



ATKINS
Member of the SNC-Lavalin Group

GEN Z: EMERGING TALENT

A BRIEF INSIGHT INTO HOW WE WILL LIVE AND WORK IN THE FUTURE

AUGUST 2018

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INTRODUCTION

Imagine the world a decade from now. Where do you live? Where do you work? What does your workplace look like? How is it different from today? How do you travel? Are you actively involved in some form of sharing economy?

These questions may be difficult to answer given the unprecedented rate of technological and social change we are experiencing, but they are worth considering. Why? Because the people who work for SNC-Lavalin today are focused on finding solutions to the challenges of tomorrow.

As a company, we are building what matters. We are involved in the financing, design, construction, operation and maintenance of major infrastructure assets around the world and our people are using their expertise to help our clients create a sustainable future for us all. To do this, we need to ensure we have a talented and diverse team.

To help us attract the best people, we are looking closely at what future job seekers expect in an employer. We gathered research from across the globe and asked more than 8,000 Millennials (people born early 1980s to the late 1990s) and representatives of Generation Z (people born after the late 1990s) to tell us what they think about work, technology and the world around them. We also tapped into the expertise within our own organisation and networks as we aimed to identify some of the issues and trends that will shape people's lives in the years to come.

LIVING

We found many of our youngest respondents are drawn to urban areas. They still aspire to own their own home, despite the challenging economic environment they have grown up in. They are yet to embrace the idea of co-living, that is, sharing a space with others for long periods of time, although it could save them money.

WORKING AND LEARNING

Many representatives of Generation Z want to work for a company that will give them a chance to prosper in line with their values and beliefs. They are keen to seize opportunities for personal growth as well as be involved in challenging work of which they can be proud. Our research suggests they have a global outlook and a commitment to ongoing education, whether it is through formal channels or learning new skills via video channels such as YouTube.

CONNECTIVITY

Members of Generation Z are digital natives. They are hyper-connected and create, as well as consume, content online. But despite being tech-savvy they also want to collaborate, in person, with colleagues and partners instead of relying on digital systems to do that for them.

VALUES AND BEHAVIOURS

The newest members of the workforce are driven, passionate, open-minded and optimistic about the future. They care about their environment and believe more needs to be done to protect it. Generation Z has the potential to make a difference to the way we live and work through an 'always on' approach.

Technology has already changed the way we work, learn, shop, relax and move around our urban environments. We expect even more dramatic digital transformation to provide the backdrop for the generations working in our organisations today.

The insight from this research is helping us to devise appropriate attraction and recruitment strategies, develop rewarding work-related choices and provide an engaging and fulfilling experience for our employees. As a representative of the wider engineering and construction industry, we want to promote the extraordinary opportunities available to you when you consider a career in our sector. We are also hoping to demystify design and engineering as a discipline and think of new ways to encourage students to choose science, technology, engineering and maths (STEM) subjects.

As we look ahead, our ongoing research and insight will continue to evolve in line with the fast-moving world in which we live. We look forward to welcoming a new generation of innovators to our company and watching them shape the future.

August 2018

THE GENERATIONS



Generation Z (Gen Z)

- Born after the late 1990s
- The first true digital natives
- A 'do-it-yourself' generation
- Attracted to employers with a strong social purpose
- They want to make a difference to their world



Millennials (Generation Y)

- Born between the early 1980s and the late 1990s
- Eager adopters of new technology
- They have different priorities to other generations and value access over ownership
- Portrayed as job hoppers who expect swift career progression
- Tolerant, honest and want a 'fun' place to work with their colleagues



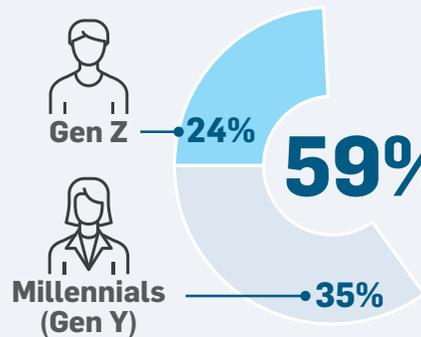
Generation X (Gen X)

- Born between the mid 1960s and the early 1980s
- Some say they're a work hard, play hard generation
- Seen as being career focused and independent
- They often have an entrepreneurial spirit
- They embrace technology



Baby Boomers

- Born between the mid 1940s and the mid 1960s
- A post-war generation
- Challenged the status-quo in the 1960s and 1970s
- Reported to be ambitious and hard-working
- They remain active inside and outside the workplace much later in life than previous generations



59% OF THE WORKFORCE WILL BE MADE UP OF MILLENNIALS AND GEN Z IN 2020.

Between them, Gen Z and Millennials will soon account for more of the population than Baby Boomers.

Source: Park Communications Ltd – Millennials to Rule the Workforce by 2020



CITY LIVING
APPEALS TO
**MORE
THAN HALF**
OF GEN Z SURVEY
RESPONDENTS

LIVING:
THE HUSTLE AND
BUSTLE OF URBAN
LIVING OR OPTING
FOR A QUIETER LIFE?

Source: Nielsen Global Generational Lifestyles Survey, November 2017 – 52% of Gen Z want to live in a big city or urban area

Historically, major capitals and industrial centres have been magnets for talent, innovation and investment, and people have travelled thousands of miles to access the opportunities presented there. But in a more connected world, do cities hold the same appeal?

A global survey of more than 30,000 online respondents across 60 countries found that more than half of Gen Z and Millennials (52% and 54% respectively) still want to live in a big city or an urban neighbourhood, and just over a quarter believe the suburbs are the best place to call home.¹

So what continues to make these urban areas attractive? Our recent research revealed that young people in the USA are drawn to cities that feel safe and have low levels of crime. The cleanliness of the streets is their second most important consideration when they're making a move.

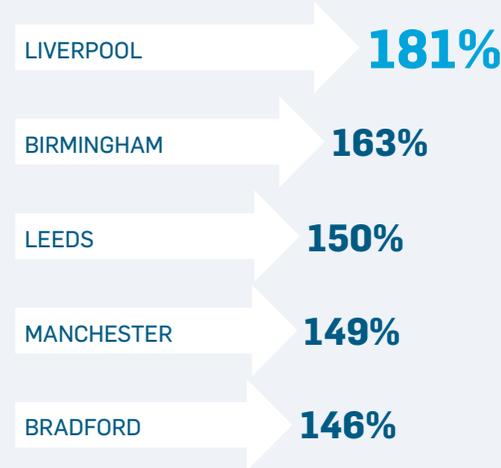
Canadian respondents agreed on the importance of safety, but they also placed significant value on a city's public transport network. Canadian cities have been growing rapidly and fortunately, authorities have boosted investment in transit schemes that aim to cut commute times, reduce air pollution, and strengthen communities as well as Canada's economy.

Gen Z and Millennials in the UK also want access to public transport and ranked that equally as highly as a city's approach to crime prevention in their responses to our survey. A wide range of job opportunities, closely followed by having access to green space, were listed as the most important contributors to a good quality of city life.

WILLINGNESS TO COMMUTE

In the USA and Canada, the younger generations are willing to travel to get to their workplace but most want to keep their commute under 45 minutes. Around one-third of respondents (34%) to a survey of almost eight hundred 18 to 25 year-old college and university students said they're willing to travel up to half an hour, and another third would be willing to add 15 minutes to that journey time. Their preferred mode of transportation is driving (65%), followed by car-pooling with co-workers (30%).² So how realistic are their expectations?

The UK's fastest growing city centre populations between 2002 and 2015:



Source: BBC News – The UK's rapid return to city centre living (June 2018); according to analysis of figures from the Office for National Statistics

In the USA, the average journey is around 26 minutes each way, but getting to or from work takes approximately a fifth of workers 45 minutes or longer. New Yorkers, on average, spend 34 minutes commuting (one-way) and one-third of people spend over 60 minutes travelling in each direction.³

Commuters in Canada spend an average of 24 minutes driving to their workplace and 45 minutes if they're using public transport.⁴ While in the UK, people are now spending 81 minutes travelling in and out of London for work, which is 23 minutes longer than the national average of 58 minutes.⁵ That's the longest journey time in the UK, but within the limit acceptable to more than a third of Gen Z respondents to a recent survey, who said they would be willing to travel up to an hour each way to get to the perfect workplace.⁶

