

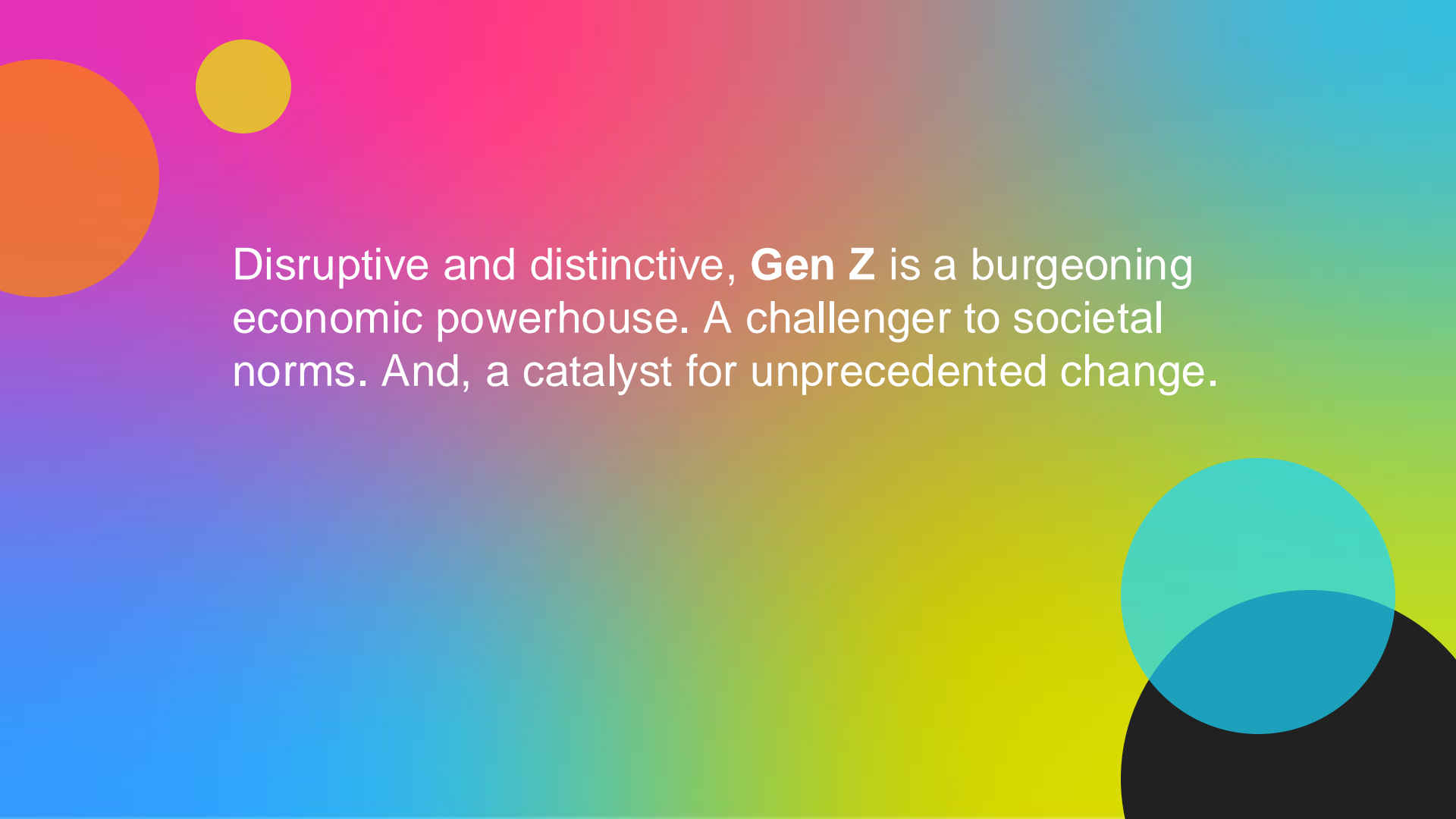
What moves Gen Z?

