

Say Hello to the Snapchat Generation

The Real Story



ENGINE

CASSANDRA

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Key Findings



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.



01

Who is the Snapchat Generation?

They are diverse & value inclusivity.

In the US, the Snapchat Generation is 2X more likely to be Black and almost 3X more likely to be Hispanic or Latin X than older generations.

3 out of 4 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.

They are wise & worldly.

8 out of 10 say they are informed about world events and news. They are 30% 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” (compared to only 5 in 10 of 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.



Our generation is....

**"Adaptable,
Optimistic,
Resilient."**

—Alejo, a member of the
Snapchat Generation, age 21, Spain



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



Clothes I wear



> mental health
Σ physical health

My room/home



Cooking/the food I eat

Videos/shows/movies I watch | Causes I care about

Clothes I wear

Sports I play/follow
Games I play



The content I create/share online | My makeup/cosmetics/grooming



The art/work I create | My activism | Car I drive | Influencers I follow

School I attend | Tattoos/Piercings I have

The technology I use | My hairstyle

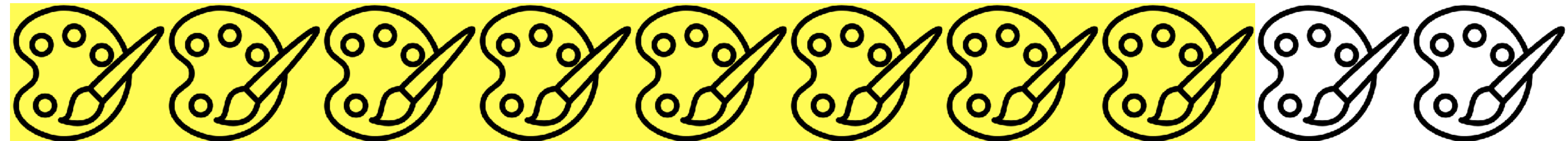
The Snapchat Generation is more likely than non-Snapchatters to view themselves as both kind and creative.

These self descriptors are consistent across the globe. Kindness and Creative are usually ranked #1 and #2.

The only exceptions are: France: #1 Booksmart, #2 Kind, and #3 Creative, Malaysia: #1 Independent, #2 Kind, and #3 Creative, and India: #1 Concerned about the environment, #2 Creative, and #3 Kind.



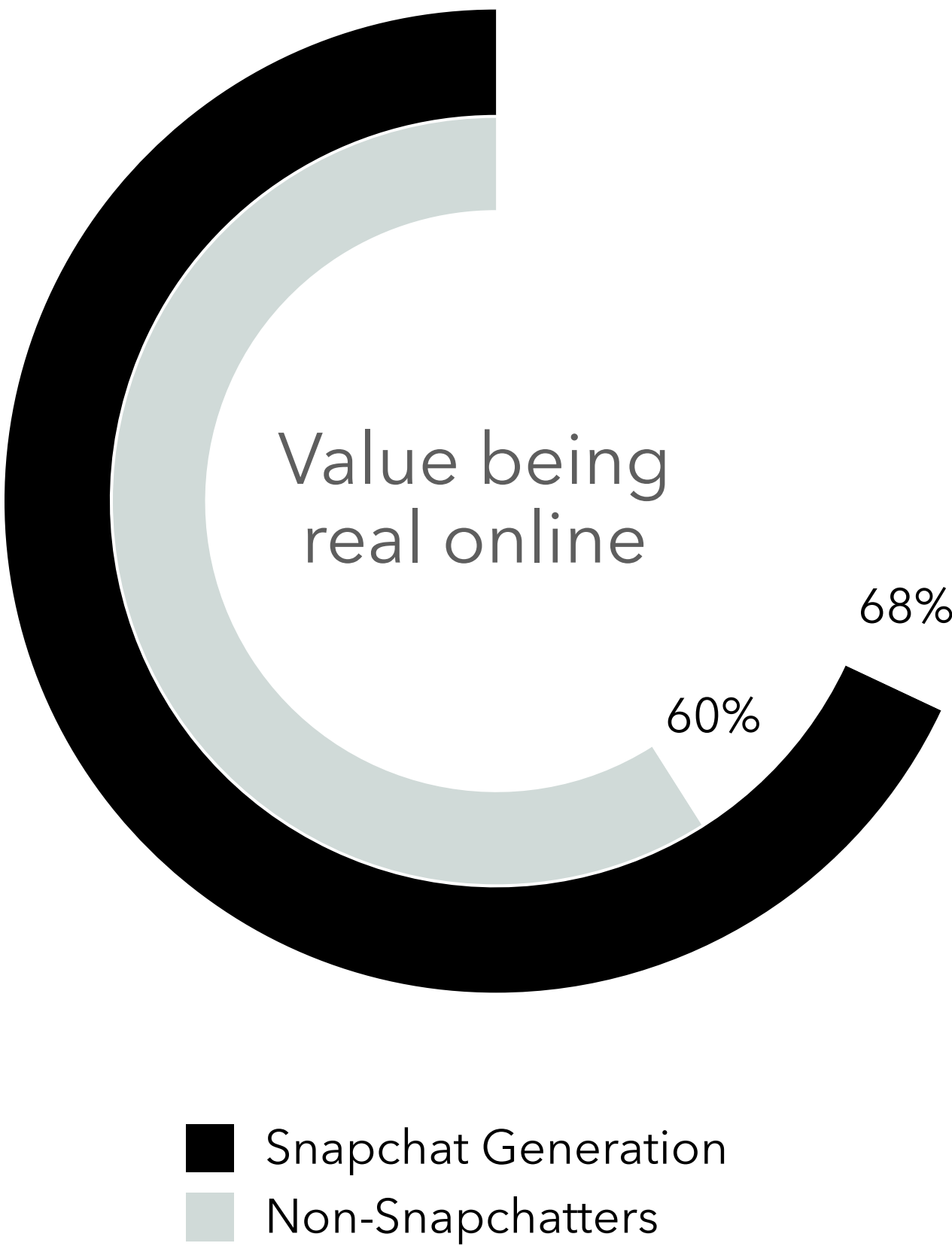
9 out of 10 in the Snapchat Generation describe themselves and their friends as **kind**.



8 out of 10 describe themselves as **creative**.

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.



8 in 10 say 'It's important to me to be true to myself'

8 out of 10 in the Snapchat Generation agree,

**“It’s important to me to
form my own opinions
(i.e., without the
influence of others)”**



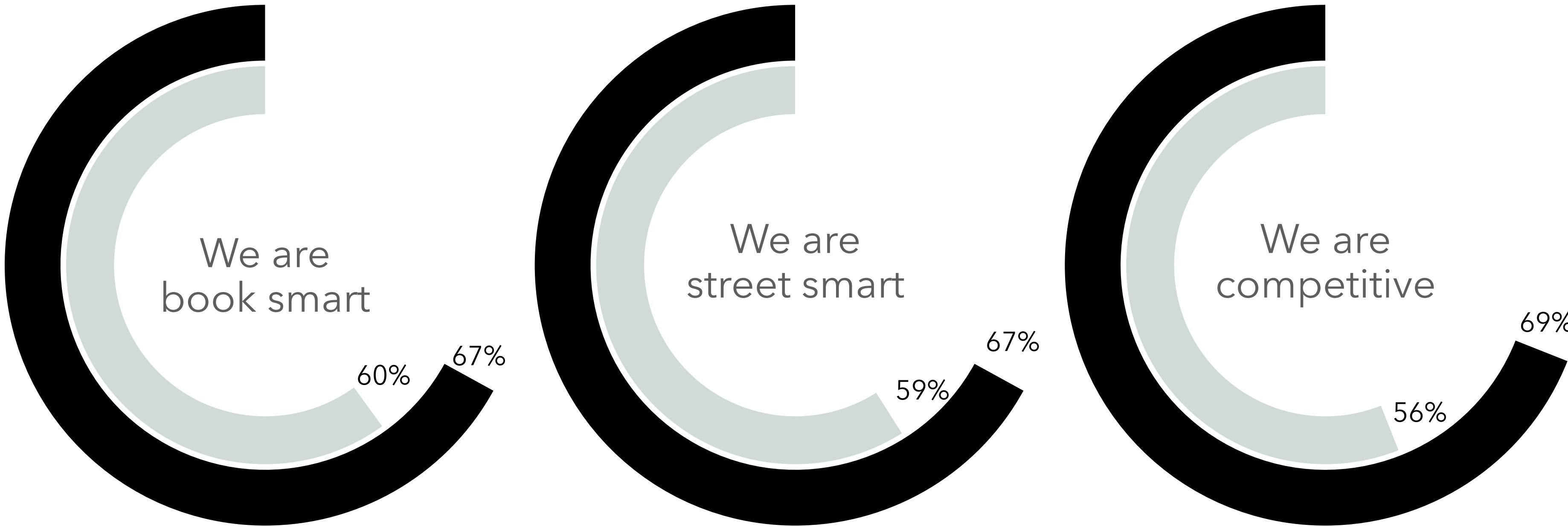
A drive to excel

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, the Snapchat Generation is driven to be significant. Sixty-nine percent see themselves as “competitive” 13 pts higher than non-Snapchatters.

- Snapchat Generation
- Non-Snapchatters

Self and Friend Descriptors

Completely/Somewhat Agree Summary



But at what cost? Stress.

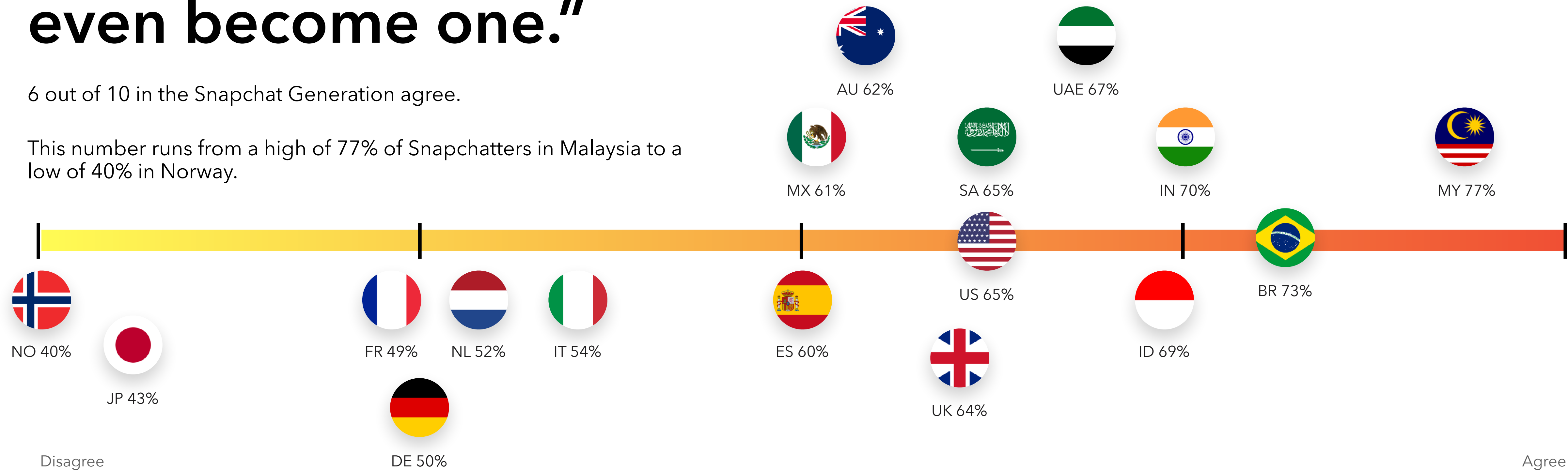
The pressures to excel and change the world, coupled with the world they are living in (social injustice, political division, terrorism, climate change, and now a pandemic) inevitably lead this generation to be stressed out.



