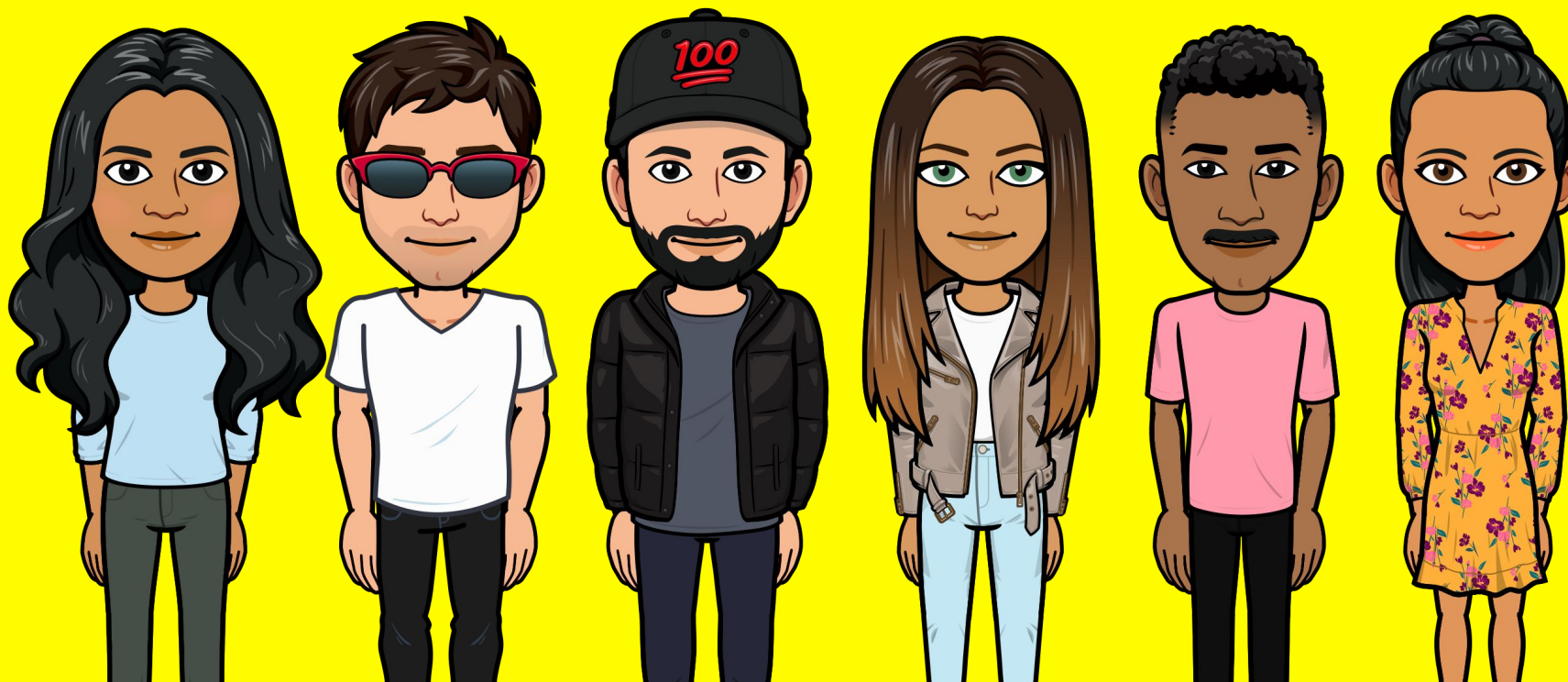


Capturing the Gen Z Mindset  
Tracking behaviour | Q2'25 Findings



# Background

Harnessing insights from Gen Z to help Snapchat strengthen its position as the go-to brand for engaging this audience.

The initial wave of the Snapchat Gen Z Index was released via ET, featuring multiple stories that explored Gen Z's values and perspectives on the world around them.

**We now present the findings from Q2 of the Snapchat Gen Z Index.**



# Target Group and Sample Size



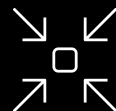
## Target Group

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

743 Gen Z respondents



# What are we covering today

1

## GenZ: Finding Their Sentiments

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

2

## GenZ: Brands That Click

Understanding their affinity with brands across different categories.

3

## GenZ: Dreams, Teams & Streams

What Gen Z believes about career goals and how they interact with IPL.





# Gen Z Sentiments > **The new rules of**



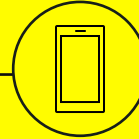
# Inside Gen Z's Mindset

The new rules of relevance



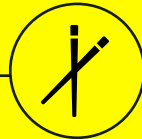
**“Ghar Ka Food = Gen Z Fuel”** 🍲⚡

“Mom-made vs Menu-made.”



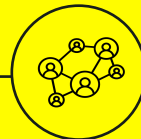
**“Scroll = Discovery”** 📱🛒

Video dekha, nazar mein aa gaya



**“Desi + Global = Gen Z Core”** 🌍

I love India... with a sprinkle of Seoul and a dash of Tokyo



**“Influence Doesn't Need a Blue Tick”** ✅

Show me a creator with 10K who feels real, not a celeb with 10M who feels fake.



**“Brand Naam Nahin, Brand Vibe Chahiye”**

Connection matters more than the logo



**“Smart, Not Sci-Fi”** 🤖📖

I don't need AI to blow my mind, I need it to save me time



# Scroll = Discovery

Video dekha,  
nazar mein aa gaya

% of those saying Yes – Avg = 80%

I frequently use social media to  
give / get the opinions

89%

I get ideas to try new brands  
from social media influencers

83%

I follow creators, accounts that  
share new trends, memes, viral  
content

85%

Q. Do you agree with the below statements? (Yes or No)

Average (Yes) : 80%





# Influence Doesn't Need a Blue Tick

Show me a creator with 10K who feels real,  
not a celeb with 10M who feels fake.

% of those saying Yes – Avg = 80%

60%

I trust celebrities' recommendations  
on the products to buy.

