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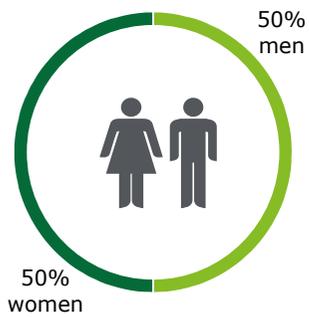
The 2018 Deloitte Millennial Survey

Germany
May 2018

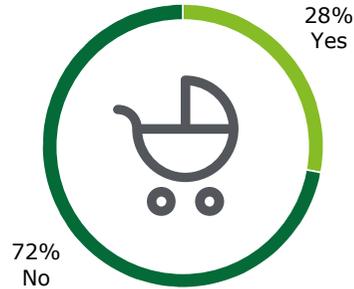
Background

406 Millennial interviews achieved in Germany (all in full-time employment)

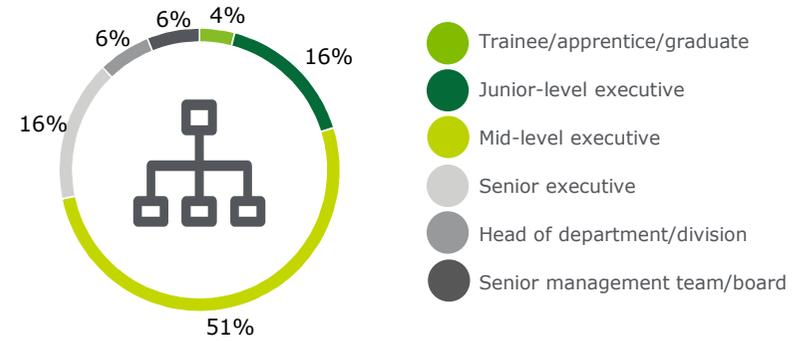
Gender



Have children

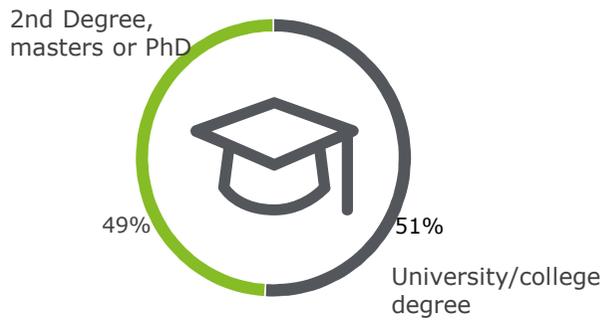


Job seniority/level

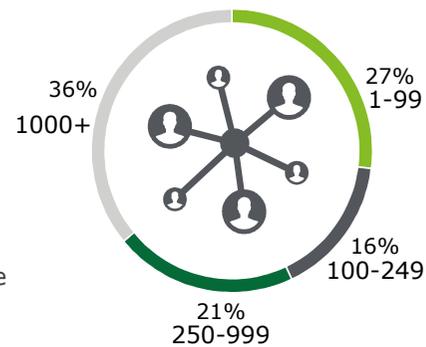


- Trainee/apprentice/graduate
- Junior-level executive
- Mid-level executive
- Senior executive
- Head of department/division
- Senior management team/board

