

How is Gen Z reshaping societal norms across the globe?

Gen Z International Research Report
June 2022



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Born between
1997 and 2007



Born between 1997 and 2007, Gen Z represent just 16% of the world's population, but they out-punch their weight in influence - and they can act as a beacon, helping companies understand what consumers and employees of all ages will come to expect.

**Global Gen Z population:
1.21 billion**

Together, Gen Z and those that follow represent 41% of the global population, and their influence and spending power will far exceed even that high percentage.

Source: UN Population Division, World Population Prospects, July 1, 2020



Methodology

Ernst & Young LLP surveyed a total of **5,000** members of Gen Z, with 1,000 from each of the following countries: China, Germany, Japan, Mexico and the United States. The online survey was completed between 4 August 2021 and 24 August 2021. To be considered a member of Gen Z, a person had to have been born between 1 January 1997 (age 25 in 2022) and 31 December 2007 (age 15 in 2022).

Gen Z segments, an international view

Like all generations, Gen Z isn't a monolith. Through our research, we identified five unique psychographic segments within Gen Z.



EY's [2021 Gen Z Segmentation Study](#) identified five groups or segments, each with different motivations, goals, priorities and dreams.

Top
10
Findings

Gen Z International
Research Report

Stress

1

Authenticity

2

Independence

3

Trust

4

Mental health

5

Future focus

6

Sustainability

7

Money

8

Workplace

9

Technology

10

01 Stress

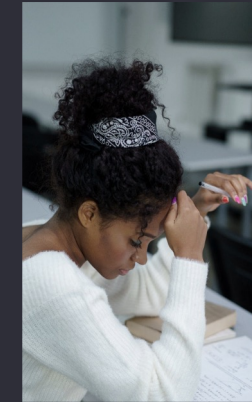
The world is stressed.

A person with curly hair, wearing a grey jacket and camouflage pants, stands with their back to the camera, looking out of a train window. The window shows a blurred interior of a train car, with a sign that says "IMMEDIATEMENT" and a poster for "FORUM". The train is moving, as indicated by the motion blur.

Gen Z carries the weight of the world on its shoulders.

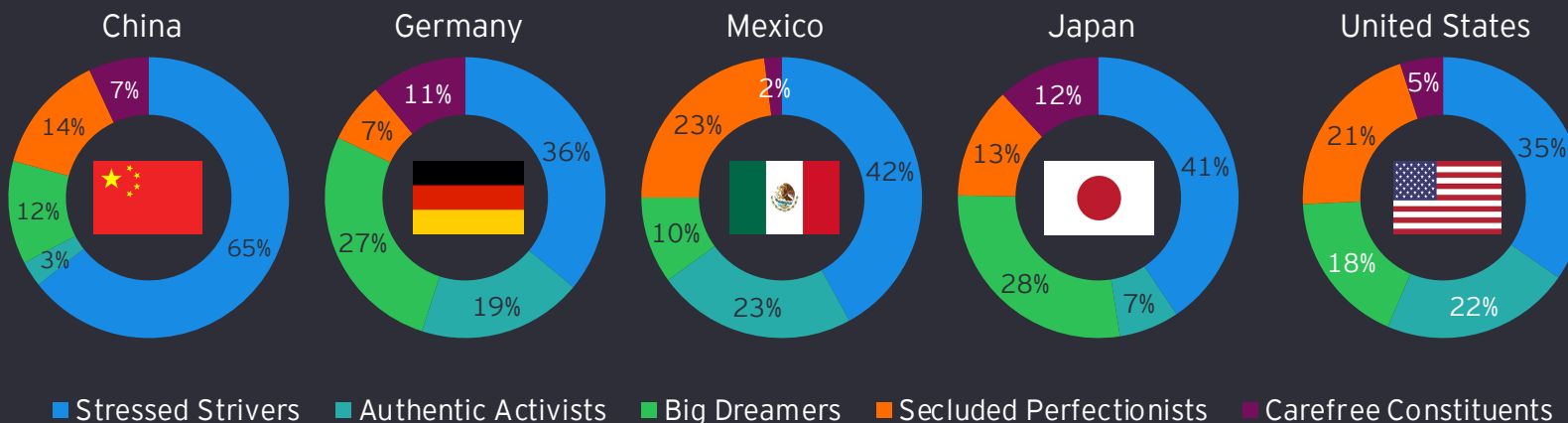
Stressed Strivers are the predominant Gen Z segment in all five of the countries surveyed, indicating that “stressed” is an accurate description for most Gen Z around the globe. This generation of doers struggles to balance their stress and worry with the inherent drive they have to make their mark on the world.

