

EXPONENTIAL **Z**

RISING TO THE CHALLENGE and REDEFINING WHAT'S TO COME

In partnership with The Harris Poll, Meredith presents their second annual exclusive national survey on the modern woman, focusing on emerging trends among America's youngest cohort - Gen Z





METHODOLOGY

This survey was conducted online within the United States by The Harris Poll on behalf of Meredith from June 15-23, 2020, among 2,707 women ages 16 and older, with a specific focus Gen Z women ages 16-24 (n=1,201).

To explore this generation of women, which is our country's most racially and ethnically diverse to date¹, several key audiences were included in the research:

Black Gen Z women (n=368)

Latina Gen Z women (n=383)

Asian Gen Z women (n=162)

1st/2nd Gen American Gen Z women (n=624)

LGBTQ Gen Z women (n=301)

We also conducted qualitative diaries and interviews with 6 Gen Z women, ranging from those in high school to recent college graduates. For more information on the data, contact: Britta Cleveland, SVP, Research Solutions at britta.cleveland@meredith.com.

MILLENNIALS OPENED THE LENS, GEN Z IS SHARPENING THE FOCUS

With the oldest Millennials entering their forties this year, we wanted to take a look at the next generation - Gen Z - to understand how these young women see the world. While Millennials were the first digital natives, defined by Facebook, iPhones, the 2008 recession, Obama's presidency, and the rise of the gig economy, **Gen Z are the "always on" natives being defined by TikTok, social influencers, remote learning, Covid-19, Trump's presidency, and non-stop digital disruption.**

In many ways, the attitudes and behaviors that characterize Millennials persist within Gen Z, such as the desire to find meaningful work, create a better work-life balance, and become financially independent. Both groups are choosing to shrug off the pressure of traditional adult life like settling down in a traditional marriage, having kids, and even holding down a 9 to 5 job, in exchange for a life defined on their own terms.

Gen Z is also forging their own path in many ways, sharpening the focus on what further defines brand preference and relevancy. Zs are more likely to feel racially discriminated against, more likely to boycott a brand, and more accepting of "cancel culture" in general than Millennials. **They are demanding inclusivity that goes beyond representation, moving to celebration of all types of people, relationships, and lifestyles.** As the generation that has most profoundly felt the impacts of COVID-19, Zs view this time as a societal "wake up call" and are looking forward to reimagining "the new normal."



SIMILARITIES BETWEEN MILLENNIALS AND GEN Z



Redefining traditional career paths and family structures



Focusing on finding meaningful work



Prioritizing financial independence



Share a similar holistic view of brands where they call out brands for unethical behavior and make brand decisions based on their ethical practices



Share similar relationships with their moms and view them as their best friends, role models, and life coaches



They also exchange advice with their moms on similar topics like technology, fashion, and entertainment



They are both aware of mental health issues noting it is okay to not be okay

DIFFERENCES BETWEEN MILLENNIALS AND GEN Z



Most impacted by COVID-19, saying their lives have been “cancelled”



Pushing the boundaries on inclusivity, seeking brands that celebrate all types of people and “cancelling” those that don’t meet their standards



More likely to say they’ve experienced racial discrimination and to break up with brands for racial discrimination



More likely to describe themselves as adventurous, ambitious, and creative



More likely to feel they are idealists who want to start a career right now over starting a family



The most influenced by social media influencers and ads when it comes to finding out about new products and services



More aware of their own privilege in society today

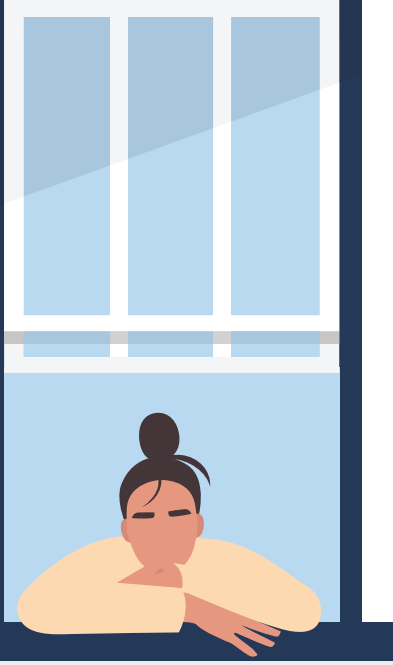


They lead in wanting brands to be more inclusive

CULTURAL CONTEXT:

AS LIFE IS PUT ON PAUSE TODAY, GEN Z WOMEN ARE EXCITED TO BUILD THEIR TOMORROW

On the cusp of coming-of-age, this generation of women ranging in age from 18 to 24 has been completely uprooted by the events of 2020. Almost a third of Zs say they have had to “put their life plans on hold” due to COVID-19 (32%) and cite the pandemic’s top emotional impact as making them “feel like their lives have been cancelled.” At the same time, these young women are adapting to more disruption than other generations across all aspects of their lives, from school to work to their living situation – and yet they still **feel immense pressure to “have their lives together by the time they are 30” (78%).**



In this pressure cooker where societal disruption meets high personal expectations, a quarter of Gen Z women admit recent events have impacted their mental health. Many report experiencing increased anxiety and a decreased ability to focus as a result of the pandemic, with these impacts being felt more strongly among LGBTQ+ women of this generation.