"I feel expected to act like an adult before I even become one."

6 out of 10 in the Snapchat Generation agree.

This number runs from a high of 77% of Snapchatters in Malaysia to a low of 40% in Norway.



60% of the Snapchat Generation feels stress on a weekly or daily basis

(v. 51% for non-Snapchatters)

	TOP CAUSES OF STRESS
#1	Covid-19 (60%)
#2	Money (49%)
#3	School/Work (46%)
#4	Not getting enough sleep (45%)
#5	My health/fitness (33%)

Even with all the stressors in their lives and after an extraordinarily difficult year all around the globe, **this generation is feeling more:**



Hopeful

(1.3x vs. non-Snapchatters)



Happy

(1.5x vs. non-Snapchatters)



Excited

(1.5x vs. non-Snapchatters)



Fulfilled

(1.6x vs. non-Snapchatters)



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.



02

How do they communicate?

“[Our generation] forms a bridge between previous and future generations in a new era of technological progress and global change.”

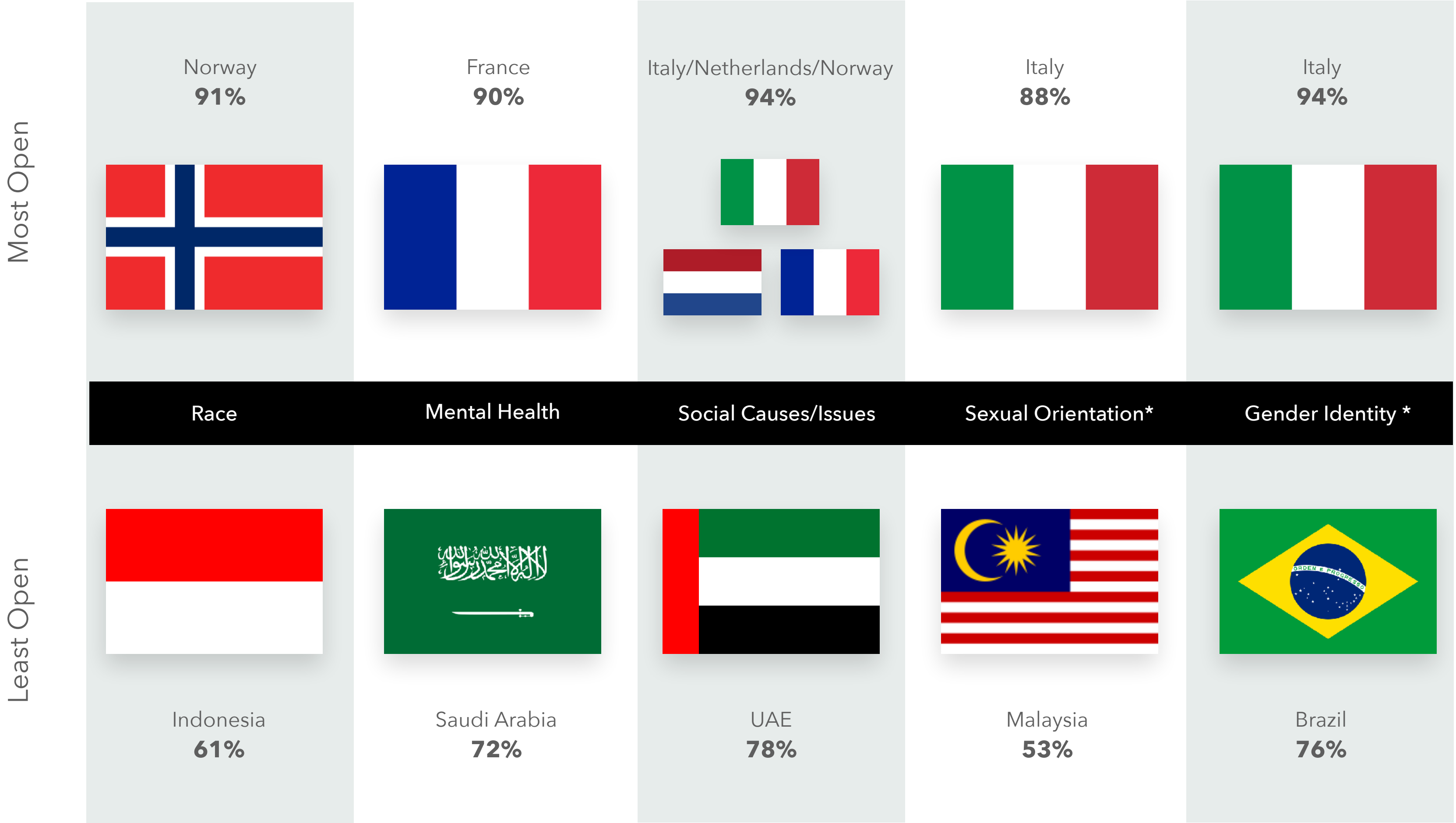
—Annick, a member of the Snapchat Generation,
age 22, Netherlands



The Snapchat Generation is comfortable having uncomfortable conversations.

Even in the least open countries, more than half are open to discussing difficult topics. When it comes to discussing “taboo” topics, countries in Europe are the most open to discussing. Even in the least open countries, a majority of the Snapchat Generation is open to discussing each topic.

Countries Most Open to Discussing vs. Least Open





The Snapchat Generation is 150% more likely to prefer to communicate with pictures over words than non-Snapchatters

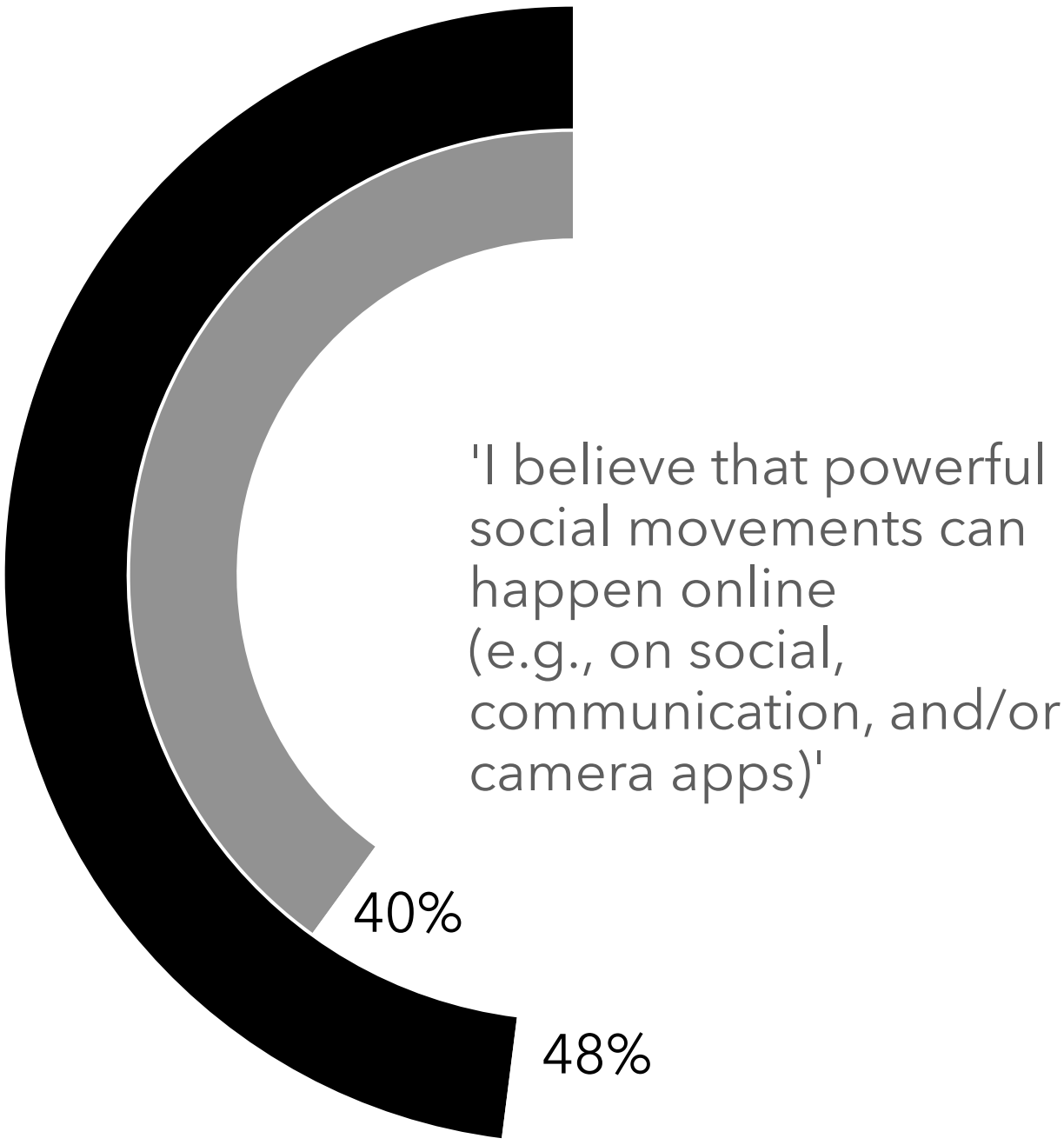
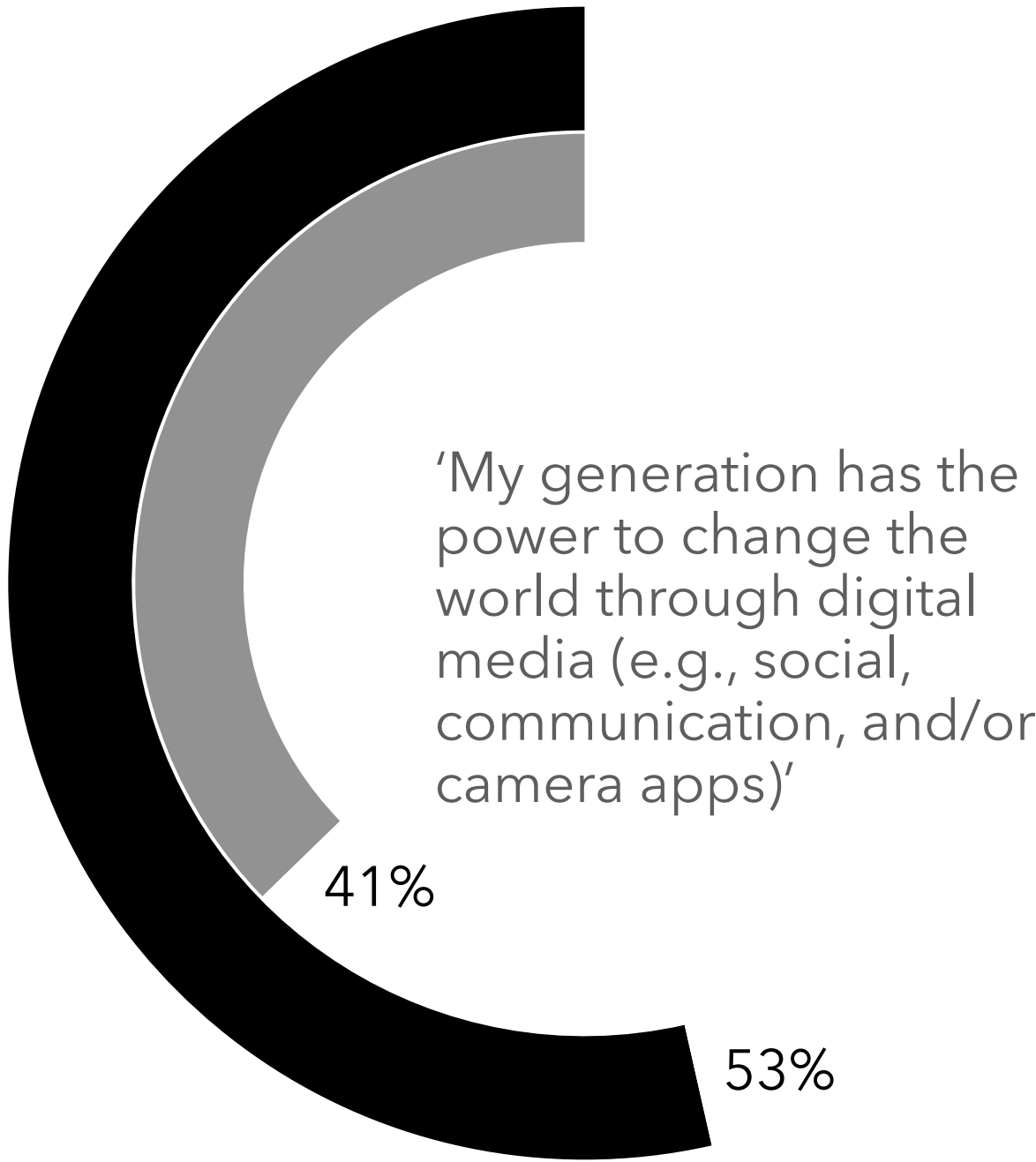
TOP 5 ITEMS USED IN DIGITAL COMMUNICATIONS	
#1	Photos (81%)
#2	Emojis/Emoticons (76%)
#3	Videos/Video Messages (61%)
#4	Video Calls (60%)
#5	Memes (56%)

2021 Global Cassandra Study commissioned by Snap Inc. | Base: Total N=27,006 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.

