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2021 Millennial & Gen Z Survey

A call for accountability and action | Brazil

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.



Two-thirds of millennials (69%) and Gen Zs (66%) think wealth and income is unequally distributed. Many believe government intervention will be needed to drive change. Nearly a third have supported politicians who want to reduce income inequality. Roughly 60% said legislation to limit the pay gap between senior executives and employees would significantly help, as would requiring a livable wage. And more than half of respondents said universal basic income would help.



Millennials and Gen Zs believe discrimination is widespread, likely enabled by systemic racism. One in five respondents feel personally discriminated against "all the time" or frequently because of an aspect of their backgrounds. Six in 10 Gen Zs and 56% of millennials said systemic racism is widespread in general society. They believe Individuals and activists are doing the most to reduce systemic racism, while the education system, legal system, government and business falls short of their potential to drive change.



High stress levels are driven by concerns about finances, family welfare, and job prospects. Almost half of Gen Zs and four in 10 millennials said they feel stressed all or most of the time. About two-thirds of respondents agreed that they often worry about their personal financial situations. Their families' welfare was also a main cause of stress for millennials. Uncertainty about jobs/career prospects was top for Gen Zs.



Stress and anxiety are prevalent in the workplace, and employers' efforts to support mental health are seen as inadequate. About a third of respondents (millennials 31%, Gen Zs 35%) said they've taken time off work due to stress caused by the pandemic. Yet about 40% have not felt comfortable disclosing the reason for their absence to their employer. Approximately 40% of millennials and Gen Zs feel their employers have done a poor job of supporting their mental well-being during the pandemic.



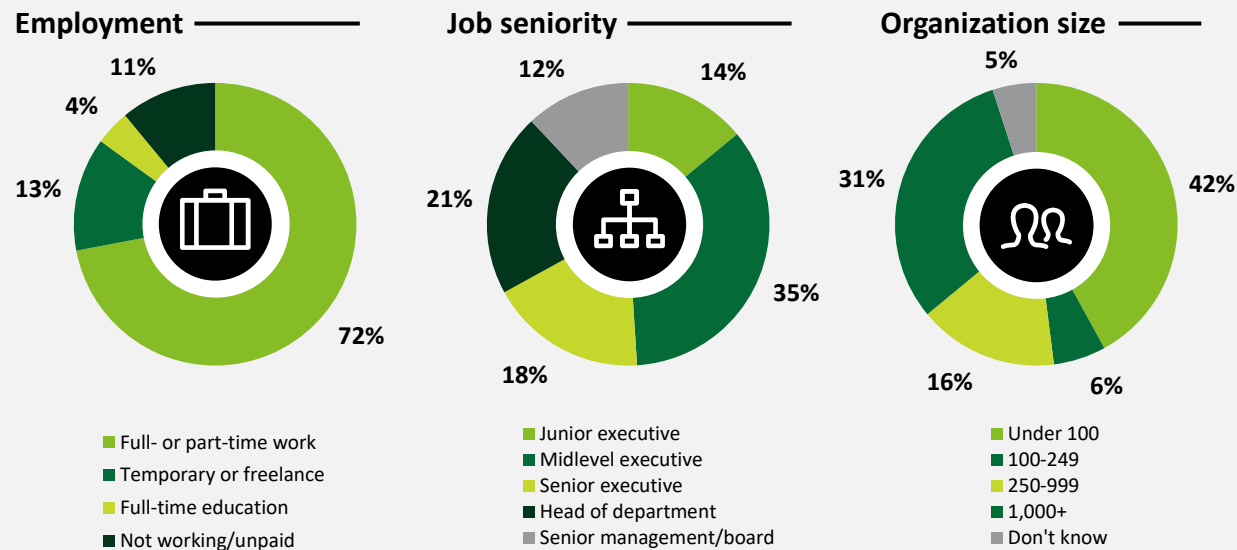
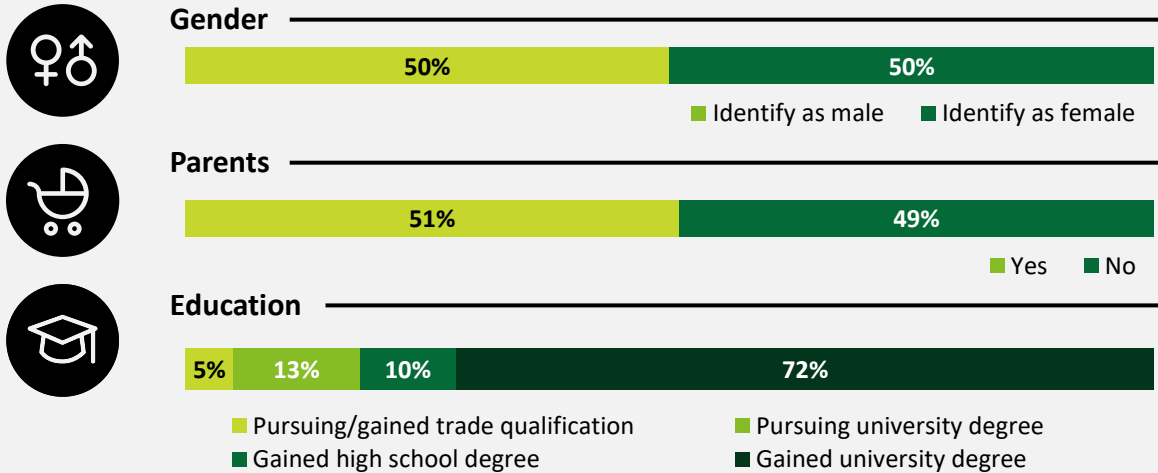
Views on business' social impact continues to decline; job loyalty slips. Continuing a steady decline over the last five years, less than half of millennials (47%) and Gen Zs (48%) think business is having a positive impact on society. This marks the first time these levels have fallen below 50% since this survey began in 2012. 62% of millennials agreed that businesses "have no ambition beyond wanting to make money." However, that figure is down slightly (four percentage points) from 2020. 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 **Brazil's millennials and Gen Zs** stand out from their global counterparts on these key themes.

