Say Hello to the Snapchat Generation

The Real Story in Europe
Who is the Snapchat Generation?
How do they Communicate?
How do they Spend?
How do they Relate?
How do they Play?

05
18
27
35
42
From an early age, the Snapchat Generation has stepped up to be the change makers they believe the world needs. They harness their creativity, empathy and the digital tools at their command to make an impact on the causes and issues that matter to them.

The Snapchat Generation expects to have a two-way relationship with their favorite brands. Brands who share their origin stories, secrets to their success and align themselves with this generation’s social causes will be rewarded with loyalty and an eagerness to show their approval by showcasing the brand’s logo.

The pressure to excel, combined with a heaviness of the world in which they have come of age, has this cohort more stressed than prior generations. They respond by seeking out moments of levity and have a strong desire to bring fun back into their everyday. This need for laughter and silliness will continue into their future as a tool to keep them recharged.

As a result of the pandemic, the Snapchat Generation has a renewed appreciation for friends and family and will carry this deep need for connection through as a defining characteristic.
In Europe, a globally aware generation that values inclusion

The Snapchat Generation in Europe keeps their finger on the pulse of world events and are uniquely comfortable talking about uncomfortable (taboo) topics. As a result, the Snapchat generation in Europe sees themselves as kind and inclusive—more so than non-Snapchatters.

While global in their affinities, the markets in Europe are also diverse. France rises above the rest of Europe in describing themselves as book smart and street smart. In Germany, there is a strong focus on school and hard work. In fact, the Snapchat Generation in Germany is more stressed about school/work than they are about the pandemic. Caring for the causes that are important to me emerges as the top descriptor for the Snapchat Generation in Norway. They also report the highest rate of volunteerism in Europe. In Italy and Spain, the Snapchat Generation is the most tech-forward in Europe, embracing gaming and new technologies. They are also the most likely to describe themselves as creative. Independent and hard working are top descriptors for the Snapchat Generation in the UK and the Netherlands.
Who is the Snapchat Generation?
Our generation is:

"Adaptable, Optimistic, Resilient."

— Alejo, a member of the Snapchat Generation, age 21, Spain
They value inclusivity.

8 out of 10 in the Snapchat Generation say being inclusive describes them and are more likely than non-Snapchatters to say they and their friends are inclusive of people who are different. In Europe, the Snapchat Generation living in France (83%) were the most likely to say this while those living in the Netherlands (73%) were the least likely.

They are wise & worldly.

8 out of 10 say they are informed about world events and news. They are 25% more likely than non-Snapchatters to say that they volunteer. They give back through charity and roll up their sleeves to drive social change.

They are real & playful.

7 out of 10 in the Snapchat Generation say they want their online image to represent the “real me” (25% more likely to say this than non-Snapchatters). Yet, the Snapchat Generation is playful when it comes to their online presence, they are almost 2X as likely as non-Snapchatters to say they usually edit or use a filter on photos of themselves as they see this as an expression of their creativity.
The Snapchat Generation is multi-dimensional

This generation is multi-faceted, and take a much more holistic and nuanced view of how they define themselves, from the music they listen to, to the influencers they follow. They see being kind as cool, as is working hard and expressing their creativity.

The Snapchat Generation is more likely than both non-Snapchatters and older generations to agree that all of these are key aspects of their personality.

“Music I listen to” was the top descriptor among The Snapchat Generation across every country except Norway where it was #2. In Norway, the “causes I care about” rose to the top and 70% say that they volunteer vs. 46% for Europe as a whole.
In Europe, the Snapchat Generation is most likely to view themselves as both kind and informed about what’s going on in the world.

These self descriptors are consistent across Europe in every country except France where “book smart” and “street smart” claim the top 2 spots.

9 out of 10 in the Snapchat Generation describe themselves and their friends as **kind**.

8 out of 10 say they are informed about world events/news.
I want to be ME

This generation doesn’t have the time to be fake. They want to be recognized, seen, and heard for who they truly are and they want their presence on digital media to reflect their true selves.

The Snapchat Generation in Italy were the mostly likely to agree with both of these statements about authenticity.

8 in 10 say ‘It’s important to me to be true to myself’
8 out of 10 in the Snapchat Generation in Europe agree,

“"It’s important to me to form my own opinions (i.e., without the influence of others)""
A drive to excel

From an early age, The Snapchat Generation was raised to work hard and taught the value of grit and determination. Seeing themselves as both street and book smart, along with a competitive streak, the Snapchat Generation is driven to be significant.

