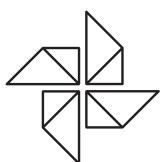


Canadian Millennial and Gen Z Social Values Study 2020

IMPACT OF THE COVID-19 PANDEMIC ON MILLENNIAL AND GEN Z CANADIANS

March 2021



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A high-contrast, black and white photograph showing the silhouette of a person's head and shoulders. The person is facing left, looking out of a window. The window has multiple panes, and bright light is streaming through them, creating a strong glow and casting deep shadows. The person's hair is dark and pulled back. The overall mood is contemplative and somber.

The **Envirronics Institute for Survey Research** partnered with **Apathy is Boring** and **Youth Friendly** to conduct a major study of Canada's Millennial and Gen Z generations (those between the ages of 18 to 40), to better understand their perspectives and priorities. The research updates a previous study conducted with Canadian Millennials in 2016, also conducted with Apathy is Boring and other partners. This new research identifies how the perspectives and activities of Millennials has evolved over the past four years, and provides a first look at the older portion (leading edge) of Canada's Gen Z generation.

The research consisted of an in-depth survey conducted online with a representative sample of 5,264 Canadians ages 18 to 40 across the country, which included Millennials (ages 25 to 40) and leading-edge Gen Zers (ages 18 to 24). The survey was administered by Envirronics Research between September 8 and November 9, 2020.

This short report examines how Millennial and Gen Z Canadians have experienced the COVID-19 pandemic. Further reports on a wider range of survey findings will be published later in 2021.

EXECUTIVE SUMMARY

The COVID-19 pandemic has affected Canadians of all ages, from the youngest children unable to join pre-school activities or spend time with their grandparents, to the oldest seniors most susceptible to the virus itself. Gen Z and Millennial Canadians – those between the ages of 18 and 40 – have had their own particular concerns. The youngest among them are in the process of completing secondary school and embarking postsecondary education in the midst of school closures and a shift to online learning. Those who have completed their education are transitioning into the labour market during a prolonged economic shutdown. Older Millennials are managing the effects of the pandemic while juggling both emerging careers and the needs of young families and aging parents.

In this context, the attention of Gen Z and Millennial Canadians, not surprisingly, has been captured by the pandemic. COVID-19 was the news and current affairs issue they followed most closely in the few months preceding the Canadian Millennial and Gen Z Social Values Study, conducted in the fall of 2020, and it was also most likely to be mentioned as the most important problem facing the world today. At the same time, the pandemic has not displaced all other concerns: for many members of these two generations, the environment and climate change also remain top of mind, especially when thinking about the longer term. This is particularly the case for younger members of Gen Z, who are less likely to mention the pandemic, and more likely to mention the environment or climate change, as the most important problem facing the world today.

A majority of Canada's younger generations (those between the ages of 18 and 40) also say that the COVID-19 pandemic has had either a major or at least a moderate impact on their lives. The impact is most likely to have been felt in terms of emotional health and well-being: two in three report that the pandemic has had

a major or moderate impact in this area of their lives. Three in five report a major or moderate impact on their ability to continue with their work or education, and on their day-to-day finances and ability to pay bills. Younger members of these generations, women, students and those looking for work, and those who identify as Indigenous, Black or South Asian are all more likely to report significant impacts from the pandemic.

Few members of the Millennial and Gen Z generations expect the pandemic to end quickly. Only one in ten expect their life to return to normal within the next six months (roughly, by the spring of 2021).

A majority of Millennial and Gen Z Canadians are also confident that real progress can be made over time in addressing pandemics like COVID-19 at the global level. Younger members of Gen Z (those age 18-21) are the most confident that this kind of progress can be made. Notably, Millennial and Gen Z Canadians are more likely to expect progress in addressing pandemics than they are in the case of climate change. Just as Millennial and Gen Z Canadians are more likely to see climate change than COVID-19 as the biggest problem facing the world in the future if nothing is done to address it, they are also more likely to have confidence in the world's ability to make progress in dealing with pandemics than with climate change.

Most expect their lives to return to normal after the pandemic in somewhere between seven months' and two years' time.

THE COVID-19 PANDEMIC: THE DOMINANT ISSUE, BUT NOT THE ONLY ONE

COVID-19 is the issue that Gen Z and Millennial Canadians have been following most closely in the past few months, and also the one most likely to be seen as the most important problem facing the world today. At the same time, the pandemic has not displaced all other concerns: climate change remains top of mind for many, especially when thinking about the longer term. Younger members of Gen Z, in particular, are less likely to mention the pandemic as the most important problem, and are more likely to be concerned about environment or climate change.

