

MILLENNIALS:
PART FIVE OF A
SIX-PART SERIES

We are more different than you think

A LOOK AT THE DIVERSITY OF MILLENNIAL IDEAS AND ATTITUDES WITHIN REGIONS, AND THE IMPLICATIONS FOR EMPLOYERS

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Not surprisingly, country-level economics and culture shape how Millennials think about critical career issues. While studies often talk about regions like Asia-Pacific or Western Europe as a unified whole, in truth individual countries within regions often are as different as one region to the next.



A COLLABORATIVE RESEARCH STUDY FROM THE INSEAD EMERGING MARKETS INSTITUTE, THE HEAD FOUNDATION AND UNIVERSUM.

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We undertook a global study of Millennials because we wanted to investigate (and question) what has become conventional wisdom about this digital-savvy generation.

Are stereotypes about Millennials—such as their expectation of advancing rapidly in their careers, or their idealistic focus on work-life balance—really fair? And to what degree are these ideas true across different regions of the globe? Most large-scale Millennial studies have focused on a particular region—often the US, Western Europe and Asia—but we set out to test conventional wisdom across every region of the globe.

Is it fair to think the Asia-Pacific label, for example, represents a unified whole? Do 20-somethings in India feel similarly to those in Japan? Australia? (The answer is self-evident, isn't it?)

In this fifth eBook of a series, we drill down to look at individual countries within each region. How homogenous are regions such as Latin America or Western Europe? How do Millennials differ in their opinions and aspirations country by country?

We also explore whether certain countries in different regions resemble one another—something called twins analysis (see page 71). Are there similar attitudes and outlooks across certain countries, and what do these clusters tell us about how we hire and engage Millennials?¹


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¹ All the regional and global data in this report have been weighted by the share of the population in each country with access to the Internet. For more information about methodology, turn to the last page of this report.

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Examining individual countries within regions

SOME REGIONS SHOW HIGH LEVELS OF DIVERSITY IN ATTITUDES COUNTRY-BY-COUNTRY. WE EXAMINE MORE GRANULAR COUNTRY-LEVEL DETAILS, AND SUGGEST HOW EMPLOYERS CAN ACCOMMODATE THESE DIFFERENCES.

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Asia-Pacific (APAC)

With regards to your future career, how important is empowerment to you?

BEING A PART OF DECISION-MAKING AND HAVING THE FLEXIBILITY TO CHOOSE TASKS.

MALE, SINGAPORE

WE ARE MORE DIFFERENT THAN YOU THINK

There is perhaps no region as diverse as that of the Asian Pacific (APAC). Consider APAC countries like Japan, Singapore, India and Australia—each is a world apart socio-economically and culturally.

There are of course commonalities among APAC Millennials. With the possible exception of Millennials from Indonesia and Japan, most respondents say they expect a higher standard of living than their parents enjoyed (with a regional average of 43 percent strongly agreeing with the statement). It is also striking to see the share of APAC Millennials who expect to retire before the age of 60. Those from Thailand, Malaysia and China report the lowest expected retirement age (over 60 percent say they plan to retire at 60 or earlier); few in the region expect to have to work beyond the age of 65. An interesting exception: 45 percent of Australians say they expect to



work beyond the age of 65. (And of those, nearly 20 percent expect to work past 70.) Some may look at the figure from Australia as a pessimistic one, but it's important to note the older expected retirement age may simply be optimism about personal health and/or a desire to work into later years.

[FIGURE 1](#) / [FIGURE 2](#)

On the whole Japanese Millennials are the biggest outliers in the APAC

region as their responses differ from the others to a degree we didn't see anywhere else (a finding confirmed by previous Universum studies). For example, Millennials from Japan are not nearly as optimistic about enjoying a higher standard of living as their parents did (just nine percent strongly agree, compared to 43 percent for APAC as a whole).

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Asia-Pacific

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In your opinion, what is leadership?

INSPIRING OTHERS TO WORK HARD
TO ACCOMPLISH IMPORTANT TASKS.

MALE, JAPAN



And what motivates Japanese Millennials at work is quite different than their peers in other Asian countries. There is a strong consensus across the APAC countries about wanting to assume positions of leadership (albeit with different motivations for doing so). Only Millennials in Japan see

it differently. Twenty percent of Japanese Millennials claim it's "not important at all" to become a leader/manager during their career, which is much higher than any other APAC country.

We found diverse opinions related to what makes an ideal manager/

leader. A manager who empowers his/her employees is sought after in Singapore (51 percent chose the characteristic compared to 26 percent across the APAC region as a whole); the same quality was not very relevant for neighboring Malaysia (only 11 percent expressed interest in a manager who empowers). Manager fairness (i.e. setting transparent performance criteria and evaluating it objectively) was an important quality in Indonesia (53 percent chose it), but far down the list of priorities in Japan (only 9 percent chose it). [FIGURE 3](#)

APAC Millennials are more or less alone in claiming to listen to their friends' career advice—a finding driven in large part by Millennials in India (43 percent say friends' opinions influence their career decisions), China (28 percent) and Hong Kong (21 percent). [FIGURE 4](#)

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Asia-Pacific

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Do you think it is possible to become a good leader without first being good at teamwork?

IMPOSSIBLE! ONCE YOU BECOME A GOOD TEAM PLAYER, YOU CAN THEN BECOME A GOOD LEADER, AS YOU'LL KNOW WHAT AND HOW EMPLOYEES THINK.

MALE, CHINA

Indian Millennials are also unique in that so many say they heed the career advice of parents (30 percent say parents are very much involved in career decisions, compared to 12 percent on average across all APAC countries).

Asian Millennials believe government has the strongest ability to influence society (which of course may perhaps simply reflect the political situation in these countries); the sentiment is felt most strongly in China (64 percent), Hong Kong (57 percent) and Singapore (52 percent).

Most Asian Millennials define work-life balance as having enough time set aside for their private lives, but the average hides different attitudes country-by-country. In Singapore 76 percent define work-life balance as having leisure time to spend privately, while in Thailand only 29 percent do. Digging deeper,



those from Thailand actually prefer that definition ("leisure time for private life") over any other, which is to say each possible answer simply received fewer responses among Thai Millennials. This suggests the phrase "work-life balance" perhaps does not have the same level of traction in Thailand as in other countries. [FIGURE 5](#)

In our research we found most Millennials prefer to work in teams, but few have taken the concept so much to heart as Millennials from India; 45 percent in India "strongly agree" they prefer team-based work compared to an APAC regional average of 29 percent.

For a generation so often tagged as idealistic and interested in the social good, Millennials in Asia do not stand out as particularly interested in working for the betterment of society. This low average, however, is due in large part to the influence of Chinese Millennials. In China, 14 percent cite "working for the betterment of society" as a priority, versus 34 percent in Vietnam and 37 percent in Indonesia.

One area where Asian Millennials stand out is the importance of having ample time for hobbies.

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In countries like China, Hong Kong, Japan and Vietnam, hobbies are taken very seriously; nearly 40 percent in the APAC region say they would prioritize having time to enjoy hobbies, versus an average of 33 percent globally, and averages below 20 percent in Africa and Central/Eastern Europe. [FIGURE 6](#)

We've spoken little so far about Australian Millennials, but that's because they tend to move in closer step with countries like the UK and US rather than their Asian neighbors.

The most important point we can impress on readers is the need to

treat APAC countries individually. Any attempt to fit Indians and Japanese, for example, into a single mold is bound to end badly. Employers using rigid approaches to navigate the talent markets across APAC will do so at their peril, as a message that resonates well in one market might be irrelevant or even off-putting in another.

APAC is the region where HR marketers need to be most considerate of the need to develop Employer Value Propositions (EVPs) that are effective, and yet still allow for regional/national differentiation. While there must be sufficient sameness and coordination to be recognized as one employer across geographies, the framework must also be flexible enough to allow local markets to find and broadcast a message that works at their level.



Do you think that new ways of leading will be needed in the future?

YES, AS THE NEW GENERATION THINKS DIFFERENTLY.

MALE, HONG KONG

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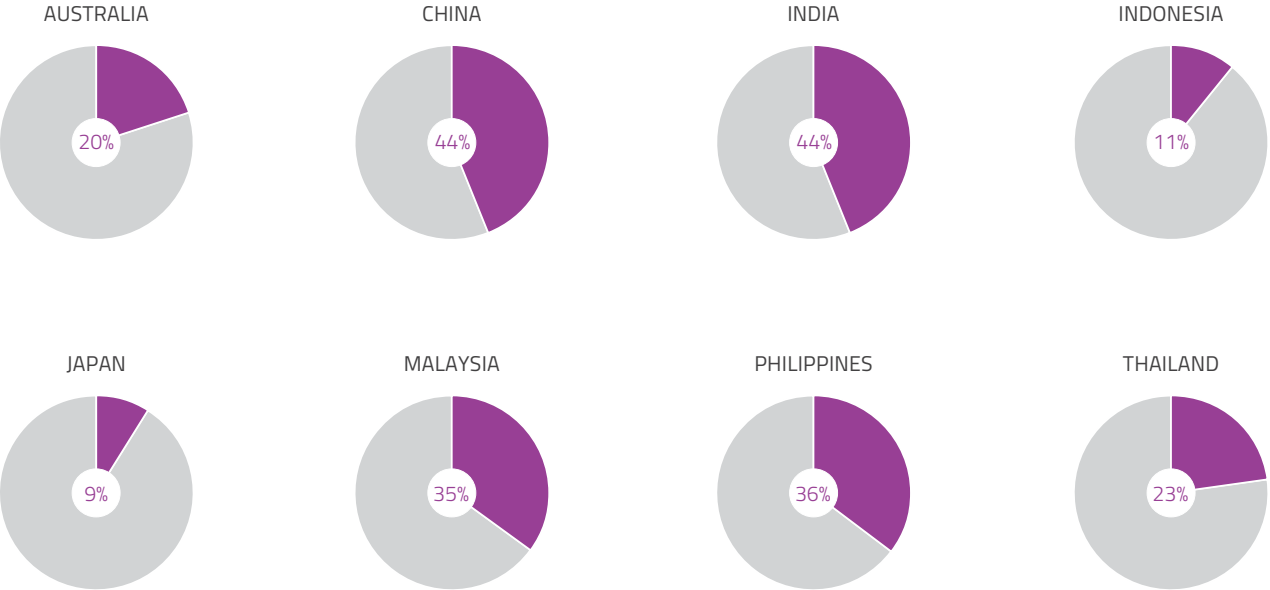
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FIGURE 1
**I WILL ENJOY A HIGHER STANDARD
OF LIVING THAN MY PARENTS**
"Strongly agree" by country, Asia-Pacific

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For a full list of countries studied within Asia-Pacific, consult the methodology section on page 71.

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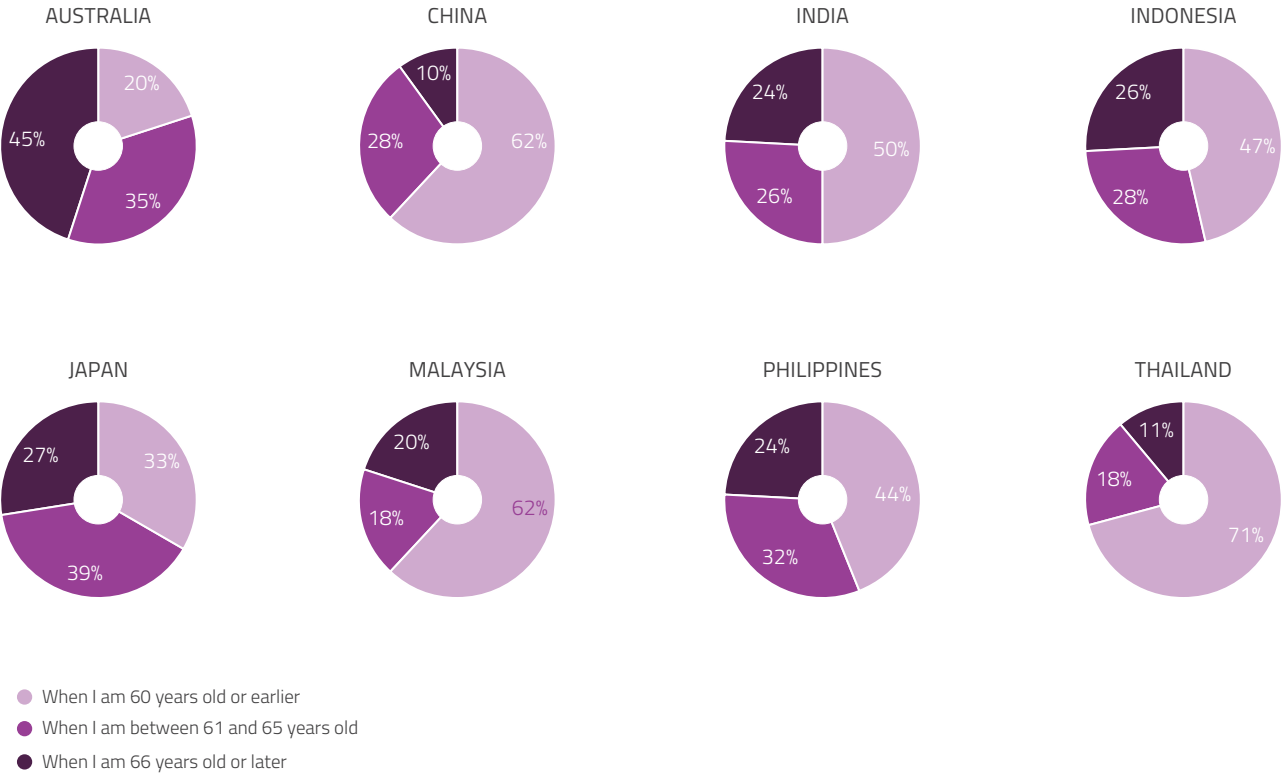
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FIGURE 2
AT WHAT AGE WILL I RETIRE?

By country, Asia-Pacific



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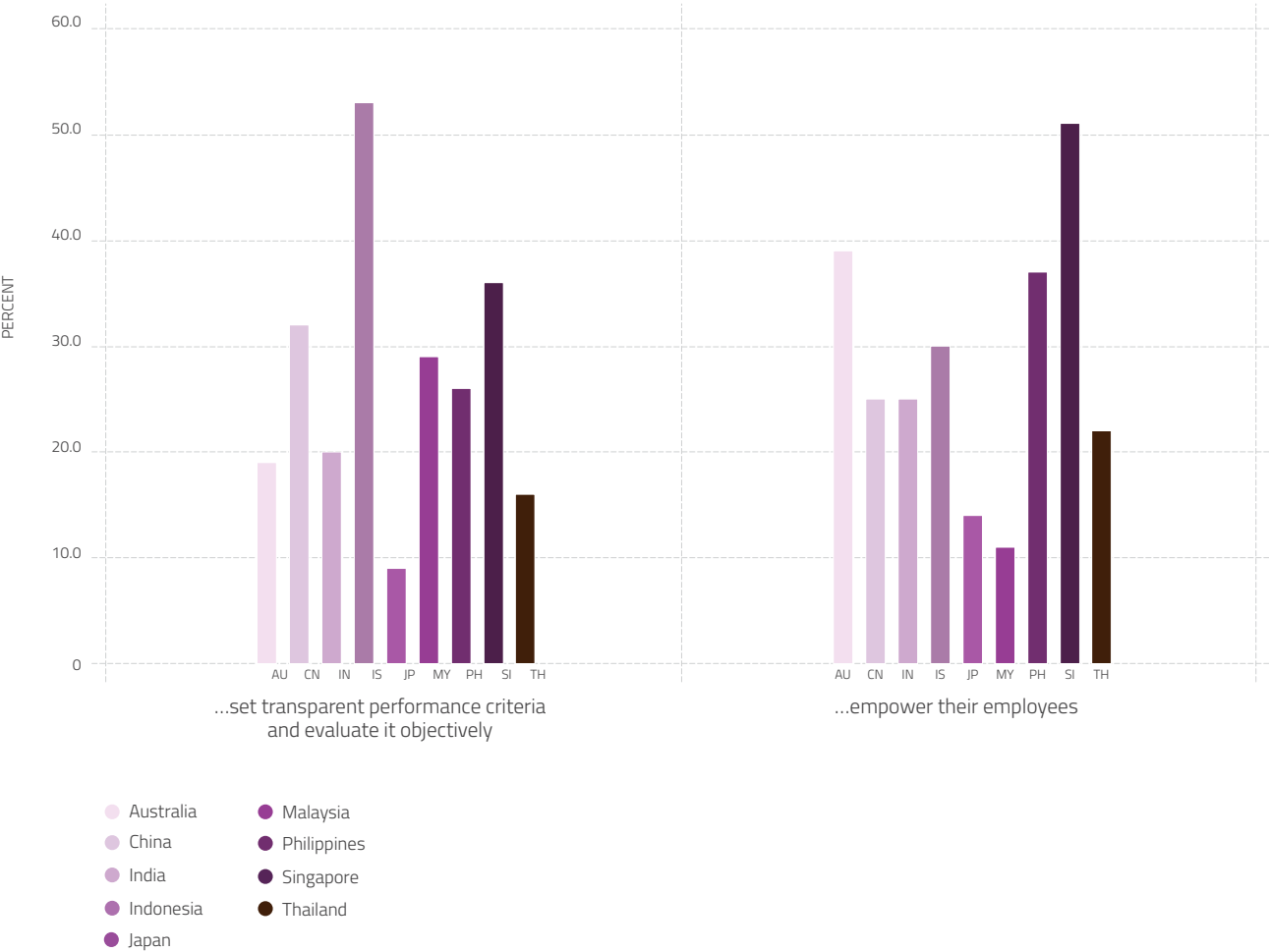
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FIGURE 3
IF YOU WERE ABLE TO CHOOSE YOUR MANAGER, WHICH OF THE FOLLOWING WOULD BE MOST IMPORTANT TO YOU?

