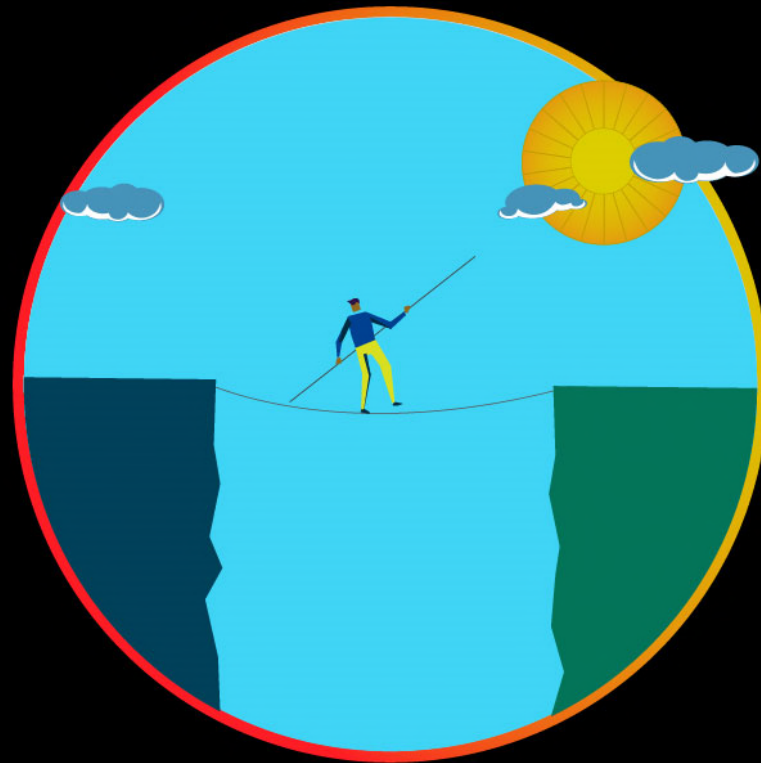


Deloitte.



2019 Deloitte Global Millennial Survey

A "generation disrupted"

Austria results

May 2019

Introduction

Deloitte Global's eighth annual Millennial Survey found that, facing continuous technological and societal disruption, millennials and Gen Zs are disillusioned with traditional institutions, skeptical of business's motives and pessimistic about economic and social progress. Despite global economic expansion and opportunity, younger generations are wary about the world and their place in it. But they remain hopeful and lean on their values as both consumers and employees.

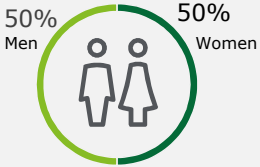
About Austria:

- 300 millennials surveyed
- Austrian millennials stand out from their global counterparts in a few key ways:
 - They are much less optimistic that the economic and political/social situations will improve in the next year
 - They are less inclined to believe business has a positive impact on society
 - They are less inclined to leave their current roles in the next two years, and are more inclined to stay beyond five years

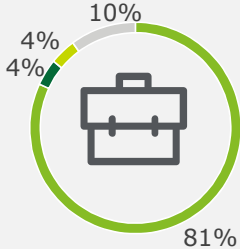
Sample profile

300 millennial interviews conducted in Austria

Gender

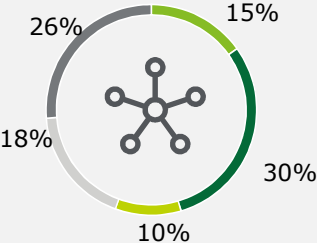


Working status



- Working full or part-time (less than 30 hours per week)
- Temporary / freelance
- In full time education
- Not working / in unpaid work

Organization size* (number of employees)

