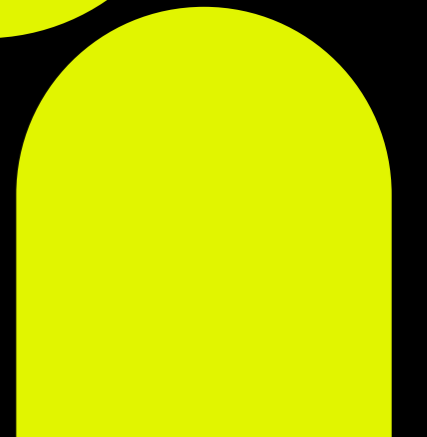
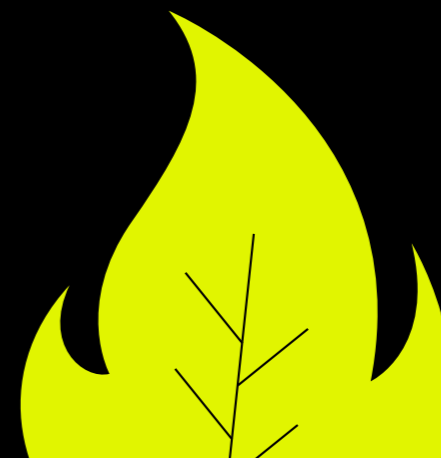
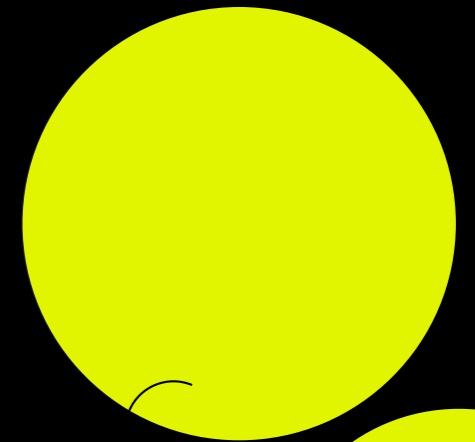
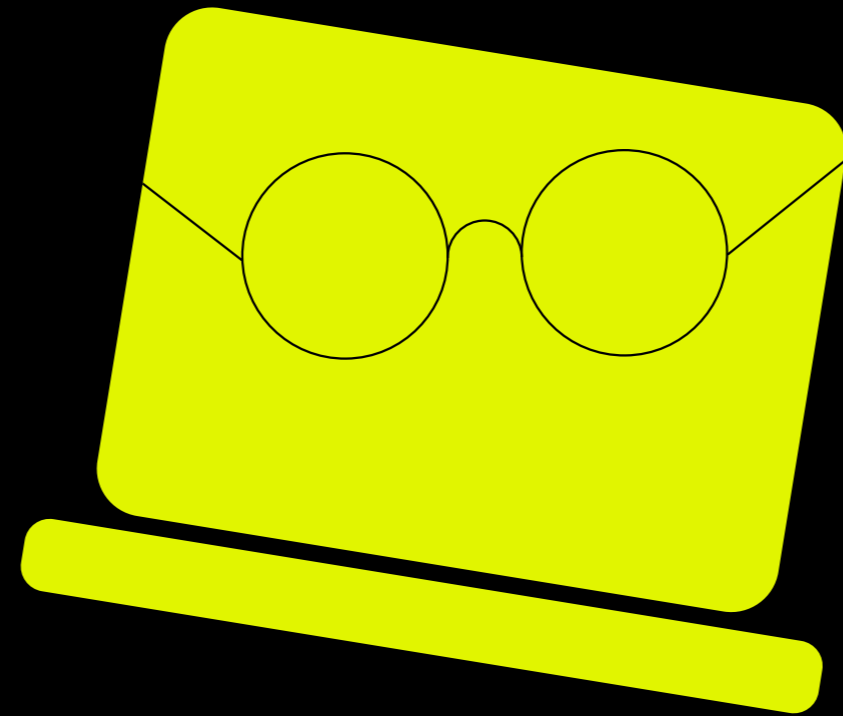
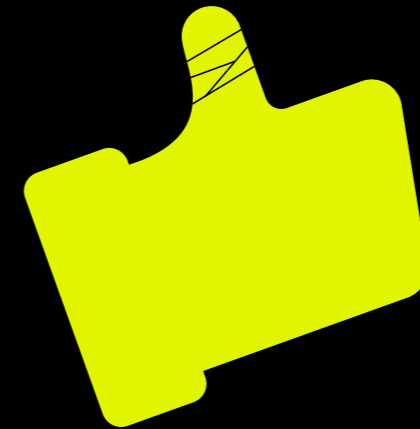
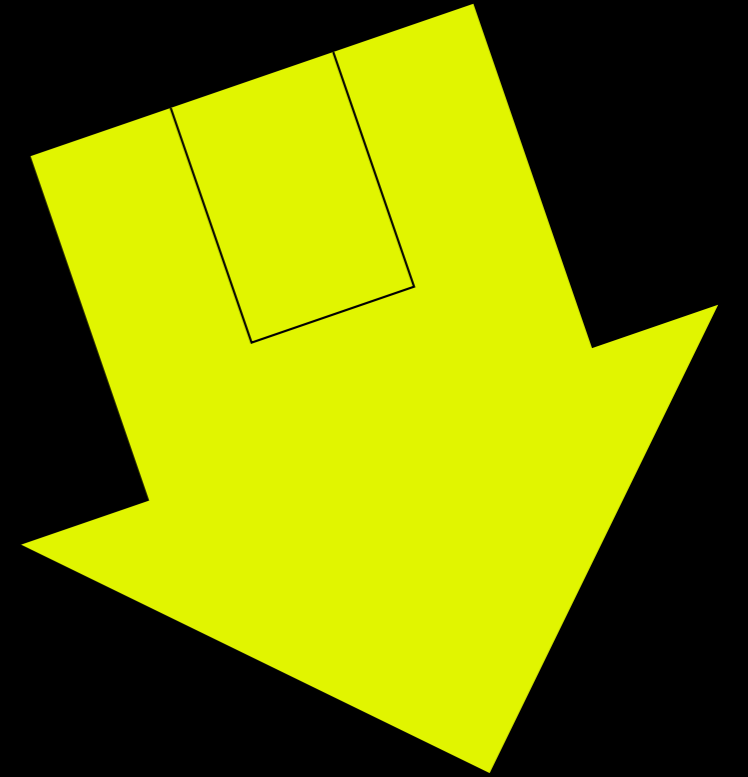
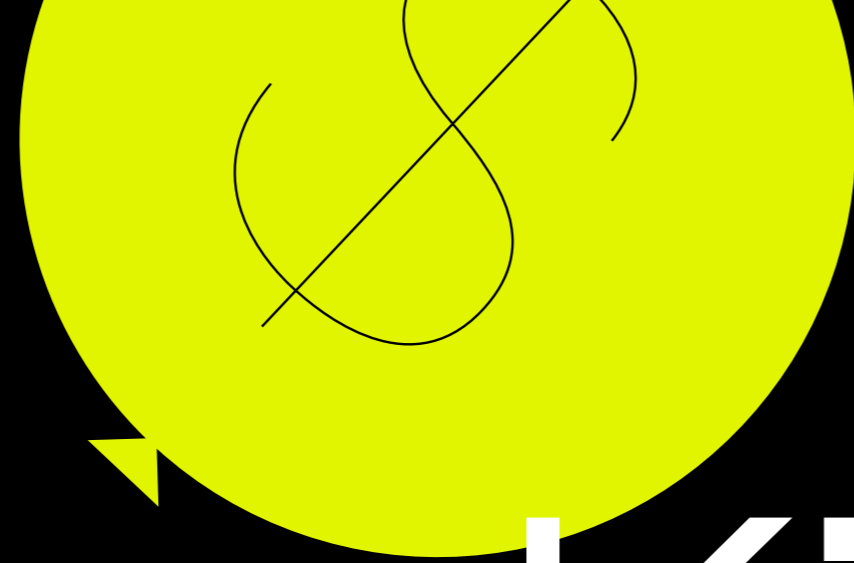


3rd Edition

2024

# The HumanKind™ Study



*Leo Burnett*

# Three years in...

In this third edition of The HumanKind™ Study, which reports on the main issues, concerns, and problems impacting the lives of Canadians, we are seeing a shift in the Canadian psyche.

In 2022, when the study first launched, it reflected the sense of **Fear** Canadians were feeling: the pandemic was raging on; people felt incredibly vulnerable and isolated with no solutions in sight. The second report in 2023 captured a troubling sense of **Resignation**: the world, the environment, and Canadians' lives were still filled with uncertainty, division, and hardships despite the pandemic being all but over.

## So where are Canadians in 2024?

Yes, another year comes with another set of problems to navigate. Canadians have been hit with inflation, a housing crisis, environmental disasters, global conflicts, and more. Our research reveals they are still feeling overwhelmed, frustrated, isolated from one another, and, in some cases, barely hanging on.

But despite it all, or perhaps because of it, Canadians aren't giving up. They are concerned about their fellow Canadians. They want to be brought together, not pulled apart. They want to be part of real, tangible change. And they want/expect brands to do the right thing.

In 2024, the theme for Canadians can be distilled down to being **Ready**. Ready to take on challenges. Ready for innovative solutions. Ready for new leadership. Ready for generational changes. And ready to start living the life they want now.

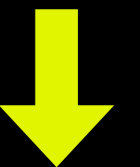
We see this attitude in two measures that have been tracked over three years. First, despite everything they are facing, Canadians feel more content than they did last year ( up 7 percentage points to 53%). Second, they are less afraid of the unknown, having been hardened, to some degree, by the pandemic, and are much less concerned about what hardships might come next (down 14 percentage points to 49%). When taken together with the hundreds of conversations we had with Canadians, we see a willingness and desire to take on the challenges of the year ahead head-on.

Throughout the Seven Human Problem Themes represented in this study, the aim is simple: deeper insight into what is keeping Canadians up at night. Because the more we know, the more we can equip brand owners with the knowledge they need to help people with their most pressing concerns. We know that brands can't solve everything, but as we heard time and time again, every little bit helps.



up 7 % points

Canadians feel more content than they did last year (53%)



down 14 % points

Canadians are less afraid of the unknown...and are much less concerned about what hardships might come next (49%)

# Ready. Set. Go?

While Canadians are ready for change, they do see some things standing in their way. They're skeptical of whether brands are ready because Canadians don't think brands get them or what they're going through. This finding is concerning, but it can be overcome, and that's exactly what this report is designed to do. In each theme, you'll find starting points for how brands can be part of the solution and not the problem. And these starting points are just the beginning because every brand in every category can approach these problems in their own way, and we hope they do.

Let's go.

77%

of Canadians are either unsure or don't believe brands clearly understand the concerns, issues, or problems facing Canadians

**Leo Burnett Canada developed this report in partnership with Maru/Blue.**

*Leo Burnett*

Leo Burnett Group Canada is a creative consultancy using strategy, design thinking, communications, and experience design to solve the biggest business challenges of the modern age. We believe creativity has the power to transform human behaviour, and we use creative in all forms to better the relationship between people and brands.

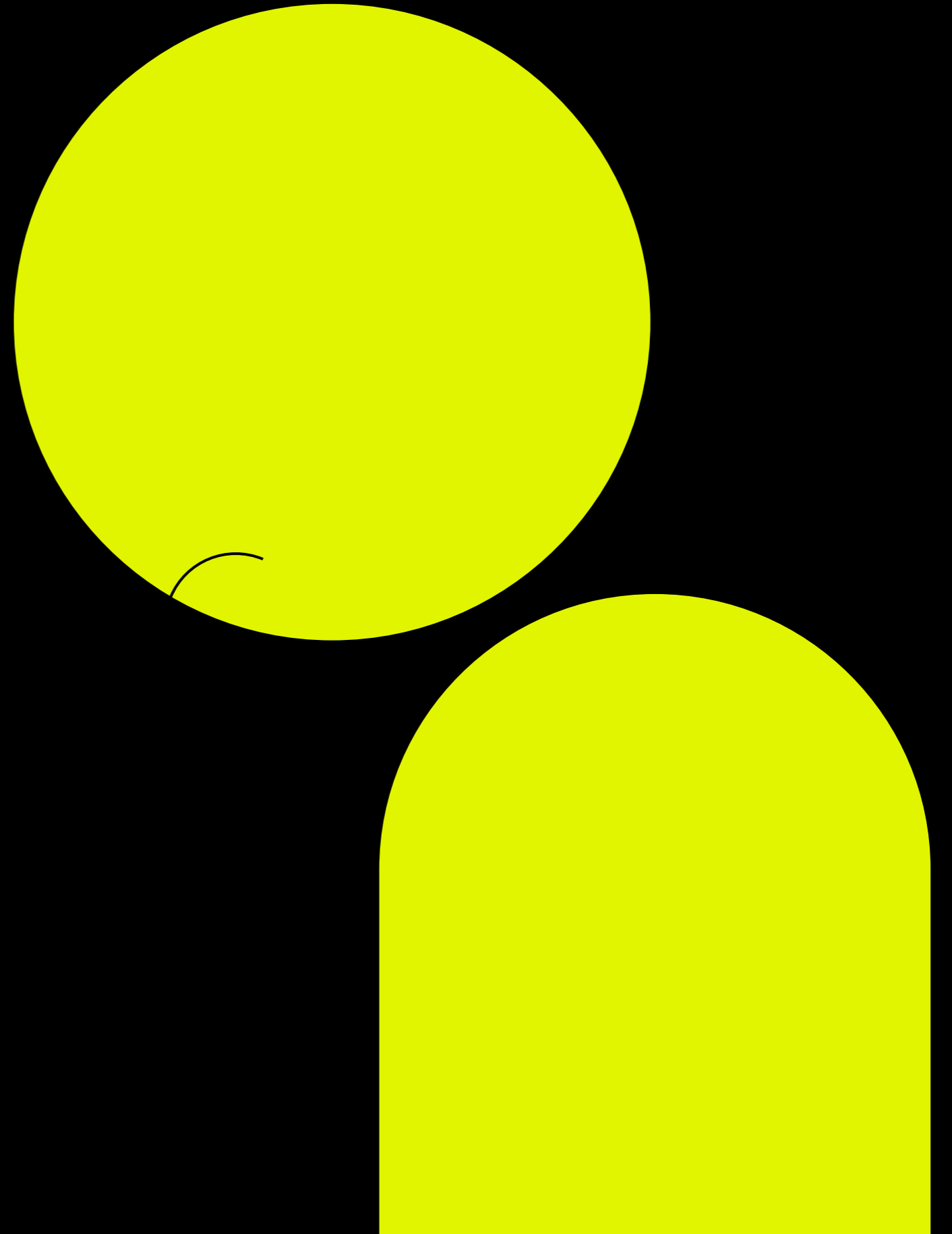
maru/B<sup>L</sup>UE

Maru/Blue is a technology-enabled, agile insights provider connecting our clients with engaged, deeply profiled, and quality respondents. We operate at the intersection of behaviour and emotion, so our approaches capture how people Feel, Think and Behave, providing a holistic System 1 and System 2 understanding of consumer behaviours and the intrinsic, emotional influences that underpin them.

