Conversations That Matter:

KEPINGIT REAL WITH GENZ

The first generation of true social natives.

Welcome



Dayoán Daumont
Consulting Partner, EMEA
Ogilvy Consulting



Awie Erasmus
Regional Planning Director,
Ogilvy Social.Lab Brussels



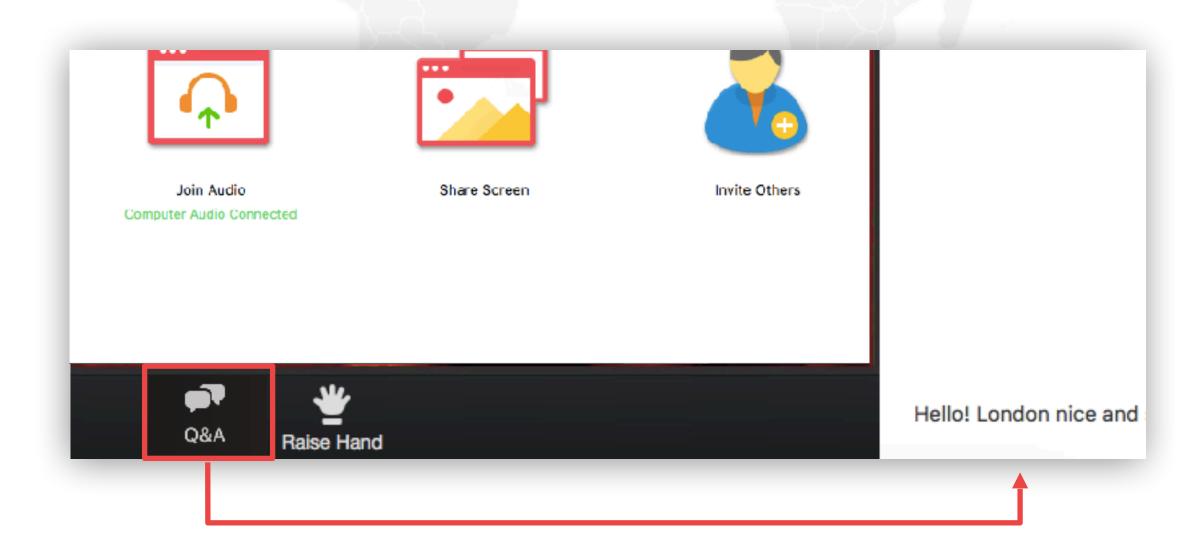
Nurya Doorenbos

Jr. Strategic Planner,

Ogilvy Social.Lab Brussels

Tell us where you are dialing in from!

What's the weather like in your city?



Do you want this deck?

Global Ogilvy Website

https://www.ogilvy.com/ideas

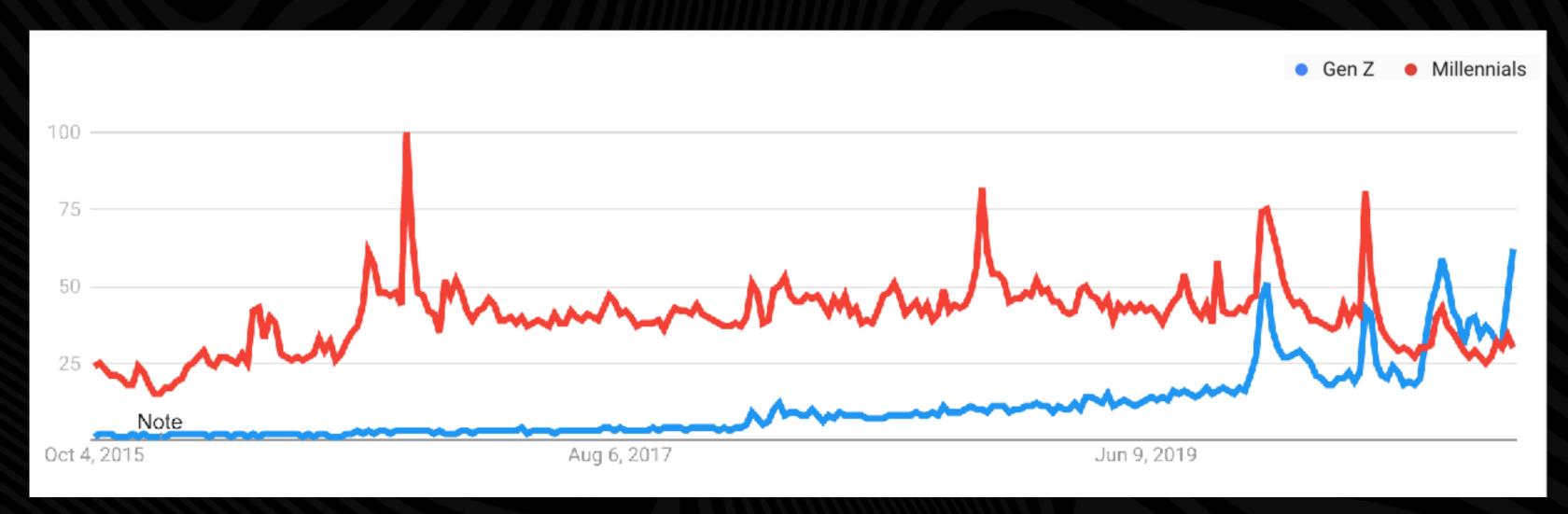




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GENZIS COMINGOUT OF THE MILLENNIAL SHADOW



Google Trends Search, Worldwide (4/10/2015 - 26/09/2020)

Who are Generation Z? The latest data on today's teens

The New York Times

Generation Z: Who They Are, in Their Own Words

Topshop Topman and Virtue launch 'Date Dash' mini-series for Gen Z shoppers



ENGAGING GEN Z: THE MARKETING PLAYBOOK

die met hun smartphone het politieke systeem op zijn grondvesten doen daveren

SPECIAL REPORTS

GEN Z STUDY: WHAT BRANDS NEED TO KNOW

Doritos removes the name from its logo to appeal to Gen Z in 'Another Level' campaign

Move over, millennials — why Gen Z are the new big spenders

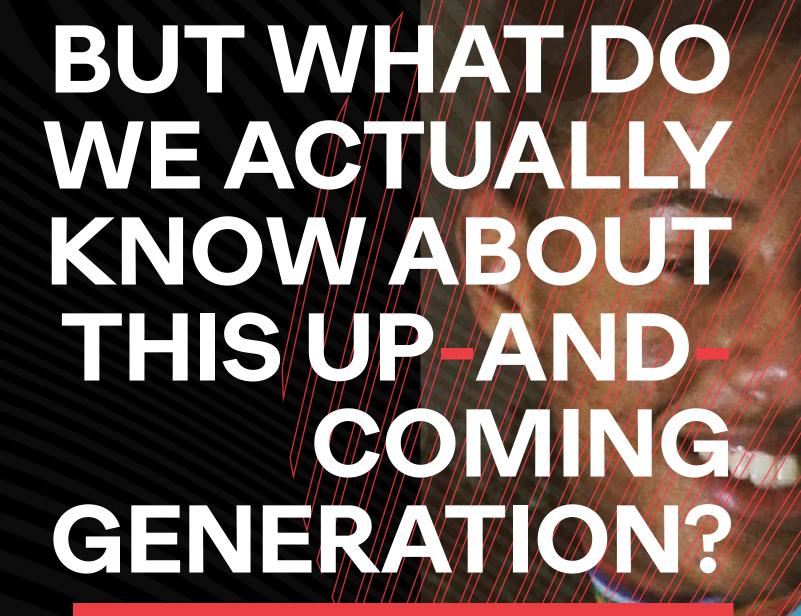


Wie is Gen Z?

De jongeren van vandaag zouden minder uitgaan, minder drinken en braver zijn. Hun gen...

AND TAKING CENTRE STAGE FOR SOCIETY, ADVERTISERS AND BRANDS.

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YOUNG

GEN Z MEMBERS ARE BETWEEN 9 AND 24 YEARS OLD.

NUMEROUS

GEN Z OUTNUMBERS THE MILLENNIALS AND ACCOUNTS FOR 32% OF THE GLOBAL POPULATION.

STUDYING

MORE THAN HALF IS STILL AT SCHOOL.

AT HOME

63% LIVES WITH THEIR PARENTS.

URBANIZED

60% LIVES IN URBAN AREAS.

DIVERSE

HALF IS RACIAL OR ETHNIC MINORITIES, WHICH IS 10% MORE THAN MILLENNIALS.

PEW Research Center (2019), *Defining generations: Where Millennials end and generation Z begins.*Bloomberg (2018). *Gen Z is set to outnumber Millennials within a year.*Snapchat & Global Web Index (June 2019) *The Youth of the Nations: Global trends among Gen Z.*

BUT ONE SIZE DOESN'T FIT ALL GEN Z COMES IN ALL SHAPES AND SIZES

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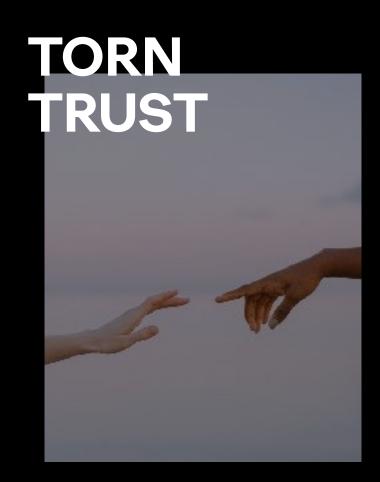
ESPECIALLY WITH SUCH A LARGE & DIVERSE AGE SPAN.

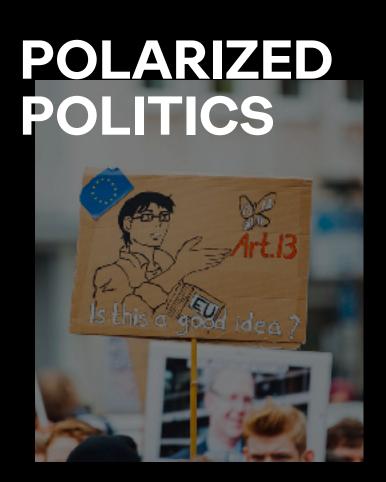






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ITALL STARTS WITHTHE CONTEXT SHAPING GEN Z.

GEN Z LEAVES THEIR ROSE-TINTED GLASSES AT HOME AND WANTS TO KEEP IT REAL.



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5. THE INFLUENTIAL INFLUENCER

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GENZ&BRANDS

1. BRAND LOYALTY REDEFINED

2. GET REAL ALREADY

3. LESS TALK, MORE ACTION

4. UNIQUELY MADE (TOGETHER)

WRAP-UP

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GENZ SCIETY









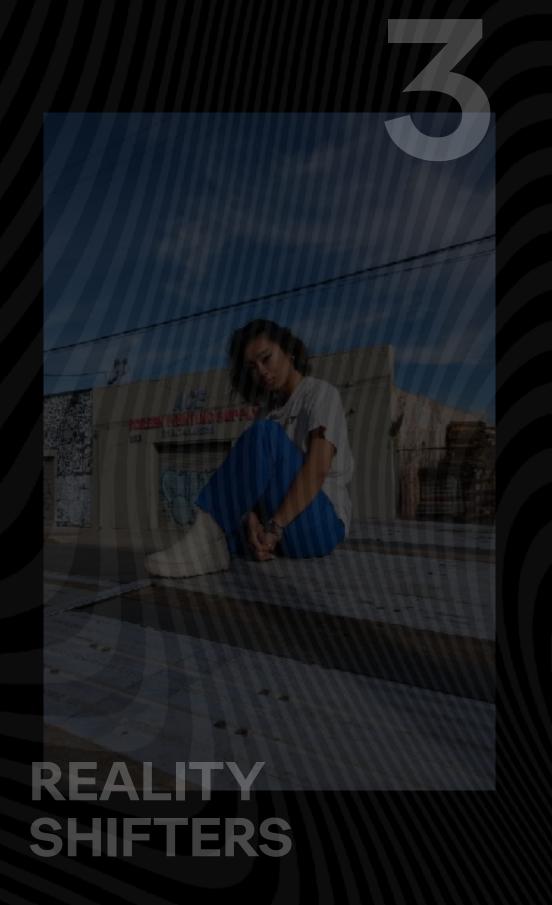


SHIFTERS

HACKERS









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GEN Z'S RELENTLESS QUEST FOR AUTHENTICITY IMPACTS THEIR LIFE.

PRAGMATIC PRIORITIES

PROGRESSIVE POSITIONING

PEER EMPOWERED ACTS

PURPOSEFUL CHOICES

PRESSURED MINDS

MONEY CONSCIOUS

67%

IS CONCERNED ABOUT NOT HAVING ENOUGH MONEY.

EQUALITY THRIVERS

74%

WANTS TO THRIVE FOR A MORE INCLUSIVE SOCIETY.

