

What Makes Generation C(ovid) Tick:

Characteristics That Drive
Gen C Consumers



Why Generation C(ovid) matters to brands and our world.

Those of us in the insights world have always been fascinated by generational research.

It has been invaluable in a variety of arenas to understand the optimism and drive of Baby Boomers, the independence and skepticism of Gen X and the team orientation and curiosity of Millennials. This perspective helps brands market more effectively. It motivates educational institutions to redesign curricula. It guides policy makers, as they tailor social programs to help organizations create work environments that are most conducive. And, it can even reveal what's behind voter preferences.

Although predicting the future is a huge challenge, we know that if we understand a generation, we can paint a picture of how it will behave and consume and shape our world.

Over the last several years, Gen Z has gotten our attention as a progressive, diverse, digital and entrepreneurial segment of our population. Older Gen Zers are already in the workforce and helping to redefine how, when and where we work.

This came to life for me when a friend told me about her son, a junior in high school, who recently said to her, "Mom, because of Covid, I am 17 years old, and I have never had a drink, smoked a cigarette, had a girlfriend or gone to a high-school dance." It was striking to ponder that.

Consider everything that mattered to you when you were a teenager: the need to be more independent, to rebel, to explore the world, to experiment and be adventurous, to focus more on friends, to party, to dream.

And then, imagine that right at that time in your life, you were required instead to stay home, wear a mask, attend school online and skip many of the experiences that shape the journey to adulthood.

The idea of trying to understand this cohort, separate from Gen Z, was irresistible. What we needed was in-depth research on the young people who stepped into their formative teenage years amid the tumult of the pandemic.

Our hypothesis was that Covid indelibly shaped and maybe even changed this group's worldview, values, habits and preferences. As a result, it was a separate segment from older Gen Zers.

We call them Generation C(ovid).

In thinking about how to conduct the research, it became clear that two research agencies could do the kind of deep dive this would require:

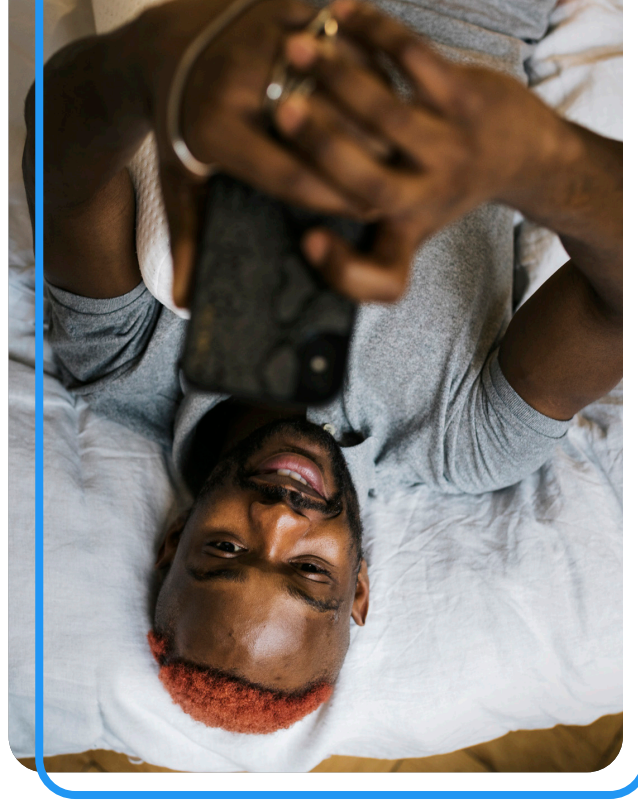
→ **Sago**, a leading global research partner, excels at the kind of qualitative and quantitative research that builds incredible trust with respondents.

→ **And C Space**, the pioneer of Online Communities, empowering customer-inspired solutions to deliver strategic impact and grow your business.

We are all lucky that the two firms agreed to collaborate.

This report delves into the depths of Gen C's psyche, exploring how the pandemic's shadow casted a lasting influence on people's life choices,





behaviors and aspirations.

Unlike any generation before, Gen C has been sculpted by a unique blend of global crises, technological advancements and societal shifts, all converging at a critical juncture in these individuals' developmental years.

Our analysis reveals that Gen C is not just an extension of Gen Z. While Gen Cers share the digital fluency and progressive values characteristic of late Gen Z, they have a distinct set of traits: heightened adaptability, resilience and a redefined understanding of work, education and social interaction.

Their consumption patterns, social engagement and career aspirations reflect a blend of pragmatism and innovation born from navigating a world where uncertainty is the only constant. And, although they have gone to fewer in-person parties, they demonstrate a striking level of maturity that comes from enduring difficult times at a young age.

We hope that you find this report illuminating and provocative, and that, as always, you will send us your feedback.

With gratitude to the teams,



Diane Hessian
Chairman, C Space
Board Director, Sago



Listening to 1,000 voices more closely.

To really understand Generation C, we needed to go deeper.

We approached the project from different angles to gain more perspective on what it means to be part of this group.

