

Know the Gen Z Way!

A Primary Research Report
Conceptualised By
Thinking Hats Consumer Insights



Table of Contents



01

Overview

Introduction to the Cohort and Methodology

02

Social Media

Insights from Social Media Use

03

Online Shopping

Insights from Online shopping

04

Lifestyle Choices

Insights from Food, Travel and Finance

05

OTT Platforms

Insights from OTT Platform use

06

Social Values & Attitudes

Insights from Social Values and Attitudes

07

Future Foresight

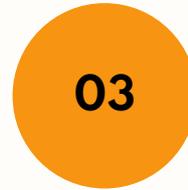
Insights from Social Values and Attitudes



01 Overview



Our Methodology



Background

Conducted Extensive Global Secondary Research on Gen Z across geographies.

Finding Gaps

Identified gaps in existing research and developed a Primary Research plan, addressing the gaps.

Depth Interviews

Conducted Depth Interviews (online) with Gen Z consumers based in Metros and Mini-metros.

Insights

Insights about Gen Z were derived and organised across 7 sections in this report.



Industry View - Who is Gen Z?

▼
▼
▼
▼

“Gen Z is more experimental, advanced, edgy, but they come with a sense of responsibility. They understand that there is a practicality to any and every decision that they make. Now, as an outcome, any brand that tries to speak to this cohort, will have to be edgy and humorous and smart for sure, but then they will have to do it with a lot of sensibility, responsibility and some bit of purposefulness built in their narrative and communication.”

- An expert in the FMCG sector

●

“This generation is able to completely define new ways of doing things, new ways of experiencing and new ways of usage of products. In some ways, this has created a completely new way of how business models are envisioned in the new world. This generation is also activist, they want to do things right, they want to set the tone to make sure the world is a better place. This generation is extremely connected online, they prefer the convenience of online modality to get most of their tasks done.”

- An expert in the Online Delivery sector



02 Social Media



• What social media platforms do Gen Z use?



Why does Gen Z use Social Media?



Entertainment

Most of the respondents cited “time pass” and “boredom” as a reason to use social media.

Consuming memes and animal videos is how they choose to relax.



Stay Connected

“FOMO” or knowing what their friends are up to was another purpose of using social media.



Stay Informed

For many of the respondents, social media is the place they get their news updates and learn more about the world.



Positives & Negatives of Social Media



"It's good to connect with friends"

"It's a very helpful platform for spreading knowledge & awareness"

"You get to learn a lot about what's happening in the world"

"Bloggers se kapdon ke style ki knowledge milti hai"

"It's a very good way to relax after studying"



"Used for spreading fake news"

"It's easy to get hooked on to it, and start using it as a way to get validation"

"Most negativity comes from politics, can cause rifts between friends also"

"Once you start using it, and have friends on it, you get addicted to it and keep checking for messages"



Vloggers and Influencers wield considerable influence

Most of them follow influencers relevant to their interests. This included actors, gamers/ PUBG players, motivational speakers, tech gurus, and fashion & lifestyle bloggers.

Fashion bloggers and motivational speakers were popular choices for the respondents. Vloggers on YouTube were talked about more than influencers on Instagram.

“I usually check out Komal Pandey and Valeria - and they’re both fashion bloggers. I’ll go and check out some floral dresses.” - AJ, Female, 22

However, they are sceptical about sponsored content

Although they follow influencers, they take their content and suggestions with a pinch of salt. They appreciate honesty and transparency in sponsored content.



They ponder upon their trust in sponsored content and question whether they would actually buy the product.

"I don't like seeing sponsored content - If you're being paid for it, then you're going to say good things about it."- AN, Female, 22

Effective Brand Communication Strategies, according to Gen Z

- ▶ Gen Z likes to engage with multimedia: Pictures, videos, interactive IG stories
- ▶ Aesthetic consistency of the brand page is important - Colors and styling
- ▶ They like Ads which align with their interest
- ▶ More likely to follow smaller local brands as compared to bigger names



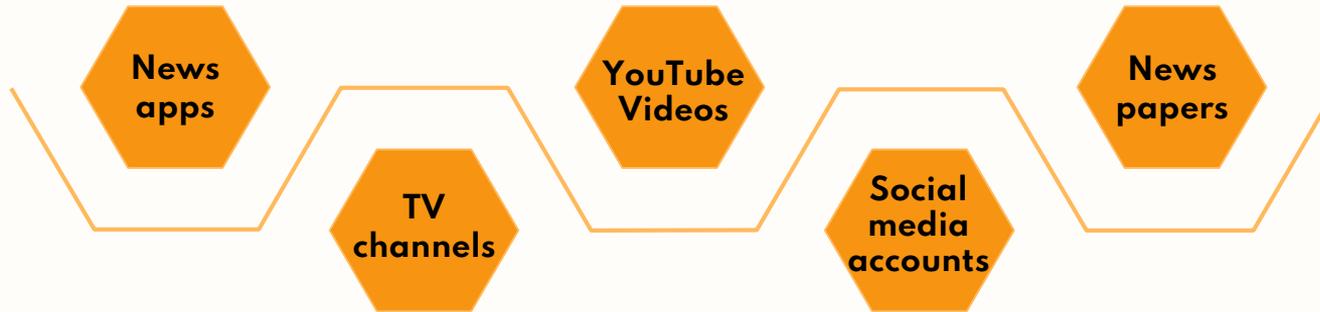
● Fake news vs. Gen Z

They are well aware that the internet and social media are rife with misinformation. Although they take some measures, time constraints and information overload makes verification of all information they read, an impossible task.



