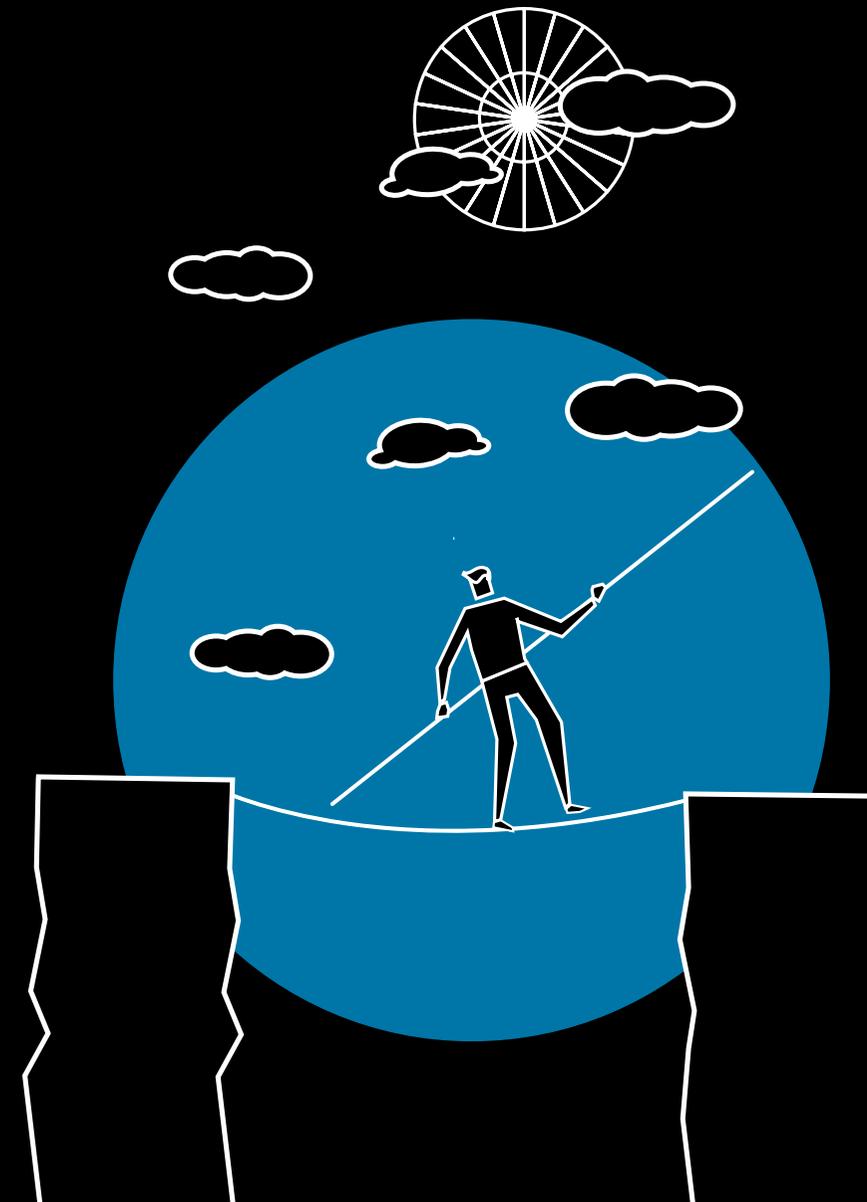


## **The Deloitte Millennial Survey 2019: Findings from Ireland**

Societal discord and technological transformation create a “generation disrupted”

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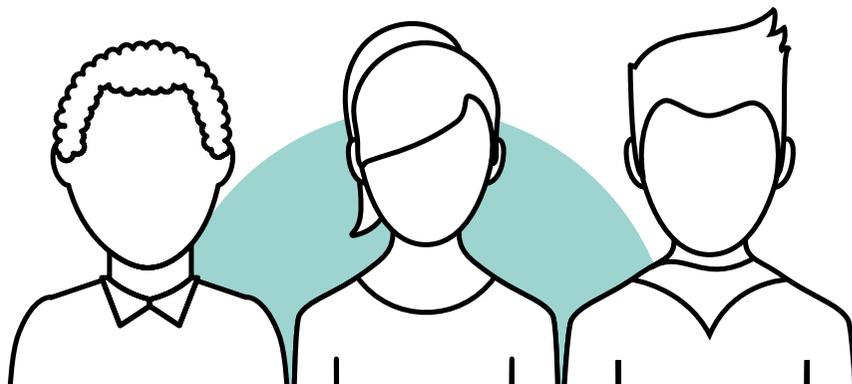


# Executive summary

## A generation disrupted

“We have less trust in employers because so many of our parents did lose their jobs, and they had been loyal to companies. We have less trust in the stock market because it crashed. And I think that a lot of us are worried that it is going to happen again. We are either putting off big life moments and keeping money in our savings [accounts], or we’re saying, ‘You know what? It could fall apart again tomorrow. Let’s travel the world.’”

Laura Banks,  
American millennial<sup>1</sup>



In business, disruption can promote innovation, growth, and agility. That, in turn, creates powerful and progressive business models, economic systems, and social structures. But unbridled disruption also has a downside, one that’s apparent in the 2019 Millennial Survey.

In this report, we reveal Irish millennials’ primary expectations and their top personal concerns. We uncover how Irish millennials are feeling about business and the world. We gather perspectives on topics such as future of work and discover millennial attitudes towards social media. We learn how millennials in Ireland measure success, whom they trust and what shapes their behaviour as consumers and employees. Most importantly, we explore what this really means for Irish organisations.

Some answers may surprise you. Some may even cause you to reconsider whether your priorities align with theirs.

**By 2025, millennials will represent seventy-five percent of the workforce and will be the largest generational cohort on the planet – so if you want to succeed, it helps to be on the same page.**

1. Mary Delach Leonard, “10 years after the Great Recession, millennials still struggle to catch up with the economy,” *St. Louis Public Radio*, September 21, 2018.

### Among this year’s key findings:

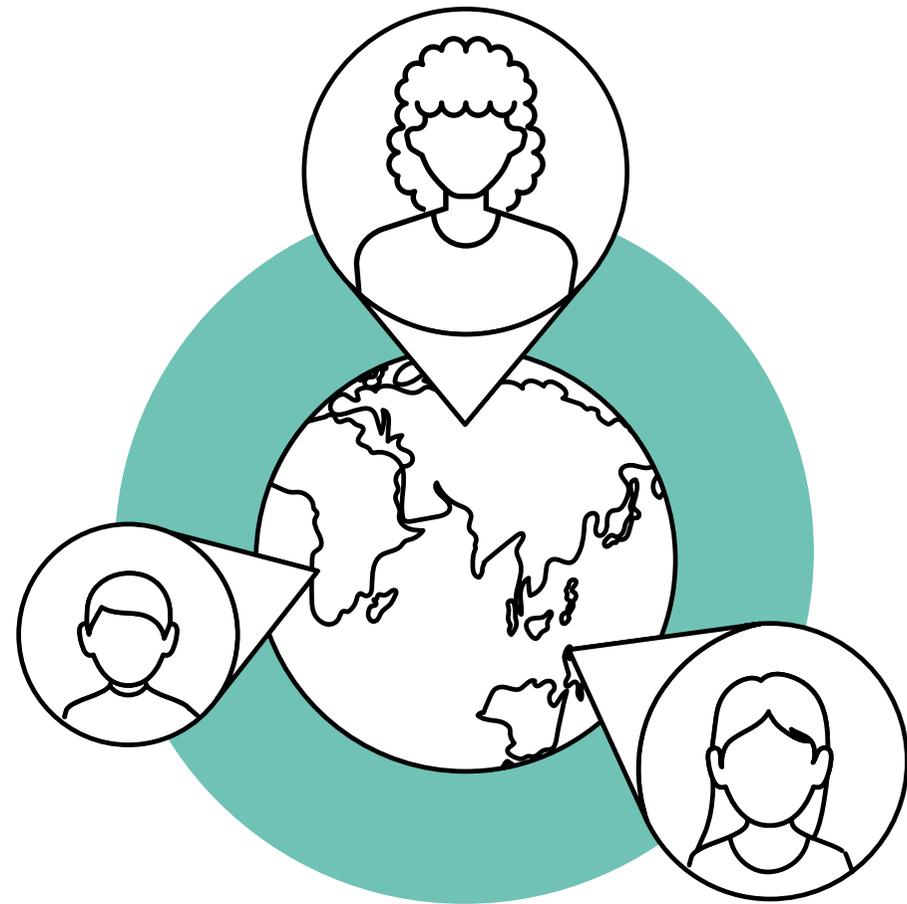
- **Millennials value experiences.** Their ambitions have evolved, so to attract and engage millennial talent, organisations must align the employee experience to suit millennial ambitions and values.
- **No loyalty if Millennials aren’t happy.** Millennials are open to different ways of working and have a diminishing sense of loyalty to organisations.
- **Millennials will walk if they don’t like your business practices and ethics.** Millennials will not hesitate to change their consumer relationships if they disagree with a company’s business practices or find them unethical.
- **Millennials have a love/hate relationship with social media.** Millennials continue to navigate complex relationships with social media and disruptive technology, as well as having concerns over the safety of their personal data.
- **Economic and social/political optimism is at record lows.** Millennials are most personally concerned about societal and environmental issues - meaningful work and making a positive social impact will therefore be critical to millennial engagement. Confidence in the economy, media, and Government continues to decline. This places an added pressure on businesses to step up, perform as social enterprises, and play a key role in solving the world’s biggest challenges.