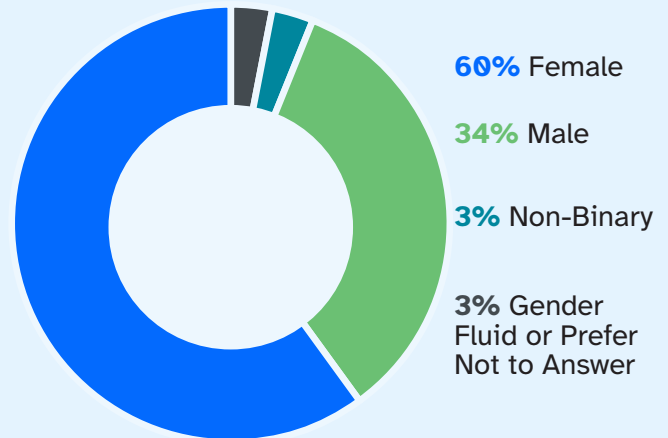
For our research, we reached out to people **all over the United States** to learn more about their experiences. During the initial stages of the pandemic, each state issued stay-at-home orders for 1–3 months, which shut down daily routines like going to school or work, playing sports, attending live events, going to friends' houses, shopping and more.

For most teens in the U.S., this period overlapped with **two years of school**. Families navigated each day as it came – with plans giving way to uncertainty.

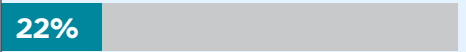
New realities included social distancing, increased hand cleaning, mask wearing, travel restrictions, contact tracing, disinfecting, vaccinating, quarantining and generally avoiding crowded places.

Ultimately, we **surveyed 1,170 teens** across the country – representative of region, household income levels, gender and race/ethnicity – and conducted **in-depth interviews with 32 teens and 12 parents**.

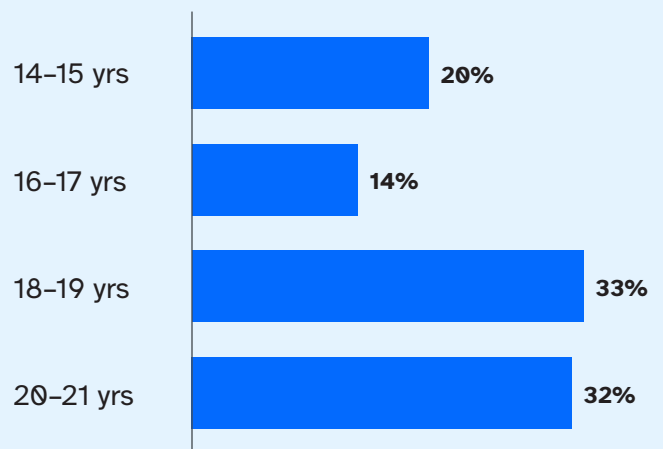
GENDER



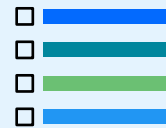
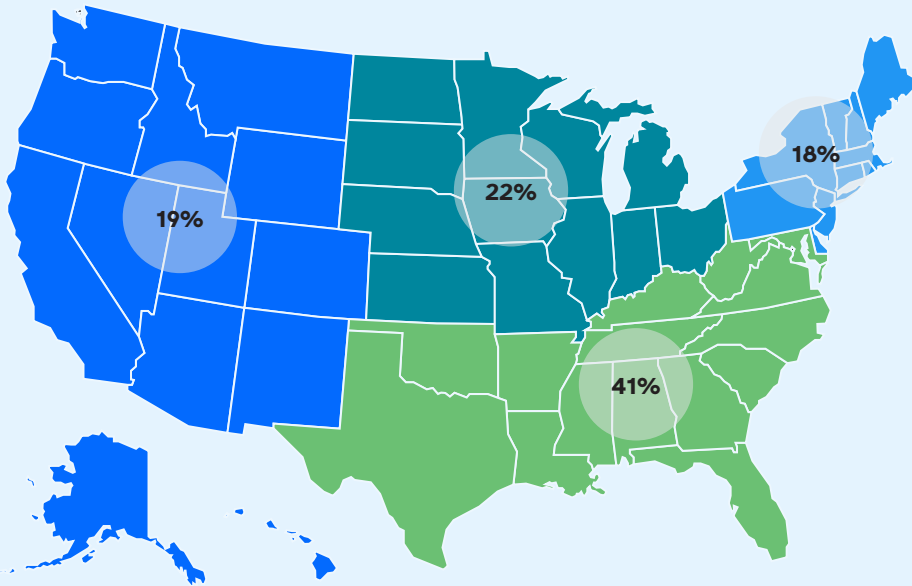
LGBTQIA+



AGE

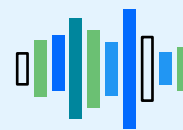
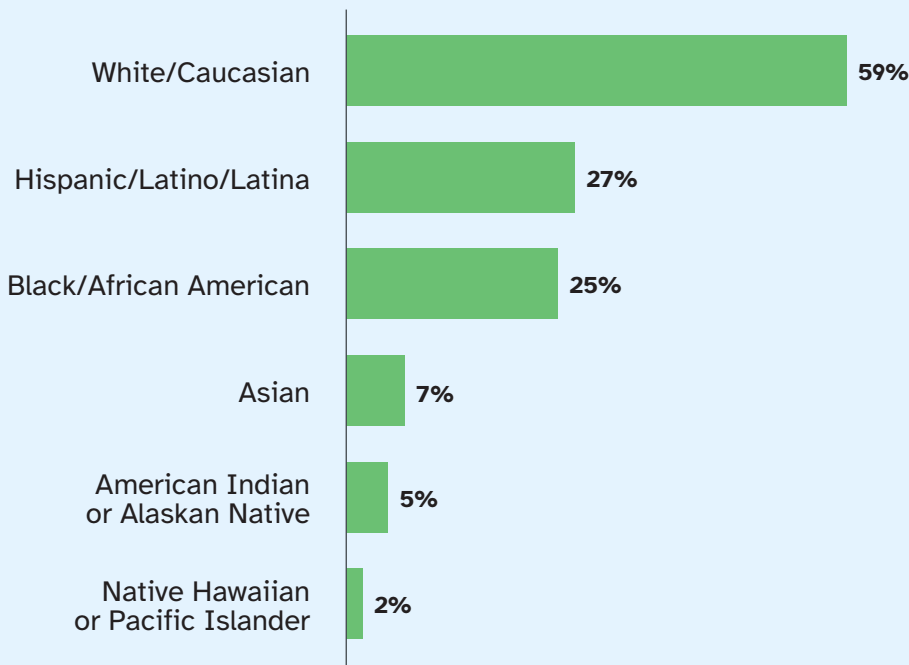