¹ Nielsen Global Generational Lifestyles Survey, November 2015

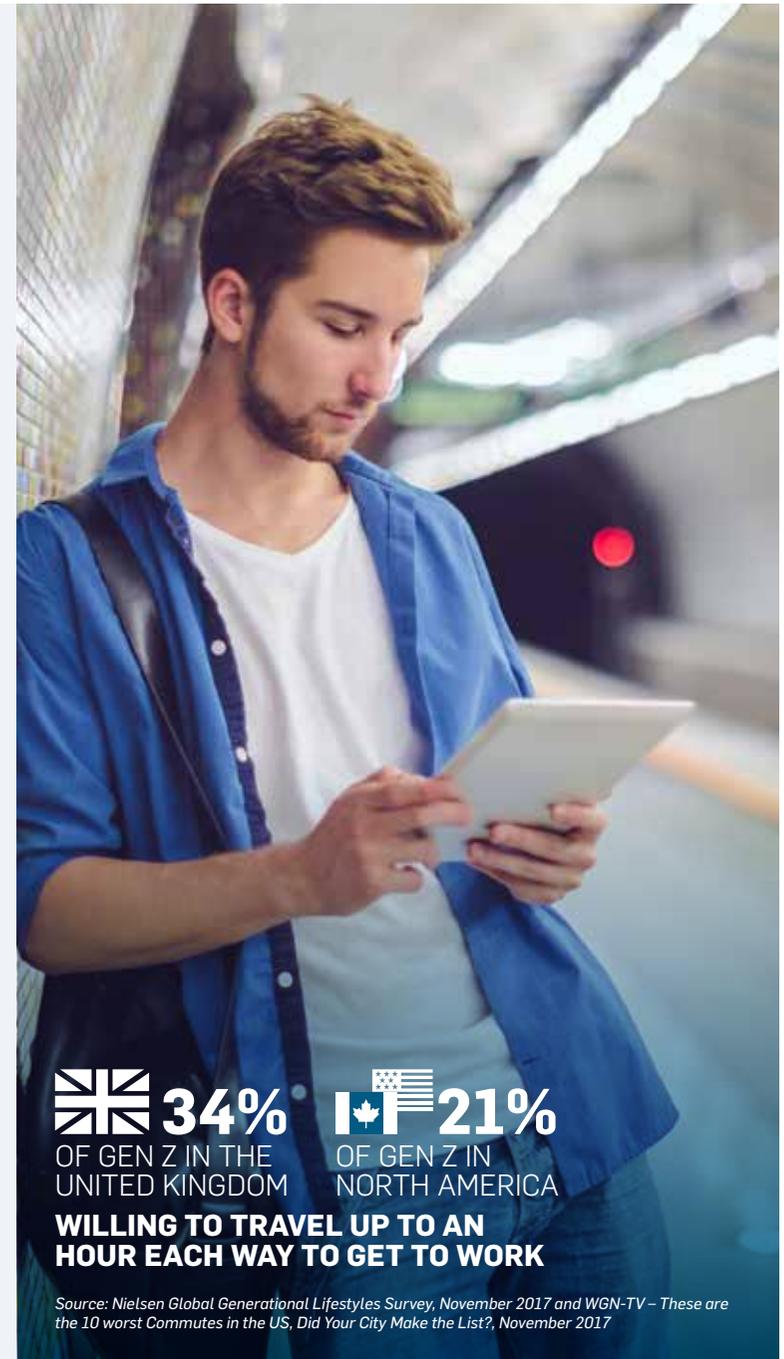
² Rober Half Get Ready for Generation Z Report, 2015

³ United States Census – Commuting (Journey to Work), January 2018

⁴ Statistics Canada – Journey to Work: Key Results from the 2016 Census, November 2017

⁵ City A.M. – Ranked: The UK Regions with the Longest and Shortest Daily Commutes, November 2017

⁶ www.allwork.space.com – With 5 Generations at Work Together, Flexible Workspaces Could be a Blessing to Companies, March 2018



 **34%** OF GEN Z IN THE UNITED KINGDOM
 **21%** OF GEN Z IN NORTH AMERICA
WILLING TO TRAVEL UP TO AN HOUR EACH WAY TO GET TO WORK

Source: Nielsen Global Generational Lifestyles Survey, November 2017 and WGN-TV – These are the 10 worst Commutes in the US, Did Your City Make the List?, November 2017



NEARLY ALL

OF GEN Z SAY THEY
PLAN TO OWN
THEIR OWN HOME

LIVING: RENTING VERSUS HOME OWNERSHIP



FOR 4 OUT OF 5
OF GEN Z HOME OWNERSHIP
IS AN **ULTIMATE LIFE GOAL**



Source: Better Homes and Garden Real Estate, November 2016

In recent years, it has become increasingly difficult for young people to take their first steps on the property ladder. Challenging economic conditions have forced many to stay at home with their parents or rent for longer. And yet, our research showed the struggle hasn't put them off – they do still aspire to own their own home.

In fact, our findings suggested the majority of British, Canadian and American Gen Z respondents intend to buy their own property between the ages of 26 and 35. This is particularly the case in the 26 to 30 year-old age bracket.

It also extends to a country that has one of the lowest home ownership rates in the developed world. 76% of Germany's Millennials and Gen Z respondents said they are planning to buy at some point. (In Germany, tenants stay in their rental accommodation for an average of 11 years, compared with just 2.5 years in the UK.)¹

However, it won't be easy for young people to achieve their goal. A recent report from a leading think tank suggested up to one in three Millennials in Britain may never own their own home.^{2,3} In Canada⁴, at the age of 30, people are half as likely to be homeowners, compared with Baby Boomers at the same age. In the USA, new data show a slight increase in home ownership rates for under 35s. (36% in 2018 compared with 35% a year earlier.)⁵

GENERATION RENT

In the years since the global financial crisis, increasing house prices, especially in big cities, tougher mortgage requirements and low wage growth have made it hard for young people to buy their first home. In the UK and USA, more people are renting now than at any other time in the past five decades.⁶ In Canada, 76% of survey respondents who said they plan to buy in the next five years haven't yet started to save or have managed to set aside less than a quarter of the money they need.⁷

But is renting all that bad? A recent survey of flatmates in London and New York (NYC) looked at just how much of peoples' pay is being spent on accommodation.⁸ In London, the average monthly cost of renting a room is around £748 – or £1,608 for a one-bedroom flat. In NYC

it's even more. The average room cost is £973 a month – or £2,166 to have a one-bedroom flat to yourself. In the USA, utility bills and food were also more expensive. But salaries were higher – just over £55,000 a year in the Big Apple compared with around £35,000 in London.

So with cheaper accommodation and a lower cost of living, can young Londoners still save for that all-important deposit? Not always. Fortunately, some parents are stepping in to help. In the mid-1990s, around one in ten first-time home buyers in the UK were getting help from their parents. By 2005, the figure had increased to 25%, and it has risen to as much as 75% since the economic downturn.⁹

	LONDON	NEW YORK
 AVERAGE SALARY	£34,388	£55,939
 SPENDING OVER £200 A MONTH ON BILLS	17%	49%
 MONTHLY RENT (AS A % OF SALARY)	26% FOR A ROOM OR 56% FOR A FLAT	21% FOR A ROOM OR 46% FOR A FLAT

Source: SpareRoom.com, April 2017

¹ The Progressive Policy Think Tank – Lessons from Germany: Tenant Power in the Rental Market, January 2017
^{2,9} Resolution Foundation – Home Improvements: Action to Address the Housing Challenges Faced by Young People, April 2018
³ Resolution Foundation – The Real Barrier to Millennials Owning a Home is Not the Mortgage – It's the Deposit, May 2018
⁴ Huffpost – Hey Canadian Millennials: Here's Proof you missed out on Buying a House, January 2018
⁵ Bloomberg.com – Millennials Are Out of the Basement and Into Buying Homes, February 2018
⁶ Financial Times – Generation Rent and the end of 'forever furniture', April 2018
⁷ Cision – Canadian millennials dream of being homeowners but most aren't planning for it, CIBC Poll April 2018
⁸ SpareRoom.co.uk – London vs New York: Which is the Best City to Rent In?, April 2017



TWO-THIRDS

OF PEOPLE ARE WILLING
TO SHARE THEIR ASSETS
FOR A FINANCIAL
REWARD

LIVING:
THE SHARING ECONOMY –
ARE WE IN OR OUT?

Outside the home, how important is ownership to Gen Z and Millennials? Our research shows both generations are positive about the sharing economy.

We asked people to tell us what they think about sharing everything from clothes to cars, tools, and even their pets. The highest level of engagement was with renting a room in someone else's house and with car sharing. Millennials are marginally less likely to consider house-sharing in the future, but both age groups would be open to it. We found that Millennials are more likely to rent their parking spaces than Gen Z, which may be because they're more likely to own property giving them that option.

Global research from a data analytics company also showed there is support for the concept of sharing across all generations. 68% of respondents to a survey said they're willing to share their assets for financial gain and almost as many (66%) said they're likely to use or rent products or services from others. Of the people who are willing to borrow from others, 35% are Millennials but just 7% are from Gen Z.¹

WHERE DO YOU DRAW THE LINE?

It's one thing to rent a room or share a flat while you're looking for your own place to buy, but could living with other people on a long-term basis be a viable solution to the current housing crisis for some people?

What do people want from co-living in the future?



