



The 2020 Deloitte Millennial Survey

Brazil

Global Summary

2020 Deloitte Millennial Survey

Our methodology:

In late 2019, for its ninth annual Millennial Survey, Deloitte surveyed **18.4k millennial and Gen Z respondents across 43 countries, including 513 respondents from Brazil**, to understand their views on a variety of topics—from their actions to make a positive impact in the world; to work and what they are looking for in a job and an employer; to the role of business in society; to the issue of mental health and stress; and more.

In early 2020, as the COVID-19 pandemic continued to unfold around the world, Deloitte fielded an additional “pulse” survey of **9,100 respondents across 13 countries, including 500 from Brazil** to supplement the original survey findings with insights about:

- How millennials and Gen Zs are responding to the pandemic;
- How it is impacting them, their jobs/workplace, and their views on businesses and governments; and
- The long-term implications the pandemic may have.

Key findings:



Mental health: Before the pandemic, close to half of the respondents said they were stressed all or most of the time. But anxiety levels fell eight points for both generations in the peak-pandemic pulse survey, indicating a potential silver lining to the disruption caused by the pandemic.



Finances: Many are financially prudent and literate, but three-fourths often worry about their financial situations either in the short or long term.



Environment: Prior to the pandemic, half of respondents said they believed it was too late to repair the damage caused by climate change. Yet, this figure dropped in the pulse survey, suggesting that the impact of the COVID-19 response on the environment has given hope there is still time to take action.



Sense of responsibility. Nearly three-fourths said the pandemic has made them more sympathetic toward the needs of others and that they will take actions to have a positive impact on their communities in the future.



Work & loyalty: Pre-pandemic, more millennials said they'd like to stay with their employers for at least five years than would prefer to leave within two, signaling employers may be better addressing their needs. It remains to be seen how loyalty will be affected by pandemic-driven job losses.



View of institutions: A majority of respondents gave businesses and governments high marks for their pandemic responses. Actions taken during the crisis, however, did not translate into overall better opinions of these institutions or their leaders.

Key

2020 Deloitte Millennial Survey

The following deck highlights how opinions in Brazil compare to the pre-pandemic survey and examines how Brazilian respondents compare to their counterparts surveyed after the onset of the coronavirus crisis. **In total, we surveyed 1,013 respondents in Brazil – 513 before the onset of coronavirus (312 millennials, 201 Gen Zs), and 500 after (300 millennials, 200 Gen Zs).**

Throughout this deck, you will see the following terms and definitions:



PRIMARY SURVEY: The original, pre-pandemic, survey of 43 countries that measured young people's attitudes in late 2019



PULSE SURVEY: The secondary survey of 13 of the original 43 countries distributed in early 2020 to understand attitudes after the onset of the pandemic



PRIMARY 43: The entire sample of 43 countries that participated in the original 2019 survey



PULSE 13: The thirteen countries that participated in the 2020 pulse survey



DARK GREEN: Millennials from Brazil (born 1983 – 1994) who participated in the primary survey



LIGHT GREEN: Millennials from the Pulse 13 countries (born 1983 – 1994) who participated in the pulse survey



DARK TEAL: Gen Zs from Brazil (born 1995 – 2003) who participated in the primary survey

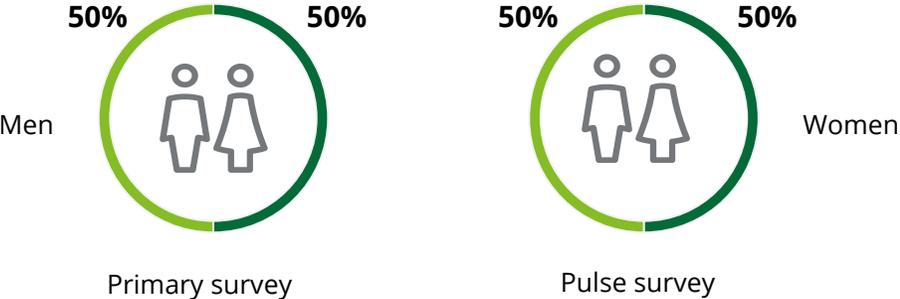


LIGHT TEAL: Gen Zs from the Pulse 13 countries (born 1995 – 2003) who participated in the pulse survey

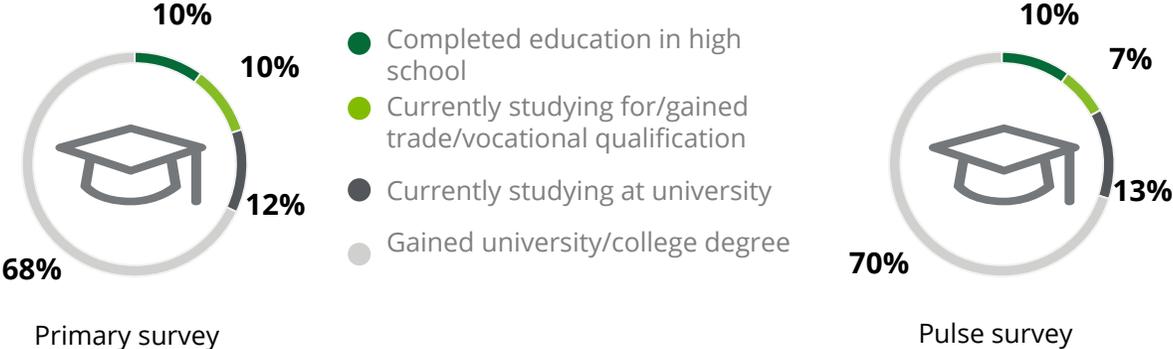
Sample profile (weighted)