They stick to credible sources, avoiding dubious sources like unverified social media accounts, and double check sources shared by others when they have the time or motivation to do so.

“Some articles you need to verify, but waise toh bohot si News aati hai, sab ki authentication main check nai kar sakta.”- VA, Male, 26



Sources they rely on for news





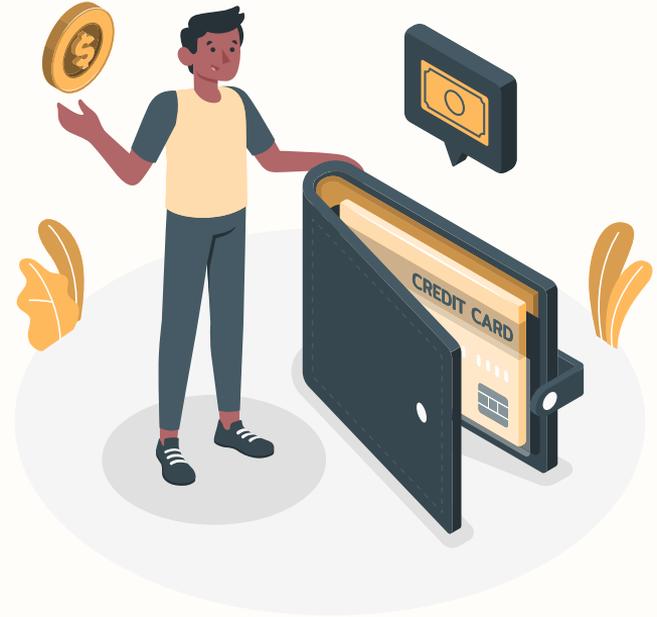
Privacy is a concern, but the threshold of acceptance has increased

They are well aware of how big tech companies use personal data to personalise Ad recommendations, but they don't mind it.

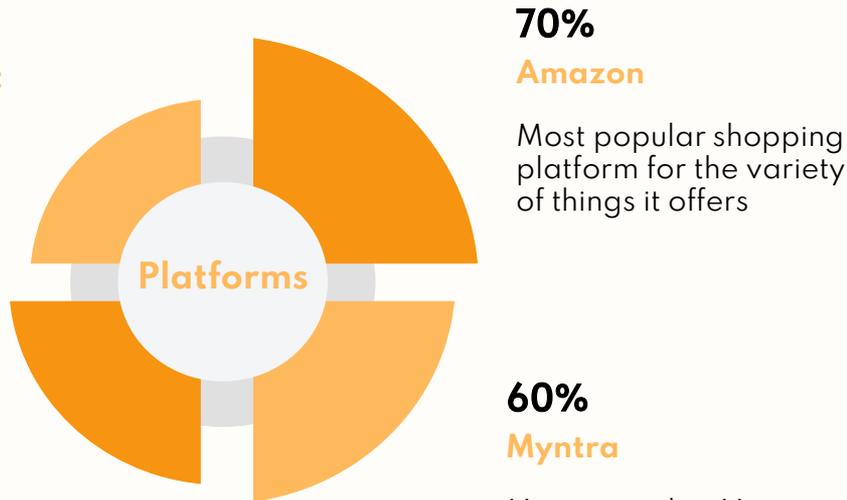
"I am not bothered by data privacy to the extent that I would stop using these apps. We all know how Facebook and all these companies work." - AJ, Female, 22

"I am just a student, I don't have any such data that I need to be worried if something gets hacked. But going forward it will be more concerning." - MN, male, 20

03 Online Shopping



The rise of online shopping



“Festival season mein check kar lete hai offers, kuch achha lage toh buy kar lete hai.”

“Sometimes it starts with just surfing for time pass & ends up with actually shopping.”

“Once in a while I’ll just go on Myntra and spend like an hour doing window shopping, I wish list products which get my attention.”



In-store shopping still reigns supreme

Despite the rising prevalence of online options, the go-to modality of shopping for most Gen Z individuals is in-store shopping, and the reasons cited include sizing issues and difference in product quality.

“When it comes to clothes, I prefer in-store shopping, I can feel the fabric of it, try it in that instant.” - AN, Female, 22

Local businesses vs. Big corporates

There is no clear winner in this comparison as Gen Z appreciates the different benefits that each provides, whether it be the assistance, personalization and accommodation of smaller businesses or the dependability and discounts of big corporates.

Smaller local businesses are preferred in terms of uniqueness of items, but larger corporates were known to be more reliable in terms of payments and returns.

