

Canadian Millennials

Social Values Study



EXECUTIVE SUMMARY

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THE J.W. McCONNELL
FAMILY FOUNDATION

Introduction

Canada's Millennial generation

Millennials make up more than a quarter of the Canadian population. The cohort of Canadians born between 1980 and 1995 (now aged 21 to 36) is one of the largest in the country's history, and is literally the country's future: who they are today and what they become will shape Canada for the next half-century and beyond. Leaders and institutions need to understand and support these young adults as citizens, consumers, employees, voters and donors.

Much of what passes for analysis of this generation of Canadian adults amounts to little more than anecdote and stereotype. Aside from data on youth unemployment, student debt and the embrace of everything digital, the Canadian conversation is remarkably devoid of solid evidence about how Millennials live, what they think, what they value, what they want, or what they hope to achieve. Are they motivated strivers facing a tough job market, or entitled brats who are too picky to accept an unfulfilling job? Are they talented digital innovators or just screen addicts? Have they been nurtured by their Boomer parents' loving encouragement, or are they entitled narcissists poisoned by a lifetime of unearned praise? Newspapers, newsfeeds and dinner tables teem with opinions.

Perhaps the biggest limitation in this discussion is how it lumps an entire generation into a single group, the implicit assumption being that age alone is the defining characteristic. This type of shorthand misses the important insights revealed by Michael Adams two decades ago in his landmark book *Sex in the Snow*. In that bestselling analysis of Canadian society, Adams showed that demography is no longer destiny, and that every generation is composed of distinct subgroups or "tribes," each defined by a unique constellation of social values by which individuals orient themselves to the world and their lives.

Most of the focus on this emerging generation comes from marketers' intent on discovering how best to effectively position and promote products and services. But Millennials are also citizens of the country, their province and local community. As much as we may need to know what products they desire, it is equally essential to understand how this generation views its place in society, its approach to work and careers, and its involvement in community.

The study

The Environics Institute for Survey Research partnered with The Counselling Foundation of Canada, RBC, The McConnell Family Foundation and Apathy is Boring to conduct a seminal study of Canada's Millennials to understand how members of this generation are taking their place in society through the lens of their social values. The primary focus of this study is in three areas:

- Life goals and markers of adulthood
- Career aspirations and work
- Political and civic engagement

The study employs survey research methods to examine the experiences, priorities, attitudes and social values of Millennials across Canada, and identifies where there is commonality across the generation and where there are meaningful differences, whether by life stage, demographics or social values. This research also provides valuable insight into how Millennials are similar and different from their Boomer parents and the Gen-Xers just ahead of them.

The research consisted of an in-depth survey conducted online with a representative sample of 3,072 Canadians aged 21 to 36 across Canada. The survey was administered by the Environics Research company between July 6 and August 31, 2016, and the sample was stratified by age, gender and region.

This report provides a summary of key findings from the research, including an introduction to the six Millennial social values tribes underlying the analysis. A full report of the study findings is available under separate cover from the Environics Institute (www.environicsinstitute.org).

Social values and Canadian Millennials

Defining social values

The term “social values” today takes on many meanings and connotations, as for example “family values” whose precise nature is tacitly assumed if not well-defined. But the term also has a more conceptually coherent definition that encompasses beliefs about: a) desirable modes of conduct and how one should live (e.g., honesty, hard work); and b) social ideals and outcomes (e.g., peace, good health). Such formative and fundamental beliefs about desirable means and ends are thought to be largely molded in adolescence and early adulthood experience.

Social values are informed by people’s prevalent experiences and perceptions, gained through family and social contacts, as well as exposure to broader societal events and trends. Such values may have an idealistic and ideological dimension, but perhaps more importantly they serve pragmatically as an adaptation to, and justification for, current personal or cultural practices. In this way, values may best be described as deeply held beliefs that both determine and reflect a person’s responses to the world as he or she strives to meet basic and higher-order needs. In total, one’s social values represent a host of mental, emotional and motivational postures with which one navigates life, and interacts with others and oneself, as well as making moral decisions about what is good and bad.

