

A photograph of four young women of diverse backgrounds laughing and hugging each other outdoors. They are standing in front of a blurred background of dry vegetation and a bright, hazy sky, suggesting a sunset or sunrise. The woman on the far left is wearing a pink tank top and black shorts. The woman next to her is wearing a grey t-shirt. The woman next to her is wearing a white t-shirt with a pattern. The woman on the far right is wearing a teal t-shirt. A large, semi-transparent dark brown banner is overlaid across the middle of the image, containing the text 'Understanding Gen Z' in white. The word 'Gen' is in a smaller font size than 'Z', which is very large and extends across the banner.

# Understanding Gen Z



# Gen Z

## By the Numbers



- Born after 1995
- 68 million Americans (about 25.9%)
- The most racially diverse generation ever
  - 25% Hispanic American
  - 14% African American
  - 6% Asian American
- Will account for 40% of all consumers by 2020, with \$45 billion in buying power

*Source: The U.S. Census Bureau*

# Gen Z Attitudes

	Before Gen Z	Within Gen Z
Internet access	A privilege	A human right
Influence	Purchased	Earned
IP and patents	Value creators	Barriers
Failure	Avoided	Embraced
Gaming	Pure play	A foundation for engagement
Uncertainty	Prepared for	Predicted
Retirement	A destination	A journey
Connectivity	A luxury	A necessity

Source: *The Gen Z Effect*



# Gen Z Compared to Millennials

## Millennials

vs.

## Gen Z

Tech savvy: 2 screens



Tech innate: 5 screens

Communicate with brevity



Communicate with imagery and abbreviated social lingo

Curators and sharers



Creators and collaborators

Now-focused



Future-focused

Optimists and idealists



Realists

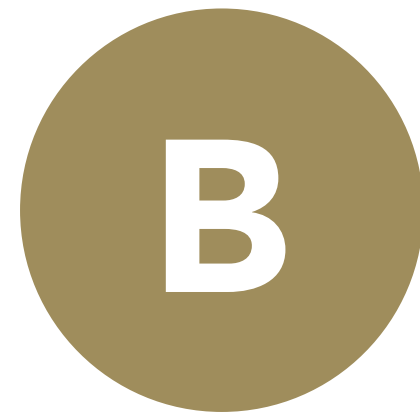
Want to be discovered



Want to work for success



# A Generational Overview



**Baby Boomer**



**Gen X**



**Gen Y (Millennial)**



**Gen Z**

## Context

- Postwar
- Dictatorship and repression in Brazil

- Political transition
- Capitalism and meritocracy dominate

- Globalization
- Economic stability
- Emergence of internet

- Mobility and multiple realities
- Social networks
- Digital natives

## Behavior

- Idealism
- Revolutionary
- Collectivist

- Materialistic
- Competitive
- Individualistic

- Globalist
- Questioning
- Oriented to self

- Undefined ID
- "Communaholic"
- "Dialoguer"
- Realistic

## Consumption

- Ideology
- Vinyl and movies

- Status
- Brands and cars
- Luxury articles

- Experience
- Festivals and travel
- Flagships

- Uniqueness
- Unlimited
- Ethical

**Source:** McKinsey&Company



2

# Gen Z Insights



# Teenagers are intimidating.

And we are in the business of getting 16-year-olds to make a quarter-million-dollar decision.





**We are  
changing  
the world.**

We believe it's up to us.