REGION



The 15-minute online quantitative study explored spending priorities, temperament and personality (especially in responding to stressors and change), impact of the pandemic, attitudes toward institutions, along with preferred modes of engagement, socialization, learning and leadership.

RACE/ETHNICITY



The 45-minute in-depth interviews dove into experiences, perceptions of belonging and wellbeing, education and career choices.



“

Different isn't bad. I think [the pandemic helped] people learn a lot about traditions and cultural norms that we'd been so set in and didn't need to be.”





TL;DR

The big takeaways.

Generation C values kindness and belonging, yet it does not see world leaders and big corporations reflecting that mindset.

The hard reset of lockdown gave Gen Cers the chance to focus on who and what matters most in their lives – and to realize what they missed. People emphasized the importance of authenticity, and they committed to cherishing each day.

While Covid is no longer directly shaping their daily routines, they are now living with more intention and resolve, knowing that everything can change instantly. The sudden upheaval of life across the globe shook teens to the core, yet it ultimately had a positive impact on their overall maturity and worldview.

Below are some of the characteristics driving Gen C according to our research:

1. Resilient.

2. Empathetic and just.

3. Fiscally responsible.

4. Genuine and true-self affirming.

The details tell us even more.

For this report, we are defining “Generation C” as children in the United States who were in middle or high school between the ages of 11 and 18 at the onset of Covid.

At the time of this report, they are between the ages of 14 and 21.

During the beginning of the pandemic, most Gen Cers still lived with a parent or guardian and relied on them for basic needs like food and shelter, along with higher-level essentials like safety, human contact and finding direction in their lives.

As Gen Cers continue to enter adulthood over the next several years, we believe the character traits and values they developed during the pandemic will impact their behavior as consumers.



Some Gen Cers had to persevere on their own.

It's important to acknowledge that not all Gen Cers were able to rely on parents or guardians for basic needs or psychological safety. Too many children in the United States live in abusive homes, are homeless or live in poverty. Even beyond these scenarios, some Gen Cers lost the safety they thought would never go away.

One Gen Cer shares:

“ [My family and I] had a lot of issues, especially because I was leaving the Mormon church at around that time, and I was trying to be like, ‘I don’t wanna do all this Mormon stuff, and I’m also gay.’ And, it was just, it was quite a lot. And so, I was going to therapy to be like, ‘OK, how do I set boundaries with my family? How do I do things like that? How do I spend time with them?’ Everything like that.

I have a nice house... like we had enough space to do what we wanted, like hot tub, theater room, everything... I kept entertained. But, at the same time, there was also a lot of constriction and [my parents] would search my phone all the time and just take issue with anything I said. And, just a lot of things that I look back and I’m like, that was very, like, shitty to do. And so, it was always sort of like an uneasy piece I would say. Whenever I was at home... I had a lot of anxiety, especially being at home all the time, and the only way I can interact with people is digitally, and then, all of those [channels] are being monitored constantly. So, I was very restricted in what I could do and say.

But coming home from college, I kind of felt like my life ended a little bit, and it was just kind of rough [because] Mormonism isn’t kind to people who leave and so kind of existing in that Mormon house as to when I was at school, when I didn’t have to exist around Mormonism at all. And being in that much more positive place, I know. And so, when I would go to the sex positive club at school or I would hang out with friends, and you can actually curse [because] I’m not in my Mormon house, or I would be doing creative stuff... That makes me happy.

This generational trauma ends with me, as does the bloodline.”

For Gen Cers, the implications in this report become greater through the rapid emotional growth they experienced in the pandemic, along with their search for safety outside the traditional family structure. That remains the case for much of Gen C today. But, some have entered the workforce and no longer rely on parents or guardians for basic needs.

1

Gen C is resilient.

As Gen Cers prepare to navigate adulthood, one thing we know for sure is that they feel they can take on anything. With all the change that took place between 2020 and 2022, this generation adapted in real time. Youth learned that nothing is guaranteed. Anything can happen unexpectedly.

In fact, one person shared with us, “I think the biggest lesson I learned from Covid was that life is gonna just kind of smack you in the face sometimes, and you gotta learn how to just deal with it and adapt to it.”

Unlike many adults who repeatedly asked about getting back to normal, Gen Cers took each day at face value, focusing on the present instead of the past or future. They believe they were required to demonstrate acceptance, adaptability, maturity and emotional resilience.

Many discovered silver linings during lockdown (slowing down, identifying values, navigating their own way through an unprecedented time and learning how to ask for help to name just a few).

This is the type of resilience we see from people experiencing an ongoing trauma, so it is not surprising. Yet, knowing that trauma typically leads to deeply entrenched attitudes and behaviors, it is a characteristic of this sub-generation that will have a lasting impact on those they interact with.





84%

of Gen C reported pandemic-related stress. 67% reported moderate stress and 17% reported high stress since the start of the pandemic.

