



# Gen Z

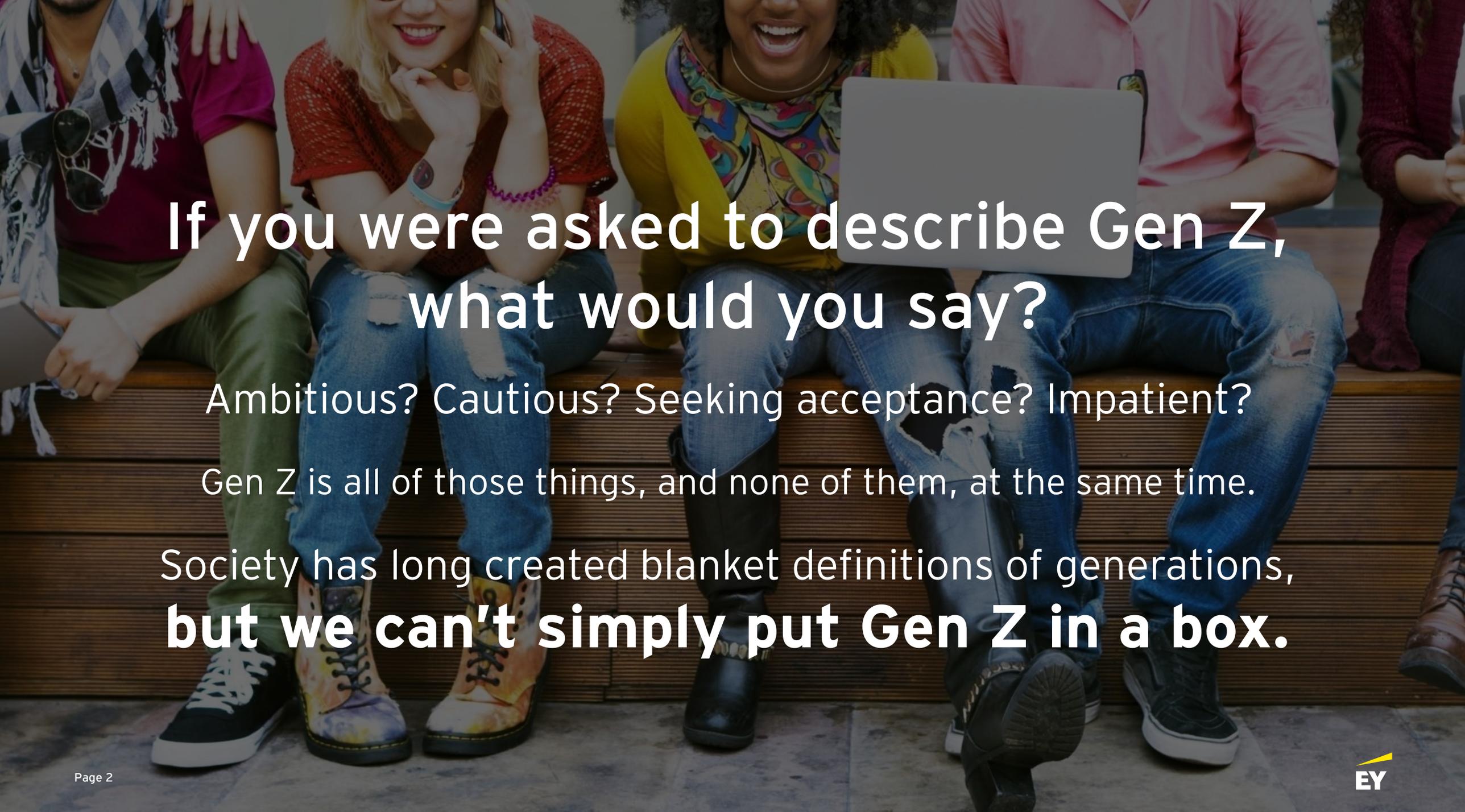
A generation of contradiction

Generation Z Segmentation Study  
Top-line findings

January 2020



Building a better  
working world



If you were asked to describe Gen Z,  
what would you say?

Ambitious? Cautious? Seeking acceptance? Impatient?

Gen Z is all of those things, and none of them, at the same time.

Society has long created blanket definitions of generations,  
**but we can't simply put Gen Z in a box.**

# Gen Z was raised on a new set of rules.

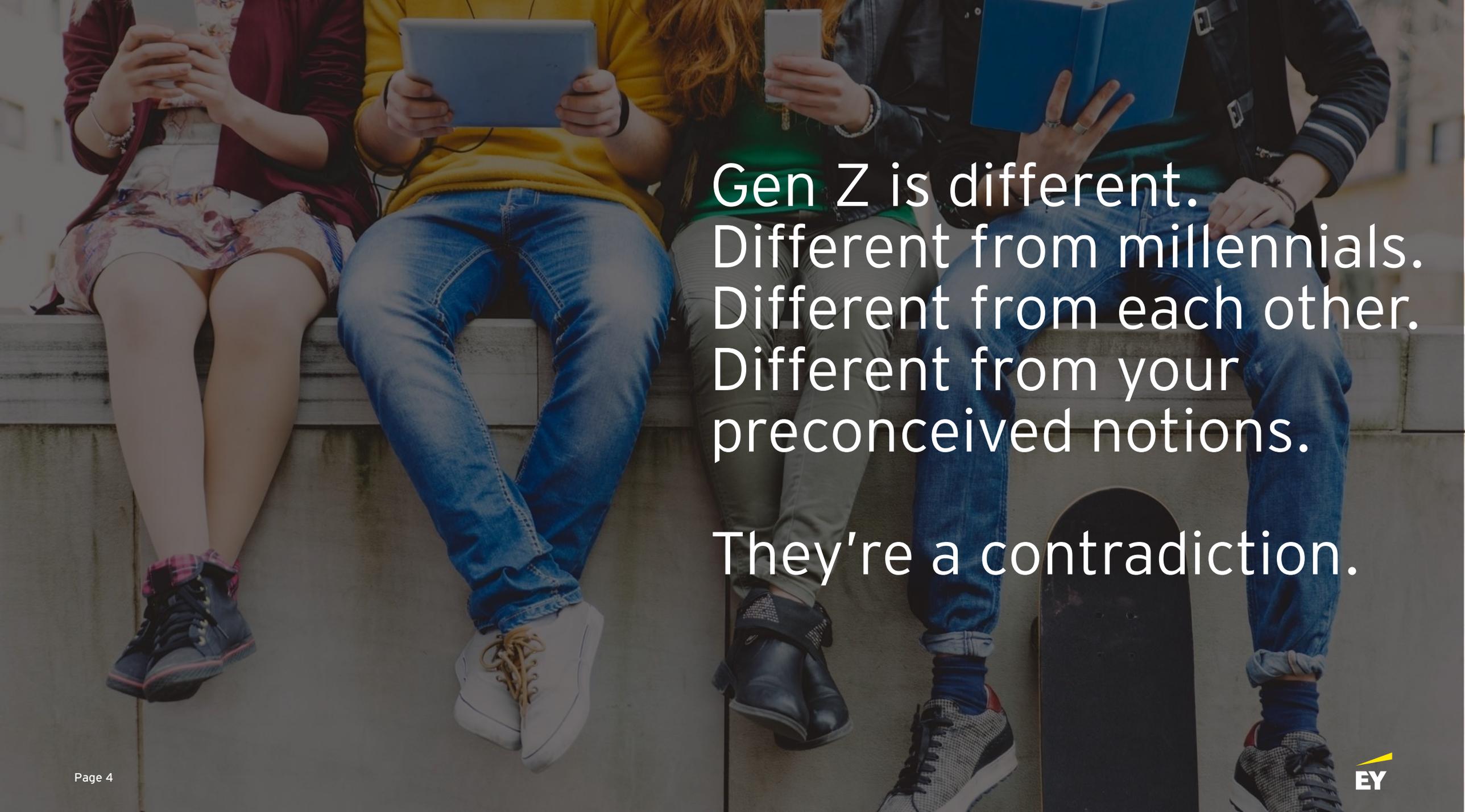
Gen Z was born into an era of tectonic societal shifts that took the US from exuberance to angst. Columbine and 9/11 brought fear and war home, and the Great Recession rocked the country and America's collective psyche.

At the same time, emerging technologies, such as the smartphone and 4G connectivity, gave Gen Z immediate access to a world of information, as well as a front-row seat to the turbulence and uneasiness that's become our new norm. The ultra-protective helicopter parents of the millennial generation were shunned in favor of a coachlike-mentality, focused on developing the generation that followed into independent, problem-solvers who could fend for themselves.

The culmination of these changes and the intense pressure Gen Z has faced in their youth created a diverse group of burgeoning adults different from any generation we've seen before.

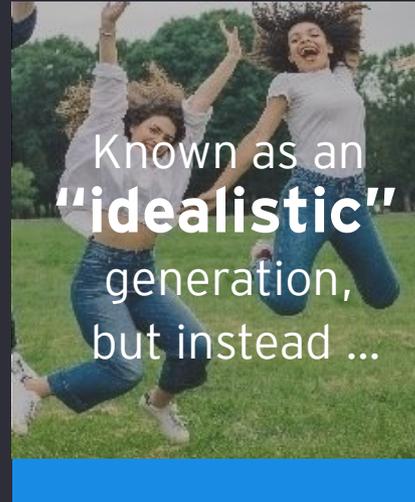
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Ernst & Young LLP surveyed a representative sample of 2,054 US teens and young adults aged 12 to 22. The survey questionnaire was completed online in English from July 12, 2019 through August 7, 2019. Statistical weights were calculated and used to confirm the sample resembled the US population. Parental consent was obtained prior to interviewing young adults aged 12 to 17.