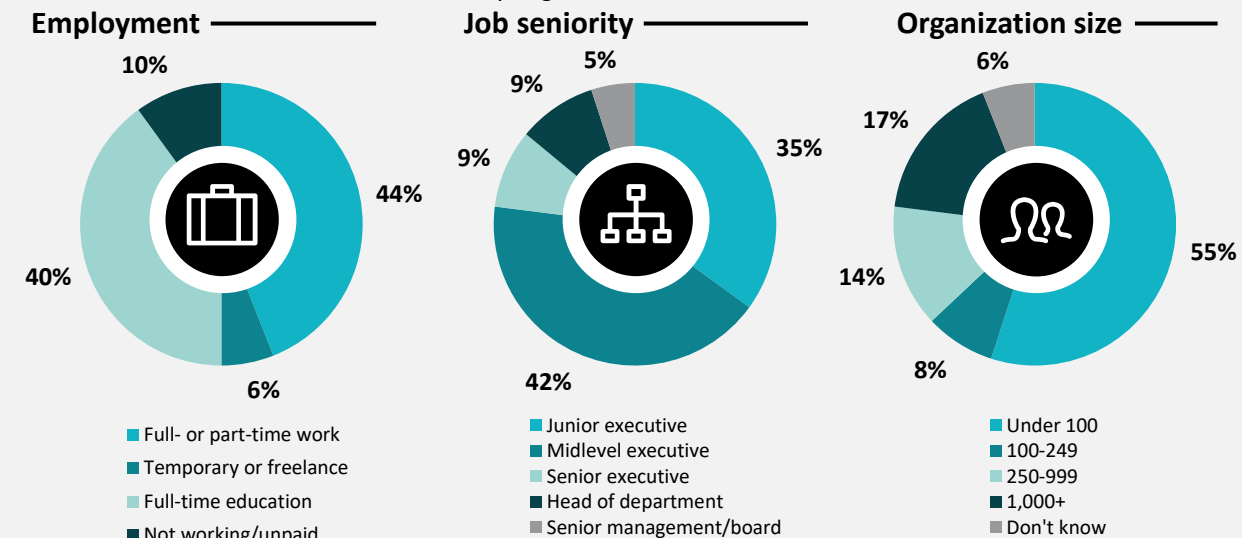
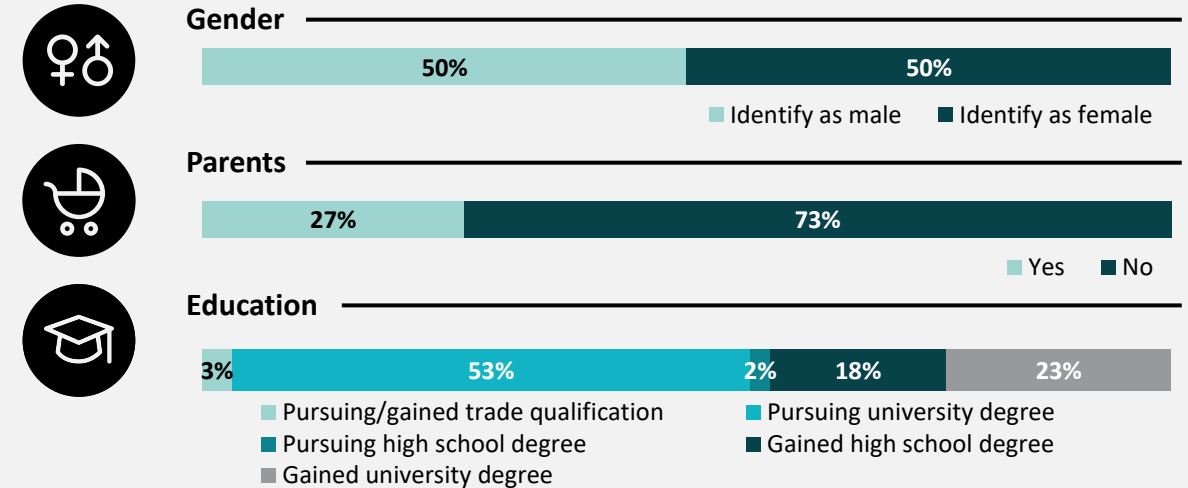
2021 MILLENNIAL SURVEY
Country profile: Brazil

800 total respondents in Brazil
500 millennials and 300 Gen Zs

MILLENNIAL PROFILE



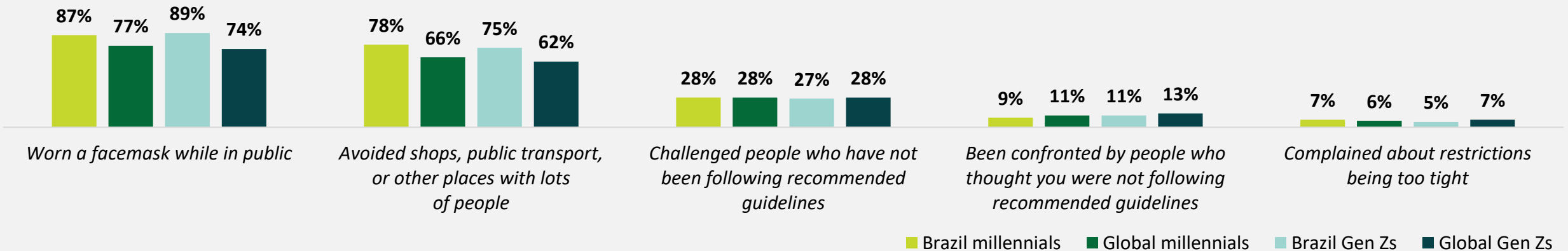
GEN Z PROFILE



The pandemic: Adherence to COVID-19 guidelines

- The majority of millennials and Gen Zs in Brazil have adhered to public health guidelines throughout the pandemic. They are even more likely than their global counterparts to have worn a facemask while in public or to have avoided shops, public transport, or other crowded places.

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

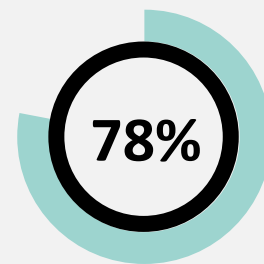


In your day-to-day life, how seriously do you follow your **government's public health guidelines** around the COVID-19 pandemic?*



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

vs.
69%
globally

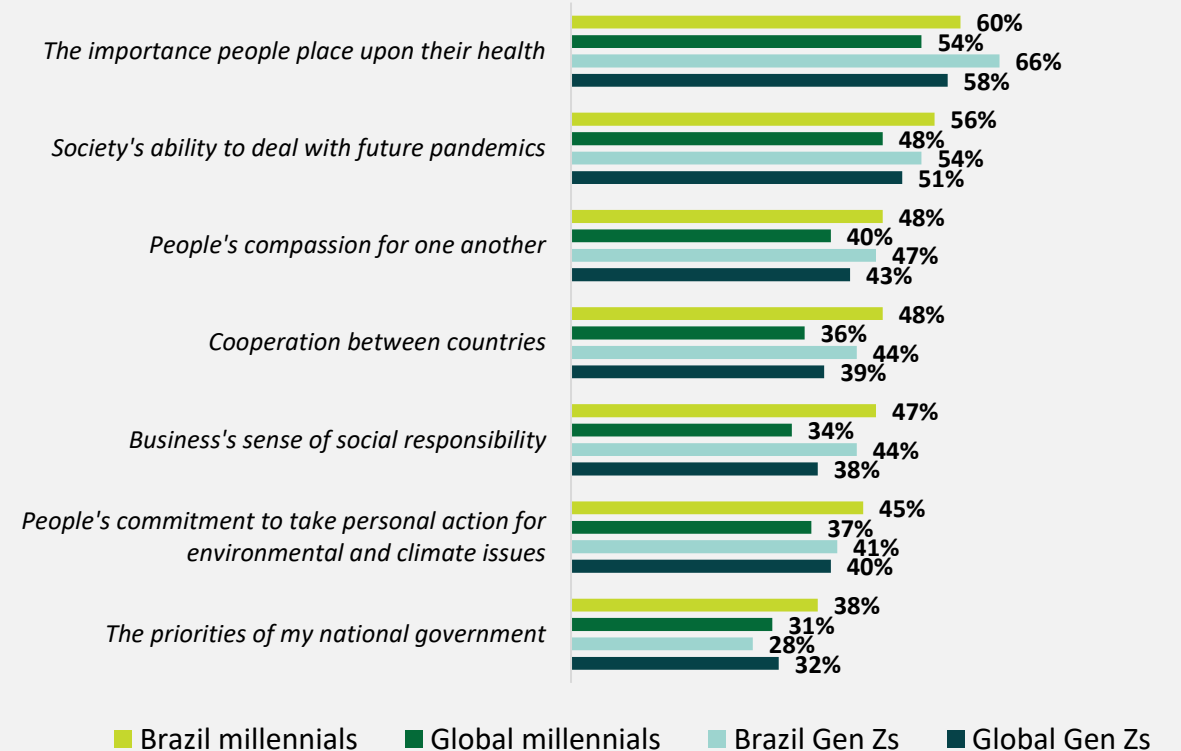
The pandemic: Reflecting on society and the future

