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Understanding how Gen Z
will Shape, Influence, and
Impact **The Future of Retail**

Three Studies Woven into one story

Leger Youth Study

Annual study conducted among [3015 Millennials and Gen Z Canadians](#).

Leger DGTL Study

Online survey of [4,079 respondents](#).

Gen Alpha RCC Exclusive

An online survey of [200 Generation Alpha respondents](#). That examines their social media and online habits.

Key Discussion Points:

- Today's youth are facing both financial and personal pressures – providing context around their retail behaviour
- The online arena is becoming more combative with youth more likely to be vocal on social media
- Generation Alpha has the potential to re-shape the retail space

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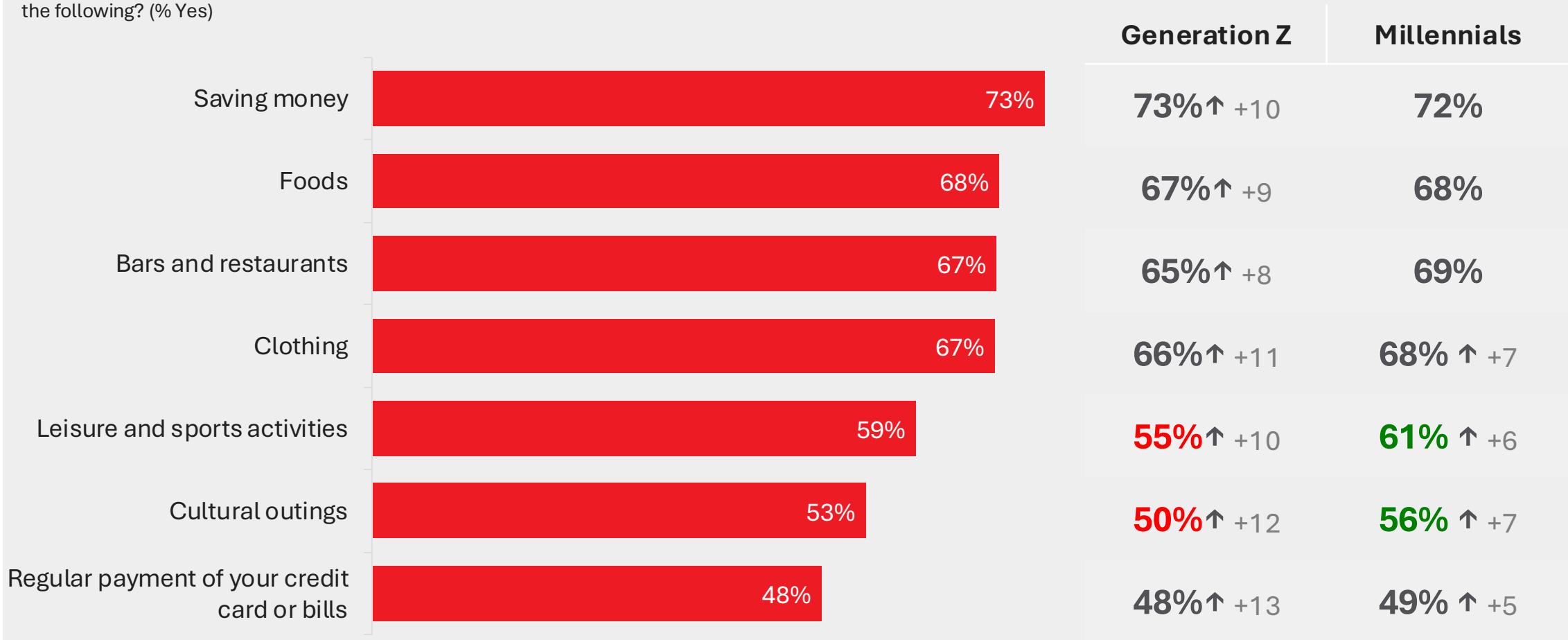
Today's Youth



Finances

In almost all cases, a majority have made a change in their spending habits

Q. Has the increase in the cost of living made you change your habits with respect to the following? (% Yes)



Shopping behaviours

Younger Canadians are making changes to their purchasing decisions

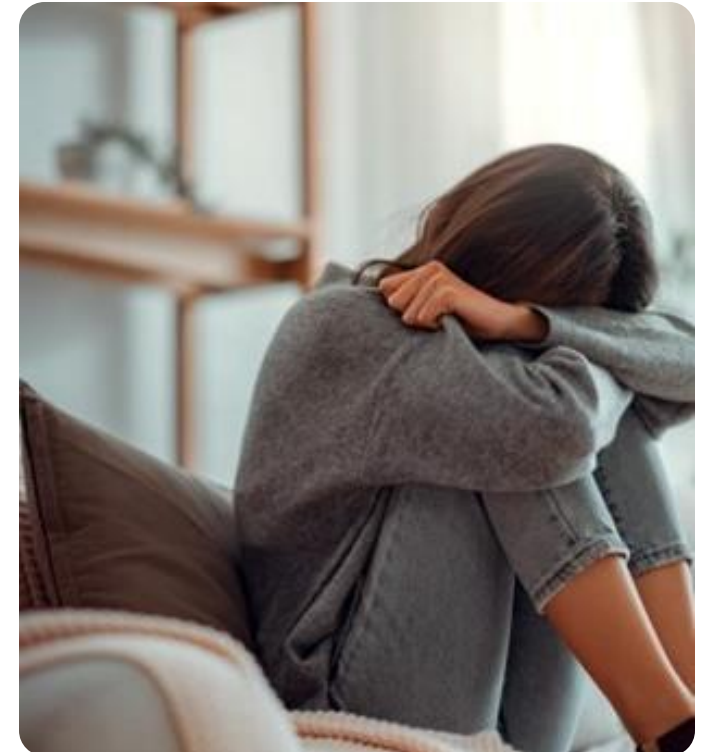
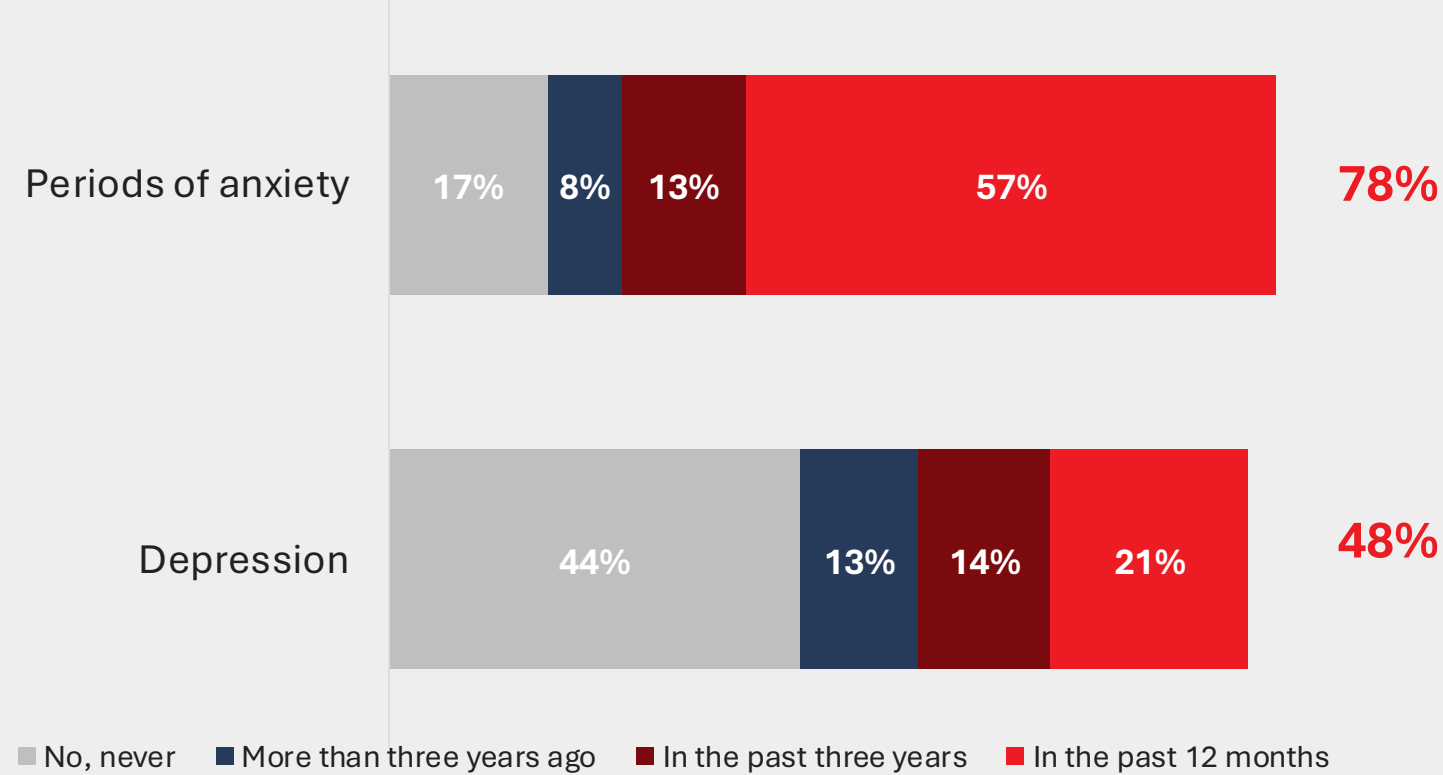
Q. Which of the following have you personally done in the last 6 months in order to keep your grocery bills more manageable?



