



Gen Z – a generation of contradiction

Generation Z Segmentation Study
Top-line findings and the power of five

April 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.

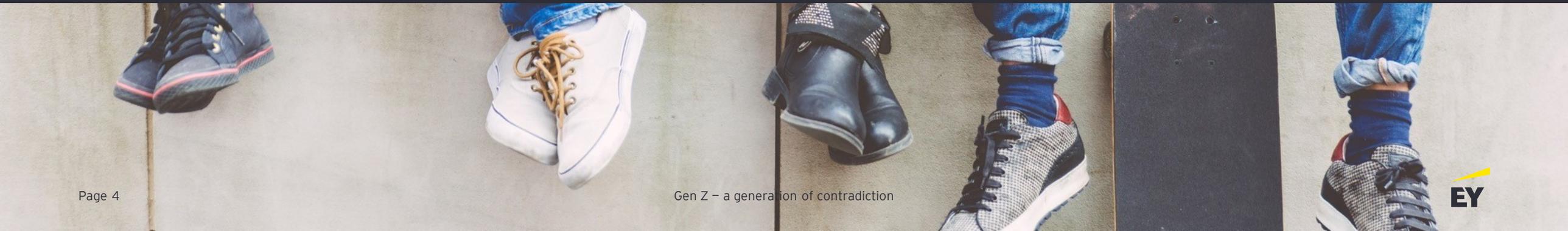
At the same time, emerging technologies, such as the smartphone and 4G connectivity, gave Gen Z immediate access to a world of information, as well as a front-row seat to the turbulence and uneasiness that's become our new norm. The ultra-protective helicopter parents of the millennial generation were 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.

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 that the sample resembled the US population. Parental consent was obtained prior to interviewing young adults aged 12 to 17.



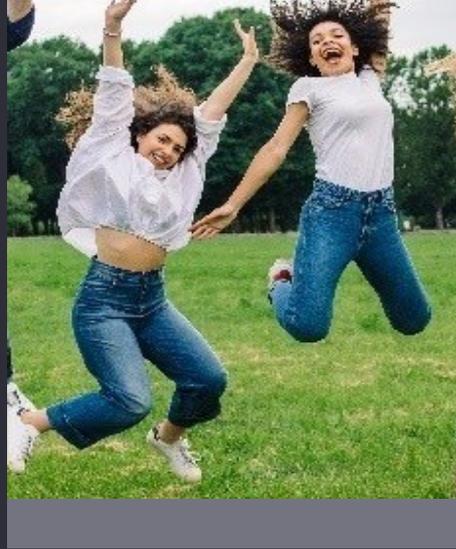
Gen Z is different. Different from millennials.
Different from each other.
Different from your preconceived notions.
They're a generation of contradiction.



What are Gen Z contradictions?



Known as an
“overshare”
generation,
but instead ...



Known as an
“idealistic”
generation,
but instead ...



Known as a
“liberal”
generation,
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Known as an
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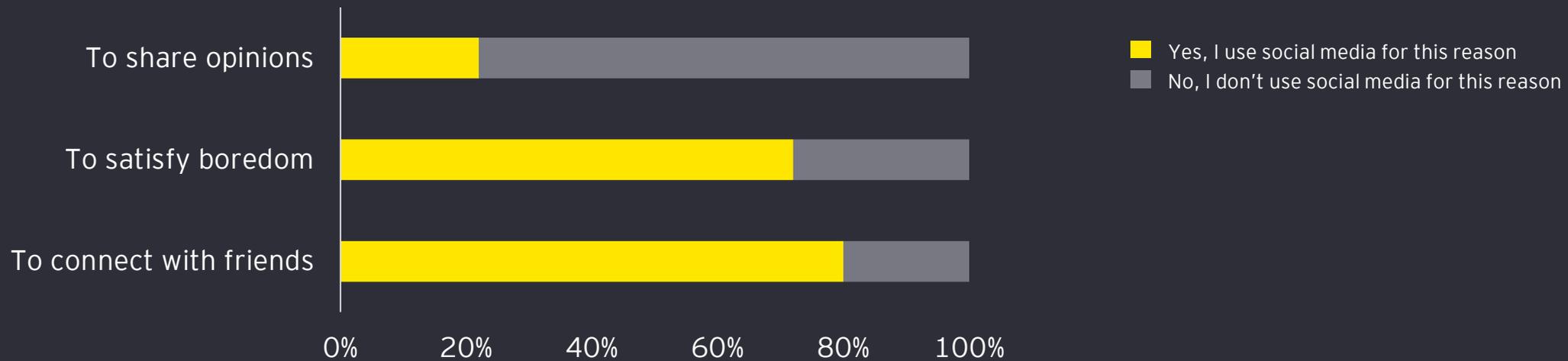


Known as an
“unrestrained”
generation,
but instead ...

... 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)

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



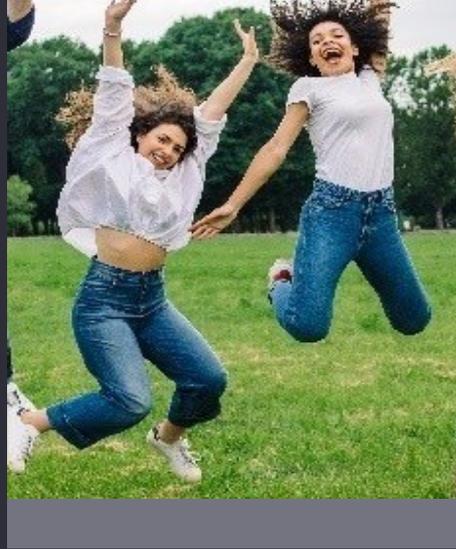
That contradicts society's perceptions of Gen Z's goals and priorities. Gen Z prioritizes "doing" and preparing for the future over dreaming about it.

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)

