

Say Hello to the Snapchat Generation

The Real Story in MENA



ENGINE

CASSANDRA

Who is the Snapchat Generation?	05
How do they Communicate?	16
How do they Shop?	22
How do they Relate?	30
How do they Play?	36

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.

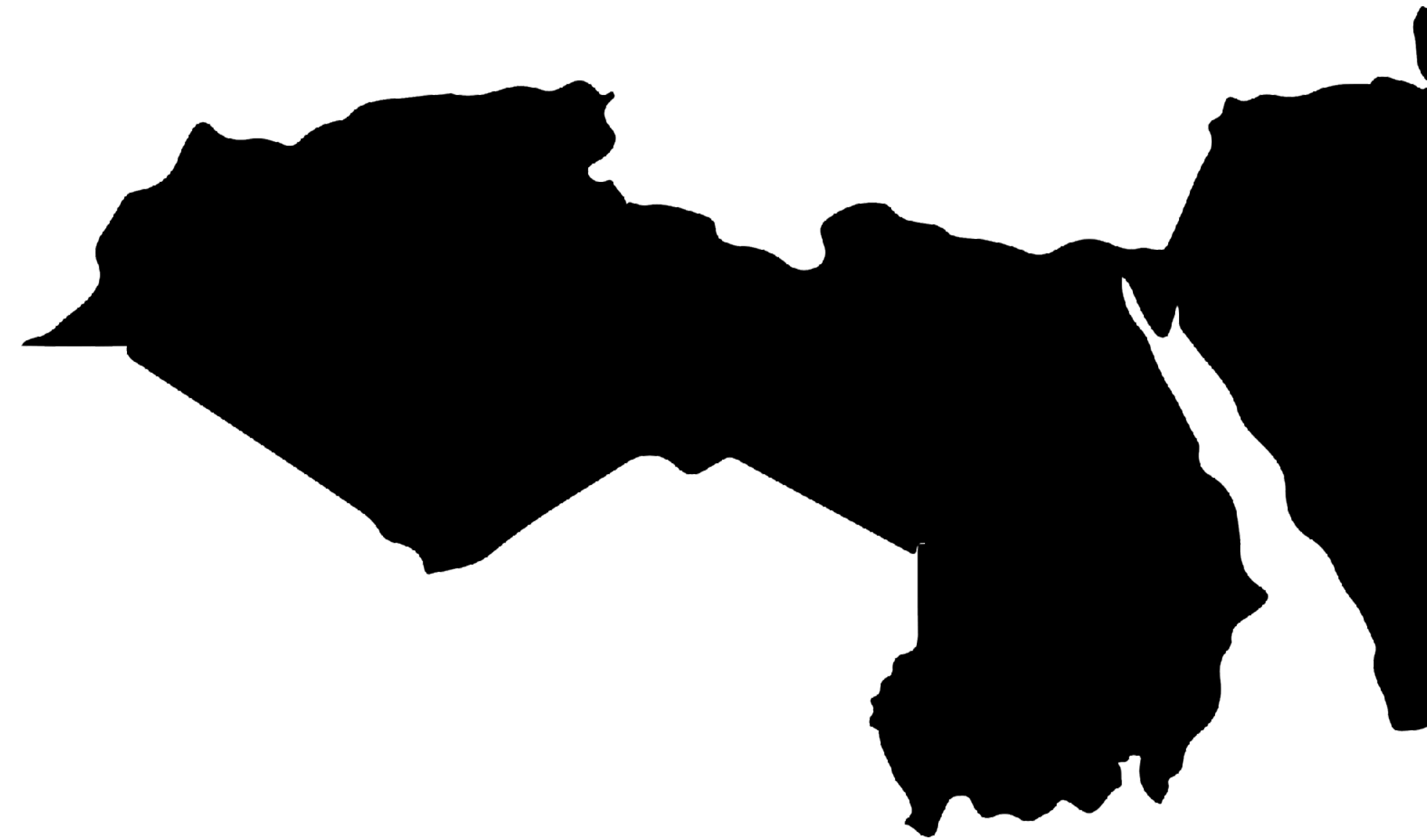


As a result of the pandemic, the Snapchat Generation has a renewed appreciation for friends and family and will carry this deep **need for connection** through as a defining characteristic.

In MENA, a truly global and future-forward generation

The Snapchat Generation is particularly unique in MENA. Family is an essential relationship in this region, but that doesn't mean that there isn't an individual strive as they are more driven, competitive, and image conscious with a preference towards becoming self-employed entrepreneurs. When it comes to defining themselves, the technology they use is part of their identity. Compared to non-Snapchatters, they are more global in their views and interested in the world around them. They also lead in their interest in foreign brands (as well as brand logos), and are significantly ahead in more emerging trends such as using augmented reality to try on products.

The Snapchat Generation within MENA are less likely than their global counterparts to report stress. While holding similar values, the markets in MENA are nuanced as well. In **Saudi Arabia** they have an affinity towards nostalgia. **UAE** is more focused on physical health.



01

Who is the Snapchat Generation?

They value inclusivity.

7 out of 10 in the Snapchat Generation say being inclusive describes them, and they 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 more likely than non-Snapchatters to say that they volunteer, with 3 out of 4 volunteering. They give back through charity and roll up their sleeves to drive social change. They are also more likely to report that their generation is both more liberal and more conservative, than non-Snapchatters, demonstrating a nuanced perspective on political, social, and worldly views.

They are smart and focused.

This generation is both street smart, book smart and is driven to forge a path to success even if it means getting out of their comfort zone. They look to build success off of hard work and are optimistic. Technology helps empower them and they strive to be self-employed entrepreneurs.



Our generation is....

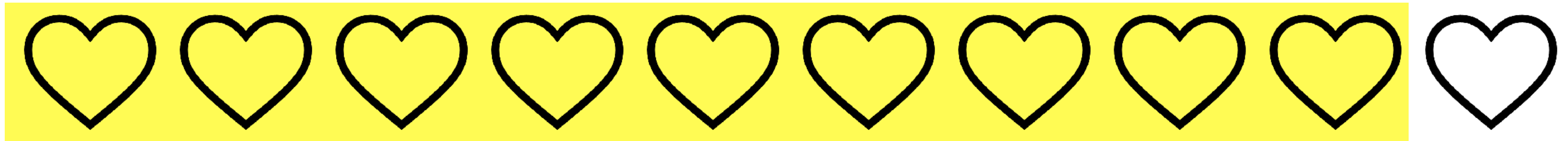
"Pragmatic, respects relationships and loves people, no matter how different our lives can be. We want to be self-starters and discover new means of teaching ourselves and changing our lives."

—Nabiha, a member of the
Snapchat Generation, age 20, UAE

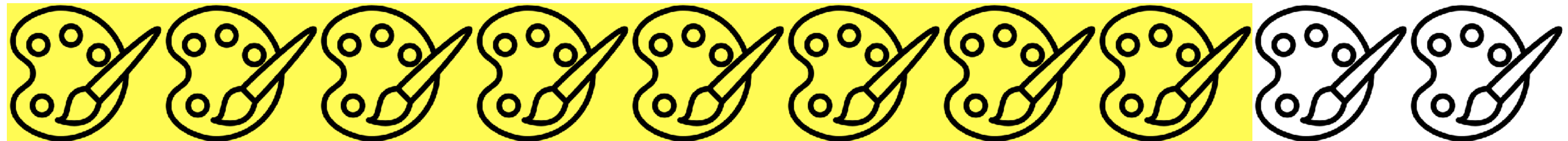


The Snapchat Generation is more likely than non-Snapchatters to view themselves as both kind and creative.

These self descriptors are consistent across MENA as well as the rest of the world. Kindness and Creative are usually ranked #1 and #2.



