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The 2020 Deloitte Millennial Survey
Germany

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 800 respondents from Germany**, 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 800 from Germany** 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 Germany compare to the pre-pandemic survey and examines how German respondents compare to their counterparts surveyed after the onset of the coronavirus crisis. **In total, we surveyed 1,600 respondents in Germany – 800 before the onset of coronavirus (500 millennials, 300 Gen Zs), and 800 after (500 millennials, 300 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 Germany (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 Germany (born 1995 – 2003) who participated in the primary survey

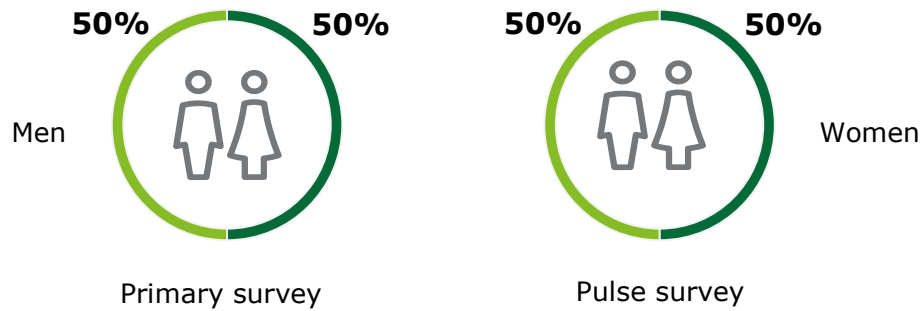


LIGHT TEAL: Gen Zs from the Pulse 13 countries (born 1995 – 2003) who participated in the pulse survey

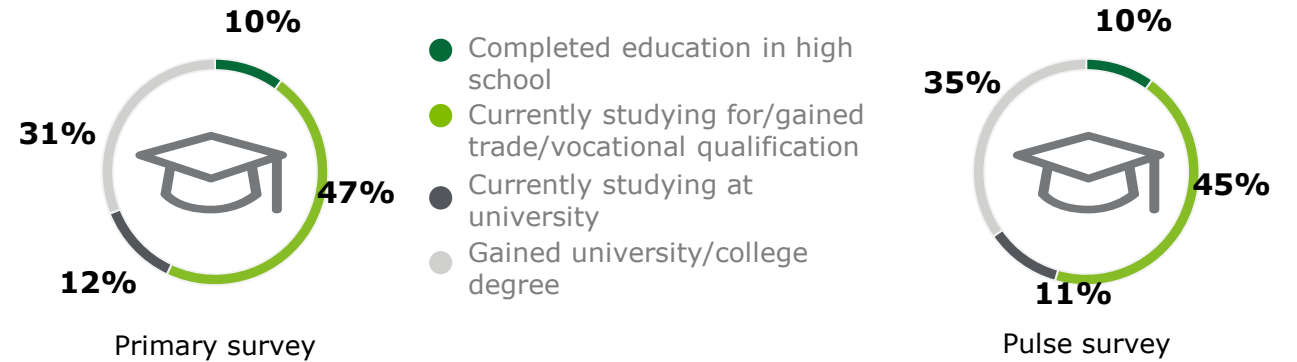
Sample profile (weighted)

1,000 Millennial interviews (500 Primary survey, 500 Pulse survey) conducted in Germany