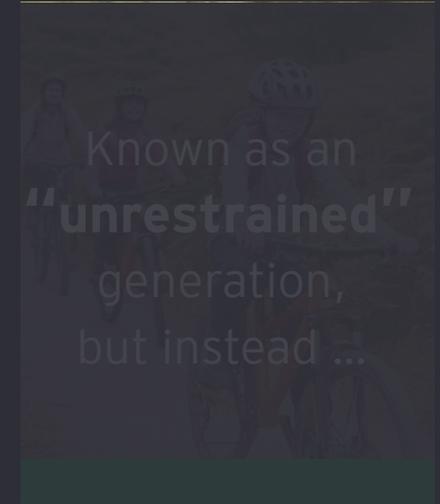
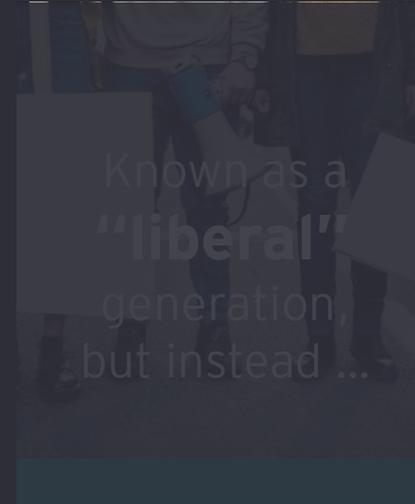
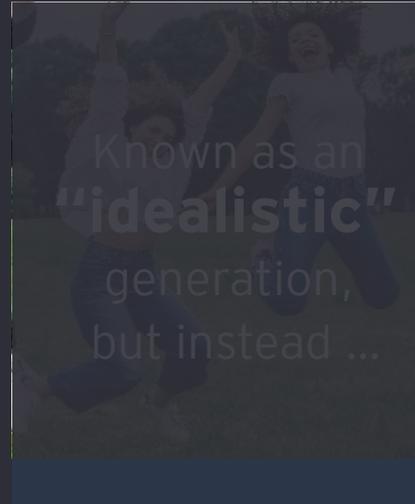


Gen Z is different.  
Different from millennials.  
Different from each other.  
Different from your  
preconceived notions.  
They're a contradiction.

# What are Gen Z contradictions?

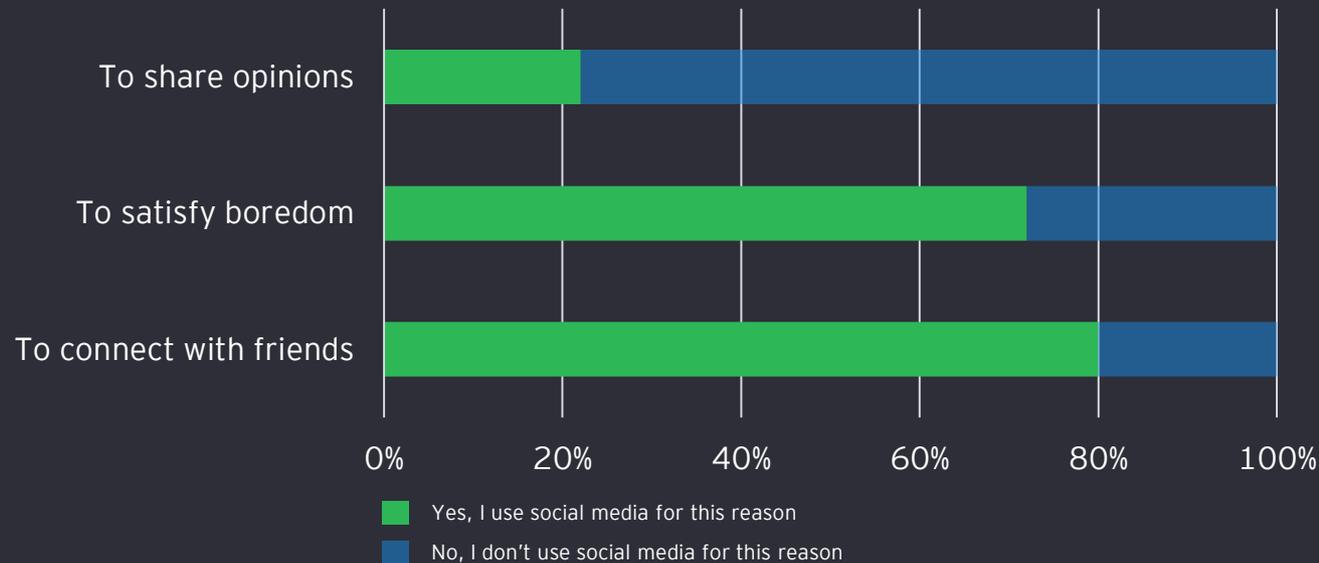


# What are Gen Z contradictions?



# ... their social media intent has shifted from previous generations.

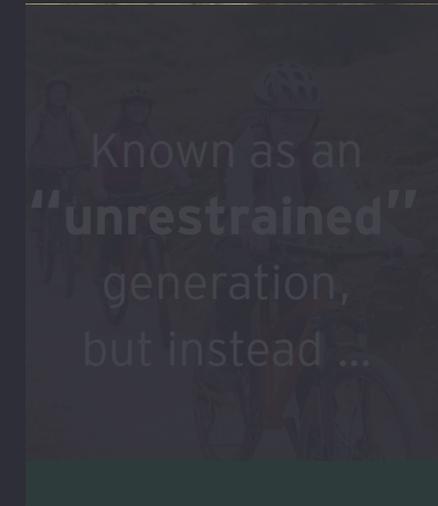
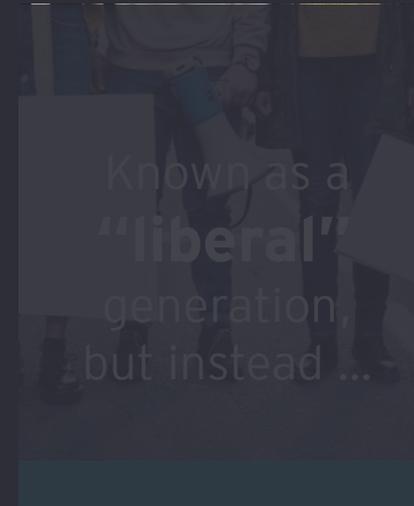
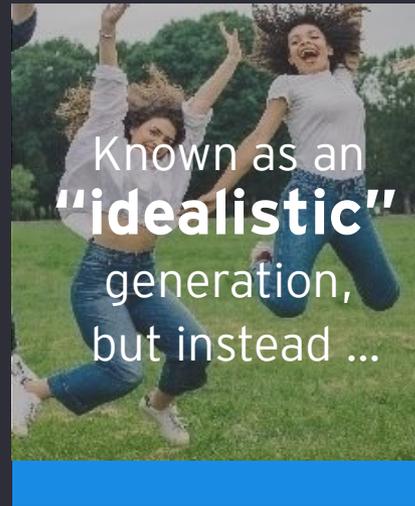
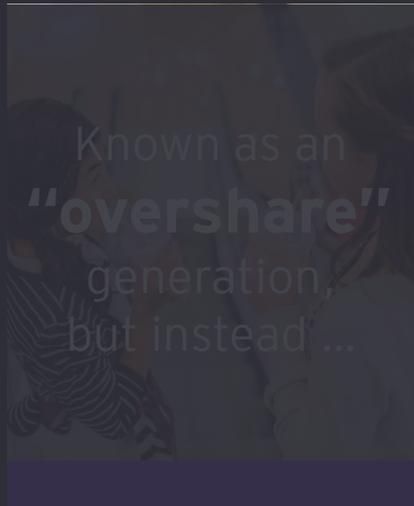
Gen Z uses social media to stay connected more so than for boundless sharing or self-promotion. That contradicts today's "social media is king" mentality.



Gen Z has embraced technology's omnipresence but still highly values human interaction.

Q: What are the top three reasons you use social media? (n=1,724)

