

## **2019 Deloitte Global Millennial Survey**

A "generation disrupted"  
South Africa results

May 2019

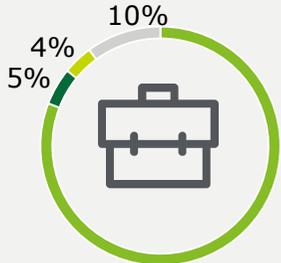
# Sample profile

## 300 Millennial interviews conducted in South Africa

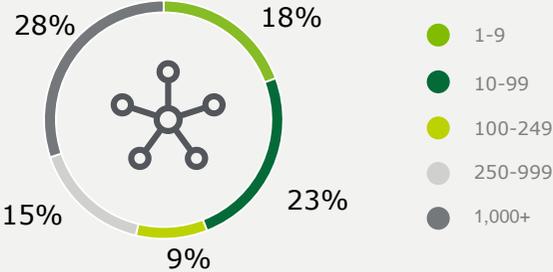
### Gender



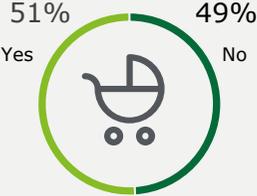
### Working status



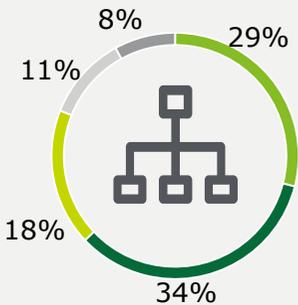
### Organization size\* (number of employees)



### Have children



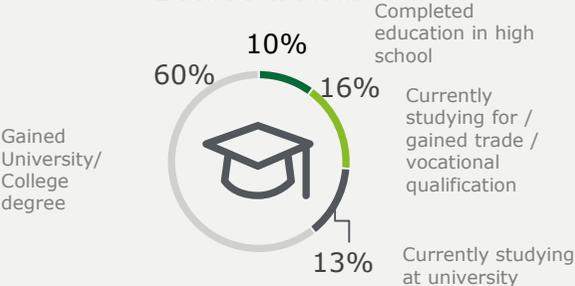
### Job seniority/level\*



### 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

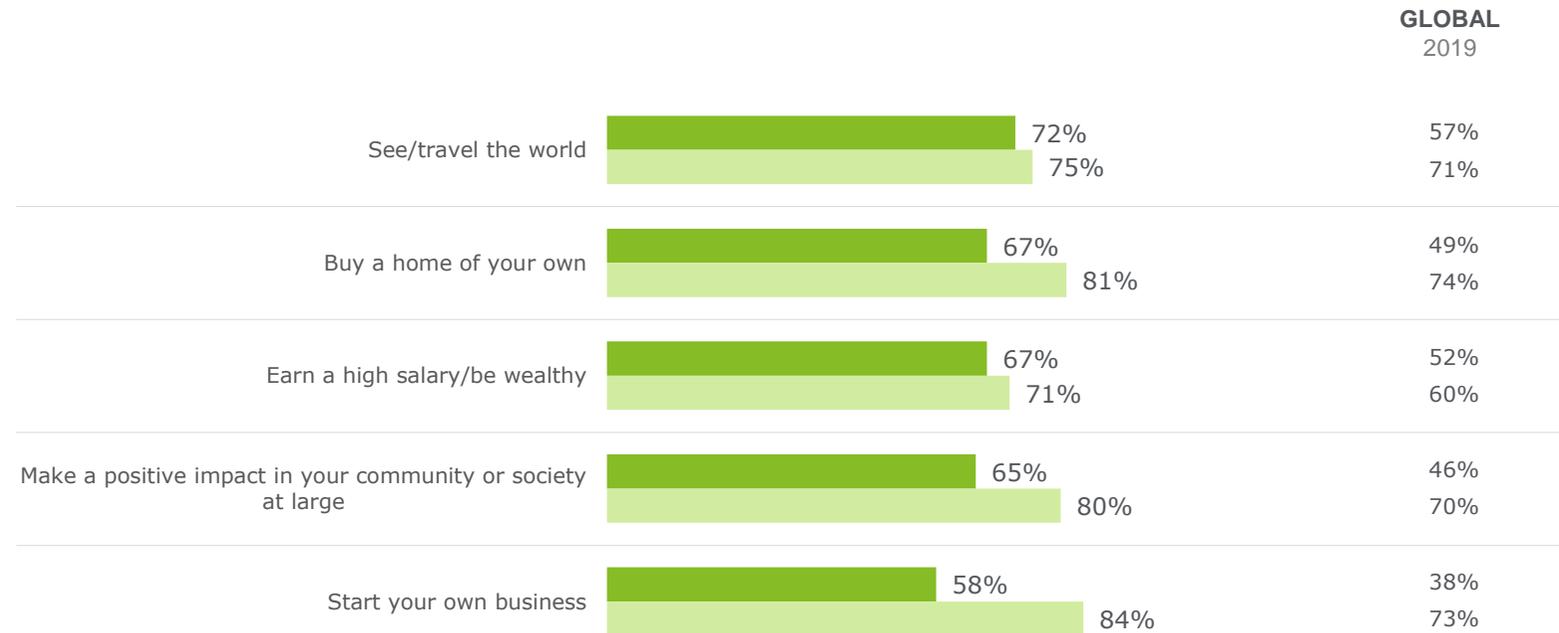
- Junior-level executive
- Mid-level executive
- Senior executive
- Head of department/division
- Senior management team/board

