2019

U.S. YOUTH OUTLOOK
PREPARING FOR THE CENTENNIAL FUTURE

LINDSAY KUNKLE
VP, HEAD OF YOUTH CONSULTING
AUGUST 2019
What we will cover today

WHO THEY ARE

COLLEGE & LIFE PLANNING

SPARE TIME & CONNECTIONS

MEDIA & PERSONAL EXPRESSION

WELLBEING (HEALTH & FINANCIAL)
WHO THEY ARE

CENTENNIALS ARE REINVENTING THE YOUTH LIFESTAGE
Centennials 101

**BORN**

1997-2009

**AGES 10-22 IN 2019**

17% OF THE UNITED STATES POPULATION

OVERALL

54.9 MILLION TOTAL POPULATION

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**IN 2019**

6%

ASIAN AMERICAN

2%

OTHER

16%

AFRICAN AMERICAN

25%

HISPANIC

51%

NON-HISPANIC WHITE

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**U.S. Census**
STARTING POINTS
STARTING POINTS ARE THE EXPERIENCES THAT EVERYONE IN A GENERATION SHARES

THESE ARE THE EVENTS THAT DEFINE THE CULTURAL CONVERSATION
<table>
<thead>
<tr>
<th>Generation</th>
<th>Born Between</th>
<th>Formative Years</th>
<th>Core Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>BABY BOOMERS</td>
<td>1946 and 1964</td>
<td></td>
<td>• Self-Absorption</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• Individuality</td>
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<td></td>
<td></td>
<td></td>
<td>• Youthfulness</td>
</tr>
<tr>
<td>GENERATION X</td>
<td>1965 and 1978</td>
<td></td>
<td>• Pragmatism</td>
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<td>• Family-First</td>
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<td></td>
<td></td>
<td></td>
<td>• Self-Reliance</td>
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<tr>
<td>MILLENNIALS</td>
<td>1979 and 1996</td>
<td></td>
<td>• Authenticity</td>
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<td></td>
<td></td>
<td></td>
<td>• Authorship</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• Autonomy</td>
</tr>
</tbody>
</table>
CENTENNIAL STARTING POINTS
(1997-2009)

MAJOR THEMES
Disruption and Uncertainty
Connection and Expression
Identity and Openness
Age of the oldest Millennial:
- 1995: 19
- 1998: 23
- 2002: 25
- 2004: 26
- 2005: 28
- 2007: 31
- 2010: 33
- 2012: 35
- 2014: 35

Age of the oldest Centennial:
- 1995: 1
- 1998: 5
- 2002: 7
- 2004: 8
- 2005: 10
- 2007: 13
- 2010: 15
- 2012: 17
- 2014: 17
Millennials vs. Centennials: NEAT VS. NUANCED

Millennial Disney Princesses

Centennial Disney Princesses
APRIL/MAY 2003

MAY 2016
I care a lot about whether my clothes are in style

48%  
Centennials 2016

62%  
Millennials 1999
CORE VALUES

OPENNESS
“You do you” is their motto; give yourself and others permission to be different and to express those differences in whatever way seems fit.

RESILIENCE
Hard work and grit are key to success; roadblocks are inevitable, so be prepared to overcome them.

REALISM
Limits and constraints are a part of life, so keep expectations about yourself and the way the world works grounded.
COLLEGE & LIFE PLANNING

FOCUSED ON THEIR FUTURE, CENTENNIALS ARE LOOKING TO EDUCATION AS PART OF A LARGER PLAN TO GET AHEAD IN LIFE.
Future view of higher education

I am planning to attend a college/university in the future (among those with a high school degree or less)

- Total: 77%
- Males: 78%
- Females: 76%
- 12-15 year olds: 77%
- 16-17 year olds: 80%
- 18-21 year olds: 66%
- Non-Hispanic White: 76%
- African American: 72%
- Hispanic: 79%

2018 U.S. MONITOR, Q3
Compared to Millennials, Centennials are more receptive to classroom learning

I can learn more on my own than I can in a classroom

51% 64%

Centennials Millennials
All learning options should be considered

__________ is a smart way to get an education without spending too much

93%

Going to a community college

83%

Getting an online degree
Cost and educational program availability are priorities

Very important in deciding which college to attend
(among those planning to attend in the future)

- Cost of tuition: 84%
- Scholarship/Financial Aid: 76%
- Educational programs: 76%
- Location: 63%
- Job placement: 57%
- Admission standards: 52%
- Reputation: 51%
- Career counseling: 46%
- Student life/community: 45%
- Housing: 45%
- Size: 38%
- Parent's influence: 29%
- Religious affiliation: 23%
- Athletic programs: 22%
- Greek life: 5%

2018 U.S. MONITOR, Q3
Cost and educational program availability are priorities

Very important in deciding which college to attend
(among those planning to attend in the future, comparison vs. 2014)
Centennials have high expectations for college.