Despite present challenges, the majority are grateful for the opportunity this chapter has offered to pause and reflect. Leading all other generations of women, 3 in 4 Zs say, **“COVID-19 has given me time to get to know myself and how I deal with difficult situations” (76%).** Many are more in touch with their values as consumers, saying they are now more appreciative of what they have and more in tune with “needs” versus “wants.” Stability is another heightened priority for many, with 6 in 10 Zs “considering a more traditional career path after COVID” (59%).

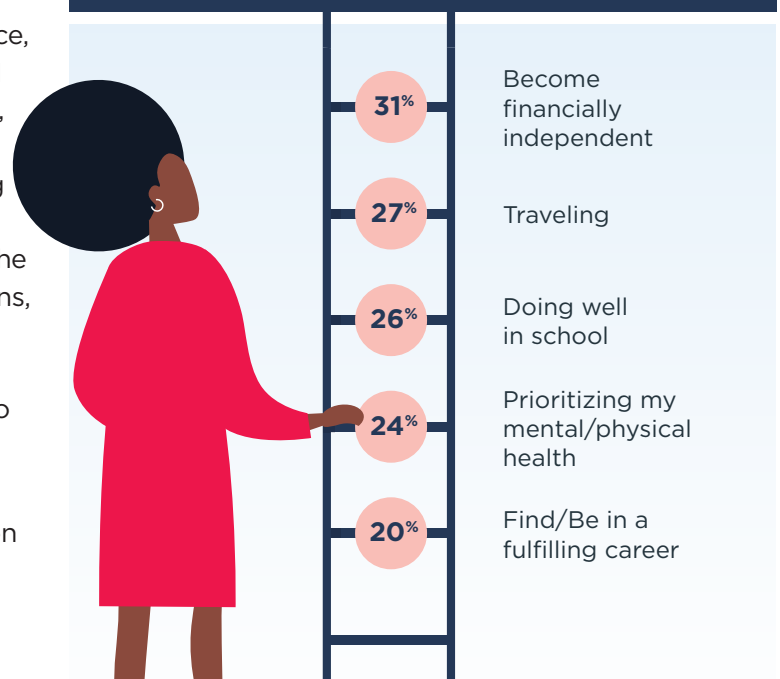
Grounded in pragmatism and driven by independence, Zs are prioritizing financial freedom as their top goal for next year. In fact, although they are the youngest, Z women are the most financially ambitious out of any generation, prioritizing achievements like buying a house and building a career, over relationship milestones, such as having a partner or children by the time they are 30. Alongside these practical aspirations, Zs also cite honesty, creativity and passion among their top personal values, ultimately balancing their identity as “creative realists.” Zs are also very likely to characterize themselves as adventurous and ambitious.

Zs are also using this pause as fuel for their fight on social change. The vast majority are “angry about

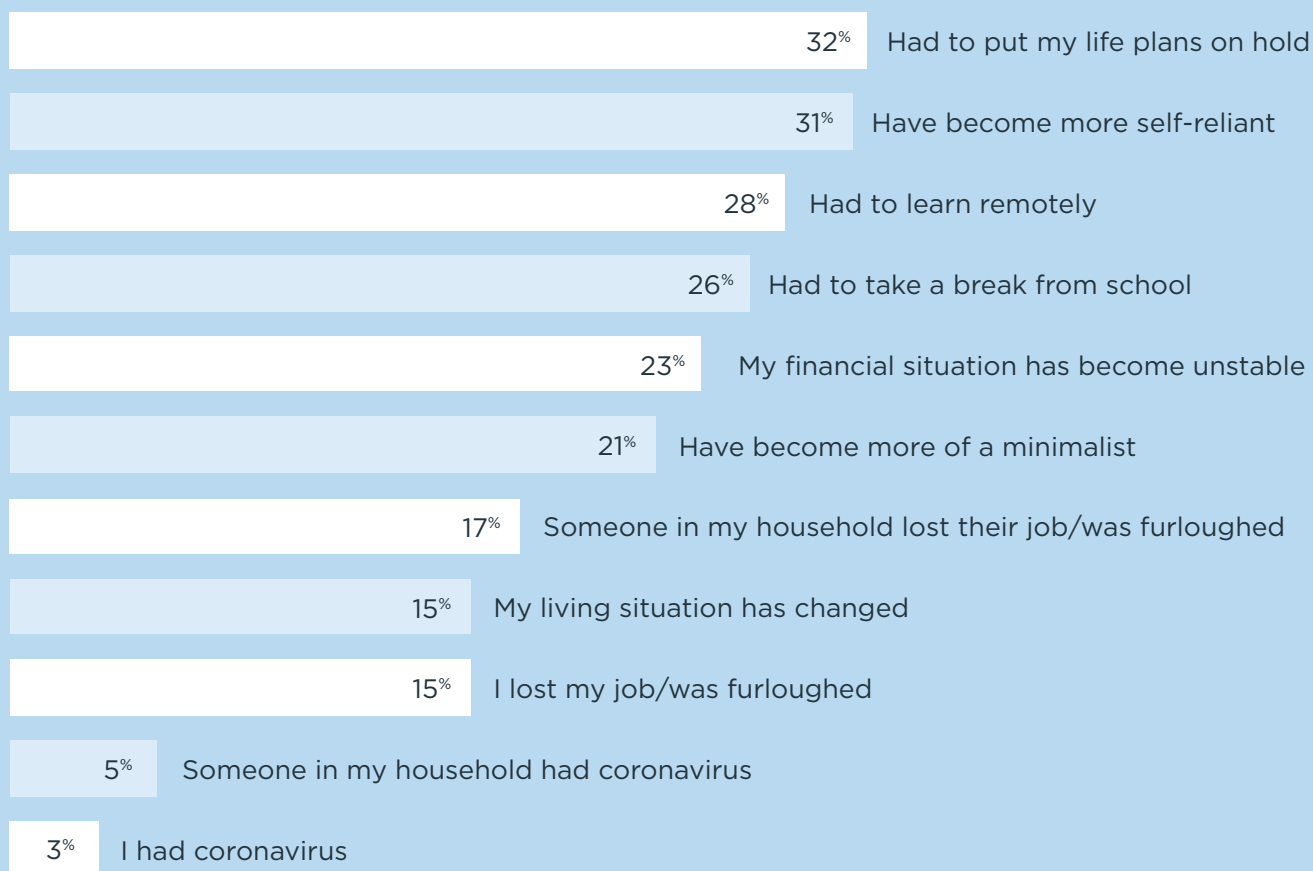
the way COVID-19 has been handled by the federal government” (74%) and believe **“COVID-19 is a wake-up call in society to make real policy change” (78%).** Identifying as “willing to fight the good fight” and “likely to question authority,” Zs are activating for social justice. 82% say, “racial equality is more important to our country now than ever before” (76%), while 7 in 10 agree that “COVID-19 has shone a spotlight on racial injustice in this country”