At the time of the survey, in the Fall of 2020, COVID-19 pandemic was the issue most likely to have captured the attention of Canadians between the ages of 18 and 40.

One in two (51%) said that COVID-19 is the news and current affairs issue they have been following most closely in the past few months. The issue next most likely to be followed was the U.S. election (22%). One in ten (11%) Canadians in this age group said they followed racism and protests against racial injustice more closely than any other issue.

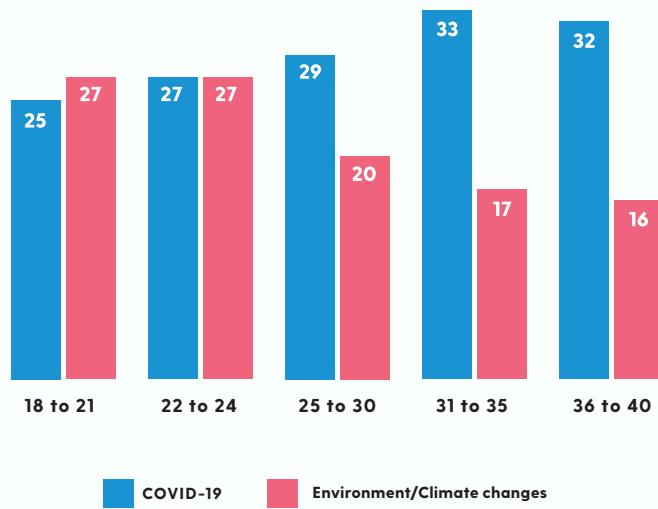
COVID-19 was also most likely to be mentioned by Canadians between the ages of 18 and 40 as the most important problem facing the world today, but in this case its edge over other concerns was not as great: 29 percent cited COVID-19 as the most important problem, compared to 20 percent who mentioned the environment or climate change, and nine percent who mentioned racism or discrimination.

Views on which problem is the most important vary by age: younger members of Gen Z are less likely to mention the pandemic, and more likely to mention the environment or climate change. The reverse is true for older Millennials, who are twice as likely to say COVID-19 is the most important problem facing the world today as they are to say it is climate change.

Previous studies have shown that views on which problem is the most important can vary significantly depending on whether people are asked to think about current events, or about the future and what might happen if key issues are left unaddressed. To explore this, the survey asked some participants more specifically about the most serious problem facing the world in the future if nothing is done to address it. In this case, the environment or climate change overtakes concerns about COVID-19:

37 percent mention the environment or climate change, compared to 12 percent who mention COVID-19. Members of Gen Z (47%) are even more likely than Millennials (35%) to say that the environment or climate change will be the most serious problem facing the world in the future if nothing is done to address it.¹ These findings suggest that while the pandemic may have displaced climate change as the most immediate preoccupation for members of these generations, climate change remains their top concern when viewed over the longer-term.

Most important problem facing the world
By age group



Q.67
In your opinion, what is the most important problem facing the world today?

IMPACT OF THE COVID-19 PANDEMIC

A majority of Millennial and Gen Z Canadians say that the COVID-19 pandemic has had at least a moderate impact on their lives, with the impact felt most acutely in terms of emotional health and well-being. Younger members of these generations, women, students and those looking for work, and those who identify as Indigenous, Black or South Asian are all more likely to report being impacted by the pandemic.



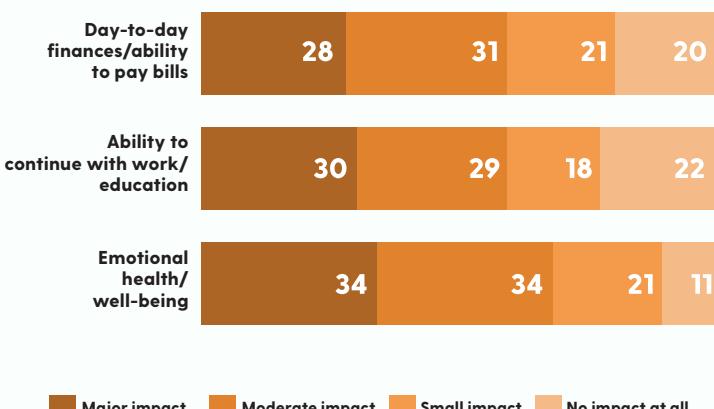
A majority of Canadians between the ages of 18 and 40 say that the COVID-19 pandemic has had at least a moderate impact on their lives. At the same time, a sizeable minority report feeling only a small impact or no impact at all.