_____________ completely describes what going to college is all about

- Getting the best education possible: 51% (Centennials), 27% (Millennials)
- Learning skills to get the best job possible: 49% (Centennials), 23% (Millennials)
- Broadening your perspective and having new experiences: 48% (Centennials), 32% (Millennials)
- Making connections to get a job or internship: 30% (Centennials), 26% (Millennials)
- Learning how to become an adult: 26% (Centennials), 16% (Millennials)
- Making new friends and having as much fun as possible: 15% (Centennials), 17% (Millennials)
Centennials approach life with a critical, *hacker* mindset.

**MILLENNIAL APPROACH**
Spontaneous, Short-term View

- What do I want to do with my life?
- I’ll figure it out as I go

**CENTENNIAL METHOD**
Flexible, Prepared plan

- What do I want to do with my life?
- I have a solid plan
And, they want to be seen as leaders, ready to take charge

Important to the way others see you

- Someone whose integrity is beyond question: 81%
- Someone who knows how to get things done: 82%
- Someone who bounces back from adversity well: 75%
- Someone who handles stress well: 73%
- Someone who can always see through exaggeration and hype: 69%

Only 4% of Centennials say they want to “avoid responsibility for as long as possible”
They feel empowered to take charge and make a difference in their own lives

I feel I can make a difference to the world through the choices I make and the actions I take

72% 63%

Centennials Millennials

2018 Global MONITOR, U.S. sample
But they also expect brands and institutions to play a role in addressing issues that are important to them.

Businesses should play a leading role in addressing the social issues that are important to their customers.

- **Centennials**: 84%
- **Millennials**: 78%

Brands play an important role in society and are responsible for making it better.

- **82% of Centennials**
Where can you give students the opportunity to feed into the learning experience to put their hacker mentality and leadership skills to test?

As a purpose-driven generation, how can you connect to key issues and passion points of potential and incoming students?
SPARE TIME & CONNECTIONS

THE PARTY CULTURE OF MILLENNIALS IS TAKING A BACKSEAT TO MORE LOW-KEY EXPERIENCES
Fun does not define Centennials, but that doesn’t mean they are not having a good time.

Best describes my generation: “We’re about fun”

- Millenials 2000: 52%
- Centennials 2016: 20%

But

59% of Centennials say “I have fun every day”
They are just rethinking how they spend their free time

69% of Centennials say partying is “overrated”

79% of Centennials would rather stay in with a group of friends than go out

2017 U.S. MONITR, Q4; 2018 U.S. MONITOR, Q1
They prioritize activities that allow them to bond and connect, not just let loose.

When I’m with friends, we often…

- 62% of Centennials vs. 58% of Millennials talk about personal issues or worries.
- 57% of Centennials vs. 51% of Millennials talk about people we know.
- 38% of Centennials vs. 52% of Millennials watch TV, videos or movies.
- 37% of Centennials vs. 45% of Millennials listen to music.
- 26% of Centennials vs. 30% of Millennials work on a shared hobby or interest.
- 22% of Centennials vs. 27% of Millennials talk about pop culture.
- 11% of Centennials vs. 20% of Millennials post on social media.

2018 U.S MONITOR; Q1
Centennials value experiences

63% of centennials say “Prioritizing experiences over material possessions is important in my personal life.”

“I think the point of an experience at this age is that it allows us to escape the monotony of everyday life or the material goods we already have, and it allows us to do something more rewarding with our time.”

—YOUTH STREETSCAPER, AGE 18
Specifically, they seek experiences that are memorable and novel

The 3 most important things I look for in an experience:

- Are memorable: 51%
- Expose me to something new and exciting: 41%
- Make me feel relaxed and recharged: 31%
- Help me grow or accomplish things: 29%
- Connect me with others: 27%
- Provide an escape: 27%
- Allow me to help others: 21%
- Help me express my creativity: 20%
While they recognize the connection technology brings, they are not blind to its downsides

Technology has made us feel more connected to each other

68% of Centennials

It doesn’t bother me if someone’s checking their phone when we’re having a conversation

30% of Centennials

With certain friends, we both realize that our phones are a distraction and make an agreement to stay off them to spend time together. This ‘system’ allows us to get the quality time together we need, and I have noticed I have stronger relationships with these people.

