

Hispanic Millennials and Mobile Ethnographic Research Results

Released November 2014

Pacific Ethnography



Summary of Findings: Qualitative

Making Connections

- Most Millennials we spoke with are online “all the time,” regardless of their—or their family’s—national origin. Being offline, for most, feels uncomfortable; being without their smartphone feels “naked.”
- Unlimited data is the most important aspect of a service plan, with phone calls being seen as an annoyance. For the Hispanic Millennials we spoke with, the exception most often involves calls from their mom.
- Hispanic Millennials control their constant mobile access in layers: close family and friends are given access to all primary modes of connection (primary email, text, social networks, and some phone calls), while acquaintances are given more restricted layers of access (only email and social networks). Unwelcome brands get secondary or “junk” email account access.
- Millennials of all kinds who use smartphones view texting as more intimate, and emails as more formal and less intimate.

Summary of Findings: Qualitative

Family Affair

- Moms and older siblings are important influencers (or purchasers) of a Millennial's first phone.
- Millennials with children provide smartphone access—with limits—to their children.

Ads and Mobile

- Hispanic Millennials often **welcome ads, as long as they are ads they opt-in to or choose**. They also welcome emails from companies they **choose to opt-in to**, and see these emails as real communication and not junk mail or spam.

Summary of Findings: Qualitative

Ads and Mobile

- Ads in general can be welcome if the ad:
 - Is about something wanted for a purchase.
 - Is about a celebrity of interest.
 - Represents a specific style preference.
 - Is cute or sentimental.
 - Represents American ethnic diversity.
 - Is an ambiguous ad that creates curiosity and buzz.
- Don't assume that just because an ad is in Spanish that it will be good enough for this audience. This is a complicated issue with many subgroups when it comes to culture and language, and we must be sensitive to that when creating ads.

Summary of Findings: Qualitative

Devices, Plans, and Budgets

- Sometimes smartphone technology is rejected because of a high value placed on real-time contact with family, or a worry that too much time on social networking sites can become a “vice.” Among these Millennials, the flip phone, many times shared among friends and family, may still be the technology of choice.
- Hispanic Millennials we met have owned up to five mobile devices, and value devices that are “indestructible” or devices to which they feel an emotional connection (i.e. their very first mobile device, a device they had during a difficult time in their life, etc.). Old devices are saved, passed on, or both. They can also be sold to fund the purchase of new devices.

Emotions

- Old phones are rarely thrown away; they are physical reminders of and containers for emotional connection to past events and people.
- Phones can represent, remind, and contain a full range of emotions, from sadness to delight. In this way, mobile technology has a social life.

Summary of Findings: Quantitative

A quantitative survey was administered after the qualitative research was analyzed; results from the qualitative work allowed relevant questions to be asked during the quantitative survey. The quantitative results revealed several patterns:

- Overall, smartphone usage and behaviors do not differ drastically between Hispanic Millennials and Non-Hispanic Millennials. Instead, the data shows that Millennials act somewhat similarly.
- That being said, one directional difference in usage shows that Hispanic Millennials are less inclined to use texting as their most common method of communication to family and friends. Instead, a wide variety of methods are used -- particularly Facebook (and other social media messaging) when it comes to friends.
- Hispanic Millennials self-report having slightly less of an emotional connection to their phones than Non-Hispanic Millennials.

Summary of Findings: Quantitative

Survey results indicate there are opportunities for reaching Hispanic Millennials through mobile advertising:

- Hispanic Millennials are somewhat more likely to be influenced by advertising when making a mobile carrier decision.
- Hispanic Millennials are more open to receiving emails from brands on their phone.
- Hispanic Millennials are more willing to follow a brand on social media after seeing an advertisement on their mobile.

Goals and Methods

Devices, Plans, & Budgets

Making Connections

Ads and Mobile

Family Affair

Emotions

Appendix: Quantitative Data

About Pacific Ethnography

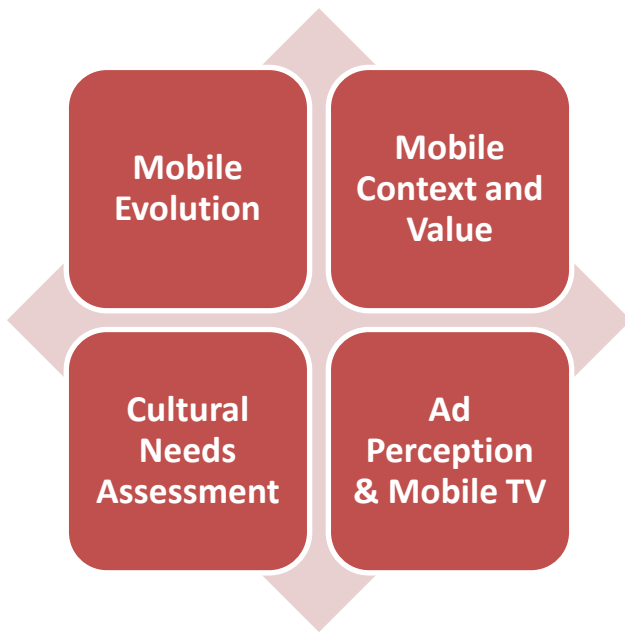
Goals

This research report is the culmination of research goals set forth by IAB's Mobile Marketing Center of Excellence (IAB Mobile Center), in partnership with Univision. The overarching goal for the project was to understand the role that mobile, and in particular smartphone ownership, plays in the lives of Hispanic Millennials in the United States. Sample business questions included:

- Which aspects of mobile connectivity do this audience segment find most valuable?
- Does this audience segment think of mobile as a “medium” at all?
- What are the cultural touch-points that make mobile so valuable to Hispanic Millennials?
- How does the role of mobile in the lives of this segment vary from context-to-context or moment-to-moment through the day?
- How does this segment perceive mobile advertising in the course of their daily mobile lives?

Goals

The research initiative was broken down into four broad categories of discovery among Hispanic Millennials:



The project employed qualitative research methods and ethnography to discover actionable insights and meaningful depth surrounding the objects, and used quantitative methods to test hypotheses and qualitative results.

Methods: Overview

The project included both ethnographic (qualitative) and quantitative methods, used in accordance with the scientific method to ensure that research results are reliable and valid. This included incorporating multiple ethnographic data collection activities to triangulate data, and quantitative work to test key findings.

Observational Hangouts

- Observing behaviors in a variety of contexts to cast a wide net.

Ethnographic Participant Observation

- Learn the “whys” behind behaviors.

Semi-structured In-depth Interviews

- Delve into needs, perceptions, and motivators.

Collaborative Design Evaluation Groups

- Discovery on innovation and peer motivation.

Fine-tuning and Refining

- Investigating structure and symbolism to give depth to meaning.

Mobile Survey

- Testing qualitative results, and further exploration of identified topic areas.

Methods: Sampling

The fieldwork took place in four locations:

Los Angeles, CA; Tampa, FL; Fort Morgan, CO; Columbia, SC.

All photos in this presentation are images of respondents and not stock photos.

Qualitative Research: n = 62

- “On-the-Street” Millennial Respondents: n = 20
 - Observations and quick intercepts
 - Mix of males and female
- Design Collaboration Groups: n = 16
 - 50/50 split between males and females
 - Aged 18 to 30
- Main Respondents: n = 26
 - 50/50 split between males and females
 - Aged 18 to 30
 - Hispanic, English Dominant: n = 12
 - Hispanic, Spanish Dominant: n = 10
 - Non-Hispanic: n = 4 (n = 2 each city)

Quantitative Research: n = 400

- Split between males and females: 50%
- Split between Non-Hispanics and English Dominant Hispanics.



Quantitative Survey Goals

As an adjunct to the qualitative work conducted by the research team, a quantitative survey was designed using the qualitative results to format questions relevant to the population of interest. The goal of the quantitative survey was to:

- Enhance understanding of the role that mobile plays in the lives of Hispanic Millennials.
- Reveal the contexts of mobile use and patterns (how does social/cultural context make a difference?).
- Explore how mobile advertising is understood, experienced, and valued.
- Uncover implications (if any) that acculturation, generational influences, or length of device ownership has on mobile purchasing/use.
- Identify whether having a smartphone is primarily about communication or media, voice or data, or about pulling in content/connecting to the wider world.

Methodology and Sampling

Method	<ul style="list-style-type: none">• Invitation to complete an online survey via their personal smartphone
Respondents	<ul style="list-style-type: none">• Aged 18 to 30 years old• 50% male, 50% female• Living in the metropolitan areas of Los Angeles (CA), greater Tampa (FL)• Quotas set for Hispanics (Spanish Dominant), Hispanic (English Dominant) and Non-Hispanic
Timing	<ul style="list-style-type: none">• May 9th – 22nd, 2014
Sample Size	<ul style="list-style-type: none">• n = 400

Methodology and Sampling

Key Definitions

Hispanic: Spanish Preferred (Spanish Dominant)

Those who selected Spanish for the language of interview (at Q.1) and described themselves as being Hispanic or 'It Varies' (at Q.4)

Hispanic: English Preferred (English Dominant)

Those who selected English for the language of interview (at Q.1) and described themselves as being Hispanic or 'It Varies' (at Q.4)

Non-Hispanic

Those who selected English or Spanish for the language of interview (at Q.1) and described themselves as being Non-Hispanic (at Q.4)

Goals and Methods

Devices, Plans, & Budgets

Making Connections

Ads and Mobile

Family Affair

Emotions

Appendix: Quantitative Data

About Pacific Ethnography

Replaced and Improved

The smartphone has replaced a plethora of services and gadgets. It would be difficult to name something that the smartphone *hasn't* replaced. Here are things smartphones have replaced, as stated by study respondents:

Camera	Video recorder	iPod/mp3 player	Voice recorder	Alarm clock
Computer	TV remote	Bank	Notebook	Calendar
To-do list	Flashlight	Babysitter	Family planner	Budgeter
	Wallet	Yellow Pages	Maps	

Devices



It should be no surprise that Hispanic Millennials own a variety of mobile devices, from smartphones to tablets to mp3 players. This includes bilingual and mono-lingual English speaking Hispanic Millennials.

In fact, the respondents we talked to have owned an average of five different mobile phones.

But how and why do they...

- Get them
- Trade up
- Keep them

Getting Them

A Millennial's first device can come from a few different sources: It can be gifted to them new by a parent, they can save to purchase it themselves, or it can be a hand-me-down from a family member or good friend.

- If a mobile device is a gift, it may or may not be a smartphone, but it likely will be that or a tablet. A flip phone is not considered a “gift-worthy” item unless the Millennial is very young.
- If an Hispanic Millennial saves money for a phone, it will definitely be a smartphone. Smartphones are purchased through the carrier, but also through outlets like eBay, Craigslist, Amazon, Walmart, and Best Buy if a phone is not subsidized by the carrier or not available as an upgrade.
- If a phone is a hand-me down, it will often be a flip-phone, but this trend will change with time as flip-phones become less and less popular, and harder to come by. Tablets are not currently hand-me-down items.

“People are attached to the free phone deal, but I have to pay \$600 when I buy a phone.”

Feature Lust

Many respondents suffer from “**feature lust**,” (Pacific Ethnography term) wherein they simply want a phone with the newest capabilities, even if they don’t use the features that their current phone has, and even if they know they will never use a new feature.

- Some see the purchase of an iPhone as a sign that you’re “going somewhere” and have “arrived.”
- Apple products are seen as being “cool” and “stylish.”
- Android products can be viewed as being more unrestrictive than Apple products.
- Blackberries are viewed as being very limiting and respondents say things like the camera “sucks”.
- When talking about their past phones, they sometimes identify it by a feature, such as a large screen, or slide-out keyboard.

“Now everybody wants a bigger phone. The screen is bigger, that is good. You can watch videos and play games. With a flip phone, you can just talk, text, and Tetris.”

“This phone (iPhone) has more stuff than I can do, but it's still good to be able to do it even if you will never use it.”

What is Mobile?



For Millennials to consider a device “mobile,” size and quick accessibility for immediate use are important:

- The device must be small enough to fit in places that are readily accessible, including pant pockets, purses, and bras (per respondents).
- The device needs to be large enough to at least see images, photos, and products on websites.
- Tablets, while they can fit in purses or be carried, are borderline mobiles: they are carried for a specific purpose, such as schoolwork, business work, or to entertain children in cars.
- Laptops are barely considered mobile, except for school or job requirements.

Jail Breaking, Rooting, and Shooting

Millennials use a variety of work-arounds to enhance their mobile experiences:

- **Jail Break it (a term sometimes also used for rooting):** Respondents can jack their phone to unlock it, and gain access to otherwise inaccessible services. Apps such as Unlock.io, UnlockUnit, or magicJack are purchased.
- **Root it:** At a higher level, respondents report rooting their phones to gain access to apps, personalize a device more, completely block ads, or make a device a wireless hotspot (even if it voids the warranty).
- **Screen-shoot it:** Taking a screen shot from your phone is used as a tool to both enhance shopping, provide reminders for things when saved to a phone's home screen, or document things that are not supposed to be documented (such as racy SnapChat photos).

"My mom in Peru has magicJack too, and we talk that way and with Tango, WhatsApp, and Facebook."

"If I see a product I like when I'm browsing, I screen shoot it for later. Then I can go and look it up on my iPad to get more information."