In the APAC region, Millennials value varying qualities in managers country-by-country. Top 2 choices, Asia-Pacific

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FIGURE 4
HOW MUCH DO FRIENDS INFLUENCE YOUR CAREER DECISIONS?

India most likely to report friends influence career; Hong Kong and Vietnam least likely, Asia-Pacific

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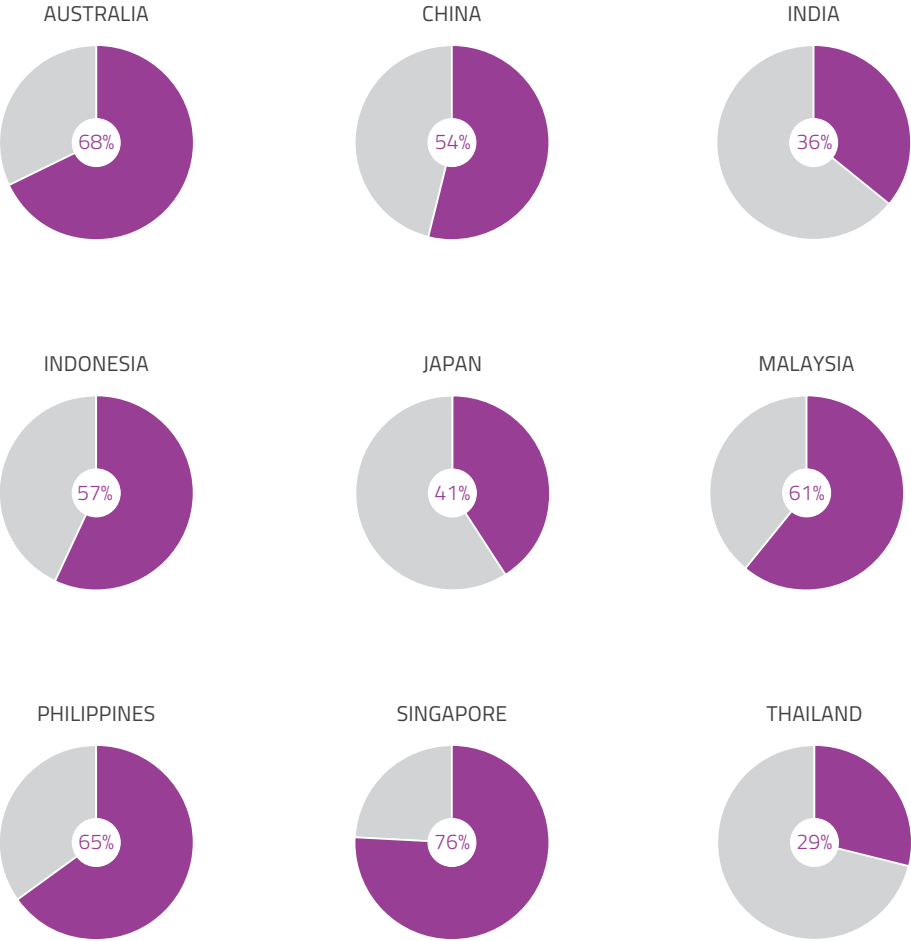
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FIGURE 5
**WHAT DOES WORK-LIFE
BALANCE MEAN TO YOU?**

Top choice – “Enough leisure time for my private life” by country, Asia-Pacific

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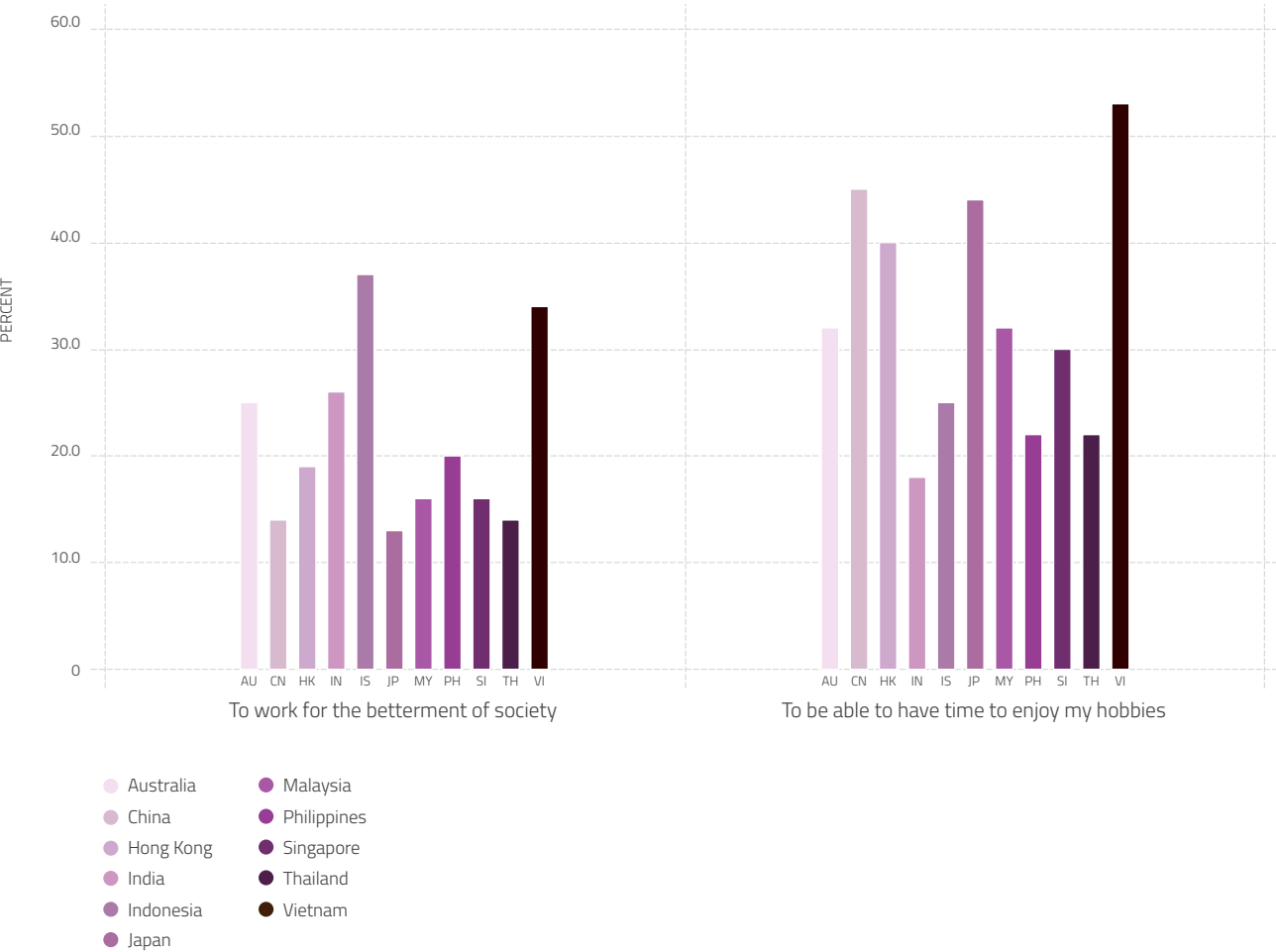
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FIGURE 6
IF YOU COULD PRIORITIZE YOUR LIFE, WHAT WOULD YOU EMPHASIZE?
Top 2 alternatives with biggest difference to global average, Asia-Pacific

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Africa

With regards to your future career, how important is empowerment to you?

GIVING OPPORTUNITIES TO DISADVANTAGED PEOPLE AND ALLOWING THEM TO PROVE THEMSELVES.

FEMALE, SOUTH AFRICA

WE ARE MORE DIFFERENT THAN YOU THINK

Before diving into the details of the survey results for the African continent, we need to issue an important caveat. Naturally, we do not believe it possible to capture the complexity of a continent with 47 countries using data from merely

the largest two; that said, in order to communicate results in brief, we narrowed our focus to Nigeria and South Africa (the continent's two focal points of business activity, accounting together for roughly one third of African GDP).



For Nigerian Millennials, what stands out most is their fragmentation—or the degree to which a significant portion of respondents occupied two extreme ends of a 5-point scale. This tendency is not as strong in South Africa.

For example, when asked to what extent friends' opinions influence career decisions, 16 percent of Nigerian Millennials reported “a lot” and 29 percent chose “not much at all!” (Whereas the figures for South Africa are 3 percent and 38 percent, respectively.) In another example, we asked to what extent Millennials want work autonomously; 32 percent of Nigerian Millennials strongly agreed and 19 percent strongly disagreed. The same extremes for South Africa were 18 percent and 5 percent, respectively. [FIGURE 7](#)

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Africa

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Who is a better leader:
a generalist or a specialist?

**SPECIALIST, THEY HAVE A BETTER
UNDERSTANDING OF WHAT TO
EXPECT AND HOW TO DEAL WITH IT.**

FEMALE, SOUTH AFRICA

We also found South Africa aligns much more with North America and Western Europe when it comes to major talent topic areas. For example, compared to Nigerian Millennials, South Africans are much less likely to say their parents influence their career decisions (16 percent of South Africans say parents are very involved compared to 52 percent in Nigeria) or to describe themselves as entrepreneurial (27 percent strongly see themselves as entrepreneurial versus 52 percent in Nigeria). However, Millennials in both countries agree that the most attractive aspect of assuming a managerial role is the opportunity to coach and mentor others, a finding very much unlike other regions of the globe (41 percent in Nigeria and 49 percent in South Africa believe mentoring others is the most attractive aspect of leadership, compared to the global average of 22 percent). [FIGURE 8](#)



In addition, Nigerian Millennials stand out in that they want a manager to be a role model (37 percent of Nigerians cite the quality versus 25 percent in South Africa), whereas South African Millennials are most likely to favor being empowered by their leaders (53 percent cite it versus 20 percent in Nigeria). [FIGURE 9](#)

Millennials in both countries are most likely to define challenging work as an occupation that takes them out of their comfort zone (34 percent). [FIGURE 10](#)

African Millennials also stand out as wanting to work for the betterment of society (important to 36 percent in Africa versus 22 percent globally). Millennials in Nigeria and South Africa say if given the chance to prioritize, having a successful career would be a top consideration (56 percent name it compared to 38 percent globally). Those in South Africa are more likely to elevate time with family above career compared to those from Nigeria, but responses from both were not very different. Unlike their peers in Asia, African Millennials don't seem particularly interested in cultivating hobbies (only 11 percent listed it as a priority versus 38 percent in APAC). [FIGURE 11](#)

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Do you think people in your generation will be able to lead a more balanced life than previous generations?

YES, COMPANIES NOW HAVE FLEXIBLE WORKING CONDITIONS AND TECHNOLOGY ALSO PLAYS A MAJOR ROLE IN ALLOWING THIS. ANOTHER THING IS THAT OUR GENERATION IS MORE FLEXIBLE WITH THEIR THINKING AND PLANNING.

FEMALE, SOUTH AFRICA



Regarding the concept of work-life balance, Nigerians and South Africans differ significantly. South Africans most often associate work-life balance with a convenient work location (41 percent in South Africa define it as such versus 36 percent in Nigeria), and with flexible work hours (50 percent cite it in South Africa versus 19 percent in Nigeria). South Africans also see respect for employees as being part of the work-life balance definition (50 percent versus 24 percent in Nigeria). Nigerians, on the other hand, value childcare offerings and opportunities for part time work slightly more than their peers in South Africa.

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FIGURE 7
HOW MUCH DO YOUR FRIENDS' OPINIONS INFLUENCE YOUR CAREER DECISIONS?

By country, Africa

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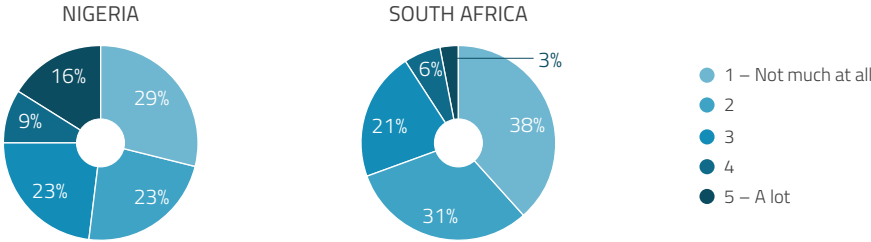
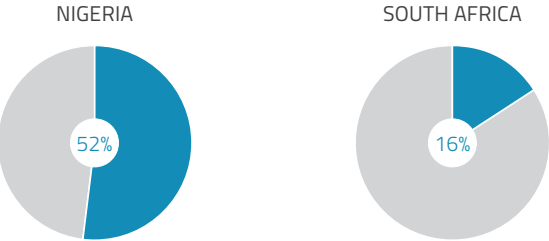


FIGURE 8
HOW INVOLVED ARE YOUR PARENTS IN YOUR CAREER DECISIONS?

“Very much involved” by country, Africa

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FIGURE 9
IF YOU COULD CHOOSE YOUR MANAGER, WHAT QUALITIES WOULD YOU PREFER?
By country, Africa

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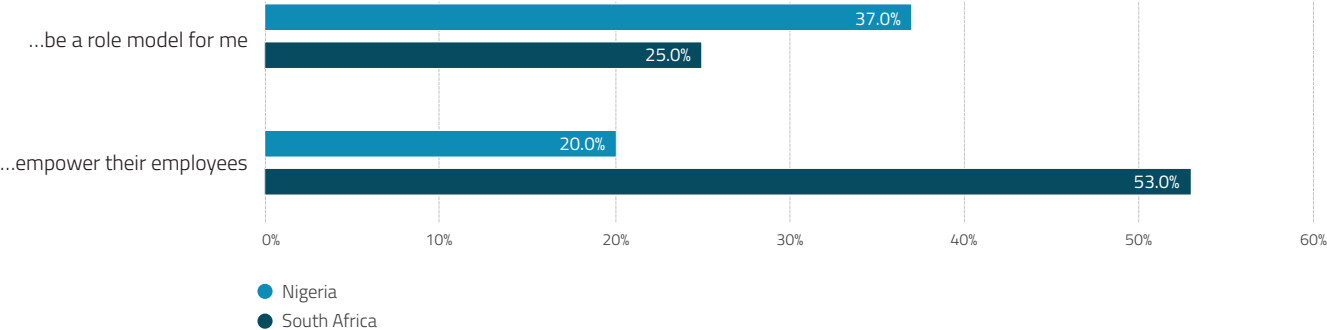
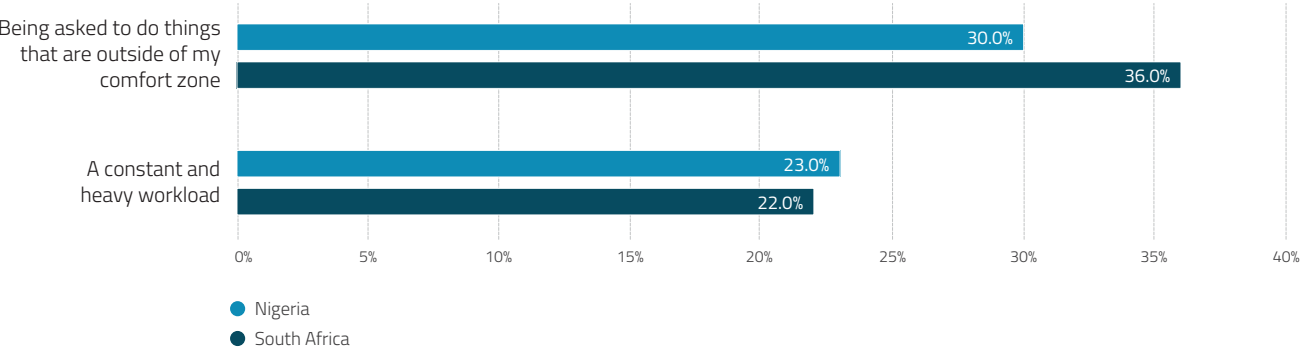