Ultimately, they acknowledge that this is a watershed moment for their generation, with the vast majority agreeing that “COVID-19 will have a long-term impact on their worldview” (77%). Yet Zs are not passively sitting back to weather this storm; they are optimistic about the future and looking forward to actively constructing their reality, **saying they are excited to “build a new normal.”**

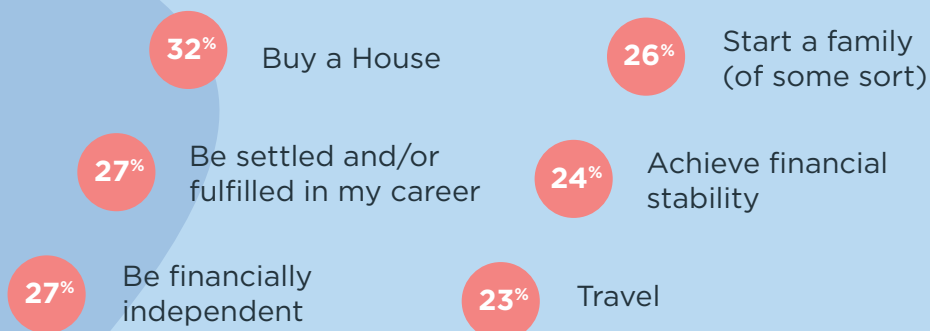
WHAT ARE YOUR TOP 3 PERSONAL GOALS FOR 2021?



HOW HAS THE CORONAVIRUS OUTBREAK IMPACTED YOUR LIFE?



FILL IN THE BLANK IN THE FOLLOWING SENTENCE:
“BY THE TIME I’M 30, I WANT TO _____.”



WORK & CAREER:

Zs ARE “OVER” OVERWORK CULTURE

Gen Z women are hyper aware of burnout culture, after seeing the impact it had on their parents. They are very likely to say they witnessed working parents being “overworked by their employer” (65%) and, as a result, they are making an “active effort to find more balance in their life” (74%). The pandemic has also tempered their outlook, with 3 in 4 saying they “are focusing on more than just work because they have learned there is more to life after COVID-19” (74%).

Instead, Zs are looking to craft a fluid future that prioritizes quality of life over titles and money. The majority say they do not believe they will be defined by their work (57%, versus 43% who think work will be core to their identity), with quality of life defining success instead of monetary earnings (73%). Zs anticipate a flexible career path that is driven by their own passions, saying they are **“confident they will find success in pursuing jobs that matter to them instead of following traditional success pathways”** (75%) and that they “anticipate redefining their career frequently as they grow and evolve as people” (74%). The majority of Gen Z women even say they prefer to work a freelance job for flexible hours (58%), over a traditional 9-5 job (42%).

“I am tired of over-work culture and seeing it glorified for people to be constantly busy.”

- GEN Z WOMAN, 24



WELLBEING:

MIND OVER MUSCLE IS THE NEW ADVANTAGE

Even before Covid-19, Gen Z women have been ringing the alarm on anxiety and mental health. Last year we reported that over 6 in 10 said, “the way things are going I don’t know how I’m going to cope with the stress if it continues at this pace” outpacing all other generations of women. Growing up in a state of constant competitive school pressure, social media perfection and polarized hate-filled politics, these young women have hit their breaking points before even entering the workforce.

