

MARKETING TO MILLENNIALS

CANADA, AUGUST 2019



MINTEL

CONDITIONS OF USE

Congratulations on your purchase of a limited license to this Mintel report! Mintel Group Ltd. ("Mintel") is the publisher and licensor of this report; the licensee of this report is the original purchaser ("you"). Absent another written agreement between Mintel and you, the following conditions of use govern your access to and use of this report.

1. **GRANT AND SCOPE OF LICENSE.** Subject to the restrictions under clause 2, Mintel grants to you a personal, revocable, non-exclusive, non-sublicensable, and non-transferable right and license to access and use this report for your internal business purposes.
2. **LICENSE RESTRICTIONS.**
 - A. Absent advance written consent by Mintel, you may not grant access to, sell, pass on, communicate, or distribute this report or its content to any third party, including any of your affiliates. Principles of Fair Use do not apply to your use of this report.
 - B. The purchase or use by a Non-Participating Retailer (or an agent or professional advisor working on its account) of any Infoscan data sourced by Information Resources, Inc., and contained in this report is prohibited. Accordingly, you will not knowingly disclose any Infoscan data contained in this report to a Non-Participating Retailer. As of 1 October 2015, the Non-Participating Retailers are Aldi, Amazon, Costco, Dollar Tree, Lidl, Trader Joe's, and Whole Foods (current list available at www.mintel.com/legal/non-participating-retailers).
 - C. You will neither encourage financial reliance by third parties upon, nor invite investment from others based upon, this report without first obtaining the written consent of Mintel's corporate secretary to do so, which Mintel may withhold in its absolute discretion. Absent such consent, you will defend, indemnify, and hold harmless Mintel against any claims made against Mintel based upon such encouragement or invitation.
3. **INTELLECTUAL PROPERTY.** As between Mintel and you, this report, including but not limited to the content, design, look, layout, appearance, and graphics, is the copyright property and confidential information of Mintel. You disclaim, and Mintel reserves, all right, title, and interest in this report, and all copies thereof, not expressly granted by these conditions of use, whether by implication, estoppel, or otherwise.
4. **DISCLAIMER OF WARRANTY.** THIS REPORT IS PROVIDED "AS IS." MINTEL MAKES NO REPRESENTATION OR WARRANTY WITH RESPECT TO CORRECTNESS, COMPLETENESS, OR CURRENTNESS AND SPECIFICALLY DISCLAIMS ANY WARRANTY, WHETHER EXPRESS, IMPLIED, OR STATUTORY, INCLUDING ANY WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. THIS REPORT NEITHER GIVES INVESTMENT OR PROFESSIONAL ADVICE NOR ADVOCATES ANY COURSE OF ACTION.
5. **INDEMNIFICATION.** You will defend, indemnify, and hold harmless Mintel from and against all costs, liabilities, losses, and expenses (including reasonable attorneys' fees) (collectively, "Losses") arising from any third party claim, demand, complaint, or action arising from unlicensed access or use of this report. Mintel will defend, indemnify, and hold harmless you from and against any Losses arising from any third party claim, demand, complaint, or action arising from your licensed access or use of this report and alleging that this report infringes any intellectual property right.
6. **LIMITATION OF LIABILITY.** TO THE FULLEST EXTENT PERMITTED BY APPLICABLE LAW AND EXCEPT FOR ANY INDEMNITY UNDER CLAUSE 5, NEITHER PARTY, NOR ANY OF ITS AFFILIATES, OFFICERS, EMPLOYEES, OR AGENTS, WILL BE LIABLE IN CONNECTION WITH THIS REPORT FOR ANY INDIRECT, SPECIAL, EXEMPLARY, PUNITIVE, OR CONSEQUENTIAL DAMAGES, INCLUDING WITHOUT LIMITATION LOSS OF GOOD WILL AND LOST PROFITS OR REVENUE, WHETHER OR NOT SUCH DAMAGES ARE BASED IN CONTRACT, WARRANTY, TORT, NEGLIGENCE, STRICT LIABILITY, OR OTHERWISE (EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGES), AND NEITHER PARTY'S AGGREGATE LIABILITY WILL EXCEED THE FEE PAYABLE TO MINTEL BY YOU FOR THIS REPORT.
7. **ENTIRE AGREEMENT.** These conditions of use, together with any Mintel documentation of your order, constitute the entire understanding between Mintel and you regarding this report and may be amended only by a written instrument duly executed by Mintel and you. No purchase order issued by you will modify these conditions of use, even if signed by Mintel.
8. **CHOICE OF LAW AND JURISDICTION.** Use of this report and any dispute arising out of such use is subject to the laws of England, and you irrevocably submit to the exclusive jurisdiction of the English courts situated in London, United Kingdom, provided that if your use or a dispute arising from your use arises within the United States, then such use or dispute is subject to the laws of the State of Illinois, and you irrevocably submit to the exclusive jurisdiction of the state and federal courts situated in Chicago, Illinois.

Contents

OVERVIEW..... 6

What you need to know	7
Definitions.....	7

EXECUTIVE SUMMARY..... 8

The issues	9
Figure 1: "Responsibilities prevent me from doing the things I want" (% any agree), Millennials vs overall, June 2019.....	9
Figure 2: Achievement of financial goals, June 2019.....	9
Figure 3: "The brands I use reinforce the image I want to portray" (% any agree), by generation, June 2019.....	10
Opportunities	10
Figure 4: Selected activities enjoyed the most (any rank), Millennial mothers with under-18s at home vs Millennial women who do not have children, June 2019.....	10
Figure 5: "I'd rather spend money on experiences than things" (% any agree), Millennial parents with under-18s at home vs those who are not a parent, June 2019.....	11
Figure 6: "Life seems easier for my friends than for me" (% any agree), Millennial fathers vs Millennial mothers, June 2019	11
What it means	12

THE MARKET..... 13

What You Need to Know 14

Major life markers fall within the Millennial age definition	14
Millennial moms grew up with working moms	14
Millennials are more ethnically diverse.....	14

Market Factors 15

Millennials are at a true transition point	15
Figure 7: Average age of mother at first birth, 1945-2016	15
Millennials make up a quarter of the population, and are growing up	15
Figure 8: Canadian population, by age group, 2018.....	16
More employed moms than before, more pressure on Millennial moms.....	16
Figure 9: Employment status of couple families with at least one child aged under 16, May 2016	16
Millennials are more ethnically diverse than older generations.....	17
Figure 10: Distribution of foreign-born population in Canada, by region of birth, 1871 to 2036	17
Figure 11: Self-identification of ethnicity, by generation, June 2019	18

KEY PLAYERS..... 19

What You Need to Know 20

Industries are gaining from blurring adulthood/childhood lines	20
The experiential generation makes shopping more interesting	20
Tech is opening hearts and minds and companies are responding	20
Lifestyle shaming is unproductive and masks bigger issues.....	20

What's Trending?..... 21

Spotlight on challenging what 'adulthood' looks like	21
Figure 12: Play Great Games Together – Nintendo Switch, May 2018	21
Spotlight on Millennials as 'The Experience Generation'	22
Figure 13: "I'd rather spend money on experiences than things" (% any agree), by generation, June 2019	22
Spotlight on Millennials as 'The Wellness Generation' or 'Generation Health'	22
Figure 14: #EatTogether 2017, December 2016.....	23
Figure 15: #EatTogether 2019, December 2018.....	24

What's Not Working?	25
Lifestyle shaming	25
Figure 16: Suze Orman: How Your Daily Coffee Habit Is Costing You \$1 Million, March 2019	25
Figure 17: Attitudes towards the usage of social media (% any agree), by generation, June 2019	26
What's Next?	27
More avenues to address holistic health thanks to Millennial interests	27
Figure 18: Money Talks Story #1 – Sophia + Imran, December 2018	27
Figure 19: Money Talks Story #2 – Alyssa + Keith, December 2018	28
THE CONSUMER	29
What You Need to Know	30
Millennials are growing up...	30
...and are busy	30
Favourite activities vary by lifestage	30
Reliance on tech makes them different to older generations	30
For Millennials, brands are an extension of the self	30
Today's Millennial Lifestage	31
Bucking stereotypical images – they're 'the convenience generation' for a reason	31
Figure 20: Key demographics: works full time and parents with under-18s at home, by generations, June 2019	31
Figure 21: PC Express – The Talk 30sec, May 2019	32
Millennials are catching up financially and optimistic about achieving goals	32
Figure 22: Achievement of financial goals, June 2019	32
Figure 23: Achievement of financial goals, Millennials vs older generations June 2019	33
Millennial women need more assistance with financial management	33
Figure 24: Achievement of financial goals, by gender, June 2019	34
Figure 25: Money is Changing: The Cost, February 2019	34
Figure 26: Money is Changing: Pay equality in Hollywood, February 2019	35
Perception of Current Lifestage	36
Millennials see themselves as being in transition	36
Figure 27: Correspondence Analysis – Symmetrical map – Generational perspectives, June 2019	36
Figure 28: #EatTogether 2018, December 2017	37
Most aren't quite where they thought they'd be, but they're optimistic	37
Figure 29: Attitudes towards current lifestage (% any agree), June 2019	37
Figure 30: Attitudes towards current lifestage (% any agree), Millennials vs overall, June 2019	38
Parenting for the Millennials is unique	38
Figure 31: McCafé Mobile Order and Pay Singing, March 2019	39
Figure 32: PC Financial Cake Mix, May 2019	39
Figure 33: Attitudes towards current lifestage (% any agree), Millennials vs overall, June 2019	40
Figure 34: Generation Voice is here, September 2018	40
Millennial Worries	41
Millennial are in a transitional period, as are their worries	41
Figure 35: Stressors (any rank), by generation, June 2019	41
More 'titles' means more stressors for Millennial women	42
Figure 36: Stressor: 'keeping up with everything I need to do' (any rank), married millennial women vs millennials overall, June 2019	42
Figure 37: Stressor: 'trying to make everyone happy' (any rank), millennial mothers vs millennials overall, June 2019	43
Figure 38: McCafé Mobile Order and Pay Singing, March 2019	43
Four in 10 have older children, making family relationships an area of focus	43
Figure 39: Stressor: 'relationships with family members (any rank), millennial parents with 6-17s at home vs millennials overall, June 2019	44
Figure 40: Parents Love It, April 2019	44
Figure 41: Share Reel Love for Father's Day, June 2017	45
Figure 42: Stressors: 'romantic relationships' and 'relationships with friends' (any rank), younger millennial men vs millennials overall, June 2019	45

Young Millennial men find personal relationships stressful	46
Favourite Activities.....	47
Family time tops the list	47
Figure 43: Activities enjoyed the most (any rank), by generation, June 2019.....	47
Motherhood defines Millennial Moms.....	48
Figure 44: 'Spending time with my family' as activity enjoyed the most (any rank), Millennial mothers vs all Millennials, June 2019	48
'Girls night in' grows up: catering to childless Millennial women	49
Figure 45: Selected activities enjoyed the most (any rank), Millennial women who do not have under-18s vs all Millennials, June 2019	49
Young Millennial men enjoy physical activities and video games.....	50
Figure 46: Selected activities enjoyed the most (any rank), young Millennial men vs all Millennials, June 2019.....	50
The Impact of Tech on Interactions	51
In some ways, more tech means more problems for Millennials.....	51
Figure 47: Attitudes towards communicating with tech (% any agree), by generation, June 2019.....	51
Figure 48: Attitudes towards the impact of communicating with tech (% any agree), by generation, June 2019	51
Figure 49: Anuncio Ruavieja 2018 – Tenemos que vernos más, November 2018	52
Millennial dads feel like they're getting the short end of the stick.....	53
Figure 50: "Life seems easier for my friends than for me" (% any agree), Millennial fathers vs all Millennials, June 2019.....	53
Figure 51: John Legend's "Stinky Booty" Song with Pampers, June 2018.....	53
Figure 52: Pampers, Adam Levine, John Legend and Chrissy Teigen star in "Stinky Booty Duty 2.0", February 2019	54
Figure 53: #TakeTheTime 5 Dads. 5 Weeks. Dove Men+Care, May 2019.....	54
Connecting with Millennial Values	55
Brands are a part of the Millennial identity	55
Figure 54: "The brands I use reinforce the image I want to portray" (% any agree), by generation, June 2019.....	55
Figure 55: Millennial attitudes toward brands representing values, June 2019	55
Millennials expect companies to walk their talk.....	56
Figure 56: Millennial ranking of best ways for brands to represent their values, June 2019	56
Figure 57: Millennial ranking of the most important values Canadians should have, June 2019	57
APPENDIX	58
Data Sources and Abbreviations	59
Data sources	59
Figure 58: Generational perspectives, June 2019	60
RESEARCH METHODOLOGY	61
Canada Research Methodology	62
Consumer research.....	62
Sampling	62
Statistical Forecasting	64
The Mintel fan chart.....	65

OVERVIEW



What you need to know

At 25-42, most Millennials have aged out of the stereotypical early 20's lazy and entitled image that has defined them for so long. Millennials are financially minded and transitioning into adulthood with more than half now responsible for others as spouses and parents. The transition into adulthood is leaving the generation to feel the weight of their responsibilities creating a true need to cater to the label of 'The Convenience Generation'. Millennials see brands as an extension of themselves, making them more attentive to ethical and environmental actions taken by brands. Marketers need to be clear about the exact segment of Millennial they are targeting given that this generation is transitioning through major lifestyle mile markers (eg childbirth) and spending priorities will vary accordingly.

This Report explores where the generation is at currently in terms of lifestyle, how the generation sees their current lifestyle, their worries, how they most enjoy spending their time, the impact tech is having on interactions, their values and their relationship with brands.

Definitions

Millennials: the generation born between 1977 and 1994. In 2019, Millennials are between the ages of 25 and 42.

When split into two groups, Millennials are defined as:

Younger Millennials: Millennials born between 1987 and 1994. In 2019, Younger Millennials are between the ages of 25 and 32.

Older Millennials: Millennials born between 1977 and 1986. In 2019, Older Millennials are between the ages of 33 and 42.

EXECUTIVE SUMMARY



The issues

Millennials are responsible and feeling the burden of responsibility

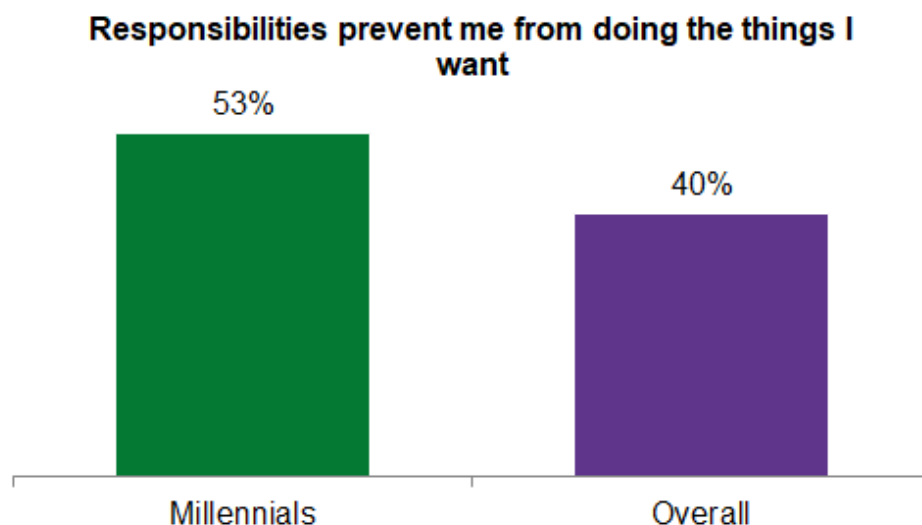
At age 25-42, the generation is aging out of the proverbial 18-34 age range that has defined them for so long. Bucking the stereotypical image of the mid-20s lazy individual, the generation is 'adulting', being the most likely to be working full time (69%) and responsible for others (58% are married and 47% have children under the age of 18 at home). The combination of these demographics leads them to be more likely to feel that responsibilities keep them from doing what they want than older generations (see Perception of Current Lifestage) and makes them the most time-crunched (see *Canadian Lifestyles: The Cost of Convenience – Canada, April 2019*). As such, the need for convenience is real and companies will benefit by catering to the fact that they are commonly termed: 'The Convenience Generation'.

The struggle is real: experiences vs finances – don't shame them for lifestyle choices

Contrary to popular portrayals of Millennials as wasting money on avocado toast or wasting away their money by buying lattes (see What's Not Working), the generation is financially minded and on their way to attaining financial stability (see Today's Millennial Lifestage). In fact, nearly half (46%) have surmounted the milestone of home/condo ownership. Having said this, the label 'The Experiential Generation' is also accurate as 59% of Millennials would rather spend on experiences than on things (see What's Working?). Today's consumers, particularly younger ones, face more social pressure to 'live your best life' and 'have it all' thanks, in part, to social media (see The Impact of Tech on Interactions). All this is to say they are financially minded but may be struggling to balance spending on enjoyment now (ie experiences) against their desire to achieve future financial goals. As such, the generation will likely be drawn to companies that promote a give-take or trade-off model that allows room for 'success' on their terms.

FIGURE 1: "RESPONSIBILITIES PREVENT ME FROM DOING THE THINGS I WANT" (% ANY AGREE), MILLENNIALS VS OVERALL, JUNE 2019

"How much do you agree or disagree with the following statements?"

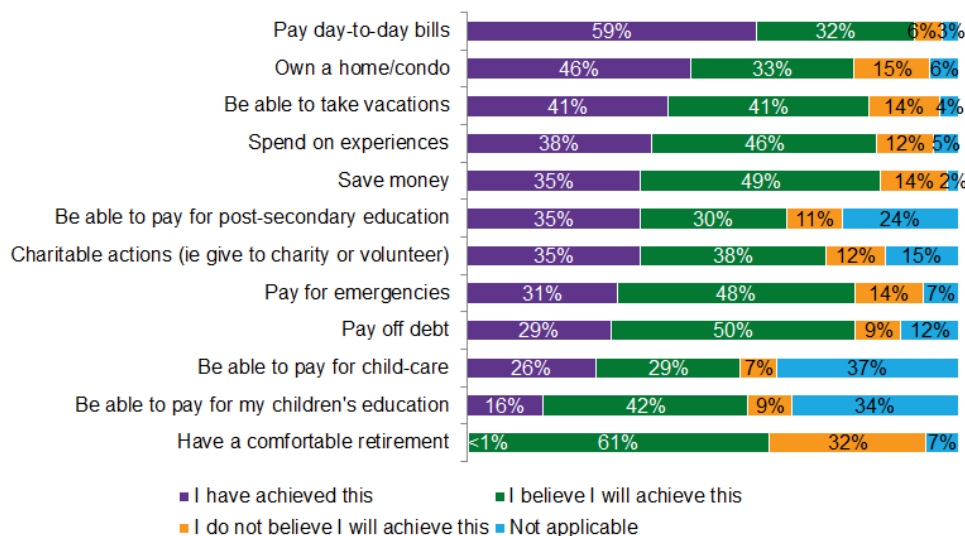


Base: 2,000 internet users aged 18+

Source: Lightspeed/Mintel

FIGURE 2: ACHIEVEMENT OF FINANCIAL GOALS, JUNE 2019

"Which of the following financial priorities have you already achieved, do you believe you will achieve, or do you not believe you will not achieve?"



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

The relationship with brands is more personal for Millennials than older generations

Millennials differ from older generations in that they see brands as an outward expression of who they are. Not only does this mean that younger generations will be more attentive to whether or not brands represent their personal values (see Connecting with Millennial Values), this also highlights that young adults will be shopping with these values in mind. As such, brands need to be clear about their moral or ethical stance on issues and stand to gain by clearly communicating how they are supporting these positions. Importantly, Millennials are keen to see companies do more than just create marketing campaigns or donate to causes they care about. There is an expectation that companies will action change from within on key issues of fair treatment of employees and environmental issues.

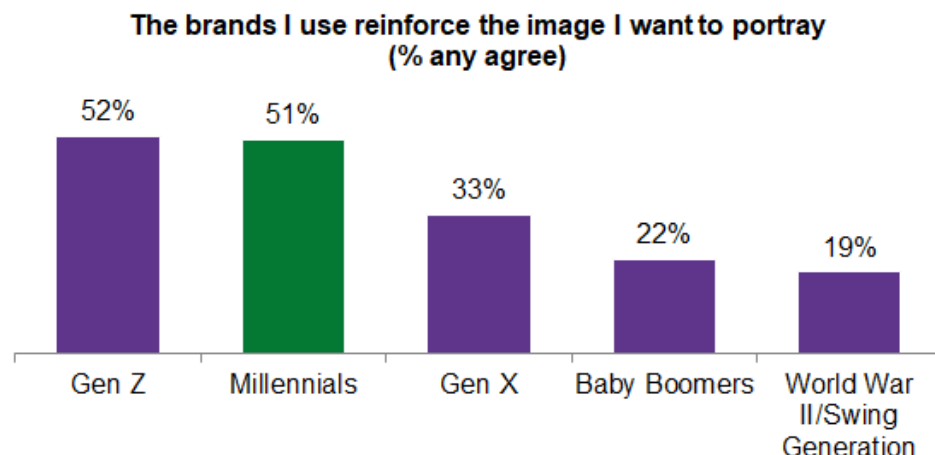
Opportunities

Be mindful that this generation is literally in transition

The age range of 25-42 is a critical one as it often houses two major lifestyle markers: first marriage and becoming a parent (see Market Factors) meaning that Millennials are truly in a transitional point in life. Marketers need to be clear which sub-segment of the generation (ie single vs married, parent vs non-parent) they are interested in targeting as priorities and interests will vary accordingly. The contrast is particularly stark when looking at how the sub-segments enjoy spending time. For example, where family time is of utmost importance to Millennial mothers, catering to a grown-up version of a 'girls night in' will resonate more strongly with Millennial women who are not parents and are more focused on their own interests like watching their favourite movies/shows (see Favourite Activities).

FIGURE 3: "THE BRANDS I USE REINFORCE THE IMAGE I WANT TO PORTRAY" (% ANY AGREE), BY GENERATION, JUNE 2019

"How much do you agree or disagree with the following statements?"

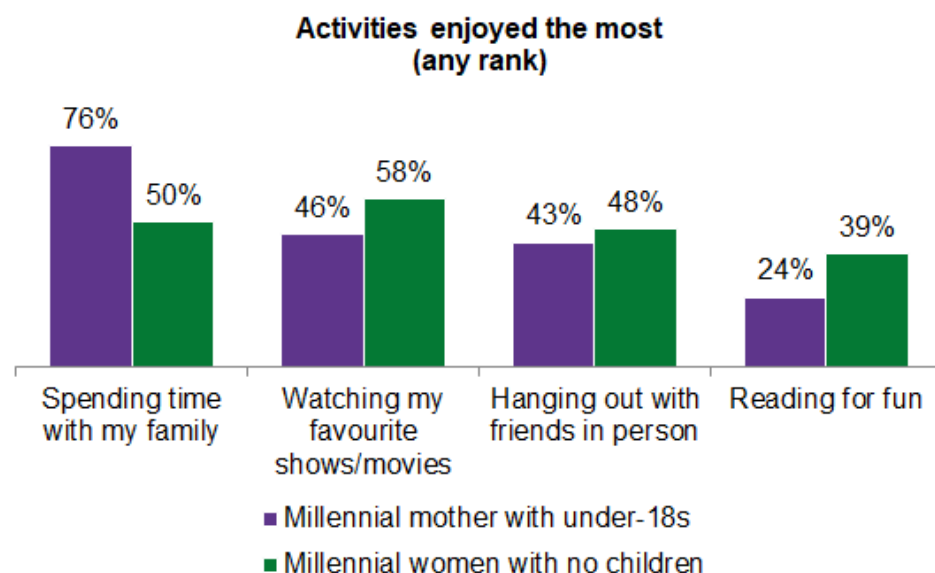


Base: 2,000 internet users aged 18+

Source: Lightspeed/Mintel

FIGURE 4: SELECTED ACTIVITIES ENJOYED THE MOST (ANY RANK), MILLENNIAL MOTHERS WITH UNDER-18S AT HOME VS MILLENNIAL WOMEN WHO DO NOT HAVE CHILDREN, JUNE 2019

"Which of the following activities do you enjoy the most? Please select and rank up to three responses, with 1 being your favourite."



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

Millennial parents aren't growing out of their desire for experiences

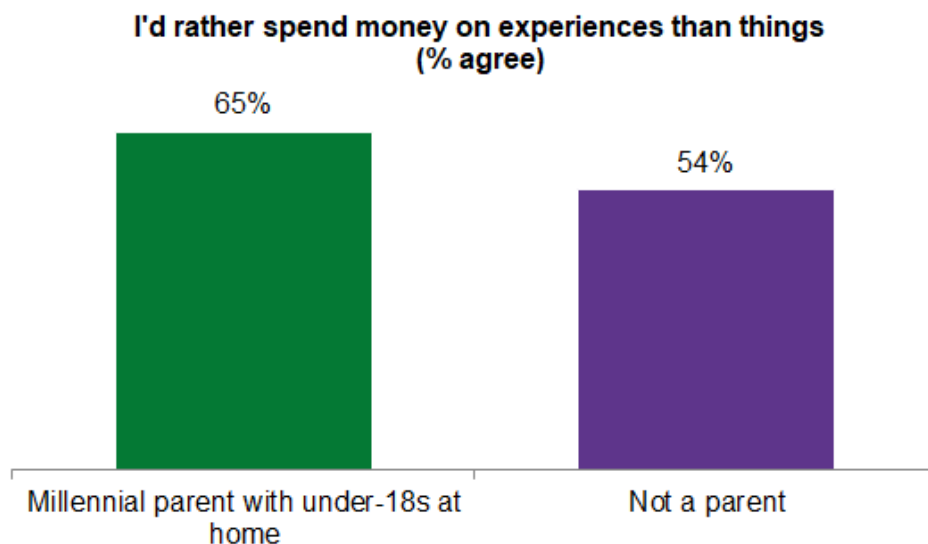
The fact that some 37% of Millennials have children between the ages of 6 and 17 at home (skewing up to 56% of older Millennials) emphasizes the fact that the generation is growing up. With kids at home (and tweens and teens, in particular), the challenges of managing family relationships is unsurprisingly a stressor for this segment (see Millennial Worries). Interestingly, Millennial parents are even more interested in spending on experiences as they look for activities that will appeal to the whole family. This is a boon for leisure/entertainment companies or retailers investing in experiential elements as experiences can be shared and hold the potential to create lasting memories for the whole family. The stereotypical image of the 20-something avocado toast-eating Millennial needs to move over for the Millennial family standing at a pop-up shop posing for a selfie with their avocado toasts.

Millennial parents under more pressure, Millennial dads struggling to adjust

It must be acknowledged that parenting today for Millennials looks quite different to the generations that came before them in at least two ways. Shifting household structures to dual income households means a movement (or aspiration) towards more equality in the division of household labour. At the same time, reliance on social media means that Millennial parents are exposed to a wider variety of viewpoints on right/wrong ways to parent than ever before. With Millennial parents driving the sentiment that social media posts reflect their real selves (60% vs 43% non-parents, see Databook). Millennial dads are feeling that they are getting the short end of the stick. Once commonly portrayed as the joker of the household, the pendulum has swung the other way thanks, in part, to recent changes in parental leave policies. While the shift in media portrayals of dad has been a positive one, the bar may feel unrealistic meaning that Millennial dads would benefit from greater conversations about what it means to be a father in today's environment.

