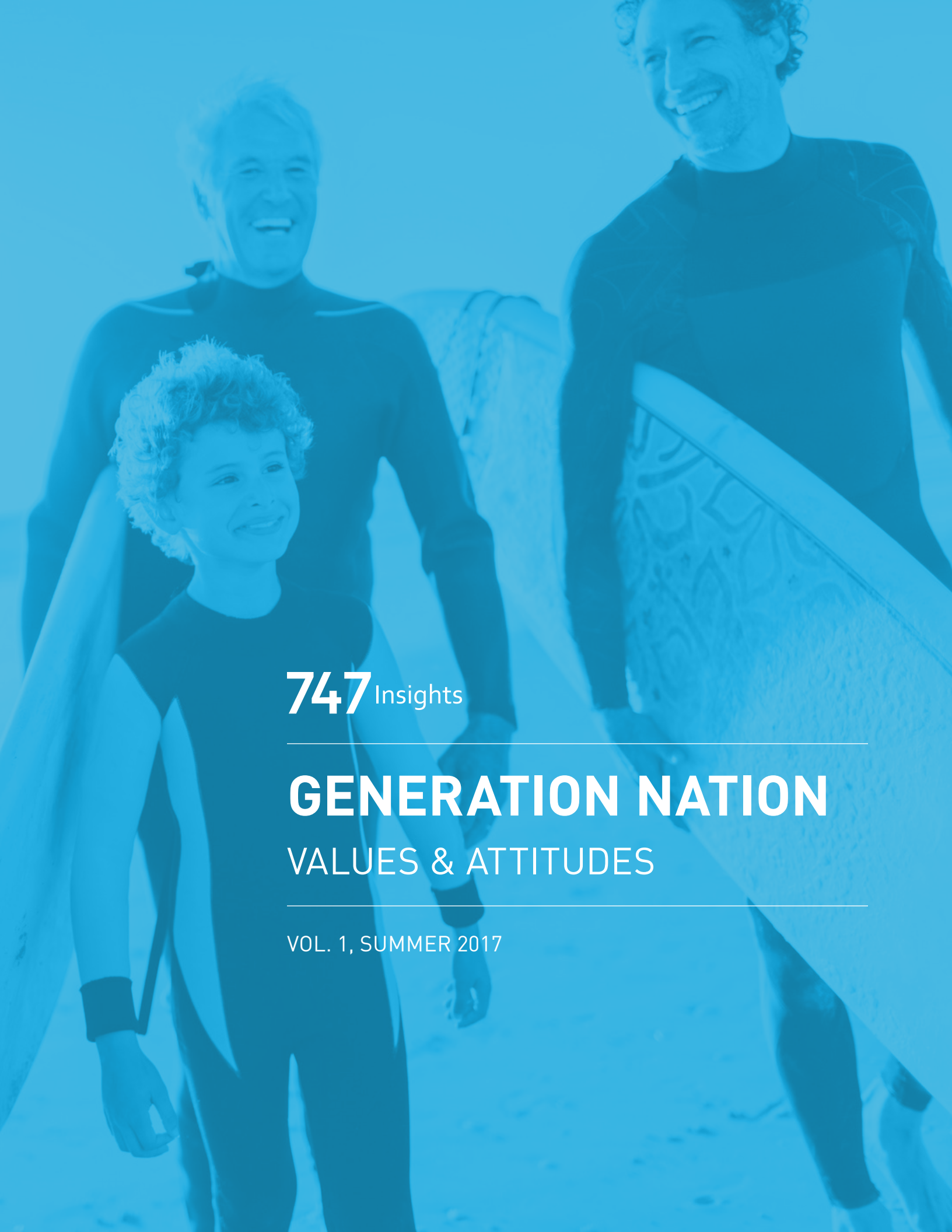




747 Insights

GENERATION NATION

VALUES & ATTITUDES

VOL. 1, SUMMER 2017

Foreword

In the proper context, “change” is one powerful word.

President Obama used “change” in not one, but two campaign slogans and, of course, it was the centerpiece of a “brilliant” Homer Simpson observation: “I guess some people never change. Or, they change and then quickly change back.”

The element and certainty of change was the impetus for “Generation Nation: Values & Attitudes.” And the point of this ambitious report — which deep dives in America’s big-four generations, Baby Boomers, Generation X, Millennials and Generation Z — is to not merely confirm that America is changing at a rapid pace, but to provide context around that change to develop a richer, fuller grasp of how change has impacted each generation. This knowledge is absolutely essential for marketers if they wish to remain relevant to the consumer base they depend on.

From our many years at TRU — the industry expert on young people — we understood teens (and their parents) like no one else. As Millennials and Gen Xers have grown, so, too, have we, and we’ve become deeply immersed in the lives and lifestyles of Baby Boomers and their Gen Z grandchildren, as well. We’re able to understand each in isolation and where they intersect with their younger or older cohorts, contextualizing each generation’s attitudes and values within the broader American population.

With all that in mind, it’s our pleasure and, we feel, our obligation, to give these four generations a proper voice and do so in a way that’s manageable and actionable for you.

And this is only the beginning. Soon, we’ll be introducing studies that dive more deeply into key verticals and categories (such as Multi-Cultural, Health, Retail & Shopping, among others). And yes, we’ll repeat the flagship “Generation Nation” study over time to track how things evolve or, shall we say, change.

In the meantime, enjoy the study!



Kate Danaj
KateD@747insights.com



Michael Wood
MichaelW@747insights.com

HOW THE REPORT IS ORGANIZED:

Key Findings

- An overview about the role of **Generation vs. Lifestage**
- **Generational profiles** highlighting what’s real vs. stereotypical
- **At-A-Glance summaries** with learnings across eight important facets of Americans’ lives, including:
 - Key charts and graphs supporting our findings
 - Whether they’re “walking the walk” by matching attitudes with behaviors
 - “Consider This” implications — thoughts on how to leverage learnings to better resonate with these generations
 - “Common Threads” — ways to span generations by targeting a common mindset

Detailed Findings

- With question-by-question analysis, charts and data tables

Generation Nation: Values & Attitudes

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Our Team

Editorial Team	Kate Danaj, 747 Insights	Design Lead	Oliver Pangborn, Pangborn Design
	Blair Fischer, 747 Insights	Design Assistant	Jill Kilcoyne, 747 Insights
	Ben Graham, Collaborata	Research Lead	Jeffrey Henning, Researchscape
	Michael Wood, 747 Insights	Project Consultant	Peter Zollo, Collaborata
Editorial Assistants	Darcy Heinrichs		
	Cassie Thompson		

About the Firm



747 Insights is a boutique research firm that helps businesses, associations, and educational institutions better understand and make meaningful connections with Boomers, Generation X, Millennials and Gen Z. Founders Kate Danaj and Michael Wood first collaborated as senior researchers at TRU, the pioneers in youth research. With more than 25 years' collective experience studying these cohorts, they reteamed to form 747 Insights. Together they bring a unique depth of generational expertise based on their vast experience consulting with the world's leading brands and organizations across numerous product and service categories.

In addition to the "Generation Nation" series of syndicated studies, 747 Insights also offers full custom research capabilities. The firm applies traditional and innovative approaches to both qualitative and quantitative research designs bringing fresh insights and a delightful client experience to every project.

Research Methodology



747 Insights collaborated with the experts at Researchscape International to field this study.

Researchscape surveyed 4,150 respondents using an online survey in order to better understand behavior, usage and attitudes among four generations (aged 13 to 71).

The survey was fielded from June 9 to June 19, 2017. Due to the length of the survey, respondents were randomly divided into two cohorts and each shown slightly more than half the questionnaire. The median time to complete the survey was 16 minutes

Respondents to the survey were recruited from a range of reputable sources. Respondents were quota-sampled using 72 different cells (gender by age by region) to closely match the overall national population of those aged 13 years old and up. The survey was fielded in both English and Spanish.

The analysis includes only those respondents who completed the entire questionnaire shown to them (based on answer validation, branching, and skip patterns). The survey results were not weighted.

Demographics

VITAL STATS	GEN Z	MILLENNIALS	GEN X	BOOMERS
Born	1998-2016	1981-1997	1965-1980	1946-1964
Age	under 19	20 to 36	37 to 52	53 to 71
Study composition	24%	26%	25%	25%
ETHNICITY	GEN Z	MILLENNIALS	GEN X	BOOMERS
White	43	56	65	75
African-American	16	15	11	13
Hispanic	22	17	15	8
Other	18	8	8	4
HOUSEHOLD INCOME	GEN Z	MILLENNIALS	GEN X	BOOMERS
Under \$50,000	↓ 42%	↓ 42%	46%	↑ 54%
\$50,000-\$99,999	34%	35%	34%	33%
\$100,000-\$149,999	↑ 15%	↑ 15%	12%	↓ 9%
\$150,000-\$199,999	4%	5%	4%	3%
\$200,000 or more	↑ 5%	4%	3%	↓ 2%
GEOGRAPHY	GEN Z	MILLENNIALS	GEN X	BOOMERS
Rural (under 2,500 people)	18%	↓ 16%	19%	↑ 22%
Suburban (2,500 - 50,000 people)	51%	↓ 43%	48%	↑ 52%
Urban (50,000 people +)	32%	↑ 42%	33%	↑ 26%
MARITAL STATUS	GEN Z	MILLENNIALS	GEN X	BOOMERS
Single	↑ 93%	↑ 57%	↓ 30%	↓ 16%
Married and living with spouse	↓ 4%	38%	↑ 52%	↑ 53%
Married but separated from spouse	↓ 1%	2%	↑ 4%	2%
Divorced	↓ 1%	↓ 2%	↑ 12%	↑ 21%
Widowed	↓ 1%	↓ <1%	↓ 2%	↑ 8%
SEXUAL ORIENTATION	GEN Z	MILLENNIALS	GEN X	BOOMERS
Straight	↓ 73%	87%	↑ 90%	↑ 94%
Gay or Lesbian	4%	3%	4%	3%
Bisexual	↑ 13%	7%	↓ 4%	↓ 2%
Transgender/Transsexual	↑ 3%	1%	1%	↓ <1%
Still figuring it out	↑ 8%	↓ 2%	↓ 1%	↓ <1%

Bold ↑↓ denotes positive/negative significance

Key Findings

Generation vs. Lifestage



THE GENERATION/LIFESTAGE RELATIONSHIP

Everything is just plain easier when there's an opportunity to distill enormous cohorts into a few choice attributes or sensibilities. When we do it by generation, it's considered a time saver or a necessary evil; when we do it by race, religion or ethnicity, well, it's more complicated. And we can also look at things by lifestage to see how people evolve and change as they move through the paths of their lives.

What we've learned in our Generation Nation deep-dive is that, while behavior and beliefs may be influenced by generations, *they're dictated by life stages*. In other words, how Gen Z is today is

just as Gen X would have been today had Gen Xers been born 35 years later. Yes, Boomers, don't kid yourself. If you were born 17 years ago, you'd be the ones glued to cell phones and social media. Mix and match all you like and you'll come to the same conclusion: generations are influenced by three primary factors—age, societal norms and technology.

Generations are influenced by three primary factors—age, societal norms and technology.

Let's start with age, because it's the most obvious:

Take Gen Z, for example. They're not thinking about marriage, they're not thinking about kids, they're not thinking about retirement. Cynics (and parents) might say they're not thinking at *all*. It's typical of this this pre-drinking age life stage when tweens' and teens' biggest concerns — schoolwork, hook-ups, acne — seem trivial to every generation but theirs. The same can be said of Boomers who, as the oldest generation (well, oldest for *this* study), have the greatest benefit of hindsight, and have a greater understanding about what's truly important (read: family) and what's not (read: buying stuff). Suffice it to say, with age comes maturity, just as with maturity comes career, with career comes family, and so on and so on. None of those things have been phased out over time (maturity *never* will) and with each comes a new set of responsibilities and awareness of how to deal with them.

Societal norms, too, are implicit. We're prone to laud Millennials and, now, Gen Z for how inclusionary they are, especially compared to Boomers, the only generation in this report to experience racial segregation firsthand. But younger generations' tolerance of other races, religions and ethnicities can be at least partly attributable to an increasingly heterogeneous population. In 1960, for example, 85% of the U.S. population was white; in 2011, 63% was; and, in 2050, it'll be just 47%. It wasn't a generational decision to make America more multicultural, just as it won't be a generational decision to socialize with different races as we approach 2050 — it'll be an imperative. Greater acceptance, too, of the LGBTQ community is a trickle down, with each generation discovering greater tolerance for differences in inverse proportion to how much faith Americans place in religion. Global and domestic challenges also greatly influence their growth and development. From burning draft cards in the 60s, to the race riots of the

early 90s, from 9/11 to the 2008 economic recession, these events influence our fears and worries as much as our hope, and even our shopping habits.

And then there's technology. This is where the change is the most dramatic. In 1960, nine out of 10 households owned, on average, *one* TV. Today, the average 10-year-old child stows the equivalent of a portable TV in their pocket, one that also makes calls, take pictures, plays pretty much every song ever, and essentially has the ability to immediately access all of human knowledge with a few taps. But if kid Boomers had the same unfettered access to the world the way Gen Z does today, you can bet their 401Ks they'd take it and wouldn't look back. Remember Gen X spending hours at arcades, throwing their allowances on Galaga, Centipede and Pac-Man one quarter at a time? You can be certain they'd be playing Color Therapy, Neko Atsume and Pokémon Go on their phones instead had it been an option. Don't blame Gen Z for their gnat-ish attention spans. Hop in the DeLorean and tell a Gen X teen that, one day, instead of spooling microfiche for hours on end, they'll be able to type the "War of 1812" into a handheld device they own and they'll get 32 million results instantaneously. In other words, the only things separating generations' skillfulness with digital technology is their age of introduction, nothing more.

Thirty years from now, when you've purchased your 30th Generation Nation (*hint, hint*), we'll be talking about how Millennials, once big spenders, are now frugal, and don't care that you can buy and have a custom-made living-room set delivered to them in under an hour using only the microchip implanted in grandma's head. And Gen AA? They'll just be hiking through the foothills of Peru's Colca Canyon in the privacy of their augmented-reality rooms, making all the Millennial curmudgeons (who are still struggling to figure out this new technology) jealous.

Generational Profiles

GENERATION Z (1998 TO 2016)

Still in the prime of their youth, it remains to be seen how this generation will evolve over time as they mature and as society changes. However, as many came of age during the first African-American President's tenure while amongst the most diverse group of Americans in the country's history, they're the most accepting of diversity and challenge deep-seeded social inequities. And because they're the first generation born entirely post-internet, they can't remember a time when content wasn't immediately available, and they don't remember life without mobile technology, YouTube or... what's a landline?! Generation Z-ers have been glued to small screens since they were old enough to swipe and, if they're forced to watch TV, have trouble reconciling "live" programming that you can't fast forward. This type of unfiltered access helps accelerate their ascent into young adulthood and allows them a global perspective on hot topics that were once solely shaped by their friends and family. They are also more vulnerable to deceptive and fake news since they have not had experience reading traditional news coverage.

- They're upbeat, brimming with ideas, brand-ambivalent and ready to shake up the system.
- They care little about political parties, and national borders, preferring to look at the world from a global, as opposed American perspective.
- This generation is all about streaming, time-shifting and Snapchat. Well, YouTube, too, but we wanted to keep alliteration alive. So smitten with YouTube (they've spent more time on it this year than any other generation), they're ignoring TV shows and movies for the snack-sized videos portioned for their short attention spans.



GENERATION Z

VITAL STATS	GEN Z
Born	1998-2016
Age	under 19
Study composition	24%

ETHNICITY (%)	GEN Z
White	43
African-American	16
Hispanic	22
Other	18

MARITAL STATUS (%)	GEN Z
Single	93
Married and living with spouse	4
Married but separated from spouse	1
Divorced	1

EMPLOYMENT STATUS (%)	GEN Z
Employed full-time	8
Student	73
Self-employed	6
Employed part-time	12
Temporarily unemployed	7



- In keeping with the multi-cultural evolution of gen pop, their friends come in all colors and sexual orientations, and many of them they've never met. And while much has been made about the ethnic diversity of this generation, it's notable that only 73% currently consider themselves straight, 13% bisexual and 8% are "still figuring it out." Other recent studies have actually placed the number of fully straight members of Gen Z as low as 48%. But for them, diversity is normal so they don't consider the concept of diversity in of itself cause célèbre like the Millennials.
- There's some exuberance inherent to this life stage, but lots of cynicism too: They think the economy is getting worse, and the country is headed in the wrong direction, but they're not fazed by either. And, though they're on social media, they don't think it's bringing the world together; if anything, it's achieving the opposite.

MILLENNIALS (1981 TO 1997)

Most Millennial descriptors no young person would consider emphasizing on a job application. Derided as “The Me Me Me Generation” in *Time* magazine, they’re considered lazy, entitled, spoiled, disillusioned, insular and have no idea why he or she is calling when they could just *text* the information. Patience isn’t a virtue, although praise for a job well done (like earning trophies just for showing up), most certainly is.

- Even though the economy implosion hit them at their most vulnerable lifestage, they’re incredibly resilient, optimistic, and are making the most of all parts of their life.
- They believe in being socially conscious, are inclusive of all lifestyles, and embrace adventure and new ideas with aplomb.
- There’s a swagger about Millennials that some might say borders on arrogance. This generation has seemingly ceaseless energy and an enthusiasm for life that’s downright contagious. In fact, they’re the highest in their belief in working hard and playing hard (80%).
- They’d rather text than talk on the phone, but so, too, would Gen Zers and Gen Xers, and where do you think they got *that* from?!
- And lazy? They work harder and more hours than *every other generation* at jobs they love, and see little separation between work and personal life.
- They do expect all that work will pay career dividends and earn them the giant paychecks they crave. Just make sure the company signing the checks has a social conscience (63% say it’s important to work for a company that gives back to the community), because they expect their employer and their peers to make the world a better place in which to live.
- While they may have bristled with their parents’ helicopter-style of childrearing, three-quarters say they enjoy spending time with mom and dad.



MILLENNIALS

VITAL STATS	MILLENNIALS
Born	1981-1997
Age	20 to 36
Study composition	26%

ETHNICITY (%)	MILLENNIALS
White	56
African-American	15
Hispanic	17
Other	8

MARITAL STATUS (%)	MILLENNIALS
Single	57
Married and living with spouse	38
Married but separated	2
Divorced	2

EMPLOYMENT STATUS (%)	MILLENNIALS
Employed full-time	50
Student	14
Self-employed	10
Employed part-time	11
Temporarily unemployed	12
Stay-at-home mother or father	8



- And while safe spaces and trigger warnings have invaded many college campuses, Millennials are more open and accepting of differing ideas than other generations.
- Their childhoods full of self-esteem have led to adults full of self-esteem. Millennials believe more than any other cohort that their generation will impact the world for the better. And, also more than other cohort, they consider themselves really good-looking. This confidence is why they are ambitious, passionate, optimistic and so willing to help others.

GENERATION X (1965 TO 1980)

It's appropriate that Generation X co-opted its moniker from the 1991 novel "Generation X: Tales for an Accelerated Culture," a book that connected with the cynicism, ire and rebelliousness that became synonymous with this cohort, and famously depicted in John Hughes films and MTV music videos. They began as Cabbage Patch Kids-collecting, Atari-playing, Hacky Sack-kicking, scrunchies-wearing latchkey kids who matured into fun-loving creative types with an appetite for money, and willingness to finesse their rebellion into ground-breaking solutions.

- Whatever drove Generation X to challenge authority, make cereal an every-meal-entrée, and generally lust life seems to have evaporated somewhat with age. Gen Xers are the middle child between Boomers and Millennials, which, we know, makes sense. They're at that mid-life time in their lives where they're heads-down, getting things done, and realizing that life is harder than they thought.
- No longer the happy-go-lucky rebels of yesteryear, this cohort is stressed — in fact roughly 30% say they're very or extremely so (higher than any other generation). Stressed about a wide range of things — saving for retirement, the economy, the direction of the country, fending for their families, etc.
- But, they're not listless, either. They like to shop and are not easily enamored by expensive brand names, in fact 80% are open to buying clothing from mass merchandisers.
- And while Boomers may have labeled them slackers back in the day, Xers represent a larger percentage of the workforce than the older cohort now.
- Despite how they may have been perceived, only one in five consider themselves skeptical today.
- They envy Boomers' worry-free repose and, also, the glass-is-half-full enthusiasm of Millennials.



GENERATION X

VITAL STATS	GEN X
Born	1965-1980
Age	37 to 52
Study composition	25%

ETHNICITY (%)	GEN X
White	65
African-American	11
Hispanic	15
Other	8

MARITAL STATUS (%)	GEN X
Single	30
Married and living with spouse	52
Married but separated	4
Divorced	12
Widowed	2

EMPLOYMENT STATUS (%)	GEN X
Employed full-time	8
Student	73
Self-employed	6
Employed part-time	12
Temporarily unemployed	7
Stay-at-home mother or father	1
Other	2

BABY BOOMERS (1946 TO 1964)

Baby Boomers were the first generation to earn a name and became the largest in American history. Defined as outspoken rebels willing to shake things up, speak out, and burn their bras for their beliefs, they were the first generation to push back against the power of the American war machine while protesting for peace and civil rights. But not everyone was a Woodstock-going hippie back then. There was a “Silent Majority” who helped elect Richard Nixon. Plenty of Boomers took a straighter path, while holding onto some fairly “traditional” beliefs about equality, race, religion, and the future. Even today, Boomers are still (if not more) complex and nuanced — often shaped by how they’ve adapted (more or less) as they settle into their golden years.

- While they’re no doubt feeling their age, they still want to make the most of it — paying attention to their health and well-being so they can enjoy their longer lives.
- They realize that culture has become increasingly impersonal, but will do anything to stay connected with their kids (even if they prefer getting a phone call once in a while).
- They’re disciplined and hard-working yet also feel the pressures of age discrimination and don’t sweat much about catching up on work from home.
- They may not have enjoyed much fun and laughter with their parents, but they’re truly enjoying experiencing life with their grown kids (and grandkids!).
- While 42% are retired, others aren’t quite ready to hang up their hat — either because their finances aren’t where they need to be or they’re exploring other opportunities or passions. Bottom line is that they’re not sitting idle — except when they’re trying out a new restaurant.



BABY BOOMERS

VITAL STATS	BOOMERS
Born	1946-1964
Age	53 to 71
Study composition	25%

ETHNICITY	BOOMERS
White	75
African-American	13
Hispanic	8
Other	4

MARITAL STATUS	BOOMERS
Single	16%
Married and living with spouse	53%
Married but separated	2%
Divorced	21%
Widowed	8%

EMPLOYMENT STATUS	BOOMERS
Employed full-time	26
Retired	42
Self-employed	7
Employed part-time	10
Temporarily unemployed	6
Stay-at-home mother or father	4
Other	7



- Even though they are the most ethnically homogenous generation, they do split more than the other generations when it comes to some of their core values, such as their views on diversity, inclusion, and climate change.
- They prefer watching TV where it belongs — on a TV — but aren't opposed to more newfangled sources like YouTube and Netflix.

At-A-Glance Summaries

Money & Spending

TAKE IT TO THE BANK

Early in a new presidential administration, **there's cause for both optimism and skepticism as it relates to our nation's economy.** Although optimism is high, we often hear people in qualitative research express concern for how long the economic improvements will last. This sentiment is echoed in this study, with people of all ages, especially Boomers, concerned about the U.S. economy. Gen Z, not surprisingly, is the least concerned, as many wouldn't remember the housing-market crash or even be familiar with the idiosyncrasies that drive or stall economic growth.

But Boomers have seen this movie before, inclusive of the Great Recession of the aughts, the 1973-75 recession and early '80s recession, and are in no mood for a sequel this late in their lives. **Retirement is a major source of concern, especially among Generation X, however few are doing much about it.** And with another looming healthcare overhaul that impacts 1% of the U.S. economy, people's economic worries continue to remain front and center.



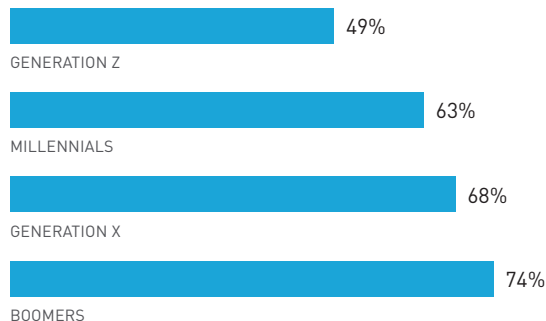
CONSIDER THIS

Overall, consumers are no doubt interested in making sound buying decisions and are increasingly studious and careful shoppers.

Brands that can provide consumers a level of stability and trust will likely earn their business.

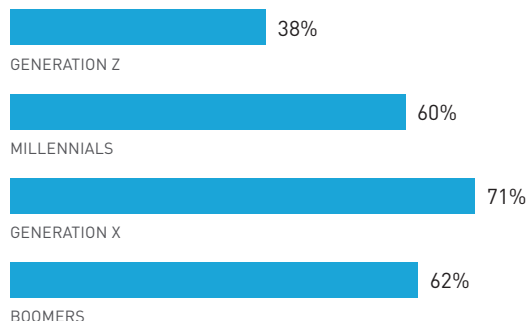
I'M PERSONALLY CONCERNED ABOUT THE U.S. ECONOMY

TOP-TWO BOX



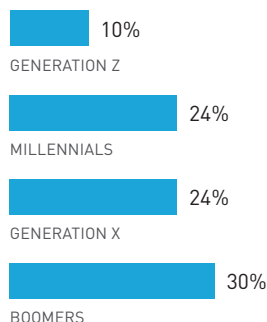
I WORRY ABOUT NOT HAVING ENOUGH MONEY FOR MY RETIREMENT

TOP-TWO BOX



I'M CURRENTLY SAVING FOR RETIREMENT

TOP-TWO BOX



AFFORD FOCUS

Interpreting the four generations’ dispositions regarding finances is like interpreting how we see the glass, half full or half empty. On the one hand, only around one-third of all generations are unhappy with it; on the other, about the same percentage is happy with it. Few are going to complain they have too much money at their disposal, just as few have enough money to live the lives they want versus the ones they need. At a more granular level, money means different things to different generations: for Baby Boomers, for example, it’s about earning just enough to make retirement a sooner-than-later, stress-free reality; for Gen Z, it’s about having enough to afford fast food, fast fashion and, at worst, a fast-charging phone. And, of course, so much of Gen Z’s finances are reliant on the state of their Millennial and Gen X’s parents’ bank account.

HAPPINESS WITH CURRENT FINANCIAL SITUATION (%)

TOP-TWO BOX

	GEN Z	MILLENNIALS	GEN X	BOOMERS
Happy	36	36	36	35
Middle	35	28	28	29
Unhappy	29	36	36	36

Fortunately, there’s less ambiguity with regards to consumers’ spending outlook as compared to last year. With job numbers remaining fairly robust and the stock market trending upward, it’s heartening to see that only one-quarter of Americans expect to spend less this year than they did last. This attitudinal measure gets to how consumers generally feel about their own financial health and stability.

A look at future spending reveals that it’s Millennials who expect to spend significantly more than fellow generations in the next year (and we hear a collective “phew!” from marketers). For now, this isn’t an anomaly. Saving money isn’t (yet) a high priority for Millennials, which means more today than it did, say, 15 years ago, now that the oldest ones are around 40 years old and, seemingly, old enough to know better. Earlier this year, one

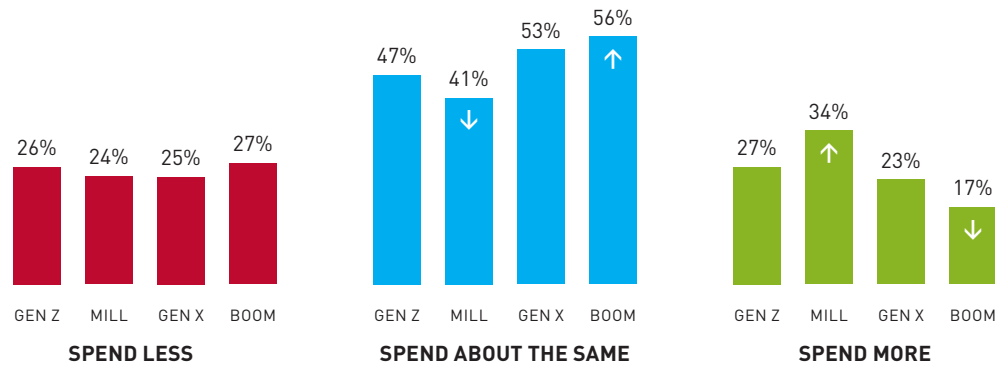
story went viral that Millennials spend more money each year on coffee than they put in their savings. While not exactly “fake news,” it made some generalizations about Millennials’ dining-out habits that fed the narrative. The real takeaway in a study conducted by Bankrate.com was that Millennials dine out, on average, five times a week, and three in 10 buy brewed coffee at least three times a week.

For Gen Z, it’s about having enough to afford fast food, fast fashion and, at worst, a fast-charging phone.

Sure, dining out that often may seem indulgent, but it’s not fully indicative of Millennials’ spending habits. More so than other generations, Millennials are precocious consumers, relying on blogs and peer reviews on potential purchases and favoring value over convenience when considering pulling the trigger.

Millennials enjoy their material possessions, but also prefer to save money through the gig economy and most want their purchases to benefit more than corporations’ bottom line. This is the first generation to truly put a priority on altruism as it relates to commerce. In fact, a recent Accenture study revealed that 75% of Millennials said it’s important that a company gives back to society instead of just turning a profit. Philanthropic brand TOMS first struck a chord with college students more than a decade ago with their “one-for-one” campaign and, more recently, Starbucks agreed to hire 10,000 refugees worldwide in the wake of President Trump’s travel ban. Though the latter example alienated some consumers, it also tapped into the inclusivity and tolerance of the independent-and-Democrat-leaning Millennial generation who, as we already learned, love coffee.

SPENDING OUTLOOK: THIS YEAR VS. LAST



Bold ↑↓ denotes positive/negative significance

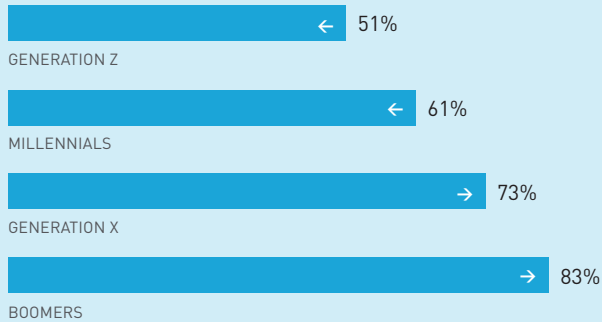
None of this, however, means Millennials have some secret stash: The average Millennial has \$30,000 in student loans and the median Millennial net worth is a mere \$10,400, according to The College Investor. Further, according to Pew, **more than a million Millennials are becoming new moms each year, which means fewer triple Venti, soy, no foam lattes, and more Enfamil Gentlease Infant Formula Powder tubs.** So it's no surprise that half of Millennials (and Gen X) are worried about the amount of debt they owe. This worry to not only make ends meet today and pay back loans from

yesterday exaggerates their worry about saving for retirement tomorrow. Six in 10 Millennials (and 71% of Gen X) are currently worried that they won't have enough money for retirement. In fact, only 24% are currently saving for their golden years.

It's heartening to see that only one-quarter of Americans expect to spend less this year than they did last.

BUYING EXPENSIVE, DESIGNER CLOTHING BRANDS IS OVERRATED

TOP-TWO BOX



Bold → ← denotes positive/negative significance

BUT DO THEY WALK THE WALK?

Millennials love to shop. But it does seem like the 60% of them who are worried about their debt or future savings also consider themselves prudent with their money. With many economic vagaries out of their hands, Millennials are trying to thread the needle — live a comfortable lifestyle today while worrying and (some) planning for tomorrow.

For Boomers, purchases have significantly less appeal. It's a case of been there done that, and they naturally approach spending in a pragmatic way. They're not about accumulating possessions but, rather, experiences. AARP estimates Boomers spend more than \$120 billion yearly on leisure travel, and that nearly all Boomers (99%) planned to travel in 2016.

The vast majority of consumers expect to spend the same or more online next year as they did this year.

SPEND THE SAME OR MORE ONLINE NEXT YEAR

TOP-TWO BOX



Boomers, like all generations, are ensconced in e-commerce, as it's no longer conjecture, but a certainty that the future of shopping will be online (you've all seen the Sears, Macy's, Kmart and JCPenney store closings and vacant strip malls). The NRF predicts that online retail will grow 8-12% — up to three times higher than the growth rate of the overall retail industry. The proliferation of online grocery shopping will be a major boost for e-commerce, with Walmart and Kroger already joining the fray, along with Amazon, which recently purchased Whole Foods. According to The Digitally Engaged Food Shopper, around one-quarter of American households buy some groceries online (up 19% since 2014), and more than seven in 10 will buy food online within the next decade. The online channel simply shows no sign of slowing down. The vast majority of consumers expect to spend the *same or more online* next year as they did this year.



CONSIDER THIS

Given the propensity for buying online, all generations — predominantly mall-going Xers — generally prefer to shop in physical stores where they can actually see the items. With new showroom model retailers being piloted, consumers will likely appreciate the availability of more hybrid digital/physical shopping options. Further, more stores are reimagining the experience of shopping at brick-and-mortar locations to compete with the facility of online shopping. That means giving potential customers a shopping excursion with a cherry on top. Success stories include back-to-school in-store parties at Meijer (dubbed Meijer Mania), at Lululemon, where yoga classes are available, or even the Nike store in New York’s SoHo, which features a basketball half-court/“trial zone” where customers can play, and fitness-lounge-inspired fitting rooms.

All generations — predominantly mall-going Xers — generally prefer to shop in physical stores where they can actually see the items.

HOW MUCH DO YOU AGREE OR DISAGREE? (%)

TOP-TWO BOX

	GEN Z	MILLENNIALS	GEN Y	BOOMERS
I read user reviews about products before making a purchase.	61	67	61	48
I don't really pay attention to advertising.	45	39	39	42
I watch video user reviews about products before making a purchase.	44	48	35	20
I trust what companies say in their marketing or advertising.	18	33	30	16
I post my own product reviews.	15	31	26	12

WHERE DO YOU PREFER TO SHOP (%)

WEIGHTED TOTAL

	GEN Z	MILL	GEN X	BOOM
Physical stores where you can see the item	↑ 67	↓ 53	↓ 56	64
Online stores	↓ 33	↑ 47	↑ 44	↓ 36

Bold ↑↓ denotes positive/negative significance

When it comes to what *encourages* folks to buy, we can’t forget that more than half of Americans — and more than 60% below Boomer age — read user reviews or watch user-generated videos about products before making a purchasing decision. Consumers trust other people *like them*, who have used the products or services for a significant period of time and have no inherent bias. This, of course, has catapulted the number of brand ambassadors out there — via vlogs, social media slideshows, street teams and more — who can connect your brands to their accepting audiences. Even podcast hosts, who are able to often more intimately connect with their viewers than on other mediums, **read ad copy that reflects their personal and almost-authentic experience with a product.**

JUST DID IT

When asked to write in three of their favorite brands, Nike is easily Americans' favorite overall, earning the top spot among all generations but Baby Boomers, where it ranks just behind Levi's. It's hardly surprising that the athletic apparel brand is tops among Gen Xers, as the "Just Do It" slogan and explosion of designer sneakers began when they were kids. That Nike is tops among Millennials

and Generation Z speaks to younger consumers' investment in quality lifestyle/fitness brands that come with a professional athlete's endorsement.

And with the mobile phone being an indispensable part of consumers' everyday lives, it makes sense that two of the top brands here are Apple and Samsung.

FAVORITE BRANDS (%)

GEN Z		MILLENNIALS		GEN X		BOOMER	
Nike	11.3	Nike	8.9	Nike	7.2	Levi	5.4
Adidas	5.0	Adidas/Amazon	3.8	Levi	4.3	Nike	3.9
Apple	3.2	Apple	3.6	Amazon	3.0	Apple	3.2
Pink/VS	2.8	Samsung	2.7	Apple	2.5	Amazon/ Samsung	2.4
Forever 21	2.7	Walmart	2.3	Samsung	2.3	Walmart	1.9
American Eagle	2.2	Target	2.2	Sony	2.0	Wrangler	1.7
Hollister/ Vans	2.1	Sony/Pink	1.8	Adidas/Polo/Walmart	1.8	Hanes	1.5
H&M	2.0	Old Navy	1.6	Under Armour	1.6	Polo/Lauren	1.4
Amazon/ Converse	1.8	Levi	1.6	Old Navy	1.3	Adidas/Coach/LG/MK	1.1
Under Armour	1.7	Polo/Lauren	1.5	Wrangler	1.2	Coke/Under Armour/Lee	0.9
Sony/ Microsoft	1.6	Forever 21/ GAP/Jordan	1.3	GAP/Target	1.1	Sony	0.8
Hot Topic/ Target	1.4	Google/Under Armour	1.2	Coach/Dell /MK/Hanes	0.9	LLBean/ Target/Toyota	0.7
Nintendo/ Samsung	1.3	Gucci/Puma	1.1	Kohl's	0.7	New Balance/Pepsi/Reebok	0.7
Aeropostale/Walmart	1.2	ebay/Hollister	1.0	Gucci	0.6	HP/Calvin Klein	0.6
Jordan	1.1	American Eagle	0.8	American Eagle	0.5	GAP	0.5

COMMON THREADS

GENERATION Z • MILLENNIALS
GENERATION X • BABY BOOMERS

Online
buying is a
given — all plan
to buy the same or
more online in
the future

Beloved big-tent
brands still have
broad appeal

Family & Relationships

AWE IN THE FAMILY

“The only rock I know that stays steady, the only institution that works, is the family.” That bit of wisdom was offered by auto titan Lee Iacocca and, while there are many high-profile endorsements of family, his has a very research-y tenor. Regardless of the passage of time and sometimes glaring disparities across generations, **family remains one of the most important parts of people’s lives.**

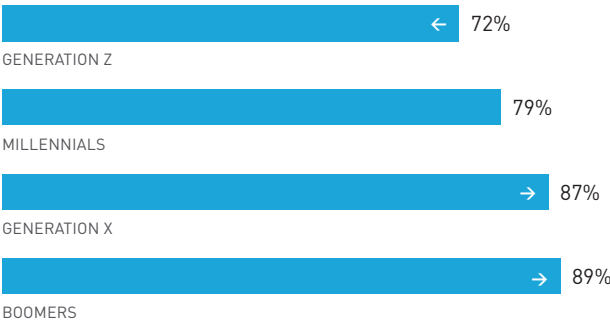
In a world of constant (and often disruptive) change, all four generations see family as—like Iacocca said—a *rock*. **Family is the one thing that’s always been there, that they can’t remember living without and that they can almost always count on to offer strength and compassion.** And, as we age, the more important family becomes; this isn’t about generations, it’s about life stage: Baby Boomers, in particular, are faced with seeing most of their lives in the rearview rather than in front of them, and often live vicariously through their progeny filled with children and grandchildren.

Across all generations, Americans are content with the support and advice that their parents provide. Even Gen Xers, whose generational identity was shaped by *laissez-faire* parenting in the ‘80s, agree that family dinners, chores, help with homework, and knowledge of one’s school and social-life played an important role in developing strong family bonds. Now in their 40s and 50s, Gen Xers enjoy spending time with parents more so than all other generations, as they see this chapter in their lives coming to a close.

Generation Z is likely to replicate this heightened desire to spend time with parents as they age and no longer take their own nurturing for granted. Overall, most parents (mothers more than fathers) think they are doing a “good job,” regardless of generation. Right now, Gen Zers—though still enjoying time with family—are entering the teen and young adulthood years and triaging family time with friends, significant others and other so-called distractions (read: digital and social media).

AGREE: FAMILY IS THE MOST IMPORTANT THING IN MY LIFE

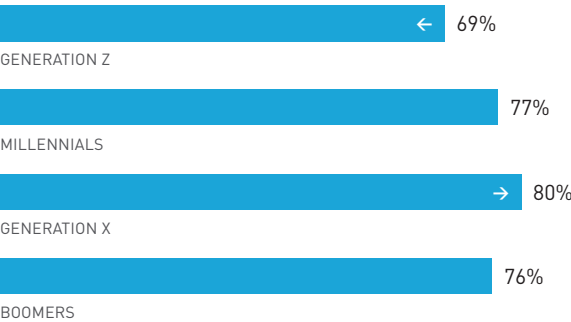
TOP-TWO BOX



Bold →/← denotes positive/negative significance

AGREE: I ENJOY SPENDING TIME WITH MY PARENTS

TOP-TWO BOX





CHILDHOOD AND PARENTING

While Boomers grew up under the watchful eye of their parents, each subsequent generation has gained a longer leash and more traditional family occasions are lost due to busy and conflicting schedules. While 84% of Boomers ate meals regularly with their families, that number drops to only 52% of Gen Z. Afterschool practices, homework, work and other obligations often relegate this once time-honored tradition to the back-burner. Parents are also busier, as there are more single-parent households and homes with two working parents, or parents who are working two jobs.

Millennials, have a complex relationship with their “helicopter” parents. Almost half (47%) of Millennials received homework help from their parents, compared to 29% of Boomers, 40% of Xers and 26% of Gen Z. And one in five Millennials have a parent who has lied in the past in order to get them out of an assignment at school. A full quarter of Millennials claim that they live with two people who they consider their friends more than parents. A higher percentage of this generation, (62%) claim that they “have lots of fun and laughter” with their parents, compared to the other three generations. But 38%—also higher than the other three generations—claim that they would “often get mad and yell at each other.” So they have a closer, more intense, involved relationship than all other three generations, for better or for worse.

Parents of Gen Z seem, according to their children, to be pretty chill. Fewer than half have parents who follow through with discipline if they break the rules, compared to 59% of Millennial parents. Only 30% of this generation say their parents are strict, compared to 40% for Millennials and Gen X and 47% for Boomers. While these numbers may shift as this generation ages—and as many people wax nostalgic on their younger years—we still see an important difference in how parents of Millennials and Gen Z build their families. Some of this does have to do with the demographic shift in Gen Z.

And Gen X? Just a big John Hughes movie full of latch-key kids? That’s not fully how they remember it. Families in the 1980s modernized—resulting in decreased parental involvement and family time that sent some shock-waves through communities over this fast-changing dynamic. Only 57% of Gen Xers say that their parents were home after school, compared to 70% of Boomers.

People worried that this generation, growing up away from the watchful eye of adult supervision, would mark the beginning of the end of traditional family values. And as we’ve noted, there has been a shift in parenting styles over the generations, but it seems that parental involvement in their Gen Z kids’ lives did not totally continue to decline. Gen X, Millennials and Gen Z had the same percentage of parents at home when they returned from school. While only 29% of Boomers received homework help, 40% of Xers did. And 70% of Xers regularly had dinner with their families. So if parents were home less often, they still participated in their children’s daily lives.

THINKING ABOUT YOUR CHILDHOOD, HOW OFTEN DID THE FOLLOWING HAPPEN IN YOUR FAMILY LIFE? (%)

TOP-TWO BOX

	GEN Z	MILLENNIALS	GEN X	BOOMERS
We regularly ate meals together as a family.	↓ 52	↓ 64	70	↑ 84
My parent(s) followed through with discipline if I broke the rules.	↓ 48	↓ 59	67	↑ 80
At least one of my parent(s) was usually home when I came home from school	↓ 57	↓ 57	↓ 57	↑ 70
We had lots of fun and laughter.	56	↑ 62	↓ 55	59
My parent(s) helped me with homework.	↓ 26	↑ 47	40	↓ 29
My parent(s) acted more like friends than parents.	19	↑ 25	22	↓ 11

Bold ↑↓ denotes positive/negative significance

LOVE AND MARRIAGE

The virtual world is a major source for love connections — with paid sites like Match.com and eHarmony still going strong. Consumer Reports (Fall 2016) found that nearly half, or 44%, of those who tried online dating said it led to a serious long-term relationship or marriage. And the explosion of free sites like Tinder, Grindr and Coffee Meets Bagel make dating — and especially hooking up — just a swipe away.

As the years go by, we continue to see an evolution or, perhaps, devolution in the concept of marriage (depending on your perspective). Though most generations still consider it important — all but Generation Z, who see it as too far off, too adult — it's no longer the rite of passage it once was. According to the Pew Research Center, the number of adults in the US who are married has been steadily declining for decades. In 2014, just 50% of Americans were married, down from 72% in 1960. Clearly, the rise of social media and dating apps has increased the potential for more relationships, which is leaving men and women on the market longer or even indefinitely. Consequently, the average age of the first marriage continues to climb: In 2005, the average man and woman married at 27 and 25, respectively — two full years younger than just two years ago. At the same time, there remains a grass-is-always-greener mentality to settling down: the

majority of generations say it's better to have one life partner than many, and just one quarter says “tying the knot” isn't as great as people think.

The majority of generations say ‘tis better to have one life partner than many, and just one quarter says “tying the knot” isn't as great as people think.

Interestingly, it's Baby Boomers who see marriage as less important than Millennials and Gen Xers. Is it because they married too early (mostly in their early 20s) or does the benefit of hindsight have them reevaluating the value of the institution? It's something to watch as the average marrying age increases and the perception of getting hitched changes.

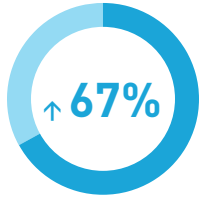
As societal norms have changed with a broader shift towards acceptance, diversity has become a more common part of romance and friendship. In many ways, it's a demographic imperative as just 52% of Americans under 18 are white, compared to 75% of Baby Boomers, according to 2016 Census Bureau Estimates. Following suit, more than four in five Gen Zers have at least one

AGREE: MARRIAGE IS IMPORTANT TO ME

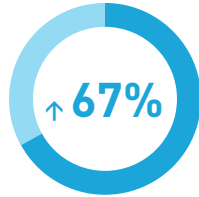
TOP-TWO BOX



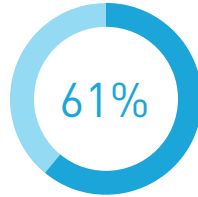
GENERATION Z



MILLENNIALS



GENERATION X



BOOMERS

Bold ↑↓ denotes positive/negative significance

friend of a different race than themselves, a reality that would be alien to Baby Boomers when they were at that life stage (in 1970, about one in 100 Americans were Hispanic; today, one in five are). Further, roughly half of Americans have friends of a different sexual orientation. Not surprisingly, open-mindedness and inclusion are most pronounced among our youngest and most diverse generation.

In terms of romantic relationships, we're seeing more acceptance of diversity across all generations, as one-third say they've dated someone of a different race. And the number of interracial marriages in the U.S. has continued to increase each year.

More than four in five Gen Zers have at least one friend of a different race than themselves.

I HAVE DATED SOMEONE WHO IS OF A DIFFERENT RACE THAN ME

35%

GENERATION Z

43%

MILLENNIALS

39%

GENERATION X

29%

BABY BOOMERS

I HAVE ONE OR MORE FRIENDS WHO ARE OF A DIFFERENT RACE THAN ME

81%

GENERATION Z

69%

MILLENNIALS

67%

GENERATION X

71%

BABY BOOMERS



COMMON THREADS

GENERATION Z • MILLENNIALS • GENERATION X • BABY BOOMERS

Strong
importance of
family and friends

Preference to
share one's life
with a partner
(vs. having multiple
partners)

Acceptance
of diversity
with dating
relationships

Enjoyment
of spending
time with parents
(albeit less so
among Gen Z)

Technology & Media

THE IPHONES HAVE IT

A few years ago, Huffington Post reprinted a 1991 Radio Shack ad that featured 15 then-staple items available for sale. Among those 15 items — inclusive of an AM/FM clock radio, micro-thin calculator, VHS camcorder, and \$159.95 deluxe portable CD player — 13 (!) of their functions can now be accomplished, and so much better, with a single mobile phone. The point of the post was not to point out how much money we wasted in the early '90s, but to demonstrate the taken-for-granted, otherworldliness of the smartphone.

It wasn't that long ago that the smartphone was still considered a luxury item; in fact, there are nearly four times as many smartphones in use today than there were just seven years ago, according to Statista. And owners of mobiles get younger every year. According to Influence Central, kids are getting their first smartphone around 10 years old — three full years before most are technically allowed to join most social-media sites. Generation Z was literally born into the world of taps and swipes. In fact, if there was an early ambassador for the generation, it would have been the one-year-old child featured in a 2011 viral video swiping a magazine's pages, errantly believing it was an iPad.