Co-living, which is a number of strangers sharing the amenities of a large property, is being promoted as a more flexible, social and sustainable way to live, especially in major cities. Its advocates believe people will favour the convenience of it over home ownership.²

The concept is already winning support but could it really change the way homes of the future are designed?

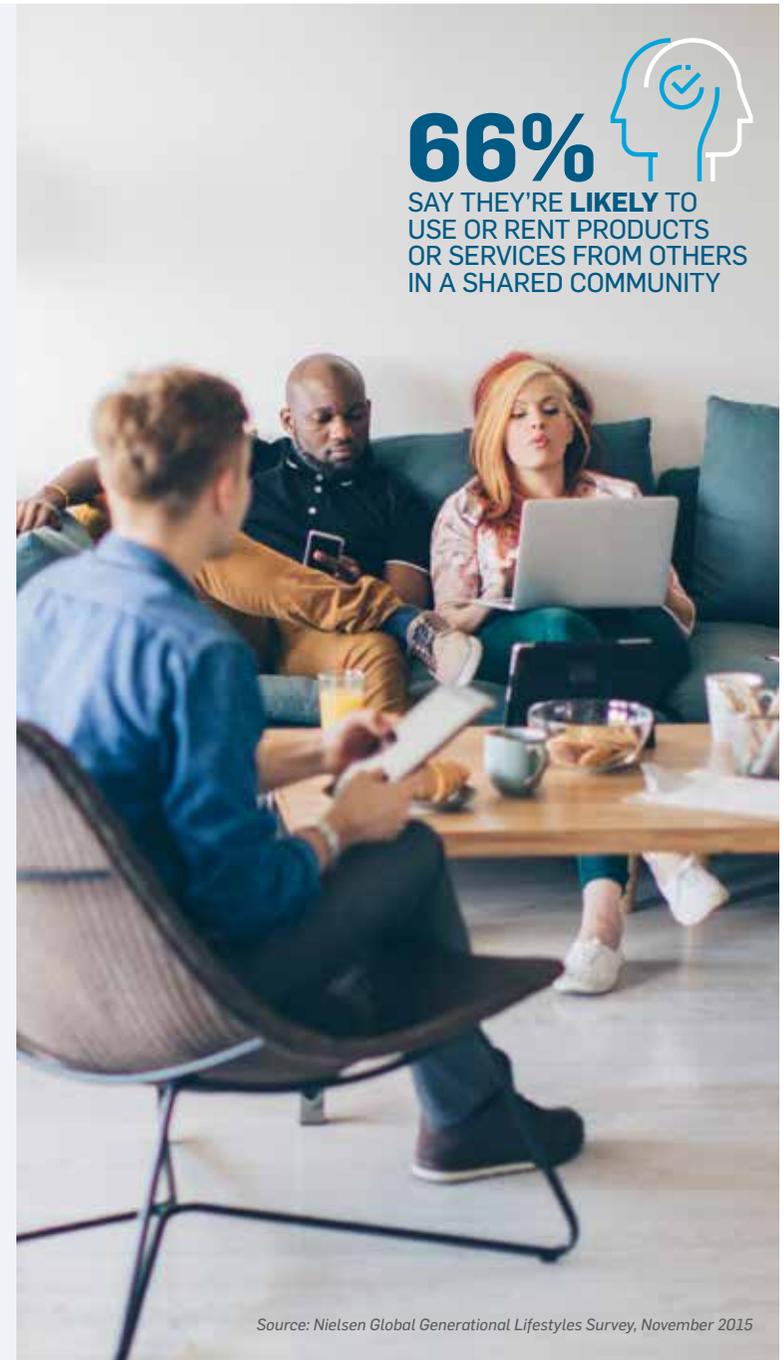
A recent study, covering more than 7,000 people in almost 150 countries, found most respondents would prefer to live in a city and half would want to be part of a smaller community, say, from four to 10 people.³

However, most people do have concerns about privacy and say they would want to have a space to themselves. Cleanliness and honesty are the most sought-after qualities in a house-mate. In this survey the age group most in favour of co-living was 40 to 59 year-olds. 25 to 30 year-olds were the least interested.⁴

¹ Nielsen Global Survey – Not Just for the Young: A Look at Share Communities by Generation, February 2014
² Fast Company Co Design – What Today's Co-Living Spaces Get Wrong, February 2018
³, ⁴ Space 10 – One Shared House 2030: A Collaborative Survey, February 2018



Source: Anton & Irene & Space10 – One Shared House 2030 Survey, February 2018



66% SAY THEY'RE **LIKELY TO USE OR RENT PRODUCTS OR SERVICES FROM OTHERS IN A SHARED COMMUNITY**

Source: Nielsen Global Generational Lifestyles Survey, November 2015

**NEARLY
HALF**
OF GEN Z SAY
EARNING A GOOD SALARY
IS IMPORTANT



**WORKING AND LEARNING:
CAREER ASPIRATIONS**

At SNC-Lavalin, we're helping to design and build the infrastructure needed to improve people's lives. But why has our team chosen to make a difference in this way?

Some colleagues set out on a carefully planned career path because they want to fulfil a specific ambition. Others have discovered what really interests them by embracing the variety and diversity of the challenges they face. We're all driven by different things. So what does that mean for employers? In this rapidly changing world of work, how can organisations attract and retain the best people?

We gained insight into this question by asking Gen Z and Millennials what they're looking for from a career. We found that in the USA, Canada and the UK many are seeking job opportunities that will enable them to have a good quality of life. Other organisations have looked even more closely at what the newest generations to enter the workforce want.

In Canada, Millennials seek jobs that provide stability, convenience and balance and it's perhaps for that reason that Millennials there, and in the USA, assess an employer based on the benefits they offer and their level of flexibility.¹ Gen Z on the other hand, is more concerned with fuelling their passion and taking pride in the work they do.

That's not to say they don't want to be rewarded financially or have the security that a good level of pay offers them. According to a report by a Vancouver-based customer intelligence provider, while Millennials want to map out a clear career path and know they have adequate vacation days, a majority of Gen Z respondents, 65% in all, said salary is the most important factor.²

In the UK, most of the 2017 graduates who were surveyed (56%) expected to stay with their first employer for three years or more, and they're three times more likely to stay even longer if they feel they're being offered challenging and meaningful work.³

Gen Z also expects employers to offer professional development opportunities, including mentoring, and they want to have the opportunity to co-create and contribute to projects, which is in line with their desire to pursue

their passions as part of their core work values. Although members of this generation are 'digital natives' they prefer more traditional forms of communication on the job. Research showed they prefer to work collaboratively with a small group in the office⁴ and value face-to-face meetings over virtual communication.⁵

PLANNING FOR THE FUTURE

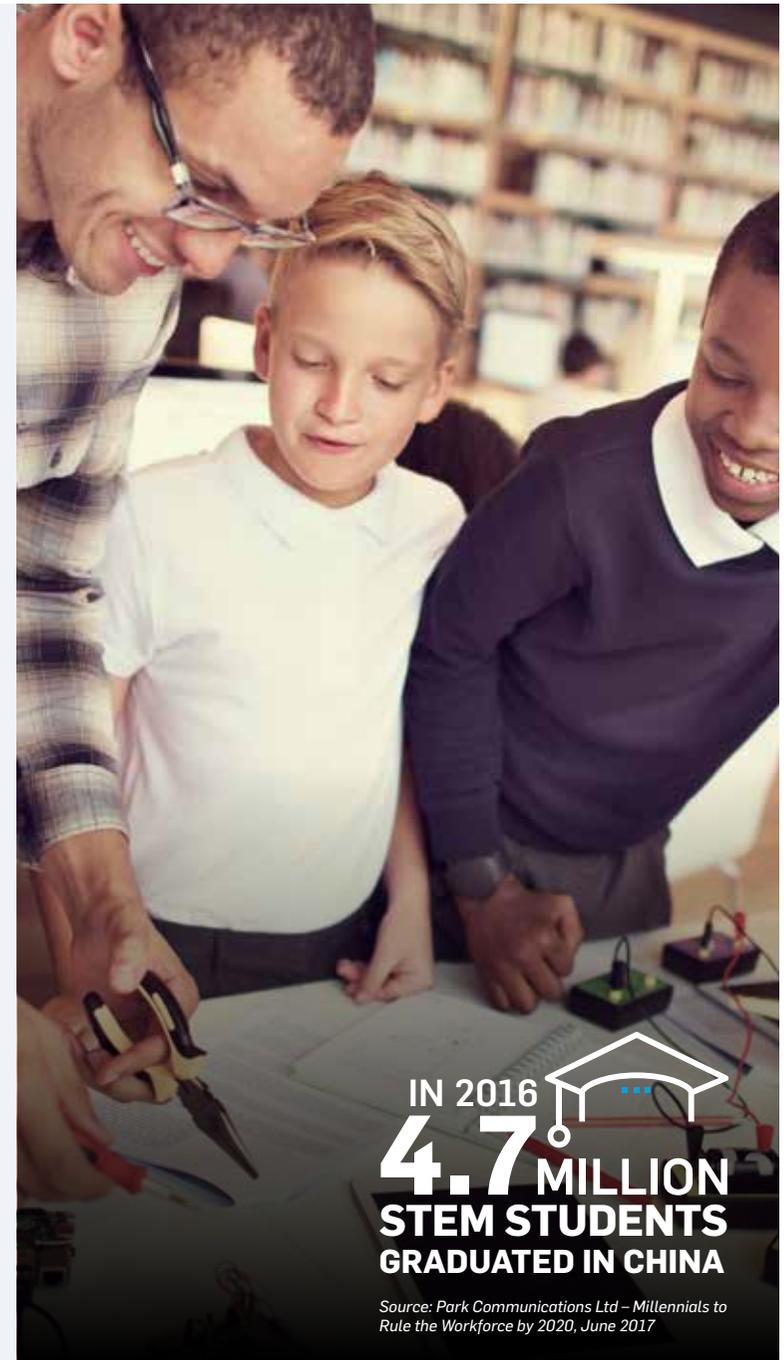
Children make plans for their future from a very young age. Recently, 20,000 school children from around the world were asked what they want to do when they grow up, and what led them to make that choice.