FIGURE 5: "I'D RATHER SPEND MONEY ON EXPERIENCES THAN THINGS" (% ANY AGREE), MILLENNIAL PARENTS WITH UNDER-18S AT HOME VS THOSE WHO ARE NOT A PARENT, JUNE 2019

"How much do you agree or disagree with the following statements?"

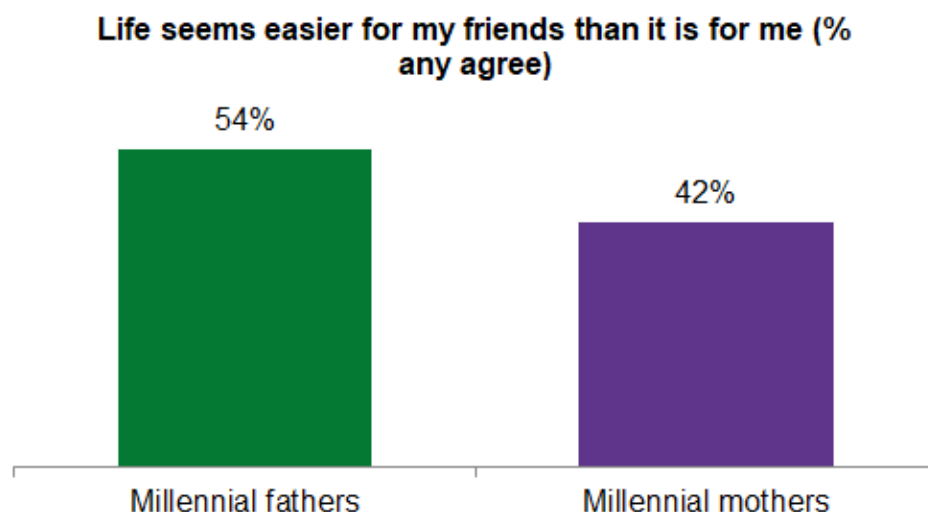


Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

FIGURE 6: "LIFE SEEMS EASIER FOR MY FRIENDS THAN FOR ME" (% ANY AGREE), MILLENNIAL FATHERS VS MILLENNIAL MOTHERS, JUNE 2019

"How much do you agree or disagree with the following statements?"



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

What it means

Companies would do well to stop waiting for Millennials to 'grow up' and into more 'traditional' ways of living. Instead, the hobbies and interests of Millennials today like playing video games and spending

on experiences (rather than on stuff) are here to stay – in fact, these will form the basis of what adulthood will look like in years to come. Rather than shaming them for lifestyle choices they're making now, businesses are better off encouraging them to make meaningful trade-offs to achieve a

balance between living the best life now vs striving towards attaining financial goals. Support in this way will win their attention as Millennials today want both – now and as they 'grow up'.

THE MARKET



What You Need to Know



Major life markers fall within the Millennial age definition

Defined as those currently between the ages for 25-42, the Millennial generation often houses two major lifestage markers: marriage and becoming a parent, leaving half of the generation being parents (49%) and half who are not (51%). This means that, as a segment, Millennials are truly in a transitional point in life. Marketers need to be clear which sub-segment of the generation (ie single vs married, parent vs non-parent) they are interested in targeting as priorities and interests will vary accordingly. To this end, it is important to note that half of the Millennial generation has now aged beyond the proverbial 18-34-year-old age bracket that has defined them for so long, meaning that they will likely be shopping with the needs of their families and children in mind.

Millennial moms grew up with working moms

According to Statistics Canada, the proportion of dual income households has been on the rise over the past 40 years. The increase in female employment rates has led to notable changes in the employment structure of families, particularly throughout the 1980s and 1990s – right around the time that Millennials were born. As Millennial women likely grew up with working moms,

their definition of 'success' as a mom likely includes working while keeping up with household chores, however it is distributed between them and their partner. With Millennial moms looking after the needs of others at the cost of looking after themselves (see Millennial Worries), companies will likely see gains by providing avenues that give Millennial moms 'permission' to take a little bit of time for themselves.

Millennials are more ethnically diverse

Canada's population growth has been primarily driven by immigration, accounting for two thirds of its population growth leading to a more ethnically diverse population than ever before. Indeed, the demographic breakdown from this Report reflects that Millennials self-identify as being more ethnically diverse than older generations. While the expansion of ethnically focused retail concepts and a growing range of products and flavour profiles are a step in the right direction catering to the needs of growing population segments, brands would do well to consider the ways in which it demonstrates commitment to inclusivity to Canadian consumers. This is a strategy that will be more important to Millennials not only because they are more ethnically diverse but also because they are more likely to choose brands that reflect their values (see Connecting with Millennial Values).

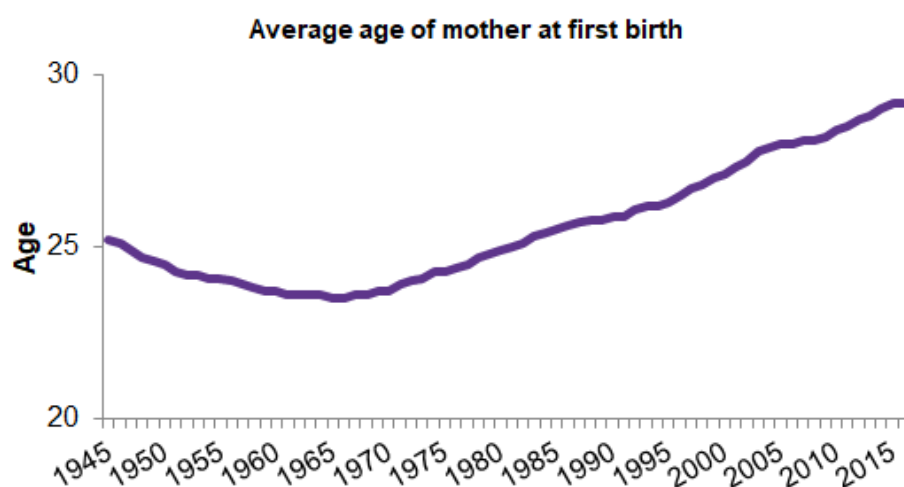
Market Factors

Millennials are at a true transition point

According to Statistics Canada, the average age of mothers at childbirth has been over the age of 30 since 2010. One factor that helps explain this is the fact that the average age of mothers for when they have their first child has been steadily on the rise since the mid-1960s. The agency reported that the average age of mothers at first birth was 24.9 in 1980 and has climbed up to 29.2 in 2016. This makes the Millennial generation different than Boomers in that by the time Baby Boomers had reached the age range defining the Millennial generation (25-42), most were already parents. In contrast, Millennials are split evenly between those who are parents (49%) and those who are not (51%). This indicates that Millennials are truly in a transitional lifestage.

From a marketing perspective, this means that companies need to have a clear definition of the specific subgroup of Millennial they are interested in targeting as shopping priorities and lifestyles will vary to a greater degree for Millennials than for other generations. For example, the shopping priorities and lifestyle of a 33-year-old uncoupled childless consumer is likely to differ quite significantly from one that is married with two children in the household.

FIGURE 7: AVERAGE AGE OF MOTHER AT FIRST BIRTH, 1945-2016



Source: Statistics Canada/Mintel

Millennials make up a quarter of the population, and are growing up

At just over nine million strong, Millennials represent a quarter of the Canadian population making them an intuitively important segment to cater to. With regards to targeting the generation, companies would do well to be mindful that the segment is aging out of the proverbial 18-34-year-old age bracket that has defined them for so long. Specifically, over half of

the Millennial generation (or 14% of the total Canadian population) are now aged 33-42 and taking on more 'adult' responsibilities like getting married, having children and getting a mortgage (see Today's Millennial Lifestage). Even the other half (or 11% of the total Canadian population) of the generation skews towards the latter end of the proverbial range at ages 25-32, meaning that most have graduated from university and are settling into their careers (per the aforementioned section).

All told, marketing efforts need to be reflective that the Millennial lifestage is one that is aging out of the stereotypical image. To this end, marketers may find it more helpful to target the segment by age groups. Younger Millennials, or 25-32s, are less likely to be married or have children making them less likely responsible for others, which leave them more focused on themselves and their own needs. In contrast, Older Millennials, or 33-42s, are more likely to be shopping with the needs of their children and families in mind.

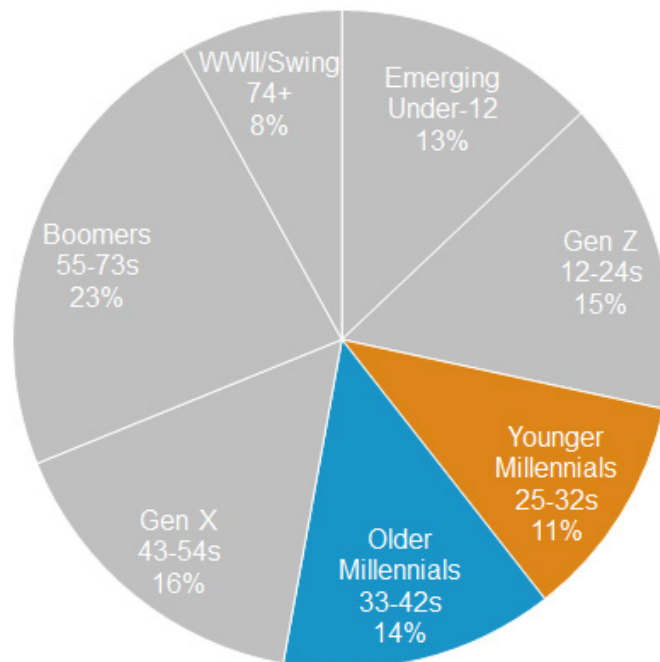
More employed moms than before, more pressure on Millennial moms

As reported by Statistics Canada in May 2016, women are increasingly joining the workforce meaning that households with two working parents have been on the rise. According to the agency, the number of Canadian families with two employed parents has almost doubled in the last 40 years; from 1.0 million to 1.9 million families, from 1976 to 2015. Over that same period, the proportion of families where just one parent earned a paycheck fell by more than half, dropping from 59% to 27%.

More women entering workplace just as Millennials were born

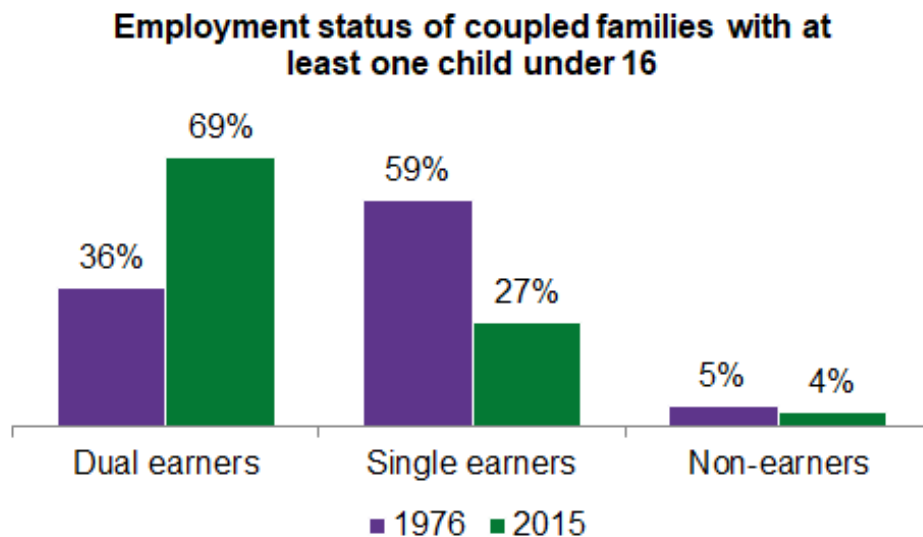
Statistics Canada goes on to report that much of the impetus behind the change was spurred by the increasing participation of women in the workforce. From 1976 to 2015, women's employment rate increased from 47% to 69%. The increase in female employment rates has led to notable changes in the employment structure of families, particularly throughout the 1980s and 1990s – this is right around the time that Millennials were born (recall Mintel defines Millennials as being born between 1977 and 1994). In other words, Millennials were born right around the time that women were starting to increase participation in the workplace.

FIGURE 8: CANADIAN POPULATION, BY AGE GROUP, 2018



Source: Statistics Canada/Mintel

FIGURE 9: EMPLOYMENT STATUS OF COUPLE FAMILIES WITH AT LEAST ONE CHILD AGED UNDER 16, MAY 2016



Source: Statistics Canada/Mintel

The pressure is on for Millennial moms

Notably, as this was a transitional period, it was likely that Millennial women likely saw their moms in the workplace but with a household division of labour that still skewed heavily towards women doing the majority of the housework (much more so than today). With Millennial women seeing their moms pulling the double duty of earning a paycheque and then coming home and cooking dinner, it is little wonder that Millennial moms are more stressed about keeping up with all their responsibilities as well as trying to keep everyone happy (see Millennial Worries).

As discussed in the aforementioned section, Millennial moms have more pressure on them than generations of moms before them thanks to the combination of seeing their moms do it all and also to achieve 'success' as shown in

various forms of media today. Marketers need to be mindful that Millennial moms are trying to do it all at the cost of looking after their own needs and feeling guilty when they do take time for themselves. To this end, Millennial moms could benefit from more conversations about feeling the pressure to do it all and also give themselves more 'permission' to take a little bit of time for themselves.

Millennials are more ethnically diverse than older generations

Canada's population growth has been primarily driven by immigration, accounting for two thirds of its population growth. According to Statistics Canada, Canada had over 1.2 million new immigrants who had permanently settled in Canada from 2011 to 2016, representing 3.5% of Canada's total population in 2016. The agency reports that the proportion of Canadians who are foreign-born and came to Canada through

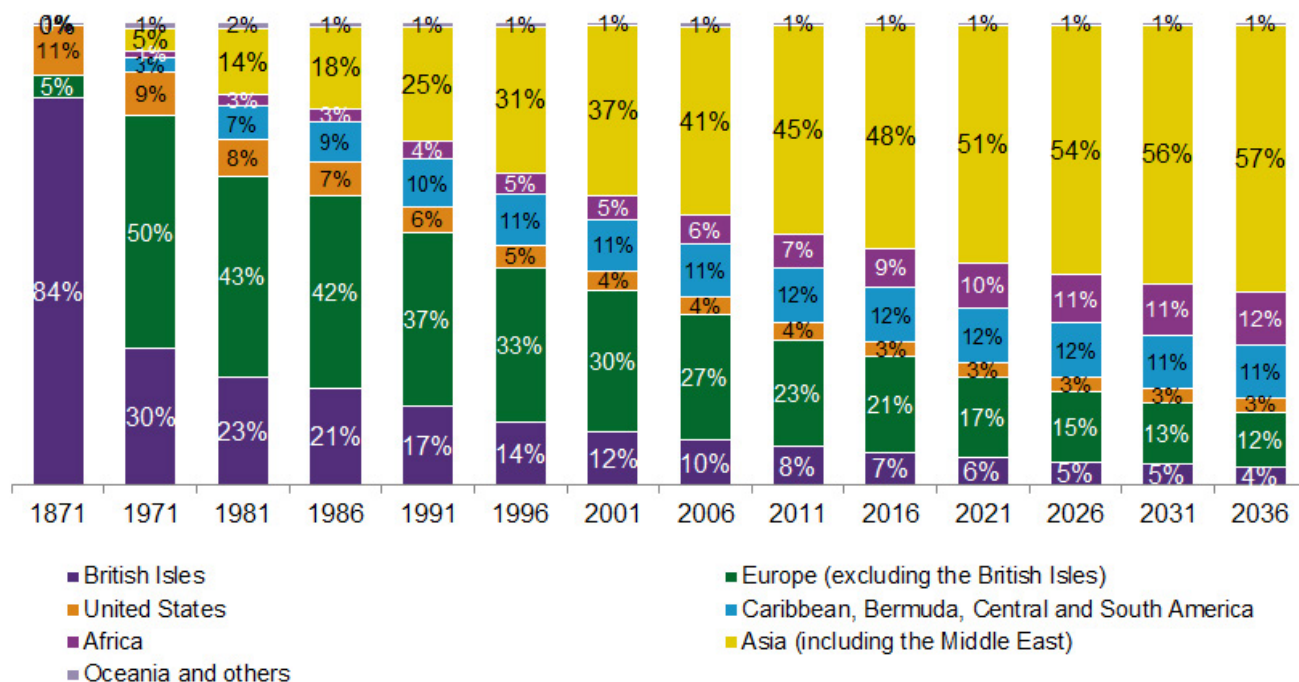
the immigration process has been steadily on the rise; from 14.7% in 1951 to 16.1% in 1991 to over one

fifth (21.9%) of the population in 2016. The trend of immigration driving Canada's population growth is predicted to continue leading the foreign-born population to reach an estimated 24.5-30.0% by 2036.

Inclusivity must be a consideration in marketing campaigns

The influx of immigrants means that the face of the nation is literally changing, housing a more ethnically diverse population than ever before. According to Statistics Canada, almost half (48.1%) of the foreign-born population was born in Asia while a lower proportion (27.7%) was born in Europe. Indeed, the demographic breakdown from this Report reflects that Millennials self-identify as being more ethnically diverse than older generations.

FIGURE 10: DISTRIBUTION OF FOREIGN-BORN POPULATION IN CANADA, BY REGION OF BIRTH, 1871 TO 2036

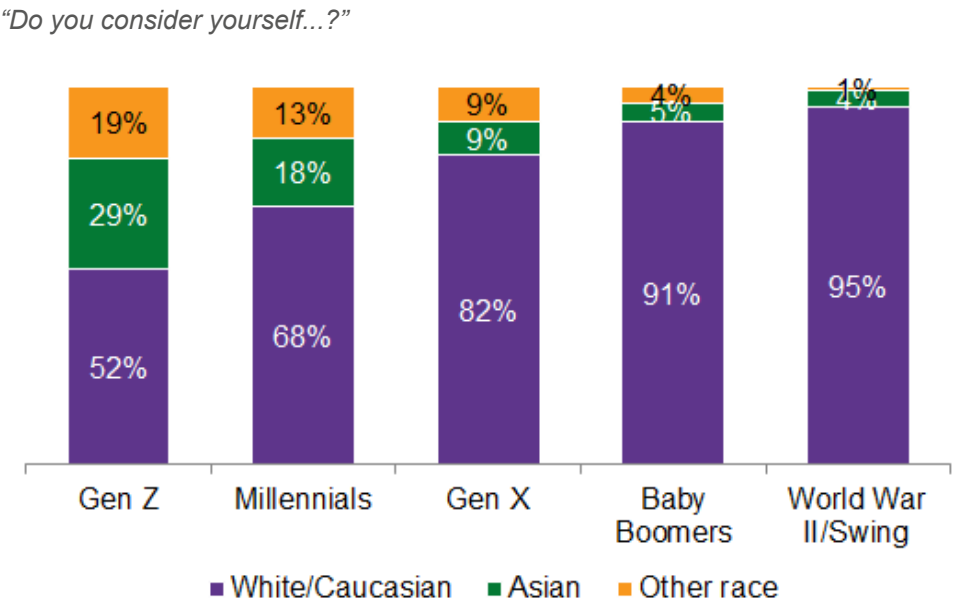


Source: Statistics Canada/Mintel

Since the early 1970s, multiculturalism policies had dubbed Canada as a mosaic of cultures. As younger consumers are today's face of the nation, the way Canadians think of "mainstream" Canada is also shifting; over half (52%) of Canadians, skewing up to 60% of 18-34-year-olds, cite diversity as one of the top five most important values that defines the country (see *Canadian Lifestyles: Redefining the Mainstream – Canada, April 2018*).

While the expansion of ethnically focused retail concepts and a growing range of products and flavour profiles are a step in the right direction catering to the needs of growing population segments, brands would do well to consider the ways in which they demonstrate commitment to inclusivity to Canadian consumers. In particular, companies interested in catering to younger audiences will benefit from going beyond mere physical representation of segments and demonstrating a true interest in their cultural aspects. Cues such as adopting celebratory occasions from other cultures such as Chinese New Year and leveraging them as a marketing platform is a subtle way for brands to show consumers that they embrace diversity.

FIGURE 11: SELF-IDENTIFICATION OF ETHNICITY, BY GENERATION, JUNE 2019



Base: 2,000 internet users aged 18+
Source: Lightspeed /Mintel

KEY PLAYERS



What You Need to Know



Industries are gaining from blurring adulthood/childhood lines

It is commonly touted that younger generations are pushing back traditional milestones of getting married, having children or buying a home. While it is true that being an adult now follows a less linear path towards achieving said milestones, leisure and entertainment companies that are blurring the lines between adulthood and childhood are benefiting from the blurring lines and generating gains. Some examples include movie franchises that work well to appeal to both parents and their children or video games which are seen to be a fun and enjoyable for kids and adults alike.

The experiential generation makes shopping more interesting

Sometimes touted as The Experience Generation, Millennial interest in spending on experiences over things is pushing businesses to find ways to make their shopping experiences and marketing efforts more engaging and interactive for consumers – ie the rise of experiential retailing. From the ability to stream appropriately themed music while at a food market to retailers creating campaigns that are more interactive, shopping experiences and marketing efforts are engaging consumers on a number of levels and Millennials are coming back for more.

Tech is opening hearts and minds and companies are responding

Younger consumers today are open about sharing their personal lives, leading to a growing comfort in talking about all types of issues publicly, including the managing of health and wellness issues. Mental health is an area that has gained much traction and the marketplace is responding. This is seen with more brands providing tools to help consumers manage wellness from a multitude of angles.

Lifestyle shaming is unproductive and masks bigger issues

From avocado toast to lattes, Millennial spending habits have caught the attention of the public eye leading to notable financial personalities calling out their lifestyle choices as the reason the generation is failing to save money and buy homes. While it is true that the advice dispensed from financial advisors is objectively sound, blaming Millennial lifestyle choices for their perceived lack of financial success downplays the impact of societal changes as well as fails to ignore the fact that younger generations today are striving to balance happiness/enjoyment now as well as success in the future.

What's Trending?

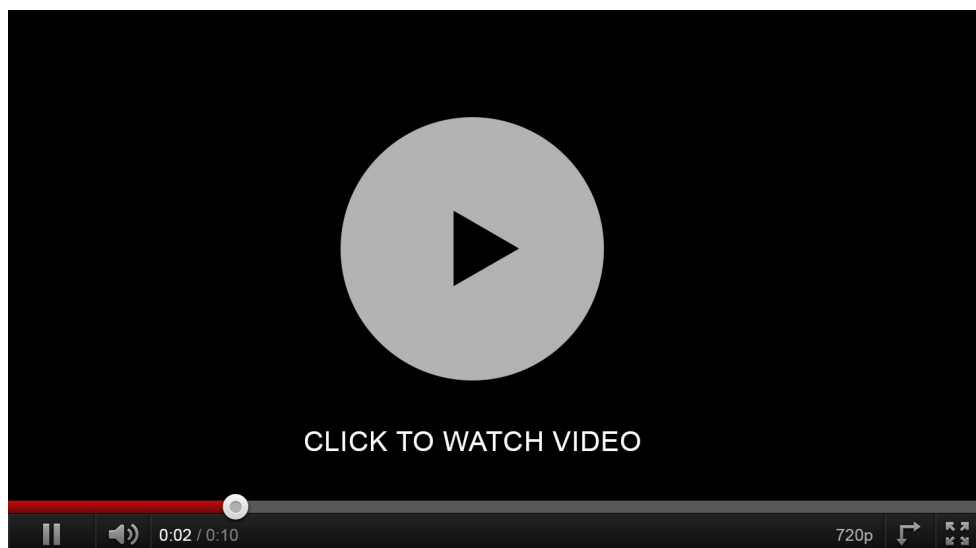
Spotlight on challenging what 'adulthood' looks like

Mintel Trend, *Redefining Adulthood* discusses the concept that the elements that define an adult today have changed significantly leading people to adapt to lives that don't fit a traditional mold. Where being an adult once had a pretty standard ladder of growing up, getting a job, starting a family, today's consumers live a life where the concepts still exist, though the path taken is less linear. With traditional lifestages blurring, what makes someone 'an adult' is less clear-cut than it once was.

Leisure and entertainment companies cater to blurring lines and seeing success

The blurring boundaries of 'adult' vs 'child' interests are easily seen in the leisure/entertainment space where more products or offerings are designed to draw in both older and younger audiences at the same time. Disney movie remakes like *The Lion King* (most current to the time of writing) exemplify this and will likely tap into a sense of nostalgia for Older Millennials with the movie's very first release in 1994. At the same time, it will also appeal to Older Millennials as they can now share the movie with their children – keeping in mind that some 45% of older Millennials are now the parents of 6-17s. The opening weekend of *The Lion King* surpassed expectations and grossed \$185 million USD in North America

FIGURE 12: PLAY GREAT GAMES TOGETHER – NINTENDO SWITCH, MAY 2018



Source: YouTube – Nintendo /Mintel

which represented the best domestic opening of any Disney remake and the biggest domestic opening for a PG movie, according to *Vanity Fair*. Beyond just the movie title itself, the content of this and many movies in the marketplace today are designing content (ie storylines and jokes) with both younger and older audiences in mind.

Video games are also seeing traction amongst both younger and older audiences where once gaming was an activity deemed more for children or teens. Results from Mintel's *Attitudes Toward Gaming* –

Canada, February 2019 Report showed that some 82% of Millennials play video games and that some 53% make time in their day to play these games. Moreover, a third (34%) of Millennial men rank playing video games as an activity they most enjoy. A good example of a company tapping into the blurred line of who enjoys playing video games was seen with the Nintendo Switch. Upon its release, the company smartly created a campaign which showed a device being enjoyed by an entire family while on vacation.

Spotlight on Millennials as 'The Experience Generation'

It is commonly touted that Millennials are 'The Experience Generation'. Indeed, results from this Report reflect that most Millennials (59%) would rather spend money on experiences over things. Of course, it needs to be acknowledged that this is not just a Millennial trend in that all generations seem to be moving in this direction, however it is the two younger generations that are driving this sentiment.

The rise in experiential elements across all consumer areas reflects that companies are doing more to feed into consumer desire for new and fun experiences. Some fun examples that have been seen in the Canadian marketplace that have done a good job of incorporating experiential elements while tapping into Millennial interests are discussed below.