November 2024

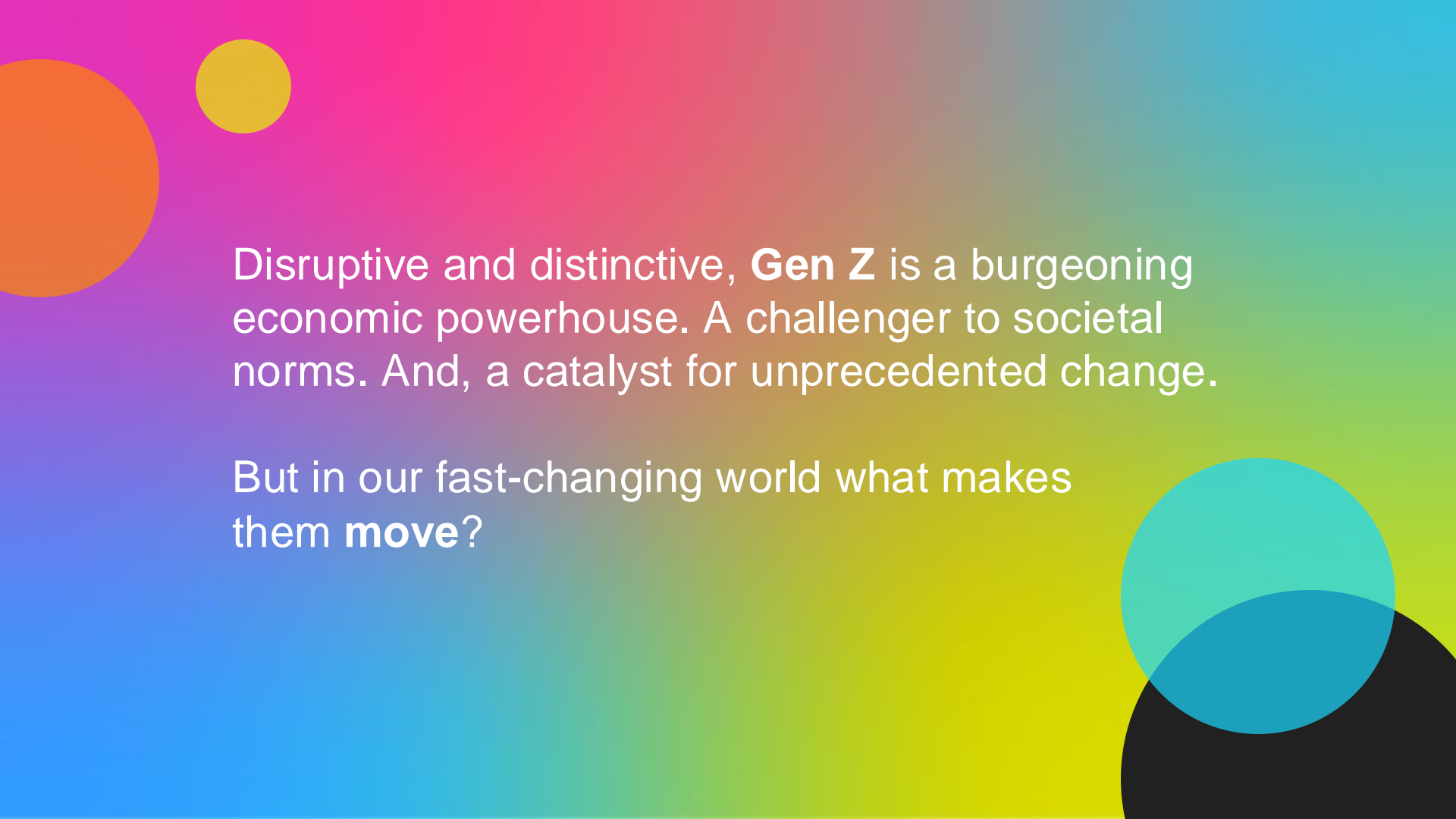
CENSUS
2030 ✓



Confidential - Not for Public Consumption or Distribution



Disruptive and distinctive, **Gen Z** is a burgeoning economic powerhouse. A challenger to societal norms. And, a catalyst for unprecedented change.