# What are Gen Z contradictions?



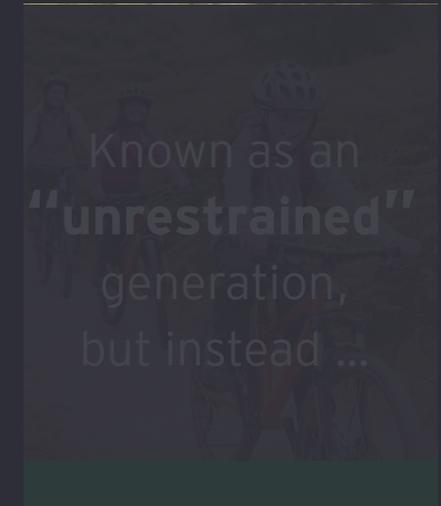
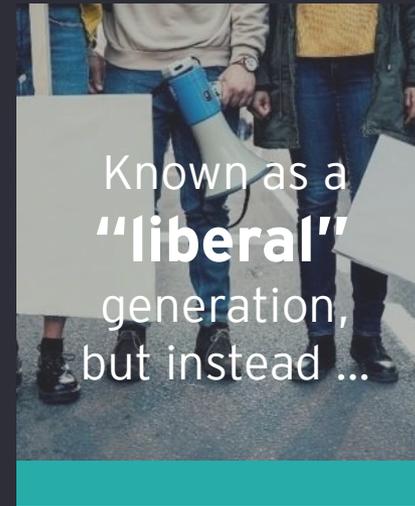
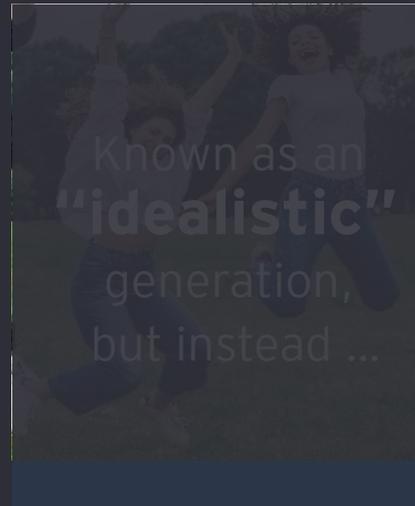
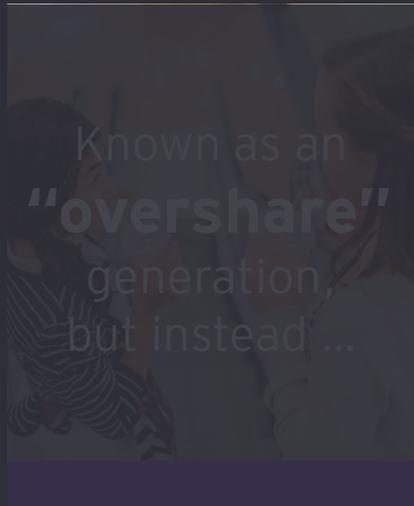
... their top priorities are more pragmatic – money, career and safety are top concerns



That contradicts society's perceptions of Gen Z's goals and priorities. Gen Z prioritizes "doing" and preparing for the future over dreaming about it.

Q: How stressed or worried do you feel about each of the following? [Scale: Not at all worried; Somewhat worried; Moderately worried; Very worried; Extremely worried] (average n=2,033)

# What are Gen Z contradictions?

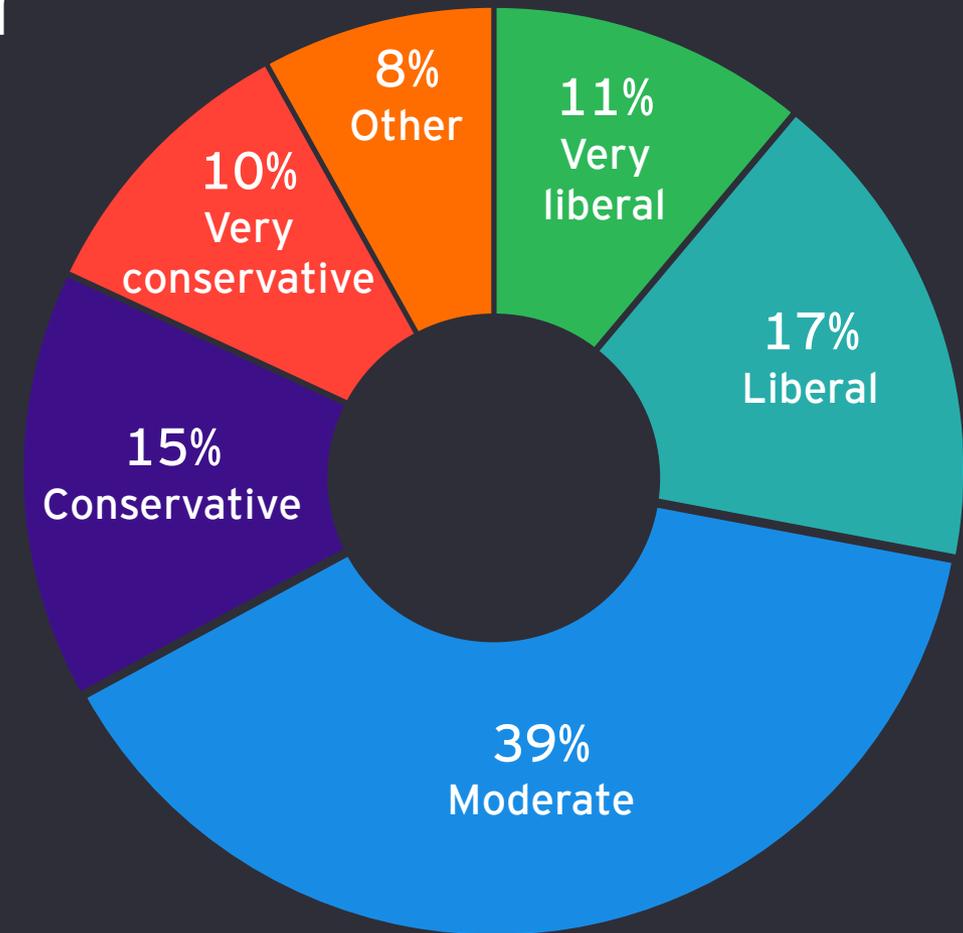


... they actually span the range of the political spectrum, reflecting broader America in their views.

Gen Z is not composed of only far-left activists. Instead, Gen Z reflects America in the diversity of its political views.

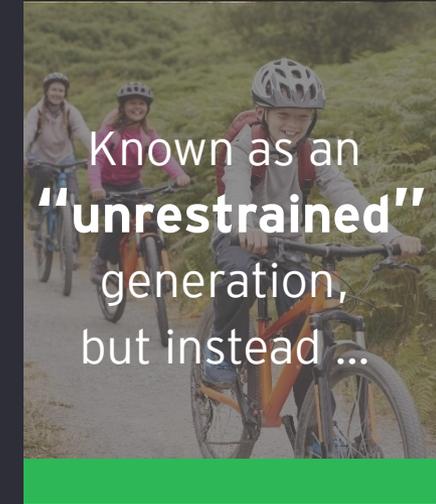
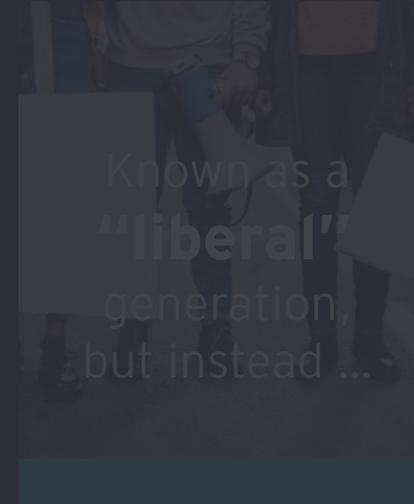
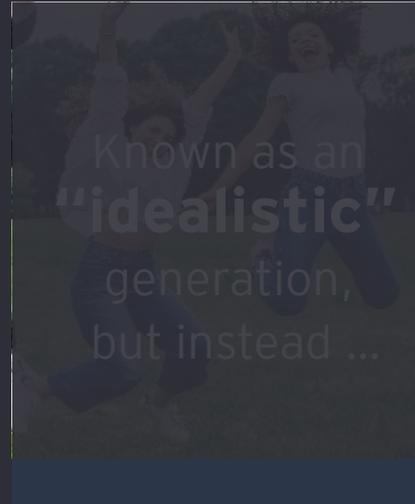
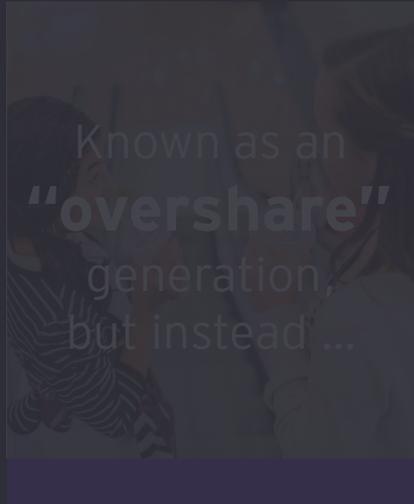
Politics isn't top of mind though: only 20% indicated that they were "very or extremely interested" in political issues vs. 39% being "very or extremely interested" in environmental issues.

For Gen Z, social causes and political affiliations don't align as neatly as they have with past generations.



Q: How would you describe your political views – very conservative, conservative, moderate, liberal or very liberal? (n=2,026)

# What are Gen Z contradictions?



... their strong values make it hard to gain their trust.

**67%** of Gen Z say that **people cannot be trusted.**

Transparency is the first step toward establishing deep bonds with this generation. Companies must be forthright about motivation and purpose to gain Gen Z's trust.

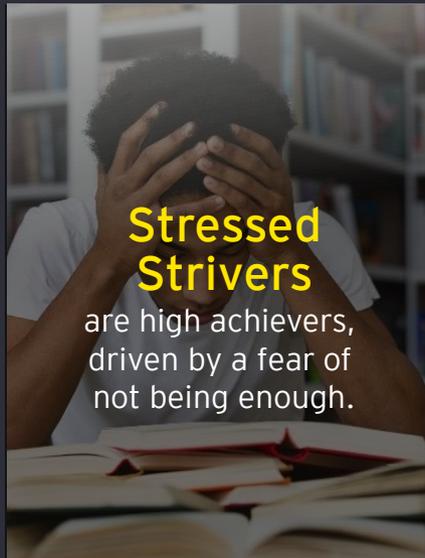
Q: Would you say that most people can be trusted or that you can't be too careful in dealing with people? (n=2,046)



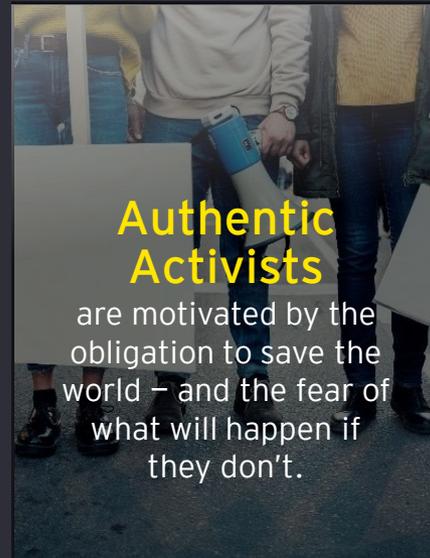
Society has long created blanket definitions of generations. While it is tempting to generalize, we must instead understand the environment that created them and how they emerged, fully distinct, from the generation that preceded them, millennials.

