



GEN Z IN THE NEW NORMAL

SEPTEMBER 2020



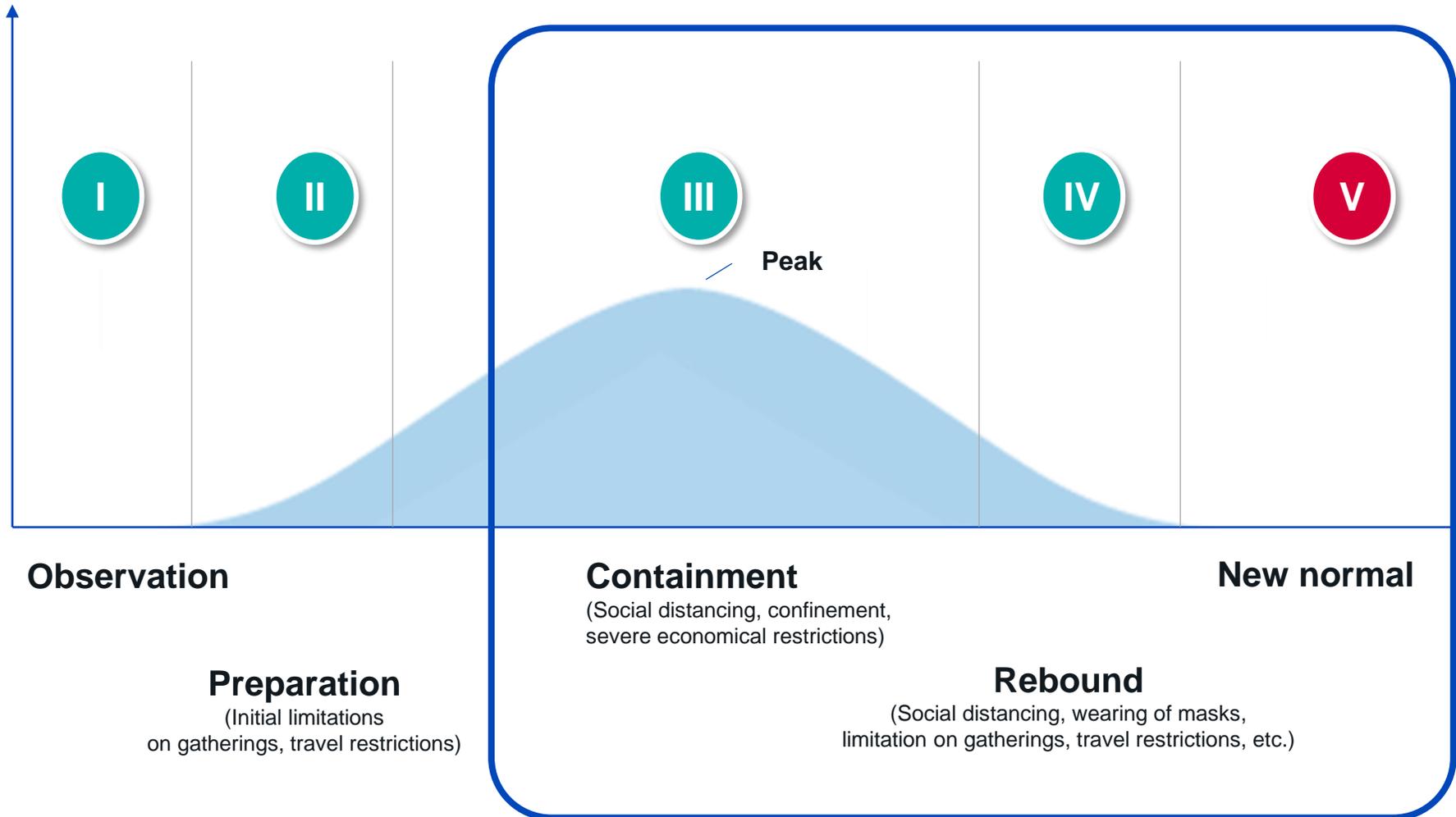
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5 MAJOR PHASES OF IMPACT IN THE COVID-19 EPIDEMIC

of cases

Generally observed phases of protective measures



« The greatest danger in times of turbulence is not the turbulence itself, but to act with yesterday's logic » Managing in turbulent times, Peter F. Drucker.

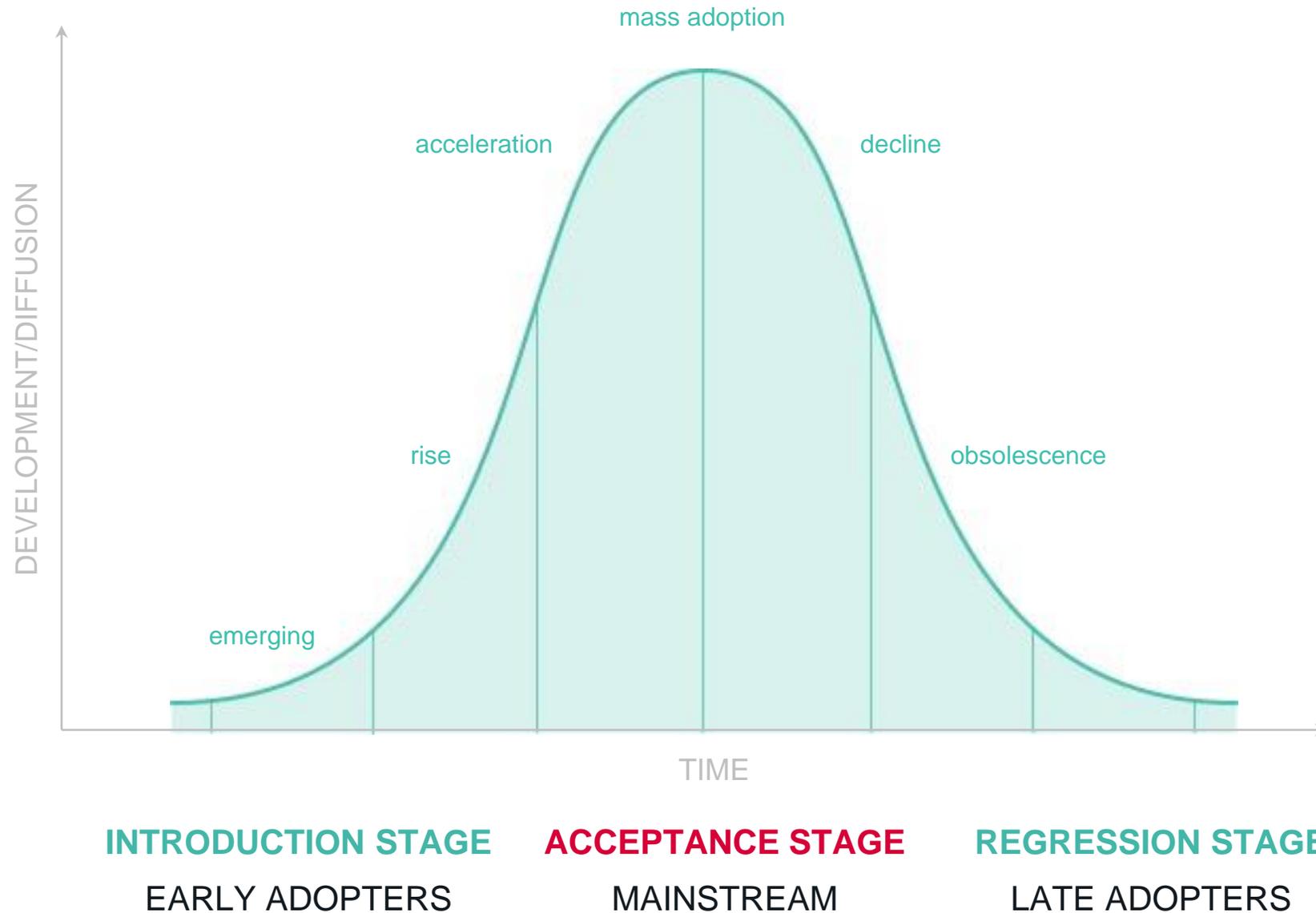
Time since outbreak

WHAT IS THE NEW NORMAL?

- The New Normal will be different than the World 1.0. **There is no going back to « normal »** as this global pandemic is and has already shifted our perceptions and behaviors
- Dramatic restructuring of the economic and social order in which business and society have traditionally operated. There **might still be constraints and adjustments** in the New Normal but they will be the new norm.
- An **opportunity to learn from a plethora of social innovations and experiments**, ranging from working from home to large-scale surveillance.
- An **understanding of which innovations**, if adopted permanently, **might provide substantial uplift** to economic and social welfare.



COVID CRISIS – AN ACCELERATOR OF ADOPTION



CONTENTS

01 GENERATION RECAP

Mindset, values and paradoxes

02 IMPACT OF COVID ON GEN Z

Impact on Trends & Megatrends

03 GEN Z IN THE NEW NORMAL

Behaviors and aspirations, social media, relation to brands and consumption

04 CONVIALITY IN THE NEW NORMAL FOR THIS GENERATION

People, Places and Moments

05 RELATION TO ALCOHOL IN THE NEW NORMAL

06 IMPLICATIONS FOR PERNOD RICARD

KEY QUESTIONS

- What has been **the impact of Covid** on this generation ?
- Will this year fundamentally **change their core identity** ?
- What will be **their aspirations** in the New Normal? What will be **their priorities** ?
- How has this year **changed their relations** to brands ?
What will they expect from them in the New Normal ?
- Has the pandemic changed **their relation to alcohol** ?
- How will they consume and relate to alcohol in the New Normal ?
- What will they expect from alcohol brands ?
- How will Conscious Hedonism evolve ?
- What will happen to Virtual Togetherness vs Real Life Social Networks ?
- How will they **socialize and be convivial** in the New Normal ?

OUTPUTS



Drivers of change
Shifts in convivial occasions



New values
New moments
New places
New experiences
New aspirations
New communities



Impact on industry
New opportunities
Best practice examples
New rules of engagement
Recommendations

KEY TAKE OUTS

GEN Z IN THE NEW NORMAL

- Gen Z was already a unique and resilient generation. The pandemic and more globally the highly challenging year of 2020 was not a shock to their system per se.
- The multiples crisis solidified several of this generation's key drivers : their quest for self actualization, their purpose driven mindset, their faith in peer-to-peer and lack of trust for institutions and older generations.
- In an unstable era to come, Gen Z will be focused on building stability and future proofing their lives but a more hedonistic approach to life could be on the horizon for a Generation that has always been mature and eager to reach adulthood.
- Looking for a more balanced lifestyle they'll invest even more in self care and the right to let go of the “ always on” mindset.
- This attitude won't be applied to their quest for information and justice as they'll increasingly be looking for ways to be changemakers. Their intense quest will lead to polarization within this generation who is not a monolith and will be intensely more divided on certain topics.

THEIR RELATION TO BRANDS

- They will be increasingly demanding when it comes to brands commitment to the causes they care about. Looking beyond communication efforts they will be looking behind the scenes and scrutinizing corporate culture, supply chain practices and diversity efforts. Ever growingly vocal the use of social media to expose brands not acting accordingly to their values will be part of their New Normal.
- Socio-political consumption won't be a short-term trend for Gen Z
- Their mindful consumption will expand, with a focus on supporting local and community-based brands and retailers. In the same vein they'll expect more cultural relevancy from brands wishing to talk to them.

KEY TAKE OUTS

THEIR RELATION TO ALCOHOL

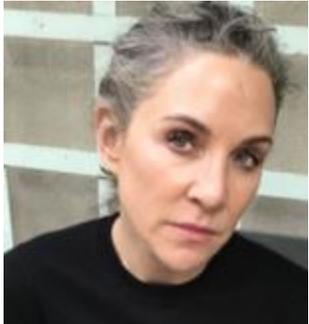
- The time spent on self actualization during the lockdown, was also applied to alcohol. A new relation to drinks based on discovery and experimentation might be in the making for this cohort. This new interest for drinks is linked to their need to express their creativity.
- A high emphasis on health and well being during lockdown for this cohort, will lead them to make more conscious and valuable decisions when it comes to drinking.
- Looking for more qualitative and to some extent premium options for their drinking occasions they will be willing to invest more in alcohol.

CONVIVIALITY IN THE NEW NORMAL

- While real life conviviality will be their main way of socializing in the short and middle term, virtual togetherness won't go anywhere for this digital native cohort.
- At-home consumption is bound to expand among them both for financial reasons but also because their homebody lifestyle has been accentuated by the crisis.
- Their purpose driven characteristics will transfer into nightlife. They will create a myriad of small collectives and identity driven events and rely on themselves and a DIY approach to create convivial moments.
- Likewise their newfound support for local will translate into conviviality with a growing desire to support local scenes. In the same vein small events and more intimate setting could be their preferred way to celebrate.
- Finally, they will merge self actualization and conviviality looking for more fulfilling and learning moments.

A DESK RESEARCH COMPLIMENTED BY INTERVIEWS WITH EXPERTS AND AVANT-GARDE CONSUMERS THROUGHOUT THE WORLD

EXPERTS



Molly Logan, Founder of Irregular Labs, a global Gen Z learning network and innovation lab.



Holly Friend, Senior Foresight Writer, The Future Laboratory –Youth Expert



Richard Cope –Senior Trends Consultant at Mintel



Balogun Aube, Event Operation Director @Boiler Room



Tom Wiltshire, VP Special Projects @Boiler Room



Zoe Michel, Editor-In-Chief of MAD Media, a 100% social media platform catering to Gen Z



Eunhae So, Freelancer, former event coordinator @Cakeshop club in Seoul

TREND MAKERS GEN Z

CHINA

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INDIA

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US

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FRANCE

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IRREGULAR LABS



Irregular Labs is a Learning Network and Innovation Lab that builds, manages, and activates a global system of Micro-Communities so clients can connect and create with Gen Z.



▶ PLAY



▶ PLAY

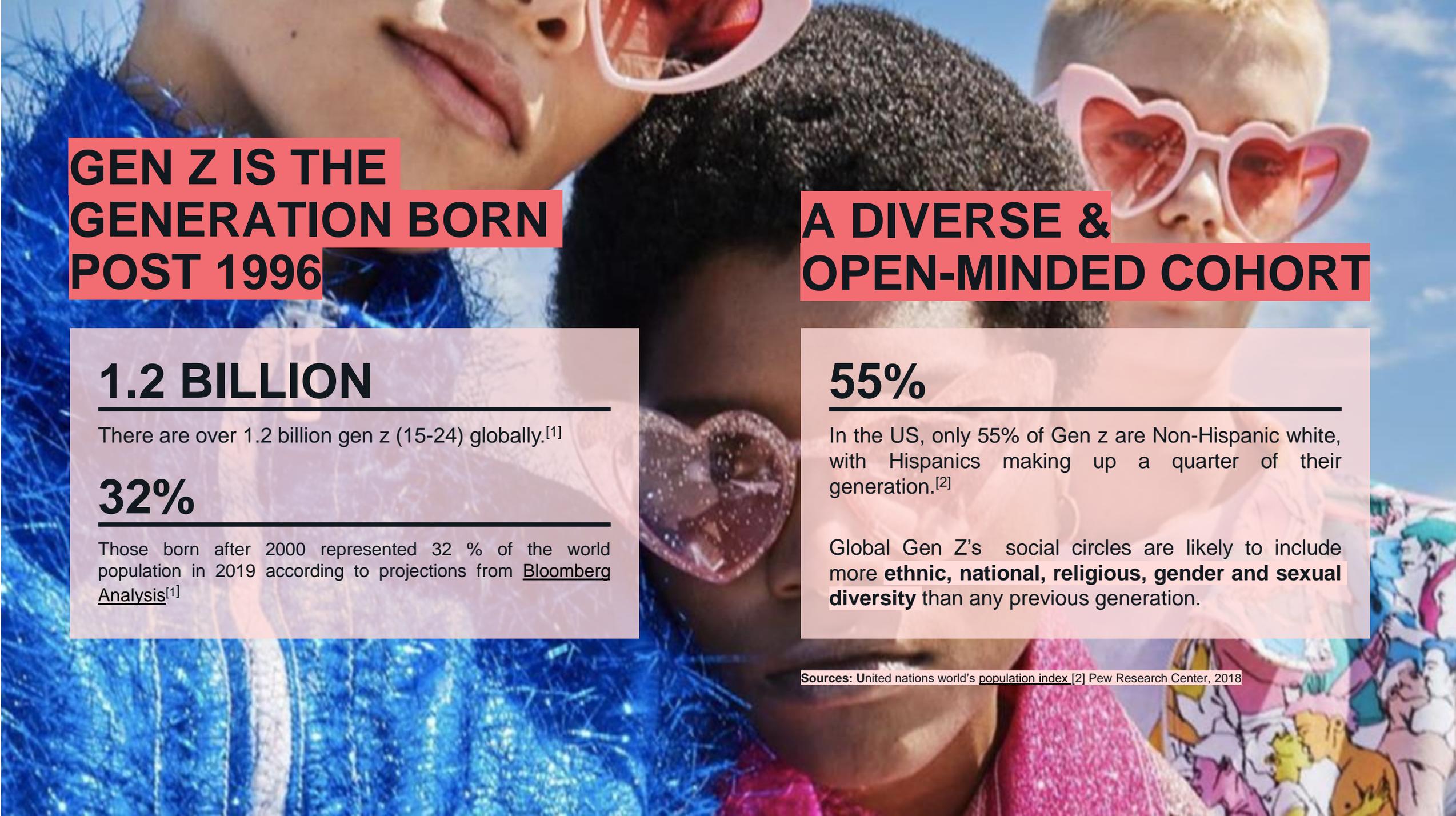
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PART 01

GENERATION RECAP

What we already know about Gen Z
Mindset, values, & paradoxes



GEN Z IS THE GENERATION BORN POST 1996

1.2 BILLION

There are over 1.2 billion gen z (15-24) globally.^[1]

32%

Those born after 2000 represented 32 % of the world population in 2019 according to projections from [Bloomberg Analysis](#)^[1]

A DIVERSE & OPEN-MINDED COHORT

55%

In the US, only 55% of Gen z are Non-Hispanic white, with Hispanics making up a quarter of their generation.^[2]

Global Gen Z's social circles are likely to include more **ethnic, national, religious, gender and sexual diversity** than any previous generation.