- 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)

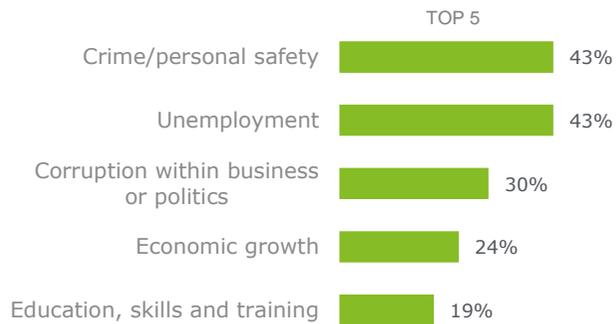
**17%** **29%**

South Africa

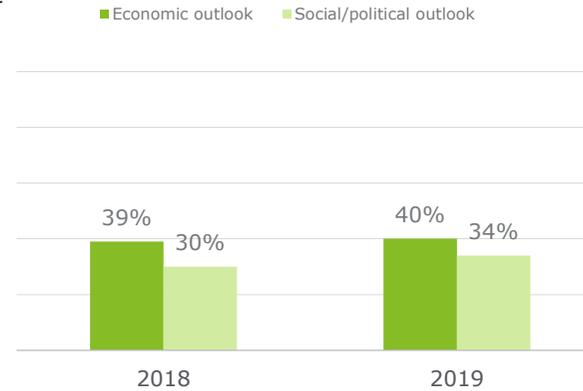
Globally

# 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'

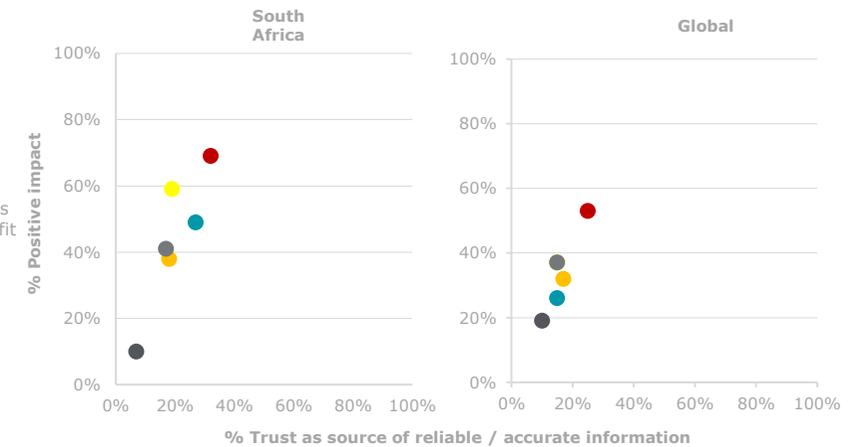
	South Africa	Global
Universities/science and research institutes	29%	27%
Business	26%	20%
Government	22%	29%
Charities/NGOs	10%	13%