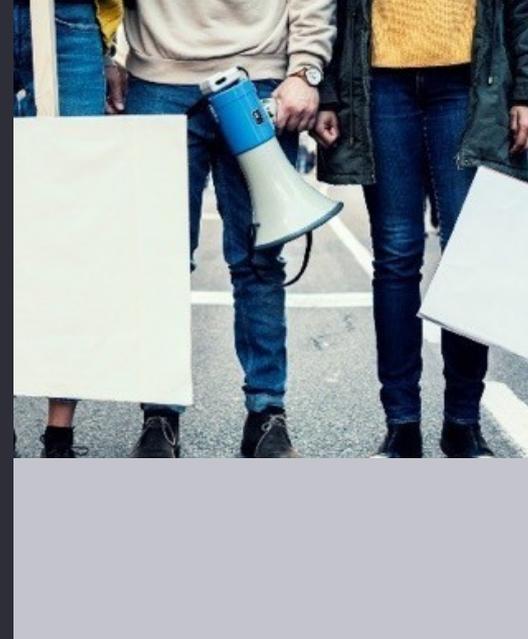
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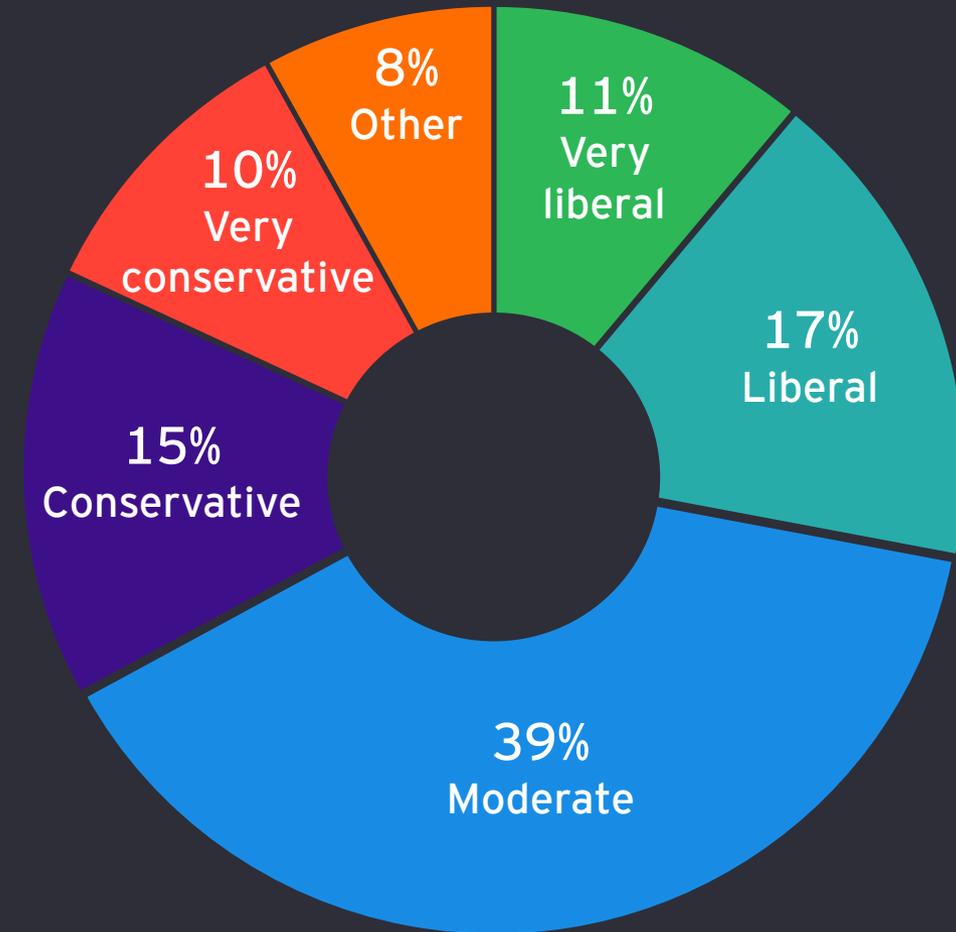
... they actually span the range of the political spectrum, reflecting broader America in their views

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.

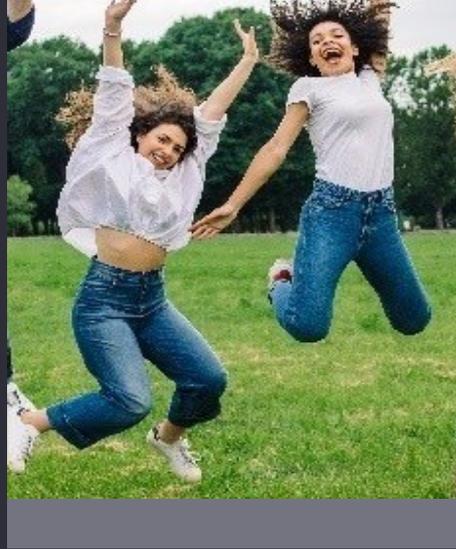
Q: How would you describe your political views – very conservative, conservative, moderate, liberal or very liberal? (n=2,026)



What are Gen Z contradictions?



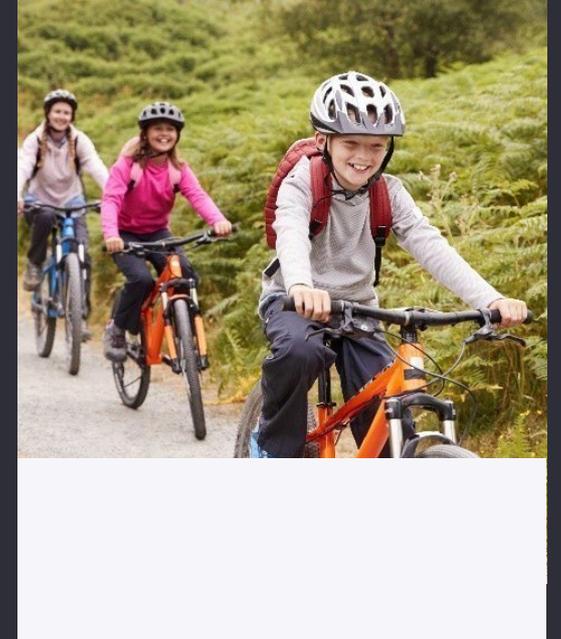
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... their strong values make it hard to gain their trust

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.

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35%



16%



18%



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Today's primary drivers of societal perception of Gen Z

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Less prominent today, but equally important segments in a diverse Gen Z landscape

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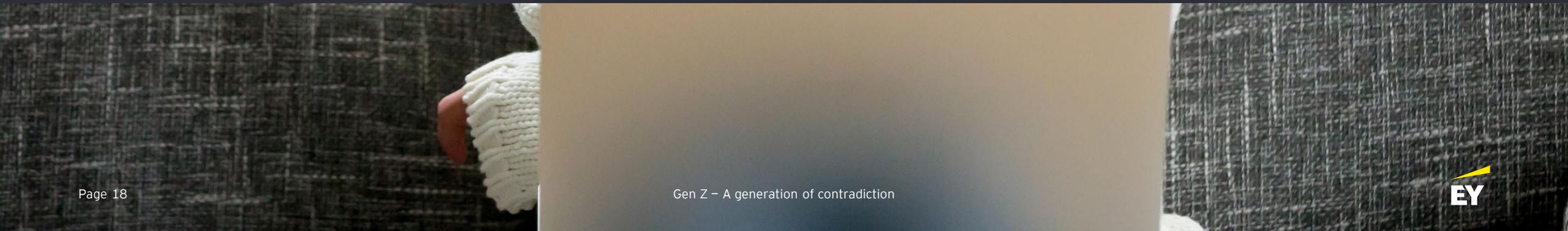
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The largest cohort, **Stressed Strivers**, are independent, ambitious and ready to blaze a path to the top. The question is whether they will burn out on the way.



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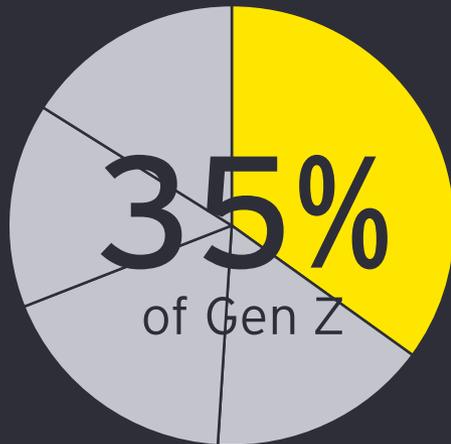
35%
of Gen Z

Stressed Strivers

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

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.