Researchers discovered the majority of seven to 11 year-olds want to be a professional athlete. However, science, technology, engineering and maths (STEM) careers were also popular. The survey, which is the largest of its kind, found that vet, doctor, scientist and engineer (civil, mechanical, electrical) were the 3rd, 6th, 7th and 11th most popular jobs respectively.⁶

Maths or science were in the top two favourite subjects (for girls and boys), apart from in Australia and China where art and design came out on top. That's a good start. But for a business such as ours, encouraging even more girls to study STEM subjects, and ultimately, attracting more women into the engineering and construction profession, is a goal we're actively working towards.

We're optimistic about the possibilities for the future. In other research, 30,000 online respondents across 60 countries, and from all generations, were asked about their dream job and it too shows that STEM careers are attractive options. They were the most popular professions for representatives of Gen Z.⁷

¹ Hays – Gen Y and the World of Work, June 2013
² Vision Critical – The Everything Guide to Gen Z Report, March 2016
³ Accenture – Gen Z Rising Report, 2017
⁴ Robert Half – The Secrets to Hiring and Managing Gen Z Report, 2016
⁵ Education and Employers – Drawing the Future Report, January 2018
⁶ Nielsen – Global Generational Lifestyles Report 2015



IN 2016  **4.7 MILLION STEM STUDENTS GRADUATED IN CHINA**

Source: Park Communications Ltd – Millennials to Rule the Workforce by 2020, June 2017

**TWO
OUT OF FIVE**

OF GEN Z SAY HAVING
A SENSE OF PURPOSE
AT WORK IS IMPORTANT



WORKING AND LEARNING: GLOBAL OUTLOOK

Source: World Economic Forum: Global Shapers Survey 2017 – 41% of Gen Z say a sense of purpose is important when it comes to job opportunities



Source: World Economic Forum – Global Shapers Survey 2017

Advances in technology may have reduced the need to travel, but will the newest generation of colleagues be willing to consider opportunities further afield if it helps them to find a job or get ahead?

A survey by a global consultancy found more people under the age of 35 are being given opportunities abroad.¹ More often, it's in 'short-term, talent development or project assignment roles'.² However, a third of multinational companies surveyed said there were Millennial colleagues in longer-term assignment positions.

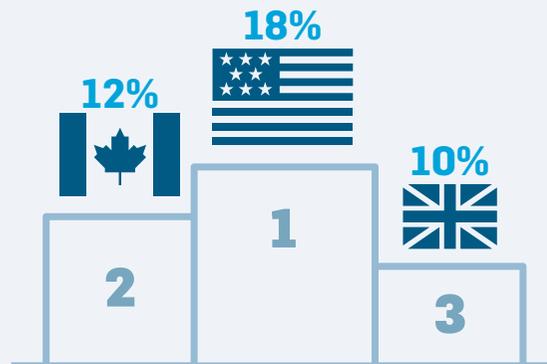
Gen Z are just entering the workforce and our own experience suggests they are less interested in work-related travel than their slightly older counterparts.

Other research found Gen Z believes experiencing other cultures will set them up well for the future. 84% of people who responded to a survey by a leading professional services firm said their ability to work well with people from different backgrounds is a key skill that could give them an edge over other job candidates.³

STEPPING UP...AND OUT?

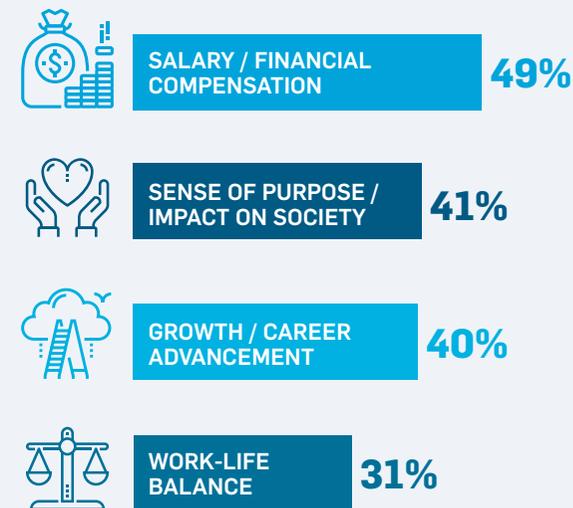
In recent years, start-ups have attracted a lot of attention and investment. But are the younger generations willing to go it alone to bring their bright ideas to fruition? Or are they looking for more stable

The countries young people would like to live in to advance their career:



Source: World Economic Forum – Global Shapers Survey 2017

The most important criteria for young job seekers:



Source: World Economic Forum – Global Shapers Survey 2017

employment options with a regular income? A survey of 18,000 people from three generations in 19 countries found that a quarter of Gen Z respondents were budding entrepreneurs, while for Millennials and Gen X, one in three preferred to run their own show.⁴

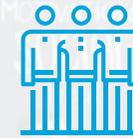
When all participants were given specific options, Gen Z respondents favoured working for an international company over starting their own business. For Millennials and Gen X, the reverse was true.

But that doesn't mean that Gen Z isn't thinking big. In a recent survey of students in grades five to 12 in the USA, 26% of respondents believed they would invent something that would change the world.⁵

¹ Mercer's Worldwide Survey of International Assignment Policies and Practices 2017
² EY Survey – Gen Z's Future will be Brighter than Previous Generations 2017
³ Universum's Generations series 2017
⁴ Gallup Student Poll 2017 National Scorecard

**NINE
OUT OF TEN**

PEOPLE FEEL MORE
CONFIDENT WHEN THEY'RE
CO-WORKING



**WORKING AND LEARNING:
INSPIRING ENVIRONMENTS –
A NEW PURPOSE FOR THE WORKPLACE**

Source: Spaces for Innovation by Kursty Groves and Oliver Marlow, June 2016 – 90% of people feel more confident when they're co-working

In recent years, technology has changed the way we work. Greater connectivity enables us to be productive anywhere, at anytime, and to interact with people who are, physically, a world away. There has been a shift in the way we engage with each other in-person too. Managers are now leading, managing and motivating colleagues from several generations. Gen Z is entering the workforce, while many Baby Boomers who are eligible to retire are choosing to stay in employment instead. In between, Gen X and Millennials have different needs and expectations.

Creating a comfortable, stimulating and inspiring environment for all employees with well thought-out spaces and a flexible and supportive approach are quickly becoming key to attracting and retaining highly skilled talent. And to be competitive, companies must find ways to bring people together.

Collaboration and teamwork are deemed to be the key to innovation, and innovation enables growth. Research shows team workers who are sharing and engaged may be happier. 71% of people surveyed reported feeling more creative, 62% said they are more productive and 90% feel more confident when they're co-working.¹

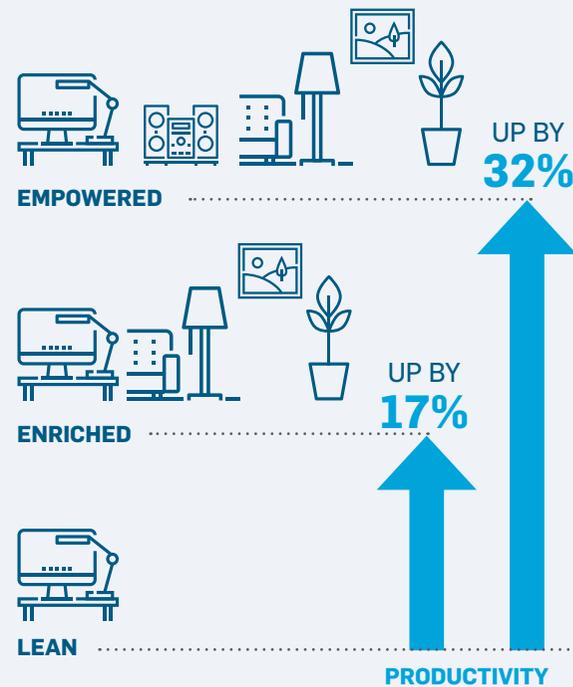


Source: Spaces for Innovation by Kursty Groves and Oliver Marlow, June 2016

GOOD DESIGN MAKES A DIFFERENCE TOO

Research published in the *Journal of Experimental Psychology* included a series of experiments designed to assess the impact of design on business outcomes, and specifically, on productivity.² It was based on a number of different scenarios:

- By enriching a lean space with pictures and plants, wellbeing and productivity rose by 17% with no increase in errors.
- Wellbeing and productivity increased further (by 32% with errors falling) when people were allowed to develop their own space.



