

Say Hello to the Snapchat Generation

The Real Story in APAC



ENGINE

CASSANDRA

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Key Findings from around the Globe



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 APAC, a truly global and future-forward generation

The Snapchat Generation is particularly unique in APAC. Compared to non-Snapchatters, they are more global in their views and interest in the world around them, they 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 in Asia truly embraces digital media as a transformative tool to empower them to change the world.

While global in their affinities, the markets in Asia are also diverse. In **Malaysia**, there is a strong focus on school, education and making one's family proud. Caring for the environment emerges as a top descriptor for the Snapchat Generation in **Indonesia**. **Australians** are notable for their optimism about digital transformation. Competitive and hard working are top descriptors for the Snapchat Generation in **India**. And **Japan** is the market to watch in terms of utilizing new technologies.



01

Who is the Snapchat Generation?

Continually Challenging Themselves

**"I am always
pushing myself
outside of my
comfort zone."**

–Julia, 21, Australia



They are inclusive, hard working and care about the world around them.

7 out of 10 in the Snapchat Generation in APAC 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. 8 out of 10 say that they care about the environment (9 out of 10 in both India and Malaysia) and 8 out of 10 say they are hard workers.

They are wise & worldly.

8 out of 10 say they are informed about world events and news. They are 1.4X 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 6 in 10 of non-Snapchatters). Yet, the Snapchat Generation is playful when it comes to their online presence, they are almost 1.7X 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.



In APAC, 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.

In Australia & Malaysia, the “music I listen to” is the top definition of self; in Japan, India and Indonesia it is the “clothes I wear”.

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

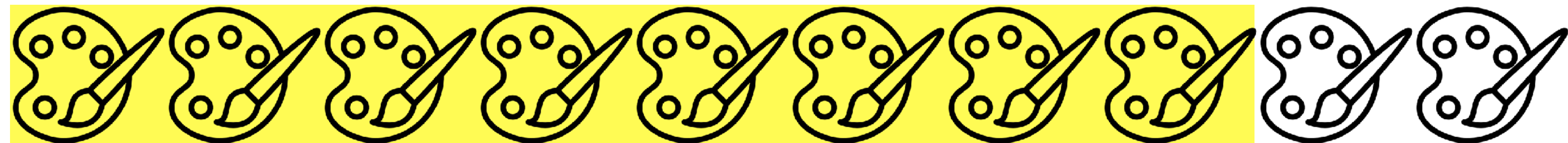
The technology I use | My hairstyle



Kindness and creative are the top descriptors of the Snapchat Generation in Asia.

In Australia, members of the Snapchat Generation are 1.2X more likely than non-Snapchatters to agree that their generation is creative. In Japan, the Snapchat Generation is 1.2X more likely than non-Snapchatters to agree that they are kind.

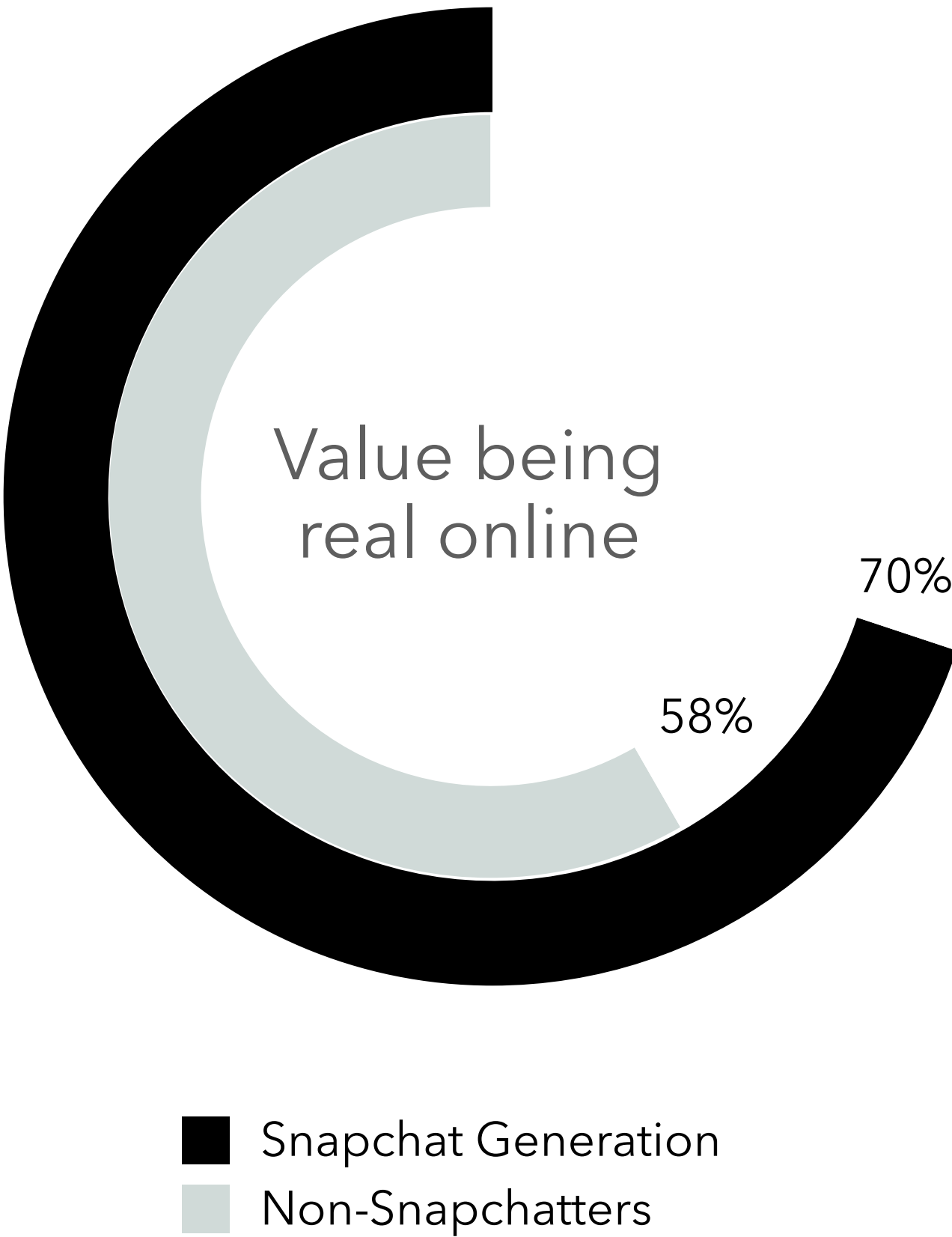
9 out of 10 in the Snapchat Generation in APAC describe themselves and their friends as **kind**.



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
in APAC agree,

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



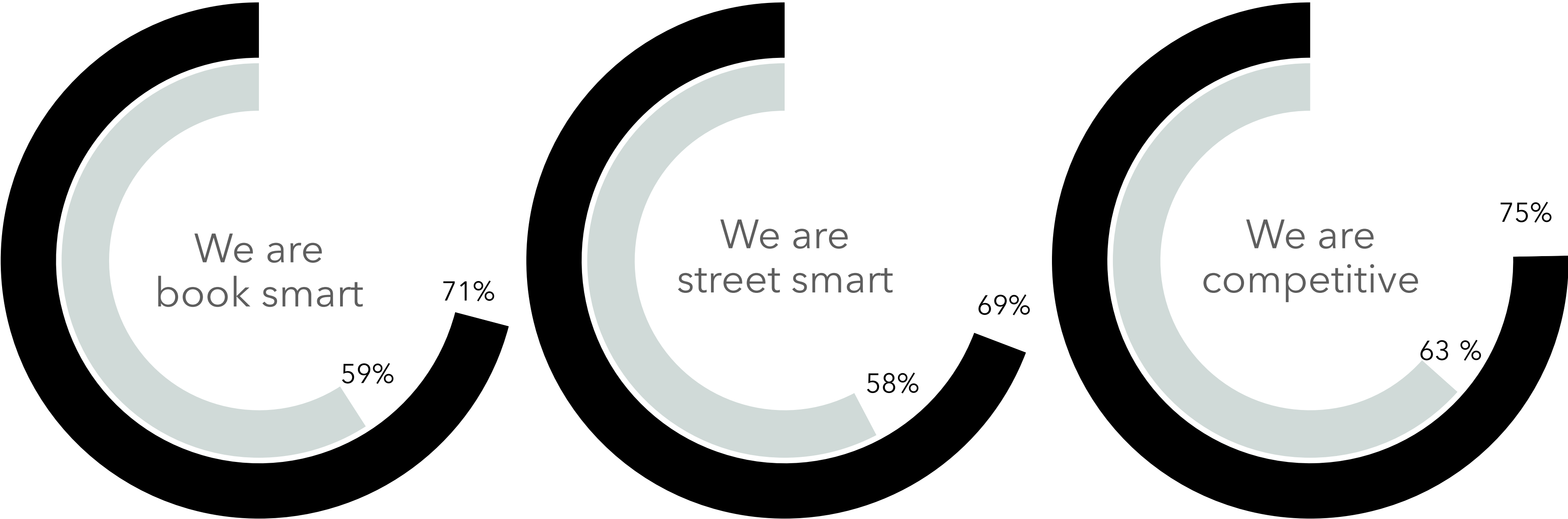
A drive to excel

Seeing themselves as both street *and* book smart, the Snapchat Generation is driven to excel. 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.

