YOUTH IN PANDEMIC: THE KIDS ARE NOT ALRIGHT

The evolution of youth’s attitudes and behaviors and how brands can help shape the future

insights from

information desk

VICE media group
VICE Media Group is tracking the evolution of youth’s attitudes and behaviors over time to determine the pandemic’s lasting impact on the world.

Online quantitative studies were fielded via VICE, Refinery29, and i-D websites and social channels to track youth’s responses to the COVID-19 pandemic.

Additional qualitative questions fielded to VICE Media Group’s proprietary insights communities, VICE Voices and Mad Chatter.
THE FUTURE AIN’T WHAT IT USED TO BE
Youth predict monumental societal shifts, especially in how we engage with the economy and each other.

Q: What do you imagine will be the most lasting societal change after this pandemic?

<table>
<thead>
<tr>
<th>Category</th>
<th>March (%)</th>
<th>June (%)</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Way We Work</td>
<td>47%</td>
<td>62%</td>
<td>+15ppts</td>
</tr>
<tr>
<td>The Way We Socialize</td>
<td>51%</td>
<td>60%</td>
<td>+9ppts</td>
</tr>
<tr>
<td>The Way Our Economy Operates</td>
<td>56%</td>
<td>62%</td>
<td></td>
</tr>
<tr>
<td>The Way We Engage With Our Community</td>
<td>53%</td>
<td>55%</td>
<td></td>
</tr>
<tr>
<td>The Way We Shop</td>
<td>26%</td>
<td>40%</td>
<td>+14ppts</td>
</tr>
<tr>
<td>The Way We Engage in Entertainment</td>
<td>18%</td>
<td>37%</td>
<td>+19ppts</td>
</tr>
<tr>
<td>The Way We Rally Behind Causes</td>
<td>26%</td>
<td>31%</td>
<td>-5ppts</td>
</tr>
<tr>
<td>The Way We Address Climate Change</td>
<td>25%</td>
<td>31%</td>
<td>-6ppts</td>
</tr>
<tr>
<td>The Way We Eat</td>
<td>21%</td>
<td>25%</td>
<td></td>
</tr>
</tbody>
</table>
Q: Do you feel Coronavirus will have a positive or negative long-term impact on society and culture?

The global impact of these changes remains uncertain.
Q: Do you feel Coronavirus will have a positive or negative long-term impact on society and culture? (US-only)

In the US, the future looks bleak.

- **MARCH**
  - 42% Positive
  - 58% Negative

- **JUNE**
  - 41% Positive
  - 59% Negative

- **SEPTEMBER**
  - 33% Positive
  - 67% Negative

Sources: Youth in Pandemic: Check in I; Youth in Pandemic: Check in II
Around the world, hope for a better future is deteriorating.

How would you describe your emotions today compared to an average day before COVID-19?

% answering high/very high

- MARCH: 36%
- JUNE: 26%

Sources: Youth in Pandemic: Check in I; Youth in Pandemic: Check in II

"[My overall state of wellbeing is a 1/10 due to] racism, COVID-19, job loss, the struggle with the state of the world."

MILLENNIAL WOMAN, CANADA
They see a future plagued with fear and lost opportunity.

Fear without end

I work in a school that is open 5 days per week and all students are in school, no remote learning. It feels as though it's inevitable that I will get sick. I feel hopeless in every aspect of my life. I don't feel like anything is going to get better any time relatively soon. And I am having a really difficult time adjusting to our "new normal".

MILLENNIAL WOMAN, US

Dreams derailed

The longer we go in the year, the more I feel the virus' impact on almost every aspect of life. And it sounds like a second wave will be coming.

MILLENNIAL WOMAN, US

Not knowing when Covid will come to some sort of end and when we will all be some kind of safe again.

MILLENNIAL WOMAN, UK

Plans have all been scuppered both short and long-term with regards to my career, my personal dreams, my relationship. Dating will be so different in the future and that makes me less hopeful for finding a partner and having children when I had planned.

