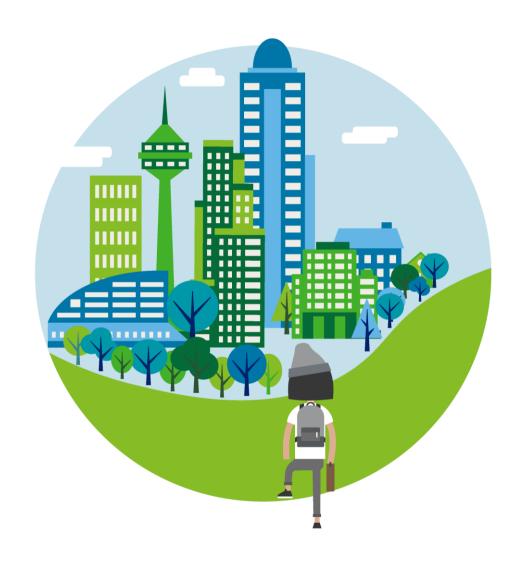
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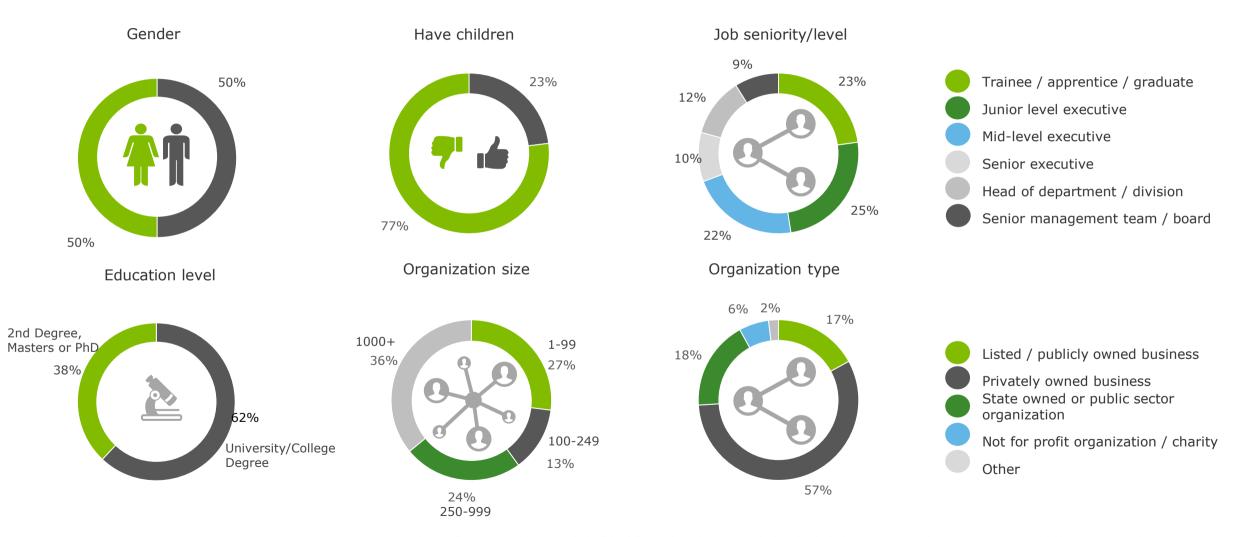


2017 Millennial Survey

Germany January 2017

Background

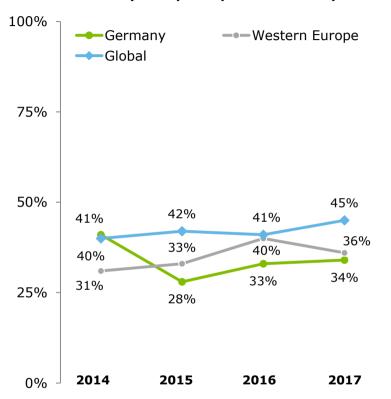
300 interviews achieved in Germany



C2. Please tell me your gender. S2. Which of the following best describes the highest level of education you completed? S3. Do you have children? S5. In total how many employees are there in your company/organisation? S6. Which of the following best describes the ownership of the organisation you work for? S8. Which of the following best describes your level of seniority where you work? Base: Germany 300

