



Intel Research: Global Innovation Barometer



Methodology

An quantitative online survey was conducted by Penn Schoen Berland in eight countries among a representative sample of 12,000 adults 18+ from July 28 to August 15, 2013.

	All	DEVELOPED				EMERGING			
	Global	US	Japan	France	Italy	Brazil	China	India	Indonesi
Sample Size	12002	1500	1500	1500	1501	1500	1500	1501	1500
Margin of Error	+/- 0.89	+/- 2.53	+/- 2.53	+/- 2.53	+/- 2.53	+/- 2.53	+/- 2.53	+/- 2.53	+/- 2.53

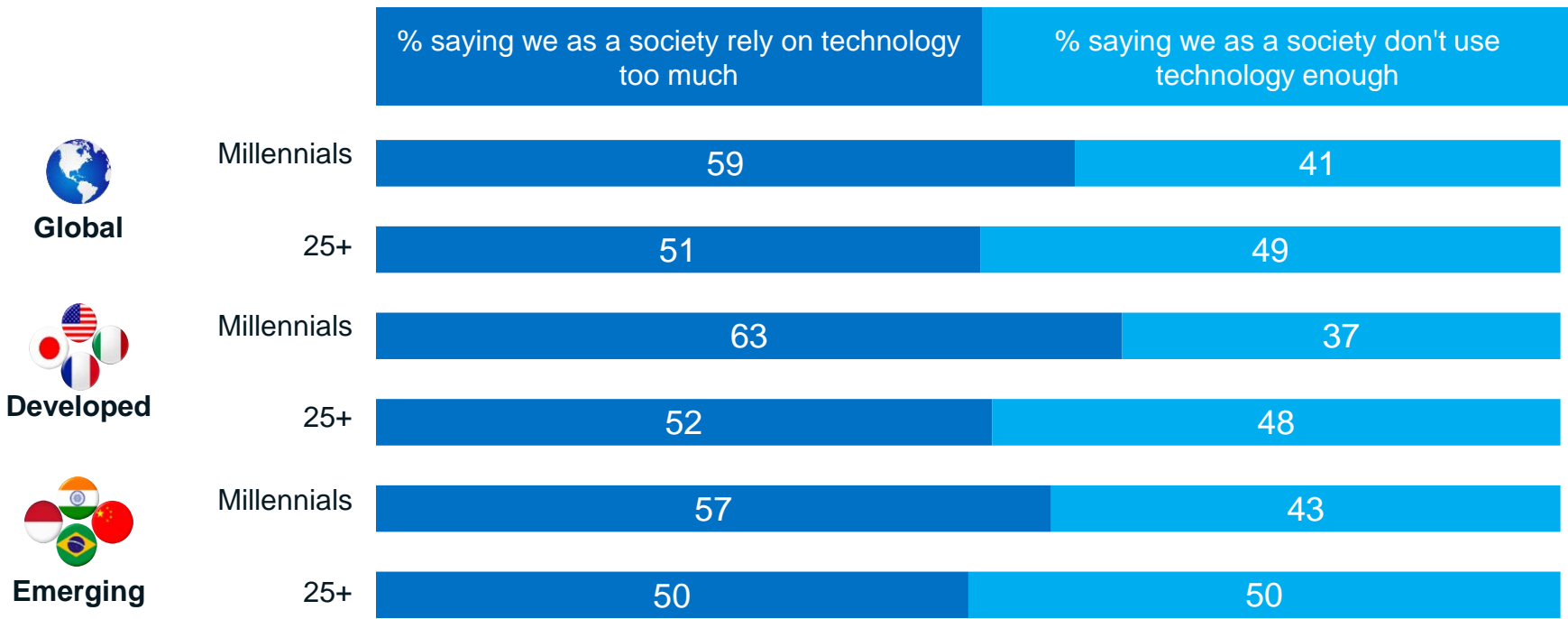
Millennial Highlights



Millennial Malaise About Technology?

Millennials (adults age 18-24) show a stark contrast to their reputation as digital natives, revealing a critical eye that will raise the bar for the value of innovation.

