Foreword

In the proper context, “change” is one powerful word. President Obama used “change” in not one, but two campaign slogans and, of course, it was the centerpiece of a “brilliant” Homer Simpson observation: “I guess some people never change. Or, they change and then quickly change back.”

The element and certainty of change was the impetus for “Generation Nation: Values & Attitudes.” And the point of this ambitious report — which deep dives in America’s big-four generations, Baby Boomers, Generation X, Millennials and Generation Z — is to not merely confirm that America is changing at a rapid pace, but to provide context around that change to develop a richer, fuller grasp of how change has impacted each generation. This knowledge is absolutely essential for marketers if they wish to remain relevant to the consumer base they depend on.

From our many years at TRU — the industry expert on young people — we understood teens (and their parents) like no one else. As Millennials and Gen Xers have grown, so, too, have we, and we’ve become deeply immersed in the lives and lifestyles of Baby Boomers and their Gen Z grandchildren, as well. We’re able to understand each in isolation and where they intersect with their younger or older cohorts, contextualizing each generation’s attitudes and values within the broader American population.

With all that in mind, it’s our pleasure and, we feel, our obligation, to give these four generations a proper voice and do so in a way that’s manageable and actionable for you.

And this is only the beginning. Soon, we’ll be introducing studies that dive more deeply into key verticals and categories (such as Multi-Cultural, Health, Retail & Shopping, among others). And yes, we’ll repeat the flagship “Generation Nation” study over time to track how things evolve or, shall we say, change.

In the meantime, enjoy the study!

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HOW THE REPORT IS ORGANIZED:

Key Findings
• An overview about the role of Generation vs. Lifestage
• Generational profiles highlighting what’s real vs. stereotypical
• At-A-Glance summaries with learnings across eight important facets of Americans’ lives, including:
  • Key charts and graphs supporting our findings
  • Whether they’re “walking the walk” by matching attitudes with behaviors
  • “Consider This” implications — thoughts on how to leverage learnings to better resonate with these generations
  • “Common Threads” — ways to span generations by targeting a common mindset

Detailed Findings
• With question-by-question analysis, charts and data tables
Generation Nation: Values & Attitudes

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About the Firm

747 Insights is a boutique research firm that helps businesses, associations, and educational institutions better understand and make meaningful connections with Boomers, Generation X, Millennials and Gen Z. Founders Kate Danaj and Michael Wood first collaborated as senior researchers at TRU, the pioneers in youth research. With more than 25 years’ collective experience studying these cohorts, they reteamed to form 747 Insights. Together they bring a unique depth of generational expertise based on their vast experience consulting with the world’s leading brands and organizations across numerous product and service categories.

In addition to the “Generation Nation” series of syndicated studies, 747 Insights also offers full custom research capabilities. The firm applies traditional and innovative approaches to both qualitative and quantitative research designs bringing fresh insights and a delightful client experience to every project.
Research Methodology

747 Insights collaborated with the experts at Researchscape International to field this study. Researchscape surveyed 4,150 respondents using an online survey in order to better understand behavior, usage and attitudes among four generations (aged 13 to 71).

The survey was fielded from June 9 to June 19, 2017. Due to the length of the survey, respondents were randomly divided into two cohorts and each shown slightly more than half the questionnaire. The median time to complete the survey was 16 minutes.

Respondents to the survey were recruited from a range of reputable sources. Respondents were quota-sampled using 72 different cells (gender by age by region) to closely match the overall national population of those aged 13 years old and up. The survey was fielded in both English and Spanish.

The analysis includes only those respondents who completed the entire questionnaire shown to them (based on answer validation, branching, and skip patterns). The survey results were not weighted.
# Demographics