- Compared to the global average, millennials and Gen Zs in Brazil are more likely to claim that the pandemic has inspired them to take positive actions to improve their own lives, and that it has highlighted new issues for them and made them more sympathetic toward the needs of others in their local communities.
- Millennials and Gen Zs in Brazil are less likely than their global counterparts to agree that there is now a strong sense that everyone around the world is ‘in this together.’
- In general, millennials and Gen Zs in Brazil, are more likely than their global peers to believe that people will place more importance on their health post-pandemic, that society is ready to deal with future pandemics, and that people will be committed to take personal action for environmental and climate issues.

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



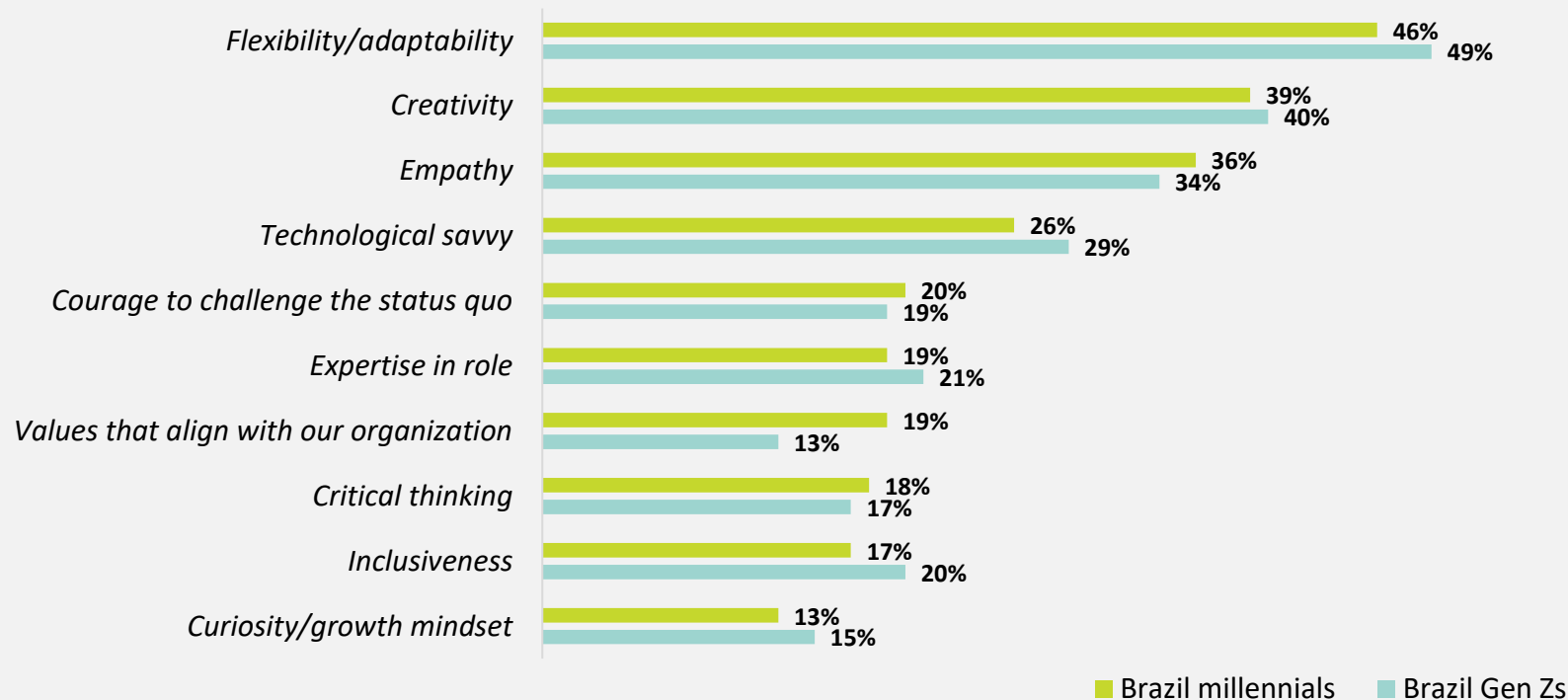
Percent of respondents who think the following will have changed for the better when the pandemic is finally over:



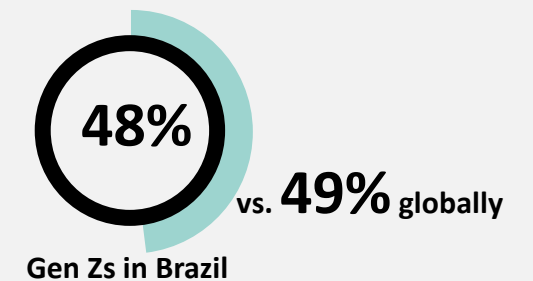
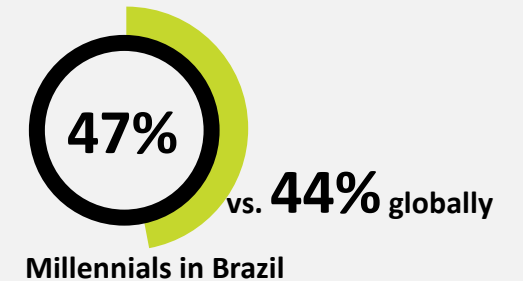
The future of work: Flexibility is key, but ethics are unbending

- Millennials and Gen Zs in Brazil agree that ‘flexibility/adaptability’ are the employee characteristics that are most critical to successful organizations, followed by creativity.
- 47% of Brazilian millennials and 48% Gen Zs claim their personal beliefs have influenced their choice of employer.

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:

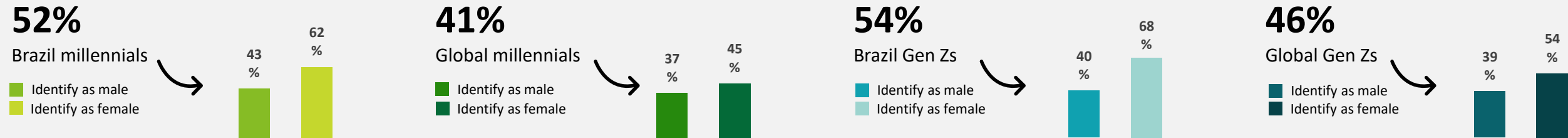


*Asked only of those in full-time, part-time or temporary employment

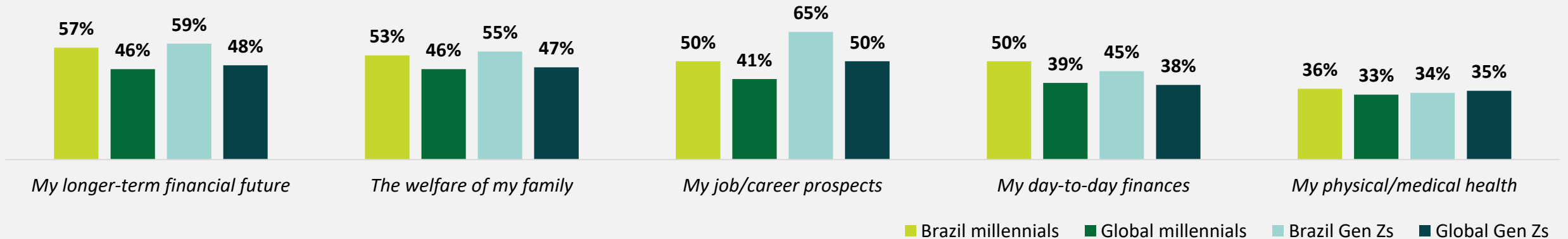
Mental health: Levels and sources of stress