Source: Spaces for Innovation by Kursty Groves and Oliver Marlow, June 2016

¹ Spaces for innovation – Kursty Groves and Oliver Marlow, June 2016
² C Knight and S A Haslam – Journal of Experimental Psychology Applied – 16 (2) (2010) 158.



**FIVE
OUT OF SIX**

GEN Z RESPONDENTS IN NORTH
AMERICA DO RESEARCH ONLINE



**WORKING AND LEARNING:
A NEW WAY OF WORKING
AND LEARNING**



ONE-THIRD
OF GEN Z IN NORTH AMERICA
WATCH LESSONS ONLINE

Source: Ologie: This is Gen Z Report, September 2015

Gen Z are tech-savvy. They were born into a connected and mobile world. Millennials may be renowned for being glued to their smartphones but their younger counterparts are the true digital natives.

Nevertheless, the two generations are comfortable living their lives online. Research conducted by a mobile and online messaging business solutions provider found 65% of Gen Z and Millennials globally interact with each other digitally more than they do in the real world.¹



OF YOUNG PEOPLE WOULD FURTHER THEIR EDUCATION BY SEEKING CERTIFICATION FOR SPECIFIC SKILLS

Source: World Economic Forum – Global Agenda: Is online learning the future of education?, September 2016

But their use of technology is about more than keeping in touch. According to our research, Millennials use their smartphone more often than Gen Z for work-related purposes tasks, for example, completing tasks on the move, for education and learning; as well as for navigation and directions.

Gen Z expects services to be available at any time with low barriers to access.² And they believe technology has improved their ability to remember facts and figures. They also embrace social learning environments, where they can be hands-on and directly involved in the education process.

This generation is the 'do-it-yourself' generation. 71% of respondents to a survey in the USA said they believe the phrase 'if you want it done right, then do it yourself'. Perhaps this stems from having easy access to the internet, including YouTube and other online learning opportunities.³

LIFELONG LEARNING

Technology is changing the way we live and work, and even the way we learn. Many universities, including world-renowned institutions, are offering some courses for free or at minimal cost. It means people can gain new skills or update their existing knowledge from anywhere, at anytime.

In 2017, more than 800 universities ran over 9,000 free online courses, or Massive Open Online Courses (MOOCs), as they're called.⁴ That builds on the thousands offered over the past few years.

But is this the future of learning?

In a global survey of more than 35,000 young people, nearly 78% of respondents said they have taken online courses in the past.⁵ Almost 48% said they would be willing to pursue certification for skills, including online certification, once they have started their careers. But so far, completion rates have been low and the majority of organisational learning occurs via traditional methods, despite the widespread adoption of digital technologies.⁶

However, some companies are experimenting with wearable technology, augmented and virtual reality, and artificial intelligence to engage and inspire learners to get ahead.

64% OF YOUNG PEOPLE CONSIDER EARNING AN ADVANCED DEGREE TO BE ONE OF THEIR LIFE GOALS



Source: Ologie: This is Gen Z Report, September 2015

¹ Liveperson – Digital Lives of Millennials Gen Z Report 2017
² Barnes & Noble College – Getting to Know Gen Z Research Report 2015
³ Gen Z @ Work: How the Next Generation is Transforming the Workplace (Harper Business: 2017), pp 225
⁴ Class Central – by the Numbers: MOOCs in 2017
⁵ World Economic Forum – Global Agenda: Is Online Learning the Future of Education?, September 2016
⁶ Wired – Online Courses Don't Work, But Education Can Still Be Disrupted, January 2018

NEARLY TWO-THIRDS

OF GEN Z SAY THEY CAN'T
LIVE WITHOUT THEIR
SMARTPHONE



CONNECTIVITY:
THE POWER IS
IN THEIR HANDS

The majority of people in the UK can't imagine a life without the internet.¹ They spend hours surfing, streaming, shopping or browsing social media each day. And for most of that time (60%), they're using a mobile device.

In fact, a survey of 1,000 UK consumers found the younger generations prefer to access information and interact with others via their phone.² Millennials spend just over five hours a day on their mobile (5.2 hours). For Gen Z, it's just under six (5.9 hours).

Recent research explained the strength of Gen Z's connection to their smartphones in more detail. The study of 4,000 people between the ages of 13 and 22 across nine cities showed respondents check their mobile every three minutes on average, although almost a quarter (24%) check as often as every two minutes.³

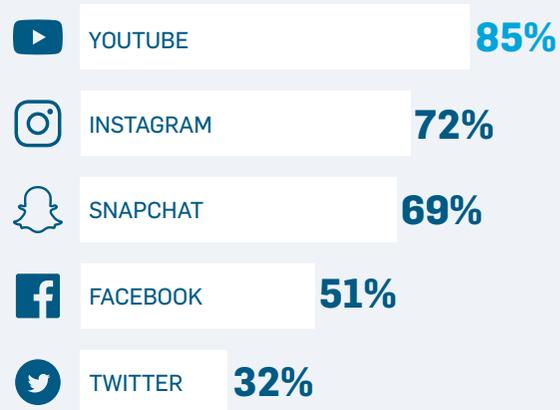
The same report suggests that the device is an important part of their lives. Connectivity and the tools that enable Gen Z to stay in touch with others, are vital to them. So much so, nearly two-thirds would 'find it difficult to live without their smartphones'.⁴

In 2018, a suite of reports revealed:



Source: 2018 Global Digital Report – We are Social and Hootsuite

The social media platforms Gen Z said they used the most in 2018:



Source: 2018 Global Digital Report – We are Social and Hootsuite

SWITCHED ON

So how does Gen Z's relationship with technology more broadly impact on them and others? According to one study, growing up as a digital native in an on-demand economy has created an 'always-on, on-demand' generation.

We all benefit from having information and services at our fingertips, whether that's streaming a movie, booking an e-ticket, connecting with friends in real-time or ordering a product for fast delivery. But Gen Z has grown up in this fast-paced environment and expects instant access to a world of choice. Analysts predict it will make them more demanding consumers.

Many people of this generation are also used to being in the spotlight and sharing their experiences through social media. Sometimes, they feel pressure to demonstrate they're leading a rich and interesting life. This creates what is referred to as 'the Instagram effect' on consumer spending.⁵

¹ The Ipsos MORI Almanac, December 2017
² Adobe Reveals Gen Z are the UK's Biggest Content Consumers: Engaging with over 10 Hours of Online Content a Day, August 2018
^{3,4} The Generation Z Study of Tech Intimates Report, October 2017
⁵ Fung Global Retail & Technology – Gen Z: Get Ready for the Most Self-Conscious, Demanding Consumer Segment, August 2016



65%
OF MILLENNIALS & GEN Z
INTERACT WITH EACH OTHER
DIGITALLY MORE THAN
IN THE REAL WORLD

Source: LivePerson Study, October 2017



**TWO
OUT OF FIVE**

OF GEN Z CREATE
CONTENT AT
LEAST ONCE
A WEEK

**CONNECTIVITY:
CONSUMERS OR CREATORS?**

Are smartphones a distraction or do they help drive productivity? In the case of Gen Z, the answer is they do both. According to a recent report, the devices help them '... kill time as well as be more efficient and entertained.'¹

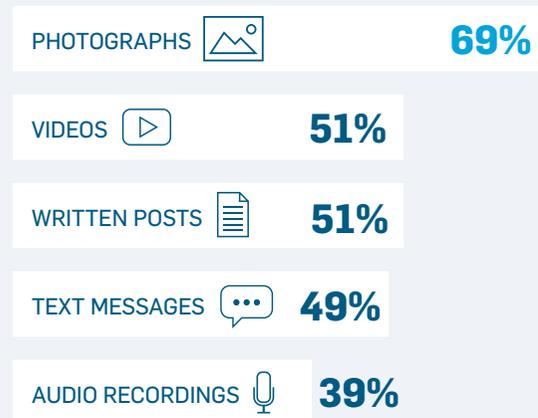
So what are they doing when they're using their device? According to the same report, more than half of Gen Z respondents (52%) are creating and sharing content with others.² That includes photos, videos, written articles, text messages and audio recordings.