Today's parents view smartphones as a necessary evil — it's a GPS-enabled connection to their kids, an assurance of their well-being, an e-reader, a status symbol, and a window into the world at large (for better or worse). Yes, in qualitative research, we hear that schools increasingly allow students to replace their laptops with phones which, in and of itself, helps to justify the purchase of an iPhone or Android device.

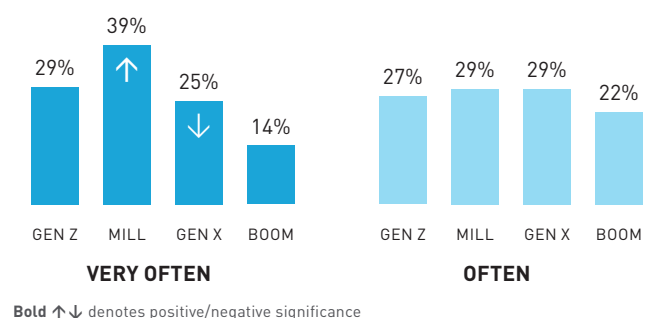
FOMO FOR THE WIN

Of course, most generations would admit school or work are the furthest things from their minds when they're tapping and swiping away. Increasingly, social media is the first and last thing generations — especially younger ones — access each day. **More than half of Gen X and younger say they're on social-media very often/often and that it's an important part of their daily lives.** Here, the definition of "important" gets a social-media makeover. Indubitably, exercise, eating right, and spending time with friends and family are all important; but by comparison, logging on to Instagram to see a photo collage of an acquaintance's pub crawl, rather, is not. It's FOMO — fear of missing out, and increasingly that's what social-media users are trying to avoid, and *that's* important. Remember, these younger generations place much

SMARTPHONE OWNERSHIP



HOW OFTEN DO YOU POST ON SOCIAL MEDIA



ATTITUDES ON SOCIAL MEDIA (%)

TOP-TWO BOX	GEN Z	MILLENNIALS	GEN X	BOOMERS
Social media is an important part of my life.	49	↑ 61	↑ 54	↓ 33
Social media is too public and what people post might come back to haunt them.	↓ 57	↓ 58	67	↑ 77
Social media takes up too much time.	52	↑ 54	49	↓ 46
Social media shows an overly positive view of people's lives.	42	↑ 55	46	↓ 31

Bold ↑↓ denotes positive/negative significance

more value in experiential activities. So for many, social-media feeds end up displaying missed opportunities, punctuated by the fear of regret.

We know from qualitative research and this data that there's a "darker side" to social media. **Indeed, roughly half of people across all generations believe that social media takes up too much of their time and worry that what people post will come back to haunt them.** A recent study published by the Data & Society Research Institute revealed that 47% of Americans have been victims of online harassment and there are now laws against "revenge porn" in 38 states.

Social-media feeds end up displaying missed opportunities, punctuated by the fear of regret.

Perhaps the biggest and most widespread pitfall of social media is the curated, skewed portrait of users' lives. The consequence is an arms race, where users try to one up one another with the frequency, quality, and impact of their posts to proffer the illusion that their lives are more perfect than others. It's a chore that didn't exist 15 years ago, and one that invariably invites more stress than joy. **In fact, roughly two in five Gen Z and Millennials say they care about the number of "likes" and shares they receive as well as the number of friends and connections.** There is a gender divide with social media usage as well. More women (45%) post regularly compared to men (37%). Women (68%) look at other people's posts much more regularly compared to men (58%). Further, a recent study conducted by the University of Pittsburgh Center for Research on Media, Technology, and Health concluded that

people who reported using between seven and 11 social-media sites had more than triple the risk of depression and anxiety than those who used two, one or none. For a generation that craves authenticity, Millennials are at the forefront of curating inauthentic online versions of themselves while immersing themselves in the curated lives of others.

This, of course, has led to the rise of Snapchat. Snapchat is favored by the youngest generation both because Facebook is their parents' terrain and because it's mostly about ephemeral communication amongst a close circle of friends and family that isn't judged with emojis and hearts. It's simplistic, and the creative filters keep things fun. The Snapchat Story feature does give posts a wider audience, but snaps are mostly devoid of the drama that permeates "older" social-media sites, like Facebook and Twitter.

It's hard to fault Gen Z for choosing an app that better controls who does and doesn't see their content. It's a sea change from Millennials, who favor plastering their "best" lives on sites like Instagram and Facebook for all to see.

After failing on a bid to buy Snapchat four years ago, Facebook has done the next best thing by integrating many of Snapchat's most choice features into Instagram (e.g., slideshow-sharing format, disappearing direct message, face filters, and live-video streaming). **Capturing the attention of young users unphased by TV, Instagram and Snapchat are beloved by brands seeking a vehicle to share messaging in a highly creative, video-driven way.** And look for Facebook's foray into the world of video. Soon they will begin directly competing with Netflix as their first batch of original video content is set to arrive on the platform by the end of the summer.



BUT DO THEY WALK THE WALK?

Do the recognized pitfalls of social media cause people to use it any less? No, not really. And most social-media users are quite aware of that. As had been previously mentioned, the “darker side” to social media is not hidden and, well, doesn’t really change many people’s behavior. While we see Gen Z’s Facebook usage decreasing, they are spending more time on all other platforms. Americans know that most of social media is curated and unauthentic. They know that it’s easier to treat people poorly online. We’re painfully aware that fake news can quickly spread and damage public discourse, yet, 60% of Millennials get their news from social media. Americans, young and old, know that more time should be spent away from the keyboard but struggle to unplug. While more than 60% of us are concerned that we rely too much on technology, nearly just as many believe that technology is making the world a better place and bringing people closer together.

60% of Millennials get their news from social media.

It’s still hard to fathom that TV is now a second or even third option among young Americans looking for their video fix, but YouTube—and its bottomless pit of content—has made it so. Let’s do some quick math: Just 57% of Generation Z says it watches TV very often/often (by comparison, 78% of Baby Boomers and Generation X do with the same frequency).

SPENDING MORE TIME ON THAN LAST YEAR

	GEN Z	MILL	GEN X	BOOM
Twitter	32	↑ 33	27	↓ 20
Facebook	26	33	↑ 39	↓ 26
Instagram	↑ 44	40	↓ 36	↓ 18
Snapchat	↑ 58	42	↓ 29	↓ 21
YouTube	↑ 62	↑ 50	↓ 35	↓ 24

Bold ↑↓ denotes positive/negative significance



YOUTUBE (DOMI)NATION

While all of the five main social media sites are seeing upward ticks in traffic, the biggest growth comes with YouTube — especially a whopping 62% of Gen Zers who say they're visiting more this year than last. Sixty-three percent of these same teens subscribe to YouTube channels (not even half of any other generation does). **And it's not just Gen Zers amping up YouTube's numbers, its usage and popularity continue to grow across all generations.**



CONSIDER THIS

From being the internet's biggest library of cat videos, the site has become a massive source of entertainment, educational information, how-to's, product reviews, and "unboxing" videos, and increasingly, a showcase for brands to connect with consumers through the power of video.

It's a key component for consumers looking for authentic and peer-led information about products and reasons to connect to (and obsess over) their favorite brands. Be sure that your marketing plans include a well-rounded strategy to mesh dedicated brand channels, sidebar ads, influential YouTuber sponsorships, and pre-roll advertising.

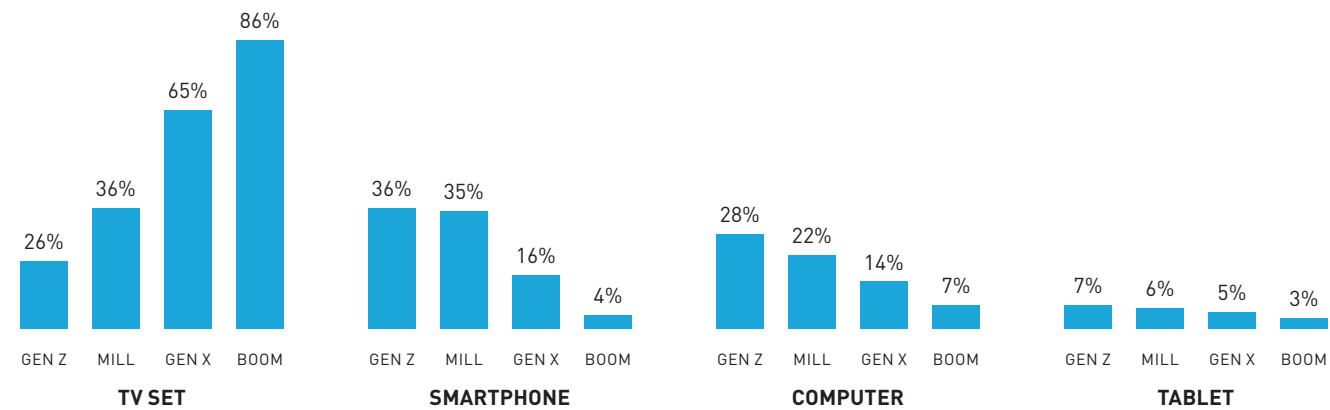
And of course there's the extra mileage you'll get when friends share great content (which might be yours!) with each other. To make sharing even easier, the relatively new YouTube Messenger lets viewers send videos directly to friends within its chat-enabled sidebar — without even leaving the walls of YouTube. All we can say is: watch out Facebook.

TINY SCREEN TAKEOVER

Of course, sites like YouTube and other streaming services are typically accessed on mobile devices — allowing younger generations constant access to video programming. In fact, Gen Z (71%) and Millennials (63%) say that they most often watch video programming on a combination of smartphones, computers and tablets — considerably more than Boomers do (14%).

And, increasingly, the line is blurring around the definition of "programming," with the growing availability of live, recorded, and on-demand fare readily available. Especially among younger viewers, content is content — and there's little mind whether it comes from a broadcast or cable network, a subscription-based platform (Netflix, Hulu, Amazon), an established YouTuber, or random memes shared among friends.

DEVICE THAT YOU MOST OFTEN WATCH PROGRAMS (TV SHOWS, MOVIES AND VIDEOS)



Many have dubbed the past few years as a new Golden Age of television—with top-notch talent, smart writing, and film-quality production value on and off so-called traditional outlets. Netflix got the second-most Emmy nominations in 2017, just behind HBO, and Hulu went from two last year to 18 this year. And it’s not just Academy Award winners like Nicole Kidman and Kevin Spacey lighting up the small screen. For example, Lucas Cruikshank earned his own Nickelodeon show simply by recreating the character he portrayed on YouTube for years. And Issa Rae’s YouTube hit *The Misadventures of Awkward Black Girl* was picked up by HBO last summer, and has received critical acclaim.

All of this contributes to the incredible amount of on-demand, streaming and binge-viewing occurring nationwide, especially among young people.

Especially among younger viewers, content is content—and there’s little mind whether it comes from a broadcast or cable network, a subscription-based platform (Netflix, Hulu, Amazon), an established YouTuber, or random memes shared among friends.

WHICH OF THE FOLLOWING ARE TRUE FOR YOU? (%)

	GEN Z	MILLENNIALS	GEN X	BOOMERS
I pay for a streaming service like Netflix	57	62	51	36
I watch movies online	56	54	39	20
I watch TV shows online	54	55	37	21
I subscribe to YouTube channels	63	46	22	12
I record TV programs using a DVR	24	34	36	40



CONSIDER THIS

There's no time for marketers to lament fragmentation and time-shifting or fixate on the only 41% of Americans who say they don't pay attention to advertising. First off, few consumers will admit advertising works, because they like to believe they're making purchase decisions without corporate influence. So, all things considered, take it as a positive that two in five — and closer to half among Gen Z — do pay attention to advertising. And if Gen Z, who consider TV an afterthought, are more open to advertising, then clearly there's an appetite for it. Native advertising has great potential among younger audiences, who have less experience with the traditional variety, and can be moved to consume it if it's entertaining enough to compete with the YouTube videos they devour like potato chips.

So, while Americans' trust of advertising is pretty low, maybe it's time for marketers to focus more on courting them to earn affinity. Think about your greatest dates — it was something your date said or did that made you laugh, smile or

become intrigued, and softened your resolve. Whether it's a romantic relationship or a brand relationship, trust can be earned, but once you have it, you have to go out of your way to keep it.

The lesson learned is to make advertising more appealing, interactive, and experiential. Pepsi, for example, had great success with its partnership with the FOX drama *Empire*, allowing fans to consume extended storylines, music, and additional visual content via the brand's mobile app; the deal will resume for the show's third season. Oreo, too, scored big with its "Twist, Lick, Dunk" mobile app, which was downloaded seven million times and had users spending an average of 40 minutes dunking Oreo cookies in a mobile environment.

Besides all things digital, don't rule out more traditional, paid platforms like magazines, billboards, radio, online sidebars, on-shelf displays, packaging, and television. If the placement is right and the messaging entertains, informs, and grabs attention, there are still plenty of eyeballs that will engage.

SOUND OPINIONS

If there's one thing we can all agree on, it's the importance and ubiquity of music in our lives.

Nearly seven in 10 Gen Xers and younger listen to music often or very often. How it's consumed, however, continues to evolve. YouTube is not only in the mix, but it leads all other sources as the preferred way to listen to music by all generations (except for Boomers, who still favor AM/FM radio and on-life-support technology, CDs). That three

streaming services — all of which can be enjoyed gratis — are tops among Gen Z should be some cause for concern, and opportunity, among music brass. Clearly, this feeds into young people's need for instant gratification. If they're able to endure paid programming in between listens, then it's all good.

Amazingly, MP3 files — not long ago seen as the future of music — are only a top-5 music choice among Gen Z, but no other generation.

WHICH OF THE FOLLOWING DO YOU USE FOR LISTENING TO MUSIC? (%)

GEN Z			MILLENNIALS			GEN X			BOOMERS		
1.	YouTube	85	1.	YouTube	78	1.	YouTube	56	1.	AM/FM Radio	59
2.	Spotify	50	2.	Pandora	44	2.	AM/FM Radio	56	2.	CDs	43
3.	Pandora	39	3.	AM/FM Radio	44	3.	Pandora	41	3.	YouTube	39
4.	AM/FM Radio	31	4.	Spotify	41	4.	CDs	32	4.	Pandora	24
5.	MP3 Files	28	5.	Google Play	27	5.	Spotify	22	5.	Satellite Radio	20

WHAT'S YOUR FAVORITE KIND OF MUSIC TO LISTEN TO? (%)

GEN Z			MILLENNIALS			GEN X			BOOMERS		
1.	Rap/Hip-hop	48	1.	Rap/Hip-hop	38	1.	80's Music	35	1.	Classic Rock	44
2.	Electronic/Dance	21	2.	90's Music	32	2.	Classic Rock	29	2.	70's Music	34
3.	Top-40/Pop	20	3.	Electronic/Dance	23	3.	Country	15	3.	Country	29
4.	Country	16	4.	Country	23	4.	90's Music	25	4.	80's Music	23
5.	90s Music/Modern Rock	15	5.	Top-40/Pop	22	5.	Top-40/70's Music	17	5.	Christian/Spiritual	16

Music preferences across the Gen Z-to-Boomer spectrum also reveal natural differences, with the most popular musical genre echoing through their teenaged years having the strongest allure. Gen Z and Millennials gravitate to rap/hip-hop, while Gen X and Boomers agree on classic rock. **Interestingly, the universal genre making the top-five favorite list across all generations is country.**

While polarizing to some, country music fans love that every song tells a story—from across a range of human emotions—whether being down-and-out, heartbroken, or head over heels. And it's the one genre that can connect folks from all corners of the U.S.A. As Porter Wagoner sang, “All the neighbors gathered round. They loved that country sound. And it was surely music to our ears.”

COMMON THREADS

GENERATION Z • MILLENNIALS • GENERATION X • BABY BOOMERS

Smartphones are nearly ubiquitous

YouTube viewership is widespread and increasing

Social media takes up more time than they'd like

Music is important, with Country holding broadest appeal

Education & the Workplace

YOU LIVE AND LEARN

The generations concur about the role of a college degree. But, achieving success with a degree is clearly not a foregone conclusion; in fact, more than two in five Americans feel otherwise. That there's that much doubt about the impact of something once considered compulsory should give everyone pause.

IT'S REALLY DIFFICULT TO GET AHEAD IN LIFE WITHOUT A COLLEGE DEGREE. (%)

	GEN Z	MILLENNIALS	GEN X	BOOMERS
Agree	59	56	56	59

As of 2016, the unemployment rate among young college graduates was 5.6%, significantly lower than young high-school graduates (17.9%), but at what cost? The yearly price tag for a private university, including all expenses, is around \$50,000. Plus, it takes (at least) four years to attain a college diploma and it guarantees nothing. In other words, would the recent high-school graduate be better (or close to better) off in the workforce instead of on campus for four years and not be faced with potentially six-figure debt?

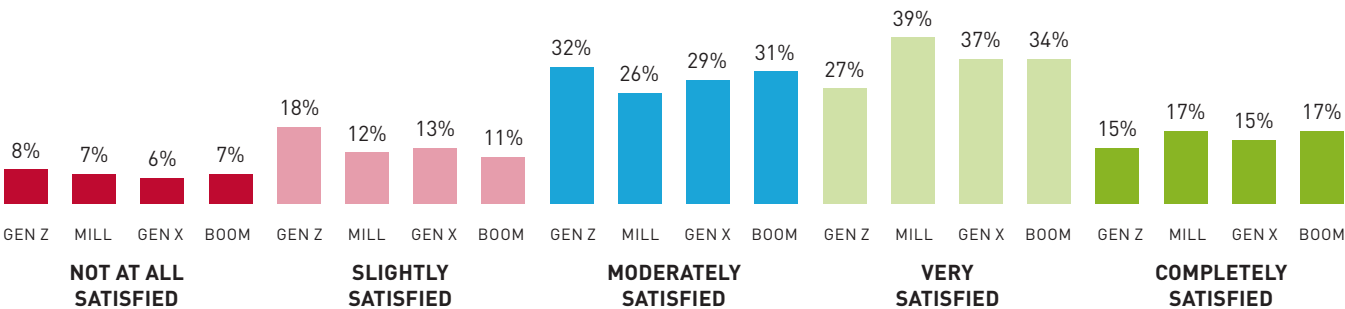
After peaking in 2010, at more than 21 million students, college enrollment has dropped off every year since. Some believe the decline is simply a result of improvements in the economy as more potential students opt to stay in the workforce instead of pursuing advanced degrees, while others say college contrarians are simply gaining followers. A recent Pew poll highlights a growing partisan divide. While 72% of Democrats believe that colleges and universities have a positive impact on the direction of the country, only 36% of Republicans hold the same opinion.

ALL WORK AND NO PLAY?

Job satisfaction is determined by a number of factors, including, but not limited to, work environment and culture, compensation and benefits, and interesting job content. Overall, those employed are fairly happy with their jobs, with almost half either "completely" or "very" satisfied with their current jobs.

The plurality of Americans prefer to work at a large, well-known company (45%), while nearly as many

HOW SATISFIED ARE YOU WITH YOUR JOB?



would rather DIY it and start their own business (41%). In qualitative research, we’ve learned that while **the idea of starting your business is appealing, the reality is that the start-up capital required to succeed makes it nearly unrealistic and, therefore, largely unrealized.** The ideal employer would provide the security and stability of a big company with the culture and flexibility of a small business. It comes as no surprise that Millennials, based on where they are in their careers, are the most open of any generation to exploring different options, including small enterprises, government, academia, and non-profits.

Playing against type, Millennials are actually an employer’s dream.

Playing against type, Millennials are actually an employer’s dream. They don’t differentiate work and personal lives, and are available to work whenever it’s required. In fact, a recent study commissioned by GFK revealed that half of Millennials (48%) say it’s a good thing to be considered a “work martyr,” while just two in five Gen Xers and one in three Boomers feel the same. Therefore it comes as no surprise that Millennials are the

most likely generation to say they catch up on work outside of their “regular” working hours.

So if work invades their personal lives, then Millennials expect personal time to be part of their working day. Asked how often they check their personal social media accounts when they’re at work, more than half of Millennials report often or very often—a significantly higher percentage than other generations, especially Boomers.

Millennials feel their work ethic will earn dividends—as do fellow generations. We had expected Boomers to index higher than other age groups on this measure, but we see parity in this regard. In our days at TRU studying teens and twenty somethings, we often referred to Millennials as “The And Generation” based on their belief that they could, and should, have it all. This is the same cohort that believes in the work hard/play hard mantra.

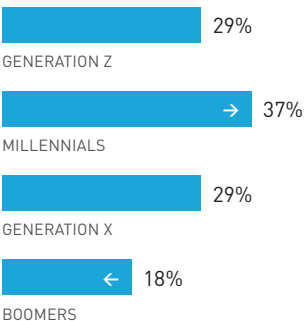
ATTITUDES ON HARD WORK (%)

TOP-TWO BOX

	GEN Z	MILLENNIALS	GEN X	BOOMERS
If I work hard enough, I can achieve just about anything	79	82	77	74
I believe in working hard and playing hard	77	80	76	69

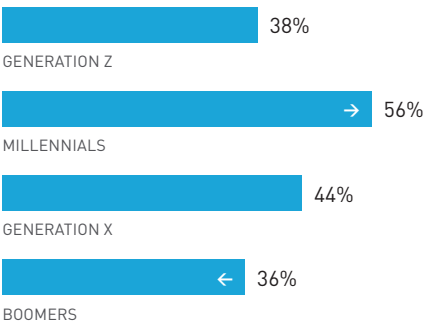
CATCH UP ON WORK OUTSIDE OF REGULAR HOURS

TOP-TWO BOX



CHECK SOCIAL MEDIA AT WORK

TOP-TWO BOX



Bold → denotes positive/negative significance

BUT DO THEY WALK THE WALK?

Most Millennials (57%) consider themselves hard workers. And 45% say that work is one of their biggest worries (compared to 31% of Xers and 15% of Boomers.) So yes, Millennials truly care about their work. And they care beyond it being a means to a paycheck. They want their employers to care about them, and give back to the larger community, so they choose to work at businesses that fulfill these needs. So it's not a surprise that nearly half (45%) believe that their employers care about them since those are the type of employees that they seek out.

The same can be said of Baby Boomers, more of whom are flouting the traditional retirement age of 65 and remaining in the workforce. According to the US Department of Labor Statistics, even after they reach the age of 70, a significant number of senior citizens are refusing to, or are unable to, retire. In early 2017, nearly one in five 70-to 74-year-olds had jobs, an increase of 42% versus 2000. Older citizens are healthier and living longer, so they're able to work longer. Many, too, must put off retirement if they ever hope to make it a reality. A 2016 Insured Retirement Institution study revealed that 55% of Baby Boomers have money saved for retirement, down from 75% in prior years. Further, those who put off retirement from age 65 to 70 can increase their retirement nut by as much as 34%, according to an SCL report.

Despite Boomers' desire to work longer and remain relevant, many employers won't indulge their dedication. Age discrimination, made illegal 50 years ago, is a serious issue in the workplace. And while younger generations don't necessarily see it as one, nearly three-fourths of Boomers, faced with it most often, certainly do.

On a similar note, Boomers are also the least likely to believe that today's employers care about the well-being of their employees.

As younger workers—specifically Millennials and Gen Z—have grown up in households where parents lauded even the simplest of accomplishments, constructive feedback and frequent commendations are recommended to effectively reach today's young workforce. We agree with the advice from a 2015 Forbes article by Jeff Fromm titled: "They Don't Need Trophies But They Want Reinforcement."

These younger generations demand instant satisfaction in nearly all other aspects of their lives. So, when they enter the workforce, and experience a dramatic satisfaction slowdown—from antiquated performance evaluations to slow-moving growth opportunities—they may lose focus and disconnect.

AGE DISCRIMINATION IS CURRENTLY A PROBLEM IN THE U.S.

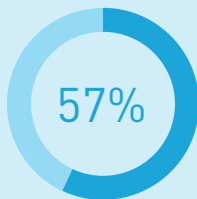
TOP-TWO BOX



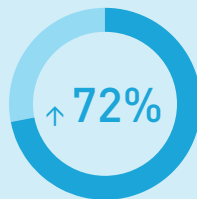
GENERATION Z



MILLENNIALS



GENERATION X



BOOMERS

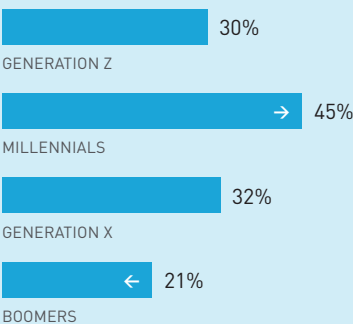
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Fromm's article highlighted one of the big generational differences in terms of employment.

"Can you guess the average tenure of Millennial employees? Two years... In comparison, the average tenure for Gen X employees is five years and seven years for Baby Boomers. One of the primary reasons Millennials are more likely to change jobs is because they are not willing to stick around if they do not believe they are receiving any personal benefit or growth."

EMPLOYERS TODAY CARE ABOUT THE WELL-BEING OF THEIR EMPLOYEES

TOP-TWO BOX



Bold → denotes positive/negative significance



CONSIDER THIS

So, what can employers do to attract strong talent across this multi-generational workforce? For starters, they should create and share a compelling mission that reflects what they're doing to make the world a better place, as opposed to just lining their pockets. This is particularly important to Millennials, who more than other generations, value working for a company that gives back to the community. As previously mentioned, Millennials make little distinction between their work and personal lives, so they expect their employer to share the same socially-conscious values important to them.

And remember to keep technology front and center. While young employees are checking social media at work, companies can leverage this behavior by promoting virtual collaboration among colleagues as well as gamified training and development.

COMMON THREADS

GENERATION Z • MILLENNIALS • GENERATION X • BABY BOOMERS

A college degree may not be the ticket to getting ahead in life

Hard work is critical to achieving what you want in life

It's important to work hard and play hard

Health & Wellness

WHAT, ME WORRY?

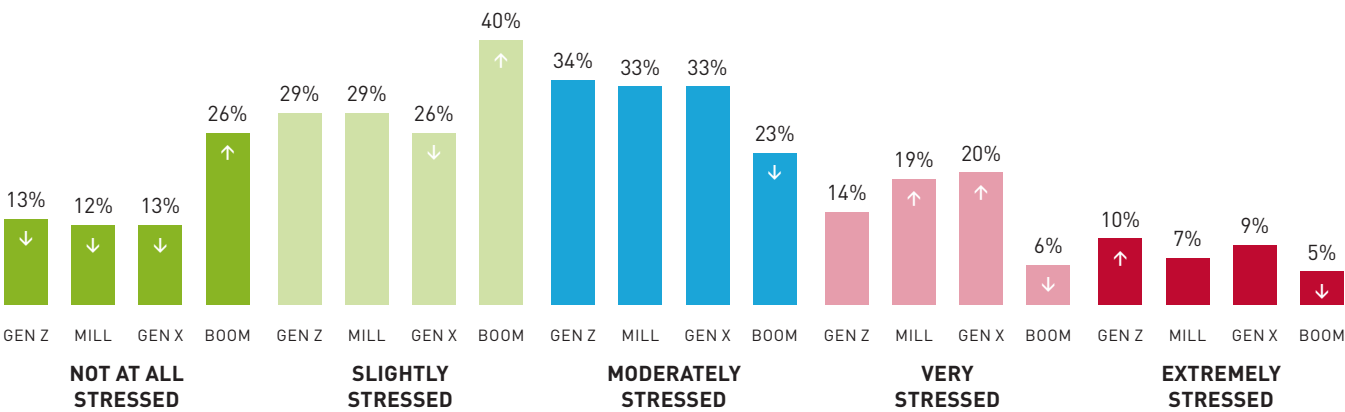
There's a bit of envy attached to this measure, and it's for the 15% of Americans who report no stress in their lives. If you're one in seven, we salute you! Mostly it's Baby Boomers buoying the stress-free percentage, as many of the headache-inducing agents plaguing younger generations — career building, raising families, preparing for retirement — are either over or now more properly managed.

The three younger generations, who have not yet reached this older plateau in life, share a nearly equal amount of stress. And while many adults may wax nostalgic about their carefree salad days, younger generations — including Generation Z — face a great deal of stress. Taking into account the top-three boxes, 62% of Gen X is *at least* moderately stressed; by comparison, just 34% of Baby Boomers are. Gen X is at the point in their lives where they're getting it from all angles; they endure the stress of fending for their families, their futures, and even withstanding their children's stress.

Even when you're underage, stress is stress, and without the benefit of experience and wisdom, it's that much harder to handle.

And, yes, Generation Z reports enduring more "extreme" stress than other generations and, overall, 58% are moderately stressed. Older generations may roll their eyes about what Gen Z has to stress about, but when you're underage, stress is stress, and without the benefit of experience and wisdom, it's that much harder to handle. Much of their stress can be chalked up to typical life-stage pressures of school and growing up that every teenaged generation has and will experience. Following suit, not only is Gen Z the most likely generation to say that the future is one of their top concerns, they also worry more about friendship and relationship issues, their appearance, their safety and emotional or physical abuse more than other generations.

HOW STRESSED ARE YOU?



Bold ↑↓ denotes positive/negative significance



Further, what generation hasn't had their formative years embroiled in some sort of national or global socio-political turmoil? However, we would argue that what today's young adults witness and how they're impacted by the uncertain, chaotic world around them takes things up a notch, particularly as their window to the world is in the palm of their hands.

DO YOU CONSIDER YOURSELF STRESSED OUT?

TOP-TWO BOX

	GEN Z	MILLENNIALS	GEN X	BOOMERS
Stressed out	46%	33%	29%	14%

So, how do these generations deal with the stress in their lives and improve their mental dispositions?

For Boomers, they don't want to just live longer — and, by all accounts, they will, as compared to earlier generations — they want to live longer *well*. They believe in the importance of physical health, are concerned about staying and eating healthy, and embrace the holistic nature of wellness.

For Boomers, they don't want to just live longer — and, by all accounts, they will, as compared to earlier generations — they want to live longer *well*.

BUT DO THEY WALK THE WALK?

Yes, in line with Boomers' beliefs, they also seem to be putting these beliefs into action, in terms of paying attention to their nutrition, seeing the doctor, taking their vitamins, and getting good sleep. Running marathons and seeing golden-years celebrities consistently demonstrating that 60 is the new 40, Boomers just expect to stay young and live life to its fullest.

However, there is still a significant chasm with respect to Boomers walking the walk when it comes to mental health. Although a whopping 94% of Boomers believe that mental and emotional health are equally as important as physical health, only 15% admit to taking medication for one's emotional health and only 9% have seen a mental-health professional in the last 12 months, lower than other generations. This disconnect between valuing mental health and valuing *treating* it is at least partly due to a perceived weakness associated with mental disorders. Boomers were reared to internalize issues or, simply, tough it out. The result, unfortunately, is one-fifth of adults 65 and over meet the criteria for a mental disorder (inclusive of dementia), according to Karel, Gatz & Smyer.

For other generations, living well and relieving stress is often a combination of physical, emotional, and spiritual improvements. Gyms have always been a popular destination for relieving stress, but now a bit passé by contemporary standards. Today there's no shortage of more vogue options that offer everything from boot camps to indoor cycling. High-end boutique fitness studios like SoulCycle FlyBarre, YogaWorks, Orangetheory and CrossFit now comprise 35% of the \$25.8 billion fitness market, according to the International Health, Racquet, and Sportsclub Association. Other ancient and new-age remedies — from crystals to cryogenics and from tapping to cupping—are increasingly entering people's spiritual consciousness and holistic daily routines, promising transcendence and spiritual awakening.

Of course, not every American has the bankroll to enroll in classes or sample cutting-edge solutions to optimize their physical and emotional well-being. Typically, it's more financially well-off Americans who frequent these types of establishments and, not surprisingly, it's those who earn a greater income that experience less stress.

ATTITUDES & BEHAVIORS (%)

ATTITUDES | TOP-TWO BOX

	GEN Z	MILLENNIALS	GEN X	BOOMERS
I believe mental and emotional health are just as important as physical health.	↓ 84	87	87	↑ 94
It's important to me to stay physically fit.	↓ 69	74	↓ 67	↑ 79
It's important for me to eat healthy.	↓ 65	75	73	↑ 81
Overall I consider myself to be a healthy person.	↓ 50	↑ 63	54	↑ 61

BEHAVIORS | CHOOSE ALL THAT APPLY

	GEN Z	MILLENNIALS	GEN X	BOOMERS
I pay attention to what I eat and drink.	62	66	63	74
I pay attention to nutrition labels.	34	49	50	57
I have had a routine check-up with my doctor in the last 12 months.	52	55	57	73
I typically get enough sleep.	60	58	52	68
I take vitamins regularly.	33	46	47	64

Bold ↑↓ denotes positive/negative significance



A recent report by The Hamilton Project revealed that higher-income Americans are twice as likely to say they're in good health than their lower-income counterparts. Not surprisingly, obesity levels are considerably higher among lower-income Americans, too.

FOOD FOR THOUGHT

In terms of sustenance, consumers across all generations say they pay attention to their eating and drinking habits, and about half of those older than Gen Z pay attention to nutrition labels. But while most people want to be healthy, and know how to become and remain healthy, often their aspiration falls short. Only 55% of Millennials have had a regular checkup with their doctor in the last 12 months. And while 2/3rds of this generation pay attention to what they eat and drink, fewer than half of them actually read nutrition labels. While 79% of Boomers want to stay physically fit, only 18% go to a gym.

However, Generation X seems to be more consistent with their attitudes and behavior toward health and wellness since they have lower goals for their health. Only 67% of Xers care to stay physically fit, the lowest mark among the four generations, and only 54% believe they are currently healthy.

Millennials are most interested in the newest ways in which to hack their health. They're as wary of gluten as they are smitten with organic food, and have attempted to diet, either on their own or with the assistance of a specific program, at a higher rate than the other cohorts.



CONSIDER THIS

Marketers have tried to seize on Americans' propensity toward eating better, so much so that chains like Veggie Grill, Protein Bar, and Roti Mediterranean Grill, are no longer viewed as passing fads. Even McDonald's has overhauled its menu to include fresh beef patties, remove artificial preservatives, and replace margarine with butter mostly to conform with Millennials' preference for healthier options.

And meals-in-a-box companies (like Blue Apron, Plated, and whatever Amazon has up its sleeve) have allowed busy consumers, including 14% of Millennials, to whip up "made from scratch" entrées delivered right to their doorsteps. In a clever move, Quaker recently started packing a free box of quick-oats, a mason jar, and a recipe for overnight oat parfaits into meal kits to surprise and delight.

Keeping up with the latest in healthy foods — think of how far kale, quinoa, and kombucha have come — pays dividends for smart food and beverage marketers who keep well ahead of the curve.

UP IN SMOKE

Beyond natural highs, some folks obviously turn to “other” means of chilling out, particularly things they can smoke or drink. Importantly, the longstanding efforts to deglamorize tobacco among teenagers have paid off. According to Truth, 23% of teenagers smoked in 2000, and in 2017 that number has dropped to 5%, according to our data. The state of New Jersey just became the third state to increase the legal smoking age to 21, following the lead of California and Hawaii. However, it’s of concern that 19% of Gen Z (and nearly 40% of Millennials) have tried an e-cigarette or vape product, which entice non-tobacco smokers with the promise of fun flavors and fewer by-products. These products are being consumed by white teenagers at a higher rate than non-white Gen Z.

Unlike tobacco, alcohol remains an often-present companion for Americans of age. The fact that roughly half of all generations over Gen Z report drinking occasionally or often is both hugely profitable for alcohol brands, yet an increasing health concern for many (unless they’re on the one glass of red wine a day regime).

Beyond natural highs, some folks obviously turn to “other” means of chilling out, particularly things they can smoke or drink.

With eight states (and counting) legalizing recreational marijuana, **it’s likely only a matter of time before cannabis becomes even more normalized, accessible, and consumed.** According to the National Institute on Drug Abuse, nearly 70% of 12th graders do not view marijuana use as harmful and a recent Gallup poll found that three in five Americans believe cannabis should be legal nationwide — up from 12% in 1969 (the year that gave us the Summer of Love). A 2013 Gallup study found that 43% of adults have tried cannabis compared to 4% in 1969. Qualitatively, we increasingly hear people

say that cannabis is safer, more natural, and less addictive than tobacco, alcohol, and harder drugs, including certain prescribed pain medications.

Even though some teens wouldn’t ever consider drinking or smoking cigarettes, it’s a different story when it comes to cannabis. While the numbers are small, our data shows that more teens have consumed cannabis in the last three months than those who occasionally drink or smoke cigarettes. And teens and young adults find that munching on THC-laced edibles (gummy bears, lollipops, and, of course, brownies) is arguably the easiest and most surreptitious way to get high, even in front of, say, their parents who are, let’s face it, probably munching on them, too.



CONSIDER THIS

Not everyone is on board with drinking. **The “sober movement” is gaining recognition with many people pushing back on the notion that alcohol consumption is simply a given;** in fact, it was reported that Americans consumed less booze last year than the year prior, the first annual decline since 2011 and only the third time it’s dropped over the past decade.

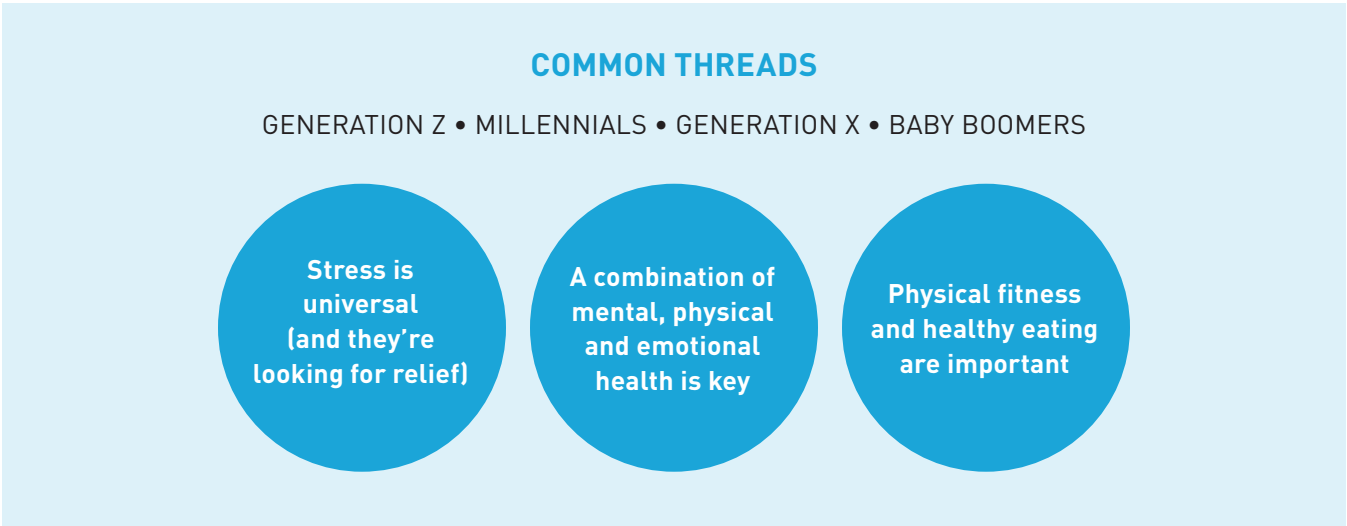
Alcohol-free bars, juice crawls, and other social events like Daybreaker, a “dry” early morning dance party circuit, have garnered lots of traction. In addition to in-person social events and venues, there are many online communities like OYNB (One Year No Beer) and The Sober School that deliver education and support in a hip way for those interested in taking a break from alcohol. Furthermore, Responsibility.org reports that drinking among teens has declined over time. All of these are ample outlets for healthy food and beverage brands to align with from sponsorship and advertising perspectives.

BEHAVIORS (%)

TOP-TWO BOX

	GEN Z	MILLENNIALS	GENX	BOOMERS
I currently smoke cigarettes often or occasionally.	↓ 5	21	26	21
I've used an e-cigarette or vaporizer instead of traditional tobacco products.	↓ 19	↑ 38	28	↓ 17
I drink occasionally.	↓ 6	35	↑ 45	↑ 45
I drink often.	↓ 2	↑ 13	8	7
I smoked/consumed a form of marijuana (last three months).	10	13	8	6

Bold ↑↓ denotes positive/negative significance



Politics & Social Issues

BIPARTISAN EXASPERATION

Regardless of which side of the aisle you sit on, elections undisputedly have consequences. And the turbulence Americans have endured over the last two years has not only placed politics front and center in most households, but it's also demonstrated deep divisions among the population. Hit any Trump-related news thread on Facebook, and watch the venom, from both sides, flow.

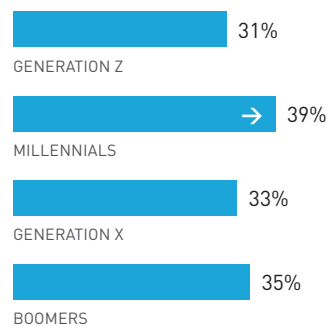
Political gridlock, at the most extreme level, has become the norm. Senator John McCain, in an impassioned speech on the Senate floor, exclaimed that in the Senate, "We're getting nothing done, my friends. We're getting nothing done." We've noticed.

As a result, 65% of Americans say they do not have "faith in the government's ability to work together to solve our problems." More than six in 10 Americans, across all four generations, believe the country is going in the wrong direction, just less than a quarter of Americans are optimistic about the future of the country, while more than twice that percentage say they're worried or scared.

More than six in 10 Americans, across all four generations, believe the country is going in the wrong direction.

I HAVE CONFIDENCE IN OUR COUNTRY, OUR GOVERNMENT, AND OUR ABILITY TO WORK TOGETHER TO SOLVE OUR PROBLEMS.

TOP-TWO BOX



Bold ↔ denotes positive/negative significance

CONTRARY TO POPULAR OPINION

Although Americans remain divided, there are several areas that keep the generations politically united. **A few pillars of the country's democratic institutions enjoy widespread support, regardless of party affiliation.** One is perhaps the greatest source of controversy — the efficacy of the free press. Never in the history of the First Amendment has there been so much (angry) dialogue about the virtue of the "mainstream media," what constitutes media bias, and what constitutes real (and fake) news itself. So, it's somewhat reassuring that nearly 70% believe that a free press is essential for a democracy.

Americans on both sides of the aisle generally agree in the importance to stand up for one's beliefs, even if they are unpopular. As a nation that was born out of a popular protest led by citizens, this is a bedrock principal of democracy itself. But, each younger generation supports the idea less fervently than the

WHAT ISSUES ARE YOU IN FAVOR OF? [%]

SELECT ALL THAT APPLY

	GEN Z	MILLENNIALS	GEN X	BOOMERS
Social security	62	69	74	89
Healthcare for all	68	68	68	72
Protecting the environment	72	68	62	69
Marrying someone of a different race	77	66	61	61
Marriage equality	66	58	53	53

one before it. Roughly 70% of Gen Z agrees with their Boomer grandparents that it's important to stand up for one's beliefs, while nearly 90% of Boomers agree with this sentiment. This is clearly a position that ages well. For Gen Z, they may interpret standing up for one's beliefs as rebellion, which might not sit well with parents and teachers that don't prize that type of behavior. On the other hand, older Americans see having a belief system as an endgame and more willingly ascribe to the bromide that if you don't stand for something you'll fall for anything.

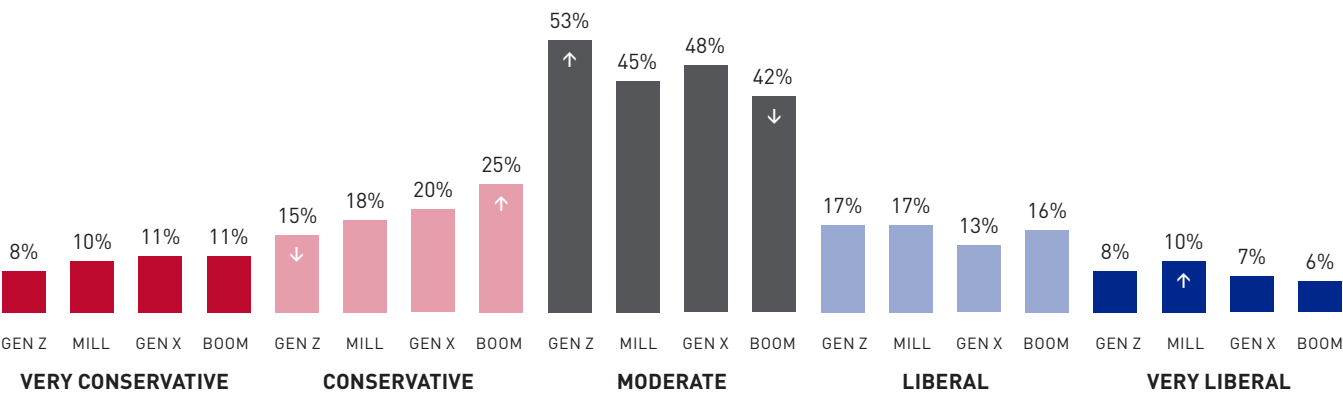
Another area that achieves bipartisan support is having a sustained system of social security and providing universal healthcare. (As expected, there is not much agreement over the scope of that care and how it should be paid for.) According to a recent Pew Research study, nearly 90% of Americans believe that having open and fair national elections is "very important" to maintaining a strong democracy. Additionally, about 80% of

Americans agree that a system of checks and balances and the right to nonviolently protest for one's beliefs are also critically important.

Around every election there's debate not only between candidates, but over the virtue of a two-party system. As the din of the debate intensifies so, too does the clamor of Americans moving toward the middle. **Nearly half of Americans consider themselves moderates, a middle-of-the-road ideology that surpasses all others.** Gen Z is the most moderate and also the least likely to be conservative, which stands to reason given their favorability towards acceptance and inclusion. Conversely, nearly as many Boomers call themselves conservative or very conservative (36%) as they do moderate (42%).

The American electorate and the elected seem to be engaged in an ideological tug of war. Americans seem to be moving toward the middle, while politicians continue to espouse extremes.

WHERE ARE YOU ON THE POLITICAL SPECTRUM? [%]



Bold ↑↓ denotes positive/negative significance

MAKE AMERICA FIRST AGAIN

One of the main themes of President Trump’s 2016 campaign focused around the concept of putting America’s interests first, ahead of those of other countries. **Like the presidential election itself, there is a drastic generational divide when considering America’s role in the world.** This division is seen not only across generations, but is also highlighted based on ethnicity. While 66% of white respondents agree that America’s interests should go first, a majority of those who are non-white disagree.

It’s little surprise that the younger generations don’t subscribe to the nationalistic views of their parents, as older generations spent most of their lives cloistered from the rest of the world. Younger generations, however, have been living their lives online and on social media for as long as they remember and, therefore, have better familiarity and affinity toward foreign territories. And when looking at this answer based on ethnicity, the pattern continues from the previous question. Nearly two-thirds of white respondents believe the U.S. is in fact the greatest country in the world, while fewer than 50% of non-white respondents agree, including only 41% of Asian Americans.

Perhaps the greatest example that the country has changed post-9/11 is with regards to patriotism, or lack thereof. In 2005, a Roper Reports unit of

NOP World poll revealed that 81% of Americans said patriotism was “in.” **Today, just a quarter of total Americans currently describe themselves as “patriotic,” with Boomers feeling the most, but still very little, pride (42%).** By comparison, less than a fifth of Millennials and Gen Z consider themselves patriotic. This leads to the question: Is America amidst a branding crisis? Did last year’s contentious election and bilious spillover into this year harm the red, white, and blue or is it that younger generations no longer have a U.S. vs. them mentality and, therefore, see patriotism as too associated with nationalism?

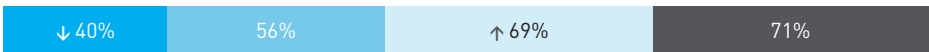
Is America amidst a branding crisis?

According to a 2016 Census Bureau analysis, 48% of the Gen Z population is non-Caucasian, which alone makes Gen Z the most diverse generation, just ahead of Millennials (44%). Following suit, **Gen Z proves to be the most open and accepting generation in both opinions and actions.** Only one in four Gen Zers support tougher immigration laws (compared to 55% of Boomers). Nearly six in 10 Gen Zers support protecting the rights of those who are transgender, 10 percentage points more than Millennials (57% vs. 47%). They also support marriage equality (66%) and marrying someone of a different race (77%) more enthusiastically than do Millennials.