Disruptive and distinctive, **Gen Z** is a burgeoning economic powerhouse. A challenger to societal norms. And, a catalyst for unprecedented change.

But in our fast-changing world what makes them **move**?

Gen Z is unlike any generation who've gone before and about who we can **make no assumptions.**

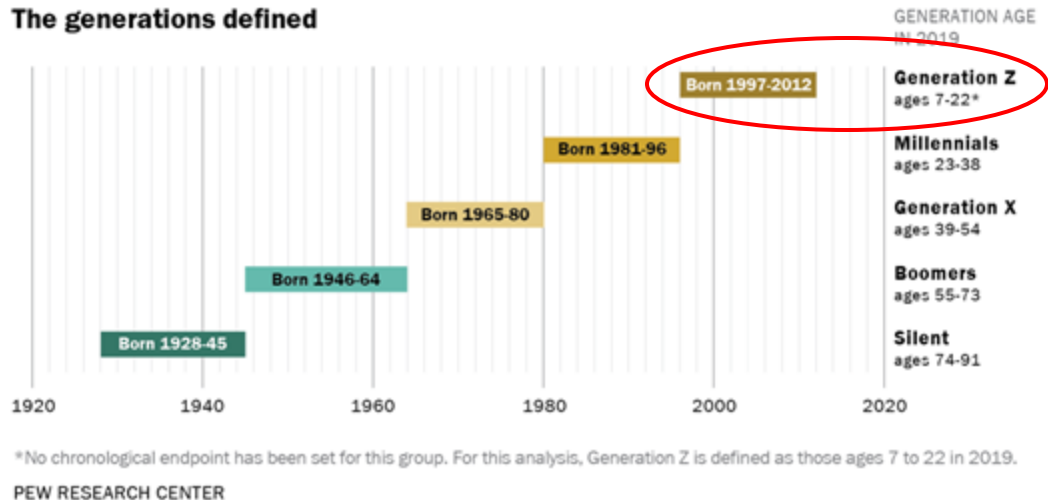


Gen Z in Numbers

Now aged 12-27, born between 1997 and 2012, they account for roughly 24% of the U.S. population, some 82 million people.

By 2030, Gen Z will all be adults, (18-33) making many heads of households.

The generations defined



One-in-four members of Gen Z are Hispanic

% of 7- to 22-year-olds who are ...



They're the most diverse generation in the history of the country. And what matters to Gen Z is their "identity".

1 in 5
Identify as
LGBTQ+

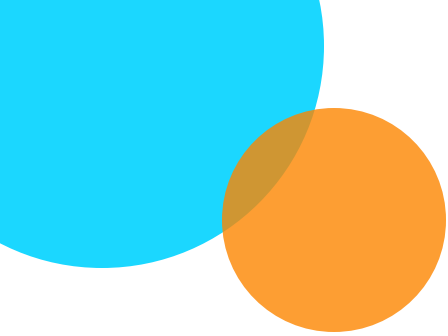
U.S. Adults' Self-Identification as LGBTQ+, by Generation, 2023

Figures are the percentage who consider themselves to be Lesbian; Gay; Bisexual; Transgender; or something other than heterosexual.



Based on aggregated data from 2023 Gallup telephone polls.

GALLUP



31%

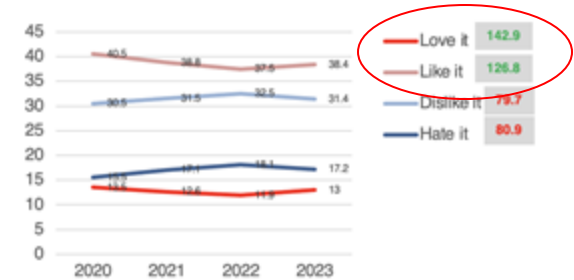
of Gen Z think
traditional gender
roles & labels are
outdated

And having the freedom to express it.

Because, they don't necessarily see
themselves in rigid terms.



