

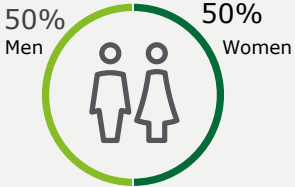
## **2019 Deloitte Global Millennial Survey** Switzerland results

June 2019

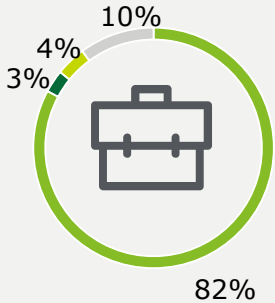
# Sample profile

## 319 Millennial interviews conducted in Switzerland

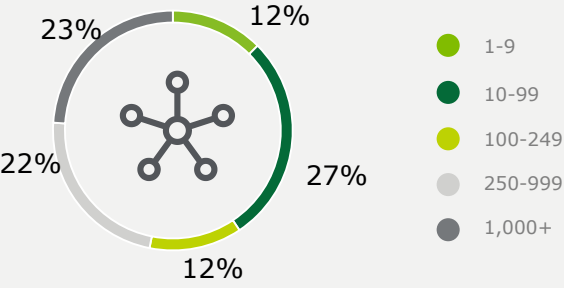
### Gender



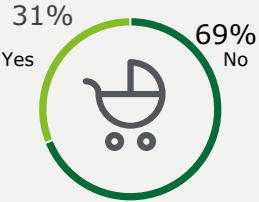
### Working status



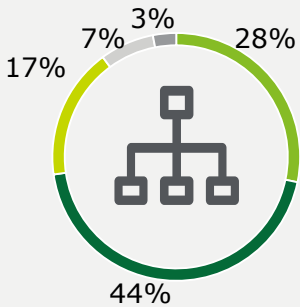
### Organization size\* (number of employees)



