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Deloitte Global 2023 Gen Z and Millennial Survey

Country profile: Germany

Methodology and global key messages

Key global findings:

Broad societal change has spurred some workplace progress in recent years, but new setbacks are impacting Gen Zs' and millennials' ability to plan for their futures



Employers have made some progress since pre-pandemic times, but business more broadly is still not meeting expectations. Satisfaction with work/life balance, and employer progress on DEI, societal impact, and environmental sustainability have improved. While they are slightly more satisfied with their own employers, less than half are convinced that business more broadly is having a positive societal impact. But they continue to have high expectations for business leaders and expect them to drive progress on societal and environmental issues.



The cost-of-living crisis looms large for Gen Zs and millennials. Half of Gen Zs and millennials say they live paycheck to paycheck. They worry that a potential economic recession may cause employers to backtrack on climate action. They also worry it will hamper their ability to ask for much needed pay increases, to continue pushing for flexibility, or to find new jobs.



Gen Zs and millennials are rethinking the role of work in their lives. Roughly half of Gen Zs and millennials say work is central to their identity, but work/life balance is key. This is reflected in the fact that having a good work/life balance is the No. 1 trait they admire in their peers, and their top consideration when choosing a new employer.



Both generations said they still feel stressed or anxious all or most of the time. Their longer-term financial futures, day-to-day finances, and the health/welfare of their families are their top stress drivers, while concerns about mental health and workplace issues such as heavy workloads, poor work/life balance, and unhealthy team cultures are also challenging. Linked to the results around work-related stress drivers are increasingly high levels of burnout due to work pressures.



Harassment is at a worryingly high level in the workplace, particularly for Gen Zs. Three in five Gen Zs (61%) and around half of millennials (49%) have experienced harassment or microaggressions at work in the past 12 months. Inappropriate emails, physical advances, and physical contact are the most common harassment experiences, while exclusion, gender-based undermining and unwanted jokes are the most common microaggressions experienced. Around eight in 10 did report the harassment they experienced to their employer, but a third of Gen Zs and a quarter of millennials think the issues were not handled effectively.



Climate change is a major stressor for Gen Zs and millennials, and it's impacting their lifestyle and career decisions. Six in 10 Gen Zs and millennials say they have felt anxious about the environment in the past month. Their climate concerns impact their decision-making, from family planning and home improvements, to what they eat and wear. It also plays a key role in their career choices—more than half of respondents say they research a brand's environmental impact and policies before accepting a job.



Our methodology:

The 2023 Gen Z and Millennial Survey solicited the views of 14,483 Gen Zs and 8,373 millennials (22,000 respondents in total), from 44 countries across North America, Latin America, Western Europe, Eastern Europe, the Middle East, Africa and Asia Pacific.

Fieldwork was conducted between November and December 2022, with qualitative interviews conducted in March 2023.

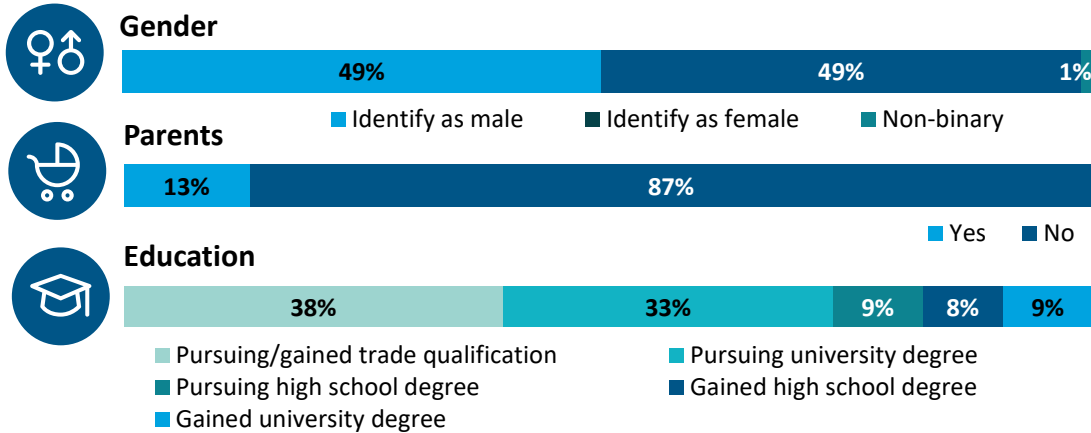
As defined in the study, Gen Z respondents were born between January 1995 and December 2004, and millennial respondents were born between January 1983 and December 1994.

The following deck examines how **Germany's Gen Zs and millennials** stand out from their global counterparts on these key themes.

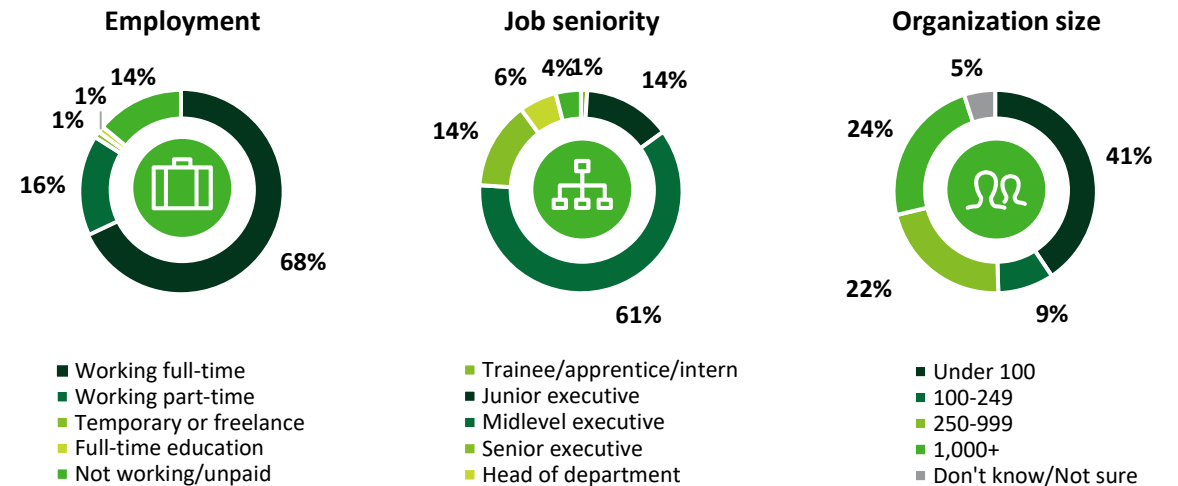
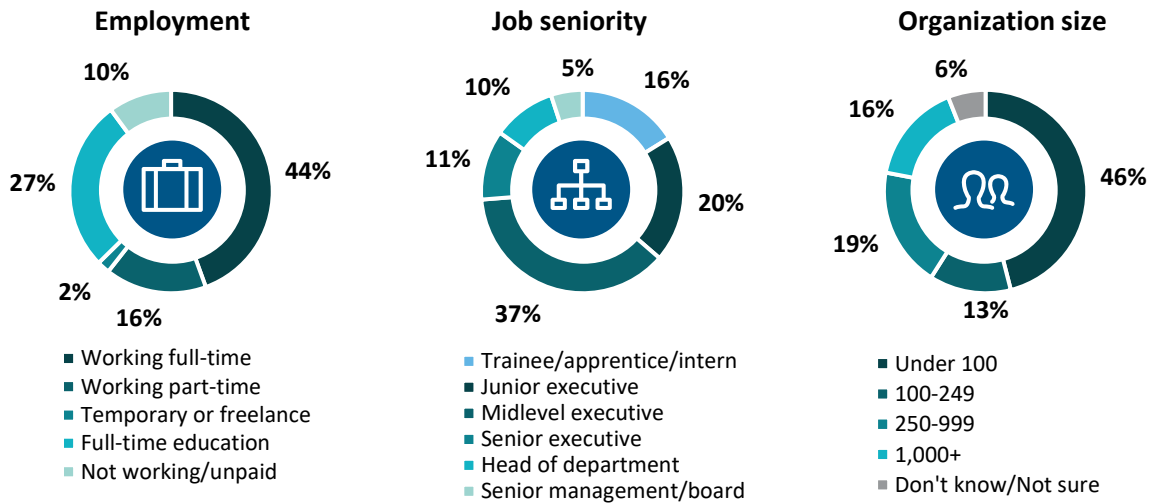
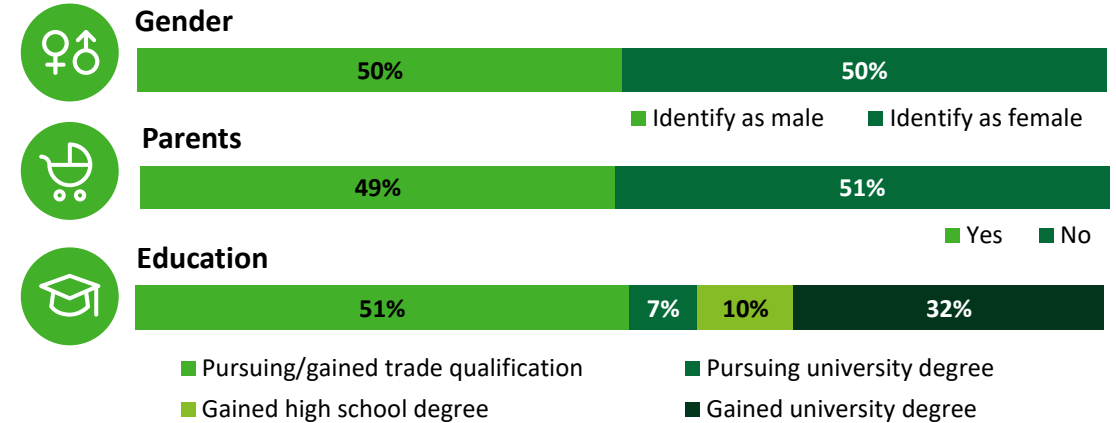
Country profile: Germany