GEN Z WOMAN, CANADA

The coronavirus makes it less likely that my family, friends, and myself will survive into the future. Climate change threatens any human future at all. Not worth it to have kids or a career. Just trying to enjoy life one day at a time.

MILLENNIAL WOMAN, US

Sources: Youth in Pandemic: Check in I; Youth in Pandemic: Check in II
They’ve lost faith in leadership and one another.

**Distrust in government**

"I don't trust the government to help or make good decisions regarding the pandemic, millions are still out of work and there's no additional financial help, crime is increasing, police are still killing unarmed black people, Trump is trying to discredit the election, the country seems to be heading towards a more fascist state.

MILLENNIAL WOMAN, US"

"The government’s lack of direction in leading the country through the pandemic

MILLENNIAL MAN, UK"

"The current political climate does not foster hope for younger generations. We've been shown time and time again that we want change but it will never come through our elected representatives.

MILLENNIAL MAN, US"

**Distrust in one another**

"Realizing how many people in this country simply cannot be bothered to care about other people has made me less hopeful than ever about our future. How can we address huge, systemic, serious issues like racial injustice, climate change, or voting rights when we cannot even get people to put a freakin mask on their face when they go to the store to keep their neighbors from DYING?!?

MILLENNIAL WOMAN, US"

"No one is coming to save us and I'm not sure we are willing or able to save ourselves.

MILLENNIAL MAN, US"

"The change in people’s attitudes from helping each other to only caring about themselves.

GEN Z WOMAN, UK"

Sources: Youth in Pandemic: Check in I; Youth in Pandemic: Check in II
WE’RE IN THE MIDST OF A MENTAL HEALTH CRISIS

Brand need: Help consumers take care of themselves.
The initial shock of COVID-19 has subsided, but youth still feel overwhelmed.

How would you describe your emotions today compared to an average day before COVID-19?

<table>
<thead>
<tr>
<th>% answering high/very high</th>
<th>MARCH</th>
<th>JUNE</th>
<th>US in Sept.</th>
</tr>
</thead>
<tbody>
<tr>
<td>FEAR</td>
<td>55%</td>
<td>40%</td>
<td>44%</td>
</tr>
<tr>
<td>OVERWHELM</td>
<td>-15ppts</td>
<td>45%</td>
<td>62%</td>
</tr>
</tbody>
</table>

Sources: Youth in Pandemic: Check In I, Youth in Pandemic: Check In II
Their fear has shifted from the virus to their mental health.

Which of the following causes you the most fear/anxiety?

- A friend or family member getting the Coronavirus (MARCH: 65%, JUNE: 39%, -26pts)
- Getting the Coronavirus myself (MARCH: 43%, JUNE: 26%, -17pts)
- My emotional/mental health (MARCH: 38%, JUNE: 52%, +14pts)

Sources: Youth in Pandemic: Check in I Youth in Pandemic: Check in II
Mental health has become a chronic struggle for many.

How would you describe your emotions today compared to an average day before COVID-19?

% answering high/very high

<table>
<thead>
<tr>
<th>Emotion Level</th>
<th>March</th>
<th>June</th>
</tr>
</thead>
<tbody>
<tr>
<td>Depression</td>
<td>30%</td>
<td>40%</td>
</tr>
<tr>
<td>Anxiety</td>
<td>52%</td>
<td>54%</td>
</tr>
<tr>
<td>Stress</td>
<td>56%</td>
<td>58%</td>
</tr>
</tbody>
</table>

US in Sept.

Sources: Youth in Pandemic: Check in I; Youth in Pandemic: Check in II

Self-Care Tips for Black People Who Are Really Going Through It Right Now

1,315% above benchmark
Our wellbeing will depend on our mental and emotional health.

#1 Emotional wellbeing will be the most important aspect of health & wellness after COVID-19.
Youth are recognizing the need for self-care and implementing it.