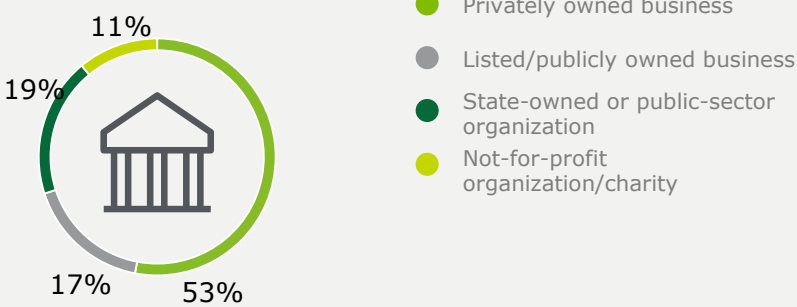
### Have children



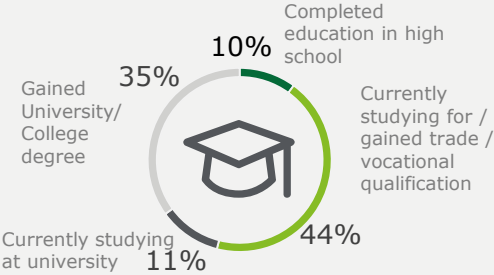
### Job seniority/level\*



### 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

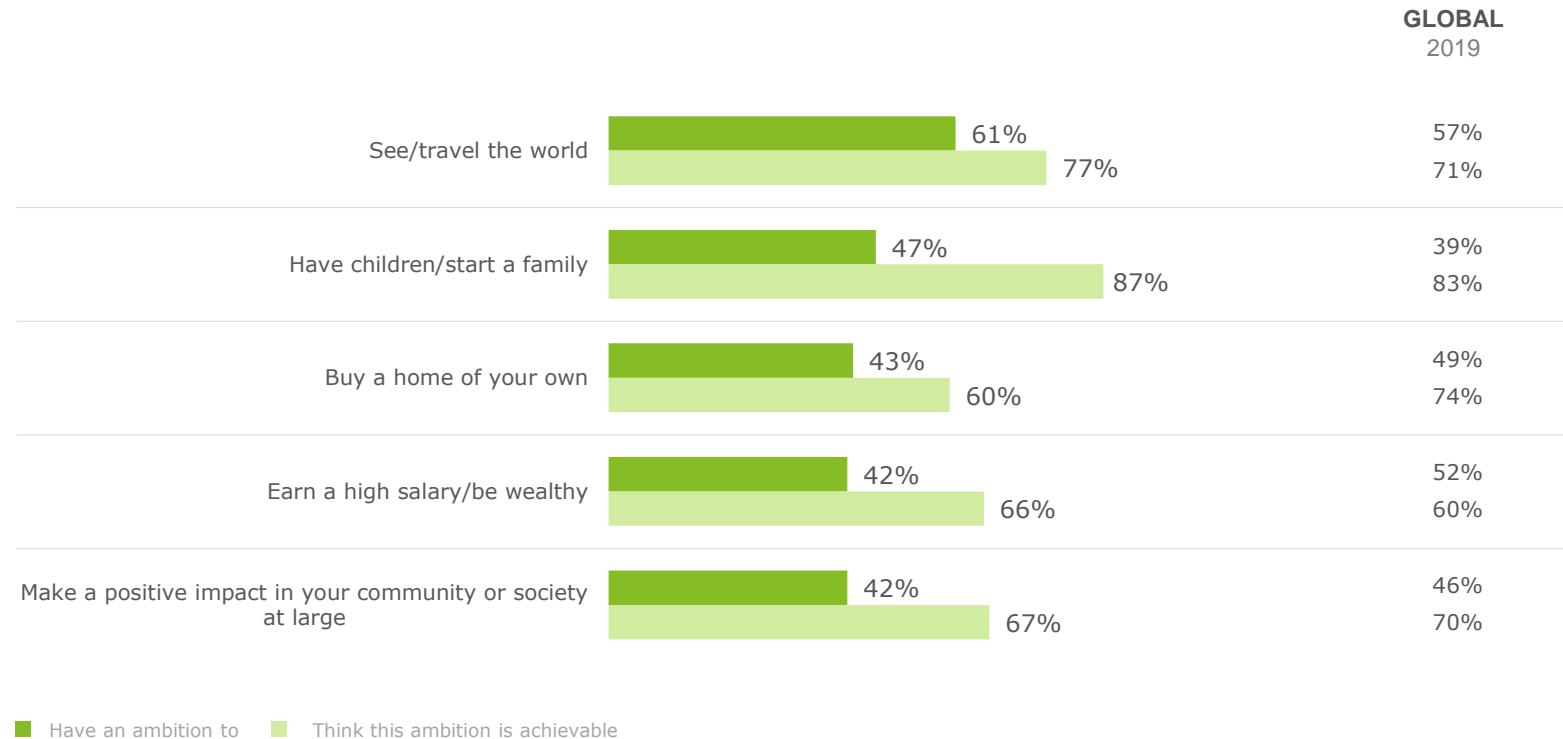
- 1-9
- 10-99
- 100-249
- 250-999
- 1,000+

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

# Altered aspirations

## Swiss Millennials put private ambitions first

### TOP 5 MILLENNIAL AMBITIONS



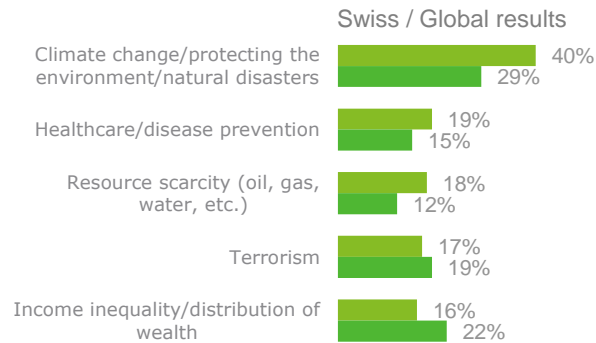
CLAIM THEY ARE 'SATISFIED' WITH THEIR LIFE NOWADAYS (8, 9 or 10 / 10)