Mental Health

Nearly one-in-two young Canadians report having experienced depression or major depression in their lives.

Q. Have you ever experienced major depression, moments of depression or periods of anxiety? If so, how long ago?



Effects on mental health

Compared to older generations, Millennials and Gen Z respondents are more likely to report mental health impacts

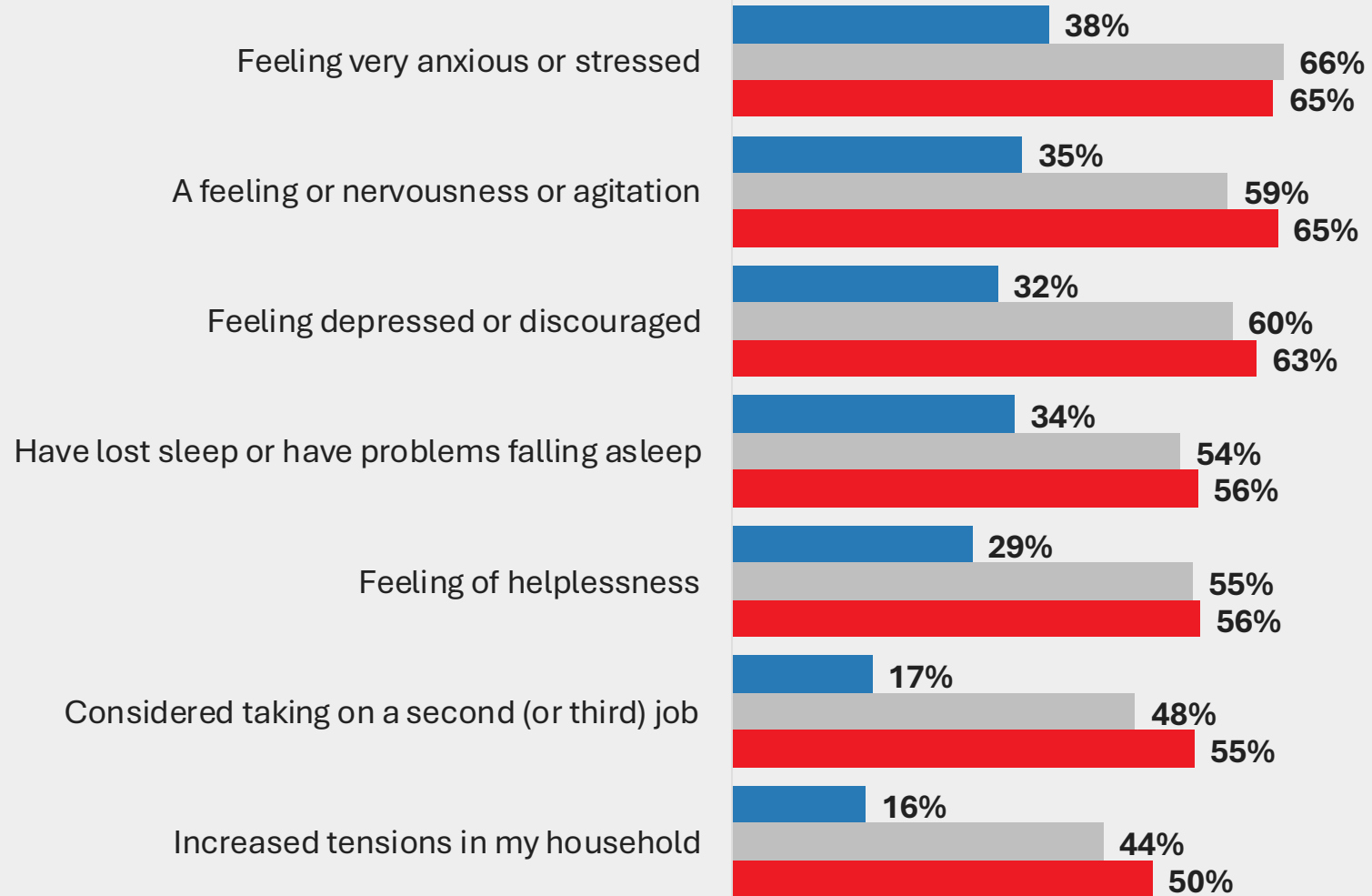
Boomers



GenX



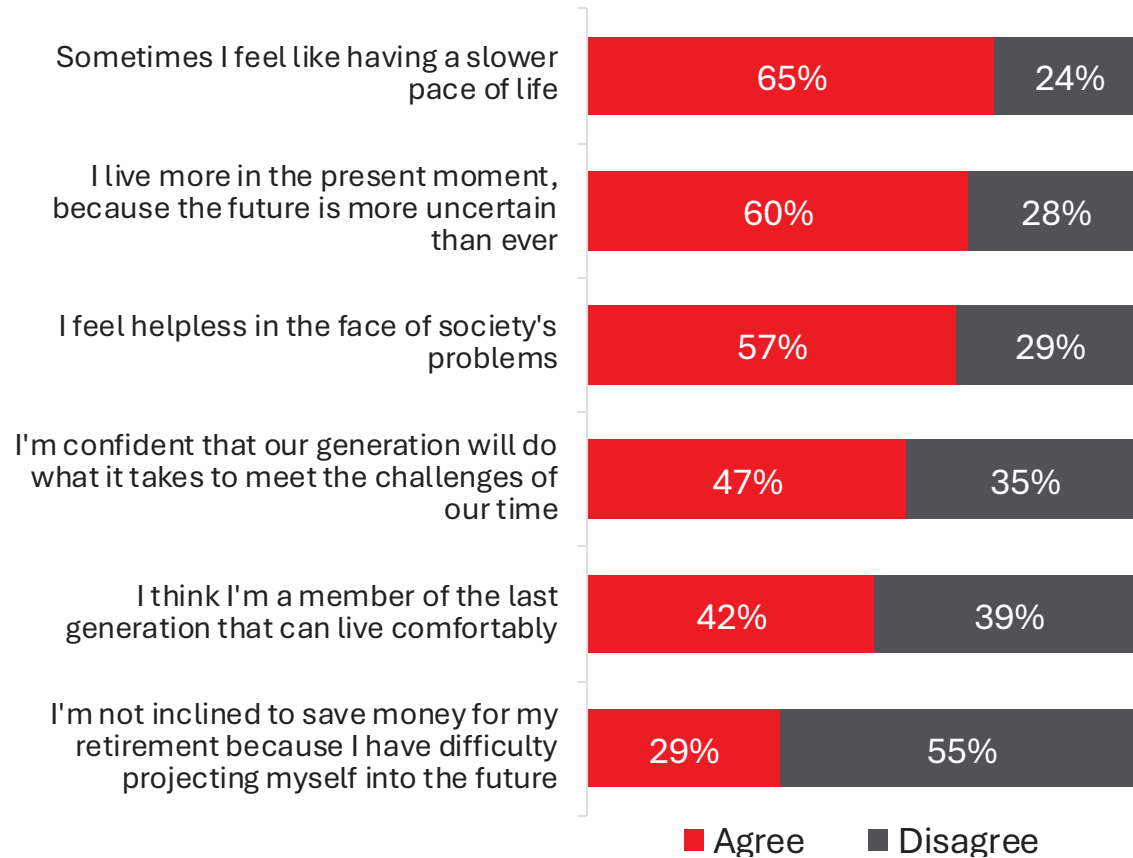
Millennials and Gen Z



The Future is More than Uncertain

Youth are finding it harder to picture a future for themselves

