HOW **GEN Z** IS RESPONDING TO THE **BLACK LIVES MATTER PROTESTS AND THE IMPLICATIONS FOR BRANDS**

**JUNE 2020**
KEY FINDINGS

1. Members of Gen Z (Americans age 13-23) have a growing sense that the world isn’t fair and their optimism about the country’s future is falling in the context of a global pandemic and national unrest.

2. Gen Z now sees the Black Lives Matter movement as the second most impactful event of their lifetimes, behind only the coronavirus outbreak.

3. The vast majority of Gen Z supports the protest movement, and many have taken concrete actions in support of it.

4. Two-thirds of Gen Z says that how businesses react and express themselves regarding Black Lives Matter will permanently affect their decision to buy from them in the future.
METHODOLOGY

This report results from three waves of research Morning Consult has conducted with Gen Z to understand the impact of COVID-19, Black Lives Matter, and other recent events on this generation:

• April 9-12, 2020 among 1,000 U.S. members of Gen Z (ages 13-23) with a +/-3 percentage point margin of error and April 9-11, 2020 among 2,200 U.S. adults with a +/-2 percentage point margin of error.

• May 1-3, 2020 among 1,000 U.S. members of Gen Z (ages 13-23) with a +/-3 percentage point margin of error and 2,200 U.S. adults with a +/-2 percentage point margin of error.

• June 12-15, 2020 among 1,000 U.S. members of Gen Z (ages 13-23) with a +/-3 percentage point margin of error and 2,200 U.S. adults with a +/-2 percentage point margin of error.
GEN’Z SHIFTING WORLDVIEW
RESPONSE TO #BLACKLIVESMATTER PROTESTS
IMPLICATIONS FOR BRANDS
81% of Gen Z says the U.S. is on the wrong track, up sharply from May

Now, generally speaking, would you say that things in the country are going in the right direction, or have they pretty seriously gotten off on the wrong track?
Gen Z’s Worldview

Gen Zers are less optimistic about the future, but increasingly believe they can shape it

Share of U.S. Gen Z adults who:

- Feel very optimistic about the future of the U.S.
  - April: 18%
  - May: 17%
  - June: 13%

- Feel very optimistic about the future of the world
  - April: 20%
  - May: 17%
  - June: 15%

- Strongly agree that the world is a fair place
  - April: 7%
  - May: 6%
  - June: 5%

- Strongly agree that I have the potential to impact the world
  - April: 25%
  - May: 23%
  - June: 30%
Gen Z’s trust in major institutions is falling, especially the police

Share of Gen Z U.S. adults who say they trust each of the following a lot, ranked by the largest drop from April to June:

- **The police**: 27% (April), 13% (May), 17% (June)
- **The health care system**: 30% (April), 17% (May), 14% (June)
- **My state government**: 23% (April), 14% (May), 17% (June)
- **The military**: 29% (April), 21% (May), 17% (June)
- **The U.S. Government**: 17% (April), 10% (May), 17% (June)
GEN Z’S WORLDVIEW

Trump’s already low approval rating with Gen Z dips even further

The share of Gen Z respondents (13-23) who approve or disapprove of how Trump is handling his job

- **Approve (Gen Z)**
- **Disapprove (Gen Z)**
- **Approve (all adults)**
- **Disapprove (all adults)**

![Graph showing approval and disapproval ratings over time]

- **June ’20**: 22% approve, 66% disapprove
- **May ’20**: 21% approve, 57% disapprove
- **April ’20**: 22% approve, 52% disapprove

**Enhanced Approvals:**
- Smoke from fireplaces
- A fresh breeze
- New friends
- New technology
- The future

**Enhanced Disapprovals:**
- Global warming
- Social media
- Russian election interference
- The presidency
- The economy
GEN’Z SHIFTING WORLDVIEW

RESPONSE TO #BLACKLIVESMATTER PROTESTS

IMPLICATIONS FOR BRANDS
RESPONSE TO PROTESTS

Gen Z now sees the Black Lives Matter movement as the second most impactful event of their lifetimes