But this isn’t exactly bad news, as Zs are revolutionizing mental health, making it a signal of youth culture couture, with all other generations following suit. The new signals of cool involve being aware of your mental health, throwing taboos out the window, and acknowledging life is more like a rollercoaster than a linear happy ride. For example, the vast majority of Gen Z women acknowledge that “it’s okay to not be okay” (80%), and that “it’s better to be honest about anxiety than to pretend it doesn’t exist” (79%). Recent events have boosted Zs’ candor, with two-thirds agreeing, “COVID-19 has helped make mental health issues more of a normal topic of conversation” (67%).



Ultimately, Zs believe this work is the key to unlocking a better future for all, asserting that “if people spent as much time on their mental health as the time they spent in the gym, the world would be a better place” (73%). 7 in 10 also believe mental health should be prioritized over physical health. They believe it will be foundational to their own success, with 79% agreeing **“being self-aware enough to deal with mental health issues will help me get ahead in the world.”**

“The greatest contribution of this generation [Gen Z] is normalizing self-care and the reality that people will feel irrational sometimes.”

- GEN Z WOMAN, 21



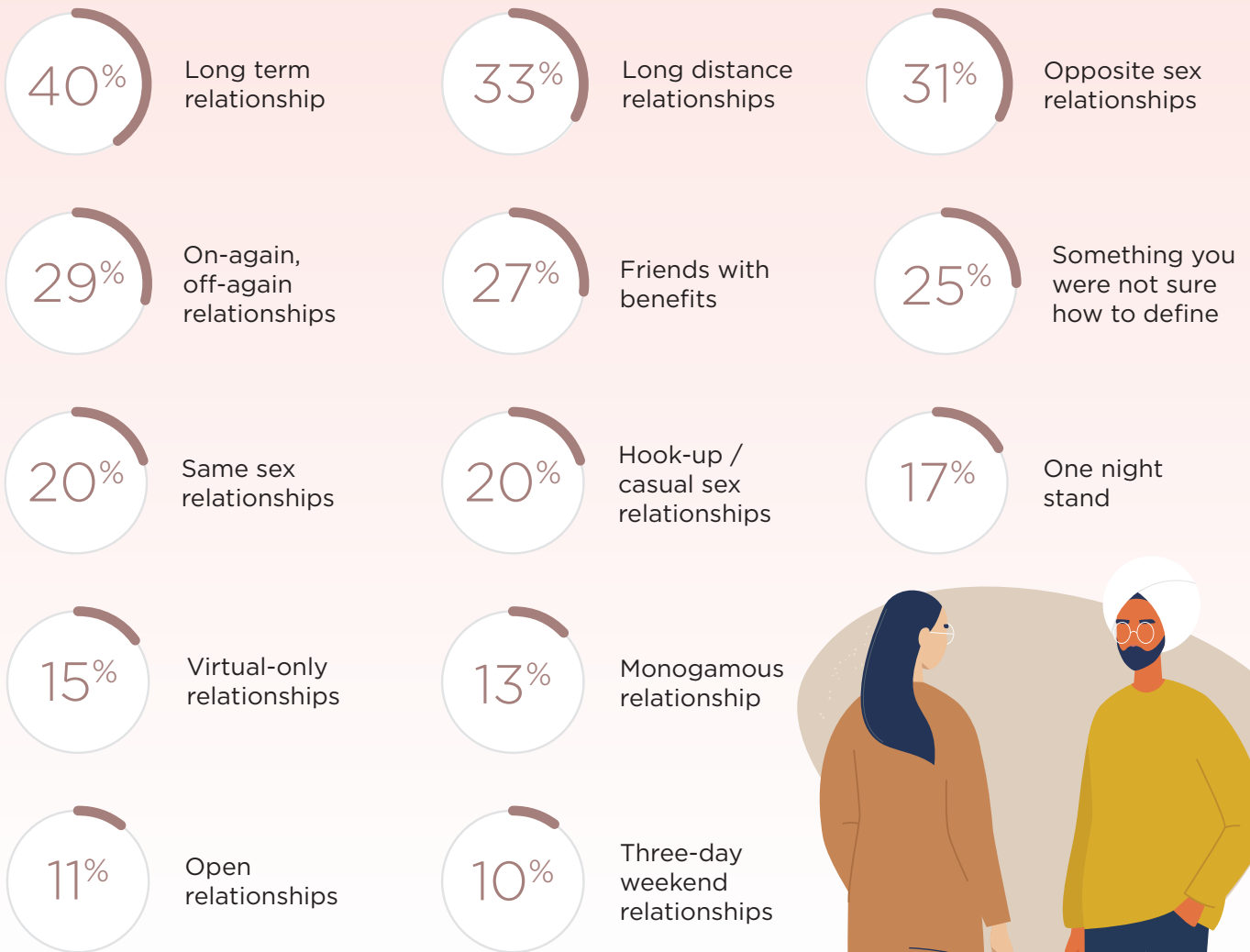
RELATIONSHIP STATUS: HAPPILY UNDEFINED

Given this generation’s independence, it isn’t surprising that traditional family plans are taking a back seat for Zs. The majority agree that starting their career is more important to them than starting a family (58%,) and that they are “more interested in their own life than finding the perfect partner” (66%). Less than half say they feel pressure to settle down with a single life partner (47%) or have children (40%), and fewer than half value “marriage over living together” (45%).