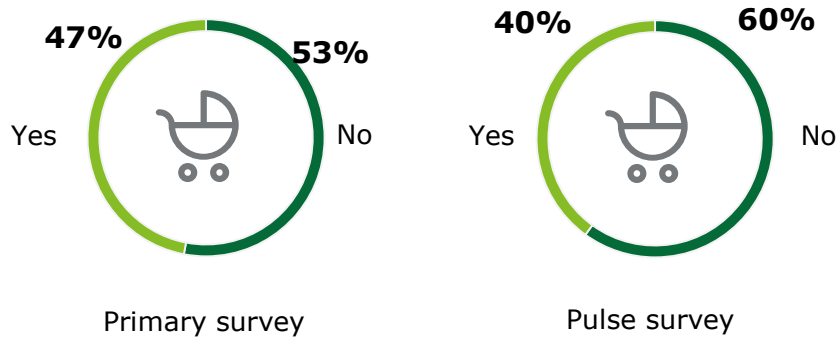
Gender



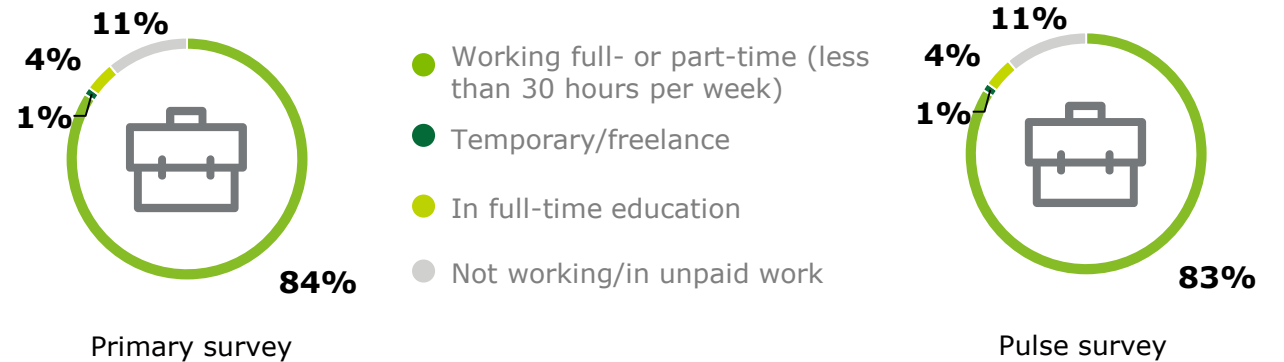
Education level



Have children



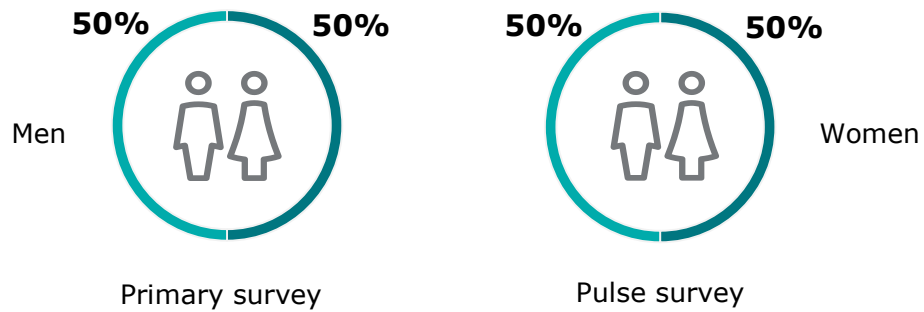
Working status



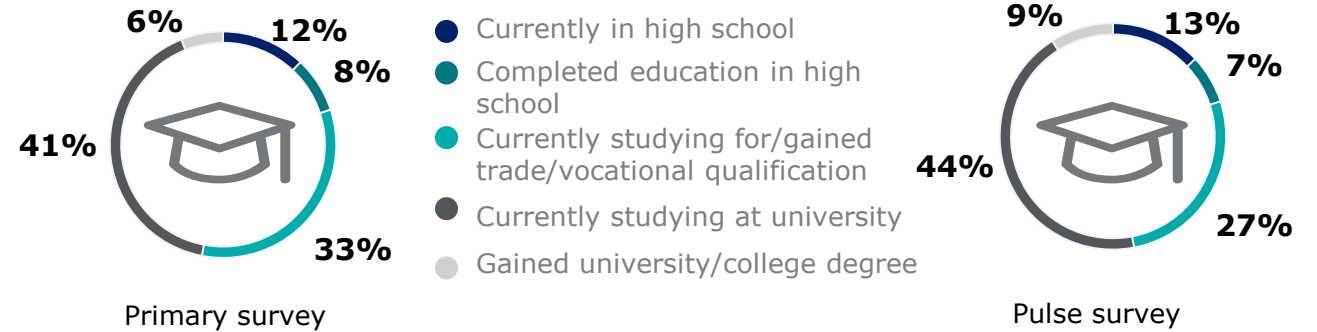
Sample profile (weighted)