70%

I follow recommendations from  
influencers who have  
a large follower base.

85%

I follow recommendations  
from influencers who  
share real authentic experiences.

Q. Do you agree with the below statements? (Yes or No)

Average (Yes) : 80%



# Desi + Global = Gen Z Core

I love India... with a sprinkle of Seoul and a dash of Tokyo

86%

I appreciate the influence that other cultures have on our way of life in this country.

91%

I take pride in buying Indian-origin brands.

>

% of those saying  
Yes – Avg = 80%

<

67%

I aspire to own international luxury brands.

Q. Do you agree with the below statements? (Yes or No)

Average (Yes) : 80%



# Brand Naam Nahin, Brand Vibe Chahiye

Connection matters more than the logo



I am open to buying niche / upcoming / less known brands

% of those saying Yes – Avg = 80%

78%

% Remained Same + Much More in last 3 months Avg. = 79%

▲ 85%



I buy brands that have a personal meaning to me and my friends, than just focussing on the brand name.

▲ 86%

78%

Q. Do you agree with the below statements? (Yes or No)

Average (Yes) : 80%



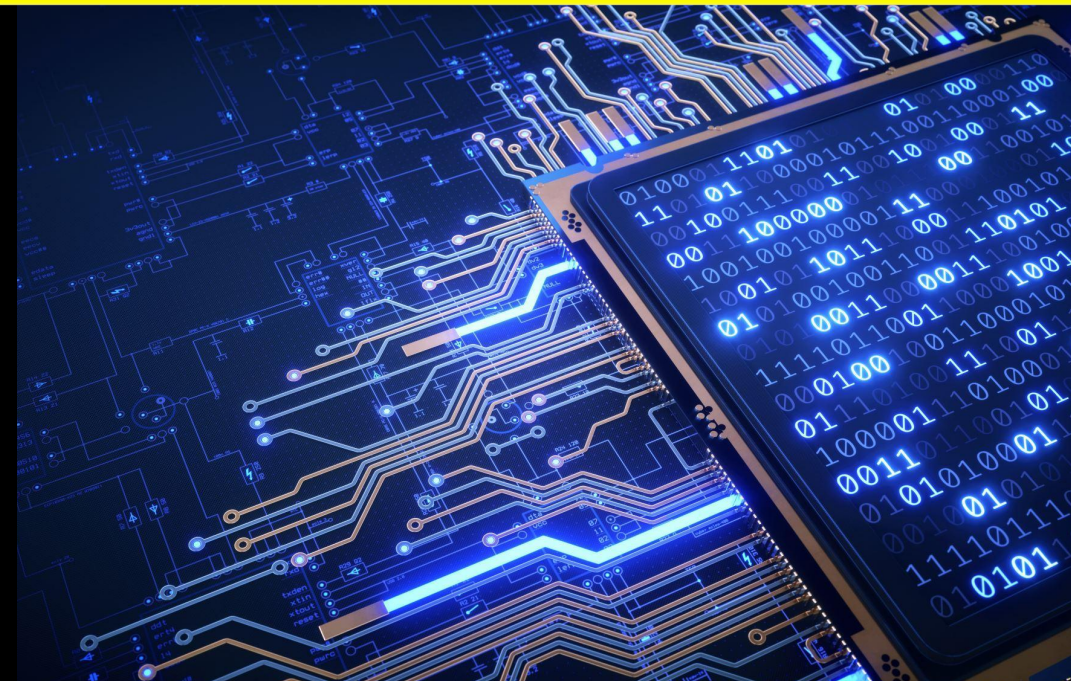


# Smart, Not Sci-Fi

I don't need AI to blow my mind,  
I need it to save me time

Why they use it?

- 32% use AI for academics ( 44% among students)
- 25% of GenZ are using it for work



I use AI and Augmented Reality  
in my daily life

71%



Among those saying 'Yes' , 51% (higher than  
avg. 42%) said I use AI and AR in my daily life  
much more in the last 3 months

76%

Q. Do you agree with the below statements? (Yes or No)

Q. Have you used AI tools (like ChatGPT, Gemini, Grok etc.) for any academic or work-related tasks recently?

Q. What's your main use of AI tools today?

Average (Yes) : 80%



# Ghar ka Food = Gen Z Fuel

Mom-made vs Menu-made

I regularly order in food delivery.

64%

I mostly eat homemade food and avoid eating out.

80%

Q. Do you agree with the below statements? (Yes or No)

Average (Yes) : 80%














# Gen Z: Brand Report Card





# Building the Brand Report Card

One category at a time

E-Commerce:	Beauty	Fashion	Food/Grocery Delivery	OTT	Mobile	Beverages
amazon.in	Dove	NIKE	zomato	NETFLIX	SAMSUNG	Coca-Cola
Flipkart 	LAKMĒ	adidas	Swiggy	prime video 		PEPSI
 Myntra	L'ORÉAL MAYBELLINE NEW YORK	PUMA 	 Swiggy Instamart	 JioHotstar	1 <sup>+</sup> ONEPLUS	
NYKAA	POND'S SKIN INSTITUTE	H&M	blinkit		vivo	
AJIO	FAE BEAUTY	ZARA	zepto	 MXPLAYER	oppo	CAMPA 

# Brand Report Card: E-Commerce

## Beyond Amazon, Gender Picks the Platform

Amazon's the go-to for all, but guys vibe with it more (162 vs. 126). After that, Flipkart leans male, Myntra clicks with women, and Nykaa? Bigger with her, barely on his radar (55) – but hardly any recall it as a platform.

