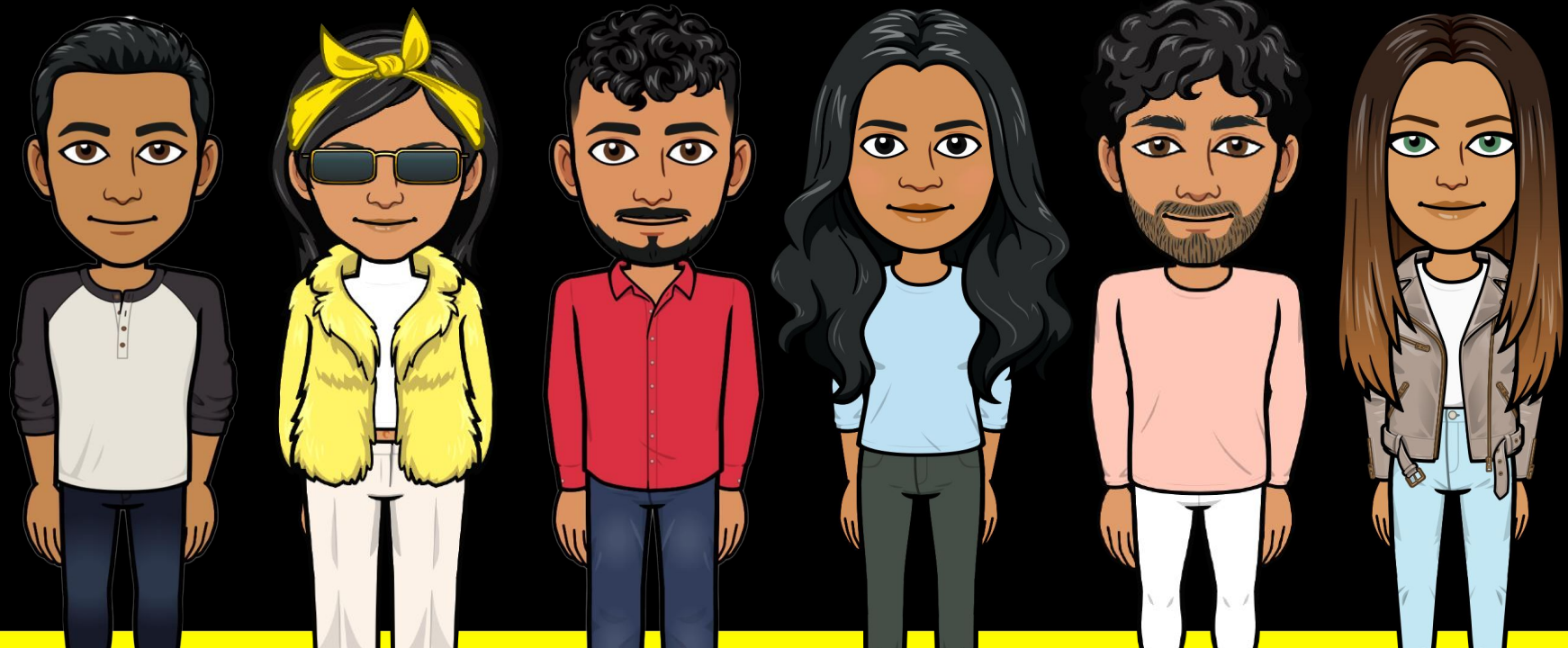


Capturing the Gen Z Mindset
Tracking behaviour | Q4'2025



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 the year 2025 Snapchat Gen Z Index.



Target Group & Sample Size

Quarter	Q1	Q2	Q3	Q4
Among	Gen Z and Millennials	Gen Z	Gen Z	Gen Z
Target Group	<ul style="list-style-type: none"> Gender : Male / Females Age: 18 – 45 years (Gen Z : 18 - 28 years, Millennials: 29 - 45 years) Socio Economic Class: NCCS A Own a personal smartphone Actively engage with social media platforms 	<ul style="list-style-type: none"> Gender : Male / Females Age: 18 – 28 years (Gen Z) Socio Economic Class: NCCS A Own a personal smartphone Actively engage with social media platforms 	<ul style="list-style-type: none"> Gender : Male / Females Age: 18 – 28 years (Gen Z) Socio Economic Class: NCCS A Own a personal smartphone Actively engage with social media platforms 	<ul style="list-style-type: none"> Gender : Male / Females Age: 18 – 28 years (Gen Z) Socio Economic Class: NCCS A Own a personal smartphone Actively engage with social media platforms
Methodology	CAWI	CAWI	CAWI	CAWI
Centres	<ul style="list-style-type: none"> Metros: Delhi NCR, Mumbai, Chennai, Bengaluru, Hyderabad, Pune, Ahmedabad, Kolkata T1 Towns: Jaipur, Lucknow, Guwahati, Indore, Kochi, Chandigarh, Patna, Nagpur 	<ul style="list-style-type: none"> Metros: Delhi NCR, Mumbai, Chennai, Bengaluru, Hyderabad, Pune, Ahmedabad, Kolkata T1 Towns: Jaipur, Lucknow, Guwahati, Indore, Kochi, Chandigarh, Patna, Nagpur 	<ul style="list-style-type: none"> Metros: Delhi NCR, Mumbai, Chennai, Bengaluru, Hyderabad, Pune, Ahmedabad, Kolkata T1 Towns: Jaipur, Lucknow, Guwahati, Indore, Kochi, Chandigarh, Patna, Nagpur 	<ul style="list-style-type: none"> Metros: Delhi NCR, Mumbai, Chennai, Bengaluru, Hyderabad, Pune, Ahmedabad, Kolkata T1 Towns: Jaipur, Lucknow, Guwahati, Indore, Kochi, Chandigarh, Patna, Nagpur, Madurai, Durgapur, Dehradun, Gwalior.
Sample Achieved	708 (493 Gen Z and 215 Millennials)	743	741	1534

