



Telefónica Global Millennial Survey: Global Results_

**New York Launch:
Americas Society/Council of the Americas**

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#TEFMillennials**




























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	+/-9.9%

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 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 +/-9.9 percent.



Latin America Demographics	
18-24 yrs old	53%
25-30 yrs old	47%

North America Demographics	
18-24 yrs old	52%
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.

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 in the Western Hemisphere (North America and Latin America) are defined by their ubiquitous use of technology and believe that it creates more opportunities for all. However, more Millennials in North America than Latin America believe that technology is not an equalizer and that technology has widened the gap between the rich and the poor.

2 What makes Millennials tick?

The economy is the most important issue to North American Millennials while in Latin America, Millennials are most concerned about social inequality. Outlooks are bleak in North America but Latin American Millennials are highly optimistic believing their best days are ahead. The majority of Millennials in the Western Hemisphere believe more regulations on the private sector will drive economic growth; and the key driver of change will be access to / quality of education.

3 Where does the opportunity lie?

The majority of Millennials in North America and Latin America value entrepreneurship, believe they can make a local and global difference, and say that one person's participation can make a difference in the political system.

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. Millennial Leaders in the Western Hemisphere say they have an excellent comfort level with technology, particularly in North America, and are more likely to own technological devices.

01

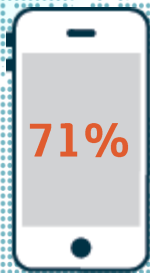
Me, Myself and Technology_



Millennials Are A Smartphone Generation

Globally 76% say “I own a smartphone”

North America



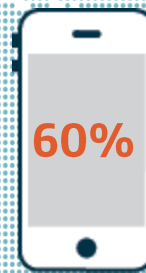
Laptop	83%
Desktop	50%
Tablet	37%

Western Europe



Laptop	72%
Desktop	49%
Tablet	22%

Central & Eastern Europe



Laptop	64%
Desktop	56%
Tablet	23%

Latin America



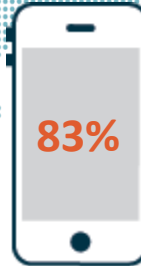
Laptop	62%
Desktop	58%
Tablet	22%

Middle East & Africa



Laptop	66%
Desktop	45%
Tablet	20%

Asia

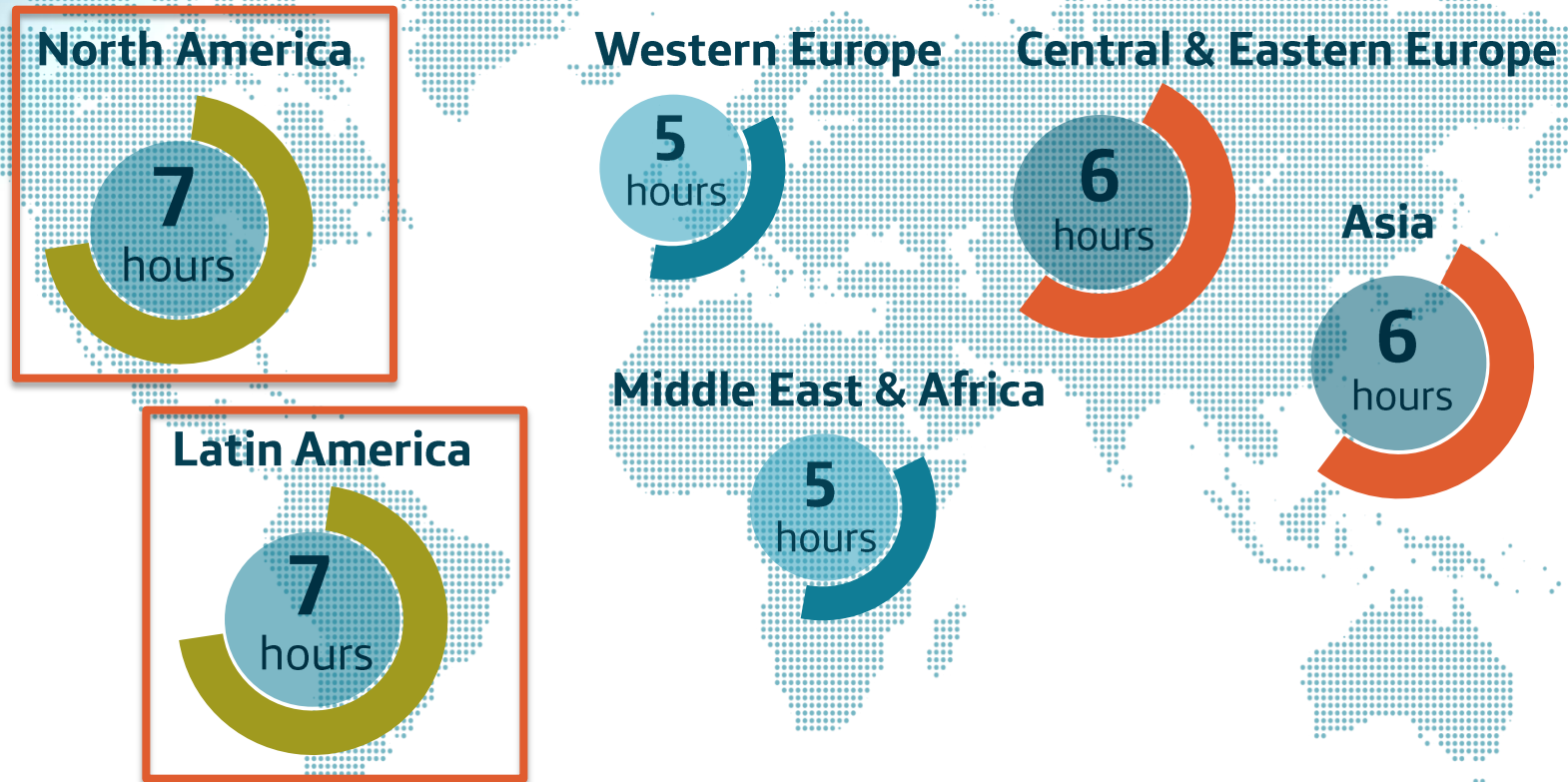


Laptop	77%
Desktop	49%
Tablet	31%

Global smartphone penetration
in 2011: 30%*

Constantly Connected, Constantly Online

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



Technology Creates Opportunity...