Digital tools

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.

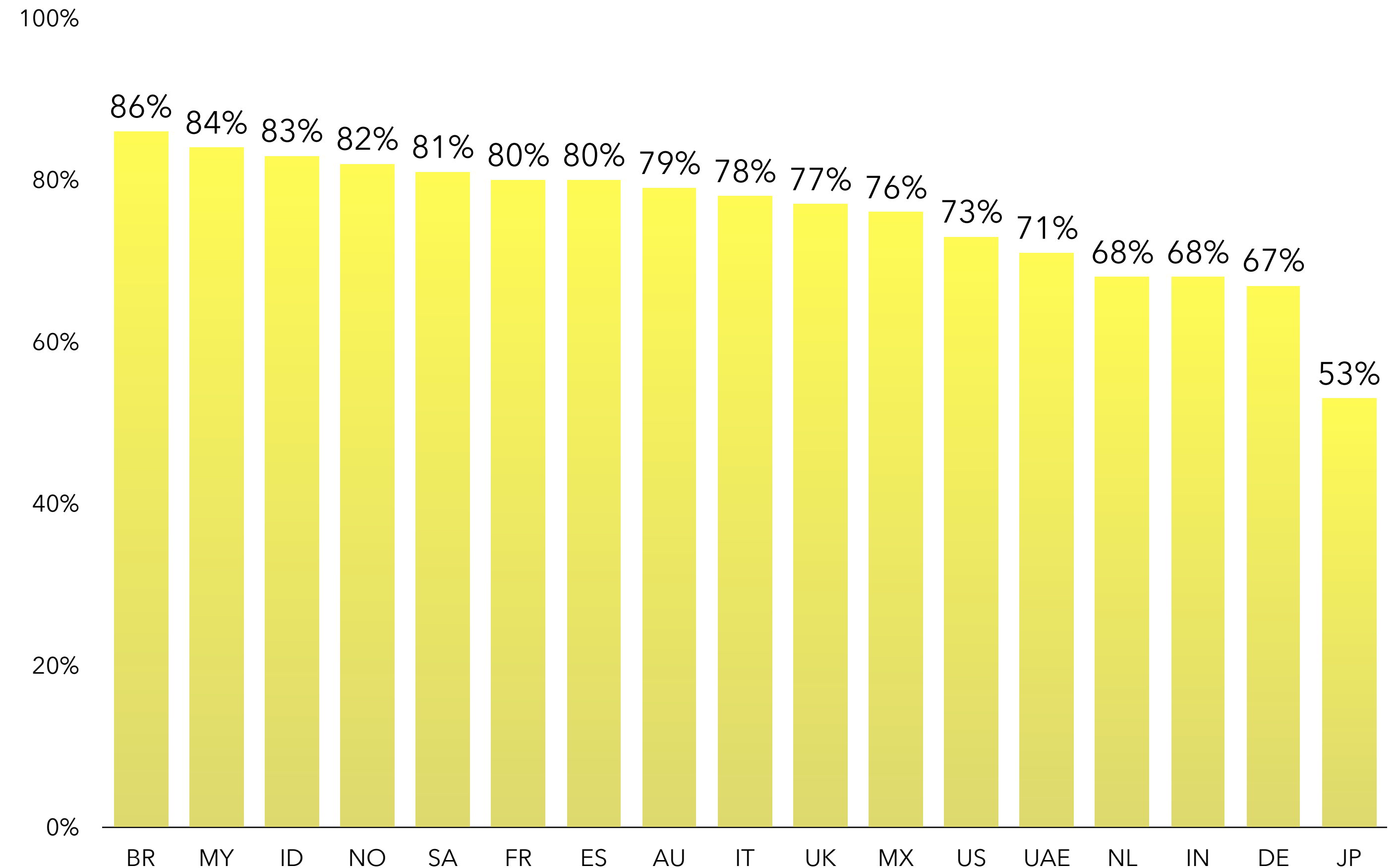
- Snapchat Generation
- Non-Snapchatters



The Snapchat Generation is 1.2X more likely than non-Snapchatters to agree that their actions can make a difference.

And they put their money where their mouth is. Across the globe, the Snapchat Generation reports that they are contributing more to charity now than in the past.

The Snapchat Generation | Giving Back More Than Before



2021 Global Cassandra Study commissioned by Snap Inc. | Base: Total N=27,006 respondents

Q: How much do you agree or disagree with each of the statements below? Please select one response per row.

Snap Inc. survey of US, UK, AU, NL, NO, FR, DE, ES, IT, JP, MY, IN, ID, SA, UAE, BR, MX Snapchat users November 27 - December 02, 2020. Age and location data subject to restrictions. See <https://businesshelp.snapchat.com/en-US/a/audience-size-tool> for details. Question: "Think about your plans to contribute to charitable causes this holiday season (e.g., donate, volunteer), do you expect you'll do this more, less, or the same as last year?"

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'

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

+6 pts from Non-Snapchatters





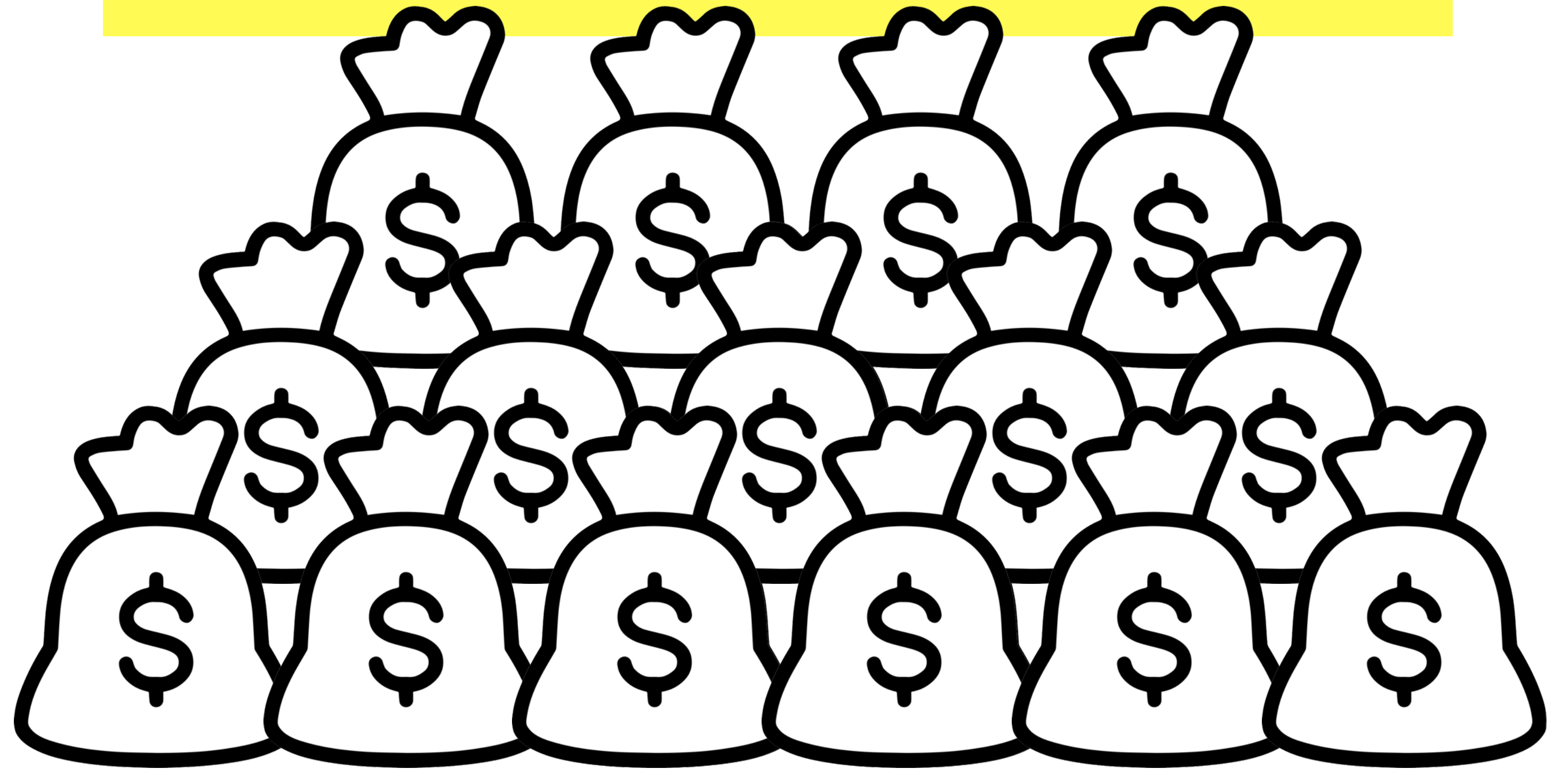
03

**How do
they spend?**

\$4.4 Trillion

Let's Get Spending

Discretionary spending power for the Snapchat Generation reaches a whopping \$4.4 trillion worldwide.