ATTITUDES ON AMERICA [%]

TOP-TWO BOX

It’s important to put America first before the needs of other countries



America is the greatest country in the world



I consider myself patriotic (SELECT ALL THAT APPLY)



■ GENERATION Z ■ MILLENNIALS ■ GENERATION X ■ BOOMERS

Bold ↑↓ denotes positive/negative significance



DO THEY WALK THE WALK?

Yes, their diversity is not just lip service: More than 80% of Gen Z report they have a friend of a different race, and nearly 60% have a friend of a different sexual orientation. And they are open and accepting of it. While Millennials seek out just about any reason to celebrate themselves, for Gen Z, diversity is not necessarily something special. They were born into it, and are used to it. Unlike other generations, they don't have an open mind when it comes to restricting the rights of people based on how or where people are born or who they love. So, they appear to have less tolerance for intolerance than any other generation. And as a result, we see "safe spaces" on college campuses and professors issuing "trigger warnings" before controversial lessons in order to not harm the psyche of this diverse group.

Again, we see the optimistic outlook of Millennials — significantly more of this cohort believe that their generation will be remembered for changing the world for the better. And while the numbers aren't too high overall, Millennials also surpass other generations in their desire to proactively make the world a better place and in our nation's ability to work together to solve problems. And we could use that kind of optimism, considering all generations — Millennials included — don't believe their generation will be remembered for changing the world for the better. Of course, considering the aforementioned national divides, *better* is all in the eye of the beholder.

HOW OPTIMISTIC ARE YOU? (%)

TOP-TWO BOX

	GEN Z	MILLENNIALS	GEN Y	BOOMERS
I want to do things for others and make the world a better place.	74	↑ 79	76	↓ 71
Our generation will be remembered for changing the world for the better.	35	↑ 44	35	↓ 32
I have confidence in our country, our government, and our ability to work together to solve our problems.	31	↑ 39	33	35

Bold ↑↓ denotes positive/negative significance



COMMON THREADS

GENERATION Z • MILLENNIALS • GENERATION X • BABY BOOMERS

It's critical to
stand up for
one's beliefs

All should have the
right to protest

Protecting the
environment is
important

Openness
to interracial
marriage

Desire to
do things for
others and make
the world a
better place

Low confidence in
the government's
ability to solve
problems

A free press
is essential for
democracy

Life & Psyche

FACTS OF LIFE

Sorry to say, that we don't have the research to back this up, but we're hypothesizing most of Generation Z and, while we're in speculation mode, many Millennials haven't a clue who Frank Sinatra was. Too bad, too, because lyrics from his signature song, "My Way," apply to those and, really, every generation.

Our sincerest apologies if you now have "My Way" stuck in your head, but we can think of no better example to emphasize the importance all four generations — and, in retrospect, the ones that preceded it — place on living their lives to the fullest, having as much fun as possible, and doing so without regard for what others may think.

Boomers, in particular, are less concerned with how others perceive them, which validates the notion that the need for acceptance or to please others becomes less of a priority as we age. They've reached a phase where they are living their authentic selves, true to who they are and accepting of the challenges of this lifestage. As tipped earlier, no generation is particularly interested in what others think of them.

The idea of having fun is also a core tenet for all ages, especially among Millennials and Gen Z. However, given their schedules, they may not be having as much fun as they'd like. Therefore, the concept of fun is both aspirational and appealing.

SATISFACTION (NOT) GUARANTEED

In terms of being content, however, Gen Z, Millennials, and even Gen X aren't there quite yet. They've got more to accomplish and more time to stake their claim. However, younger generations will likely chart a course alien to older ones. Younger generations continue to challenge the rules set forth by Gen X and Boomers, especially as it relates to college, career and how, when, and if to "settle down."

In order to fit in, it's become important to be unique, so if you're too basic, beware.

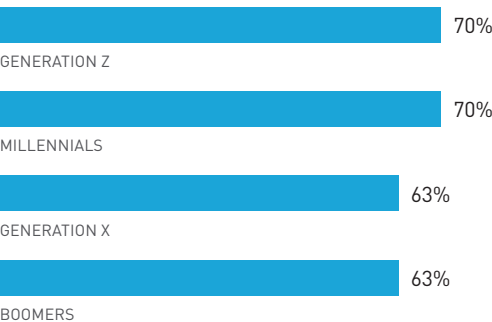
IT'S IMPORTANT FOR ME TO LIVE MY LIFE, REGARDLESS OF WHAT OTHERS MIGHT THINK

TOP-TWO BOX



I ALWAYS TRY TO HAVE AS MUCH AS I POSSIBLY CAN

TOP-TWO BOX



I'M GENERALLY CONTENT WITH MY LIFE

47%

GENERATION Z

60%

MILLENNIALS

56%

GENERATION X

71%

BABY BOOMERS

In light of these generational differences, fewer than half of Gen Zers say they're content with their lives. As a time-told truth, the teen years are a difficult lifestage, marked with the stress associated with adolescence and finding one's identity. **Gen Z's resume is measured mainly by academic achievement, often to the point of obsession by their family, peers, and themselves.** And adding fuel to the fire, their constant connection to the Internet brings them in close contact with cool people doing cool things that they're most likely not experiencing. Plus, in order to fit in, it's become important to be unique, so if you're too basic, beware. Therefore, it comes as little surprise that Gen Z is the group most likely to say they oftentimes feel like a failure. For Gen Z, there's not much relief in sight, and they have a realistic view about the future. Gen Z is the group most likely to believe that life actually gets more challenging as they get older.

For teens and young adults, new experiences are their oxygen.

As a result, Generation Z is all about finding a way to relieve stress. From going to the movies to hanging outside to making new friends, the youngest generation is considerably more active and adventurous than older generations. For teens and young adults, new experiences are their oxygen.

Not only are these experiences a break from reality, but they qualify as social currency, something to share and get credit for on the likes of Instagram or Snapchat.

BELIEVE IT OR NOT

A few years ago, while at TRU, we crafted and presented a theme called "Trust Lust," which essentially highlighted that due to a plethora of public scandals and corruption cases in the corporate, political, and religious sectors, consumers had lost their faith in authority figures and were skeptical about everything. Over time, that struggle for truth hasn't diminished. **All four generations have a difficult time placing trust in others. And, in an ironic twist, while most people don't trust others, they do consider themselves trustworthy.** Nearly 70% of Americans call themselves trustworthy, including 80% of Boomers.

In addition to public breaks in trust, younger generations have been trained and conditioned to be leery of others, in general. While older generations faced classroom drills in case of nuclear- or weather-based events, teens these days don't remember (or weren't alive) pre-Columbine or pre-9/11, and have grown up from kindergarten onward with domestic and foreign fear mongering, lockdown drills, and cyberhacks.

LOSING MY RELIGION?

Across the four generations, most (64%) say they believe in God or a higher power, with Boomers — born into a more pious environment — leading the pack at 76%.

GENERATIONS & RELIGION (%)

TOP-TWO BOX

	GEN Z	MILLENNIALS	GEN X	BOOMERS
I believe in God or a higher power	59	57	61	76
I consider myself religious	38	48	56	61
My religion or faith is one of the most important parts of my life	40	46	55	59
I pray regularly	34	43	51	57
I go to religious services regularly	25	22	22	23
I go to religious services occasionally	18	21	23	23



BUT DO THEY WALK THE WALK?

“Believing” does not necessarily mean that people consider themselves to be religious or spiritual, nor that their faith is one of the most important things in their lives. And when it comes to praying and attending religious events, even fewer make these activities part of their lives. Only 20% believe that “following your faith” is a sign of a successful life. For comparison sake, 31% believe that owning a home is a more significant indicator of a life well-lived.

The reality is that the number of U.S. adults who do not identify with any organized religion continues to grow, according to the Pew Research Center. Pew found that while those identifying as Christians have decreased, other non-Christian faiths (such as Muslim, Jewish and Hindu) have increased as a share of the population. And the largest increase, from 16% to 23%, is among those who consider themselves to be unaffiliated with any religion.

And while the trend away from organized religion seems to be occurring among white families, the trend is different in black households. Fifty seven percent of black Gen Z respondents described themselves as “spiritual” compared to only 36% and 32% of white and Hispanic Gen Z, respectively. African Americans in Gen Z also believe their life is full of purpose (66%) more than their white (52%) and Hispanic (57%) peers. And as a result, they are much more open (50%) to learning about different faiths and religions than other ethnic groups that were measured.

MIND YOUR MANNERS

Though few will argue technology has advanced society beyond our wildest dreams (and *The Jetsons*), it often seems like a dark age for social graces. There's no shortage of examples of people of prominence or viral sensations (think the "Cash me outside" girl), who demonstrate disrespectful conduct or incivility. Fewer than half of Americans, in general, believe that people have good manners and treat others with respect. As one dramatic example, there were 620 gun-involved road rage incidents last year—more than double from two years prior. When posed a question about civility, respondents are likely thinking about their peer-to-peer interactions, so it makes sense that the numbers are lowest among teens who see people their age as the most disrespectful.

When given a whole host of examples of situations that potentially cross the line between acceptable and unacceptable, Gen Z is markedly more tolerant of them all. As an example, only 37% of Gen Z considers it impolite to talk on a cell phone on public transportation, while 62% of Boomers do. It's the evolution (or devolution) of a world where social interaction makes little distinction between face time and FaceTime, knowing full well Generation Z never lived in a world where the former was the preferred way to communicate. Now that it's not—heck, most would rather text than talk on the phone—we're entering a new world, and we'll need to be brave to navigate it.

COMMON THREADS

GENERATION Z • MILLENNIALS • GENERATION X • BABY BOOMERS

The desire to
live to its fullest

Wanting to
have as much
fun as possible
regardless of what
others think

Having
limited trust
in others, but
considering
themselves
trustworthy

Their frequency
of going to
religious services

Hopes & Aspirations

THE SECRET OF THEIR SUCCESS

Across all generations, there are some accepted signposts of a successful life: mainly that of being healthy enough to enjoy it, and being partnered with someone with whom you can share it. Other factors, too, have a traditional tint, such as the act of helping others, being a good friend and parent, and having children. Interestingly, the importance of having a successful career and having a job you love declines significantly over time, suggesting that the travails of a career (even one they love) become less important as one looks back on the time spent working compared with more personally meaningful pursuits — like having children and watching them reach their potential.

Asked what defines having a successful life, Gen Z and Millennials, in particular, say traveling the world qualifies. Both generations value life-enriching experiences and see the freedom of travel, and ability to bankroll it, as emblematic of success. Conversely, older generations — who have either had

their fill of planes, trains, and automobiles or have come to terms with not having the wherewithal to use them — see travel as less essential. Perhaps they see myriad passport stamps as a fabricated status symbol, much as they see “having lots of money” as relatively unimportant (it ranks third to last among 20 attributes). Further, Boomers are more wary about being in areas vulnerable to terrorism. Roughly two-thirds of the youngest two generations consider themselves adventurous; less than half of Xers and Boomers share that sentiment.

The importance of having a successful career and having a job you love declines significantly over time

In terms of individual generational differences, we’re seeing some logical distinctions. As a current reality for many Gen Zers, they place graduating from college among the top-10 signs of a successful life.

WHICH OF THE FOLLOWING DO YOU FEEL ARE THE MOST IMPORTANT SIGNS OF A SUCCESSFUL LIFE? (%)

SELECT UP TO EIGHT

GEN Z

Having a long, healthy life	66
Having a happy marriage	64
Having a successful career	58
Helping others	45
Being a good friend	44
Traveling the world	44
Graduating from college	43
Having children	42
Being a good parent	31
Having a job you love	31

MILLENNIALS

Having a long, healthy life	64
Having a happy marriage	58
Having children	47
Having a successful career	47
Helping others	43
Traveling the world	43
Being a good friend	37
Being a good parent	35
Having lots of money	30
Being able to retire when you want	28

GEN X

Having a long, healthy life	61
Having a happy marriage	57
Helping others	47
Being a good friend	43
Having children	42
Being a good parent	36
Being debt-free	36
Spending lots of time with your family	31
Having a successful career	30
Owning a home	30

BOOMERS

Having a long, healthy life	66
Having a happy marriage	60
Being a good friend	54
Helping others	52
Having children	52
Being debt-free	44
Being a good parent	40
Being able to retire when you want	40
Having grandchildren	40
Owning a home	39

Millennials have more of a money mindset — they see success synonymous with wealth, and have likely accepted the new normal of taking on debt.

Now that Gen X is seeing their kids off to college, this generation is spending more time with their families, while Boomers are trying to retire when they want, rather than when they must.

All four generations claim that being famous is not all that it's cracked up to be.

And, notably, all four generations claim that being famous is not all that it's cracked up to be; it ranks last in this list of 20. Still, 8% of both Gen Z and Millennials — who are well aware of the scores of YouTubers, bloggers, and reality-TV stars who achieve overnight success — believe that being a celebrity has its perks.

SWEET (AMERICAN) DREAMS ARE MADE OF THIS

For decades, a common unifying characteristic among Americans was our endless wealth of optimism for one's own personal life journey. While being skeptical of their own government is nothing new, Americans have typically been hopeful that their lives, and those of their children, would improve. In fact, the American Dream itself is a symbol for an idyllic future. Although there is no single, specific definition of the "American Dream," achieving it is typically associated with having financial security, social stability, and, a loving family (we'll skip the white picket fence). However, **when asked about the American Dream, more of these generations overall believe that it's no longer a reality (37%)** compared to those who believe they're currently living it (29%). With Gen Z having most years ahead of them (21%), it's not surprising that they don't believe they're currently living the Dream.

But what's more concerning is how few Boomers (32%) consider that they've achieved the American Dream, given how long they've been presumably striving for it. The American Dream was once

the pinnacle of what it meant to be a successful American — if one worked hard, had a family, a nice suburban home, and enough money to do what he or she wanted. Our guess is that their low perception of achieving it reflects that many have fallen short near the closing of their lives. Most Boomers view the 1950s as the greatest American decade in modern history — not a big surprise since that's when they grew up and, often, youth is romanticized. Plus, the '50s was a decade of economic growth, particularly for the middle class. College was affordable and good-paying jobs were plentiful. Decades later, that stability is not a given. With a middle class that has been shrinking since the '50s, it's harder for this generation to still believe in the American Dream.

But what's more concerning is how few Boomers (32%) consider that they've achieved the American Dream, given how long they've been presumably striving for it.

ATTITUDES ON THE AMERICAN DREAM (%)

TOP-TWO BOX

	GEN Z	MILLENNIALS	GEN X	BOOMERS
The American Dream is no longer a reality.	34	↑ 41	37	34
I'm currently living the American Dream.	↓ 21	33	30	32
I'm looking forward to what's ahead of me.	64	↑ 70	65	63
My life is full of purpose.	↓ 53	↑ 67	55	58

Bold ↑↓ denotes positive/negative significance

While Millennials have the lowest expectation that the American Dream is a reality, our belief is that they're redefining the symbols of success that make up the dream. Two years ago, Penn Schoen Berland conducted a study among all generations that inquired about elements that comprise the American Dream. The results defied almost all

stereotypical definitions: Just 14%, for example, said having kids was part of it, while 36% said being debt free was part of it. Now how would Norman Rockwell paint *that*? Today's American Dream isn't about reaching the milestones that Boomers aimed for, as Millennials are likely to consider experiential elements, like traveling and having more flexibility in their lives. While money is still important to them, how they achieve it and what they do with it differs.

Still, roughly two-thirds of each of these generations say they look forward to what lies ahead — particularly the ever-optimistic Millennials who have the highest belief that their lives are full of purpose (67%) compared with the other three generations.

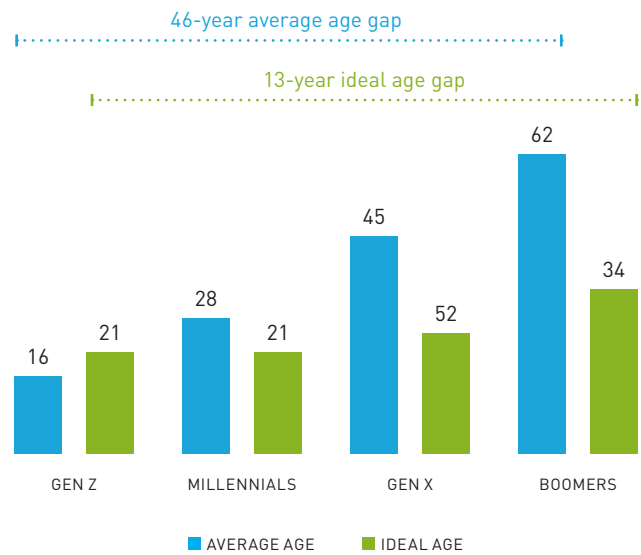
YOUNG AT HEART

We resurrected a classic TRU measure for the Generation Nation study. It was one of our most simple, yet revealing questions. We asked each of the four generations to write in the age they'd like to be if they were standing by a Zoltar machine (that's a *Big* reference for you Millennials and Gen Zers). We calculated both the average and aspired ages for each generation. Perhaps not surprisingly, Generation Z's average age is 16, but they see 21 as their blackjack. This is a timeless truth for teens: They can't wait to get to that next level, when they perceive more freedom, without all the responsibilities of being an adult. For Millennials, they also wish they could go back to that exciting time in their lives. Yet, as they age, they're finding out that adulting is tougher. So, Gen X also looks back fondly on younger years.

Roughly two-thirds of each of these generation say they look forward to what lies ahead.

But the biggest difference is among Boomers. At this reflective time in their lives, they're typically thinking back on those years when they were first settling down and having kids. And, in custom research, we often hear that they don't fully appreciate what a magical time that was, until they're older... and have grandkids.

AVERAGE AGE VS. IDEAL AGE



	GEN Z	MILLENNIALS	GEN X	BOOMERS
Birth years	1998-2016	1981-1997	1965-1980	1946-1964
Best part of life	20s	20s	20s	30s



CONSIDER THIS

What starts off as a 46-year gap in terms of their actual ages, suddenly narrows to a 13-year gap, in terms of their aspired ages.

Similarly, we asked respondents to tell us the decade that is, was, or that they expect will be the best part of their lives, from childhood up until past their 70s, and the results were essentially the same. For most, their 20s is the best time of their lives. And for Boomers, it's their 30s. The bottom line is that this is a way to connect with a very broad audience based upon a fairly narrow aspirational mindset.



BUT DO THEY WALK THE WALK?

Millennials, as the constant optimists, acknowledge their excitement for the future while also admitting to the closing of the best part of their lives. While they mostly look forward to what lies ahead, they also believe that as their 20s close, they might be past the best part of their lives. Is it possible to be both optimistic and fatalistic?

When asked what the best decade has been so far for America, Millennials and Gen X cite decades when they were teenagers, likely a time when it mattered little to their day-to-day how well the country was faring, and so they erred on the positive. Because their personal historical point of view is brief, Gen Z

probably isn't so sure which decade was America's greatest, so it's safe for them to name the decades (1990s, 2000s, and 2010s) they're most familiar with.

In fact, all generations seem to favor the decade that yields the most childhood memories, more so than the ones they were born in. It's almost unimaginable for most Americans to cite decades completed before they were born as America's greatest, as it's ultimately subjective and few want to believe they're living in a world starkly worse than it was before. It is, however, a bit telling that, other than Gen Z, the other three generations call at least three other decades better than the one they're living in now. Let's hope time is on our side.

COMMON THREADS

GENERATION Z • MILLENNIALS • GENERATION X • BABY BOOMERS

Worry about achieving the American Dream, and uncertainty that it exists

Still there's general optimistic about the future

Their aspirational target age falls between 21 and 34 (a 13-year span)

The best decade is one they grew up in

Detailed Findings

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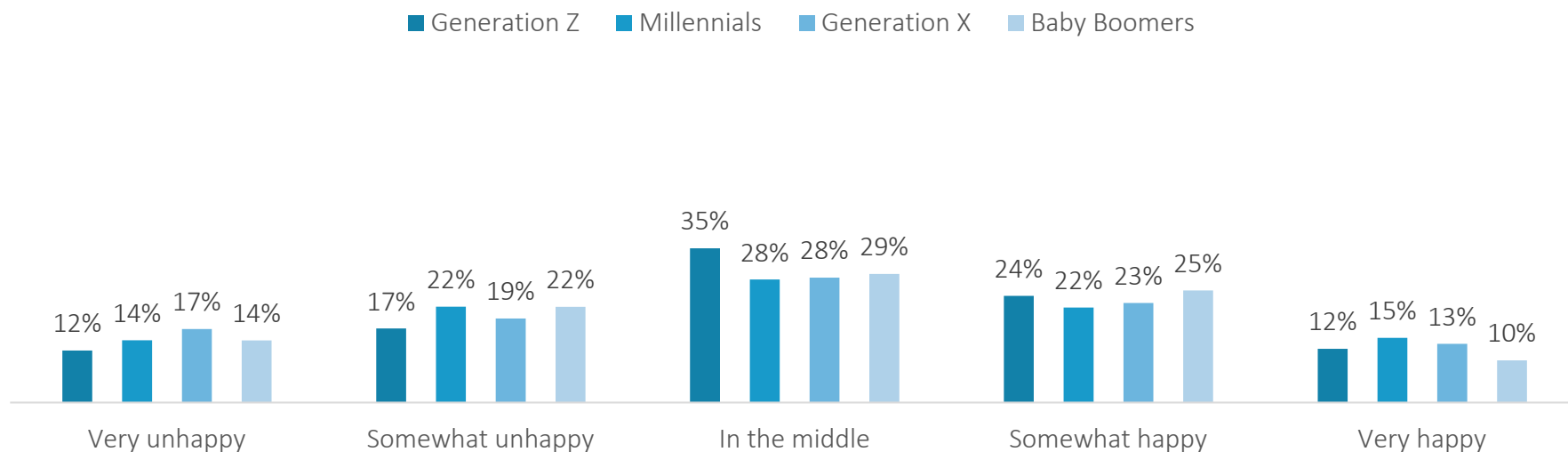


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Happiness with current financial situation



When it comes to finances, only 29% of Gen Z is *unhappy*, compared to 36% of older respondents. Most respondents are "in the middle" (30%) in terms of satisfaction with their current financial situation, followed by somewhat happy (23%) and somewhat unhappy (20%).

Sample Size: 2,117 (51% of Respondents) - How happy are you with your current financial situation now?

Happiness with current financial situation

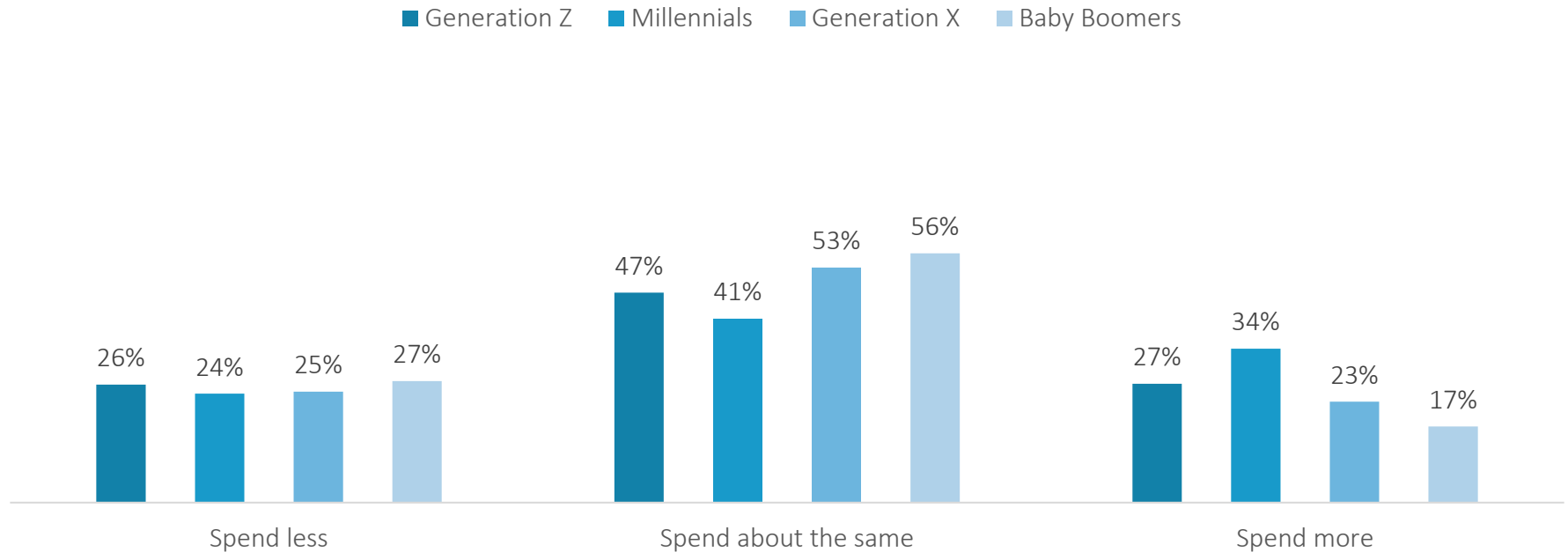


	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
[Bottom-Two Box]	35	↓ 29	36	36	36
Very unhappy	15	12	14	17	14
Somewhat unhappy	20	↓ 17	22	19	22
In the middle	29	↑ 35	28	28	29
Somewhat happy	23	24	22	23	25
Very happy	13	12	15	13	↓ 10
[Top-Two Box]	36	36	36	36	35
Base	N=2117	n=500	n=566	n=540	n=511

Sample Size: 2,117 (51% of Respondents) - How happy are you with your current financial situation now?



Spending expectations: this year vs. last



Baby Boomers, often on a fixed income, are the least likely to spend more this year (17% vs. 34% of Millennials) and are the most likely to spend about the same (56%).

Sample Size: 2,117 (51% of Respondents) - Do you expect to spend more money, less money, or about the same amount of money this year as you spent last year?

Spending expectations: this year vs. last



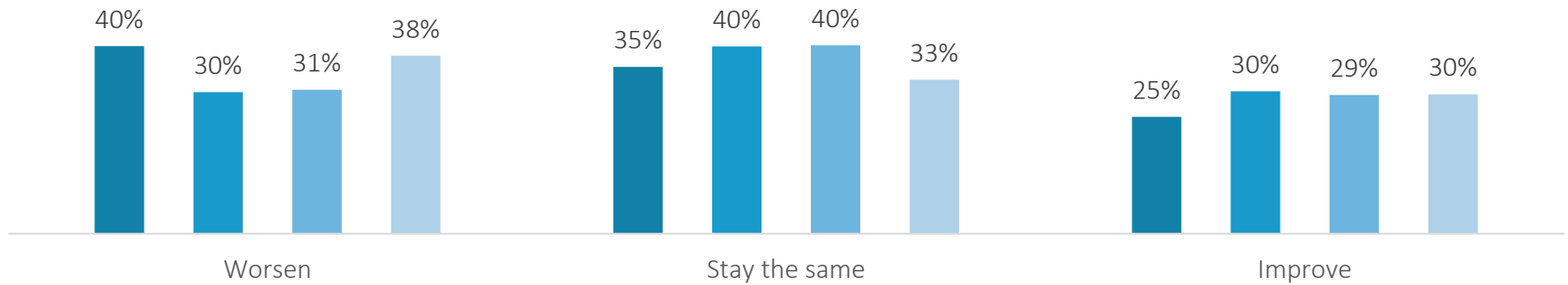
	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Spend less	26	26	24	25	27
Spend about the same	49	47	↓ 41	53	↑ 56
Spend more	25	27	↑ 34	23	↓ 17
Base	N=2117	n=500	n=566	n=540	n=511

Sample Size: 2,117 (51% of Respondents) - Do you expect to spend more money, less money, or about the same amount of money this year as you spent last year?

Expectations for U.S. economy in next 12 months



■ Generation Z ■ Millennials ■ Generation X ■ Baby Boomers



Gen Z and Boomers are the least optimistic regarding the U.S. economy: 39% expect it to worsen, vs. 30% of Millennials and Gen Xers. More Millennials (40%) and Generation X (40%) expect the economy to stay the same.

Sample Size: 2,117 (51% of Respondents) - In the next 12 months do you expect the overall economy in the U.S. will...?

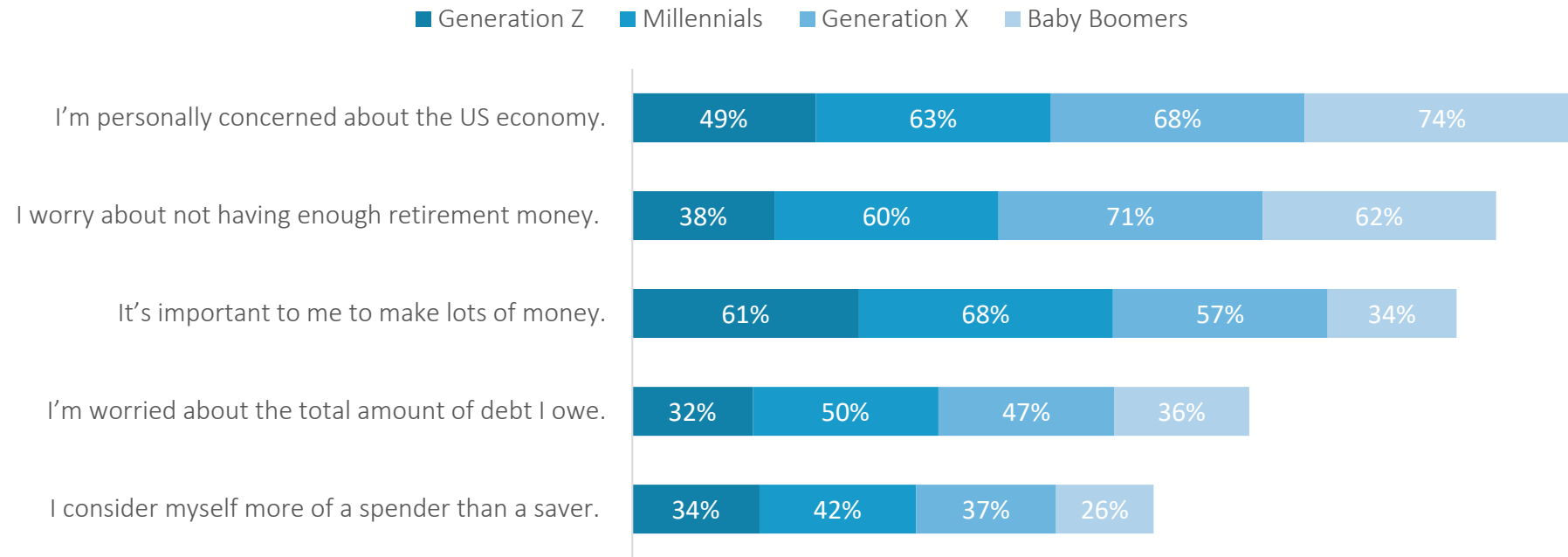
Expectations for U.S. economy in next 12 months



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Worsen	34	↑ 40	↓ 30	↓ 31	38
Stay the same	37	35	40	40	↓ 33
Improve	29	↓ 25	30	29	30
Base	N=2117	n=500	n=566	n=540	n=511

Sample Size: 2,117 (51% of Respondents) - In the next 12 months do you expect the overall economy in the U.S. will...?

Attitudes about money



A majority are personally concerned about the U.S. economy (66%) and having enough money for retirement (61%). The two youngest generations are more concerned with making lots of money; while the middle generations are concerned with personal debt, and the two oldest generations with retirement and the economy.

Sample Size: 2,117 (51% of Respondents) - How much do you agree or disagree with the following statements?

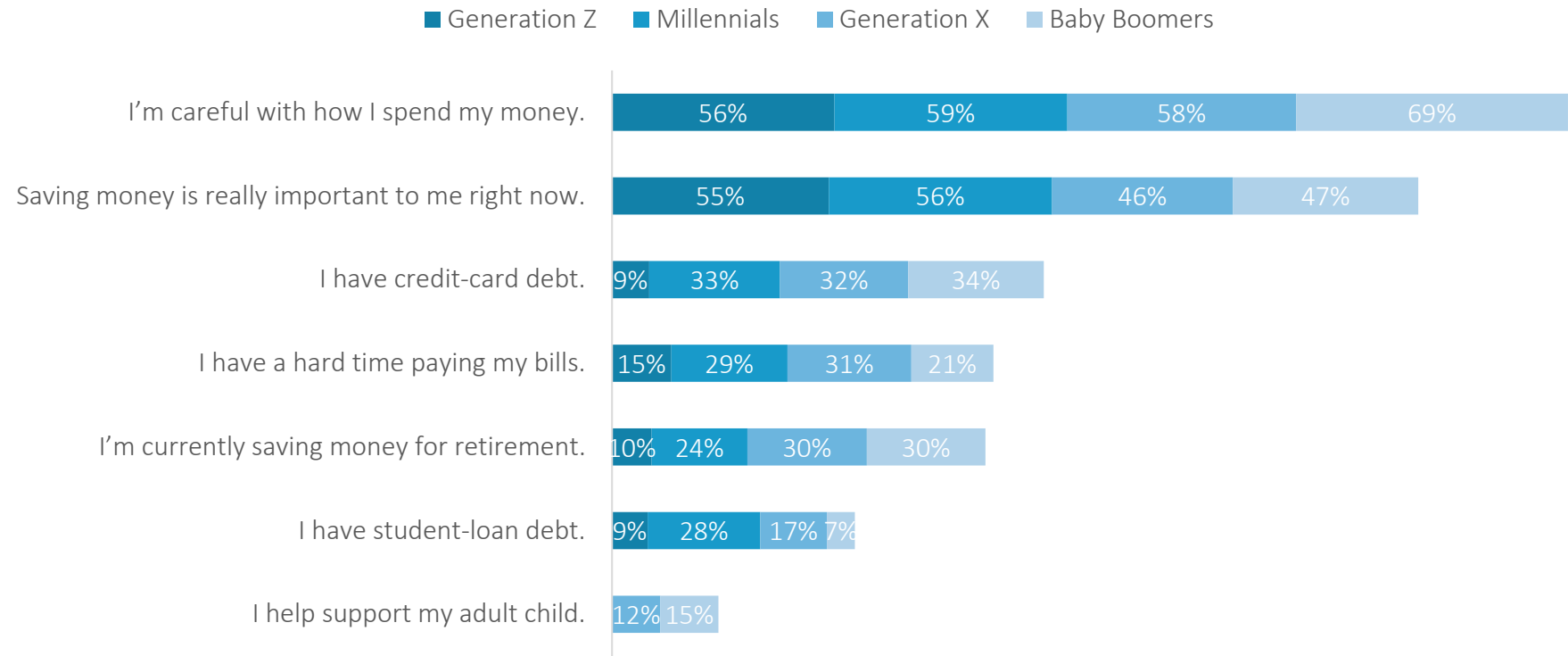
Attitudes about money



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
I'm personally concerned about the US economy.	66	↓ 49	63	↑ 68	↑ 74
It's important to me to make lots of money.	54	↑ 61	↑ 68	57	↓ 34
I consider myself more of a spender than a saver.	35	34	↑ 42	37	↓ 26
I worry about not having enough money for my retirement.	61	↓ 38	60	↑ 71	↑ 62
I'm worried about the total amount of debt I owe (including credit-card debt, loans, mortgages, etc.	43	↓ 32	↑ 50	↑ 47	↓ 36

Sample Size: 2,117 (51% of Respondents) - How much do you agree or disagree with the following statements?

Attitudes about personal finances



Baby Boomers (68%) are the most careful with spending money, while Gen Z (55%) and Millennials (56%) are the most likely to say saving is really important to them right now, particularly in light of nearly 30% of both generations having a hard time paying bills and 28% of Millennials having student-loan debt.

Sample Size: 2,117 (51% of Respondents) - Which of the following are true when it comes to your personal finances?



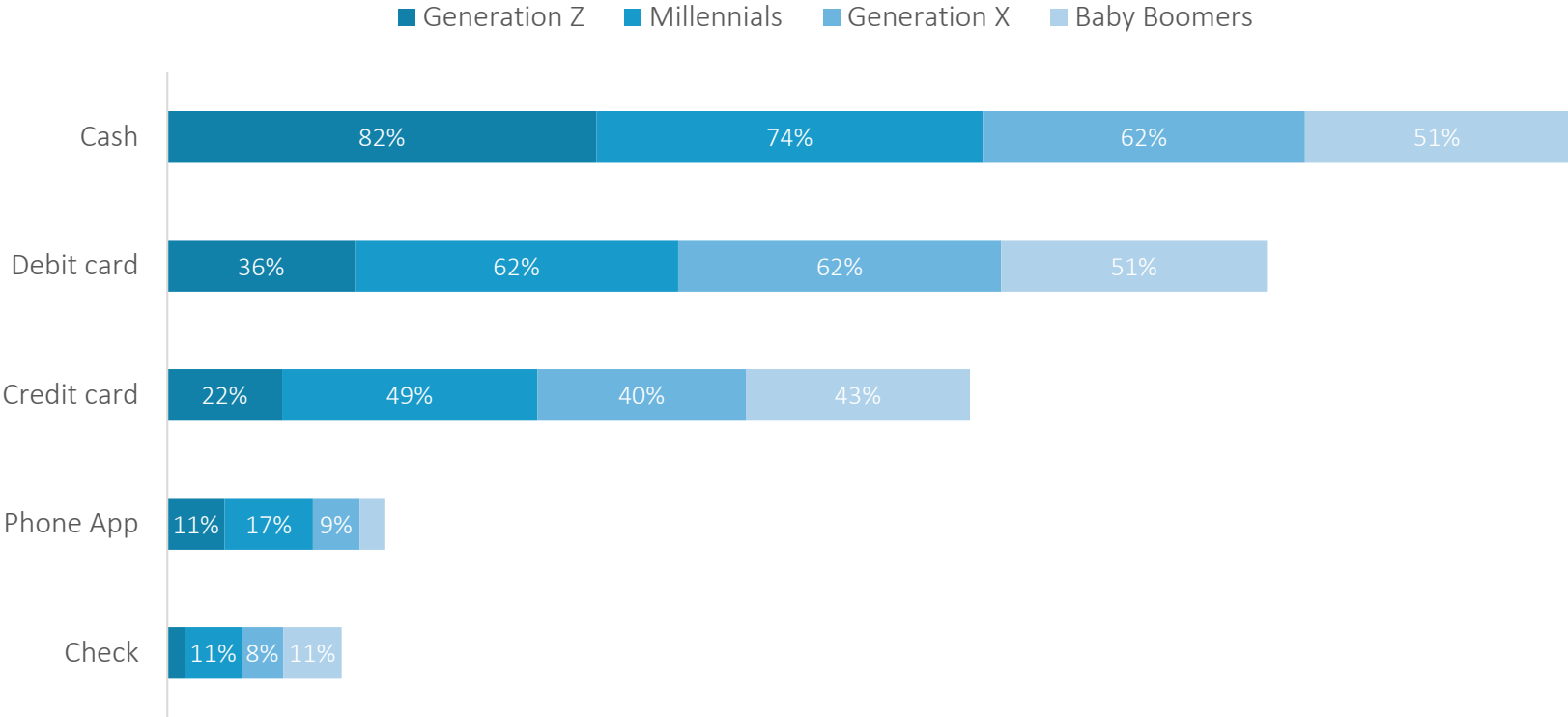
Attitudes about personal finances

GENERATION

	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
I'm careful with how I spend my money.	61	56	59	58	69
Saving money is really important to me right now.	51	55	56	46	47
I have credit-card debt.	30	9	33	32	34
I have a hard time paying my bills.	26	15	29	31	21
I'm currently saving money for retirement.	26	10	24	30	30
I have student-loan debt.	17	9	28	17	7
I help support my adult child.	8	0	0	12	15
None of the above.	6	16	6	3	4
Base	N=2117	n=500	n=566	n=540	n=511

Sample Size: 2,117 (51% of Respondents) - Which of the following are true when it comes to your personal finances?

Everyday payment preferences



Respondents prefer to pay with cash (65%) and debit cards (56%), followed by credit cards (42%). The younger the generation, the greater the cash preference. Some Millennials prefer to pay with a phone app (17%).

Sample Size: 2,033 (49% of Respondents) - Through which of the following do you prefer to pay for everyday purchases? Select all that apply.

Everyday payment preferences



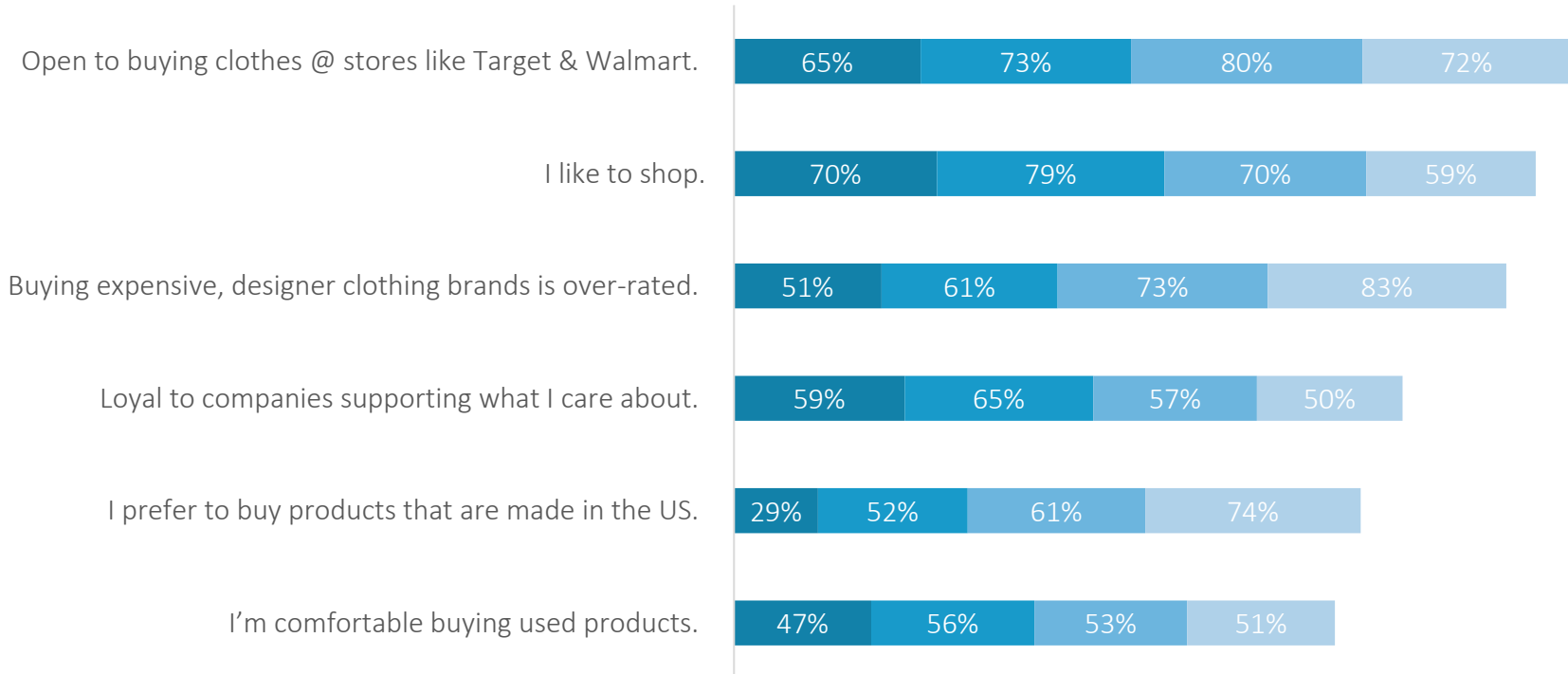
	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Cash	65	82	74	62	51
Debit card	56	36	62	62	51
Credit card	42	22	49	40	43
Phone App	10	11	17	9	5
Check	9	3	11	8	11
Other	2	5	2	2	1
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Through which of the following do you prefer to pay for everyday purchases? Select all that apply.

Buying attitudes



■ Generation Z ■ Millennials ■ Generation X ■ Baby Boomers

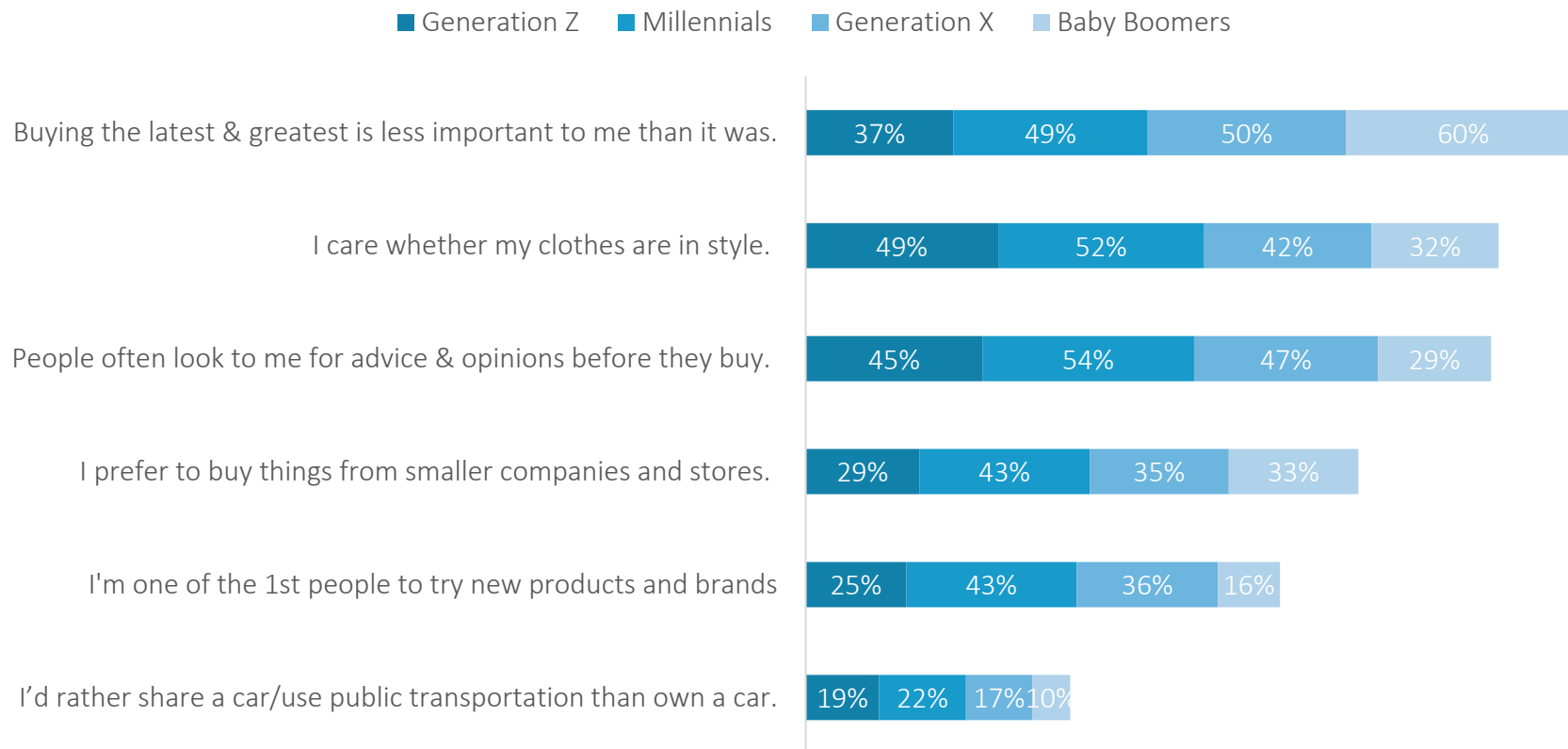


Nearly three-quarters (73%) of respondents are open to buying clothes at stores like Target and Walmart, and 69% agree that they like to shop. Buying expensive, designer clothing isn't on the minds of 67%, who agree it is overrated to buy such items.

Sample Size: 2,033 (49% of Respondents) - How much do you agree or disagree with the following statements?



Buying attitudes (cont'd.)



Boomers are the group most likely to believe that buying the “latest & greatest” is less important than it used to be (60%), while only 37% of the youngest generation, Gen Z, share that same sentiment. Compared to other generations, Boomers are also the least likely to care about whether their clothes are in style.

Sample Size: 2,033 (49% of Respondents) - How much do you agree or disagree with the following statements?