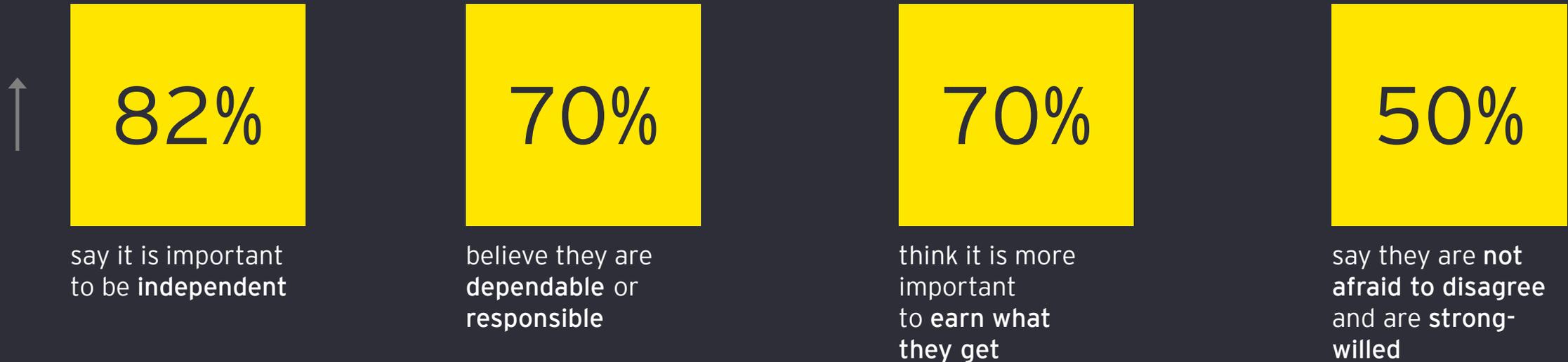
Compared with others:

- ↓ Want to enjoy their work
- ↑ Want a job that others respect
- ↑ Stressed
- ↑ Want to be the best
- ↑ Prioritize independence
- ↑ Prioritize earning what they get

Key characteristics
Independent
Anxious
Future-focused

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)

↑ Said this more than any other segment

↓ Said this less than any other segment

... but they always want to 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 or 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.

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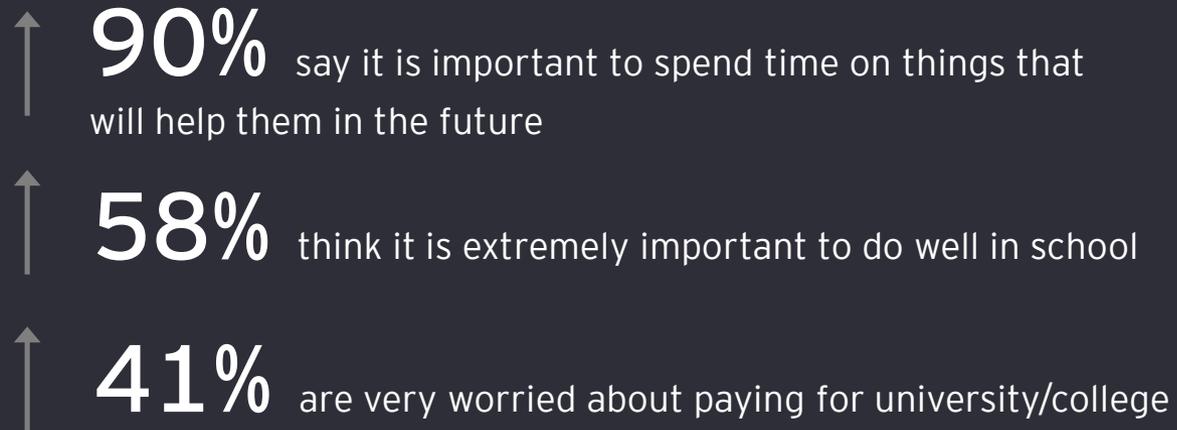
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They're constantly planning for the future ...

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.



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)

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↓ Said this less than any other segment

... 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)

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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.

70%

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

66%

describe themselves as **imaginative or creative**

62%

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**

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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.

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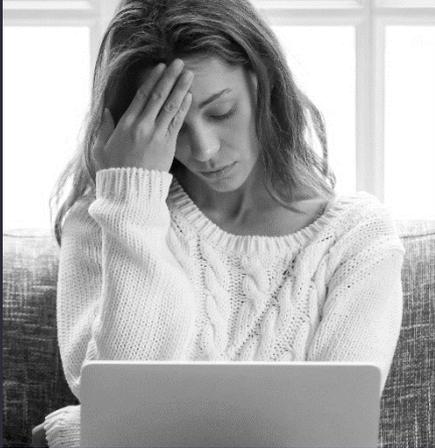


Authentic Activists are one of the smallest segments of Gen Z, but heavily influence its public perception due their highly vocalized views that span multiple issues and political ideologies.



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Authentic Activists

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

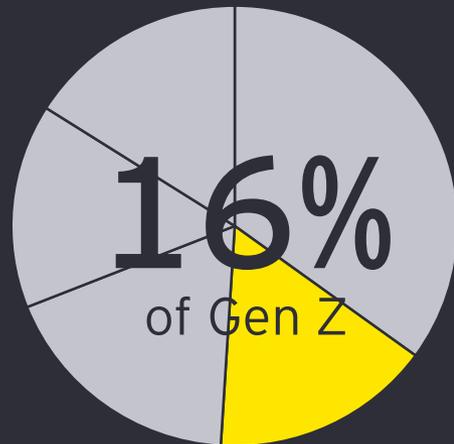
16%
of Gen Z

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.



Compared with others:

- ↓ Want to make a lot of money
- ↓ Want to be the best
- ↑ Want to make a difference in the world
- ↑ Want to enjoy their work
- ↑ Interested in environmental issues
- ↑ Importance of trying to change things that are wrong in the world

Key characteristics
Determined
Passionate
Open-minded

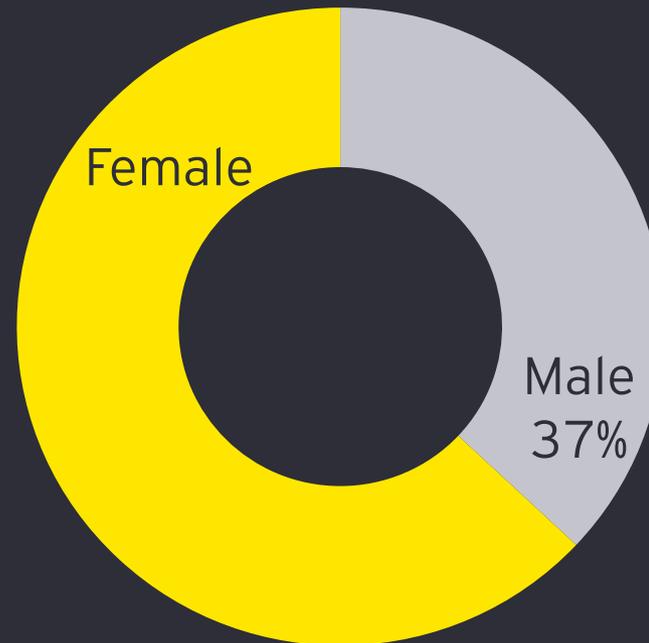
The majority identify as female ...