COMMUNAHOLICS

1/3

FEELS A GREATER SENSE OF COMMUNITY AMONG GEN Z DURING THE **CORONA CRISIS.**

IN LIFE

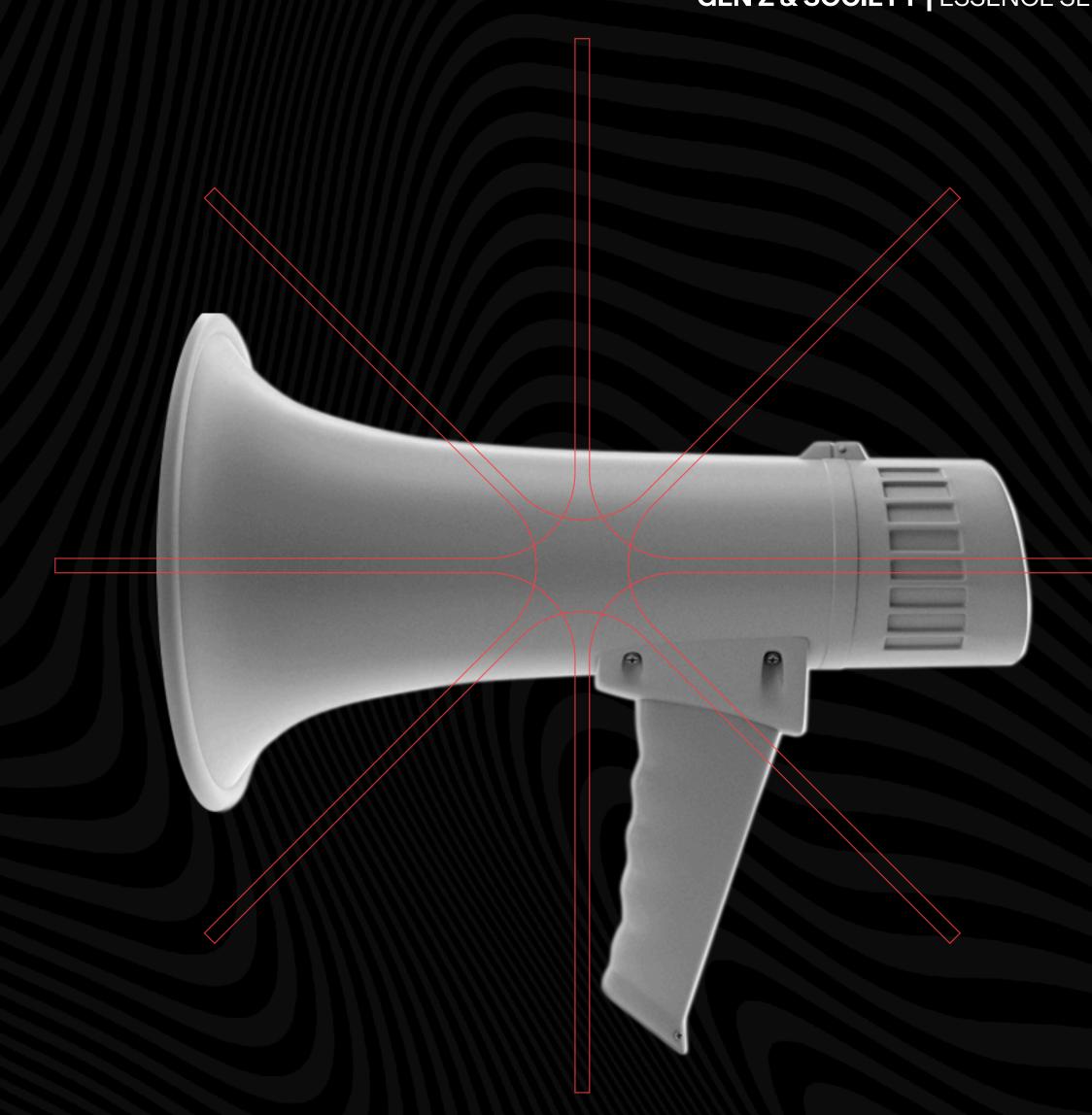
65%

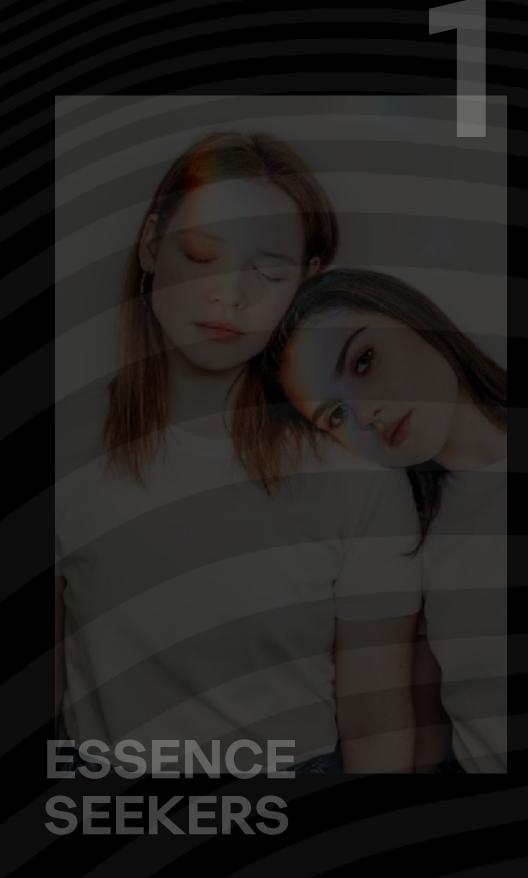
WANTS TO PERSONALLY CREATE SOMETHING WORLD-CHANGING.

FUTURE STRESS

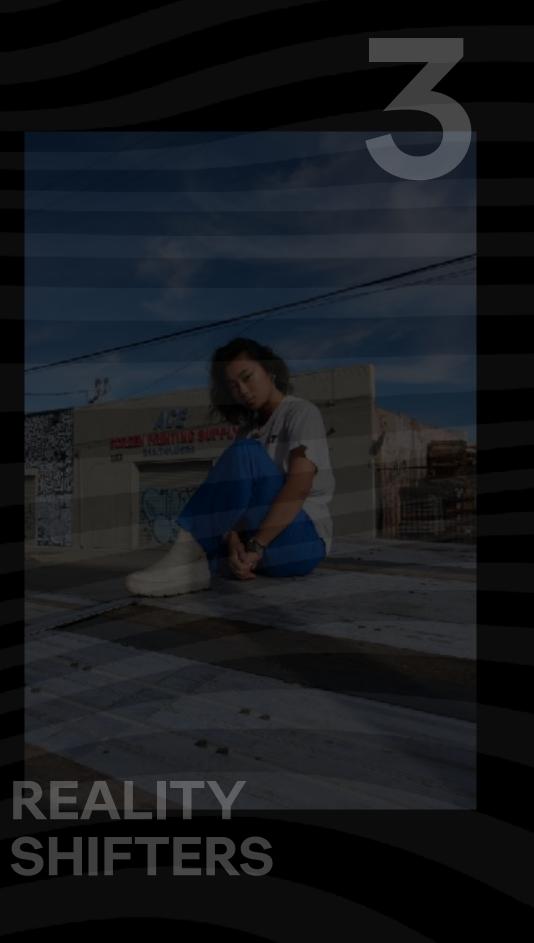
49%

OF OLDER GEN ZERS (US) FINDS THINKING OF THE FUTURE A STRESSFUL SCENARIO. BEING PRAGMATIC, PROGRESSIVE, PEER-EMPOWERED AND PURPOSEFUL IGNITED A GENERATION OF CHANGE.







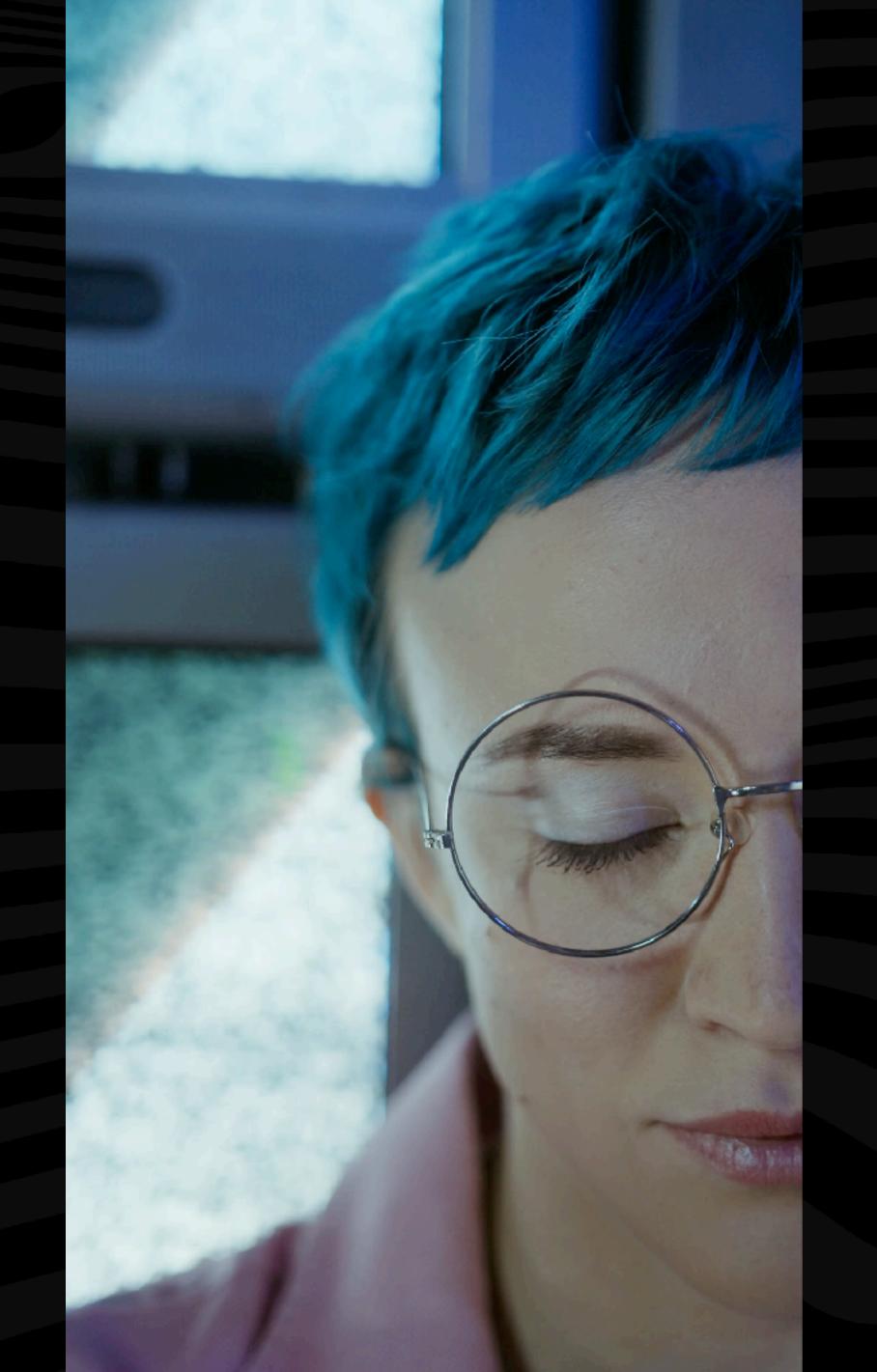




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GEN Z'S DEMAND FOR CHANGE OCCURS ON DIFFERENT LEVELS,



SOCIAL LEVEL

POLITICAL LEVEL

ECONOMICAL LEVEL

*Bloomberg (March 2019). Corporate America Can't Afford to Ignore Gen Z.

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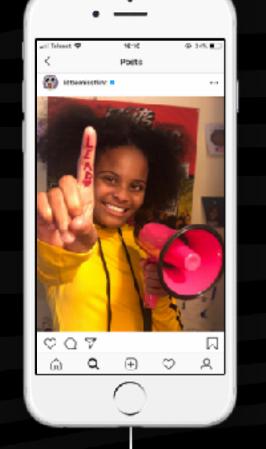
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XIUHTEZCATL MARTINEZ IS AN ENVIRONMENTAL ACTIVIST AND DRIVING FORCE BEHIND GENERATION.NOW.

MALALA YOUSAFZAI IS A
GIRLS' EDUCATION ADVOCATE
AND FOUNDER OF THE
MALALA FUND.

WITH SOCIAL OPERATING AS AN EXPRESSIVE OUTLET TO INITIATE CHANGE.





FOR INDIVIDUALS

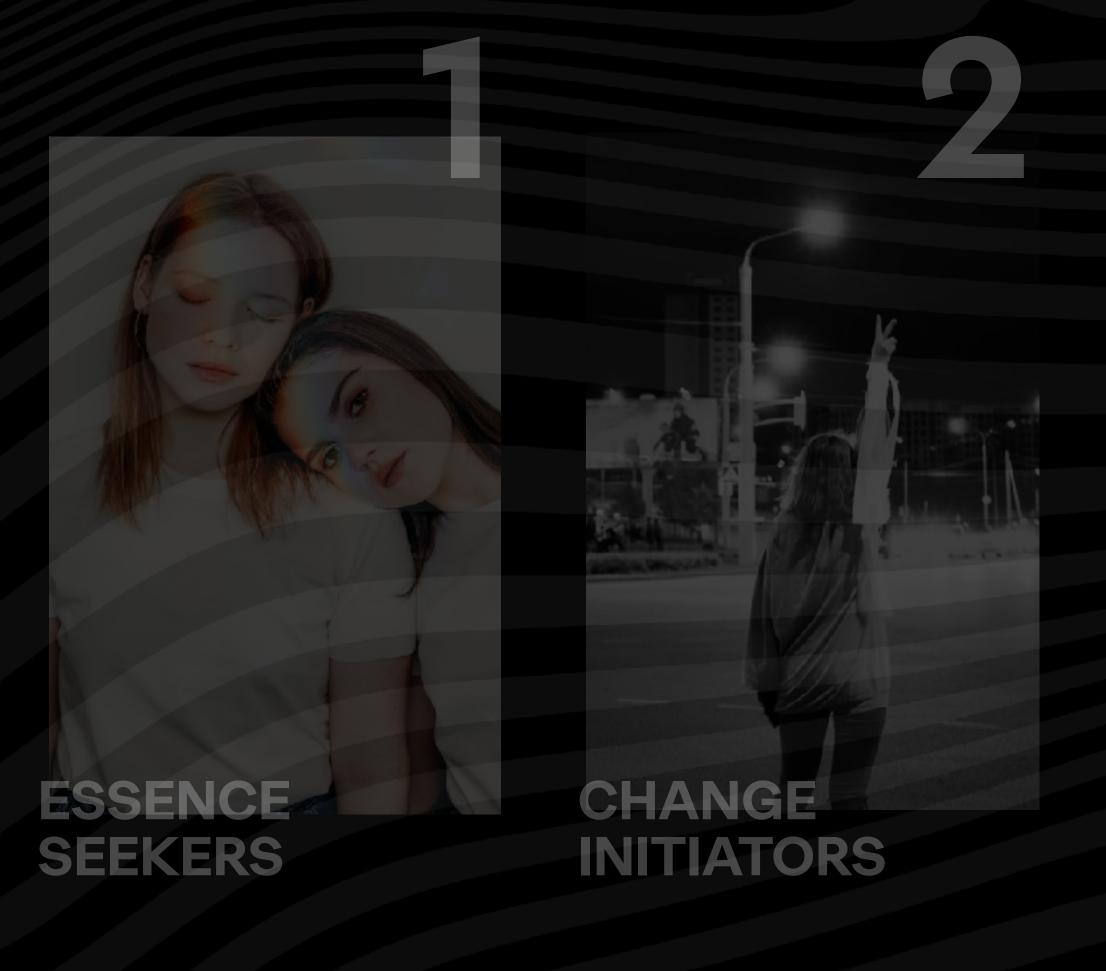


@xiuhtezcatl & @generation.now Instagram account



@Malala & @ Malalafund Instagram account

FOR COMMUNITIES







45%

EXPECT THEIR GENDER IDENTITY TO CHANGE TWO OR THREE TIMES.