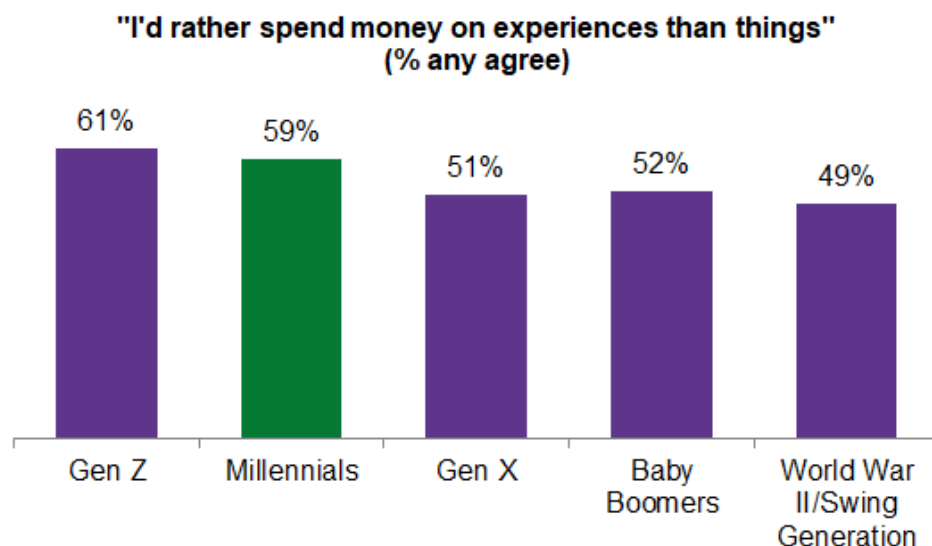
Starring: Market & Co and the 'Food That Sings'

In November 2018, Upper Canada Mall located in Newmarket, Ontario launched an artisanal food market called Market & Co. that included a partnership with Spotify in order to keep shoppers engaged. Using AI to ensure the music stays fresh, shoppers are treated to a series of 20 playlists inspired by the different vendors and eateries located within the marketplace. Using the Spotify app, shoppers scan a Spotify Code (akin to QR codes) affixed to products to call up songs like 'Swim Good' by Frank Ocean when buying seafood at Pier 87 or 'Cold as Ice' by Foreigner when scanning a frozen treat from ice cream shop Sweet Jesus. This marketing collaboration was aptly named 'Food That Sings' project by the Upper Canada Mall.

The addition of music to the shopping experience works well to draw in the attention of younger generations as Gen Z and Millennials both rate movies and music as the top two most important to keep up with (see *Marketing to Millennials – Canada, February 2017*). The first notable retail partnership was seen in 2015 when Starbucks joined forces with Spotify to allow its loyalty program members to influence the music played at its locations; music-based

FIGURE 13: "I'D RATHER SPEND MONEY ON EXPERIENCES THAN THINGS" (% ANY AGREE), BY GENERATION, JUNE 2019

"How much do you agree or disagree with the following statements?"



Base: 2,000 internet users aged 18+

Source: Lightspeed /Mintel

partnerships are certainly not new. However, it is likely that the marketplace is set to see a continued rise of such partnerships moving forward with the likes of restaurants now sharing the playlists on Spotify as a form of 'free' merchandise to engage their patrons.

Starring: IKEA

Swedish furniture company IKEA has done a good job in making their marketing campaigns more experiential over the past year or so.

In January 2018, the company created a print campaign geared towards helping expecting moms prepare for their new lifestyle. The print ad contained chemicals similar to that of a pregnancy test and designated an area for moms-to-be to urinate on. If they were pregnant, the paper would reveal a special price on a baby crib. Consumers looking to make good on the 'IKEA family discount' would then bring the paper in to the store (the layout was designed so that the discount showed near the middle of the page and area where the urine would go was near the bottom of the page so it could be easily cut off without removing the discount). This campaign

added a level of interaction that made it more personal to those who were actively going through the transitional point of having a baby – a lifestyle that tends to fall within the Millennial years (per above).

This effort was followed up in February 2019 when the company hosted a 'sleepover' event across 11 locations in Canada. While the event was designed as a way to introduce consumers to the brand's sleep products, the family-friendly event also included key elements that directly addressed wellness including yoga and consultation with a sleep coach. As discussed below, wellness is an area that is top of mind for Millennials, being known as 'The Wellness Generation'.

Spotlight on Millennials as 'The Wellness Generation' or 'Generation Health'

Therapy or the Wellness generation is another label that gets applied to Millennials. A quick scan of the marketplace shows that wellness, mental health in particular, has never been in the spotlight like it is today. Examples are rampant and range from Millennial celebrities like Demi Lovato and Lady Gaga discussing their struggles with

depression, to the likes of *BuzzFeed News* publishing an article stating that burnout has become a baseline mentality for Millennials today.

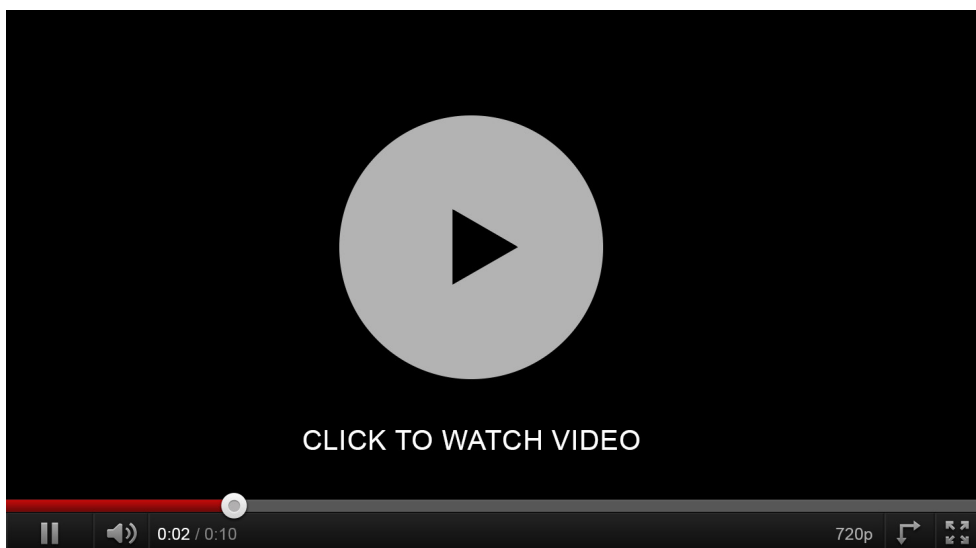
The increasing attention towards one's wellness likely stems, in part, from the fact that younger consumers are sharing all aspects of their lives on social media. Indeed, results from this Report reflect this in that Gen Z and Millennials alike are driving the sentiment that what they post on social media reflects who they really are (see *The Impact of Tech on Interactions*), which may also include issues they face and how they are handling them. As discussed in *Wall Street Journal's* 'Millennials Are the Therapy Generation' article, consumers in their 20s and 30s are wearing their heart on their sleeves and sharing all aspects of their lives – including going to therapy and counselling.

Starring: Bell Canada and Headspace x NBA on mental health

With consumers being more open about these issues, companies are also doing their part to join in on the conversation. A longstanding staple in this regard is seen with Bell Canada's Let's Talk Day campaign which has been running since 2010 and was designed to raise awareness of mental health issues by donating five cents for every qualifying text, call, tweet, Instagram post, Facebook video view and Snapchat geofilter made by customers on the pre-designated 'Let's Talk Day'. The campaign has seen increasing participation from consumers each year. According to the company's website (at the time of writing), the campaign has raised over \$100 million CAD with a total number of over 1 billion interactions since 2011.

Outside of this, companies across a broad range of categories are also finding interesting ways to participate in the wellness conversation. For example, the NBA (National Basketball Association)

FIGURE 14: #EATTOGETHER 2017, DECEMBER 2016



Source: YouTube – President's Choice/Mintel

partnered with meditation app, Headspace, to provide Canadians with a free month membership in January 2019 as a way to encourage dialogue amongst consumers about mental wellness. These efforts are resonating strongly with Millennials as they as they are amongst the most likely to be dealing with mental health issues (see *Healthy Lifestyles – Canada, June 2019*).

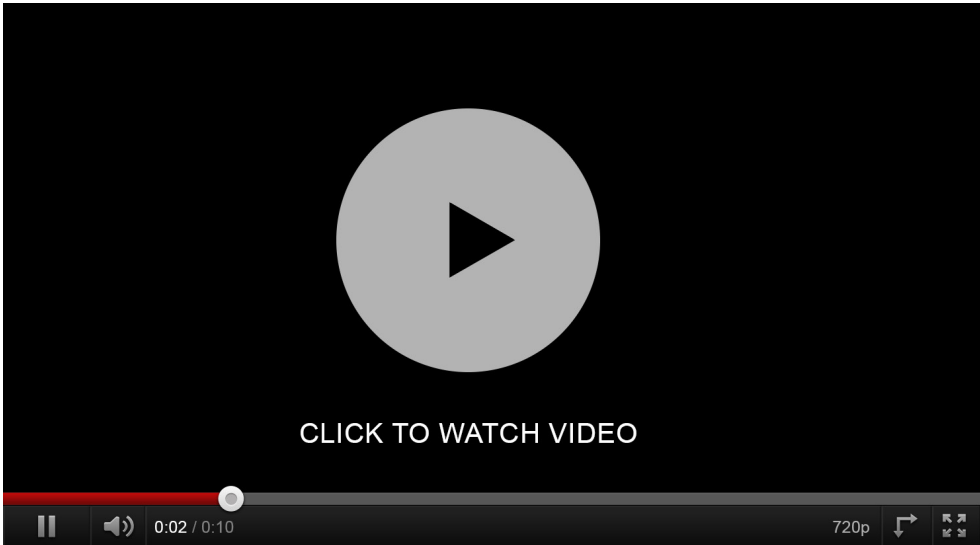
Starring: President's Choice on social bonding

Mintel Trend, *Social Isolation*, discusses how loneliness is coming into focus as people are increasingly reliant on digital communications. For Gen Z and Millennials, their heavily reliance on social media and putting their 'real selves' on display is creating an environment where consumers are comparing themselves to each other and in some cases, making them feel left out and lonely (see *The Impact of Tech on Interactions*) – ie there is an impact on their emotional wellness. Combined with the importance that Millennials place on in-person time with family and friends (see *Favourite Activities*), companies that place

an emphasis on addressing one's emotional wellness are likely to strike a personal chord with the Millennial segment. In this regard, social bonding has become more prevalent in marketing campaigns.

A notable example seen in Canada that has adopted this strategy is seen with grocery retailer Loblaw's private label brand, PC (President's Choice). Since the end of 2016, the company has taken a step back from featuring its products in its ads to showcasing how enjoying food together works as a catalyst to bring people together in its 'Eat Together' platform (links below). In its 2017 video, the ad featured a woman in an apartment building lamenting the disconnection resulting from people's dedication to their devices, so she sets up a dinner table in her apartment building's hallway, inviting her neighbours to join in on the food celebration. Its 2019 video shows people striving to live life at the fullest through mountain climbing, travelling, attending concerts and other activities, but ends with the realization that the greatest moments are those that take place around the dinner table.

FIGURE 15: #EATTOGETHER 2019, DECEMBER 2018



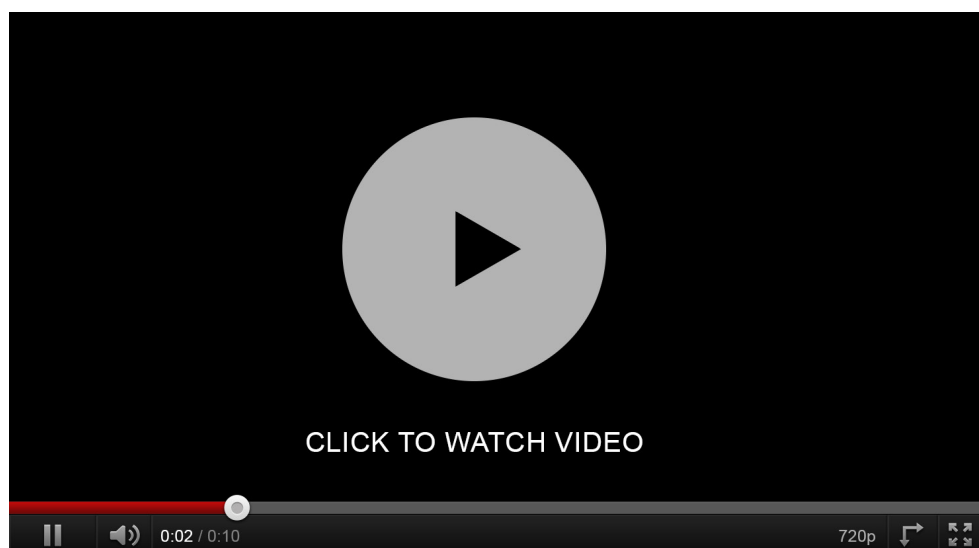
Source: YouTube – President's Choice/Mintel

What's Not Working?

Lifestyle shaming

From avocado toast to lattes, Millennial spending habits have caught the attention of the public eye leading notable financial personalities to call out their lifestyle choices as the reason the generation is failing to save money and buy homes. Some notable examples include real estate mogul, Tim Gurner, saying that young people would be able to buy homes if they ate out less, travelled less and stopped spending their money on “smashed avocado for \$19 and four coffees at \$4 each” in May 2017. More recently, notable financial expert, Suze Orman, stated that Millennials are “peeing \$1 million down the drain” by buying coffee rather than making it at home themselves on the CNBC *Make It* show. Similarly, Chase Bank in the US had released a tweet that shared a similar sentiment in April 2019. The tweet featured a dialogue where a young person asked why their bank account was so low and their bank account responded by saying “make coffee at home, eat the food that’s already in the fridge...” to which the young person’s response was “I guess we’ll never know” and the bank account countering with the word “seriously?”. The tweet was later removed after severe backlash for what was seen as reductive and unsympathetic guidance.

FIGURE 16: SUZE ORMAN: HOW YOUR DAILY COFFEE HABIT IS COSTING YOU \$1 MILLION, MARCH 2019



Source: YouTube – CNBC Make It/Mintel

While admittedly tone deaf to the scores of people struggling to make ends meet, it must be equally accepted that the advice dispensed is objectively sound financial advice in that small amounts of money invested will grow through decades of compounded interest. However, blaming Millennial lifestyle choices for their perceived lack of financial success (which

does not hold true for many of the segment, see *Today's Millennial Lifestage*) may also downplay the impact of societal changes like the cost of housing, education, childcare rising faster than inflation and the growth of wages (see *Canadian Lifestyles: The Cost of Convenience – Canada, April 2019*).

A generation struggling to find the balance

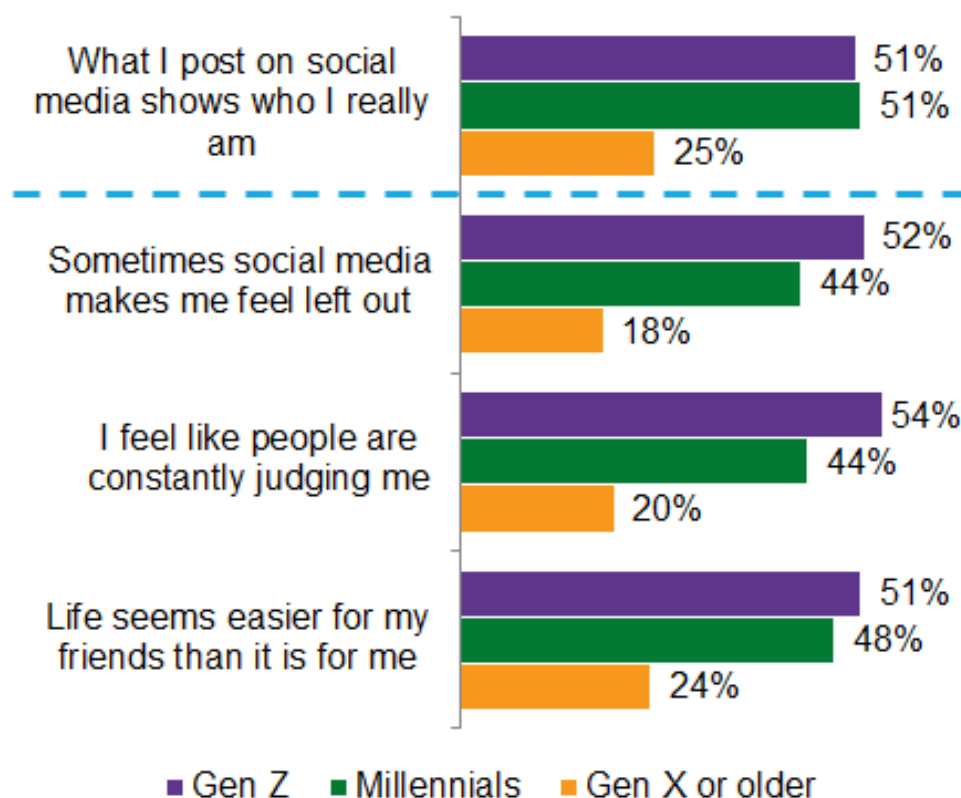
Outside of financial management and economic factors, there is also a social factor at play that is different for Millennials than for generations that have come before: living one's life 'on display' by sharing one's true self online is also creating an environment where consumers are constantly comparing themselves to others. Indeed, results from this Report show that Millennials are more likely than older generations to say what they post on social media reflects who they really are, leaving the generation to also feel more isolated and judged at the same time (see The Impact of Tech on Interactions).

As discussed in the aforementioned section, living life in a highly connected world is creating an environment where there is a constant measuring stick to compare oneself to and in some cases, seeing what others have may also be promoting a greater desire or aspiration to also have it all. While this would have existed for older generations, it may be felt to a stronger degree for Millennials given that practically every day is like one's 10-year high school reunion and the opportunity for direct comparison to one's peers is constantly at one's fingertips.

The impact of increased peer comparisons is having a material impact on younger generations in that they are likely struggling to find the balance between what they see, what they want and what they can realistically afford. An example that illustrates the difficulty in straddling what they want with what can realistically be attained is seen with a rising demand for wedding loans, for example. According to an article published in *The Washington Post* in July 2019, David Green, chief product officer at Earnest, a San Francisco-based online lender, the demand for wedding

FIGURE 17: ATTITUDES TOWARDS THE USAGE OF SOCIAL MEDIA (% ANY AGREE), BY GENERATION, JUNE 2019

"How much do you agree or disagree with the following statements?"



Base: 2,000 internet users aged 18+

Source: Lightspeed/Mintel

loans has quadrupled in the past year. With weddings documented across social media, more couples are often looking to have the extra touches that can come at a cost.

Consider promoting a give-take/trade-off model

All told, financial advisors and companies more generally may see greater success connecting with Millennials (at least in terms of financial management) by finding ways to

promote and support a give-take or trade-off model. Companies need to acknowledge that the Millennial generation is actively working towards meeting future financial goals (see Perception of Current Lifestage) while also wanting to spend on experiences (see What's Trending?), meaning that they are also prioritizing enjoyment in the present moment. Marketing messages, as well as financial tools, need to help Millennials find a better balance between allowing for happiness both right now and in the future.

What's Next?

More avenues to address holistic health thanks to Millennial interests

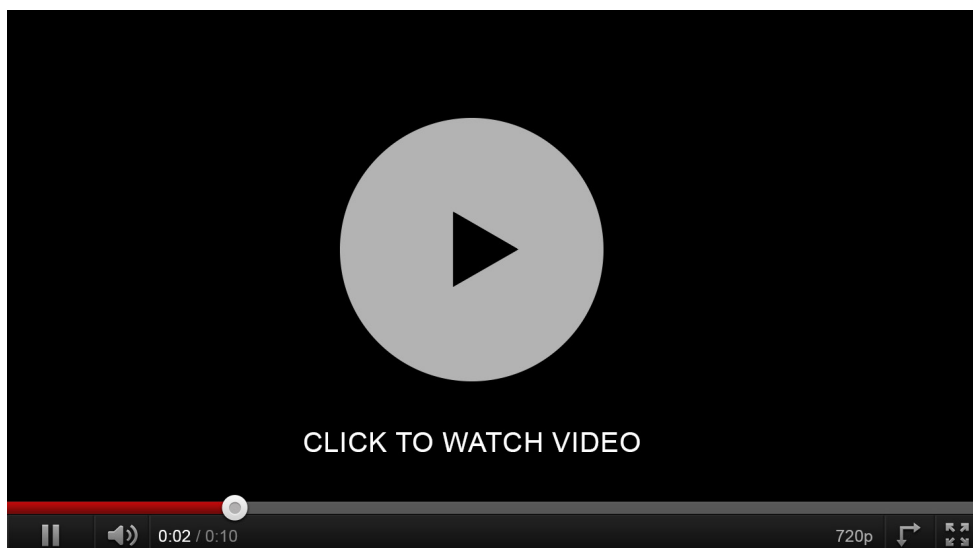
As discussed in the What's Trending? section, Millennials are driving the more holistic approach to health management – ie one that encompasses not only the more traditional elements of physical activity and nutrition but one that also takes into consideration mental and emotional wellness. This is leading to a growing number of companies taking on a wellness angle into their marketing campaigns.

Looking ahead, brands will go beyond mere marketing campaigns and do more to evolve their products so they can help Millennials address health and wellness in ways that are relevant to them and via avenues that appeal to the segment. One key area that Millennials are focused on is getting quality rest. This is seen with half (51%) of Millennials struggling to get enough sleep and a similar proportion (47%) often struggling to find downtime on the days they work (see *Canadian Lifestyles: The Cost of Convenience – Canada, April 2019*).

Spotlight on Pokémon: gaming for a better night's sleep

An interesting example of a company adapting its products to address wellness in a playful way is seen with Nintendo. In July 2019, the company announced that it will be releasing a new Pokémon mobile sleep app that converts a good night's rest into a competition in 2020. As a follow-up to its Pokémon GO Plus device, the Pokémon Sleep app will track the sleep data of users and incorporate the information collected into gameplay. The app will also enable fans to 'catch' the augmented reality characters without using their smartphones.

FIGURE 18: MONEY TALKS STORY #1 – SOPHIA + IMRAN, DECEMBER 2018



Source: YouTube – SoFi/Mintel

This type of development is one that matters to the Millennial segment as playing video games is increasingly becoming an acceptable avenue for fun and stress relief for adults and a favourite activity for a good portion of Millennial men (see Favourite Activities).

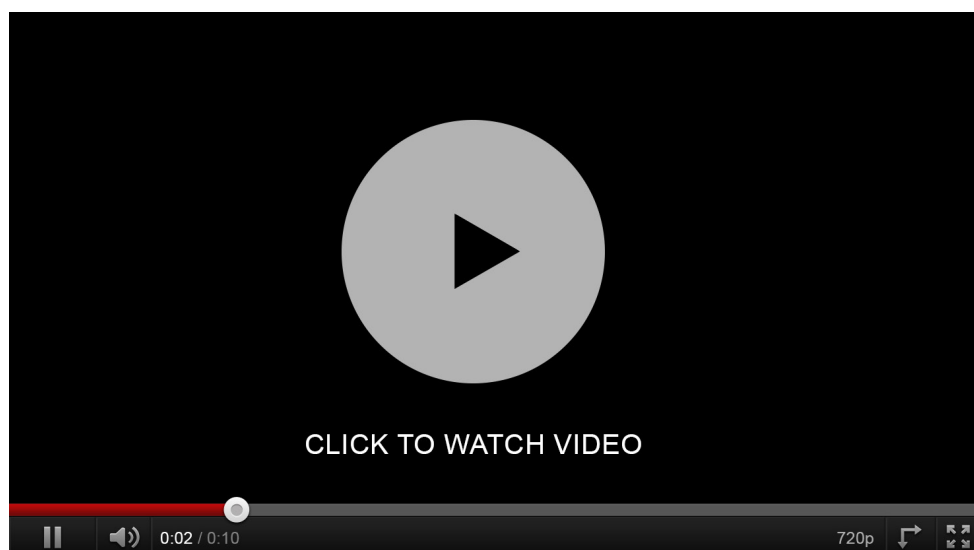
Spotlight on SoFi: acknowledging the emotional toll of debt

Another key area that will likely see more attention is the management of finances as it relates to mental health. Financial matters are top of mind for Millennials; they are much more likely than older generations to be worried about their financial situation (see Millennial Worries), while at the same time are the most likely to be striving towards financial goals (see Perception of Current Lifestage). In this regard, Millennials will be drawn to companies that help them

address the emotional toll that managing finances can take as financial wellness has a direct correlation to mental wellness. Results from Mintel's *Healthy Lifestyles – Canada, June 2019* showed that consumers are more likely to experience stress, anxiety and depression as financial confidence decreases.

In the US, online financial institution, SoFi, created a campaign which featured strangers openly discussing the impact of money on one's life. In the videos below, the strangers are heard talking about their debt, their low points with debt and how it can be isolating and shameful. The company also created a Facebook page which is accessible via the hashtag #moneytalks to allow consumers to have open conversations about their own experiences.

FIGURE 19: MONEY TALKS STORY #2 – ALYSSA + KEITH, DECEMBER 2018



Source: YouTube – SoFi/Mintel

THE CONSUMER



What You Need to Know

Millennials are growing up...

As a generation, Millennials are growing up and bucking the stereotypes of being in their early 20s and selfishly wasting money on trendy items like lattes and avocado toast. Instead, Millennials today are well educated and financially independent, with many being responsible for others (58% are married and 47% have children at home). Even how the generation sees themselves reflects that they are in a transition – not quite the 'cool' kids they once were, yet also not quite as family-oriented as the older generations before them. With the majority of Millennials either having taken on a mortgage or striving towards doing so (see Today's Millennial Lifestage), the generation is ripe for products or services that will help them attain financial success.

...and are busy

Transitioning into 'adulthood' is hitting the generation as they are the most likely to be feeling the weight of balancing career needs, working towards financial goals and keeping up with responsibilities (see Perception of Current Lifestage and Millennial Worries), contributable in part to the generation being most likely to be working full time and looking after young children. In short, they are probably the 'busiest', most time-crunched generation creating a true need for shortcuts and conveniences. The label 'the convenience generation' is not an inaccurate one and this is one label brands can win by accommodating them in this area.

Favourite activities vary by lifestage

With the Millennial age range of 25-42 housing two key defining markers in lifestage (marriage and having children), the generation is literally one in transition – eg half are parents and half are not (see Market Factors). Naturally, this has an impact on how each of

the sub-segments within the generation spend their time. Where Millennial moms enjoy family time above all, single Millennial women are more inclined towards watching movies as their favourite activity (see Favourite Activities). All told, marketers would do well to refine the version of 'Millennial' they are interested in catering to as priorities and interests will vary accordingly.

Reliance on tech makes them different to older generations

Although Millennials did not grow up with the internet like Gen Z, the reliance on social networks and use of technology aligns more with the younger generation than older ones. Like Gen Z, Millennials are more inclined to feel that their social media posts reflect who they really are (see The Impact of Tech on Interactions). As a result, Millennials are also more likely than older generations to feel the consequences of living their lives 'on display' in terms of comparing themselves to others. While this does open up avenues to discuss previously taboo topics like mental health (see What's Trending?), it also creates an environment where viewpoints on how to live life can be overwhelming. In this regard, companies would do well to be less prescriptive in what's right/wrong and provide tools to let consumers achieve their version of success.