<table>
<thead>
<tr>
<th>VITAL STATS</th>
<th>GEN Z</th>
<th>MILLENNIALS</th>
<th>GEN X</th>
<th>BOOMERS</th>
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</thead>
<tbody>
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<td>Age</td>
<td>under 19</td>
<td>20 to 36</td>
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<td>Study composition</td>
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<td>Hispanic</td>
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<td>Under $50,000</td>
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<td>46%</td>
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<tr>
<td>$50,000-$99,999</td>
<td>34%</td>
<td>35%</td>
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<tr>
<td>$100,000-$149,999</td>
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<td>12%</td>
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<tr>
<td>$150,000-$199,999</td>
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<td>5%</td>
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<td>3%</td>
</tr>
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<td>$200,000 or more</td>
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<td>3%</td>
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<th>MILLENNIALS</th>
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<tr>
<td>Rural (under 2,500 people)</td>
<td>18%</td>
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<td>19%</td>
<td>↑ 22%</td>
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<tr>
<td>Suburban (2,500 - 50,000 people)</td>
<td>51%</td>
<td>↓ 43%</td>
<td>48%</td>
<td>↑ 52%</td>
</tr>
<tr>
<td>Urban (50,000 people +)</td>
<td>32%</td>
<td>↑ 42%</td>
<td>33%</td>
<td>↑ 26%</td>
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<th>MARITAL STATUS</th>
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<tr>
<td>Single</td>
<td>↑ 93%</td>
<td>↑ 57%</td>
<td>↓ 30%</td>
<td>↓ 16%</td>
</tr>
<tr>
<td>Married and living with spouse</td>
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<td>38%</td>
<td>↑ 52%</td>
<td>↑ 53%</td>
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<tr>
<td>Married but separated from spouse</td>
<td>↓ 1%</td>
<td>2%</td>
<td>↑ 4%</td>
<td>2%</td>
</tr>
<tr>
<td>Divorced</td>
<td>↓ 1%</td>
<td>↓ 2%</td>
<td>↑ 12%</td>
<td>↑ 21%</td>
</tr>
<tr>
<td>Widowed</td>
<td>↓ 1%</td>
<td>↓ &lt;1%</td>
<td>↓ 2%</td>
<td>↑ 8%</td>
</tr>
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<table>
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<tr>
<th>SEXUAL ORIENTATION</th>
<th>GEN Z</th>
<th>MILLENNIALS</th>
<th>GEN X</th>
<th>BOOMERS</th>
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<tr>
<td>Straight</td>
<td>↓ 73%</td>
<td>87%</td>
<td>↑ 90%</td>
<td>↑ 94%</td>
</tr>
<tr>
<td>Gay or Lesbian</td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Bisexual</td>
<td>↑ 13%</td>
<td>7%</td>
<td>↓ 4%</td>
<td>↓ 2%</td>
</tr>
<tr>
<td>Transgender/Transsexual</td>
<td>↑ 3%</td>
<td>1%</td>
<td>1%</td>
<td>↓ &lt;1%</td>
</tr>
<tr>
<td>Still figuring it out</td>
<td>↑ 8%</td>
<td>↓ 2%</td>
<td>↓ 1%</td>
<td>↓ &lt;1%</td>
</tr>
</tbody>
</table>

**Bold ↑↓ denotes positive/negative significance**
Key Findings
Everything is just plain easier when there’s an opportunity to distill enormous cohorts into a few choice attributes or sensibilities. When we do it by generation, it’s considered a time saver or a necessary evil; when we do it by race, religion or ethnicity, well, it’s more complicated. And we can also look at things by lifestage to see how people evolve and change as they move through the paths of their lives.

What we’ve learned in our Generation Nation deep-dive is that, while behavior and beliefs may be influenced by generations, they’re dictated by life stages. In other words, how Gen Z is today is just as Gen X would have been today had Gen Xers been born 35 years later. Yes, Boomers, don’t kid yourself. If you were born 17 years ago, you’d be the ones glued to cell phones and social media. Mix and match all you like and you’ll come to the same conclusion: generations are influenced by three primary factors—age, societal norms and technology.

**Generations are influenced by three primary factors—age, societal norms and technology.**
Let’s start with age, because it’s the most obvious:
Take Gen Z, for example. They’re not thinking about marriage, they’re not thinking about kids, they’re not thinking about retirement. Cynics (and parents) might say they’re not thinking at all. It’s typical of this pre-drinking age life stage when tweens’ and teens’ biggest concerns — schoolwork, hook-ups, acne — seem trivial to every generation but theirs. The same can be said of Boomers who, as the oldest generation (well, oldest for this study), have the greatest benefit of hindsight, and have a greater understanding about what’s truly important (read: family) and what’s not (read: buying stuff). Suffice it to say, with age comes maturity, just as with maturity comes career, with career comes family, and so on and so on. None of those things have been phased out over time (maturity never will) and with each comes a new set of responsibilities and awareness of how to deal with them.

