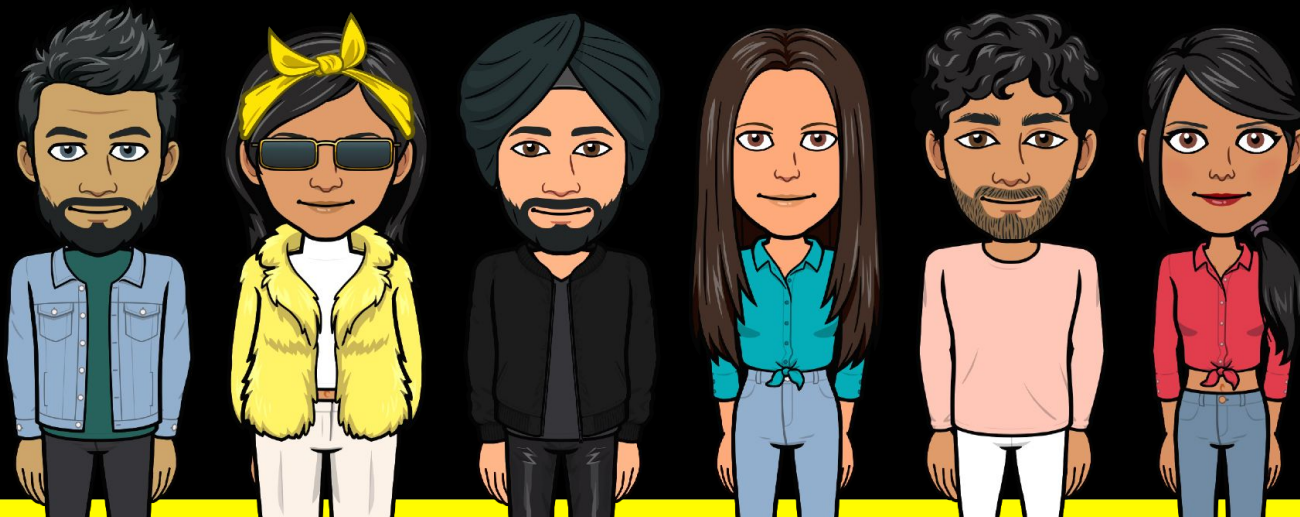




Capturing the Gen Z Mindset
Tracking behaviour | **Q1'25 Findings**



The Business Context

Gen Z is a rapidly growing and influential demographic in India, characterized by their digital savvy, social consciousness, and unique perspectives that will shape the country's future.

Snapchat's core philosophy of visual messaging aligns well with Gen Z's digital habits – authenticity, inner circle, personalised & fun and private.

Snapchat has the potential to be a unique platform to target the Gen Z audience.

Thus, Snapchat intended to partner with Kantar to develop an understanding of GenZ



Target Group and Sample Size



Target Group

- Gender : Male / Females
- Age: (Gen Z : 18 - 28 years)
- Socio Economic Class: NCCS A
- Own a personal smartphone
- Actively engage with social media platforms



Methodology

CAWI



Centres

- **Metros** Delhi NCR, Mumbai, Chennai, Bengaluru, Hyderabad, Pune, Ahmedabad, Kolkata
- **T1 Towns** Jaipur, Lucknow, Guwahati, Indore, Kochi, Chandigarh, Patna, Nagpur



Sample Achieved

493 Gen Z respondents

What are we covering today

1

GenZ Cheat Sheet

Exploring their beliefs, values, and attitudes toward the world around them.

2

GenZ Career moves & Money vibes

Uncovering their career motivations and financial priorities.

3

GenZ: Brand Report card

Understanding their affinity with brands across different categories.



GenZ Truths



If it's not real, I'm out.

Authenticity > Hype. They don't buy into celeb culture or forced brand speak.



I buy what vibes with me — and my values.

Intentional shoppers — ethical, local, and personal choices matter more than just aesthetics.



Zoom out — work's not the whole screen

They'll show up, but only on their terms. Flexibility, hybrid setups, and vibe protection are non-negotiables.



AI-native, but not screen slaves

They're AI-native and trend-savvy — but they're also setting screen limits and craving digital balance.



Not chasing paychecks — building freedom funds.

They're not chasing paychecks — they're stacking smart. FIRE, FDs, and freedom are the real goals.



Public feed = aesthetic, DMs = authentic

Gen Z shares smart — curated for the public, real for the circle. DMs, alt accounts, and Close Friends are where it gets honest.



Fashion fuels identity

Myntra and H&M are winning because they get Gen Z's aesthetic fluency. Beauty brands? Still playing catch-up.



It's not perfect, but we're moving

They see progress in the economy and public spaces. Gen Z feels cautiously hopeful.