Millennials believe technology can create opportunities for individuals

87%
say

“technology has made language barriers easier to overcome”

69%
say

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

“technology has made it easier to get a job”

83%
agree

However, Technology Is Not An Equalizer

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

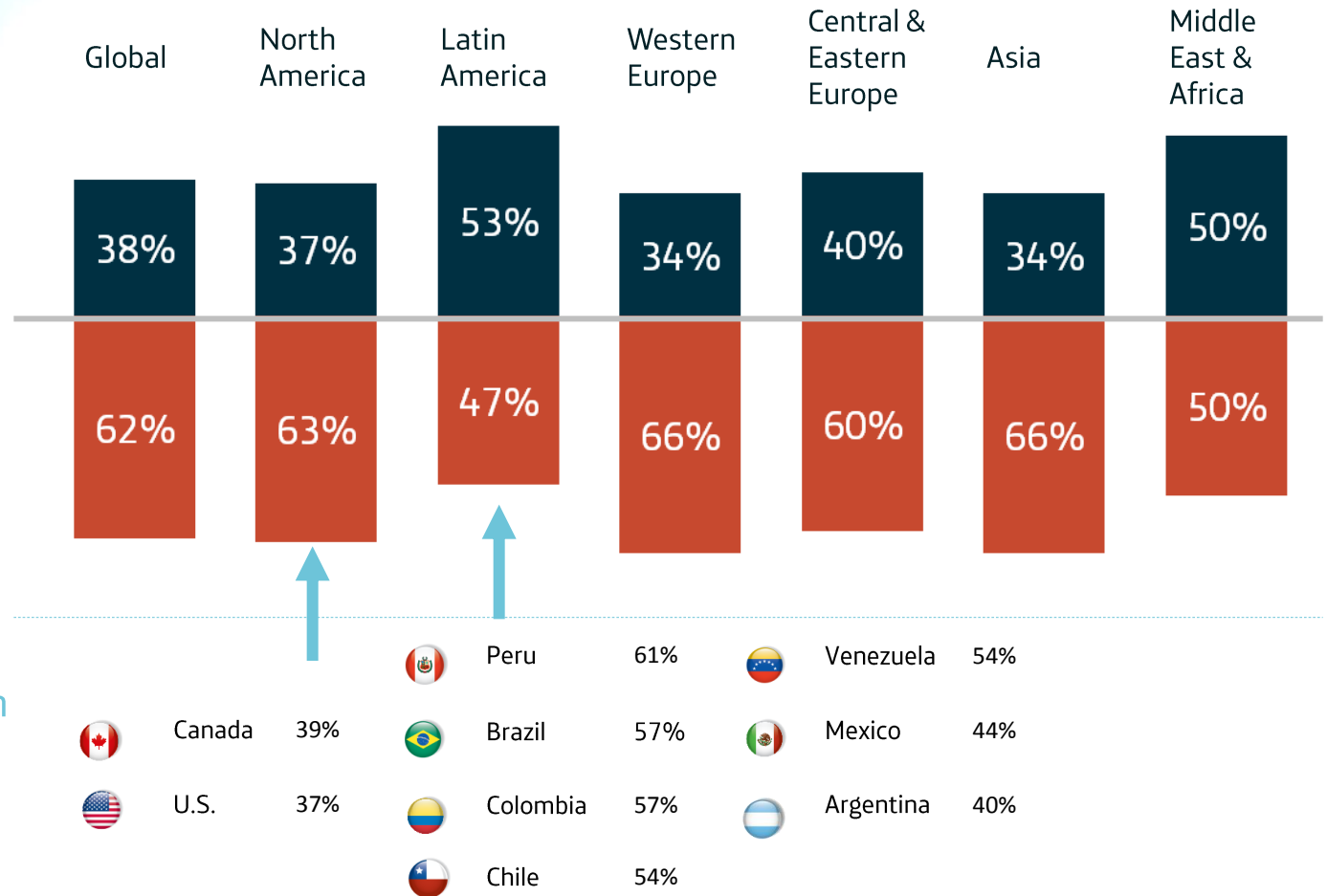
62%
say

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

Latin American Millennials Are Least Concerned About The Gap Between 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



More Latin American Millennials than North American Millennials believe Technology has shrunk the gap.