# Survey Methodology

**Deloitte's 2019 global survey marks the largest to date, with 13,416 millennial respondents across 42 different countries and 3,009 Gen Z respondents across 10 countries. In Ireland, there were 300 millennial participants in total.**

Millennials included in the study were born between January 1983 and December 1994 and Gen Z respondents were born between January 1995 and December 2002.

The Irish participants are representative of the diverse and multi-faceted millennial cohort in Ireland. Irish millennial respondents are predominantly in full employment: sixty-nine percent of respondents have obtained college or university credentials with a further twenty-one percent currently in education. Currently employed respondents range across small, medium and large-sized organisations. Just over half of employed participants report working in privately owned businesses while the remainder work across public, state-owned, government and NGO sectors. Participants come from various levels of the organisation, from junior executive positions to senior leadership. Altogether, these respondents have defined the 2019 Irish millennial perspective.



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[To read the full global report, please click here.](#)

# Altered aspirations

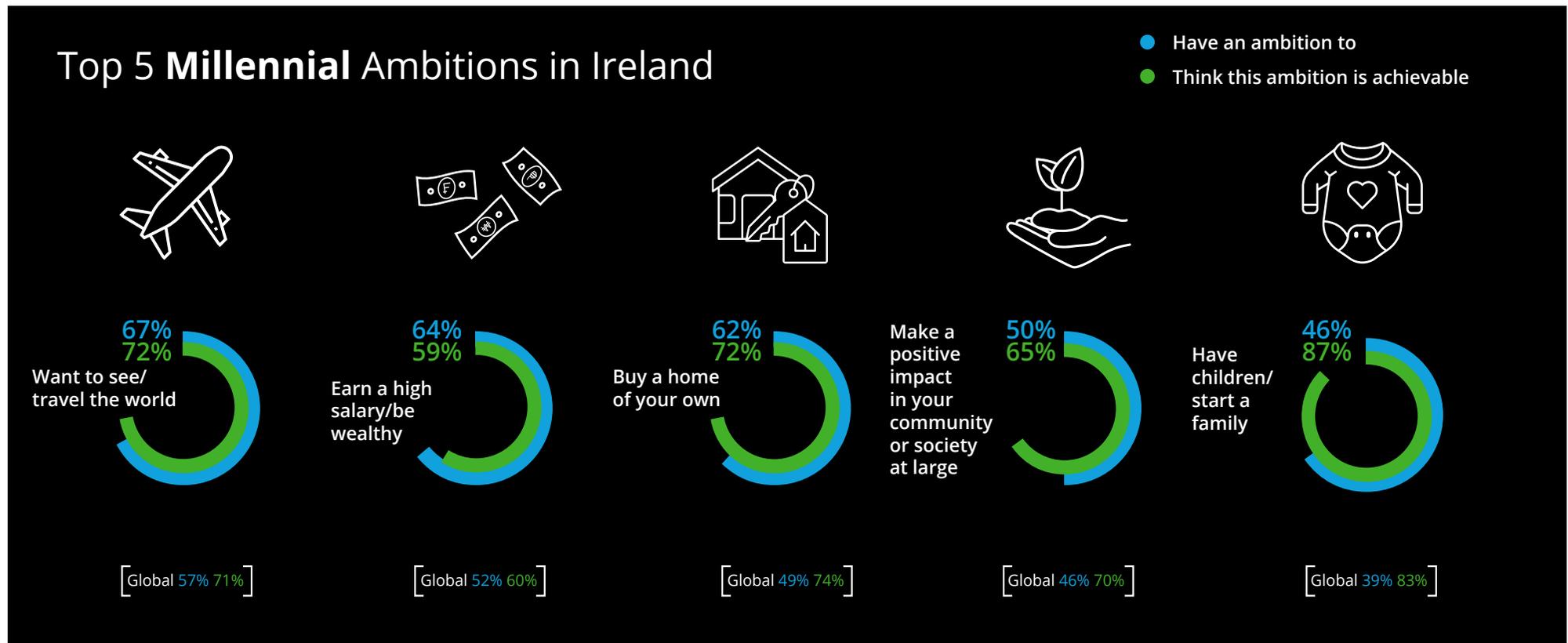
Every generation is shaped by its circumstances, and millennials are no exception. They are no less ambitious than previous generations. More than half want to earn high salaries and be wealthy. But their priorities have evolved, or at least been shaped by financial or other constraints.

This year, the foremost ambitions of Irish millennials surveyed included seeing and travelling the world, earning a high salary and becoming wealthy. It is interesting to note that Irish millennials are especially driven to travel the world (sixty-seven

percent), compared to the global average (fifty-seven percent). Earning a high salary and being wealthy ranked second (sixty-four percent) among ambitions, but came in last when respondents were asked whether their ambitions were achievable.

Traditional markers of success such as buying a home or starting a family still remain more relevant to Irish millennials in comparison to the global average, and they see these as achievable. Interestingly, owning their own home is a higher priority to Irish millennials than global.

Generally, millennials believe their ambitions are within their reach. Seven in ten who want to see the world think it is possible. Three-quarters who want to buy a home are confident they will be able to. Eighty-seven percent of those desiring families don't believe barriers will prevent it. And almost two-thirds who want to reach senior levels in their careers believe it's attainable.