Economic, political and social outlook

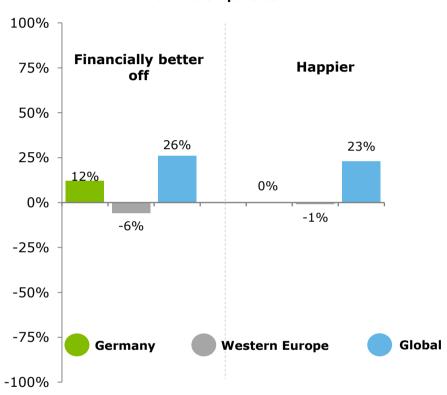
% expect the overall economic situation in their country to improve (next 12 months)



% expect the overall social/political situation in their country to improve (next 12 months)



% balance expecting to be better off / happier than their parents



Top 5 issues of greatest personal concern to Millennials in Germany

42%

29%

29%

21%

21%

Terrorism

Wars/conflicts between countries

Immigration / displaced populations

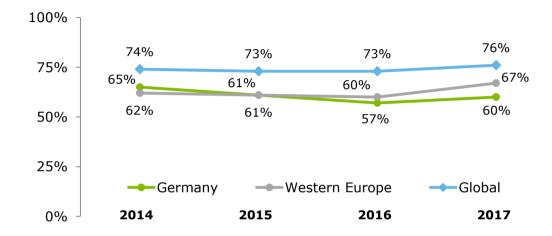
Crime/personal safety

Political instability/ tension

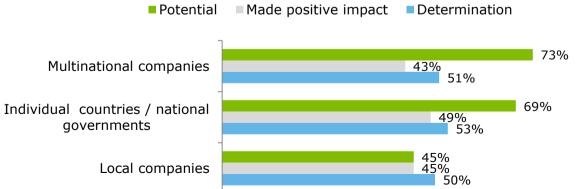
Q5. Taking everything into account do you expect the overall economic situation in Germany to improve, worsen or stay the same over the next 12 months? Q6. Taking everything into account do you expect the overall social/political situation in Germany to improve, worsen or stay the same over the next 12 months? Q7. Thinking about the world in general how do you feel about the future? Compared to your parents do you think you will be Financially/materially better off/Happier? Q8. Thinking about the challenges facing societies around the world (including your own), which three of the following issues are you personally most concerned about? Base: Germany: 300; Global 7900; Western Europe 2400

Role & Impact of Business

% say businesses have a positive impact on the wider society in which they operate



% who feel businesses and governments have ... to solve the challenges of greatest concern to Millennials



% who would approve political and business leaders thinking and speaking in the following ways



Q1. Thinking about businesses in general around the world, what impact do you think they are having on the wider society in which they operate? Q9. Thinking about the challenges of greatest concern to you, do you feel the following institutions / groups of people have (potential/determination/had a positive impact to solve these challenges? Q12. In general do you approve or disapprove of political leaders thinking and speaking in the following ways/would you approve or disapprove if business leaders started to think and speak in the following ways? Base: Germany: 300; Global 7900; Western Europe 2400

The ripple effect

% have great deal/fair amount of accountability and influence upon the following:



49%

...of Millennials in Germany feel 'enabled to contribute to charities/good causes at work'