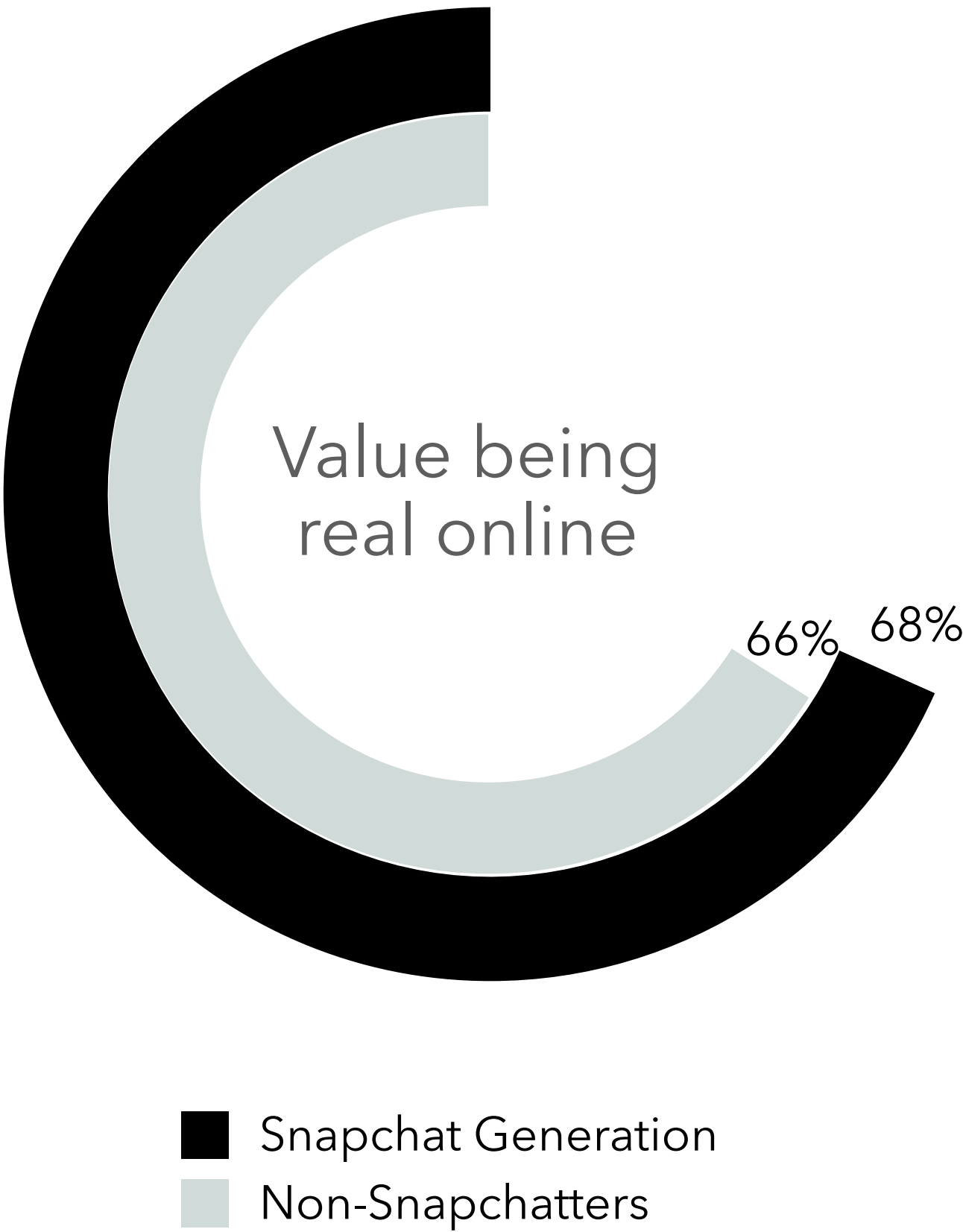
9 out of 10 in the Snapchat Generation describe themselves and their friends as **kind**.



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)”**

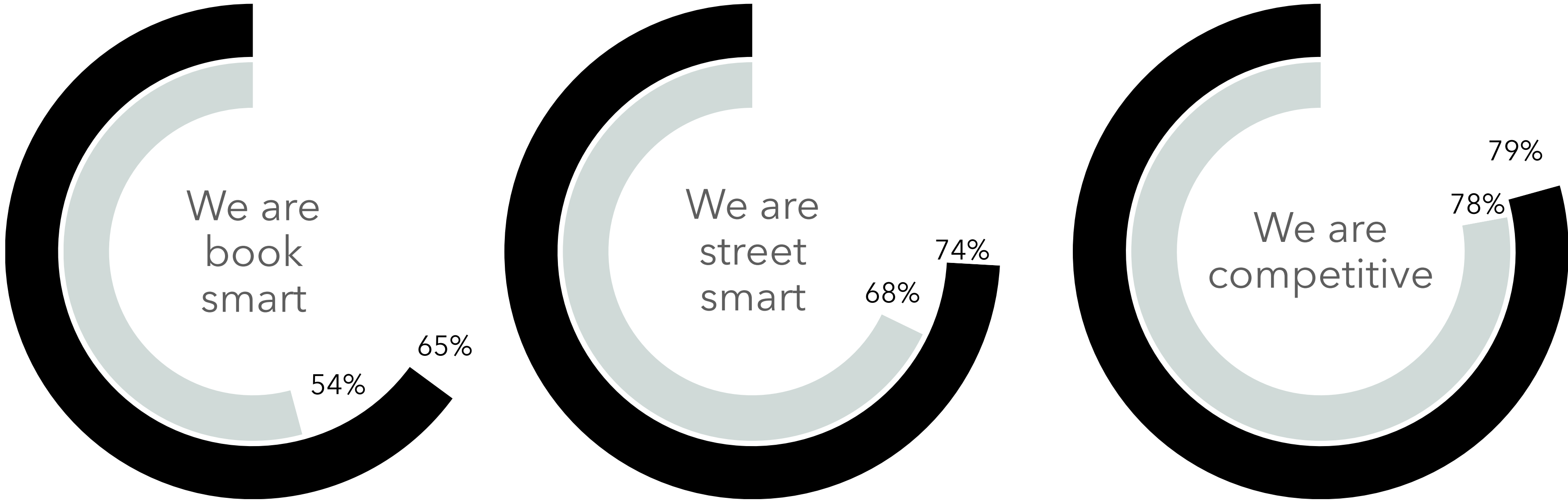


A drive to excel

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.

