

BDO KNOWS

GET CRISIS SMART

COVID-19 - A GENERATIONAL VIEW

July 2020

CONTENTS

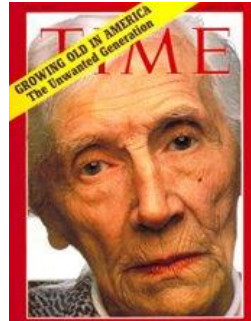
1. *Generational research to date*
2. *United by lockdown*
3. *Divided by impact*



Have been the subject of research and debate for decades



1968



1970



1971



1982



1986



1988



1993



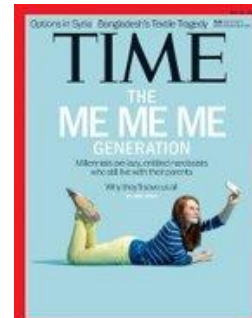
1990



1997



2011

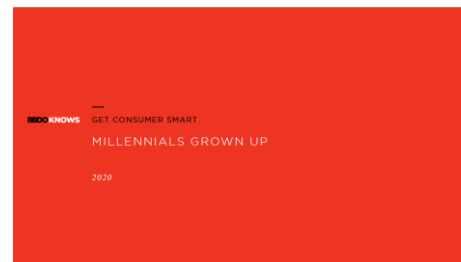


2013



2015

Over the last few years, we too have explored different generations*, in an attempt to understand **what sets them apart from their predecessors and successors** - and what this means for brands seeking to appeal to them.

**2018****2019****2020**

Previous research has tended to scrutinize **each generation in isolation**, or pit one generation against the other.

But the pandemic has created a unifying context for us all. Every age and generation has been impacted, which prompts the question, **what value can we extract from cross-generational analysis?**








In this paper, we consider the impact the pandemic, its accompanying lockdowns, and the ensuing recession have had and will continue to have on different generations.

In particular, we consider **the ways in which the impact has united us all, versus the ways it has been felt differently.**

A NOTE ON DEFINITIONS

Which vary slightly by data source

The key sources cited in this paper have either broken data down by generation or age brackets.
Here is a brief overview:

	 GEN Z	 MILLENNIALS	 GEN X	 BOOMERS
	16-23	24-37	38-56	57-64
	5-24	25-40	40-55	56+
 <p>No generational data split. We use age brackets to approximately place results under generations in question.</p>	16-24	25-34	35-44	45-54
				55-64

UNITED BY LOCKDOWN

How the pandemic has brought generations closer together in behaviour



The coronavirus pandemic has touched us all. The experience, shared globally and across all age groups, will leave a lasting impression.

In the early stages and during lockdown, we were all united by worry, isolation and The Great Pause.

- 1. WE WERE ALL WORRIED –**
and needed control, escapism and support

**GenZ Agonized by
Lockdown –**

**Millennials are the ‘worried’ generation and
changing spending habits most amid
coronavirus outbreak, study shows**

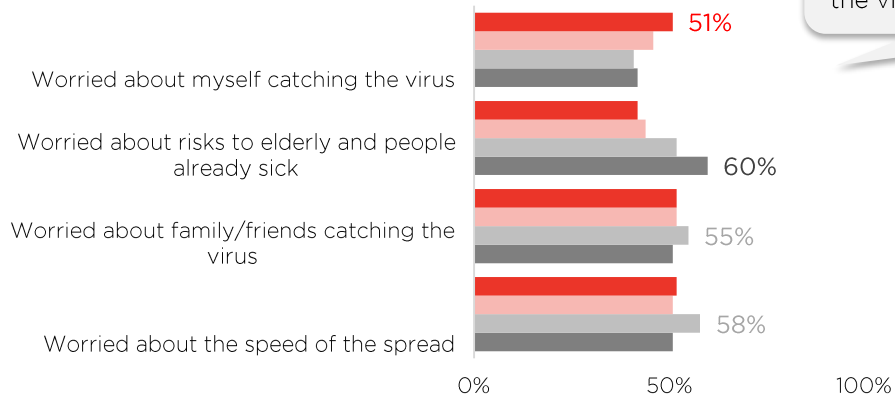
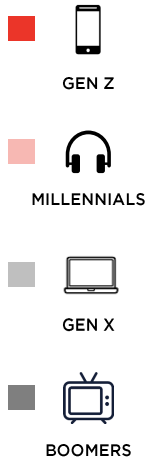
Coronavirus quarantine? Gen X was made for this. Boomers and Gen Z, not so much.

**CONVINCING BOOMER PARENTS TO TAKE
THE CORONAVIRUS SERIOUSLY**
By Michael Schulman
March 18, 2020

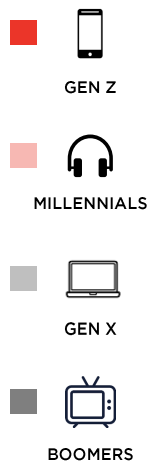
**Frustrated millennials say they can't get their
aging parents to cancel their cruises, stop
going to church, and take coronavirus
seriously**

No matter our life experience and age, this was the first pandemic for all of us.

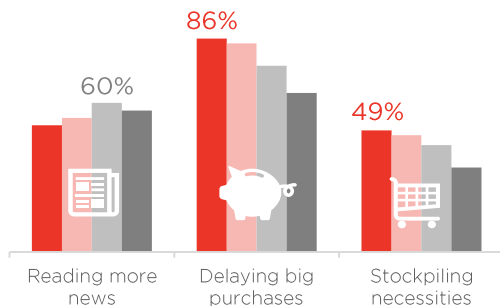
Worry in the face of the unknown was the dominant feeling as we embarked on lockdown.



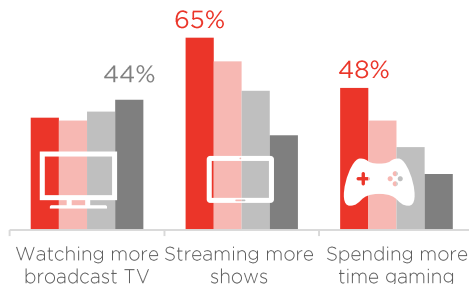
Interestingly, the generation least at risk started off with the highest level of worry about contracting the virus.



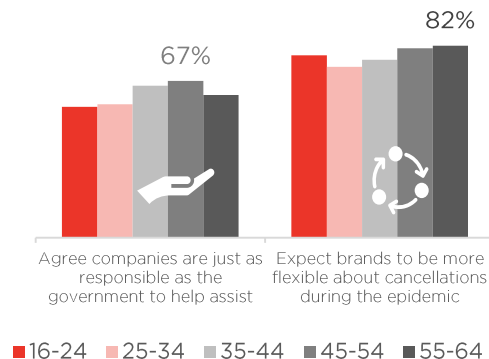
INFORMED AND ON GUARD



ESCAPING MORE OFTEN



EXPECTING SUPPORT FROM BRANDS



Broadcast TV became more inter-generational than ever – as it offered unity, escapism and comfort at the same time.

2. WE WERE ALL ISOLATED –

and sought connection with each other, while bolstering our resilience by learning how to get things done in new ways



Global Agenda COVID-19 Global Health
Nearly 3 billion people around the globe under COVID-19 lockdowns - Today's coronavirus updates

The 'New Normal' for Many Older Adults Is on the Internet

For some people over 65 facing loneliness and prolonged isolation, expanded tech literacy is a new skill that may stay with them long after lockdowns lift.

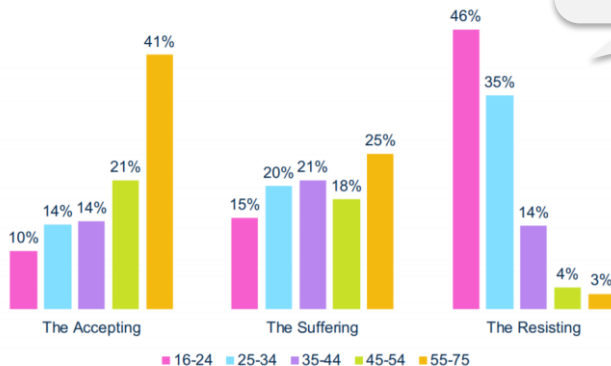
Lockdown restrictions made no exceptions for any of us, regardless of demographics or any other factors. We were all confined to our homes. Lockdown felt particularly restrictive to the younger generations who tend to be out and about more.