612 Millennial interviews (312 Primary survey, 300 Pulse survey) conducted in the UK

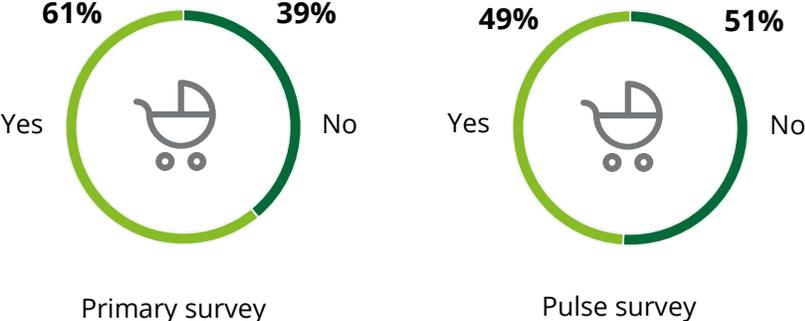
Gender



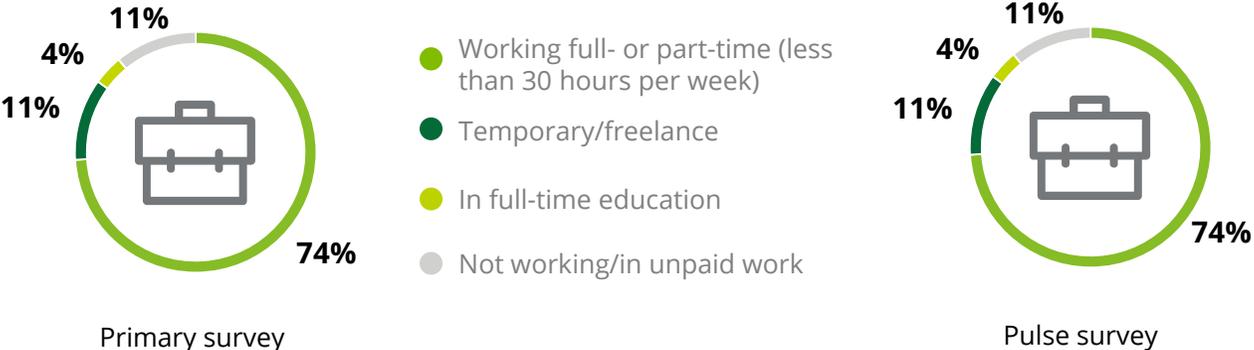
Education level



Have children



Working status



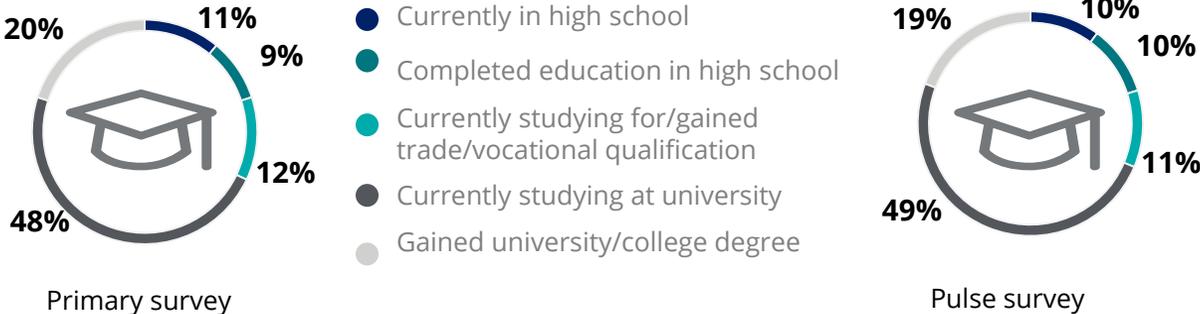
Sample profile (weighted)

401 Gen Z interviews (201 Primary survey, 200 Pulse survey) conducted in the UK

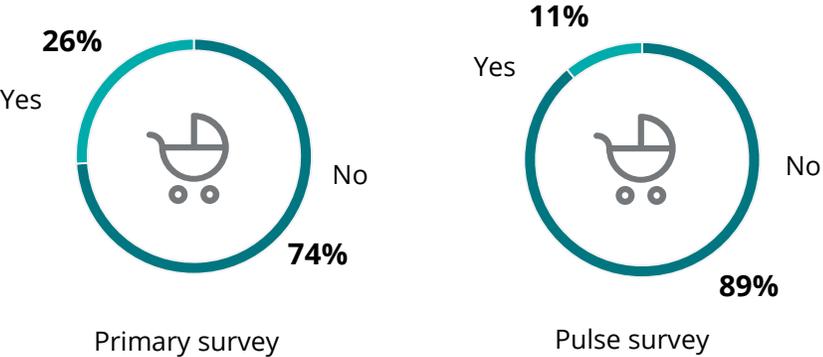
Gender



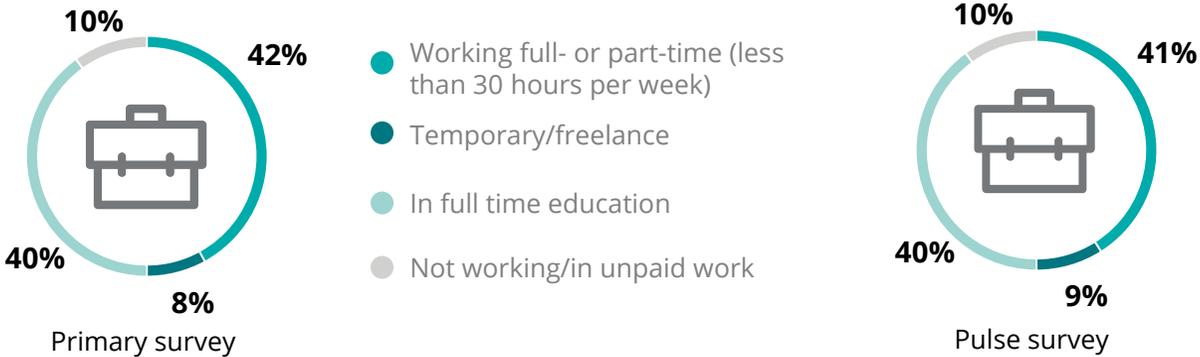
Education level



Have children



Working status



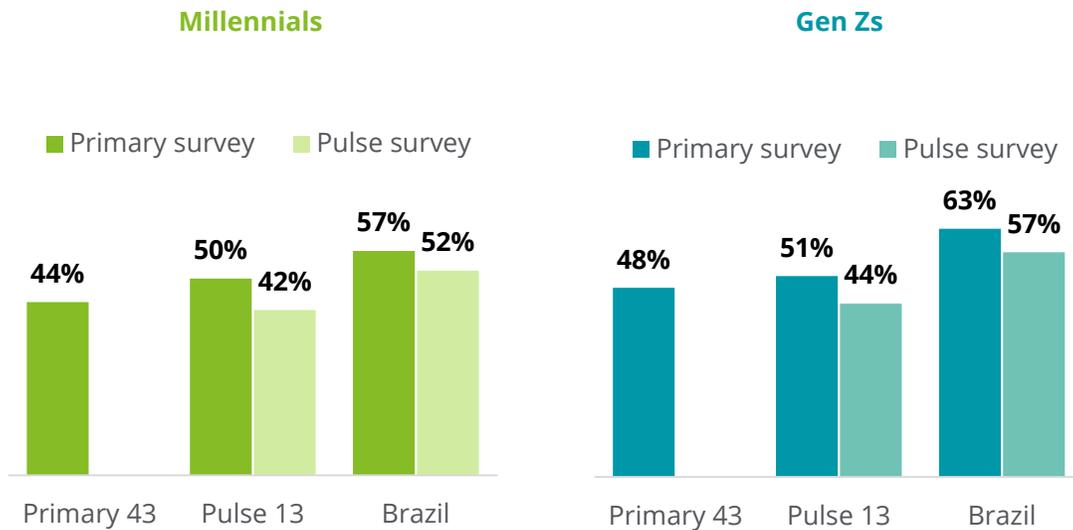


Mental health

Key Highlights

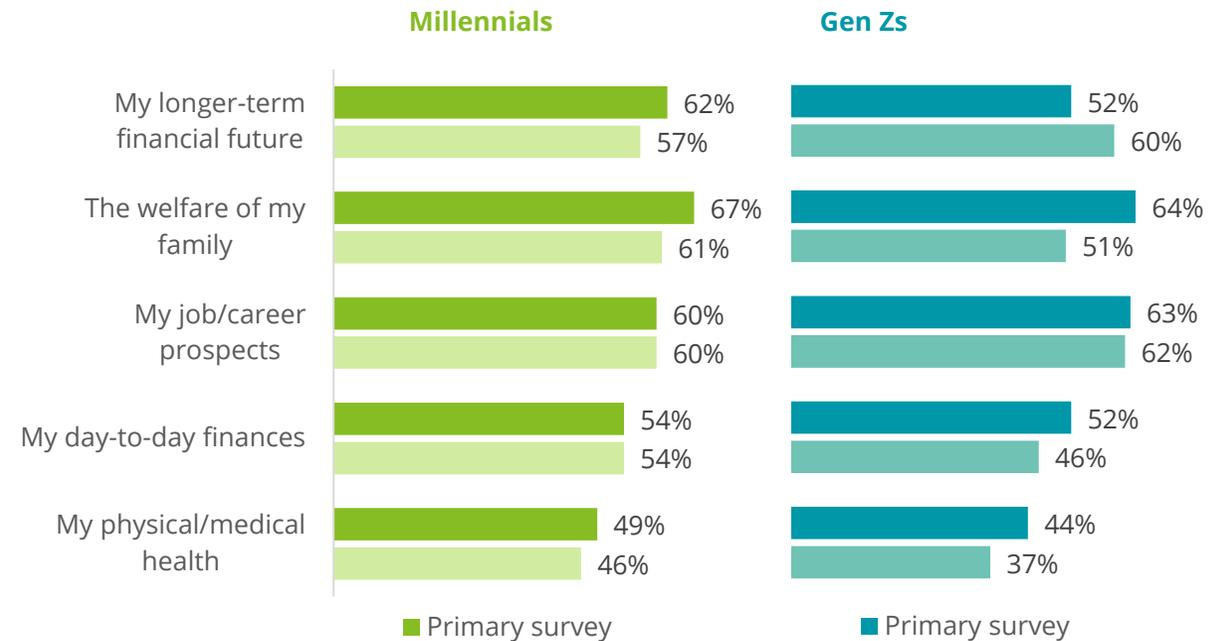
- Back in December, 57% of Brazilian millennials were stressed all or most of the time. Sixty-three percent of Gen Zs were. In the pulse survey, stress levels declined slightly, consistent with the other countries in the pulse survey.
- In both the primary and pulse surveys, the #1 cause of stress for millennials in Brazil was the welfare of their family. For Gen Zs, the #1 cause of stress in the pulse survey was their job/career prospects, rising from #2 in the primary survey.

