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2021 Millennial and Gen Z Survey

A call for accountability and action | India

Methodology and global key messages

Our methodology:

The 10th annual Millennial Survey solicited the views of **14.6K millennials and 8.2K Gen Zs** (22,928 respondents total) from **45 countries** around the world.

For the first time, we surveyed Gen Zs in all countries where we conducted fieldwork, including in 25 geographies where we had previously only surveyed millennials. As a result, year-over-year comparisons for Gen Zs are not yet always possible.

Fieldwork was completed between 8 January and 18 February 2021.

Millennials included in the study were born between January 1983 and December 1994. Gen Z respondents were born between January 1995 and December 2003.

Key findings:

Millennials and Gen Zs believe the world is at a tipping point on environmental issues, inequality, and racism. They are holding themselves and institutions accountable in order to bring about a more sustainable and equitable world. This year's survey unearths the following global insights:



The environment remains a top concern. During the pandemic, health care and unemployment topped millennials' list of concerns. But environment remained a priority (#3 for millennials and #1 for Gen Zs). ~40% believe that more people will commit to take action on environmental issues after the pandemic. But 60% fear business' commitment to helping combat climate change will be less of a priority as business leaders reckon with challenges brought on by the pandemic.



Millennials and Gen Zs believe discrimination is widespread. More than half of Indian millennials and close to half of GenZs feel personally discriminated against all the time or frequently on/by various platforms because of an aspect of their backgrounds.



High stress levels are driven by concerns about finances, family welfare, and job prospects. Almost half of Gen Zs and millennials said they feel stressed all or most of the time, which is higher than the global average. Apart from health, matters like financial security, welfare of the family, and job security are factors contributing to stress.



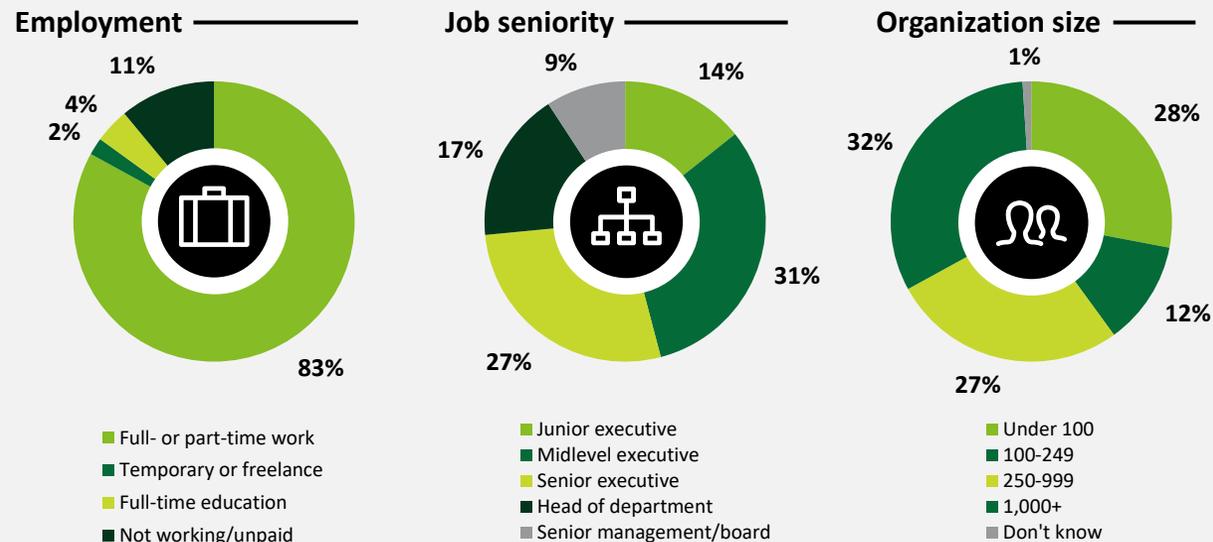
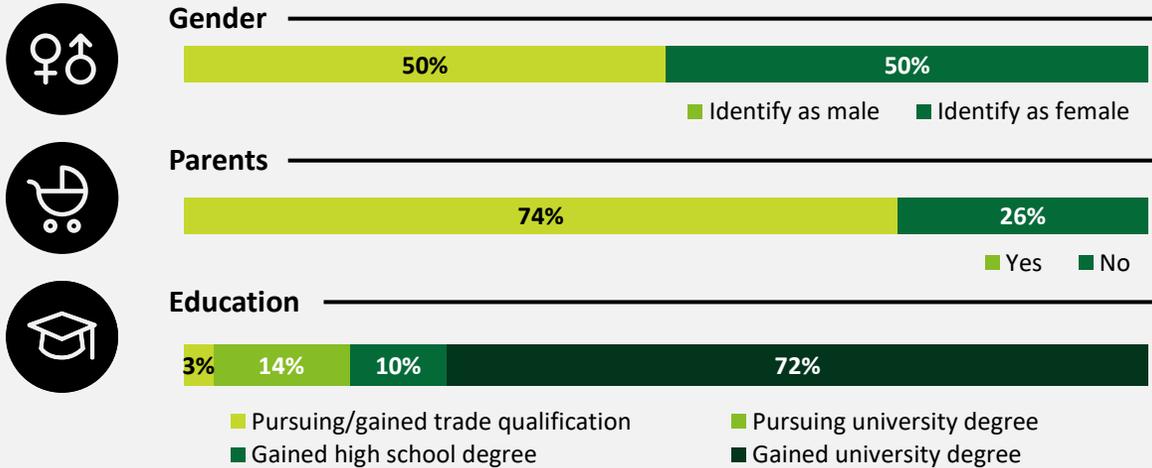
Stress and anxiety are prevalent in the workplace, and employers' efforts are in the spotlight. About a third of respondents (millennials 31%, Gen Zs 35%) said they've taken time off work due to stress caused by the pandemic. Interestingly more than 75% of Indian millennials say that have openly spoken about stress with their employers, well over the global average. There is also a considerably smaller proportion in India who disagree that their employer has taken action to support their mental health now, or that their employer is preparing policies for the future.