"My brother is going to jack my phone. Even though it will void the warranty, I'll be able to do a lot more."

Trading Up

Hispanic Millennials frequently wait until their next plan upgrade to get the latest phone, but not always.



Hispanic Millennials look for a replacement device that:

- Sports the newest features or coolest design.
- Has a big screen, but not too big to easily fit in pockets or purses (if it gets too large, it ceases to become mobile and stays at home).

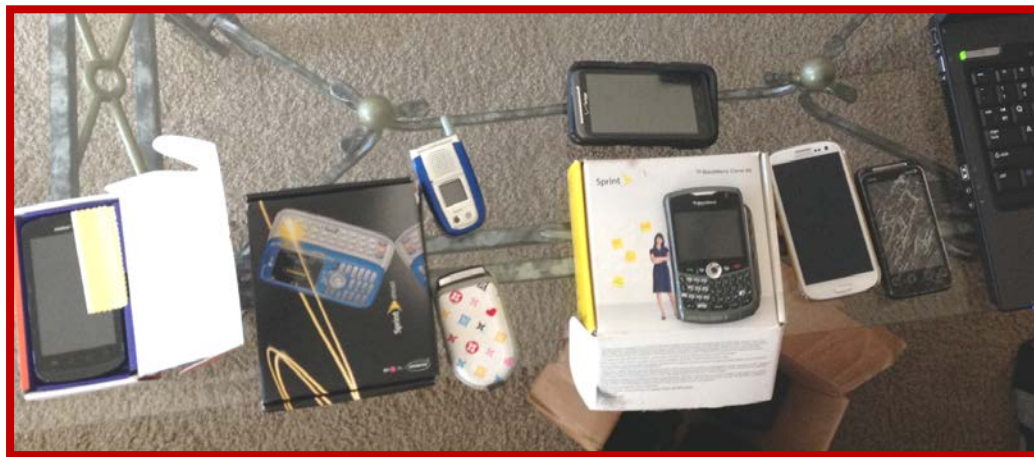
The old device either:

- Gets recycled (either given to friends or family, or placed in an electronics recycling area) or otherwise disposed of.
- Is kept....

Keeping Them

A surprising number of old phones are kept for specific purposes once a Millennial trades up for the newest device. Devices are kept:

- As a back-up for the current device, in case it is broken, stolen, or malfunctions.
- Held onto with the intent to sell the device at the highest price possible.
- Saved as an entertainment device for their children.
- Kept for sentimental and nostalgic value, especially if the device was their first phone, if it contains a game from their youth, old photos, or music.
- A device will be kept if it performs a function better than a current phone (such as taking photos). In that case, both phones will be in active use.



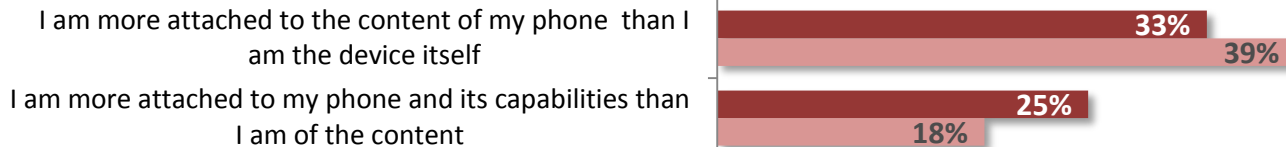
Attachment to Mobile Phones

% who endorse each statement as “true”

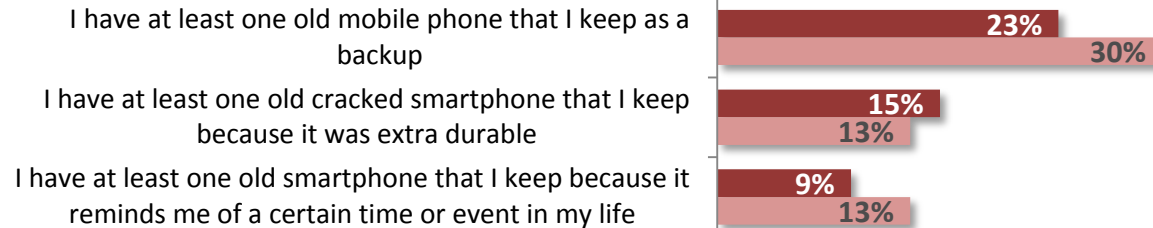
■ Hispanic (n=250)

■ Non-Hispanic (n=150)

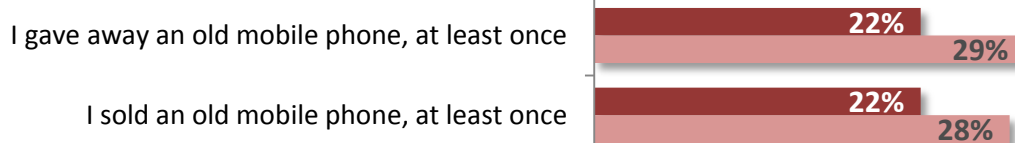
ATTACHMENT



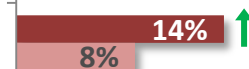
HOLDING ON



LETTING GO



None of these are true for me



↑ ↓ : Significantly higher / lower than other sub-groups, at 95% confidence level

Q13. Which of the following statements are true for you?

Hispanic Millennials and Non-Hispanic Millennials do not differ very much in their attachment to mobile phones.

About 1 in 3 report they are more attached to the *content* in their phones than the device itself, but **Hispanic Millennials are slightly more likely to say the opposite.**

Choosing Plans

Deciding on a phone plan is influenced either by parents, peers, ads, independent research, or a combination.

- Parents influence brand choice in many areas of life for an Hispanic Millennial, but these brands tend to be the “everyday task” brands, such as which grocery store to buy from or which laundry detergent to choose. However, mobile providers also falls into this category. As a result, many Hispanic Millennials end up on the same plan as their parents, or choosing the same provider if they end up on their own plan.
- Some respondents report looking at ads and doing their own independent research before deciding which provider to choose. But this is the minority.

“I didn’t want anyone to influence my decision. So I looked at ads and did my own research online before choosing. I decided to go for a pre-paid plan. I don’t want surprises on my bill.”

Choosing Plans

- Choosing a plan based upon what a boyfriend or girlfriend has, or choosing a first independent phone plan together is a common practice among young Hispanic Millennials.



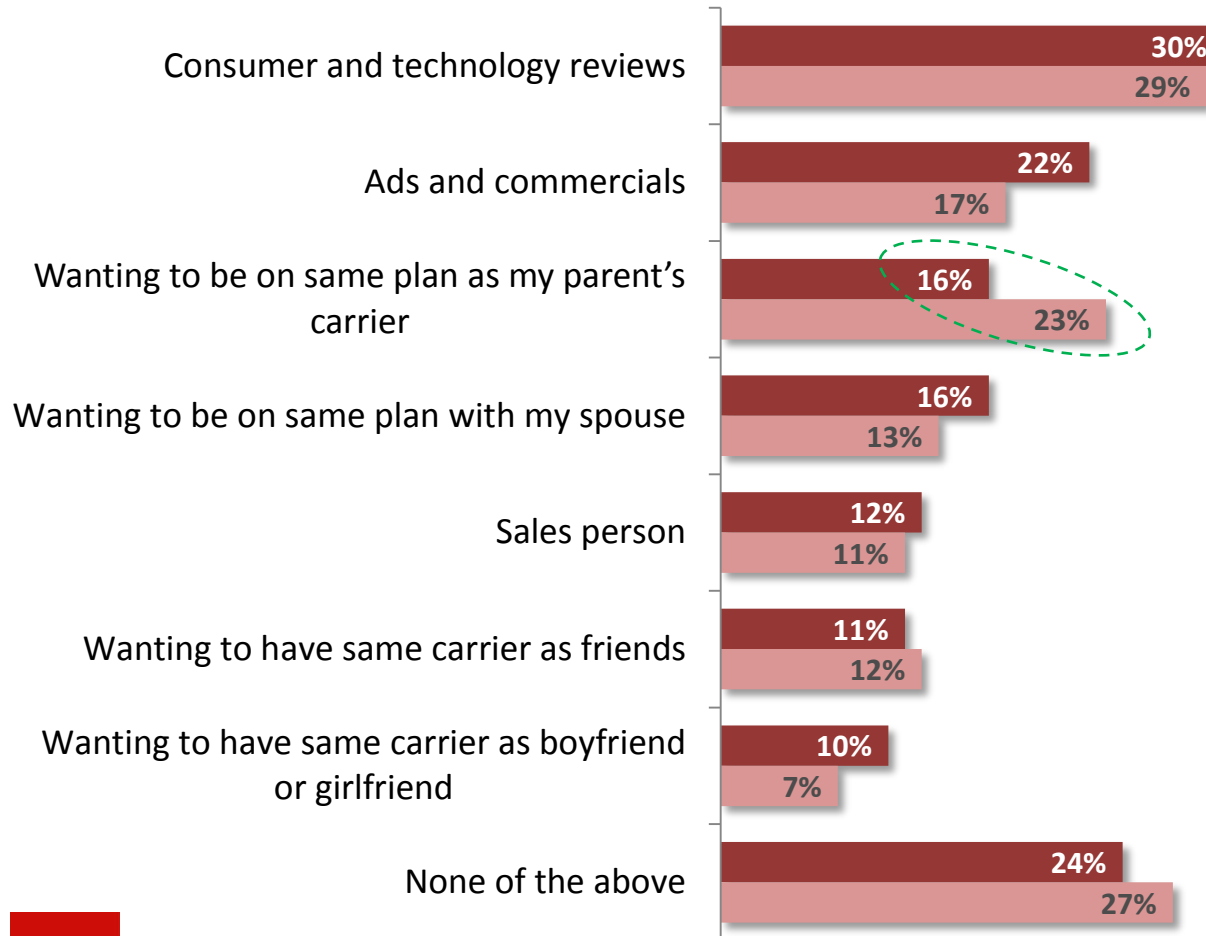
"I used to have T-Mobile when my parents first signed up for a family plan, but the customer service and signal were awful, so I broke the contract and went with Sprint. Then I got a two-line plan with my girlfriend."

"When I was 16 I opened my own account in my dad's name. I chose AT&T because my boyfriend had it and we could talk for free."

Influencers Over Wireless Carrier Choice

■ Hispanic (n=250)

■ Non-Hispanic (n=150)



Non-Hispanic Millennials are somewhat more likely to self-report that their wireless carrier choice was influenced by their parent's carrier plan, but overall there are no survey self-reported differences between segments.

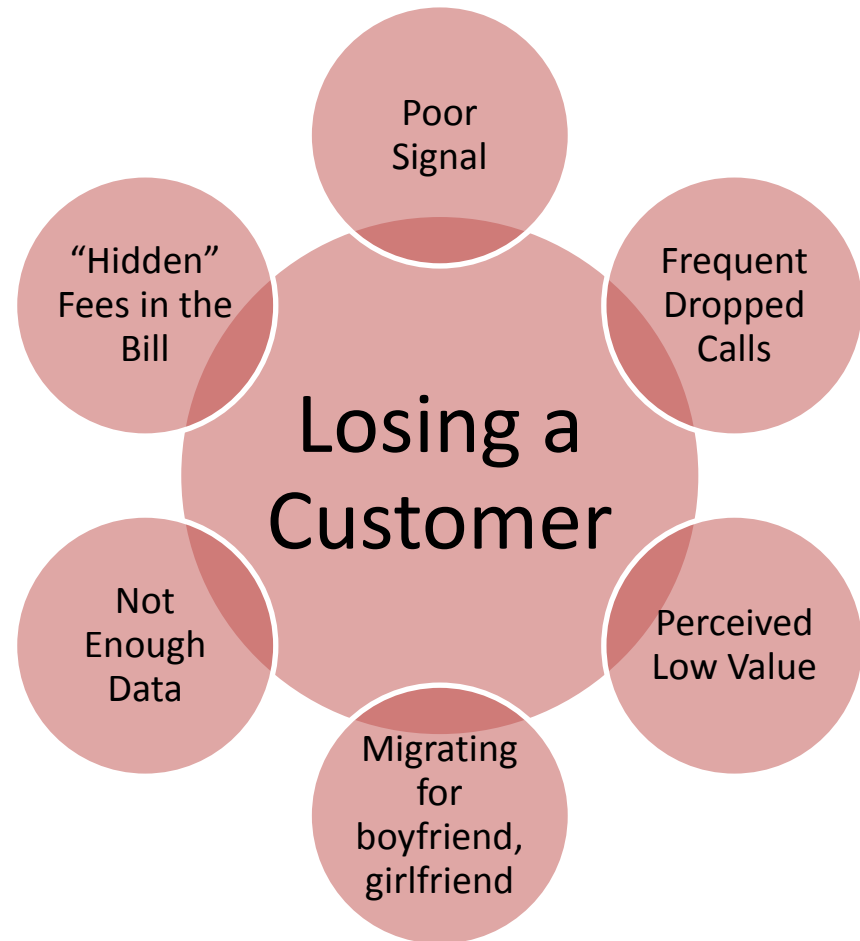
For all Millennials, consumer/technology reviews and advertising are big influencers.

