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2021 Millennial and Gen Z Survey

A call for accountability and action | South Africa

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.



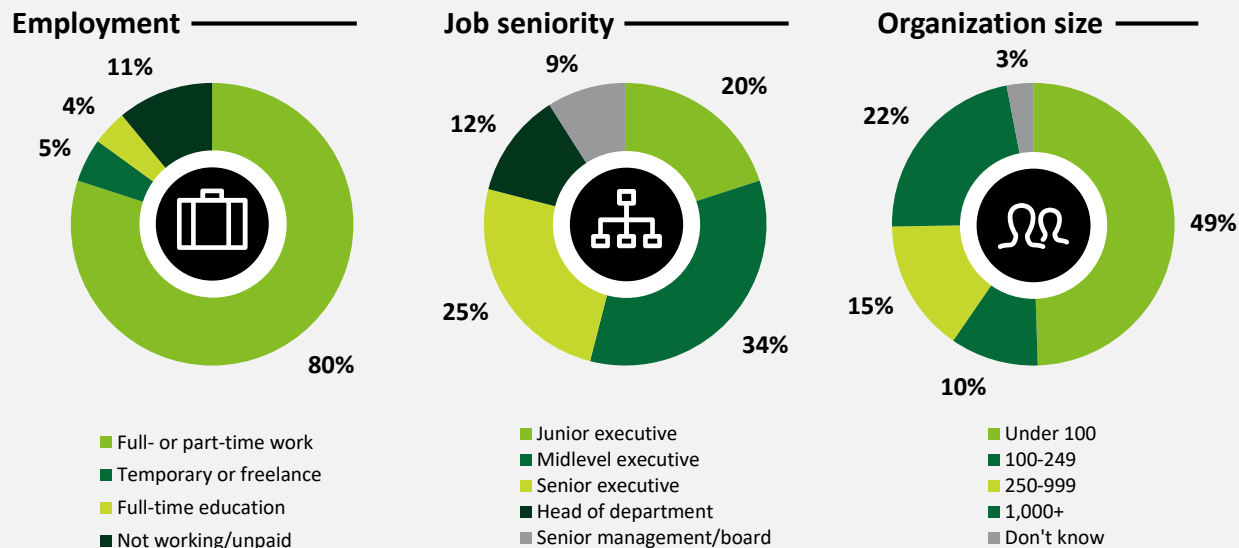
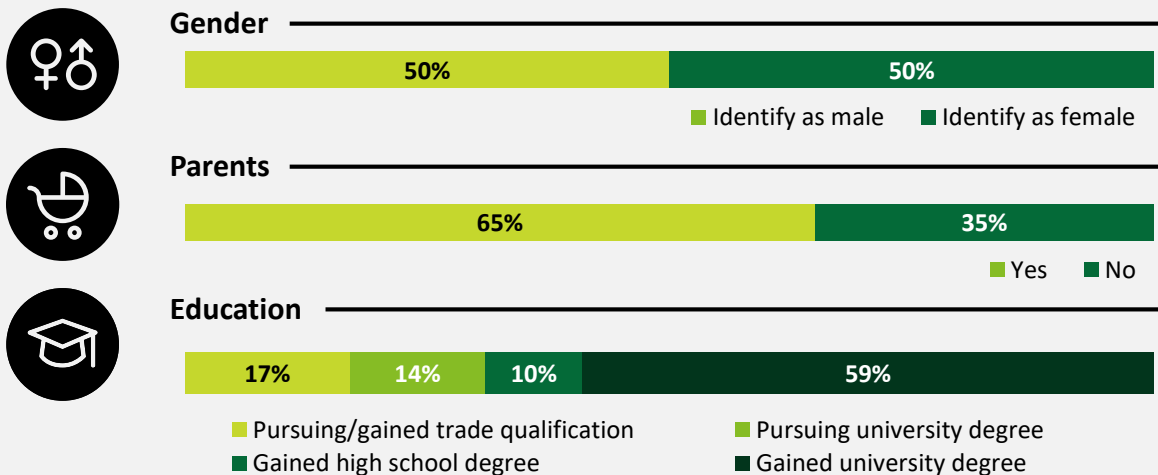
Views on business' social impact continues to decline; job loyalty slips. Continuing a steady decline over the last five years, less than half of millennials (47%) and Gen Zs (48%) think business is having a positive impact on society. This marks the first time these levels have fallen below 50% since 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 **South Africa's millennials and Gen Zs** stand out from their global counterparts on these key themes.

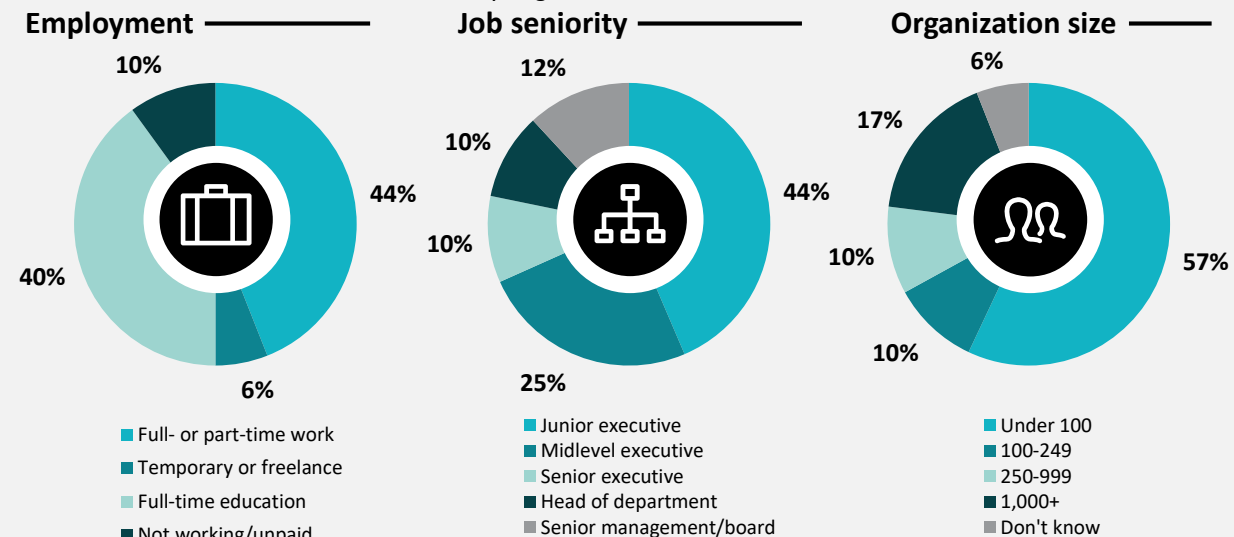
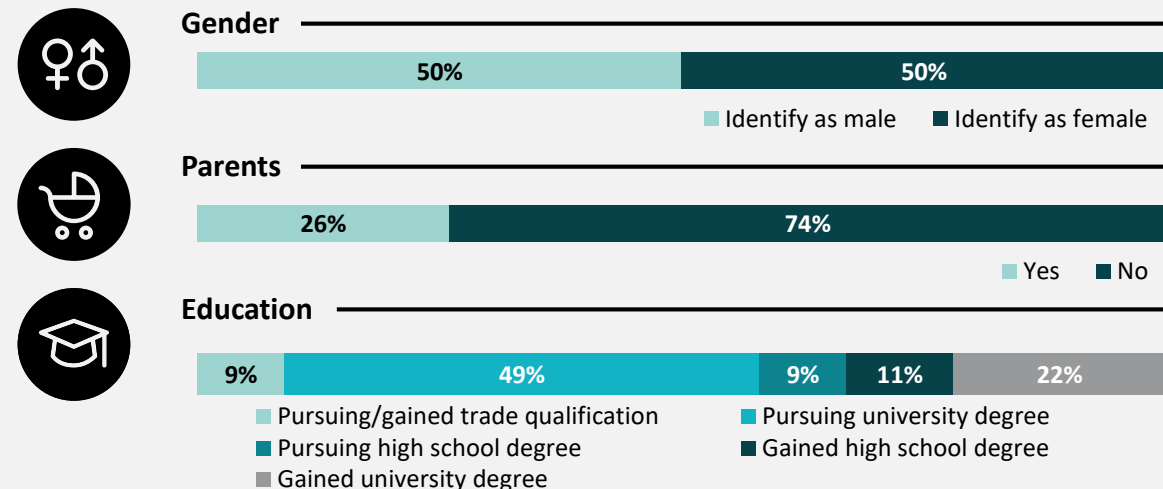
2021 MILLENNIAL SURVEY
Country profile: South Africa