- Stress and anxiety is even more prevalent for millennials and Gen Zs in Brazil than it is globally. More than half (52%) of Brazil’s millennials and Gen Zs (54%) say they are stressed all or most of the time.
- Their longer-term financial future and family welfare are the two most common causes of millennials’ stress. For Gen Zs the top stress drivers are job prospects and long term financial future.

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*:

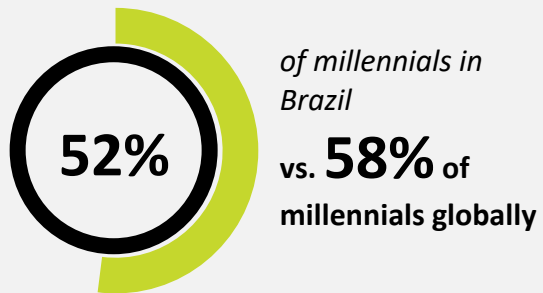


*Asked only of those who feel anxious or stressed

Mental health: Stress in the workplace

- Compared to the global average, millennials in Brazil seem to be slightly more open with their employers about pandemic-induced stress.
- However, the majority feel that their employer has not taken actions to support their mental well-being during the pandemic. Millennials in Brazil feel even less supported by their employers than Gen Zs do.

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*:

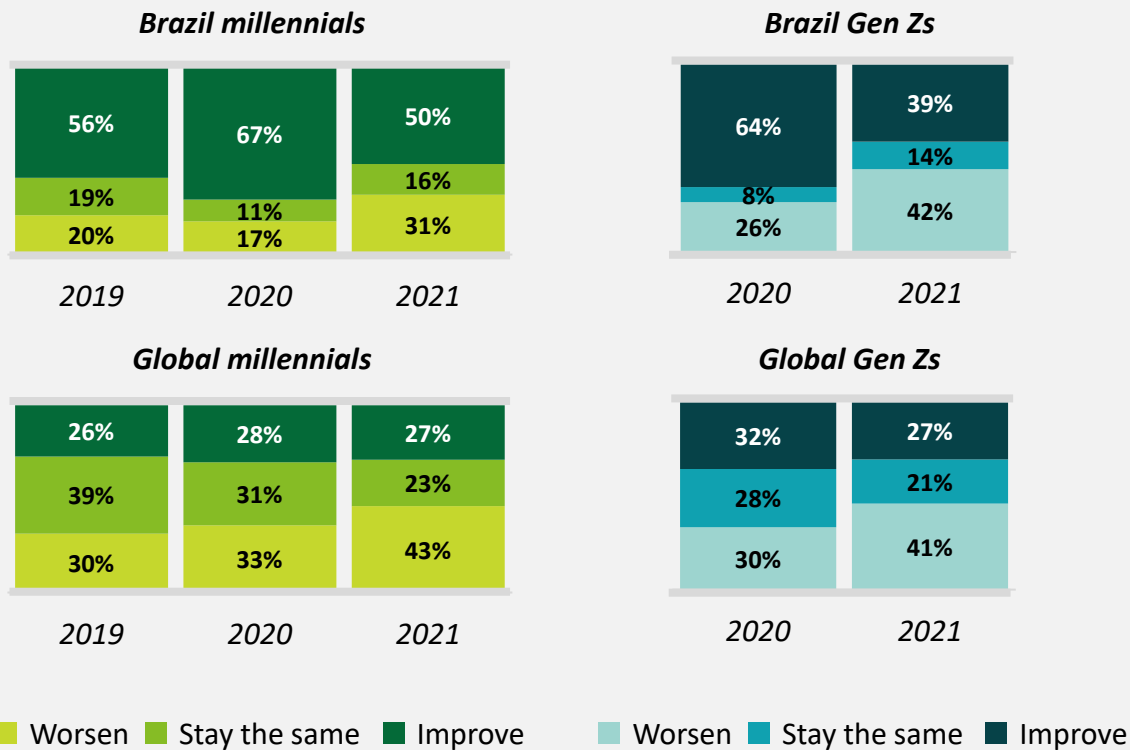


*Asked only of those in full-time, part-time or temporary employment

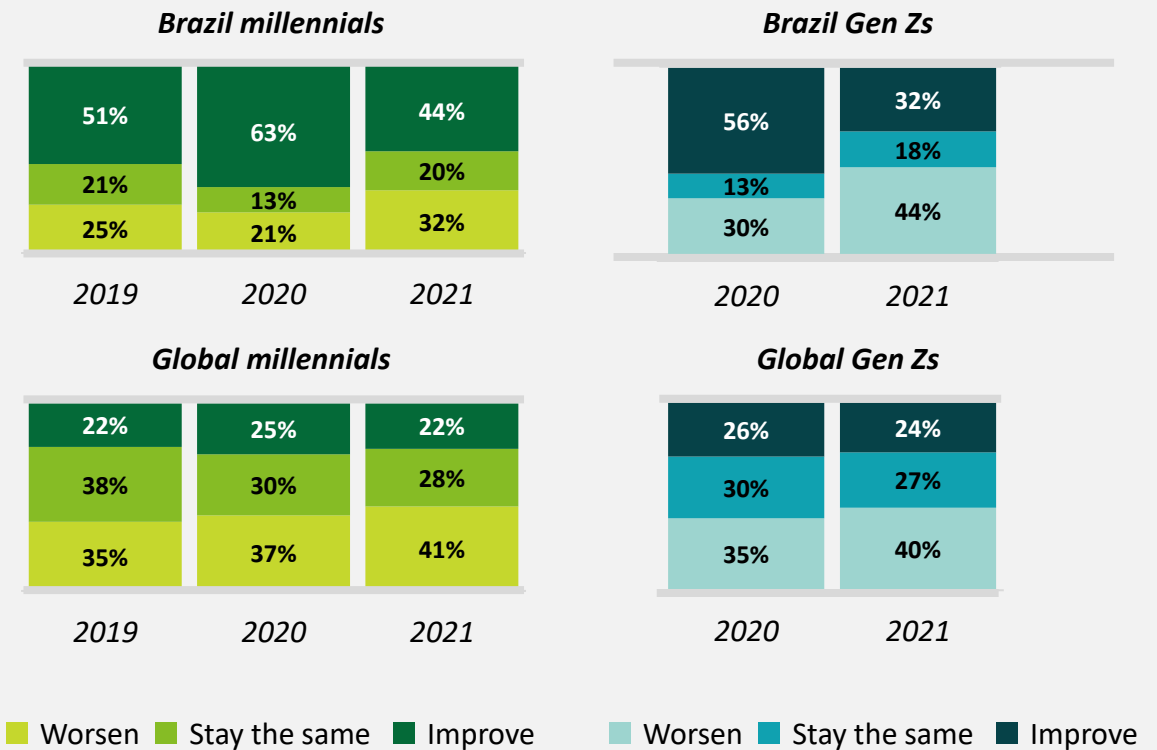
Economic and political outlook

- Millennials and Gen Zs in Brazil are less optimistic about the overall economic situation improving than they have been for the past two years. However, they are significantly more positive than their global peers. Half of millennials and 39% of Gen Zs in Brazil think the economic situation will improve versus 27% of millennials and Gen Zs globally.
- Millennials and Gen Zs in Brazil are also more downbeat about the overall sociopolitical situation improving than they have been in the past two years. But yet again, they are more optimistic than their global peers.