# Five types of Gen Z

In our research, we identified five types of Gen Z – all with different motivations, goals, priorities and dreams.



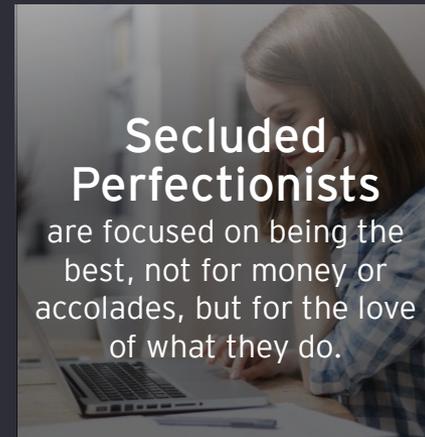
**Stressed Strivers**  
are high achievers, driven by a fear of not being enough.



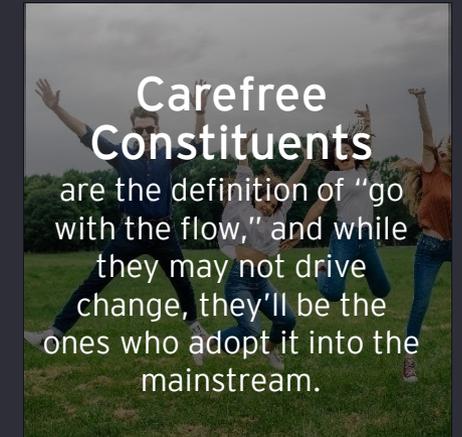
**Authentic Activists**  
are motivated by the obligation to save the world – and the fear of what will happen if they don't.



**Big Plans, Low Energy**  
expect to do well and make money, but aren't necessarily willing to put in the effort.



**Secluded Perfectionists**  
are focused on being the best, not for money or accolades, but for the love of what they do.

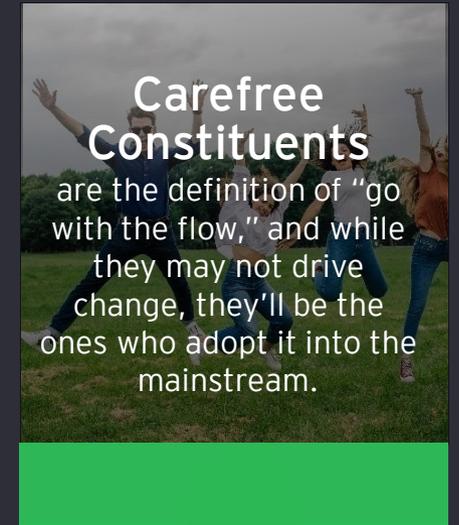
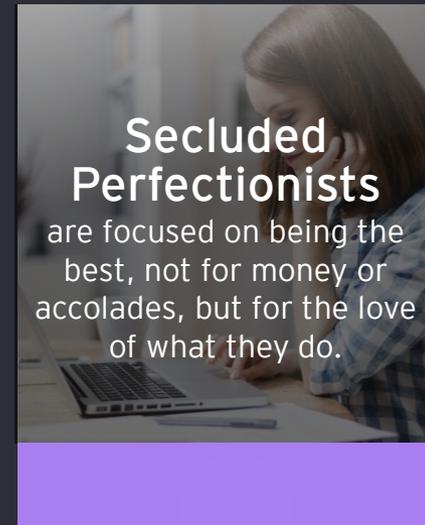
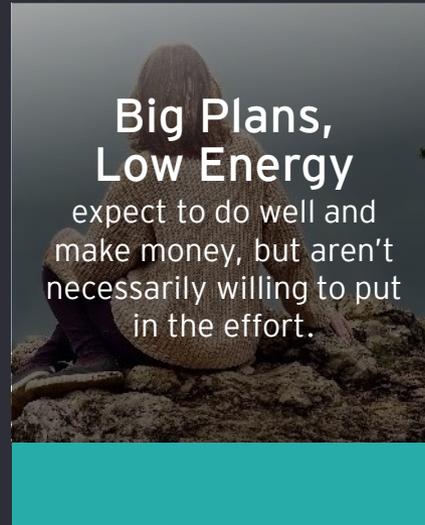
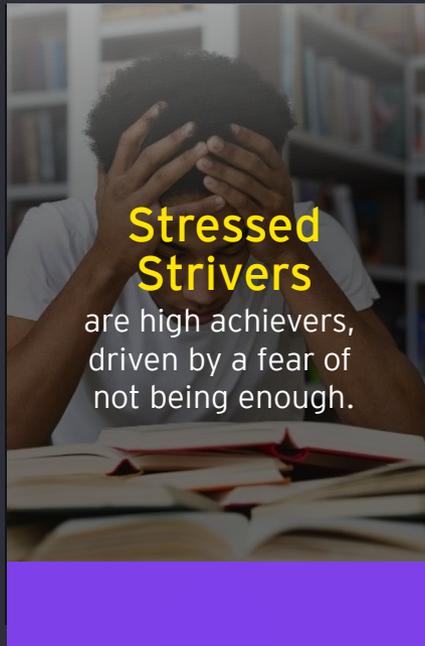


**Carefree Constituents**  
are the definition of “go with the flow,” and while they may not drive change, they’ll be the ones who adopt it into the mainstream.



# Five types of Gen Z

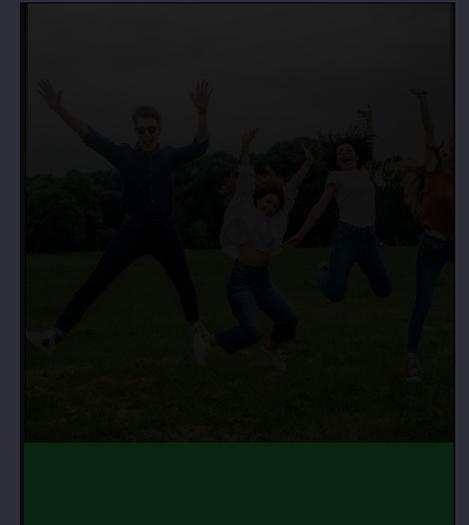
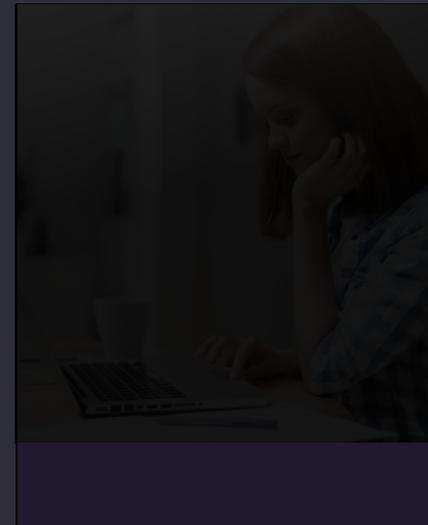
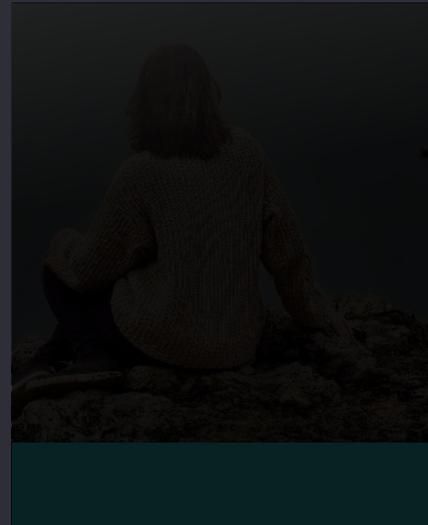
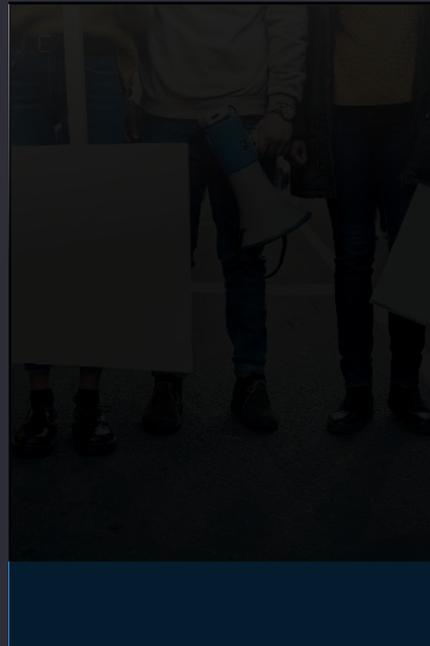
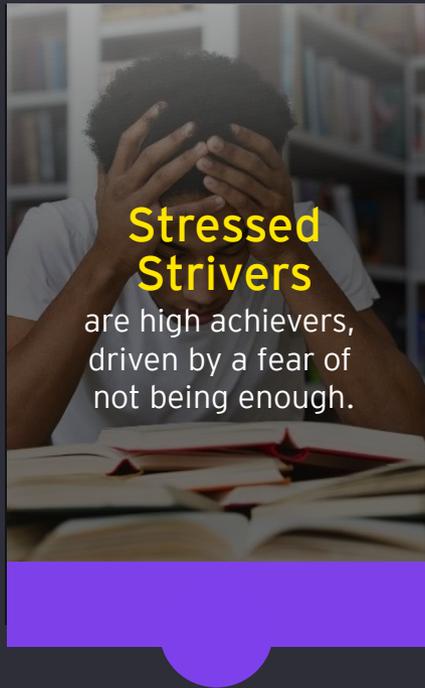
In our research, we identified five types of Gen Z – all with different motivations, goals, priorities and dreams.



