WP Engine Generation Resilience Report 2021 Australian Data

15 September 2021

(Under embargo until 21 September 2021, 12.00pm)

Generation Resilience Report 2021 Overview

Research Objective
To understand the impact digital has had on Australian behaviours, preferences and motivations, in light of the COVID-19 pandemic.

Audience
1,000 Australians

Objectives

- Evaluate how Australians have adapted to digital during the last year, including through the COVID-19 pandemic.

- Discover how different generations have changed and adapted to the pandemic and post-pandemic world.

- Explore the pandemic and post-pandemic impact on trends and behaviours that will shape the next 3-5 years following the recent surge in digital.

Study conducted by Center for Generational Kinetics (CGK).

Key Findings

Aussies survive 3 days without water but only 4 hours without internet: 44% of Australians are unable to go more than four hours without Internet access before becoming "uncomfortable". Millennials are the most internet-obsessed, with over a quarter (27%) saying they cannot go more than *an hour* without internet before becoming "uncomfortable".

Young Aussies fear their online rep will impact their financial future: Two thirds of Gen Z (67%) fear their online actions (e.g. social media posts, past purchases) will affect future job offers. Over half of young Australians think their online rep will determine their dating options (Gen Z 53%; Millennials 52%), and whether they'll be eligible for a loan to buy a car or a house in the next five years (Gen Z 60%; Millennials 51%).

COVID-19 kickstarts young Aussies' careers: Younger generations are the most likely to think remote work has stunted their careers (Gen Z 50%; Millennials 39%). However, they're taking back control over their careers, with 51% of Gen Z and 41% of Millennials intending to start their own business. Over half intend to launch their business online (Gen Z 55%; Millennials 62%). Gen Z focus industries are retail (25%), entertainment (22%), beauty and wellness (21%) and technology (12%). Millennials' is technology at 20%.

Aussies make new friends online during COVID-19: 73% of Australians feel the Internet has made people more connected during the pandemic. This increases to 4-in-5 of Gen Z (83%). 63% of Gen Z believe their relationships (romantic, work and school) have suffered due to COVID-19 while 74% of Baby Boomers said their relationships haven't suffer at all. Over half of Gen Z (54%) made a new friend online during COVID-19.

RESILIENCE

DIGITAL PERSPECTIVE
DURING THE PANDEMIC

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Australia remains incredibly dependent on the Internet

44% of Australians can't go more than 4 hours without Internet access before they become uncomfortable.

Over the last four years, the total number that can't go more than four hours has consistently hovered in between 41% and 47% (statistically insignificant changes). All other time frames remain statistically stable as well.

LENGTH OF TIME YOU COULD LIVE COMFORTABLY WITHOUT INTERNET ACCESS, TIME SERIES
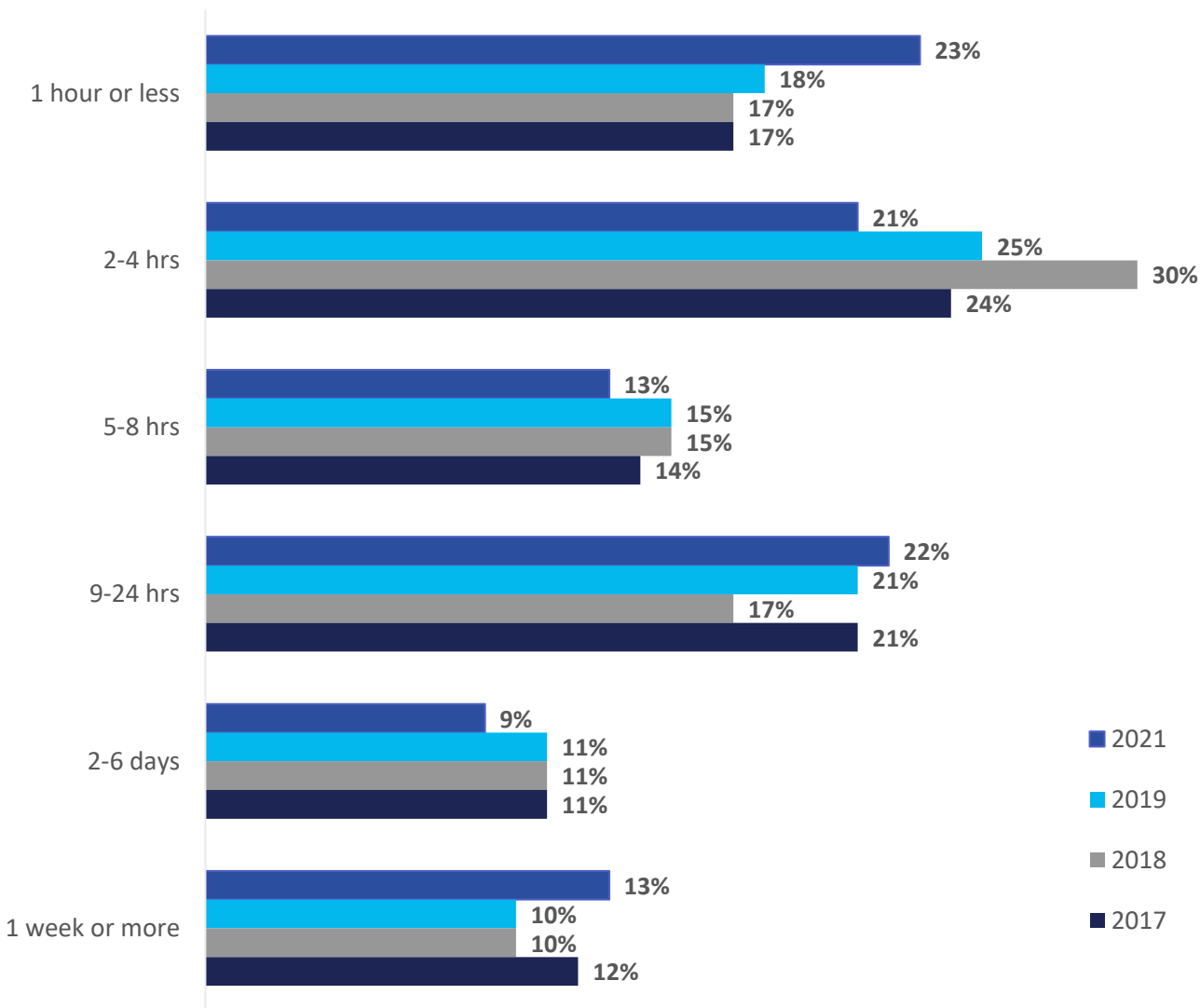
1 hour or less
- 2021: 23%
- 2019: 18%
- 2018: 17%
- 2017: 17%

2-4 hrs
- 2021: 21%
- 2019: 25%
- 2018: 30%
- 2017: 24%

5-8 hrs
- 2021: 13%
- 2019: 15%
- 2018: 15%
- 2017: 14%

9-24 hrs
- 2021: 22%
- 2019: 21%
- 2018: 17%
- 2017: 21%

2-6 days
- 2021: 9%
- 2019: 11%
- 2018: 11%
- 2017: 11%

1 week or more
- 2021: 13%
- 2019: 10%
- 2018: 10%
- 2017: 12%

Legend:
- 2021
- 2019
- 2018
- 2017

Q1. How long could you comfortably go without accessing the Internet? *Select one.*

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Millennials and Gen Z remain the most Internet-dependent generations

51% of Gen Z can't go more than 4 hours without Internet access before they become uncomfortable, a slight increase from 2019 (47%).

On the other end of the spectrum, **23% of Boomers** can go between 2 – 6 days without access to the Internet, similar to 2019 (20%).

LENGTH OF TIME YOU COULD LIVE COMFORTABLY WITHOUT INTERNET ACCESS BY GENERATION (2021)

1 hour or less
- Gen Z: 18%
- Millennials: 27%
- Gen X: 22%
- Boomers: 12%

2-4 hrs
- Gen Z: 23%
- Millennials: 24%
- Gen X: 16%
- Boomers: 10%

5-8 hrs
- Gen Z: 19%
- Millennials: 13%
- Gen X: 9%
- Boomers: 9%

9-24 hrs
- Gen Z: 22%
- Millennials: 20%
- Gen X: 24%
- Boomers: 21%

2-6 days
- Gen Z: 8%
- Millennials: 7%
- Gen X: 11%
- Boomers: 23%

1 week or more
- Gen Z: 10%
- Millennials: 10%
- Gen X: 18%
- Boomers: 25%

Legend:
- Gen Z (14-25)
- Millennials (26-44)
- Gen X (45-56)
- Boomers 57 - 59
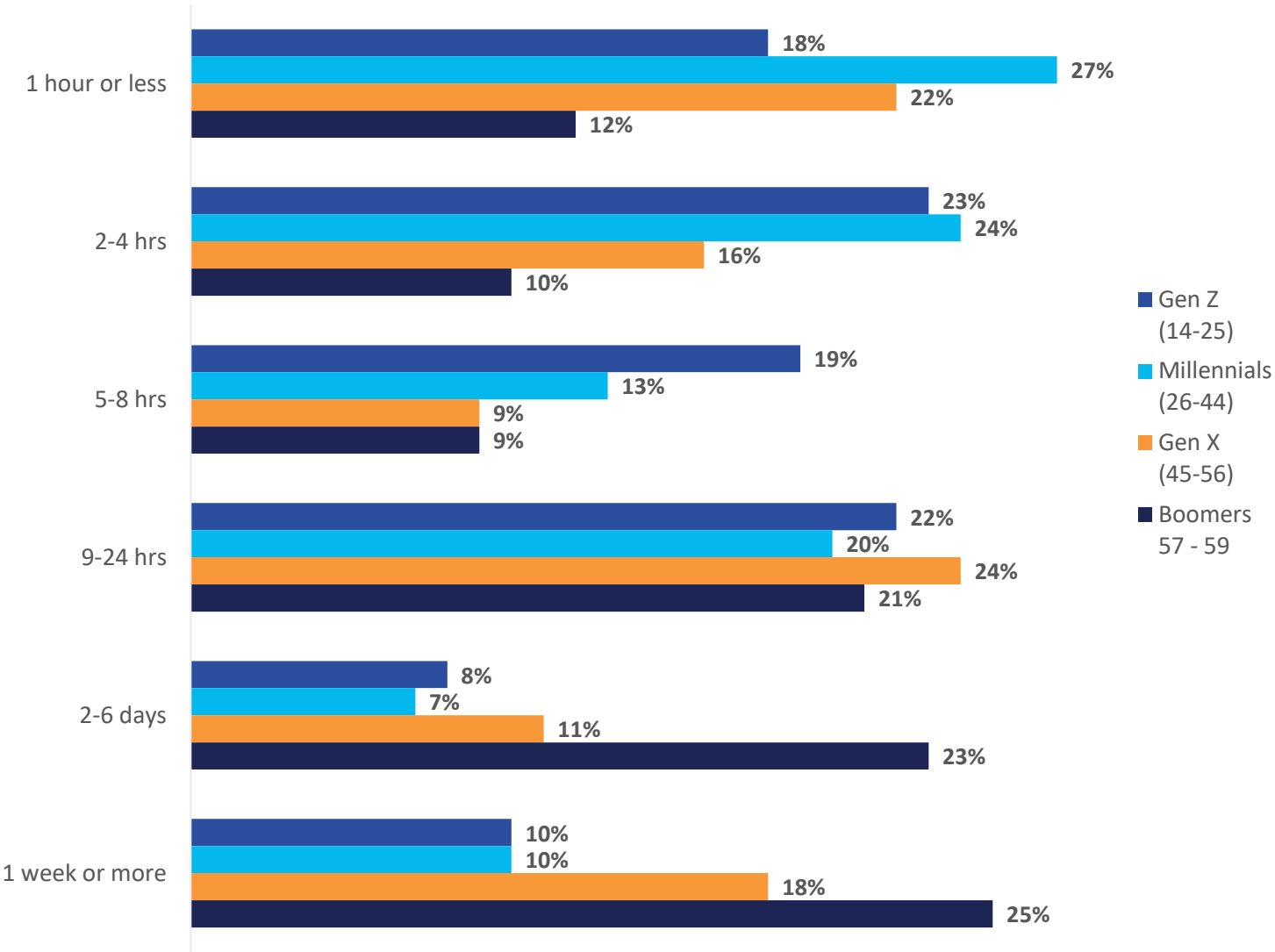
Q1. How long could you comfortably go without accessing the Internet? *Select one.*

Internet use cases vary significantly by generation

Younger generations rely on the internet for entertainment on social connections, while older generations rely on looking for information. This trend has been consistent since the inception of this work in 2017.

Interestingly, the work from home trend has not impacted the primary use case/need the Internet fulfils. Access to business remains at the bottom for all generations.

Overall, Boomers are significantly more likely to not depend on internet daily (18%) vs. 5-7% for all other generations.