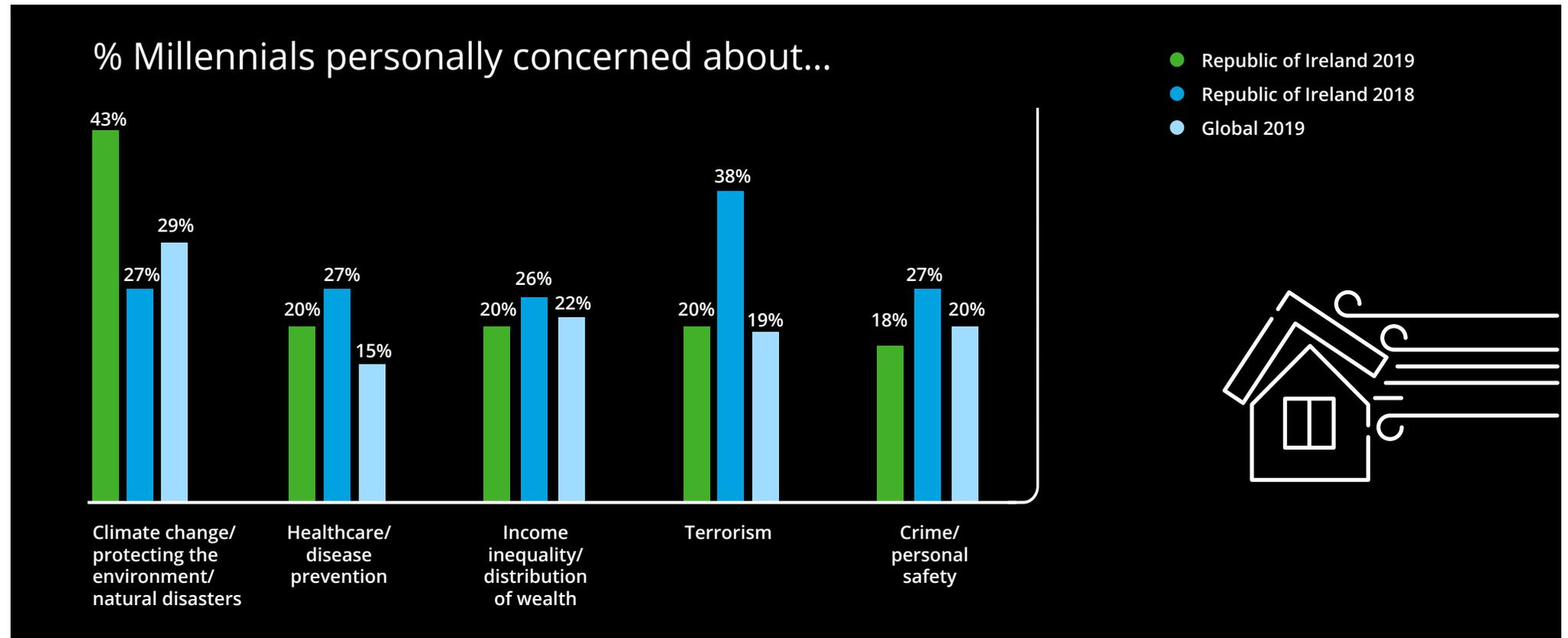


# View of the world

Every year we explore millennial concerns to gauge how they are feeling about current societal challenges. This year, forty-three percent of Irish millennials ranked climate change, protecting the environment and natural disasters as their main personal concern. This is an increase from twenty-seven percent in 2018. Irish millennials seem significantly concerned about this and although this is also a top global millennial

concern, Irish concern ranks much higher than the global average of twenty-nine percent in 2019. This indicates that Irish millennials will be looking for action on climate change and other environmental issues. Organisations and the government (indeed, the entire political system) should take note.

Healthcare and disease prevention, income inequality/distribution of wealth and terrorism also ranked as matters of personal concern, alongside crime and personal safety, yet the figures for these have all declined somewhat from the 2018 survey, while the focus on climate and the environment has surged.

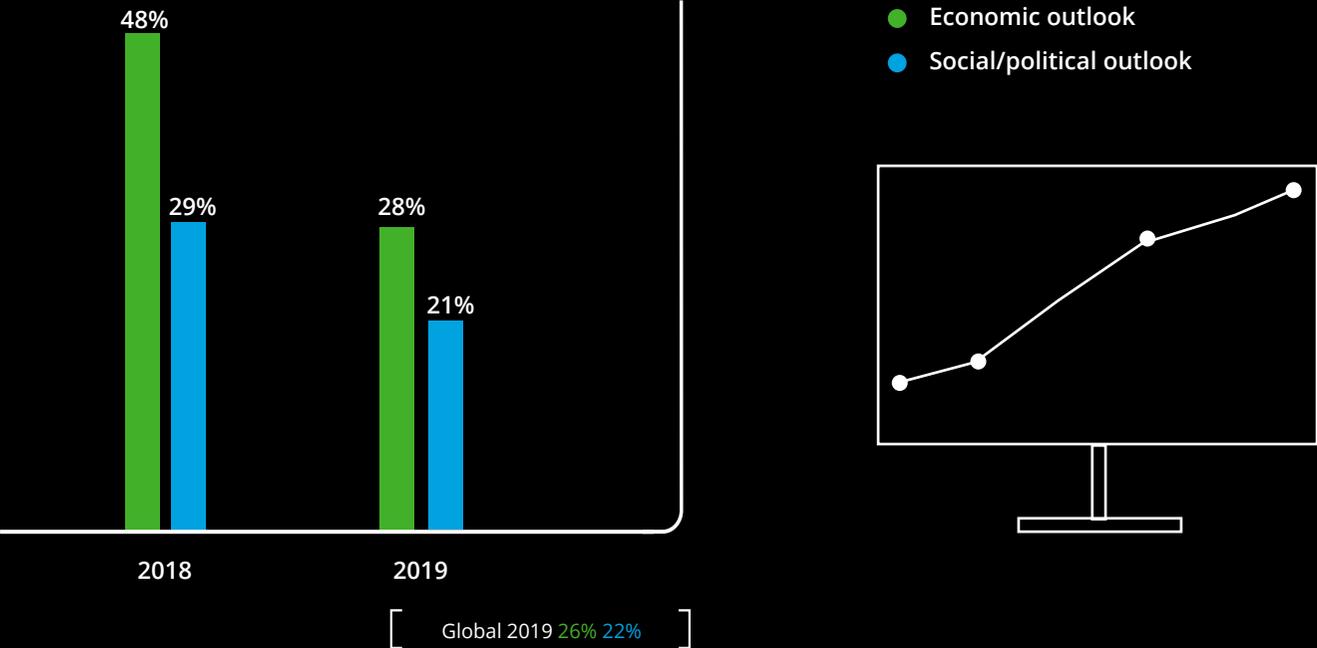


# Bleak expectations for the economy and social/political affairs

Over the years, a pattern has emerged which indicates an increasingly pessimistic millennial outlook on economic, social and political affairs. Although Irish millennials are slightly more positive than their global counterparts, the pattern of growing pessimism remains. Only twenty-eight percent believe the

economy will improve in the next twelve months, which is significantly lower than in previous years. There is even less confidence in political affairs with only twenty-one percent believing the social/political situation will improve in the next year.

% Millennials who say that the ... situation in Republic of Ireland 'will improve' in the next 12 months...



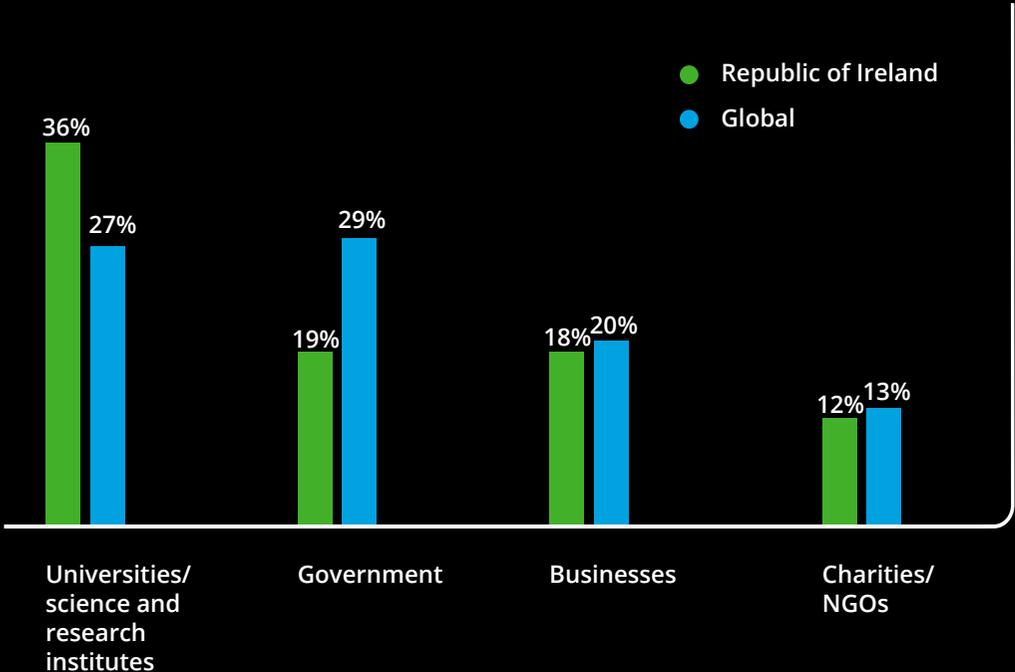
# Whom do they trust?

When it comes to the question of who millennials trust to solve the world's most pressing challenges, Irish millennials have even less trust in the Government than their peers across the globe do. Instead, they are more ready to put their faith in universities as well as science and research institutes.

