

2019 Deloitte Global Millennial Survey

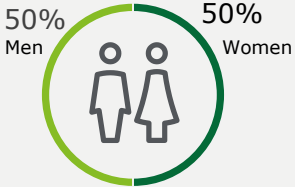
A "generation disrupted"
South Africa results

May 2019

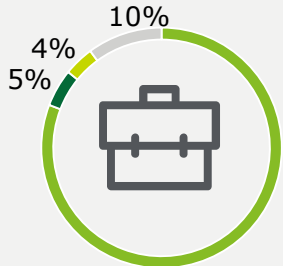
Sample profile

300 Millennial interviews conducted in South Africa

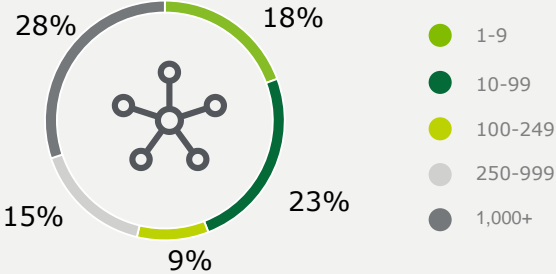
Gender



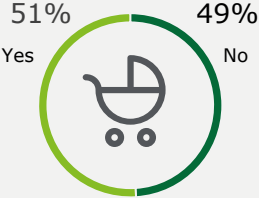
Working status



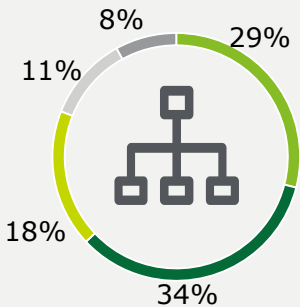
Organization size* (number of employees)



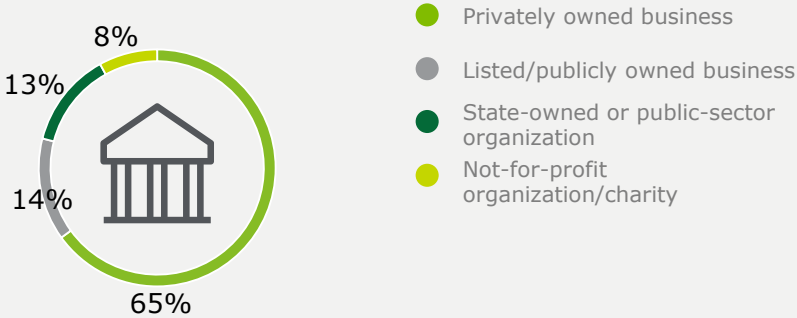
Have children



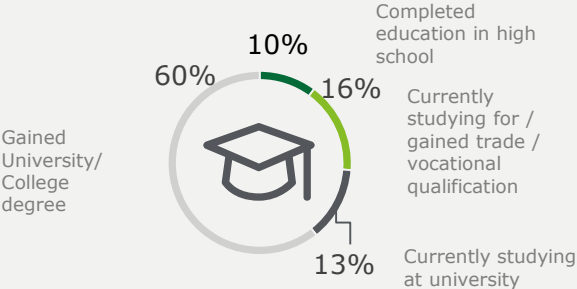
Job seniority/level*



Organization type*



Education level



- Working full or part-time (less than 30 hours per week)
- Temporary / freelance
- In full time education
- Not working / in unpaid work

