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THE LARGEST CANADIAN-OWNED POLLING, MARKET RESEARCH AND ANALYTICS FIRM

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#YOUTH STUDY

CREATED BY Leger

BEING A YOUNG PERSON IN 2022

SUMMARY

This is the fourth edition of Leger's Youth Study. This annual study helps organizations reflect upon and refine their relationships with the younger generations. Based on a survey of **3,515 Canadians and Americans between the ages of 15 and 39**, the *Youth Study* profiles the two younger generations, Generation Z and millennials. Through three sections, **citizenship**, **work** and **consumer behaviour**, this edition of the Youth Study aims to provide answers to the question, *what does it mean to be a young person in 2022*?

Young Canadian citizens are expressing real fears about the future. *Without hope for their collective and individual future, they are, in their eyes, sacrificed generations. They fear a real social decline, and do not rely on traditional institutions to improve their situation.*

Young Canadian workers are aware of the economic context. *The labour shortage has reversed the balance of power between employees and employers.*
The younger generations have taken note, and overwhelmingly feel that their employers are more dependent on their work than the other way around. Believing that they can set their own working conditions, they ask their employers for flexibility first and foremost.

Flexibility is the most important factor in hiring and retaining young employees.

Young Canadian consumers are demanding and want to make purchases efficiently. *The younger generations are highly informed, know the market and consult reviews and critiques of companies. Moreover, whether they buy online or in-store, efficiency drives their consumer choices.*

In this fourth edition of the Youth Study, you will find key insights about the makeup of the two younger generations. Year after year, the Youth Study is a voice for their concerns and values. Listen carefully, we hope you enjoy reading it!

METHODOLOGY

3,015
millennials and members of Generation Z
surveyed across Canada

2,007
millennials

1,008
members of Generation Z

MOTHER TONGUE		VISIBLE MINORITY		RELIGION		LGBTQ2S+	
20%	French	**25%**	Yes	**43%**	Yes	**16%**	Yes
64%	English	**70%**	No	**52%**	No	**77%**	No
16%	Other						

Leger survey conducted from October 19 to November 10, 2021.

The complement to 100% corresponds to the response "I don't know/I prefer not to answer"

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CITIZENSHIP

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THE FUTURE CRISIS

The situation is getting worse every year. The younger generations, whether they are Generation Z or millennials, are lacking confidence in the future. After a difficult 2021, members of the younger generations do not feel that 2022 will be any better. There are multiple consequences for organizations: disengagement with companies, weaker loyalty, fragile mental health and definitive breaks in their life trajectories.

CITIZENSHIP

In general, how do you think (...) will change in the next year?

66%

do not believe that the economic situation will improve in 2022

2020: 66%

77%

do not believe that the political and social situation will improve in 2022

2020: 70%↓

79%

do not believe that the environmental situation will improve in 2022

2020: 75%↓

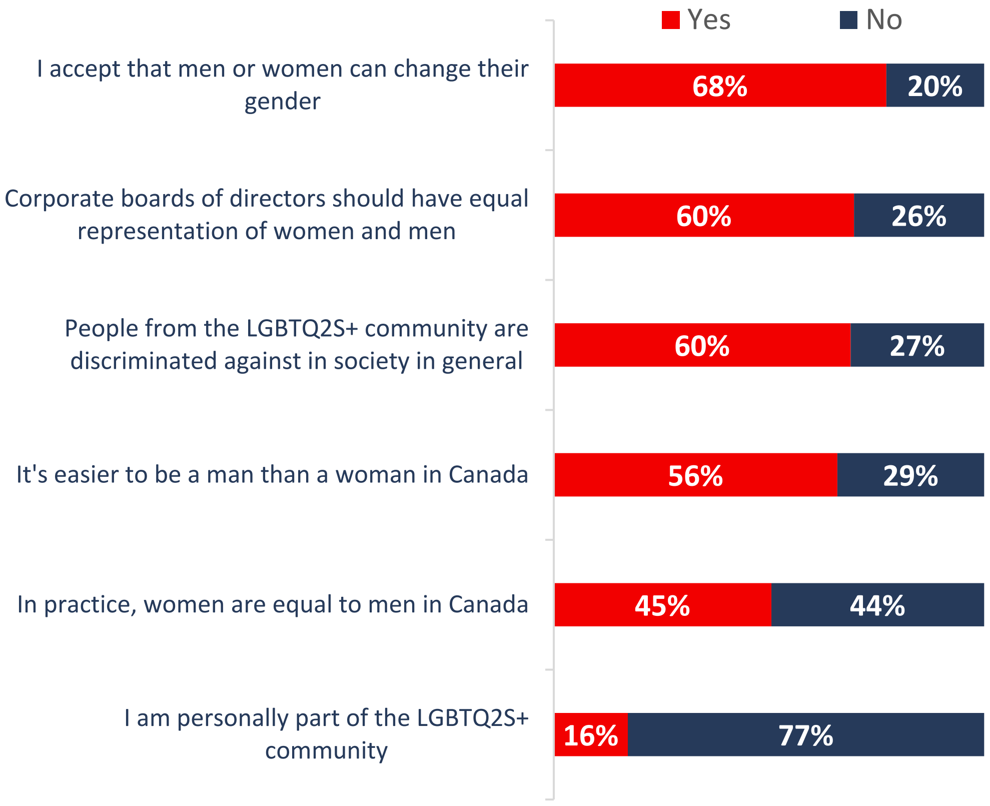
A little better regarding their personal finances, but still lacking confidence.

38% of Gen Zers and millennials believe their personal finances will improve in the next year, compared to 55% who do not. Millennials aged 30-40 are more likely to be pessimistic about their personal economic situation.