FIGURE 10
WHAT DEFINES CHALLENGING WORK?
By country, Africa

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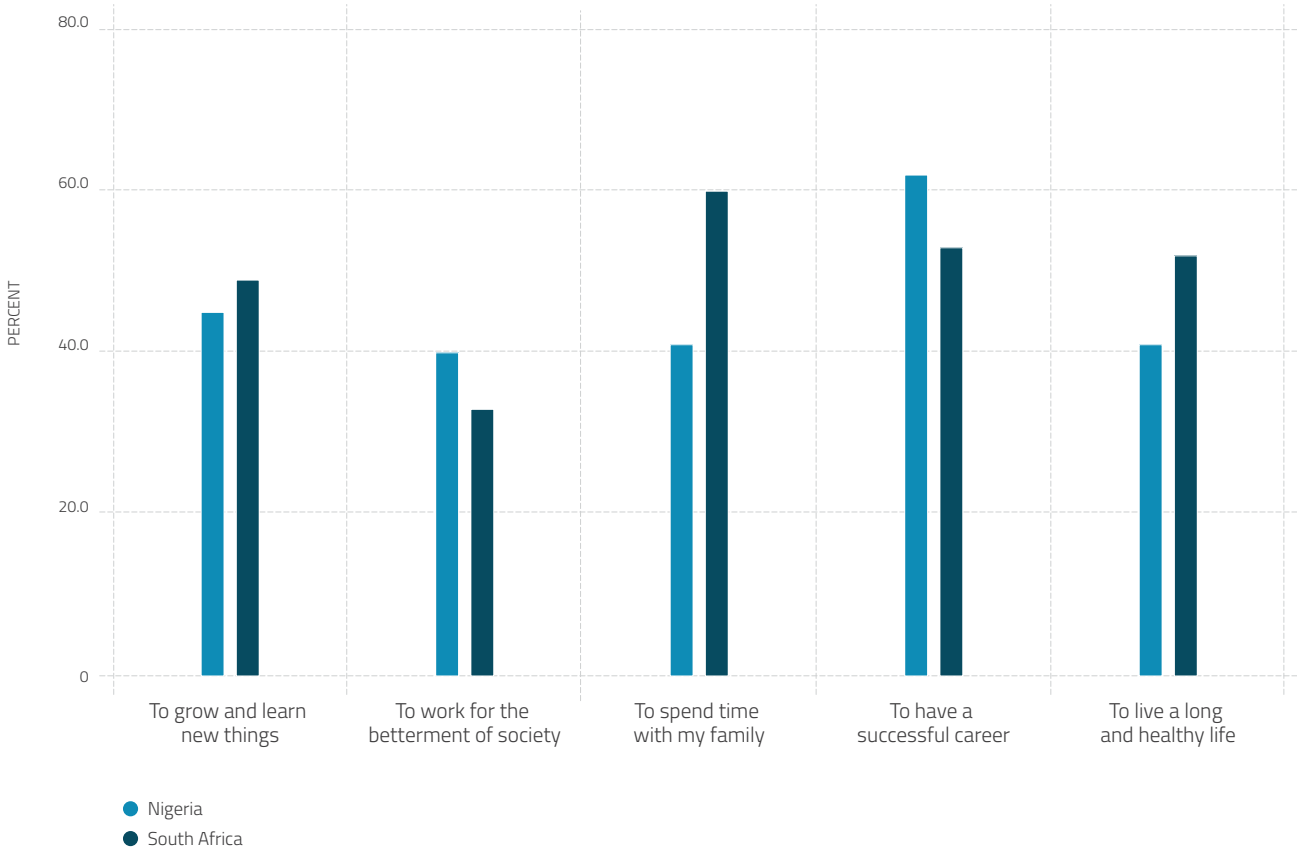
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FIGURE 11
**IF YOU COULD PRIORITIZE YOUR LIFE,
WHAT WOULD YOU EMPHASIZE?**
Top 5 choices by country, Africa

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Central/Eastern Europe

What does work-life balance mean to you?

TIME TO WORK AND TIME TO RELAX.

FEMALE, RUSSIA

WE ARE MORE DIFFERENT THAN YOU THINK

For this study, respondents from the Central and Eastern Europe region come from Russia, Poland and the Czech Republic. Of these three countries, Russia is most often the outlier. Millennials from the Czech Republic tend to resemble those from Western Europe, while responses from Poland typically lie between those from Russia and the Czech Republic.

When asked how much they care about work titles, Russian Millennials seem largely uninterested in titles (42 percent say it's not important at all), whereas titles seem relatively more important in the Czech Republic, where 24 percent cite titles as "very important"). Russian Millennials are much more attracted to leadership roles (36 percent consider them very important) than Poles and Czechs

(17 percent and 18 percent say becoming a manager/leader is very important, respectively). High future earnings are considered the most attractive part of being a manager/leader for more than half of Russian Millennials, whereas compensation is seen as an appealing perk for 32 percent of Czechs.

[FIGURE 12](#) / [FIGURE 13](#)

Russians view themselves as more entrepreneurial than their peers; 23 percent strongly agree they are entrepreneurial, versus just 15 percent in Poland and 6 percent in the Czech Republic. Moreover, Russians seem more willing to endure stress and longer working days to reach leadership positions (30 percent strongly agree they are up to the challenge compared to 17 percent in Poland and 3 percent in the Czech Republic). [FIGURE 14](#) /

[FIGURE 15](#)



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Central/Eastern Europe

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What does work-life balance mean to you?

WORK DOES NOT MOVE HOME AND PERSONAL MATTERS DON'T SHOW UP TO WORK.

MALE, POLAND

Finally, Russians (59 percent) and Poles (56 percent) favor having a manager who's a technical or functional expert, whereas Czech Millennials prefer managers who empower them (39 percent versus 6 percent in Poland and 14 percent in Russia). [FIGURE 16](#)

When choosing their definition of challenging work, more than half of Russian Millennials (57 percent) want to work with talented people who inspire them; Polish Millennials (64 percent) want to learn new things; and Czech Millennials (39 percent) typically want to be involved in innovative work.

[FIGURE 17](#)

Russian Millennials are more confident about the prospects of enjoying a better standard of living than their parents (62 percent strongly agree they will be better off

than their parents, compared to 24 percent in Poland and 34 percent in the Czech Republic). [FIGURE 18](#)

Few Millennials in Central and Eastern Europe see parents or friends as having a high degree of influence on their career decisions. In fact, they stand out globally in that many do not consider family an important support system for their career (33 percent in Central/Eastern Europe say parents are not involved at all compared to the global average of 15 percent).

Regarding who or what has the most influence on society, 54 percent of Polish Millennials and 42 percent of those from the Czech Republic believe private business is most influential, whereas 45 percent of Russians see individuals as most influential. [FIGURE 19](#)

We asked Millennials about their priorities in life, and the answers from Central and Eastern Europe were particularly interesting. A top choice for all three countries was "to grow and learn new things" (on average 55 percent of Millennials in Central/Eastern Europe chose this response). In Russia, respondents were much more likely to say they would also emphasize being wealthy (36 percent cited it among Russians, versus 15 and 14 percent in the Czech Republic and Poland).

[FIGURE 20](#)

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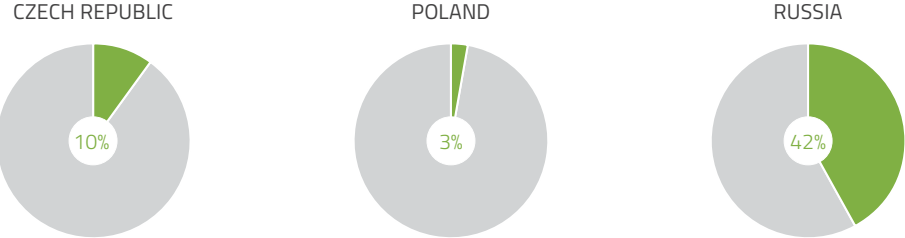
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FIGURE 12
HOW IMPORTANT ARE TITLES?

“Not important at all” by country,
Central/Eastern Europe



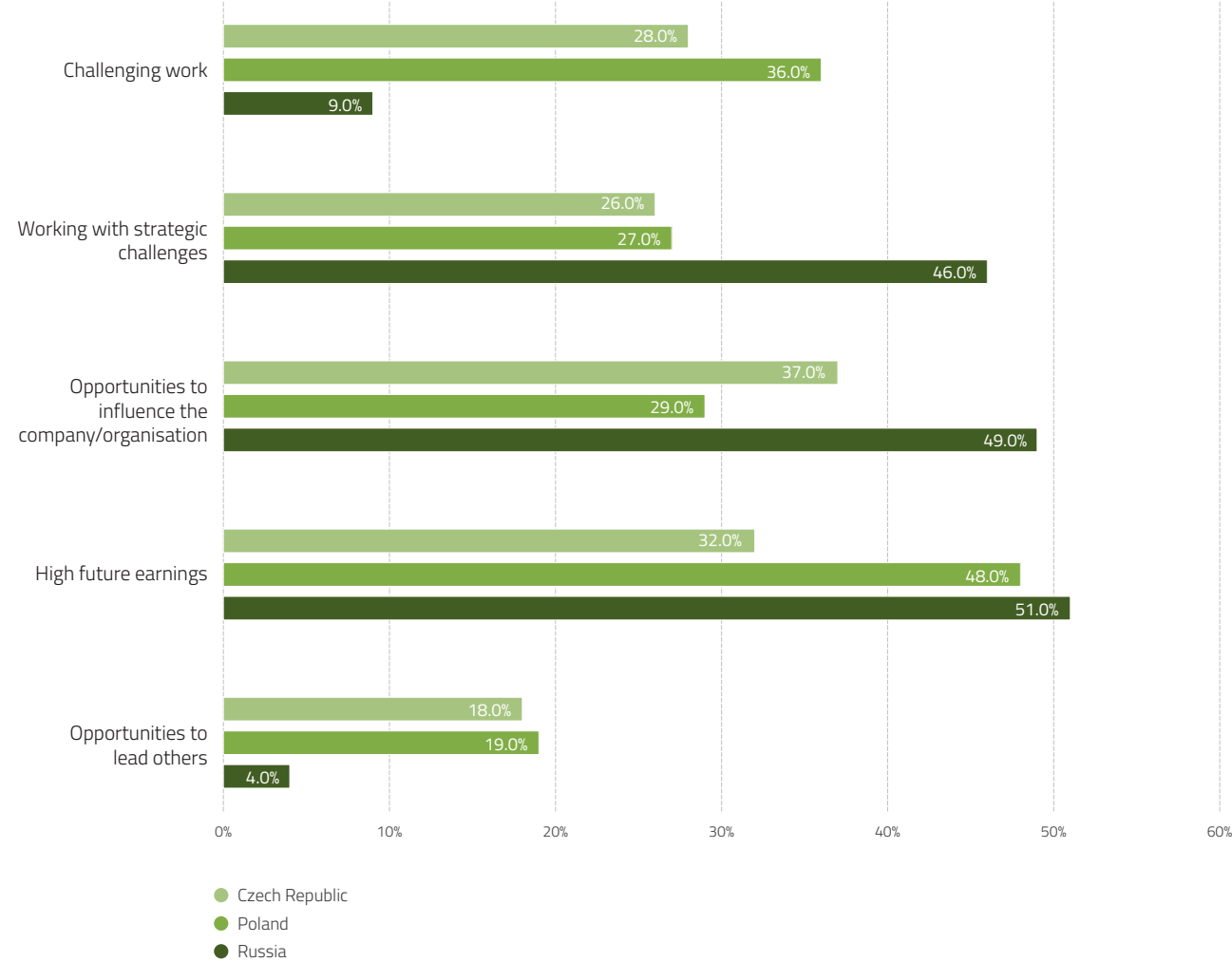
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FIGURE 13
**WHAT IS IT YOU CONSIDER MOST ATTRACTIVE
IN A MANAGERIAL/LEADERSHIP ROLE?**

By country, Central/Eastern Europe

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FIGURE 14
I AM AN ENTREPRENEURIAL PERSON

"Strongly agree" by country,
Central/Eastern Europe

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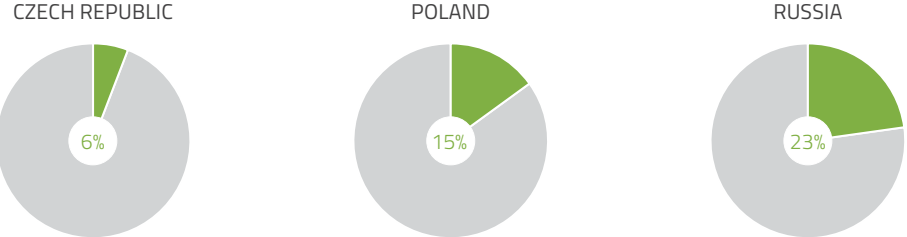
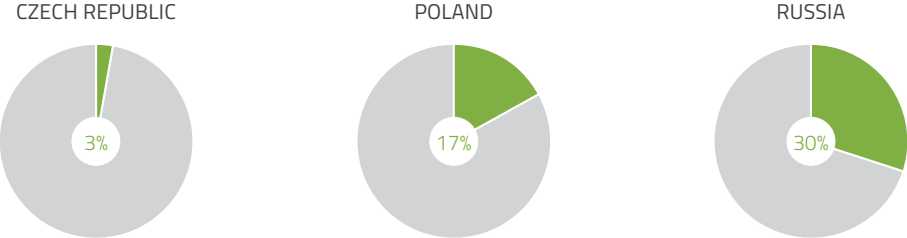


FIGURE 15
I'M UP FOR THE EXTRA WORK AND STRESS OF BEING A LEADER

"Strongly agree" by country,
Central/Eastern Europe

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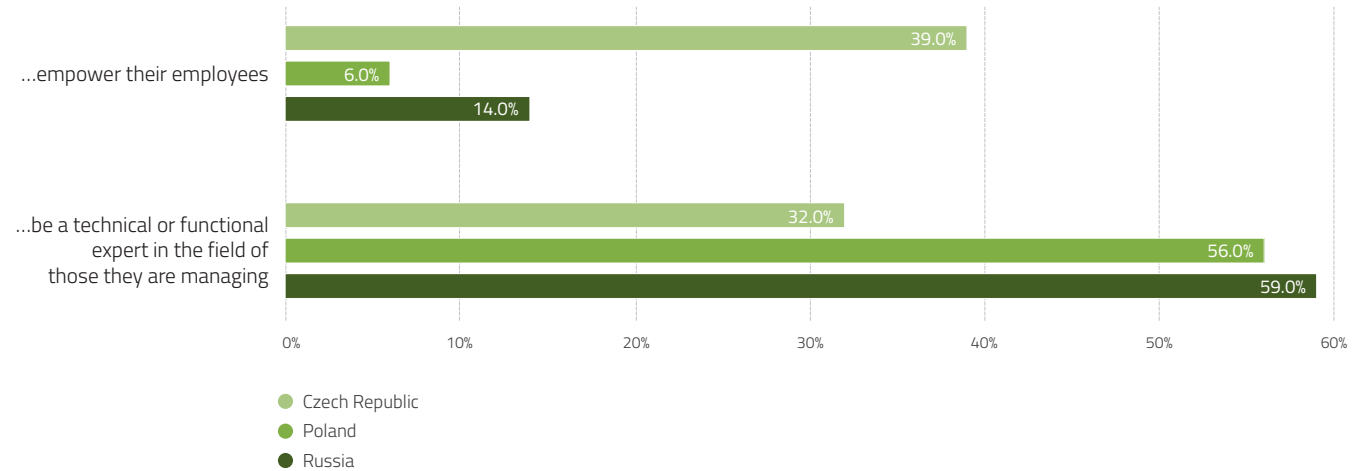
FIGURE 16

WHAT'S MOST IMPORTANT IN A MANAGER?