499 total respondents in South Africa
299 millennials and 200 Gen Zs

MILLENNIAL PROFILE

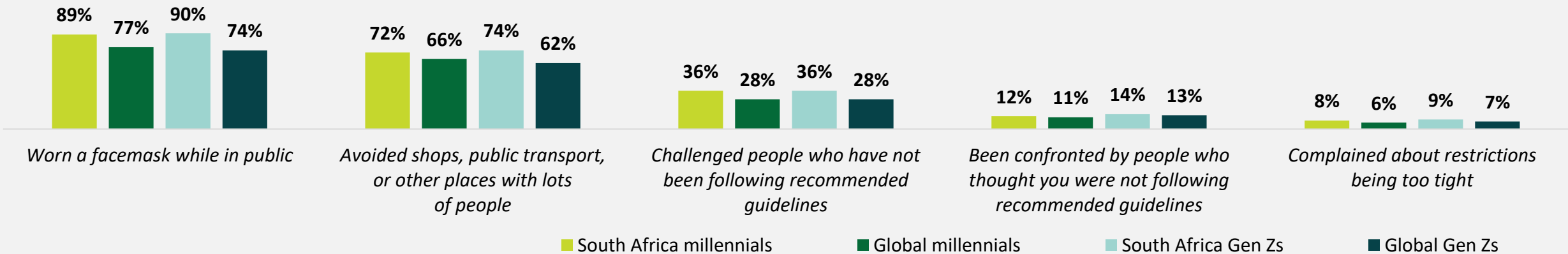


GEN Z PROFILE

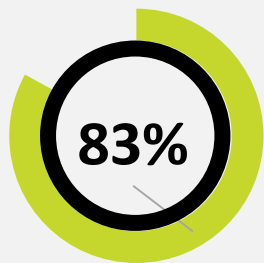


The pandemic: Adherence to COVID-19 guidelines

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

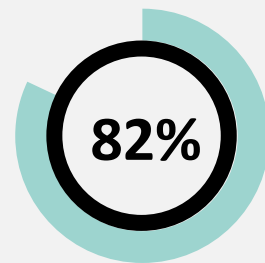


In your day-to-day life, how seriously do you follow your **government's public health guidelines** around the COVID-19 pandemic?*



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

vs.
74%
globally



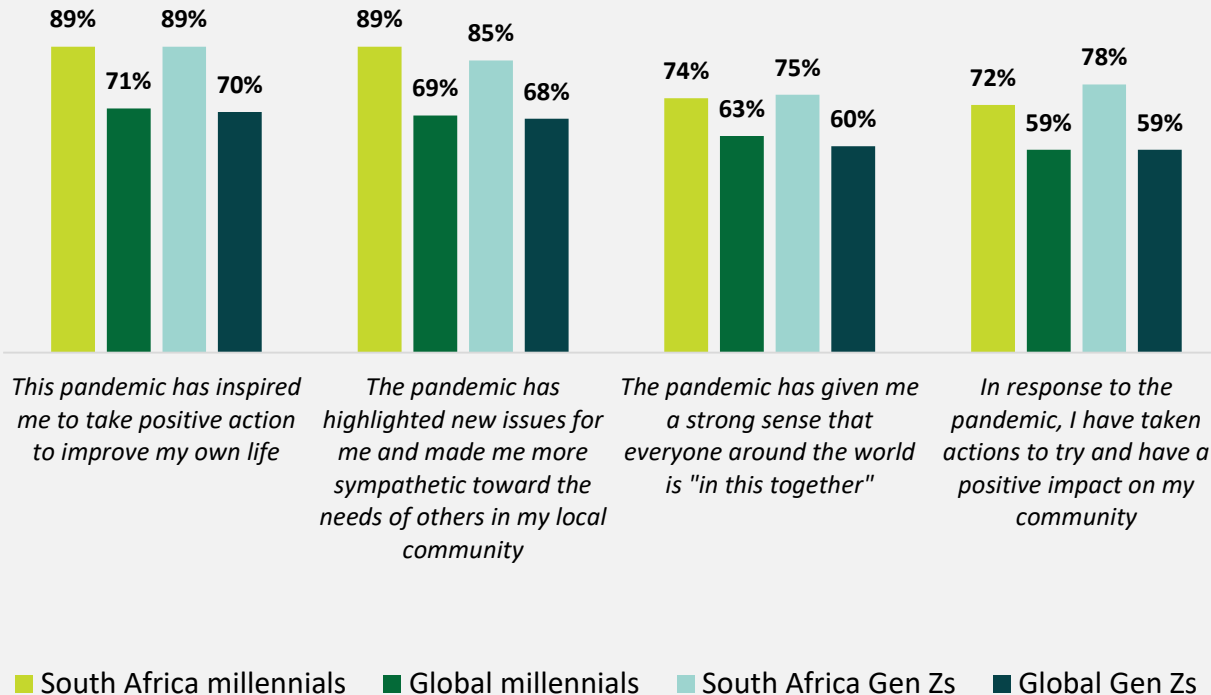
of Gen Zs in South Africa said that they had "very" or "fairly" seriously **followed their government's public health guidelines** around the COVID-19 pandemic