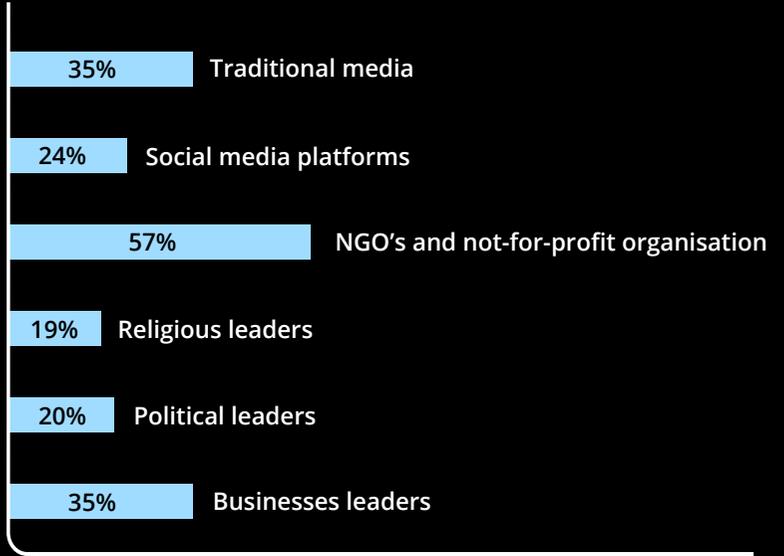
In Ireland and globally, a fifth of millennials surveyed view businesses, and also the Government, as the institutions best able to solve current societal challenges.

Irish millennials perceive leaders of NGOs and not-for-profit organisations as having the most positive impact (fifty-seven percent) while they continue to be distrustful of political and religious leaders and even see some of their actions as inhibitors of positive social impact.

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



% Millennials who say the following groups of people and organisations are having a positive impact on society



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

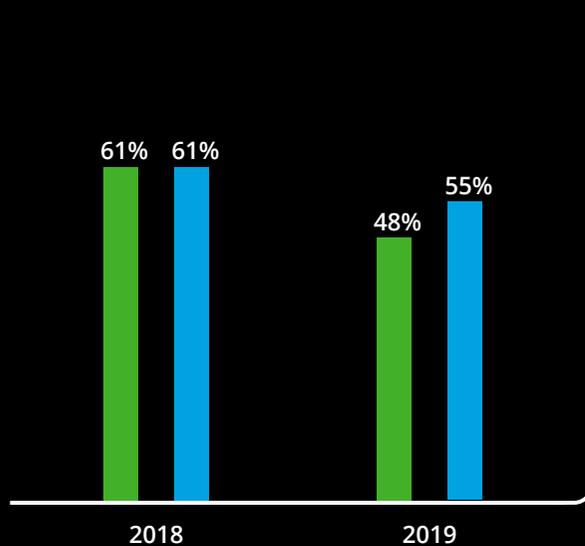
Even though there has been a slight decline since 2018, it is clear that millennials in Ireland still believe that businesses in general have a positive impact on the wider society in which they operate. However, it should be noted that the majority of Irish millennials still feel that businesses focus too much on themselves.

Organisations need to commit to ensuring a positive societal impact and focus on highlighting this commitment, if they are to win the respect, engagement and loyalty of their millennial employees and consumers.

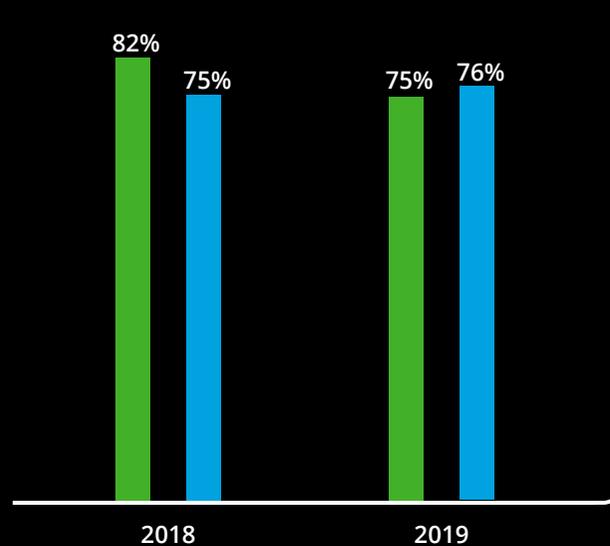
This commitment should take a tangible form – for example, providing paid leave or flexible work hours to support employees who wish to volunteer their time to support charities or social enterprises. This would enable millennials to balance work commitments whilst making an impact in their communities.

## View of business

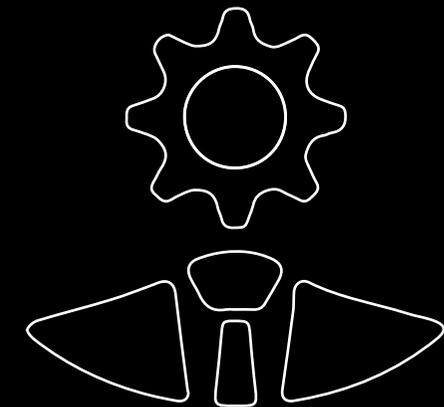
% who say businesses in general have a positive impact on the wider society in which they operate



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



- Republic of Ireland
- Global



# Disrupted, but also disrupting

As much as millennials may be a “generation disrupted”, their behaviours and choices are also profoundly disrupting business and society alike. Some of it is passive – the result of, for instance, delaying large purchases or having fewer children. In other, more proactive ways, these generations are shaking up established norms.

Millennials disrupt in many ways: as shown by their departure from the employee loyalty of their parent’s generation, and their inclination towards alternative forms of employment and flexible working situations. Furthermore, their ambitions, desires and needs evolve quickly and can change year on year, as the findings of our annual millennial survey report indicate. This means that organisations need to be aware and up to date with the ambitions, desires, needs and behaviour patterns of millennials in order to understand and plan accordingly.

Let’s take a look at the various ways Irish millennials are disrupting the world of work and the world of business as employees and consumers.



# Millennials as Employees

## Helping millennials reach their goals

Irish millennials are confident and driven. They have specific ambitions and believe they will achieve what they set out to do. Only thirty percent of respondents claimed to be 'satisfied' with their life as it stands, which indicates that the majority consider something might be missing. Organisations who set out to help millennials reach their goals could reap the reward of their efforts through enhanced loyalty and engagement – so, where can you begin?

**In order to appeal to the millennial employee, organisations should look at the following four areas:**

### 1. Compensation and rewards:

Organisations must ensure they maintain competitive salaries, as having other “perks” without ensuring a competitive salary is not sufficient. While a competitive salary is key, it is only a starting point; companies should also be exploring newer, more personalised ways of compensating and rewarding their employees. Many organisations see labour as a cost rather than an asset so they keep salaries and associated spending down.

In Deloitte’s 2019 Global Human Capital Trends survey, only eleven percent of respondents believed that their rewards strategy was highly aligned with their organisation’s goals.<sup>2</sup> Having a broader view of rewards is paramount to successfully motivating people – organisations should see the human capital spending involved in developing a rewards programme as a strategic investment rather than an expense. The results of the 2019 Global Human Capital Trends survey for Ireland showed that compensation, flexibility and learning and development as the most important rewards when engaging the alternative workforce.

### But how do you know what your people value as rewards?

It’s simple - ask them.

Standardised, basic rewards programmes do not create substantial impact; different employees will have different preferences. Do you know which is more important to your employees: finances or fitness subsidies, well-being or working from home, retirement or recognition?

### 2. Mobility:

Given that sixty-seven percent of Irish millennials have the desire to travel the world, organisations should shine a light on global mobility opportunities. Millennials will appreciate organisations that can adapt in order to accommodate employee ambitions – for example, they may show greater loyalty to an employer that provides them with opportunities for mobility or accommodates desires to take time out for travel.

### 3. Flexibility:

Organisations could also benefit by encouraging workplace flexibility. An organisation which puts processes in place to enable employees to be agile, collaborative and productive no matter where, when and how they are working will be sure to attract the millennial employee. Being aware of what millennials want, and providing opportunities and supports for mobility and flexible ways of working, can lead to skilled people entering and re-entering the talent life cycle at various stages of their careers.

### 4. Make a social impact:

Organisations cannot and should not ignore the importance of making a positive social impact. The survey confirms that millennials strive to make a difference to society, so they need to know that the businesses they interact with, whether as employees or consumers, have the same commitment to making a positive social impact as they do. The Government and public sector have an advantage here in that their purpose is already defined as making an impact on society. Organisations need to establish a sense of purpose in what they do, so that millennials feel their engagement with the business is making a meaningful difference to the community.