- Snapchat Generation
- Non-Snapchatters

Self and Friend Descriptors
Completely/Somewhat Agree Summary



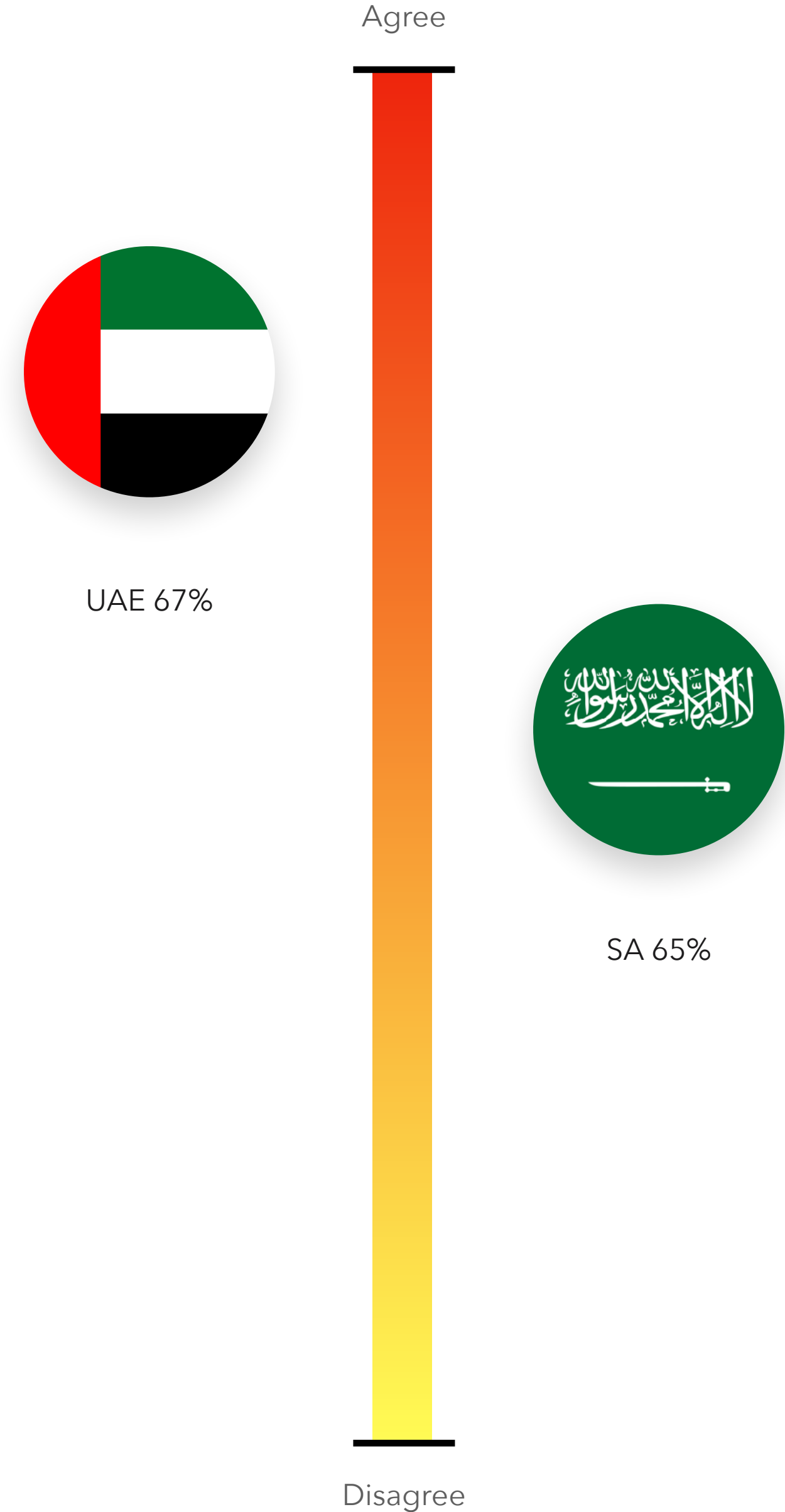
But at what cost? Stress.

The pressures to excel and change the world, coupled with the world they are living in (social injustice, political division, cyber attacks, 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.



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



Happy

(1.2x vs. non-Snapchatters)



Excited

(1.1x vs. non-Snapchatters)



Fulfilled

(1.3x 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.



02

How do they communicate?

The Snapchat Generation is comfortable having uncomfortable conversations.

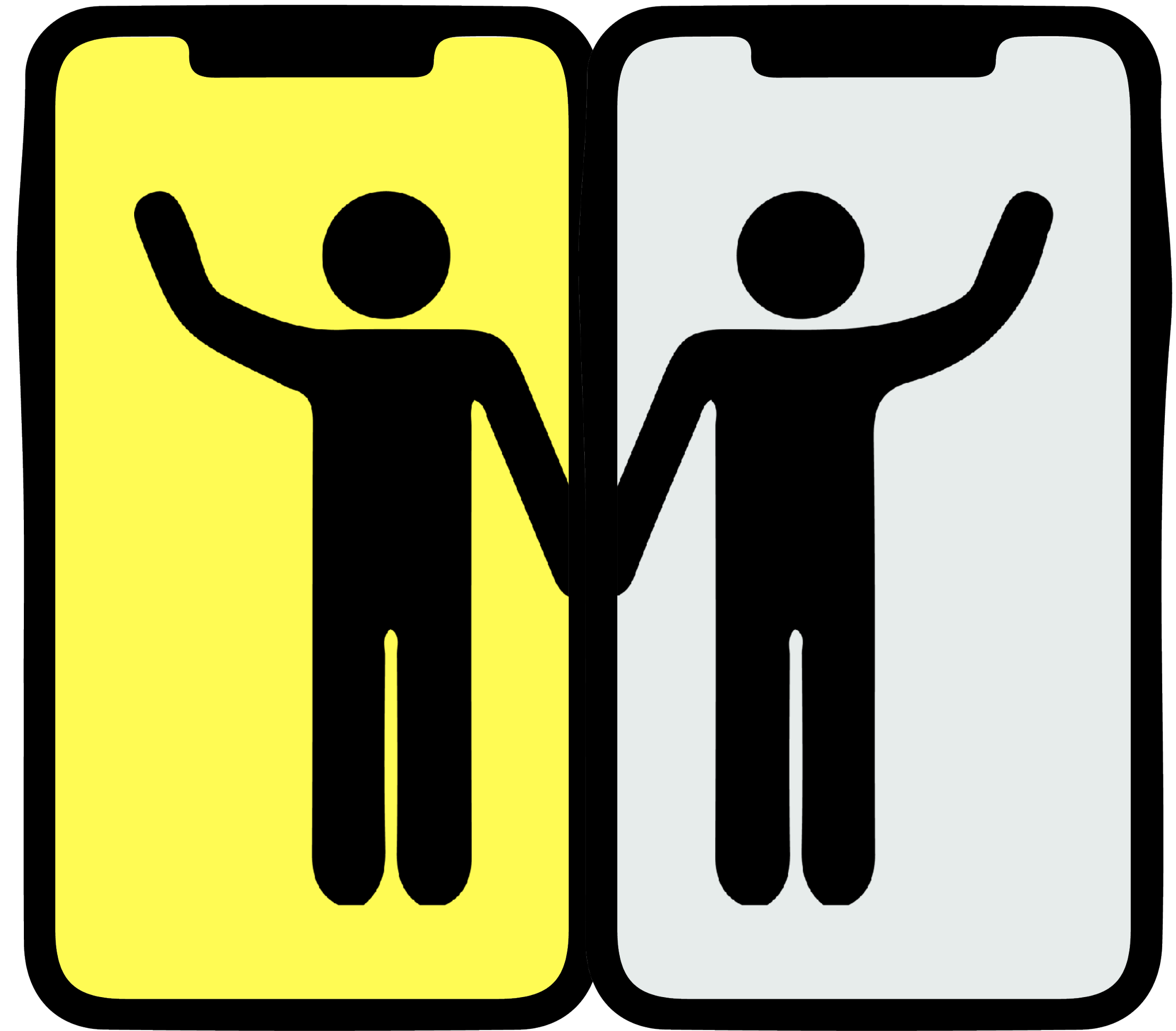
Openness to Discussing Topics



TOPIC	SAUDI ARABIA	UAE
Social Issues/Causes	66%	69%
Mental Health	72%	75%
Race	83%	78%

6 in 10 of the Snapchat Generation feel digital platforms connect them with others