vs.
69%
globally

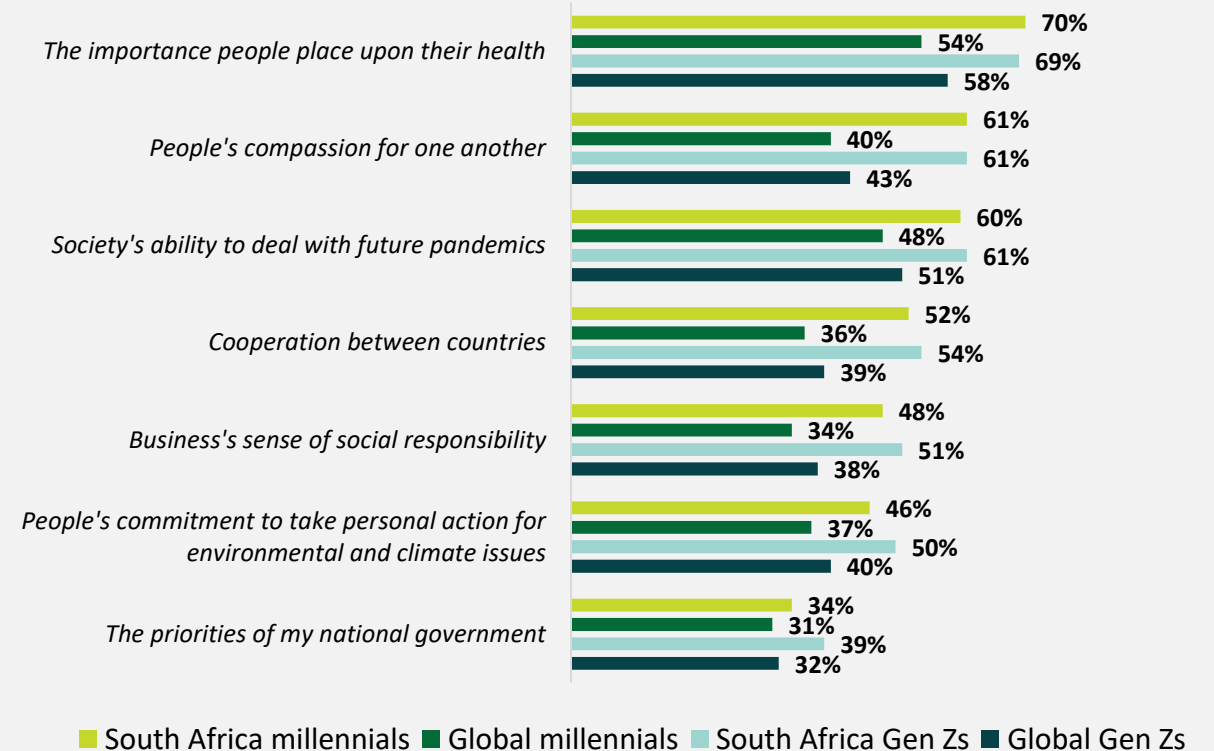
*Not asked in China

The pandemic: Reflecting on society and the future

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

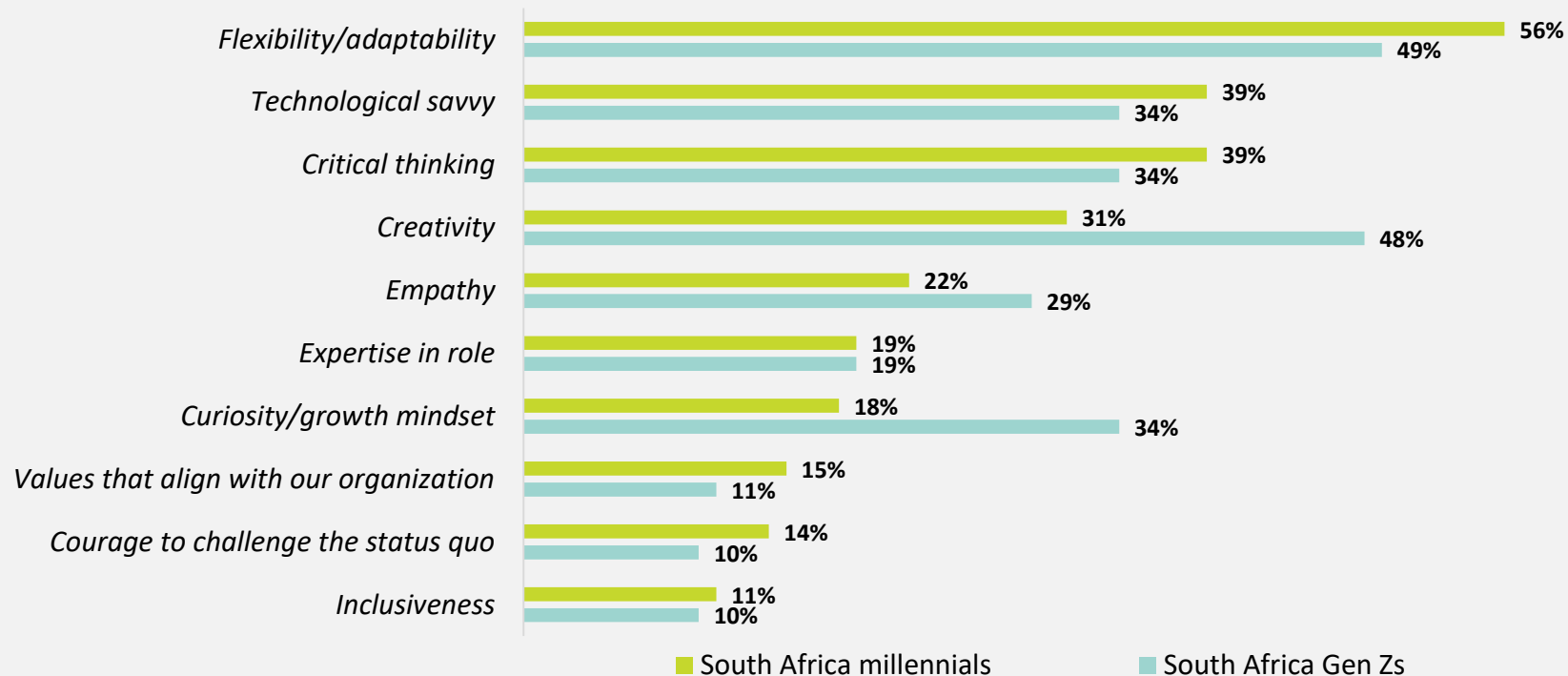


Percent of respondents who think the following will have changed for the better when the pandemic is finally over:

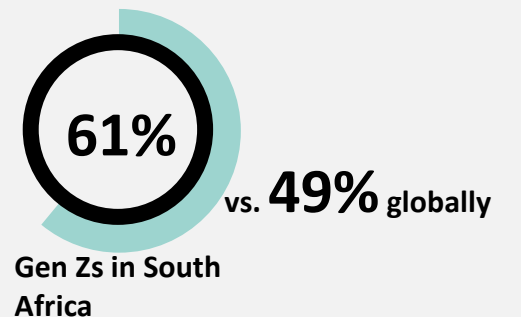
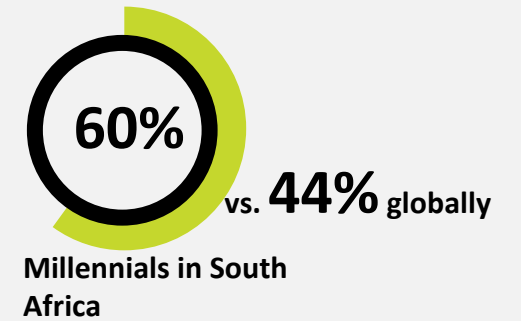


The future of work: Flexibility is key, but ethics are unbending

Employee characteristics most critical to success of organization*:



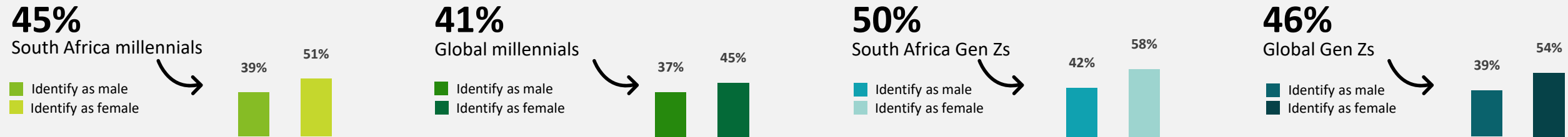
Those who have made choices over the types of work they'd do and the organizations they're willing to work for based on their personal beliefs/ethics over the past two years:



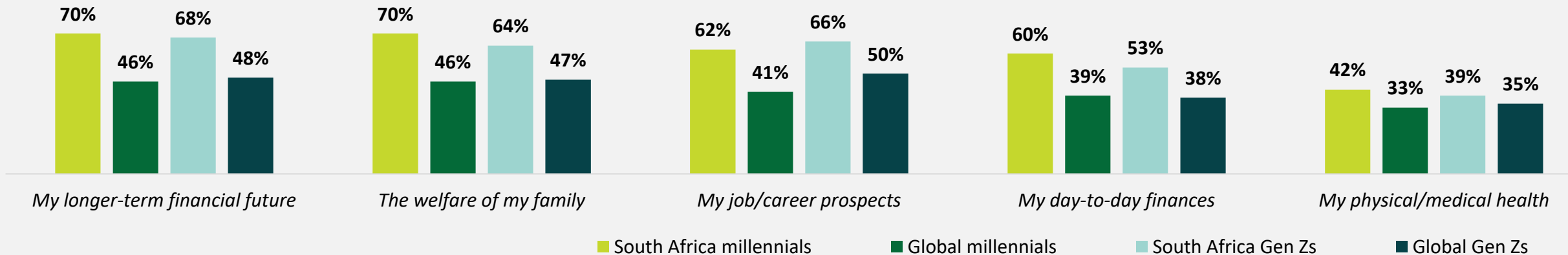
*Asked only of those in full-time, part-time or temporary employment

Mental health: Levels and sources of stress

Percent of respondents who say **they feel anxious or stressed all or most of the time:**



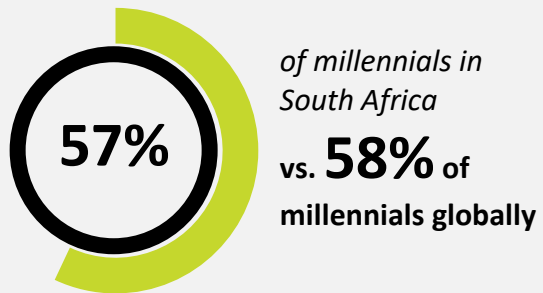
Percent of respondents who say the following **contribute a lot to their feelings of anxiety or stress***:



*Asked only of those who feel anxious or stressed

Mental health: Stress in the workplace

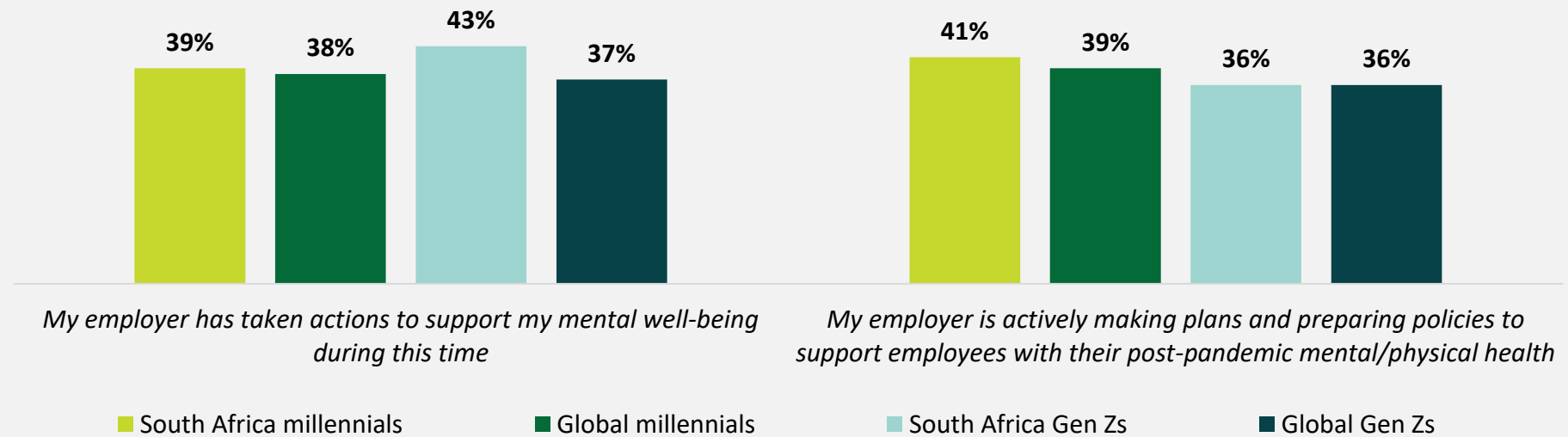
Percent of respondents who say they **HAVE NOT spoken openly to their employers** about feeling more stressed/anxious since the pandemic started*:



*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.

