



Telefónica Global Millennial Survey: Global Results_

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Telefonica

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.



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.

Demographics

Gender_

Male	50%
Female	50%

Age_

18-24	53%
25-30	47%

Employment Status_

Employed	55%
Student	31%
Not Currently Employed	11%
Other	4%

Marital Status_

Single	66%
Married	23%
Other	11%

Parental Status_

Kids	26%
No Kids	72%
Prefer not to say	2%

Education_

Less than college	40%
College educated	60%

Key Themes

1 Me, Myself and Technology

Millennials are defined by their ubiquitous use of technology and belief that an education in technology will ensure personal future success. However, technology is the new gender gap as Millennial men and women value the role and impact of technology differently in their lives .

2 What makes Millennials tick?

Millennials are concerned about the health of the economy as well as the planet. Many do not believe their views and beliefs are adequately represented by their governments. They believe strongly in protecting personal freedoms and are tolerant of other religious beliefs.

3 Where does the opportunity lie?

Millennials value entrepreneurship, believe they can make a local difference, but express concern about the progression from school to the workplace. Over half of global Millennials predict China will drive the global economy in the next 10 years.

4 Millennial Leaders

The Millennial Leaders are the 11% 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.

01

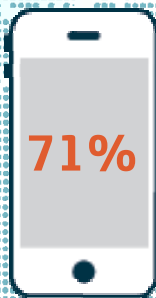
Me, Myself and Technology



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



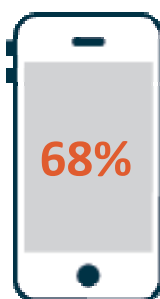
Laptop	64%
Desktop	56%
Tablet	23%

Asia



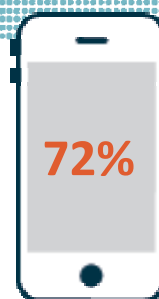
Laptop	77%
Desktop	49%
Tablet	31%

Latin America



Laptop	62%
Desktop	58%
Tablet	22%

Middle East & Africa



Laptop	66%
Desktop	45%
Tablet	20%

Global smartphone penetration
in 2011: 30%*

Constantly Connected, Constantly Online

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

North America

7
hours

Western Europe

5
hours

Central & Eastern Europe

6
hours

Asia

6
hours

Latin America

7
hours

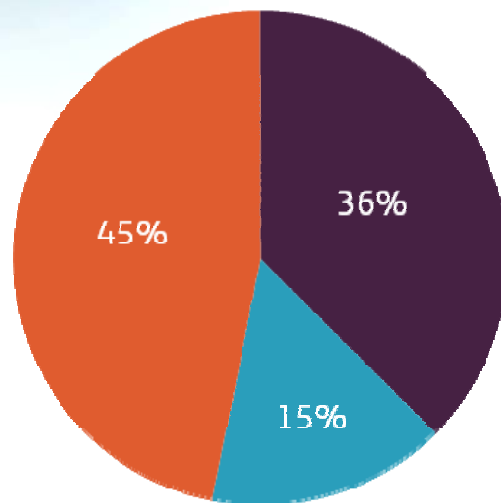
Middle East & Africa

5
hours

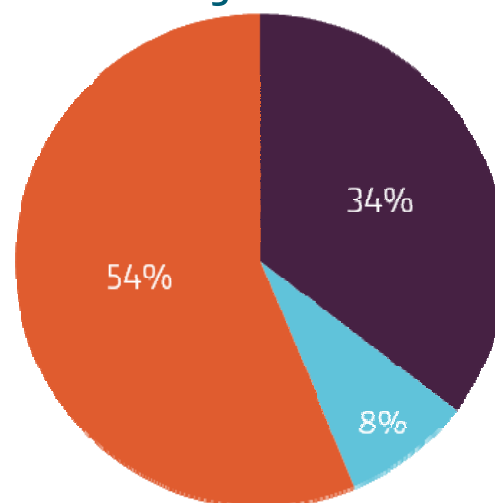
New Media Trumps The Old For Information And Entertainment

What is the best source for...

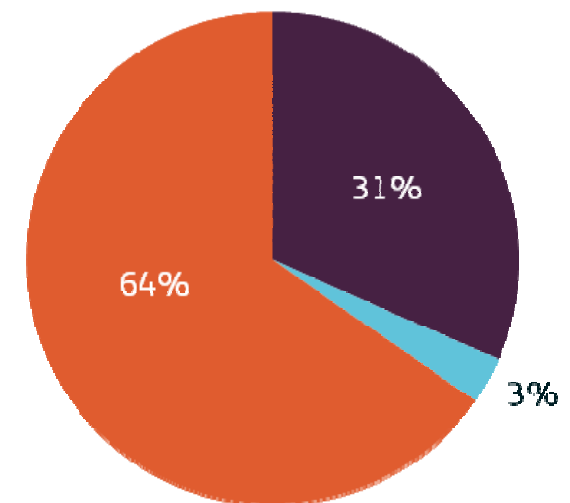
Credible coverage
of news



A developing news
story or crisis



Entertainment



Internet, including social media

Television

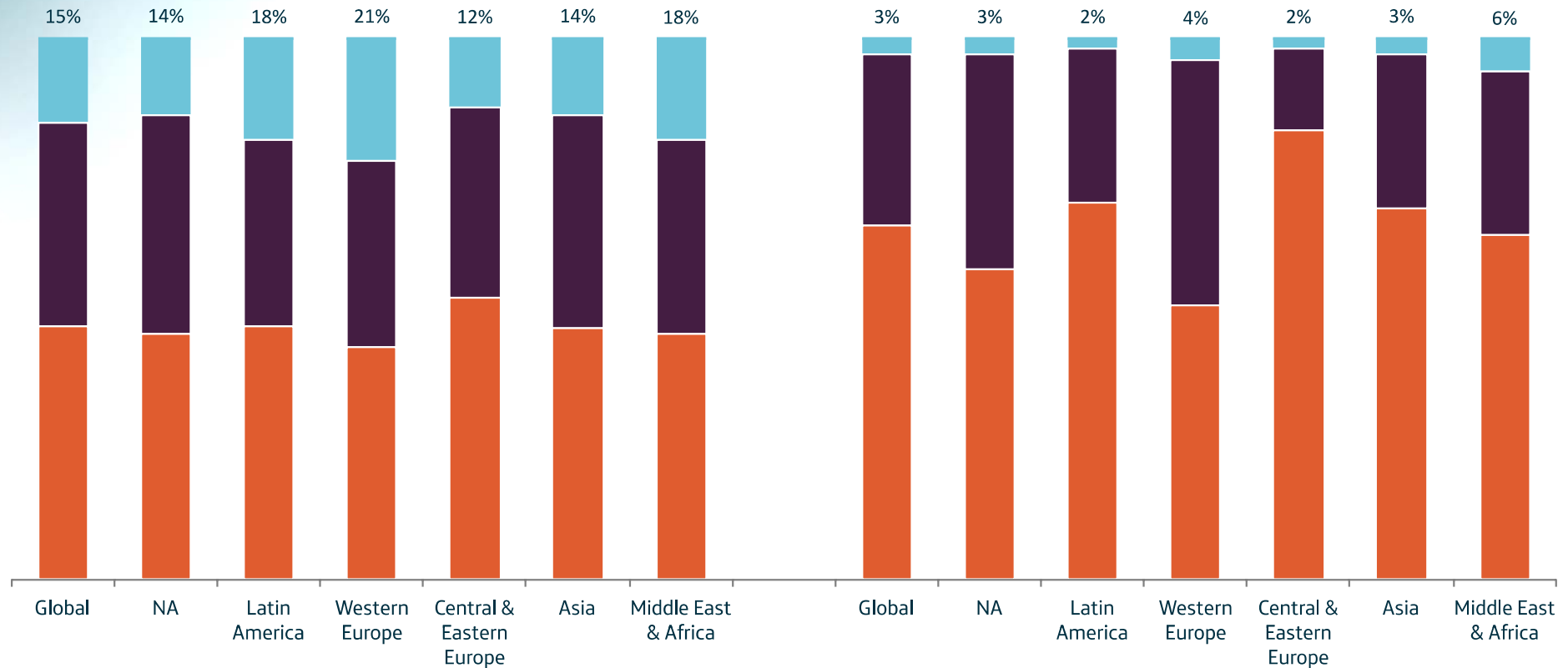
Printed newspapers/magazines

Not showing "Radio"

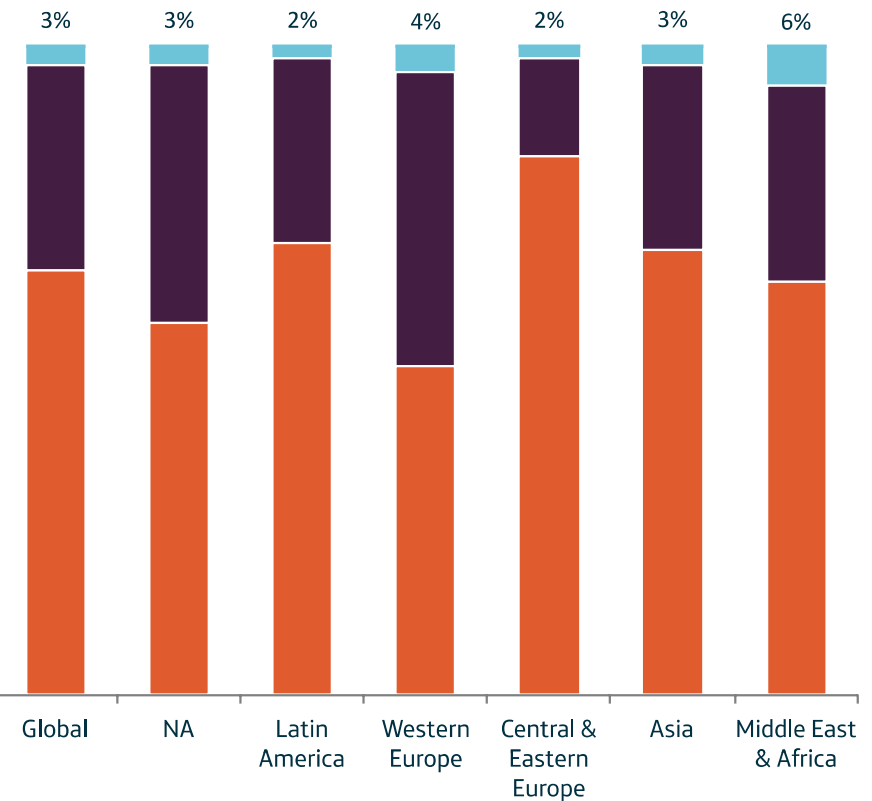
True Across Regions...

What is the best source for...