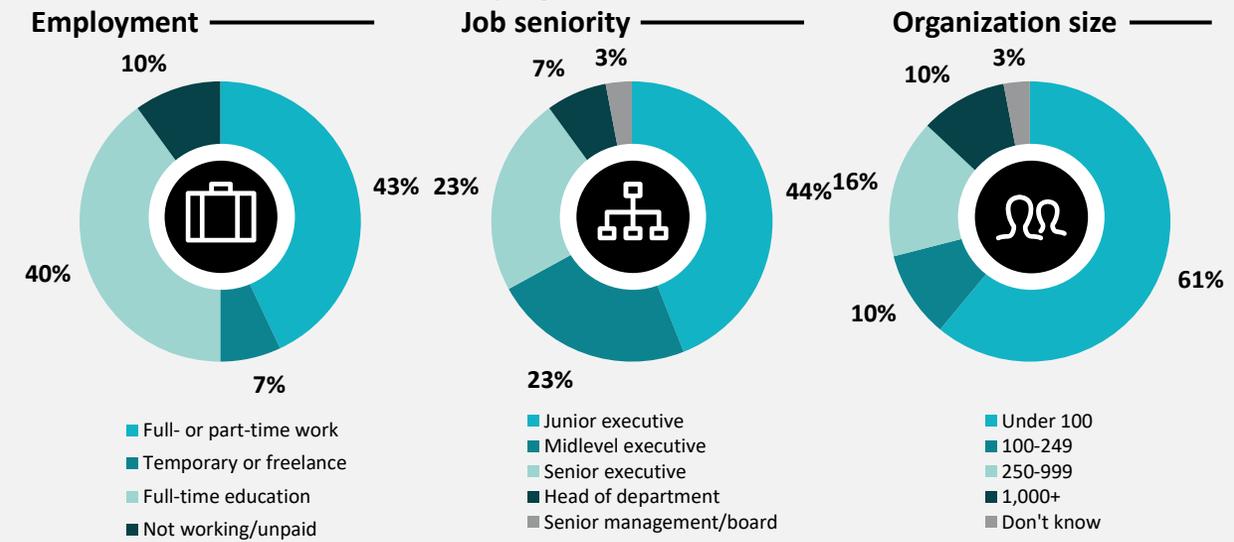
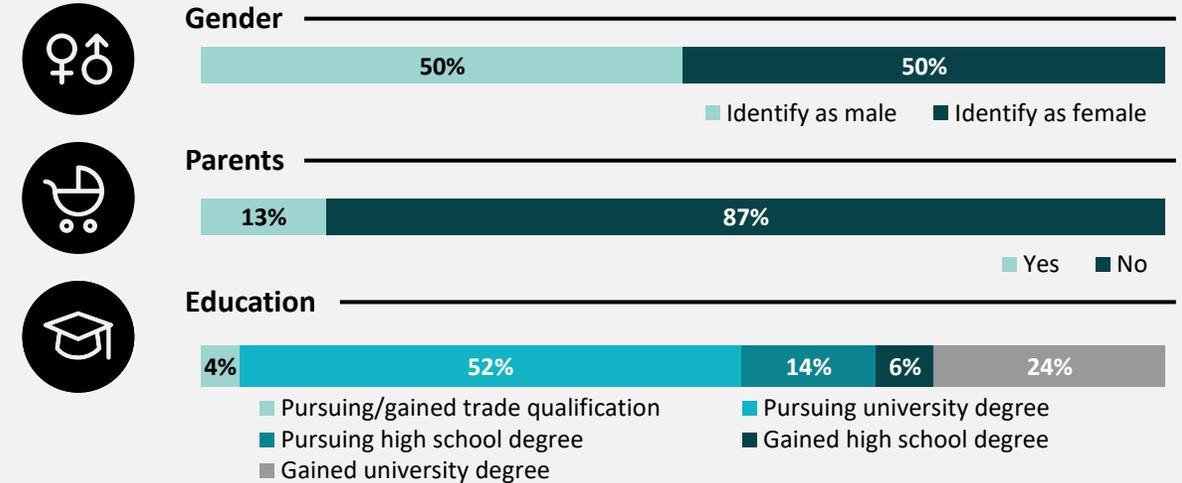
Views on business' social impact continues to decline; job loyalty slips. While the perception of businesses having a positive impact on society has steadily declined over the last five years globally, Indian respondents still rate businesses much more positively compared to their global counterparts. However, they more or less agree with the global perception of businesses largely being focused on their own interests and making money. Globally, job loyalty slipped from its 2020 peak. More millennials and Gen Zs would like to leave their employer within two years than last year—36% and 53% respectively, compared to 31% and 50% in 2020.

The following deck examines how **India's millennials and Gen Zs** stand out from their global counterparts on these key themes.

MILLENNIAL PROFILE



GEN Z PROFILE

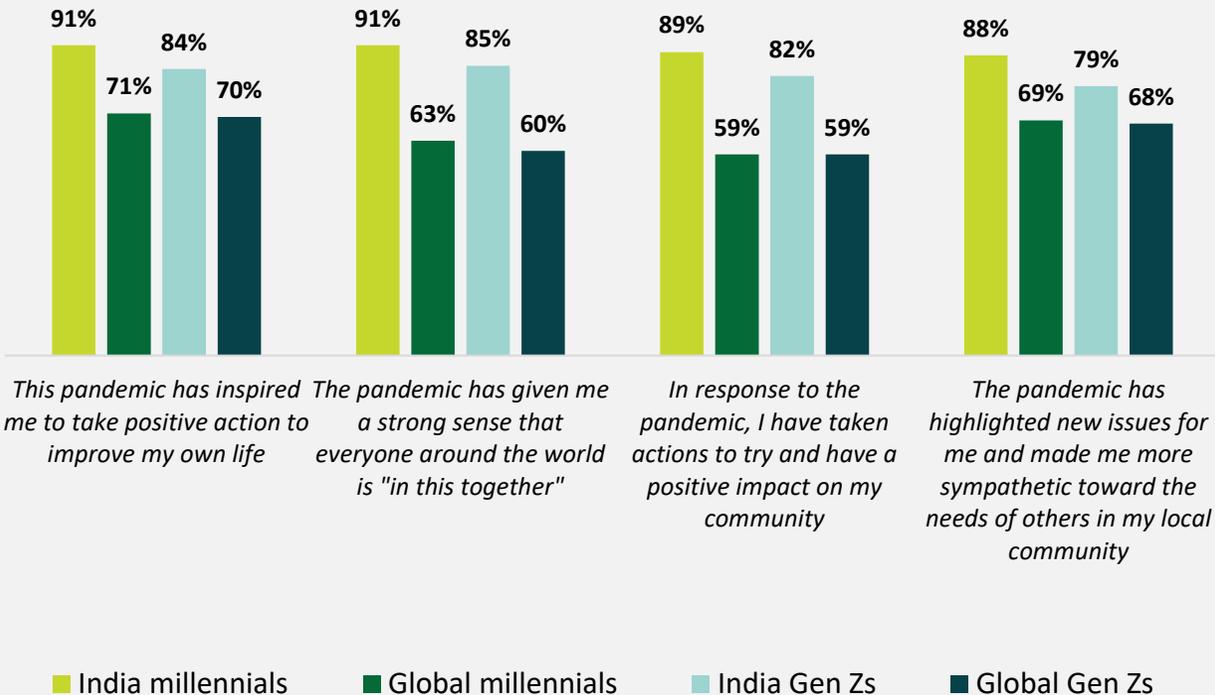


Social and environmental consciousness

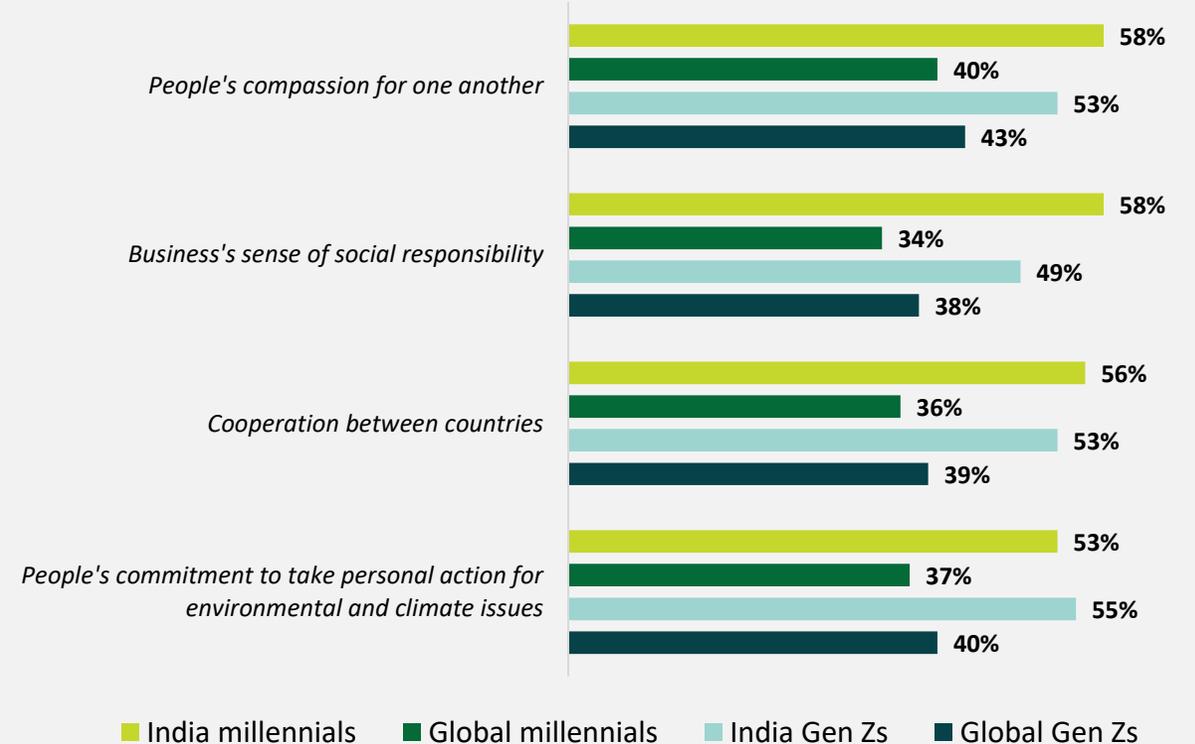
The pandemic: Reflecting on society and the future

- Both groups, particularly millennials, feel more optimistic the pandemic has encouraged positive personal change. Being inspired to improve their own lives and creating a sense of togetherness are the outcomes Indian millennials and Gen Zs feel have been the most positive.
- Across the board, Indian millennials and Gen Zs are more confident the pandemic bringing about change for the better, especially the importance people place on their health and the ability to deal with future pandemics.