ASPECTS OF THE INTERNET YOU DEPEND ON DAILY (2021)

Legend:
- ■ Access to entertainment
- ■ Access to other people and connections
- ■ Access to information
- ■ Access to business

Gen Z: 43%, 28%, 19%, 5%
Millennials: 25%, 22%, 38%, 9%
Gen X: 9%, 21%, 48%, 12%
Boomers: 13%, 16%, 48%, 5%
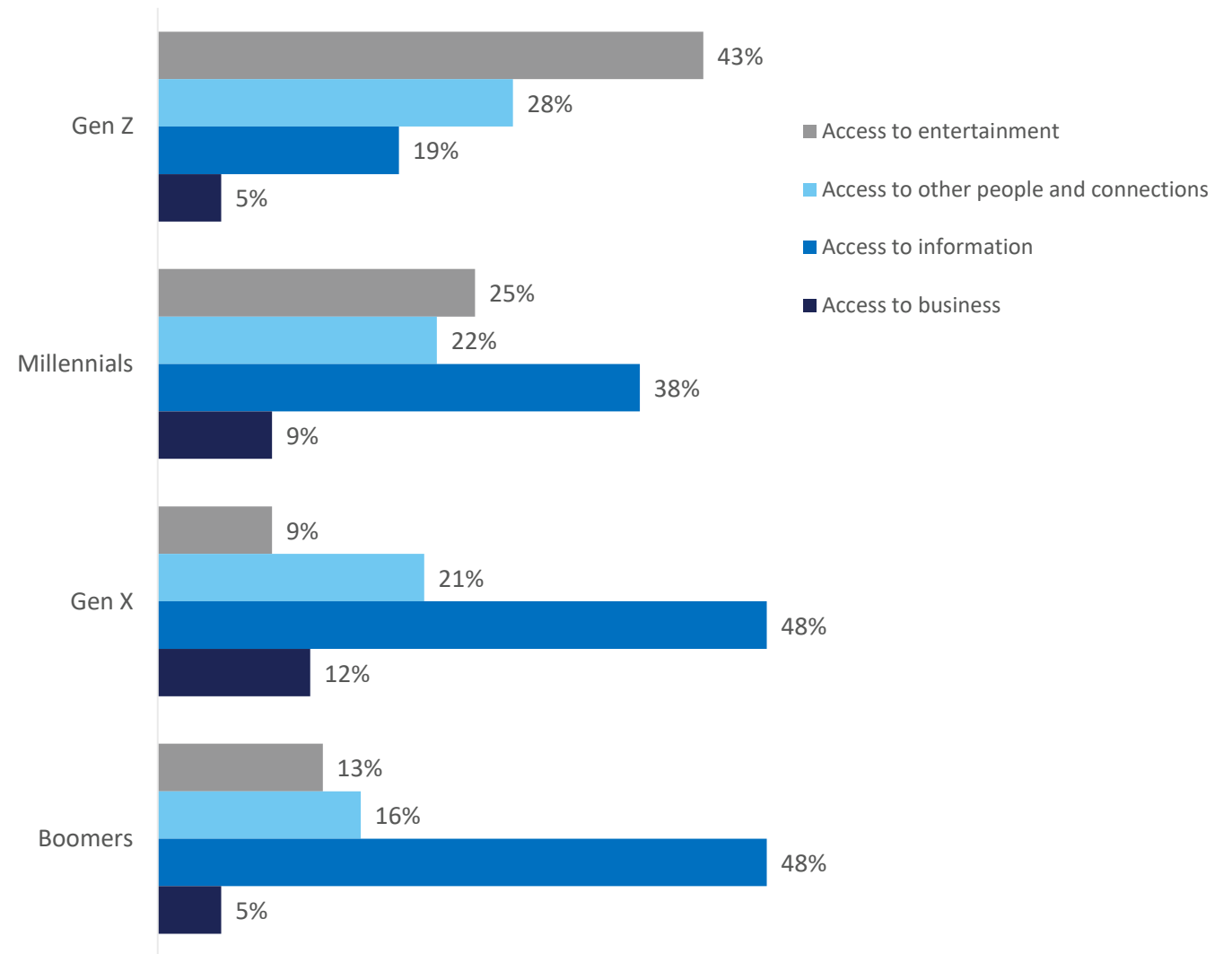
Q2. What aspects of the Internet do you depend on daily? *Select one.*

Overall perceptions of the Internet's future are surprisingly consistent with years past

83% of Gen Z think the Internet has made people more connected. Interestingly, **37% of Gen Z** tried video-chatting for the first time during the pandemic.

Consistent with years past, **Gen Z** is much more optimistic than **Boomers** about the future of AI. **67% Gen Z** compared to **43% of Boomers** believe the use of artificial intelligence will have a positive impact on the world.

47% of Gen Z compared to **29% of Boomers** think that in the next 10 years, all shopping will take place online.

Q3. Please answer yes or no for each of the following questions. *Select one for each row*.
Year over year comparison detail is in the Appendix.
Q11. Which of the following have you done online for the first time over the past year and during the pandemic?
Select all that apply.

The pandemic drove *huge* technology increases, especially in Gen Z & Millennials

TECHNOLOGY USAGE INCREASES DURING PANDEMIC
(2021, Top Two Box – Much more & Slightly more)

Legend:
- Boomers 57 - 59 (dark navy)
- Gen X (45-56) (orange)
- Millennials (26-44) (light blue)
- Gen Z (14-25) (blue)

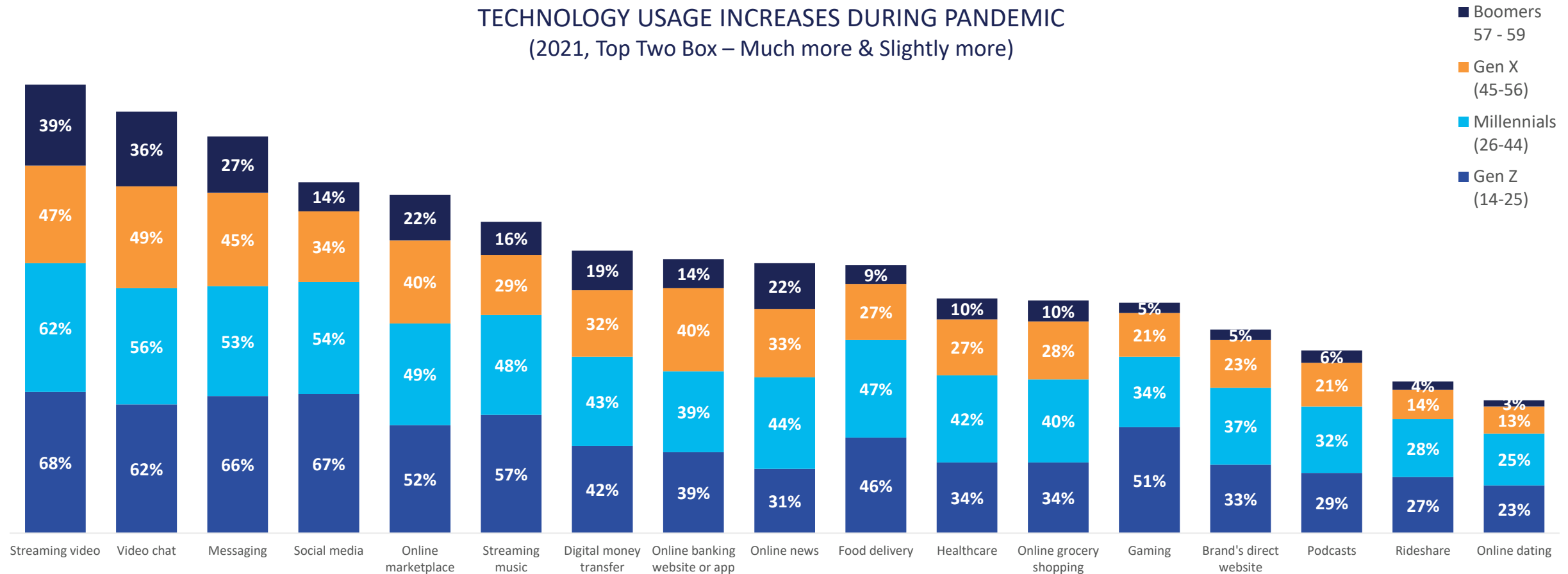| Category	Gen Z (14-25)	Millennials (26-44)	Gen X (45-56)	Boomers 57-59
Streaming video	68%	62%	47%	39%
Video chat	62%	56%	49%	36%
Messaging	66%	53%	45%	27%
Social media	67%	54%	34%	14%
Online marketplace	52%	49%	40%	22%
Streaming music	57%	48%	29%	16%
Digital money transfer	42%	43%	32%	19%
Online banking website or app	39%	39%	40%	14%
Online news	31%	44%	33%	22%
Food delivery	46%	47%	27%	9%
Healthcare	34%	42%	27%	10%
Online grocery shopping	34%	40%	28%	10%
Gaming	51%	34%	21%	5%
Brand's direct website	33%	37%	23%	5%
Podcasts	29%	32%	21%	6%
Rideshare	27%	28%	14%	4%
Online dating	23%	25%	13%	3%

Q4. How has your usage of each type of technology changed over the past year during the pandemic? T2B

Q11. Which of the following have you done online for the first time over the past year and during the pandemic?

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Streaming usage is most pervasive with younger generations; usage decreases as age increases

Gen Z is increasing their streaming usage; **Boomers** haven't tried it yet. **Younger Gen Z's (14-17)** streaming and social utilization far surpasses that of the older Gen Z.

TECHNOLOGY USAGE INCREASES DURING PANDEMIC
(2021, Top Two Box – Much more & Slightly more)

Legend:
- Younger Gen Z (14-17)
- Older Gen Z (18-25)
- Millennials (26-44)
- Gen X (45-56)
- Boomers (57-59)

Streaming video: 77%, 66%, 62%, 47%, 39%
Streaming music: 72%, 54%, 48%, 29%, 16%
Social Media: 82%, 63%, 54%, 34%, 14%
Video Chat: 72%, 60%, 56%, 49%, 36%

Q4. How has your usage of each type of technology changed over the past year during the pandemic? T2B

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10
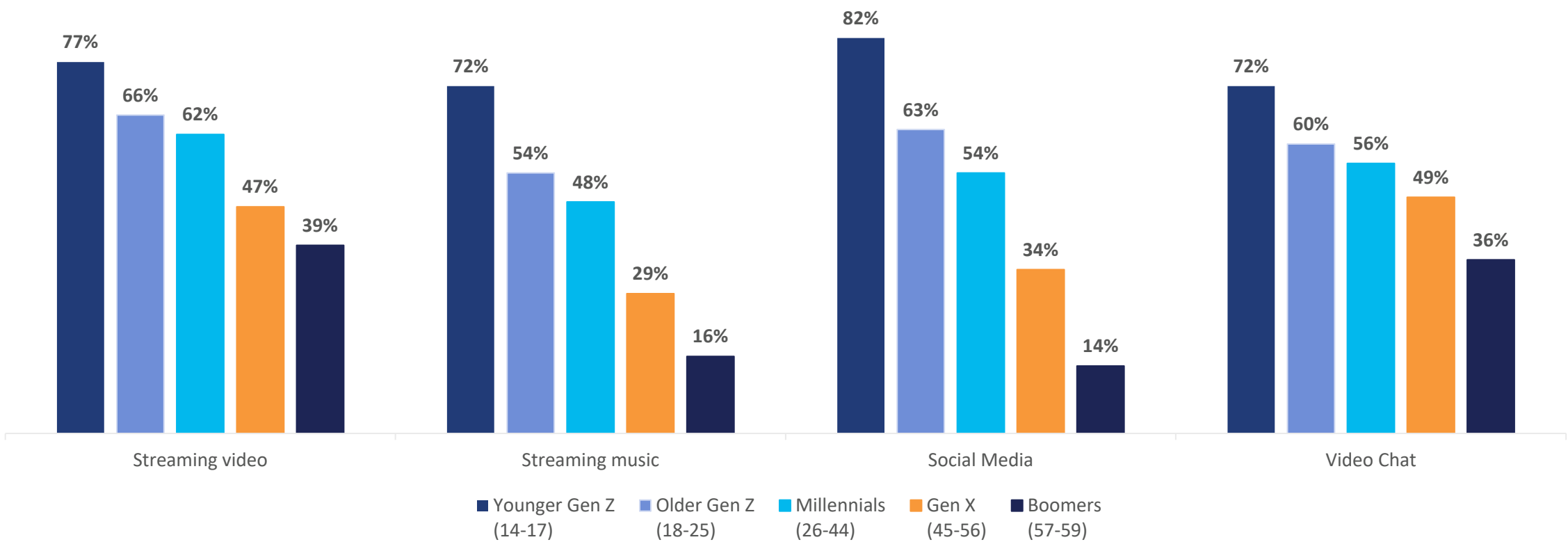
REBUILD

DIGITAL PERSPECTIVE
AFTER THE PANDEMIC

Boomers are dramatically more frustrated with the logistics of online purchases than other generations

