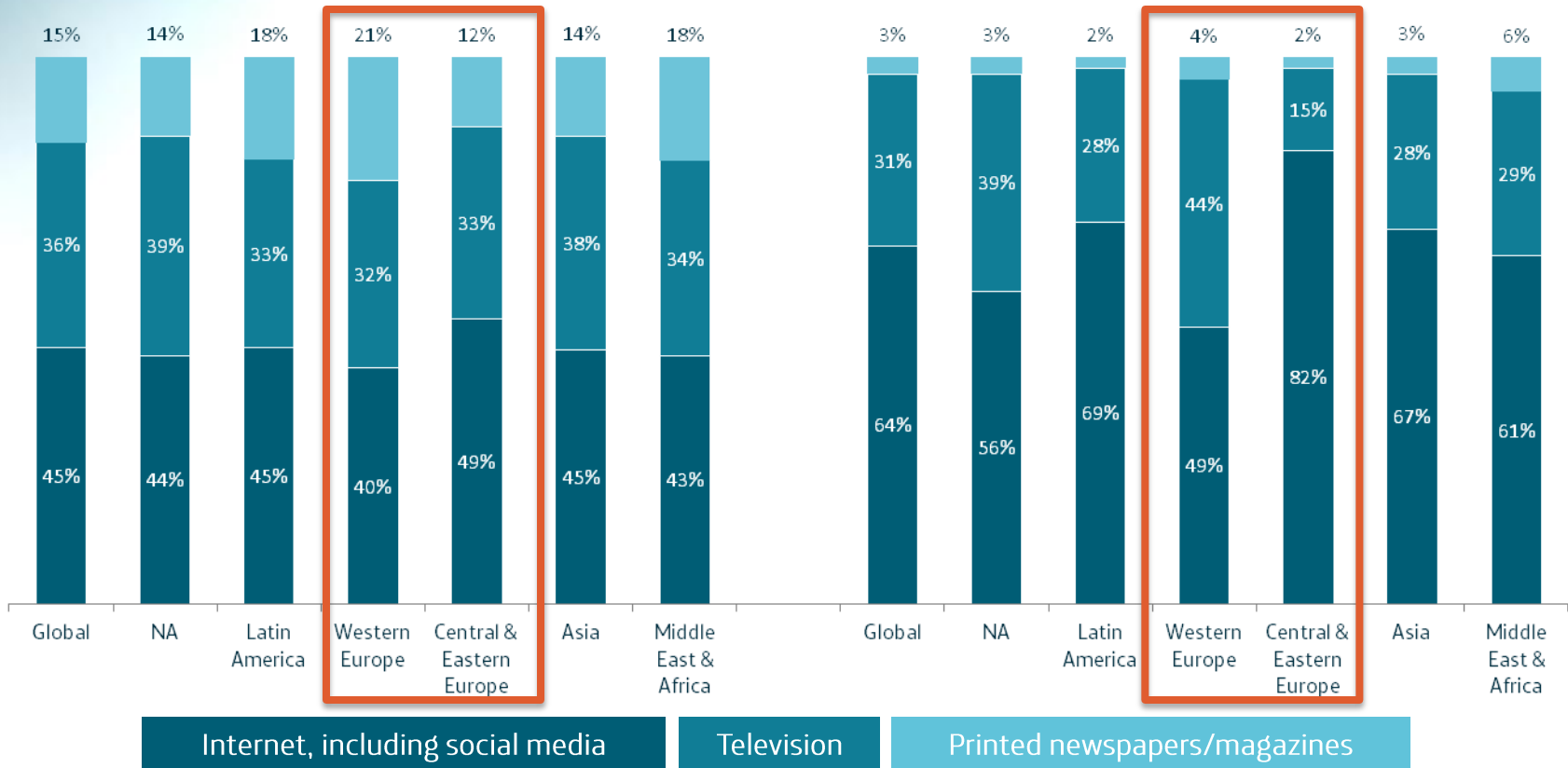
Asia



New Media Trumps The Old For Information And Entertainment

What is the best source for...

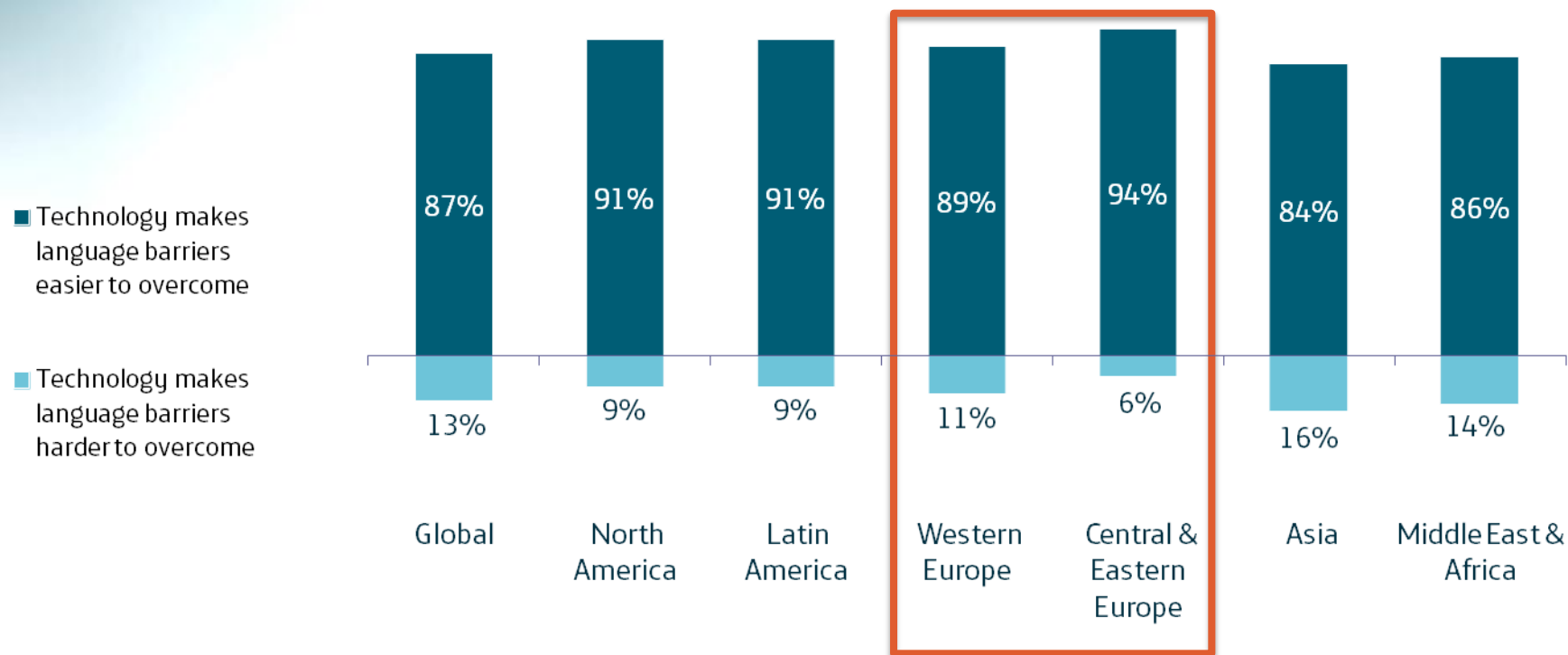
Credible Coverage of News



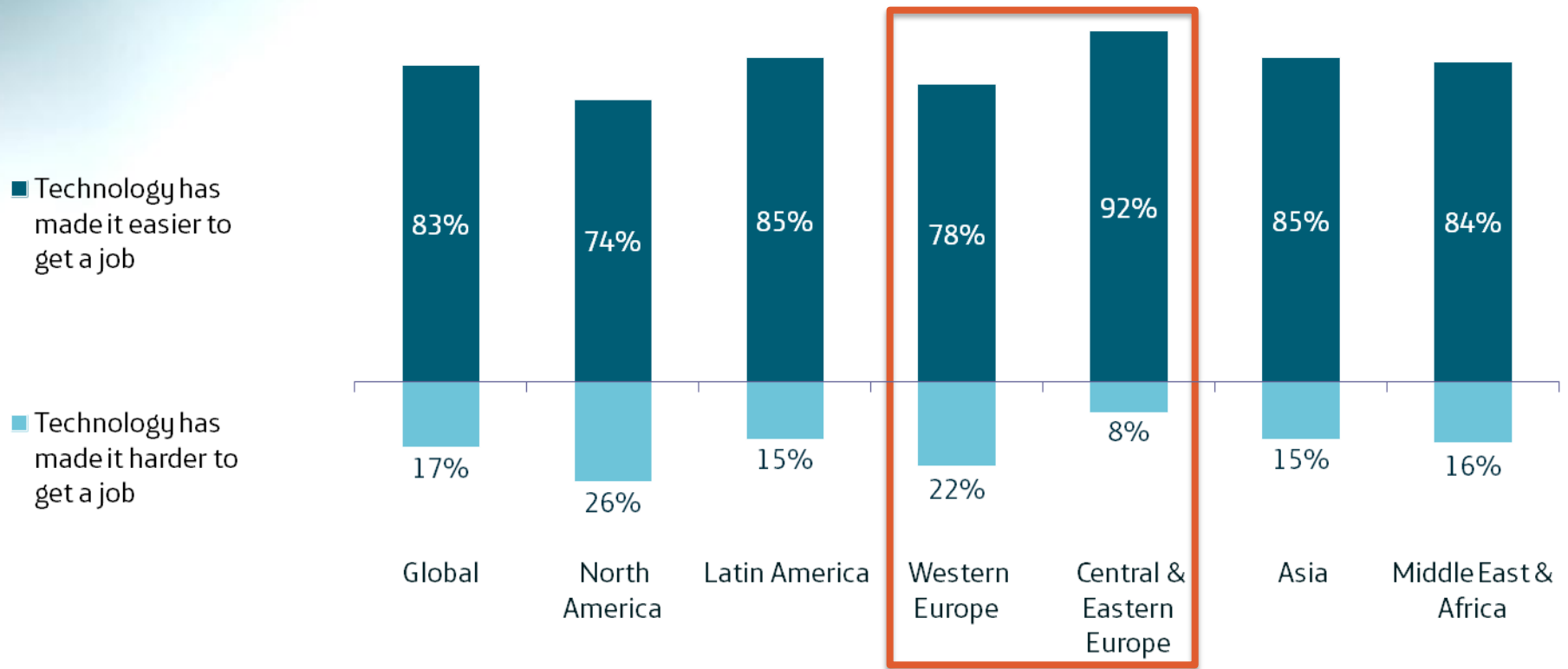
Entertainment

Not showing "Radio"

