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The 2018 Deloitte Millennial Survey

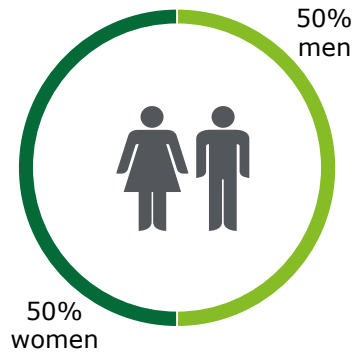
China

May 2018

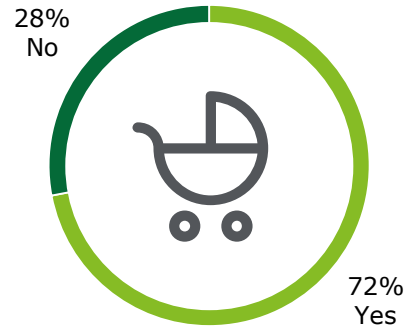
Background

523 Millennial interviews achieved in China (all in full-time employment)

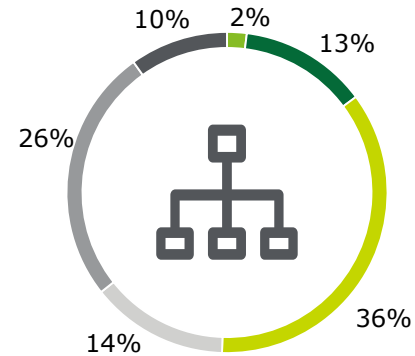
Gender



Have children

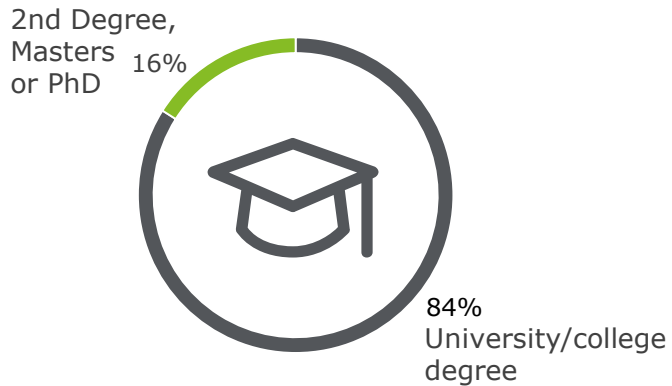


Job seniority/level

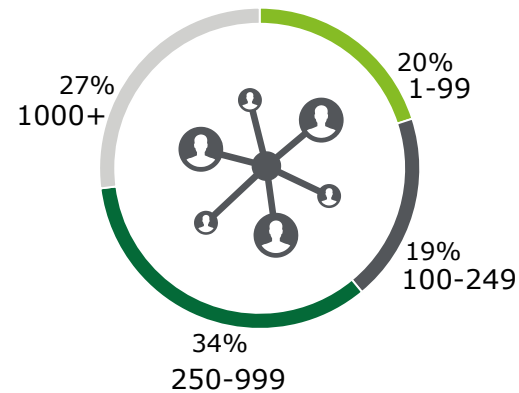


- Trainee/apprentice/graduate
- Junior-level executive
- Mid-level executive
- Senior executive
- Head of department/division
- Senior management team/board