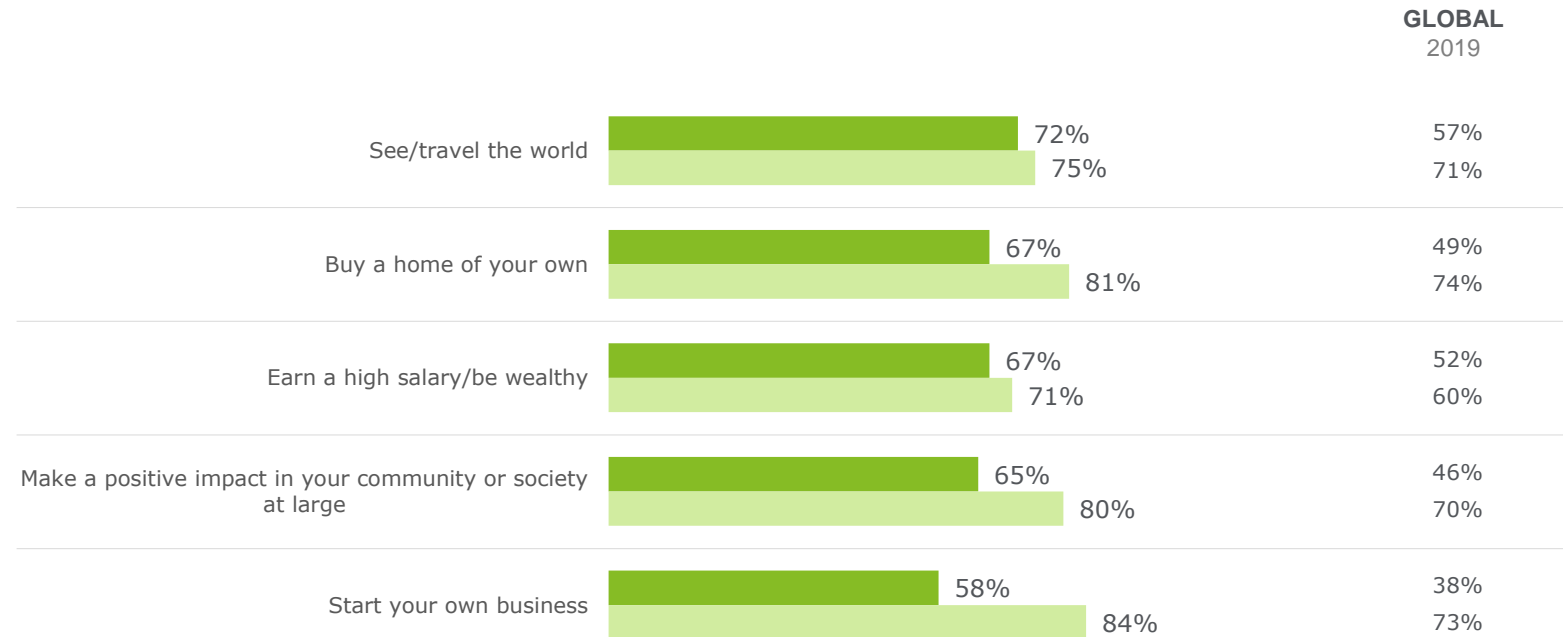
- Junior-level executive
- Mid-level executive
- Senior executive
- Head of department/division
- Senior management team/board

- 1-9
- 10-99
- 100-249
- 250-999
- 1,000+

- Privately owned business
- Listed/publicly owned business
- State-owned or public-sector organization
- Not-for-profit organization/charity

Altered aspirations

TOP 5 MILLENNIAL AMBITIONS



■ Have an ambition to ■ Think this ambition is achievable

CLAIM THEY ARE 'SATISFIED' WITH THEIR LIFE NOWADAYS (8, 9 or 10 / 10)

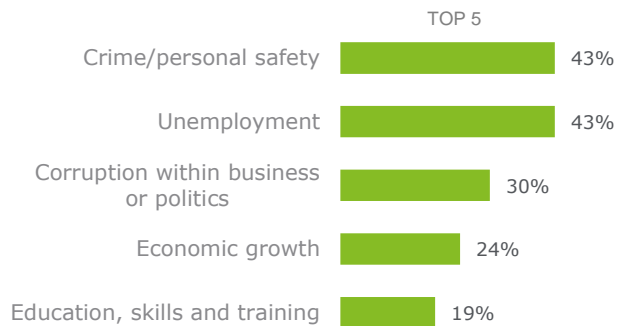
17% **29%**

South Africa

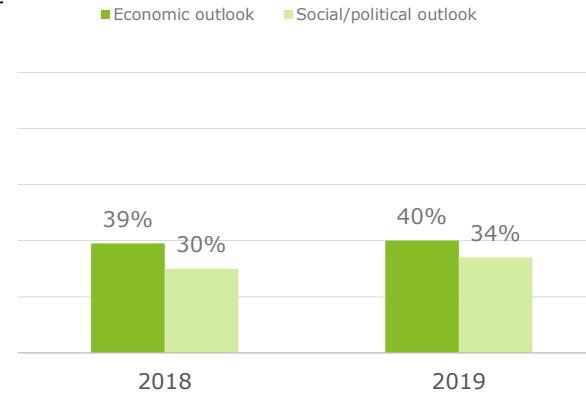
Globally

View of the world

% **Millennials** personally concerned about...



