

Marketing to Generation Z - US - May 2021

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- The impact of COVID-19 on Gen Z and consumer behavior
- Recessionary impact on Gen Z consumers' attitudes and employment
- Gen Zs' relationship with social media and technology
- Attributes other than price that are important to Gen Z when purchasing products

Gen Z consumers straddle adulthood. Half are tweens and teens (aged 11-17) and half are young adults (aged 18-24). Relatively young, Gen Zs are just trying to create their own path that will differentiate them from previous generations. Wanting to be seen as creative, motivated and unique, they love brands that embrace their own individuality and help them do the same. They expect brands to stand up for causes they care about and act as partners in driving social causes forward. Refusing to even let the COVID-19 pandemic hold them back, they plan to return to normal life within the year.



“Refusing to fall in line with previous generations, Gen Z consumers are adamant about forging their own path. They want to be seen as change makers, who aren't afraid to take on the world's biggest issues. However, behind the scenes, increased use of technology and the stress of adult issues result in this generation feeling alone in the world.”

– Ariel Horton, Lifestyle and Leisure Analyst

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- **What you need to know**
- **Key issues covered in this Report**
- **Definition**
- **COVID-19: market context**

EXECUTIVE SUMMARY

- **Top takeaways**
- **Market overview**
Figure 1: Percentage of Gen Z kids and adults, 2016, 2021, 2026
- **Impact of COVID-19 on Gen Z**
- **Determined to return to “normal”**
Figure 2: COVID-19 opinions, Gen Z adults indexed to all adults, April 2021
- **Previous recession foreshadows a slow economic recovery for young adults**
Figure 3: Short-, medium- and long-term impact of COVID-19 on Generation Z, May 2021
- **Opportunities and challenges**
- **Personal perceptions provide connection points for brands**
Figure 4: Adult Gen Z self-perceptions, Gen Z adults indexed to all adults, February 2021
- **Parents are their most important friends**
Figure 5: Correspondence analysis – Symmetrical map – Relationship associations for Gen Z adults, February 2021
- **Social media is necessary for communication**
Figure 6: Social media associations, February 2021
- **Value of purchase lies in quality tangible items that give back**
Figure 7: TURF analysis – Purchasing value, February 2021

THE MARKET – KEY TAKEAWAYS

- **Gen Zs are multicultural, single and living at home**
- **Half are adults, half are tweens and teens**
- **They are determined to return to normal post-pandemic**
- **Talk the talk, and walk the walk**

GEN Z BY THE NUMBERS

- **Gen Zs are in a formative period**
Figure 8: Share of population by generation, 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Gen Z is the most racially diverse generation to enter adulthood**
 Figure 9: Distribution of generations, by race, 2021
- Single and living at home**
 Figure 10: Marital status, by age, 2020
 Figure 11: Living arrangements of adults 18 to 24 years old, 2020
- Gen Zs have low annual income**
 Figure 12: Median household income, by age of householder, 2019
 Figure 13: Household income distribution, by age of householder, 2019

GEN Z SEGMENTS

- In 2021 Gen Z consumers are straddling adulthood**
 Figure 14: Percentage of Gen Z kids and adults, 2016, 2021, 2026
- Gen Z teens**
- Interruption in education**
 Figure 15: Gen Z teen education opinions, February 2021
- Teens are optimistic about their future careers**
 Figure 16: Gen Z teen career opinions, February 2021
- More aware of financial issues**
 Figure 17: Gen Z teen attitudes toward finances, February 2021
 Figure 18: Debit card for kids, March 2021
- Gen Z adults**
- Postsecondary education is being delayed and dropped**
 Figure 19: Attitudes toward education, by age, February 2021
- Career setbacks have already diminished optimism**
 Figure 20: Gen Z adult career opinions, Gen Z adults indexed to all adults, February 2021
- Interest in financial advice**
 Figure 21: Gen Z adult financial opinions, Gen Z adults indexed to all adults, February 2021

MARKET FACTORS

- Impact of COVID-19 on Gen Z**
 Figure 22: Short-, medium- and long-term impact of COVID-19 on Generation Z, May 2021
- Immediate impacts (2020)**
- Short term (2021)**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 23: Changes in spending priorities, Gen Z adults indexed to all adults, April 2021

Figure 24: COVID-19 opinions, Gen Z adults indexed to all adults, April 2021

- **Recovery (2022-25)**

- **Learnings from the last recession**

Figure 25: Unemployment rate for population aged 16-24, July of each year not seasonally adjusted, 1970-2020

Figure 26: Distribution of full-time employed youth, ages 16-17, 2018

- **Pessimistic in politics, but not causes**

Figure 27: Political views, Gen Z adults indexed to all adults, February 2020

- **Three in 10 Gen Z identify as LGBTQ+**

Figure 28: LGBTQ+ age distribution, 2017

MARKET OPPORTUNITIES

- **Understand Gen Z language**

- **Gen Z emoji dictionary**

Figure 29: Gen Z emoji dictionary, May 2021

- **It's the lingo for me**

Figure 30: Gen Z lingo dictionary, May 2021

- **Be bold and take a stance**

Figure 31: Colin Kaepernick's Change the Whirled, December 2020

- **Understand the privacy trade-off**

- **Recognize users to gain a following**

Figure 32: Gen Z adult social media usage, Gen Z adults indexed to all adults, February 2021