% **Millennials** and **Gen Zs** in Brazil who agree they feel anxious or stressed all or most of the time



Q: How often would you say you feel anxious or stressed?

% **Millennials** and **Gen Zs** in Brazil who are regularly stressed say ... contributes a lot to their feelings of stress



Q: To what extent do each of the following contribute to your feelings of anxiety or stress?



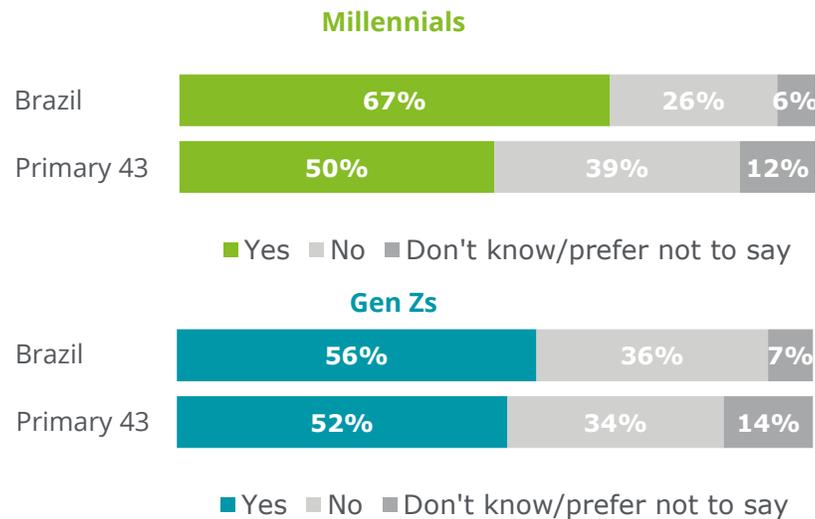
Mental health

Key Highlights

- Millennials and Gen Zs in Brazil were more likely to agree that stress is a legitimate reason to take time off work than global respondents. Millennials in Brazil were even more likely to agree than their Gen Z counterparts.
- Before the pandemic, 25% of Millennials and 20% of Gen Zs took time off work because of stress. During the pandemic, the average was about the same. Interestingly, 75% of Brazilian millennials admitted that was the reason to their employers pre-pandemic, signifying their comfort level. That number fell to just over half during the pandemic.

% Millennials and Gen Zs in Brazil* who agree that stress is a legitimate reason to take time off work

(Results from the primary survey)



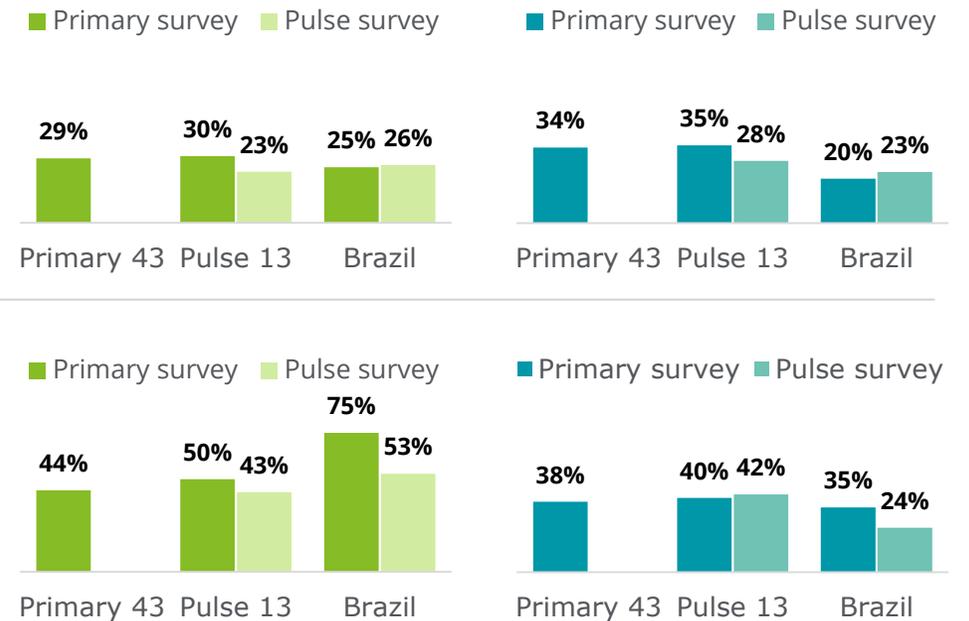
Q: Do you believe feelings of anxiety or stress are a legitimate reason to take time off from work? (i.e. as a sick day/leave of absence) *in full-time, part-time, temporary or unpaid employment

% Millennials and Gen Zs in Brazil* who...

Have taken time off work in the past 12 months/since January due to anxiety or stress



Of those who have taken time off for stress, percent who told their employers that their absence was due to anxiety or stress



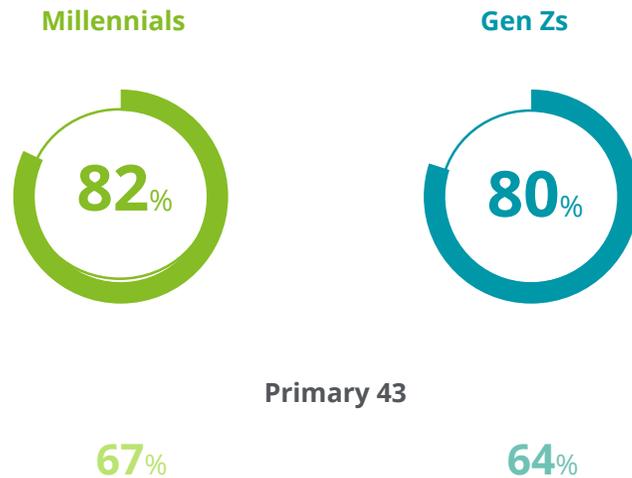
Q: in the past 12 months/since January, have you ever taken time off work (i.e. a sick day/leave of absence) due to feelings of anxiety or stress? (regardless of whether anxiety or stress was the reason you gave to your employer at the time) Q: When you took time off work due to feelings of anxiety or stress, did you tell your employer this was the reason? Or did you say it was because of a different reason? *in full-time, part-time, temporary or unpaid employment

Key Highlights

- Around 4 in 5 millennials and Gen Zs in Brazil say they often worry about their general financial situations.
- Back in December 80% of mills and Gen Zs thoughts their financial situations would improve in the next 12 months. That dipped by 20% in May.