### Top 3 Brands: Unaided Recall



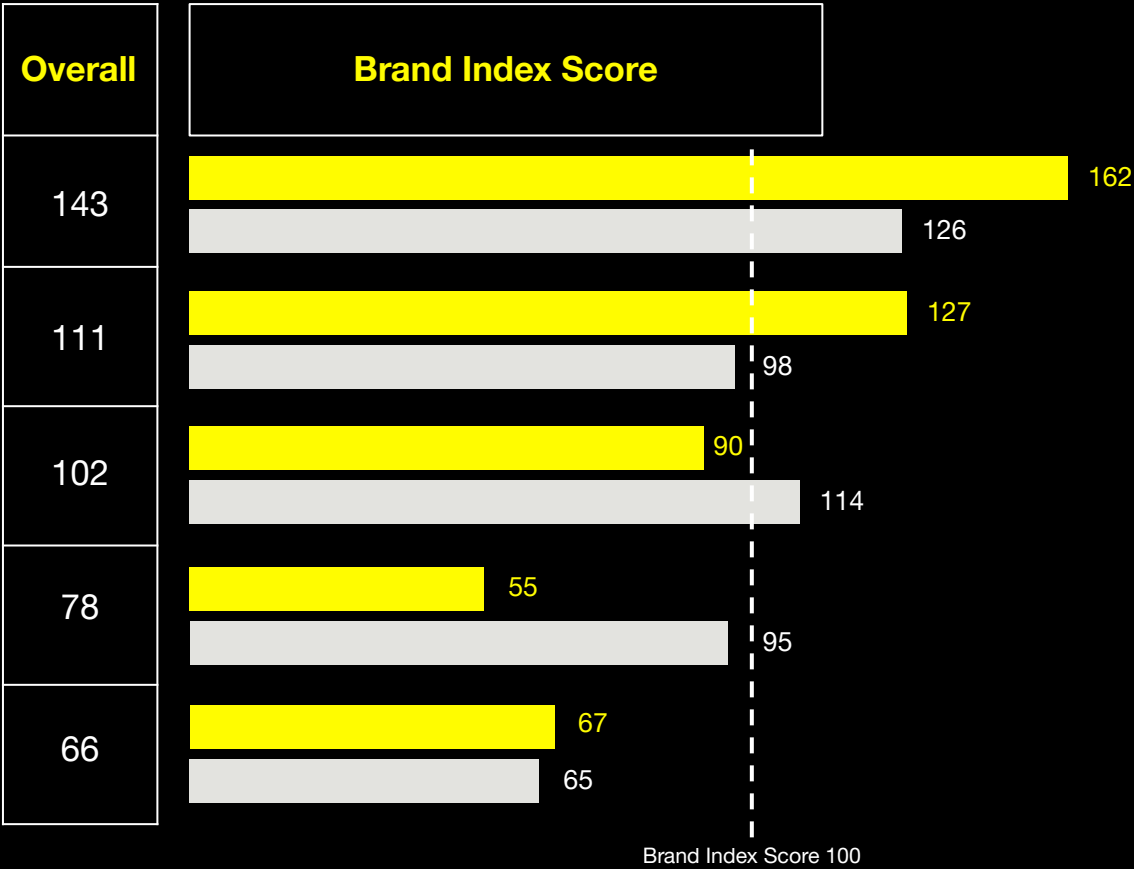
amazon.in

Flipkart

Myntra

NYKAA

AJIO



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.

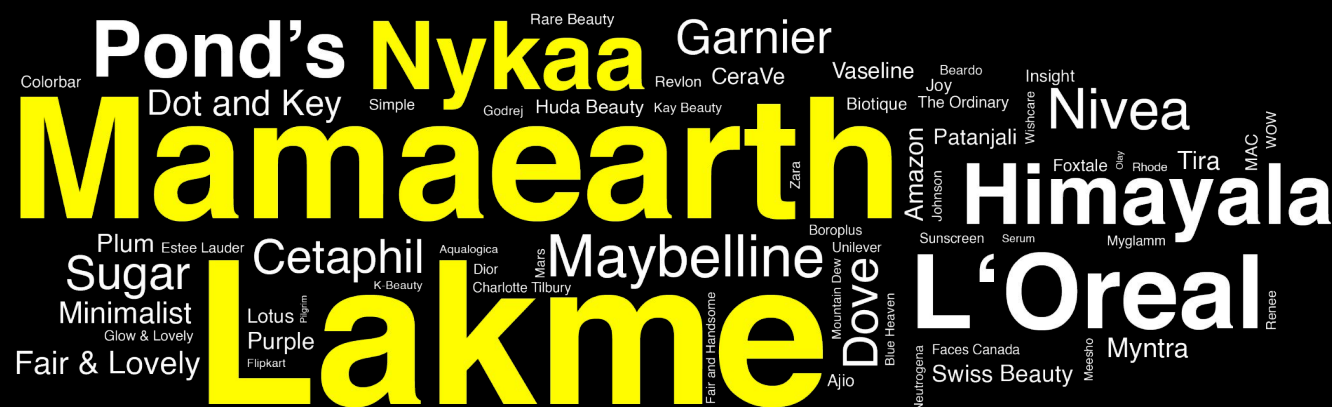
# Brand Report Card: Beauty

# Beauty Recall is Fragmented. Preference is Gendered.

It's a crowded space—consumers name-check multiple brands. Some differences in hierarchies by Men vs Women.