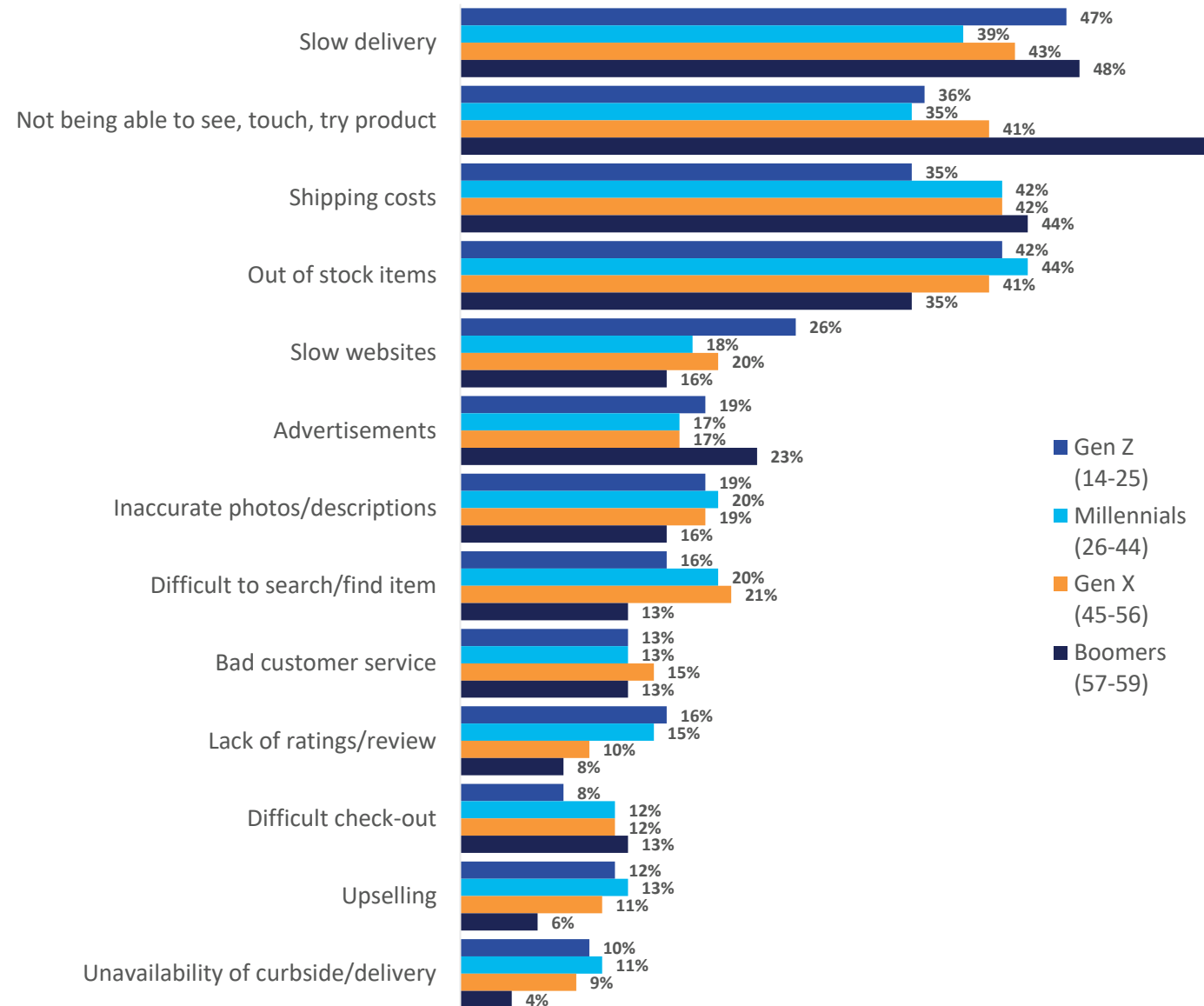Across the board, Gen Z and Millennials are fairly consistent in their answers, but often significantly different from Boomers; this is especially true when it comes to tolerance around logistics.

WOW STAT!

Only one third of Gen Z and **Millennials** include not being able to see, touch, try on the product in their Top 3 frustrations, compared to nearly two thirds of Boomers.

FRUSTRATIONS SHOPPING ONLINE
(2021, Top 3 Ranking)

Frustration	Gen Z	Millennials	Gen X	Boomers
Slow delivery	47%	39%	43%	48%
Not being able to see, touch, try product	36%	35%	41%	
Shipping costs	35%	42%	42%	44%
Out of stock items	42%	44%	41%	35%
Slow websites	26%	18%	20%	16%
Advertisements	19%	17%	17%	23%
Inaccurate photos/descriptions	19%	20%	19%	16%
Difficult to search/find item	16%	20%	21%	13%
Bad customer service	13%	13%	15%	13%
Lack of ratings/review	16%	15%	10%	8%
Difficult check-out	8%	12%	12%	13%
Upselling	12%	13%	11%	6%
Unavailability of curbside/delivery	10%	11%	9%	4%

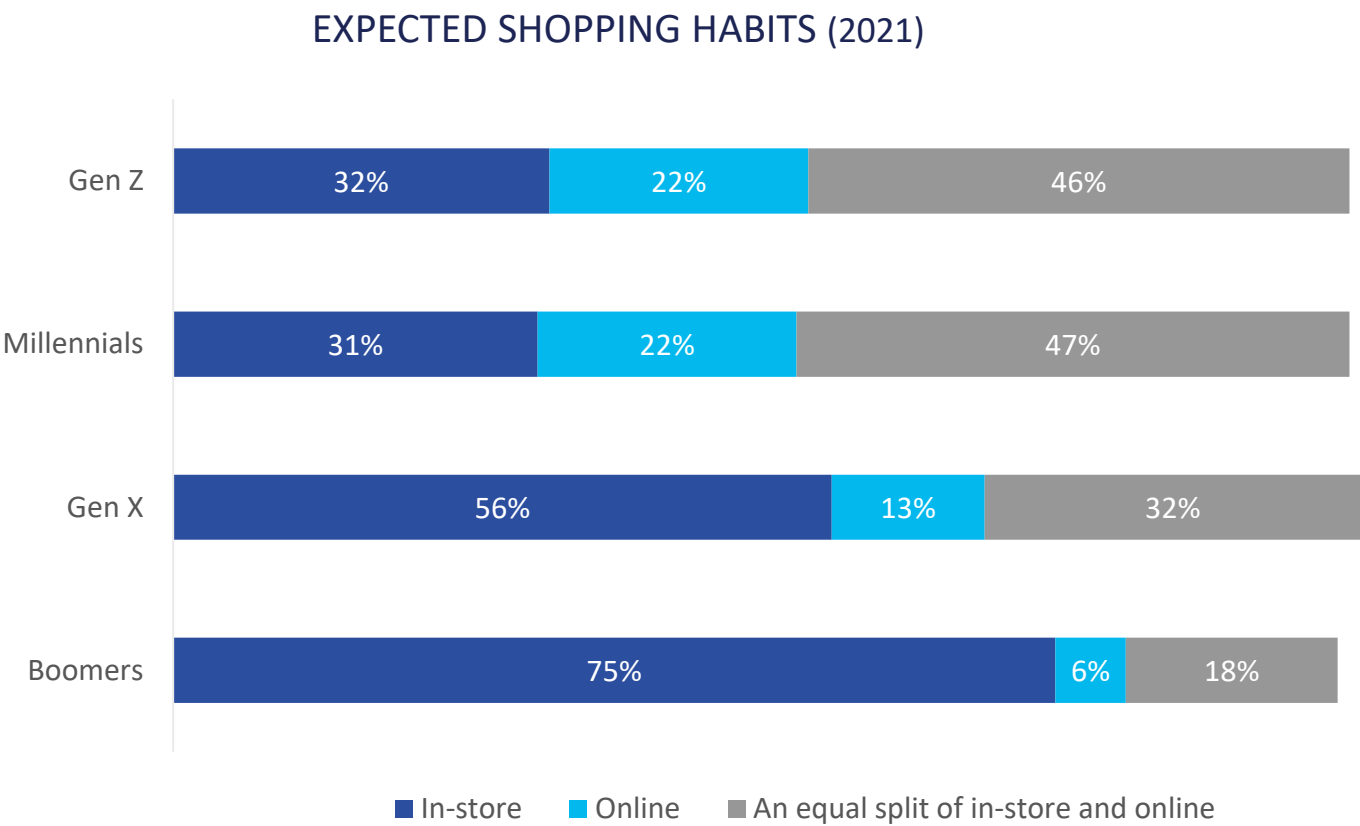Legend:
- Gen Z (14-25)
- Millennials (26-44)
- Gen X (45-56)
- Boomers (57-59)

Q5. What has frustrated you the most about your online buying experiences over the past year during the pandemic? *Rank the top 3.*

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Gen X and Boomers are headed back to in-store shopping; Millennials and Gen Z plan to continue shopping online

While some percentage of shoppers will maintain a mix, Gen Z and Millennials are most likely to do the majority of their shopping online (22%).

EXPECTED SHOPPING HABITS (2021)

Generation	In-store	Online	An equal split of in-store and online
Gen Z	32%	22%	46%
Millennials	31%	22%	47%
Gen X	56%	13%	32%
Boomers	75%	6%	18%

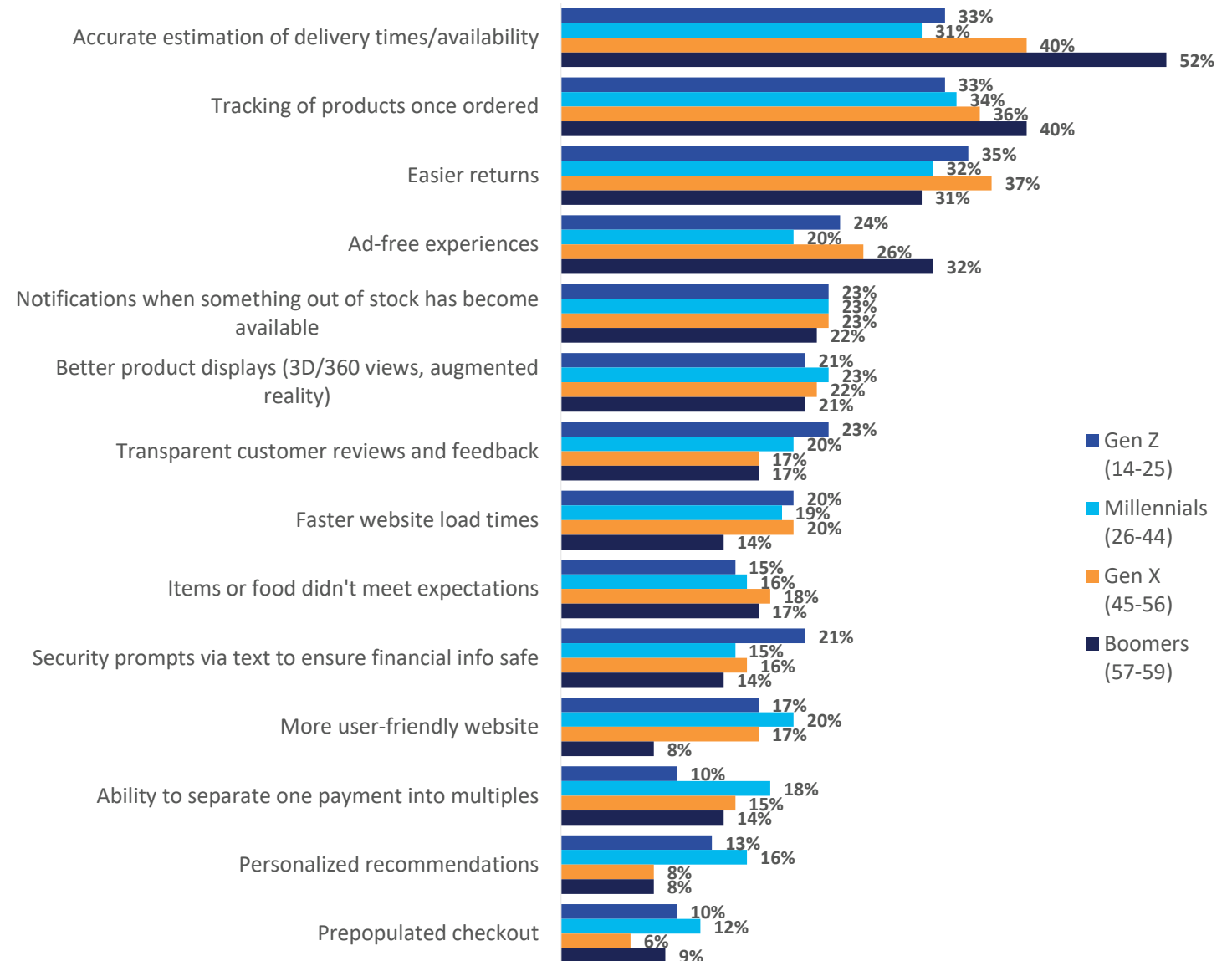■ In-store   ■ Online   ■ An equal split of in-store and online

Q6. Where will you do the majority of your shopping in the next year?
Select one.

Gen Z wants 3D displays more than they want security at checkout

Nearly a quarter of Gen Z and Millennials would like better product displays and transparent reviews.