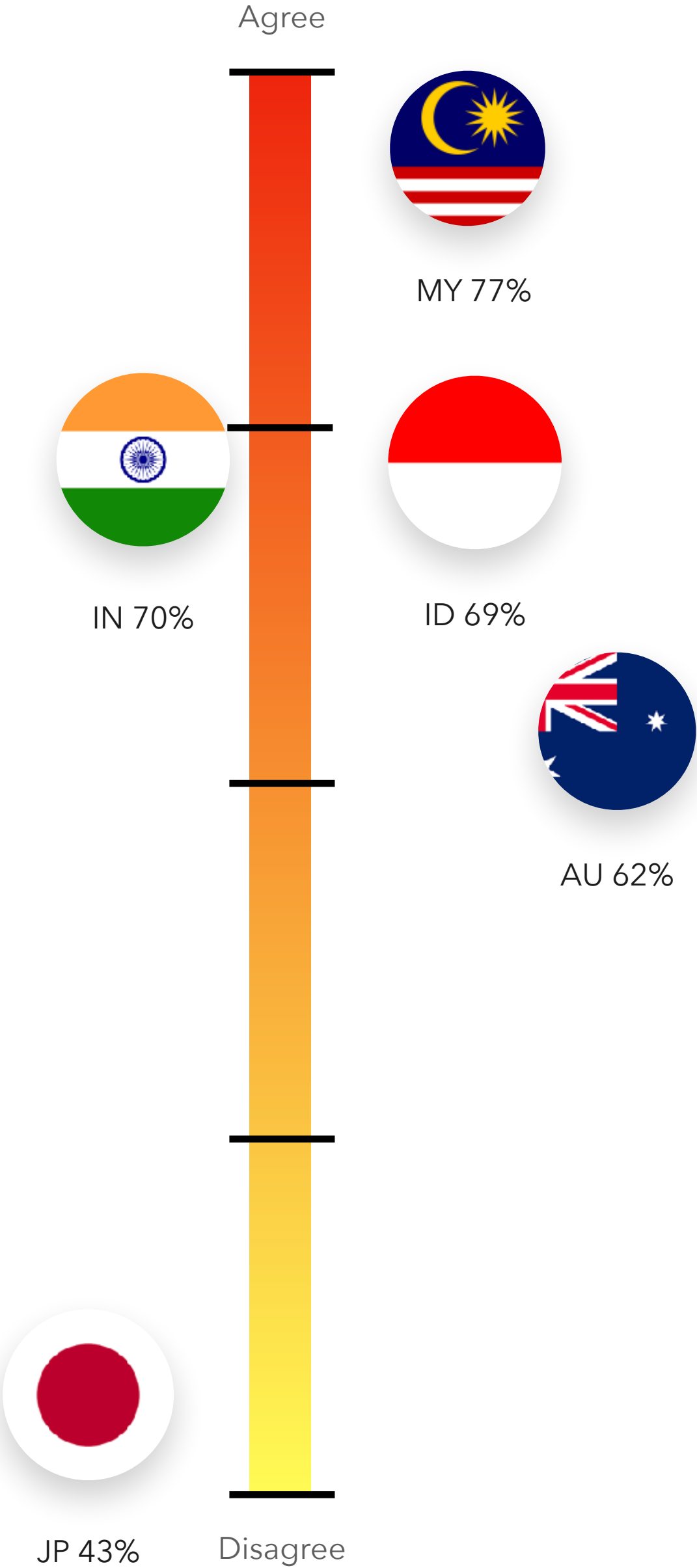
The pressures to excel and change the world, coupled with the world they are living in (terrorism, climate change, and now a pandemic) inevitably lead this generation to be stressed out.



“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 43% in Japan.



53% of the Snapchat Generation in APAC feels stress on a weekly or daily basis

(v. 44% for non-Snapchatters)

	TOP CAUSES OF STRESS
#1	Covid-19/the pandemic (57%)
#2	Money (50%)
#3	Not getting enough sleep (41%)
#4	School/work (41%)
#5	My health/fitness (32%)

Understanding Stress by Market



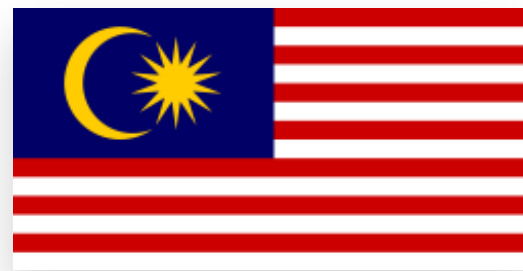
In India, social issues (e.g., racism, homelessness) are more a source of stress for the Snapchat Generation. They are less likely than non-Snapchatters to say that money is a source of stress (49% vs. 54%).



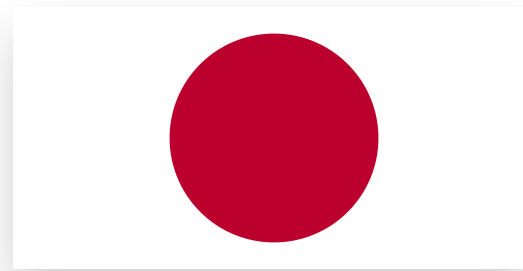
In Australia, those in the Snapchat Generation are less likely to report that the pandemic is a source of stress (48% vs 55% for non-Snapchatters, but more likely to say health matters - not getting enough sleep, weight and fitness are stressors.



The Snapchat Generation in Indonesia reports the least stress in the region (47% state that they experience stress only rarely or never). They are, however, significantly more likely to cite Covid as their top stressor (66% vs 58%).



School & work are more likely to be stressors for members of the Snapchat Generation in Malaysia (who, like Indonesia, report relatively lower levels of stress - 27% report rarely or never experiencing stress.



Japan bucks the global and regional trends in terms of stress. The top stressor is school/work followed by money. The Covid pandemic comes in at number 3.

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



Hopeful

(1.2x vs. non-Snapchatters)



Happy

(1.5x vs. non-Snapchatters)



Excited

(1.6x vs. non-Snapchatters)



Fulfilled

(1.7x vs. non-Snapchatters)

In Australia, the Snapchat Generation is particularly hopeful, 1.6X that of non-Snapchatters



The Snapchat Generation in APAC moves forward with confidence.



7 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.

“Our lifestyles have changed drastically this year and honestly it once took a toll on my mental health.

Looking on the bright side however, we have now learned to appreciate even the smallest things in life that did not seem like a big thing before (like having classes on campus and meeting friends physically). So with that, I am hoping to enter the new year with gratitude and I believe that everything will eventually be fine in the end. Looking forward to happier days in 2021!”

—Hui, 20, Malaysia





02

How do they communicate?

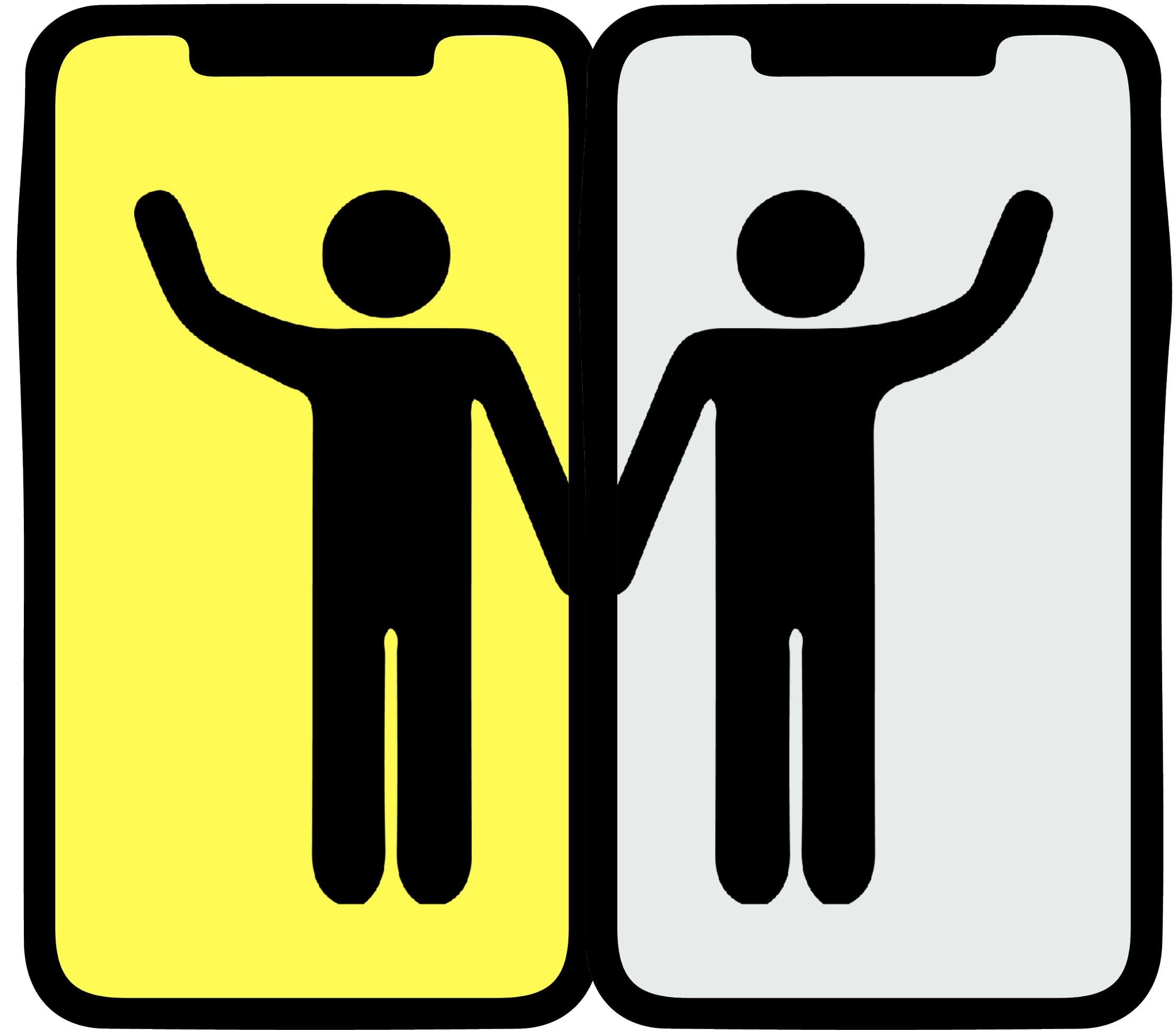
"We grew up with technology & internet, so we can learn about anything from the internet and we tend to be more creative and awake with current social issues."