How much do you like standing out in a crowd?



"I was looking to blend in when I first started...I wanted to just be an artist at first. I wanted to just make music. But now I have even more of a purpose to continue to find myself and, by doing so, help others find themselves."

Lil Nas X, Rapper & Pop Star

They're the Social Generation

Born with cellphones in their hands and access to **unprecedented content** it has shaped their view of the world and feelings towards it. Making them a very **discerning** bunch.

Learning from social by being social:



"Social media has become a point of discovery for everything — for interests, for influencers, for news."

Ziah Ahmed, CEO, JUV Consulting

Visual social wins in their world:

US Time Spent on Social Media Platforms, by Age, 2023

hrs:mins	Facebook	Instagram	Snapchat	TikTok
18-24	0:12	0:38	0:30	0:58
25-34	0:21	0:27	0:16	0:27
35-44	0:23	0:16	0:07	0:18
45-54	0:24	0:10	0:03	0:07
55-64	0:25	0:06	0:01	0:05
65+	0:14	0:02	0:00	0:02
Total	0:20	0:15	0:08	0:17

Note: includes all time spent on each social network platform; includes usage via any device
Source: Insider Intelligence | eMarketer Forecast, Sep 2023

28/08/2023 Insider Intelligence | eMarketer

Use social to air
their pointed views:



Leaving chipotle after they
cheat me from the portions

They've Lived Through Chaos

They've spent less than three decades on the planet, and they've witnessed crisis after crisis. It's resulted in **anxiety**. But, so far, they **haven't given-up**.

Problems exist from global to local:


Climate change threatening 'things Americans value most,' U.S. report says



Pandemic stress weighs heavily on Gen Z, according to a new poll

 Concern about gun violence in American schools is on the rise, new poll shows



Gen Z is Off to a Strong Start as the New Cursed Generation

It's not all doom and gloom:

76% of Gen Z said
“they have a great future ahead of them.”

Have a strong sense of the their own reality:

“Millennials in the mid-2010s used words like ‘diverse,’ ‘free,’ and ‘land of abundance’ to describe the U.S. A few years later, Gen Z’ers instead said ‘dystopian,’ ‘broken,’ and ‘a bloody mess.’”

Jean M. Twenge, PhD

They've Seen Institutions Fail Them

Their diversity, knowledge, and experience has resulted in continued declining trust in the institutions designed to protect and help them.

The establishment appears to be failing Gen Z again and again:

NBC NEWS

'I can't breathe':
Man dies after
pleading with
officer attempting
to detain him in
Minneapolis

The Washington Post



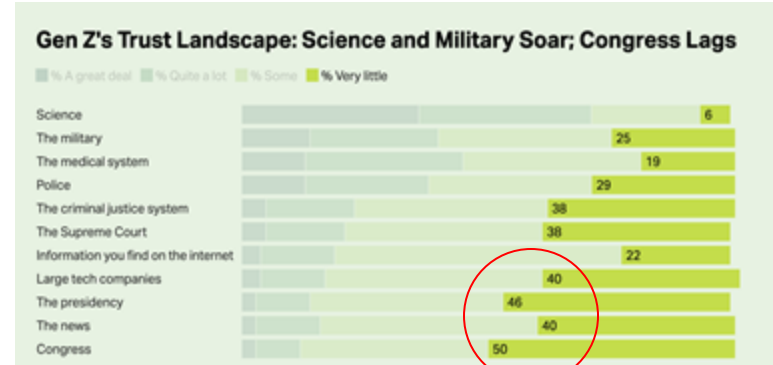
Target pulls some LGBT+ items days after
CEO talks up inclusivity

The New York Times



In 6-to-3 Ruling, Supreme Court
Ends Nearly 50 Years of Abortion
Rights

And their disappointment in the establishment is clear:



Only They Have The Answers to Fix Things

They've got the temperament and means to do so. They will call-out brands, businesses, and institutions who miss the mark. And are willing to take action.