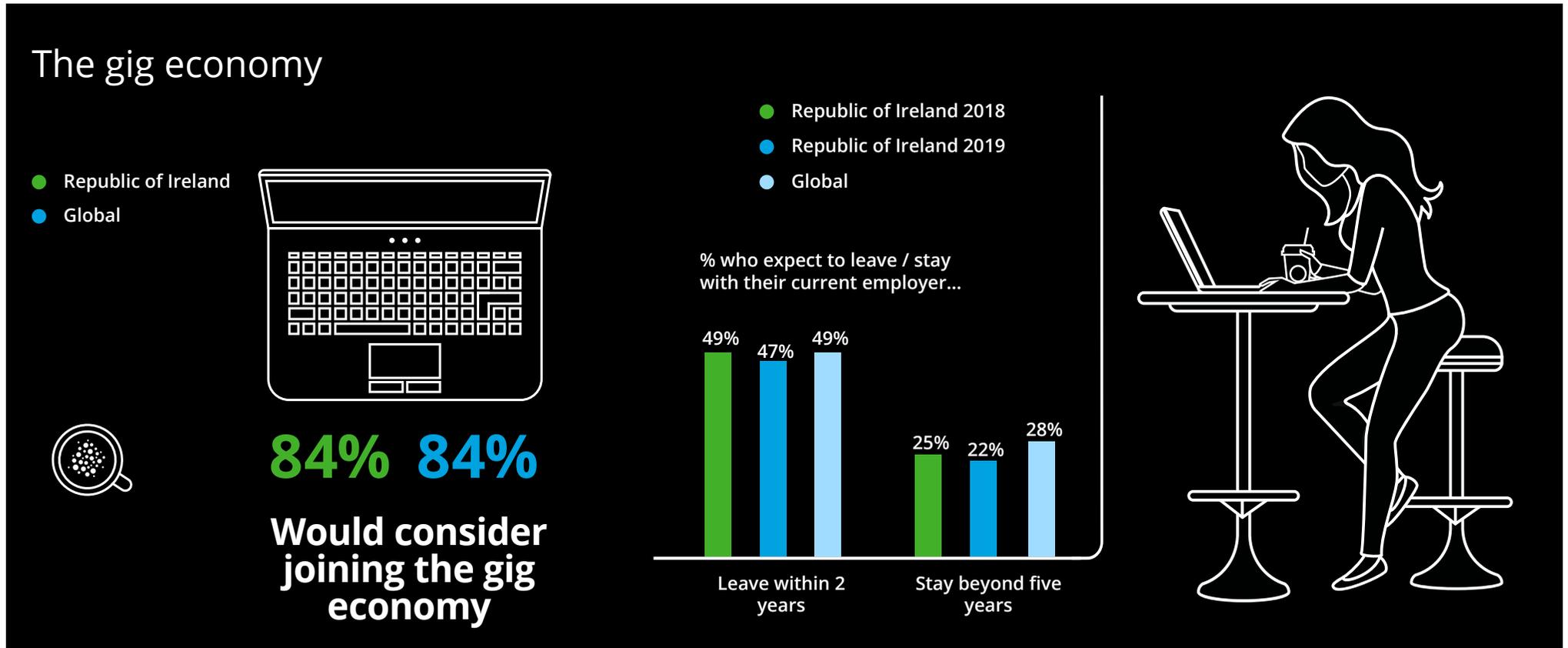


### Deloitte’s Reward Optimisation Tool

The tool uses actionable data and unique insights to discover employees’ needs and preferences, so that you can tailor your rewards programme in a way that maximises benefits and improves employee satisfaction. Contact our Human Capital team today to find out more.

<sup>2</sup>2019 Deloitte Global Human Capital Trends Survey

# In the workplace



This generation of professionals harbour a diminishing sense of loyalty compared to previous generations. Only twenty-two percent of Irish millennials plan to stay more than five years with their current employer, while forty-seven percent of respondents expect to leave within two years. Furthermore, four in five millennials (in Ireland and across the globe) would consider joining the gig economy (workers who are paid by the task or microtask to complete a specified piece of work.)

This is a significant shift compared to results from the 2017 survey, which showed sixty-nine percent of millennials in Ireland wanted permanent full-time employment; demonstrating how the workplace is changing and the needs of millennials are disrupting organisations.

The added disruption of employee turnover can have a negative impact on employee engagement and accentuate the problem

of attrition. Consequently, organisations will need to prioritise employee engagement as a business issue.

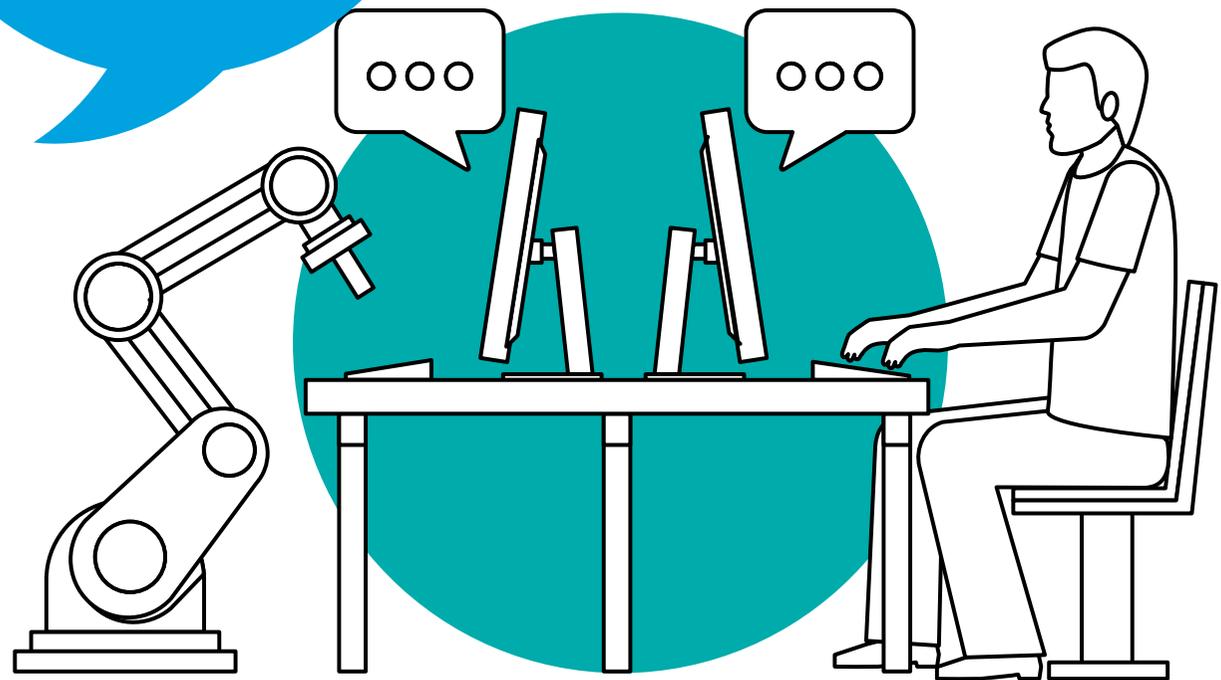
In Deloitte's 2019 Global Human Trends survey, eighty-four percent of respondents rated 'employee experience' an important issue, with twenty-eight percent identifying it as one of the three most urgent issues facing their organisation in 2019. Last year, we reported that flexibility, diversity and

inclusion were critical to employee engagement.<sup>3</sup> As a starting point, organisations should evaluate how to become a more inclusive and Adaptable Organisation, in order to reduce turnover and attrition rates, improve employee engagement and provide a superior employee experience.

Although retention and engagement can be improved through focus and action, Irish businesses must also be aware of the general trend towards increasing turnover within the talent life cycle. While making strides to improve employee engagement and experience should be a priority, it is also important to begin planning for the new normal: higher turnover rates and a more mobile workforce. Last year we noted that despite the millennial getting older, the rate of turnover was still rising.<sup>4</sup> This generation continues to be different, and a competitive job market, with near full employment exacerbates this trend.

Organisations must come to terms with a new type of employee relationship – one that may be more casual, short-term, or cyclical. Organisations and their employees will need to adapt to become more comfortable with the new realities of work and employment. Organisations and individuals should re-evaluate what they expect of the workforce, employment and the entire employee experience. Translating awareness of these trends into action will drive higher engagement and, most importantly, ensure that the work that is needed gets done.

