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The 2020 Deloitte Millennial Survey
South Africa

Global Summary

2020 Deloitte Millennial Survey

Our methodology:

In late 2019, for its ninth annual Millennial Survey, Deloitte Global surveyed **18.4k** millennial and Gen Z respondents across 43 countries, **including 509 respondents from South Africa**, to understand their views on a variety of topics—from their actions to make a positive impact in the world; to what they are looking for in jobs and employers; to the role of business in society; to the issues of mental health and stress; and more.

In early 2020, as the COVID-19 pandemic continued to unfold around the world, Deloitte fielded an additional survey of **9,100 respondents across 13 countries** to supplement the original survey findings with insights about:

- How millennials and Gen Zs are responding to the pandemic;
- How it is impacting them, their jobs/workplaces, and their views on businesses and governments; and
- The long-term implications the pandemic may have.

Key findings:

The unfolding of the COVID-19 pandemic and the preventive measures undertaken to slow its spread have impacted the attitudes of millennials and Gen Zs. The pulse survey conducted in Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, South Korea, Spain, the UK and the US during the pandemic uncovered the following global insights:



Mental health: Before the pandemic, close to half of the respondents said they were stressed all or most of the time. But anxiety levels fell eight points for both generations in the peak-pandemic pulse survey, indicating a potential silver lining to the disruption caused by the pandemic.



Environment: Prior to the pandemic, half of respondents said they believed it was too late to repair the damage caused by climate change. Yet, this figure dropped in the pulse survey, suggesting the environmental improvements resulting from reduced human activity during the pandemic has given hope there is still time to take action.



Finances: Many are financially prudent and literate, but three-fourths often worry about their financial situations either in the short or long term.



Work and loyalty: Before the pandemic, more millennials said they'd like to stay with their employers for at least five years than would prefer to leave within two, signaling employers may be better addressing their needs. It remains to be seen how loyalty will be affected by the pandemic.



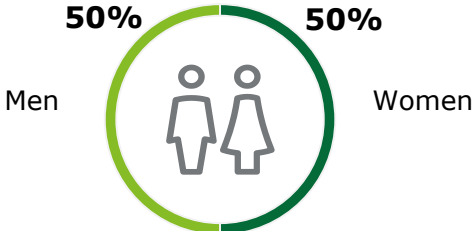
View of institutions: A majority of respondents gave businesses and governments high marks for their pandemic responses. Actions taken during the crisis, however, did not translate into overall better opinions of these institutions or their leaders.

We can understand the shifts in Millennial and Gen Z mindset during COVID-19 from a global perspective through the lens of these 13 countries, and how their attitudes evolved throughout the crisis.

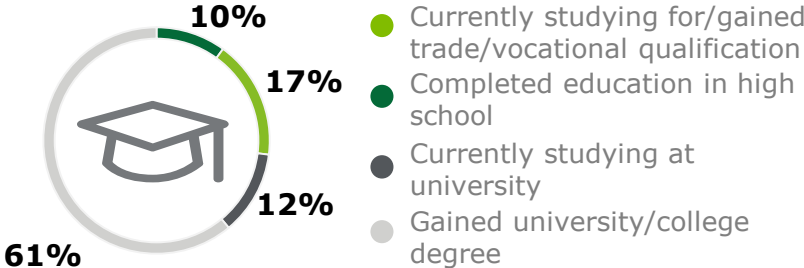
Sample profile (weighted)

304 Millennial interviews conducted in South Africa

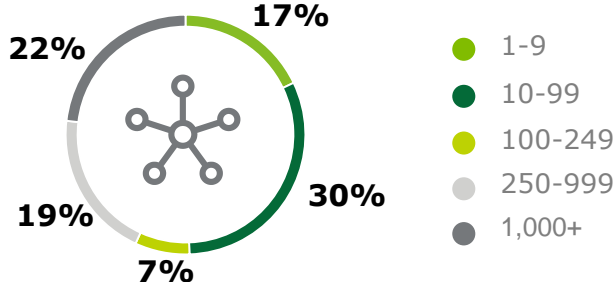
Gender



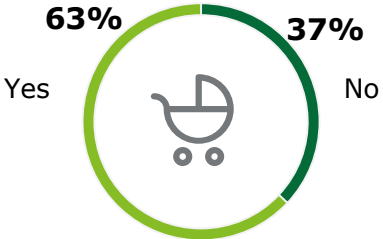
Education level



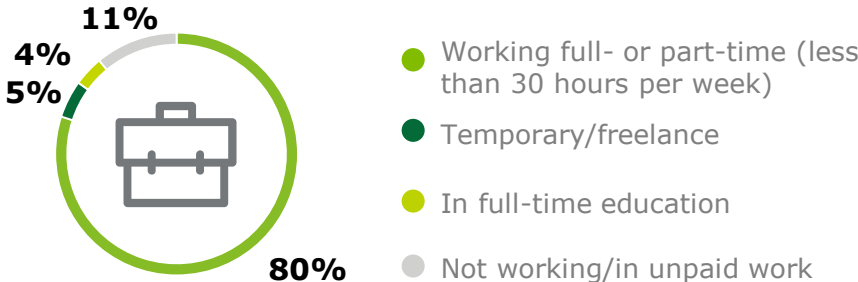
Organization size* (number of employees)



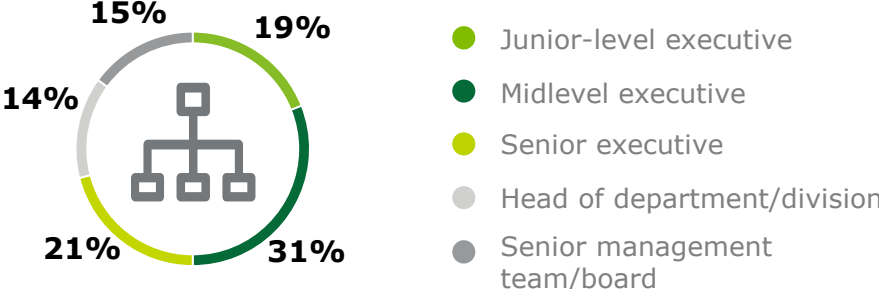
Have children



Working status



Job seniority/level*

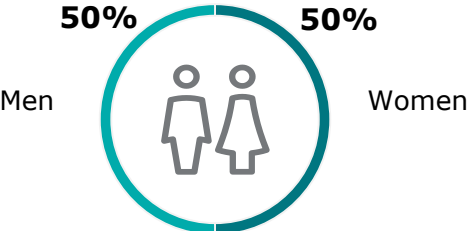


* Based upon those currently working

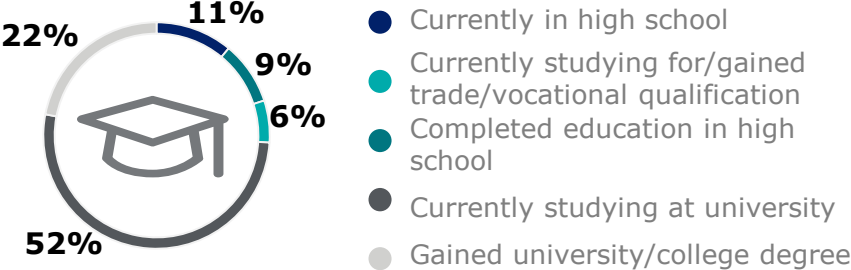
Sample profile (weighted)