Societal norms, too, are implicit. We’re prone to laud Millennials and, now, Gen Z for how inclusionary they are, especially compared to Boomers, the only generation in this report to experience racial segregation firsthand. But younger generations’ tolerance of other races, religions and ethnicities can be at least partly attributable to an increasingly heterogeneous population. In 1960, for example, 85% of the U.S. population was white; in 2011, 63% was; and, in 2050, it’ll be just 47%. It wasn’t a generational decision to make America more multicultural, just as it won’t be a generational decision to socialize with different races as we approach 2050 — it’ll be an imperative. Greater acceptance, too, of the LGBTQ community is a trickle down, with each generation discovering greater tolerance for differences in inverse proportion to how much faith Americans place in religion. Global and domestic challenges also greatly influence their growth and development. From burning draft cards in the 60s, to the race riots of the early 90s, from 9/11 to the 2008 economic recession, these events influence our fears and worries as much as our hope, and even our shopping habits.

And then there’s technology. This is where the change is the most dramatic. In 1960, nine out of 10 households owned, on average, one TV. Today, the average 10-year-old child stows the equivalent of a portable TV in their pocket, one that also makes calls, take pictures, plays pretty much every song ever, and essentially has the ability to immediately access all of human knowledge with a few taps. But if kid Boomers had the same unfettered access to the world the way Gen Z does today, you can bet their 401Ks they’d take it and wouldn’t look back. Remember Gen X spending hours at arcades, throwing their allowances on Galaga, Centipede and Pac-Man one quarter at a time? You can be certain they’d be playing Color Therapy, Neko Atsume and Pokémon Go on their phones instead had it been an option. Don’t blame Gen Z for their gnat-ish attention spans. Hop in the DeLorean and tell a Gen X teen that, one day, instead of spooling microfiche for hours on end, they’ll be able to type the “War of 1812” into a handheld device they own and they’ll get 32 million results instantaneously. In other words, the only things separating generations’ skillfulness with digital technology is their age of introduction, nothing more.

Thirty years from now, when you’ve purchased your 30th Generation Nation (hint, hint!), we’ll be talking about how Millennials, once big spenders, are now frugal, and don’t care that you can buy and have a custom-made living-room set delivered to them in under an hour using only the microchip implanted in grandma’s head. And Gen AA? They’ll just be hiking through the foothills of Peru’s Colca Canyon in the privacy of their augmented-reality rooms, making all the Millennial curmudgeons (who are still struggling to figure out this new technology) jealous.
GENERATION Z (1998 TO 2016)

Still in the prime of their youth, it remains to be seen how this generation will evolve over time as they mature and as society changes. However, as many came of age during the first African-American President’s tenure while amongst the most diverse group of Americans in the country’s history, they’re the most accepting of diversity and challenge deep-seeded social inequities. And because they’re the first generation born entirely post-internet, they can’t remember a time when content wasn’t immediately available, and they don’t remember life without mobile technology, YouTube or... what’s a landline?! Generation Z-ers have been glued to small screens since they were old enough to swipe and, if they’re forced to watch TV, have trouble reconciling “live” programming that you can’t fast forward. This type of unfiltered access helps accelerate their ascent into young adulthood and allows them a global perspective on hot topics that were once solely shaped by their friends and family. They are also more vulnerable to deceptive and fake news since they have not had experience reading traditional news coverage.

• They’re upbeat, brimming with ideas, brand-ambivalent and ready to shake up the system.
• They care little about political parties, and national borders, preferring to look at the world from a global, as opposed American perspective.
• This generation is all about streaming, time-shifting and Snapchat. Well, YouTube, too, but we wanted to keep alliteration alive. So smitten with YouTube [they’ve spent more time on it this year than any other generation], they’re ignoring TV shows and movies for the snack-sized videos portioned for their short attention spans.
In keeping with the multi-cultural evolution of gen pop, their friends come in all colors and sexual orientations, and many of them they've never met. And while much has been made about the ethnic diversity of this generation, it's notable that only 73% currently consider themselves straight, 13% bisexual and 8% are "still figuring it out." Other recent studies have actually placed the number of fully straight members of Gen Z as low as 48%. But for them, diversity is normal so they don't consider the concept of diversity in of itself cause célèbre like the Millennials.

There's some exuberance inherent to this life stage, but lots of cynicism too: They think the economy is getting worse, and the country is headed in the wrong direction, but they're not fazed by either. And, though they're on social media, they don't think it's bringing the world together; if anything, it's achieving the opposite.
MILLENNIALS (1981 TO 1997)

Most Millennial descriptors no young person would consider emphasizing on a job application. Derided as “The Me Me Me Generation” in *Time* magazine, they’re considered lazy, entitled, spoiled, disillusioned, insular and have no idea why he or she is calling when they could just text the information. Patience isn’t a virtue, although praise for a job well done (like earning trophies just for showing up), most certainly is.