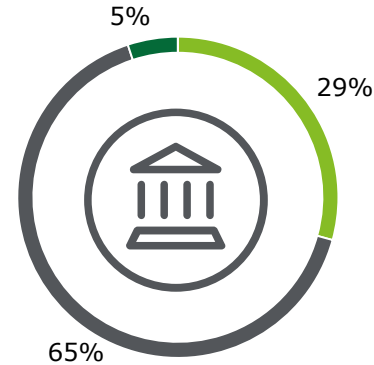
Education level



Organization size



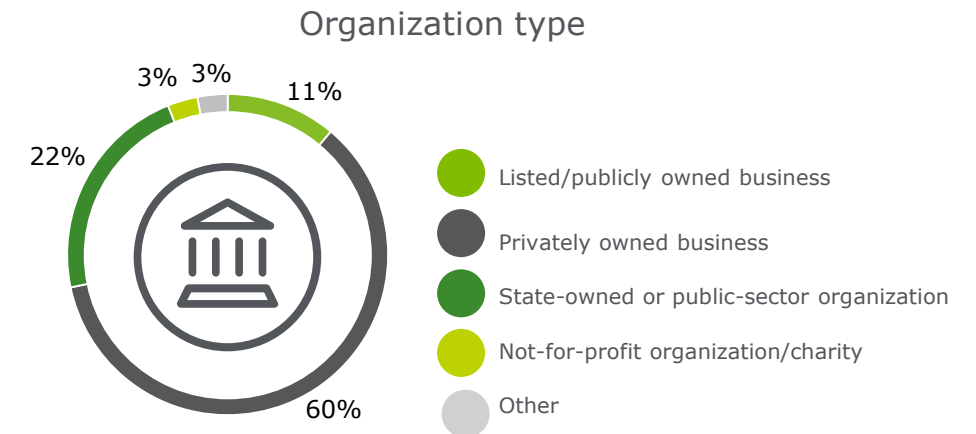
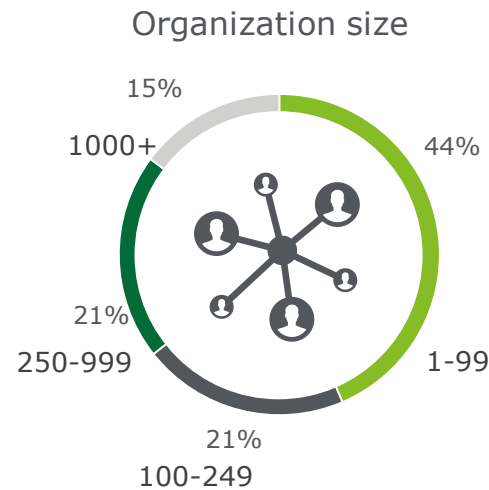
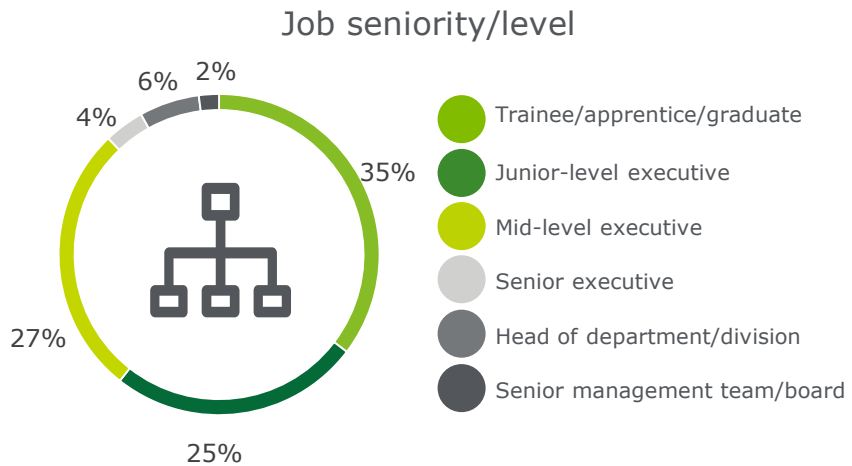
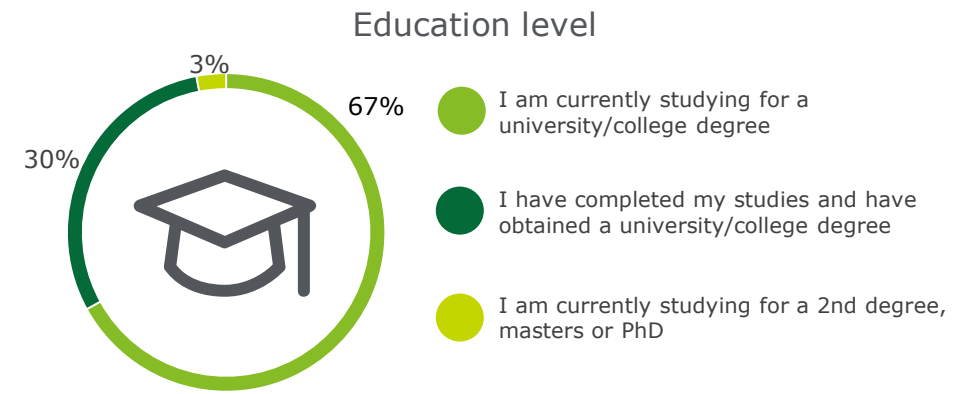
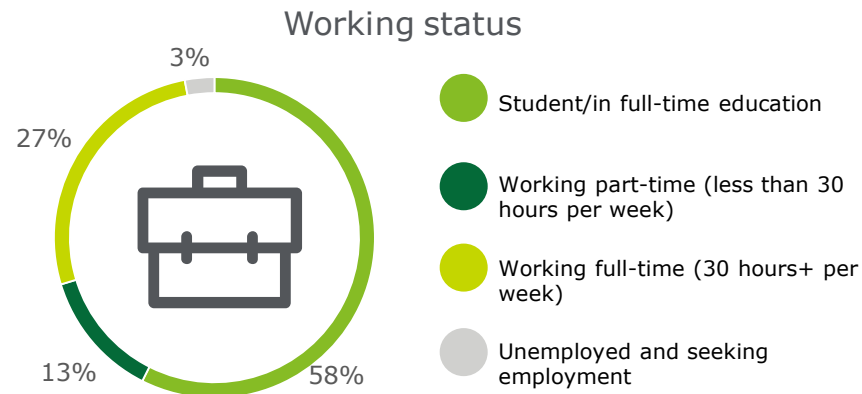
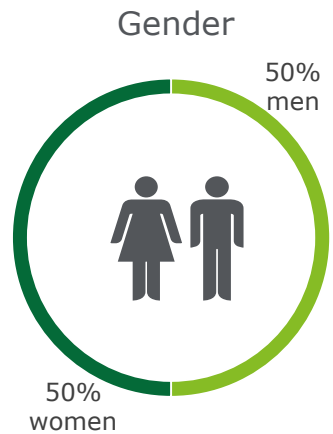
Organization type