Credible coverage of news



Entertainment



Internet, including social media Television Printed newspapers/magazines

Not showing "Radio"

Technology Creates Opportunity...

Millennials believe technology can create opportunities for individuals

87%
say

“technology has made language barriers easier to overcome”

“technology creates more opportunities for all” as opposed to “a select few”

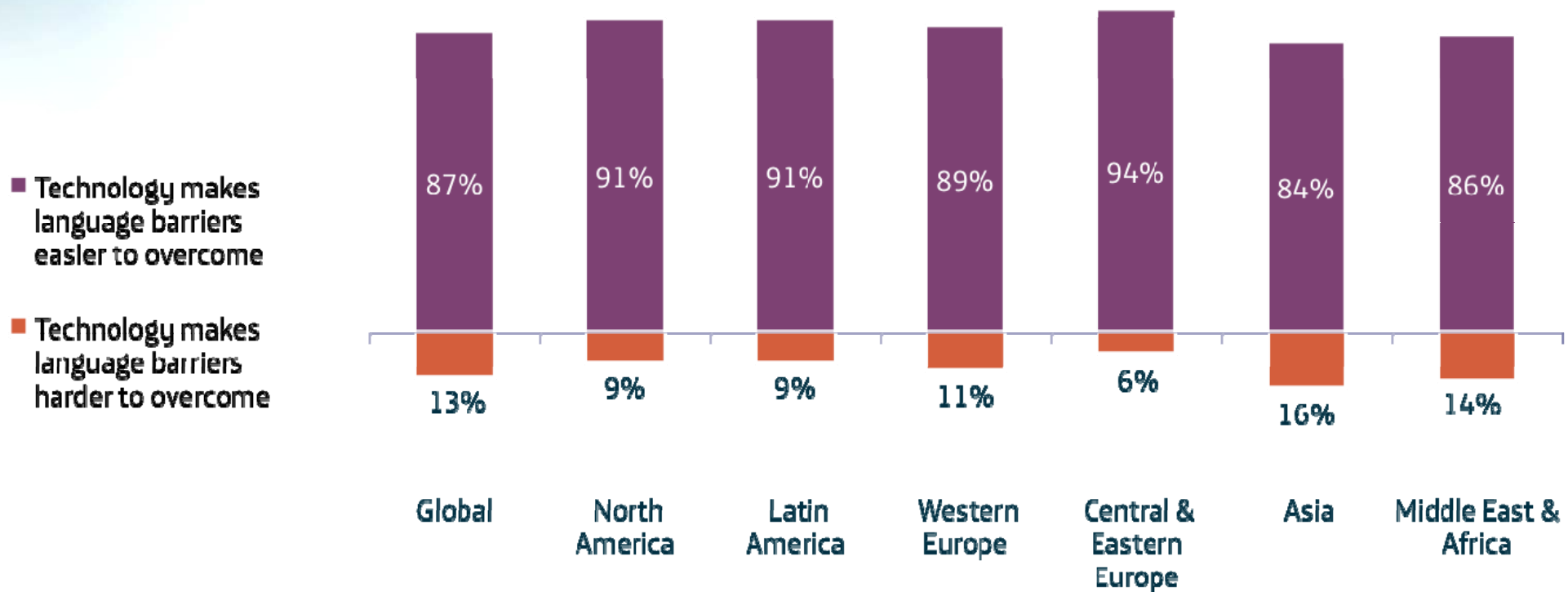
69%
say

“technology has made it easier to get a job”

83%
agree

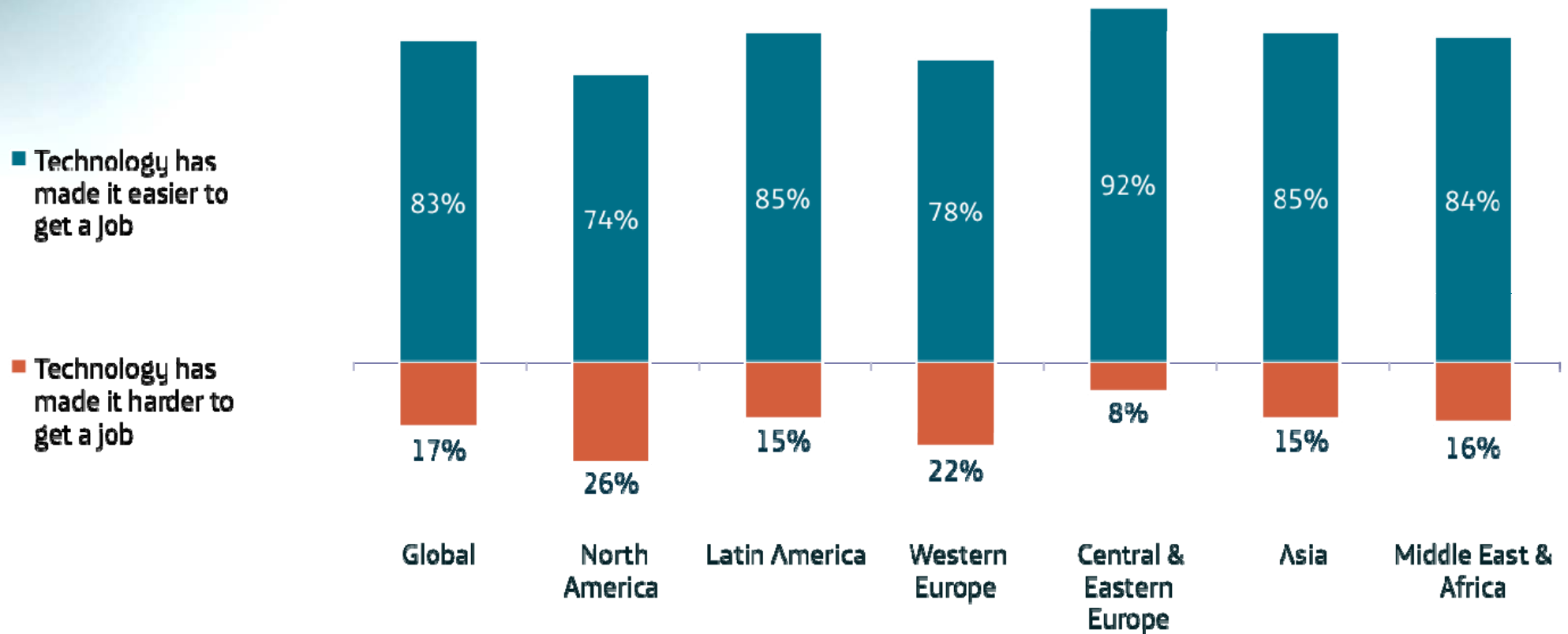
Overcoming Language Barriers

Which of the following statements most closely represents your opinion on language barriers in the digital age?



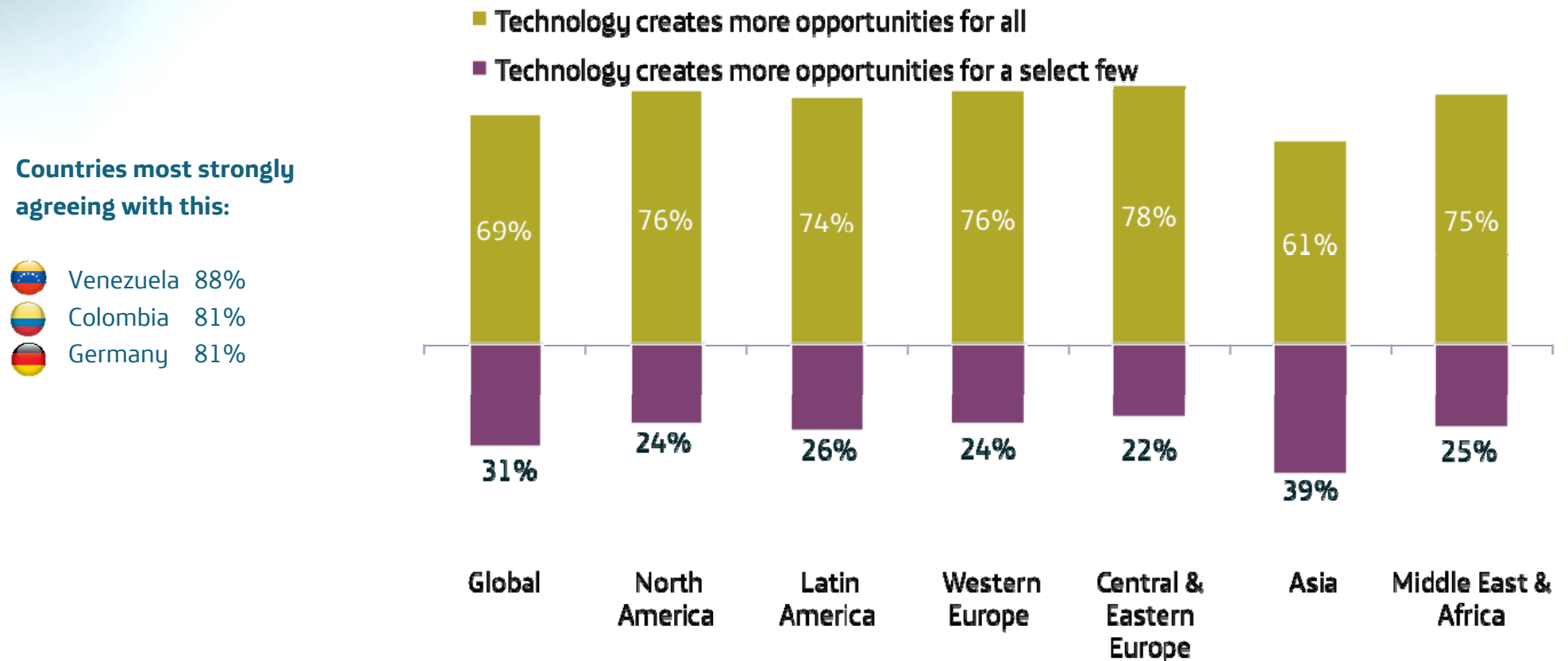
And Making It Easier To Get A Job...

Which statement about jobs and technology do you agree with more?



...Creating Opportunities For All, Rather Than A Select Few

Which statement about opportunities and technology do you agree with more?