**35%** **29%**  
 Switzerland      Globally

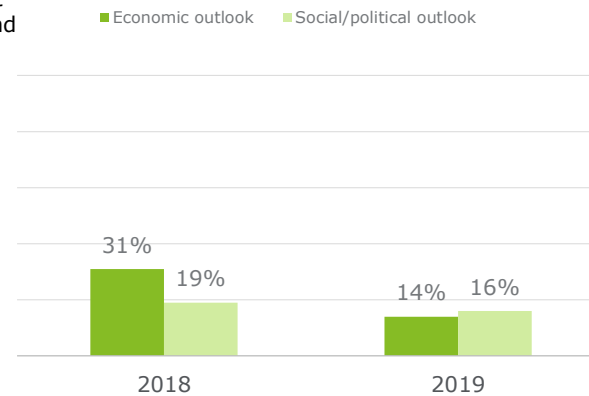
# View of the world

## Pessimism and low trust — climate change is an important issue in Switzerland

### % Millennials personally concerned about...



### % Millennials who say that the ... situation in Switzerland 'will improve' in the next 12 months...



GLOBAL 2019

**26%** Economic outlook  
**22%** Social/political outlook\*

\*Excludes China

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

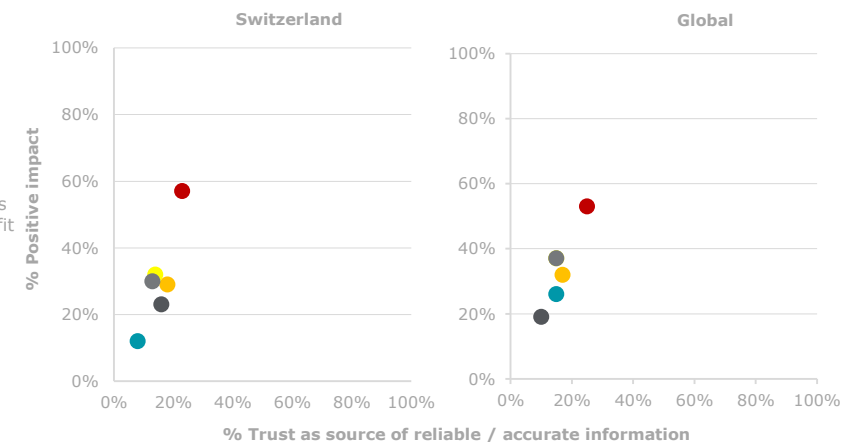
	Switzerland	Global
Government	30%	29%
Universities/science and research institutes	27%	27%
Business	18%	20%
Charities/NGOs	11%	13%

### % 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?

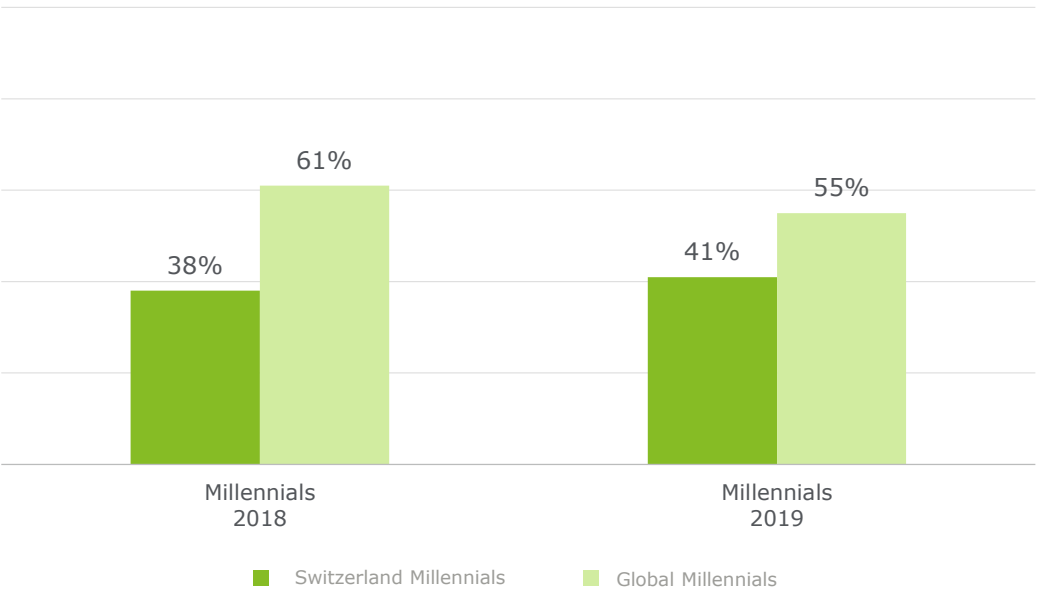
2019 Base: All Millennials in Switzerland 319, Globally 13,416  
2018 Base: All Millennials in Switzerland 337, Globally 10,455