↑ ↓ : Significantly higher / lower than other sub-groups, at 95% confidence level
Q9. Which of the following have ever influenced your choice of a wireless carrier?

Moving On

What motivates an Hispanic Millennial to leave one provider and seek out another?

Once an Hispanic Millennial has a bad experience with a provider, they will remember this and move on to another.



Budgeting and Buying: Money



"My current phone is an iPhone 5s. I also have a 4s that still works but it's cracked. When I got the 4s I didn't save for it, I just decided I wanted it and used one of my paychecks for it."

Few English Dominant Hispanic Millennials reported any budgeting for their mobile devices or plans, and there was no budgeting for peripherals. Work-arounds also existed to bypass costs:

- Respondents chose free apps for most of what they were interested in. The only apps they consistently reported paying for were apps that unlocked features on their phones (Mobile Unlocking, Unlock Unit, etc.).
- Fees were bypassed using third party apps, such as WhatsApp, Tango, etc.
- New phones were purchased either by waiting for the next upgrade, or just buying the phone outright, with no budgeting.
- In general, the more acculturated respondents were into the American capitalistic consumer culture, the less careful budgeting took place.

Budgeting and Buying: Data

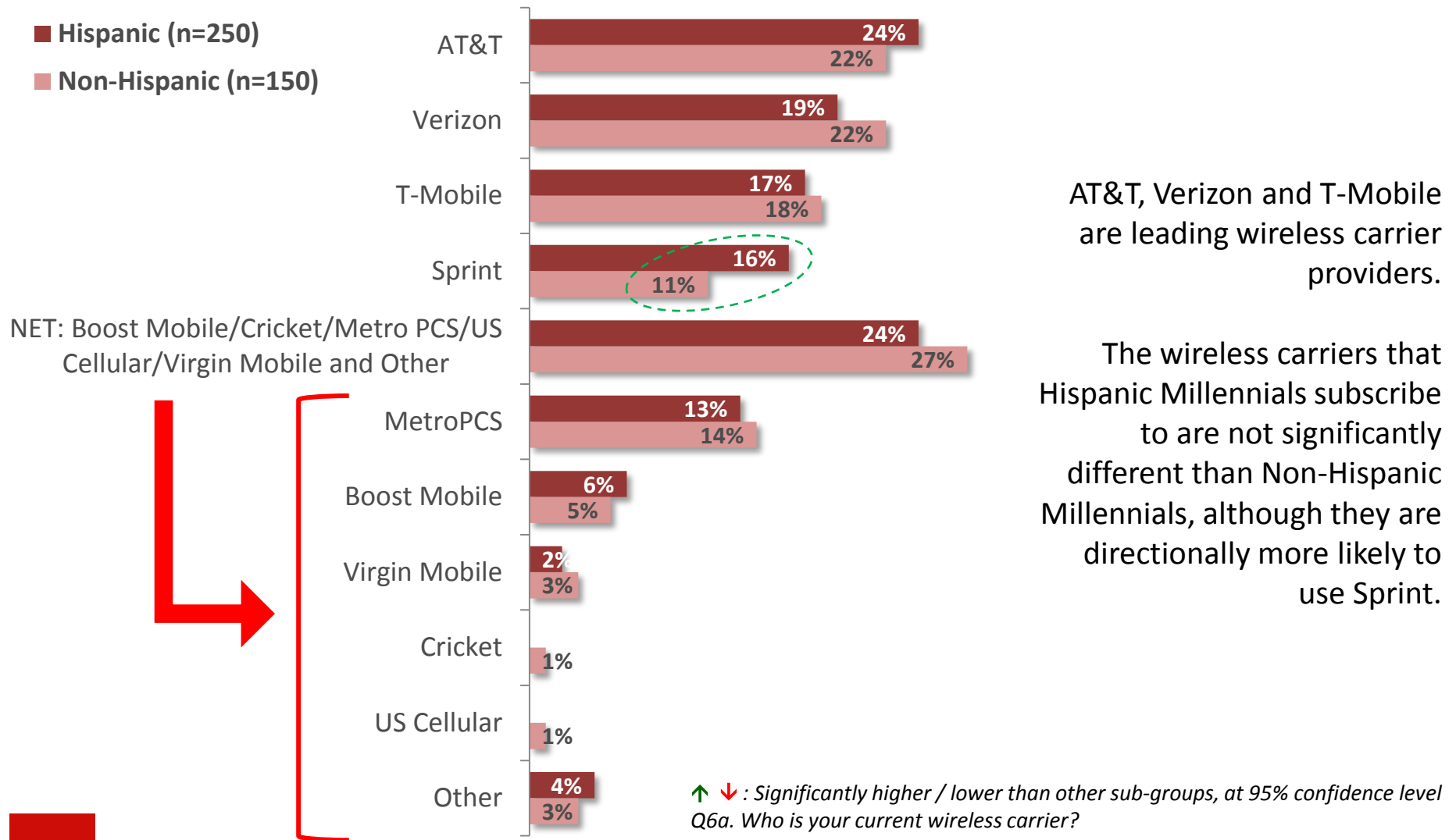
Data is very important; arguably more important than the cost of a plan. Unlimited texts and data are considered necessities to most, and not a luxury or optional item. (Very few respondents brought up connection speed as a priority.)

- If a respondent did not have an unlimited text and data plan, they frequently ran into problems, even if they checked their usage. Overages in data usage are what convince many to purchase an unlimited plan.
- The exception to this is the rare Millennial (usually a busy parent) who does not use a data plan with any regularity.
- This relates to the issue of **paying for Wi-Fi hotspot**: Wi-Fi is not an issue if you have an unlimited data plan. Therefore, Hispanic Millennials report only purchasing a hotspot if they use a tablet outside of the home.



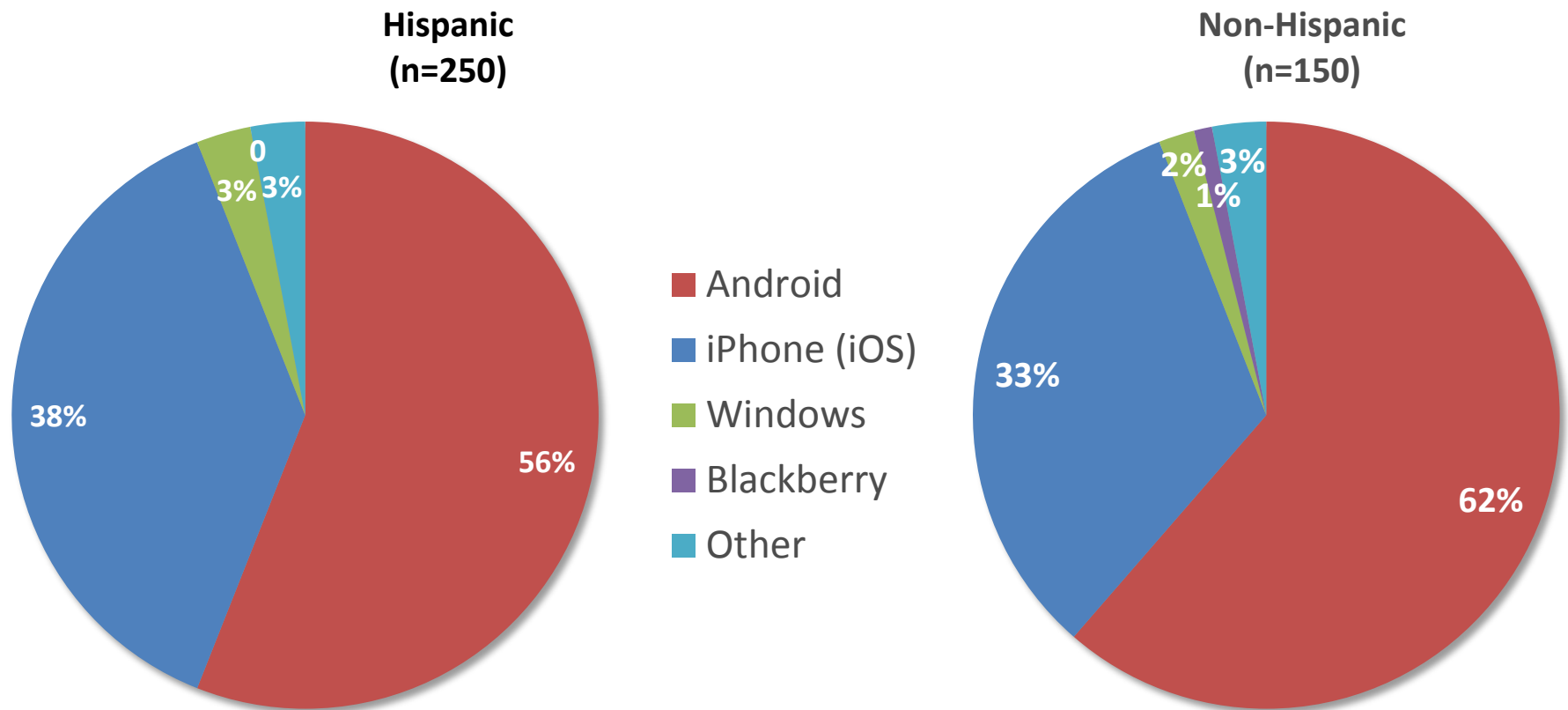
"I used all my data up in two weeks once (music downloads). It was murder trying to get through the next two. Now I budget my data usage."

Who is their Wireless Carrier?



What Type of Smartphone Do They Have?

The type of smartphone used by Hispanic Millennials is not significantly different than Non-Hispanic Millennials, although they are slightly more likely to use iPhones and slightly less likely to use Android phones.

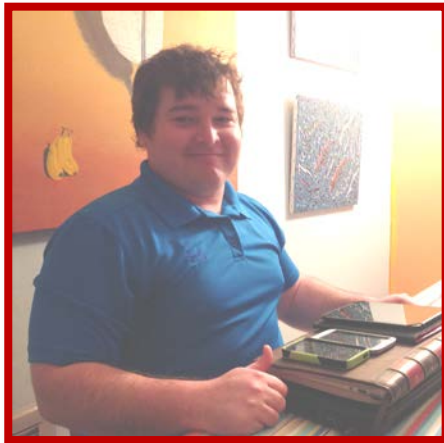


↑ ↓ : Significantly higher / lower than other sub-groups, at 95% confidence level
Q6b. What type of smartphone are you using?

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About Pacific Ethnography

Facebook/Instagram

- Facebook and Instagram are the two most widely reported social networking platforms. Twitter is a distant third.
- Facebook is used 24/7. There is rarely an “off” time. It is part of daily life, there with them always.
- There are mixed preferences for friending just family and real friends, or friending anyone who sends you a friend request.



“I keep up with my relatives back in Mexico because we’re all on Facebook.”

“I get up 15 minutes early every day to check my Facebook.”

*“I didn't have a relationship with my grandparents because talking on the phone was weird. I would say hi, but, wtf?”
(Conversation was awkward and limited.)*

Texting

“My boss texts me all the time because he knows I’ll see it. He texts me to come in early. It’s irritating.”

“I send texts to my in-laws in El Salvador with an app. It’s free that way.” (Rebtel)

“I signed up for texts with Snapple, Kohl’s and Target.”

- Texting is engaged in constantly, including in the middle of the night.
- Texting takes place with friends, classmates, and the boss.
- Drunk texting is a reality that elicits knowing glances and embarrassed eye rolls.
- International texts to family using free apps takes place, though sometimes people are confused when they see an unexpected charge for an international text that they believed was going to be free.
- Millennials sign up to receive texts from brands they are interested in, and don’t consider such texts to be spam. That’s because they chose them.

Email

- People email throughout the day, but generally not all night.
- Emails can be more important than texts (but not always), but there is also the expectation that there will be a delayed response.
- There is a sense of higher control over content with email. You can control when you look at email, when you respond, and you can easily block someone if you want, or ignore them.
- Email is seen as being less intimate than texting; it is a more formal communication.
- Having multiple email accounts is the norm: one can be designated for close friends, one to give out when you know you'll end up with a lot of spam, one for work or school, etc.
- If someone has multiple email accounts, some are accessed only through a PC, while others link to the mobile phone.
- Emails from companies that they sign up to receive are viewed as bona fide communication and not junk emails.

“Email is more formal than texting, and it is more important.”

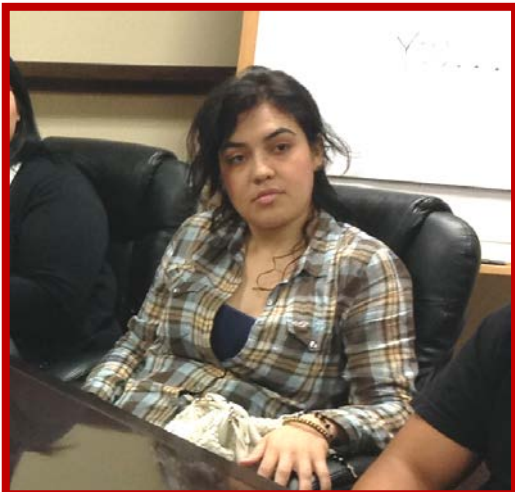
“With email I have more control over attachments that might come through, like if someone sends me a picture I don’t want anyone else to see.”

“You only have one text number, but you can have a ton of email accounts. It gives you more control.”