600 Gen Z interviews (300 Primary survey, 300 Pulse survey) conducted in Germany

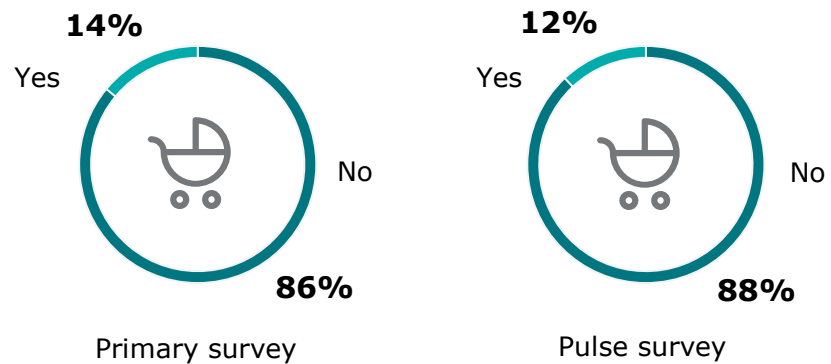
Gender



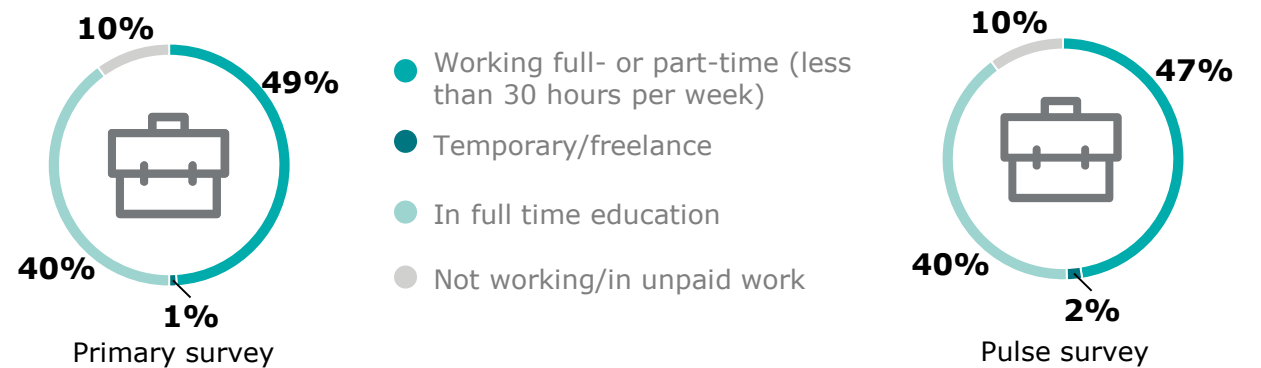
Education level



Have children



Working status



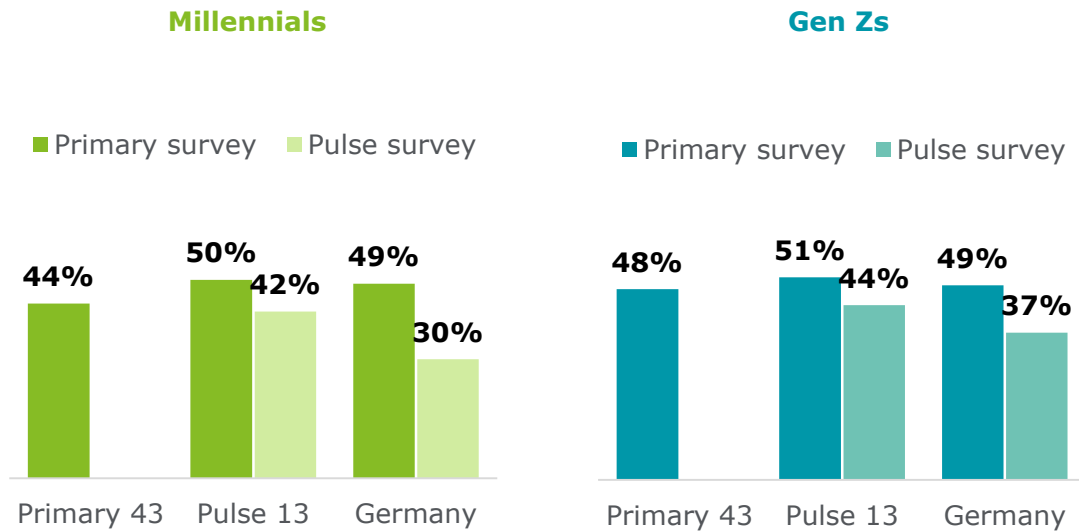


Mental health

Key Highlights

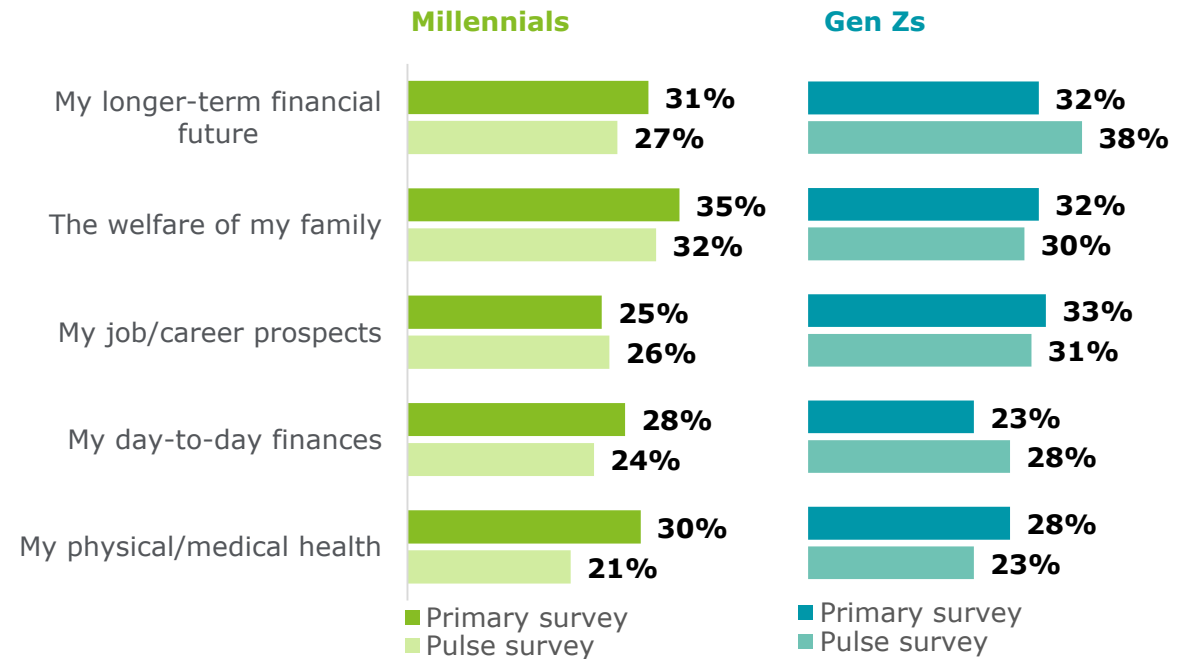
- Whereas around half of Germany's millennials and Gen Zs said in the primary survey that they felt stressed all or most of the time, that figure dropped in the pulse survey. This downward trend is consistent with the pulse countries overall.
- In the pulse survey, millennials in Germany were the least likely of the pulse countries to say that their day-to-day finances, longer-term financial futures, and physical well-being contributed to them feeling stressed or anxious.

% **Millennials** and **Gen Zs** in Germany 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 Germany 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?



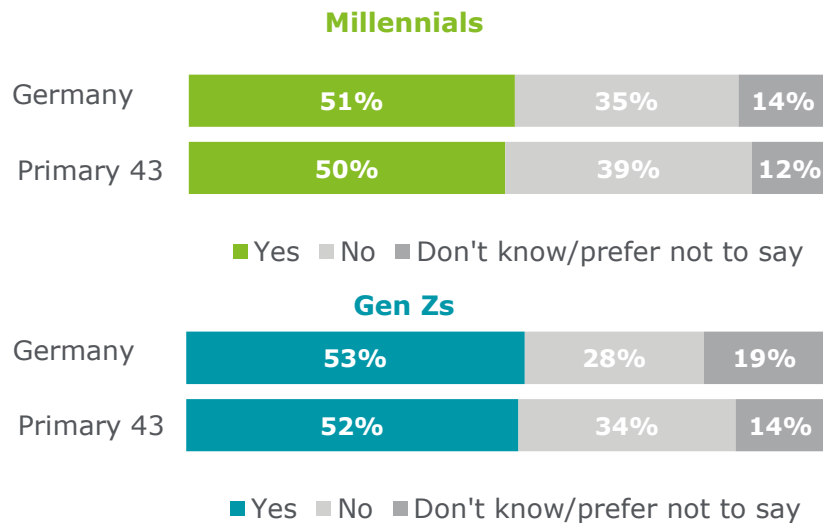
Mental health

Key Highlights

- A little over half of millennials and Gen Zs in Germany said that stress was a legitimate reason to take time off work.
- Around a third of those taking stress-related leave among Germany's Gen Zs admitted the reason for their absence to their employers, a figure which stayed consistent across the two surveys. While more millennials admitted the reason to their absence than their Gen Z counterparts, the number fell between the primary and pulse survey, suggesting that the pandemic may be playing a role in further stigmatizing mental health in Germany.

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

(Results from the primary survey)



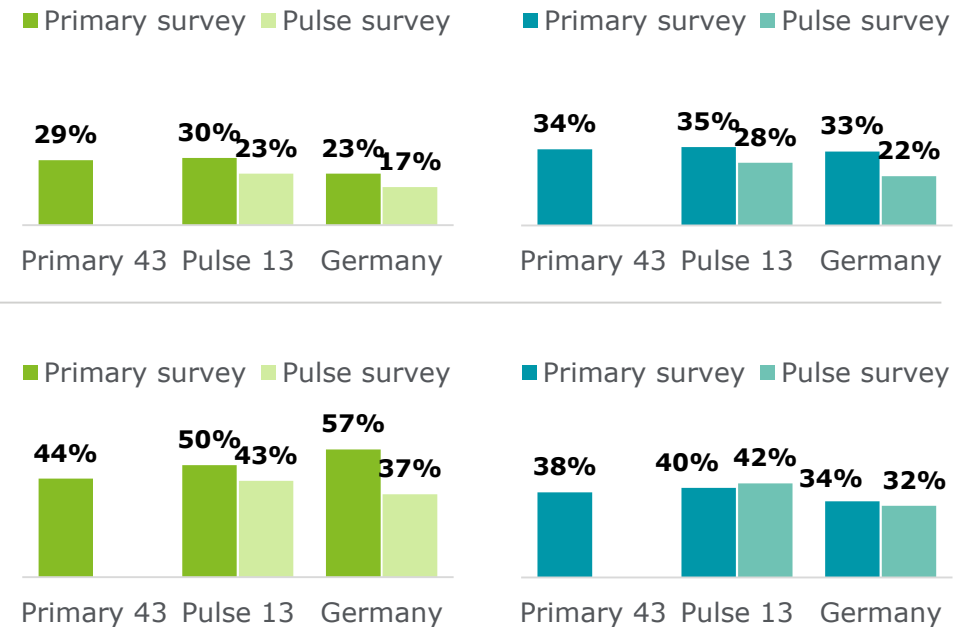
Q: Do you believe feelings of anxiety or stress are a legitimate reason to take time off from work? (i.e. as a sick day/leave of absence) *in full-time, part-time, temporary or unpaid employment

% Millennials and Gen Zs in Germany* 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



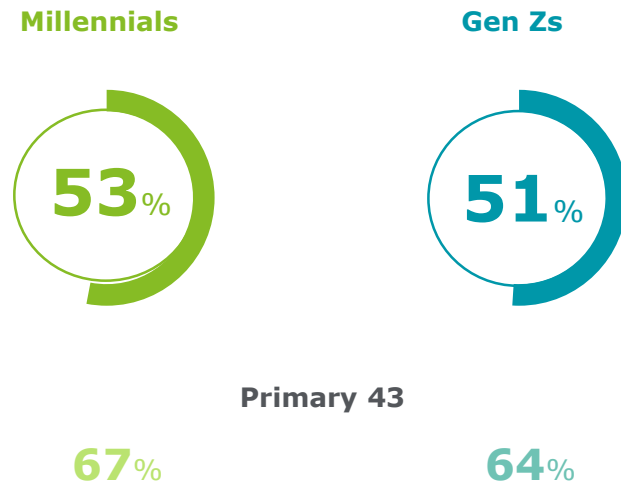
Q: in the past 12 months/since January, have you ever taken time off work (i.e. a sick day/leave of absence) due to feelings of anxiety or stress? (regardless of whether anxiety or stress was the reason you gave to your employer at the time) Q: When you took time off work due to feelings of anxiety or 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 half of millennials and Gen Zs said they often worry or get stressed about their financial situations. This is less than the global average.
- German millennials and Gen Zs were slightly less confident than the other pulse countries that their finances would improve in the next 12 months.