**Values/Religion/Politics/Culture/  
Relationships/Technology/Health/  
Money/Education/Careers**





Values

**“I probably care too much,  
but so should you.”**





We have a socially conscious value system, defying and resenting conventional labels that don't fully capture who we are. We're concerned, aware, informed, and ready to engage in meaningful conversations about the issues we care about. There's no "one size fits all" in our world. Because we don't just accept differences in others —

**we celebrate them.**

**60% consider themselves to be socially conscious**

**67% said being true to their values and beliefs makes a person cool**

**56% are concerned about racism and sexism**

**76% are concerned about humanity's impact on the planet**





Religion

**“The term religion is outdated.  
It’s more about spirituality.”**



## Religion

While organized religion has been a huge part of past generations, it falls farther down on our list. We don't want to be confined by formalities and rules; we're more interested in spirituality in a broader sense. And mostly we agree that a person's religious views are an individual thing—

**no one religion is right or wrong.**

**17% identify as Catholic**

**Only 28% say they attend services once a week**

**79% of non-religious teens believe Christianity is anti-gay**

**13% of teenagers identify as atheist**



**“We’re going to use our voices  
to help change the future in a  
positive way.”**





We've lost our trust in institutions like education, media, and the government. We've grown up through a technological revolution, a recession, a war on terror, the legalization of gay marriage, the first black president, the #MeToo movement, countless school shootings—and we're only teenagers. We believe our voices can and should be heard. We're done hearing all the talking—

**we're ready to take action.**

**82% say their primary fear is the rise of terrorism and extremism**

**84% of Gen Z identify as fiscally moderate or conservative**

**40% say they think the world is becoming a worse place**

**50% don't trust Facebook with their personal data**



Culture



**"We love a good adventure  
(and we'll definitely document  
our entire trip on social media)."**



It's no surprise that technology is an important part of our culture. Having 24/7 access to information and greater diversity around us has expanded our worldview. It's why we like to travel and experience cultures other than our own. And it's no surprise how much social media influences everything we do, see, listen to, and interact with—

**when it comes to culture, we immerse ourselves.**

**94% cite music as “important” to their lives**

**They average 29 travel days per year**

**83% would travel anywhere that allows them to be active**

**77% prefer printed books over digital ones**



A group of four young adults (two men and two women) are gathered around a campfire at sunset. They are all smiling and looking down at the marshmallows they are roasting on sticks over the fire. The scene is warm and intimate, with the orange glow of the fire and the setting sun. The background is a soft, hazy sky. The overall mood is one of friendship and shared experience.

Relationships

**“Nice to finally meet you, I think we follow each other on Instagram.”**



## Relationships

As the idea of a “traditional” family structure becomes obsolete, technology is changing the way we interact. Relationships are different now. Our families are more diverse—we have single parents and multiple generations in our homes. We’re also closer with our parents and feel comfortable talking to them. Sometimes we even consider them our best friends—

**but a good friend can now be someone we’ve only met online.**

**58% of teens say parents are their best friends**

**33% live in a single-parent household**

**77% say they have an online friend they’ve never met in person**

**49% feel more comfortable socializing online vs. offline**



A woman with curly hair, wearing a white patterned blouse and a long beaded necklace, is looking at a tablet. A man with a beard, wearing a white shirt, is holding a smartphone and looking at the screen. They are sitting at a wooden table with a glass of iced coffee and a cup of coffee. The background is blurred, showing an outdoor setting.

Technology

**“Our generation knew how to search for something online before we knew the capitals of the 50 states.”**



With constant access to our phones, laptops, TVs, and gaming consoles, we're always connected. The internet and social media are part of the fabric of who we are. It's where we brand ourselves, share what we're passionate about, talk with friends, and interact with content. When it comes to entertainment, we consume —

**what we want, when we want it.**

**90% play video games of some kind (computer, game console, cell phone)**

**70% prefer streaming over television**

**91% of teens go to bed with their devices**

**40% say that working Wi-Fi is more important than working bathrooms**



A high-angle, top-down photograph of two young women lying on their backs on a cobblestone path. They are both laughing heartily, with their heads tilted back and eyes closed. The woman on the left is wearing a red long-sleeved shirt, and the woman on the right is wearing a grey long-sleeved shirt. They are holding a pink smartphone together above their heads. The path is made of grey and white cobblestones, and the background is slightly blurred.

