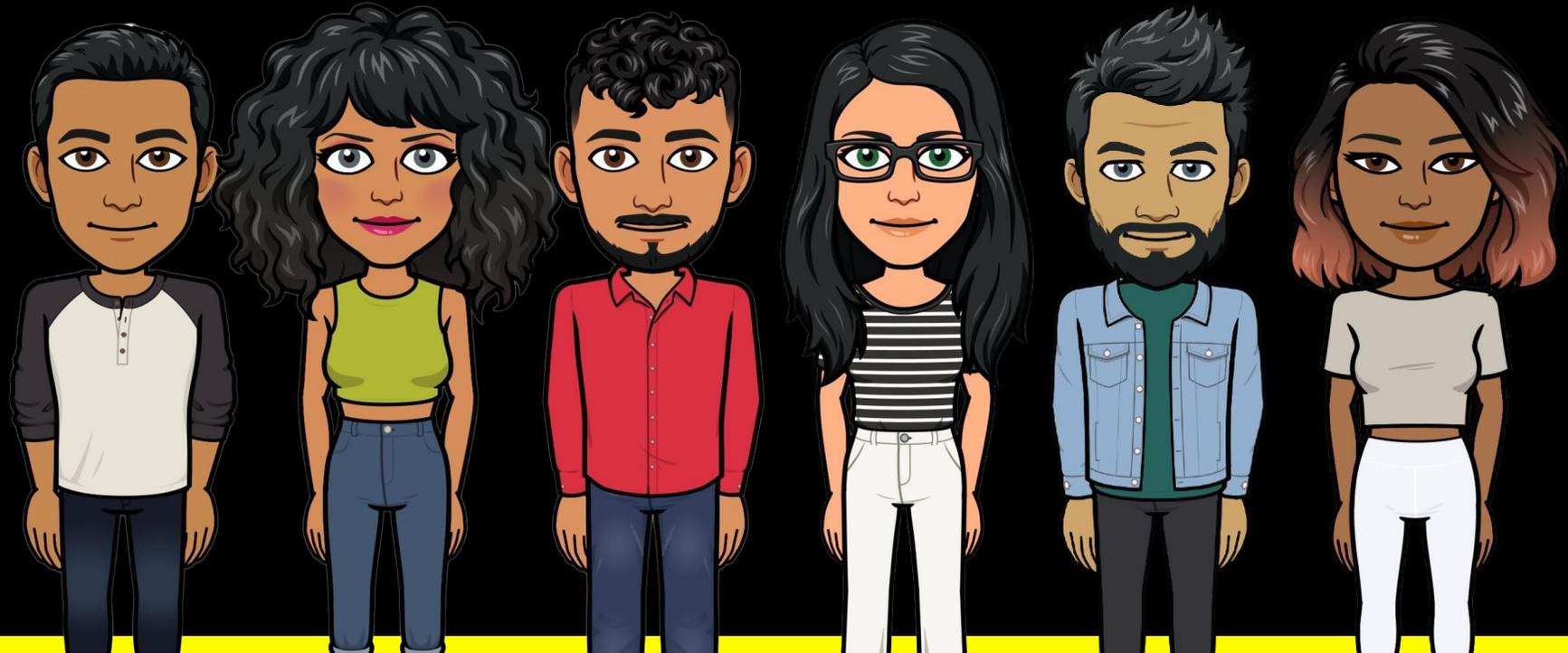


Capturing the Gen Z Mindset
Tracking behaviour | Q3'25 Findings



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 Q3 of the Snapchat Gen Z Index.



Target Group & Sample Size



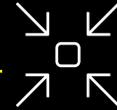
Target Group

- 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

741 Gen Z respondents

What are we covering today?

1

GenZ: Sentiments

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

2

GenZ: Brand Report card

Understanding their affinity with brands across different categories.

3

Gen Z: Health & Festive Goals

Understanding their health / fitness habits and festival lifestyle choices.



Gen Z Sentiments → What Matters & what changed



Inside Gen Z's Mindset

What matters remains the same

What they do more?