Young and Lonely	6
Inflated Prices; Deflated People	15
No Place Like No Home	26
Climate Has Changed	36
AI: Help or HAL?	46
Status Update: It's Complicated	55
Patience-Centered Care	62

# Themes

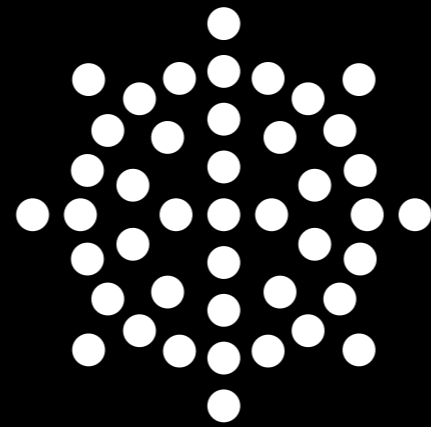
# Young and Lonely



# A long time coming.

Lockdowns. Remote work. Urbanization. Technology. These are just a few of the many factors contributing to an increase in loneliness across Canada. It has now reached a boiling point and needs attention.

Survey data reveals that the majority of Canadians are experiencing loneliness at least some of the time, and 1 in 4 Canadians are experiencing it frequently or always. And that's only those who admit it. The true measure of loneliness may be much greater. The good news? People want help, and brands are able to help them.



# 57%

of Canadians report feeling lonely at least sometimes

You can feel lonely even when you're surrounded by a lot of people. Similarly, one can live alone without feeling isolated, as long as you have a strong social network.

—Juliette, Millennial, Quebec



77%  
of generation Z and...

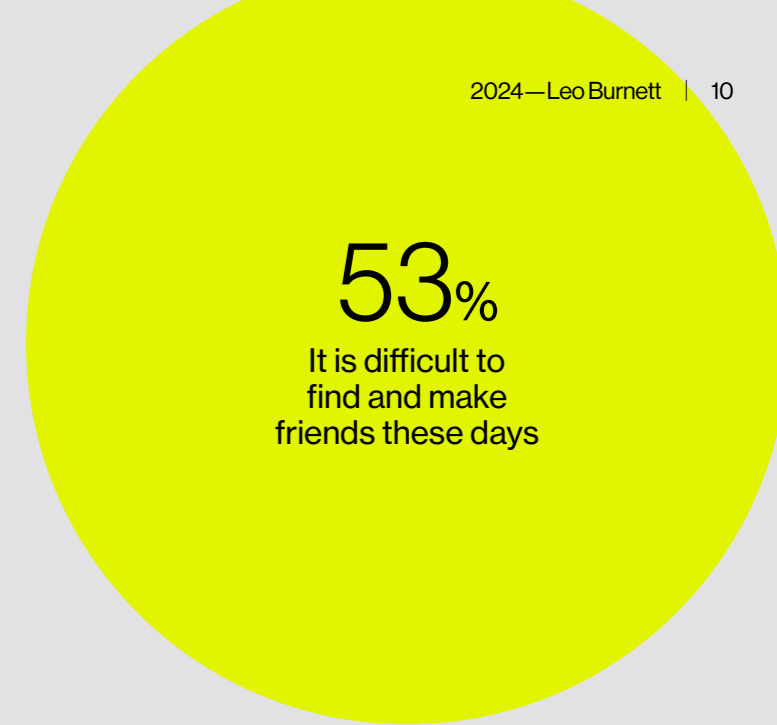
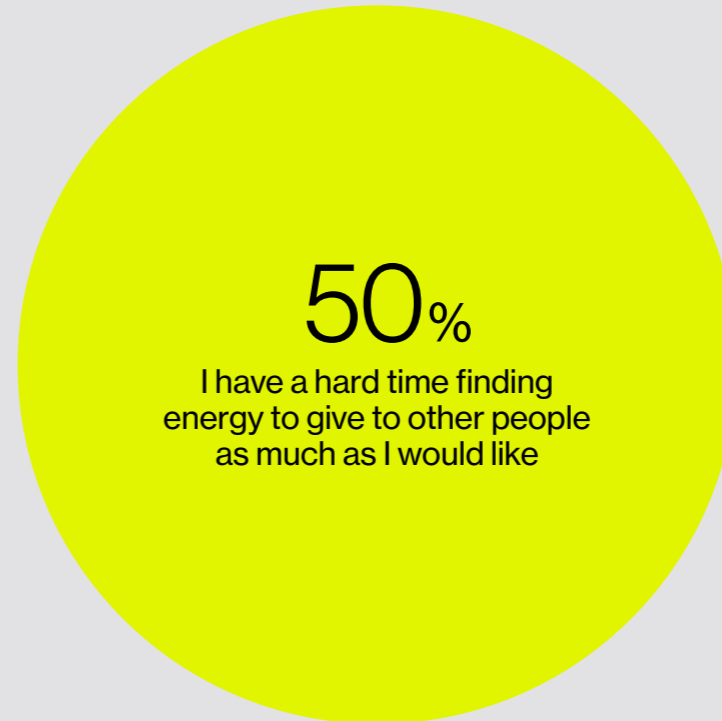
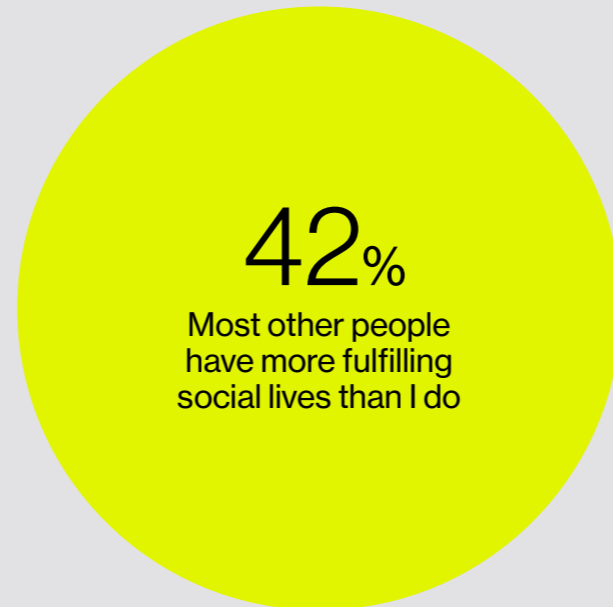
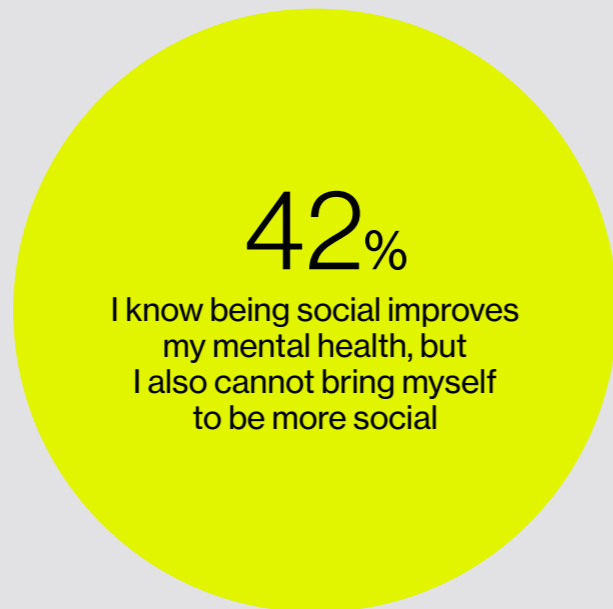
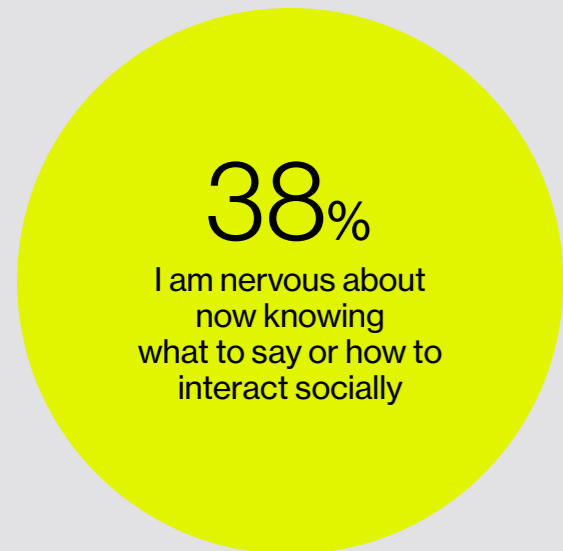
72%  
of millennials feel lonely  
at least sometimes

## The younger, the lonelier.

Social emptiness is a concern for all Canadians, but the younger generations of adults, generation Z and millennials, are feeling it the most. They're experiencing the impact of almost every factor contributing to the rise in loneliness, and despite young Canadians trying to project full and fulfilling social lives, they are often living very lonely lives.

# It's not easy being me.

In the grip of loneliness, gen Z and millennials need help seeing a way out. Gone are the days of childhood, when they felt confident enough to make new best friends on a neighbourhood swing set. Echoing the common where-does-anyone-go-to-meet-people-these-days refrain and held back by social anxiety, they don't feel equipped to improve their social lives on their own.



# FaceTime should not replace face-to-face time.

Generation Z and millennial Canadians, who were raised on social media, are concerned that trying to satisfy their social needs online is an easy, in-the-moment crutch that is holding them back from real, long-term solutions and fulfilling relationships. They know that social media might be able to keep the memories of the party going, but it can't replace the party in the first place—and yet they are still stuck in these online habits that they know aren't helping them.



You don't feed yourself by being alone within four walls. TV, the so-called social media, the internet cannot fulfill this function.

—Julien, Gen Z, Quebec

52%

Screens or devices are used as crutches to avoid social interactions

43%

Dating apps have become the norm, but I do not find them fulfilling

34%

Living life primarily through screens has made me awkward in person

# Come together, right now.

People also see social divisions as contributing to loneliness. In last year's edition of The HumanKind™ Study, we reported that 53% of Canadians believe Canada is becoming more like the United States, with increased divisions, inequality, intolerance, and violence. They want the volatility surrounding different opinions to stop holding us back. To stop blocking us from connecting with each other and from the cooperation needed to solve our country's biggest challenges.

61%


Divisions within  
Canada are increasing

59%

Intolerance of other  
people and their  
views is increasing

55%

Inequality within  
Canada is increasing



I think companies or brands can do  
so much to help with loneliness.

—Carla, Millennial, Atlantic

The Way Forward →

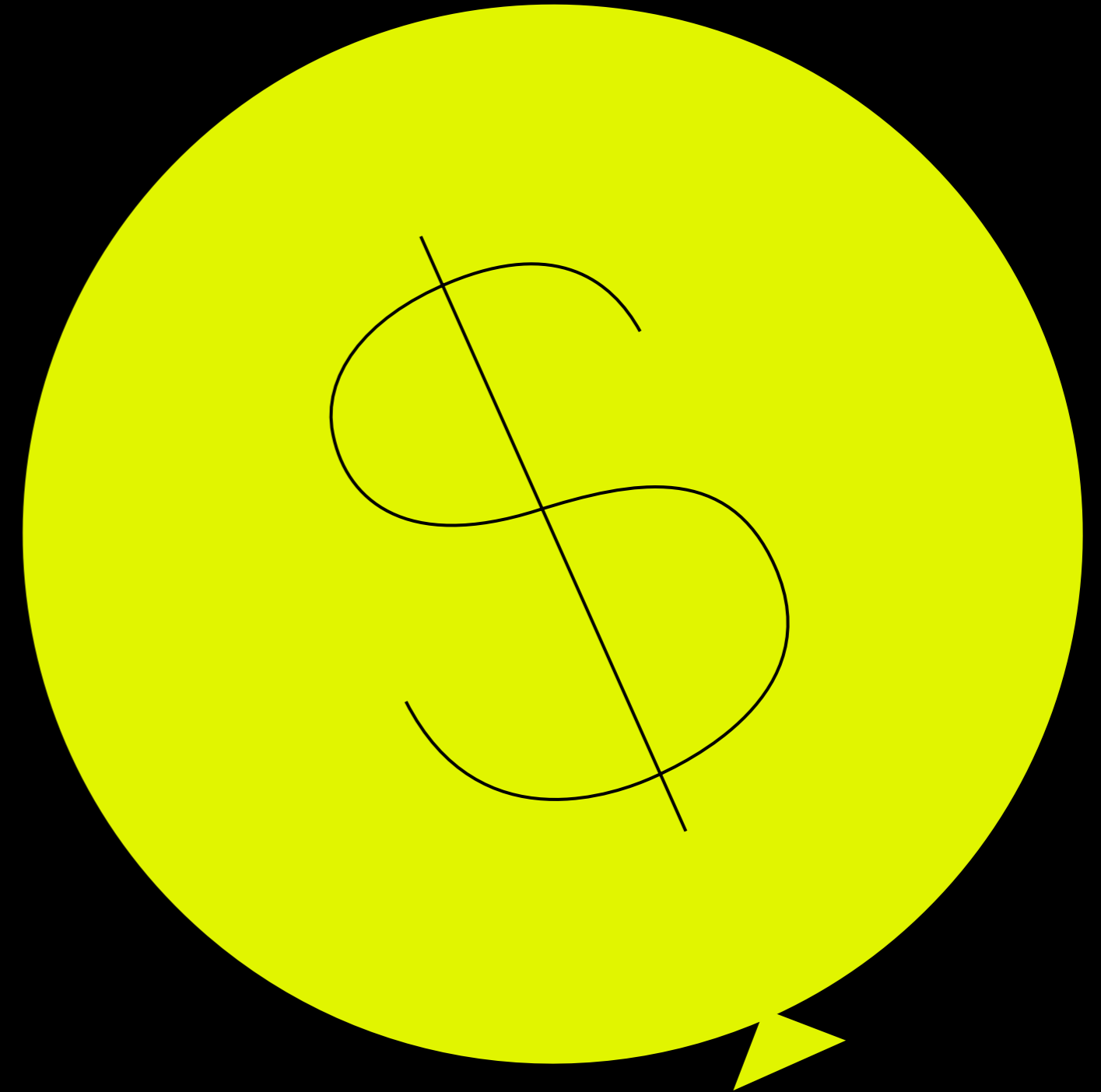
# Brands can build the playgrounds.

Canadians see many roles for brands when it comes to loneliness. Brands are facilitators of communities, spaces, and experiences, and Canadians believe that brands should use their power to bring people together.

**1 Bring people together, literally**  
This can be through in-person events, online forums, or the creation of subcultures based on shared values, interests, or hobbies.

**2 Innovate for the people**  
Develop products or services that combat loneliness, prioritize product features that encourage social connection, or reimagine physical spaces to bring people together in new ways.

**3 Don't shy away from loneliness**  
Brands have the permission and the platforms to raise awareness of one of Canada's most stigmatized issues—loneliness—and can bring people together through the power of storytelling.



Inflated Prices;  
Deflated People

# The bear (market) is loose, and people are on edge.

With no shortage of talk about inflations and recessions, we all know by now that the immediacy of people's financial needs are being felt every day. Concerns that started out as not saving enough for retirement have shifted to not having enough for today. Despite all the daydreaming and memes sent to group chats, not all Canadians can run away and start a country farming collective or manifest a low-effort, high-return side hustle.

For more and more Canadians, the cost of living has made their lives precarious like never before. Discussions of a technical recession, soft landing, or something else entirely feel like quibbling to the average Canadian. The financial free fall that was anticipated throughout the pandemic has finally come to fruition, and the financial pain of it all is causing daily stress for Canadians, who are urgently trying to regain their lives, juggle responsibilities, and swim upstream in a system that feels increasingly rigged against them.