Buying attitudes

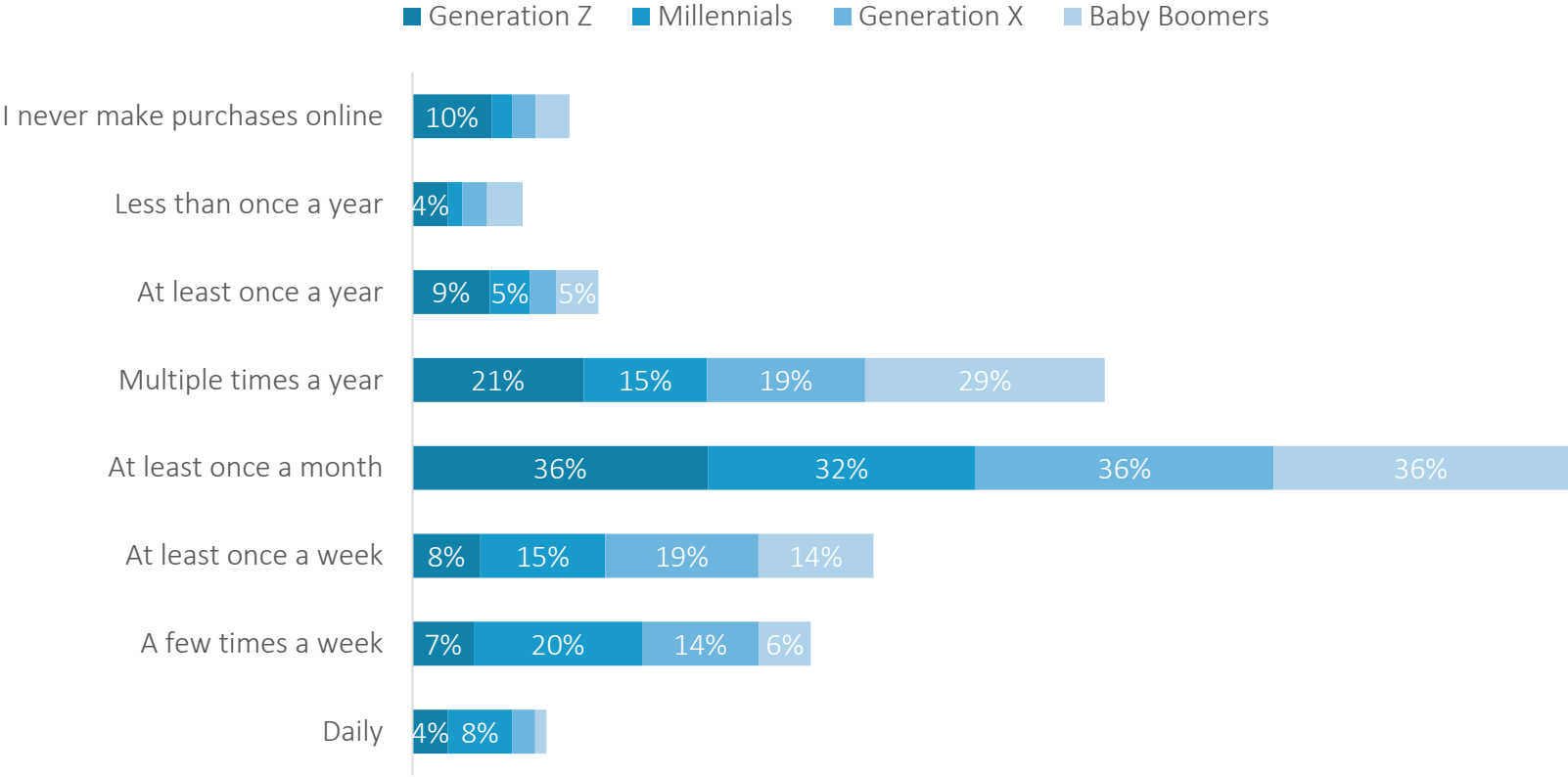


GENERATION

	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
I'm open to buying clothes at stores like Target and Walmart.	74	↓ 65	73	↑ 80	72
I like to shop.	69	70	↑ 79	70	↓ 59
Buying expensive, designer clothing brands is over-rated.	69	↓ 51	↓ 61	↑ 73	↑ 83
I prefer to buy products that are made in the US.	58	↓ 29	52	↑ 61	↑ 74
I'm loyal to companies that make sincere efforts to support causes I care about.	58	59	↑ 65	57	↓ 50
I'm comfortable buying things that someone else has owned and used.	53	↓ 47	↑ 56	53	51
Buying the latest and greatest is less important to me than it used to be.	51	↓ 37	49	50	↑ 60
People often look to me for my advice and opinions before they buy something.	43	45	↑ 54	47	↓ 29
I care whether my clothes are in style.	43	↑ 49	↑ 52	42	↓ 32
I prefer to buy things from smaller companies and stores.	36	↓ 29	↑ 43	35	33
I tend to be one of the first people to try new products and brands	31	↓ 25	↑ 43	↑ 36	↓ 16
I'd rather share a car or use public transportation than own a car.	17	19	↑ 22	17	↓ 10

Sample Size: 2,033 (49% of Respondents) - How much do you agree or disagree with the following statements?

Frequency of online buying



With access to the Internet readily available to most, shopping online has become routine. A third (35%) make an online purchase at least once a month, with 21% making multiple purchases throughout the year. Only 4% report making a daily purchase, and 3% purchase less than once a year.

Sample Size: 2,033 (49% of Respondents) - How often do you make purchases online?



Frequency of online buying

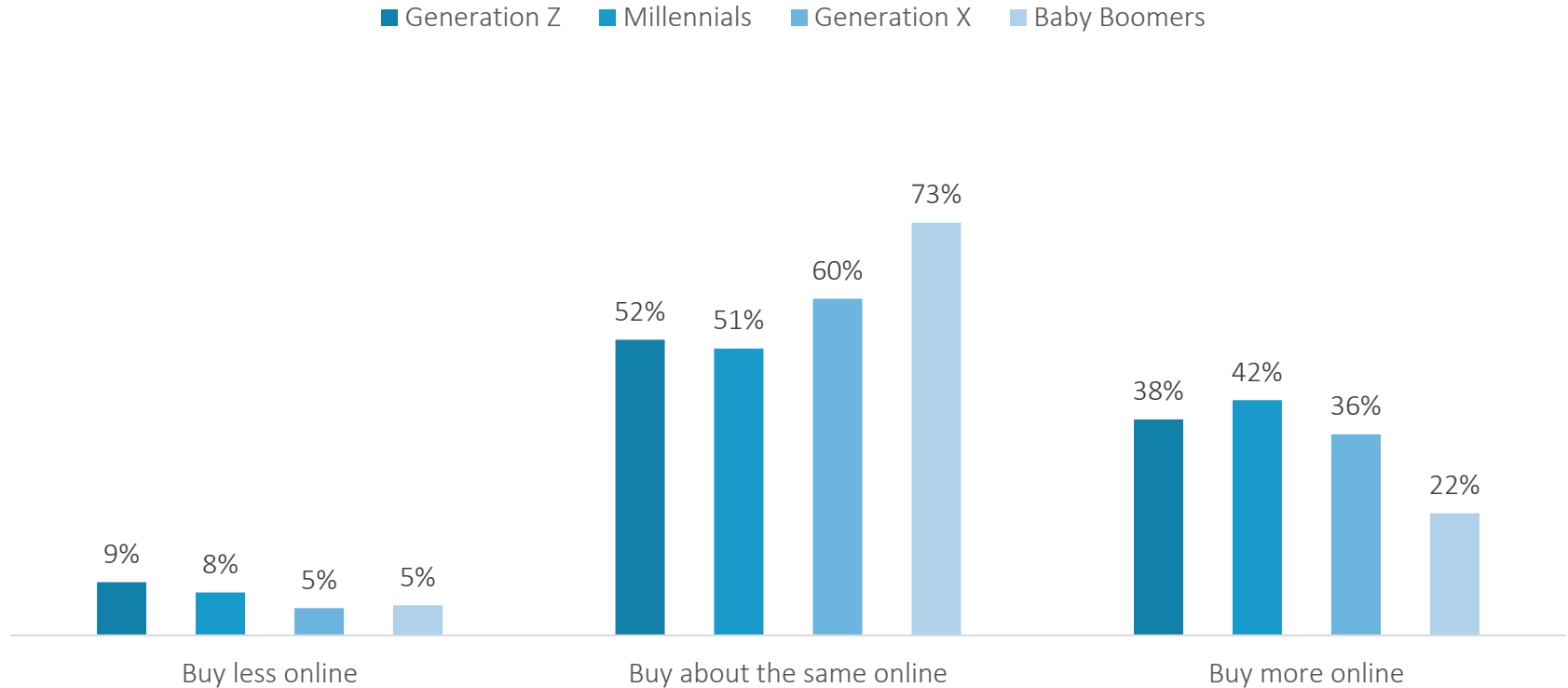
GENERATION

	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Daily	4	4	↑ 8	3	↓ 1
A few times a week	13	↓ 7	↑ 20	14	↓ 6
At least once a week	15	↓ 8	15	↑ 19	14
At least once a month	35	36	32	36	36
Multiple times a year	21	21	↓ 15	19	↑ 29
At least once a year	5	↑ 9	5	↓ 3	5
Less than once a year	3	4	↓ 2	3	4
I never make purchases online	4	↑ 10	↓ 3	↓ 3	4
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - How often do you make purchases online?



Online buying expectations



Most respondents (59%) say they will buy about the same amount online next year as this year; a third (34%) expect to buy more. Of those, Gen Z (38%) and Millennials (42%) are more inclined than others to say they will buy more.

Sample Size: 2,033 (49% of Respondents) - Next year do you think you will...?

Online buying expectations

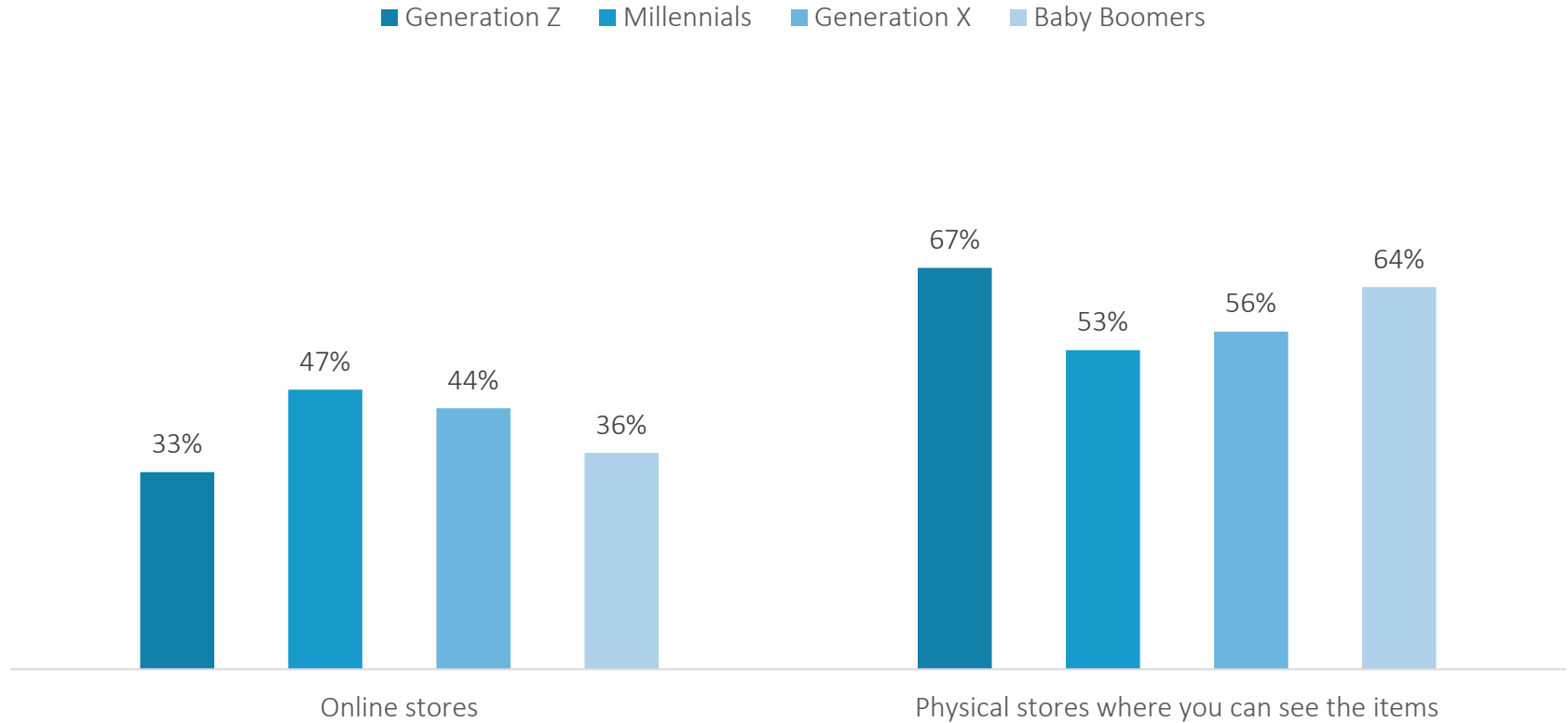


	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Buy less online	6	↑ 9	8	↓ 5	5
Buy about the same online	60	↓ 52	↓ 51	60	↑ 73
Buy more online	34	↑ 38	↑ 42	36	↓ 22
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Next year do you think you will...?



Shopping preferences: digital or physical



All generations, in different proportions, prefer to shop in-person versus online. Overall, 60% of respondents prefer to shop in physical stores where they can actually see the items.

Sample Size: 2,033 (49% of Respondents) - Overall, where do you prefer to shop?

Shopping preferences: digital or physical



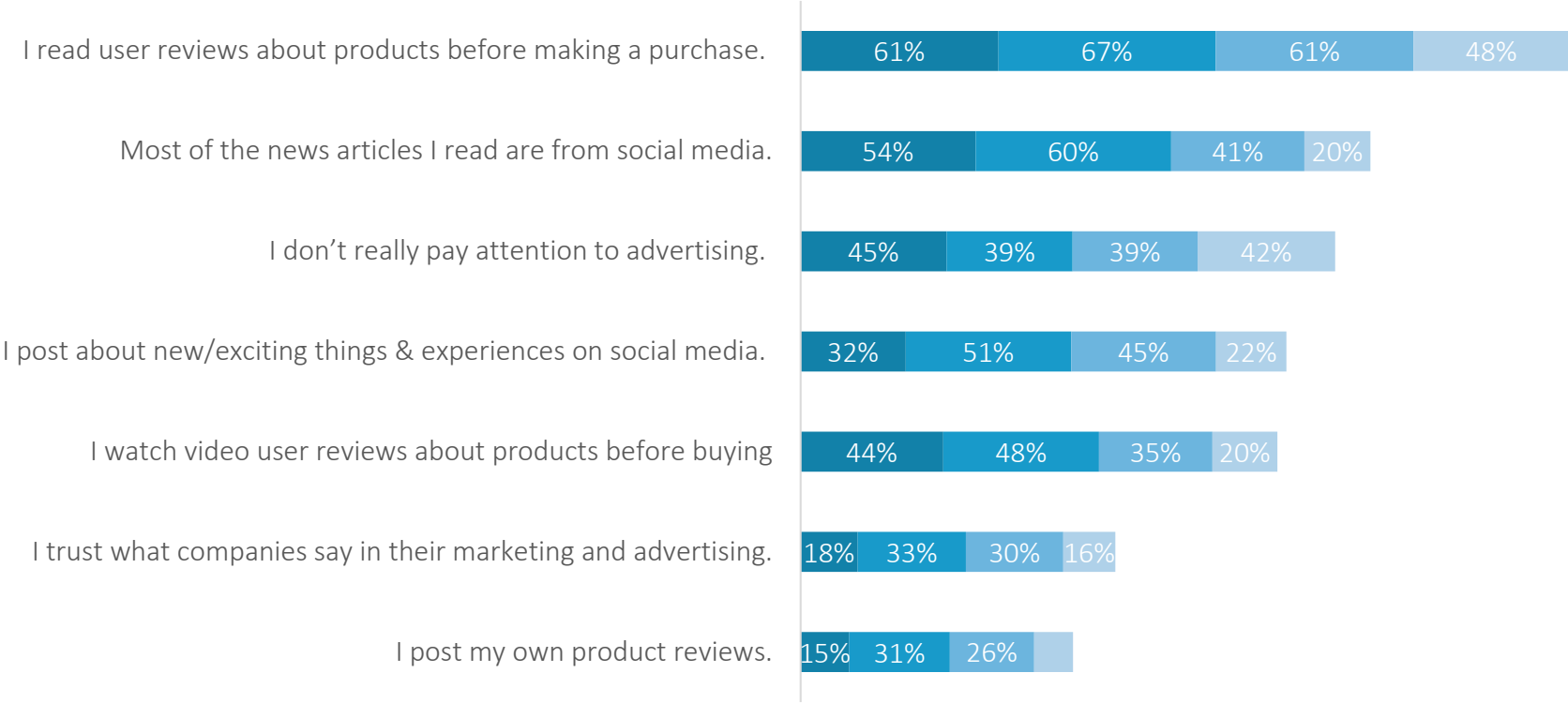
	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Physical stores where you can see the items	59	↑ 67	↓ 53	↓ 56	↑ 64
Online stores	41	↓ 33	↑ 47	↑ 44	↓ 36
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Overall, where do you prefer to shop?

Purchase influences



■ Generation Z ■ Millennials ■ Generation X ■ Baby Boomers



A majority of Gen Z (54%) and Millennials (60%) consume the majority of their news on social media, compared to 30% of all other respondents. Gen Xers (45%) and Millennials (51%) are most likely to post on social media after experiencing something new, exciting, or interesting.

Sample Size: 2,117 (51% of Respondents) - How much do you agree or disagree with the following statements?

Purchase influences



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
Most of the news articles I read are from social media.	43	↑ 54	↑ 60	41	↓ 20
I don't really pay attention to advertising.	41	↑ 45	39	39	42
When I experience something new, exciting or interesting, I post about it on social media.	38	↓ 32	↑ 51	↑ 45	↓ 22
I trust what companies say in their marketing and advertising.	25	↓ 18	↑ 33	↑ 30	↓ 16
Read user reviews about products before making a purchase.	59	61	↑ 67	61	↓ 48
Watch video user reviews about products before making a purchase.	36	↑ 44	↑ 48	35	↓ 20
Post my own product reviews.	22	↓ 15	↑ 31	↑ 26	↓ 12

Sample Size: 2,117 (51% of Respondents) - How much do you agree or disagree with the following statements?

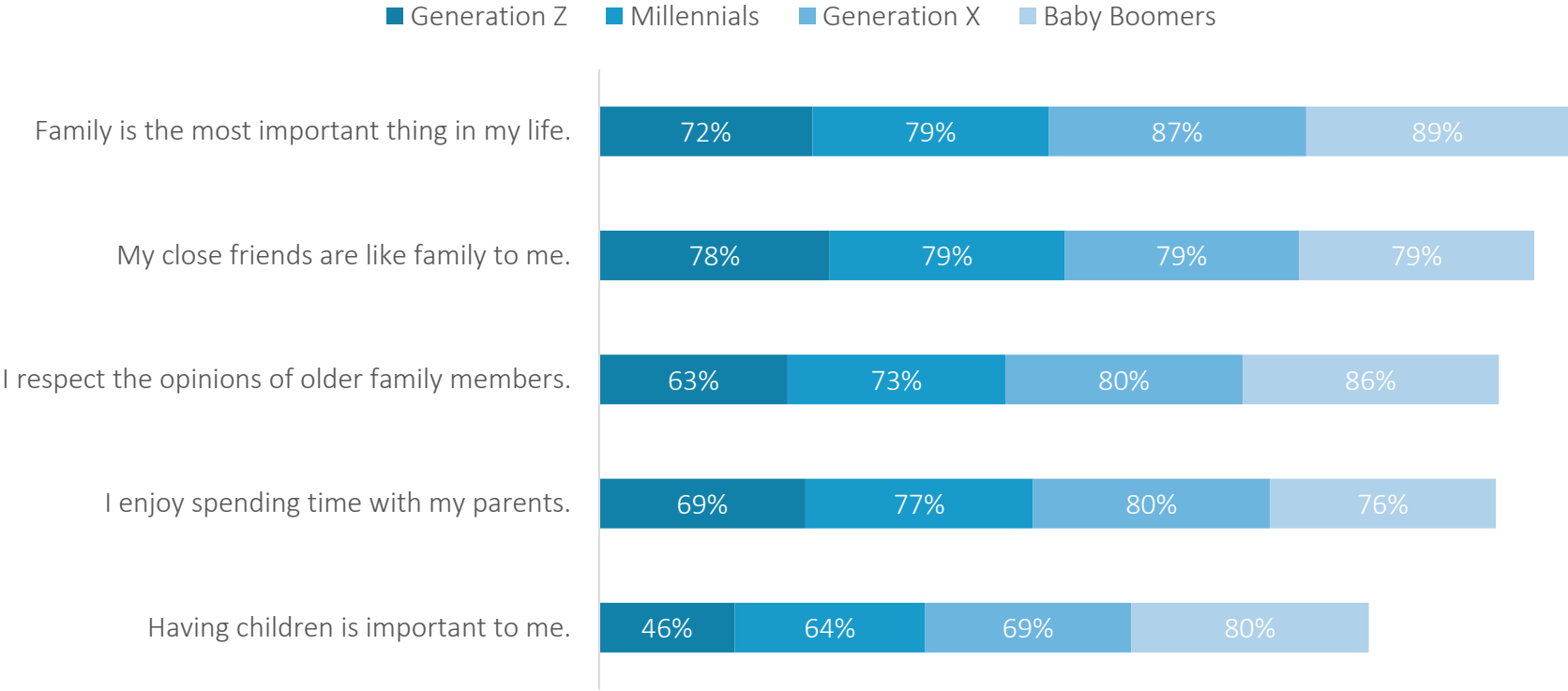
Favorite brands



Generation Z		Millennials		Generation X		Boomers	
Nike	11.3%	Nike	8.9%	Nike	7.2%	Levi's	5.4%
Adidas	5.0%	Adidas/Amazon	3.8%	Levi's	4.3%	Nike	3.9%
Apple	3.2%	Apple	3.6%	Amazon	3.0%	Apple	3.2%
Pink/Victoria's Secret	2.8%	Samsung	2.7%	Apple	2.5%	Amazon/ Samsung	2.4%
Forever 21	2.7%	Walmart	2.3%	Samsung	2.3%	Walmart	1.9%
American Eagle	2.2%	Target	2.2%	Sony/PS	2.0%	Wrangler	1.7%
Hollister/ Vans	2.1%	Sony/Pink	1.8%	Adidas/Polo/ Walmart	1.8%	Hanes	1.5%
H&M	2.0%	Old Navy	1.6%	Under Armour	1.6%	Polo/Lauren	1.4%
Amazon/ Converse	1.8%	Levi's	1.6%	Old Navy	1.3%	Adidas/Coach/LG/MK	1.1%
Under Armour	1.7%	Polo/Lauren	1.5%	Wrangler	1.2%	Coke/Under Armour/Lee	0.9%
Sony/ Microsoft	1.6%	Forever 21/GAP/Jordan	1.3%	GAP/Target	1.1%	Sony	0.8%
Hot Topic/Target	1.4%	Google/Under Armour	1.2%	Coach/Dell/MK/Hanes	0.9%	LLBean/Target/Toyota	0.7%
Nintendo/ Samsung	1.3%	Gucci/Puma	1.1%	Kohl's	0.7%	New Balance/Pepsi/ Reebok	0.7%
Aeropostale/Walmart	1.2%	ebay/Hollister	1.0%	Gucci	0.6%	HP/Calvin Klein	0.6%
Jordan	1.1%	American Eagle	0.8%	American Eagle	0.5%	GAP	0.5%

Sample Size: 2,033 (49% of Respondents) - Thinking about all of the brands that you're aware of (whether you buy them or not), across all types of products and services, which three are your TOP favorite? Write in up to three.

Attitudes around family



Family and friends are incredibly important, with a total of 80% agreeing that family is the most important thing in life. While 88% of Boomers and Xers valued family above all, fewer of Gen Z do (77%), being in the thick of parent-teen turmoil. Seventy seven percent say their close friends are like family to them, and 70% or more enjoy spending time with parents.

Sample Size: 2,076 (50% of Respondents) - How much do you agree or disagree with the following statements

Attitudes around family



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
Family is the most important thing in my life.	83	↓ 72	79	↑ 87	↑ 89
My close friends are like family to me.	79	78	79	79	79
I respect the opinions of older family members.	78	↓ 63	73	↑ 80	↑ 86
I enjoy spending time with my parents.	77	↓ 69	77	↑ 80	76
Having children is important to me.	68	↓ 46	64	↑ 69	↑ 80

Sample Size: 2,076 (50% of Respondents) - How much do you agree or disagree with the following statements

Childhood and family perceptions

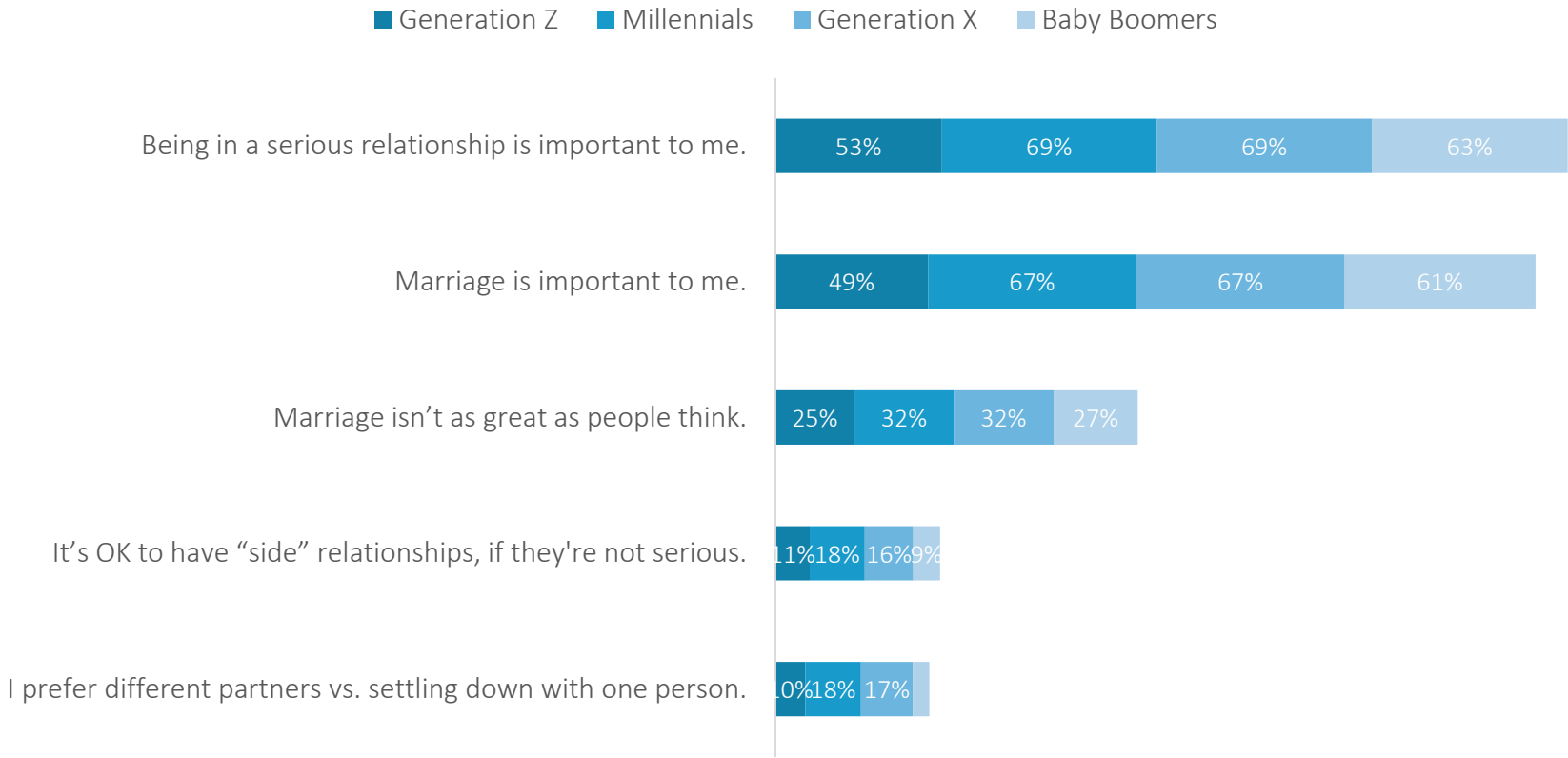
GENERATION



	Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
We regularly ate meals together as a family.	72	52	↓ 64	70	↑ 84
My parent(s) followed through with discipline if I broke rules.	68	48	↓ 59	67	↑ 80
I was responsible for doing regular household chores.	66	58	↓ 58	65	↑ 77
My parent(s) often talked to me about what's right and wrong.	61	55	62	↓ 57	63
At least one of my parent(s) was home when I came home from school.	61	57	↓ 57	↓ 57	↑ 70
We had lots of fun and laughter.	59	56	↑ 62	↓ 55	59
My parent(s) always wanted to know what was going on with my friends and me.	54	44	55	51	55
My parent(s) were involved with my school and would communicate with my teachers.	47	35	49	47	46
My parent(s) were very strict.	43	30	41	42	↑ 47
My parent(s) helped me with homework.	39	26	↑ 47	40	↓ 29
My parent(s) would spank/hit me if I misbehaved.	34	8	33	35	34
We would often get mad and yell at each other.	30	31	↑ 38	32	↓ 20
We had open discussions about drinking and drugs.	24	16	↑ 29	↑ 28	↓ 14
My parent(s) acted more like friends than parents.	20	19	↑ 25	22	↓ 11

Sample Size: 2,117 (51% of Respondents) - Thinking about your childhood, how often did the following happen in your family life?

Attitudes around relationships



Roughly two-thirds of all respondents say being in a serious relationship is important to them (64%), and nearly as many believe in the importance of marriage (61%); with Gen Z falling lower overall for life stage reasons. Having a “side” relationship or multiple partners are not situations that many agree with (13% each).

Sample Size: 2,117 (51% of Respondents) - How much do you agree or disagree with the following statements?

Attitudes around relationships

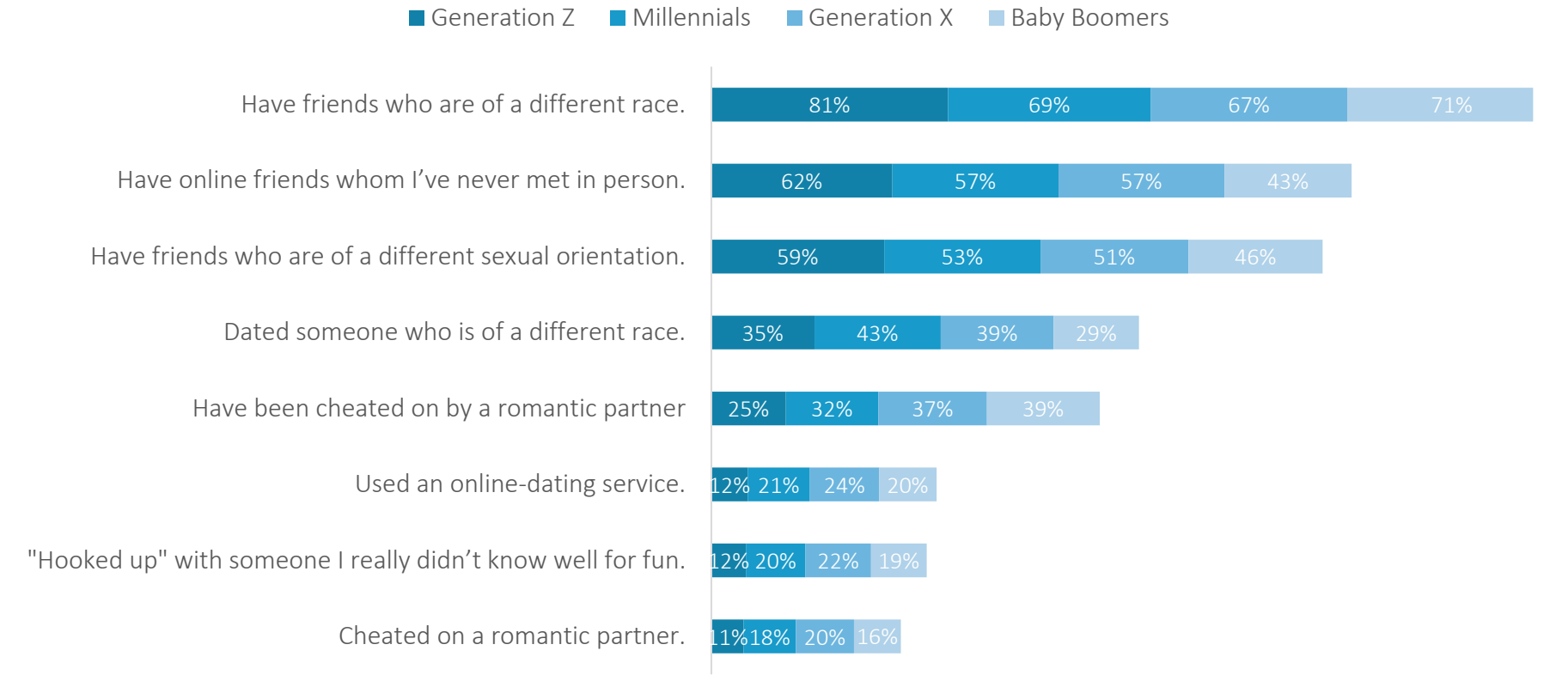


GENERATION

	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
Being in a serious relationship is important to me.	65	↓ 53	↑ 69	↑ 69	63
Marriage is important to me.	63	↓ 49	↑ 67	↑ 67	61
Marriage isn't as great as people think.	30	↓ 25	32	32	27
It's OK to have "side" relationships, as long as they don't get serious.	14	11	↑ 18	16	↓ 9
I prefer having different partners instead of settling down with one person.	13	↓ 10	↑ 18	↑ 17	↓ 5

Sample Size: 2,117 (51% of Respondents) - How much do you agree or disagree with the following statements?

Attitudes around romance and friendship



When it comes to platonic and romantic relationships, respondents most frequently say they have one or more friends of a different race (73%) – including 81% for Gen Z. More than half overall have friends they have never met before (53%), and one or more friends of a different sexual orientation (51%).

Sample Size: 2,117 (51% of Respondents) - Which of the following are true for you? Select all that apply.

Attitudes around romance and friendship

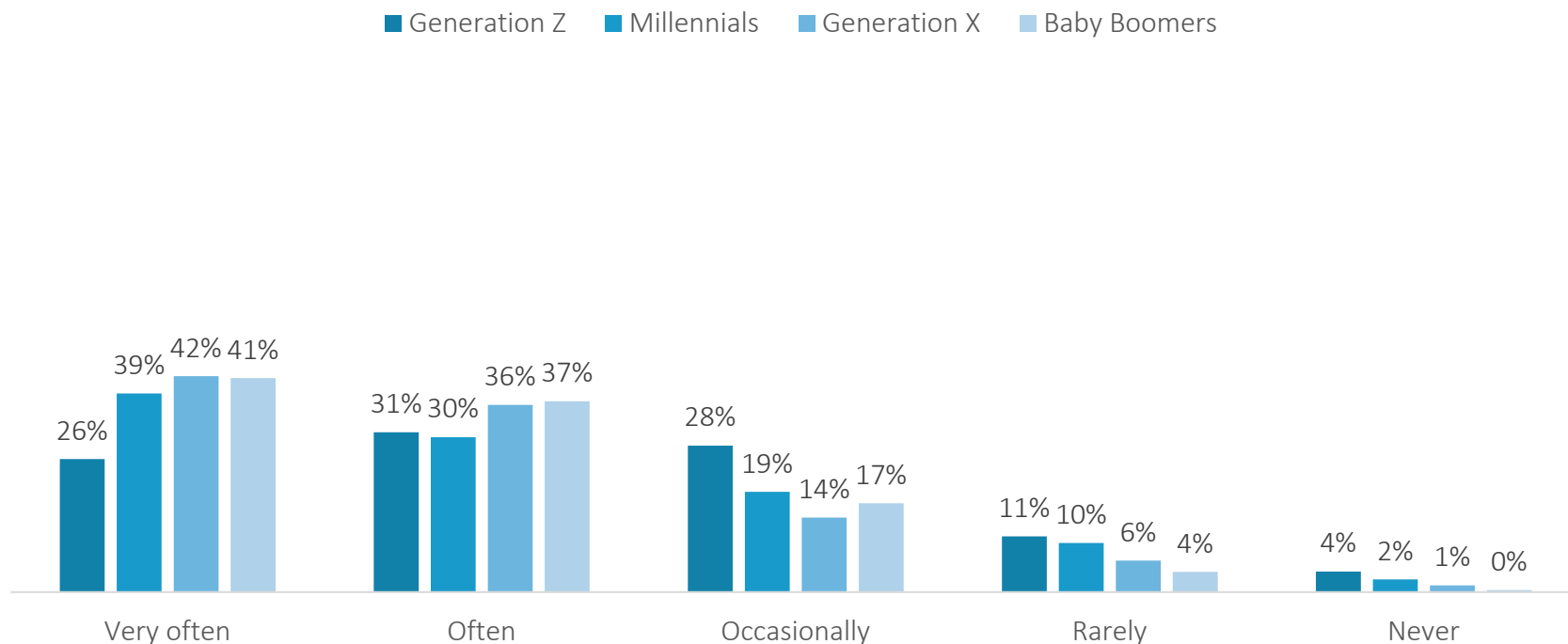


	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
I have one or more friends who are of a different race than me.	71	81	69	67	71
I have online friends whom I've never met in person.	53	62	57	57	43
I have one or more friends who are of a different sexual orientation than me.	51	59	53	51	46
I have dated someone who is of a different race than me.	37	35	43	39	29
I have been cheated on by a romantic partner	34	25	32	37	39
I have used an online-dating service.	20	12	21	24	20
I have "hooked up" with someone I really didn't know that well, just for fun.	19	12	20	22	19
I have cheated on a romantic partner.	17	11	18	20	16
Base	N=2117	n=500	n=566	n=540	n=511

Sample Size: 2,117 (51% of Respondents) - Which of the following are true for you? Select all that apply.



Viewing frequency – TV & movies



For most, watching TV programs or movies is a regular thing; 71% of respondents report watching TV programs or movies often or very often. Generation Z are the least regular viewers; only 26% watch very often, compared to 40% of older generations.

Sample Size: 2,117 (51% of Respondents) - How often do you watch TV programs or movies?

Viewing frequency – TV & movies

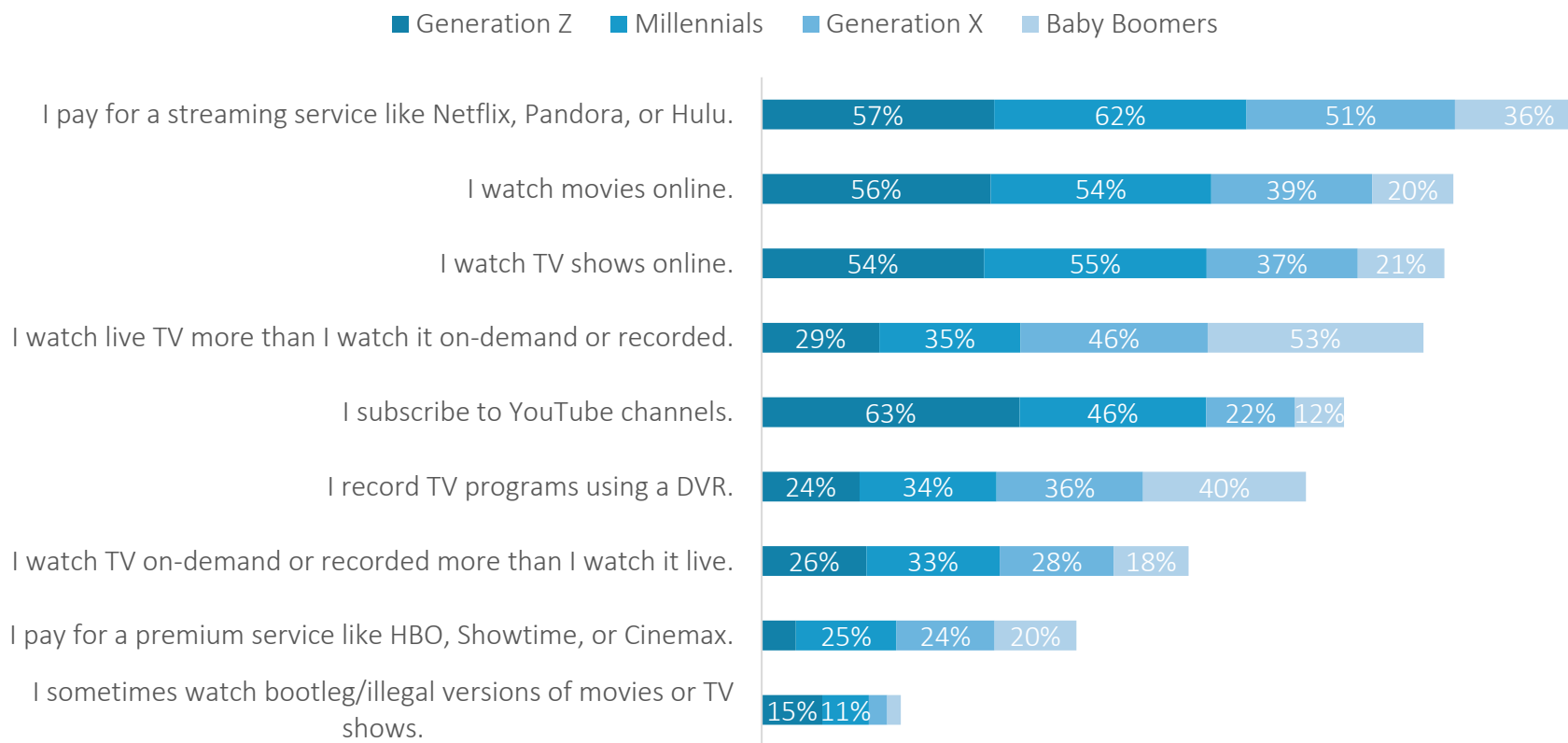


	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
[Bottom-Two Box]	9	↑ 15	↑ 12	↓ 7	↓ 4
Never	2	↑ 4	2	1	↓ <1
Rarely	7	↑ 11	↑ 10	6	↓ 4
Occasionally	19	↑ 28	19	↓ 14	17
Often	34	31	↓ 30	36	37
Very often	39	↓ 26	39	↑ 42	↑ 41
[Top-Two Box]	73	↓ 57	69	↑ 78	↑ 78
Base	N=2117	n=500	n=566	n=540	n=511

Sample Size: 2,117 (51% of Respondents) - How often do you watch TV programs or movies?



Viewing habits



Just over half of all respondents (51%) pay for a streaming service like Netflix, Pandora, or Hulu. Gen Z and Millennials are more likely to watch movies and TV online (about 55% each), while Gen X (46%) and Baby Boomers (53%) are more likely to watch TV live than on-demand or recorded. And, a full 63% of Gen Z subscribe to YouTube channels.

Sample Size: 2,074 (50% of Respondents) - Which of the following statements about watching TV programs or movies are true for you?

Viewing habits

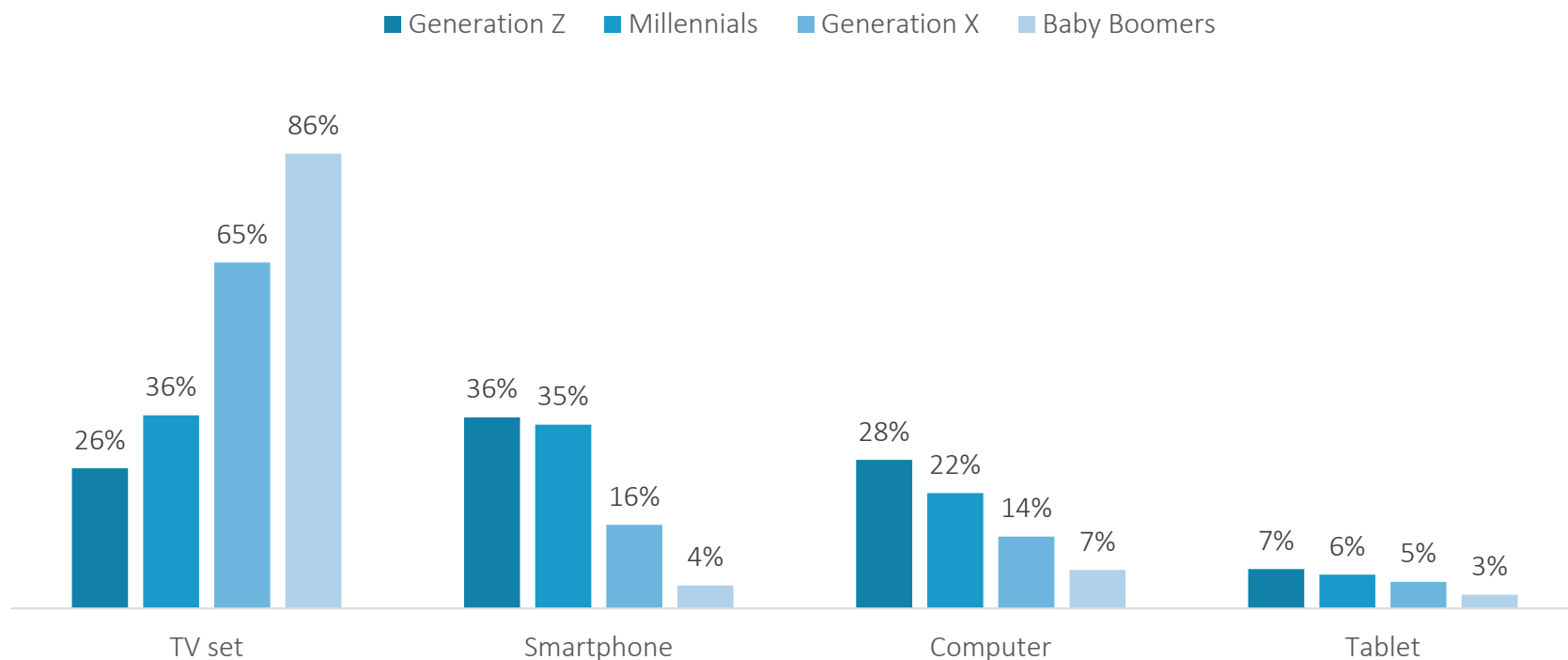


	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
I pay for a streaming service like Netflix, Pandora, or Hulu.	51	57	62	51	36
I watch live TV more than I watch it on-demand or recorded.	42	29	35	46	53
I watch TV shows online.	40	54	55	37	21
I watch movies online.	40	56	54	39	20
I record TV programs using a DVR.	35	24	34	36	40
I subscribe to YouTube channels.	31	63	46	22	12
I watch TV on-demand or recorded more than I watch it live.	26	26	33	28	18
I pay for a premium service like HBO, Showtime, or Cinemax.	21	8	25	24	20
I sometimes watch bootleg/illegal versions of movies or TV shows.	8	15	11	5	3
Base	N=2074	n=480	n=552	n=533	n=509

Sample Size: 2,074 (50% of Respondents) - Which of the following statements about watching TV programs or movies are true for you?



Device used most often to watch programs



Baby Boomers (86%) and Gen Xers (65%) show a strong preference for shows and movies on actual TV sets. Millennials and Gen Z are more open to using smartphones (35%, 36%) or computers (22%, 28%). Nearly a quarter of all respondents (23%) prefer smartphones over any other device.

Sample Size: 2,117 (51% of Respondents) - On what device do you most often watch programs (like TV shows, movies and videos)? Select one.