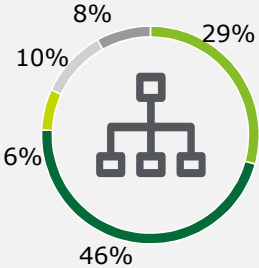


- 1-9
- 10-99
- 100-249
- 250-999
- 1,000+

Have children

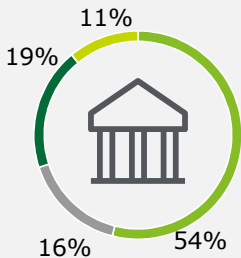


Job seniority/level*



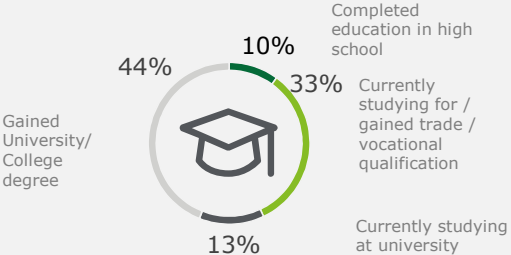
- Junior-level executive
- Mid-level executive
- Senior executive
- Head of department/division
- Senior management team/board

Organization type*



- Privately owned business
- Listed/publicly owned business
- State-owned or public-sector organization
- Not-for-profit organization/charity

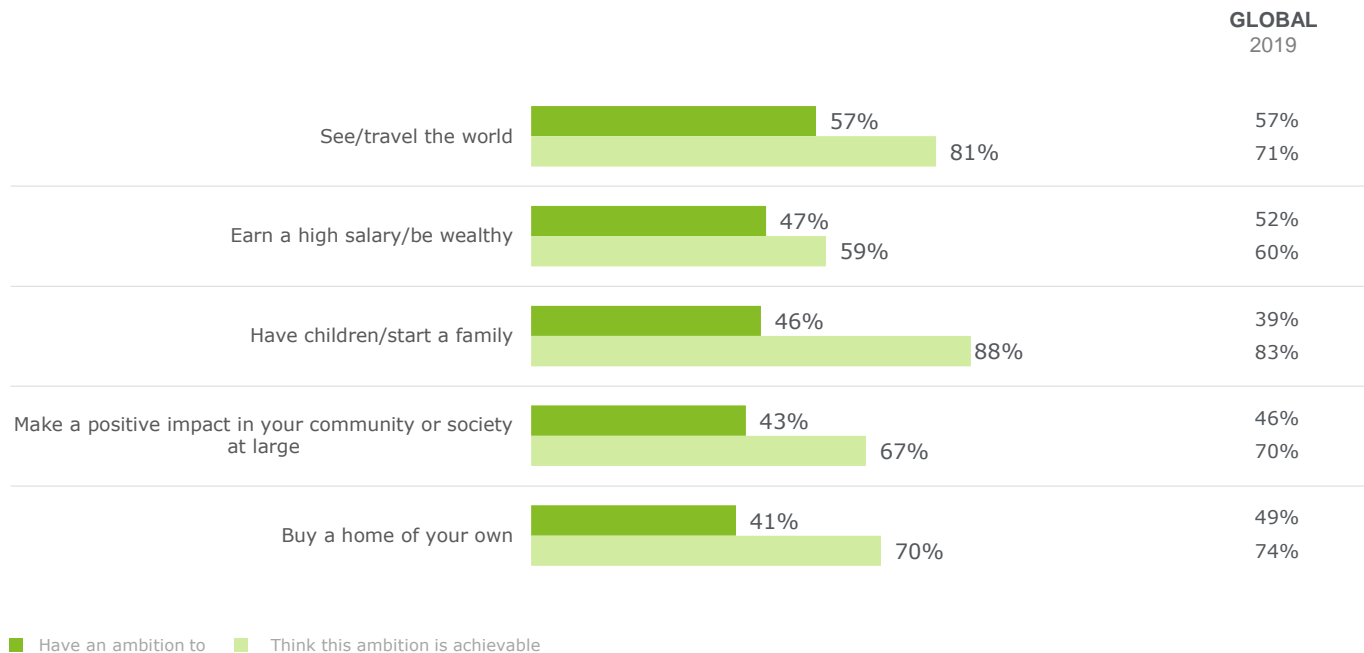
Education level



Altered aspirations

- Austrian millennials aspire to start families more than global respondents (Austria 46%, global 39%). They don't aspire to be wealthy or buy homes as much as global respondents.
- Austrian millennials are more satisfied with their lives nowadays as global respondents.