GenZ Sentiments > Gen Z Cheat Sheet



GenZ Cheat Sheet



Authentically messy > **curated perfection**



Local pride. Personal ties. **Deal hunter vibes.**



Conscious choices. Sustainability is non-negotiable.



They'll talk emotions, **but only where it's safe.**



Real life stays on Close Friends.



Tech-forward **≠ tech-addicted**





Authentically Messy > Curated Perfection



80%

Recommendations from
Influencers who share real
authentic experiences



75%

Recommendations from Influencers
with large followers

67%

Trust on celeb recommendations

The scores in % are those saying Remained same + Much more in last 3 months
Average Score in % = 79%



Local pride. Personal ties. Deal hunter vibes.

The scores in % are those saying
Remained same + Much more in last 3
months. Average Score in % = 79%

I Research To Find The
Best Deals And Offers

84%

I Buy Brands with
Personal Meaning to me,
not just brand name

85%

I Take Pride In Buying
Indian Origin Brands

83%

I am open to buying
niche/ less known brands

81%



**They'll Talk
Emotions, But Only
Where It's **Safe**.**



**Their Real Life
Stays On
Close Friends**

I am comfortable talking about
my personal life on social media

71%



I share my daily / regular
updates with only my close
friends and family

76%

I openly discuss my mental
health with friends or family

77%

The scores in % are those saying Remained same + Much more in last 3 months
Average Score in % = 79%



Conscious Choices. Sustainability is **non-negotiable.**



I pay more for
environmentally friendly
products

84%

I am prepared to invest
my time and money for
causes that I support

85%

I buy brands that are
ethically sourced,
sustainable

85%

Brands need to
demonstrate awareness
of their impact on the
environment

83%

The scores in % are those saying Remained same + Much more in last 3 months
Average Score in % = 79%



Tech-Forward ≠ Tech-Addicted

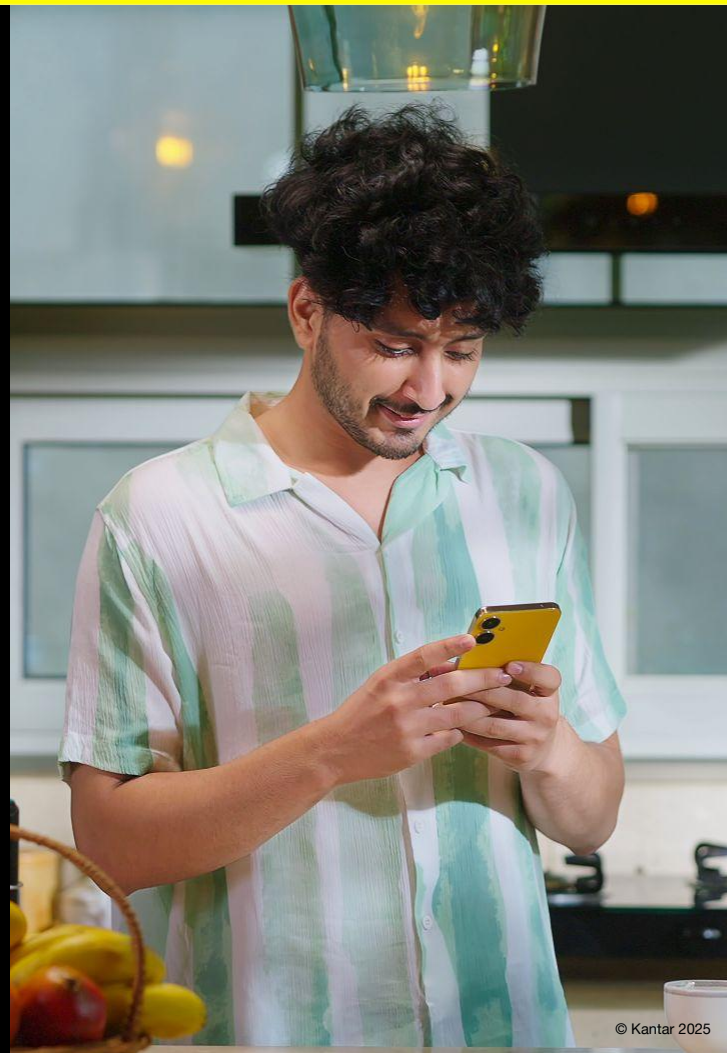
I use AI and AR in my
daily life

81%

I monitor and regulate my
screen time on my phone

82%

The scores in % are those saying Remained same + Much more in last 3 months
Average Score in % = 79%



GenZ: Career Moves & Money Vibes



Work Isn't My Life - It's Just One Tab.

Hybrid is the new safe space.

They're not allergic to office — they just want **choice**. 34% want Hybrid, but going to the office (25%) isn't a complete no

Gen Z likes flexibility. Millennials *live* by it.

65% of Gen Z say it's extremely important — but 80% of Millennials* make it a must.