- 61% say technology makes us less human compared with 53% of adults 25+
- 63% say “in 10 years, there will be a technology , device or app that could do my job”



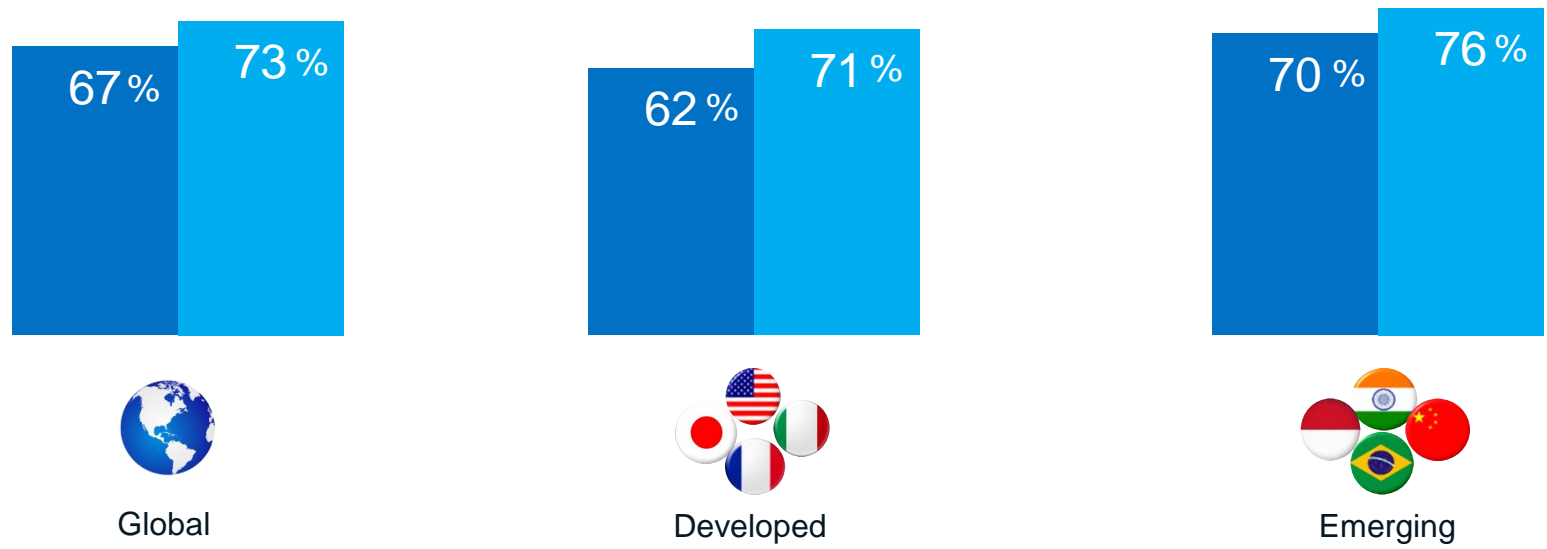
US millennials are particularly resistant, with 77% saying we rely on technology too much.



Millennial Malaise About Technology?

Millennials are also less likely to view technology innovation as central to their nations' well-being compared to those over 25.