TOP 5 MILLENNIAL AMBITIONS



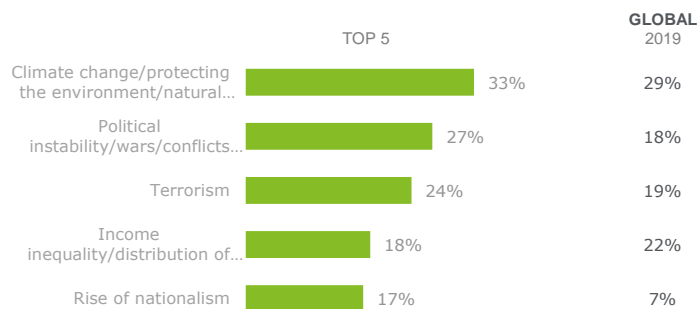
CLAIM THEY ARE 'SATISFIED' WITH THEIR LIFE NOWADAYS (8, 9 or 10 / 10)

36% **29%**
Austria Globally

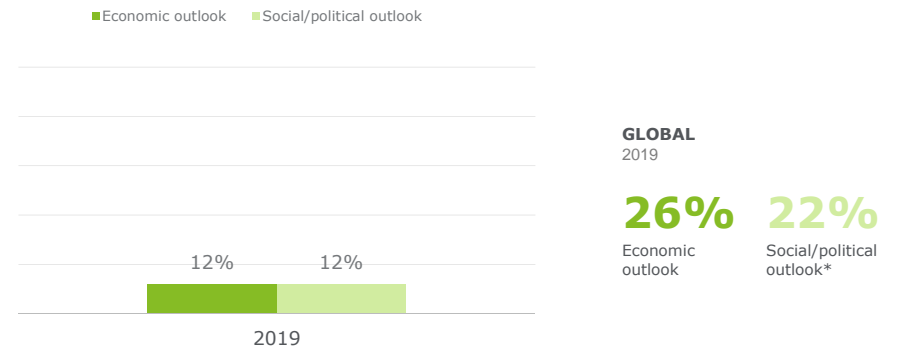
View of the world

- Austrian millennials are much less optimistic than global millennials that the economic and political/social situations will improve in the next year.
- They believe universities will be best able to solve the world's most-pressing challenges more than global respondents, and are less inclined to believe that government will.
- They are also more inclined to believe that there are no barriers to their reaching their career aspirations than global respondents.

% Millennials personally concerned about...



% Millennials who say that the ... situation in Austria 'will improve' in the next 12 months...

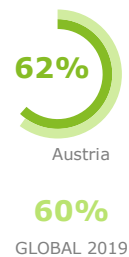


*Excludes China

% Millennials who think ... will be 'best able to solve the world's most pressing challenges'

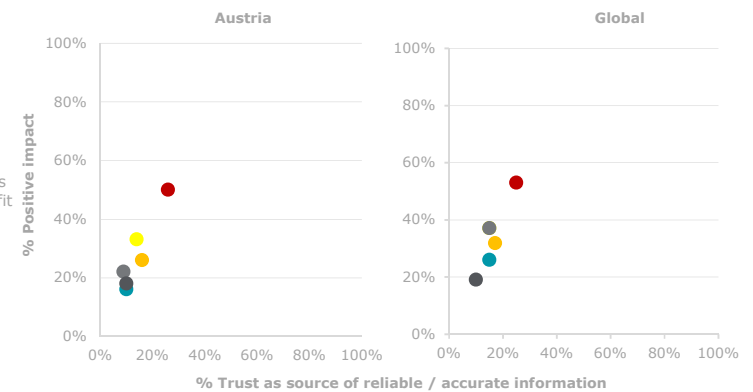
	Austria	Global
Universities/science and research institutes	27%	27%
Business	23%	20%
Government	21%	29%
Charities/NGOs	16%	13%

% Millennials who agree 'There are no barriers to prevent me from reaching my career ambitions'



% Millennials who say the following groups of people and organizations are having a 'positive impact' on the world, and can be trusted 'a lot' as sources of reliable/accurate information