For Millennials, brands are an extension of the self

Unlike older generations, the relationship Millennials have with brands differs in that they see brands as reflecting the image they want to portray – ie who they are (see Connecting with Millennial Values). As such, connecting with young adults today means that brands need to step up and be clear about their moral or ethical stance on issues and clearly communicate how they address or support these positions.

Today's Millennial Lifestage

Bucking stereotypical images – they're 'the convenience generation' for a reason

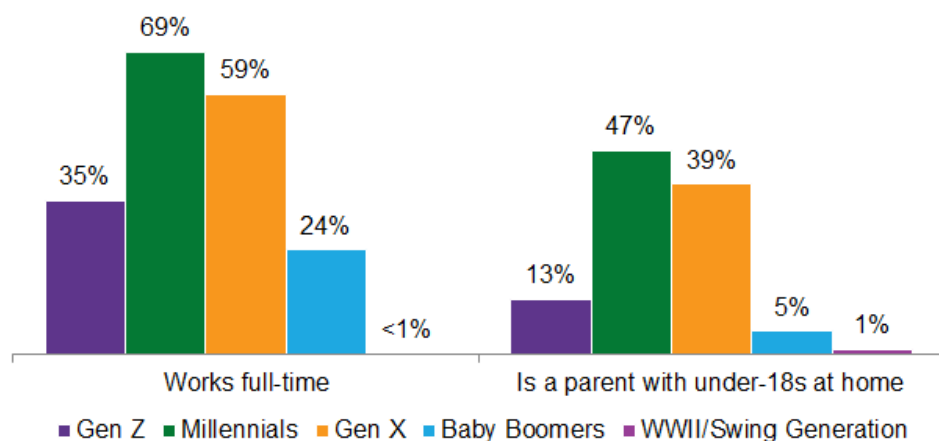
Contrary to popular media portrayals where Millennials are shown to be in their early 20s and selfishly wasting money on trendy items like avocado toast, most Millennials have moved on in their lives and are getting established. Some 39% have graduated from university and seven in 10 (69%) are working full time (see Databook). They're also responsible for others, seen with some 58% who are married and half (47%) who have children under the age of 18 at home. Notably, they are probably the 'busiest', most time-crunched generation as they are the most likely to be working full time and also the most likely to be looking after children under the age of 12 at home. Combined, these factors likely contribute to the generation earning the label 'the convenience generation'. For Millennials, the need for shortcuts or conveniences from companies is real as balancing responsibilities and managing day-to-day logistics is a challenge.

Responsibilities take a toll, creating a real need for shortcuts – ie conveniences

Balancing responsibilities is having an impact on how they live their lives, seen with Millennials being the most inclined to agree that responsibilities prevent them from doing the things they want (see Perception of Current Lifestage). Further, they are the most inclined to report struggling to find downtime on the days

FIGURE 20: KEY DEMOGRAPHICS: WORKS FULL TIME AND PARENTS WITH UNDER-18S AT HOME, BY GENERATIONS, JUNE 2019

"Which of the following best describes your current employment status?"
"Are you the parent/guardian of any children in the following age groups who currently live in your household? Please include any step children you may have in your answer."



Base: 2,000 internet users 18+

Source: Lightspeed/Mintel

they work (see *Canadian Lifestyles: The Cost of Convenience – Canada, April 2019*) showcasing that the generation is putting the demands of work and the needs of their spouses and children before themselves. All told, the generation is bucking the stereotypes of being selfish and lazy and are actually in need of some assistance (ie more convenience offerings) from businesses to help them better be able to manage day-to-day life.

Playing up to the notion of Millennials being 'the convenience generation' should

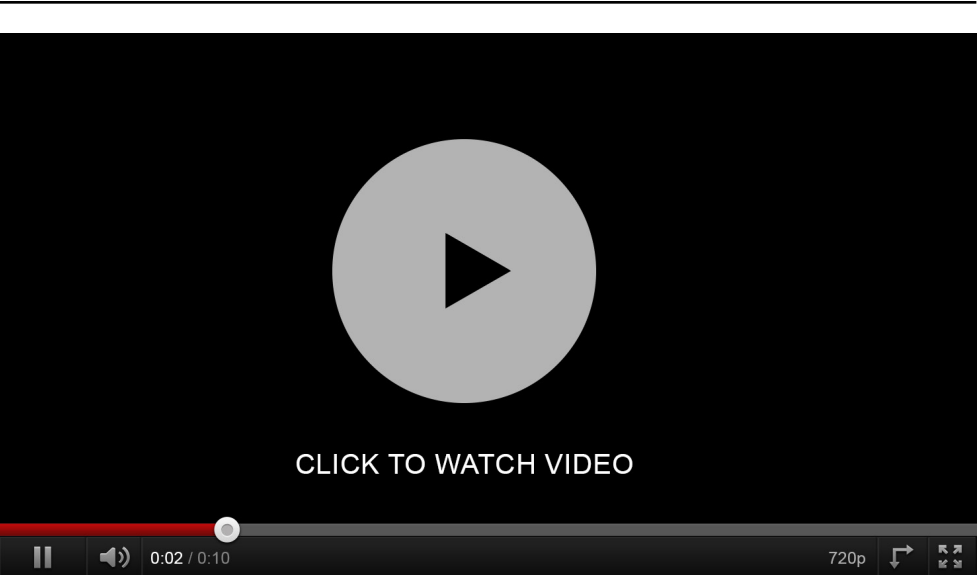
prove beneficial as Millennials are the most likely to say they are willing to pay for time-savings products and services (at 71% vs 65% overall, per the aforementioned report). With Millennials working on managing responsibilities, catering to the needs of young children – ie adulting – companies may actually be in a position to guide them towards choices that make sense for them. A strategy for showcasing the 'right' products is to feature scenarios that are relatable to new/young parents and call attention to the direct benefit that will be gained.

An example of this was seen with grocery retailer Loblaw with its ‘The Talk’ video which showed a set of parents in a car waiting for their click-and-collect order. The parents are shown uncomfortably attempting to address their daughter’s question “where do babies come from?” while a store clerk loads the trunk of their car. The ad ends with the words “Less time shopping. More time parenting.” driving home the point that using such services not only saves time but also creates windows for more family bonding.

Millennials are catching up financially and optimistic about achieving goals

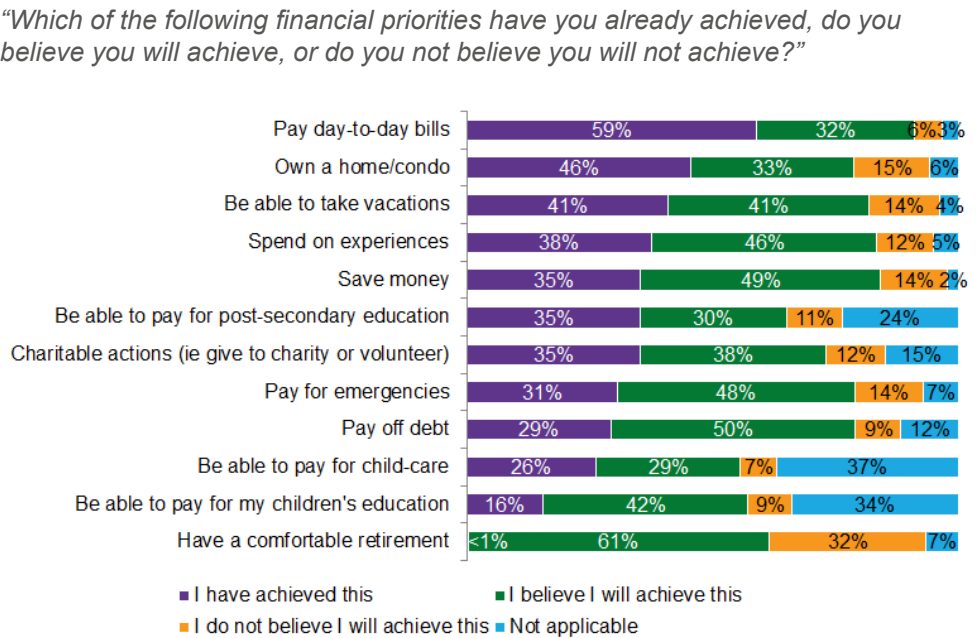
Financially, Millennials are independent and catching up with older generations in terms of household income (30% of Millennials report having a household income of \$100,000 or more compared to 39% of Gen X or older, see Databook). Despite being slightly behind in terms of affluence, nearly half (46%) of Millennials say they have achieved owning a house or condo – further evidence that the generation is ‘growing up’.

FIGURE 21: PC EXPRESS – THE TALK 30SEC, MAY 2019



Source: YouTube – PC_Express/Mintel

FIGURE 22: ACHIEVEMENT OF FINANCIAL GOALS, JUNE 2019



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

Compared to older generations, Millennials are less likely to 'have achieved' most financial goals likely due to their younger age. However, it is important to note that they are optimistic that these goals will be fulfilled, seen with a greater likelihood to say they believe they will achieve all elements than not (see chart above). That Millennials are still working towards key financial staples like paying off debt and goals that may seem further away like having a comfortable retirement, the generation is ripe for products and services that will help them attain financial success.

They're hungry for more info to achieve immediate financial goals

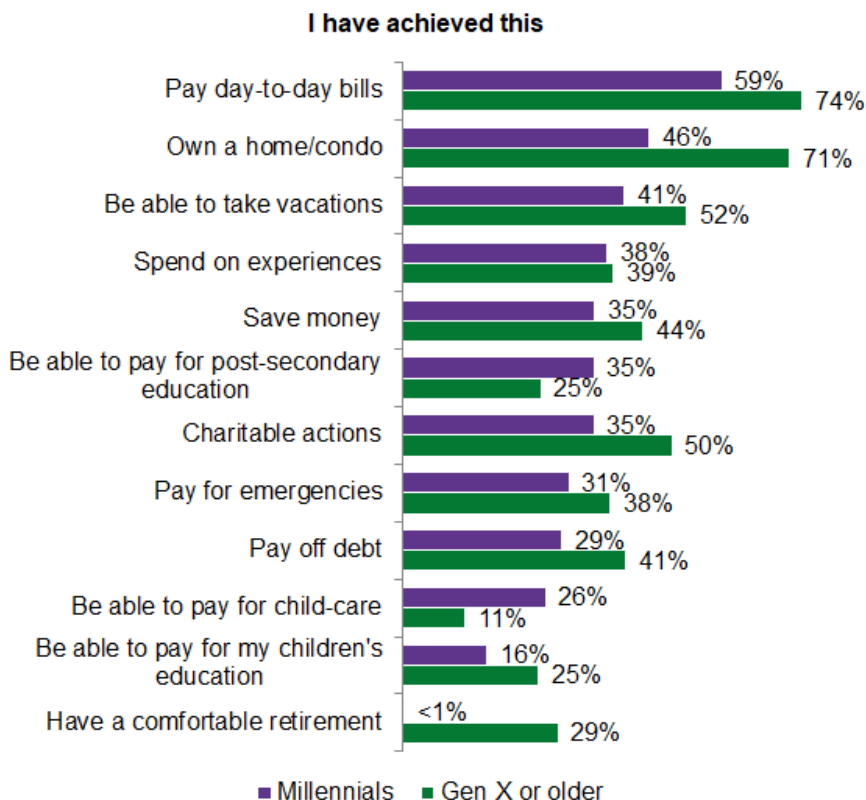
Financial institutions should see gains by promoting online and mobile resources to help individuals with financial management or to improve financial knowledge. This should draw the attention of the generation given that they are working towards achieving their financial goals. Not only are they striving towards goals, the generation lacks confidence in managing their finances relative to older generations (see *Marketing to Millennials – Canada, January 2018*). What is interesting is that the generation is likely aware of this weakness, seen with their greater likelihood to agree with the sentiment 'I would like to learn how to manage my finances better' (see *Financial Literacy – Canada, July 2018*).

A barrier that financial institutions may face here is that many consumers have not embraced the importance being financially literate, per the aforementioned Report. As such, marketers of personal finance management tools or other online/mobile financial resources will need to clearly draw the connection between usage of their products and the end financial goal. In the case of Millennials, showcasing how usage of such tools can lead to success in financial areas that are more immediately relevant to their current lifestage such as saving for their children's education, saving to buy a home/condo or even managing the in-flow/out-flow of regular expenses should be successful.

To this end, encouraging organic conversations where people can discuss questions about financial products or even

FIGURE 23: ACHIEVEMENT OF FINANCIAL GOALS, MILLENNIALS VS OLDER GENERATIONS JUNE 2019

"Which of the following financial priorities have you already achieved, do you believe you will achieve, or do you not believe you will not achieve?"



Base: 1,715 internet users aged 25+

Source: Lightspeed/Mintel

challenges to achieving financial goals may prove fruitful as Millennials are more likely than older generations to feel that suggestions from family/friends heavily influence their financial decisions (as per the aforementioned Report). Platforms akin to Sephora's Beauty Insider Community will work well in this regard as the online and mobile platform fosters a sense of community for engaged consumers to have an open line of communication to both its experts and fellow shoppers.

Millennial women need more assistance with financial management

Financial management is an area where Millennial women may be more challenged than their male counterparts. In addition to being less likely to report success in debt reduction and ability to save money,

younger Millennial women are also more likely to be struggling to pay their daily expenses, seen with only 42% of women aged 25-32 stating that have achieved paying day-to-day bills vs 59% of Millennials overall (see Databook). All told, these results suggest that Millennial women are less confident when it comes to handling their finances which means that financial companies need to find ways to better support to the segment in this area.

Start by acknowledging this is an issue

Data from Mintel's *Healthy Lifestyles – Canada, June 2019* report showed that financial wellness directly relates to one's mental health; the less 'healthy' a consumer sees their financial situation, the more likely they are to be experiencing stress, anxiety and depression. As such, before jumping in

and creating campaigns featuring product offerings and tools such as PFMs (personal finance management), advertisers should address how money management can be stressful and emotionally taxing.

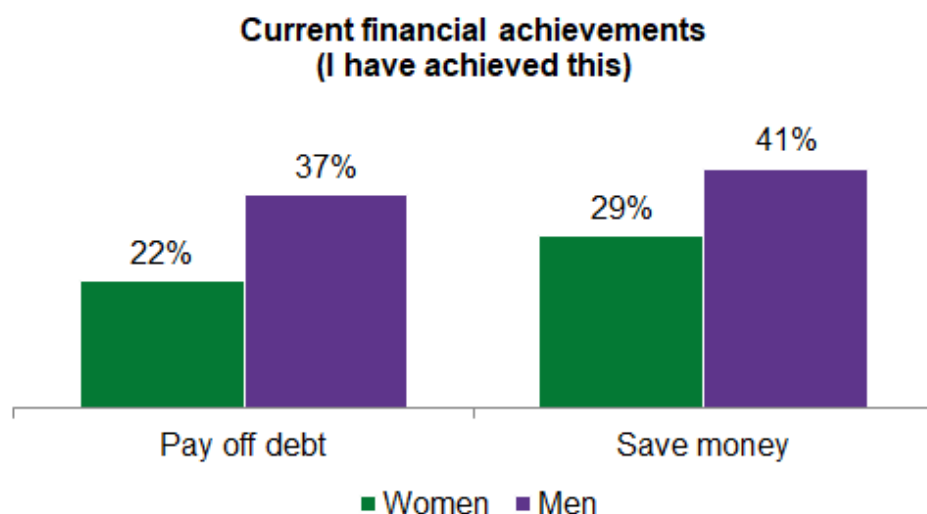
In this regard, financial institutions in Canada may wish to consider following the lead of their US counterparts in getting consumers to talk more openly about the emotional toll that managing debt can take. As discussed in Mintel Trend, *Open Diary*, consumers today are more comfortable in making private matters public than ever before. As such, honest sincere dialogue about previously stigmatized topics like managing debt are likely to resonate with consumers – particularly younger ones who are living their lives online, like Millennial (see The Impact of Tech on Interactions).

Case studies: SoFi and Visa

An example of this type of strategy was seen with online financial institution, SoFi. The company created a campaign which featured strangers openly discussing the impact of money on one's life. The campaign discussed in the What's Next? section showcases videos where strangers are heard talking about their debt, their low points with debt and how it can be isolating and shameful. The company also created a Facebook page which is accessible via the hashtag #moneytalks to allow consumers to have open conversations about their own experiences.

FIGURE 24: ACHIEVEMENT OF FINANCIAL GOALS, BY GENDER, JUNE 2019

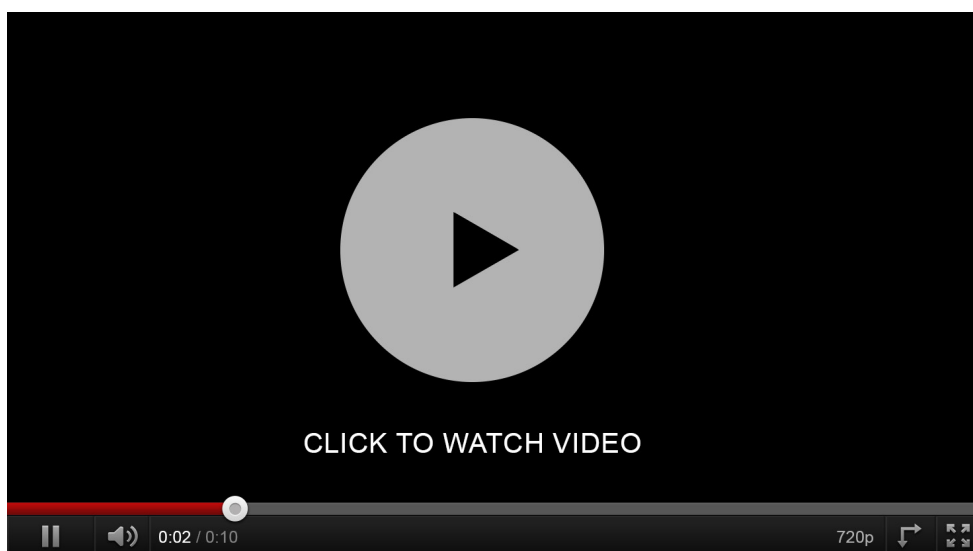
"Which of the following financial priorities have you already achieved, do you believe you will achieve, or do you not believe you will not achieve?"



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

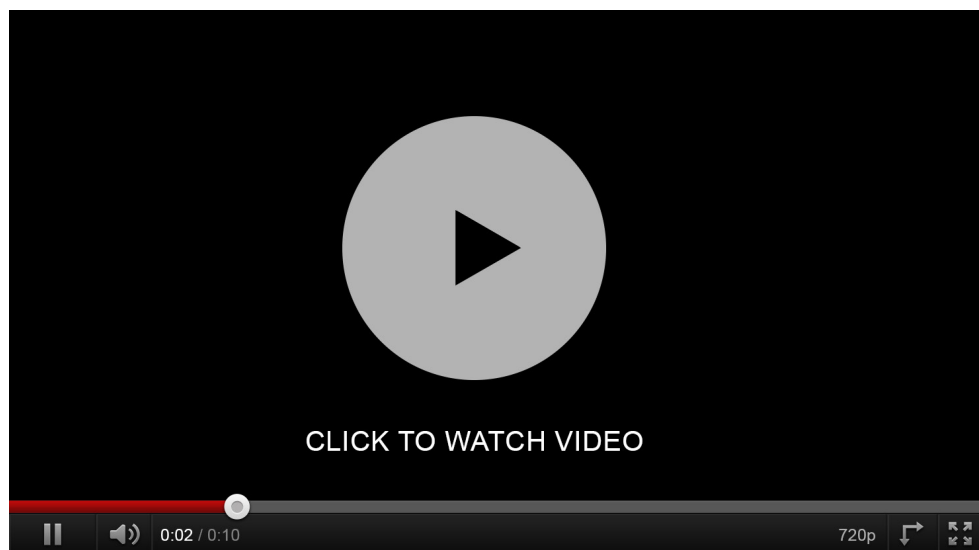
FIGURE 25: MONEY IS CHANGING: THE COST, FEBRUARY 2019



Source: YouTube – Visa/Mintel

In February 2019, Visa has taken this one step further and created a campaign that specifically addresses women. In its 'Money is Changing' campaign, the company has launched a digital ad called The Cost which showed the literal cost of a woman in various scenarios when she chose to avoid talking about money. In tandem with the launch of this campaign, the company has also launched its "How I Changed It" content series which features real women talking about the challenges they've faced and how they overcame them. The company rounded out the campaign with its Motivating Stories ad which features female designers, directors, producers and activists who will share personal stories of how they changed their financial circumstances by speaking up.

FIGURE 26: MONEY IS CHANGING: PAY EQUALITY IN HOLLYWOOD, FEBRUARY 2019



Source: YouTube – Visa/Mintel

Perception of Current Lifestage

Millennials see themselves as being in transition

As discussed in the Today's Millennial Lifestage section, Millennials are adulting and focused on financial goals. Indeed, the data from this Report reflects that how the generation sees themselves as 'growing up'. When Millennials were asked to describe people of different ages, the results show that they feel they've moved on from being 'cool' and focused solely on themselves, but haven't quite moved towards the degree to which Gen X are family-focused or Baby Boomers are financially successful. For the generation, the lifestage is seen to be defined by settling into their careers, likely driven in part because of their focus on moving ahead in life. Because they see themselves in a time of transition, marketing efforts need to 'grow' alongside the generation.

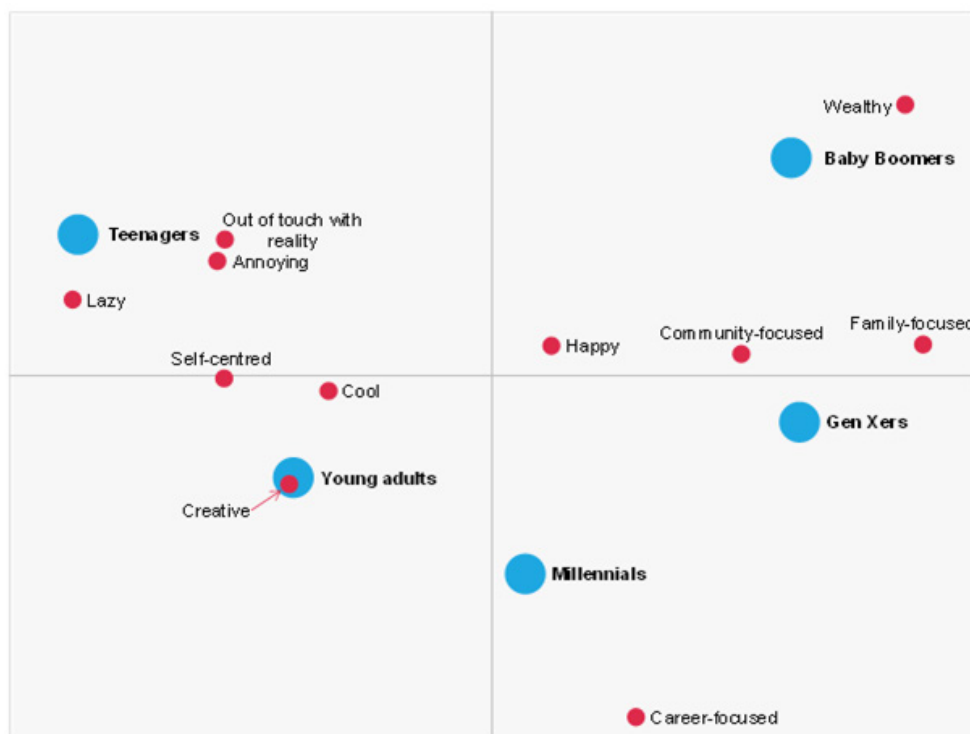
How to read: correspondence analysis illustrates which words/phrases consumers associate with each age group. The proximity of the words (red dots) to each other and the proximity of the age groups (blue dots) to each other indicates the relationship between them. The closer the two points, the stronger the association. See Appendix for full methodology.

Career-oriented images are relatable

These results indicate that there's likely a level of pride that's taken in being career-oriented and marketing efforts tapping into the notion that they are working and proud of it will likely hold a level of resonance – particularly as some of the stereotypes that have plagued the generation has been that they are lazy and entitled. To this end, tying in the issue of trying to balance work-life

FIGURE 27: CORRESPONDENCE ANALYSIS – SYMMETRICAL MAP – GENERATIONAL PERSPECTIVES, JUNE 2019

"Which of these words would you use to describe people in the following age groups? There are no right or wrong answers; we just want to know your opinion of people this age in general. Please select all that apply per group."



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

and self-care or personal life is likely to strike a personal chord as it relates to being both responsible and goal-oriented at the same time.

When developing campaigns that show the struggle to balance work-life against self-care, companies may be able to take inspiration from Loblaw's 'Eat Together' video that was released in December 2017. The video starts by featuring a Millennial woman's memories throughout her life of when she

has bonded with people over food, only then to reveal that she is sitting in an office setting where everyone is eating by themselves at their desk. The ad does a good job of showcasing how consumer dedication to work can interfere with managing wellness in our day-to-day settings. This campaign was developed as part of Loblaw's larger 'Eat Together' campaign which was created to showcase how the act of enjoying food together has the positive side effect of bringing people together.

Most aren't quite where they thought they'd be, but they're optimistic

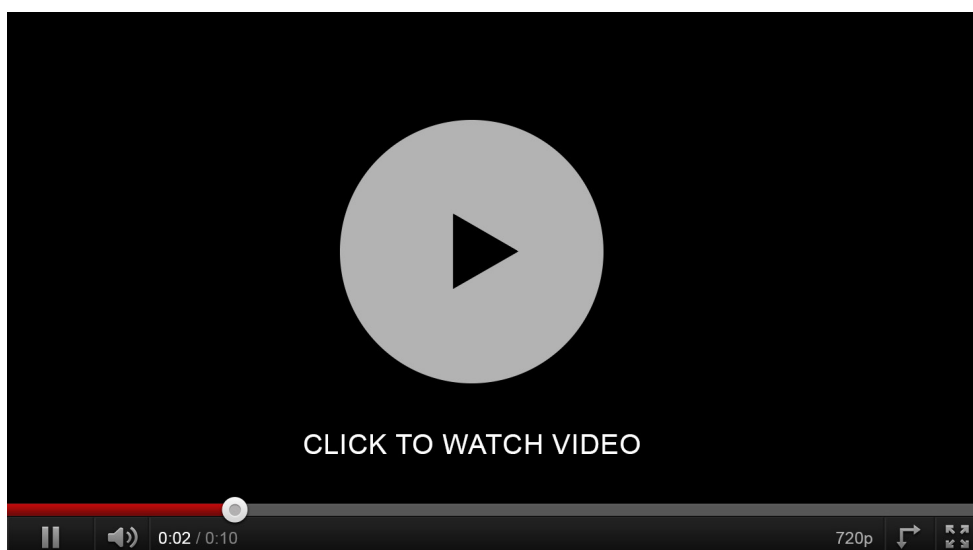
Settling into homeownership and becoming parents (see Today's Millennial Lifestage) is leading Millennials to focus more on 'adulting' and there's a sense that reality has hit. While Millennials are optimistic and feeling good about their future, 56% feel they aren't quite where they thought they'd be at this point in their life and about the same proportion (53%) say that responsibilities are getting in the way from doing what they want.