1.2x more likely than Non-Snapchatters

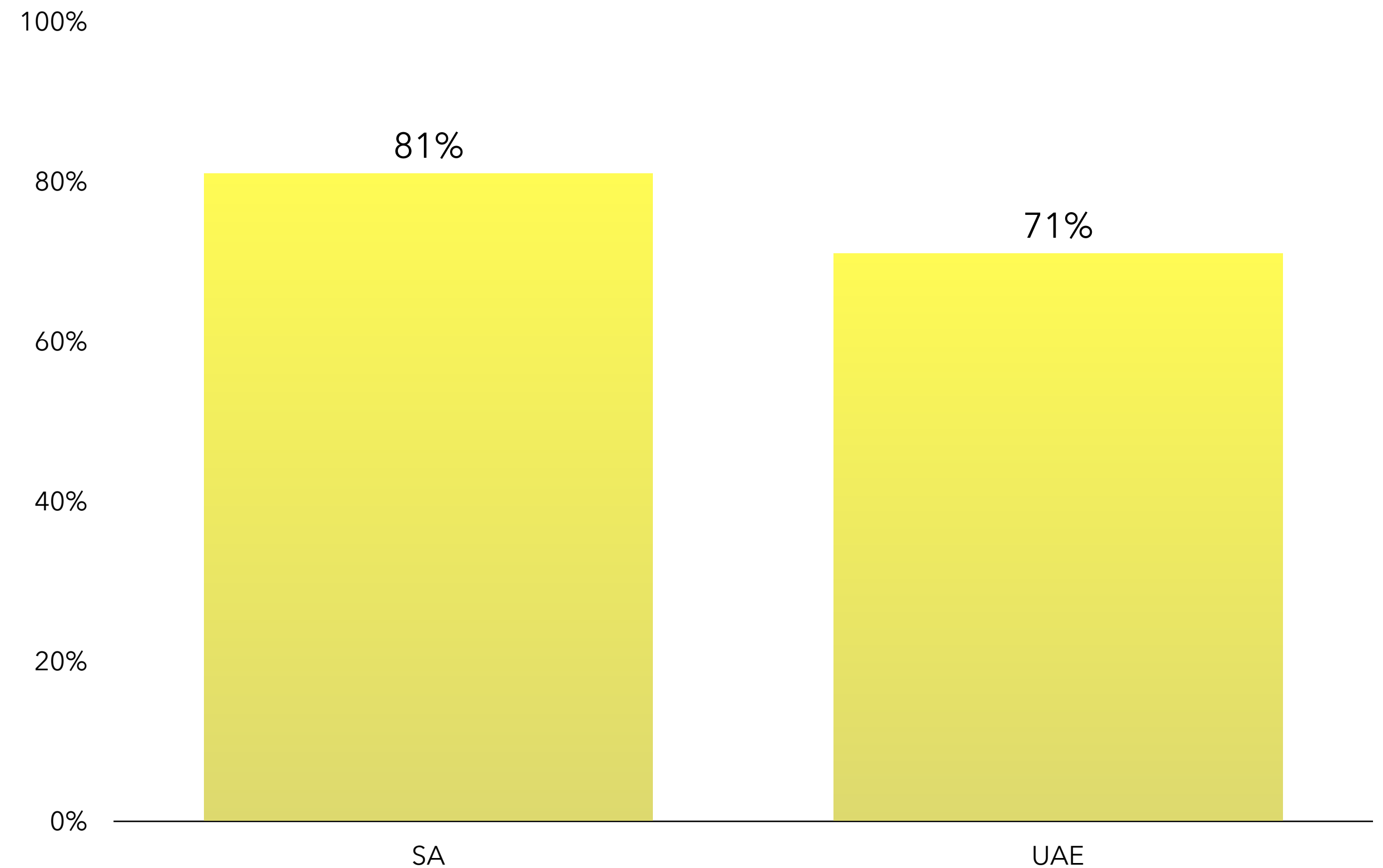


"I volunteer at camps for teenagers and younger students."

—Nabiha, a member of the Snapchat Generation, age 20, UAE

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



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 4 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





03

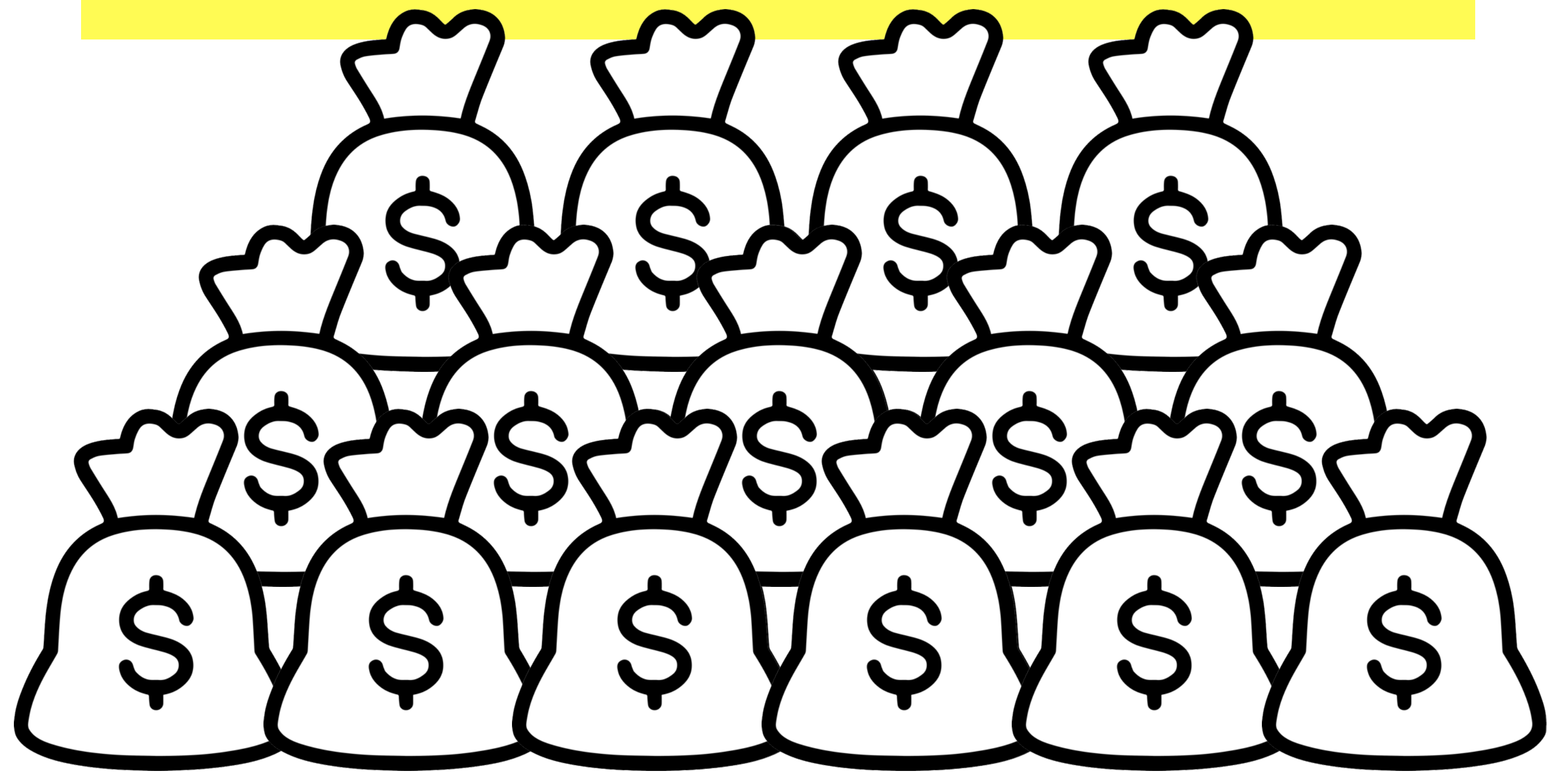
How do they spend?

\$425 Billion

Let's Get Spending

Discretionary spending power for the Snapchat Generation reaches a whopping \$425 billion in MENA.

