

Executive Summary

The results of this study reveal how Canadian Millennials are a diverse group; the various stereotypes often used to describe them are present, but these do not define this generation. Millennials share a common age bracket but reflect a range of experiences, perspectives, attitudes and activity when it comes to how they approach life, their careers, and engagement with politics and their community.

One of the most important differentiators among Millennials is education, which emerges as a key factor in how well Millennials are faring in the present, their outlook toward the future, and especially in the extent of engagement in politics and civic life. Household income (related to education) is also important in some areas, notably overall life satisfaction. By comparison, characteristics such as age within this cohort, gender, region, living situation and family composition play less of a role in Millennials' perspectives as they relate to the themes explored in this study.

Ethnic background and place of birth is another important part of the Millennial story in Canada. Millennials born outside the country and those with non-white ethnicity make up a significant proportion of the generation, the most ethnically-diverse in the country's history. These young adults stand out as having a more traditional orientation to adulthood and career success, while at the same time expressing greater motivation to succeed and optimism about their future prospects.

Social values – as organized into the six distinct “tribes” – provide the clearest portrait of the diversity encompassing this generation. These tribes reflect some of the key demographic patterns such as education and ethnicity, but go well beyond them to reveal a more holistic characterization of Millennials' orientation to life, career/work and political/civic engagement. **Engaged Idealists** are among the most socially connected and upbeat, already embarked on a meaningful career path and keen to make a contribution to society. They share much in common with a much smaller group, **Critical Counterculturists**, who take a more questioning stance on the status quo, status and authority.

Diverse Strivers and **New Traditionalists** are more ethnically-mixed groups, the former among the most focused on career success but also active in their communities, while the latter are the oldest and most established of the tribes,

and for whom traditional values and religion are important guideposts.

In sharp contrast, **Lone Wolves** (comprising one in six Canadian Millennials) are the group making the least progress in establishing themselves, and playing an active role in, in society. Compared with other Millennials, Lone Wolves are more likely to be unemployed or underemployed, have little or no post-secondary education, lack clear lifetime goals and confidence in future success, and are the least engaged in their communities.

Finally, **Bros & Brittanys** make up the largest segment of this generation (one in three), and as such tend to define the average in terms of their life experiences, aspirations and priorities. Financial stability is an important life goal and most are employed, but they also put a premium on having a good time and getting along rather than changing the world.

This typology offers a valuable framework for understanding Millennials in Canada, and determining how best to consider their priorities and interests with respect to marketing, public policy and citizen engagement.

Finally, this study underscores the fact that Millennials in many respects are not all that different from older generations of Canadians. There are predictable life cycle differences, as young adults tend to be more oriented toward exploration, novelty and crowds. But in terms of life goals, career aspirations, and community engagement, Millennials do not appear to differ much from their parents and grandparents. Where Canadian Millennials do stand out from previous generations is in their adaptability to complexity, having a flexible definition of family, embracing multiculturalism (while at the same time being more xenophobic than the two previous generations of youth), and being more accepting of authority and institutions (government, business, advertising).

Despite the challenging economic climate facing young adults today, Millennials are notably optimistic about their lives generally and their long term financial prospects, although also more focused on the principle of saving than Gen-Xers or Boomers were when they were young adults. At the same time, Millennials as a whole are more likely than other generations to lack life goals and feel alienated from society, an emerging social trend most clearly evident among Lone Wolves.

The following provides an overview of the key findings across the major themes covered in the study.

Defining a generation

What it means to be an adult. Millennials are most likely to define adulthood in terms of having a steady job and good relations with ones family, followed by home ownership and community engagement; these may well resemble the markers of being grown up for previous generations. But in sharp departure from the past, today's young adults are less likely to define adulthood in terms of the traditional markers of marriage and having children: Few in this generation consider these to be essential for being an adult, and almost half consider marriage to be not especially important. Millennials differ from their parents and grandparents in having a more flexible definition of family.