They are a generation in transition and could use some help

The weight of responsibilities being felt by Millennials becomes much more apparent when their data is looked at in comparison to the rest of the population; they are much more likely to feel hindered by responsibilities than average. Although they are more likely to be optimistic about the future, they are in the midst of adjusting to 'adult' responsibilities of home ownership and parenting (see Today's Millennial Lifestage). Beyond managing mortgage payments and day-to-day expenses, they are also figuring out how to learn and balance life skills like managing a household and taking care of their children.

As discussed in the aforementioned section, they are sometimes called the 'convenience generation' for good reason. There is a practical need for time-saving products and solutions as they navigate taking on 'adult' responsibilities. The need is so strong that 71% of Millennials say they are willing to pay for time-saving products and solutions (see Canadian Lifestyles: *The Cost of Convenience – Canada, April 2019*) meaning that companies stand to gain by promoting things like digital access to experts so enquiries or issues can be quickly addressed, or mobile ordering and/or curbside pickup to save a little time on daily chores, etc.

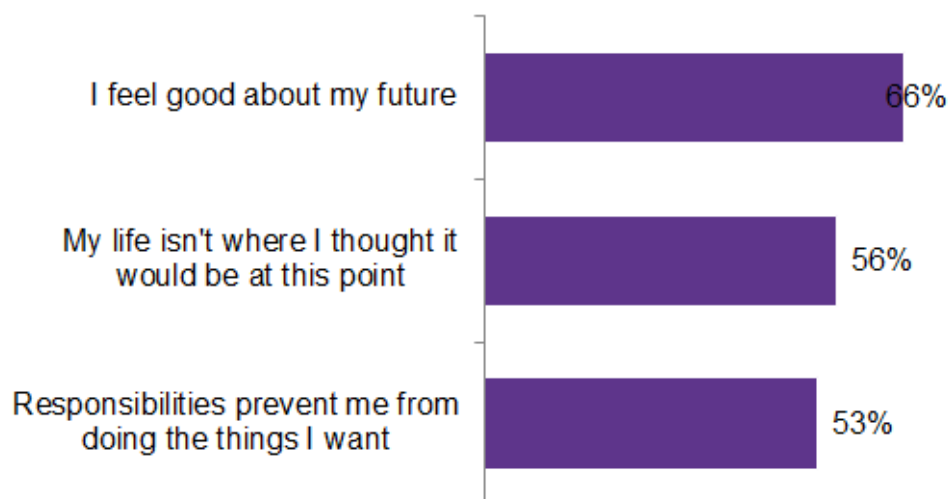
FIGURE 28: #EATTOGETHER 2018, DECEMBER 2017



Source: YouTube – President's Choice/Mintel

FIGURE 29: ATTITUDES TOWARDS CURRENT LIFESTAGE (% ANY AGREE), JUNE 2019

"How much do you agree or disagree with the following statements?"



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

Parenting for the Millennials is unique

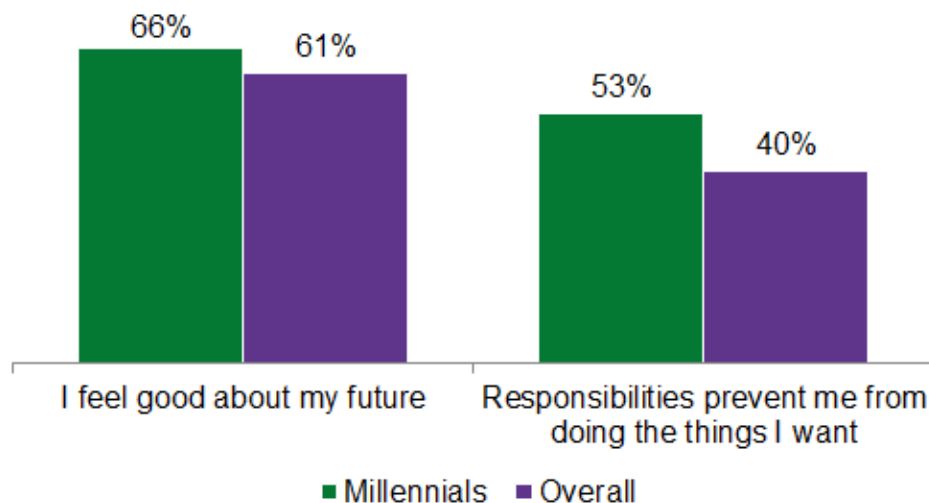
Parenting for Millennials (literally) looks different than previous generations

It is important to point out that the task of parenting looks different for Millennials than for generations before them. Traditionally, parents had much more clearly defined roles: fathers were the breadwinners and mothers took care of the household and childcare. However, as more households are being led by two full-time working parents (ie, more women are in the workforce than ever before, see Market Factors), the distribution of housework and childcare is shifting by necessity; men are contributing more than ever before and women are balancing work demands against household responsibilities. Not only are more moms in the workplace than before, the later age at which people are having children means that women are also more established in their careers when they have children – ie have pressure to be career-minded but also a good mother.

Further, Millennial usage and dependency on social media (see Interaction Preferences) means they are literally seeing what parenting today is supposed to look like. This is different than older generations where advertisements on TV were the primary portayal of parenting that parents were exposed to. Now, Millennial parents are putting themselves 'on display' by posting who they really are on social media (per the aforementioned section) and at the same time, getting to see what any and all aspects of parenting look like from their friends, family, brands, celebrities, etc on a daily basis. This is creating an environment

FIGURE 30: ATTITUDES TOWARDS CURRENT LIFESTAGE (% ANY AGREE), MILLENNIALS VS OVERALL, JUNE 2019

"How much do you agree or disagree with the following statements?"



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

where there is a constant comparison point or measuring stick in how they are doing and across all aspects (as a parent, as a husband/wife, as an employee, etc) – something that did not exist to the same degree for older generations.

Connecting with Millennial parents means supporting them to achieve their version of success

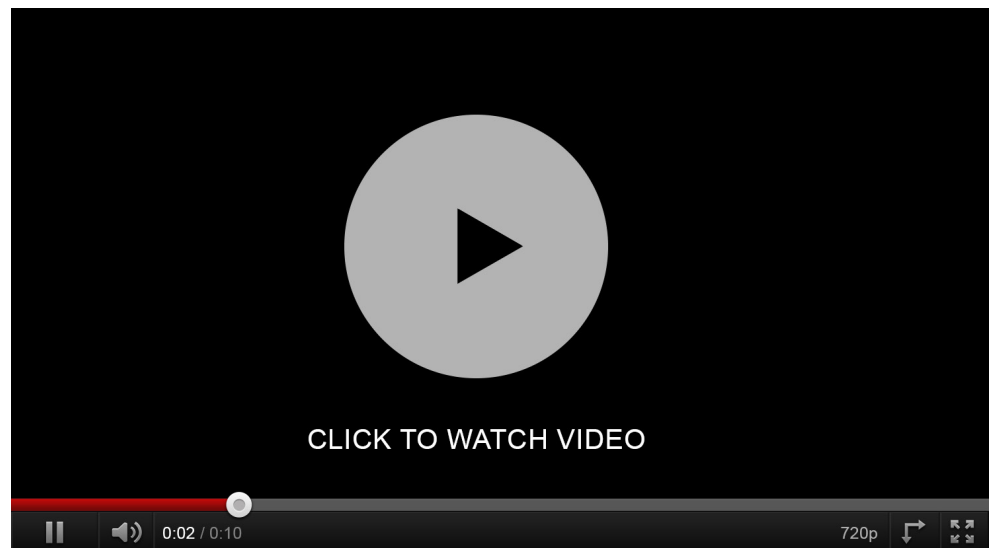
With all the different elements at play, Millennial parents will pick and choose a lane that works for them, meaning that what they see as 'success' will likely be unique to them as individuals as opposed to trying to follow a more clearly defined image. This aligns with Mintel Trend, *Redefining Adulthood* which discusses how consumers

are adapting their lives in ways that don't fit traditional molds. For Millennials, the aforementioned shifts in society described above are almost forcing the generation to create a new norm – or at least one that works for them. For companies, convenience offerings such as mobile ordering or curbside pickup represent a key area of opportunity as the generation is the most time-crunched (see Today's Millennial Lifestage). Importantly, marketing of such products must be positioned as creating the capacity for them to live their adult lives how they like if they are to gain traction with this audience because Millennial parents are carving out their own style of parenting, or more generally, living.

Case studies of parenting scenarios: McCafé and PC Financial

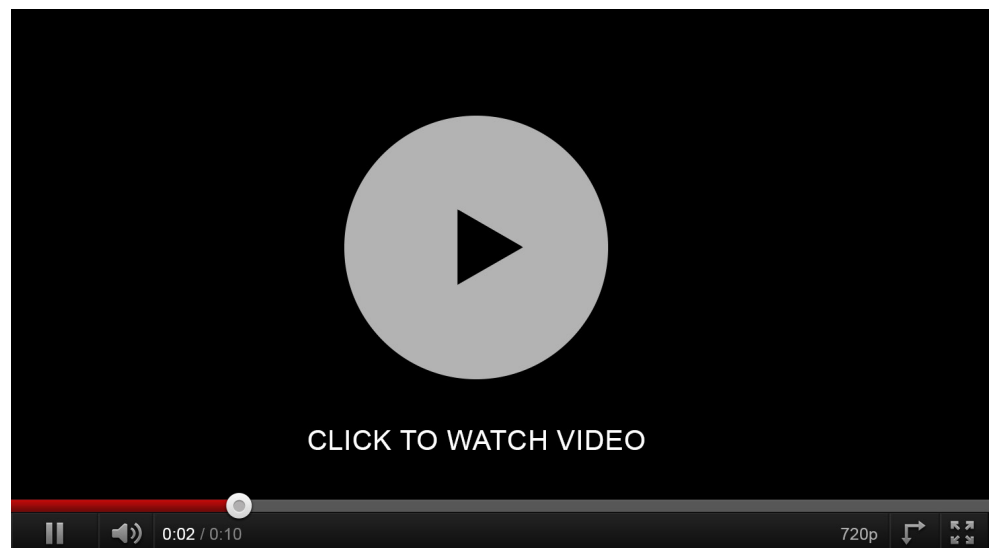
Below are two examples of campaigns that link convenience offerings to different scenarios of parenting. The Singing campaign from McDonald's shows how using its mobile ordering feature creates a small window of time for a father to sing along with his children. The PC Financial Cake Mix ad shows how its reward programs can add a little fun to simple activities like baking for the family. What is also notable about these two ads is that they do not depict the traditional family unit of a mother, a father and their children. The first ad shows just a father, while the second shows two fathers with their daughter. These scenarios also represent the diversifying household structure that Millennials are living in today (see Market Factors).

FIGURE 31: MCCAFFÉ MOBILE ORDER AND PAY | SINGING, MARCH 2019



Source: YouTube – McDonald's/Mintel

FIGURE 32: PC FINANCIAL | CAKE MIX, MAY 2019



Source: YouTube – PC Financial /Mintel

Parents are undeterred by responsibilities in their optimism

Most notably, with all that is going on for Millennial parents, they remain much more inclined to be optimistic in their outlook on the future than non-parents – even despite being more likely to feel hindered by responsibilities. These results suggest that although having children requires time and effort, there is an enjoyment that comes out of being a parent and that having children provides an additional sense of hope for the future. For marketers, this means that the inclusion of children in ad campaigns will provide an automatic common ground for Millennial parents to relate to, particularly if scenarios presented tap into issues they as Millennial parents uniquely deal with. An example of this is discussed below.

Don't shy away from the unique challenges facing Millennial parents

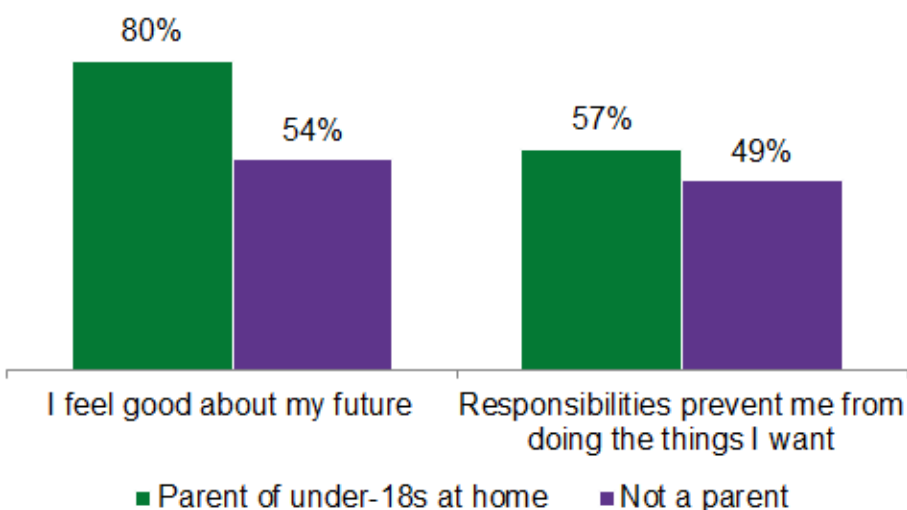
Bringing this full circle to the fact that Millennial parenting looks different today than for generations before them, marketers should benefit from showcasing exactly that – the unique challenges faced by Millennial parents today.

Case study of showcasing today's issues: Spark

A fun example of this was seen in New Zealand from telecom company, Spark, in September 2018. The company's 'Generation Voice' video shows children 'fact checking' the common fibs told by parents to kids using various forms of technology ranging from smartphones to smart speakers. While the children's reactions are shown as they hear the results, the background music lyrics 'We are going to rule the world, don't you know don't you know' are heard. The ad then ends with a son saying to his mom, 'we have to talk.' This ad does a great job of showcasing a unique challenge presented to Millennial parents today that did not exist for generations before them: that children have the power of the internet at their hands and the issues this may present.

FIGURE 33: ATTITUDES TOWARDS CURRENT LIFESTAGE (% ANY AGREE), MILLENNIALS VS OVERALL, JUNE 2019

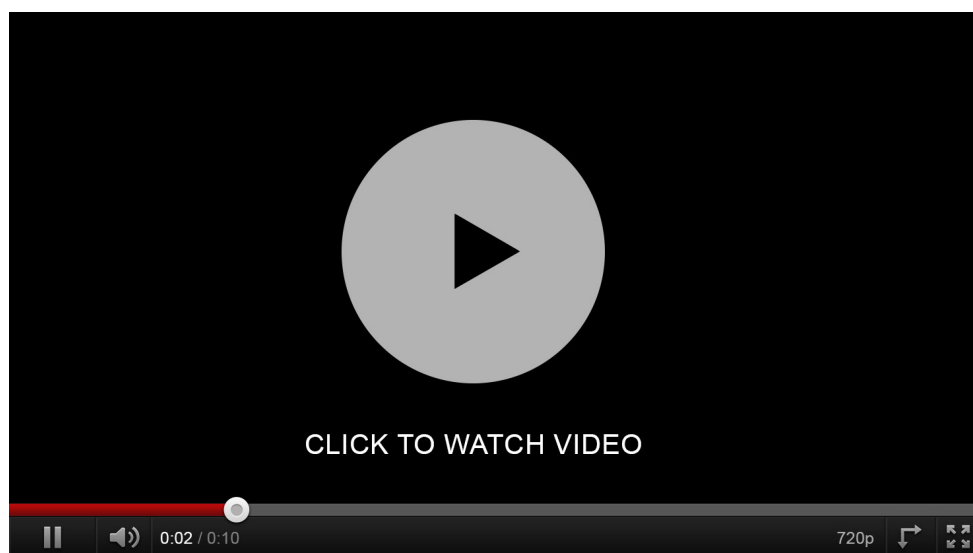
"How much do you agree or disagree with the following statements?"



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

FIGURE 34: GENERATION VOICE IS HERE, SEPTEMBER 2018



Source: YouTube – Spark/Mintel

Millennial Worries

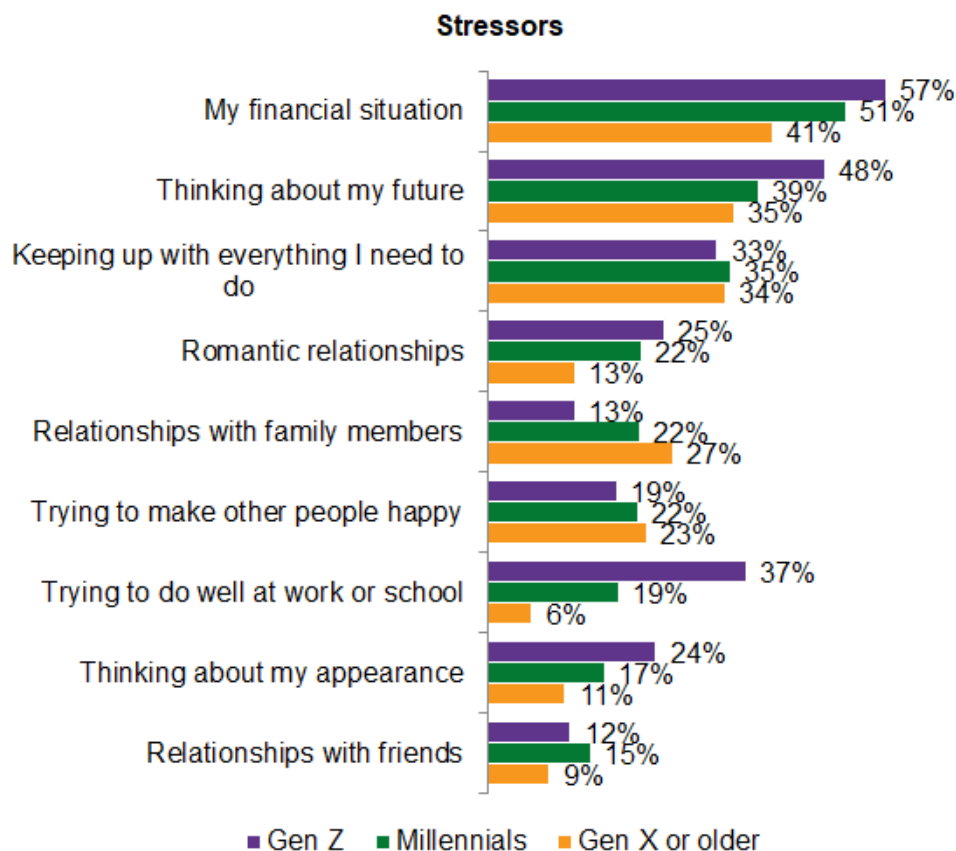
Millennial are in a transitional period, as are their worries

Like all other generations, Millennials are most likely to cite their financial situation, their future and current responsibilities (ie keeping up with everything they need to do) as the three areas that stress them out the most. Notably, the degree to which Millennials are likely to choose the first two areas as their major worries, highlights that they are a generation that is transitioning in lifestage, in that Millennials are right in the middle in their likelihood to be worried about their financial situation. This is understandable as they are settling into careers and are likely starting to achieve a level of financial stability, especially compared to Gen Z who are likely to be still in school. At the same time, they are still more likely to be working towards financial goals like home ownership than older generations, and the focus on the future likely keeps financial matters top of mind for the segment.

The transitional mindset is a reflection of the transitional stage in life. As discussed in the Market Factors section, the Millennial age range often houses two major lifestage markers: first marriage and becoming a parent. This means that the generation is the most divided in terms of lifestage where half are parents and half are not, for example. What follows is a discussion of three different lifestages within the Millennial generation: motherhood, parents of teens/tweens and younger Millennial men.

FIGURE 35: STRESSORS (ANY RANK), BY GENERATION, JUNE 2019

"Which of the following things stress you out the most? Please select and rank up to three responses, with 1 being the most stressful."



Base: 2,000 internet users aged 18+

Source: Lightspeed/Mintel

More 'titles' means more stressors for Millennial women

Recap: Millennial women are more likely to be worried about their financial situation

As Millennial women adopt more 'adult' titles or statuses, the more likely it is that they feel the weight associated with the responsibilities that come with each 'level' of adulthood. Corresponding to the finding that Millennial women are more likely to struggle with financial management (see Today's Millennial Lifestage), they are also more inclined to be worried about their financial situation (at 56% who cite this as an area that stresses them out the most vs 47% of Millennial men, see Databook).

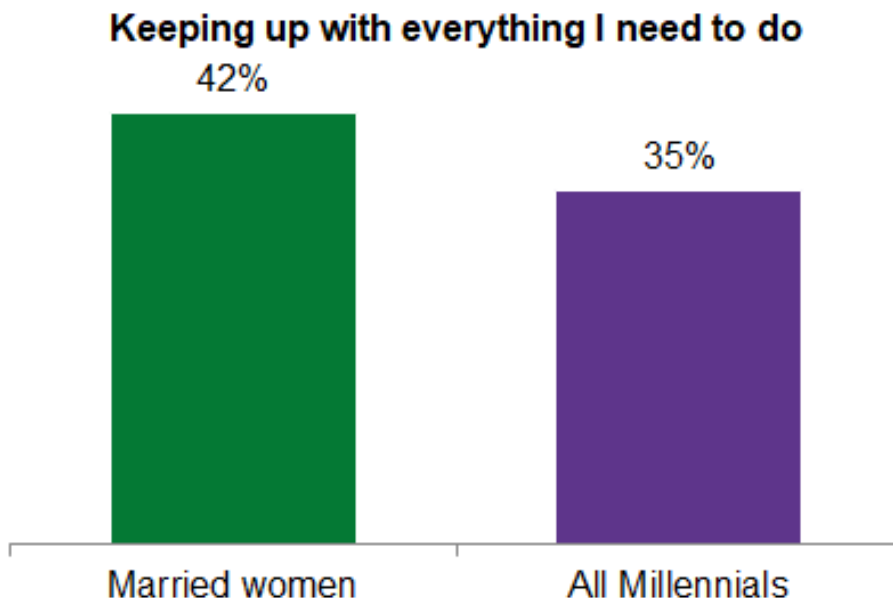
The practical double shift: married women stress about keeping up with responsibilities

On top of financial worries, married Millennial women are much more likely to say that 'keeping up with everything I need to do' is a stressor, compared to single Millennial women and married Millennial men. This finding is noteworthy as it highlights a weight associated with managing household chores as the day-to-day household activities continue to skew more heavily towards women. For example, women are more likely to hold primary responsibility for cooking and grocery shopping (see *Cooking Enthusiasts – Canada, December 2018* and *Grocery Retailing – Canada, August 2018*). Further, balancing household labour may be more of an issue for married Millennial women as they are also more likely to be working full-time than married women overall (at 59% vs 44%, respectively, see Databook).

While it must be acknowledged that men are contributing more to the household than before, equality in terms of distribution of household labour remains more of an aspiration than a reality. As such, companies are likely to see gains by promoting convenience offerings to married Millennial women to add ease to daily routines such as meal kits, mobile ordering or curbside pickup. For a more detailed discussion of the need for shortcuts, see Perception of Current Lifestage.

FIGURE 36: STRESSOR: 'KEEPING UP WITH EVERYTHING I NEED TO DO' (ANY RANK), MARRIED MILLENNIAL WOMEN VS MILLENNIALS OVERALL, JUNE 2019

"Which of the following things stress you out the most? Please select and rank up to three responses, with 1 being the most stressful."



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

The emotional double shift: Millennial moms stress about making everyone happy

When parenting is added into the mix, the data shows that Millennial women who are moms are further feeling squeezed by looking after the needs of the family; Millennial moms are the most likely to report 'trying to make other people happy' as a stressor. This may stem from the fact that mothers are more likely the ones primarily responsible for coordinating schedules for children's activities (see *Marketing to Parents – Canada, September 2016*).

Between balancing work demands, managing household chores and worrying about the happiness of others, Millennial moms will likely need some reminders and tools to look after their own needs. Of note, one of the 'tools' that may be required is to provide reassurance or 'permission' that taking a moment for themselves is acceptable and healthy. This strategy is necessary because moms see themselves as more selfish than other 'typical' moms, indicating that there is a level of guilt

associated with taking time for themselves (see *Marketing to Moms – Canada, September 2018*). Further, managing the various responsibilities combined with guilt is taking a toll on their mental health as moms are more likely to be experiencing anxiety than most (see *Healthy Lifestyles – Canada, June 2019*). This latter point highlights that a little reprieve will go a long way for moms.

Connecting with Millennial moms means positioning products and shortcuts (ie convenience offerings) in scenarios that are realistic to them. As Millennial moms are feeling pressed from multiple angles, promotions of activities that require dedicated time away from daily tasks/chores may seem less plausible for their daily lives. Instead, marketers will be able to better gain their attention by finding ways to integrate moments of self-care or mental breaks to convenience offerings. This is discussed below.

Shortcuts need to address both and be positioned in a way that works for them

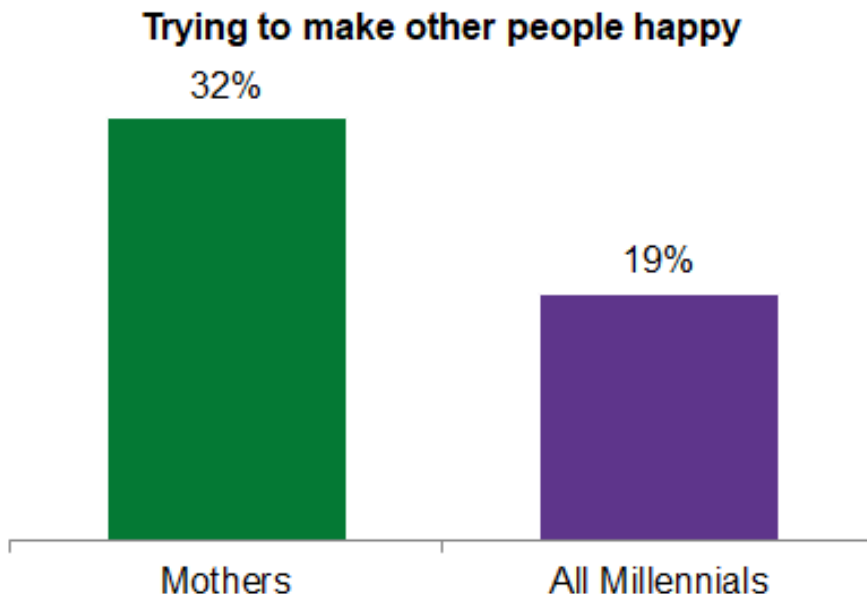
As discussed above, married Millennial women will be in need of shortcuts to manage day-to-day chores more so than other Millennial segments. For marketers looking to connect with Millennial moms, greater success will likely be had if convenience offerings like mobile ordering and curbside pickup are depicted as an opportunity to gain short moments of mental relief or enjoyment. For example, the Singing campaign from McDonald's (discussed in Perception of Current Lifestage, ad link below) which shows how using its mobile ordering feature creates a small window of time for a father to sing along with his children could be tweaked to show a Millennial mom in her car by herself on her way home from work picking up dinner. She could be shown as singing along to the songs or music genres she likes instead of the music her children or even husband prefer to listen to. This way, the moment is presented as one that is just for her – something that's likely hard to come by on a regular basis.