Make Bank. Protect the Vibe

The salary's cool, but the **balance is non-negotiable**. Gen Z wants to make money(29%) *and* have a life (25%).



*The results of 493 GenZ respondents were also compared to 215 millennials respondents

Not Rich Yet, But Strategizing Softly

Less splurge, more strategy

3 out of 4 Gen Zers are saving at least 30% of what they earn — and investing it smart.

Playing It Safe But Showing Up.

40% of Gen Z play it safe with FDs, 33% go steady with stocks. They're not chasing crypto — they're stacking smart.

I want wealth, not just wages.

Gen Z isn't chasing the next raise — they're chasing long-term freedom.

- 31% want to build wealth
- 24% are aiming for FIRE (Financial Independence, Retire Early)



Brand Report Card: Gen Z Edition

These were the 20 brands covered in this wave of the study. They were categorized in 6 buckets -

1. **E-Tail:** Amazon, Flipkart, Meesho
2. **Beauty & Fashion:** Lakme, Pond's, Dove, Maybelline, Nykaa, Myntra, Ajio, H&M
3. **Quick Commerce:** Zepto, Blinkit, Swiggy Instamart
4. **Food Delivery:** Zomato, Swiggy
5. **Tech:** Samsung, OnePlus
6. **Beverages:** Coke, Pepsi

amazon.in Coca-Cola NYKAA AJIO

Flipkart meesho H&M zomato Swiggy

LAKMĒ POND'S SKIN INSTITUTE 1+ ONEPLUS Myntra

Dove MAYBELLINE NEW YORK SAMSUNG

blinkit Swiggy Instamart zepto PEPSI

Brand Report Card: Gen Z Edition



Amazon's not just everywhere - it's everything. Amazon is crushing it across consideration, love, advocacy, excitement, and affinity (135).

No favs in quick commerce/food delivery - yet. Instamart (107) leads slightly, but Blinkit (100) and Zepto (93) are close — no clear emotional winner. Zomato (105) & Swiggy (95) not different

Samsung tech's winning trust. OnePlus lost the cool factor. Samsung is a go-to (129) vs OnePlus

Glow-ups needed: Gen Z's not loyal to old labels. GenZ doesn't want "safe" — they want aren't afraid to show up loud. (Lakme 87, Pond's 82)

Myntra's & H&M serving. Ajio Not so much. ● Myntra scores high on affinity (138), H&M (116) ● Ajio (93) not showing up

Coke > Pepsi, but not by a mile. In beverages, Coke (108) leads, Pepsi (92) lags slightly. But neither is pushing cultural relevance.

Brand Report Card: Beauty & Fashion

Beauty:

Glow-ups needed - Gen Z's not loyal to old labels. GenZ doesn't want "safe" — they want aren't afraid to show up loud. (Lakme 87, Pond's 82)

Fashion:

Myntra's & H&M serving. Ajio not so much. Myntra scores high on affinity (138), H&M (116), Ajio (93) not showing up