801 total respondents in Germany: 500 Gen Zs and 301 millennials

GEN Z PROFILE



MILLENNIAL PROFILE

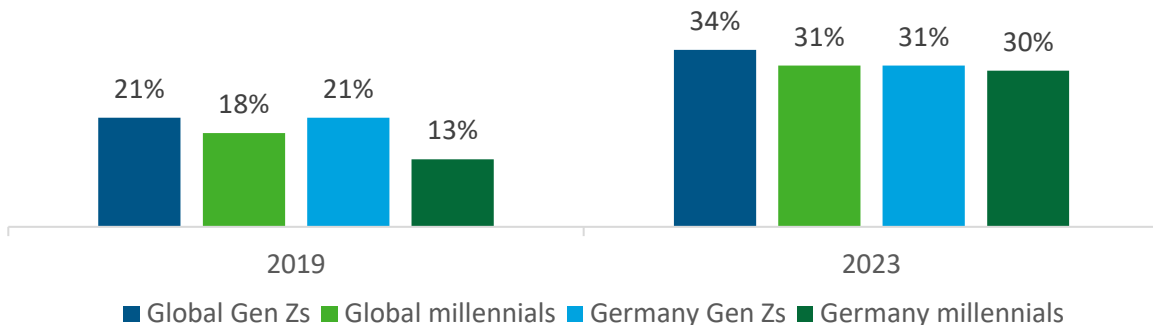


- As seen globally satisfaction with work/life balance for German Gen Zs and millennials has improved vs 2019, with German millennials most likely to have seen increased satisfaction
- We see a similar picture for organizations' DEI efforts, but satisfaction with societal impact has remained more stable and actually fallen among German Gen Zs, and the proportion who agree that action has been taken to protect the environment has not moved since 2019 for either cohort

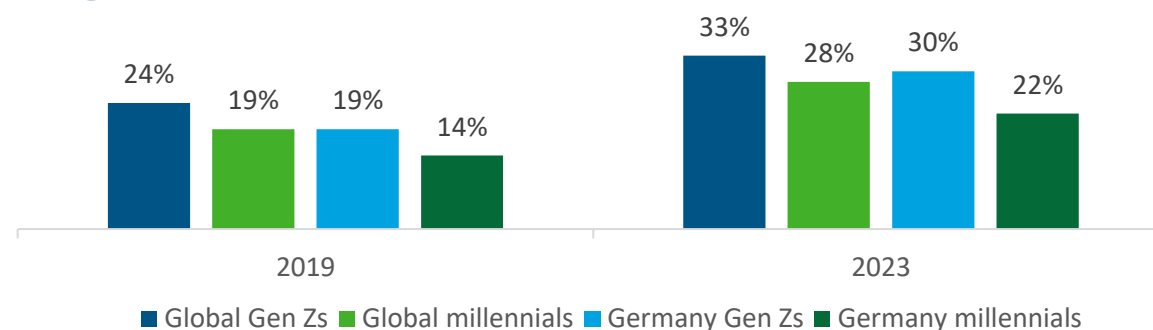
Employer Progress



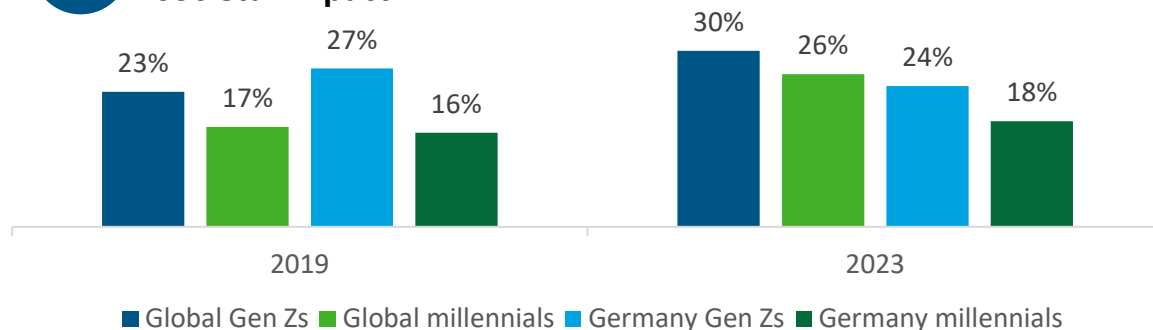
Percentage who are very satisfied with their current work/life balance in their job:



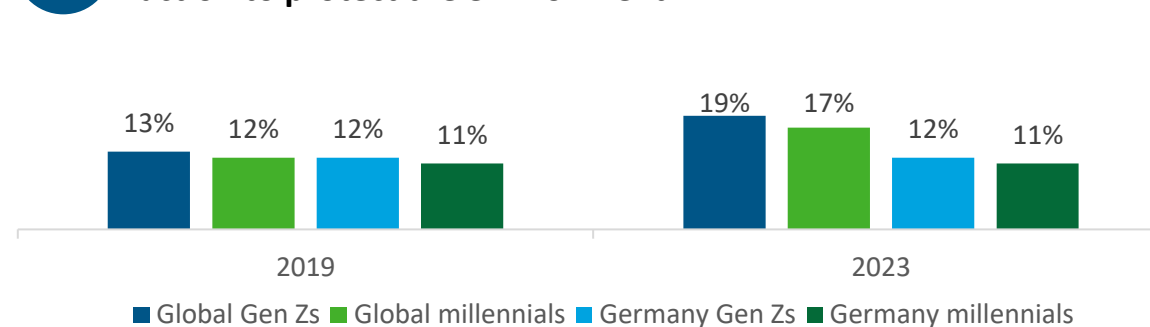
Percentage who are very satisfied with their organization's DEI efforts:



Percentage who are very satisfied with their organization's societal impact:



Percentage who strongly agree large companies are taking action to protect the environment:*



- As with the global findings, German Gen Zs and millennials believe business has a responsibility to highlight social issues, just behind politicians and social justice / sustainability advocates. However, perceptions of business's positive impact on society are much more muted, particularly among German millennials
- German Gen Zs are more likely to have rejected an assignment or employer than millennials, in line with the global findings. Fewer German Gen Zs and millennials believe they have the power to drive change in their organizations

Expectations of Business



Who has a significant responsibility to address societal and environmental issues?



Top groups considered to have an important/leading role in highlighting social issues in Germany

Politicians Social justice / sustainability advocates Business leaders

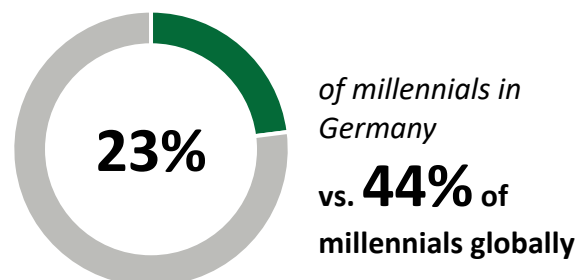
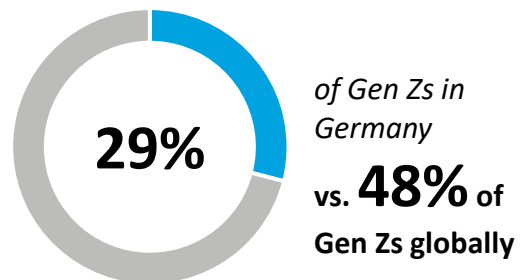


Groups considered to have a less important role in highlighting social issues in Germany

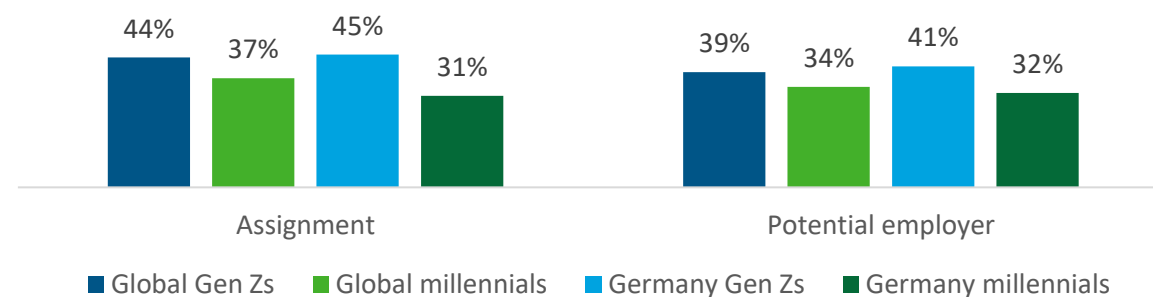
Entertainers Religious leaders Sports stars