41%

of Millennials and Gen Z
found it hardest to give up
the social interaction,
followed by freedom and
leaving the house.

Source: Kantar, April 2020, Global,
[LINK](#)

Age distribution of groups

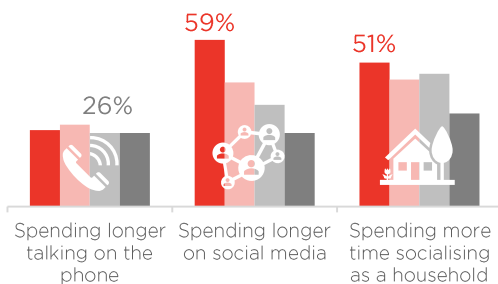


“Older people are by far the most likely to be accepting of the lockdown.”

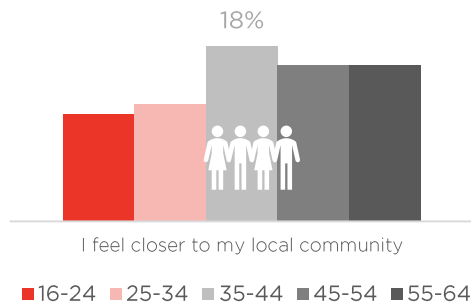
Source: The three groups reacting to life under lockdown, King's
College London, [LINK](#)



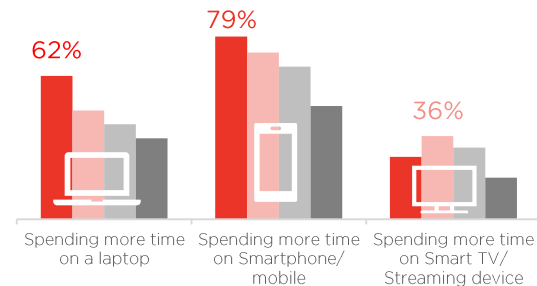
CLOSER TO LOVED ONES



CLOSER TO LOCAL AND GLOBAL COMMUNITIES



POWERED BY TECHNOLOGY



The pandemic, with its sense of “we’re all in this together”, heightened the overall levels of empathy.

3. WE WERE ALL ON PAUSE –
and sought new rituals and routines for
the temporary context

***As School Moves Online, Many
Students Stay Logged Out***

Teachers at some schools across the country report that fewer than half of their students are participating in online learning.

The Daily Telegraph
Life put on hold

◆ Whole households with symptoms of virus must stay indoors for two weeks ◆ Avoid pubs, theatres, large gatherings and work from home if possible

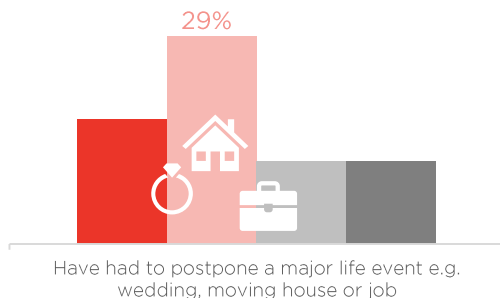


Revealed: All 217 destinations in the world now have coronavirus travel restrictions, representing the most severe curbs on movement in history

***'Just Sitting in Limbo.' For Many
Professionals, Careers Are on Hold.***

LIFE PROGRESSION ON PAUSE

A TEMPORARY REGRESSION FOR SOME



How Coronavirus Is Sending Millennials Back to Their Childhood Bedrooms

When the Pandemic Sent You Back to Childhood

For young people who moved back in with their parents and siblings during coronavirus lockdowns, adulthood has been suddenly, strangely interrupted.

'My mum interrupted a work Zoom call to tell me off': The millennials who have moved back with their parents during lockdown

The pandemic has impacted the youth the most in terms of life progression, leaving them grieving for missed graduations, birthday parties, exams and other life milestones on the way to adulthood.

Younger generations saw their life progression decelerate more than others, and their outlook for the near future remains uncertain.

“ Across the globe, **consumers have hunkered down and figured out how to fulfill their needs**—from socializing to eating to having fun—**through a mix of traditional approaches and new**, technology-enabled methods. Suddenly, spending time with family and cooking meals at home are sharing the spotlight with video and delivery apps.”

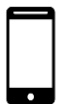
— BCG, *How Marketers Can Win with Gen Z and Millennials Post-COVID-19*, [Link](#)

Across generations in lockdown

WORRIED

ISOLATED

ON PAUSE



GEN Z



MILLENNIALS



GEN X



BOOMERS



Gen Z acquires a TV habit

2 min read News, 19 June 2020

Millennials and Gen Z lead the way for DIY projects during lockdown

Covid-19 is domesticating millennials. Who thought that would be possible?

In covid lockdown, lonely millennials turn to gardening, fostering pets

LA GEN X ET LES BABY-BOOMERS FONT LE PARI DU E-COMMERCE POUR NOËL

Gen X and Boomers bet on e-commerce for Christmas

Baby Boomers: Digital Banking Adoption Leaders?

Boomer and Gen-X Interest in Bitcoin Surges During Pandemic

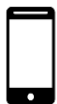


The lockdown living sweet spot – back to basics, powered by technology

WORRIED

ISOLATED

ON PAUSE



GEN Z



MILLENNIALS



GEN X



BOOMERS

College In The Fall? Gen-Z
Students Are Not So Sure

How Coronavirus Is Sending
Millennials Back to Their Childhood
Bedrooms

Two Parents. Two Kids. Two Jobs. No
Child Care.

And no end in sight.

Why Don't More Boomers Care About
Coronavirus?

A new survey shows that baby boomers, one of the groups of people most likely to experience complications from COVID-19, are also the least likely to worry about contracting it



MORE LIKELY TO HAVE
FELT **THE PAUSE**



MORE LIKELY TO HAVE
FELT **THE RETREAT**



MORE LIKELY TO HAVE
FELT **THE PRESSURE**



MORE LIKELY TO FEEL
THE PEACE

The early stages of the pandemic saw us all united in lockdown. Our behaviours converged due to circumstance but our psychological impact varied enormously:

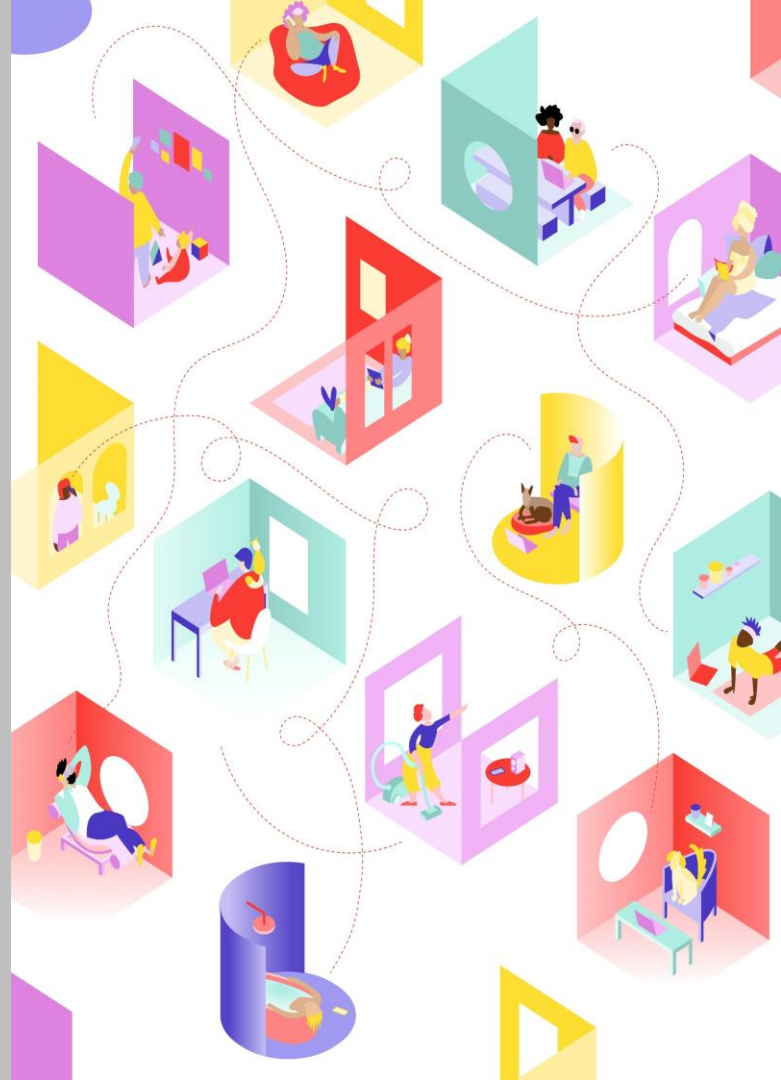
- 1) Younger people have seen the disruption **hinder their progress and even cause them to retreat in terms of life progress.**
- 2) Older generations are more likely to have seen the disruption **increase the pressure on them** either by way of responsibilities or through a **perception of greater risk.**

How will this experience translate into future attitudes and behaviours?