Technology Is Also The New Gender Gap

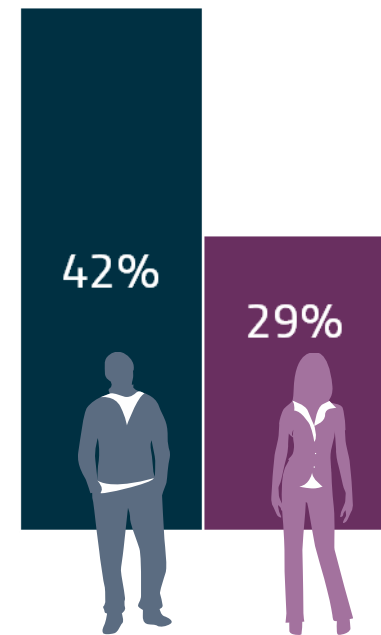
Consider themselves
“on the cutting-edge
of technology”



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



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



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

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 A Very Pressing Issue To Latin American Millennials

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

North America

36%

Countries in Latin America which most strongly believe climate change is very pressing:

	Colombia	83%
	Chile	72%
	Brazil	70%

Latin America

70%

Western Europe

49%

Central & Eastern Europe

38%

Middle East & Africa

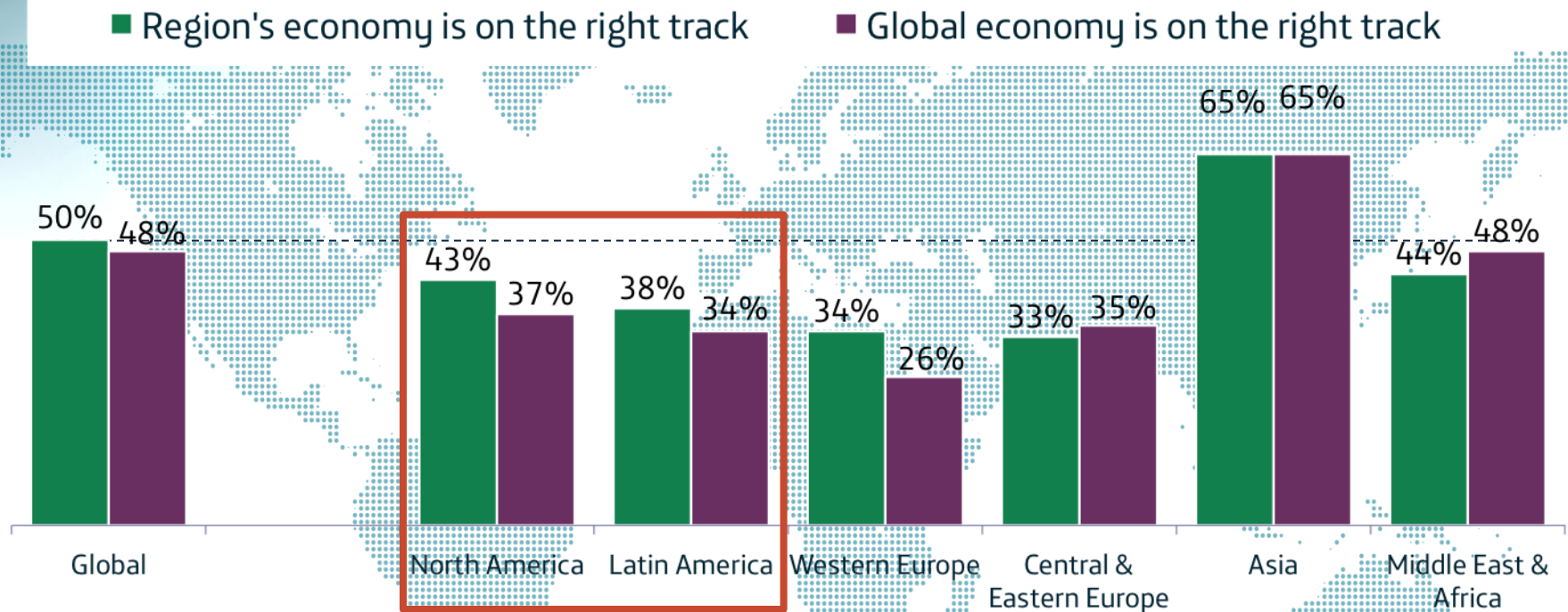
44%

Asia

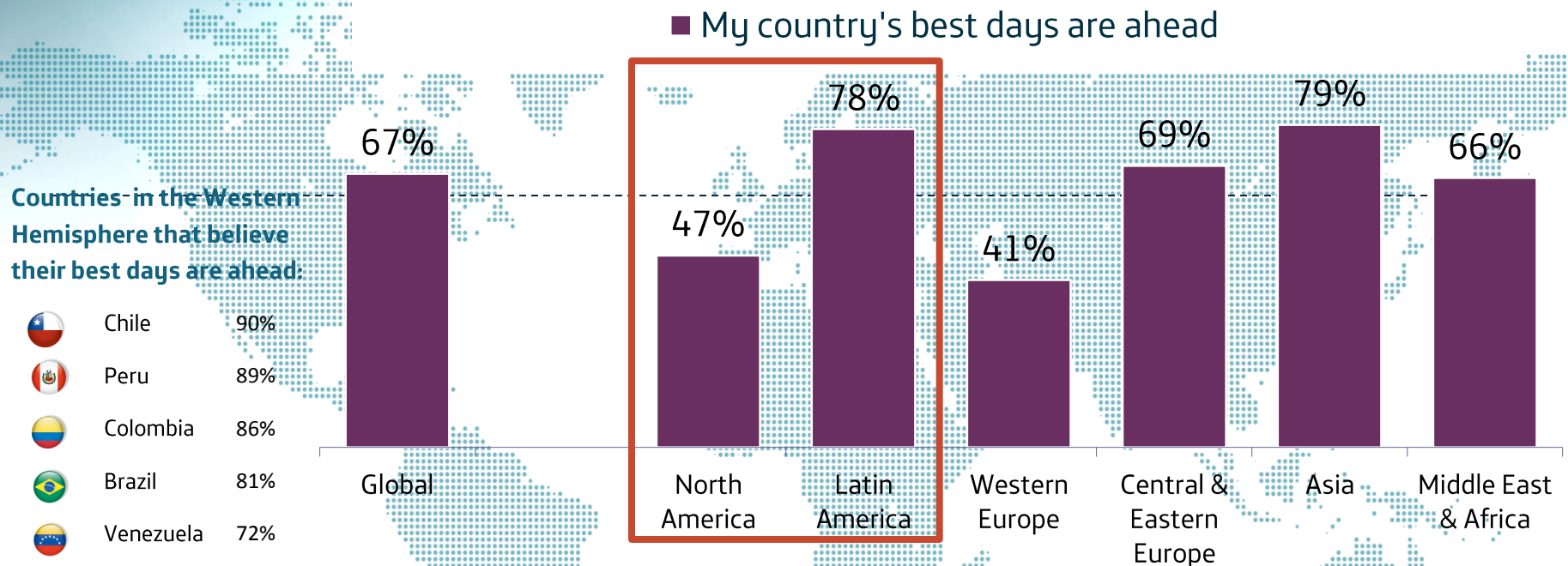
59%