Technology Makes Language Barriers Easier To Overcome...



...Easier To Get A Job...



...And Creates More Opportunities For All, Rather Than A Select Few

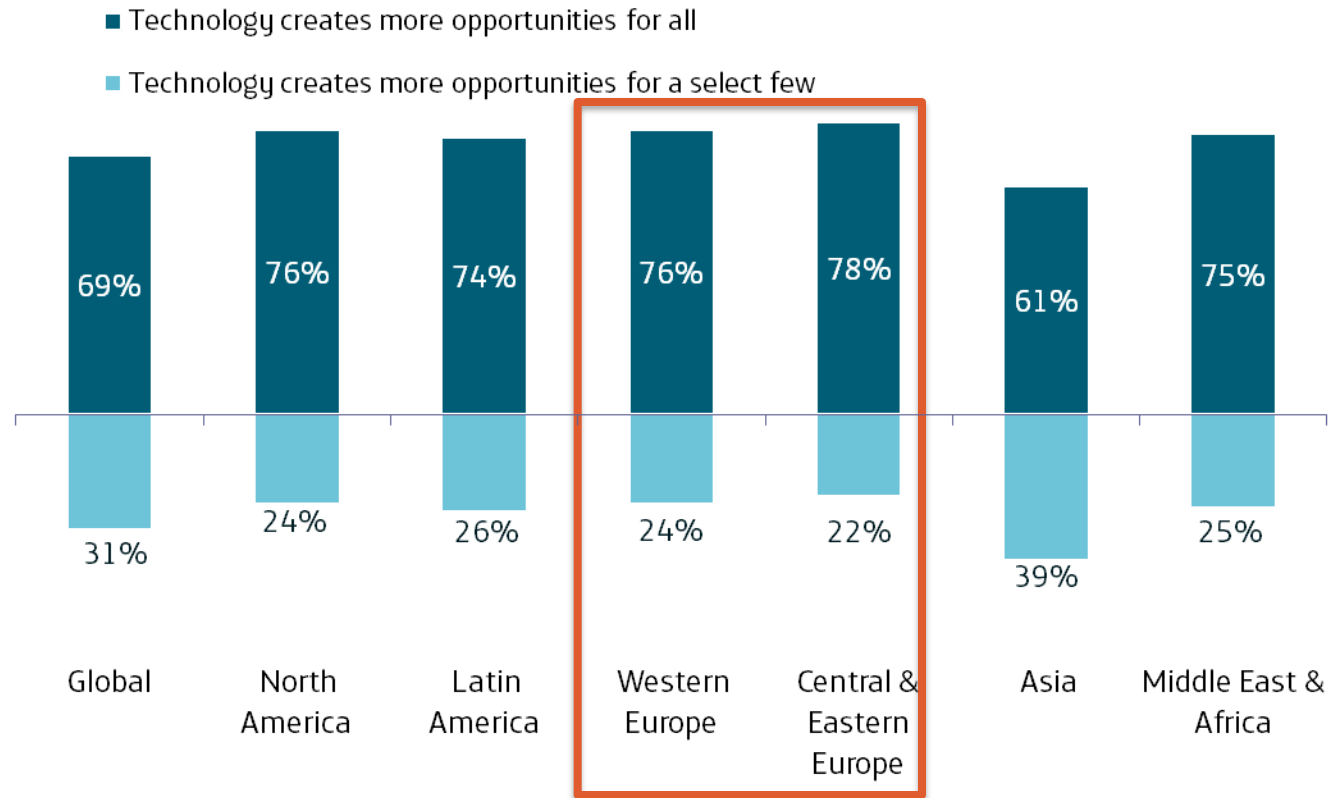
Countries most strongly agreeing with this:

Western Europe

	Germany	81%
	Spain	78%
	Italy	75%
	UK	73%
	France	70%

Central & Eastern Europe

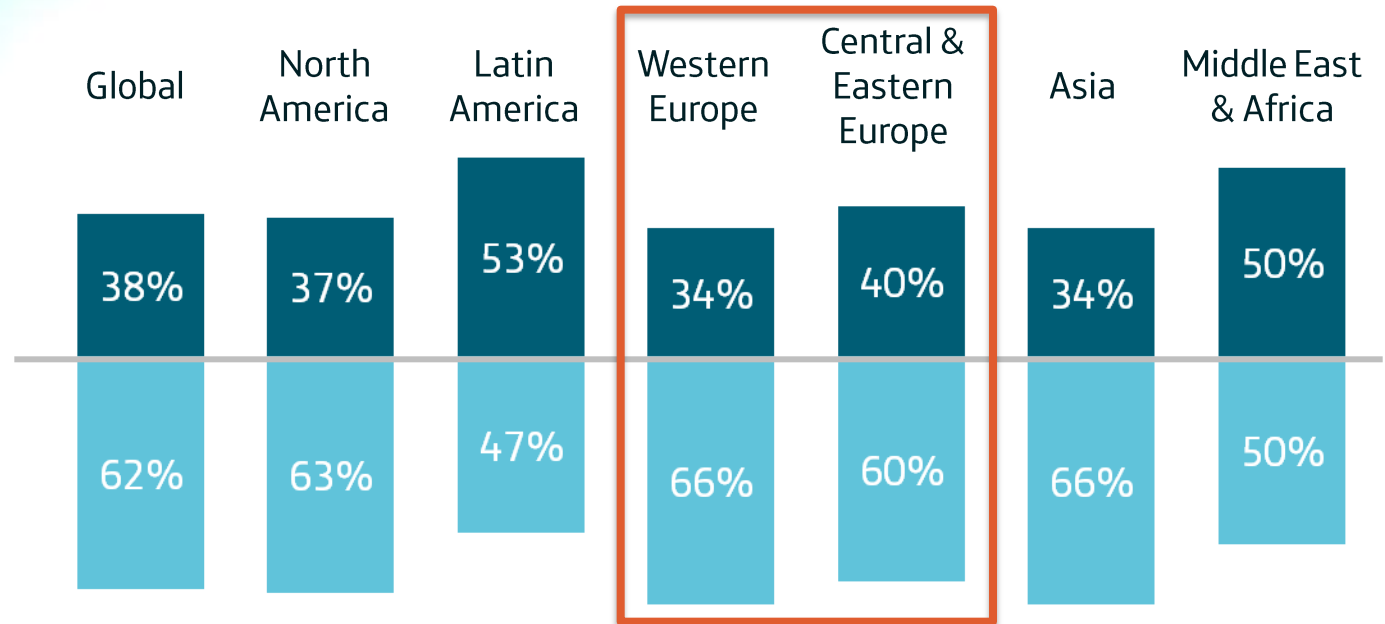
	Russia	78%
	Czech Republic	77%
	Poland	75%



However, Concern That Technology Has Widened The Gap Between The Rich Vs. Poor

■ Technology has shrunk the gap between the rich and the poor

■ Technology has widened the gap between the rich and the poor



Who Believes Technology Has Widened The Gap?