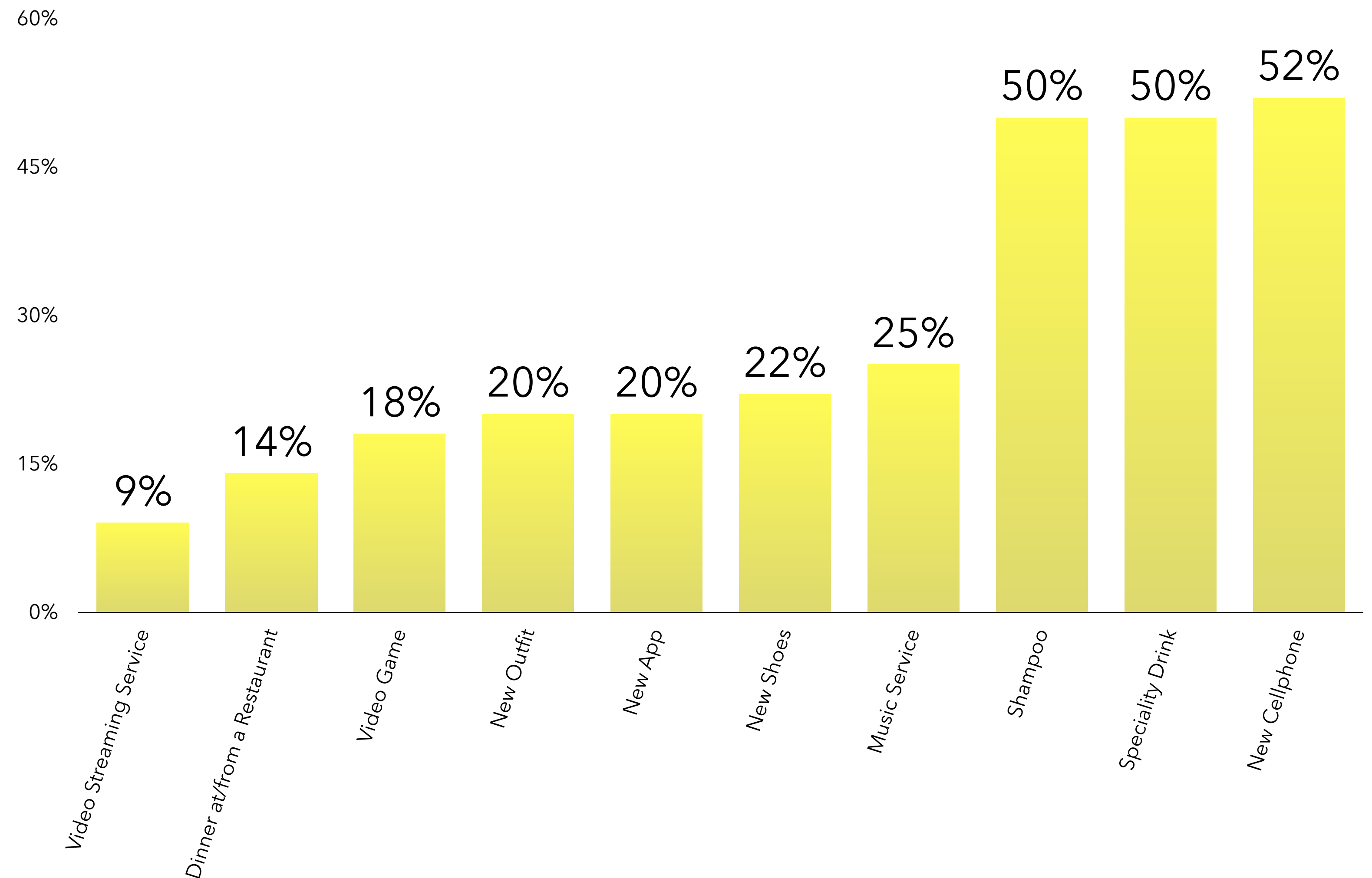
2021 Global Cassandra Study commissioned by Snap Inc. | Base: Those with a monthly income N=12,710 respondents. Cumulative total of average by market.

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.

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.

How much more the Snapchat Generation is willing to spend vs. non-Snapchatters by category





The Snapchat Generation has a highly entrepreneurial spirit and already strives for financial independence

2 in 3

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

9 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."

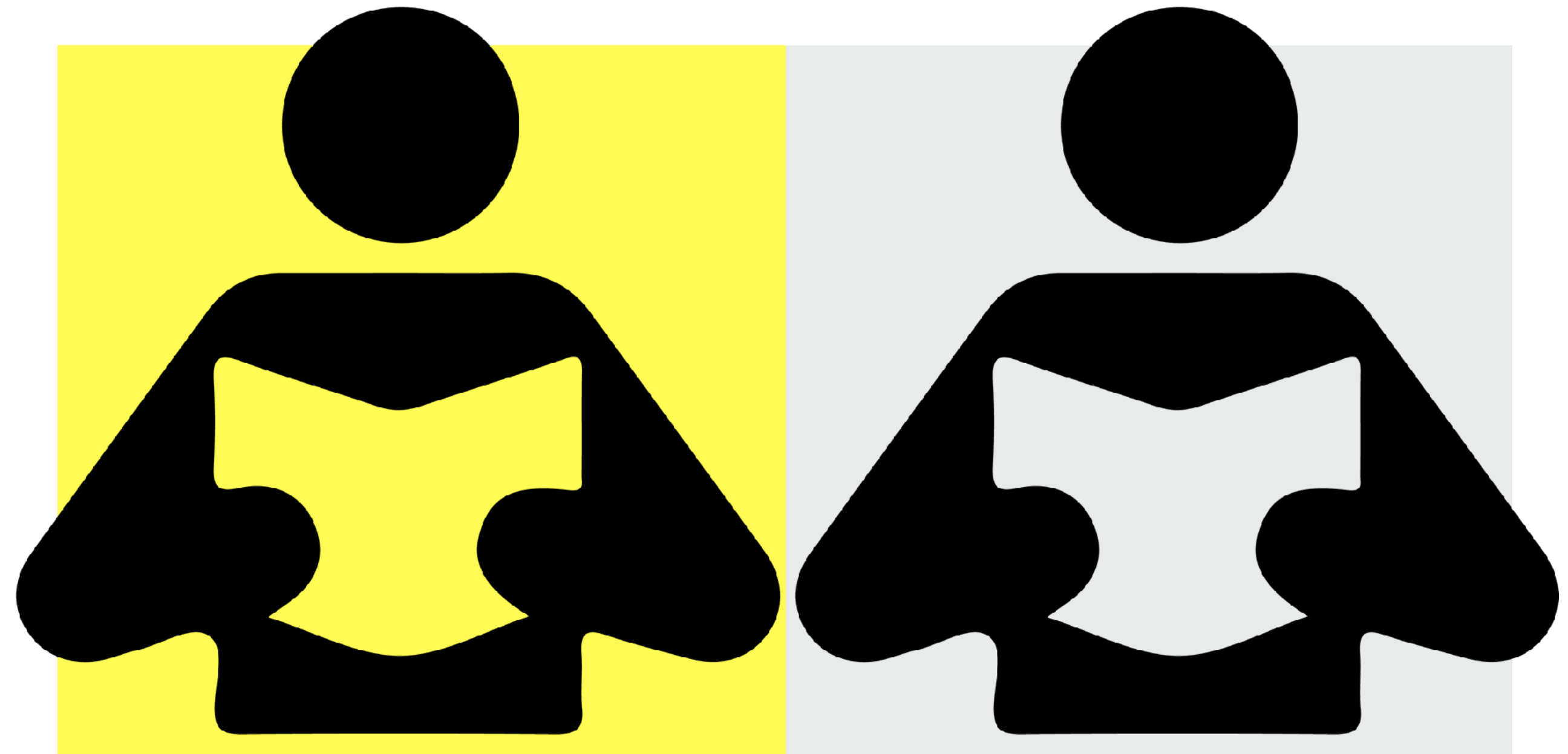
—Sam, 18, UK

"I'd like to build my career as an entrepreneur especially in fashion or food & beverage industry"

—Claudia, 19, Indonesia

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



1 in 2 say they like to learn the backstory of brands & products that they buy vs. 41% for non-Snapchatters

The Snapchat Generation will show that loyalty by showcasing their favorite brands' logos

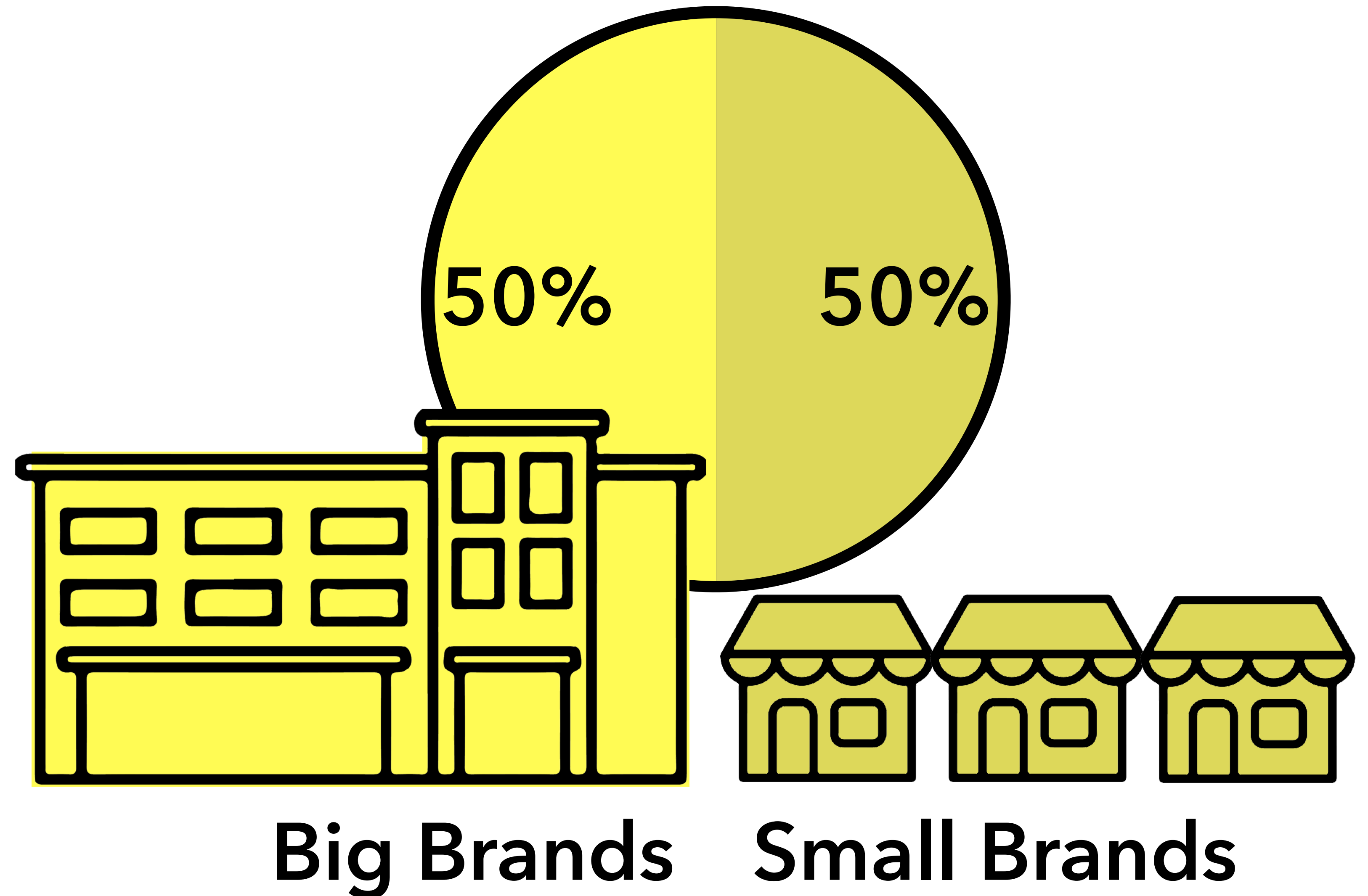
The Snapchat Generation is more likely than non-Snapchatters to...

- Agree that they like to have clothes and accessories that have brand logos on them (+19 pts)
- Say wearing brand logos helps me show my personal identity (+15 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) (+11 pts)



The Snapchat Generation favors big and small brands evenly

Additionally, the Snapchat Generation is 1.2X more willing to shop at/from the brands they want to support even if they are less convenient.



Next Gen Shopping: Leading on Using Augmented Reality

The Snapchat Generation is 3X more likely than non-Snapchatters to say they are using AR to try on products more than they did one year ago.

