

Pray for Wuhan!!!

Under the epidemic: the young generation

Let's hold our hands
together fighting
against the epidemic!

It's gonna be OK!

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**Research background and
implementation review**



Research background and objectives

According to the theory of intergenerational, major events that a generation experiences together can exert indelible influence on the behavioral patterns of the generation.

In the Chinese Lunar New Year of 2020, post-90s and post-00s who are called 'Foxi' or "Buddha-style" together witness the outbreak of COVID-19, which is an event they've concerned themselves more with than Wenchuan earthquake in 2008. And SARS in 2003, busy in "Classroom in the Air," they had not yet formed a strong sense of crisis or perception of uncertainty.

After the epidemic, will these youngsters carry on their "Buddha-style" attitudes, like "it's fine to having something or not, and there is no need to pursue or win anything," ? Or, will they adjust their mode of behavior with rising sense of crisis?

In view of this, Ipsos conducted a survey 'Under the epidemic: the young generation,' so as to probe into changes of young people's mentality, daily activities, consumer behavior and pursuit of value during and after the epidemic.



Changes in the mentality and behavior of young people before, during and after the epidemic

Before the epidemic

Their value and living status?



Pursuit of value and living status

- Life style
- Pursuit of value

During the epidemic

Their action



Mentality and activity

- The channel and contents, during the epidemic, they got information
- Consumption, entertainments, learning behavior

After the epidemic

Their changes



Value exploration and self-planning

- Asset allocation
- Career choice
- Family investment
- Public participation

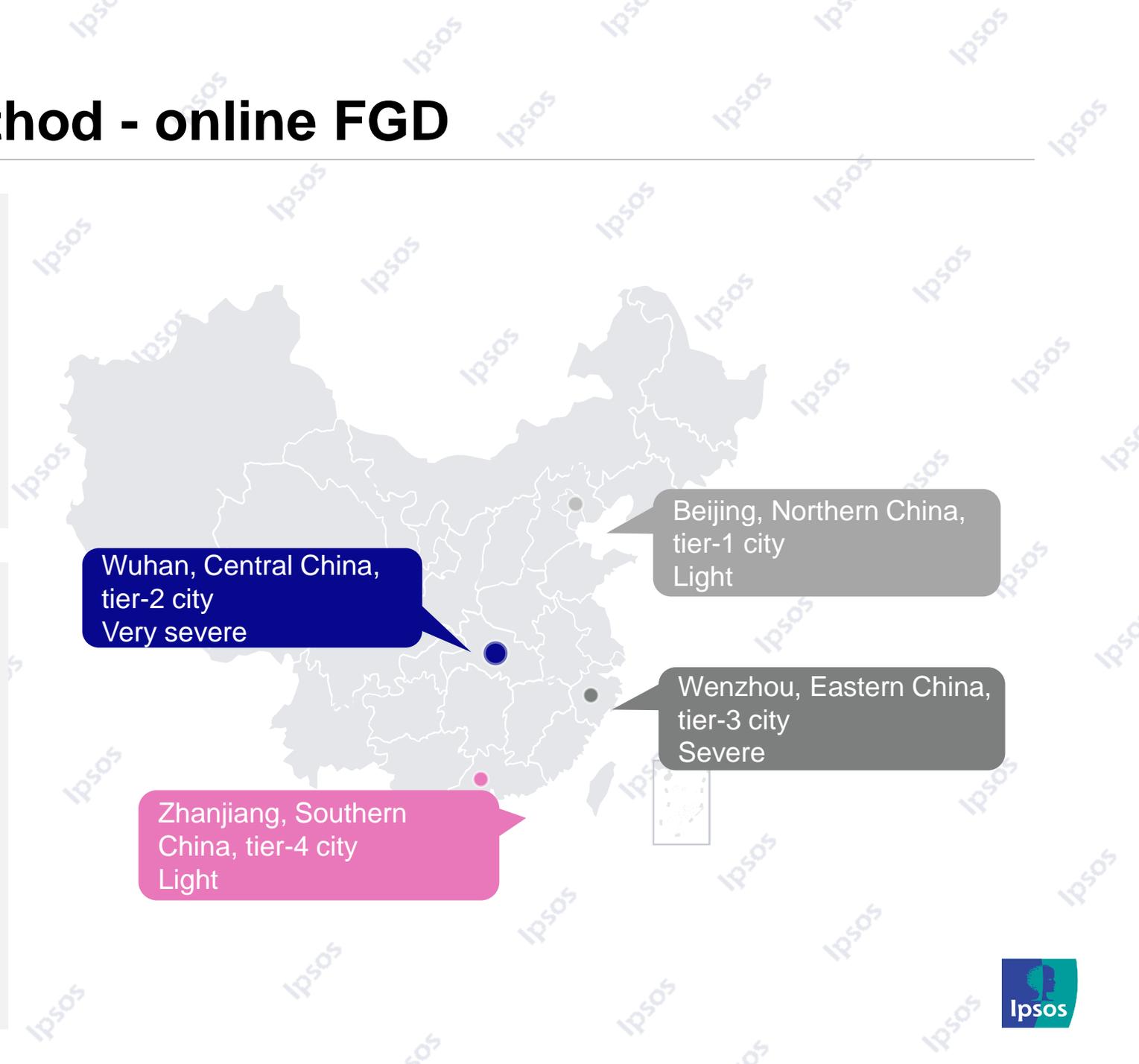
Qualitative research method - online FGD

Method

- FGD – focus group discussion
- Duration: 120 minutes per FGD
- Number of qualified respondents: 5 per FGD

Sample size

- Age: 18-30
- Education background: college degree or above
- Try to cover employees of public institutions, private enterprises, foreign companies, and SMEs
- Actively followed the epidemic information in the past month and obtained information through 3 channels at least



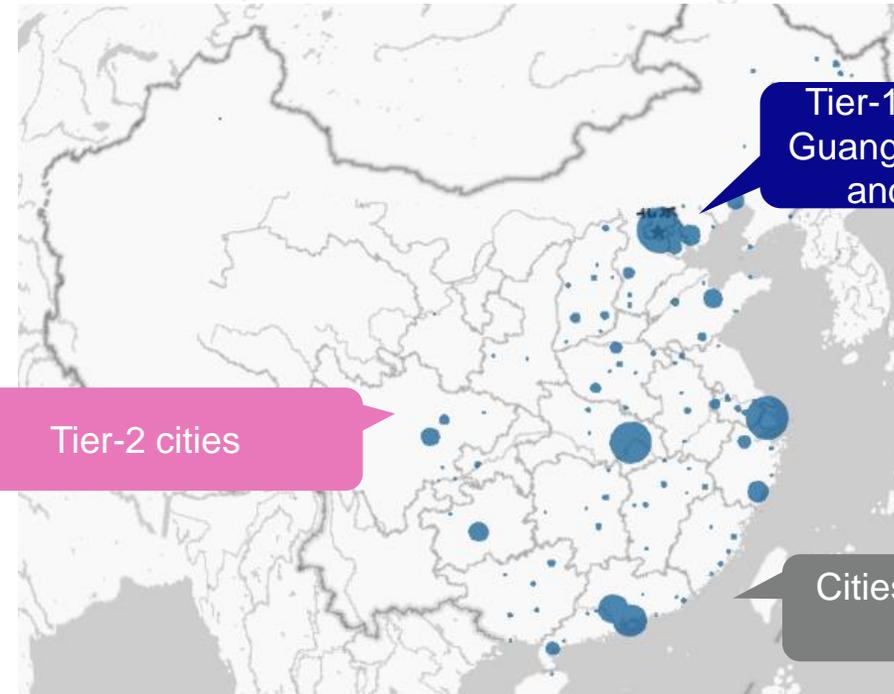
Quantitative research method - online survey