Phone Calls

Phone calls are the exception, and when a phone call takes place it is usually because:

- The Millennial is talking to a family member of high importance.
- The Millennial is taking a business or school call they know they can't avoid.



*"Who talks on the phone now?
Getting a phone call is like
getting an uninvited visitor to
my house."*

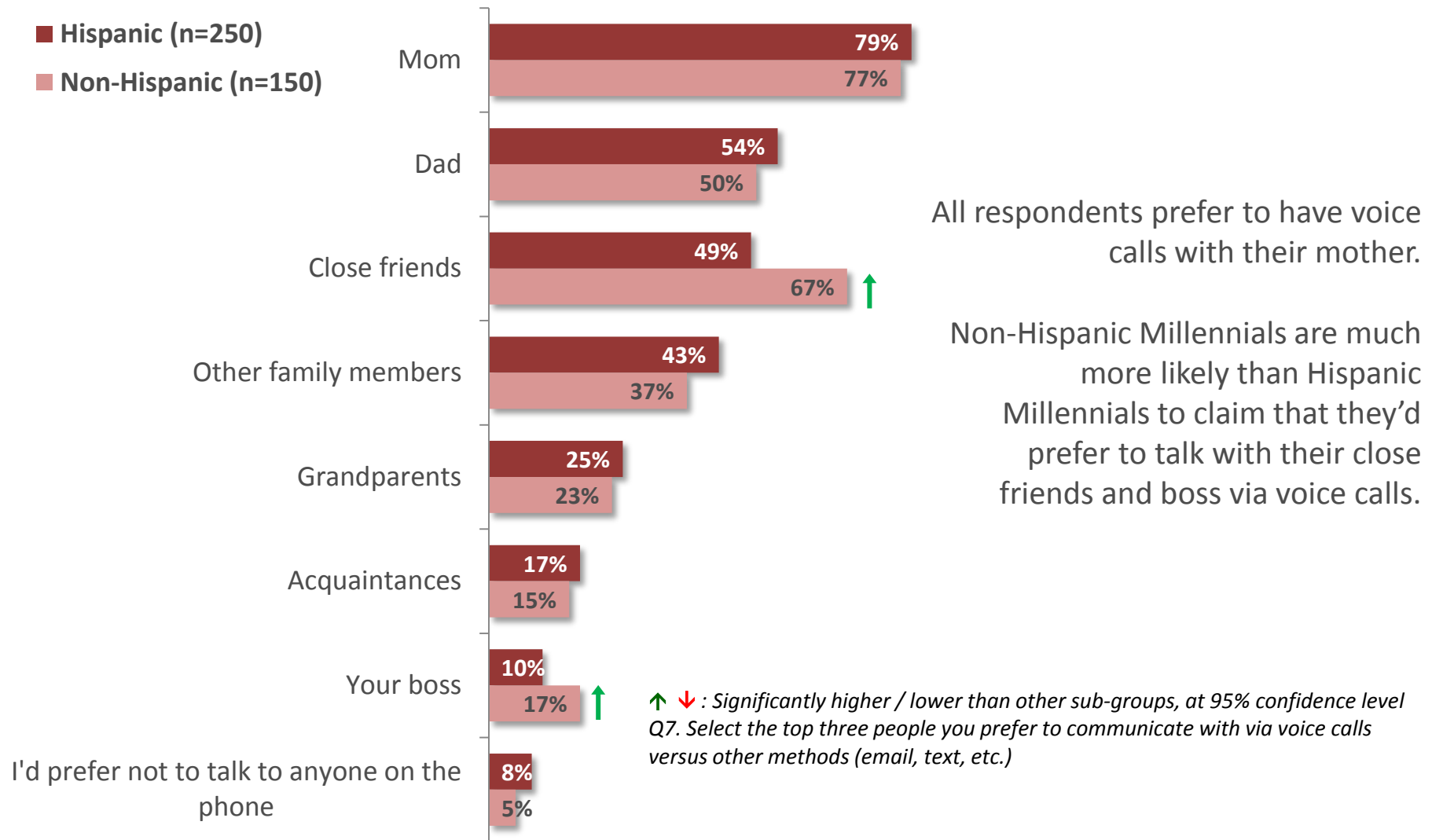
"I try to stay on the phone for as little as possible. My friends know I won't answer if they call."

"I call my mom. That's it."

"Some members of my family, the older ones, don't text or anything. You have to call them. Like my grandparents."

"I want to call my wife, but she doesn't want me to. She wants me to text her."

Voice Calls Preference Over Other Methods



Apps

"I use apps for everything all the time. Except I don't use them at work, at Mass, driving, or having dinner. Or in class."

"I use an app to track my ovulation. I got pregnant once because I didn't listen to the damn app!"

"My bank has an app that I use, and I have a thing where I control my inventory. I think it's called 'My Things.'"

- Apps are used for everything, all the time. If there is a service they want, they will seek an app for it as long as the app is free.
- They will pay for apps as long as it unlocks features on the phone, like Unlock.io or UnlockUnit. Otherwise, they report not paying for apps because "You can always find an app to do what you want for free."
- Respondents with children say they're amazed at how quickly their children, as young as 1 year old, pick up on using apps.
- Some popular apps reported include:

ESPN
Sound Cloud
Mommy Saves
Big
Tango
Cartwheel
MBA
Netflix
Groupon

YouTube
Instagram
Twitter
Facebook
Pinterest
Flashlight
Shopular
Weather
RetailMeNot

Vibe
Live
TMZ
My Things
GPS
Price Checker
Amazon
Etsy
Laced

Online All the Time

There is no such thing as being “offline” to Hispanic Millennials. In many ways, they don’t even understand the concept. While we (non-Millennials) remember a time when it took time and effort to get online, Millennials don’t have this separation. Online is “on” all the time, somewhere and someway. Being online is “*passively active*”.

“My iPhone is always close by and on, in case someone needs my help, or for my family or boyfriend to contact me. I also check shopping apps, my Facebook, and other websites all the time.”

“When your family is watching TV together, you can watch something else on the phone.”

Even when they intentionally turn their phones off, or leave them at home because they want to be detached, they still consider themselves as being online; they have simply chosen to hide.

The only time they may find themselves truly offline is when/if they visit their home country.

“When I visit Guatemala, I am completely offline, with only a pre-paid phone, but it doesn’t have internet. I don’t like that it takes longer to do things that I can do immediately on my iPhone, like sending email, banking, shopping, and using my apps.”

Making Connections

How Hispanic Millennials connect with the wider world falls into these five main categories, and they use a variety of mobile tools to assist them with those connections:



General Mobile Attitudes & Behaviors

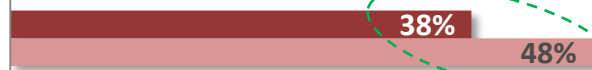
% who endorse each statement as “true”

■ Hispanic (n=250)

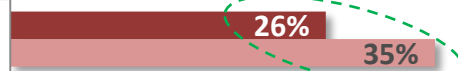
■ Non-Hispanic (n=150)

HOW COMMUNICATION METHOD IS CHOSEN

I choose a communication method depending on the person I need to reach



I choose a communication method depending on the topic/information



I choose a communication method according to how much money it will cost me



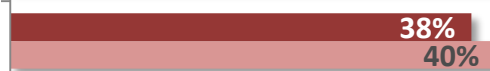
Non-Hispanic Millennials endorse a number of attitudinal and behavioral statements somewhat higher than Hispanic Millennials.

ATTITUDES TO TEXTING & SOCIAL MEDIA

Texting is the easiest way to communicate



I like social media because I can reach friends and family all at once



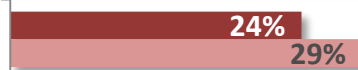
Non-Hispanics are notably directionally more likely to say their communication method choice is based on who they're trying to reach and/or the topic of discussion.

ATTITUDES TO VOICE CALLS

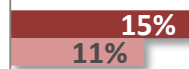
I think there is tremendous value to hearing someone's voice



I wouldn't mind giving up voice calls, as long as I can keep text and data



Unplanned phone calls are rude and intrusive



Phone calls and voicemail seem out-dated



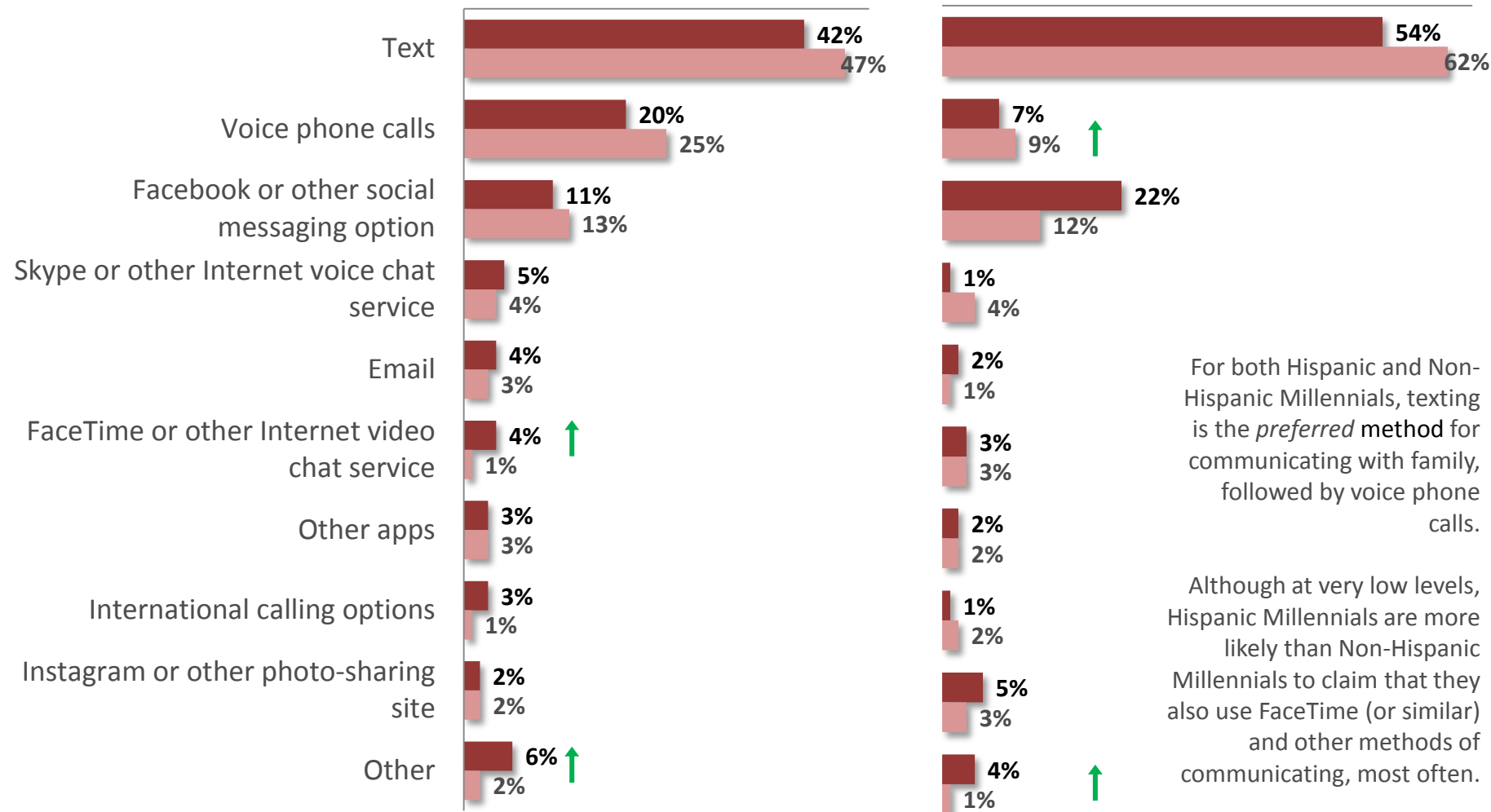
↑ ↓ : Significantly higher / lower than other sub-groups, at 95% confidence level

Q17. Which of these statements do you feel is true for you?

Most Often for Communicating with...

Family

Friends



For both Hispanic and Non-Hispanic Millennials, texting is the *preferred* method for communicating with family, followed by voice phone calls.

Although at very low levels, Hispanic Millennials are more likely than Non-Hispanic Millennials to claim that they also use FaceTime (or similar) and other methods of communicating, most often.

■ Hispanic (n=250) ■ Non-Hispanic (n=150)

↑ ↓ : Significantly higher / lower than other sub-groups, at 95% confidence level Q14. Which do you use most when communicating with family?