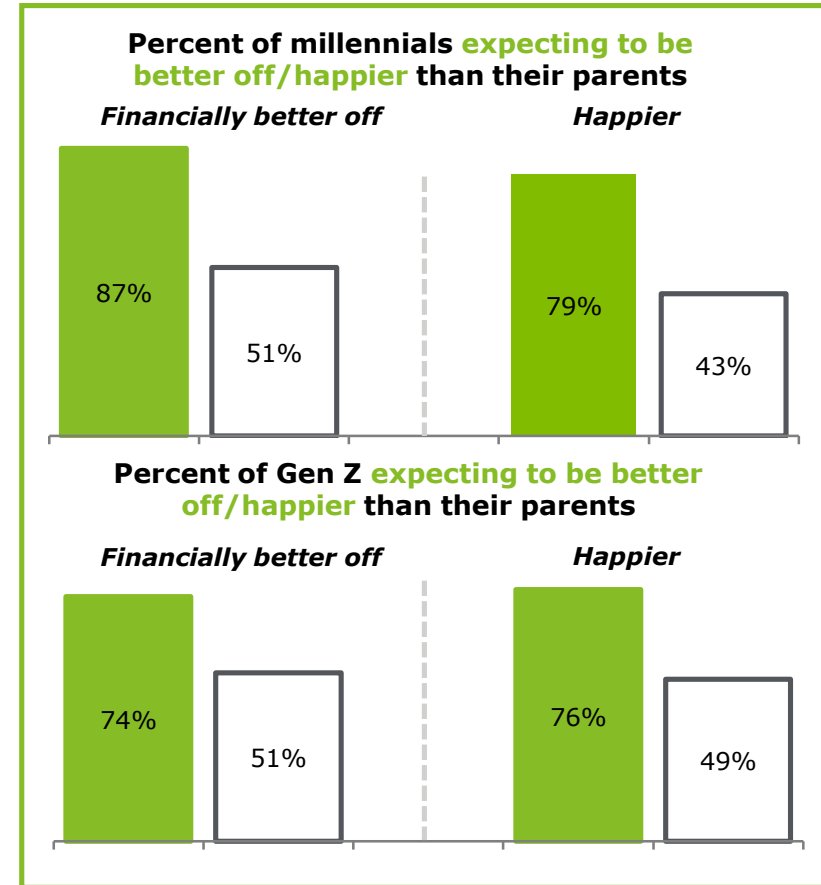
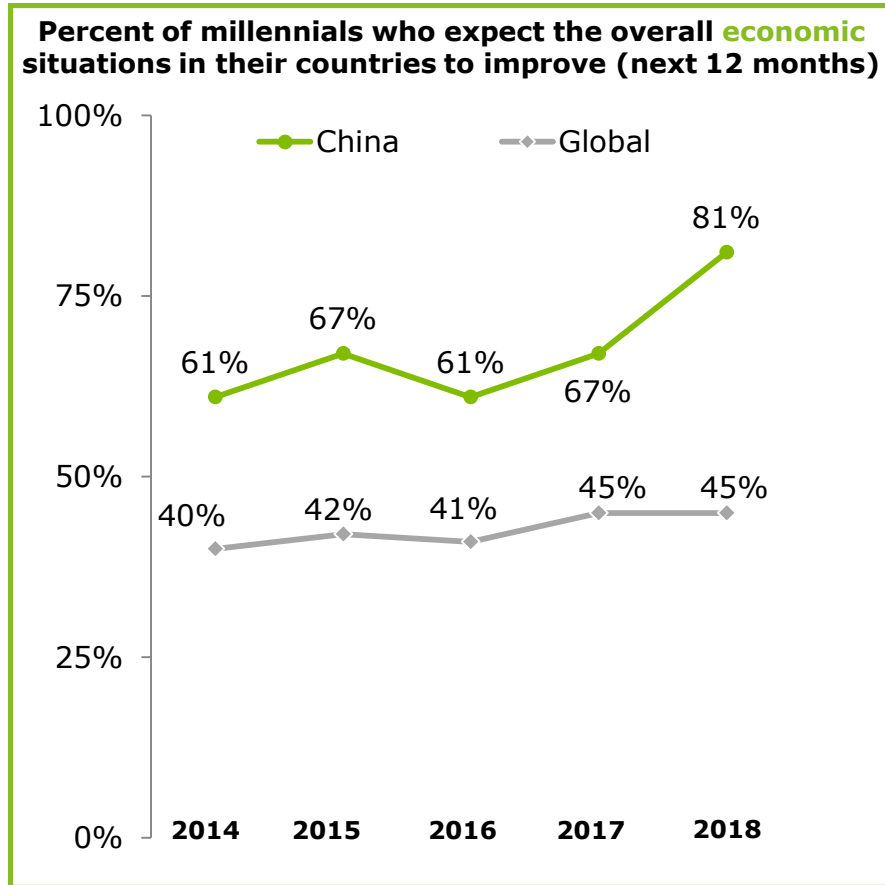
- Listed/publicly owned business
- Privately owned business
- State-owned or public-sector organization

Background

310 Generation Z (Gen Z) interviews achieved in China (121 in employment)



China economic, political and social outlook



● China ● Global

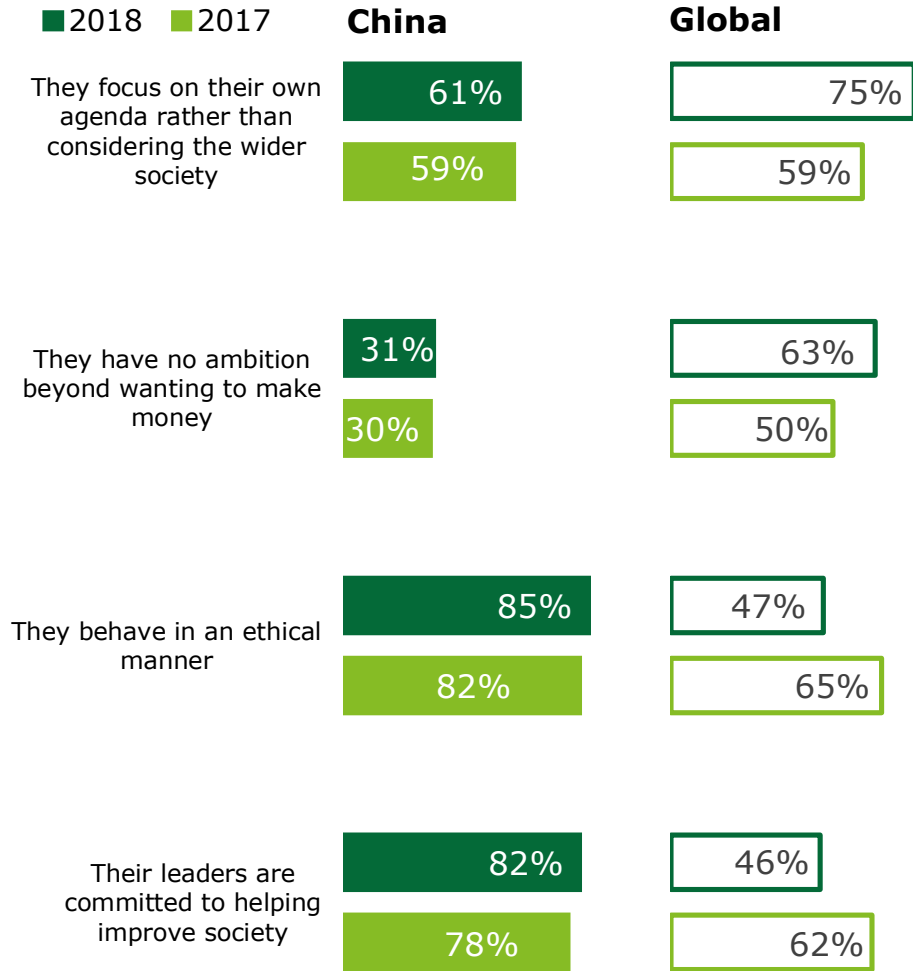
Top-five issues of greatest personal concern to millennials in China