- ▶ Across all five countries, **43.8%** of respondents were classified as **Stressed Strivers**.
- ▶ In China, **65.1%** of Gen Z fell into the **Stressed Strivers group**, the highest by far.



Nearly **2/3** of Gen Z in China fall into the **Stressed Strivers** segment.

Gen Z segments, by country



What is Gen Z stressed about?

- ▶ Financial Stability
- ▶ Societal Well-Being
- ▶ Climate Change

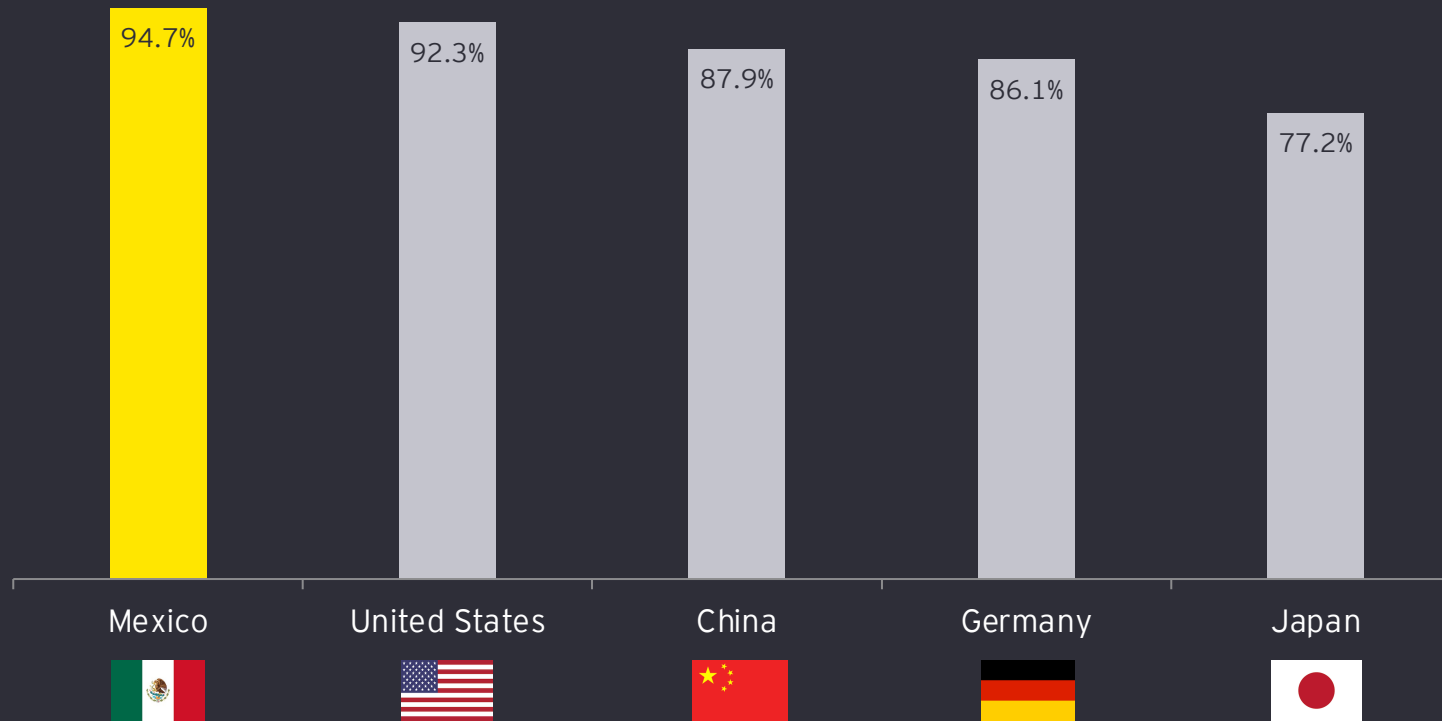
A photograph of two young women in a cafe setting. The woman on the left has short blonde hair and is wearing a light-colored jacket, holding a glass of beer. The woman on the right has dark curly hair in a bun and is wearing a reddish-brown shirt, gesturing with her hands as if speaking. The background shows shelves with various items and warm lighting.