43% of people surveyed by the same company create content at least weekly and a similar number consider sharing to be important. They're spreading news and views through online platforms, apps and even their own website.³

It gives these digital natives a way to engage with others and – importantly – express themselves. Almost two-thirds (62%) are more comfortable doing this digitally than in person.⁴

It helps to highlight a point made in a 2017 survey, which found in North America and Europe access to the internet (44% and 33%) and free media or social media (44% and 33%) are the most important factors contributing to youth empowerment.⁵

Type of content created by Gen Z:



Source: The Generation Z Study of Tech Intimates Report, October 2017



86% OF GEN Z SAY THE VIDEOS THEY USUALLY WATCH ARE **LESS THAN 10 MINS** AND THEY PREFER CONTENT THAT IS **SHORT, SWEET AND FUNNY**

Source: Awesomeness Report – Gen Z: Leaders of the mobile social movement, October 2017

SURFING OR STREAMING

Gen Z and Millennials differ in the way they engage with social media. The most recent figures suggest across the UK, USA and Canada, Gen Z is switching from Facebook to Snapchat.⁶ Usage by Millennials remains stable. Video is an incredibly powerful medium – on YouTube alone, almost 400 hours of content is uploaded every minute.⁷ It's the most popular social media platform for Gen Z.⁸

The younger generation is moving away from the more traditional channels too. Gen Z spends 10% less time watching TV than Millennials, that's just over 13 hours per week compared with nearly 15 hours. And one in five Gen Z respondents say they don't watch TV at all.

Instead, 70% of Gen Z representatives surveyed say they prefer streaming services like Netflix and, when asked which screen they would choose if they could only keep one, none of them chose the television.

Whatever the future holds, the content that is created for the younger generations must be engaging. Recent reports claim the average attention span of a Gen Z is just eight seconds.⁹

^{1, 2, 3} The Generation Z Study of Tech Intimates Report, October 2017
⁴ Awesomeness Report – Gen Z: Leaders of the mobile Social Movement 2017
⁵ World Economic Forum – Global Shapers Survey 2017
⁶ eMarketer – Understanding Teens and Their Smartphone Habits 2017
⁷ Statista – Hours of Video uploaded to YouTube Every Minute 2015
⁸ We are Social – Three Differences in How Gen Z and Millennials Use Social Media, March 2018
⁹ BD Network, White Noise Generation?!, 2016



MORE THAN TWO-THIRDS OF GEN Z PREFER STREAMING SERVICES TO TV

Source: The Ipsos MORI Almanac 2017 – 70% of Gen Z prefer streaming services like Netflix



NEARLY FOUR OUT OF FIVE

YOUNG PEOPLE THINK
TECHNOLOGY IS
'CREATING
JOBS'

CONNECTIVITY:
EMERGING TECHNOLOGY

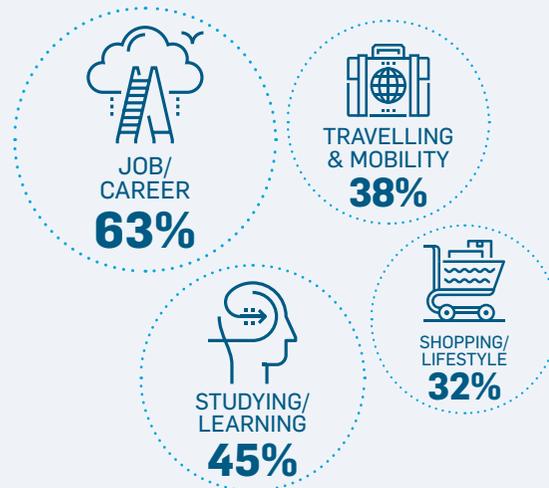


Our research suggests that our younger colleagues are tech savvy and hyper-connected, but the speed of technological change they're experiencing is unprecedented. So, does this concern them?

Overall, we've found Gen Z to be eager adopters of wearable and networked devices. The Internet of Things (IoT) is likely to have the greatest impact on their lives. Millennials, on the other hand, are more excited about self-driving cars and artificial intelligence.

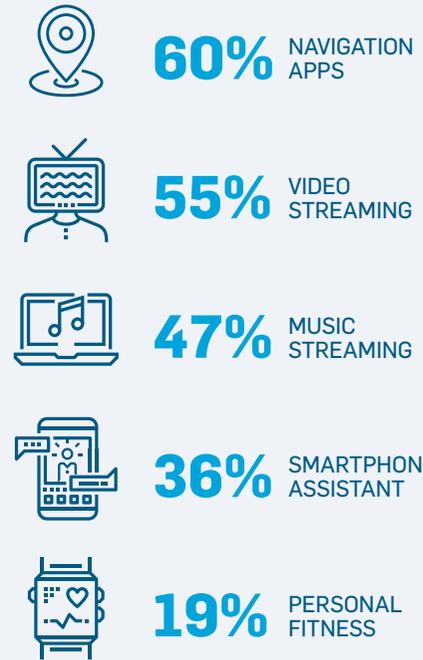
Both generations see significant potential for new technology to transform the way we work. Three-quarters of the 1,600 respondents to a survey by a professional services firm (76%) agree it will change the nature of the work they do. Two-thirds (66%) think new technologies will enable them to increase their productivity and over half (52%) believe it will allow them to focus on more interesting and 'value added' work. Despite widespread uncertainty – and in some cases, fear – over the impact of new technology, only 17% of respondents say it will decrease the number of jobs available to them.¹

In the next decade, young people think advances in technology will significantly impact on:



Source: World Economic Forum – Global Shapers Survey 2017

In the USA people are using artificial intelligence services regularly:



Source: InsideSales.com – The State of Artificial Intelligence 2017

WHERE TO FROM HERE?

In North America, young people have told researchers they believe the energy (23%), healthcare (18%) and education (15%) sectors will benefit the most from the adoption of the latest technologies.²

In Europe, under 35 year-olds in countries including the UK, say it's manufacturing (27%), followed by the energy (19%) and healthcare (16%) sectors.

And what do they see as being the next big thing? Respondents believe artificial intelligence (28%), as well as biotechnology (12%) and robotics (9%), could transform our lives.

¹ EY Survey 2016 – Gen Z's Future will be Brighter than Previous Generations
² World Economic Forum – Global Shapers Survey 2017

**MORE
THAN HALF**

OF RESPONDENTS IN THE USA SAID

Google

IS THE MOST
TRUSTED
AI BRAND

**VALUES AND BEHAVIOURS:
FACT VERSUS FICTION**

Digital technology has changed the way we consume goods and services and challenged us to consider the importance of access versus ownership.

In a survey of more than 1,000 consumers in the USA who were familiar with the sharing economy, many reported being enthusiastic about the potential of this type of exchange, once they had tried it.

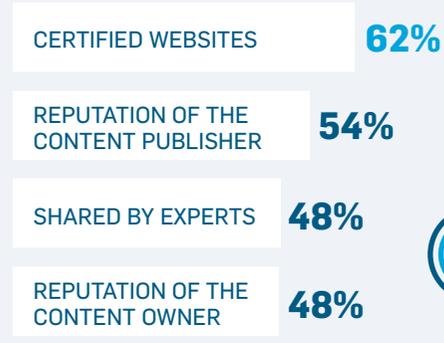
But they also had concerns. Overall, 72% of people felt the sharing economy experience is not consistent and 69% said they wouldn't trust the sharing economy until it's recommended by someone they trust.¹

In other research, Gen Z reinforced the importance of background checks, for example, to guarantee their safety when they're using ride sharing services. 63% of Gen Z cited it as one the top three most important things and 28% said it was the most important.²

Gen Z also reported caring more about a service provider having insurance than any other generation. In fact, 11% of Gen Z, nearly twice as many as the other generations surveyed, said the most important thing a sharing company can do to earn their trust is to have insurance for users.

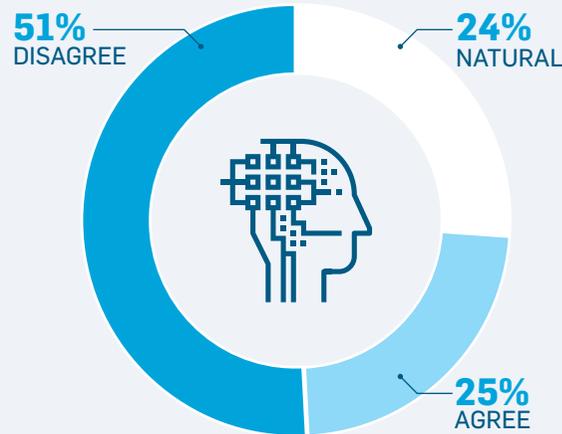
Separating fact from fiction online is not always easy but it's important to the younger generations. In the USA, a study of more than 1,200 people between the ages of 14 and 59 found Gen Z demand authenticity in their online

What makes online content trustworthy?