Method

- Online survey
- Duration: within 10 minutes
- Sample size: 923

Sample design

- Age: 18-30
- Gender: F:M 50%:50%
- Region: tier-1 cities (Beijing, Guangzhou, Shanghai and Shenzhen)
- Tier-2 and tier-3 cities: Wuhan, Weifang, Zhanjiang, Xiaogan, Wenzhou, Nanyang, Guilin, Mianyang, Jinzhou, Tangshan, Linfen, etc.



/02

Key findings and conclusions



Key conclusions – proper entertainments, rational planning, heartfelt voicing



Consumption

Consumption will rebound shortly after the epidemic, but unlike pleasure-oriented consumption, **it stresses investment in health management and long-term planning.**



Wealth management

As their anti-risk awareness rises, the “the invisible poor” set out to plan for their asset allocation in insurance and savings after the epidemic for “financial security”.



World view

They show a strong enthusiasm for public affairs, speak for weak on social networks more actively, seek for social supervision, and refuse to be a “disaster bystander”.

/03

A day in the epidemic

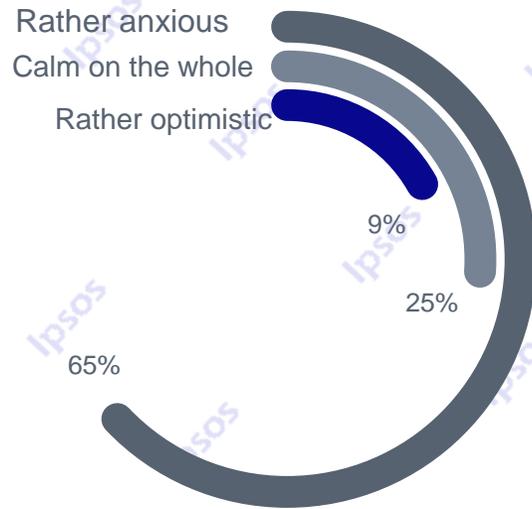


10am

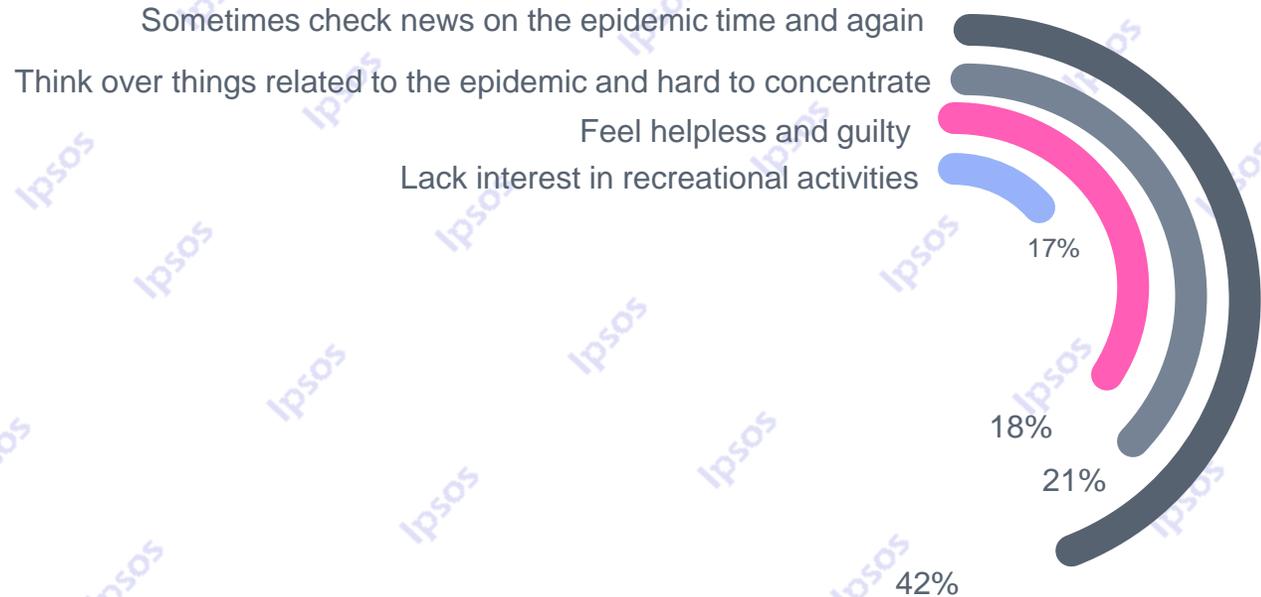
On the morning of an ordinary epidemic day, a little anxiety is even brought to reality from online public opinion, and it takes courage to get out of bed.

Browsing epidemic information has become a part of life, but it is still hard to resolve anxiety

- More than 60% of young people are still anxious about the epidemic, and glancing over the data has become one of their daily "job". Nearly 20% even find it impossible to concentrate on what they should do



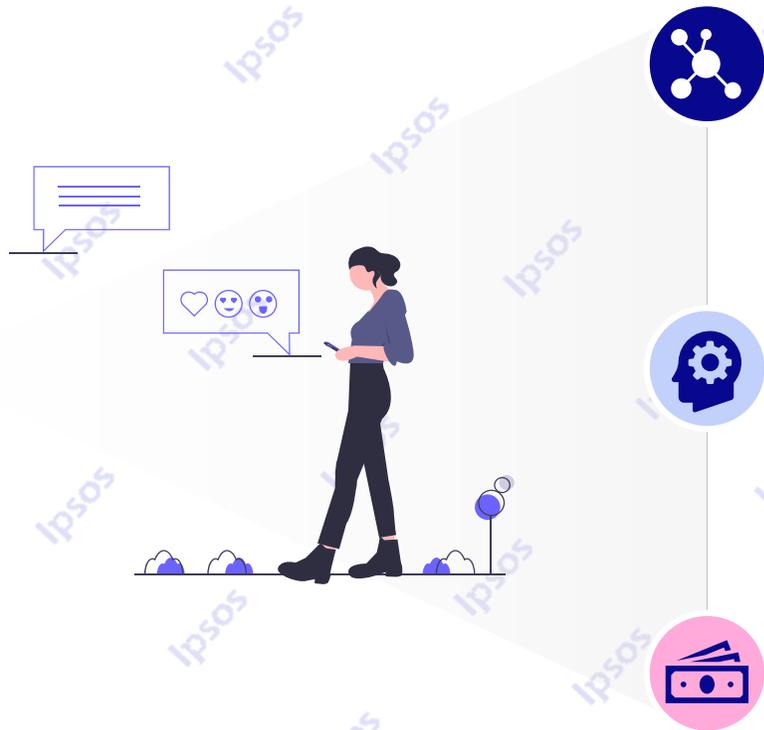
Views and emotions



Psychological status

Staying up late and refusing to get up early, life without stress and overly free makes them restless