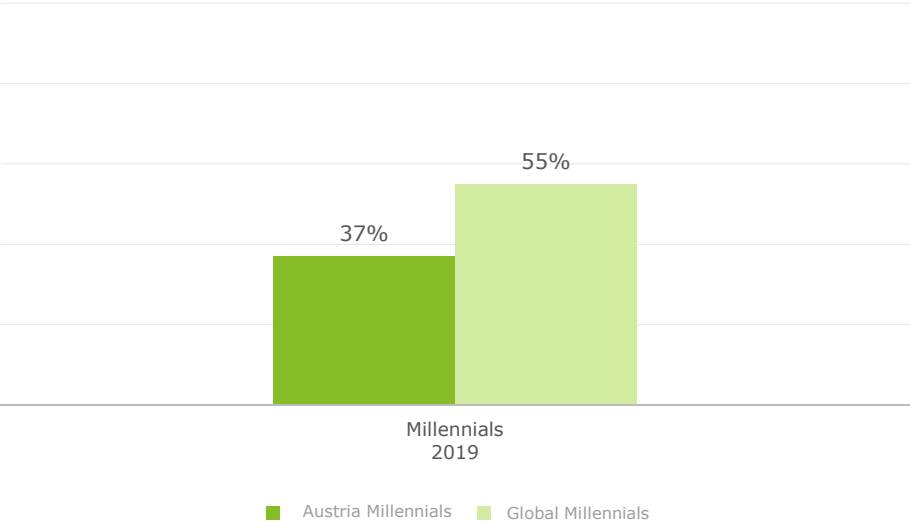
- Political leaders
- Religious/faith leaders
- Social media platforms
- Business leaders
- Traditional media / journalists
- Leaders of NGOs and not-for-profit organizations



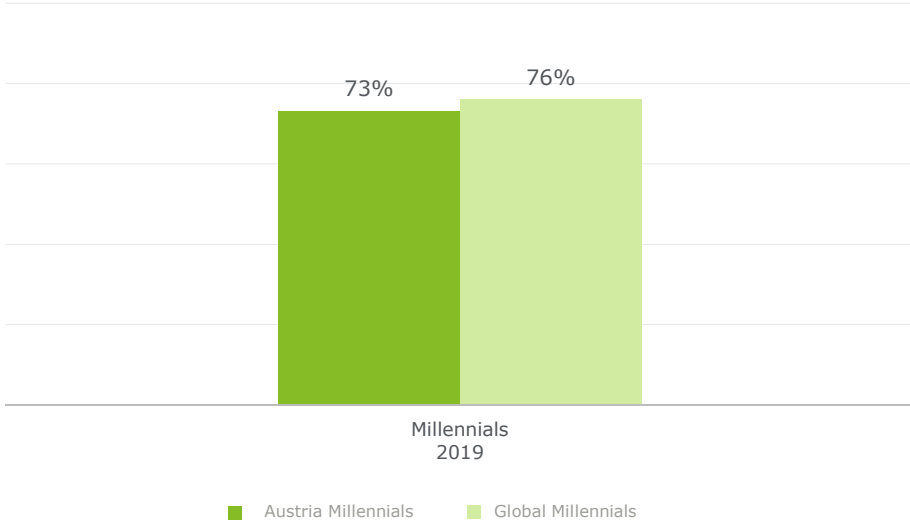
Millennials on business: The good, the bad, the ugly

- Austrian millennials are less inclined to believe business has a positive impact on society than global respondents.

% who say businesses in general have a positive impact on the wider society in which they operate



% agree that businesses 'focus on their own agendas rather than considering the wider society'



The impact of Industry 4.0

- Austrian millennials who are not currently employed are less inclined than Austrian millennials who have full or part time jobs to believe they have the skills necessary to succeed in the future.



