

Gen Z: Growing Up, Staying In



At the onset of social distancing in the U.S., we understood the pandemic would leave its most lasting mark on this up-and-coming generation. In the months since, as graduations and sports were cancelled and back-to-school plans are now tenuous, this generation's stress has been severely amplified. We are all a part of Gen-C now—a group significantly and lastingly affected by coronavirus—but Gen Z, in such a formative period, will be defined by today's pandemic, difficult economic conditions, and overall uncertainty.

THEIR SIZE IS SIGNIFICANT

55+ million

Americans between
13 and 25



**\$143B in
spending
power**

MAPPING THE RETAIL FUTURE



Gen Zers are highly mobile, but **they love stores**; brands need to adapt with safe, special experiences

- **81% prefer in-store shopping**
- **73%** like in-person discovery



Still, **50% are shopping online more than pre-pandemic**, and 34% will continue to do so

COVID EXPOSURE CONCERN LOWER THAN OTHER GROUPS



- Gen Z was most worried about exposure to COVID-19 the week of April 10th-16th

- **At the peak, 56% were worried**, as compared to 60% of all adults
- They have been less concerned about exposure throughout the pandemic

CONVERSATION AND CONTROL



- Gen Z is accustomed to having a voice in brands and they love that role
- They are **2X more likely to give positive feedback** than complaints
- Their worlds are uncertain; **through self-care, organization, and planning tools**, brands should aim to give this generation a sense of control

GIVE BACK AND KEEP IT REAL

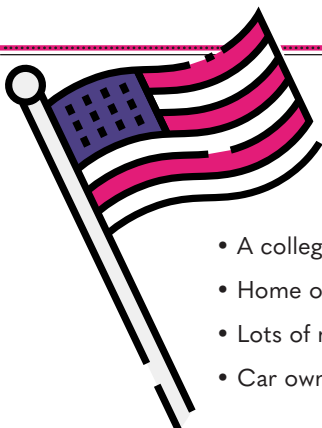
- Gen Z is **3X more likely to say the purpose of a business is to serve communities and society**



- **Authenticity matters:** imperfect TikTok videos and Billie Eilish's raw emotion show that Gen Z will choose honesty over flawlessness

ON GAMING AND VIRTUAL CONNECTIONS

- They are 2X as likely than other U.S. adults to say that playing a console game is their favorite activity
- 62% feel that they can form a meaningful friendship with someone they have only met online, as opposed to 40% of other U.S. adults



THE AMERICAN DREAM

77% think that a well-paying job

is required to be successful in America, followed by:

- A college degree: 65%
- Home ownership: 58%
- Lots of money saved: 53%
- Car ownership: 48%
- Being their own boss: 34%
- Getting married: 18%
- Having kids: 17%
- Plenty of social media followers: 14%