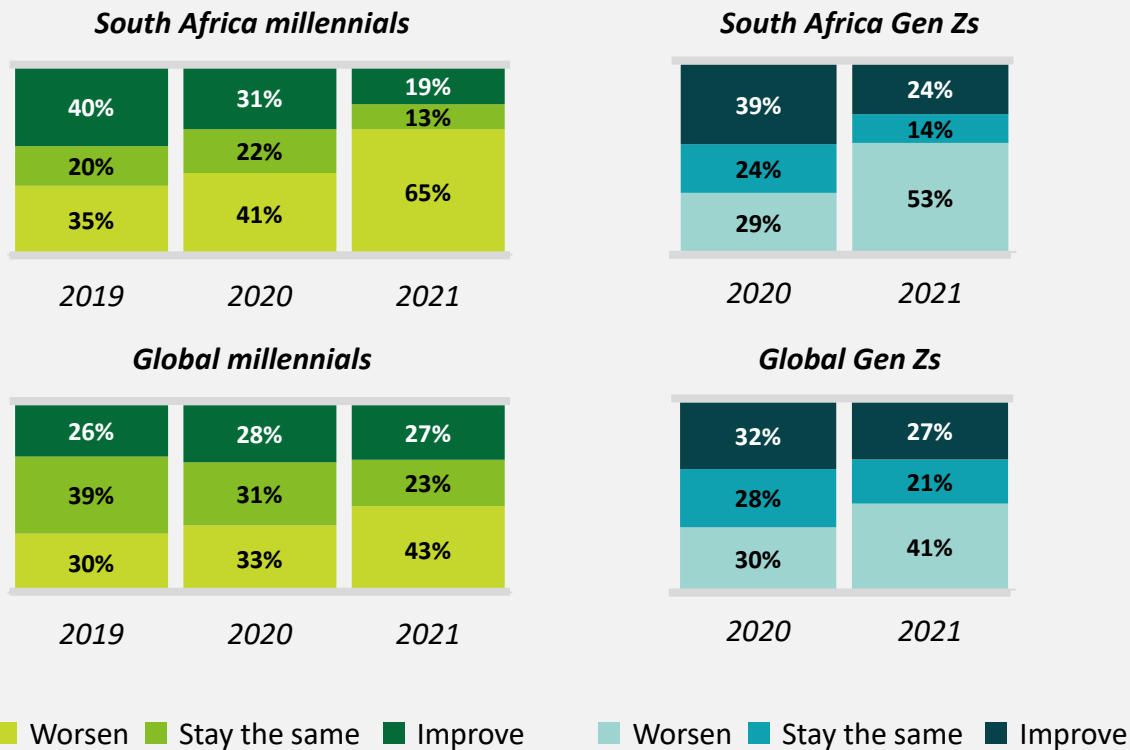
Percent of respondents who **strongly disagree/tend to disagree** with the following statements when thinking specifically about their current employer's response to COVID-19*:



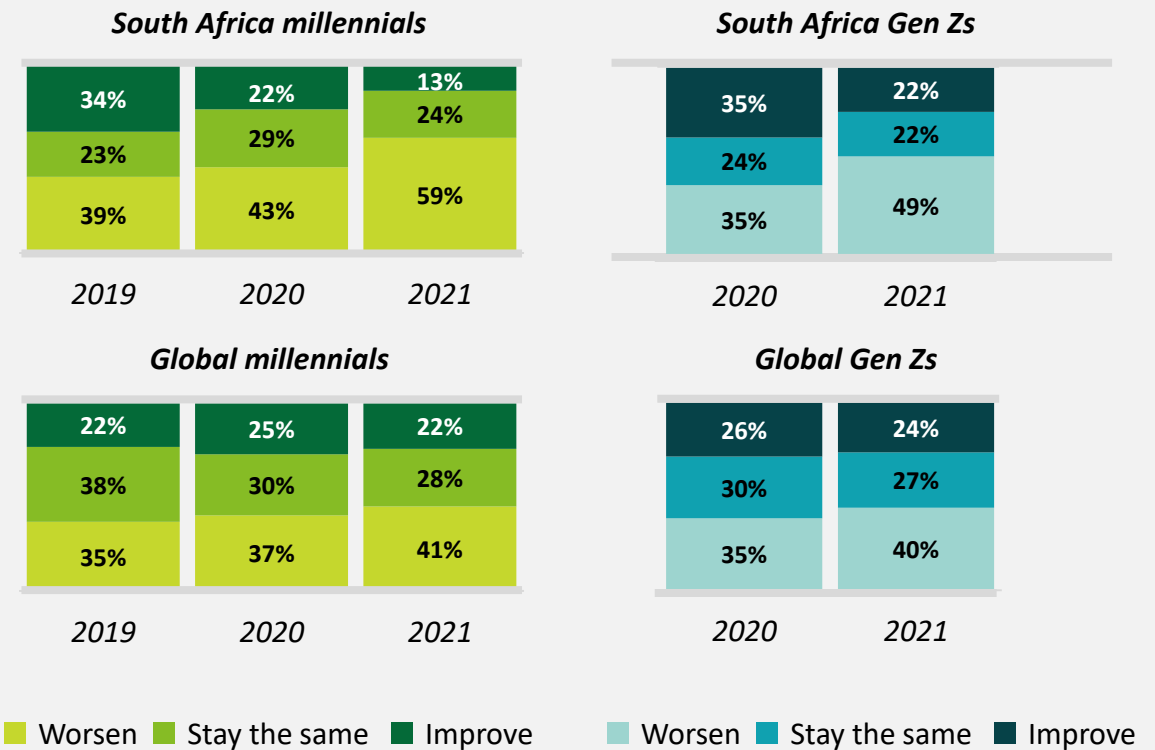
*Asked only of those in full-time, part-time or temporary employment

Economic and political outlook

How do you expect the **overall economic situation** in your country will change over the next 12 months?