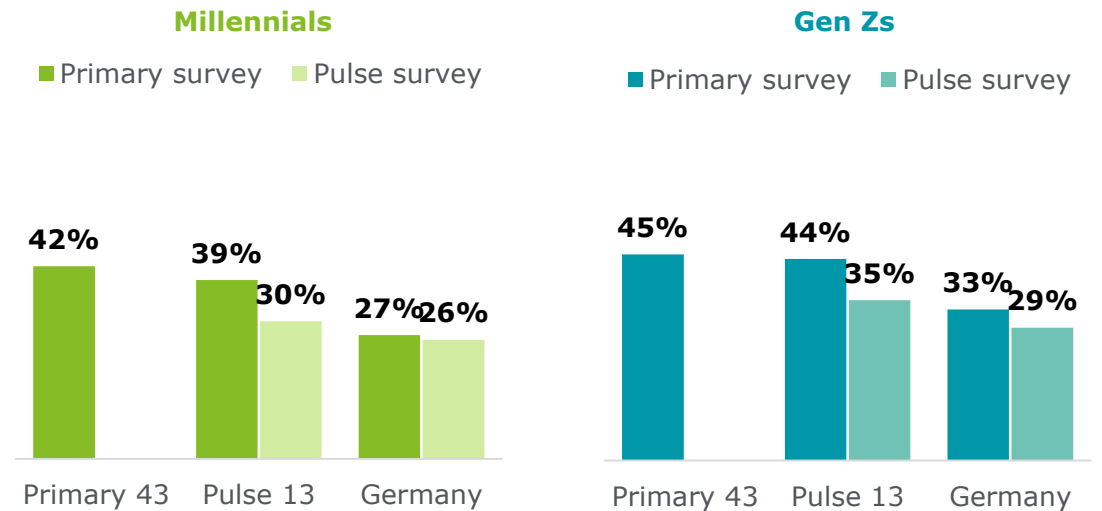
% Millennials and Gen Zs in Germany who often worry or get stressed* about their general financial situations

(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 Germany 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?



Finances

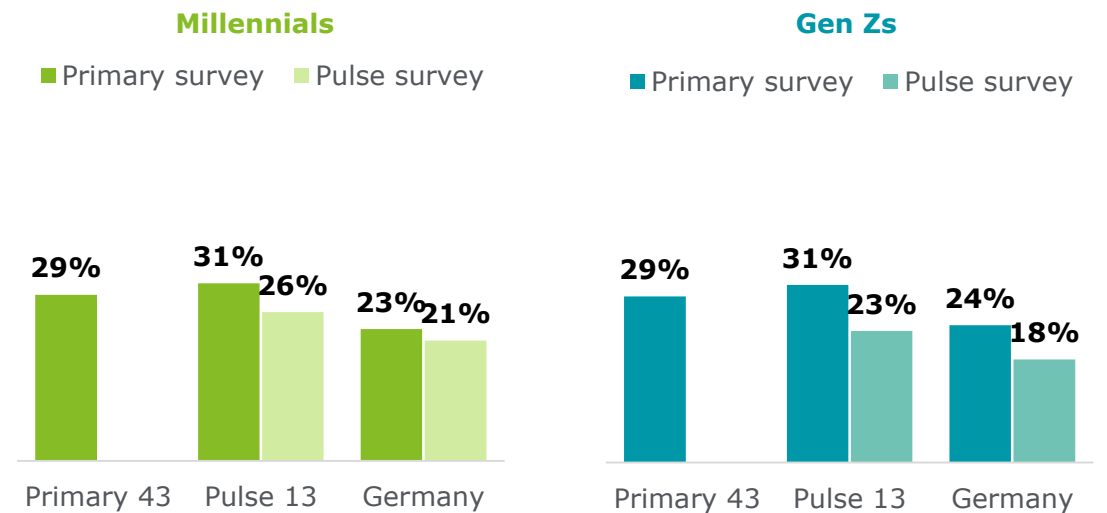
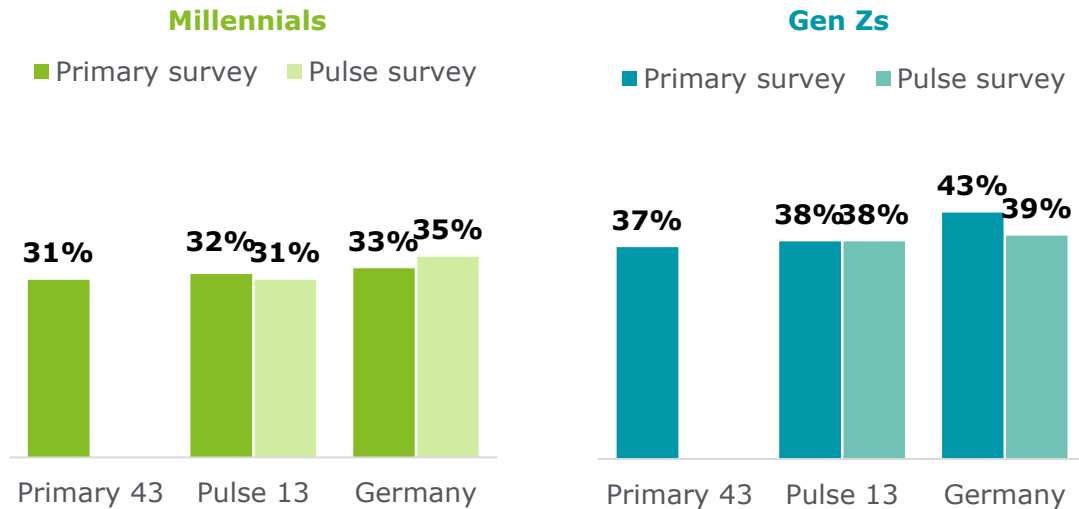
Key Highlights

- Around a third of German millennials and 39% of Gen Zs couldn't cope with an unexpected bill in the pulse survey (May). Interestingly, that figure went down slightly for Gen Z since December.
- Only around 20% of German millennials and Gen Zs have missed a payment in the pulse survey.