% **Millennials** who say that the ... situation in South Africa 'will improve' in the next 12 months...



GLOBAL
2019



*Excludes China

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

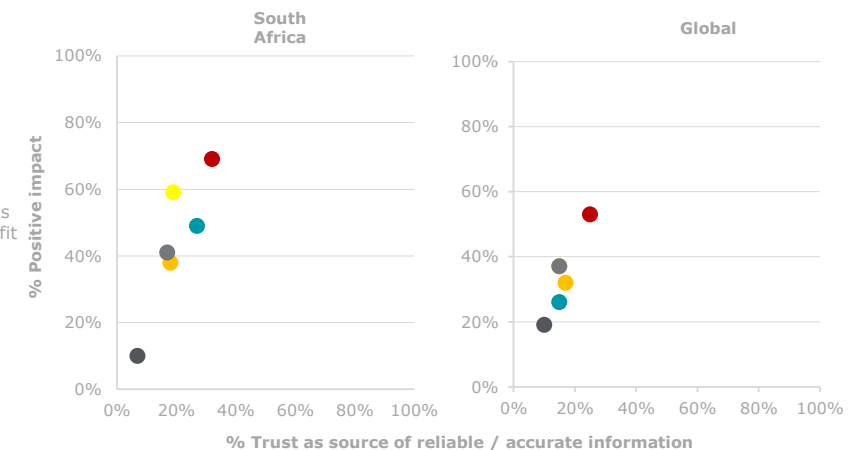
	South Africa	Global
Universities/science and research institutes	29%	27%
Business	26%	20%
Government	22%	29%
Charities/NGOs	10%	13%

% **Millennials** who agree 'There are no barriers to prevent me from reaching my career ambitions'



% **Millennials** who say the following groups of people and organizations are having a 'positive impact' on the world, and can be trusted 'a lot' as sources of reliable/accurate information

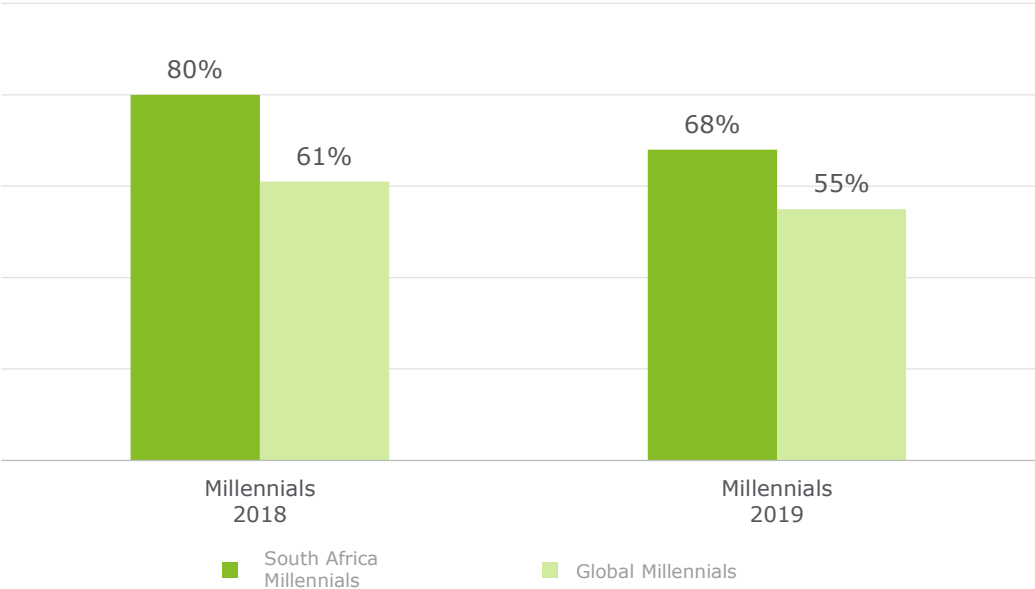
- Political leaders
- Religious/faith leaders
- Social media platforms
- Business leaders
- Traditional media / journalists
- Leaders of NGOs and not-for-profit organizations