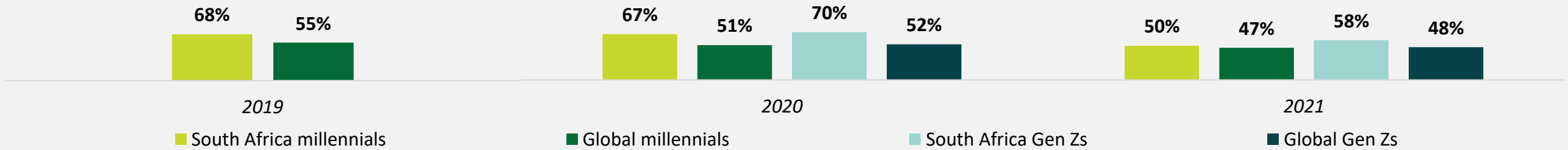
How do you expect the **overall sociopolitical situation** in your country will change over the next 12 months?*



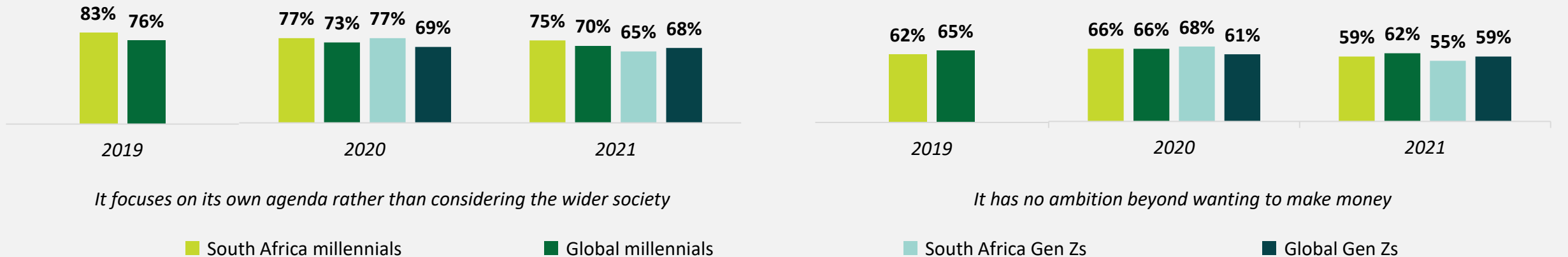
*Not asked in China

View of business

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:



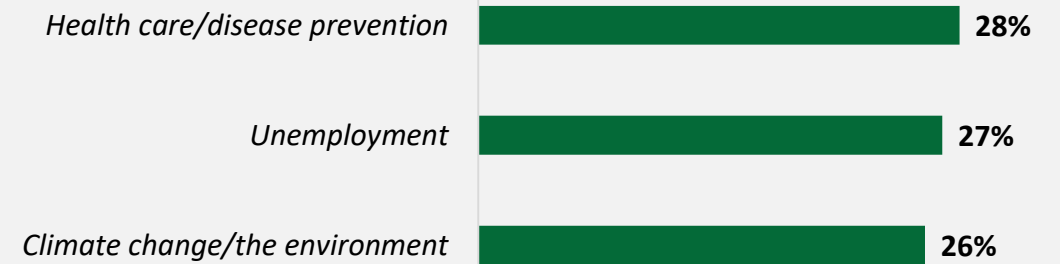
Concerns: World challenges

Top three issues of greatest concern:

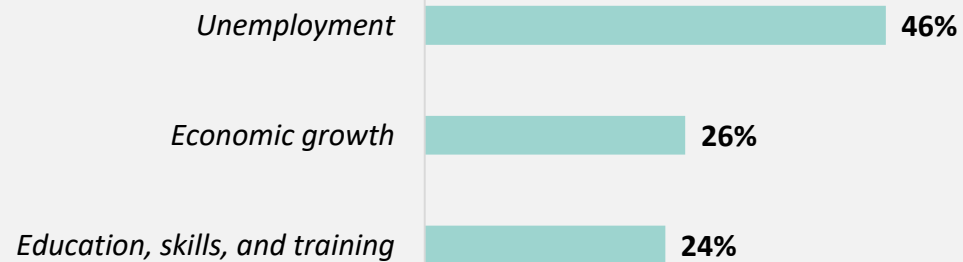
South Africa millennials



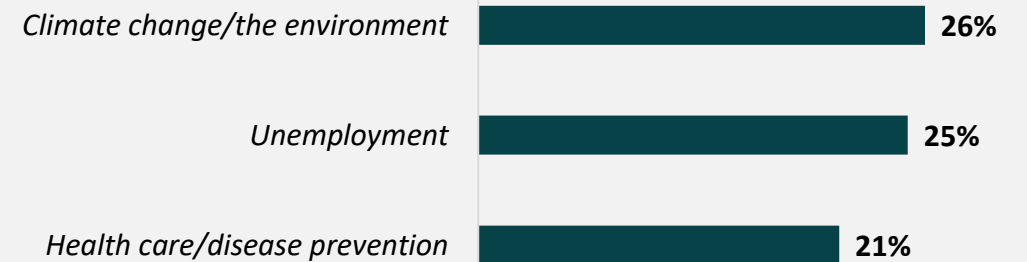
Global millennials



South Africa Gen Zs

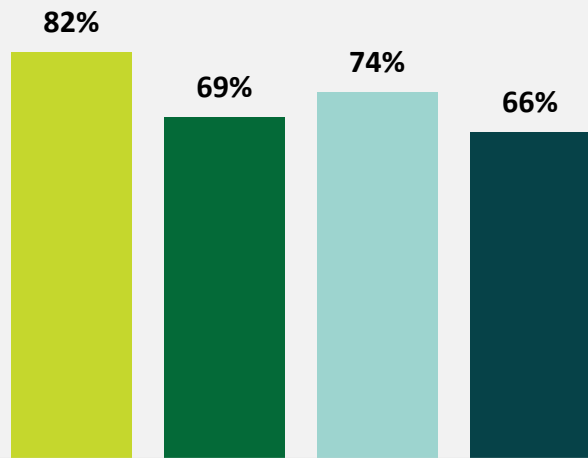


Global Gen Zs



Concerns: Wealth and income inequality

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



■ South Africa millennials ■ Global millennials
■ South Africa Gen Zs ■ Global Gen Zs

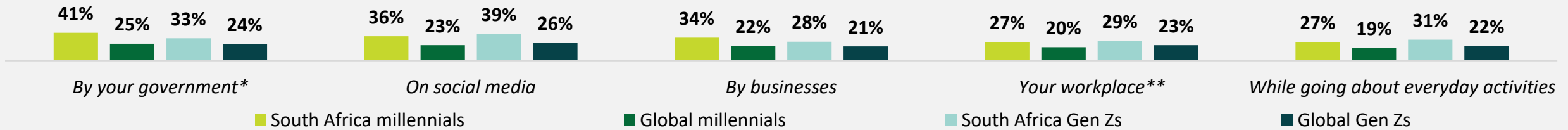
Which are the top factors behind income inequality? *Global top three*



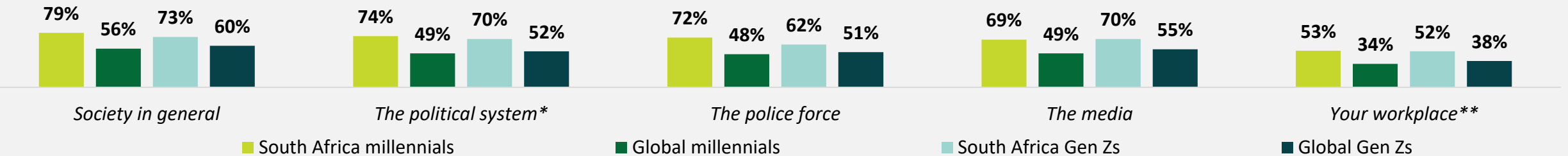
■ South Africa millennials ■ Global millennials ■ South Africa Gen Zs ■ Global Gen Zs