# 45%

I'll never be financially secure or confident again


# 45%

One financial setback could have major consequences in my life over the next year

# 34%

Financially, I'm hanging on by the skin of my teeth





## Canadians want to thrive, not just survive.

One third of Canadians say they're barely surviving, not thriving. They are working hard, but they feel a frustrating lack of control and agency to better their lives and their communities and to reach their goals. Canadians don't want to feel alone in their fight.



I am teetering on a rope bridge and fearful of falling deeper into debt.  
—Felicity, Gen X, Ontario

# Inflation is bursting our bubbles.

As prices keep inflating, people are starting to deflate themselves. They are deflating their wants, their needs, and their expectations. They're not buying the good cheese. They're skipping a meal. They're turning down the thermostat. They're staying home... again. Compromise is everywhere.

Changing habits is the new normal, and regardless of where people fall on the financial scale, it's tough to swallow. It also takes a lot of effort from people who are already burned out. Old habits mean easy, mindless decisions. Behaving differently takes work. And sometimes, all that work doesn't seem to make much of a difference.

42%

I'm so focused on making ends meet today that it is nearly impossible to save money for the future

42%

I'm choosing cheaper, less healthy food to save money on groceries

47%

I'm spending so much money on essential items that I have very little left to spend on things and experiences that bring me joy

“

I feel the financial pinch the most when I want to go places and experience things with people. I often feel like I'm missing out on socializing.

—Cameron, Gen Z, Ontario

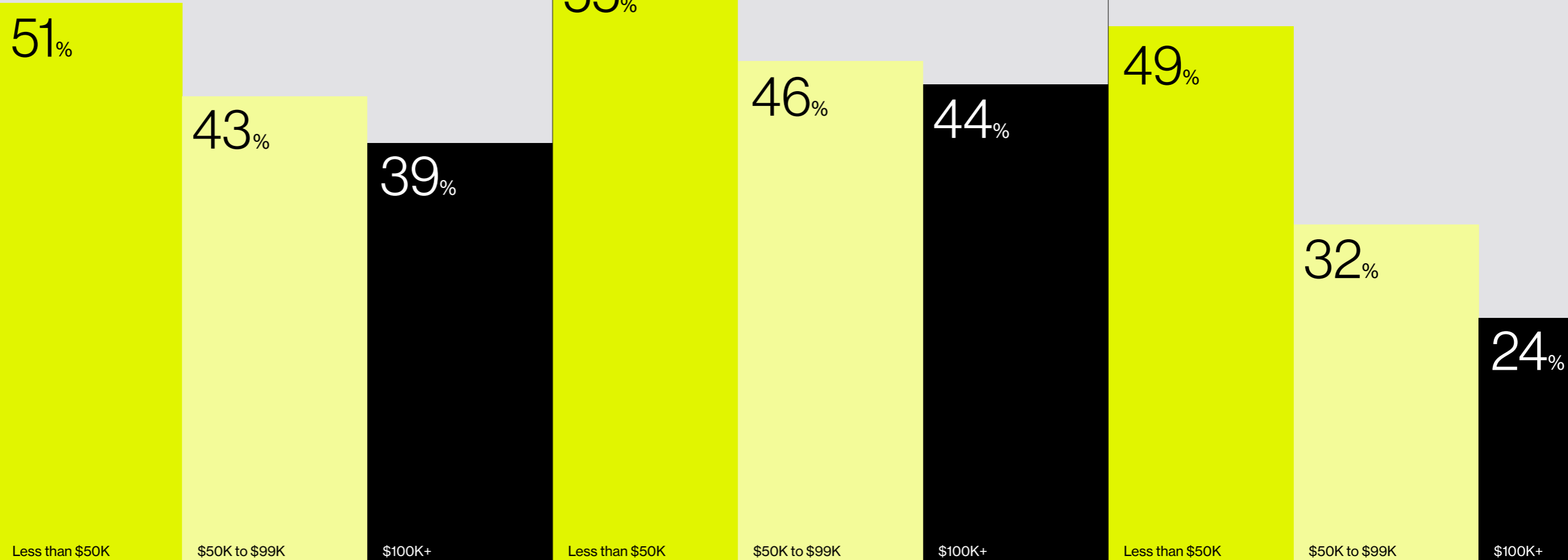
Emotionally, I'm overwhelmed. Like, what am I going to do? Am I going to lose my house in three, four years, or in one year? I'm rushing around to have enough money to pay. It's a big unknown for me.

—Marie-Hélène, Gen X, Quebec, HHI \$110K to \$150K

I'll never be financially secure or confident again

I'm spending so much money on essential items that I have very little left to spend on things and experiences that bring me joy

Financially, I'm hanging on by the skin of my teeth



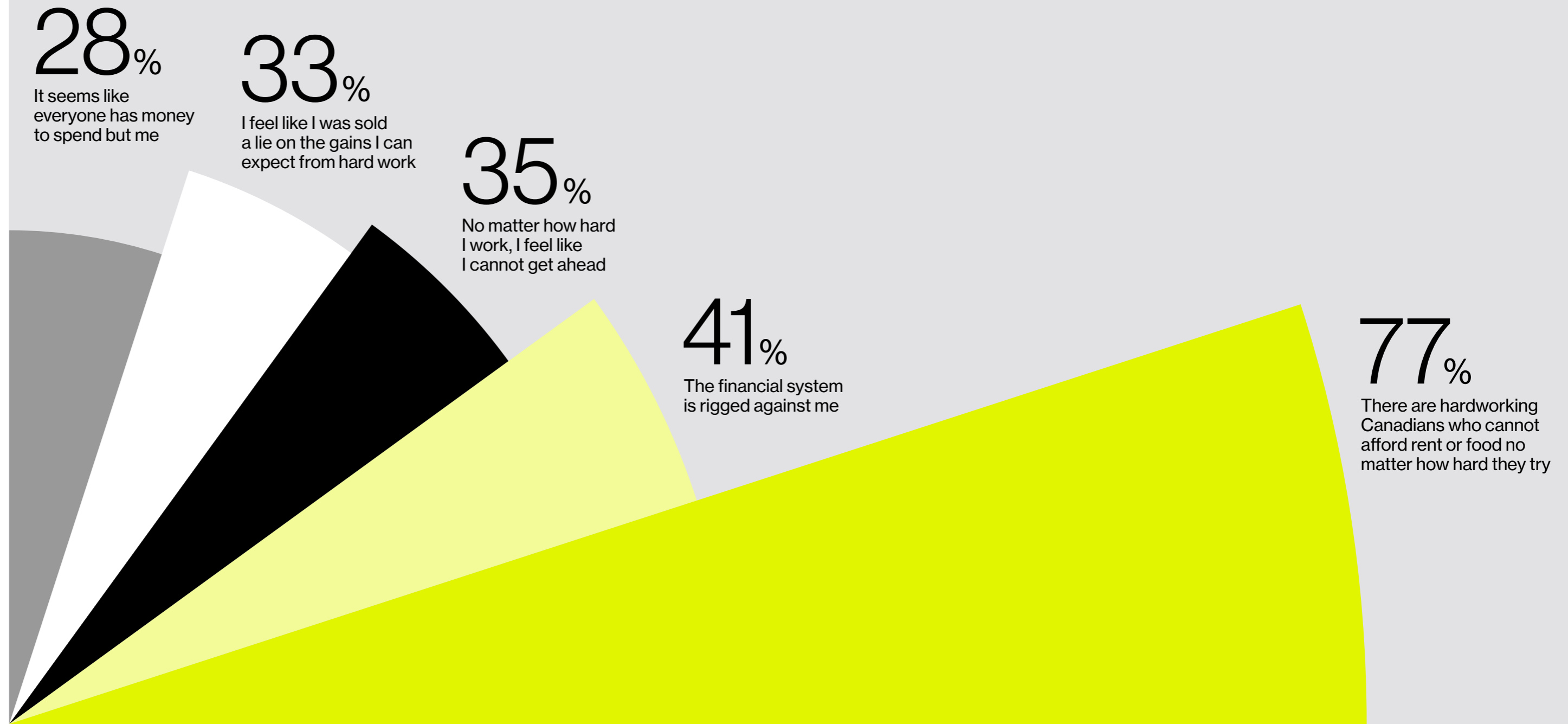
Lowest income earners are most vulnerable, but others are not immune.

Undoubtedly, the most vulnerable Canadians are experiencing the most financial stress. However, financial strain is also felt across the income spectrum as everyone tries to maintain stability while juggling financial commitments.

# The sting of failure.

There is an innate drive to feel successful that propels people to flourish, be the best they can be, and reach their potential. They want to feel good about themselves through a sense of accomplishment and feel their positive impact on the world. Meeting their financial goals is obviously a key way that many Canadians measure that success. Putting food on the table, sending the kids to camp, hosting a party, fixing the leak in the roof, buying the bigger TV. Not meeting expectations and hitting markers of doing well feel like very personal failures.

Financial cutbacks do not just separate us from stuff we want to buy; they can also separate us from our sense of self-worth. Many Canadians are feeling put down by financial failures, disappointed that they aren't achieving the standards they've set for themselves. They can recalibrate their self-esteem over time, but right now that future feels distant. Especially because many Canadians believe that the system is set up against them, meaning that their hard work won't be enough to turn their lives around, even though they want to.



# Canadians want to move together instead of apart.

Canadians are acutely aware that financial fractures are causing social fractures and are sick of feeling powerless to fix them. They feel powerless about their own finances keeping them stuck at home and also about fellow Canadians falling behind them. They see the ground falling out from under people's feet and are not able to reach out their hands to help. After being kept apart during the pandemic, people want to dance forward together into a better era, but instead, in many ways, it feels like they're skipping right to the end of the roaring twenties.

**72%**  
The divide between rich and poor is becoming too wide in Canada

**44%**  
My loved ones are financially vulnerable

**30%**  
I feel helpless to help many of the people I care about

**57%**  
Increasing inequality is causing tension within communities

“

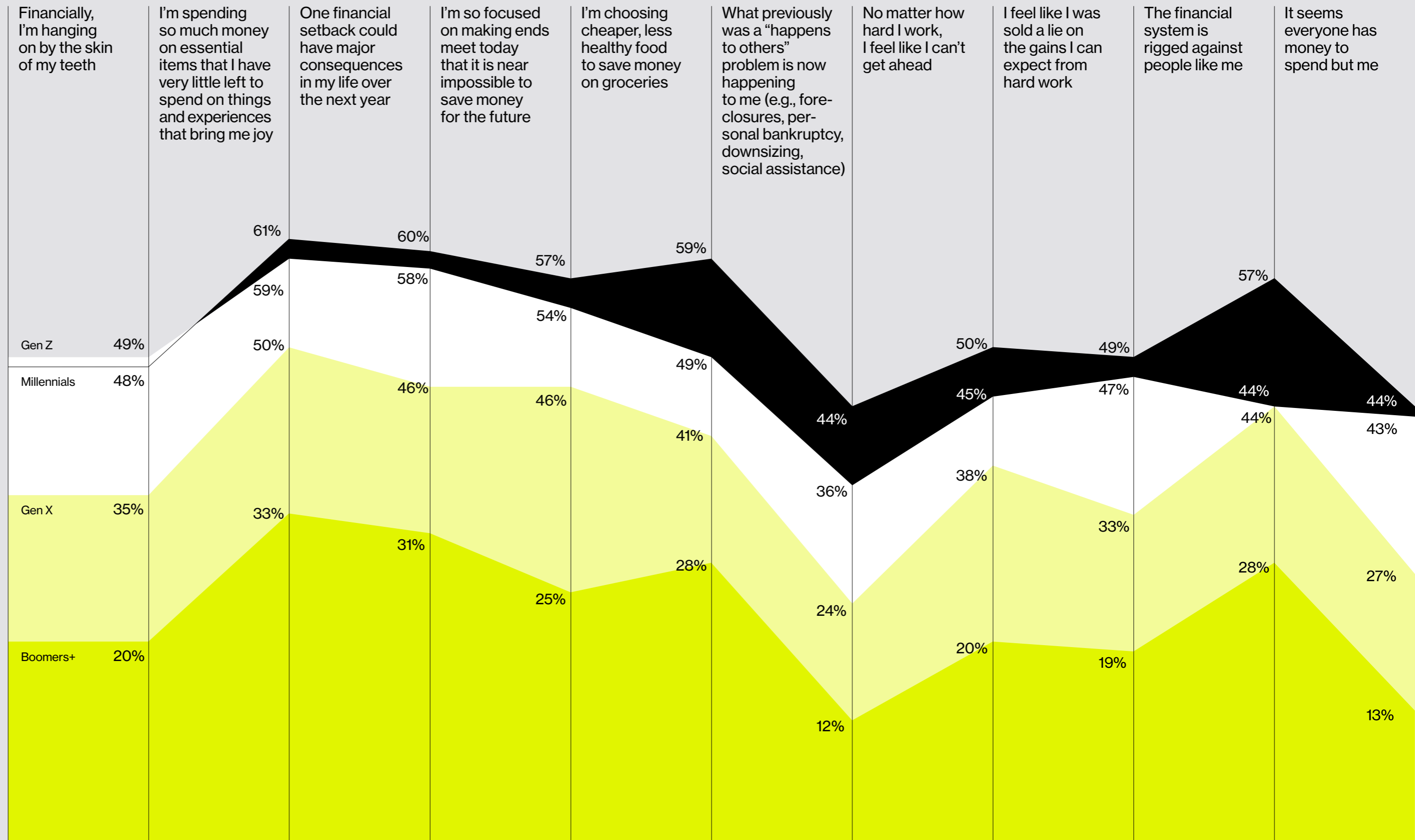
There is an inflationary tidal wave that is drowning people and I feel sorry for those people who have even less than I do.

—Matthew, Millennial, West

# Millennials and gen Z feel the biggest struggle.

The financial strain is felt the most by the I-feel-like-I'm-supposed-to-have-gotten-my-life-together-by-now age group. Already discussed in this chapter are financial concerns for the general population. When those financial concerns are examined by age, gen Z and millennials are reporting an average of 147% (up to 267%) more concerns about personal financial strain than Canadians aged 55+. Many younger Canadians are feeling a financial precarity and vulnerability like they never thought they would. They are more than twice as likely as boomers to say they are hanging on by the skin of their teeth and to report concerns about major financial downturns (e.g., foreclosures, bankruptcy).

For many young Canadians, the system feels rigged against them. Gen Z and millennials are feeling burned out with financial expectations not matching reality. Responsibilities keep piling up and financial stability seems perpetually, and even systemically, out of reach. They don't want to feel left out anymore.



73%

Wealthy companies and individuals are making excessive profits under the guise of inflation

64%

Billionaire business leaders are shaping the direction of society

## The unfair market.

Many Canadians appreciate and support the need and responsibility of businesses to make profits. They do have problems when they perceive excess greed and profiteering with painful disregard for who is getting stepped on. Canadians talk about how scarcity is a lie, and how some people and companies are hoarding more than their fair share.