■ Millennials in Austria
■ Millennials Globally

BELIEVE INDUSTRY 4.0 WILL MAKE IT HARDER TO GET OR CHANGE A JOB IN THE FUTURE

40%
46%

Millennials in Austria / Globally
who are employed full / part time

41%
45%

Millennials in Austria / Globally
who are not working or in unpaid work

BELIEVE THEY HAVE ALL / SOME OF REQUIRED SKILLS / KNOWLEDGE AS THE WORKING ENVIRONMENT IS SHAPED BY INDUSTRY 4.0

75%
81%

Millennials in Austria / Globally
who are employed full / part time

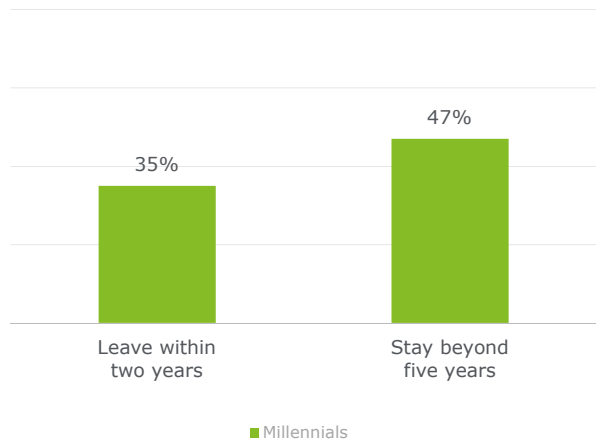
58%
65%

Millennials in Austria / Globally
who are not working or in unpaid work

Disrupted, but also disrupting

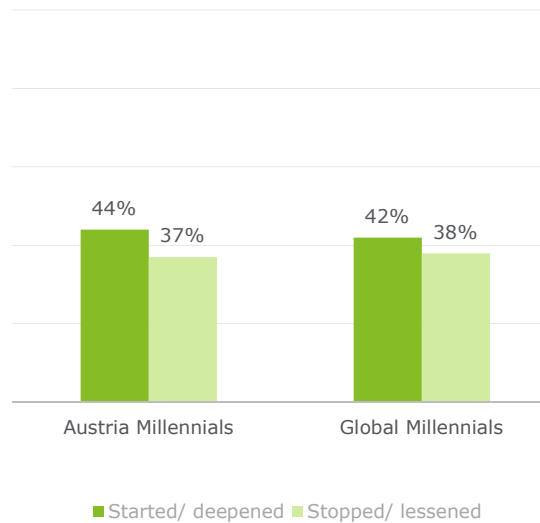
- Austrian millennials are less inclined to leave their current roles in the next two years (Austria 35%, global 49%), and are more inclined to stay beyond five years than global respondents (Austria 47%, global 28%).
- They are less inclined to consider joining the gig economy than their global counterparts (Austria 75%, global 84%).

% who expect to leave / stay with their current employer...

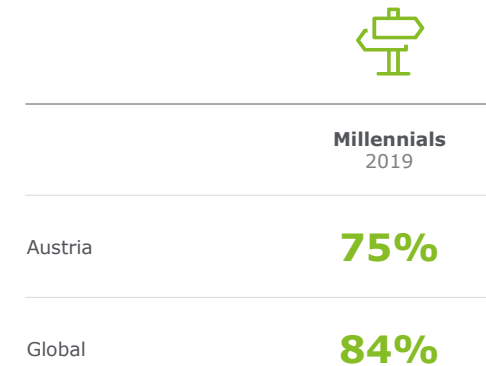


Global	Millennials
Leave in the next 2 years	49%
Stay beyond 5 years	28%

% who as a consumer have started/deepened and stopped/lessened a relationship with a business because its products or services positively / negatively impact the environment or society



% who would consider joining the gig economy



Q7. If you had a choice, how long would you stay with your current employer(s) before leaving to join a new organization or do something different?
 Q42. Would you consider joining the gig economy? Q20/21. As a consumer, have you ever started or deepened / stopped or lessened a relationship with a business because of the following: 'It has products/services that positively / negatively impact the environment/society'?
 2019 Base: All Millennials in Austria 319, Global 13,416
 2019 Base: All Millennials in work in Austria 258, Global 10,736

Social media: Friend or foe?

- Austrian millennials are less inclined than their global counterparts to say they'd be physically healthier if they stopped using social media, that they'd be a happier person if they reduced their time on social media, and they would be less anxious if they couldn't check social media for a day. However, they say they'd like to completely stop using social media more than global respondents.
- They are less concerned about personal data security and online fraud.

% Millennials who agree that...