Gen Z is expert at airing their views on the right channels and platforms:

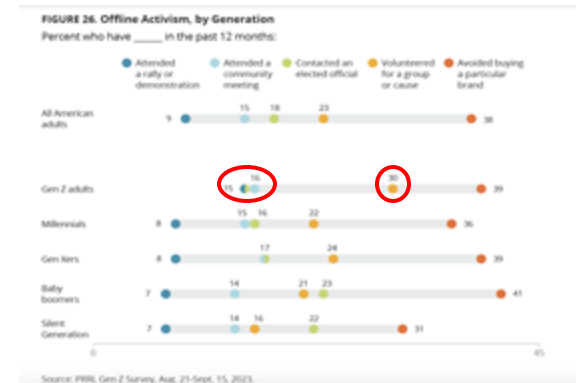


[Betsy Watson](#)



[Kahlil Greene](#)

For Gen Z it is about turning-up in person too:



They're Not Scared of the Future

They may be anxious but Gen Z is planning for the future. Immediacy and action matter to them. They not going to wait around for the usual solutions.

They have self-belief:

82% BELIEVE
they will achieve their goals.

They're stepping up to the plate:



Representative Maxwell Alejandro Frost

Gen Z are **82 million people**, who will drive unprecedented change.
They're already worldly because of their digital existence.
Their knowledge of the world is sophisticated.
And their expectations are high.
The status quo won't do.

Gen Z are **82 million people**, who will drive unprecedented change.
They're already worldly because of their digital existence.
Their knowledge of the world is sophisticated.
And their expectations are high.
The status quo won't do.

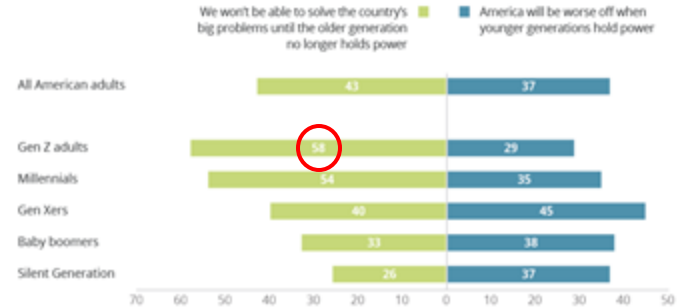


Gen Z will be watching Trump and Biden debate. Will the old guys say the right things?