Percent of respondents who strongly agree/tend to agree with the following statements:



Percent of respondents who think the following will have changed for the better when the pandemic is finally over:

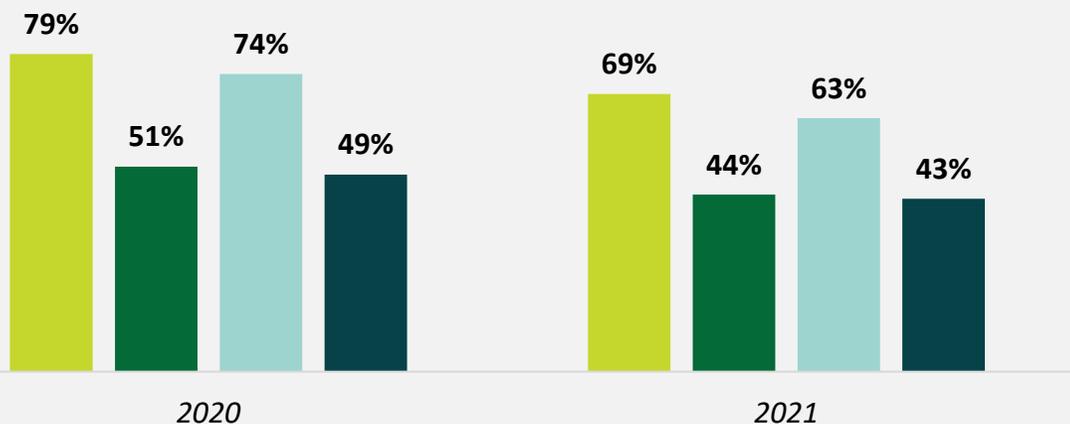


Time to act: The environment

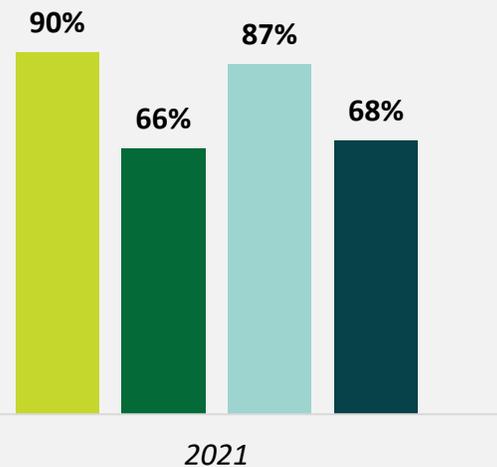
- Fewer millennials and Gen Z this year believe we have already hit the point of no return and it is too late to repair the damage.
- Nine in ten Indian millennials (90%) and Gen Z (87%) are optimistic that changes seen during the pandemic can reverse environmental damage.
- Over half of both groups are confident that people’s commitment to the environment will improve post-pandemic; this perception far exceeds the global average.

Percent of respondents who **strongly agree/tend to agree** with the following statements related to the environment:

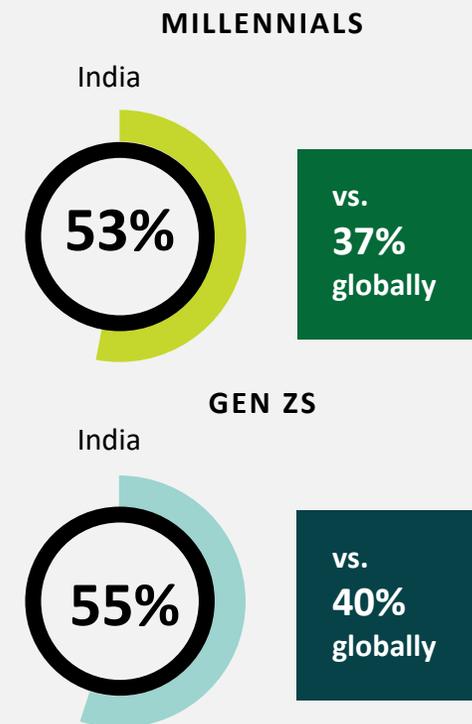
We have already hit the point of no return and it is too late to repair the damage



The environmental changes seen during the pandemic make me more optimistic that climate change can be reversed



Those who believe people’s **commitment to take personal action for environmental and climate issues** will have improved after the pandemic:

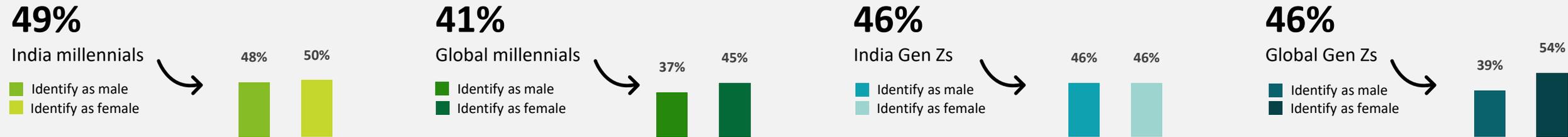


Mental health and stress

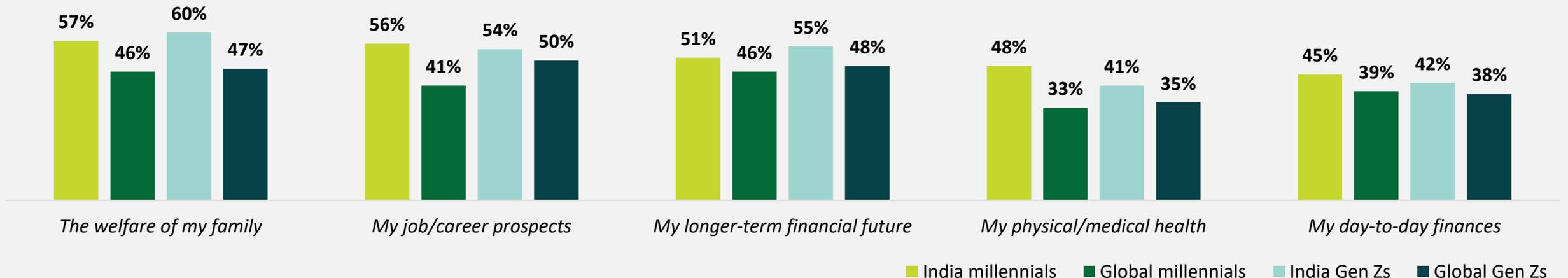
Mental health: Levels and sources of stress

- Overall stress and anxiety levels among Indian millennials (49%) are higher than the global average (41%), while Indian Gen Zs feel as anxious/stressed as the global average (46%). Gender is not a discriminator in India as it is elsewhere.
- Concerns for the welfare of their family, job/career prospects, and longer-term financial future are the primary causes of stress for both groups – all of which are higher than the global average.
- Of particular note, physical/medical health isn't a top driver of stress globally (33%), but for Indian millennials (48%) this is a much higher concern.