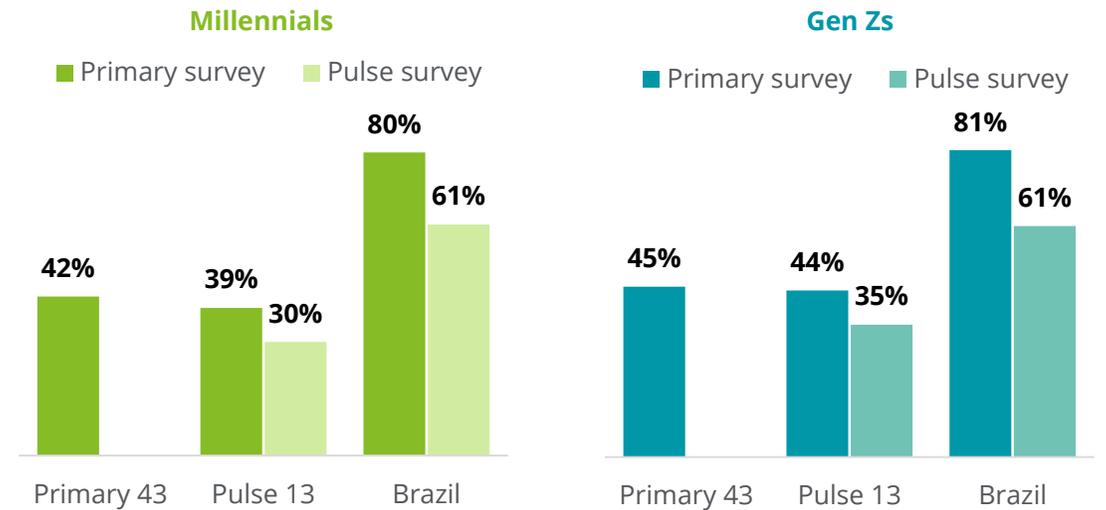
% Millennials and Gen Zs in Brazil who often worry or get stressed* about their general financial situations

(Results from the primary survey)



Q: To what extent do you agree or disagree with the following statements? I often worry/get stressed about my general financial situation *strongly agree or tend to agree

% Millennials and Gen Zs in Brazil who agree that their financial situation over the next 12 months will improve



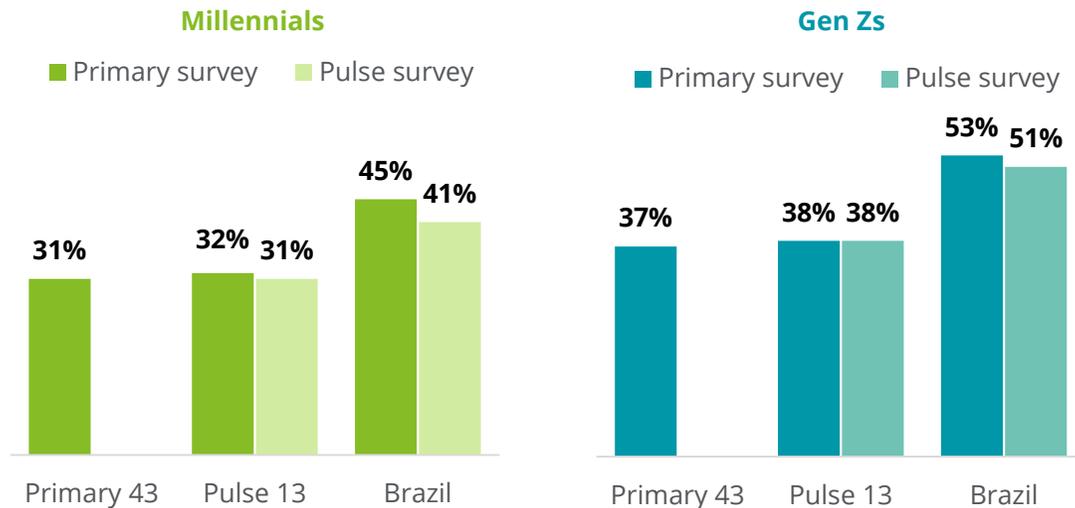
Q: How do you expect your personal financial situation to change over the next 12 months?

Key Highlights

- Forty-five percent of Brazilian millennials and 53% of Gen Zs indicated in December they'd have a hard time if they received an unexpected bill. That figure pretty much stayed the same in May.
- The percentage who have missed a bill went down for both mills and Gen Zs in May from December to around 30%.

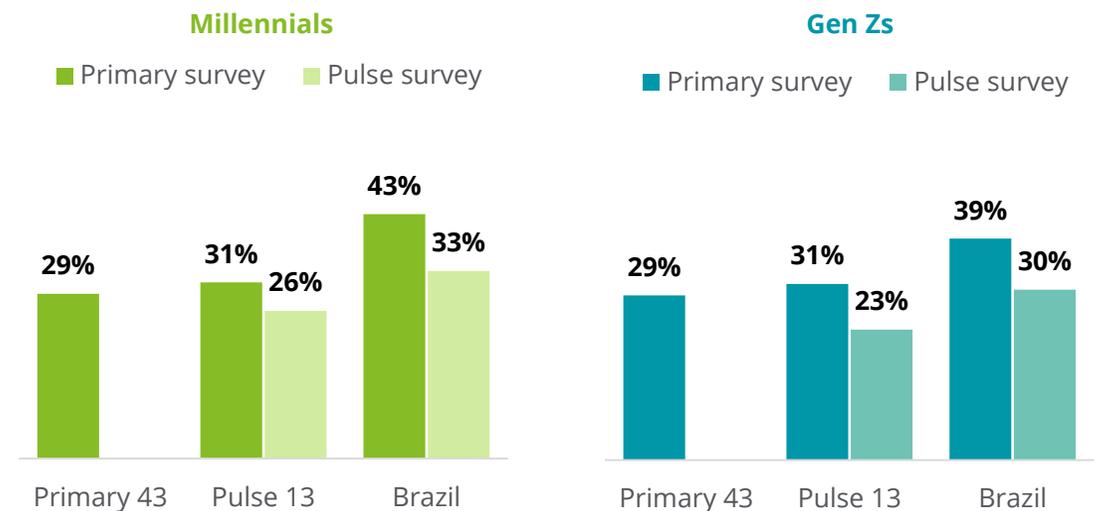
% Millennials and Gen Zs in Brazil who agree that...

I couldn't cope financially if I unexpectedly received a large bill or had to fund a major expense



Q: Please indicate whether the following statements are true or false... I could cope financially if I unexpectedly received a large bill or had to fund a major expense

I have missed paying or haven't been able to pay a bill/fixed payment in the last six months

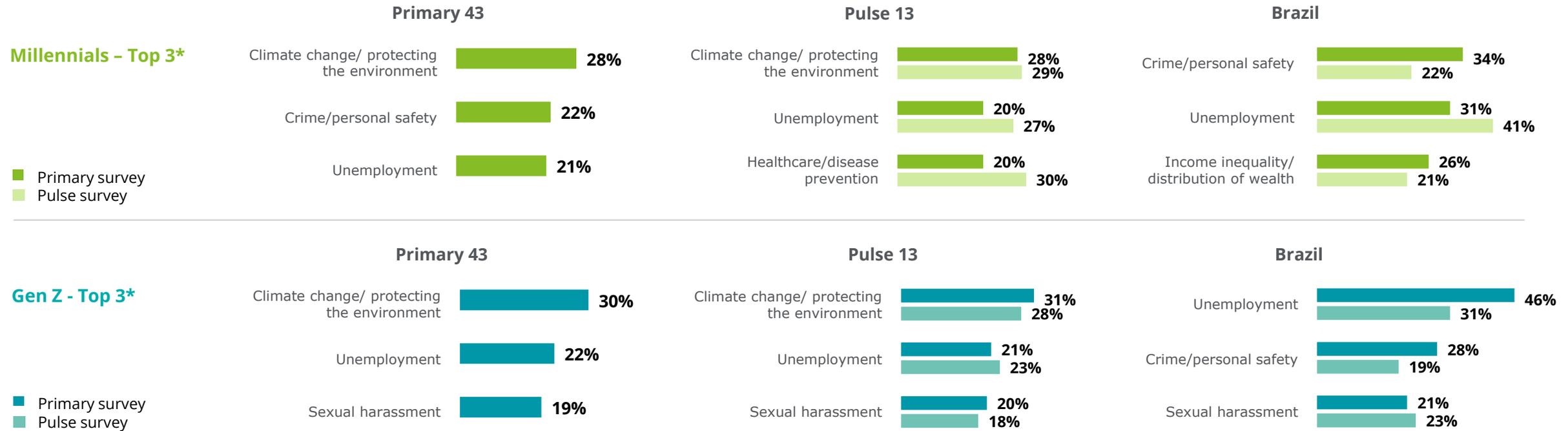


Q: Please indicate whether the following statements are true or false... I have missed paying or haven't been able to pay a bill/fixed payment in the last six months