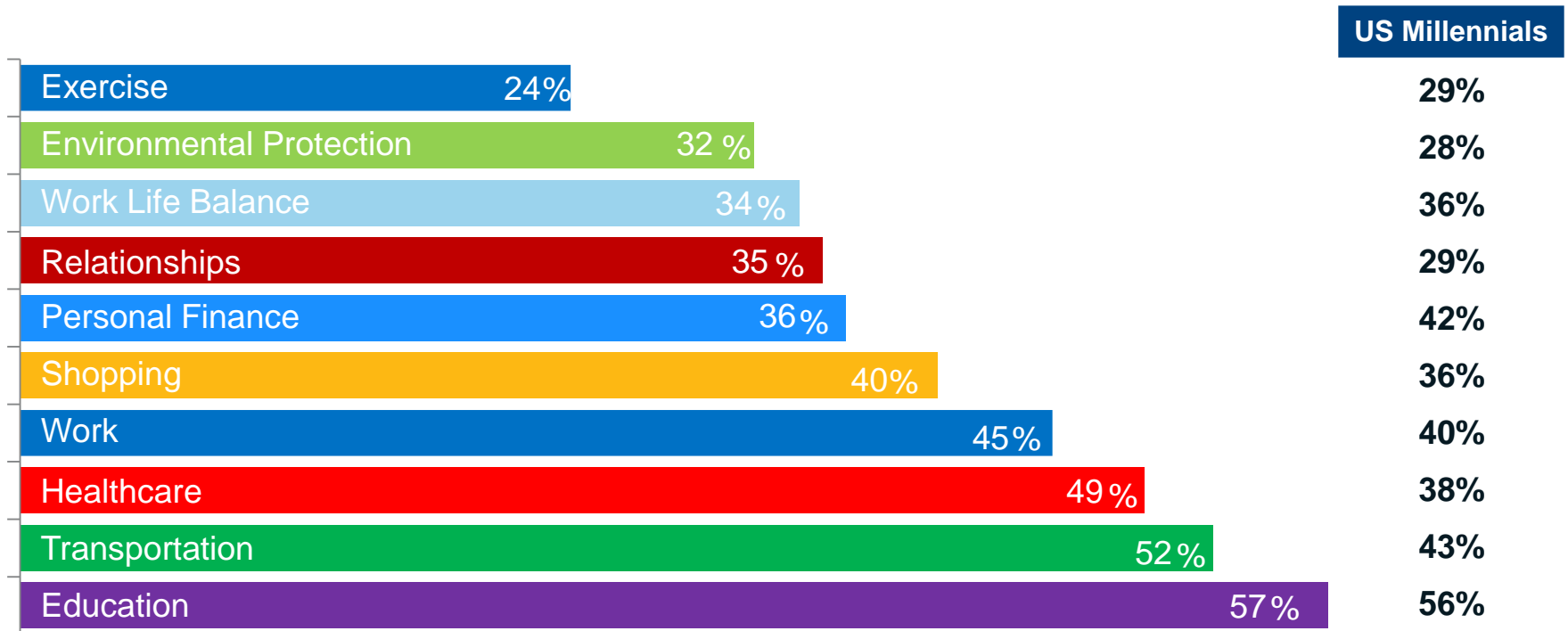
Technology innovation is a driving force of the nation's well-being



US millennials are on par with the global average at 72%.

Millennial Mandate: Raise the Bar

When asked what aspects of your life they think technology could improve, millennials are most confident around these areas of society.



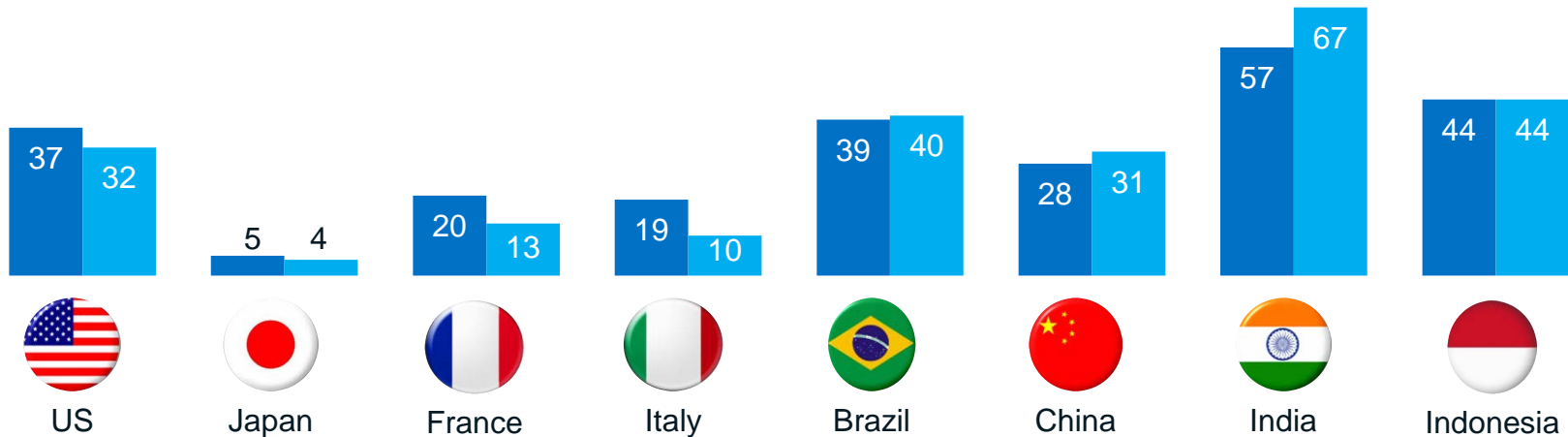
Millennials are notably less confident than those over 25 that technology can improve work-life balance and protect the environment.

