

Marketing to Gen Z - Canada - September 2019

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

Societal and cultural nuances have influenced Gen Z in such a way that they are not Millennials 2.0, and differ in their core values from older generations. The generation's more personal relationship with brands and mission-mindedness means they will hold brands to higher standards. While they are not currently primary household shoppers, they will be in just five to ten years and will bring their orientation to the world with them.

This report investigates the 18-24-year-old lifestage, the goals and stressors of Gen Z, how they most enjoy spending their time, their values, their relationship with brands and the impact tech is having on their preferences for interacting with others.

- The fundamental values of Gen Z differ – even from Millennials
- The future looks uncertain as Gen Z strive towards financial stability
- Gen Z shopping with their morals as they see brands representing who they are



"Like any other generation, Gen Z are a product of their times. However, unlike before, the pace of change has never been faster, influencing the mindset and core values of Gen Z to a degree which has never been seen before."

– Carol Wong-Li, Associate Director - Lifestyles & Leisure

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Table of Contents

OVERVIEW

- What you need to know
- Definitions

EXECUTIVE SUMMARY

- The issues
- The fundamental values of Gen Z differ – even from Millennials
- The future looks uncertain as Gen Z strive towards financial stability

Figure 1: Top five most important values Canadians should have, Gen Z vs Millennials vs older generations, June 2019

- Gen Z shopping with their morals as they see brands representing who they are
- Opportunities
- Inclusion and representation matter as the generation is diverse on multiple levels
- Gen Z women: providing a sense of belonging in-person is a matter of mental wellness
- Big brands: build hobby-based communities to continue winning with Gen Z men

Figure 2: Stressors, Gen Z vs older generations, June 2019

Figure 3: 'The brands I use reinforce the image I want to portray' (% any agree), Gen Z vs older generations, June 2019

Figure 4: Ethnic makeup, Gen Z vs older generations, June 2019

Figure 5: Attitudes and impact of social media usage, Gen Z women vs Gen Z men, June 2019

Figure 6: Attitudes towards big brands, Gen Z men vs overall June 2019

- What it means

THE MARKET – WHAT YOU NEED TO KNOW

- Adult Gen Z comprise a tenth of the Canadian population
- Gen Z are the most ethnically diverse generation to date

MARKET FACTORS

- One in 10 Canadians are adult Gen Z
- Gen Z are the most ethnically diverse generation to date
- Immigration is the primary driver of population growth

Figure 7: Canadian population, by age group, 2018

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 8: Distribution of foreign-born population in Canada, by region of birth, 1871 to 2036

- **Gen Z are much more ethnically diverse than all older generations**

Figure 9: Self-identification of ethnicity, by generation, June 2019

- **More diversity means a different 'face' of 'mainstream Canada'**

Figure 10: "I am part of mainstream Canada" (% agree), by generation, January 2018

KEY PLAYERS – WHAT YOU NEED TO KNOW

- **Free and real content is winning**
- **Legacy brands hold weight with Gen Z men**
- **Commitment to values must run throughout the entire organization**
- **Traditional loyalty programs are missing the mark**
- **Remember, Gen Z are a product of their environment**

WHAT'S WORKING?

- **Free content is winning**
 - **YouTube ranked as a top three favourite brand for Gen Z**
 - **Streaming videos is a part of everyday life**
- Figure 11: Frequency of watching free videos, Gen Z vs older generations, January 2019
- **Speaking of content, let's get real**
 - **TikTok is taking off with Gen Z**
 - **Online video gaming is time worth spending**
- Figure 12: Attitudes towards gaming, Gen Z men vs overall, November 2018
- **Surprise! Big brands are winning with Gen Z and Millennial men**

Figure 13: Attitudes towards big brands, by age and gender, June 2019

- **Scaling down products to adapt to modern interests: spotlight on Bose**

Figure 14: Bose, March 2018

- **Modernizing offerings to adapt to modern interests: spotlight on Garmin**

Figure 15: Introducing the fenix 6 series, August 2019

WHAT'S NOT WORKING?

- **Woke washing – values/ethics must cut across all business levels**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 16: "I care if brands/companies represent my personal values", Gen Z vs older generations, June 2019

- **Today's 'on display' culture means commitment to values has to happen at all levels**
- **Spotlight on SoulCycle and Equinox**
- **Traditional loyalty programs are missing the mark with Gen Z**

Figure 17: Influence and perceptions of loyalty programs, Gen z vs older generations, April 2019

- **Gen Z men: Amazon Prime is upping the ante for all retailers**

Figure 18: Select attitudes towards loyalty programs (% any agree), men 18-24 vs overall, April 2019

WHAT'S NEXT?