Key Highlights

- Unemployment became the #1 concern for both millennials and Gen Zs in Brazil in the pulse survey (it already was for Gen Z and dropped slightly in the pulse survey), followed by crime / personal safety in the #2 position for both age groups. This is in contrast to the global population, where climate change and healthcare / disease prevention were of greater concern than expressed in Brazil.

% Millennials and Gen Zs in Brazil are concerned about...

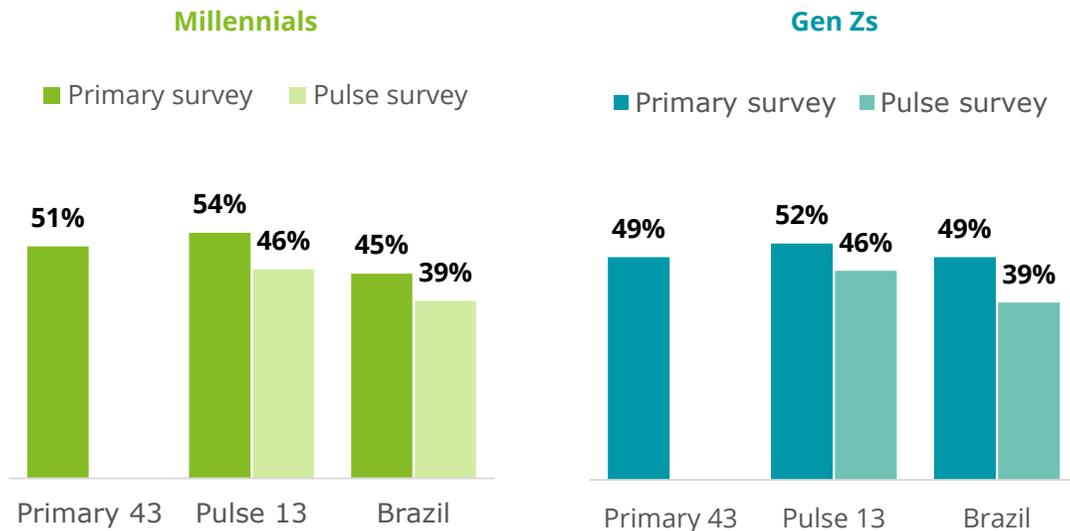


Q: Which three of these issues are of greatest concern to you? *Top 3 for pulse 13 and country ranked based on primary survey

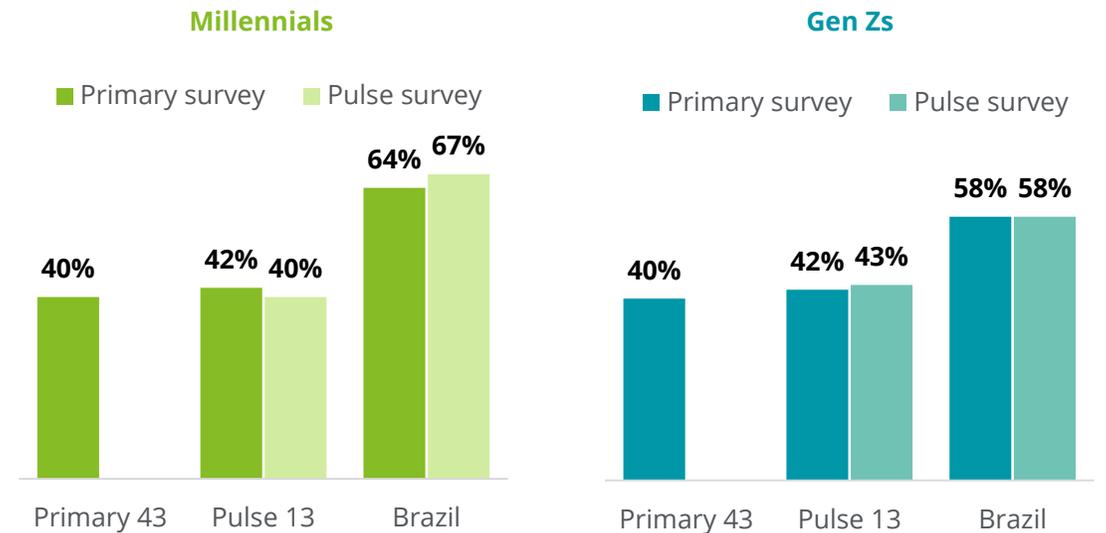
Key Highlights

- Brazilian millennials and Gen Zs were less likely to say that we have hit the point of no return for the environment in the pulse survey (May) than in the primary survey (Dec) (perhaps due to seeing the environment respond positively to the world essentially shutting down).
- Brazilian millennials and Gen Zs were more optimistic than the global population that the efforts to protect the health of the planet would be successful.

% **Millennials** and **Gen Zs** in Brazil who strongly agree/tend to agree that we have already hit the point of no return and it is too late to repair the damage



% **Millennials** and **Gen Zs** in Brazil who are optimistic that efforts to protect/sustain the health of the planet will be effective



Q: To what extent do you agree or disagree with the following statements related to the environment? We have already hit the point of no return and it is too late to repair the damage

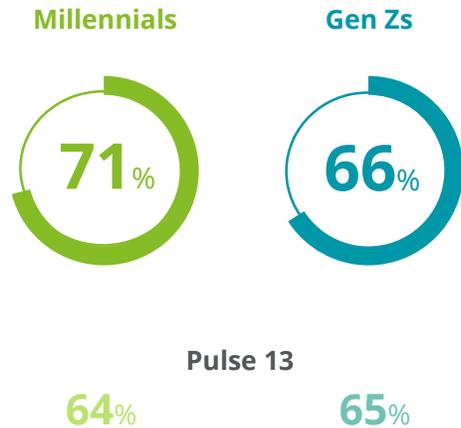
Q: Are you generally optimistic or pessimistic that efforts to protect and sustain the health of the planet will be effective?

Key Highlights

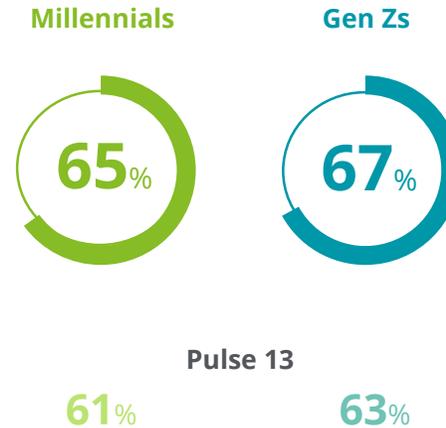
- Two-thirds of mills and Gen Zs in Brazil believe that climate change will be less of a priority for business and government because of the economic ramifications of the pandemic.
- But more than 80% of Brazilian youth plan to keep making positive behavioral changes to help the environment.