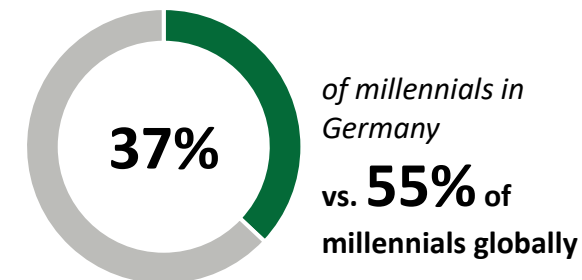
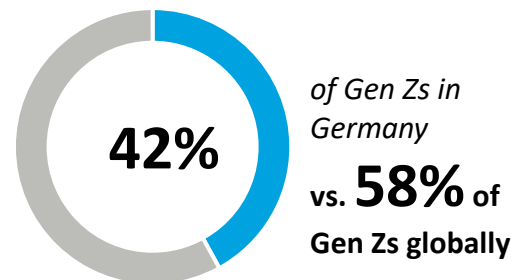
Percentage of respondents who think businesses have a very/fairly positive impact on society:



Percentage of respondents who have rejected an assignment, or a potential employer based on their personal ethics/beliefs:



Percentage of respondents who believe they have the power to drive change; that their organization seeks input from employees and incorporates feedback:



- Cost of living, as seen at the global level is of most concern to German Gen Zs and millennials, with climate change and political instability rounding out the top 3 and consistent across both cohorts
- Resource scarcity, which is outside of the top 5 at a global level takes the 4th spot with unemployment the 5th highest concern for German Gen Zs and healthcare taking this spot among German millennials

Top concerns

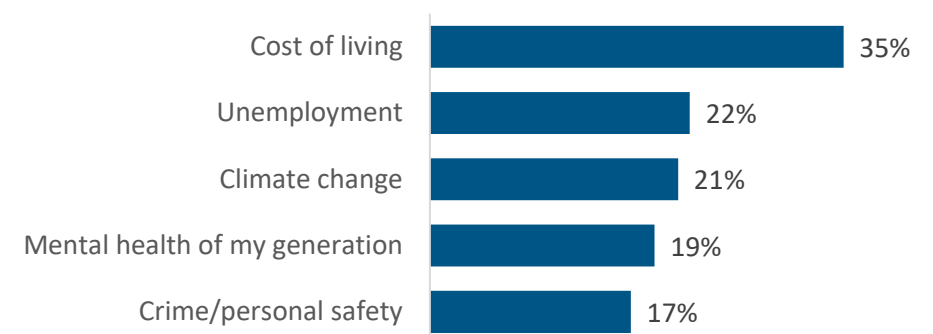


Top five issues of greatest concern:

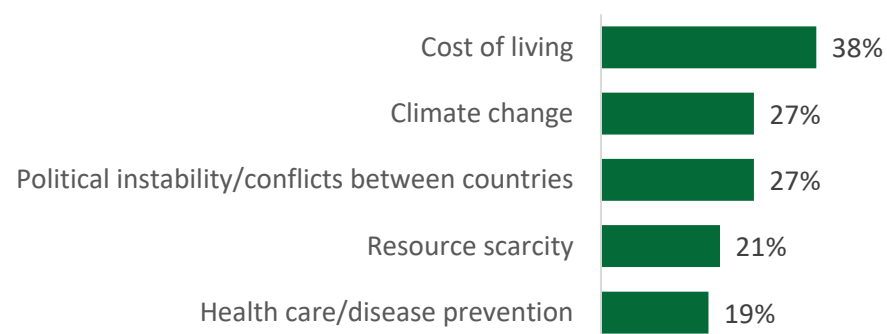
Germany Gen Zs



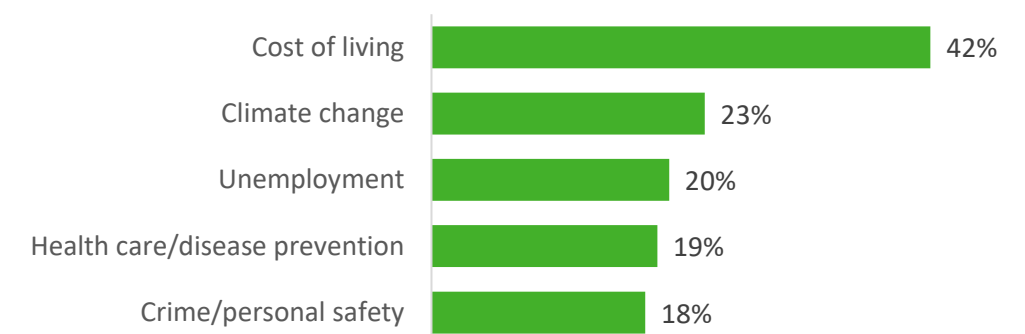
Global Gen Zs



Germany millennials



Global millennials



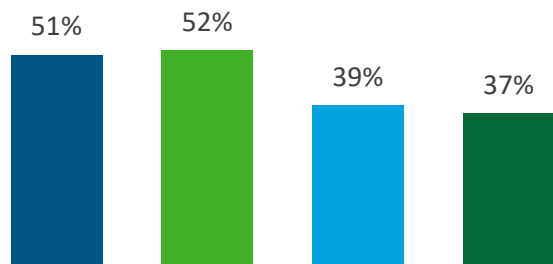
- Just over 1/3 of German Gen Zs and millennials are living paycheck to paycheck, significantly below the global average
- As seen at a global level, should the economy not improve buying a house is the top area that German Gen Zs and millennials believe will become harder or impossible, with German millennials showing higher levels of concern around asking for a raise or a promotion and Gen Zs around their ability to start a family

Cost of living



Percentage of respondents who live paycheck to paycheck and worry they won't be able to cover their expenses:

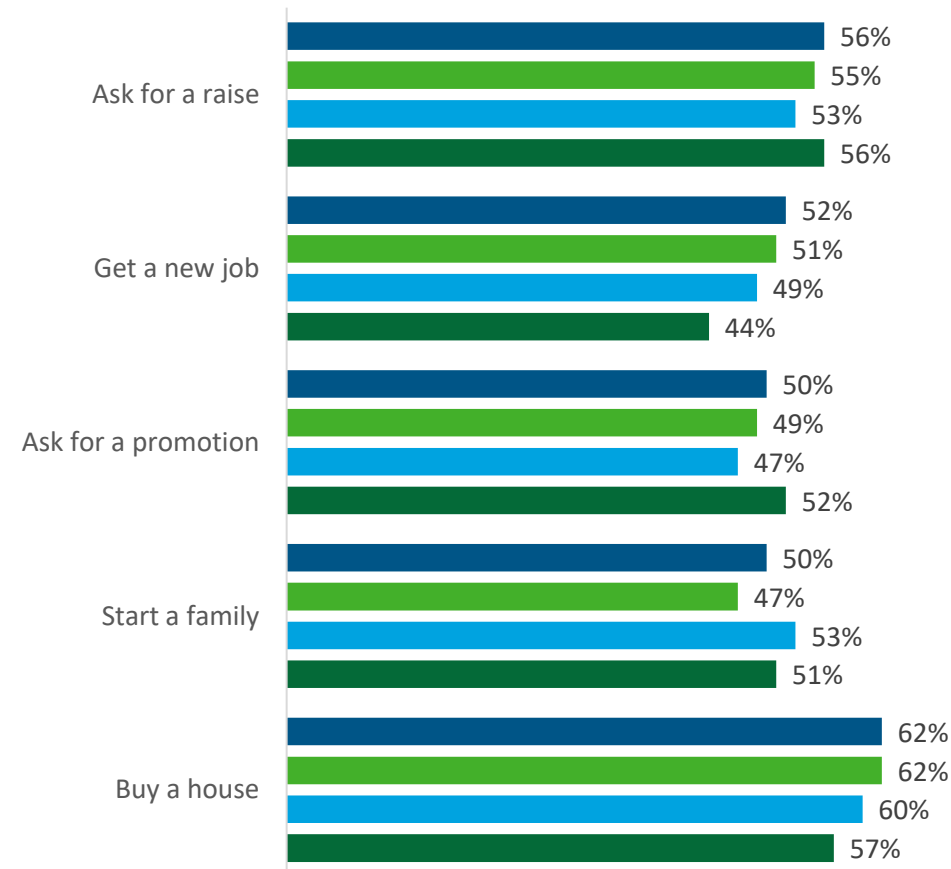
Selected strongly agree/agree



■ Global Gen Zs ■ Global millennials ■ Germany Gen Zs ■ Germany millennials



Percentage of respondents who say that it will become harder or impossible to achieve the following if the economy does not improve within the next 12 months:



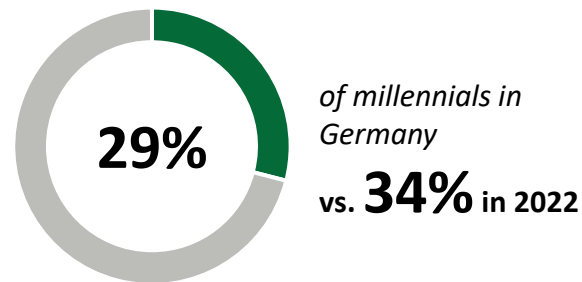
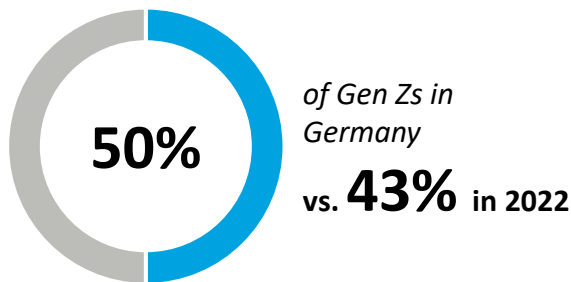
■ Global Gen Zs ■ Global millennials ■ Germany Gen Zs ■ Germany millennials