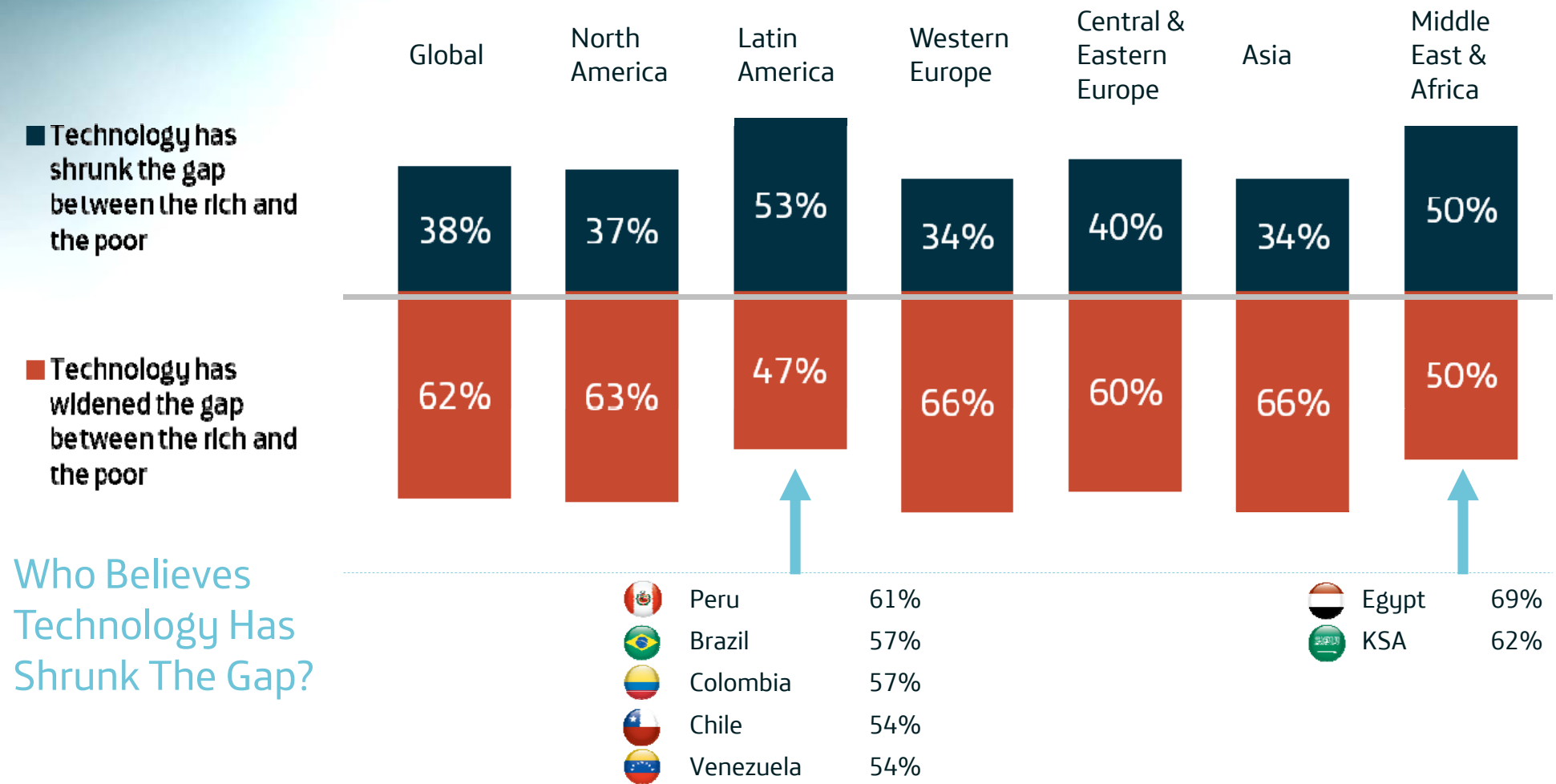
However, Technology Is Not An Equalizer

But they also believe technology has widened the gap between the rich and the poor

62%
say

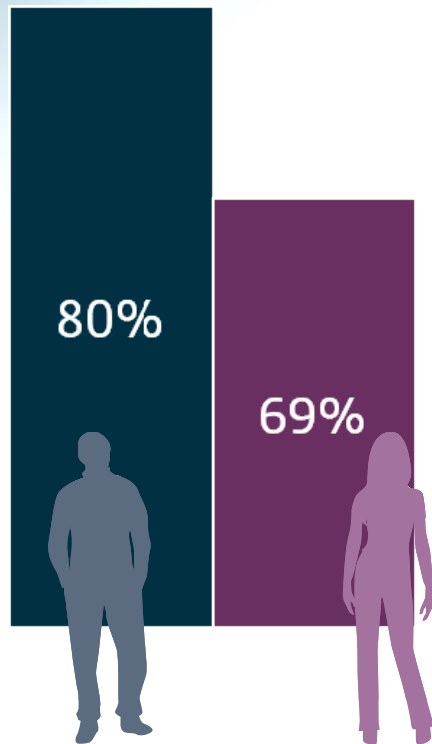
“technology has
widened the gap
between the rich
and the poor”

Concerns About The Rich vs. Poor Exist Across Regions Except In Latin America and Middle East & Africa



Technology Is Also The New Gender Gap

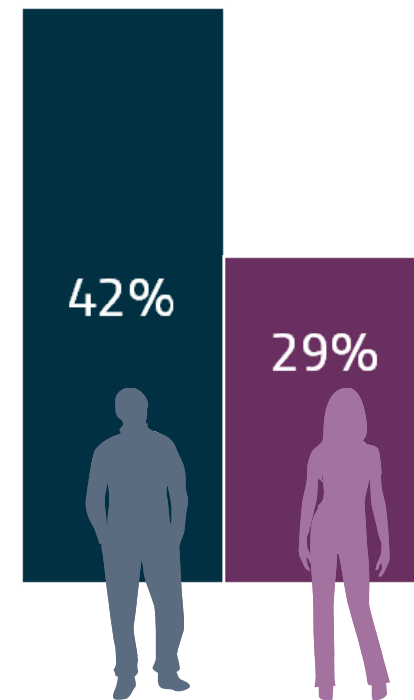
Consider themselves
“on the cutting-edge
of technology”



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



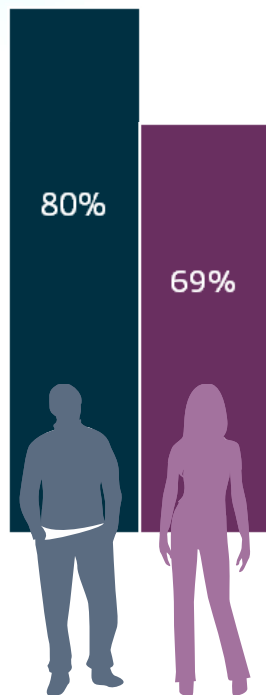
Say “technology” is the most
important field of study to
ensuring future success



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”

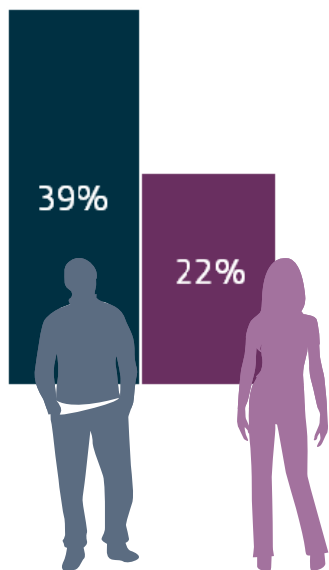








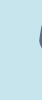
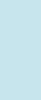






Ranked by Global	Global		North America		Latin America		Western Europe		Central & Eastern Europe		Asia		Middle East & Africa	
Strongly + Somewhat agree	80%	69%	87%	70%	89%	83%	87%	72%	77%	65%	74%	63%	83%	79%
Strongly Agree	23	14	29	17	39	25	28	14	23	10	14	11	31	20
Somewhat Agree	57	55	58	53	50	58	59	58	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

Technology Is Also The New Gender Gap

Of the following, which three have been the most influential in shaping your outlook on life to date?

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

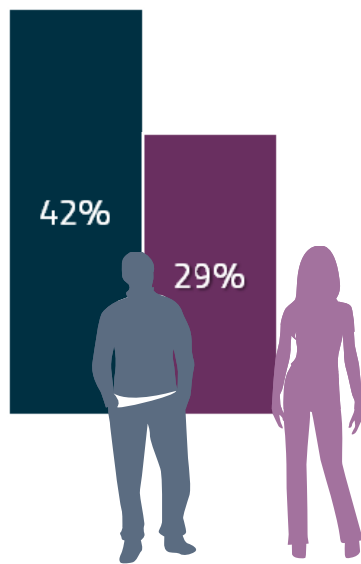
















Ranked by Global	Global		North America		Latin America		Western Europe		Central & Eastern Europe		Asia		Middle East & Africa	
														
Family	81 %	88 %	81 %	86 %	84 %	93 %	81 %	90 %	82 %	88 %	83 %	89 %	67 %	72 %
School/education	58	64	53	57	65	72	58	66	56	64	60	66	47	57
Friends	54	57	53	61	44	46	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

Technology Is Also The New Gender Gap

Which field of study do you believe is most important for ensuring your personal future success?

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



Ranked by Global	Global		North America		Latin America		Western Europe		Central & Eastern Europe		Asia		Middle East & Africa	
														
Technology	42%	29%	35%	21%	44%	25%	32%	15%	40%	21%	49%	40%	35%	25%
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
Mathematics	5	4	8	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 Outside Of Latin America And Middle East & Africa