- Over 60% worry about their life after the epidemic: “overly free,” “hard to get down to work,” explains why they are so anxious.



Freedom can also be a burden



Worry about stagnated personal progress

Restless without pressure



Worry about the degradation of work and learning ability

Anxiety of those living from paycheck to paycheck



Worry about more direct economic losses and financial impact

11am

The day during the epidemic definitely starts at noon. Turn on mobile phone, whether it is popover or push, and click on the real-time **dynamic report of the epidemic**

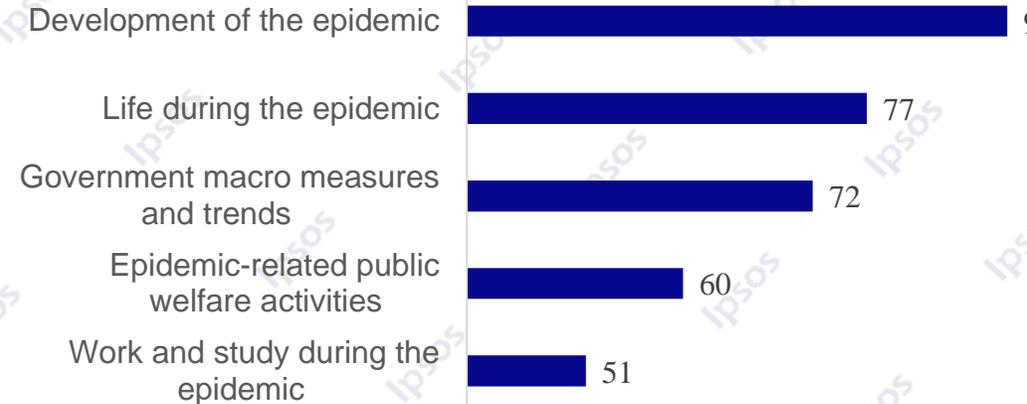
Receive the latest news on the epidemic at high frequency and via multiple channels

WeChat is the most commonly used tool, followed by news app and Weibo



Information of interest

Most concerned about the spread of the epidemic and how to maintain a normal life



Channels of getting information

Information viewing frequency

80% view relevant information at least three times a day



Seek the truth, screen the fake messages

- They stress the “authenticity” of the information, and based on their own judgement, are more alert to “rumors”.



Cross-validation of multi-platform information



Consistent information in multiple channels

More rational message judgment = multiple opinion inputs + autonomous and reasonable inference



Multi-view input, full logical information integration

Seeing is believing



Scenario construction and restoration

bilibili.com once again goes viral; user loyalty will be further strengthened after the epidemic

- Instead of being a mere “place of ACGN,” bilibili.com continues to overstep the bounds and becomes a significant information source and pan-entertainment platform for young people in the epidemic
- It is expected that after the epidemic, its user stickiness and loyalty is to be intensified, with impressive realizing ability



Why is bilibili so attractive?

1. Clear stand and attitude
2. Keep to quality content production and promotion

12am

After checking the epidemic data, Tik Tok can be a good choice to relieve the anxiety...



Thanks to the technology, “compulsory” stay at home is not boring

- The epidemic has disrupted the original plan for the holiday. **Online entertainment, online education, online bodybuilding**, and “yunbengdi” (cloud disco dancing) ensure a vibrant “holiday” for young people
- "Forced stay at home" + "abundant idle time" = "**Live streaming marketing**" new users

New plans in the epidemic

Watch videos at home 73%

Learn at home to "charge" 53%

"Online" fitness at home 37%

Play games at home 52%



Plans before the epidemic

55% Dine with family / friends

54% Go to the cinema

65% Shopping

21% Save money, stay at home

21% Prepare for exam at home

16% Do exercises

"I didn't know we could chat via Douyin (TIK TOK) MIC until my brother-in-law and my husband did so recently, when they tried to figure out how the epidemic went on the other end of the MIC and how they killed time."

"My husband started to buy things marketed in live broadcasts, like collection walnuts, which I don't think he would have done but for the epidemic."

-Beijing, Dangdang, female, 27 years old

14pm

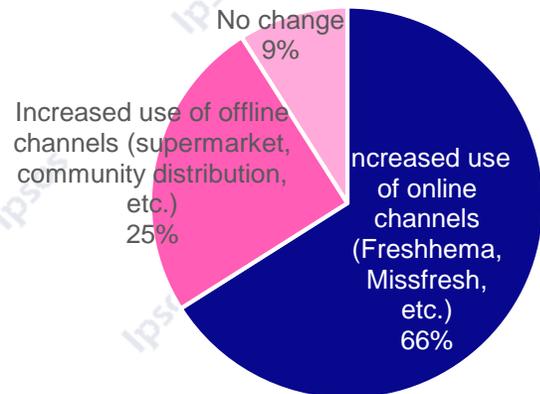
I'm a bit hungry, so first I cook a packet of instant noodles. Then buy some cook material on Freshhema.com, so that I can learn with Xiachufang (a recipe APP) to cook some delicacy for dinner tonight...