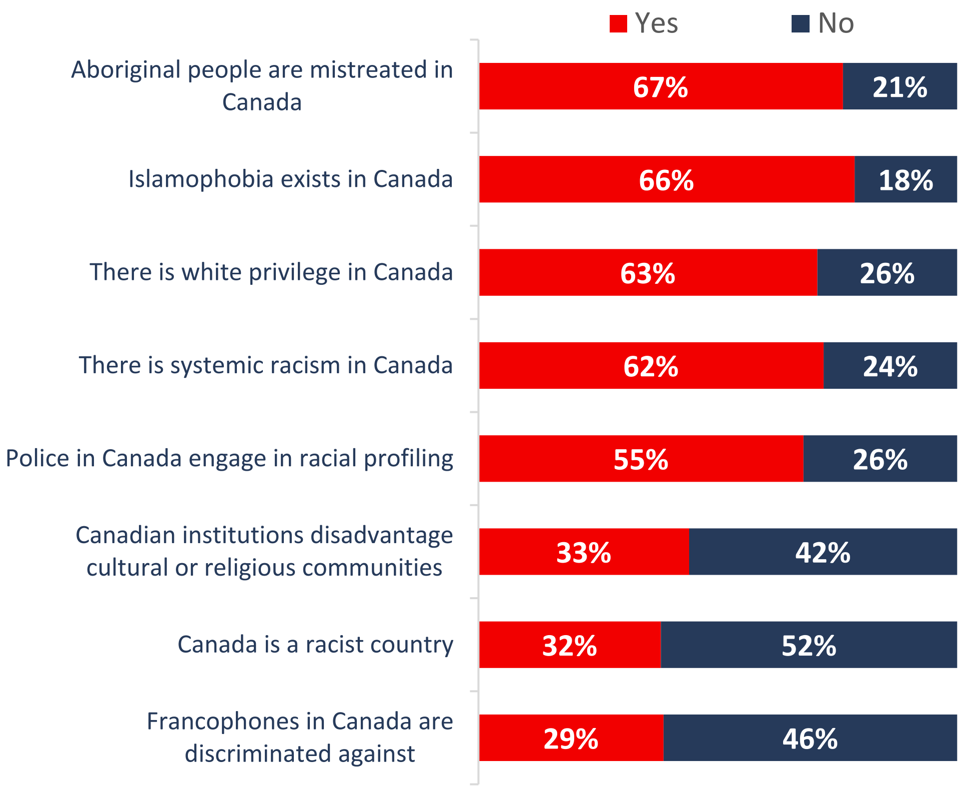
Base: All respondents (n=3,015)
In the results of the last study *(2020)*, an arrow pointing up (↑) indicates a significantly higher proportion than this year. Conversely, an arrow pointing down (↓) indicates a significantly lower proportion than this year. No arrow means that the proportions are statistically identical.

CITIZENSHIP

GENDER EQUALITY



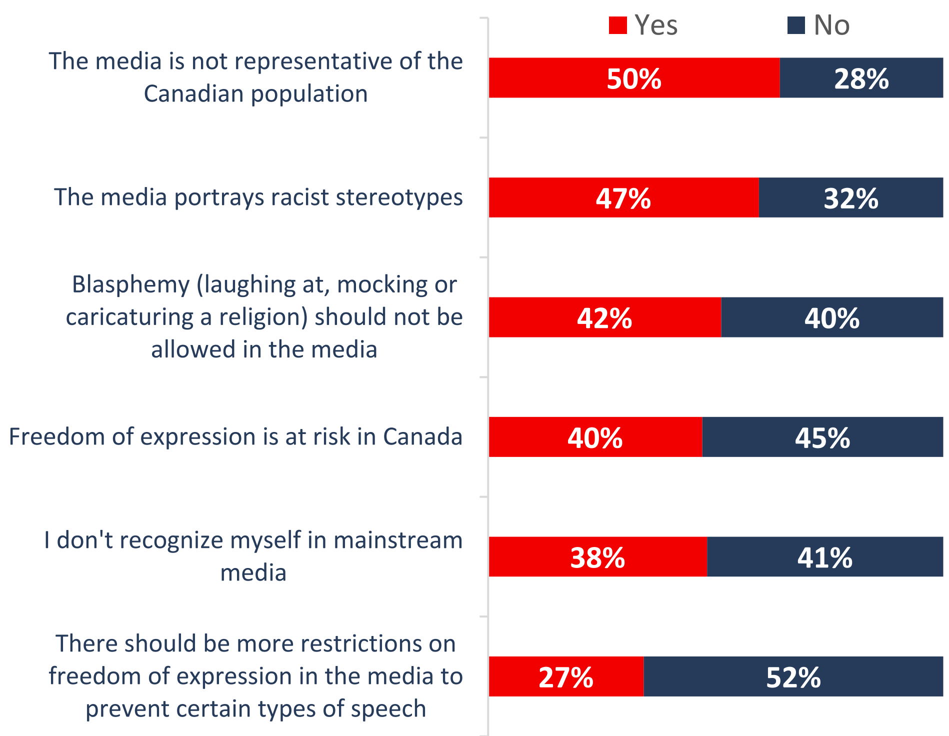
LIVING TOGETHER



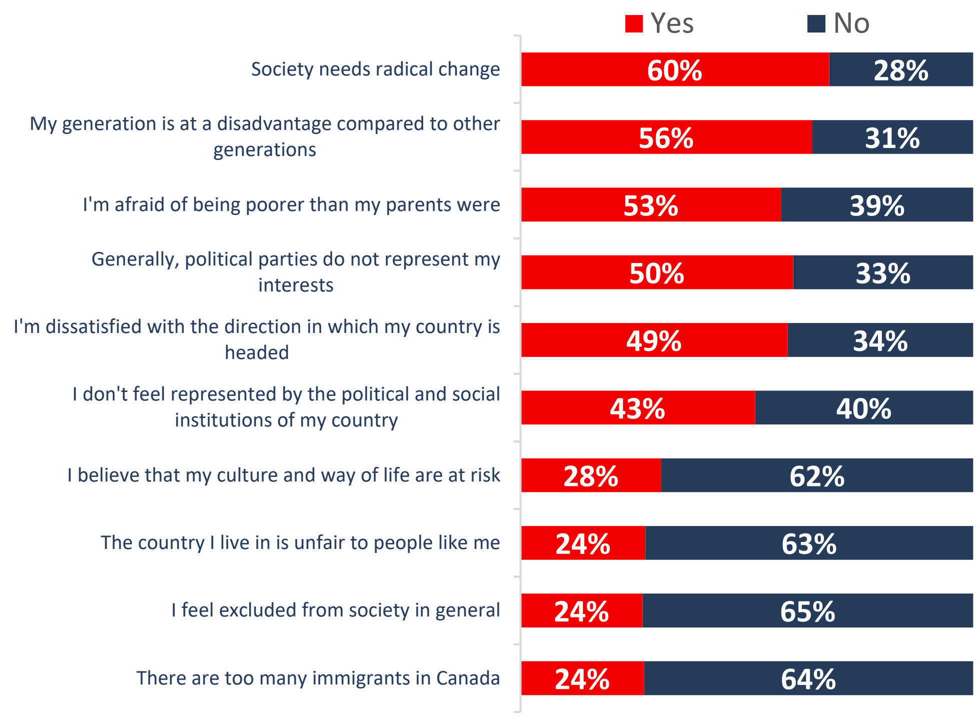
Base: Respondents aged 18 and older (n=2,910)
The complement to 100% corresponds to the response "I don't know/I prefer not to answer"

CITIZENSHIP

MEDIA PORTRAYAL



INTERGENERATIONAL EQUALITY



On issues related to gender, living together, media representation and generational issues, members of the younger generations, often described as "woke", are relatively unanimous: they believe that society and its institutions are discriminatory regarding ethnocultural affiliation and gender, disadvantage the younger generations and are not representative of their reality.