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 Bleak In North America But Latin American Millennials Are Highly Optimistic



Countries in the Western Hemisphere that believe their best days are ahead:

	Chile	90%
	Peru	89%
	Colombia	86%
	Brazil	81%
	Venezuela	72%
	Mexico	71%
	Canada	67%
	Argentina	56%
	U.S.	44%

Professional Progressions Are Keeping Millennials Up At Night

63%
say

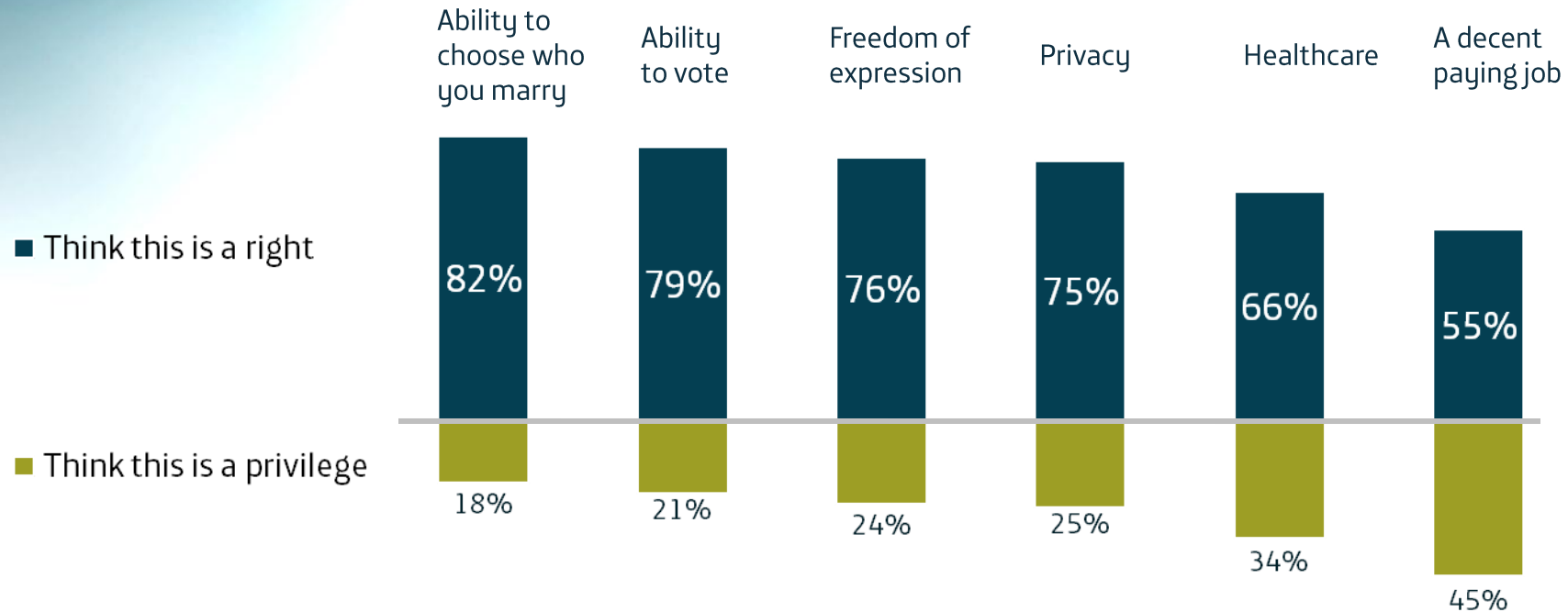
it is difficult for their
generation to progress from
school to the workplace
environment

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

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



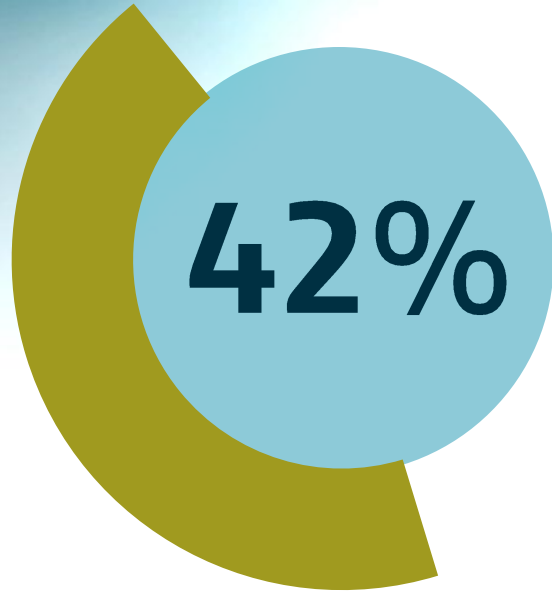
They have strong expectations for personal freedoms and privacy, but many believe a decent paying job is a “privilege”

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...