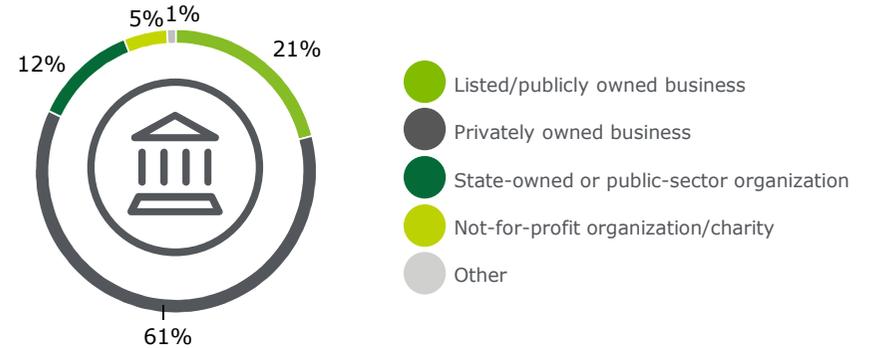
Education level



Organization size

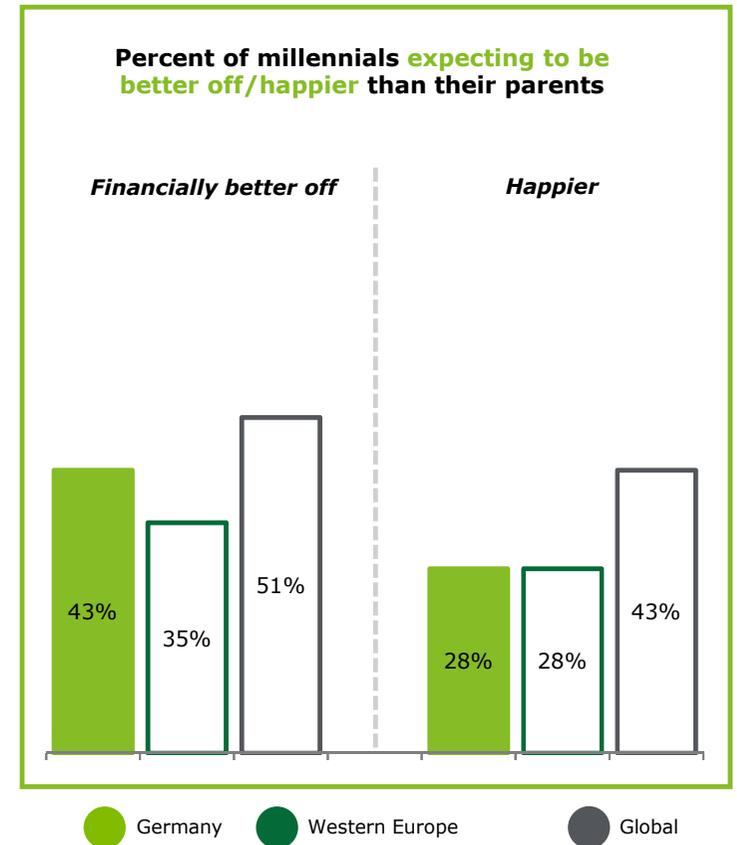
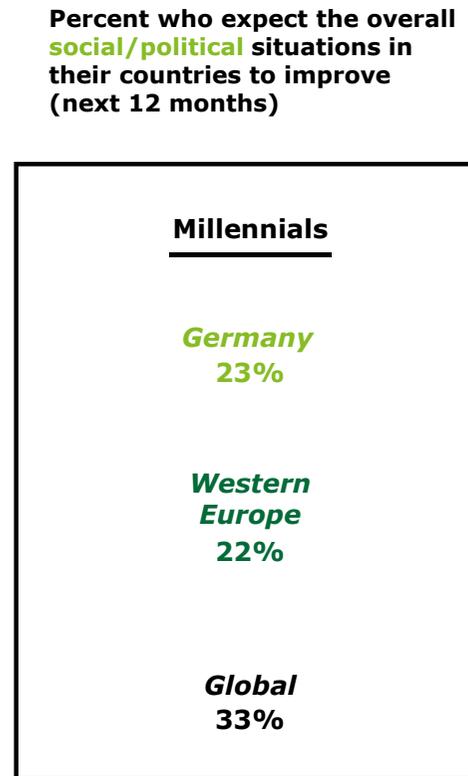
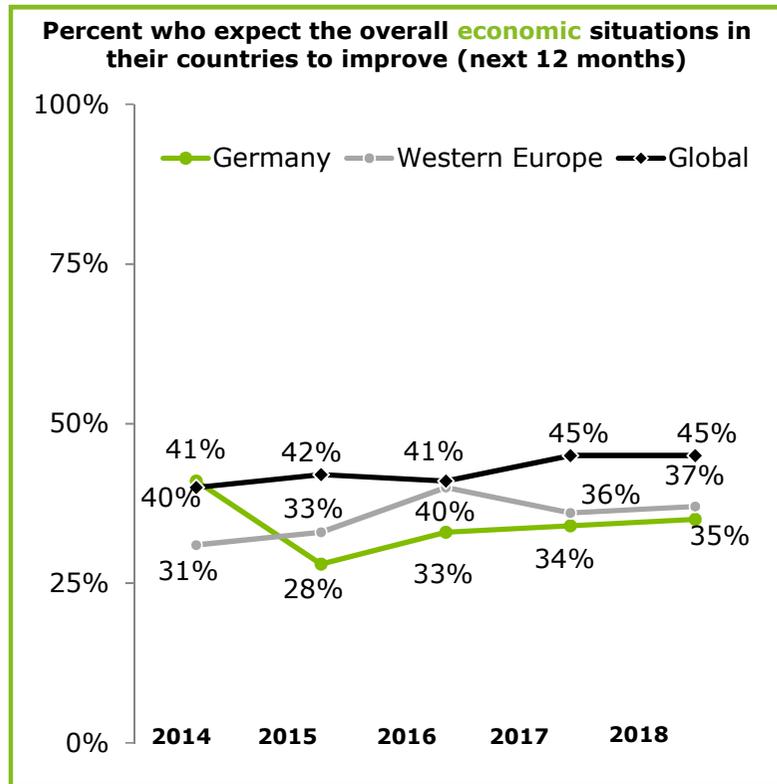


