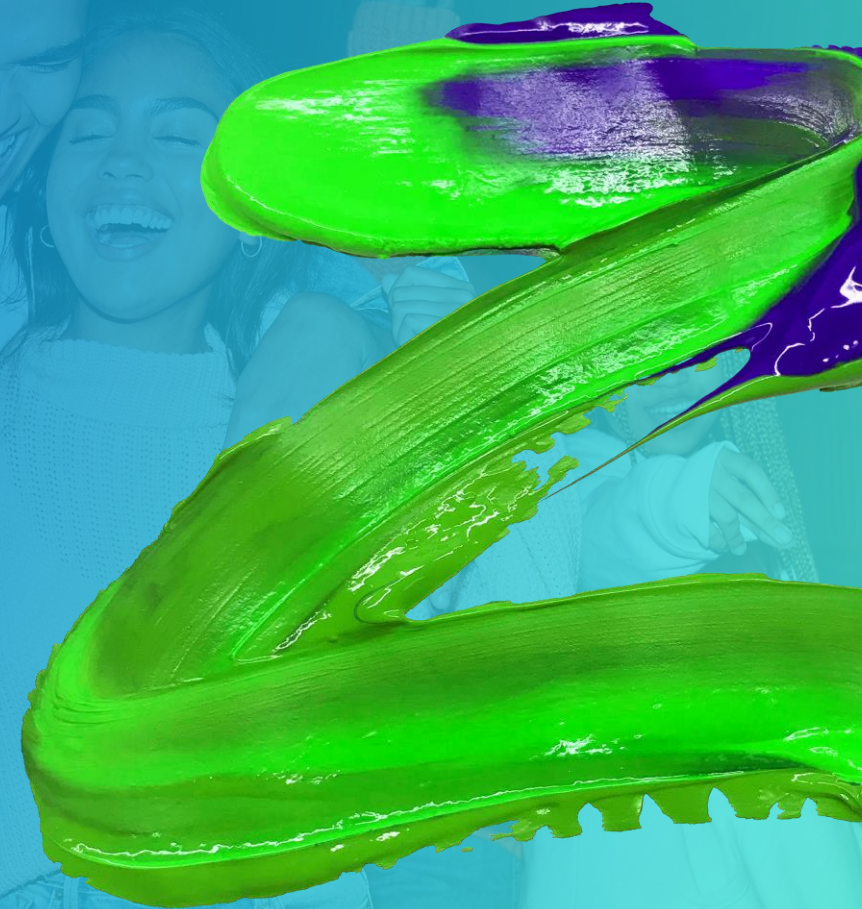# Edelman^Z

The Power Of Gen Z

Trust & The Future Consumer | December 2021

Exploring the world of Gen Z
Methodology

Global Survey

9,600 Gen Z, ages 14-24
6 markets
China, France, Germany, Mexico, UK, US

Virtual Discussions

60 minute, 1-on-1 interviews
12 Gen Z, ages 14-24
China, UK, US

Built with Them

Ongoing consultation and collaboration with Gen Z advisory council

* Developed by Edelman in partnership with Smarty Pants, an independent youth research firm

Global quantitative survey: 6-market online survey conducted in US, UK, Germany, France, Mexico, China among Gen Z respondents ages 14 – 24. Nationally representative. Fieldwork timing: Oct. 22 – Nov. 19, 2021. Virtual qualitative discussions: 60 minute, 1-on-1 interviews with 12 Gen Z respondents, ages 14 – 24 from the US, UK, and China. Fieldwork timing: Nov. 8 – 19, 2021

Macro cultural forces shaping the world

Forces breaking the world:

Climate Change
Ongoing Global Pandemic
Economic Recession & Jobs
Racism & Discrimination
Social & Political Unrest
Mental Health
Disinformation

Forces piecing it back together:

Identity & Inclusivity
Creator Economy
Power of Employee/Employer
Social Networking
Innovation

What we think we know about Gen Z's world doesn't reflect reality

01

Accepted Belief

Gen Z all want to be influencers

▼

New Reality

Only 12% aspire to be an influencer

02

Accepted Belief

Gen Z are bold, bullish activists

▼

New Reality

66% believe that sharing is a form of activism (and it's not radical)

03

Accepted Belief

Gen Z mobilizes cancel culture

▼

New Reality

It's about accountability. 1 in 3 want brands to take responsibility for wrongdoing

04

Accepted Belief

Gen Z believes tech solves everything

▼

New Reality

45% say technology is not the solution to most problems

05

Accepted Belief

In TikTok they trust

▼

New Reality

YouTube is the most trusted, while TikTok ranks #5

Q20. Which of the following do you consider to be your most important personal goals and aspirations? / Q23. Which of these actions, if any, fit your idea of what it means to advance a social or political cause? Sharing information NET of Sharing information / Q26. In which of the following ways, if any, do you want brands/companies to get involved in advancing social or political causes / Q29 How much do you agree or disagree with each of these statements? I believe that technology is the solution to most problems / Q31 When looking for general news and information, how much would you trust each of these sources. Platforms ranked by NET top 4 (6-9), excluding platforms specific to only Chinese market.

