

Meet gen z: the social generation.

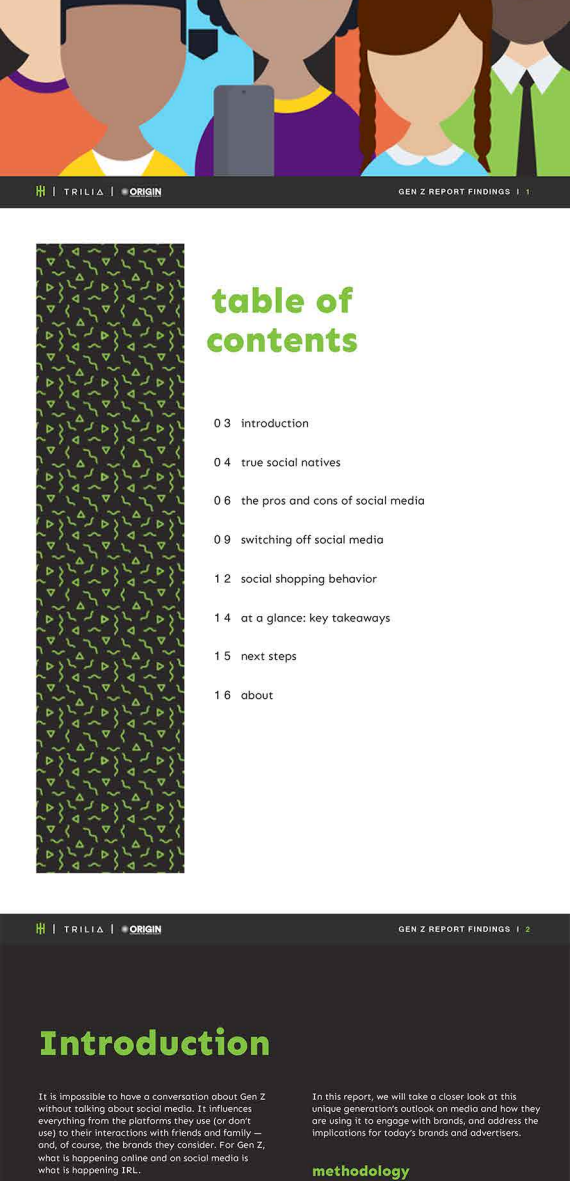


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Introduction

It is impossible to have a conversation about Gen Z without talking about social media. It influences everything from the platforms they use (or don't use) to their interactions with friends and family — and, of course, the brands they consider. For Gen Z, who is happening online and on social media, what is happening IRL...

Born 1994 and later, Gen Z is the first true generation of "social natives." They have been the subject of study mostly revolving around always-on media consumption, but less has been written about the important social media they use. Gen Z's emotional outlook and shopper behavior. Is it true that Gen Z is seeking relief from social media? How do they interact with brands? Do paid social advertisements really motivate purchase behavior?

To answer these questions, we, along with our in-house research arm, Origin, are digging a little deeper to examine the social profile of Gen Z. Especially because we're seeing one significant shift: By 2025, it is expected that our consumers will be Gen Z.

In this report, we will take a closer look at this unique generation's outlook on media and how they are using it to engage with brands, and address the implications for today's brands and advertisers.

methodology
This report is based on the findings of research conducted by Origin with Hill Holliday's in-house research arm. To conduct this research, Origin surveyed over 1,000 Gen Z consumers between the age of 18 and 24 across the U.S., including a broad range of demographic indicators. Data was collected in December of 2017.

True social natives

When we look at Gen Z's near-constant engagement with smart devices, the message is clear: It's the social media platforms on smartphones that dominate their attention. And for all of this generation, social media blurs the line between the real world and the virtual world.

91% of Gen Z Adults Use Social Media



social platforms ranked by usage by generation z

To provide a look at the social platforms they're spending time, we asked survey respondents to share the ones they currently use. Their time is mostly split between social media platforms Instagram, Snapchat, and Facebook, and less so between Pinterest, Whatsapp, and Tumblr.

For brands, this means increasing or shifting media content to reflect the Gen Z audience.

The pros and cons of social media

Social media has made it incredibly easy to connect with the world. One can check Instagram and see what their best friend is up to, log onto Snapchat to share their day, or post on social media their opinion. Conversely with their favorite YouTube celebrity. But for Gen Z, is this information overload a cause for concern? Our research shows that while all is not roses, brands appear there.

Our survey found that 77% of Gen Z reports that social media provides more benefits than drawbacks to their own life. But a closer look at the survey results reflects a different perspective — 41% of Gen Z social media users report that social media has made them feel anxious, sad, or depressed.



41% say social media makes them feel sad, anxious, or depressed

negative
22% say people they age are too distracted by social media
29% say social media has hurt their self-esteem or self-confidence
72% say social media reminds me of myself

positive
71% say social media has a positive impact on friendships
61% say social media has a positive impact on self-confidence
66% say social media makes it easier to connect with people

"Social media reminds me of myself... it's like I'm being ignored or just not a priority to people."

"Social media makes me feel happy when I see photos of my friends... it's like I'm seeing people thriving. When I post with someone from my past."

benefits of social media among social media users
3% Very Negative, 4% Somewhat Negative, 22% Neutral/No Effect, 31% Somewhat Positive, 31% Very Positive, 1% Prefer Not to Answer. 62% say it has a positive impact on overall happiness.

the bottom line for brands
Build Relationships Through The Good, and The Bad.
Brands can't be one-deaf to the negative social media experience had by younger consumers, but this doesn't mean they have to riposte around the issue. Brands can capitalize on and further facilitate what social media does best: connecting people. On the flip side, brands can also address social media's shortcomings—like pushing people to the fringe or fostering insecurity—in a way that offers some respite for their consumers.

drawbacks of social media among social media users
20% Green, 48% Somewhat, 32% Rarely, 2% Prefer Not to Answer. 68% say social media sometimes or often makes them feel sad, anxious, or depressed.