The Environics Research company (separate from the non-profit Institute) has been pioneering social values research in North America since the 1980s. This work has served as the foundation for several books published by Michael Adams, including *Sex and the Snow: Canadian Social Values at the End of the Millennium* (1997); *Fire and Ice: The United States, Canada and the Myth of Converging Values* (2003), and *Stayin’ Alive: How Canadian Baby Boomers will Work, Play and Find Meaning in the Second Half of their Adult Lives* (2010).

The Environics Research social values methodology incorporates a set of 80 or so social value trends or “constructs,” based on research and in-depth multivariate analysis. Examples of social values include:

- **Adaptive navigation.** Having the flexibility to adapt to unforeseen events that interfere with the realization of

one’s goals. Being flexible in defining one’s expectations and ways of meeting one’s objectives.

- **Joy of consumption.** Intense gratification through consumption of consumer goods (other than basic necessities). Enjoying consumption for the pleasure of consumption (feeling more excited about the act of buying than by the use of the products purchased).
- **Acceptance of violence.** The belief that violence is an inevitable part of life. People strongest on this trend even accept violence as an outlet for letting off steam or as a way of getting what they want.

The individual social value trends are combined in terms of how they relate to one another, and collectively form an underlying structure that portrays higher-order world views. This analysis provides a distinct social values profile for particular segments of the population, such as a generation. Two decades ago, the book *Sex in the Snow* introduced the social values “tribes” of Canadian generations (Elders, Boomers, Gen-Xers). The premise of the book is that demography is no longer destiny; people and society can no longer be understood according to the traditional categories of gender, age and social class, and that social values are as important, if not more so, in what drives human behaviour and social trends.

Meet the Canadian Millennial social values tribes

In 2015, Environics Research identified the six distinct social values tribes of the Canadian Millennial generation, which are as follows:



Bros and Brittany

Bros & Brittany (32% of Millennials)

This is the largest group, making up one-third of the generation. Bros & Brittany are avid risk-takers who pursue thrills and excitement, and are enthusiastic consumers. They are Millennials who work hard to get paid and have the lifestyle they want. They embrace technology and appreciate social connectivity. Looking good and being respected is important to them—and, as such, they like to stay current with the latest trends.

Bros & Brittanys are not looking to change the world and sometimes they don't feel in control of their destinies. Time for an escape and a little fun like catching a concert, beer and HD sports in the man cave or a girls' night out are important to them



Diverse Strivers (20%)

To Diverse Strivers, 'making it' in life, and doing things that bring new and intense experiences are top priorities. These

Millennials crave material success and they push themselves to achieve it in a number of ways. They work hard in their careers and pursue personal challenges (like marathons or marathon hot yoga sessions) in the off-hours. They strive to inspire respect in those closest to them by doing their duty, and being upstanding members of their families and communities. They take care to look good, and have the latest gadgets and toys to maintain a sharp and successful appearance.

Diverse Strivers report high levels of vitality—they love crowds, attention and pursue intensity in all they do—and they need every bit of their energy to keep pushing forward toward their goals; they never stop building their resumes to satisfy their ambitions and impress others.



Engaged Idealists (17%)

Engaged Idealists are Millennials on steroids: engaged, sociable, energetic, experience-seeking and idealistic. They believe in

contributing as much as possible to their relationships, careers and communities—and the reward for their efforts is personal growth and development. These Millennials believe that their actions matter, shaping their lives and the world around them. They recognize that their environment is complex, but feel confident in their ability to navigate it.

Engaged Idealists want interesting, meaningful careers that let them express themselves and use the creativity that is central to their identity. Money is nice, but the quality of their work experiences is a higher priority. They also try to have time for spontaneous fun, which they see as an important part of a happy, balanced life.