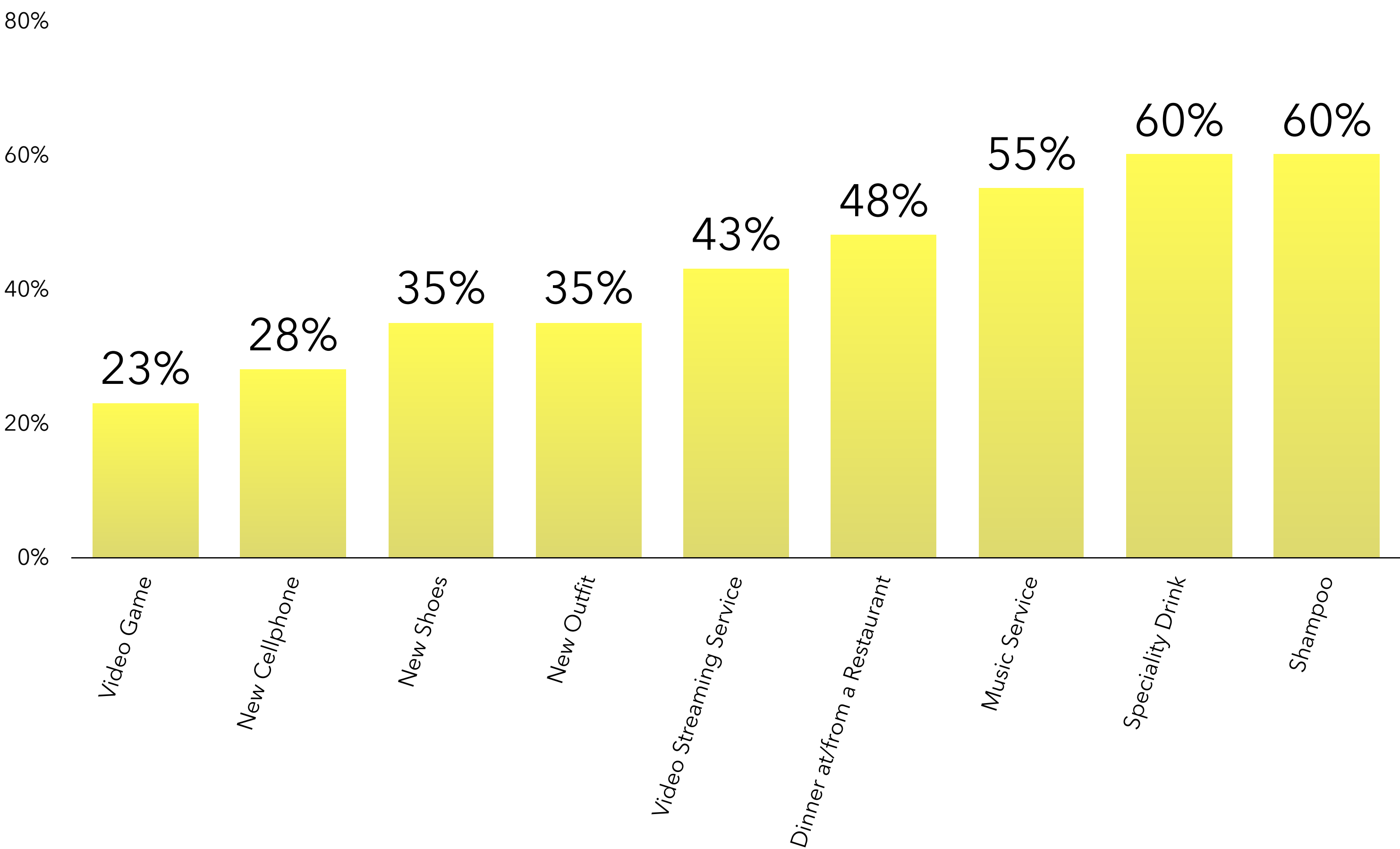
More specifically, 1.4 Trillion Saudi Riyal in Saudi Arabia and 216 Billion AED in UAE.



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



Brands & logos: it matters to the Snapchat Generation in MENA

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

- Agree that having brand name products makes me feel like I fit in (+14)
- Say I like to have clothes and accessories that have brand logos on them (+14)
- Say wearing brand logos help me show my personal identity (+13)
- Agree that important to me to have brand name items (+12)
- Say I feel like I am a part of others' lives via their stories on social, communication, and/or camera apps (+10)



Having brand
named items are
especially
important in
MENA when
compared to the
global Snapchat
Generation.



1.5x

More important



1.4x

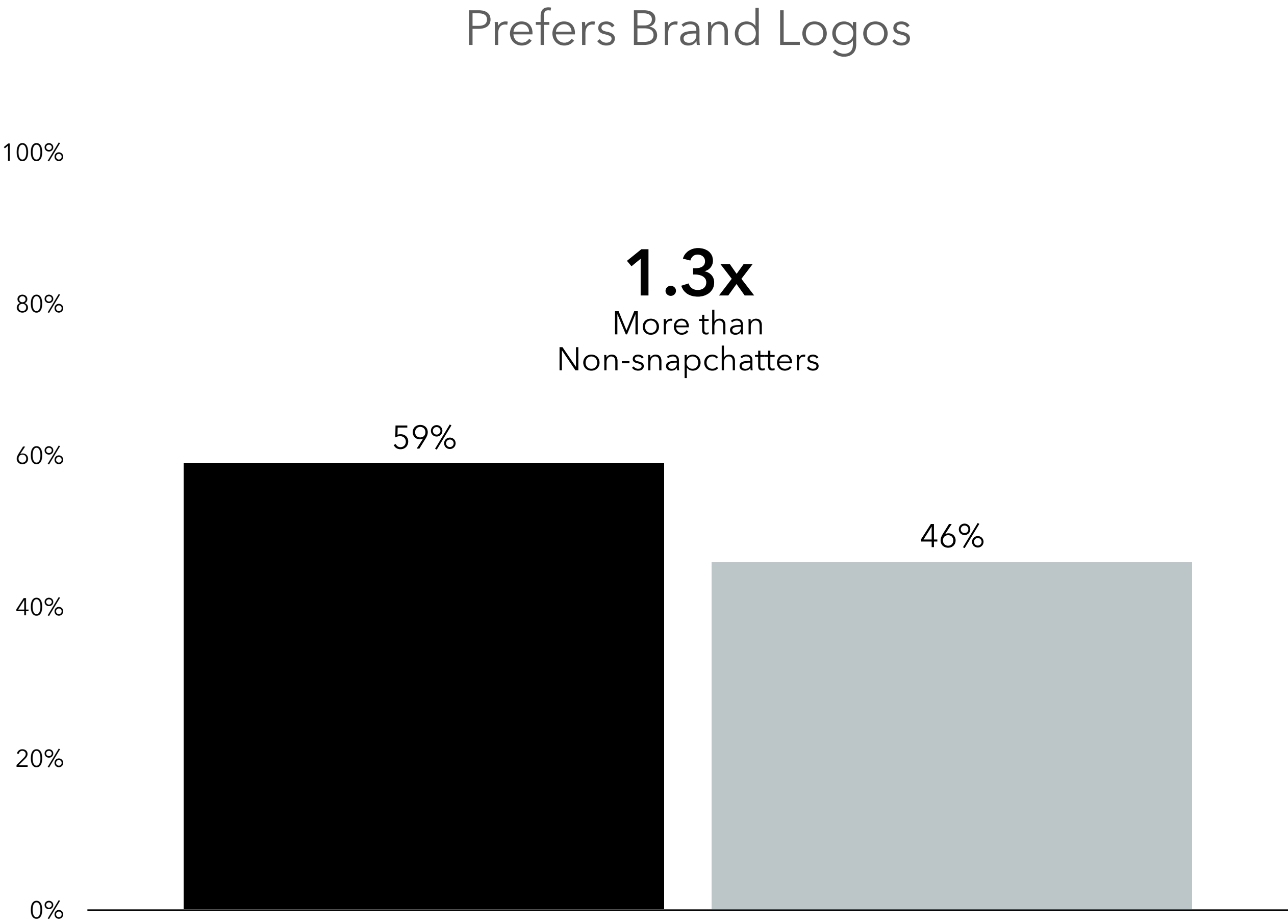
More important



Logos, logos, logos

The Snapchat Generation is more likely to prefer clothes and accessories that have brand logos on them. And 6 in 10 report that having brand name products make them feel like they fit in compared to only 45% of non-Snapchatters.

- Snapchat Generation
- Non-Snapchatters





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

2 in 3

say they want to be self-employed

8 in 10

say it is important to be financially independent

"It is important to continue to improve somehow. Even if you do not benefit from your career, your overall life will surely change. You might also discover your true calling and try new things in your life."