Base: Respondents aged 18 years and older (n=2,910)
The complement to 100% corresponds to the response "I don't know/I prefer not to answer"

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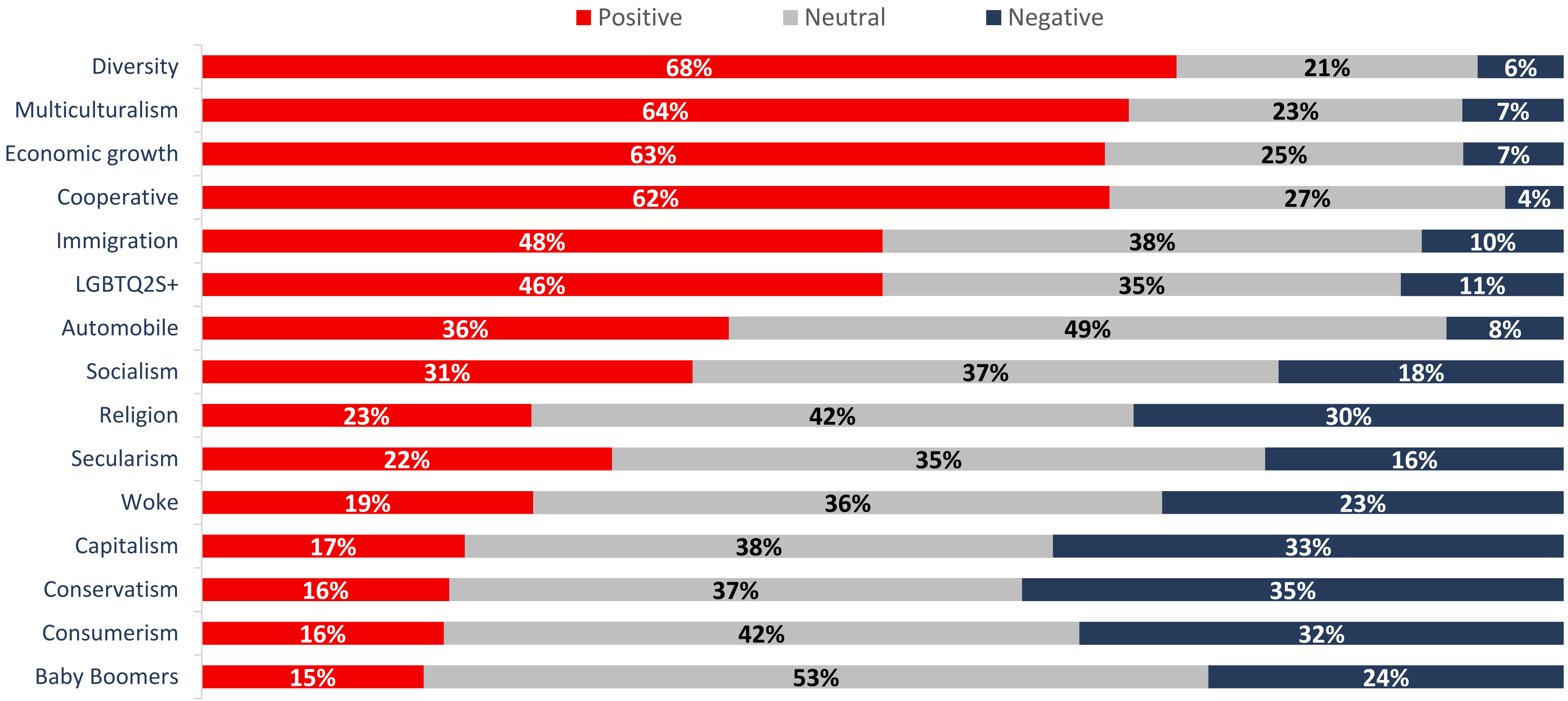
CITIZENSHIP

Perceptions of Concepts

"Do you perceive the following words as positive, neutral or negative?"



Base: All respondents (n=3,015)
The complement to 100% corresponds to the response "I don't know/I prefer not to answer"

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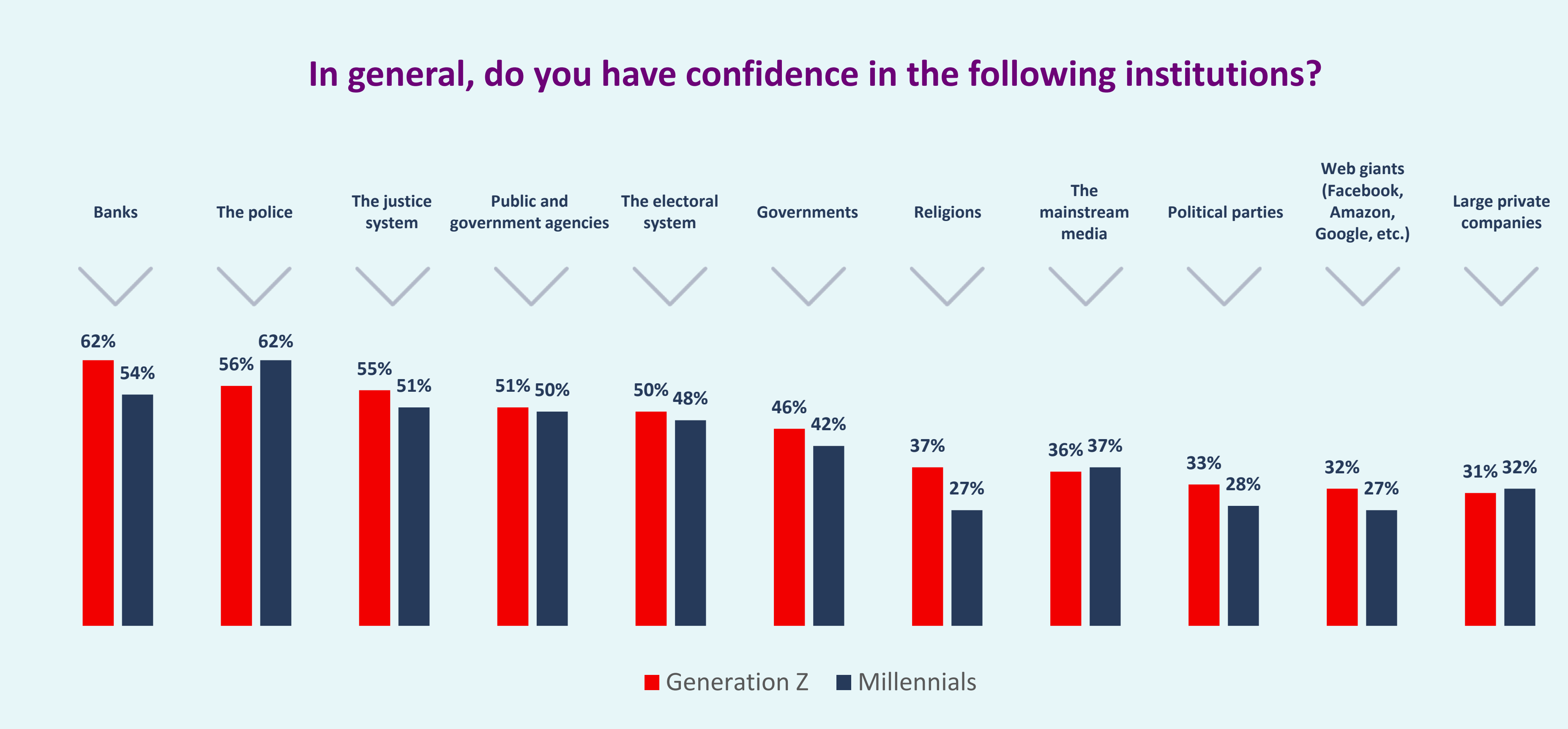
CITIZENSHIP