GENZ EXPRESSES FLUIDITY THROUGH GENDER,

Chime for Change & Irregular Labs (May 2019). The Irregular Report: Gen Z and Fluidity.

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BUTALSO TOWN.



75%

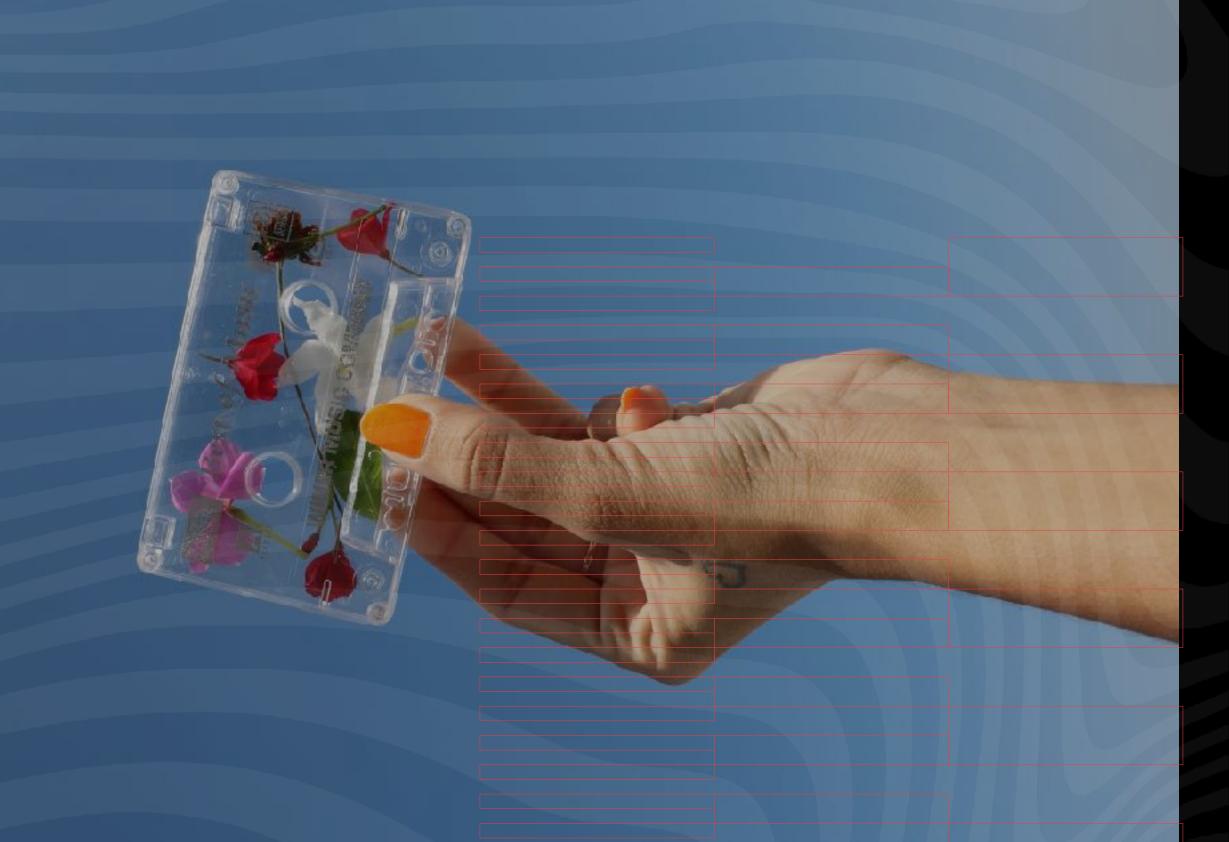
PREFER COMPANIES WITH FLUID ORGANIZATIONAL MODELS WHERE THEY CAN EXPLORE MULTIPLE ROLES.

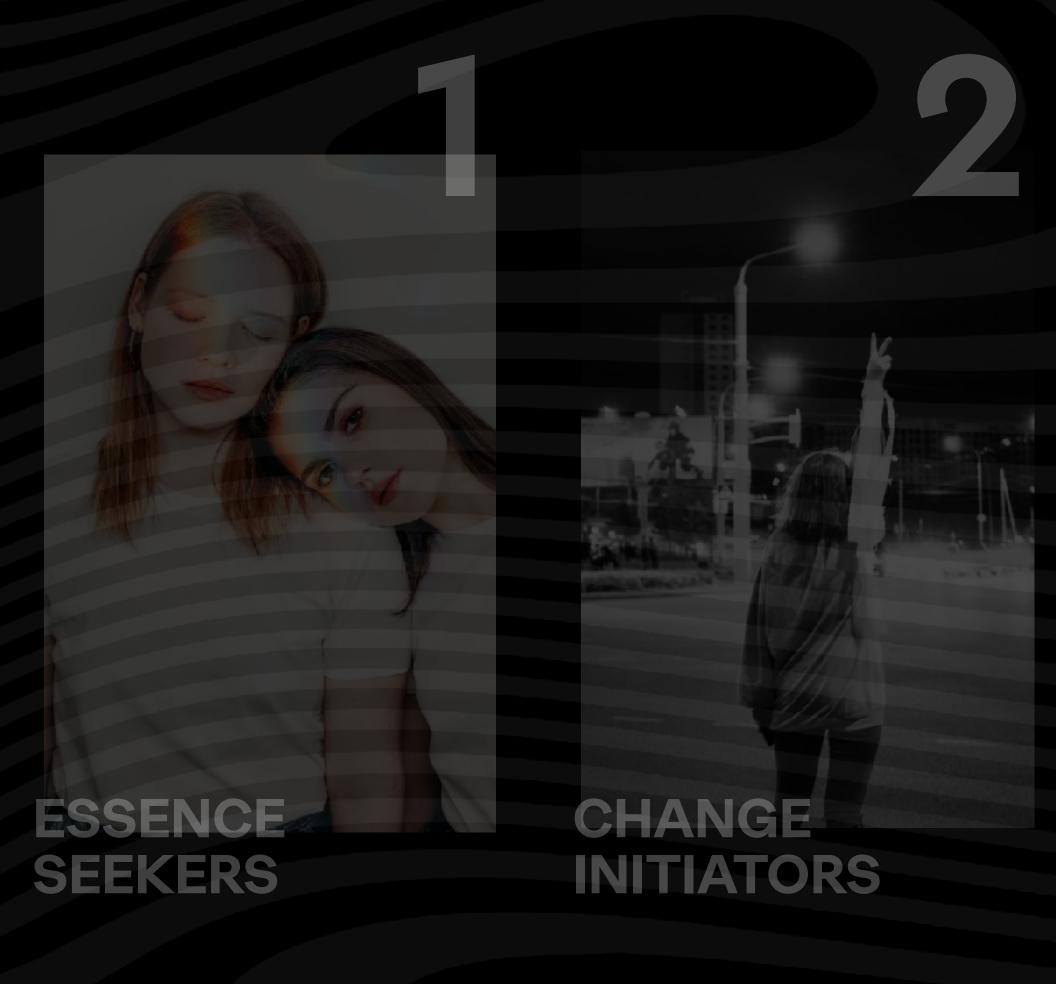
Forbes (July 2018). Gen Z In The Workforce: How To Recruit And Retain Youth Generations.

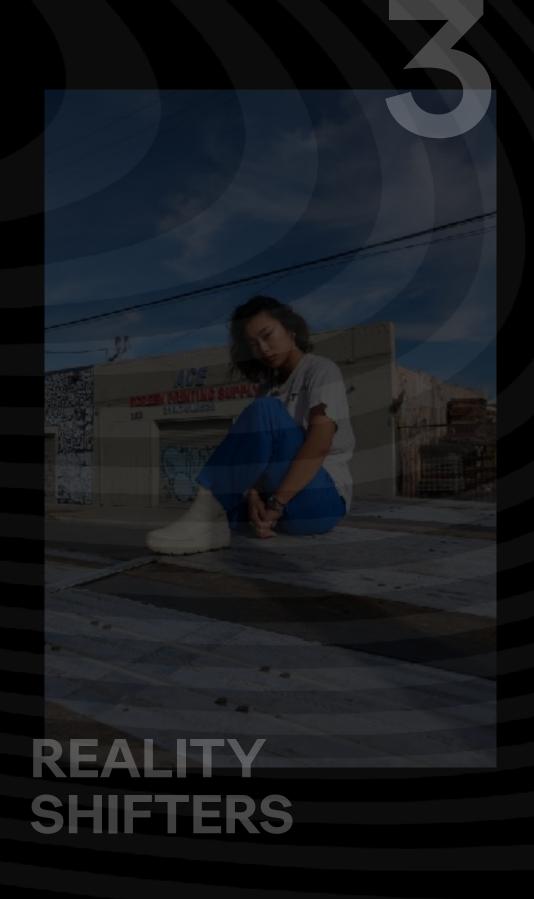
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SEARCHING FOR ESSENCE, INITIATING CHANGE AND SHIFTING REALITY SPARKED A HIGHLY CREATIVE ENERGY IN GEN Z.









CREATIVE HACKERS

LANGUAGE

IDENTITY

CULTURE

THE CREATIVE HACKING HACKING MENTALITY UNFOLDS IN DIFFERENT AREAS,



WITH SOCIAL OPERATING AS THE CREATIVE PLAYGROUND.



56%

USE SOCIAL APPS TO EXPRESS THEMSELVES CREATIVELY.

JWT x Snapchat (June 2019). Into Z Future: Understanding Generation Z, the Next Generation of Super Creatives

THE FLIP SIDE? 70% OF GENZ IDENTIFIES ANXIETY AND DEPRESSION AS THEIR GENERATION'S BIGGEST CONCERN.

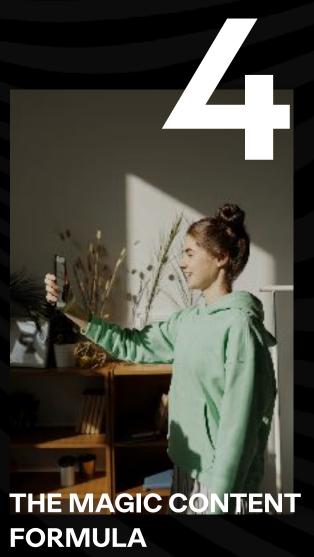


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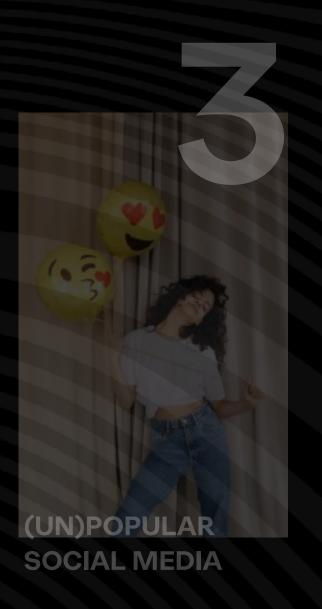




SHOPPERS
WHO V SOCIAL

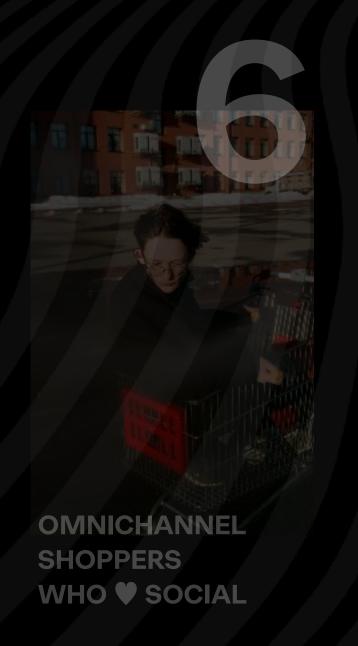












GENZTURNSTO MOBILE FOR BASICALLY EVERY ONLINE ACTIVITY

Messaging service



Visited an Use online retail site



News consumption



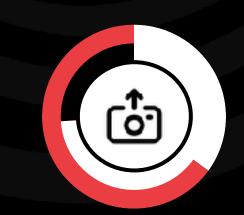
Watched a video



Used a directions service



Uploaded/shared a photo



Visited/Used
A search engine



Searched for a product/ service you want to buy



Checked the weather online



Desktop/Laptop



THEY DON'T REJECT TRADITIONAL DEVICES, BUT ENJOY SECOND-SCREENING.



81_M

IN 2020, THE DAILY TIME SPENT ON TELEVISION AMONGST GEN Z
BETWEEN 12 AND 17 YEARS OLD IS
EXPECTED TO BE 81 MINUTES.

90%

OF GEN Z USES
MOBILE WHILE
WATCHING TV.

eMarketer (2020). Five Charts: understanding Gen Z's Devices and Digital Usage. Global Web Index (2019). Gen Z - Examining the attitudes and digital behaviours of internet users aged 16-21

THE MOBILE MENTALITYHAS ULTIMATELY INFLUENCED GEN Z'S



CRAVE INSTANT EXPERIENCES

SAVVY

CAUTIOUS & ALERT

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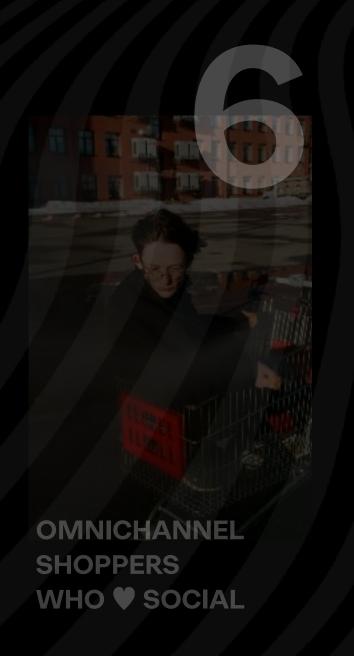












GENZ LOVES SPENDING TIME ON SOCIAL MEDIA,



2h52

IS GENZ'S TOTAL TIME SPENT ON SOCIAL ON A DAILY BASIS.