Lone Wolves (16%)

Deeply skeptical of authority, and lacking strong social and emotional connections,

Lone Wolves resemble the stereotypical Gen Xers of the 1990s: cool and standoffish. These Millennials are solitary, and favour keeping life simple and straightforward. They are seldom involved in community events and rarely feel strongly connected to what's going on in society at large. Still, whereas some people feeling disconnected from society are angry or hostile to others, Lone Wolves are low-key (e.g., not xenophobic or sexist). If disaffected Gen Xers' motto was "Whatever," Lone Wolves' words to live by might be "I'm not hurting anyone. Just let me be."



New Traditionalists (11%)

As their name suggests, New Traditionalists hold many values that would not be out of place in the 1950s—but their outlook also

reflects some distinctly 21st century concerns, including an interest in environmental issues. These Millennials are more religious and spiritual than others: Religion is an important part of their lives and central to their identity. They believe in staying true to the values with which they were brought up, particularly towards conservative family and gender roles.

New Traditionalists also value traditional modes of etiquette and propriety: appropriate dress, good manners, respect for elders, a tidy home. They respect authority figures more so than their peers, report a stronger sense of duty, and a greater sense of identification with their family roots and ancestors.



Critical Counterculturists (4%)

By far the smallest of the segments,

Millennials in the Critical Counterculture segment are the engaged, critical young

people sometimes featured in stories about 20-somethings building businesses, pursuing groundbreaking online activism, and otherwise shaking up the world. They share many of the same progressive values as Engaged Idealists: They believe in gender equality, are at ease with diversity of all kinds, and reject discrimination and injustice.

But while Engaged Idealists see the world through a social and emotional lens – pursuing authentic relationships and experiences, and striving to express their true selves – the gold standard for Critical Counterculturists is clear-eyed rationality. They reject status and authority they see as illegitimate or superficial; they don't mind leading when they can add value to a project, but would hate for someone to judge them by their jeans or smartphone.

Key findings

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.

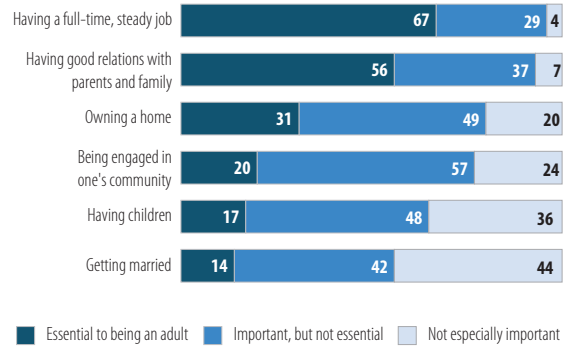
But in sharp departure from the past, today's young adults are less likely to define adulthood in terms of the traditional markers of marriage and having children: Few in this generation consider these to be essential for being an adult, and almost half consider marriage to be not especially important. 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 one's community.

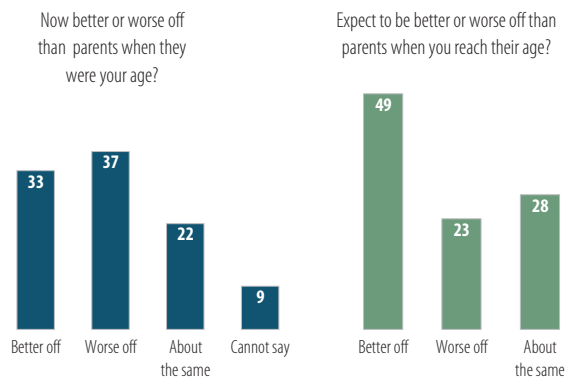
Financial circumstances and future prospects. As the youngest cohort of adults with many in the process of establishing themselves financially in a challenging economic climate, it is not surprising that fewer than four in ten Millennials feel they currently have enough money to live the kind of life 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 themselves were young adults.

Important markers of adulthood



Financial prospects compared with parents



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.