-  Always hunting best deals
-  Brands that vibe with them
-  Proud to buy desi
-  Trusting real influencer recos
-  Discover brands via creators
-  Open to cultural mix
-  Social media for opinions
-  Backing causes that matter
-  Choosing ethical, sustainable brands
-  Expect eco-aware brands
-  Following trends and memes

What they do less?

-  Luxury Goals
-  Celebrity Approvals
-  Influencer Backed Choices
-  Overshare Culture
-  Food Delivery Life
-  Mental Health Matters

Inside Gen Z's Mindset

Certain behaviors are gaining traction, even if done less often



From Kitchens to Clicks

Rasoi-made vs Ready-made



Premium Calling

Gen Z eyes the luxe life, a bit more



From Trendy to Trustworthy

Give me real talk, not just reels





From Kitchens to Clicks

Rasoi-made vs Ready-made

I mostly eat homemade food and avoid eating out

Q2	Q3
% saying Yes	
80%	74%
% Doing much more in last 3 months	
37%	33%

I regularly order in food delivery

Q2	Q3
% saying Yes	
64%	71%
% Doing much more in last 3 months	
24%	29%

Average (Yes) : 80% (in Q2 & Q3)

Higher vs Q2

Lower vs Q2

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

Premium Calling

Gen Z eyes the luxe life, a bit more



From Trendy to Trustworthy

Give me real talk, not just reels

I aspire to own international luxury brands

Q2	Q3
% saying Yes	
67%	70%
% Doing much more in last 3 months	
30%	33%

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

Q2	Q3
% saying Yes	
85%	85%
% Doing much more in last 3 months	
34%	31%

Higher vs Q2

Lower vs Q2

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

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	PUMA 	 Swiggy Instamart	 JioHotstar	 ONEPLUS	
NYKAA	MAYBELLINE NEW YORK	H&M	blinkit	 MXPLAYER	vivo	
AJIO	POND'S SKIN INSTITUTE	ZARA	zepto		oppo	
	FAE BEAUTY	zudio				

The Big Three of E-Com: Amazon, Flipkart & Myntra Stay Unshakable

Amazon, Flipkart & Myntra Lead the Pack

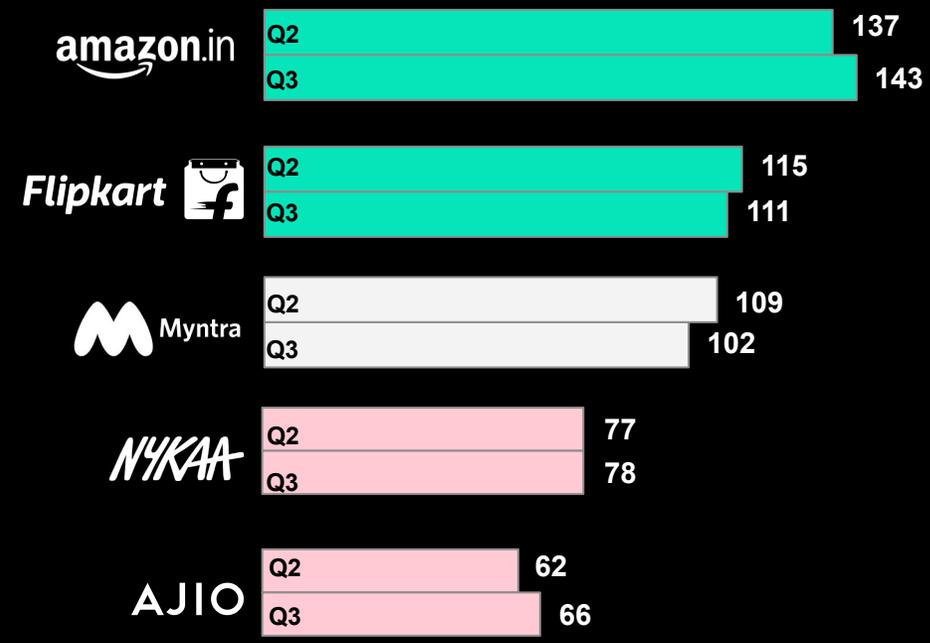


Index to category average (>110)

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.