Western Europe

	Germany	77%
	Spain	57%
	Italy	60%
	UK	58%
	France	70%

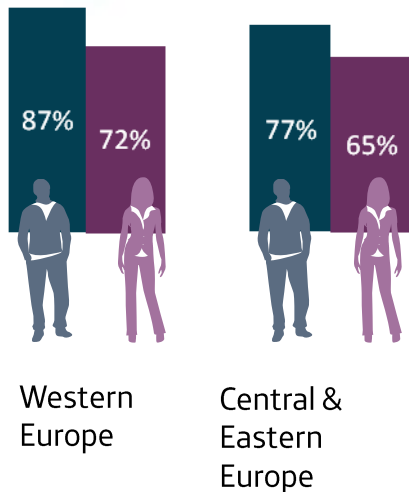
Central & Eastern Europe

	Czech Republic	68%
	Poland	61%
	Russia	58%

Technology Is Also The New Gender Gap

How much do you agree or disagree with the following statement?
I am on the cutting-edge of technology

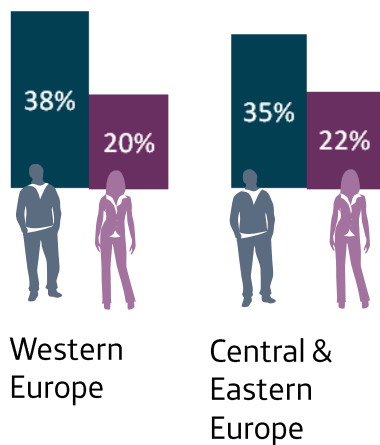
Consider themselves
 “on the cutting-edge
 of technology”



Ranked by Global	Global		North America		Latin America		Western Europe		Central & Eastern Europe		Asia		Middle East & Africa	
Strongly + Somewhat Agree	80	69	87	70	89	83	87	72	77	65	74	63	83	79
Strongly Agree	23	14	29	17	39	25	28	14	23	10	14	11	31	20
Somewhat Agree	57	55	58	53	50	58	59	58	54	55	60	52	52	59
Somewhat Disagree	17	25	12	25	9	13	11	24	20	31	22	29	14	19
Strongly Disagree	3	6	1	5	2	3	2	4	3	5	5	8	3	2

European Millennial Men More Likely To Credit Technology For Having Influenced Their Outlook

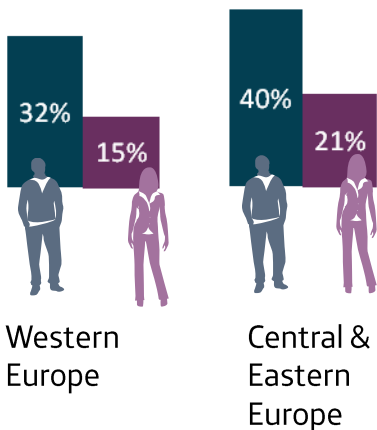
Say “technology” has been **influential** in shaping their outlook on life

















Ranked by Global	Global		North America		Latin America		Western Europe		Central & Eastern Europe		Asia		Middle East & Africa	
Family	81%	88%	81%	86%	84%	93%	81%	90%	82%	88%	83%	89%	67%	72%
School/education	58	64	53	57	65	72	58	66	56	64	60	66	47	57
Friends	54	57	53	61	44	46	66	69	58	56	54	58	41	41
Technology	39	22	43	24	44	22	38	20	35	22	37	20	39	34
Economy	29	30	26	23	22	22	24	23	20	18	34	38	29	27
Religion	15	17	22	32	24	31	11	11	12	13	8	7	43	37

European Millennial Men More Likely To Say An Education In Technology Is Key For Ensuring Future Success

Say “technology” is the **most important** field of study to ensuring personal future success



Ranked by Global	Global		North America		Latin America		Western Europe		Central & Eastern Europe		Asia		Middle East & Africa	
														
Economics	18	21	18	16	17	21	20	20	20	30	17	23	19	20
Foreign Languages	9	16	3	4	11	23	10	19	12	21	10	17	14	20
Science	12	11	15	22	10	11	14	15	10	9	11	7	16	13
Technology	42	29	35	21	44	25	32	15	40	21	49	40	35	25
Mathematics	5	4	6	6	6	4	7	4	7	3	3	2	7	7
Literature	2	4	3	6	2	4	2	4	2	4	2	4	3	4

02

What Makes Millennials Tick?



The Economy Is The Most Important Issue In Europe, Particularly Western Europe

North America

- #1. The Economy: 46%
- #2. Education: 12%

Western Europe

- #1. The Economy: 34%
- #2. Social Inequality: 15%

Central & Eastern Europe

- #1. The Economy: 22%
- #2. Social Inequality: 17%
- #2. Poverty: 17%

Asia

- #1. The Economy: 24%
- #1: Social Inequality: 24%

Middle East & Africa*

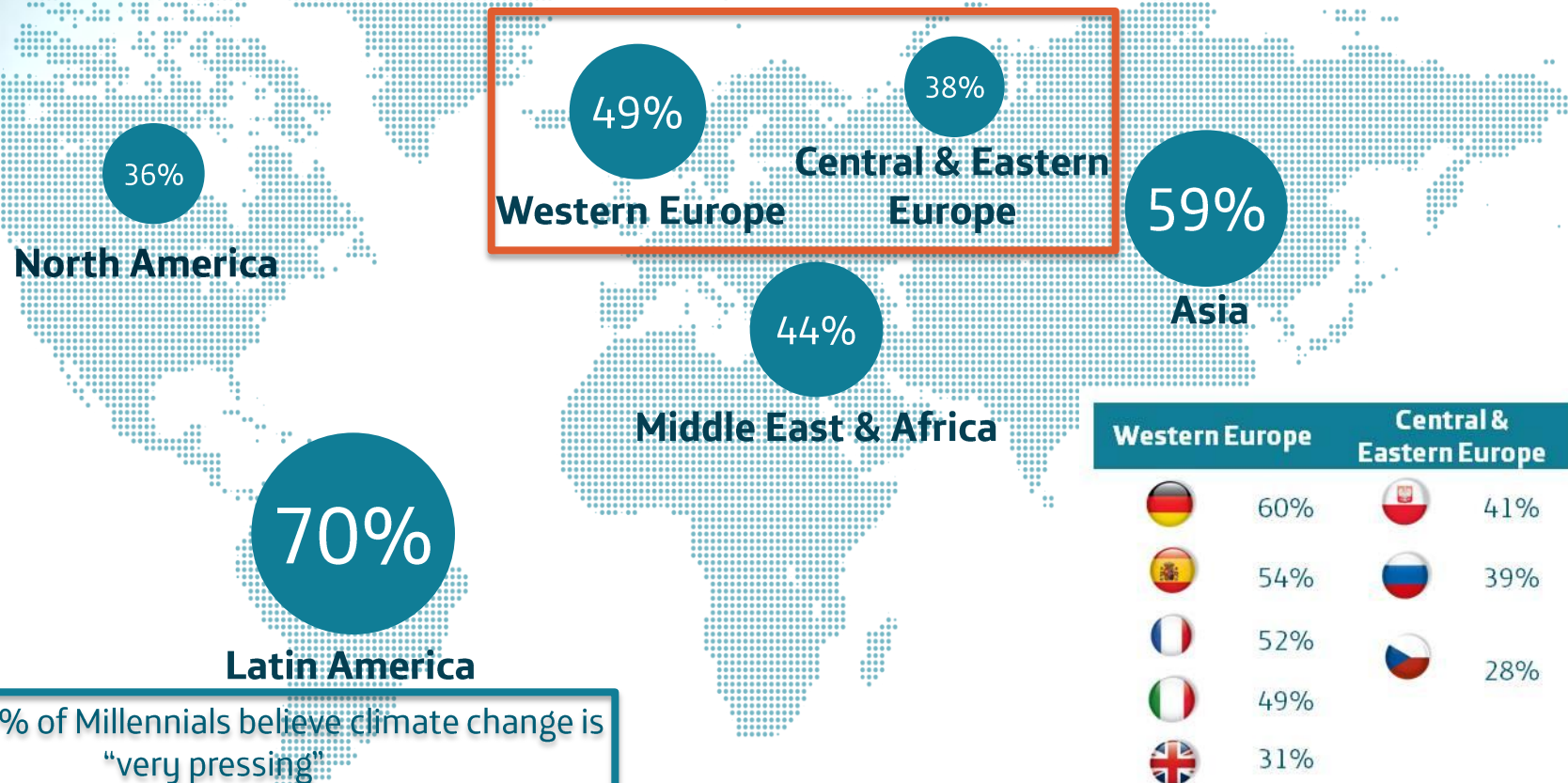
- #1. Terrorism: 19%
- #2. Political Unrest: 13%