These two segments drive much of the perception of Gen Z because they're the most outspoken and care the most about what others think. But there are other, less vocal but equally important segments that make up the diverse Gen Z landscape.

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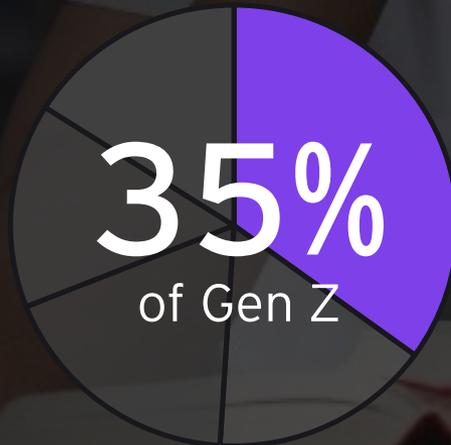
# Stressed Strivers

The largest group of Gen Z, Stressed Strivers, is driven by an internal fear of not being enough.

Despite having supportive parents who value their children’s happiness, Stressed Strivers are driven by a need to live up to the expectations set by our overproductive world. Stressed Strivers are known to set big goals for themselves and are willing to stress themselves out in their drive to achieve them.

Winning companies, leaders and institutions will challenge them and proactively recognize their value, while helping them discover the boundaries that are needed for a healthy life.

Key qualities
Independent
Anxious
Future-focused



Key segmentation variables	Compared with others
Job: want to enjoy their work	Under-indexes
Job: want a job that others respect/admire	Over-indexes
Importance of spending time on things that will help you in the future	Over-indexes
Stressed	Over-indexes
Job: want to be the best	Over-indexes
Importance of being independent and figuring things out on your own	Over-indexes
Importance of earning what you get (instead of it being given to you)	Over-indexes
Interested in environmental issues	Over-indexes

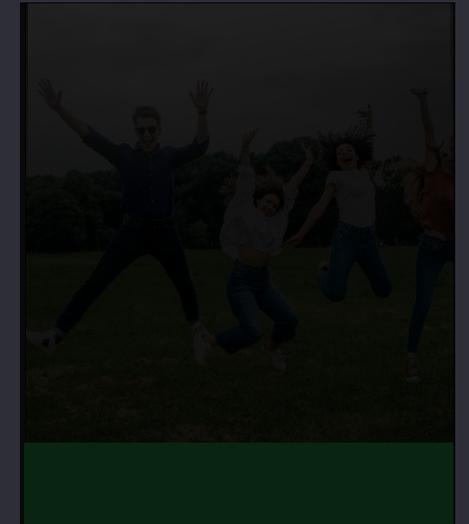
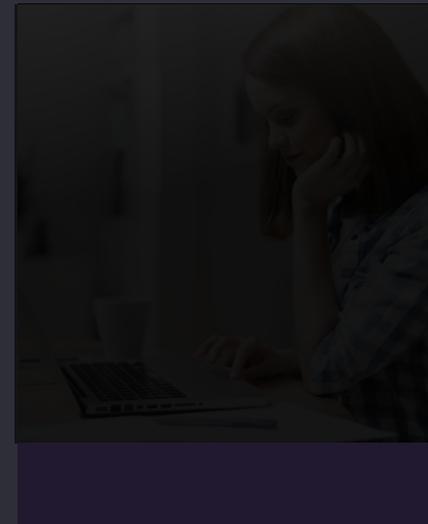
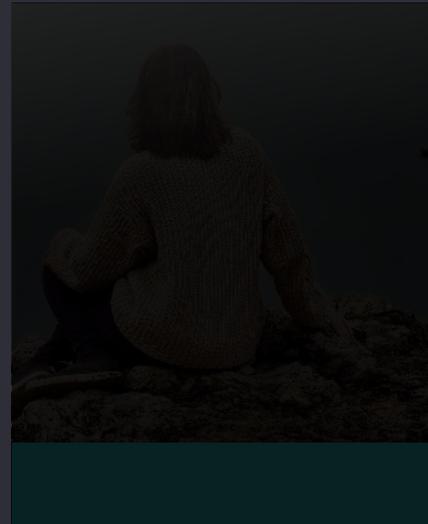
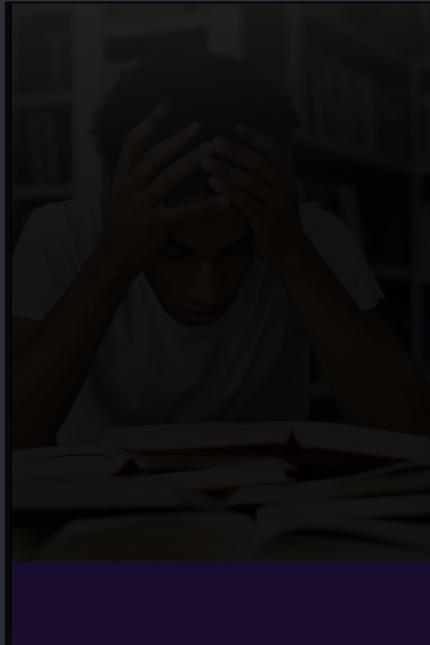
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Quick demos key:

- Statistics are significantly greater than expected.
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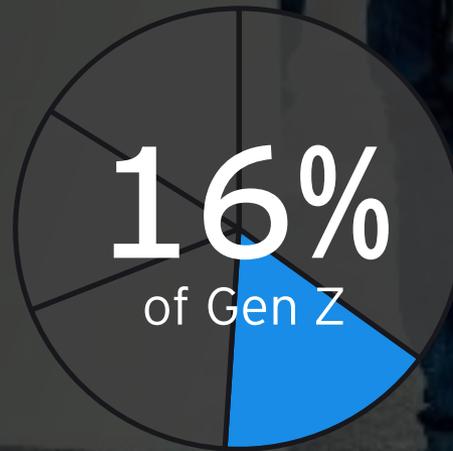
# Authentic Activists

This group takes up a smaller portion of the pie but makes a big splash.

Authentic Activists are as motivated as Stressed Strivers but have a different goal – saving the world. And they’re driven by the fear of what happens if they don’t.

Authentic Activists over-index female, perhaps driven by an era defined by feminism and gender parity. And even though this group is small, it’s the most outspoken, making full use of the social tools that are second nature. Their supportive parents encouraged them to follow their passion, and now Authentic Activists will disproportionately drive change in business, politics and society as a whole. Look out.

Key qualities
Determined
Passionate
Open-minded



Key segmentation variables	Compared with others
Job: want to make a difference in the world	Over-indexes
Job: want to make a lot of money	Under-indexes
Job: want to be the best	Under-indexes
Job: want to enjoy their work	Over-indexes
Importance of trying to change things that are wrong in the world	Over-indexes
Interested in environmental issues	Over-indexes
Importance of being authentic and true to yourself	Over-indexes