In contrast with other Millennials, Immigrants and others with Asian backgrounds are most likely to place importance on all of the markers of adulthood (but especially marriage and children), as are those in the most ethnically diverse social values tribes (Diverse Strivers, New Traditionalists). By contrast, Engaged Idealists and Critical Counterculturists – the most educated of tribes – are least apt to define adulthood in these terms, although they place importance on being engaged in ones community.

What is unique about Millennials. To older generations Millennials appear to stand out as being about everything digital and social media, but this is not how most in this cohort define themselves. Only one in four identify digital literacy as the characteristic that makes their generation unique or distinctive; most mention a diverse mix of other positive (e.g., open-minded) or negative (sense of entitlement) attributes, while more than one-third cannot come up with anything they believe captures the essence of their generation. Digital technology may be for Millennials what TV was for their Boomer parents and radio and movies for their Elder grandparents.

Financial circumstances and future prospects. As the youngest cohort of adults with many in the process of establishing themselves financially in a challenging economic climate, it is not surprising that fewer than four in ten Millennials feel they currently have enough money to live the kind of life they want. But they are notably optimistic about the prospects of achieving their financial goals in the future,

even among those with limited incomes. Immigrants and Millennials with Asian and other non-white ethnic backgrounds are especially confident about doing better financially than their parents. Current circumstances notwithstanding, Millennials' general orientation toward longterm financial security is more positive than that of older generations, both today and when they were themselves young adults.

What Millennials want out of life. What Millennials most want to have in their lifetime is positive family or partner relationships (defined variously in terms of marriage, love/relationships, children, quality time), followed by financial security and a meaningful career or work, as well as travel, and home ownership. The priority on family and relationships is at the top of the list across the generation, but is most evident for women, and those in the Engaged Idealist and New Traditionalist tribes.

But not all Millennials are looking ahead: One in five do not identify any lifetime goals for themselves, with this group most apt to include Lone Wolves, as well as men who live alone, those without a high school diploma, and those who are not looking for work. These are the young adults who are struggling to establish their lives and place in society, or may have already given up.

Career/work experience and aspirations

Current work experience. Eight in ten Millennials are currently working (whether full time, part time or self-employed), and most are reasonably if not fully satisfied with their current job. Job satisfaction is tied in part to household income, but also influenced by social values: Diverse Strivers are the most positive of tribes about their current employment, likely due to their strong motivation to succeed.

About half of working Millennials believe their salary and education/skills are well matched with their current job, although this is not strongly linked to job satisfaction. At the same time, one in three say they currently work in a job that is not directly related to their education and skills.

What Millennials want most from their work. Among five work/career goals presented, Millennials place the highest priority on achieving balance between work and their personal life, with eight in ten saying this is critically important to them. Close in importance is achieving financial security, with somewhat less emphasis placed on generating wealth and

having flexibility in how and when they work. Millennials as a cohort place the lowest career priority on making an important contribution to society, with this largely a function of social values: it is of strong importance to Engaged Idealists and Critical Counterculturists, and not so much among Bros & Brittanys and Lone Wolves..

Achieving work and career goals. Millennials are more likely than not to feel confident about achieving their work and career goals, but this is more likely to be the case for those with higher levels of education and income, as well as for Diverse Strivers and Engaged Idealists. Millennials are most likely to identify economic conditions (e.g., weak economy, lack of jobs, low salaries, lack of opportunities) as the biggest obstacle to achieving their goals.

But many also point to personal challenges, in the form of competing priorities (e.g., family, time pressures), and limitations such as laziness, lack of confidence or health issues. Family and friends are the principal source of support helping individuals toward their work and career goals, but almost four in ten do not appear to have any such support in their lives (most likely to be the case for Lone Wolves).

Value of post-secondary education. Post-secondary education has long been touted as important if not essential for career and life success, but many Millennials are not convinced of this. Only three in ten believe a degree is essential to having a fulfilling life. Among those who have a post-secondary degree, fewer than half say it has been very helpful so far in their career, and this group is evenly divided on whether or not they would get the same degree were they to do it over again (although few would opt to pursue something outside of formal education).