Sources: United nations world's population index [2] Pew Research Center, 2018

GEN Z AROUND THE WORLD

US

They comprise 22 % of the total US population or approximately 67 million individuals.

40% of this generation are still teenagers

By 2026, Gen Z is estimated to become the largest U.S. consumer population.

SOUTH AFRICA

In 2019, Gen Z (born 1995 - 2009) represented 15 million of individuals.^[11]

Gen Z aged 18-24, encompasses 6 millions people. (10% of population)^[12]

NIGERIA

There were roughly 40 million people from 15-24 y/o in Nigeria in 2018, accounting for 20% of the population^[15]

BRAZIL

In 2018, Gen Z (born 1995 - 2010) represented 42 million members (20% of the population).^[9]

According to J. Walter Thompson in 2015, their annual spending power: reached over \$35 billion.^[10]

EUROPE

- **France:** In 2018, Gen Z, aged 19-25, comprised 5.1 million.^[2]; in 2019, Gen Z, aged 15-24, comprised 11,8% of population.^[3] 7.9 millions.
- **UK:** In 2016, Gen Z composed 19% of the population.^[4] In 2019, Gen Z (ages 15-24) comprised 7.8 millions individuals.^[5]
- **Germany:** In 2018, Gen Z (ages 15-24) comprised 8.6 millions people.^[6] 10.4% of the population.

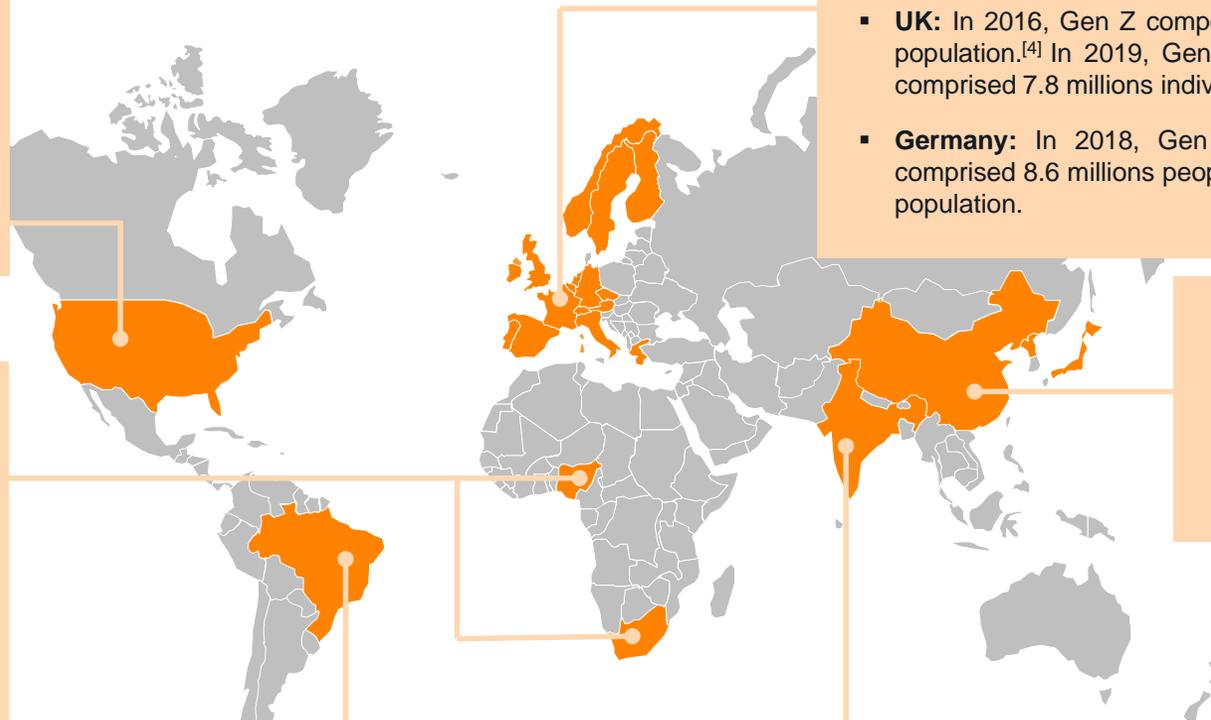
CHINA

In 2018, Gen Z (aged 15-23) represented 149 million people and were set to account for 40% of global Gen-Z purchases by 2020.^[13]

INDIA

India is home to the largest Gen Z in the world.

In 2019, (according to Bloomberg's analysis in 2018) India's Gen Z (16 to 24) population reached 472 million)^[8]



Sources:

- [1] US Census Bureau, *Packaged Facts*
- [2] Number of Millennials within the French population in 2018, by age group Published by Statista Research Department, Jun 16,
- [3] Distribution of the population by age group in France in 2020
- [4] Trajectory Trends Breakfast, 2016
- [5] Population of the UK 2019, by age group Published by Daniel Clark, Jul 2, 2020
- [6] Population of Germany as of December 31, 2018, by age group
- [8] Gen Z Is Set to Outnumber Millennials Within a Year
- [9] 'True Gen': Generation Z and its implications for companies, Mackinsey&Company, 2018.
- [10] Generation Z – Brazil, Wunderman Thompson, 2015
- [11] HDI Youth Consultancy
- [12] The TransUnion study
- [13] Gen Z Spending Power White Paper, KANTAR & Tencent.
- [14] <https://mp.weixin.qq.com/s/8Eingz2cK0-DXzMUHXvsA>
- [15] *IndexMundi*, 2018

DIGITAL NATIVES & DIGITAL SAVVY

AS THE FIRST TRULY DIGITAL GENERATION, GEN ZERS HAVE NEVER EXPERIENCED A WORLD WITHOUT A SMARTPHONE OR SOCIAL MEDIA.

“

For older generations, you experience your life and use your phone to capture and share it, for Gen Z, they experience life through their phones.”

Christine Song? Senior Connections Planner, Media, R/GA Los Angeles

Spending their lives online Gen Z has greatly contributed to the expansion of the ever-evolving Internet culture.

Gen Z is the ultimate master of these tools and knows how to make the most of these them by using them in a purposeful way with a clear editorial line.

Nevertheless their hyper connectivity doesn't distract them from being aware of the pitfalls of social medias (desocialization, loneliness, cyber bullying).

INDIVIDUALITY IS KEY

EXPRESSING THEIR UNIQUE SELVES AND EMBRACING WHAT MAKES THEM STAND OUT IS A KEY DRIVER FOR THIS COHORT.

Uniqueness is a priority for Gen Z.

There is more emphasis during adolescence on creating their own path, whether that means building new educational systems or their own personal brands.

Gen Z wants to reframe outdated social constructs and create new ones.

They sway towards brands that celebrate self-expression and empowerment. They don't want brands that cater to everyone, they want brands that cater to them individually

AUTHENTICITY IS THEIR MOTTO

LIVING THEIR FORMATIVE YEARS AMID FAKE NEWS PROLIFERATION, THESE CHILDREN OF SOCIAL MEDIA HAVE MADE THE QUEST FOR (THEIR) TRUTH THEIR ULTIMATE GOAL.

65%

Of young people interviewed agreed that authenticity was one of their top values, and what makes a person cool is staying true to their selves.^[1]

Being true to themselves is essential for this generation who has become expert in detecting fakeness.

They've extended this principle to others and specifically brands. They have developed a sixth sense for fake “woke” marketing and expect transparency and geniuses from them.

BRANDED ME

VISUAL AND COMMUNICATION EXPERTS, GEN Z KNOWS HOW TO PRESENT ITSELF TO THE WORLD AND WHILE THEY GO ABOUT IT IN DIFFERENT WAYS, RECLAIMING VANITY IS PART OF THIS GENERATION'S DNA.



Generation Z are reclaiming vanity as a positive trait.

Some of them are choosing to caricature themselves in the ultimate act of self-acceptance.

This attitude is closely linked with Generation Z's cynical nature. As part of their memeification of everything, they are turning the microscope on themselves.

We've seen this Western cynicism embodied by finstas, in which teenagers view accounts with hundreds of followers as fake, while a repurposed version, kept for a select few, is the real one.

29,5%

Of UK youth has both a private and a public account.^[1]

On the opposite side, another part of Gen z is crafting a more refined and perfect version of themselves online that is playing on a more conventional ideals of success, money and beauty.

SELF TAUGHT

A THIRST FOR KNOWLEDGE IS DRIVING THIS GENERATION IN THEIR QUEST OF SELF ACTUALIZATION BUT THEY ARE DOING SO WITHOUT RELYING ON TRADITIONAL EDUCATIONAL TOOLS.



75%

Of US teens say there are ways of getting a good education other than by going to college.^[2]

For Gen Z, knowledge learnt in the real world is more relevant, more useful and often, more accessible.

Gen Z are drawn to people or institutions that can speak honestly, from first-hand experience. They are a generation that seeks to amplify previously silenced voices.

PURPOSE DRIVEN

GEN Z IS FUNDAMENTALLY A PROGRESSIVE COHORT ACTIVELY WORKING ON BUILDING A FAIRER WORLD. REAL LIFE ACTIVISTS OR SOCIAL MEDIA SHARERS THEY MOBILIZE INSTINCTIVELY TO AFFECT CHANGE.



76%

Of UK and US Gen Z readers of Vice identify as activists.^[3]

At 24%

UK Gen Z cites Ethics and Politics as the number one factor making a brand great.^[4]

Gen Z has been known for being strong advocate of **inclusivity & diversity, sustainability** and mental health and they are expecting brands to be aligned with these concerns and take action.

PRAGMATIC PLANNERS

FINANCIALLY CONSERVATIVE GEN Z IS LOOKING FOR STABILITY AND AIMING TO ACHIEVE LONG TERM OBJECTIVES. THIS PRAGMATIC COHORT TAKES CONCRETE STEPS TO REACH THEIR SET GOALS.

“

In a post recession era, Gen Z is very different, they are incredibly debt-averse, and it's because they have a more open relationship with their parents; those money conversations happen sooner.”

Rachel Mercer, Executive Strategy Director, R/GA an international innovation consultancy

“

Gen Z are creating long-term financial goals like retirement and a better life.”

Saulo Rodrigues, VP, Executive Creative Director, R/GA São Paulo

88%

Of APAC Gen Z say it's important to start saving for their future now. [1]

57%

For 57% of French youth (15-24 Y/O) money is the most motivational factor to work. [2]

CONTROL OBESESSED

GEN Z LIVES ON THE INTERNET BUT BECAUSE IT HAS UNDERSTOOD ITS PITFALLS, IT'S A GENERATION THAT WANTS TO HAVE TOTAL CONTROL OVER THEIR LIVES, THE WAY THEY ARE PERCEIVED BY OTHERS AND THEIR DESTINY.

70%

In the UK at least,— more than 70% think binge drinking is very risky. [3]

49%

Of UK Gen Z claim their online image is always at the back of their mind when they go out socializing and drinking. [4]

76%

Think it is important to be in control of all aspects of their life at all times. [4]

This incessant need for control burdens this generation with heavy pressure which is seen through the higher levels of anxiety and mental health issues this generation declares experiencing.

CREATIVITY HUNGRY

CREATIVITY IS PERCEIVED AS THE ULTIMATE TOOL TO EXPRESS THEIR INDIVIDUALITY, CULTURAL RELEVANCY AND FOR SOME A WAY TO MAKE A LIVING. FOR THIS GENERATION ADEPT OF CULTURAL HYBRIDATION, CREATIVITY HAS BECOME SECOND NATURE

In a Snapchat x JWT report this cohort has been labelled “the next generation of super creatives”.

“

Their creative arsenal—face swaps, selfies, AR Lenses, lip syncing, and emojis—has become the expressive staple of the digital arena, and now this group is using video, sound, animation and more to create rich new visual landscapes, lobby for their favorite causes, and create new income streams.”

Into Z Future, 2019, JWT Intelligence x Snapchat

70%

Of global Gen Z describe themselves as creative (vs 50% of the control). [5]

63%

State doing something creative every day compared to 57 among other generations [6]

Sources: [1] Wunderman Thompson Intelligence, Generation Z: APAC [2] Mazars x Opinion Way, 2018 [3] Ipsos Mori, Generation Z – Beyond Binary, 2018 [4] Opinium Research x with Red Brick Road, 2019 [5] Boiler Room Brand Labs, You Don't Know Gen Z, Survey 5K respondents, 2019 [6] Gen Create; Adobe x Harris Poll, 2020

PEER-TO-PEER BELIEVERS

NOT RELYING ON TRADITIONAL AUTHORITY AND IRRELEVANT TO ICONS, GEN Z BELIEVES IN EQUAL PARTNERSHIP AND COMMUNITY-BASED INTERACTIONS.

When it comes to determining what is the hype, they're looking to each other primarily, and not to the traditional tastemakers (celebrities) or gatekeepers (media brands).

61%

Of US shoppers aged 10 to 17 say they're "most influenced" by friends' opinions for purchase decisions.^[1]

The same mentality applies to established institutions and traditional authorities who are being challenged around the world by a Gen Z eager to build a world more aligned with their values.

75%

Of Brazilian and Nigerian youth said they believed politicians didn't care about people like them.^[2]

HOLISTICAL HEALTH SEEKERS

WHILE DRINKING LESS THAN THEIR OLDER COUNTERPARTS GEN Z HAS OFTEN BEEN MISLABELED AS THE « SOBER » GENERATION, GEN Z IS HOWEVER INVESTED IN THEIR LONG-TERM HEALTH BE IT MENTAL OR PHYSICAL.

66%

While 66% of Gen Z report drinking regularly (vs 26% of the control) Gen Z is trying to consume with moderation and in a "clean" way.^[3]

68%-61%

Of US, UK, Australia and New Zealand Gen Z think that maintaining a well-balanced diet is critical and 61% think exercising is a major concern.^[4]

Mental health is an essential pillar of their holistic wellbeing.

83%

Of Gen Z feel that mental health is just an important consideration as their physical health (vs 47% of Gen Y/X).^[5]

A topic gaining more grounds among Gen Z worldwide, with pop culture relaying the message. The US and the UK leading the way in smashing the taboo around the subject.

FLUIDITY ADVOCATES

IDENTITIES NOT BEING FIXED AND ASSIGNED AT BIRTH IS A BIG BELIEF OF GEN Z WHO DEFINES ITSELF AS FLUID AND NON-CONFORMING THIS FLUIDITY DOESN'T JUST APPLY TO SEXUAL ORIENTATION OR GENDER, BUT ALSO TO THEIR WIDER INTERESTS.

36%

Of Gen Z declares seeing their identity as fluid.^[6]

In Asia, Gen Z is actively rejecting gender conforming identities, and this is leading to youth-driven social movements such as Japan's #WeToo and #KuToo Twitter campaigns, which advocate for equal gender opportunities.

80%

Of APAC Gen Z say gender doesn't define a person as much as it used to.^[7]

Sources: [1] eMarketer in R/GA's Generation Z, Non-Rebels With A Cause, 2019 [2] Ipsos, 2018 [3] Boiler Room Brand Labs, You Don't Know Gen Z, Survey 5K respondents, 2019 [4] The AdAge GenZ Marketing Playbook, AdAge Studio x unidays, 2019 [5] Opinium Research x with Red Brick Road, 2019 [6] Irregular Labs, Fluidity report, 2018, (2,013 respondents in 7 countries) [7] Wunderman Thompson Intelligence, Generation Z: APAC, 2020

GEN Z WANTS TO REACH ADULTHOOD FASTER THAN ANY OTHER GENERATION

IN CONTRAST TO MILLENNIALS, GEN Z ARE FAST TRACKING TOWARDS ADULTHOOD.

Gen Z, are desperate to grow up. While millennials were putting things off – delaying and rejecting traditional markers of adulthood – Gen Z can't wait to get it together. Of course 'being mature' has always been an aspiration for young people. But, while previous generations played at being 'grown ups', Gen Z are actively seeking out their own, new markers of adulthood. They're growing up their own way – fast.

Extremely self reliant, while they express skepticism towards the state of the world and traditional institutions, they believe in their own potential to affect change and take control of their own destiny.



**A GENERATION DEFINED
BY ITS PARADOXES**

GENERATION ME



VS

GENERATION WE



Stylish, social media-obsessed escapists Gen Me uses social media as a tool for personal brand building and to keep up with trends, influencers and brands.