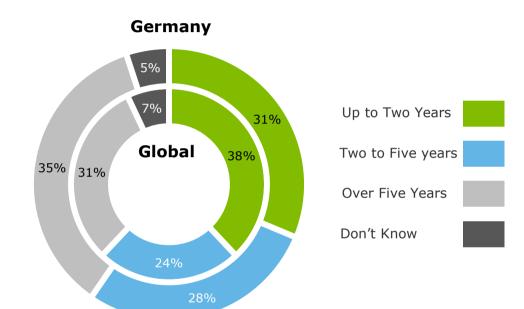


...compared with 54% globally

Q18. Has your organisation enabled you to support or contribute to charities/'good causes' while at work? Q21. To what extent do you feel you have an influence on the following activities/issues? Q24. How much accountability do you take for the following? By accountability we mean the level of personal responsibility you feel you have for ensuring they happen to the highest possible standard. Base: Germany: 300; Global 7900

Stability and loyalty

% who will stay with their current employer for ...



Change on 2016	Global	Germany
Up to two years	-6%	-3%
Over five years	+4%	+2%

% who would prefer full time vs freelance employment...

75% 65%

Germany

Global

...of Millennials would prefer full time/permanent employment

22% 31%

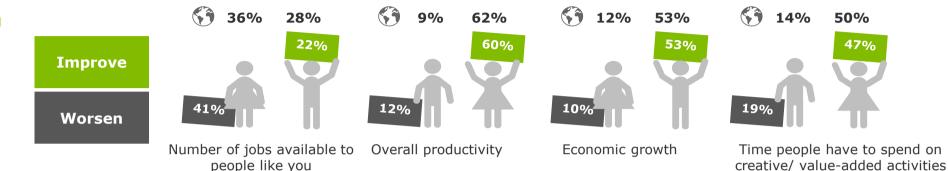
Germany

Global

...of Millennials would prefer freelance/consultative employment

Automation and flexibility

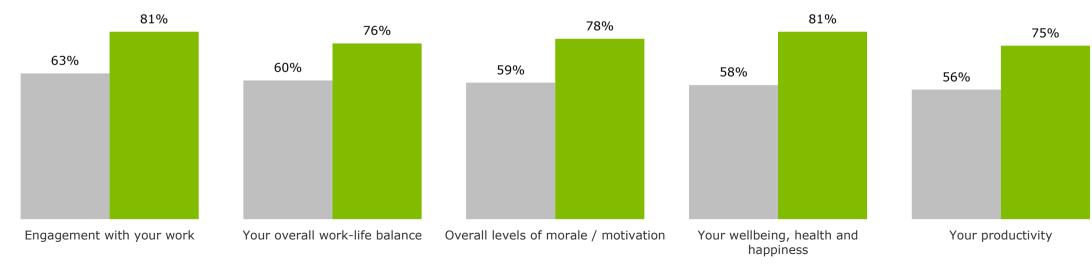
% who feel automation/ robotics/ artificial intelligence will improve/ worsen the following



% say that flexible working practices have had a positive impact upon the following (top 5 areas of positive impact in Germany)

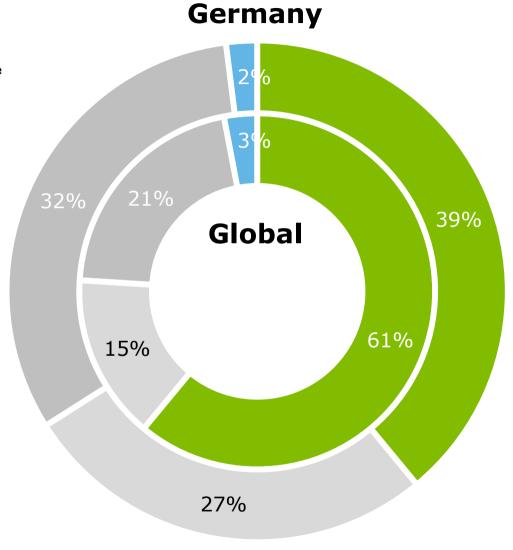
Those with flexible working provision in Germany

Those with high provision of flexible working in Germany



Generation Z

% think those aged 18 or younger will have the following impact as their presence in the workplace increases





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