The majority of the Authentic Activist segment identifies as female. In the era of #MeToo, social issues directly related to women have come to be top of mind in our society. New challenges to *Roe v. Wade*, increasingly restricted access to contraceptives, and a lingering disparity in real wages between men and women have catalyzed an emphasis on gender issues. These proved top of mind for Authentic Activists, along with other key issues.

63%

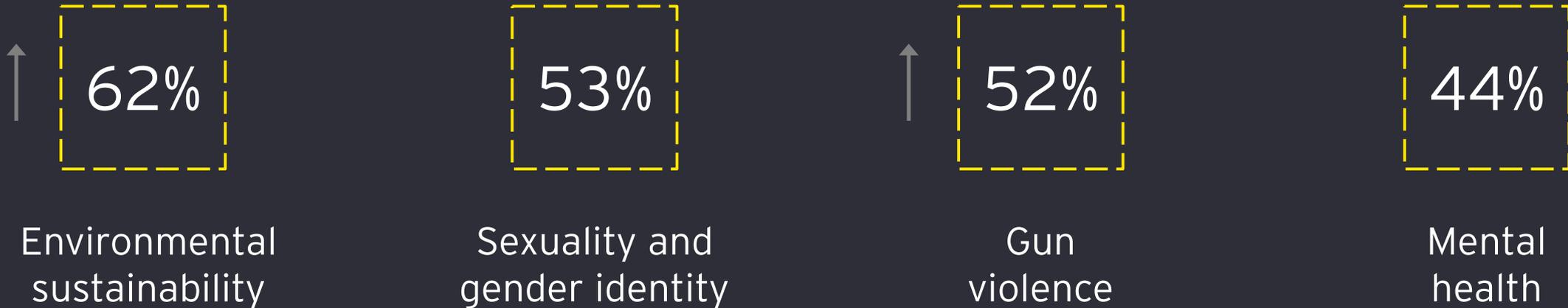
of Authentic Activists
identify as female

Gender breakdown



... and they are passionate about a variety of issues

The cause that often comes to mind when thinking of Authentic Activists is environmental sustainability. In reality, Authentic Activists may feel passionate about a variety of causes – from environmental issues to mental health, gun safety and personal identity. The degree to which Authentic Activists feel concerned about a particular issue also varies, and they are not necessarily focused on one cause in particular.

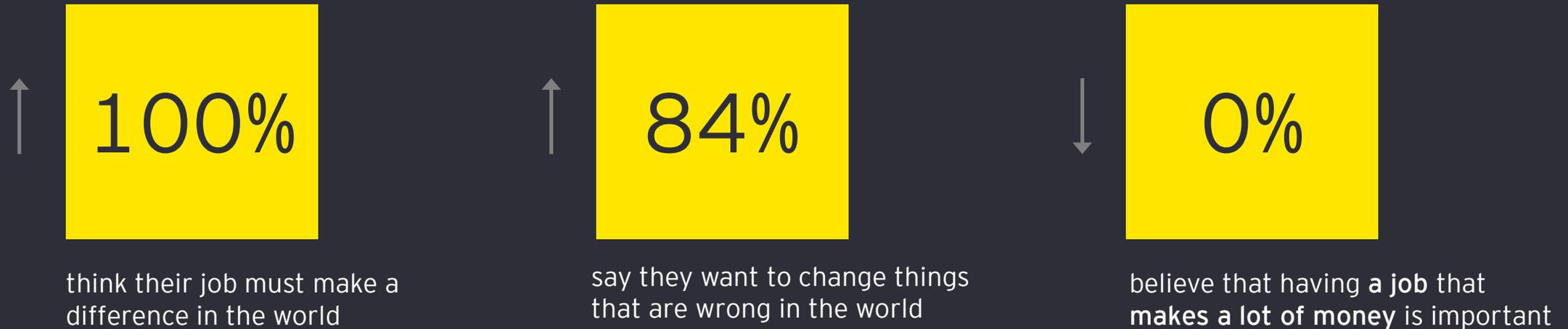


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They are highly motivated to fix the world

Authentic Activists are eager to save the world – and fear what will happen if they do not. They are highly motivated, but not by conventional motivations such as money, fame or influence. Rather, their motivation is derived from their desire to effect positive change in the world in which they live, instead of simply relying on others to do so. They believe that the only way to achieve what they desire is to play an active role in shaping their world.

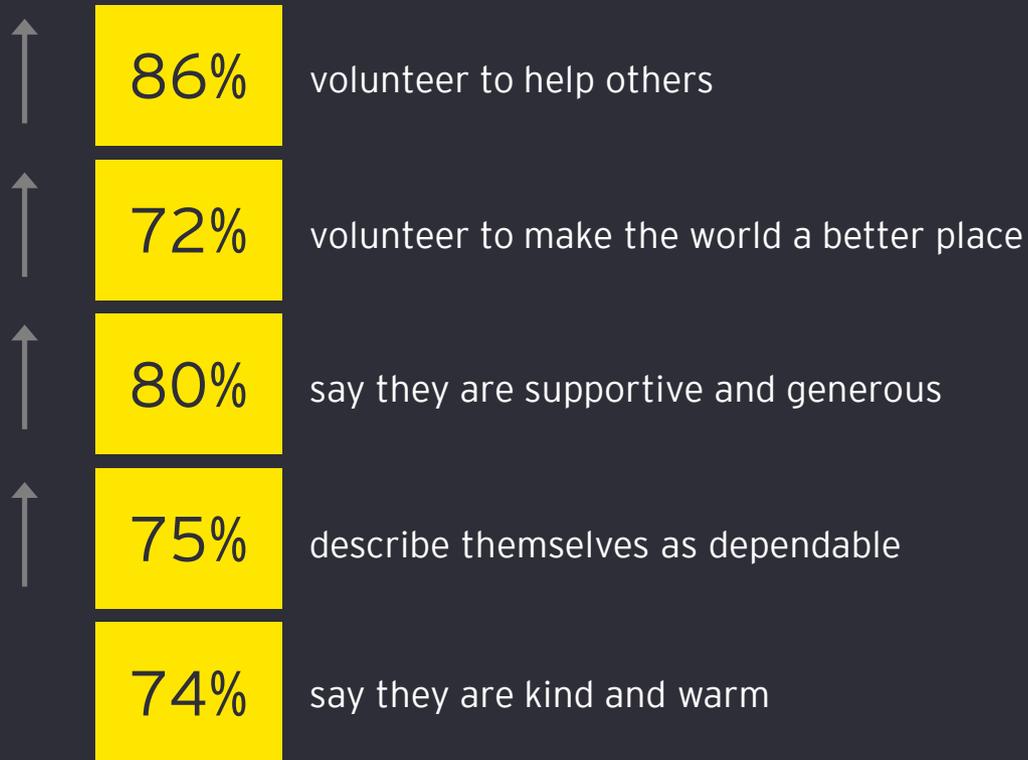


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They have a desire to help others ...