Global Web Index (2019). Gen Z - Examining the attitudes and digital behaviors of internet users aged 16-21 Mintel (September 2019). Lifestyles of gen Z (UK), p. 10 Warc (2020). Gen Z is driving changes in COVID-19 media habits

November 26, 2020



Mintel (September 2019). Lifestyles of gen Z (UK), p. 10

November 26, 2020

AND MORE PRIVATE THEN ONE MAY THINK.

November 26, 2020

"Many young people are turning to the underground trend of "Finstagram", to relieve the pressures of perfection. (...) A Finsta or a Finstagram is a second account users make to show their "real lives" to a small group of followers."

BBC, 27/09/2019

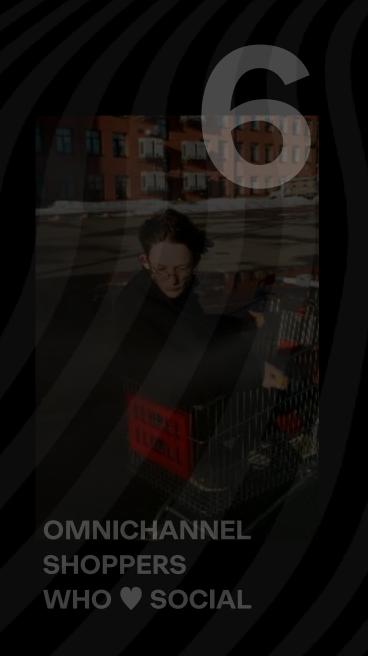






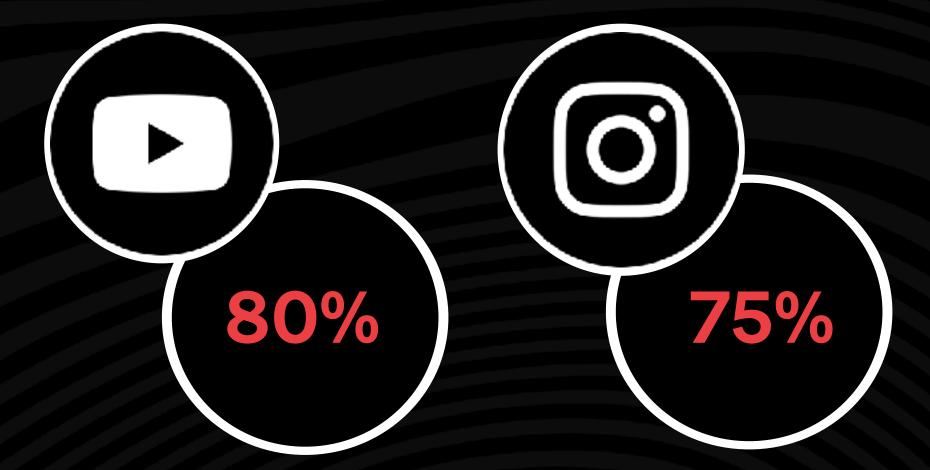






SOCIAL PLATFORMS THAT SUPPORT AND AMPLIFY GEN Z CULTURE:

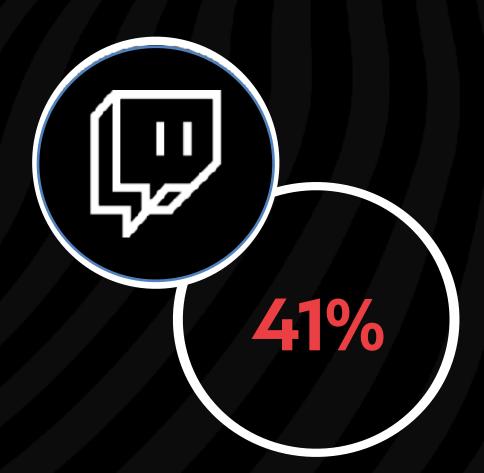
SOCIAL MEDIA PLATFORM USAGE AMONG GEN Z WORLDWIDE 16+







% OF TWITCH USERS WHO ARE BETWEEN 16-24 YEAR OLD





BEYOND ENTERTAINMENT

TO GAIN KNOWLEDGE
TO FEEL CONNECTED

WITH EACH PLATFORM WITNESSING DIFFERENT BEHAVIOURS.



EXPRESSING INTERESTS & INFLUENCER ENGAGEMENT

TO EXPRESS INTERESTS
TO ENGAGE WITH INFLUENCERS



FRIENDS & CREATIVITY

TO CONNECT WITH FRIENDS
TO EXPLORE CREATIVITY



COMMUNITY & INFLUENCER DREAM

TO CONNECT LIKE-MINDED COMMUNITY

TO MAKE INFLUENCER DREAM COME TRUE

Global Web Index (2019). Gen Z - Examining the attitudes and digital behaviors of internet users aged 16-21 Global Web Index (2020). Gen Z TiK76t data worldwide 16-23 (members, visitors, engagers, Think With Google (August 2018). Understanding Gen Z through the less of Vortube 16-18 (1919). Influence maketing Report (§ 8.05), p. 11. Facebook for Business (October 2019). Gen Z: Getting to Know the 'Me Is We' Generation.. Snapchat (§/OV/2019). Apposphere: How the Apps You Use Impact You Daily Life and Emotions.

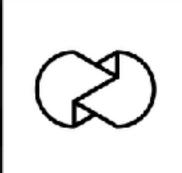
GENZIS ALSO ACTIVE ACROSS A RANGE OF NICHE PLATFORMS

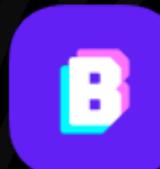








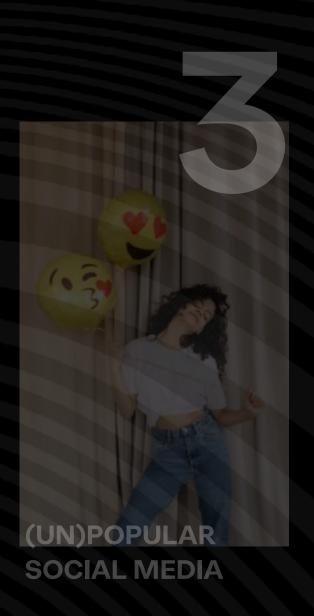




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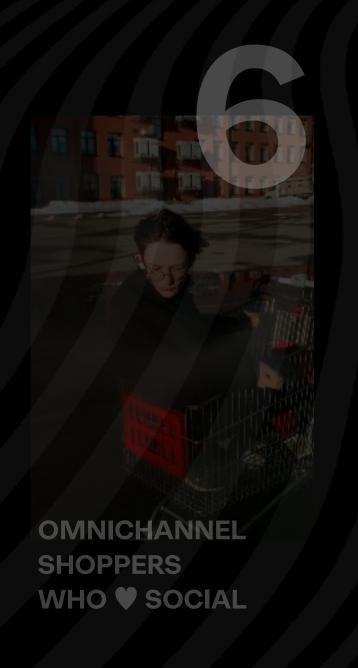




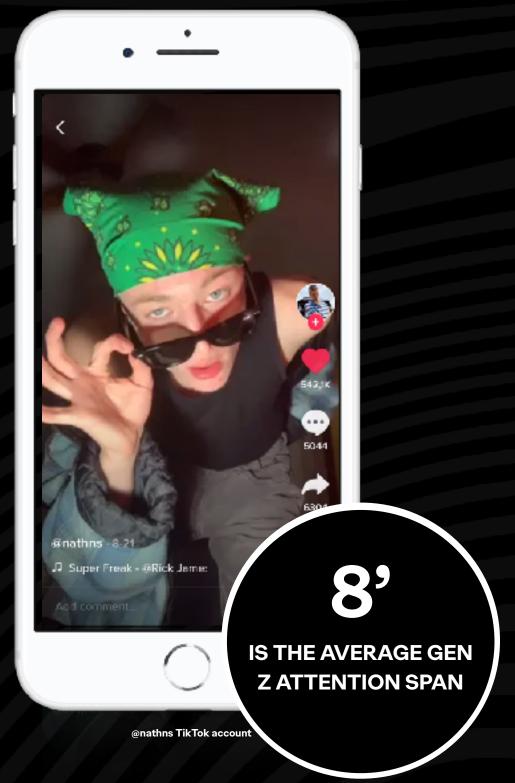








SNAPPY & BITE-SIZED

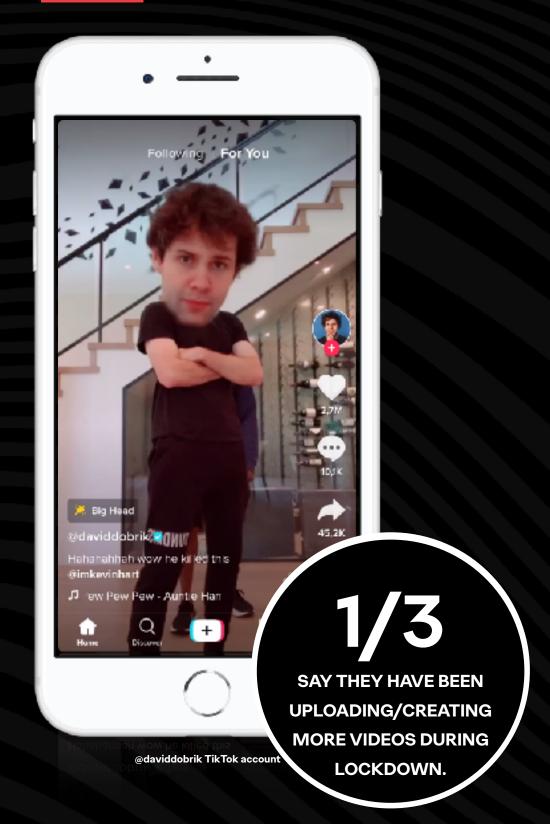


Forbes (December 2019), Customer Of The Future: 5 Ways To Create A Customer Experience For Gen Z., GWI (30/03/2020), How the outbreak is changing entertainment habits JWT x Snapchat (June 2019), Into Z Future: Understanding Generation Z, the Next Generation of

SNAPPY & BITE-SIZED



SHORT-FORMAT VIDEOS

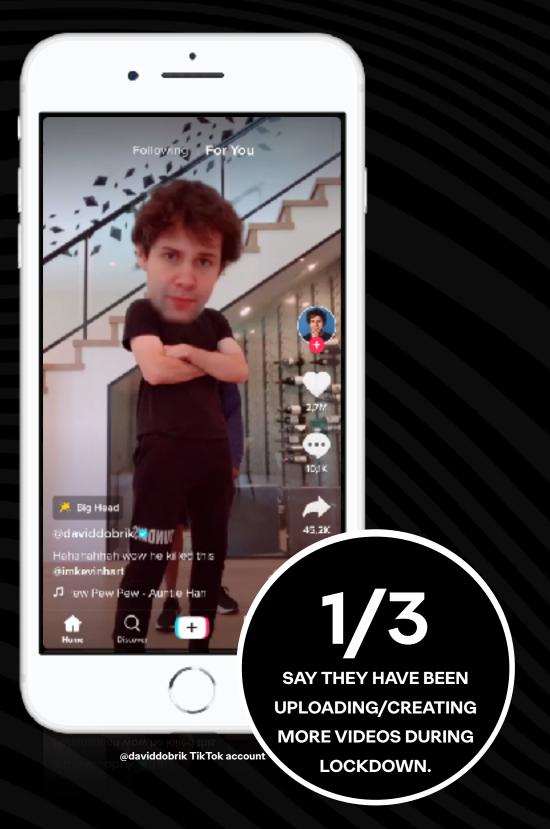


Forbes (December 2019). Customer Of The Future: 5 Ways To Create A Customer Experience For Gen Z. GWI (30/03/2020). How the outbreak is changing entertainment habits. WIT x Snapchat (June 2019). Into Z Future: Understanding Generation Z, the Next Generation of Super Creatives. p. 9.

SNAPPY & BITE-SIZED



SHORT-FORMAT VIDEOS



REAL, RAW & RELATABLE

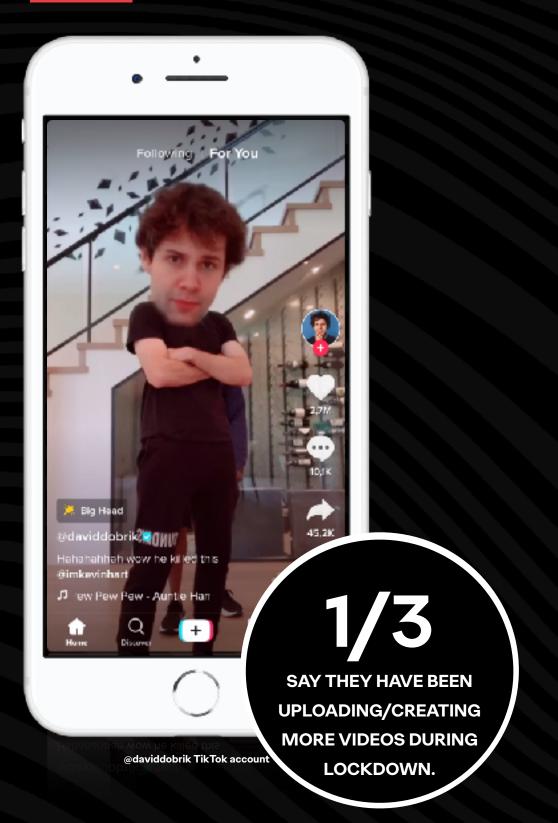


Forbes (December 2019). Customer Of The Future: 5 Ways To Create A Customer Experience For Gen Z. GWI (30/03/2020). How the outbreak is changing entertainment habits JWIT x Snapchat (June 2019). Into Z Future: Understanding Generation Z, the Next Generation of Super Creatives. p. 9.