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

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

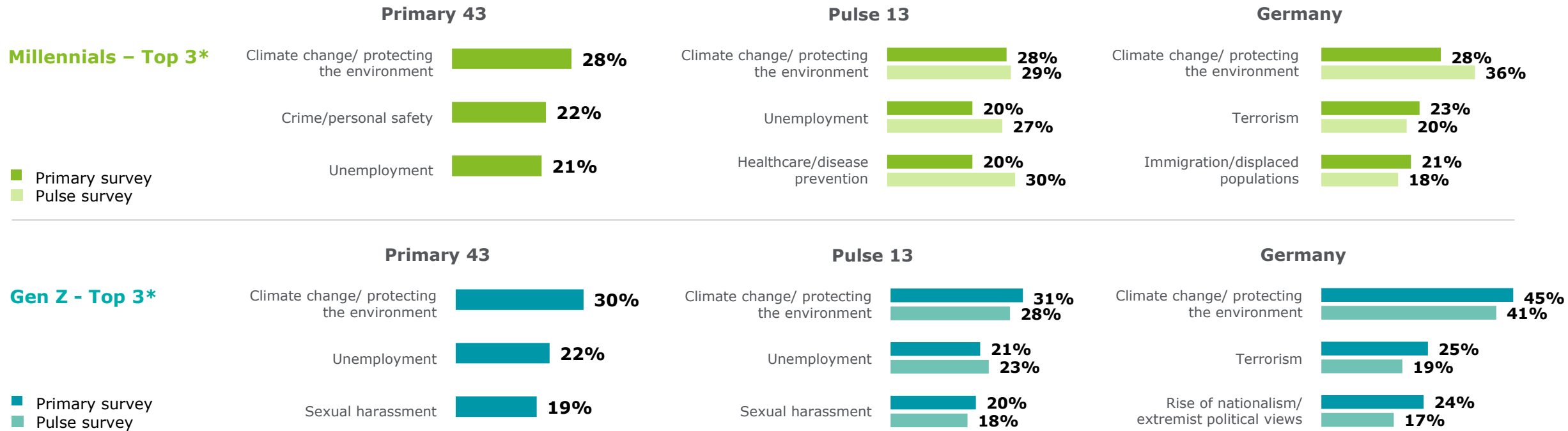
Q: Please indicate whether the following statements are true or false... I have missed paying or haven't been able to pay a bill/fixed payment in the last six months

World challenges

Key Highlights

- Climate change is a top concern for millennials and Gen Zs in Germany. Even as the pandemic unfolded around the world, this remained a constant.
- In fact, Germany's millennials were more likely to say they were concerned about climate change in the pulse survey than in the primary survey.

% Millennials and Gen Zs in Germany 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

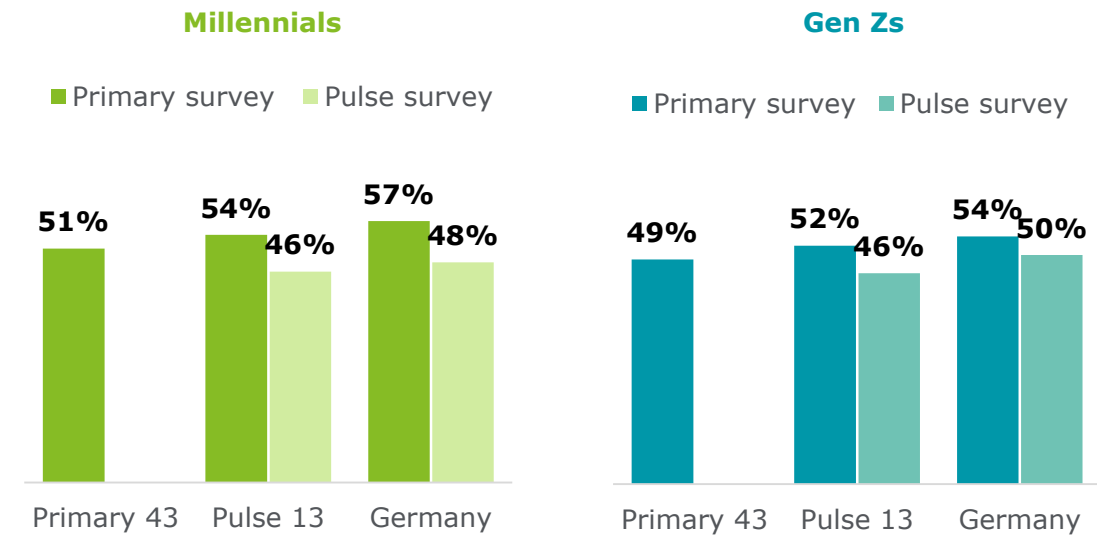


Environment

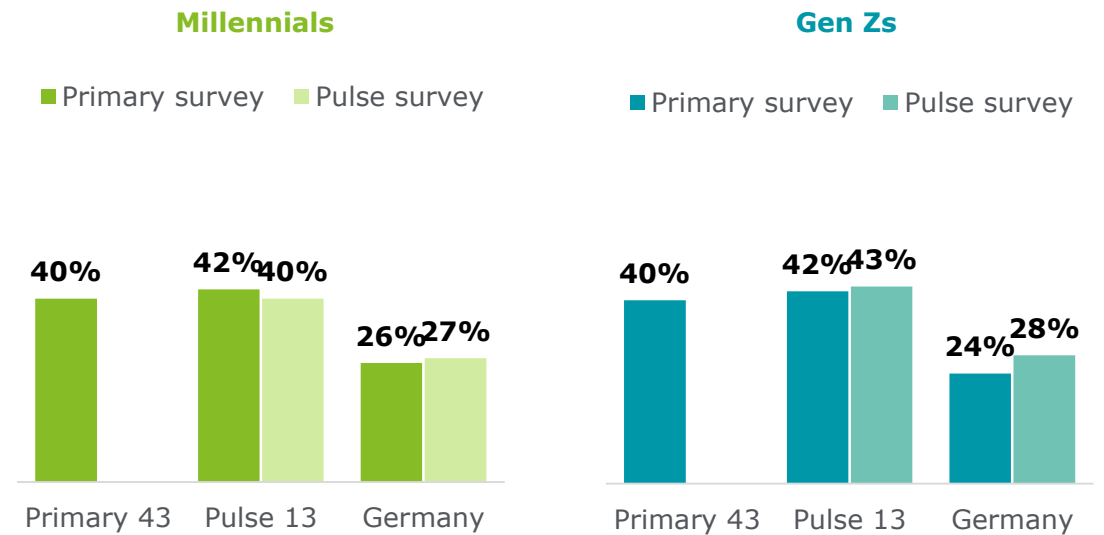
Key Highlights

- Fewer millennials and Gen Zs in Germany said in the pulse survey that we have hit the point of no return for the environment than in the primary survey (perhaps due to seeing the environment respond positively to the world essentially shutting down). This trend is consistent with the pulse countries.
- Germany's millennials and Gen Zs are less optimistic that the efforts to protect the planet will be effective than the other pulse countries. Only 27% of mills and 28% of Gen Zs are optimistic.

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



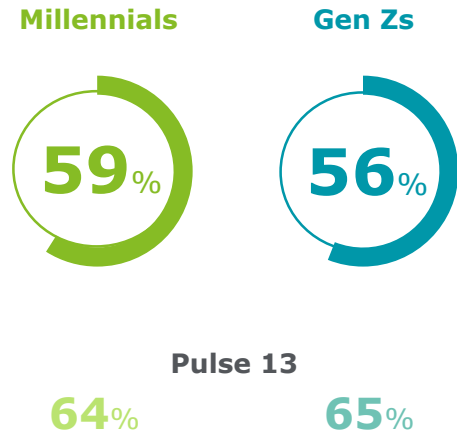
Q: To what extent do you agree or disagree with the following statements related to the environment? We have already hit the point of no return and it is too late to repair the damage
 Q: Are you generally optimistic or pessimistic that efforts to protect and sustain the health of the planet will be effective?