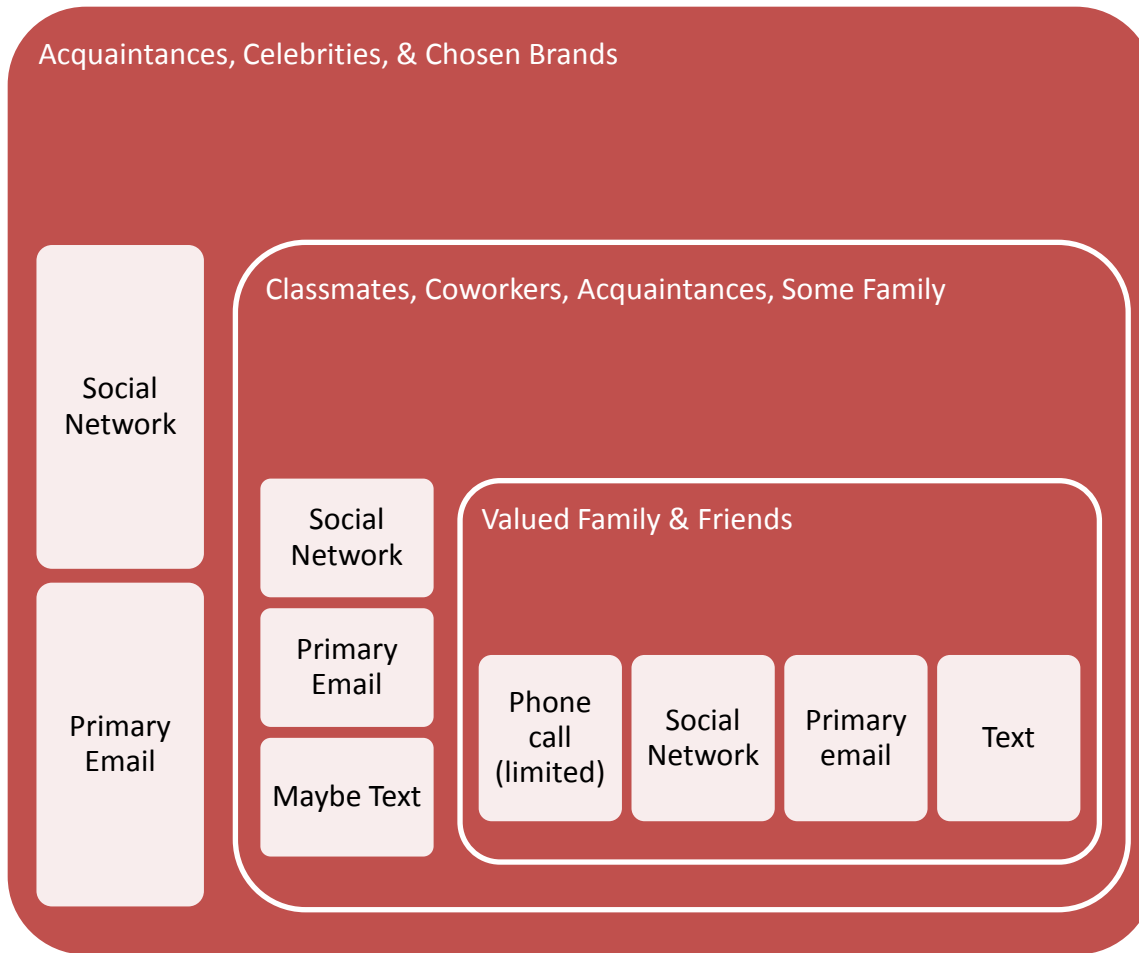
Emotional Connections

Hispanic Millennials sometimes make distinctions between “real world” communication and communicating via mobile. Mobile communication can reflect a desired identity in some instances, but in most instances it reflects “real world” views and behaviors, just on a more saturated platform:

- Comments on photos (on Instagram, Facebook, or other photo sharing option) are considered real communication. They are not always just “throw aways” to fake interest.
- Some report that texting allows them to communicate better, deeper emotions than talking to someone face-to-face. Emoticons or emojis are considered by some Millennials to be a more efficient way to display their emotions, and perhaps an easier way.



Layers of Connection



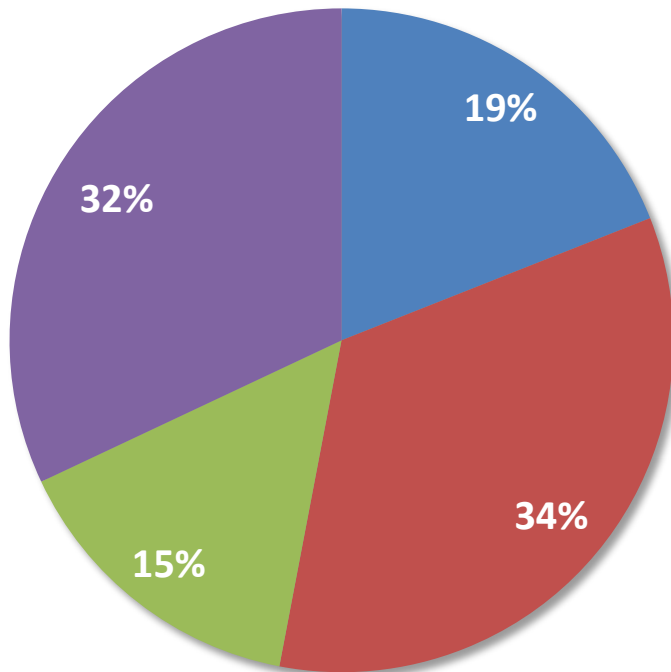
Mobile technology allows Millennials to create a controlled access shield around themselves, wherein they can choose who gets more intimate levels of access, and who remains on the outer, superficial layers, like an onion.

Brands that have not been chosen or opted-into do not rate a layer. In cases where Millennials are forced to provide an email to gain access to a one-time benefit (such as reading an article), they provide false or “junk” email addresses.

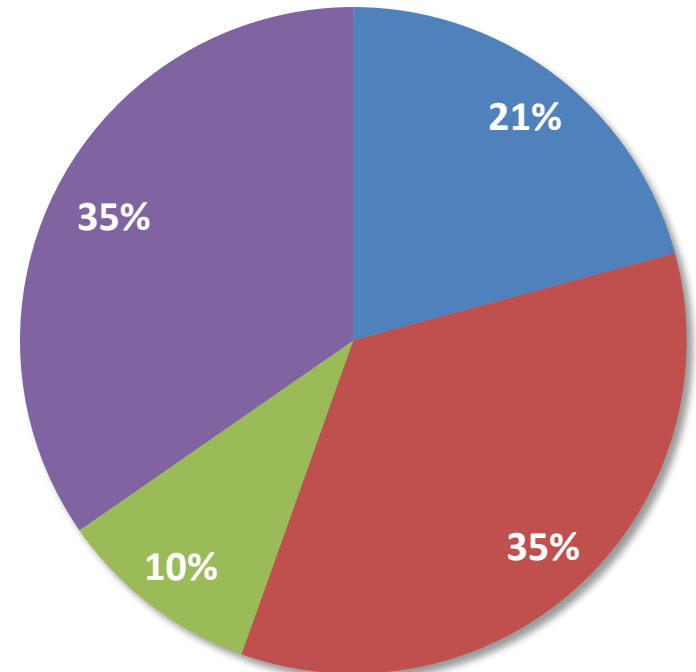
Receiving Emails from Brands on Smartphones

Hispanic and Non-Hispanic Millennials have the same attitude towards brands sending them emails on their smartphones: one-third don't want any emails, one-third don't mind emails they opt into, and the rest are split between either liking many different emails or getting emails from brands similar to those that they already follow.

**Hispanic
(n=250)**



**Non-Hispanic
(n=150)**



- I like to get emails from many different brands
- I like emails only from brands that I opt into
- I like emails from brands similar to those that I already follow
- I don't want to get emails from any brands

↑ ↓ : Significantly higher / lower than other sub-groups, at 95% confidence level

Q11. Which one of these statements is most true for you when receiving emails from brands on your phone?

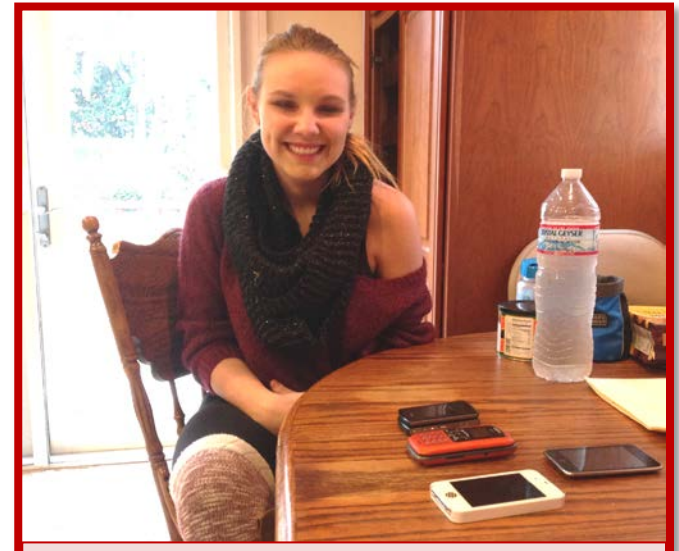
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Learning Styles

How do respondents learn about phones, plans, tips, and tricks? It depends upon their culture. Anthropologist Margaret Mead teaches us that cultures fall into three main categories when it comes to teaching and learning:

- *Postfigurative*: The young learn from their forebears.
- *Cofigurative*: The young learn from their peers.
- *Prefigurative*: It goes both ways: the forebears are capable of both learning from and teaching the young, and vice versa.

Fully acculturated Hispanic Millennials (along with Non-Hispanic Millennials) fall into the prefigurative category: they learn from both their forebears (parents, aunts, uncles) and from their peers, depending upon what the topic of interest is. Spanish Dominant Hispanic Millennials will adhere more to the learning style of their home culture.



"I had an android, but then my friends had iPhones and I couldn't do what they did, like Instagram and Twitter. So I used my mom's upgrade and finally got an iPhone 2 years ago. I love it because I can do everything on it and it's by my side 24/7."

(Non-Hispanic Millennial)

Learning About Brands

Learning about brands and products is a cultural experience, and from where Millennials learn about brands and brand loyalty depends upon what category of brands they are learning.

- **Parents** influence brand choice in many areas for Hispanic Millennials, but these brands tend to be the “every day task” brands, such as which grocery store to buy from or which laundry detergent to choose.
- **Friends and peers** influence what can be perceived as “cool” brands, such as apparel, vehicles, or specialty stores.
- **Mobile plans and providers** are learned about from parents, peers, and ads. As a result, many Hispanic Millennials either end up on the same plan as their parents, selecting a plan based upon what peers (boyfriend/girlfriend) use, or they take input from family and friends and do their own research. They also pay attention to ads about mobile devices.
- **Yes, ads** do influence Hispanic Millennials when it comes to mobile plans and providers. Ads can be welcome, but only if the Millennial controls the receipt of ads.

**From this study, there are two additional “Ps” to Hispanic Millennial marketing:
Parents and Peers (other Ps include Placement, Promotion, and Price)**

Learned Brands

As part of the qualitative fieldwork, respondents were asked to both free-list favorite brands, and rank favorites from a list of pre-generated brands. Here are the top five most frequently listed/ranked brands for each exercise among our English dominant and Spanish Dominant Hispanic Millennials. (Note that the meaning of “brand” to Hispanic Millennials is different than the meaning used within the marketing industry. As anthropologists, we speak using the language of the respondents.)

Free List: English Dominant	Free List: Spanish Dominant	Guided List: English Dominant	Guided List: Spanish Dominant
Nike	Target	Facebook	Facebook
Apple	Walmart	Walmart	Instagram
Target/Walmart*	Starbucks	Google	Google
Instagram	Victoria's Secret	Netflix	Univision
Disney	J.C. Penney	YouTube	YouTube

* Target and
Walmart were tied.

Advertising

“I watch the countdown on YouTube ads so I can skip them.”

“I’ll mute ads if I’m forced to watch them.”

“If a YouTube video has an ad I won’t even watch it.”

“If I see an ad for something I’m interested in buying, I’ll watch it.”

“I like ads that are sentimental or cute.”

“Have you seen that new Cheerios ad? I love that ad.”

Hispanic Millennials are not anti-ad! In fact, they like ads. What they want, however, is **choice of when those ads appear**. Hispanic Millennials will frequently sign up to receive emails from companies they are interested in. They treat these emails as bona fide communication instead of junk mail. They like these emails because they **choose** to get them.

Ads in general can be welcome if:

- It is about something wanted for a purchase.
- It is about a celebrity of interest.
- Represents a specific style preference.
- It is cute or sentimental.
- They represent American ethnic diversity.
- It is an ambiguous ad that creates curiosity and buzz.

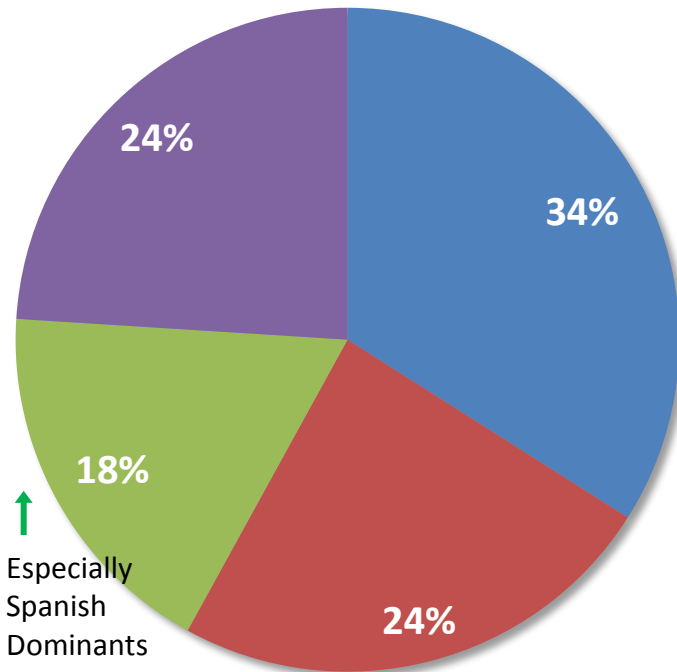
Pop-up ads are universally disliked.