Millennial Mandate: Raise the Bar

Millennials show high regard for the impact of technology on their personal lives, and a desire for innovations that understand and respond to them.

- 69% believe technology enhances their personal relationships
- 86% say that technology makes life simpler
- 36% worldwide and 46% in developed countries say that technology should learn about our personal preferences and behaviors

Despite being somewhat cynical, more millennials are very optimistic about the future of the tech in their countries compared to older respondents



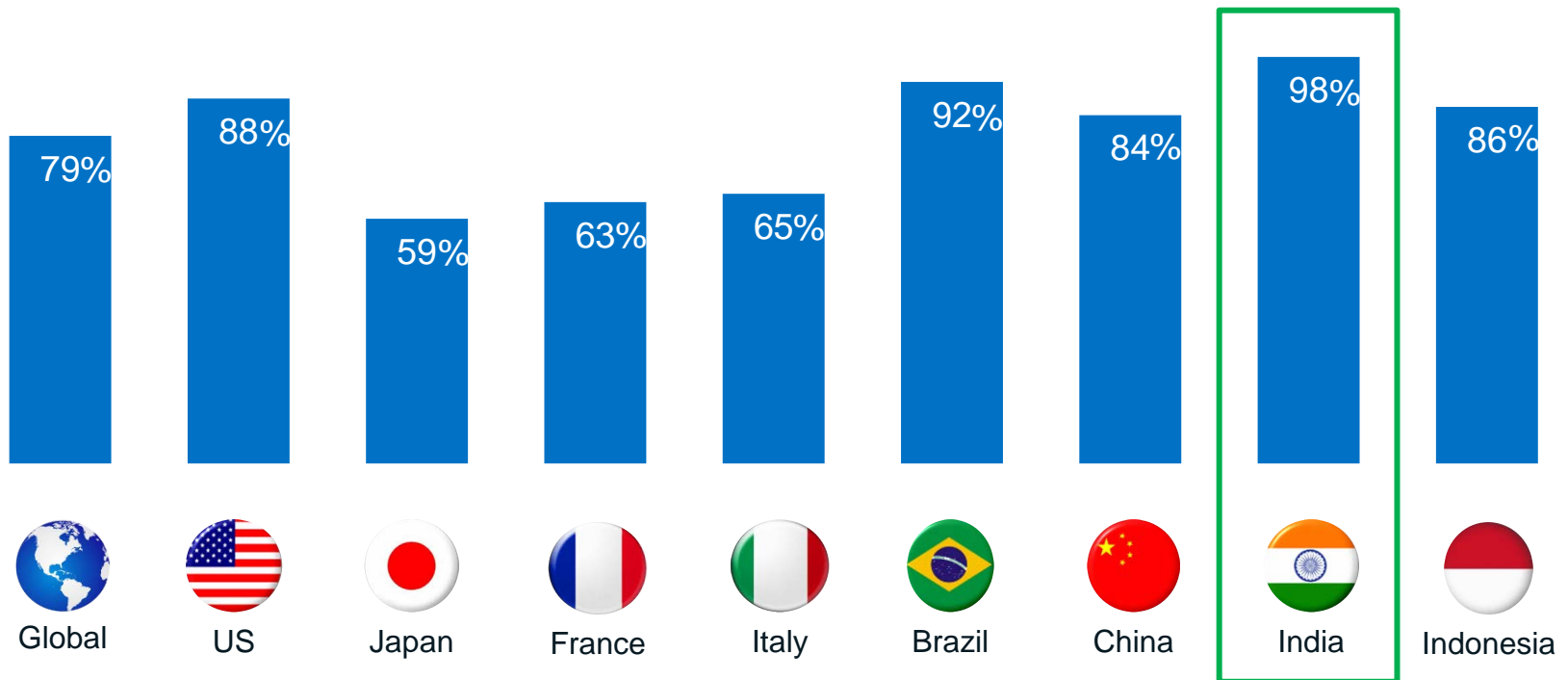
And they show a slightly higher willingness to share personal information for the sake of innovation.

Women and Emerging Markets

Optimism in Emerging Markets

Emerging markets are more optimistic about the future of the tech industry in their country than developed markets, except the U.S.