Authentic Activists are the most likely among Gen Z to want to help others. While not entirely altruistic, they desire to have a positive impact on the people in their lives and the world in which they share. Due to this, Authentic Activists are more likely than their peers to describe themselves as supportive and dependable, and they volunteer more than any of the other segments. Their ambitions are often far-reaching or even global, matching their awareness and visibility.

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

Q: (If have volunteered): Why do you volunteer? Select all that apply. (n=824; multiple responses to this question were allowed, so percentages will not sum 100)

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)

Q: Would you say that most of the time people try to be helpful, or that they are mostly just looking out for themselves? (n=2,033)

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... and are politically engaged across the spectrum

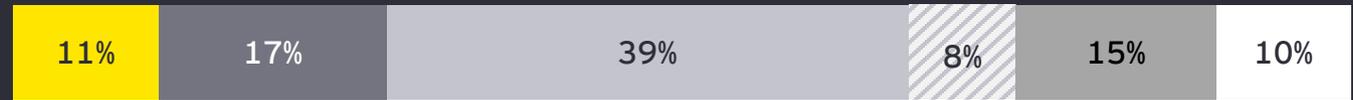
While they slightly lean leftward of their peers on the political spectrum, there are Authentic Activists in every political bucket – from very liberal to very conservative. What unites them is their passion and their intention to make change.

↑ **84%** of Authentic Activists plan to vote in the presidential election

↑ **92%** plan to vote in their first presidential election after turning 18

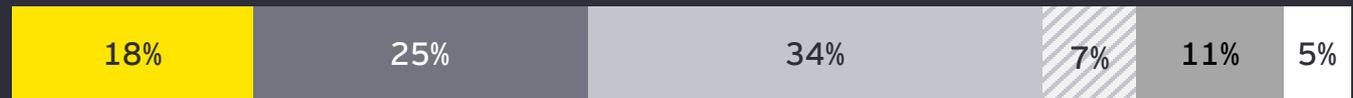
Generation Z

■ Very liberal ■ Liberal ■ Moderate ■ Other ■ Conservative ■ Very conservative



Authentic Activists

■ Very liberal ■ Liberal ■ Moderate ■ Other ■ Conservative ■ Very conservative



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

Q: Have you ever participated in a political rally or protest, or signed a petition for a cause you agree with, or have you not done this? (n=2,044)

Q: Do you plan to vote in the [IF AGE >= 17: "2020 presidential election"] [IF AGE < 17: "first presidential election after you turn 18"], or do you not plan to vote in that election? (n=1,121 & n=920)

↑ Said this more than any other segment

↓ Said this less than any other segment



Those in the **Big Plans, Low Energy** segment are fixated on future financial success, while shrugging off the steps to get there. Although this segment is smaller in size, their high social media engagement may amplify their voice beyond the reality they represent.



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Big Plans, Low Energy

expect to do well and make money, but aren't necessarily willing to put in the effort.

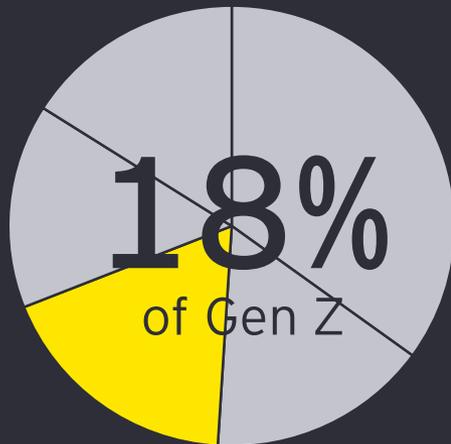
18%
of Gen Z

Big Plans, Low Energy

This group expects to do well and making a lot of money is a top priority, but unlike the Stressed Strivers, this group doesn't correlate effort to success.

This group most closely resembles stereotypes placed on millennials in decades past. But as was likely the case with millennials, this segment represents the attitudes and values of only a portion of Gen Z.

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, as was the case with millennials.



Compared with others:

- ↓ Want a job that others admire
- ↓ Want to be the best
- ↑ Want to make a lot of money
- ↑ Want to enjoy their work
- ↑ Prioritize becoming rich
- ↑ Prioritize spending time on things they enjoy vs. will help in future

Key characteristics
Dreamers
Value lifestyle
Living in the moment

They want to live in the moment, yet worry about money

Big Plans, Low Energy are more worried than any other segment about not having enough money. As such, fun and spontaneity are more difficult than for their peers. Amid these anxieties, few see themselves as fun or outgoing. Compared with their peers, they are more focused on obtaining a financial identity associated with wealth and do not care as much how it comes to fruition. When contemplating their future, they are predisposed to prioritizing financial considerations above all else.



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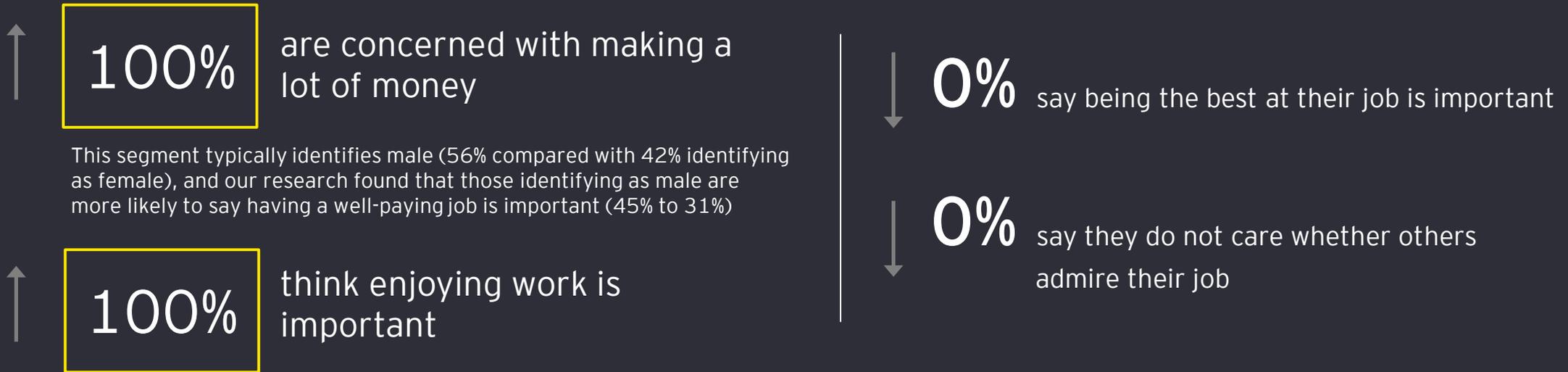
Q: What words or phrases would you use to describe yourself? Please finish each of the "I am" statements below. (open-ended; n=2,046; multiple responses were allowed)

↑ Said this more than any other segment

↓ Said this less than any other segment

They have unrealistic expectations about their career

Big Plans, Low Energy are average students who might straddle higher levels of academic achievement, but they lack the motivation needed to excel beyond. After schooling, they are naïve idealists about their future careers: they want well-paying, enjoyable jobs without exerting effort to obtain them. Work is an important aspect of their futures, but they are not concerned with success, other than money or admiration.