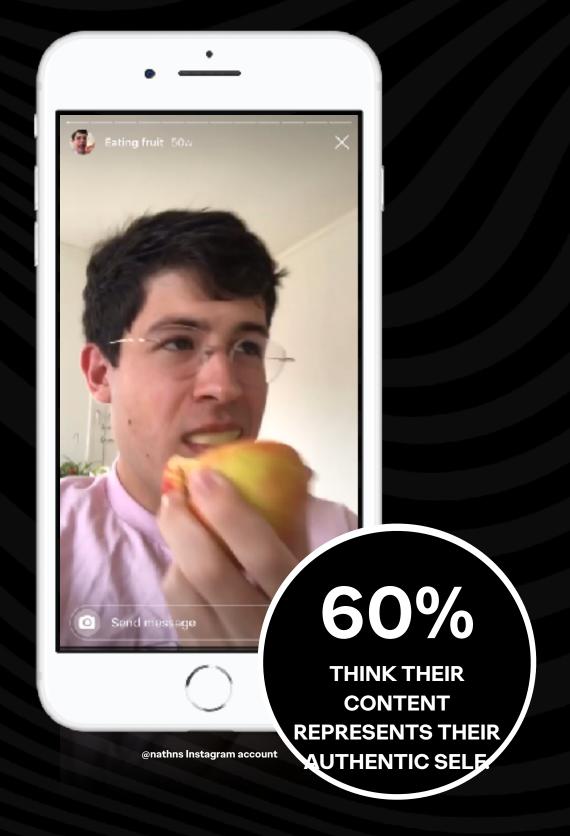
SNAPPY & BITE-SIZED



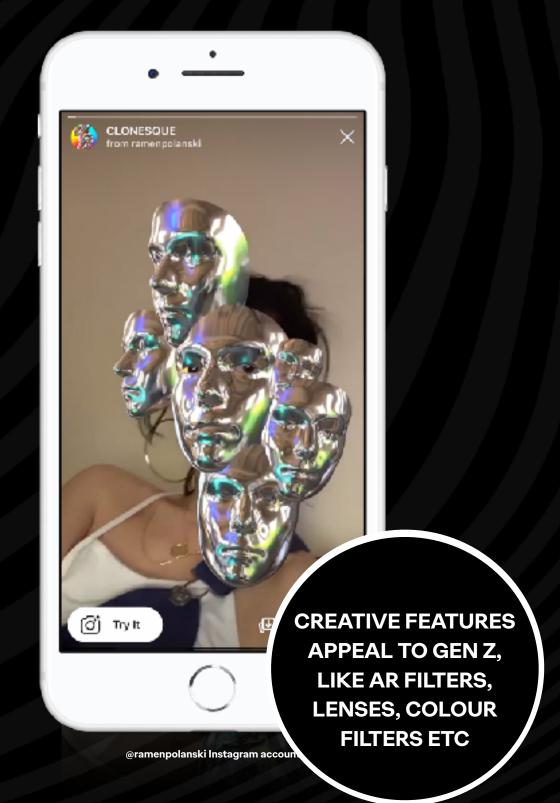
SHORT-FORMAT VIDEOS



REAL, RAW & RELATABLE



CREATIVELY INSPIRING





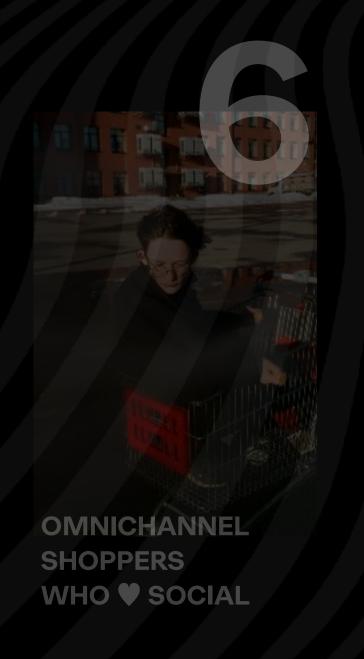




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INFLUENCERS AREBORN AND RAISED IN A SOCIAL ENVIRONMENT,



Unlike prior generations who idolized TV or movie stars, Gen Z fawns over "digital influencers"— normal teens who rose to fame through Vine, Snapchat, YouTube, or Musical.ly.

Medium, 2017

TRADITIONAL CELEB: SELENA GOMEZ

GEN Z INFLUENCER: EMMA CHAMBERLAIN

TRADITIONAL CELEBRITIES ARE NOT FORGOTTEN BUT ENGAGE LESS.





Forbes (September 2018). Don't sleep on Youtube star Emma Chamberlain.

THE INFLUENTIAL ROLE OF INFLUENCERS IS PRESENT IN GEN Z'S PERSONAL LIFE,





"Influencers are the ones who inspire their peers in their pursuit of purpose and truth, while also spreading Generation Z's message across older generations."

The Drum, 2020

AS WELL AS IN THEIR PURCHASING DECISIONS.



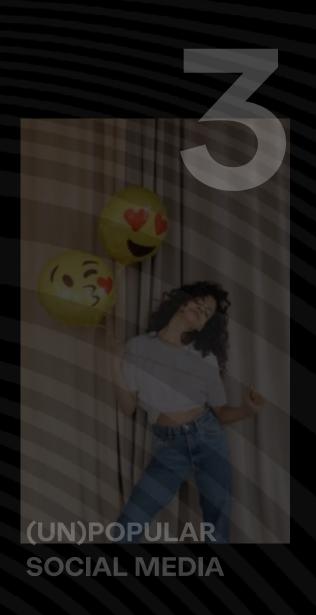
52%

OF GEN Z TRUST INFLUENCERS THEY FOLLOW TO GIVE GOOD ADVICE ABOUT PRODUCTS OR BRANDS.

Morning Consult (November 2019).. The Influencer Report: Engaging Gen Z and Millennials., p. 17.







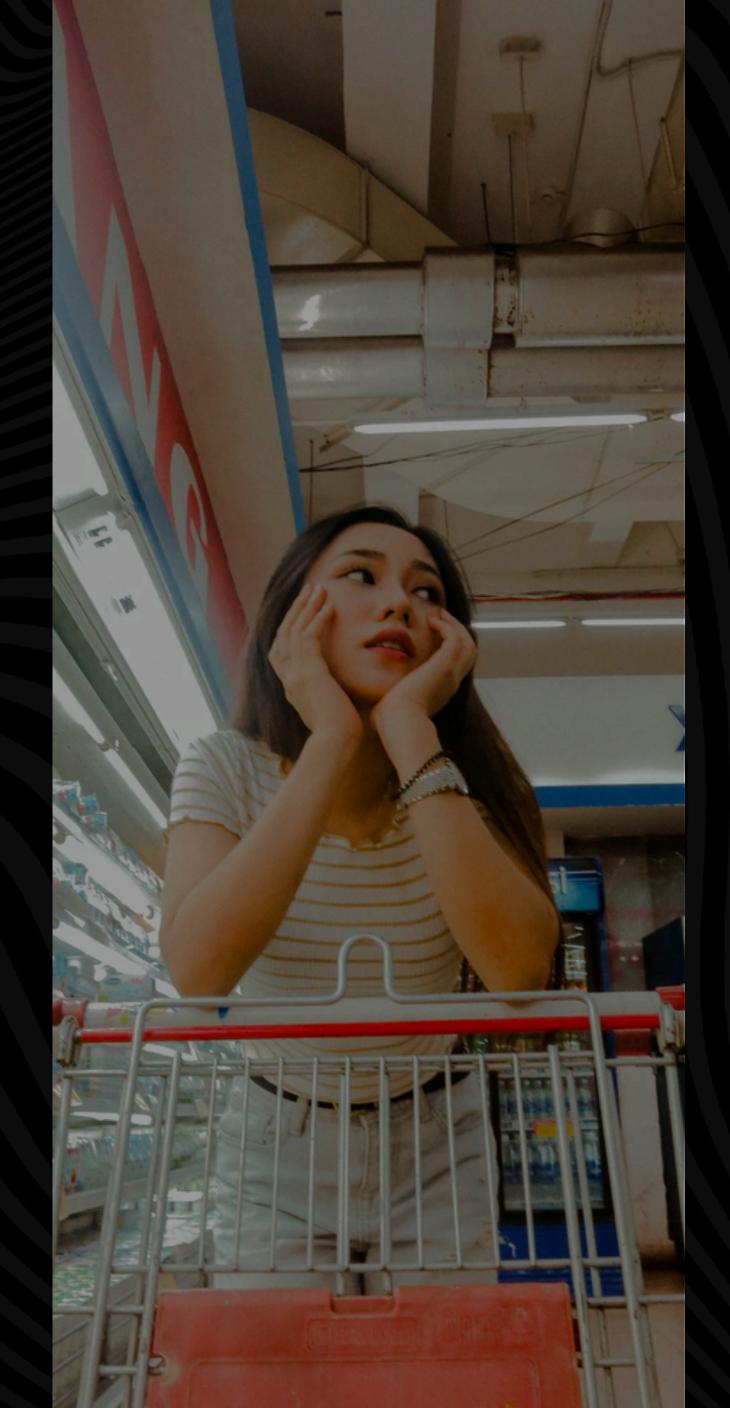
56







ONLINE SHOPPING ACCELERATES BUT DON'T UNDERESTIMATE THE VALUE OF OMNI-CHANNEL **EXPERIENCES TO** GENERATE BUZZ & TALKABILITY.



"Gen-Z expects a strong omnichannel experience and to be able to consistently experience the brand both in store and online."

Forbes, December 2019

Forbes (2/12/2019). Customer Of The Future: 5 Ways To Create A Customer Experience For Gen-Z.

SOCIAL MEDIA IS CLOSELY INVOLVED IN GEN Z'S SHOPPING JOURNEY

1/4

INSPIRATION

OF GEN Z SEEKS FOR INSPIRATION ON SOCIAL MEDIA.

55%

BRAND DISCOVERY

OF GEN ZERS (US) SAY THAT
THEIR MOST RECENT FASHION
PURCHASE WAS INSPIRED BY
SOCIAL MEDIA BROWSING

Nr. 1

PRODUCT RESEARCH

SOURCE FOR GEN Z TO RESEARCH PRODUCTS.

Adobe (October 2019). Reasons for using social networks, by generation.
eMarketer (July 2019). Consumers Are Influenced by Brands on Social.
Global Web Index (2019). Gen Z - Examining the attitudes and digital behaviours of internet users aged 16-21



BRAND DISCOVERY

WITH EACH SOCIAL PLATFORM PLAYING A DIFFERENT ROLE.