Organization type

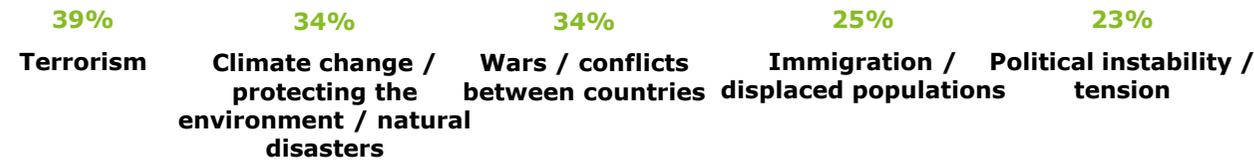


- Listed/publicly owned business
- Privately owned business
- State-owned or public-sector organization
- Not-for-profit organization/charity
- Other

Germany economic, political and social outlook



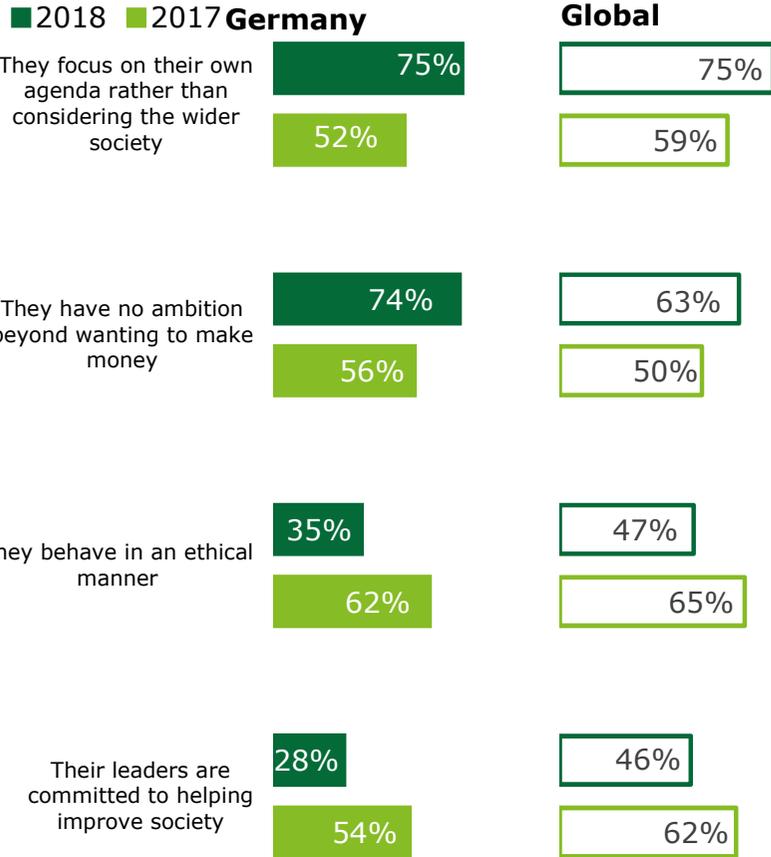
Top-five issues of greatest personal concern to millennials in Germany