- 1 40% **Climate change / protecting the environment / natural disasters**
- 2 34% **Income inequality / distribution of wealth**
- 3 33% **Healthcare / disease prevention**
- 4 32% **Stability of national economies**
- 5 30% **Ageing populations / demographic shifts**

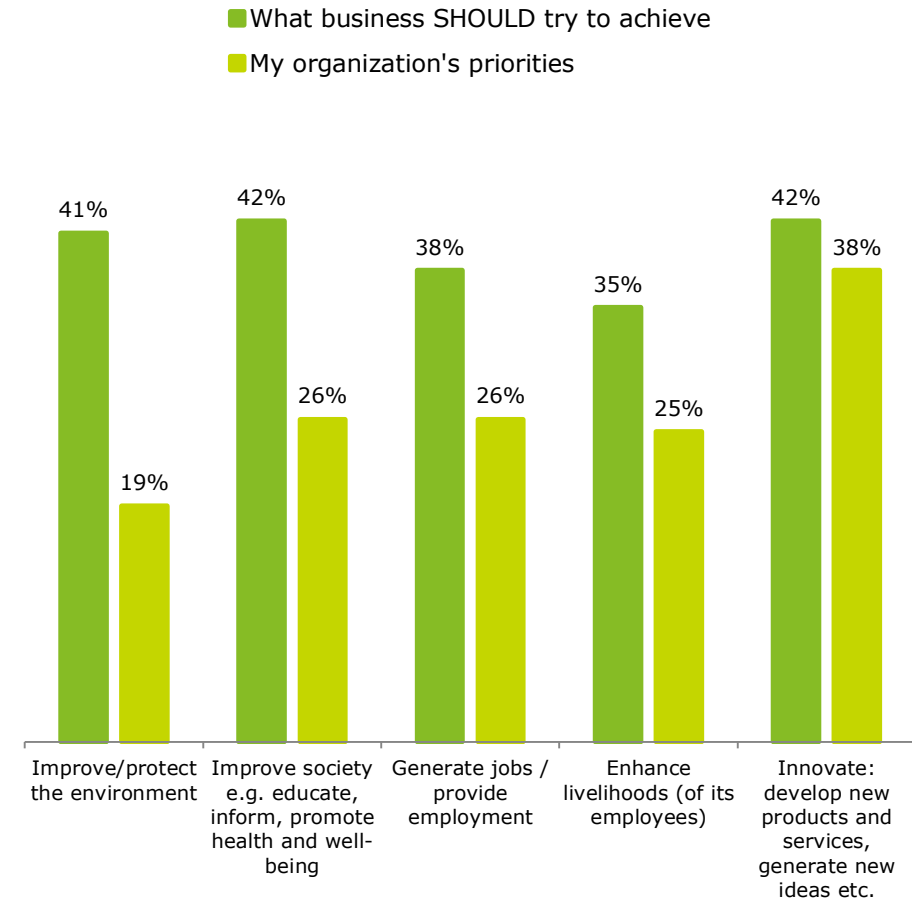
Q1. Do you expect the overall economic situation in your country to improve, worsen or stay the same over the next 12 months?
 Q3A/B. How do you feel about the future? Compared to your parents do you think you will be financially/materially better off/happier?
 Q4. Thinking about the challenges facing societies around the world, which three of the following issues are you personally most concerned about?
 Base Millennials/Gen Z: China: 337/307; Global 10,455/1,844

China behavior, priorities and impact of business

Percent of millennials who agree with the following statements about **business' behavior**



Percent of millennials who say businesses... (showing top five "unmet" ambitions)



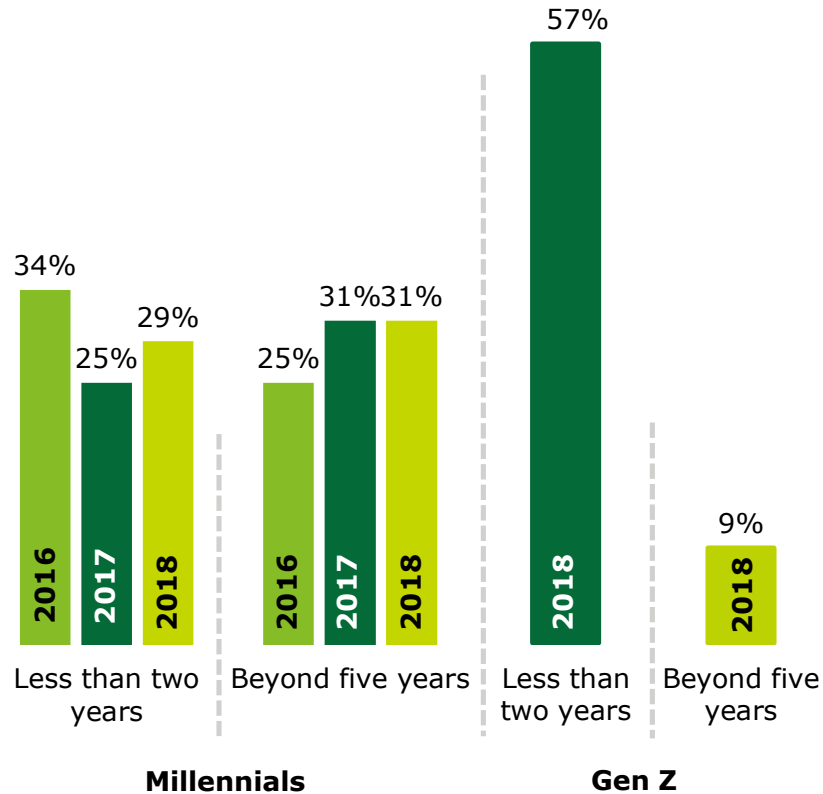
Q12. Thinking about businesses around the world, would you agree or disagree that the following statements describe their current behavior? Q11a. Which of the following words and phrases match your own belief as to what business should try to achieve? Select up to three.