Members of the Snapchat Generation in France were most likely to describe themselves as book smart (89%) and street smart (85%) where in Germany and Norway, they were least likely to define themselves as being street smart (37% and 42%, respectively) or competitive (45% and 34%, respectively).

Self and Friend Descriptors

Completely/Somewhat Agree Summary

- We are book smart
  - Snapchat Generation: 59%
  - Non-Snapchatters: 65%

- We are street smart
  - Snapchat Generation: 56%
  - Non-Snapchatters: 64%

- We are competitive
  - Snapchat Generation: 43%
  - Non-Snapchatters: 61%

2021 Global Cassandra Study commissioned by Snap Inc. | Base: Europe Total N=11,502 respondents | Q: How much do you agree or disagree that the below statements apply to you and your friends?
In Europe, The Snapchat Generation is 1.25 times more likely to volunteer than non-Snapchatters

As the Snapchat Generation in Europe define themselves as being kind, informed about world news/events and hard working, it is no surprise that they are more likely to volunteer than non-Snapchatters. They have high expectations on themselves to help make the world a better place.

More than 70% report ‘We Volunteer’ in Norway
But at what cost?

Stress.

The pressures to excel and change the world, coupled with the world they are living in (social injustice, political division, terrorism, climate change, and now a pandemic) inevitably lead this generation to be stressed out.
63% of the Snapchat Generation feels stress on a weekly or daily basis (v. 52% for non-Snapchatters)

The Snapchat Generation in Spain (73%) and Italy (69%) were the most likely to state that Covid-19/the pandemic caused them stress, not surprising given how hard hit both countries were by the virus.

### TOP CAUSES OF STRESS

<table>
<thead>
<tr>
<th>Rank</th>
<th>Cause</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>Covid-19/the pandemic</td>
<td>61%</td>
</tr>
<tr>
<td>#2</td>
<td>School/work</td>
<td>53%</td>
</tr>
<tr>
<td>#3</td>
<td>Money</td>
<td>49%</td>
</tr>
<tr>
<td>#4</td>
<td>Not getting enough sleep</td>
<td>45%</td>
</tr>
<tr>
<td>#5</td>
<td>My weight</td>
<td>33%</td>
</tr>
</tbody>
</table>
Even with all the stressors in their lives and after an extraordinarily difficult year all around the globe, this generation is feeling more:

- **Hopeful** (1.6x vs. non-Snapchatters)
- **Happy** (2x vs. non-Snapchatters)
- **Excited** (1.9x vs. non-Snapchatters)
- **Fulfilled** (1.8x vs. non-Snapchatters)

The Snapchat Generation in France was the most likely to express these hopeful, happy, and fulfilled feelings.
The Snapchat Generation in Europe is moving through life with determination and optimism.

- **8 in 10** say they feel like they have control over their lives.
- **7 in 10** are confident that they can make it through life on their own.
- **3 in 4** feel optimistic as they work to build a better world and a personally fulfilling life for themselves.

2021 Global Cassandra Study commissioned by Snap Inc. | Base: Europe Total N=11,502 respondents Q: How much control do you feel you have over your life? Please select one. Q: How much do you agree or disagree with each of the statements below? Please select one. Completely/Somewhat Agree Summary
How do they communicate?
“[Our generation] forms a bridge between previous and future generations in a new era of technological progress and global change.”

—Annick, a member of the Snapchat Generation, age 22, Netherlands
1 in 2 of the Snapchat Generation in Europe feel digital platforms connect them with others

1.5x more likely than Non-Snapchatters
In Europe, the Snapchat Generation is comfortable having uncomfortable conversations.

When it comes to discussing “taboo” topics, all countries in Europe are the very open to talking about them with their friends.

<table>
<thead>
<tr>
<th>Countries Most Open to Discussing vs. Least Open</th>
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<tbody>
<tr>
<td><strong>Least Open</strong></td>
</tr>
<tr>
<td>Indonesia 61%</td>
</tr>
<tr>
<td>Saudi Arabia 72%</td>
</tr>
<tr>
<td>UAE 78%</td>
</tr>
<tr>
<td>Malaysia 53%</td>
</tr>
<tr>
<td>Brazil 76%</td>
</tr>
</tbody>
</table>
Digital tools

In Europe, the Snapchat Generation feels significantly more empowered than Non-Snapchatters to change the world through online, digital communication which helps fuel their drive for activism and volunteerism. They know that such tools enable them to rally large numbers of people who share in their collective thinking, and in turn lead to a better world offline.