Side jobs

- German Gen Zs are significantly more likely than millennials (and more likely than the global average) to have a side job, while fewer than 3/10 German millennials have one
- Gig work is the most held side job for both audiences in Germany with additional income, while still important, less pronounced as a driver, and those German millennials that do have a side job seeing it more as a way to develop important skills and relationships



Those who have taken on either a part- or full-time paying job in addition to their primary job:



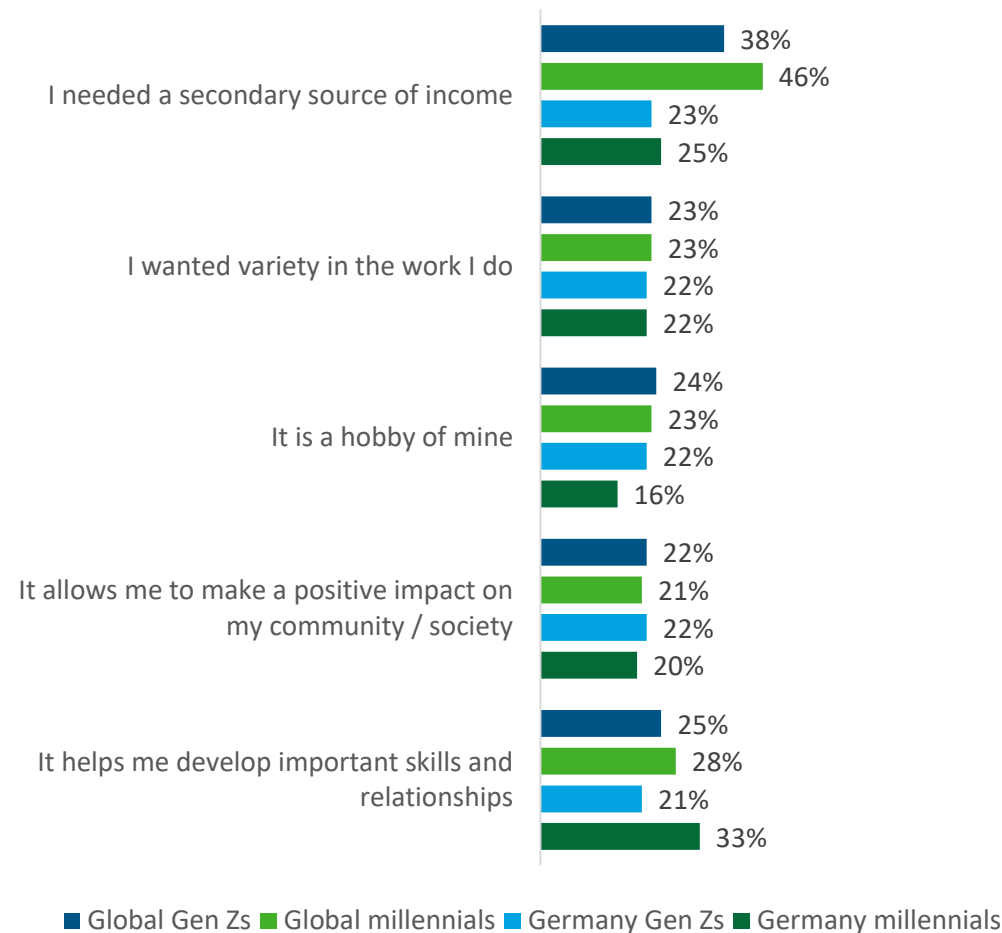
Top side jobs held in Germany*:

	Gen Zs	Millennials
Flexible 'gig' work - taxi and food delivery apps	24%	33%
Selling products or services through online platforms	18%	16%
Pursuing artistic ambitions	18%	15%
Consulting/running your own business	18%	20%
Working in a restaurant or retail store	17%	14%

*Caution, small base (millennials: 47)



Why did they decide to take on a side job?
Top five reasons selected.

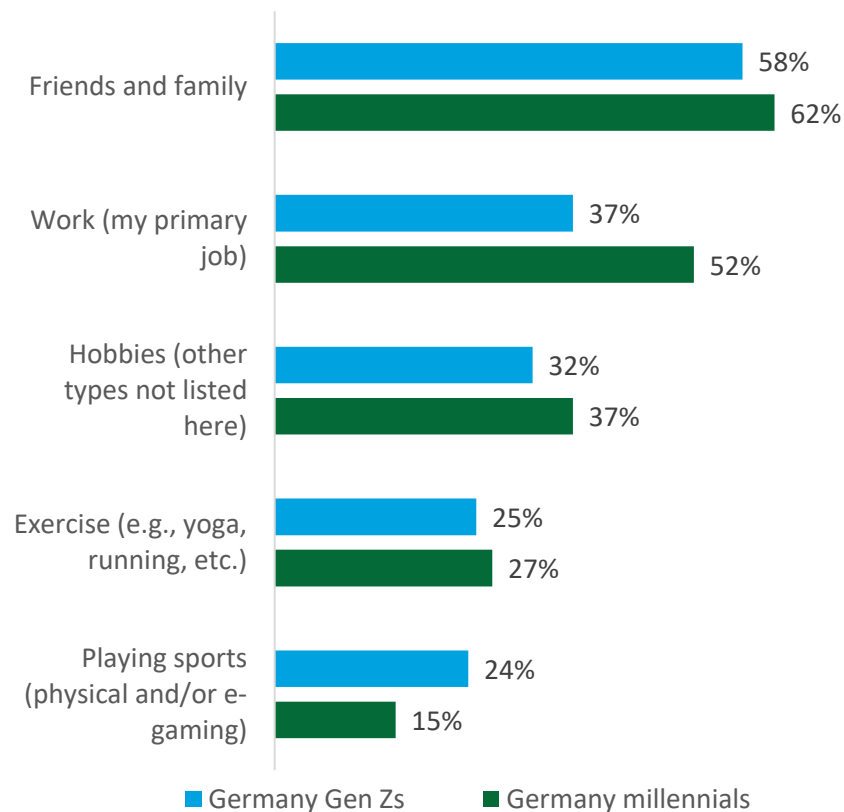


- Friends and family are the most important drivers of self identity for both German Gen Zs and millennials, followed by work which is more pronounced for German millennials
- Achieving a positive work/life balance and dedication to family and friends are lead areas that impress both German Gen Zs and millennials about their peers, with salary less of a consideration for German millennials

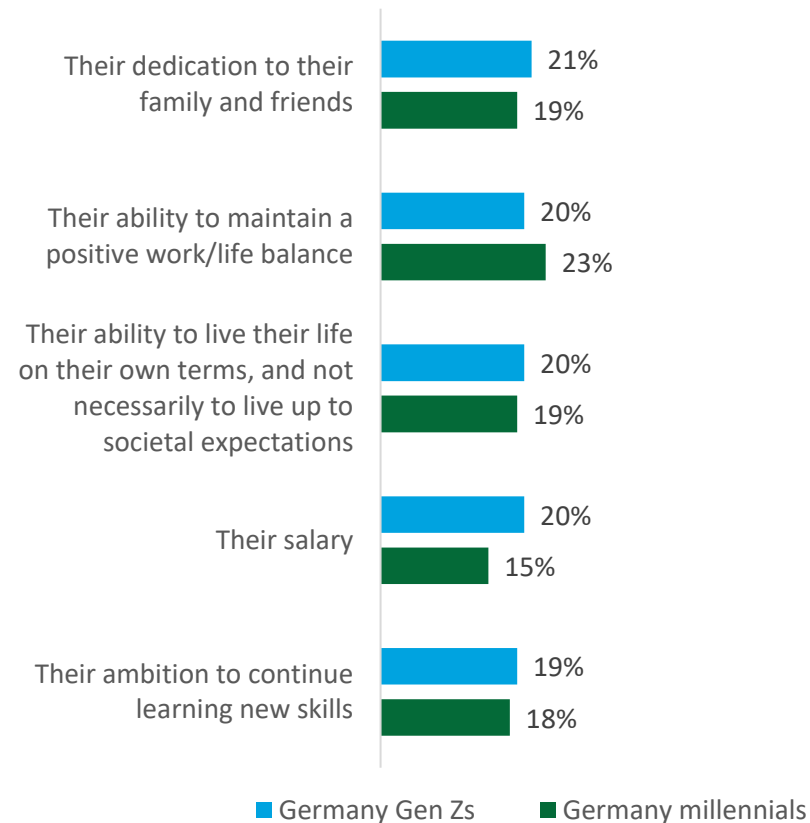
Sense of identity and admired qualities



Top five factors selected as the most important to their sense of identity:



Top five factors selected as the things that impress them the most about peers:

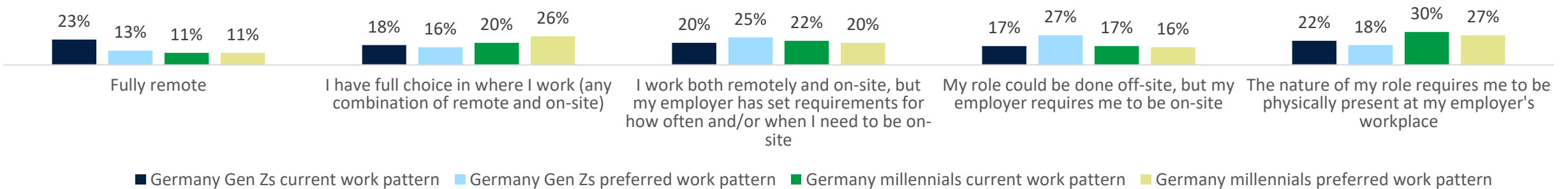


- Almost a quarter of German Gen Zs currently work fully remotely, and ideally, they would like to shift towards a more structured approach, with at least some planned work on site. German millennials are, on the whole more satisfied with their current working situation and more likely to want the option to work remotely
- There is a strong preference for choice among both generations, with a majority saying they would look for a new role if asked to be back on-site full time

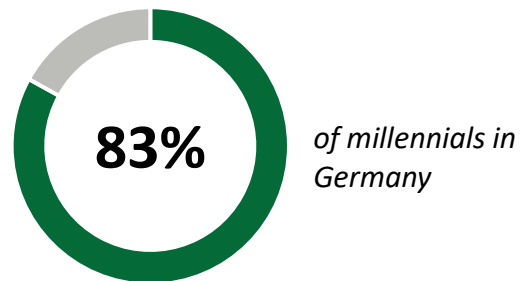
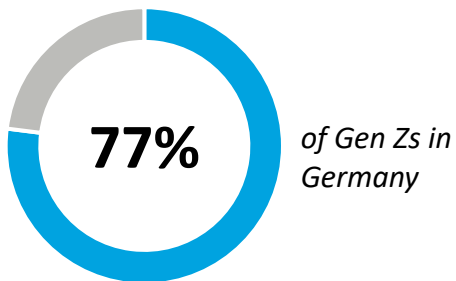
Hybrid work preferences



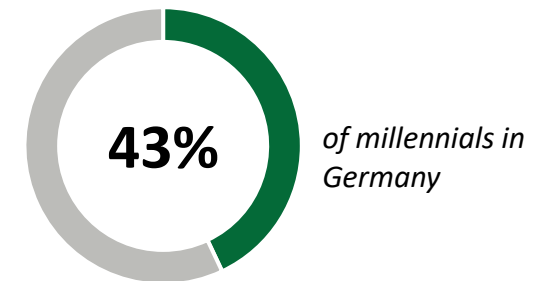
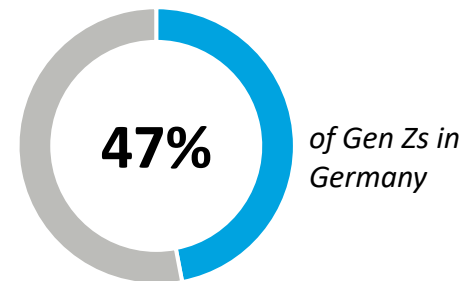
Which of the following best describes their current situation when it comes to their place of work, and which would be their preferred situation?



Percentage of respondents who would consider looking for a new job if their employer asked them to go on-site full-time:



Percentage of respondents who said it will still be possible to ask for more flexibility at work even if the economic situation in their country worsens or stays the same in the next 12 months:

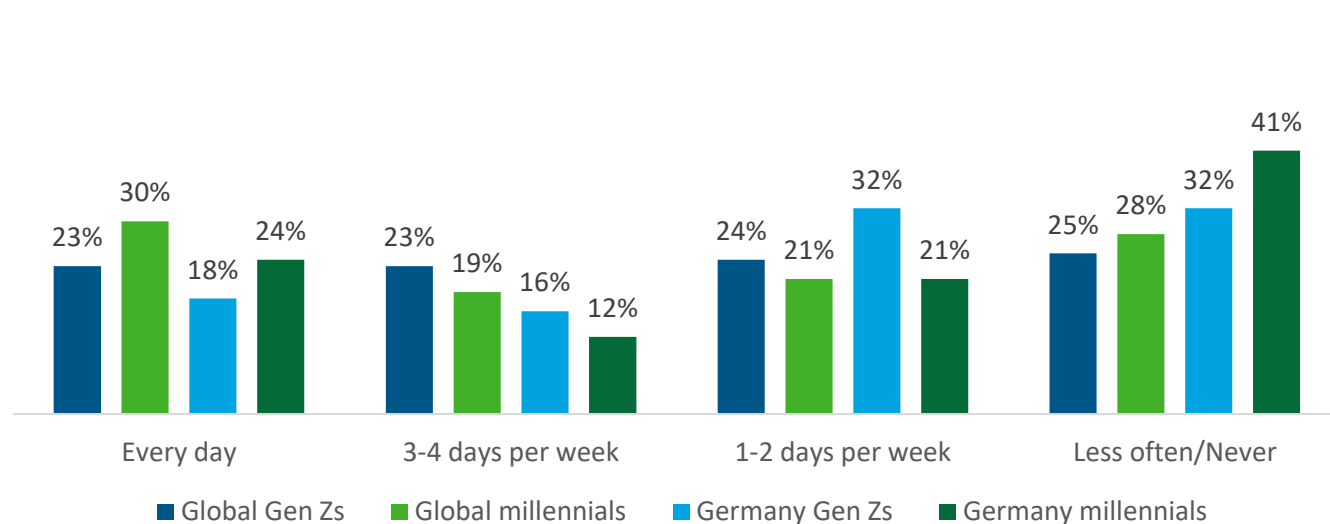


- While a quarter of German millennials respond to emails outside of working hours every day they are, overall, less likely to feel the need to engage outside of office hours than their counterparts globally, and more likely than German Gen Zs to never feel the need to do so
- Seniority of sender is the main reason cited by both Gen Zs and millennials for responding to emails / messages outside of office hours, with those millennials that do more likely to cite staying up to date as a core reason

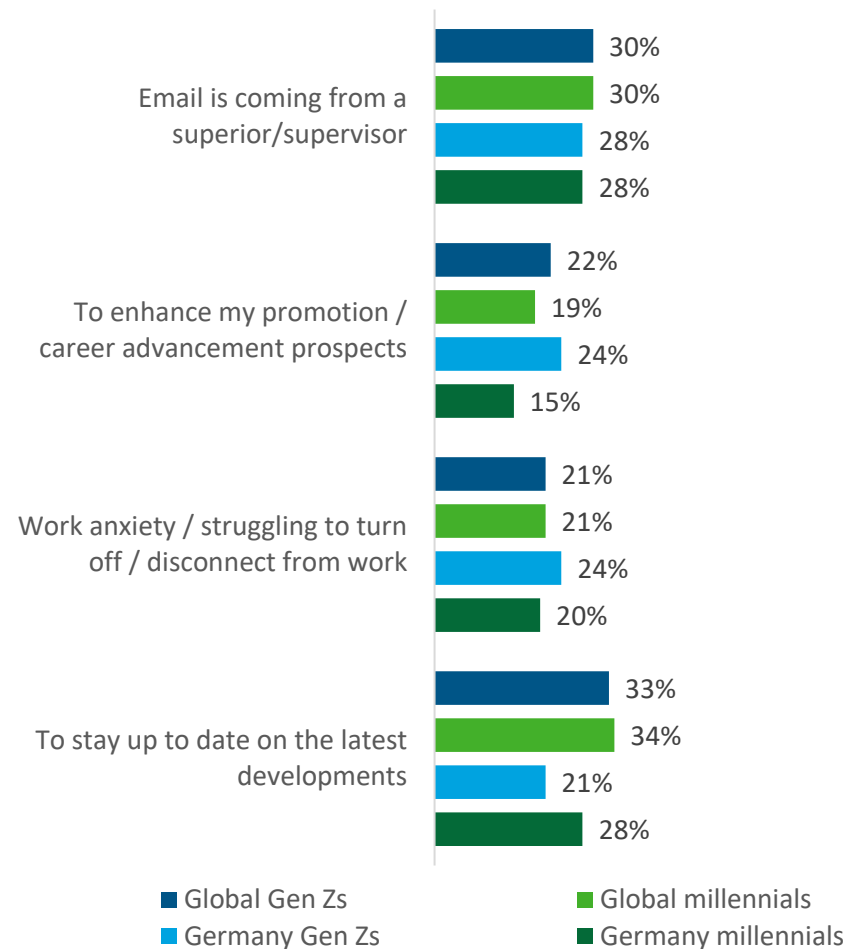
The struggle to disconnect



Percentage who find themselves responding to work emails/messages outside of normal working hours:



Main reasons selected for responding to work emails/messages outside of normal working hours:

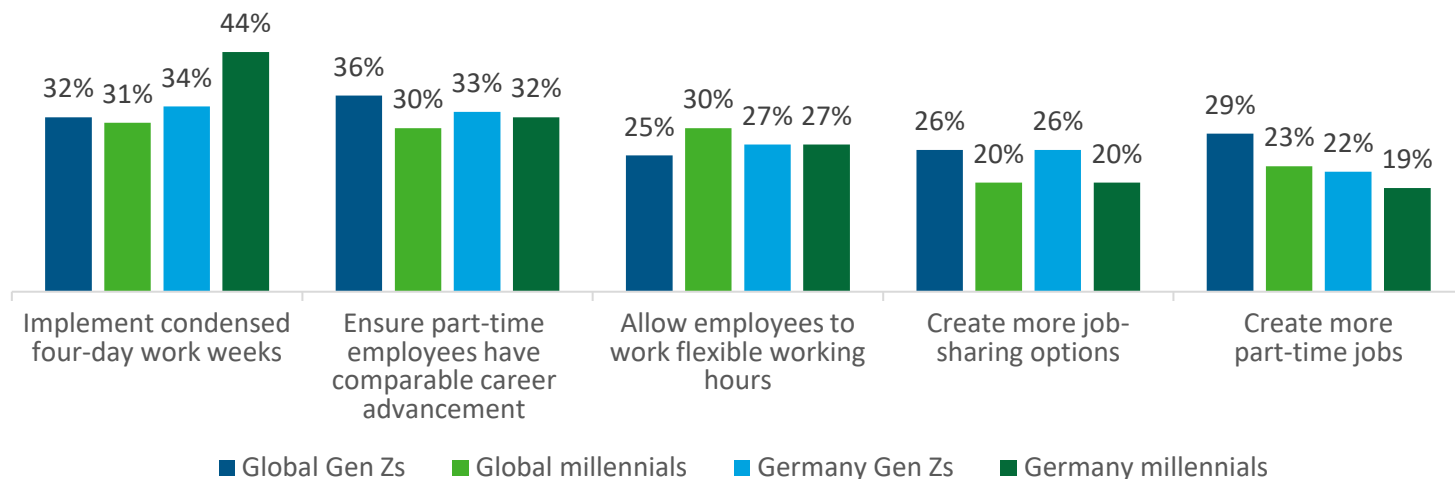


Work/life balance and flexible work

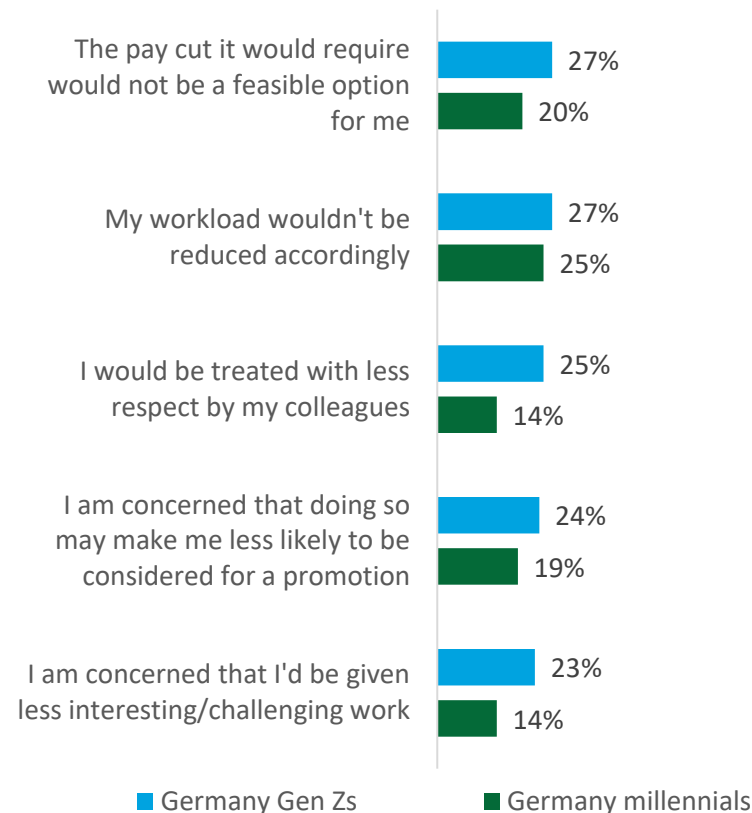
- German Gen Zs and millennials see the implementation of a condensed 4-day work week as the best way that organizations could foster better work/life balance, even more so than their counterparts globally. They also would like employers to offer better career advancement opportunities for part-time employees
- Many don't think reducing their hours is feasible as they can't afford a pay cut, and other concerns such as workload and being treated with less respect by colleagues are hindering the adoption of flexible work practices



In which of the following areas should organizations focus to help foster better work/life balance for their employees?



Factors which are preventing respondents from taking advantage of flexible work, or from reducing their hours: (Flexible work refers to work patterns that provide greater choice over **when** people work).

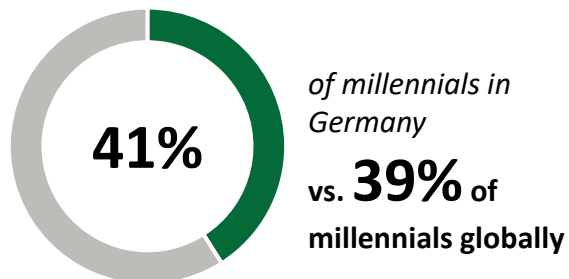
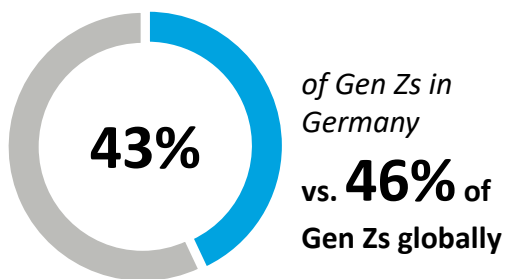


- Around one in four German Gen Zs and millennials say they feel anxious or stressed all or most of the time, with both audiences citing their long-term financial future as a core driver of stress
- German millennials show lower stress in relation to family, mental health and day to day finances than their Gen Z counterparts
- Almost half of German Gen Zs feel burned out, up significantly from last year

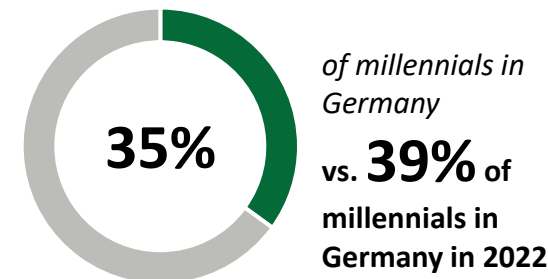
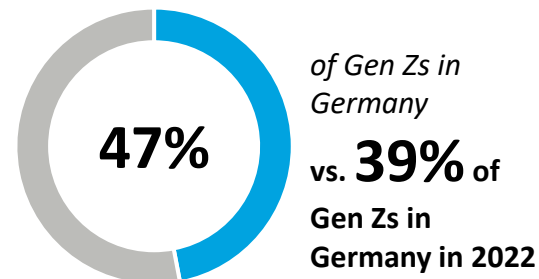
Stress and burnout



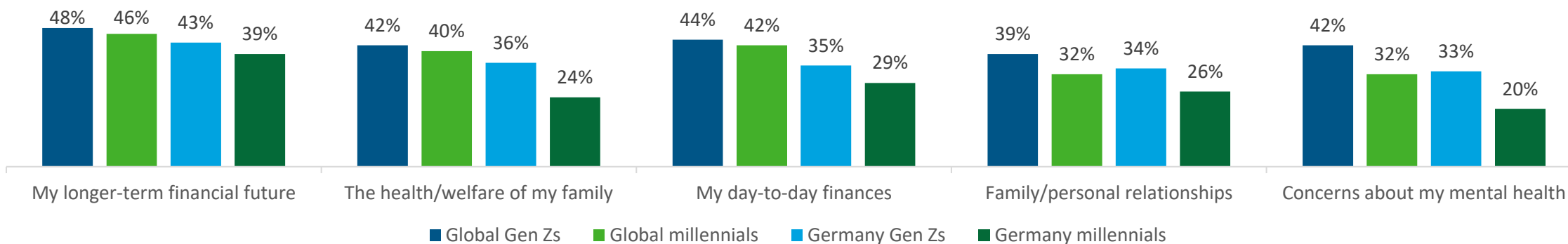
Percentage of respondents who say they feel anxious or stressed all or most of the time:



Percentage who feel burned out due to the intensity/demands of their workloads (strongly/somewhat agree):



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



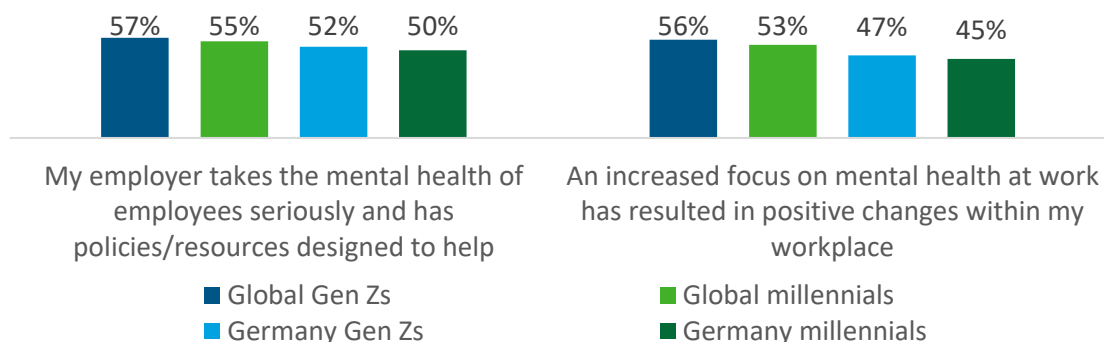
*Asked only of those who feel anxious or stressed