Key Highlights

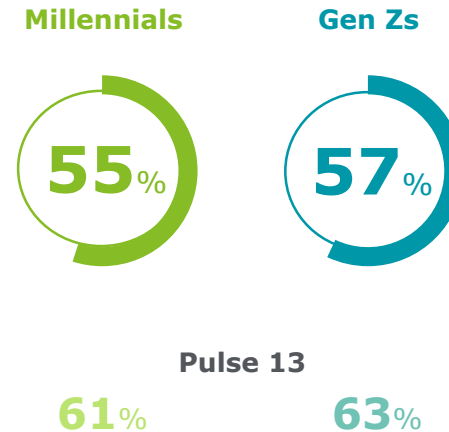
- Millennials and Gen Zs in Germany are slightly less likely than the pulse countries average to say that in the long term, environmental initiatives will become less of a priority for businesses and governments due to the pandemic, though more than half do still agree. Germany's millennials and Gen Zs are slightly less likely to say that they will continue to change their personal behaviour to limit their own impact on the environment.

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

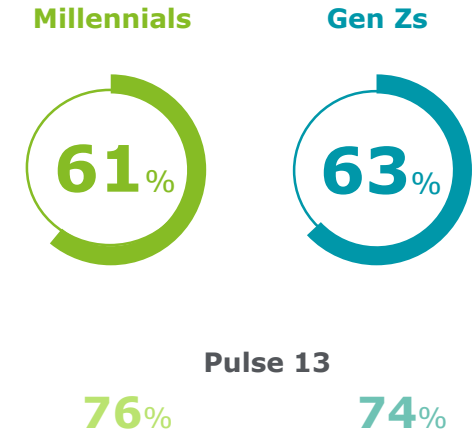
In the long term, environmental/climate change initiatives will be less of a priority for business because of the economic impact of the pandemic



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 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?

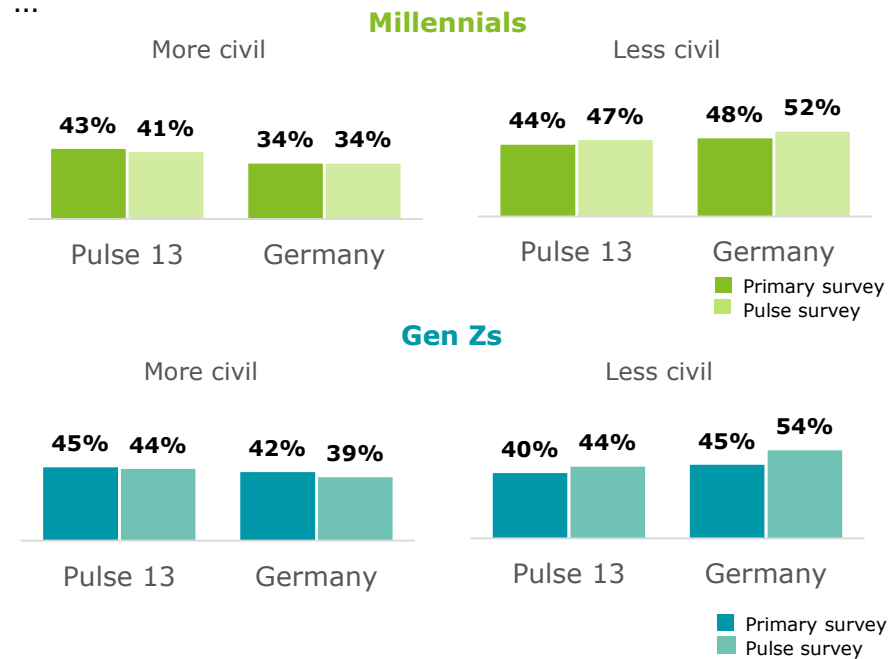


Sense of responsibility

Key Highlights

- More than half of Germany's millennials and Gen Zs think we are becoming less civil towards one another.
- From a personal responsibility standpoint, while more than half of Germany's millennials and Gen Zs say the pandemic has made them more sympathetic to their community and the world, and that it has moved them to take action and plan to take action once restrictions are lifted to improve their community, these numbers are below the pulse countries.

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

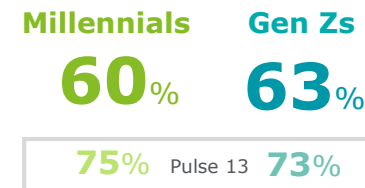


Q: If 'civility' is defined as treating others with respect and politeness, do you think that, as a society, we are becoming more civil or less civil toward one another?

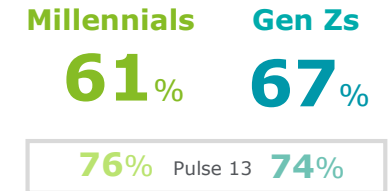
% Millennials and Gen Zs in Germany who strongly agree/tend to agree that...

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

...the needs of others in my local community

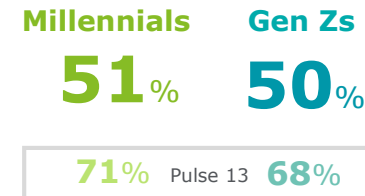


...the needs of different people around the world

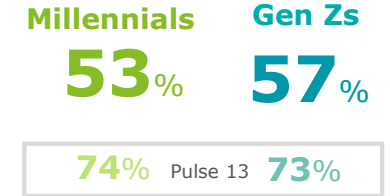


In response to the pandemic...

...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?

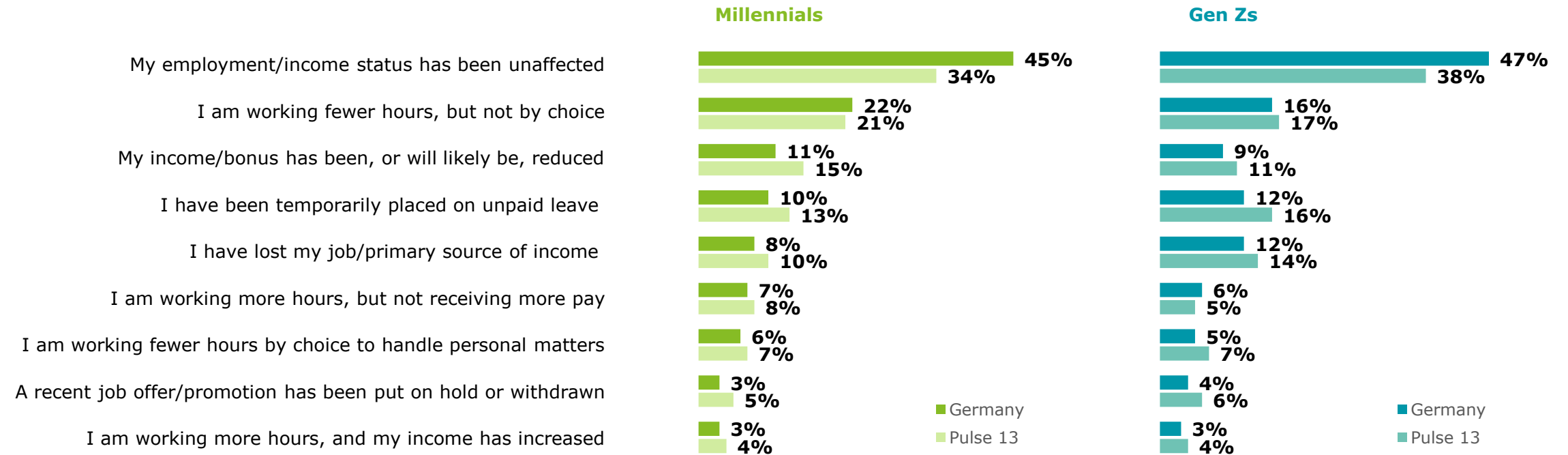


Work — current employment status

Key Highlights

- Millennials and Gen Zs were more likely than the Pulse 13 averages to have said that their employment status has been unaffected by the pandemic.