Percent of respondents who say they feel anxious or stressed all or most of the time:



Percent of respondents who say the following contribute a lot to their feelings of anxiety or stress*:

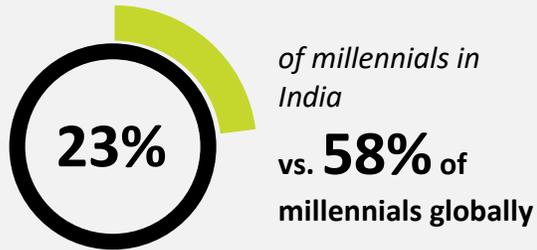


*Asked only of those who feel anxious or stressed

Mental health: Stress in the workplace

- Only a quarter (23%) of Indian millennials say they have not opened up to their employer regarding pandemic-induced stress, compared to a majority globally (58%).
- There is also a considerably smaller proportion in India who disagree that their employer has taken action to support their mental health now, or that their employer is preparing policies for the future.

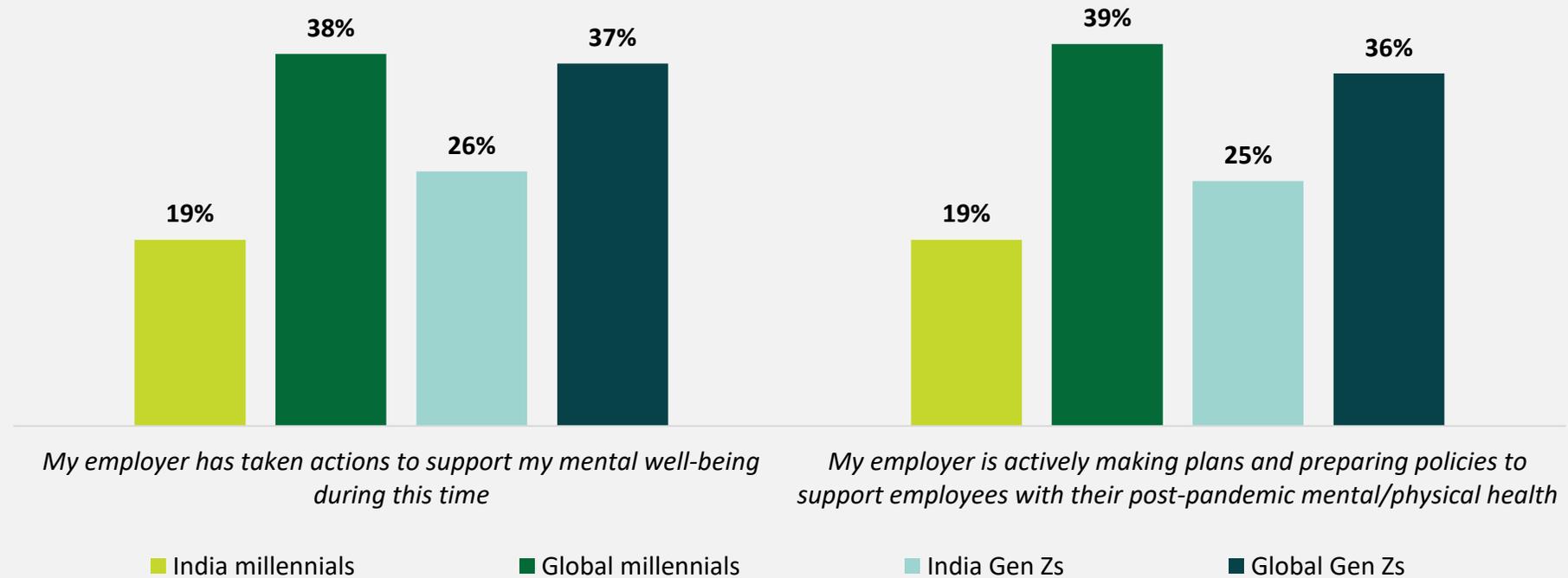
Percent of respondents who say they HAVE NOT spoken openly to their employers about feeling more stressed/anxious since the pandemic started*:



*Asked only of those who report being more stressed from the pandemic and in full-time, part-time or temporary employment

N.B. Data for this question not reported among Gen Zs due to low base sizes at country level.

Percent of respondents who strongly disagree/tend to disagree with the following statements when thinking specifically about their current employer's response to COVID-19*:



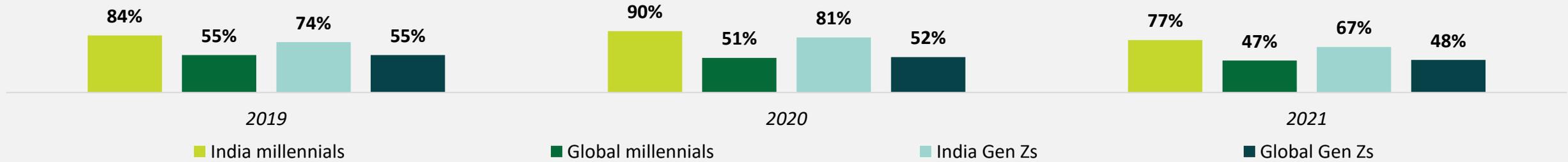
*Asked only of those in full-time, part-time or temporary employment

Views of business

View of business

- While Indian millennials (77%) and Gen Zs (67%) have a strong regard of business' positive societal impact, sentiment has declined on 2020's highs.
- Negative perceptions of business being focused on its own agenda rather than considering wider society remain high but have decreased a bit from 2020. The same is true around perceptions on business having no ambition beyond wanting to make money.

Percent of respondents who think business has a very or fairly positive impact on society:



Percent of respondents who strongly agree or tend to agree that, on balance, the following describe business' current behavior:



Discrimination

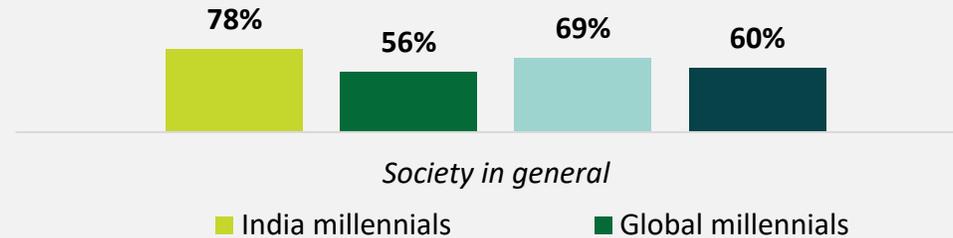
Concerns: Discrimination

- Discrimination is personally experienced by Indian millennials and Gen Z around twice more commonly than globally. 60% of Indian millennials and 50% of Gen Z say they feel personally discriminated against all the time or frequently on social media.

Percent of respondents who feel personally discriminated against all the time or frequently because of an aspect of their backgrounds:



Percent of respondents who believe systemic racism is very or fairly widespread :

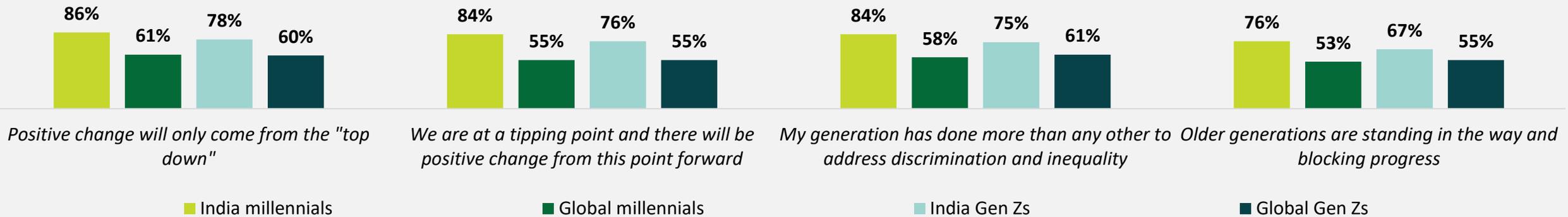


*Not asked in China. **Only asked of those in full-time, part-time or temporary employment.