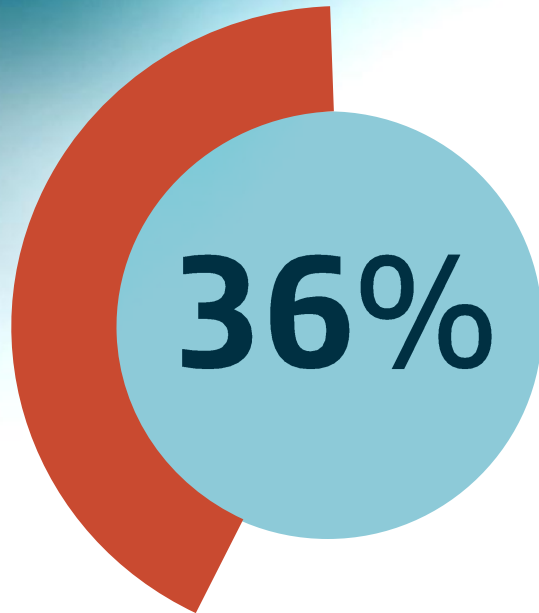
Key Driver Of Change: Belief In The Importance Of Education



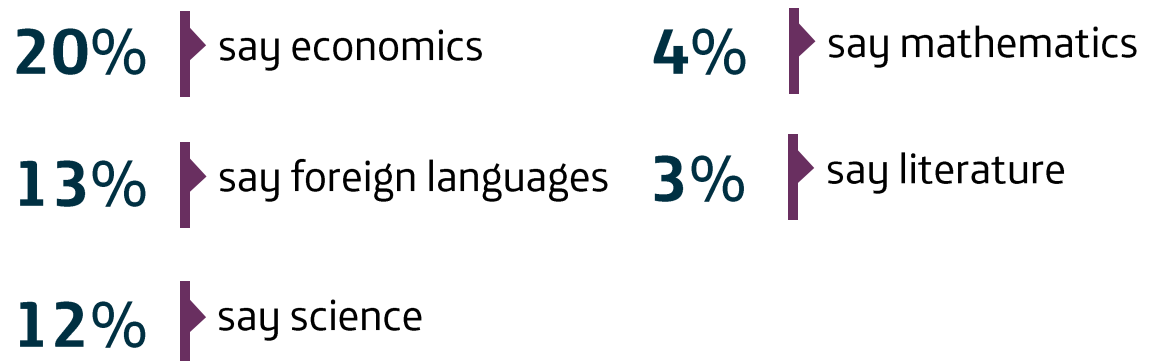
of global Millennials believe improving the **access to / quality of education** is the most important way to make a difference in the world