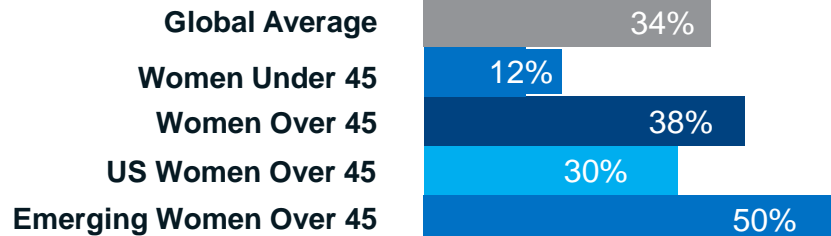
Percentage of people who are very and somewhat optimistic about the future of the tech industry in their country



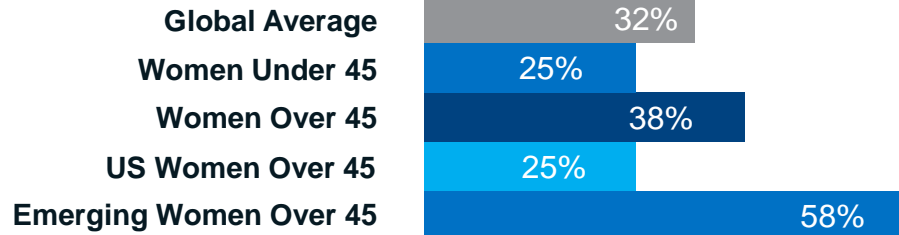
Older Women Carry the Tech Torch

Older women, particularly those living in emerging markets, are enthusiastic about the role of technology in their lives.

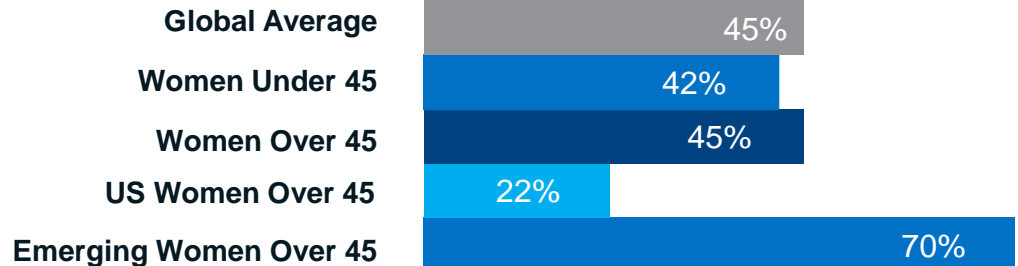
We as a society don't use technology enough



I think individuals benefit most from society



I believe that technology makes us more human

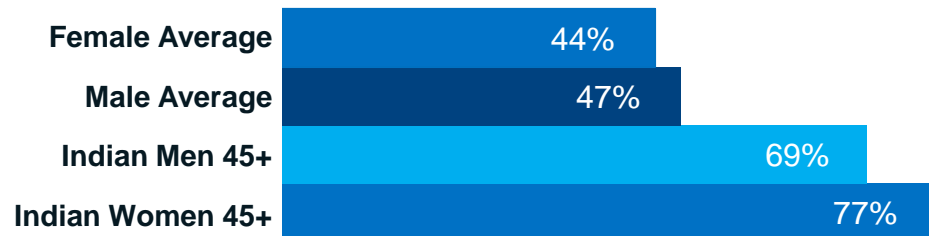


Profound Optimism in Indian Women 45+

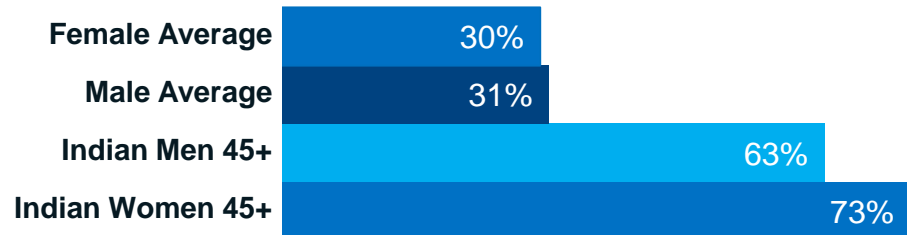
India is one of the only countries with highest optimism in the older population AND where older women's optimism is greater than older men's.