IMPROVEMENTS TO SHOPPING ONLINE
(2021, Top 3 Ranking)

Accurate estimation of delivery times/availability
- Gen Z: 33%
- Millennials: 31%
- Gen X: 40%
- Boomers: 52%

Tracking of products once ordered
- Gen Z: 33%
- Millennials: 34%
- Gen X: 36%
- Boomers: 40%

Easier returns
- Gen Z: 35%
- Millennials: 32%
- Gen X: 37%
- Boomers: 31%

Ad-free experiences
- Gen Z: 24%
- Millennials: 20%
- Gen X: 26%
- Boomers: 32%

Notifications when something out of stock has become available
- Gen Z: 23%
- Millennials: 23%
- Gen X: 23%
- Boomers: 22%

Better product displays (3D/360 views, augmented reality)
- Gen Z: 21%
- Millennials: 23%
- Gen X: 22%
- Boomers: 21%

Transparent customer reviews and feedback
- Gen Z: 23%
- Millennials: 20%
- Gen X: 17%
- Boomers: 17%

Faster website load times
- Gen Z: 20%
- Millennials: 19%
- Gen X: 20%
- Boomers: 14%

Items or food didn't meet expectations
- Gen Z: 15%
- Millennials: 16%
- Gen X: 18%
- Boomers: 17%

Security prompts via text to ensure financial info safe
- Gen Z: 21%
- Millennials: 15%
- Gen X: 16%
- Boomers: 14%

More user-friendly website
- Gen Z: 17%
- Millennials: 20%
- Gen X: 17%
- Boomers: 8%

Ability to separate one payment into multiples
- Gen Z: 10%
- Millennials: 18%
- Gen X: 15%
- Boomers: 14%

Personalized recommendations
- Gen Z: 13%
- Millennials: 16%
- Gen X: 8%
- Boomers: 8%

Prepopulated checkout
- Gen Z: 10%
- Millennials: 12%
- Gen X: 6%
- Boomers: 9%

Legend:
- Gen Z (14-25)
- Millennials (26-44)
- Gen X (45-56)
- Boomers (57-59)

Q7. Based on your experiences over the past year during the pandemic, how would you most like your online buying experiences to change or improve? *Rank the top 3.*

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Top three online buying experiences that consumers want improved

Gen Z and Millennials see opportunities to improve the online shopping experience at nearly every stop in the user journey.

1 out of every 5 Millennials want the payment plan functionality.

17% of Gen Z, 20% of Millennials, and 17% of Gen X noted more user-friendly websites as top 3 change/improvement

23% of Gen Z and 20% of Millennials want transparent customer reviews and feedback in the top 3 changes/improvements

18% of Millennials indicated that the ability to separate one payment into three or four payments with no interest charges is a top 3 change/improvement

Q7. Based on your experiences over the past year during the pandemic, how would you most like your online buying experiences to change or improve? *Rank the top 3.*
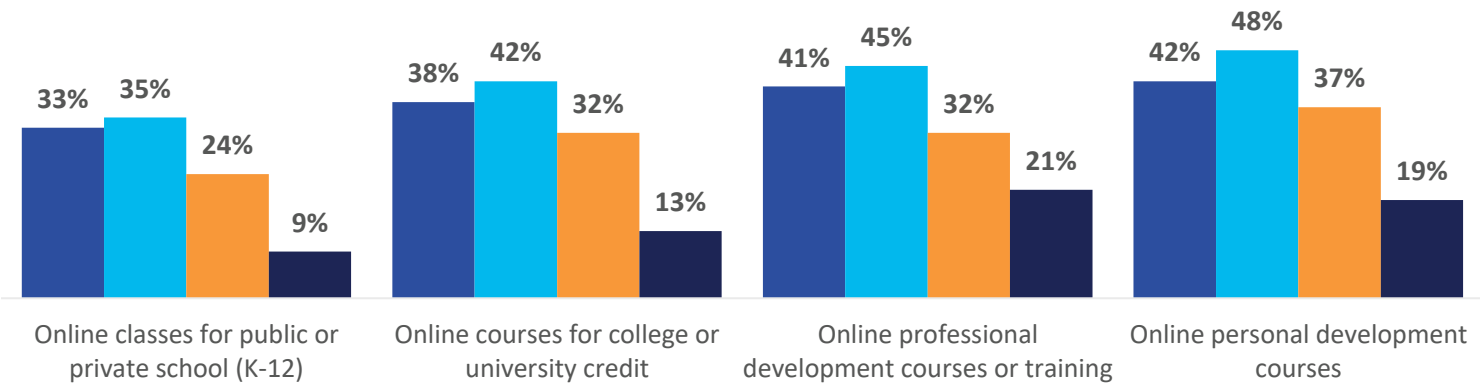
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15

Nearly half of Gen Z believe online learning is effective while half of Boomers don't have any experience with it

Nearly two thirds of Boomers and half of Gen X, have no experience with online learning – either personal or observed. Conversely, the vast majority of Gen Z and Millennials not only have experience with online learning but have experience with it in multiple settings.
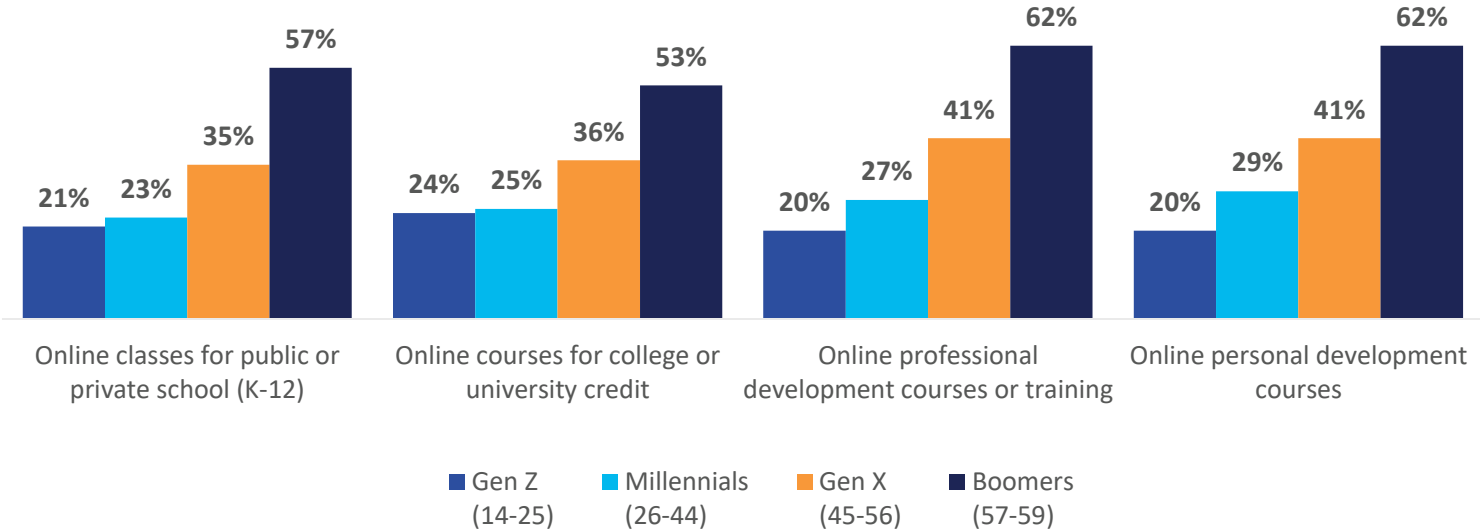
WOW STAT!

33% of Gen Z and **35% of Millennials** say they learn better in online school than in-person

EFFECTIVENESS OF ONLINE LEARNING
(2021, Top Two Box – Very effective & Effective)

	Gen Z	Millennials	Gen X	Boomers
Online classes for public or private school (K-12)	33%	35%	24%	9%
Online courses for college or university credit	38%	42%	32%	13%
Online professional development courses or training	41%	45%	32%	21%
Online personal development courses	42%	48%	37%	19%

NO EXPERIENCES WITH ONLINE LEARNING (2021)

	Gen Z	Millennials	Gen X	Boomers
Online classes for public or private school (K-12)	21%	23%	35%	57%
Online courses for college or university credit	24%	25%	36%	53%
Online professional development courses or training	20%	27%	41%	62%
Online personal development courses	20%	29%	41%	62%

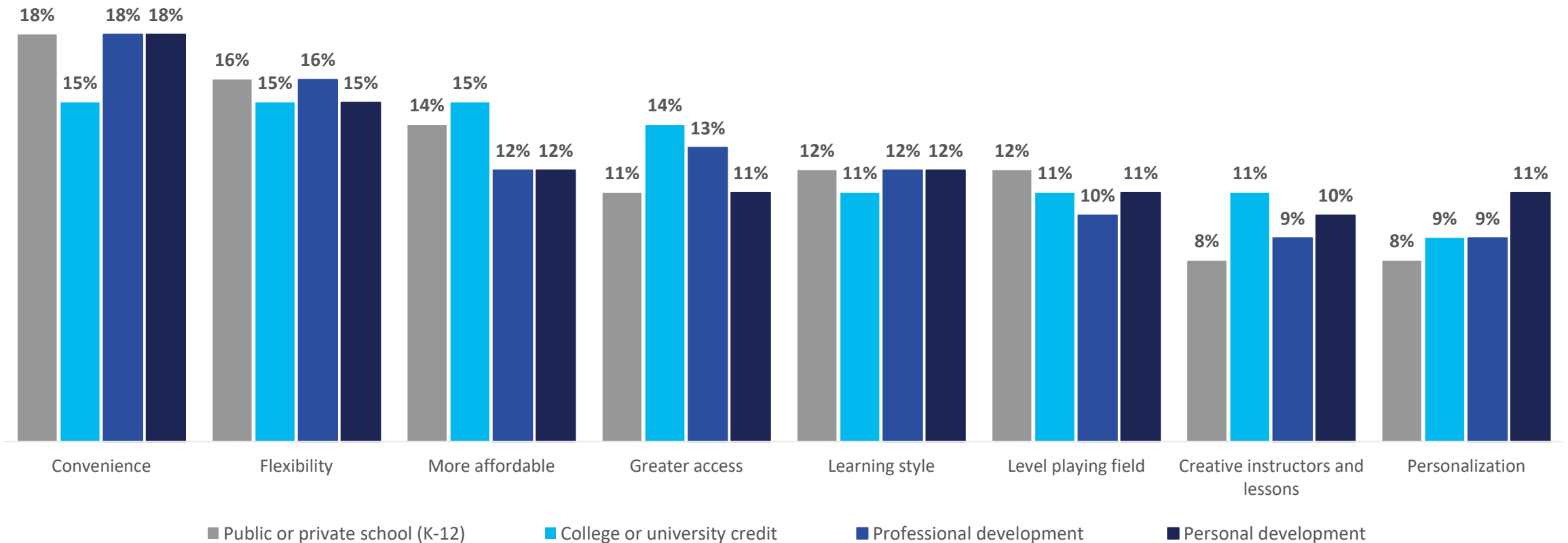■ Gen Z (14-25)   ■ Millennials (26-44)   ■ Gen X (45-56)   ■ Boomers (57-59)

Q8. What is your personal or observed experience with each of the following types of online or remote learning over the past year during the pandemic?
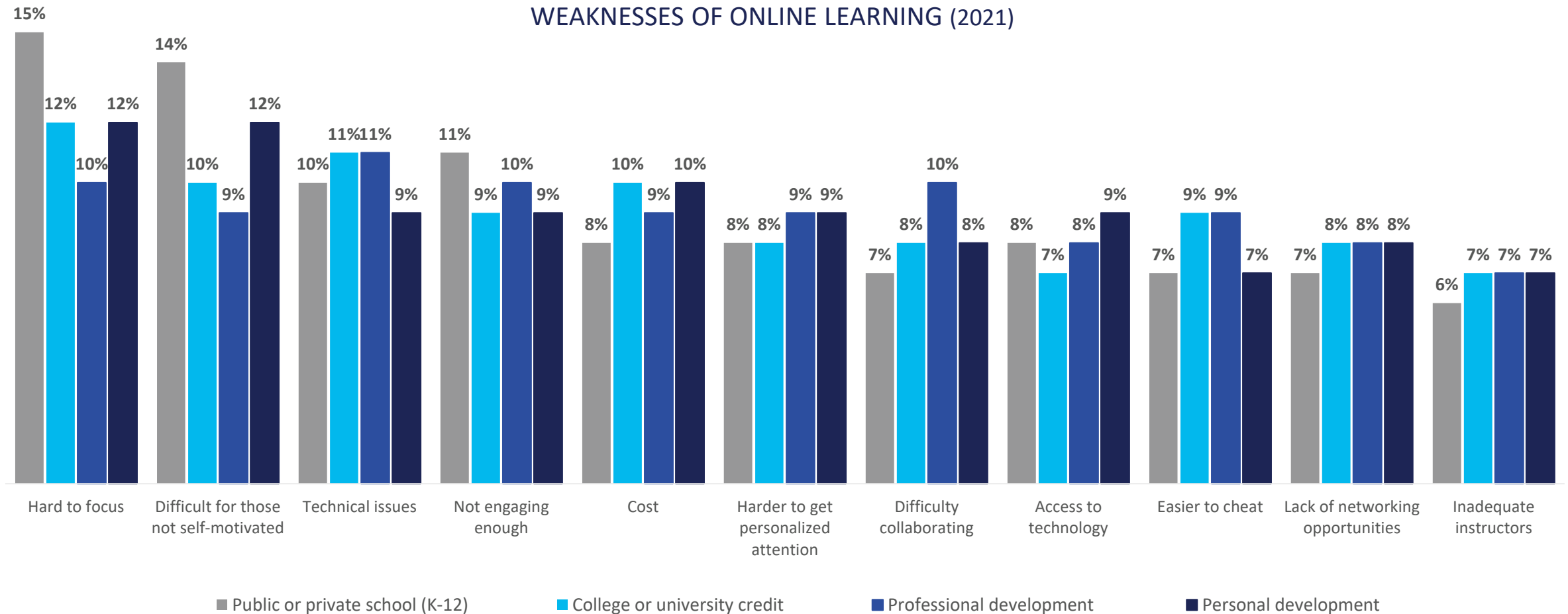
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Likes and dislikes with online learning modalities are as varied as Australians are; no one attribute rises to the top

There are noticeably few differences between generations, genders, and geographies for strengths and weaknesses of various online learning modalities.