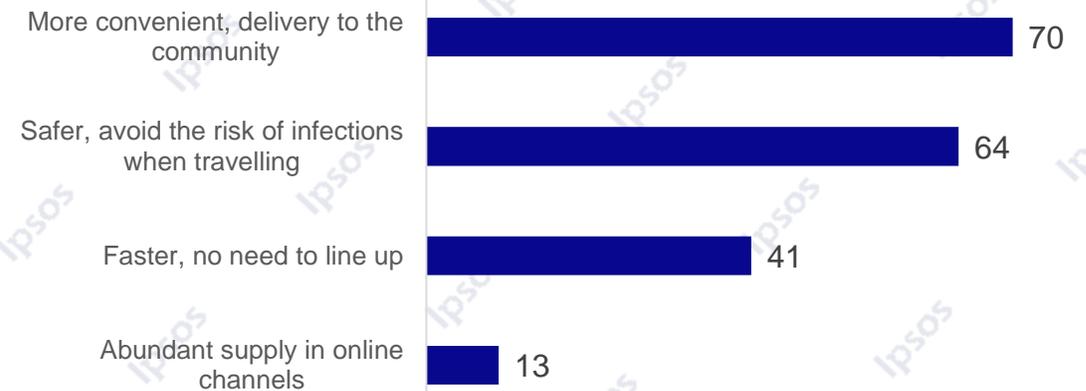
Online catering consumption “refresh” for young people

- To reduce the risk of infection, young people **have increased their use of online food ordering / grocery services** during the epidemic
- "Young people" + "parents" = A wave of online shopping

Catering consumption channels



Reasons to use online channels

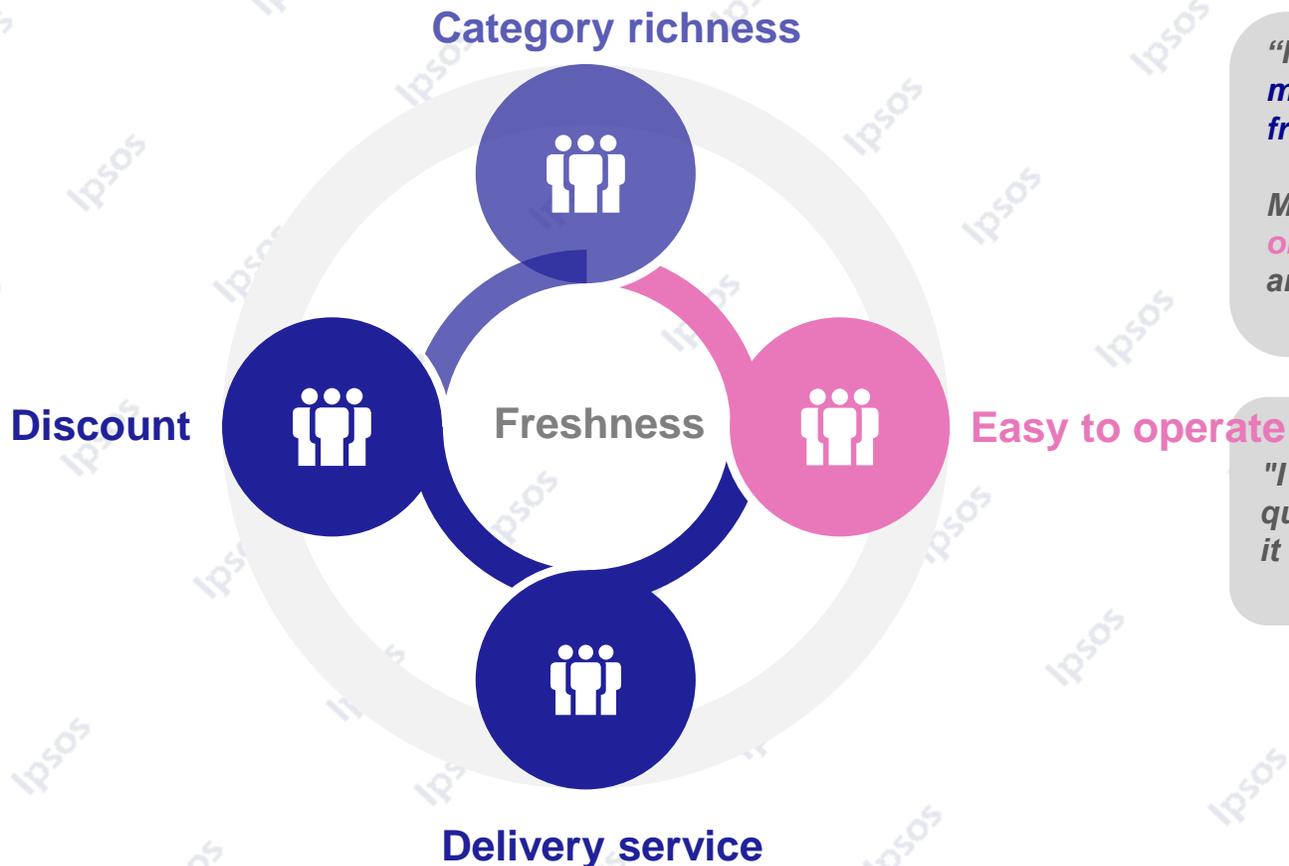


"I live with my parents, and they used to go to the grocery market. Now as we can't go out because of the epidemic, it is I that buy food via mobile phone. As for vegetables, the supermarket has quite abundant supply." -Beijing, Sanzi, female, 26 years old

"Because of the epidemic, my parents have learned to buy food online, for instance, they now snap up via Freshhema every day."-Wuhan, Ayu, male, 27 years old

"Freshness" is the determining factor for the long-term development of fresh food O2O

- **Freshness** is a prerequisite for young consumers to choose vegetables online.
- "Category richness" + "Discount" + "Delivery Service" + "Easy to operate" = Stronger user stickiness



*"I don't think I will buy food online anymore, as is found that **meat, fish, etc.** sold on Mishfresh or Freshhema are **not fresh at all.**"*

*Moreover, it is not easy for my parents, at their age, to **shop online.** They would rather go to the market where vegetables are much fresher." – Wuhan, Yangyang, female, 28 years old*

*"I feel that things I buy online are **quite fresh** and in good quality. Besides, the discount is appealing, that's why I give it a try." - Beijing, Sanzi, female, 26 years old*

16pm

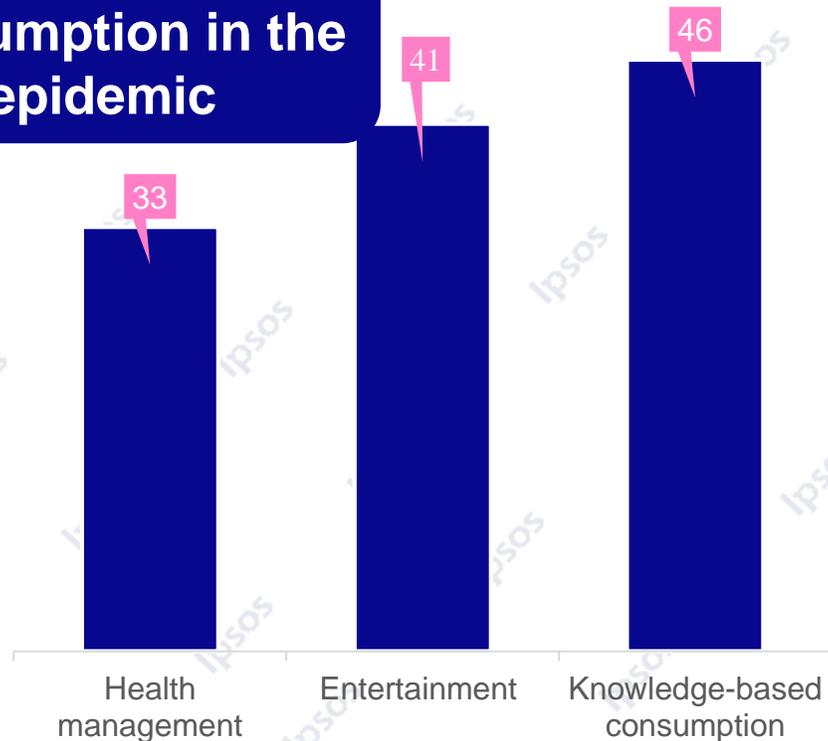
**It's so late, but I don't want to idle away again.
Maybe I can read some management ebooks
on WeChat...**