By country, Central/Eastern Europe



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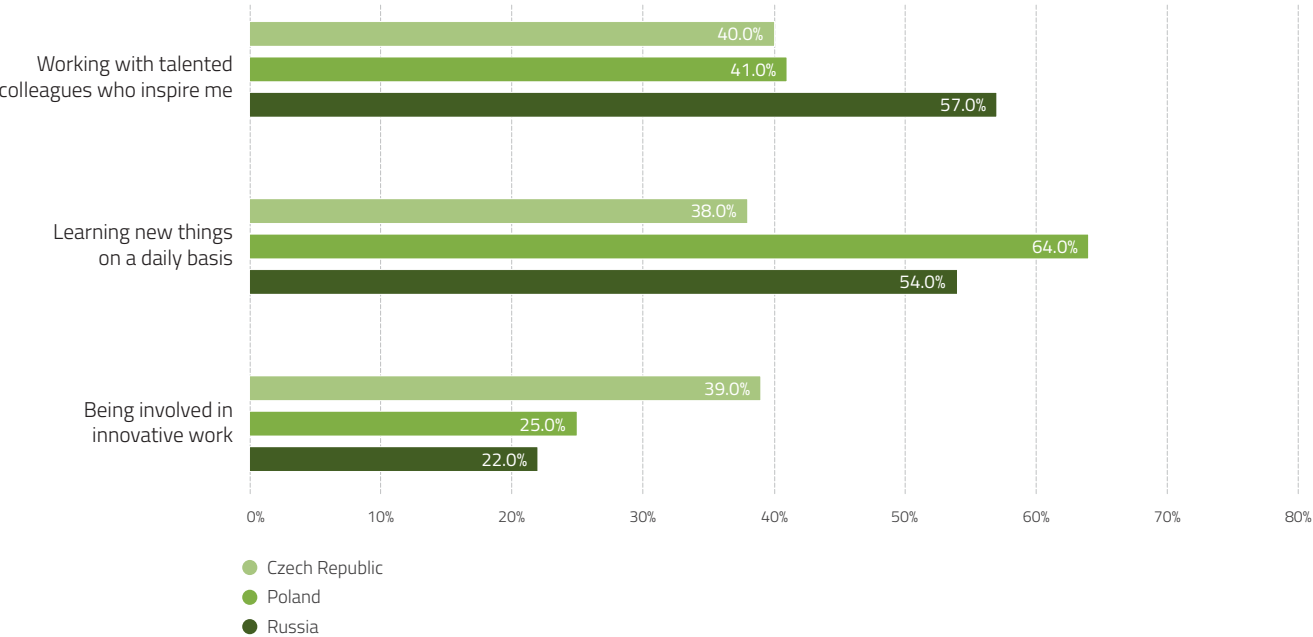
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FIGURE 17
**WHICH OF THE FOLLOWING STATEMENTS
BEST DEFINE CHALLENGING WORK TO YOU?**

Top 3 choices by country,
Central/Eastern Europe



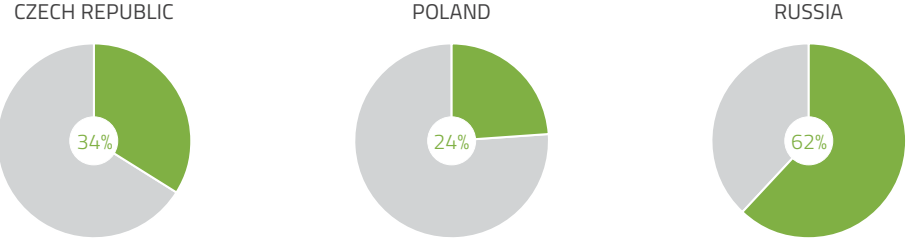
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FIGURE 18
**I WILL ENJOY A HIGHER STANDARD
OF LIVING THAN MY PARENTS DID?**

“Strongly agree” by country,
Central/Eastern Europe

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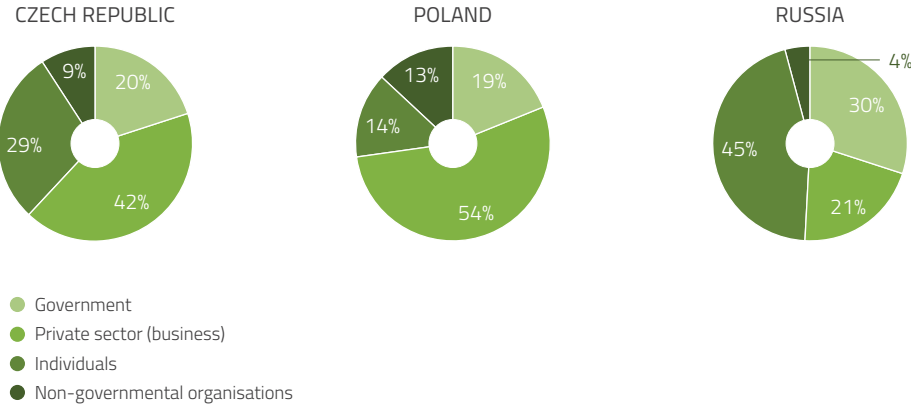
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FIGURE 19
WHO OR WHAT MOST INFLUENCES SOCIETY?

Top choice by country, Central/Eastern Europe



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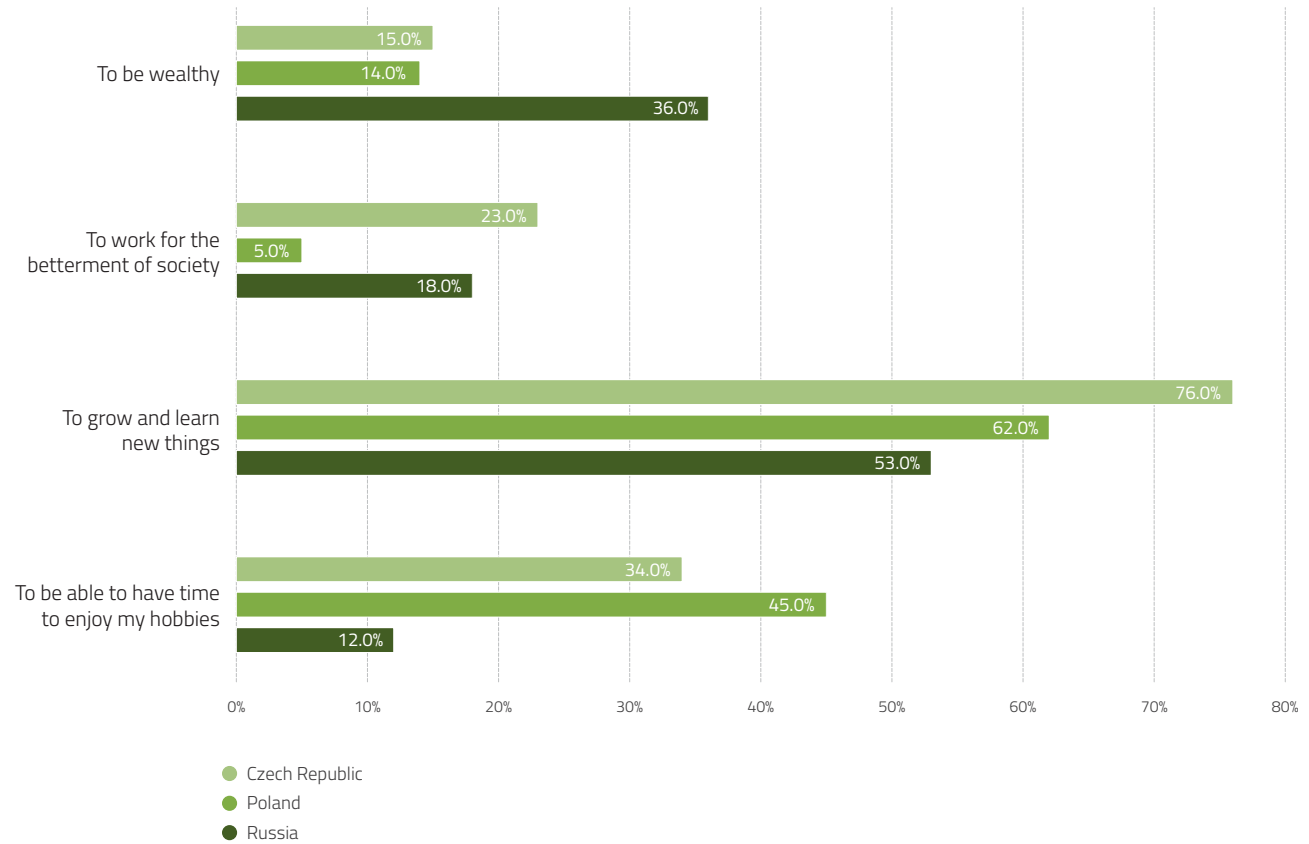
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FIGURE 20

IF GIVEN THE CHANCE TO PRIORITIZE, WHAT WOULD YOU EMPHASIZE?

Biggest differences to global average and top choice by country, Central/Eastern Europe



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Latin America

What does autonomy mean to you?

MEANS THAT YOU CAN WORK
AS YOU WANT, AS LONG AS YOU
GET WHERE YOU SHOULD BE.

MALE, BRAZIL

WE ARE MORE DIFFERENT THAN YOU THINK



Although Latin American extends from Mexico in the north to Chile and Argentina in the south—a massive span of geography—the preferences and opinions of Latin American Millennials are not as diverse as other regions.

Beginning with those areas where Millennials tend to have similar views, Latin Americans generally believe job titles are important (63 percent of Latin American Millennials say so compared to 55 percent globally). They also believe business should contribute more to society (a notion that is particularly strong in Colombia, where 71 percent agree with the statement). On average 41 percent of Latin American Millennials feel individuals rather than government or private business have the strongest ability to influence society, whereas 24 percent of Millennials globally think the same. [FIGURE 21](#) /

[FIGURE 22](#)

The largest proportion of Latinos define challenging work as learning new things, whereas Brazilian Millennials associate it more often with stepping out of one's comfort zone. [FIGURE 23](#)

The majority of Latinos (76 percent) expect to have a higher standard of living than their parents did; the number is lowest in Argentina, where 33 percent agree with the statement. Intriguingly, Millennials are perhaps most fragmented with regards to parental influence. When asked how involved parents are in Millennial career decisions, respondents from countries like Chile and Colombia are fragmented; a significant percent agree (25 percent in Chile and 21 percent in Colombia) and another significant percent disagree (17 percent in both countries). Nevertheless, the majority (71 percent) agree that

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Latin America

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With regards to your future career,
how important is empowerment to you?

INCREASING PEOPLE'S ABILITY
TO MAKE CHOICES AND TAKE
DESIRED ACTIONS.

MALE, MEXICO

parents are an important source of support. [FIGURE 24](#) / [FIGURE 25](#)

Latin American Millennials are more enthusiastic to reach leadership positions than their counterparts

in North America, Central/Eastern Europe and in Western Europe. Some 49 percent say it's "very important" for them to become a manager or leader during their career, compared to 40 percent in



North America, 32 percent in Central and Eastern Europe and 30 percent in Western Europe. Latin Americans largely prefer their managers to be empowering (except in Brazil where it's only important for 12 percent). Brazilians, however, tend to favor managers who behave like role models (chosen by 46 percent). [FIGURE 26](#)

Interestingly, Millennials in Brazil (61 percent) and Mexico (53 percent) are more likely to believe their employer's organizational structure should match their own personalities. Also, Mexican Millennials care more than others in Latin America about how entrepreneurial their employer is (a trait cited by 56 percent of Mexicans).

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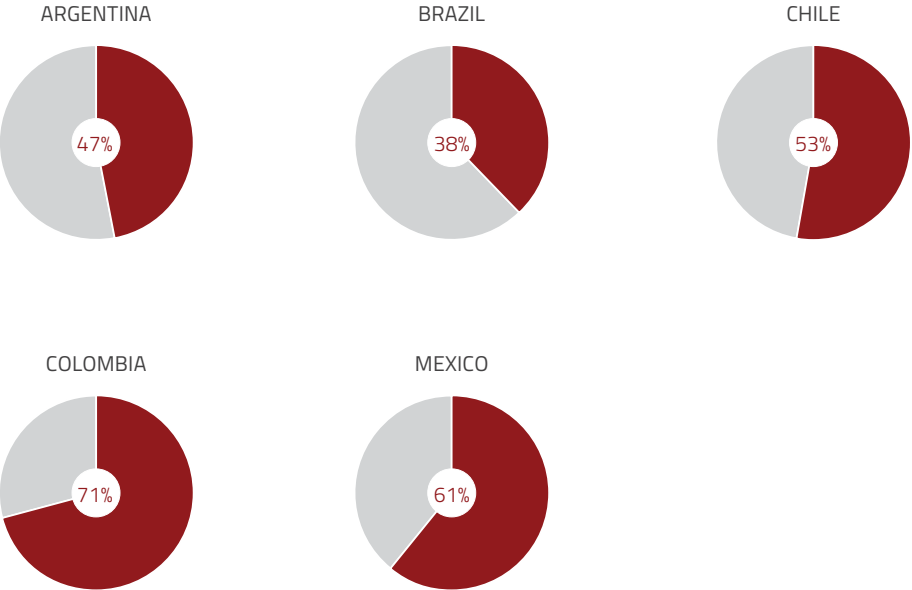
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FIGURE 21
BUSINESS SHOULD CONTRIBUTE MORE TO SOCIETY

“Strongly agree” by country, Latin America



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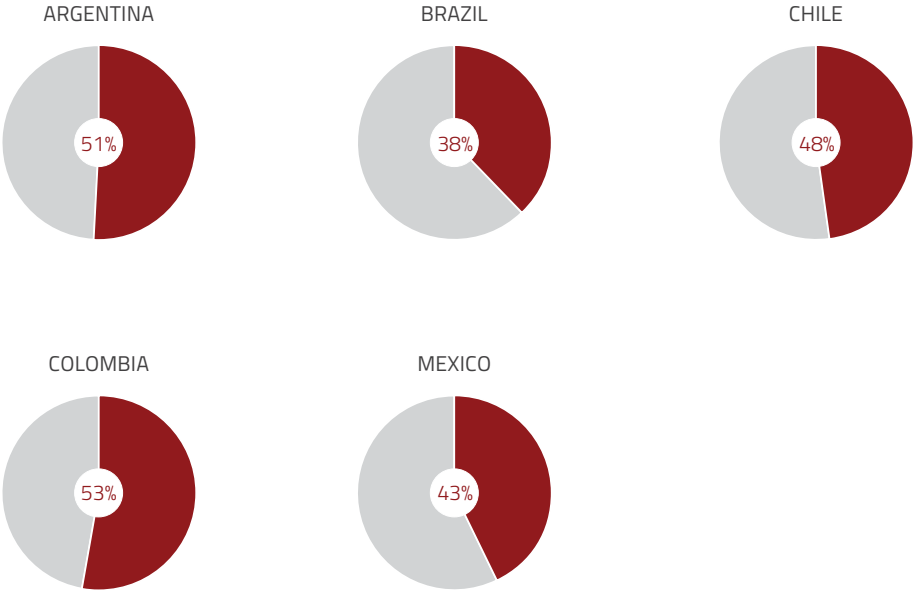
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FIGURE 22
WHO OR WHAT HAS THE STRONGEST ABILITY TO INFLUENCE SOCIETY?

“Individuals” by country, Latin America



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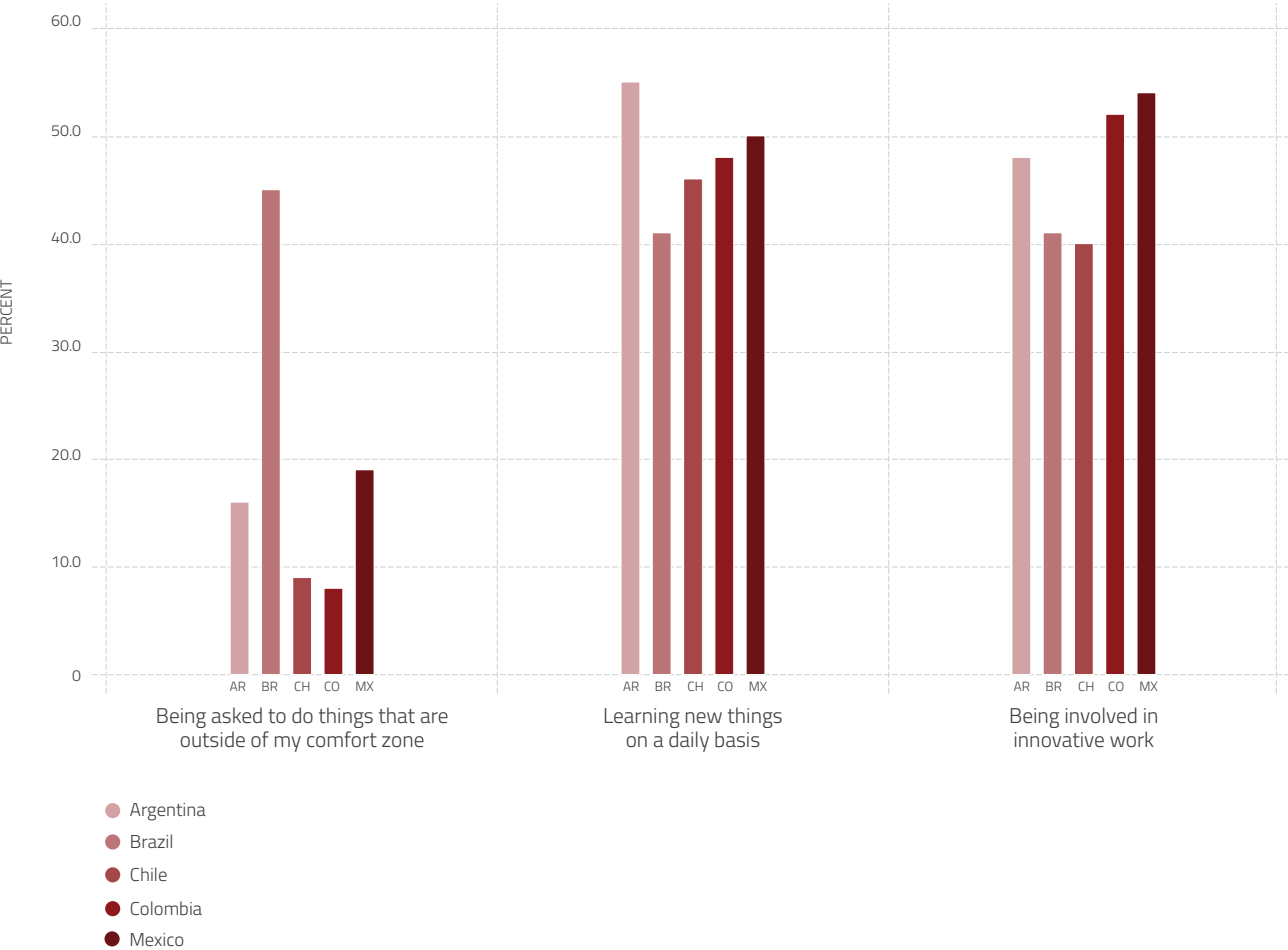
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FIGURE 23
WHAT DEFINES CHALLENGING WORK TO YOU?