Four in 10 have older children, making family relationships an area of focus

Need more evidence that the generation is growing up? How about the fact that some 37% of Millennials have children between the ages of 6-17 at home (skewing up to 56% of older Millennials). Naturally, having children at home (and specifically tweens and teens) comes with its challenges, leading this segment to be more likely to be focused on relationships with family members.

FIGURE 37: STRESSOR: 'TRYING TO MAKE EVERYONE HAPPY' (ANY RANK), MILLENNIAL MOTHERS VS MILLENNIALS OVERALL, JUNE 2019

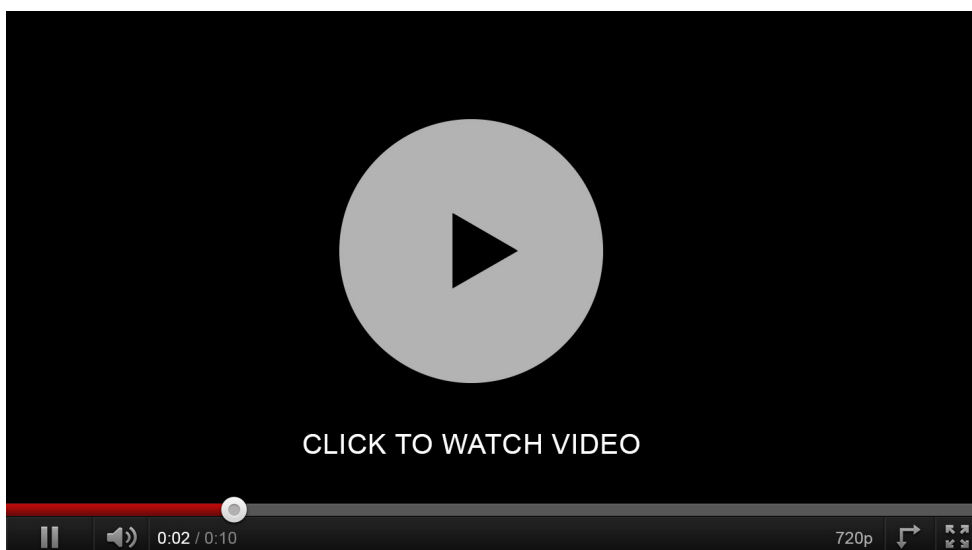
"Which of the following things stress you out the most? Please select and rank up to three responses, with 1 being the most stressful."



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

FIGURE 38: MCCAFFÉ MOBILE ORDER AND PAY | SINGING, MARCH 2019



Source: YouTube – McDonald's/Mintel

For marketers, relating to Millennials must break out of the stereotypical image of 'young-ish' consumers shirking their responsibilities, selfishly indulging in experiences like eating avocado toast. Instead, connecting with Millennials should be more about showcasing family activities and experiences that the whole family will enjoy. A more relatable image to today's Millennial will be one where they are at a pop-up shop standing next to his/her tween/teen, both holding their avocado toasts and posing for a selfie.

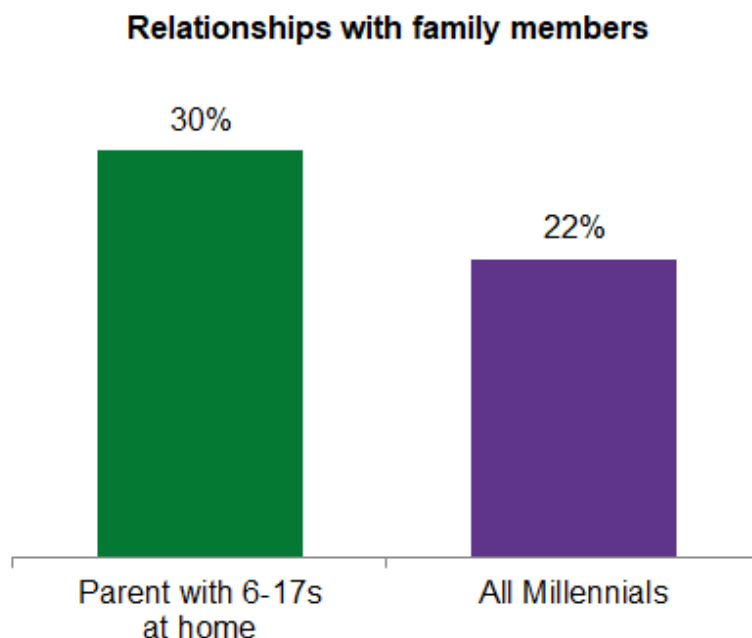
Experience Generation? Yes, but for the whole family

In fact, experiences may count for more for Millennial parents as they are now shared moments between them and their children. In this regard, the data from this Report does reflect that parents are more likely to prefer spending on experiences over things (65% of parents with under-18s at home who agree with this sentiment vs 54% of Millennial non-parents, see Databook). Further, parents with 6-17s actively look for family entertainment activities that require their family members to talk to each other (see *Family Entertainment – Canada, February 2019*), highlighting that the notion of family bonding being a priority. All told, these results reinforce that experiences that are sought after go beyond purely the interests of themselves to one that is enjoyable for the whole family.

With this in mind, companies may benefit from taking inspiration from Visit California's Parents Love It ad that launched in April 2019. The video takes a more light-hearted approach to showcasing how a destination could be enjoyable to both kids and as well as their parents. As the ad shows a variety of tourist attractions throughout the state, it features the children narrating the joy gained by the parents from visiting the locations. This is an opposite approach to more typical travel ads where the children's happiness is centre stage.

FIGURE 39: STRESSOR: 'RELATIONSHIPS WITH FAMILY MEMBERS (ANY RANK), MILLENNIAL PARENTS WITH 6-17S AT HOME VS MILLENNIALS OVERALL, JUNE 2019

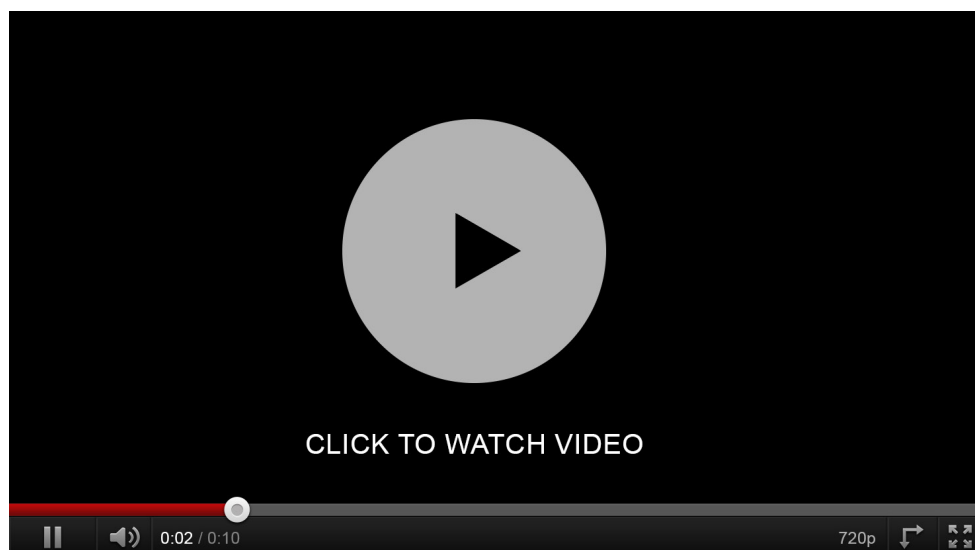
"Which of the following things stress you out the most? Please select and rank up to three responses, with 1 being the most stressful."



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

FIGURE 40: PARENTS LOVE IT, APRIL 2019



Source: YouTube – Visit California/Mintel

Of course, showcasing the happiness of children is important as they hold a good amount of influence on activity choices (as discussed above). However, experiences must also be appealing to the Millennial parents themselves as they too have a stake in the game – just because they're parents doesn't mean they're ready to give up on fun.

Make the emotional connection the star

From foodservice providers to leisure and entertainment companies, gains will likely be seen if marketing efforts directly showcase the potential connection that can happen between a parent and a child by participating in the company's experience offering. After all, the value of experiences lies in the fact that they can be shared. This sentiment was seen in the online focus groups conducted for this Report when participants were asked to identify the types of experiences most valuable to them.

"I like any experiences where you get to connect with friends and family and spend some quality time together. I like dining out with people too because eating together is a good way to share something with people you care about."

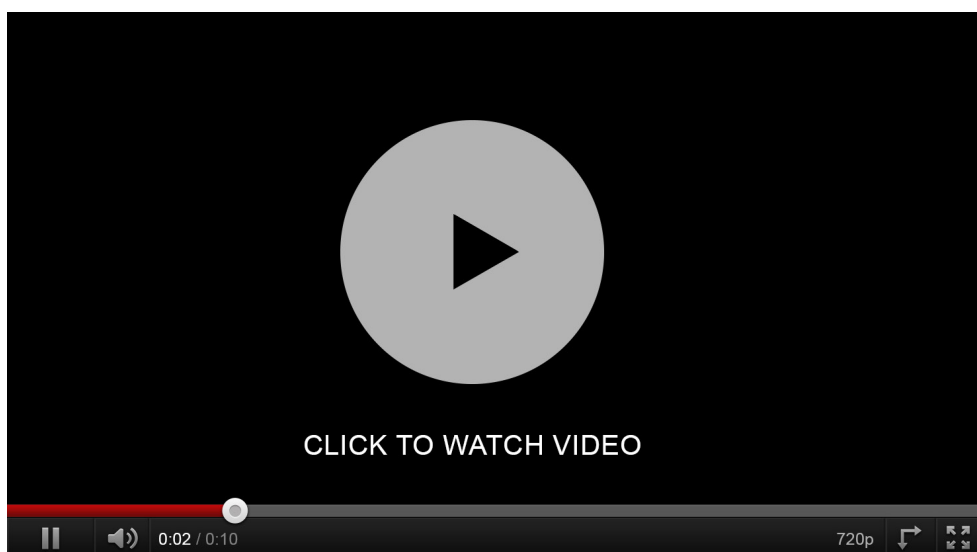
Older Millennial mother, British Columbia

"I love to travel to unique locations with the family because we're making new memories together that can be enjoyed for the rest of our lives (hopefully)."

Older Millennial father, Quebec

Tapping into to shared moments and emotional connections should resonate well with Millennial parents given their focus on relationships between family members – again, owing to them having children at home.

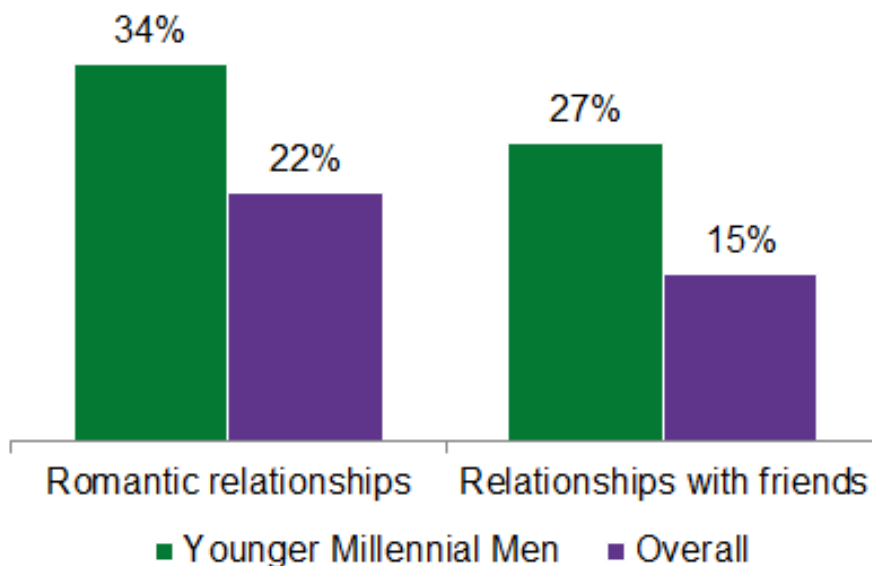
FIGURE 41: SHARE REEL LOVE FOR FATHER'S DAY, JUNE 2017



Source: YouTube – CineplexMovies/Mintel

FIGURE 42: STRESSORS: 'ROMANTIC RELATIONSHIPS' AND 'RELATIONSHIPS WITH FRIENDS' (ANY RANK), YOUNGER MILLENNIAL MEN VS MILLENNIALS OVERALL, JUNE 2019

"Which of the following things stress you out the most? Please select and rank up to three responses, with 1 being the most stressful."



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

Case study on bonding: Cineplex

A good example of a campaign that specifically linked the entertainment activity to the emotional connection that can take place while jointly participating in the company's activity was seen with Cineplex's Father's Day 2017 campaign. The ad showed a series of fathers watching a private screening with their child and opened with the words 'we all want to share the things we love, with the ones we love'. The video reiterates the bond by ending with the father and child themselves describing the special relationship they have with each other.

Young Millennial men find personal relationships stressful

With Young Millennial men being more likely to be single (49% vs 39% overall), it would be expected that they will be spending more time with their friends and dating, and that doing so should be fun. Surprisingly, the data from this Report shows that the segment is more likely to find these types of interactions to be stressful. These results suggest that young Millennial men may be drawn to environments that foster friendly social interactions. To this end, businesses focused on building communities are likely to appeal.

Set up Young Millennial Men with the right conditions to mix and mingle

With regards to creating communities to gain the attention of young Millennial men,

businesses may find gains by creating themed-focused settings with clearly defined social interactions like classes or structured events. Some examples of this are discussed below.

Case studies on layering on the ideal settings: Lululemon, Safeway and Metro

Lululemon is a company that has been doing a good job of creating communities within the fitness community. What is notable about its efforts is that it hones in on specific demographics with events like men-only free fitness classes. These types of sessions are likely to draw in young Millennial men as it allows for like-minded people to mix, mingle or simply to meet new friends.

Similarly, brands may also see gains by actually hosting meetups that are linked to their categories. Grocery retailers Metro and Safeway had embarked on this type of strategy in 2015 when they hosted singles nights. In March of that year, Safeway operated a singles night in a Winnipeg location where it asked singles to tie a produce bag to their shopping cart – a green one for same-sex matches, or red one for heterosexual matches. In May of that year, Metro invited single grocery shoppers to its Liberty Village location. Those partaking in the fun evening's theme were asked to put a red ribbon on their carts or basket to visually signify their participation. The event included a relationship expert, Jen Kirsch (who writes a weekly column on relationships for younger women), on location to serve

up advice on engaging potential partners, a DJ, complimentary gift bags and in-store surprises.

Case study on matching online with offline interactions: Bumble

To appeal to younger audiences, marketers may be able to take a less formalized approach and create fun 'matching opportunities' such as those described above at more modern shopping experiences like pop-up shops. Embarking on this type of strategy aligns with Mintel Trend, *Extend My Brand* which discusses how companies today are expanding beyond their core offerings and into new categories as a way to attract new customers.

Of course, embarking on this strategy is not limited to just retailers with pre-established physical spaces. A related example of an app-based company creating interaction opportunities is seen with dating app, Bumble, announcing that it will be opening a coffee and wine bar in New York City in the fall of 2019. Aptly named Bumble Brew, the venue will be a coffee shop during the day and a wine bar in the evening that features 'date-friendly' small plates (ie no slurping or dirty hands). The location will also have programming such as female chef demos, BFF parties, networking events and date nights.

Favourite Activities

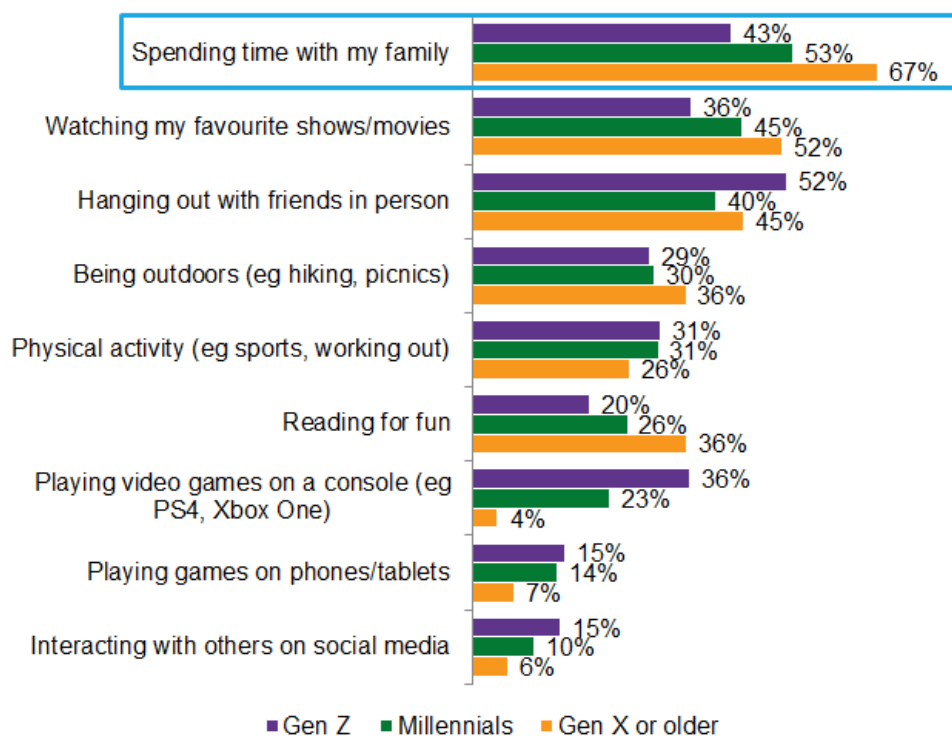
Family time tops the list

Millennials are not that different from other generations in that family time, watching their favourite shows/movies and hanging out with friends in person rounds out the top the three types of activities they enjoy doing the most. With in-person time with family and friends being amongst the top rated favourite activities and the growing popularity of streaming services like Netflix, it is no wonder that consumers lean more towards a preference for staying at home rather than going out (59% of consumers of all ages, with 61% of Millennials holding this sentiment, see Databook).

That Millennials are most likely to rate spending time with family shows that parenting is having an impact on their lifestage. They are more like older generations in this way and less like Gen Z, who rate hanging out with friends as their top activity. While this does align with the fact that nearly half (47%) of Millennials are parents with children under the age of 18 at home, marketers need to be cognizant that this leaves 53% of Millennials who are not parents. As discussed in the Millennial Worries section, companies must be mindful of that the priorities and interests of parents vs non-parents will vary greatly and marketing efforts must be positioned accordingly. Some key lifestage differences are discussed below.

FIGURE 43: ACTIVITIES ENJOYED THE MOST (ANY RANK), BY GENERATION, JUNE 2019

"Which of the following activities do you enjoy the most? Please select and rank up to three responses, with 1 being your favourite."



Base: 2,000 internet users aged 18+

Source: Lightspeed/Mintel

Motherhood defines Millennial Moms

Motherhood is a role that takes priority above all else for Millennial moms (who make up about 23% of the entire Millennial population which equates to 49% of all Millennial women). While they may feel the weight of responsibility (see Millennial Worries), it can be said that they also find family time to be rewarding, suggested with their greater inclination to rate family time as what they enjoy most. Of note, the emotional impact of parenting may be resonating more strongly with Millennial moms as they are much more inclined to rate this activity as 'most enjoyable' (at 76%) than Millennial fathers (at 55%).

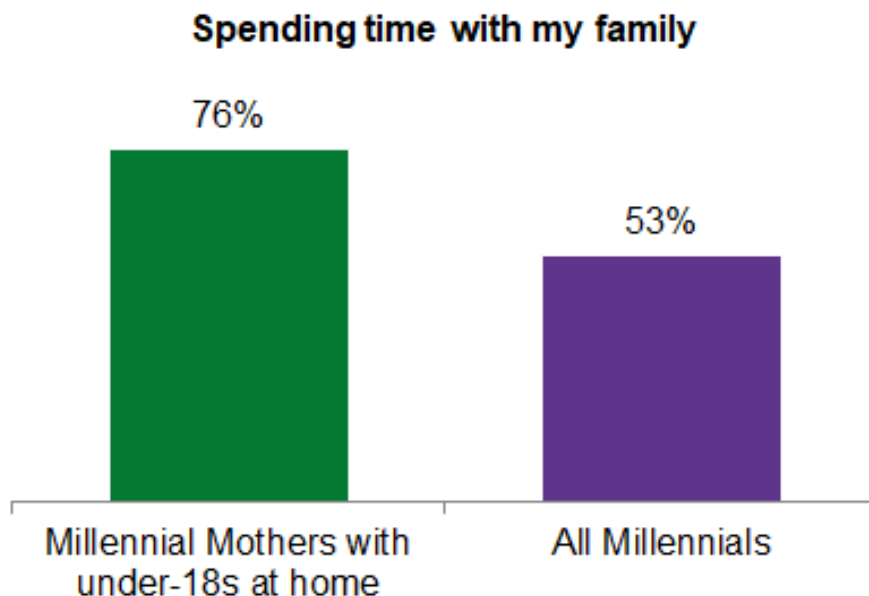
These results suggest that Millennial moms take pride in being a mom and that marketers should find ways to celebrate the role – something they may not be doing for themselves owing to the fact that moms are putting the needs of others first, at the expense of their own needs and feeling guilty when they do take time for themselves. Specifically, Millennial moms are the most inclined to be worried about keeping others happy and keeping up with responsibilities (see Millennial Worries), while also the most likely to be struggling with self-care. They are the most likely to say they often have difficulty finding 'downtime' and get enough sleep on the days they work (see *Canadian Lifestyles: The Cost of Convenience – Canada, April 2019*). Further, moms are hard on themselves; they pride themselves on being dependable and suffer from guilt when they do take time for themselves (see *Marketing to Moms – Canada, September 2018*).

Help support Millennial moms to do motherhood their way

All told, the results discussed above show that while moms really do enjoy family time, their prioritization of others is leading them to be challenged to achieve the balance of fitting themselves and their own needs into the picture. As discussed in the Perception of Current Lifestage section, parenting today may be more challenging and unique from older generations in that parents are exposed to more viewpoints on parenting

FIGURE 44: 'SPENDING TIME WITH MY FAMILY' AS ACTIVITY ENJOYED THE MOST (ANY RANK), MILLENNIAL MOTHERS VS ALL MILLENNIALS, JUNE 2019

"Which of the following activities do you enjoy the most? Please select and rank up to three responses, with 1 being your favourite."



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

than ever before thanks to the internet. To this end, Millennial moms are doing what they can and adjusting to motherhood in a way that works for them. For marketers, this means that companies need to find ways to support and celebrate motherhood in a way that works for them.

In this regard, companies are likely to benefit by finding ways to provide resources or even tips to be the best moms they can be rather than being prescriptive and telling them a particular way or viewpoint is the right/wrong one. This type of strategy aligns with Mintel Trend, *Challenge Accepted* which discusses how social media and technology expose consumers to a wide range of experiences and challenges and across all aspects. Greater exposure to more viewpoints means more flexibility to tailor choices or lifestyles – even lifestages – how one sees fit. When it comes to connecting with Millennial moms, acknowledging that mothering is challenging will likely help to bring moms a little bit of mental relief in terms of feeling guilty about not knowing what to do or even taking time

for themselves. At the same time, being able to talk about solutions with other moms should prove to be a valuable resource.

Case study on providing meaningful tools: Solly Baby

A good example of a company providing this type of support to new mothers is seen with Solly Baby -a company which sells baby wraps that allow new parents to carry their babies without using their hands. The company's website landing page (at the time of writing this Report) features a calendar directing moms to Instagram Live events that should prove helpful. Some examples include "Identity in Motherhood", prompts for moms to do things they might not normally remember to do like "Do: Take some time for yourself", and suggests activities for moms like "List: 25 things you want that you already have". The calendar also lists scheduled times where virtual consults are available to give parents a private 30- or 60-minute tutorial to teach and answer questions parents may have about using the products.

'Girls night in' grows up: catering to childless Millennial women

Unlike Millennial mothers, Millennial women who are not parents are understandably more inclined to be focused on their own interests as not only are they childless, they also skew more heavily towards being single (58%). From an activity point of view, the segment shows a balance between both social and solo time. They are the most likely to cite watching movies/shows as the most enjoyed activity, while family time and in-person time with friends tie for the second highest rated. Also, the segment is also more likely to rate 'reading for fun' as a favourite activity, further highlighting that they are indulging in their own interests.

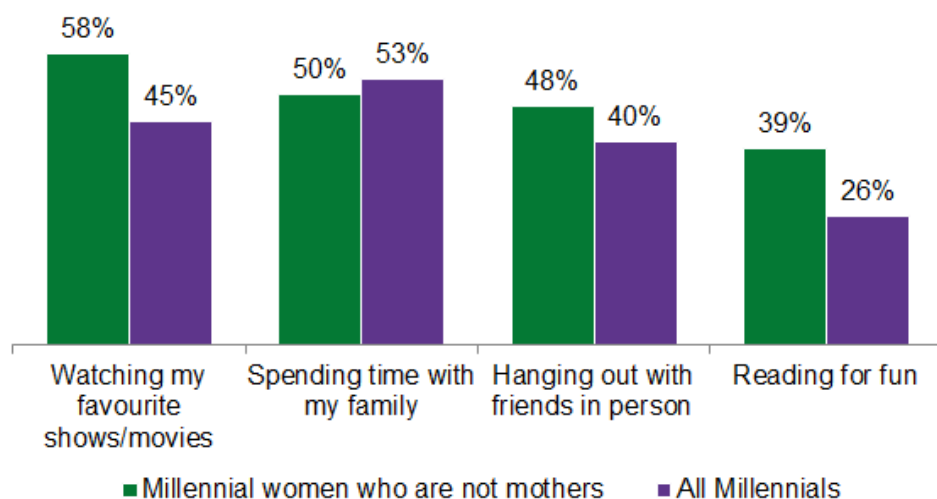
With two thirds (66%) of this segment saying they prefer staying at home vs going out, marketers are likely to benefit from finding ways to show how their products/services can help create the optimal stay-in experience. From a numbers point of view, the segment represents a sizable portion of the Millennial population, making up 26% of all Millennials or 53% of all Millennial women, meaning that efforts geared towards this audience should prove profitable. In this regard, marketers need to ensure that efforts represent the full Millennial age range as childless Millennial women are fairly evenly distributed in age (48% are between the ages of 25-32 and 52% are aged 33-42).

Make book clubs the star and products/services a supporting cast member

With four in 10 (39%) childless Millennial women being keen to read for fun and their preference for staying in vs going out, food and beverage (both alcoholic and non-alcoholic) companies and grocery retailers alike are well positioned to leverage book club gatherings as an occasion to appeal to

FIGURE 45: SELECTED ACTIVITIES ENJOYED THE MOST (ANY RANK), MILLENNIAL WOMEN WHO DO NOT HAVE UNDER-18S VS ALL MILLENNIALS, JUNE 2019

"Which of the following activities do you enjoy the most? Please select and rank up to three responses, with 1 being your favourite."



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

this audience. Of course, the notion of the book club will tap into the social element as 48% of this segment deems 'hanging out with friends in-person' as a favourite activity.