Among those who do not yet have a post-secondary degree, fewer than half now have plans to follow this path (if not already enrolled), while the balance are divided between those who say no and those who remain uncertain. Views about the value of post-secondary education improve along with current level of education, and are also most positive among immigrants and Millennials with a South Asian background.

Political and civic engagement

Following news and current events. Low voter turnout has earned Millennials a reputation for being disconnected from politics and current events, but this is more a stereotype than reality. Most Millennials say they follow news and current events at least daily if not multiple times per day, with frequency of attention linked closely to education level. The most commonly followed issues pertain to security and safety (e.g., terrorism, crime) and politics (Canadian, US, international), along with the economy and social issues.

As might be expected, social media is the most common media platform for keeping track of news and current events, but there is also widespread use of more traditional media including TV, print newspapers and radio.

Interest in politics and voting. Interest in politics is mixed, and largely a function of educational attainment and related social values: Strong interest is most widespread among Millennials with a graduate degree and Critical Counterculturists, and least evident among those without any post-secondary education and Lone Wolves.

Millennials are most likely to pay attention to national politics, but significant proportions also follow what is happening at the international and provincial/local levels. Three-quarters of Millennials eligible to vote report having done so in the 2015 federal election, with education the most significant predictor. Those not voting are most likely to give motivational reasons such as lack of trust in candidates or parties, cynicism about politics or feeling uninformed, while a smaller proportion cite barriers that kept them from voting, such as being too busy or out of town.

Active engagement in issues. About one in four Canadian Millennials have been actively engaged in a cause or issue over the past year, most likely involving social justice, the environment, politics or health care. Such involvement is linked to education as well as social values, with Engaged Idealists and Critical Counterculturists the most active (in contrast with Bros & Brittanys and Lone Wolves); these are also the tribes who feel most confident that collective action can make a difference in solving community problems. Millennials tend to get involved in causes or issues through online channels, but a significant proportion also prefer to participate in person at events and group meetings (especially New Traditionalists).

Volunteering. Millennials do volunteer work, but it is not the norm. One in three report having done some form of volunteer work in the past year, in most cases putting in fewer than five hours per month. Those who volunteer are most apt to be motivated to give back to their community or support an important cause, but many also do so for personal development (providing a sense of accomplishment, building experience and skills, networking and improving job opportunities). Many Millennials have not volunteered because they don't have the time or interest, but for others it is the lack of opportunity: no one has ever asked them or they do not know how to get involved.

As with other forms of engagement, volunteering increases with educational attainment, but is also more common among younger Millennials (who are less apt to have children), as well as among those who are ethnically non-white. Engaged Idealists, New Traditionalists and Diverse Strivers are the most active volunteers, with Bros & Brittanys and Lone Wolves least apt to do so.

Charitable giving. Two-thirds of Millennials have donated money or goods in the past year, although amounts are modest (few have given more than \$300). Donations are most common among women, Albertans and New

Traditionalists (likely due to their religious affiliations), and only slightly more likely among those who have also volunteered their time in the past year. Millennials are most likely to make their donations online (including crowdfunding), but significant numbers have also done so in person, whether in the workplace, on the street or at charity events.

Social trust. Engagement in society is both a precursor and an outcome of general trust in other people, and the evidence suggests that Millennials may be less trusting than previous generations. Only one-third in this cohort believe most people can be trusted, compared with two thirds who say you cannot be too careful dealing with other people. Trust in others is most closely linked to education level and also related social values tribes, with Critical Counterculturists and Engaged Idealists the most trusting while Bros & Brittanys and Lone Wolves the least so.

Social trust does not differ between native born and immigrant Millennials, but is more pronounced among men, B.C. residents (and least so in Quebec), as well as among those who belong to one or more local groups or organizations.