– HENRY, 15 YOUTH STREETSCAPER
Relationships with family are a key priority for younger consumers

I am closer to my parents, than they are / were to theirs

- 69% Centennials
- 67% Millennials
- 53% Xers
- 42% Boomers

2017 U.S. MONITOR
And they’re thinking about how to further these connections

I wish my family spent more time doing things together as a group

67% of Centennials

I feel a need to preserve my family’s cultural traditions

75% Centennials

73% Millennials
THOUGHT STARTERS

As this generation redefines their downtime, how does the college experience change at University of Arizona?

What new resources, spaces, or traditions can you start to align with students’ wants and needs?
MEDIA & PERSONAL EXPRESSION

TRADITIONAL MEDIA IS BEHIND THE CURVE AS CENTENNIALS LOOK TO EXPRESS THEMSELVES.
Today’s youth spend less time watching television, and far more time watching their phones...

<table>
<thead>
<tr>
<th>Total Pop.</th>
<th>Watch limited online video and TV</th>
<th>Watch limited online video but a lot of TV</th>
<th>Watch limited TV but a lot of online video</th>
<th>Watch a lot of both online video and TV</th>
</tr>
</thead>
<tbody>
<tr>
<td>19%</td>
<td>33%</td>
<td>25%</td>
<td>23%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age 16-34</th>
<th>Watch limited online video and TV</th>
<th>Watch limited online video but a lot of TV</th>
<th>Watch limited TV but a lot of online video</th>
<th>Watch a lot of both online video and TV</th>
</tr>
</thead>
<tbody>
<tr>
<td>20%</td>
<td>16%</td>
<td>38%</td>
<td>26%</td>
<td></td>
</tr>
</tbody>
</table>
...And, their attention spans are alarmingly brief

**CENTENNIALS SKIP ADS IN 9.5 SECONDS**

1.4 seconds faster than Millennials
3.1 seconds faster than Gen X

**CENTENNIALS CLICK FAST AND THEY CLICK OFTEN**

Attitude: “I skip ads whenever I can”

<table>
<thead>
<tr>
<th>Device</th>
<th>Centennials</th>
<th>Millennials</th>
<th>Gen X</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer</td>
<td>56%</td>
<td>50%</td>
<td>49%</td>
</tr>
<tr>
<td>Mobile</td>
<td>47%</td>
<td>40%</td>
<td>37%</td>
</tr>
</tbody>
</table>

Kantar Millward Brown AdReaction
Traditional news sources also face increasing skepticism from a youth generation that pays close attention.

It's getting harder to tell what's true and not true in the media today.

89% of Centennials

I don't believe there [are] any neutral news organizations. Each writer and editor has their own personal bias. What they write, even if it’s a little biased, it’s still biased.

EMMA NEELY
AGE 19

The Atlantic: Trump Has Changed How Teens View the News
Centennials are focused on the real life

Types of stories you prefer to see in entertainment/advertisements

| Stories of people living realistic, balanced lives | CENTENNIALS | 55% | MILLENNIALS | 46% |
| Stories where people achieve all their hopes and dreams | 45% | 54% |
And they want to see people like themselves

68% of Centennials of color say: “not enough brands do a good job representing people similar to me or my community”

“I choose brands that make an effort to be diverse and inclusive in their communications”

58% 68%
Total sample Centennials

Being Latinx and nonbinary and seeing Glossier’s products cater to others like me makes me want to purchase from them even more ... Glossier always says ‘inspired by real life’ and in real life, you can no longer only make products targeted for women because no reality is gendered. What the brand is doing is really admirable.

—Elisa, age 16
Centennials want to express themselves, but sometimes feel they cannot do so

I would like to participate in more activities that celebrate my culture and heritage

- Total sample: 62% (Non-Hispanic White: 53%) 80% (African American: 79%) 73% (Hispanic: 81%) 80%
- Centennials: 53% (Non-Hispanic White: 46%) 79% (African American: 73%) 73% (Hispanic: 81%) 80%

I am often in situations where I feel I need to suppress how I express my identity

- Total sample: 62% (LGBTQ+: 46%) 40% (African American: 40%) 40% (Hispanic: 38%)
- Centennials: 46% (LGBTQ+: 52%) 40% (African American: 46%) 38% (Hispanic: 38%)
Centennials develop unique, multi-faceted identities for themselves