- The majority of German Gen Zs and millennials feel that their employers take mental health seriously, but they are less likely than their global counterparts to say they have seen this result in positive change in their workplace
- Employers' mental health policies are likely to be considered when choosing a role in Germany, but less so than seen globally. German Gen Zs and millennials are less likely to feel comfortable speaking with their managers about mental health, and less than 1 in 5 would share the reason for taking time off to deal with these issues

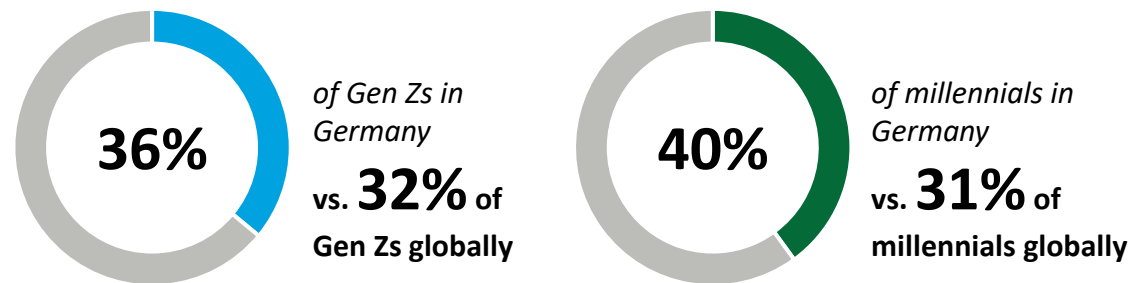
Workplace mental health



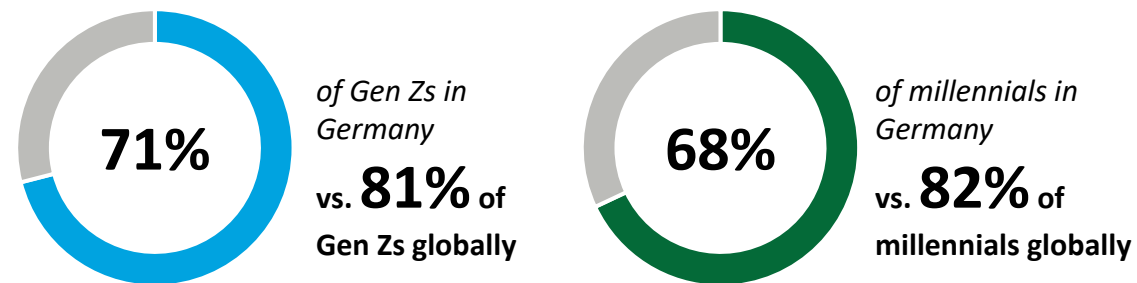
Percentage of respondents who strongly agree/agree with the following statements related to workplace well-being/mental health:



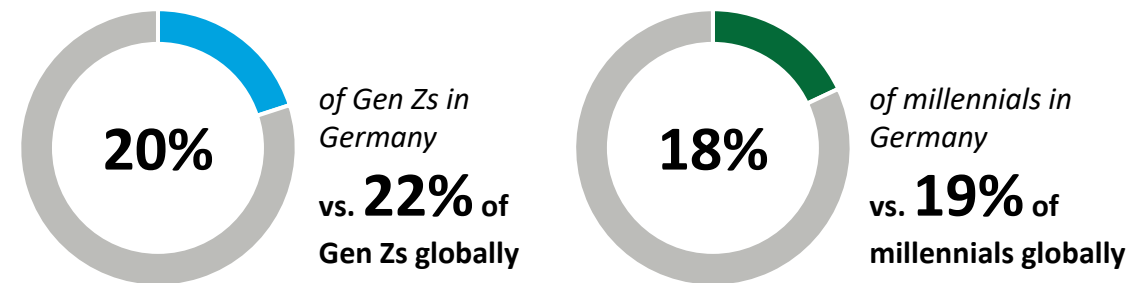
Percentage of respondents who would not feel comfortable speaking openly with their direct manager about stress, anxiety, or other mental health challenges:



Percentage of respondents who say that mental health support and policies are very/somewhat important when considering a potential employer:



Percentage of respondents who have taken time off work due to feelings of anxiety or stress but gave their employer a different reason:



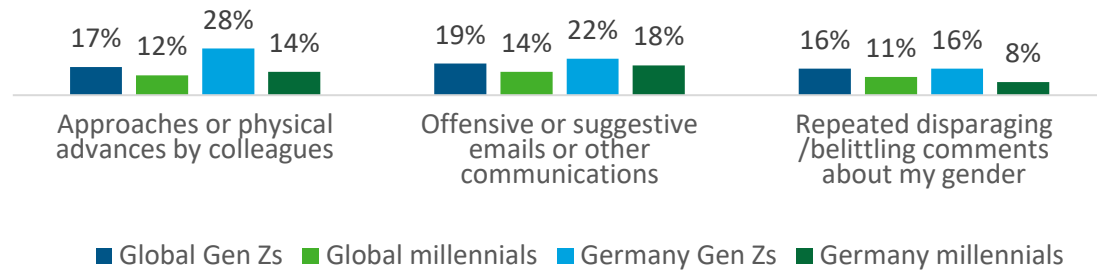
Workplace harassment and microaggressions

- Over two thirds of German Gen Zs and nearly half of millennials have experienced harassment or microaggressions at work in the past year. This is roughly aligned with the global average (61% of Gen Zs and 49% of millennials globally experienced these behaviors)
- German Gen Zs and millennials are slightly less likely to report these experiences to their employers, and to have felt that it was handled well

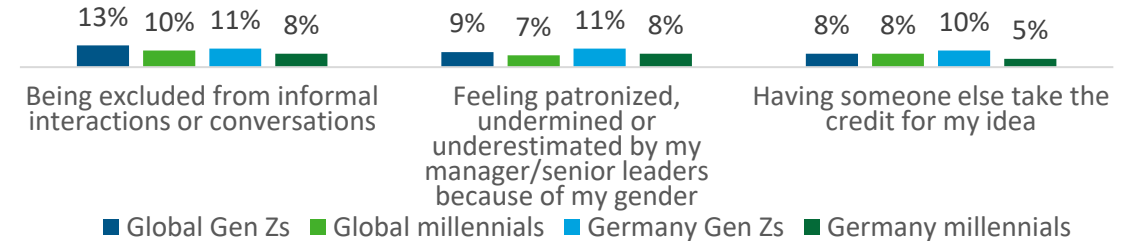


68% of Gen Zs and 47% of millennials in Germany have experienced harassment or microaggressions at work in the past 12 months.

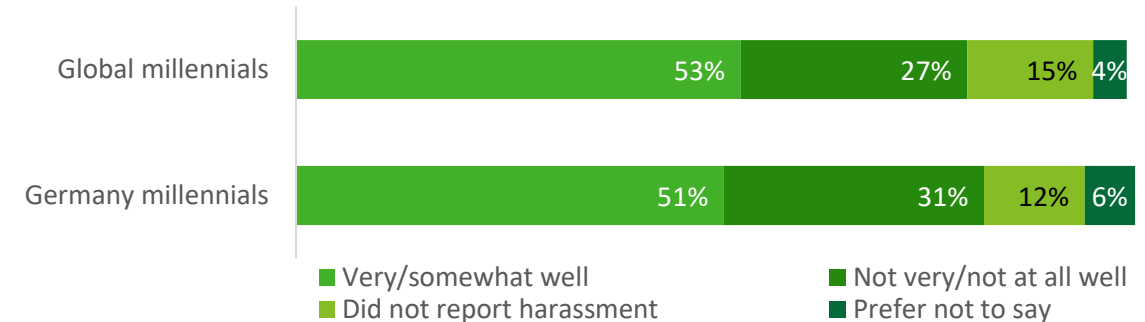
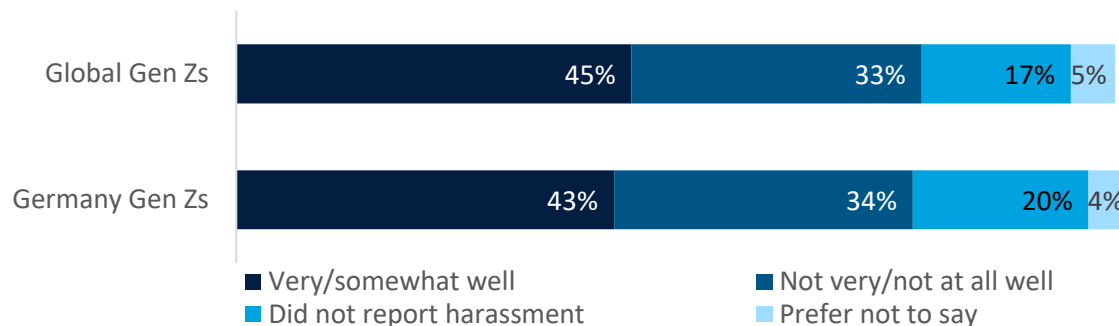
Top harassment behaviors experienced