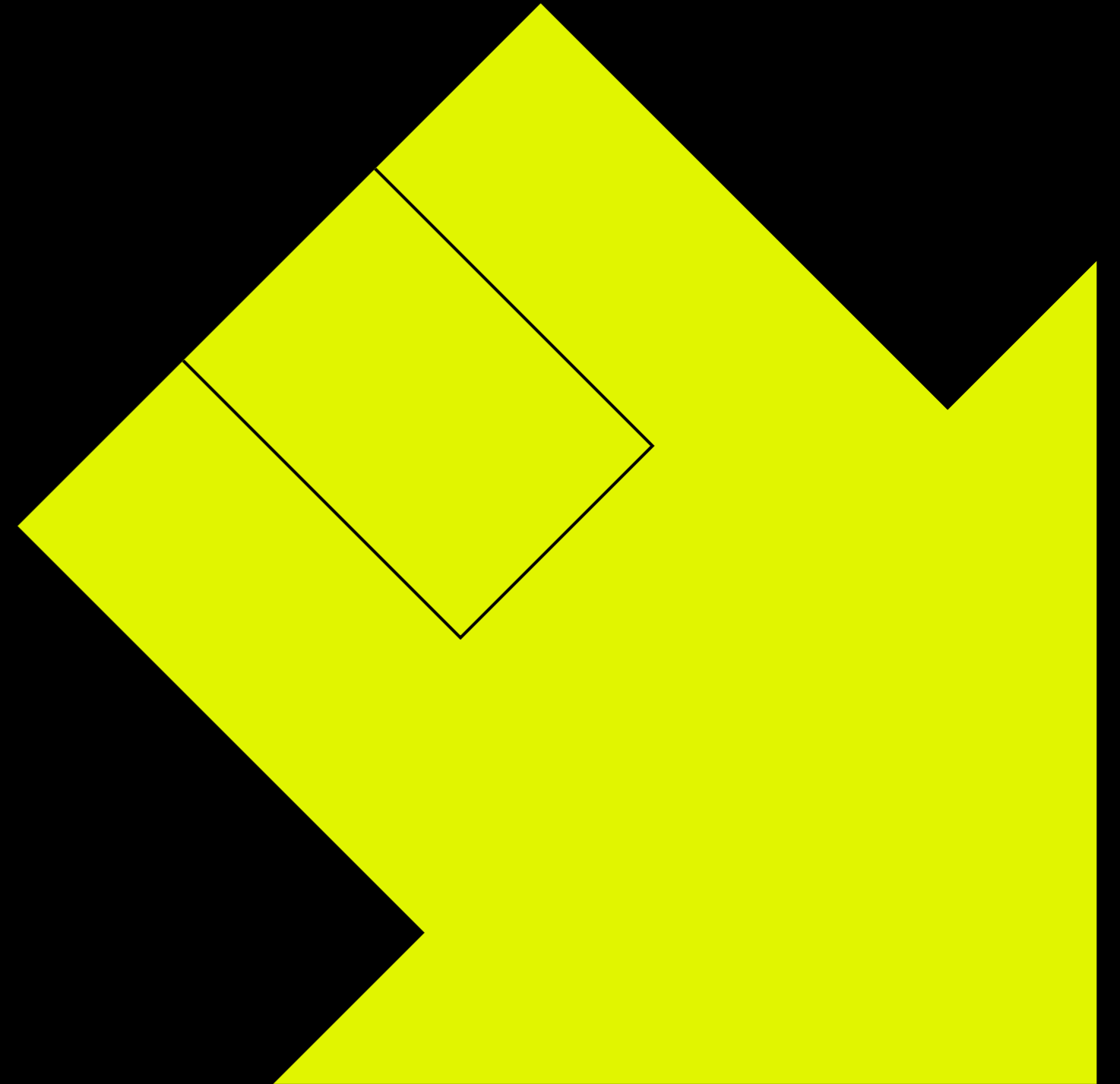
The Way Forward →

# Brands should show solidarity with Canadians.

Canadians think brands are either with them or against them, and it's up to brands to find ways to empathize and connect with Canadians in a way that demonstrates solidarity.

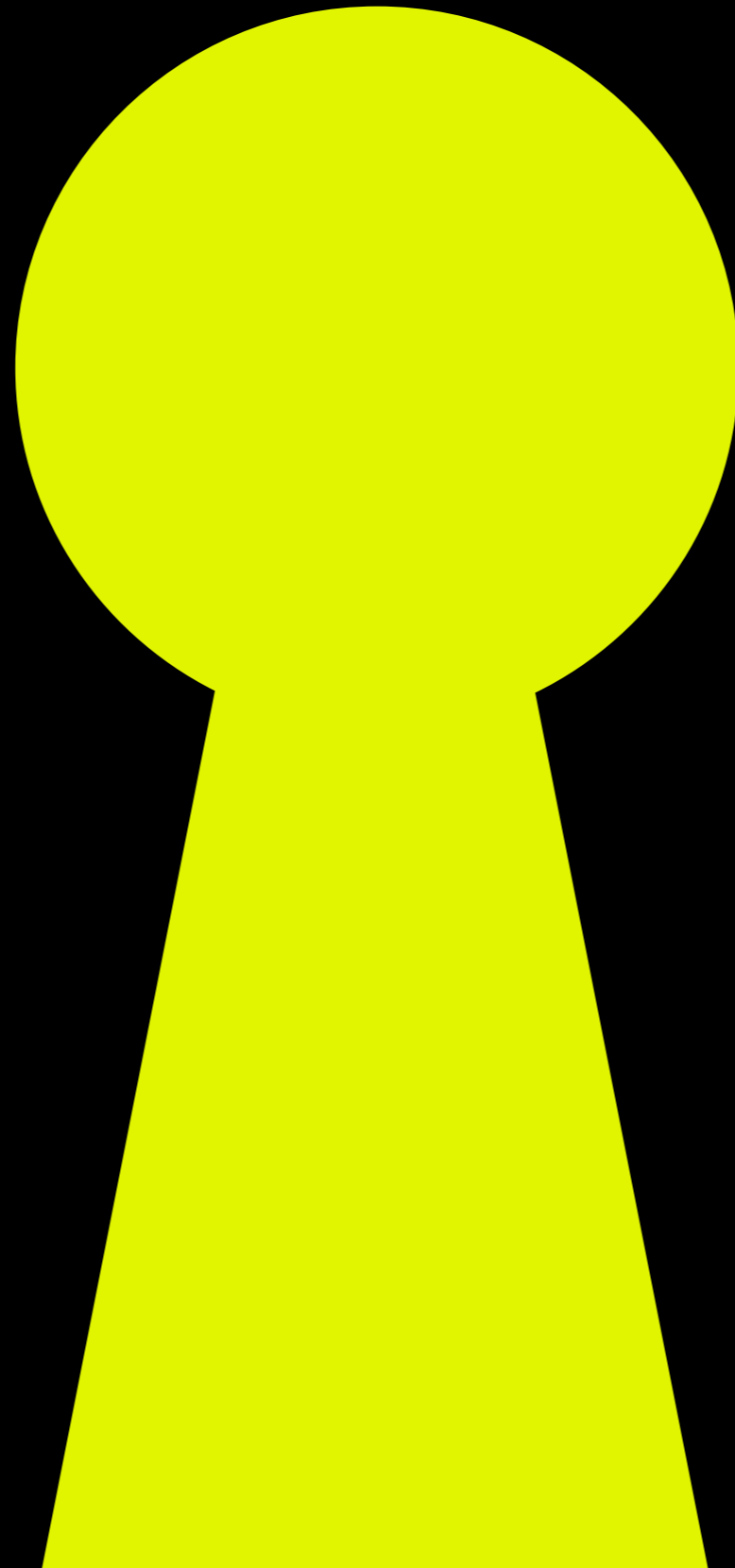
- 1 Be transparent in your pricing**  
It's okay to make money; Canadians expect it, but they want to feel that the profits are reasonable, not greedy. Be open with how your prices are set, and create a new vision of what value means.
- 2 Make it simple**  
With so many decisions to make and the stakes high, Canadians are overwhelmed. Help people be confident in their purchase decisions, such as creating best value packs, subscription services, or comparison tools.
- 3 Create win-win relationships**  
The classic rewards program comes to mind first, but consumers are looking for more ways for their business to be valued (e.g., referrals, personalized discounts, gamification).

No Place Like  
No Home



# Home, sweet home.

The importance of having a refuge, somewhere to feel safe, comfortable, and relaxed, certainly became top of mind for many Canadians during the pandemic. More Canadians than ever have experienced what it's like not to feel sheltered in a storm. This feeling of vulnerability carries extra emotional and mental weight just as the housing affordability crisis is closing doors for so many Canadians. From a lack of housing to high interest rates, high rents, high prices, and more, 2024 is the year of change to the Canadian home.



My housing goal is to get a sense of calm and satisfaction from my home being set up the way I want.

—Jared, Gen X, Atlantic

# Home is (still) where the heart is.

Disappointment and, more concerning, discouragement are felt by the many Canadians who can't access housing in general or can't access housing that checks off enough of what they believe are realistic wants and needs. The specific architecture of everyone's housing ambitions may differ, but people universally share the goal of finding personal comfort. Somewhere to leave weariness at the door, lay vigilance aside, and relax in your own safe space. A chosen space for physical and mental rest and recharge. An environment with freedom for self-expression, over which we feel control and ownership. A home.

Home ownership has historically been within reach for the strong majority of Canadians and has always been touted as a part of the traditional successful life package: get married, buy a house, have kids. But as the likelihood of home ownership decreases, younger Canadians are discouraged and looking for new solutions to help them meet or adapt this milestone.

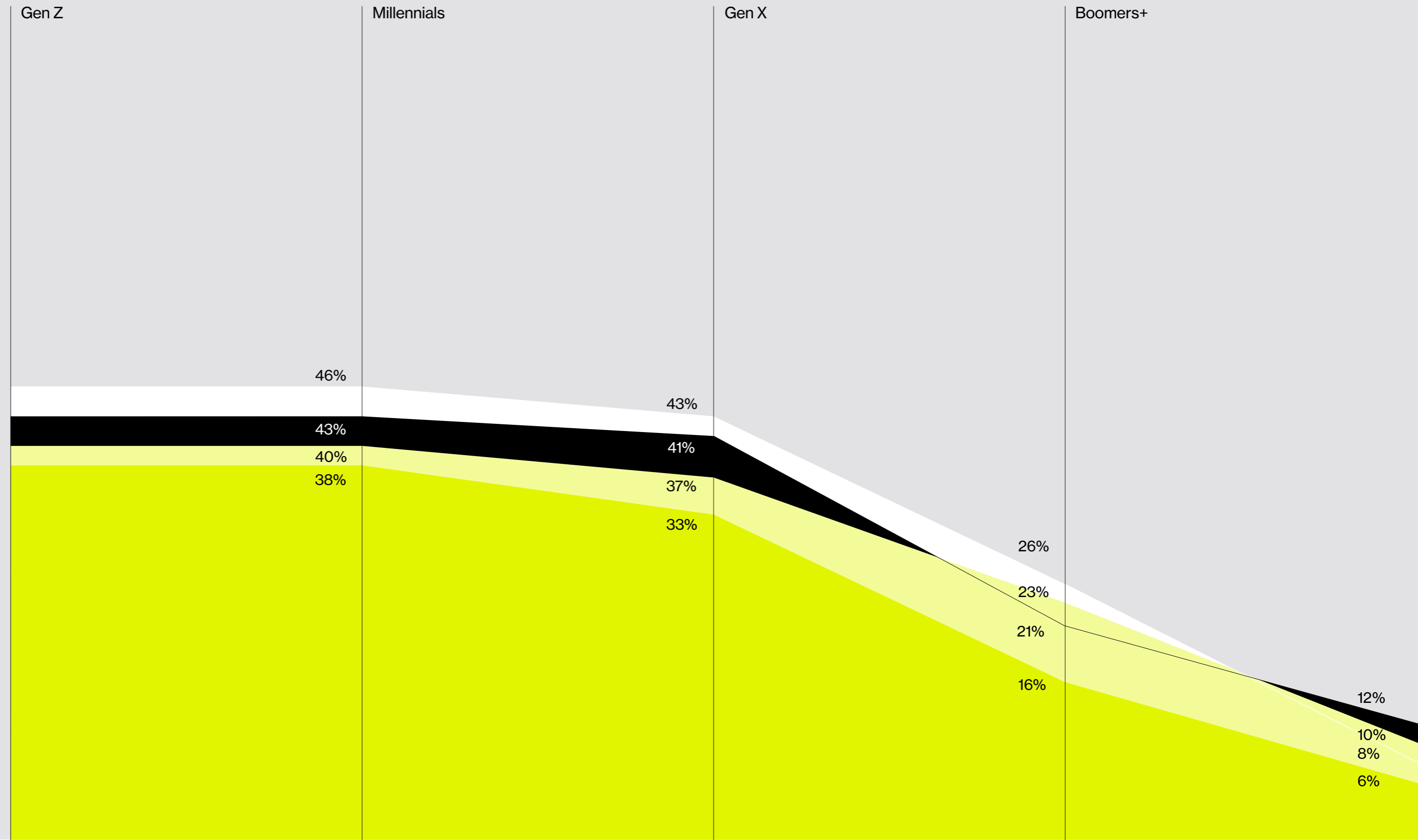
A large, bold, black graphic of the number 67% is centered on a bright yellow background. The number 6 is on the left, 7 is in the middle, and the percentage symbol % is on the right.

Concerned that for a young person to buy their first home, they need help from their family

# The traditional housing plan isn't working for young Canadians.

Younger Canadians are more likely to feel like they're still on the outside looking in, compared with their parents, who are more likely to have secured homes long ago. When asked about worries over losing their housing or never meeting their goal of owning a home, gen Z and millennials were, on average, approximately 5 times more likely than boomers to be concerned about the precariousness of their housing.

- I've given up the dream of ever owning a home
- The threat of losing my home feels more real than ever before
- I've given up almost everything to afford my home
- I might lose my home because of rising interest rates



To save money, I might have to move away from friends and family

45%  
Gen Z

44%  
Millennials

## Location, loneliness, location.

A major housing concern, particularly for younger Canadians is that if or when they move, it will need to be to an all-new area, far away from friends and family and the communities they know and cherish. This big move will mean big life changes, and they feel left on their own to navigate it all. People in cities are 43% more likely to share this concern than their rural counterparts.

The prospect of being forced to move away from one's community is also contributing to the loneliness epidemic. As we've already reported, the rates of Canadian loneliness are staggering, and putting kilometres between relationships certainly isn't going to help. Moving to an all-new area creates a host of issues. New people, routes, grocery stores, coffee shops, schools, daycares, sports leagues, and doctors (a feat on its own). While choosing to move can be a fun adventure, being forced to move makes sustaining social connections even harder.