Device used most often to watch programs

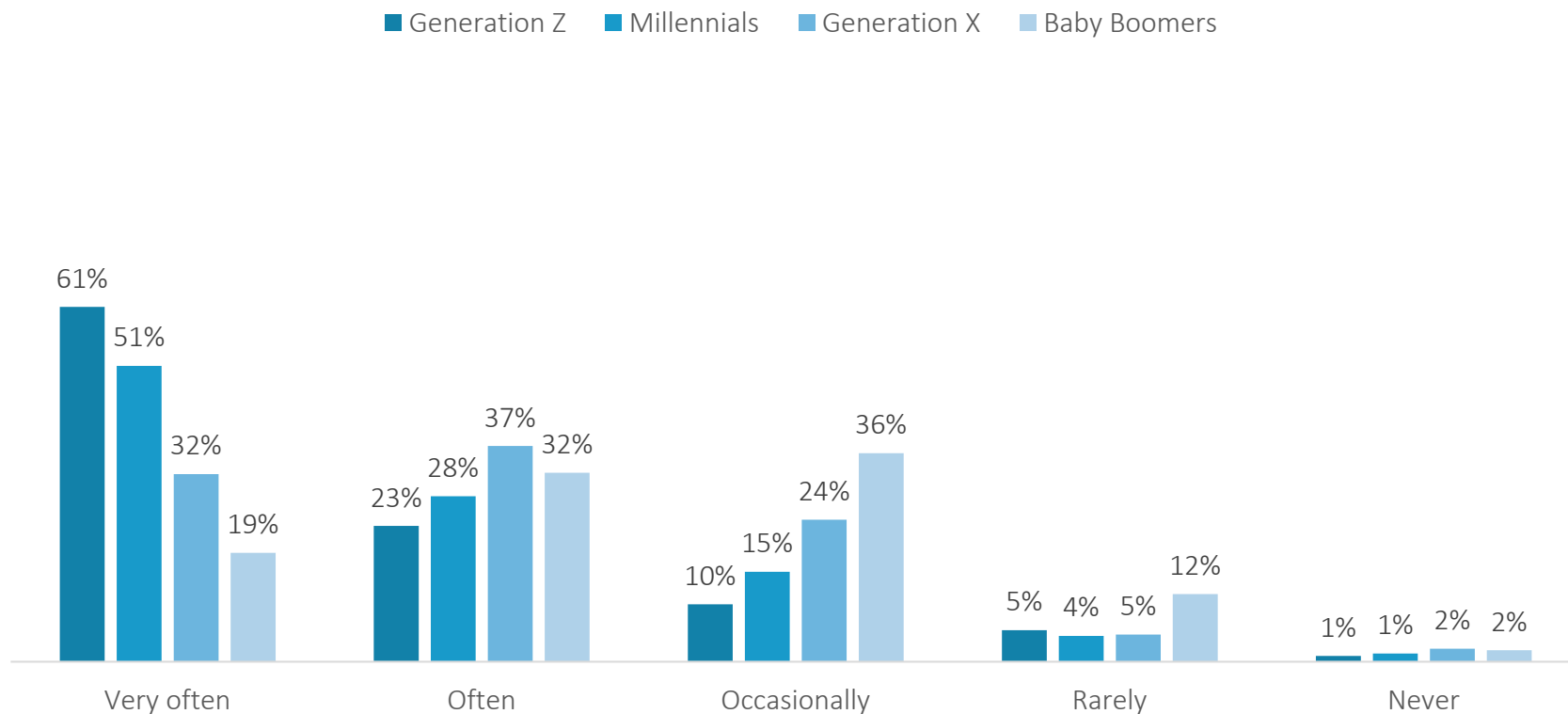


	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
TV set	58	↓ 26	↓ 36	↑ 65	↑ 86
Smartphone	21	↑ 36	↑ 35	↓ 16	↓ 4
Computer	16	↑ 28	↑ 22	↓ 14	↓ 7
Tablet	5	↑ 7	6	5	↓ 3
Other	1	↑ 2	1	1	↓ <1
Base	N=2117	n=500	n=566	n=540	n=511

Sample Size: 2,117 (51% of Respondents) - On what device do you most often watch programs (like TV shows, movies and videos)? Select one.



Music: how often they listen



Listening to music is more popular among the younger generations. Baby Boomers most often listen to music "occasionally" (36%), Gen Xers "often" (37%), and both Millennials (51%) and Gen Z (61%) "very often."

Sample Size: 2,117 (51% of Respondents) - How often do you listen to music?

Music: how often they listen

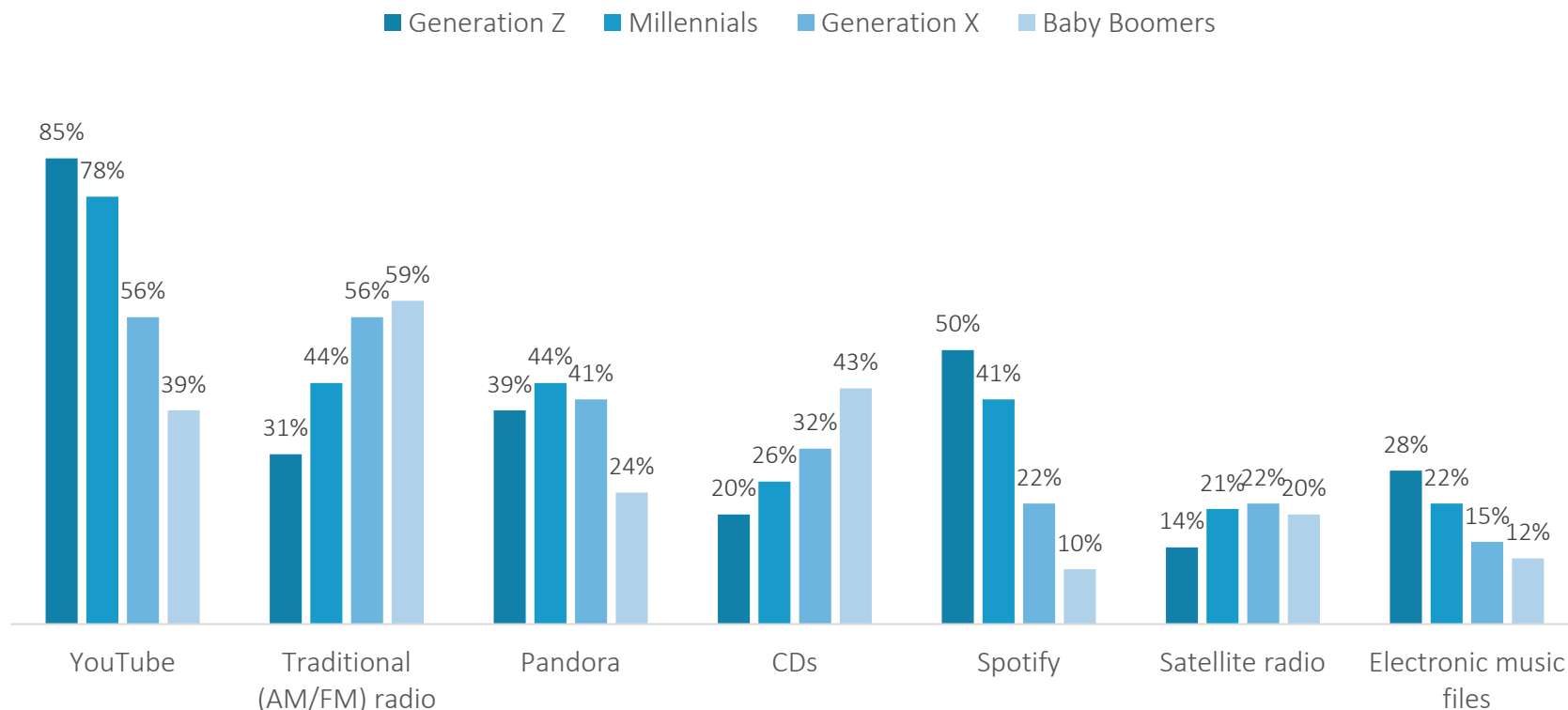


	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
[Bottom-Two Box]	8	6	↓ 6	7	↑ 14
Never	2	1	1	2	2
Rarely	7	5	↓ 4	↓ 5	↑ 12
Occasionally	23	↓ 10	↓ 15	↑ 24	↑ 36
Often	31	↓ 23	28	↑ 37	32
Very often	37	↑ 61	↑ 51	↓ 32	↓ 19
[Top-Two Box]	69	↑ 84	↑ 79	69	↓ 51
Base	N=2117	n=500	n=566	n=540	n=511

Sample Size: 2,117 (51% of Respondents) - How often do you listen to music?



Music: how they listen



For the younger generations, Gen Z and Millennials, YouTube is the most popular medium for listening to music. Other online options such as Pandora and Spotify also do well among the younger set. Traditional (AM/FM) radio is the source used most often by Boomers. The same percentage of Gen Xers (56%) rely on Traditional (AM/FM) radio and YouTube.

Sample Size: 2,082 (50% of Respondents) - Which of the following do use for listening to music? Select all that apply.

Music: how they listen



GENERATION

	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
YouTube	61	85	78	56	39
Traditional (AM/FM) radio	50	31	44	56	59
Pandora	36	39	44	41	24
CDs	32	20	26	32	43
Spotify	28	50	41	22	10
Satellite radio	20	14	21	22	20
Electronic music files	18	28	22	15	12
Google Play	17	20	27	14	9
Apple Music	16	22	25	15	5
Soundcloud	13	26	21	10	2
Base	N=2082	n=495	n=558	n=528	n=501

Sample Size: 2,082 (50% of Respondents) - Which of the following do use for listening to music? Select all that apply.

Music: Favorite genre



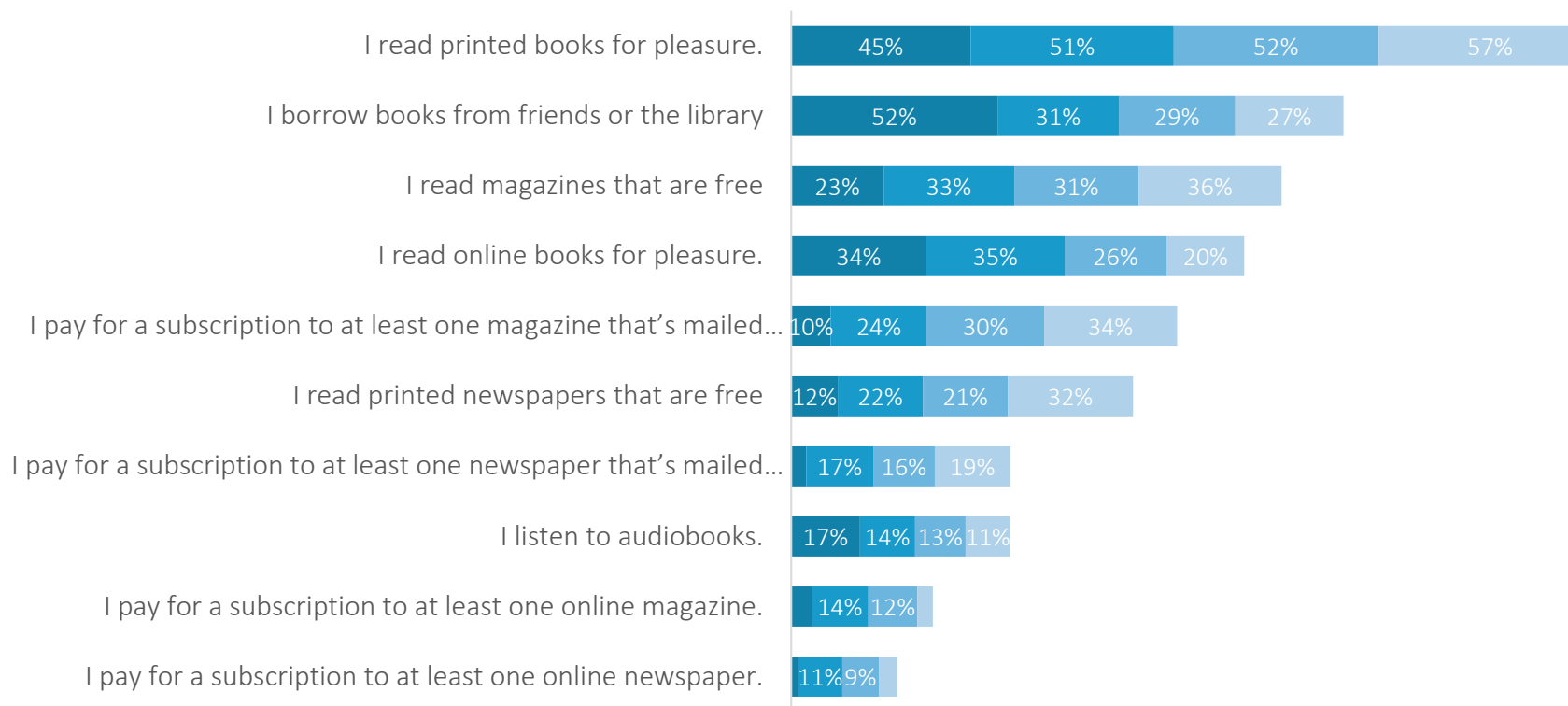
	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Classic rock	28	13	17	29	44
Country	24	16	23	26	29
Rap/Hip-hop	23	48	38	16	4
80s music	22	11	14	35	23
90s music	20	15	32	25	7
Top-40/Pop	17	20	22	17	9
70s music	16	4	3	17	34
Electronic/dance	13	21	23	9	4
Classical	13	10	14	13	13
Christian/Spiritual	12	6	8	14	16
Modern rock	12	15	16	13	5
Base	N=2082	n=495	n=558	n=528	n=501

Sample Size: 2,082 (50% of Respondents) - What's your favorite kind of music to listen to (select up to three).

Reading habits



■ Generation Z ■ Millennials ■ Generation X ■ Baby Boomers



Half of respondents (52%) read printed books for pleasure, while Gen Z is the most likely to borrow books from friends or the library (52%). Gen Xers and Millennials are most likely to pay for online magazine and newspaper subscriptions. Baby Boomers prefer free magazines (36%) and newspapers (32%) more than other generations.

Sample Size: 2,117 (51% of Respondents) - Which of the following statements describe what or how you read? Select all that apply.

Reading habits

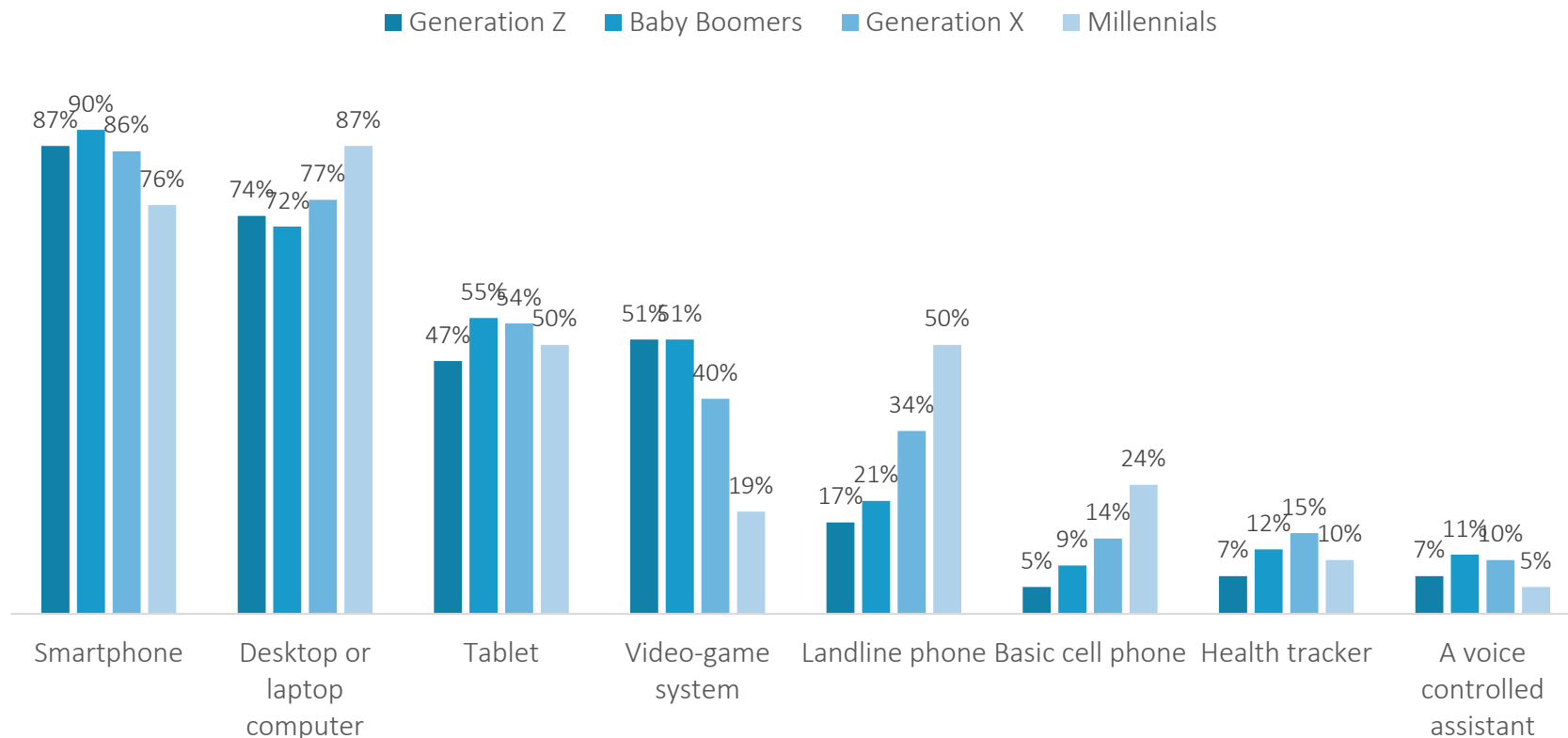


GENERATION

	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
I read printed books for pleasure.	52	45	51	52	57
I read magazines that are free	32	23	33	31	36
I borrow books from friends or the library	32	52	31	29	27
I read online books for pleasure.	28	34	35	26	20
I pay for a subscription to at least one magazine that's mailed to my home.	27	10	24	30	34
I read printed newspapers that are free	23	12	22	21	32
I pay for a subscription to at least one newspaper that's mailed to my home.	16	4	17	16	19
I listen to audiobooks.	13	17	14	13	11
I pay for a subscription to at least one online magazine.	10	5	14	12	4
I pay for a subscription to at least one online newspaper.	8	2	11	9	5
Base	N=2117	n=500	n=566	n=540	n=511

Sample Size: 2,117 (51% of Respondents) - Which of the following statements describe what or how you read? Select all that apply.

Devices personally owned and used



The three most popular devices owned and used by respondents are smartphones (85%), desktop/laptop computers (77%), and tablets (52%). Half of Gen Z and Millennials have video-game systems (51%), while as many Baby Boomers have a landline phone (50%).

Sample Size: 2,117 (51% of Respondents) – Which of the following do you own and use? Select all that apply.

Devices personally owned and used



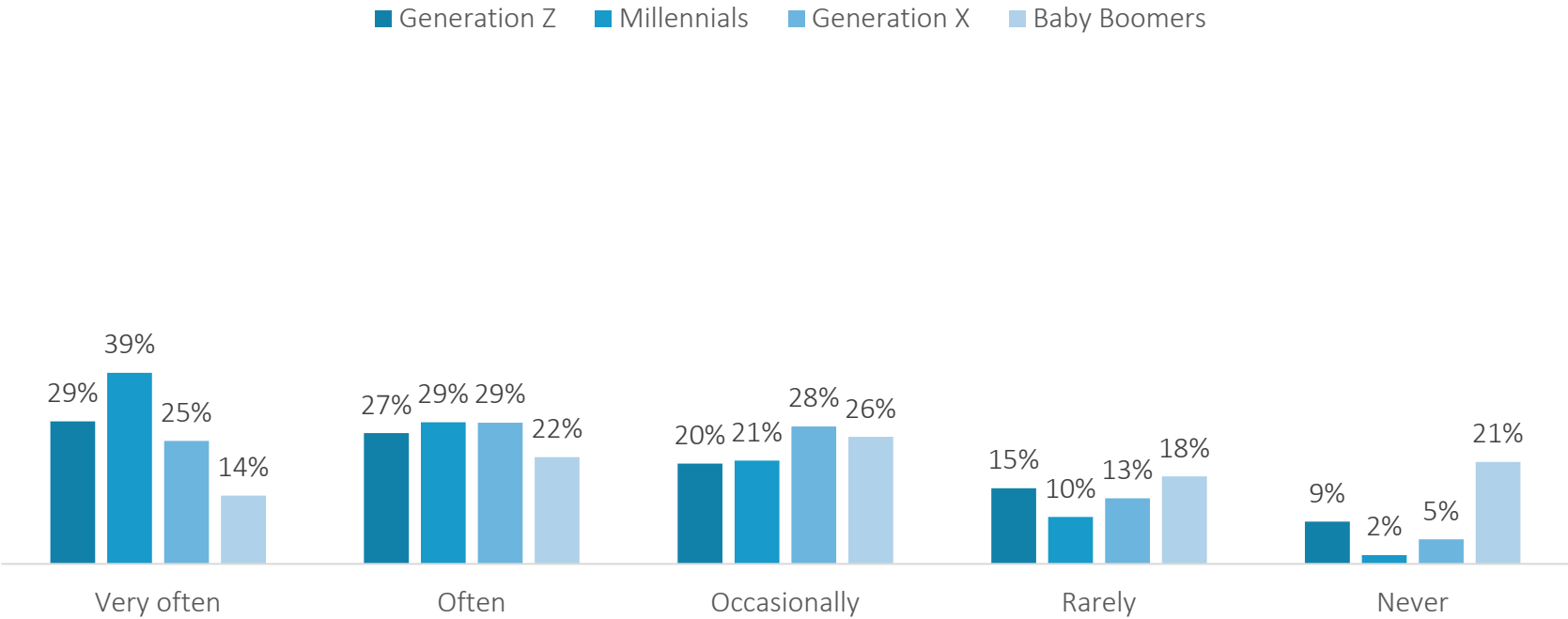
GENERATION

	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Smartphone	84	87	90	86	76
Desktop or laptop computer	78	74	72	77	87
Tablet	53	47	55	54	50
Video-game system	38	51	51	40	19
Landline phone	33	17	21	34	50
Basic cell phone	14	5	9	14	24
Health tracker	12	7	12	15	10
A voice controlled assistant	9	7	11	10	5
One or more "smart" devices	8	10	8	8	6
Virtual-reality headset	6	7	9	7	3
Drone	5	7	7	4	2
An alternative-powered vehicle	2	3	2	2	2
Base	N=2117	n=500	n=566	n=540	n=511

Sample Size: 2,117 (51% of Respondents) – Which of the following do you own and use? Select all that apply.



Frequency of social media viewing/posting



Most respondents use social media platforms regularly: 54% view or post on social often or very often. Millennials are the most frequent users (68%). Just 9% never touch any social media.

Sample Size: 2,117 (51% of Respondents) - How often do you view or post on social media (such as Facebook, Instagram, Twitter, or Snapchat)?

Frequency of social media viewing/posting

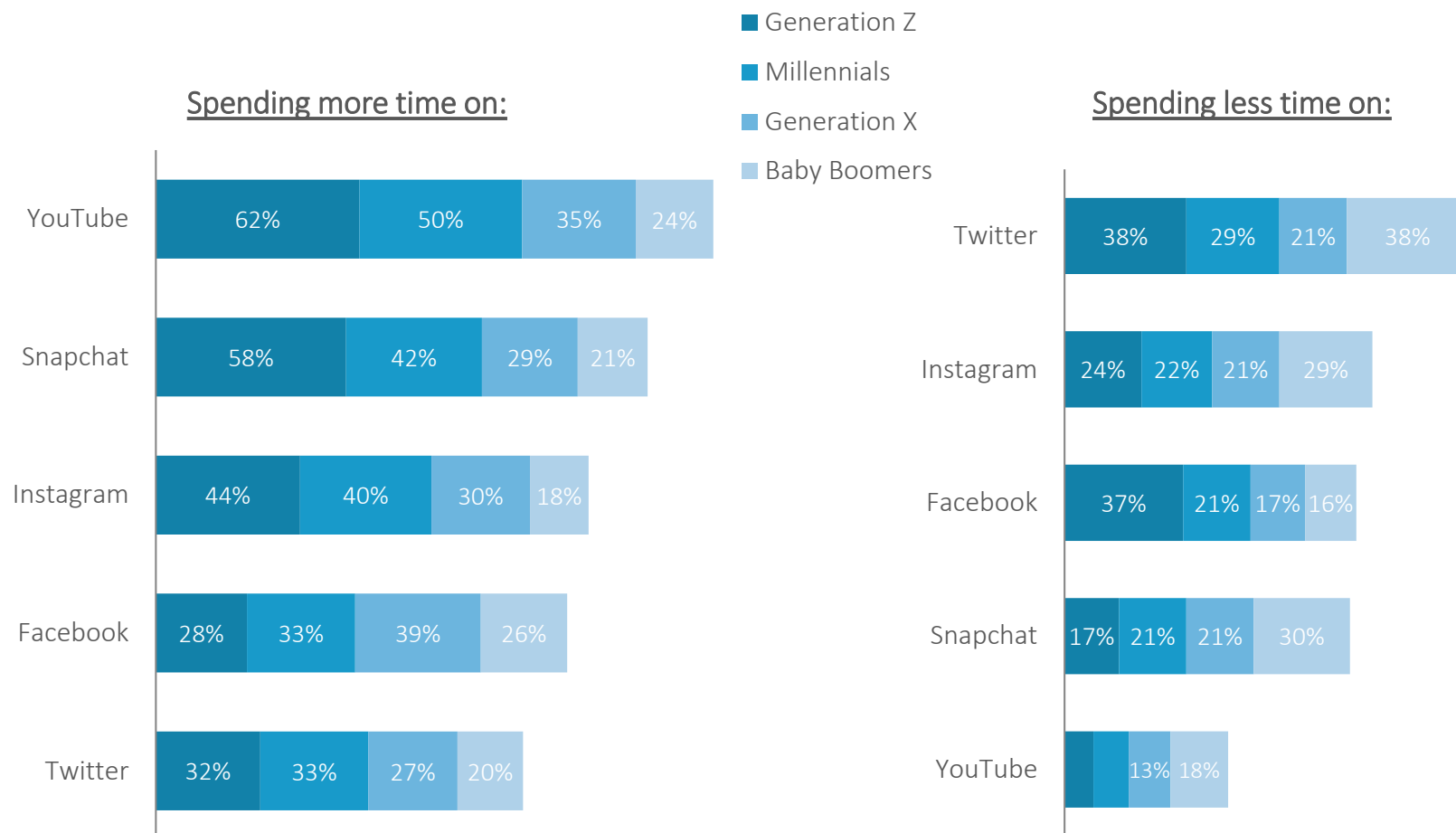


	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
[Bottom-Two Box]	23	24	↓ 11	↓ 18	↑ 39
Never	9	9	↓ 2	↓ 5	↑ 21
Rarely	14	15	↓ 10	13	↑ 18
Occasionally	24	↓ 20	21	↑ 28	26
Often	26	27	29	29	↓ 22
Very often	27	29	↑ 39	25	↓ 14
[Top-Two Box]	53	56	↑ 68	54	↓ 36
Base	N=2117	n=500	n=566	n=540	n=511

Sample Size: 2,117 (51% of Respondents) - How often do you view or post on social media (such as Facebook, Instagram, Twitter, or Snapchat)?



Top-five sites: spending more or less time



If you visit this site/app, are you spending more time, less time, or about the same amount of time with it vs. one year ago?

Time spent on YouTube



	GENERATION				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Less time	12	↓ 9	11	13	↑ 18
About the same amount	44	↓ 28	↓ 39	↑ 53	↑ 58
More time	44	↑ 62	↑ 50	↓ 35	↓ 24
Base	N=1864	n=479	n=535	n=480	n=370

Sample Size: 1,864 (45% of Respondents)

Time spent on Snapchat



	Generation				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Less time	20	17	21	21	↑ 30
About the same amount	36	↓ 24	38	↑ 49	↑ 49
More time	43	↑ 58	42	↓ 29	↓ 21
Base	N=1049	n=367	n=384	n=228	n=70

Sample Size: 1,049 (25% of Respondents)

Time spent on Instagram



	GENERATION				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Less time	23	24	22	21	29
About the same amount	40	↓ 32	37	↑ 49	↑ 53
More time	37	↑ 44	40	↓ 30	↓ 18
Base	N=1287	n=387	n=454	n=318	n=128

Sample Size: 1,287 (31% of Respondents)

Time spent on Facebook



	GENERATION				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Less time	22	↑ 37	21	↓ 17	↓ 16
About the same amount	46	↓ 35	46	44	↑ 57
More time	32	28	33	↑ 39	↓ 26
Base	N=1790	n=344	n=518	n=509	n=419

Sample Size: 1,790 (43% of Respondents)

Time spent on Twitter



	GENERATION				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Less time	31	↑ 38	29	↓ 21	↑ 38
About the same amount	40	↓ 30	37	↑ 51	42
More time	29	32	↑ 33	27	↓ 20
Base	N=1089	n=253	n=353	n=304	n=179

Sample Size: 1,089 (26% of Respondents)

Time spent on House Party



	GENERATION				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Less time	31	↑ 41	25	25	45
About the same amount	45	↓ 31	51	50	41
More time	25	28	24	25	14
Base	N=353	n=94	n=129	n=108	n=22

Sample Size: 353 (9% of Respondents)

Time spent on Tumblr



	GENERATION				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Less time	36	41	33	↓ 29	↑ 50
About the same amount	39	↓ 29	39	↑ 49	48
More time	25	30	28	23	↓ 2
Base	N=610	n=182	n=234	n=150	n=44

Sample Size: 610 (15% of Respondents)

Time spent on Pinterest



	GENERATION				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Less time	33	37	33	↓ 27	38
About the same amount	44	↓ 35	42	↑ 52	47
More time	23	↑ 28	25	20	↓ 15
Base	N=1037	n=224	n=339	n=288	n=186

Sample Size: 1,037 (25% of Respondents)

Time spent on Kik



	GENERATION				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Less time	42	↑ 50	41	↓ 26	53
About the same amount	37	↓ 27	38	↑ 51	37
More time	21	23	21	23	10
Base	N=589	n=230	n=203	n=126	n=30

Sample Size: 589 (14% of Respondents)

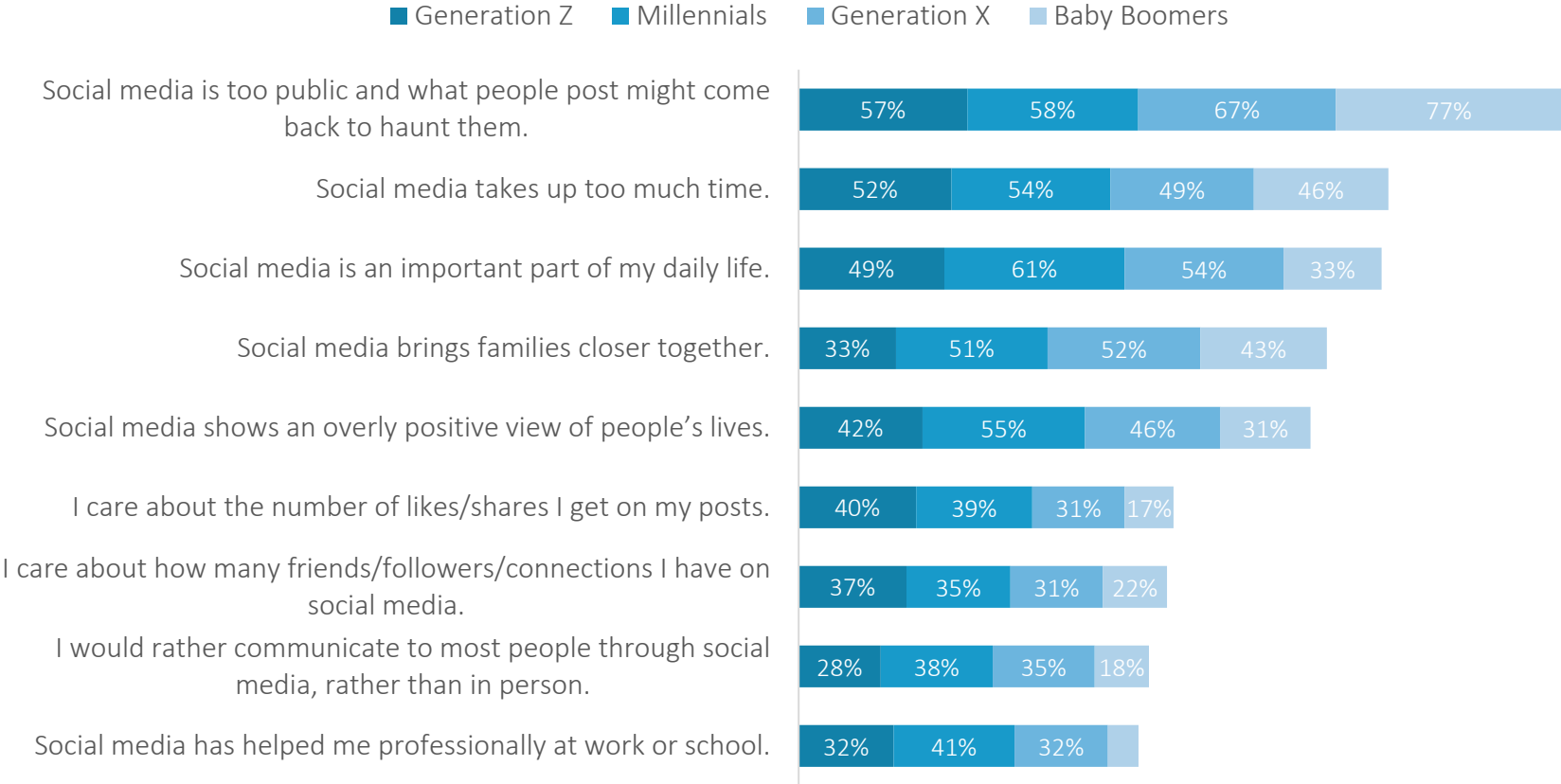
Time spent on Linked In



	GENERATION				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Less time	36	↑ 47	↓ 30	↓ 30	↑ 46
About the same amount	47	↓ 32	51	49	45
More time	17	21	18	21	↓ 9
Base	N=715	n=78	n=239	n=230	n=168

Sample Size: 715 (17% of Respondents)

Social media attitudes



Two thirds of respondents agree that social media is too public and the information posted online could come back to haunt them (65%), with half stating that social media takes up too much time. About one third of respondents prefer to communicate with most people through social media rather than in person.

Sample Size: 2,117 (51% of Respondents) - How much do you agree or disagree with the following statements?

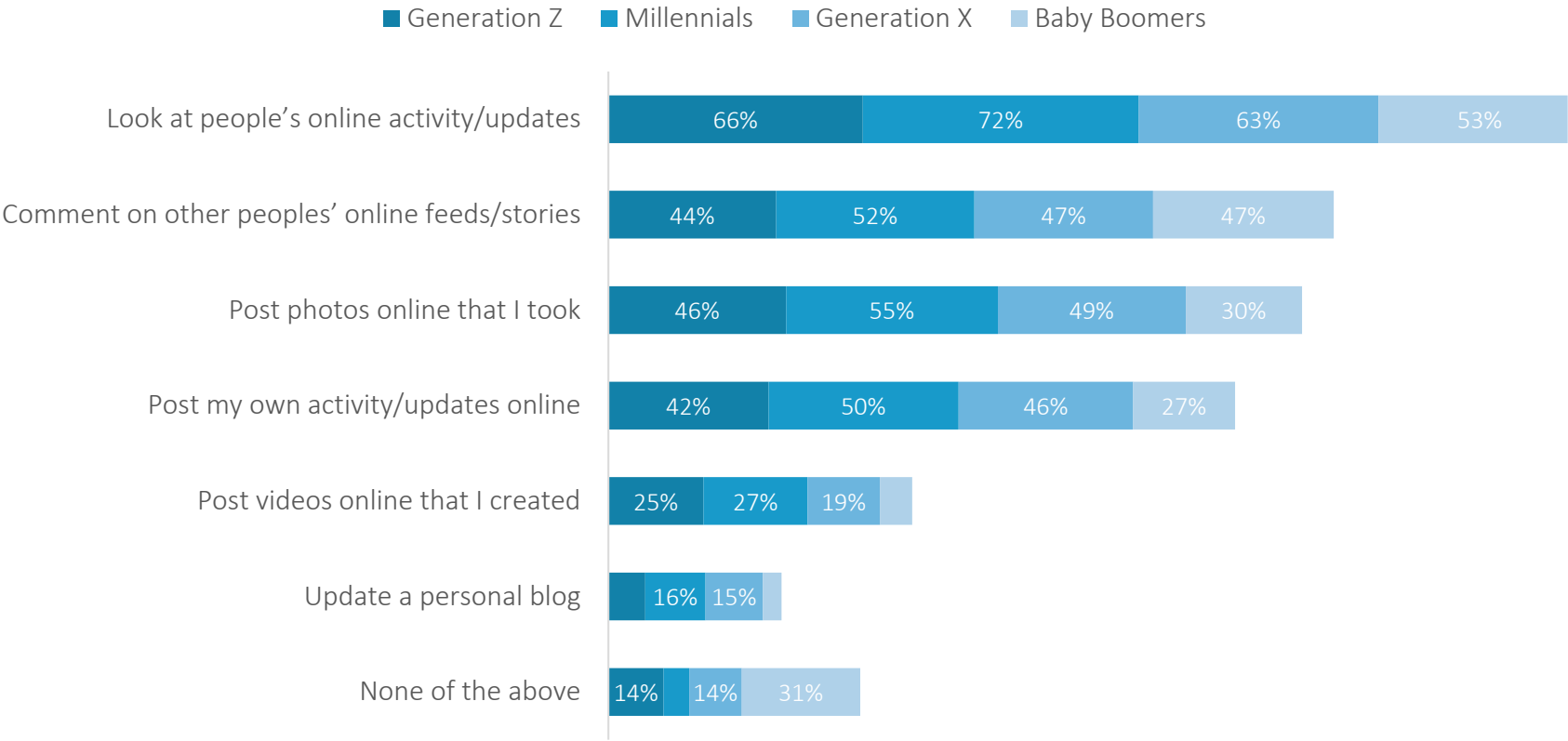
Social media attitudes



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
Social media is too public and what people post might come back to haunt them.	66	↓ 57	↓ 58	67	↑ 77
Social media is an important part of my daily life.	50	49	↑ 61	↑ 54	↓ 33
Social media takes up too much time.	50	52	↑ 54	49	↓ 46
Social media brings families closer together.	47	↓ 33	↑ 51	↑ 52	43
Social media shows an overly positive view of people's lives.	44	42	↑ 55	46	↓ 31
I care about the number of likes/shares I get on my posts.	31	↑ 40	↑ 39	31	↓ 17
I would rather communicate to most people through social media, rather than in person.	30	28	↑ 38	↑ 35	↓ 18
I care about how many friends/followers/connections I have on social media.	30	↑ 37	↑ 35	31	↓ 22
Social media has helped me professionally at work or school.	28	32	↑ 41	32	↓ 10

Sample Size: 2,117 (51% of Respondents) - How much do you agree or disagree with the following statements?

Social media habits



The most common activities on social media include looking at others' online activity/updates (63%) and commenting on others' stories/feeds (48%). Millennials are more likely to report regularly participating in each different activity option.

Sample Size: 2,117 (51% of Respondents) - Which of the following do you regularly do?

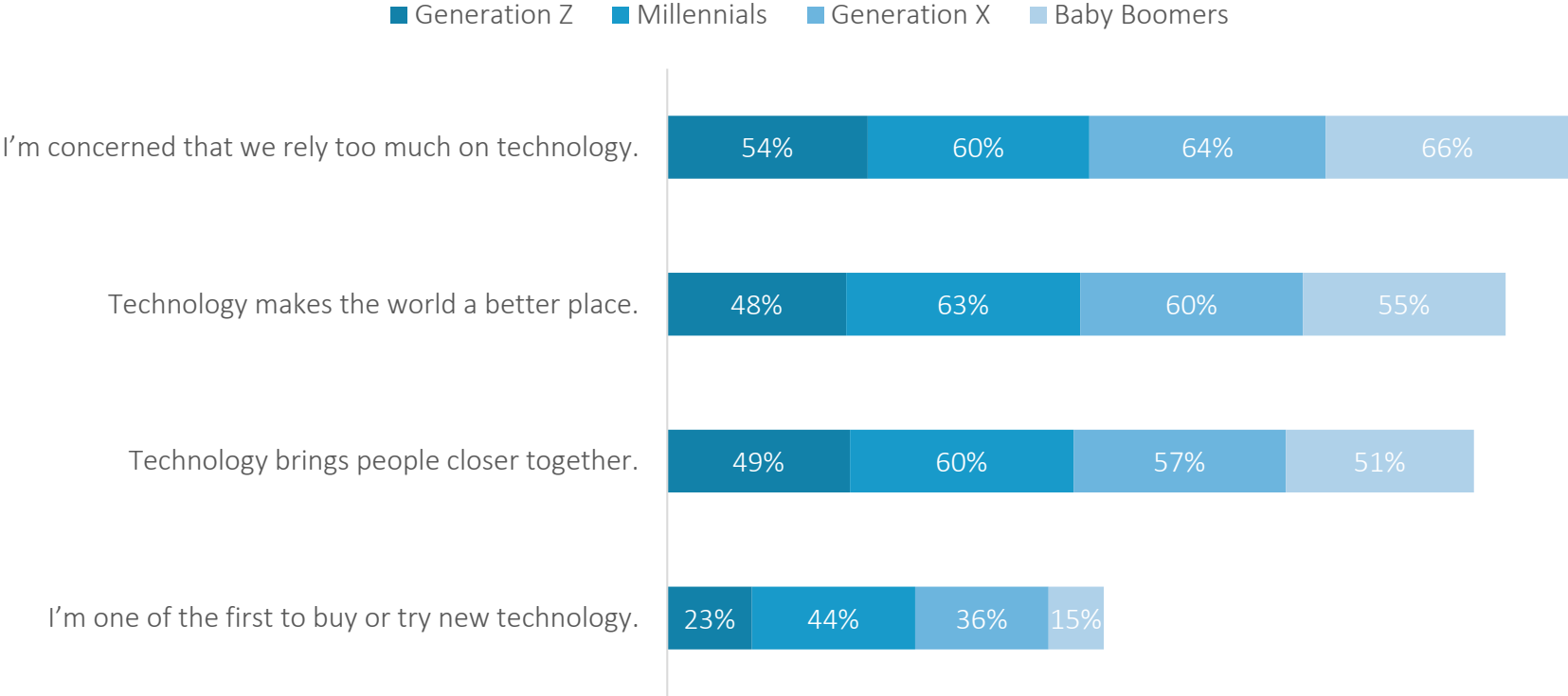
Social media habits



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Look at people’s online activity/updates	63	66	72	63	53
Comment on other peoples’ online feeds/stories	48	44	52	47	47
Post photos online that I took	45	46	55	49	30
Post my own activity/updates online	41	42	50	46	27
Post videos online that I created	19	25	27	19	8
None of the above	17	14	7	14	31
Update a personal blog	12	10	16	15	5
Update a personal vlog	4	4	6	6	1
Base	N=2117	n=500	n=566	n=540	n=511

Sample Size: 2,117 (51% of Respondents) - Which of the following do you regularly do?

Technology attitudes



Six out of 10 respondents (60%) are concerned that they rely too much on technology, with nearly as many agreeing that technology makes the world a better place (57%).

Sample Size: 2,117 (51% of Respondents) - How much do you agree or disagree with the following statements?

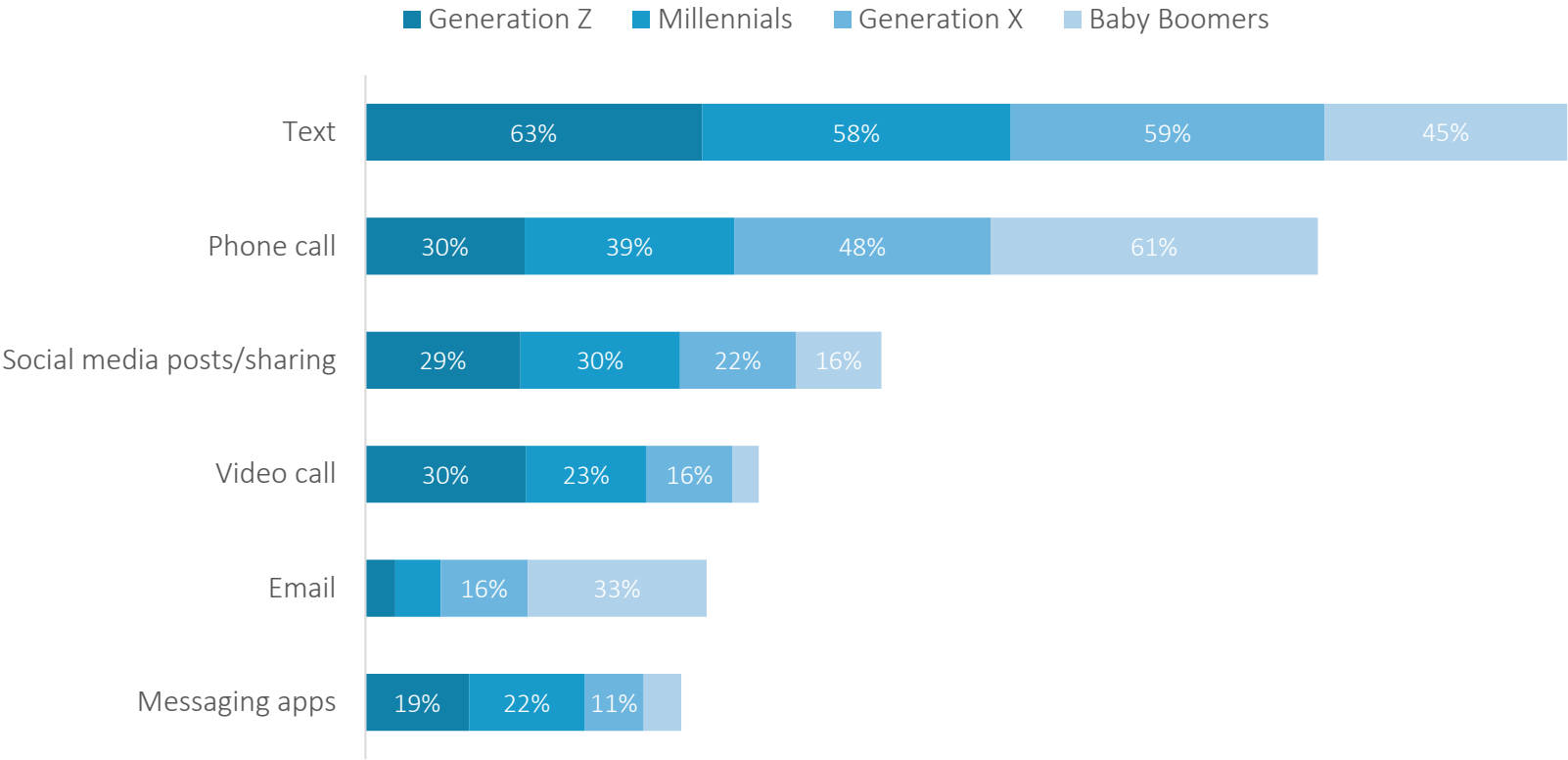
Technology attitudes



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
I'm concerned that we rely too much on technology.	62	↓ 54	60	64	↑ 66
Technology makes the world a better place.	58	↓ 48	↑ 63	60	55
Technology brings people closer together.	55	↓ 49	↑ 60	57	↓ 51
I'm one of the first to buy or try new technology.	31	↓ 23	↑ 44	↑ 36	↓ 15

Sample Size: 2,117 (51% of Respondents) - How much do you agree or disagree with the following statements?

Favorite ways to keep in touch with friends



When not with friends, respondents' favorite ways to stay in touch are by text (55%) and phone call (47%). Only a few say they enjoy sending a card or letter to keep in touch (6%). Gen Z is the generation most likely to rely on texts: 63% vs. 45% of Boomers.

Sample Size: 2,117 (51% of Respondents) - When you're not together, what are your favorite ways to stay in touch with your close friends?