And will this vary by generation?

DIVIDED BY THE IMPACT?






*Generations through the lens of
5 Emotional Drivers*





As we continue to emerge from lockdown and move back towards an altered version of the reality we once knew, we will be driven by a series of key, often heightened, needs.

These needs, or drivers*, will be crucial in determining our behaviour in the coming weeks and months, and even beyond. In particular, they will impact our purchasing behaviour and our relationships with brands.

Will dictate our behaviour

					
	RISK	OPTIMISM	VALUES	RESILIENCE	RITUALS
NEEDS	SAFETY REASSURANCE SECURITY	JOY HOPE WIN WELLBEING	BELONGING COMMUNITY FAMILY SUSTAINABILITY	WELLBEING SUPPORT SUCCESS WIN THRIVING	COMFORT NOSTALGIA CONTROL ROUTINE
BEHAVIOURS	HYGIENE HEALTH SECURITY PREPARING FOR NEXT TIME RESILIENCEBUILDING	LITTLE JOYS LITTLE WINS CELEBRATIONSEEKING ESCAPISM PLAY	GIVING BACK LOCAL FOCUS RELATIONSHIPS CONNECTIONS	PLAY SKILLS	TRADITIONS (OLD & NEW)

But to what extent will these five drivers* vary in the impact they have on different generations, as we move out of lockdown and hopefully into a post-pandemic world?

& to what extent are we  or  by each of the five drivers?

DIVIDED **UNITED**

—

FIVE DRIVERS IN THE NO NORMAL

Risk



Increased financial risk for the younger, increased health risk for the older

**RISK**

Our relationship with risk has been irrevocably changed. Having lived through unprecedented uncertainty – no generation will emerge from the pandemic with the same perception of health, lifestyle or financial risk as before. Yet, some will be more scarred than others:



GEN Z



MILLENNIALS



GEN X



BOOMERS

FINANCIAL RISK**HEALTH RISK**

At the same time, all age groups articulate a (near) equal need to manage financial and health risks. This is likely due to the level of uncertainty around future waves and the resulting impact.

DIVIDED: HEALTH RISK



People at Increased Risk for Severe Illness

Older Adults

People with Medical Conditions

Medical Conditions Evidence Table

The pandemic came as a harsh and unwanted reminder of their age to many older people – as they were deemed the more vulnerable group.

CORONAVIRUS: ELDERLY AND VULNERABLE PEOPLE ENCOURAGED TO STAY HOME UNTIL THE END OF CONFINEMENT

Why are older people more at risk from coronavirus?

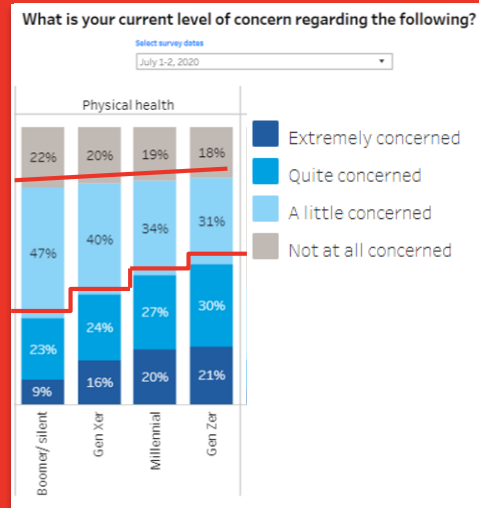
TRENDSPOTTER
Rita, 72, Belfast, N. Ireland



I have always been an adventurous traveller and love city breaks. I imagine I will feel more anxious and will probably not stray too far from home, at least in the immediate aftermath.

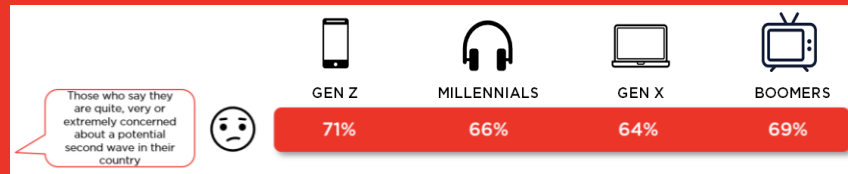


UNITED: LEVEL OF HEALTH CONCERN



Overall levels of concern are relatively even, regardless of age, with younger respondents displaying a stronger intensity around concern, despite lower risk levels.

Source: Salesforce, July 2020, Global, [Link](#)



Source: GWI, Wave 5, July 2020, [Link](#)

DIVIDED: FINANCIAL IMPACT



Those who say they expect COVID-19 to have a **big or dramatic impact** on their personal finances

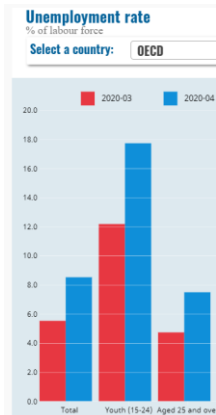


49% 36% 34% 26%

Source: GWI, Wave 5, July 2020, [Link](#)

Generation Z Is Bearing the Economic Brunt of the Virus

With adulthood and career paths barely having started, the pandemic and the global recession following it are a big hit to the present and future financial wellbeing of the youngest generations.

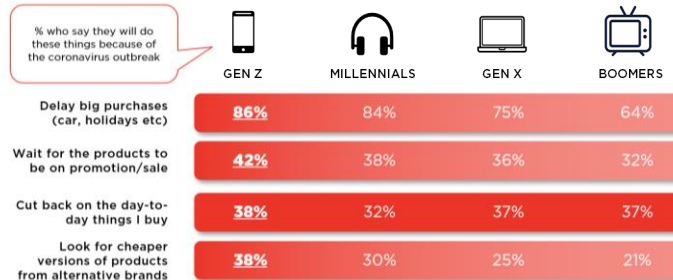


Source: [OECD](#)



UNITED: NEED FOR CONTROL

% who say they will do these things because of the coronavirus outbreak



Source: GWI, Wave 5, July 2020, [Link](#)

Delaying is the most commonly anticipated strategy for all generations. Impacted or not, everyone is still facing an unknown future and preparing accordingly.

Trading down, promotion seeking and cutting back are being adopted by a third of customers on average across generations.

Offer reassurance and support around financial and health risks



RISK

Despite the fact that health and financial risk affect different age groups to a significantly differing degree, the protective and control measures people are planning to put in place are unified across generations.

Two new hygiene factors for brands emerge: helping manage financial risk (particularly for non-essential purchases) and offering safe (whatever the definition of 'safe' is at any given moment in time) customer experiences and services.



GEN Z



MILLENNIALS



GEN X



BOOMERS

FINANCIAL RISK

HEALTH RISK

PERCEIVED LEVEL OF RISK

NEW HYGIENE FACTORS FOR BRANDS

Offering **safe customer journeys and experiences** (be it fully digital or physical), it's crucial to **give customers the choice** and reassure those who choose to engage with the brand in real life.

Support around financial risks (payment help, flexibility, adapted value propositions).