Top 3 choices by country, Latin America

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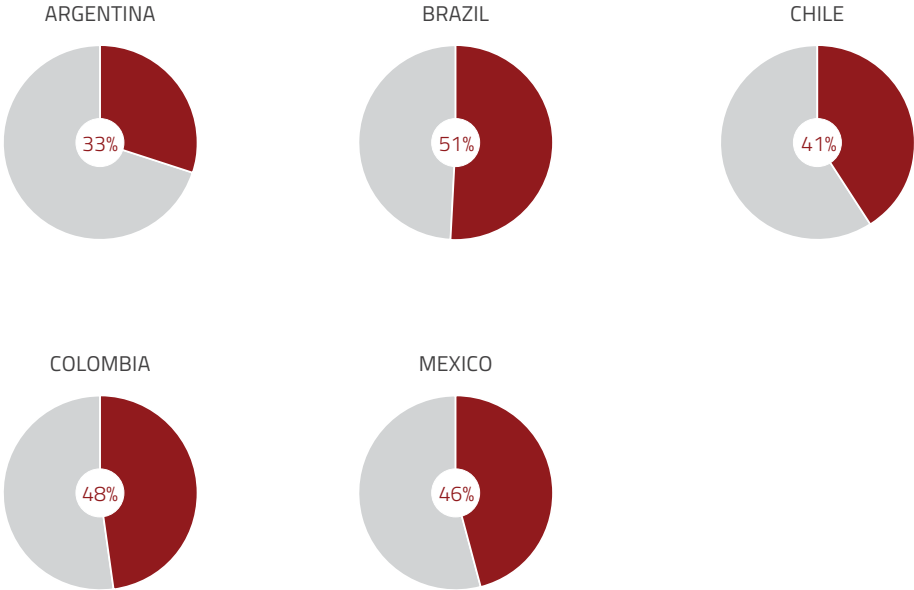
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FIGURE 24
**I WILL ENJOY A HIGHER STANDARD
OF LIVING THAN MY PARENTS**
“Strongly agree” by country, Latin America

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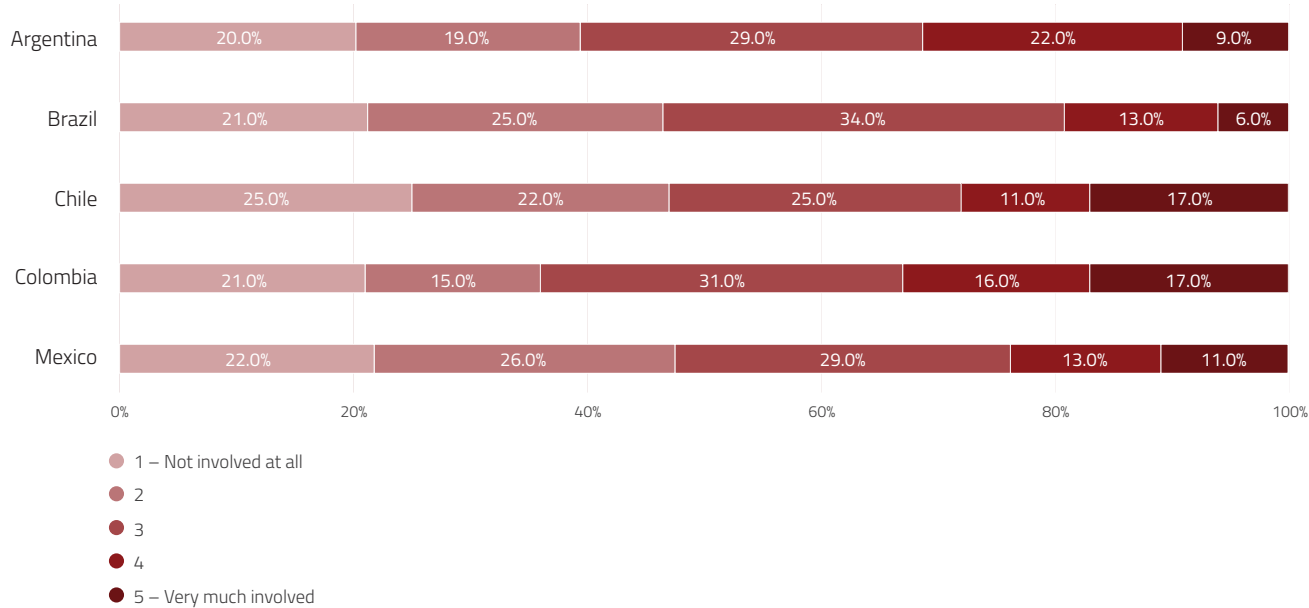
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FIGURE 25
MY PARENTS ARE VERY MUCH INVOLVED
IN MY CAREER DECISIONS.

“Very involved” by country, Latin America

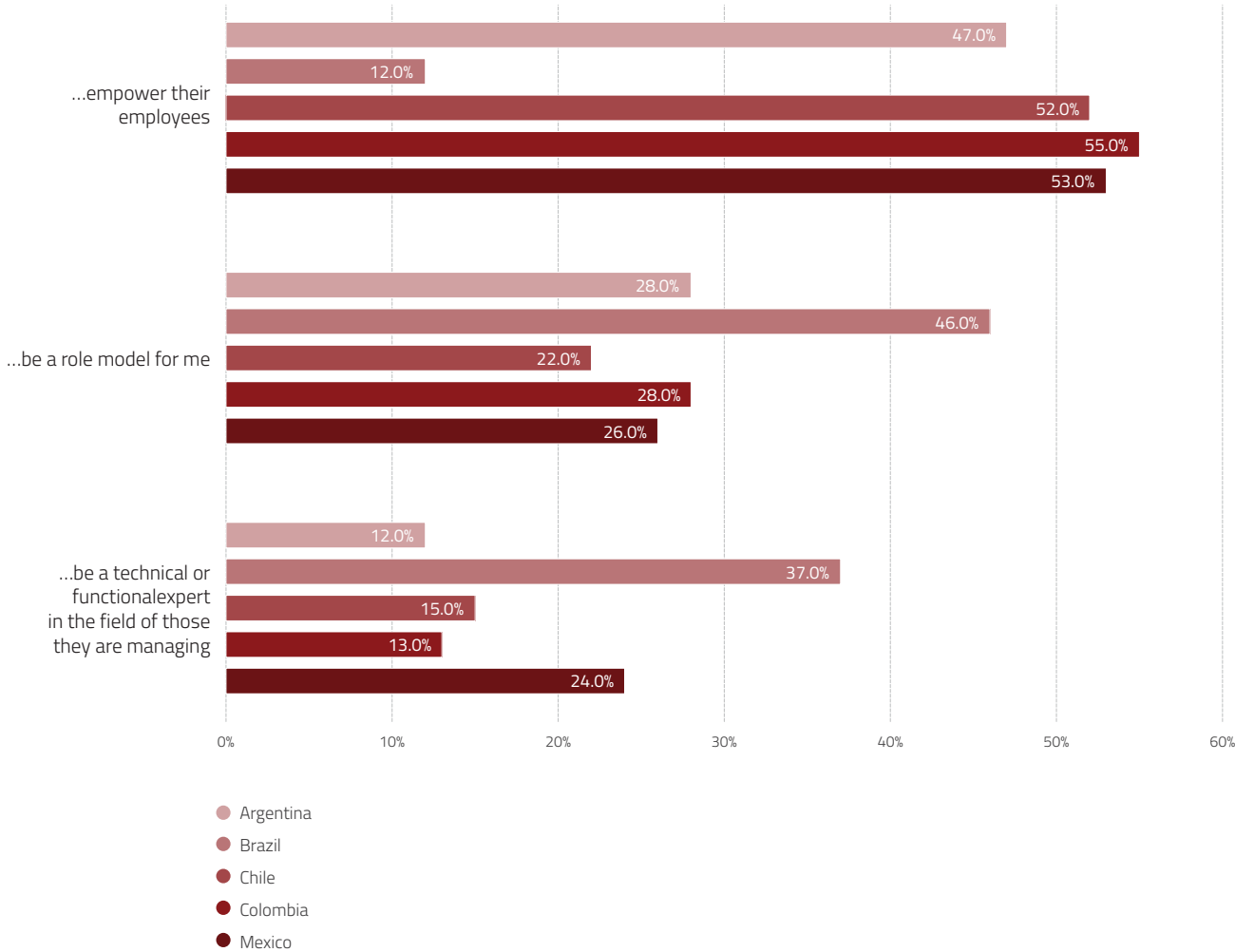


For a full list of countries studied within Latin America, consult the methodology section on page 71.

FIGURE 26
WHAT QUALITIES ARE IMPORTANT IN A MANAGER?

Biggest regional difference by country, Latin America

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Middle East

Do you think that new ways of leading will be needed in the future?

YES, AS GENERATIONS ARE DIFFERENT AND THE COMING GENERATION IS LAZIER AND TECHNOLOGY DEPENDENT. INSPIRING WORDS AND PREVIOUS MOTIVATION TECHNIQUES MIGHT NOT BE ENOUGH.

FEMALE, LEBANON

WE ARE MORE DIFFERENT THAN YOU THINK

The three countries we focused on in the Middle East (the United Arab Emirates, Turkey and Lebanon) have very different economies and political histories; for example, in the United Arab Emirates (UAE) GDP per capita has soared to a level three times that of Turkey and Lebanon. Also, there's a sizeable population of expatriates in the UAE, unlike other countries in the Middle East that participated in our study.

Surprisingly, the differences between these three countries are not as big as one might imagine. Millennials in the region care deeply about innovation (Turkey and the UAE in particular), with a large share (48 percent) saying they would quit their jobs if their employers were not innovative enough. [FIGURE 27](#)

Middle Eastern Millennials are typically less open to accepting stress and hard work to reach leadership positions (46 percent



agree extra stress and work time is worthwhile, compared to the global average of 64 percent). Interestingly, many (particularly in Lebanon and Turkey) agree that it's better to have no job than a job they hate. In the

Middle East 31 percent strongly agree that no job is better than a hated job, versus just 19 percent globally. [FIGURE 28](#)

Regarding who or what has the strongest ability to influence society, the three countries we surveyed are far apart. Some 51 percent of UAE Millennials believe government is most influential, while in Turkey the majority (46 percent) cites private business. In Lebanon Millennials believe individuals have the strongest influence (46 percent mention it). [FIGURE 29](#)

For most Middle Eastern Millennials, work-life balance is defined as having enough time for one's private life (64 percent); however, there are other notable differences in terms of what Millennials value. Acceptance of parental leave is important for 30 percent of Lebanese Millennials,

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Middle East

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Many Millennials claim to fear getting stuck in their career. Do you have this fear?

NO, CHANGING MY CAREER HAS ALLOWED ME TO GAIN MORE KNOWLEDGE AND EXPERIENCE. CHANGING A JOB IS NOT EASY AND IT'S A DAUNTING TASK. HOWEVER, WITH PATIENCE AND RESILIENCE, YOU CAN ALWAYS GET A BETTER OPPORTUNITY.

MALE, UNITED ARAB EMIRATES

while offering external activities is important for 40 percent of Turkish Millennials and 46 percent of UAE Millennials value flexibility around working hours.

Middle Eastern Millennials are particularly afraid of getting stuck in their careers—a fear we found resonated in other regions as well. Turkish Millennials, however, differ from the rest as nearly half (46 percent) fear they will not find a job that matches their personality. Regarding challenging work, some 38 percent of UAE Millennials typically define it as working outside their comfort zone, whereas 37 percent of Lebanese and 31 percent of Turks associate it with having a higher level of responsibility. [FIGURE 30](#)

Finally, the three countries of the Middle East differ in how they would set personal priorities. In the UAE, Millennials were most



likely to desire a successful career (67 percent), though a significant number (42 percent) want to work for the betterment of society. In Turkey, Millennials place the highest value on growing and learning new

things, followed closely by having a successful career. Lebanese Millennials emphasize the same top two priorities as Turks, however, they value career over learning new things. [FIGURE 31](#)

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FIGURE 27
I WOULD QUIT A JOB IF MY EMPLOYER WAS NOT INNOVATIVE ENOUGH

"Agree" and "Strongly agree"
by country, Middle East

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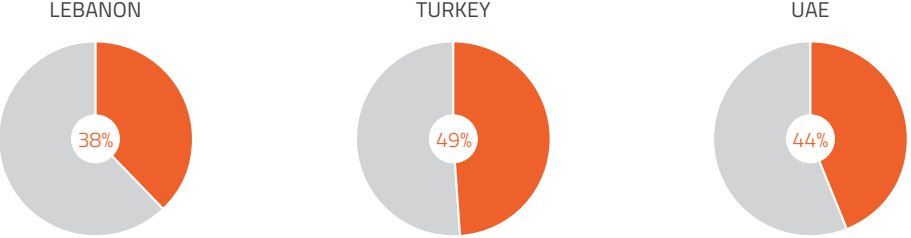
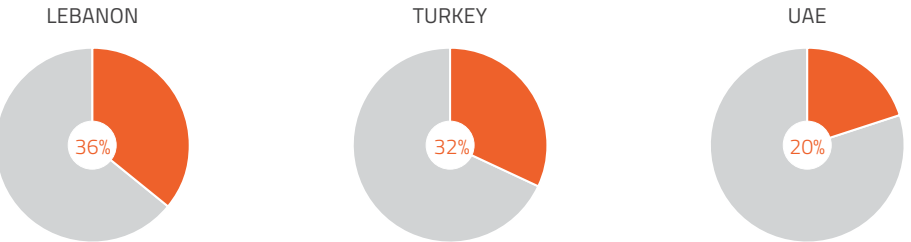


FIGURE 28
I WOULD RATHER HAVE NO JOB THAN A JOB I HATE

"Strongly agree" by country, Middle East

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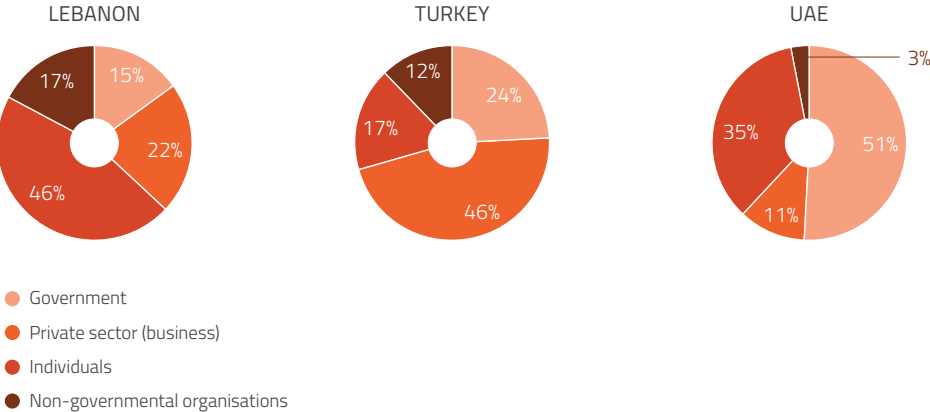
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FIGURE 29
WHO OR WHAT HAS THE STRONGEST INFLUENCE ON SOCIETY?

Top choice by country, Middle East



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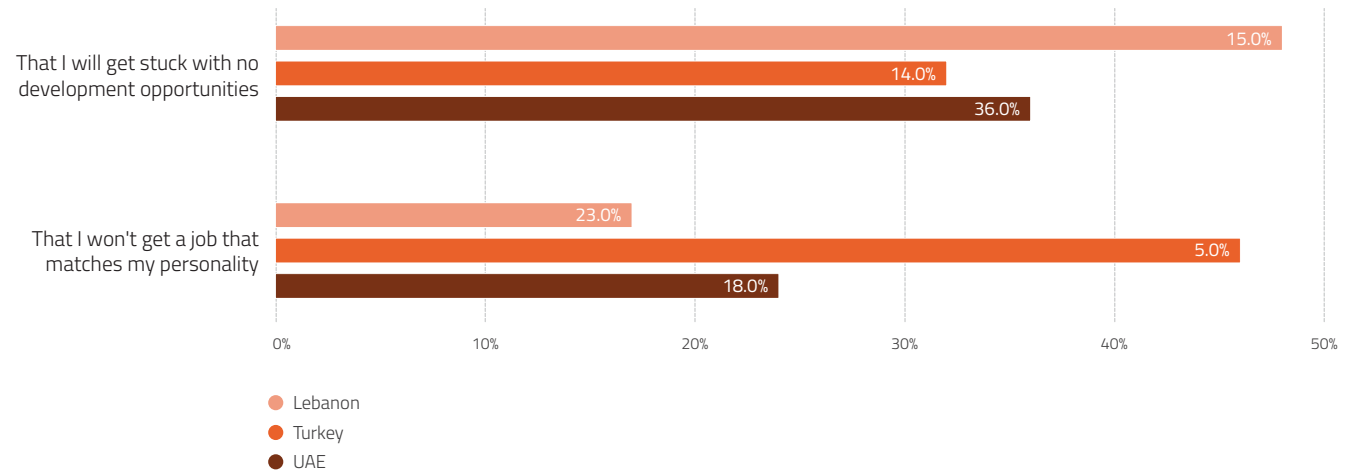
FIGURE 30

WHAT ARE YOUR GREATEST FEARS REGARDING YOUR FUTURE WORK LIFE?