The impact is most likely to have been felt in terms of **emotional health and well-being**: 68 percent report that the pandemic has had a major or moderate impact in this area of their lives. Somewhat fewer (59%) report that COVID-19 has had a major or moderate impact on their **ability to continue with their work or education**; the same proportion (59%) report a major or moderate impact on their **day-to-day finances** and ability to pay bills.

Two in five say that the pandemic has only had a small impact or no impact at all on either their ability to continue with their work or education or their day-to-day finances and ability to pay bills. One in three say there has only been a small impact or no impact at all on their emotional health and well-being.

There are a number of important differences among members of the Millennial and Gen Z generations in the ways in which the pandemic has been experienced.

Personal impact of the COVID-19 pandemic



Q.80

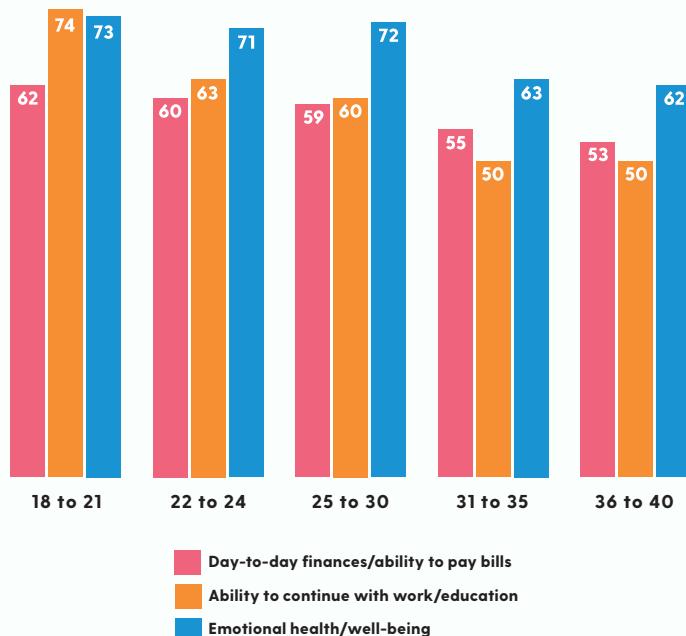
To what extent has the COVID-19 pandemic affected you personally to date, in term of:



- **AGE:** the extent of the pandemic's impact increases as age decreases, meaning that younger Gen Z Canadians are most likely to have felt a major or moderate impact, while older millennials are the least likely. The difference is most pronounced in the case of the impact on work and education: 74 percent of those aged 18 to 21 experienced a major or moderate impact on their ability to continue with their work or education, compared to 50 percent of those aged 36 to 40.
 - **EMPLOYMENT STATUS:** not surprisingly, the financial impact of the pandemic has been less severe for those who are employed – especially if they are employed full-time – compared to those who are looking for work. Among those employed full-time, for instance, 22 percent say that the pandemic has had a major impact on their day-to-day finances and ability to pay bills, while slightly more (25%) say there has been no impact at all. By contrast, among those looking for work, 47 report a major impact while only nine percent say there has been no impact. Students also report more disruption than those who are employed full-time. In terms of their ability to continue with their work or education, 37 percent of students report a major impact, and 77 percent report a major or moderate impact; this compares to 21 percent (major impact) and 50 percent (major or moderate impact) among those working full-time.
 - **RACE AND ETHNICITY:** the impact of the pandemic varies significantly by ethnicity or race, with those who identify as white or Chinese less likely to report major impacts on their finances, work or education, and well-being than those who identify as Indigenous, Black or South Asian. In terms of the day-to-day finances, for instance, 44 percent of those who identify as Indigenous, 38 percent of those who identify as Black, and 36 percent of those who identify as South Asian report a major impact, compared to 25 percent of those who identify as white and 19 of those who identify as Chinese.
 - **GENDER:** women (38%) are more likely than men (30%) to say that the pandemic has had a major impact on their emotional health and well-being. The difference is more pronounced within the Gen Z cohort: among those between the ages of 18 and 24, 45 percent of women, compared to 31 percent of men, say that the pandemic has had a major impact on their emotional health and well-being; among Millennials, the figures are 35 percent and 28 percent respectively.
- These findings are generally consistent with those of another Environics Institute study conducted at the end of the summer of 2020, which also found that the impacts of the pandemic (and especially the mental health impacts) were felt more severely by younger Canadians, by women and by those who are racialized.²