**Nykaa is remembered more as a beauty brand than a platform.**

## Top 3 Brands: Unaided Recall



## Brands recalled among Women

LAKMÉ

**NYKAA**

**mamearth™**

L'ORÉAL

**MAYBELLINE**  
NEW YORK

POND'S®



### Brands recalled among Men

LAKMÉ

**mamearth™**

**NYKAA**

L'ORÉAL



NIVEA

*Fair & Lovell*

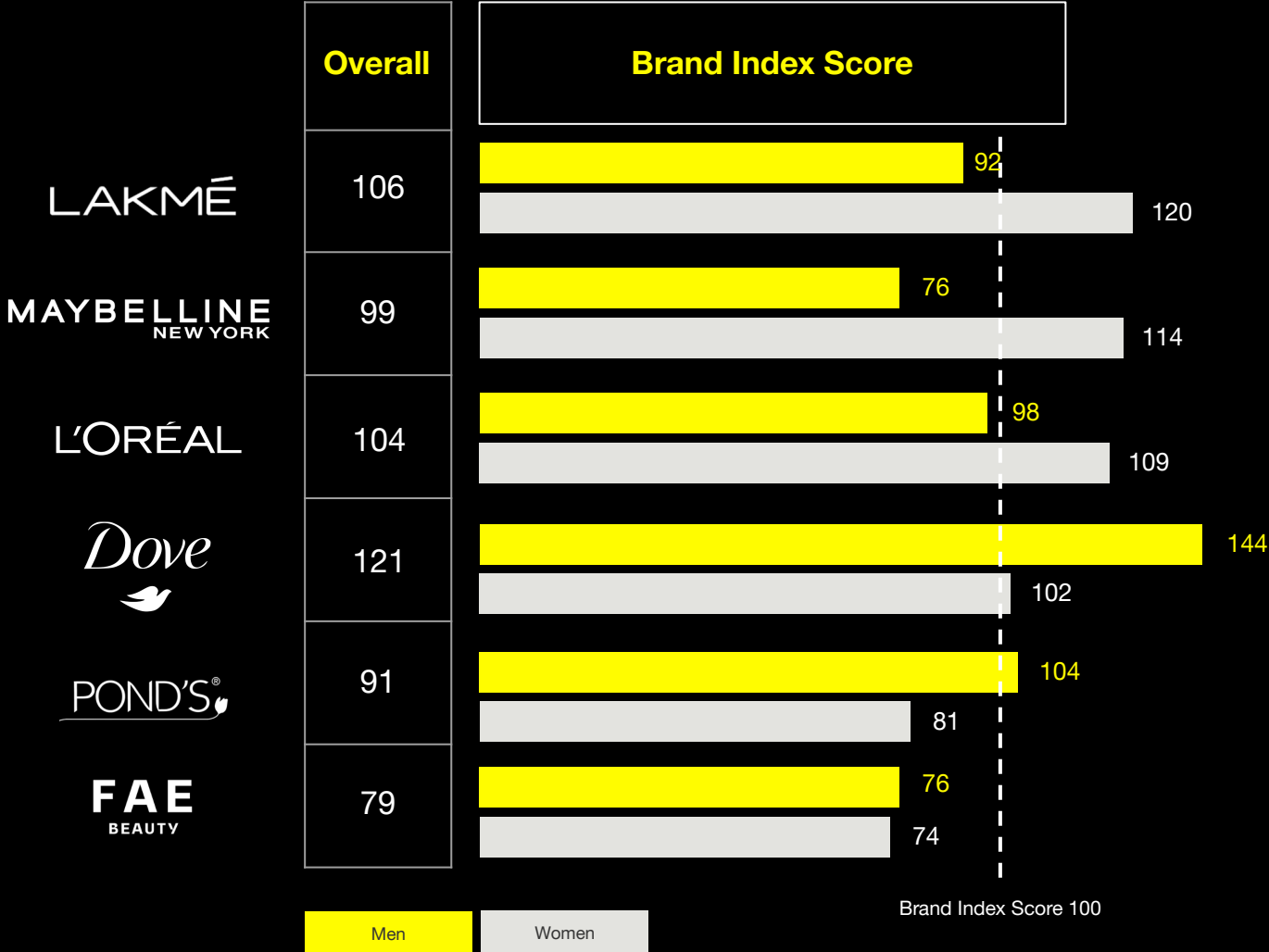
In order of hierarchy \_\_\_\_\_



# Brand Report Card: Beauty

## Beauty Recall is Fragmented. Preference is Gendered.

When it comes to gender preferences, the hierarchy flips: Dove connects better with men | Lakme (120) and Maybelline (114) top the list for women.



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: Fashion

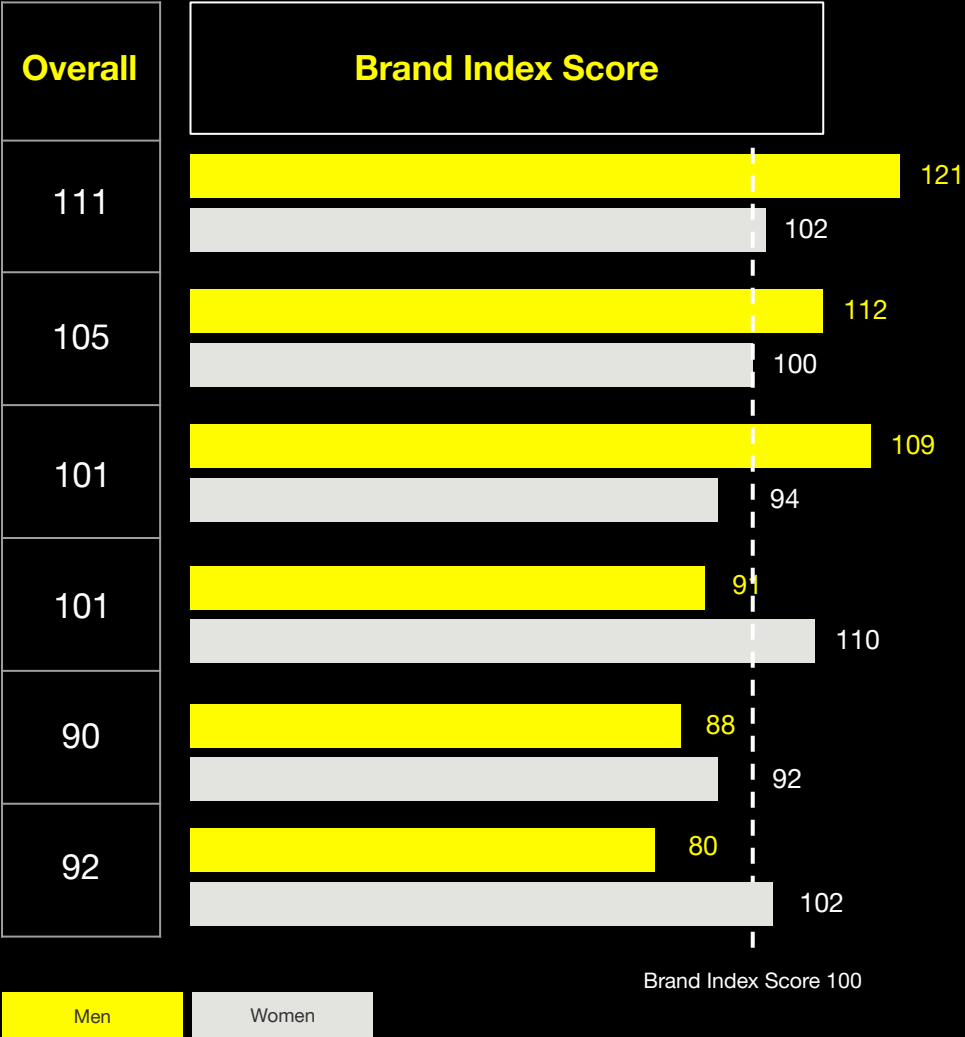
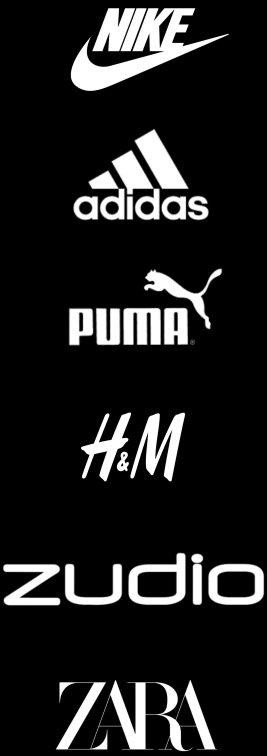
## Nike Tops for Him, H&M for Her—Zudio Misses the Mark