Source: World Economic Forum – Global Shapers Survey 2017

Young people would trust decisions made by a robot on their behalf:



Source: World Economic Forum – Global Shapers Survey 2017

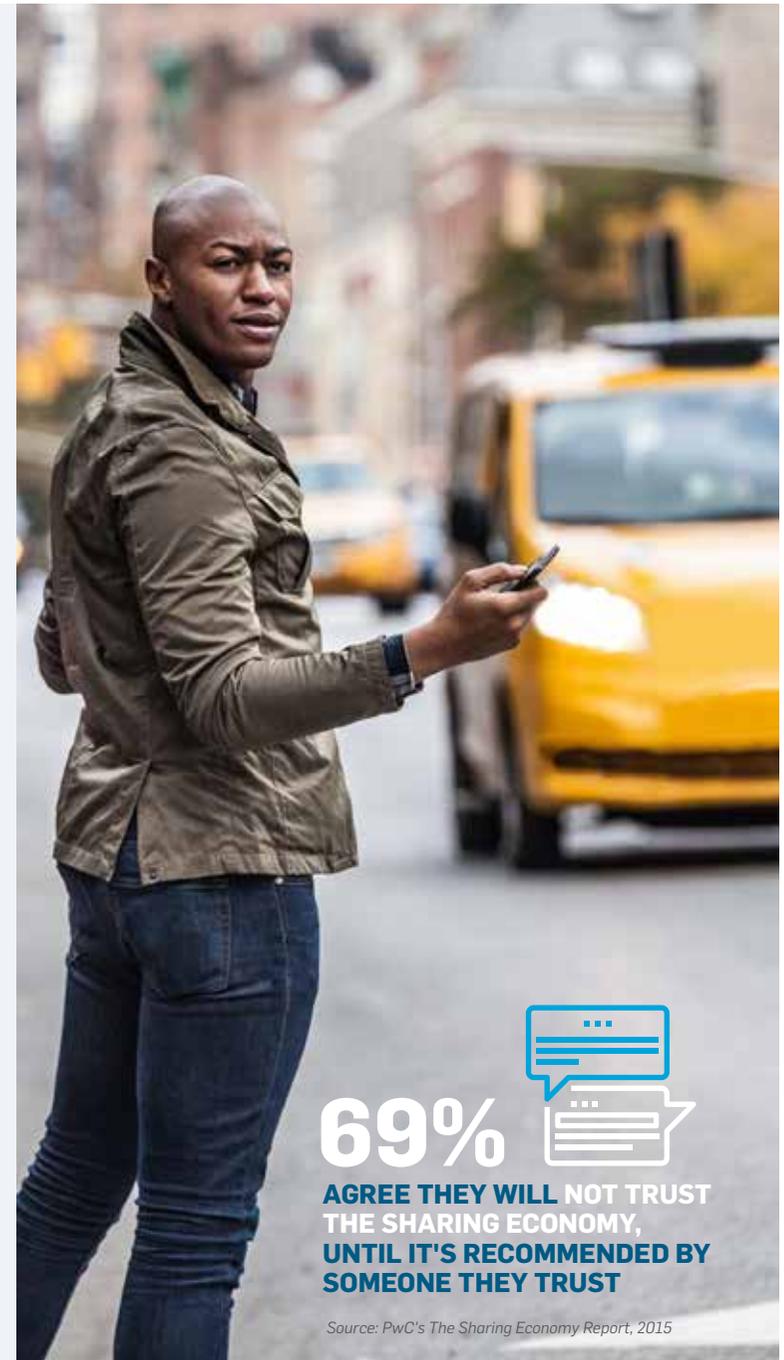
interactions.³ 41% said they want a guarantee that a person is who they say they are (particularly in the case of social and dating sites). A similar number of respondents (39%) want retailers to prove reviews are genuine. The results were similar for Millennials.

UNDERSTANDING WHO TO TRUST

Researchers asked 35,000 young people from around the world about their views on fake news. They found respondents want the information available online to be factual and trustworthy and they're mindful of the content they circulate.⁴ So how do they assess what they're reading or watching?

The majority of people (62%) surveyed said content is trustworthy if it's on 'certified websites'. They also considered the reputation of the publisher (54%) and whether or not the information had been 'shared by experts' (48%). The 'reputation of the content owner' was also important (48%).

¹ PwC – The Sharing Economy Report, 2015
² The Center for Generational Kinetics and Jason Dorsey – iGen Tech Disruption Research, 2016
³ WP Engine – The Future of Digital Experiences: How Gen Z is Changing Everything, December 2016
⁴ World Economic Forum – Global Shapers Survey 2017



69% 
AGREE THEY WILL NOT TRUST THE SHARING ECONOMY, UNTIL IT'S RECOMMENDED BY SOMEONE THEY TRUST

Source: PwC's The Sharing Economy Report, 2015



**NEARLY
THREE
QUARTERS**

OF GEN Z WANT TO ACCESS
PERSONALISED
CONTENT ACROSS
THEIR DEVICES

**VALUES AND BEHAVIOURS:
CONVENIENCE...
AT WHAT COST?**

Source: Ologie: This is Gen Z Report, September 2015 – 72% of Gen Z want to connect to personalized content across all devices





62%
OF PEOPLE WERE
UNAWARE
THEIR DATA IS
BEING COLLECTED

Source: Study US Consumers Think Personal Data Worth – Loop Me Survey, December 2017

According to researchers, Gen Z's connection to the digital world is 'so ubiquitous and seamless that the digital experience is their human experience.'¹

This generation has embraced the opportunities created by mobile technology. So much so, 60% of respondents to a survey in the USA say they would rather lose their wallet than their mobile phone.²

This has serious implications for the way young people receive and consume information. More than three-quarters of respondents to this same survey said they prefer ads customised to their current activity, or to their location. And almost all (95%) American and UK representatives questioned make in-store purchases based on ads they've seen on their mobile devices. In addition, 42% will engage with an ad when their data is used correctly to provide them with creative experiences.

Our research, however, suggests people are less sure about *sharing* their data. For example, slightly more Gen Z respondents (45%) said they would be 'very

Attitudes to data privacy and advertising:

 **34%**
OF UK CONSUMERS

Agreed 'Brands should use anonymous data to show more relevant & interesting ads...'

 **72%**
OF US CONSUMERS

Source: Loop Me Survey, December 2017 – US consumers think their personal data is worth only \$244 per year
<https://martechtoday.com/study-us-consumers-think-personal-data-worth-244-per-year-207995>



THE VALUE OF EUROPEAN CONSUMERS' PERSONAL DATA TO GROW TO NEARLY **ONE TRILLION** EUROS ANNUALLY BY 2020

Source: The European Commission 2016

unlikely' to give up their personal details in exchange for better transport information to create a more seamless journey, than they would be to share it (43%). Millennials were a little bit more likely (47%) to share their data.

WHAT WILL THEY BE MISSING?

In the competitive global market, brands are increasingly concerned about enhancing their customers' experience. Technology enables them to interact with potential and existing buyers on a new level, for example, by learning their preferences and suggesting products and services that may appeal to them. But to benefit from this relationship, people must provide something in return.

A study of more than 1,000 people in the USA found members of Gen Z are comfortable sharing their data to receive a more personalised service.³ In fact, half of the respondents said they would stop visiting a website if it didn't anticipate their needs.

Other generations didn't agree. The survey found Millennials and Gen Z were over 25% more likely than Gen X and Baby Boomers to favour a predictive internet. That's not to say they don't value security. Our own research found there is a clear concern across generations in the UK, USA and Canada regarding cyber security. Millennials show more of a tendency to take measures to protect themselves online, whether that is with different passwords or privacy settings.

^{1, 3} WP Engine – The Future of Digital Experiences: How Gen Z is Changing Everything, December 2016
² VERVE's research, September 2016 – Mobile Prodigies™: Millennials and Gen Z

VALUES AND BEHAVIOURS: A GREENER FUTURE



**EIGHT
OUT OF TEN**

GEN Z RESPONDENTS SAY
GOVERNMENTS NEED TO LISTEN
TO THEM MORE
ON SUSTAINABILITY



Young people are, understandably, concerned about the environment. They've been born into a world that's coming to terms with climate change and trying to find a way to manage dwindling resources and protect our precious flora and fauna.

According to our own research, Gen Z, more so than Millennials, believe more needs to be done to look after the environment. They also want to have a stronger voice on the matter. 83% said governments need to listen to young people about this issue. 80% of people also believed current leaders hadn't done enough to protect the environment, and feel it's up to them to build a more sustainable future.

Our survey respondents also have a view on who should take action to help protect the planet. 81% of Gen Z thought government and the private sector share responsibility for developing clean technology and 84% expected more government investment in renewable energy.