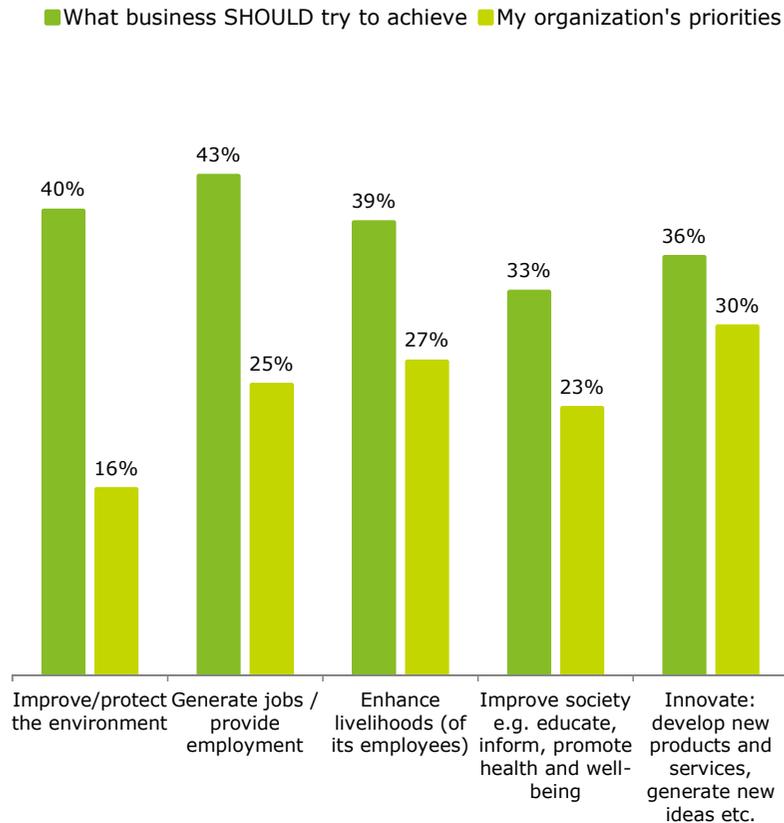
Q1. Do you expect the overall economic situation in your country to improve, worsen or stay the same over the next 12 months?
 Q2. Do you expect the overall social/political situation in your country to improve, worsen or stay the same over the next 12 months?
 Q3A/B. How do you feel about the future? Compared to your parents do you think you will be financially/materially better off/happier?
 Q4. Thinking about the challenges facing societies around the world, which three of the following issues are you personally most concerned about?
 Base: Germany 337, Global 10,455, Western Europe 3,035

Germany behavior, priorities and impact of business

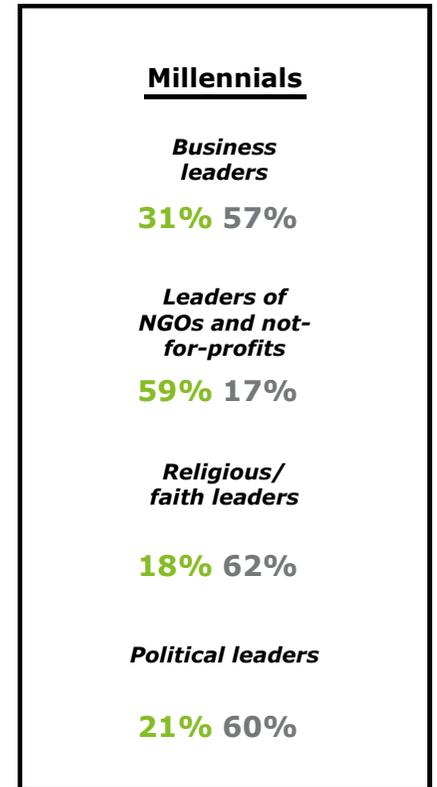
Percent of millennials who agree with the following statements about business' behaviour



Percent of millennials who say businesses... (showing top five "unmet" ambitions)