Top 2 choices by country, Middle East



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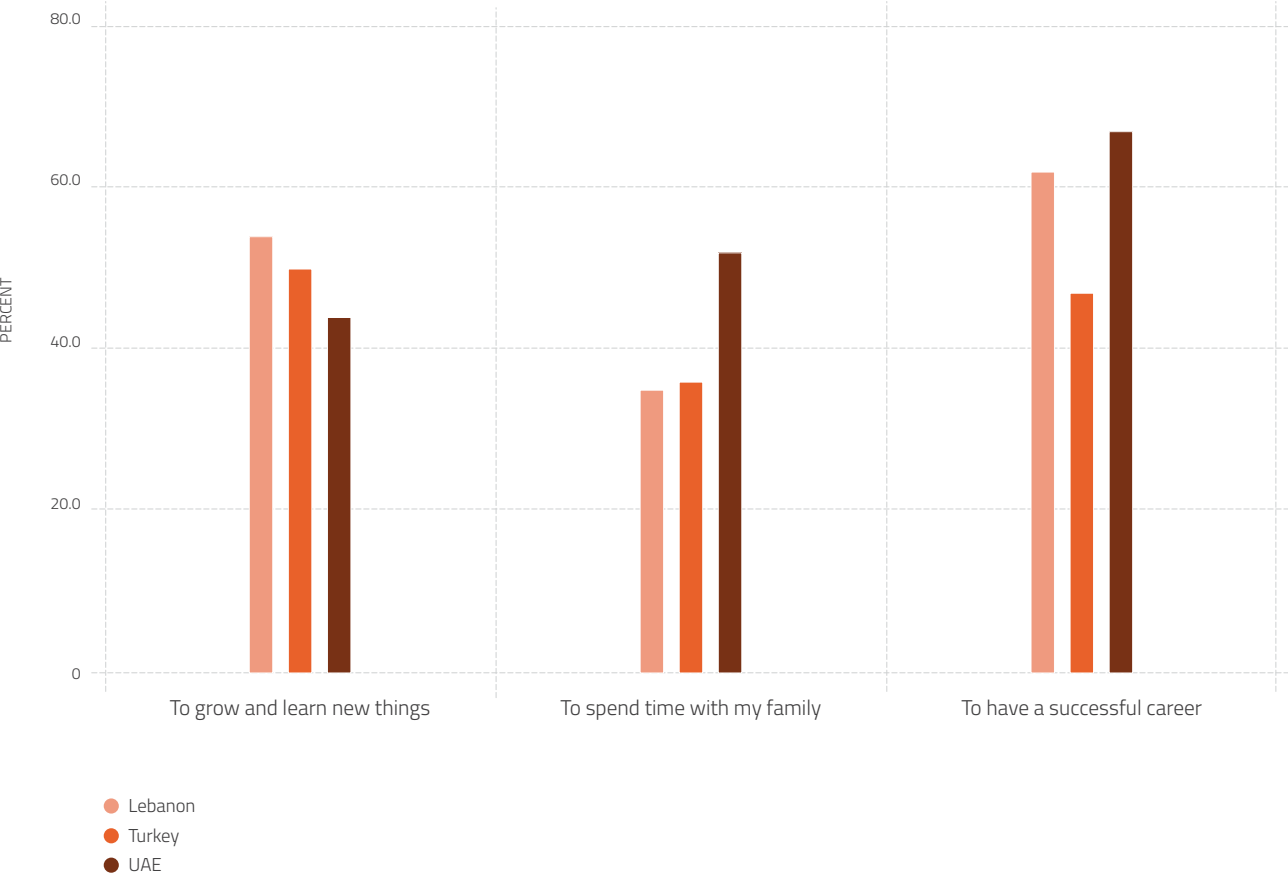
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FIGURE 31
IF YOU COULD PRIORITIZE, WHAT WOULD YOU EMPHASIZE?

Top three by country, Middle East



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North America

What does work-life balance mean to you?

SHUTTING OFF WORK WHEN YOU GET HOME, BEING INVOLVED IN SOCIAL ACTIVITIES WITH FAMILY AND FRIENDS, TAKING TIME FOR YOURSELF... ALL THINGS IN MODERATION.

FEMALE, CANADA

WE ARE MORE DIFFERENT THAN YOU THINK

North America has the highest degree of homogeneity (something expected given the cultural and commercial proximity of the United States to Canada). Millennials in both countries have roughly similar, albeit not identical, attitudes regarding career prospects and influences, among other things.

Unlike Millennials in many other regions, North Americans are less optimistic about achieving a higher standard of living than their parents. Approximately a quarter of respondents strongly agreed their quality of life would exceed that of their parents. [FIGURE 32](#)

We asked Millennials about their greatest fears, and found US Millennials worry more about career issues than their Canadian peers. They are, for example, more afraid of getting stuck in their careers (40 percent versus 30 percent of Canadians) and of working too



much (31 percent versus 24 percent of Canadians). [FIGURE 33](#)

US Millennials are more attuned to whether their employer empowers its employees—48 percent cited it versus 34 percent of Canadians.

Also, US Millennials are much more concerned about issues of diversity; 28 percent say it's very important that their fellow employees and managers come from diverse

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What reasons do you think that people could have for not wanting to work where their friends work?

ONE OF THE BEST WAYS TO MAKE NEW FRIENDS AND STRENGTHEN EXISTING RELATIONSHIPS IS TO COMMIT TO A SHARED ACTIVITY TOGETHER.

MALE, USA



backgrounds, whereas just 14 percent of Canadians feel the same way. [FIGURE 34](#) / [FIGURE 35](#)

On the question of who or what has the strongest ability to influence society, 42 percent of Americans name private business (and they say government has the least influence). Canadian Millennials', however, distribute their opinions more evenly across government (25 percent), private business (29 percent) and individuals (39 percent). [FIGURE 36](#)

Work-life balance is an important topic everywhere but particularly in North America, where respondents had stronger opinions. Millennials in both the US and Canada largely agree it's essential to have enough leisure time (73 percent cite it), but flexibility is also an appealing option for more than half.

Considering that they view work-life balance so favorably, U.S. and Canadian Millennials are surprisingly open to the concept of putting in long working hours to speed up their careers—42 percent agree with the idea. [FIGURE 37](#) / [FIGURE 38](#)

Other points of difference? Forty-four percent of Americans agree they are entrepreneurial, compared to 34 percent of Canadians. And Millennials from both countries (around 60 percent) agree on the importance of family, but Canadians seem to take their hobbies more seriously (37 percent) and US Millennials are more eager to work for the betterment of society (34 percent) and to be learning new things (53 percent).

[FIGURE 39](#) / [FIGURE 40](#)

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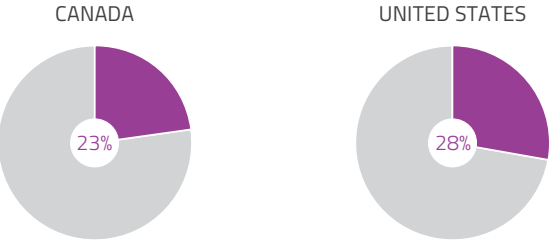
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FIGURE 32
**I WILL ENJOY A HIGHER STANDARD
OF LIVING THAN MY PARENTS DID.**
“Strongly agree” by country, North America

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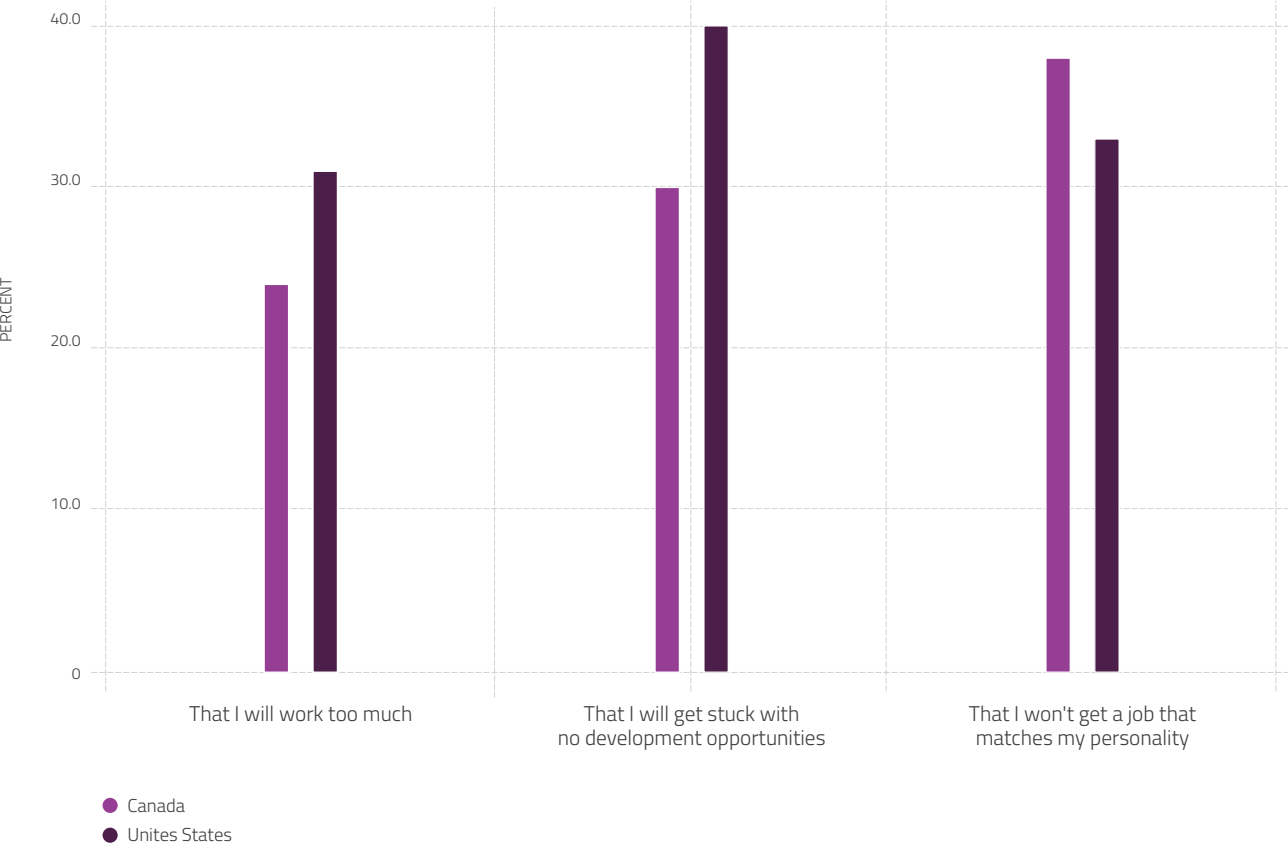
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FIGURE 33
WHAT ARE YOUR GREATEST FEARS REGARDING YOUR FUTURE WORK LIFE?

By country, North America



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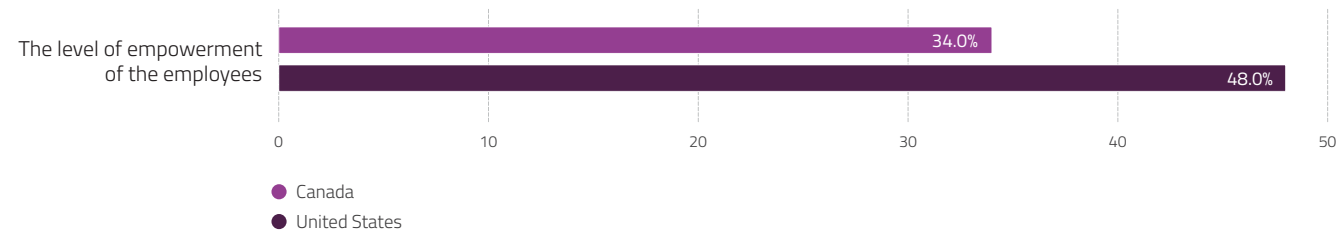
FIGURE 34

**HOW SHOULD MY EMPLOYER'S
CULTURE MATCH MY PERSONALITY?**

"The level of empowerment of the employees"
by country, North America



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FIGURE 35
**HOW IMPORTANT IS IT THAT FELLOW
EMPLOYEES AND MANAGERS COME FROM
DIVERSE BACKGROUNDS?**

“Very important” by country, North America

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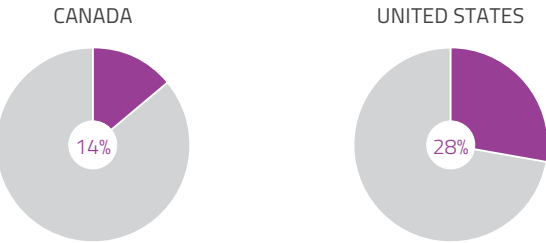
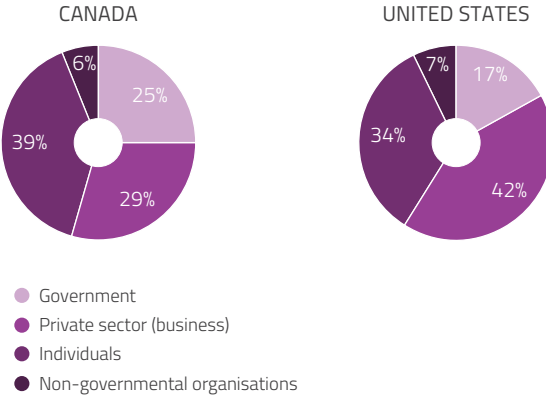


FIGURE 36
**WHO OR WHAT HAS THE STRONGEST
INFLUENCE ON SOCIETY?**

Top choice by country, North America

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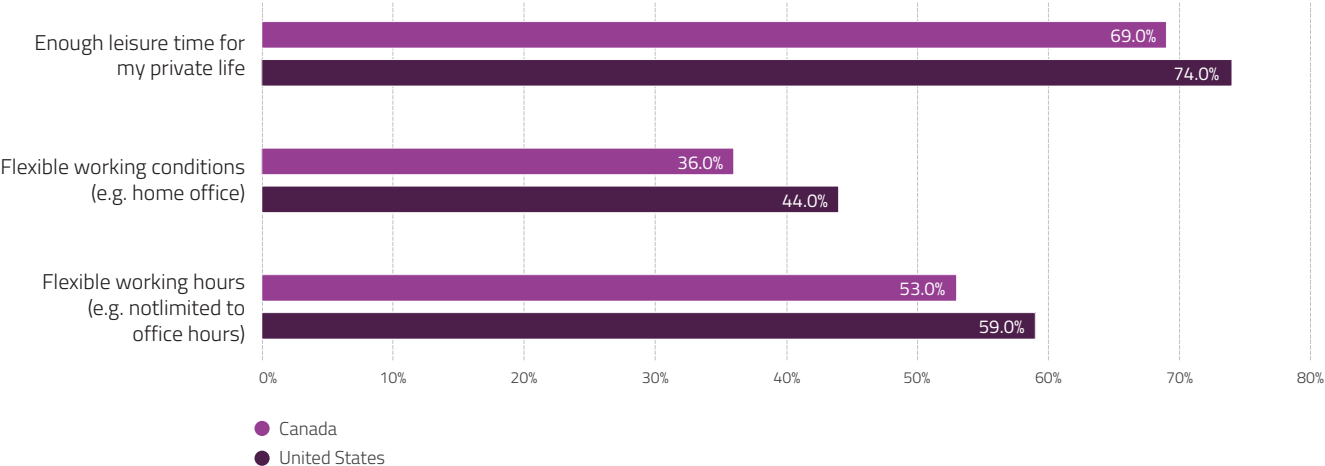
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FIGURE 37
WHAT DOES WORK-LIFE BALANCE
MEAN TO YOU?

By country, North America



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FIGURE 38
WHAT'S YOUR VIEW ON LONG WORK DAYS TO SPEED UP CAREER PROGRESS?

"Interested" and "very interested"
by country, North America

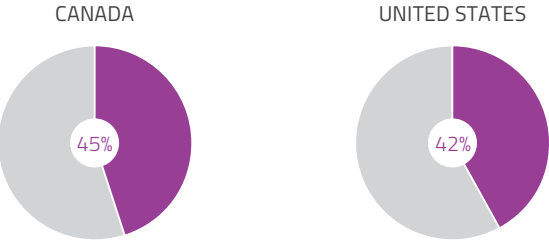
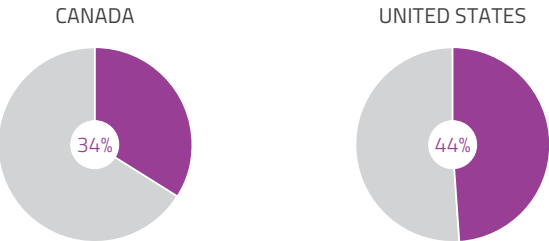


FIGURE 39
I AM AN ENTREPRENEURIAL PERSON

"Agree" and "Strongly agree"
by country, North America



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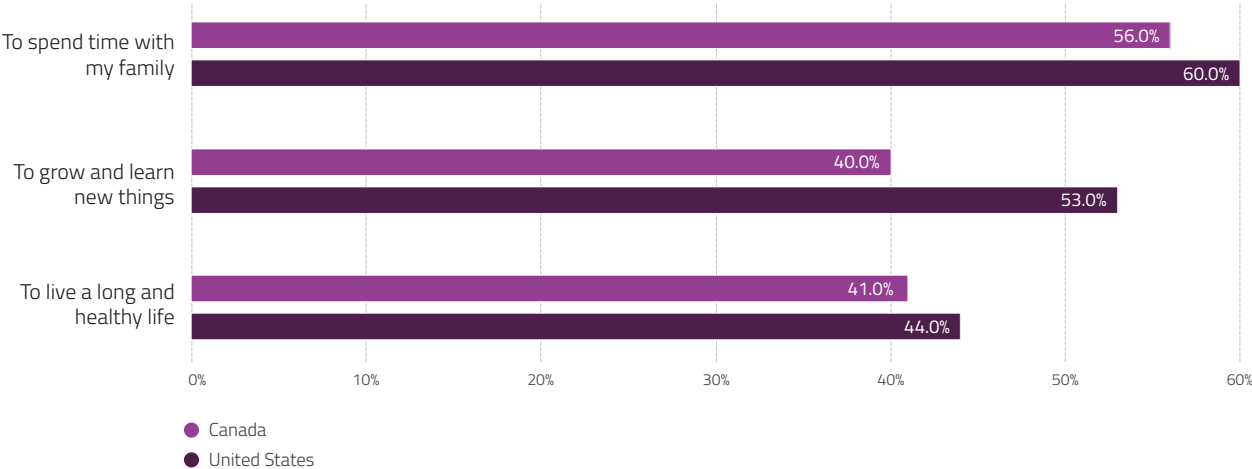
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FIGURE 40
IF YOU COULD PRIORITIZE YOUR LIFE, WHAT WOULD YOU EMPHASIZE?