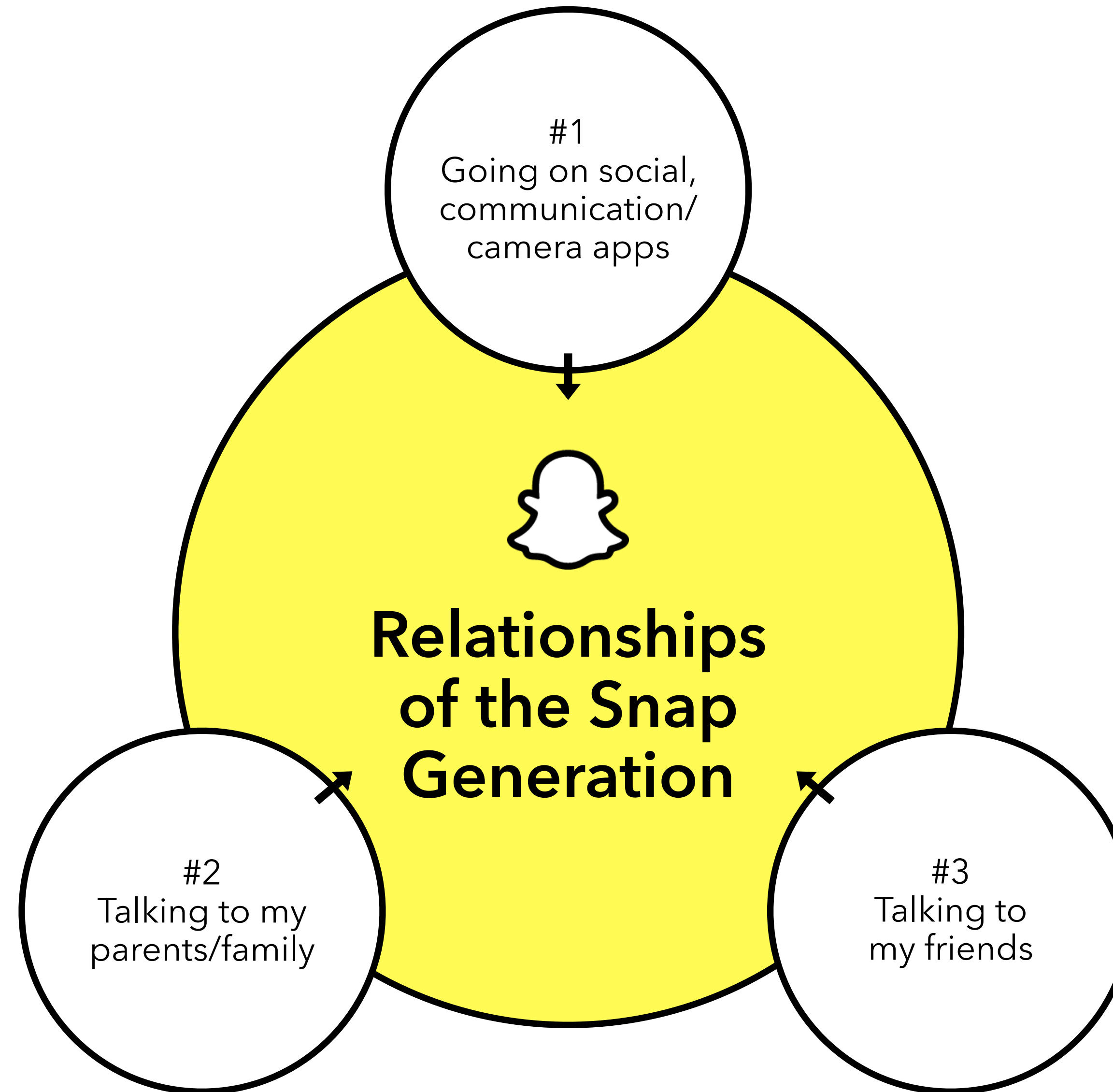




04

**How do
they relate?**

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



The Snapchat Generation places tremendous value on their relationships with family and friends and communication/camera apps are key to keeping those relationships strong

The value they place on those relationships has only grown stronger since the pandemic...



“The pandemic really made me appreciate what I have and the relationships I have.”

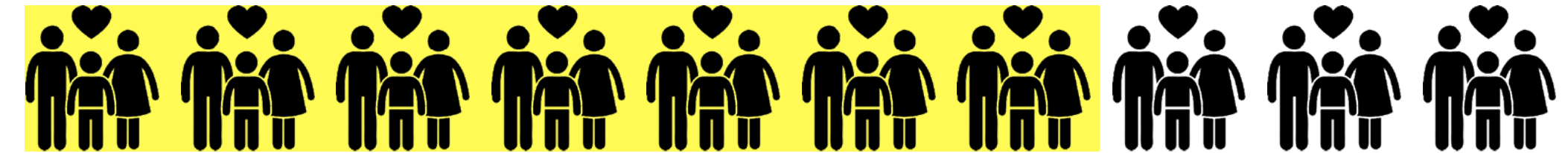
I realized how my life was not as fun or as happy without my friends. This summer, I got to travel with my friends and it was overwhelming how much I appreciated getting to see them.”
—Hina, a member of the Snapchat Generation, age 21, Japan

#1 Reason the Snapchat Generation uses Snapchat is to stay connected with friends.

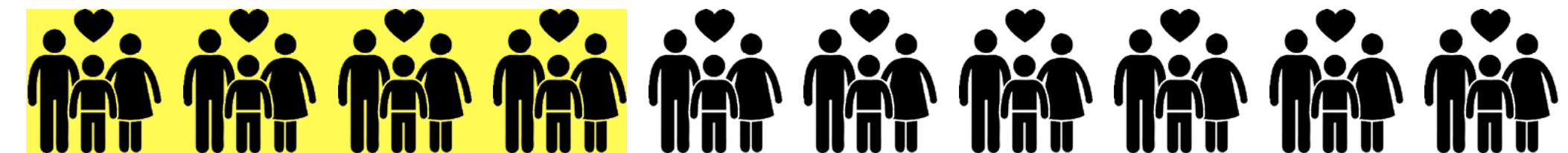


The Snapchat Generation will emerge from the pandemic with a stronger appreciation of family

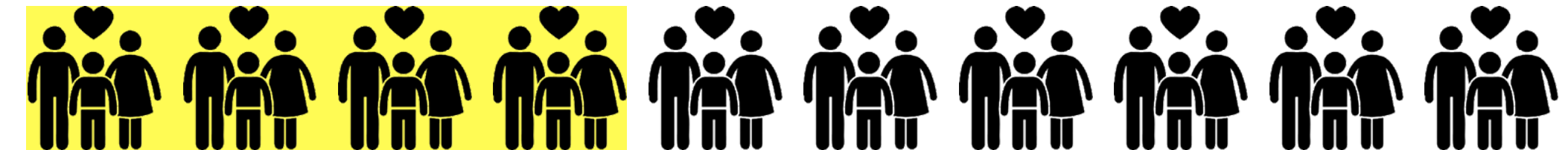
Because this renewed focus and appreciation on friends, family, and relationships is happening during their formative years, it will likely carry forward into adulthood and become a new, defining characteristic for this generation



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



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



4 out of 10 are friends with/follow their parents on social, communication, camera apps (2x more than Non-Snapchatters)

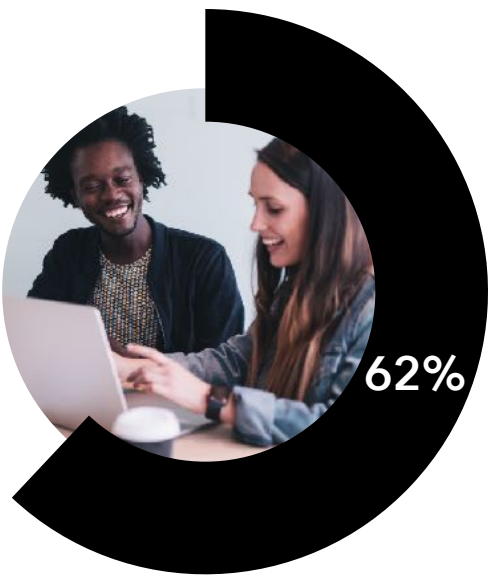
Relationships skills will build future career success

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.

Factors of Career Success As Defined by the Snapchat Generation



Mentally/
emotionally strong
(vs 56% Older Gens)



Good at working with
different types of people
(vs 60% Older Gens)



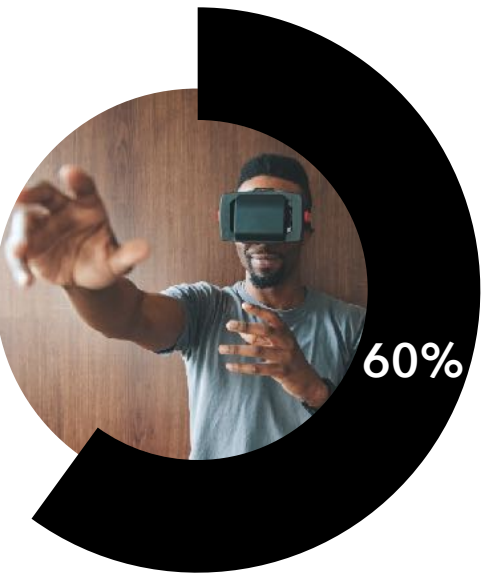
Good listener
(vs 60% Older Gens)



Flexible/ open to change
(vs 60% Older Gens)



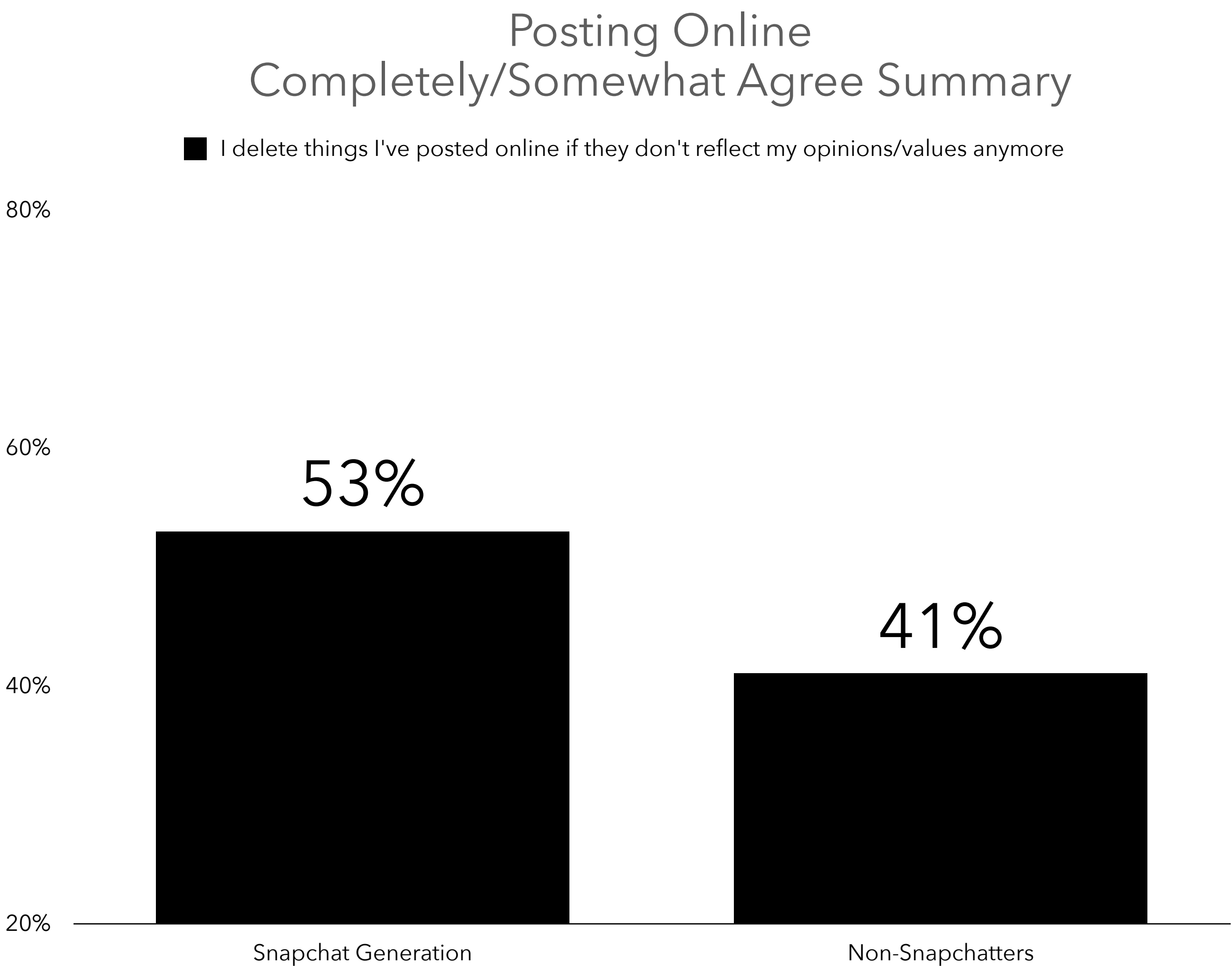
Good at speaking/ writing
(vs 53% Older Gens)



Knowing how to use
latest technology
(vs 46% Older Gens)

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.