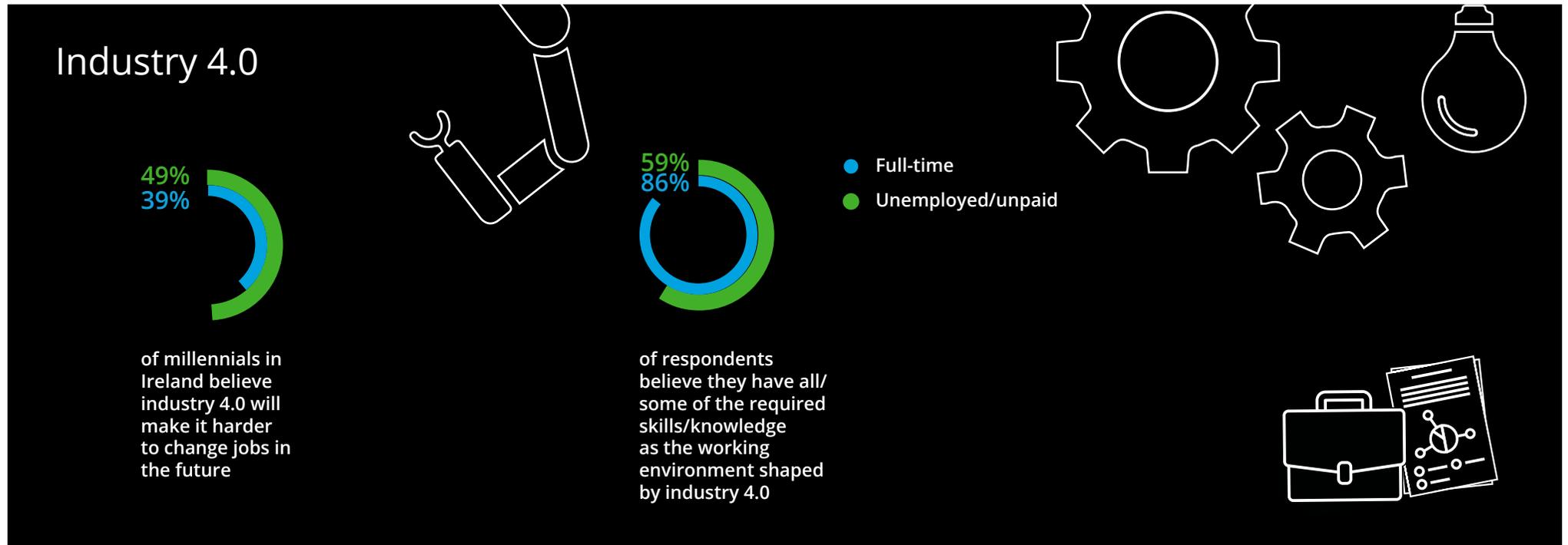
**The Adaptable Organisation is a fundamental shift in operating and management philosophy that enables large-scale global organisations to operate with a start-up mindset and drive modern people practices that enable enterprise agility through empowered networks of teams.**



<sup>3</sup> [Deloitte 2018 Irish Millennial Survey Report](#)

<sup>4</sup> [Deloitte 2018 Irish Millennial Survey Report](#)

# The case of Industry 4.0



Although Industry 4.0 remains a concern for millennials, they have more faith in their capability to adapt than they did in 2018 (when only twenty-two percent of employed and unemployed millennial respondents believed they had the necessary skills required for Industry 4.0).

The nature of work is changing and the pace of technological, social and economic changes can be a source of anxiety among millennial employees. Many jobs now require elements of a traditional job, augmented with a complex set of technical

and human skill-sets. This movement from jobs to “superjobs” has changed the nature of how some millennials work today. Increasing advances in artificial intelligence (AI), and cognitive technology have led to jobs becoming more machine-powered and data-driven. However, inherent ‘human’ skills such as critical thinking, empathy and decision-making, are just as important for millennials to acquire, develop and maintain.<sup>5</sup>

Older millennials in the workforce are using technology that did

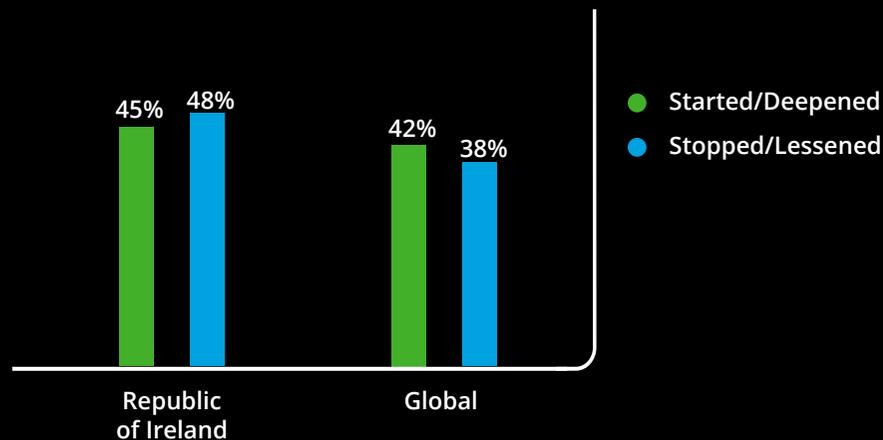
not even exist at the dawn of their careers, for example online cloud platforms and collaborative tools. Many Irish millennials believe that Industry 4.0 will make it more difficult to get or change a job in the future and this concern is even higher among those still in education, not working or in unpaid work. One way organisations can attract millennials is to provide opportunities for learning that will prepare them for Industry 4.0 employment and equip them to deal with technology disruptors and changes to ways of working.

<sup>5</sup>[Leading the social enterprise: Reinvent with a human focus. Irish insights from the 2019 Global Human Capital Trends Survey](#)

# Millennials as consumers

## Money talks

**% millennials who as a consumer changed their relationship with a business because its products or services impacted the environment or society**



Millennials may not be loyal in comparison to previous generations, but they are certainly consistent in their values. Millennials tend to demonstrate consumer loyalty when organisations take real action to align with their values, and can be reluctant to financially support organisations with whom their values clash.

Forty-five percent of Irish millennials reported that they have

in the past started or deepened a relationship with a business due to the societal and environmental impact of its products or services, while forty-eight percent confirm they have stopped or lessened a relationship with a business as a result of the same. This indicates that millennials have a strong desire, as consumers, for businesses to prioritise the social impact of their products, brands and organisations. The absence of these could directly affect the bottom line.

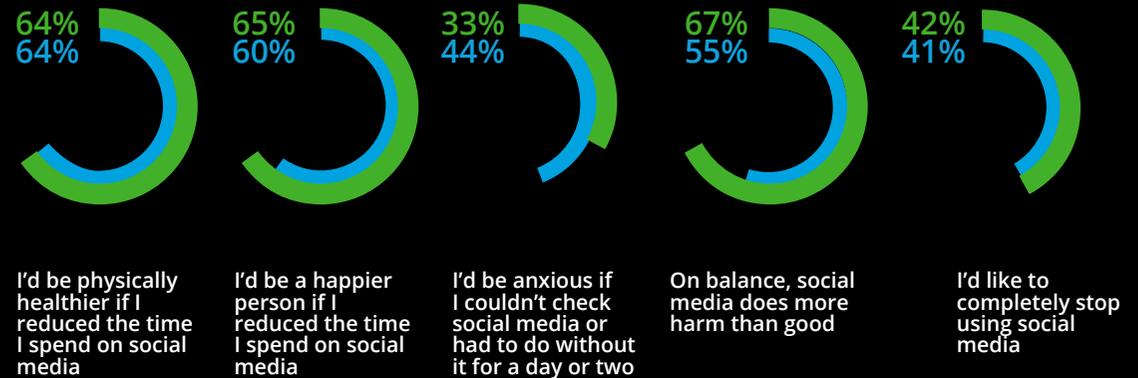
In order to remain competitive in the future of work environment, organisations should steer away from focussing solely on financial performance and should instead prioritise a more holistic view of their purpose which encompasses a consideration of societal impact. This will improve customer experience by shaping positive perceptions of the firm and drive consumer loyalty as well.

# Social media: friend or foe?

Interestingly, although millennials are the first generational cohort of digital natives, they remain rather distrustful and apprehensive of the consequences of their digital behaviours. Irish millennials view social media as harmful with a majority believing reduced usage would have a positive effect on their physical and mental health.