Concerns: Discrimination

Percent of respondents who feel personally discriminated against all the time or frequently because of an aspect of their backgrounds:



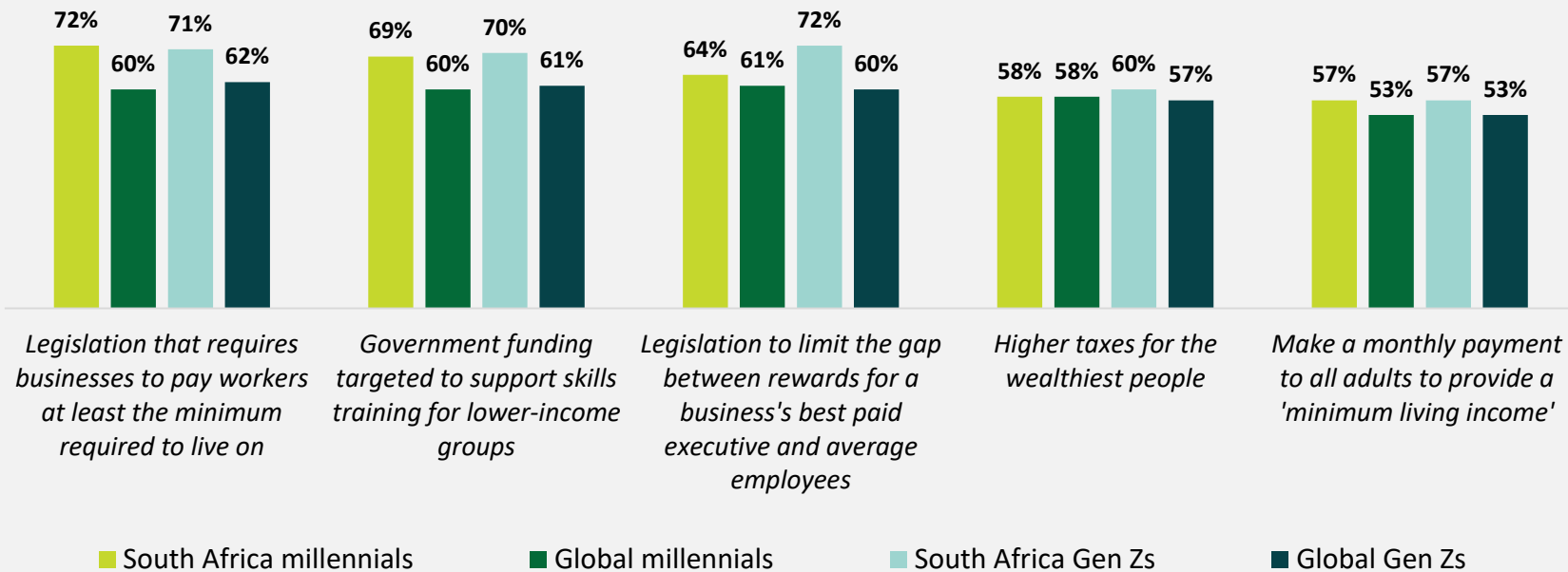
Percent of respondents who believe systemic racism is very or fairly widespread within the following institutions:



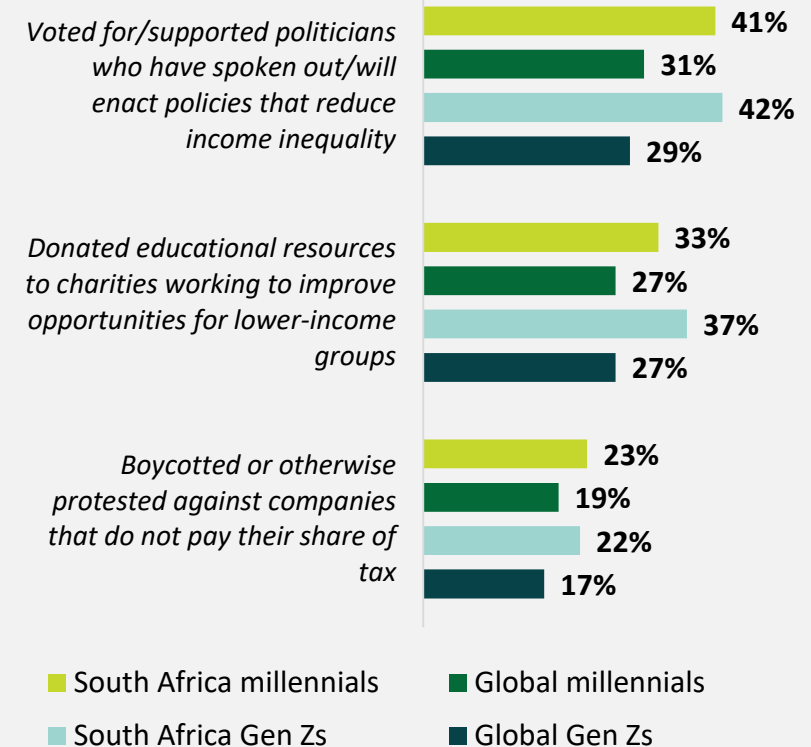
*Not asked in China. **Only asked of those in full-time, part-time or temporary employment.

Time to act: Wealth and income inequality

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

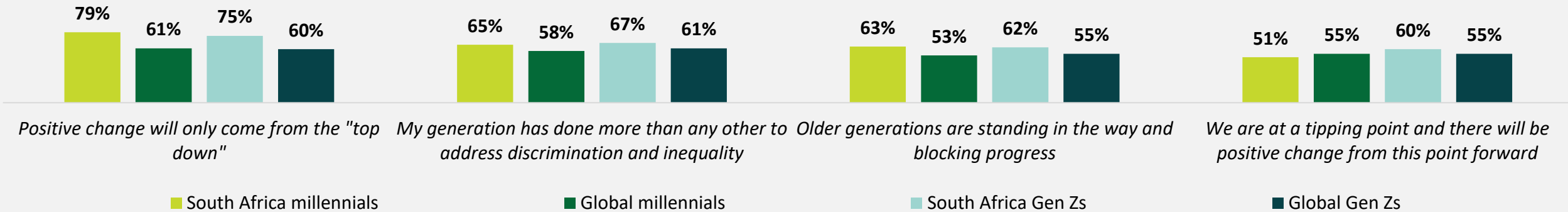


Which of these actions have you taken to help reduce income inequality in your country?