–Alexandra Claudia, 19, India



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

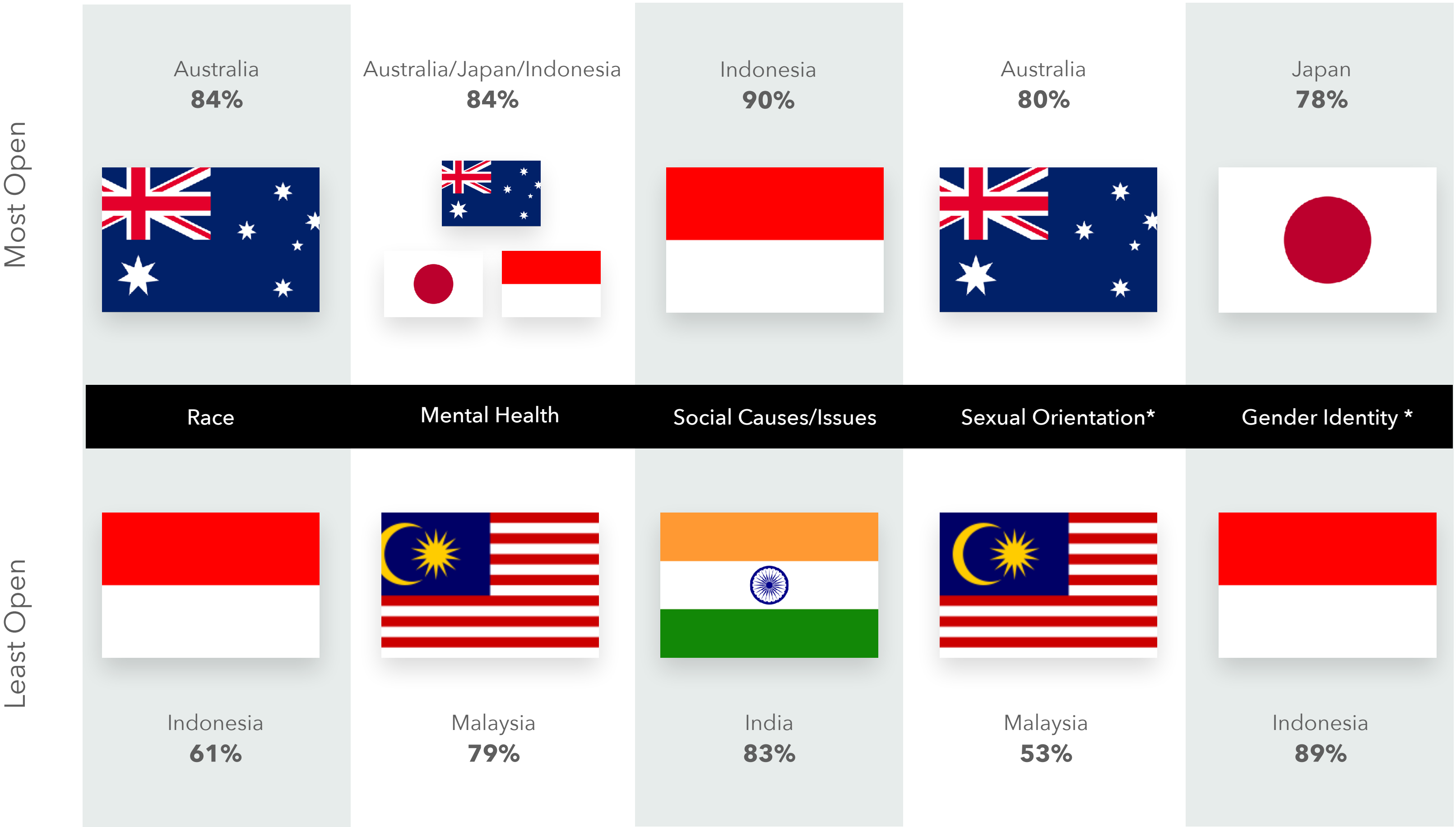
+23 pts from Non-Snapchatters



Having uncomfortable conversations in APAC.

Even in the least open countries, more than half are open to discussing difficult topics. Indonesia and Malaysia are the most conservative when it comes to topics of sexual orientation.

Countries Most Open to Discussing vs. Least Open

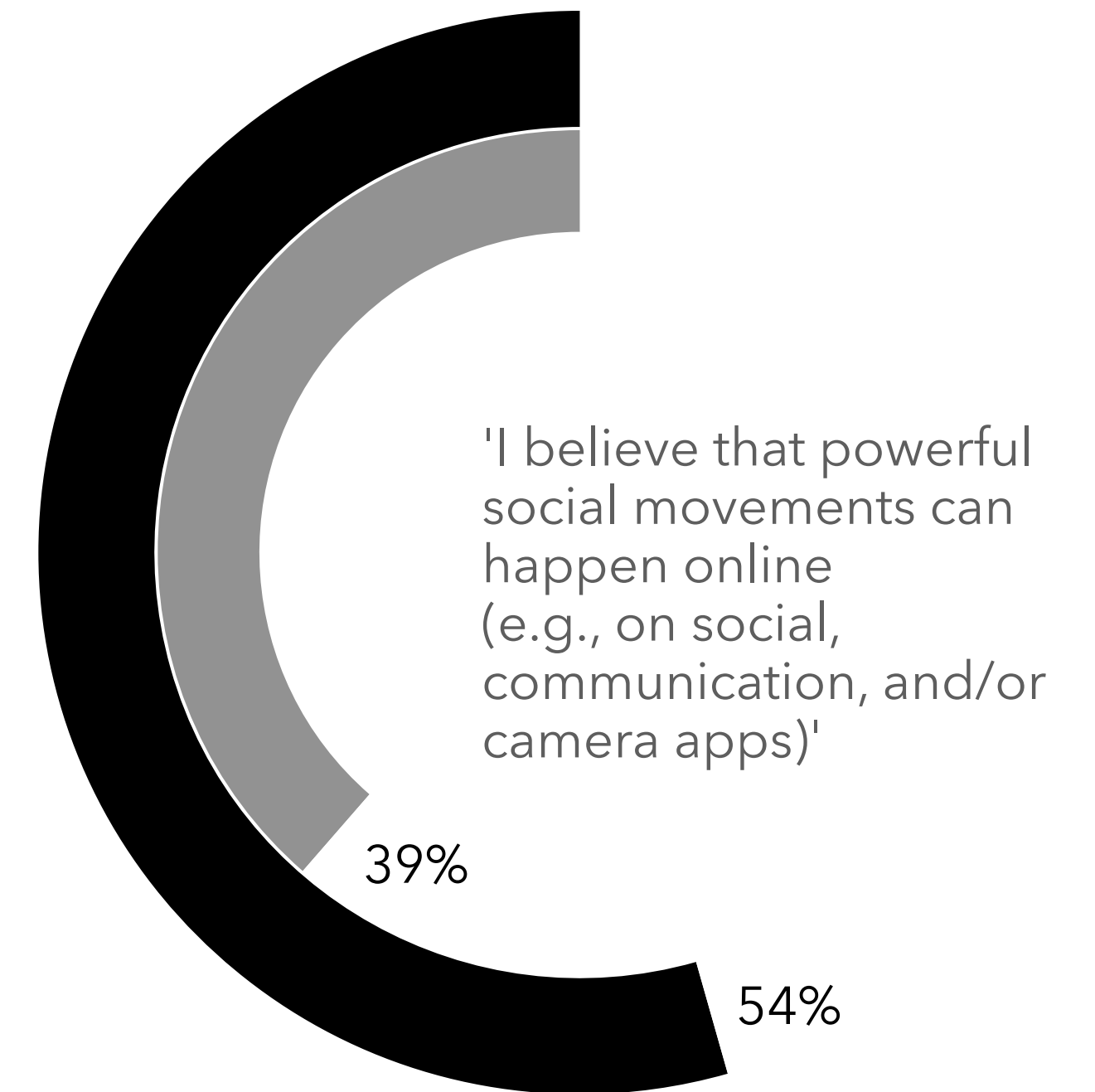
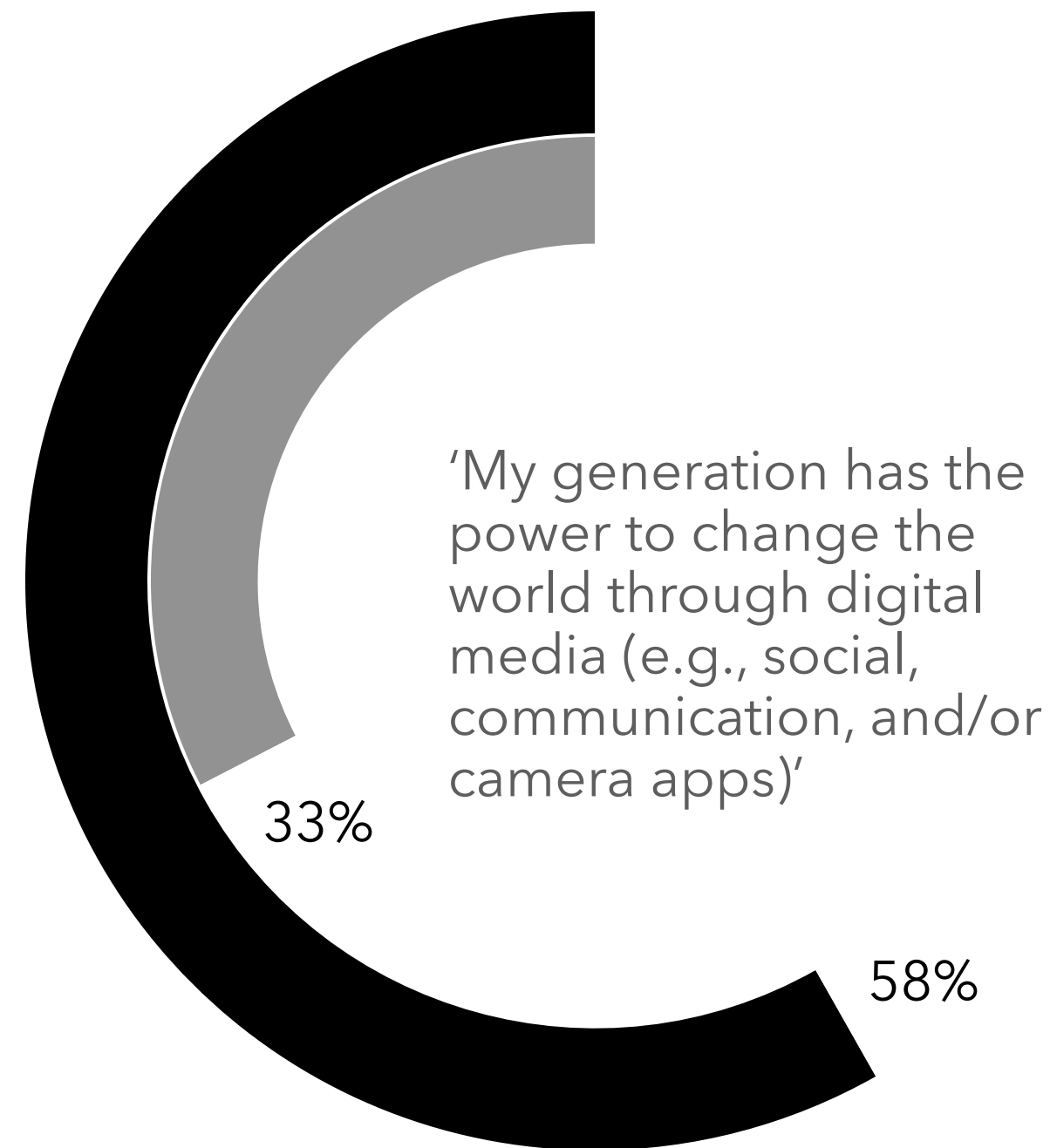