Latin America*

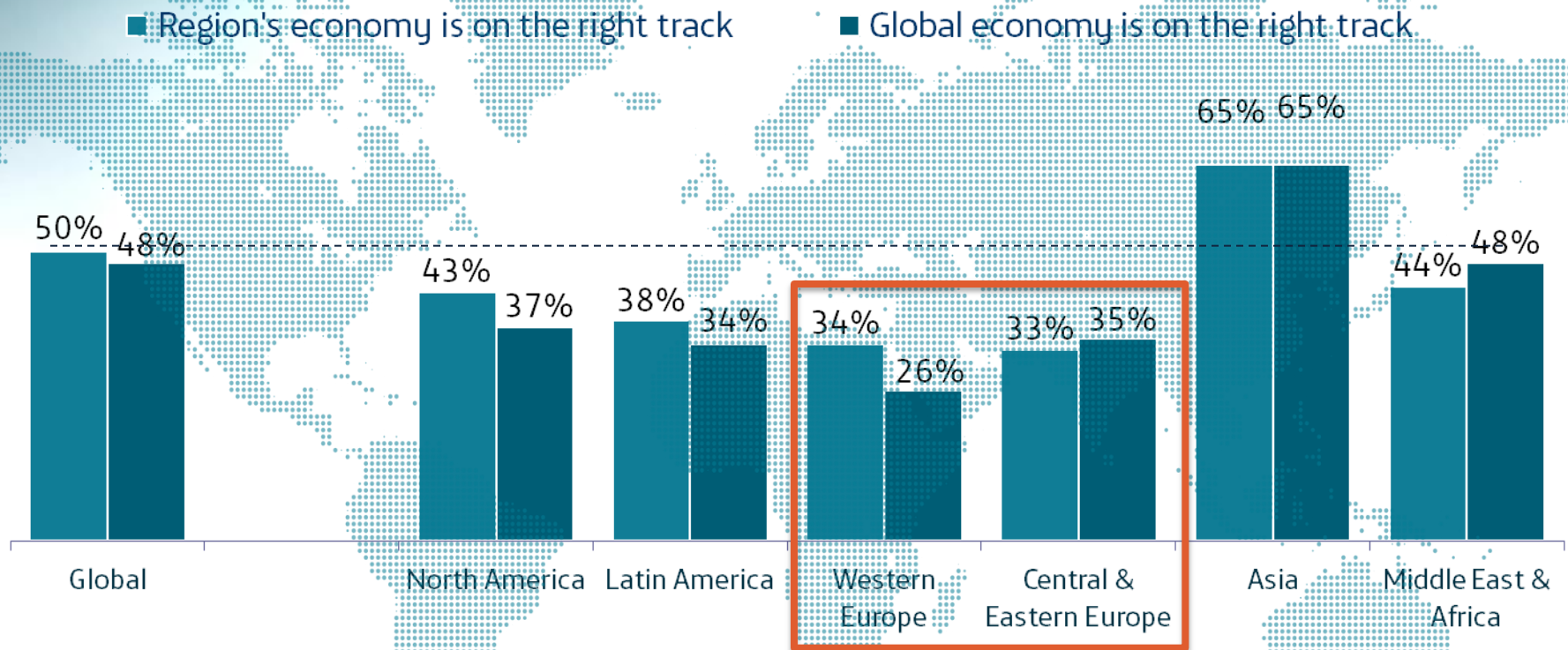
- #1. Social Inequality: 19%
- #1. Education: 19%

*The Economy Ranks:
#4 in LatAm (11%)
#4 in MEA (10%)

Climate Change Is Less Pressing To Central & Eastern Europe Than Western European Millennials

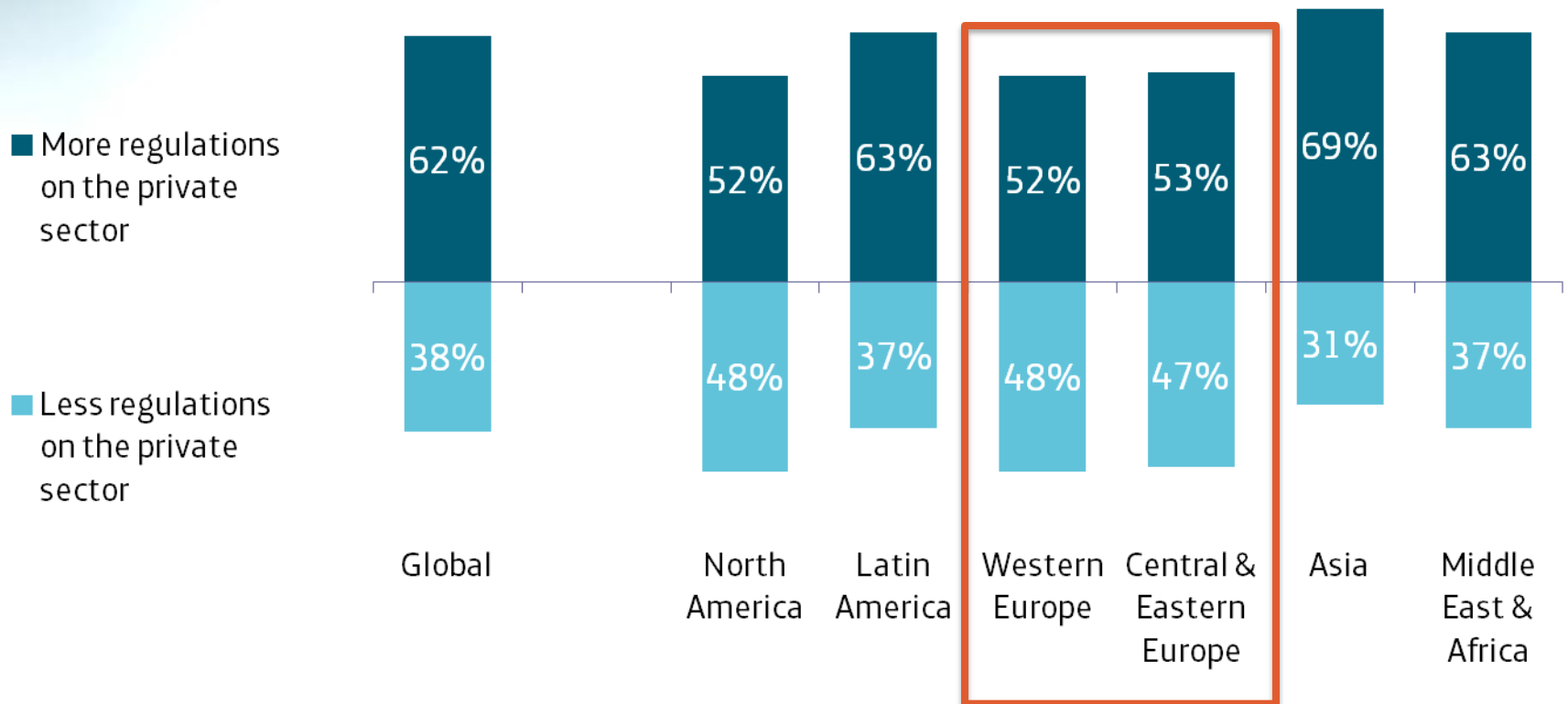


Few European Millennials Believe The Economy Is Headed In Right Direction

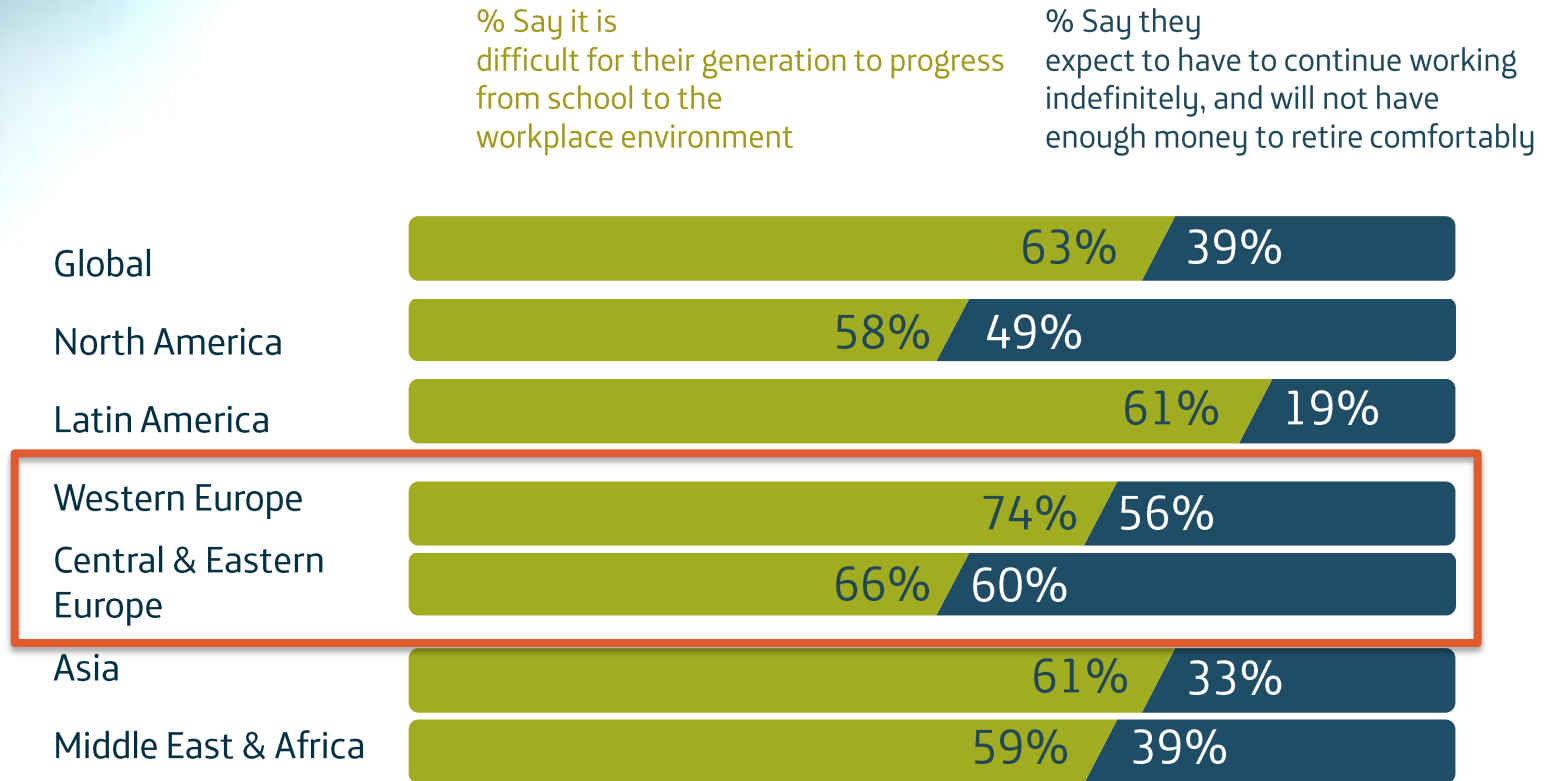


Yet, European Millennials Are Split On Whether Regulations Will Drive Economic Growth

The best way to drive economic growth in my country is through...