More easily influenced and materialistic this trend following Gen Z is always on the hunt for newness and entertainment.

Even if deeply self centered it is not impermeable to it's "WE" sibling and keeps up with world issues and its generation causes without acting on them or changing dramatically their lifestyles to fix the problem.

Compassionate and vocal, Gen We can't be bothered to buy into buzz surrounding hype brands. Instead of following Instagram celebrities, they use social media to organize and meet like-minded activists.

This group is made up of change-makers unafraid to use their voice to advocate for causes they deem important, such as sustainability, equality and mental health.

63%

Of 16-24-year old volunteer at least once a year.^[1]

Generation Z sees itself in a global village: they come from all parts of the world and want to be both locally and globally rooted.

SUPER GLOBAL



With hyper access to worldwide content thanks to social media, Gen Z has built inspiration from around the world and increasingly living multicultural lives.

“

They're very used to consuming entertainment that has come from other parts of the world.”

MaryLeigh Bliss, chief content officer at YPulse, a research and marketing firm focused on Gen Z and millennials.

A prime example being the rise of Korean pop music. K-Pop band BTS, have taken their message of openness and fluidity across borders, out of South East Asia and to the top of the charts in the US and UK.

HYPER LOCAL



Buy Locally- Embedded in sustainability matters, Gen Z does its best to consumer better and buy local.

50%

Of China's Gen Z state always looking for locally sourced produce.^[1]

Made In Label- A growing local pride from Gen Z specifically in Asia leads to a cohort of consumers looking for brands and products “made In” locally, more able to reflect their cultures and aspirations.

50%

Of Gen Z in Vietnam favor brands that reflect Vietnamese values and cultures.^[2]

TRADITIONAL PRIORITIES



VS

UTTERLY PROGRESSIVE VALUES



Driven by hard work and success Gen Z cherishes highly the notions of family and stability.

44%

Of German Gen Zers aspire to own a home in the future vs 39% of millennials.^[1]

49%

Of US Gen Z save 25 percent or more of the income they earn or money they receive from their parents, eyeing big purchases like cars or homes, or simply preparing for a rainy day, some even save for retirement.^[2]

14%

The proportion of children aged 11-15 talking to either parent about something important has increased by 14 percentage points between 2002 and 2015.^[3]

Smashing taboos around identities, sexuality or mental health Gen Z has emerged as an utter progressive cohort, with various degrees of intensity depending on countries.

- Asian youths lead in challenging traditional perceptions of masculinity. In Korea, there are over 44k YouTube “male idol make-up” videos, mostly created by teenage boys.
- While feminism and LGBT equality have become popular liberal social norms, Gen Z keeps pushing social boundaries and with different levels of intensity around the world they are striving to create a radically inclusive world.

56%

Of US Gen Z know someone who uses non-gender-binary terms.^[4]

83%

of South Korean Gen Zers them already having negative connotations around marriage and 76% wanting no kids.^[6]

60%

Of 15-16 years old in the UK think sexuality is a scale and that it is possible to be somewhere in the middle.^[5]

PROUD HUSTLERS



VS

DEFIANT HOMEBODIES



As much as Gen Z wants to take control of their lives and be defined by their successes, they have been developing a growing sense of mistrust towards the establishment and capitalistic entities.

51%

Of Americans aged 18 to 29 have a positive view about socialism while only 45% have a positive view of capitalism. A 12-point decline in young adults' positive views of capitalism in just the past two years.^[4]

With a strong pressure to succeed and inspired by “self made” icons of their age such as Kylie Jenner or Kylian Mbappé, Gen Z has adopted an entrepreneurial mindset and feels empowered by digital to pursue multiple pathways, another testimony of the fluid essence of this generation.

55%

of US Gen Z feel that their generation is more entrepreneurial than previous generations.^[1]

Chinese social **community Xiaohongshu revealed that #entrepreneurship** was one of the most popular hashtags among young women under 20.^[2]

25%

Of French Gen Z aspire to be their own boss .^[3]

Challenging established **work culture and fast paced lifestyles, Gen Z is turning to a slower life focusing on spirituality and self care.**

87%

Of UK and US teens declare that taking care of their souls is important to them.^[2]

“

JOMO (joy of missing out) has never been more appealing for Generation Z, who are leading the homebody renaissance, spending more time than ever at home.”

Holly Friend in Generation Homebody, The Future Laboratory, 2019

For Gen Z, technology gives and takes in equal measure. It enables access to friends, information, and opportunities that previous generations *didn't* have, while leaving them vulnerable to tech-induced isolation, depression, peer pressure, and bullying.

ONLINE KINGS



VS

REAL LIFE LOVERS



56%

Of Western Gen Z is friends with someone they only know online.^[1]

58%

of Gen Z can't go more than 4 hours without Internet access before they become uncomfortable.^[1]

“

It's a place that makes them feel empowered and motivated, as well as a place for them to make real connections through direct messages, stories or reposting content.”

Amelia Rance, senior director of data strategy and analytics at marketing firm [Fullscreen](#).

Gen Z are increasingly aware of the negative consequences of social media. They recognize the power of real connection and actively seek out more IRL interactions to counter their online presence. It reflects a need for genuine connection and community-based interactions.

According to WGSN research, favorite weekend activities include eating out, going to friends' houses, or other intimate settings where teens can interact with each other and spend quality time.

24%

Of US 13–17-year-olds who report being almost constantly online say they socialize with their friends in person every day or almost every.^[2]

67%

Of Gen Z are shopping in-store most of the time.^[3]

CLAIMING UNIQUENESS



The core of Gen Z is the idea of manifesting individual identity. Consumption therefore becomes a means of self-expression—as opposed, for example, to buying or wearing brands to fit in with the norms of groups.

48%

Of US Gen Z shoppers want products tailor-made to their tastes and interests.^[1]

VS

CRAVING BELONGING



Gen Zers seek out new communities and subgroups,, for a greater sense of belonging. To do so, Gen Zers may have multiple digital personas that they dip in and out of to explore their interests and many me's.

66%

Of Brazil's Generation Z believe that communities are created by causes and interests, not by economic backgrounds or educational levels.^[2]

Oftentimes dubbed the lonely generation, this group is craving meaning and connection and find solace in belonging to micro communities. McKinsey & Company coined the term “communaholics,” to describe the phenomenon.

62%

A 2019 Spotify study found 62% of Gen Zers and millennials believe brands have the power to create communities based on common interests and passions.

BRANDS LOVERS



Driven by the need to project a successful sense of self, a part of Gen Z rely on premium brands to act as markers of achievement authority. Additionally, progressive brands or those with a unique twist offer the most social currency and Instagram potential and, therefore, win the most affection from Gen Z.

“

For lower to middle income 16-to 24 years-old, social currency is everything to this group. There's a lot of talk around this being an experience-first generation but we've found that this particular audience is different – they want to look good before stepping out into the world. Sending signals of wealth is important.”

Brett Booth, Partner at Nerds a UK youth and culture agency

In addition, Gen Z puts a lot of emphasis on brands as agents of change and expect them to be aligned with their values but also help them make a difference.

71%

Of US Gen Z believe that brands and corporations should help them achieve their personal goals and aspirations.^[1]

VS

BRANDS TROLLS



With an abundance of information at its fingertips, Generation Z are marketing savvy and great critics of brands marketing tactics. On top of being non loyal consumers a great amount of them are considered brand agnostic.

“

They're less brand-conscious and they are not spending as much as millennials do.”

Kyle Andrew, chief marketing officer of American Eagle Outfitters, in Fast Company.

They are becoming more cynical towards brands and won't hesitate to call them out and ask them for total transparency.

“

Many say they will not hesitate to lessen or end a consumer relationship when they disagree with a company's business practices, values or political leanings.”

Deloitte Global Millennial Survey 2019 (Millennials and Gen Z).

60 to 80%

Of APAC Gen Zers surveyed think that brands should be held to account for their actions.^[2]

76 to 81%

Of Brazilian Gen Zers will stop buying brands and spread the word about companies whose ads they view as macho, racist or homophobic.^[3]



PART 02

IMPACT OF COVID ON GEN Z

Megatrends & Drivers of change

CONNECTING GEN Z'S KEY DRIVERS TO OUR MEGATRENDS



INDIVIDUALISATION

- Fluid Identities
- Purpose Driven
- Self Taught
- Creativity Hungry
- Craving Belonging
- Individuality
- Authenticity
- Branded Me



HYPER-CONNECTIVITY

- Digital Natives
- Peer to Peer
- Hyper Global
- Hustle Culture



HEALTH & WELL-BEING

- Holistic Health
- Always in Control



SOCIAL POLARISATION

- Purpose Driven
- Radically Progressive
- Defiant Homebodies
- Brand Trolls



SUSTAINABILITY EMERGENCY

- Purpose Driven
- Defiant Homebodies
- Super Local

IMPACTS OF COVID ON GEN Z'S DRIVERS

COVID CRISIS



INDIVI-
DUALISATION



HYPER-
CONNECTIVITY



SOCIAL
POLARIZATION



HEALTH
& WELLBEING



SUSTAINABILITY
EMERGENCY





EXACERBATED INDIVIDUALIZATION

BEFORE COVID-19

People are keen to define **who they are and to be their 'best selves'**.

Advances in global education, health and technology **have helped empower individuals** as never before.

People increasingly want to be unique, achieve on their own terms, and follow their own paths to self-fulfillment.

“

They have used this opportunity to become these self-taught polymath. *Whether it's making their music or gaining new media skills there was a chance to take the leg up in their future careers and reinforce this DIY approach to education.*”

Holly Friend, Senior Foresight Writer, The Future Laboratory

COVID-19 CRISIS EFFECTS

SELF ACTUALIZING MORE THAN EVER

34%

Of US Gen Z turned to online learning unrelated to school. [1]

49%

Of the Youth in the EMEA region turned to developing their creativity in their spare time during the crisis.

56%

Of the APAC youth Z did so. [2]

INTROSPECTION TIME

“

I also will remember 2020 as a year where a lot of growth happened. I think for me and a lot of people who were taught to do one thing over and over again, as who they are, were either let go of or told that this thing wasn't important anymore. They were left to their own devices at home with no other opportunity, but to think about who they are. So yeah, personal growth is a good one for 2020.”

Thibault, LA

“

And then during this pandemic, I finally had this time of introspection. I realized how important it's to be, to have time with myself, to actually know myself to have conversations with myself.”

Joyce, Beijing



ALTERED INDIVIDUALI- SATION

BEFORE COVID-19

People are keen to define **who they are** and to be their ‘**best selves**’.

Advances in global education, health and technology **have helped empower individuals** as never before.

People increasingly want to be unique, achieve on their own terms, and follow their own paths to self-fulfillment.

COVID-19 CRISIS EFFECTS

CRAVING INTERACTIONS

31%

Of Italian youth stated that meeting with friends would be the first thing they do when the pandemic is over. ^[1]

“

I feel like I've gotten so much closer to my friends suddenly, because I feel like because they're so far away, I miss them. And you value each other so much more and you take time to show that as well.”

Aditya, Mumbai

SOLIDARITY AND EMPATHY SPIKE

74%

Of global Gen Z says the pandemic has highlighted new issues to them and made them more sympathetic to the needs of others around the world. ^[2]

LOOSING INDEPENDANCY

2.2 MN

Of U.S Gen Z between 18 and 25 Y/O moved back with their parents in March and April in the wake of Covid. ^[3]

BEFORE COVID-19

Thanks to **new technologies** and the internet, people are **always 'on'**, spending more and more time online **and overwhelmingly connecting with each other** on digital platforms.

**INCREASED
HYPER
CONNECTIVITY**

COVID-19 CRISIS EFFECTS

SOCIAL MEDIA MULTIPLIED ITS PURPOSES

38%

in Germany, 38% of 18- to 24-year-olds used Instagram alone to access Covid related news, and in Argentina, this reached as high as 49%.^[1]

73%

Of the American Gen Z has used Instagram to pledge their alliance with black communities.^[2]

- **K-pop fans all over the world have organised to flood #whitelivesmatter** and other right-wing hashtags with fan content to drown out racist and offensive voices.
- **Gen Z activists in Hong Kong used Animal Crossing** to stage a virtual anti-government protest, featuring characters holding torches and signs that read "Free Hong Kong." As a result, the game was banned in China.

BEFORE COVID-19

Thanks to **new technologies** and the internet, people are **always 'on'**, spending more and more time online **and overwhelmingly connecting with each other** on digital platforms.

**INCREASED
HYPER
CONNECTIVITY**

COVID-19 CRISIS EFFECTS

24/7 DIGITAL ENTERTAINMENT HEIGHTENED

62%

Have increased their time spent on social media (versus 42% for older generations).^[1]

70%

Have increased their time spent on video streaming (versus 61% for older generations).^[1]

59%

Have increased their time spent on gaming (versus 35% for older generations).^[1]

86%

Of US Gen Z said mobile video has helped them cope with the COVID-19 pandemic, with 88% of respondents seeking entertainment.^[2]

THE E-COMMERCE PUSH

33%

Since the pandemic began, 33% of these consumers have increased their online spending, for a net increase of 6%, versus 23% of consumers in older generations, or a net increase of 1%.^[3]



SOCIAL POLARIZATION

BEFORE COVID-19

Across the globe, social inequality is fuelling dissatisfaction, division, protectionism and a rise in nationalism.

Dissatisfaction with the current system is widespread, and a growing number of people believe it can no longer be relied on to deliver a better future.

CRISIS EFFECTS

ERODING TRUST

-10 Pts

In just two months, the average trust rating from US Gen Z for major institutions (police, government, news media etc..) has dropped from 56 percent to 46 percent.^[1]

38%

Of 18-34 Y/O Australians say they believe the government has responded badly to the pandemic.^[2]

FEAR OF PRECARIETY

50%

Of French 16-24 Y/O is fearful of loosing their jobs VS 18% of 55+.^[3]

WITNESSING INEQUALITIES

“

There were some people who still had to go out there and do their work. Some people were not allowed to sit at home. And all of that was just shocking to know. And it's such an analysis of just privilege.”

[Pryianka, Mumbai](#)



SOCIAL POLARIZATION

BEFORE COVID-19

Across the globe, social inequality is fuelling dissatisfaction, division, protectionism and a rise in nationalism.

Dissatisfaction with the current system is widespread, and a growing number of people believe it can no longer be relied on to deliver a better future

“

Instead of the pandemic and the lockdown hampering youth activism, it has surprisingly fueled it.”

Mark Edelman Boren, author of *Student Resistance in the Age of Chaos: Bodies on the Front Lines, Technology, and the Surge of Activism in the 21st century*.w

CRISIS EFFECTS

OUTRAGE UNLEASHED

77%

Of US Gen Z attended protest related to BLM. [1]

In China a video, released on Bilibili, titled 后浪 (The Next Wave) featured veteran actor He Bing. He addressed the young people of China stating, “The ageing generation looks upon you with envy.” This led to a huge backlash on Weibo with #SpeechToTheYoungerGeneration# trending. One comment stated, “How about you lower housing costs and increase the wages for the next wave? The waves are almost completely dry...”

In the UK, students protested for days about the mishandling of their A level tests, asking for the resignation of the Education Secretary.

“

This generation wants to take ownership and engage with their hearts and hands. There is a newfound sense of quiet courage to stand up in ways we have not thought of before now (...) this lockdown has seen some really inspiring young role models come up, who are leading by example.”

Neha Buch, CEO of Pravah, an Indian youth-led organization towards social change.

BEFORE COVID-19

The search for **health and well-being** has become **omnipresent** in people's daily lives.

“

Mental and emotional wellness has been the biggest trend in the wellness space before coronavirus and it will become even more *important after*”

Beth McGroarty, director of research and public relations at the [Global Wellness Institute](#).



**INCREASED
FOCUS ON
HEALTH &
WELL-BEING**

COVID-19 CRISIS EFFECTS

MENTAL HEALTH TOOK CENTER STAGE

44%

Of young people in the UK reported mental health as the biggest issue they personally face at the moment, ahead of coronavirus (36%).^[1]

27%

Some 27% of Indian Generation Z believe that the Covid-19 pandemic has taken a significant toll on their mental health.^[2]

In May during Mental Health Awareness month, **TikTok hosted an online campaign to raise awareness with the hashtag #mentalhealthawareness (which has accumulated 1.8 billion views)** for users to share their stories, fight stigma, educate the community, and advocate for others.

HEALTH OVER WEALTH

90%

Of US Gen Zers believe the priority should be getting COVID-19 under control and stopping the spread, while only 10% say the priority should be getting the economy back on track.^[3]

Sources: [1] Youth Fear and Hope [2] [The Mavericks India](#) [3] [The Pulse of Gen Z in the time of Covid 19- Do Something Strategic](#)



SUSTAINABILITY EMERGENCY

BEFORE COVID-19

Environmental concerns make sustainability a **global focus** and an urgent, common goal.

There is **growing demand** for **sustainable brand** values, products and practices.

COVID-19 CRISIS EFFECTS

SUPPORTING LOCAL

40%

Of US Gen Z say they will aim to support local small businesses as a result of the crisis.^[1]

CRAVING NATURE AND SIMPLICITY

“

Tumblr has seen a 153 percent increase in Cottagecore posts since March and the hashtag has also racked up 252 million views on TikTok.”