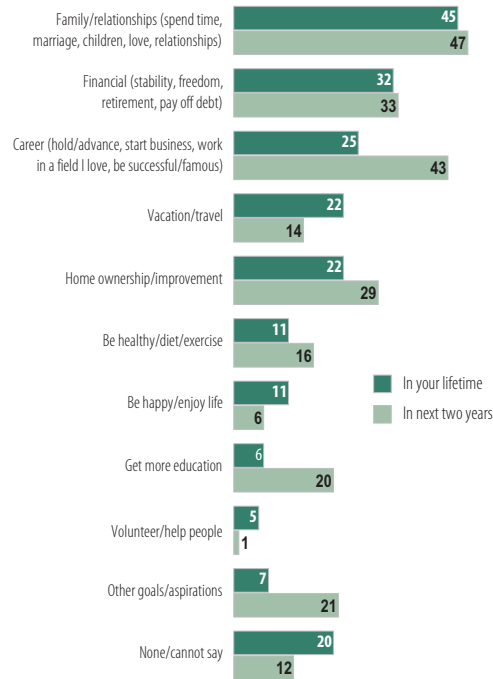
Career/work experience and aspirations

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.

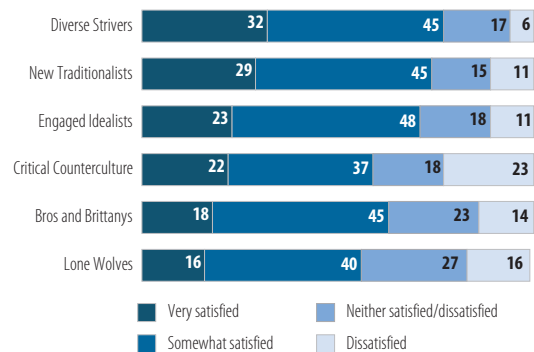
What Millennials want most from their work and career. Among five work/career goals presented, Millennials place the highest priority on achieving balance between work and their personal life, with eight in ten saying this is critically important to them. Close in importance is achieving financial security, 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 & Brittany's and Lone Wolves.

Life goals and aspirations

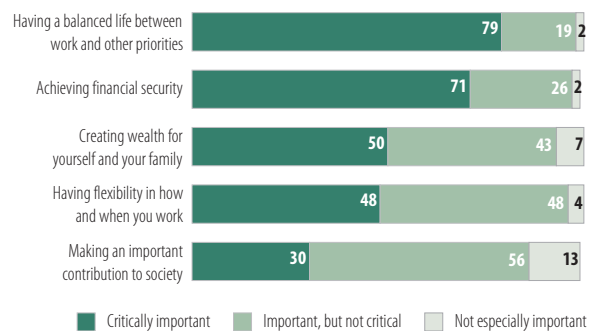


Current job satisfaction

By social values tribe



Importance of work and career goals



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

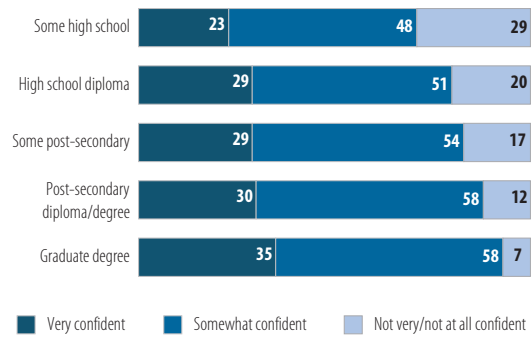
Value of post-secondary education. Post-secondary education has long been touted as important if not essential for career and life success, but many Millennials are not convinced of this. Only three in ten believe a degree is essential to having a fulfilling life.

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.