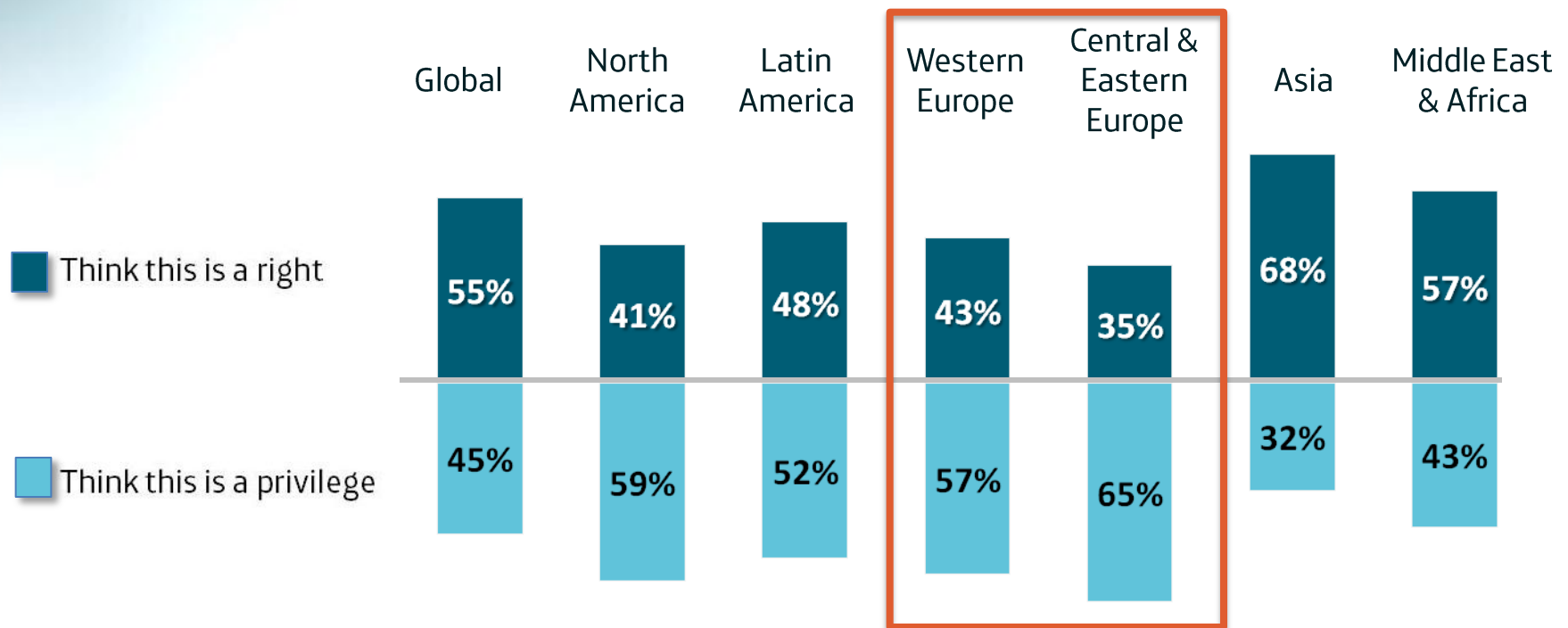


Professional Progression Is Keeping European Millennials Up At Night



European Millennials Don't Believe They Are “Professionally Entitled”

More than half believe a decent paying job is a privilege,” as opposed to a “right”



European Millennials Are Less Devout Than Their Parents...

In Western Europe,

52%

In Central & Eastern Europe,

52%

Say they
are **less devout**
than their parents

	Global	North America	Latin America	Western Europe	Central & Eastern Europe	Asia	Middle East & Africa
More devout	12%	13%	16%	9%	12%	11%	21%
Less devout	51	50	55	52	46	51	43
Equally devout	37	37	29	39	42	38	36

...But Open To Others' Religious Beliefs...

In Western Europe,

75%

In Central & Eastern Europe,

59%

say they are
**open towards
other religions**
and beliefs outside
their own

	Global	North America	Latin America	Western Europe	Central & Eastern Europe	Asia	Middle East & Africa
Very open	37%	38%	46%	37%	21%	36%	39%
Somewhat open	39	40	33	38	38	42	38
Not very open	14	13	13	12	23	13	16
Not at all open	10	10	7	13	17	9	6

...And Would Consider Marrying Someone With Different Religious Beliefs

In Western Europe,

82%

In Central & Eastern Europe

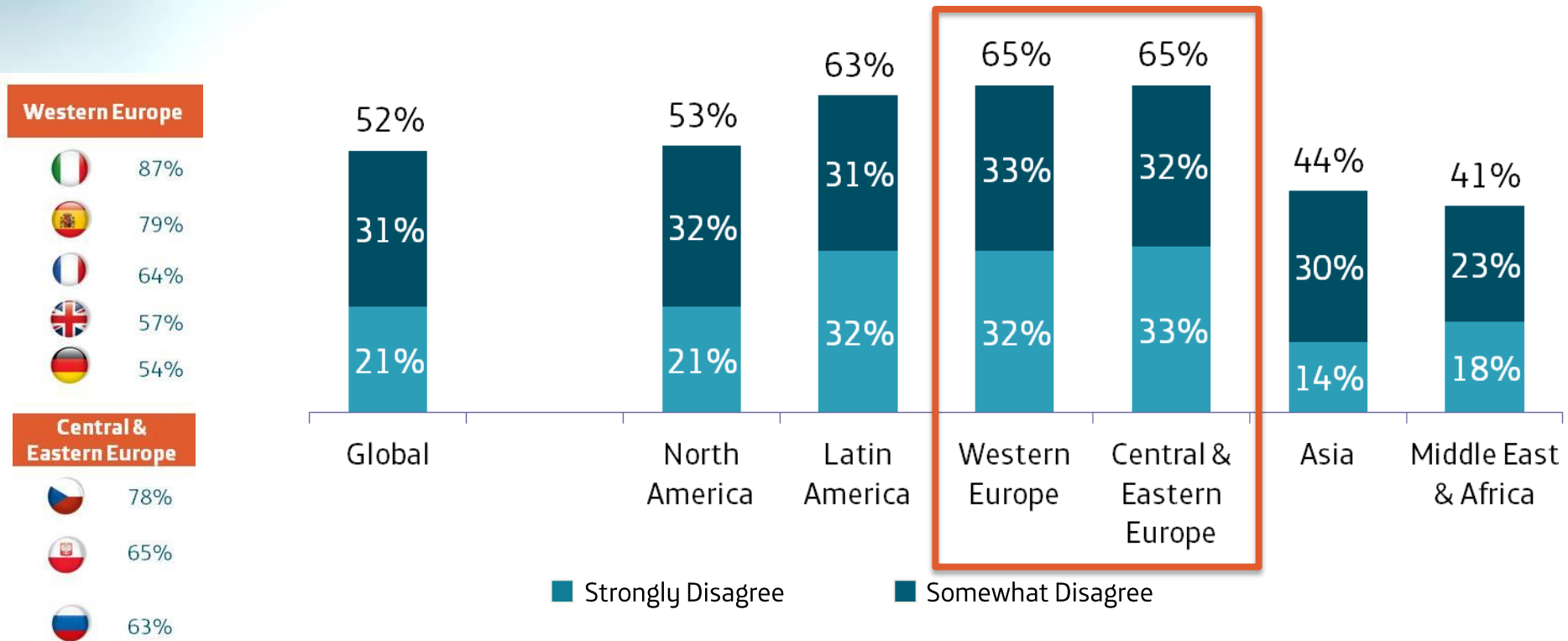
78%

say they
would consider
marrying someone
with different
religious beliefs

	Global	North America	Latin America	Western Europe	Central & Eastern Europe	Asia	Middle East & Africa
Yes	45%	52%	56%	49%	32%	43%	29%
Maybe	35	27	31	33	46	39	27
No	19	20	13	17	22	17	42

European Millennials Say Government Does Not Reflect Their Values and Beliefs

I believe my country's current political system represents my values and beliefs (*Showing Disagree*)



Belief In Change Through Education, Eliminating Poverty And Protecting Environment

% believe the most important way to make a difference is	Global	North America	Latin America	Western Europe	Central & Eastern Europe	Asia	Middle East & Africa
Improving the access to and the quality of education	42%	37%	53%	32%	42%	44%	43%
Protecting our environment	41	29	52	32	39	48	24
Eliminating poverty	39	34	46	45	37	36	43
Providing basic food and shelter to people	24	34	22	27	25	21	23
Promoting sustainable energy	24	20	19	20	12	31	18