PRODUCT/SERVICE RECOMMENDATIONS



DOCUMENTATION OF PURCHASES





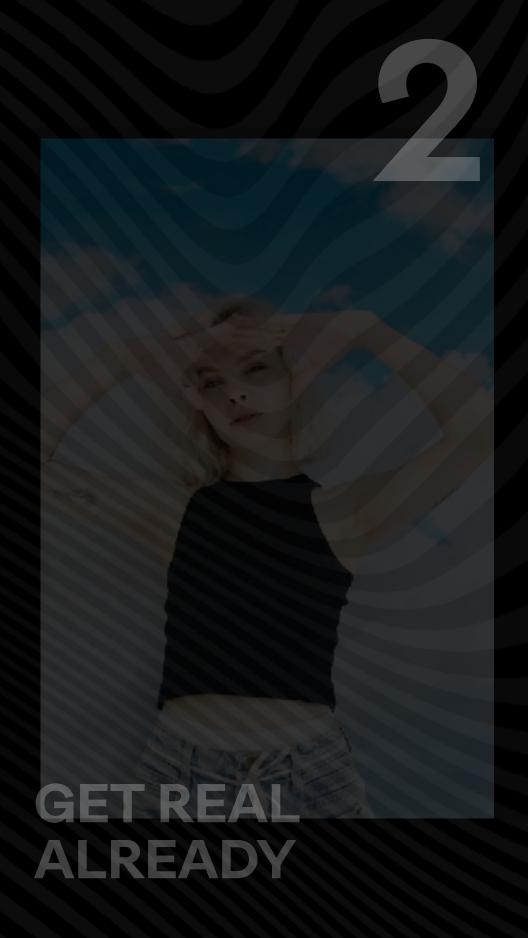


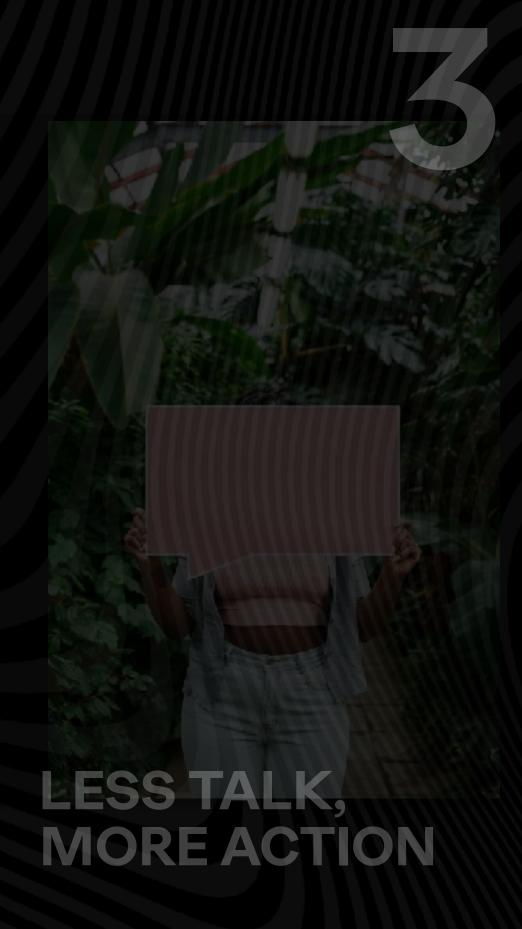


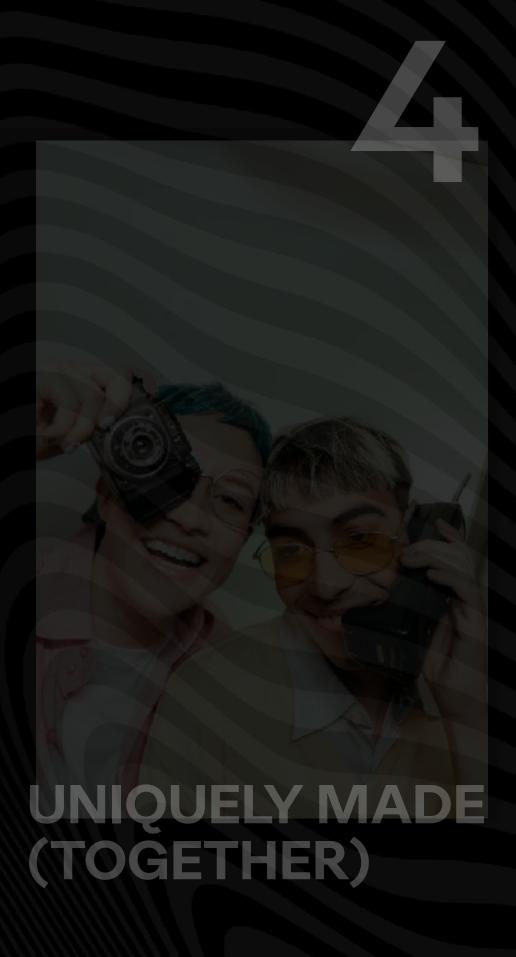








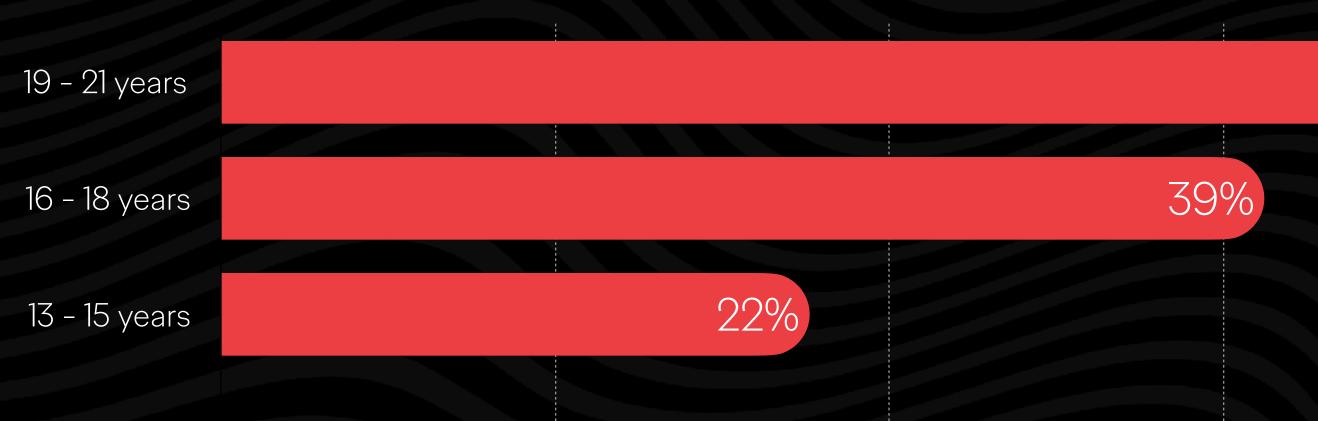




BUILDING STRONG BRAND CONNECTIONS WITH GEN Z IS NOT EASY.

Brand loyalty among Gen Z

% of Gen Zers that say they have a strong connection or loyalty to any brand



BUILDING BRAND LOYALTY BECOMES TWICE AS MORE DIFFICULT AMONG YOUNGER AGE GROUPS



DIGITAL AGE

AS DIGITAL AND SOCIAL NATIVES, GENZ HOLDS DIFFERENT EXPECTATIONS FOR BRANDS.



MEET THREE TYPE OF GEN Z BRAND LOYALISTS WITH EACH SPECIFIC EXPECTATIONS

BRAND DEVOTEES Keen to advocate (on social media) if brands proofs to be authentic, provides engagement and co-creation opportunities, and continues to refresh the product range.

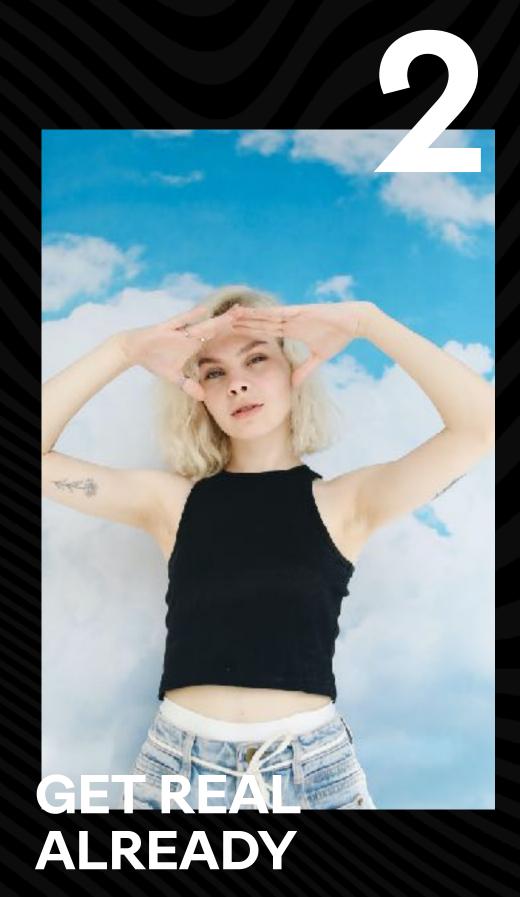
BRAND CONNECTORS

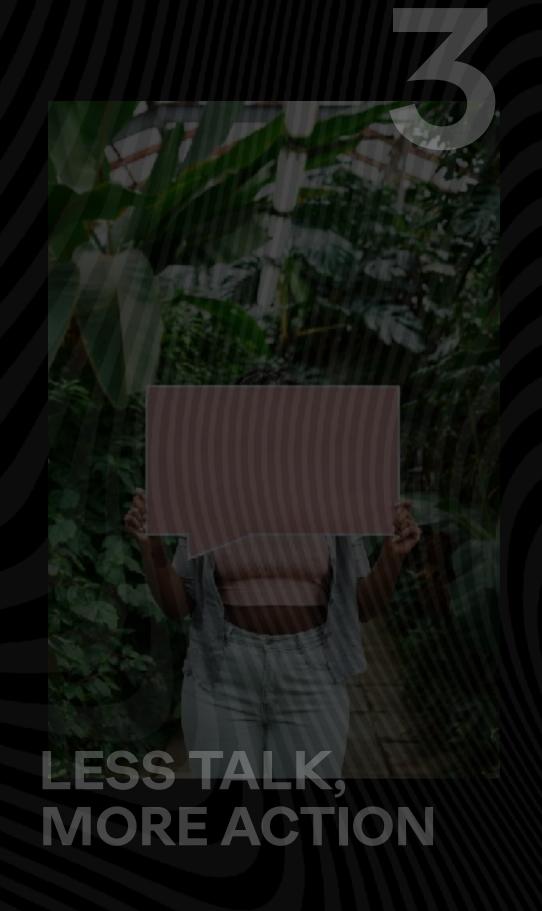
More tolerant towards authenticity but want their values and expressions to be taken into account individually.

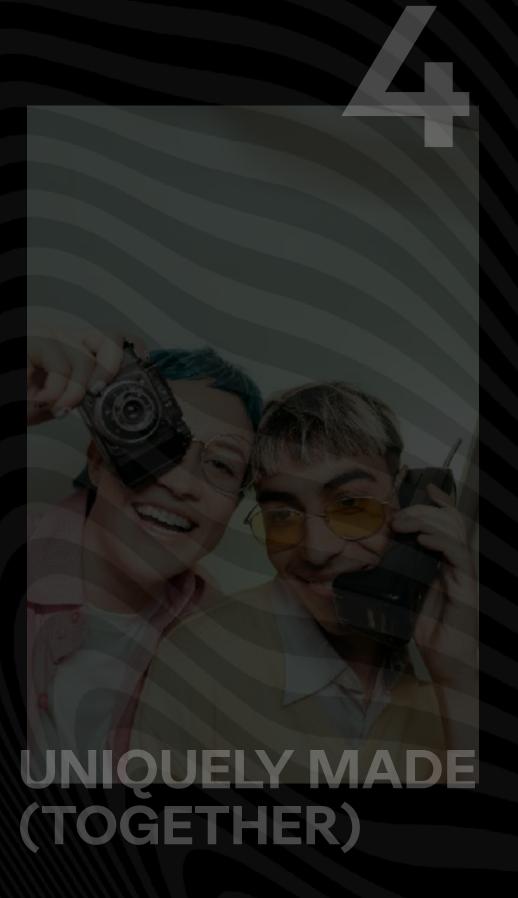
BRAND PRAGMATICS

Care about the basics: quality, value, and availability.

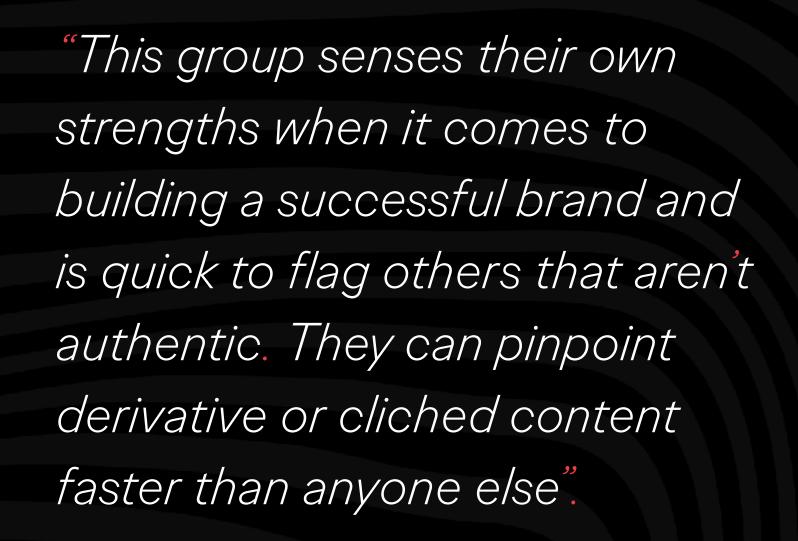








GEN Z'S CRITICAL EYE URGES BRANDS TO GET REAL



AdAge, April 2019

BY DELIVERING QUALITY ON A PRODUCT AND SERVICE LEVEL

65%

QUALITY PRODUCTS/SERVICES

OF GEN Z PREFERS TO BUY HIGH-QUALITY PRODUCTS OVER LOWER QUALITY ONES.

75%

QUALITY PRODUCTION PROCESSES

OF GEN Z IS WILLING TO PAY MORE FOR SUSTAINABLE PRODUCT ITEMS.

82%

QUALITY CUSTOMER FEEDBACK

OF GEN Z ARE MORE LIKELY TO SUPPORT BRANDS WHO MAKE CHANGES BASED ON CUSTOMER FEEDBACK.

BUT ALSO ON A COMMUNICATION LEVEL.

80%

REAL VISUALS

OF GEN Z HAS MORE TRUST IN BRANDS WHEN THEY DO NOT USE PHOTOSHOP.

38%

REAL CONTENT

OF GEN Z CLAIMS TO STOP USING A BRAND WHEN THEIR ADS INCLUDED FALSE CLAIMS.

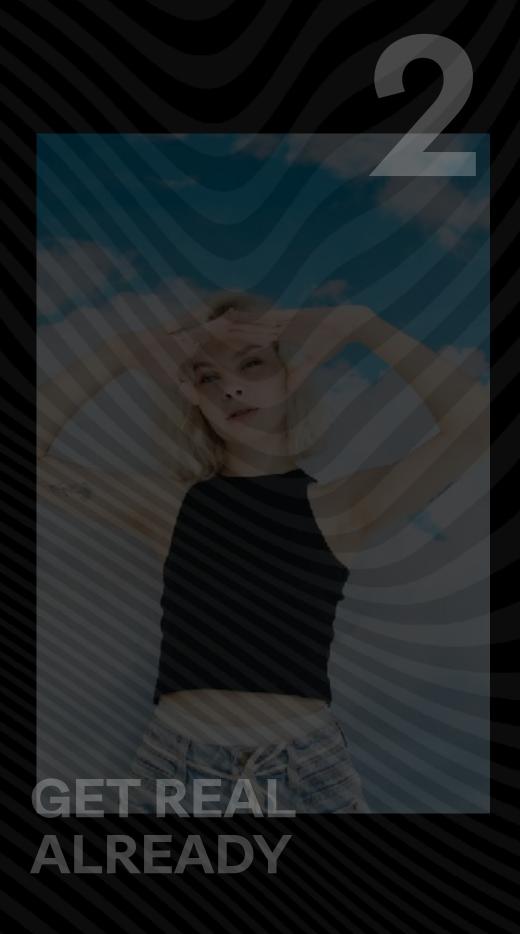
60%

HONEST DATA USE

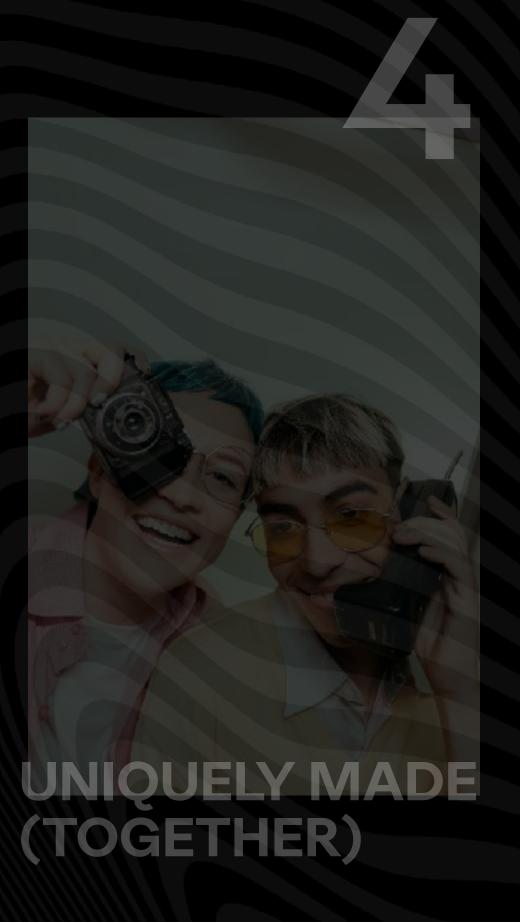
OF GEN Z WORRY ABOUT HOW BRANDS USE THEIR PERSONAL DATA.