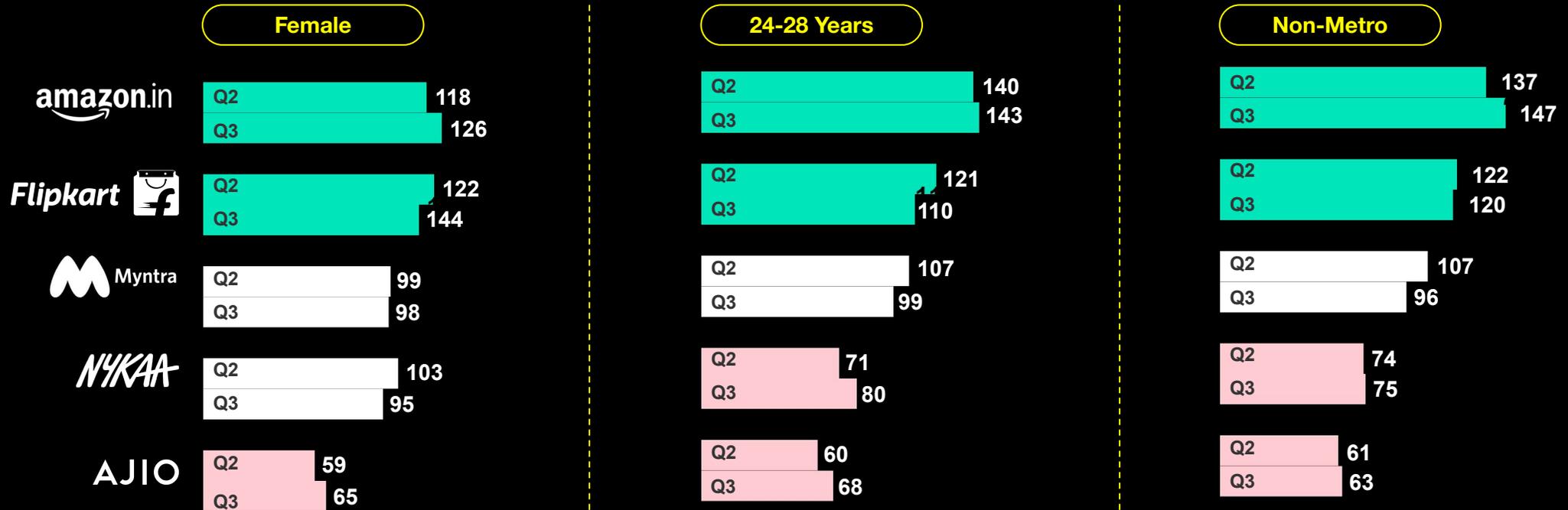
Brand Index Score - Overall



Brand (Overall)	Amazon	Flipkart	Myntra	Nykaa	Ajo
Q2	143	111	102	78	66
Q3	137	115	109	77	62

Myntra and Flipkart see growth across key segments

Myntra, stronger among women (114->122), older GenZ (99->107) & non-metro (96->107), Flipkart among older Gen Z (110->121). Nykaa improves (95->103)



Index to category average (>110)

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Brand (Overall)	Amazon	Flipkart	Myntra	Nykaa	Ajio
Q2	143	111	102	78	66
Q3	137	115	109	77	62

L'oreal shows growth

L'Oréal has improved among older Gen Z (101->111),

Female

Q2		Q3
120	LAKMĒ	117
114	MAYBELLINE NEW YORK	118
109	L'ORÉAL	113
102	Dove	107
81	POND'S SKIN INSTITUTE	78
74	FAE BEAUTY	67

18 - 23 years

Q2		Q3
129	Dove	130
101	LAKMĒ	97
107	L'ORÉAL	104
98	MAYBELLINE NEW YORK	107
90	L'ORÉAL	85
76	FAE BEAUTY	77

24 - 28 years

Q2		Q3
114	Dove	111
111	LAKMĒ	117
101	L'ORÉAL	111
101	MAYBELLINE NEW YORK	99
89	L'ORÉAL	91
83	FAE BEAUTY	71

Index to category average (>110)

Index to category average (<90)

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Brand (Overall)	Dove	Lakme	L'Oreal	Maybelline	Pond's	Fae Beauty
Q2	121	106	104	99	91	79
Q3	120	107	108	103	88	74

No Slipping in Style: Nike, Adidas & Puma Stay Top of Mind

Nike, Adidas, and Puma continue to dominate the fashion radar, reigning as the top three recalled brands in Q3.