Edited, a data analytics company

In the wake of the **pandemic, the popularity of domestic products** or 国货 (Guohuo) has also seen an increase, while health conscious consumers have also **embraced TCM** (Traditional Chinese Medicine)

INCREASED ECO RESPONSIBILITY

“

Consumers are aware of the positive impacts of Covid-19 on the climate, having witnessed *China's* lesser-polluted cities, wildlife wandering into Welsh villages and seabirds returning to *Venice's* cleaner canals. They will be cautious to undo such groundbreaking environmental benefits.”

Holly Friend, senior foresight writer, The Future Laboratory



PART 03

GEN Z IN THE NEW NORMAL



1. BEHAVIORS & ASPIRATIONS

2. SOCIAL MEDIA

3. RELATION TO BRANDS AND CONSUMPTION

1. BEHAVIORS & ASPIRATIONS

Will 2020 radically change Gen Z's core identity and belief system or will it solidify this generation's characteristics ?

“

This isn't changing their behaviors it's just further proof for them that things aren't stable and that they were right about older people and institutions. They will become more certain that they can only count on themselves and their generation to do the work. Covid isn't new to them it's just exposing things to the world that they already knew notably that systems are broken.”

[Molly Logan, Founder of Irregular Labs](#)

“

We found that while the pandemic has stirred up every aspect of their lives, their core values, attitudes and the way they think about consumption remain unshaken. If anything, the pandemic seems to be solidifying some of the generational characteristics they already possess, particularly their cautious approach to spending, their aspirations for a more just world and their optimism.”

[Hana Ben-Shabat, Founder of Gen Z planet.](#)

- The pandemic was not a shock to their system per se, it was an accelerator of their mindset, priorities and willingness to affect change. **2020 had a radicalizing effect on this generation.**

ONE PRIORITY: FUTURE PROOFING THEIR LIVES

Among the ones hit the hardest by the crisis in terms of loss jobs (the UN estimates that 1/6 of 18-29 y/o lost their jobs during the pandemic) , financial insecurity or reduced education prospects, **Gen Z on a global scale will be working hard to overcome these new obstacles.**

Gen Z is expected to become increasingly more financially conservative and their price conscious consumption is likely to expand:

“

My only obsession is to secure the bag.”

[Brandon, Paris](#)

59%

Of the Gen Z in the US said that they will be **more financially conservative** going forward.^[1]

“

Even before the current crisis, these youngsters were sliding back down Maslow's hierarchy of needs, back toward those more fundamental concerns over economic security. The arrival of Covid-19 will likely entrench all of this, focusing their minds not only on economic security but, at an even more basic level, their physical security too.”

[Matthew Goodwin professor of politics at the University of Kent.](#)

RECKONING WITH THE CONSEQUENCES

55%- 51%

Of UK's youth people feel that the coronavirus outbreak has limited their options for the future. 51% think that Coronavirus will cause huge long-term disruption to their future prospects.^[2]

BUILDING STABILITY

60%

Of American Gen Z say they are now more likely to train or look for a job with better benefits or pay.^[3]

THE RESILIENT ONES

“

Perhaps Generation Z will be known as the ‘resilient’ generation who learned at a sensitive age that it is possible to overcome crises without their entire life collapsing.”

[Dr Tuomo Kuosa, Content Director, Futures Platform](#)



Sources: [1] Gen Z Planet, Stirred but Unshaken, 2020 Survey 500 participants [2] Youth Fear and Hope 2020 [3] The Pulse of Gen Z in the time of Covid 19- Do Something Strategic

YET TURNING TO A MORE HEDONISTIC LIFESTYLE

In the pre 2020 world, Gen Z was already a cohort yearning towards adulthood and missing on youthful experiences, the pandemic **has only highlighted this state by preventing them to have accesses to key landmarks of their youth** (graduation, first internship, first job, first summer vacation with friends etc...).

THEY'LL MAKE UP FOR LOST TIMES

The upended world state and the time to reconsider their mortality during lockdown **is expected to unlock a more hedonistic and carefree approach to life** for this group. The need to unwind post crisis and the **fact that many of them will have to go back living with their parents** will heighten this teen spirit. **A second wind might be in the making** for this cautious and responsible cohort.

“

I do feel that in the next 3 to 5 years there will be this derivation from that linear trajectory towards adulthood they are on and this pushback to be more hedonistic.”

Holly Friend, Senior Foresight Writer, The Future Laboratory

INDULGING ON EXPERIENCES

Food, drinks and travel are the most common spendings Gen Z interviewed cite as their ways to indulge in the future. Building moments to remember and sharing real-life interactions **with a nonmaterialistic approach to indulgence**, as witnessed during the rush back to parties and real-life connections in countries with lifted lockdown.

“

I'm definitely ready to spend more money on good moments, materialistic things have lost value to me.”

Mariane, Paris



PROJECTED SPENDING

70%

Of Western Gen Z is expected to increase their per capita spending by more than 70% in the next five years.^[1]

“

I think that they'll definitely be an uptake in hedonism after this year, because for most people being stuck inside or being limited in terms of how they can socialize, it's going to affect how they behave, when they are able to socialize again.”

Amber, Shanghai

“

Good food, good alcohol, good people.. And travel.”

Brandon, Paris

THEY'LL DISCONNECT FROM "ALWAYS ON"

BIDING GOODBYE TO HUSTLE CULTURE ?

The dedicated time spent on self reflection during the lockdown has led to a **growing disbelief in the "always on" mentality** and a desire to slow down and be less productivity oriented.

Self care will be a key priority for this cohort who will make sure that their holistic wellbeing is prioritized and taken care of.

“*With these times and the inequalities that have shed light upon them, more people are starting to assess how much they're willing to sacrifice for their work and how do they balance those things. Because I think we're becoming more conscious of, are you living to work or working to live?"*

[Amber , Shangai](#)

“*The old narratives of busyness can be undone; brands can flip the script and start to celebrate anti-striving... They can alleviate our guilt about doing nothing through the same marketing mechanisms they used to create it... They can portray unceasing productivity as an unenlightened and passé choice.'*

[Ana Andjelic, Sociologist and strategy executive](#)

“*Also capitalism, working all the time, what's the point ?"*

[Pryanka, Mumbai](#)

PRIORITISING MENTAL HEALTH WILL BE THE NORM

64%

Of global Gen Z Vice Voices predict that in 2030 going to therapy will be commonplace. [1]

FAMILY TIES AS SAFETY NETS

44%

Of US Gen Zers say they will be more likely to live close to family, and over a third say they'll be less likely to live in a city — largely driven by a desire for safety and a renewed sense of importance and value of being near family members in trying times, and spending time with them in general. [2]

Tagline for Blume – a Gen Z beauty and health brand



Sources: [1] The Vice Guide to 2030, Well Being [2] The Pulse of Gen Z in the Time of COVID-19, Do Something Strategic

WHICH WILL ACCELERATE THE HOMEBODY MINDSET

Despite most young people being ready to spread their wings, a considerable group will choose to play it safe by continuing to stay at home but also because they have learnt how safe and enjoyable home could be.

THEY WILL CONTRIBUTE TO THE ACCELERATION OF THE HOMEBODY ECONOMY BOOM

They'll be investing more in-home improvement and augmented home entertainment products and services. They'll be thriving to look for their own place and reach their state of independence as witnessed by the rise of collective houses.

Gen Z will be apprehending the home in two ways going forward. The safe place enabling them **to reconnect with themselves and indulge in self care**. Tapping into that opportunity Girls Night In is a collective reclaiming the pleasure of staying in.

They will also be willing to **bring the outside world inside and entertain more at home in a more intimate and meaningful way**, an approach reserved beforehand mostly to Millennials.

“

The lockdown has helped me get rid of that FOMO I was always under and I haven't reconnected with that, I'm ok with staying at home more and not being at the right party every week.”

Marianne, Paris



“

A good house is so important for your mental health.”

Aarman, Delhi

“

The home has been re branded as this bubble this safe place with the pandemic, especially for Gen Z. It will have such a big impact on their future because this rebranding has happened at such a pivotal moment of their coming of age.

Add to that the fact that Tik Tok thrives in the home space, in that homebody narrative it has become that currency of cool online.”

Holly Friend Senior Foresight Writer at The Future Laboratory

52%

Of 13-39Y/O in the US state that even after the crisis is over, they'll be spending most of their time at home. ^[1]

WHILE GROWINGLY WORRIED THEY WILL BE WILLING MORE THAN EVER TO AFFECT CHANGE

ALREADY AN ESTABLISHED MINDSET PRE COVID, GEN Z DOESN'T RELY ON ANYBODY OTHER THAN THEIR GENERATION TO GET THE WORK DONE.

Contrarily to Millennials they don't turn to traditional institutions or brands to do the work but expect them to support them in their quest. This will only expand more and be highlighted in the careers Gen Z shows to embrace and the organizations they will choose to be a part of.

“

The NRC protest that happened in January. That happened in my backyard. So seeing that in front of me, seeing all of those things made me... more confident to stand up for what's right. Seeing people stand up for what's right gave me courage to do that as well.”

[Aarman, Delhi](#)

This need for more pragmatic and change making actions is being felt and entities are already finding ways to respond to Gen Z. For instance, The London Interdisciplinary School, a new UK university opening in 2021, will scrap traditional courses altogether – instead, offering bachelor's degrees designed to tackle real-world issues such as pollution, knife crime and childhood obesity.

SOMBER WORLD VIEWS

86%

Said they think the future will be characterized by worsening climate disasters and 63 % said they expect to see more global conflicts in their lifetimes. ^[1]

TAKING ACTION

80%

Of global Gen Z readers of Vice Media said that in the next ten years they plan to join organizations that fight for the issues they care about. ^[2]

“

Whilst current world events have derailed Gen-Z's plans, they are still shaping up to be a very influential generation. They are already impacting their parents' habits, are ready to instigate change, and are embracing the brands who can help them make that change.”

[Wanda Pogue, chief strategy officer at VaynerMedia](#)



THEIR QUEST FOR KNOWLEDGE AND JUSTICE WILL GROW MORE INTENSELY

AND IT WILL BE HARD TO KEEP UP WITH...

DECONSTRUCTING INFORMATION

The pandemic and social unrest of this year has rendered Gen Z more defiant than ever. Relying on ever growing and ever polarized sources of information Gen Z will increasingly challenge the status quo and demand changes within traditional institutions but also challenge their own perceptions of truth, being ready to unlearn knowledge when brought new perspectives on a matter.

Growing up with fake news means that for them there's no one, single version of the truth, and they use social media and the internet to explore new directions, interpretations and truths not taught by the 'establishment'.

“

Gen Z are taking control, calling out misgivings and setting up alternative spaces that encourage decolonized discourse and critical thinking.”

[Shanu Walpita, trend consultant and lecturer, London College of Fashion](#)

(SOCIAL MEDIA) ACTIVISM WILL INTENSIFY

Already a very informed generation, they will keep flexing their social media activism by creating and sharing easily understandable knowledge on digital channels. Without forgetting to take their activism to the streets.

“

The BLM protests have definitely democratized the idea of going to protests for people of our generation. *It's like now it's our time to stand up about the subjects we care about.*”

[Charlotte, Paris](#)



miss toler
@CH1ONESO

NORMALIZE CHANGING YOUR OPINION ON SOMETHING AFTER LEARNING NEW INFORMATION. ITS OKAY. I PROMISE.

02:46 · 31/05/2020 · Twitter for iPhone

225K Retweets 662K Likes



It might not be trending but....

Black Lives **Still** Matter
There's **Still** an Apartheid in Palestine
Yemen Is **Still** Starving
Syrian Children **Still** Have PTSD
They're **Still** Selling People Into Slavery In Libya
Kashmiris Are **Still** On Lockdown
Afghans Are **Still** Being Persecuted
Malians Are **Still** Malnourished
Venezuelans Are **Still** Fleeing
Lebanese Are **Still** Being Robbed Of Their Future
Iraqis Are **Still** In A State Of Fear
Ethiopians Are **Still** Dying From Hunger
Central American Children Are **Still** In Cages
Native Americans Are **Still** Dehumanized
Our World Leaders Are **Still** Greedy

ON THEIR INSATIABLE QUEST FOR MORE INFORMATION AND JUSTICE

“

It's very logical: this generation has only known a world that is utterly unstable from their birth. Politically, environmentally, culturally, economically. That's all they've ever known.

So sadly they have this comfort with ephemerality, fragmentation, multiplicity and destabilization meaning when they are protesting people think they'll stop protesting, they will not. Other generations were not comfortable with this constant instability they went back to their lives after attending a protest. Gen Z is not like that. They won't back off.”

Molly Logan, founder of Irregular Labs

“

We are growing up in an age which is information-rich. We are seeing lots of young people take charge, because how can you not with all that information at the tips of your fingers? Why would you sit silent? You have no reason not to know, not to read.”

Meg Zeenat Wamithi, founder of Gen Z mental health support hub My Mind Matters Too

“

Unlike previous generations, their focus is not just on themselves, but on improving the quality of life for others.”

Brandy S. Faulkner, PhD, assistant professor in the Department of Political Science at Virginia Tech

THEIR EXACERBATED THIRST FOR JUSTICE AND CHANGE WILL CREATE A TENSION IN THEIR BEHAVIORS IN WHICH THEY'LL BOTH LOOK FOR MORE UNITY ALL WHILE SLIPPING INTO MORE POLARIZED GROUPS

SOLIDARITY AND UNITY



VS

POLARIZED COMMUNITIES



“

I think because there were so many movements around the world that was a sense of, “Oh you're disempowered? I'm disempowered too And there's actually such few people who are actually in power”. So that I think it reverberated around the world and, it kind of empowered everybody to think, “Oh, if I wanted, maybe I could speak against my government as well, or I could speak about my experiences with racism as well.”

So I think there was some sense of global empowerment that was rooted in love and empathy and connection.”

“

There is also a lot of radicalization on the Internet right now, and just very polar views.”

THEY'LL TRY TO CREATE MORE BRIDGES

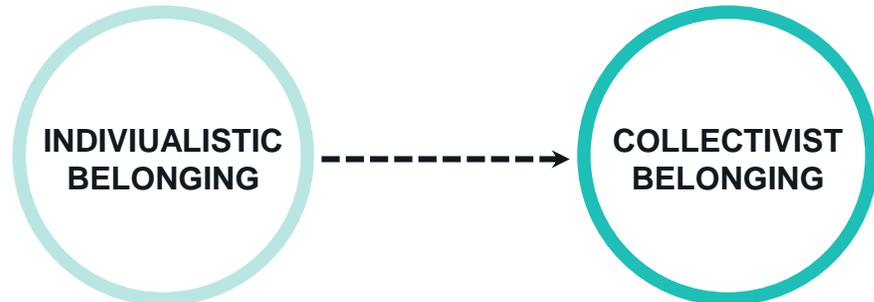
GEN Z HAS BEEN INTRODUCED FIRSTHAND TO THE POSSIBILITY OF A GLOBAL UNITY FOR THE GREATER GOOD IN 2020. AND THEY'VE EMBRACED THAT IDEA.

“

The greater shift is the shift towards more solidarity, this is the newness. They had been previously individualist in a collective way as they were looking for belonging. Now they've seen that it's possible for humanity to come together, in the past they hadn't really seen this, they've seen that people can work together for the greater good whether it's the BLM movement, the climate crisis, celebrating key workers, keeping the Covid low rates etc....There is this new sense of solidarity and conviviality for Gen Z.”

[Holly Friend, Senior Foresight Writer, The Future Laboratory](#)

Gen Z has taken up on themselves to connect globally on a lot of causes in the past few months notably through social media and is likely to keep looking for ways to unite against a “greater power.”



“

And so fundamentally we're realizing that it really comes down to power and whether it's power between the privileged and the marginalized, or a certain political wing and another, and we're realizing that none of us in our little divisions have much power at all. And it's not like inter fighting that we should be focusing on. I definitely don't think we're there yet, but I think that is the direction that we're moving in. And that's pretty interesting. And I would say that's a motor for long-term change than the short-term change.”

[Suknidkh, Mumbai](#)

“

So I think that's something that has stuck around as a major milestone through this year, was this moment of real unity amongst just the people about kind of coming together. I think that sort of community feeling was quite a milestone.”

[Aarman Delhi](#)

“

A lot of people – based on what they expose themselves to – feel that their opinions and their world view are right because we curate our lives in a way that we see what we want to see. We're constantly in these silos, where we're trapped in terms of information and perspective. If we can create more cross-pollination, listening and understanding, then the possibilities are endless.”

[Wilson Oryema, co-founder of Regenerative Futures](#)



SOCIAL
POLARISATION



...ALL WHILE BECOMING MORE POLARIZED

THE HIGHLY INFLAMMATORY CONTEXT OF 2020 HAS LED GEN Z TO RADICALIZE AND STAND MORE STRONGLY ON SEVERAL TOPICS.

While Gen Z has been very open to progressive discussions, the potential for conflict has risen, keeping in mind that division exists at a high level for Gen Z (race, equality, socio-economic).

“

They are drawn to picking side. There is no longer much room for being on the fence or in the grey area, everyone is being encouraged to show what side they're on and very quickly and they are being attacked on social media if they don't.

[Holly Friend, Senior Foresight Writer, The Future Laboratory](#)

This will accentuate their quest for belonging to smaller units. Like minded communities will grow stronger among this generation even though 2020 has created a number of new alliances between different communities.