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

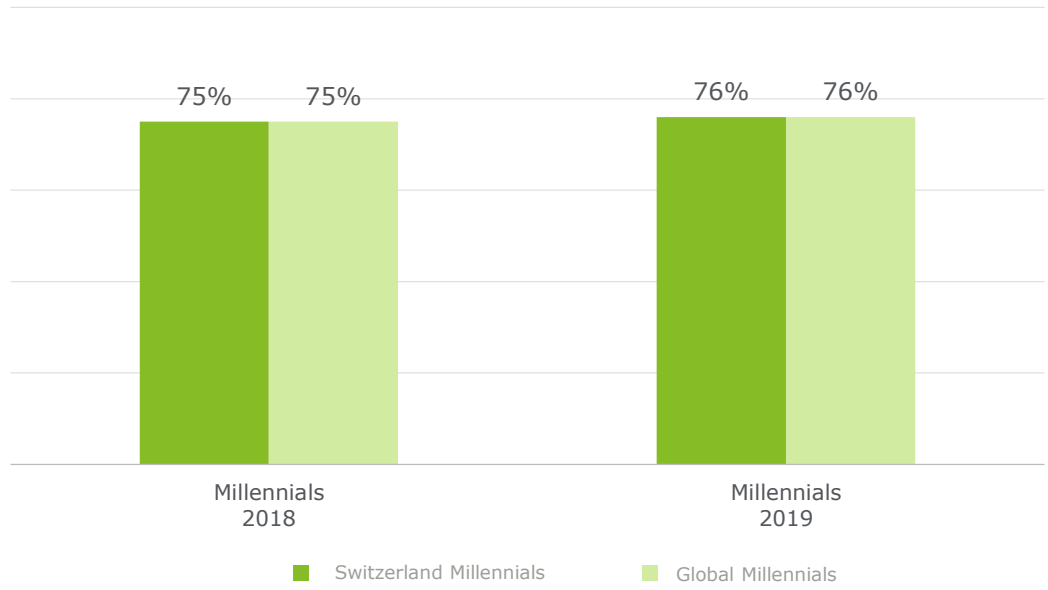
# Millennials on business: The good, the bad, the ugly

## Only minority of Swiss millennials sees positive impact of businesses

% 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 Switzerland 319, Globally 13,416  
 2018 Base: All Millennials in Switzerland 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 not working are sceptical about Industry 4.0



- Millennials in Switzerland
- Millennials Globally

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

**49%**

**46%**

Millennials in Switzerland / Globally  
**who are employed full / part time**

**69%**

**45%**

Millennials in Switzerland / 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**

**78%**

**81%**

Millennials in Switzerland / Globally  
**who are employed full / part time**

**66%**

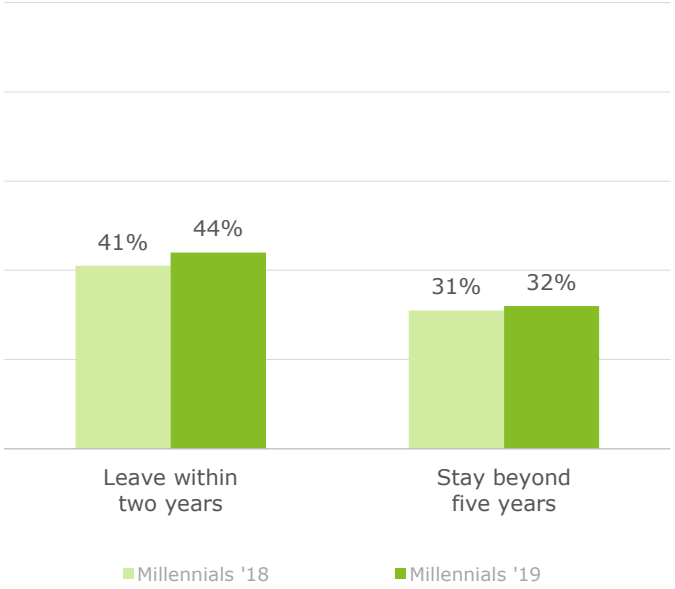
**65%**

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

# Disrupted, but also disrupting

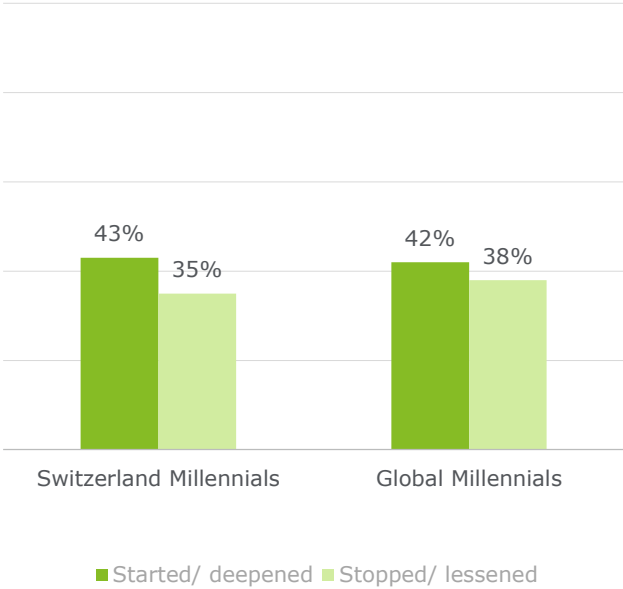
## Swiss Millennials more loyal to employer