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Offer simplicity and nostalgia**

- **Help Gen Z achieve self-expression**

COMPETITIVE STRATEGIES

- **Mintel Global Trend Drivers**

- **Mintel Trend Driver: Experiences**

Figure 33: Mintel Trend Driver, Experiences

- **Animal Crossing provides escape through simplicity**

Figure 34: Animal Crossing New Horizons Prom Night, April 2021

- **Spotify wrapped provides short-term nostalgia**

Figure 35: Spotify 2020 Wrapped, December 2020

- **Mintel Trend Driver: Identity**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 36: Mintel Trend Driver, Identity

- **Skincare embraces the bold, messy and raw aesthetic**

Figure 37: Positive pimple plant, March 2021

- **Parade connects with Gen Z individuality through inclusivity**

Figure 38: Celebrate our birthday and you, October 2020

- **Express humor through self-deprecation**

Figure 39: Just happy to be here, December 2020

- **Tap into self-expression**

Figure 40: Expressing herself through two strap Crocs Classic Sandals, April 2021

THE CONSUMER – KEY TAKEAWAYS

- **Gen Zs are lonely**
- **They take pride in being creative and unique**
- **Parents are their lifeline**
- **They need help with financial education and resources**
- **Social media is a must**
- **Brands are partners in impacting change**

GEN Z SELF-PERCEPTIONS

- **Creative, unique and lonely**
- **Gen Z teen spotlight**
Figure 41: Adult Gen Z self-perceptions, Gen Z adults indexed to all adults, February 2021
- **Black Gen Z consumers feel more unique and motivated**
Figure 42: Self-perceptions, by race, February 2021
- **Frame ethics as innovation**
Figure 43: Self-perceptions – Ethical, by generation, February 2021

CONFIDENCE IN ADULTING

- **Young age results in less confidence in “adulting”**
Figure 44: Confidence in adulting – Confident, Gen Z adults indexed to all adults, February 2021
- **There are opportunities to provide more learning resources**
Figure 45: Confidence in adulting – Not confident, February 2021
- **Women need even more financial resources**
Figure 46: Confidence in adulting – Confident in finance, by gender, February 2021
- **Cooking brands have opportunity to expand market with Gen Z men**
Figure 47: Confidence in adulting – Confidence in cooking own meals, by gender, February 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

IMPORTANT RELATIONSHIPS

- **Parents are Gen Zs' most influential relationship**
- **Gen Z teen spotlight**
Figure 48: Correspondence analysis – Symmetrical map – Relationship associations for Gen Z adults, February 2021
Figure 49: Relationship associations for Gen Z adults, February 2021
- **They aren't afraid to be different from their parents**
- **Views on marriage and romantic relationships**
Figure 50: Dating and relationship preferences, Gen Z adults indexed to all adults, February 2021
- **What they look for in relationships**
Figure 51: Preferred traits in a partner, Gen Z adults indexed to all adults, October 2020
- **Excited to meet new people**
Figure 52: Post-COVID social goals, February 2021

RELATIONSHIP WITH TECHNOLOGY AND SOCIAL MEDIA

- **Almost all young adults are on social media**
Figure 53: Gen Z adult social media usage, February 2021
- **Gen Z teen spotlight**
Figure 54: Gen Z teen social media usage, February 2021
- **Social media associations**
Figure 55: Correspondence analysis – Symmetrical map – Social media associations, February 2021
- **YouTube**
- **Facebook**
- **Instagram**
- **TikTok**
- **Twitter**
- **Online content should feel authentic and real**
Figure 56: Preferences – Online opinions, February 2021
- **Gen Z has a dynamic relationship with social media**
- **Gen Z teen spotlight**
Figure 57: Technology opinions, Gen Z adults indexed to all adults, February 2021

INCREASING BRAND VALUE

- **Attributes other than price that impact purchase**
Figure 58: Purchasing value, Gen Z adults indexed to all adults, February 2021
- **How to reach the majority of Gen Z**
Figure 59: TURF analysis – Purchasing value, February 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Lower incomes mean brands have more power to affect change**
Figure 60: Preferences – Supporting causes, February 2021
Figure 61: Everlane commitment to eliminate virgin plastic, January 2021
- **Preference for more tangible items**
Figure 62: Preferences – Experiences vs material things, February 2021

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Consumer survey data**
- **Consumer qualitative research**
- **Direct marketing creative**
- **Abbreviations and terms**
- **Abbreviations**
- **Terms**

APPENDIX – THE MARKET

Figure 63: Generations, by Hispanic origin, 2021
Figure 64: Median household income indexed to total households, by race and Hispanic origin of householder, 2019

APPENDIX – THE CONSUMER

Figure 65: Self-view, by Gen Z segments, February 2021
Figure 66: Correspondence analysis – Symmetrical map – Relationship associations, February 2021
Figure 67: Gen Z teen relationship associations, February 2021
Figure 68: Correspondence analysis – Symmetrical map – Social media associations, February 2021
Figure 69: Technology opinions, by Gen Z segments, February 2021

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.