Instead, Gen Z women are rejecting judgment, celebrating diversity, and embracing fluidity in all of their relationships. Believing that “people are too judgmental of others’ relationships” (78%), Zs instead assert that **“all different types of families should be celebrated, not just traditional partnerships and marriages”** (77%).

Zs today are dating on a fluid spectrum, leaning into same sex, open, undefined, and casual relationships. As the generation that is most open to new experiences and comfortable with ambiguity, 3 in 4 Zs believe that **“dating today is more on a spectrum than it has been in the past”** (75%) and this approach “should be celebrated, not criticized” (56%).

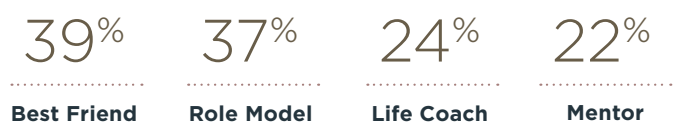
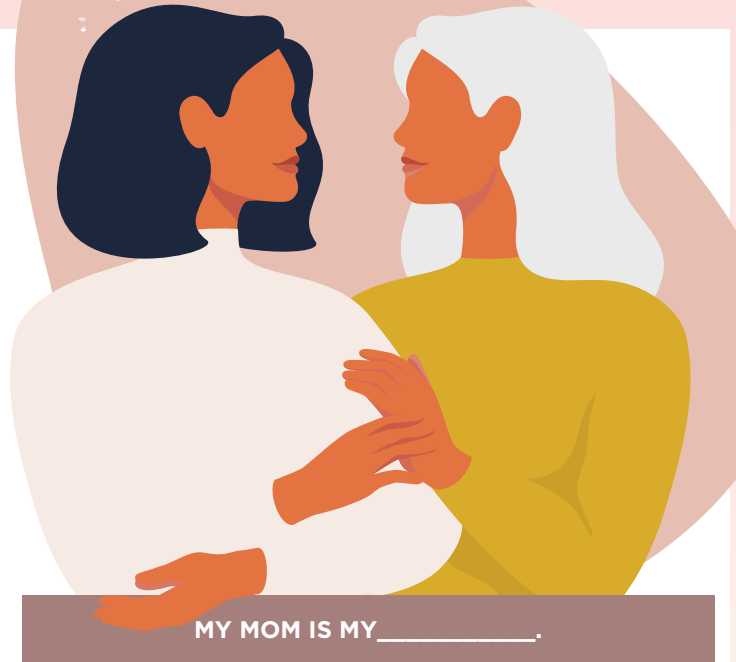
HAVE YOU HAD ANY OF THE FOLLOWING TYPES OF ROMANTIC RELATIONSHIPS?



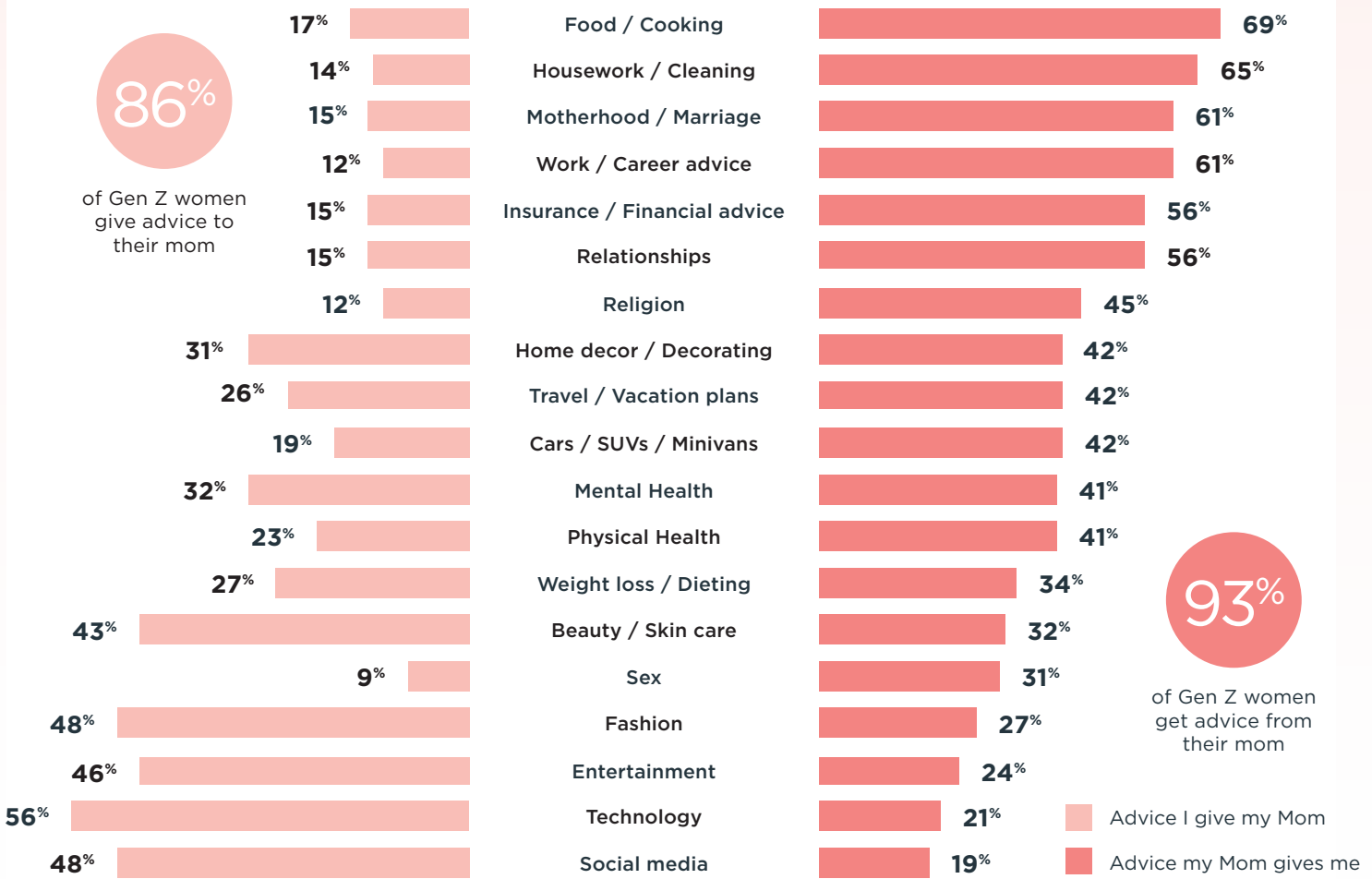
FAMILY VALUES:

MENTORED BY THEIR MAMAS

Gen Z women enjoy close relationships with their Gen X mothers, with around 1 in 4 describing their mom as a “life coach” and “mentor.” They are also embracing a two-way dialogue with their moms, trading advice across a variety of topics, which means that, in addition to their over \$140 billion in purchasing power, Zs are also influencing Gen X’s buying behavior as well. Specifically, Gen Z women are giving advice to their moms and influencing their buying behavior when it comes to technology, entertainment, fashion, and beauty.



DO/DID YOU AND YOUR MOM TRADE ADVICE ABOUT ANY OF THE FOLLOWING?





SOCIAL MEDIA:

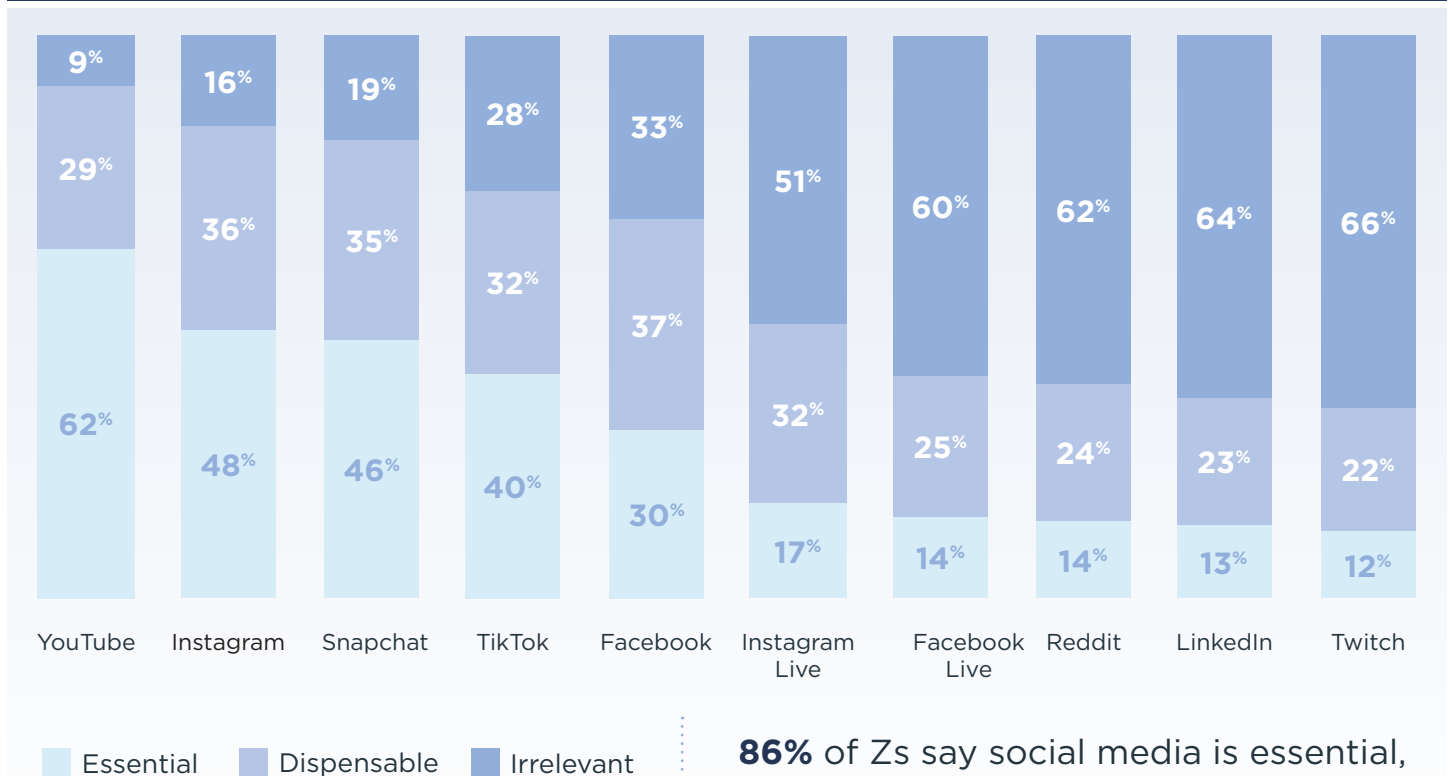
OVER IN A TIKTOK MINUTE

Caught between their penchant for honesty and addicting “highlight reels,” Zs have a complicated relationship with social media. 3 in 4 admit “it’s easy to get caught up in the ‘highlight reel’ of social media, where you only see the positive aspects of people’s lives,” (77%), while many also say “social media makes them feel like they are in a fishbowl” (61%). Zs acknowledge these negative impacts, saying they are over the ‘Instagram aesthetic’ that projects a certain lifestyle” (70%) and that they are working to **“curb their social media addiction” (56%)**.

Gen Z women also have a love-hate relationship with social media platforms. While they set the trends with new platforms such as TikTok (that Millennials follow) and classify YouTube, Instagram, Snapchat and Spotify as “essential” tools they couldn’t live without, Zs lead all generations in