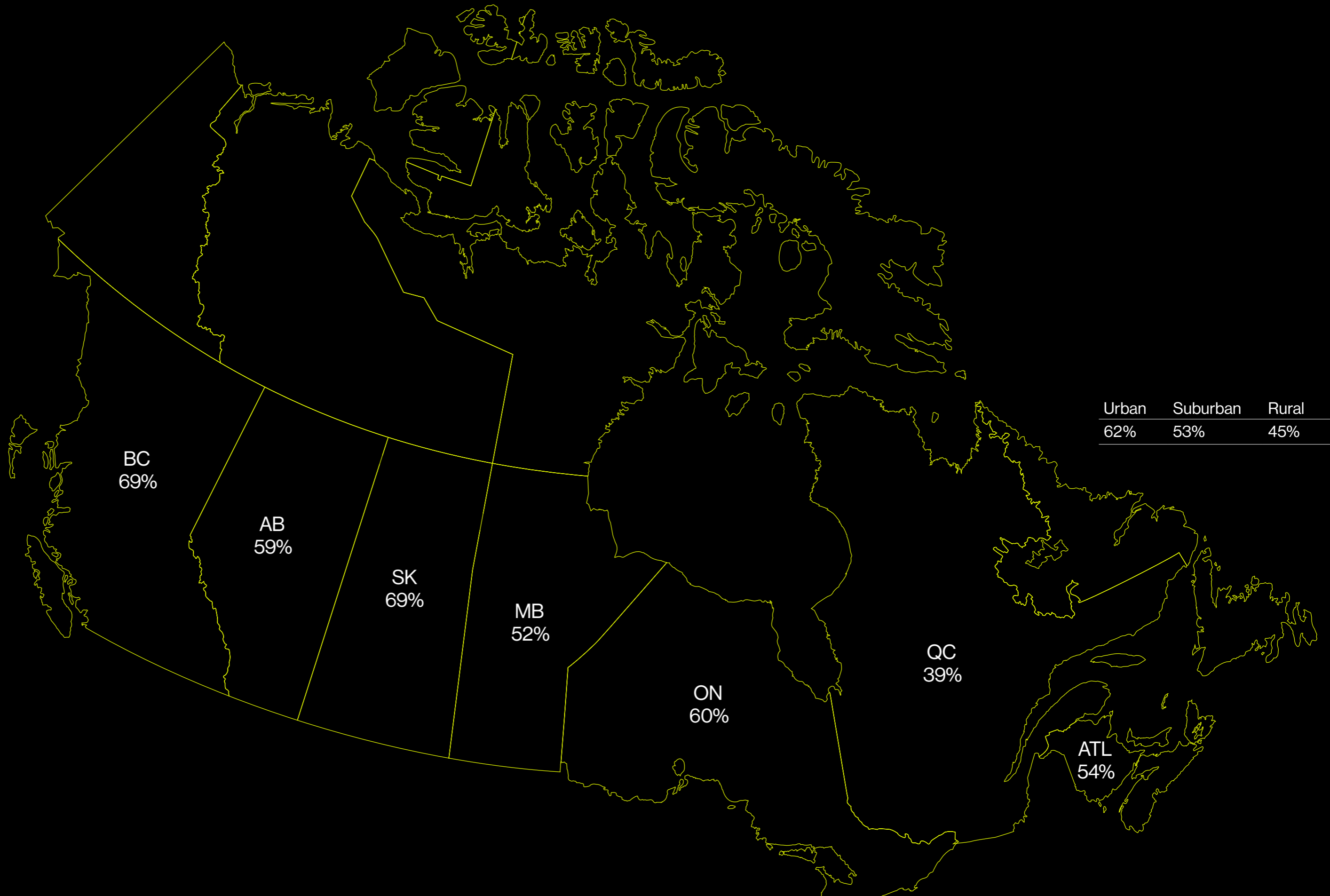


I want to stay in my city so that I am close to my family and friends.  
—Emma, Gen Z, Ontario

# The crisis in the housing crisis: homelessness.

When exploring concerns of Canadians, many brought up the increasing number of unsheltered and unhoused populations in their communities. The most standout research finding is that this is not an issue that affects just the central cities or the most populated provinces. Homelessness is a concern across Canada, and Canadians feel like no one is doing anything to help.

**56%**  
I am concerned about the rise in homelessness in my community (nationwide)



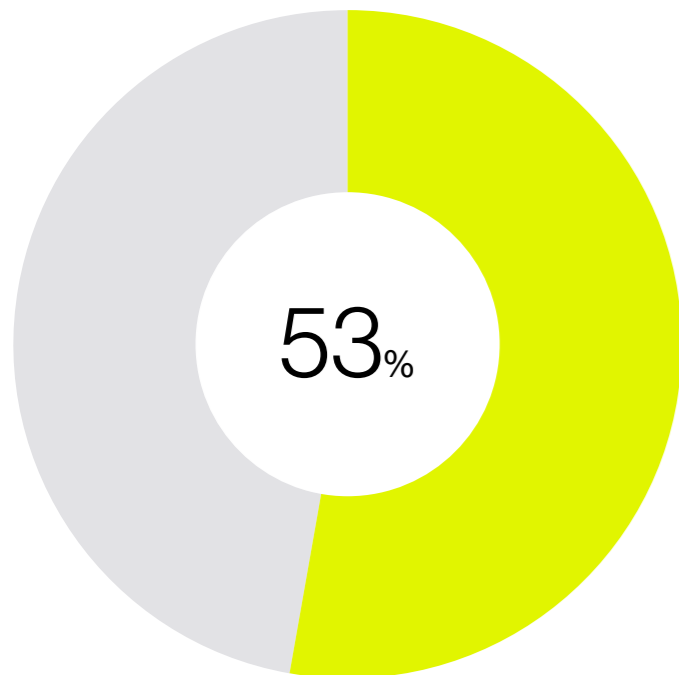


# Reflections on homelessness.

## No Canadians left behind

Worry, sadness, and empathy abound for the health, safety, and dignity of fellow Canadians being failed by a system that is supposed to take better care of them. 51% of Canadians are concerned that the stigma around homelessness keeps people living in a cycle of poverty.

Nobody is doing anything about homelessness in Canada

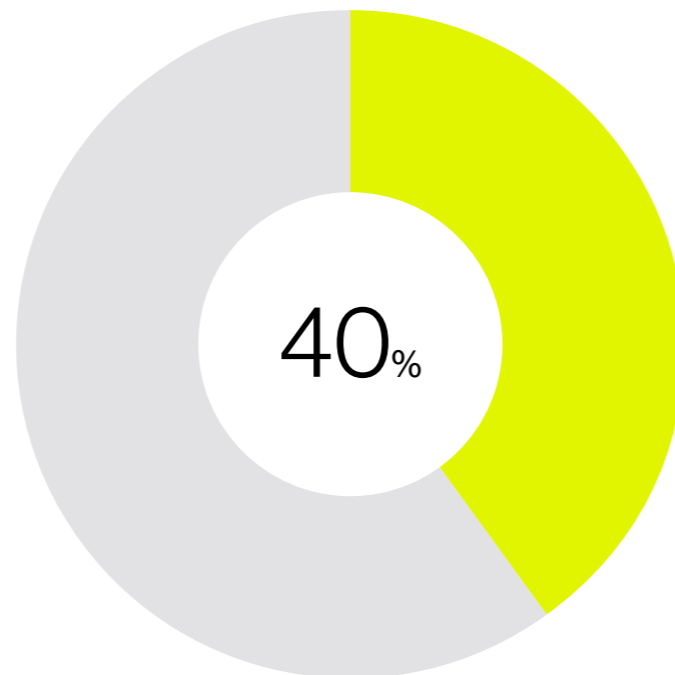


“ It’s devastating. You see the amount of people that can’t keep up with the rise of things and are losing their homes, can’t make rent. In my city, the amount of people in the tent cities keeps on growing... Seeing people in that situation, it’s just emotionally draining and sad...  
—Gabriel, Gen Z, West

## Fears of desperate behaviours

Many Canadians want to care for and respect vulnerable individuals, but some confess that they can’t escape feeling threats to their personal safety and property security from some who, with little other choice, will resort to anti-social and unhealthy behaviours to survive each day. This concern is stronger in urban and suburban areas (43%) compared with rural areas (25%).

Homelessness in my community makes me feel unsafe

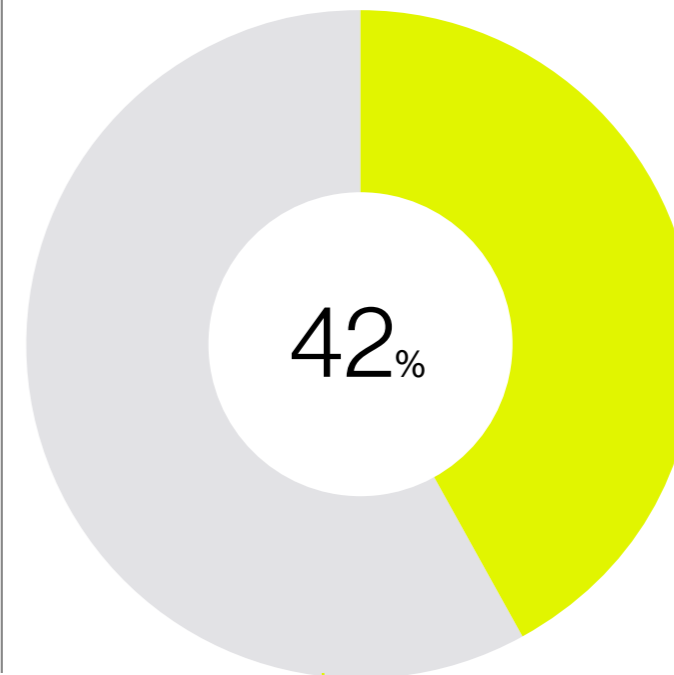


“ While I feel awful for people in these circumstances, it is a little unsettling because I am afraid that people who have no resources may turn to crime if they have no other choice. I know that is not always the case...but I will be honest—I am fearful when people have nowhere else to turn.  
—Carla, Millennial, Atlantic

## It could be me

This research revealed that many people are starting to identify more similarities between themselves and homeless people in their communities. Unhoused populations were previously seen as a very different group of people from the rest of the community, but now the perceived differences between “us” and “them” are shrinking. This is particularly true for younger generations, who are highly concerned about their own housing instability.

When I see homeless people, I feel scared that could end up being me or someone I care about



“ The age of homeless people seem to be younger, which is very concerning as a young person myself. It makes me think about what could’ve happened to put them in this situation in the short amount of time they’ve been alive and makes me put myself in their shoes.  
—Emma, Gen Z, Ontario

I think every brand can play a role in helping with the housing crisis. Brands that already give back to the community in their strategic planning are best suited to walk the talk. They can engage with the communities and work with other stakeholders to identify cooperative efforts to better help the situation.

—Matthew, Millennial, Ontario

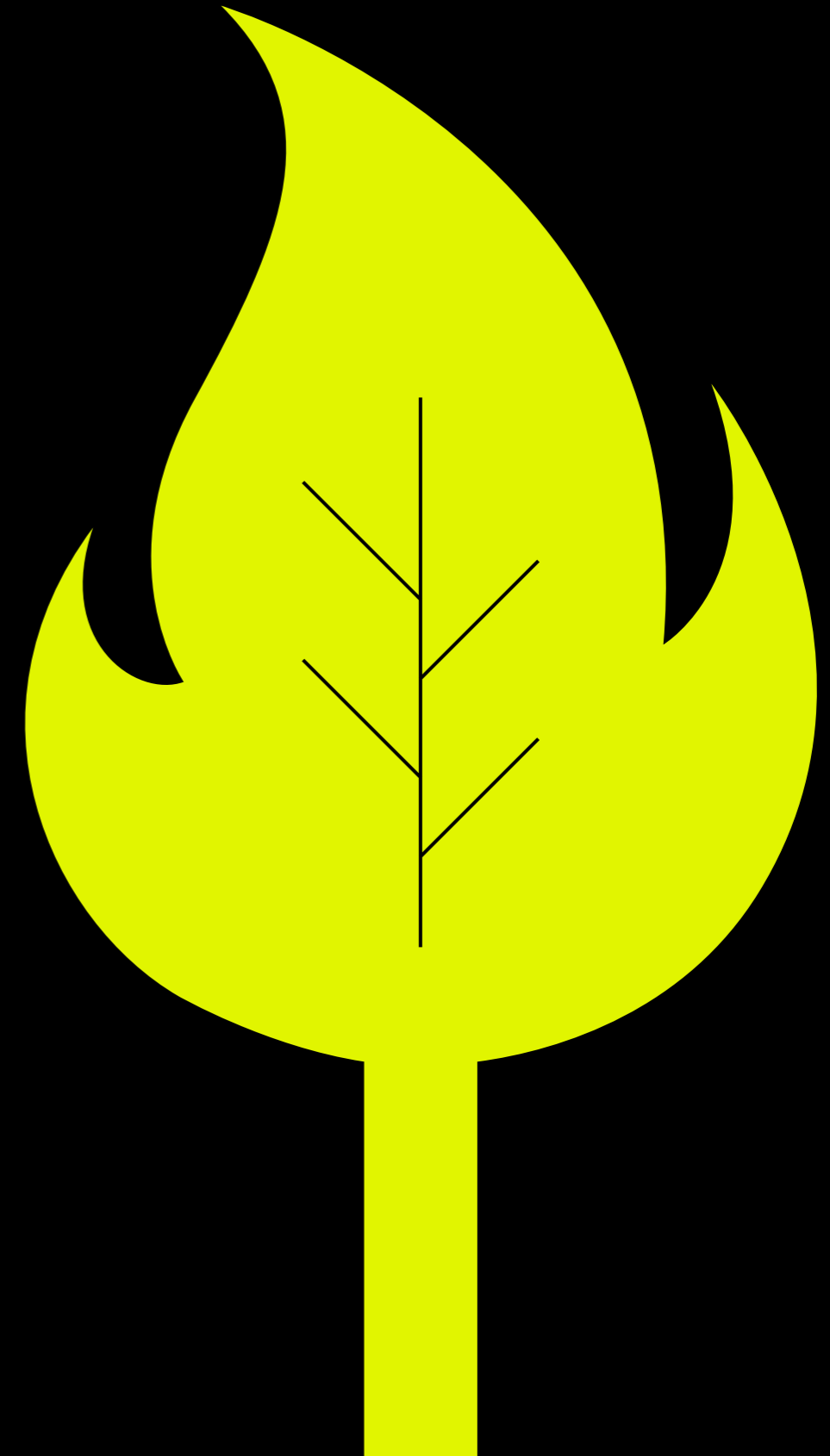
The Way Forward →

# Housing is everyone's problem, even brands'.

Brands didn't cause the housing problem, and they aren't responsible for fully solving it, but Canadians still believe brands—as members of the communities they serve—should play an important role in solving the problems created by the housing crisis.

- 1 You don't need to build houses**  
There are a lot of other things that brands can do, and they should focus on things that make the most sense for them, building from the brand purpose out (e.g., brand acts, advocacy, workplace housing).
- 2 It's about more than a roof**  
A home is more than a roof over someone's head; it's security, identity, dignity, and reprieve, which can be provided in ways other than a building (e.g., community programs, employment opportunities).
- 3 Invest where communities need it most**  
Canadians see a brand investing in community as a brand that should be investing in housing. Assess your investment strategy to make sure that the money follows the needs of Canadians.

# Climate Has Changed



# Present and pressing.

The climate change future is here. After the extreme weather events of the past year arrived at their doorsteps, Canadians who used to think of climate change as a future problem are updating their thinking to greater urgency.

Let's face it, enjoyable outdoor days in Canada are limited. So it was certainly noticeable this year when outdoor events were cancelled, and tens of millions of people were forced indoors because of burning orange skies and unbreathable air. These fires, floods, and extreme weather are tangible issues for the many Canadians suffering real losses, making the climate change warnings feel more present than ever before. The future of climate change is...now, and Canadians are urgently looking for better solutions.



of Canadians report being personally affected by climate-change-related extreme weather events in the past year



We've all heard about climate change before, but I feel this year is the first time it seems like it can reach out and touch me directly.

—Felix, Millennial, Quebec

# Generations lining up together on climate change concerns.

Canadians of different ages may have different perspectives on some things, but they come together united in their concern for the future of the planet and their frustration with the lack of climate solutions.