Nike leads with Gen Z men (index 121), followed by Adidas and Puma. Among women, H&M takes the lead, with Zara and Nike close behind.

### Top 3 Brands: Unaided Recall



Even in recall, Athleisure Wins Men, Zara, H&M win women



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: Online Delivery

## Zomato wins hearts — Zepto just gets recalled.

Zepto and Blinkit get high recall, however when it comes to affinity - Zomato leads in Gen Z affinity (Index 115), ahead of Swiggy Food (104), Blinkit (103), and Instamart (95). Zepto trails significantly at 82. Both gender and age groups feel the same.

### Top 3 Brands: Unaided Recall



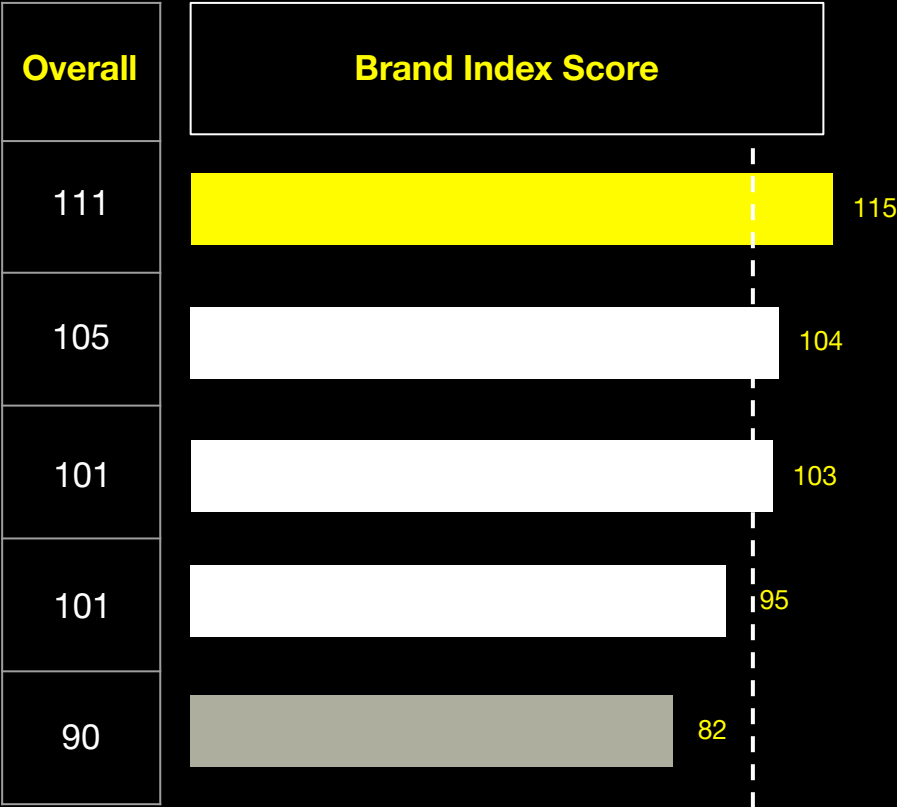
**zomato**

**Swiggy**

**blinkit**



**zepto**



Brand Index Score 100

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: OTT

## Netflix Owns the Stream. Especially with Gen Z.

Netflix leads OTT preference across age groups, with particularly strong pull among younger Gen Z.