% Millennials and Gen Zs in Brazil who strongly agree/tend to agree that...

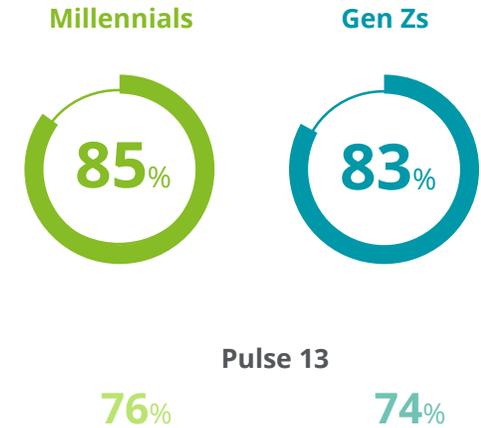
In the long term, environmental/climate change initiatives will be less of a priority for business because of the economic impact of the pandemic



In the long term, environmental/climate change initiatives will be less of a priority for governments because of the economic impact of the pandemic



Given the environmental impact resulting from responses to COVID-19, I will continue some of the behavior changes I have made to limit my own impact on the environment



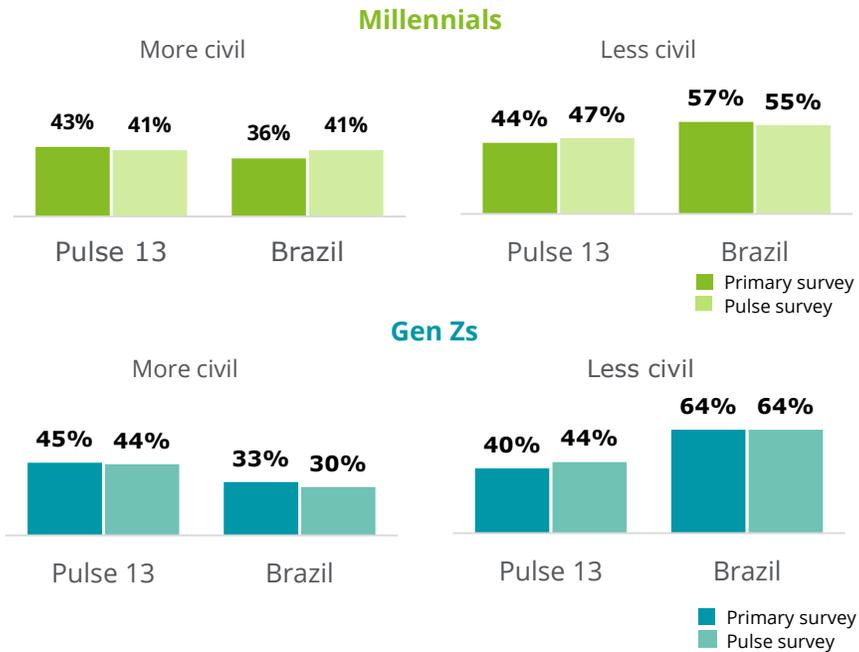
Q: To what extent do you agree or disagree with the following statements related to the environment?

Sense of responsibility

Key Highlights

- More Millennials and Gen Zs in Brazil think society is becoming less civil towards one another than more civil.
- From a personal responsibility perspective, Brazilian youth, especially millennials, plan to take action to have a positive impact on their communities.

% **Millennials** and **Gen Zs** in Brazil who say that we are becoming more or less civil toward one another

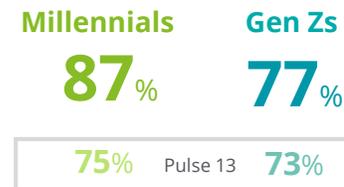


Q: If 'civility' is defined as treating others with respect and politeness, do you think that, as a society, we are becoming more civil or less civil toward one another?

% **Millennials** and **Gen Zs** in Brazil who strongly agree/tend to agree that...

This pandemic has highlighted new issues for me and made me more sympathetic towards...

...the needs of others in my local community

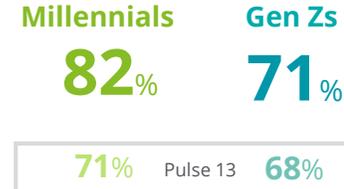


...the needs of different people around the world



In response to the pandemic...

...I have taken immediate actions to try and have a positive impact on my community



...I will take positive actions to have a positive impact on my community once restrictions are lifted



Q: To what extent do you agree or disagree with the following statements?

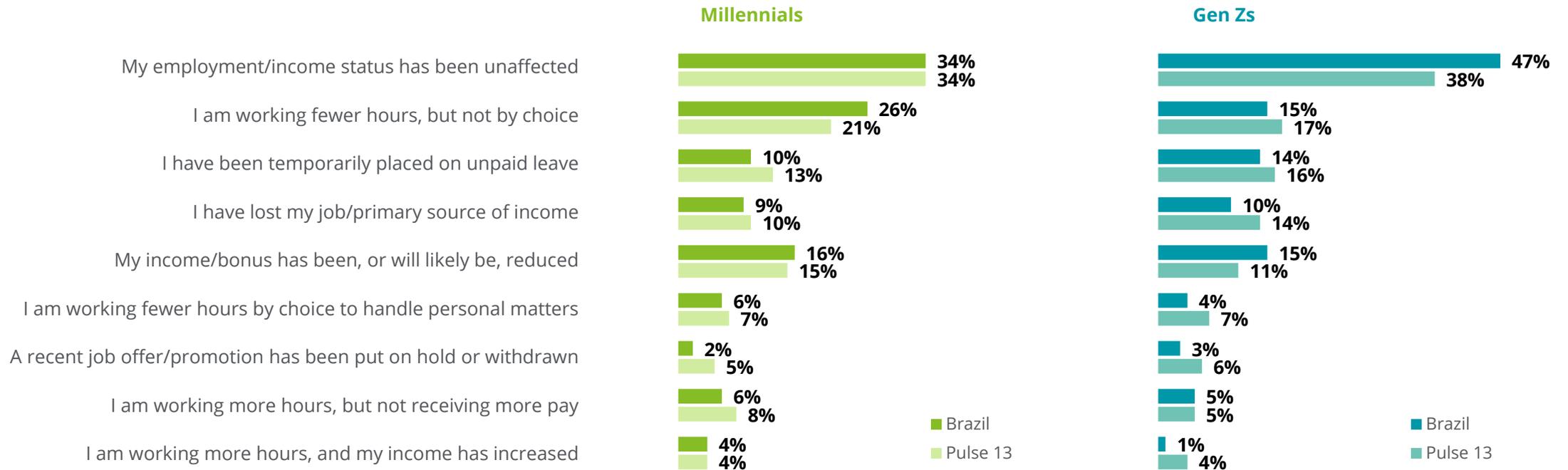


Work — current employment status

Key Highlights

- Millennials in Brazil were more likely to say than the pulse countries that they were working fewer hours but not by choice and that their income had been reduced. 9% more Gen Zs in Brazil said that their income status had been affected. In fact, 13% more Gen Zs than millennials in Brazil say that their income status been affected, indicating that the pandemic has hit the youngest generation hardest.

% Millennials and Gen Zs in Brazil whose employment or income status has changed as a result of the current COVID-19 pandemic



Q: How, if at all, has your employment/income status changed as a result of the current COVID-19 pandemic? Please tick all that apply.