05

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 (1.4x), grooming (1.4x) and food (1.1x) provide them with joy.



8 out of 10

In the Snapchat Generation think cooking & eating is fun



7 out of 10

Feel that self-care and grooming are fun



7 out of 10

Say dressing up is fun

1 in 2 of the Snapchat Generation agree that gaming is a productive activity (1.4X more likely to agree than non-Snapchatters)

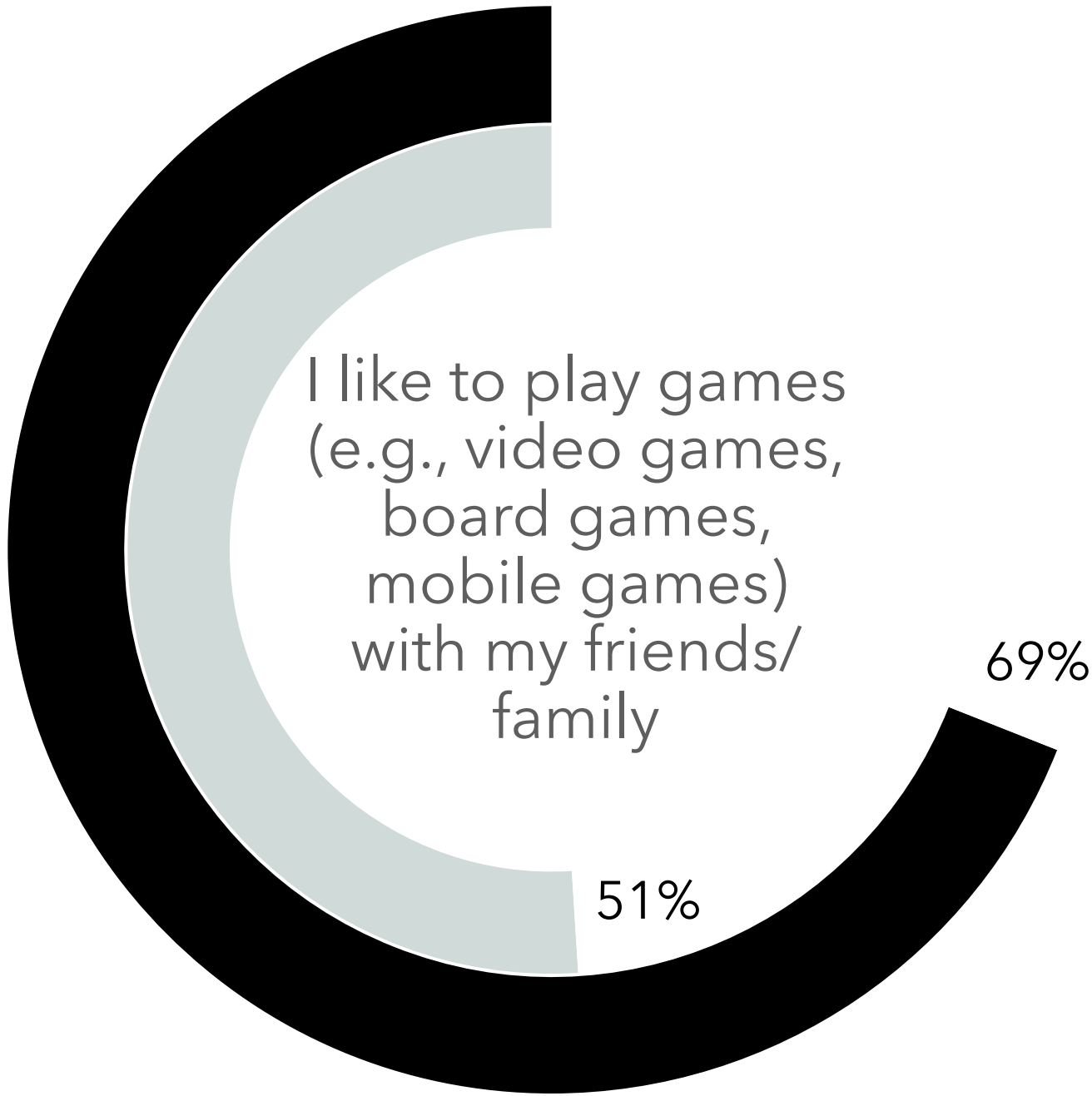
Gaming can create a fun way to learn new skills such as a new language or how to train parts of your brain not typically used.



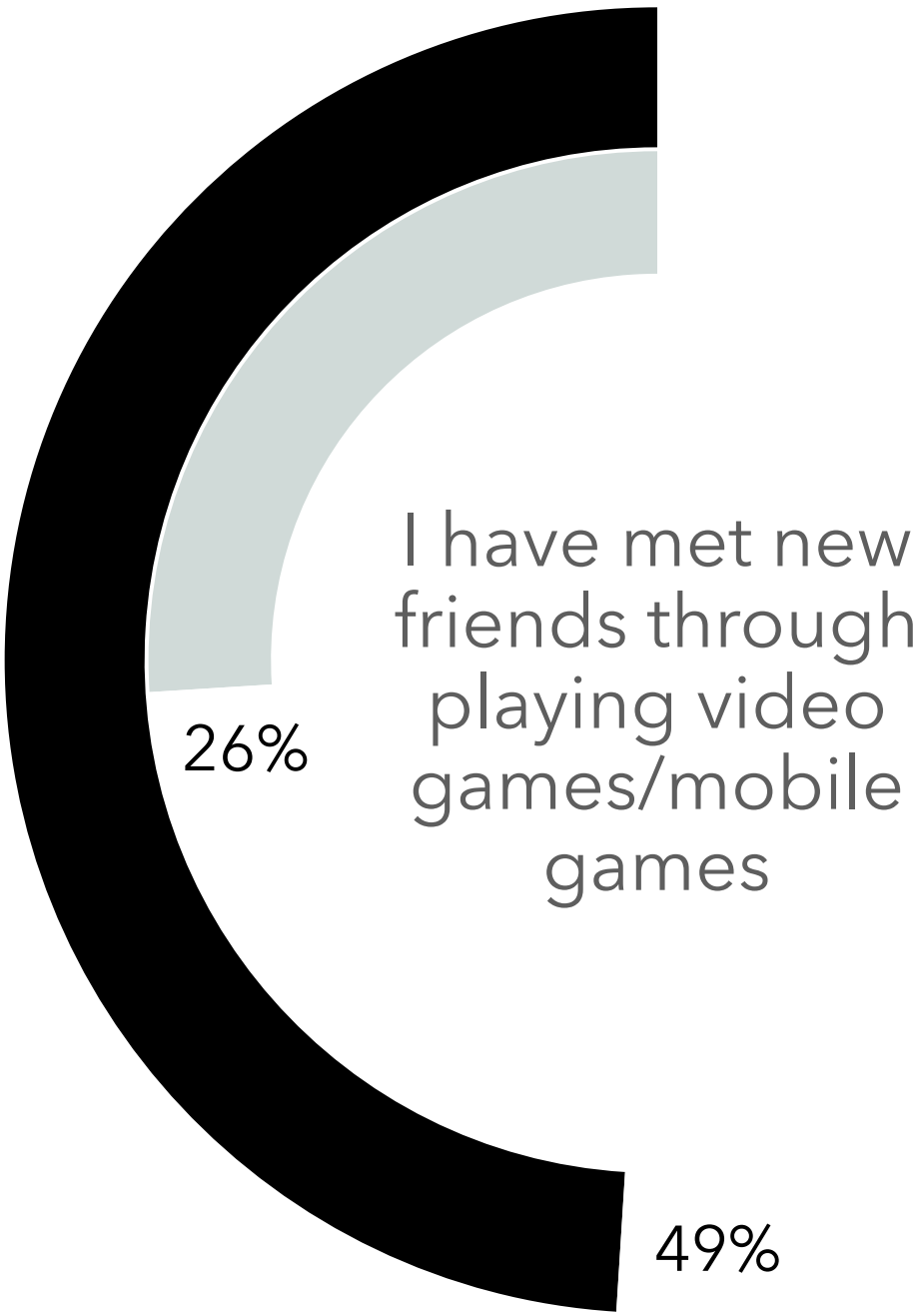
Community Through Gaming

The Snapchat Generation **flocks 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.** This is especially true among men in the Snapchat Generation (compared to women, +6 and +18 points, respectively) and students (compared to non-students, +7 and +9 points, respectively).

- Snapchat Generation
- Non-Snapchatters



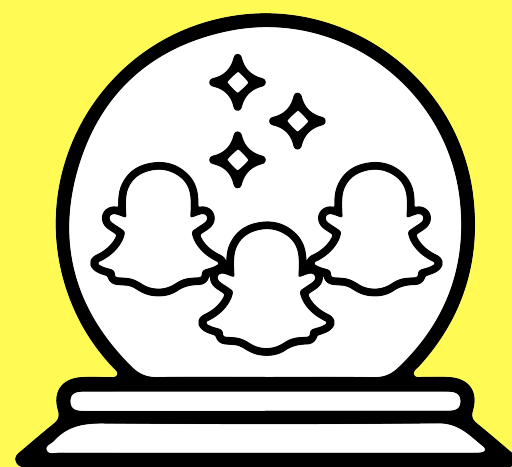
Snapchat Generation
Men: 73%
Women: 67%



Snapchat Generation
Men: 60%
Women: 42%

The Snapchat Generation is 1.5X more likely than non-Snapchatters to gravitate to immersive video & mobile games, including AR experiences





The Snapchat Generation will define the future.

With \$4.4 trillion in estimated discretionary spending, the Snapchat generation is one to be reckoned with. Where does your brand stand with the Snapchat Generation?

BECAUSE...	ASK YOURSELF...
They have high aspirations and challenge themselves	How can you help them be their best selves?
They are independent and are change agents	How can you be an ally and activist?
They expect a two-way dialogue	How do you incorporate them into your story?

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 IDs to showcase their Trendspotting, forward thinking, and to further explore key themes found in the quantitative research.