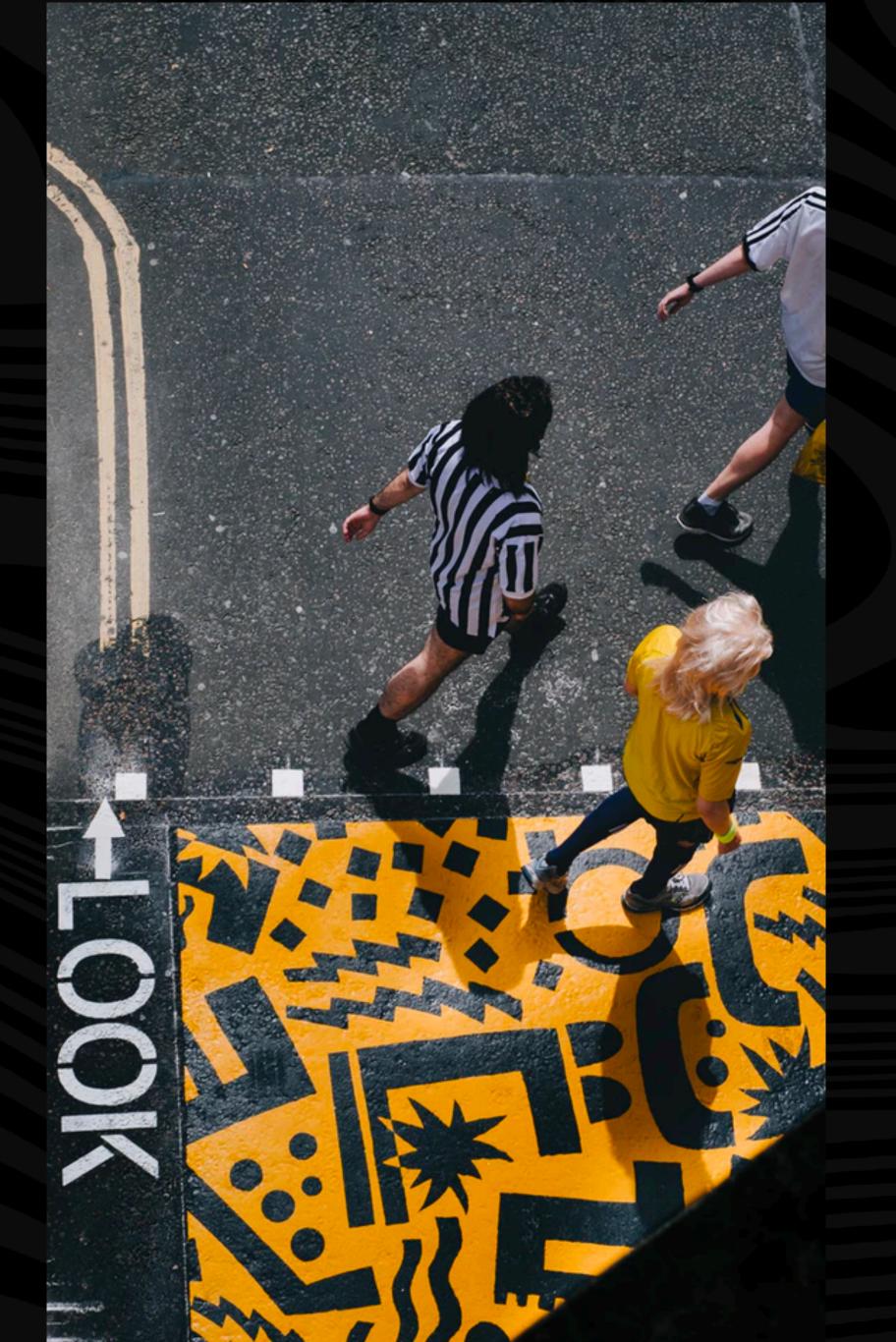








THEY WANTS BRANDS TOSHOW SOCIETY AMORE PURPOSEFUL WAY



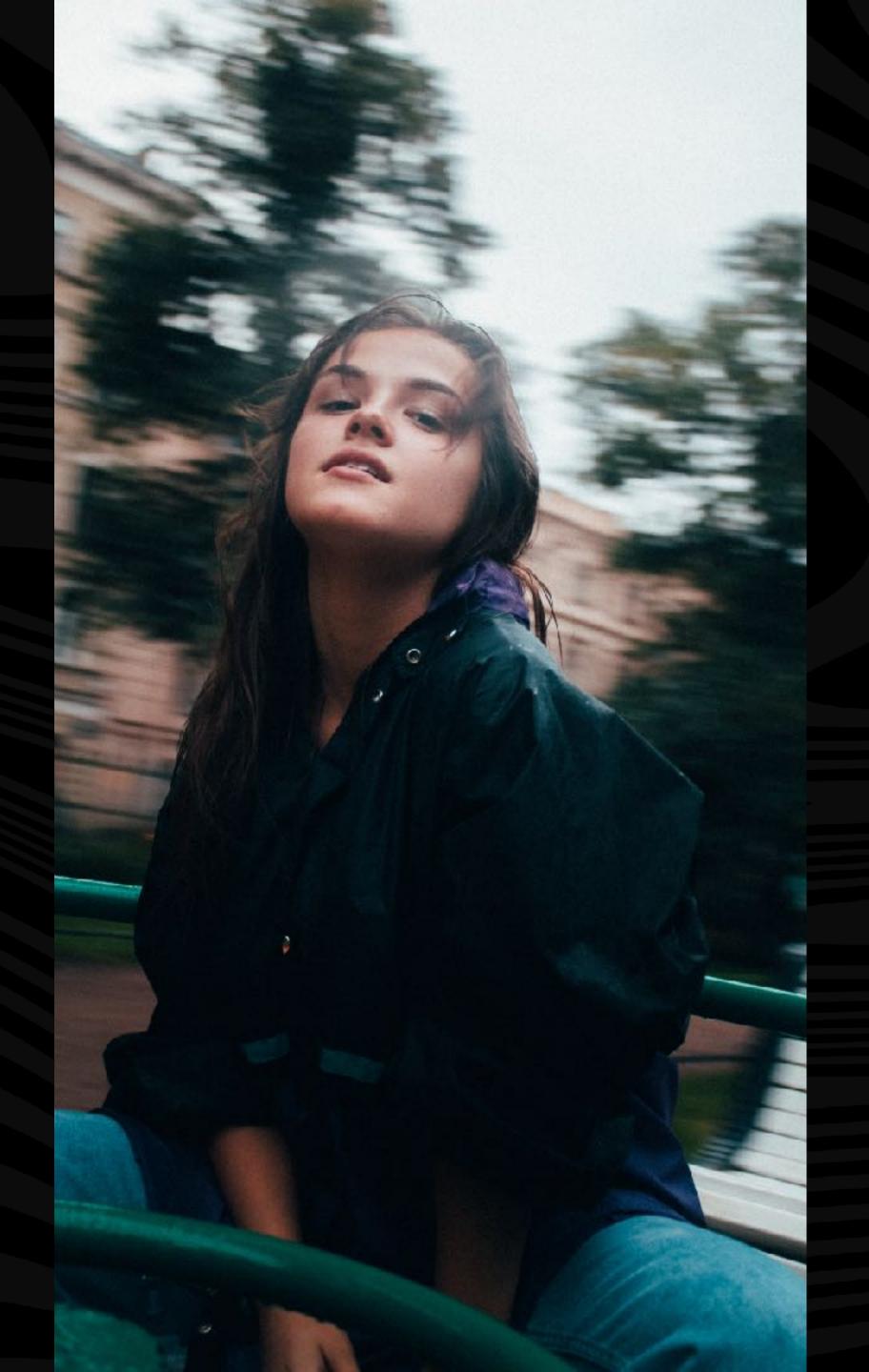
68%

EXPECT BRANDS
TO CONTRIBUTE TO SOCIETY.

Facebook for Business (October 2019). Gen Z: Getting to Know the 'Me Is We' Generation.

November 26, 2020

PUTTING THEIR MONEY WHERE THEIR MOUTH IS,



SUPPORT

OF GEN Z WOULD PURCHASE FROM A BRAND FOR THE ISSUES THEY SUPPORT.

BOYCOTT

67% OF GEN Z WOULD STOP PURCHASING FROM A BRAND IF THE VALUES OR ACTIONS DON'T ALIGN WITH THEIR OWN.

Forbes (June 2018). Engaging Gen Z In Your Social Impact Efforts.

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CHOOSING WORKPLACES THAT ALIGN WITH THEIR VALUES,



3/4

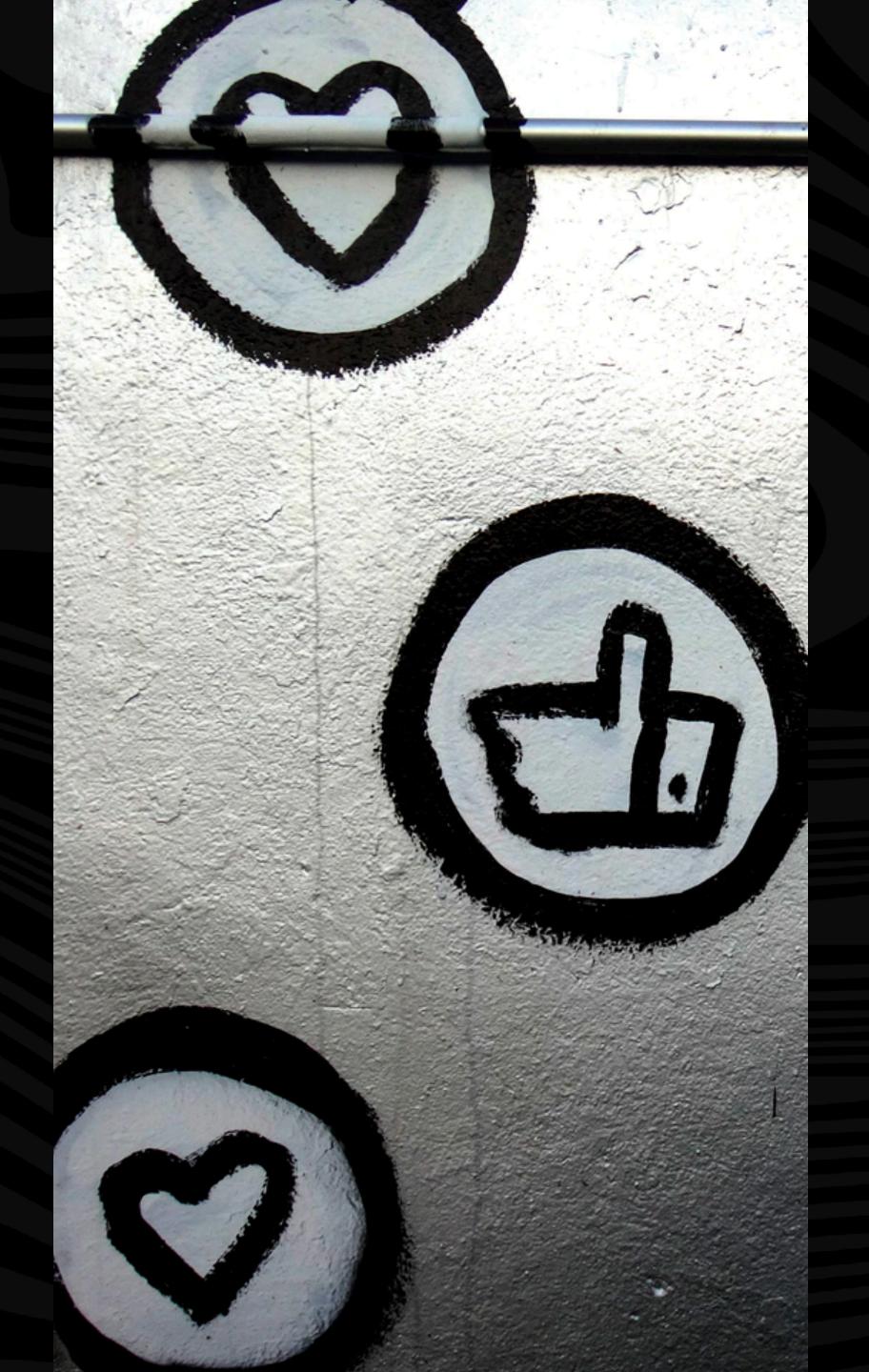
OF GEN Z FIND BRAND PURPOSE MORE IMPORTANT THAN PAY.

AdAge (February 2020). Opinion: why brand purpose is the way to our gen z hearts (and wallets).

November 26, 2020

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AND BY CONTRIBUTING TO THE BRAND'S RELEVANCE.



50%

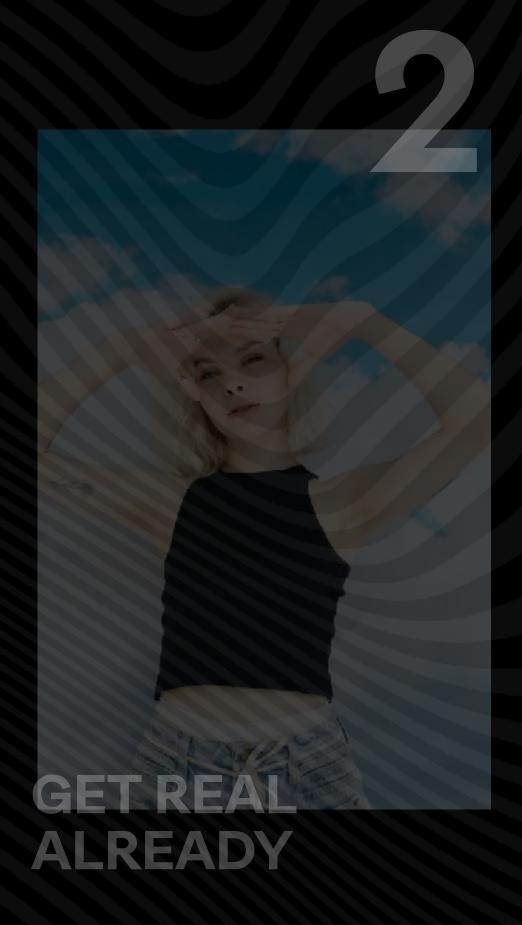
OF GEN Z IS MORE LIKELY THAN OTHER GENERATIONS TO ENCOURAGE OTHERS IN TRYING A BRAND WHEN VALUES ALIGN.