Top 3 choices by country, North America

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With regards to your future career,
how important is empowerment to you?

IT REPRESENTS THE TRUST THAT YOU
GIVE AND RECEIVE BY EMPLOYERS.

MALE, ITALY

WE ARE MORE DIFFERENT THAN YOU THINK

With fourteen countries represented under the heading of Western Europe, it is fair to say most of the region is covered in the study. And because it's so thorough, our research on Western Europe also shows greater diversity of opinions. The countries around the Mediterranean obviously share a common heritage, and so display preferences and priorities quite apart from the Scandinavian countries, Germany and Austria.

Overall, Western Europe is more similar to North America in attitudes than any other region. On many issues, such as the need for flexibility and the importance of work-life balance, these two regions move more or less in lockstep.

We noted several clusters of agreement among the countries. On many questions, countries like Spain and Italy share a great deal of common ground. For example,



they both attach importance to titles and are not as optimistic about having a better standard of living as their parents. (Only 13-14 percent “strongly agree” they will be better off than their parents in Spain and Italy, compared to a 20 percent regional average.) [FIGURE 41](#)

Germany and Austria also show similar preferences. Millennials in both countries care about empowerment at work (56 percent of Austrians and 57 percent of Germans cite it as an important aspect of an employer’s culture); and they view private business as having the strongest ability to influence society (over that of individuals or government). [FIGURE 42](#)

Sweden and Norway (and to some extent the other Nordic countries) together make up another cluster. They are not very interested in

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Do you think it is possible to have autonomy and yet fulfil the social expectations around you?

I BELIEVE IT'S MUCH EASIER TO DO SO WITH AUTONOMY BECAUSE YOU CAN COORDINATE ALL YOUR PLANS AND APPOINTMENTS BY PRIORITIZING AND IT FACILITATES PLANNING.

MALE, GERMANY



leadership roles (at least not compared to places like France, where 50 percent say attaining a leadership position is very important compared to only 15 and 20 percent of Norwegians and Swedes, respectively). They also report similar attitudes about issues like ideal qualities for a manager, and the definition of work-life balance (which they associate much more with parental leave). However, Finns are much more likely to fear ending up with a job that does not match their personality (59 percent cite it); whereas the Norwegians seem much less concerned (only 18 percent cited the same).

[FIGURE 43](#)

In addition to these topics around which many of the countries tend to cluster, there are also many others on which Western European Millennials speak with more or less one voice. For example, friends are very important, but not as

influencers on career issues. On the one hand, Western Europe has the highest share of Millennials saying they would rather listen to the opinions of friends than those of their managers or peers (according to 48 percent in the region compared to 36 percent globally). On the other hand, they are not eager to work where their friends work (as 59 percent disagree compared to 39 percent globally).

[FIGURE 44](#)

As for their preference for work-life balance, it means a great deal to them, but not to the extent that they would rather go without a job than have a job they hate. In fact, they are slightly more inclined to do a job they dislike (40 percent disagree with the statement of “I’d rather have no job than a job I hate”). In all likelihood, this is due to many of these countries (notably Spain and Italy) experiencing record youth unemployment. [FIGURE 45](#)

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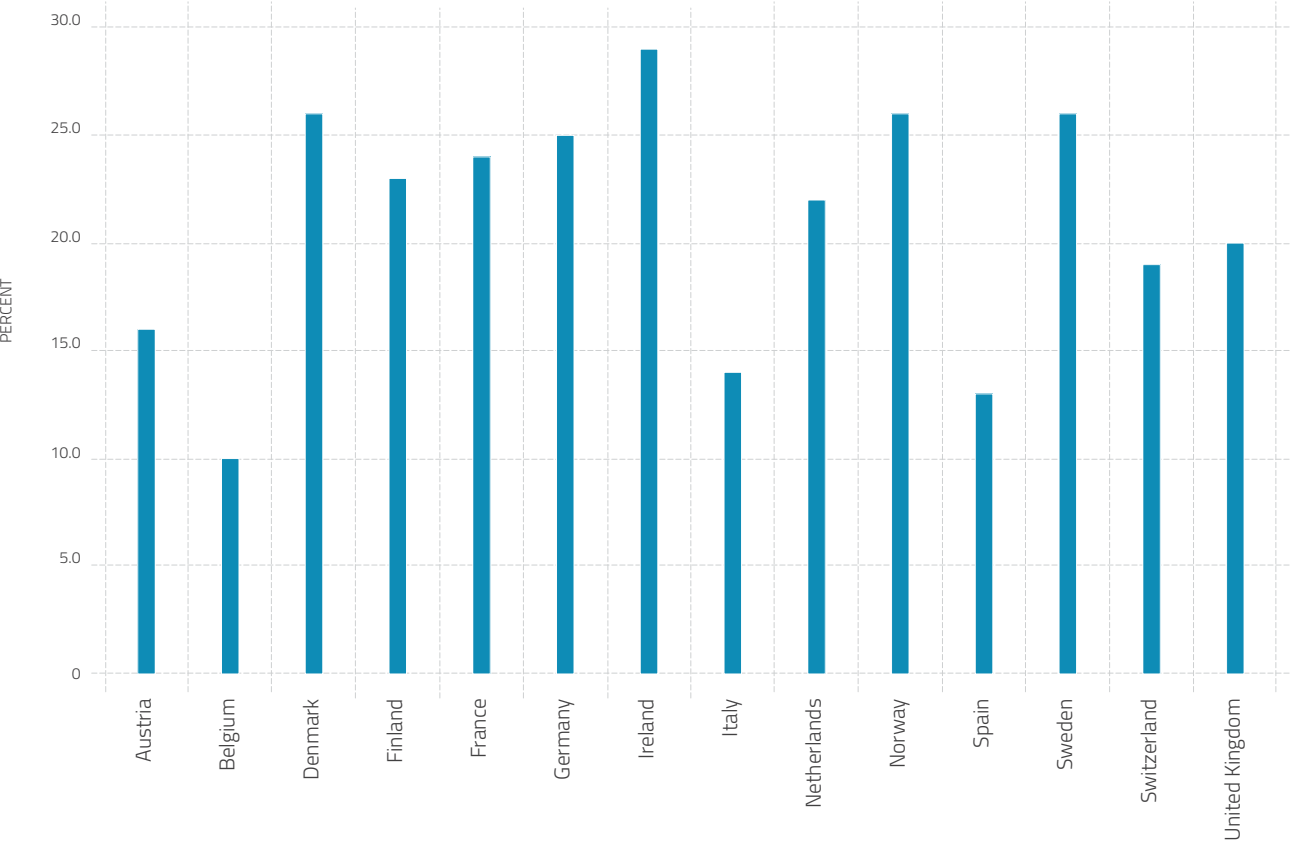
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FIGURE 41
I WILL ENJOY A HIGHER STANDARD OF LIVING THAN MY PARENTS DID
“Strongly agree” by country, Western Europe

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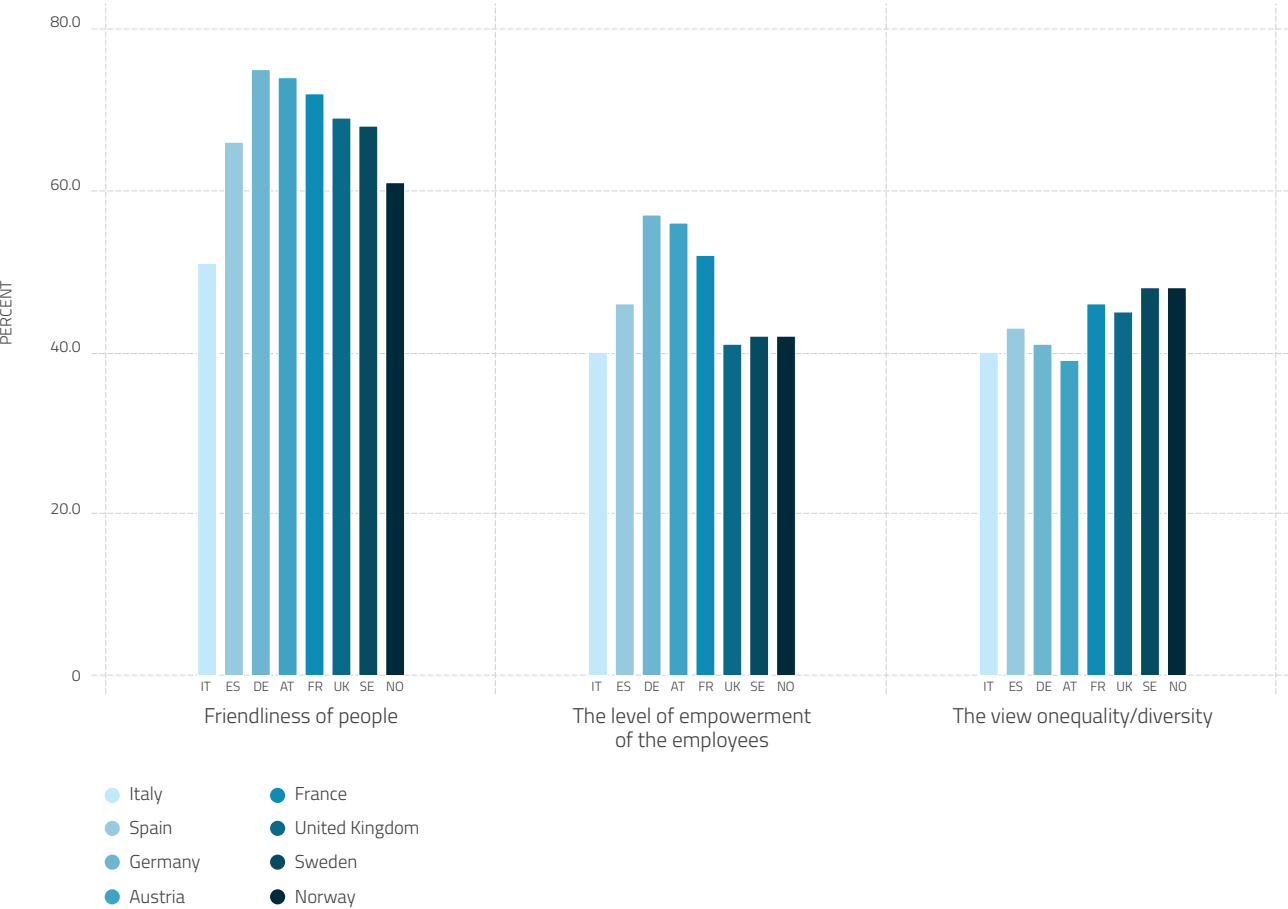
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FIGURE 42
WHAT ASPECTS OF EMPLOYEE CULTURE SHOULD MATCH YOUR PERSONALITY?

Top 5 by country, Western Europe



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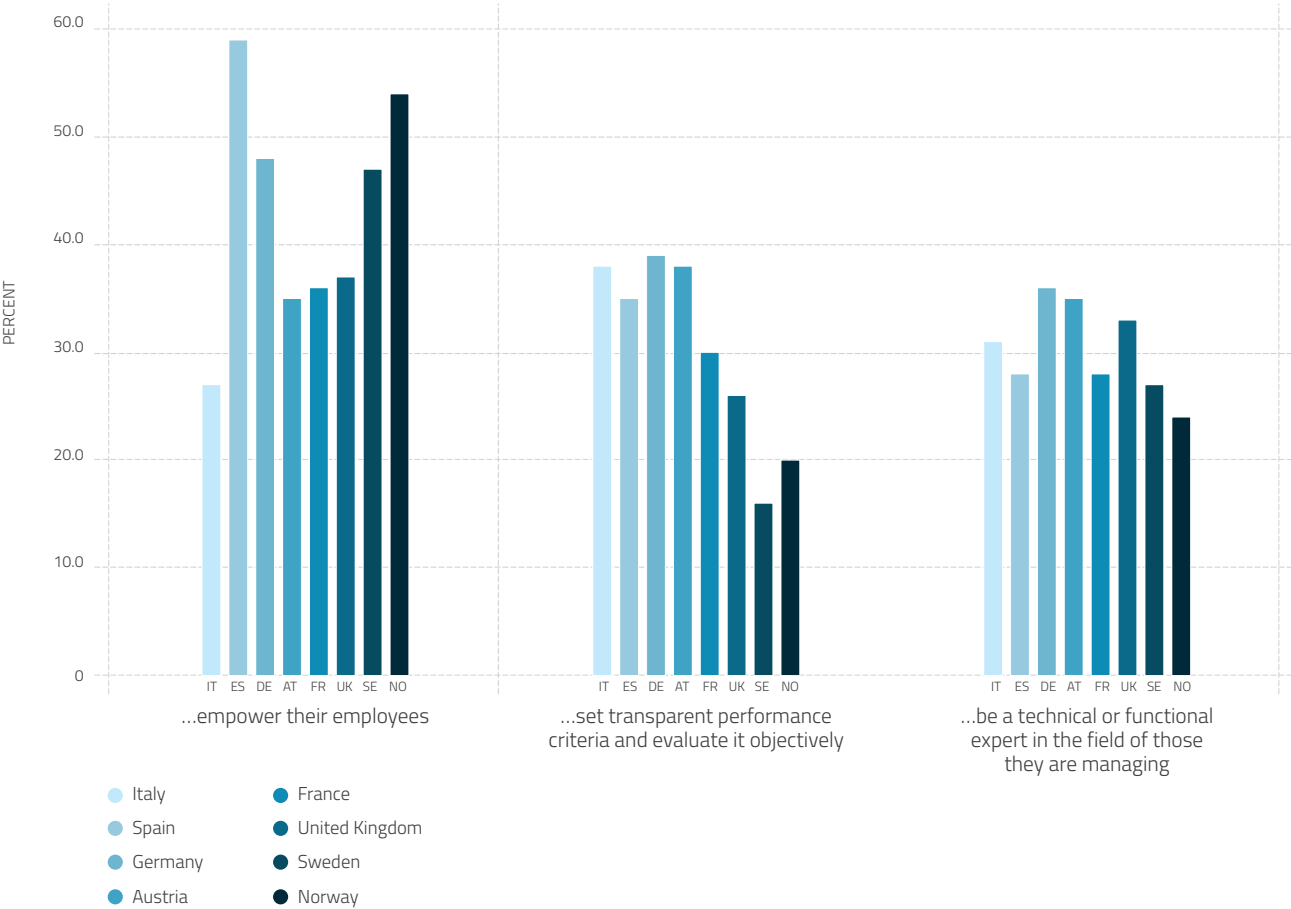
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FIGURE 43
WHAT QUALITIES IN A MANAGER ARE IMPORTANT TO YOU?