The Study Of Choice For Success? Technology

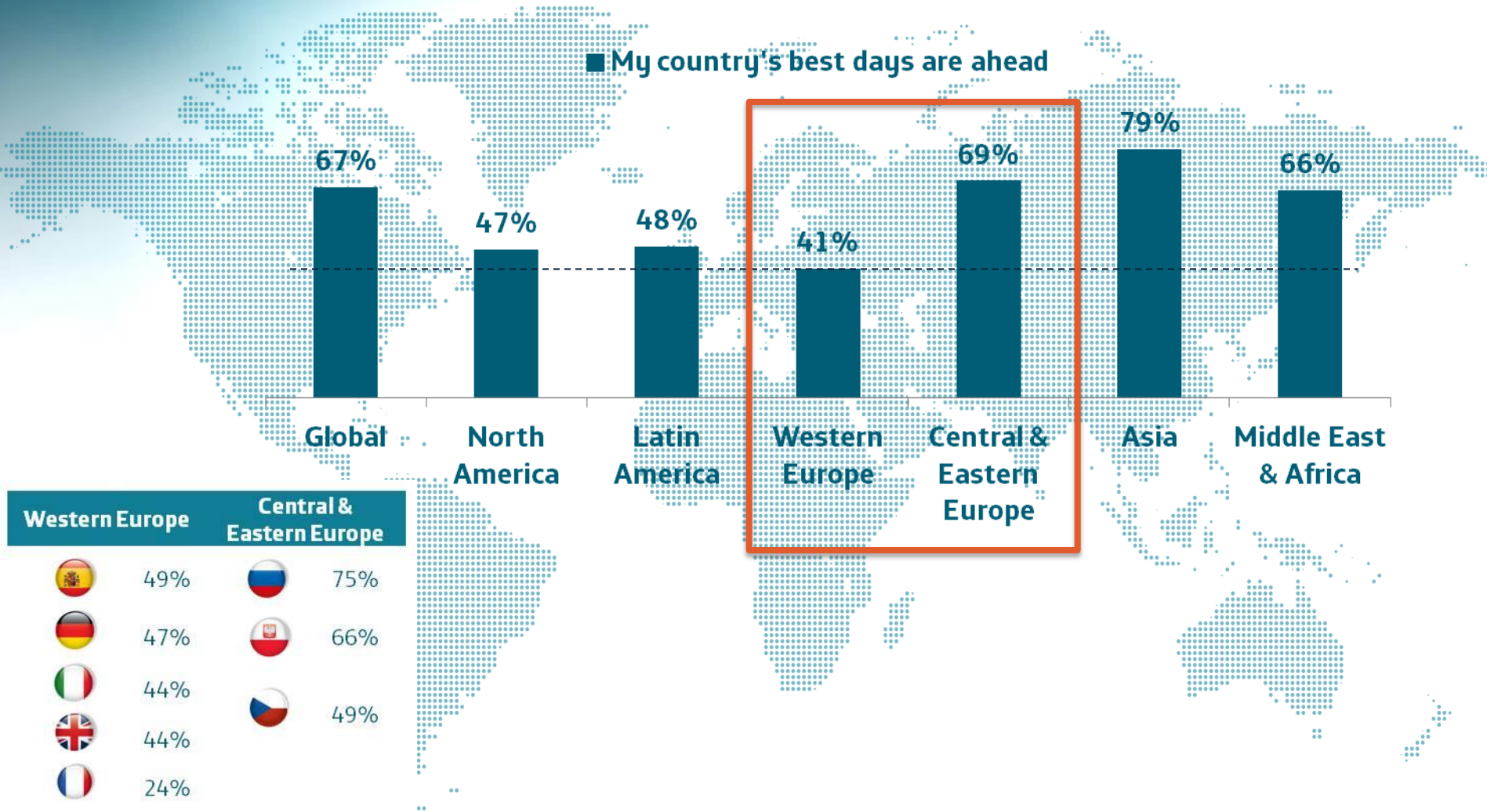
% believe the most important field of study to ensure personal future success	Global	North America	Latin America	Western Europe	Central & Eastern Europe	Asia	Middle East & Africa
Technology	36%	28%	34%	23%	30%	44%	30%
Economics	20	17	19	20	25	20	19
Foreign Languages	13	3	17	15	16	13	17
Science	12	19	10	15	9	9	14
Mathematics	4	7	5	5	5	3	7
Literature	3	4	3	3	3	3	3

03

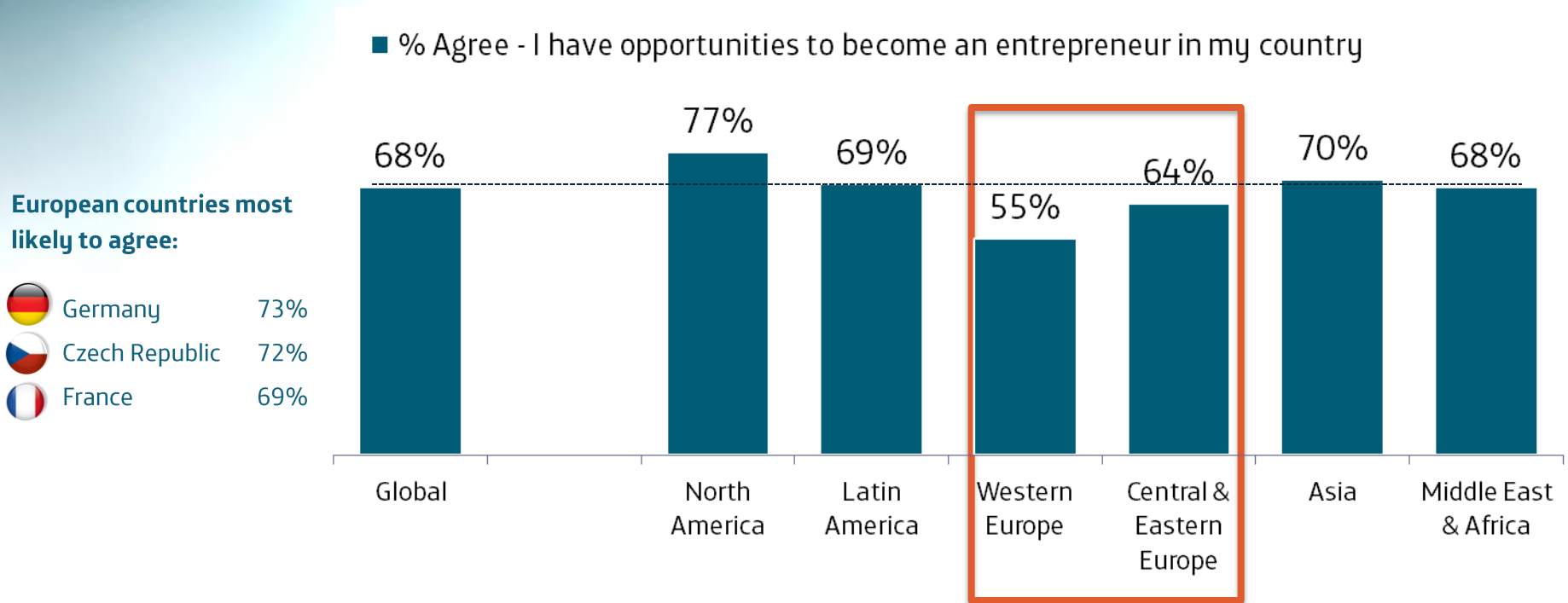
Where Does The
Opportunity Lie?



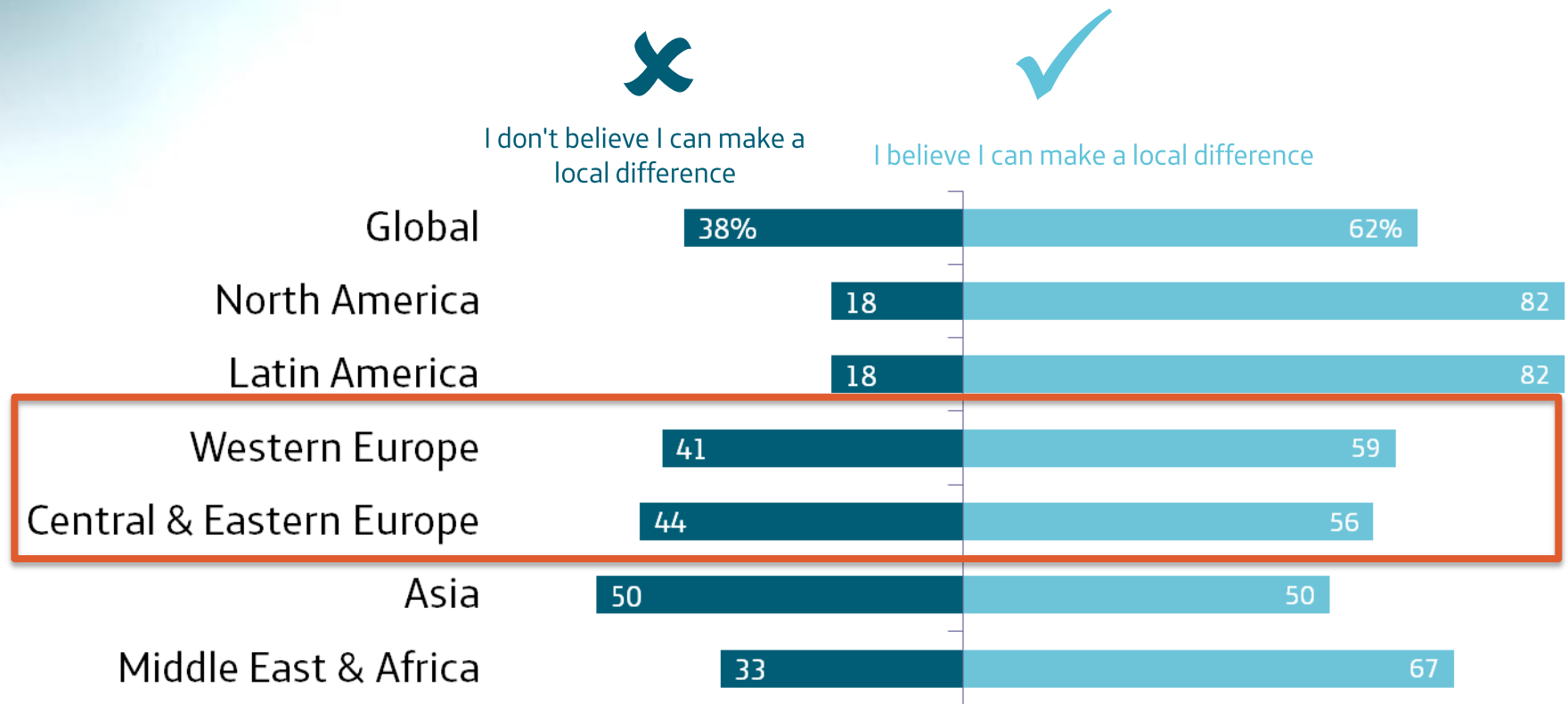
Mixed Feelings Of Optimism Between Western Europe And Central & Eastern Europe