Have you taken any of the following actions in order to stay connected and maintain your wellbeing?

Sources: Youth in Pandemic: Check in I; Youth in Pandemic: Check in II

<table>
<thead>
<tr>
<th>Action</th>
<th>March</th>
<th></th>
<th></th>
<th>June</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added or increased a meditation practice</td>
<td>12%</td>
<td>+6 ppts</td>
<td>+11 pptsLATAM</td>
<td>18%</td>
</tr>
<tr>
<td>Spoke to a coach or therapist</td>
<td>3%</td>
<td>+10 ppts</td>
<td>+14 pptsLATAM</td>
<td>13%</td>
</tr>
<tr>
<td>Downloaded or increased my use of a mental health app(s)</td>
<td>6%</td>
<td>+5 ppts</td>
<td>+6 pptsAPAC</td>
<td>11%</td>
</tr>
</tbody>
</table>

SELF-CARE NET SCORE:

- March: 17%
- June: 30%
- Increase: +13 ppts
OUR RELATIONSHIPS ARE AT STAKE

Brand Need: Provide tools for meaningful and safe experiences.
Physical separation has left young people feeling lonely and disconnected.

How would you describe your emotions today compared to an average day before COVID-19?

% answering high/very high

- MARCH
- JUNE

LONELINESS

-36%
-46%

CONNECTION

-28%
-39%

-61% US in Sept.

Sources: Youth in Pandemic: Check in I; Youth in Pandemic: Check in II

I miss my friends very much - the social contact like being able to hold each other.

- GEN Z WOMAN, CANADA
They are worried about the status of their relationships.

Young people are 2x more likely to be feeling fearful / anxious about their relationships in June 2020 compared to March 2020.

*Quarantine Might Be Ruining Your Relationship. Here’s How To Save It*

1,659% above benchmark

Source: Youth in Pandemic: Check in I; Youth in Pandemic: Check in II

"[My overall state of wellbeing is poor because I have] no social life, college graduation getting ruined, my relationship being rocky."

GEN Z WOMAN, US
Virtual experiences have kept them connected throughout the pandemic.

Have you taken any of the following actions in order to stay connected and maintain your wellbeing?

<table>
<thead>
<tr>
<th>Action</th>
<th>March</th>
<th>June</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased the amount I use social media</td>
<td>47%</td>
<td>45%</td>
</tr>
<tr>
<td>Reached out to someone I haven't spoken to in a while</td>
<td>31%</td>
<td>38%</td>
</tr>
<tr>
<td>Hosted or joined a virtual hangout</td>
<td>22%</td>
<td>34%</td>
</tr>
<tr>
<td>Created a new group chat or chain</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>Downloaded or increased my use of a dating app(s)</td>
<td>6%</td>
<td>11%</td>
</tr>
</tbody>
</table>

**RE-CONNECTION NET SCORE:**

- **March:** 70%
- **June:** 73%

Sources: Youth in Pandemic: Check In I; Youth in Pandemic: Check In II
Virtual connection is not a direct replacement for in-person connection.

I don’t know how long it’ll be before I see friends or family again. I also haven’t touched a person in almost three months, and I don’t know when I will again, which is really strange.

- MILLENNIAL WOMAN, IRELAND

WELLBEING SCORE: 5/10

I live alone, work from home and I haven’t seen anyone I know in weeks.

- MILLENNIAL MAN, BRITAIN

WELLBEING SCORE: 2/10

I miss my boyfriend, who is in France. I have not seen him since February and I do not know when we’ll meet again.

- MILLENNIAL WOMAN, ITALY

WELLBEING SCORE: 5/10

So hard to get motivated to exercise in lockdown. Have tried my dance studio’s online classes but it’s not the same as in person.

- MILLENNIAL WOMAN, AUSTRALIA

WELLBEING SCORE: 5/10

Sources: Youth in Pandemic: Check in II
No matter how much they miss it, returning to social experiences induces anxiety.