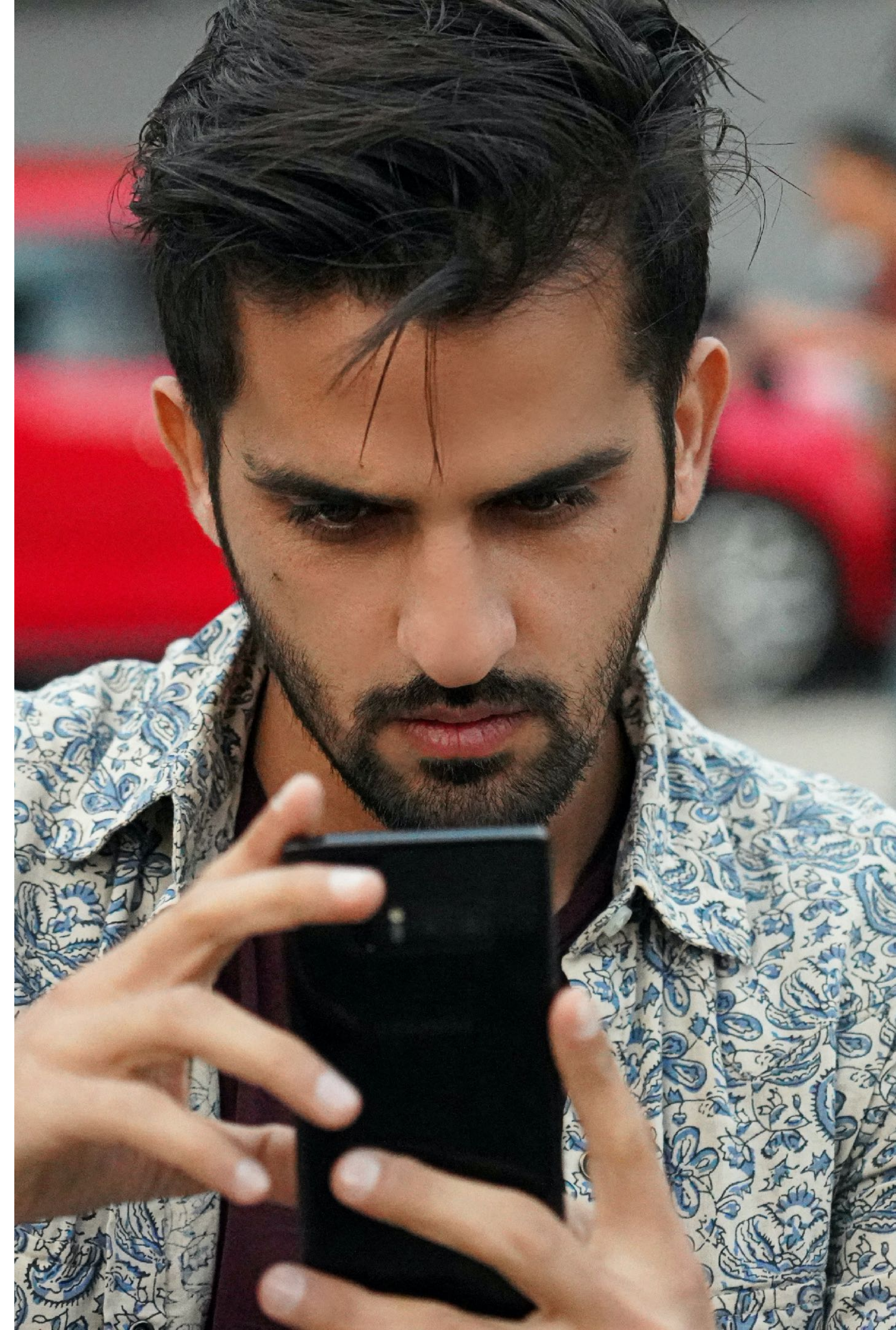
—Nabiha, 20, UAE

"When you're financially stable, you're more of an adult...when you pay your bills by yourself that's when you become an adult"

—Yara, 23, KSA

Next Gen Shopping: Leading on Using Augmented Reality

The Snapchat Generation is 2x more likely than non-Snapchatters to say they are using AR to try on products more than they did one year ago.

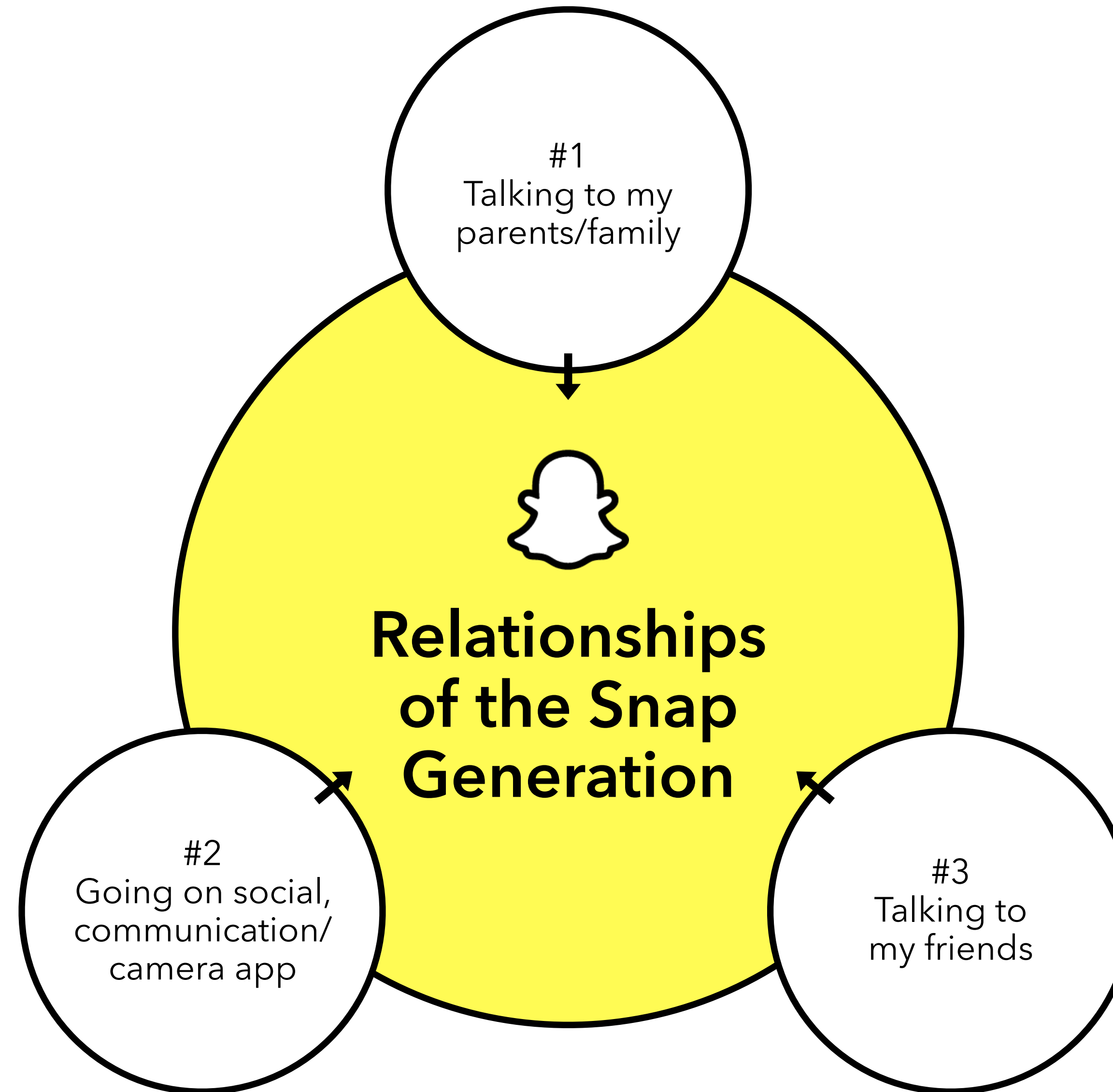




04

**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...



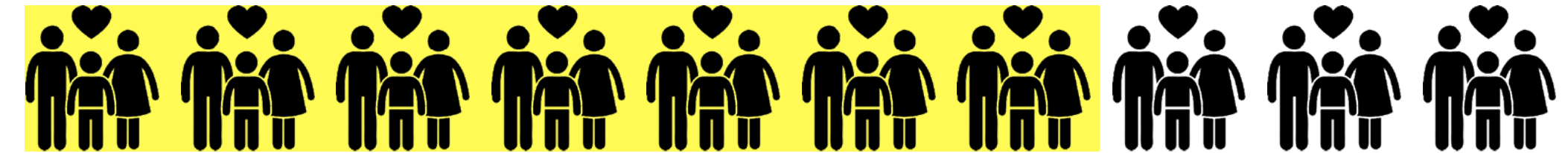
**“Friends don't judge
you they want you
to be always happy.”**