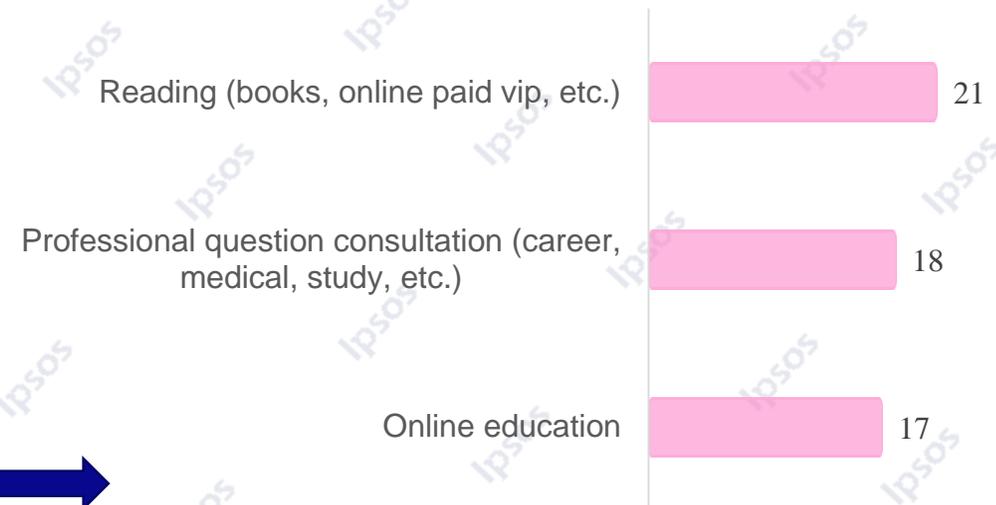
Young people use the extended holiday to enrich themselves

- In the epidemic, young people increase **knowledge-based consumption**.
- Of the knowledge-based consumption, the expenditure on **online reading** (VIP member) is the highest, followed by **professional consulting**.

Increased consumption in the epidemic



Knowledge-based consumption



20pm

As I get used to the “forced” stay at home, it comes to me
that **I have also changed much due to
the epidemic...**

1.

Go to the gym regularly

Live and keep healthy before achieving success



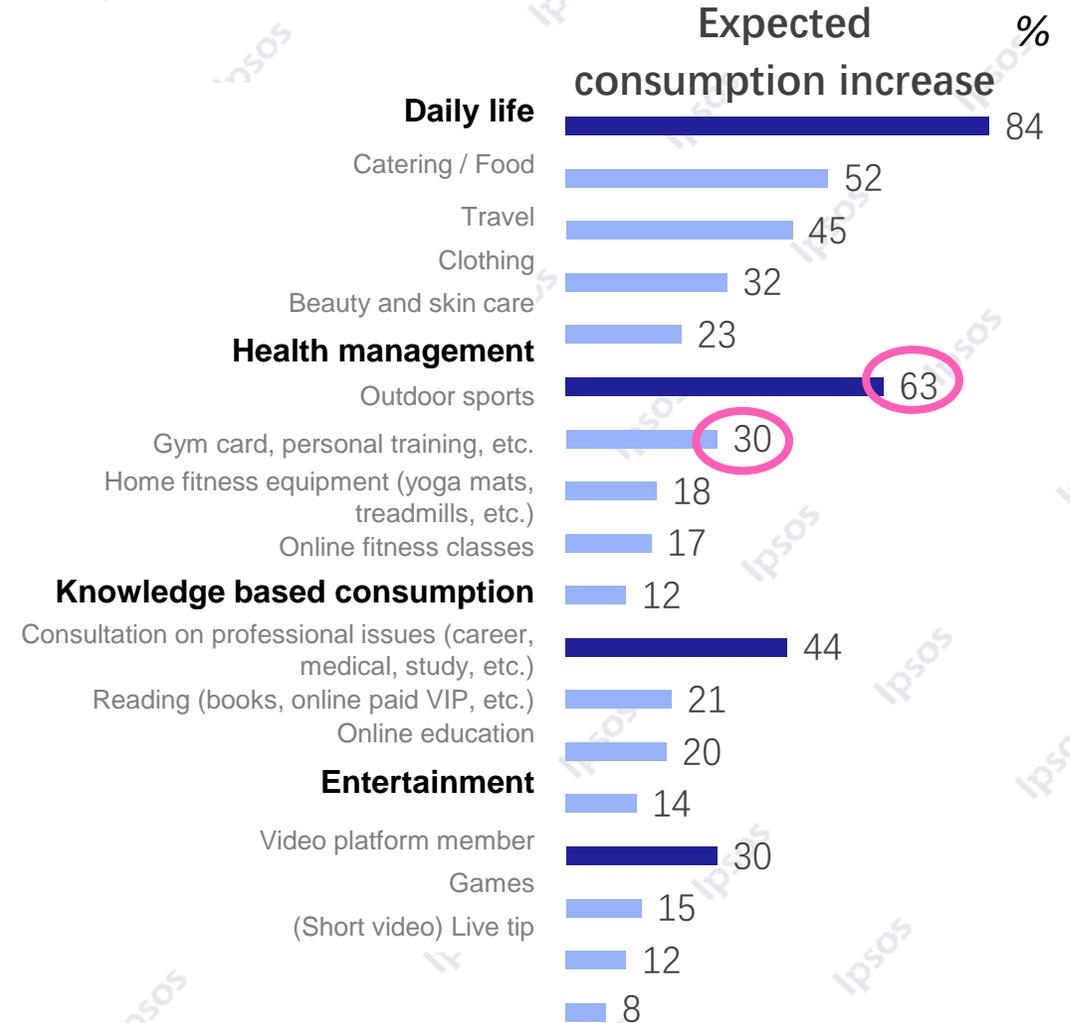
- **Health management** ranks 2nd in expected consumption increase.



- Compared with those aged 18-24, **people of 25-30 years old “cherish” life more.**



- **Nearly 30% of young people without fitness habits before the epidemic have planned to do exercises.**



2.