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)

↑ Said this more than any other segment
↓ Said this less than any other segment

They are largely disengaged with the world's problems ...

Beyond their own interests, Big Plans, Low Energy have few concerns. They care little about making social impact through their work, and they are not worried about societal problems in general. Self-gain trumps concerns about others and the world at large as they are too preoccupied with their own sphere to worry about existential threats to society. Compared with their contemporaries, they are less likely to volunteer. When they do donate their time, it is through often required work or school community programs instead of on their own accord.

↓ **0%** care whether their job makes a difference in the world
They do not associate work with any mission beyond earning money, and do not believe they have a duty to dedicate themselves to other causes.

14%

are interested in political issues
Less civically minded than their peers, they think about political issues only as far as public policies affect their own financial interests.

15%

are worried about the environment
Compared with contemporaries, they are much less concerned about critical climate and sustainability issues.

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)

Q: In general, how interested are you in political issues? [Scale: not at all; slightly interested; moderately interested; very interested; extremely interested] (n=2,024)

Q: In general, how interested are you in environmental issues? [Scale: not at all; slightly interested; moderately interested; very interested; extremely interested] (n=2,032)

↑ Said this more than any other segment

↓ Said this less than any other segment

... but are highly engaged on social media

Big Plans, Low Energy tend to see the world as it is, rather than what it could or should be. They use social media to communicate with and document their lives for their friends and family while others of Gen Z use social media to craft ideal portrayals of their lives.

88%

are likely to have a social media account

They are among the most likely to have at least one social media account.

They are more likely than any other Gen Z segment to use social media to share in the moment. While they portray their lives accurately, they feel the need to share fun or remarkable moments more often in response to their existential anxieties about money and quality of life.

91%

say it is important to be authentic

Big Plans, Low Energy do not fabricate or paint fake depictions of their lives on social media.

Q: Do you have any social media accounts, or do you not have any social media accounts? (n=2,038)

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: 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)

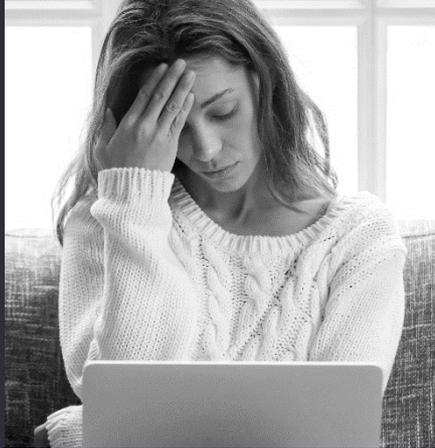


Secluded Perfectionists, the smallest segment of Gen Z, are intrinsically motivated about the things they are passionate about, regardless of the financial potential or external praise.



Five types of Gen Z

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



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

15%
of Gen Z

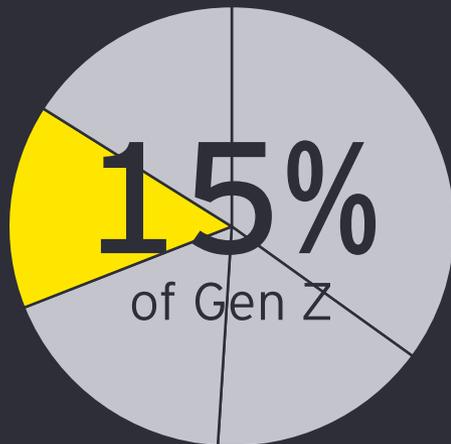
Secluded Perfectionists

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.



Compared with others:

- ↓ Want to make a lot of money
- ↓ Want a job others admire
- ↓ Want to become rich or famous
- ↑ Want to be the best
- ↑ Want to enjoy their work

Key characteristics
Passionate
Driven
Intrinsically motivated

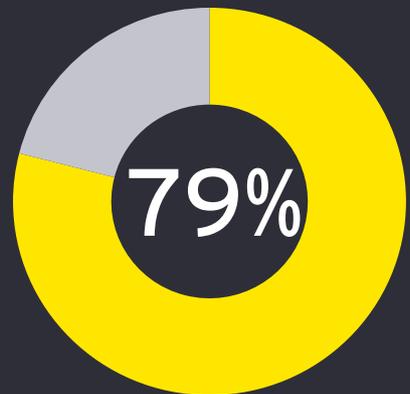
Excellence is a top priority ...

The opportunities of a digitally connected world equip the Secluded Perfectionists with innovative tools to harness their passions into new and unique careers. Because so much of the world is now open to them, Secluded Perfectionists turn what previous generations often consider personal passions and dreams into professional careers. Their passion for their trade is tied directly to their self-identity, and becoming the best at their craft is an expression of their self-worth. As this segment advances in their careers and perfects their trade, they won't be handing out participation trophies to those just showing up.



of Secluded Perfectionists say it is important to be the best at their job

Instead of desiring money, acclaim or admiration, Secluded Perfectionists find value in pursuing their dreams, mastering their craft and knowing they are unmatched in their field.



believe it is important to earn what they get

As Secluded Perfectionists focus on becoming the best, they understand the value of their hard work and do not expect handouts, making them opposed to unearned rewards and nepotism in their careers.

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)

↑ Said this more than any other segment

↓ Said this less than any other segment

... but they don't care about the associated monetary rewards or public renown

While public admiration may come with being the best athlete or influencer, it is important not to conflate that as the motivating factor for this segment. Secluded Perfectionists focus instead on how they feel when they excel, not how others, including their peers, perceive them. Extrinsic motivators like money and fame do not encourage or discourage the Secluded Perfectionists from working hard or choosing a specific path. Their passion and love for their work and chosen field exclusively guide their actions.

0%

think having a job others **admire** is important



Believe that having a job that makes a lot of money is important

Secluded Perfectionists don't consider the monetary potential of their work when building their careers and planning for the future, but instead are intrinsically motivated by their passion and love for their chosen craft.



Least likely to worry about money Secluded Perfectionists are the segment least likely to cite being worried about money, focusing instead on their internal motivation and rewards when striving for excellence in their work.

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: 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)

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

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)

↑ Said this more than any other segment

↓ Said this less than any other segment

They are proud of themselves and have high self-esteem ...

While many of their peers from other segments have a self-identity that is flavored by the outside world, Secluded Perfectionists view themselves through their own lens almost exclusively. Because Secluded Perfectionists care little about this outside perception, their self-view is more tied to their passion and ability. As their ability and aptitude grow, so does their self-esteem. This creates a positive loop of improved performance, drive for greatness, and increased self-worth that is entirely intrinsically motivated.