Q. To what extent do you agree or disagree with the following statements?

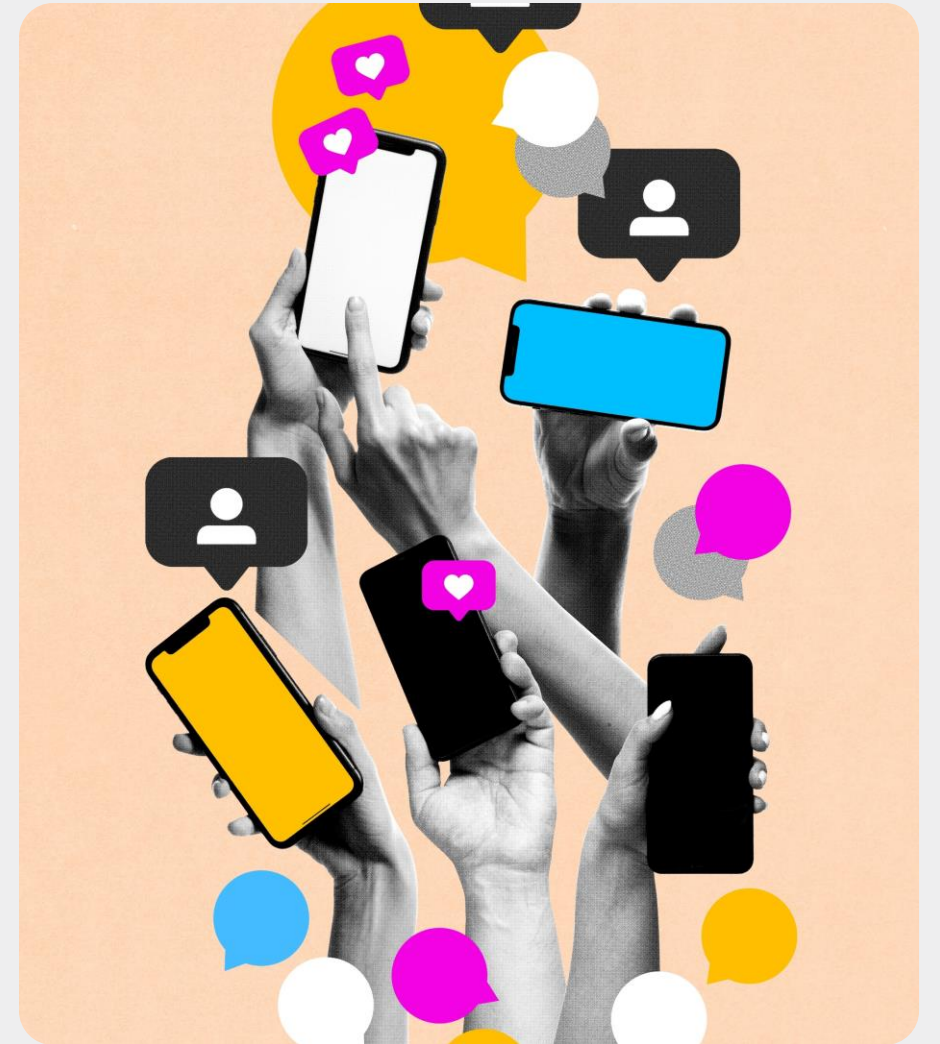


27-TO-39-YEAR-OLDS
ARE THE MOST WORRIED



2

The Online Arena



Younger generations
are transforming the
digital landscape.

It's not just fashion that changes from one generation to the next; online behaviours evolve as well.

Keeping an eye on and drawing inspiration from what younger people are doing is an excellent strategy: one day, these young people will become your target audience and bring with them all their digital knowledge and habits!