- **Career goals reflect changing times**
- **The issue of balance may become a greater focus**

Figure 19: Experienced stress and anxiety in the past year, Gen Z vs older generations, May 2019

THE CONSUMER – WHAT YOU NEED TO KNOW

- **Gen Z are in a unique lifestage**
- **Gen Z are financially minded and uncertain about the future**
- **In-person time matters**
- **The fundamental values of Gen Z are different than older generations**
- **Reliance on tech leaves them feeling more isolated**

GETTING TO KNOW TODAY'S GEN Z

- **Most aren't adulting yet so mindset will be more self-oriented**

Figure 20: Key demographics: student status, living independently, coupled and parent status, Gen Z vs older generations, June 2019

- **Attracting Gen Z by meaningfully linking broader interests: spotlight on Amazon Prime**
- **Student status makes traditional loyalty programs a challenge**

Figure 21: Perception of financial situation, Gen Z vs older generations, June 2019

- **Raise the game by supporting causes that matter**
- **Diversity is the norm, inclusivity matters**
- **Gen Z are the most ethnically diverse generation to date**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 22: Ethnic makeup, Gen Z vs older generations, June 2019

- **Impact: diversity creates opportunities, but some 'traditions' need to be re-examined**
- **Lifestyles are also more diverse, inclusion needs to go beyond the rainbow logo**

Figure 23: Identifies as being part of the LGBT+ community, Gen Z vs overall, June 2019

- **Improving business practices to be more inclusive: spotlight on MasterCard and Lyft**

Figure 24: True Name, June 2019

STRESSORS AND GOALS

- **Gen Z are financially minded and uncertain about the future**

Figure 25: Goals hope to achieve in next five years, June 2019

- **Uncertainty looms, opening up opportunities for financial institutions**

Figure 26: Stressors, Gen Z vs older generations, June 2019

- **Weighed down by financial concerns, Gen Z women feel behind**

Figure 27: "My life isn't where I thought it would be at this point" (% any agree), Gen Z women vs overall, June 2019

- **Consider incorporating mental health as a component of financial education**

- **Let's talk about money management: spotlighting SoFi**

Figure 28: Money Talks Story #1 – Sophia + Imran, December 2018

Figure 29: Money Talks Story #2 – Alyssa + Keith, December 2018

- **Women and money: spotlighting Visa**

Figure 30: Money is Changing: The Cost, February 2019

Figure 31: Money is Changing: Pay equality in Hollywood, February 2019

FAVOURITE ACTIVITIES

- **In-person time matters**
- **Tech reliance doesn't necessarily mean a preference for alone time**

Figure 32: Attitudes towards socializing (% any agree), Gen Z vs older generations, June 2019

- **In-person time with friends and family are favourite activities for Gen Z**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 33: Activities enjoyed the most (any rank), Gen Z vs older generations, June 2019

- **Activity preferences differ for Gen Z men and women**

Figure 34: Activities enjoyed the most (any rank), Gen Z men vs Gen Z women, June 2019

- **Gen Z women: in-person social time counts for more, possibly out of necessity**
- **Showcasing togetherness: spotlighting Corona**
Figure 35: Together, March 2019
- **Friends that watch together stay together: consider promoting 'binge' nights**
- **Building communities from common interests will win over Gen Z men**
- **If you build it, they will come - consider promoting video game meet ups**

CONNECTING WITH GEN Z VALUES

- **The fundamental beliefs of Gen Z are unique from all other generations**

Figure 36: Top five most important values Canadians should have, Gen Z vs Millennials vs older generations, June 2019

- **Emphasis on a willingness to change – in their words**
- **Gen Z are a product of their time: they're paying attention and thinking critically**
- **Diversity is the norm - differences are embraced, not 'tolerated'**

Figure 37: 'Sense of community' and 'tolerance' as the most important value Canadians should have, Gen Z vs older generations, June 2019

- **Gen Z hold a more global view of people and categories**
- **It's personal - brands represent who they are**

Figure 38: 'The brands I use reinforce the image I want to portray' (% any agree), Gen Z vs older generations, June 2019

- **Brands that 'walk the walk' are noticed – in their words**
- **Gen Z are paying attention to social and environmental issues**

Figure 39: Issues concerned about, Gen Z vs Millennials vs older generations, June 2019

- **Affordable education and diversity matter to Gen Z...**

Figure 40: Trixie Mattel Presents Home of the Brave: Getting Ready, June 2019

- **...so does climate change and waste reduction**
- **Finding ways to close the loop: spotlight on Adidas**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **Choosing commitment to values over profits: spotlight on Patagonia**

IMPACT OF LIVING 'ON DISPLAY'

- **Greater digital connection leaves Gen Z feeling more isolated and judged**
Figure 41: Attitudes and impact of social media usage, Gen Z vs Millennials vs older generations, June 2019
- **The impact of living 'on display' is hitting Gen Z women harder**
Figure 42: Attitudes and impact of social media usage, Gen Z women vs Gen Z men, June 2019
- **Gen Z have less 'anchor' points for self-identity**
Figure 43: Correspondence analysis – Symmetrical map – Generational perspectives, June 2019
- **Building communities around other 'identity anchors' will matter**
- **Bonding over loss: spotlight on Pet Loss Café**
- **Want to work out your mental health? Spotlight on the Fika emotional fitness app**

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Consumer survey data**
- **Consumer qualitative research**
- **Correspondence analysis**
Figure 44: Generational perspectives, June 2019
- **Abbreviations**
- **Terms**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.