Background

200 interviews achieved in South Africa

Gender

- Male: 50%
- Female: 50%

Have children

- Yes: 50%
- No: 50%

Education level

- University/College Degree: 89%
- 2nd Degree, Masters or PhD: 11%

Organization size

- 1-99 employees: 23%
- 100-249 employees: 17%
- 250-999 employees: 24%
- 1000+ employees: 36%

Organization type

- Listed / publicly owned business: 63%
- Privately owned business: 21%
- State owned or public sector organization: 13%
- Not for profit organization / charity: 2%
- Other: 13%

Job seniority / level

- Trainee / apprentice / graduate: 12%
- Junior level executive: 15%
- Mid-level executive: 29%
- Senior executive: 22%
- Head of department / division: 8%
- Senior management team / board: 12%
Top 5 issues of greatest personal concern to Millennials in South Africa

- **46%** Crime / personal safety
- **45%** Unemployment
- **30%** Corruption within business or politics
- **26%** Education, skills and training
- **22%** Healthcare / disease prevention

Q5. Taking everything into account do you expect the overall economic situation in South Africa to improve, worsen or stay the same over the next 12 months? Q6. Taking everything into account do you expect the overall social/political situation in South Africa to improve, worsen or stay the same over the next 12 months? Q7. Thinking about the world in general how do you feel about the future? Compared to your parents do you think you will be financially/materially better off/Happier? Q8. Thinking about the challenges facing societies around the world (including your own), which three of the following issues are you personally most concerned about? Base: South Africa: 200; Global 7900
Q1. Thinking about businesses in general around the world, what impact do you think they are having on the wider society in which they operate?

Q9. Thinking about the challenges of greatest concern to you, do you feel the following institutions / groups of people have (potential/determination/made positive impact) to solve these challenges?

Q12. In general do you approve or disapprove of political leaders thinking and speaking in the following ways? Would you approve or disapprove if business leaders started to think and speak in the following ways?

Base: South Africa: 200; Global: 7,900

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

- South Africa
  - 2014: 74%
  - 2015: 73%
  - 2016: 73%
  - 2017: 76%

- Global
  - 2014: 65%
  - 2015: 68%
  - 2016: 68%
  - 2017: 74%

% who feel businesses and governments have potential to solve the challenges of greatest concern to Millennials

- Potential
  - Multinational companies: 89%
  - Individual countries / national governments: 83%
  - Local companies: 81%

- Made positive impact
  - Multinational companies: 74%
  - Individual countries / national governments: 68%
  - Local companies: 65%

- Determination
  - Multinational companies: 73%
  - Individual countries / national governments: 68%
  - Local companies: 65%

% who would approve political and business leaders thinking and speaking in the following ways

- Providing opinions with passion: 77%
- Using plain, straight-talking language: 75%
- Appealing to those who feel ‘left out’ or that their voice goes unheard: 67%
- Aiming for radical transformation rather than gradual change: 59%
- Focussing on local and national interests and rejecting the language and ideas of globalisation: 53%
- Taking controversial or divisive positions if it’s what they truly believe: 49%
The ripple effect

% have great deal/fair amount of accountability and influence upon the following:

<table>
<thead>
<tr>
<th>Area</th>
<th>Accountability</th>
<th>Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client / customer satisfaction</td>
<td>81%</td>
<td>64%</td>
</tr>
<tr>
<td>The working culture / atmosphere</td>
<td>79%</td>
<td>60%</td>
</tr>
<tr>
<td>General processes / ways of working</td>
<td>78%</td>
<td>61%</td>
</tr>
<tr>
<td>Overall reputation of the company</td>
<td>74%</td>
<td>53%</td>
</tr>
<tr>
<td>Ethical behaviour / organisational integrity</td>
<td>72%</td>
<td>51%</td>
</tr>
</tbody>
</table>

64%...of Millennials in South Africa feel ‘enabled to contribute to charities / good causes at work’

54%...compared with globally

Q18. Has your organisation enabled you to support or contribute to charities/‘good causes’ while at work? Q21. To what extent do you feel you have an influence on the following activities/issues? Q24. How much accountability do you take for the following? By accountability we mean the level of personal responsibility you feel you have for ensuring they happen to the highest possible standard. Base: South Africa: 200; Global 7900
Stability and loyalty

% who will stay with their current employer for...

<table>
<thead>
<tr>
<th>Change on 2016</th>
<th>Global</th>
<th>South Africa</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to two years</td>
<td>-6%</td>
<td>-11%</td>
</tr>
<tr>
<td>Over five years</td>
<td>+4%</td>
<td>+7%</td>
</tr>
</tbody>
</table>

% who would prefer full time vs freelance employment...

56% 65%

South Africa  Global

...of Millennials would prefer full time / permanent employment

43% 31%

South Africa  Global

...of Millennials would prefer freelance / consultative employment
Automation and flexibility

% who feel automation / robotics / artificial intelligence will improve / worsen the following

<table>
<thead>
<tr>
<th>Improvement</th>
<th>Worsening</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of jobs available to people like you</td>
<td>Improve: 36%</td>
</tr>
<tr>
<td>Overall productivity</td>
<td>Improve: 28%</td>
</tr>
<tr>
<td>Economic growth</td>
<td>Improve: 9%</td>
</tr>
<tr>
<td>Time people have to spend on creative / value-added activities</td>
<td>Improve: 12%</td>
</tr>
</tbody>
</table>

% say that flexible working practices have had a positive impact upon the following (top 5 areas of positive impact in South Africa)

- Your productivity: 72% improve, 80% worsen
- Your organisation’s ability to meet its objectives: 72% improve, 83% worsen
- Your wellbeing, health and happiness: 71% improve, 75% worsen
- Engagement with your work: 70% improve, 79% worsen
- Overall levels of morale / motivation: 69% improve, 75% worsen

Q27. What has been the impact of your organisation adopting flexible working practices?
Q32. Thinking about the future of the workplace (not just your organisation but in general) what impact do you think automation/robotics/artificial intelligence will have on the following? Base: South Africa 173; Those with flexible working provision in South Africa 173; Those with high provision of flexible working in South Africa 76; Global 7900
% think those aged 18 or younger will have the following impact as their presence in the workplace increases

South Africa

Global

- Positive (66%)
- Negative (0%)
- Neutral (3%)
- Don’t Know (13%)

Q38. Thinking of those aged 18 or younger, as this generation increases its presence in the workplace what do you think their overall impact will be...? Base: South Africa 200; Global 7900
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