Digital communication is the tool

that empowers the Snapchat Generation to **change the world** - fueling their activism and volunteerism.

This is particularly true in Australia, where members of the Snapchat Generation are 2X more likely than non-Snapchatters to believe that powerful social movements can happen online and 2.6X more likely to agree that their generation has the power to change the world through digital media.

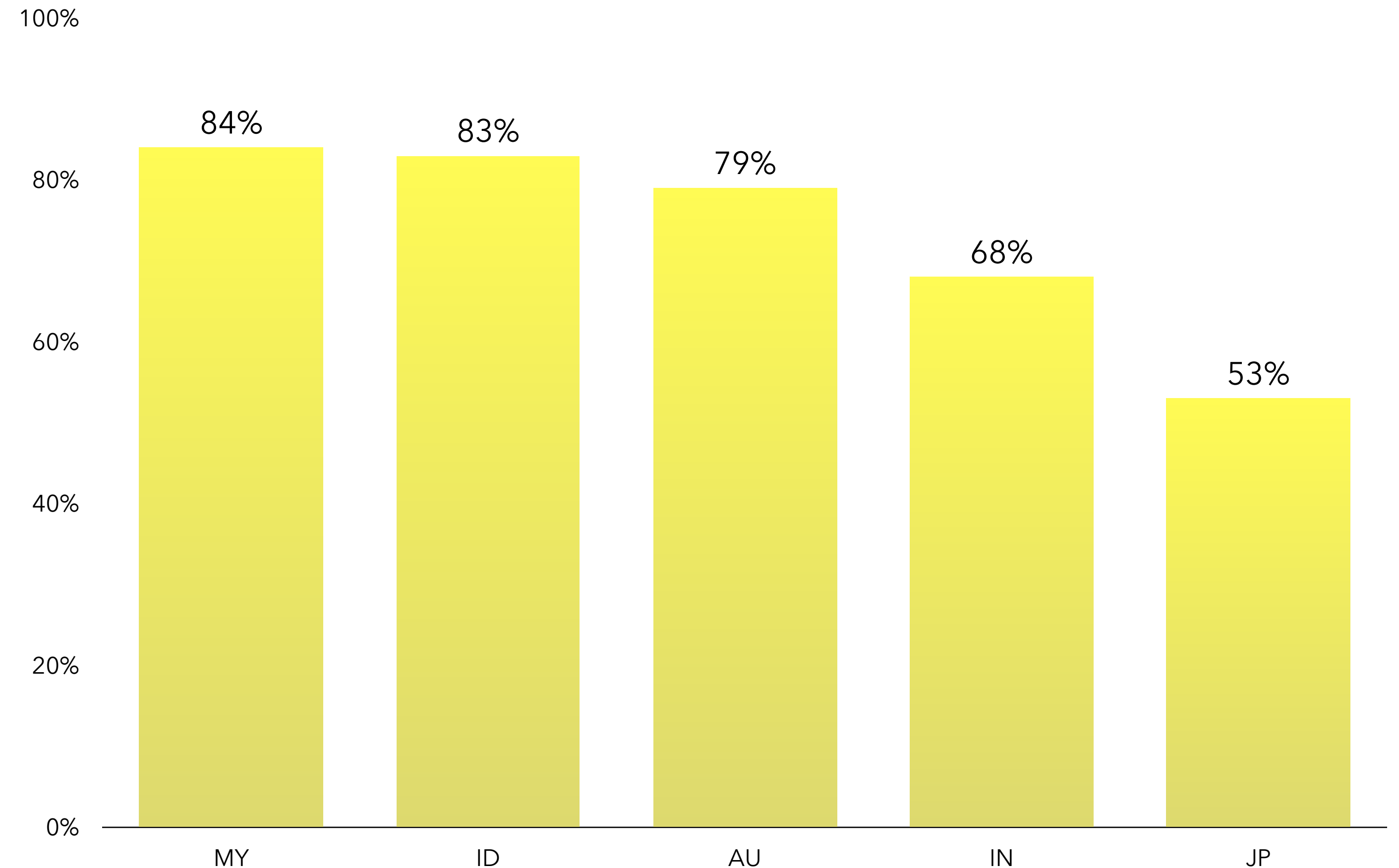
■ Snapchat Generation
■ Older Generations



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



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 154% more likely to prefer to communicate with pictures over words than non-Snapchatters

TOP 5 ITEMS USED IN DIGITAL COMMUNICATIONS	
#1	Photos (78%)
#2	Emojis/emoticons (75%)
#3	Videos/video messages (59%)
#4	Video calling (58%)
#5	Stickers (57%)

2021 Global Cassandra Study commissioned by Snap Inc. | Base: Total N=8,202 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.

Visual communication varies by market

TOP 3 FOR EACH MARKET			
Malaysia	 Emojis	 Photos	 Video Calling
Indonesia	 Emojis	 Photos	 Video Calling
Australia	 Photos	 Emojis	 Video Calling
India	 Emojis	HA HA Memes	 Photos
Japan	 Photos	 Emojis	 Video Calling



03

How do they spend?

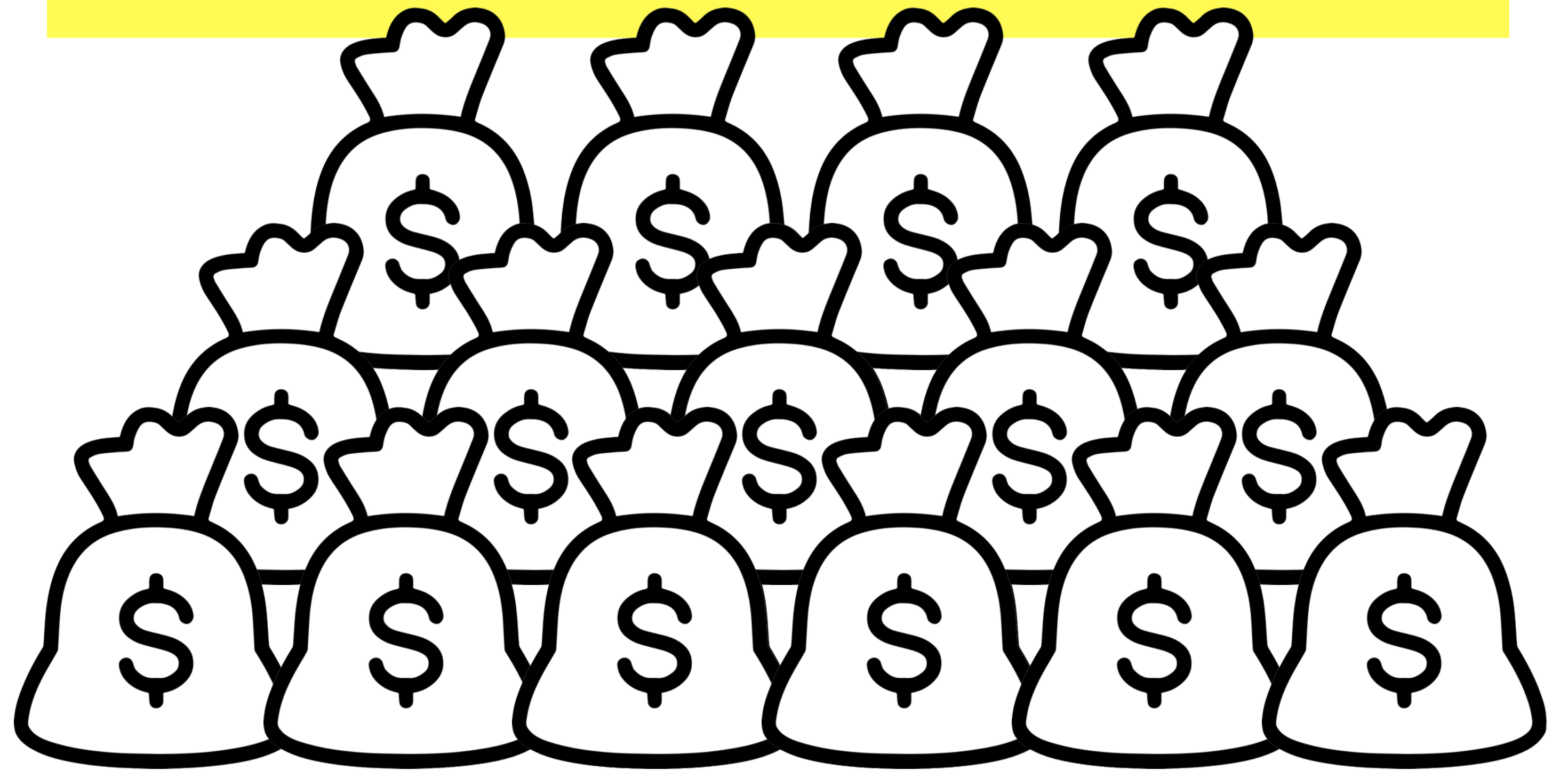
Let's Get Spending

Discretionary spending power for the Snapchat Generation reaches a whopping \$4.4 trillion worldwide - 16% of that in the five markets of Australia, India, Indonesia, Malaysia and Japan.