Share of Gen Z U.S. adults who report that the following events have had a major impact on their worldview:

<table>
<thead>
<tr>
<th>Event</th>
<th>April</th>
<th>June</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coronavirus Outbreak</td>
<td></td>
<td>75%</td>
</tr>
<tr>
<td>The #BlackLivesMatter movement</td>
<td>78%</td>
<td></td>
</tr>
<tr>
<td>President Donald Trump’s election</td>
<td>47%</td>
<td>68%</td>
</tr>
<tr>
<td>Mass Shootings in America</td>
<td>55%</td>
<td>63%</td>
</tr>
<tr>
<td>The terrorist attacks of September 11th</td>
<td>57%</td>
<td>61%</td>
</tr>
<tr>
<td>President Barack Obama’s election</td>
<td>56%</td>
<td></td>
</tr>
<tr>
<td>The #MeToo movement</td>
<td>46%</td>
<td>52%</td>
</tr>
<tr>
<td>The Iraq War</td>
<td>34%</td>
<td>38%</td>
</tr>
<tr>
<td>The 2008 financial crisis</td>
<td>35%</td>
<td>32%</td>
</tr>
<tr>
<td>The 2008 financial crisis</td>
<td>30%</td>
<td>28%</td>
</tr>
</tbody>
</table>
RESPONSE TO PROTESTS

Gen Z is notably more likely to support the Black Lives Matter protests than older generations

The share who say they support "a lot" or "somewhat"

- **Support the Black Lives Matter protests**
  - Gen Z: 81%
  - Millennials: 70%
  - Gen X: 62%
  - Boomers: 56%

- **Support the police**
  - Gen Z: 41%
  - Millennials: 48%
  - Gen X: 72%
  - Boomers: 77%
12% of Gen Z attended a recent protest, and 39% participated in #BlackOutTuesday

Share of U.S. adults indicating that they have done any of the following in recent weeks since the death of George Floyd:

- Spoke to friends or family about the protests or race-related issues: 53% of all adults; 64% of Gen Z
- Made an effort to learn more about actions I can take to support racial justice: 46% of all adults; 27% of Gen Z
- Posted about the protests or race-related issues on social media: 41% of all adults; 23% of Gen Z
- Participated in #BlackoutTuesday: 39% of all adults; 20% of Gen Z
- Made an effort to encourage others to support the Black Lives Matter movement: 39% of all adults; 19% of Gen Z
- Begun making a more concerted effort to support minority-owned businesses: 19% of all adults; 14% of Gen Z
- Donated money to a cause related to the protests: 16% of all adults; 9% of Gen Z
- Attended a protest: 6% of all adults; 12% of Gen Z
RESPONSE TO PROTESTS

More key figures

54 percent of Gen Z supports the movement to defund the police, compared to 36 percent of all adults. Among just Gen Z Democrats, 88 percent support the movement.

8 in 10 white Gen Zers said the protests made them more aware of race-related issues in America: 48 percent said “much more” aware and 32 percent said “somewhat more” aware. Among white adult Americans, 28 percent said the protests made them much more aware of race-related issues, and 33 percent said somewhat more.

54 percent of black and 46 percent of female Gen Zers participated in #BlackOutTuesday: That’s compared to 36 percent of white and 31 percent of male Gen Zers who participated in the social media driven campaign to raise awareness of racial injustice.
GEN’Z SHIFTING WORLDVIEW

RESPONSE TO THE #BLACKLIVESMATTER PROTEST

IMPLICATIONS FOR BRANDS
IMPLICATIONS FOR BRANDS

Gen Z cares deeply about how brands respond to Black Lives Matter

To what extent do you agree with each of the following statements?