European Millennials Perceive Less Opportunity To Become An Entrepreneur



European Millennials Believe They Can “Make a Local Difference”

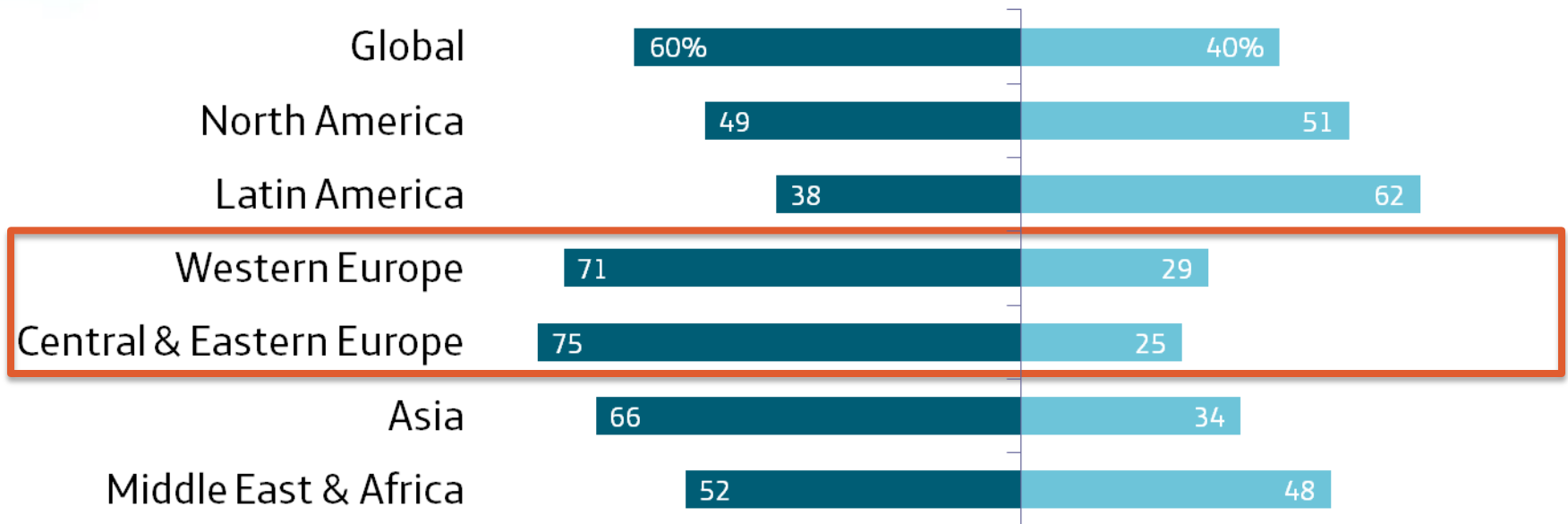


But Are Not Confident About Their Ability To Create Global Change

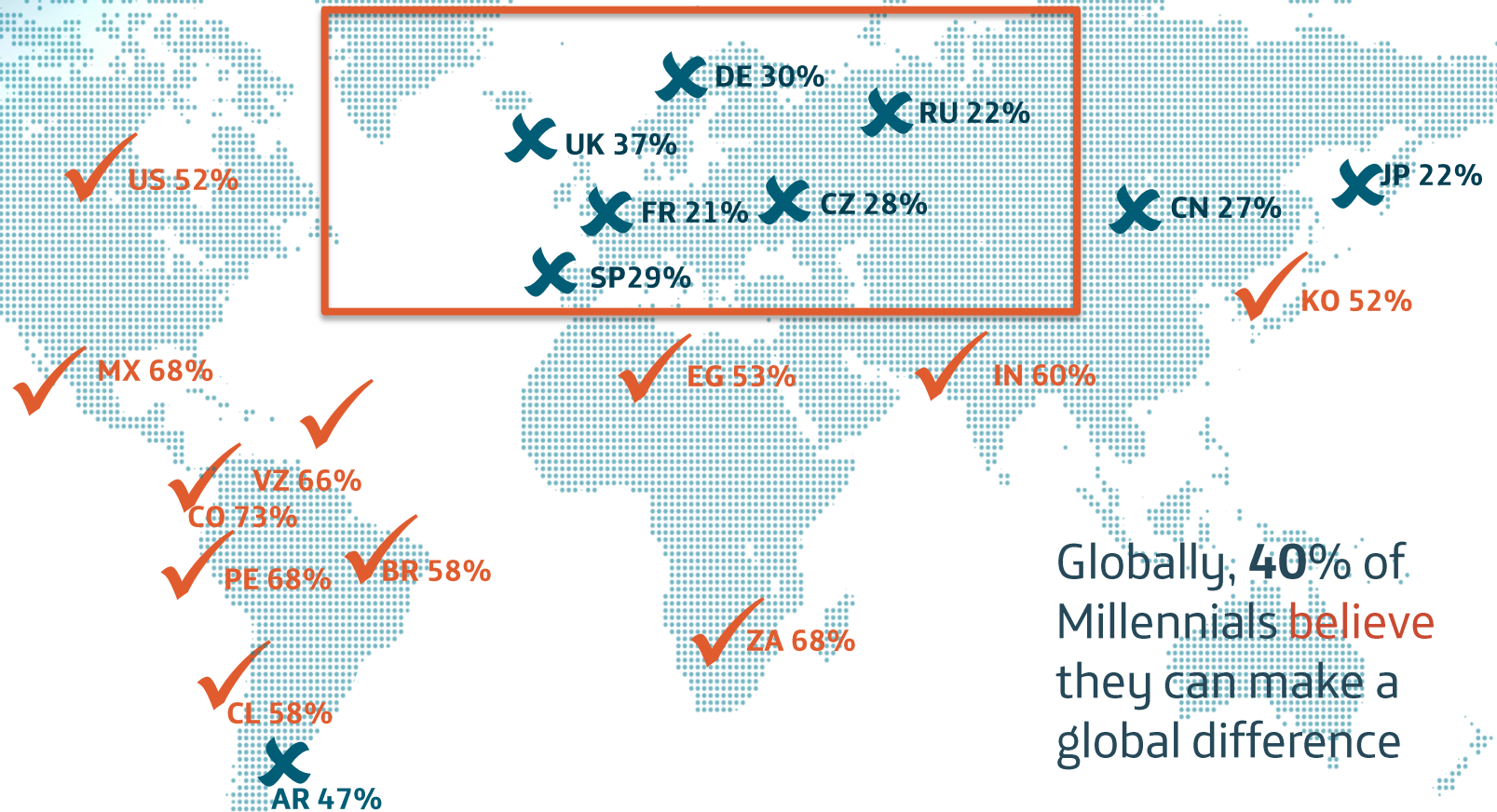


I don't believe I can make a global difference

I believe I can make a global difference

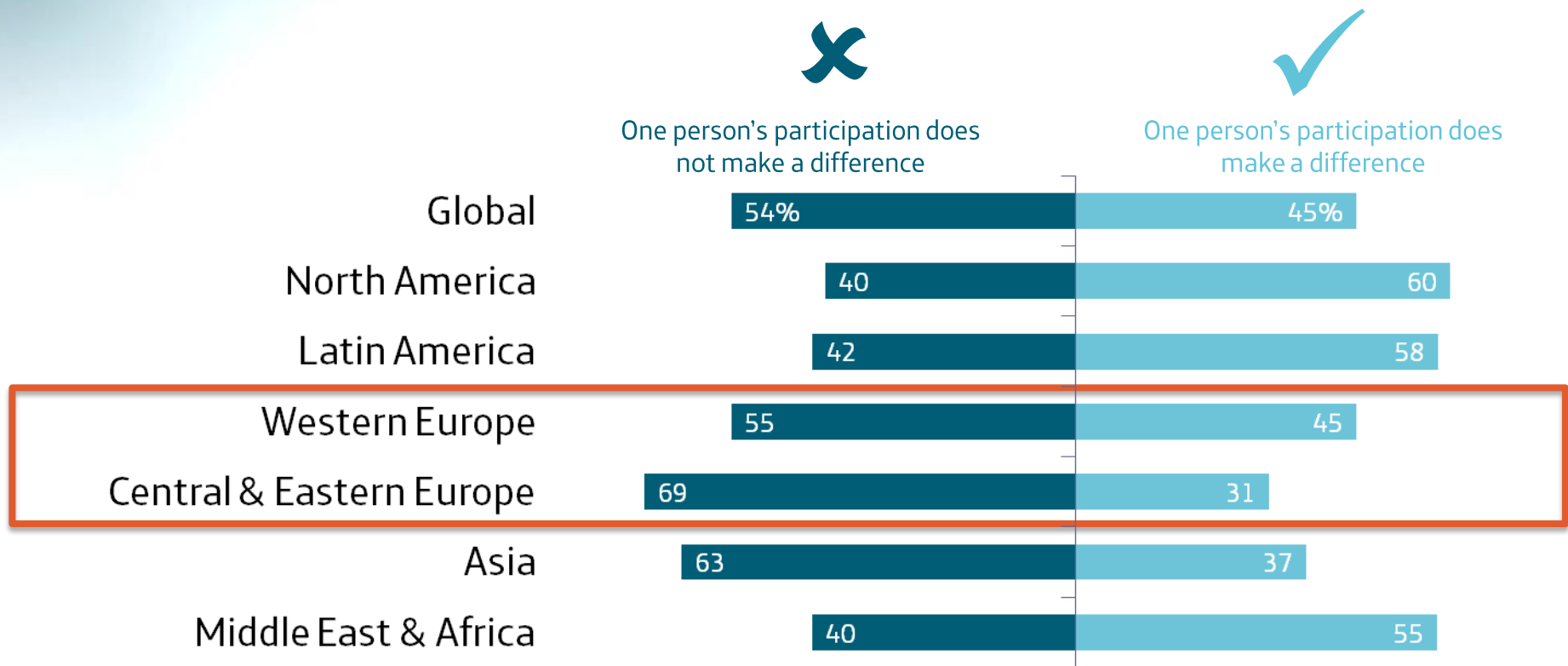


French And Russian Millennials Least Confident In Ability To Create Global Change

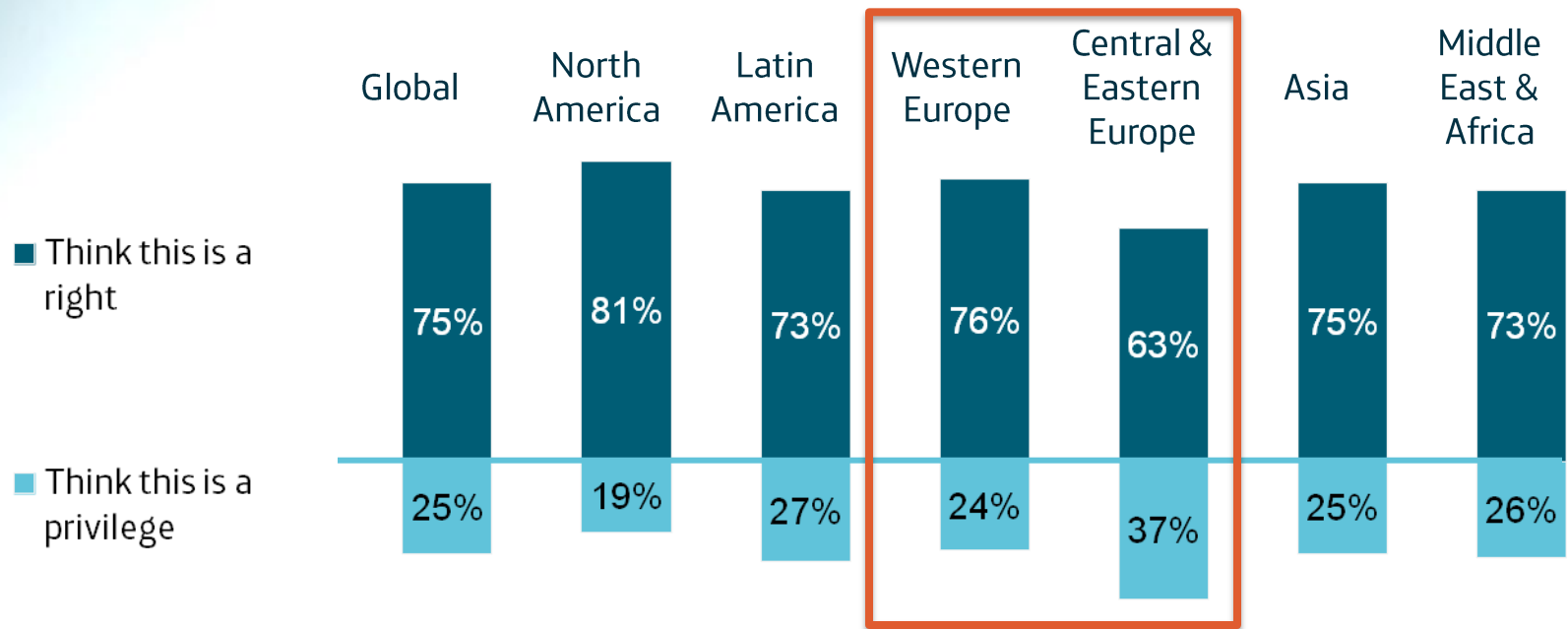


Globally, **40%** of Millennials **believe** they can make a global difference

Also Uncertain About Impact Individual Participation Has In Current Political System



Central & Eastern European Millennials Least Likely To Consider Privacy A Right



04

Introducing: Millennial Leaders_



Millennial Leaders: The Global 11% Who Will Drive Change Through Technology



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.

Millennial Leaders are found at the intersection of:

“Strongly Agree” I am on the cutting-edge of technology

“I 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: Where Are They In The World?

11% of
Global
sample =
Millennial
Leaders

Top 14 Countries	
Country	% of country respondents that are Millennial Leaders
Colombia	27%
Peru	26%
KSA	26%
Chile	22%
Venezuela	22%
India	22%
Mexico	21%
South Africa	20%
Brazil	18%
US	16%
Australia	15%
Poland	14%
Canada	13%
UK	13%

Bottom 13 Countries	
Country	% of country respondents that are Millennial Leaders
Germany	12%
Israel	12%
Argentina	10%
Turkey	10%
Egypt	8%
China	7%
Spain	6%
France	6%
Czech Republic	6%
Russia	6%
Italy	4%
Korea	2%
Japan	1%

9% of
Western
Europe
sample =
Millennial
Leaders

7% of
Central &
Eastern
Europe
sample =
Millennial
Leaders

Global	N Size	MOE
Millennial Leaders	1,600	+/-2.5%

European Millennial Leaders: More Influenced By Technology

Of the following, which three have been the most influential in shaping your outlook on life to date?	Western European Millennials	Western European Millennial Leaders	Central & Eastern European Millennials	Central & Eastern European Millennial Leaders
Family	85%	78%	85%	80%
Friends	67%	60%	57%	42%
School/Education	62%	56%	60%	53%
Technology	29%	46%	29%	50%
Economy	23%	24%	19%	21%
Media	15%	18%	21%	26%
Religion	11%	11%	12%	10%
Government	7%	8%	17%	19%