“When I shop from a big brand online, I feel more secure of product delivery without delays. I think this assurance is not there in smaller businesses, But some of the unique & personized things which the small businesses create make you want to buy from them as well.” - KA, Female, 22



What does Luxury mean to Gen Z



“Luxury is a relative term. Something that might be a luxury for me, might be a necessity and vice versa. For me Gucci is a luxury brand, it’s very nice to look at their products, but I don’t feel the need to buy it.” - TK, female, 23

Social and ethical responsibility is high

In an ideal world, ethical consumption would be easy. But that’s hardly the case, and Gen Z tries to do their best to strike a balance

Most recognised the need to be consuming products in an ethical manner (E.g.: avoiding buying from companies who mistreat their employees or pay minimal wages), but at the same time – they are acutely aware of their own limits with respect to their motivation and ability to spend: ▲
▲
▲
▲

“I would love to be the kind of person who cares and does a lot. For instance I don’t buy leather products. I try to be mindful unless it causes me some inconvenience.” - KA, female, 23

*“Main chahta hu sahi companies ko support karu par har company ke barein mein research karna mushkil hojaega.”
- VA, male, 26*





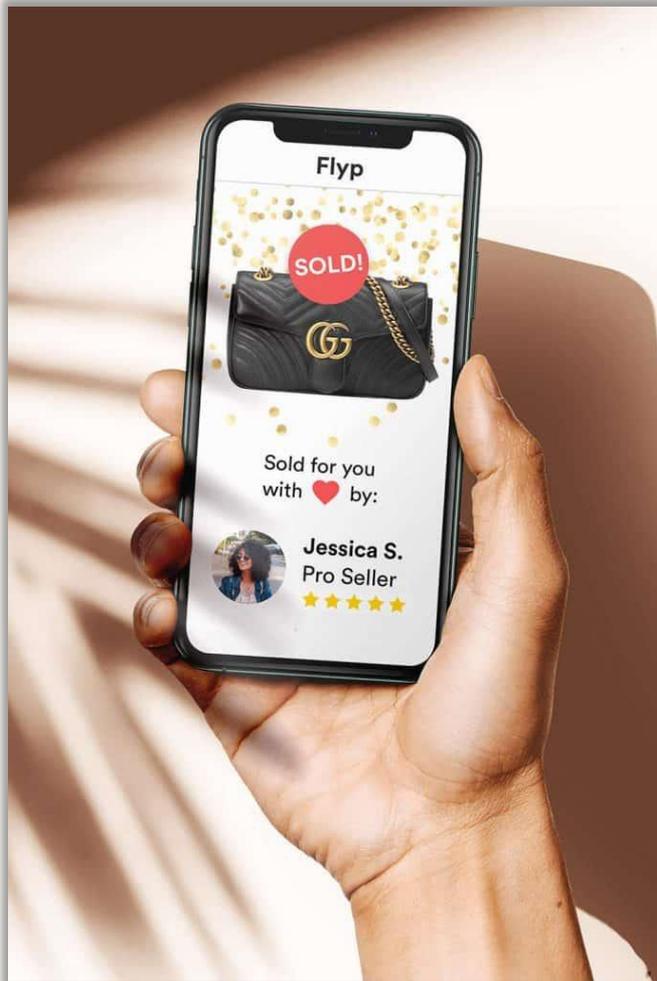
Gen Z is curious but sceptical about niche products

Niche products like organic shampoos and skincare are the new buzzwords, but Gen Z is still deciding, as factors like high cost inhibit them from buying these products.

When asked about their proclivity towards niche products, respondents mentioned factors like comfort with existing brands, lack of credible reviews from people they know, and increased costs as factors stopping them from investing in such products.

“Aajkal bahot he naye organic products aarahe hain, but jo oil mein use karta aaya hu saalon se woh mein jyada paise deke change nahi karna chahta - VA, Male, 24





Thrifting will take time to catch on

Although the practice is on the rise, it is still relatively unknown in smaller cities. The benefits cited by regular thrifters' include affordable prices and uniqueness of items. For others, wearing used clothes, and selling rather than donating these clothes, act as deterrents.

Some respondents had tried thrifting and continue to do it, due to their positive experiences. For others, who hadn't heard of the idea, it was met with a little resistance.

"My experience has been great with thrift -they tell you if there's a defect in your product, and it's pretty affordable, and delivery is also on time." - AN, Female, 22

"I wouldn't buy from a thrift store, I buy only when I need things, so if I'm buying something once in a while, I'd rather go for something original." - AP, Female, 22



Renting vs. Ownership

Taking into consideration factors like mobility and avoiding hassle, Gen Z is more open to the idea of renting household items like furniture and cars. Ownership is still preferred by those who don't intend to move out.

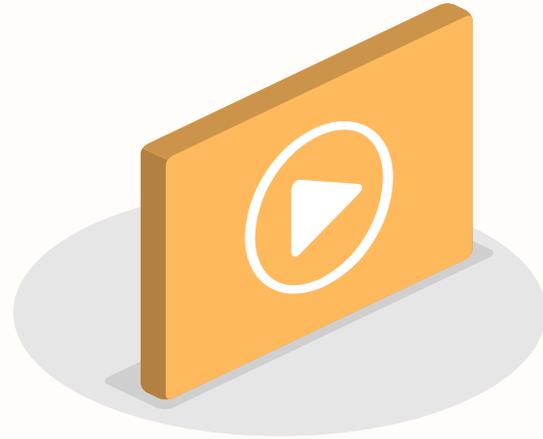
Practical considerations like hassle and cost affected their decisions.