Offer reassurance and support around financial and health risks



RISK



NEW PRODUCTS OFFER PRACTICAL SOLUTIONS

First Dollar, a healthcare savings platform, is targeting Millennials and Gen Z to offer value-for-money healthcare. By putting their savings into a free account, members have access to discounts and more affordable pricing on prescriptions, primary and urgent care, dental care, eye care and holistic wellbeing packages. [LINK](#)



GEN Z



MILLENNIALS



ADAPT EXISTING PRODUCTS TO OFFER PRACTICAL SOLUTIONS

AT&T have made covid-friendly updates to their Ready to Go service, allowing them to maintain a retail presence for customers. Now available in select markets, consumer and small business customers can get fast door-step delivery with no-contact virtual expert setup with eligible device orders. [LINK](#)



GEN Z



MILLENNIALS



GEN X



BOOMERS

FIVE DRIVERS IN THE NO-NORMAL

Optimism



But also from person to person

**OPTIMISM**

Optimism is a crucial driver in times of crisis – it directly impacts the level of consumer confidence, which, in turn, provides an indication of willingness to spend.



GEN Z



MILLENNIALS



GEN X



BOOMERS

DISRUPTION**CONCERN****OPTIMISM**

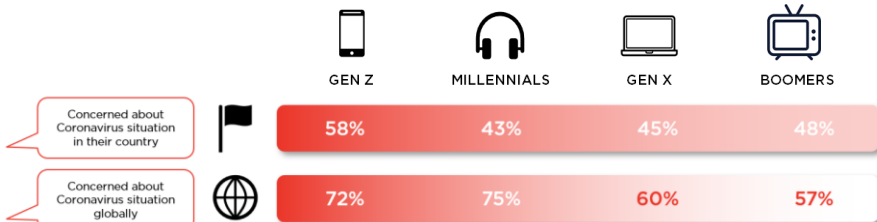
Young people entered the crisis with little life experience behind them and with far less stability. They were also the first ones to feel the full impact of income loss and life disruption.

Unsurprisingly, levels of concern rise as age diminishes, but so do overall optimism levels.

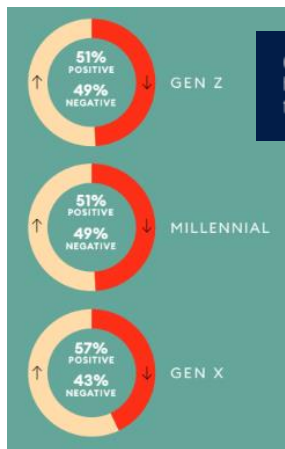
DIVIDED: LEVELS OF CONCERN



Concern around the overall impact this pandemic will have on the wider world is divided, with Gen Xers feeling more positive.



Source: GWI, Wave 5, July 2020. [Link](#)

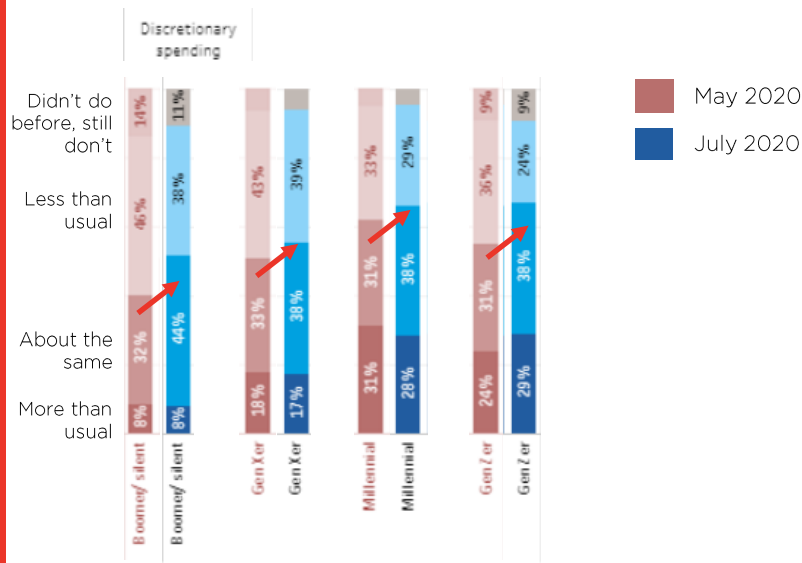


Source: Youth in Pandemic, VICE, [Link](#)



UNITED: (SLOW) RETURN TO DISCRETIONARY SPEND

To what extent are you conducting the following activities, compared to before the COVID-19 pandemic?



Source: Salesforce, July 2020, Global, [Link](#)

DIVIDED: LEVELS OF OPTIMISM



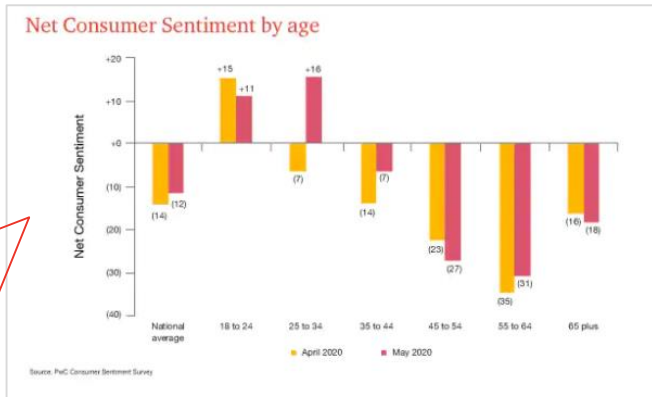
Counterintuitively, optimism levels are highest among the younger generations, despite them being the most concerned across the board.

Feel optimistic that the world will overcome the coronavirus / COVID-19 pandemic



Source: GWI, Wave 5, July 2020, [Link](#)

Millennials (25 to 44 year olds) have shown the largest increase in sentiment, whereas 45 to 64 year olds show fluctuating confidence. They remain the most negative age group, significantly more so than retirees.



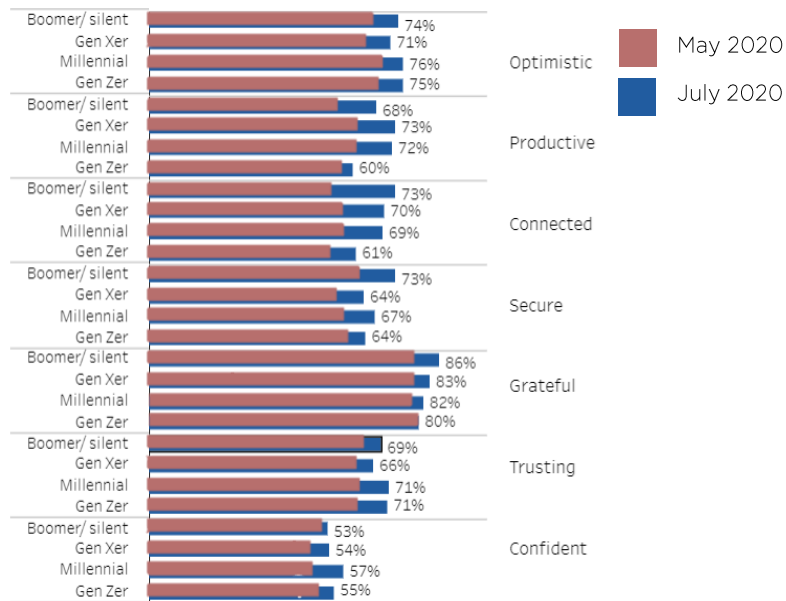
Source: PwC, Consumer Sentiment Survey May 2020, [Link](#)



UNITED: UPWARD POSITIVE TREND

Positive feelings have gone up over the last two months across all generations.

Which of the following words best describe your current feelings?



Source: Salesforce, July 2020, Global, [Link](#)

Offer levity, joy, little wins and treats

**OPTIMISM**

Younger generations are managing better at maintaining their levels of optimism, despite the overall negative impact they have experienced. Addressing their levels of concern with reassurance and supportive acts that provide much needed “little wins” will be more effective, while providing joy and a sense of hope might be more impactful for Gen X and Boomers.