- Older Indian women are incredibly positive, and are twice as likely (27%) as the global average to see individuals as driving tech innovation

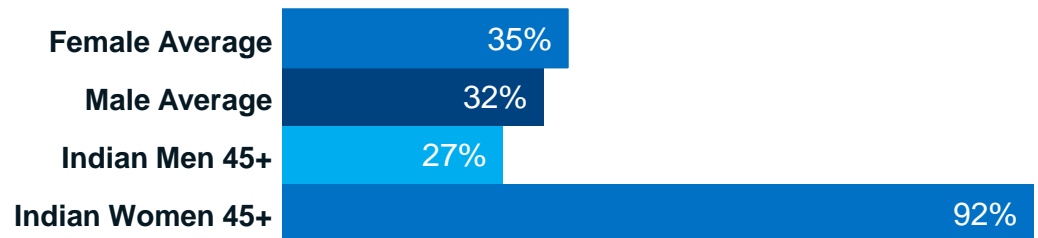
I believe that technology makes us more human



I am 'very optimistic' about the future of technology in my country



I like to keep up with technology advances and always have the newest devices

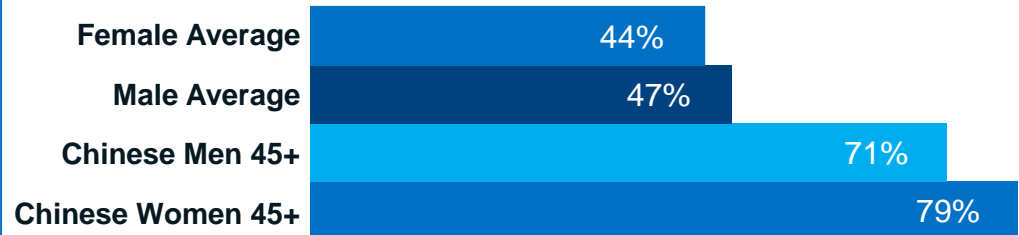


Profound Optimism in Chinese Women 45+

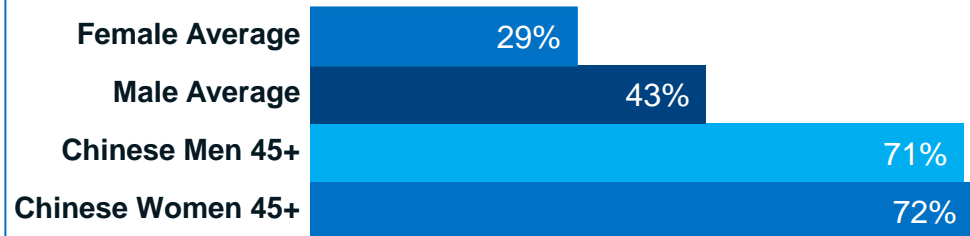
China is also highly optimistic among the older population AND older women's optimism is greater than older men's.

- Chinese women 45+ are 1.5 times as likely as the global average to see governments as the main beneficiary of tech innovation

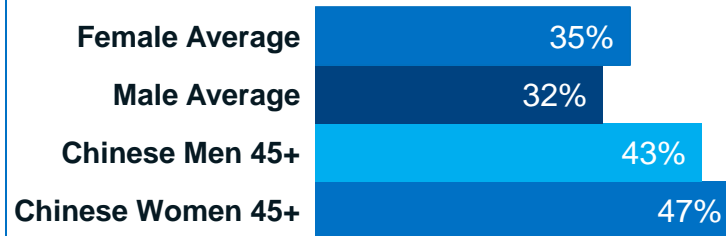
I believe that technology makes us more human