205 Gen Z interviews conducted in South Africa

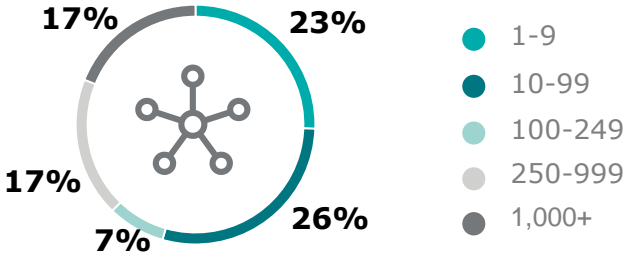
Gender



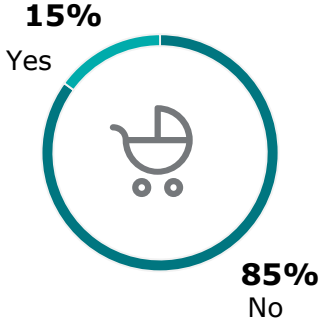
Education level



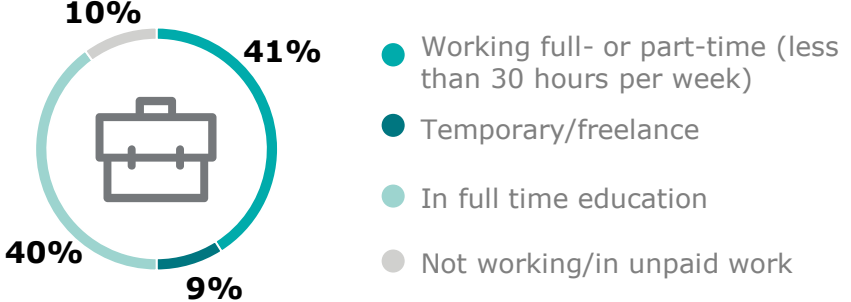
Organization size* (number of employees)



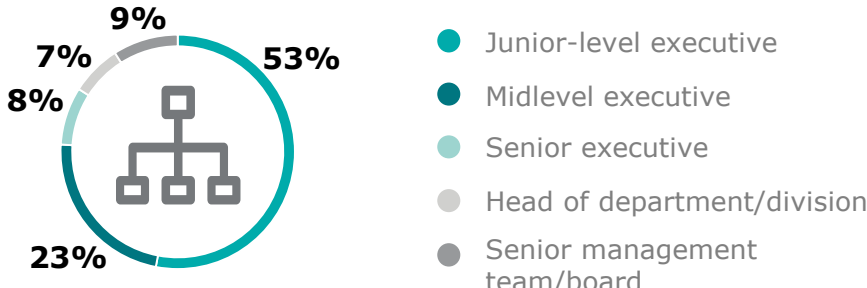
Have children



Working status



Job seniority/level*

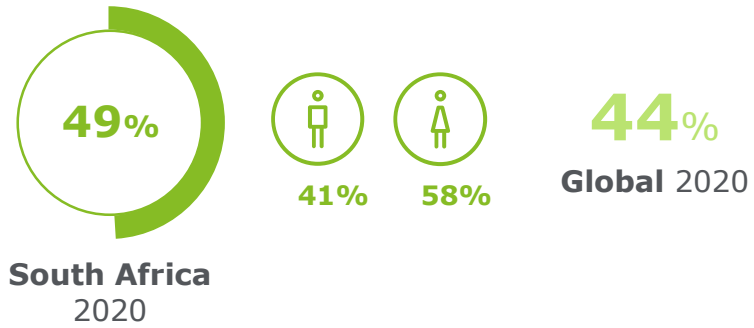


* Based upon those currently working



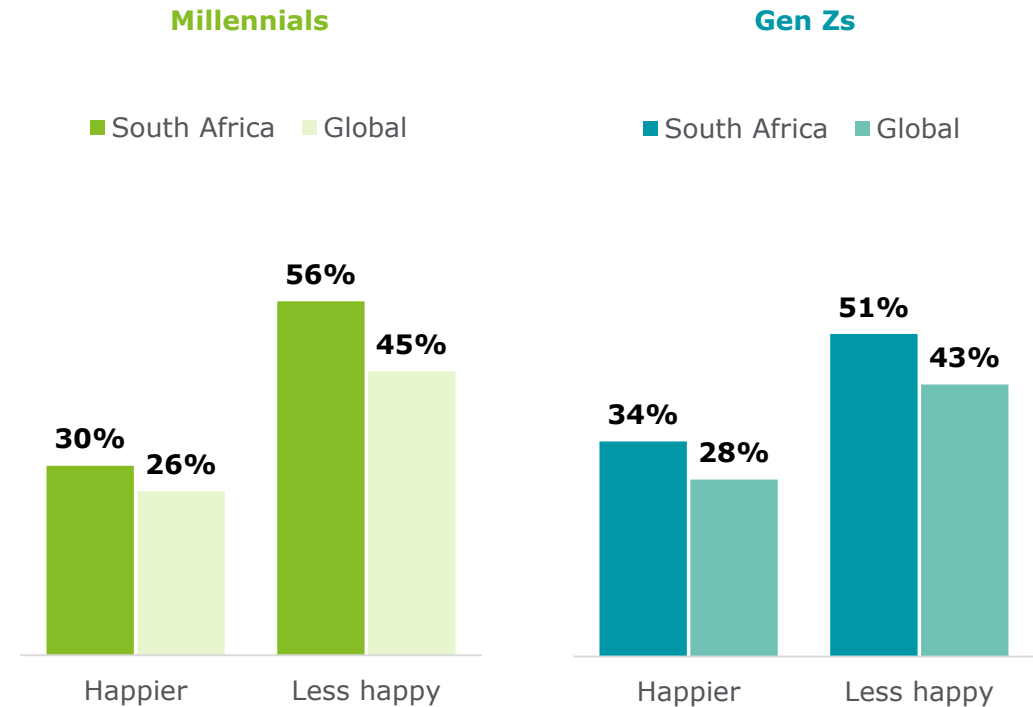
Stress and unhappiness

% **Millennials** and **Gen Zs** who agree they feel anxious or stressed all or most of the time



Q43) How often would you say you feel anxious or stressed?