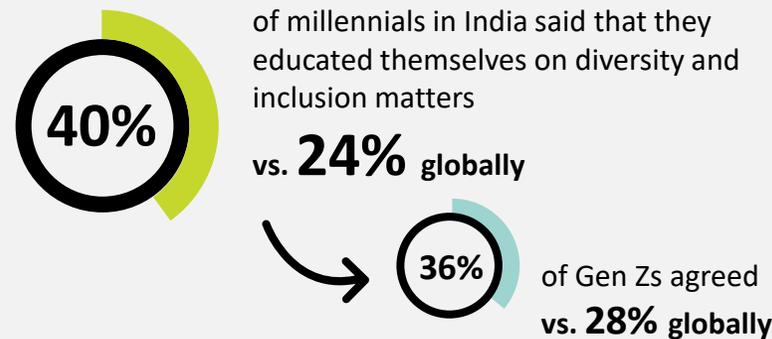
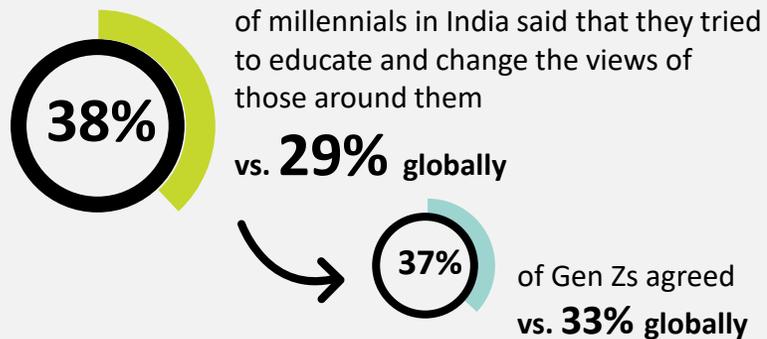
Time to act: Discrimination

- Indian millennials and Gen Z are more active than the global average in personally trying to tackle discrimination (40% of Indian mills; 36% of Gen Zs).
- Further, 25% of Indian Mills and 22% if Gen Zs have boycotted a company because it’s views or behaviors don’t align with their own, which is higher than the global average.
- Both groups feel that there will be positive change from this point forward, but positive change will only come from the “top down” according to 84% of Indian millennials and 76% of Gen Z. They also strongly believe their generation has done more to address discrimination and inequality, and that older generations are standing in the way of progress.

Percent of respondents who **strongly agree/tend to agree** with the following statements with respect to discrimination:



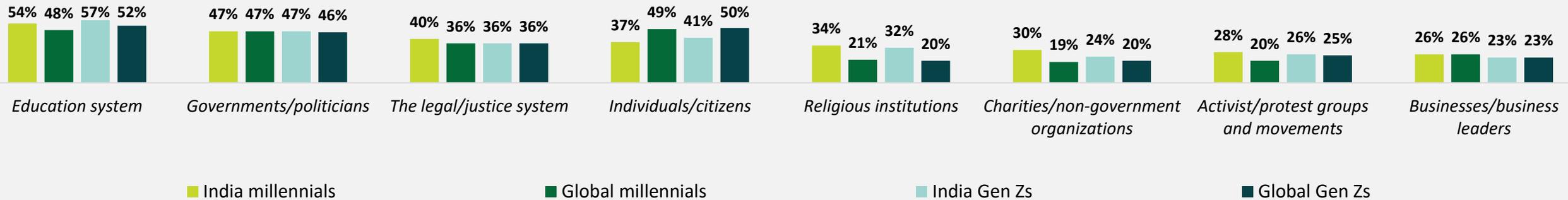
What actions have you taken to try to tackle discrimination?



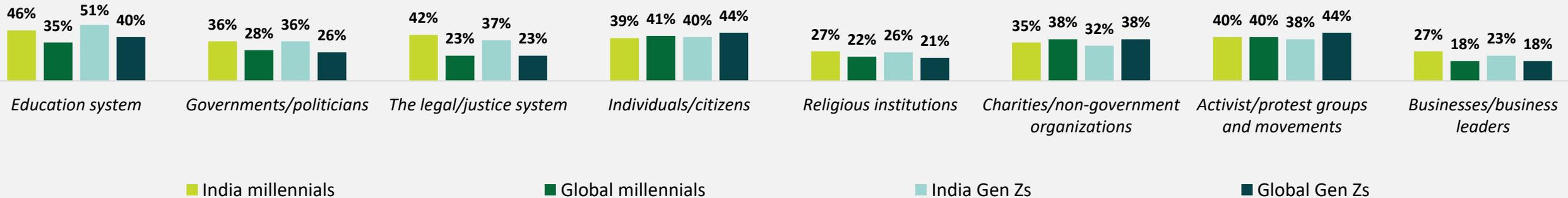
Time to act: Who is making a difference when it comes to fighting systemic racism?

- Indian millennials and Gen Z agree with their global counterparts that education systems have the greatest potential to address systemic racism but unlike globally, Indian citizens feel the education system is actually making the greatest effort.
- Both groups feel individuals don't have as much potential to bring about significant change compared to globally, but instead have stronger confidence in the impact of religious institutions.

Which of the following do you believe have the greatest potential to help bring about significant change with respect to systemic racism in your country?*



Which do you think are making the greatest effort to reduce systemic racism in your country?*



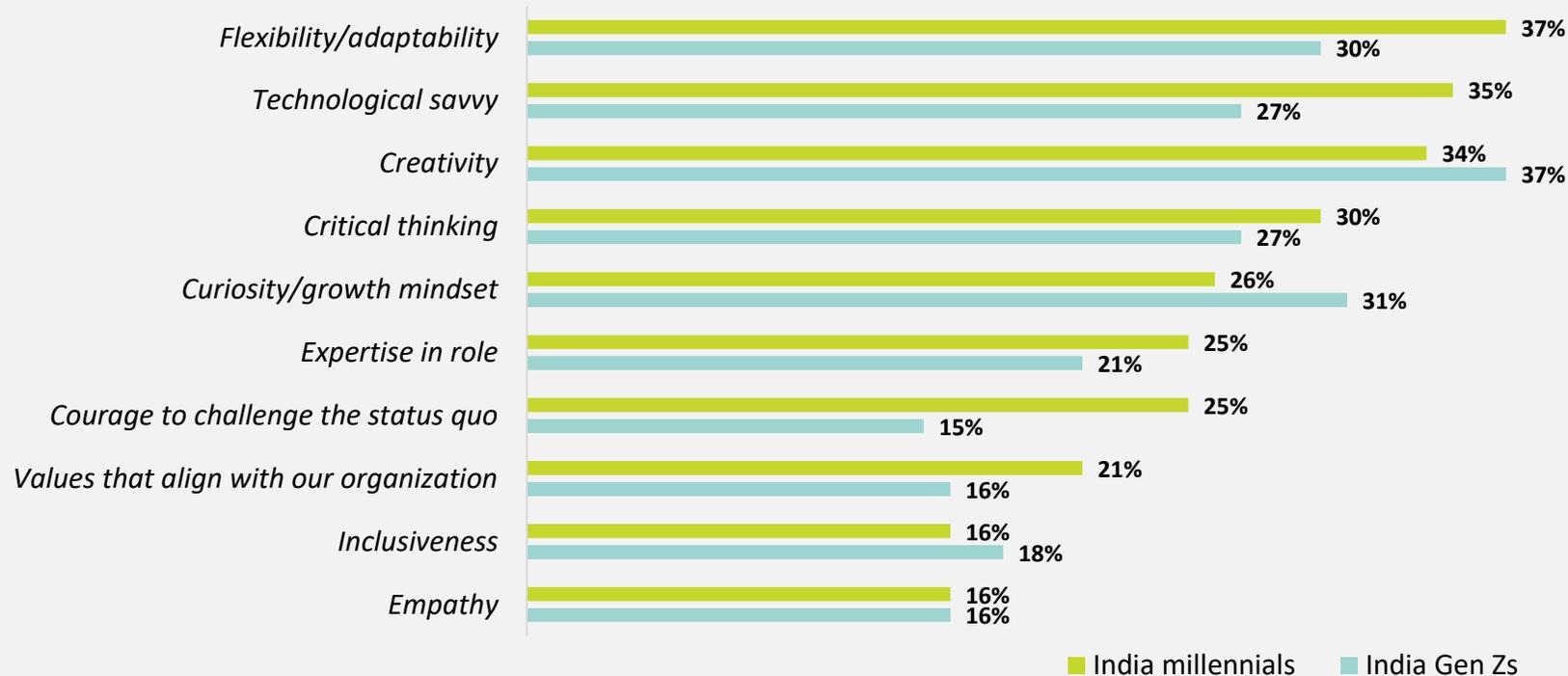
*Up to three options selected at both questions.