This will inevitably to a greater atomization of this group as every nuance of their identities will be a reason to join a micro group.

“

The new priorities will be, to stay in the same community that you feel comfortable with, and not really trying to over expand your social life. I think having same tight community that you have right now, is very important.

[Jerry, Hong Kong](#)



 SOCIAL POLARISATION

SPIKE OF CONSPIRACY THEORIES
23%

Of young Americans (Millennials and Gen Z) think that the holocaust is a myth or exaggerated.^[1]

26%

Of 18-29% Americans think that COVID was intentionally planned by powerful people.^[2]

BACKLASH LOADING

50%VS 70%

Of male Gen Z in the UK believe that feminism has gone too far while 70% of female Gen Z in the UK declare themselves as feminist and consider sexism a major issue in the UK.^[3]

“

There is also a lot of radicalization on the Internet right now, and just very polar views.

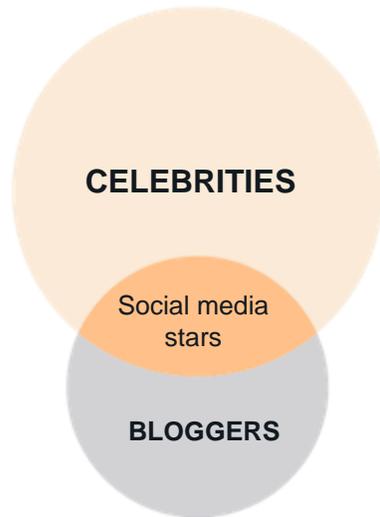
[Priyanka, Mumbai](#)

Sources: [1] U.S. Millennial Holocaust Knowledge and Awareness Survey,2020 [2] Pew Research Center, June 2020 [3] Young People in the Time of COVID-19, HOPE not hate 2020 and Young Women's Trust

2. **SOCIAL MEDIA**

THE EVOLUTION OF SOCIAL MEDIA

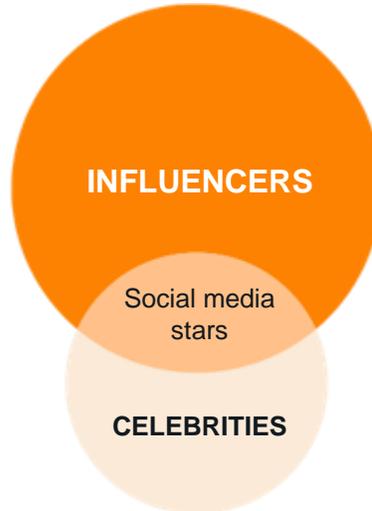
2010
ASPIRATION



Shifts impacting the transformation of the blogosphere

- Inception of visual platforms like Instagram, Pinterest & Tumblr
- Mass adoption of the iPhone and other smartphones (portable cameras)
- The birth of the hipster
- Individualism over collectivism
- The rise of the experience economy
- Emergence of new status symbols related to the experience economy (travel etc.)
- Internet and meme culture develops
- Digitization of social validation

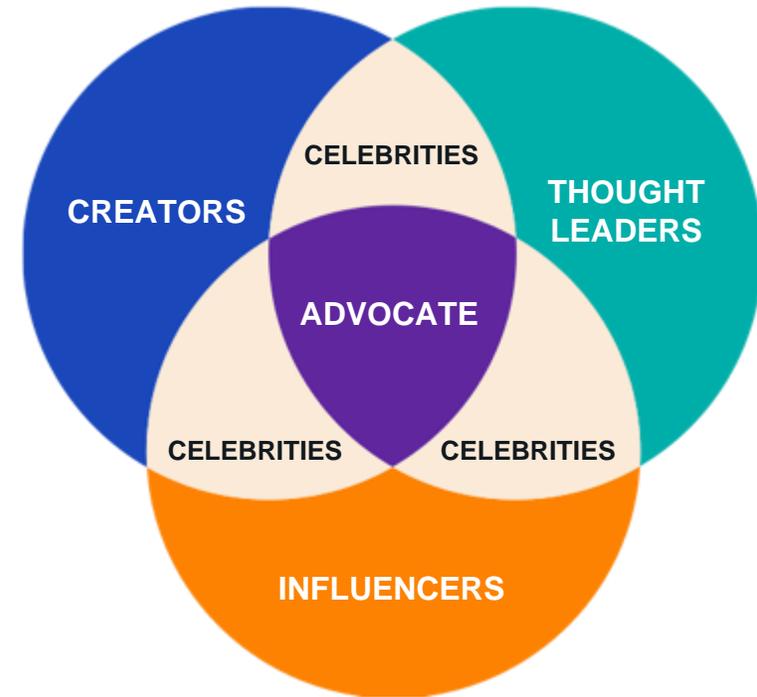
2015
INSPIRATION



Shifts impacting the transformation of the influencer economy

- The rise of 'realism'
- Proliferation of social networking saturation
- Fake news and misinformation lead to a post-truth society
- Disingenuous influencers backlash
- Cancel culture and social shaming emerge
- Pockets of collectivism gain traction
- Participatory platforms like Tik Tok
- Increased awareness of social issues and inequalities
- Social media detowes along with slow living result in a decrease in sharing
- Increased mental health awareness
- Conscious consumerism gains grounds
- Loneliness recession affects human connectivity

2020
INFORMATION /
EDUTAINMENT



THE NEW FACE OF SOCIAL MEDIA

IT'S A NEW DAY

While social media – especially Instagram- has long served as a platform for escapism and curation, it has recently become a portal for important conversations about activism, racism, politics, identities, environmental topics.

Throughout the COVID-19 pandemic and 2020's various social movements, Gen Z has converted social media into a platform to advocate for justice.

By using Twitter threads, Tik Tok informational videos, and Instagram graphics to explain complex subjects in just the swipe of a finger, Gen Zers reach millions within minutes. Through cyberspace, Gen Zers have created forums, organized protests, and held crucial conversations about various topics.

SOCIAL SIGNALING EVOLVES

Social signaling is changing, and platforms are evolving from places of aspiration and individualism to places of accessibility and collectivism. Users still discuss their skincare routines, but they're also exercising compassion by sharing their emotional experiences, lifting one another up, spreading educational resources and supporting hashtag campaigns that can help others.

ADVOCACY OVER INFLUENCING

Disdain for out-of-touch mega celebrities and a renewed enthusiasm for community connections are two key side effects of the pandemic and civil unrest, elevating influencer initiatives based on communities to swaying individuals, rather than vice-versa. It's a hive mentality where the idea of 'advocacy' is coming to the fore, replacing traditional forms of 'influence'.



Clearly there's been a shift since Covid and mostly BLM, where influencers now have to showcase this and take part in societal movements."

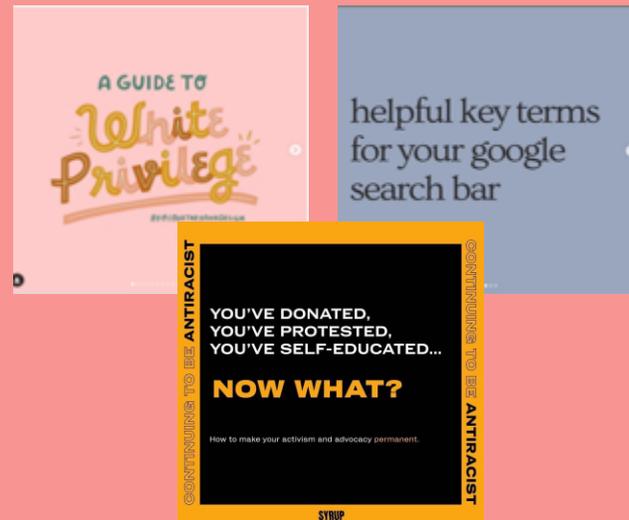
Mariane, Paris

INFORMATION OVER INSPIRATION

Using meme, humour, internet codes and social media aesthetic, Gen Z has fundamentally changed the trajectory of social media making them their main sources for information and empowerment.

Instagram's 10-image carousel has been repurposed by activists, advocacy groups, and individuals to vocalize their activist positions on overlapping global health, environmental, and civil rights crises. Dedicated accounts like So You Want to Talk About... (launched in February) have amassed millions of followers.

They'll now be looking for content that inform them and that can be easily shared to be able to mobilize their communities on any given topics.



See: Snpachat Voter Turnout feature in the US

EDUCATION OVER SELLING

Educational content has become increasingly popular since the beginning of the pandemic, revealing that simply filling the digital airwaves doesn't cut it. Smart influencers and their brand partners are producing posts aimed at upskilling follower.

They'll be expecting growingly that brands provide support in their actualization and upskilling as witnessed with the viral case of JW Anderson knitted sweater.



British fashion label JW Anderson recently released the knitting pattern for a cardigan from its Spring 2020 men's collection.

With a £1,250 (\$1,622) price tag and rapid sell-outs, the item was unattainable for many. So fans crafted their own versions through online knitting communities – The viral challenge has gotten the attention of designer Jonathan Anderson himself, who posted the exact measurements for fans to knit the cardigan themselves. #HarryStylesCardigan has accumulated over 330,000 views on TikTok/

TOWARDS MORE INTIMATE AND PASSION BASED CONTENT

MORE PERSONAL AND NICHE

This cohort will actively look to alternative spaces and niche social media vs mainstream content with all the commercial aspect associated to it. This will also be reflected in their growing rejections of bigger influencers that only bring a commercial perspective to the table.

“Tik Tok had gained such a popularity also because it felt it couldn't be infiltrated by brands. And now even if they are there it still feels like its owned by the people rather than the man, the corporations. *It's about brands positioning themselves as anti mainstream, the alternative.*” Holly Friend, The Future Laboratory

“

Micro influencers are 100 x more influential for us than the macro ones. The micro ones you know them they are friends with someone you know. It's so much more legitimate.”

6%

Only 6% of Dazed Youth panel feel that influencers with 100k+ followers have an influence on their purchase decisions

RISING OF THE FAN ECONOMY

Fans are entering more intimate, immediate, and interactive relationships with content creators. The passion economy is giving rise to prosumers who collaborate with influencers, putting creative processes at the core of the fan experience. The brand-influencer economy is changing from transactional product endorsements to building specific community relations.

“

In the future I could see us paying subscriptions or fees to access content from people we follow. We didn't imagine 5 years ago that we would be paying monthly subscriptions to stream music or watch movie, yet here we are.”

Brandon, Paris

CLOSE CIRCLES ONLY

Close friends Instagram's feature has helped young users be more protective of their social lives and to reinforce the bounds uniting them to their communities. The pandemic has reinforced the usage as this group was craving more meaningful and personal interactions.

A handful of already established influencers are now charging their followers to access this more exclusive and private content, leading the way to a new approach to content consumption on these platforms.

INTIMATE CONSUMER ENGAGEMENT

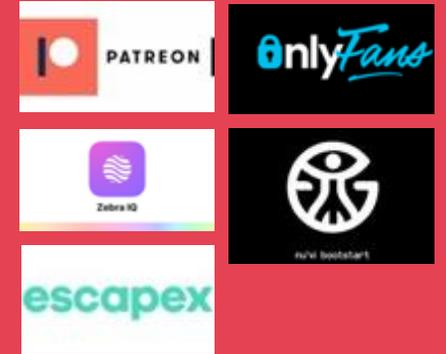
This need for more intimate conversations will lead to a new usage of these tools and brands will have to adapt to consumer's need to more qualitative and intimate interactions.

“

We have more brands coming to us asking to find new ways to continue the conversation initiated by their content on our platform- building more intimate and engaging relations, like through small numbered WhatsApp group where they can directly converse with their consumers.”

Zoe Michel, Editor in Chief MAD media

COMMUNITY BASED APPS EMPOWERING CREATORS WILL THRIVE



A cohort of new platforms empowering creators to monetize their content are contributing to the development of the Fan Economy.

“

Micro-transactions on content are the future, whether it's educational or exclusive access.”

Steven Lammertink, Founder & CEO, The Circle

These new platforms will pose a challenge for brands. Firstly because influencers are likely to rely less on brands partnerships to sustain themselves. Secondly because as users gravitate towards these platforms, the question of joining in and asking followers to pay for the content produce will arise.

SOCIAL MEDIA VS. POST-SOCIAL MEDIA

SOCIAL MEDIA ERA (2000 - 2020)	POST-SOCIAL MEDIA ERA (2020 -)
Many connections (1000+), Unlimited potential reach	Fewer connections (<100); deep engagement on specialized topics
Open	Exclusive or semi-private communities
Free for all	Barriers to entry
Curated by algorithms	Curated by trusted connections
Revenue through advertising	Revenue through subscriptions and other direct participation models
Designed to collect data	Designed for privacy
Number of followers as status signaling	Quality of interactions as status signaling
Growth as key success metric	Trust as key success metric

3. BRANDS & CONSUMPTION

THEY WILL PUT CAPITALISM ON TRIAL

As Gen Z stands up against any form of oppression and wants to amplify the voices of the marginalized, their critic of capitalism initially stems for the role it plays in oppressing the more fragile and belonging to old systems they want to smash.

“

A lot of Gen Zers have an adverse relationship towards capitalism because they've seen the really bad parts about it that include the dehumanization of the everyday worker.”

Tibault, LA

Already a concept the most radical Gen Zers were rejecting with hashtags like #eattherich permeating the zeitgeist, capitalism has been put on blast by a growing number of this cohort as a result of the pandemic and the resurgence of Black Lives Matter, a movement connecting the dots between the exploitative nature of capitalism and the oppression of black lives.

The shift towards capitalism deconstruction is underway for many of them, in a more or less radical manner depending on where they live in the world and their degree of politization.

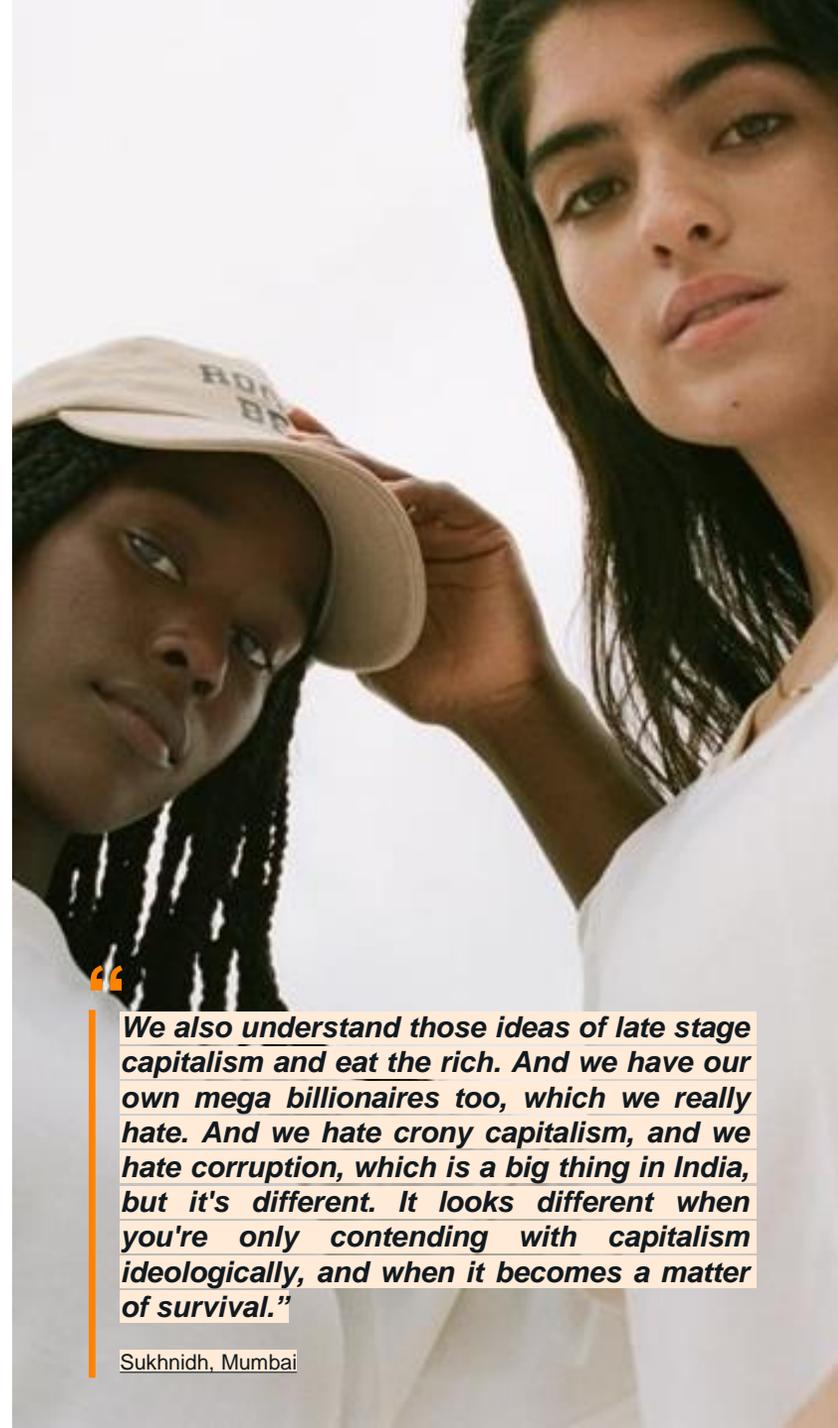
Their quest for a more flexible and slowed lifestyle will help accentuate their critic of this system seen as enabler of the always on mentality.