Corporate messaging

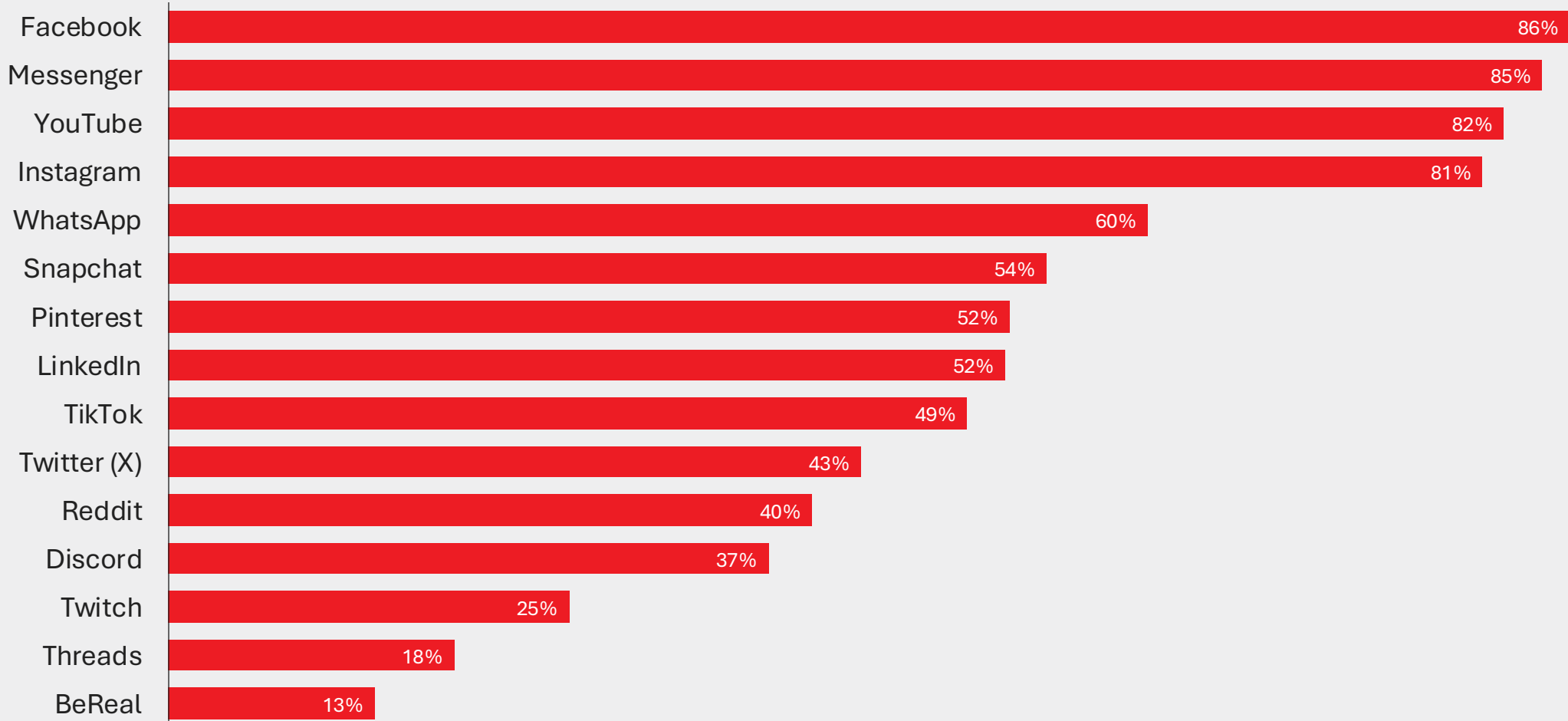
Cereal for dinner...



Social Media Platforms that Dominate

Facebook maintains a significant hold, particularly concentrated among older millennials