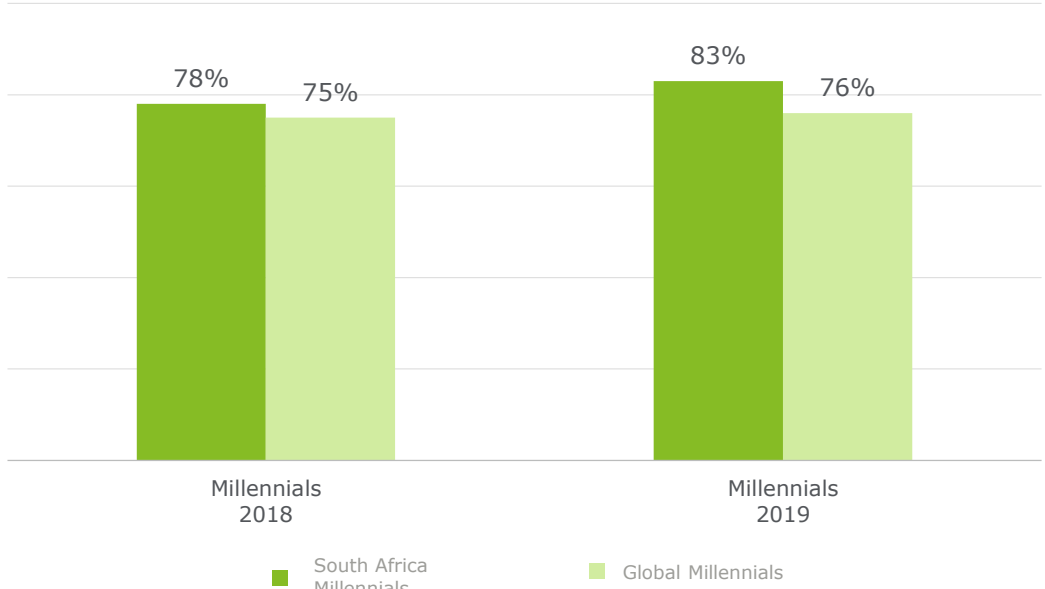
Q1. Thinking about the challenges facing societies around the world (including your own), which three of the following issues are you personally most concerned about? Please select up to three issues..Q17. In the future, who will be best able to solve the world's most pressing challenges? Choose one. Q23. To what extent do you agree or disagree with the following statements? 'There are no barriers to prevent me from reaching my career ambitions'. Q18. Do you think the following groups of people and organizations are having a positive or negative impact on you and the world in which you live? Q19. Thinking of these same people and organizations, how much trust do you have in them as sources of reliable and accurate information?
2019 Base: All Millennials in South Africa 319, Globally 13,416
2018 Base: All Millennials in South Africa 337, Globally 10,455
NOTE: Trend is indicative but not a true like for like comparison. 2018 based on degree-educated Millennials in full-time employment

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

% 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'



Q11. Thinking about businesses in general around the world, what impact do you think they are having on the wider society in which they operate?
 Q14. Thinking about business in general, would you agree or disagree that, on balance, the following statements describe their current behaviors?
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The impact of Industry 4.0