Top microaggressions experienced



Percentage of respondents who said they reported the harassment that they experienced, and how their organization handled the issue:

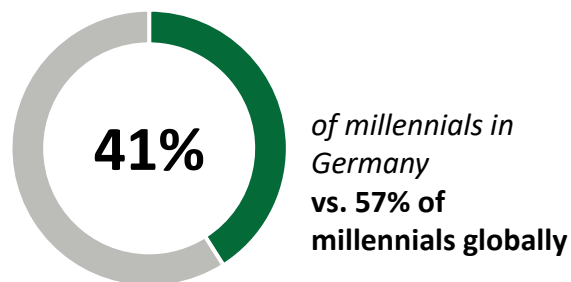
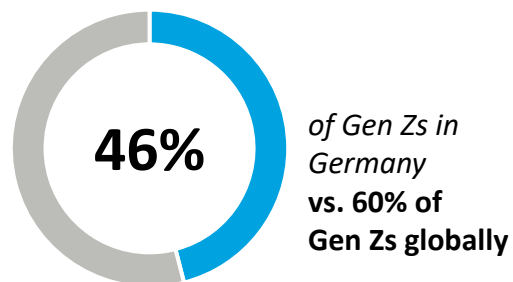


Climate anxiety and actions

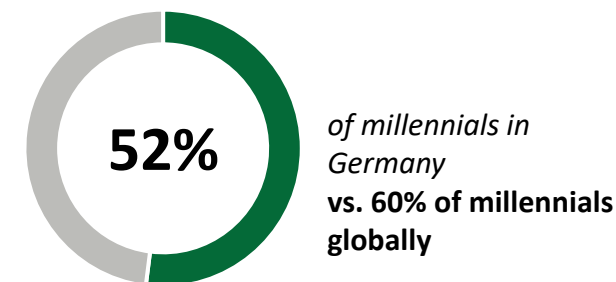
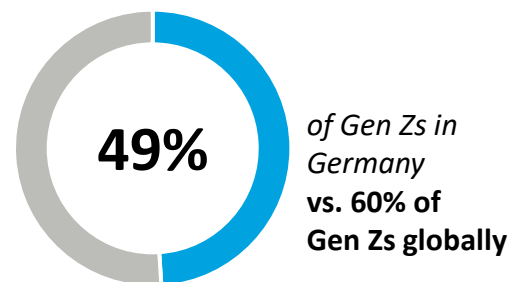
- German Gen Zs show higher climate concern than millennials, but levels are lower than the global average, with around half of German Gen Zs and millennials willing to pay more for sustainable products or services
- Avoiding fast fashion is the action most taken so far by German Gen Zs and millennials to combat their environmental impact, with energy efficient homes a key current and future action.
- Conducting research to check sustainability credentials is an area both audiences are likely to increase in the future

Percentage of respondents selecting strongly agree or agree to the following statements:

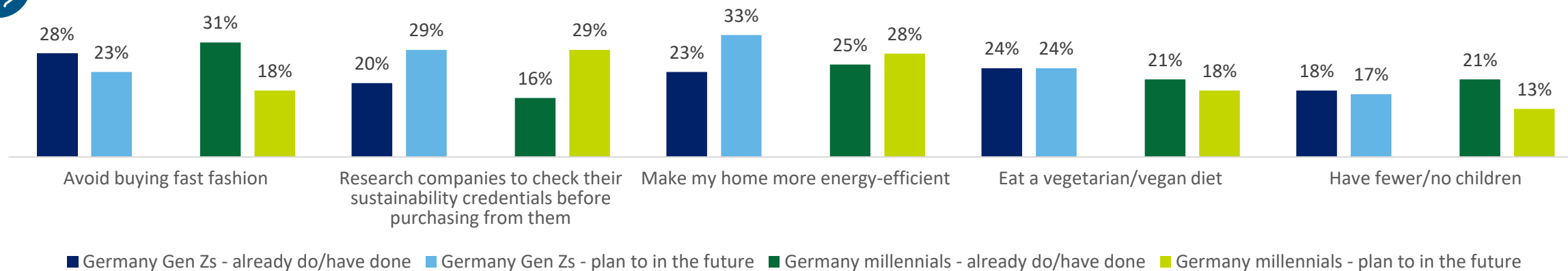
In the last month, I have felt worried or anxious about climate change



I am willing to pay more to purchase environmentally sustainable products or services



Actions taken or intended in the future to reduce their environmental impact:

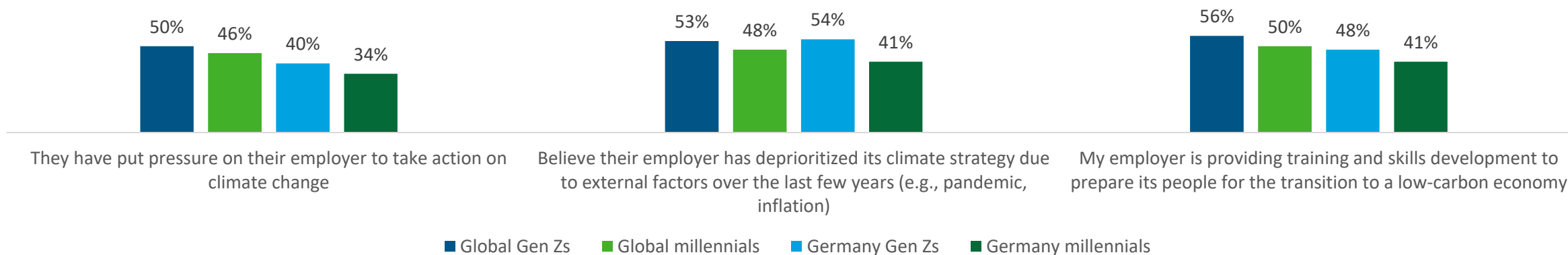


Perceptions of employers' climate action and where respondents want them to focus

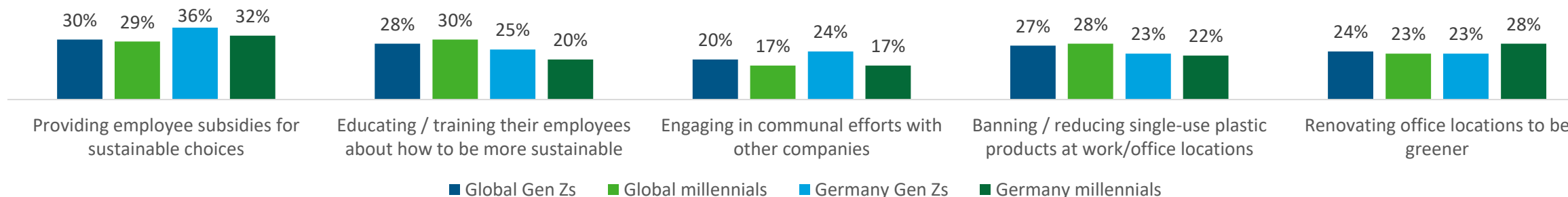
- Lower levels of German Gen Zs and millennials have put pressure on their employers to take climate action, and both are less likely to feel training is in place for the move to a low-carbon economy
- Sustainable subsidies are seen as the best way for business to fight climate change, with German Gen Zs seeing education and communal efforts with other companies as important, vs a higher importance placed on greener workplaces for German millennials



Percentage of respondents who strongly agree/agree with the following statements:



Ranking of where employed Gen Zs and millennials in Germany feel their organizations should invest more resources to help combat climate change:



Millz Mood Monitor

The Millz Mood Monitor gauges the mood of respondents and provides an annual snapshot of Gen Zs' and millennials' optimism that the world and their places in it will improve.

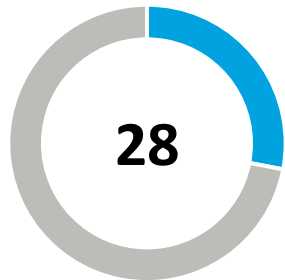
*Scores are based on responses to questions on the following five topics and are aggregated to create a measure between zero (absolute pessimism) and a hundred (complete optimism).



GEN ZS:

Gen Zs in Germany:

↑ +2 pt.



Identify as female:

23



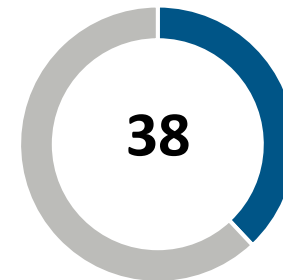
Identify as male:

33



Gen Zs globally:

↑ +2 pts.



Identify as female:

34



Identify as male:

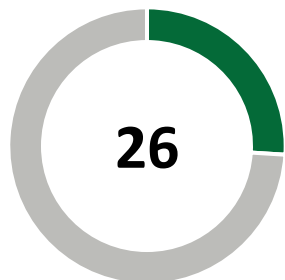
42



MILLENNIALS:

Millennials in Germany:

↓ -4 pts.



Identify as female:

20



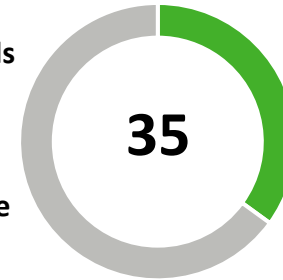
Identify as male:

31



Millennials globally:

No change



Identify as female:

32



Identify as male:

37



*Global scores don't include China.



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