The most important issue facing the region where you live

Western Europe

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

North America

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

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%

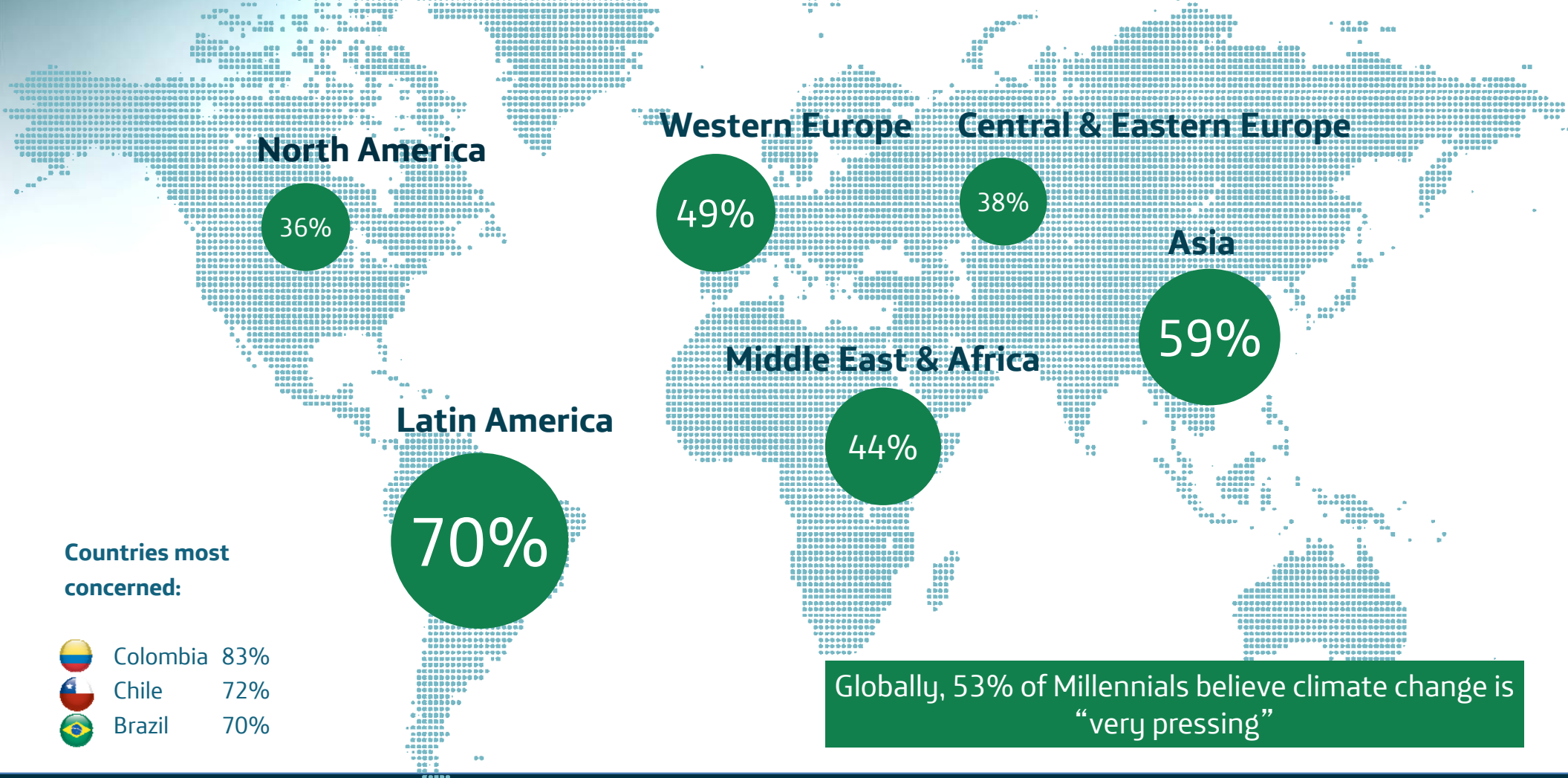
Latin America*

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

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

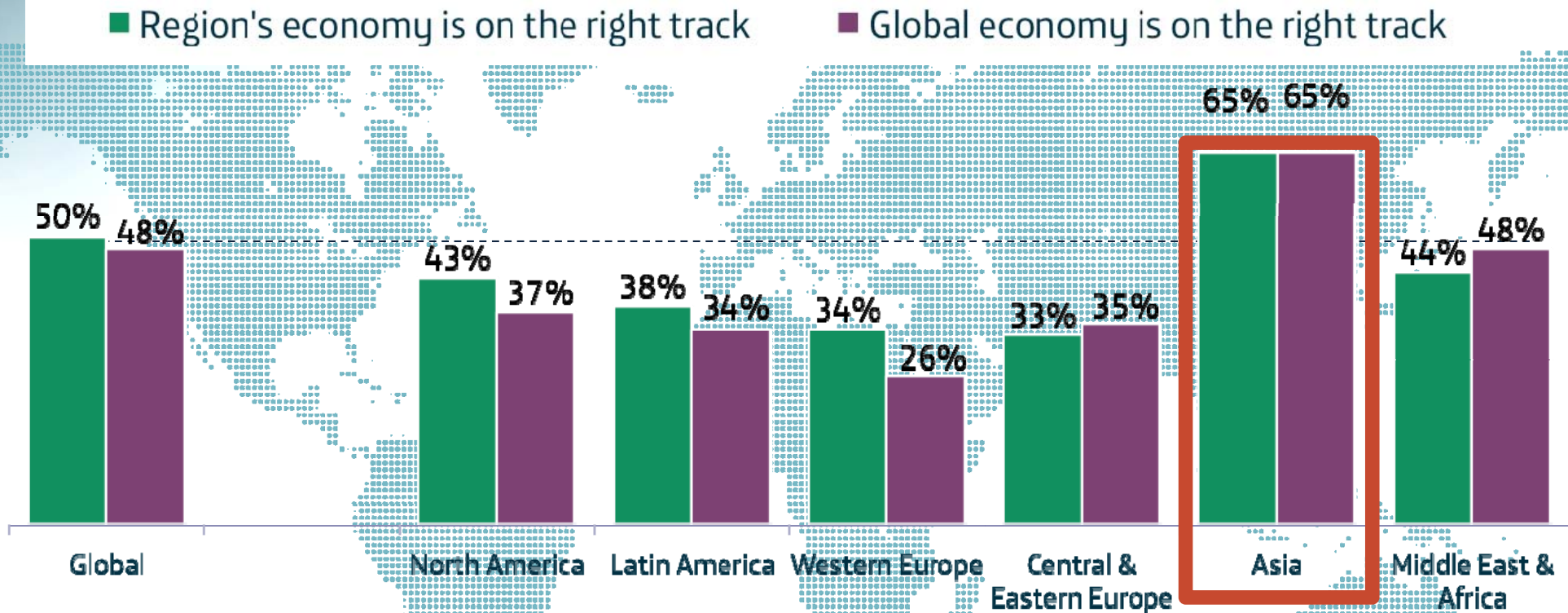
For North America, The Inconvenient Truth Is Still Just That

% saying the issue of climate change is “very pressing”

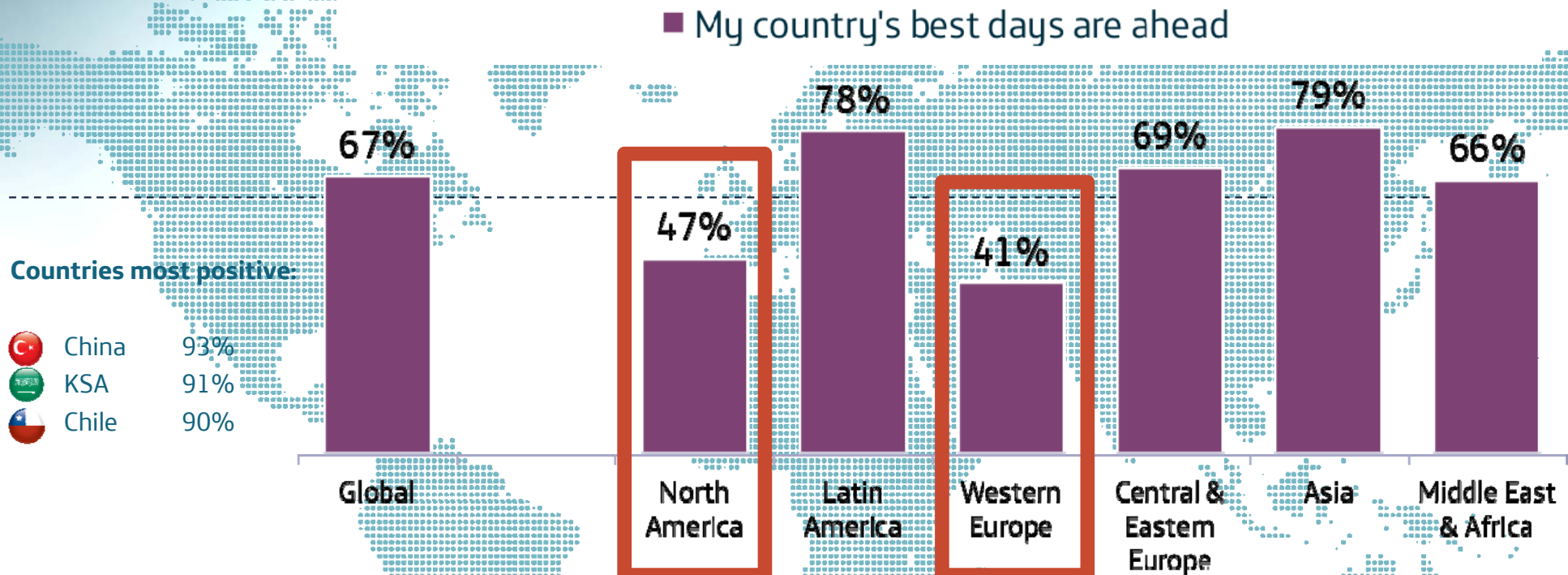


Globally, 53% of Millennials believe climate change is “very pressing”

Few Believe The Economy Is On The Right Track, Except For Millennials In Asia



Outlooks Are Bleakest In North America And Western Europe



Professional Progressions Are Keeping Millennials Up At Night

63%
say

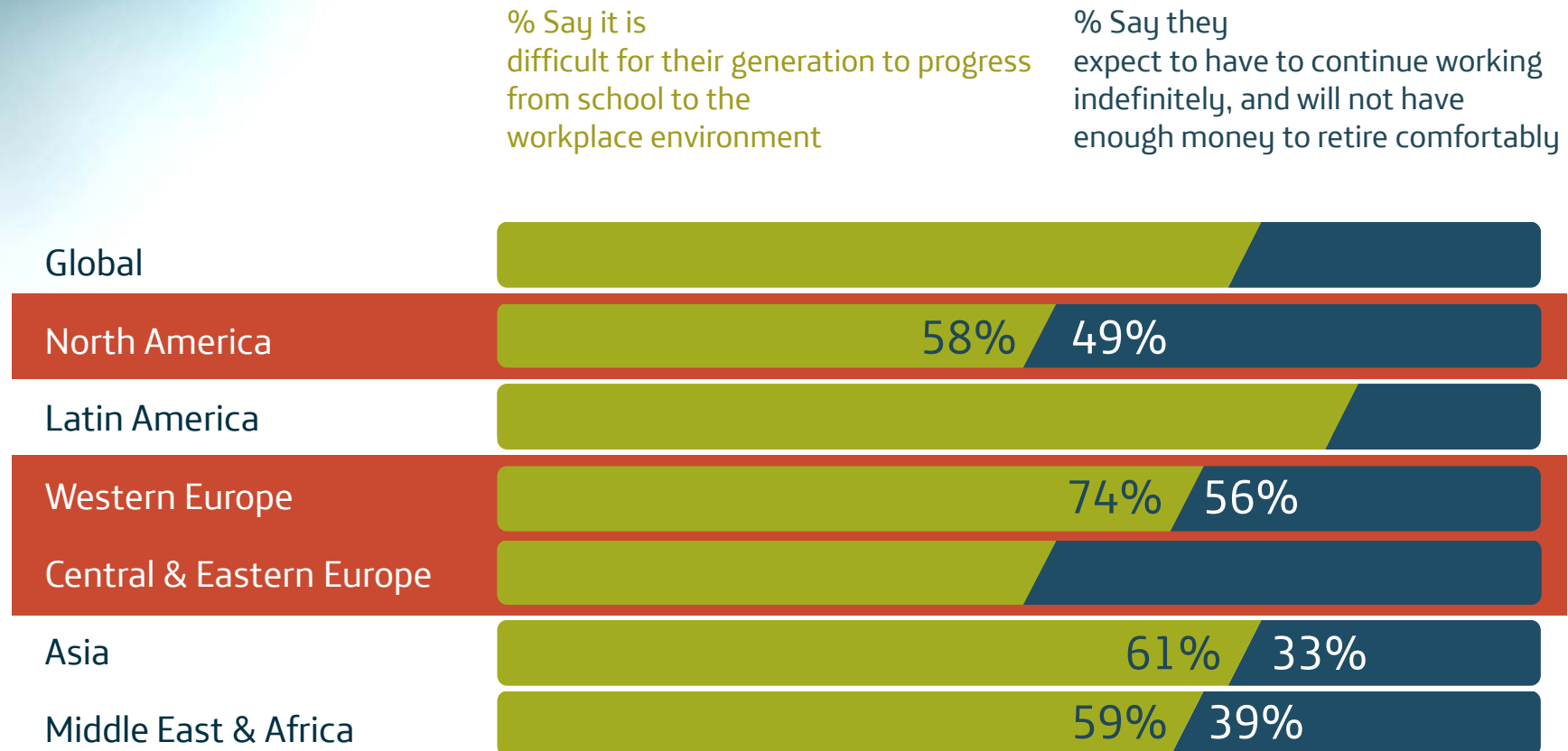
it is difficult for their generation to progress from school to the workplace environment