Although almost half of Irish respondents have the desire to stop using social media, a third recognise that they would be anxious if they reduced their access. It seems that, from an Irish millennial perspective, even though the cons of social media outweigh the pros, millennials are unsure how to reduce their usage, and recognise that it is difficult to 'unplug' from social media and dial down their levels of online interaction. Their relationship with these platforms is complex and they struggle to identify practical next steps.

## % Millennials who agree that...



● Republic of Ireland  
● Global

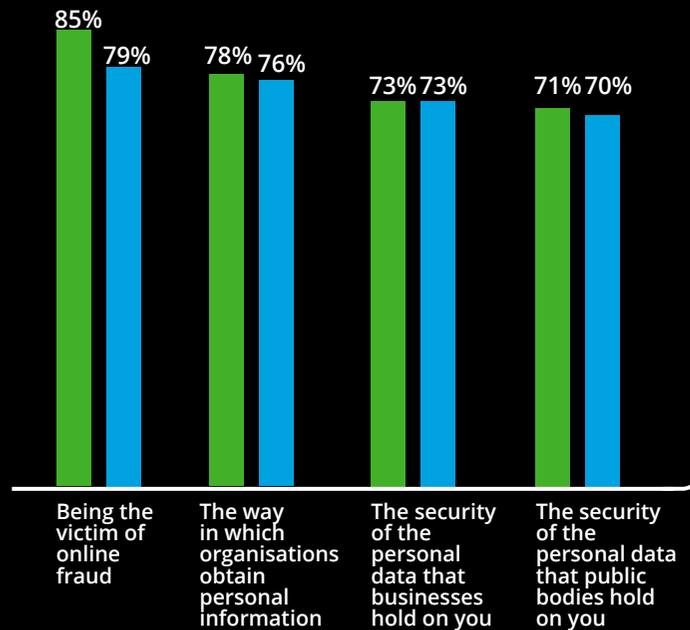


# Concerns about online personal safety

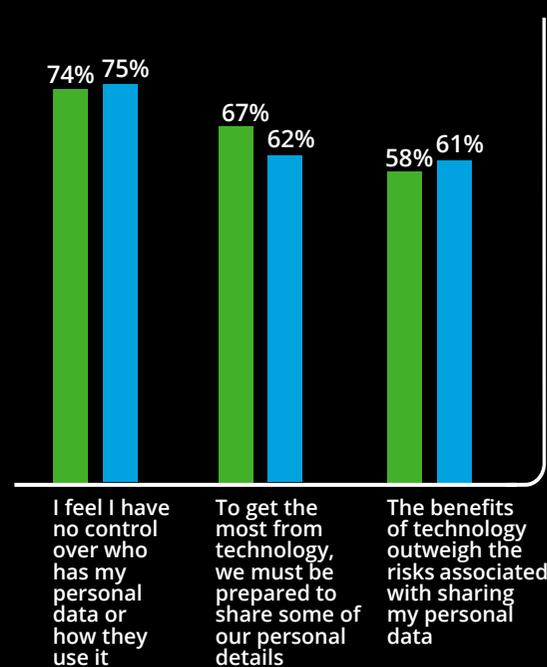
From a consumer perspective, organisations need to support their customers through this journey and anticipate ambivalent reactions to strategic social media usage and online engagement among this generational cohort.

The complex relationship millennials have with social media is a clear reflection of the effect disruption has had in both advancing and challenging the way we live our lives.

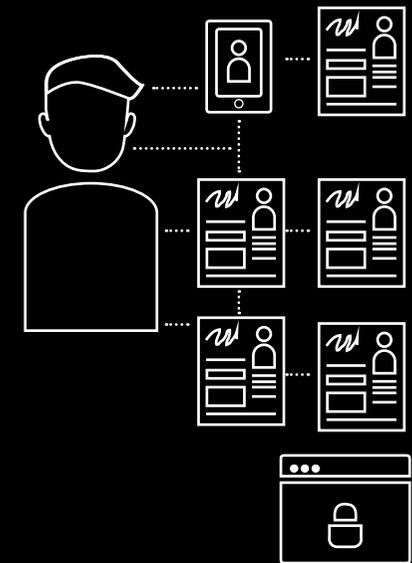
## % Millennials concerned about...



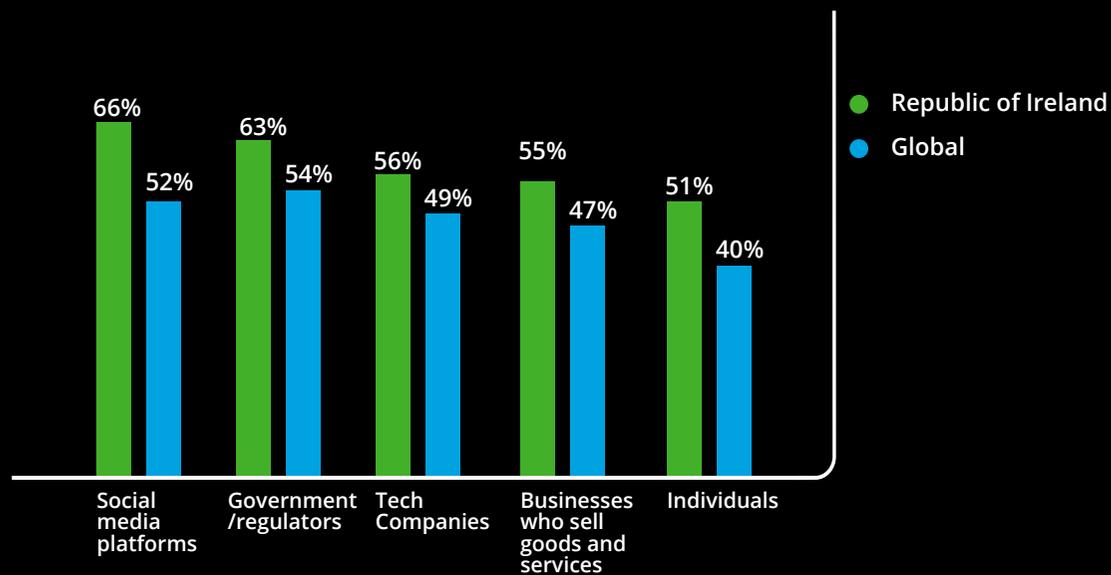
## % Millennials agree...



- Republic of Ireland
- Global



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



Social media usage is only one of many linked digital behaviour concerns. Another major issue is the use of their personal data. Recent scandals across the globe relating to personal data abuse and leaks are perhaps a contributor to the fact that seventy-four percent of Irish millennials feel they have no control over who has their personal data and how they use it. A further eighty-four percent of millennials in Ireland worry that they could be the next victim of online fraud. In addition to this, other concerns include how organisations come to obtain personal information, how secure the data they obtain is, as well as the security levels of personal data obtained by government bodies.

In spite of these concerns and increasingly onerous obligations surrounding GDPR, sixty-two percent of Irish millennials still agree that the sharing of personal data can lead to getting the most value out of technology. Therefore, millennials can be torn between what is valuable and what is safe. They are unsure of how to behave digitally, and of what risks are worth taking.

*Is sharing personal data worth the risk of online security breaches or fraud?*

*Is spending time on social media worth the potentially harmful health effects?*

The questions posed are difficult to answer, and so it is worth organisations' time to consider their approach in relation to social media, data, online protection and security.

Millennials expect all businesses, especially technology businesses and social media platforms, to make more of an effort in protecting people's data and online security. According to them, the onus is less on individuals than it is on businesses, regulators, the platforms and the government.

# What you can do as an employer or as a seller

Overall it is important for organisations to be aware of the characteristics and attitudes that define and inform the perspective of millennials in Ireland, in order to be able to engage effectively with this generation, to meet their distinct expectations as both employees and consumers, and, ultimately, to build trust.

Based on the insights provided in this report, here are four recommendations to help you improve your relationship with the many millennial stakeholders of your organisation:

## 1. Reinvent or build your organisation as a social enterprise

### Be a social enterprise

In order to attract, retain and engage millennial employees and consumers, organisations should continue to strive to reinvent themselves as social enterprises, putting social issues to the fore. Establishing your company as a social enterprise will result in a better alignment with millennial expectations and may result in access to new markets, new opportunities, improved employee engagement and customer loyalty, and superior financial performance.