Other findings

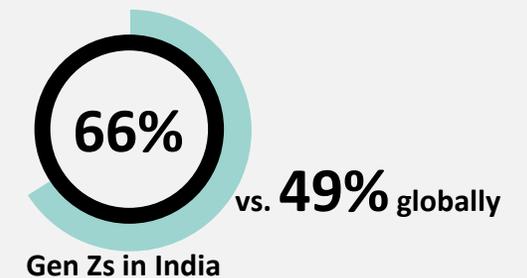
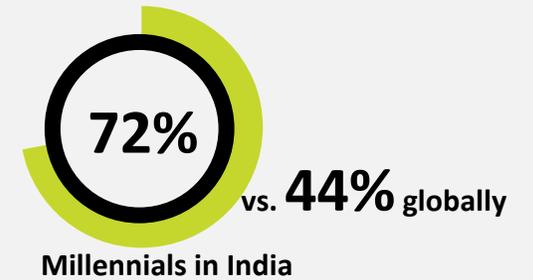
The future of work: Flexibility is key, but ethics are unbending

- While India’s millennials (36%) consider ‘flexibility/adaptability’ to be an employee characteristic most critical to successful organizations, Gen Zs have believe ‘creativity’ (37%) is the most critical characteristic.
- Personal beliefs/ethics are far more influential over the type of work Indian millennials and Gen Zs are willing to do (72% / 66%) vs. the global average (44% / 49%).

Employee characteristics most critical to success of organization*:



Those who have made choices over the types of work they’d do and the organizations they’re willing to work for based on their personal beliefs/ethics over the past two years:

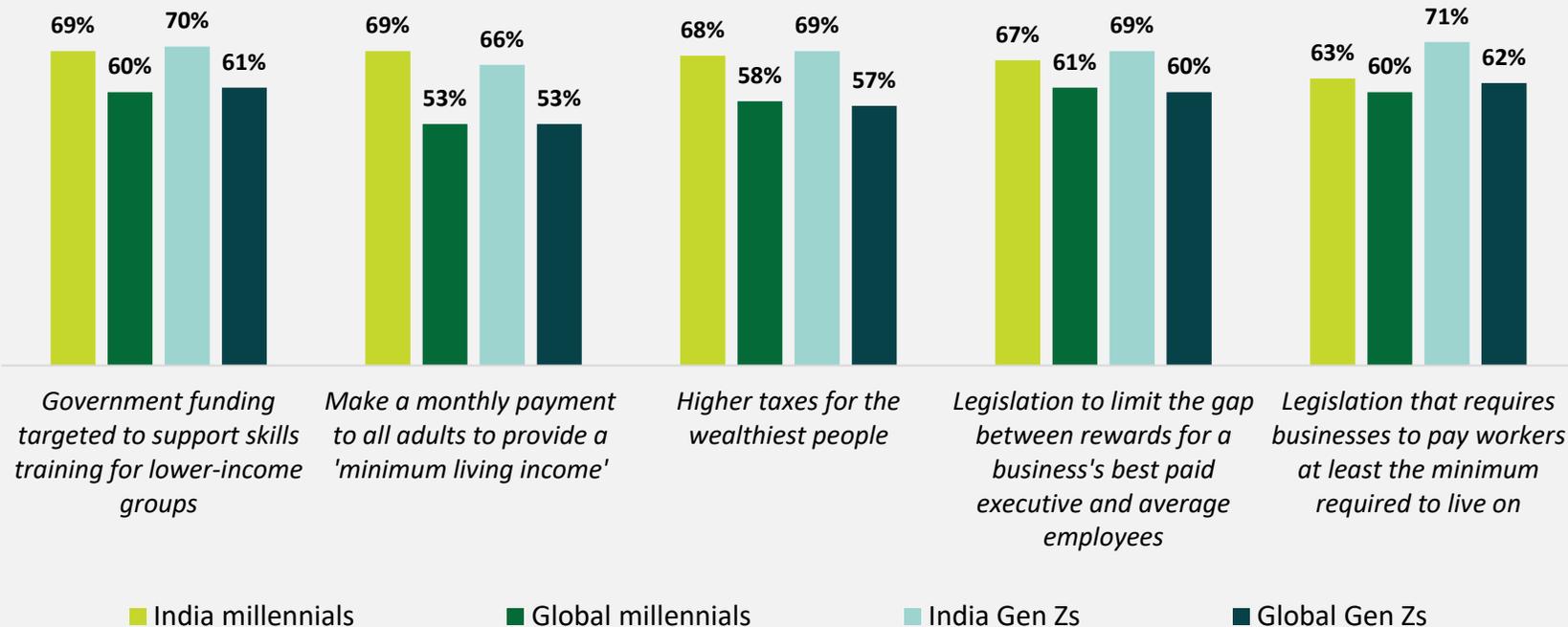


*Asked only of those in full-time, part-time or temporary employment

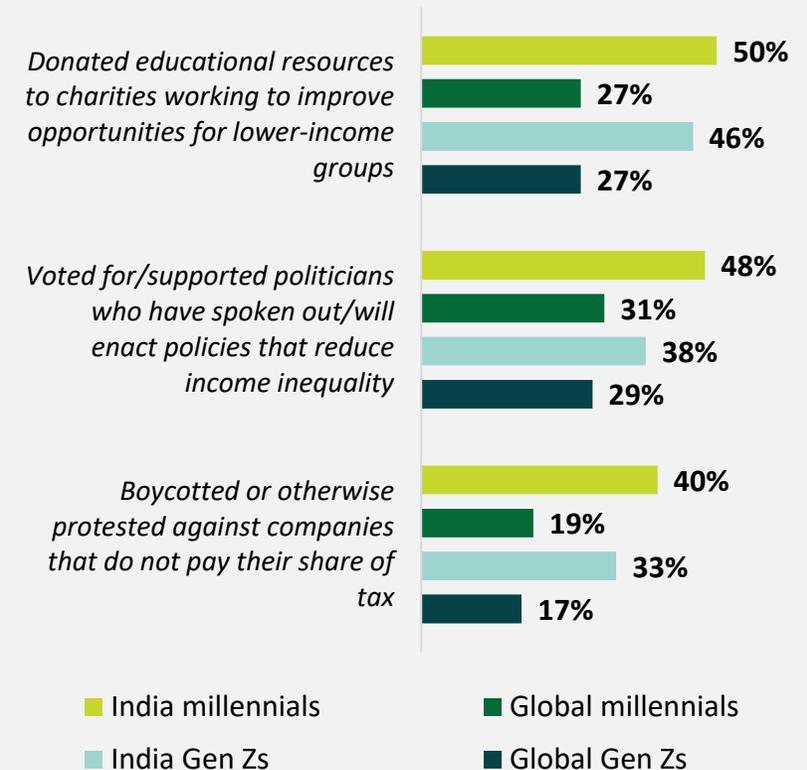
Time to act: Wealth and income inequality

- Both generations strongly feel there are multiple methods to help reduce inequality
- Encouragingly, Indian millennials and Gen Zs have taken considerably more action to help reduce income inequality compared to globally across all areas. Around half of millennials have either donated educational resources to charities working to improve opportunities for lower-income groups (50%), or have voted for/supported politicians who have actively spoken out on the issue (48%).