% **Millennials** and **Gen Zs** who think they will be happier or less happy than their parents' generation

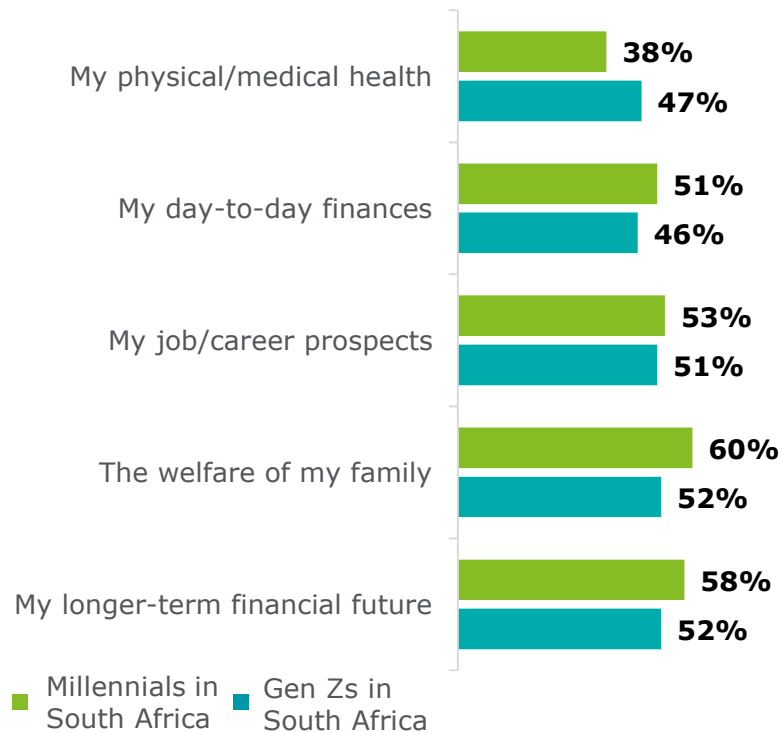


Q11B) Compared to your parents' generation, do you think that your generation will generally be ... happier, less happy, or no different?



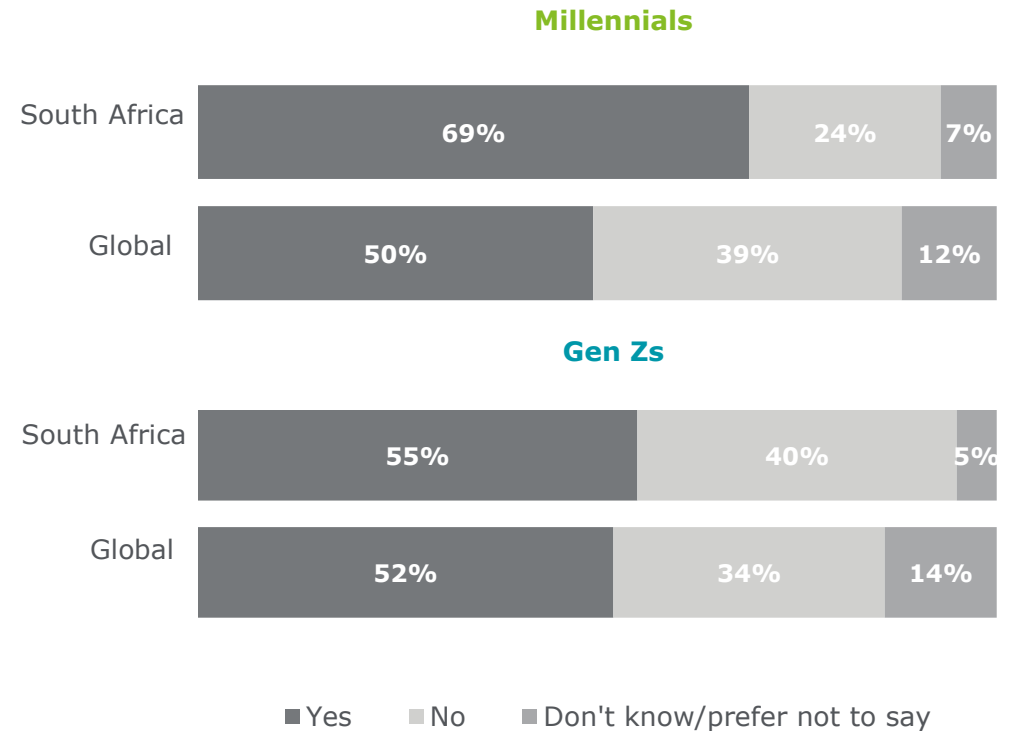
Stress and unhappiness

% **Millennials** and **Gen Zs** who are regularly stressed say ... contribute a lot to their feelings of stress



Q44) To what extent do each of the following contribute to your feelings of anxiety or stress?

% **Millennials** and **Gen Zs** who agree that stress is a legitimate reason to take time off work



Q45) Do you believe feelings of anxiety or stress are a legitimate reason to take time off from work? (i.e. as a sick day/leave of absence)



Stress and unhappiness

% **Millennials** and **Gen Zs** who ...

Have taken time off work in the past 12 months due to anxiety or stress

40%
South Africa

29%
Globally

40%
South Africa

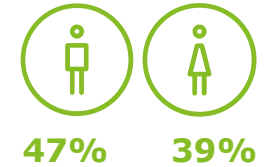
34%
Globally



Of those who have taken time off for stress, percent who told their employers that their absence was due to anxiety or stress

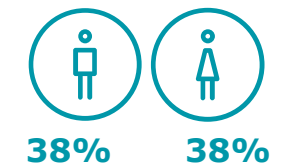
37%
South Africa

44%
Globally



29%
South Africa

38%
Globally



Q46) In the past 12 months, have you ever taken time off work (i.e. a sick day/leave of absence) due to feelings of anxiety or stress? (regardless of whether anxiety or stress was the reason you gave to your employer at the time)

Q47) When you took time off work due to feelings of anxiety or stress, did you tell your employer this was the reason? Or did you say it was because of a different reason? **Among those who have taken time off due to anxiety or stress in the past 12 months

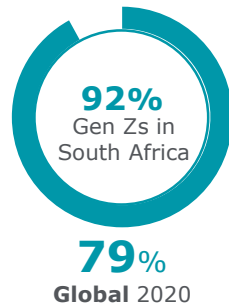


Environmental concerns and behavior

% Millennials and Gen Zs who “strongly agree” or “tend to agree” that ...