Trust in Institutions

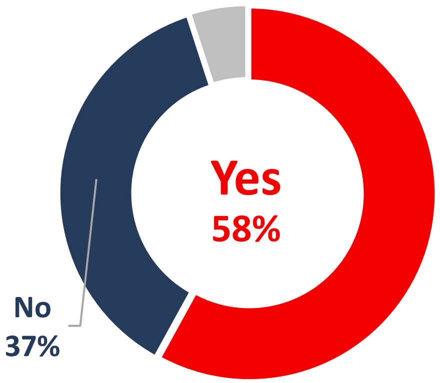


Base: All respondents (n=3,015)
*% "Complete confidence" + "Some confidence" is presented for each generation

CITIZENSHIP

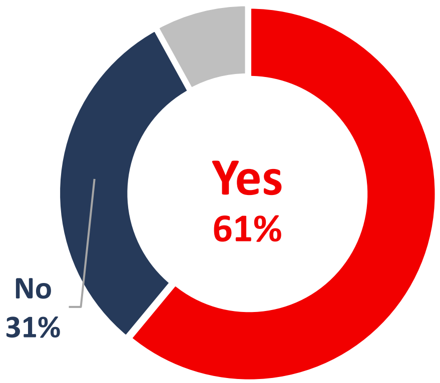
Eco-Anxiety

Are you stressed by climate change?



Eco-anxiety seems to be a growing phenomenon, especially among Generation Z **(63%)** compared to millennials **(54%)**. In addition, young Quebecers are significantly more stressed about climate change **(65%)** than young people elsewhere in Canada **(56%)**. Women **(65%)** and members of the LGBTQ2S+ community **(75%)** are also more stressed.

Do you think you will personally suffer from the consequences of climate change?



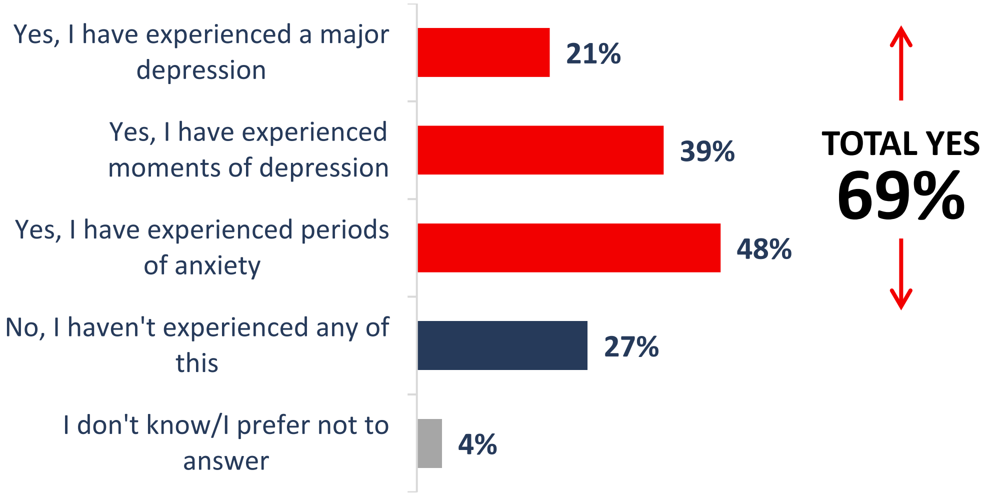
Women (**67%**) and members of Generation Z (**66%**) are more concerned about personally suffering from climate change.

Base: All respondents (n=3,015)

CITIZENSHIP

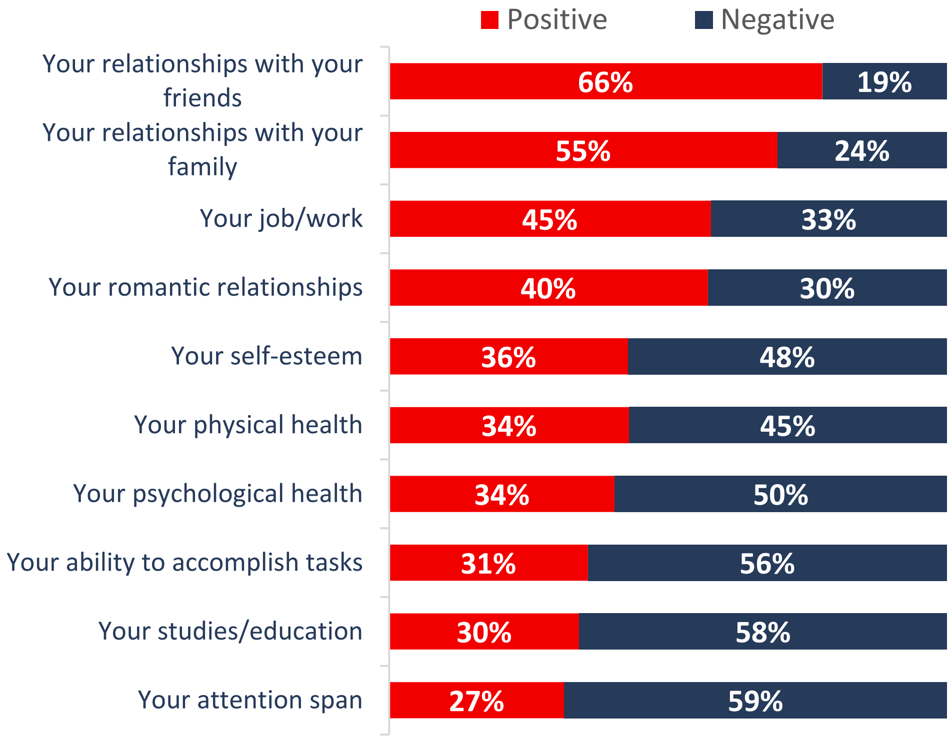
Mental Health

Have you ever experienced major depression, moments of depression or periods of anxiety?



Women are more likely to suffer from mental health difficulties (**77%**). More specifically, **58%** of women admit to having experienced anxiety, compared to **38%** of men. In addition, Gen Zers and millennials are more likely to have experienced mental health difficulties between the ages of 20 and 29.

For you personally, does social media have a positive or negative impact on the following?



Base: All respondents (n=3,015)

STRATEGIC ADVICE FOR COMPANIES

THE FUTURE CRISIS: HELP THEM FIND MEANING IN THEIR WORK

#1

Members of Generation Z and millennials lack confidence in the future and fear social decline. They feel that they are, in their own words, a sacrificed generation.

Organizations cannot completely restore the younger generations' confidence in the future, but they can help. Zs and millennials admit to searching for meaning in their lives, and hope that their professional lives can fulfill them.