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

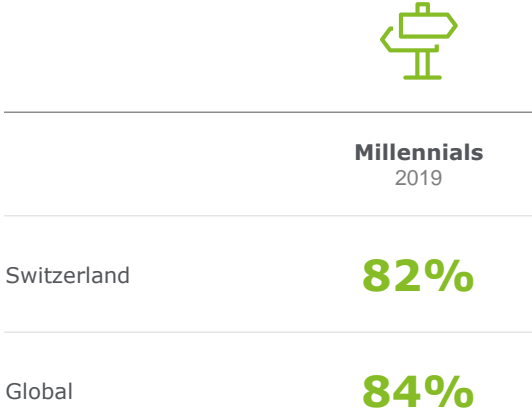


Global	Millennials
Leave in the next 2 years	<b>49%</b>
Stay beyond 5 years	<b>28%</b>

% 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



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 Switzerland 319, Globally 13,416  
 2019 Base: All Millennials in work in Switzerland 263, Global 10,736 2018 Base: All Millennials in work in Switzerland 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: More foe than friend

## Half of Swiss millennials want to stop using social media

**% 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



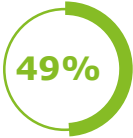
**44%**

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>
The way in which organizations obtain personal information	76%	76%
The security of the personal data that businesses hold on you	67%	73%
Being the victim of online fraud	66%	79%
The security of the personal data that public bodies hold on you	65%	70%

**% Millennials** agree...

		<b>GLOBAL 2019</b>
I feel I have no control over who has my personal data or how they use it	76%	75%
To get the most from technology, we must be prepared to share some of our personal details	53%	62%
The benefits of technology outweigh the risks associated with sharing my personal data	51%	61%

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

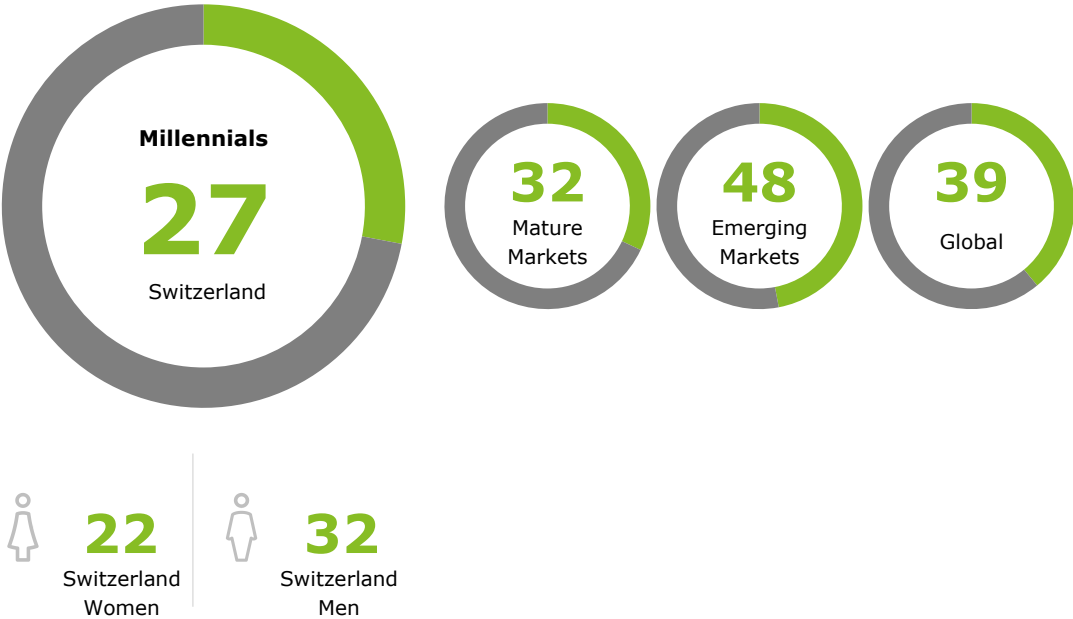
		<b>GLOBAL 2019</b>
Social media platforms	58%	52%
Government/regulators	56%	54%
Tech companies	53%	49%
Businesses who sell goods and services to people...	46%	47%
Individuals	43%	40%



# The MillZ Mood Monitor I

## Swiss millennials are lower on the mood index than most mature markets

The "MillZ Mood Monitor" tracks respondents' year-over-year optimism about key political, personal, environmental and socioeconomic topics. Scores are based on responses related to economic, social/political, personal, environmental and business sentiments.