Q2



Q3



Brand Index Score - Overall



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 (Overall)	Nike	Adidas	Puma	H&M	Zara	Zudio
Q2	111	105	101	101	92	90
Q3	116	108	100	98	86	92

Nike gains ground, Adidas follows - Zara slips among Gen Z women

Nike(105->115) and Adidas (104>113) strengthen their hold on older Gen Z, Zara declines, losing ground among female (102->91), older GenZ(97-> 82) & in metro cities.



Index to category average (>110)

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Brand (Overall)	Nike	Adidas	Puma	H&M	Zara	Zudio
Q2	111	105	101	101	92	90
Q3	116	108	100	98	86	92

Delivery Leaders: Blinkit, Zepto & Swiggy

Blinkit, Zepto, and Swiggy remain the delivery go-tos, with Blinkit & Swiggy on an upward recall curve



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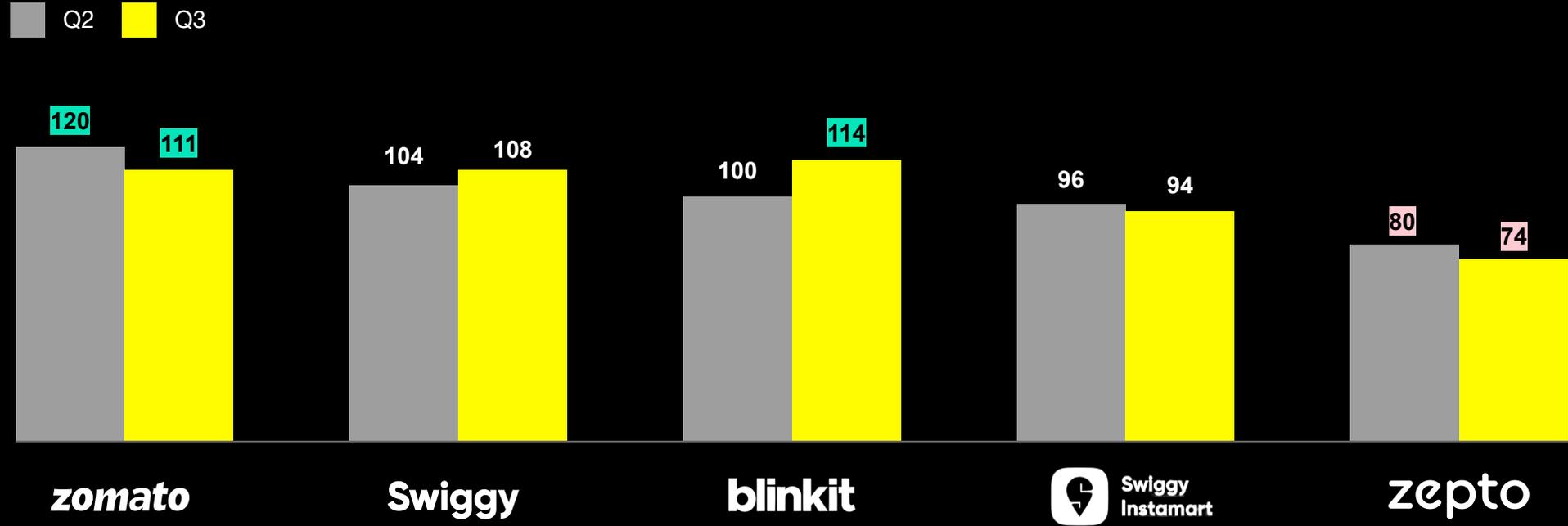
Brand Index Score - Overall



Brand (Overall)	Zomato	Swiggy Food Delivery	Blinkit	Swiggy Instamart	Zepto
Q2	115	104	103	95	82
Q3	113	106	109	97	74

Blinkit gains ground among young Gen Z.