saying many of these platforms are “dispensable,” and they would switch if something better came along. In fact, 3 in 4 are willing to try out new social media platforms that provide interesting or entertaining content (78%), with their top genres of interest being beauty, fashion, and mental health.

HOW WOULD YOU DESCRIBE YOUR RELATIONSHIP WITH THE FOLLOWING TECHNOLOGY OR MEDIA PLATFORMS?



86% of Zs say social media is essential, yet **83%** also say it is dispensable.



WHICH OF THE FOLLOWING TYPES OF CONTENT DO YOU SEEK OUT ON A REGULAR BASIS?



45%
Beauty



42%
Fashion



36%
Cooking /
Recipes



27%
Health /
Wellness

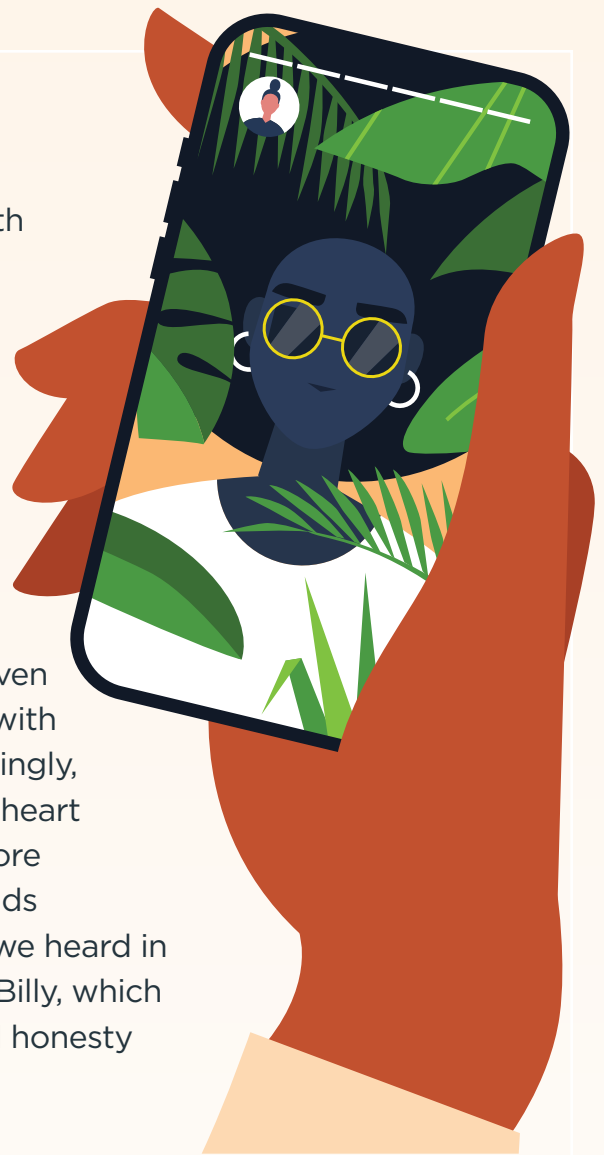


27%
Entertainment
News

RELATIONSHIP WITH BRANDS:

REFLECTION BRANDS DRIVE LOVE

If brands had to become digital natives to connect with Millennials, then they should be prepared to become inclusive social beings to win over Zs. Connecting with Zs goes beyond jumping on the latest social media platform, but instead requires an intrinsic value assessment of how brands are showing up in the world. From social media, Zs have become intrinsically savvy marketers, with more than half **“actively thinking about managing their personal brand on social media”** (54%). As a result, they place a high bar for brands, connecting most with social driven brands that accurately reflect their lifestyle and align with their values of creativity, honesty and passion. Accordingly, Z women believe it’s social influencers who are at the heart of today’s brands, with 67% saying “influencers are more important for showcasing brands today, than the brands themselves.” Examples of Z women’s favorite brands we heard in our research are Fenty, Glossier, Outdoor Voices, and Billy, which isn’t surprising given the idealization of inclusivity and honesty these brands represent.