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?*

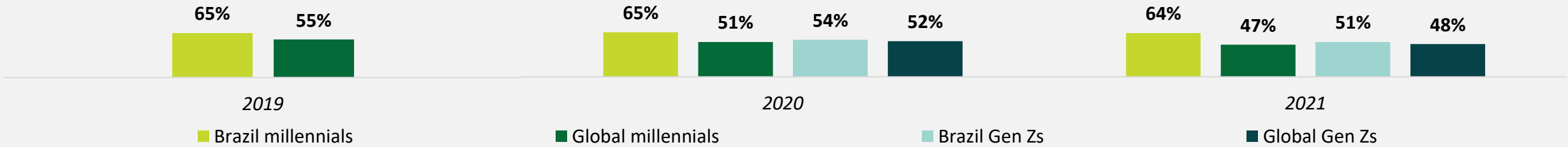


*Not asked in China

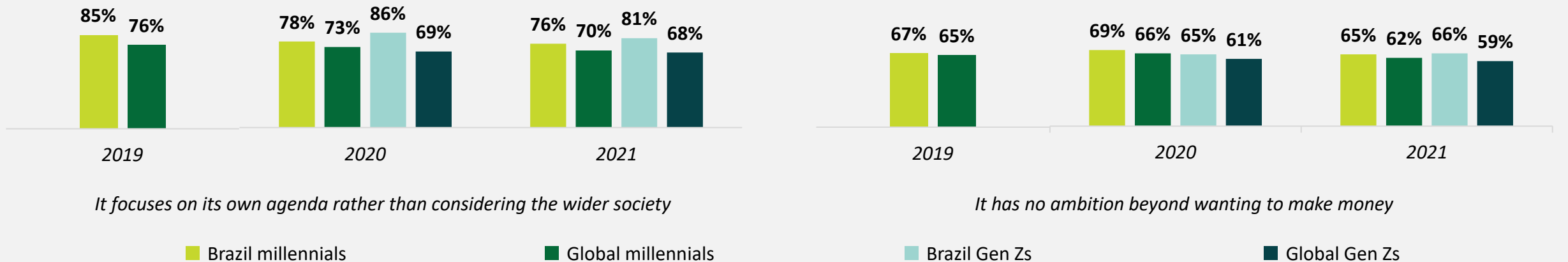
View of business

- Millennials in Brazil are more likely than the global average to think that businesses are having a positive impact on society.
- Yet, a majority of millennials and Gen Zs in Brazil agree that business' only focus on their own agendas, and have no ambition beyond wanting to make money. However, those figures have slipped slightly in the past year—focused on own agenda went from 78% of Brazil's millennials in 2020 to 76% in 2021; no ambition beyond wanting to make money went from 69% in 2020 to 65% in 2021.

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



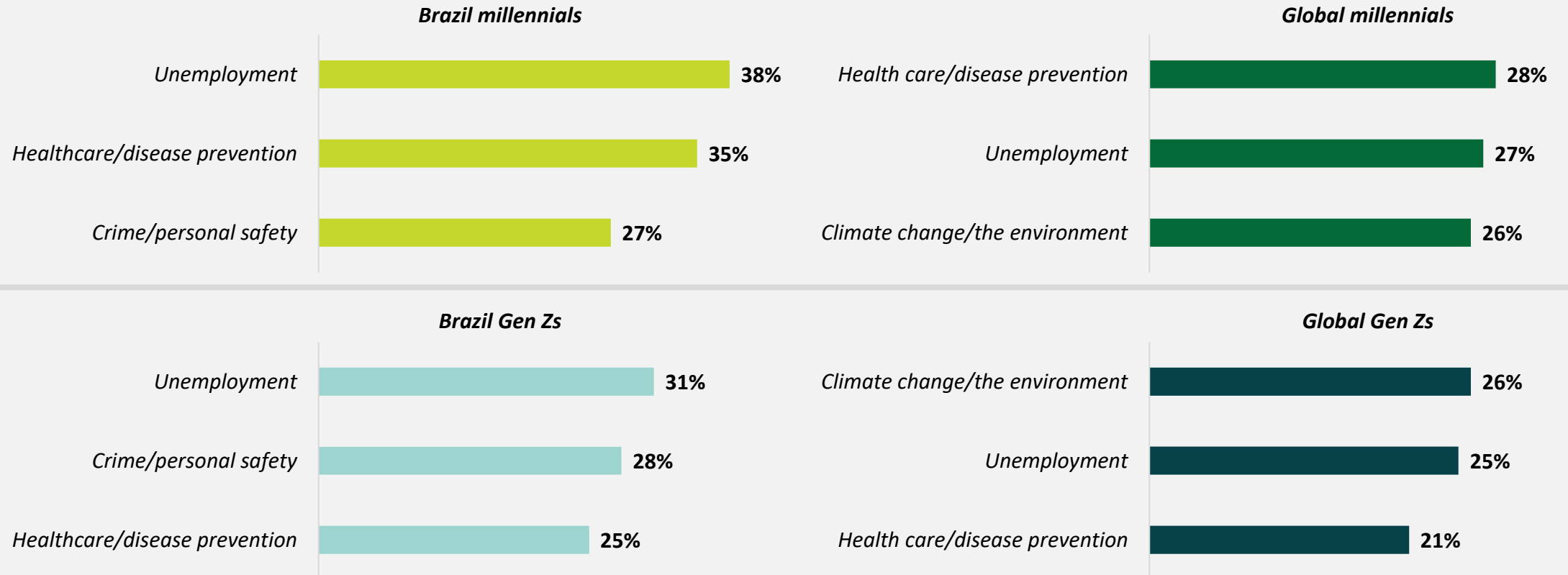
Percent of respondents who strongly agree or tend to agree that, on balance, the following describe business' current behavior:



Concerns: World challenges

- Unemployment, healthcare/disease prevention, and crime/personal safety are the top concerns for Brazil’s millennials and Gen Zs. In contrast to the top concerns of millennials and Gen Zs globally, the environment/climate change is not in the list of top 3 concerns.