Dubbing ads filmed in English with Spanish speakers is universally reviled.

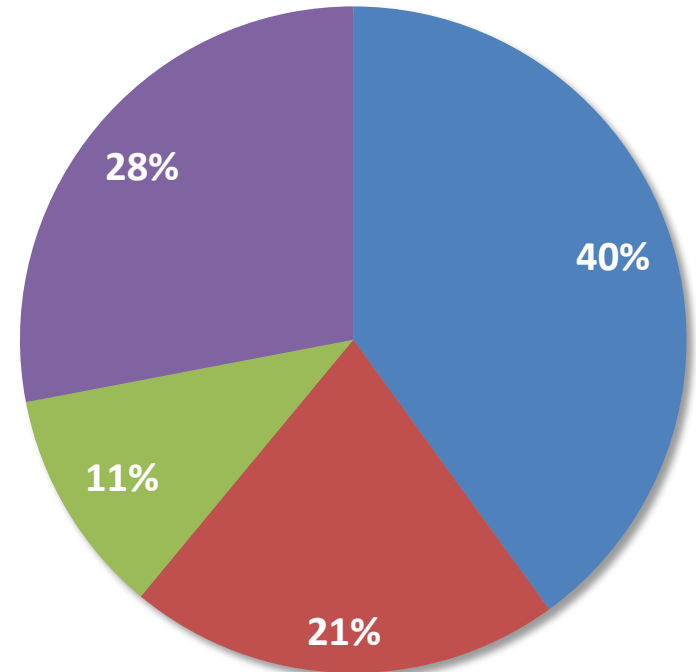
Viewing Advertising on Smartphones

Hispanic Millennials are significantly more likely than Non-Hispanic Millennials to enjoy seeing ads for new products or services on their phone; however, one-third (34%) self-report ignoring all ads, and 1 in 4 (24%) self report not minding advertising as long as it's non-intrusive (as long as *they* can choose when to view them).

Hispanic
(n=250)



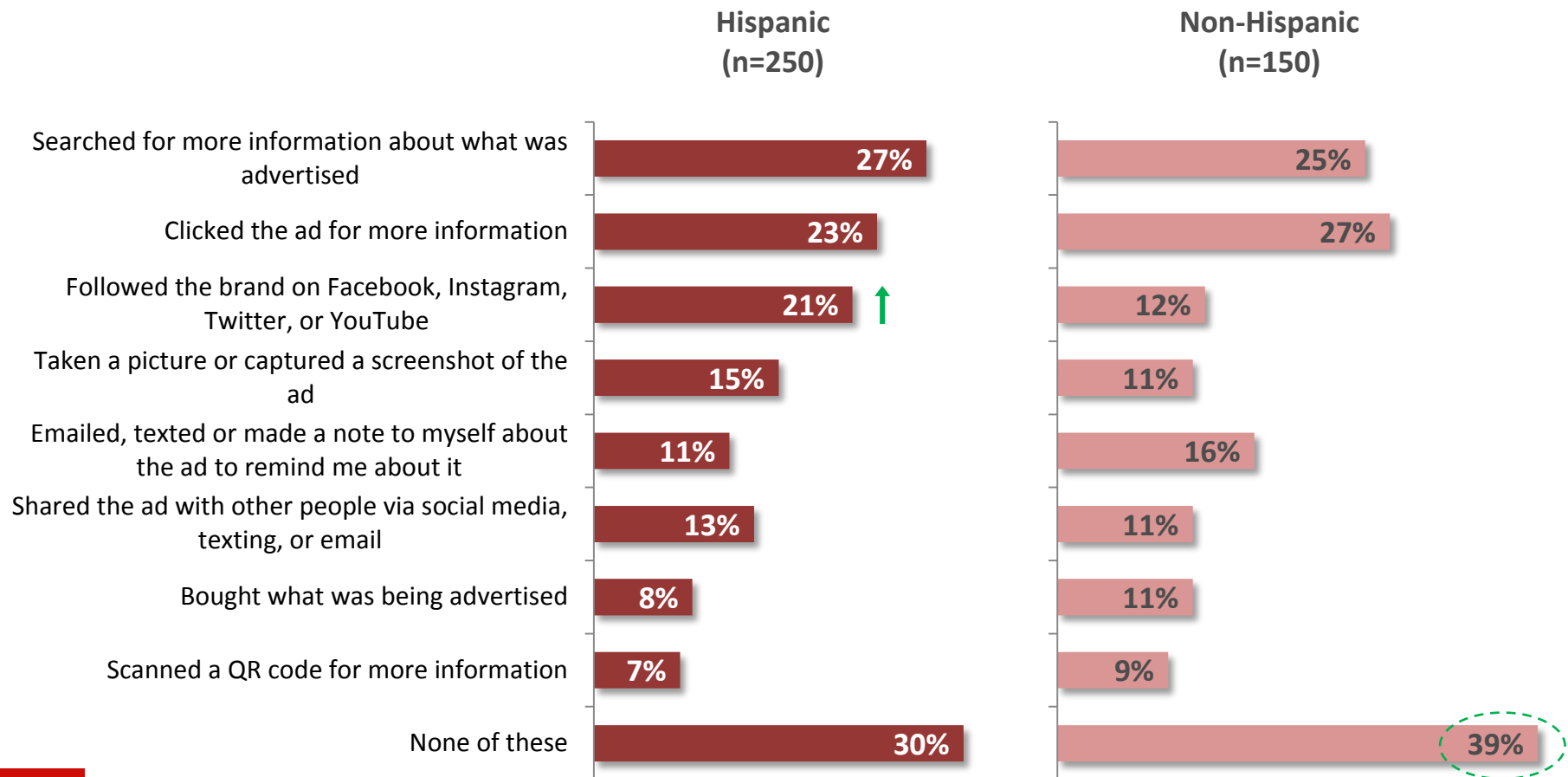
Non-Hispanic
(n=150)



↑ ↓ : Significantly higher / lower than other sub-groups, at 95% confidence level
Q10. Which one of these statements is most true for you when viewing ads on your phone?

Actions on Smartphones after Seeing an Ad

Although their behaviour does not vary widely, Hispanic Millennials are much more likely to self-report following a brand on social media after seeing an advertisement than Non-Hispanics. Non-Hispanics are somewhat more likely to claim they didn't take any action after seeing advertising on their phone.

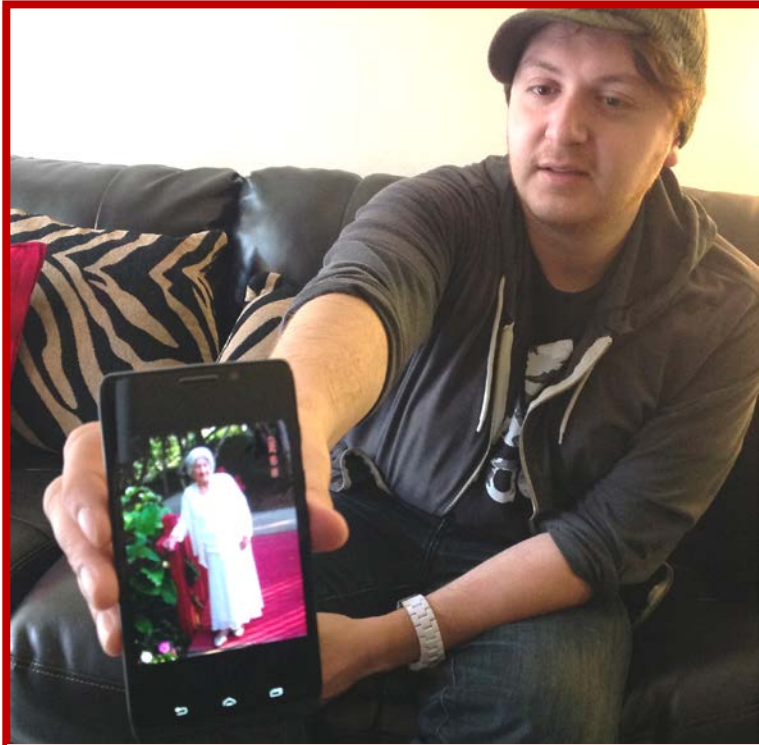


↑ ↓ Significantly higher / lower than other sub-groups, at 95% confidence level
Q12. After seeing an ad on my phone I have...

Hispanic Millennials and Mobile

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The Power of Mom



"I call my mom. That's it."

Mom is special, and she gets treated with a higher level of reverence when it comes to communication and concern:

- Mom is generally the only one that is given a regular phone call. Grandparents come next. No one mentioned needing to call their father.
- Phone calls are seen as a way to keep a watchful eye on mothers.
- Mothers frequently are involved with and influence the choice of first independent mobile plan carrier (along with the choice of other day-to-day brands).

"My mom doesn't have a cell phone. How can I protect her if I can't reach her?"

Parenting & Controlling Access

Parents are split about letting their children use mobile technologies. Some use them as learning tools, some as virtual baby sitters, and some restrict use:

"Sometimes I give it (smartphone) to my two-year-old and say, 'Here! Go get distracted!'"

"We restrict Google and YouTube for our kids. They can get access to all kinds of things there."

"I give it to my kid sometimes. Like when we're riding in the car, or at a restaurant. It's amazing they know how to scroll by age one."

"It was important that the tablet I picked had a child mode, but wasn't just for kids. My daughter would get bored with something like a LeapPad, and the tablet needed to work for both her and I."



This toddler is using an iPad, while her older sister is on her smartphone. The mother is shopping.

Maintenance & Connection



- Relationships with family members who don't use social media suffer; phone calls are not used except with very close family, like mom.
- On the other hand, social media makes it much easier to connect with more distant (geographically and otherwise) family members than would be possible without social media like Facebook.
- Grandparents are typically the main link between Hispanic Millennials and their connection back to their native country. When grandparents die that connection diminishes, even if the Millennial was born in that country.

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Nostalgia



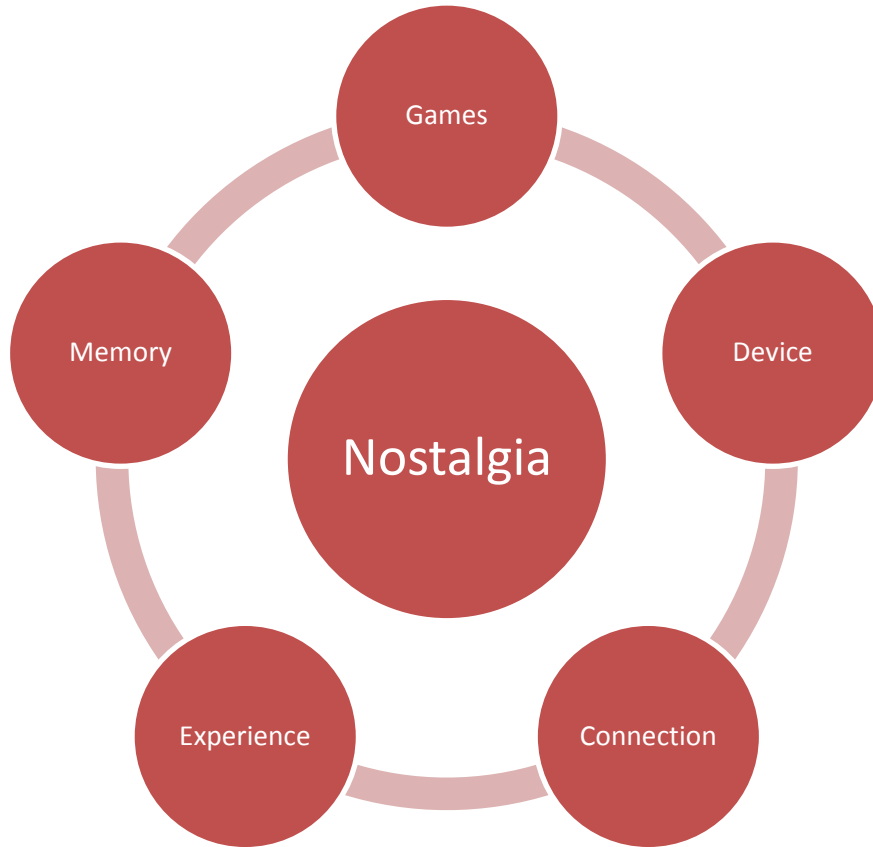
This phone has earned respect because it is cracked, but still works.

Nostalgia plays an important role when it comes to mobile phones. It can dictate what happens to a phone after it has served its purpose and is replaced by another unit.

- The first mobile phone ever owned, or the first phone purchased independently, are symbols of a rite-of-passage deeper into adulthood and increased independence. This symbolism frequently means the phone is kept as a memento, especially if it holds beloved games or text conversations.
- Mobile phones that are especially durable garner much respect and are frequently saved. This indestructibility is often seen in earlier phones, like flip phones.