Q. Do you have an account on the following social media or messaging apps?



Source: Leger DGTL Study 2023

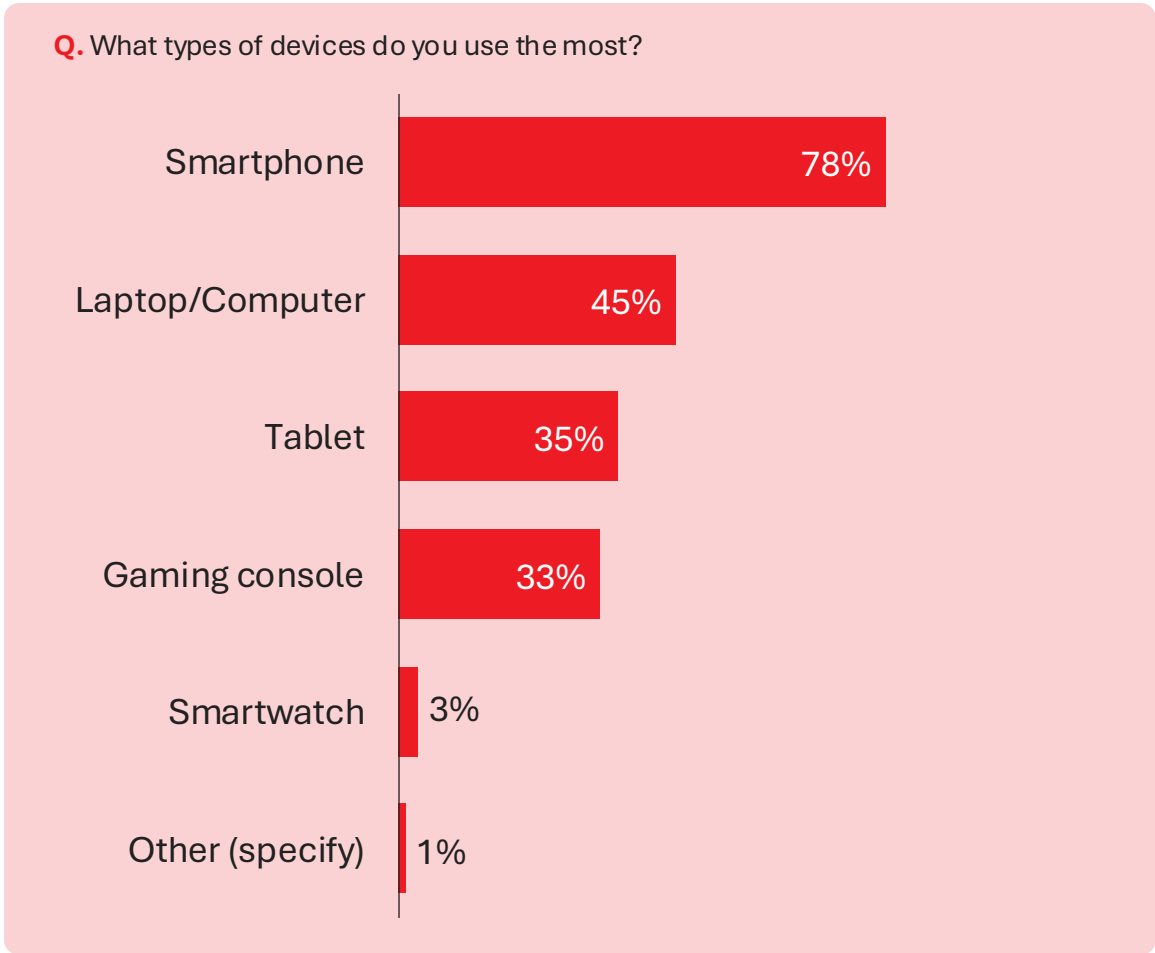
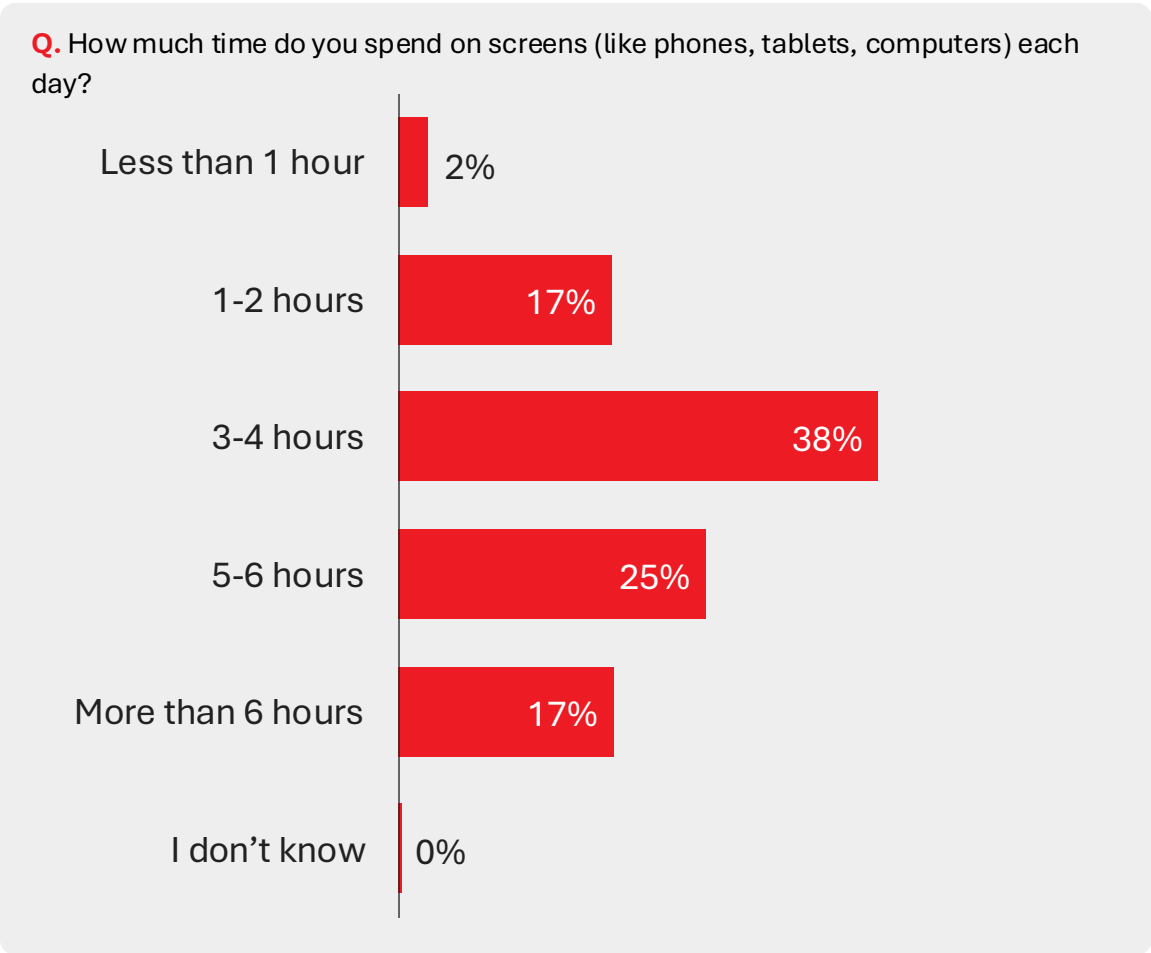
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Generation Alpha New Insights



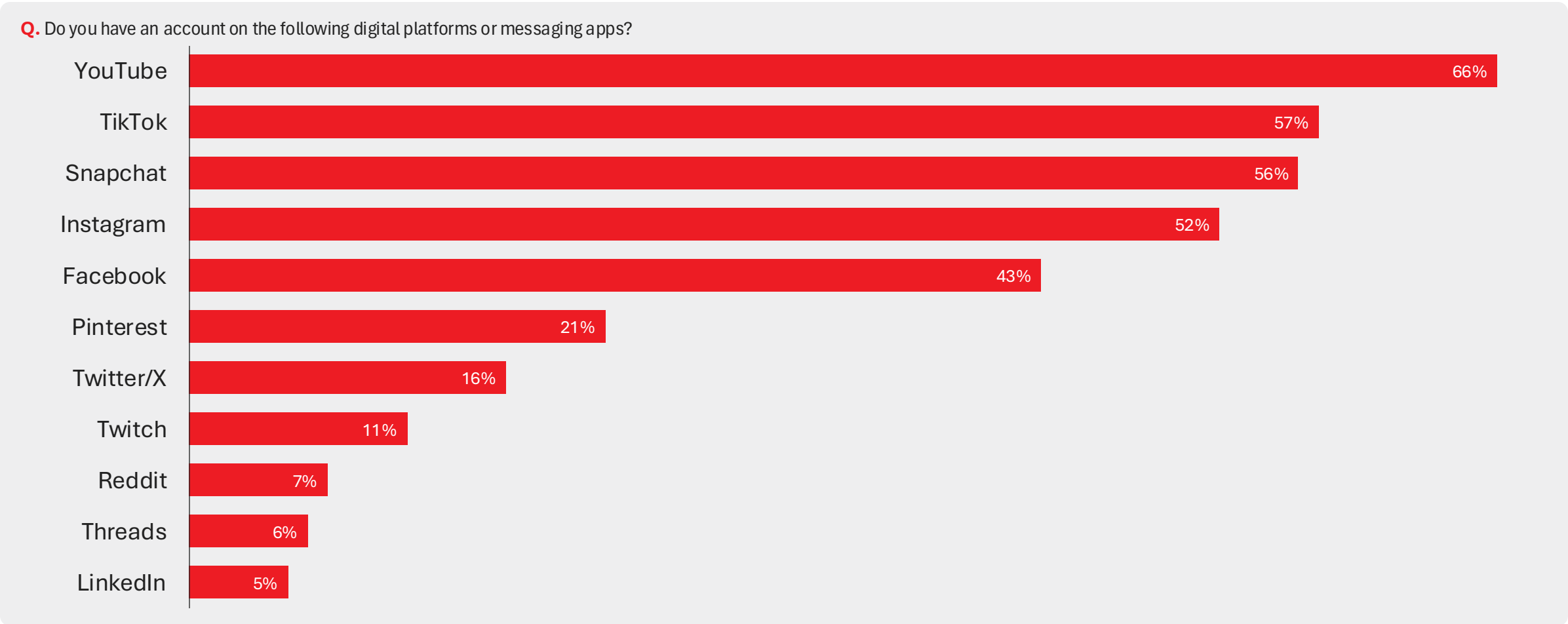
When and How

Across 12–14-year-olds, smartphones dominate usage with most being on screen between 3 and 4 hours



Where are they online?