% **Millennials** and **Gen Zs** in Germany 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.



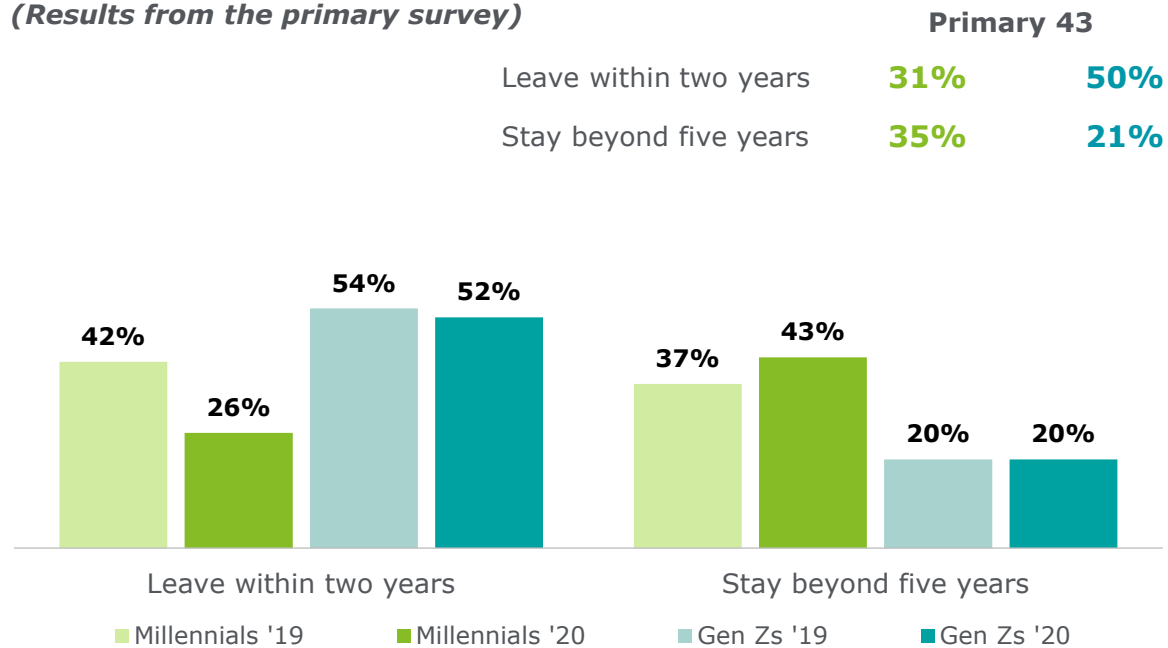
Work — loyalty

Key Highlights

- There was a dip in millennials wanting to leave their employers within 2 years from 2019 to 2020 (consistent with global findings), and a slight increase in those wanting to stay 5+ years. Millennials in Germany were actually slightly more loyal to their employers than the Pulse 43 average. Gen Z pretty much stayed the same year-on-year.
- More than 2 in 3 of Germany's millennials and Gen Zs said that they were pleased with the actions of their employer and that their employer had policies in place to support employees during the pandemic. 59% of Germany's millennials and 60% of Germany's Gen Zs said their employer's actions made them want to stay long-term.

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

(Results from the primary survey)



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 Germany* who strongly agree/tend to agree that...



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.

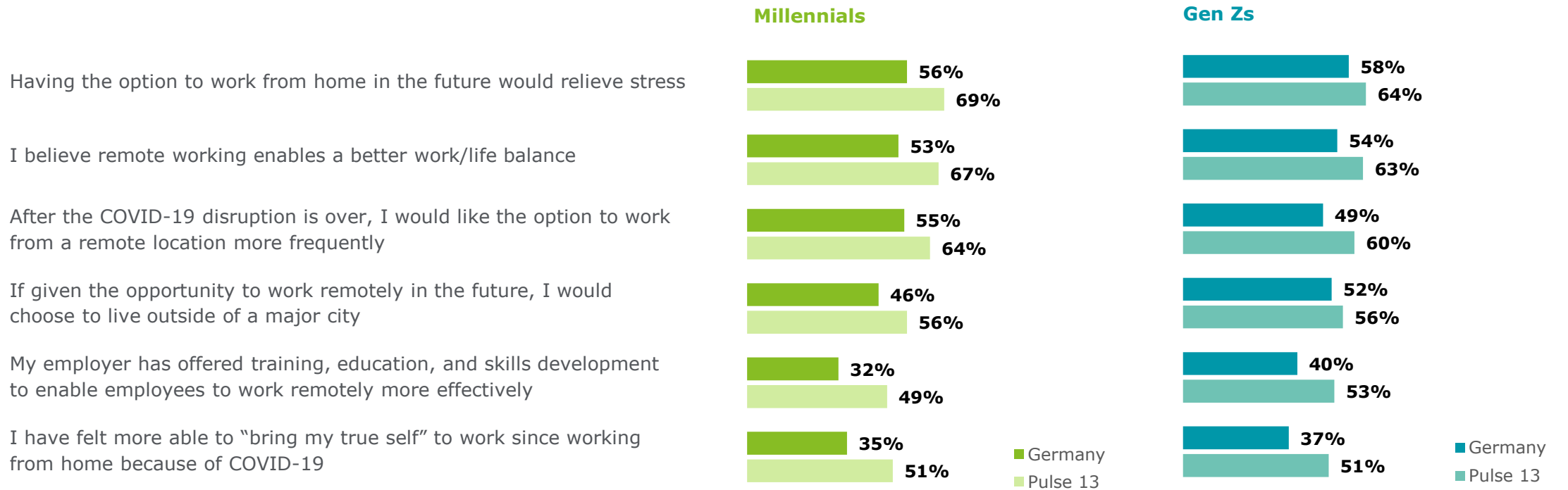


Work — future of the workplace

Key Highlights

- Across the board, millennials and Gen Zs in Germany were not as enthusiastic about working from home as the other pulse countries.
- Germany’s millennials were the least likely to say in the pulse survey that their employer had offered them training on remote work. Germany’s Gen Z’s were the least likely of their counterparts to say that remote work enabled them to bring their “true selves” to work.