Percent of respondents who think the following actions would help reduce inequality in their country:



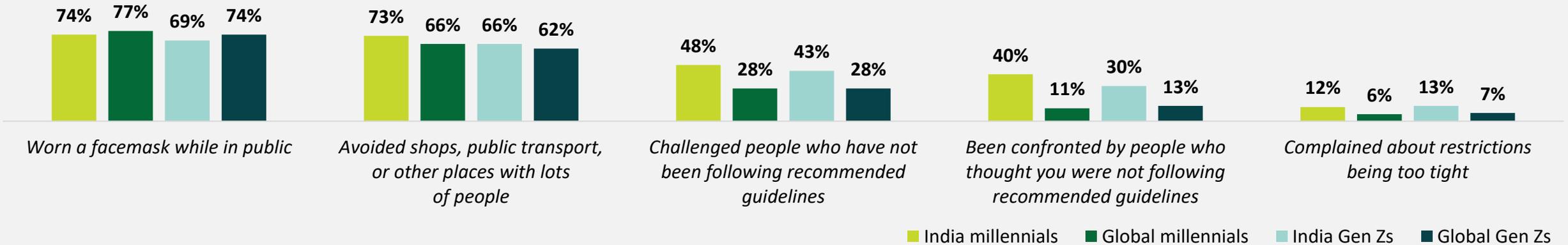
Which of these actions have you taken to help reduce income inequality in your country?



The pandemic: Adherence to COVID-19 guidelines

- The vast majority of Indian millennials (86%) and Gen Zs (80%) adhere strongly to public health guidelines throughout their day-to-day lives; more so than the global average.
- Both groups are slightly less likely than the rest of the world to wear a facemask in public, but are far more likely to challenge other people for not following guidelines, as well as avoided shops and other public places.

Which of the following, if any, have you **done regularly** during the COVID-19 pandemic?



In your day-to-day life, how seriously do you follow your **government's public health guidelines** around the COVID-19 pandemic?*



of millennials in India said that they had "very" or "fairly" seriously **followed their government's public health guidelines** around the COVID-19 pandemic

vs.
74%
globally



of Gen Zs in India said that they had "very" or "fairly" seriously **followed their government's public health guidelines** around the COVID-19 pandemic

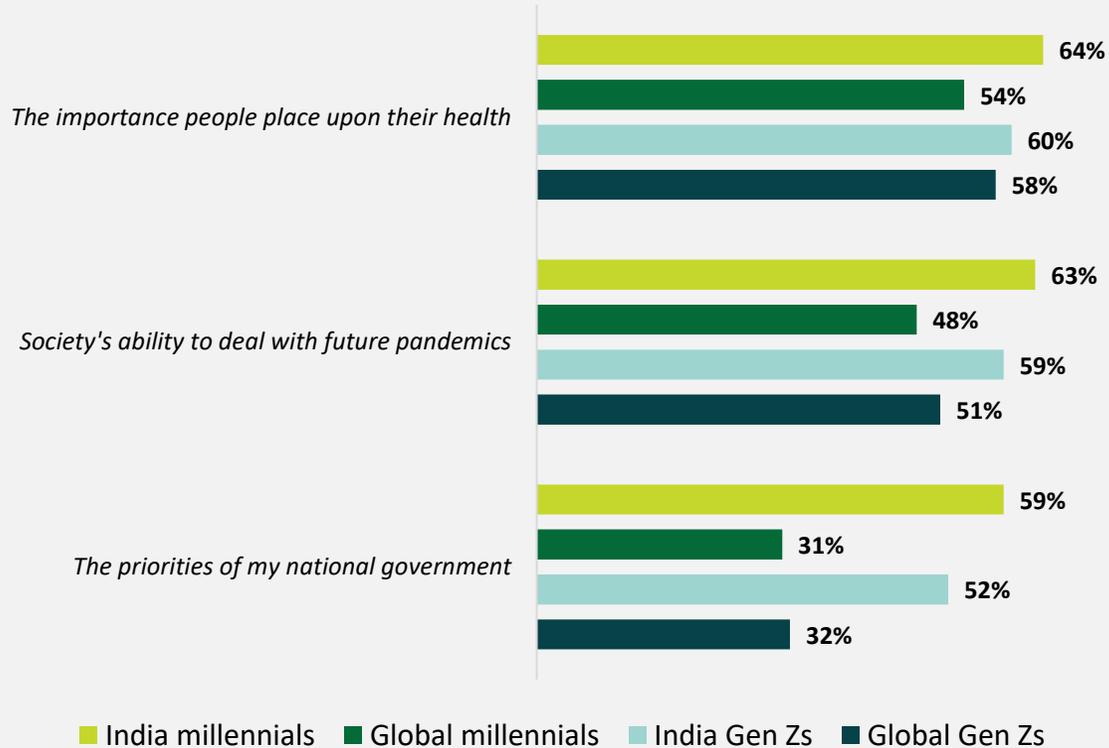
vs.
69%
globally

Outlook

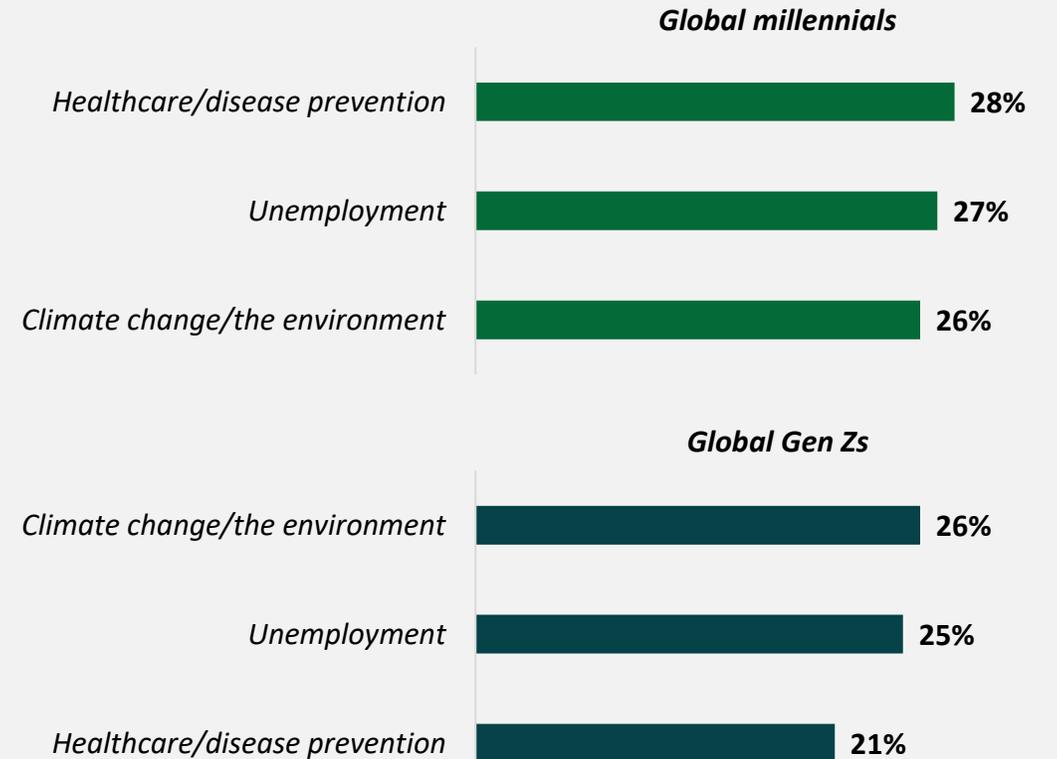
The pandemic: Reflecting on society and the future

- Across the board, Indian millennials and Gen Zs are more confident the pandemic bringing about change for the better, especially the importance people place on their health and the ability to deal with future pandemics.