*"I'd rented an AC and a bed. Our experience been mostly positive."
- KA, Female, 23*

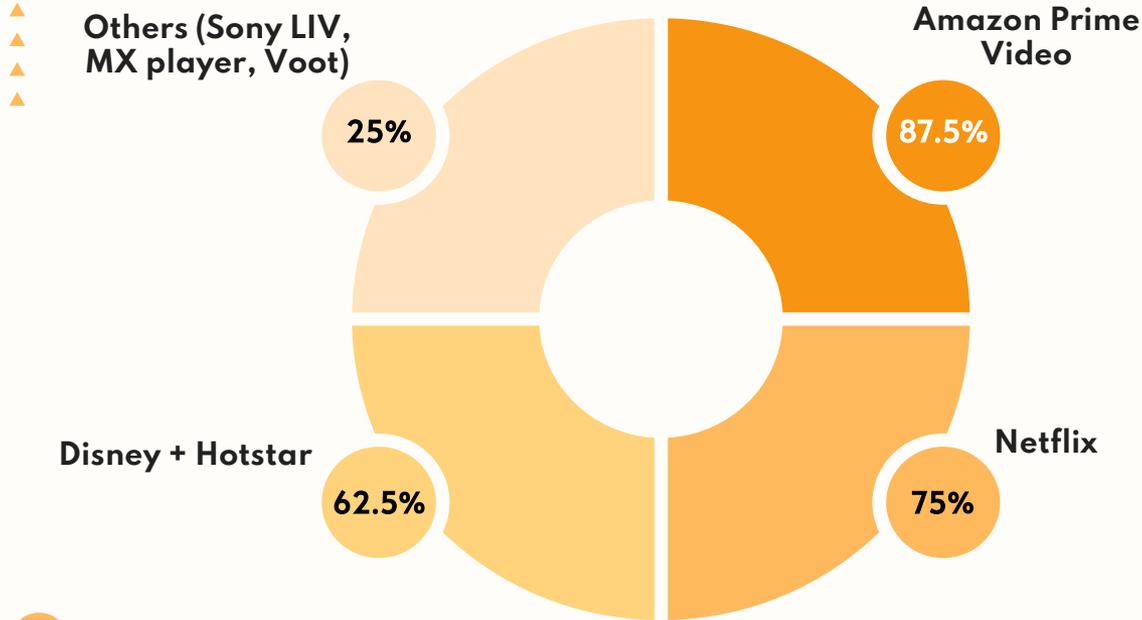
"If I relocate somewhere, I'll definitely rent furniture. I'd be okay with renting cars instead of buying." - AJ, Female, 22

04

OTT Platforms



Which platform is Gen Z binge watching?



*"5-6 episodes toh ek baar
mein dekh lete hai."*

RK, male, 20

*"If it's something I'm really interested in,
then I would binge watch it no matter
what I have planned for the day."*

AN, female, 22

*"I binge watch, because I forget
the story otherwise."*

VA, male, 26

How does Gen Z decide on what to watch?



"I like to experiment. I first see the IMDB rating. If I'm still confused, I'll randomly start watching something. If the story is good, I'll continue watching it." - VA, male, 26

"See the reviews, which one people say is better, or the story - which is the story I'm particularly intrigued by." - AN, female, 22

"Sometimes, some shows or movies just blow up, everybody's talking about them, so I watch those that are trending." - AJ, female, 22

"I used to get so overwhelmed that I used to watch what I've already watched, now I ask my friends - I don't spend time thinking about what should I watch." - KA, female, 23



Team 'Made in India'

Gen Z is appreciating the quality and uniqueness of Indian content in comparison to their western counterparts.

Talking about OTT content and the changes that came along with these platforms, respondents expressed a sense of contentment and pride, and a hint of surprise at the quality of shows being produced in India.

"I like the Indian content on OTT platforms. The content is getting on the level of international content. There are good stories, better representation of characters and they are not unnecessarily censored or dragged to gain TRP." - AN, female, 22

Gen Z prefers talent over star power

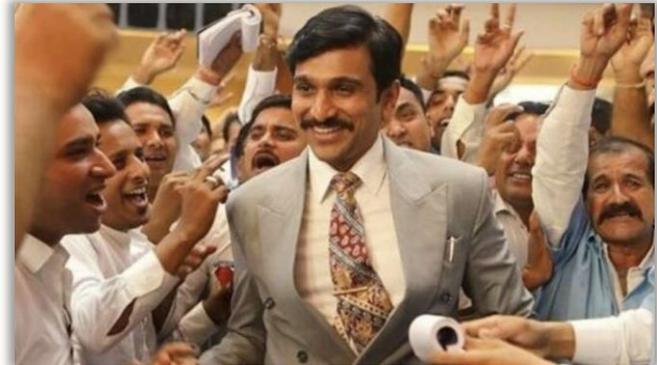
Gen Z is in favour of flipping the status quo. They are tired of seeing the same old faces in all the movies and shows, and appreciate newer talent and greater representation.