Personal impact of the COVID-19 pandemic

Major or moderate impact, by age group

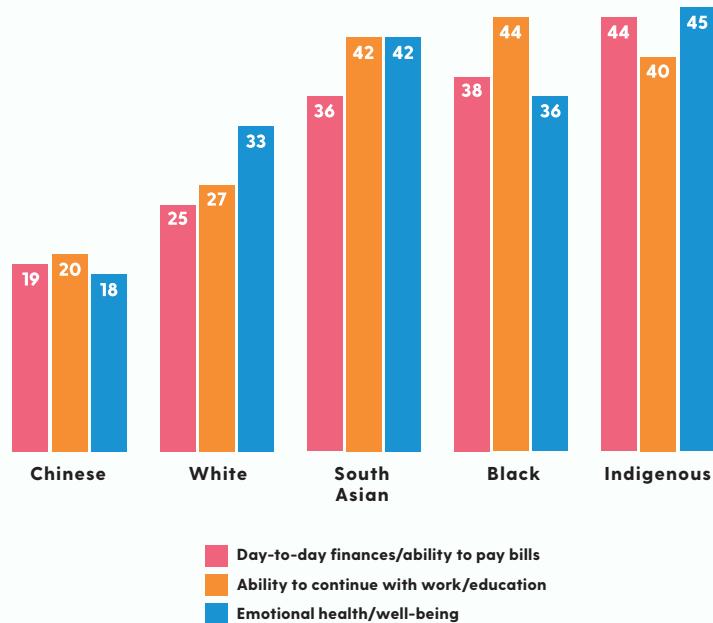


Q.80

To what extent has the COVID-19 pandemic affected you personally to date, in term of:

Personal impact of the COVID-19 pandemic

Major impact, by ethnic group or race

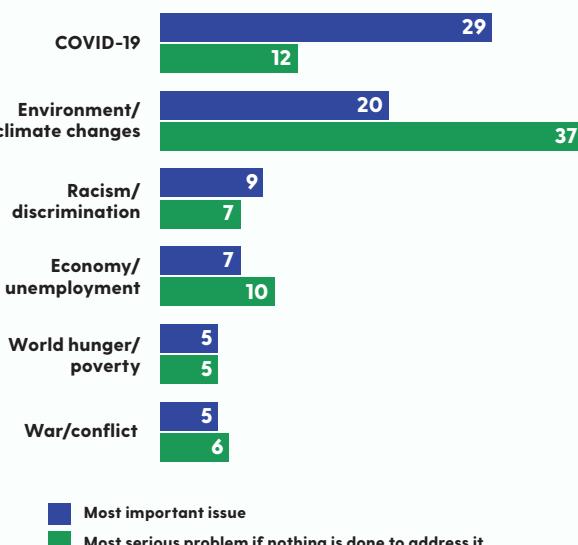


Q.80

To what extent has the COVID-19 pandemic affected you personally to date, in term of:

Most important problem facing the world

Top mentions



Q.67

In your opinion, what is the most important problem facing the world today

Q.68

In your opinion, what do you think will be the most serious problem facing the world in the future if nothing is done to address it ?

LOOKING AHEAD

Most Millennial and Gen Z Canadians expect their lives to return to normal after the pandemic in somewhere between seven months' and two years' time. Gen Z men are notably more optimistic in this regard than Millennial women. Most are also confident that real progress can be made over time in addressing pandemics like COVID-19 at the global level.

When do you think your life is most likely to return to normal? Few members of the Millennial and Gen Z generations expect the pandemic to end quickly. Only one in ten (10%) expect their life to return to normal within the next six months (roughly, by the spring of 2021). More (23%) expect that a return to normal life will come in the next seven to 12 months, or in the next one to two years (35%).

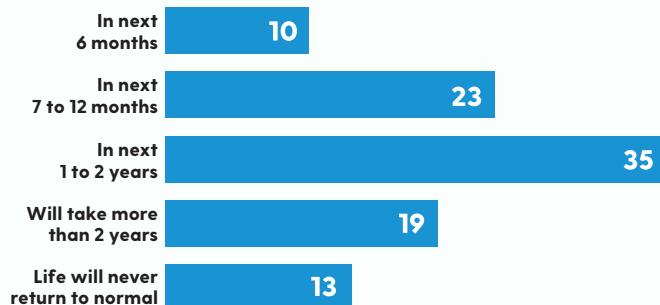


About one in five (19%) say that it will take more than two years for things to get back to normal, while 13 percent say that because of the pandemic, life will never return to normal.