GEN Z



MILLENNIALS



GEN X



BOOMERS

DISRUPTION**CONCERN****OPTIMISM**

**Little wins
Treats**

**Hope
Levity**

**OPTIMISM KEY FOR
MESSAGING**

Optimism can take many forms – from distraction in the everyday to the hope-inspiring messages for the future.

Yet, it is important to bear in mind that the current context of uncertainty heightens our focus on the immediate. Making a difference for today can be more impactful than talking about the future that so far remains uncertain.

Offer levity, joy, little wins and treats



OPTIMISM



SPEECHES FOR THE CLASS OF 2020

In April 2020, US radio station and digital audio network iHeartMedia announced a new podcast, Commencement: Speeches For the Class of 2020, featuring speeches from a range of industry leaders and celebrities. This is directed at students who will miss in-person graduation ceremonies because of the coronavirus lockdowns. Speakers include make up guru Bobbi Brown, musician Pitbull and former US Secretary of State Hillary Clinton. [LINK](#)



GEN Z



RADIO RECLINER

Launched in May 2020, Radio Recliner is an online radio station run by senior residents across the US. Recording shows via their phones, residents can sign up for a 60-minute DJ slot. The project aims to help seniors stay connected and combat isolation amid strict social distancing measures due to COVID-19. [LINK](#)



BOOMERS

FIVE DRIVERS IN THE NO-NORMAL

Resilience



RESILIENCE VARIES BY GENERATION

As people started off with different emotional and digital skill sets



RESILIENCE



GEN Z



MILLENNIALS



GEN X



BOOMERS

EMOTIONAL RESILIENCE

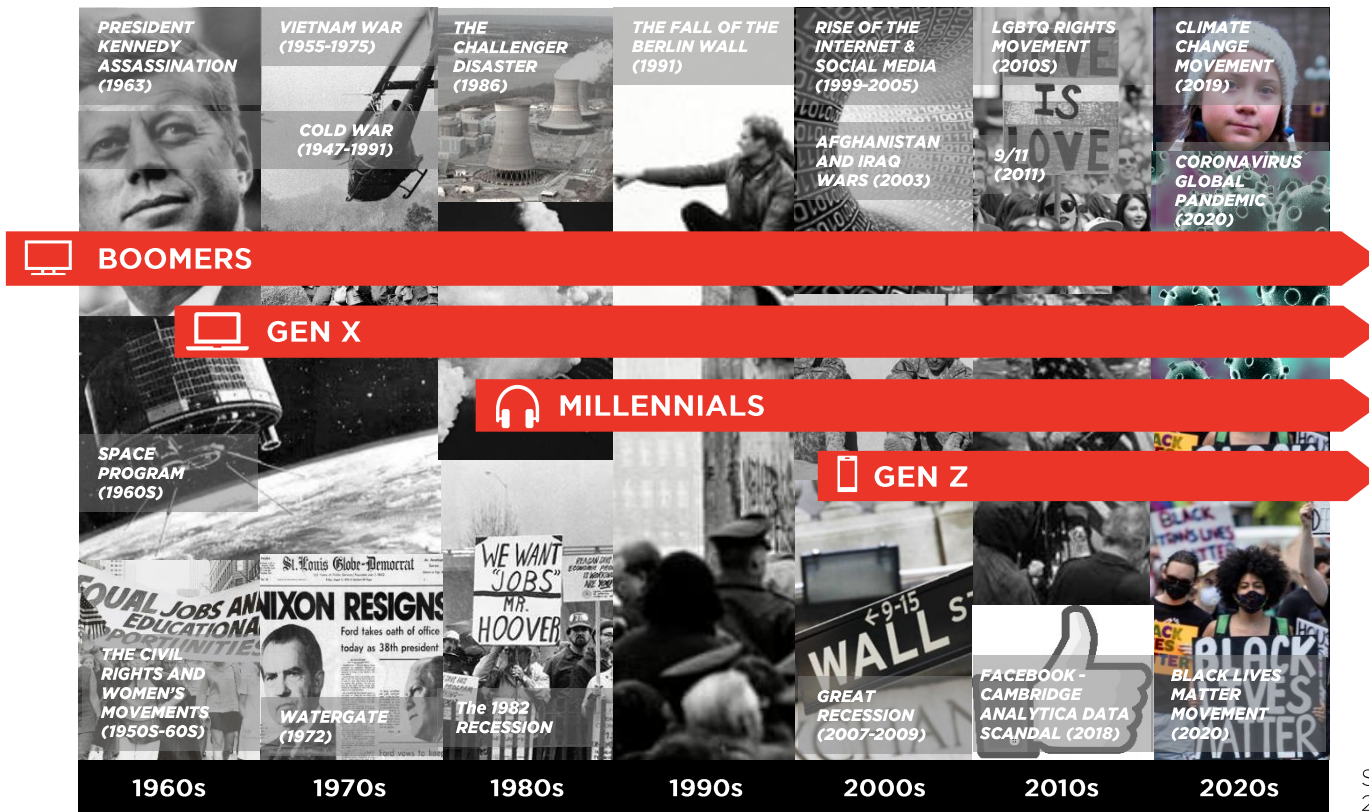
Older generations tend to be more emotionally resilient due to the richness of their past experiences.

DIGITAL RESILIENCE

In terms of practical skill set, "digital native" younger generations were much more prepared for the pandemic and lockdowns than their older counterparts.



Resulting in varied levels of built up resilience



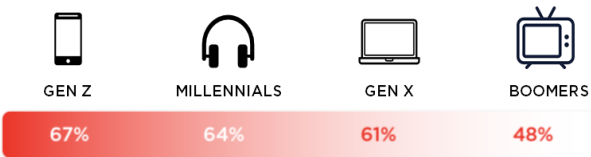


Younger generations struggle to maintain mental wellbeing

Higher levels of internal volatility due to lack of built up experience and resilience, as well as higher levels of uncertainty about the future experienced by younger generations – coupled with higher mental health awareness – mean that they're much more likely to report worsened mental health as a result of the pandemic.

"How has your mental health, including feelings of anxiety or depression, changed due to the COVID-19 (coronavirus) crisis?"

Worsened & significantly worsened



Source: COVID-19 mental health insights, NRC Health. [Link](#)

The 'loneliest generation' gets lonelier: How millennials are dealing with the anxieties of isolation and the uncertainties of life after quarantine

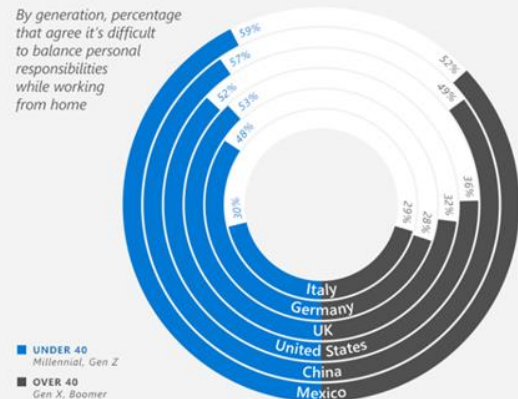


Microsoft 365

As work and life blend, Gen Z and millennials are struggling more than older generations to find balance

Source: Harris Poll survey commissioned by Microsoft on May 26-30, 2020, among 2,285 total adults ages 18+ who are currently working remotely across the US, UK, Germany, Italy, Mexico and China.