–Yara, a member of the Snapchat Generation, age 23, KSA

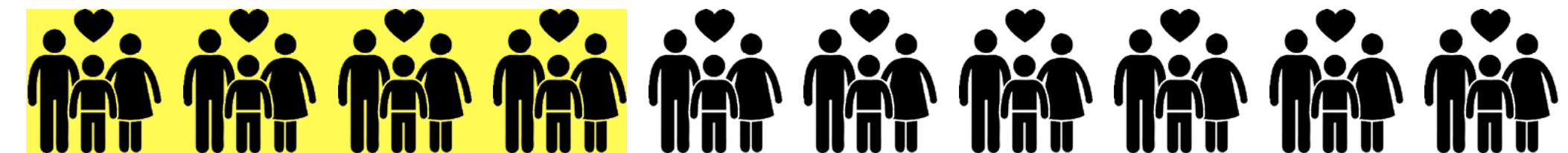


The Snapchat Generation will emerge from the pandemic with a stronger appreciation of family

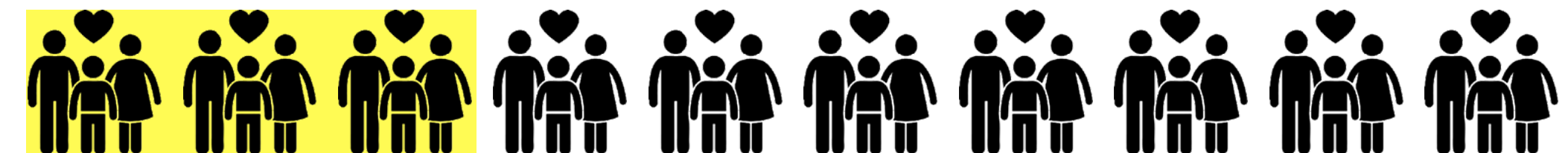
Because this renewed focus and appreciation on friends, family, and relationships is happening during their formative years, it will likely carry forward into adulthood and become a new, defining characteristic for this generation



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



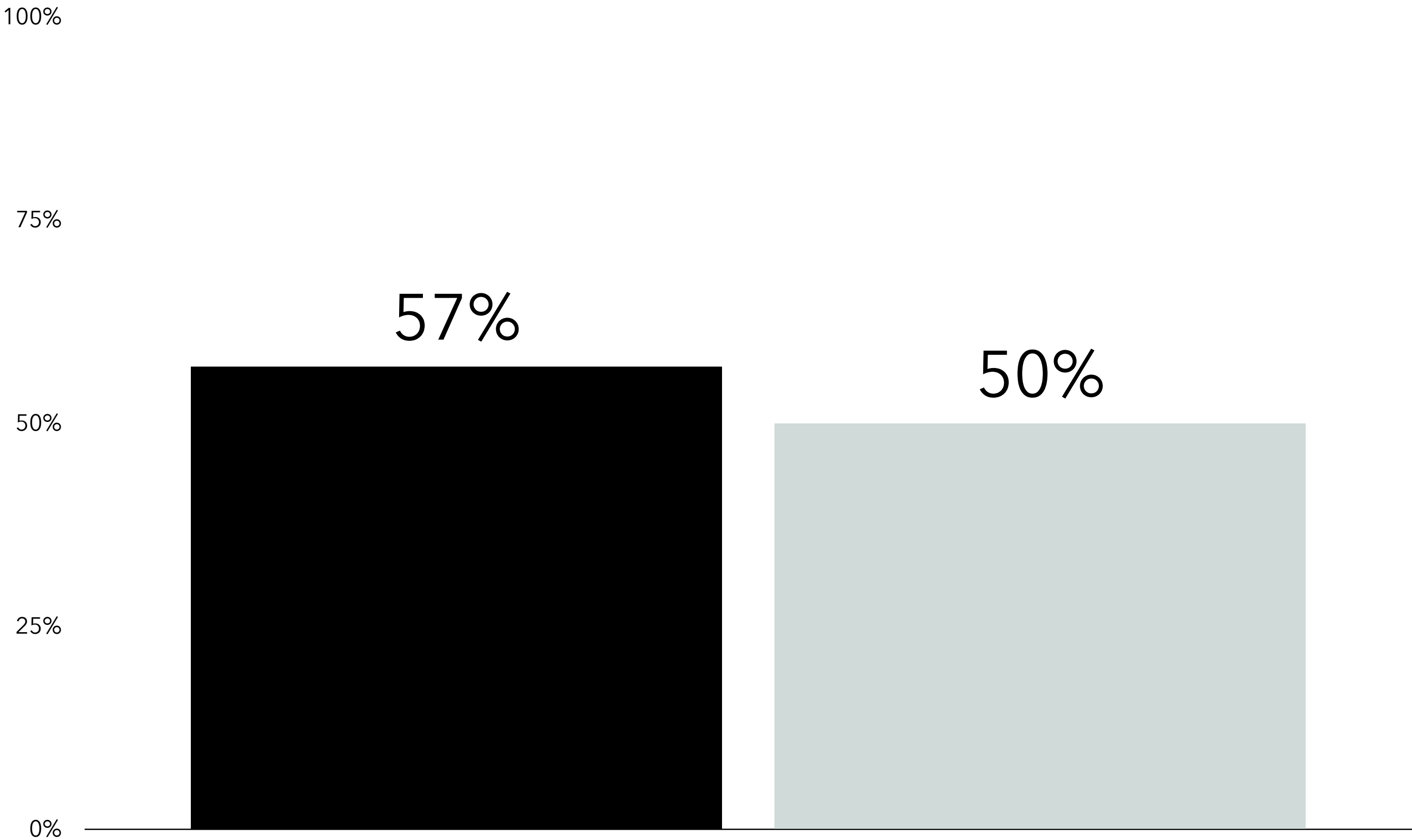
3 out of 10 are friends with/follow their parents on social, communication, camera apps

Constantly Evolving and Growing

The Snapchat Generation is taking in information from a variety of sources and learning. This 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.

- Snapchat Generation
- Non-Snapchatters

“I delete things I’ve posted online if they don’t reflect my opinions anymore”
Completely/Somewhat Agree Summary





05

How do they play?

The Snapchat Generation is seeking out moments of levity, joy, silliness, and plain old fun in order to recharge.

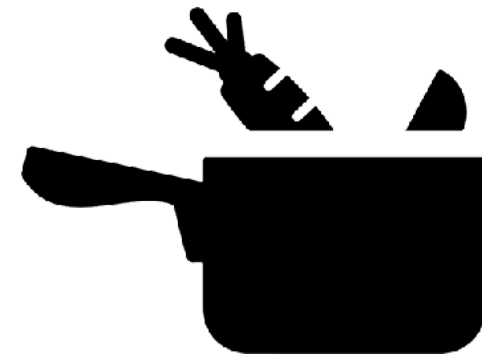
This includes the entertainment they consume, the digital media they depend on, and the hobbies they're taking up as they spend more time than ever at home. They are channeling their energy into creativity and connection, building skills and confidence that they will carry with them into the future,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

"I do poetry as a way to declutter my mind and the stress of the entire week"
–Nabiha, a member of the Snapchat Generation, 20, UAE



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 and grooming 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

Enjoying more time in nature



6 out of 10

Say dressing up is fun

6 in 10 of the Snapchat Generation agree that gaming is a productive activity (1.8X more likely to agree than non-Snapchatters)