### Communicate your social purpose and company values

In the war for talent, organisations battle for the best employment brand. A more substantial approach for attracting and engaging millennials may be to make an impact that actually matters to them, and to communicate this accordingly. Millennials will respect companies with a wider social purpose: research indicates that social enterprises benefit from superior employee engagement—especially among millennial employees. They see their values and priorities aligning with those of the organisation and their concerns over social and environmental issues being heard.

Becoming a social enterprise will also drive customer loyalty. Millennials may not tend towards employee loyalty; yet, as consumers, they speak with their wallets. If organisations are looking to attract millennial consumers, they should focus on their societal and environmental impact. Millennial consumers are not afraid to buy with their conscience and their perception of a company's values and commitment to social or environmental issues has a direct effect on their purchasing decisions.

## 2. Design employee experience and tailor your rewards programme to align with millennial desires

### Create a positive employee experience

Millennials value experiences, and this consideration should be at the core of all aspects of your organisation's talent acquisition and employee engagement strategies – right through to ways of working, learning and development, and reward. Millennials want to travel, learn and help their communities – so having a positive employee experience is crucial.

### Provide learning and upskilling

Businesses need to make work meaningful for their employees and create a continuous stream of learning and development opportunities. Create a learning environment, as growth opportunities play a major role in attracting top talent. Create cross-functional teams, ensure a positive work environment, build trust in leadership and explore how you can provide further opportunities for growth. These are key to improved employee experience.

Develop a talent development strategy that includes a plan for upskilling employees so they feel prepared for the change that Industry 4.0 is continuously introducing.

## Tailor your rewards and prioritise employee compensation

Flexibility and compensation are the two most important rewards elements that engage the alternative workforce, and one of the main barriers experienced by companies when changing their reward strategies is a lack of understanding of what their employees' value. Employees are looking beyond traditional rewards and are equally focussed on wellbeing, development and recognition.

Refresh your rewards programme by carrying out a gap analysis study on current employee values and satisfaction with the current programme. The more personalised to employee needs, the more embedded they will become in the organisation. Embrace financial and non-financial rewards such as extended leave so that millennials can fulfill their travel-related ambitions.

## 3. Ensure flexibility is central to everything you do

### Adopt flexible ways of working

To retain and engage millennial talent, companies need to establish an employee proposition that is suitable and attractive for such a diverse generational cohort. Flexible working arrangements are therefore essential in order to cater for the varying needs of the millennial demographic. Organisations need to champion flexible working and look at where they can take advantage of the growing willingness to embrace the gig economy ways of working.

### **Embrace alternative talent models and the open talent economy**

In order to source the top talent, organisations need to reimagine work in ways that meet the needs of workers in all kinds of jobs. This is where managing alternative forms of employment is critical. Organisations should strive to adapt and restructure job and work design, embrace the open talent economy, and redefine leadership in a digital, disrupted age. We recommend developing new ways of accessing talent by facilitating internal mobility, exploring the alternative workforce, and utilising new technologies that will facilitate this.

### **Evolve the adaptability of your organisation**

In a world of shifting expectations, new business demands and a war on talent, there is no place for traditional models and mind-sets. Flexibility is key, not only for employee experience, but for organisational culture as well. Organisations need agile leadership, adaptable organisational design, modern people practices and a willingness to experiment with the way work is done. Build an adaptable organisation that aligns tailored incentives with performance and maintains a culture of collaboration no matter where, when or how you are working.

## **4. Build an inclusive, safe, positive working environment and champion data privacy**

### **Create a safe environment**

Millennials want to feel safe in their working environment. Personal safety featured as a dominant concern this year, alongside online safety and data protection. One way of creating a safe, welcoming and positive environment is by building an inclusive culture. Policies, which set out measurable actions towards diversity and inclusion, will be a great way of making Irish millennials feel engaged, included and safe in the workplace.

### **Protect millennials with strong data privacy and online security**

Another aspect of the safety millennials crave relates to data privacy and online security. Organisations should be transparent in their approach to data collection, usage and storage. Millennials worldwide are fed up with personal intrusion, not least in Ireland. They want to trust that businesses will safeguard their online presence. Millennials desire to regain control of their data and companies that respect this desire and reflect this in their policies are likely to gain the trust and business of the millennial consumer.



# Get Ready – Millennial Checklist

Here's a checklist of 8 areas you should review and consider with regards to your millennial workforce and consumers:



Ask your employees about their concerns, and why certain issues really matter to them in order to create tailored rewards and individualise the engagement of your talent.



Consider the visible and vocal stances you will take to make a positive societal impact and explore how to balance profit with protecting the planet and helping solve society's greatest challenges.



Make your work meaningful for your people and to your customers.



Provide training and tools that enable your people to succeed in the future of work and Industry 4.0 and prioritise the continual development of your people.



Collaborate with other businesses, government and educators to transform the learning and development opportunities available to individuals.



Aim to consistently evaluate and improve on your employee experience.



Protect and safeguard your consumers and employees from digital threats with a strong data privacy and process in place.

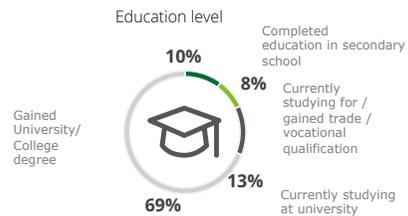
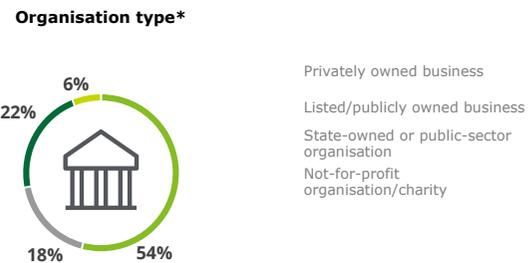
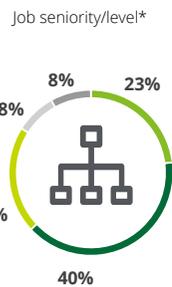
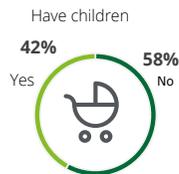
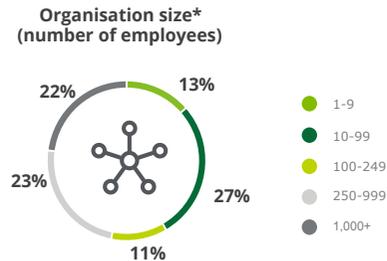
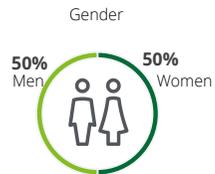


Become an Adaptable Organisation.



# Appendix: Survey demographics

Sample profile  
300 Millennial interviews achieved in the Republic of Ireland



# Contact



At Deloitte, we help clients deliver solutions that allows them to reimagine their employee experience and improve performance.

We help clients deliver outcomes that:

- Enable you to transition to the future of work
- Create an organisation with the best in class employee experience
- Optimise your human capital balance sheet by leveraging the contingent workforce
- Transform your organisation through digitalisation
- Sustain your organisation's performance

To find out more about the Millennial Survey Results or how we can help you, please contact our Human Capital Team.



**Valarie Daunt**  
Human Capital Partner  
vdaunt@deloitte.ie



**Ian Curtin**  
HC Financial Services Lead  
icurtin@deloitte.ie



**Gary Notley**  
HC Private Sector Lead  
gnotley@deloitte.ie



**Ciaran Duffy**  
HR Transformation Lead  
ciduffy@deloitte.ie



**Vicky Menzies**  
Organisation Transformation Lead  
vmenzies@deloitte.ie



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# Contacts

Dublin  
29 Earlsfort Terrace  
Dublin 2  
T: +353 1 417 2200  
F: +353 1 417 2300

Cork  
No.6 Lapp's Quay  
Cork  
T: +353 21 490 7000  
F: +353 21 490 7001

Limerick  
Deloitte and Touche House  
Charlotte Quay  
Limerick  
T: +353 61 435500  
F: +353 61 418310

Galway  
Galway Financial Services Centre  
Moneenageisha Road  
Galway  
T: +353 91 706000  
F: +353 91 706099

Belfast  
19 Bedford Street  
Belfast BT2 7EJ  
Northern Ireland  
T: +44 (0)28 9032 2861  
F: +44 (0)28 9023 4786

[Deloitte.ie](http://Deloitte.ie)