93%
think it is
extremely
important to
be authentic

↑ Secluded Perfectionists identify with being **fun and outgoing**, and/or **athletic and active**, making them the highest segment to perceive themselves with these attributes.

72% of Secluded Perfectionists see themselves as:

- ▶ Kind and warm
- ▶ Dependable and responsible

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)

↑ Said this more than any other segment
↓ Said this less than any other segment

... but external validation and making a large-scale impact is unnecessary to them

↑ **0%** believe it's important for their job to make a difference in the world

Only **20%** have participated in a political rally, protest or petition, making them one of the **least civically engaged** segments.

Only **29%** show an interest in **environmental issues**, which is less than half that of their Authentic Activist peers.

Secluded Perfectionists are able to home in on their work and targeted accomplishments. Because of this singular focus on what they love and find joy in, they are unconcerned with issues that fall outside of their chosen field. Despite being in the bottom segment group of political and environmental engagement, they are not completely indifferent to the world around them. Should their passion overlap with an external issue, they may become engaged as a part of their relentless focus on excelling.

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)

Q: Have you ever participated in a political rally or protest, or signed a petition for a cause you agree with, or have you not done this? (n=2,044)

Q: In general, how interested are you in political issues? [Scale: not at all; slightly interested; moderately interested; very interested; extremely interested] (n=2,024)

Q: In general, how interested are you in environmental issues? [Scale: not at all; slightly interested; moderately interested; very interested; extremely interested] (n=2,032)

↑ Said this more than any other segment

↓ Said this less than any other segment

They focus on turning current passions into future success ...

Because Secluded Perfectionists' professional and personal passions are one in the same, it is sometimes hard to differentiate work from life, making the things they enjoy in the present very similar to the activities they are working on to become successful. Any master pianist will practice a piece of music before playing at Carnegie Hall, but a Secluded Perfectionist needs to enjoy the entire process before and during the final performance.

100%

say it is important to enjoy their work

Secluded Perfectionists work hard because they love what they do and are intrinsically motivated by the joy of their hard work and success. This merger between professional and personal passion changes the way Secluded Perfectionists think about work/life balance because they do not see it as a choice between the two, but a fusion of both.

However, if Secluded Perfectionists are assigned tasks outside of their passions, they may rebel or ignore the work entirely in favor of continuing to follow their own personal goals.

84%

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

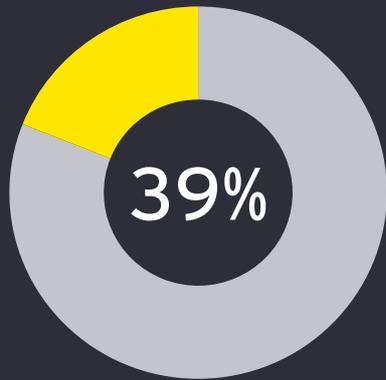
Secluded Perfectionists think it's important to earn what they have and enjoy it while they have it. However, spending time enjoying the present doesn't mean slacking off or sitting around with friends. For the Secluded Perfectionist, it is important to enjoy the ride to their success while keeping their eye on the prize.

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)

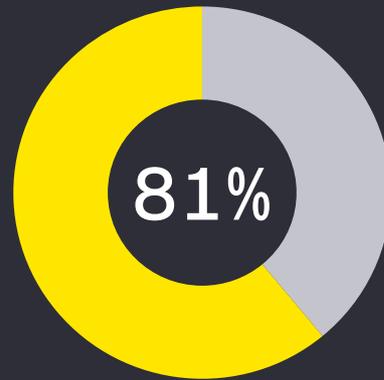
Q: What is most important to you in a future job or career? Please rank each of the following statements with 1 being the most important to you in a future job or career, 2 being the next most important, and so on. (n=2,054)

... but their journey is less conventional

Like Stressed Strivers, Secluded Perfectionists are working hard today with the future in mind and want to earn what they get. But unlike Stressed Strivers, Secluded Perfectionists are blazing their own path rather than subscribing to societal norms, benefiting from strong parental encouragement.



say it is very important to do well in school



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

79%

of Secluded Perfectionists say their parents are there to help them when they struggle

Secluded Perfectionists are the segment most likely say that their parents want them to be happy. This translates to supportive parents who acknowledge that Secluded Perfectionists have found their passion and consistently work to assist them in achieving that dream. This enables Secluded Perfectionists to try new and sometimes seemingly crazy things when designing their future because they are operating with the safety net of their encouraging and supportive parents.

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: 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)

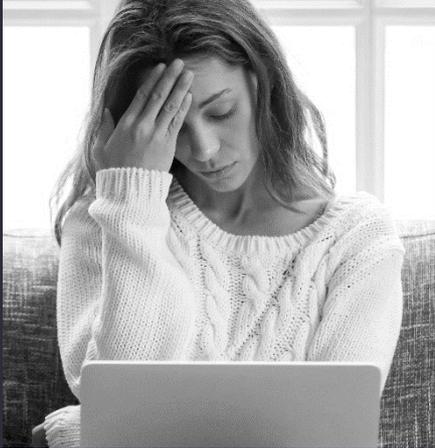


Carefree Constituents may not drive change, but they are open to being led. What they lack in influence, they will make up for in mass.



Five types of Gen Z

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



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.

16%
of Gen Z

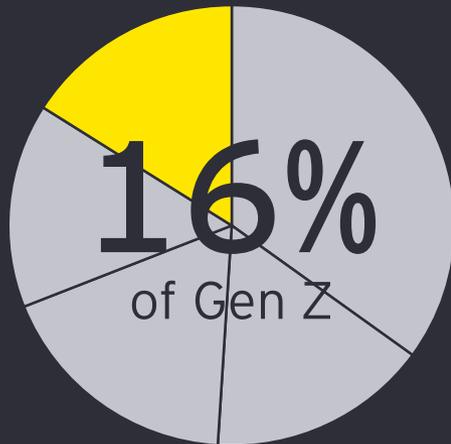
Carefree Constituents

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. They are amiable and not interested in creating waves or challenging the status quo.

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.



Compared with others:

- ↓ Prioritize spending time on things that will help in future
- ↓ Value independence
- ↓ Want to earn what they get
- ↓ Stressed; worried about grades
- ↑ Prioritize spending time on things they enjoy now (vs. will help in future)

Key characteristics
Living in the moment
Easy-going
Open minded

They can be indifferent and lack enthusiasm

While the Carefree Constituents understand the necessity of money, they are not willing to put in the requisite effort to earn it at high levels. They are not concerned with how their work fits into society as a whole. In fact, they are not concerned with their roles in society much at all. If a problem does not directly affect them, they won't be inclined to take initiative to fix it. They are apathetic in general and lack the foresight to conjure a picture of their future identity. Entitlement is also prevalent, as they do not draw a clear connection between effort and reward. As such, work is not a focus in their lives.