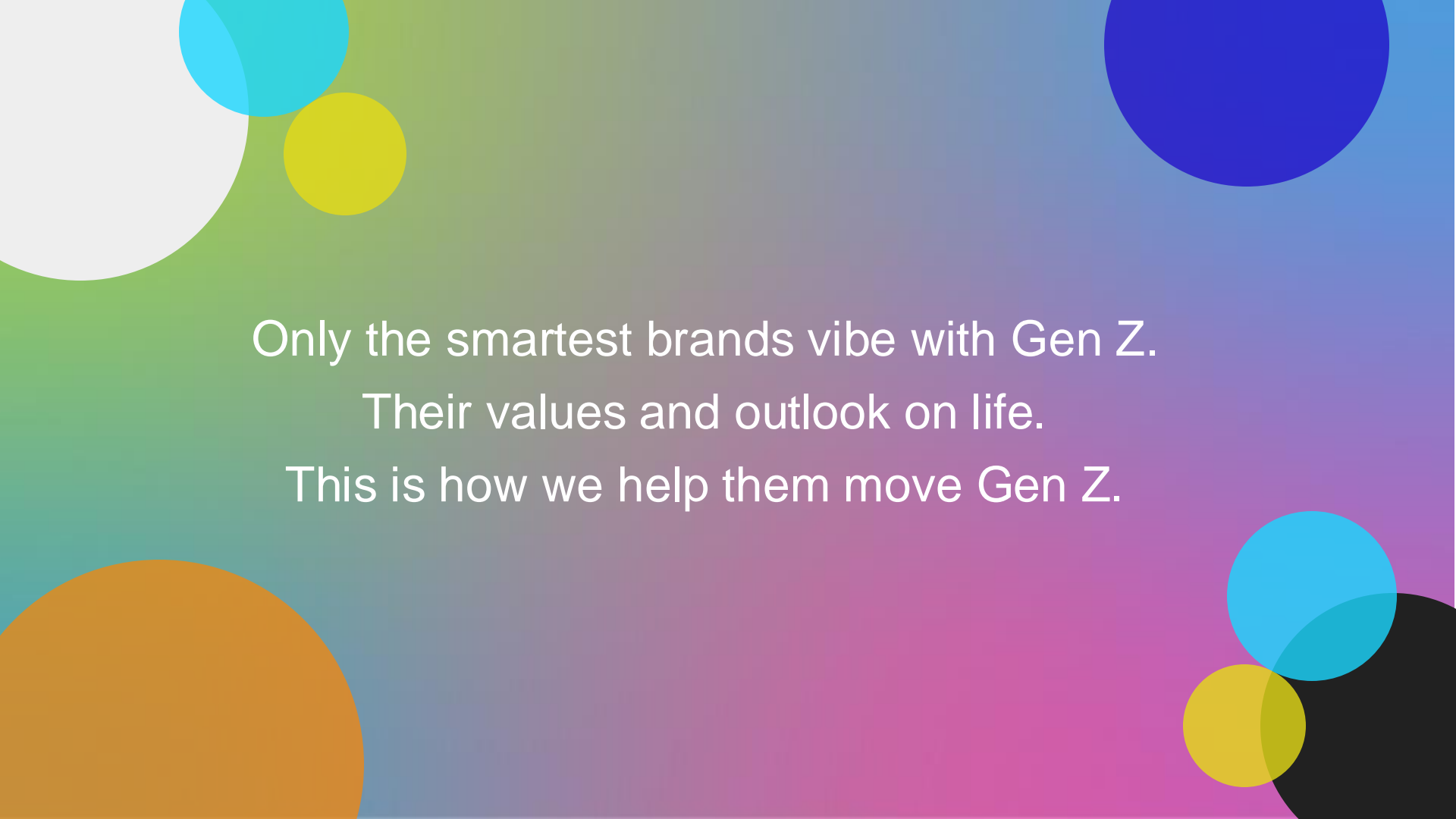
What do Gen Z voters care about? I'm giving Donald Trump and Joe Biden a quick lesson on that.

Gen Z is ambitious,
adventurous and rebellious
compared to the U.S. general
population. (136 / 125 / 155)

FIGURE 10. Views on the Future, by Generation
Percent who agree that:



Source: PRRI, Gen Z Survey, Aug. 21-Sept. 15, 2023.



Only the smartest brands vibe with Gen Z.
Their values and outlook on life.
This is how we help them move Gen Z.

We move Gen Z ...

by showing we get them, their humor,
and their strange appetite for the 90s.

Twix

2023

When Life Under Delivers

Through the eye-catching use of quirky visual humor Twix shows an uncanny appreciation of Gen Z's temperament when exploring their identity and if things don't quite go to plan. While our adventurous hero is crestfallen, Twix is there for the times when life doesn't quite live up to expectations.

Takeaway: Gen Z is self-aware enough to enjoy being parodied as much as anyone.



We move Gen Z ...

by showing them respect, because
that's what they're yearning for as
they enter adulthood.

McDonald's

2023

An American Story

Recognizing the educational achievements of the young Latino community is serious business when they live in a world that puts so many barriers in their way. This work shows them the respect they deserve for their commitment and willingness to share what they learn.

Takeaway: Don't talk about what the brand has done. Show the brand as an enabler.



We move Gen Z ...

by showing that we get that when they're
deep in something, nothing else exists.
Not even hunger.

Heinz

2023

Target Your Hunger

Gen Z love gaming. They love hacks. They play games for hours and hours. This experience provides Gen Z gamers with a meaningful hack that gives them a new appreciation for the household brand.

Takeaway: Don't just meet Gen Z where they are, turn up in their world and do something that will get them talking.