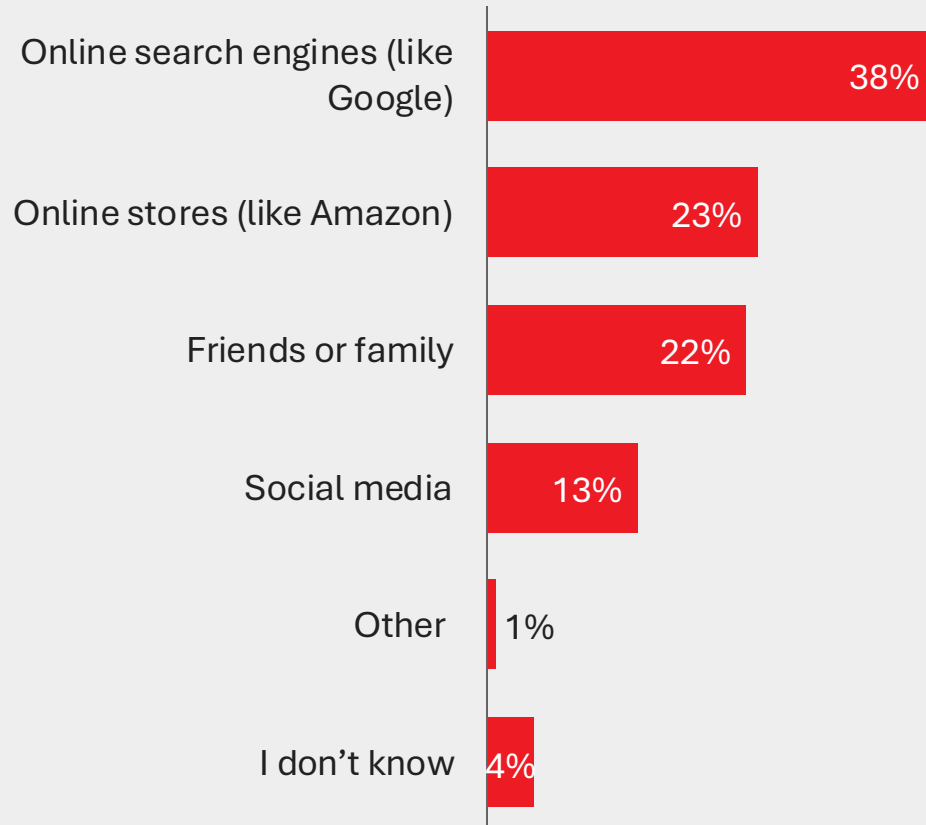
Youtube, TikTok, and Snapchat rank at the top in terms of social media adoption



Information Sources

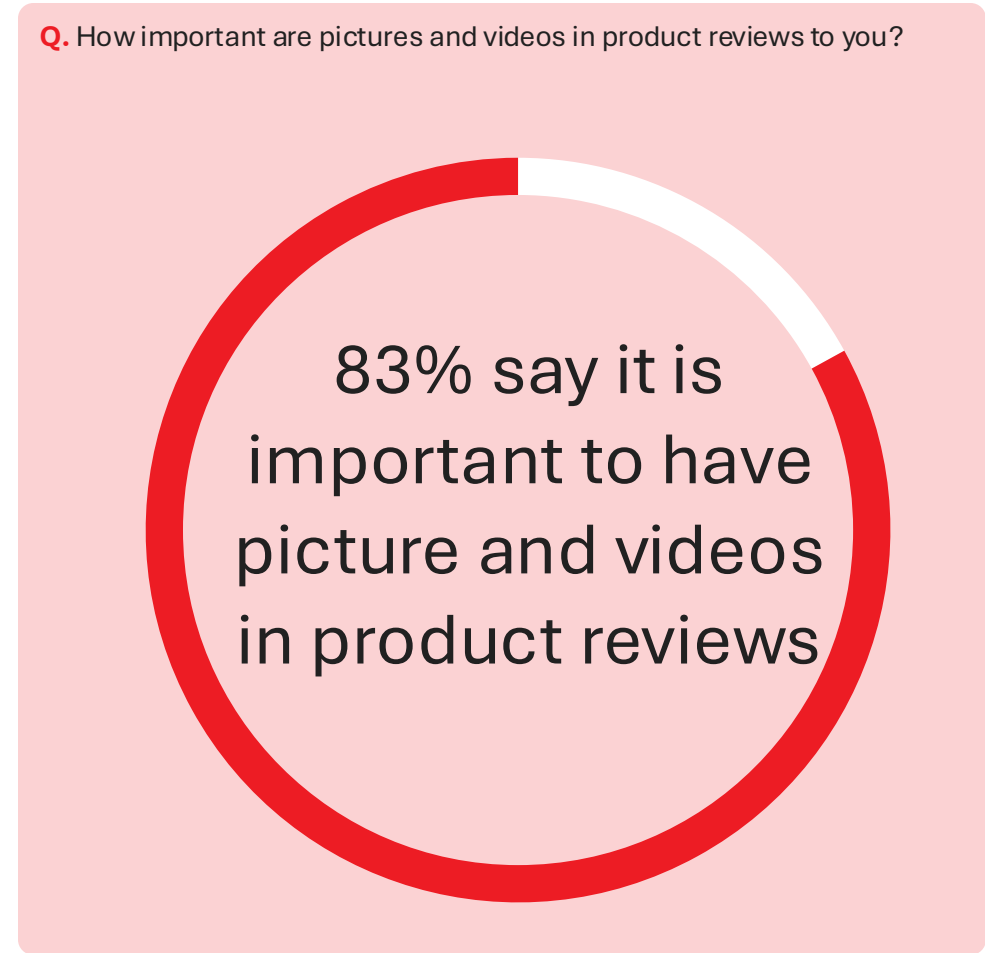
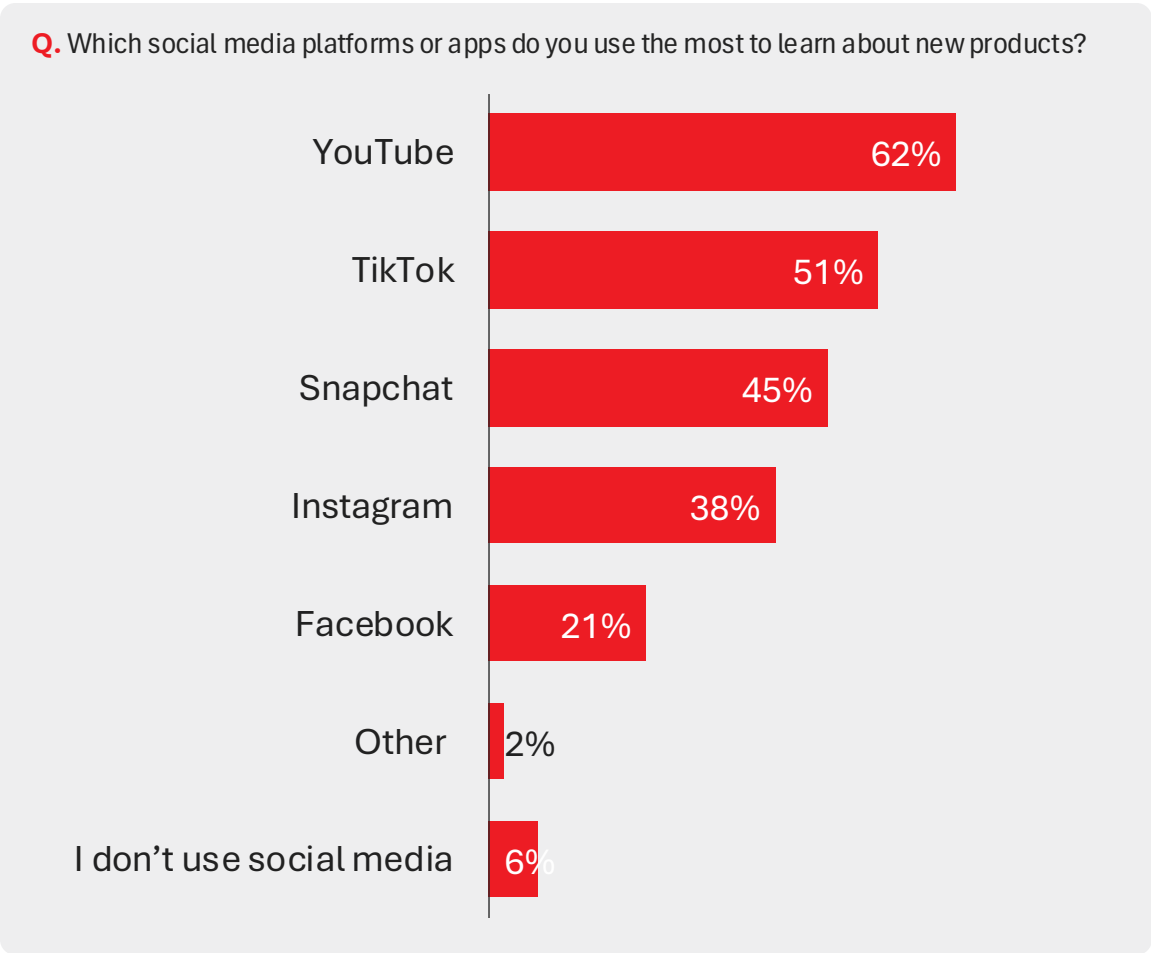
Search engines are the embarkation point of Generation Alpha’s purchase journey