Buy medical insurance

Physical health is essential, so is financial security



- Demand for insurance assets, especially **medical insurance**, has increased.



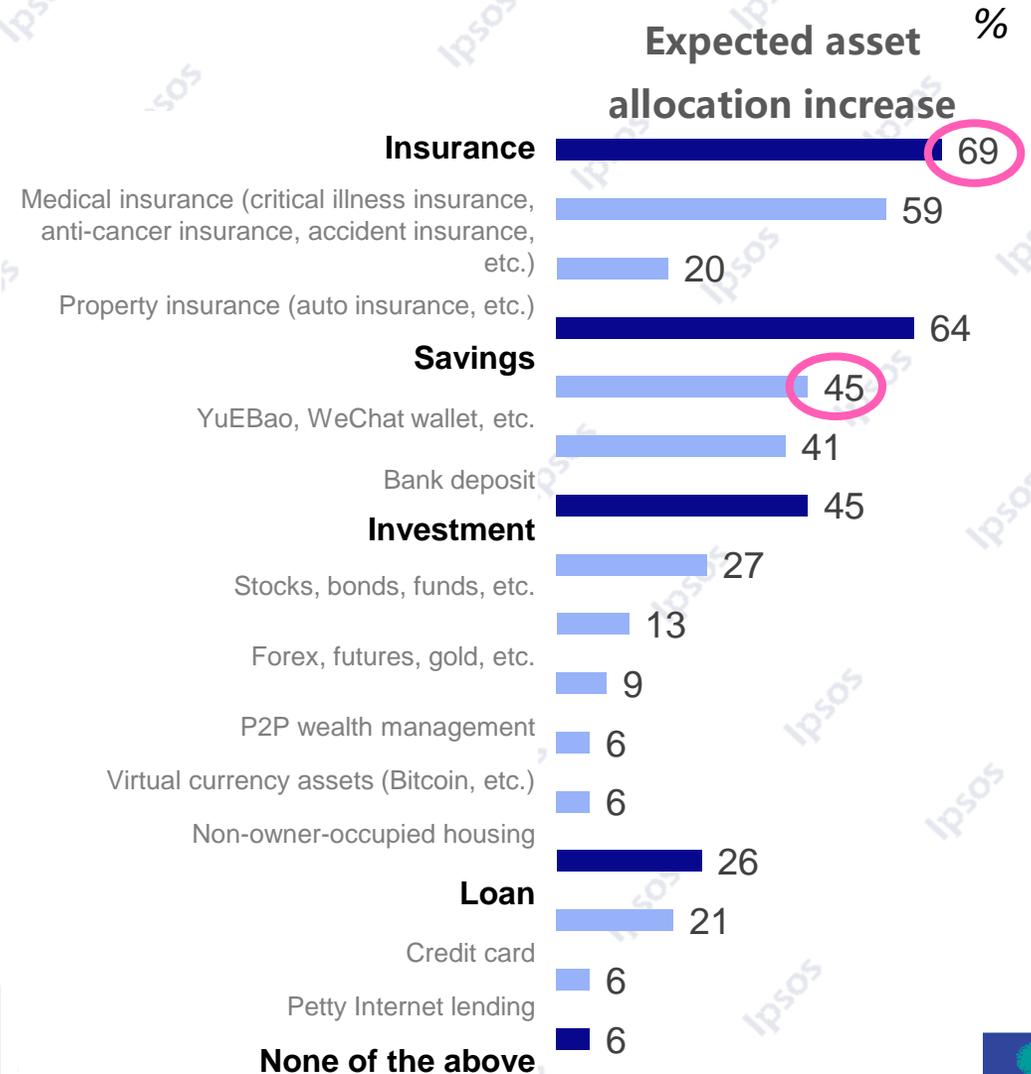
- The allocation of savings assets has increased. Instead of banks, young people prefer Alipay or WeChat for wealth management.



- Men intend to increase the allocation of investment assets, while women prefer insurance assets.

"I invest a little more in my skills to earn money. A fixed 30% of my income is put aside for regular deposits."

- Wuhan, Tingting, 30 years old



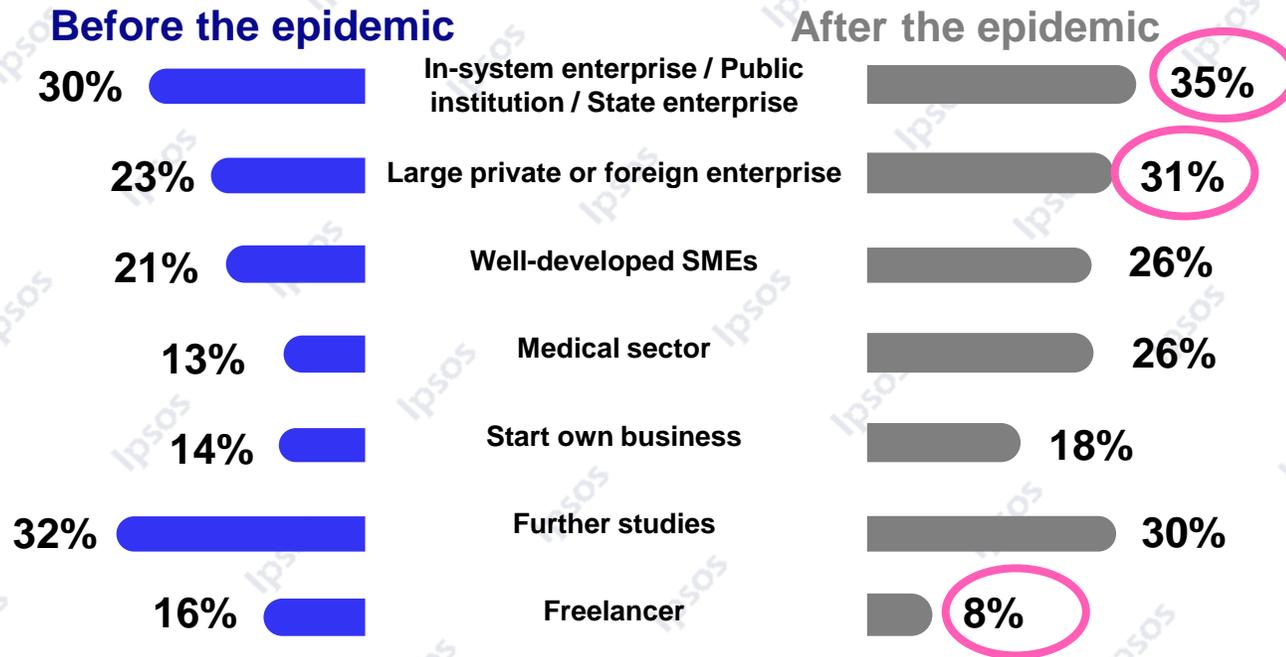
3.