We move Gen Z ...

by showing we know what they love,
and how to take it to the next level to
get them to become more avid fans.

Starburst

2022

Ask The Universe

This work recognizes Gen Z's fascination with space. It takes a simple hobby and takes it to the next level through adjacent social activities that creates a community of fans committed to answering the universe's biggest questions.

Takeaway: Use the product to celebrate the audience and their interests. Create a world they can enjoy being themselves in.



We move Gen Z ...

by recognizing that the true picture
is exactly what they want to see.

U.S. Army

2021

Be All You Can Be

At a time of massive political, social, and economic upheaval, The U.S. Army needed to overcome Gen Z' disinterest in military service. Understanding this is an audience who can't have the wool pulled over their eyes they demonstrated how service is grounded in "real" passion and purpose.

Takeaway: When authenticity is key, brands must never hold back. Gen Z will always appreciate candor and honesty.



Going forward, how do we **move**
Gen Z so they engage with brands in
a rapidly changing world?

Move Gen Z...

Acknowledge their identity matters.

They don't define themselves using tick boxes. It's a multi-layered and complex situation. They express themselves **intentionally**, IRL, virtually, and from platform to platform.



78% of Gen Z in the US say they should have the ability to define their own identities, without having to subscribe to societal labels.



Half of adults ages 18 to 29

say someone can be a man or a woman even if that differs from the sex they were assigned at birth.

And half of adults under 30,

go on to say government documents should offer options other than 'male' and 'female'.

Move Gen Z...

**Understand they do respect institutions.
Usually, the ones closest to them.**

For Gen Z familiarity doesn't breed contempt. They trust their parents and family. Seeing what they've been through first-hand has helped Gen Z wise up earlier in life.

89%

of Gen Z teens trust
their parents' advice.

7 out of 10

of Gen Zers ask their parents to help
them find a job.

8 in 10

Gen Zers who found a job using
parents' help attribute their success
to parental guidance.

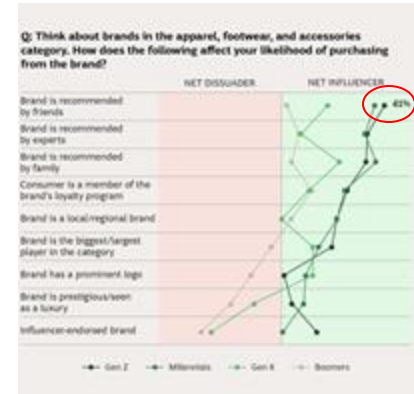
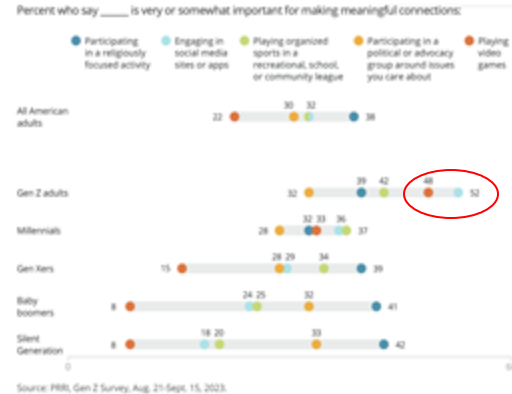
Move Gen Z...

**Dance to the beat of their drum.
Not yours.**

Gen Z expect and want credible and authentic options. They look to their peers to help find it. Their communities are their lifeline for news, friendship, entertainment and allyship.

92% of Gen Z

indicated that being authentic and true to oneself is extremely or very important.



Move Gen Z...

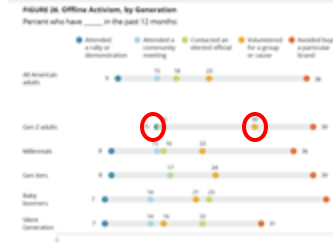
Know they'll flex their muscles.

Gen Z know they are a valuable commodity. They have leverage and will use it. Because, they know if brands don't evolve to reflect their needs, they'll fail and die.



How Abercrombie went from America's most hated retailer to a Gen Z favorite.