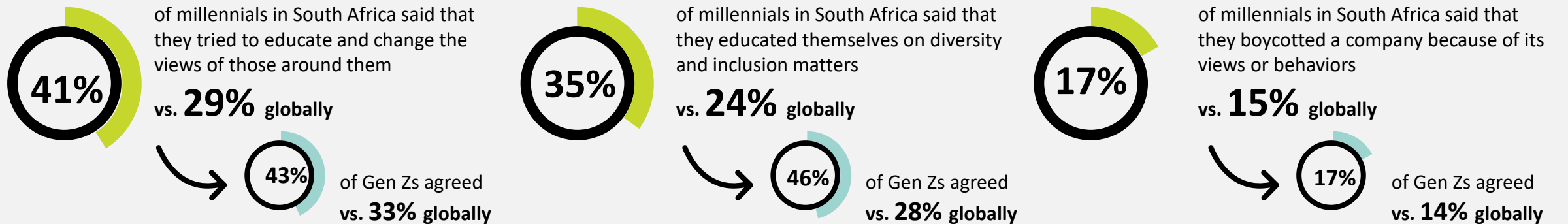


Time to act: Discrimination

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

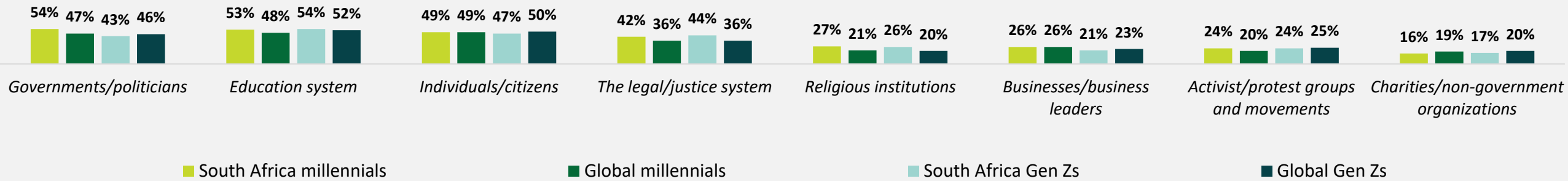


What actions have you taken to try to tackle discrimination?

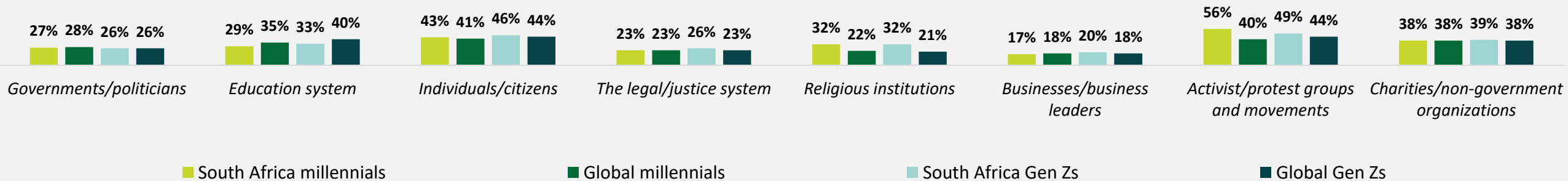


Time to act: Who is making a difference when it comes to fighting systemic racism?

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?*

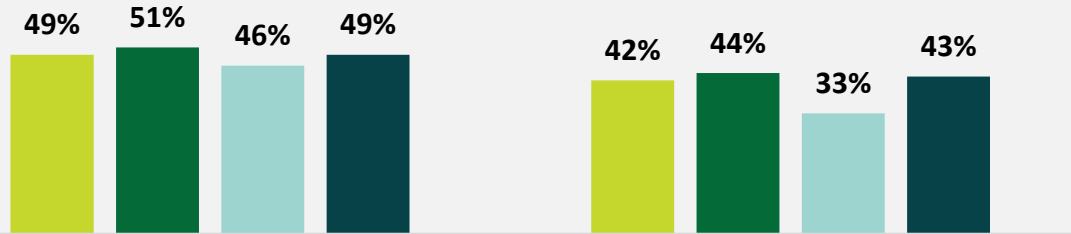


*Up to three options selected at both questions.

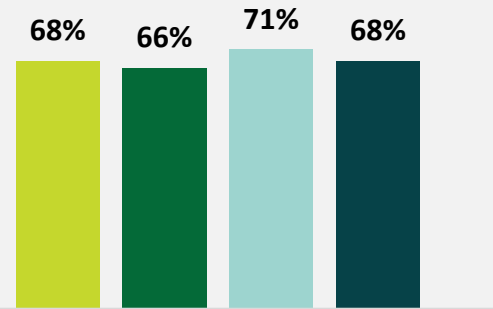
Time to act: The environment

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



■ South Africa millennials

■ Global millennials

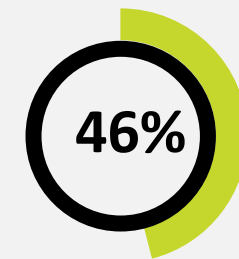
■ South Africa Gen Zs

■ Global Gen Zs

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

MILLENNIALS

South Africa



vs.
37% globally

GEN ZS

South Africa



vs.
40% globally

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.

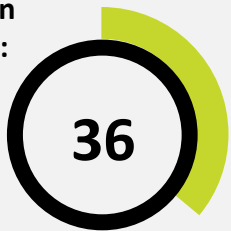
Scores are based on results from the following five questions and are aggregated to create a measure between zero and a hundred. This scale gives us the ability to compare not only year-to-year movement, but also regional and demographic groups within a given year.



MILLENNIALS:

Millennials in South Africa:

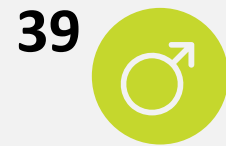
↓ -11 pts.



Identify as female:

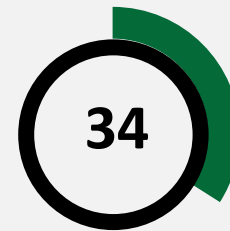


Identify as male:



Millennials globally:

↓ -3 pts.



Identify as female:



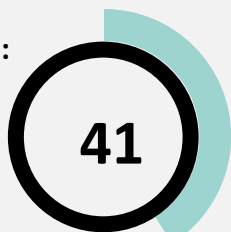
Identify as male:



GEN ZS:

Gen Zs in South Africa:

↓ -10 pts.



Identify as female:

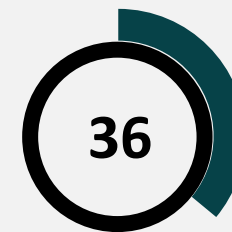


Identify as male:



Gen Zs globally:

↓ -3 pts.



Identify as female:



Identify as male:





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