While talking about what they like about OTT content, some respondents mentioned the fact that these platforms provide opportunities to newer actors and it's not dominated by known Bollywood celebrities.

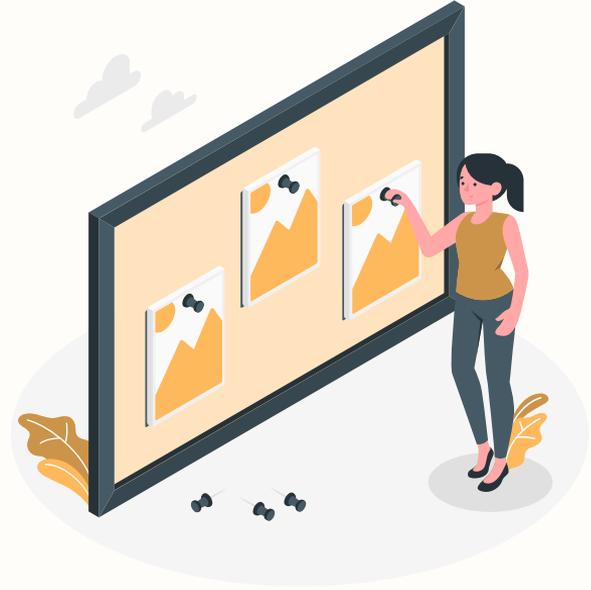
"Scam 1992 became so popular and the actor received so much recognition for it." - VA, Male, 26

"I don't think we were getting shows like Paatal Lok and stuff before, there's more genres to watch than 5 years ago." - AJ, Female, 22



05

Lifestyle Choices





Freshly prepared is the way to go

Caught in a flux between modern convenience and traditional practices, Gen Z expresses some hesitation in routinely buying frozen food.

When it comes to buying frozen food some appreciated the convenience, while some chose to avoid them all together.

“I will buy what is made in front of me. I won't buy frozen food.” - MJ, Male, 20

“If I start living alone, I may buy some frozen food as it will be convenient.” - AN, Female, 22



Alternative diets are yet to catch on

Few claimed to have heard of keto, vegan and gluten-free diets, and few had actually tried a keto diet.

Interestingly, none of them indicated any willingness to try such diets any time soon.

“I am aware of them because internet is flooded with info about these diets, because of the body positivity movement etc. I don't feel the need to try these as we cook healthy food at home.” - TK, Female, 23

Melting Pot of Influences

With increasingly permeating cafe culture, easy availability of imported foods and increasingly international menus – food is no longer bound by geographical boundaries.



The influence of international cuisines for experimenting to 'Instagram-able' interiors.

"It's pretty cool, you can try different things such as Korean noodles which wasn't there few years back."
- TK, female, 23

"Ab sab hotels mein log bahar ki cuisine zyada daalte hai, chinese food aur fast food har menu mein hota he hai."
- RK, male, 20

"The décor of places is prettier now, its good to see restaurants are trying to make their interiors Instagram-able."
- KA, female, 23



“To be honest, the segment Gen Z, they are typically more prone to buying more restaurant food. When we say food delivery, I’m alluding to that. They prefer doing that a lot more, it comes at a great convenience, it’s online, right? It’s the growth of companies like Swiggy and Zomato which are having a huge space. If you look at their segment, their demographics, it’s made of, driven by Gen Z customers.”

Expert in the online grocery delivery space



The rise of online food delivery

How does Gen Z choose a restaurant?

The cost, distance from my place & cuisine

KA, female, 23

The ambience, reviews, cuisine & affordability

AN, female, 22

Quality, reputation & hygiene, I don't trust reviews

AP, female, 21

Have I tried it before and have I liked it?

TK, female, 22





Preferred mode of payment: Digital

Gen Z embraces technology and has switched over to digital modes of payment as opposed to spending cash.

A clear trend towards digital modes of payment (online payment portals, card payments) emerged with strong inclination towards UPI platforms. Cash was kept handy only to make very small size ticket purchases.

“For transactions, I only prefer Google Pay or Phone pe. 90% of my transactions are done online. I hardly carry cash.” - VA, Male, 23

“I used to use cash earlier, have been using UPI for the last 1.5 years, have been using that more frequently.” - RK, male, 20



How does Gen Z like to travel?

They like to travel with friends

They like to customise their travel

They wish to make all travel arrangements by themselves rather than booking the trip through some agent

Technology has improved travel experience

The internet and apps like google maps have made travel much more accessible and convenient, and bloggers have made unknown destinations popular.



06

Social Attitudes and Values



Canceling cancel culture



While ‘cancel culture’ as a phenomenon had gained popularity over the last few years, recent trends of ‘cancelling’ people or events for old tweets has led to the devolution of the term for Gen Z.