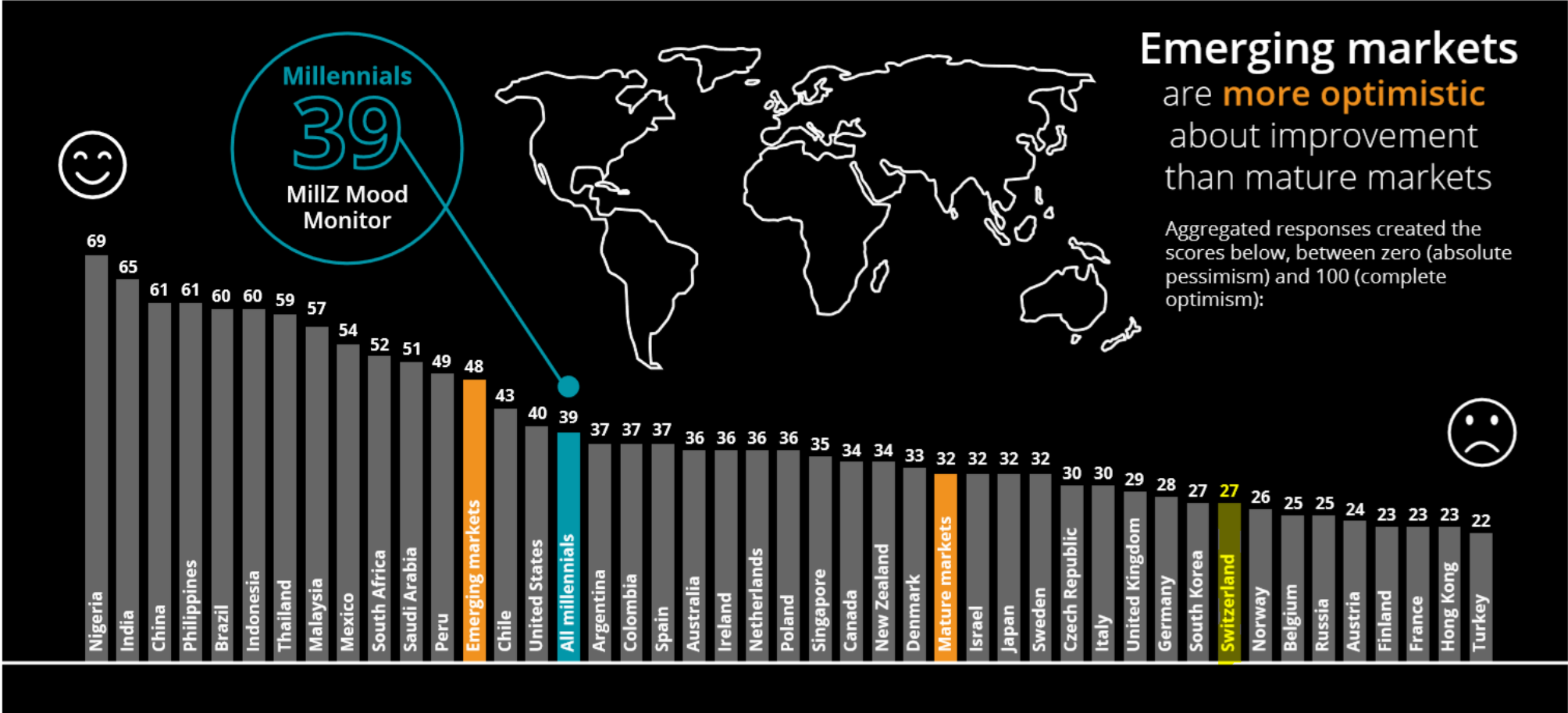


Scores are based on results from the following five question topics that are aggregated to create a measure of between zero and a hundred. This scale gives us the ability to compare not only year-to-year movement, but also regional and demographic groups within a given year