By country:

MY: 60 Billion Ringgit
ID: Quadrillion Rupiah
AU: 95 Billion AUD
IN: 32 Trillion Rupee
JP: 3 Trillion Yen

\$708 Million



2021 Global Cassandra Study commissioned by Snap Inc. | Base: Those with a monthly income N=4,663 respondents. Cumulative total of average by market. Sample sizes in each market: India = 1614; Indonesia = 1035; Malaysia = 761; Japan = 446; Australia=807.
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 has a highly entrepreneurial spirit and already strives for financial independence

2 in 3

say they want to be self-employed vs. 51% for older generations

9 in 10

say it is important to be financially independent

"I'd like to build my career as an entrepreneur especially in fashion or food & beverage industry"
–Claudia, 19, Indonesia

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

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

- Say I feel like I am a part of others' lives via their stories on social, communication, and/or camera apps (+23)
- Say I like to have clothes and accessories that have brand logos on them (+19)
- Agree that having brand name products makes me feel like I fit in (+18)
- Agree that wearing brand logos helps me show my personal identity (+18)
- Say it is important to me to have brand name items (+17)



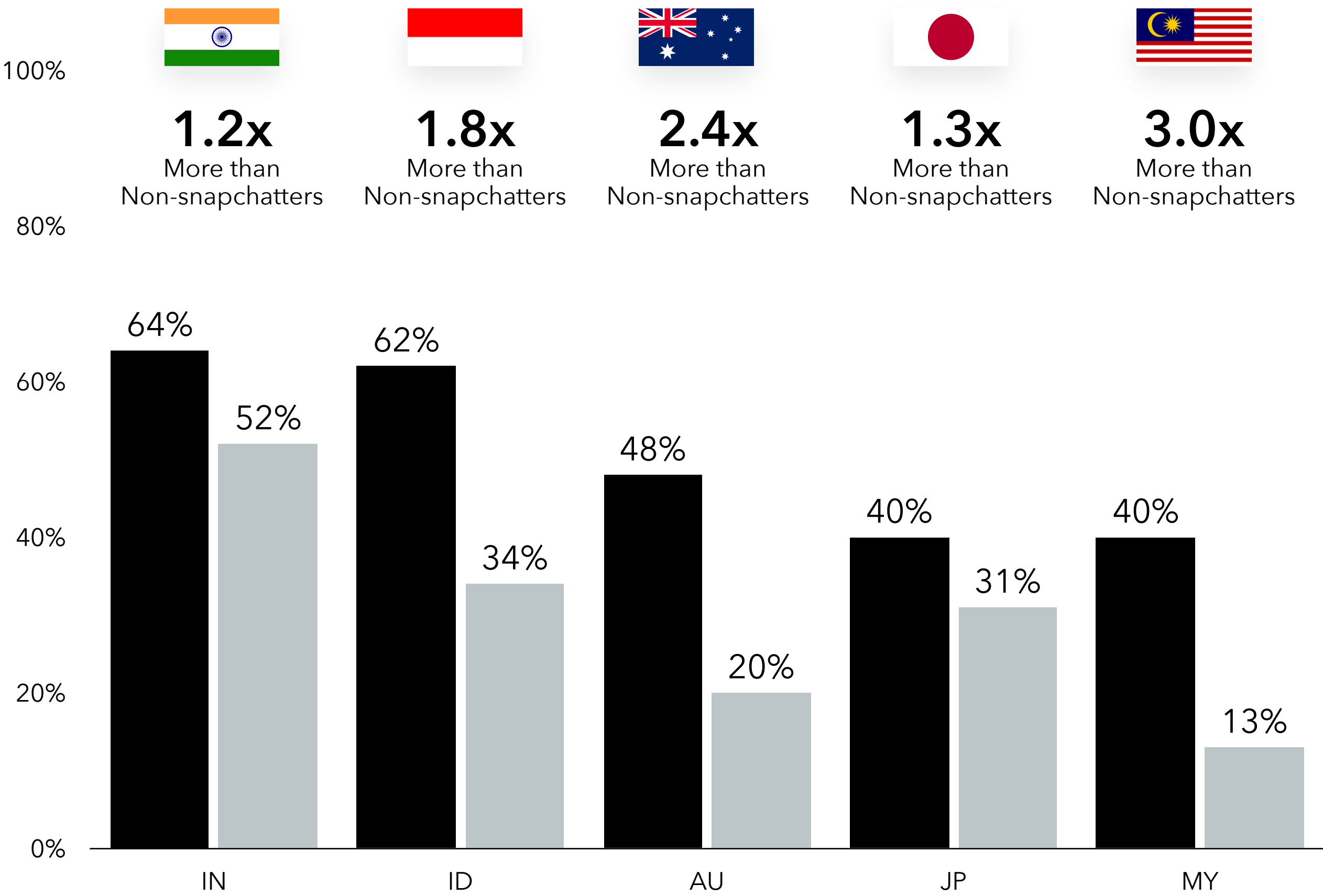


Logos, logos, logos

Across the region, the Snapchat Generation is more likely to prefer clothes and accessories that have brand logos on them.

- Snapchat Generation
- Non-Snapchatters

Prefers Brand Logos



Global interest applies to brands in the region

Foreign brands hold a particular appeal in Malaysia, Australia and India. Compared to non-Snapchatters, Malaysians are 1.3x, Australians 2.3x and Indian 1.4x more likely to agree that they would rather have products from a foreign country.

Prefers Products From a Foreign Country



2.3x



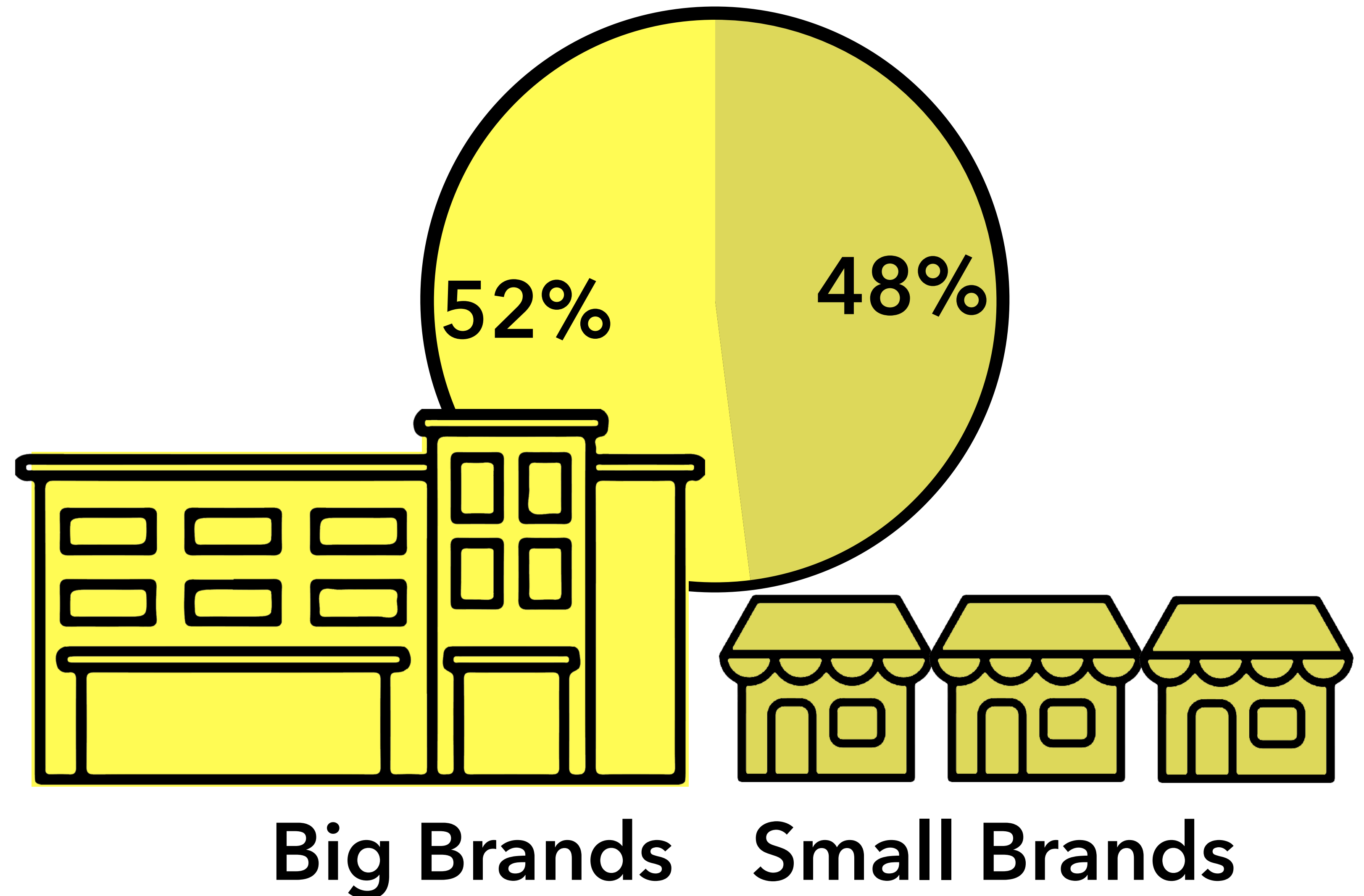
1.4x



1.3x

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 in APAC is 3x more likely to use AR to try on products more than they did one year ago.