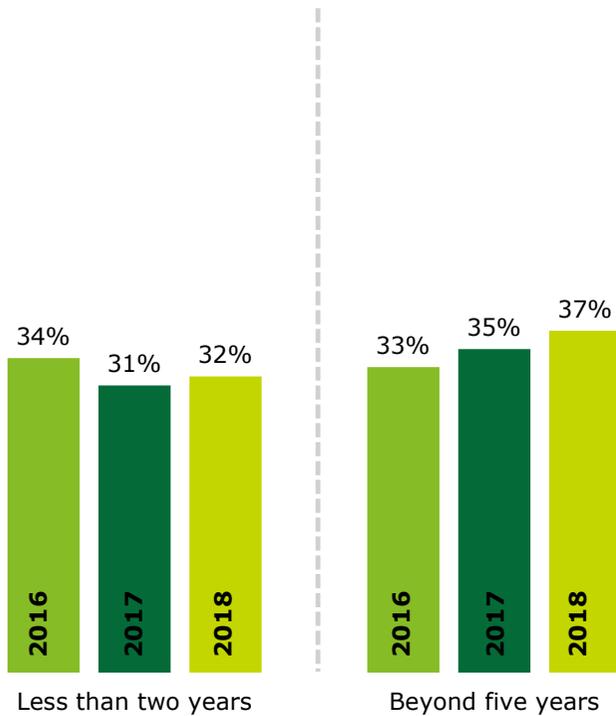
Percent of millennials who say the following groups are currently having a positive or negative impact upon society



Q12. Thinking about businesses around the world, would you agree or disagree that the following statements describe their current behaviour? Q11a. Which of the following words and phrases match your own belief as to what business should try to achieve? Select up to three. Q11b. And what would you say are the main priorities pursued by the organization you currently work for? Select up to three. Q6. Do you think the following groups are currently having a positive or negative impact on you and the world in which you live? Base: Germany 337, Global 2018 / 2017 10,455 / 7,900

Germany loyalty, turnover and the gig economy

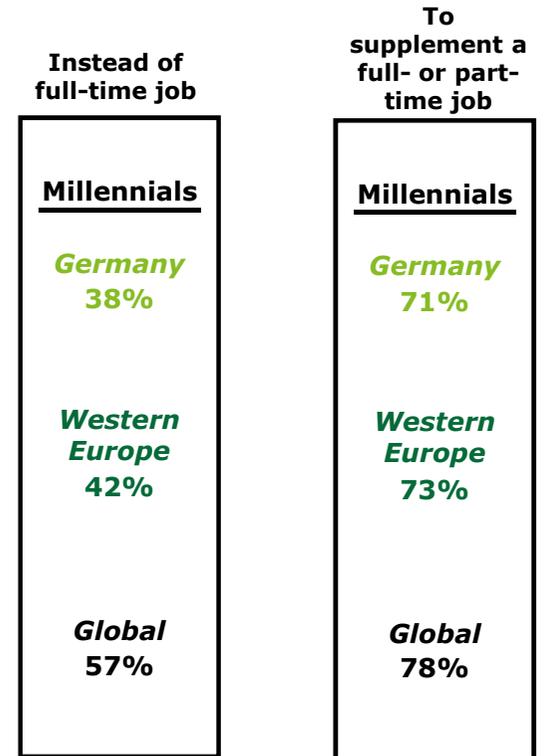
Percent who expect to stay with their current employers for...



What is important when choosing an employer?



Millennials already joining or considering the gig economy...



Germany perceptions of business leaders where organizations and their senior management teams (SMT) are diverse

% of millennials who work for diverse organizations, or have diverse senior management teams (SMT)...

% of millennials saying business leaders are making a positive impact on the world in which they live