By generation, percentage that agree it's difficult to balance personal responsibilities while working from home

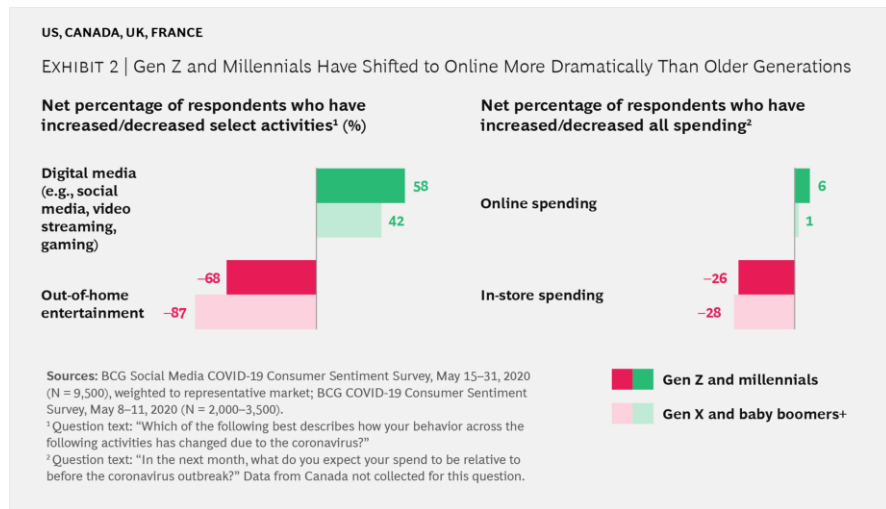




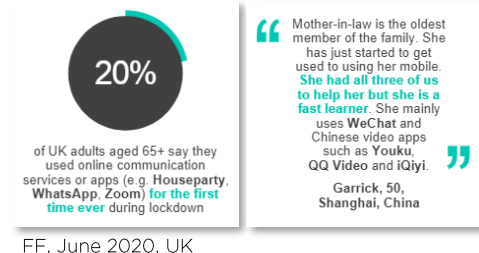
A universal behaviour trend, with varying levels across age groups

Younger generations, typically considered “digital natives” pre-pandemic, have “shifted online more dramatically” than Gen X and Baby Boomers. For the young, remote living meant more of what they were already doing pre-pandemic.

Whereas their older counterparts experienced a true digital acceleration, born out of necessity. The pandemic gave them a much-needed push towards stepping into digital lifestyles.



Source: How Marketers Can Win with Gen Z and Millennials Post-COVID-19, BCG, [Link](#)



“These are communities of older adults who are taking charge of the impact of physical distancing. And that is such a different narrative than the narrative around ‘victims of Covid dying.’”

Bloomberg, [Link](#)

“There are people who had a device but weren’t really using it. Those are the people who have big opportunities.”

— Louise Aronson, a geriatrician and professor of medicine at the University of California for Bloomberg City Lab, [Link](#)

Offer support, advice and tools



RESILIENCE



GEN Z



MILLENNIALS



GEN X



BOOMERS

EMOTIONAL RESILIENCE

DIGITAL RESILIENCE



**EMOTIONAL
RESILIENCE
BUILDING**

SELF-CARE AND THRIVING

Is there a role for your brand or product to help younger people maintain mental well-being? Can you offer tools and services, as well as support to help overcome current difficulties and grow resilience for the uncertain future?



**DIGITAL
ACCELERATION**

SKILLS AND TOOLS

Can you help equip people with skills and tools necessary to thrive in the physically-distanced digitally powered no normal context?

Offer support, advice and tools



RESILIENCE



EMOTIONAL RESILIENCE BUILDING



NETFLIX 'WANNA TALK ABOUT IT' WITH GEN Z

Netflix launched a weekly Instagram Live with celebs to address Gen Z's pandemic woes. 'Wanna Talk About It?' addressed issues like "how do we manage anxiety?" and "what self-care actually means." The show stars actors from some of Netflix's most popular teen series. [LINK](#)



GEN Z



DIGITAL ACCELERATION



O2 DIGITAL CARE PACKAGE FOR SENIORS

Telefónica Germany, O2 and the Digital Opportunities Foundation have curated a digital "corona care" package to assist seniors with their digital needs. The package offers over the phone 'O2 helpers' to advise and talk through technical difficulties. Partnering with Emporia and Huawei, tablets are also loaned to retirement homes with helpful preinstalled apps such as the Corona warning app. [LINK](#)



BOOMERS

—

FIVE DRIVERS IN THE NO-NORMAL

Values



Both in expressed importance and willingness to act**VALUES**

The Great Pause offered a unique opportunity for people to reflect on their lives and re-evaluate their priorities. The universal nature of the experience heightened a sense of unity amongst communities. Younger people, in particular, have expressed a stronger increase in societal concerns and the intention to act.



GEN Z



MILLENNIALS



GEN X



BOOMERS

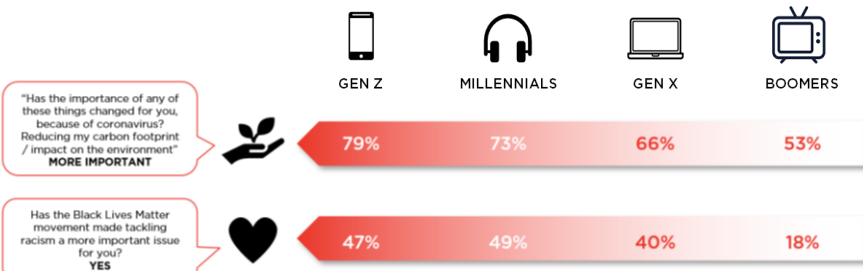
VALUES RISING IN IMPORTANCE**RISE IN ACTION**

The heightened relevance of values amongst younger generations is partly a life stage phenomenon, and partly a product of the pandemic. A perceived lack of control over the situation has augmented their desire to shape the world that they will be stepping into once the pandemic is over. This has heightened the recognition of the role of brands in helping individuals, communities and societies.

DIVIDED: ISSUES GROWING IN IMPORTANCE



Younger generations are entering the no-normal with a heightened sense of importance around environmental and societal issues.



Source: GWI, Wave 5, July 2020, [Link](#)

"These younger generations remain committed to their values and beliefs. If anything, the pandemic has reinforced their desire to help drive positive change in their communities and around the world."

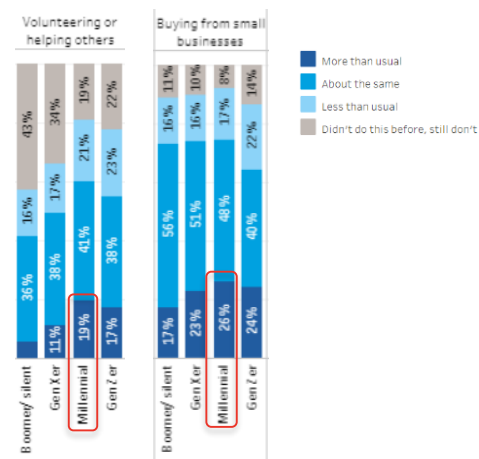
- The Deloitte Global Millennial Survey 2020, [Link](#)



DIVIDED: INCREASE IN ACTION

Younger generations, with less family responsibilities and commitments, as well as having their empathy and community spirit ignited by the pandemic, have shown higher levels of increased action or expectation to perform altruistic deeds.

To what extent are you conducting the following activities, compared to before the COVID-19 pandemic?



"Many Millennials are volunteering in their communities for the first time – for example, by helping out at food banks. With many Gen Xers needing to prioritise looking after their own families, **we will arguably see the greatest increase in action among Millennials.**"

- FF, April 2020

Source: Salesforce, July 2020, Global, [Link](#)

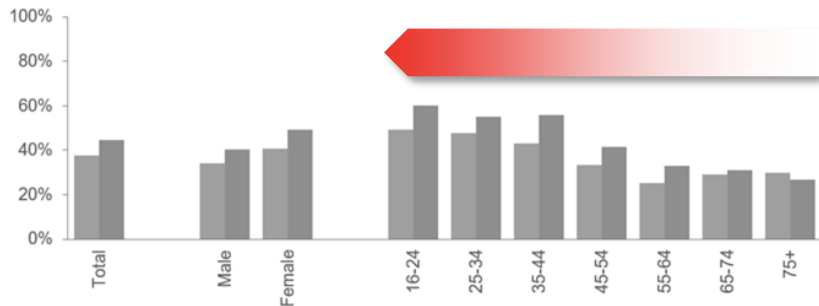
DIVIDED: RESPONSE TO COMMS MESSAGES



Younger generations display a stronger interest in businesses addressing social issues in their comms messaging.

"How strongly do you agree or disagree with the following statements?" I like it when companies/brands address current social issues in their advertising | % selecting agree or agree strongly

→ Significant increase overall and among all age groups under 65



Source: Foresight Factory | Base: 4000+ online respondents aged 16+, GB, 2020 May 26



UNITED: PERCEPTION OF BUSINESS ACTIONS

Across generations, the perception of business performance around societal issues is largely even, and predominantly positive.