69%

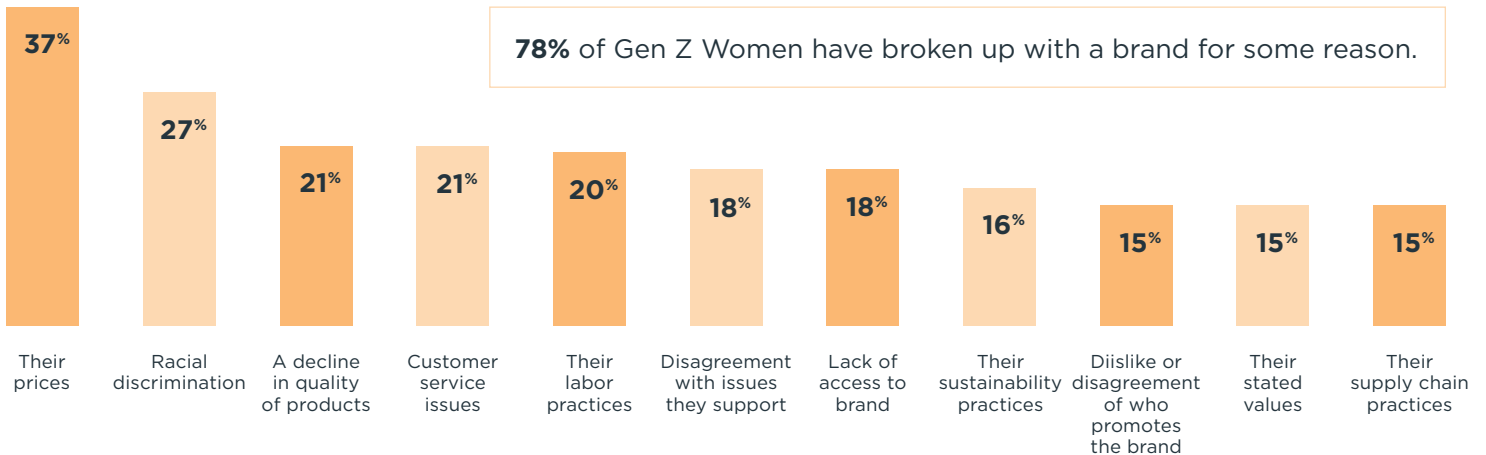
of Gen Z women **prefer to use brands that meet a variety of needs and represent an overall lifestyle**, vs. those that focus on a single niche very well (31%).

As America’s most diverse generation, Zs are prioritizing representation and inclusivity that matches their own reality. More than Millennials, or any generation of women, Zs identify with brands that prioritize inclusivity and challenge beauty and body standards. This is likely because they themselves do not feel seen or reflected by most brands today (61%), and assert that **“many brands feel like they think of diversity as a ‘checkbox,’ not a real-world reflection of their audience”** (73%). Instead, Zs want to see more women of color embraced in companies’ services and products, not just their marketing (76%) – demonstrating a more authentic representation.

“I want to shop brands that say, ‘we built these brands for the audience.’”

- GEN Z WOMAN, 21

HAVE YOU “BROKEN UP” WITH A BRAND, OR STOPPED USING IT, FOR ANY OF THE FOLLOWING REASONS?



Similar to their relationship preferences, Zs would like to see **“more non-traditional lifestyles and families celebrated by brands”** (74%). They are much more likely than non-Gen Z women to prioritize brands that “celebrate all types of people” and “are raw and honest.”

After witnessing years of social media ‘click’ activism, Gen Z women are tired of brands that tout their values but don’t follow them through the supply chain. In fact, Gen Z are more likely than their Millennial counterparts to “break up” with a brand over a brand’s “labor practices.” And Zs have a sixth sense for superficial value badging on social media, with the majority saying, “social change does not actually occur on social media, it occurs with action in the real world” (73%) and **“if a brand has to tell me their values, instead of showing them, they’re not authentic enough”** (64%).

Half say they have “called out a brand that behaved in a way they believed was unethical” (50%), while 69% say “cancel culture has finally allowed consumers to call out brands and individuals for bad behavior.” **Zs are also “breaking up” with brands (78%), especially for issues surrounding racial discrimination (27%).**

Ultimately, Zs set a high bar for brands, just like they do for themselves - and they are not shy about opting into those that reflect their lifestyle or calling out those that do not align with their values. In order to earn Zs’ respect, marketers must build brands that genuinely reflect their audience from the ground up, prioritizing honesty, creativity, and inclusivity above all else.

THINKING ABOUT YOUR FAVORITE BRANDS, WHICH ARE THE REASONS YOU LIKE THEM?



WHICH OF THE FOLLOWING, IF ANY, BEST DESCRIBES THE BRANDS YOU LOVE MOST?



To schedule a presentation of
the full report or to get customized
insights that relate to your brand,
please contact:

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