Mostly the overuse and deliberate ruse of digging into someone's past in order to cancel them presently, are reasons for these strong opinions. However, it is also seen as a way to hold celebrities accountable for their present words or actions,

“It’s getting out of hand now, people are literally digging into people’s past tweets, I think that’s very unnecessary.”

- AN, female, 22

“In some ways, it has made celebrities and influencers more accountable. They’re now being held accountable.”- TK, female, 23

Role models have evolved

"People love Virat Kohli for the way he turns around things for himself by being disciplined, the way he balances his personal life. Things like those clicks these days with Gen Z instead of looks.

There has been a **whole shift towards influencers**. Influencers are seen as more authentic, compared to big celebrities names. That is a big trend that is coming in."

Expert in the
FMCG space



Gen Z is aware that nobody is truly perfect. They don't think that any one person can embody all desirable values –in fact they like to see the grey shades or flaws in character. It makes them more human and relatable'.

Some chose Shah Rukh Khan for his style and motivational speeches, and some chose family members and business tycoons as their role models.

"My father is my role model. One trait that I learnt from him is honesty. I want to be like him in that aspect." - AP, female, 22

"There are different aspects of different people that I like, I haven't found anyone to be perfect." - TK, female, 23

● Gen Z upholds the values of a democracy

- **Protests and agitations have become a ubiquitous sight across the world as concerned citizens take to the streets to express their discontentment with their governments. This generation recognises the importance of protests as a form of dissent and actively participates and propagates this culture.**



“I think currently there’s a lot of repression against people being democratic in a democratic country, which is terrible.” - KA, female, 23

“If things are bad, then one should protest. One should think and protest. We’ve read news where people were protesting but didn’t know what the protest was about.” - VA, male, 26



● How much trust does Gen Z have in big corporations?

Gen Z expects corporates to find sustainable ways to do business

▲
▲
▲
▲
“These large corporations, they’re only making services more efficient for us. But are they taking things like climate change, rights of people into account? I understand their aim is to maximise profit, but they should do that sustainably.”

- AN, female, 22



“I’m not very supportive of this government, I have very little hope from this govt. I don’t think the govt has a vision, they just do whatever comes to their mind, and it’s very unpredictable.” - AN, female, 22

“I have a lot of faith in the concept of a govt, I am a democratic socialist, I do believe that we need the govt very much, we need them to regulate our economy but the current govt, I don’t trust them a lot, they lie quite a lot.” - TK, female, 23

Trust in Governance

Gen Z is accepting of different sexual orientations



“Chahе woh koi bhi sexual orientation ka ho, agar wo mujhse acche se baat kare toh main bhi usse acche se baat karunga.”

MN, male, 20

“I would like to have a conversation, I would like to listen to a different point of view.”

AP, female, 22

“I would not be more or less open just on the basis of what their background is like, how different they are from me.”

KA, female, 23



They recognise the importance of mental health

Gen Z is highly involved in the conversation around mental health and its importance, and how to inculcate habits for good mental health.

Gen Z consider mental health important, they don't shy away from taking care of their own mental health. Talking to friends & watching motivational videos is a common coping mechanism for them, ▲▲▲▲

“Yes, mental health zyada important hai, log focus nai karte ispe. Khud main motivational speeches sunta hu, aur doston se baat karta hu.” - RK, male, 20



● Rise of unconventional careers

Gen Z with their pragmatic outlook is increasingly open to career paths that represent the road less taken. This is accompanied by an openness from parents as well.

They advocated for following one's passion, and some of them talked of their own unconventional choices without sticking to society's norms of doctor/ engineer/ CA.

“Family pressure nai hona chahiye bas, jo interest hai wo karna chahiye. Agar stand-up comedian banana chahta hain koi toh usko woh try karna chahiye!” - RK, male, 20



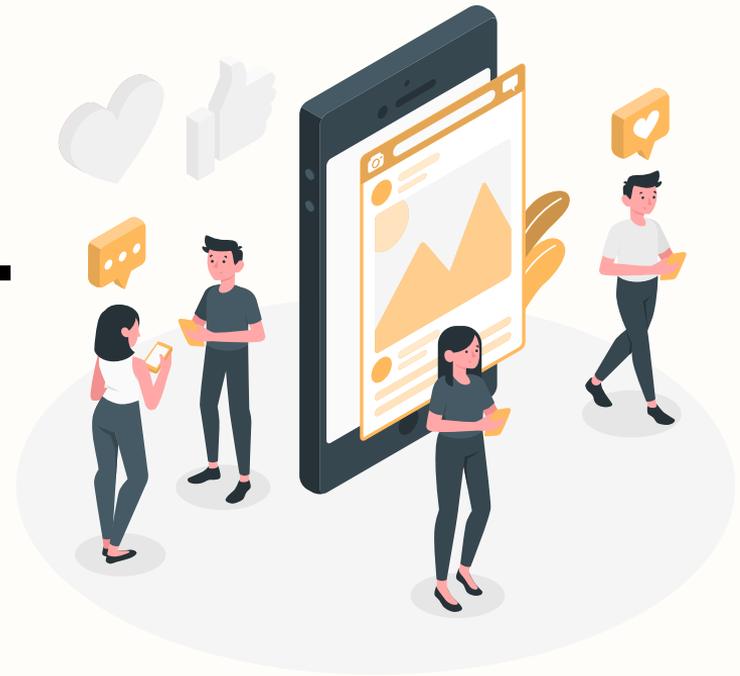
Gen Z is pragmatic about being enterprising

Although Gen Z has a more entrepreneurial bend than previous generations – they are also practical about it: they don't want to be their own boss just for the sake of it.