We have already hit the point of no return and it is too late to repair the damage

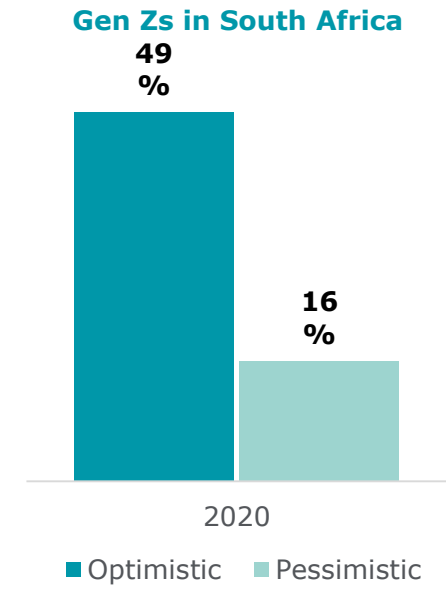
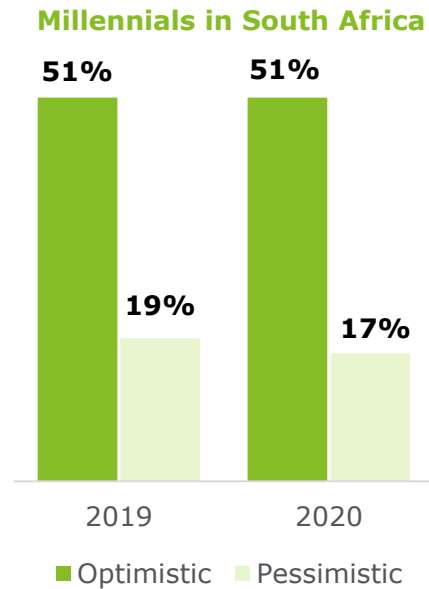
Climate change is most certainly occurring and is primarily caused by human activity



Q21) To what extent do you agree or disagree 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

Q21) To what extent do you agree or disagree with the following statements related to the environment? - Climate change (global warming, major changes in weather patterns, etc.) is most certainly occurring and is primarily caused by human activity

% Millennials and Gen Zs who are optimistic/pessimistic that efforts to protect/sustain the health of the planet will be effective



Global 2020 40% 29%

Global 2020 40% 27%

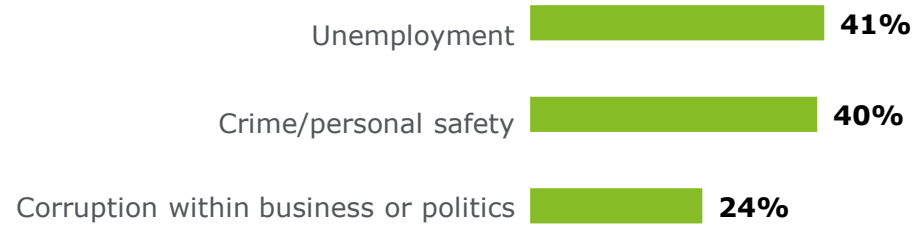
Q6) Are you generally optimistic or pessimistic that efforts to protect and sustain the health of the planet will be effective?



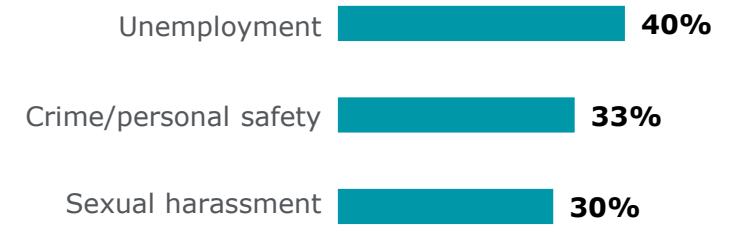
Environmental concerns and behavior

% **Millennials** and **Gen Zs** are concerned about ...

South Africa's Millennials – Top 3



South Africa's Gen Z - Top 3



Global Millennials – Top 3

1. Climate change / protecting the environment
2. Crime / personal safety
3. Unemployment

Global Gen Z - Top 3

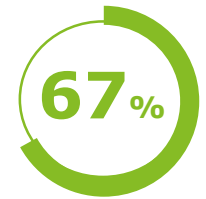
1. Climate change / protecting the environment
2. Unemployment
3. Sexual harassment

Q1b) Which three of these issues are of greatest concern to you?

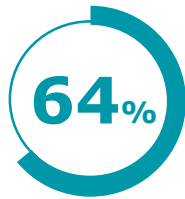


Financial concerns and behavior

% **Millennials** and **Gen Zs** who agree that their financial situations over the next 12 months will improve



Millennials in South Africa



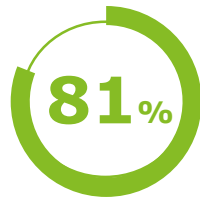
Gen Zs in South Africa

Global improve 2020

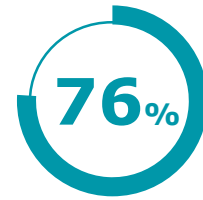
42%

45%

% **Millennials** and **Gen Zs** who often worry or get stressed* about their general financial situations



Millennials in South Africa



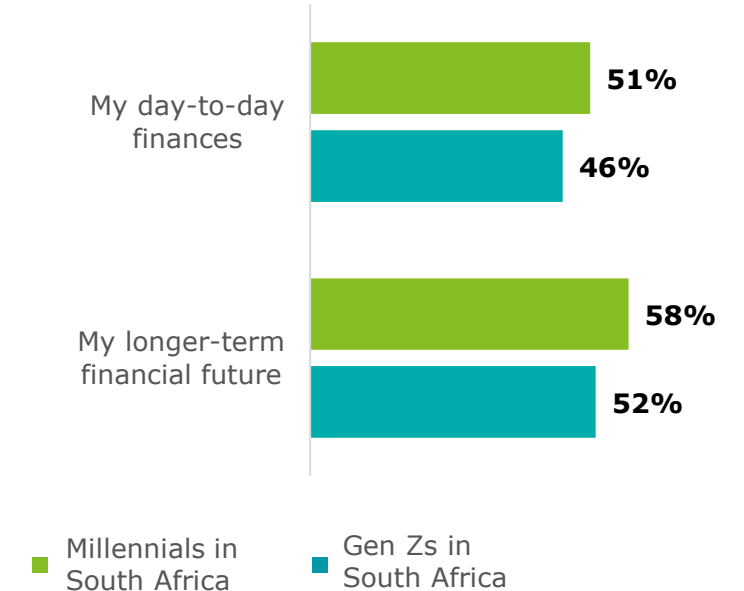
Gen Zs in South Africa

Global strongly agree/tend to agree 2020

67%

64%

% **Millennials** and **Gen Zs** who are regularly stressed say ... contribute a lot to their feelings of stress



Q4) How do you expect your personal financial situation to change over the next 12 months?

Q33) To what extent do you agree or disagree with the following statements? - I often worry/get stressed about my general financial situation *strongly agree or tend to agree

Q44) To what extent do each of the following contribute to your feelings of anxiety or stress?

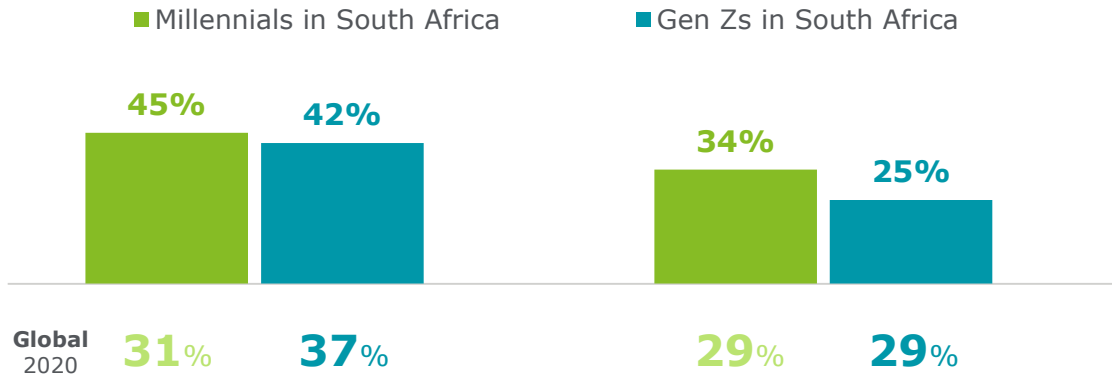


Financial concerns and behavior

% Millennials and Gen Zs who agree that ...