An idea to help build a link between snacks/drinks and reading may be for such companies to consider touting 'pairings' as a way to link elements of currently popular books (eg book themes, story characters, etc) with particular products. For example, a book that features a 'spicy' main character may pair well with spicy dip and a full-bodied wine.

Similarly, music streaming services may also see success featuring book clubs as an occasion. Marketing could operate in a similar manner to food/beverages, although it would be music to help set the tone and 'pair' with book themes or characters

instead of snacks or drinks. Regardless of the product/service being promoted, marketing of such combinations may see more traction if companies officially partner-up and get endorsements from authors or publishers as this may give the pairing more credibility.

Consider promoting a 'binge club' in a similar manner

As childless Millennial women are inclined to cite watching their favourite movies/shows as the activity they enjoy the most, marketers may see success by modernizing the book club and promoting a 'binge club'. The modus operandi would be akin to book clubs in that it is a group of Millennial women gathered at someone's home, but instead of being focused on reading the focus would be centred around watching shows.

Young Millennial men enjoy physical activities and video games

The enjoyment of leisure time looks different for younger Millennial men (those aged 25-32) in that physical activities and playing video games are more important to the segment and time with family and friends are much less likely to be ranked as favourite activities. While time and responsibilities undoubtedly cut into the ability of this segment to engage in these activities as they move into parenthood, it is important to recognize that the segment will likely continue to carry on participating and derive enjoyment from these activities as they grow older.

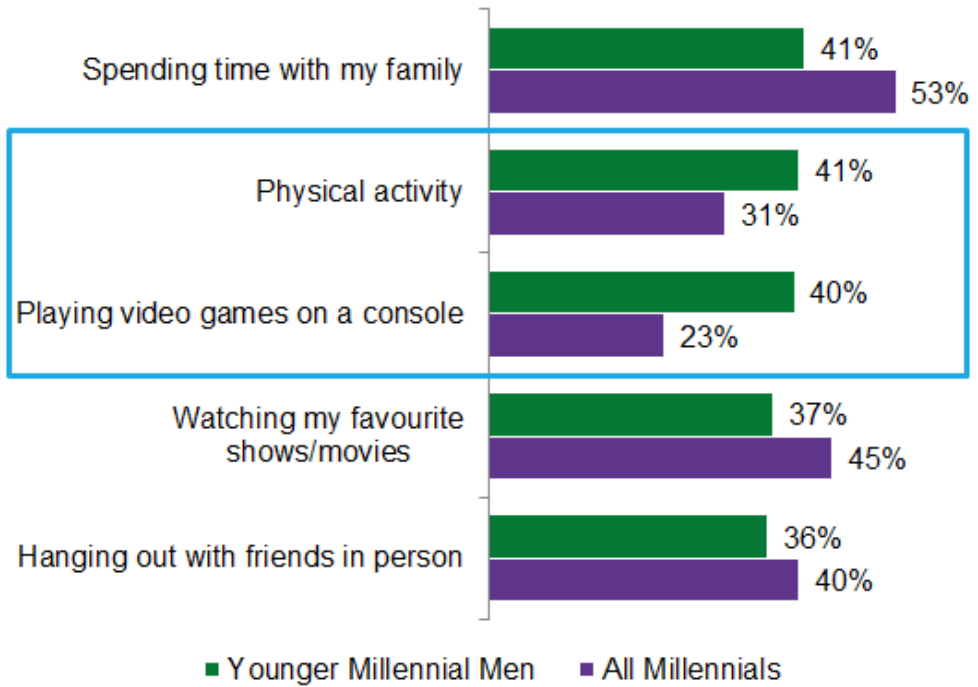
These will continue to form the basis of relaxation for men as they ‘grow up’

In particular, there is a cultural shift in gaming behaviour where playing video games is now a part of mainstream life and younger generations will include video games as a regular activity in their lives as they age. This is already evident amongst older Millennial men where 84% of those aged 35-44 say that they play video games (see *Attitudes Toward Gaming – Canada, February 2019*), and some 30% of Older Millennial Men (those aged 33-42) rate playing video games as an activity they enjoy most (see Databook).

Results from the aforementioned Report show that playing video games is more than just for fun; doing so is also a form of relaxation for 60% of those who play. Already, older Millennial men are making

FIGURE 46: SELECTED ACTIVITIES ENJOYED THE MOST (ANY RANK), YOUNG MILLENNIAL MEN VS ALL MILLENNIALS, JUNE 2019

“Which of the following activities do you enjoy the most? Please select and rank up to three responses, with 1 being your favourite.”



Base: 650 internet users aged 25-42
Source: Lightspeed/Mintel

time in their day to play video games (55% of men aged 35-44 per the aforementioned Report). As such, marketers will likely see gains by showcasing gaming as a regular part of decompressing or stress relief after work for men. As discussed in Mintel Trend, *Redefining Adulthood* the concept of what it means to be an adult has

changed beyond recognition, and people are adapting to lives that don't fit the mold. This is yet another area where Millennials differ from older generations – gaming was seen as something more for kids, but this is something that is normal and can even become a shared activity between them and their children as they age.

The Impact of Tech on Interactions

In some ways, more tech means more problems for Millennials

Communication preferences of Millennials are more like Gen Z

When it comes to the way Millennials interact with others, the generation may be more like Gen Z than older generations – yet another differentiation point that will separate them as parents than the generations of parents before them. In particular, they are much more likely to show a preference for sending a text than talking over the phone and posting their real selves on social media than older generations.

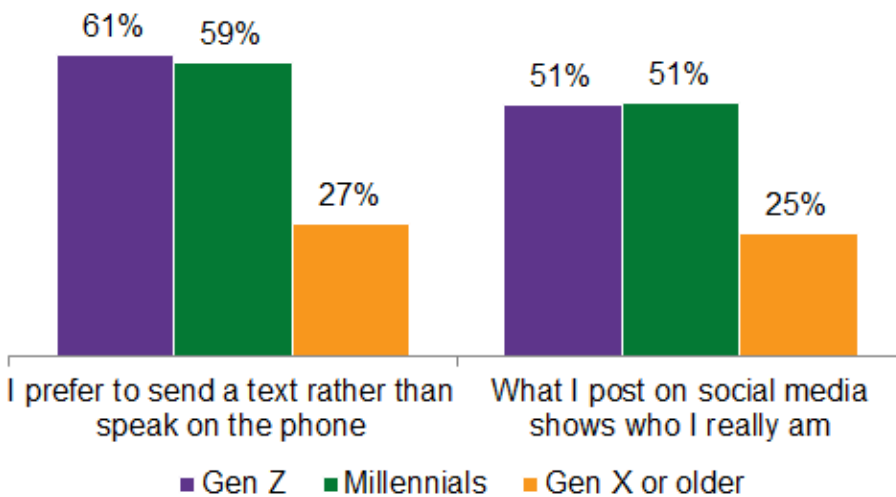
While these results should not be a surprise for anyone, it does imply that Millennial expectations for how businesses leverage tech to connect with consumers will also be more closely aligned with the more tech savvy Gen Z than older generations.

As are the perceived consequences of using tech to interact with others

Mintel Trend, *On Display* discusses how living in this digital age is creating an environment where everyone (including brands) is on display and the effects of this are that people are increasingly competing for attention and exposure, which is leaving nobody safe from scrutiny and backlash. This trend holds true for Millennials as the data shows that living lives online does come with these exact consequences for the generation. With half (51%) of Millennials saying that what they post on social media reflects who they really are, the exposure is also leaving the generation to be more likely than those older than them to be comparing their lives to others and feeling isolated and judged and at the same time.

FIGURE 47: ATTITUDES TOWARDS COMMUNICATING WITH TECH (% ANY AGREE), BY GENERATION, JUNE 2019

"How much do you agree or disagree with the following statements?"

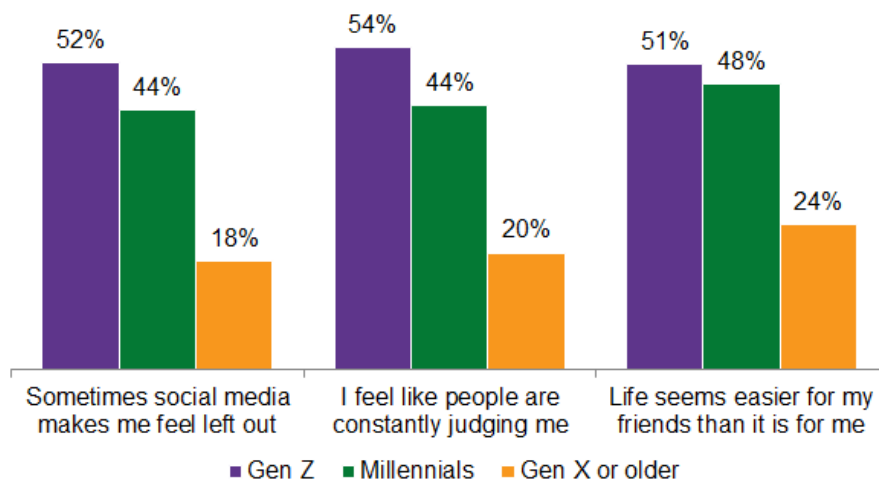


Base: 2,000 internet users aged 18+

Source: Lightspeed/Mintel

FIGURE 48: ATTITUDES TOWARDS THE IMPACT OF COMMUNICATING WITH TECH (% ANY AGREE), BY GENERATION, JUNE 2019

"How much do you agree or disagree with the following statements?"



Base: 2,000 internet users aged 18+

Source: Lightspeed/Mintel

But, the pressure to balance online and in-person interactions likely ring stronger for Millennials

Although Millennials behave similarly to Gen Z in terms of using tech to communicate with others, there is one key difference in their orientation towards technology: where Gen Z has grown up with technology practically from the day they were born, this was not the case when Millennials were growing up. As 25-42s did not experience childhood with iPhones in hand (which first launched in 2007), they are more likely to feel the pressure to 'switch off' and make an effort to disconnect from technology.

The pressure to do so may be even further enhanced given that many are moving into parenthood where use of tech isn't always seen as aligning well with family time. This is seen with only 32% of dads and 24% of moms who agree with the statement 'if members of my family are on their own electronic devices in the same room, it counts as family time' (see *Marketing to Parents – Canada, September 2016*).

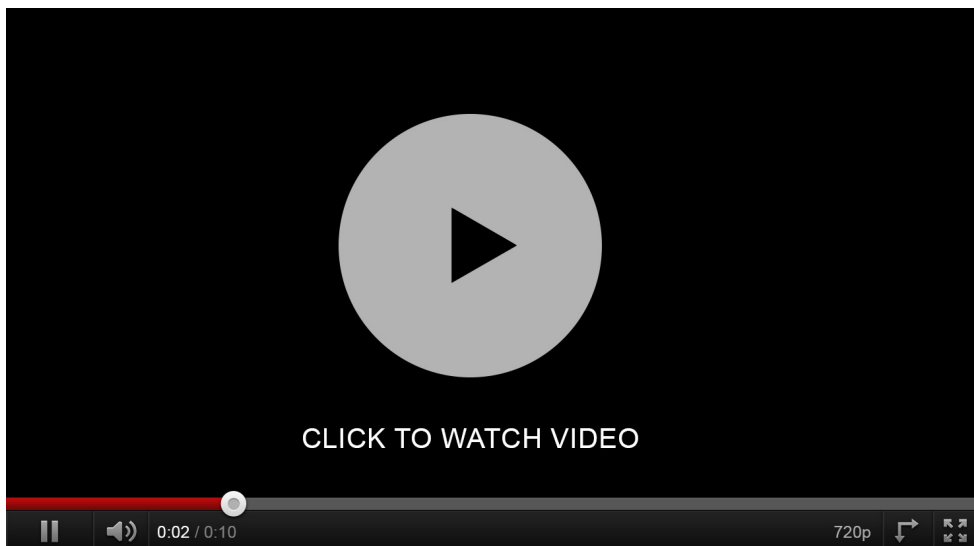
Connect with Millennials by encouraging them to disconnect (momentarily, anyway)

For companies, the negative consequences felt by Millennials due to tech usage as a medium of communication suggests a need to encourage the segment to literally switch off their devices – if even for a short while.

Case studies on promoting some healthy competition: Hotel Bellora and IKEA

Efforts in this vein have been seen globally. In May 2019, Hotel Bellora in Sweden hosted a competition called 'The Check Out Suite' to give away a free stay provided

FIGURE 49: ANUNCIO RUAVIEJA 2018 – TENEMOS QUE VERNOS MÁS, NOVEMBER 2018



Source: YouTube – Ruavieja/Mintel

guests didn't use the internet. The hotel had installed a screen-free lamp with light technology to detect internet connection. The lamp switched to red after 30 minutes spent on a screen. This indicated that the full price for the room had been reached. The less the guests browsed the internet, the cheaper the rate would be. If no internet was used then guests could stay for free.

In March 2019, IKEA had initiated a 'phone detox challenge' in China to encourage consumers to put their phones down and make the most of their time with family and friends during Chinese New Year. The competition worked such that users would first access the digital store via WeChat. From there, they select an IKEA product in the app that they would like to order. Instead of a price tag, each product has a "time tag" attached to it. Once users have selected a product and accepted the challenge, a countdown starts on their screens and all

they need to do is to stay away from their phones for the duration required to win a reward. People were expected to stay away from their phones for half an hour or more depending on the value of the product.

Case study on promoting reminders of time limits: Pernod Ricard

In November 2018, alcoholic beverage company, Pernod Ricard, released an emotional four minute video which follows relatives' and friends' reactions to learning how much time they will spend together before they die. While the calculation is based on a simple algorithm that uses their current level of engagement, their reactions raise awareness of how little time we spend with each other compared to how much time we spend on devices and screens. The campaign was created to prompt people to spend more time with loved ones.

Millennial dads feel like they're getting the short end of the stick

Where it would be expected that younger Millennials are more likely to be putting their lives on display on social media, the results from this Report are surprising in that it is Millennial parents who are more likely to say what they post on social media reflects who they really are. This is unexpected as parents tend to skew older (66% of Millennials with under-18s at home parents are older Millennials – ie aged 33-42). Where having the visual measuring stick is leading Millennial Moms to put pressure on themselves to do it all (see Millennial Worries), Millennial dads are feeling that they've got it tougher than their peers.

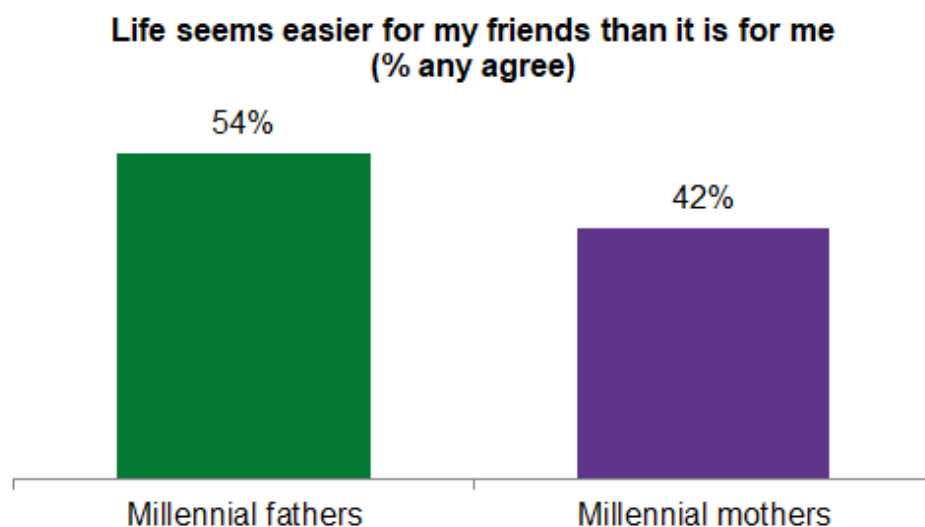
Expectations are clearly depicted for Millennial dads, and the bar can be high

As discussed in the Perception of Current Lifestage section, parenting today (ie for Millennials) literally looks different than it did for older generations in two ways. First, the rise of households being led by two full-time working parents is leading to the expectation (or at least a greater aspiration towards) of more equal participation in managing both household chores and childcare – ie the greater contribution of men in both areas. Secondly, reliance on social media means that today's parents literally have these expectations, or at least some version of a happy household, being shown to them.

In the marketplace, the image of the dad in ads has swayed from portraying them as the joker or a goofy character to one where they are much more present and happily contributing to household tasks and childcare. Pampers' 'Stinky Booty' campaign is a good example of this where John Legend along with three other fathers are shown singing to their children while they change their diaper. In the reboot, 'Stinky Booty Duty 2.0' campaign, the variety of dads featured in the ad expands to show an even wider range of fathers with their children.

FIGURE 50: "LIFE SEEMS EASIER FOR MY FRIENDS THAN FOR ME" (% ANY AGREE), MILLENNIAL FATHERS VS ALL MILLENNIALS, JUNE 2019

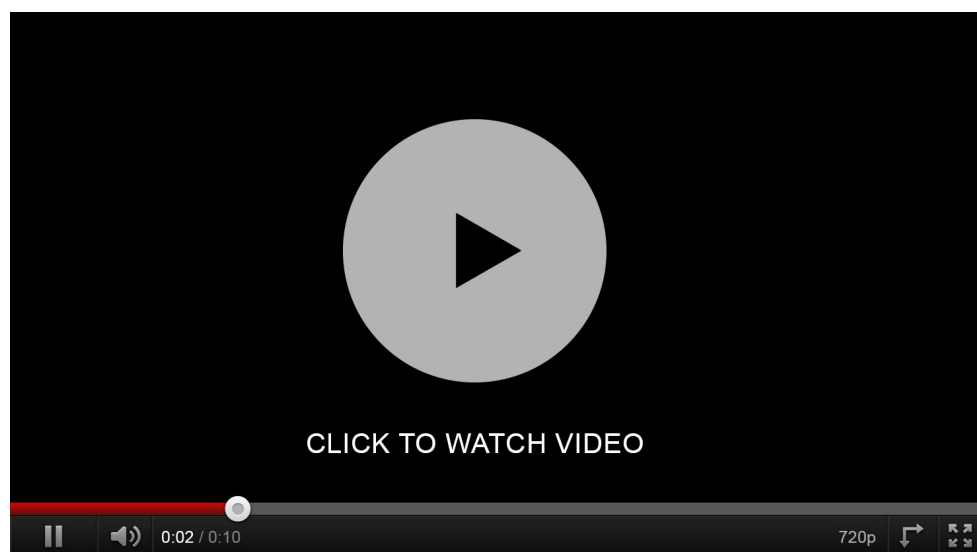
"How much do you agree or disagree with the following statements?"



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

FIGURE 51: JOHN LEGEND'S "STINKY BOOTY" SONG WITH PAMPERS, JUNE 2018



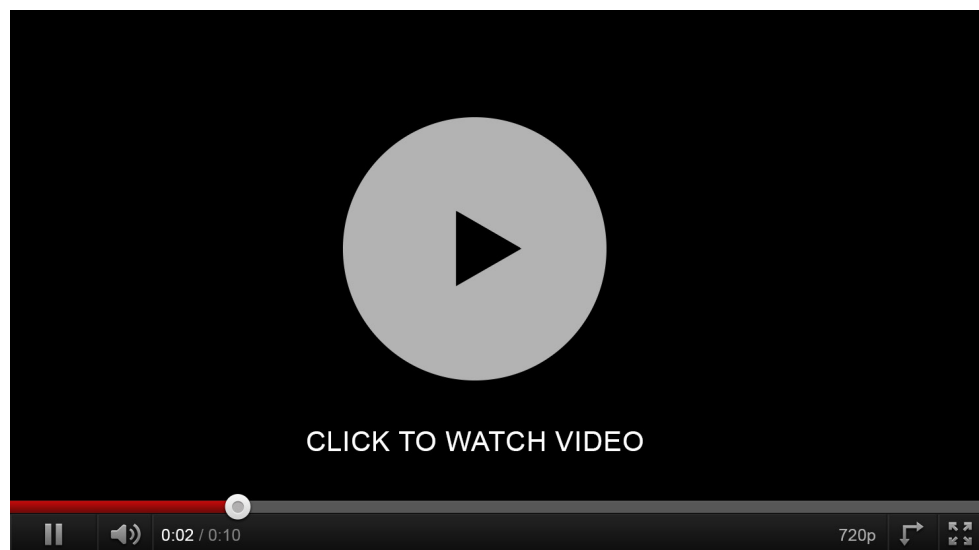
Source: YouTube – Pampers/Mintel

While the shift in media portrayals of dads has been a positive one, it may also be setting the bar which may feel daunting to some fathers. At the time of writing, new or expecting dads may be feeling even more pressure in light of media attention and marketing surrounding changing parental leave policies. Dove Men+Care's #TakeTheTime campaign is a good example of this. For example, its 5 Dads 5 Weeks ad features five different fathers talking about the rewards of taking parental leave in light of Canada's five-week EI (Employment Insurance) Parental Sharing Benefit that is available as a 'use it or lose it' benefit top-up when both parents agree to share parental leave.

Like with moms, help dads choose their own adventure

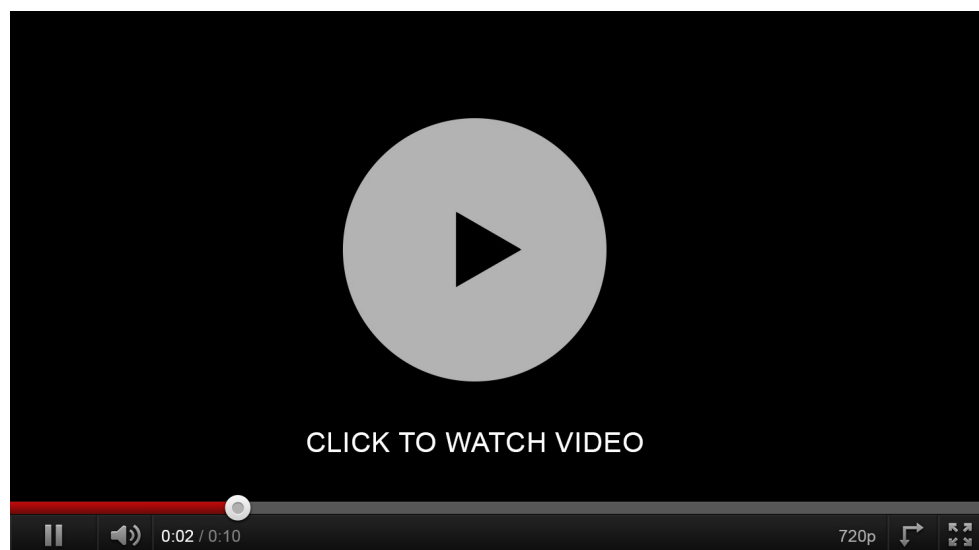
Similar to the suggestion for connecting with Millennial moms (see Favourite Activities), companies will likely see greater traction connecting with dads by providing resources, tips and tools to best support them – particularly as consumers are exposed to multiple viewpoints of how an 'ideal' dad/mom is supposed to behave. Like moms, dads would do well with more conversations about what it means to be a dad in today's environment and have some flexibility in terms of being able to pick and choose what the path of fatherhood/ motherhood looks like.

FIGURE 52: PAMPERS, ADAM LEVINE, JOHN LEGEND AND CHRISSY TEIGEN STAR IN "STINKY BOOTY DUTY 2.0", FEBRUARY 2019



Source: YouTube – Pampers/Mintel

FIGURE 53: #TAKETHETIME | 5 DADS. 5 WEEKS. | DOVE MEN+CARE, MAY 2019



Source: YouTube – DoveMenCanada/Mintel

Connecting with Millennial Values

Brands are a part of the Millennial identity

Companies would do well to be mindful of the image they portray as some Millennials see brands as an extension of their outward image (51% feel that the brands they use reinforce the image they want to portray). As brands are representative of who they are, it follows that a good portion (62%) feel invested in brand values and care about brands representing their personal values.

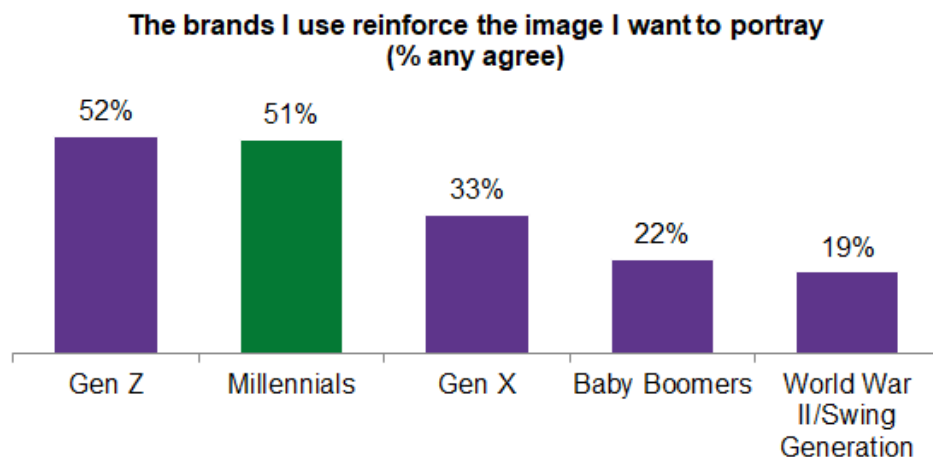
Millennials are more aligned with Gen Z in this respect than with older generations, suggesting that young adults today will more likely be shopping with their values in mind than ever before. As such, connecting with young adults today means that brands need to step up and be clear about their moral or ethical stance on issues and clearly communicate how they address or support these positions.

It's time to take a stand

Consumers affiliating themselves with companies that share their cultural and ideological values is a concept that is discussed in Mintel Trend, *Buydeology*. The idea that consumers are shopping with their morals means that brands must put themselves on the line and take an ideological stake in the ground to engage their target consumers. While it must be acknowledged that doing so can alienate those who oppose the chosen positioning, not taking a stand can have a similar adverse effect and potentially generate its own backlash by alienating consumers completely.

FIGURE 54: "THE BRANDS I USE REINFORCE THE IMAGE I WANT TO PORTRAY" (% ANY AGREE), BY GENERATION, JUNE 2019

"How much do you agree or disagree with the following statements?"

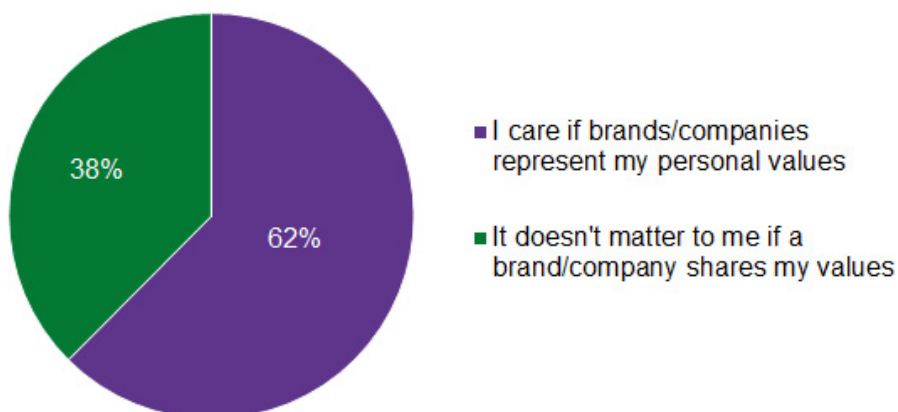


Base: 2,000 internet users aged 18+

Source: Lightspeed/Mintel

FIGURE 55: MILLENNIAL ATTITUDES TOWARD BRANDS REPRESENTING VALUES, JUNE 2019

"Which of the following statements about brands/products best apply to you? Please select the most applicable in each pair of statements."