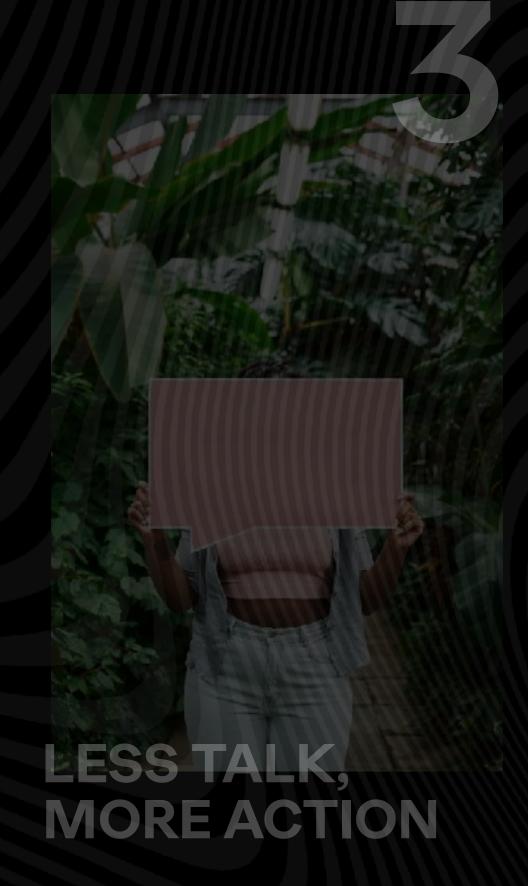
Facebook for Business (November 2019). Build Better Brand Connections With Gen Zers and Millennials.

BESIDES RESONATING WITH BRANDS TAKING PURPOSEFUL ACTIONS. GENZ CONNECTS WITH BRANDS WHO VALUE INDIVIDUAL **EXPRESSION**











GENZEXPECTS
TO SEE DIVERSITY
OF INDIVIDUAL
EXPRESSION
REPRESENTED IN
ADVERTISING.



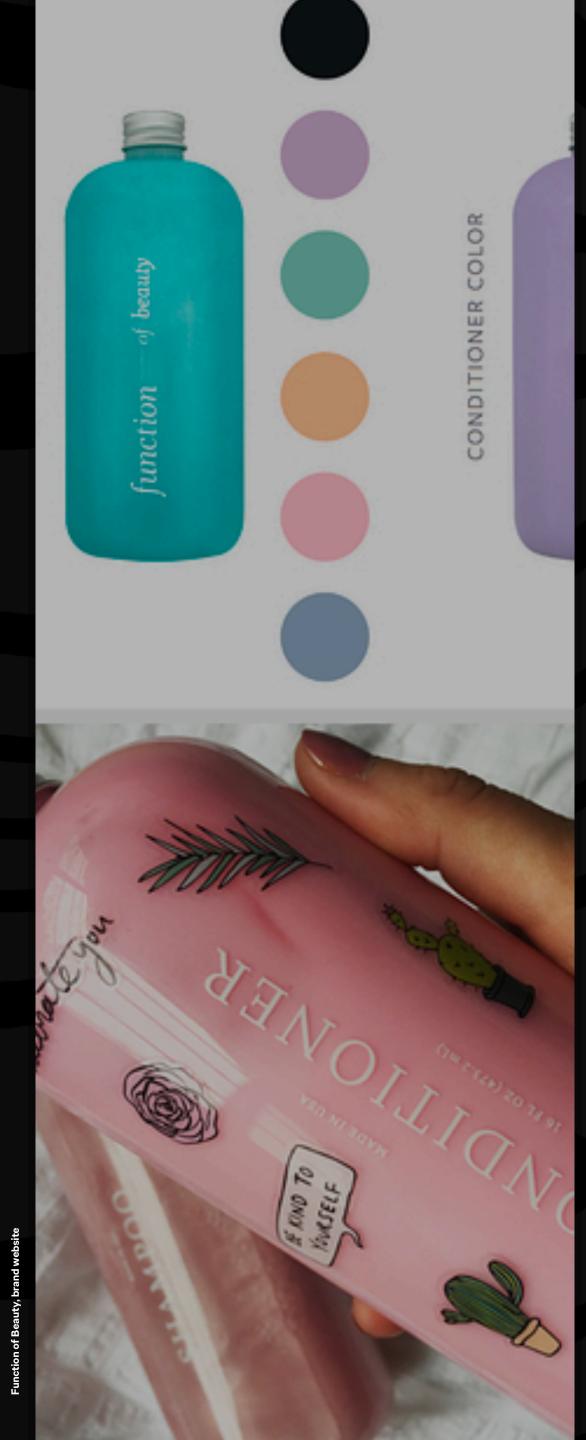
GEN Z IS THE PROUD HOME OF ETHNIC DIVERSITY, GENDER FLUIDITY, NON-TRADITIONAL RELATIONSHIPS, THE DIFFERENTLY ABLED AND SO MANY MORE.

CREATIVE PERSONALISATION



GEN Z IS ACTIVELY LOOKING FOR PERSONALIZED PRODUCTS AND SERVICES, AND EXPECTS THE SAME FROM BRAND COMMUNICATIONS.

OR BY ENABLING CO-CREATION OPPORTUNITIES.



OF GEN Z WOULD SUBMIT FOR PRODUCT DESIGN.

43%

OF GEN Z WOULD
PARTICIPATE IN
PRODUCT REVIEWS.

IBM (2018). What Do Generation Z Shoppers Really Want?

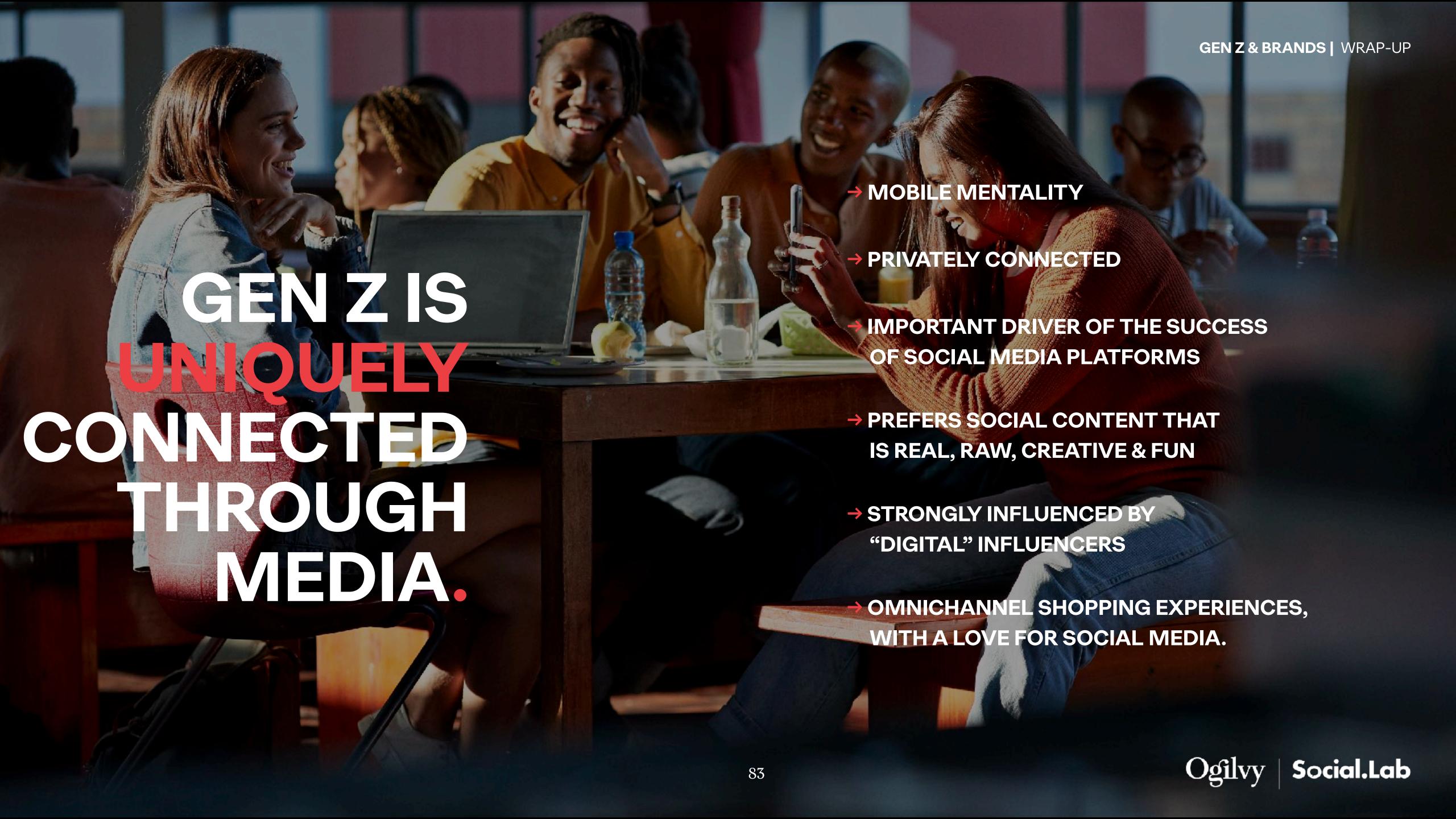
November 26, 2020

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GENZIS EAGER

TOUNIOUELY

CONNECT WITH BRANDS WITHOGET IT.

BRAND LOYALTY REDEFINED

EARNING BRAND LOYALTY REQUIRES BRANDS
TO MEET SPECIFIC DEMANDS AND EXPECTATIONS
WITHIN A DIGITAL, MOBILE & SOCIAL ENVIRONMENT.

GET REAL ALREADY

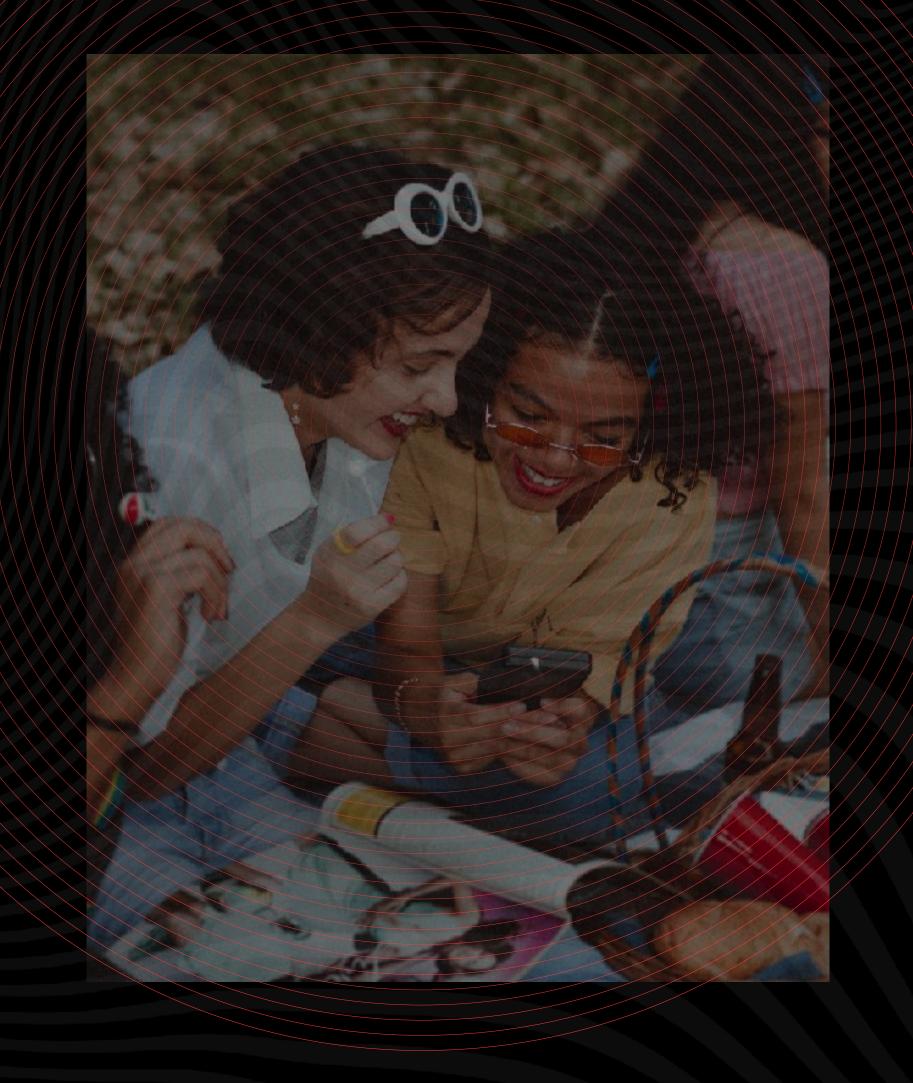
GEN Z KNOWS HOW TO SEPARATE THE TRUTH FROM THE LIES. SO, AIM TO BE THE YOUR MOST AUTHENTIC SELF.

LESS TALK, MORE ACTIONS

THE TIME OF LOFTY PROMISES IS OVER, GEN Z WANTS BRANDS TO TAKE ACTION.

UNIQUELY MADE (TOGETHER)

MEET THE UNIQUE NEEDS OF GEN Z THROUGH PERSONALISATION OR CO-CREATION.



Ready to connect with Gen Z?

Please contact us

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- Awie Erasmus (awie.erasmus@ogilvy.com)

ALL IMAGES & VIDEOS ARE RETRIEVED FROM PEXELS & UNSPLASH..

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Questions?

Ogilvy Consulting

Thank you.