COMMUNICATE THAT YOU ARE AN AGENT OF CHANGE

#2

They distrust most traditional institutions, starting with big business, the government and the mainstream media. They do not feel that institutions are agents of change.

The dynamics of interaction between younger generations and traditional institutions have changed. It is no longer up to them to come to the organizations; it is up to the organizations to encourage them to join them. The latter must make them understand that change must come through the more traditional structures.

FEELING ANXIOUS, YOUNG CITIZENS NEED ORGANIZATIONS TO LISTEN TO THEM

#3

Year after year, the observation remains: the majority of Generation Z and millennials, especially women between the ages of 20 and 29, have already experienced moments of anxiety or depression. The proportions continue to rise.

Organizations need to understand their role in this state of affairs. They need to think about how to interact with the younger generations, whether as employees or customers.

#2

WORK

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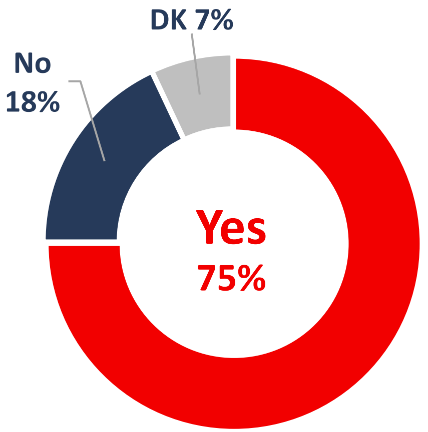
WORK

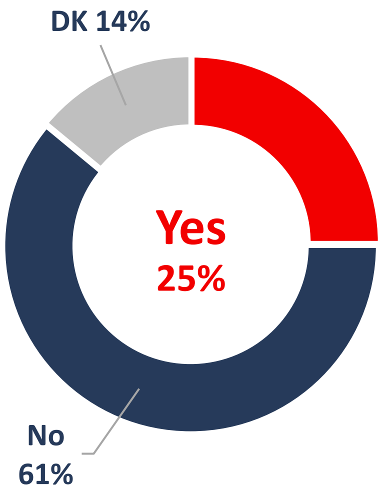
More than half of young people (56%) who do not like their job intend to leave it in the next year

Do you like your current job?



75% of young workers like their jobs, but that doesn't necessarily mean that those who say they don't like their jobs want to leave. Among those who want to leave their job, **52%** say they still enjoy it. Those who have experienced mental health difficulties are significantly less likely to enjoy their jobs.

Do you intend to leave your job in the next year?



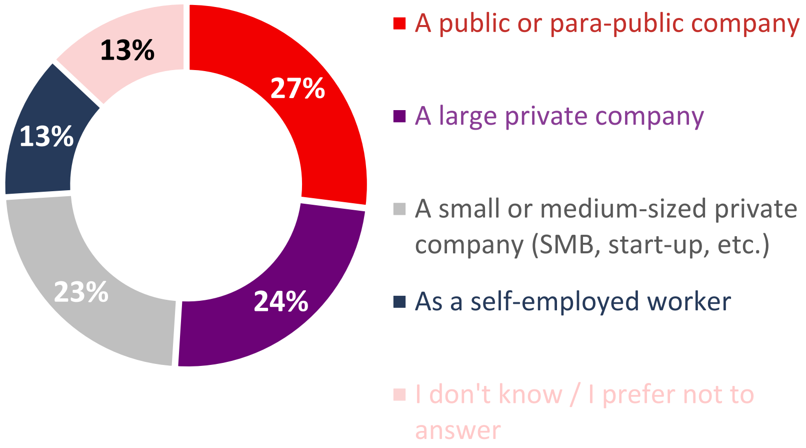
25% of workers under age 40 say they want to leave their current job in the next year, which is more than in previous years due to labour shortages. From the age of 30 onwards, workers stabilize. Between the ages of 20 and 29, the proportion of workers wanting to leave their jobs increases to **30%** and then drops to **20%** from the age of 30.

Base: Workers (n=2,251)

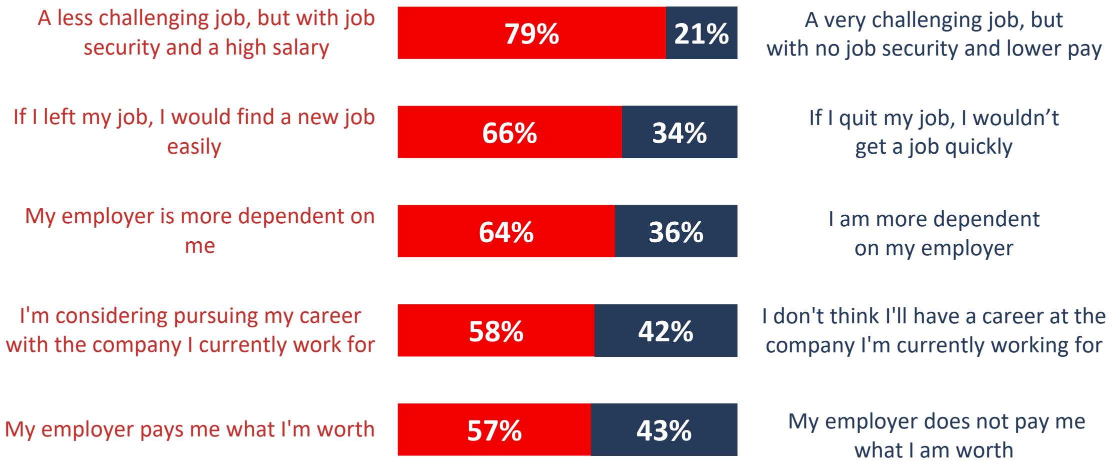
WORK

Job Preferences

Regardless of your current job, in which type of company would you most like to work?



Which of these two options would you prefer for a job?



Young workers feel a certain independence from their employers. **66%** believe they could find a new job if they had to leave in the short term, and **64%** say their employer depends on them more than the other way around. Young workers are aware of the favourable labour market environment and do not hesitate to impose their terms on employment.

Base: College and university students and workers (n=2,607)

Base: Workers (n=2,251)

1

2

3

WORK

Benefits Sought by Young Employees

What are the four most enticing benefits companies can offer their employees?

Other benefits that young people find attractive are the option of working from home (**27%**), an accessible and appealing workplace (**17%**) and the opportunity to advance quickly within the company (**15%**) .