39%
say

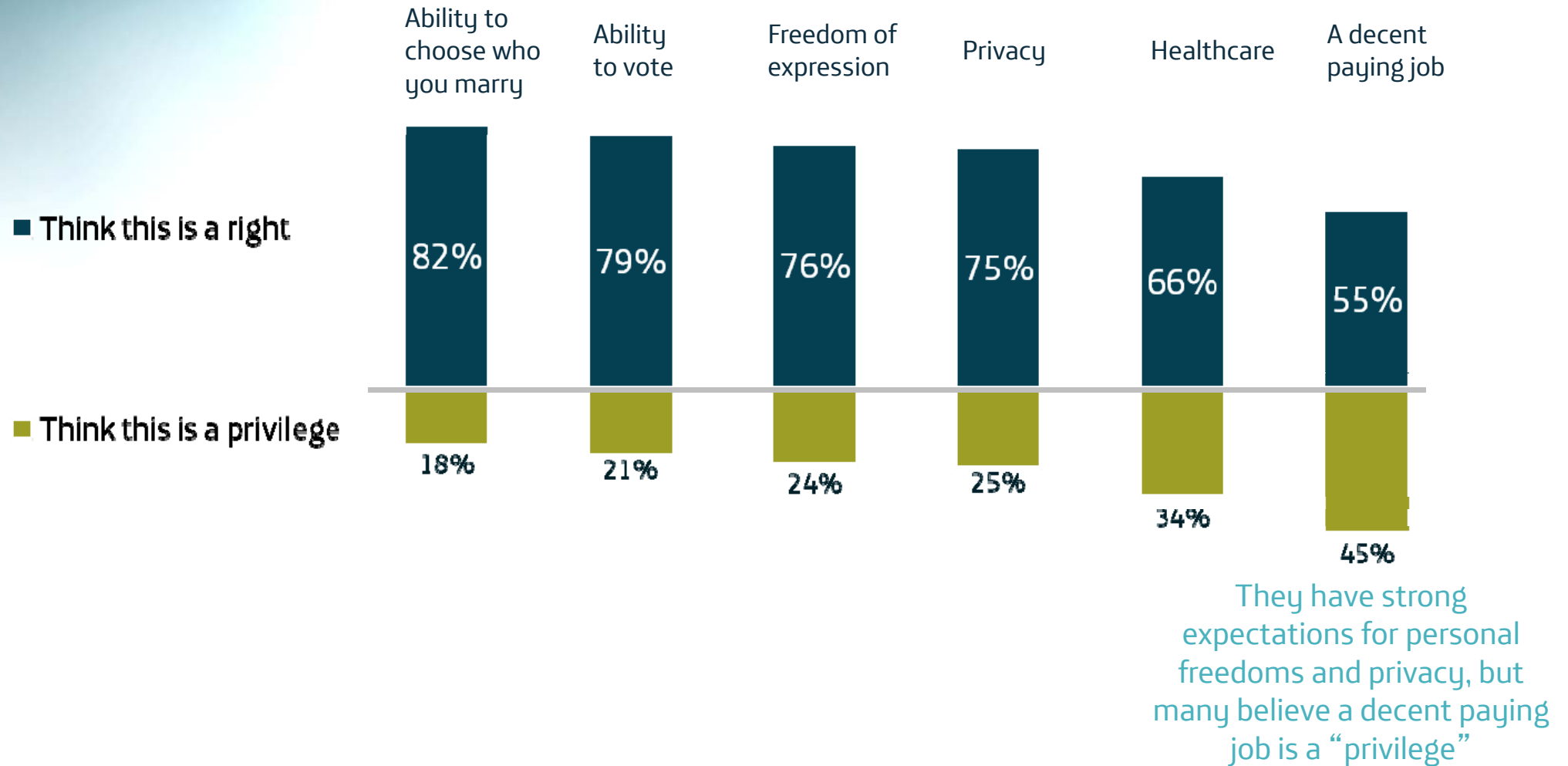
they expect to have to continue working indefinitely and will not have enough money to retire

Less concerned with romantic relationships and marriage, but deeply concerned about economic transitions