Abercrombie & Fitch was the top performing stock of 2023. But it's nothing like the 90s mall brand you remember.



Gen Z Voted at a Higher Rate in Its First Midterm Election than Previous Generations Did at that Age

The voter turnout in midterm elections of each generation (defined by birth years below) in the 1st, 2nd, 3rd, etc., election in which the entire age 18-24 cohort was eligible made up by members of each generation.

- Baby Boomers (born 1946-1964)
- Gen X (born 1965-1980)
| ■ Millennials (born 1981-1996) |
| ■ Gen Z (born 1997-2012) |



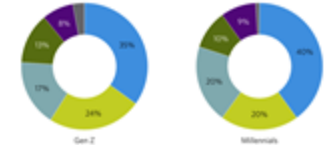
Note: The first midterm election in which Baby Boomers made up the age 18-24 cohort was 1970; data is available starting in 1970.

CIRCLE © Tufts University, Tisch College, CIRCLE
Source: CIRCLE analysis of the Census Current Population Survey Voting and Registration Supplements, 1970-2022

Gen Z Believes Voting is a Responsibility and Wants to Shape Election Outcomes

The percentage of youth from each generation who cited each as their primary reason for voting:

- Voting is my responsibility
- My vote can affect the outcome
- Voting is a right
- I want to express my support for my candidate
- I want to express my opposition for the other candidates
- I want to "shake things up"



Move Gen Z...

Understand they live life in snippets.

Gen Z is not distracted. They're masters of handling multiple stories across multiple screens and platforms. They edit out what isn't important to them and devour what is.



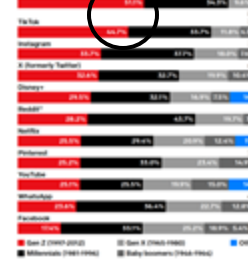
"No one wants to see real life; they want to see highlight reels."

Charli D'Amelio, TikTok Star & Influencer

Percentage of U.S. adults who regularly get news from TikTok by age group



Share of Total US Users on Select Digital Platforms, by Generation, 2023



US Time Spent on Social Media Platforms, by Age, 2023

hrs:mins	Facebook	Instagram	Snapchat	TikTok
18-24	0:12	0:38	0:50	0:58
25-34	0:21	0:27	0:14	0:27
35-44	0:23	0:16	0:07	0:18
45-54	0:24	0:10	0:03	0:07
55-64	0:25	0:06	0:01	0:05
65+	0:14	0:02	0:00	0:02
Total	0:20	0:15	0:08	0:17

Note: Includes all time spent on each social network platform; includes usage via any device
Source: Insider Intelligence | eMarketer Forecast, Sep 2023

Gen Z Non-Negotiables

To move Gen Z successfully, brands must demonstrate they understand how they **think, feel and act.**

M
O
V
E

Acknowledge their
identity matters.

Accept all
institutions aren't
the same.

Dance to the beat
of their drum.
Not yours.

Appreciate they
will flex their
muscles.

Get that they live
their life in
snippets.

Gen Z Non-Negotiables

This means having to rethink the traditional ways of reaching and engaging this audience. By living in Gen Z's world, not theirs...

M
O
V
E

Acknowledge their
identity matters.

Accept all
institutions aren't
the same.

Dance to the beat
of their drum.
Not yours.

Appreciate they
will flex their
muscles.

Get that they live
their life in
snippets.



A
C
T

Display empathy.
Be a magnet not
a mirror.

Move beyond
the traditional
the same way
they have.

Meet them more
than halfway.

Support their
activist spirit.

Capture their
attention and give
the feels.

What Does This Mean for the 2030 Census?

- Is it better to market the 2030 Census as a brand or an action to Gen Z?
- What emotion will most effectively prompt Gen Z to respond to the census?
- How can the U.S. Census Bureau gain Gen Z' trust at a time of ongoing cynicism in the establishment?
- How does the 2030 Census show it drives immediate change for the better?
- What is the singular benefit for Gen Z in participating in 2030 Census?

Thank You