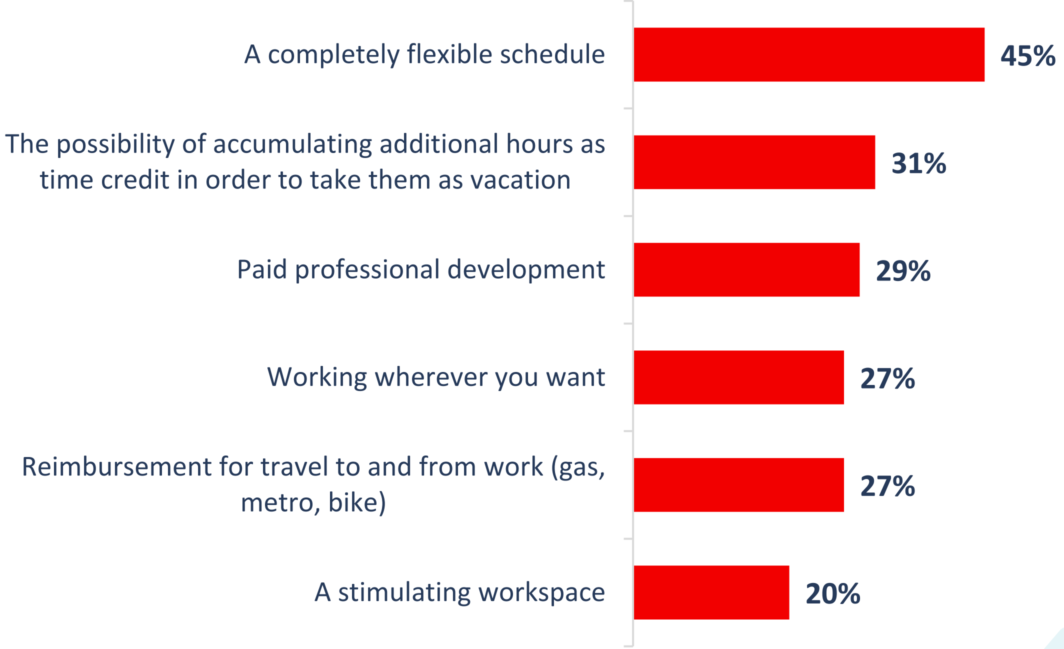
Other factors mentioned in order of importance are a company that represents my values (**10%**), a prestigious company with a good reputation (**5%**), good technological tools (**5%**), a flat and flexible hierarchy (**4%**) and the opportunity to work abroad (**4%**).

While good pay and job security are universal benefits that most members of the younger generations hope for, it appears that the third most important factor is flexibility. Zs and millennials expect flexibility in both their geographic location (telecommuting) and their schedule.

Base: College and university students and workers (n=2,607)

WORK

Incentives Sought by Young Employees



Other incentives considered attractive to young people are assistance in paying off their student debt (**17%**), the ability to take time off without pay (**16%**) and having a network of mentors to help them improve their work (**14%**).

Other incentives mentioned in order of importance were: a budget for physical activities (**12%**), time available to work on projects other than their primary duties (**11%**), social activities outside of work hours (**9%**), a budget for social activities (**8%**) and sharing hours with other employees to work less (**6%**).

Flexibility is also one of the most attractive incentives an organization can offer these young workers, whether through remote work or a completely flexible schedule. Next in line is paid developmental training—as well as a network of mentors—and reimbursement for work-related activities, from travel to reimbursement of student debt.

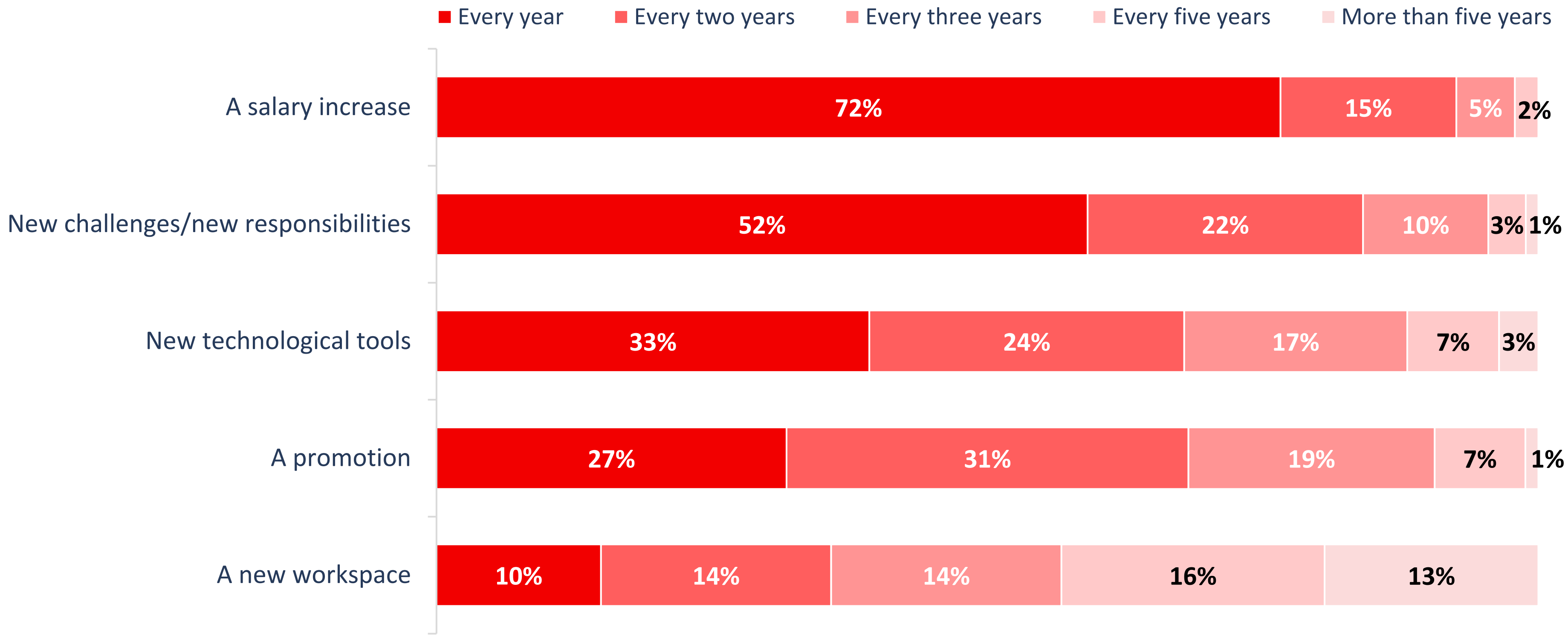
"What are the three most attractive incentives that companies can offer their employees?"

Base: College and university students and workers (n=2,607)

WORK

Frequency of Receiving Benefits and Incentives

How often do you think a company should offer you…?



Base: College and university students and workers (n=2,607)
The complement to 100% corresponds to the response "I don't know/I prefer not to answer"

STRATEGIC ADVICE FOR COMPANIES

LABOUR SHORTAGE: YOUNG WORKERS ARE AWARE OF THEIR VALUE

#1

Young workers feel independent from their employers. 66% believe they would find a new job fairly easily if they had to leave their current job. 64% add that their employer is more dependent on them than the other way around. They understand that they have a better bargaining position with companies.

Organizations must take into account the independence and low loyalty of their young workers. If organizations lag behind in offering working conditions sought after by their young employees, these employees will quickly leave for the competition.