Additionally they will be naturally linking their quest for more ethics and sustainability to the practices of capitalism, adding on to their aversion to this system. These messages are already making their ways into social media helping spread this mindset among a larger part of Gen Z.

“

There is no such thing as ethical consumption under capitalism.”

Nayllah, NY



“

We also understand those ideas of late stage capitalism and eat the rich. And we have our own mega billionaires too, which we really hate. And we hate crony capitalism, and we hate corruption, which is a big thing in India, but it's different. It looks different when you're only contending with capitalism ideologically, and when it becomes a matter of survival.”

Sukhnidh, Mumbai

“

The pitfalls of late stage capitalism have never been more obvious for everyone, everyone has seen people in their communities hurt, you know that people are hurting, and you can't ignore it.”

Megan, NY

“

I still think capitalism is evil, but at least in China, based on my personal experience, it does help a lot of people to have a stable life and all that. I think capitalism in long-term is not going to work. It's not going to promoting equal, just work, but in short term it can help.”

Joyce, Beijing

“

“If Millennials and Zoomers are now falling down the hierarchy of needs, then might they revive older debates about economic redistribution, jobs, taxation and inequality? We could be about to witness the return rather than the retreat of the traditional Left-Right divide in politics.”

Matthew Goodwin professor of politics at the University of Kent

THEIR TAKE ON CAPITALISM IN A NUTSHELL

“

We have arrived at a stage in the history of the world where for our generation we know which systems don't work anymore and we want to get rid of them as they are. And capitalism is one of them. So I don't know how we'll do that, but we'll definitely do it.

I've been deconstructing capitalism a lot lately. So yes, I want to be rich, but not by working for Zara, not by exploiting people, not by polluting the planet. And definitely not as rich as the older generations or all these billionaires but a rich which I'll will be content with. The rich where I can travel and enjoy moments with people I love.”

Charlotte. Paris

THEY'LL BE INCREASINGLY LOOKING, AT CORPORATE CULTURE AND SUPPLY CHAIN PRACTICES

Communication won't fool Gen Z they'll be finding what happens behind the curtain of corporations and expose the ones who are not acting accordingly to their set of values.

In the wake of BLM and in the age of social media testimonies, corporate culture, lack of diversity, sexism and discrimination behind these scenes will be increasingly looked at by Gen Z who will expect corporations' commitment to societal causes to start from within.

They'll want corporations' workforce to be representative of the world they live in. :

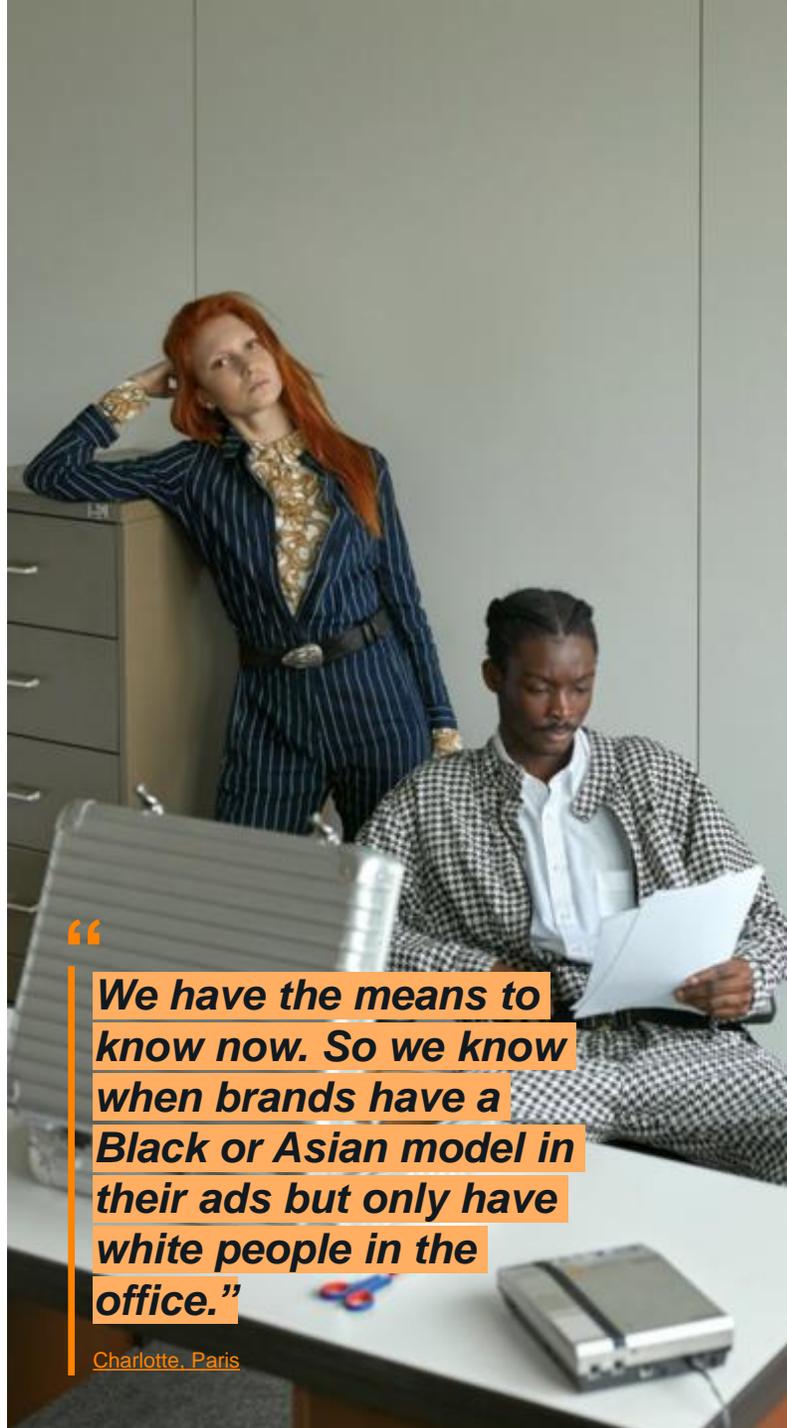
“

Brands are trying to figure out how to have this certain demographic trying to get the buying power from Black people now, or the buying power from LGBTQ community or from Gen Z. They think "We got to switch up and do this thing because this is what they want". I don't ever feel like there is a strong initiative or intention behind what they're doing, what if they just switched up their higher officials at their staff? Get us in there in that capacity to get our dollars."

[Gozie, LA](#)

2020's has seen a lot of exposure of Gen Z's favorite fashion brands bad supply chain practices or cultural insensitivity which has led to call to boycott from this cohort. While not all Gen Z will completely be turning their backs to them, they will heavily pressure these brands to actively change..

Going forward they will pay extra attention to how their products are made and especially to the condition of the workers making them. An already present pattern of Millennials' consumption, this will expand among Gen Zers who will take it even further than their elders.



“

We have the means to know now. So we know when brands have a Black or Asian model in their ads but only have white people in the office.”

[Charlotte, Paris](#)

60%

Of global Millennials and Gen Z say they plan to buy more products and services from large businesses that have taken care of their workforces and positively affected society during the pandemic. [1]

66%

Of American Generation Z shoppers say a company's reaction to BLM will permanently affect whether or not they buy from them in the future. [2]

“

I don't really like big corporations just because they underpay their workers. In big corporations' factories lithey get paid to sow so, per cent so making my garments They're paying people that low. And you know they're older people too, they're like our parents. It's just horrible. I'm working at a really good factory that pays their workers \$16 an hour and that's what everyone should do.”

[Branden, LA](#)

Sources: [1] Millennials & Gen Z Survey, Deloitte 2020 [2] Morning Consult, Covid Tracker

THEY'LL EXPECT ACCOUNTABILITY & LONG TERM COMMITMENT

FILTRERING THEIR CONSUMPTION AND LOYALTY

Globally, the BLM movement, Covid-19 and the climate emergency are driving a reappraisal of consumerism, prompting people to filter their spend into businesses that do good. In turn, with social media serving up instant information around brand ethics, shoppers are utilizing technology to make more moral purchasing decisions.

Socio-politically-conscious shopping is not a short-term trend. Gen Z consumers are widening the scope of their brand research to include political affiliation, systemic discrepancies and **long-term commitment of allyship.**

“

There is a difference between a moment and a movement and brands must understand that, if they want to reach us. It can't be performative solidarity or commitment anymore. They have to be willing to make true changes- and internally too.”

[Nyallah, NY](#)

CALL OUT CULTURE WILL BE THE NEW NORMAL

Calling out brands on their behaviors and missteps on any given topics will now be common practice for Gen Z netizens and consumers, who will intensify their scrutiny and denounce misgivings from brands. **The only way to earn their trust will be to embrace accountability and commit to long term, measurable, and transparent commitment along with empowering them to affect change.**

“

Building trust with Gen Z is about recognizing that businesses and brands no longer hold all the cards, and trust will never be a given. Trust will need to be earned, one kept promise at a time in order to win with them.”

[Michell Brisson](#), consultant for U.S. Monitor at Kantar.

VOTING WITH THEIR WALLET WILL BE COMMON PRACTICE

“

I feel that the mindset of “ Who do I want to support by giving them my money to and who I want to punish by not giving them my money” is growing stronger among us.”

[Charlotte, Paris](#)

“

I think 100%, we'll investigate more when we'll spend our money on a brand or an item. We'll be more cautious on what they stand for, what's the story behind them.”

[Jerry, Hong Kong](#)

23%

Of US Gen Z has stopped purchasing a brand because it hasn't taken enough action to help during this crisis or it has acted in a way, they don't like. ^[1]



Sources: [1] The Pulse of Gen Z in the time of Covid 19- Do Something Strategic

CULTURAL REVELANCY WILL BE NEEDED MORE THAN EVER

HAVING A HAND IN SHAPING CULTURE

In the wake of COVID-19, consumers are asking themselves what do they really need, what is essential to their lives, what really adds value to them? Brands will need to be part of a bigger cultural conversation, not just being influenced by it, but also being an influential force within it through content production, cultural collaborations, new experiences etc....

“

I do think that the commercial meanings of brands will get...there will be less emphasis on the commercial meaning of brands, post pandemic, but more of the cultural meaning.”

[Thibault, LA](#)

This cultural relevancy will also apply to cultural sensitivity and local appreciation. They'll expect global brands to be able to understand their specific culture all the way down to cities or neighborhood specificities. **Post-Covid the return of glocal marketing will be mandatory for big corporations to reach Gen Z.**

“

Western ideals have, populated everywhere, including India, but I also think that especially post the Black Lives Matter movement we are starting to see a little subversion. People are becoming a little alienated from this constant American hegemony. And we're kind of trying to route back into our cultures and realize that, they don't hold lesser value than the Western one; A lot of people will want to see an Indian element in what they are consuming, and I think that would really benefit the brand.”

[Sukhnidh, Mumbai](#)

44%

Of Dazed's global Youth panel find brands working with relevant cultural partners influential versus just 14% finding brands creating the latest products influential.^[2]

“

It'd be good idea to invite local artists or designers, or local people to actually collaborate to expand on the ideas the brand focuses on, but put more like a cultural focus, put more of a personal focus, not just taking someone as token, but rather actually understand the culture and actually take the culture in and take all those individualized thoughts and individualized experience into the projects And not just hiring an Asian model or hiring a Black, Indian, or a Latino American model or influencer to benefit the upper class white man.”

[Joyce, Beijing](#)

“

TikTok is incredibly democratic. Gen Z don't care who you are – they just want to see cool content – and that scares brands. They [the brands] can't just post a nice image – they need to have a personality.”

[Jay Richards, Founder & MD, Imagen](#)

Sources: [1] The Era of MonoMass, Dazed Studio, 2020 (Sample: 3,510 of Dazed's global millennial and gen z audience



THE “TOO COOL” AESTHETIC IN CHINA WITH SUBTLE REFERENCES TO CHILDHOOD NOSTALGIA AND SOCIAL SATIRE SHOWCASES HOW THE LOCAL GEN Z IS BUILDING A STRONGER SENSE OF CULTURAL CONFIDENCE.

THEY'LL ACCELERATE THEIR MINDFUL CONSUMPTION

After the pandemic many young people are going to be content with less. Firstly, they can't afford to buy the latest release. Secondly, they have a completely new perspective on what truly matters in life.

Post-pandemic society could end up being less materialistic, **with young people prioritizing meaningful moments over material products**. It could enable a new generation of enlightened consumers who will **spend their money on products and services that provide a return on investment**. **To a certain extent, consumers will become investors**; this could spell the end of conspicuous consumption.

“

I'll be thinking from the point of view, "Oh, does this really hold any utility for me? Is it serving a purpose? Is it going to make my life easier?" And if it's not, then maybe I don't need it. So I think that that is also a very important perspective shift. And you won't want to spend your money on useless things when you literally spent the last six months trying to survive."

Aarman, Delhi

TRUE MATERIALISM WILL RISE

Quality over quantity is a mindset they'll apply to all of their purchases looking for a meaningful, intentional and sustainable consumption.

Keeping in mind that they'll evolve in a recession era and with limited financial opportunities, their budget won't be expandable, and price will limit their good intentions when it comes to consumption. **They'll expect brands to meet them halfway on the price tag.**



“

I used to think it would take 5 years for more people of my generation to consume like that but Covid accelerated it so much and now everyone around me wants to consume more ethically and sustainably."

Mariane, Paris

“

When I look to invest in brands that will appeal to Gen Z, they have to exhibit "three points of a triangle." Meaning, products have to be high quality, prices need to be competitive and it has to do good for the world."

Caitlin Strandberg, principal at Lerer Hippeau, whose portfolio includes Gen Z consumer brands such as Parade, Studs, Wave and Otherland

LOCAL AND IDENTITY BUYING WILL GAIN GROUNDS

Local consumption was something a lot of them were aspiring to before the pandemic. The crisis has helped them accelerate this and awaken them to their desire to support local businesses versus bigger corporations.

“

COVID has helped bringing small communities together in a way that the internet hasn't done in a long time. People are trying to make change within their communities that they can reach physically because COVID has impacted not only the ability to travel, but as it impacted small businesses, a lot more than other businesses and those businesses directly affects the people down the street from me. In a way, I think it's made things more disjointed on a global influence level, but on a small community level, it has made the world a lot tighter knit.”

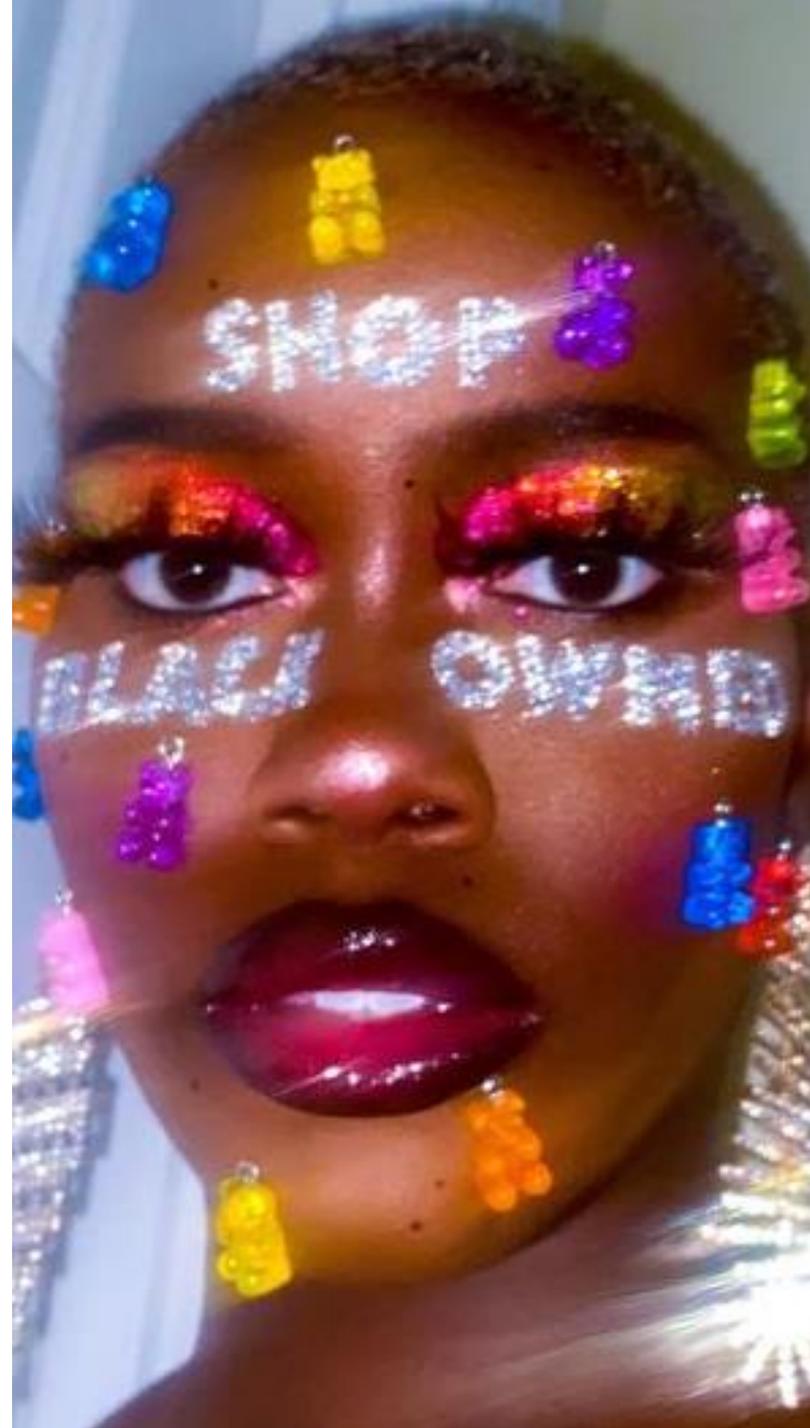
Thibault, LA

In addition, supporting people and businesses, from their direct communities or minority communities, through their consumption will expand for this generation post 2020. **The Black Lives Matter Movement has popularized the idea with #BuyBlack and new iterations of the concept are emerging.** Expect this relation to consumption to permeate other communities, not only in the US.