Blinkit stronger among younger GenZ (18-24 YO) consumers (100->114).



Index to category average (>110)

Index to category average (<90)

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Brand (Overall)	Zomato	Swiggy Food Delivery	Blinkit	Swiggy Instamart	Zepto
Q2	115	104	103	95	82
Q3	113	106	109	97	74

Streaming Leaders Stay Unshaken

Netflix shows growth on affinity, hierarchy remains same

Q2



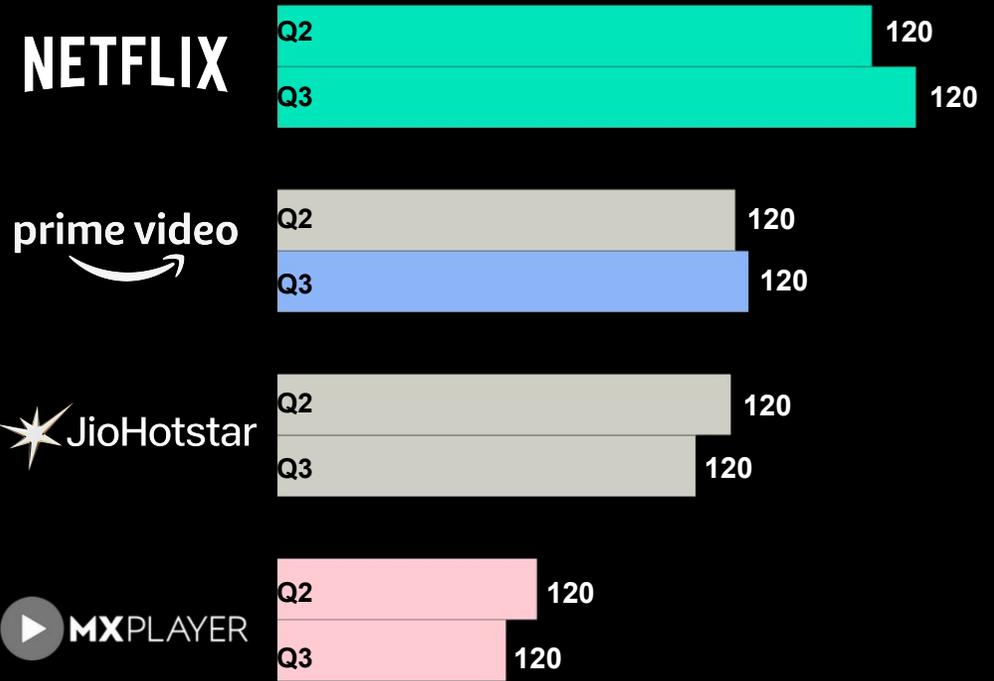
Q3



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 Index Score - Overall



Brand (Overall)	Netflix	Prime Video	JioHotstar	Amazon MX Player
Q2	135	104	103	59
Q3	145	107	95	52

A Universal Favourite: Netflix Tops All Segments

Netflix growing across all genders, age groups, and town classes in Q3. Jio Hotstar primarily declines among Men

	Q2		Q3
Male	134	NETFLIX	144
	109	prime video	98
	105	JioHotstar	110
	52	MXPLAYER	47

	Q2		Q3
18-23 YO	144	NETFLIX	153
	101	prime video	106
	99	JioHotstar	93
	57	MXPLAYER	48

	Q2		Q3
Metro	132	NETFLIX	141
	106	prime video	110
	102	JioHotstar	97
	60	MXPLAYER	52

	Q2		Q3
Female	136	NETFLIX	145
	103	prime video	105
	96	JioHotstar	93
	65	MXPLAYER	57

	Q2		Q3
24-28 YO	128	NETFLIX	137
	106	prime video	109
	106	JioHotstar	98
	60	MXPLAYER	56

	Q2		Q3
Non-Metro	141	NETFLIX	150
	100	prime video	104
	102	JioHotstar	93
	57	MXPLAYER	53

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 (Overall)	Netflix	Prime Video	JioHotstar	Amazon MX Player
Q2	135	104	103	59
Q3	145	107	95	52

Mobile Monarchs: Samsung & Apple Stay on Top

Samsung and Apple continue to lead the pack, remaining the top choices in the mobile space.