Q11b. And what would you say are the main priorities pursued by the organization you currently work for? Select up to three.

Base Millennials: China 337, Millennials Global 2018 / 2017 10,455 / 7,900

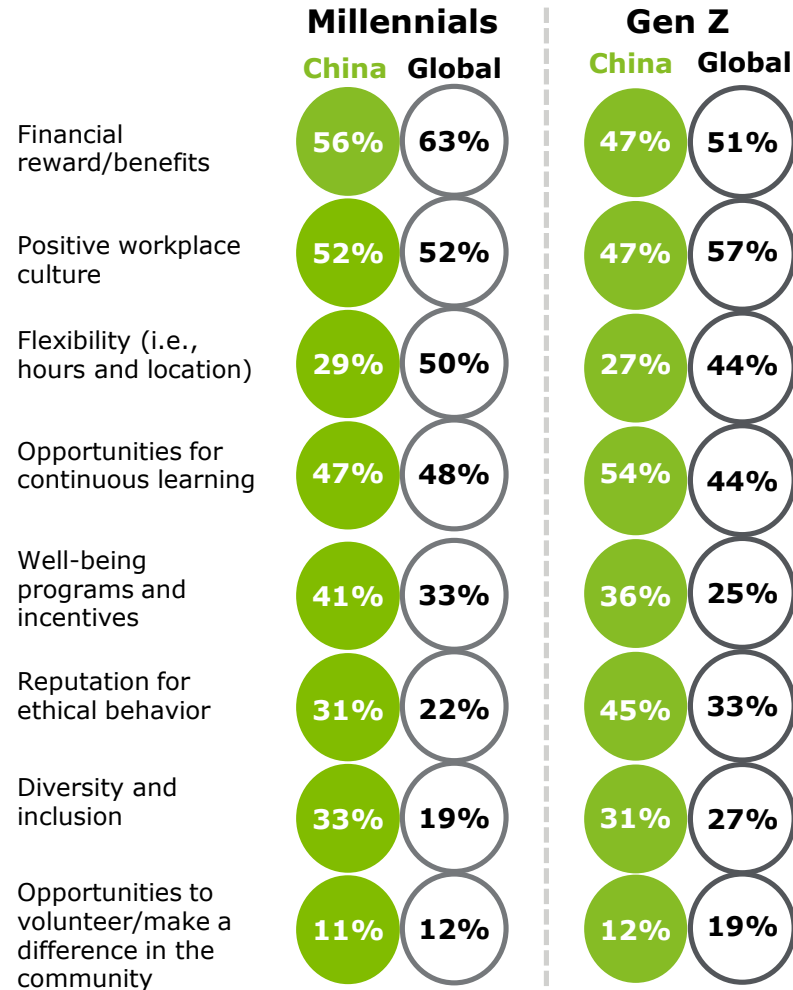
China, turnover and the gig economy

Percent who expect to stay with their current employers for...

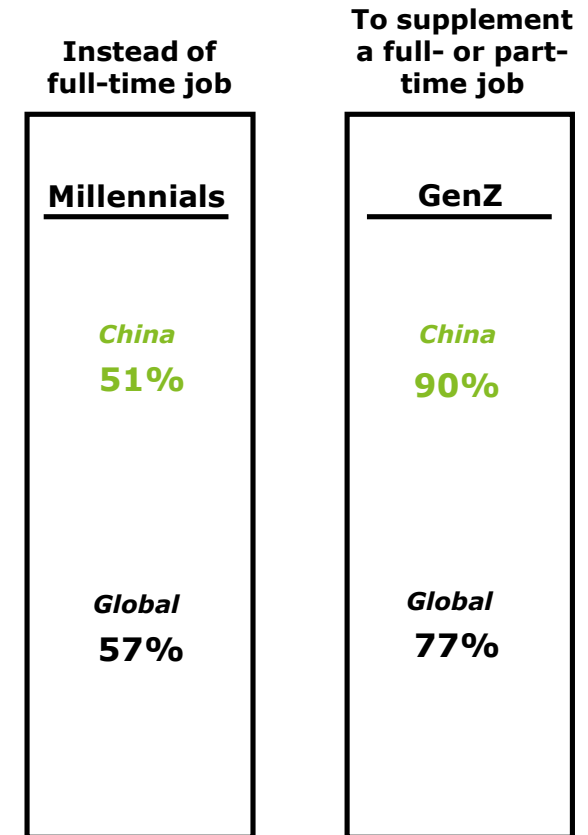


Q14. If you had a choice, how long would you stay with your current employer before leaving to join a new organisation or do something different?
 Q22. In general, how important are the following aspects when you are considering working at an organization? Please select each in order of their importance to you, from most important (1) to least important (8).
 Q24. The recent rise of the 'gig economy' has seen large numbers of people leave full-time employment or supplement their income by taking on short-term contracts or freelance work. Would you consider joining the 'gig economy' by taking on such roles...
 Base Millennials / Gen Z: China: 337 / 307, Millennials Global 2018 / 2017 10,455 / 7,900 Global Gen Z 1,844

What is important when choosing an employer?