YOUNG WORKERS WANT A MORE FLEXIBLE COMPANY WITH MORE FREEDOM

#2

Flexibility in terms of hours worked and the possibility of telecommuting are at the heart of the younger generations' hiring requirements. This is a situation that will persist over the coming years.

If you don't offer flexibility in all aspects of work, young workers will look for alternatives or be dissatisfied with their working conditions. In short, young employees want a company that is free of constraints.

AN EVER-GROWING NUMBER ARE THINKING OF LEAVING THEIR COMPANY

#3

Gen Zers and millennials are increasingly looking to quit their jobs—and it's not just those who don't like their jobs who want to leave.

Young workers are constantly being courted by organizations. Regardless of income, industry or the type of company they work for, the competition among organizations to attract and retain young talent is unparalleled.

#3

CONSUMER BEHAVIOUR

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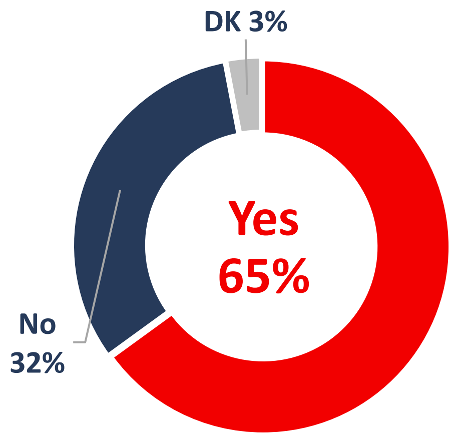
CONSUMER BEHAVIOUR

In-Store Purchases

In the past week, have you gone to the store to purchase a product or service?



In-store shopping is here to stay. It is even more popular than online shopping for members of the younger generation. The main reason for its popularity is its efficiency, i.e., the possibility of getting a product instantly and ensuring its quality.

Why did you make this purchase at the store?

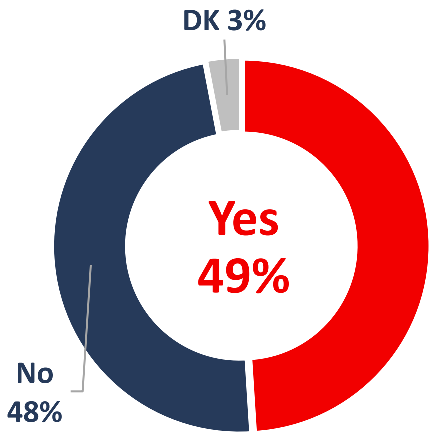
Base: All respondents (n=3,015)

Base: Respondents who made an in-store purchase in the past week (n=2,010)

CONSUMER BEHAVIOUR

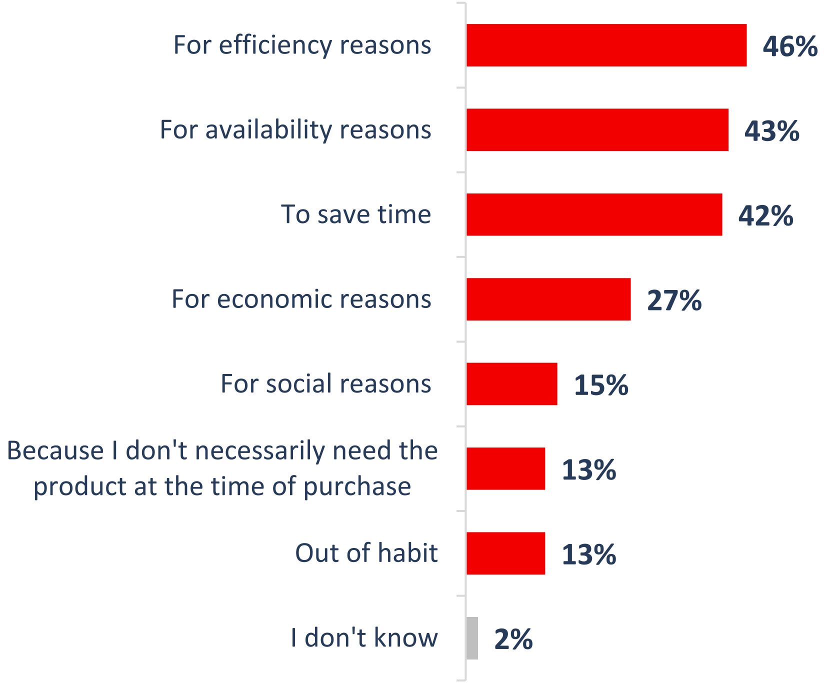
Online Purchases

In the past week, have you purchased a product or service online?



Young consumers shop online for the same reasons they shop in stores—for efficiency. If the product is available online and they don't need to use it immediately, it may be more effective for young consumers to turn to online shopping. Young consumers have a message for organizations: when they buy from you, they want efficiency.

Why did you make this purchase online?



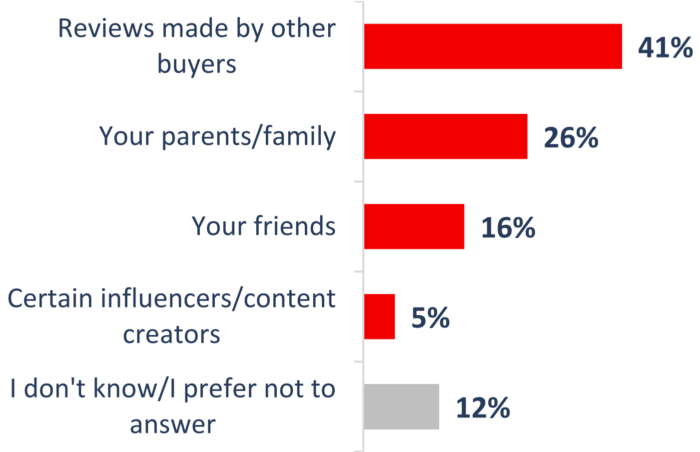
Base: All respondents (n=3,015)

Base: Respondents who purchased online in the past week (n=1,553)

CONSUMER BEHAVIOUR

Influences and Considerations when Purchasing

Who do you refer to when you make an important purchase?



First, young consumers refer to the reviews left by other buyers, especially for purchases that might be considered minor. Second, their family and friends can guide them with respect to their purchasing decisions, especially regarding substantial expenses, such as buying a house or a car. In any case, it seems quite clear that organizations must rely on external influences to attract the younger generations to their products and services.