% Millennials and Gen Zs* in Germany 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

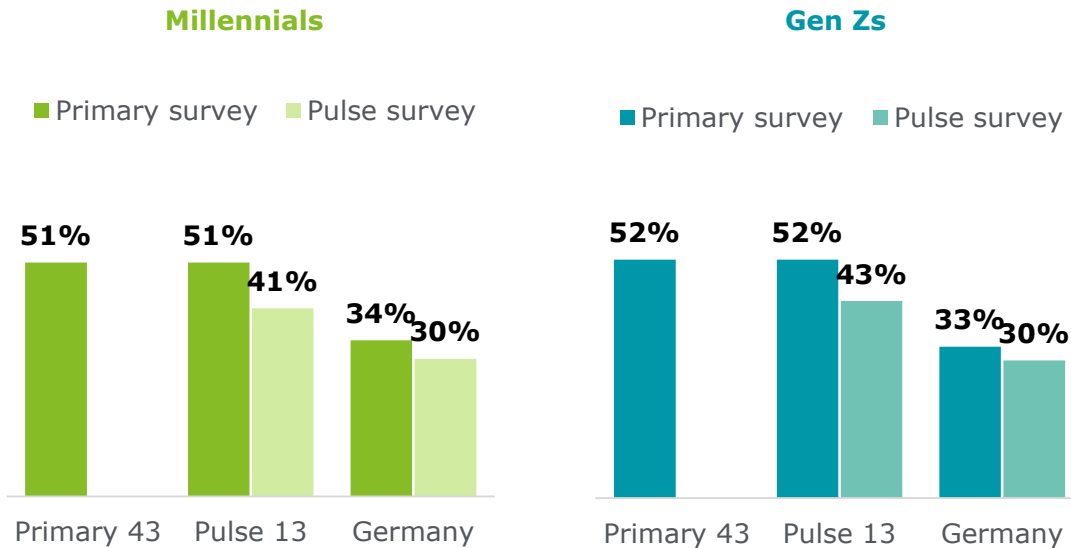


View of institutions - business

Key Highlights

- Fewer German Millennials and Gen Zs believe business has a positive impact on society than the global respondents.
- In the pulse survey, Germany's Gen Zs were the least likely of the pulse countries to say that businesses had put people ahead of profits. Further, only around half of Germany's millennials and Gen Zs said that businesses' actions during the pandemic showed a genuine commitment to society, less than the pulse country average.

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

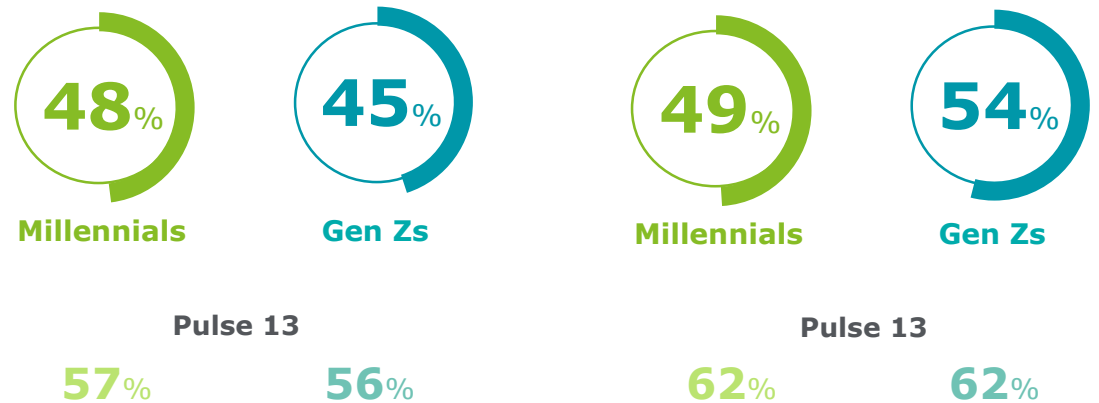


Q: Thinking about businesses in general around the world, what impact do you think they are having on the wider society in which they operate?

% **Millennials** and **Gen Zs** in Germany 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

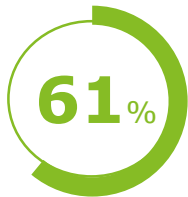
Key Highlights

- Around 2 in 3 millennials and more than half of Gen Zs in Germany were pleased with the speed of their government’s response to the pandemic, higher than the pulse country average.

% Millennials and Gen Zs in Germany 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



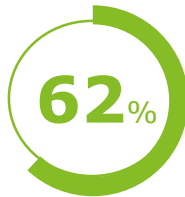
Pulse 13

53%

51%

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

Millennials



Gen Zs



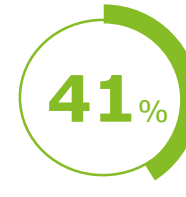
Pulse 13

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

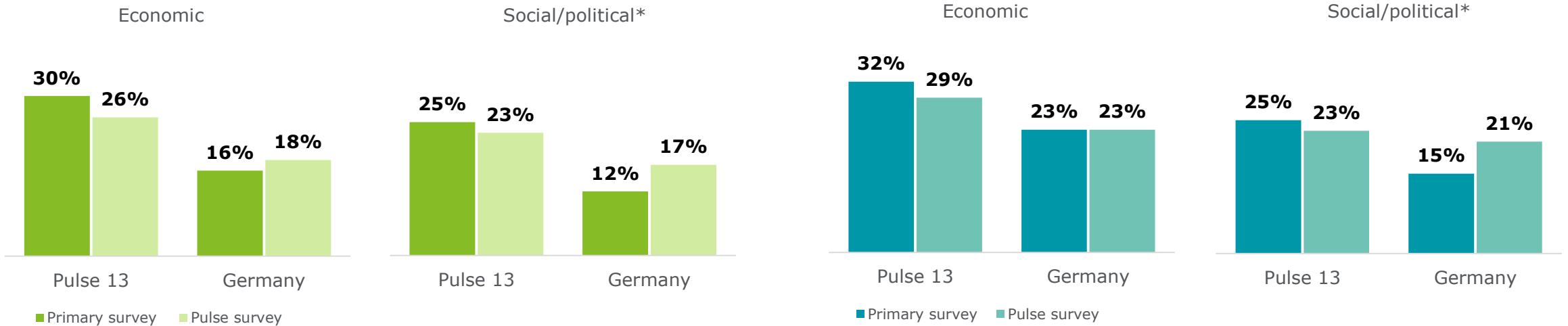
Key Highlights

- Only 18% of German mills think the economic situation will improve in their country in the next 12 months, and only 17% think the social/political situation will. Those are both lower than the pulse countries.
- Germany's Gen Zs were slightly more optimistic, but still low, with only 23% thinking the economic situation would improve, and 21% the social/political.

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

Millennials

Gen Zs



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

Germany

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.

- Economic situation
- Social/political situation
- Personal financial situation
- Environment
- Impact of businesses on wider society





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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)		GERMANY (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	-	267/115	-
In full-time, part-time, temporary or unpaid work	11,787/2,411	3,549/1,560	4,720/1,842	272/120	361/140
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	279/197	375/236
Have taken time off work due to stress	3,459/829	1,068/552	1,096/509	62/40	60/31

Please note base size below 50.