How do you feel about returning to social experiences when social-distancing mandates are lifted?

- **49%** Excited
  - 38% NA
  - 56% APAC
- **20%** Nervous
  - 24% NA
  - 18% APAC
- **31%** Hesitant
  - 38% NA

60% of young people foresee themselves experiencing **social anxiety** as things reopen

Sources: Menu for the Post-COVID Future; Youth In Pandemic Check-in II

How to Gracefully Ask for a Little Space—Or Just Say 'No'—During a Pandemic

144% above benchmark
They’ll seek closer romantic relationships.

They’ll bring entertaining home.

They’ll prioritize their favorite places.

Social experiences will be reserved for the most meaningful people and places.

64% of those single & dating will seek more meaningful connections after the pandemic.

(35% will be less open to flings)

7 in 10 feel most comfortable getting together with a few people at someone’s home after restrictions are lifted.

(#1 social experience they’re most comfortable with)

TOP 3

The Top 3 places they’re most excited to return to:

1. Their favorite bars
2. Their favorite neighborhood restaurants
3. Their go-to coffee shops

Isolation and quarantine has helped me see who my real friends really are and who actually wants to be in my life and whose attention I was just chasing after.

- GEN Z MAN, UNITED STATES

I will go out with who I consider important.

- GEN Z MAN, ITALY

My husband and I have had a chance to reconnect and have more meaningful in-depth conversations throughout the day.

- MILLENNIAL WOMAN, CANADA

Sources: Youth in Pandemic: Check in I; Youth in Pandemic: Check in II; Menu for the Post-COVID Future
WE’RE BORED OUT OF OUR MINDS

Brand Need: Entertain us, please.
Boredom has become the norm.

How would you describe your emotions today compared to an average day before COVID-19?

% answering high/very high

- **MARCH**
- **JUNE**

"Quarantine has been a calm, relaxing time for me... but also lonely - nothing to do, a lot of boredom and therefore no force to move.

- GEN Z WOMAN, GERMANY

"[My wellbeing is suboptimal due to] the repetitiveness of my days, boredom and fatigue.

- GEN Z WOMAN, ITALY

Sources: Youth in Pandemic: Check in I; Youth in Pandemic: Check in II
## Entertainment is the go-to cure for quarantine boredom.

Have you taken any of the following actions in order to stay connected and maintain your wellbeing?

<table>
<thead>
<tr>
<th>Action</th>
<th>March</th>
<th>June</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participated in online gaming</td>
<td>28% (37% Men; 19% Women)</td>
<td>29% (39% Men; 20% Women)</td>
</tr>
<tr>
<td>Downloaded a new social media app(s)</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>Subscribed to a new streaming service(s)</td>
<td>14%</td>
<td>23%</td>
</tr>
<tr>
<td>Attended a virtual concert or event</td>
<td>13%</td>
<td>22%</td>
</tr>
</tbody>
</table>

**Entertainment Net Score:**

50% in March vs 59% in June, an increase of +9 ppts

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**Games To Play Online With Your Friends While We’re All Stuck At Home**

1,127% above benchmark

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Sources: Youth in Pandemic: Check in I; Youth in Pandemic: Check in II
This increased reliance on at-home entertainment will become ingrained in culture.