<table>
<thead>
<tr>
<th>Important to my personal identity among Centennials</th>
<th>79%</th>
</tr>
</thead>
<tbody>
<tr>
<td>My family</td>
<td>77%</td>
</tr>
<tr>
<td>My education</td>
<td>62%</td>
</tr>
<tr>
<td>My gender</td>
<td>56%</td>
</tr>
<tr>
<td>My sexual orientation</td>
<td>43%</td>
</tr>
<tr>
<td>My generation</td>
<td>39%</td>
</tr>
<tr>
<td>My race/ethnicity</td>
<td>37%</td>
</tr>
</tbody>
</table>

“I select brands that represent my unique taste and individuality” among Centennials

Today, *gender is becoming a looser term* and more people are categorizing themselves in genders other than male and female. This is leading to more people questioning what gender truly is and why society makes such a big deal about it.

—YOUTH STREETSCAPER, AGE 18
Centennials seek out platforms that allow them to express their unique selves …

Videos created by individual people online are often better than shows created by big media companies

Whenever possible I prefer to use emojis, gifs, and images rather than words when texting on my smart phone (among those who have a smart phone)

64% OF CENTENNIALS

58% OF CENTENNIALS

you can say anything as long as you put the right emoji next to it.
... And provide them freedom to engage with the world around them more organically.
What if instead of turning here...  ... they turn there
MEDIA

30% OF CENTENNIALS
Currently own a smart speaker

42% OF CENTENNIALS
Frequently or occasionally use a voice controlled connected device

So how do you communicate with them?

FIND YOUR BRAND’S VOICE

“How do you advertise in a voice environment? What does Dove sound like? I don’t know. Dove doesn’t really have a voice.”

KEITH WEED
CMCO, UNILEVER

UTILIZE YOUR SKILLS

Zyrtec’s Daily AllergyCast Alexa Skill acts as a weather app, with the added information of pollen counts for those with allergies.

VISUAL AIDS

Harper Collins promoted their new cookbook with a scented outdoor ad in London.
THOUGHT STARTERS

How can you *highlight the unique identities of your students* and further build out opportunities for prospective students to express themselves?

What does University of Arizona need to do to start *creating a voice strategy*?
The pursuit of health and happiness

What do you consider to be the most important aspect of your own wellbeing?

- Your physical health
- Your mental health
- Your spiritual health

43% 44% 45%
41% 45% 40% 40%
40% 20% 33% 22%

Centennials Millennials Xers Boomers

Yale’s Most Popular Class Ever: Happiness
Life today has become much too complicated

I often wish things in my life would slow down

66% of Centennials

69% of Centennials

Say being busy is overrated

58% of Centennials
....is leading to pressure from all aspects of life

Pressures affecting Centennials

Do well in school: 97%
Be healthy: 86%
Be more self-reliant: 82%
Stay positive and upbeat: 79%
Look good: 77%
Make a lot of money: 76%
Define what I stand for: 75%
Drive change in society: 65%
Have the latest technology: 61%
Have the latest clothes: 60%
Get a lot of likes/follows on social media: 44%
A different magnitude of pressure

**Centennials**
- **My Grades**: I don’t want to get in trouble
- **How I Look**: I need to wear the right brands
- **My Friends**: I need to fit in with the right clique
- **The World Around Me**: I keep up with pop culture
- **Making Money**: I keep up with everything – from pop culture to serious news
- **My Future**: I’m focused on getting into college
- **I’m Gaining New Freedoms**: I’m focused on building a solid foundation – from college to beyond

**Millennials**
- **My Grades**: I don’t want to jeopardize my future
- **How I Look**: I need to create a unique identity
- **My Friends**: I need to find my people
- **The World Around Me**: I keep up with pop culture
- **Making Money**: I’m focused on college or long-term savings
- **My Future**: So I can have fun with my friends
- **I’m Gaining New Freedoms**: So I can prepare for the future
- **When Something Embarrassing Happens**: The whole world knows
Centennials understand the true cost of stress

Keeping stress at a manageable level: Important to me to maintain health (Top-2 Box)

- 69% Centennials
- 67% Millennials
- 63% Xers
- 51% Boomers

Paralyzing overwhelm

Number of Undergraduates who reported feeling “overwhelming anxiety”

61% in 2018 from 50% in 2011

And the staggering human cost

28% Increase in the suicide rate over the last 17 years

*2nd leading cause of death among people ages 10-34
But, managing these pressures—no matter where they come from—is a challenge

I manage the stress I put on myself well

27% among Centennials

I manage stress from the outside world well

27% among Centennials
They turn to screens to ease stress, but also recognize the need to tackle their problems head on