STRENGTHS OF ONLINE LEARNING (2021)

Legend:
- ■ Public or private school (K-12)
- ■ College or university credit
- ■ Professional development
- ■ Personal development

Categories and values:

	Public or private school (K-12)	College or university credit	Professional development	Personal development
Convenience	18%	15%	18%	18%
Flexibility	16%	15%	16%	15%
More affordable	14%	15%	12%	12%
Greater access	11%	14%	13%	11%
Learning style	12%	11%	12%	12%
Level playing field	12%	11%	10%	11%
Creative instructors and lessons	8%	11%	9%	10%
Personalization	8%	9%	9%	11%

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There is no single, consistent, statistically significant dislike with online learning

WEAKNESSES OF ONLINE LEARNING (2021)

Hard to focus: 15%, 12%, 10%, 12%
Difficult for those not self-motivated: 14%, 10%, 9%, 12%
Technical issues: 10%, 11%, 11%, 9%
Not engaging enough: 11%, 9%, 10%, 9%
Cost: 8%, 10%, 9%, 10%
Harder to get personalized attention: 8%, 8%, 9%, 9%
Difficulty collaborating: 7%, 8%, 10%, 8%
Access to technology: 8%, 7%, 8%, 9%
Easier to cheat: 7%, 9%, 9%, 7%
Lack of networking opportunities: 7%, 8%, 8%, 8%
Inadequate instructors: 6%, 7%, 7%, 7%

Legend: Public or private school (K-12) · College or university credit · Professional development · Personal development

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18

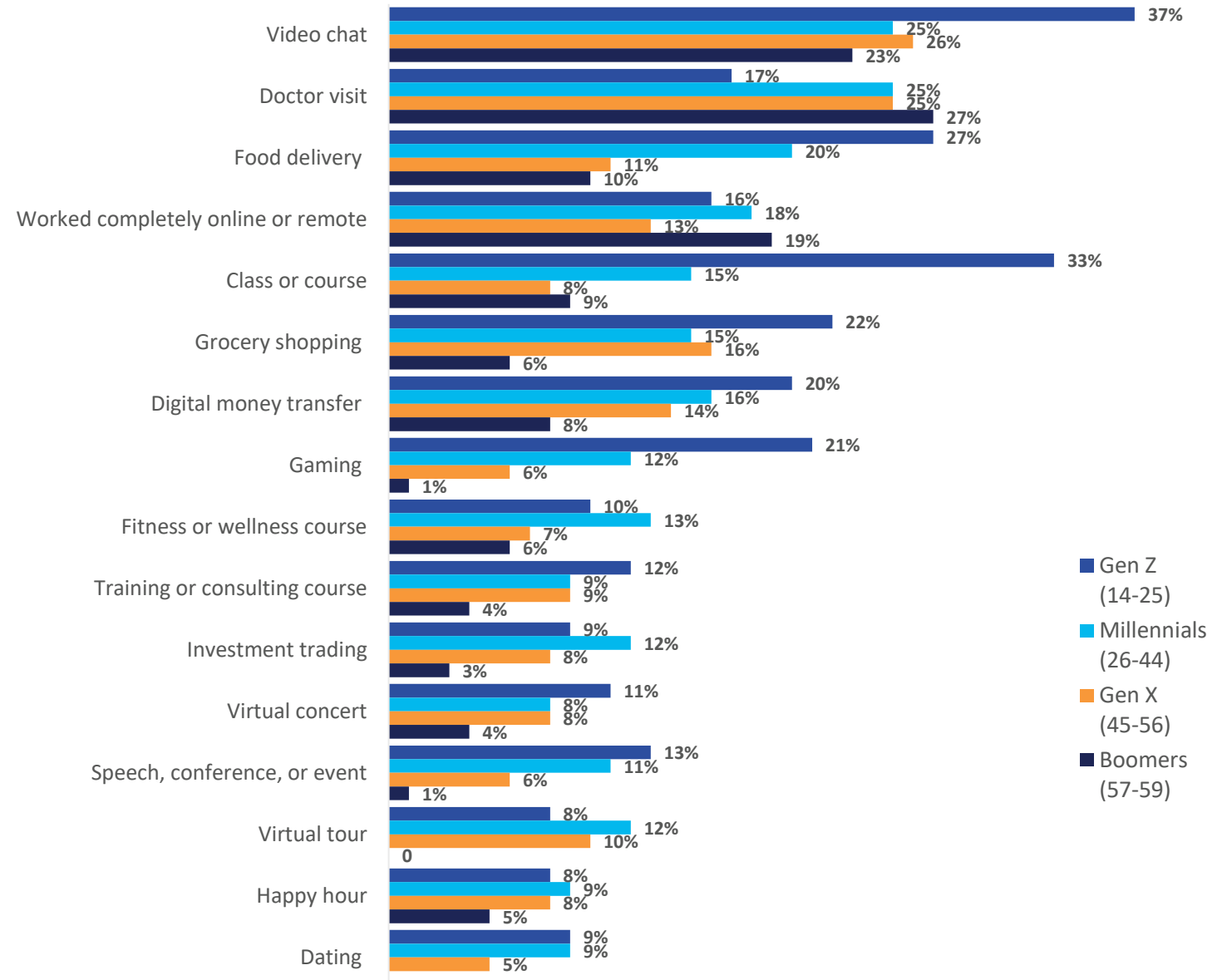# Gen Z and Millennials had a _lot_ of "firsts" during the pandemic

During the pandemic, approximately 1/3 of Gen Z tried online video chatting. One-third of them also had their first online class experience and first online food delivery. Approximately 1/4 of Gen Z also tried online gaming, online grocery shopping, and online/digital money transfer.

WOW STAT!

Approximately **1/4 of Gen Z** ordered food delivery online for the first time during the pandemic.
1/3 of Gen Z will continue food delivery following the pandemic

ONLINE ACTIVITIES TRIED FOR FIRST TIME IN PANDEMIC (2021)

Activity	Gen Z (14-25)	Millennials (26-44)	Gen X (45-56)	Boomers (57-59)
Video chat	37%	25%	26%	23%
Doctor visit	17%	25%	25%	27%
Food delivery	27%	20%	11%	10%
Worked completely online or remote	16%	18%	13%	19%
Class or course	33%	15%	8%	9%
Grocery shopping	22%	15%	16%	6%
Digital money transfer	20%	16%	14%	8%
Gaming	21%	12%	6%	1%
Fitness or wellness course	10%	13%	7%	6%
Training or consulting course	12%	9%	9%	4%
Investment trading	9%	12%	8%	3%
Virtual concert	11%	8%	8%	4%
Speech, conference, or event	13%	11%	6%	1%
Virtual tour	8%	12%	10%	0
Happy hour	8%	9%	8%	5%
Dating	9%	9%	5%	

Q11. Which of the following have you done online for the first time over the past year during the pandemic?
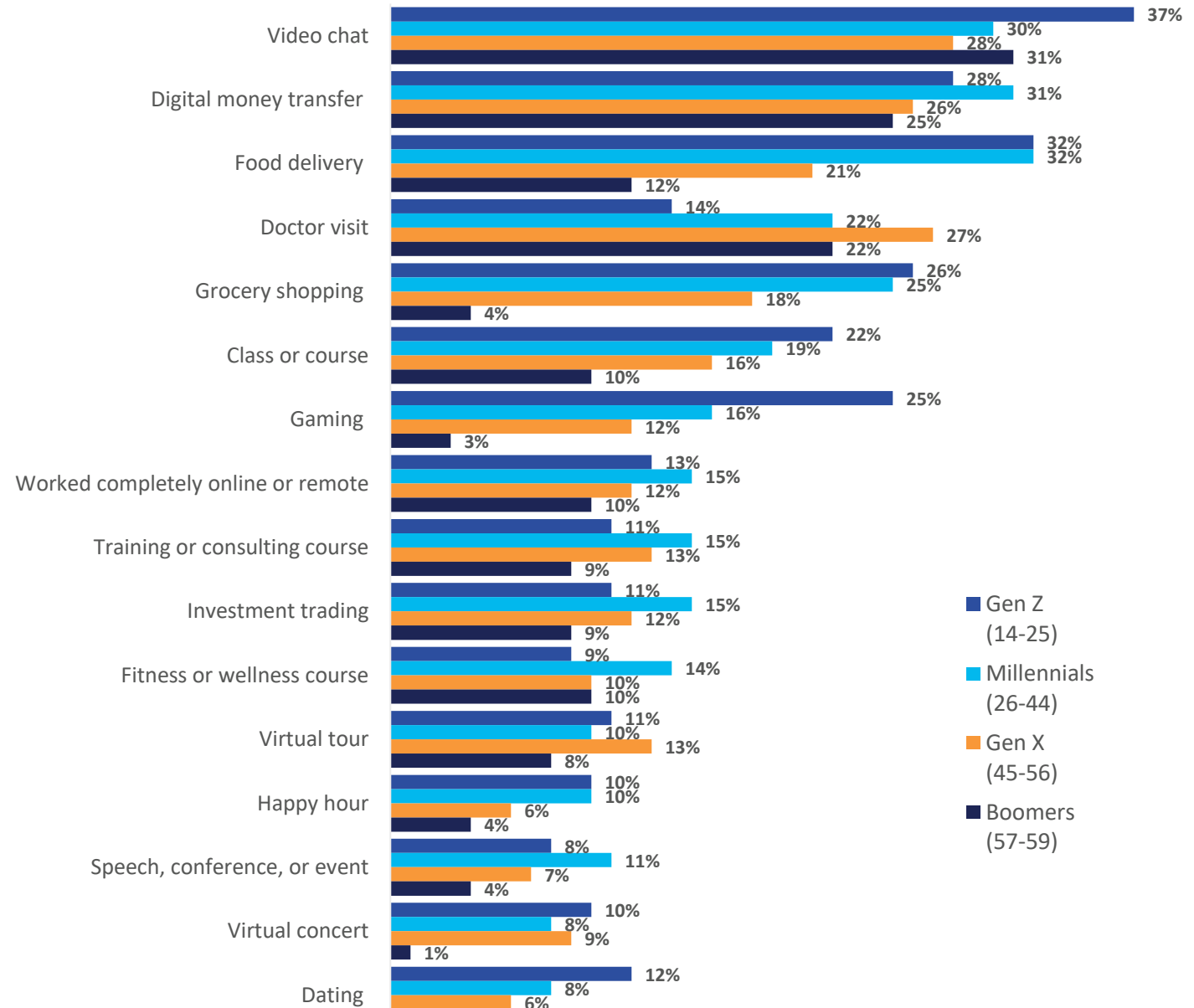
CGK

Younger generations will stay online for conveniences; Boomers will stay online for video chats

Online amenities like food delivery and money transfers are here to stay. 32% Gen Z and 32% Millennials will continue to order food delivery online. 28% Gen Z and 31% Millennials will continue digital money transfers.

WOW STAT!

61% Gen Z and **69% Millennials** expect to maintain their new digital habits and behaviors after the pandemic. (Q24)

ONLINE ACTIVITIES PERSISTING POST-PANDEMIC (2021)

Activity	Gen Z (14-25)	Millennials (26-44)	Gen X (45-56)	Boomers (57-59)
Video chat	37%	30%	28%	31%
Digital money transfer	28%	31%	26%	25%
Food delivery	32%	32%	21%	12%
Doctor visit	14%	22%	27%	22%
Grocery shopping	26%	25%	18%	4%
Class or course	22%	19%	16%	10%
Gaming	25%	16%	12%	3%
Worked completely online or remote	13%	15%	12%	10%
Training or consulting course	11%	15%	13%	9%
Investment trading	11%	15%	12%	9%
Fitness or wellness course	9%	14%	10%	10%
Virtual tour	11%	10%	13%	8%
Happy hour	10%	10%	6%	4%
Speech, conference, or event	8%	11%	7%	4%
Virtual concert	10%	8%	9%	1%
Dating	12%	8%	6%	

Q12. Do you anticipate you will continue participating in any of these online activities following the pandemic?
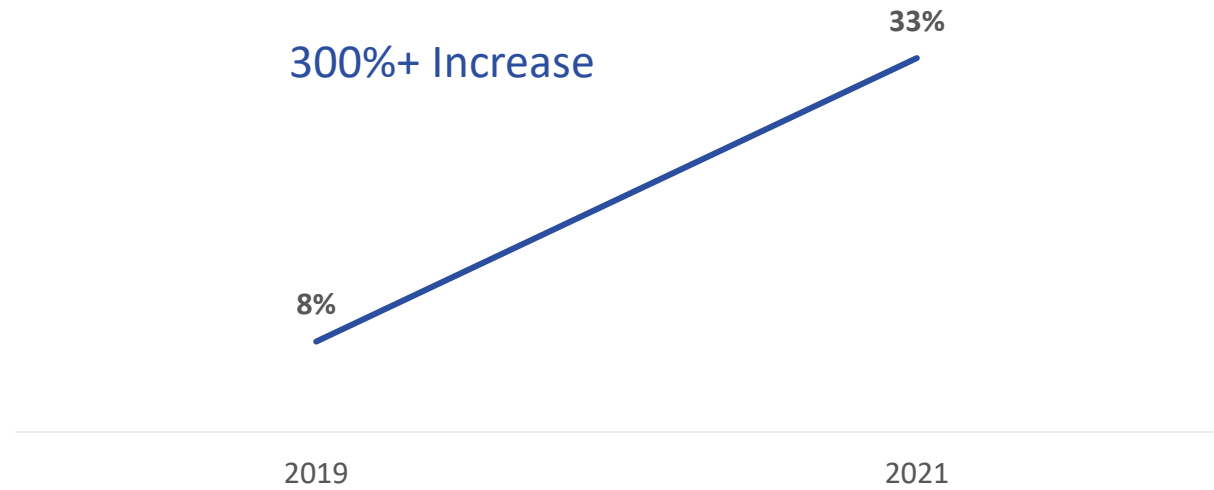
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In less than two years, website ownership has increased more than 300%