Work — loyalty

Key Highlights

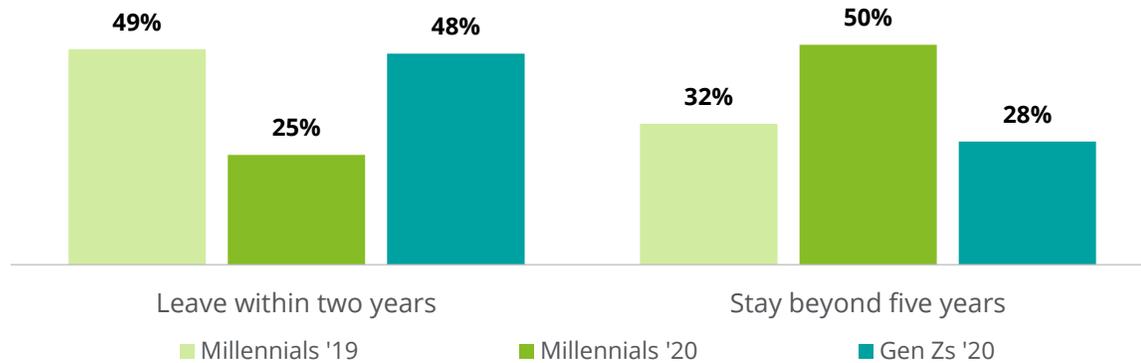
- There was a dip in millennials and Gen Zs wanting to leave their employers within 2 years from 2019 to 2020 (consistent with global findings), and an increase in those wanting to stay 5+ years.
- Across the board, millennials in Brazil were more pleased with the actions of their employers during the crisis than their Gen Z counterparts. In particular, far more millennials than Gen Zs said their employer had taken actions to support their mental health, and far more said their employer's actions made them want to stay with them for the long term.

% Millennials and Gen Zs in Brazil* who expect to leave/stay with their current employers...

(Results from the primary survey)

Primary 43

| | | |
|------------------------|-----|-----|
| Leave within two years | 31% | 50% |
| Stay beyond five years | 35% | 21% |



Q: 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? *in full-time or part-time employment

% Millennials and Gen Zs in Brazil* who strongly agree/tend to agree that...

Pulse 13



Q: Thinking specifically about your current employer's response to COVID-19, to what extent do you agree or disagree with the following statements? *in full-time, part-time or temporary employment **e.g. flexible working hours, leave/sick/leave policies, etc.

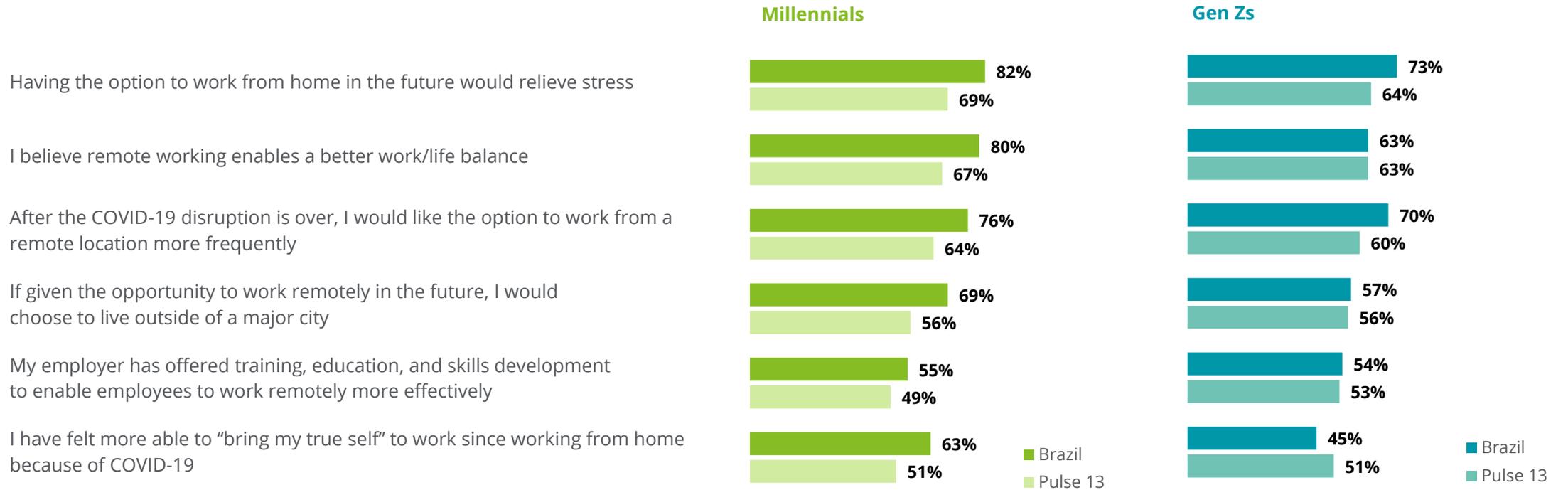


Work — future of the workplace

Key Highlights

- For each future of the workplace question, millennials in Brazil agreed more strongly than their pulse country counterparts. They agreed most strongly that having the option to work from home relieves stress, enables better work / life balance, and would like the option to work remotely more frequently after the pandemic is over. In each case, millennials in Brazil responded more strongly than their Gen Z counterparts.

% Millennials and Gen Zs* in Brazil who strongly agree/tend to agree that...



Q: To what extent do you agree or disagree with the following statements about working from home/a remote location, rather than working from your employer's premises/offices? *in full-time, part-time or temporary employment

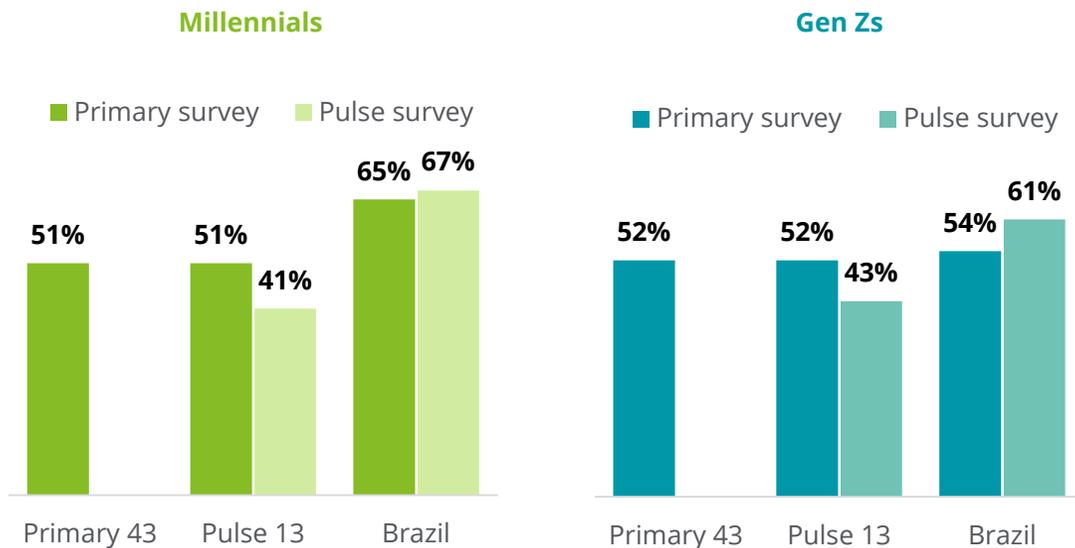


View of institutions – business

Key Highlights

- Brazilian millennials and Gen Zs are much more likely to say business has a positive impact on society than their global counterparts.
- Sixty-nine percent of Brazilian mills think business' actions during the pandemic have shown a genuine commitment to society.