Q2



Q3

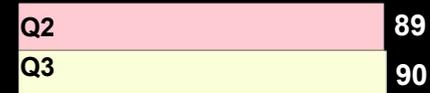


Brand Index Score - Overall

SAMSUNG



ONEPLUS



VIVO



OPPO



Index to category average (>110)

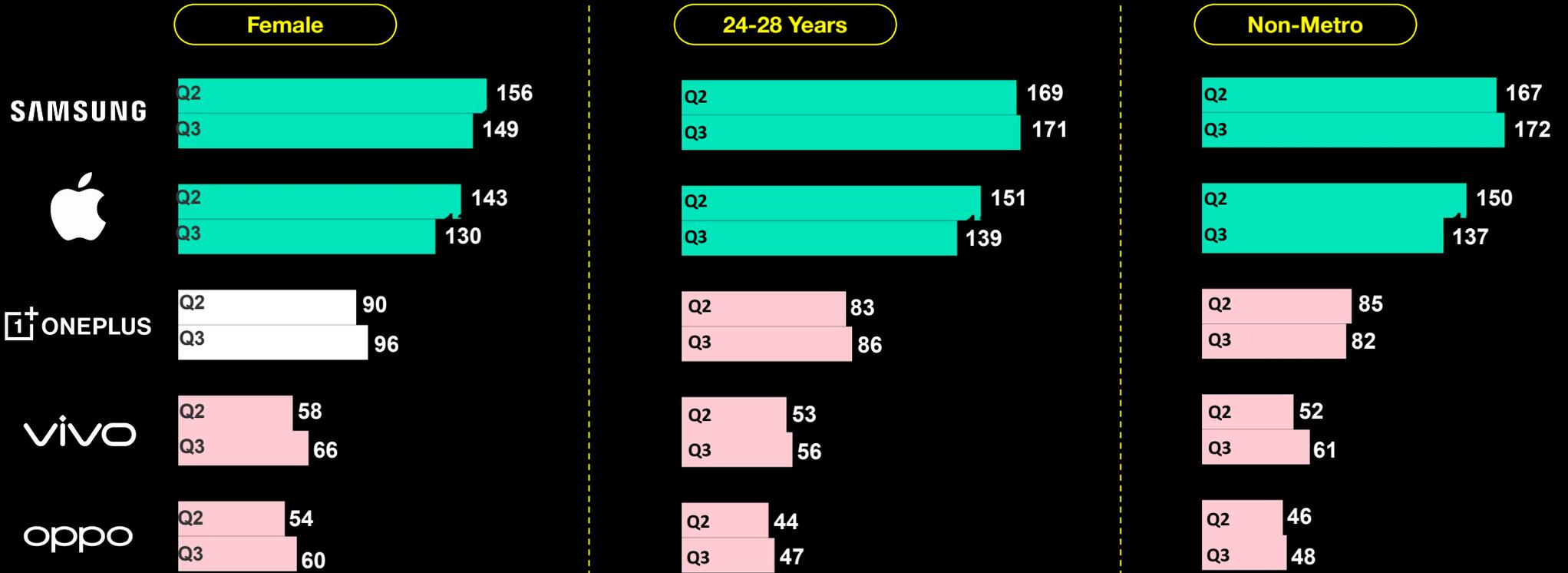
Index to category average (<90)

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 (Overall)	Samsung	Apple	OnePlus	Vivo	Oppo
Q2	158	133	90	65	54
Q3	161	140	89	60	50

Samsung Reigns, Apple Gains

Samsung continues to lead, while Apple has grown among women, younger Gen Z, and non-metro audiences.