“

I try to go to a local bodega, because I'm in New York. I'll go to somebody who I know is Black. I'm like, "Okay, you own the store. Yes, this money is eventually going to go to that conglomerate, but at least it's going to you first. Even buying more from small businesses and from smaller brands. Like for example this shirt is from a friend of mine. This blanket is from another friend of mine. Just being intentional on let me give my money to my community.”

Nvallah, NY



75%

Of global Millennials and Gen Z say that as a result of the pandemic they will make an extra effort to patronize small local business in the future.^[1]

45 %

Of US Gen Z is more likely to shop at minority owned businesses than before the pandemic.^[2]

#Buyblack as of now has 1.9million posts on Instagram.

#supportsmallbusinesses count 20Mn posts as of now

In China, in the wake of the pandemic, **the popularity of domestic products or 国货 (Guohuo) has seen an increase,** while health conscious consumers have also embraced TCM (Traditional Chinese Medicine).

Sources: [1] The Deloitte Global Millennial Survey, 2020
[2] Morning Consult, Most Loved Brands Report, 2020

ON LOCAL AND COMMUNITY BUYING

“

If I'm going to be giving money to somebody, if I try to look into the history of certain companies and be like I'm not giving my money to these people because I know they just f*cked up. There's some stuff like that where I feel like I've been giving money in a very intentional way. Small businesses where I feel like they really just need it and also a lot of restaurants are closing right now. My favorite restaurants. But big brands I feel like if I'm giving money to big brands I don't know if I'm always... If it's always consciously relevant.”

Gozie LA

“

I was just happy to support them during Covid and now I'm committed to buying from my neighborhood independent businesses. I'm like big chains have enough money.”

Brandon, Paris

“

It's definitely more of I want to give my money where I know it will go, where I know it's needed. So no to Big Mamma (An Italian chain restaurant in France) but yes to the small pizzeria down my street.”

Charlotte Paris



Part 04

CONVIVIALITE IN THE NEW NORMAL



REAL LIFE SOCIAL NETWORKS WILL WIN

In the new normal, Gen Zers will be “hungry” for more live, face-to-face interaction. After several months of being at home, there is an “urgency to re-socialise” and a “craving” for out-of-home entertainment as long as these meet their expectations for safety and comfort, leading to small-scale and outdoor events to see growing interest from consumers, even if seems like this audience is not the most scared of getting back into crowds.

Having had time to rethink their relation to time and relationships, Gen Zers are more focused on their family and social circles

But most importantly they are looking to cultivate meaningful and connecting moment.

“

I don't really see the virtual thing is going to affect in the short-term future, because people we'll be tempted to go out these days. We just want to go out whenever we can. We want to be social.”

[Jerry, Hong Kong](#)

“

I'll just want to look at my friends' faces very intensely.”

[Pryanka, Mumbai](#)

48%

Of Brazilian Gen Zers say they will spend more time in person with friends and family.^[1]

44%

of people plan to return to cinemas, live music concerts, sports events and the theatre as soon as they possibly can.^[2]

Sources: [1] [Mintel](#) [2] [Warc](#)



BUT VIRTUAL TOGETHERNESS WILL TAKE OFF

If they are bound back post pandemic to cut off on these virtual connections some of the habits formed during lockdown will stick around. For instance, the BCG predict they will increase their use of at home virtual classes.

“*I think I'll still do Facetime calls and enjoy a glass of alcohol while talking to my friends.*”

[Pryanka, Mumbai](#)

“*For groups of friends who are, dispersed across the world and across time zones or even cities, this may become the new norm and I can see alcohol becoming a part of it, especially because you want something to make it special.*”

[Remi, LA](#)

Hybrids of IRL performance and remote attendance also stand to become a fixture of conviviality in the long run.

“*I do think that if travel becomes really expensive, I can imagine it becoming an option for promoters to have a local club or dance floor, and then have a DJ doing a DJ set remotely.*”

[Tina, Shanghai](#)

“*You are going to see for quite a long time a lot of blending the IRL and virtual performances. We are pushing that right now it's can't be about filming a performance anymore. We are looking for ways to make it more immersive and sensorial for the people participating digitally.*”

[Tom Wiltshire, Boiler Room](#)

\$210m

China's virtual idol market will grow from \$14m two years ago to an expected \$210m by 2023. [1]

70%- 1Mn

Over 70% of Kuaishou's content creators are under 30 years old and the number of daily active users of the livestreaming feature has reached 1 million. [2]

41%

Of Gen Zers say they plan to continue video calling more frequently after the outbreak. [3]

77%

of Gen Z believes virtual reality will see increased adoption in the next five years. [4]

Sources: [1] [Breaking Asia](#) [2] [Dao Insights](#) [3] [Global Web Index](#) [4] [The Center for Generational Kinetics](#)



AT HOME CONSUMPTION WILL DEVELOP

Day-to-day eating and drinking has become steadily streamlined with the pandemic. And the home has been redesigned as a space for alcohol consumption with new moments and new ways to consume.

Still cost oriented while ready to invest more in alcohol, this cohort will be more likely to splurge in at home consumption they can make profit on.

“
Because alcohol is becoming more intimate and more personal to us, I think we'll be consuming it more at home.”

[Joyce, Beijing](#)

“
If you are making it yourself at your house it's so much cheaper and so you can be more experimental, I'm probably not going to spend \$18 on a cocktail I don't know if I'm going to like, but I can play around at home with stuff I already have and check it out.”

[Remi, LA](#)

HOME ENTERTAINMENT

38%

At 38%, socializing at home with their friends is the second activity 18-21Y/O from 43 countries think they'll do more than before the pandemic.^[1]

“
I don't think I've seen any food or drink brands tapping into to fact that Gen Z likes cooking, I feel they ignore this cohort when it comes to entertaining people at home.”

[Holly Friend, The Future Laboratory](#)

“
I can see drinking at home becoming more normalized for our generation as the lockdown has created less separation between drinking at home and drinking in social situations because we had virtual drinking or drinking with your parents during the lockdown.”

[Amber Shangai](#)



INCLUSIVE EXCLUSIVITY WILL BE THEIR TEMPLATE FOR NIGHTLIFE

Communities powered moments of convivialité existed before the pandemic but after an eventful year of identity politics around the world and social isolation they will take a newfound importance and meaning leading to identity conviviality -or party to belong- taking off for this cohort.

They'll foster an inclusive exclusivity approach to conviviality in which small and independent collectives will lead the way and while inclusivity will reign, attendance will be limited to people in the known- which will mean people from close circles.

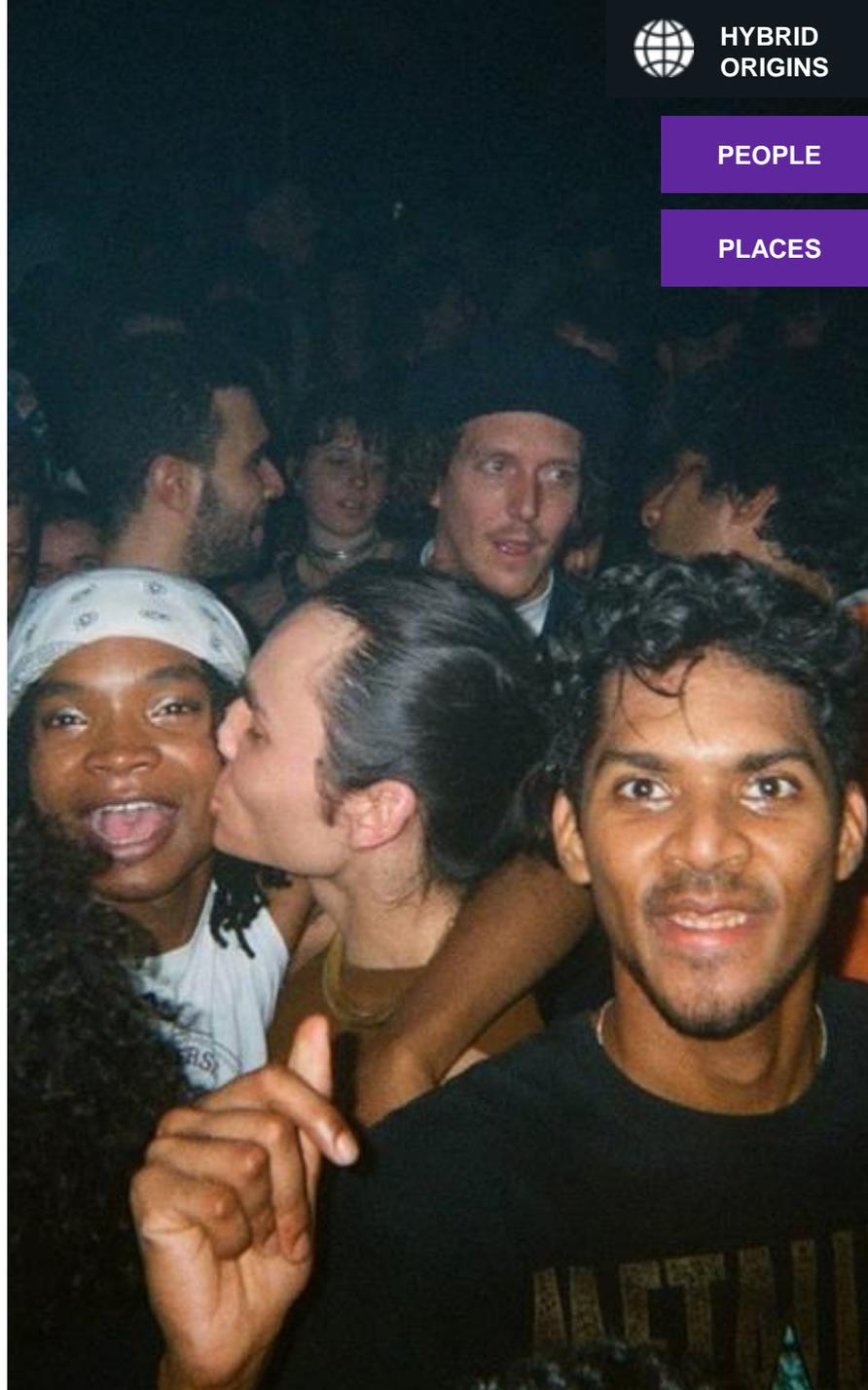
“*I do see myself going for more say LGBTQ+ related events or events surrounding my own community, which I didn't do before the pandemic. I want to feel a sense of belonging, so to speak. I do see that happening.”*

“*In the future, we'll probably continue to do the same stuff, but I think people will party more within their own community range.”*

[Jerry, Hong Kong](#)

DYI APPROACH TO GATHERING

Witnessed after lockdown free parties, open air and DYI nightlife will expand for a group who has always been used to get what they wanted by doing it by themselves. Switching from conventional locations they'll create new spaces to gather. **Brands will have to double up on cultural relevancy to keep up with emerging collectives created by this cohort.**



“*This idea of community and people putting greater emphasis on it from an entertainment or an art perspective. It's very needed now. People coming together as a community to further their ideas, and actions. This will expand further for sure.”*

[Balogun Aubee, Boiler Room](#)

“*We already had this DYI mentality, but this has definitely been exacerbated by the pandemic and the lack of opportunities, if we want to make something happen, we have to do it ourselves, and it applies to everything from **work to parties.**”*

[Brandon, Paris](#)

PARTY LOCAL PARTY SMALL WILL GROW

In the wake of 2020, their newfound to support local everything, will translate into convivialité. This need for more local will be accelerated by Gen Z's natural aversion for the mainstream and the more niche and subcultural the better in the New Normal. This could be the end of the globalisation of the music.

Small and intimate gatherings are what they'll dedicate more conviviality time to. While not letting go completely of bigger scale moments their need for meaningful connections and safe spaces whether for health concerns or in the figurative sense of being surrounded by familiar faces will enhance this need for small scale. Small festivals could cater to that cohort need for experience all while feeling part of a bigger experience

“

The more intimate form will rise post-pandemic because in so many ways for so many of us, when you're locked down in your home for half a year, connecting is the only thing that's getting you through it. And given its importance, you're not going to want to ditch it, once things go back to normal. I think that's one of the few long-term changes.”

[Sukhnidh , Mumbai](#)

“

We'll be looking for smaller parties or small venues . There's more emotions to it as well. Because whenever we have a small venue, people are so packed in it and we feel like we're all connected with each other'.”

[Jerry, Hong Kong](#)

After closing in May, Shanghai's underground Nightclub, Arkham, a venue popular with Gen-Z, and promoting international acts, reopened in July, under a new name – Zhai – with a focus on promoting creative culture that better supports the local community.^[1]

“

People are learning to build more appreciation for that local scene and being able to support local acts, rather than relying on the allure or the international arts coming into town. Before people would rather wait until like a big name comes to town to support that. But now it's like, "Okay, you can discover or appreciate the creatives and artists that are already in your city.”

[Amber, Shanghai](#)

Sources: [1] Mix Mag Asia



REAL-LIFE SOCIAL NETWORKS



HYBRID ORIGINS

PEOPLE

PLACES



THEY'LL MERGE SELF ACTUALIZATION AND CONVIVIALITY

Creativity-centric and self actualization moments that don't include partying will grow in importance in the way Gen Z will gather and socialize around alcohol.

“

We want to have more events that are not parties, like workshops sharing sessions or panels . Being able to have conversations and share skills will be as important as parties for us.”

[Amber, Shanghai](#)

“

I was just talking to a friend who works with art galleries and curating shows. And she was telling me how they're doing it in partnership with a few alcohol and snack brands, because as you're watching the food will be delivered to you. That's really interesting and it will probably grow.”

[Aditya Mumabi](#)

They'll be looking for safe places (whether IRL or in virtual spheres) where they can exchange ideas and culture with like minded people and be empowered.

“

My friend has been hosting biweekly poetry nights, and they've been global. There'll be people from Argentina, the US, and I believe Spain, and every week at the same time, they all come together, and they share poetry, all these poets from these different countries. I see that going on forever, it's something he's really passionate about, and wants to continue for a long time, and only continue to expand.”

[Remi, LA](#)



MOMENTS

PLACES

“

We want to do more of these workshops, giving them more opportunities, more access to skills.”

[Tom Wiltshire Boiler Room](#)

All in Shanghai, [Oil](#) in Shenzhen and ATP in Xiamen. Since the pandemic, these venues have diversified, becoming more than just clubs. All, for example, has operated as a marketplace for local designers, while another Shanghai venue - [44kw](#) - ran a [day/night festival](#) in the aftermath of the pandemic promoting arts/craft/photography and music. ^[1]

Sources: ^[1] Vice, Why Gen Z is Turning to Socialism

ON TRADE- FOSTERING INNOVATIVE CONVIVIALITY

While the rebound phase will be marked by familiarity and comfort of the places they know, the New Normal could be an opportunity for a new era of surprising, impromptu and much needed novelty.

THE SERENDIPIDITY ROUTE

“

While home consumption might rise, it will be under a lot of pressure. There will also be needs for third spaces, impromptu venues. As a brand if you can own this space that creates more serendipity, more secrecy this place where you can share with others and importantly breaks the routine that has been installed by this year. There will be a clamor for this, a potential for this Renaissance of the on-trade.”

[Richard Cope, Senior Trends Consultant, Mintel](#)

THE SLOW ROUTE

Gen Z being a mindful and health conscious cohort, there is room for a slower route towards conviviality given that self care will take even more importance for them post-pandemic.

“

This nightclub focusing on healing from LGBTQ+ community, they have this therapy room, letting people talk, meet and learn from other people. They have drawing areas make jewelery I was about all these other elements of play that were brought into this place not just about dancing, drinking etc...”

[Holly Friend, The Future Laboratory](#)



MOMENTS

PLACES

CONVIVIALITY PILLARS

People

- Like-minded communities
- Close social circles
- Local scene

CELEBRATION

Moments

- Virtual catch ups
- Self actualization time
- Culture centric moment

Places

- At Home
- Virtual spaces
- Hybrid Venues
- Free Spaces
- Low energy venues
- Pop up spaces
- Small festivals



Part 05

RELATION TO ALCOHOL



THEY'LL VIEW DRINKS AS A TOOL FOR CREATIVITY AND A SOCIAL EXPERIENCE

The lockdown has helped them formed a new relation to alcohol based on learning and experimenting. Drinking for the pleasure and the taste of it vs binge drinking will grow as they refine their tastes and include alcohol as a tool to enhance their creativity. Open to experiment and already a hybrid generation Gen Z will translate this into alcohol more naturally- willing more than before to develop new tastes and discover..