<table>
<thead>
<tr>
<th>Top Predictions for Gaming</th>
<th>Top Predictions for Shows/Movies</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>MORE PEOPLE WILL VIEW GAMING AS A WAY TO STAY CONNECTED WITH OTHERS.</strong> #1</td>
<td><strong>EVERYONE WILL HAVE AT LEAST ONE STREAMING SERVICE IN THEIR HOME.</strong> #1</td>
</tr>
<tr>
<td><strong>GAMING WILL BECOME AN EVEN BIGGER PART OF CULTURE.</strong> #2</td>
<td><strong>MOST PEOPLE WILL HAVE MULTIPLE STREAMING SERVICES IN THEIR HOMES.</strong> #2</td>
</tr>
<tr>
<td><strong>PEOPLE WILL PLAY MORE GAMES, PERIOD.</strong> #3</td>
<td><strong>THE WAY SHOWS/MOVIES ARE RELEASED TO THE PUBLIC WILL CHANGE.</strong> #3</td>
</tr>
</tbody>
</table>

Sources: Spotlight on the Future of Entertainment
WE LACK PURPOSE

Brand Need: Help us find meaning in our daily lives.
Youth feel unfilled.

How would you describe your emotions today compared to an average day before COVID-19?

% answering high/very high

- MARCH
- JUNE

PURPOSEFULNESS

EMOTION LEVEL AT NORMAL

-36%  -40%

-46%

US in Sept.

"I have everything I need, but lack a sense of purpose and fulfillment."

- MILLENNIAL WOMAN, US

Sources: Youth in Pandemic: Check in I; Youth in Pandemic: Check in II
Creativity has helped them discover a new sense of purpose.

Have you taken any of the following actions in order to stay connected and maintain your wellbeing?

<table>
<thead>
<tr>
<th>Activity</th>
<th>March</th>
<th>June</th>
</tr>
</thead>
<tbody>
<tr>
<td>Experimented with new recipes</td>
<td>28%</td>
<td>48%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>+20 ppts</td>
</tr>
<tr>
<td>Taken up or gotten back to a hobby</td>
<td>31%</td>
<td>39%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>+8 ppts</td>
</tr>
<tr>
<td>Learned a new skill</td>
<td>18%</td>
<td>29%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>+11 ppts</td>
</tr>
</tbody>
</table>

Sources: Youth in Pandemic: Check in I; Youth in Pandemic: Check in II

CREATIVITY NET SCORE: 54% → 69% +15 ppts

People All Over the World Are Making Frothy ‘Dalagona’ Coffee, Thanks to Quarantine

6,860% above benchmark

AS SEEN ON VICE
They’re tapping creativity to enrich all aspects of life.

54% Are making adjustments to their home during lockdown

35% Get more creative with the home space
27% Start home repairing
24% Start a new home project

1 in 4 Are playing / wanting to play more creative / arts games
20% Believe that more people will view gaming as a source of creativity after COVID-19.

1 in 3 Describe their current relationship with food as "creative."

45% Will be more open to creative ways of dating after the pandemic

Brands Are Giving Away Their Secret Recipes Because of Coronavirus

1,207% above benchmark

Sources: Youth in Pandemic: Check in I; Youth in Pandemic: Check in II; Menu for the Post-COVID Future; Spotlight on the Future of Entertainment: Re-imagining home
## New Directions

There has been a drastic shift in how consumers feel, which is starting to permanently impact how they live their lives. We believe brands can help them through this moment and into a better future.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>01</strong></td>
<td>With the future unknown and hope diminishing, help young people focus on what they can control here and now.</td>
</tr>
<tr>
<td><strong>02</strong></td>
<td>Be mindful of emotional wellbeing in all things you do - from products and services to corporate policies. Self-care will be the driving force behind many consumer decisions.</td>
</tr>
<tr>
<td><strong>03</strong></td>
<td>Enhance the virtual experiences that are here to stay, and help make in-person interactions even more meaningful.</td>
</tr>
<tr>
<td><strong>04</strong></td>
<td>Find new ways to entertain - topics, formats, distribution, etc.</td>
</tr>
<tr>
<td><strong>05</strong></td>
<td>Cultivate creativity within the company and among consumers to help people find purpose and meaning in their daily lives.</td>
</tr>
</tbody>
</table>
Content Integration Opportunities

Content Partnership Opportunities

VICE media group
N.A. Brand Strategy
LOOKING AHEAD TO A POST-PANDEMIC WORLD, WE SEE FIVE MAIN CATEGORIES THAT WILL BE IMPACTED

- Health & Wellness
- Entertainment
- Tech & Telecom
- Home
- Food & Beverage
Mental health has never been more important

COVID-19 has caused more than just a physical health crisis, it has brought about a mental health crisis as well.