LAKMĒ

POND'S
SKIN INSTITUTE

Dove

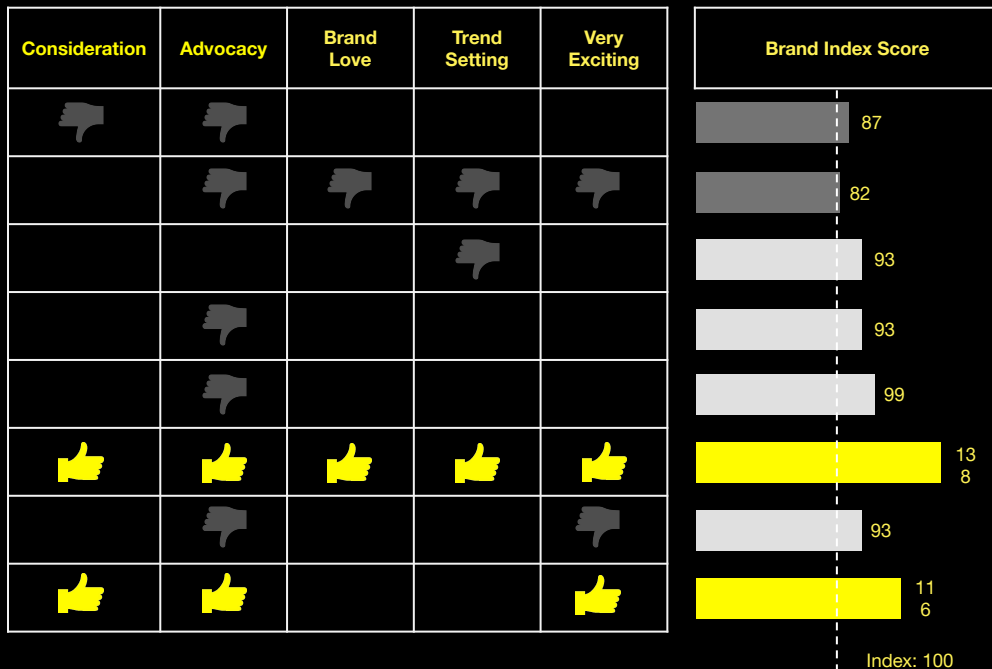
MAYBELLINE
NEW YORK

NYKAA

Myntra

AJIO

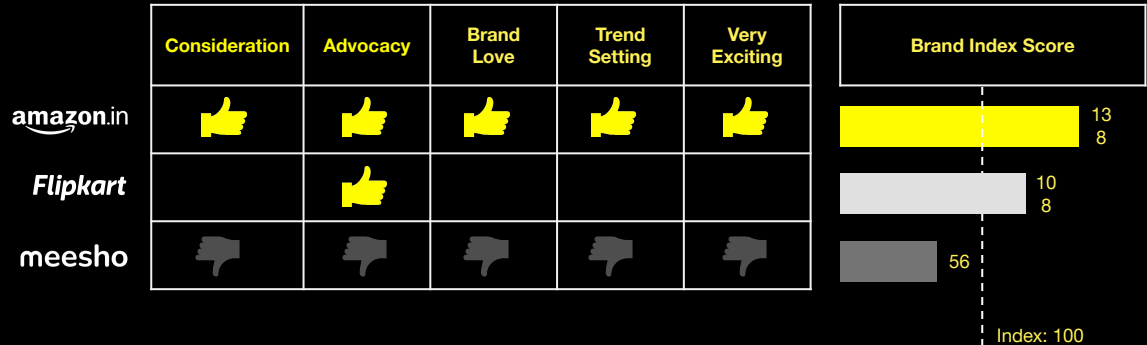
H&M



Brand Report Card: E-Tail

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Index to category average (>110)

Index to category average (<90)

Index score of 100 represents the category average, with brands scoring above indicating higher affinity and those below indicating lower affinity versus the category average.

Brand Report Card: Quick Commerce & Food Delivery

No favs in quick commerce/food delivery — yet.

Instamart (107) leads slightly, but Blinkit (100) and Zepto (93) are close — no clear emotional winner. Zomato (105) & Swiggy (95) not different.



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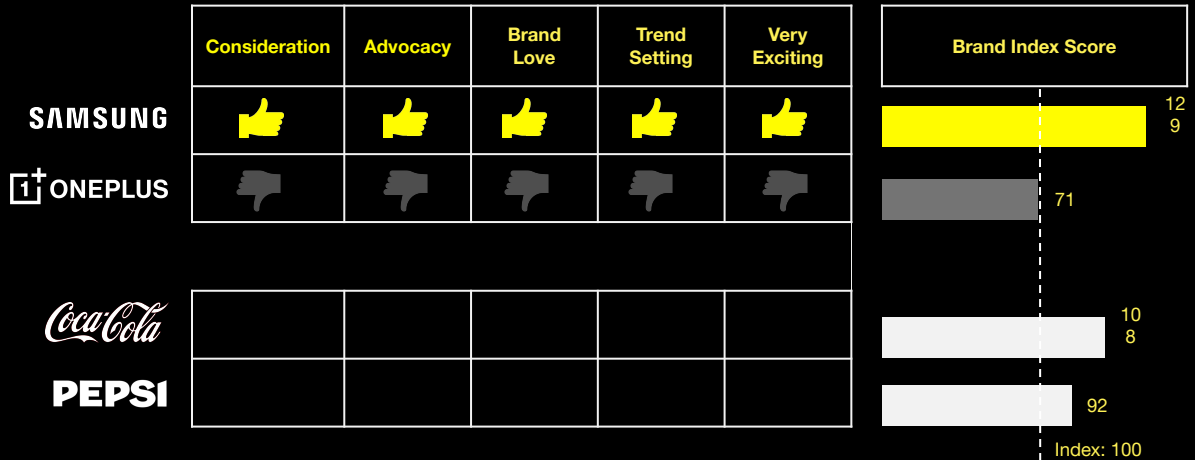
Brand Report Card: Tech & Beverages

Tech:

Samsung tech's winning trust. OnePlus lost the cool factor. Samsung is a go-to (129) vs OnePlus

Beverage:

Coke > Pepsi, but not by a mile. In beverages, Coke (108) leads, Pepsi (92) lags slightly. But neither is pushing cultural relevance.



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Kantar is the world's leading marketing data and analytics business and an indispensable brand partner to the world's top companies.

We combine the most meaningful attitudinal and behavioural data with deep expertise and advanced analytics to uncover how people think and act. We help clients understand what has happened and why and how to shape the marketing strategies that shape their future.