These Worries Are Heightened In The Developed West



They May Not Be As “Professionally Entitled” As Their Reputation Suggests



Less Religious Than Their Parents, But Open To Others' Religious Beliefs

51%

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

76%

say they are
open toward
other religions
and beliefs outside
their own

80%

say they
would consider
marrying someone
with different
religious beliefs

Less Religious Than Their Parents, But Open To Others' Religious Beliefs

51%

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

Less Religious Than Their Parents, But Open To Others' Religious Beliefs

76%

say they are
**open toward
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

Less Religious Than Their Parents, But Open To Others' Religious Beliefs

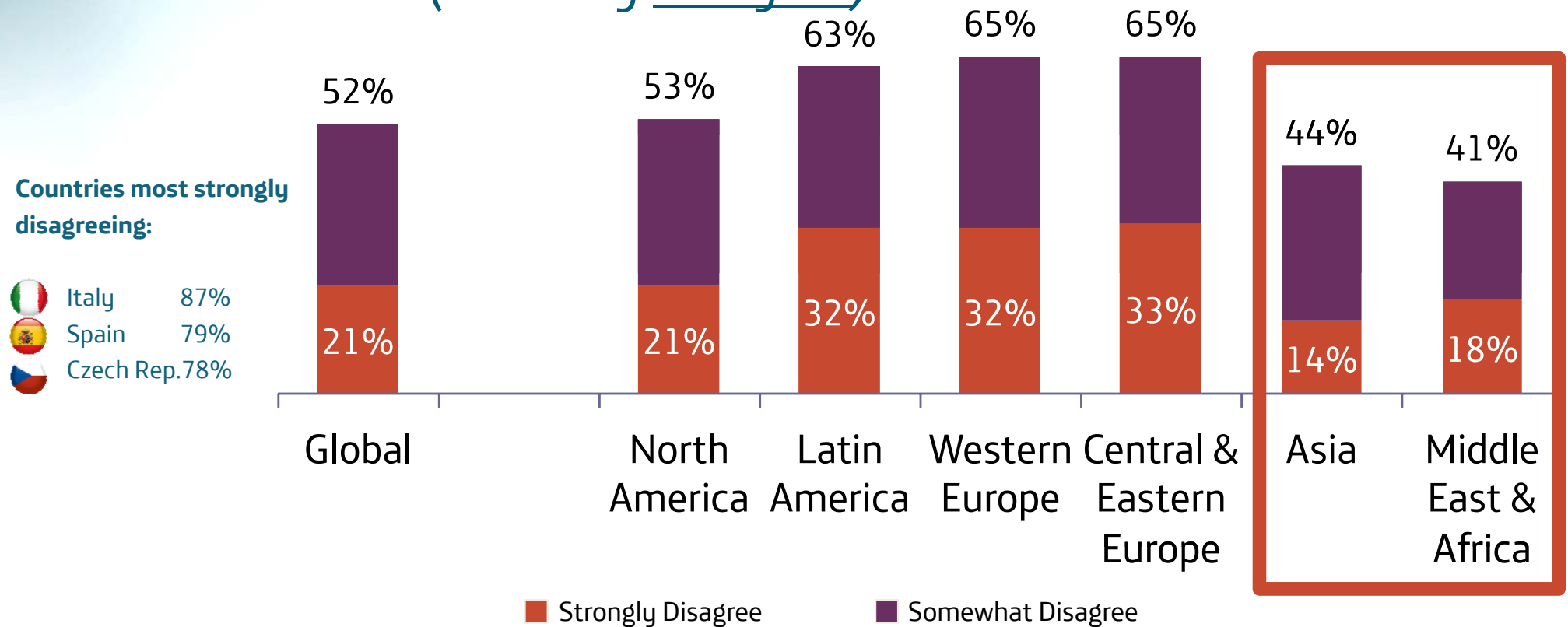
80%

say they
would consider
marrying someone
with different
religious beliefs

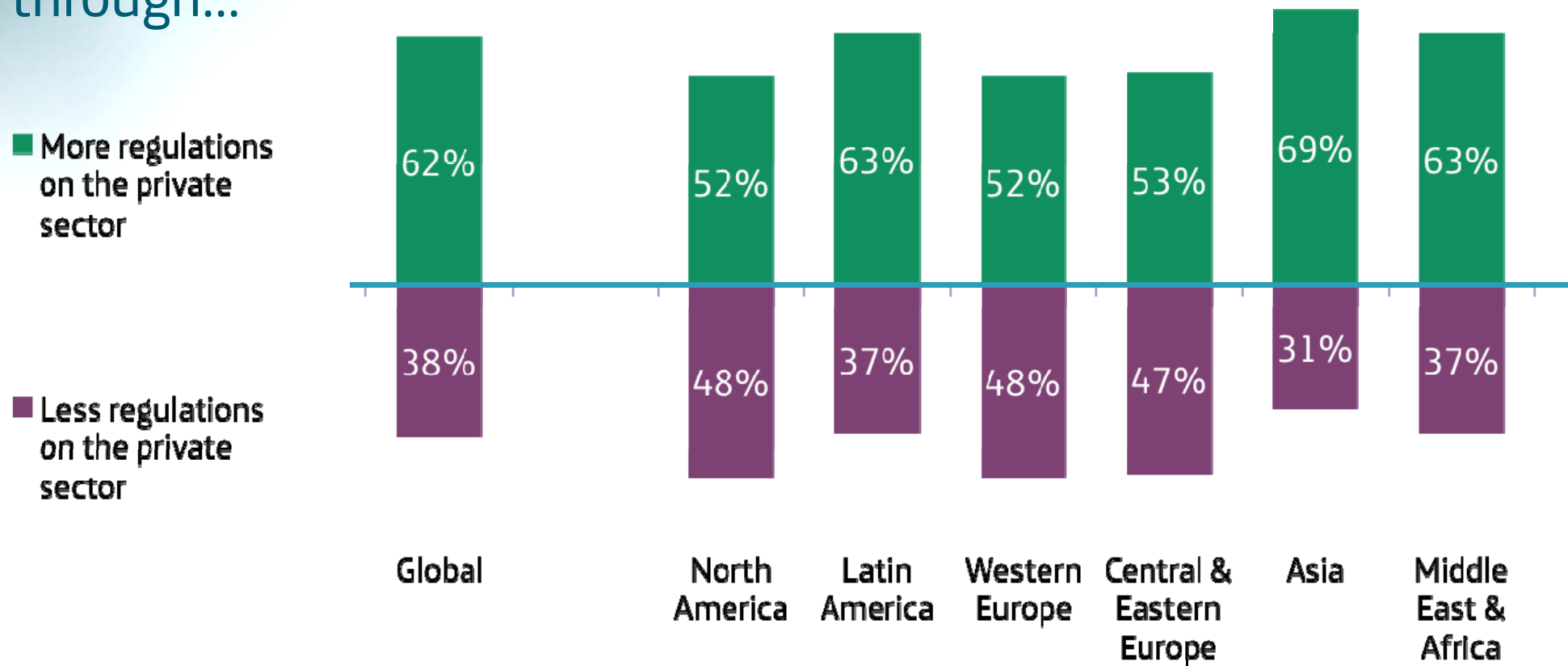
	Global	North America	Latin America	Western Europe	Central & Eastern Europe	Asia	Middle East & Africa
Yes	45%	52%	56%	49%	32%	43%	29%
Maybe	35	27	31	33	46	39	27
No	19	20	13	17	22	17	42

Governments Do Not Reflect Millennials' Values and Beliefs, With The Exception Of Asia And Middle East & Africa

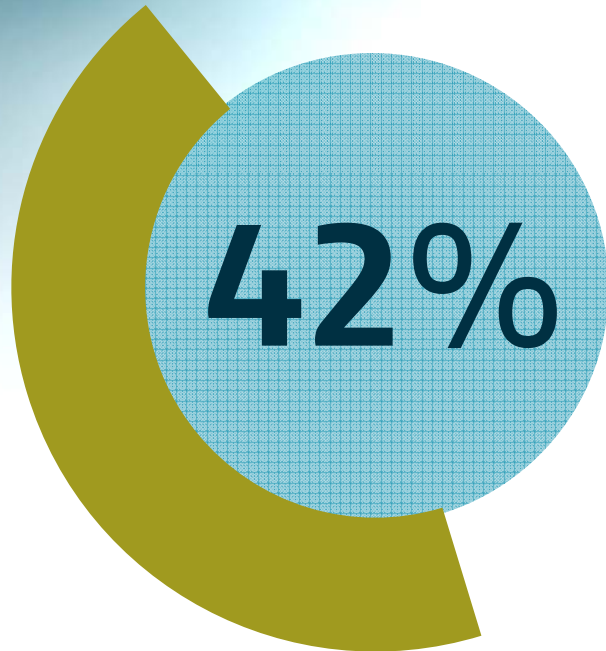
I believe my country's current political system represents my values and beliefs (*Showing Disagree*)



Yet, The Majority Believe More Regulations On
The Private Sector Will Drive Economic Growth
The best way to drive economic growth in my country is
through...



Key Driver Of Change: Belief In The Importance Of Education



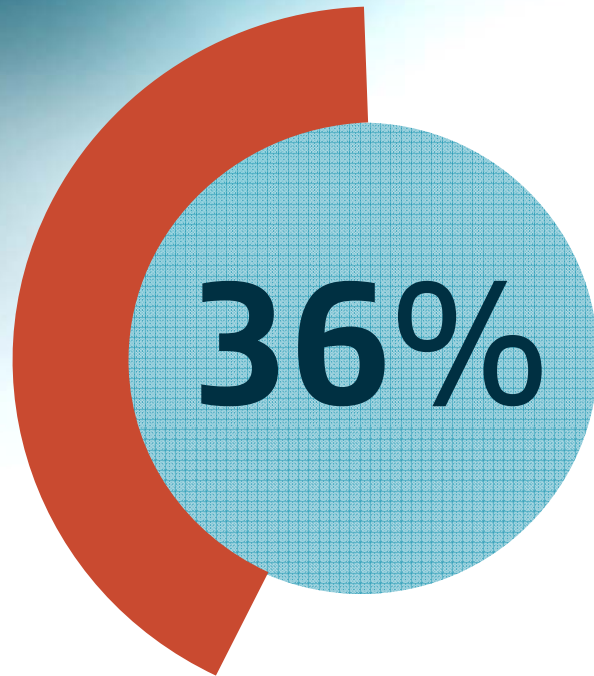
of global Millennials believe improving the **access to / quality of education** is the most important way to make a difference in the world

- 41% ▶ say protecting our environment
- 39% ▶ say eliminating poverty
- 24% ▶ say providing basic food / shelter to people
- 24% ▶ say promoting sustainable energy

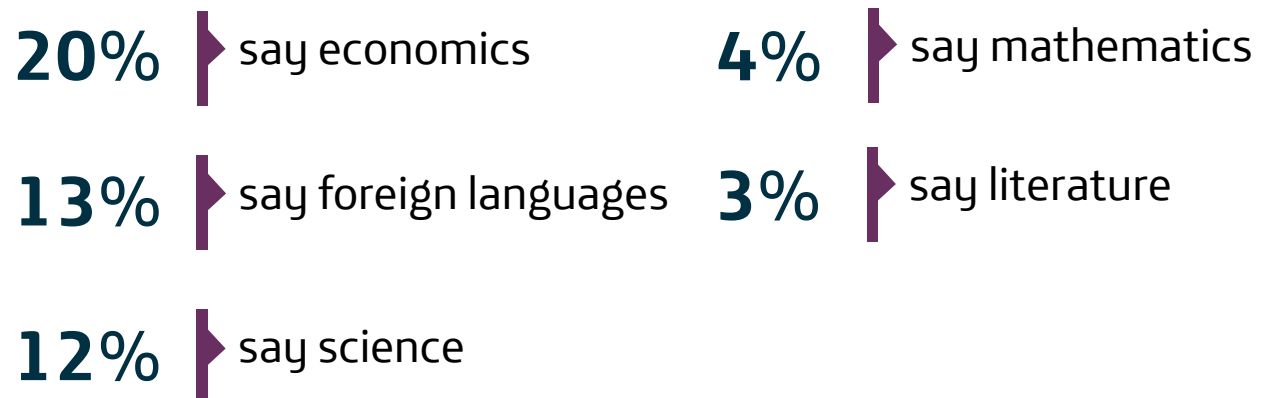
Belief In The Importance Of Education Is Consistent Across Regions

% believe the most important way to make a difference is	Global	North America	Latin America	Western Europe	Germany	Central & Eastern Europe	Asia	Middle East & Africa
Improving the access to and the quality of education	42%	37%	53%	32%	25%	42%	44%	43%
Protecting our environment	41	29	52	32	39	39	48	24
Eliminating poverty	39	34	46	45	46	37	36	43
Providing basic food and shelter to people	24	34	22	27	28	25	21	23
Promoting sustainable energy	24	20	19	20	24	12	31	18

...And The Study Of Choice? Technology



of global Millennials believe an education in **technology** is most important to ensuring future success