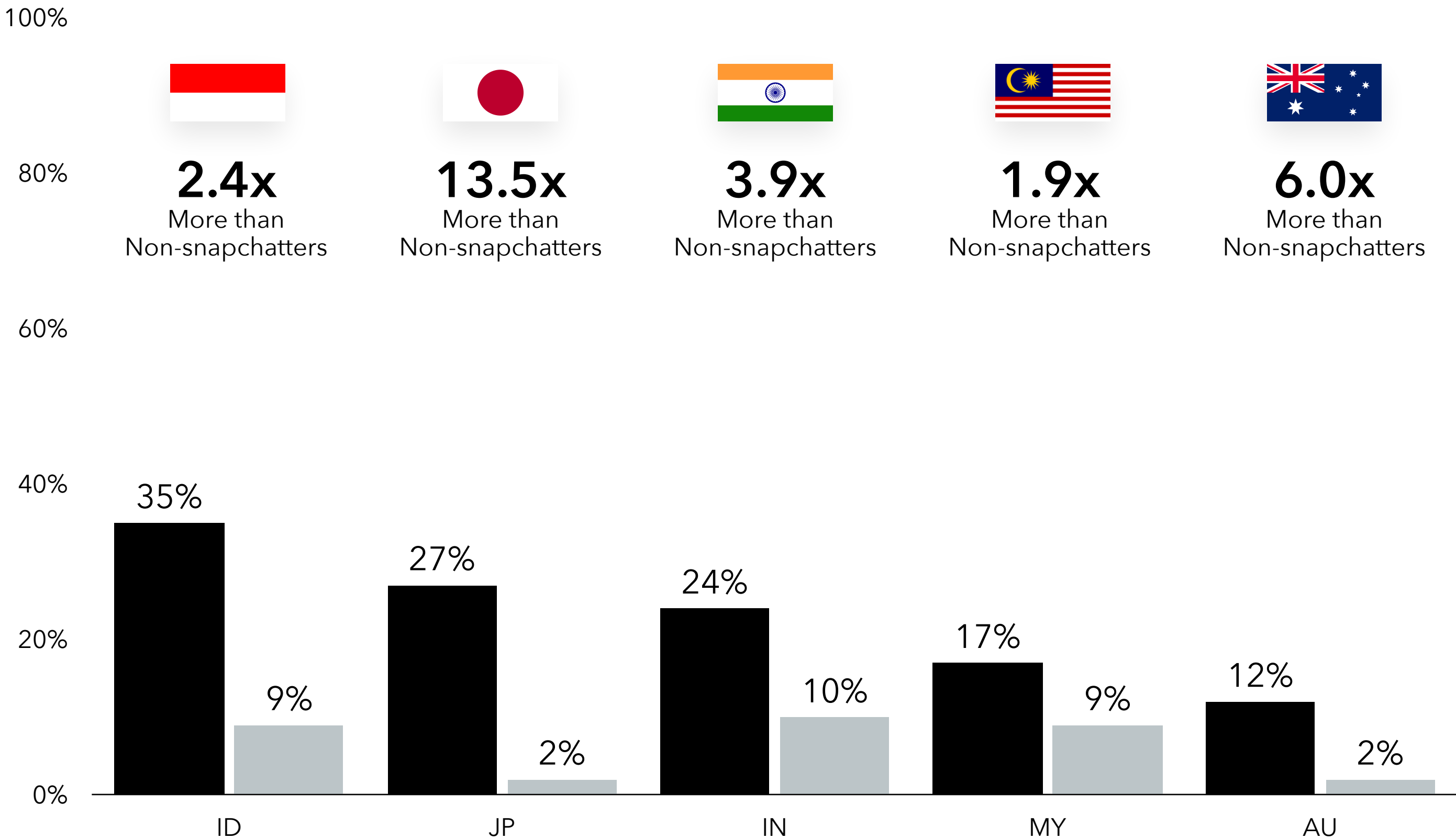


Look to this region to see emerging trends in AR

Across the region, The Snapchat Generation is much more likely to use AR to try on products more than they did one year ago.

- Snapchat Generation
- Non-Snapchatters

Use AR To Try On Products

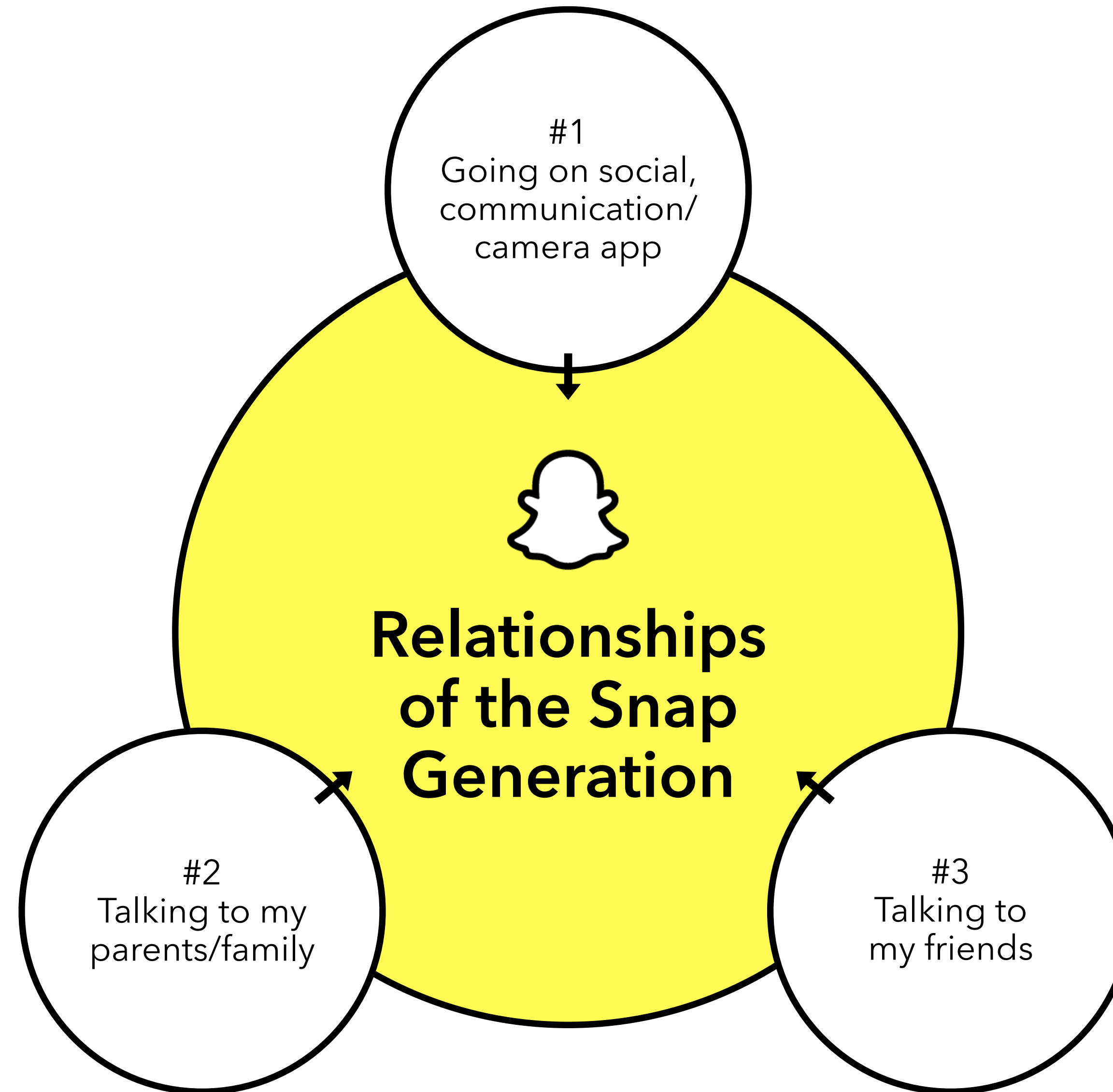




04

**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.”

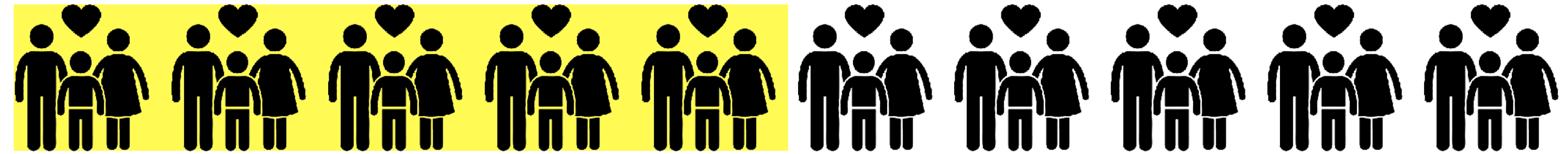
I realized how my life was not as fun or as happy without my friends. This summer, I got to travel with my friends and it was overwhelming how much I appreciated getting to see them.”
—Hina, a member of the Snapchat Generation, age 21, Japan

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



A stronger appreciation of family in the future?

Implications for the future: Happening during their formative years, a renewed appreciation and focus on friends, family and relationships will likely carry forward and become a new, defining characteristic for this generation



5 out of 10 in the Snapchat Generation say they have gotten closer to their families during the pandemic

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.