You can see the climate changing in front of you. Really, if you'd asked me a year ago, I never would've been concerned about that, but it's very top of mind when you look across Canada the last three months, what's been happening is unprecedented.  
—Kathleen, Boomer, Atlantic

Not enough progress is being made to slow climate change. There is evidence to prove that fact. The sea levels are continuing to rise, the earth is getting hotter, there are many more extreme weather events. We can even feel the effects of climate change just by going outside.  
—Emily, Gen Z, Ontario

Despite science and fact-based warnings regarding the environment, we are destined to continue repeating the same mistakes until our eventual demise

56%  
Gen Z

53%  
Millennials

53%  
Gen X

58%  
Boomers+

I often hear that it's too late and we have gone too far. I don't want to lose hope...I think it's in our control.

—Carla, Millennial, Atlantic

Are concerned the Earth  
is past the point of saving

61%  
2023

## Giving up on giving up.

With climate change thundering for attention, Canadians aren't resigned to taking it lying down just yet. Many are revved up to save their homes and families and are looking for leadership on real solutions. We see this in our most recent data, as significantly fewer Canadians feel the Earth is past the point of saving compared with just a year ago. Hope is alive and well.

38%  
2024



48%

Climate change is completely out of my control as an individual (vs. 37% boomers+)

47%

The things I do to help the environment are so small that they won't have an impact (vs. 29% boomers+)

34%

It is hard to see past my immediate need or desire to make more sustainable choices (vs. 20% boomers+)

# Younger Canadians are more distraught over personal sustainability failures.

Gen Z and millennials feel more pained than older Canadians about the gap between their sustainability goals and their day-to-day realities. They are more concerned than older generations about the limited positive impact they feel personally capable of achieving.

Gen Z and millennials are more than twice as likely to feel guilty about non-environmentally friendly purchases than boomers (41% compared with 19%).

# Canadians long for climate leadership.

Global temperatures aren't the only things getting hotter. Frustration is boiling over for Canadians on what is seen as a lack of willingness to make meaningful progress toward sustainability goals. Countries make international deals and then back out of them. Governments fail to wrangle corporations into sustainable practices. Brands greenwash and fail to provide solutions. Costs get passed on to consumers. Canadians want solutions but are demoralized. They feel like they are being asked to bail out a boat with a spoon while big polluters are filling it up with a hose.

# 68%

Corporations don't care about the environment; they care only about money

# 67%

Companies are more focused on performative acts, such as replacing plastic straws, than changing to help the environment

# 58%

Society is too complacent about climate change and what needs to be done to stop it



We do our share, and there are companies that don't do theirs. I think that brands need to be transparent about what they're doing to mitigate their climate impacts. The public are aware and tired of vague green-washing efforts.  
—Peter, Gen X, Atlantic

# The path to sustainability needs some mowing.

The overwhelming majority of Canadians regularly tout that they want to live sustainably, yet sustainable products, initiatives, and policies fall short when it comes to consumer adoption. The front-line explanation behind this intention-action gap is not new, yet it persists: adopting the new sustainable option is usually harder than following the older, more familiar path. The immediate costs of sustainable choices can be more present and salient than the gains.

Sustainable-behaviour choices can feel like vague, expensive, drops in the bucket, with no sense of satisfaction from tangible feedback on meaningful progress. These choices understandably end up losing the at-the-point-of-decision battle to more concrete, economical, present-day gains, such as lower costs, lower mental effort, and more convenience. Which path is easier? A product you hope is some degree better for the environment or a product that saves you effort and money today? Consumers are gliding down the paved option.

People are tired and they need easy, affordable ways to support climate change. When the best thing to do to help the environment takes more effort or is more costly, it creates a barrier for people to do it.

—Kirsten, Millennial, Atlantic

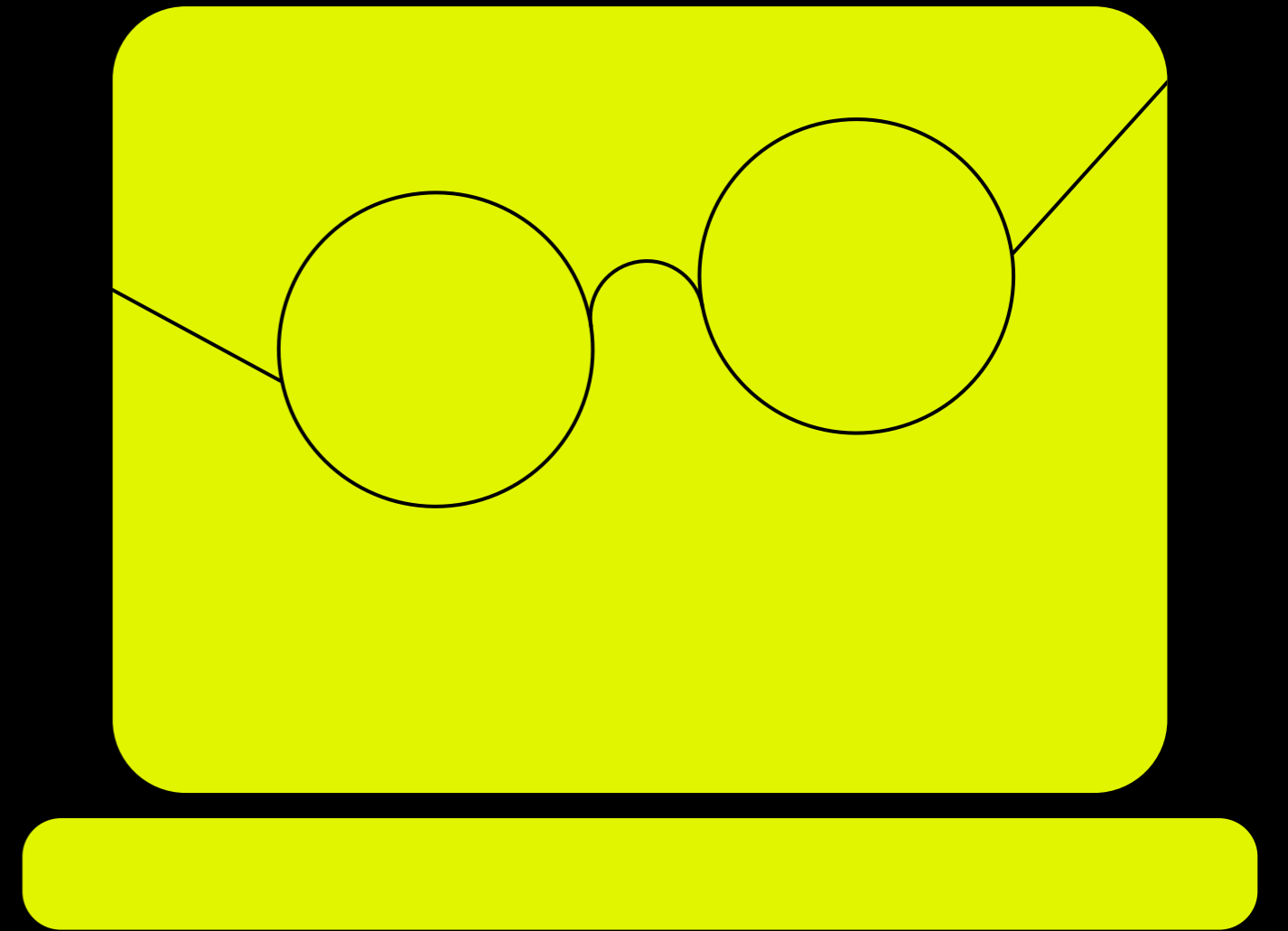
The Way Forward →

# Brands are essential in the climate change equation.

Climate change is negatively impacting everyone, and Canadians across generations agree that action needs to be taken. They see brands as an important part of the solution.

- 1 Do your part**  
Brands are seen as big contributors to climate change that pass the buck to consumers. Canadians want to see brands do more, such as reducing waste, minimizing packaging, or limiting pollution.
- 2 Take exclusivity out of the equation**  
Canadians often want to make better choices but feel priced out. Cracking the environmental-value code is key to helping more people make better choices more often.
- 3 Use your power**  
Brands can influence behaviour up and down the value chain, and Canadians see them as key players in the fight against climate change. Using a brand's economic power is an untapped opportunity for many.

# AI: Help or HAL?



# Not all-in on artificial intelligence.

“

Is AI going to be used ethically? Our population is growing and our economy is going to require fewer people. So, what are we going to do? There are many ways AI can be misused.

—Sophie, Gen X, Quebec

“

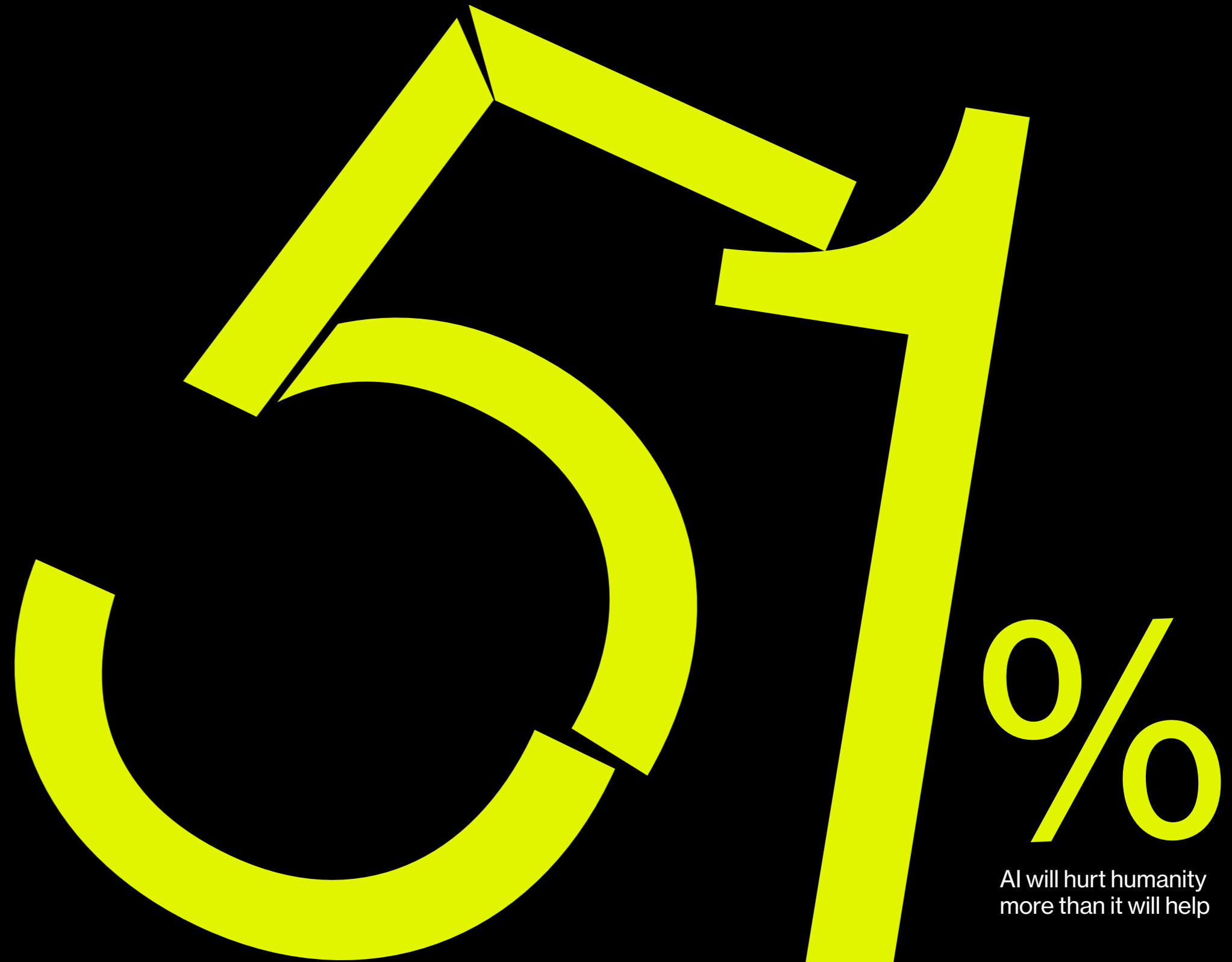
I worry about the misuse of AI. There is a lot of concern from prominent tech developers about the misuse of AI.

—Tessa, Gen X, Ontario

“

I have seen AI mimic someone's voice. I think that it can be a cool way to hear a song in a different singer's voice, but I also think it can be dangerous if used on a politician making an inappropriate comment. I am unsure how to feel about it.

—Emma, Gen Z, Ontario



# Forging ahead... too blindly?

Canadians are thinking about and interacting with AI like never before. They are having some fun in playing with new AI-powered toys—like ChatGPT and DALL·E—but also want to proceed more cautiously when it comes to meaningful adoption. They are interested in the benefits of making tedious things easier to do but witnessing stories of AI's successes and failures is leaving many Canadians unsettled, with an eerie feeling they might be living in an episode of *Black Mirror*.

Top of mind for Canadians are many concerns that are similar to the unease faced by past technological advancements, but the unique qualities of generative AI bring up all-new existential concerns. They see humanity moving toward (or arriving at) AI that can communicate and share ideas like a person does. AI that will have the power to influence people's opinions. AI that moves faster than the people who created it.

# 64%

of Canadians are concerned that AI is progressing too quickly without enough care for the risks

# 32

# 16

# 8

# 4

# 2



My thoughts have definitely changed over the years given the advancements that have been made. AI is moving at the speed of light, so it is really hard to keep up.  
—Kirsten, Millennial, Atlantic



# Not trusted to be intelligent enough.

Consumers know of many cases where AI has been used wrong, leaving them questioning the validity of AI when it comes to consequential decision-making. Biased hiring, purchase errors, hate-speech tweeting robots, sexist credit cards, false arrests, racist soap dispensers, nightmarish hand images, no lone bananas, and no shortage of infuriating customer service chatbots. Knowing that even leaders in AI development are still stumbling and scuffling along the way, Canadians are nervous that impatient organizations will get it wrong, leaving people to deal with the minor and major consequences of a flawed AI universe.

67%

Concerned that AI is making decisions without human supervision

44%

Concerned that AI is biased and negatively impacts marginalized populations



It hurts me personally ALL THE TIME when I have to interact with a chatbot who can't help me with my issue in any customer service realm.

—Carla, Millennial, Atlantic



AI learns from the internet, and the internet is a cesspool.

—Beth, Millennial, West

AI is already being used to spread disinformation...Bots all over social media are spreading false information and propaganda and AI can be used to ramp that up even further.

—Daniel, Millennial, West

# 60%

Concerned that AI is progressing to the point of influencing our opinions and perceptions of reality

# 53%

Concerned that AI could influence parts of culture or art

“

Where are you going to get your information? How do you know who to believe? That's what scares me. At some point you're going to lose reality... I think we're going to be doubtful about everything and that scares me.

—Glenn, Boomer, Quebec

## Canadians want a firmer grasp on what's real and what's not.

The pace of AI's progress may feel frenetic, but the anxiety caused by questioning what is real in nothing new. Canadians no longer see this as a futuristic science-fiction plot but as a practical concern given generative AI's ability to create deep fakes. People are worried about AI that can communicate and share ideas like a person does—but faster—and its impact on the real world. They are grappling with a not-too-distant future when AI influences how human opinions and culture are formed, and they're very concerned.