Millennials and Older Gen Z (18-25) are leading the charge on personal websites, especially compared to Gen X (18% own website).
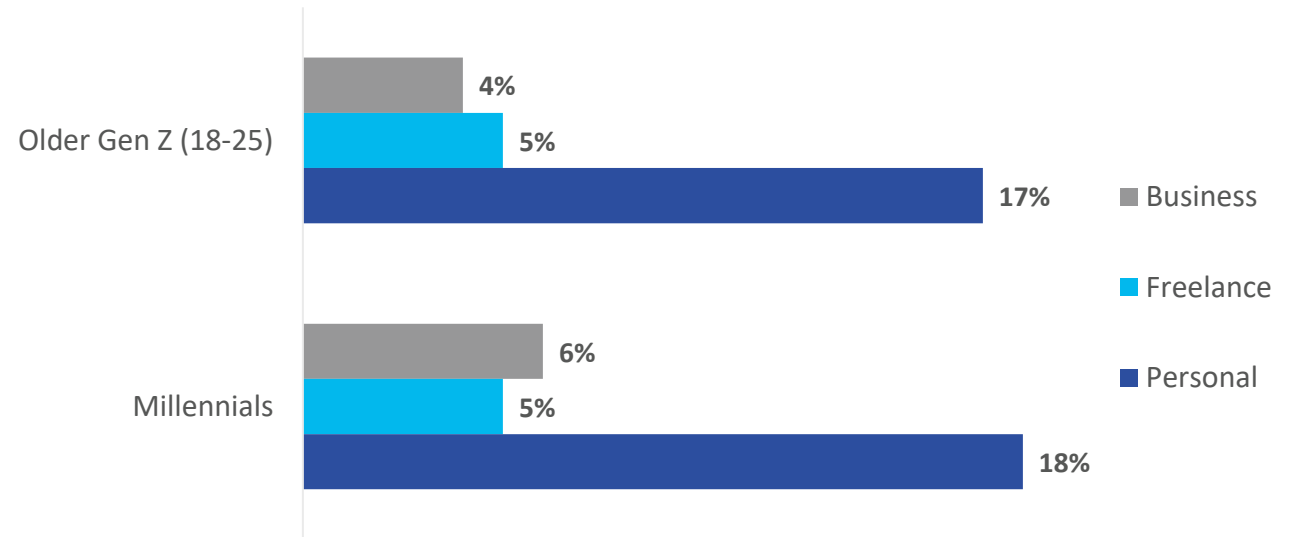
WOW STAT!

25% of older Gen Z and
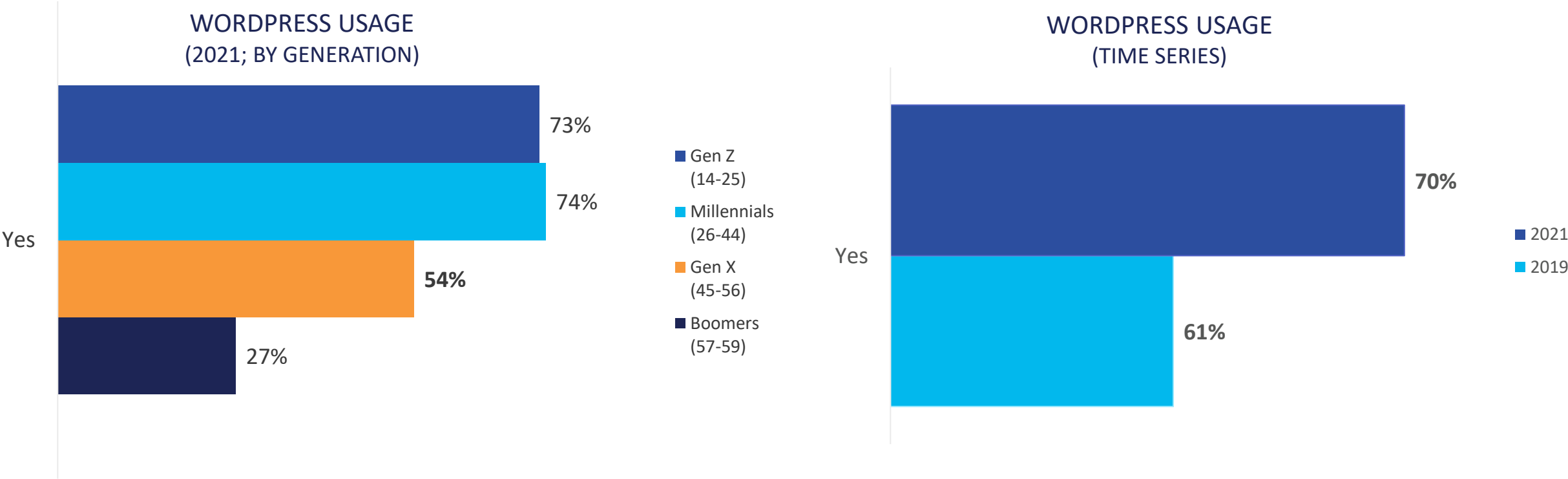**28% of Millennials** have a website.

WEBSITE OWNERSHIP, TIME SERIES

300%+ Increase

33%

8%

2019   2021

TYPE OF WEBSITE OWNED (2021)

Older Gen Z (18-25)
- Business: 4%
- Freelance: 5%
- Personal: 17%

Millennials
- Business: 6%
- Freelance: 5%
- Personal: 18%

■ Business
■ Freelance
■ Personal

Q13. Do you own a website?

Growth in WordPress usage driven by Millennials and Gen Z

3/4 of those that have a website report using WordPress in some fashion for their website. Usage of WordPress, whether personal or outsourced, has increased 15% since 2019. Growth driven by Millennials and Gen Z, with Gen X following.

WORDPRESS USAGE
(2021; BY GENERATION)

Yes
- 73%
- 74%
- **54%**
- 27%

Legend:
- Gen Z (14-25)
- Millennials (26-44)
- Gen X (45-56)
- Boomers (57-59)

WORDPRESS USAGE
(TIME SERIES)

Yes
- **70%**
- **61%**

Legend:
- 2021
- 2019

Q14. Have you ever personally used, worked with someone else, or hired someone to use WordPress for your website?

RISE
DIGITAL PERSPECTIVE
LOOKING FORWARD

The pandemic has forever changed shopping

In the next 5 years, 55% of gen Z and 57% of millennials expect to
do the majority of their
shopping online.

64% of Gen Z, **69% of Millennials**, and **60% of Gen X** feel more confident buying things online than ever before
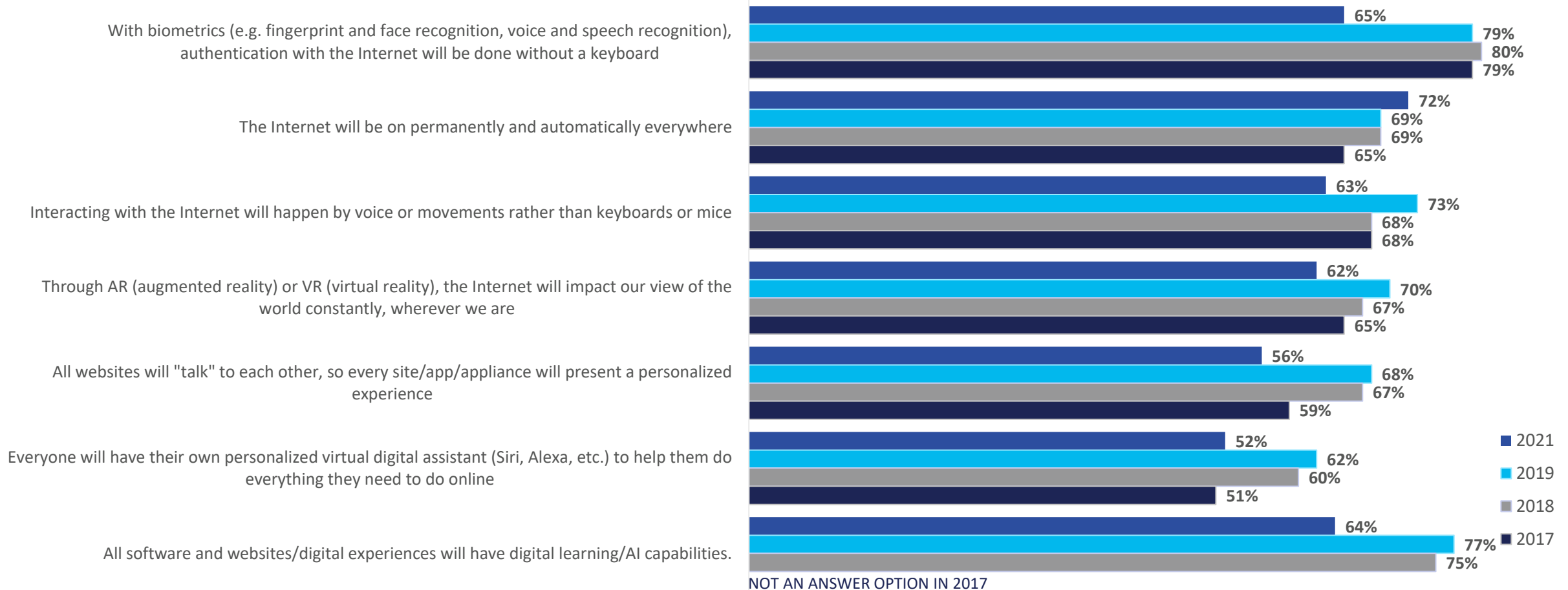
77% of Gen Z, **78% of Millennials** believe, in the next 5 years, online buying will only become easier and more user-friendly.
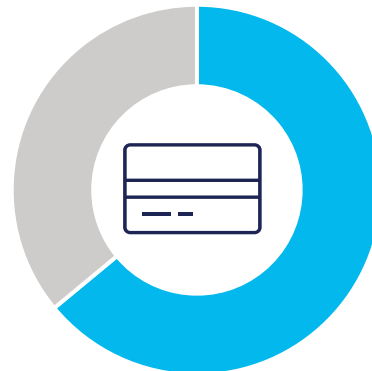
64% of Millennials think shopping habits they've picked up during the pandemic will stay with them even after the pandemic

Q23,24: Select True or False for each of the following questions. *Select one per row.*

Compared to years past, Australians are slightly more conservative in their vision of future website functionality

5 YEAR WEBSITE FUNCTIONALITY EXPECTATIONS, TIME SERIES

With biometrics (e.g. fingerprint and face recognition, voice and speech recognition), authentication with the Internet will be done without a keyboard
- 2021: 65%
- 2019: 79%
- 2018: 80%
- 2017: 79%

The Internet will be on permanently and automatically everywhere
- 2021: 72%
- 2019: 69%
- 2018: 69%
- 2017: 65%

Interacting with the Internet will happen by voice or movements rather than keyboards or mice
- 2021: 63%
- 2019: 73%
- 2018: 68%
- 2017: 68%

Through AR (augmented reality) or VR (virtual reality), the Internet will impact our view of the world constantly, wherever we are
- 2021: 62%
- 2019: 70%
- 2018: 67%
- 2017: 65%

All websites will "talk" to each other, so every site/app/appliance will present a personalized experience
- 2021: 56%
- 2019: 68%
- 2018: 67%
- 2017: 59%

Everyone will have their own personalized virtual digital assistant (Siri, Alexa, etc.) to help them do everything they need to do online
- 2021: 52%
- 2019: 62%
- 2018: 60%
- 2017: 51%

All software and websites/digital experiences will have digital learning/AI capabilities.
- 2021: 64%
- 2019: 77%
- 2018: 75%

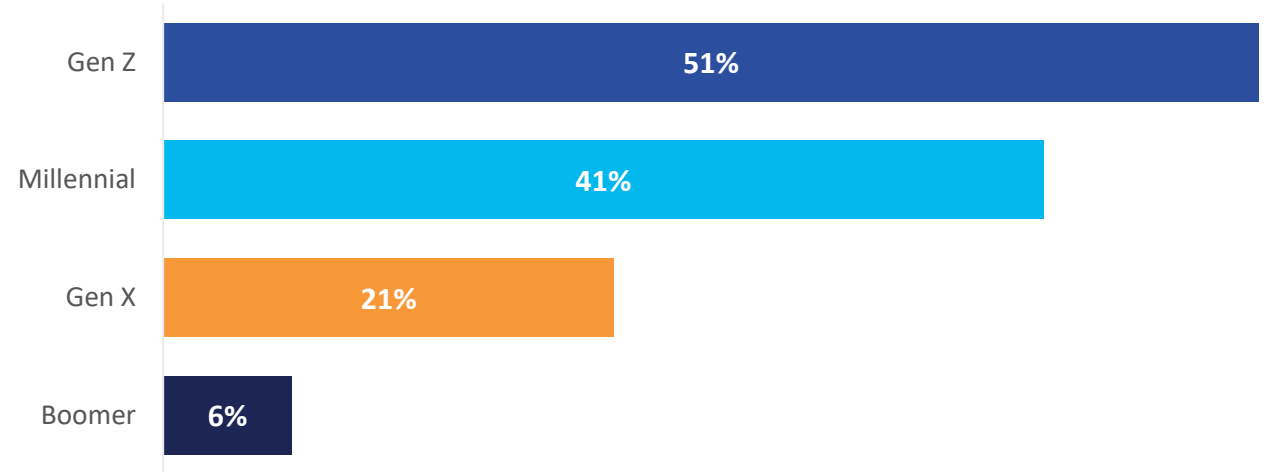NOT AN ANSWER OPTION IN 2017

Legend: ■ 2021 ■ 2019 ■ 2018 ■ 2017

Q15. When thinking about how websites might function 5 years from now, do you think the following statements will be true or false?
*Answered true*

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25

Millennials have much higher expectations around future website functionality than other generations

In a departure from years past, Gen Z is less optimistic than Millennials on nearly every front. For all other functional expectations, Millennials and Gen Z are significantly more optimistic than Gen X and Boomers.