I couldn't cope financially if I unexpectedly received a large bill or had to fund a major expense

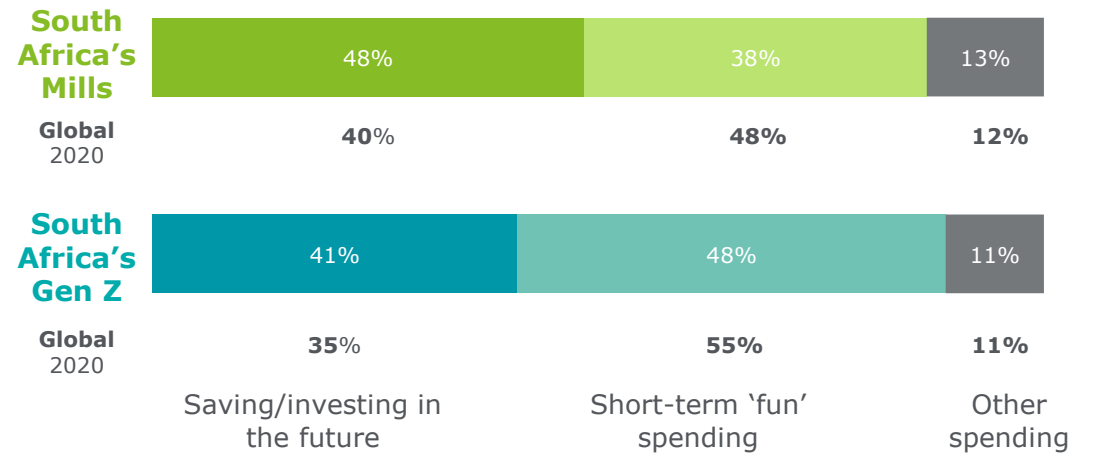
I have missed paying or haven't been able to pay a bill/fixed payment in the last six months



Q34) Please indicate whether the following statements are true or false... I could cope financially if I unexpectedly received a large bill or had to fund a major expense

Q34) Please indicate whether the following statements are true or false... I have missed paying or haven't been able to pay a bill/fixed payment in the last six months

% Millennials' and Gen Zs' distribution of "discretionary" spending



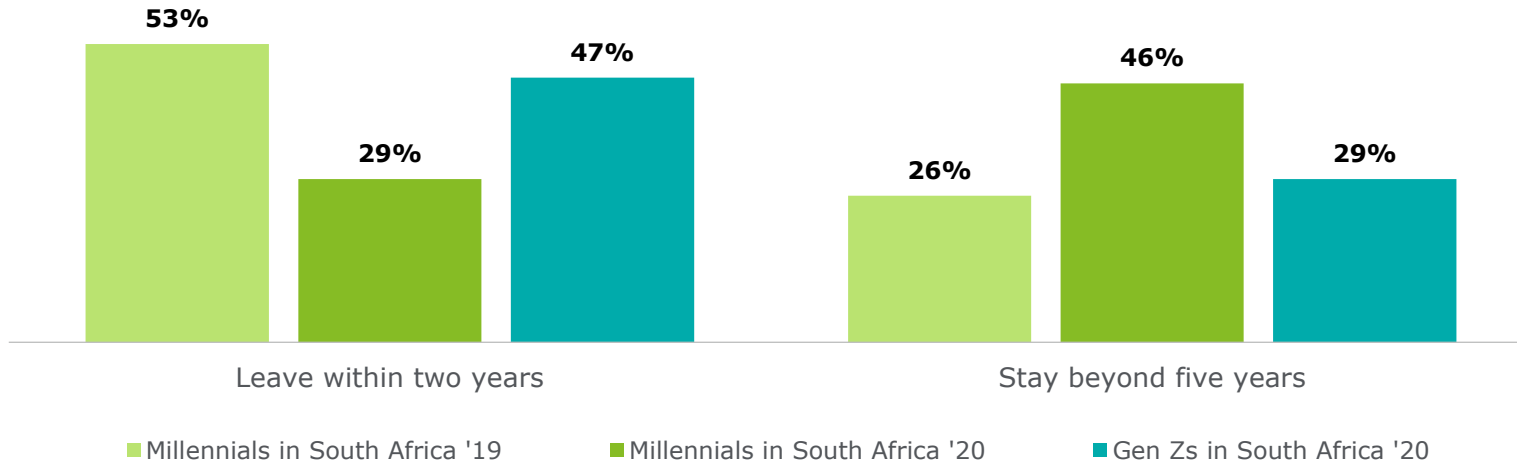
Q32) Once you've covered things you have to pay for (e.g. taxes, rent/mortgage, food, etc.), what proportion of the money you are left with do you typically devote to... Saving/investing in the future (general savings to put towards large future purchases, my pension/retirement funds, investments/financial portfolio, saving for my child's/children's education), short-term 'fun' spending (general spending/social life/entertainment, saving or spending on travel/holidays, charities/causes that are important to me), other spending (other spending not covered above). Rebased to exclude 'don't know'.



Job security and Industry 4.0

% **Millennials** and **Gen Zs** who expect to leave/stay with their current employers ...

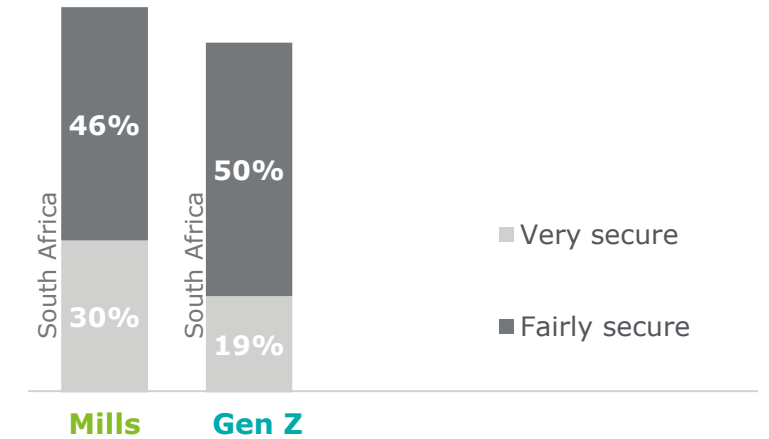
	Global 2020	
Leave within two years	31%	50%
Stay beyond five years	35%	21%



Q8) 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?