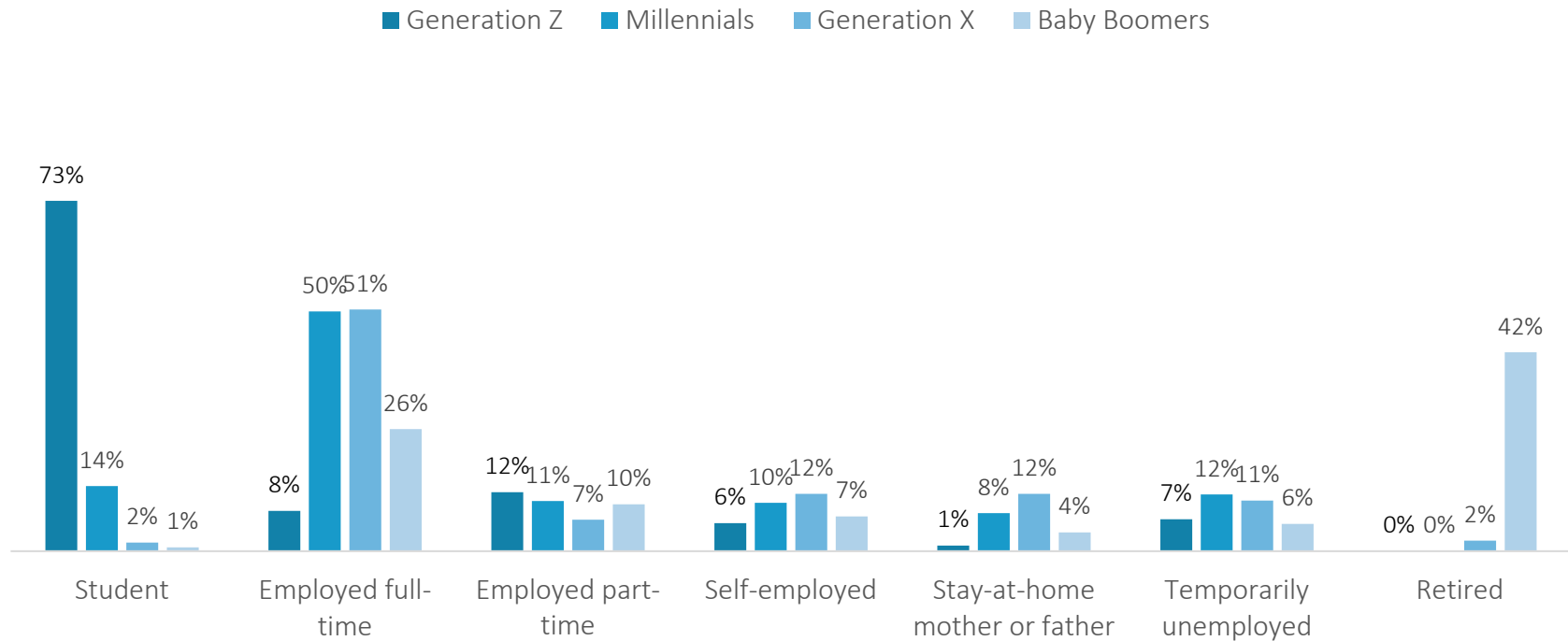
Favorite ways to keep in touch with friends



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Text	55	63	58	59	45
Phone call	47	30	39	48	61
Social media posts/sharing	23	29	30	22	16
Email	18	6	8	16	33
Video call	17	30	23	16	5
Messaging apps	14	19	22	11	7
Sending a card or letter	6	3	6	6	8
Base	N=2117	n=500	n=566	n=540	n=511

Sample Size: 2,117 (51% of Respondents) - When you're not together, what are your favorite ways to stay in touch with your close friends?

Current employment status



Most Gen Z respondents are students (73%), while Millennials and Gen Xers are most frequently employed full-time (50% and 51%, respectively). The largest category for Baby Boomers is retired (42%)

Sample Size: 2,033 (49% of Respondents) - What best describes your current employment status?

Current employment status



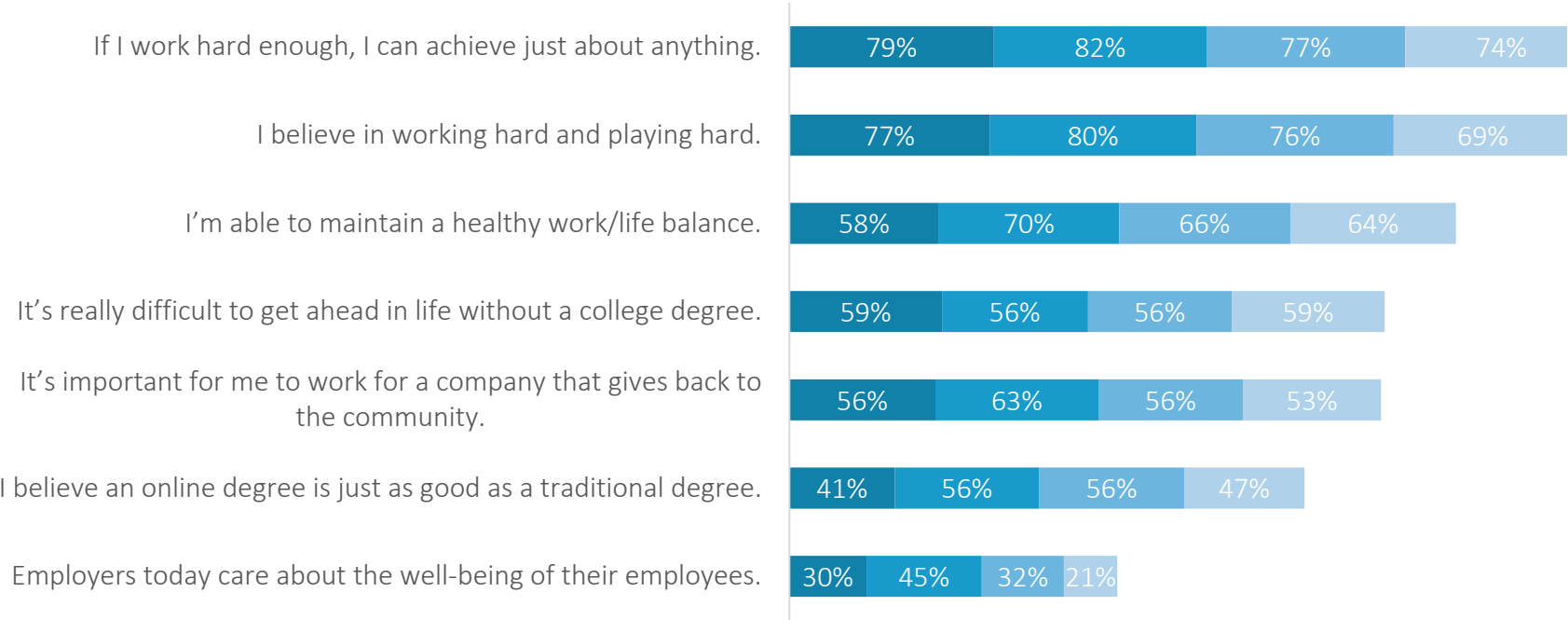
	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Employed full-time	38	8	50	51	26
Student	14	73	14	2	1
Retired	13	0	0	2	42
Self-employed	9	6	10	12	7
Employed part-time	9	12	11	7	10
Temporarily unemployed	9	7	12	11	6
Stay-at-home mother or father	7	1	8	12	4
Other	4	2	2	6	7
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - What best describes your current employment status?

Attitudes about work and school



■ Generation Z ■ Millennials ■ Generation X ■ Baby Boomers



Most respondents (78%) believe if they work hard enough, they can achieve just about anything – as well as believe in a "work hard, play hard" sensibility (76%). However, only a third (32%) believe that today's employers care about the well-being of employees.

Sample Size: 2,033 (49% of Respondents) - How much do you agree or disagree with the following statements?

Attitudes about work and school



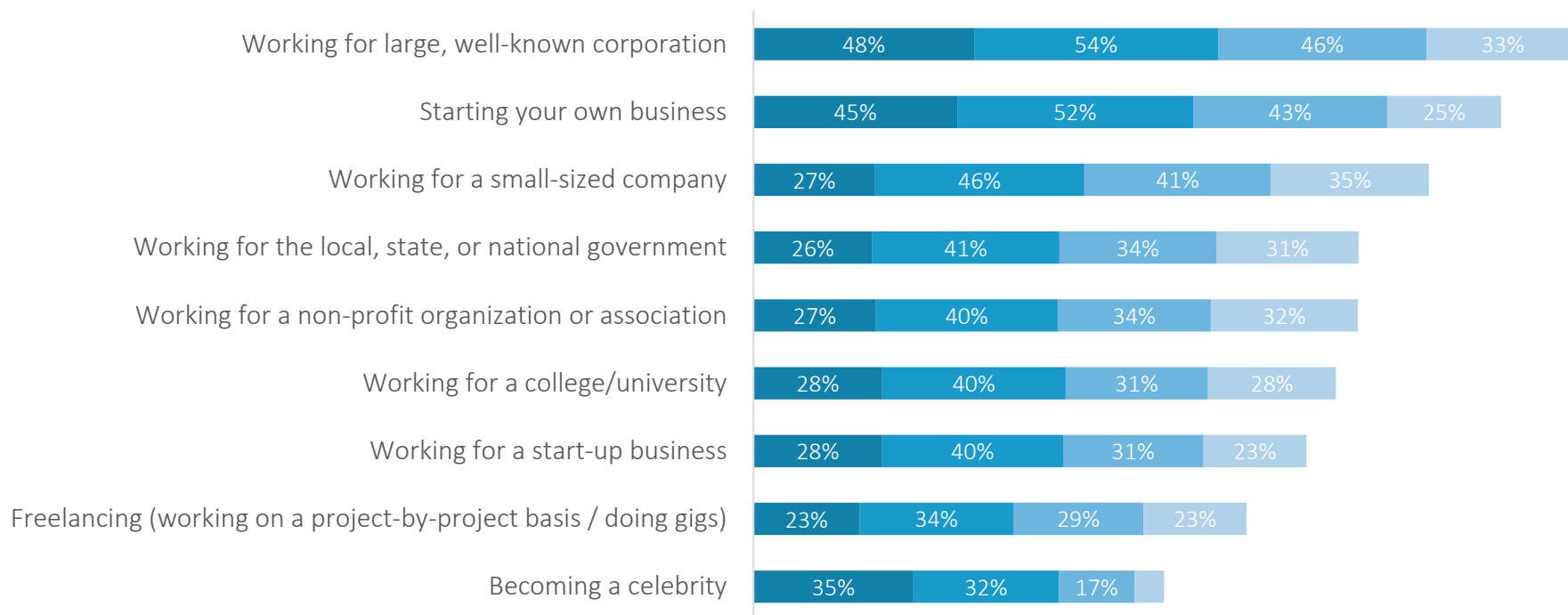
	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
If I work hard enough, I can achieve just about anything.	78	79	↑ 82	77	↓ 74
I believe in working hard and playing hard.	76	77	↑ 80	76	↓ 69
I’m able to maintain a healthy work/life balance.	66	↓ 58	↑ 70	66	64
It’s really difficult to get ahead in life without a college degree.	57	59	56	56	59
It’s important for me to work for a company that gives back to the community.	57	56	↑ 63	56	↓ 53
I believe an online degree is just as good as a traditional degree.	51	↓ 41	↑ 56	↑ 56	47
Employers today care about the well-being of their employees.	32	30	↑ 45	32	↓ 21

Sample Size: 2,033 (49% of Respondents) - How much do you agree or disagree with the following statements?

Employment interests



■ Generation Z ■ Millennials ■ Generation X ■ Baby Boomers



Respondents are most interested in working for large, well-known corporations (45%) and starting their own businesses (41%). Millennials are more interested than any other generation in almost every employer option, including the entrepreneurial choices of a start-up (40%) and simply freelancing (34%).

Sample Size: 2,033 (49% of Respondents) - How personally interested are you in each of the following?

Employment interests



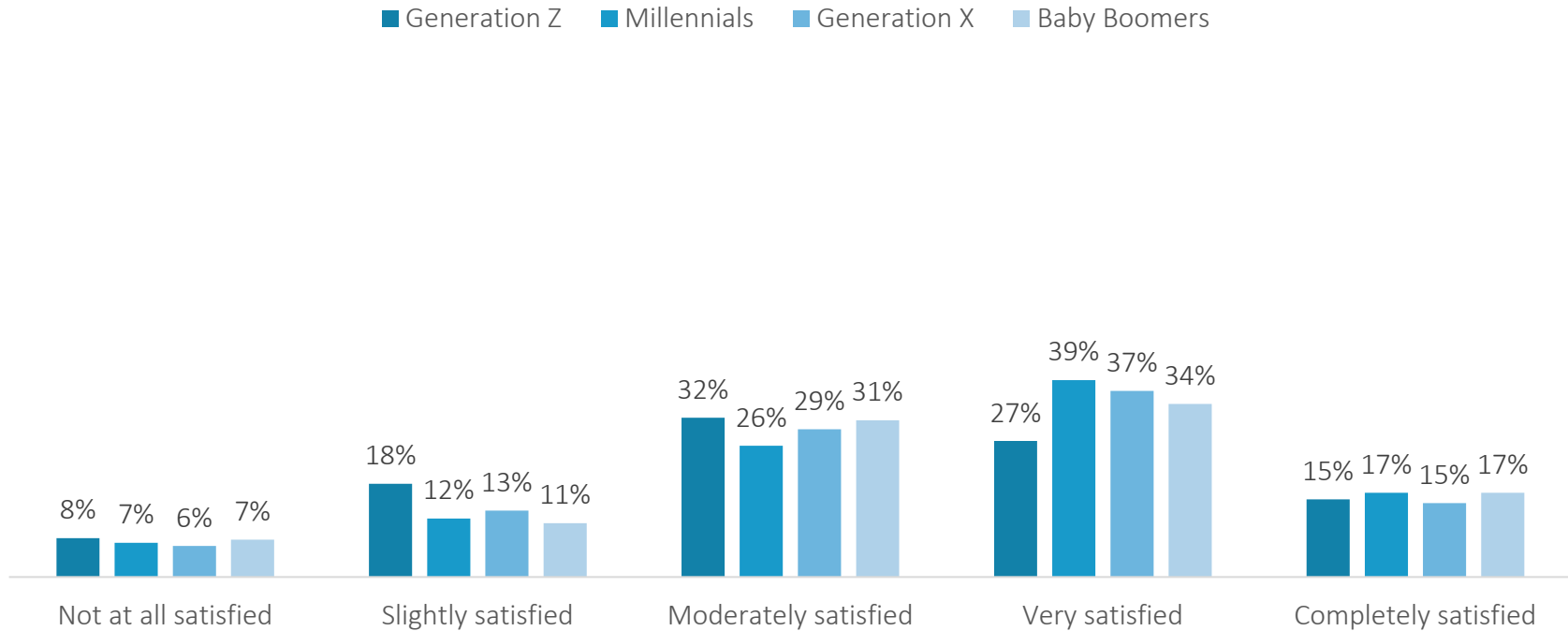
GENERATION

	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
Working for large, well-known corporation	45	48	↑ 54	46	↓ 33
Starting your own business	41	45	↑ 52	43	↓ 25
Working for a small-sized company	39	↓ 27	↑ 46	↑ 41	35
Working for the local, state, or national government	35	↓ 26	↑ 41	34	31
Working for a non-profit organization or association	34	↓ 27	↑ 40	34	32
Working for a college/university	33	↓ 28	↑ 40	31	↓ 28
Working for a start-up business	31	28	↑ 40	31	↓ 23
Being a freelancer (working on a project-by-project basis or doing gigs)	28	↓ 23	↑ 34	29	↓ 23
Becoming a celebrity	21	↑ 35	↑ 32	↓ 17	↓ 6
Joining the military	14	↑ 17	↑ 19	12	↓ 8

Sample Size: 2,033 (49% of Respondents) - How personally interested are you in each of the following?



Job satisfaction



Job satisfaction abounds. Most employed respondents are very satisfied (36%) with their current job, followed by moderately satisfied (29%). Given the short-term nature of their jobs, Gen Z is the least satisfied.

Sample Size: 1,042 (25% of Respondents) - Overall, how satisfied are you with your current job?

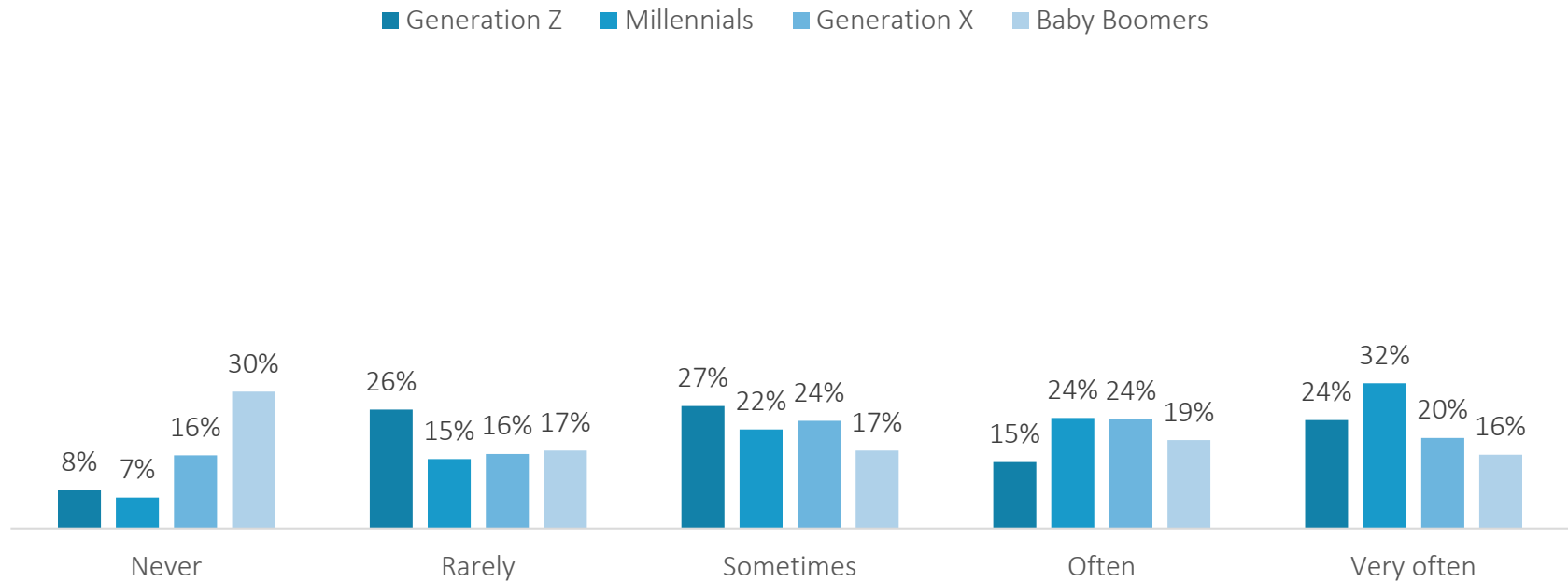
Job satisfaction



	GENERATION				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
[Bottom-Two Box]	20	↑ 26	18	19	18
Not at all satisfied	7	8	7	6	7
Slightly satisfied	13	↑ 18	12	13	11
Moderately satisfied	29	32	26	29	31
Very satisfied	36	↓ 27	39	37	34
Completely satisfied	16	15	17	15	17
[Top-Two Box]	52	↓ 42	56	51	51
Base	N=1042	n=130	n=354	n=342	n=216

Sample Size: 1,042 (25% of Respondents) - Overall, how satisfied are you with your current job?

Social media use at work



Highest among Boomers (30%), only a small percentage of employees Gen X and younger, (10%) completely avoid their personal social media accounts at work. Nearly half of all generations check it often (46%), particularly Millennials (56%).

Sample Size: 1,042 (25% of Respondents) - How often do you check your personal social media (like Facebook and Instagram) when you're at work?

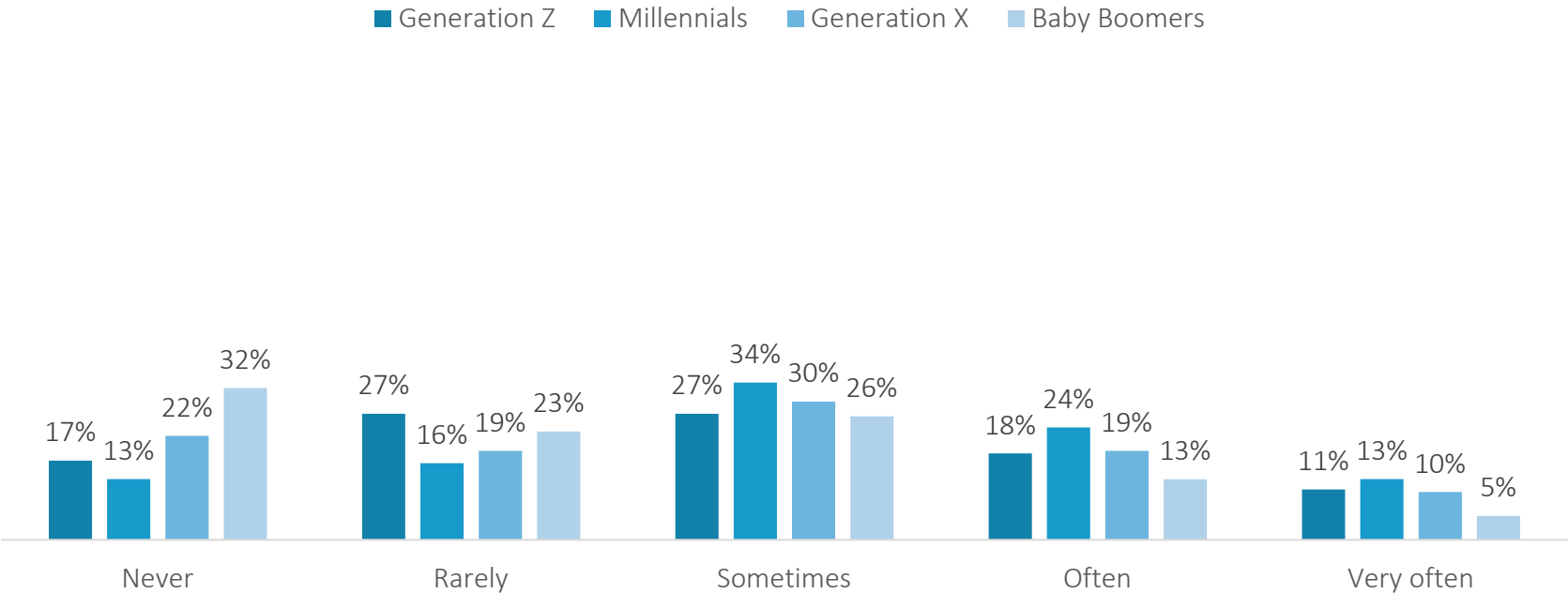
Social media use at work



	GENERATION				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
[Top-Two Box]	32	35	↓ 22	32	↑ 47
Never	15	↓ 8	↓ 7	16	↑ 30
Rarely	17	↑ 26	15	16	17
Sometimes	22	27	22	24	↓ 17
Often	22	↓ 15	24	24	19
Very often	24	24	↑ 32	↓ 20	↓ 16
[Top-Two Box]	46	38	↑ 56	44	↓ 36
Base	N=1042	n=130	n=354	n=342	n=216

Sample Size: 1,042 (25% of Respondents) - How often do you check your personal social media (like Facebook and Instagram) when you're at work?

Catching up on work after hours



For 29% of respondents, working outside of their “regular working hours” is a common occurrence, especially among Millennials, with 37% reporting they do so often. A third (32%) of Boomers report never catching up on work after hours.

Sample Size: 1,042 (25% of Respondents) - How often do you catch up on work for your job outside of your regular working hours?

Catching up on work after hours

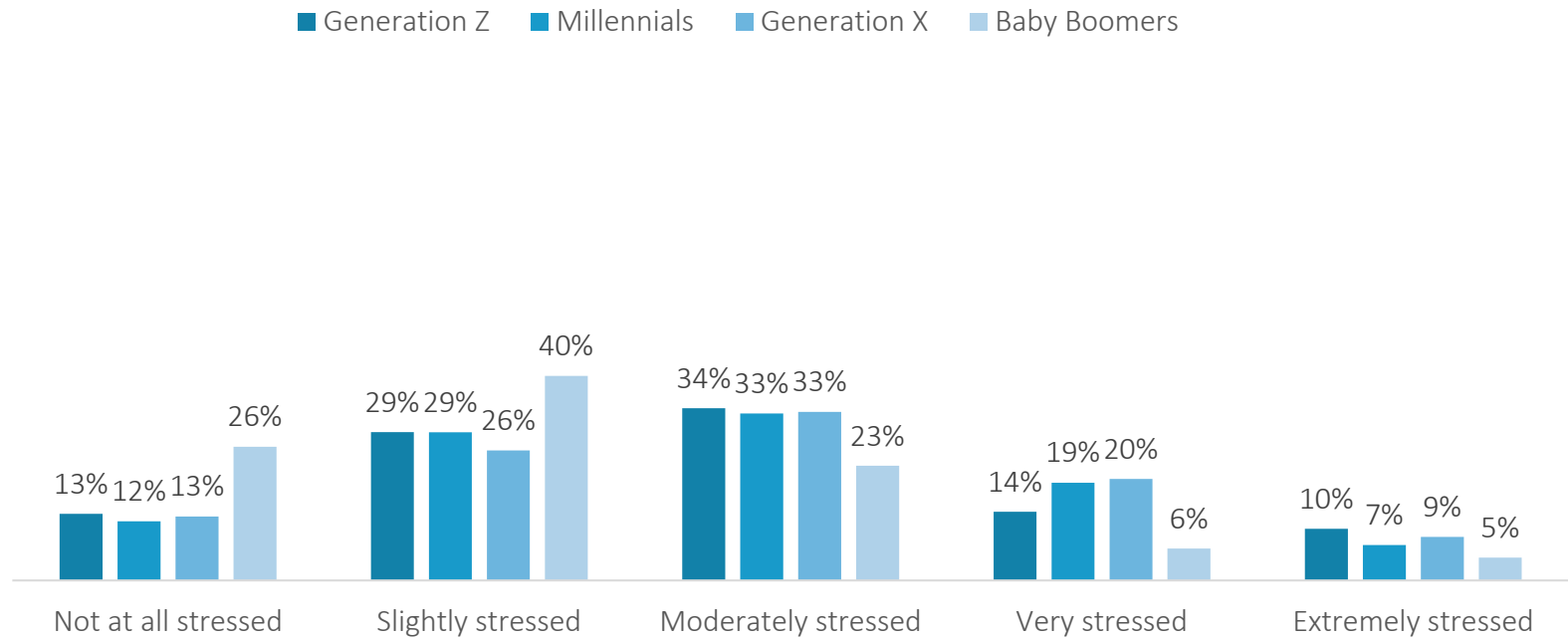


	GENERATION				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
[Bottom-Two Box]	40	44	↓ 29	41	↑ 56
Never	21	17	↓ 13	22	↑ 32
Rarely	20	↑ 27	↓ 16	19	23
Sometimes	30	27	34	30	26
Often	19	18	↑ 24	19	↓ 13
Very often	10	11	↑ 13	10	↓ 5
[Top-Two Box]	30	29	↑ 37	29	↓ 18
Base	N=1042	n=130	n=354	n=342	n=216

Sample Size: 1,042 (25% of Respondents) - How often do you catch up on work for your job outside of your regular working hours?



Amount of stress



Gen X and Millennials, the bulk of the workforce, report the highest levels of stress (29% and 26% very or extremely stressed, respectively), while Gen Z claims significantly more extreme stress (10%). Boomers, however, have reached a less stressful point in their lives, with 67% having only slight or no stress.

Sample Size: 2,033 (49% of Respondents) - How stressed are you right now at this stage in your life?

Amount of stress



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
[Bottom-Two Box]	48	↓ 42	↓ 41	↓ 38	↑ 67
Not at all stressed	16	↓ 13	↓ 12	↓ 13	↑ 26
Slightly stressed	32	29	29	↓ 26	↑ 40
Moderately stressed	30	34	33	33	↓ 23
Very stressed	15	14	↑ 19	↑ 20	↓ 6
Extremely stressed	7	↑ 10	7	9	↓ 5
[Top-Two Box]	22	24	↑ 26	↑ 29	↓ 11
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - How stressed are you right now at this stage in your life?

Biggest concerns/worries



GENERATION

	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Money	70%	72%	73%	73%	60%
The future	56%	71%	62%	46%	44%
Health issues	41%	35%	34%	41%	57%
The current President	41%	48%	41%	33%	43%
Our country's economy	41%	36%	40%	40%	47%
The threat of terrorism	39%	39%	32%	36%	50%
Your weight or physical appearance	37%	47%	37%	34%	31%
The threat of war with another country	37%	43%	33%	30%	41%
Health of a loved one	35%	41%	31%	29%	38%
Your safety	35%	45%	37%	29%	28%
Work	32%	36%	45%	31%	15%
Relationship issues	31%	48%	37%	23%	15%
Depression/anxiety	29%	40%	31%	26%	17%
Loneliness	28%	44%	30%	21%	18%
Retirement	25%	11%	18%	37%	35%
Your mother	22%	35%	21%	19%	14%
Friendship issues	21%	46%	22%	10%	6%

Sample Size: 2,033 (49% of Respondents) What keeps you up at night? Worrying about...? Select all that apply.

Biggest concerns/worries (cont'd.)



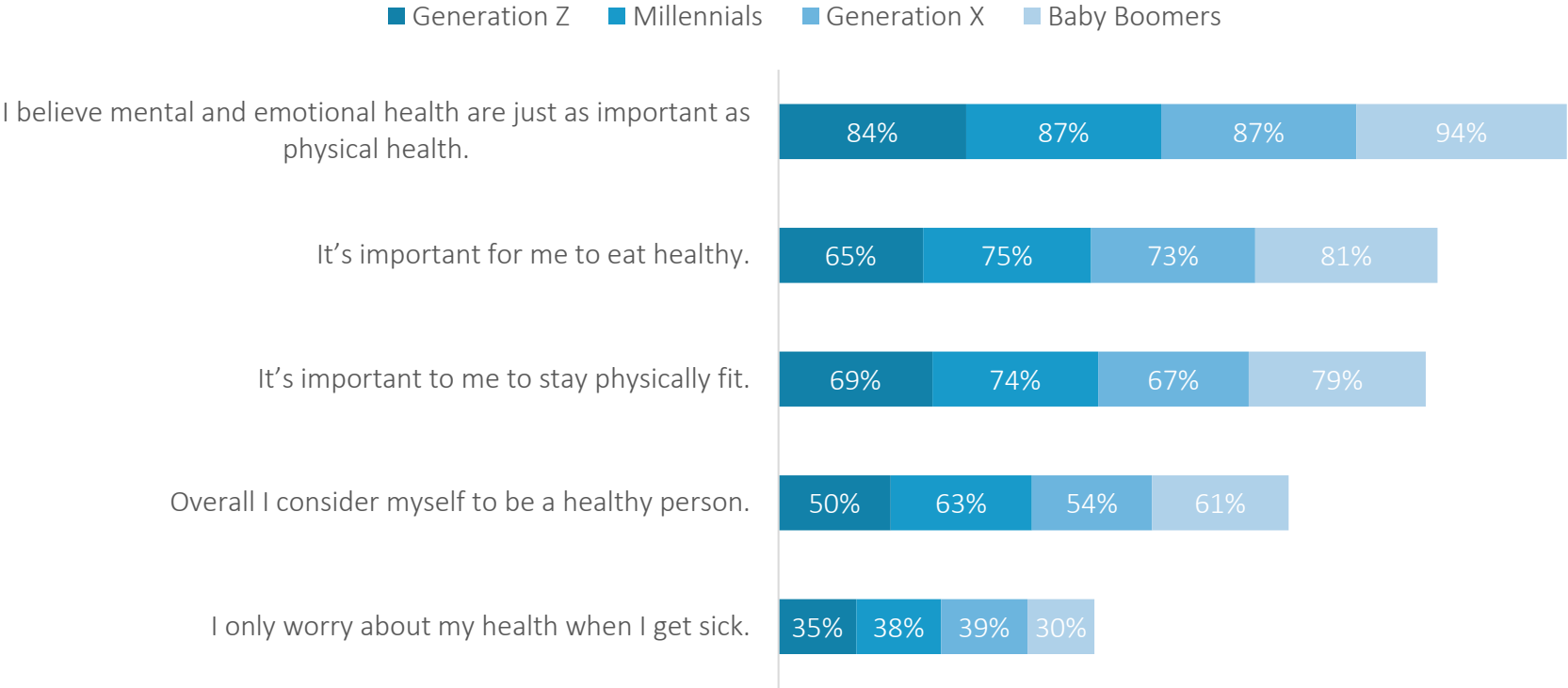
GENERATION

	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Lack of free time	18%	30%	21%	16%	6%
Challenges faced in other countries	17%	23%	18%	12%	15%
Your spouse/partner or significant other	17%	14%	17%	18%	18%
Your father	17%	30%	17%	13%	5%
School	17%	58%	8%	0%	0%
Being emotionally or physically abused	10%	20%	11%	6%	4%
Substance abuse or an addiction	6%	9%	7%	5%	5%
Your kids	4%	0%	6%	6%	2%
Base	N=2033	n=510	n=514	n=500	n=509

Money is the highest concern for all generations (70% in total), with worries about the future coming in next for all but Boomers – who report higher concern for their health.

Sample Size: 2,033 (49% of Respondents) - What keeps you up at night? Worrying about...? Select all that apply.

Attitudes about health



Mental and emotional health are just as important as physical health for most respondents (88%), with 74% stating it is important for them to eat healthy. Gen Z isn't too worried about their health quite yet, skewing lower on these attitudes overall.

Sample Size: 2,033 (49% of Respondents) - How much do you agree or disagree with the following statements?

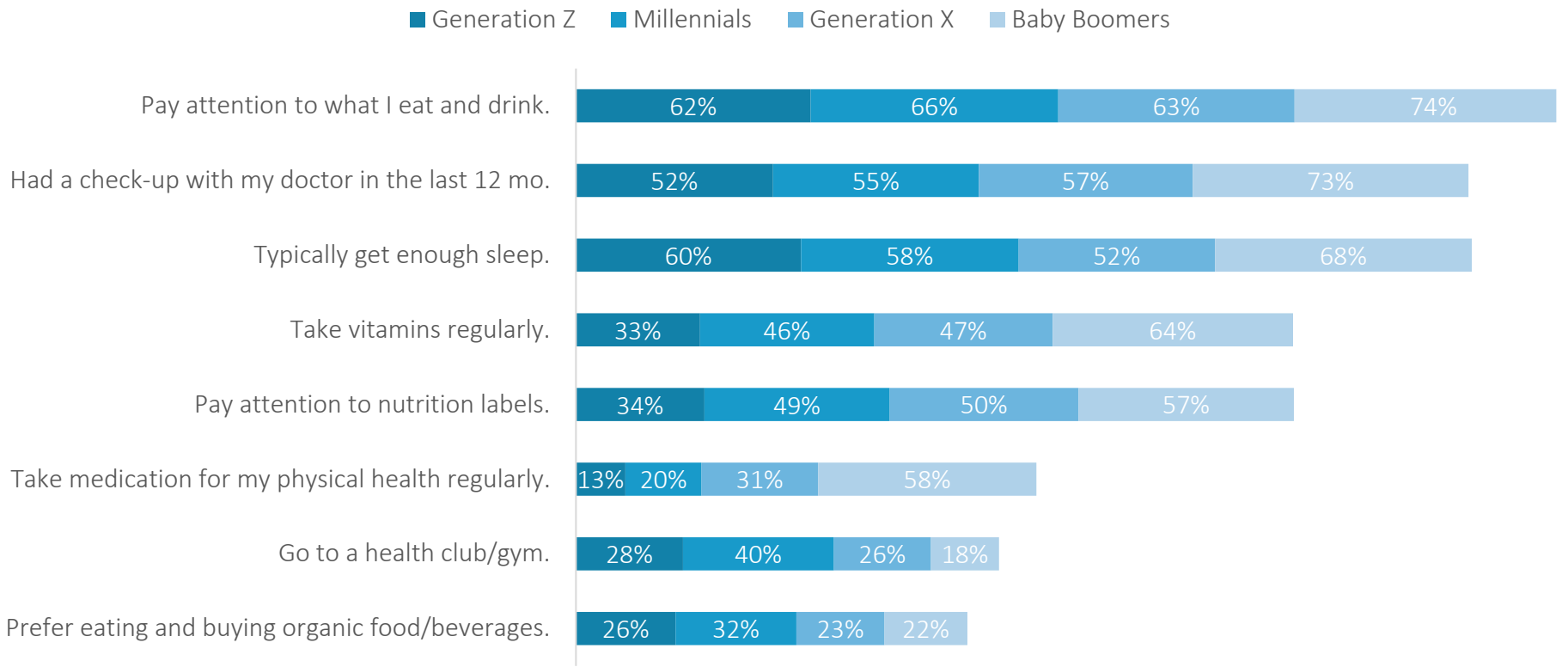
Attitudes about health



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
I believe mental and emotional health are just as important as physical health.	89	↓ 84	87	87	↑ 94
It's important to me to stay physically fit.	73	↓ 69	74	↓ 67	↑ 79
It's important for me to eat healthy.	75	↓ 65	75	73	↑ 81
Overall I consider myself to be a healthy person.	58	↓ 50	↑ 63	54	↑ 61
I only worry about my health when I get sick.	35	35	38	39	↓ 30

Sample Size: 2,033 (49% of Respondents) - How much do you agree or disagree with the following statements?

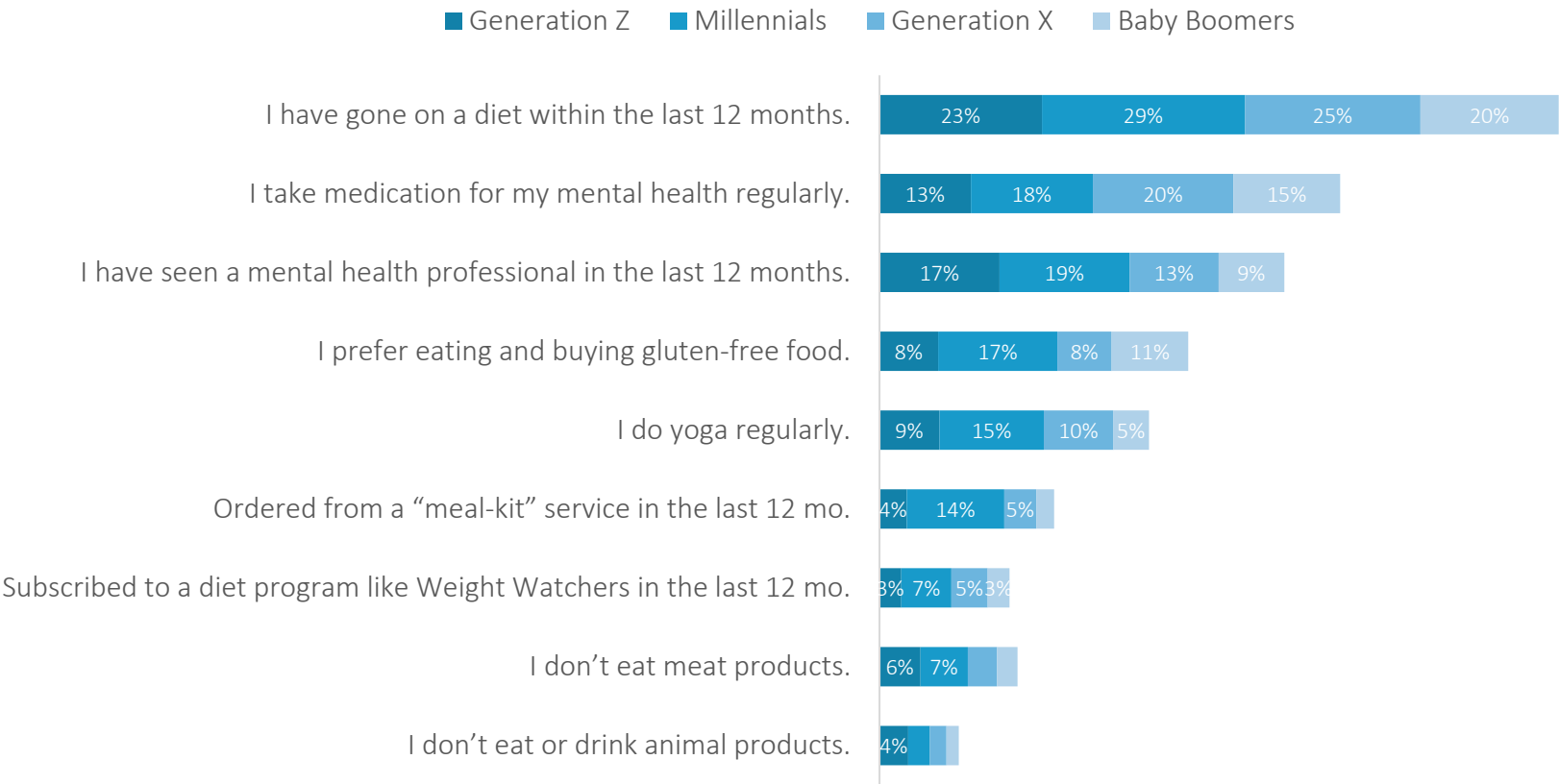
Wellness and nutrition habits



Most respondents pay attention to what they eat and drink (67%), and about half note nutrition labels (50%). Boomers report getting the most sleep, with Gen X reporting the least. More Millennials go to the gym and prefer organic fare.

Sample Size: 2,033 (49% of Respondents) - Which of the following are true for you?

Wellness and nutrition habits (cont'd.)



Sample Size: 2,033 (49% of Respondents) - Which of the following are true for you?

Wellness and nutrition habits



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
I pay attention to what I eat and drink.	67	62	66	63	74
I have had a routine check-up with my doctor in the last 12 months.	61	52	55	57	73
I typically get enough sleep.	60	60	58	52	68
I take vitamins regularly.	50	33	46	47	64
I pay attention to nutrition labels.	50	34	49	50	57
I take medication for my physical health regularly.	34	13	20	31	58
I go to a health club/gym.	28	28	40	26	18
I prefer eating and buying organic food/beverages.	26	26	32	23	22
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Which of the following are true for you?

Wellness and nutrition habits *(cont'd.)*

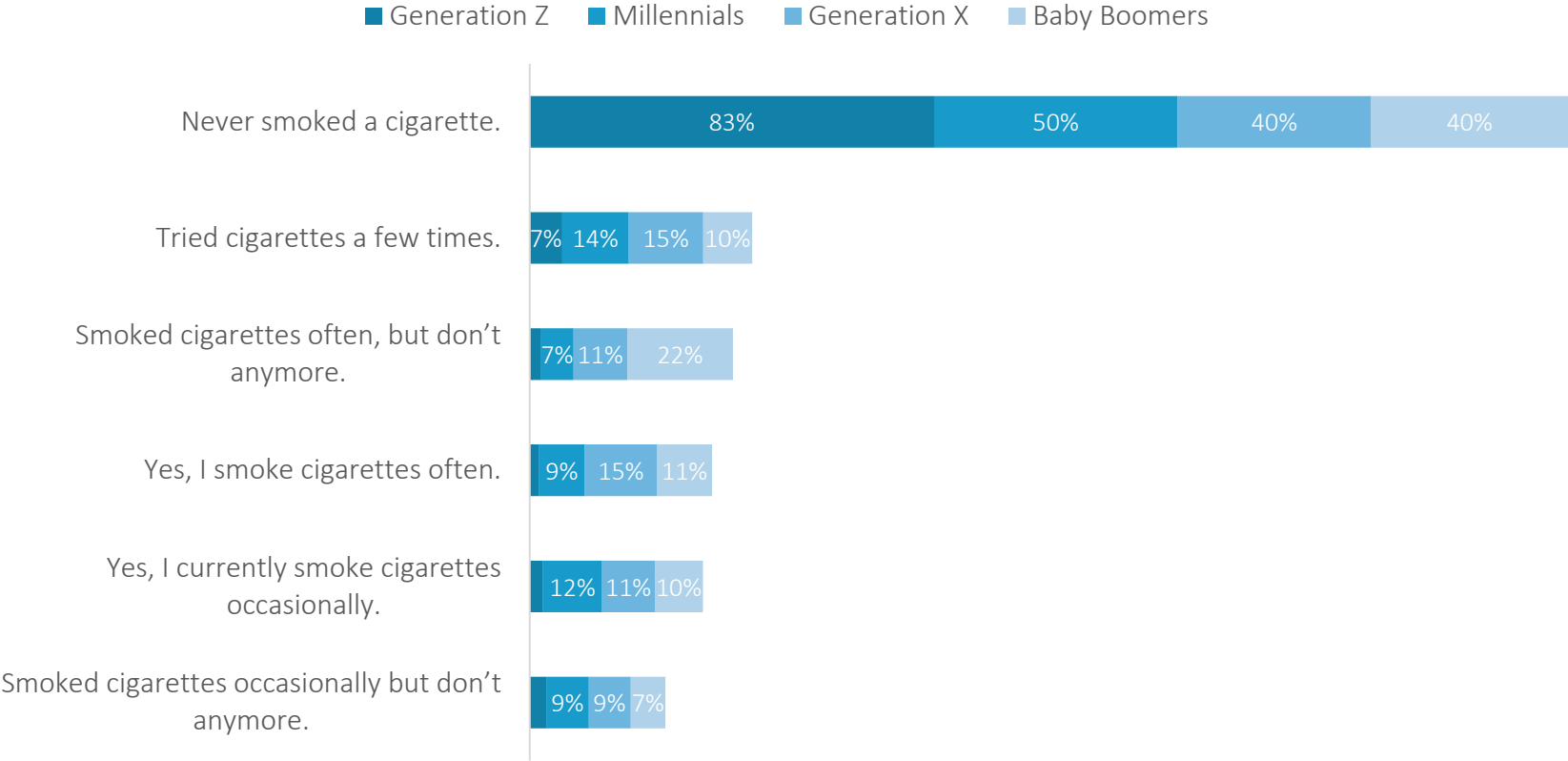


GENERATION

	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Gone on a diet within the last 12 months.	25	23	29	25	20
Take medication for my mental health regularly.	17	13	18	20	15
Seen a mental health professional in the last 12 months.	14	17	19	13	9
Prefer eating and buying gluten-free food.	12	8	17	8	11
Do yoga regularly.	10	9	15	10	5
Ordered from a “meal-kit” service in the last 12 mo.	7	4	14	5	3
Subscribed to a diet program like Weight Watchers in the last 12 mo.	5	3	7	5	3
Don’t eat meat products.	5	6	7	4	3
Don’t eat or drink animal products.	3	4	3	2	2
Gone on a diet within the last 12 months.	25	23	29	25	20
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Which of the following are true for you?

Smoking habits



The vast majority of Gen Z (83%) have never smoked a cigarette, while fewer than half of the other generations can make that claim. Still, only around 1/5 of those above Gen Z say they still smoke to some degree.

Sample Size: 2,033 (49% of Respondents) - Have you...?

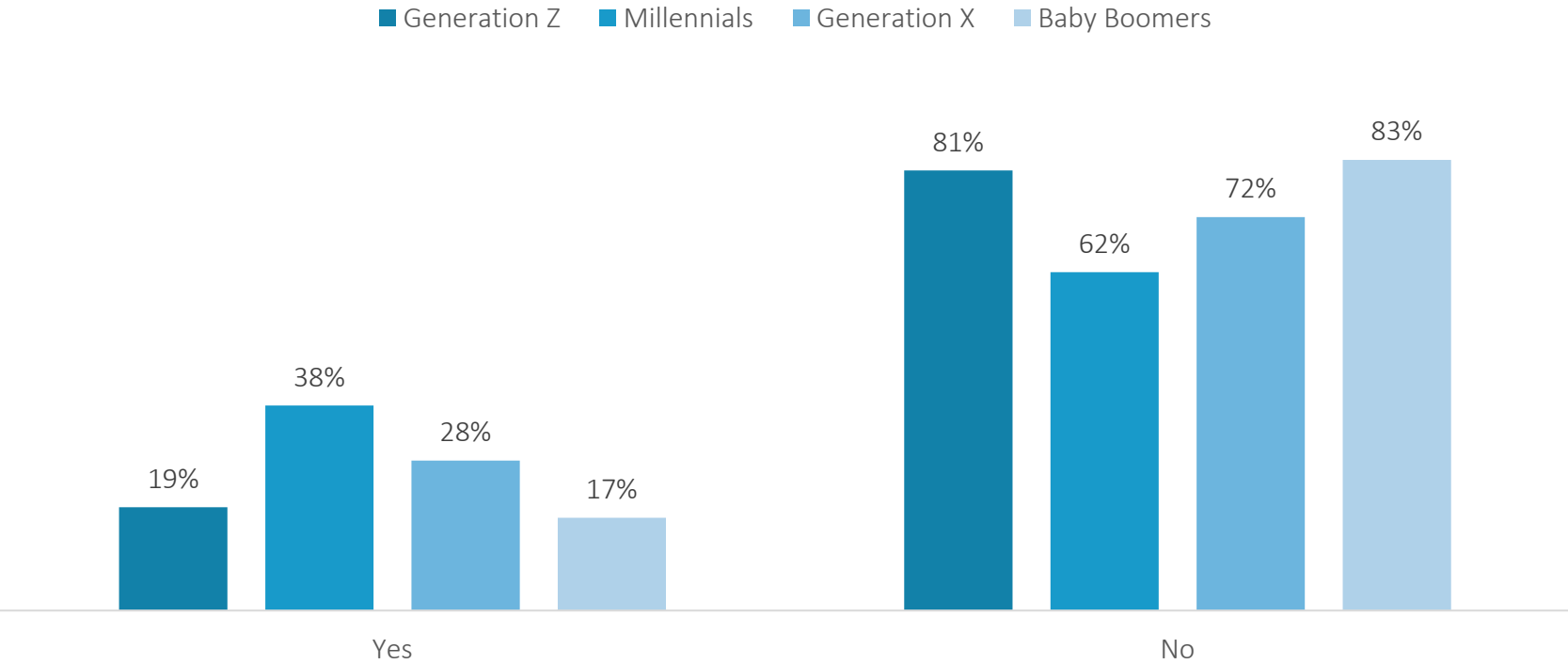
Smoking habits



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Never smoked a cigarette.	48	↑ 83	50	↓ 40	↓ 40
Tried cigarettes a few times.	12	↓ 7	14	↑ 15	10
Smoked cigarettes often, but don't anymore.	12	↓ 2	↓ 7	11	↑ 22
Yes, I currently smoke cigarettes occasionally.	10	↓ 3	↑ 12	11	10
Yes, I smoke cigarettes often.	10	↓ 2	9	↑ 15	11
Smoked cigarettes occasionally but don't anymore.	8	↓ 4	9	9	7
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Have you...?