02 Authenticity

Authenticity is Gen Z's greatest value.

Gen Z wants to be empowered to be their authentic self in all aspects of their lives.

Gen Z who think it is very or extremely important to be authentic, true to oneself:



88%

of global Gen Z think it is very or extremely important to be authentic and true to themselves. North American Gen Z in Mexico and the US were especially likely to agree.

Authentic Activists are the most likely segment to value authenticity, but not far behind are Stressed Strivers and Big Dreamers.

A person with a backpack is seen from behind, looking out over a cityscape. The person is wearing a grey hoodie and a large backpack with orange and grey straps. The city below is hazy, with buildings and a bridge visible in the distance. The sky is a pale blue.

03 Independence

Gen Z is not afraid to question past norms and reject conformity.

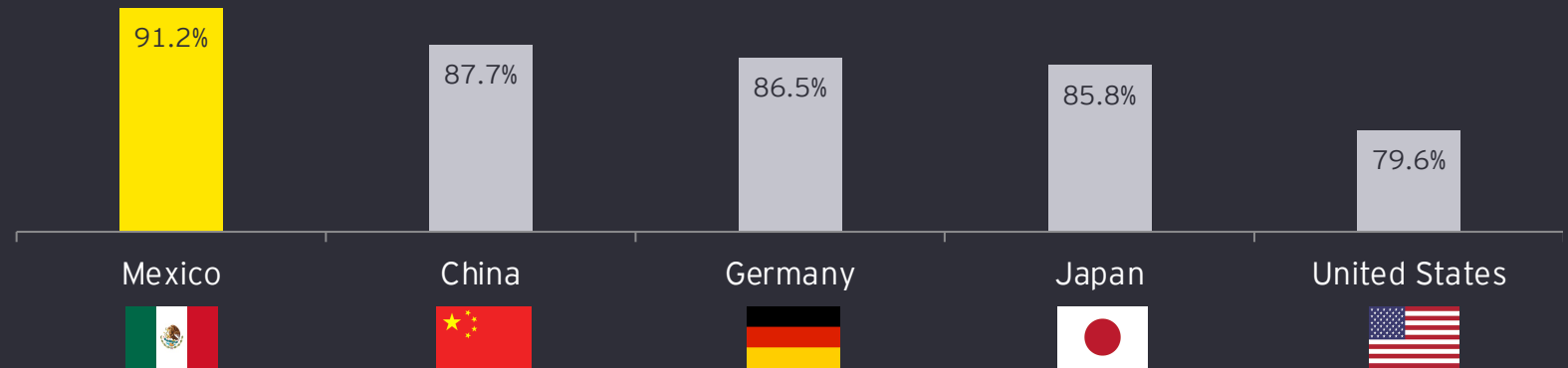
Gen Z's independence makes them less reliant on their elders than previous generations.

Constant unfettered access to information has produced a generation of go-getters who have developed the ability to learn at a rate unimaginable to past generations. These digital natives are using the tools at their fingertips to educate and influence those around them and across the globe, driving change across societies at an unprecedented pace.

86%

of Gen Z across the globe think it is very or extremely important to be independent and figure things out on their own.

How important do you think it is to be independent and figure things out on your own?
(Total % of those who responded very or extremely important.)



Respondents in Mexico are especially inclined toward independent thinking, with more than half (51%) rating independence as *extremely* important.

04 Trust

Gen Z is largely untrusting of the world around them.