I'd be **physically healthier** if I reduced the time I spend on social media



64%

I'd be a **happier person** if I reduced the time I spend on social media



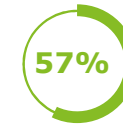
60%

I'd be **anxious** if I couldn't check social media or had to do without it for a day or two



44%

On balance, social media **does more harm than good**



55%

I'd like to **completely stop using** social media



41%

GLOBAL 2019

% Millennials concerned about...

	GLOBAL 2019
The way in which organizations obtain personal information	71%
Being the victim of online fraud	70%
The security of the personal data that businesses hold on you	66%
The security of the personal data that public bodies hold on you	66%

GLOBAL 2019

% Millennials agree...

	GLOBAL 2019
I feel I have no control over who has my personal data or how they use it	73%
To get the most from technology, we must be prepared to share some of our personal details	59%
The benefits of technology outweigh the risks associated with sharing my personal data	55%

GLOBAL 2019

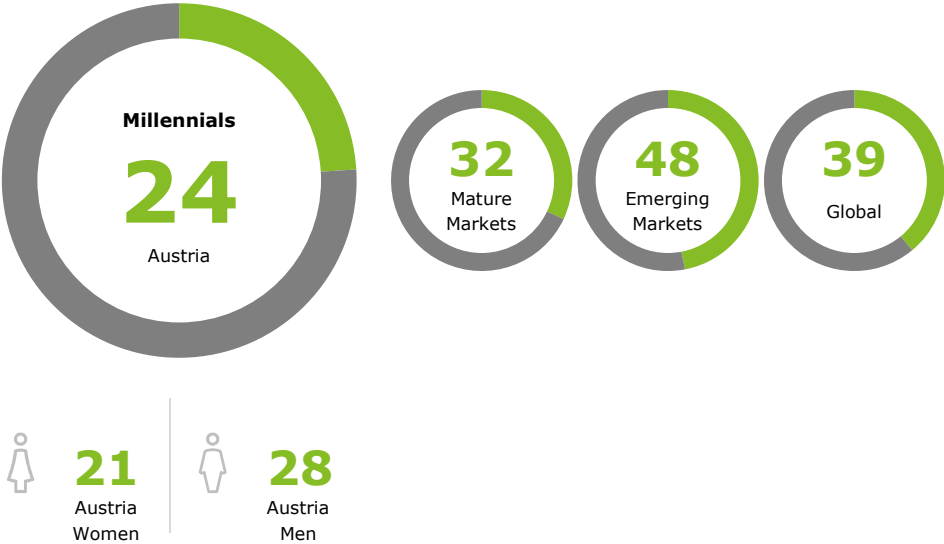
% Millennials who believe [institution] 'need to make more effort' to protect people's data and online security

	GLOBAL 2019
Social media platforms	61%
Government/regulators	56%
Tech companies	52%
Businesses who sell goods and services to people...	43%
Individuals	33%

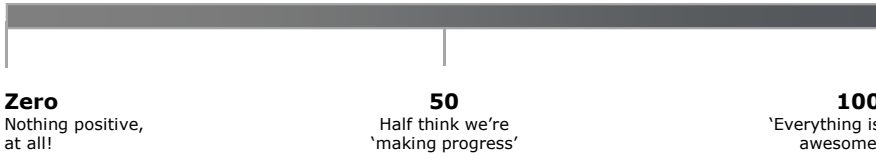
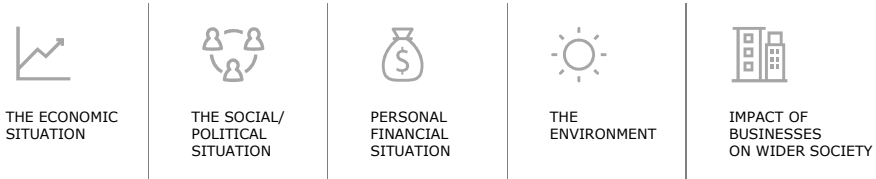
GLOBAL 2019

The MillZ Mood Monitor

- Austrian millennials, who scored 24, scored much lower on the mood index than their global counterpart at 39.



Scores are based on results from the following five question topics that are aggregated to create a measure of between zero and a hundred. This scale gives us the ability to compare not only year-to-year movement, but also regional and demographic groups within a given year





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