The Snapchat Generation in Spain is the most likely to agree with these statements.

![Chart showing comparison between Snapchat Generation and Non-Snapchatters on two statements:]
- My generation has the power to change the world through digital media (e.g., social, communication, and/or camera apps)
  - Snapchat Generation: 52%
  - Non-Snapchatters: 26%
- I believe that powerful social movements can happen online (e.g., on social, communication, and/or camera apps)
  - Snapchat Generation: 44%
  - Non-Snapchatters: 28%

2021 Global Cassandra Study commissioned by Snap Inc. | Base: Europe Total N=11,502 respondents
Q: Which of the following, if any, are true for you? Select all that apply.
The Snapchat Generation is 1.4x more likely than non-Snapchatters to agree that their actions can make a difference.

And they put their money where their mouth is. Across Europe, the Snapchat Generation reports that they are contributing more to charity now than in the past.
An Opportunity:
They could use help figuring out where to focus their efforts as many feel overwhelmed by the number of social issues that need to be addressed.

1 in 3 Snapchat Generation users say ‘I am overwhelmed by the number of social issues that need to be addressed’
The Snapchat Generation is 150% more likely to prefer to communicate with pictures over words than non-Snapchatters.

2021 Global Cassandra Study commissioned by Snap Inc. | Base: Total N=11,502 respondents
Q: What portion of your digital communication includes images and media (e.g., emojis, photos, memes, video calls) versus text only (i.e., only words)? Please enter a percentage for each, your total must add up to 100%. If you do not communicate in one of these ways, please enter zero.
Q: Please place the following items in order of those you use the most to those you use the least in your digital communication.

### TOP 5 ITEMS USED IN DIGITAL COMMUNICATIONS

<table>
<thead>
<tr>
<th>Rank</th>
<th>Item</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>Photos</td>
<td>81%</td>
</tr>
<tr>
<td>#2</td>
<td>Emojis/Emoticons</td>
<td>76%</td>
</tr>
<tr>
<td>#3</td>
<td>Videos/Video Messages</td>
<td>61%</td>
</tr>
<tr>
<td>#4</td>
<td>Video Calls</td>
<td>60%</td>
</tr>
<tr>
<td>#5</td>
<td>Memes</td>
<td>56%</td>
</tr>
</tbody>
</table>
1 in 2 of the Snapchat Generation say they are less likely to buy from a brand that chooses to promote the opposite side on social issues that matter to them

+9 pts from Non-Snapchatters
How do they spend?
Let’s Get Spending

Discretionary spending power for the Snapchat Generation reaches a whopping $1.05 trillion across Europe.

By country:
France: 272 Billion Euros
Germany: 171 Billion Euros
Spain: 35 Billion Euros
Italy: 50 Billion Euros
Netherlands: 56 Billion Euros
Norway: 644 Billion Krone
UK: 195 Billion Pounds

2021 Global Cassandra Study commissioned by Snap Inc. | Base: Those with a monthly income N=5,978 respondents. Cumulative total of average by market. Spending power for the Snapchat Generation was calculated as follows: We obtained the average monthly income for each respondent. The sum of any expenses related to rent or mortgage, debt, insurance, medical expenses/healthcare, spending money given to others, and utilities was subtracted from this average monthly income. We then multiplied each respondent’s average monthly discretionary spending by 12 to obtain their average yearly discretionary spending and averaged these results within each country across the Snapchat Generation.
In Europe, the Snapchat Generation is willing to outspend non-Snapchatters across every category.

Across the board, the Snapchat Generation is willing to spend more of their money on discretionary items than non-Snapchatters.
The Snapchat Generation in Europe has a highly entrepreneurial spirit and already strives for financial independence

1 in 2 say they want to be self-employed vs. 2 in 5 for older generations

8 in 10 say it is important to be financially independent

"I also enjoy buying and selling clothes and sneakers. I do this through monitoring drops of highly limited and highly sort after streetwear items that I then go on to sell for a premium price in the secondary market."

–Sam, 18, UK
Brands have an opportunity to connect with the Snapchat Generation

Because they are so entrepreneurial themselves, they want to hear the origin stories and compelling background stories about the founders of their favorite brands. Those living in Italy (57%) and Spain (53%) find these backstories most compelling.

Brands who establish this two way relationship may be rewarded with loyalty.

2 in 5 say they like to learn the backstory of brands & products that they buy vs. 1 in 3 for non-Snapchatters.