% **Millennials** and **Gen Zs** who feel very/fairly secure in their current roles

	Global 2020	
Very secure	23%	20%
Fairly secure	53%	49%

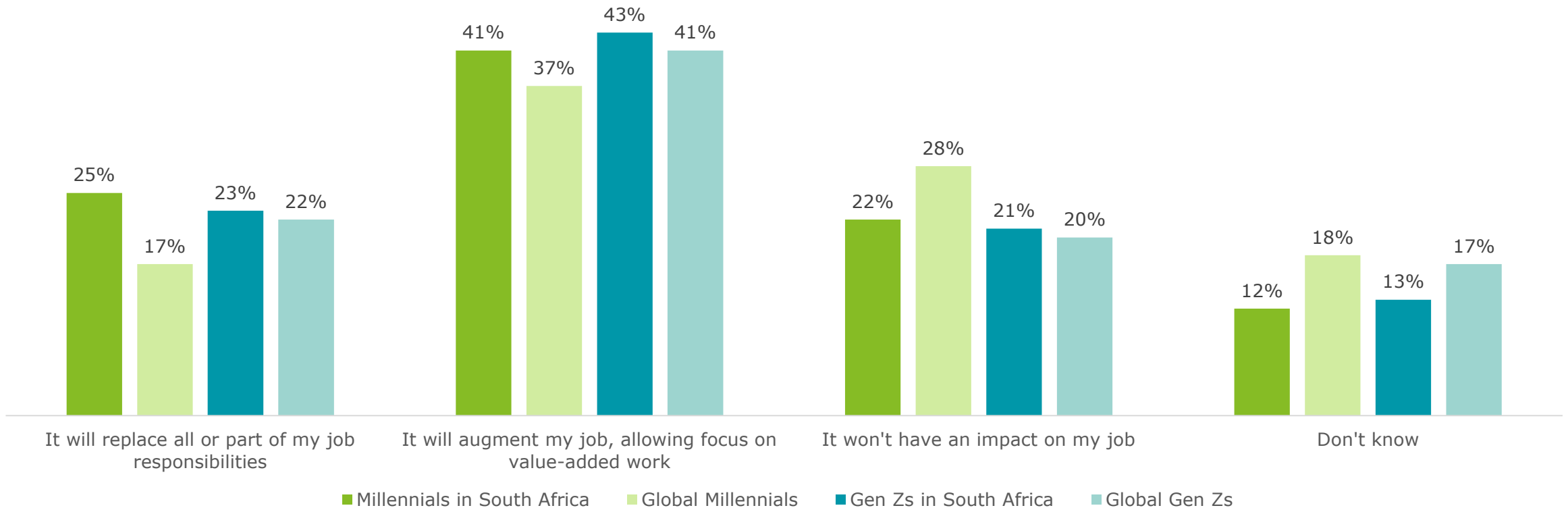


Q38) How secure do you feel in your current role where you work?



Job security and Industry 4.0

% **Millennials** and **Gen Zs** who expect Industry 4.0 will have the following impact on their current jobs

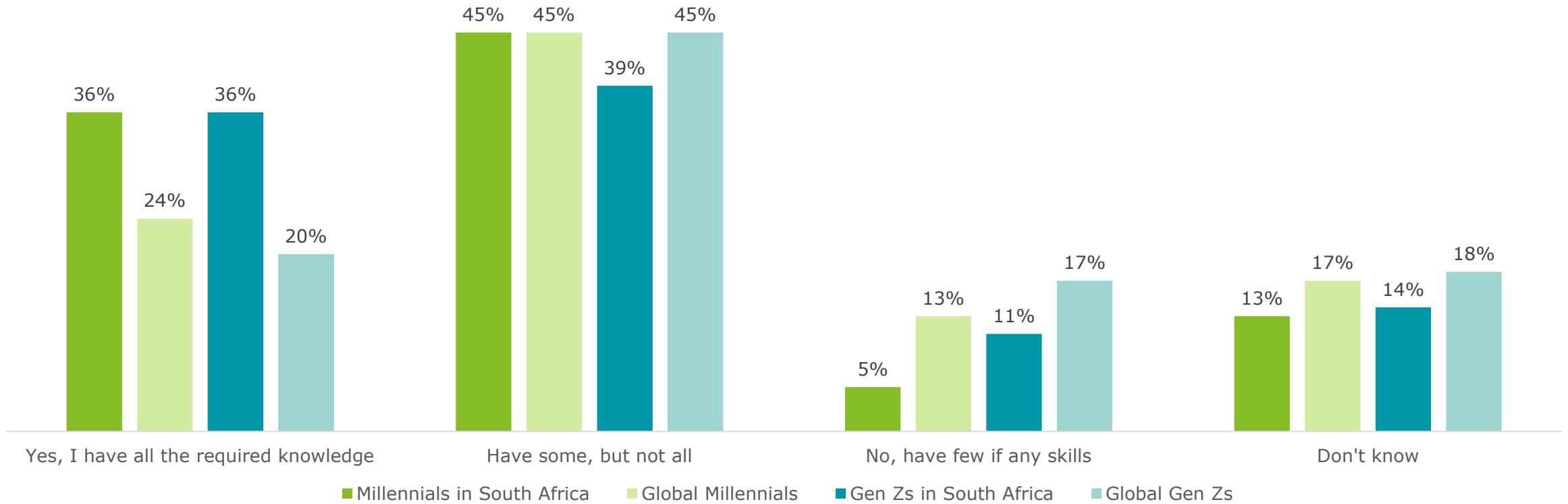


Q40) What impact, if any, do you think Industry 4.0 might have on your current job?



Job security and Industry 4.0

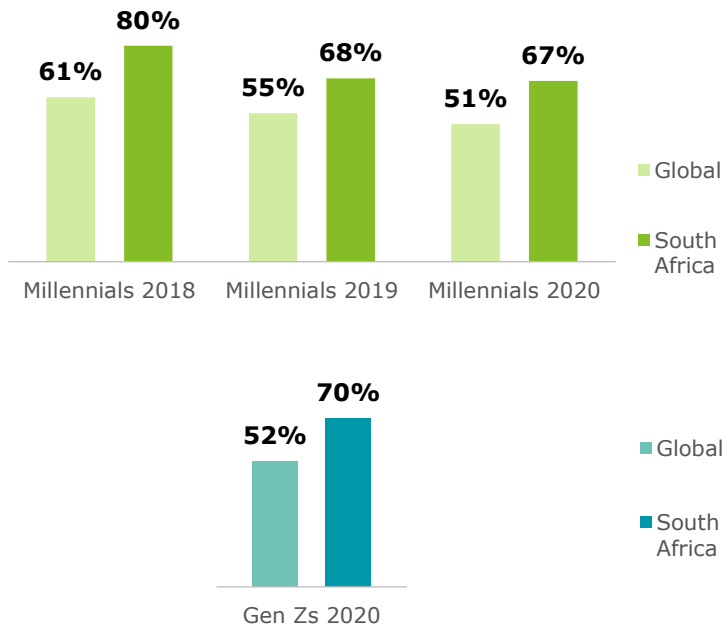
% **Millennials** and **Gen Zs** who say they have the skills and knowledge required as Industry 4.0 shapes the working environment



Q41) Do you feel you currently have the skills and knowledge that will be required as the working environment is increasingly shaped by Industry 4.0?