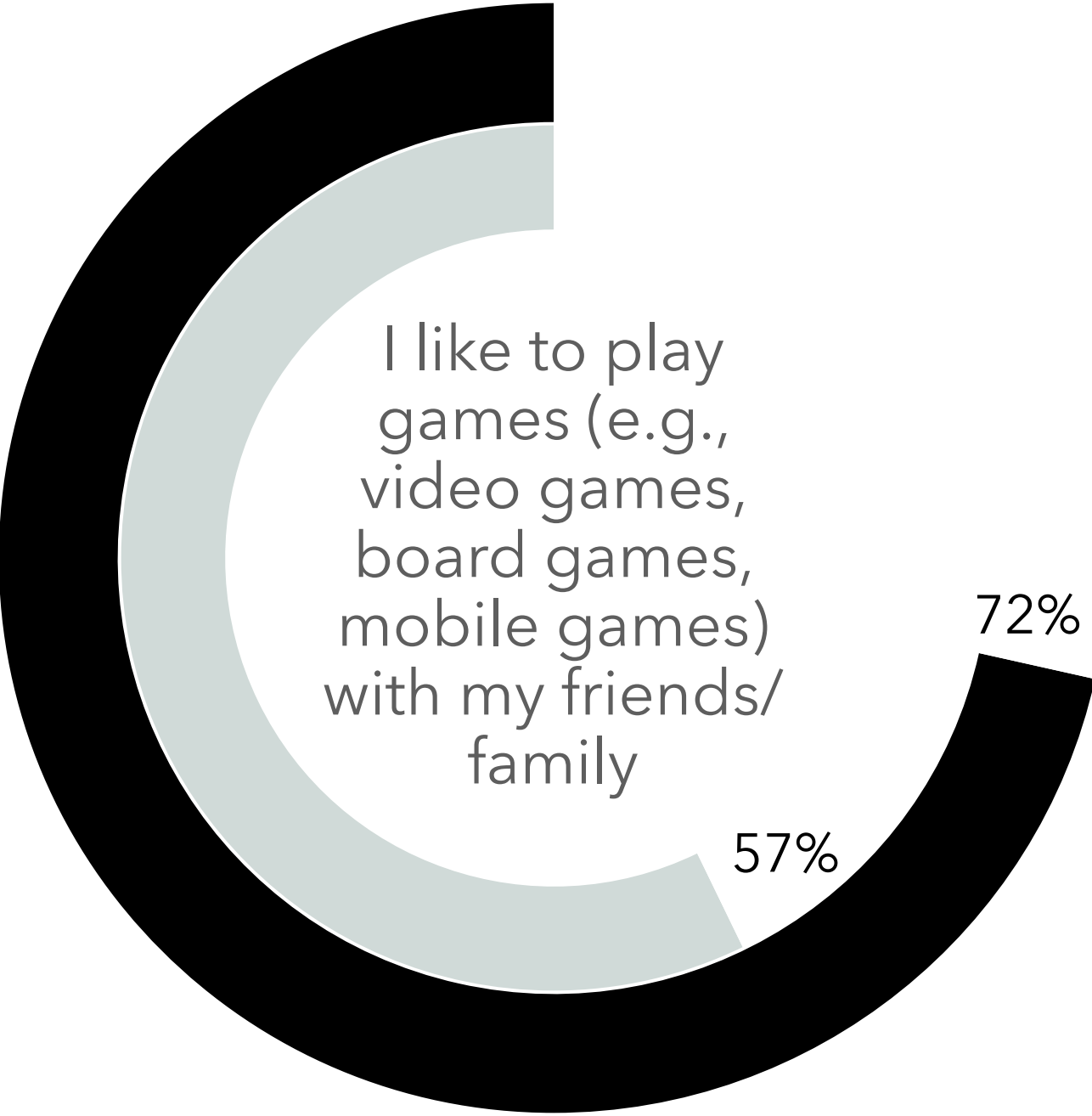
Gaming can create a fun way to learn new skills such as a new language or how to train parts of your brain not typically used.



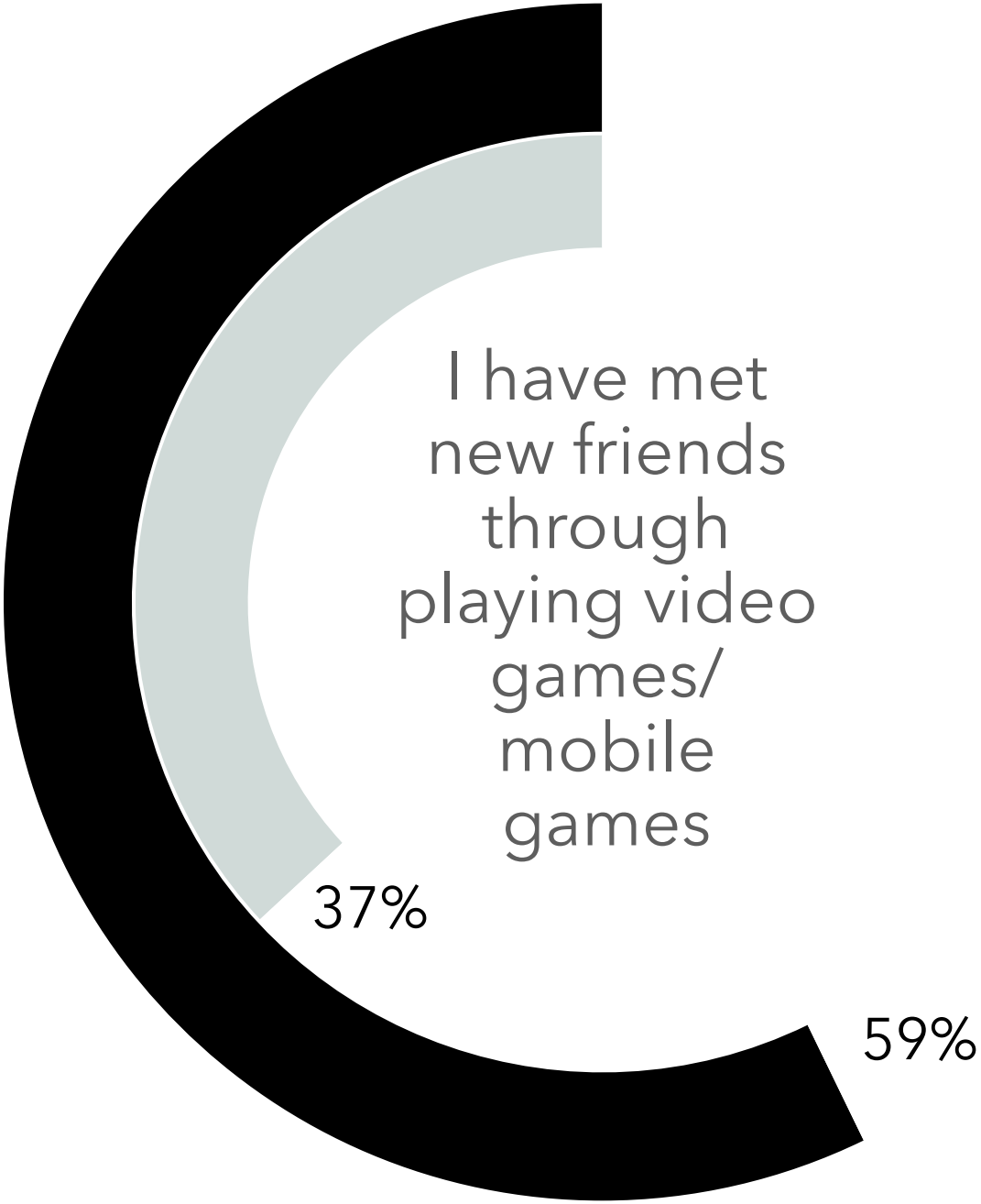
Community Through Gaming

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.

- Snapchat Generation
- Non-Snapchatters



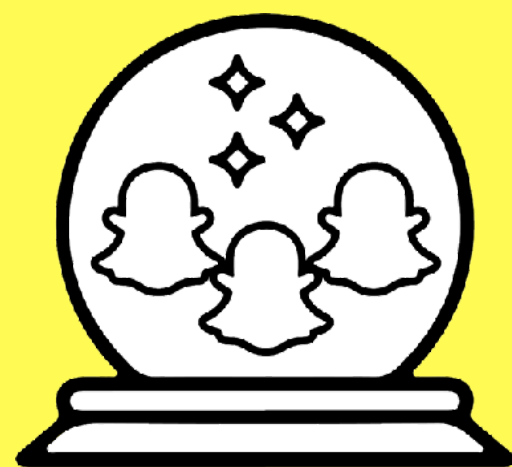
Snapchat Generation
Men: 74%
Women: 69%



Snapchat Generation
Men: 64%
Women: 56%

The Snapchat Generation is 1.4X more likely than non-Snapchatters to gravitate to immersive video & mobile games, including AR experiences





The Snapchat Generation will define the future.

With \$425 billion 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 change agents	How can you be an ally and activist?
They crave 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!