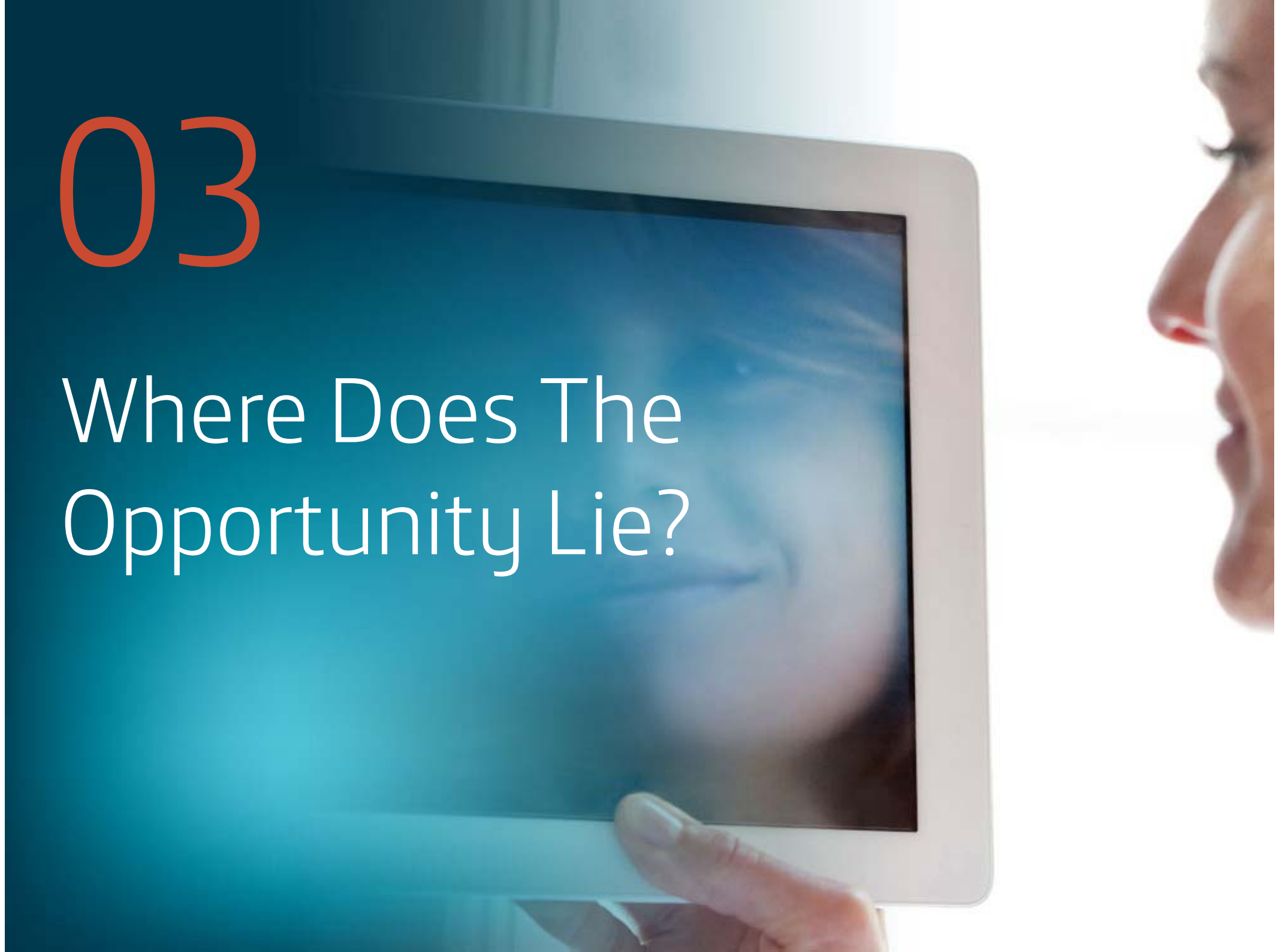


Also Consistent Across Regions

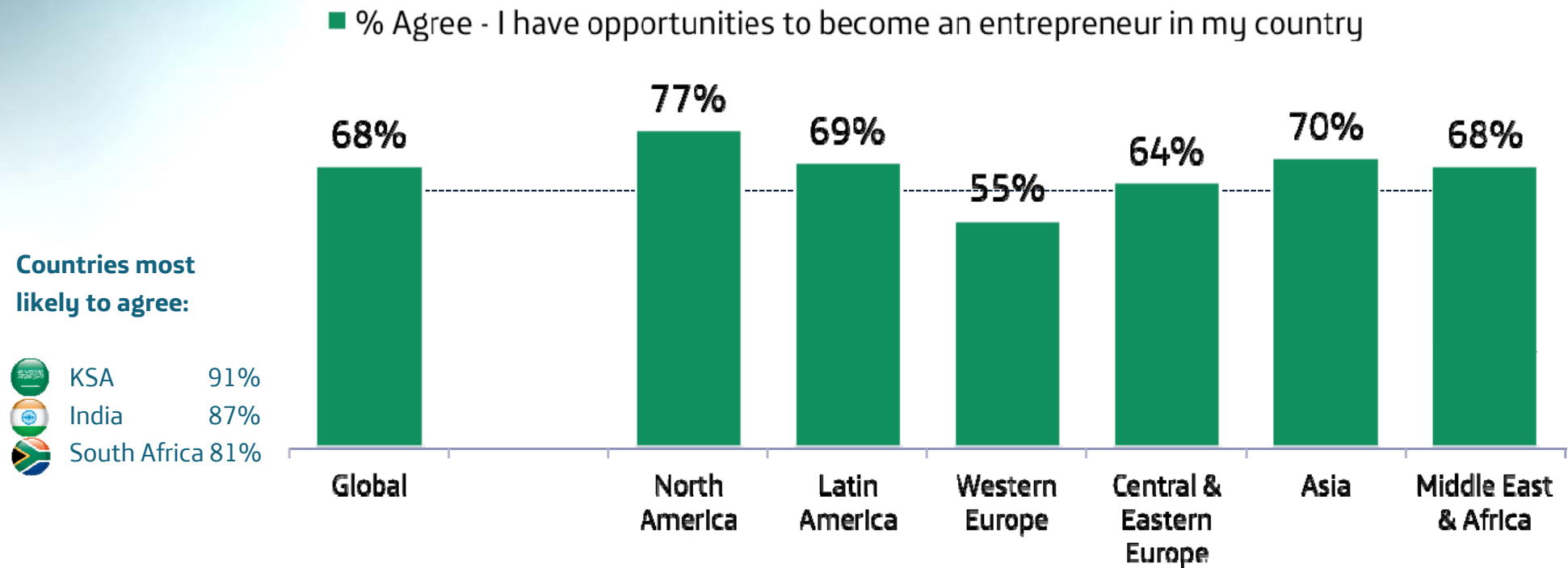
% believe the most important field of study to ensure personal future success	Global	North America	Latin America	Western Europe	Germany	Central & Eastern Europe	Asia	Middle East & Africa
Technology	36%	28%	34%	23%	25%	30%	44%	30%
Economics	20	17	19	20	23	25	20	19
Foreign Languages	13	3	17	15	9	16	13	17
Science	12	19	10	15	14	9	9	14
Mathematics	4	7	5	5	6	5	3	7
Literature	3	4	3	3	1	3	3	3

03

Where Does The
Opportunity Lie?



Where Is The “Opportunity” With This Generation?



Who Can “Make A Difference”?



I don't believe I can make
a local difference **38%**

62% I believe I can make
a local difference

One person's participation does
not make a difference in your
current political system **54%**

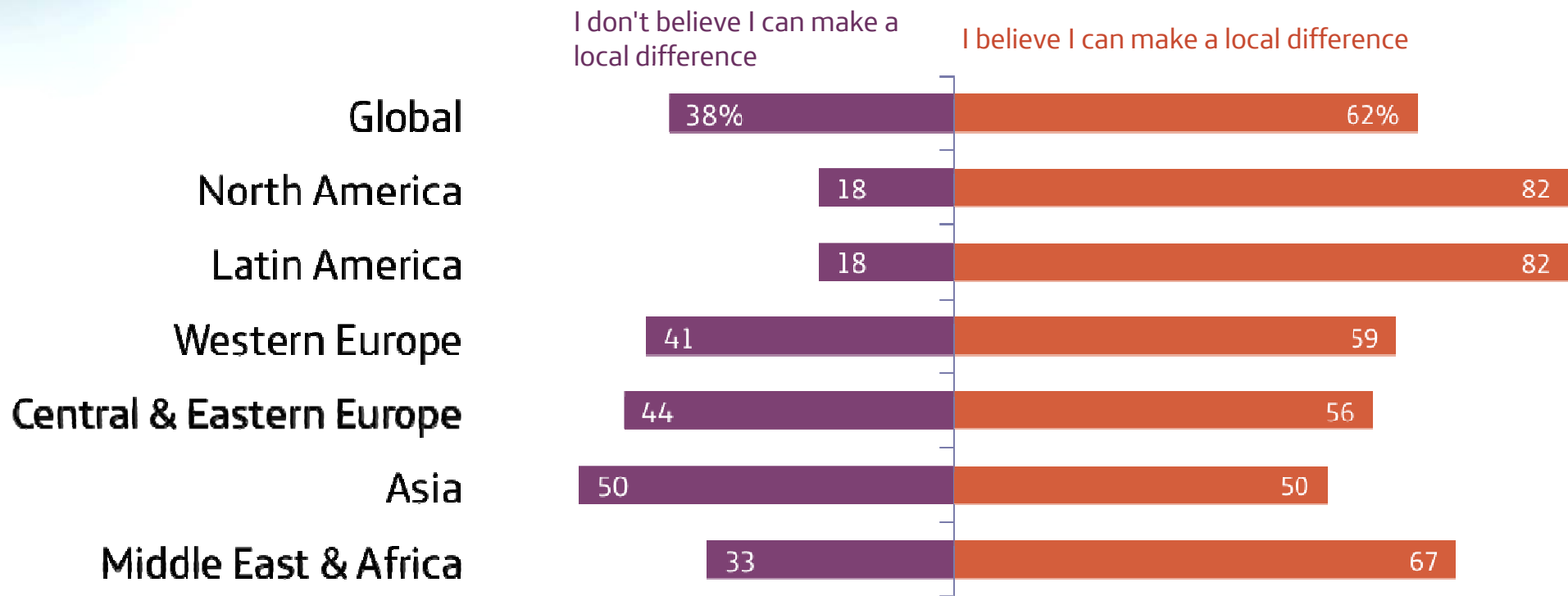
45% One person's participation does
make a difference in your current
political system

I don't believe I can make
a global difference **60%**

40% I believe I can make a
global difference

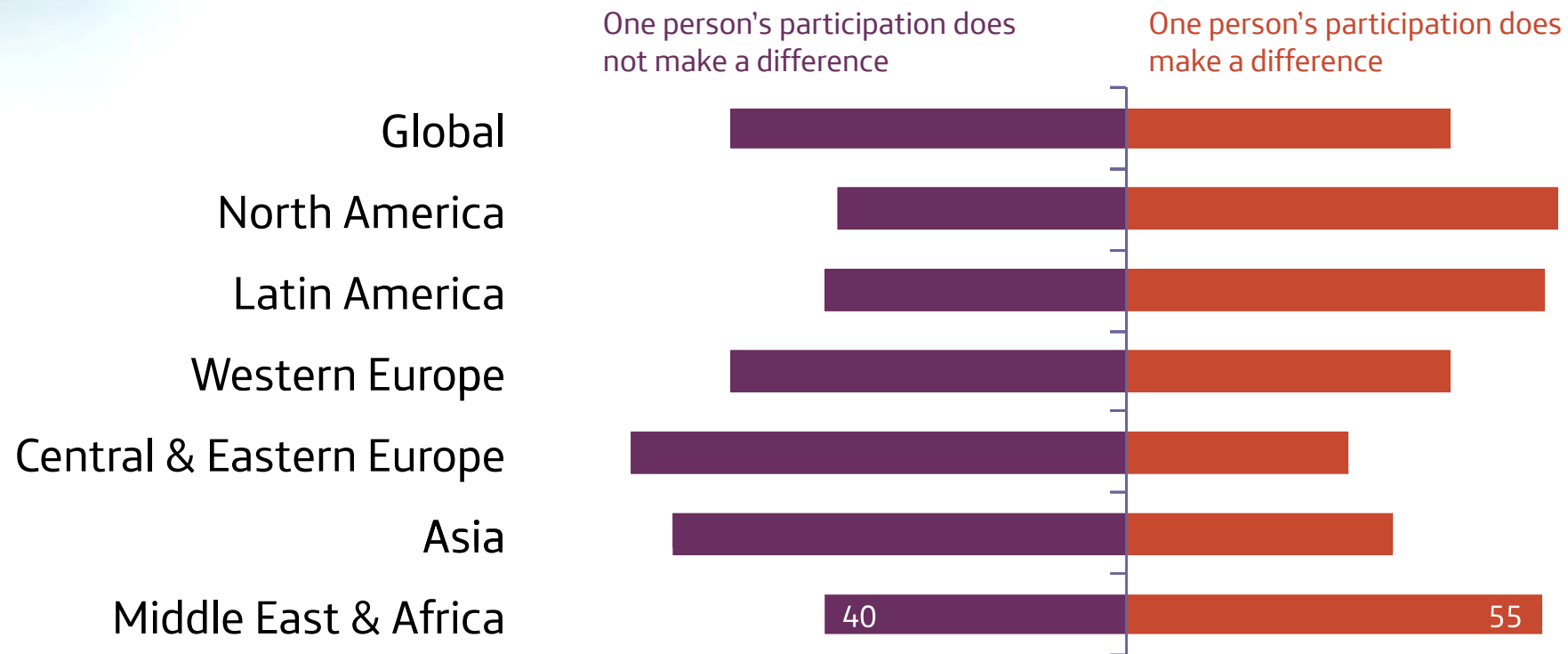
Who Can “Make A Local Difference”?