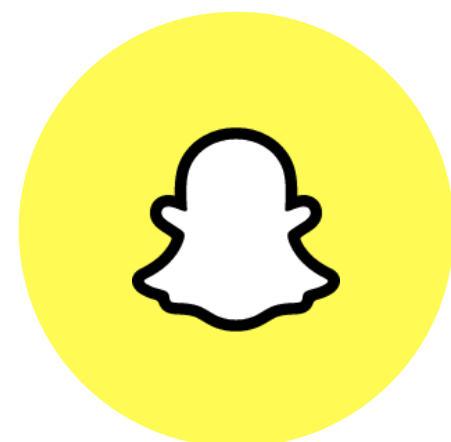
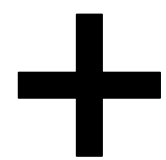
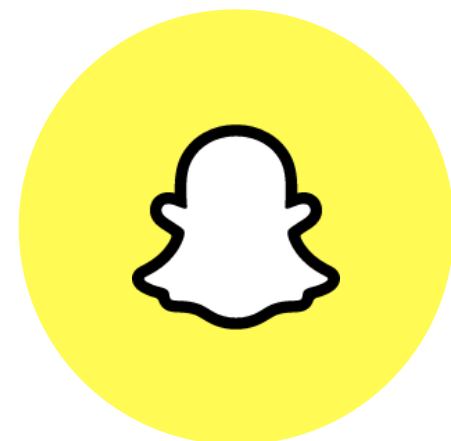
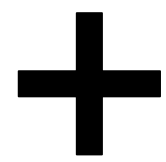
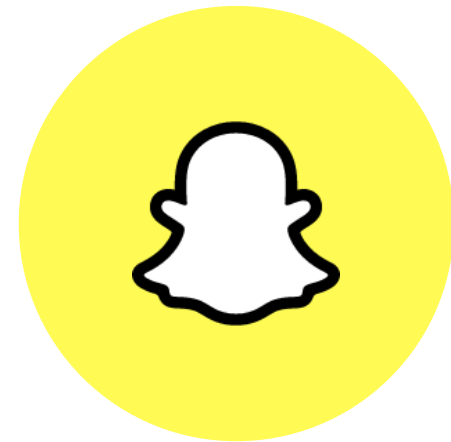


Thank you!



Appendix





A Broader View of Who They Are

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.

Independent, Critical Thinkers

Members of the Snapchat Generation are both booksmart *and* streetsmart. They are more likely than prior generations to form their own opinions and rethink previously held conventions.

Ready to Change the World

As Mobile Natives, the Snapchat Generation sees digital media as a tool in which to foster change. They have a more worldly view and don't define their community by geography, but rather by shared interests and passion points.



**Their activity and
involvement,
however,
comes at a price.**

Because they are involved in so many things, they have higher levels of stress than prior generations.

Covid-19 & the Pandemic:

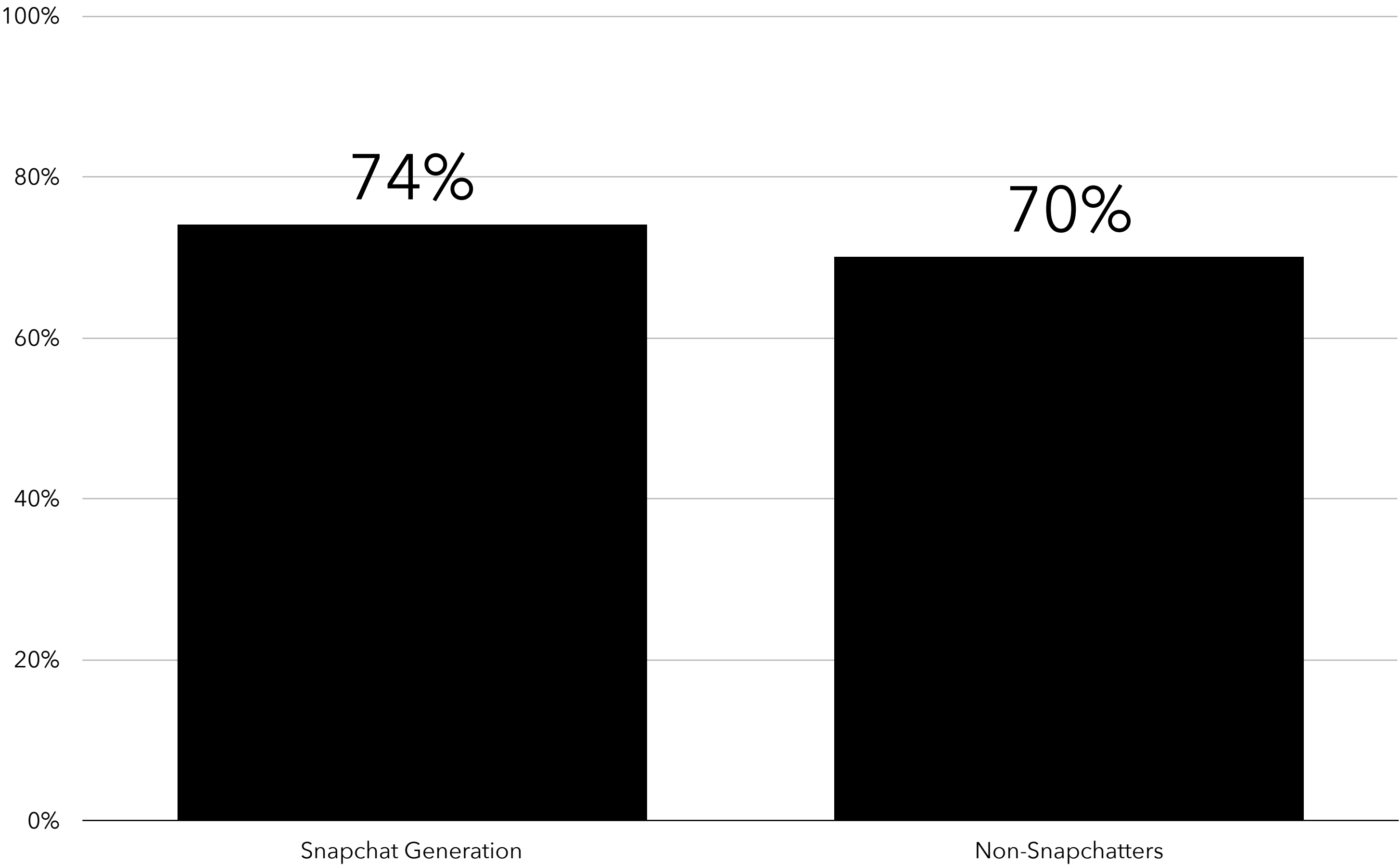
**60% of Snapchatters
cite the pandemic as a
cause of stress, on par
with other segments.**

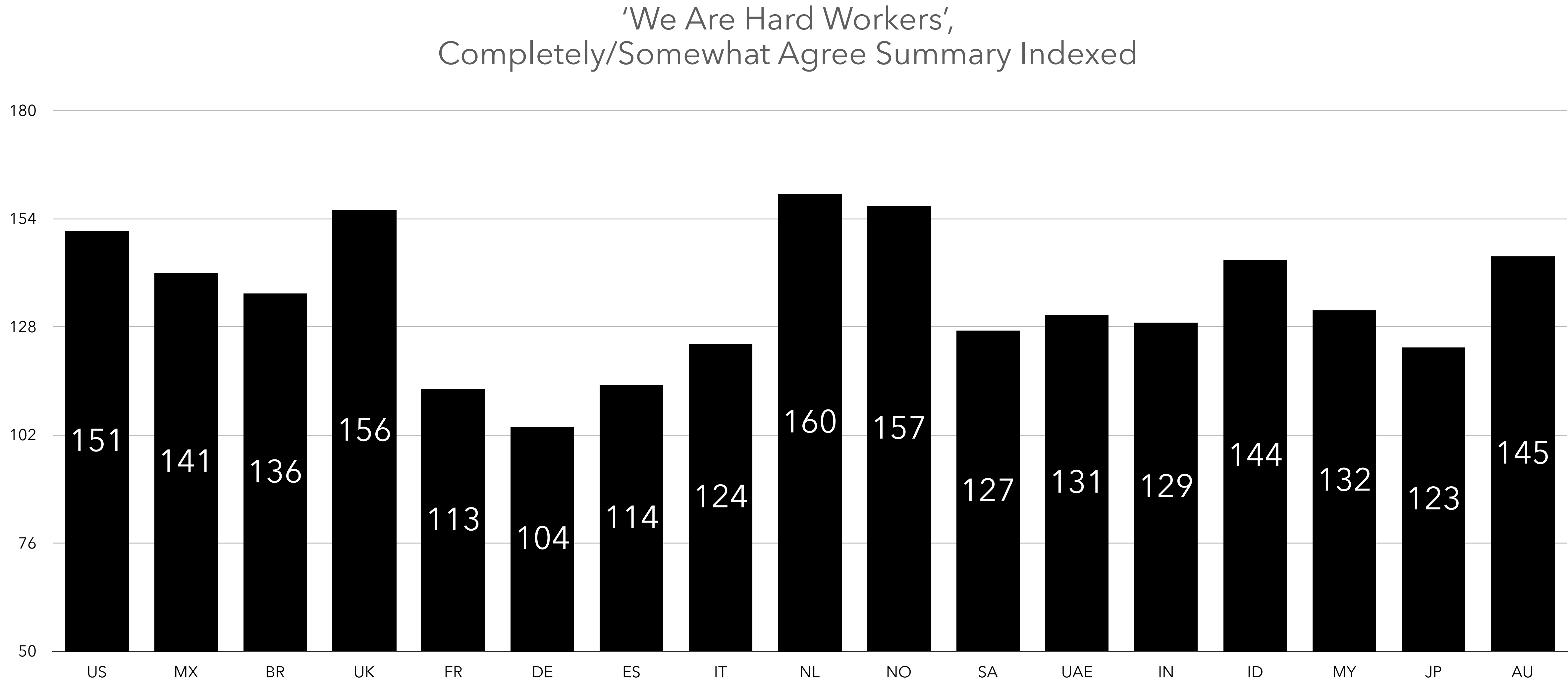


A global view of culture

74% of the Snapchat Generation, significantly more than Non-Snapchatters (70%), agree it's important to pay attention to culture from around the world. This is most true among the Snapchat Generation in Norway.

'It is important to pay attention to culture from around the world',
Completely/Somewhat Agree Summary





The Snapchat Generation is **1.3 times more likely** to volunteer than non-Snapchatters

As Snapchatters define themselves as being kind, 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 Brazil, Norway, Saudi Arabia, UAE, India & Indonesia



Checking social, communication, and/or camera apps is the top thing the Snapchat Generation can't go a day without doing