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

...And The Study Of Choice? Technology

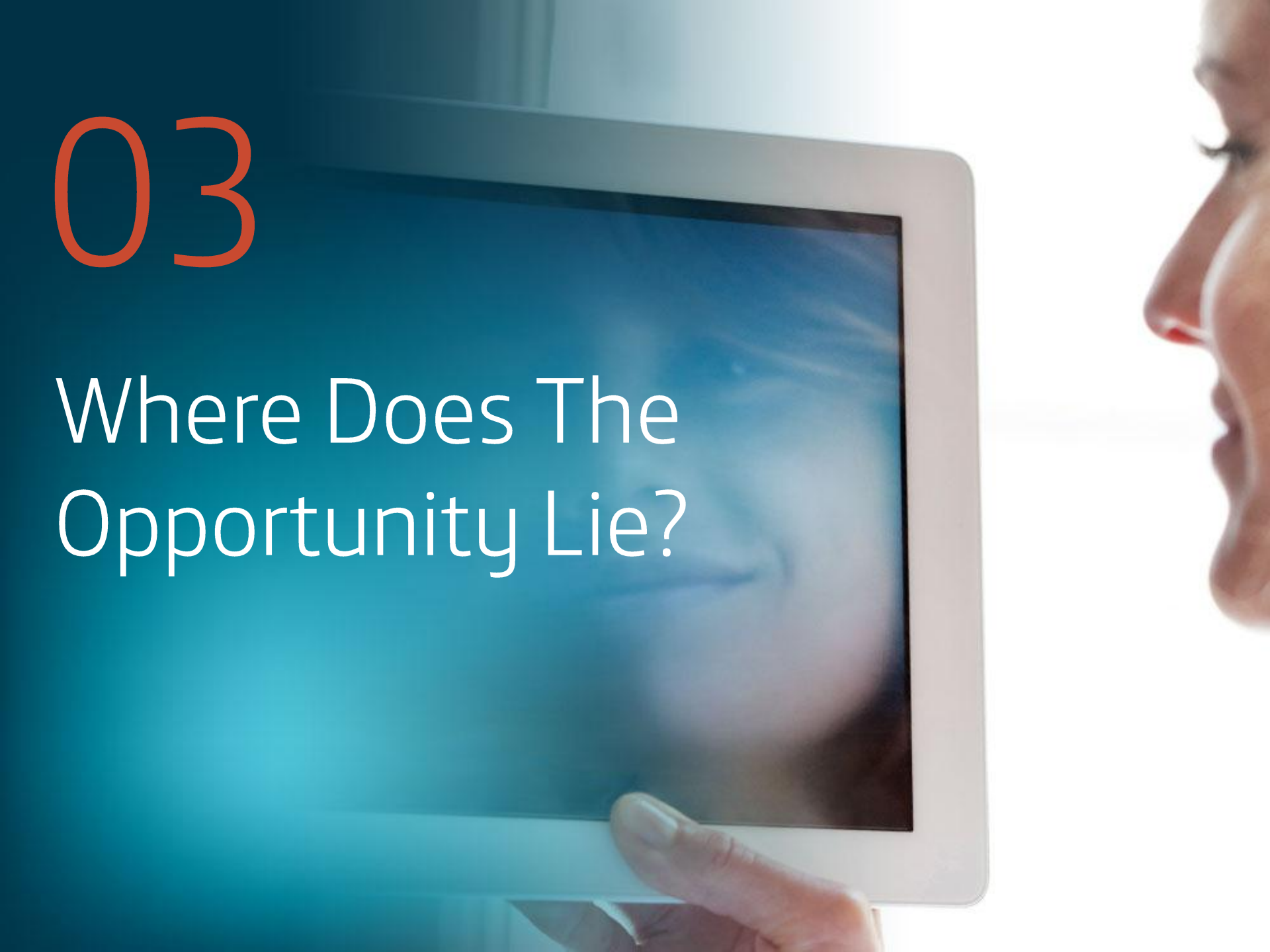


of global Millennials believe an education in **technology** is most important to ensuring future success



03

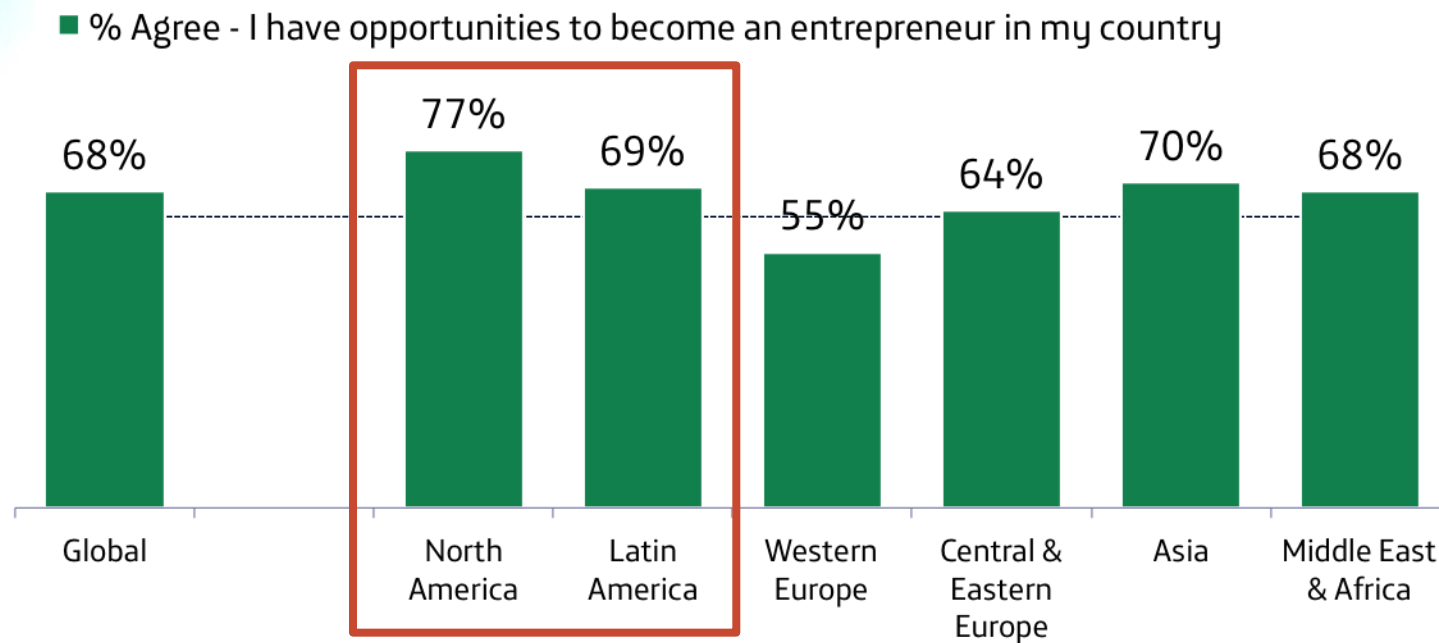
Where Does The
Opportunity Lie?



Where Is The “Opportunity” With This Generation?

Countries in the Western Hemisphere are most likely to agree:

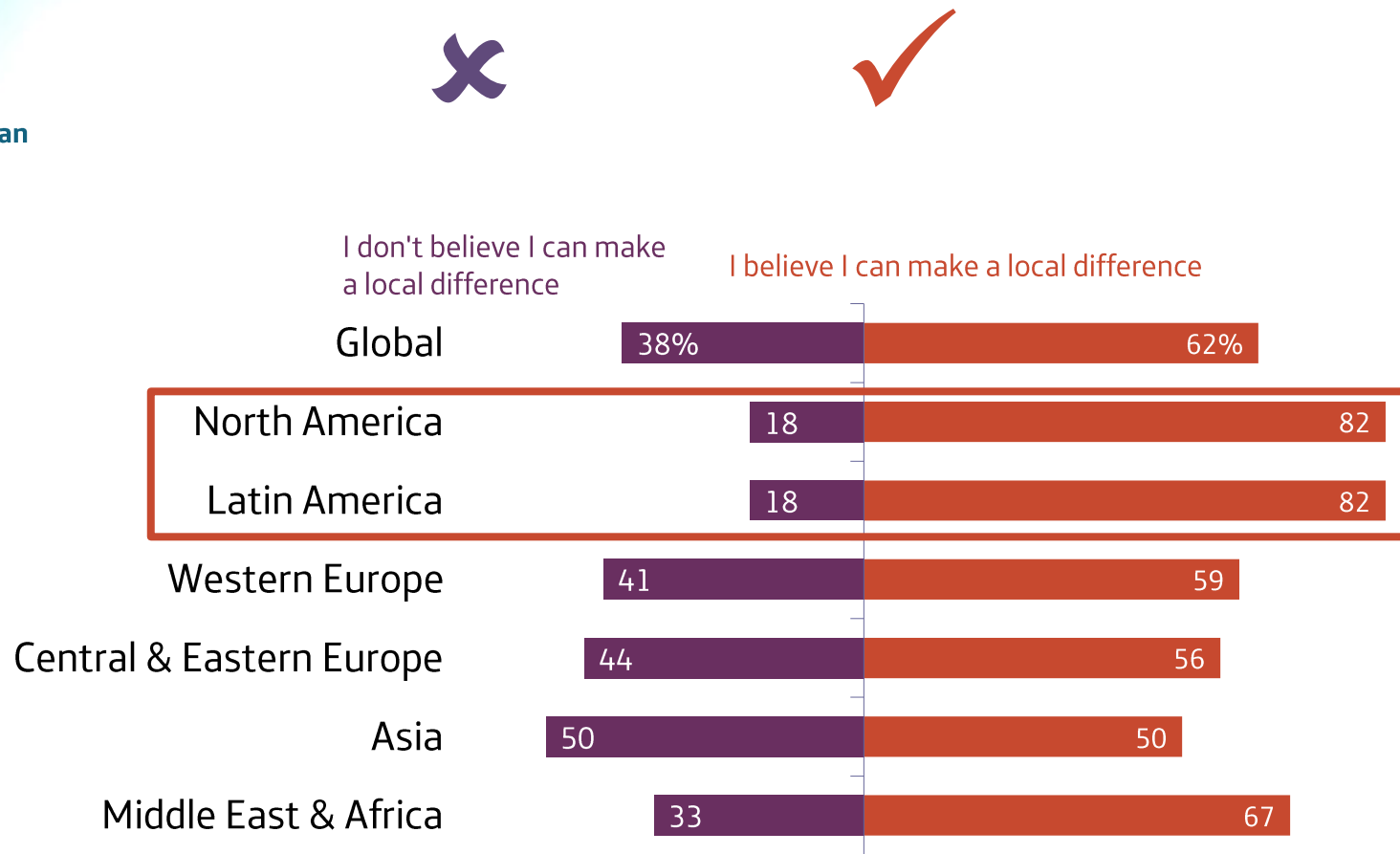
	Canada	79%
	U.S.	77%
	Brazil	75%
	Peru	74%
	Colombia	73%
	Chile	72%
	Mexico	58%
	Venezuela	57%
	Argentina	53%



Who Can “Make A Local Difference”?



Countries in the Western Hemisphere believe they can make a local difference:

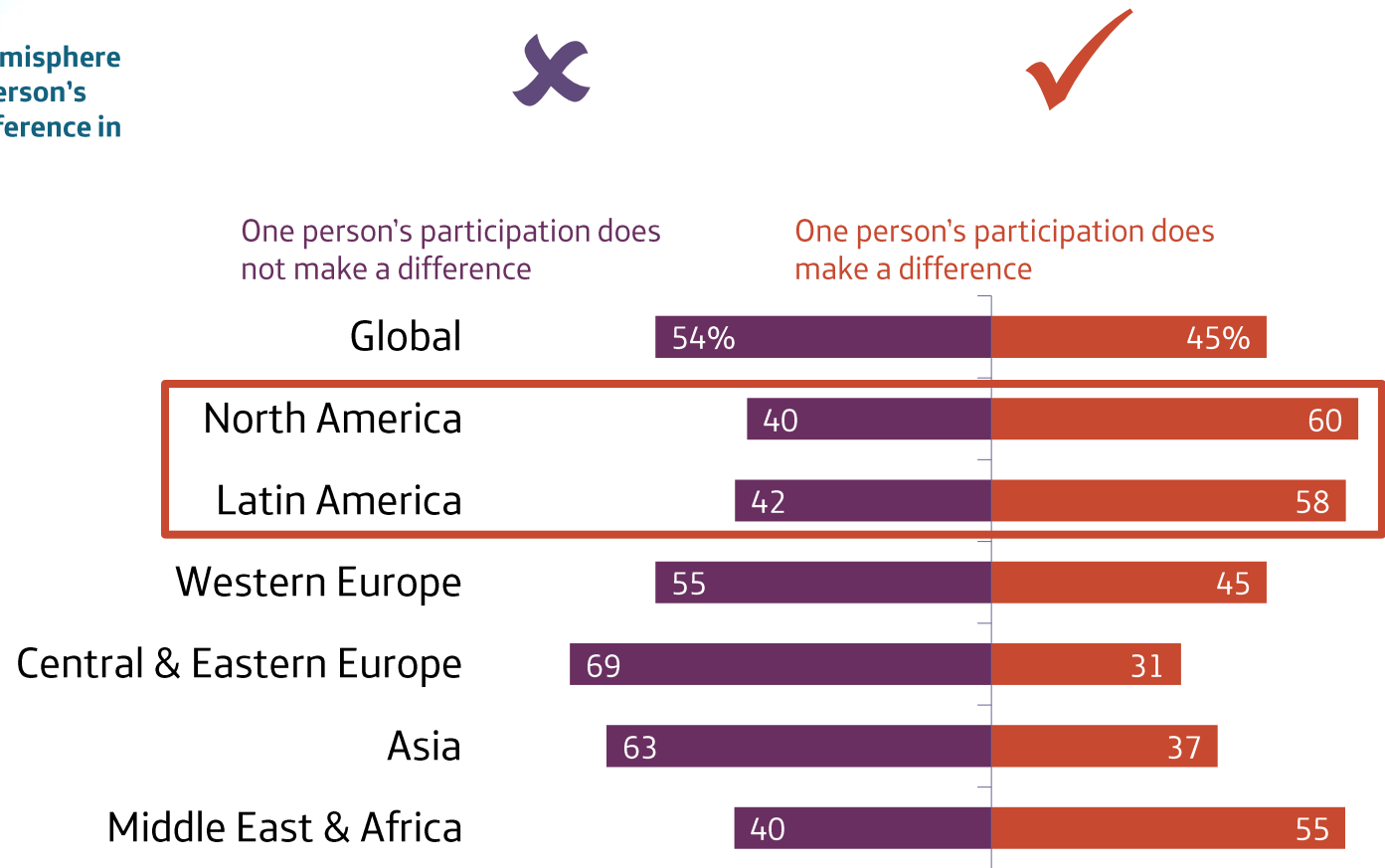
	Colombia	89%
	Mexico	89%
	Venezuela	87%
	Peru	85%
	U.S.	83%
	Brazil	80%
	Canada	78%
	Chile	78%
	Argentina	69%