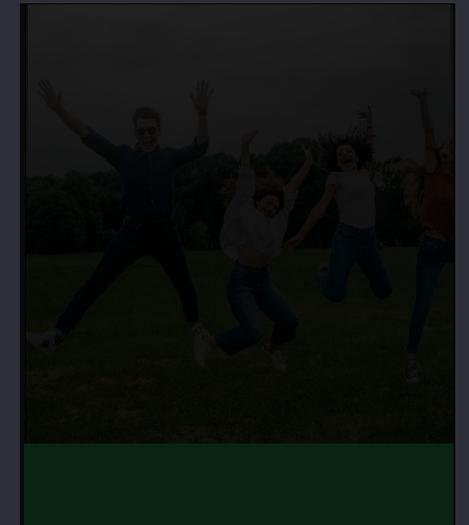
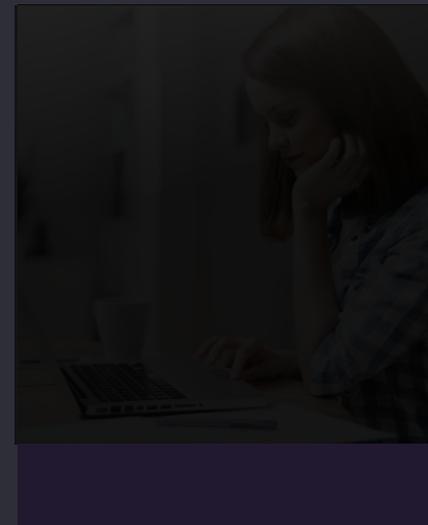
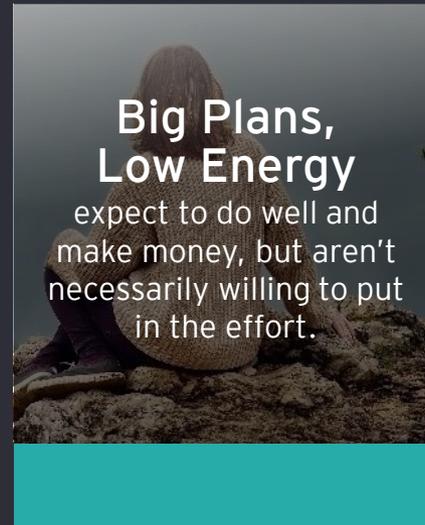
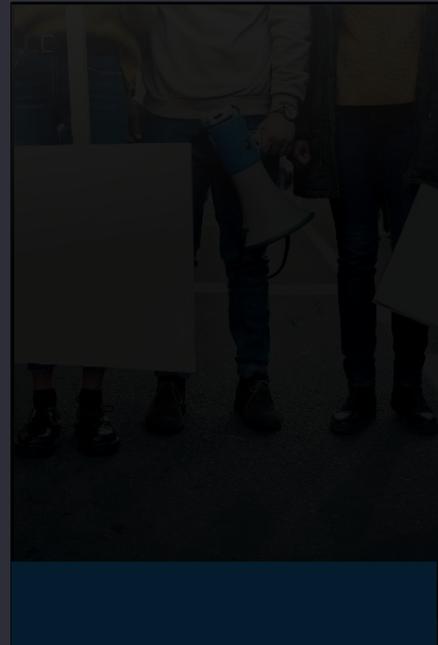
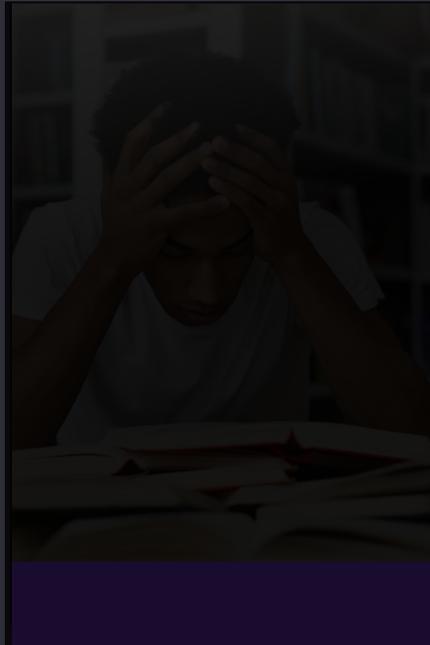
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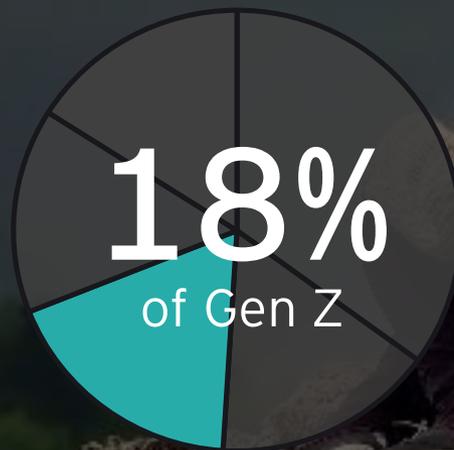
# Big Plans, Low Energy

This group expects to do well and make money, but unlike the Stressed Strivers, this group doesn't correlate effort to success.

This group most closely resembles the stereotype placed on millennials in decades past.

This group isn't defined by one type of parenting style, which perhaps shows that the group's lack of drive is internal rather than a reaction to external expectations. Without the drive to achieve goals, this group likely won't be influential in driving change in society, but the group may help reinforce "bad" perceptions of the generation as a whole.

Key qualities
Dreamers
Value lifestyle
Living in the moment



Key segmentation variables	Compared with others
Job: want to make a lot of money	Over-indexes
Job: want to be the best	Under-indexes
Job: want to enjoy their work	Over-indexes
Job: Want a job that others respect/admire	Under-indexes
Importance of becoming rich	Over-indexes
Prioritize spending time on things you enjoy now vs. on things that will help you in the future	Over-indexes

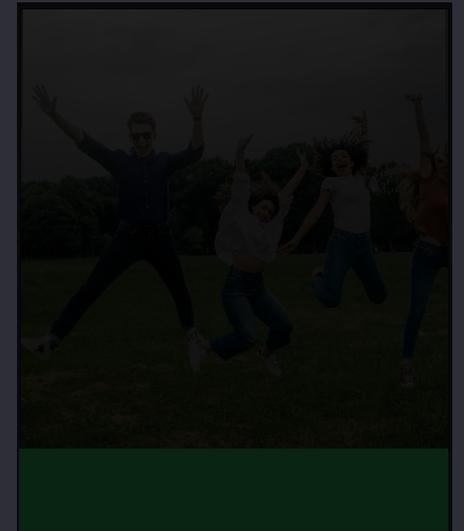
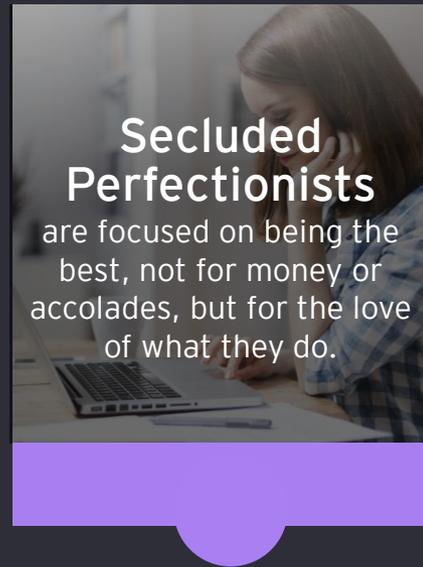
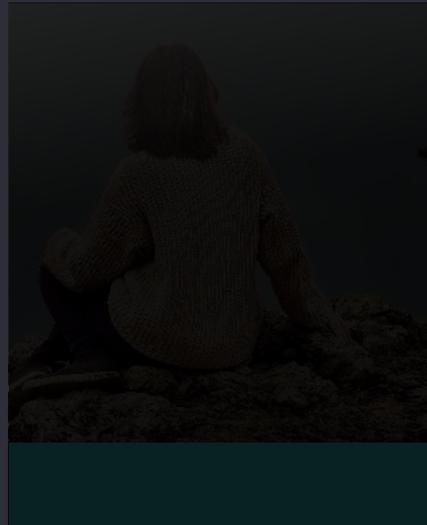
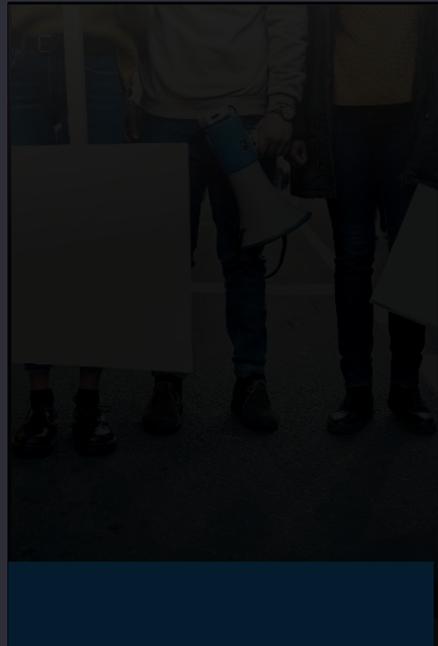
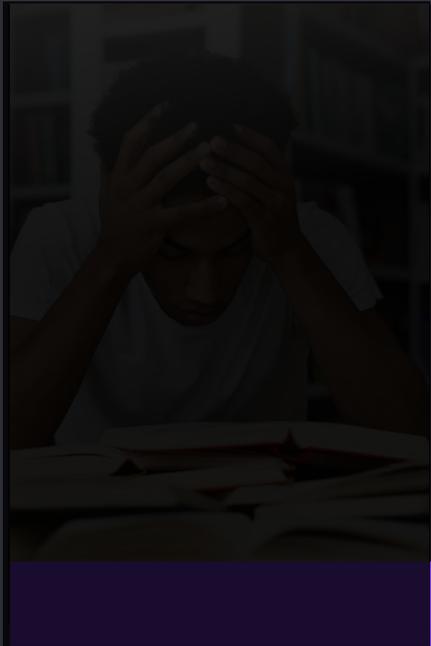
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# Secluded Perfectionists

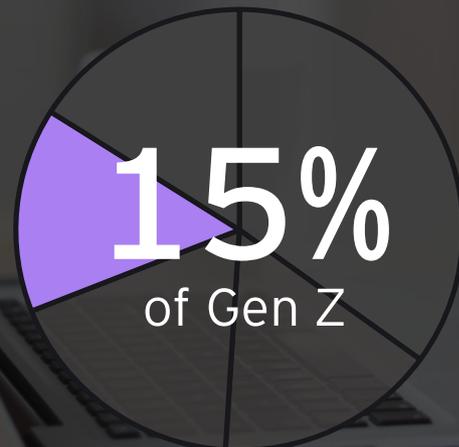
This group is focused on being the best, not for money or accolades, but for the love of and personal connection to what they do.

This group's supportive parents allowed Secluded Perfectionists to explore their passions, and now they're creating a career out of them – whether that's gaming, fashion, the arts or coding, among many other things.

This group has reshaped what following your dreams looks like. Secluded Perfectionists have taken their passions and created brand new career paths. A decade ago, who would've thought there would be multibillion-dollar industries around e-sports or social media influencers?

Help Secluded Perfectionists realize their dreams, and you'll have a secret weapon that can't be replicated.