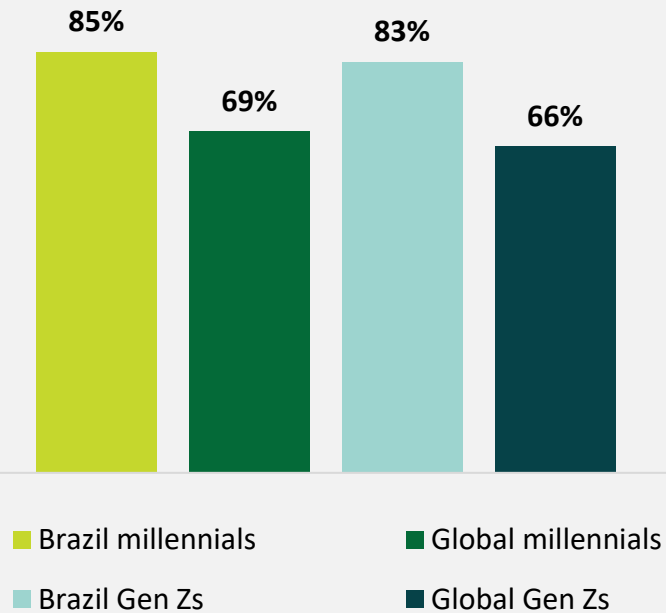
Top three issues of greatest concern:



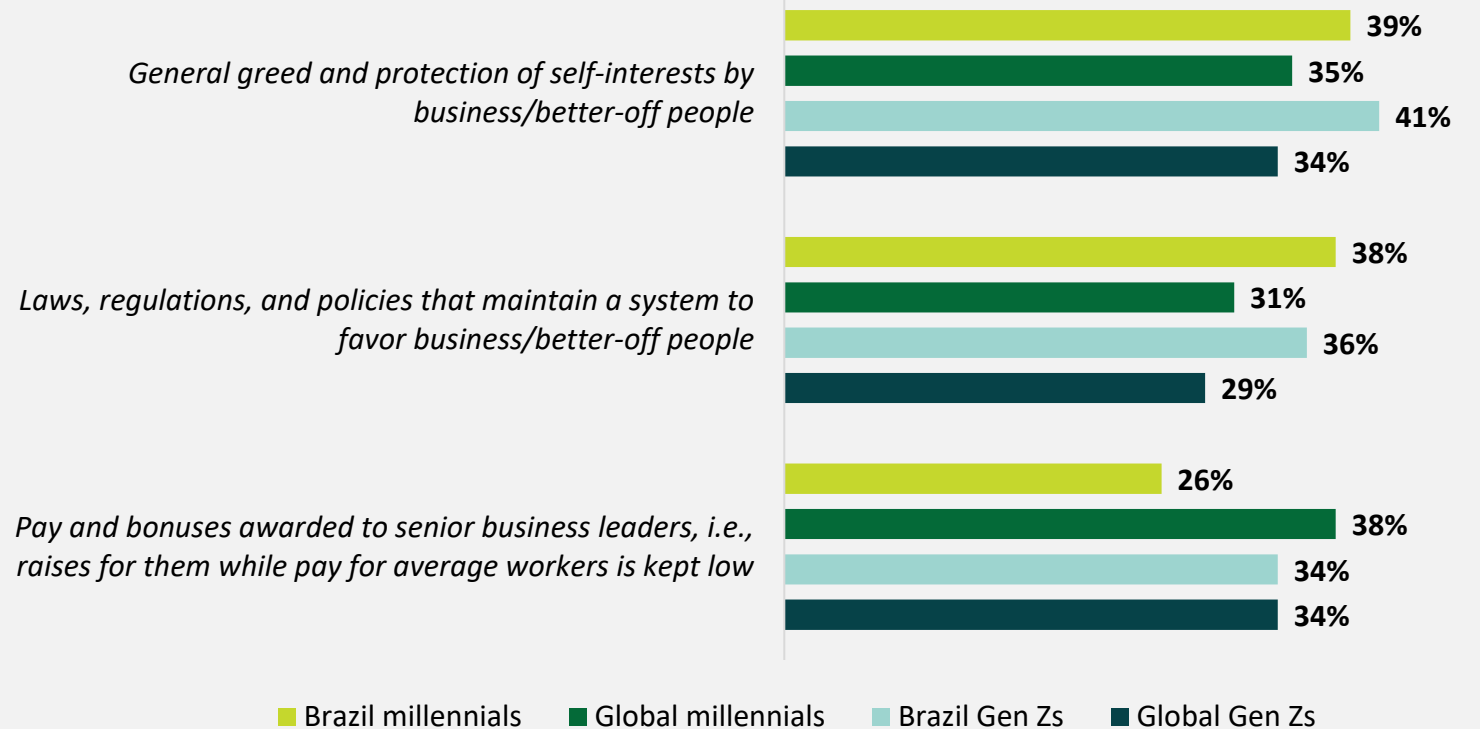
Concerns: Wealth and income inequality

- Millennials and Gen Zs in Brazil are significantly more likely to believe that wealth is unequally distributed in their country versus the global average.
- The general ‘greed’ and protection of self-interests by business/better-off people is considered the top factor for wealth inequality by millennials and Gen Zs in Brazil.

Percent of respondents who believe wealth is not very equally/not at all equally distributed among the people in your country:



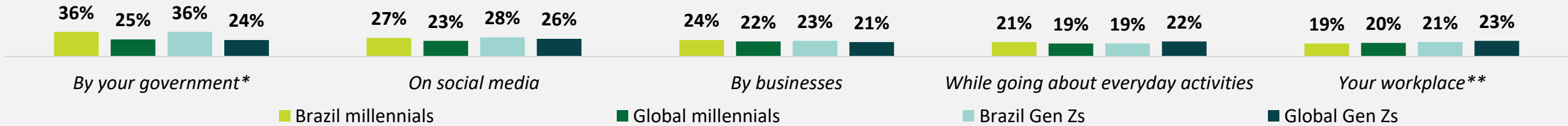
Which are the top factors behind income inequality? *Global top three*



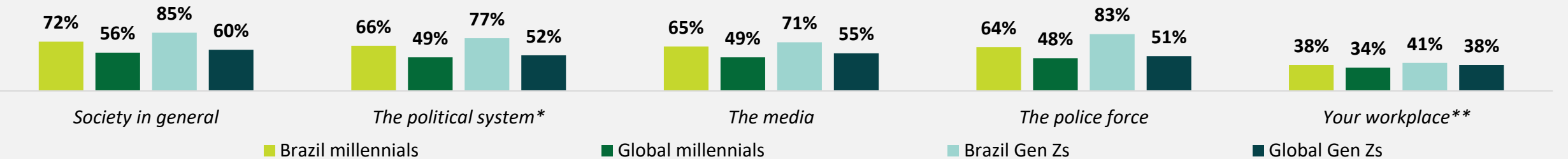
Concerns: Discrimination

- Millennials and Gen Zs in Brazil are slightly more likely than the global average to feel personally discriminated against by the government, businesses, and on social media. They are least likely to feel discriminated against while going about everyday activities and in their workplaces.
- Millennials and Gen Zs in Brazil are significantly more likely than the global average to believe that systemic racism is widespread within institutions.