European Millennial Leaders: Armed with Smartphones; Excellent Comfort Level With Tech

	Western European Millennials	Western European Millennial Leaders	Central & Eastern European Millennials	Central & Eastern European Millennial Leaders
How would you describe your personal knowledge and comfort level with technology?				
“Excellent”	33%	78%	85%	80%
What kind of access do you have to the following technological devices? % say “I own it”				
Smartphone	23%	24%	19%	21%
Laptop	15%	18%	21%	26%
Desktop Computer	11%	11%	12%	10%
Tablet	7%	8%	17%	19%

European Millennial Leaders: Optimistic And Believe In Making A Difference

	Western European Millennials	Western European Millennial Leaders	Central & Eastern European Millennials	Central & Eastern European Millennial Leaders
How optimistic are you about your future?				
“Very Optimistic”	18%	39%	21%	38%
In general, do you think your country’s best days are ahead, or behind?				
“My country’s best days are ahead”	41%	58%	69%	83%
Do you believe you can make a global difference?				
“I believe I can make a global difference”	29%	61%	25%	59%

European Millennial Leaders: Career-Oriented

	Western European Millennials	Western European Millennial Leaders	Central & Eastern European Millennials	Central & Eastern European Millennial Leaders
How important or unimportant are each of the following life accomplishments to you personally?				
"Making it to the top of your career" (very important)	33%	51%	26%	40%
In your opinion, how easy or difficult is it for your generation to progress from school to the workplace environment?				
"Easy" (very and somewhat easy)	27%	52%	35%	62%

European Millennial Leaders: Civically Engaged, Empowered To Drive Change Through Technology

	Western European Millennials	Western European Millennial Leaders	Central & Eastern European Millennials	Central & Eastern European Millennial Leaders
How often do you participate in your country's political process (e.g. voting)?				
"Always participate"	34%	50%	27%	44%
Technology has made me better informed about political issues in my country				
"Strongly agree"	29%	52%	39%	54%
Social media plays an important role in my current political events and movements in my country				
"Strongly agree"	24%	45%	23%	39%
Technology has made my government more transparent				
"Strongly agree"	12%	30%	14%	31%

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