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unwind with a movie, TV show, or music</td>
<td>51%</td>
</tr>
<tr>
<td>Deal with/face what’s stressing me</td>
<td>37%</td>
</tr>
<tr>
<td>Eat</td>
<td>36%</td>
</tr>
<tr>
<td>Talk with someone</td>
<td>35%</td>
</tr>
<tr>
<td>Do housework</td>
<td>32%</td>
</tr>
<tr>
<td>Exercise</td>
<td>30%</td>
</tr>
<tr>
<td>Involve myself in a hobby</td>
<td>30%</td>
</tr>
<tr>
<td>Practice mindfulness/meditate</td>
<td>25%</td>
</tr>
</tbody>
</table>
They are leading a mindset shift in...

MENTAL HEALTH AWARENESS

85% OF CENTENNIALS
We need more accessible mental health services in this country*

KANTAR

2018 U.S. MONITOR
... And asking critical questions for their mental wellbeing: where’s the fun?

The culture of sports today puts **too much pressure** on winning and losing instead of fun

<table>
<thead>
<tr>
<th>CENTENNIALS</th>
<th>77%</th>
</tr>
</thead>
</table>

The culture of sports today puts **too much emphasis on fun** instead of winning and losing

| 23% |
Centennials understand that food is a significant driver of good and bad health

“Eating a well-balanced diet is important in maintaining health” among Centennials

How much input do you have on family buying decisions? among Centennials

- A lot: 32% (What groceries to buy) 30% (Where to go out to eat)
- Some: 57% (What groceries to buy) 62% (Where to go out to eat)
- None: 7% (What groceries to buy) 4% (Where to go out to eat)

62%
And they expect snacks and meals to be designed around their health needs.

46% of Centennials currently have a specialized diet.

<table>
<thead>
<tr>
<th>Diet Type</th>
<th>39%</th>
<th>21%</th>
<th>27%</th>
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</thead>
<tbody>
<tr>
<td>LOW-SUGAR</td>
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<tr>
<td>PALEO</td>
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</tr>
<tr>
<td>HALAL</td>
<td>47%</td>
<td>55%</td>
<td>35%</td>
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<tr>
<td>ORGANIC</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>VEGETARIAN</td>
<td></td>
<td>38%</td>
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<tr>
<td>KOSHER</td>
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<tr>
<td>LOW-CARB</td>
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<tr>
<td>GLUTEN-FREE</td>
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<td>DAIRY-FREE</td>
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<tr>
<td>VEGAN</td>
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<tr>
<td>GMO-FREE</td>
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How often do you eat, drink or take ___ to improve your wellbeing among Centennials?

- Regularly
- Occasionally
- Never

Kreation juices and smoothies are designed with both mental and physical health in mind. Ingredient benefits are clearly spelled out, and each product is recommended for specific health needs.
Finances have a strong link to overall wellbeing

I started/plan to start teaching my child(ren) about spending and saving money when they turn ...

Among parents with children under age 18

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;3 years</td>
<td>10%</td>
</tr>
<tr>
<td>4-7 years</td>
<td>39%</td>
</tr>
<tr>
<td>8-11 years</td>
<td>31%</td>
</tr>
<tr>
<td>12-15 years</td>
<td>16%</td>
</tr>
<tr>
<td>16+</td>
<td>4%</td>
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</tbody>
</table>

Taking steps to minimize risks with my money is very/extremely important in my personal life

among Centennials

<table>
<thead>
<tr>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>66%</td>
</tr>
</tbody>
</table>

Saving money is about controlling my day-to-day spending habits

among Centennials

<table>
<thead>
<tr>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>74%</td>
</tr>
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</table>
Being financially stable is important to creating a happy family life among Centennials.

98% say it’s VERY important.

I definitely don’t plan on having children in five years, but I would in 15 years (when I’m 33). I would not like to have kids when I am in my early or mid-twenties because I will like enjoying my freedom as a young adult, and I *want to prioritize finding a good job* that I am passionate about and want to stay at.”

—YOUTH STREETSCAPER, AGE 18

Sharing Tribes allows workplace organizations to log into their own private network where coworkers can trade goods and services. It also lets coworkers volunteer their skills or lend their goods to one another.
THOUGHT STARTERS

What kinds of support and tools can you give students to create a calmer lifestyle? What resources already exist that you can further market?

How can you engage Centennials in discussions around college costs to promote financial wellbeing?
THANK YOU!

QUESTIONS? CONTACT:
Lindsay Kunkle, Head of Youth Consulting
Lindsay.Kunkle@kantar.com