We as a society don't use technology enough

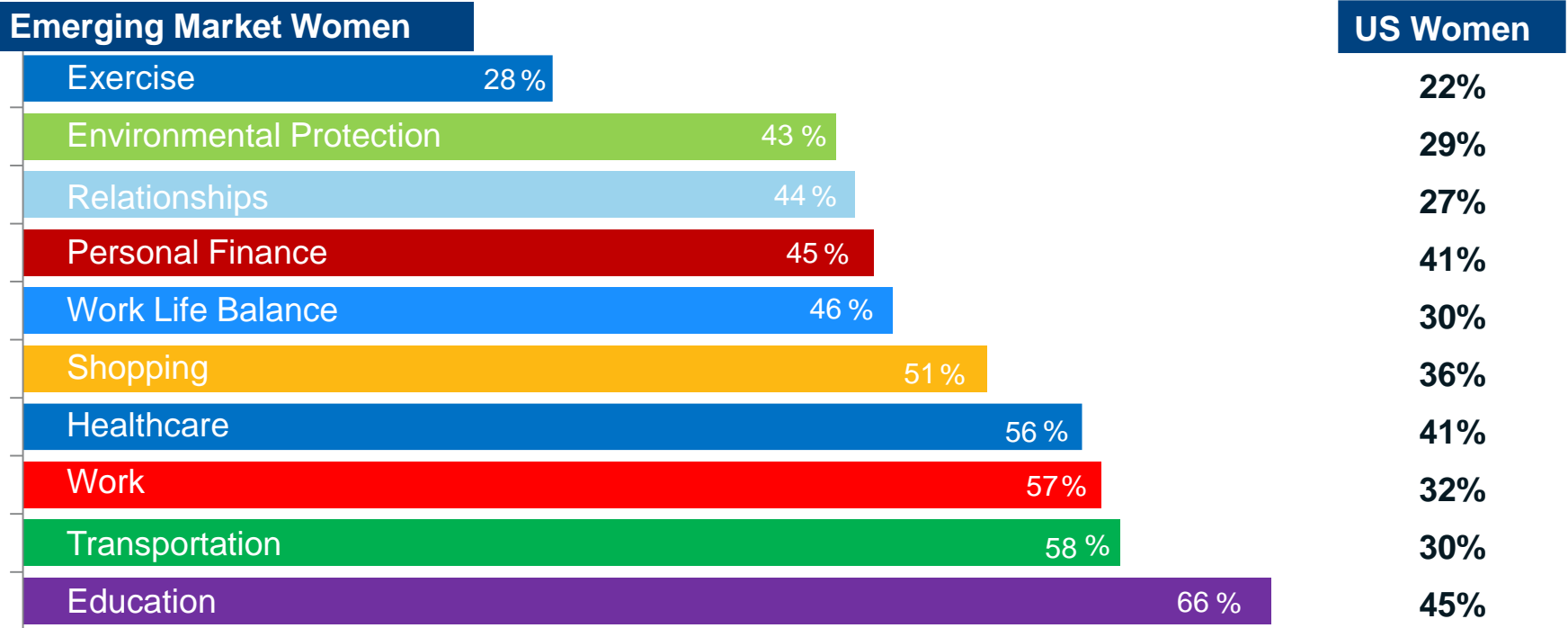


I like to keep up with technology advances and always have the newest devices



Profound Optimism in Emerging Markets

When asked what aspects of your life they think technology could improve, women in emerging markets are most confident around these areas of society.



Women in emerging markets are also more willing to embrace personal technologies to improve their experiences: software that watches their work habits (86%), students' study habits (88%) and even smart toilets that monitor their health (77%).

Data Sharing

Data Sharing Worldwide

When asked how likely are you to anonymously share the following type of information if it could lead to improvements or innovations in that technology, developed countries show a lower overall willingness to share their information.



% very + somewhat likely...	Global	US	Japan	France	Italy	Brazil	China	India	Indonesia
Gender	72	81	61	54	63	58	88	88	88
Travel patterns	67	55	47	67	45	69	88	83	76
Birth date	67	59	48	61	66	73	71	83	78
Education records	65	55	39	46	52	75	87	88	83
Emails	58	43	38	33	59	61	70	79	79
Purchase history	56	54	40	43	51	54	71	76	61
GPS records	50	40	33	39	43	49	57	74	61
Internet history	50	43	36	32	45	47	63	72	63
Genetic information	48	44	29	35	44	52	43	79	61
Health records	47	33	40	31	30	55	53	79	57
Medical records	45	31	39	31	32	50	49	77	56
Phone records	38	32	28	28	33	40	37	68	43
Banking information	30	20	24	20	19	26	28	60	42
Average Willingness	53	45	39	40	45	55	62	77	65
Bold = top choice per audience		Below the global average				Above the global average			

Affluent Data Altruists

Individuals with higher incomes show a greater willingness to share personal information, and typically have more exposure to technology and devices.