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 within the following institutions:

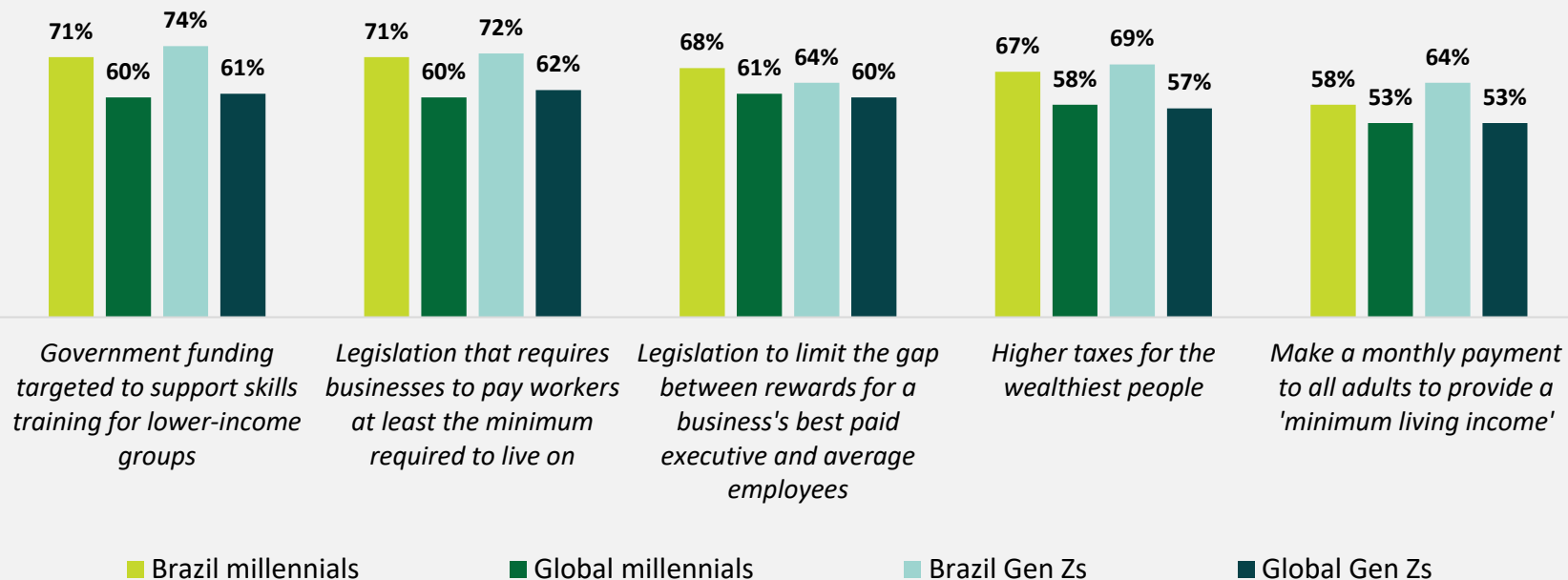


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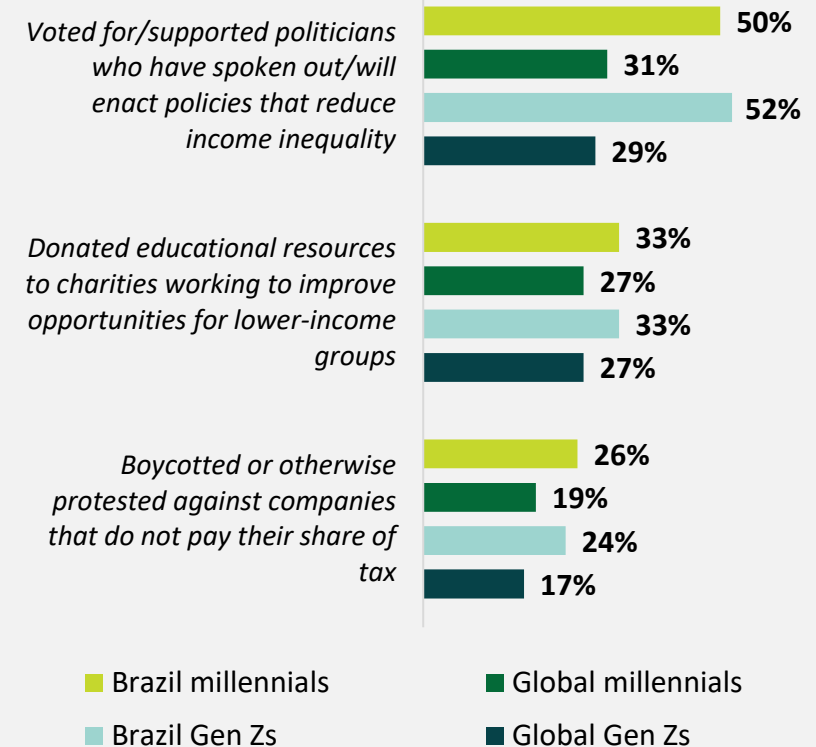
Time to act: Wealth and income inequality

- Millennials and Gen Zs in Brazil are more inclined to think that government intervention would help address wealth inequality compared to their global peers.
- Roughly half of millennials and Gen Zs in Brazil have actively voted for/supported politicians with policies around reducing income inequality.
- Compared to the global average, they are also more likely to have donated educational resources to charities working to improve opportunities for lower-income groups and to have boycotted or otherwise protested against companies that don't pay their fair share of tax

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



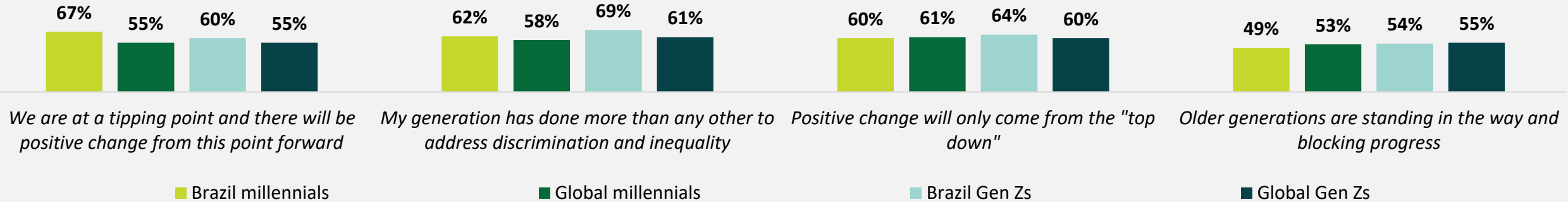
Which of these actions have you taken to help reduce income inequality in your country?



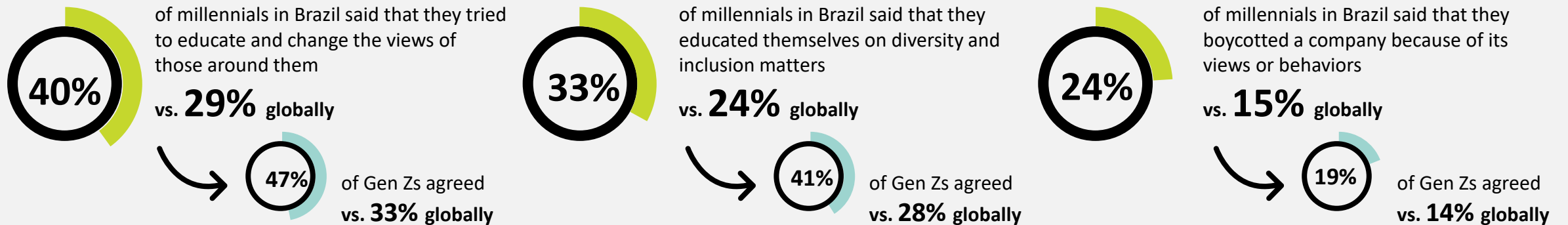
Time to act: Discrimination

- Millennials and Gen Zs in Brazil are more likely to believe that we are at a tipping point when it comes to discrimination and change is possible from this point forward.
- Brazil millennials and Gen Zs are more active in tackling discrimination across the board than their global counterparts.