- **Companies and/or their leaders should use their influence to demand action from government entities who have the power to enact systemic change.**
  - Strongly Agree: 40%
  - Somewhat agree: 36%
  - Somewhat disagree: 15%
  - Strongly Disagree: 8%

- **Corporations play an important role in this country, and they should use their influence to impact political and cultural issues.**
  - Strongly Agree: 38%
  - Somewhat agree: 38%
  - Somewhat disagree: 15%
  - Strongly Disagree: 9%

- **I will strongly consider how companies react in response to the Black Lives Matter movement when deciding whether or not to pursue employment with them in the future.**
  - Strongly Agree: 30%
  - Somewhat agree: 37%
  - Somewhat disagree: 20%
  - Strongly Disagree: 13%

- **How businesses react and express themselves on topics such as Black Lives Matter will permanently affect my decision on whether or not to buy from them in the future.**
  - Strongly Agree: 30%
  - Somewhat agree: 36%
  - Somewhat disagree: 20%
  - Strongly Disagree: 14%
They value actions over statements and want responses to be genuine

To what extent do you agree with each of the following statements?

- Strongly Agree
- Somewhat agree
- Somewhat disagree
- Strongly Disagree

While I appreciate companies and business leaders making a public statement or posting about movements such as Black Lives Matter, their actions speak louder than their words:

- 52% Strongly Agree
- 30% Somewhat agree
- 12% Somewhat disagree
- 7% Strongly Disagree

I will strongly consider the extent to which companies have delivered on the commitments they are making now in response to the Black Lives Matter movement when deciding whether or not to buy from them in the future:

- 30% Strongly Agree
- 37% Somewhat agree
- 20% Somewhat disagree
- 13% Strongly Disagree

Companies releasing statements in light of recent Black Lives Matter protests primarily want to get publicity vs. genuinely want to do good:

- 26% Strongly Agree
- 47% Somewhat agree
- 20% Somewhat disagree
- 6% Strongly Disagree
**IMPLICATIONS FOR BRANDS**

Gen Z is looking for CEOs to respond publicly to the #BlackLivesMatter movement

To what extent do you agree with each of the following statements?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Somewhat agree</th>
<th>Somewhat disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>CEOs should make a statement, whether official or personal, about their commitment to be an ally</td>
<td>32%</td>
<td>39%</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>How company CEOs react and express themselves on topics such as Black Lives Matter will permanently affect my decision to buy from their company in the future</td>
<td>29%</td>
<td>36%</td>
<td>20%</td>
<td>15%</td>
</tr>
</tbody>
</table>
Company diversity will in part drive Gen Z’s employment decisions

Share of U.S adults who say that the following are more important when considering employment with a company in light of the COVID-19 pandemic and recent Black Lives Matter protests:

- The racial diversity of the company’s employees
  - May (Gen Z): 62%
  - June (Gen Z): 66%
  - June (all adults): 61%

- The gender diversity of the company’s employees
  - May (Gen Z): 60%
  - June (Gen Z): 65%
  - June (all adults): 58%

IMPLICATIONS FOR BRANDS
**IMPLICATIONS FOR BRANDS**

Gen Z values companies that strive to fight racism within their organization the most

Which of the following is most important to you? In times like this, companies should mainly provide specifics on how they are committing to...

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fight racism and discrimination within their organization</td>
<td>26%</td>
</tr>
<tr>
<td>Improve social, racial and economic equality in their organization</td>
<td>20%</td>
</tr>
<tr>
<td>Demand more diversity, inclusion, and equality throughout their org.'s supply chain</td>
<td>12%</td>
</tr>
<tr>
<td>Promote diversity, inclusion and equality within their organization</td>
<td>10%</td>
</tr>
<tr>
<td>Ensure more diverse and equitable representation at all their organization</td>
<td>9%</td>
</tr>
<tr>
<td>Ensure their organization’s hiring process is more equitable, inclusive, and accessible moving forward</td>
<td>7%</td>
</tr>
</tbody>
</table>
Gen Z is more likely to support minority and black businesses

Share of U.S. adults who say the current Black Lives Matter protests and demonstrations make them more likely to do the following:

- Donate to a local organization or group impacted by the protests and demonstrations:
  - All adults: 36%
  - Gen Z: 56%

- Support a minority-owned business:
  - All adults: 37%
  - Gen Z: 47%

- Shop at a black-owned business:
  - All adults: 33%
  - Gen Z: 47%