“
I'd say what will work post pandemic is DIY kits something you can bring home experiment with a couple of friends, have fun with it and make your own fancy drink.”

[Thibault, LA](#)

“
I was thinking if there were DIY kits that would be such fun and easy, but also interesting way to hang out with friends.”

[Joyce, Beijing](#)

DRINKING AS AN ACTIVITY IN AND OF ITSELF

They will growingly the process of making drinks as a social activity and a way to socialize.

“
I think when I'll have friends over, we'll be trying new cocktails, find recipes we could try. It won't be about drinking only but making it a fun sort of experience for the group socially.”

[Aaditya, Mumbai](#)

 AUGMENTED HOME ENTERTAINMENT

 HYBRID ORIGINS



60%

Around 60% of APAC Gen Zers are excited to experiment with new and unusual soft drink flavours [1]

“
I can't tell you of an alcohol brand that I think of as that is encouraging people to experiment and be creative and actively involve themselves with the creation process and making it their own. It's always just... The experience of drinking and getting drunk and whatever. But I like that "making drinks with friends" as an activity.”

[Megan, NY](#)

“
This desire to play around with drinks fits into that greater trend of slow consumption whether in terms of control of the drink itself but also in terms of budget control.”

[Richard Cope, Mintel](#)

THEY WON'T BE DRINKING MORE BUT THEY WILL BE WILLING TO SPEND MORE ON DRINKS

Alcohol like food and experiences are what they plan on splurging more on post-pandemic. Because the pandemic has helped them discover alcohol as a creative tool but also an activity, they'll be keener on spending more on drinking. **This upgrade is also linked to health concerns and the quest for more a more qualitative and moderate consumption.**

“

Coming of this I think *we'll* want to drink better alcohol move away from the cheap thing. Now *I'm* ok with spending more on food and alcohol, it makes me happier.”

[Zied, Paris](#)

“

In the long term I will be drinking at more spaced-out intervals but when I do drink, I would justify buying something a bit fancier, in the sense that, "Oh, instead of a cheap wine, maybe I'll go for a fancy Gin," or something like that. I see that happening.”

[Sukhnidh, Mumbai](#)

“

I won't need four spiked seltzers to have a good night. I could have two. And be fine. I'd rather have two really nice drinks, cocktails I put time into or like a nice glass of wine then four really cheap drinks that I only got for convenience's sake. I'm willing to put more effort into the drinks I'm consuming . I'm going to be drinking probably less quantity, but more quality.”

[Megan, NY](#)



SPLURGING MORE

250%

YOY increase in alcohol sales on [JD.com](#) amongst post-95 generation during this year's 618 festival. Tmall recorded a 170% YOY growth during the festival. ^[1]

Sources: [1] [Sohu](#)

THEY'LL LOOK FOR MORE QUALITY AND VALUE

In the age of recession they'll be going through alcohol is poised to become a luxury they are willing to invest in, but it has to pay back. Justification is key for this cohort, they'll want the exact explanation behind a price tag.

“

Quality over quantity was already strong among Gen Z but it is the trend you'll see accelerate post pandemic. In time like these if you are going to invest in something it better be really good and a really good quality experience.”

[Richard Cope, Mintel](#)

“

I'm not going to be drinking Smirnoff anymore. I'm not going to be drinking cheap college vodkas. I'm going to want to buy from brands that I trust, and at least are giving me the illusion of putting some effort and love into what they do.”

[Remi, LA](#)

Now that they'll be willing to spend more and that alcohol will be a more adult adjacent spending, aesthetics will matter.

“

For me it will be more about aesthetics, will it be beautiful to look at? Will you be proud to show it off, to give it as a gift to your friend?”

[Brandon, Paris](#)



CONSCIOUS
HEDONISM

“

And if I'm going to put this in my body, I'm going to make it count. I'm going to make it be good.”

“

I definitely have changed what I like to drink over the quarantine I was a big beer drinker beforehand. Because it was a great unit of inebriation. You could just count very easily, Oh, I've had two beers I've had three beers. But it was just making me fat. I was saying I've got to stop drinking beer. So I took a break from drinking beer, which has been great, but I think it's also given me a greater appreciation for, I guess, fancier forms of liquor and alcohol.”

[Thibault, LA](#)

ETHICS WILL TAKE CENTER STAGE

Sustainability is a no brainer for Gen Z, but they'll ask for an even more transparent and radical approach to it.

Additionally they'll push the envelope further in their expectations towards alcohol brands and include factors like workers condition, fair trade, or ethics of the people and companies they'll partner with.

“

I'll be expecting the same from my fashion brand than my alcohol brand. It's about ethics, how has it been made, by who, was this person paid fairly, is the bottle recycled are the ingredients good and sustainably made?"

[Charlotte, Paris](#)

“

If a bottle is 5 euros more than what I usually drink but it's better quality and it's good for the world then i'm in, I'll buy your bottle, as long as you are telling me exactly why it's qualitative and exactly how it's helping."

[Zied, Paris](#)

“

We talk about liking things that are better for the environment, ethical or local. I think it also translates to alcohol. If you know someone that makes their own liquor or whatever. You'll be more inclined to buy that."

[Thibault, LA](#)



CONSCIOUS
HEDONISM

“

The idea of ethical drinking, could sound ludicrous but it is something to consider. And if they wrap around their head to consume this way, they'll also influence their parents.

And brands will have to get at that level of forensics they'll expect from them . From the recycled bottle to if they pay their workers fair wages to using electrical delivery services or clean electricity if they do an event. It will be more and more about ticking all the boxes.

You'll always have to be 100% transparent with them.

And in the same vein, it's not too silly to start positioning your product as something that is carbon negative vs just guilt free like Brewdog is doing. This will also accelerate with this cohort."

[Ricard Cope, Senior Trends Consultant, Mintel](#)



THEY'LL NEED ALCOHOL BRANDS TO BE PERSONAL AND SUPPORTIVE

Supporting financially and creatively their favorite clubs, bars, projects, people linked to convivialité will be key to earn their trust and affection. In the same vein they want brands to help them affect change, they'll want alcohol brands **to help sustain and highlight their specific and local conviviality ecosystem.**

“

I've worked with brands like Absolut in Shanghai and I love that they support the underground scene that are more local than commercialized venues. But this support will be even more needed post-pandemic as it will get even harder to sustainable independent projects.”

[Amber, Shanghai](#)

“

We care more about people we know than big influencers or celebrities, even if it's a friend of a friend. So if a brand supports a project, a party an opening of someone we know to some extent we'll remember that brand and buy from it because it supported that person we know and want to see succeed.”

[Brandon, Paris](#)

“

I think a lot of these independent breweries that are trending in India right now collaborate with a lot of indie local artists. They're associating with all the right faces as they should. So in terms of appeal, it's definitely a bit niche but it's appealing to Gen Z.”

[Pryianka, Mumbai](#)

“

There is definitely going to be a desire for brands sponsoring the arts, promoting cultural initiatives that have been particularly hit by Covid.”

[Ricard Cope, Mintel](#)

“

I don't care when a large company sponsors a big event, but a large company sponsoring something more niche is way cooler because it's less expected, and it's more like, "Oh, they actually had to put in time. It's either based on maybe an employee's personal taste, or it's based off actual time, and energy to research this, because everyone knows that Coachella exists. If you sponsor Coachella, it's like whatever to me. But if you sponsor something like a series of late-night after-hours party, with deep cool DJs, or cool performers, that's way more interesting to me.”

[Remi, LA](#)

“

The biggest success in Seoul's nightlife scene was Jägermeister initiative where they partnered with DJ Peggy Gou to support the local scene and finance struggling clubs with a limited-edition bottle.”

[Eunhae Soe, Cakeshop Seoul](#)



ON SUPPORTING THE SMALL AND RELEVANT ONES

“

Now from a brand standpoint, it'd be really smart to get behind that early, make or sponsor small parties, that feel close, because with the communities getting tighter around the world, people are looking for that sense of exclusivity, “this is my thing, and I own it, and it's my feeling”. The pandemic, it's helping people go in that direction.

So if you wanted to get into people's heads, you should start sponsoring small things, right now, and make sure that the people feel like they're valued, seen, taken care of, so that when the world does go back to a place where it's normal, you have a foot hole, you have a place where people can trust you.”

Thibault, LA

“

I don't necessarily like Nike for what they produce, but I do really like how lately they've been supporting young people, and young artists, they've done a lot of maller collaborations with artists I know personally, so that's been really cool to see, and exciting to see them supporting someone who's not big... It's always col when they do a collaboration with Serena Williams, or a major athlete, but it's also really cool to see them doing something with Art Hoe collective, which is this small, women of color, people of color art collective, so that was really exciting, they did have launch parties that were small, and you got to be invited to them.”

Remi, LA

“

I haven't worn Vans in years, but they put out a campaign in which they supported these, small DIY venues across the US. These aren't even the mi-size venues that everybody knows, these are the really small places that only small communities know. They would take a special motif from the designs of the places. They put that design on shoes, and all the proceeds are going to these DIY venues that are at the risk of closing because of COVID. I don't even wear Vans, but I wanted to buy those shoes so badly. Just how impressed I was at a national brand, looking at these really small places, and uplifting them, I can't even begin to express my respect, and how much I love that they went for the small people, the small guys, it's the best.”

Megan, NY

BUT ALSO CURATORS AND TEACHERS

CURATE AND ENHANCE ACCESS TO CULTURE

The democratization of access, as a result of lockdown forcing events and experiences online, has offered brands the crucial opportunity to nurture more diverse creativity and discovery. **Going forward, maintaining this bond with this cohort will be essential as they'll expect alcohol brands to be cultural enablers and curators. From the conventional creative scene to the more niche Gen Z will growingly expect to have access to the culture (IRL or online) though our brands**

“

I'll remember Chivas just because with their event I got to have access to artists I had never seen before and that's what we want these brands to contribute to.”

[Zied, Paris](#)

“

And it can be letting someone curate for them- someone that feels relevant to me or my community. Like if a brand let Tyler the Creator curate something or gave him a platform to share what he is watching, reading, etc.. I'm like yes this brand gets me.”

[Charlotte, Paris](#)

ENABLING SELF ACTUALIZATION

Self actualization will remain one of Gen Z's key drivers. In the New Normal, their quest for knowledge and upskilling will also be applied to the alcohol sphere.

But alcohol brands won't have to be limited to their own industry and **this helping hand in self actualization could be extended by partnering with talents from the creative, music, or nightlife scene. Championing young talents in a post-pandemic world where opportunities are scarce will also be part of brands route to Gen Z in the New Normal.**

Havana
Club

BY

H
O
N
Y

Z
U
K
A

PLAYLIST #16



THEY'LL BE ASKING FOR MORE AWARENESS

After a few months of renewed alcohol stigmatization and while they are developing a creative and meaningful relation with alcohol, this controlling and moderate cohort won't lose sight of the potential downsides of alcohol. Going forward outreach will have to be communicated more effectively to this cohort.

“

They know people will always buy alcohol and they don't necessarily do as much effort in either outreach or campaigns to understand how to properly consume alcohol or how to properly engage with it.”

Tibault, LA

“

It could be really cool if alcohol brands found ways to combat different things that are relating to alcoholism. Like obviously you're not going to make a commercial about an alcoholic but thinking about for example, we talk a lot about assault, and things like that. Finding ways to maybe talk about real issues while also advertising your brands. But also at the same time doing that work and practicing it behind the scenes it's easy to tell when brands are being authentic or not.”

“

The negative connotations of alcohol and overconsumption was something this generation was very aware, and it has been strengthened by the crisis and the lockdown phase with much more coverage of the topic.”

Richard Cope, Mintel



Part 06

**IMPLICATIONS FOR
PERNOD RICARD**

NAVIGATING THEIR SPECIFICITIES

FOSTERING MORE UNITY



There is an opportunity for brands to act as connectors of this cohort who will be looking to band together to affect the change they want to see.

Creating a positive narrative that will help them project into better days.

If choosing that route, the challenges will be multiple notably because of the natural defiance they have towards corporations and older people and the important fact that Gen Z doesn't like to be told what to do or being preached to.

WHILE BEING CONSCIOUS YOU CAN'T WIN THEM ALL



While they might crave more unity, they will still belong to specific communities who will growingly become polarized as a result of 2020.

Therefore knowing your audience and its values affiliation will be crucial as it will be near impossible to talk to all of them.

As much as they consume mainstream content and follow trends, this cohort is adamant about the niche, the specific.

CELEBRATING LOCAL



Businesses seeking to expand their connections with Gen Z will need to localize their marketing to cater to the specificities of their communities, local references and cultural appreciation.

Cultural relevancy in the context of a global power shift and an alienation from Western hegemony will be mandatory.

See : [Ikea](#) and [Apple](#) cultural winks upon their launches in India.

[Nike](#) and their specific Instagram by [cities](#) also their retail footprint matching local habits

CULTURE, CULTURE, CULTURE

PARTNERING UP



For Gen Z to be willing to support a brand they must be able to feel seen and understood. This in the case of this generation will mostly happen through partnering with individuals, collectives or they can relate to and feel relevant to them- niche or not.

AMPLIFYING THE CULTURE



As a generation defined by its attachment to all things creative but also the hype generation that is interested by cultural relevancy more than product relevancy- supporting the creative scene is expected from alcohol brands

In the wake of the BLM movement that has asked brands to elevate Black culture vs solely making profit off it, Gen Z will ask us to do the same when it comes to all things cultural or creative.

CREATING THE ZEITGIST



Whether a viral trend, an event bringing novelty, an unexpected collaboration, brands are increasingly expected to contribute to pop culture and there is still room for that role in the New Normal as this cohort will prioritize creating memorable moments over being materialistic.

See: [Travis Scott x McDonalds](#)

THERE WILL BE LITTLE ROOM FOR HALF HEARTED COMMITMENT

SHOWCASING ACCOUNTABILITY



In the era of backlash and call out we are entering, and doesn't look to be slowing down, accountability is what Gen Z will expect from brands whether they have faulted in their eyes or not. Acknowledging what was done wrong or not in the best way (on any given topic) and laying out a detailed plan of effective actions put in place will have to be communicated clearly to this cohort.

We are moving from the time of purpose-oriented brands and marketing to the era of accountable brands.

Remembering that Gen Z doesn't let itself being fooled easily any commitment taken needs to be in the long haul, they see-through one-shot opportunities.

See: [Ben & Jerry's implication in the BLM movement](#)

RADICAL TRANSPARENCY



Keeping in mind that they are masterminds at looking behind the scene and finding information, transparency will have to be total when committing to any topic

Remember they are a cynical bunch you'll have to convince. Information is key and it needs to be delivered simply yet effectively.

SUPPORTING THE SMALLER ONES



Supporting the ones hit the hardest by the crises of 2020 can not be limited to the short term to gain the trust and affection from this group.

Remember that when they talk about the small ones it doesn't stop at local it's also about minorities.

Just like they want to see long term commitment from corporations on societal topics, they expect them to extend their philanthropy in time.

CREATING OR SUPPORTING THEIR SPACES

FOSTERING INCLUSIVE EXCLUSIVITY



As communities' bonds will grow in importance for this cohort and the need for more exclusive experiences will rise parallelly, connecting the two will be a relevant way to earn their affection.

Think spaces, events, products and retail experiences that are open to all but hidden away from public view and social media so that only those in the know can find them.

See: Streetwear brand [Bodega's](#) LA store, hidden away, it's situated behind a fruit packing warehouse in the Produce District

Oldie but goodie : [Nike releasing their collaboration with Martin Rose on Craigslist](#)

REAL LIFE SELF ACTUALIZATION



Self actualization and conviviality moments will increasingly merge opening the door for our brands to offer them spaces that will help facilitate these moments either by creating them ourselves or supporting the initiatives that this cohort will have put together.

SERENDIPITY AND CREATING SURPRISE



Creating new moments, new places new spaces and bringing back serendipity in their algorithmic centric life, will be very needed to offer to this cohort the opportunity to break down from the heavy routine and intense environment created by 2020.

Keeping in mind that these spaces can exist in the virtual sphere, as this space is expected to intensify in the long haul.

FACILITATE THEIR NEW RELATION TO ALCOHOL

ENCOURAGING CREATIVITY



Whether through content production, moments or product innovation that will enable them to play with drinks, there is a new opportunity for our brands to connect with one core marker of Gen Z : their creativity.

PREMIUM CAN WORK WITH THEM TOO



All of them won't be completely and exclusively to premium options but there will be a growing interest for premium products and experiences for a cohort who is growing up and will likely devote their leisure budget on meaningful and shareable moments.

GETTING INTO ETHICAL DRINKS



Gen Z will always be more radical, and purpose driven than any other generations. And it's not likely to change as they get older.

The fact is they are growingly connecting the dots and looking at a corporations from all standpoints.

As ethics is starting to be a notion they integrate more in their vocabulary and frame of thinking, it should be taken seriously and acted upon when it comes to our industry.



CONSUMER
INSIGHTS
PARTNERS

CONSUMER CENTRIC
FUTURE READY

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