- Millennials in South Africa
- Millennials Globally

BELIEVE INDUSTRY 4.0 WILL MAKE IT HARDER TO GET OR CHANGE A JOB IN THE FUTURE

58%
46%

Millennials in South Africa / Globally
who are employed full / part time

71%
45%

Millennials in South Africa / Globally
who are not working or in unpaid work

BELIEVE THEY HAVE ALL / SOME OF REQUIRED SKILLS / KNOWLEDGE AS THE WORKING ENVIRONMENT IS SHAPED BY INDUSTRY 4.0

88%
81%

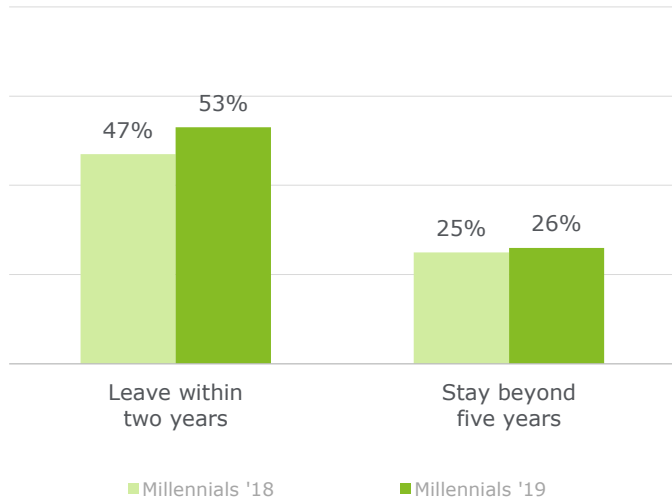
Millennials in South Africa / Globally
who are employed full / part time

68%
65%

Millennials in South Africa / Globally
who are not working or in unpaid work

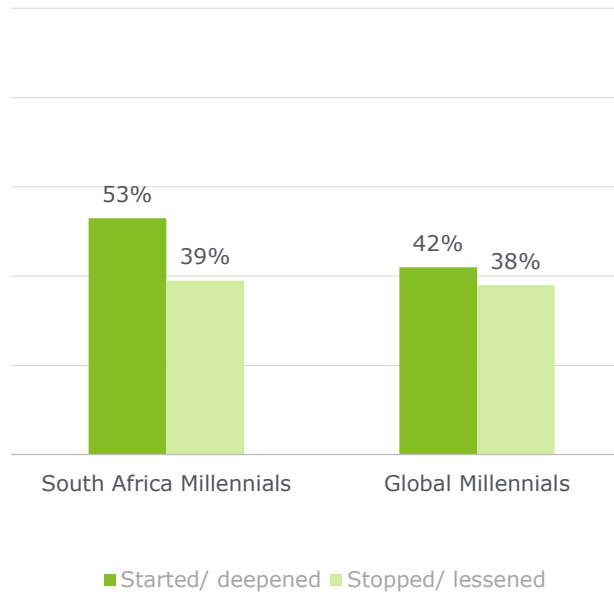
Disrupted, but also disrupting

% who expect to leave / stay with their current employer...



Global	Millennials
Leave in the next 2 years	49%
Stay beyond 5 years	28%

% who as a consumer have started/deepened and stopped/lessened a relationship with a business because its products or services positively / negatively impact the environment or society



% who would consider joining the gig economy



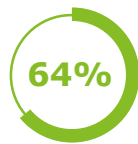
	Millennials 2019
South Africa	96%
Global	84%

Q7. 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?
 Q42. Would you consider joining the gig economy? Q20/21. As a consumer, have you ever started or deepened / stopped or lessened a relationship with a business because of the following: 'It has products/services that positively / negatively impact the environment/society?'
 2019 Base: All Millennials in South Africa 319, Globally 13,416
 2019 Base: All Millennials in work in South Africa 256, Global 10,736 2018 Base: All Millennials in work in South Africa 337, Global 10,455
 NOTE: Trend is indicative but not a true like for like comparison. 2018 based on degree-educated Millennials in full-time employment

Social media: Friend or foe?

% Millennials who agree that...

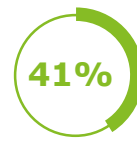
I'd be **physically healthier** if I reduced the time I spend on social media



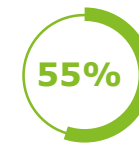
I'd be a **happier person** if I reduced the time I spend on social media



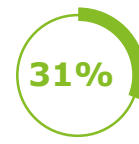
I'd be **anxious if I couldn't check social media** or had to do without it for a day or two



On balance, social media **does more harm than good**



I'd like to **completely stop using** social media



GLOBAL 2019

64%

60%

44%

55%

41%

% Millennials concerned about...

		GLOBAL 2019
Being the victim of online fraud	92%	79%
The security of the personal data that public bodies hold on you	88%	70%
The security of the personal data that businesses hold on you	86%	73%
The way in which organizations obtain personal information	85%	76%

% Millennials agree...