Why resilience matters to Gen C.

The APA Dictionary of Psychology defines resilience as “the process and outcome of successfully adapting to difficult or challenging life experiences, especially through mental, emotional and behavioral flexibility and adjustment to external and internal demands.”

Among the factors that contribute to someone’s ability to adapt to adversity are the ways in which they view and engage with the world, the availability and quality of social resources and specific coping strategies. While teenagers have always had to deal with challenging circumstances in their young lives, Gen Cers had to adapt in

a pandemic, setting them apart from their counterparts. This has led to a collective shift in how Gen C engages the world, along with a swell in the availability of resources focused on addressing the group’s needs.

Yet, access to these resources is not equal across lines of class and privilege. Despite this, the collective focus on the welfare of young people feeling the impact of the pandemic has resulted in a broader adoption of effective coping strategies. We don’t know, however, which of these will have the most lasting effect.



74%+

of Gen C value benevolence, universalism, self-direction and achievement.

“

I wasn't used to spending a bunch of time with my family (before Covid), so when you're now forced to spend a whole 24 hours in the same place as them, it's so much different.”



2

Gen C is empathetic and just.

Being a child during a global pandemic opens your eyes to the unmet needs of others. Since parents and guardians were mostly taking care of Gen Cers' needs, they were able to look outside of themselves and see fellow classmates, neighbors and global citizens suffering.

During a life stage when kids are typically self-absorbed, Gen Cers were removed from their school environment, peers and status quo long enough to see other people's problems and situate their own challenges within a wider context.

As a result of this time of both self-reflection and empathic listening, 74 percent or more of Gen C members value benevolence, universalism, self-direction and achievement.

Gen C was stuck in the house and reluctant to spend that time with parents. Unlike many in this life stage who complain but don't enact change, many teens made attempts to separate themselves from the rest of their home.

Siblings and parents saw more of each other, but this only encouraged Gen C to carve out its own space while parents/guardians struggled with their own adjustments to the "new normal."

The broader implication of these micro shifts is a new family dynamic. Lockdowns specifically brought this out, reshaping "family time," "quality time" and interpersonal relationships within the household.

At the same time, Gen C was critically observing people in leadership or decision-making positions and used these observations to decide who they would become. They do not want to be unjust leaders or participate in exploitative systems. Like all of Gen Z, Gen C finds disgust in decisions that don't account for the needs of all constituents.

Unlike older members of Gen Z, Gen Cers still believe they can influence unjust environments and systems rather than simply opting out of them. Some may call that naive, but hope is a survival mechanism, too, and Gen C has survived a lot. "If there's an exam that was really difficult and everybody sort of did poorly, there's more of a public outcry... like some kind of injustice if the professor isn't lenient."

3

Gen C is fiscally responsible.

While older Gen Cers continued to engage in risky behaviors typical of teenagers, they also developed discipline in one specific part of their life: finances.

Of course, this is easier to do when adults cover major bills, but the principles of financial discipline and conservatism remain, three years after the height of the pandemic.

Gen Cers who were 18–21 in 2023 are more than twice as likely to be savers than spenders, which is quite contrary to the rest of Gen Z. In fact, older Gen Cers are likely to have a strict budget. When they do spend money, it is more likely to be on experiences rather than products.

But, experiences are not absent of products. The products play a secondary role. Many experiences require the acquisition of material things, such as musical instruments, art and textile crafting supplies, food ingredients and gaming gear.

Having witnessed how Covid financially impacted their family, friends and the world around them, Gen Cers place a greater importance on saving in comparison to the rest of Gen Z.

They are willing to spend – but only when they believe that spending aligns with their values and larger goals.