“

ChatGPT can be used to make a persuasive essay to argue in favour of one opinion versus another, which can provide facts that will influence the reader. This is powerful and can definitely be used to influence people's opinion.

—Emily, Gen Z, Ontario

# Canadians don't trust companies to self-govern responsibly.

There is very little faith that societal good will come from companies being left alone to make AI deployment decisions. Canadians want oversight for development and use, and they want companies to be transparent and responsible when it comes to AI.



I think corporations will generally use whatever they can to benefit themselves. AI is at its core data collecting. A corporation could use the knowledge it gleans from this data collection to control or manipulate people. To push groups of people to believe or back certain ideas and beliefs.  
—Jared, Gen X, Atlantic



My concern would be how we can make sure that they will still do things within a good ethical boundary. This really needs careful monitoring and regulating from government, users, and companies.  
—Rosa, Gen X, Ontario

56%

AI is going to put too many people out of work

59%

Corporations are going to use AI to sell people more stuff they don't need

65%

Corporations are going to use AI to exploit and manipulate people

67%

There are no laws that require companies to tell people when AI is being used

The cost savings from AI  
should be passed to customers.

—Christopher, Gen X, Ontario

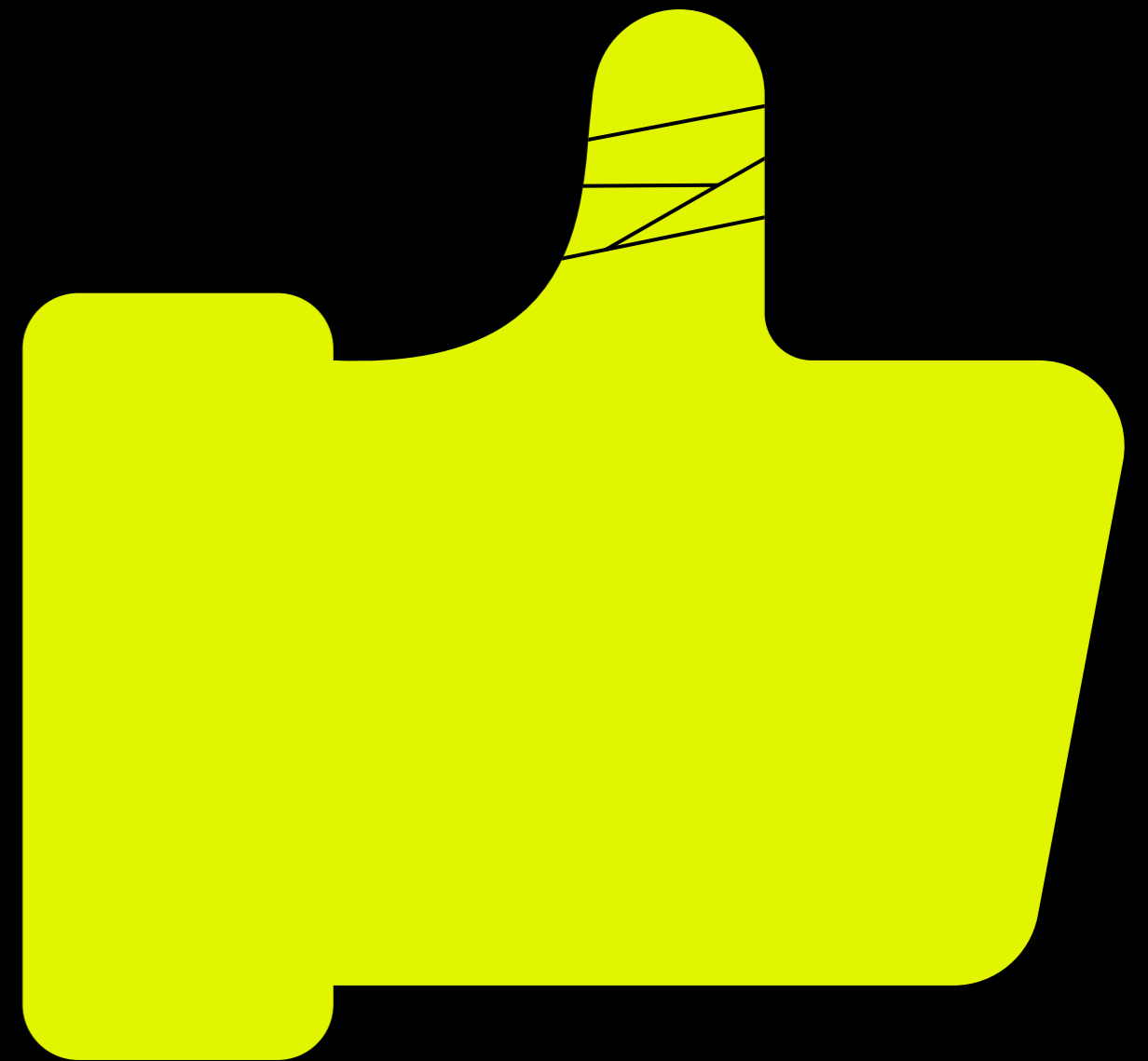
The Way Forward →

# People want something in return.

Artificial Intelligence has moved from behind the scenes to centre stage, leaving most Canadians with concerns about which trajectory we're on. To succeed in adoption, brands need to give consumers confidence that AI is working for, not against, their interests.

- 1 Don't be a black box**  
In the absence of regulatory oversight, transparency is key. Companies that reveal when, how, and why they're using AI will build trust and acceptance.
- 2 Benefit people, not profits**  
Canadians see AI making things easier, cheaper, and quicker, but they feel like only the companies are benefiting. Canadians want to get their share of the benefits (e.g., better UX, lower prices, faster service).
- 3 Make your AI...intelligent**  
Fairness and accuracy matter. Canadians want AI to make the right decisions and the ethical decisions. From truly smart chatbots to ethical credit decisions, Canadians expect AI to be better.

# Status Update: It's Complicated



# Social media has lost its shine.

Only a few years ago, alarm bells rung about the potential negative impacts of social media were often dismissed. Like the supposed evils of television and rock 'n' roll before it, many insisted that concerns were exaggerated by out-of-touch (older) adults who didn't appreciate new cultural evolutions.

Today, that's all changed. Instead of dying down over time, concerns about social media have become mainstream across generations, with two-thirds of all Canadians believing that social media is harmful to people's well-being. A closer look reveals that their concern is driven by the always-on nature of social media and its constant drumbeat of engagement-driven popularity content.

	Gen Z	Millennials	Gen X	Boomers+
More people have an addiction to social media than they realize	69%	69%	73%	77%
Young people's self-worth is tied to the volume of "likes" they get	60%	70%	70%	70%

65%

Social media is harming the well-being of people today



I used to love social media, but I am finding that as I grow up, I dislike it more and more and realize how many disadvantages are caused because of it. I find that my mental health declines when using social media, it is like an addiction, and it is difficult to stop.

—Cameron, Gen Z, Ontario

67%

Social media is harming the well-being of youth today

53%

I spend more time on social media than I would like

60%

Young people's self-worth is tied to the volume of "likes" they get

## Gen Z is not gonna fight for their right to scroll.

Even gen Z is concerned about the ways social media is hurting them, and they're making changes. Trends like silent walking, dumbphones, and disposable cameras demonstrate the ways that this coming-of-age generation is evolving their relationship with social media and the technology they grew up on to feel more in control of what and how they consume content. They're also giving us a glimpse into the future of social media, as the expectations placed on social media companies and advertisers influence how the system operates.

“

Social media makes me feel like I have low self-worth, and like I am just one tiny fish in an extremely large ocean. A small, fragile, weak, ugly fish.  
—Cameron, Gen Z, Ontario

Statistics are for gen Z.

## Where is the social in social media?

No surprise here—the more digitally connected we become, the more alone we feel. But there's more to the story. It's not just our use of social media and technology that's keeping us apart; it's how and why we use it. From young kids to parents, social media and the technology that enables it are straining our social relationships.

57%

Online racism and abuse are so rampant that people just accept them

64%

Social media is creating a generation of distracted parents and caregivers

65%

Online bullying is largely ignored and allowed to continue

66%

Social media is making people more divided

## A wasteland of misinformation.

140 characters. 7-second videos. Click-bait headlines. A constant flow of problems without solutions and beautiful people selling things you didn't know you needed. That's the social media of today, and people aren't interested in it being the future.



There is so much misinformation online and people take it at face value. There is a risk we lose our ability to really ask ourselves questions.  
—Charlene, Gen X, Quebec



The only reason social media is functioning is because it is a revenue generator making huge profits from advertising.  
—Daniel, Millennial, West

# 72%

Social media has become a wasteland of misinformation

# 71%

Too many people are getting their news from TikTok or similar short-form videos

# 69%

Influencer culture, where people are paid to promote products, has become so rampant that it's hard to know who to trust

The Way Forward →

# Brands should use social media for social good.

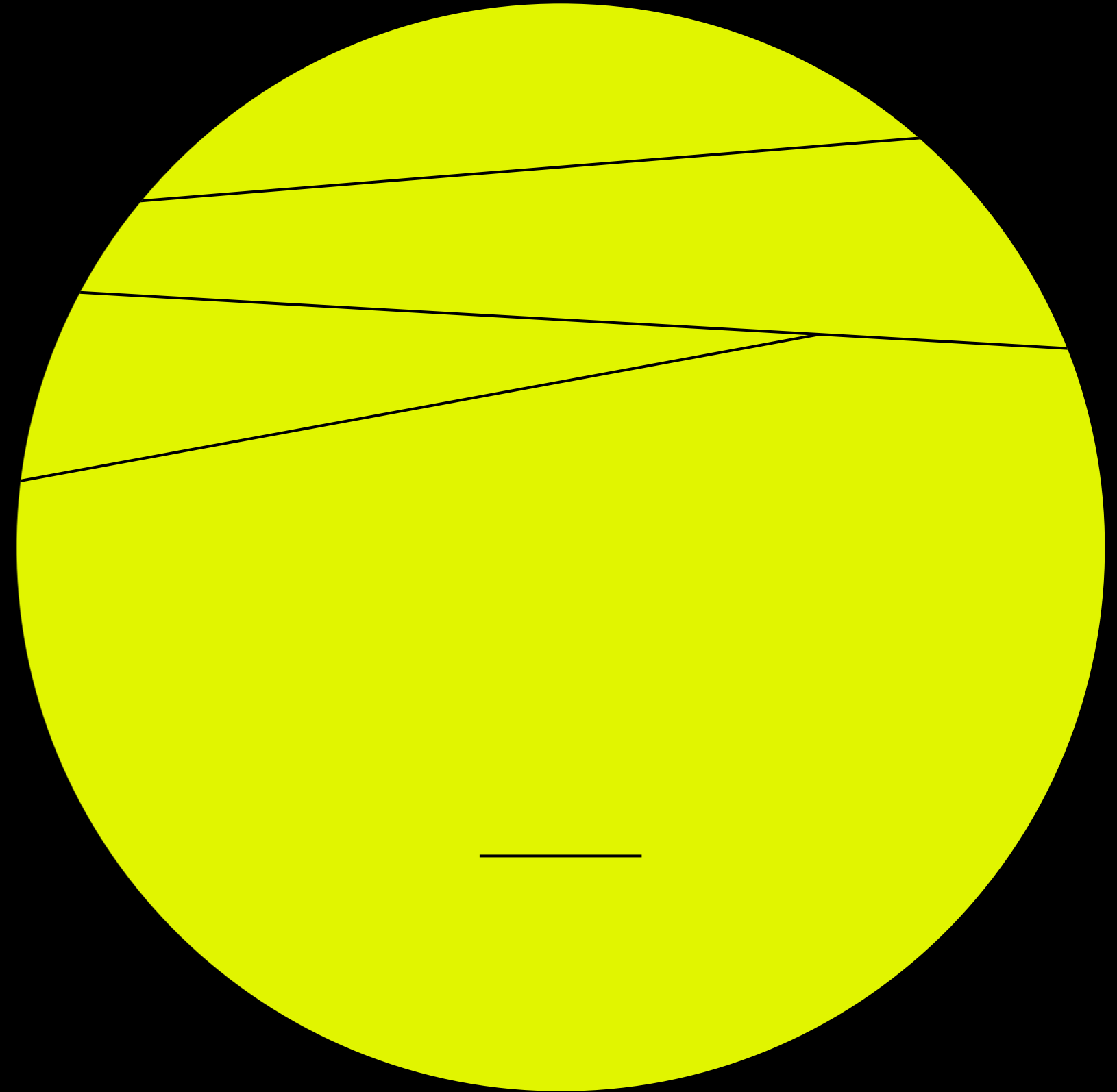
Canadians can quickly list the many ills of social media. They have little trust in the platforms to do the right thing, but they see a role for brands to help clean up social media from the content out.

**1 Finsta your Insta**  
Canadians want brands to show authentic life moments, like the real-life Finsta movement. Brands can win by deglossing their content, being authentic, and seeing platforms as more than an advertising channel.

**2 Lean in to clean up the platforms**  
People want brands to use their power to clean up the platforms. This isn't about boycotting; it's about actively finding ways to help clean up content on the platforms (e.g., plug-ins, apps, campaigns).

**3 Make social media more social**  
Social media is everywhere, and people want to step away sometimes. Brands can foster a healthier relationship with social platforms by creating tools, promoting detoxes, or limiting promotions to certain times.

# Patience- Centred Care



I don't know about everybody else, but I was brought up quite proud of Canada's healthcare system. And then as I got older and experienced it, that pride continued a fair bit, but now you hear all these recent stories that are much worse. You expect to have good healthcare available when you need it. And it seems like that's not the case anymore.

—Ethan, Boomer, Ontario

# 73%

Our healthcare system is more vulnerable now than ever before and won't be able to handle another major health crisis (vs. 64% in 2023)

# 72%

The quality of our healthcare system is getting worse, not better (vs. 62% in 2023)

## Canadians need a better next normal.

The past few years shone a light on the healthcare systems like never before, and Canadians are not confident about the future of our once-celebrated universal system. Experiences have been lived; stories have been shared; faults have been exposed; and there is an increasingly urgent human concern: people are scared that help will not be there when they need it.

The fear of being left vulnerable from a lack of healthcare access has risen since one year ago and is currently one of the biggest concerns of Canadians. The pandemic was not the low point; the low point is now. Four years on and people realize that the problem wasn't just the acute issues caused by the pandemic; it's a system struggling to keep up with a long list of factors.

Many Canadians are also worried that in this current economic environment, more people need support than ever, and are less likely to get it. With all the complicated problems in the world, where causes or solutions are not obvious, lack of healthcare access seems frustratingly straightforward to solve.



# Wall-to-wall wait times.

Access to healthcare has become a daily challenge. Wait times for specialists are growing into wait times for primary healthcare, and the continuity of care and triage provided by family doctors are unattainable for many Canadians. Hallway healthcare is getting worse. This study heard many stories from Canadians who are left outside the system, and without other options, are using walk-in clinics and emergency departments as fallbacks.

61%

There aren't enough options when it comes to healthcare providers

66%

Our healthcare system is too focused on reactive rather than proactive care



I have to use the internet to solve medical problems because it's so hard to see my family doctor when I need to.  
—Achike, Millennial, West

The health needs of Canada's aging population are being ignored, with dire consequences

52%  
Gen Z

60%  
Millennials

70%  
Gen X

81%  
Boomers+

## Tik, Tik... boomers.

The greatest fear for older Canadians is that they will not be able to address their growing health needs with adequate resources and support. They are worried that their lives may be needlessly and avoidably undignified, cut short, lonely, or painful, and they shouldn't have to feel this way.