# The MillZ Mood Monitor II

## Swiss millennials quite pessimistic about improvements

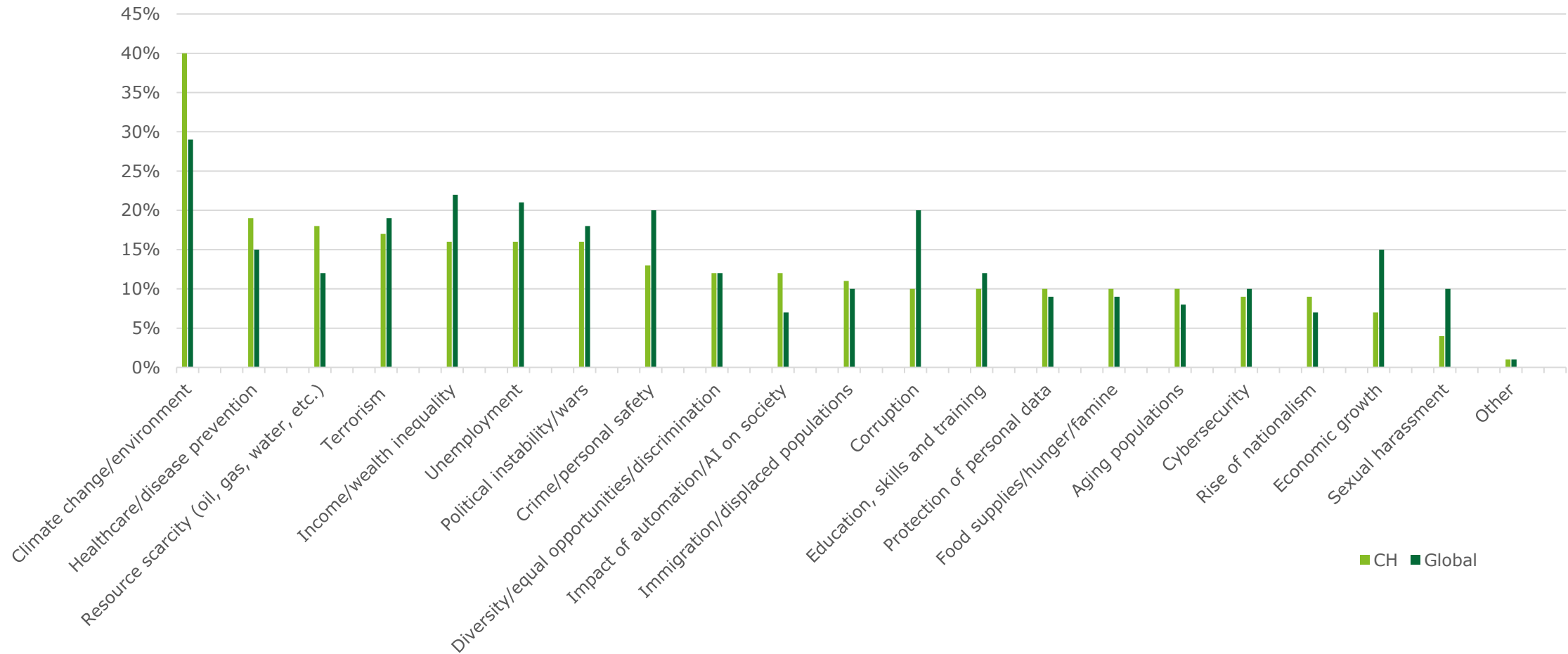


Base: All millennials 13,416, emerging markets 6,069, mature/Western markets 7,347, per country 319