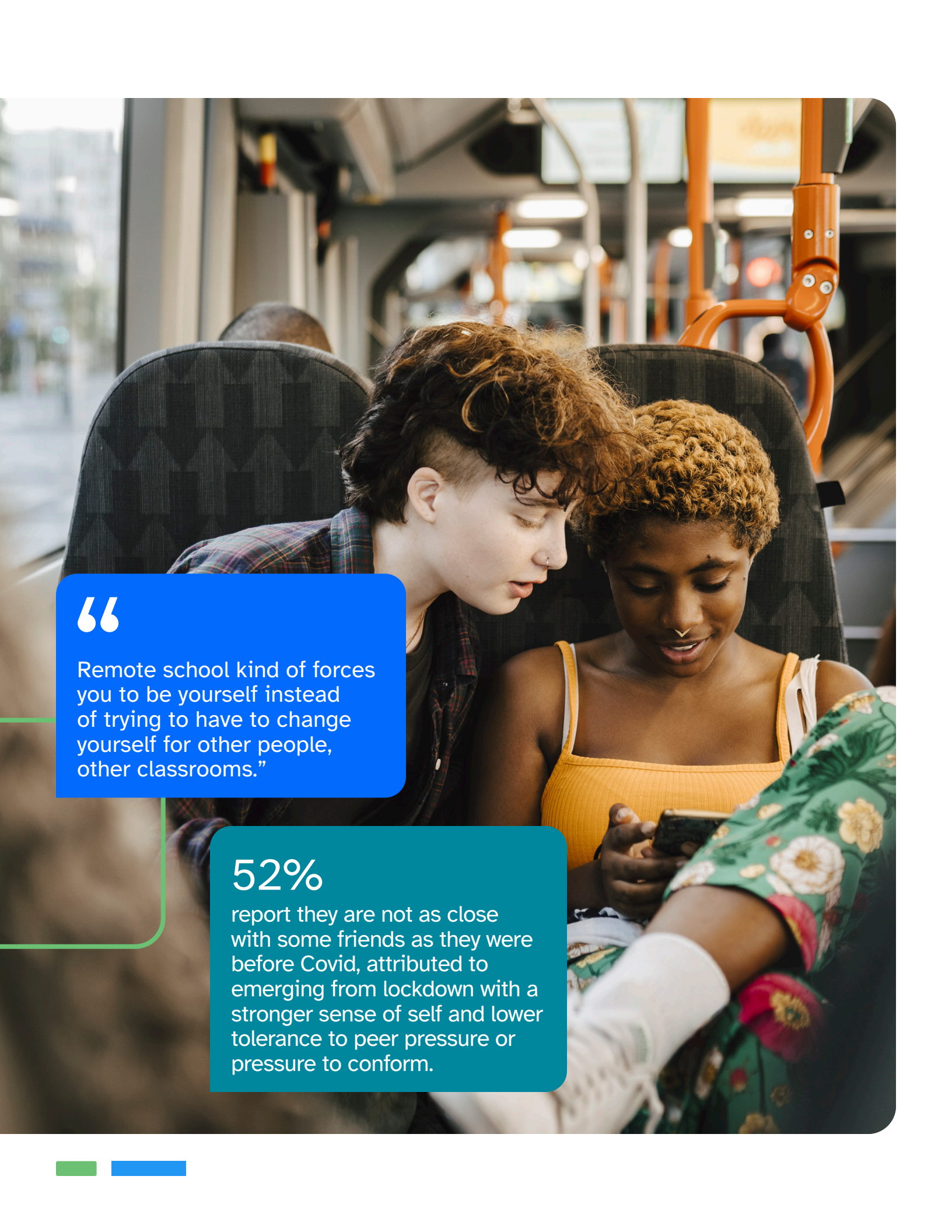
Ages 14–17 are balanced between saving and spending.



Ages 18–21 are more than twice as likely to be savers than spenders.







“

Remote school kind of forces you to be yourself instead of trying to have to change yourself for other people, other classrooms.”

52%

report they are not as close with some friends as they were before Covid, attributed to emerging from lockdown with a stronger sense of self and lower tolerance to peer pressure or pressure to conform.



4

Gen C is genuine, unapologetic and true-self affirming.

Gen Cers feel comfortable in their own skin, partially due to the pandemic, and they recognize how authenticity is critical to their own identity and experience, along with the experiences of others.

With schools closed and weekly routines destroyed, people redirected the energy that would have gone toward gaining popularity and conforming. To ward off loneliness and despair, they needed to discover new interests and abilities.

For some, this downtime pointed out underlying anxiety. Seeking mental health support is a norm in this group, though, with little if any social stigma. An increased dialogue exists about setting and keeping boundaries, establishing work/life balance and regulating emotions. In fact, Gen Cers see being true to themselves as a potential antidote to anxiety.

Life is too short to hide who they really are.

Members of Gen C were also able to curate a life and schedule that let them be productive and focus on self-care. They developed better routines that fit with the lifestyle they wanted to maintain – instead of letting their teachers, parents or coaches do it for them.

With fewer outside pressures and the ability to control what they consume online, this group is now very active and intentional about what influences them.

Because of their focus both inward and outward, Gen Cers don't see a benefit to meanness nor division. As one 17-year-old put it, "You can't hate people just because they are different." Some cited the social tension over vaccines as a real-world example of having to work through differences without destroying relationships. They intentionally "do the work" to find groups – something they learned to do when pre-Covid cliques disbanded or shifted.

Friendship, honesty and enjoying life are all values important to Gen C. It's not just the typical pattern of emotional maturity at this stage of life. Covid-era kids, already hungry for human interaction, emerged from lockdown with newfound energy for real friendships that don't rely on popularity or posturing.

And in cases where family hasn't been a source of unconditional acceptance, belonging to a tribe or "chosen family" is vital. In fact, today's friendships are stronger and have deeper interactions than those before or during Covid.

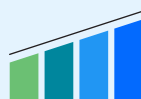
How brands can connect with Gen C — and grow.

As Gen Cers continue to enter adulthood over the next seven years, brands should not assume they'll follow the stereotype of young adults spending frivolously.

Gen C values transparency and authenticity, so brands should, too. These individuals appreciate when brands tell them hard truths, helping them discern fact from fallacy. So, honesty leads to respect. Remember, Gen Cers are comfortable with the idea of not blending in, and organizations that understand this will likely do a better job of building and sustaining more lasting relationships with them.

As employers, brands should provide channels for associates to have respectful discourse about all topics in a way that lets them be who they are. And, companies should reconsider traditional educational requirements, as many Gen Cers educate themselves through more affordable means or in ways that give them flexibility with their time. They don't believe in just going along with the status quo because the status quo has failed them before.

Brands that choose to ignore the implications of Gen C becoming adults should prepare for disruption. We predict the following impacts for the education, wellness, fashion, tech and media industries:



Driving the learning revolution.

Gen C's pandemic-forged perspective on education demands flexibility, innovation and a digital-first approach. Traditional methods won't cut it anymore. Virtual classrooms, interactive online courses and state-of-the-art educational tools are not only a reality. They're a necessity. Gen C expects a return on their financial investment throughout their educational journey — and after they graduate.



Making tech more human.