Health

**“There’s no point in walking if something’s not counting my steps.”**



The stigma around mental health is disappearing, but we don't really have a choice. With unprecedented suicide and depression rates, we're increasingly aware of our mental health, more open to talking about it, and always trying to improve it. It's made us more health conscious, and more risk averse. We're obsessed with apps that help us meditate, reflect, work out, and keep track of our diet—

**we want to feel better physically and emotionally.**

**94% use health and lifestyle habits to improve their mental state**

**87% of 10- to 18-year-olds have witnessed online bullying**

**68% say that a well-balanced diet is critical**

**40% of Gen Z high school seniors had never tried alcohol**



A young Black woman with braided hair, wearing a black lace top, is pointing at a laptop screen. A young Black man with glasses, wearing a blue shirt, is looking at the screen with his hand on his chin. They are in a computer lab or office setting with other desks and people in the background. A semi-transparent dark grey box with white text is overlaid on the bottom half of the image.

Money

**“It’s all about my side hustle,  
because college is expensive.”**



Growing up through a recession has shaped our relationship with money. We're more financially aware and more budget savvy. If something seems overpriced, we won't buy it. And because there are so many options, we're extremely careful where we spend our money. We like brands that share the same values as us—

**to us, money equals freedom.**

**When asked, "What is the most important thing to you about a company?" 20% say what they sell; 80% say who they are**

**Only 10% say celebrities influence what they buy**

**40% say they plan to work and earn money during college**





Education

**“I know a degree is important.  
But I feel like my education comes  
from real-world experiences.”**



We recognize that a college education is important, but we want a global education. Our learning isn't confined to school buildings and campuses. We want to direct our own educational experiences, because that's valuable to us. If we aren't learning real-world skills that will help us in our professions, what's the point? —

**we want a college that recognizes who we are.**

**67% indicate their top concern is being able to afford college**

**63% want colleges to offer courses in starting a business**

**78% say getting a four-year degree may no longer make sense**

**75% say there are other ways to obtain education besides college**



**“My résumé?  
I’ll just send you to my website.”**



Even though we're career-oriented, we know how expensive college is. If getting a degree doesn't make financial sense to us, we'll get a job that doesn't require one. We're very realistic when it comes to working hard for our success. We're young, but we're already fiercely entrepreneurial, independent, and future focused—

**we may even own a business already.**

**70% of teens are working steady entrepreneurial jobs**

**55% more likely to want to start a business than Millennials**

**28% said that finding their dream job is their greatest aspiration**

**31% said being financially stable is their main goal**



3

# Connecting with Gen Z



A person's silhouette is centered in the background, with an orange circle containing the number 1 positioned on their head.

1

# Feed our curiosity.

We've never known a world without devices.  
We learn through bite-size content, 24/7.



A photograph of four people sitting on a grassy hillside, looking out over a valley. The image is overlaid with a semi-transparent orange filter. The people are seen from behind, looking towards the horizon. The text is overlaid on the image.

2

# Keep it simple.

We are drawn to well-designed experiences  
and appreciate the effort to understand  
who we are and what we want.



3

# Be real.

We are über-aware of fake news and marketing jargon.  
We value connections because they're more authentic and can provide a lasting benefit.



A background image showing two women in a celebratory mood. One woman, wearing a colorful patterned shirt, is leaning over a table and placing a candle on a chocolate cake. The other woman, wearing a blue baseball cap and a patterned shirt, is smiling and looking at the cake. The scene is set indoors, likely at a birthday party, with other people and decorations visible in the background.

4

# Meet us where we are.

We're not a one-size-fits-all generation. Personalize your approach and let us be in control.





5

# Tell us what you stand for.

We want to be part of something bigger than ourselves, and we want our schools to take a stand, too. Convey your culture.





6

# Invite us in.

We have a short attention span (8 seconds), so we evaluate things quickly. Communicate a guiding principle that's singular and intentional.