View of business

% **Millennials** and **Gen Zs** who say businesses in general have a very/fairly positive impact on the wider society in which they operate



Q12) Thinking about businesses in general around the world, what impact do you think they are having on the wider society in which they operate?

% **Millennials** and **Gen Zs** who have stopped or started a relationship with a business because of ...

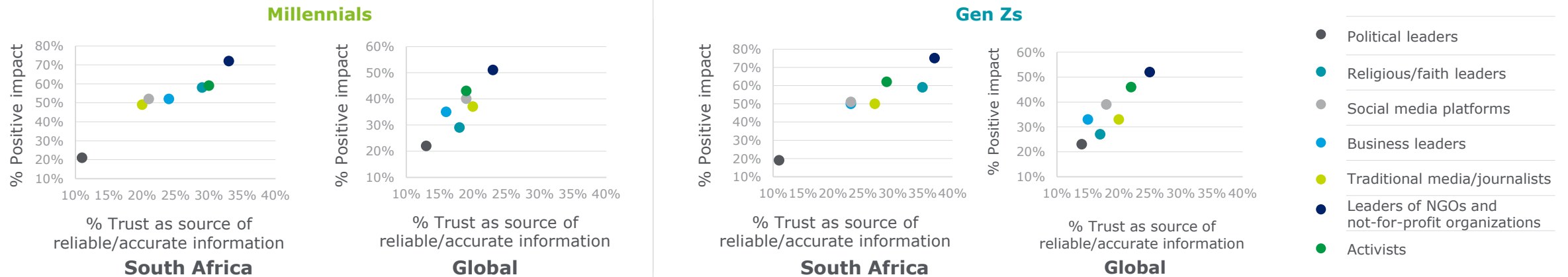
	South Africa's Millennials % who have ...		South Africa's Gen Zs % who have ...	
	Stopped	Started	Stopped	Started
Balance achieved between "doing good" and making profits	18%	43%	19%	32%
Positive or negative impact of products/services on the environment	36%	44%	39%	49%
Its ability to protect personal data	26%	34%	31%	36%
Its position/performance on diversity and inclusion	22%	27%	30%	35%
The amount of tax it pays relative to its profits/revenues	16%	15%	20%	6%
The pay/reward it provides to senior executives relative to the average employee	24%	17%	23%	21%
The position the company's CEO/leader has taken on political issues	23%	10%	19%	11%

Q17) As a consumer, have you ever started or deepened a relationship with a business because of the following?

Q18) As a consumer, have you ever stopped or lessened a relationship with a business because of the following?

View of business

% **Millennials** and **Gen Zs** 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



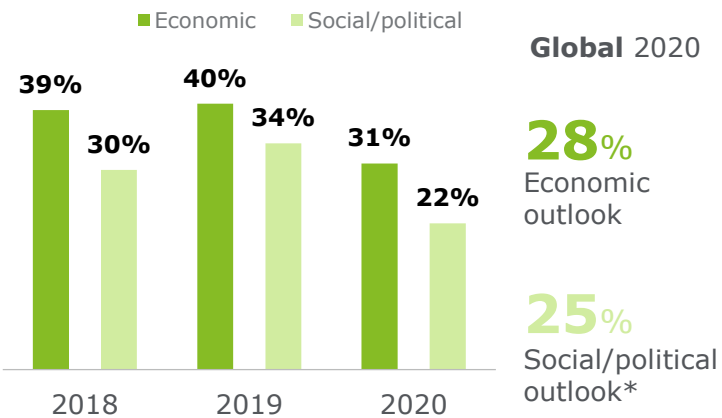
Q15) Do you think the following groups of people and organizations are having a positive or negative impact on you and the world in which you live? *Excludes China

Q16) Thinking of these same people and organizations, how much trust do you have in them as sources of reliable and accurate information? *Excludes China

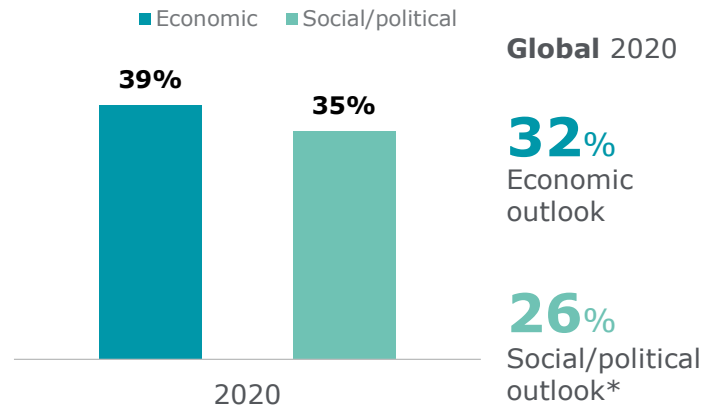
View of the world

% **Millennials** and **Gen Zs** who say the economic and social/political situations in their countries will improve in the next 12 months ...

South Africa



South Africa

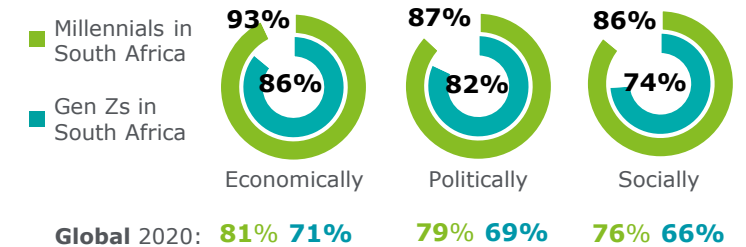


*Excludes China

Q2) Taking everything into account, do you expect the overall economic situation in {#Country} to improve, worsen or stay the same over the next 12 months?

Q3) Taking everything into account, do you expect the overall social/political situation in {#Country} to improve, worsen or stay the same over the next 12 months?