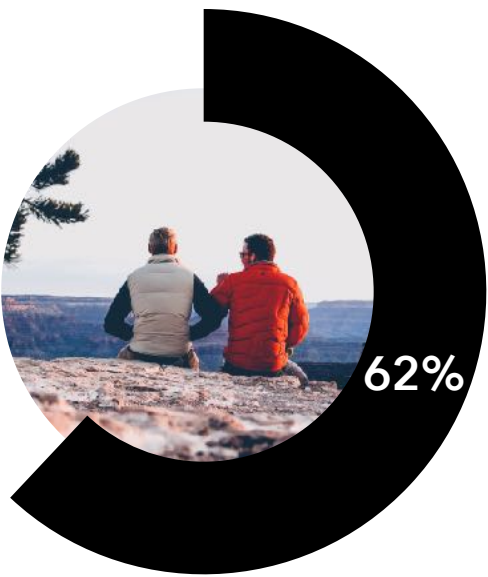
Factors of Career Success As Defined by the Snapchat Generation



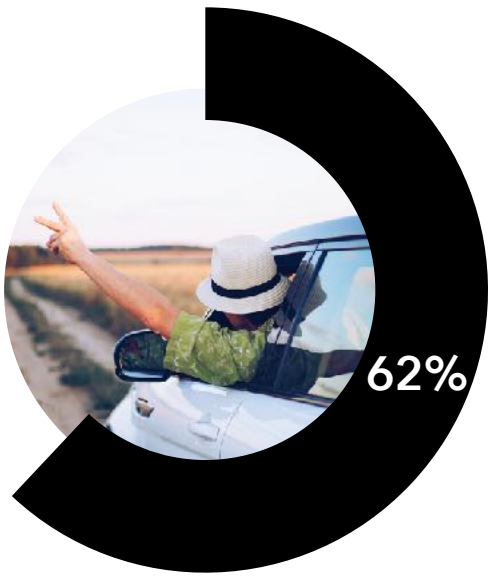
Mentally/
emotionally strong
(vs 59% Older Gens)



Good at working with
different types of people
(vs 61% Older Gens)



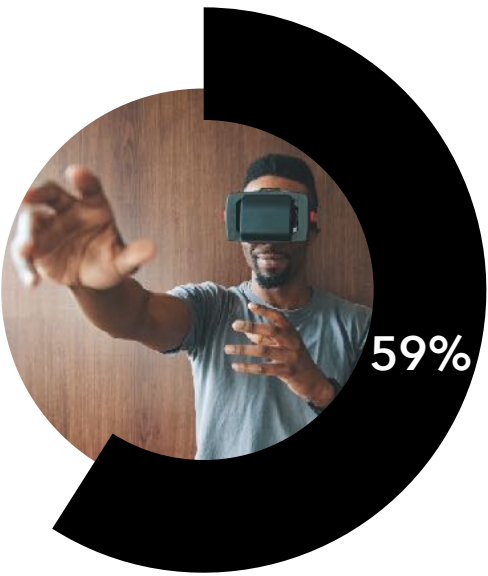
Good listener
(vs 61% Older Gens)



Flexible/ open to change
(vs 61% Older Gens)



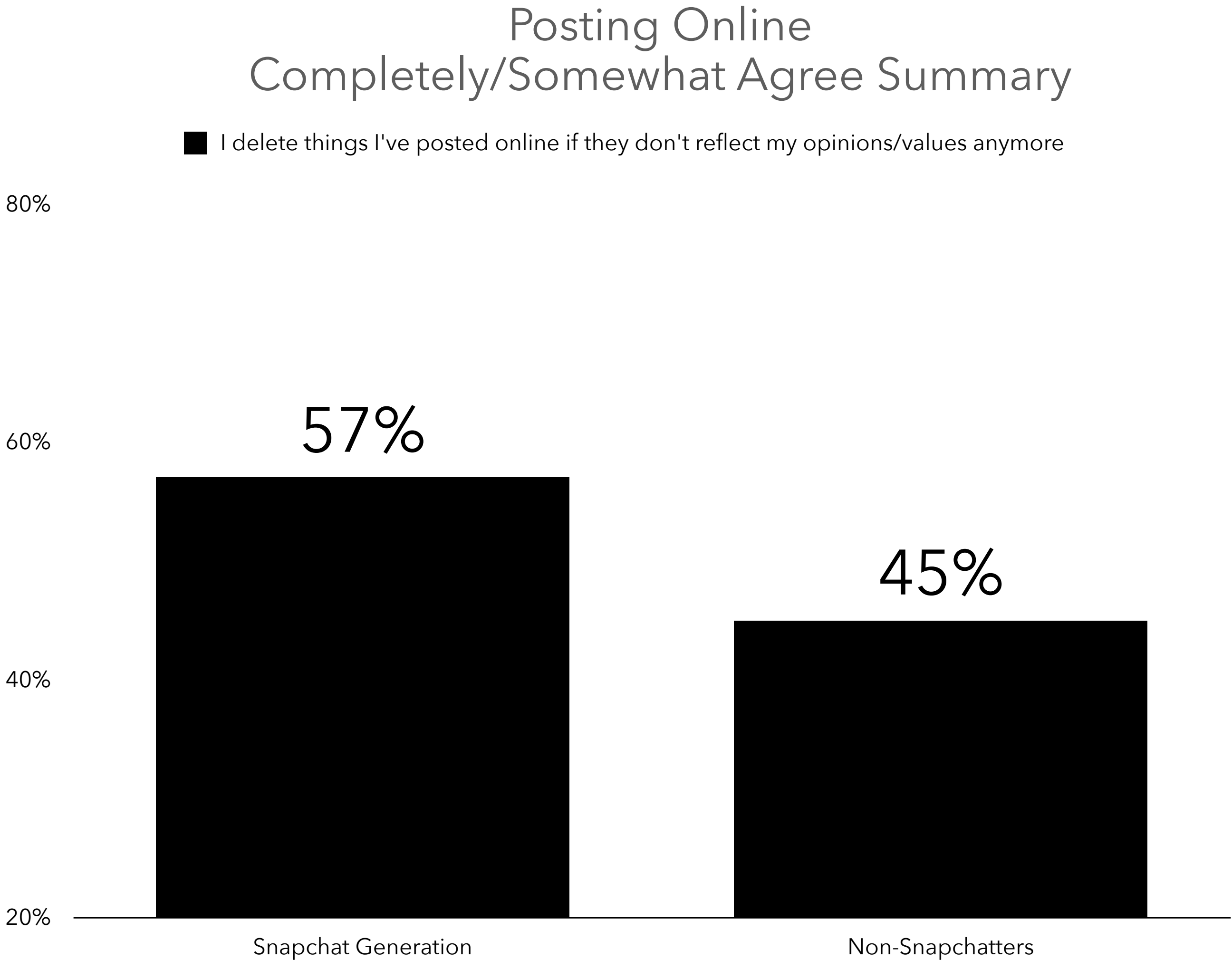
Good at speaking/ writing
(vs 53% Older Gens)



Knowing how to use
latest technology
(vs 50% 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?

In APAC, 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.



Making the everyday fun

They have more interests and hobbies that bring them joy than non-Snapchatters. In particular, items related to fashion, grooming and food provide Snapchatters with joy.



8 out of 10

Think cooking & eating is fun

(compared to 7/10 of non-Snapchatters)



7 out of 10

Feel that self-care and grooming are fun

(compared to 1/2 of non-Snapchatters)



7 out of 10

Say dressing up is fun

(compared to 1/2 of non-Snapchatters)

1 in 2 of the Snapchat Generation agree that playing video games is a productive activity