"My mom got a smartphone before me. All my friends had smartphones before me, but I loved my slide phone. It did everything -- I loved the keyboard more than the touch screen. I didn't need a case for it, because it was indestructible."

Nostalgia



Nostalgia is attached to several phone attributes:

- **Games:** Angry Bird scores, Tetris, etc.
- **Device:** Hardiness, design complexity, right-of-passage, reliability in hard times.
- **Connection:** Text conversations.
- **Experience:** Photos, images, notes, video.
- **Memory:** Phone as right-of-passage, reminder of a life event.

Note: Being able to back up content and store it in another location is not the point. The device itself holds meaning as it relates to the content. In fact, few report backing up their devices.

Nostalgia & Device Complexity

There is a dynamic push-pull that is present between nostalgia, device content, and device complexity.

- As the complexity for a device increases (say, the newest iPhone), the nostalgia associated with its content decreases.
- High nostalgia for content is felt towards older phones that have more poignant content stored on it.
- The simpler the phone, the more important the content becomes. But not always. For some, the memories associated with a phone are valued more highly than the phone itself, even if it is a smartphone.



Icons of Emotion

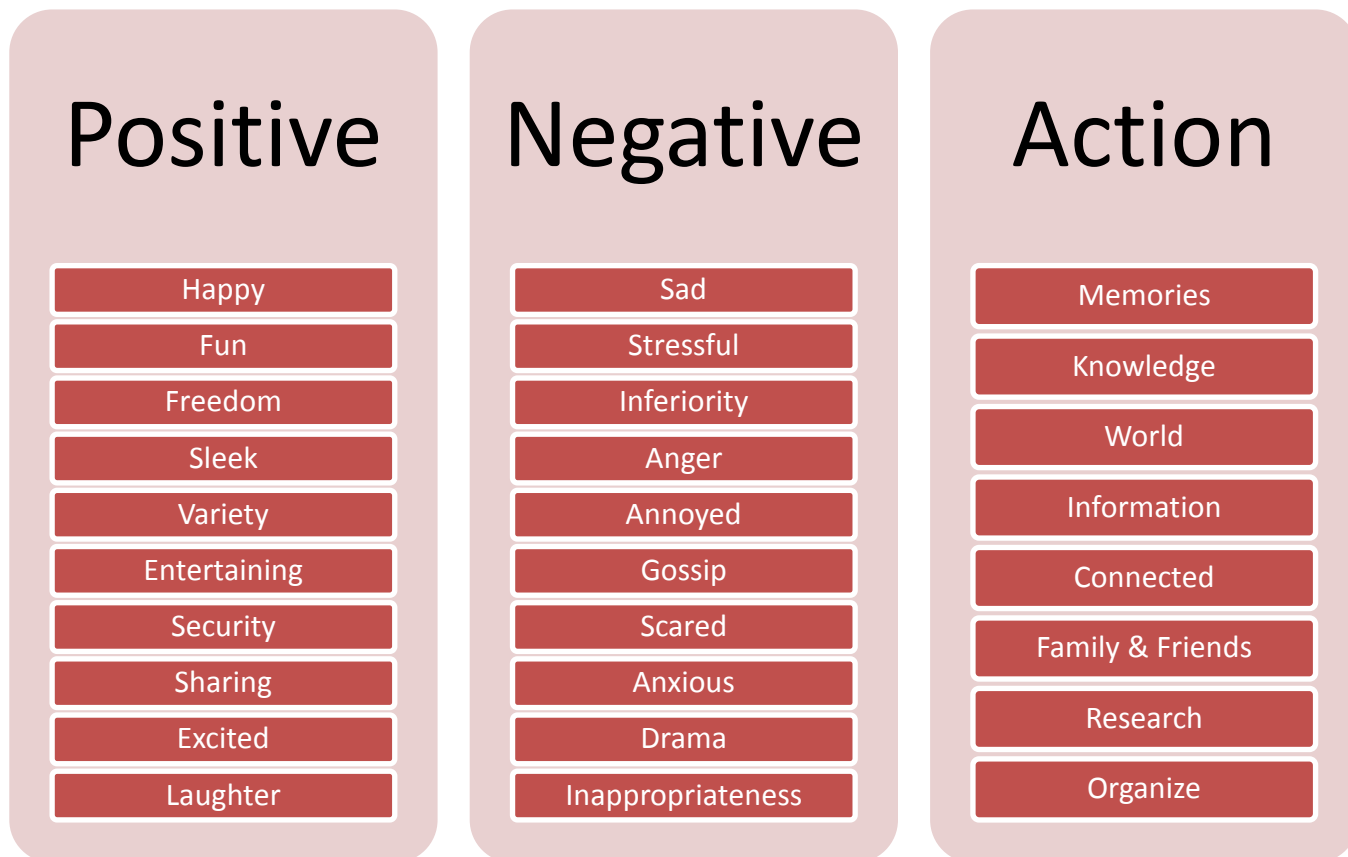
Strong life experiences can be attached to mobile devices, from the first phone someone owned, to a specific phone being associated with a life-changing and emotional event:

“This phone has seen it all. It was there when the phone call came in that my grandmother in Guatemala had passed away. It was hard on my mother, because they were really close. While I’m not attached the phone as an object, I am attached to the content and the connections it made possible.”



Icons of Emotion

Respondents feel very strong positive and negative emotions towards their mobile technology and its capabilities. They also view it as a definite tool for specific uses:

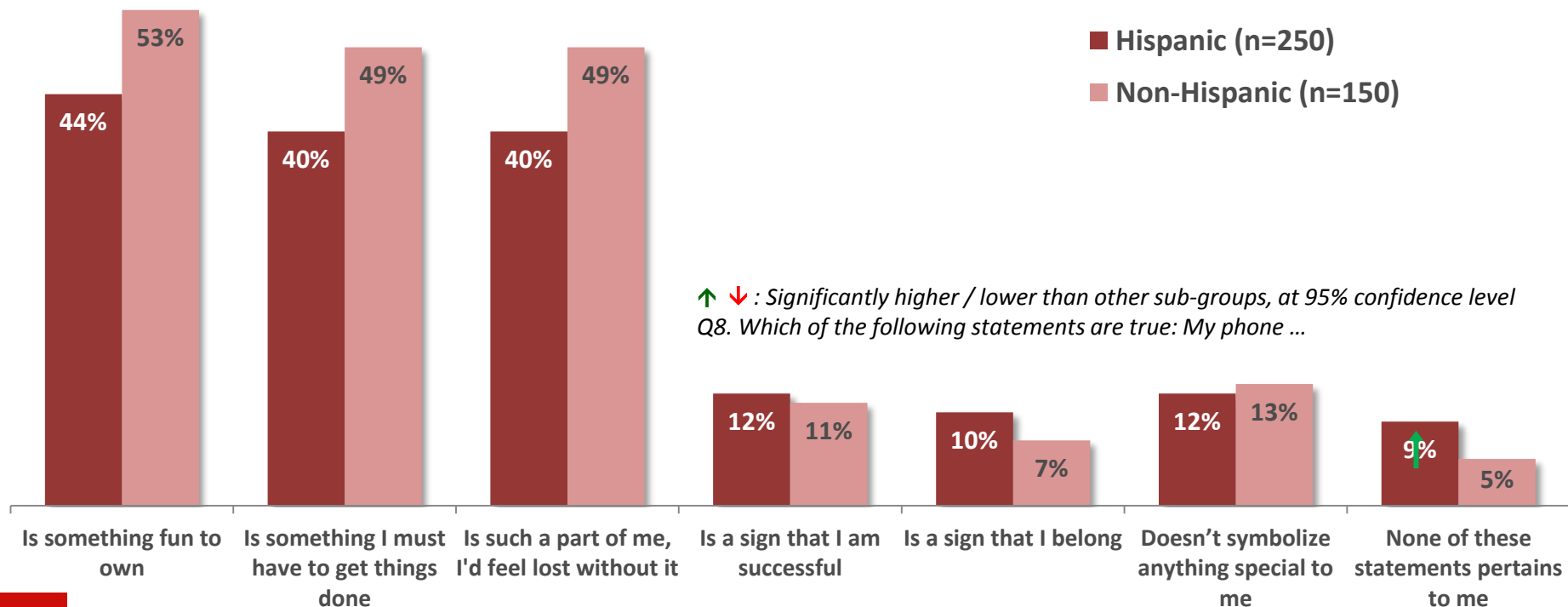


Relationship with their Smartphone

(% who endorse each statement)

Non-Hispanic Millennials self-report a stronger connection and emotional attachment to their smartphones than Hispanic Millennials, consciously choosing that it's something they need to get things done and feeling more lost without it.

Few Millennials (Hispanic or Non-Hispanic) self-report that their phone is a sign that they're successful or a sign that they belong.



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Who is their Wireless Carrier?

Wireless carrier subscribed to does not differ significantly by age, ethnicity, or language.

	TOTAL MILLENNIALS			ETHNICITY & LANGUAGE		
	18-20 Year Olds (118)	21-25 Year Olds (140)	26-30 Year Olds (142)	Hispanic: Spanish Preferred (125)	Hispanic: English Preferred (125)	Non- Hispanic (150)
	A	B	C	F	G	H
AT&T	25%	19%	25%	25%	22%	22%
Verizon	19%	21%	20%	19%	19%	22%
T-Mobile	16%	19%	16%	19%	14%	18%
Sprint	12%	14%	18%	18%	15%	11%
NET: Boost Mobile/Cricket/Metro PCS/US Cellular/Virgin Mobile and Other	27%	27%	21%	19%	29%	27%
MetroPCS	14%	16%	11%	13%	14%	14%
Boost Mobile	6%	6%	5%	3%	8%	5%
Virgin Mobile	3%	1%	1%	2%	2%	3%
Cricket	1%	1%	0%	0%	0%	1%
US Cellular	1%	0%	0%	0%	0%	1%
Other	3%	4%	4%	2%	6%	3%

Upper case letters indicate significance at the 95% level.

Q6a. Who is your current wireless carrier?

Hispanic Millennials and Mobile

What Type of Smartphone Do They Have?

Although there are no significant differences in smartphone type by age, ethnicity and language, Android usage does increase slightly with age and iPhone use slightly decreases.

	TOTAL MILLENNIALS			ETHNICITY & LANGUAGE		
	18-20 Year Olds (118)	21-25 Year Olds (140)	26-30 Year Olds (142)	Hispanic: Spanish Preferred (125)	Hispanic: English Preferred (125)	Non- Hispanic (150)
	A	B	C	F	G	H
Android	53%	57%	63%	53%	58%	62%
iPhone (iOS)	39%	36%	33%	43%	33%	33%
Windows	3%	2%	3%	3%	3%	2%
Blackberry	1%	1%	0%	1%	0%	1%
Other	3%	4%	1%	0%	6%	3%

Upper case letters indicate significance at the 95% level.

Q6b. What type of smartphone are you using?

Relationship with their Smartphone

(% who endorse each statement)

- Emotional attachments to smartphones are weakest among Hispanic: Spanish Dominant Millennials.
- The youngest Millennials (18-20 year olds) get the greatest enjoyment out of their phones.
- Older Millennials (26-30 year olds) are more likely than others to consider their smartphone as a status symbol.
- Although at relatively low levels, Android users are more likely than iPhone users to think of their smartphone as a sign that they're successful (14% vs. 8%, respectively).

	TOTAL MILLENNIALS			ETHNICITY & LANGUAGE		
	18-20 Year Olds (118) A	21-25 Year Olds (140) B	26-30 Year Olds (142) C	Hispanic: Spanish Preferred (125) F	Hispanic: English Preferred (125) G	Non- Hispanic (150) H
Is something fun to own	54% B	41%	48%	42%	47%	53%
Is something I must have to get things done	40%	46%	43%	38%	42%	49% F
Is such a part of me, I'd feel lost without it	45%	41%	44%	34%	46%	49% F
Is a sign that I am successful	8%	10%	16% A	14%	10%	11%
Is a sign that I belong	6%	11%	8%	13%	6%	7%
Doesn't symbolize anything special to me	12%	14%	11%	14%	9%	13%
None of these statements pertains to me	8%	9%	6%	9%	10%	5%

Upper case letters indicate significance at the 95% level.

Q8. Which of the following statements are true: My phone ...

Most Often for Communicating with *Family*

Methods for communicating with family do not differ significantly by age, place, or ethnicity & language; although a preference for texting slightly decreases with age while other methods increase (including Facebook and email). The reverse is true with language choice: the more respondents choose English for the survey, the more likely they are to prefer texting to their family.

	TOTAL MILLENNIALS			ETHNICITY & LANGUAGE		
	18-20 Year Olds (118) A	21-25 Year Olds (140) B	26-30 Year Olds (142) C	Hispanic: Spanish Preferred (125) F	Hispanic: English Preferred (125) G	Non- Hispanic (150) H
Text	49%	44%	38%	38%	46%	47%
Voice phone calls	19%	25%	21%	18%	22%	25%
Facebook or other social messaging option	8%	11%	15%	10%	13%	13%
Skype or other Internet voice chat service	3%	3%	7%	6%	3%	4%
Email	1%	4%	5% A	7% G	1%	3%
FaceTime or other Internet video chat service	5%	3%	2%	4%	5%	1%
Other apps	3%	2%	4%	5%	1%	3%
International calling options	2%	3%	3%	5%	2%	1%
Instagram or other photo-sharing site	4%	1%	1%	2%	2%	2%
Other	6%	4%	4%	6%	6%	2%

Upper case letters indicate significance at the 95% level.