### Top 3 Brands: Unaided Recall

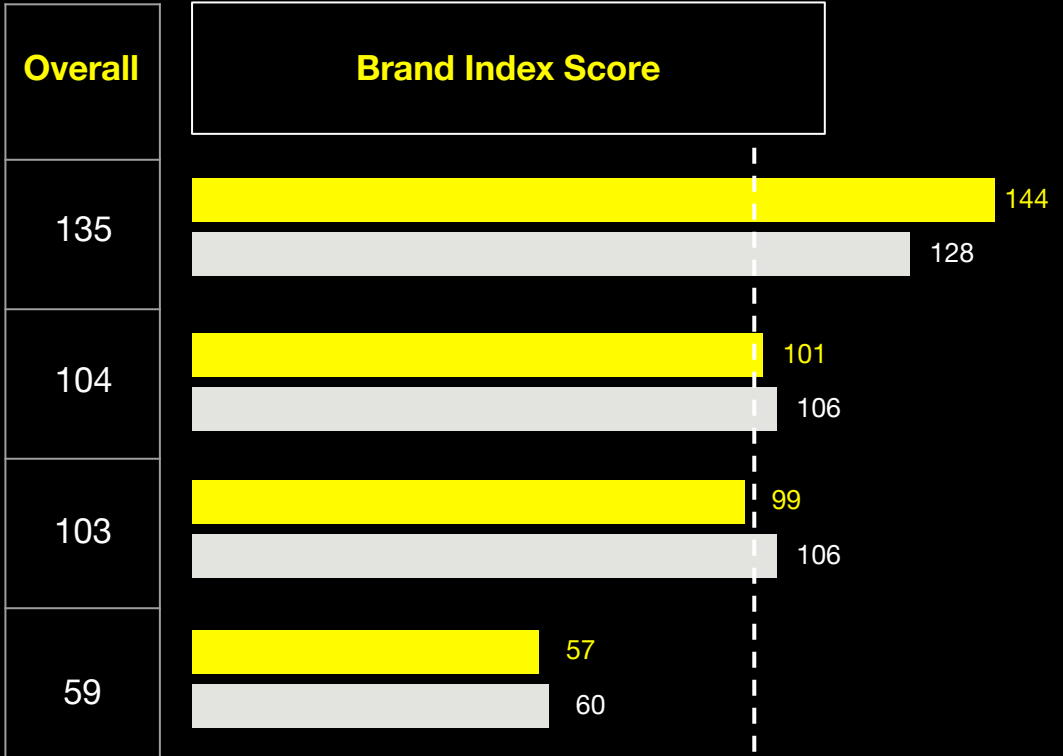


NETFLIX

prime video

JioHotstar

MXPLAYER



Men Women

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: Mobile

## Samsung and Apple Are In. Others Can't Relate.

Samsung (158) and Apple (133) lead Gen Z mobile brand affinity, significantly outperforming peers. Samsung stands out even more among younger Gen Z, indexing at a remarkable 171.