WOW STAT!

67% of Millennials think all software and websites/digital experiences will have AI capabilities five years from now.

5 YEAR WEBSITE FUNCTIONALITY EXPECTATIONS (2021)

The Internet will be on permanently and automatically everywhere
- 72%
- 73%
- 72%
- 61%

With biometrics (e.g. fingerprint and face recognition, voice and speech recognition), authentication with the Internet will be done without a keyboard
- 63%
- 66%
- 65%
- 61%

Interacting with the Internet will happen by voice or movements rather than keyboards or mice
- 69%
- 62%
- 61%
- 55%

All software and websites/digital experiences will have digital learning/AI capabilities.
- 58%
- 67%
- 65%
- 55%

Through AR (augmented reality) or VR (virtual reality), the Internet will impact our view of the world constantly, wherever we are
- 67%
- 65%
- 59%
- 45%

All websites will "talk" to each other, so every site/app/appliance will present a personalized experience
- 58%
- 58%
- 55%
- 39%

Everyone will have their own personalized virtual digital assistant (Siri, Alexa, etc.) to help them do everything they need to do online
- 54%
- 56%
- 48%
- 40%

Legend:
- Gen Z (14-25)
- Millennials (26-44)
- Gen X (45-56)
- Boomers (57-59)

Q15. When thinking about how websites might function 5 years from now, do you think the following statements will be true or false? *Answered true.*

26

![CGK logo]

Each generation is more entrepreneurial than the last

While intentions of entrepreneurship vary significantly by generation, the level of entrepreneurship among Gen Z and Millennials have stayed consistent from 2019.

FUTURE PLANS TO START A BUSINESS
(2021, Yes Summary)

Gen Z	51%
Millennial	41%
Gen X	21%
Boomer	6%

FUTURE PLANS TO START A BUSINESS, TIME SERIES

Yes/Possibly
- 46% (2021)
- 46% (2019)
- 36% (2018)
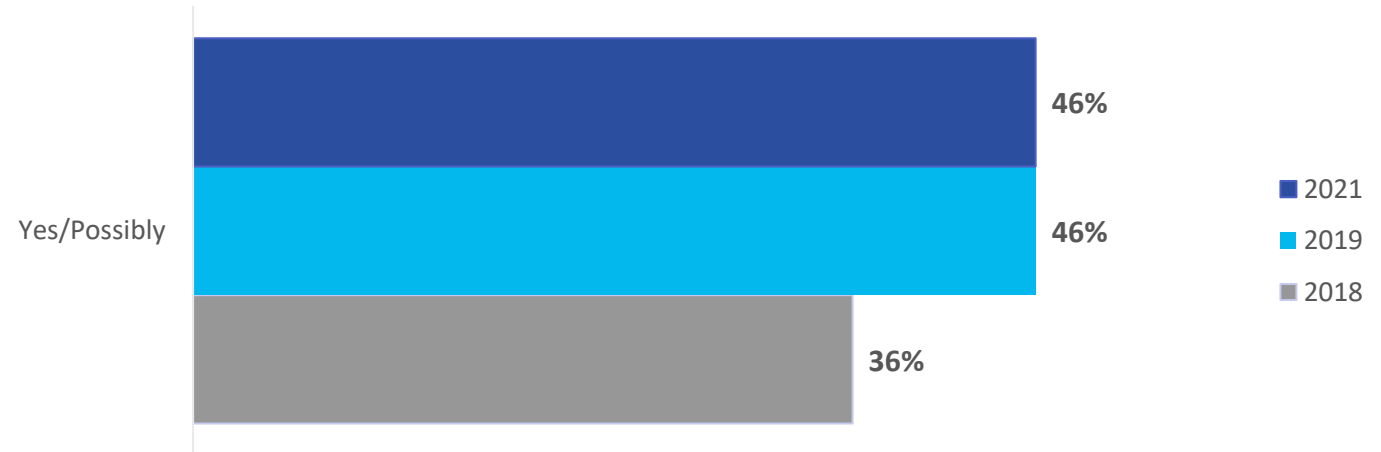
■ 2021
■ 2019
■ 2018

*Q17 programmed as "Yes" only for 2021.

Q17. Do you plan to start your own business sometime in the future? *Select one*.

Gen Z still interested in retail focused businesses while Millennials and Gen X lean into tech

Beauty and Wellness makes the Top 3 list for the first time with Gen Z.

Millennials are still planning for retail, but in fewer instances. **Interest in retail, among Millennials, has fallen since 2019 and 2018**, when it was at 32% and 31% respectively.

Almost triple the Millennials are now thinking about a technology business (7% in 2019 v. 20% in 2021).

	2021	2019
GEN Z (2021; n = 143)	Retail 25% Entertainment 22% Beauty and Wellness 21%	Retail 24% Insurance 16% Healthcare 12%
MILLENNIALS (2021; n = 207)	Technology 20% Retail 17% Other 15%	Retail 32% Insurance 17% Healthcare 10%
GEN X (2021; n = 67)	Manufacturing 18% Technology 16% Other 12%	Retail 23% Insurance 13% Healthcare 12%
BOOMERS (2021; n = 10)	Professional Services 40%	Retail 18% Insurance 18% Healthcare 18%

Q18. What type of business do you plan on starting in the future? *Select all that apply.*

Call it trepidation or recognition, Millennials see more implications from their online activity than do other generations

Opinions of Gen Z, Millennials, and Gen X have largely remained similar since 2019. Significantly fewer Gen X and Boomers see implications of online activities in 5 years.

In 5 years, do you think you will worry that your online actions, including social media posts and past purchases, will affect your job offers?
- Gen Z: 67%
- Millennials: 61%
- Gen X: 61%
- Boomers: 53%

In 5 years, do you think your online reputation will determine your dating options?
- Gen Z: 53%
- Millennials: 52%
- Gen X: 43%
- Boomers: 35%

In 5 years, do you think your online reputation will determine whether you can get a loan to buy a car or a house?
- Gen Z: 60%
- Millennials: 51%
- Gen X: 56%
- Boomers: 51%

In 5 years, do you think web sites will become more human in experience by exhibiting emotions when you visit and interact with their pages?
- Gen Z: 56%
- Millennials: 56%
- Gen X: 49%
- Boomers: 39%

In 5 years, do you think websites will know what you are looking for before you tell them?
- Gen Z: 59%
- Millennials: 55%
- Gen X: 57%
- Boomers: 45%

Legend:
- Gen Z (14-25)
- Millennials (26-44)
- Gen X (45-56)
- Boomers (57-59)

Q20. Please answer yes or no to each of the questions below.

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Gen Z and Millennials are carrying Australia's social conscience

While an affinity to social causes has stayed the same among Gen Z and Millennials, the gap between younger and older generations has increased over the last few years. Gen X has decreased their cause-driven purchasing modestly since 2019, while Boomers have dramatically decreased, 22% in the past two years (60% in 2019).

WOW STAT!

40% Gen Z and **25% Millennials** get information about the social causes a company supports from social media

PURCHASE PREFERENCE FOR SOCIAL CAUSES (2021)

Gen Z (14-25) — 71%
Millennials (26-44) — 61%
Gen X (45-56) — 56%
Boomers (57-59) — 47%
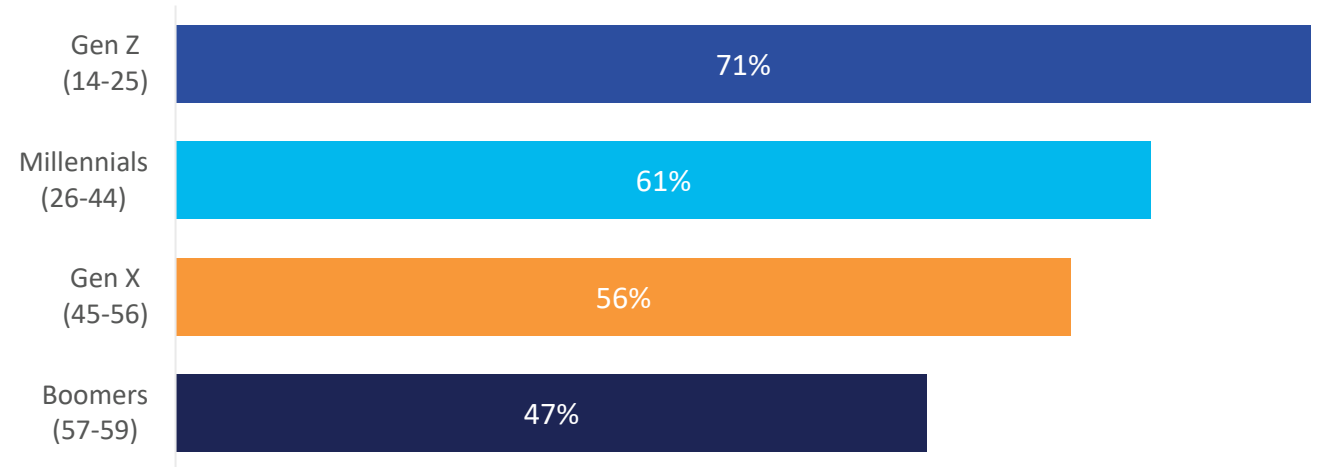
PURCHASE PREFERENCE FOR SOCIAL CAUSES, TIME SERIES

Yes
- 2021: 61%
- 2019: 66%
- 2018: 55%

■ 2021
■ 2019
■ 2018
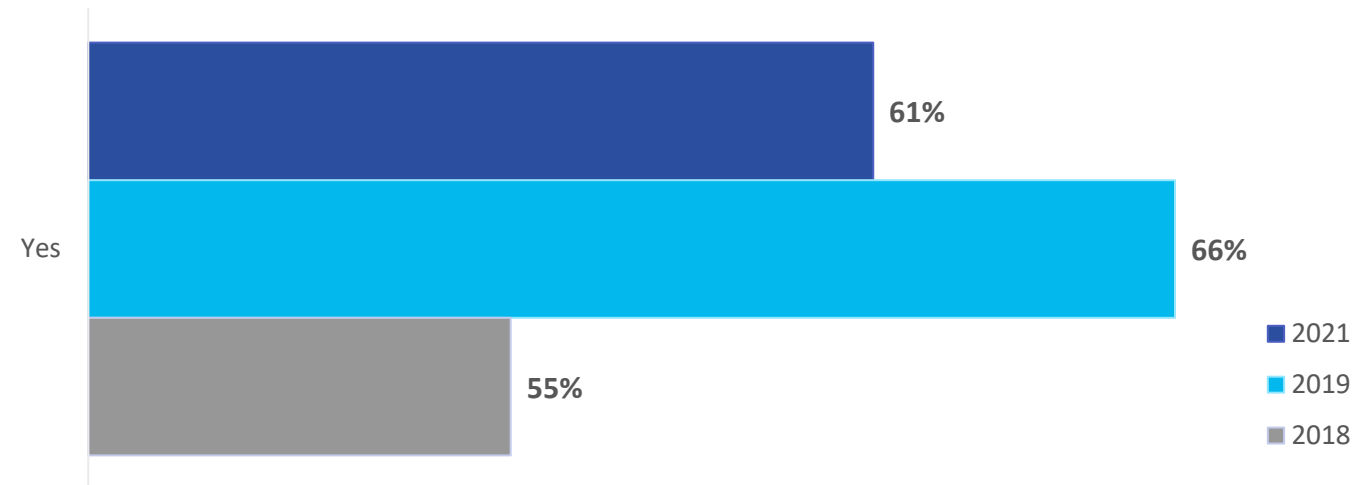
Q21. Are you more likely to buy from a company that contributes to social causes?

Technology is great, but burnout is real, especially among those that use it the most

Millennials are relying on technology more than any other generation and feeling the effects of that. **Nearly 2/3 of Gen Z and Millennials** report that they plan to reduce the amount of time they spend online in the future.