Who they actually are

Generation of Sensibility

as they want to solve humanity's most glaring issues, they desire safety, value realism, and are making sensibility the new standard
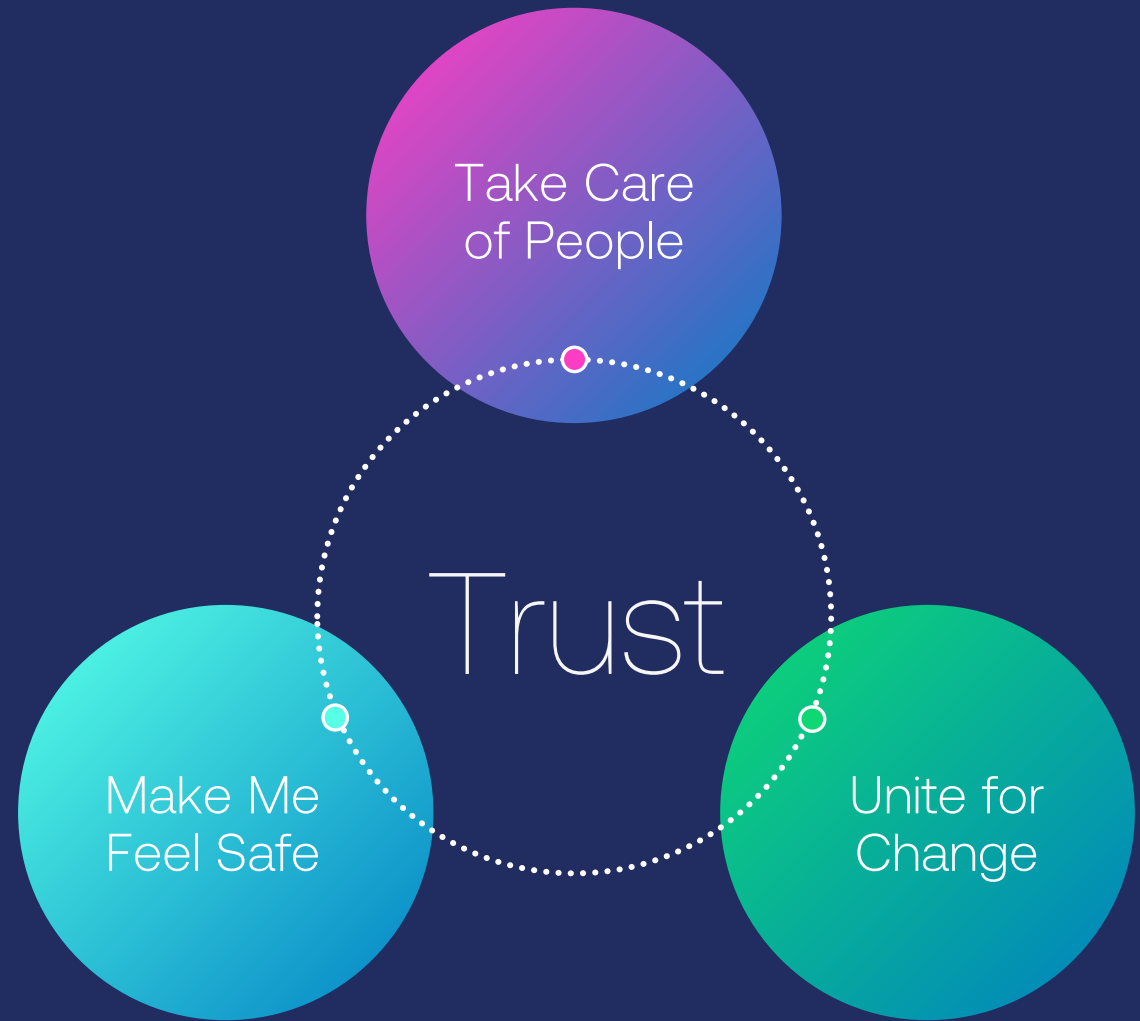
Globally Unified

set on course correcting & getting our world back to basics

Trust Differently

journey to trust-building looks different for this generation

Gen Z's journey to trust

MAKE ME FEEL SAFE

MAKE ME FEEL SAFE

The visceral need for safety & security permeates every aspect of their lives

7 in 10 want safety & security in their lives

▶ PHYSICAL
_____

Prioritize activities that have a lower risk of getting sick or injured (75%)