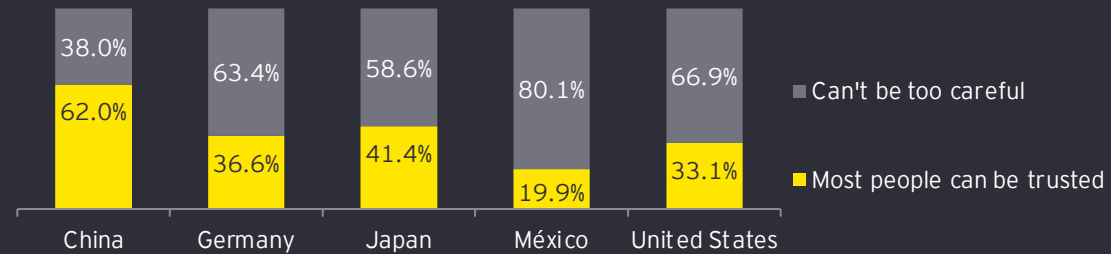
Gen Z struggles to trust people, institutions and society at large – but the degree of distrust varies by region.

While Gen Z's level of trust in others varies sharply by region (Western Hemisphere vs. Eastern Hemisphere), there is a general mindset that most people can't be trusted, with an even sharper disparity in the attitudes toward others' fairness and others' willingness to help those around them.

About 2/3 of Gen Z agreed that you can't be too careful in dealing with people.

Gen Z in Mexico and the United States are more likely to agree that you can't be too careful with people. Those in China and Japan, on the other hand, are more likely to think that most people can be trusted.

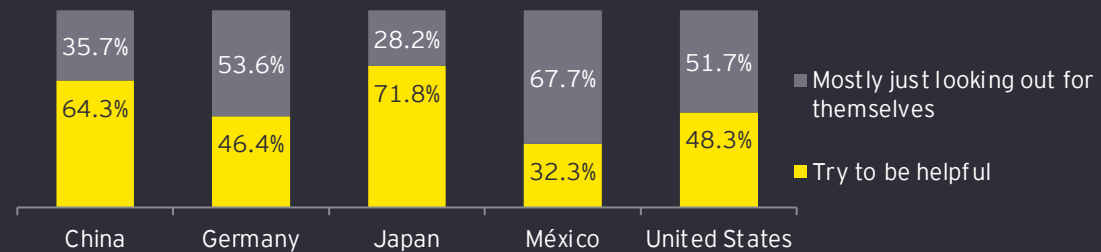
Belief that most people can be trusted, by country



Distrust is even more prevalent in the Western hemisphere.

Gen Z in China and Japan are less likely to agree that people are mostly just looking out for themselves, and that people would try to take advantage of you if they got a chance. Whereas those in Germany, México, and the United States are more likely to agree with this sentiment.

Belief that most people would try to be helpful, by country



East vs. West

This response pattern reflects society-level or cultural differences in individualism/collectivism among these countries: Eastern hemisphere countries tend to be more collectivistic or group-oriented, whereas Western hemisphere countries tend to be more individualistic or self-oriented.

A person wearing a dark winter jacket, a beanie, and colorful sneakers stands on a snowy ledge, looking out over a cityscape at sunset. The sky is a mix of orange and blue, and the city buildings are silhouetted against the light. The person's shadow is cast on the snow in front of them.

05 Mental health

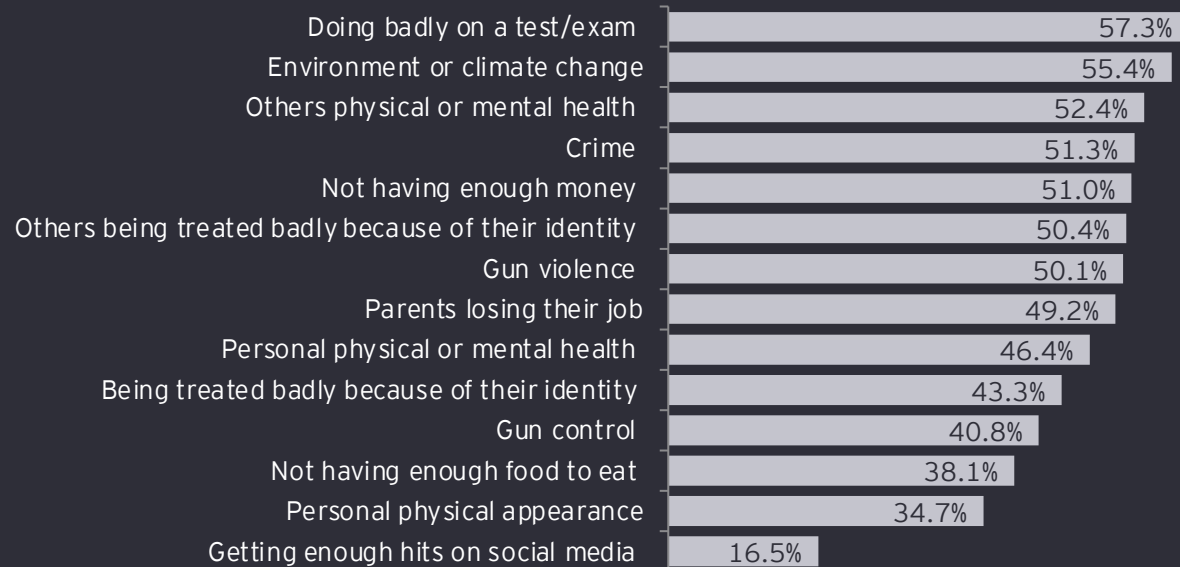
Anxiety and depression is at crisis level for this generation of pragmatists.