“If I'm able to achieve that much success to be a boss, then good, but I don't have an issue to work under someone, woh bhi better rehta hai, mujhe business se matlab nahi hai, mujhe salary se matlab hai.” - MN, male, 20



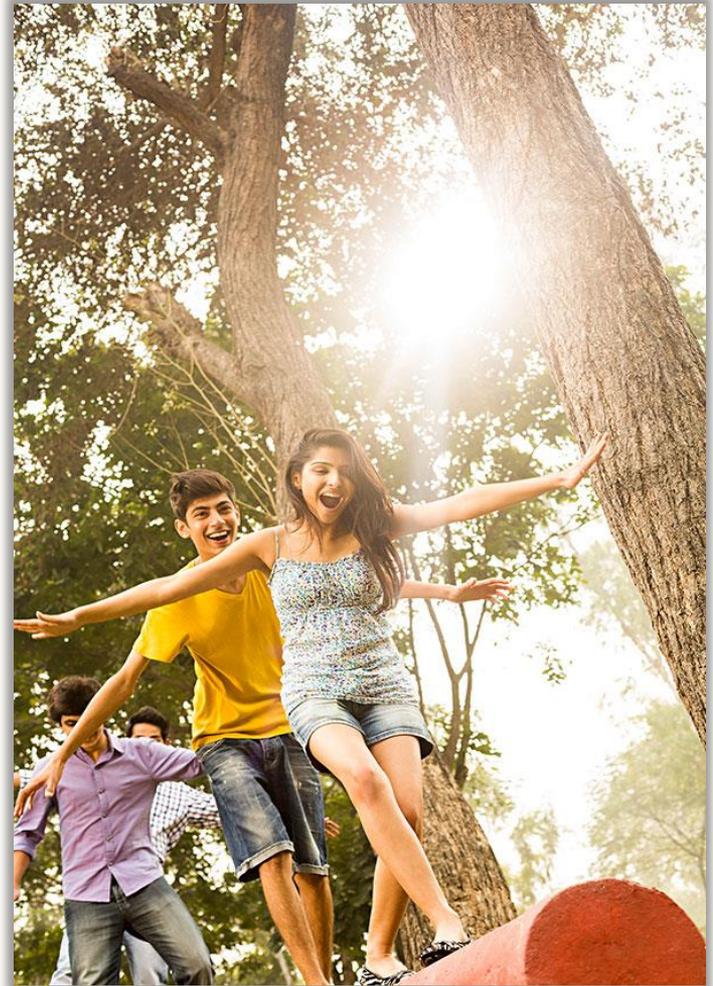
07 Future Foresight



● Future of India and their generation

- ▲ Regarding their future, most Gen Z individuals are hopeful for a better tomorrow. Citing progressive values, greater awareness, capabilities, inclusivity, ability to learn and unlearn, and the sheer force of their will, they believe that their generation will make this country a better place to live in.

However, at the same time they expressed concerns about certain factors like the state of the economy, increased competition, polarised political landscape, increased surveillance by the government and decreasing empathy.



Social Media: Changes and Predictions

What has changed?

“Every establishment knows that this is a very important way to influence people, even the govt - bureaucrats having social media accounts, so it has expanded its reach.” - AN, 7, 22

“On YouTube, 10 years ago, there was only fashion content that most people watched in our age group, but now there’s so much educational content, which is a good thing.” - TK, 7, 23

“We’re not very open to listening to other people’s opinions. I think that is something that social media has done to us. I think I personally have become more politically inclined now.” - AJ, 7, 22

What will change?

“Every time I think about what will happen in the future, I think there would be more invasion of privacy. I think you hear cases all the time of people being hacked - so I think cyber crime would be more.” - AJ, 7, 22

“I would like to think that social media would be more carefully regulated by the government to protect the consumer privacy and interests, specially platforms like Whatsapp in India, because right now they are very tied to conversation, it’s not about just business.” - KA, 7, 23

“There should be a restriction, that children below 15 years should not make an ID, you should ask ID proof. You can’t control what you will see on social media, so there should be restrictions in place.” - MN, M, 20

Online Shopping: Changes and Predictions

What has changed?

- ▲ *"It has become more accessible to a lot more people in a lot more areas. Even if you live in a remote area, or if there was a brand that was not delivering to your location earlier, they're all mostly trying to bridge that." - AJ, 7, 22*

"There wasn't much variety earlier. Positive impact ye hai ki humein kayi cheezein dekhne ko mitti hai, colours aap choose kar sakte ho, kahi apps jaise Lenskart hai jispe aap photo upload karke dekh sakte ho ki chashma konsa accha hai." - VA, M, 26

What will change?