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



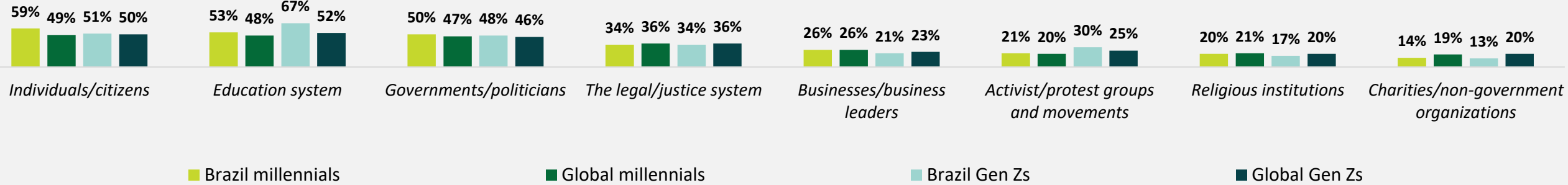
What actions have you taken to try to tackle discrimination?



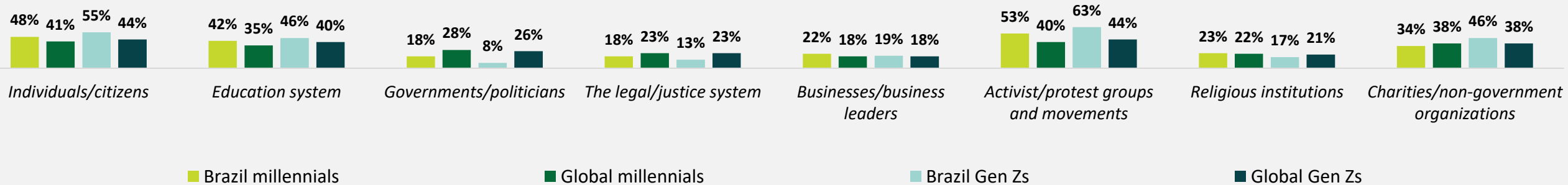
Time to act: Who is making a difference when it comes to fighting systemic racism?

- Millennials in Brazil concur that individuals have the greatest potential to address systemic racism, but they believe that activists and protest groups are the ones making the greatest effort. Gen Zs believe that the education system has the greatest potential, and agree with their millennial peers that activist groups are making the most effort.
- Millennials and Gen Zs in Brazil believe that the government/politicians, the legal system, and businesses are underdelivering on their potential to drive change.

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?*



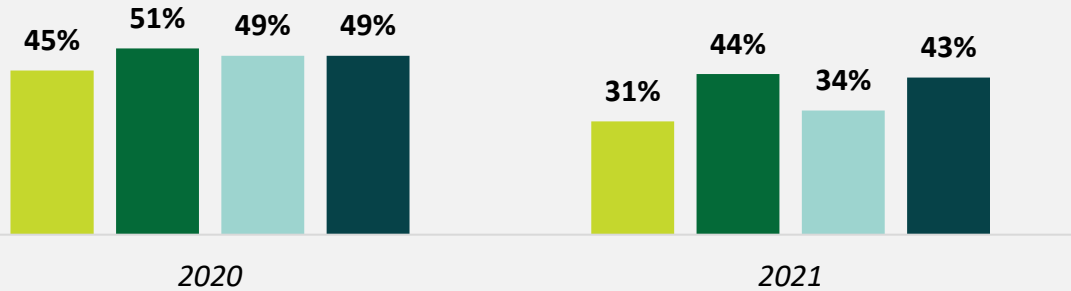
*Up to three options selected at both questions.

Time to act: The environment

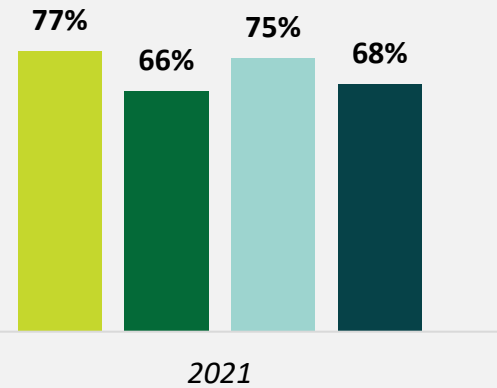
- The majority of millennials and Gen Zs in Brazil agree that the environmental changes seen during the pandemic make them more optimistic that climate change can be reversed; they are even more convinced of this than their global counterparts.
- More than 4 in ten millennials and Gen Zs in Brazil believe that people’s commitment to addressing climate change will improve post-pandemic.

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

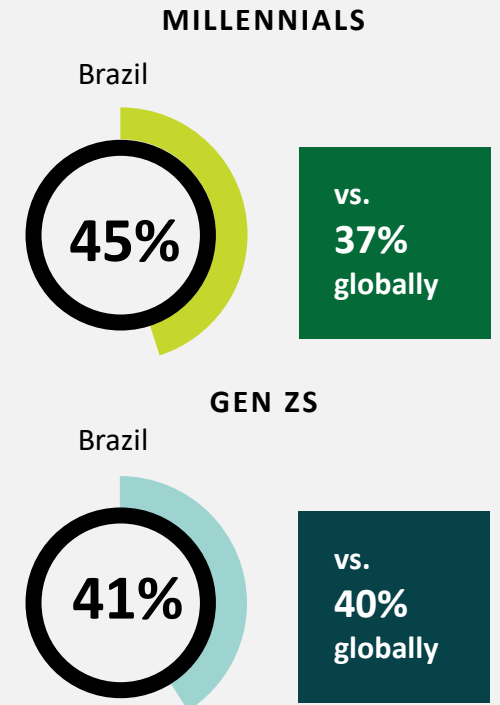


The environmental changes seen during the pandemic make me more optimistic that climate change can be reversed



■ Brazil millennials ■ Global millennials ■ Brazil Gen Zs ■ Global Gen Zs

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



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.

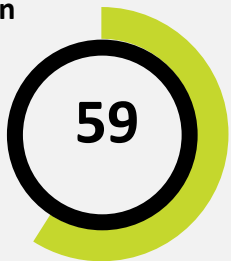
Scores are based on results from the following five questions and are aggregated to create a measure between zero and a hundred. This scale gives us the ability to compare not only year-to-year movement, but also regional and demographic groups within a given year.



MILLENNIALS:

Millennials in Brazil:

↓ -9 pts.



Identify as female:

59



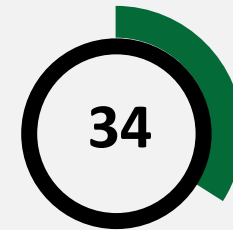
Identify as male:

58



Millennials globally:

↓ -3 pts.



Identify as female:

31



Identify as male:

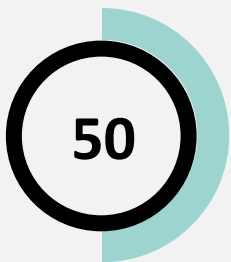
38



GEN ZS:

Gen Zs in Brazil:

↓ -13 pts.



Identify as female:

51



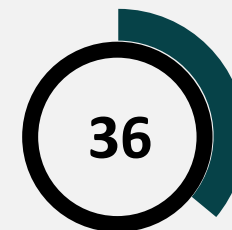
Identify as male:

48



Gen Zs globally:

↓ -3 pts.



Identify as female:

31



Identify as male:

40





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