E-cigarette trial



While three out of four total respondents (73%) had never tried an e-cigarette instead of traditional tobacco products, almost one in five Zers and nearly 40% of Millennials have used some sort of alternative smoking tool.

Sample Size: 2,033 (49% of Respondents) - Have you ever used an e-cigarette or vaporizer instead of traditional tobacco products?

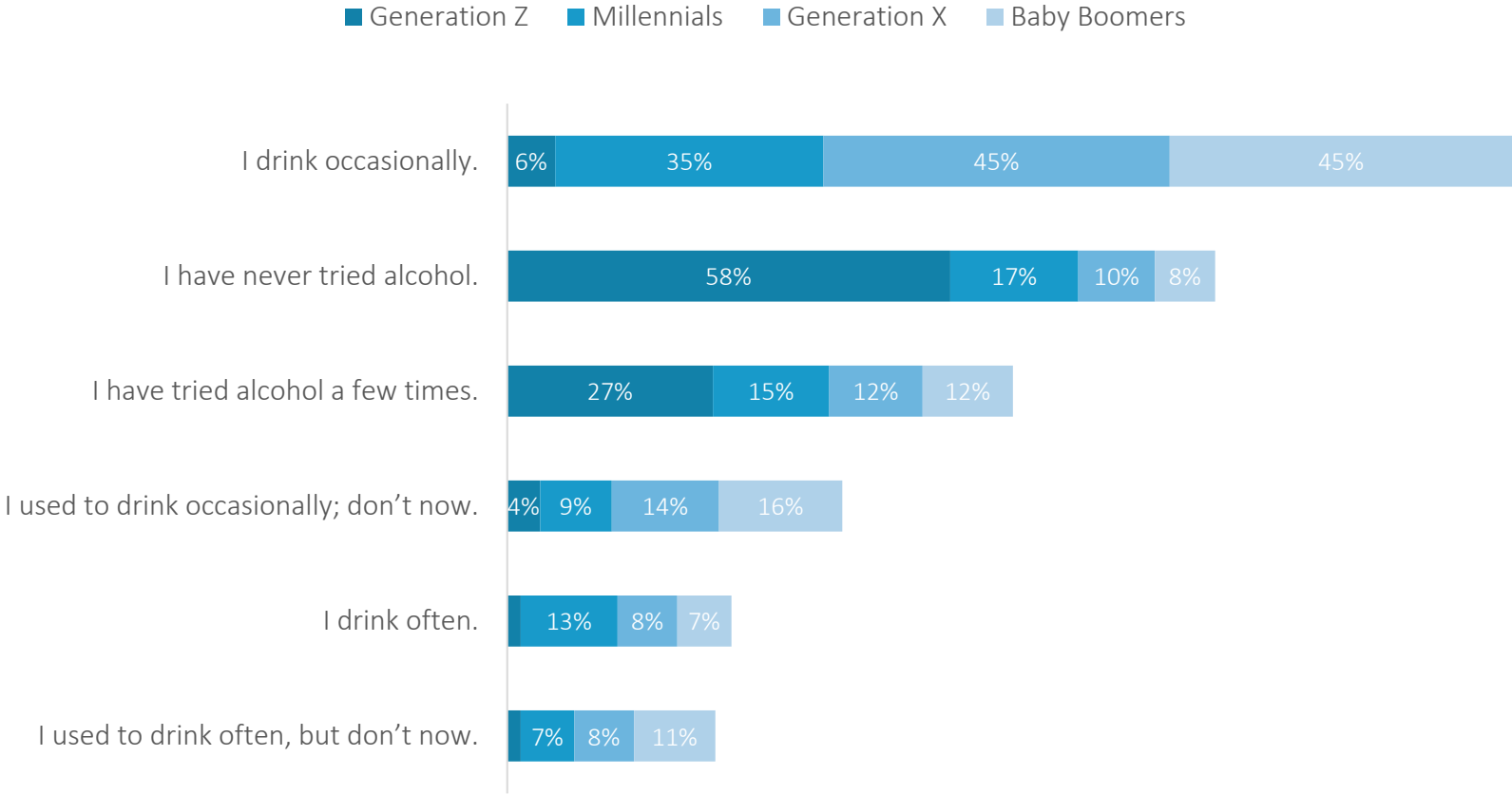
E-cigarette trial



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Yes	27	↓ 19	↑ 38	28	↓ 17
No	73	↑ 81	↓ 62	72	↑ 83
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Have you ever used an e-cigarette or vaporizer instead of traditional tobacco products?

Drinking habits



The three oldest generations most often say that they drink occasionally (33% of all respondents), while 23% have never tried alcohol at all. Still, only 58% of Gen Z – all under the legal limit – say that they’ve never tried alcohol.

Sample Size: 2,033 (49% of Respondents) - Which of the following best describes how much you drink alcohol?

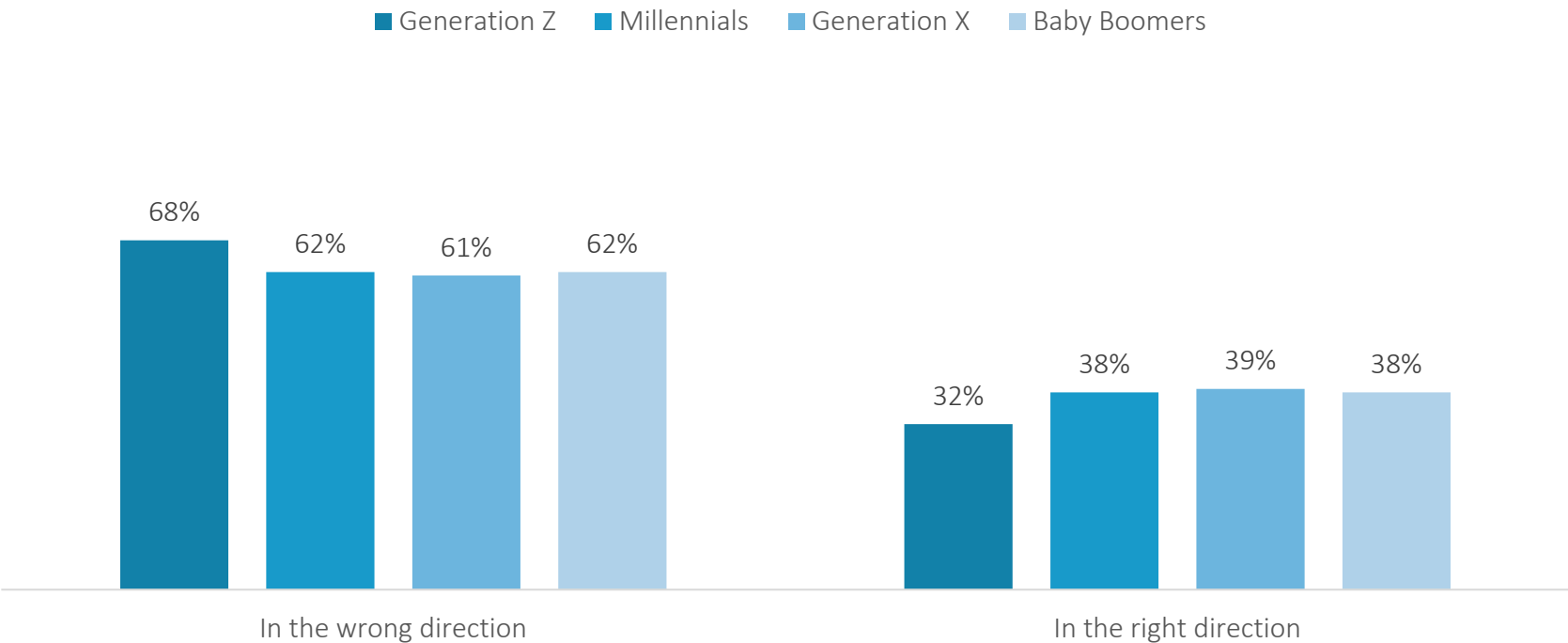
Drinking habits



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
I drink occasionally.	37	↓ 6	35	↑ 45	↑ 45
I have never tried alcohol.	17	↑ 58	↓ 17	↓ 10	↓ 8
I have tried alcohol a few times.	15	↑ 27	15	↓ 12	↓ 12
I used to drink occasionally but don't anymore.	12	↓ 4	9	↑ 14	↑ 16
I used to drink often, but don't anymore.	8	↓ 2	7	8	↑ 11
I drink often.	8	↓ 2	↑ 13	8	7
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Which of the following best describes how much you drink alcohol?

Direction that the U.S. is headed



Across most generations, respondents seem more pessimistic than optimistic when it comes to views regarding the direction in which the U.S. is currently headed: overall, 63% report that the country is headed in the wrong direction. And only 32% of Gen Z sees things headed in the right direction.

Sample Size: 2,033 (49% of Respondents) - Overall, in what direction do you think the U.S. is headed?

Direction that the U.S. is headed



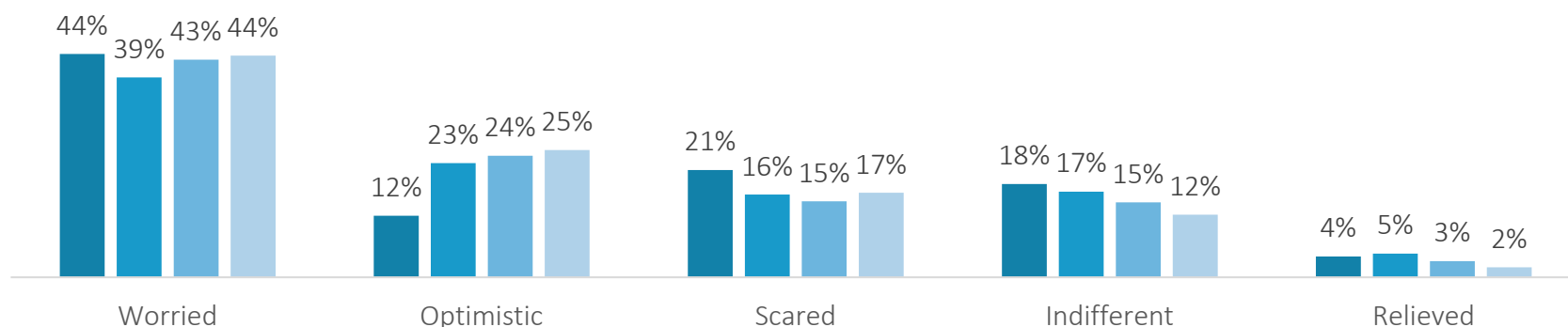
	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
In the wrong direction	62	↑ 68	62	61	62
In the right direction	38	↓ 32	38	39	38
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Overall, in what direction do you think the U.S. is headed?

Feelings about how things are going in the U.S.



■ Generation Z ■ Millennials ■ Generation X ■ Baby Boomers



Of these adjectives, the most popular one-word choice to describe how respondents feel about how things are going in the U.S. today is “worried” (43%). Only 20% overall report feeling “optimistic,” including only 12% of Gen Z [who claim the highest percentage of feeling “scared” (21%)].

Sample Size: 2,033 (49% of Respondents) - Which one word best describes how you feel about how things are going in the U.S. today?

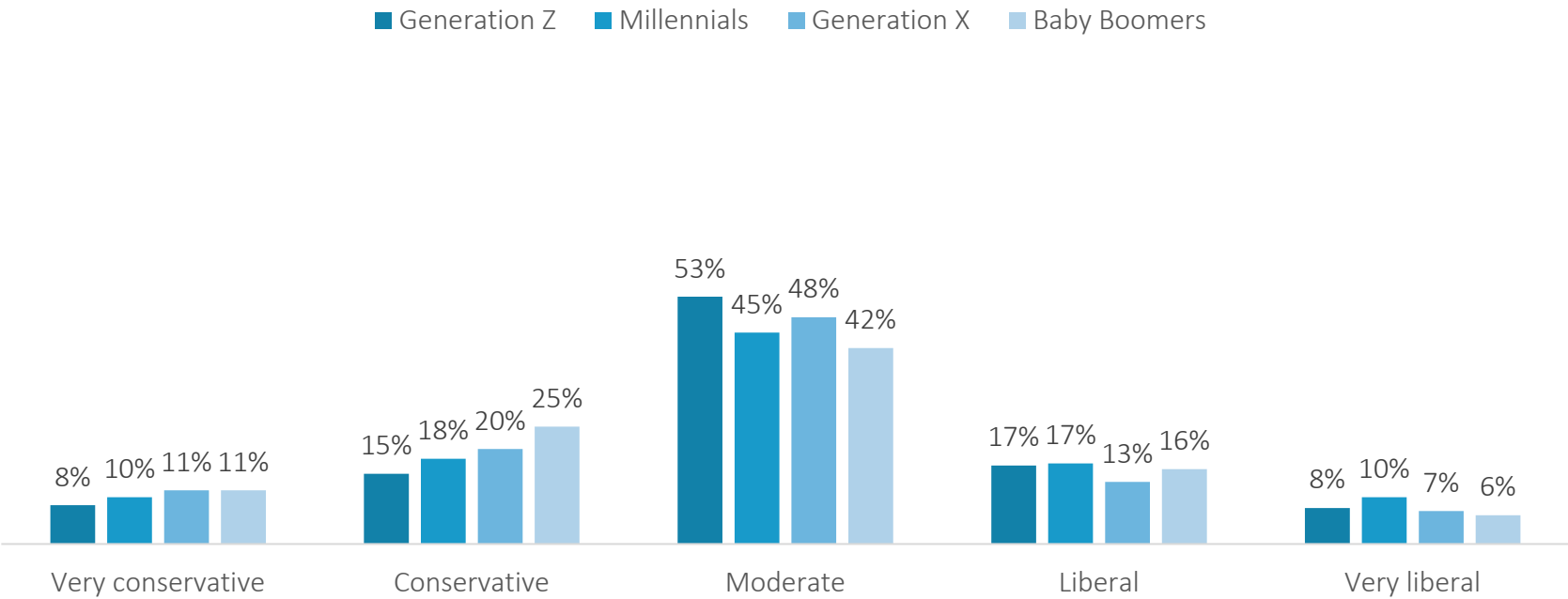
Feelings about how things are going in the U.S.



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Worried	42	44	39	43	44
Optimistic	22	↓ 12	23	24	↑ 25
Scared	17	↑ 21	16	15	17
Indifferent	15	↑ 18	17	15	↓ 12
Relieved	3	4	5	3	↓ 2
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Which one word best describes how you feel about how things are going in the U.S. today?

Political inclination



Roughly half of these Americans overall claim to be moderate in their political views (47%), while the conservative side (31%) tips the scales slightly more than those leaning liberal (24%). More Boomers overall identify their views as conservative (36%), with Millennials and Gen Z considering themselves liberal (27% and 25%).

Sample Size: 2,033 (49% of Respondents) - How would you describe your political views?

Political inclination

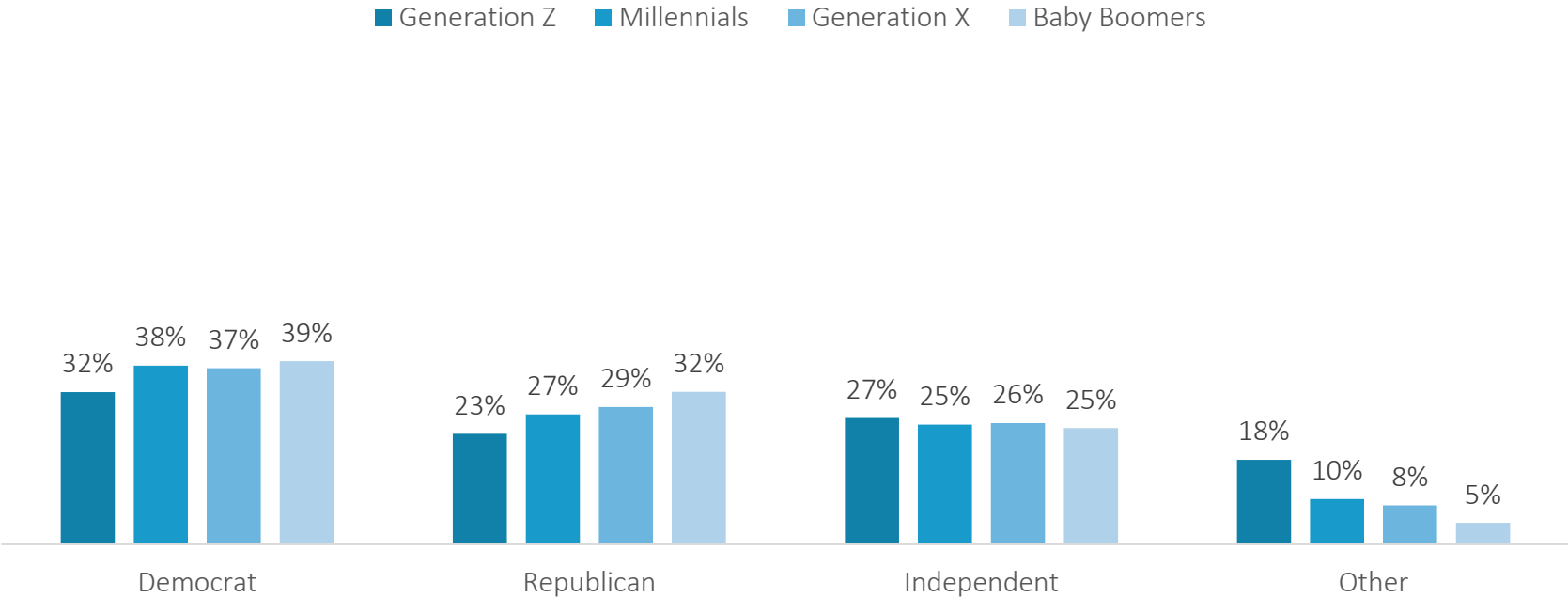


GENERATION

	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
[Very/conservative]	31	23	28	31	36
Very conservative	11	8	10	11	11
Conservative	20	↓ 15	18	20	↑ 25
Moderate	46	↑ 53	45	48	↓ 42
Liberal	16	17	17	13	16
Very liberal	8	8	↑ 10	7	6
[Very/liberal]	24	25	27	20	22
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - How would you describe your political views?

Political party affiliation



More than one-third overall identify as Democrats, with those claiming Republican allegiance at around 30%. The previous question reflects slightly more moderate to conservative tendencies (than liberal), reflecting that many conservatives lean Independent. Notably, nearly half of Gen Z (45%) report affiliation beyond the traditional two parties.

Sample Size: 2,033 (49% of Respondents) - Do you consider yourself a...

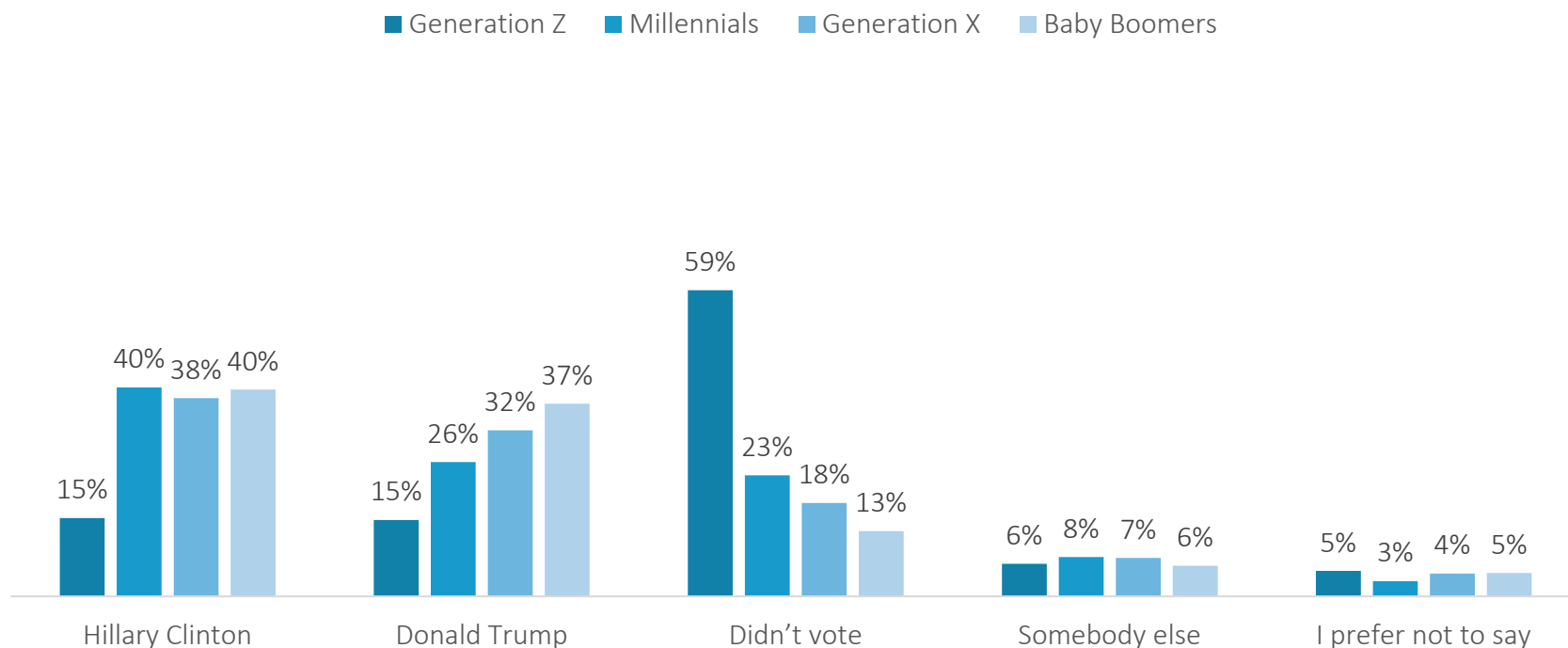
Political party affiliation



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Democrat	37	↓ 32	38	37	39
Republican	29	↓ 23	27	29	↑ 32
Independent	25	27	25	26	25
Other	9	↑ 18	10	8	↓ 5
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Do you consider yourself a...

Presidential vote



Similar to previous measures, the likelihood of leaning conservative (and in this case, voting for Trump) increases with age. Clinton support was similar across the three oldest generations. Most Gen Z respondents were of course too young to vote.

Sample Size: 2,033 (49% of Respondents) - Whom did you vote for in the 2016 Presidential Election?

Presidential vote



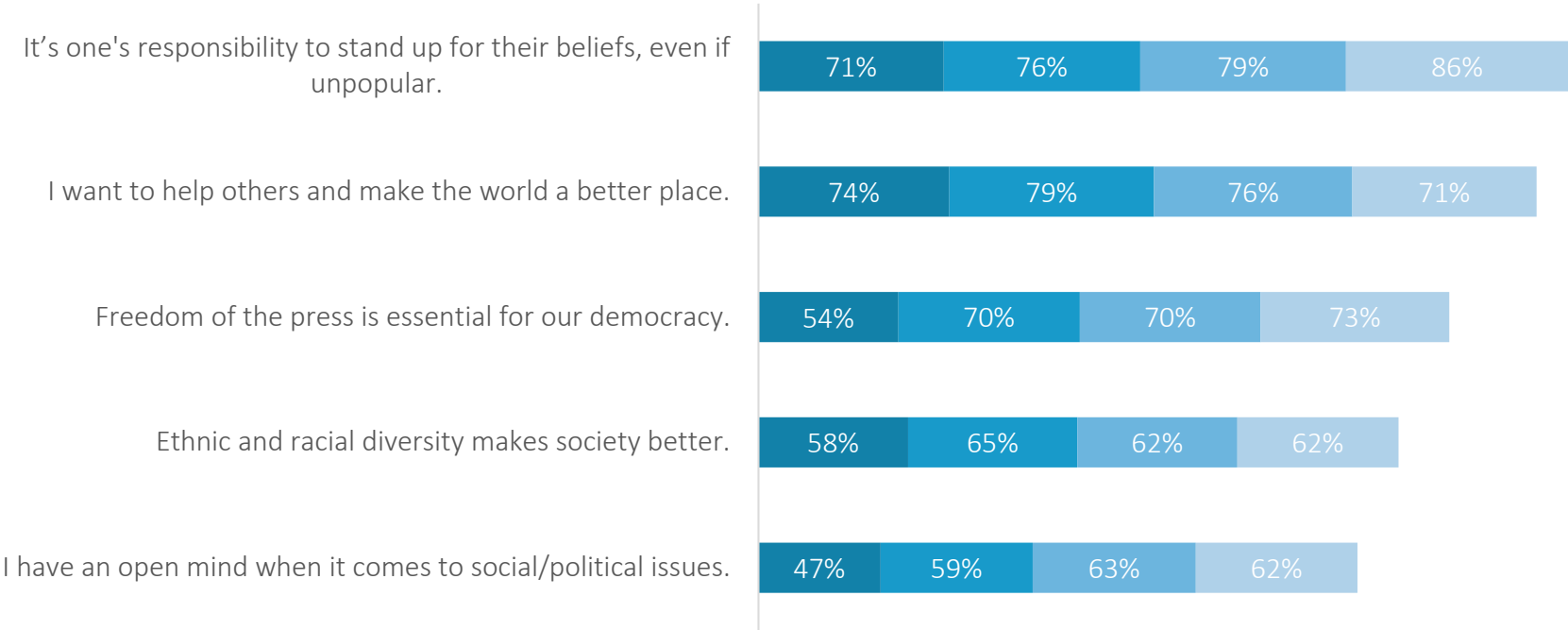
	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Hillary Clinton	37	↓ 15	↑ 40	↑ 38	↑ 40
Donald Trump	30	↓ 15	26	↑ 32	↑ 37
Didn't vote	23	↑ 59	↓ 23	↓ 18	↓ 13
Somebody else	7	6	8	7	6
I prefer not to say	4	5	3	4	5
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Whom did you vote for in the 2016 Presidential Election?

Socio-political views



■ Generation Z ■ Millennials ■ Generation X ■ Baby Boomers



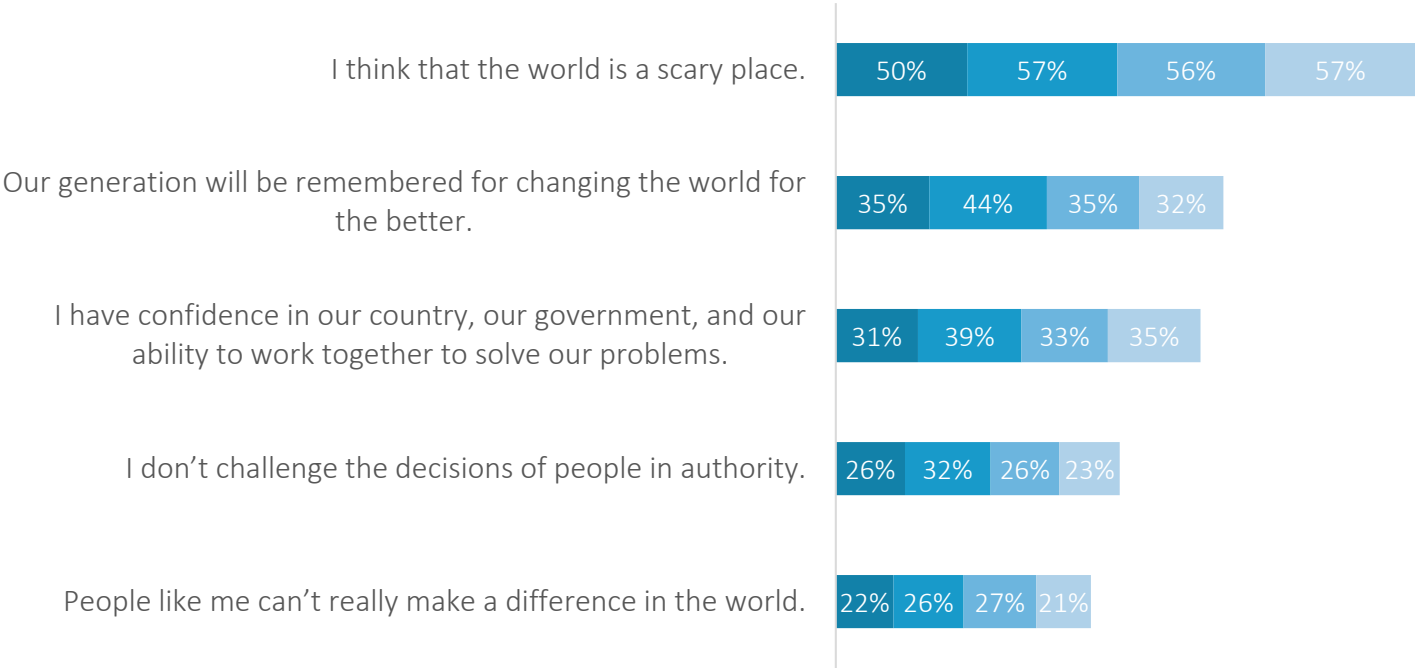
Nearly three-fourths overall agree that people should stand up for their beliefs, even if unpopular – suggesting that this personal confidence increases with age, as 86% of Boomers compared with 71% of Gen Z agree strongly or somewhat. Agreement is lowest among Gen Z on a number of these issues, as they’re not sure what to make of the turmoil they see.

Sample Size: 2,033 (49% of Respondents) - How much do you agree or disagree with the following statements?

Socio-political views (cont'd.)



■ Generation Z ■ Millennials ■ Generation X ■ Baby Boomers



Fifty six percent overall see the world as a scary place, and only around one-third (35%) overall have confidence in the government’s ability to work together to solve our problems. Still, only one-quarter (24%) overall believe that they personally can’t make a difference in the world.

Sample Size: 2,033 (49% of Respondents) - How much do you agree or disagree with the following statements?

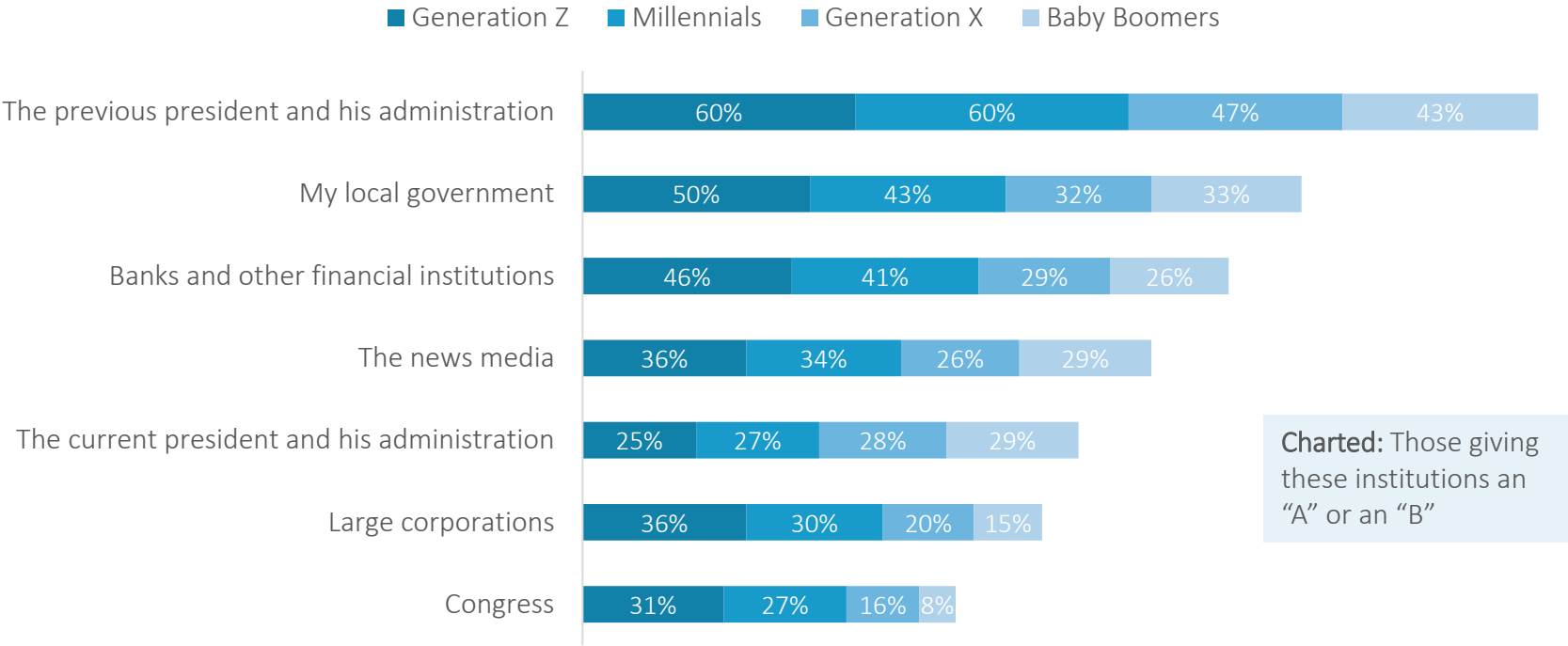
Socio-political views



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
It's a person's responsibility to stand up for his/her beliefs, even if they're not popular.	79	↓ 71	76	79	↑ 86
I want to do things for others and make the world a better place.	75	74	↑ 79	76	↓ 71
Freedom of the press is essential for our democracy.	69	↓ 54	70	70	↑ 73
Ethnic and racial diversity makes society better.	62	↓ 58	65	62	62
I have an open mind when it comes to social and political issues.	59	↓ 47	59	↑ 63	↑ 62
I think that the world is a scary place.	56	↓ 50	57	56	57
Our generation will be remembered for changing the world for the better.	37	35	↑ 44	35	↓ 32
I have confidence in our country, our government, and our ability to work together to solve our problems.	35	31	↑ 39	33	35
I don't challenge the decisions of people in authority.	27	26	↑ 32	26	↓ 23
People like me can't really make a difference in the world.	24	22	26	↑ 27	↓ 21

Sample Size: 2,033 (49% of Respondents) - How much do you agree or disagree with the following statements?

Grading our national institutions



The previous president and his administration receive higher marks, with 52% giving them an A or B grade. Conversely, only 27% rate the current president and his administration top grades, with a full 35% of respondents grading them an F based on how well they’re doing. Seasoned Boomers award the least favorable grades across most of these.

Sample Size: 2,033 (49% of Respondents) - It’s report card time. Please give each a grade from A to F based on how well each is doing... % A + % B

Grading our national institutions



	GENERATION				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box, A + B ratings]	(%)	(%)	(%)	(%)	(%)
The previous president and his administration	52%	↑ 60%	↑ 60%	↓ 47%	↓ 43%
My local government	40%	↑ 50%	43%	↓ 32%	↓ 33%
Banks and other financial institutions	35%	↑ 46%	↑ 41%	↓ 29%	↓ 26%
The news media	31%	↑ 36%	34%	↓ 26%	29%
The current president and his administration	27%	25%	27%	28%	29%
Large corporations	25%	↑ 36%	↑ 30%	↓ 20%	↓ 15%
Congress	20%	↑ 31%	↑ 27%	↓ 16%	↓ 8%

Sample Size: 2,033 (49% of Respondents) - It’s report card time. Please give each a grade from A to F based on how well each is doing... % A + % B

Openness to social issues

	GENERATION				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Social Security	73%	62%	69%	74%	89%
Healthcare for all	69%	68%	68%	68%	72%
Protecting the environment	68%	72%	68%	62%	69%
Marrying someone of a different race	67%	77%	66%	61%	61%
Marriage equality	57%	66%	58%	53%	53%
Living together before marriage	57%	64%	57%	53%	53%
Having tattoos	54%	65%	59%	53%	41%
Legalized medical marijuana	54%	54%	52%	54%	56%
Owning guns	50%	53%	42%	54%	52%
Transgender rights	47%	57%	47%	42%	40%
Base	N=2033	n=510	n=514	n=500	n=509

Hot-button issues like Social Security, healthcare for all, and environmental protection are high on the list of social concerns for all generations. Gen Z skews higher on inter-racial marriage, marriage equality, living together before marriage, and transgender rights. Notably, more than half of all cohorts support legal medical marijuana.

Sample Size: 2,033 (49% of Respondents) - Which of the following are you OK with or in favor of? Select all that apply.

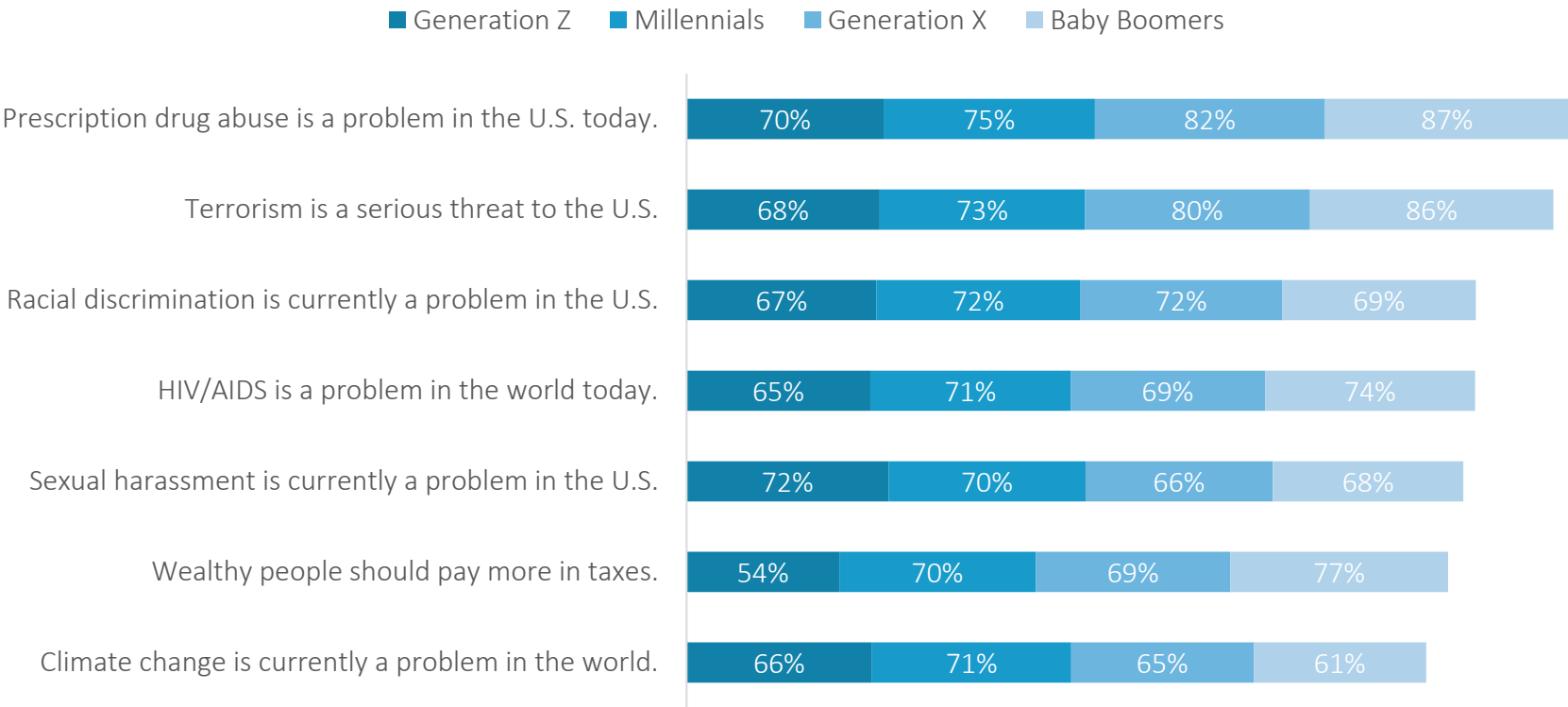
Openness to social issues (cont'd.)

	GENERATION				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Having a baby before marriage	43%	49%	49%	39%	34%
Feminism	41%	51%	40%	34%	39%
Abortion rights	41%	42%	38%	41%	45%
Legalized recreational marijuana	38%	38%	39%	39%	35%
Tougher immigration laws	38%	25%	28%	43%	55%
Gambling	31%	25%	28%	38%	34%
Having an open relationship	26%	37%	27%	20%	18%
Building a border wall between the US and Mexico	24%	19%	19%	27%	32%
Pornography	21%	29%	23%	21%	13%
Dating someone with HIV/AIDS	17%	26%	16%	13%	13%
Legalized prostitution	15%	16%	13%	15%	17%
Base	N=2033	n=510	n=514	n=500	n=509

Half of Gen Z are open to feminism, whereas fewer Millennials (40%), Boomers (39%) and Gen X (34%) support this ideal. Boomers skew higher in their openness to tougher immigration laws and building a border wall. While lower than their openness to medical marijuana (54%), these generations have similar views on legalizing recreational marijuana (38%).

Sample Size: 2,033 (49% of Respondents) Which of the following are you OK with or in favor of? Select all that apply.

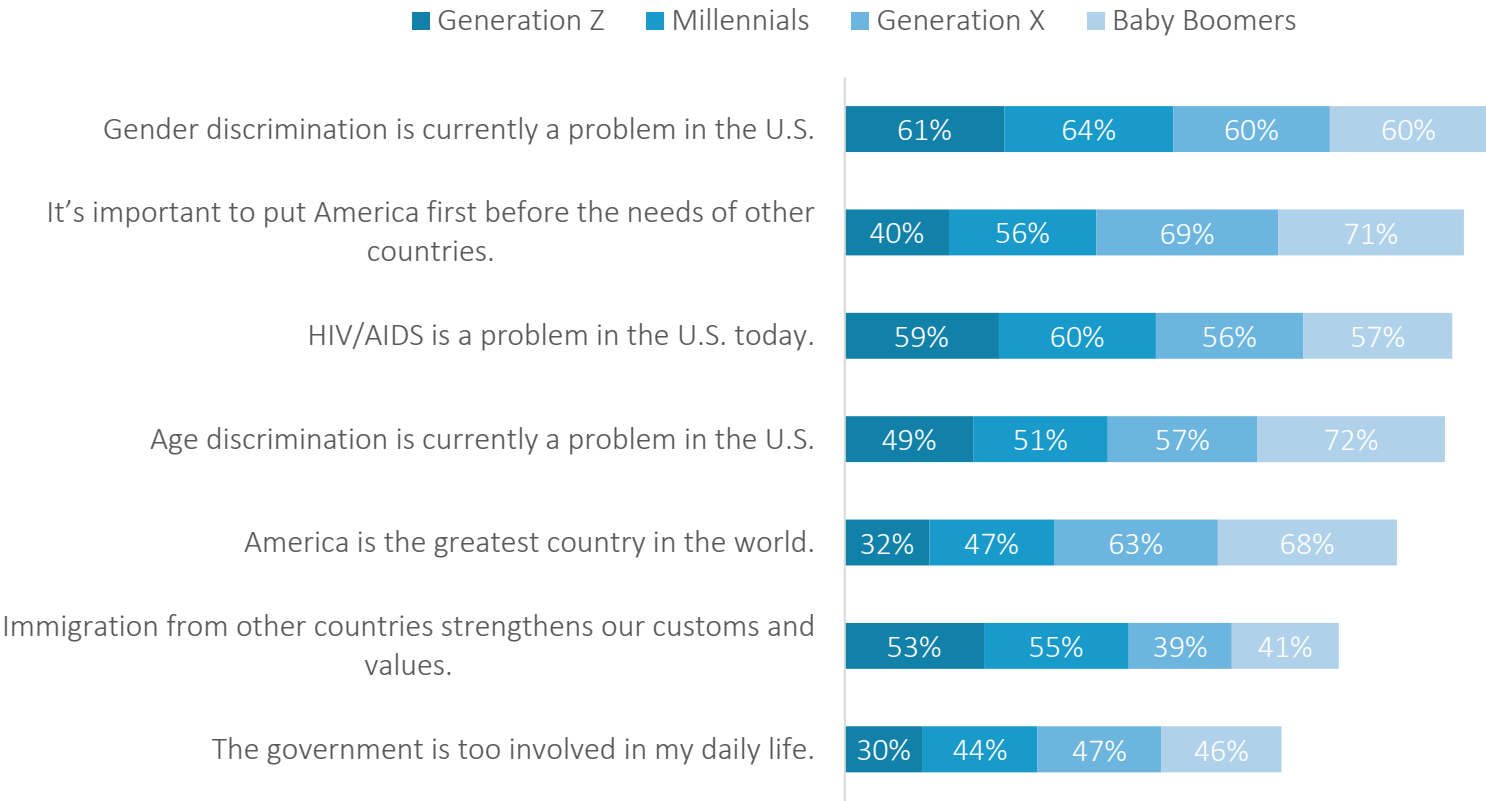
Beliefs about societal issues



Though the degrees to which may differ by generation, these cohorts generally believe that issues like prescription drug abuse, terrorism, racial/sexual discrimination are serious issues today.

Sample Size: 2,032 (49% of Respondents) - How much do you agree or disagree with the following statements?

Beliefs about societal issues (cont'd.)



The ends of the age spectrum view America differently. Boomers lean more “America-first,” whereas Gen Z takes a more global stand. For instance, only 32% of Gen Z consider America to be the greatest country in the world, vs. 68% of Boomers. And 40% of Gen Z vs. 71% of Boomers say that American interests should come before those of other nations.

Sample Size: 2,032 (49% of Respondents) - How much do you agree or disagree with the following statements?