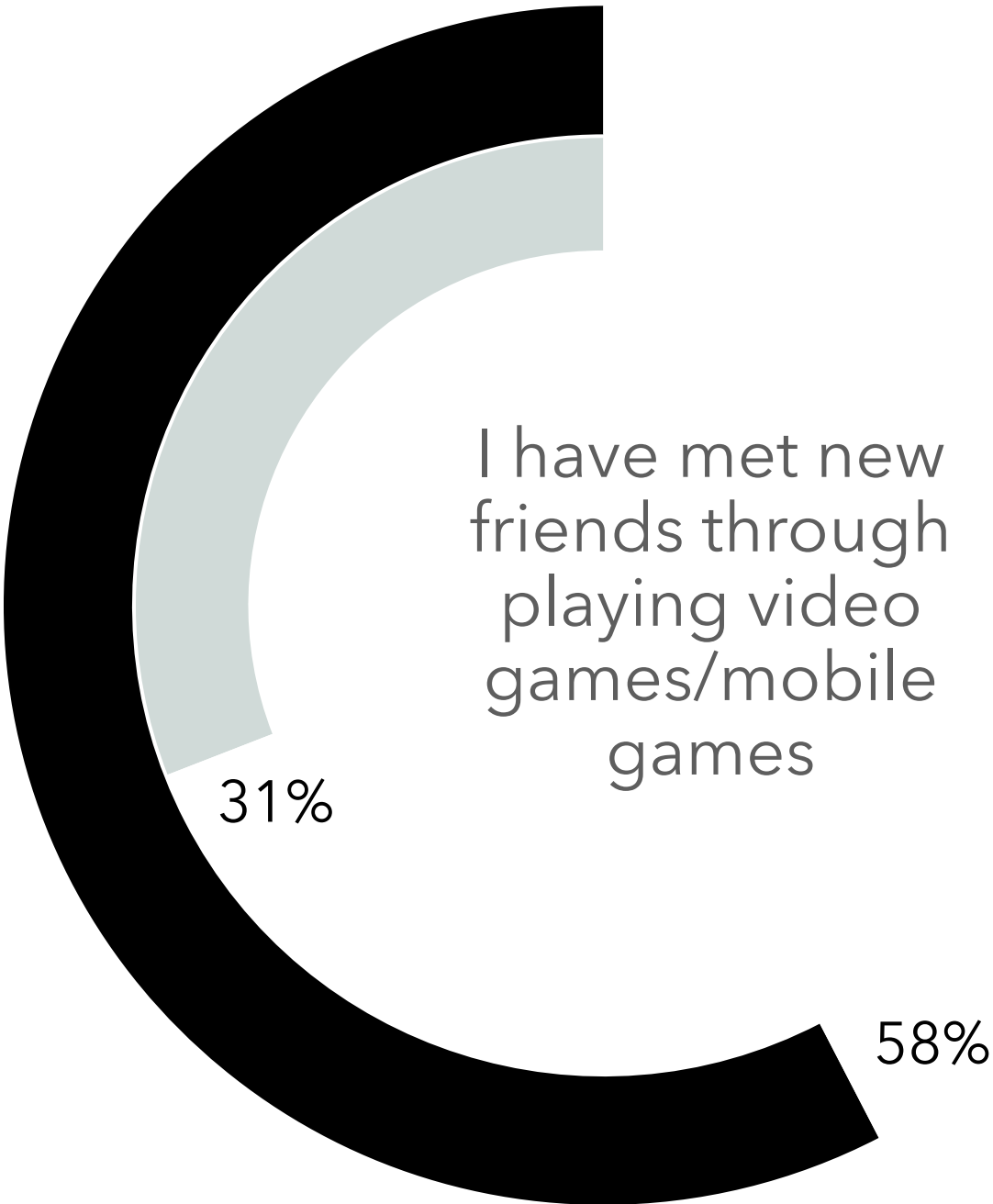
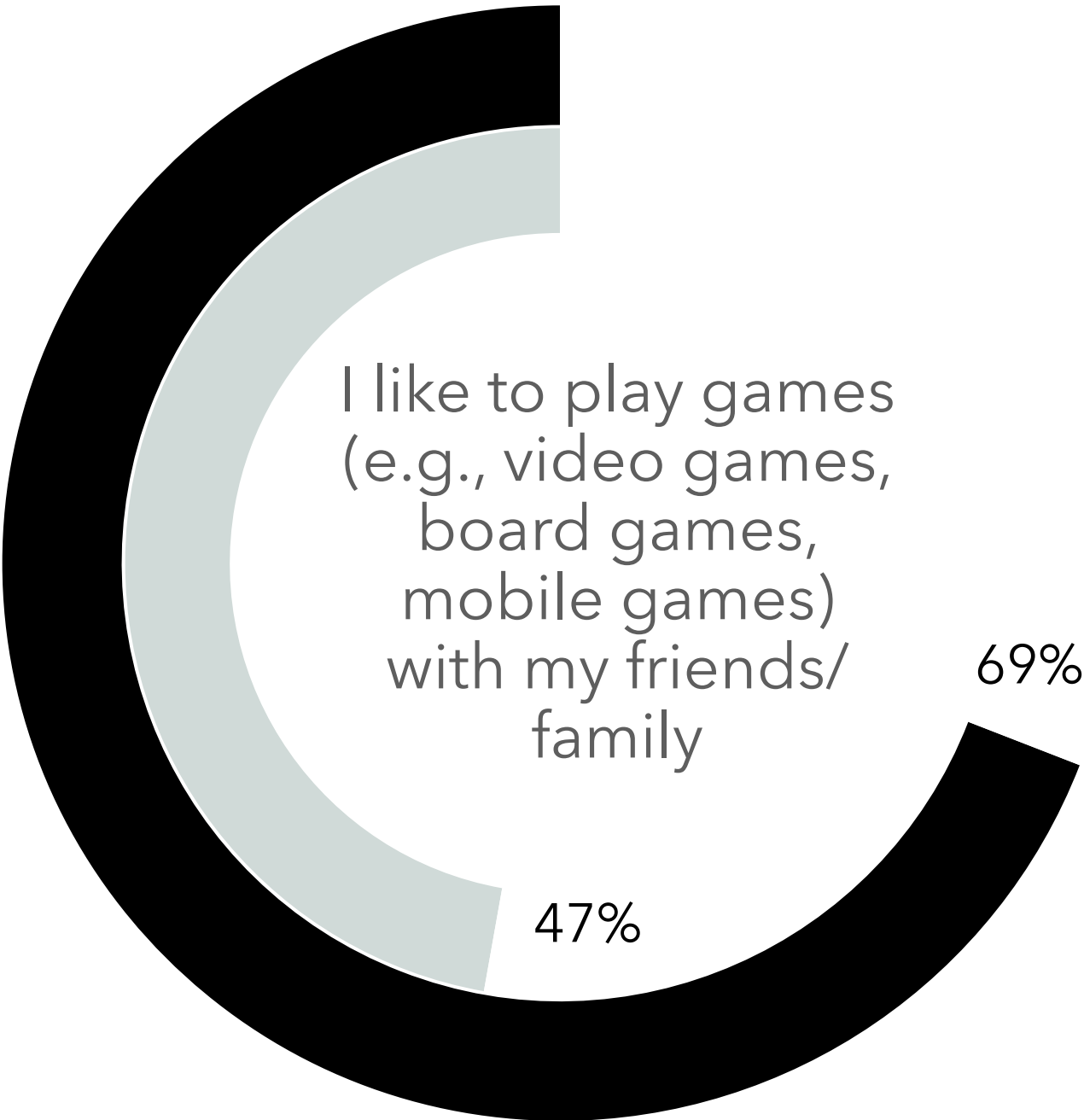
+14 pts from non-Snapchatters



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

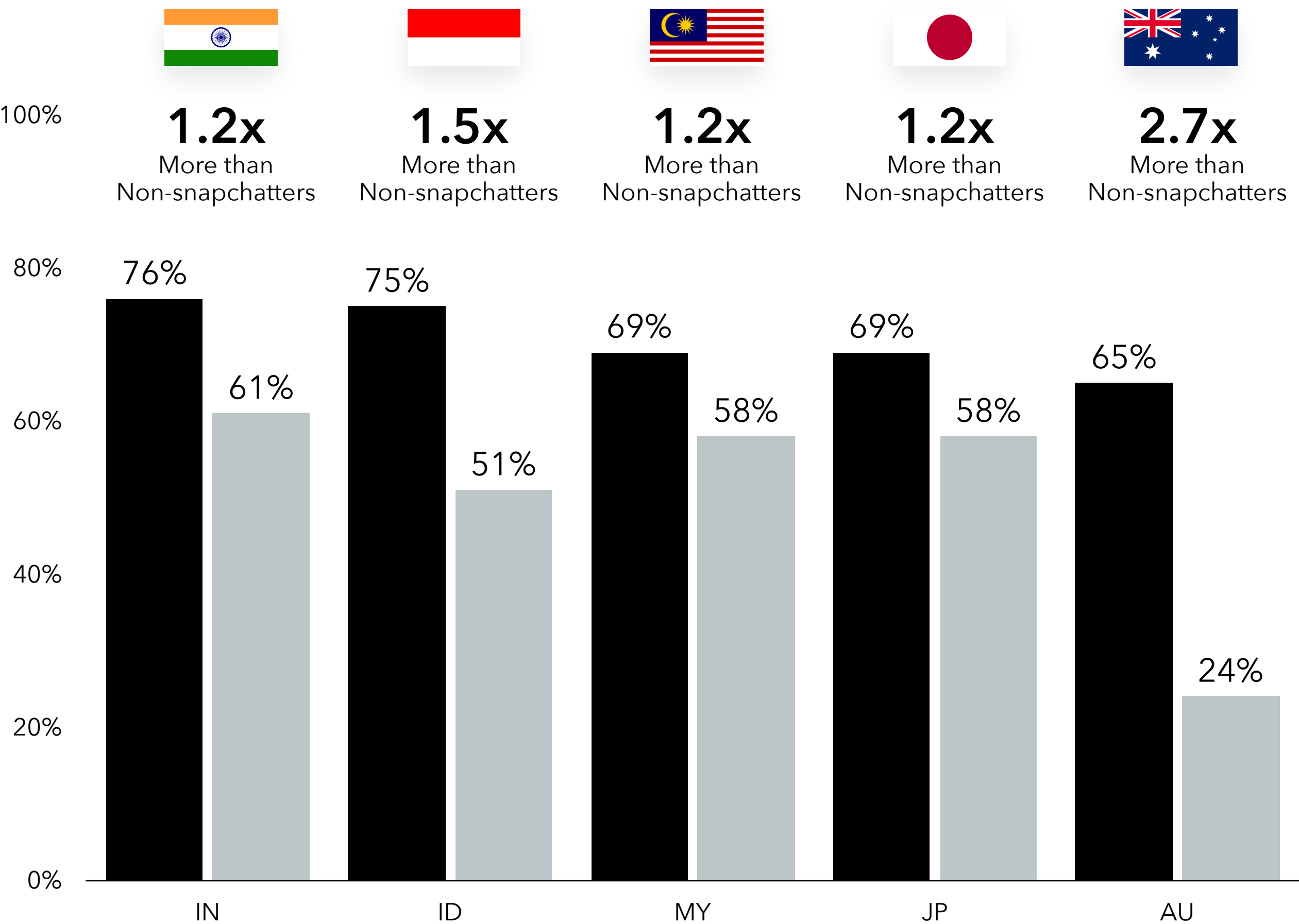




Across APAC,
playing video
games with family
is a favorite activity

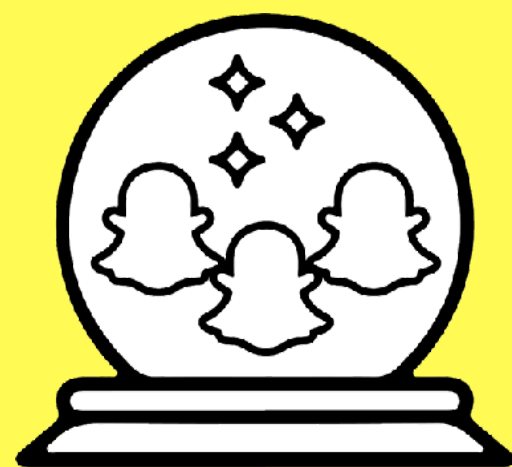
■ Snapchat Generation
■ Non-Snapchatters

Play Video Games With Family



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





The Snapchat Generation is defining the future.

Particularly in APAC, the Snapchat Generation is leading the way in digital connection, empowerment and innovation. With their size and discretionary spend, 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!