The future belongs to brands that build genuine connections without exploiting relationships. Gen C naturally treats AI as a team member and not as a surrogate for human expertise. Tech platforms should stimulate in-person gatherings, wholesome dialogues and the exchange of expertise so that all participants evolve and engage as the best version of themselves. This is about creating personal, community-driven platforms that resonate with a generation all about authentic interaction.





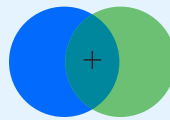
Prioritizing their total wellness.

Gen Cers embrace teletherapy, mental health apps and wellness services unlike other generations. Their openness about mental health is a transformative movement for not just their group – but for everyone. Gen C believes mental wellness is part of total wellness, and resources that reflect this philosophy will have a greater impact with this group. Opportunities abound for both existing and new brands to engage Gen C in the development of these elements.



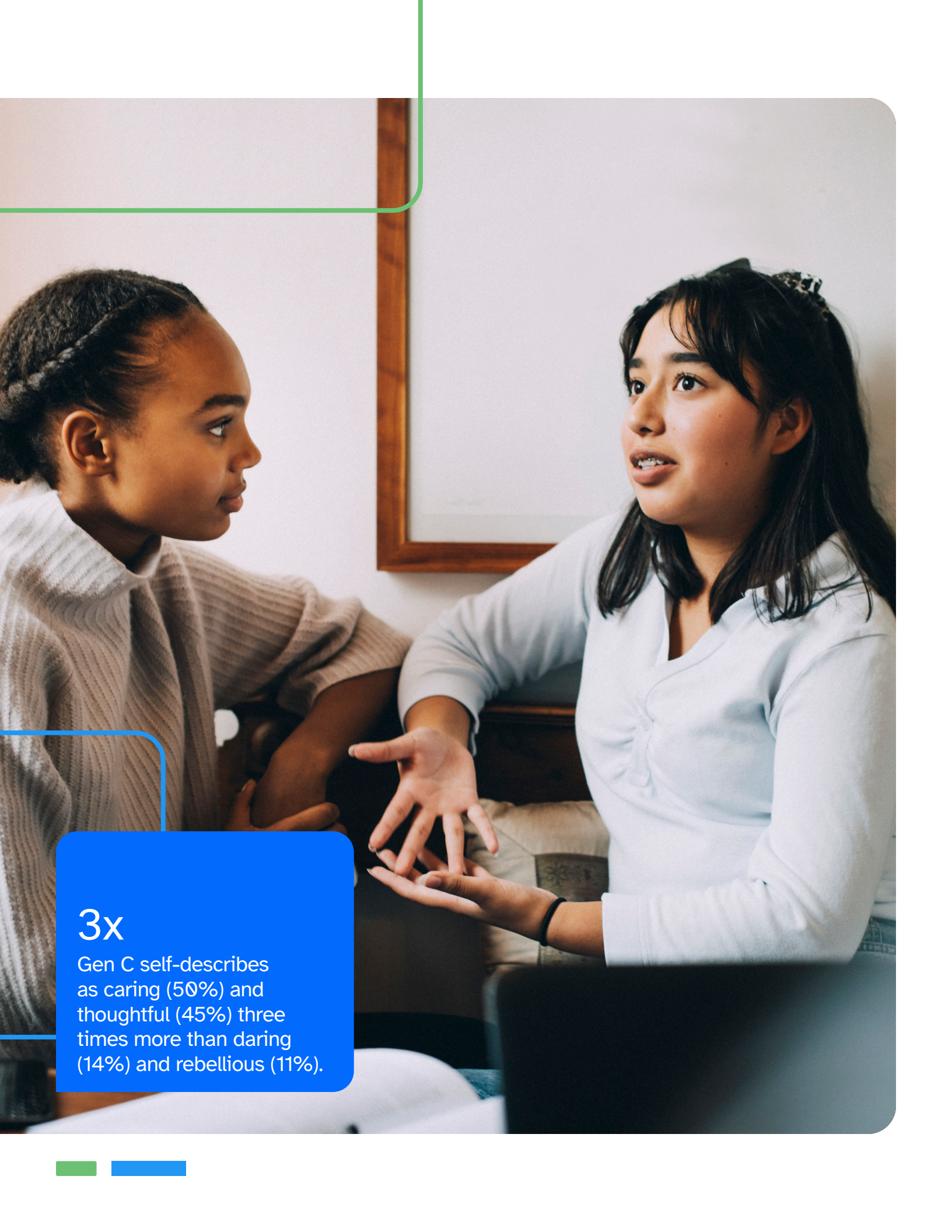
Demanding new media narratives.

Gen C's hunger for representative content is driving entertainment and media toward a seismic shift. This is a generation that understands how hurtful common stereotypes are to people they love. Consequently, Gen Cers want to see their entertainment reflecting the diversity they experience every day. Their preferences will shape the future of films, television and music.



Redefining authenticity.

Generation C challenges convention through self-expression. Fashion brands can no longer bank on their legacies to dictate trends and expect these individuals to follow. And, these houses can't continue to spend lavishly without concern for waste. In an era of rapid change, they must provide an inclusive platform for sustainability (both financially and environmentally) while amplifying personal expression. For brands, ethical practices and personalized experiences aren't optional. They're the keys to winning over this influential group.



3x

Gen C self-describes as caring (50%) and thoughtful (45%) three times more than daring (14%) and rebellious (11%).



From understanding to evolution.

We live in a society of rapid change that doesn't show any signs of slowing down. It's important to continue watching Generation C, as it moves into other stages of adulthood.

Our biggest question: Will Gen C become even more resilient in the future?