2021 Global Cassandra Study commissioned by Snap Inc. | Base: Europe Total N=11,502 respondents | Q: How much do you agree or disagree with each of the statements below? Completely/Somewhat Agree
The Snapchat Generation will show that loyalty by showcasing their favorite brands’ logos.

The Snapchat Generation is more likely than non-Snapchatters to…

- Agree that they like to have clothes and accessories that have brand logos on them (+20 pts)
- Say wearing brand logos helps me show my personal identity (+17 pts)
- Say it is important to me to have brand name items (+15 pts)
- Say wearing brand logos means that I agree with what the brand stands for (+13 pts)
- Prefer distinct, recognizable items (e.g., a t-shirt with a logo on it) (+13 pts)
The Snapchat Generation favors big and small brands almost evenly.

48% agree with Big Brands

52% agree with Small Brands
Next Gen Shopping: Leading on Using Augmented Reality

In Europe, the Snapchat Generation is 4x more likely than non-Snapchatters to say they are using AR to try on products more than they did one year ago.

The Snapchat Generation in Italy is especially engaged with AR.
How do they relate?
The Snapchat Generation places tremendous value on their relationships with family and friends and communication/camera apps are key to keeping those relationships strong.

Top 3 things the Snapchat Generation can’t go a day without...

1. Going on social, communication/camera app
2. Talking to my parents/family
3. Talking to my friends
The value they place on those relationships has only grown stronger since the pandemic...
#1 Reason the Snapchat Generation uses Snapchat is to stay connected with friends.

“In the UK, we weren’t allowed to see anyone for so long…and for me, what makes me happiest now is going out and seeing my friends.”

—Sam, a member of the Snapchat Generation, age 18, UK
The Snapchat Generation will emerge from the pandemic with a stronger appreciation of family

The Snapchat Generation is 1.3 times more likely than non-Snapchatters to say they’ve gotten closer to their families during the pandemic and are twice as likely to say they are friends with/follow their parents on social, communication, or camera apps.

Because this renewed focus and appreciation on friends, family, and relationships is happening during their formative years, it will likely carry forward and become a new, defining characteristic for this generation.

7 out of 10 are spending more time with their families during the pandemic

3 out of 10 have gotten closer to their families during the pandemic

1 out of 2 are friends with/follow their parents on social, communication, camera apps (2x more than Non-Snapchatters)
Relationships skills will build future career success.

The Snapchat Generation sees the key to their career success rests in building out their EQ, something older generations are still learning later in their careers. Being a hard worker is already ingrained into the Snapchat Generation, so their focus on the personal aspect of connecting with others will only help propel them to succeed.

In Europe, the Snapchat Generation believe that being able to influence others (36%) is just as important to their career success as having a college/university degree (38%).
When you know better you do better

The Snapchat Generation is taking in information from a variety of sources which leads to a constant evolution and growth of who they are and their values. They want their online image to reflect the most up-to-date version of themselves. They are 1.5x more likely than older generations to delete a post that no longer reflects their values.

The Snapchat Generation in Germany is the most likely (57%) to have deleted a post that no longer reflected their opinions/values.
How do they play?
The Snapchat Generation is seeking out moments of levity, joy, silliness, and plain old fun in order to recharge.

This includes the entertainment they consume, the digital media they depend on, and the hobbies they’re taking up as they spend more time than ever at home. They are channeling their energy into creativity and connection, building skills and confidence that they will carry with them into the future, all while having a good time.

“I think it’s incredibly important to always stay open minded and interested towards new things and activities. That’s what makes life interesting...Learning a new language, an instrument or any skill is an enrichment for yourself.”

—Paula, 23, Germany
Making the everyday fun

This creative generation, has more interests and hobbies that bring them joy than non-Snapchatters. This shows their positive outlook on life and ability to find fun in all they do. In particular, the Snapchat Generation is more likely than non-Snapchatters to say that routine activities such as fashion (1.2x), grooming (1.4x) and food (1.1x) provide them with joy.

The Snapchat Generation in France is the most likely to agree that all three of these activities are fun.

- **7 out of 10**
  In the Snapchat Generation think cooking & eating is fun

- **6 out of 10**
  Feel that self-care and grooming are fun

- **6 out of 10**
  Say dressing up is fun
Nearly half (45%) of the Snapchat Generation agree that gaming is a productive activity. (1.3x more likely to agree than non-Snapchatters)

The Snapchat Generation in Spain (56%) is the most likely to agree while those in Norway (32%) are the least likely to agree. Gaming can create a fun way to learn new skills such as a new language or how to train parts of your brain not typically used.
Community Through Gaming

The Snapchat Generation flock to gaming as a way of spending time with friends and family, and a way to connect with people they may have never met IRL.