▶ EMOTIONAL
_____

Prioritize "feeling safe" (81%) over building strong friendships (75%)

▶ FINANCIAL
_____

Say "pays well/provides financial stability" is an important career goal (79%)

▶ SOCIAL
_____

Have changed social circles to feel safer (69%)

▶ EDUCATIONAL
_____

Say safety is critical or important when thinking about school (81%)

Safety in the form of health was exacerbated by COVID

Percent who say the COVID-19 pandemic impacted their attitudes

Describes me now

▼

78%

I have created more time in my life for self-care/mental health

▼

68%

I have started or continued to save up for future healthcare expenses

▼

66%

I have considered or started a career that will allow me to handle health and wellness expenses

Q28 In what ways, if any, has the COVID-19 pandemic impacted your attitudes and behaviors related to your health and wellness? I have created more time in my life for self-care/mental health, I have started or continued to save up for future healthcare expenses, I have considered or started a career that will allow me to handle health and wellness expenses. NET Describes me now, but I believe only temporarily/until the pandemic ends & Describes me now, and I believe it will describe me in the future

Gen Z finds their way to truth

70%
always **fact check** what you say and will unfollow you if you're not truthful

58%
say the content on **search engines** is trustworthy

Top 2 trustworthy criteria:

1. Links to legitimate sources

2. Citations of supporting data/proof points

Q36 Now think about your personal online social media network: how you use it, who you follow and your followers. How much do you agree or disagree with each of these statements? I always double check claims or news I see on social media — one source is not enough. NET Mostly Agree and Completely Agree. Q30 For each of the following types of media, how much of their content do you think is absolutely true and trustworthy? Search Engines: such as Google, Yahoo!, Bing [SHOW ONLY IF CN: or Baidu] . Q35 When it comes to the information you see online, what are the most important things you look for to determine whether something is true and trustworthy? There are links to legitimate sources supporting it , It cites supporting data/proof points

TAKE CARE OF PEOPLE
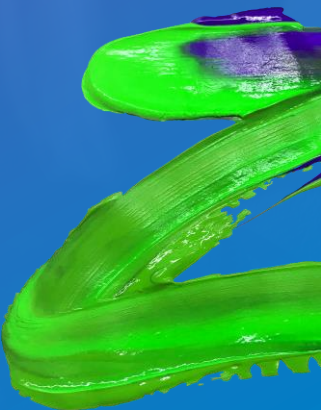
People they trust most are those that take care of others

Percent who say they trust each the most

▲ **Most trusted people**

Doctors/therapists (**77%**)

Scientists (**75%**)

Teachers/professors (**74%**)

An expanded sphere of influence

▼ **Less trusted people**

Traditional celebrities (**50%**)

CEO's (**50%**)

Government leaders (**47%**)

Q33 Below is a list of types of people or groups. For each one, please indicate how much you trust that individual or group (i.e., is it trusted to be accurate, factual or truthful)? 1-9 scale. Trust NET top4 (7-9).

Inspiration is from real people

Percent who describe each as sources of inspiration in their life

▲ **People Who Are Close & Relatable**

Family members **(88%)**

"Friends" **(84%)**

Ordinary people doing good **(81%)**

▼ **People Who Represent the Inaccessible & Distant**

Journalist **(47%)**

Religious/faith leaders **(44%)**

Politicians, rank lowest **(42%)**

Q18 Think about the types of people/groups who are sources of inspiration in your life. Please describe how inspirational, if at all, the following types of people are to you. NET Extremely or Somewhat

8 in 10

consider if a brand treats employees well as a critical or important purchase decision factor

7 in 10

evaluate a brand's work to support/ give back to those in need when considering whether to work there

The real test of a brand is how it treats people

Q43 When it comes to brands in general that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. It treats its employees well. NET Critical deal breaker or Important to have. Q22 Thinking about your future or potential employment and career, please tell us how important the following are to you when it comes to the place you choose to work or the career you want to pursue. My work supports/gives back to others in need. NET Critical/must have and Important to Have.

UNITE FOR CHANGE

Unity is Gen Z's superpower

Unity is the definition of activism for this generation

It's not radical, it's about coming together to create change for a common good

Q25 With which social or political causes are you currently involved? NET one or more causes.

Causes Bring Them Together

70%

of all Gen Zers globally are involved in a social or political cause

"Activism is a social, political, environmental revolution to change society. I don't think you can do that alone."

— 23-year-old Female, China

Common causes they unite around

Globally

▶ **Climate Change**   ▶ **COVID-19**   ▶ **Social Justice**

By Country

Ranked by cause with highest involvement rate in each country

	China	France	Germany	Mexico	UK	US
1	COVID-19 pandemic	Climate change	Climate change	COVID-19 pandemic	Climate change	Racial injustice
2	Education access	Gender equality	COVID-19 pandemic	Gender equality	Mental health	Mental health

Q25. With which social or political causes are you currently involved? Among those currently involved in social or political causes. NET one or more causes.