Germany millennials
31%

Germany millennials in diverse organizations
34%

Germany millennials in organizations with diverse SMTs
37%

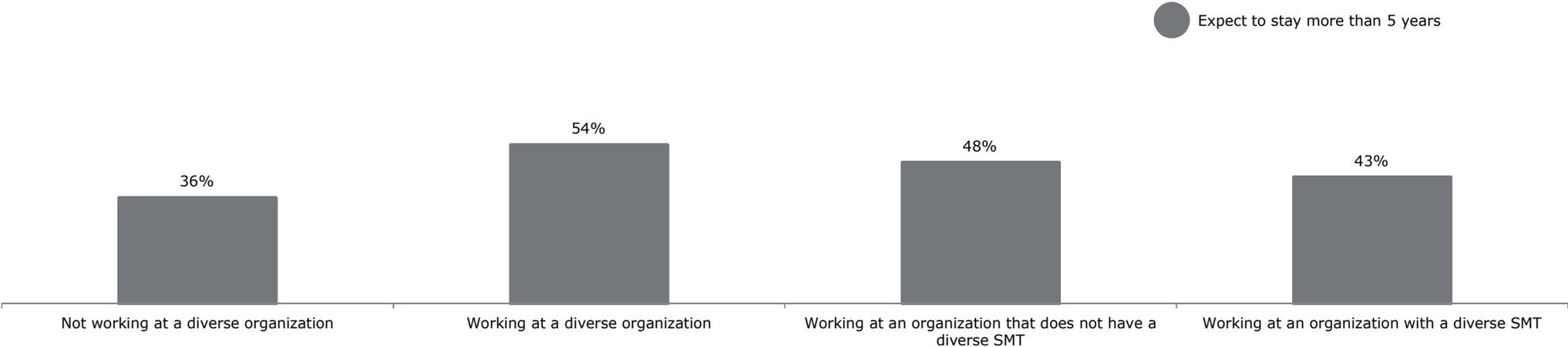
Q43. As regards the extent to which it reflects the wider society in which it operates, how would you describe the current level of diversity in... Your organisation's establishments in the Germany / Your organisation's senior leadership team?

Q6. Do you think the following groups are currently having a positive or negative impact on you and the world in which you live?

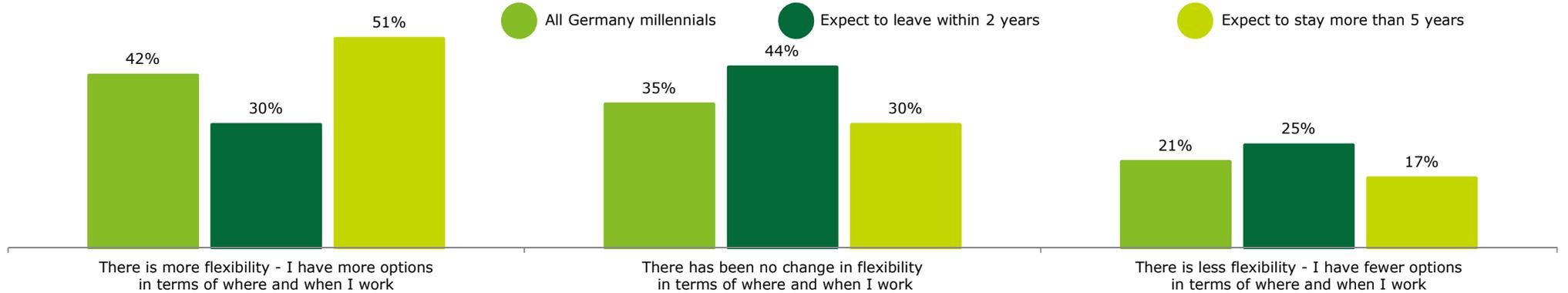
Base: All Germany Millennials 337, Millennials in Diverse Organisations 171, Millennials in Organisations with a Diverse SMT 120, Global 10,455, Western Europe 3,035

Diversity, flexibility and millennials' loyalty in Germany

Percent of millennials who expect to stay with their employer for more than 5 years...