↓ **18%** are worried about getting a good or better job

↓ **13%** say it is important to spend time on things that will help them in the future

↓ **6%** say they are hardworking and determined

↓ **26%** say it is important to earn what they get

↓ **26%** think it is important to be independent

↓ **26%** say they are dependable and responsible

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: What words or phrases would you use to describe yourself? Please finish each of the "I am" statements below. (open-ended; n=2,046; multiple responses were allowed)

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)

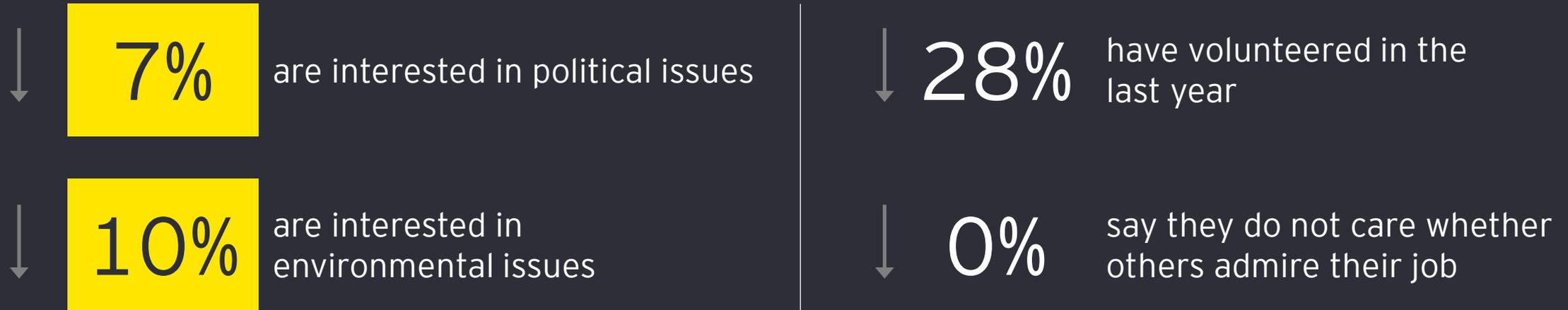
Q: How stressed or worried do you feel about each of the following? [Scale: not at all worried; somewhat worried; moderately worried; very worried; extremely worried] (average n=2,033)

↑ Said this more than any other segment

↓ Said this less than any other segment

Concerns are few and far between

The Carefree Constituents are less engaged with the world than their peers. Civic engagement is a low priority, and their view of the world is marked by a lack of interest. The upside of their general nonchalance is that they feel less stress than their peers. Strong inertia is a significant impediment to increasing their interest, and motivating them to take action or make changes will require compelling reasons. Efforts focused on winning this segment might prove unsuccessful; members of this segment are likely to follow other segments in time.



Q: In general, how interested are you in political issues? [Scale: not at all; slightly interested; moderately interested; very interested; extremely interested] (n=2,024)

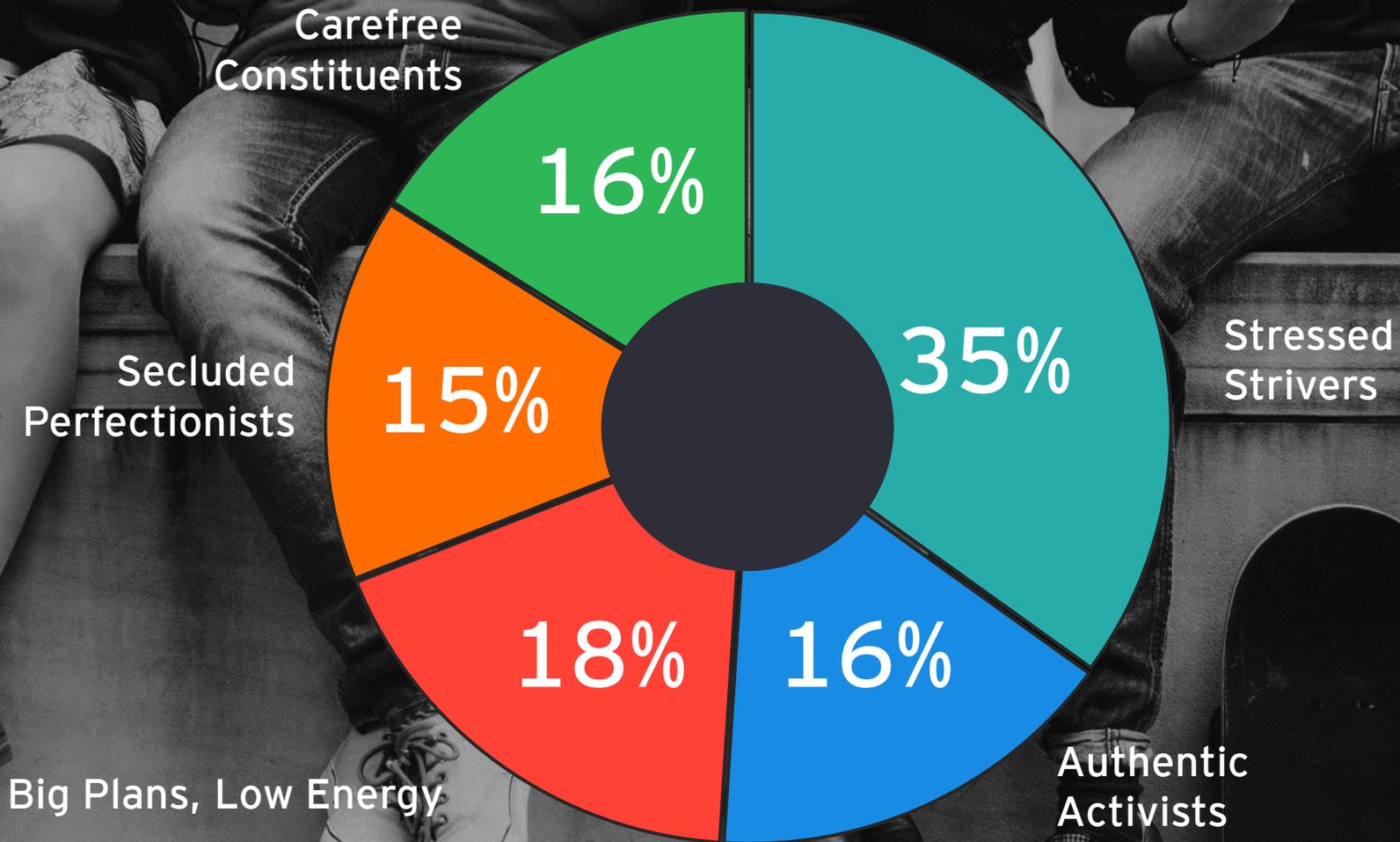
Q: What is most important to you in a future job or career? Please rank each of the following statements with 1 being the most important to you in a future job or career, 2 being the next most important, and so on. (n=2,054)

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

↑ Said this more than any other segment

↓ Said this less than any other segment

The power of five



Takeaways

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

- 1 The people of Gen Z are not all the same – they're different from each other. From other generations. From our expectations.
- 2 Gen Z reflects the changes and contradictions that persist in 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.
- 3 To meet Gen Z's needs, leading 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 the same.

Interested in learning more about Gen Z and how to connect with this group as consumers and employees? Contact EY Americas Cultural Insights and Customer Strategy Leader, [Marcie Merriman](#), and Senior Manager, [Sarah Dooley](#).

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