		GLOBAL 2019
I feel I have no control over who has my personal data or how they use it	78%	75%
To get the most from technology, we must be prepared to share some of our personal details	69%	62%
The benefits of technology outweigh the risks associated with sharing my personal data	55%	61%

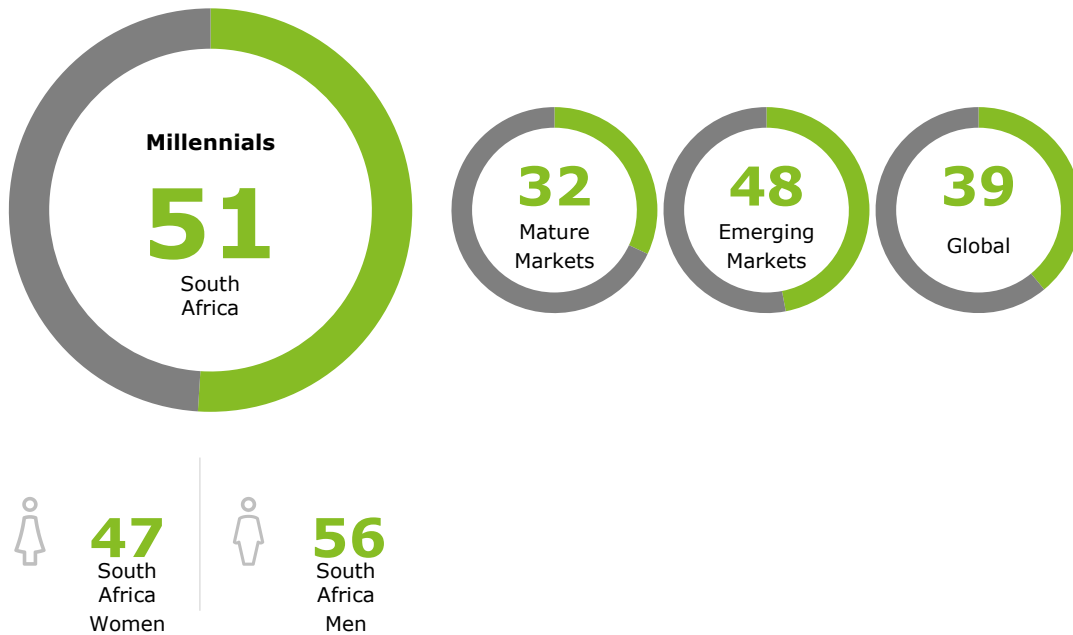
% Millennials who believe [institution] 'need to make more effort' to protect people's data and online security

		GLOBAL 2019
Government/regulators	68%	54%
Tech companies	62%	49%
Businesses who sell goods and services to people...	58%	47%
Social media platforms	58%	52%
Individuals	52%	40%

Q38. Do you agree or disagree with the following statements about the use of social media? Q39 How concerned are you, if at all, about the following?
 Q40 Do you agree or disagree with the following statements about the use of online data and the organizations that collect it from you and other individuals?
 Q41. What do you think of the effort being made by the following groups to protect people's data and online security?
 Base: All Millennials in South Africa 319, Global 13,416

The MillZ Mood Monitor

- South African millennials, who scored 51, scored higher on the mood index than their global counterparts at 39.



Scores are based on results from the following five question topics that are aggregated to create a measure of 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



THE ECONOMIC SITUATION



THE SOCIAL/
POLITICAL SITUATION



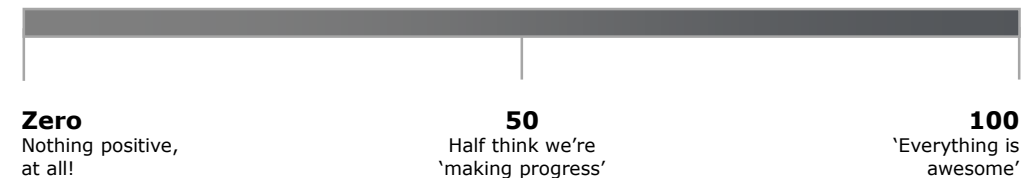
PERSONAL FINANCIAL SITUATION



THE ENVIRONMENT



IMPACT OF BUSINESSES ON WIDER SOCIETY





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