Gen Z is burdened with constant worry, and it has affected their mental health.

More than **1/3** of Gen Z (35.8%) from around the globe said they usually or always felt anxious or depressed since since March 2020, when global lockdowns began.

How stressed or worried do you feel about each of the following?

(Total % of those who responded very or extremely worried.)



Top 3 worries, by region:

	1	2	3
China	Doing badly on a test/exam	Environment or climate change	Not having enough money
Germany	Environment or climate change	Doing badly on a test/exam	Others physical or mental health
Japan	Crime	Doing badly on a test/exam	Not having enough money
Mexico	Gun violence	Environment or climate change	Parents losing their job Others being treated badly because of their identity
United States	Others physical or mental health	Doing badly on a test/exam	Gun violence Environment or climate change Others being treated badly because of their identity

06 Future focus

Gen Z is prepared to embody the change needed to ensure a better tomorrow.



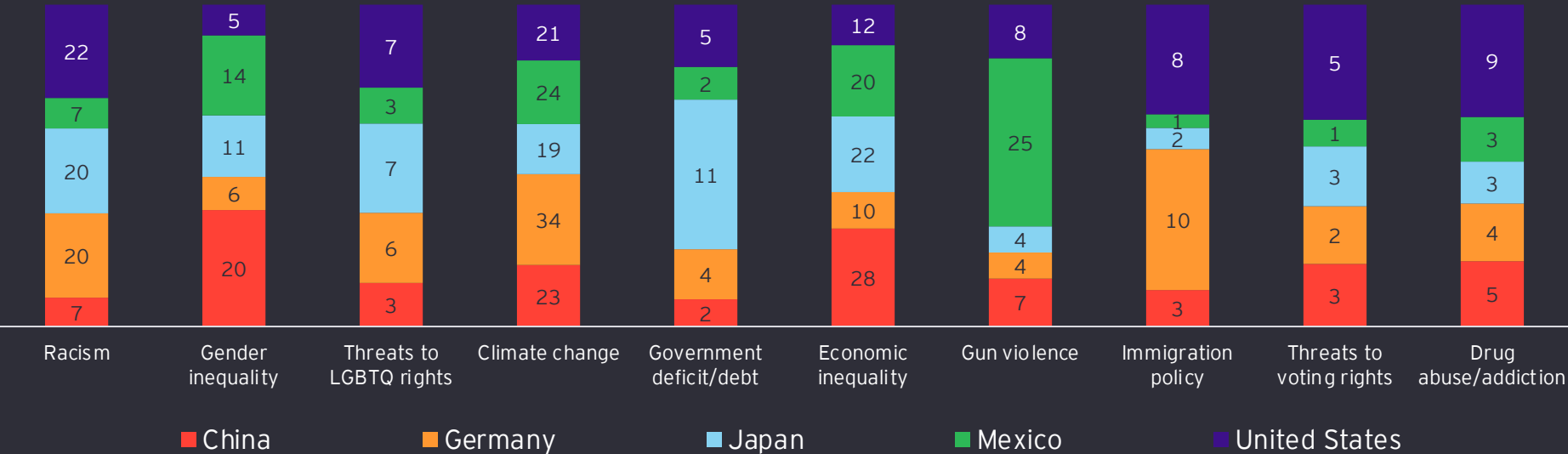
Gen Z is future-focused, and they are prepared to take action in order to achieve the future they desire and the world deserves.