### Top 3 Brands: Unaided Recall



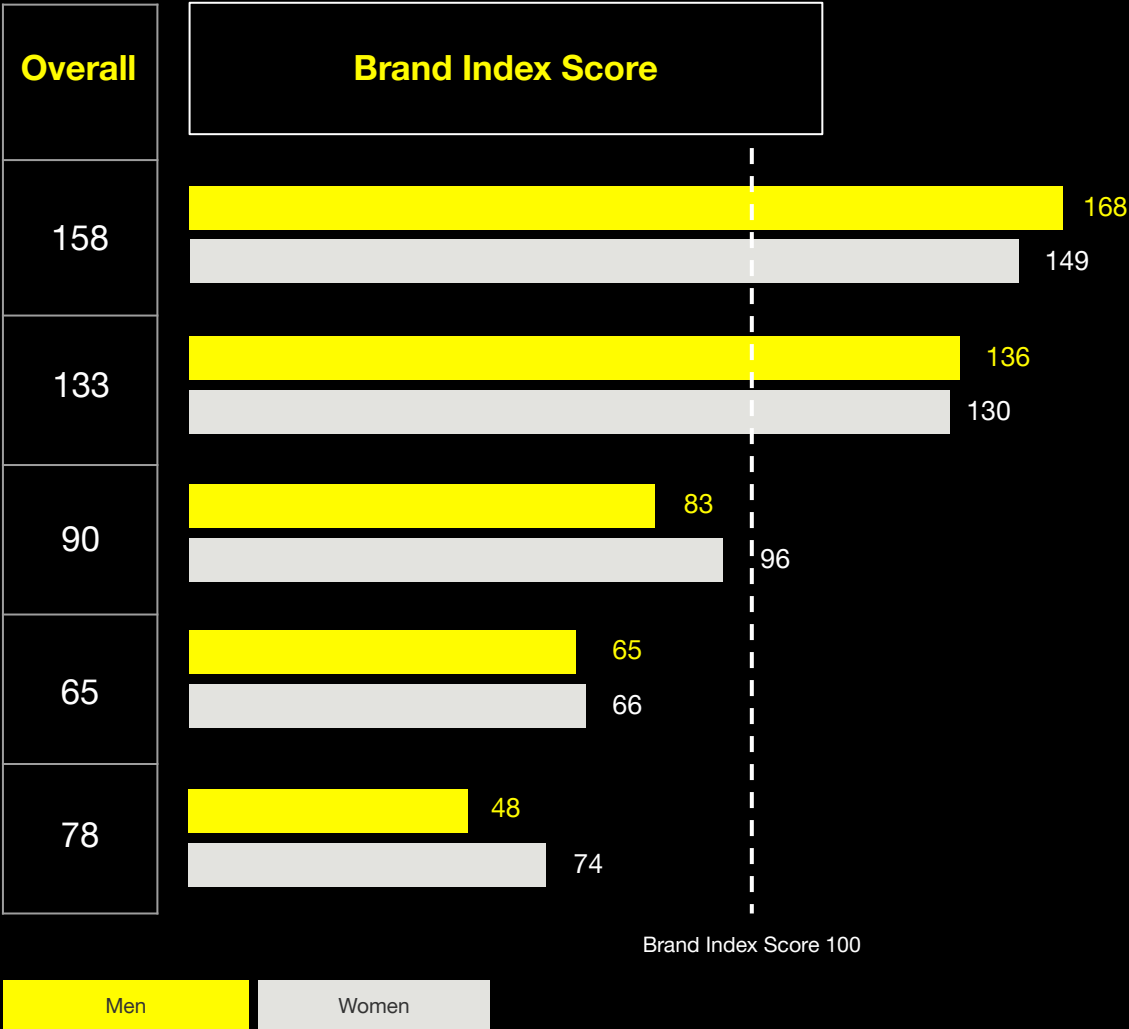
SAMSUNG



1+ ONEPLUS

vivo

oppo



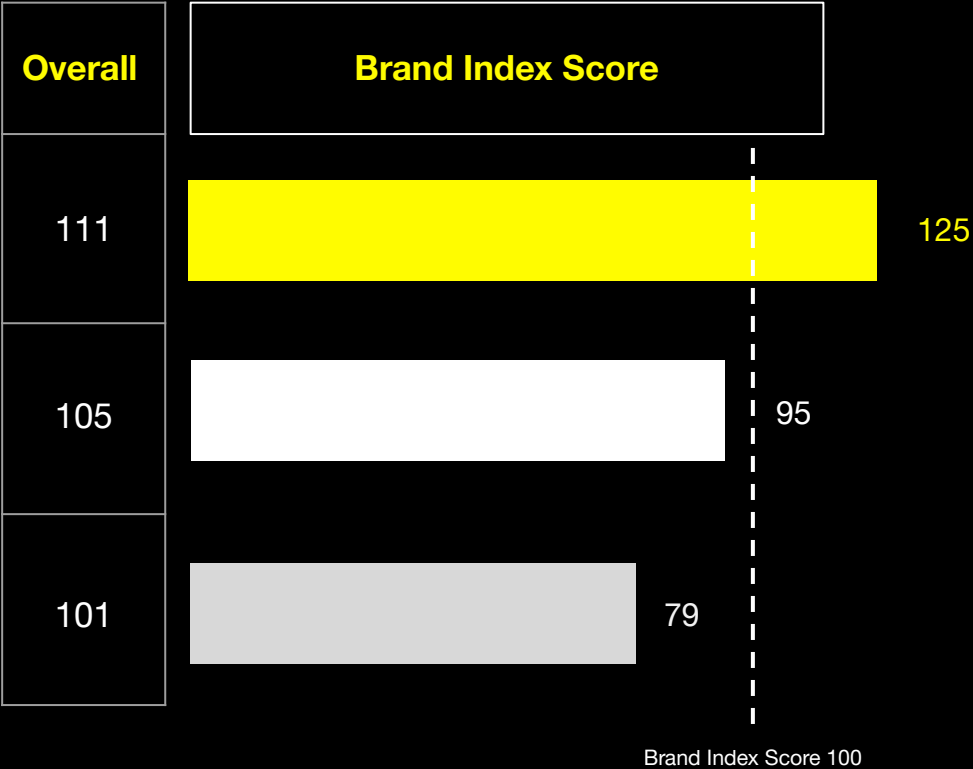
Index score of 100 represents the category average, with brands scoring above indicating higher affinity and those below indicating lower affinity versus the category average.

# Brand Report Card: Beverages

## Coke Pops. Campa Fizzles.

Coca-Cola enjoys strong Gen Z affinity, significantly over-indexing at 125. Pepsi hovers around average (Index 95), while Campa Cola underperforms at 79. This brand preference pattern remains consistent across both gender and age segments.

### Top 3 Brands: Unaided Recall



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.

# GenZ: Manifesting careers & watching IPL, playing fantasy



# Manifesting: a visa, a degree, and a future of choices



## Degrees Today, Dividends Tomorrow

- 44% want to complete a Master's + continue studying
- 82% of students plan to pursue higher education, many via loans/scholarships

Gen Z sees learning as a **long-term investment**, not a phase. They're willing to stretch timelines and finances to build future-ready careers.

### Opportunity:

- EdTech, online certification platforms, career counseling, test prep brands
- Banks/FinTech: student loan products, EMI plans



## Indian Roots, International Routes

- 67% of Gen Z students plan to study abroad
- Top reasons: Better job opportunities (39%), superior quality of education (33%)

Gen Z sees foreign education as a **career accelerator**, not just a dream. It's about outcomes, not just experiences.

### Opportunity:

- Study abroad platforms, visa consultancies, international colleges
- Travel & lifestyle brands: Student-specific offers
- Career platforms: Internships/mentorships for returning grads



## Offices, Ventures, or Government Benches

- 28% of employed Gen Z prefer corporate jobs — above the overall average of 25%
- 24% want to start their own business
- Meanwhile, 27% Gen Z students still show interest in government jobs (vs. 22% avg)

Equally split into **hustling, professional setups**, but some still want the **stability** of a sarkari setup.

### Opportunity:

- Employer brands: Showcase flexibility, learning, culture
- Career portals: Connecting them with the right employers
- Govt prep EdTechs: Reinforce purpose-led, social good narrative



# Cricket + Community + Commerce = Gen Z's IPL Formula



## Most Are Hooked, Some Are Slipping

62% of Gen Zs say their love for IPL has grown, even as 27% start to drift.



## Pitch Perfect: IPL Scores Big with Gen Z

85% follow IPL — far higher than any other sport. Especially strong among men and older Gen Z.



## For Gen Z, IPL means squad time

64% watch with family, 48% with friends.



## From Stadium to Store: IPL Ads Drive Action

53% of Gen Z search for or buy brands they saw during matches. IPL advertising – half are taking action



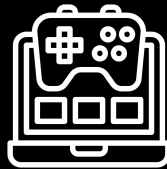
## Watch & Scroll: Second Screening is the Norm

81% of Gen Zs second-screen during IPL, with 54% diving into IPL content while they watch- dual-screen habit brands can tap into.



# Clicks, Cash & Competition

**Fantasy Leagues Are a Whole New Mood**



## **Fantasy is the New Normal**

63% of Gen Z have played fantasy leagues, signaling that what was once niche is now mainstream.



## **Money Talks — and Drives Clicks**

For 44% of Gen Z, fantasy sports is all about the cash.  
31% play with friends for bragging rights

# Cracking Gen Z: Pick Your Playbook



## Gen Z Shops with Their Thumbs, Not Their Wallets

Build content that sells. Partner with micro-creators who look like your buyer, not just celebrities.



## IPL Isn't Just a Sport — It's a Second Screen Shopping Mall

Build content that sells. Partner with micro-creators who look like your buyer, not just celebrities.



## The Creator Economy is About Relatability, Not Reach

Build content that sells. Partner with micro-creators who look like your buyer, not just celebrities.