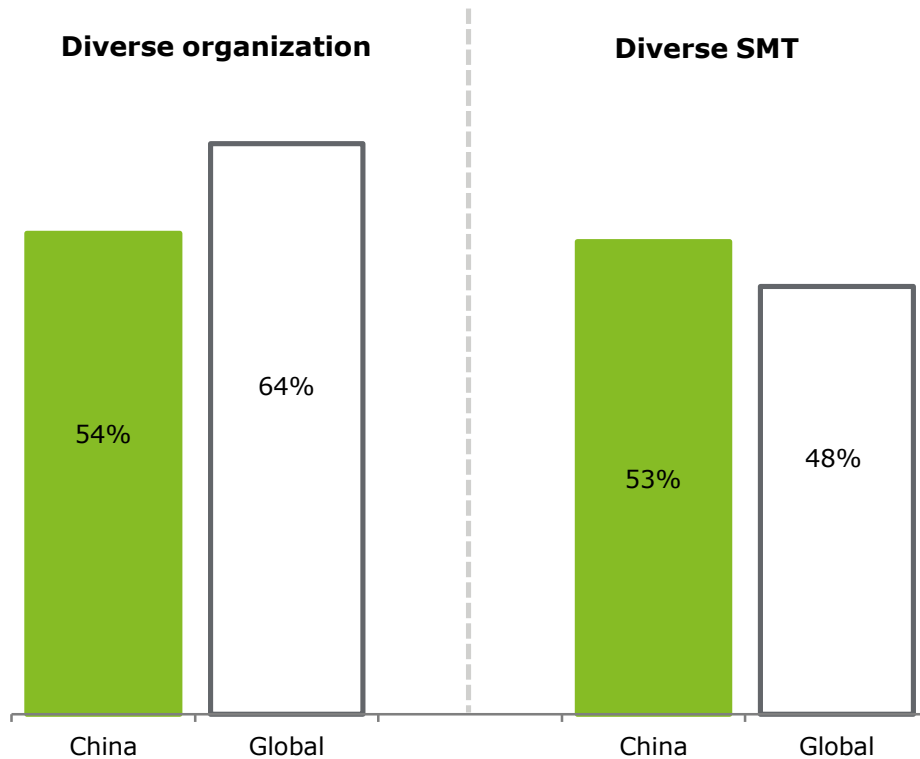


Millennials already joining or considering the gig economy...

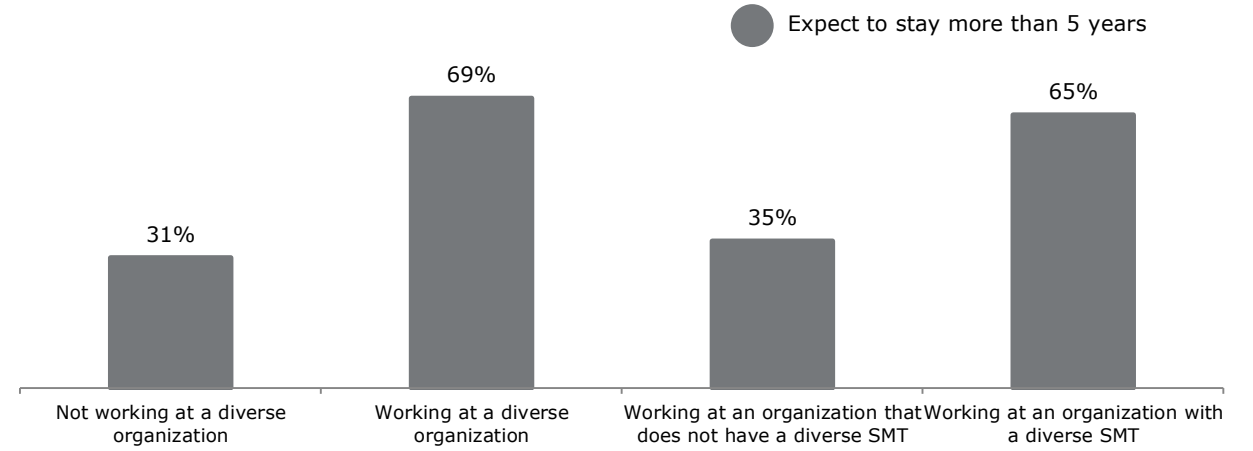


Diversity, flexibility and millennials' loyalty in China

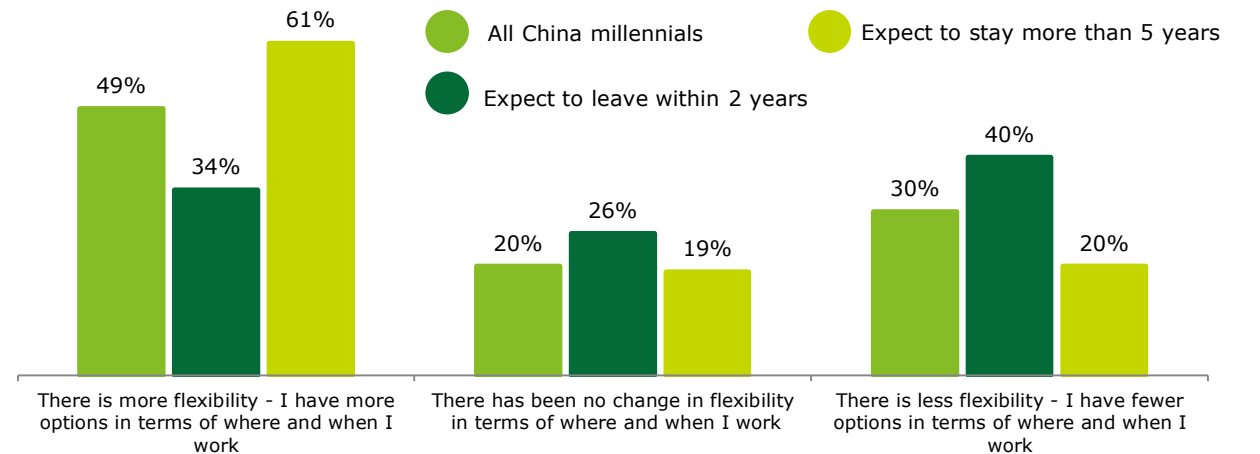
% of millennials who work for diverse organizations, or have diverse senior management teams (SMT)...



Percent of millennials who expect to stay with their employer for more than 5 years...



Percent of millennials who say that in the past three years...