83%

believe it is very or extremely important to spend time on things that will be helpful in their future.

While the core issues that unite them vary from region to region globally, Gen Z is laser-focused on enacting change. The majority (72%) of Gen Z think it is very or extremely important to change the things that are wrong in the world. Those in Mexico are especially likely to say this (89%) versus those in Japan (63%).

Most important societal issues, by country (values in %)



Most vocal about future progress are Authentic Activists, which are highest in the US, Mexico and Germany.



07 Sustainability

Climate change is an existential threat.

Sustainable practices are here to stay.

Climate change ranks as the No. 1 most important societal issue to Gen Z globally, ranking ahead of other issues such as economic inequality, racism and gender inequality. More than half (58%) of Gen Z are very or extremely interested in the environment, and nearly all (97%) would like to do more to protect the environment.

They are also putting their money where their mouth is. Most Gen Z say it is very important to buy from brands that are taking action to protect and preserve the environment - those in Mexico are especially likely to say this.

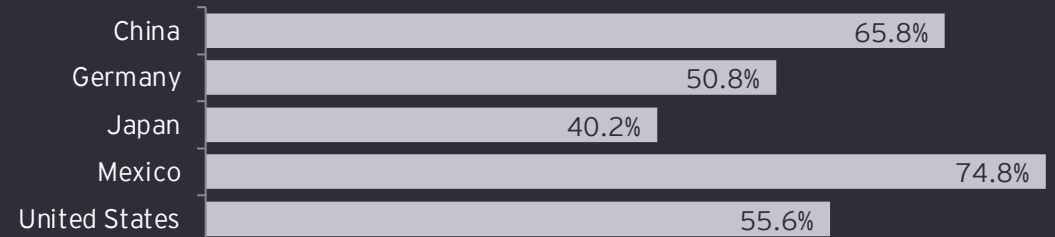
Stressed Strivers and Big Dreamers in Mexico and the United States are more likely to have received or purchased pre-owned clothing compared to those same Gen Z types in China or Japan.

Sustainable behaviors, globally

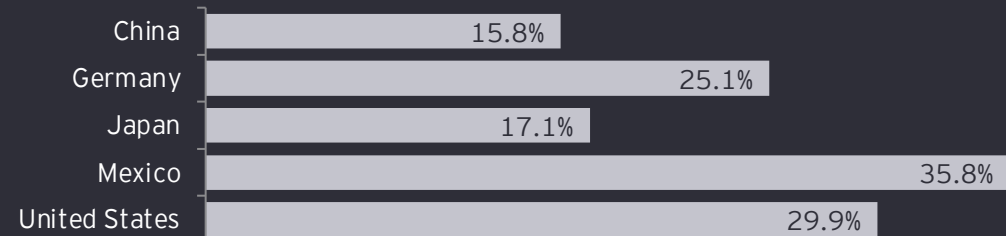
Gen Z who usually or always recycle:



Gen Z who say it is very or extremely important to buy from brands that take action to protect and preserve the environment:



Percentage of clothing bought (or bought for them) that were used or pre-owned (average) since March 2020:



A group of people, including children and adults, are planting young trees in a park. They are wearing white t-shirts and blue jeans, and some are wearing white gloves. The scene is set outdoors with a building in the background. The image is overlaid with a semi-transparent dark grey rectangle containing text.