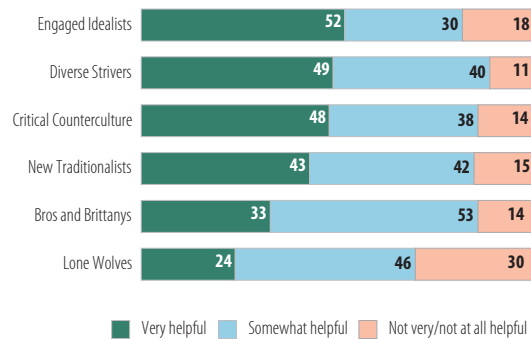
Confidence in attaining career goals

By education levels



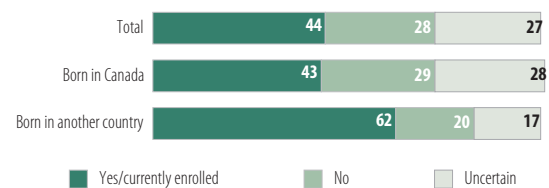
How valuable has your post-education been?

By social values tribe



Plan to get further post-secondary education

Those without a post-secondary degree, by place of birth



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 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.

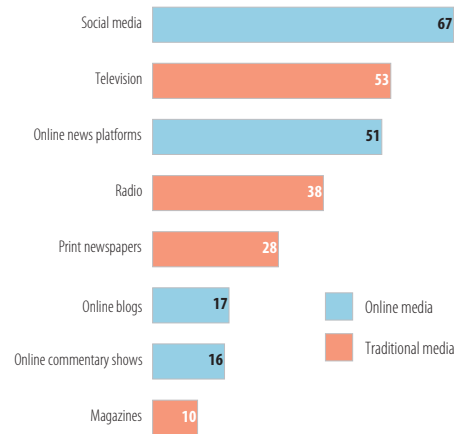
Interest in politics and voting. Interest in politics is mixed, and largely a function of educational attainment and related social values: Strong interest is most widespread among Millennials with a graduate degree and Critical Counterculturists, and least evident among those without any post-secondary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

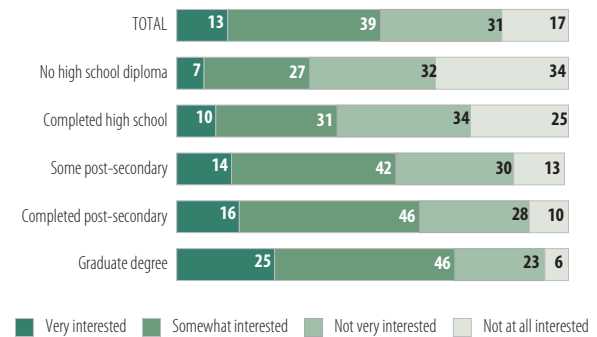
Which media do you use for news/current events? *



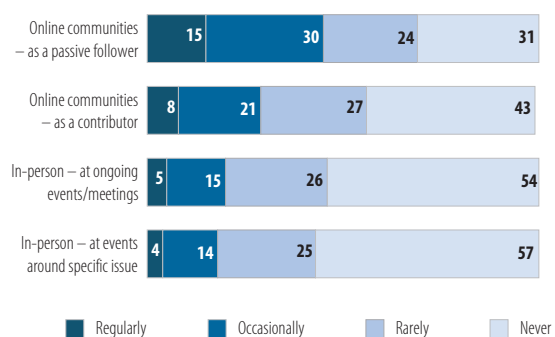
* Those who follow issues at least several times per month

Current interest in politics

By educational attainment



How have you been actively engaged – past 12 months?



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 get involved.

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.

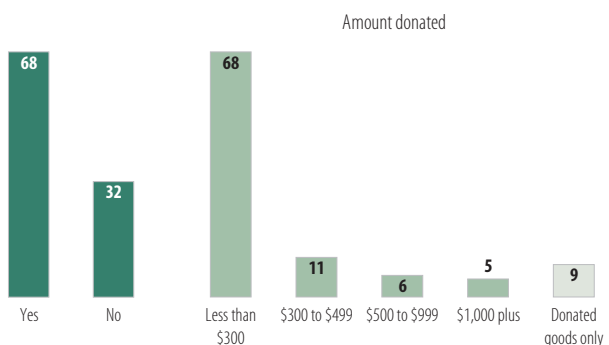
Millennials are most likely to make their donations online (including crowdfunding), but significant numbers have also done so in person, whether in the workplace, on the street or at charity events.