"There should be some mechanism for authentication - like a bar code. There are lots of copies of these things, it's not easy to evaluate whether it's the right thing or a fake." - VA, M, 26

"I think one thing brands need to become more conscious about the packaging of the product. They shouldn't give plastic bags. I hope to see that happen across all brands, that they use something that's recyclable." - TK, 7, 23

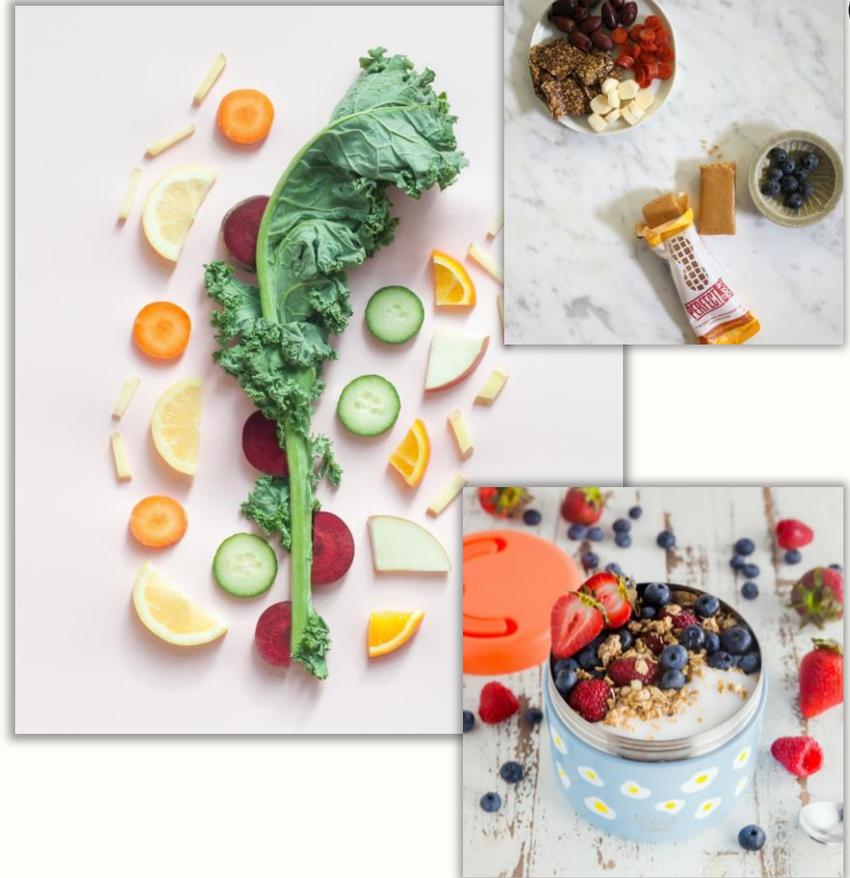
● The rise of health foods

▲
▲
▲
▲
"The health food segment is growing a lot. One of the things about health foods, is that it's slightly on the pricier side than your regular stuff. If you look at that age group of Gen Z, I think they are not earning probably, and they're very price-conscious."

The segment is growing overall, but I don't necessarily say that this base doesn't want health food, Gen Z wants it but because it comes at a price, it's slightly more expensive, they're not able to afford it.

I think they would love to buy health stuff going forward once they start earning."

**Expert in the online
grocery delivery space**



Brands and Narratives

“These days you'll hear a lot of cases of small brands, coming and making it big, because they had a very true narrative. For example, The Man Company, which is about male grooming products became a rage all of a sudden because of the way the man was introduced. It wasn't about “Hey, I'm a babe magnet”. It was about vulnerable men who want to be perfect, and that worked for them. So **it's very important for Gen Z as to what kind of narratives the brands have, what am I really getting associated with? Is it authentic or not, is it true or not? From there, stems out their choices.**”

Expert in the FMCG
sector

Messages for Marketers

“One classic difference between Gen Z and Millennials I'd say - pick up an old Pepsi Ad, which was about style and smartness and coolness and now look at the kind of Ads Pepsi makes. The whole ‘Har wrong ko right bana de’ Ads, it still has the similar attitude but it's much deeper and that's how the brand narrative is changing, while the product is not. **Today, it's a fad almost, to have a purposeful advertisement. I think Gen Z is very discerning that way. They know what they see. They know what to question and they know that what everything they say may not be true. That kind of becomes the key message for any marketer.**”

Expert in the FMCG
sector

A report by Thinking Hats Consumer Insights

We would be happy to answer all your queries...

contactus@thinkinghats.info

Thinking Hats Consumer Insights LLP

Bungalow 60/501, Unnat Nagar 2, Off SV Road,

Goregaon (West), Mumbai 400062

www.thinkinghats.info

022-28788656



THINKING HATS

CREDITS: This presentation template was created by **Slidesgo**, including icon by **Flaticon**, and infographics & images from **Freepik** and illustrations by **Storyset**