## AI = Utility, Not Novelty

Forget AI hype. Focus on features that reduce decision fatigue, speed up checkouts, or auto-curate products. Time is currency.



## Made in India, Tuned to the World.

Lean into hybrid culture. This isn't fusion, it's the new native. Not choosing Desi vs Global Gen Z blends cultures like playlists.



## Brands Aren't Platforms — They're Personalities — Nykaa is the example

Blur the lines — make the purchase feel like joining a lifestyle, not just checking out.



## Gen Z is Investing in Their Future — Help Them Hack It

Don't sell to students — back their ambition. Position your brand as a life optimizer. Help Gen Z prep, plan, and pay for their future.



## Meaning > Mass Appeal

Show your why, not just your what. Align with subcultures, social causes, and creators who stand for something.







# Thank You!

## Q2'25 Findings | Executive Summary

# Brand Report Card: E-Commerce

Amazon's the go-to for all, but guys vibe with it more (162 vs. 126). After that, Flipkart leans male, Myntra clicks with women, and Nykaa? Bigger with her, barely on his radar (55)

	Brand Performance Matrix (Overall)					Brand Index Score				
	Consideration	Advocacy	Brand Love	Trend Setting	Very Exciting	Overall	Men	Women	18 to 23 Years	24 to 28 Years
amazon.in	👍	👍	👍	👍	👍	143	162	126	142	143
Flipkart 	👍	👍				111	127	98	112	110
 Myntra		👍				102	90	114	106	99
NYKAA	👎	👎			👎	78	55	95	75	80
AJIO	👎	👎	👎	👎	👎	66	67	65	65	68

Index: 100

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: Beauty

It's a crowded space — consumers name-check multiple brands. Lakme and Mamaearth lead recall, while Nykaa is remembered more as a beauty brand than a platform. When it comes to gender preferences, the hierarchy flips: Dove connects better with men | Lakme (120) and Maybelline (114) top the list for women

	Brand Performance Matrix (Overall)					Brand Index Score				
	Consideration	Advocacy	Brand Love	Trend Setting	Very Exciting	Overall	Men	Women	18 to 23 Years	24 to 28 Years
LAKMÉ						106	104	120	101	111
MAYBELLINE NEW YORK						99	76	114	98	101
L'ORÉAL		👍				104	98	109	107	101
Dove	👍	👍				121	144	102	129	114
POND'S®		👎			👎	91	104	81	90	89
FAE BEAUTY	👎	👎	👎			76	86	74	76	83
						Index: 100				
						<div>Index to category average (&gt;110)</div> <div>Index to category average (&lt;90)</div>				

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: Fashion

Nike leads with Gen Z men (index 121), followed by Adidas and Puma. Among women, H&M takes the lead, with Zara and Nike close behind.



Brand Performance Matrix (Overall)				
Consideration	Advocacy	Brand Love	Trend Setting	Very Exciting
	👎			👎
	👎			

Brand Index Score				
Overall	Men	Women	18 to 23 Years	24 to 28 Years
143	121	102	117	105
111	112	100	106	104
102	109	94	100	102
78	91	110	98	103
66	88	94	91	89
66	80	102	86	97

Index: 100

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: Food/Grocery Delivery

Zomato leads in Gen Z affinity (Index 115), ahead of Swiggy Food (104), Blinkit (103), and Instamart (95).  
Zepto trails significantly at 82.

<div>zomato</div> <div>Swiggy</div> <div>blinkit</div> <div><div><div></div></div>Swiggy Instamart</div> <div>zepto</div>	Brand Performance Matrix (Overall)					Brand Index Score				
	Consideration	Advocacy	Brand Love	Trend Setting	Very Exciting	Overall	Men	Women	18 to 23 Years	24 to 28 Years
	<div>👍</div>	<div>👍</div>			<div>👍</div>	<div>115</div>	120	111	120	111
						<div>104</div>	102	106	104	104
						<div>103</div>	108	100	100	107
						<div>95</div>	89	100	96	94
	<div>👎</div>	<div>👎</div>			<div>👎</div>	<div>66</div>	81	83	80	84

Index: 100

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: OTT

Netflix leads OTT preference across age groups, with particularly strong pull among younger Gen Z.

NETFLIX

prime video

JioHotstar

MXPLAYER

Brand Performance Matrix (Overall)				
Consideration	Advocacy	Brand Love	Trend Setting	Very Exciting
👍	👍		👍	👍
	👍			
👎	👎	👎	👎	👎

Brand Index Score				
Overall	Men	Women	18 to 23 Years	24 to 28 Years
135	134	136	144	128
104	105	103	101	106
103	109	96	99	106
59	59	65	77	60

Index: 100

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: Mobile

Samsung (Index 158) and Apple (133) lead Gen Z mobile brand affinity, significantly outperforming peers. Samsung stands out even more among younger Gen Z, indexing at a remarkable 171.

SAMSUNG



1+ ONEPLUS

vivo

oppo

Brand Performance Matrix (Overall)				
Consideration	Advocacy	Brand Love	Trend Setting	Very Exciting

Brand Index Score				
Overall	Men	Women	18 to 23 Years	24 to 28 Years
158	168	149	171	145
133	136	130	139	127
90	83	96	86	93
65	65	66	56	74
54	48	60	47	61

Index: 100

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: Beverages

Coca-Cola enjoys strong Gen Z affinity, significantly over-indexing at 125. Pepsi hovers around average (Index 95), while Campa Cola underperforms at 79.

This brand preference pattern remains consistent across both gender and age segments.

Coca-Cola

PEPSI

CAMPA

Brand Performance Matrix (Overall)					Brand Index Score				
Consideration	Advocacy	Brand Love	Trend Setting	Very Exciting	Overall	Men	Women	18 to 23 Years	24 to 28 Years
	👍		👍	👍	125	126	125	128	122
					95	93	97	96	95
👎	👎			👎	79	81	78	76	83

Index: 100

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.