# Top concerns

## Swiss millennials see climate change as biggest issue

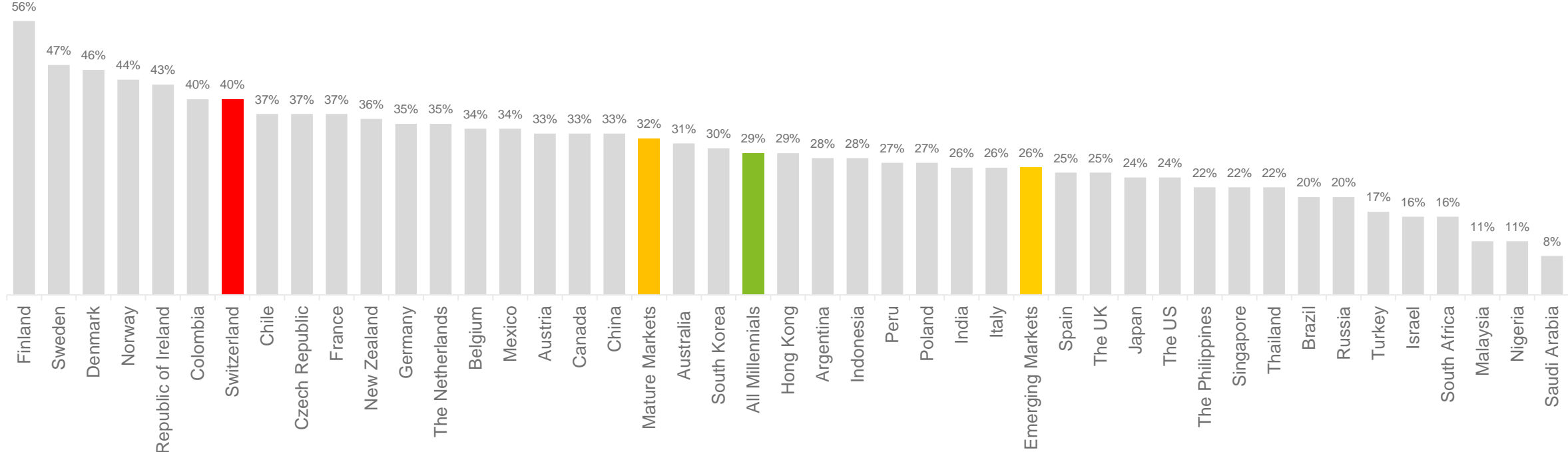
Percentage of Millennials per issue: Question: "Thinking about the challenges facing societies around the world (including your own), which three of the following issues are you personally most concerned about? Please select up to three issues.»



# Climate Change

## Swiss millennials amongst the most concerned

Percentage of Millennials selecting "Climate change / protecting the environment / natural disasters" from list of 21 challenges facing societies around the world.

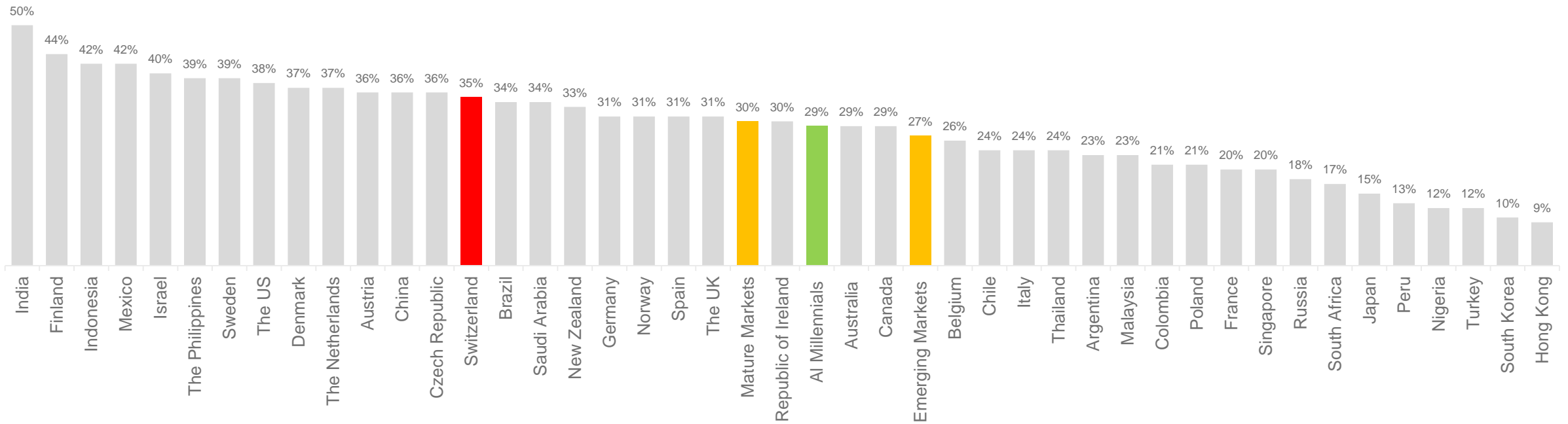


Base: Q1. Thinking about the challenges facing societies around the world (including your own), which three of the following issues are you personally most concerned about? Please select up to three issues

# Life satisfaction

## Swiss millennials clearly above average

Percentage of Millennials giving score of 8, 9 or 10 to the following question: "Overall, how satisfied are you with your life nowadays?" Rate from from 0 to 10.



Base: All Millennials 13,416, Emerging Markets 6,069, Mature / Western Markets 7,347



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