Asia split 50 / 50



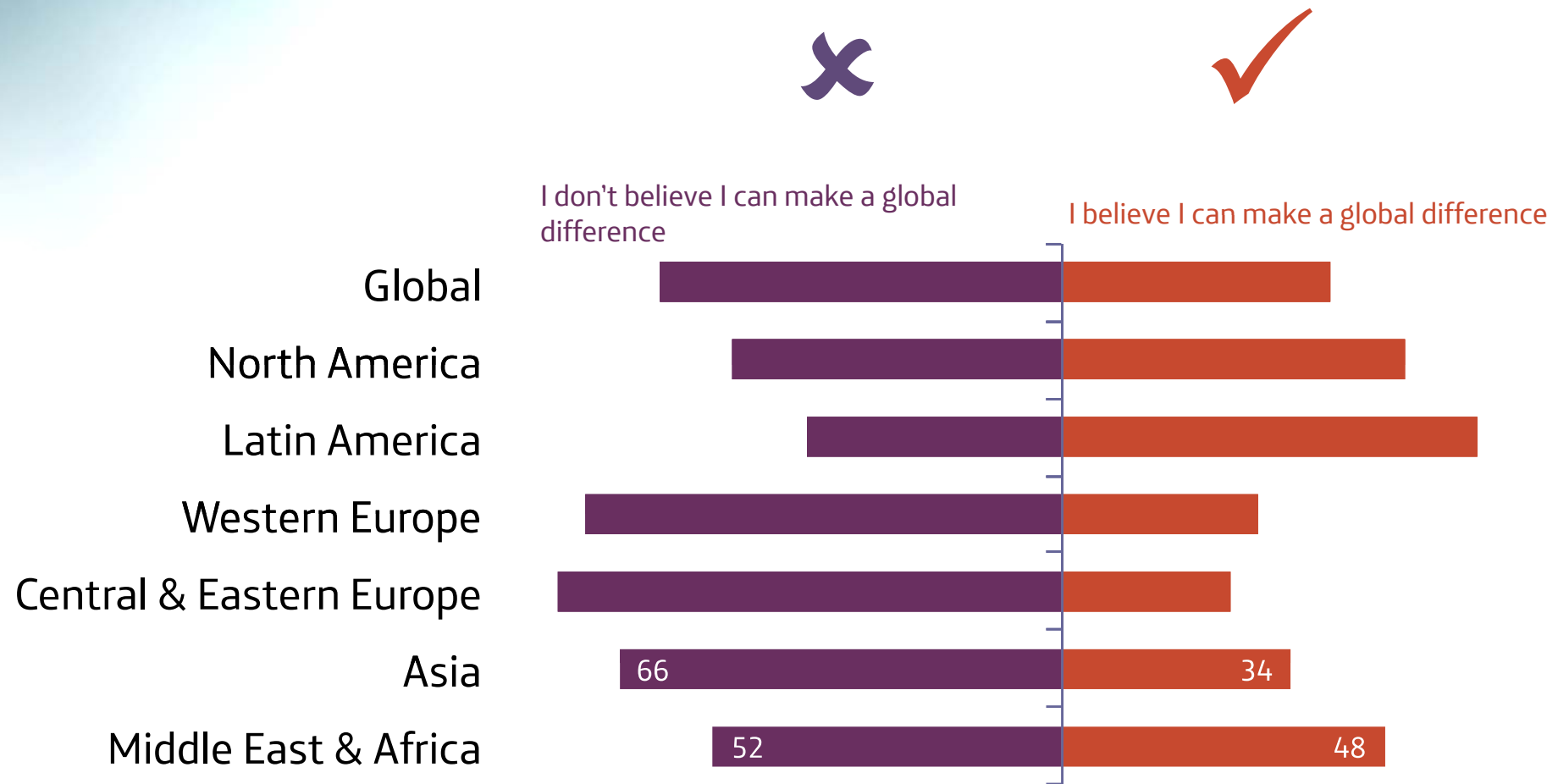
Who Can “Make A Difference” In The Political System?

Central & Eastern Europe
least optimistic



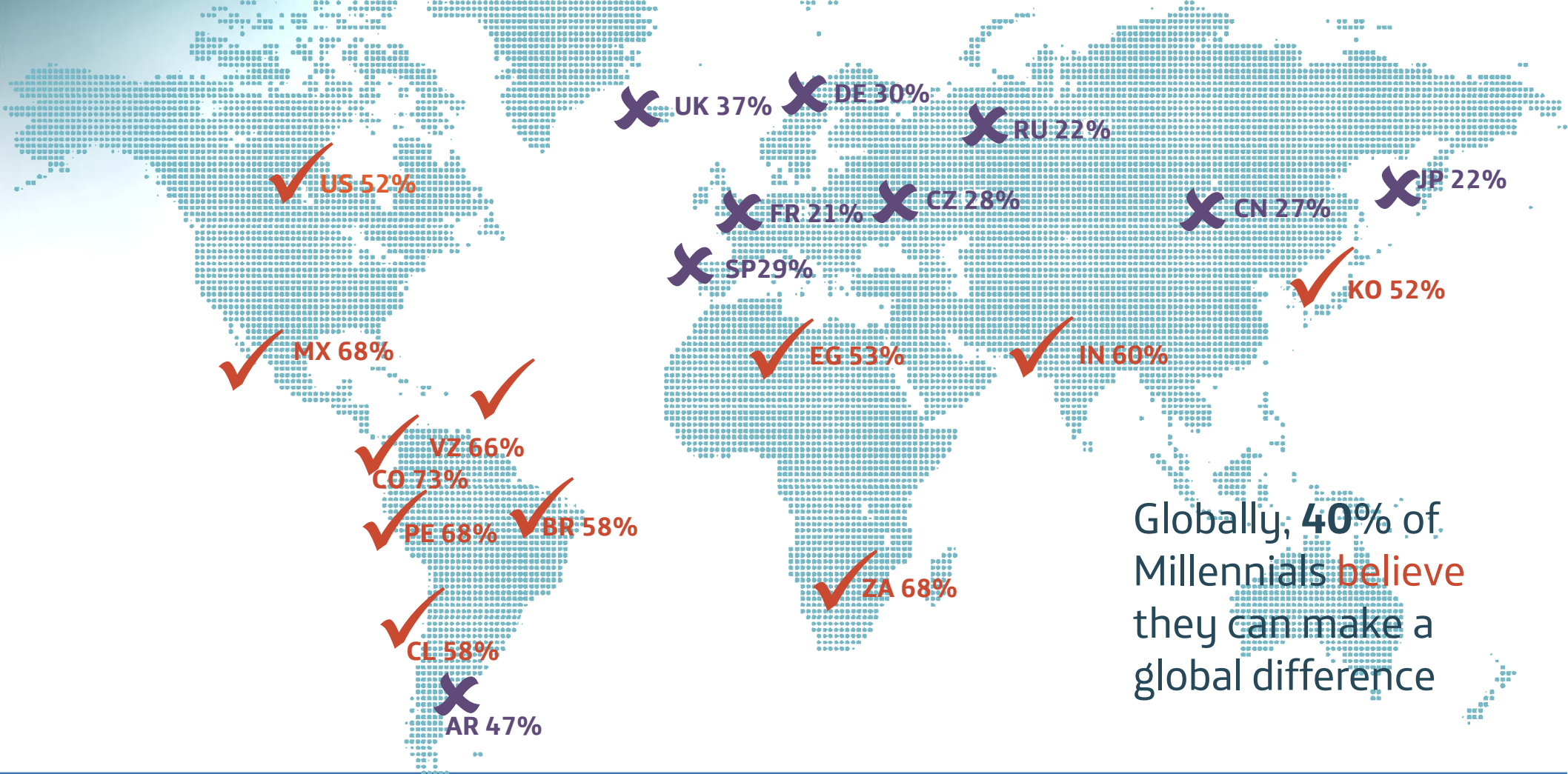
Who Can “Make A Global Difference”?

Most strongly believed in Latin America



“Yes, I Can” Pockets Of Optimism In Several Key Countries

% saying “I believe I can make a global difference”











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

China Vs. India

India has the world's largest Millennial population and a large, fast-growing economy but...

Millennials all over the world predict China will drive the global economy. Few Millennials consider India to be a global contender, **except for those in India...**



In your opinion, which country or countries will be the biggest driver(s) of growth for the global economy in the next 10 years? Please select all that apply.	Global Millennials	Indian Millennials
 China	58%	44%
 US	31%	36%
 Japan	22%	29%
 India	22%	60%
 Germany	13%	13%
 Brazil	12%	8%
 UK	12%	17%
 Russia	11%	12%

The Gap In Asia: China Is Fueled By A Great Economy, While India Is Fueled By A Sense Of Opportunity



Chinese Millennials



Indian Millennials

93%	% say their country's "best days are ahead"	81%
76%	% say the economy in their region is headed in the "right direction"	55%
50%	% say "globalization creates more opportunities for all"	69%
43%	% say "I believe I can make a local difference"	80%
52%	% say it is important to "be an entrepreneur"	80%

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?

Top 14

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

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%

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

Millennial Leaders: More Influenced By Technology

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



Millennial Leaders: Armed With Smartphones And An Excellent Comfort with Tech

How would you describe your personal knowledge and comfort level with technology?	Global Millennials	Millennial Leaders
“Excellent”	30%	72%

What kind of access do you have to the following technological devices? % say “I own it”	Global Millennials	Millennial Leaders
Smartphone	76%	82%
Laptop	74%	80%
Desktop	50%	66%
Tablet	28%	46%



Millennial Leaders: Optimistic

How optimistic are you about your future?	Global Millennials	Millennial Leaders
“Very optimistic”	32%	61%

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

Do you believe you can make a global difference?	Global Millennials	Millennial Leaders
“I believe I can make a global difference”	40%	74%



Millennial Leaders: Career-Oriented

How important or unimportant are each of the following life accomplishments to you personally?

“Making it to the top of your career” (Very important)



In your opinion, how easy or difficult is it for your generation to progress from school to the workplace environment?

“Easy” (Very + somewhat easy)



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

How often do you participate in your country's political process (e.g. voting, contributing money to a political candidate, etc.)?

“Always participate”



Technology has made me better informed about political issues in my country

“Strongly agree”



Social media plays an important role in current political events and movements in my country

“Strongly agree”



Technology has made my government more transparent

“Strongly agree”