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.

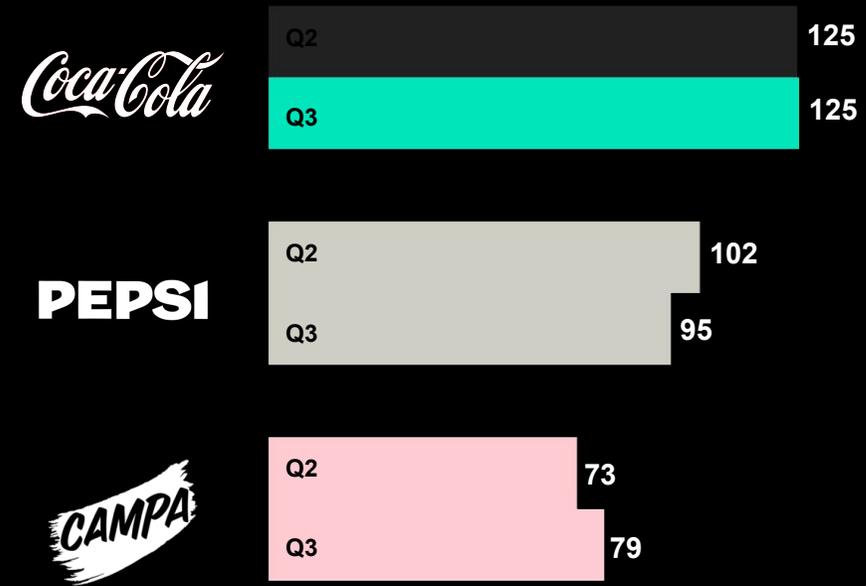
Brand (Overall)	Samsung	Apple	OnePlus	Vivo	Oppo
Q2	158	133	90	65	54
Q3	161	140	89	60	50

Fizz & Familiarity: Coca-Cola, Pepsi, and Sprite Top Beverage Recall

Coca-Cola, Pepsi, and Sprite continue to quench consumer minds, holding the top three spots in beverage recall for Q3.



Brand Index Score - Overall



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.

Gen Z: Hitting the gym & tracking steps, shopping online & styling festive fits



Fit, Balanced, Informed: Gen Z's blueprint for wellbeing



Priority Check: Gen Z puts Health & Fitness first
68% mark it as a top priority.



Health Defined: Fitness leads Gen Z's wellbeing playbook.
7 out of 10 Gen Z link health to being physically fit.



Health GPS: Gen Z navigates with experts & influencers.
Doctors / certified trainers lead at 33%, closely followed by fitness influencers (30%).



Gen Z's Festive Playbook: Digital Deals, Smart Savings, and a Dash of Brand Experimentation



Festive Finds: Discounts Drive Gen Z's Shopping Playbook 34% wait for online/offline discounts. Followed by 26% who track prices via wishlists



Shopping Sources: Gen Z Goes Digital First 80% rely on online apps and websites like Amazon, Flipkart, and Meesho, followed by local markets/malls (47%) and brand websites/apps (43%).



Festive Budgeting: Gen Z Plans Ahead 36% set aside savings throughout the year & 28% start saving just before the festive season



Brand Switching: Festivals Spark Experimentation Among Gen Z 35% switch occasionally for specific categories like clothing or gifts.

Unlocking Gen Z's



Food delivery wins the day

Ordering in is gaining ground, slowly catching up with traditional homemade food.



Digital companions

Gen Z still lives in a world of AI and AR, but the daily spark has dimmed slightly.



Luxury on the radar

Aspiration for global luxury brands is rising, with a third reporting 'much more' interest this quarter.



Wellness wins

Health is a priority, with experts and fitness influencers guiding Gen Z's daily choices making health both aspirational and actionable.



OTT, tech brands show shifts

Netflix gains ground across the GenZ, Apple wins with women



Digital festivities

Festive shopping for Gen Z is digital, deal-driven, and experimental, plans, budgets, and brand switches all follow the scroll.



Thank You!

Q3'25 Findings | Executive Summary