Beliefs about societal issues



GENERATION

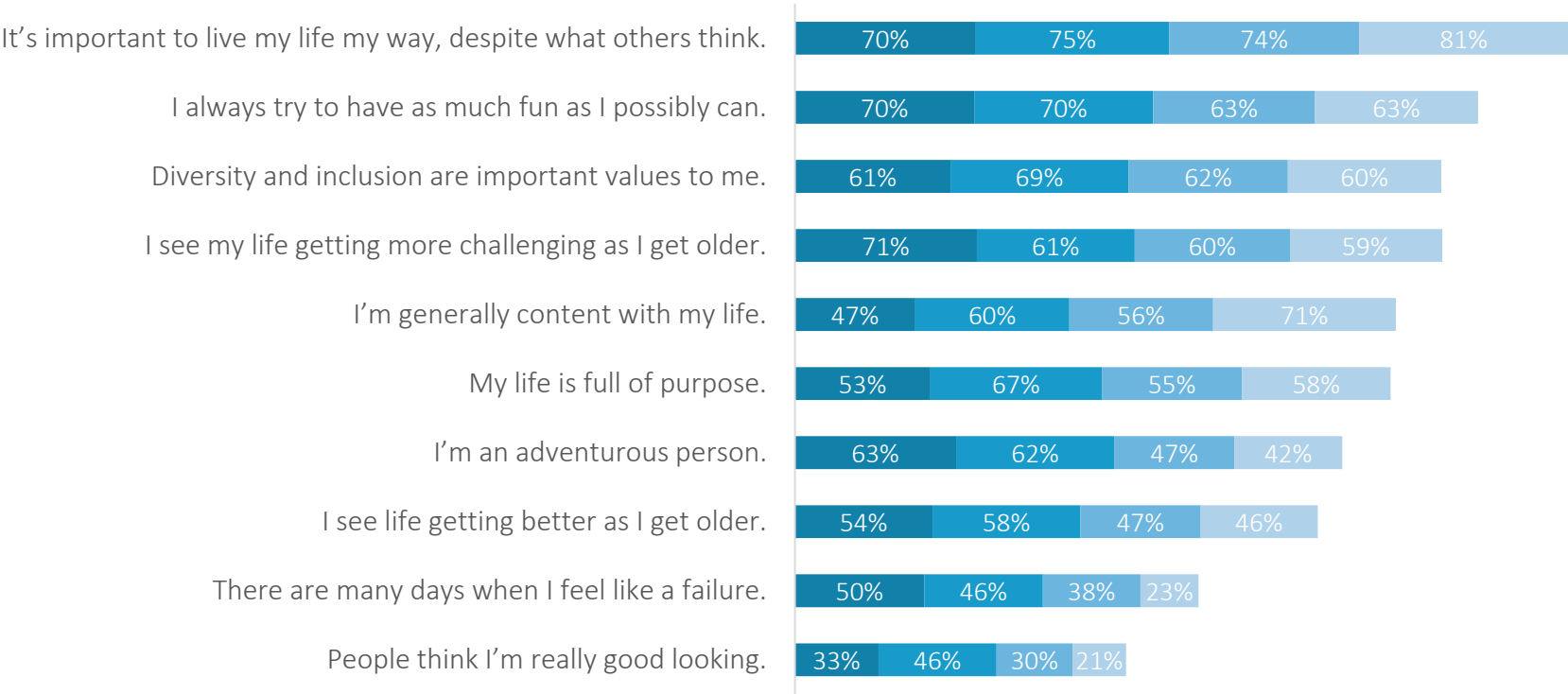
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
Prescription drug abuse is a problem in the U.S. today.	80	↓ 70	↓ 75	↑ 82	↑ 87
Terrorism is a serious threat to the U.S.	78	↓ 68	↓ 73	80	↑ 86
HIV/AIDS is a problem in the world today.	71	↓ 65	71	69	↑ 74
Wealthy people should pay more in taxes.	70	↓ 54	70	69	↑ 77
Racial discrimination is currently a problem in the U.S.	70	67	72	72	69
Sexual harassment is currently a problem in the U.S.	68	72	70	66	68
Climate change is currently a problem in the world.	66	66	↑ 71	65	↓ 61
Gender discrimination is currently a problem	62	61	64	60	60
It's important to put America first before the needs of other countries.	62	↓ 40	56	↑ 69	↑ 71
Age discrimination is currently a problem in the U.S.	59	↓ 49	↓ 51	57	↑ 72
HIV/AIDS is a problem in the U.S. today.	58	59	60	56	57
America is the greatest country in the world.	56	↓ 32	↓ 47	↑ 63	↑ 68
Immigration from other countries strengthens our customs and values.	46	↑ 53	↑ 55	↓ 39	↓ 41
The government is too involved in my daily life.	44	↓ 30	44	↑ 47	↑ 46

Sample Size: 2,032 (49% of Respondents) - How much do you agree or disagree with the following statements?

Life values



■ Generation Z ■ Millennials ■ Generation X ■ Baby Boomers



Boomers are the least concerned with peer pressure: 81% will live their life their way, regardless of what others might think. Even Gen Z, at 70%, doesn't seem all that concerned. Being content with life increases with age, from 47% of Gen Z to 71% of Boomers.

Sample Size: 2,033 (49% of Respondents) - How much do you agree or disagree with the following statements?

Life values



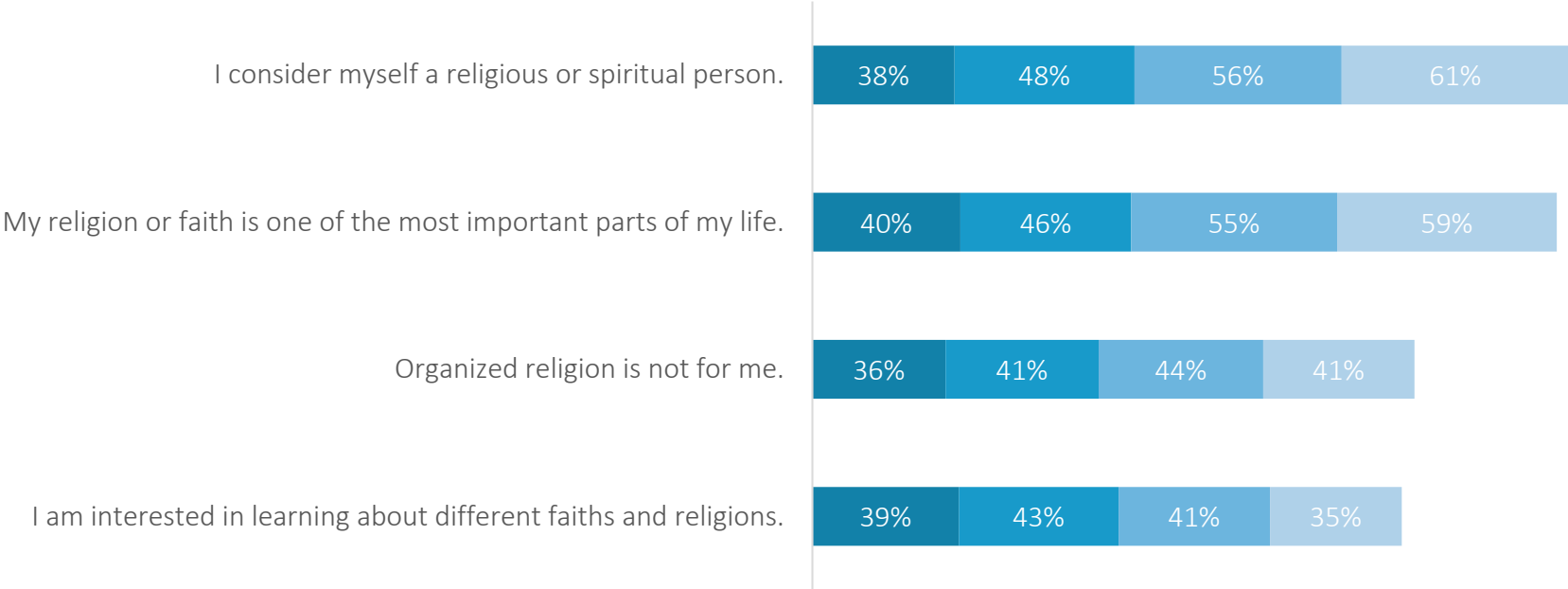
	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
It’s important for me to live my life my way, regardless of what others might think.	76	↓ 70	75	74	↑ 81
I always try to have as much fun as possible.	66	70	70	63	63
Diversity and inclusion are important to me.	63	61	↑ 69	62	60
I see my life getting more challenging as I get older.	62	↑ 71	61	60	↓ 59
I’m generally content with my life.	61	↓ 47	60	56	↑ 71
My life is full of purpose.	59	↓ 53	↑ 67	55	58
I’m an adventurous person.	52	↑ 63	↑ 62	↓ 47	↓ 42
I see life getting better as I get older.	51	54	↑ 58	↓ 47	↓ 46
There are many days when I feel like a failure.	37	↑ 50	↑ 46	38	↓ 23
People think I’m really good looking.	32	33	↑ 46	30	↓ 21

Sample Size: 2,033 (49% of Respondents) - How much do you agree or disagree with the following statements?

Attitudes about religion & faith



■ Generation Z ■ Millennials ■ Generation X ■ Baby Boomers



The younger the respondent, the less religious they are, with fewer than half of Gen Z and Millennials considering themselves a religious or spiritual person or that religion or faith is one of the most important parts of their life (52%). Still, the percentage of respondents agreeing increases with the age.

Sample Size: 2,117 (51% of Respondents) - How much do you agree or disagree with the following statements?

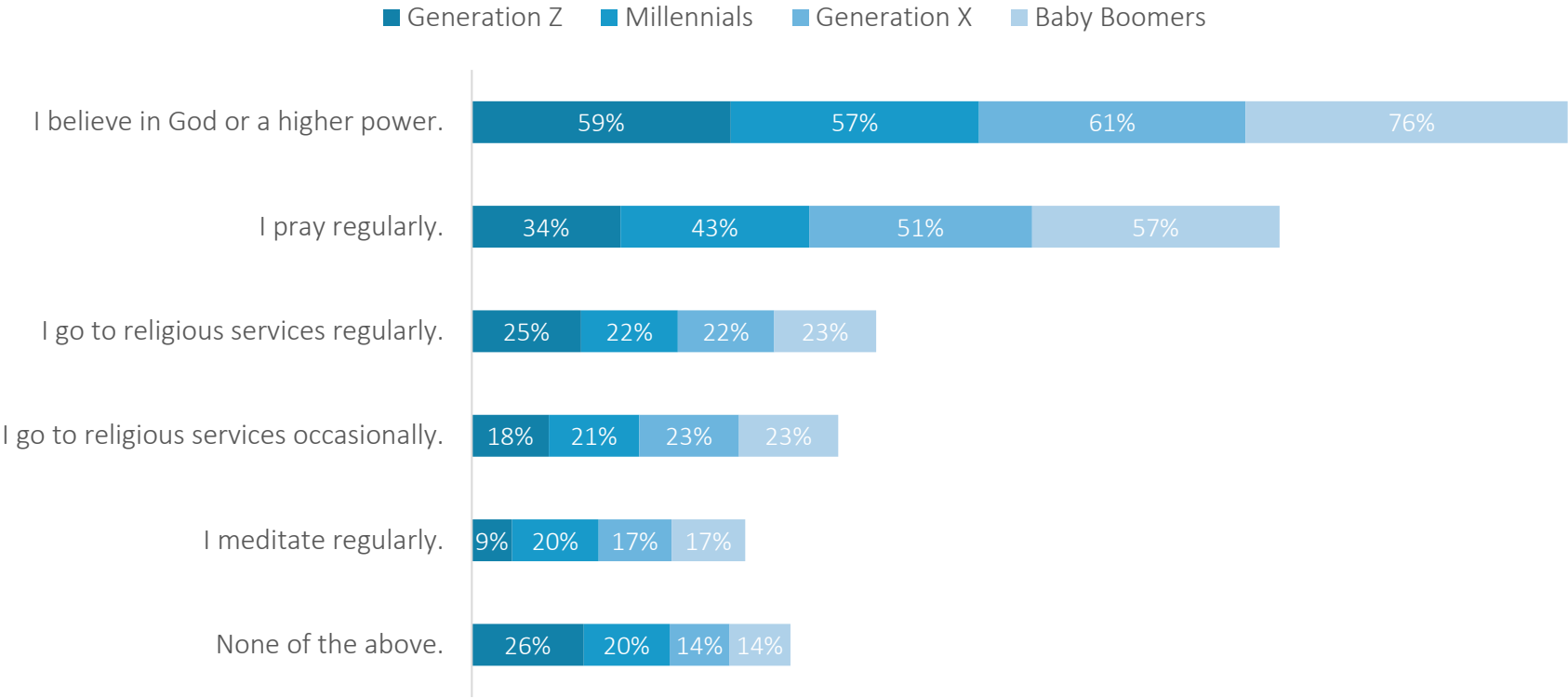
Attitudes about religion & faith



GENERATION					
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
I consider myself a religious or spiritual person.	53	↓ 38	48	↑ 56	↑ 61
My religion or faith is one of the most important parts of my life.	52	↓ 40	↓ 46	↑ 55	↑ 59
Organized religion is not for me.	41	↓ 36	41	↑ 44	41
I am interested in learning about different faiths and religions.	40	39	43	41	↓ 35

Sample Size: 2,117 (51% of Respondents) - How much do you agree or disagree with the following statements?

Spirituality habits



Most spirituality habits and beliefs increase with age. For example, three-fourths of Boomers believe in God, while fewer than two-thirds of Gen Z do. Interestingly, though, the numbers of those going to regular or occasional religious services is fairly consistent across generations.

Sample Size: 2,117 (51% of Respondents) - Which of the following are true for you? Select all that apply.

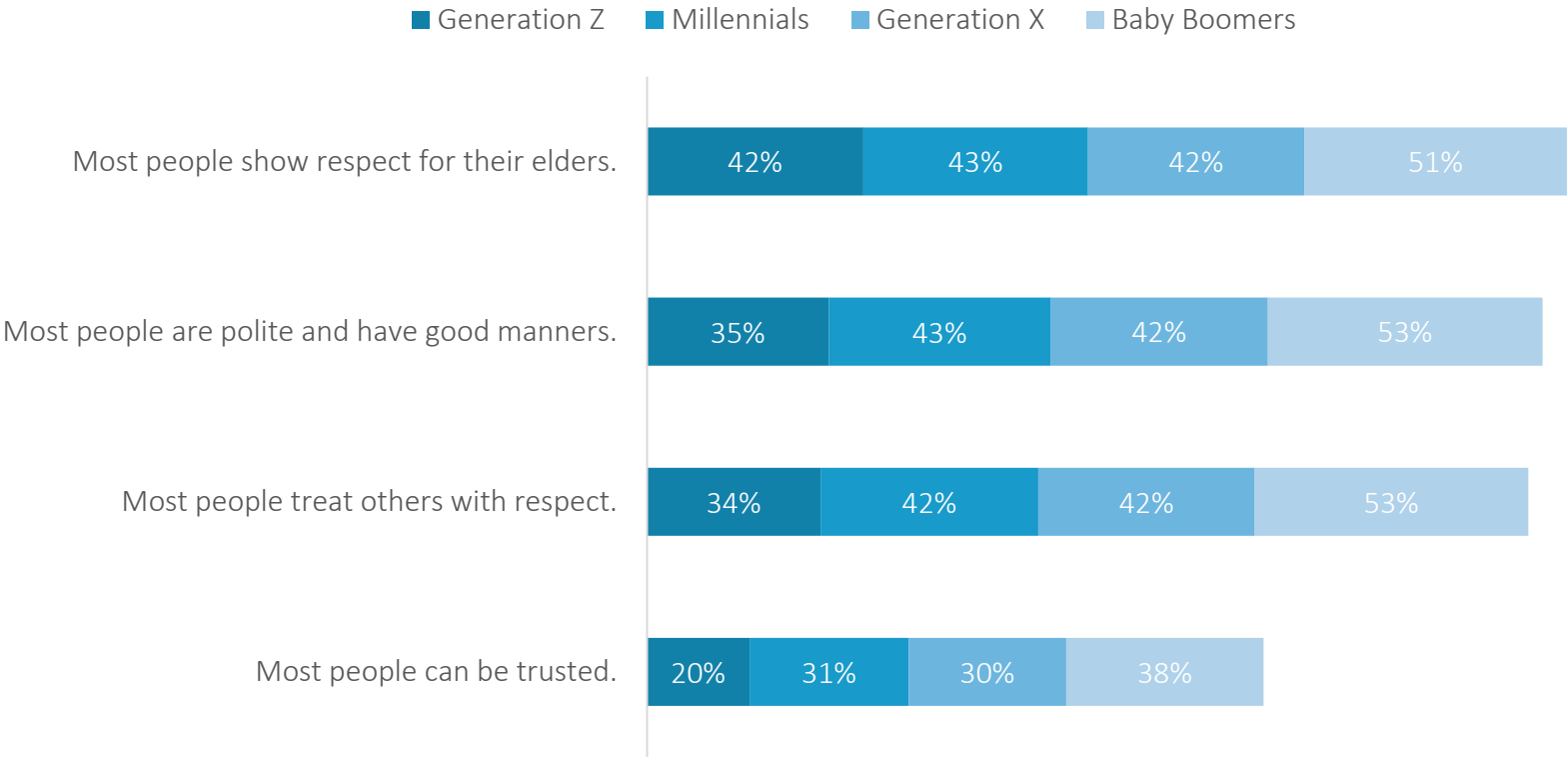
Spirituality habits



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
I believe in God or a higher power.	64	59	57	61	76
I pray regularly.	48	34	43	51	57
I go to religious services regularly.	23	25	22	22	23
I go to religious services occasionally.	21	18	21	23	23
I meditate regularly.	17	9	20	17	17
None of the above.	17	26	20	14	14
Base	N=2117	n=500	n=566	n=540	n=511

Sample Size: 2,117 (51% of Respondents) - Which of the following are true for you? Select all that apply.

Beliefs about respect and trust



In contrast to stereotypes, 53% of Boomers think most people are polite and treat others with respect, compared to just 34-35% of Gen Z. On average, only 30% of all generations believe that people can be trusted, highest among Boomers at 38% and lowest among Gen Z at 20%.

Sample Size: 2,033 (49% of Respondents) - How much do you agree or disagree with the following statements?

Beliefs about respect and trust



GENERATION					
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
Most people are polite and have good manners.	45	↓ 35	43	42	↑ 53
Most people show respect for their elders.	45	42	43	42	↑ 51
Most people treat others with respect.	44	↓ 34	42	42	↑ 53
Most people can be trusted.	32	↓ 20	31	30	↑ 38

Sample Size: 2,033 (49% of Respondents) - How much do you agree or disagree with the following statements?

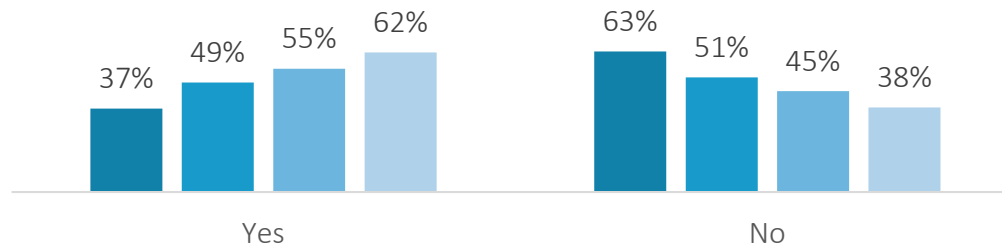


Situational politeness

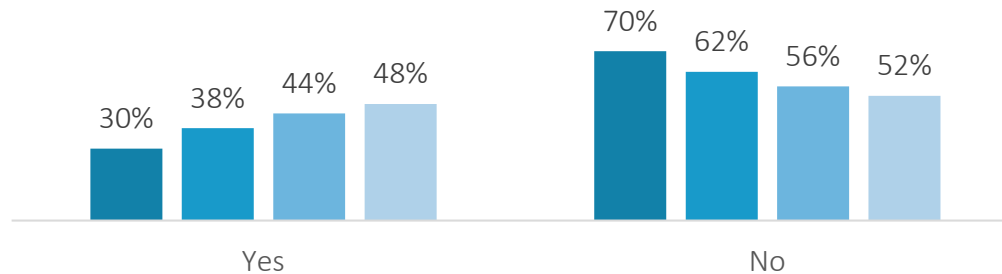
Do you believe that it's impolite to...

■ Generation Z ■ Millennials ■ Generation X ■ Baby Boomers

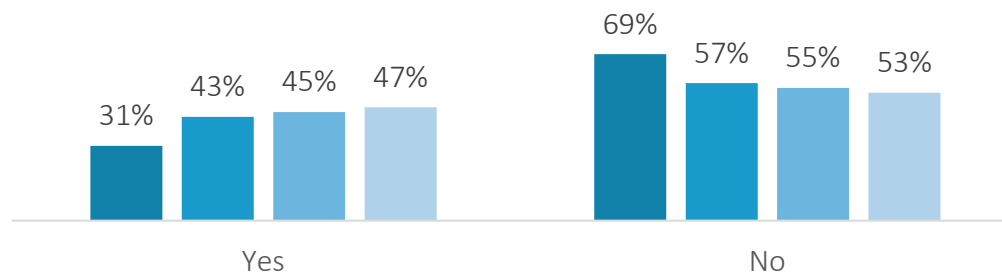
... talk on a cell phone on public transportation (airplanes, buses, trains)?



...talk on a cell phone while grocery shopping?



...talk on a cell phone while on a treadmill at the gym?



Across the board, tolerance for talking on a cell phone in public decreases by age. Gen Z is markedly more accepting of talking in most public venues than other generations. As an example, 31% of Gen Z considers it impolite to talk on a cell phone while on a treadmill at the gym, versus 47% of Boomers.

Sample Size: 2,033 (49% of Respondents) - With the exception of emergency situations, do you believe it's impolite to...?

Situational politeness



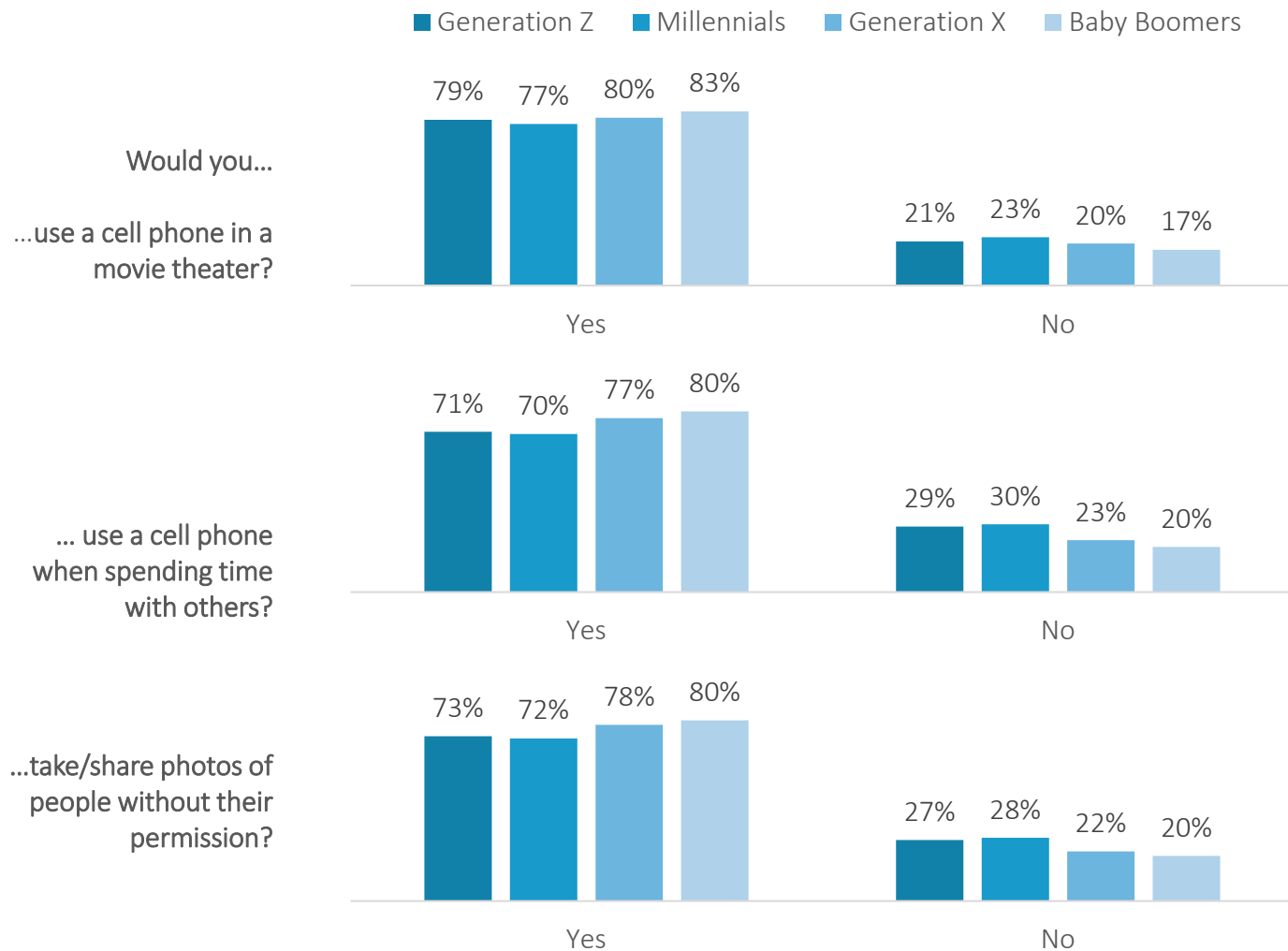
GENERATION

Do you believe that it's impolite to...	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
... talk on a cell phone on public transportation (airplanes, buses, trains)?	(%)	(%)	(%)	(%)	(%)
Yes	53	↓ 37	49	↑ 55	↑ 62
No	47	↑ 63	51	↓ 45	↓ 38
...talk on a cell phone while grocery shopping?					
Yes	42	↓ 30	38	↑ 44	↑ 48
No	58	↑ 70	62	↓ 56	↓ 52
...talk on a cell phone while on a treadmill at the gym?					
Yes	43	↓ 31	43	45	↑ 47
No	57	↑ 69	57	55	↓ 53
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - With the exception of emergency situations, do you believe it's impolite to...?



Situational politeness (cont'd.)



Taking and sharing photos of people without their permission is seen as impolite by 72-80% of respondents, depending on generation.

Sample Size: 2,033 (49% of Respondents) - With the exception of emergency situations, do you believe it's impolite to...?

Situational politeness (cont'd.)



GENERATION

Would you ...	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
... use a cell phone in a movie theater?	(%)	(%)	(%)	(%)	(%)
Yes	80	79	77	80	↑ 83
No	20	21	23	20	↓ 17
...use a cell phone when spending time with others?					
Yes	75	↓ 71	↓ 70	77	↑ 80
No	25	↑ 29	↑ 30	23	↓ 20
...take/share photos of people without their permission?					
Yes	76	73	↓ 72	78	↑ 80
No	24	27	↑ 28	22	↓ 20
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - With the exception of emergency situations, do you believe it's impolite to...?



Self-perceptions (top-rated by generation)

Generation Z		Millennials		Generation X		Baby Boomers	
Description:	(%)	Description:	(%)	Description:	(%)	Description:	(%)
Loyal	71%	Loyal	67%	Loyal	67%	Trustworthy	80%
Kind	69%	Trustworthy	61%	Trustworthy	66%	Loyal	73%
Trustworthy	67%	Kind	60%	Kind	62%	Kind	72%
Funny	66%	Funny	58%	A hard worker	59%	A hard worker	63%
Creative	64%	A hard worker	57%	Funny	53%	A bargain hunter	61%
Open-minded	55%	Creative	55%	Open-minded	52%	Open-minded	57%
A hard worker	53%	Open-minded	47%	A bargain hunter	47%	Optimistic	47%
Stressed out	46%	Tech-savvy	45%	Creative	42%	Traditional	47%
Tech-savvy	45%	Confident	41%	Optimistic	36%	Spiritual	44%
A gamer	45%	Optimistic	38%	Tech-savvy	35%	Organized	43%
Competitive	40%	A gamer	36%	Organized	34%	Confident	43%
Confident	39%	A bargain hunter	36%	Confident	31%	Patriotic	42%
A leader	36%	Organized	35%	Spiritual	31%	Funny	39%
Optimistic	35%	Competitive	34%	Traditional	31%	Creative	39%
Organized	34%	Stressed out	33%	Stressed out	29%	Tech-savvy	27%
Experimental	33%	A leader	28%	Patriotic	27%	Outdoorsy	25%
An intellectual	29%	Spiritual	28%	Competitive	26%	Maternal	22%
Spiritual	26%	An intellectual	27%	A leader	24%	Competitive	20%
Outdoorsy	26%	Experimental	26%	An intellectual	24%	A leader	19%
n=510		n=514		n=500		n=509	

Sample Size: 2,033 (49% of Respondents) - Do you consider yourself...?

Self-perceptions (full list by total)



	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Loyal	70%	71%	67%	67%	73%
Trustworthy	68%	67%	61%	66%	80%
Kind	66%	69%	60%	62%	72%
A hard worker	58%	53%	57%	59%	63%
Funny	54%	66%	58%	53%	39%
Open-minded	52%	55%	47%	52%	57%
Creative	50%	64%	55%	42%	39%
A bargain hunter	42%	25%	36%	47%	61%
Optimistic	39%	35%	38%	36%	47%
Confident	39%	39%	41%	31%	43%
Tech-savvy	38%	45%	45%	35%	27%
Organized	37%	34%	35%	34%	43%
Spiritual	32%	26%	28%	31%	44%
Stressed out	30%	46%	33%	29%	14%
Competitive	30%	40%	34%	26%	20%
Traditional	28%	13%	21%	31%	47%
A leader	27%	36%	28%	24%	19%
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Do you consider yourself...?

Self-perceptions (full list by total), *cont'd.*



	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
A gamer	26%	45%	36%	16%	6%
Patriotic	26%	15%	18%	27%	42%
An intellectual	24%	29%	27%	24%	18%
Outdoorsy	24%	26%	23%	22%	25%
Experimental	21%	33%	26%	17%	10%
Skeptical	19%	23%	17%	22%	15%
Maternal	17%	8%	19%	19%	22%
Environmental	17%	19%	18%	12%	17%
Non-conforming	16%	15%	15%	17%	16%
A smart investor	15%	15%	18%	12%	16%
Rebellious	13%	23%	12%	12%	6%
Disorganized	13%	20%	13%	11%	8%
A trend setter	12%	17%	16%	10%	4%
Pessimistic	11%	14%	11%	13%	8%
A big spender	9%	19%	11%	6%	1%
An entrepreneur	9%	9%	11%	10%	6%
Paternal	7%	5%	6%	6%	11%
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Do you consider yourself...?

Activity participation (top-rated by generation)



Generation Z		Millennials		Generation X		Baby Boomers	
Description:	(%)	Description:	(%)	Description:	(%)	Description:	(%)
Played a game on phone or tablet	76%	Tried a new restaurant	61%	Played a game on my phone or tablet	53%	Read a book	50%
Tried a new restaurant	65%	Played a game on my phone or tablet	58%	Tried a new restaurant	48%	Tried a new restaurant	47%
Made a new friend	60%	Read a book	49%	Read a book	48%	Played a game on my phone or tablet	39%
Played a videogame	59%	Played a videogame	47%	Went to a movie theater	45%	Attended church or other religious service	36%
Read a book	58%	Went to a movie theater	47%	Driven over the speed limit	33%	Went to a movie theater	35%
Went to a movie theater	54%	Spent time outdoors	42%	Spent time outdoors	32%	Driven over the speed limit	34%
Spent time outdoors	52%	Made a new friend	39%	Played a videogame	30%	Spent time outdoors	31%
Learned a new skill	42%	Traveled out of state	35%	Traveled out of state	27%	Traveled out of state	31%
Attended church or other religious service	38%	Driven over the speed limit	34%	Attended church or other religious service	26%	Made a new friend	21%
Traveled out of state	31%	Learned a new skill	29%	Made a new friend	24%	Volunteered	19%
Gone to a party	29%	Gone to a party	29%	Gone to a party	19%	Gone to a party	17%
Volunteered	23%	Attended church or other religious service	28%	Learned a new skill	18%	Attended a concert/music festival	13%
Driven over the speed limit	22%	Attended a concert/music festival	22%	Attended a concert/music festival	15%	Played a videogame	10%
Attended a concert/music festival	20%	Went on a date	22%	Volunteered	13%	Learned a new skill	8%
Went on a date	18%	Volunteered	17%	Had too much to drink	11%	Had too much to drink	6%
Smoked/consumed a form of marijuana	10%	Had too much to drink	17%	Went on a date	8%	Went on a date	6%

Sample Size: 2,033 (49% of Respondents) - Have you done any of the following in the last three months?

Activity participation (full list by total)



GENERATION

	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Played a game on my phone or tablet	56%	76%	58%	53%	39%
Tried a new restaurant	55%	65%	61%	48%	47%
Read a book	51%	58%	49%	48%	50%
Went to a movie theater	45%	54%	47%	45%	35%
Spent time outdoors	39%	52%	42%	32%	31%
Played a videogame	37%	59%	47%	30%	10%
Made a new friend	36%	60%	39%	24%	21%
Attended church or other religious service	32%	38%	28%	26%	36%
Traveled out of state	31%	31%	35%	27%	31%
Driven over the speed limit	31%	22%	34%	33%	34%
Learned a new skill	24%	42%	29%	18%	8%
Gone to a party	24%	29%	29%	19%	17%
Volunteered	18%	23%	17%	13%	19%
Attended a concert/music festival	17%	20%	22%	15%	13%
Went on a date	14%	18%	22%	8%	6%
Had too much to drink	10%	8%	17%	11%	6%
Smoked/consumed a form of marijuana	9%	10%	13%	8%	6%
"Hooked up"	7%	9%	9%	6%	2%
Attended a political rally, protest, march, or town hall	4%	4%	6%	2%	4%
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Have you done any of the following in the last three months?

Professional sports fandom



GENERATION

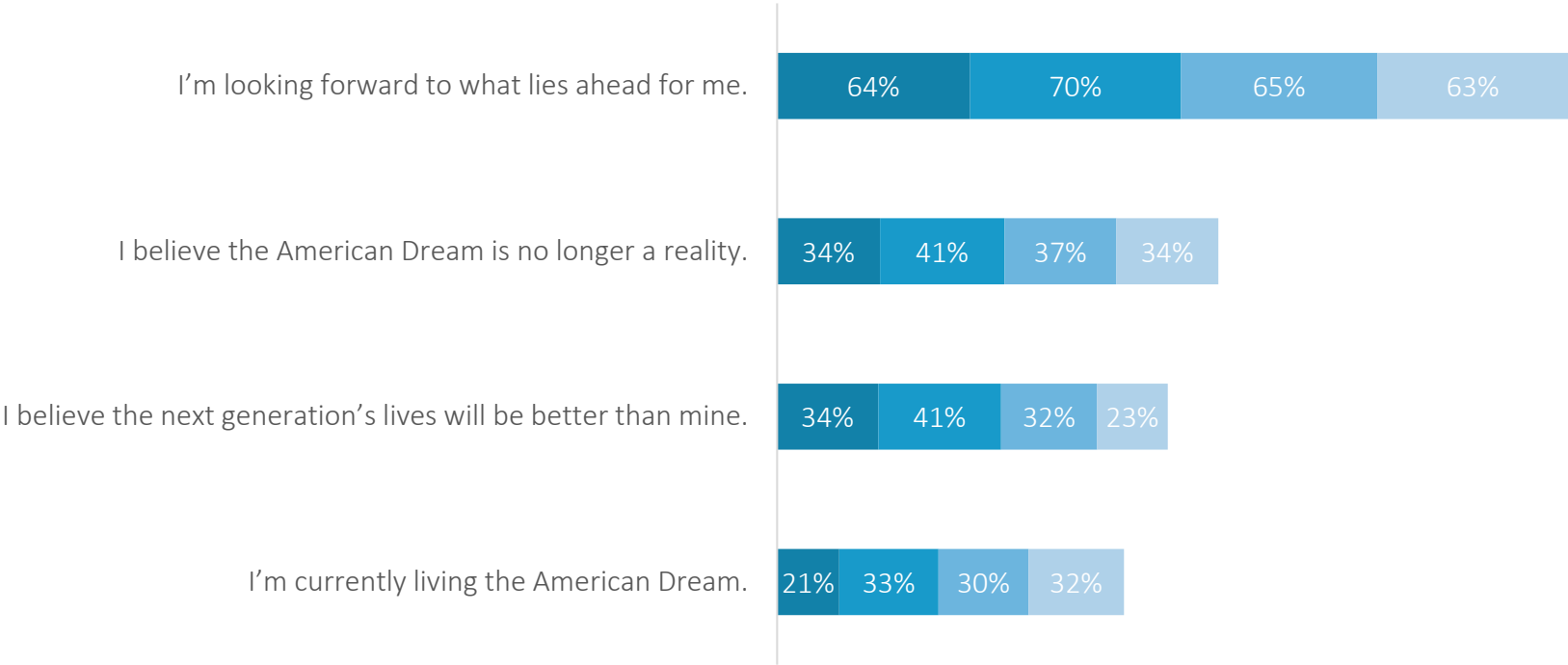
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
NFL	49	38	51	50	51
NBA	36	36	46	38	24
MLB	30	18	28	32	35
None of the above	27	37	21	26	31
College football	26	16	25	27	30
College basketball	20	14	19	21	21
NHL	16	10	18	18	15
NASCAR	15	7	17	16	16
UFC	11	10	18	11	4
MMA	8	8	11	9	4
PGA	8	4	6	8	10
X Games	7	7	12	6	2
MLS	6	3	8	6	3
WNBA	3	4	4	3	3
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Are you a fan of any of the following? (e.g. you regularly watch/read about the sport, have a favorite team or athlete, etc.)

Future outlook



■ Generation Z ■ Millennials ■ Generation X ■ Baby Boomers



While approximately two-thirds look forward to what's ahead of them [especially Millennials (70%)], only around one-third overall believe that the American Dream is a reality. Only 23% of Boomers expect that the next generation's lives will be better than theirs, yet 41% of Millennials see better days ahead.

Sample Size: 2,033 (49% of Respondents) - How much do you agree or disagree with the following statements?

Future outlook



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
[Top-Two Box]	(%)	(%)	(%)	(%)	(%)
I'm looking forward to what lies ahead for me.	66	64	↑ 70	65	63
I believe the American Dream is no longer a reality.	37	34	↑ 41	37	34
I believe the next generation's lives will be better than mine.	32	34	↑ 41	32	↓ 23
I'm currently living the American Dream.	30	↓ 21	↑ 33	30	32

Sample Size: 2,033 (49% of Respondents) - How much do you agree or disagree with the following statements?

Signs of a successful life

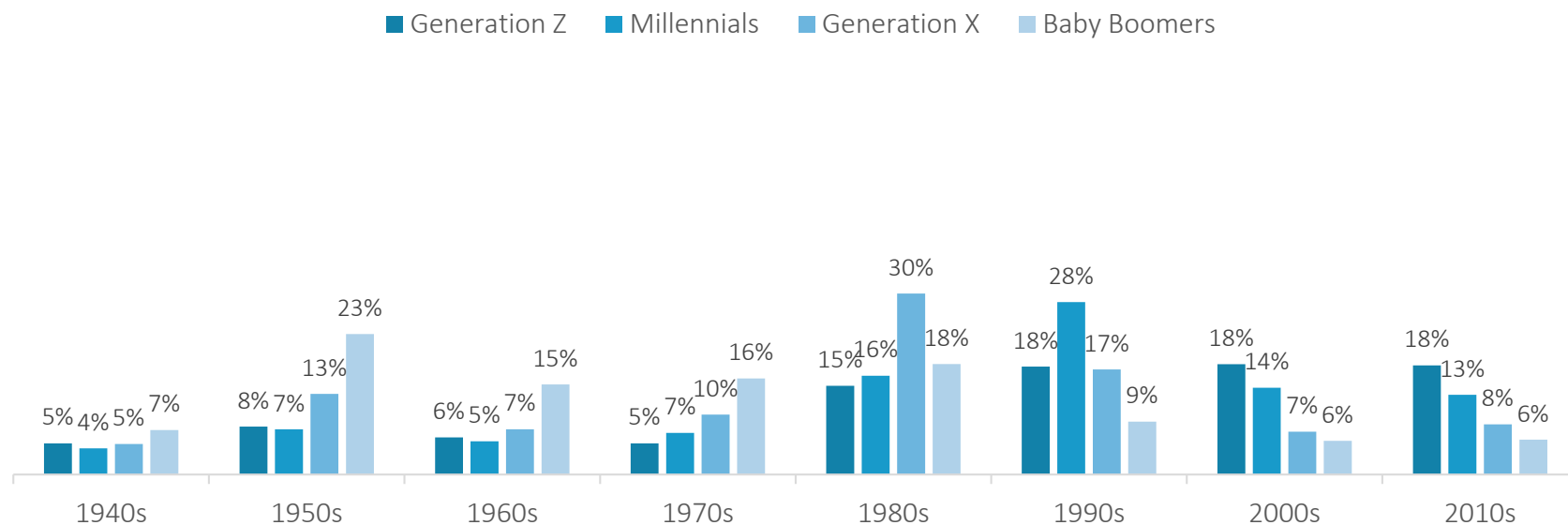


GENERATION

	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Having a long, healthy life.	64%	66%	64%	61%	66%
Having a happy marriage.	60%	64%	58%	57%	60%
Helping others.	47%	45%	43%	47%	52%
Having children.	46%	42%	47%	42%	52%
Being a good friend.	44%	44%	37%	43%	54%
Having a successful career.	40%	58%	47%	30%	25%
Being a good parent.	36%	31%	35%	36%	40%
Traveling the world.	33%	44%	43%	28%	17%
Being debt-free.	32%	26%	23%	36%	44%
Owning a home.	31%	29%	26%	30%	39%
Being able to retire when you want to.	31%	26%	28%	30%	40%
Making a difference in someone's life.	30%	28%	25%	29%	37%
Spending lots of time with your family.	28%	21%	27%	31%	34%
Having grandchildren.	26%	17%	25%	21%	40%
Graduating from college.	25%	43%	27%	14%	17%
Following your faith.	25%	21%	20%	25%	34%
Having lots of money.	25%	28%	30%	26%	15%
Having a job you love.	23%	31%	22%	21%	17%
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - Which of the following do you feel are the most important signs of a successful life? (select up to 5)

Greatest American decade



While a handful of these Americans name the 40s or earlier as the greatest American decade, these cohorts generally name the decades where they personally have historical perspective -- the 90s and above for Gen Z, the 80s and above for Millennials, the 80s and 90s for Gen X, and the 50s through the 80s for Boomers. Notably, the most recent decades are relatively lower overall for Boomers and Gen X.

Sample Size: 2,033 (49% of Respondents) - In which one of these decades would you say the U.S. was at its greatest?

Greatest American decade



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
1920s	2	↑ 5	3	2	↓ 1
1930s	1	↑ 3	2	1	↓ <1
1940s	5	5	4	5	↑ 7
1950s	14	↓ 8	↓ 7	13	↑ 23
1960s	9	↓ 6	↓ 5	7	↑ 15
1970s	10	↓ 5	↓ 7	10	↑ 16
1980s	20	↓ 15	↓ 16	↑ 30	18
1990s	18	18	↑ 28	17	↓ 9
2000s	10	↑ 18	↑ 14	↓ 7	↓ 6
2010s	10	↑ 18	13	↓ 8	↓ 6
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - In which one of these decades would you say the U.S. was at its greatest?

Age aspiration

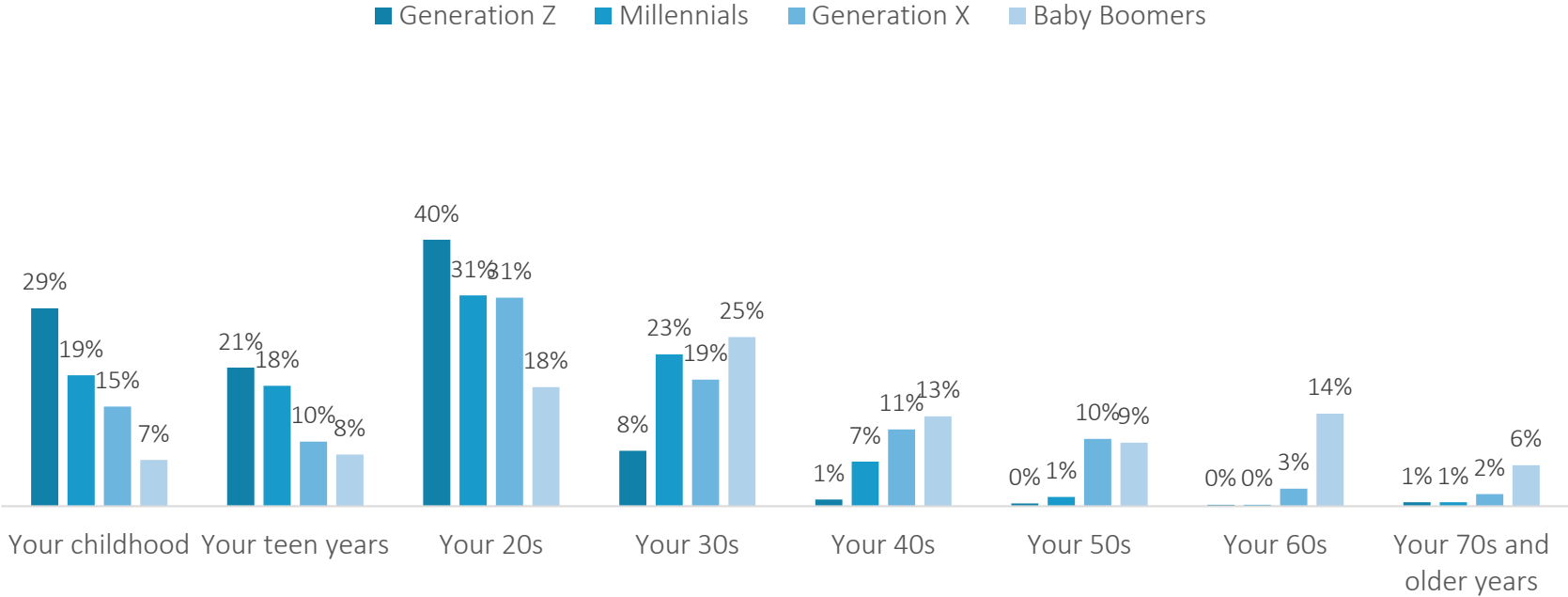


	GENERATION				
	Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Under 20	26%	↑ 43%	↑ 36%	↓ 15%	↓ 9%
20s	42%	49%	46%	46%	↓ 26%
30s	18%	↓ 6%	↓ 13%	↑ 23%	↑ 29%
40s	7%	↓ 1%	↓ 2%	10%	↑ 15%
50s	4%	0%	2%	3%	10%
60s	3%	0%	1%	1%	9%
70+	1%	0%	1%	1%	2%
Aspired age		21	21	25	34
Base	N=2025	n=508	n=511	n=498	n=508

When asked the age they would most like to be, the average aspired age for Gen Z and Millennials is the magical age of 21, whereas Boomers would like to go back to their early 30s when they were feeling more settled. Note that there is only a 13-year gap between these four generations, reflecting the allure of being older for Gen Z and youth for Boomers.

Sample Size: 2,025 (49% of Respondents) – If you could be any age right now, what would you be? (write in, whole numbers only)

The best part of your life



When asked to name what is, was or is expected to be the best part of their lives, Gen Z through Gen X hone in on their 20s, while Boomers gravitate to their 30s. Still, their perceptions are not totally clear-cut, as the generations also show nostalgia for the past and expectations for the future.

Sample Size: 2,033 (49% of Respondents) - What has been, or do you expect to be, the best part of your life?

The best part of your life



	GENERATION				
	Weighted Total	Generation Z	Millennials	Generation X	Baby Boomers
	(%)	(%)	(%)	(%)	(%)
Your childhood	16	↑ 29	19	15	↓ 7
Your teen years	13	↑ 21	↑ 18	↓ 10	↓ 8
Your 20s	28	↑ 40	31	31	↓ 18
Your 30s	21	↓ 8	↑ 23	19	↑ 25
Your 40s	9	↓ 1	7	↑ 11	↑ 13
Your 50s	6	↓ <1	↓ 1	↑ 10	↑ 9
Your 60s	5	↓ <1	↓ <1	↓ 3	↑ 14
Your 70s and older years	3	↓ 1	↓ 1	2	↑ 6
Base	N=2033	n=510	n=514	n=500	n=509

Sample Size: 2,033 (49% of Respondents) - What has been, or do you expect to be, the best part of your life?

Sample Validity

As this was not a probability-based sample, calculating the theoretical margin of sampling error is not applicable. However, as with probability surveys, it is important to keep in mind that results are estimates and typically vary within a narrow range around the actual value that would be calculated by completing a census of everyone in a population. One estimate of this precision is the credibility interval; for this survey, the credibility interval is plus or minus 2 percentage points for questions answered by all respondents (the interval is larger for questions answered by fewer respondents). Again, as with probability surveys, on occasion the results from a particular question will be completely outside a typical interval of error.

There are many types of survey errors that can limit the ability to generalize to a population. Throughout the research process, Researchscape followed a Total Survey Quality approach designed to minimize error at each stage, recognizing that multiple sources of error can reduce the validity of survey research:

- Besides sampling error, five types of non-sampling error can occur: specification error, frame error, nonresponse error, measurement error, and processing error.
- At each step in the survey research process, the research team followed best practices and used quality controls to minimize the impact of these sources of error. Panel surveys sometimes suffer from inattentive respondents or spam.
- Researchscape followed a 43-step process for data cleansing, profiling responses on five behaviors (inattentiveness, speed of response, straight-lining, poor verbatim responses, and suspicious IP activity).
- Any respondent committing two or more penalties was removed from the data set; research on research has shown that results are less representative when excluding respondents who commit one penalty, as any one behavior might be typical of that respondent or a momentary lapse of attentiveness.

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