Half of the Snapchat Generation in Italy and Spain say they have met friends through gaming.

- Snapchat Generation
- Non-Snapchatters
Across Europe, playing video games with family is a favorite activity

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2021 Global Cassandra Study commissioned by Snap Inc. | Base: Europe Total N=11,502 respondents | Q: How much do you agree or disagree with each of the statements below?

**Play Video Games With Family**

<table>
<thead>
<tr>
<th>Country</th>
<th>Snapchat Generation</th>
<th>Non-Snapchatters</th>
</tr>
</thead>
<tbody>
<tr>
<td>ES</td>
<td>1.2x</td>
<td>0%</td>
</tr>
<tr>
<td>IT</td>
<td>1.2x</td>
<td>0%</td>
</tr>
<tr>
<td>FR</td>
<td>1.3x</td>
<td>0%</td>
</tr>
<tr>
<td>UK</td>
<td>1.4x</td>
<td>0%</td>
</tr>
<tr>
<td>DE</td>
<td>1.6x</td>
<td>0%</td>
</tr>
<tr>
<td>NL</td>
<td>1.9x</td>
<td>0%</td>
</tr>
<tr>
<td>NO</td>
<td>2.2x</td>
<td>0%</td>
</tr>
</tbody>
</table>

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The image shows a bar chart comparing the percentage of Snapchat Generation and Non-Snapchatters who play video games with family across different European countries. The chart indicates that Snapchat Generation is more likely to engage in this activity compared to Non-Snapchatters.
In Europe, the Snapchat Generation is 1.5x more likely than non-Snapchatters to gravitate to immersive video & mobile games, including AR experiences.

This is especially true in Spain and Italy.
The Snapchat Generation will define the future.

In Europe, the Snapchat generation’s strong point of view on global events, insistence on inclusion and openness to talking about tricky topics make them a generation to be reckoned with. Where does your brand stand with the Snapchat Generation?

<table>
<thead>
<tr>
<th>BECAUSE...</th>
<th>ASK YOURSELF...</th>
</tr>
</thead>
<tbody>
<tr>
<td>They have high aspirations and challenge themselves</td>
<td>How can you help them be their best selves?</td>
</tr>
<tr>
<td>They are independent and are change agents</td>
<td>How can you be an ally and activist?</td>
</tr>
<tr>
<td>They expect a two-way dialogue</td>
<td>How do you incorporate them into your story?</td>
</tr>
</tbody>
</table>
Methodology

We started with secondary research of Trendspotting and a deep dive review of existing insights from The Cassandra Report® related to Gen Z attitudes and media consumption habits across the globe in select key markets which informed all parts of this bespoke inquiry.

The Real Story was generated through a 20-minute, online quantitative survey fielded October 15, 2020 — November 30, 2020 in the US, Mexico, Brazil, UK, France, Germany, Spain, Italy, Netherlands, Norway, Saudi Arabia, UAE, India, Malaysia, Indonesia, Japan, and Australia.

We interviewed a range of respondents aged 13+ within each country (specific sample sizes are listed in the callouts on the next page); the sample accounted for a mix of age, gender and region (and ethnicity in the US) among those who self-identified as Daily Snapchatters and Non-Snapchatters. To qualify, respondents had to use Snapchat at least once daily (Daily Snapchatters) or do not have Snapchat downloaded/have never heard of Snapchat (Non-Snapchatters). During analysis to ensure a representative read on the individual countries, cell weighting based on nested gender and age were applied to each country helping to correct for demographic imbalances due to set sampling sizes. For each country, Snapchat users were weighted based on the combination of their gender (male/female) and age group (13-20 years old, 21-24 years old, 25-34 years old, 35+ years old). For Brazil and Indonesia, due to the set sampling sizes, the age was grouped to 13-34 years old and 35+ years old. Non-Snapchat users were assigned a weight of 1. Regional reports were created based on averaged weighted data across countries included in each region. North America includes US; Europe includes UK, France, Germany, Spain, Italy, Netherlands, Norway; LATAM includes Mexico and Brazil; APAC includes India, Indonesia, Malaysia, Japan, Australia; MENA includes Saudi Arabia and UAE.

Additionally, Daily Snapchatters were recruited within each country to participate in qualitative focus groups and IDIs to showcase their Trendspotting, forward thinking, and to further explore key themes found in the quantitative research.
Thank you!