They want brands to use their superpower

Brands are expected to use their reach, money, and scale to create the change

9 in 10

want the brands they buy to get involved in causes that better the world

Trust is now about "we" not "me"

Gen Z is more interested in brands generating trust that address the needs of the many vs. relevance to "me" alone

The Self (personal relevance) attribute is lowest for Gen Z, but also considerably lower than among adults 25+ (51%)

Q42 Which of these do you think are the most important characteristics of a trustworthy brand? Statements netted into five dimensions Dependability, Integrity, Ability, Purpose, and Self. Edelman ETM Brand Tracker 2021 "To what extent do you agree with the following statements about [BRANDS]?" SELF dimension Net Agreement.

Important Characteristics of a Trustworthy Brand

Dependability	Integrity	Ability (Function)	Purpose	Self (Relevance)
61%	59%	57%	51%	38%
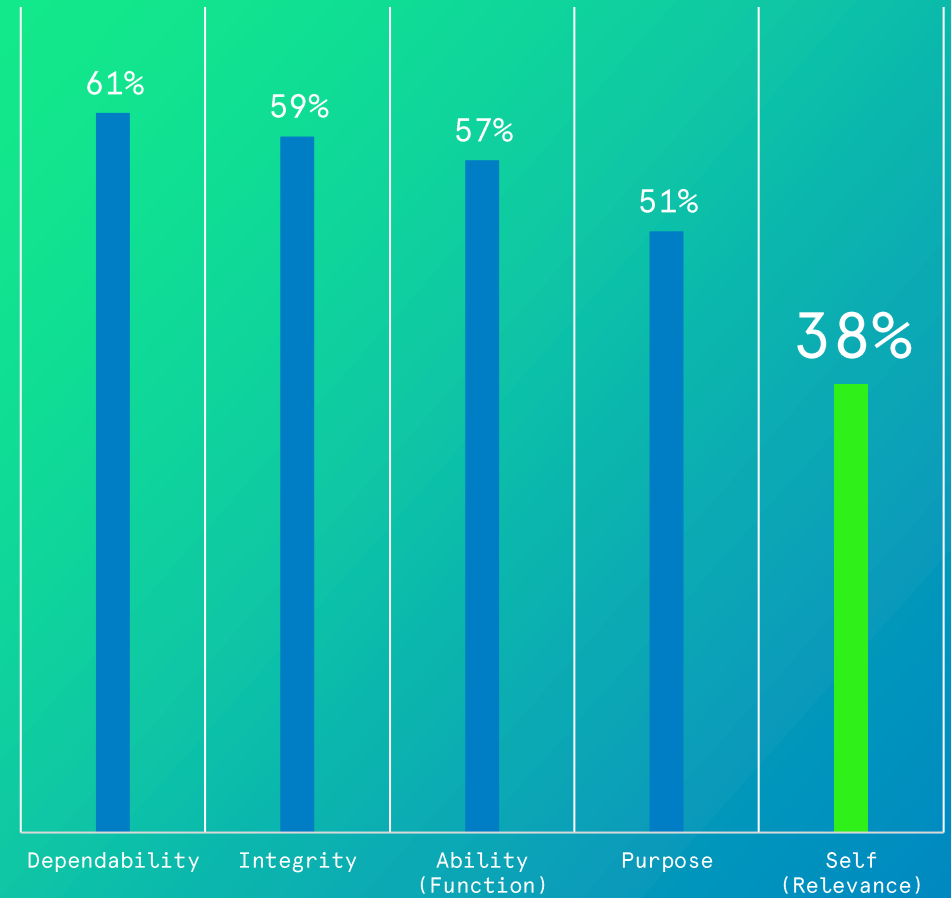
A generation that buys on beliefs & values

Gen Z

▼

63%

buy/use brands who take a stance on social issues they care about

vs.

▼

85% say trusting a brand is critical or important for purchase

Adults 25+

▼

49%

buy brands that express opinions on societal and political issues they care about

WHAT THIS MEANS

There is a new journey to earning trust

Make Me Feel Safe

- Consider basic needs vs. aspirational experiences

- Deliver on safety through every aspect of their lives

- Transparency needs to be discoverable — Gen Z looks for truth

Take Care of People

- Focus on real people & creators vs. inaccessible personalities

- Substance is the new sizzle

- Take care of your people – Gen Z is watching

Unite for Change

- Trust is about "we" vs. "me"

- Emphasize global values vs. hyperlocal actions

- Harness Gen Z's definition of activism by bringing them together

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