As Gen Cers raise children of their own, brands may need to prepare for an emotional maturity and heightened self-awareness that transforms mindless consumption into thoughtful partnership.

This generation will join the traditional workforce with values we often seek in our most respected leaders (authenticity, empathy, strategic budgeting and self-awareness). So, we must consider the implications.



What will happen to existing leadership positions?

How will Gen C react to people who do not share its values?

Will organizations adjust and promote younger Gen Cers to lead?

Brands and organizations must be agile in their response to the observations and requirements of Gen C, or its members will likely create brands of their own to disrupt and dominate industries.

For brands to meet Gen C's demands, they'll need to accept doing it digitally and likely in a channel they won't fully control (think social media).



What might happen if a brand embraces this shift in control?

How might relationships evolve among consumers and brands?

Even more so, how might relationships across traditional demographic groups become better or worse?

Gen Cers are breaking out of boxes centered on their race, ethnicity, gender identity, sexual orientation, language spoken, income level, educational attainment and disability status.



As Gen C grows older, will it continue to reshape the status quo?

What might this mean for marketing campaigns and product launches that once relied on the demographic binaries previous generations accepted?

Perhaps Gen C will force brands to replace demographics with psychographics as a strategy for segmenting their consumers.

Furthermore, we wonder how far Gen Cers will push brands into engaging one individual across many segments or "selves."

The ultimatum to advance.

While Gen Z and Gen C share traits like digital fluency and progressive values, Generation C's unique experiences during the pandemic have cultivated resilience, adaptability and a pragmatic approach to life's challenges. As one Gen Cer put it:

"When Covid was happening, [it] was also the time where I was suddenly starting to think, 'What am I gonna do with the rest of my life?'"

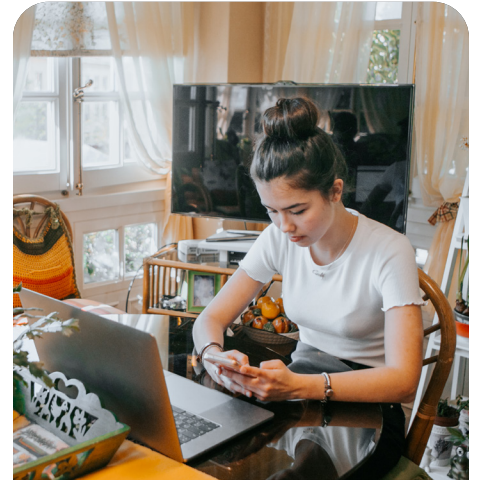
By concentrating on these five areas, brands can effectively reach Generation C, acknowledging their unique experiences and values forged in the global pandemic. The companies that fail to embrace these changes risk losing relevance with one of the most influential groups of people today.

The choice to build meaningful and lasting relationships with Gen C is theirs to make.



Embodying resilience.

Gen C's formative years during the pandemic have instilled a strong sense of adaptability and resilience. Brands should mirror this in their messaging and products. Campaigns that highlight overcoming challenges, flexibility in the face of change and the ability to adapt to various situations will resonate deeply with this group.



Rebalancing work and life.

Gen C's understanding of work and education has evolved significantly, and brands should embrace the generation's perspectives. Offering flexible hybrid solutions, supporting remote learning and working tools, along with providing products or services that facilitate a balance between work, education and personal life, will help brands maintain their relevance with this group.





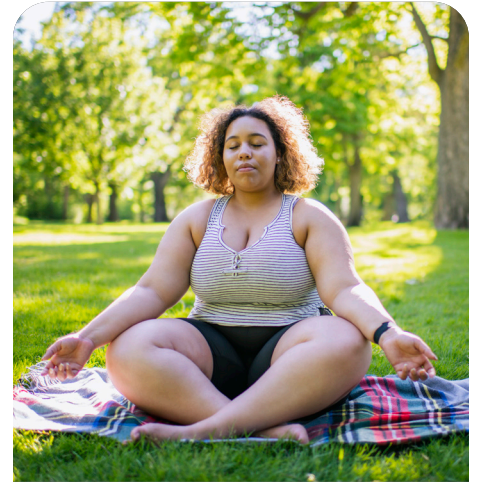
Connecting across touchpoints.

For Gen C, online and offline touchpoints blur and intersect with one another to create unique engagements and narratives. Brands can lean into this with multimodal storytelling that involves cutting-edge technologies like AR/VR, creating engaging online experiences and utilizing experiential installations to interact with this audience. Brands should also recognize the importance of online communities where Gen C spends time.



Resonating through the real.

Authenticity is crucial for Gen C. Brands need to be transparent and genuine in their communication. This involves honesty in marketing, showcasing real-life stories and avoiding over-exaggerated claims. Authenticity in brand narratives and values, especially around social and environmental issues, will foster trust with Gen C.



Embracing total wellness.

Gen C, having experienced the pandemic during critical developmental years, places a high value on mental health and personal growth. To support this, brands can promote wellness, offering resources or products that aid in mental health and align with initiatives that encourage personal development and self-care.

Methodology



Phase 1: Quantitative Research Survey

National survey with **1,170 completed results** from youth ages 14–21 to explore and define key characteristics of the U.S. population who entered and approached adulthood during the Covid pandemic, particularly in and through their decisions and attitudes as consumers, learners and leaders.