How likely are you to anonymously share the following type of information **if it could lead to improvements or innovations in that technology?**

	Net Willingness to Share (Very and Somewhat Likely)		
	Low income	Medium income	High income
Gender	71%	69%	79%
Birth date	67%	65%	71%
Education records	63%	62%	74%
Travel patterns	62%	65%	73%
Emails	56%	55%	65%
Purchase history	50%	55%	67%
Genetic information	46%	46%	56%
Internet history	46%	47%	59%
GPS records	44%	48%	59%
Health records	44%	45%	56%
Medical records	43%	42%	54%
Phone records	35%	36%	48%
Banking information	29%	27%	38%
Average Willingness to Share	50%	51%	61%

Affluent Data Altruists

The greatest increase in willingness to share information **for the sake of others** is seen in the types of information directly related to the benefit.

How much more likely would you be to share this information if you knew it could lead to technology innovation **that prolongs or improves someone's quality of life?**

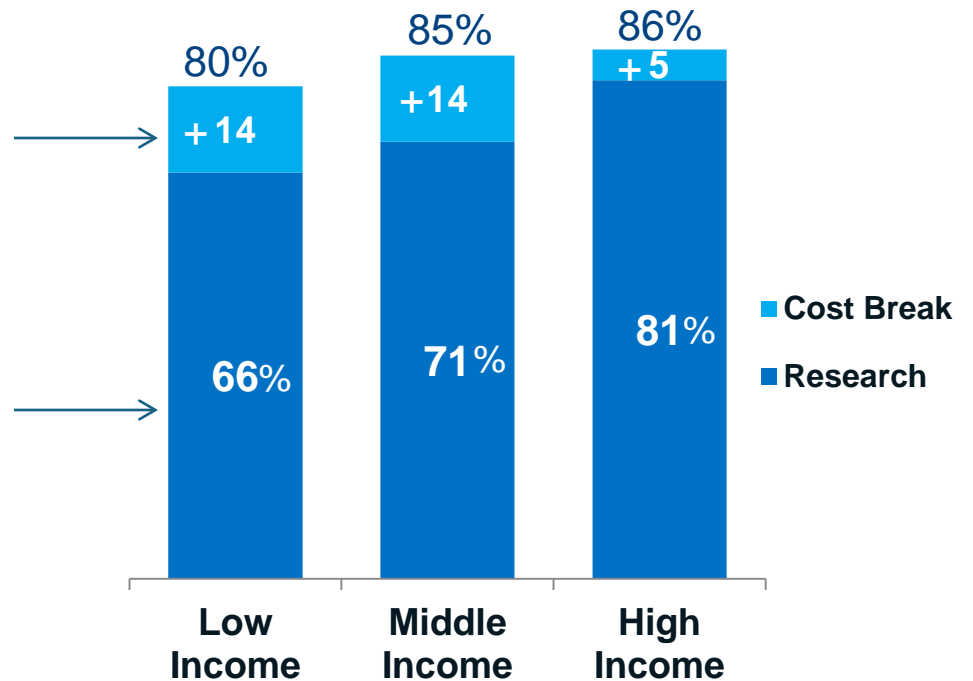
	Net Willingness to Share (Very and Somewhat Likely)			Increase Over The Sake of Innovation
	Low income	Medium income	High income	
Gender	71%	70%	78%	0%
Birth date	69%	68%	75%	3%
Education records	67%	67%	77%	4%
Travel patterns	65%	68%	76%	3%
Emails	61%	61%	69%	5%
Purchase history	57%	60%	70%	5%
Genetic information	58%	60%	68%	13%
Internet history	54%	56%	67%	8%
GPS records	55%	57%	67%	9%
Health records	59%	59%	68%	14%
Medical records	58%	59%	66%	15%
Phone records	45%	49%	59%	11%
Banking information	39%	38%	49%	11%
Average Willingness to Share	58%	59%	68%	

Affluent Data Altruists

Across income levels, cost benefits seem to be the stronger incentive to share than contributing to research.

Would you be willing to anonymously share results of lab tests or health monitoring to contribute to databases for research **if you received a lower cost for medications?**

Would you be willing to anonymously share results of lab tests or health monitoring **to contribute to databases for research?**



People with higher incomes are also more willing (77%) than those with low income (63%) to let an application monitor their work habits to improve efficiency.