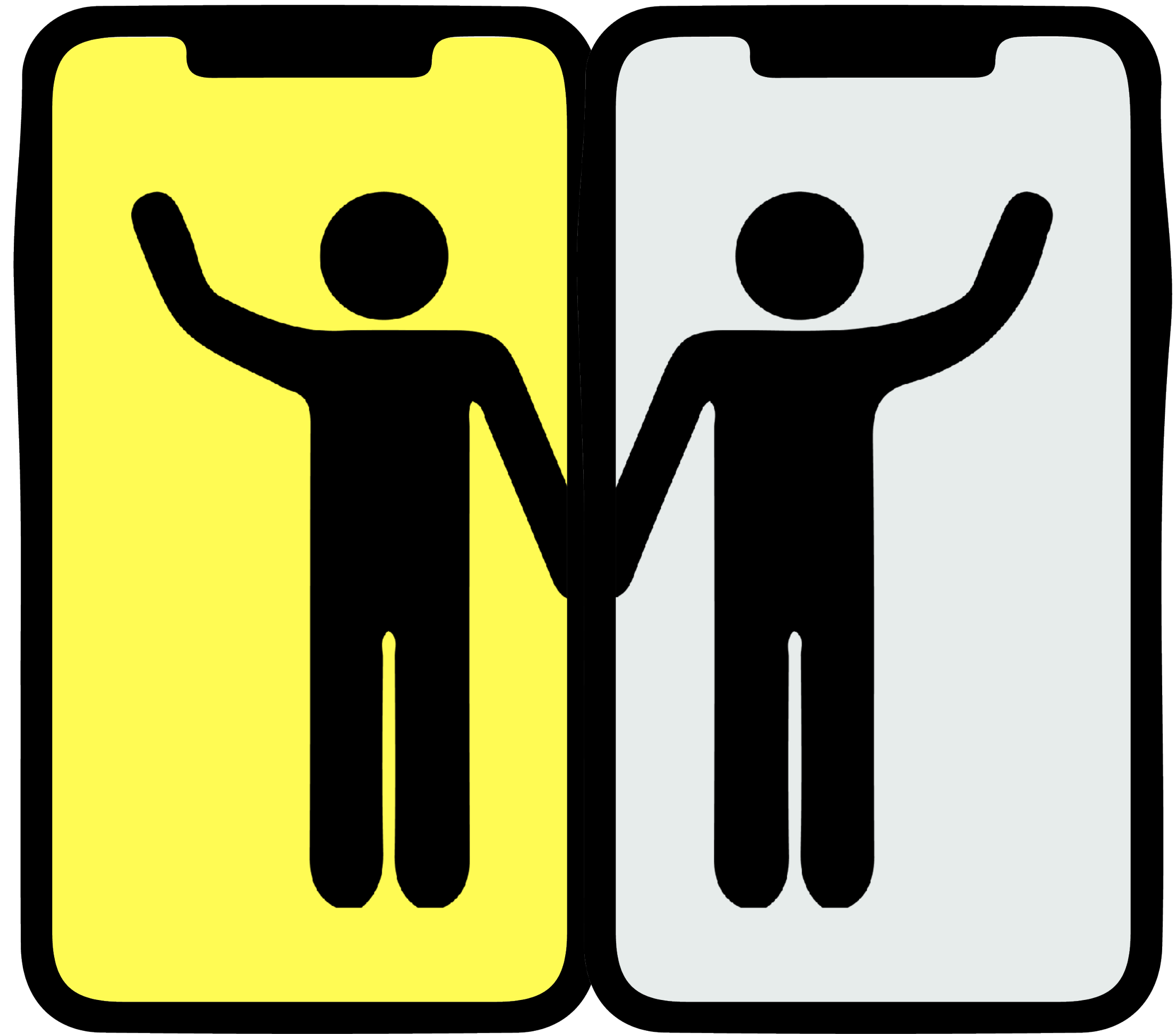
This ranks ahead of talking with parents (#2 49%), talking with friends (#3 45%), watching videos and reading the news (Tied #4 34%).

They are also much more likely than Non-Snapchatters (51% vs. 37%) to say they won't skip a day without going on these platforms.



1 in 2 of the Snapchat Generation feel digital platforms connect them with others

2.6x more likely than Non-Snapchatters



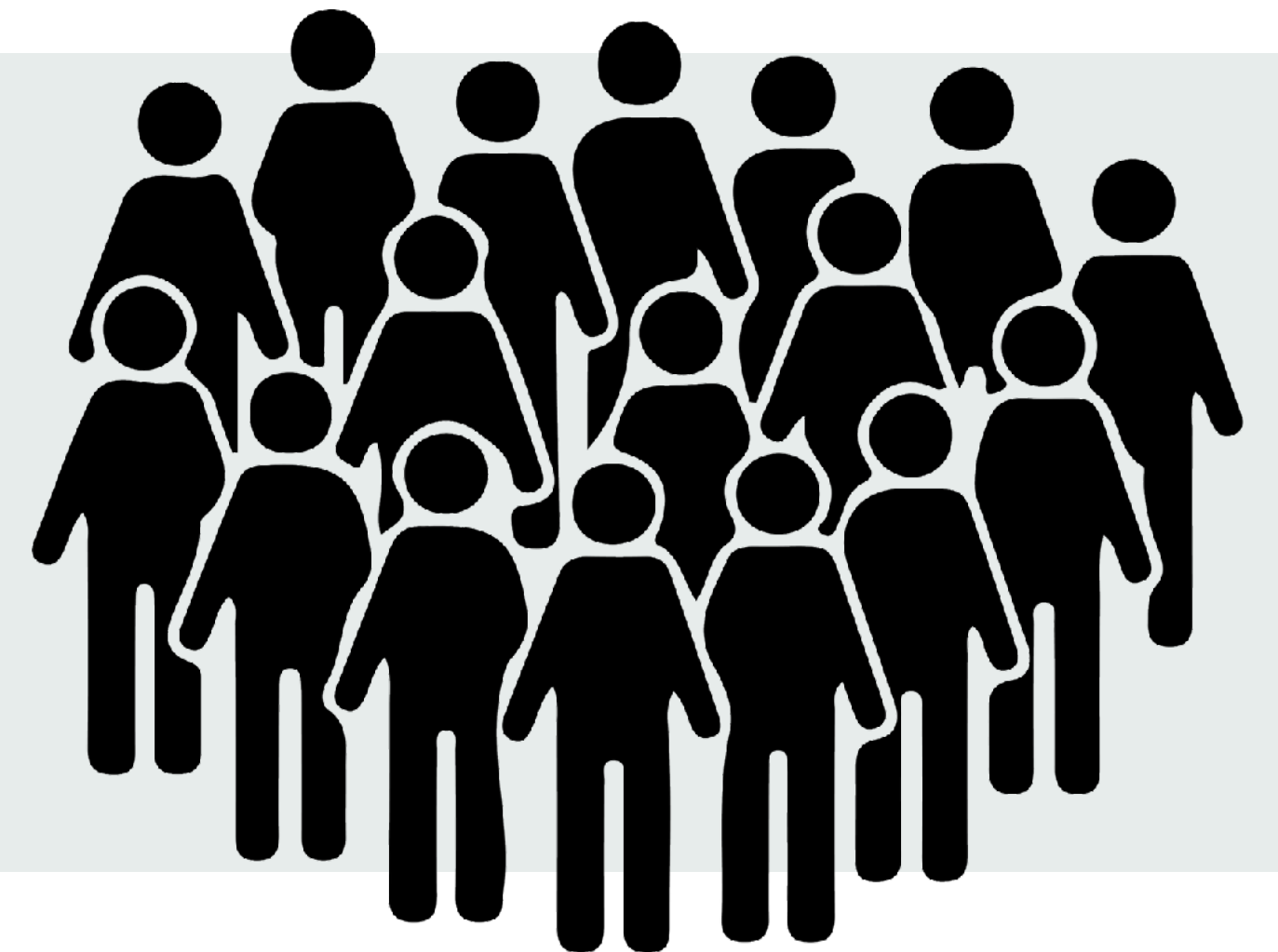
These mobile natives prefer using technology for as many tasks as possible

This generation is far more likely to say this than older generations (74% vs. 63%)



3 in 4 Snapchat Generation users prefer using technology for as many tasks as possible

The Snapchat Generation is nearly twice as likely to say **"my generation can rally large numbers of people to take action"** vs. older generations



They are also much more likely to actually take action. The Snapchat Generation is 1.4x **more likely to post about social causes and issues** than older generations



Fashion & Food Spending

Daily Snapchatters top purchased categories in the last year focused on what they wear to express themselves as well as what they eat - clothing (#1) and shoes (#2), followed by groceries (#3) and dining out (#4).

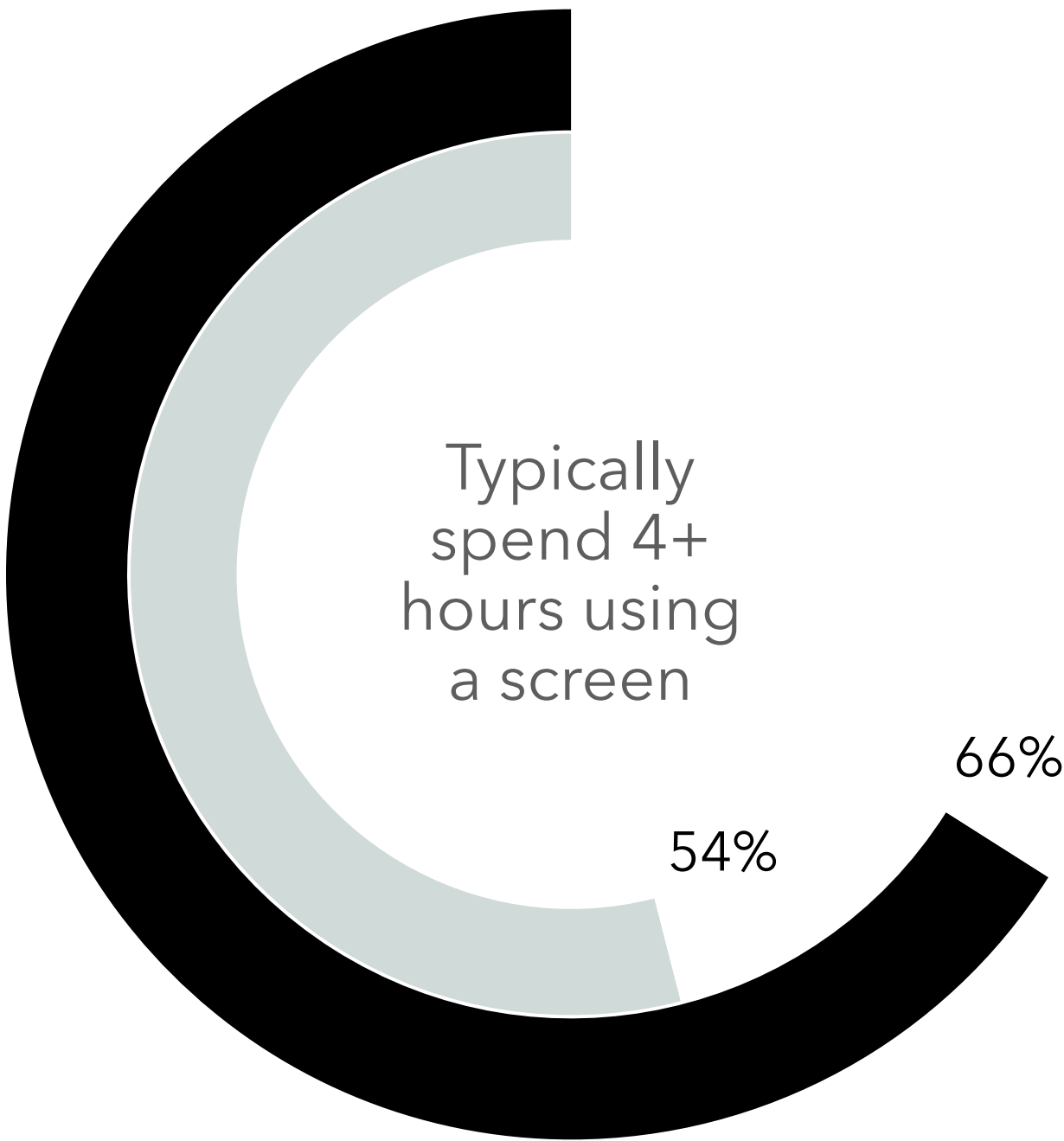
	TOP 10 CATEGORIES PURCHASED IN LAST YEAR
#1	Clothing (79%)
#2	Shoes (72%)
#3	Groceries (70%)
#4	Dining Out (68%)
#5	Non-alcoholic Drinks (65%)
#6	Beauty/Grooming (60%)
#7	Tech and Accessories (56%)
#8	Alcoholic Beverages* (51%)
#9	Accessories, not including shoes (46%)
#10	Health / Wellness (46%)

Time Well Spent

The Snapchat Generation spends more time during a typical week on a screen (e.g., computer, phone, tablet) for entertainment purposes than non-Snapchatters do, and more free time on the weekends boosts their screen time. This entertainment time creates an opportunity to provide them with experiences that give permission to playfully escape and tap into their creativity or provide inspiration for their next venture.

- Snapchat Generation
- Non-Snapchatters

Weekday



Weekend