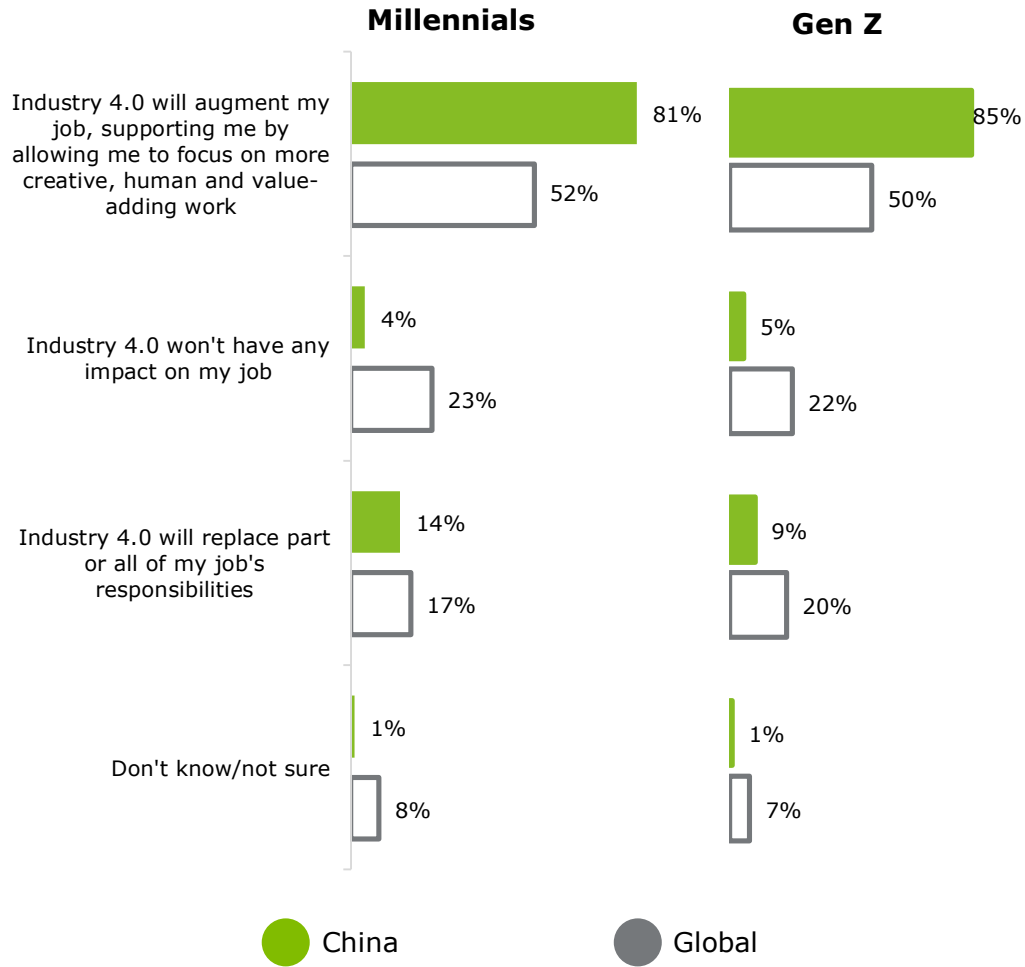
Q43. As regards the extent to which it reflects the wider society in which it operates, how would you describe the current level of diversity in... Your organization's establishments in the China / Your organization's senior leadership team?

Q16. Thinking of the past three years, which of the following statements best reflects your experience of working at your current organization?

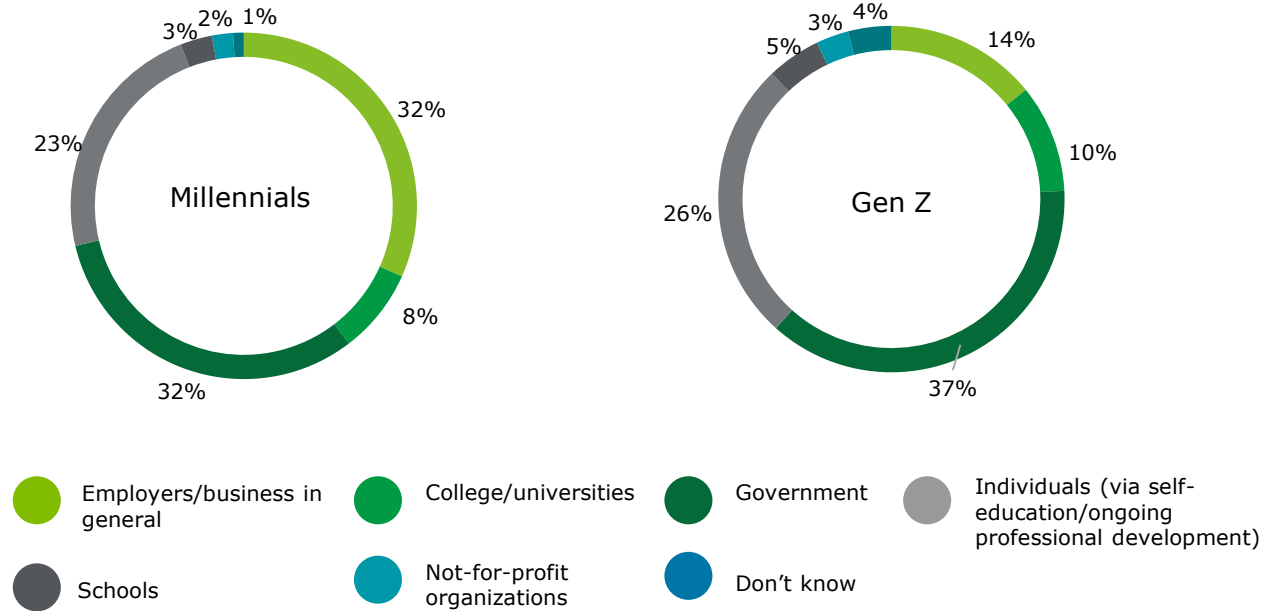
Base: All China Millennials 337, Expecting to stay more than 5 years 103, Millennials who have worked in the same organization for over two years 235, Expect to leave within 2 years 45, Expect to stay more than 5 years 93

Industry 4.0: Impact and development

Percent of millennials or Gen Z who agree with the following statements about the **impact of Industry 4.0**