Many also understand this comes at a cost. According to a survey by an Abu Dhabi based renewable energy company, young people in developed countries were more concerned about the financial costs of going green than those in less developed nations.¹

The majority of Gen Z believe solar and wind energy should be a priority:



63% OF GEN Z SAID **SOLAR ENERGY** SHOULD BE THE PRIORITY FOR THE FUTURE OF THEIR COUNTRY



49% OF GEN Z SAID **WIND ENERGY** IS THEIR PREFERRED FUTURE ENERGY SOURCE

Source: The Masdar Gen Z Global Sustainability Survey, 2016

Young people are prepared to boycott companies that harm the environment:

49% OF GEN Z ARE WILLING TO **SPEND MORE** TO BUY SUSTAINABLE PRODUCTS



31% OF GEN Z SAY THEY HAVE **BOYCOTTED** NON-SUSTAINABLE COMPANIES

Source: The Masdar Gen Z Global Sustainability Survey

But how do their views on the environment affect their day-to-day decision making?

We have found Gen Z is more likely than Millennials to take a longer or less convenient transport route if it's more sustainable. While other research showed they're willing to pay more for products and services from companies that are committed to making a positive social and environmental impact.²

THE FUTURE

Is this the beginning of a cleaner, greener future? Research has shown that many people want to make a difference. In fact, more than half of respondents (59%) to a survey of Gen Z in 20 countries said they're interested in working or studying in an area related to sustainability.³ But the challenge ahead of them is significant. According to a report by a major energy producer and supplier, rapid urbanisation means the use of energy and other resources will grow even faster than the population, from 66% in 2010 to around 80% by 2040.⁴

^{1,3} The Masdar Gen Z Global Sustainability Survey, 2016
² Nielsen Insights – Younger Consumers Endorse Healthy Foods with a Willingness to Pay a Premium, April 2015
⁴ Shell Global – New Lenses of Future Cities, June 2014

51% 
 OF GEN Z SAID THEY HAVE **CUT** THEIR ENERGY CONSUMPTION



Source: The Masdar Gen Z Global Sustainability Survey, 2016



OVER HALF

OF RESPONDENTS ARE UNSURE OF, BUT INTRIGUED BY, THE IDEA OF SELF-DRIVING CARS

- /Autonomous
- /Sensing
- /Communication
- /Battery
- /Navigation
- /Mirrorless
- /Ecology

Self-Driving



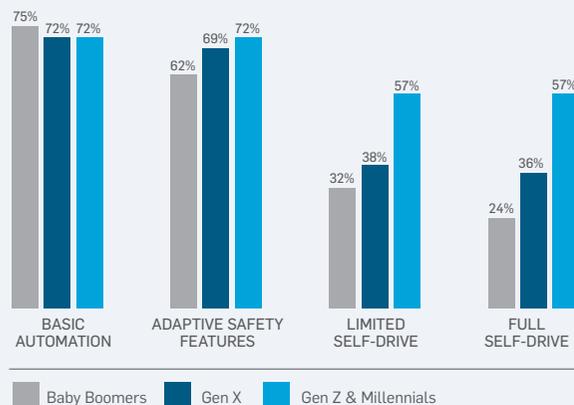
VALUES AND BEHAVIOURS: SMARTER CONNECTIONS

Rapid advances in technology and the extraordinary volume of data created by individuals and organisations is changing yet another aspect of our lives. That is, the way we move around our towns and cities. It's easier to plan and undertake our journeys now, whether we're travelling by road or rail. But the sophisticated maps, real-time travel updates and contactless payment options are just the beginning of a more significant digital transformation.

Artificial intelligence, virtual and augmented reality, the Internet of Things and big data will soon reshape our travel experience, from the moment we decide there is somewhere we need to go to the time we arrive at our destination. Technology is already advanced enough to enable some vehicles – from lorries to subway trains and even our own cars – to drive themselves. But there are a lot of physical, behavioural, safety and legislative obstacles to overcome before we can embrace the newest wave of innovation and take our hands off the wheel with confidence.

In several cities, teams of experts are putting the technology and the supporting infrastructure to the test ahead of a full-scale roll-out. But a recent study shows people around the world are 'curious, but hesitant' about being in the back seat.¹

Percentage of US consumers interested in different levels of vehicle automation:



Source: Global Automotive Consumer Insight Platform, Deloitte

They're also weighing up the potential cost of these advanced features. A significant number of consumers who responded to a survey by a professional services firm said the car makers should be the ones paying to bring new technology to market. Gen Z were willing to pay the most for a high-tech solution. Millennials were also accepting of the additional cost.

But their cautious approach hasn't stopped the two generations thinking about the future and looking forward to the other benefits driverless cars will bring. Our research found Gen Z would use the time they would usually spend driving watching more films, blogging and gaming instead. Millennials would like to spend the extra time reading.

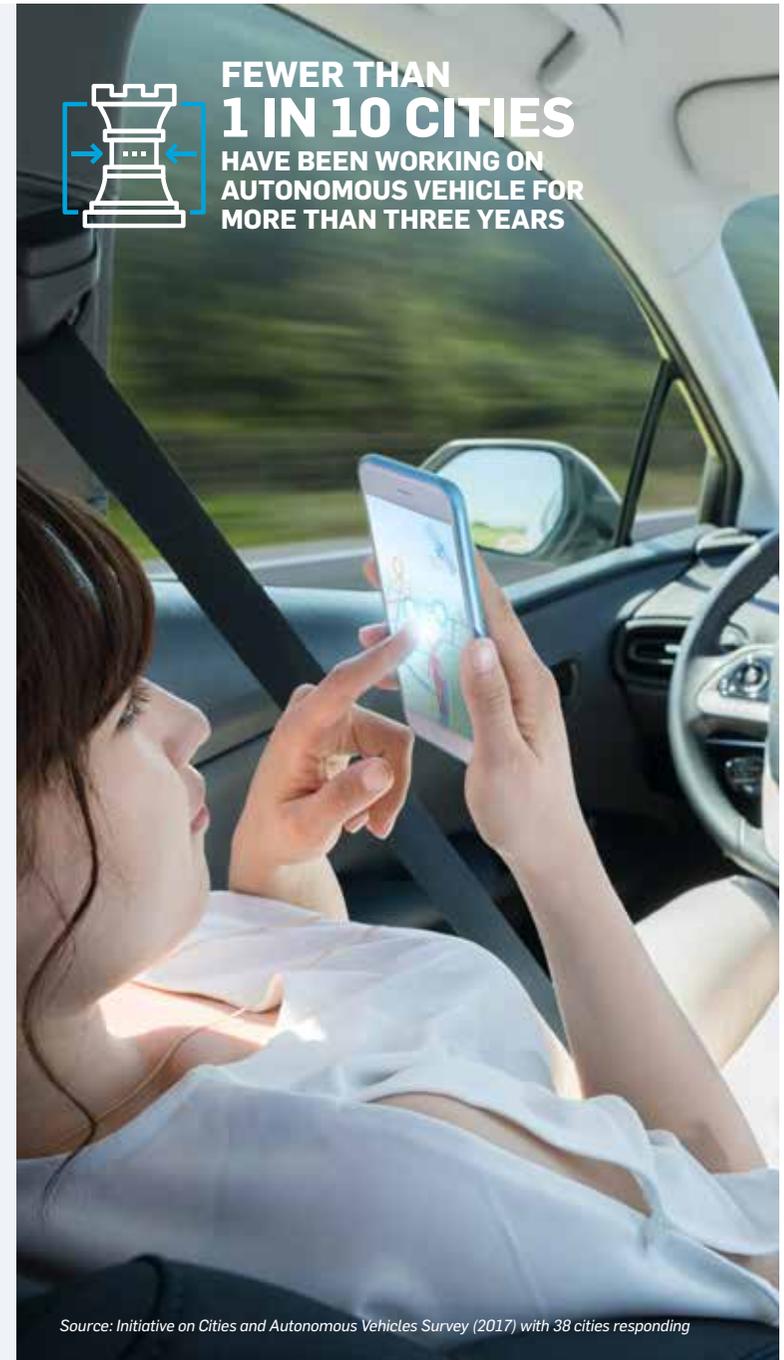
BARRIERS TO ADOPTION

We're working closely with industry partners and the UK Government to understand the implications of driverless technology for everyday road users; infrastructure owners and operators; and car makers. We're trying to identify the ways in which our streets and public spaces will need to change to accommodate autonomous vehicles and how quickly we need to adapt.

In 2017, researchers studied many cities around the world that were getting ready for autonomous vehicles, whether that was through small-scale testing, or changes to policy and legislation. In doing so, they identified a number of barriers to the adoption of driverless technology. Representatives of 30 urban areas told researchers the challenges they face include a lack of funding and the capacity to manage pilot projects.²

The research also looked at some of the potential uses of the technology. Many cities were planning to use autonomous vehicles to bridge gaps in existing transport provision, the so-called 'last mile'.³

¹ Ipsos – Public Opinion on a Future with Driverless Cars, March 2018
^{2, 3} Bloomberg Philanthropies – Initiative on Cities and Autonomous Vehicles, 2017



Source: Initiative on Cities and Autonomous Vehicles Survey (2017) with 38 cities responding

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