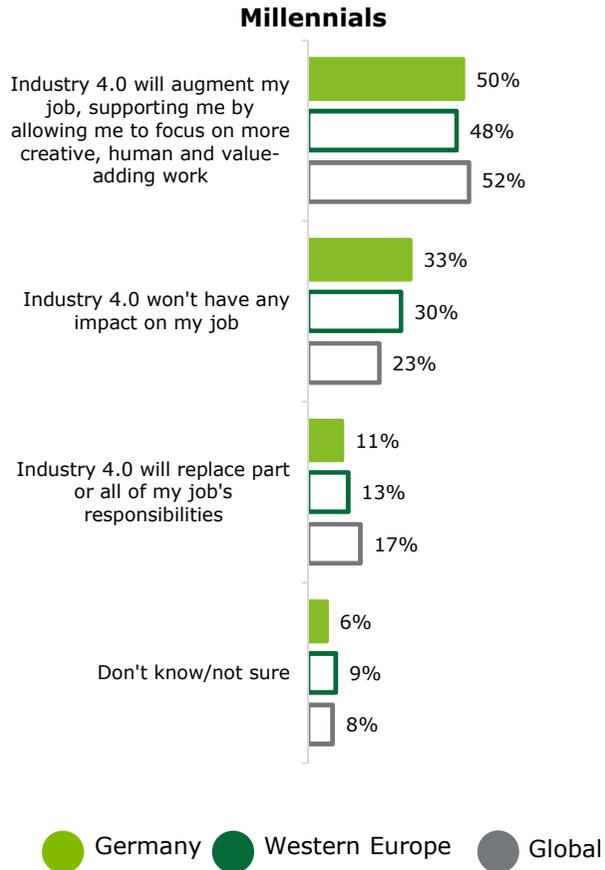
Percent of millennials who say that in the past three years...



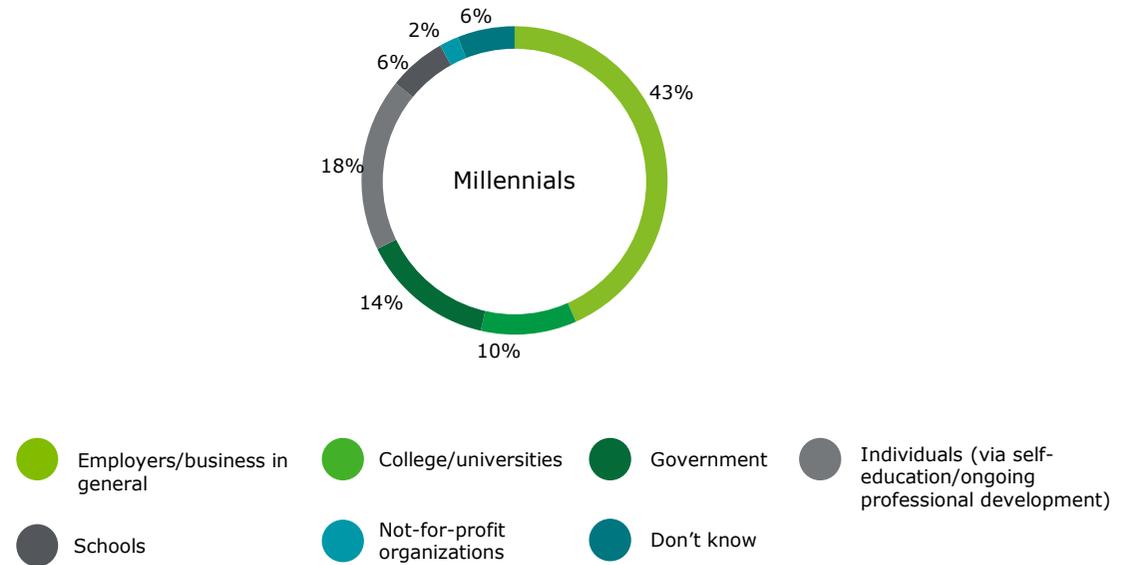
Q43. As regards the extent to which it reflects the wider society in which it operates, how would you describe the current level of diversity in... Your organization's establishments in the Germany / Your organization's senior leadership team? Q16. Thinking of the past three years, which of the following statements best reflects your experience of working at your current organization? 7
 Base: All Germany Millennials 337, Expecting to stay more than 5 years 125, Millennials who have worked in the same organization for over two years: All 199, Expect to leave within 2 years 51, Expect to stay more than 5 years 89

Industry 4.0: Impact and development

Percent of millennials who agree with the following statements about the **impact of Industry 4.0**



Percent of Germany millennials saying these groups are **most responsible** for preparing workers for Industry 4.0



37% of millennials in Germany say their employers are helping to prepare them for Industry 4.0...

...compared with **36%** globally

Q32. What impact, if any, do you think Industry 4.0 might have on your job? Q34b. Who should be most responsible for preparing workers for the changes that will result from Industry 4.0? Q35. Is your organization helping you understand and prepare for the changes of Industry 4.0? Base: Germany 337, Western Europe 3,035, Globally 10,455



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