**Work in large private enterprises
for a few years**

Due to sense of uncertainty, young people stress stability in career planning

- Students and the unemployed have showed **stronger willingness to work**; public institutions, large private companies and foreign companies become their new choice

Career direction of students / the unemployed



Post-epidemic career planning %



"For me, things may get different. I worked in a small enterprise in Shenzhen before the epidemic, and if it fails to express regards to us Wuhan employees, next I may look for a job in a big company." - Wuhan, Xiaoya, 27 years old

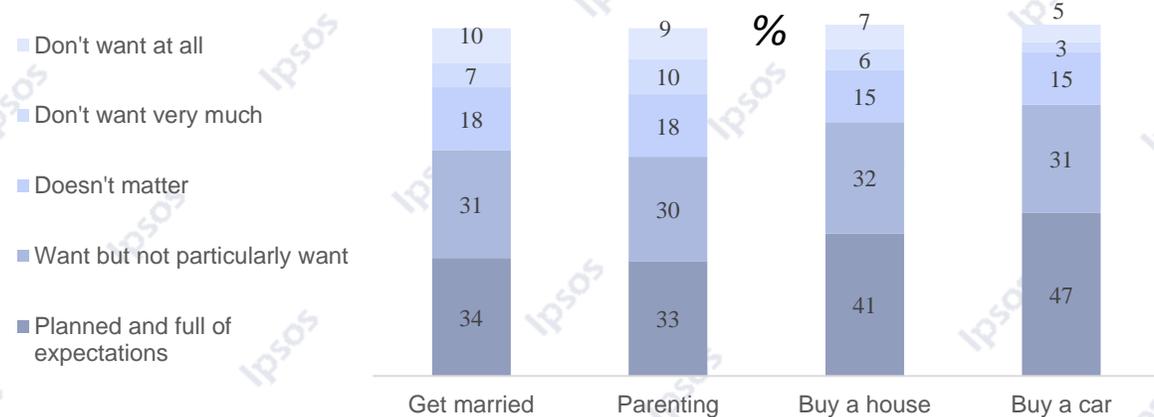
4.

Save money and buy a house with mortgage

Stable and intimate relationship is valuable in a unpredictable world

- They show increased willingness to get married, raise kids, buy a house or a car
- Compared with those from cities of other tiers, young people in tier-1 are more ready to buy a house.
- Young people of high incomes are now more willing to have children while those of low incomes prefer not.

Future planning before the epidemic



Planning changes after the epidemic



"When I was tied up with work before, I had no time to call my parents, but now I can, a chance to have better understanding of them. I am grateful for this domestic affection." - Beijing, Dada, 27 years old

5.

Regular participation in nonprofit forums online

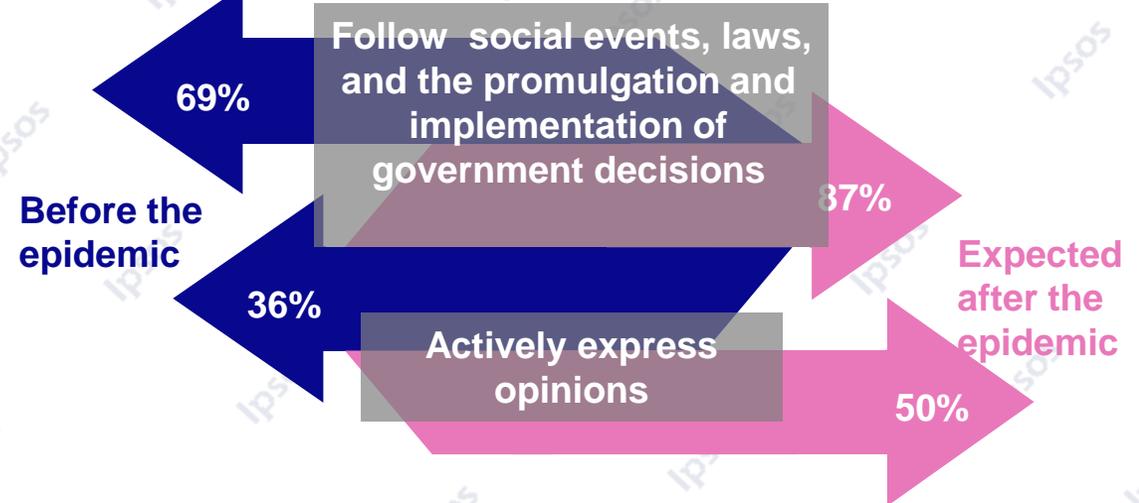
Actively involve in and speak up for public interests

- Social participation is not just a temporary act, and young people will **be more ready to take part in public welfare activities and donations**
- "Social media penetration" + "official media involvement" = Young people **concern themselves with social events, government decisions, and actively express their opinions**