Q. When you want to buy something, where do you usually look for information first?



Video based apps are the most consulted platforms when learning about new products

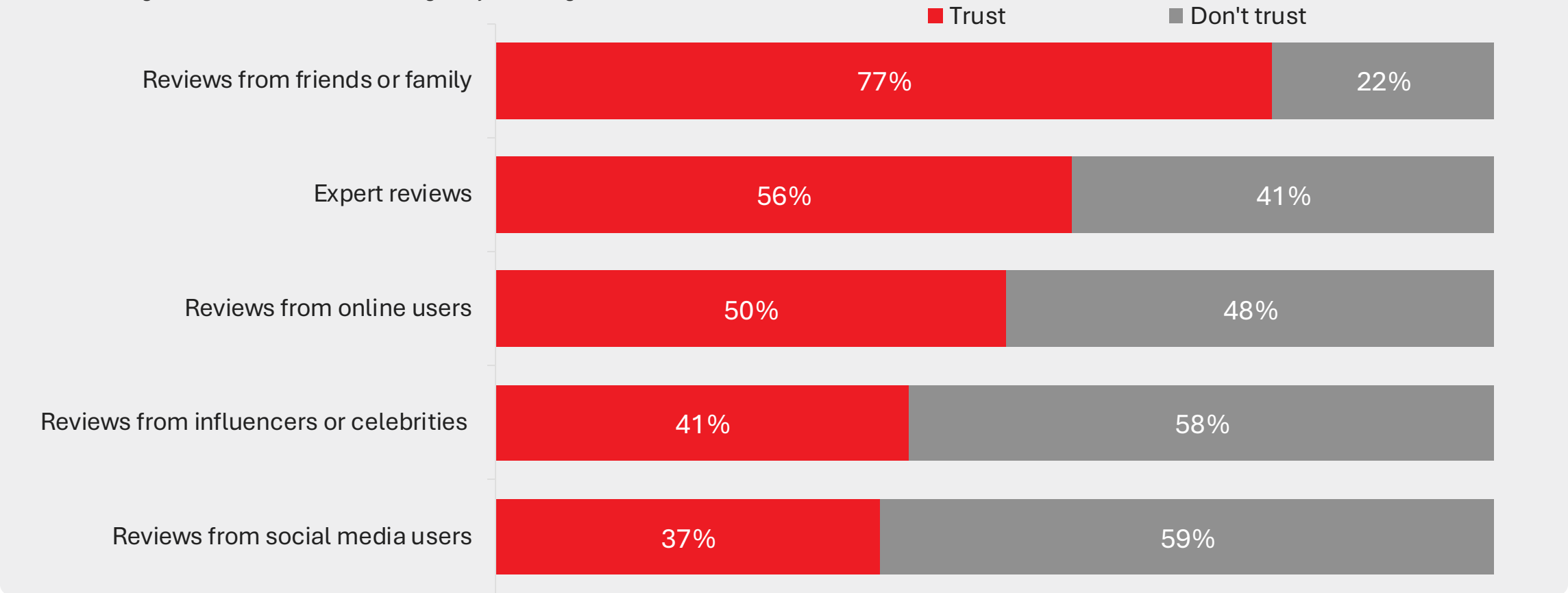
Picture and video are seen as important must haves in product reviews



Proof Points of Trust

Friends and Family are still top in terms of trust for information, highlighting their important influence

Q. On a scale from 1 to 5 where 5 is trust a lot and 1 is do not trust at all, to what extent do you trust the following information sources when deciding to buy something?