Top 3 by country, Western Europe



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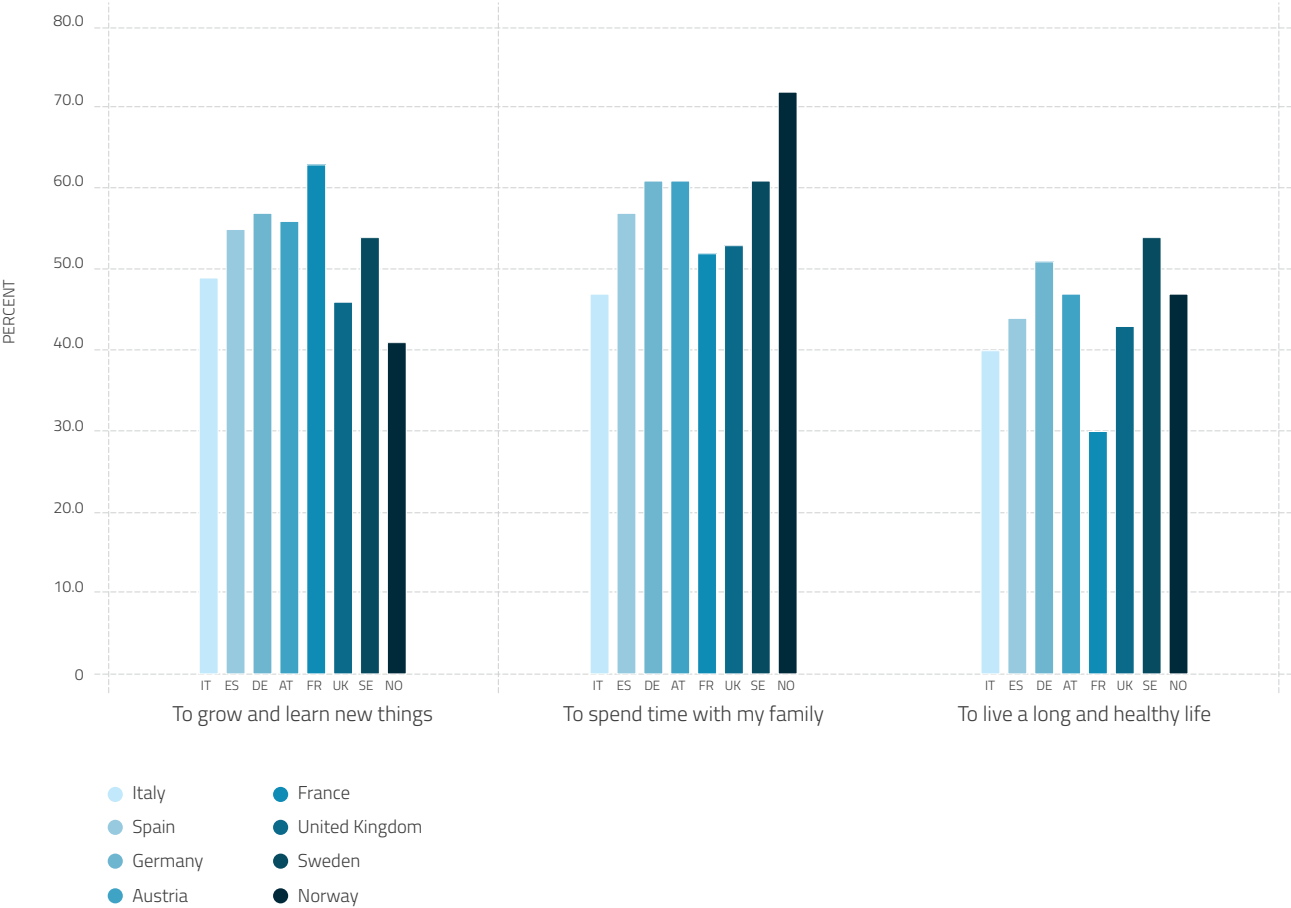
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FIGURE 44
IF YOU COULD PRIORITIZE, WHAT WOULD YOU EMPHASIZE IN LIFE?

Top 3 by country, Western Europe

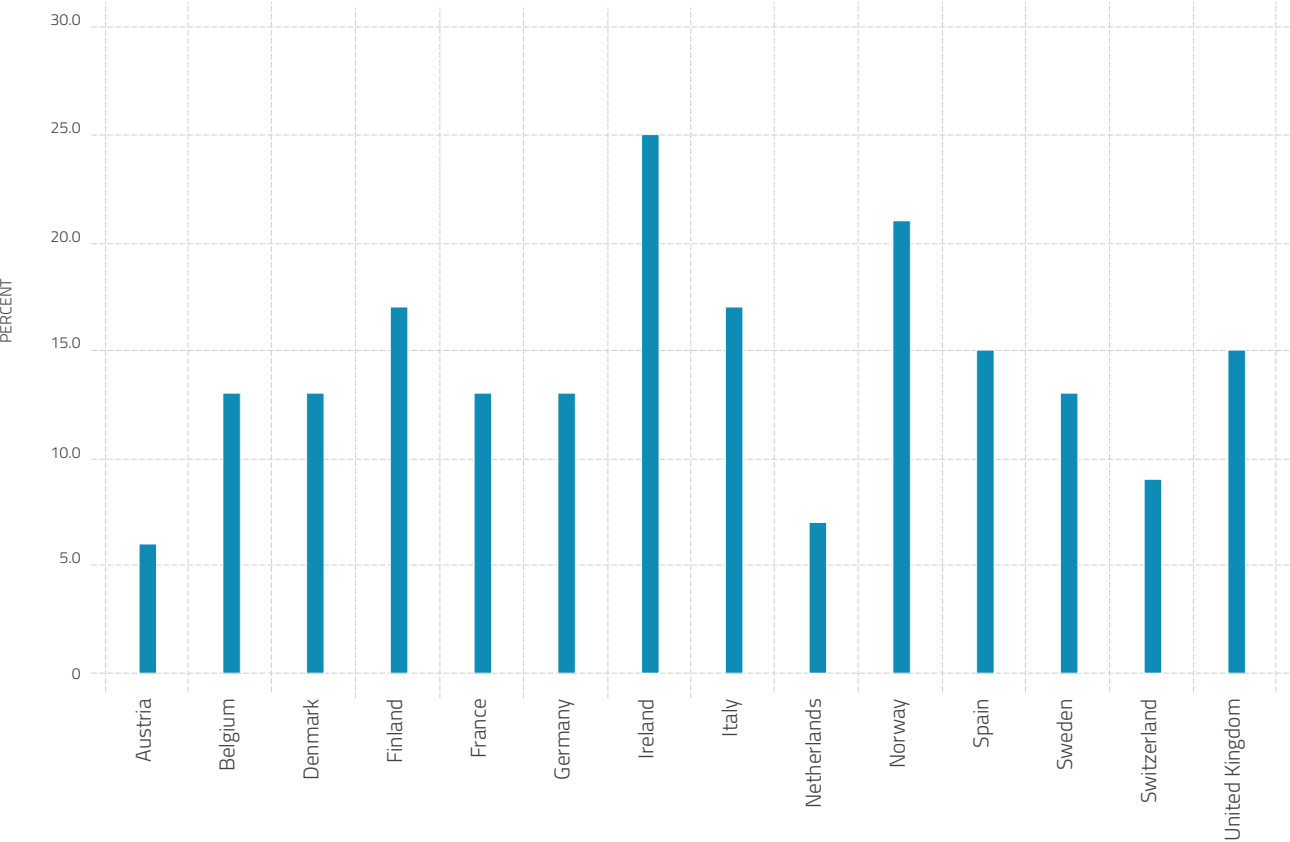


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FIGURE 45
**I'D RATHER HAVE NO JOB
THAN A JOB I HATE.**

"Strongly disagree" by country,
Western Europe



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The Twins Analysis

HOW DO MILLENNIALS FROM DIFFERENT PARTS OF THE WORLD RESEMBLE EACH OTHER IN ATTITUDE AND GOALS?

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So far we have compared Millennials' responses to individual survey questions across different geographies. But are there patterns amidst all the findings—personas that can help identify specific career types? Are there countries that resemble “twins” in terms of how Millennials think about their careers?

In order to answer those questions, we performed a cluster analysis of the survey responses to certain key questions:

- The likelihood they will enjoy a higher standard of living than their parents
- The importance of titles as a form of recognition
- The importance of becoming a manager over the course of one's career
- The importance of receiving feedback on work performance from, respectively, one's manager and one's peers
- Their attitudes about diversity in the workplace
- The influence on career decisions of, respectively, one's parents and one's friends
- The likelihood of giving up a high-paying, prestigious job in exchange for improved work–life balance
- Which of 13 pre-stated aspects best match their definition of work–life balance
- Which three of 13 pre-stated fears about their career resonate most
- Which three of eight pre-stated career priorities they emphasize most

The cluster analysis uncovered four main groupings of students. We also uncovered correspondences between countries that, geographically, are quite distant from each other.


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THE FOUR GROUPS STUDENTS FELL INTO WERE:

1. Strivers and climbers.

These Millennials seek traditional management-track corporate careers. They see work as a path to personal growth and self-fulfillment and are attracted to “work hard, play hard” corporate cultures where they’ll be able to socialize with similarly ambitious and intellectually curious peers. Their greatest career-related fear is getting stuck on the corporate advancement ladder.

This is the most common profile for respondents in all fields of study globally, except humanities, for whom it is slightly less common than the “work–life balancers” (see below). Overall, 33 percent of respondents fall into this group. This profile is particularly prominent in Latin America, with the majority of students in several Latin countries falling into this group.



Other countries with higher-than-average proportions of respondents in this group include Italy, Russia, South Africa, Turkey, Lebanon, and Singapore.

2. Work–life balancers.

These Millennials place a high priority on work-life balance, and

are unwilling to trade their leisure time or physical well-being for career acceleration. They tend to be younger, and are not concerned about being victims of age discrimination. They believe the right job should match their personality

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type. They are skeptical about their ability to achieve the same standard of living enjoyed by their parents. Respondents from many different fields of study fall into this group, but it is particularly prominent among those who studied the humanities and the natural sciences.

The majority of respondents in northern Europe and the German-speaking countries fall into this group. It is the most common group in other Western European countries (France, Spain, and the United Kingdom), the United States, and Canada. However, this is not

strictly a “rich north” grouping — higher-than-average proportions of respondents in Indonesia and Vietnam also fall into this group. Globally, this is the second most-common group, with about 25 percent of respondents falling into this category.

3. Technical experts who are cautious about fit.

These Millennials are attuned to corporate prestige and the social cues around it — indeed, they are the most likely to be influenced in their career choices by family and friends. While they place a high priority on having a successful career, they see that success as a means to an end, rather than an end in itself.

They want to find jobs where there will be a personal fit between them and the culture, and are concerned

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about working too much and being unable to separate their work and personal lives. While they are optimistic about corporations being open to diversity, they are concerned that they may be discriminated against due to their sex and/or ethnicity. They are most likely to have studied engineering, IT, or management.

The majority of respondents in India and Nigeria fall into this group. Other countries where this profile is highly prominent include Lebanon, the United Arab Emirates, Indonesia, the Philippines, and China. Globally, this group is slightly smaller than the “work–life balancers,” with 24 percent of total respondents.

4. Socially ambitious, but pessimistic about corporate life.

These Millennials are ambitious and hard-working, and want to become wealthy and socially prominent, but don’t necessarily

see corporate careers as leading to success. They were the least likely to say that becoming a manager is important to them, and they did not assign a great deal of importance to recognition in the form of titles. They are most afraid that they won’t realize their career goals and won’t be taken seriously by the organization that employs them. Many of them are also concerned about being discriminated against due to their gender, sexual orientation, or age. They are pessimistic about their long-term economic prospects, with the majority believing they will not achieve the standard of living enjoyed by their parents.

This group was most common in countries that have faced a high degree of political unrest over the past ten years, and/or where a once-booming economy that has collapsed or stagnated. It was the most common group in Japan,

where 72 percent of respondents fall into this category. Other nations with a heavy tendency towards this group include Australia, Hong Kong, Thailand, Argentina, Chile, Ireland, Poland, and Russia. Globally, this was the smallest group, with only 18 percent of respondents.

Naturally, no country’s respondents came from a single group — we found a diversity of perspectives in every country studied. The countries with the most extreme concentrations of students in a single profile were Japan, India, and Austria. Conversely, the countries that came closest to mirroring the global average, in terms of how respondents were spread across groups, were Malaysia and China.


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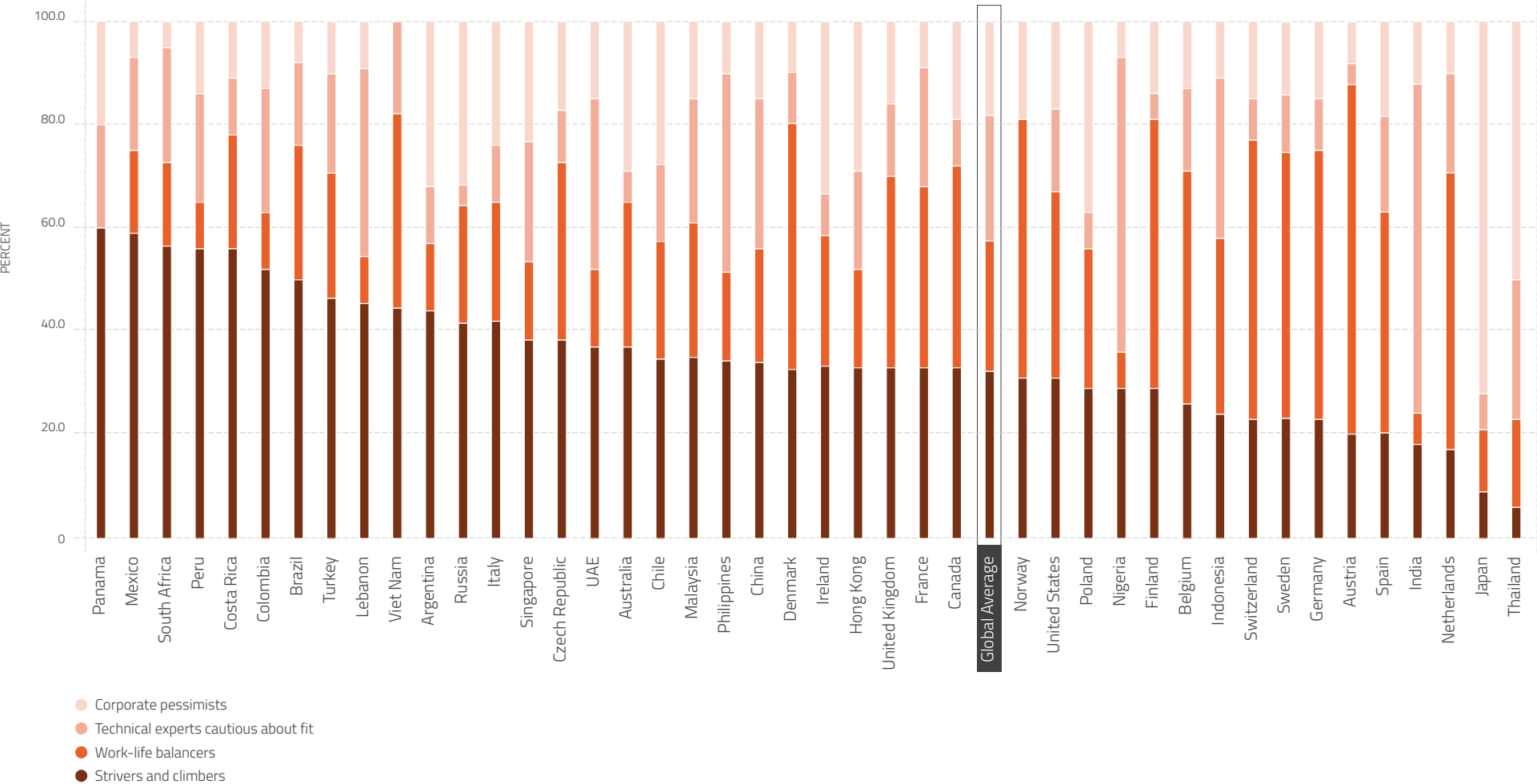
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In this chapter, we set out to investigate the extent to which Millennials across the world share the same opinions, preferences and aspirations. While it may be convenient to discuss Millennials and their characteristics on a regional level, the survey results strongly suggest that the country level is the most relevant one.

Of course, not all regions are as disparate as APAC. In North America or Latin America, for example, there are certainly differences between individual countries, but not as pronounced as elsewhere. Moreover, it seems that many regions also have outliers (e.g. Russia, Japan and Belgium) that differ extensively on several counts compared to their respective regions.

Although we would caution organizations to base their talent strategies at the country level, it is possible to create clusters of countries, even within the regions, where a single talent communication strategy could apply. The best examples come from

Western Europe, where countries like Sweden and Norway, Germany and Austria, Spain and Italy, tend to have Millennials with similar views and preferences than the larger grouping labelled Western Europe.

The reason why a country-level approach isn't recommended is because it's harder to create one consistent voice and build one global brand image (e.g. if there are widely disparate communication and branding strategies occurring). Nevertheless, employers can still apply regional or cluster-thinking to direct how their business should be organized, and in doing so facilitate greater consistency in communications overall.

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METHODOLOGY

Data for this study was collected mainly through Universum’s proprietary Millennial database, as well as through external panel providers in selected geographic areas. Covering 43 countries, we surveyed 16,637 people between the ages of 18-30 during May to August 2014. All the regional and global data in this report have been weighted by the share of the population in each country with access to the internet. *As with all surveys not based solely on probability sampling, error estimates cannot be calculated.*

Region/country	Sample size
Asia-Pacific (APAC)	
Australia	255
China	1,142
Hong Kong	142
India	1,084
Indonesia	295
Japan	202
Malaysia	279
Philippines	1,252
Singapore	130
Thailand	188
Vietnam	97
Africa	
Nigeria	128
South Africa	468
Central and Eastern Europe (CEE)	
Czech Republic	69
Poland	244
Russia	321

Region/country	Sample size
Latin America (LATAM)	
Argentina	110
Brazil	1,036
Chile	825
Colombia	308
Costa Rica	226
Mexico	1,026
Panama	127
Peru	193
Middle East (ME)	
Lebanon	54
Turkey	180
United Arab Emirates	89
North America (NA)	
United States	1,045
Canada	333

Region/country	Sample size
Western Europe (WE)	
Austria	142
Belgium	68
Denmark	304
Finland	212
France	440
Germany	550
Ireland	248
Italy	667
Netherlands	280
Norway	186
Spain	451
Sweden	310
Switzerland	236
United Kingdom	695

TOTAL	16,637
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