There are modest differences in view by age: younger members of Gen Z (those age 18-21) are the most optimistic (40 percent of this group expect their lives to get back to normal within the next 12 months), whereas older Millennials (those age 36 to 40) are the least optimistic (only 31 percent expect things to get back to normal within the next 12 months). Men are also somewhat more optimistic than women. Looking at both age and gender together, 42 percent of Gen Z men expect their lives to get back to normal within the next 12 months, compared to 29 percent of Millennial women.

Within the Millennial and Gen Z cohorts as a whole, those who identify as Indigenous are the most pessimistic about whether their lives will ever get back to normal, with 23 percent saying this will never happen (compared to the average of 13%).

Looking ahead, when do you think your life is most likely to return to normal from pandemic?



Q.81

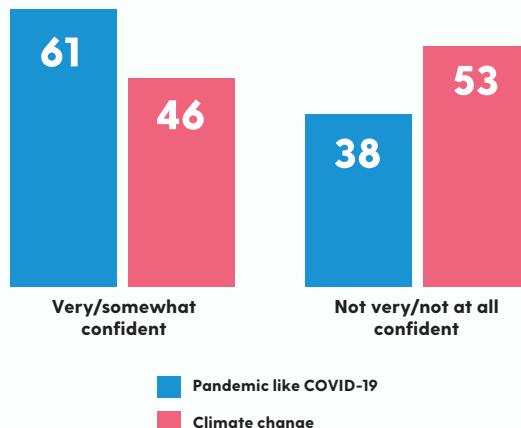
Looking ahead, when do you think your life is most likely to return to normal from the pandemic?



How confident are you that real progress can be made over time in addressing the pandemic? A majority of Millennial and Gen Z Canadians (62%) is also either very (18%) or somewhat (43%) confident that real progress can be made over time in addressing pandemics like COVID-19 at the global level. However, almost two in five (38%) are not very (27%) or not at all (11%) confident. Younger members of Gen Z (those aged 18-21) are the most confident (77%).

Millennial and Gen Z Canadians are more likely to expect progress in addressing pandemics than they are in the case of climate change: fewer than one in two (46%) are very or somewhat confident that real progress can be made over time in addressing climate change at the global level, while 53 percent are not very or not at all confident. Just as Millennial and Gen Z Canadians are **more likely** to see climate change than COVID-19 as the biggest problem facing the world in the future if nothing is done to address it, they are also **less likely** to have confidence in the world's ability to make progress in dealing with climate change than with pandemics.

Confidence that progress can be made in addressing global issues



Q.69A and E

And how confident are you that real progress can be made over time in addressing each of the following issues at the global level?

SURVEY QUESTION COVERED IN THIS REPORT:

Q.49A: And what news and current affairs issues have you been following most closely in the past few months?

Q.67: In your opinion, what is the most important problem facing the world today?

Q.68: In your opinion, what do you think will be the most serious problem facing the world in the future if nothing is done to address it?

Q69. And how confident are you that real progress can be made over time in addressing each of the following issues at the global level?

A. Climate change

E. Pandemics like Covid-19

Q.80: To what extent has the Covid-19 pandemic affected you personally to date, in terms of:

A. Your day-to-day finances and ability to pay bills

B. Your ability to continue with your work or education

C. Your emotional health and well-being

Q.81: Looking ahead, when do you think your life is most likely to return to normal from the pandemic?



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Apathy is Boring is a non-partisan, charitable organization that supports and educates youth to be active and contributing citizens in Canada's democracy. Our Vision: A Canada where every young Canadian is an active citizen and youth are meaningfully engaged in all aspects of the democratic process.



Youth Friendly, a consulting program under Apathy is Boring, collaborates with partners to drive innovation by strategically and intentionally integrating diverse youth perspectives in their work and practices through our carefully curated services. We want to see a Canada where every young person is an active citizen, and diverse youth perspectives are an integral part of designing our future.

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The Environics Institute for Survey Research, was established in 2006 as an independent non-profit organization to promote relevant and original public opinion and social research on important issues of public policy and social change. It is through such research that organizations and individuals can better understand Canada today, how it has been changing, and where it may be heading.

For further information see www.EnvironicsInstitute.org, or contact Dr. Andrew Parkin andrew.parkin@environics.ca

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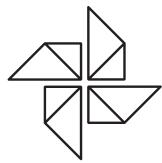
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