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

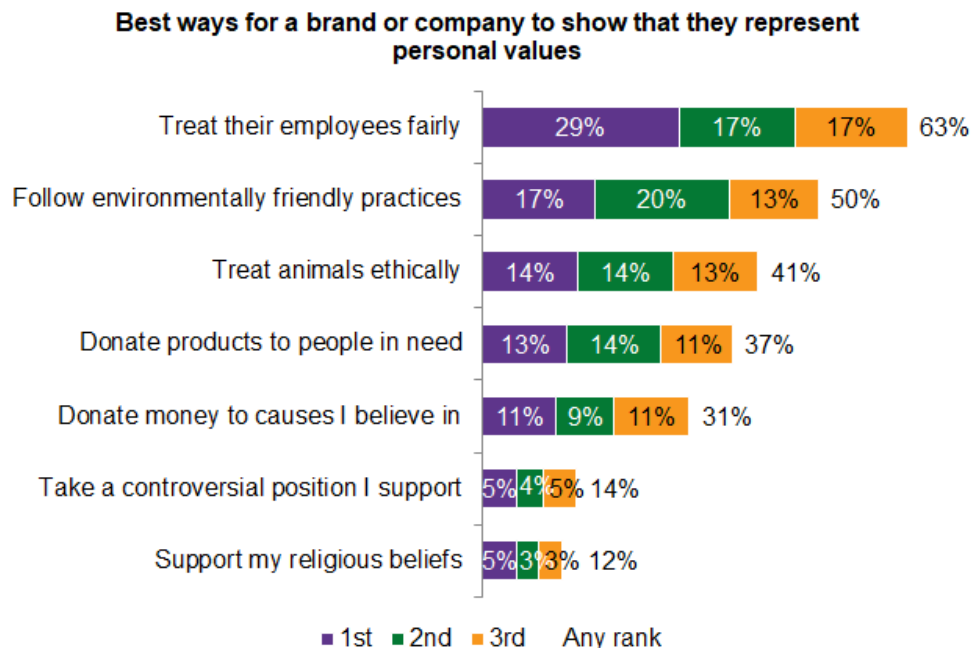
Nike's chose Colin Kaepernick, the quarterback who had 'taken the knee' in protest of systemic racism during the US National Anthem in September 2018, as one of its newest spokespersons. This was a tactical and highly calculated risk taken by the company. Although the company was aware it would cause controversy and distance some consumers, the company was taking a bet on a new generation of socially conscious young males. According to Comperemedia Insight, Nike Bets on Values-Based Marketing, Nike was aware that young males with disposable income were its most engaged audience and that the company understood how its corporate values aligned with the demographics of its core audience. In taking this stance, Nike benefitted from a long-standing history of provocative advertising that has worked to keep the brand culturally relevant.

Millennials expect companies to walk their talk

There is a sense that Millennials expect companies to 'walk the walk' as they would not only like to see companies just talk about supporting social or environmental causes, but they're keen to see companies actually take steps towards addressing these issues – and from within the organization itself. When it comes to contributing to people in need or causes they believe in, Millennials would much rather see evidence of companies treating their employees fairly or that the company is finding ways to be more environmentally friendly. In other words, there is an expectation that companies will do more than just create marketing campaigns targeting the causes they care about but instead, address these issues starting with themselves.

FIGURE 56: MILLENNIAL RANKING OF BEST WAYS FOR BRANDS TO REPRESENT THEIR VALUES, JUNE 2019

"Which of the following are the best ways for a brand or company to show that they represent your personal values? Please select and rank up to three responses, with 1 being best."



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

Employment fairness strikes a personal chord for Millennials

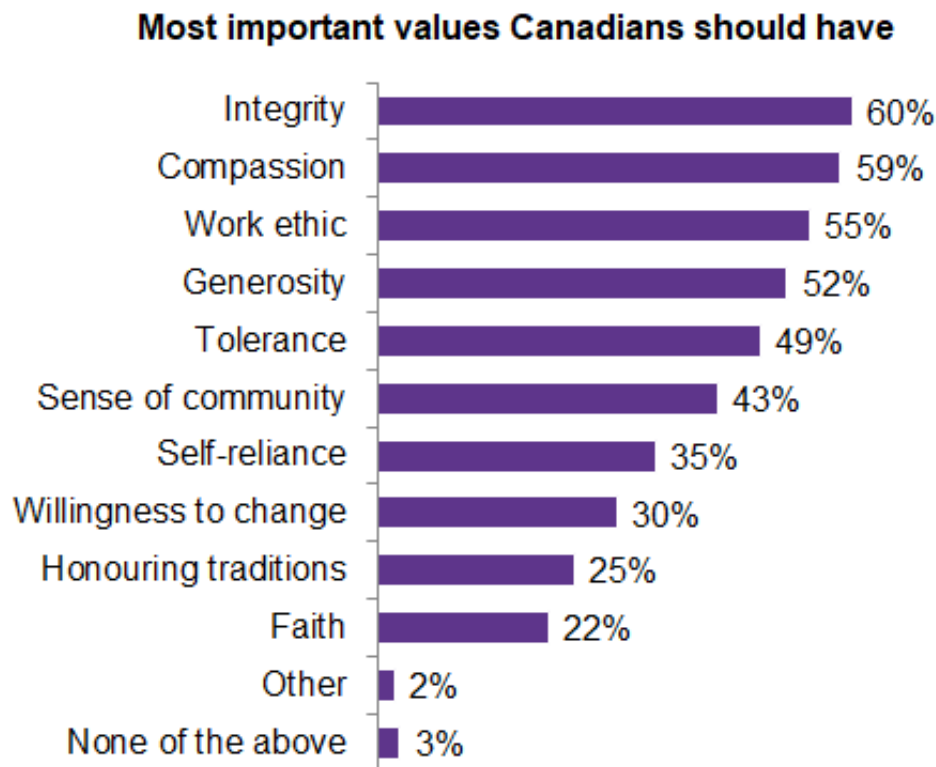
Millennial expectation that companies walk the walk and make changes from the inside out likely resonate with the generation on two different levels; first being the values that Millennials take pride in and see as defining the Canadian population, and second relating to the lifestage that they are in.

From a values point of view, Millennials rate integrity and compassion as the top two most important values Canadians should have showing that they expect others to be honest and more morally upright, as well as hold a degree of sympathy and concern for others. By extension, it is likely that they will also hold these expectations of companies. From a lifestage point of view, Millennials are settling into their careers – to the point where they see it as defining their generation (see Perception of Current Lifestage) and are more focused on financial goals than older generations (see Today's Millennial Lifestage). As they are working hard towards ensuring success in the future and work is a key part of attaining success, employment conditions in workplaces are likely to have a more personal connection for the generation.

All told, brands targeting Millennials will likely benefit from highlighting its commitment to employment fairness across all levels of the organization and/or partnerships with supply companies that are positively attentive to this area.

FIGURE 57: MILLENNIAL RANKING OF THE MOST IMPORTANT VALUES CANADIANS SHOULD HAVE, JUNE 2019

"What do you think are the five most important values Canadians should have? Please select up to five."



Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

APPENDIX



Data Sources and Abbreviations

Data sources

Consumer survey data

For the purposes of this Report, Mintel commissioned exclusive consumer research through Lightspeed to examine the attitudes and behaviours of Millennial Canadians towards. Mintel was responsible for the survey design, data analysis and reporting. Fieldwork was conducted in June 2019 among a sample of 2,000 adults aged 18+ with access to the internet.

Mintel selects survey respondents by gender, age, household income and region so that they are proportionally representative of the Canadian adult population using the internet. Mintel also slightly oversamples, relative to the population, respondents who are Chinese Canadian to ensure an adequate representation of these groups in the survey results. Please note that Mintel surveys are conducted online and in English and French.

Consumer qualitative research

In addition to quantitative consumer research, Mintel also conducted an online discussion group among a demographically mixed group of adults aged 18+. This discussion group was asynchronous (ie not run in real time), functioning like a blog or bulletin board, with questions remaining posted for a predetermined period of time. This method allows participants to respond reflectively, at their leisure, or to log off to think about any issues raised and return later to respond. Participants were recruited from Lightspeed's online consumer panel with responses collected in July 2019. Relevant quotes are included verbatim, and as such, include typos and other grammatical errors as they originally appeared.

Correspondence analysis

Correspondence analysis is a statistical visualisation method for picturing the associations within and between rows (eg attributes,

attitudes) and columns (eg brands, products, segments,) of a two-way contingency table. It is generally used to display information in a complex crosstab (eg attitudes related to a certain product or attributes consumers associate with a brand) in a joint space that is easy to understand by simply interpreting proximities. The significance of the relationship between a brand, for instance, and its associated attribute is measured using the Chi-square test.

There are two types of maps produced as a result of a correspondence analysis. Across both types of maps, generally the further away a data point is from the centre of the map, the more differentiating it is. The symmetrical map shows the relationship between row and column data points. The angle formed by drawing a line from a row data point to the centre of the map and back out to a column data point indicates the relationship between the two. Positive relationships are shown by smaller angles, while negative relationships are shown by larger angles. In the principal map, relationships between data points within rows and columns are analyzed by their proximity to each other. Row data points (eg attributes) that are have similar response patterns are found closer together on the map, as are column data points (eg brands) that are more similar to each other.

Abbreviations

The following is a list of abbreviations used in this Report.

CAD	Canadian Dollar
EI	Employment Insurance
NBA	National Basketball Association
PC	President's Choice
PFM	Personal Finance Management
QR	Quick Response
US	United States
USD	United States Dollar

FIGURE 58: GENERATIONAL PERSPECTIVES, JUNE 2019

"Which of the following are the best ways for a brand or company to show that they represent your personal values? Please select and rank up to three responses, with 1 being best."

	Teenagers	Young adults (early 20s)	Millennials (late 20s/30s)	Gen Xers (40s/ early 50s)	Baby Boomers (mid 50s through early 70s)
	%	%	%	%	%
Cool	21	19	16	11	11
Creative	30	30	28	15	11
Annoying	26	12	12	8	9
Community-focused	8	16	18	25	26
Happy	24	25	24	29	28
Career-focused	7	32	46	38	14
Family-focused	6	10	31	50	44
Wealthy	7	7	10	25	36
Lazy	32	19	12	6	6
Out of touch with reality	36	25	14	10	17
Self-centred	40	33	24	14	14
None of the above	10	10	9	10	13

Base: 650 internet users aged 25-42

Source: Lightspeed/Mintel

Terms

Generations, if discussed within this Report, are defined as:

World War II/Swing Generation	Members of the WWII generation were born in 1932 or before and are aged 87 or older in 2019. Members of the Swing Generation were born between 1933 and 1945 and are aged 74-86 in 2019.
Baby Boomers	The generation born between 1946 and 1964. In 2019, Baby Boomers are between the ages of 55 and 73.
Generation X	The generation born between 1965 and 1976. In 2019, are between the ages of 43 and 54.
Millennials	The generation born between 1977 and 1994. In 2019, Millennials are between the ages of 25 and 42.
Generation Z	The generation born between 1995 and 2007. In 2019, are between the ages of 12 and 24.
Emerging Generation	The newest generation began in 2008 as the annual number of births declined sharply with the recession. In 2019 members of this as-yet unnamed generation are younger than age 12.

Perception of financial health situations, if discussed within this Report, are defined as:

Healthy	Have money left at the end of the month for a few luxuries or to add to savings
OK	Get by, but there's not a lot left by the time the basics are taken care of
Tight	Making ends meet, but only just
Struggling	In danger of falling behind with bills or loan repayments
In trouble	Missed loan repayments or household bills

RESEARCH METHODOLOGY



Canada Research Methodology

Mintel is an independent market analysis company that prides itself on supplying objective information on a whole range of markets and marketing issues.

There are six main sources of research that are used in the compilation of Mintel reports:

- Consumer research
- Social media research
- Desk research
- Trade research
- Statistical forecasting

Mintel reports are written and managed by analysts with experience in the relevant markets.

Consumer research

Exclusive and original quantitative consumer research is commissioned for almost all Mintel reports. In addition, qualitative research is also undertaken for a large proportion of reports in the form of online discussion groups. Mintel invests a considerable sum each year in consumer research, and the purchaser of a Mintel report benefits, as the price of an individual report is less than the cost of the original research alone. The research brings an up-to-date and unique insight into topical issues of importance.

Consumer research is conducted among a nationally representative sample of internet users in Canada and is carried out by Lightspeed. The results are only available in Mintel reports. Note that Mintel's exclusive research is conducted online in both English and French.

Starting in July 2017, Mintel's consumer research has been conducted using a device agnostic platform for online surveys (ie respondents can now take surveys from a smartphone in addition to a computer or tablet). This methodology change may result in data differences from previous years; any trending should be done with caution.

Sampling

Online Surveys

Lightspeed

Founded in 1996, Lightspeed's double opt-in U.S. online consumer panel contains approximately 1.27 million U.S. consumers. Lightspeed recruits its panelists through many different sources including web advertising, permission-based databases and partner-recruited panels.

Note: Lightspeed GMI was re-branded as Lightspeed in September 2016.

Mintel sets quotas on age and gender, region, and household income. Specific quotas for a sample of 2,000 adults aged 18+ are shown below.

Please note: these quotas are only representative of a standard General Population survey sample of 2,000 internet users aged 18+. Sample size, targets, and quotas may vary per report. Please see the Report Appendix for further details.

Age groups by gender	%	N
Male, 18-24	8.1%	161
Male, 25-34	10.3%	205
Male, 35-44	8.1%	161
Male, 45-54	8.6%	172
Male, 55-64	7.6%	153
Male, 65+	7.4%	148

Female, 18-24	6.1%	121
Female, 25-34	8.4%	168
Female, 35-44	9.0%	181
Female, 45-54	8.7%	175
Female, 55-64	9.6%	192
Female, 65+	8.2%	163
Total	100	2,000

Region	%	N
Ontario	39.5%	789
Quebec	23.3%	466
British Columbia	12.7%	254
Alberta	11.8%	236
Saskatchewan	2.7%	53
Manitoba	3.7%	74
Atlantic Provinces (New Brunswick, Newfoundland/Labrador, Nova Scotia, Prince Edward Island)	6.4%	128
Total*	100	2,000

*Mintel does not include rural regions such as the Yukon or the Northwest Territories (including Nunavut) in its research. Thus the consumer research data does not reflect opinions and behaviours of the population living in those areas.

Household income	%	N
Less than \$25,000	14.0	281
\$25,000 - \$49,999	20.8	416
\$50,000 - \$69,999	15.0	300
\$70,000 - \$99,999	17.8	356
\$100,000 and over	32.4	647
Total	100	2,000

Secondary Data Analysis

In addition to exclusively commissioned surveys, Mintel gathers syndicated data from other respected consumer research firms. This allows Mintel analysts to form objective and cohesive analyses of consumer attitudes and behaviours.

Qualitative Research

Recollective

Recollective provides Mintel with online qualitative research software. This allows the creation of Internet-based, 'virtual' venues where participants recruited from Mintel's online surveys gather and engage in interactive, text-based discussions led by Mintel moderators.

Further Analysis

Mintel employs numerous quantitative data analysis techniques to enhance the value of our consumer research. The techniques used vary from one report to another. Below describes some of the more commonly used techniques.

Repertoire Analysis

This is used to create consumer groups based on reported behaviour or attitudes. Consumer responses of the same value (or list of values) across a list of survey items are tallied into a single variable. The repertoire variable summarises the number of occurrences in which the value or values appear among a list of survey items. For example, a repertoire of brand purchasing might produce groups of those that purchase 1-2 brands, 3-4 brands and 5 or more brands. Each subgroup should be large enough (ie N=75+) to analyse.

Cluster Analysis

This technique assigns a set of individual people in to groups called clusters on the basis of one or more question responses, so that respondents within the same cluster are in some sense closer or more similar to one another than to respondents that were grouped into a different cluster.

Correspondence Analysis

This is a statistical visualisation method for picturing the associations between rows (image, attitudes) and columns (brands, products, segments, etc.) of a two-way contingency table. It allows us to display brand images (and/or consumer attitudes towards brands) related to each brand covered in this survey in a joint space that is easy to understand. The significance of the relationship between a brand and its associated image is measured using the Chi-square test. If two brands have similar response patterns regarding their perceived images, they are assigned similar scores on underlying dimensions and will then be displayed close to each other in the perceptual map.

CHAID analysis

CHAID (Chi-squared Automatic Interaction Detection), a type of decision tree analysis, is used to highlight key target groups in a sample by identifying which sub-groups are more likely to show a particular characteristic. This analysis subdivides the sample into a series of subgroups that share similar characteristics towards a specific response variable and allows us to identify which combinations have the highest response rates for the target variable. It is commonly used to understand and visualise the relationship between a variable of interest such as "interest in trying a new product" and other characteristics of the sample, such as demographic composition.

Key Driver Analysis

Key driver analysis can be a useful tool in helping to prioritise focus between different factors which may impact key performance indicators (eg satisfaction, likelihood to switch providers, likelihood to recommend a brand, etc). Using correlations analysis or regression analysis we can get an understanding of which factors or attributes of a market have the strongest association or "link" with a positive performance on key performance indicators (KPIs). Hence, we are able to identify which factors or attributes are relatively more critical in a market category compared to others and ensures that often limited resources can be allocated to focusing on the main market drivers.

TURF Analysis

TURF (Total Unduplicated Reach & Frequency) analysis identifies the mix of features, attributes, or messages that will attract the largest number of unique respondents. It is typically used when the number of features or attributes must be or should be limited, but the goal is still to reach the widest possible audience. By identifying the Total Unduplicated Reach, it is possible to maximize the number of people who find one or more of their preferred features or attributes in the product line. The resulting output from TURF is additive, with each additional feature increasing total reach. The chart is read from left to right, with each arrow indicating the incremental change in total reach when adding a new feature. The final bar represents the maximum reach of the total population when all shown features are offered.

Social Media Research

To complement its exclusive consumer research, Mintel tracks and analyses social media data for inclusion in selected reports. Using Infegy's Atlas software, Mintel 'listens in' on online conversations across a range of social platforms including Facebook, Twitter, consumer forums and the wider web.

Atlas provides rich consumer insight via the analysis of commentary posted publicly on the internet. The system performs comprehensive and broad collection of data from millions of internet sources, working to ensure a faithful and extensive sampling of feedback from the widest range of individuals. The dataset contains commentary posted in real time, as well as a substantial archive dating back through 2007.

Trade research

Informal

Trade research is undertaken for all reports. This involves contacting relevant players in the trade, not only to gain information concerning their own operations, but also to obtain explanations and views of the strategic issues pertinent to the market being researched. Such is Mintel's concern

with accuracy that draft copies of reports are sent to industry representatives, to get their feedback and avoid any misrepresentation of the market. These comments are incorporated into reports prior to final publication.

Formal

Internally, Mintel's analysts undertake extensive trade interviews with selected key experts in the field for the majority of reports. The purpose of these interviews is to assess key issues in the market place in order to ensure that any research undertaken takes these into account.

In addition, using experienced external researchers, trade research is undertaken for some reports. This takes the form of full trade interview questionnaires and direct quotes are included in the report and analysed by experts in the field. This gives a valuable insight into a range of trade views of topical issues.

Desk research

Mintel has an internal team of market analysts who monitor: government statistics, consumer and trade association statistics, manufacturer sponsored reports, annual company reports and accounts, directories, press articles from around the world and online databases. The latter are extracted from hundreds of publications and websites, both Canada and overseas. All information is cross-referenced for immediate access.

Data from other published sources are the latest available at the time of writing the report.

This information is supplemented by an extensive library of Mintel's reports produced since 1972 globally and added to each year by the 500+ reports which are produced annually.

In addition to in-house sources, researchers also occasionally use outside libraries such as Statistics Canada and the Canadian Grocer. Other information is also gathered from store and exhibition visits across Canada, as well as using other databases within the Mintel Group, such as the Global New Product Database (GNPD), which monitors FMCG sales promotions.

All analysts have access to Mintel's Market Size and Macroeconomic Databases – a database containing many areas of consumer spending and retail sales as well as macroeconomic and demographic factors which impinge on consumer spending patterns..

The database is used in conjunction with an SPSS forecasting program which uses weighted historical correlations of market dynamics, with independent variables, to produce future spending scenarios.

Statistical Forecasting

Statistical modelling

For the majority of reports, Mintel produces five-year forecasts based on an advanced statistical technique known as 'multivariate time series auto-regression' using the statistical software package SPSS.

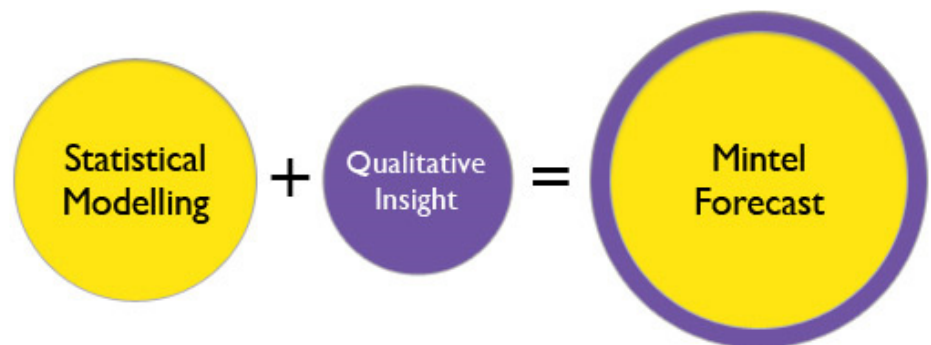
Historical market size data feeding into each forecast are collated in Mintel's own market size database and supplemented by macro- and socio-economic data sourced from organisations such as Statistics Canada, The Bank of Canada, The Conference Board of Canada and the Economist Intelligence Unit.

Within the forecasting process, the model searches for, and analyses relationships between, actual market sizes and a selection of key economic and demographic factors (independent variables) in order to identify those predictors having the most influence on the market.

Factors used in a forecast are stated in the relevant report section alongside an interpretation of their role in explaining the development in demand for the product or market in question.

Qualitative insight

At Mintel we understand that historic data is limited in its capacity to act as the only force behind the future state of markets. Thus, rich qualitative insights from industry experts regarding past and future events that may impact the market play a crucial role in our post statistical modeling evaluation process.



As a result, the Mintel forecast allows for additional factors or market conditions outside of the capacity of the data analysis to impact the market forecast model, using a rigorous statistical process complemented by in-depth market knowledge and expertise.

The Mintel fan chart

Forecasts of future economic outcomes are always subject to uncertainty. In order to raise awareness amongst our clients and to illustrate this uncertainty, Mintel has introduced a new way of displaying market size forecasts in the form of a fan-chart.

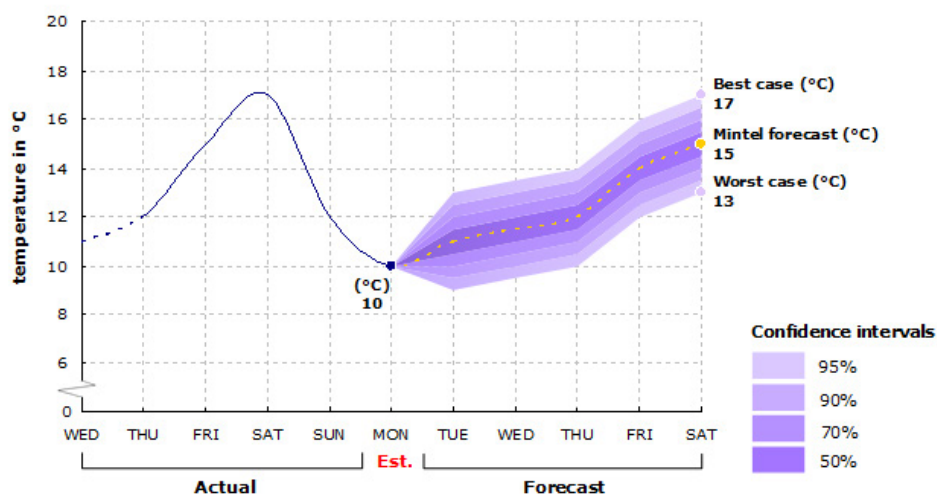
Next to historical market sizes and a current year estimate, the fan chart illustrates the probability of various outcomes for the market value/volume over the next five years.

At a 95% confidence interval, we are saying that 95 out of 100 times the forecast will

fall within these outer limits, which we call the best and worst case forecasts. These, based on the statistically driven forecast, are the highest (best case) and lowest (worst case) market sizes the market is expected to achieve.

Over the next five years, the widening bands successively show the developments that occur within 95%, 90%, 70% and 50% probability intervals. Statistical processes predict the central forecast to fall within the darker shaded area which illustrates 50% probability, i.e. a 5 in 10 chance.

A general conclusion: Based on our current knowledge of given historic market size data as well as projections for key macro- and socio-economic measures that were used to create the forecast, we can assume that in 95% of the time the actual market size will fall within the purple shaded fan. In 5% of all cases this model might not be correct due to random errors and the actual market size will fall out of these boundaries.



Weather analogy

To illustrate uncertainty in forecasting in an everyday example, let us assume the following weather forecast was produced based on the meteorologists' current knowledge of the previous weather condition during the last few days, atmospheric observations, incoming weather fronts etc.

Now, how accurate is this forecast and how certain can we be that the temperature on Saturday will indeed be 15°C?

To state that *the temperature in central London on Saturday will rise to exactly 15°C* is possible but one can't be 100% certain about that fact.

To say *the temperature on Saturday will be between 13°C and 17°C* is a broader statement and much more probable.

In general, we can say that based on the existing statistical model, one can be 95% certain that the temperature on Saturday will be between 13°C and 17°C, and respectively 50% certain it will be between about 14.5°C and 15.5°C. Again, only in 5% of all cases this model might not be correct due to random errors and the actual temperature on Saturday will fall out of these boundaries and thus will be below 13°C or above 17°C.

(To learn more about uncertainty in weather forecasts visit: <http://research.metoffice.gov.uk/research/nwp/ensemble/uncertainty.html>)

Disclaimer

Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at

<http://www.mintel.com/legal>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

Published by Mintel Group Ltd

www.mintel.com

email: info@mintel.com

Help desk

UK	+44 (0) 20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
Japan	+81 (3) 5456 5605
China	+86 (21) 6386 6609
Singapore	+65 6653 3600
India	+91 22 4090 7217

© 2019 Mintel Group Ltd. All rights reserved.
Confidential to Mintel.