08 Money

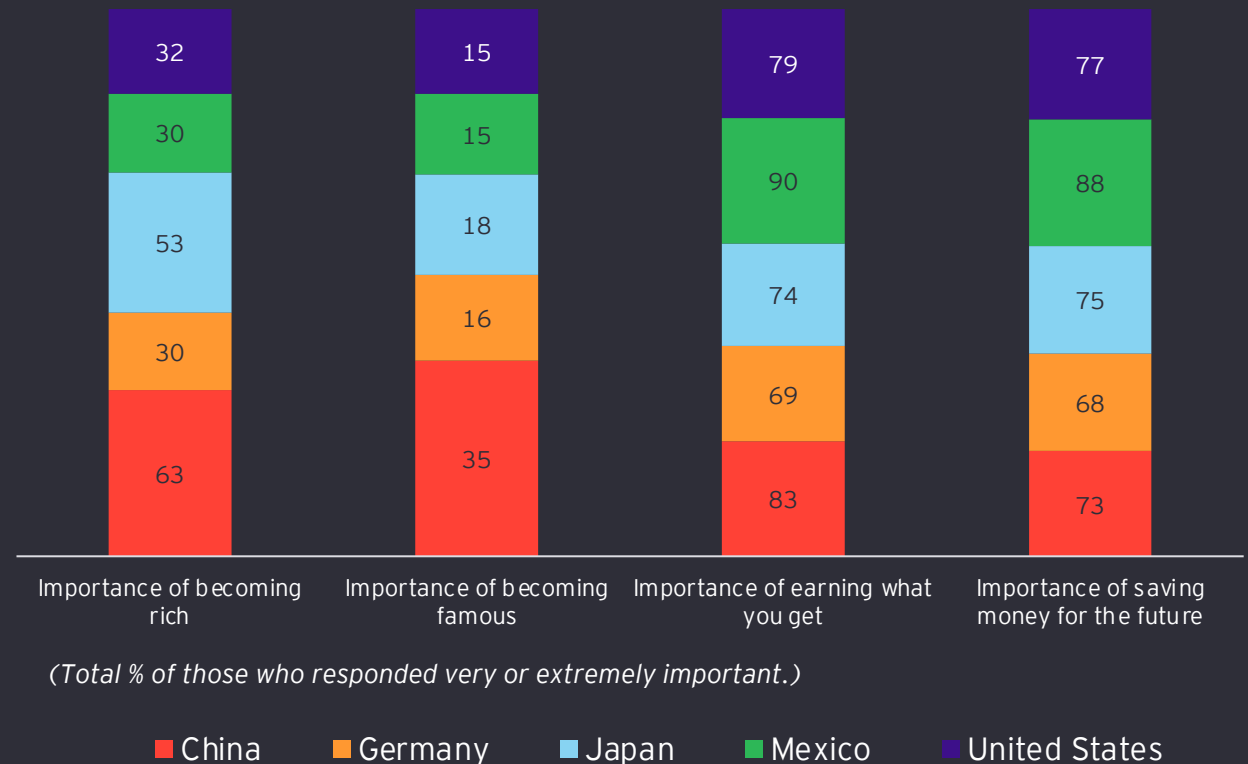
The drive for a fulfilling life outweighs the desire for material wealth.

Fame and fortune are not their drivers; they are motivated to work hard to shape a secure, stable and impactful future.

Gen Z is more concerned with securing financial stability and working to create the life they deserve than becoming rich or famous. The desire for wealth does trend notably higher, however, in the Eastern countries surveyed.

While 42% of Gen Z rate becoming rich as very or extremely important, the number is driven largely by China, followed by Japan. In total only 20% of Gen Z want to become famous, and here, too, China dominates that thinking.

More than 3/4 (77%) of Gen Z globally believe it is very or extremely important to save money to buy or do things in the future. This is producing a generation of savers who are advancing their financial literacy to ensure future success.



A group of diverse young professionals in a modern office setting. A woman in the foreground is pointing at a presentation board. Other people are looking on with interest. The scene is brightly lit with modern office decor.

09 Workplace

Gen Z's career ambitions are a reflection of their belief system.

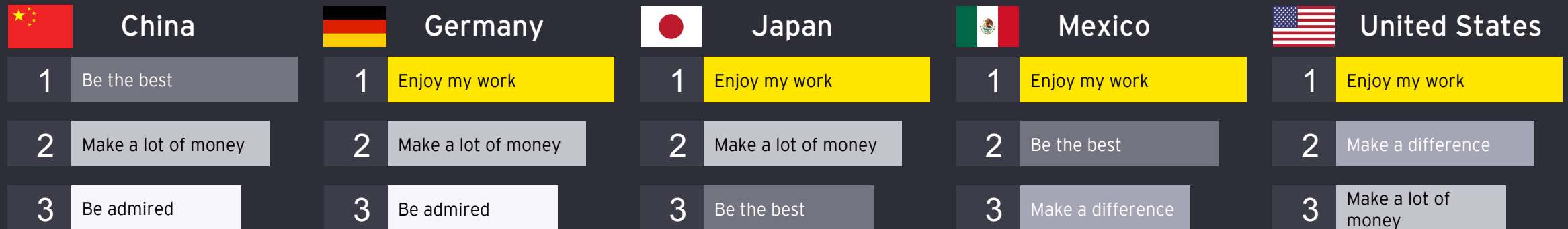
Gen Z prioritizes a career that offers fulfilment and aligns with their values, rather than just a source of income.