Reasons for volunteering

Those volunteering in past 12 months

	%
TO MAKE A CONTRIBUTION/ SUPPORT A CAUSE	
Make a contribution/give back	55
You/someone has been affected by issue/cause (e.g., cancer)	32
Asked by friend to volunteer	26
Family/friends already volunteer	24
Support a particular cause	24
Fulfill religious obligation	11
FOR PERSONAL/PROFESSIONAL DEVELOPMENT	
Sense of accomplishment	47
Use experiences and skills	41
Explore personal strengths	25
Network/meet people	24
Improve job opportunities	24
Improve well-being or health	21

Charitable donations in past 12 months?



Study conclusions

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 they 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 Counterculturalists**, who take a more questioning stance on the status quo 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** (one in six Canadian Millennial) are making the least progress in establishing themselves and playing an active role in society. Compared with other tribes, 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, interests, strengths and limitations in supporting their career development and life skills.

Finally, this study underscores the fact that Millennials in many respects share much in common with the two previous generations of Canadians. There are predictable life cycle differences, as young adults tend to be more oriented toward exploration and risk taking, the pursuit of novelty, status recognition, and new technology. But in terms of life goals, career aspirations, and community engagement, Millennials do not appear to differ all that much from their parents and grandparents.

Where Canadian Millennials do stand out from previous generations when they were young is in their adaptability to complexity, having a flexible definition of family, embracing multiculturalism and a global consciousness (while also more xenophobic), and being more accepting of authority.

In the face of challenging economic climate, Millennials are notably optimistic about their lives generally and their long term financial prospects. At the same they are also more concerned about their finances than Gen-Xers were at their age (a legacy of the last financial crisis), and perhaps for this reason are also more focused on the principle of saving and being discriminating consumers. Finally, Millennials as a whole are more likely than the two previous generations to lack life goals and to feel alienated from society, an emerging social trend most clearly evident among Lone Wolves.

This study was conducted by the Environics Institute for Survey Research, in partnership with the following organizations:

THE COUNSELLING FOUNDATION OF CANADA

The Counselling Foundation of Canada is a private foundation, which champions learning and career development to help Canadians nurture the gifts and talents within themselves. Our vision is a day when all Canadians are living purposeful and productive lives, helping to build a better, more prosperous society.

ROYAL BANK OF CANADA

Royal Bank of Canada (RBC) is Canada's largest bank, and one of the largest banks in the world, based on market capitalization. One of North America's leading diversified financial services company, it provides personal and commercial banking, wealth management, insurance, investor services and capital markets products and services on a global basis. RBC supports a broad range of community initiatives through donations, sponsorships and employee volunteer activities.

THE J.W. MCCONNELL FAMILY FOUNDATION

The Foundation's purpose is to enhance Canada's ability to address complex social, environmental and economic challenges. We accomplish this by developing, testing, and applying innovative approaches and solutions; by strengthening the community sector; and by collaborating with partners in the community, private, and public sectors. We recognize that creating enduring change takes time, and involves more than granting.

APATHY IS BORING

Apathy is Boring, founded in 2004, is a non-partisan charitable organization that uses art and technology to educate youth about democracy, with the aim of increasing youth voter turnout, increasing youth engagement in the democratic process, and building a sustainable dialogue between youth and decision makers. Apathy is Boring's philosophy is that empowering youth as decision makers can have a significant impact on democracy, that reaching unengaged youth should be a priority, and that facilitating intergenerational partnerships is key to democracy's long-term success.

THE ENVIRONICS INSTITUTE FOR SURVEY RESEARCH

The Environics Institute for Survey Research sponsors relevant and original public opinion and social research related to issues of public policy and social change. It is through such research that organizations and individuals can better understand Canada today, how it's been changing, and where it may be heading.

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