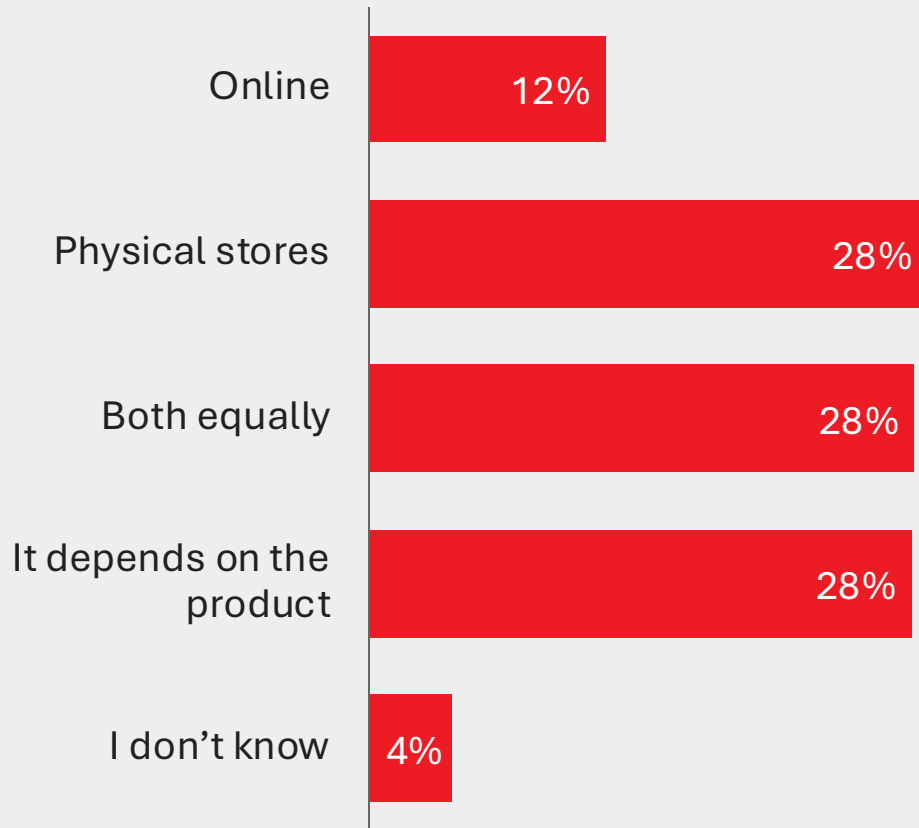


Source: Gen Alpha RCC Exclusive 2024

Not all eggs in one basket

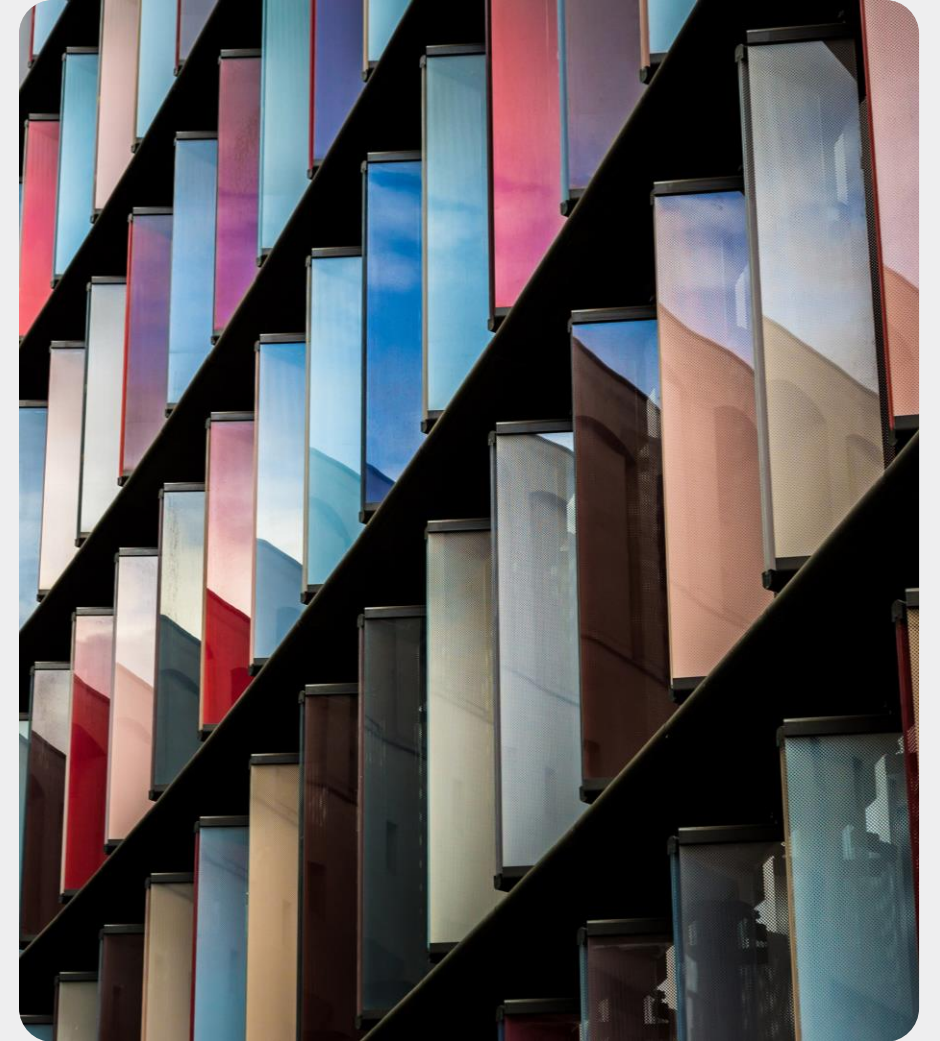
Interestingly, brick and mortar still holds a strong standing among generation alpha

Q. Do you prefer to buy things online or in physical stores?



4

Key Takeaways



How can I reach the **right audience** with my marketing strategy?

Three key takeaways you can implement today

1. Position Yourself Strategically

2. Anticipate the Post-Facebook Era

3. In-store experience not dead

SPECIALIZED STUDIES

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CRACKING THE NEWCOMER CODE (NEW DATA AVAILABLE OCTOBER 25th)



Method

Canadian online survey via Leger's LEO panel (n= 2,104/ 18 years or older and arrived in Canada in past 10 years)

When

December 14th, 2023, to February 16th, 2024

Margin of error

For comparison purposes,
a probability sample of this size yields
a margin of error no greater than $\pm 2.1\%$,
(19 times out of 20)

Weighting

Results were weighted by **age, gender, region, country of birth, as well as years since arrival.**

It was weighted to the 2021 Census profile of immigrants in the past 10 years to ensure a representative sample of the new Canadians.

The first iteration of our “Cracking the Newcomer Code” released in March with two webinars.

Public affairs webinar:

https://www.youtube.com/watch?v=jbM_xD3lmiU

Financial webinar:

<https://www.youtube.com/watch?v=Kb7COGjaKak>

The cost to purchase the study is \$5900+HST.

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