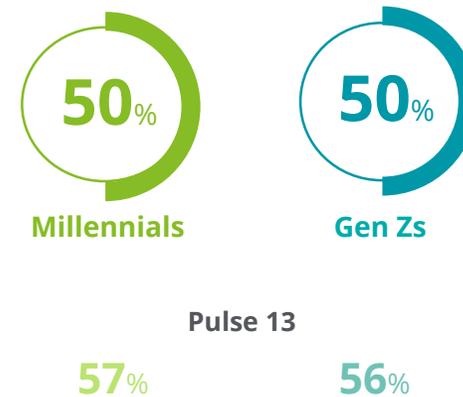
% **Millennials** and **Gen Zs** in Brazil who say businesses in general have a very/fairly positive impact on the wider society in which they operate



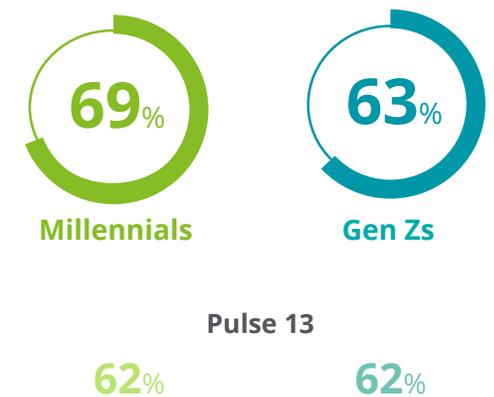
Q: Thinking about businesses in general around the world, what impact do you think they are having on the wider society in which they operate?

% **Millennials** and **Gen Zs** in Brazil who strongly agree/tend to agree that...

In general, businesses have put people ahead of their profits during the pandemic



In general, businesses' actions during the pandemic have shown a genuine commitment to society



Q: Thinking now about the response of business in general to the COVID-19 pandemic, to what extent do you agree or disagree with the following statements?



View of institutions - government

Key Highlights

- Only around a third of millennials and a quarter of Gen Zs in Brazil said that they were pleased with the speed of the government’s response. This is significantly lower than how the pulse countries responded.
- Fewer millennials and Gen Zs in Brazil than the Pulse 13 said that the government has taken appropriate actions to support workers and that the government has gone too far in putting restrictions in place. And a fewer percentage think the gov’t restrictions have gone too far.

% Millennials and Gen Zs in Brazil who strongly agree/tend to agree that*...

I am pleased with the speed with which our national government has acted in response to the pandemic

Millennials



Gen Zs



Pulse 13

53%

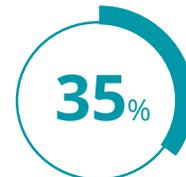
51%

Our national government has taken the appropriate actions to support workers during the pandemic

Millennials



Gen Zs



Pulse 13

59%

56%

Our national government has gone *too far* in the restrictions/measures it has implemented to limit the spread of COVID-19

Millennials



Gen Zs



Pulse 13

38%

36%

Q: Turning to your own national government, to what extent do you agree or disagree with the following statements about the [country] government’s response to COVID-19? *Not asked in China

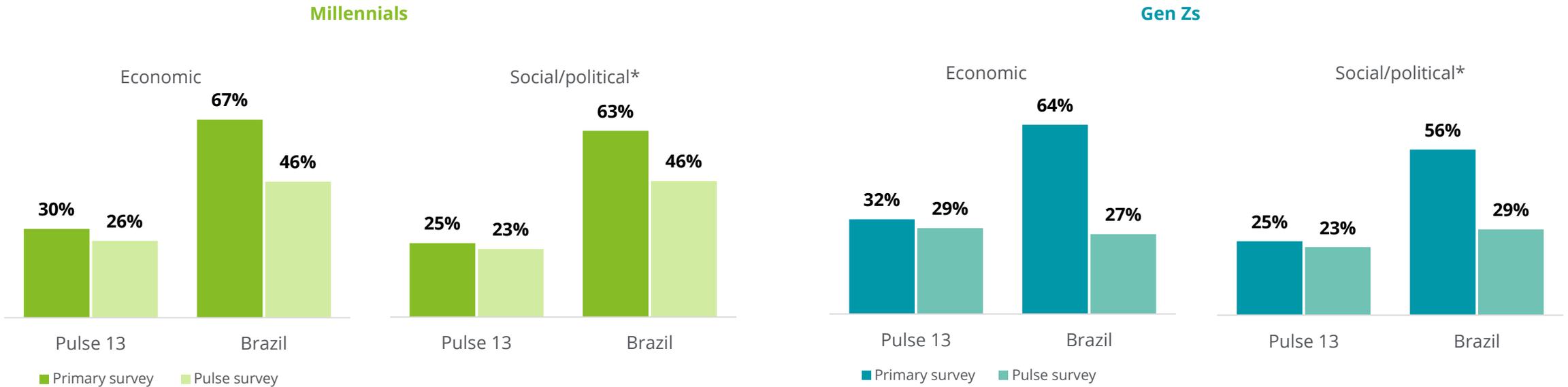


Economic and political outlook

Key Highlights

- Millennials and Gen Zs in Brazil were far less likely to say in the pulse survey than in the primary survey that the economic and social / political situations in their countries will improve in the next 12 months. While this trend is consistent with the reaction among the pulse countries, it is more prevalent in Brazil where the percentage decrease was much greater and where in the primary survey millennials and Gen Zs were more likely to say that their situations would improve than not.

% **Millennials** and **Gen Zs** in Brazil who say the economic and social/political situations in their countries will improve in the next 12 months ...



Q: Taking everything into account, do you expect the overall economic situation in {#Country} to improve, worsen or stay the same over the next 12 months?

Q: Taking everything into account, do you expect the overall social/political situation in {#Country} to improve, worsen or stay the same over the next 12 months? *Not asked in China



The "Millz Mood Index"

The Millz Mood Index gauges the mood of respondents and provides a snapshot of millennials' and Gen Z's optimism that the world and their places in it will improve

Brazil

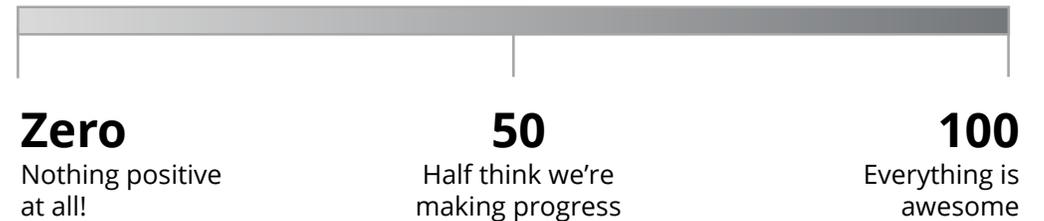
Primary survey



Pulse survey



Scores are based on results from the following five question topics that are aggregated to create a measure of between zero and a hundred.





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Base Notes

2020 Deloitte Millennial Survey

Please see below for the base size of respondent groups referred to throughout this deck:

| | PRIMARY 43 (Millennials/Gen Z) | PULSE 13 (Millennials/Gen Z) | | BRAZIL (Millennials/Gen Z) | |
|---|--|--|---------------------|--------------------------------------|---------------------|
| | Primary survey | Primary survey | Pulse survey | Primary survey | Pulse survey |
| All respondents | 13,715/4,711 | 4,146/3,062 | 5,501/3,601 | 319/236 | 423/277 |
| All excluding China | 13,396/4,475 | 3,827/2,827 | 5,078/3,324 | - | - |
| In full-time or part-time work | 11,059/2,136 | 3,397/1,409 | - | 235/99 | - |
| In full-time, part-time, temporary or unpaid work | 11,787/2,411 | 3,549/1,560 | 4,720/1,842 | 271/120 | 360/140 |
| In full-time, part-time or temporary work | - | - | 4,683/1,801 | - | 360/139 |
| Regularly stressed | 12,415/4,112 | 3,760/2,685 | 5,070/3,199 | 301/228 | 406/269 |
| Have taken time off work due to stress | 3,459/829 | 1,068/552 | 1,096/509 | 69/24 | 93/32 |

Please note base size below 50.