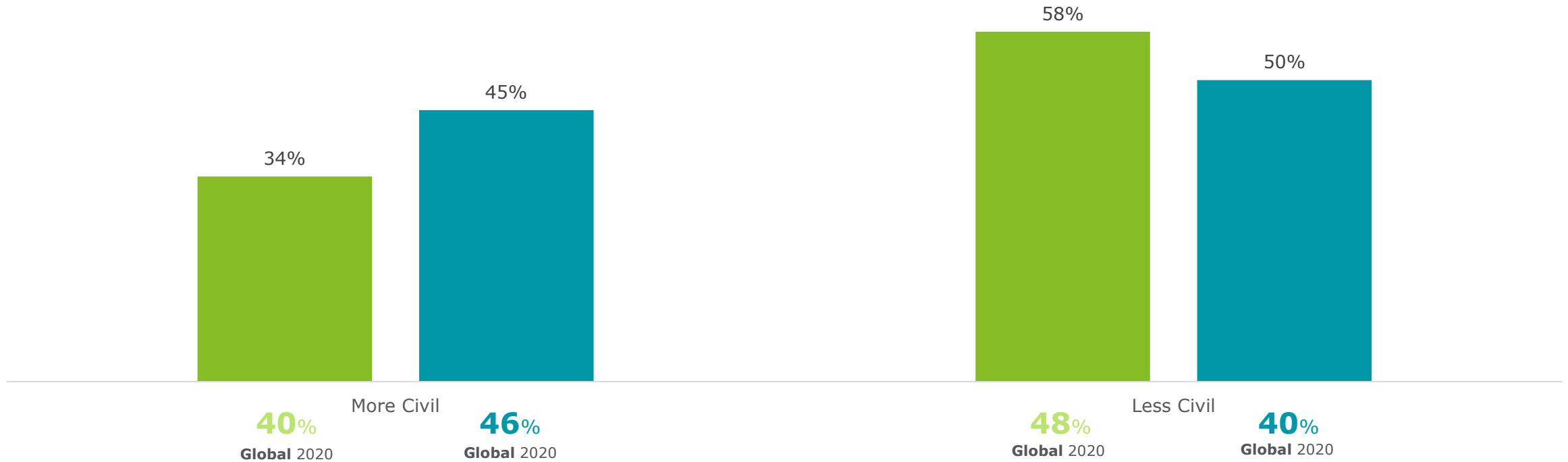
% **Millennials** and **Gen Zs** who strongly agree or tend to agree the world is becoming more divided/polarized ...



Q25) To what extent do you agree or disagree with the following statements? The world is becoming politically more divided/polarized (e.g. less tolerance of alternative points of view, resistance to compromise), the world is becoming socially more divided/polarized (e.g. less tolerance of other social groups/nationalities, weakening sense of community or shared values), the world is becoming economically more divided/polarized (e.g. the gap between the richest and poorest people is widening)

% **Millennials** and **Gen Zs** who say that we are becoming more or less civil toward one another ...

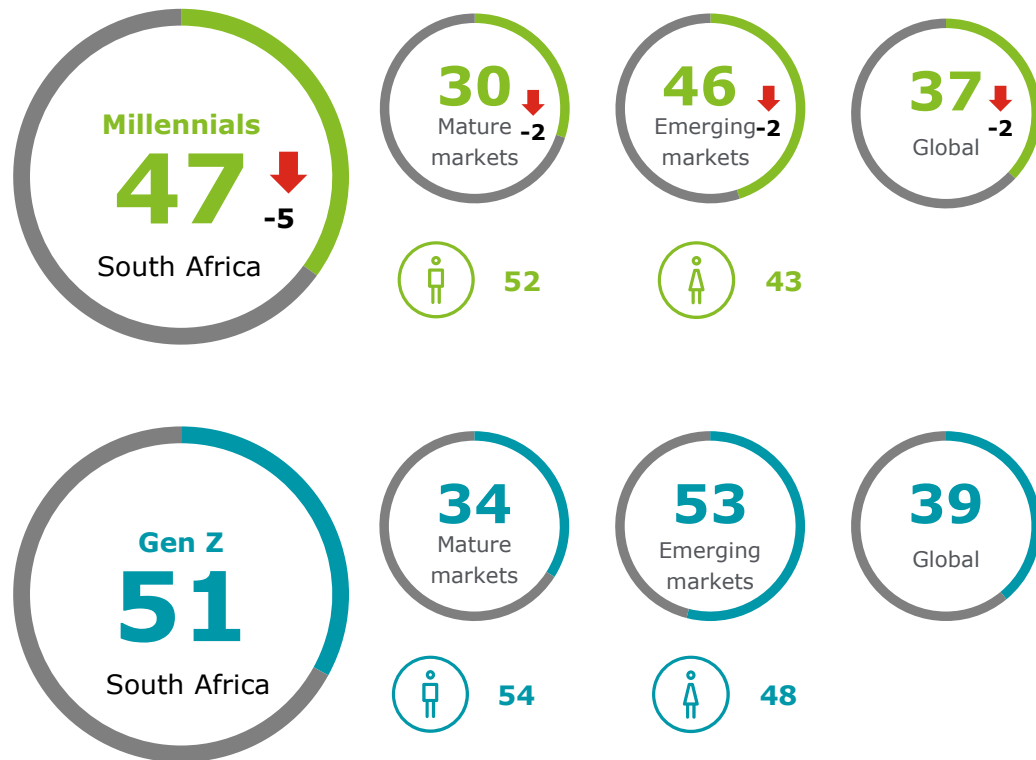
■ Millennials in South Africa ■ Gen Zs in South Africa



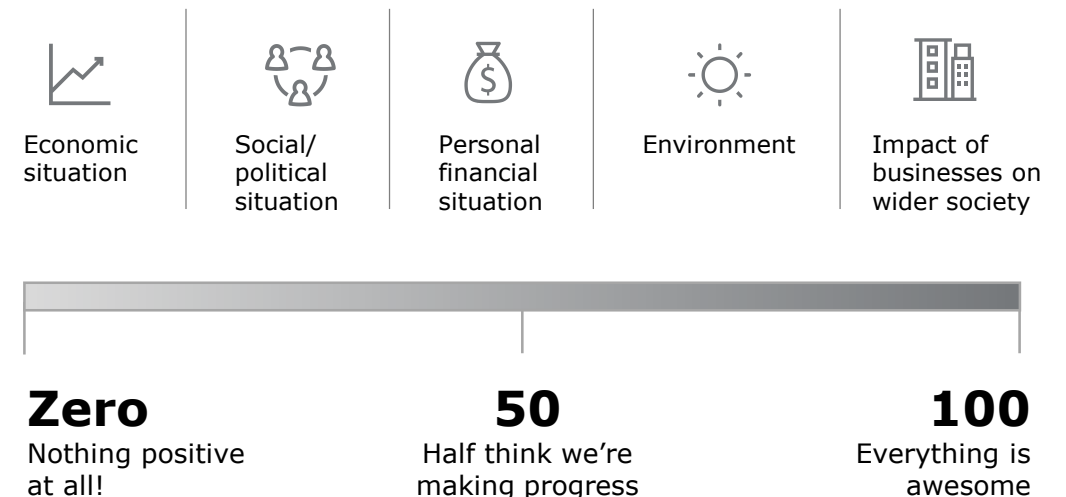
Q24) If 'civility' is defined as treating others with respect and politeness, do you think that, as a society, we are becoming more civil or less civil toward one another?

The “Millz Mood Index”

The Millz Mood Index gauges the mood of respondents and provides an annual snapshot of millennials’ and Gen Z’s optimism that the world and their places in it will improve



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



Note: Trends not shown for Gen Z data at a global and regional level due to changed country composition since 2019.



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