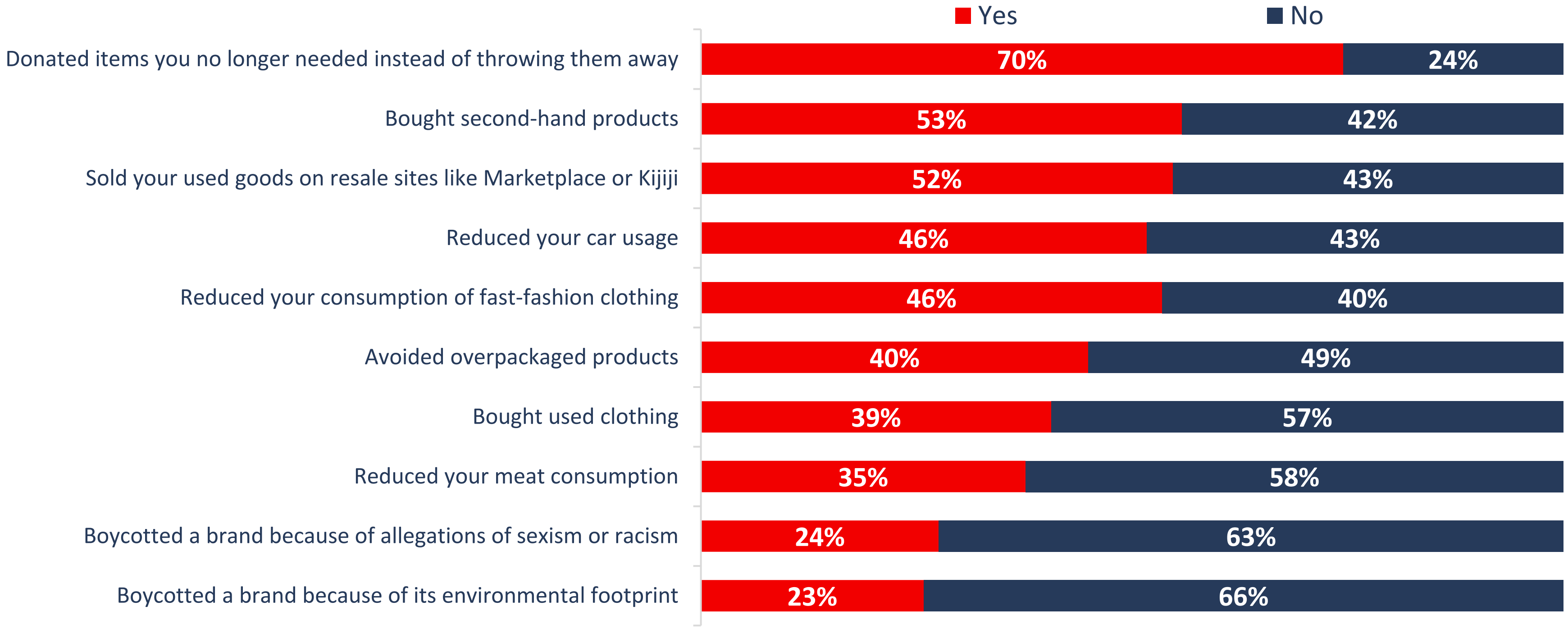
What is the main thing you consider when buying a product or service from a company?

Base: All respondents (n=3,015)

CONSUMER BEHAVIOUR

Behaviour Over the Last Year

In the past year, have you engaged in the following behaviours?



Base: All respondents (n=3,015)
The complement to 100% corresponds to the response "I don't know/I prefer not to answer"

ADVICE FOR COMPANIES

YOUNG CONSUMERS ARE INFORMED AND DEMANDING

#1

Young consumers are not naive. They know the market and read comments left by other buyers when making the majority of their purchases.

Organizations are losing some control over their reputation due to the reviews and advice found on external applications. They need to invest in these digital venues to ensure they maintain a strong consumer brand.

YOUNG CONSUMERS WANT EFFICIENCY

#2

Whether shopping online or in-store, the first criterion that young consumers consider is efficiency.

Organizations must understand that purchasing from home should be simple and efficient. If there are too many unnecessary interactions, barriers or too much time spent waiting, young consumers will find alternatives. They want simplicity, and they do not want to waste time.

YOUNG CONSUMERS WILL MAKE THEIR DISSATISFACTION KNOWN

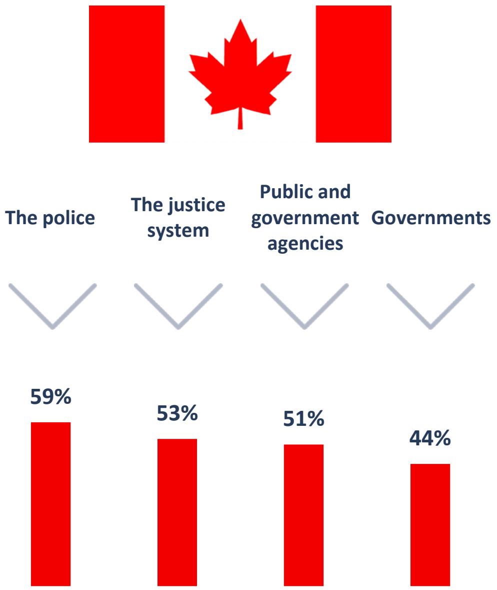
#3

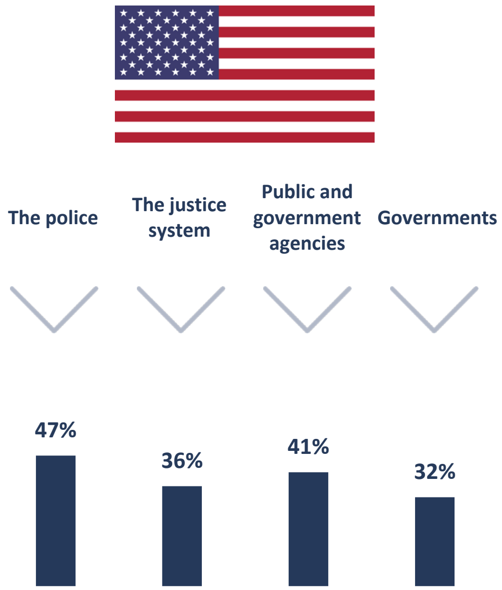
Young consumers are boycotting, voicing their discontent and incorporating their principles into their consumer behaviour. For example, 46% have reduced their consumption of fast-fashion clothing and 24% have boycotted a brand because of allegations of sexism or racism.

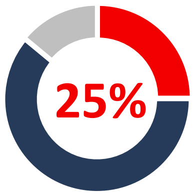
Young consumers are making their voices heard. If an organization has good environmental practices, they will be proud to purchase from it. Conversely, poor service or questionable practices can cost you a significant portion of your customer base.

Canada vs the United States

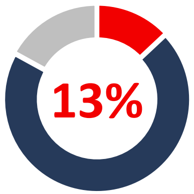
For comparison purposes, the Youth Study surveyed 501 Americans between the ages of 15 and 39 between October 19 and November 10, 2021. Many similarities can be observed between American and Canadian members of Generation Z and millennials. Young Americans appear to be more confident about their economic future, less likely to want to quit their jobs in the next year, and more distrustful of certain institutions, including governments, the justice system, the police, and government agencies.







% of Generation Z and millennial workers who want to leave their jobs in the next year



49%

% of Gen Zers and millennials who shopped online in the past week

63%

DO YOU HAVE ANY COMMENTS, QUESTIONS, OR WOULD YOU LIKE THIS CONTENT TO BE PRESENTED TO YOUR ORGANIZATION?

CONTACT US