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

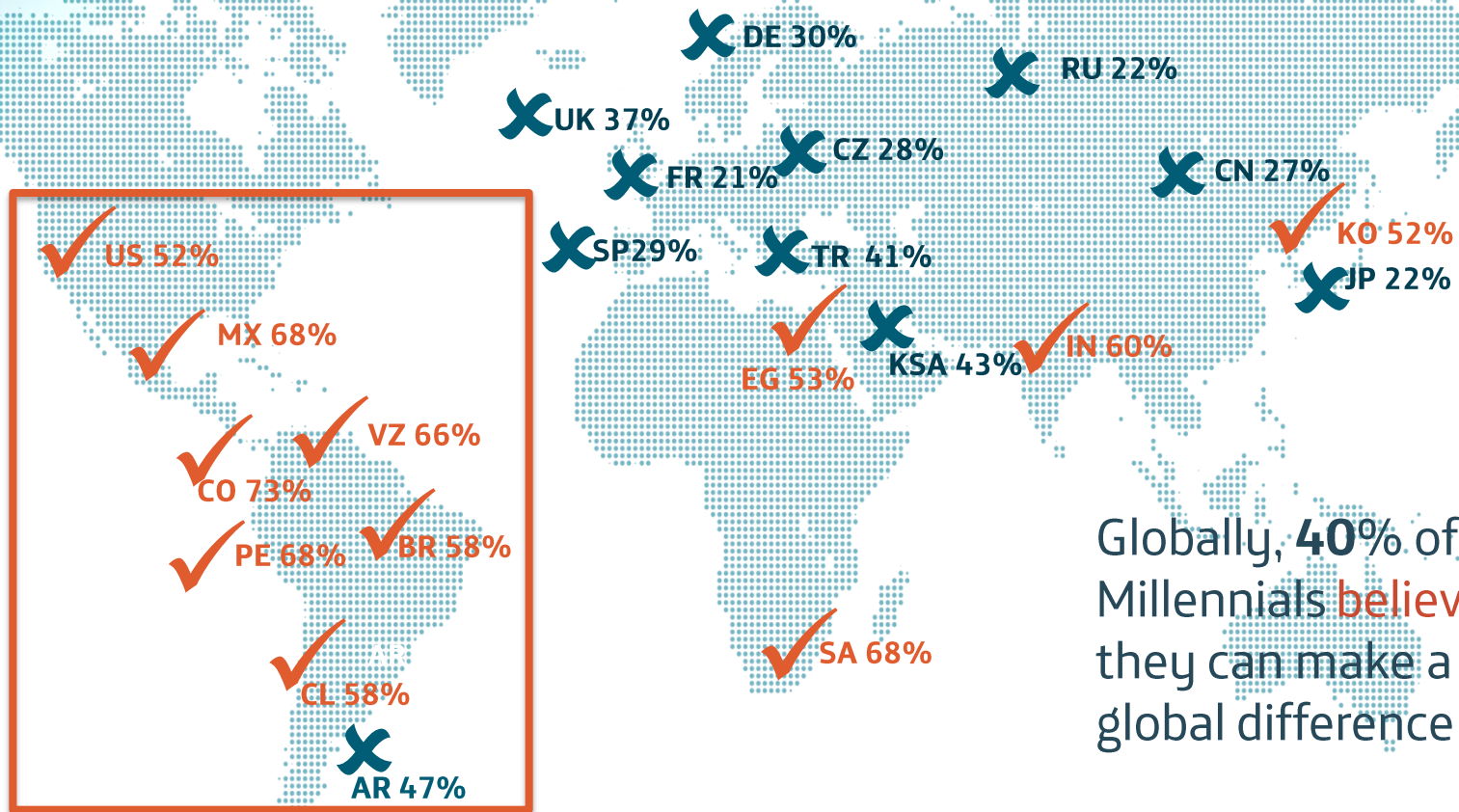
Countries in the Western Hemisphere most strongly believe one person's participation can make a difference in the political system:

	Brazil	63%
	Canada	60%
	U.S.	60%
	Chile	58%
	Venezuela	58%
	Peru	57%
	Mexico	54%
	Colombia	49%
	Argentina	47%



“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

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 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%

11% of
Global
sample =
Millennial
Leaders

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%

20% of
Latin
American
sample =
Millennial
Leaders

16% of
North
American
sample =
Millennial
Leaders

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

Learn more at
www.telefonica.com/millennials

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