What are we covering today?

1

Inside GenZ

Exploring their mindsets and behaviors across key life segments.

2

GenZ Brand Report Card (Yearly)

Understanding their affinity with brands across different categories.



MYTH: Gen Z are all the same

REALITY: They are NOT

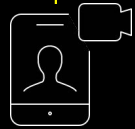
There is a Z that says: Love me, want me, see me	<>	And there is a Z that says: I believe i can
Z are finding new careers they are proud of, forsaking 'dream job' concept	<>	but they are also worried about employment and money
Own identity is important	<>	but families (with boundaries) are important too...
Z want trusted brands	<>	but their trust comes from peers not heritage
Virtual and social is their natural environment...	<>	but authenticity is crucial



REAL is the new currency



What does being 'real' mean for Gen Z



Unfiltered recommendations win trust

Gen Z trust recommendations that feel lived-in and honest, not scripted like an ad.



Meaning-led brands hit different

They are choosing brands that feel personal to them + their people, not just big names.



Relatability builds trust

Gen Z trust voices that look/talk like them - not polished, distant personas.



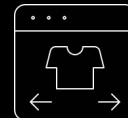
Niche > mainstream, if it feels more 'me'

They are happy to try niche/less-known brands when they feel more "me" than mass.



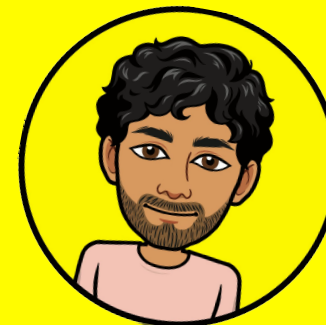
Believable beats polished

Celeb ≠ credibility; they decide based on what feels believable.



Try it - then trust it

Gen Z uses technology such as AR try-ons/demos to decide - because authenticity is what you can test, not what you're told.



Understanding Gen Z : Mindsets & Behaviours

2025 Recap



Meet Gen Z: The 2025 Edition



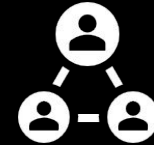
**Desi brands
= real pride**



**Brands
must vibe**



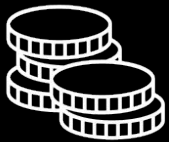
**Only buy if
it's a steal**



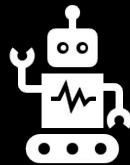
**Safe space = my
inner circle**



**Mental wellness is
non-negotiable**



**Focused on
creating wealth**



**Tech for hacks,
not just likes**



**Real experience >
scripted promos**



**Relatable is the
new influencer**



**Flexibility is my
work style**



Gen Z is emotionally aware, firm on boundaries

Mental health talk = normal

I can openly discuss mental health with my friends/family - support system > stigma.

Social media is my window to exchange opinions

I use social media to give/get opinions - it's how I process stuff.

I'm most me around my people

My daily life is for my inner circle - that's where it feels safe and honest.



Shop smart, shop loud: Gen Z's rules for the cart

Deal hunting is a lifestyle

Hunting for the best offers is a lifestyle – they search for best deals always.

I just don't buy names, I buy meaning

Personal meaning > big names.

Only real influencers matter

Trust recommendations from creators who keep it honest, not just anyone with followers.

If it feels like "me," it wins

Open to trying smaller/upcoming brands when they feel more "me" than mass.

Desi brand pride

I take pride in buying Indian origin brands.



Secure the bag: Smarter money, no stress

Save first - spend later

I'm disciplined about putting money aside before I start "treating myself.

FIRE is the endgame

Financial independence isn't a dream - it's the plan.

Secure the bag (for real)

I'm focused on building long-term wealth, future me needs options, not anxiety.

Steady gains > risky trends

I'll pick stable options (FDs/savings + mutual funds/stocks) over gambling on hype.



Work-life remix: Gen Z flexes on their own terms

Flexibility is my work style

I want to work where, when, and how I want.

Pay matters - but peace matters too

I'm choosing jobs where money and work-life balance both get a vote.

Work is just one tab

My job's important, but it's not my whole browser.