% **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



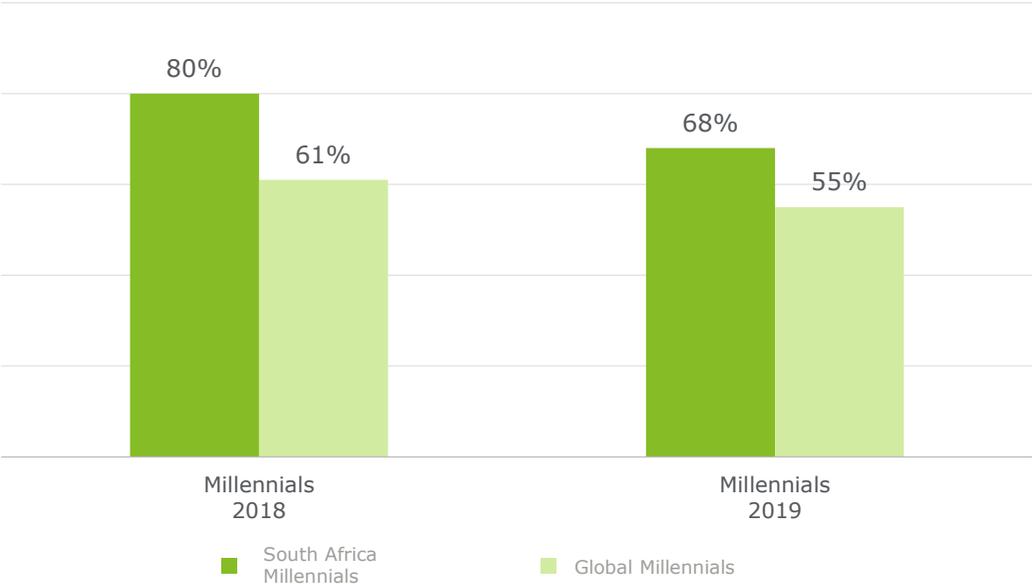
Q1. Thinking about the challenges facing societies around the world (including your own), which three of the following issues are you personally most concerned about? Please select up to three issues..Q17. In the future, who will be best able to solve the world's most pressing challenges? Choose one. 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

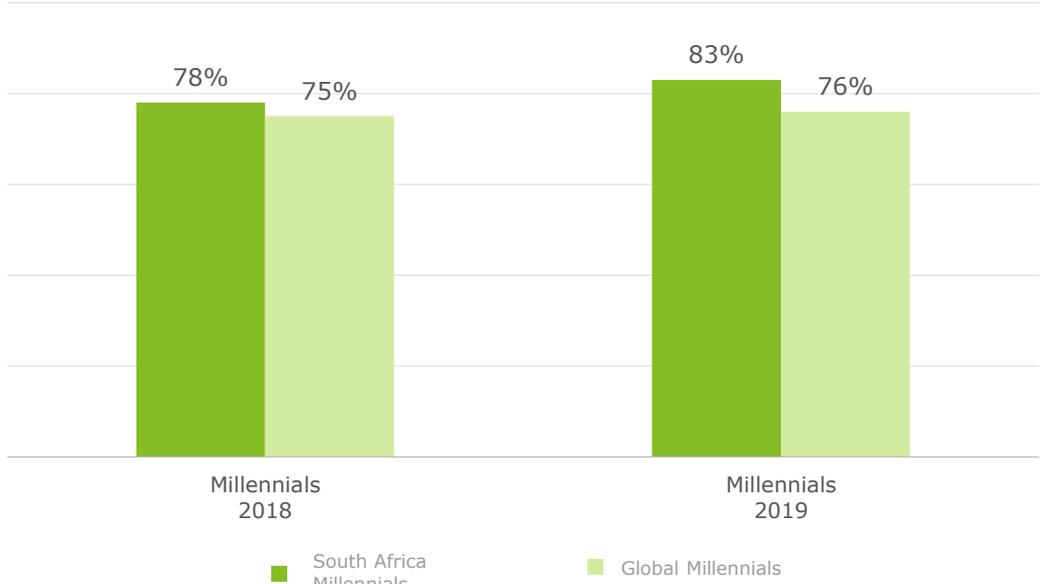
NOTE: Trend is indicative but not a true like for like comparison. 2018 based on degree-educated Millennials in full-time employment

# 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?  
 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

# 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%**

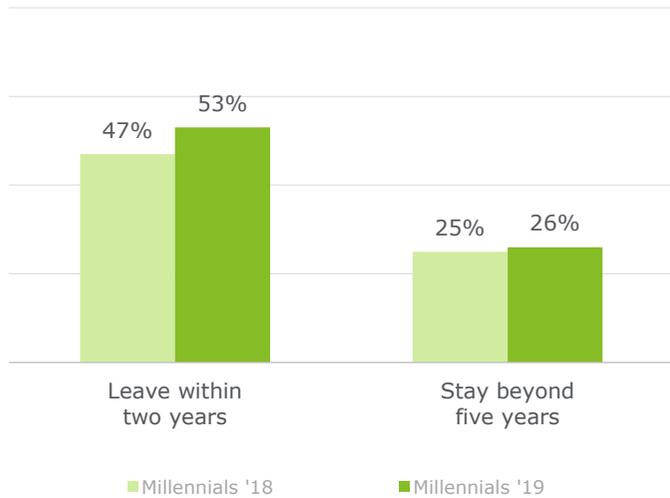
Millennials in South Africa / Globally  
**who are employed full / part time**