Businesses are supporting communities well



Businesses are taking altruistic actions



Social initiatives by businesses are impactful

Source: Salesforce, July 2020, Global, [Link](#)

Doing business responsibly, supporting causes and communities



VALUES

A brand's commitment to having a positive impact on the environment and society is a rising purchase driver, particularly for the younger generations. They are keen to make a difference through action and that includes the brands and products they choose to buy.



GEN Z



MILLENNIALS



GEN X



BOOMERS

SUSTAINABILITY

How can you maintain your sustainability commitments and help people act on theirs, within a challenging economic environment?

DIVERSITY AND INCLUSION

How can you promote inclusion in your own business, in your sector and in society as a whole?

LOCAL COMMUNITIES

What role can your brand play in supporting local communities and helping them thrive?

Doing business responsibly, supporting causes and communities



VALUES



RAISE MONEY AND AWARENESS

[JanSport](#), a popular student backpack outfitter in the US, is running a hashtag challenge on TikTok to raise awareness for a charity group helping students affected by the coronavirus pandemic. To participate in the challenge, TikTok users video themselves emptying out a backpack and passing it to the left to the tune of Greyson Chance's 'Seasons Nineteen.' [LINK](#)



GEN Z



ACTION NOT WORDS

Unilever recently set out a new range of measures and commitments designed to improve the health of the planet by taking even more decisive action to fight climate change, Unilever will achieve Net Zero emissions from its products by 2039. To accelerate action, Unilever's brands will collectively invest €1 billion in a new dedicated Climate & Nature Fund. [LINK](#)



GEN Z



MILLENNIALS



GEN X



BOOMERS

FIVE DRIVERS IN THE NO-NORMAL

Rituals



But how much of the change is here to stay?

**RITUALS**

Everyone, regardless of age, has had to adapt their routines to lockdown living. Many have tried activities and products for the first time, and a lot of people have moved important rituals online or given them up. Although the evolution and adoption of new routines and rituals will be temporary for some, for others this will continue into the long term. This will create both opportunities and challenges for brands.



GEN Z



MILLENNIALS



GEN X



BOOMERS

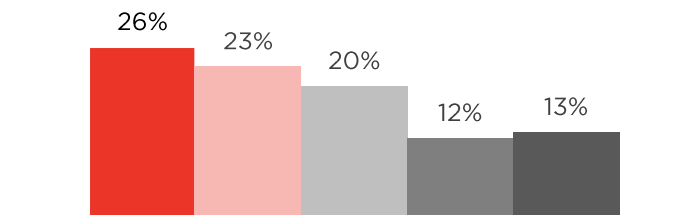
TRIAL DURING PANDEMIC**LIKELIHOOD TO MAINTAIN**

Trial and adoption of new behaviours was heaviest for the younger generations but it cannot be ignored that older generations adopted new behaviours too, particularly online, due to need. The data suggests, however, that the older generations are less likely to maintain these new behaviours. It is not easy to unlearn a lifetime of learning.

DIVIDED: NEW ACTIVITIES & PRODUCT TRIAL



Younger generations were twice more likely to try new activities as a result of the pandemic. Having less set routines and, likely, more time on their hands, a quarter of Gen Z used the time for self-improvement and experimentation – already an important focus for them pre-pandemic.



I have tried new activities

■ 16-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55-64

Source: Foresight Factory, June 2020 (UK ONLY)

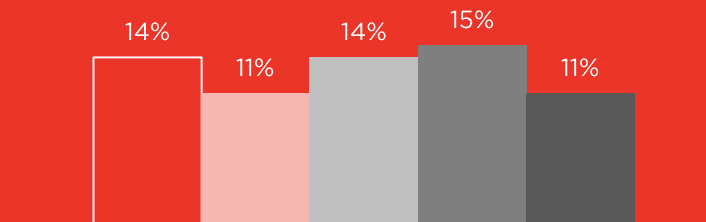
DURING COVID, YOUNG PEOPLE WERE MORE LIKELY TO MAKE NEW FIRST TIME PURCHASES.

Across the product categories we researched, **69%** of younger consumers have purchased a new product for the first time during COVID-19, compared to **43%** for older generations. (How Marketers Can Win with Gen Z and Millennials Post-COVID-19, BCG, [Link](#))



UNITED: NEW BRAND TRIAL

A fairly even, smaller share of customers, have tried new brands as a result of the pandemic. The prevalence of risk in the external environment has, perhaps, resulted in a preference for tried and tested brands in favour of experimentation.



I have tried new brands /suppliers

□ 16-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55-64

Source: Foresight Factory, June 2020 (UK ONLY)



Younger people are more likely to stick to the new routines and rituals

Younger people are both more likely to expect to continue new behaviors in the long term (**below left**) – unsurprising, given that they showed a greater interest in new activity uptake in the first place – and more likely to think that things will change overall post-pandemic. In fact, they over-index in this at nearly every measure (**below right**):

% who say they expect to do the following after the outbreak is over*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers
	%	%	%	%
Exercise at home more frequently	54	45	38	27
Shop online more frequently	51	50	49	36
Use food delivery services more frequently (e.g. Uber Eats, Just Eat, Deliveroo, etc)	31	25	15	9
Use mobile payment services more frequently	48	42	38	19
Use video calling more frequently (e.g. FaceTime, WhatsApp video, etc)	41	37	32	18
Use video conferencing platforms more frequently (e.g. Zoom, Hangouts, etc)	29	30	23	11
Work from home more frequently	31	28	25	18
None of these	7	14	21	39

Source: GWI, Wave 5, July 2020, [Link](#)

People's expectation that they will not carry on new rituals after the outbreak increases with age.

WHAT THEY THINK WILL CHANGE AFTER THE PANDEMIC

	THE WAY OUR ECONOMY OPERATES	THE WAY WE ENGAGE WITH OUR COMMUNITY	THE WAY WE SOCIALIZE	THE WAY WE WORK	THE WAY WE ADDRESS CLIMATE CHANGE	THE WAY WE RALLY BEHIND CAUSES	THE WAY WE SHOP	THE WAY WE EAT	THE WAY WE ENGAGE IN ENTERTAINMENT
GLOBAL	62%	55%	51%	47%	31%	31%	26%	21%	18%
GEN Z	61%	59%	54%	43%	34%	34%	26%	22%	20%
MILLENNIAL	63%	53%	49%	52%	30%	30%	26%	21%	18%
GEN X	54%	49%	42%	36%	25%	31%	22%	11%	11%

Source: Youth in Pandemic, VICE, [Link](#)

New rituals and new ways to maintain old rituals



RITUALS

Long held habits and rituals were forced to adapt during coronavirus. As we move out of lockdown, these rituals will either endure or revert back to previous behaviours. Regardless, these rituals provide enormous comfort. Brands and businesses on the inside of these rituals and the comfort and control they provide, will be best placed to succeed.



GEN Z



MILLENNIALS



GEN X



BOOMERS

TRIAL DURING PANDEMIC

LIKELIHOOD TO MAINTAIN

HELP MAINTAIN NEW RITUALS

HELP DISCOVER NEW RITUALS

FACILITATE NEW WAYS OF MAINTAINING OLD RITUALS

New rituals and new ways to maintain old rituals



ENCOURAGE YOUNG PEOPLE TO ADAPT

In June, Pernod Ricard launched their Holiday at Home campaign for Malibu Rum in the UK. Targeted at Gen Z, the campaign encourages people to enjoy their time at home in creative ways, such as dressing for a tropical vacation in their living room. By tagging the brand and using the hashtag #MalibuHoliday. [LINK](#)



GEN Z



MILLENNIALS



HELP SENIORS CREATE NEW, HEALTHY RITUALS

In June, Japan's National Centre for Geriatrics and Gerontology launched a free smartphone app which helps seniors to stay physically and mentally active during the pandemic. The app demonstrates 50 different exercises that can be done at home and enables the user to create walking routes to parks and other venues. [LINK](#)



BOOMERS



HELP ALL GENERATIONS TO ADJUST

Apple's new film "The whole working-from-home thing" builds upon their 3 minute 2019 film "The Underdogs", which tells the story of a multigenerational team defying the challenges of working from home together to crush a big presentation. [LINK](#)



GEN Z



MILLENNIALS



GEN X



BOOMERS

The relevance and importance of the five drivers to all generations is evident in this cross-generational analysis, and yet **some of the drivers appear to be more relevant and significant to specific generations**, especially at this particular moment in time.