Q14. Which do you use most when communicating with family?

Most Often for Communicating with *Friends*

- The youngest Millennials (18-20 year olds) are the most likely to prefer texting. This preference decreases with age.
- The eldest Millennials (26-30 year olds) are more likely to prefer communicating via Facebook or other social media messaging options than younger Millennials. The same is true for Hispanic: Spanish Preferred respondents.

	TOTAL MILLENNIALS			ETHNICITY & LANGUAGE		
	18-20 Year Olds (118) A	21-25 Year Olds (140) B	26-30 Year Olds (142) C	Hispanic: Spanish Preferred (125) F	Hispanic: English Preferred (125) G	Non- Hispanic (150) H
Text	64% C	60%	49%	51%	58%	62%
Facebook or other social messaging option	11%	16%	25% A	22% H	21%	12%
Voice phone calls	6%	8%	9%	5%	9%	9%
Instagram or other photo-sharing site	3%	4%	5%	6%	5%	3%
FaceTime or other Internet video chat service	3%	2%	4%	4%	2%	3%
Skype or other Internet voice chat service	3%	2%	1%	2%	0%	4%
Other apps	3%	2%	1%	2%	2%	2%
Email	2%	1%	1%	2%	1%	1%
International calling options	2%	1%	1%	1%	1%	2%
Other	3%	2%	4%	6%	2%	1%

Upper case letters indicate significance at the 95% level.

Q15. Which do you use most when communicating with friends?

Hispanic Millennials and Mobile

Voice Calls Preference Over Other Methods

- Hispanic Millennials who prefer English are most likely to prefer communicating with their grandparents via a voice call.
- Mid-aged Millennials (21-25 year olds) are most likely to prefer communicating with their boss via a voice call.
- Older Millennials are significantly more likely than younger Millennials to prefer not talking on the phone.

	TOTAL MILLENNIALS			ETHNICITY & LANGUAGE		
	18-20 Year Olds (118) A	21-25 Year Olds (140) B	26-30 Year Olds (142) C	Hispanic: Spanish Preferred (125) F	Hispanic: English Preferred (125) G	Non- Hispanic (150) H
Mom	81%	80%	73%	79%	78%	77%
Dad	58%	48%	53%	57%	51%	50%
Close friends	63%	54%	51%	46%	51%	67% FG
Other family members	40%	41%	42%	47%	39%	37%
Grandparents	26%	23%	24%	19%	31% F	23%
Acquaintances	16%	18%	15%	18%	17%	15%
Your boss	8%	19% AC	10%	7%	13%	17% F
I'd prefer not to talk to anyone on the phone	3%	6%	11% A	9%	6%	5%

Upper case letters indicate significance at the 95% level.

Q7. Select the top three people you prefer to communicate with via voice calls versus other methods (email)

Communication Method by Message or Topic

- Non-Hispanic Millennials are more likely to text when they want to share something funny or interesting, or when they want to tell someone they're running late. They also use voice calls more often to say they're sorry and to offer condolences.
- Hispanic Millennials are less likely to use texting and voice calls for the activities mentioned above, but they are more likely to talk to someone in person when they want to share something funny or interesting, or when sharing news of an engagement.

	Arrange a time to get together		Tell someone I'm running late		Read or experienced something funny or interesting		Got engaged to be married		Say "I'm sorry"		Offer condolences and / or sympathy	
	Hispanic (250)	Non-Hispanic (150)	Hispanic (250)	Non-Hispanic (150)	Hispanic (250)	Non-Hispanic (150)	Hispanic (250)	Non-Hispanic (150)	Hispanic (250)	Non-Hispanic (150)	Hispanic (250)	Non-Hispanic (150)
	E	F	G	H	A	B	C	D	I	J	K	L
Text	59%	64%	60%	69% G	40%	51% A	17%	19%	41%	40%	29% L	21%
Social Post	5%	4%	4% H	1%	24%	25%	11%	19% C	2%	1%	6% L	3%
Voice Call	13%	17%	22%	19%	10%	11%	16%	25%	15%	29% I	20%	34% K
Do it in person	5%	5%	3%	2%	10% B	4%	38% D	27%	26%	22%	28%	30%
Email	8% F	4%	2%	5%	8% B	3%	7% D	3%	6% J	3%	6% L	3%
Chat	6%	5%	6% H	1%	4%	3%	4%	4%	6%	3%	5%	6%
Not applicable	3% F	1%	2%	3%	4%	3%	6%	3%	4%	2%	5%	3%

Upper case letters indicate significance at the 95% level.

Q16. When each of the following happens, how do you communicate with those closest to you?

Attachment to Mobile Phones

% who endorse each statement as “true”

	TOTAL MILLENNIALS			ETHNICITY & LANGUAGE		
	18-20 Year Olds (118) A	21-25 Year Olds (140) B	26-30 Year Olds (142) C	Hispanic: Spanish Preferred (125) F	Hispanic: English Preferred (125) G	Non- Hispanic (150) H
ATTACHMENT						
I am more attached to the content of my phone (photos, music, contacts, etc.) than I am the device itself	31%	42%	32%	26%	40% F	39% F
I am more attached to my phone and its capabilities than I am of the content (photos, music, contacts, etc.)	24%	19%	25%	28% H	22%	18%
HOLDING ON		Total: 204			Total: 202	
I have at least one old mobile phone that I keep as a backup	28%	29%	21%	20%	26%	30%
I have at least one old cracked smartphone that I keep because it was extra durable	13%	20% C	10%	16%	14%	13%
I have at least one old smartphone that I keep because it reminds me of a certain time or event in my life	14%	13%	6%	8%	10%	13%
LETTING GO						
I gave away an old mobile phone, at least once	24%	24%	27%	18%	26%	29% F
I sold an old mobile phone, at least once	20%	28%	24%	20%	24%	28%
None of these are true for me	18% B	8%	11%	15%	14%	8%

*Upper case letters indicate significance at the 95% level.
Q13. Which of the following statements are true for you?*

Hispanic Millennials and Mobile

General Mobile Attitudes & Behaviors

% who endorse each statement as “true”

	TOTAL MILLENNIALS			ETHNICITY & LANGUAGE		
	18-20 Year Olds (118) A	21-25 Year Olds (140) B	26-30 Year Olds (142) C	Hispanic: Spanish Preferred (125) F	Hispanic: English Preferred (125) G	Non- Hispanic (150) H
HOW COMMUNICATION METHOD IS CHOSEN						
I choose a communication method depending on the person I need to reach	36%	46%	42%	26%	50% F	48% F
I choose a communication method depending on the topic/information	24%	33%	30%	20%	32% F	35% F
I choose a communication method according to how much money it will cost me	8%	8%	3%	5%	6%	7%
ATTITUDES TO TEXTING & SOCIAL MEDIA						
Texting is the easiest way to communicate	51%	48%	47%	42%	50%	53%
I like social media because I can reach friends and family all at once	34%	36%	45%	34%	42%	40%
ATTITUDES TO VOICE CALLS						
I think there is tremendous value to hearing someone’s voice	29%	32%	26%	22%	34% F	31%
I wouldn’t mind giving up voice calls, as long as I can keep text and data	30%	28%	20%	20%	28%	29%
Unplanned phone calls are rude and intrusive	8%	14%	18% A	15%	15%	11%
Phone calls and voicemail seem out-dated	4%	6%	5%	5%	5%	6%

Upper case letters indicate significance at the 95% level.
Q17. Which of these statements do you feel is true for you?

Hispanic Millennials and Mobile

Influencers over Wireless Carrier Choice

- Parental influence is strongest among young Millennials (18-20 year olds), while the eldest Millennials (26-30 year olds) are more likely to claim that they were influenced by their spouse's carrier.

	TOTAL MILLENNIALS			ETHNICITY & LANGUAGE		
	18-20 Year Olds (118) A	21-25 Year Olds (140) B	26-30 Year Olds (142) C	Hispanic: Spanish Preferred (125) F	Hispanic: English Preferred (125) G	Non- Hispanic (150) H
Consumer and technology reviews	26%	33%	29%	29%	31%	29%
Ads and commercials	25%	21%	16%	23%	21%	17%
Wanting to be on same plan as my parent's carrier	25% C	18%	14%	15%	17%	23%
Wanting to be on same plan with my spouse	9%	14%	21% A	22% G	11%	13%
Sales person	6%	16% A	13%	15%	9%	11%
Wanting to have same carrier as friends	14%	10%	11%	10%	12%	12%
Wanting to have same carrier as boyfriend or girlfriend	11%	6%	9%	11%	8%	7%
None of the above	25%	24%	27%	17%	32% F	27% F

Upper case letters indicate significance at the 95% level.

Q9. Which of the following have ever influenced your choice of a wireless carrier?

Hispanic Millennials and Mobile

Viewing Advertising on Smartphones

Older Millennials (26-30 year olds) and Hispanic Millennials who prefer Spanish are more likely than others to not mind seeing advertising on their phones, although across all segments the greatest proportion of respondents still claim that they tend to ignore such advertising.

	TOTAL MILLENNIALS			ETHNICITY & LANGUAGE		
	18-20 Year Olds (118) A	21-25 Year Olds (140) B	26-30 Year Olds (142) C	Hispanic: Spanish Preferred (125) F	Hispanic: English Preferred (125) G	Non- Hispanic (150) H
I tend to ignore all ads on my phone	37%	39%	34%	27%	42% F	40% F
I don't mind ads, as long as I can choose when to view them	25%	19%	25%	21%	26%	21%
I like seeing ads for new products or services, no matter what the ad is about	13%	11%	20% B	22% GH	13%	11%
I only want to see ads that pertain to things that are of direct interest to me	25%	31%	21%	30%	19%	28%

Upper case letters indicate significance at the 95% level.

Q10. Which one of these statements is most true for you when viewing ads on your phone?

Receiving Emails from Brands on Smartphones

- Hispanic: Spanish Preferred and Non-Hispanic Millennials are about twice as likely to not mind getting emails from many different brands compared to Hispanic: English Preferred Millennials.

	TOTAL MILLENNIALS			ETHNICITY & LANGUAGE		
	18-20 Year Olds (118)	21-25 Year Olds (140)	26-30 Year Olds (142)	Hispanic: Spanish Preferred (125)	Hispanic: English Preferred (125)	Non- Hispanic (150)
	A	B	C	F	G	H
I like to get emails from many different brands	19%	19%	20%	26% G	12%	21% G
I like emails only from brands that I opt into	31%	40%	31%	29%	38%	35%
I like emails from brands similar to those that I already follow	15%	9%	15%	15%	14%	10%
I don't want to get emails from any brands	35%	32%	33%	30%	35%	35%

Upper case letters indicate significance at the 95% level.

Q11. Which one of these statements is most true for you when receiving emails from brands on your phone?

Actions on Smartphones after Seeing an Ad

- Hispanic: Spanish Preferred Millennials are most likely to have followed a brand on social media after seeing an ad on a phone.
- Mid-range Millennials (21-25 year olds) are most likely to have shared that ad with other people via social media.

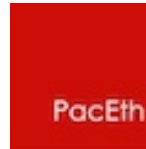
	TOTAL MILLENNIALS			ETHNICITY & LANGUAGE		
	18-20 Year Olds (118) A	21-25 Year Olds (140) B	26-30 Year Olds (142) C	Hispanic: Spanish Preferred (125) F	Hispanic: English Preferred (125) G	Non- Hispanic (150) H
Searched for more information about what was advertised	22%	26%	31%	30%	24%	25%
Clicked the ad for more information	21%	25%	27%	21%	25%	27%
Followed the brand on Facebook, Instagram, Twitter, or YouTube	19%	15%	19%	25% H	17%	12%
Taken a picture or captured a screenshot of the ad	17%	14%	9%	14%	15%	11%
Emailed, texted or made a note to myself about the ad to remind me about it	12%	15%	12%	13%	10%	16%
Shared the ad with other people via social media, texting, or email	8%	14% AC	13%	15%	10%	11%
Bought what was being advertised	6%	14%	6%	10%	6%	11%
Scanned a QR code for more information	4%	9%	9%	11% G	2%	9% G
None of these	39%	31%	31%	22%	38% F	39% F

Upper case letters indicate significance at the 95% level.

Q12. After seeing an ad on my phone I have...

Goals and Methods
Devices, Plans, & Budgets
Making Connections
Ads and Mobile
Family Affair
Emotions
Appendix: Quantitative Data
About Pacific Ethnography

About Pacific Ethnography



Pacific Ethnography: Anthropology & Design is a small international market and design research firm. We use anthropological methods, including ethnography, to help organizations understand consumers and design better products and services for them.

We strive for holism, methodological rigor, theoretical sophistication, teamwork, and trustworthy, useful results in the best tradition of applied anthropology. For anthropologists, everything is data. We use field methods like ethnography, background research, customer intercepts, long and short interviews, group interviews, observation, participant observation, and videography to generate insights and to find solutions.

Our multilingual crew of researchers, videographers, and project managers live and work in China, Brazil, India, and the USA, especially with hard-to-reach groups of people.

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Hispanic Millennials and Mobile