Percent of China millennials and Gen Z saying these groups are **most responsible** for preparing workers for Industry 4.0



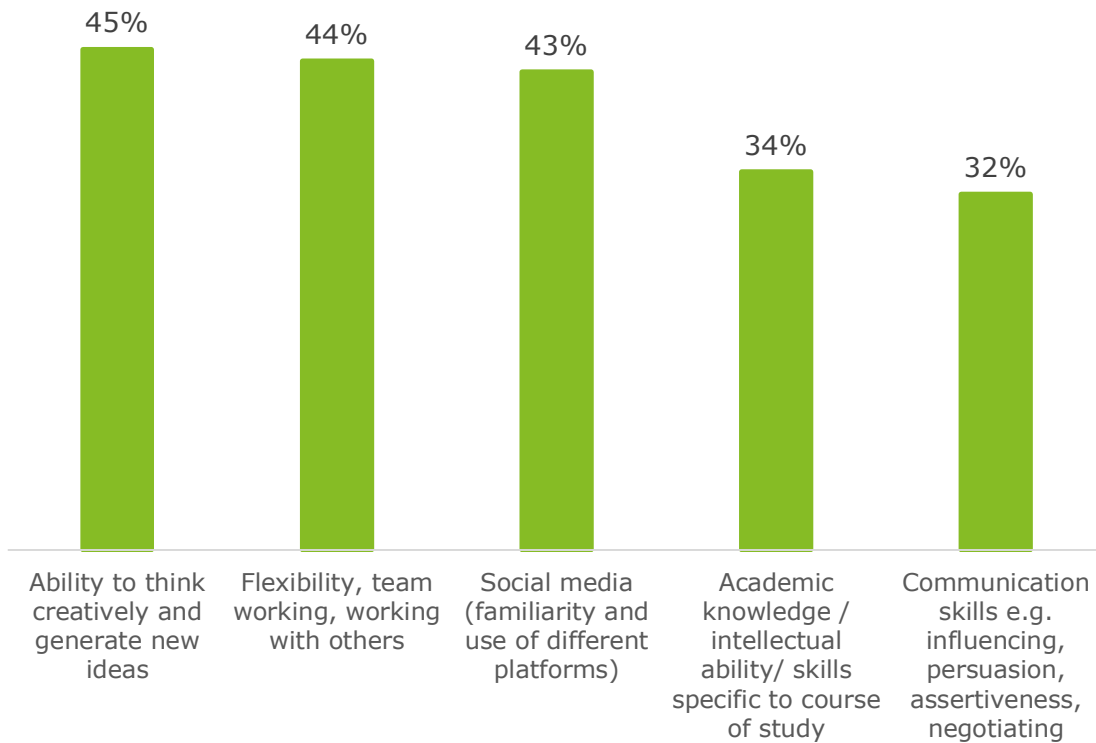
67% of millennials in China say their employers are helping to prepare them for Industry 4.0...

...compared with **36%** globally

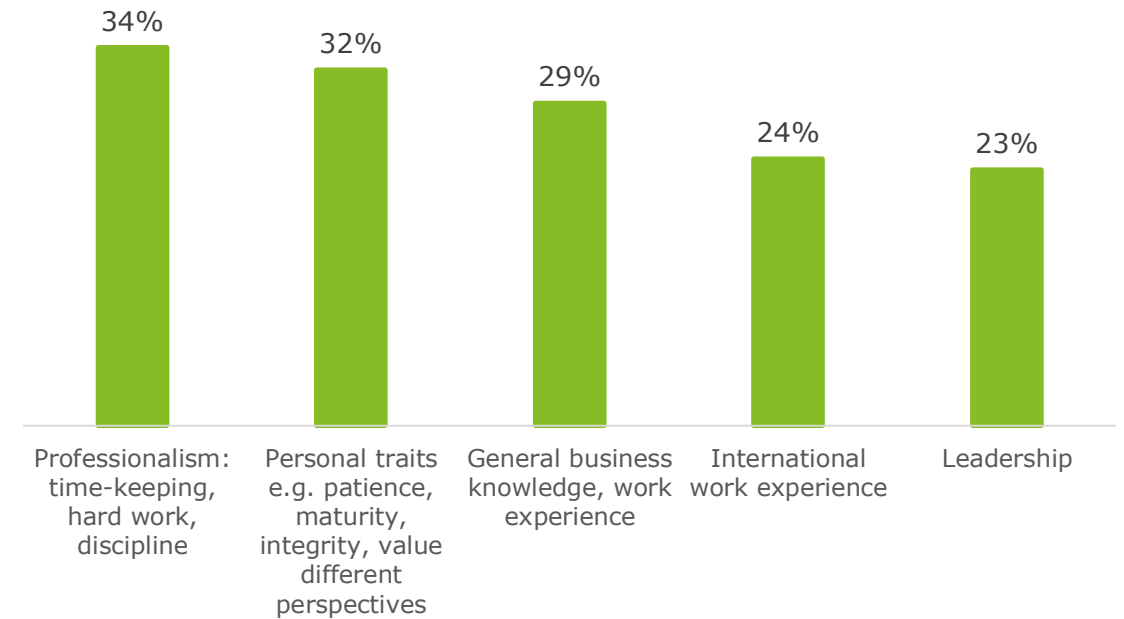
Q32. What impact, if any, do you think Industry 4.0 might have on your job? Q34b. Who should be most responsible for preparing workers for the changes that will result from Industry 4.0?
 Q35. Is your organization helping you understand and prepare for the changes of Industry 4.0?
 Base Millennials / GenZ in work: China: 337 / 120, Globally 10,455 / 682

Gen Z brings technical skills and new thinking to the workplace

Top-5 skills/attributes their generation will bring to the workplace, according to China Gen Z



Top-5 skills/attributes most lacking in their generation, according to China Gen Z



GZ4. What are the strongest skills or attributes that you believe people of your generation will bring to the workplace?
GZ5. And what skills or attributes do you believe are most lacking within your generation?
Base: China GenZ 307



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