**68%**  
**65%**

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

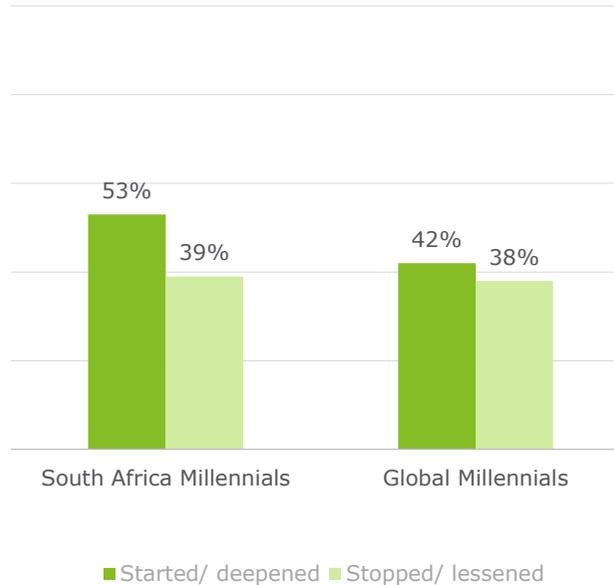
# Disrupted, but also disrupting

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



Global	Millennials
Leave in the next 2 years	<b>49%</b>
Stay beyond 5 years	<b>28%</b>

% 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	<b>96%</b>
Global	<b>84%</b>

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



**64%**

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



**60%**

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



**44%**

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



**55%**

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



**41%**

**GLOBAL 2019**

**% Millennials** concerned about...

		<b>GLOBAL 2019</b>
Being the victim of online fraud		79%
The security of the personal data that public bodies hold on you		70%
The security of the personal data that businesses hold on you		73%
The way in which organizations obtain personal information		76%

**% Millennials** agree...

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

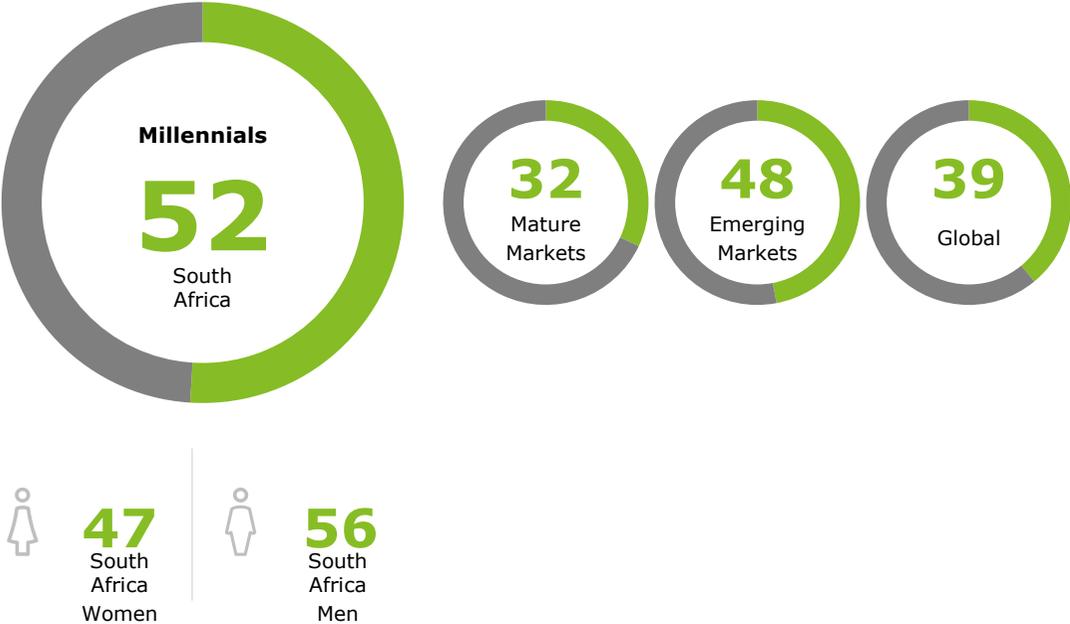
**% Millennials** who believe [institution] 'need to make more effort' to protect people's data and online security

		<b>GLOBAL 2019</b>
Government/regulators		54%
Tech companies		49%
Businesses who sell goods and services to people...		47%
Social media platforms		52%
Individuals		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 52, 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



# Key Contacts



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