Key qualities
Passionate
Driven
Intrinsically motivated



Key segmentation variables	Compared with others
Job: want to be the best	Over-indexes
Job: want to enjoy their work	Over-indexes
Job: want to make a lot of money	Under-indexes
Job: want a job that others respect/admire	Under-indexes
Importance of becoming rich or famous	Under-indexes

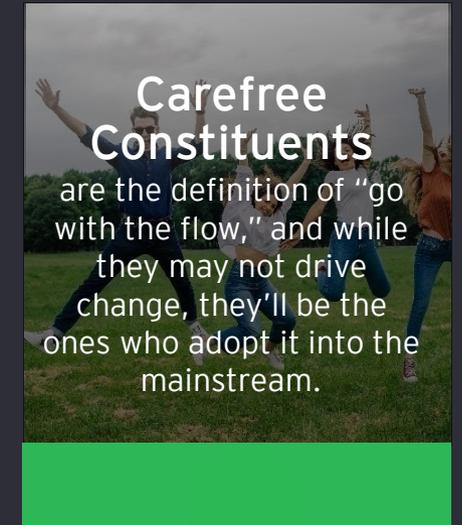
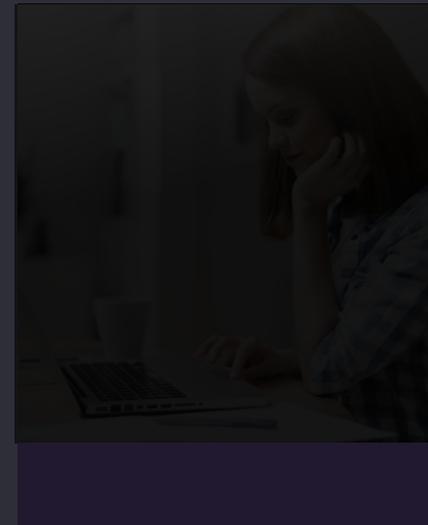
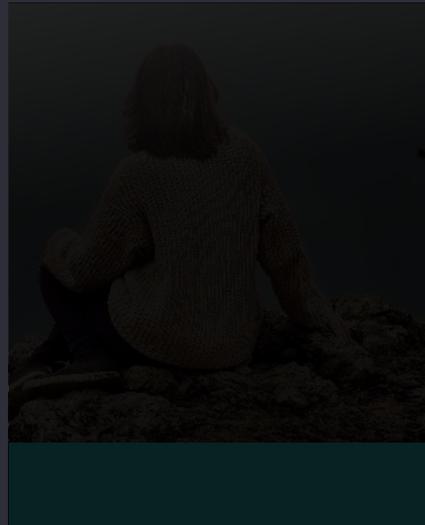
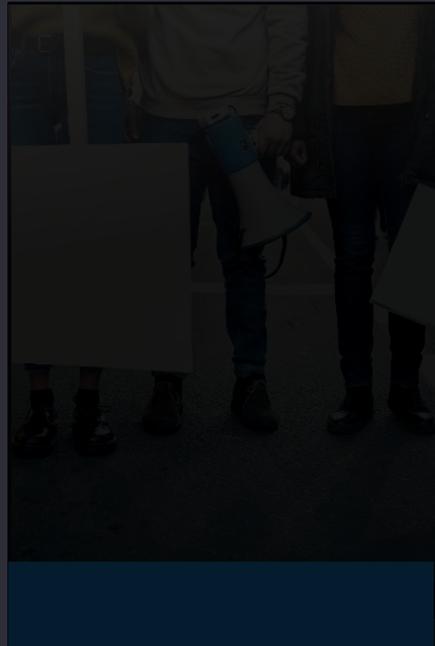
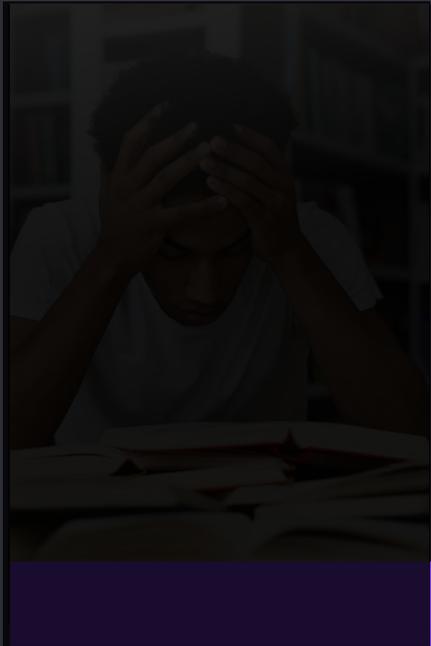
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**Carefree Constituents**  
are the definition of “go with the flow,” and while they may not drive change, they’ll be the ones who adopt it into the mainstream.

# Carefree Constituents

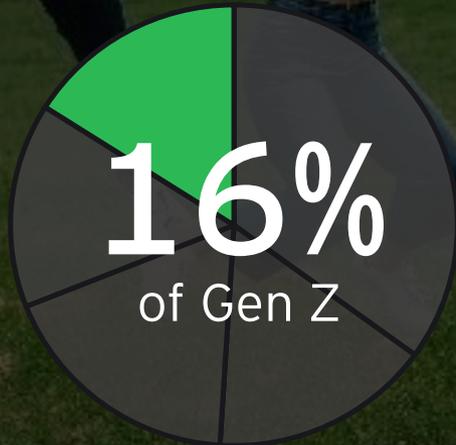
This group is the definition of “go with the flow.”

They’ll follow whatever trend calls their name, without being driven by pressure to succeed or concern of what others think.

Paradoxically, Carefree Constituents reported having “controlling” parents, saying they feel that their parents were overly critical. Could Carefree Constituents be rebelling against that pressure as they become adults?

Although Carefree Constituents may not drive change, this large group serves as the gatekeepers to the mainstream. What this group adopts will have a significant impact on society as a whole.

- Key qualities
- Living in the moment
- Easygoing
- Open-minded

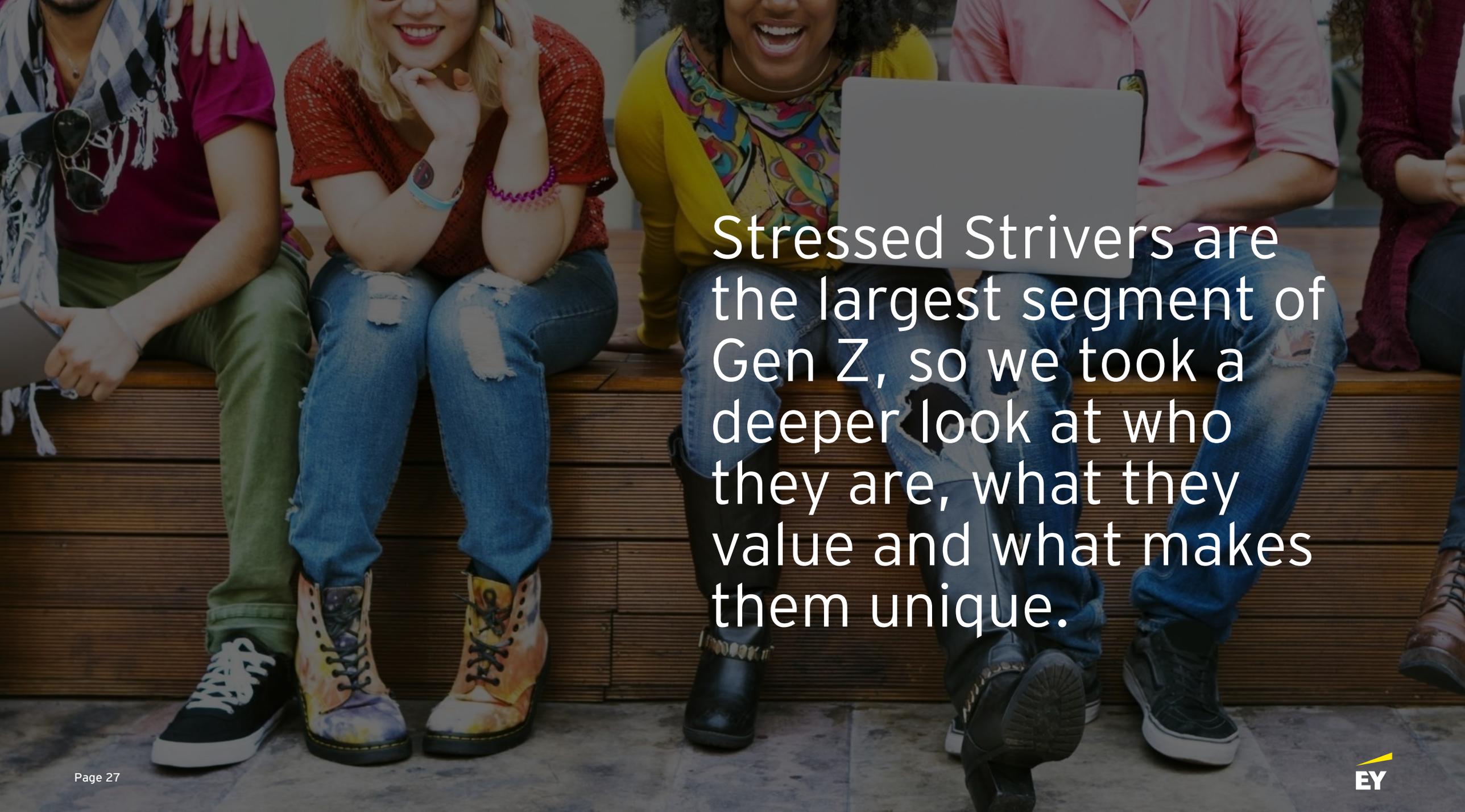


Key segmentation variables	Compared with others
Importance of spending time on things that will help you in the future	Under-indexes
Importance of being independent and figuring things out on your own	Under-indexes
Importance of spending time on things you enjoy right now	Under-indexes
Importance of earning what you get (instead of it being given to you)	Under-indexes
Prioritize spending time on things you enjoy now vs. on things that will help you in the future	Over-indexes
Worried about grades; stressed	Under-indexes