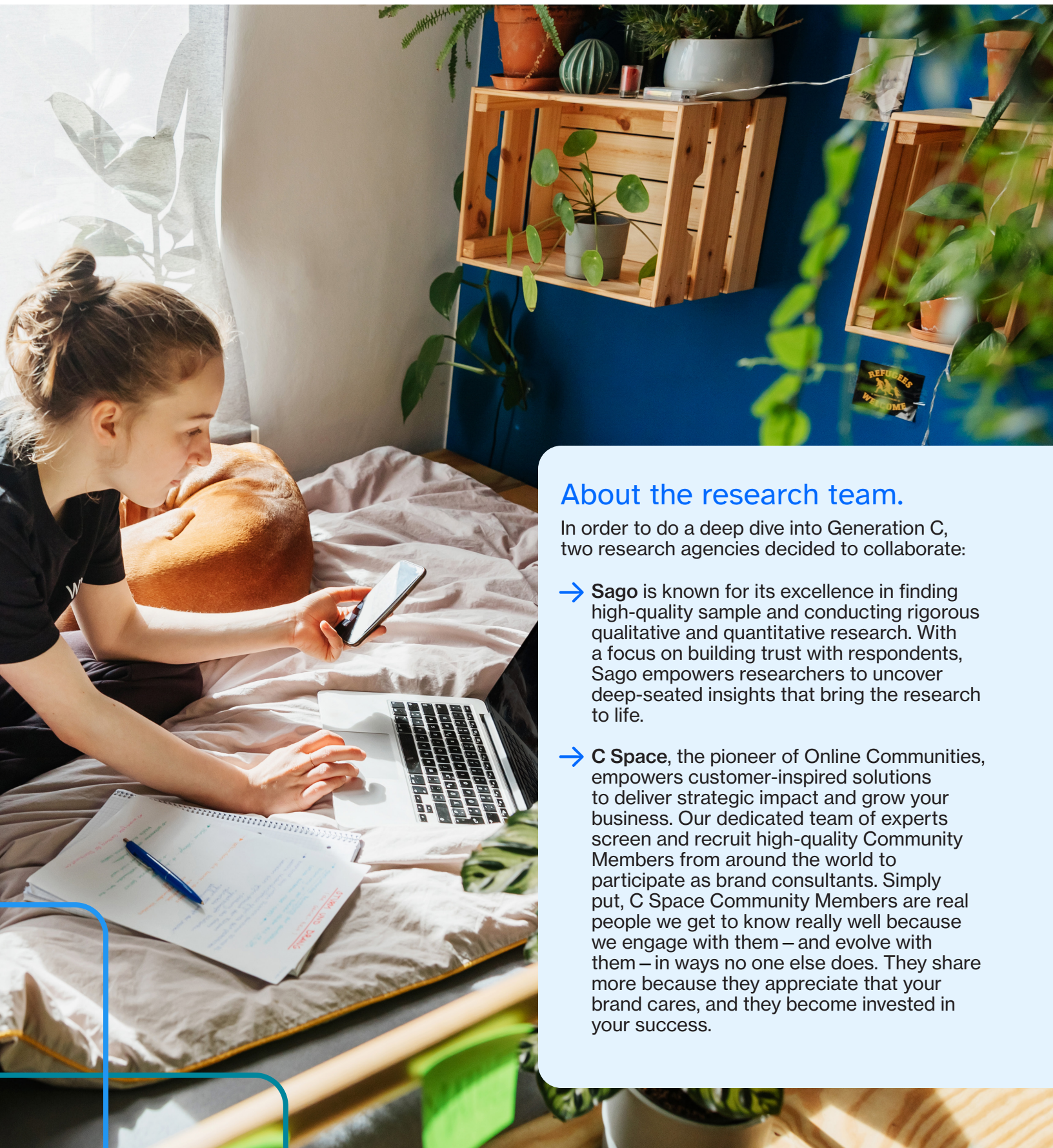
- Current sentiment and spending priorities.
- Temperament and personality factors in responding to stressors and change, navigating ambiguity and embracing responsibility as an adult.
- Impact of pandemic and family dynamics on optimism/pessimism toward personal goals and ideals.
- Attitudes, intentions, determinants of value with institutions: academic, financial, health, political, social.
- Preferred modes of engagement, socialization, learning, leadership now versus pre-pandemic.



Phase 2: Qualitative Online Interviews

In-depth online interviews with **32 youth respondents** (16 participants ages 14–17 and 16 participants ages 18–21) and **12 parents of participants** ages 14–17 to deeply explore experiences, perceptions of belonging and wellbeing, education and career choices.





About the research team.

In order to do a deep dive into Generation C, two research agencies decided to collaborate:

- **Sago** is known for its excellence in finding high-quality sample and conducting rigorous qualitative and quantitative research. With a focus on building trust with respondents, Sago empowers researchers to uncover deep-seated insights that bring the research to life.
- **C Space**, the pioneer of Online Communities, empowers customer-inspired solutions to deliver strategic impact and grow your business. Our dedicated team of experts screen and recruit high-quality Community Members from around the world to participate as brand consultants. Simply put, C Space Community Members are real people we get to know really well because we engage with them – and evolve with them – in ways no one else does. They share more because they appreciate that your brand cares, and they become invested in your success.



Sago is a leading global research partner that puts the human voice at the center of everything we do. By providing unparalleled access to audiences, comprehensive solutions, and market research expertise, we help clients connect human answers to pressing business questions. Leaning into our nearly 60-year legacy of impact and standing behind our dedicated team of experts, we help clients gain a deeper understanding of what their customers truly want and demand, empowering them to make informed decisions with unwavering confidence. At the heart of Sago is a commitment to improving the human experience in research, relentless innovation, and changing the world through our work. Sago is your trusted partner on the journey to customer-centric excellence.

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