Emotional wellbeing is the #1 most important aspect of health & wellness after COVID-19 (+13% over the course of the pandemic)

VICE Media Group can position your brand as a tool to help them take care of their mental health.

**VICE Guide to Healthcare**
To help audiences take care of themselves, we’re bringing a practical, honest, and no-BS guide to navigating insurance, care, and well-being. Spanning expert advice, how-to’s, and first-hand storytelling, we’ll provide the resources they need to access the wellness tools to help prep them for the future.

**R29 Shelf Care**
While audiences hold off on relationships to take care of themselves, we can showcase your brand as the self care tool they need to incorporate into their daily routine as we explore how the things on our shelf can soothe and create a sense of normalcy in tumultuous times.
Streaming will become universal

Even the last holdouts to the streaming revolution are being converted, solidifying the power of streaming for entertainment brands.

#1

The top prediction for shows & movies is that everyone will have at least one streaming service in their home.

VICE Media Group can help your title stand apart among all other streaming options. We’ll make your show/movie the must-see for our streaming savvy audience.

VICE Entertainment Update

We’ll highlight your title in the VICE Entertainment Update, our weekly report on all things culture, including show premieres, music drops, award shows and the most highly anticipated movie releases.

R29 The Mention

We’ll make your latest release a part of our weekly Live chat show, The Mention. R29 editors can get fans excited about your premiere by teasing the show’s themes and talking about its stars, while driving viewers to stream on your platform.
Virtual connection is here to stay

Audiences have unlocked new ways to virtually connect. After the pandemic, we can expect to see these habits continuing.

73%

Have used social media, apps and other virtual ways to keep them connected throughout the pandemic.

VICE Media Group can show how your tech products are powering the new way we connect.

VICE The New Normal

Our daily lives have changed. The New Normal captures the massive shifts happening in our homes, families and throughout society right now. We can show how your tech product is powering these shifts and giving us a new sense of normalcy.

R29 Single Files

Virtual connection is a pivotal part of dating. We'll showcase how your product is powering connection in this time in Single Files, personal essays of what the single life looks like. We'll explore people's experiences and how they've used technology in new and interesting ways to form relationships.
Home is an investment in yourself

We used to have other spaces to occupy our time. Now, with most of our time spent at home, audiences are more eager to invest in creating a space that reflects their style, comfort and creativity.

54%

Are making adjustments to their home during lockdown

VICE Media Group can make your brand the go-to destination to find the products they need to make their home a place of comfort.

**VICE Motherboard Makerspace**

MOTHERBOARD is partnering with influencers to guide viewers through simple, useful DIY tutorials filmed in their own homes. Using products from your brand, these influencers will show users how to remake their home spaces to meet their tech needs.

**R29 Sweet Digs**

We give viewers a peek inside the homes of the coolest women we know. We’ll position your brand as their trusted resource that helped bring their design vision to life and created at-home oases for relaxation.
A new generation of chefs

Previously thought of as a generation without the cooking skills of their parents, young people have taken the time at home to learn skills and recipes they’ll use for a lifetime.

+20%

More young people have said they have experimented with new recipes since the start of pandemic (28% in March vs. 48% in June)

VICE MUNCHIES How To

Our hit series, MUNCHIES How To, features the world’s leading chefs showing off their skills and their personality. We can integrate your product within one of their masterful creations.

R29 Money Diaries

In R29’s fan favorite series, Money Diaries, we ask our users to anonymously report on how they spend their hard-earned money. We’ll show how much they spend on your product and other ingredients to be featured in the dishes they’re making for the week.
THANK YOU