Represent Your Audience
Gen Z consumers want to see themselves represented in branded social media content. They have an opportunity to balance out the environment of social media on an authentic source of relief to users. This starts with a social strategy that acts in the best interest of consumers through thoughtful platform, influencer, and content selection.

Don't Limit Your Presence
With social media, Gen Z isn't just using one (or two or three) platforms; there are a host of social platforms that are looking up their time. Social media users have taken a temporary break from social media platforms like Facebook or Instagram. Brands that extend their social media strategy to offer a mix of content across multiple platforms create an opportunity to share their brand story uninterrupted.

Invest in Relevance Over Reach
While reach has ruled media buys for decades, the same cannot be said for today's social media landscape. Organic reach has fallen so low for social media that it is less viable channel for reaching Gen Z. On the flip side, it has become one of the best channels for delivering one-to-one, one-to-one branded content. Today's approach to social media is about engagement and conversation — not simply about reach and frequency — and a brand's investment in paid social should reflect this.

Social shopping behavior

Z Gen Z grew up in the age of photo sharing, "selfie" taking, and real-time storytelling. Most recently, they have entered the age of social media shopping. Consider this: our survey found that 65% of Gen Z social media users follow brands on social media. Now factor in that 75% of those who do follow brands report that they do so to find special deals or promotions. The image of a social media shopper begins to form.

Still, while Gen Z is 4.1 times more likely to convert on social media than Millennials, not all are putting their money where their mouth is. Only 43% of Gen Z social media users have purchased a product directly through social media.



At a glance: key takeaways

Of all the media trends, few have had a larger impact on the Gen Z demographic than social media. The findings from our study emphasize that, as with almost everything in life, there is a light and dark side to social media. It's not surprising that this generation is connected to social media, but our data demonstrates how their connectedness can manifest stress, anxiety, and other negative emotions. Considering this, brands cannot afford to ignore the emotional impact of social media on its Gen Z users. Brands should act now and invest in a social media strategy that offers a mix of needed light of relief to users while also moving the needle on brand presence and engagement. Here are some bottom-line take-aways that should be considered by brands who are ready to reach Gen Z.

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Have a Social Mindset
It is imperative that brands adopt a social mindset, due to the overwhelming popularity of social media. Brands simply need to go where their customers are, whether that be on social media, while only 22% of Gen Z social media users report they consume content via traditional TV.

Be a Valuable Information Outlet
Gen Z is turning to social media not only to research, but also to purchase products. Brands that are a reliable source of product information and stay true to their roots on social media will be well-positioned to engage Gen Z.

Build Relationships Through The Good, and The Bad.
Brands cannot be one-deaf to the negative social media experience had by younger consumers, but this doesn't mean they have to riposte around the issue. Brands can capitalize on and further facilitate what social media does best: connecting people. On the flip side, brands can also address social media's shortcomings—like pushing people to the fringe or fostering insecurity—in a way that offers some respite for their consumers.

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Make A Positive Brand Experience A Priority
While brands aren't responsible for the happiness of Gen Z, they do have an opportunity to balance out the environment of social media on an authentic source of relief to users. This starts with a social strategy that acts in the best interest of consumers through thoughtful platform, influencer, and content selection.

Tap Into Pop Culture
Pop culture events and trends can present a huge opportunity for brands to be immersed in real-time conversations with Gen Z — provided you take their claims early. To find new and inspiring ways to connect with this, brands like Nike and Adidas are quick to start conversations surrounding pop culture trends, and according to our survey, Gen Z social media users have taken notice.

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Next steps

So what does this all mean for marketers and their brands? For one, a renewed look at social media marketing may be in order. For instance, brands that target teenagers, college students, and young adults may need to rethink what it means to connect with their target audience on social media and elsewhere. In other cases, brands may need to reevaluate their content that both engages and motivates the consumer to buy. The good news: Gen Z is demonstrating their expectations and preferences online consistently; the data simply needs to be entered in a way that can be acted upon. We hope this report can help.

No matter the brand's category, Gen Z will likely be among its key customers. We urge Gen Z, if you'd love to "get" this growing audience also, we'd love to hear from you.

to view more content on Gen Z, visit genz.hill.com

For more information on this study or to conduct a brand or consumer study of your own contact our head of research, Dr. Kenneth Foro, at kforo@hill.com.

About

Fighting the daily share battle in the hottest categories, it's what we do. Hill Holliday is proud to be one of the top creative marketing agencies in the country with over 800 employees across our network. Since 1968 we've built our business on winning that daily share battle for our clients: the hottest and most competitive categories. Blending superior creative, media and technology, we deliver game-changing ideas for industry leaders like Bank of America, Dunkin' Donuts, Planet Fitness, Renner Party International, Calvin Klein, Sassy City, Great Wolf Lodge, Capital University, Nordstrom, and Johnson & Johnson, Smucker's, and White Wawa. For more about our people, our work, and our culture, please visit <http://www.hill.com>.

Origin is Hill Holliday's research and analytics team specializing in strategic brand and consumer research for leading brands across the US. We work at the intersection of brand and consumer experience with a focus on uncovering actionable insight using qualitative and quantitative research. Capabilities include shop-alongs, user-experience mapping, consumer sentiment, and more. We've got you covered. For more information, please contact kforo@hill.com.

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