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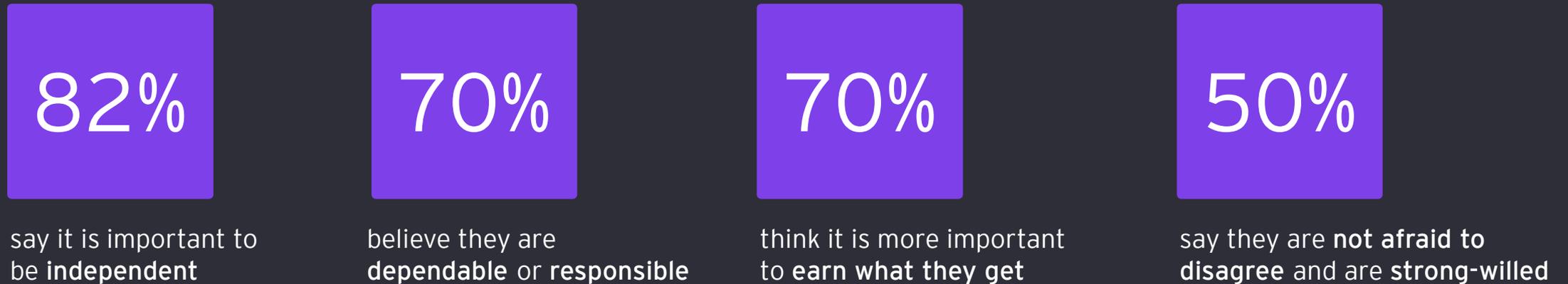
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Stressed Strivers are the largest segment of Gen Z, so we took a deeper look at who they are, what they value and what makes them unique.

# Independence is a top priority ...

Stressed Strivers are eager to define their own path and have the drive and confidence to position themselves for success. Their desire for independence does not necessarily come from a need for rebellion; in fact, many of the parents of this generation encourage their Gen Z children to be responsible for themselves from a young age. Stressed Strivers strongly prefer to earn what they get rather than have it given to them – they are excited about solving problems, finding success through their own initiatives and sticking up for themselves.



Q: How well does each of the following sets of words describe you? [Scale: Doesn't describe me at all; Describes me slightly well; Describes me moderately well; Describes me very well; Describes me extremely well] (average n=2,048)

Q: How important do you think it is to ... [Scale: Not at all important; Slightly important; Moderately important; Very important; Extremely important] (n=2,050)

# ... but they always want be connected

Stressed Strivers grew up with the world at their fingertips thanks to technology, allowing them to be connected at all times. They want to be part of a supportive community and have positive connections with others, whether digital or in-person. Stressed Strivers seek uplifting relationships and want to invest in people and initiatives that they identify with, thereby bettering their relationship with themselves and supporting those around them.

75%

describe themselves as supportive, generous or someone who likes to help others

The supportive nature of Stressed Strivers enables them to create more meaningful relationships and connect deeply to the people and things they care about.

55%

are more likely to say they are outgoing, talkative or like spending time with others

Stressed Strivers are often extroverts; their bubbly personalities enable them to connect with people and expand their networks.

46%

say they have volunteered in the past year

Stressed Strivers are eager to help others, connect to initiatives that matter to them and make the world a better place.

Q: How well does each of the following sets of words describe you? [Scale: Doesn't describe me at all; Describes me slightly well; Describes me moderately well; Describes me very well; Describes me extremely well] (average n=2,048)

Q: In the past year, have you volunteered your time for a cause or organization, or have you not done this? (n=2,039)

# They're constantly planning for the future ...

Stressed Strivers are highly future-focused and spend much of their time doing things that will set them on the right path moving forward. Much of their stress or anxiety comes from ensuring they'll be successful down the line, such as doing well in school, getting a good job that others admire and paying for college or university. More than half of Stressed Strivers have parents who classify as helicopter parents, possibly influencing much of the pressure they feel to plan for a fruitful future.

**90%** say it is important to spend time on things that will help them in the future

**58%** think it is extremely important to do well in school

**41%** are very worried about paying for university/college

**50%** of Stressed Strivers say they have helicopter parents

Stressed Strivers claim their parents worry about them too much, constantly tell them what they are doing wrong, have contacted a teacher or coach because of perceived unfairness, or try to control too much of their life.

Q: How important do you think it is to ... [Scale: Not at all important; Slightly important; Moderately important; Very important; Extremely important] (n=2,050)

Q: How important to you is it to do well in school? [Scale: Not important at all; Slightly important; Moderately important; Very important; Extremely important] (n=1,813)

Q: What worries or stresses you out the most? (open-ended; n=2,043; multiple responses were allowed)

Q: How well does each of the following statements describe your parent or guardian? [Scale: Not well at all; Slightly well; Moderately well; Very well; Extremely well] (average n=2,043)

# ... but also want to enjoy the moment

For Stressed Strivers, enjoying life to its fullest also means living in the moment. In addition to planning ahead, they aspire to commit to things that make them happy and take opportunities that are fulfilling in the present.

81%

**say it is important to spend time on things they can enjoy now**

Stressed Strivers want to spend almost as much time on things they can enjoy in the moment as they do on things that help them in the future.

68%

**would currently describe themselves as happy or content**

Stressed Strivers find happiness in the present regardless of the constant pressure from themselves and their surroundings.

Q: How important do you think it is to ... [Scale: Not at all important; Slightly important; Moderately important; Very important; Extremely important] (n=2,050)

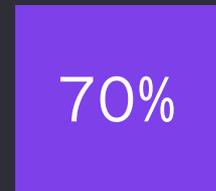
Q: How well does each of the following sets of words describe you? [Scale: Doesn't describe me at all; Describes me slightly well; Describes me moderately well; Describes me very well; Describes me extremely well] (average n=2,048)

Q: When you go somewhere new or do something exciting, do you usually share that experience on social media in the moment, share the experience on social media after it's all done, or do you usually not share that kind of experience on social media? (n=1,715)

Q: What worries or stresses you out the most? (open-ended; n=2,043; multiple responses were allowed)

# They're always striving to learn, do and achieve more ...

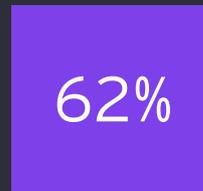
Stressed Strivers are continually looking for the next experience to "build their resumes" – how they can learn, do and achieve more to create a better version of themselves. Stressed Strivers are also part-time activists who aim to make a difference in the world. Thinking outside the box and being open-minded and curious, they are always looking for what's next and how they can take advantage of each opportunity to put themselves at the top.



say it is important to change things that are wrong in the world



describe themselves as imaginative or creative



say they are curious and open to trying new things

**48%** think it is important to be the best at their job

**44%** want to have a job that others admire

Q: How important do you think it is to ... [Scale: Not at all important; Slightly important; Moderately important; Very important; Extremely important] (n=2,050)

Q: How well does each of the following sets of words describe you? [Scale: Doesn't describe me at all; Describes me slightly well; Describes me moderately well; Describes me very well; Describes me extremely well] (average n=2,048)

Q: What is most important to you in a future job or career? Please rank each of the following statements with 1 being the most important to you in a future job or career, 2 being the next most important, and so on. (n=2,054)

# ... but they want to remain authentic

Though Stressed Strivers are constantly reworking their brand to be the best they can be, they also want to be true to themselves and their unique identity. They are most interested in associating with people, brands, products and businesses that are honest and transparent. Gaining the loyalty of this generation is difficult, but connecting authentically is an essential step in establishing a foundation of trust.

92%

think it is extremely important to be **authentic**

The majority of Stressed Strivers put authenticity at their core and want it to be a driver for everything they do.

46%

are worried about others being treated badly because of their **identity**

Stressed Strivers feel accountable for others and their acceptance as well.

Q: How important do you think it is to ... [Scale: Not at all important; Slightly important; Moderately important; Very important; Extremely important] (n=2,050)

Q: How stressed or worried do you feel about each of the following? [Scale: Not at all worried; Somewhat worried; Moderately worried; Very worried; Extremely worried] (average n=2,033)

Q: What is most important to you in a future job or career? Please rank *each* of the following statements with 1 being the most important to you in a future job or career, 2 being the next most important, and so on. (n=2,054)

# Takeaway

Society wants to create a simple definition of Gen Z, but **we can't put them in a box.**

The people of Gen Z are not all the same – they're different from each other. From other generations. From our expectations.

In reality, Gen Z reflects the changes and contradictions that pervade our society today. This group of young people has a vast range of motivators, personalities and dreams, and each segment of Gen Z requires a different approach.

To meet Gen Z's needs, winning companies will take the time to understand its various segments, learn to be agile and harness the power of individualization.

Gen Z continues to defy expectations. To keep up, winning companies will do that same.

**Interested in learning more about Gen Z and how to connect with this group as consumers and employees?**

Contact EY Americas Cultural Insights & Customer Strategy Leader, [Marcie Merriman](#).

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