Most Gen Z prioritize wanting to enjoy the work they do in a future job or career. The exception lies in China, whose high volume of Stressed Strivers aim to be the best at what they do above all else.

Nearly 2/3 (64%) of Gen Z say it is very or extremely important to work for an employer who shares their values.

Chasing work flexibility and a sense of purpose, almost half of Gen Z (44%) say they are very or extremely likely to start their own business someday. That figure jumps to 77% in Mexico.

What is most important to Gen Z in a future job or career?



A woman wearing a VR headset is standing in a modern living room, smiling and holding a small object in her hand. She is wearing a white polka-dot t-shirt and dark leggings. The room features a grey sofa with a blue floral pillow, a wooden coffee table with plants, and a yellow shelving unit in the background.

10 Technology

Social media is Gen Z's lifeline to friends and the world - it is their communication default.

Gen Z expects social media to provide them with a seamless connection to the world






More than half of Gen Z increased their digital talking and video chatting with friends during the pandemic, relying on digital communications to forge and maintain connections.

Perhaps not surprisingly, nearly all Gen Z report using at least one social media platform with most using more than one.

Gen Z's attitudes towards social media vary, but they are united in their use of social apps as the default for staying in touch with others.



Top Gen Z social media platforms, by country

 China	 Germany	 Japan	 Mexico	 United States
1 Wechat	1 Instagram	1 Instagram	1 Facebook	1 Instagram
2 QQ	2 TikTok	2 Twitter	2 Instagram	2 Snapchat
3 Douyin	3 Snapchat	3 TikTok	3 TikTok	3 TikTok

A person wearing a grey cap and a backpack is walking away from the camera down a busy city street. The street is filled with cars, buildings, and other pedestrians, creating a sense of a bustling urban environment. The image is slightly blurred and has a dark overlay to make the text stand out.

What does this mean for the future of business?

As business assumptions are challenged and the pace of change continues to accelerate, understanding Gen Z will help give you a view into what's "next."

By understanding Gen Z we can proactively look ahead to predict broader societal shifts and anticipate implications for businesses and governments.

What does this mean for the future of business?

Social for communication

Gen Z will be early adopters and will push new technologies further into the mainstream. Businesses must embrace digital transformation and disruptive technologies in order to meet Gen Z evolving expectations, which set the pace for all generations.

Trust, transparency and authenticity

Gen Z sniffs out inauthenticity with ease. They won't overtly demand trust and transparency, but they will silently block you (literally and figuratively) from their lives and will be quick to call out wrongful actions. Trust will only be earned through complete transparency.

Intentional consumerism

Gen Z gravitates to brands that share their values, while quickly dismissing those that don't. This will hit businesses' bottom lines quicker than they think given their unprecedented access to information and their innate ability to use it, influencing others along the way.

Mental wellness

Gen Z is high-stress and anxiety-ridden, but they are open and willing to address mental health as an issue. Companies must recognize the need for Gen Z to find holistic outlets for mind, body and spirit in all aspects of their lives to help them bring their best selves to work and into the world.

Purpose and ESG

Gen Z views environmental, social and corporate governance as baselines for consideration. Companies must consider its role in every part of the business - from sourcing and packaging to internal operations, footprint and investments.

Workplace culture

Gen Z prioritizes finding fulfilling careers where they are valued and can have impact, versus making a lot of money. Their employment will be promiscuous, unless a company aligns with their personal values and makes them feel as if they are contributors and help them grow.

Future-focused action

Gen Z has inherited a world on fire and is passionate about taking control of their future. They are not afraid to reject conformity and pave their own path. Winning companies will become Gen Z allies, helping them right the wrongs they see around them.

Diversity rules

Gen Z is not a monolith. Nuances exist within the generation and between countries. Success requires a deep understanding of the Gen Z you are targeting and those they influence.

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