- Even though the economy implosion hit them at their most vulnerable life stage, they’re incredibly resilient, optimistic, and are making the most of all parts of their life.
- They believe in being socially conscious, are inclusive of all lifestyles, and embrace adventure and new ideas with aplomb.
- There’s a swagger about Millennials that some might say borders on arrogance. This generation has seemingly ceaseless energy and an enthusiasm for life that’s downright contagious. In fact, they’re the highest in their belief in working hard and playing hard (80%).
- They’d rather text than talk on the phone, but so, too, would Gen Zers and Gen Xers, and where do you think they got that from?!
- And lazy? They work harder and more hours than every other generation at jobs they love, and see little separation between work and personal life.
- They do expect all that work will pay career dividends and earn them the giant paychecks they crave. Just make sure the company signing the checks has a social conscience (63% say it’s important to work for a company that gives back to the community), because they expect their employer and their peers to make the world a better place in which to live.
- While they may have bristled with their parents’ helicopter-style of childrearing, three-quarters say they enjoy spending time with mom and dad.
• And while safe spaces and trigger warnings have invaded many college campuses, Millennials are more open and accepting of differing ideas than other generations.

• Their childhoods full of self-esteem have led to adults full of self-esteem. Millennials believe more than any other cohort that their generation will impact the world for the better. And, also more than other cohort, they consider themselves really good-looking. This confidence is why they are ambitious, passionate, optimistic and so willing to help others.
GENERATION X (1965 TO 1980)

It’s appropriate that Generation X co-opted its moniker from the 1991 novel “Generation X: Tales for an Accelerated Culture,” a book that connected with the cynicism, ire and rebelliousness that became synonymous with this cohort, and famously depicted in John Hughes films and MTV music videos. They began as Cabbage Patch Kids-collecting, Atari-playing, Hacky Sack-kicking, scrunchies-wearing latchkey kids who matured into fun-loving creative types with an appetite for money, and willingness to finesse their rebellion into ground-breaking solutions.

- Whatever drove Generation X to challenge authority, make cereal an every-meal-entrée, and generally lust life seems to have evaporated somewhat with age. Gen Xers are the middle child between Boomers and Millennials, which, we know, makes sense. They’re at that mid-life time in their lives where they’re heads-down, getting things done, and realizing that life is harder than they thought.

- No longer the happy-go-lucky rebels of yesteryear, this cohort is stressed — in fact roughly 30% say they’re very or extremely so (higher than any other generation). Stressed about a wide range of things — saving for retirement, the economy, the direction of the country, fending for their families, etc.

- But, they’re not listless, either. They like to shop and are not easily enamored by expensive brand names, in fact 80% are open to buying clothing from mass merchandisers.

- And while Boomers may have labeled them slackers back in the day, Xers represent a larger percentage of the workforce than the older cohort now.

- Despite how they may have been perceived, only one in five consider themselves skeptical today.

- They envy Boomers’ worry-free repose and, also, the glass-is-half-full enthusiasm of Millennials.
BABY BOOMERS (1946 TO 1964)

Baby Boomers were the first generation to earn a name and became the largest in American history. Defined as outspoken rebels willing to shake things up, speak out, and burn their bras for their beliefs, they were the first generation to push back against the power of the American war machine while protesting for peace and civil rights. But not everyone was a Woodstock-going hippie back then. There was a “Silent Majority” who helped elect Richard Nixon. Plenty of Boomers took a straighter path, while holding onto some fairly “traditional” beliefs about equality, race, religion, and the future. Even today, Boomers are still (if not more) complex and nuanced — often shaped by how they’ve adapted (more or less) as they settle into their golden years.

- While they’re no doubt feeling their age, they still want to make the most of it — paying attention to their health and well-being so they can enjoy their longer lives.
- They realize that culture has become increasingly impersonal, but will do anything to stay connected with their kids (even if they prefer getting a phone call once in a while).
- They’re disciplined and hard-working yet also feel the pressures of age discrimination and don’t sweat much about catching up on work from home.
- They may not have enjoyed much fun and laughter with their parents, but they’re truly enjoying experiencing life with their grown kids (and grandkids!).
- While 42% are retired, others aren’t quite ready to hang up their hat — either because their finances aren’t where they need to be or they’re exploring other opportunities or passions. Bottom line is that they’re not sitting idle — except when they’re trying out a new restaurant.

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• Even though they are the most ethnically homogenous generation, they do split more than the other generations when it comes to some of their core values, such as their views on diversity, inclusion, and climate change.

• They prefer watching TV where it belongs — on a TV — but aren’t opposed to more newfangled sources like YouTube and Netflix.