FIVE DRIVERS THAT MATTER TO ALL GENERATIONS

But some appear to be more universal than others



RISK



OPTIMISM



RESILIENCE



RITUALS



VALUES

UNIVERSAL DRIVERS ACROSS GENERATIONS

Displaying equal importance for all
age groups, with minor nuances

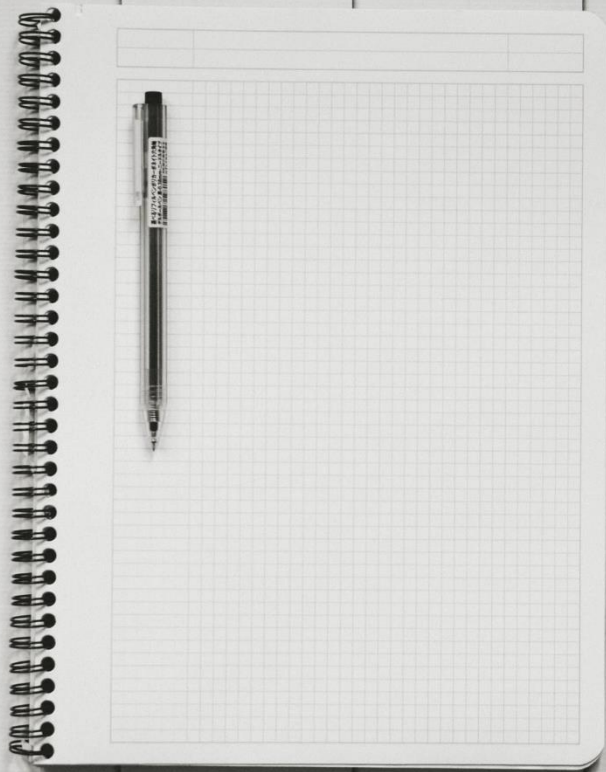
DRIVERS WITH EQUAL IMPORTANCE

But with varied manifestations for
different generations

HEIGHTENED IN THE CONTEXT OF COVID

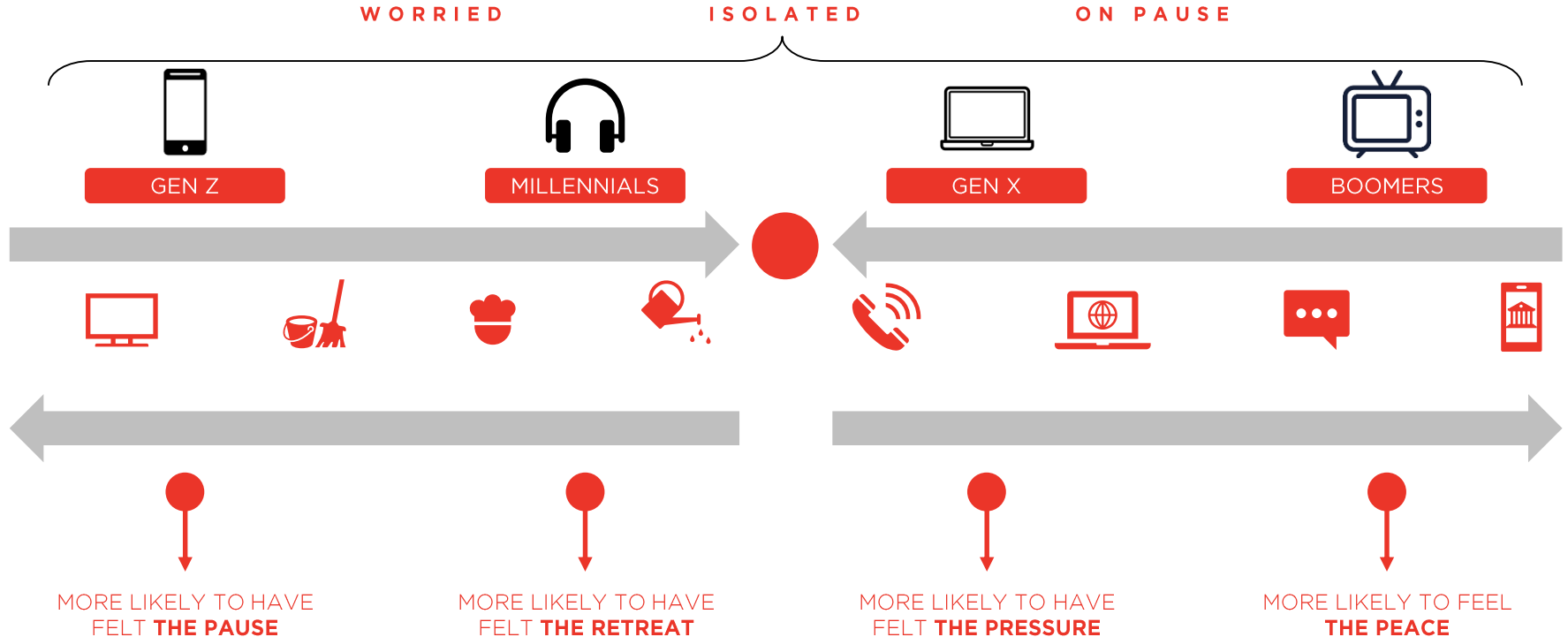
Global issues seem to resonate
stronger with younger people,
though values related to local
communities span all

SUMMARY



WE ALL WENT THROUGH LOCKDOWN

A unifying experience, that also uncovered essential differences in emotional impact



An existence that reinforces the fundamentals of the experience that united us



UNITED



GEN Z



MILLENNIALS



GEN X



BOOMERS

HEALTH CONCERNS

PERCEPTION OF RISK

NEED FOR CONTROL

INCREASE NEED FOR POSITIVITY

SLOW RETURN TO DISCRETIONARY SPEND

SHIFT ONLINE

BUT THE IMPACT THE PANDEMIC HAS HAD ON US VARIES

With younger people experiencing a stronger impact overall



DIVIDED



GEN Z



MILLENNIALS



GEN X



BOOMERS

FINANCIAL IMPACT & RISK

DISRUPTION

OVERALL CONCERN ABOUT THE PANDEMIC

LEVELS OF OPTIMISM

DIGITAL RESILIENCE

IMPORTANCE OF SOCIETAL ISSUES

TRIAL OF NEW ACTIVITIES AND PRODUCTS

EXPECTATION TO MAINTAIN NEW HABITS

HEALTH RISK

EMOTIONAL RESILIENCE

This visual summary of the impact of the pandemic, illustrates the variety and intensity of the experience, as lived by different generations.

This experience will continue to influence behaviour and attitudes.

As a rule, younger people have experienced a stronger rise or decline in attitudes and behaviours around the 5 emotional drivers. They are adapting more readily, or quite simply because they have to, to their circumstances.

Many commentators highlight the significance of the opportunity around these younger generations.

“ Younger consumers have experienced some of the greatest changes in their patterns of consumption, and they will lead the charge as these shifts extend through society. Marketers should target these generations and act now to adjust to the new paradigm—or risk missing out on a once-in-a-generation opportunity.”

— *BCG, How Marketers Can Win with Gen Z and Millennials Post-COVID-19, [Link](#)*

It's predicted that the formative power of this event and its impact on the younger generations' future should not be under-estimated...

but as our analysis shows, the legacy of impact **will play out for all, and these cross generational shifts should not be ignored in favour of one, more attractive generational opportunity.**

Future generational research will look back at the pandemic as the event which both united our behaviours and highlighted the divide in our psychology.

Every generation has had to unlearn, learned behaviours, and every generation has experienced a shift, meaning **their relationships and rituals are being reconsidered offering brands a renewed opportunity to connect.**

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BBDO KNOWS offers thinking, strategy, insights and inspiration on key categories, key themes and consumer segments.

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