Involvement in public welfare %

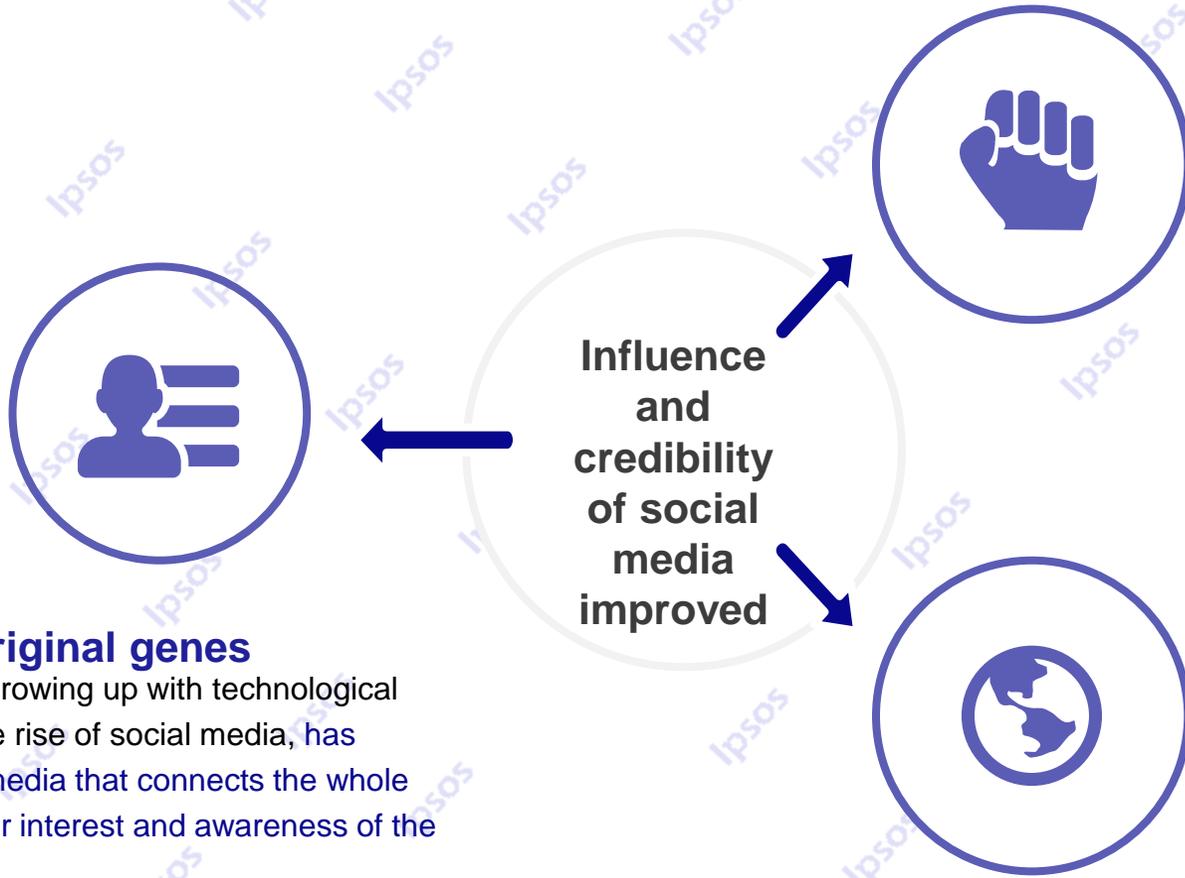


Involvement in public affairs



Beijing Temple Fair was cancelled because of the epidemic ... I actually supported this initiative, I forwarded comments on Weibo, and even call 12345 to share my view on it. It was something different from before, when I deemed it had nothing to do with me. Now I realize the importance of active involvement and don't want to be a bystander any more. - Beijing, Dada, 27 years old

More social media provides a platform for individual voices



Internet aboriginal genes

This generation, growing up with technological innovation and the rise of social media, has better access to media that connects the whole globe and stronger interest and awareness of the outside world.

It is also reflected in the epidemic.

Closer connection of individuals with others and society

Amplified individual voices, multiple perspectives and experiences, better understanding

It is manifested in empathy for individual sufferings and a sense of "mission" in involving in public affairs, social supervision and social equality achieved with joint efforts.

Be a world citizen

Besides following the development of the epidemics in local areas, more and more people concern themselves with its spread worldwide, international rescue, R&D of drugs, and outstanding prevention.

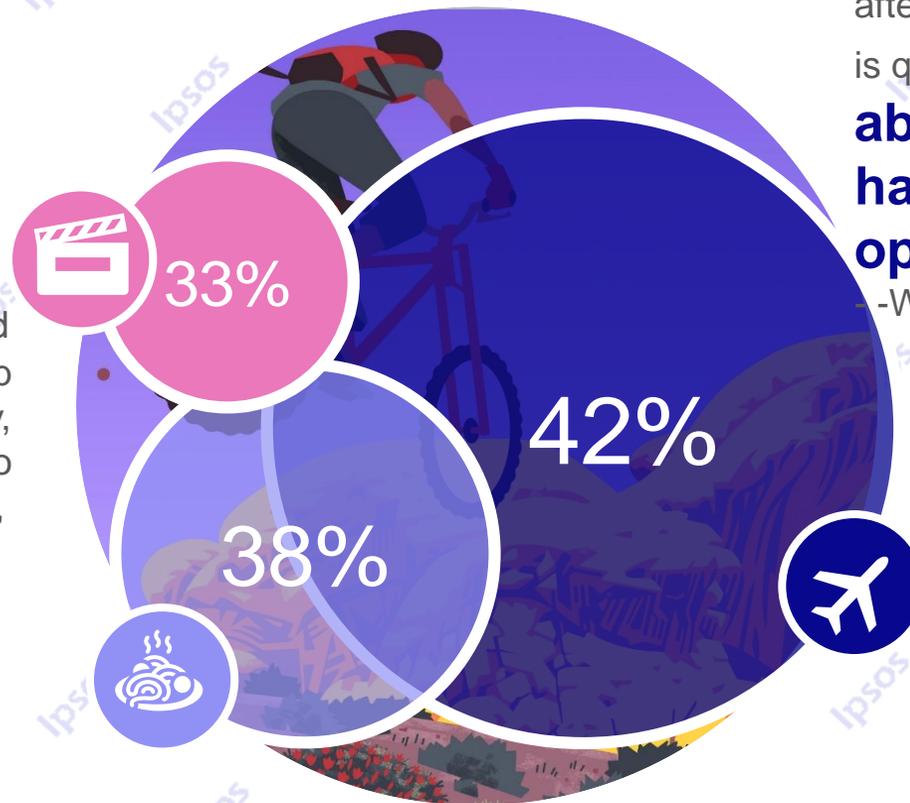
It is believed that the epidemic is not only a crisis of one country, but can also impact the whole world.

23pm

I will go to eat a **hot pot** with my friends and take my parents abroad for a fun trip, after the epidemic.

Travel, dine together, watch movies, and most importantly, be with the family / friends after the epidemic

"Pig out, of course. I asked my friends to eat roasted whole lamb in the Forest Park before the holiday, but now we had to postpone it due to the epidemic. I can't wait any longer, Until the summer vacation? No."
- Zhanjiang, Lingling, 18 years old



"Maybe (go travelling) at the end of the year, after August and September when the epidemic is quite over. **Probably I will travel abroad with my parents who haven't got such an opportunity.**"

-Wenzhou, Yingying, 22 years old

"Go out to play, or the kid is to go crazy. However, it may not be safe as the epidemic merely ends."

- Wenzhou, Xiao Jing, 29 years old

Industry opportunities and inspiration to brands

Online channels

The buying habits during the epidemic may continue, and **fresh food O2O will usher in explosive growth**

Awareness of knowledge-based consumption gets strengthened, and VIP payment and professional consultation will become part of daily expenditures

Brand can **enhance young people's positive perception** of them by **conveying brand proposition**, voicing for the society, providing social assistance, and engaging in sincere communication



Online channels and social media further integrated into daily life

Short term

The **tourism, catering and film industries** will see explosive demand growth after the epidemic that made young people aware of the impermanence of the world and the importance to seize the day. **Traveling abroad** can go up their to-do lists

Affected by the epidemic, **online socializing, e-commerce, live promotion** attracted people used to be tied up to work before the epidemic



Demands rebound in short term

Medium and long term

Favorable conditions for the gym and fitness industry over medium and long term: Improving physical immunity has become a stronger demand for young people aged 25-30, and new equipment bought and online courses joined in the epidemic will continue after it

Insurance and financial industries penetrate in youngsters: A big anxiety arising from the epidemic is that one may fall into poverty because of illnesses. Medical insurance and wealth management will attract more young customers, and related product and demand deserve more energy to develop

Online education is booming, with more opportunities in tier-3 cities and below



More rational medium- and long-term planning, more ready to invest in themselves

Thank You

More information

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