There have been decades of warnings about the strain on the healthcare system because of the aging baby boomer population, anticipating a steady march forward to the inevitable time when their needs will be highest. Unless changes are made, those needs will outmatch capacity. Aging is scary enough for most people, and the large generation sees a real risk of being left without care when they are at their most frail and vulnerable.

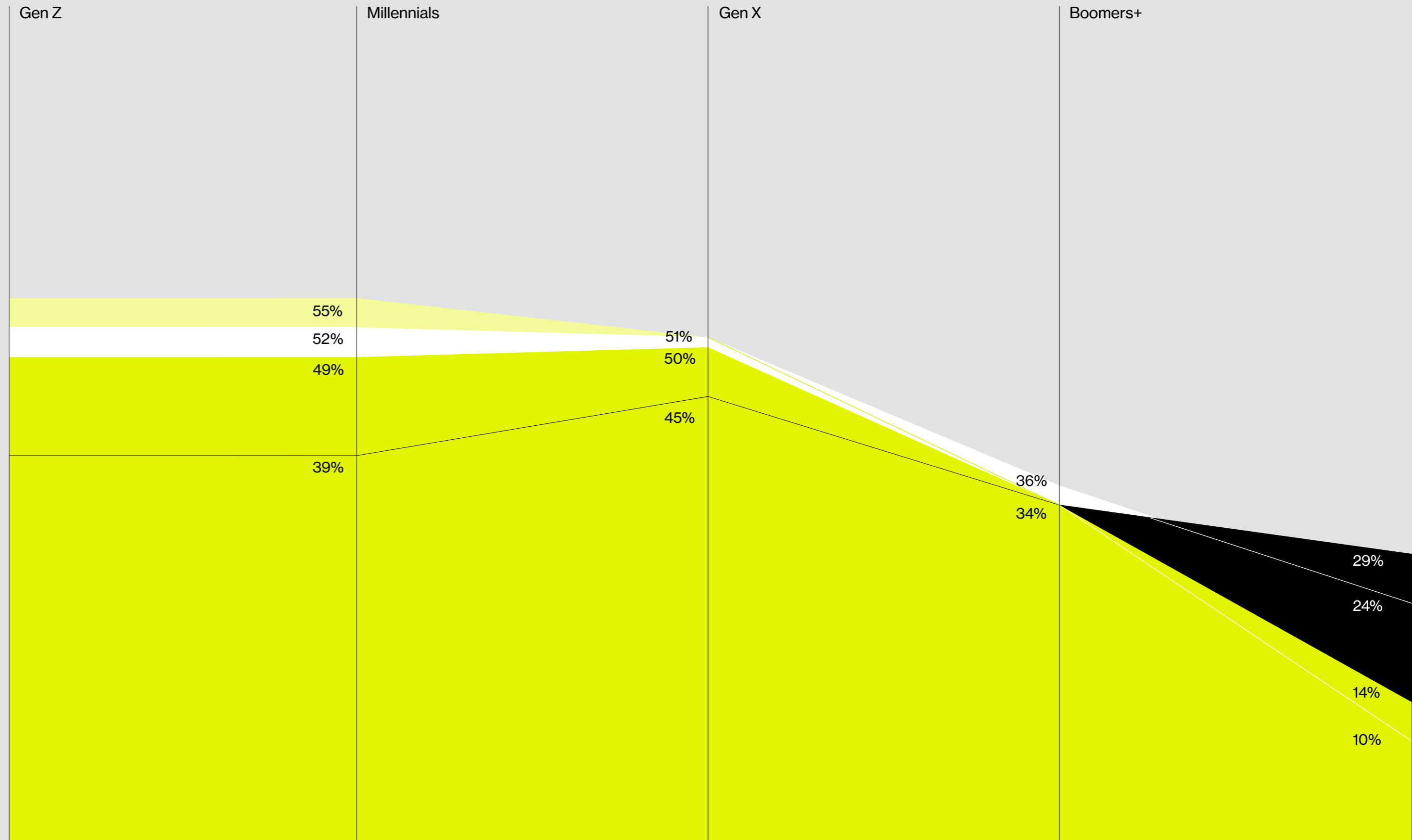


It scares me... I'm healthy but I know that I'm not always going to be healthy.  
—Kathleen, Boomer, Atlantic

# But healthcare gaps are highest in young Canadians.

Boomers may be loudly concerned about their health futures, but it is younger Canadians who report the highest rates of current unmet healthcare needs. Throughout this study, millennials and gen Z have reported extreme time pressures, and physical and mental strain—with half of them reporting they feel like they are barely surviving and not thriving. The weight of the world feels crushing, and they need better back pain coverage.

- I have a healthcare need that is unmet by my provincial healthcare
- I struggle to proactively prioritize my health and well-being
- I can't afford to get sick because I can't afford to take time off work
- I put off going to the doctor when something might be wrong because it takes too much time out of my day

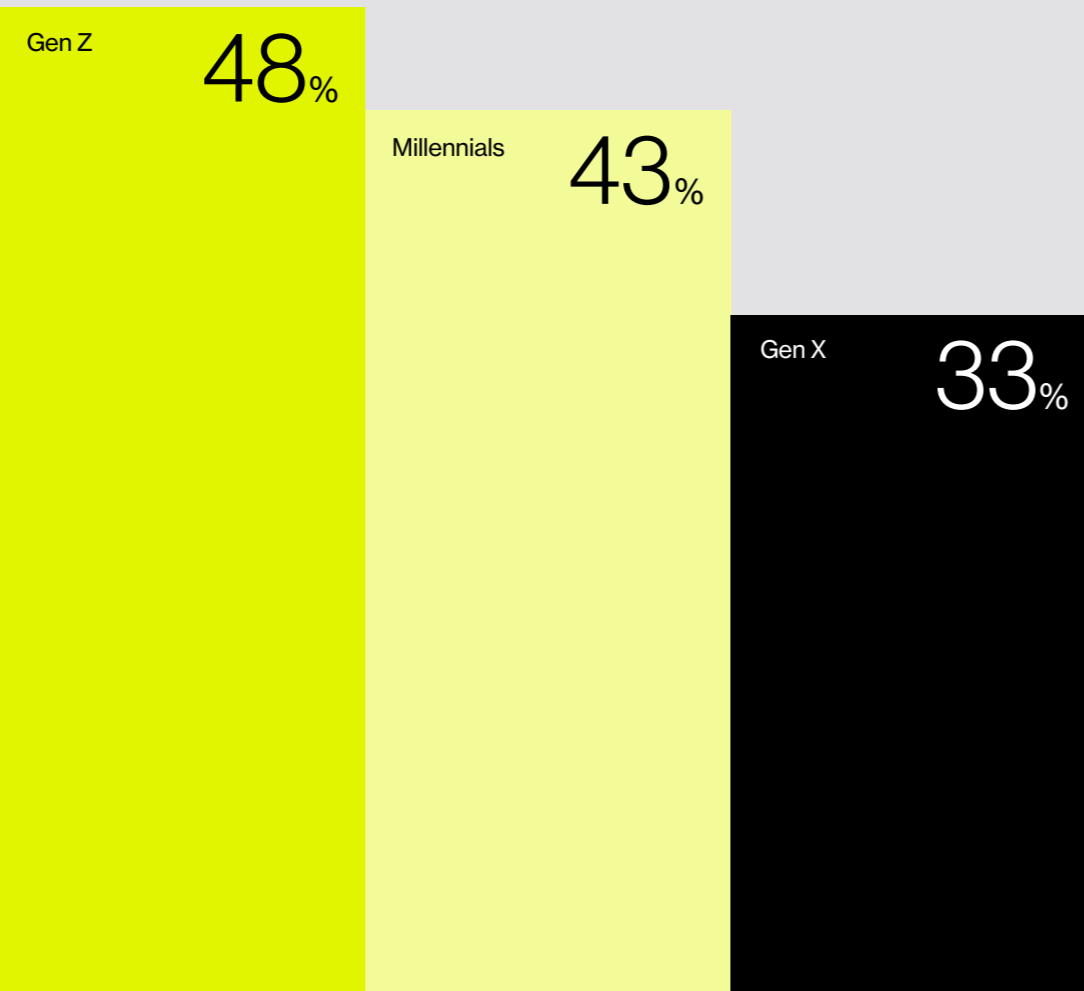


# Mental health is health.

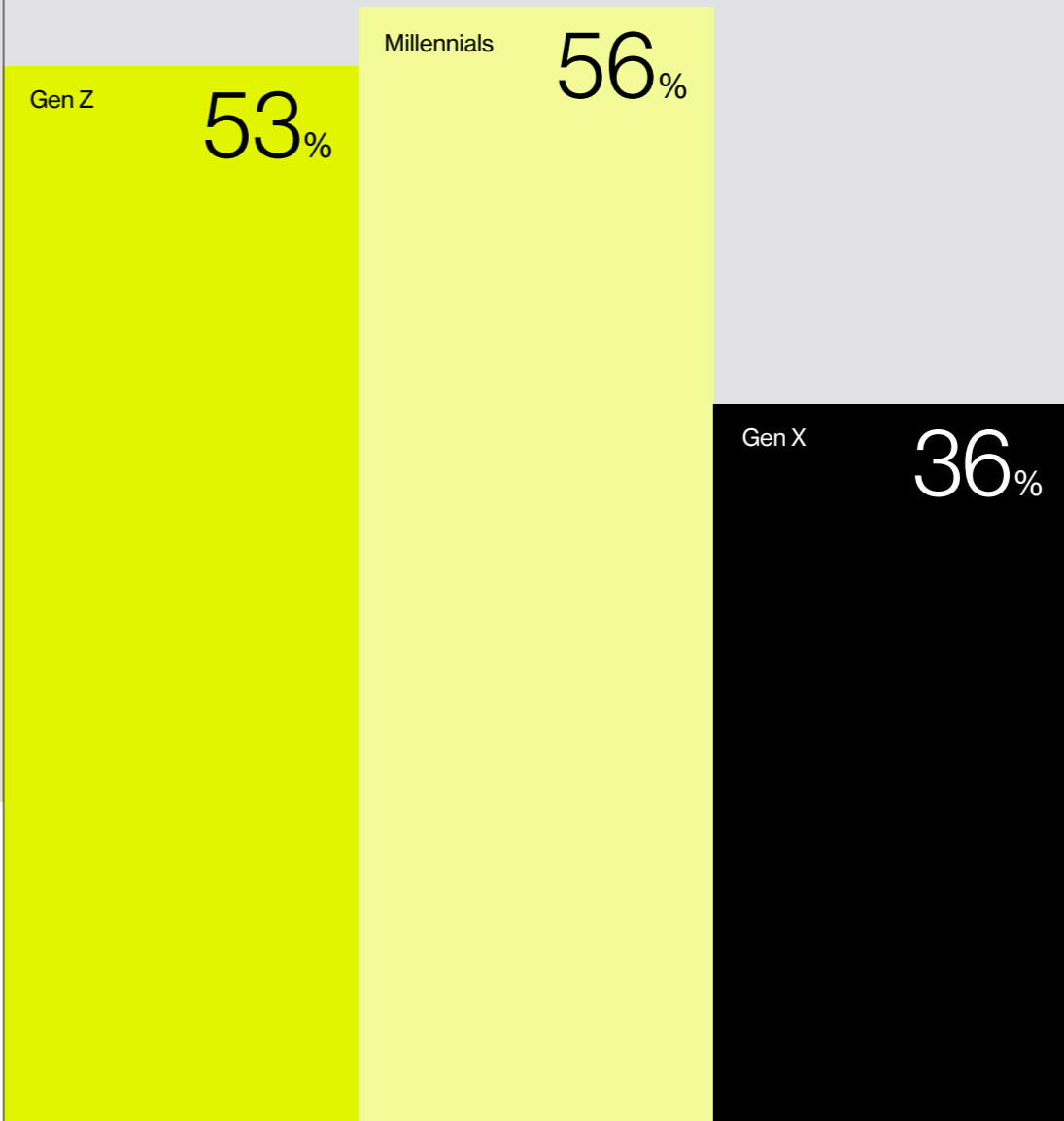
The strain on young Canadians continues into mental health. The generations known for campaigning to reduce mental health stigma are facing emptiness on the other side of asking for help. Overall, gen Z and millennials in our study are expressing higher rates of concern and worry than their older compatriots, stressing about how they will take care of their children, put food on the table, move out, get a career, keep their jobs, save the planet, find love, and more. About half of them report mental suffering with no clear solution, and sharing anxiety memes will go only so far to making them feel better.

When the 35% of Canadians identified as someone who could benefit from mental healthcare were asked about the barriers to receiving it, 63% labelled the complexity of navigating the system and 59% reported the cost.

The stress and anxiety I feel in my life are sometimes more than I can bear



I think I could benefit from mental health or mental wellness services



# Tepid waters for expanding private healthcare.

Despite all of the challenges, and the palpable desire for change, Canadians are still warming up to the idea of brands playing in the healthcare space.

38%

I am comfortable with private brands filling some of the gaps in our healthcare system

The Way Forward →

# Finding the healthy place for brands.

There is a clear need for better access to healthcare, but brands must wade carefully into the waters of private healthcare.

While some Canadians see a role for brands, opinions about the specifics of that role vary.

- 1 Connect people with the help they need**  
It can be hard to get the healthcare you need when you need it. Brands can help by tackling pain points and charting a new relationship with healthcare (e.g., continuous glucose monitors, wellness clinics).
- 2 Put. Patients. First.**  
Canadians worry that profits will come before patients. To navigate these waters, brands should consult with patient advocacy groups, avoid the perception of conflict, and create patient-centric KPIs, not just business KPIs.
- 3 Create healthcare for all**  
One of the biggest concerns for Canadians is unequal access to healthcare. Brands should make healthcare more accessible to more people, rather than only to those who can afford it (e.g., video nursing access, travelling rural clinics).

It's time to  
think forward.

The findings in this study are a tremendous opportunity for brands. With a greater understanding of what's on the minds of Canadians and the barriers in their lives, brands can help to alleviate people's problems and, in doing so, increase brand trust, intimacy, and, ultimately, growth.

To learn how Leo Burnett can help you understand the people behind your brand's growth, please visit or reach out directly to [richard.newman@leoburnett.ca](mailto:richard.newman@leoburnett.ca) to learn more about the new Leo Burnett "Think Forward" creative product.

“What helps people  
helps business.”

*Leo Burnett*

# Methodology

## PHASE 1

Quantitative Problem Assessment

---

## PHASE 2

Qualitative Problem Exploration

---

## PHASE 3

Quantitative Problem Validation  
and Brand Baseline

---

## PHASE 4

Qualitative Deep Dive

---

## AUDIENCE

Canadians aged 18+, all provinces  
Results weighted to census demos on  
age, gender, region, and education

Age generations are:

Gen Z (18–25)

Millennial (26–41)

Gen X (42–57)

Boomers+ (58+)

---

## TOTAL SAMPLE

4,150

---

## DATE RANGE

June–November 2023

---

## REPORTING

All data displayed in this report is  
Top 2 Box (T2B) unless otherwise stated.

---

Leo Burnett Canada developed this  
report in partnership with Maru/Blue.

 maru/BLUE