"I rely on technology now more than ever before"

Gen Z – 69%
Millennials – 72%

"I am more comfortable with technology now than I was before the pandemic"

Gen Z – 65%
Millennials – 63%

"Moving forward, I want to reduce the time I spend online"

Gen Z – 62%
Millennials – 59%

The pandemic has increased technology reliance and facilitated greater connections

Gen Z and Millennials are relying more on technology, and better connecting to the world and friends because of it.

WOW STAT!

54% of Gen Z made a new friend online during the pandemic.

I rely on technology now more than ever before.
- Gen Z: 69%
- Millennials: 72%
- Gen X: 65%
- Boomers: 57%

Due to technology, I feel more connected than ever to the world around me.
- Gen Z: 63%
- Millennials: 64%
- Gen X: 62%
- Boomers: 53%

I made new friends online during the pandemic due to my reliance on technology.
- Gen Z: 54%
- Millennials: 42%
- Gen X: 30%
- Boomers: 16%

Legend:
- Gen Z (14-25)
- Millennials (26-44)
- Gen X (45-56)
- Boomers (57-59)

Q23,24: Select True or False for each of the following questions. *Answered true*.

cgk
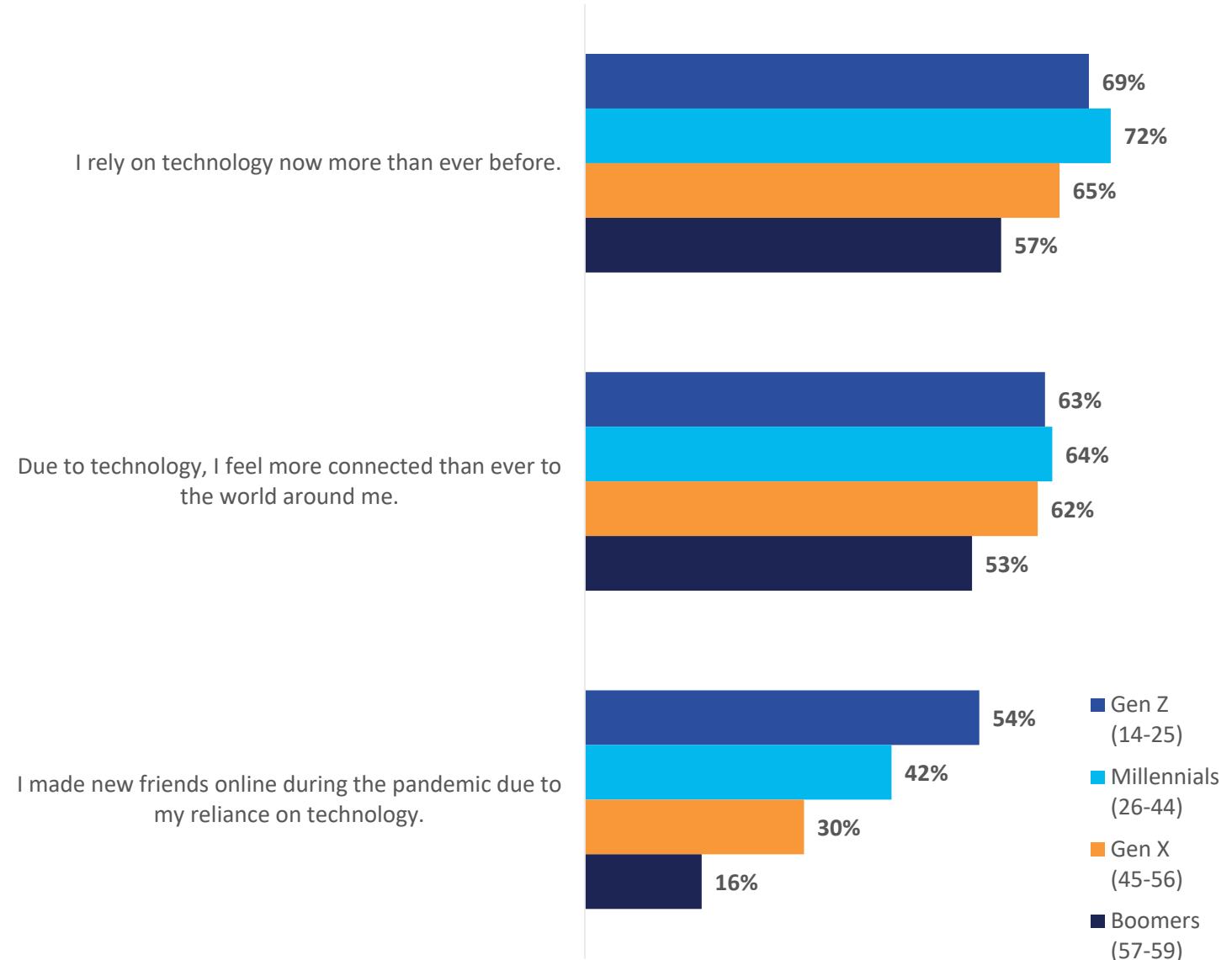
Millennials are optimistic about the Internet's ability to connect despite geographical boundaries

67% of Gen Z
66% of Millennials
61% of Gen X
53% of Boomers

"believe the Internet brings people together more than it divides them"

63% of Gen Z
64% of Millennials
62% of Gen X
55% of Boomers

"feel more connected than ever to the world around me" due to technology

66% of Gen Z
78% of Millennials
63% of Gen X
60% of Boomers

are "optimistic about how technology will impact the next 5 years of our communities and world"

Remote learning has promoted better learning and higher productivity

The consensus is that the pandemic has changed the way we learn.
Gen Z and Millennials have leaned into that with nearly half of both generations noting better learning and productivity.

70% of Gen Z
73% of Millennials
74% of Gen X

"think learning will be forever changed because of the pandemic"

53% of Gen Z
49% of Millennials

"learn better through online school than in-person"

54% of Gen Z
49% of Millennials
33% of Gen X
30% of Boomers

were *"more productive at work or school during the pandemic than before"*

The pandemic has changed learning and working, and majority of Gen X and Millennials hope it stays changed

That said, younger generations are more likely to think remote working has stunted their career growth, while older generations were dramatically less impacted career-wise and unaffected balance wise.

WOW STAT!

63% of Gen Z and **53% of Millennials** believe their relationships (personal, work, school) suffered, compared to 44% Gen X and 38% Boomers.

53% of Gen Z, 58% of Millennials, and 41% of Gen X would prefer to continue remote work or remote school after the pandemic.

51% of Gen Z and 52% of Millennials prefer online meetings (Zoom, Skype, FaceTime, Microsoft Teams, etc.) for work or school to in-person meetings.

50% of Gen Z and 39% of Millennials believe remote work stunted their careers, compared to 32% Gen X and 12% Boomers. Conversely, 46% of Gen Z and 56% of Millennials believe work life balance improved.

APPENDIX

Methodology

CUSTOM 24-QUESTION SURVEY COMPLETED BY

1,000

AUSTRALIAN PARTICIPANTS
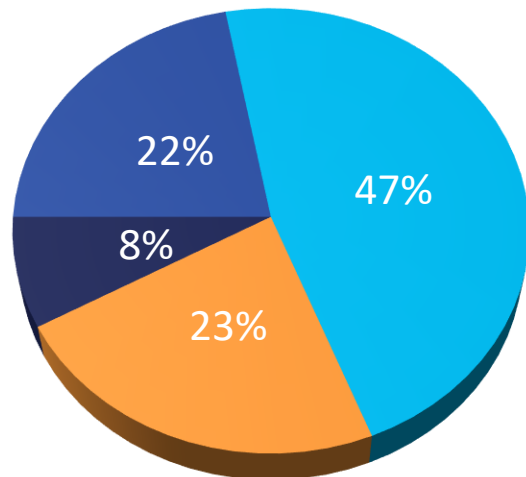
22% GEN Z (AGES 14-25)

47% MILLENNIALS (AGES 26-44)

23% GEN X (AGES 45 - 56)

8% BOOMERS (AGES 57-59)

Pie chart: 47%, 23%, 8%, 22%

61% URBAN

28% SUBURBAN

12% RURAL

49% MALE

50% FEMALE

1% Non-binary | 0% Prefer not to answer

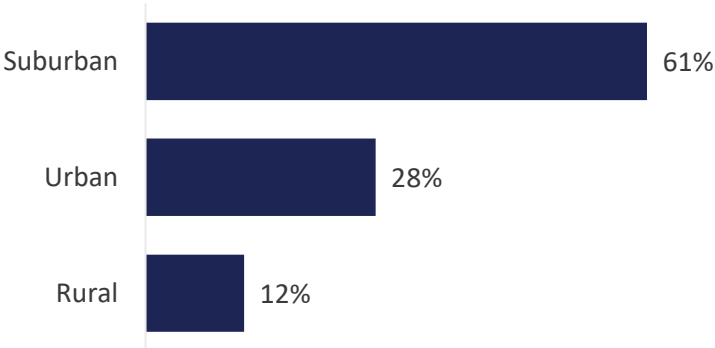*The sample was weighted to the Australian Census for age, region, gender, and ethnicity

*Figures are statistically significant at the 95% confidence level. Margin of error is +/-3.1 percentage points.

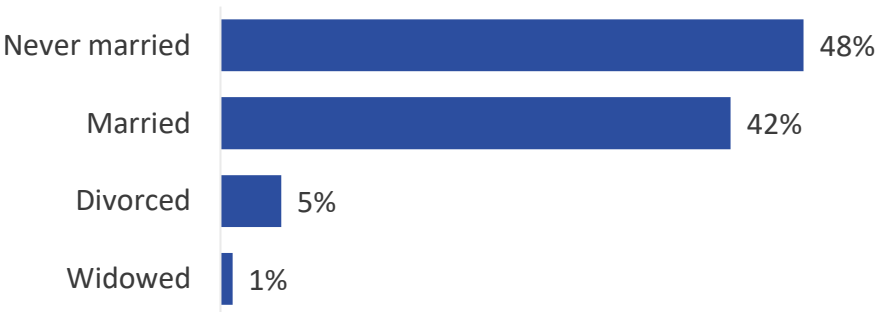*Survey was conducted online from May 4th, 2021 to May 19th, 2021.

*12 repeated benchmark questions (2017, 2018, 2019, 2021); 12 new questions

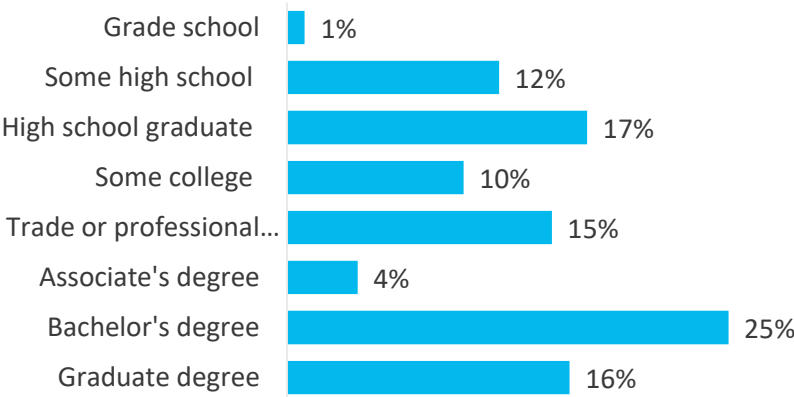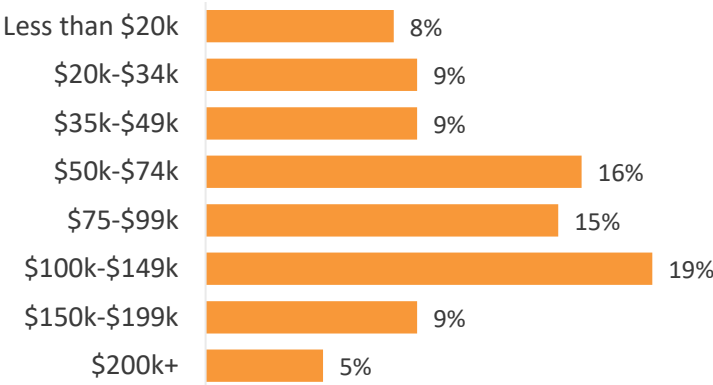# Sample Overview

AREA YOU LIVE

- Suburban: 61%
- Urban: 28%
- Rural: 12%

MARITAL STATUS

- Never married: 48%
- Married: 42%
- Divorced: 5%
- Widowed: 1%

3% Prefer not to answer

HIGHEST LEVEL OF EDUCATION

- Grade school: 1%
- Some high school: 12%
- High school graduate: 17%
- Some college: 10%
- Trade or professional...: 15%
- Associate's degree: 4%
- Bachelor's degree: 25%
- Graduate degree: 16%

2% Prefer not to answer

ANNUAL HOUSEHOLD INCOME

- Less than $20k: 8%
- $20k-$34k: 9%
- $35k-$49k: 9%
- $50k-$74k: 16%
- $75-$99k: 15%
- $100k-$149k: 19%
- $150k-$199k: 9%
- $200k+: 5%

11% Prefer not to answer

WP Engine Generation Resilience Report 2021 Australian Data

For further information please contact the WP Engine team at Zeno Group Australia

Email: wpengine@zenogroup.com