Percent of respondents who think the following will have changed for the better when the pandemic is finally over:



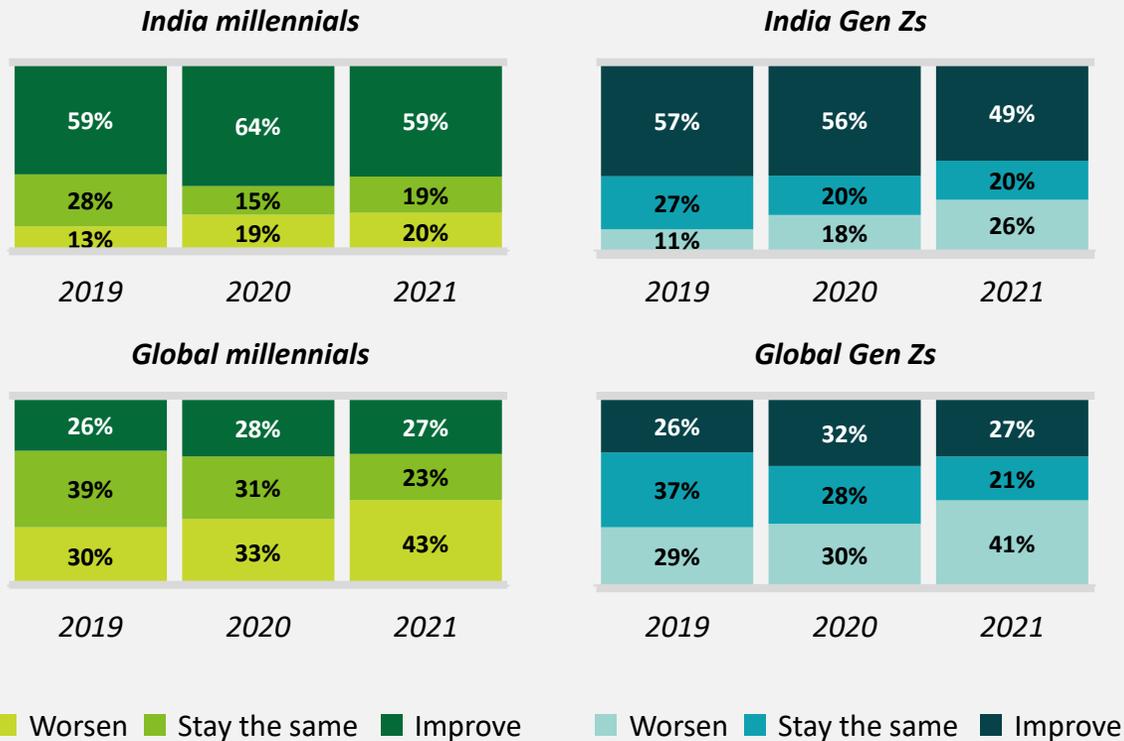
Top three issues of greatest concern:



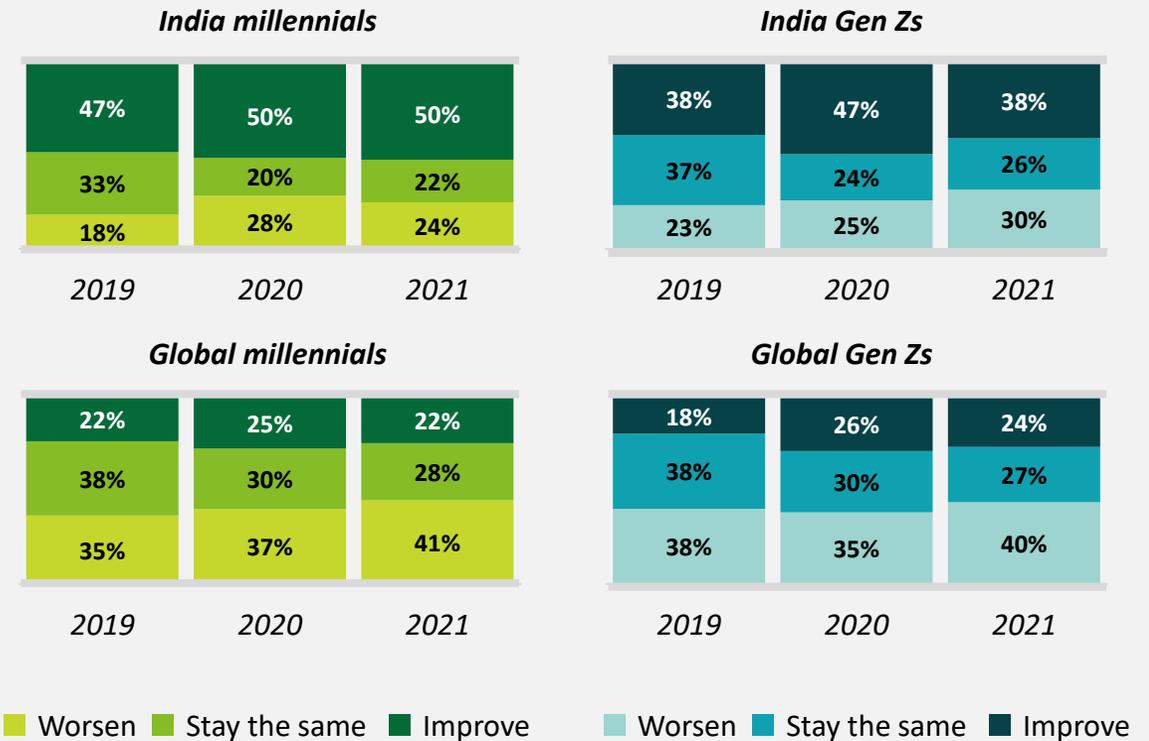
Economic and political outlook

- Indian millennials and Gen Zs are much more optimistic that the economic situation their country will improve over the next 12 months, compared with their global peers. Although Gen Z feel less optimistic.
- Half of Indian millennials still expect the country’s socio-political situation to improve, though fewer Gen Z agree this year (38% versus 47% in 2020).

How do you expect the **overall economic situation** in your country will change over the next 12 months?



How do you expect the **overall sociopolitical situation** in your country will change over the next 12 months?*



*Not asked in China

2021 MILLENNIAL SURVEY
Millz Mood Index

The Millz Mood Index gauges the mood of respondents and provides an annual snapshot of millennials' optimism that the world and their places in it will improve.

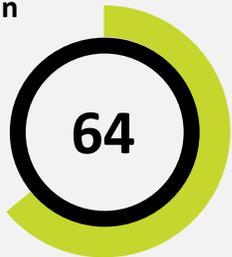
Scores are based on results from the following five questions and are aggregated to create a measure between zero and a hundred. This scale gives us the ability to compare not only year-to-year movement, but also regional and demographic groups within a given year.



MILLENNIALS:

Millennials in India:

↓ -5 pts.



Identify as female:

64



Identify as male:

63



Millennials globally:

↓ -3 pts.



Identify as female:

31



Identify as male:

38



GEN ZS:

Gen Zs in India:

↓ -7 pts.



Identify as female:

49



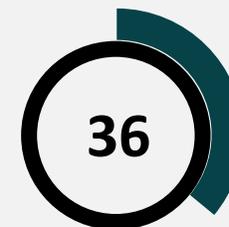
Identify as male:

60



Gen Zs globally:

↓ -3 pts.



Identify as female:

31



Identify as male:

40





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