Base: Q2: Gen Z - 743 | Q3: Gen Z - 741 | Q4: Gen Z - 1534



Gen Z uses tech to simplify life, not just chase likes

AI is my tech buddy to getting stuff done

I use AI like a buddy for studying, work tasks, and quick problem-solving - brain boost, minus the stress.

AR is how I make content pop - instantly

Filters, lenses, effects... AR is my easy mode for creating shareable content without overthinking it.

This isn't a trend, it's the new normal

AI + AR becoming part of everyday life - shopping, learning, creating, even events - like default features.

Base: Q2: Gen Z - 743 | Q3: Gen Z - 741 | Q4: Gen Z - 1534



Gen Z career mindset: designing a future with options & growth

Education as an upgrade

I'm treating education like an upgrade pack - because more learning = more doors unlocked













1 career path? Nah! They are multi-route

Some jump straight into work, some do a master's first, some go deep into a skill - but the goal is being future-ready.

Corporate, startup, or sarkari - chooses the vibe that fits

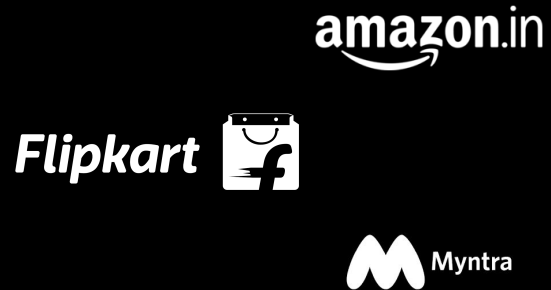
Stability, growth, independence, and meaning all matter - I'll pick the lane that matches my life goals, not society's script.

Brands Wrapped

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

Brand Recap (1/2)

E-Commerce:



Amazon stays at the top.
Flipkart + Myntra are the clear next tier.

SKEWS: Amazon is loved by both genders |
Flipkart lean more male + Non metro |
Myntra is the women favourite.

VIBE: Amazon = category leader |
Myntra = 'her vibe' + 'non-metro rise'

Fashion:



Nike leads the category energy; Adidas, H&M
and Puma stays in the top mix.

SKEWS: Nike over-indexes with men | Adidas
is steady with men.

VIBE: Nike + "main character energy" for
guys | Adidas + classic cool, no noise.

Beauty:



Dove is the clear #1, L'Oreal + Lakmé sit in
the next tier, with Maybelline close.

SKEWS: Dove connects more with men |
Lakmé, Loreal and maybelline skew female |
Lakmé is more popular among order Gen Z

VIBE: Dove runs the throne | Lakmé + Loreal
+ Maybelline are her glam besties

Brand Recap (2/2)

Food/Grocery Delivery:

zomato **blinkit**
Swiggy

Zomato leads; Swiggy and Blinkit stays close.

SKEWS: Blinkit is popular among Gen Z's residing in non metro cities.

VIBE: Zomato wins hearts | Blinkit wins urgency

OTT: **NETFLIX**

prime video
 

Netflix dominates; Prime Video + JioHotstar are the steady alternates.

SKEWS: No sharp divide across demographics | Jio Hotstar buzzed among men only during IPL.

VIBE: "Netflix isn't an app, it's culture."

Beverage:


PEPSI 

Coca-Cola leads; Pepsi follows; Campa Cola underperforms.

SKEWS: Not strongly split by demographics - pattern is broadly consistent.

VIBE: "Coke is the OG. Pepsi is fine. Campa is niche."

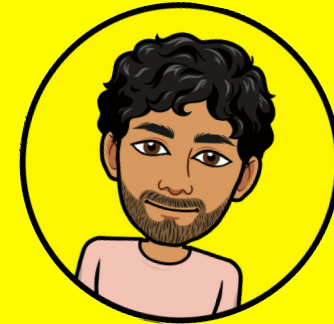
Mobile:

SAMSUNG 

Samsung + Apple are clearly on top; others struggle to feel "cool".

SKEWS: Broadly stable across demographics - no standout skews.

VIBE: Samsung runs the streets | Apple runs the aesthetics






What Brands must do to win

Unlocking Gen Z in 2026



Gen Z is still value-obsessed, but increasingly meaning-led; discovery is creator-powered

What Gen Z is telling us (reality check)

	Value remains non-negotiable: Deal-hunting is extremely high.
	Meaning is rising: Gen Z increasingly chooses brands that feel personally relevant, not just functional.
	Discovery is creator-led: Micro-creators who feel real and honest drive credibility more than celebrities.
	Core behaviors are consistent: Value-seeking + creator-led discovery + loyalty to category leaders.

What brands must do to win

1	Value + Meaning, together Make affordability obvious AND connect to identity/personal relevance.
2	Win via micro-creators Build trust with credible micro voices; show real use-cases, not ads.
3	Scroll-first storytelling 3-second clarity: visual, punchy, authentic, minimal copy.
4	Utility-led AR/AI Use AR/AI to simplify choice (try, find, personalize) - - not as a gimmick.
5	Plug into key tensions Enable “better everyday life”: wellness, balance, convenience, confidence.



Thank You!