

unleashing

GEN Z

a self-made generation

Research Report April 2020

Digital Experience
Research Center

We wanted to understand how Gen Zs are

WHY GEN Z?

We only know the surface about Generation Z in view of the fundamental fact that they were **born between years 1995 and 2010** and that they started working in a multi-generational workforce and thus having their **first earnings**.

They are currently between 10-25 years old, **living in an Era of Changes and Challenges**, discovering everything, defining their identities and experiencing of the deepest moments in their life. These represent **remarkable and cognitive moments to be remembered in their whole life**.

In fact, the Reminiscence bump¹ states that the greatest number of memories a person of 70 years old has is when we are between 15 to 25 years old. So, **unforgettable memories** are about to happen to Gen Z youngsters!

1: <https://bit.ly/33EHXWz>

HOW WE DO IT?

We approached them in a natural way; **this generation is not afraid of anything** and they are open to discuss any topic. We wanted to know about their lifestyle, motivations, frustrations and deep desires. So, **we gave them the word to share their intimacy** with us. They sent us videos about their temples of memories (their rooms) through **home tours** hosted by themselves.

We conducted immersive observations in their preferred public spaces and one-on-one **ethnographic interviews** with them to uncover their deepest needs and pain points.

*Reports about Gen Z's made at NTT Data' Research Center about their relationship with banking and retail sectors have been taken into account.
Banking: <https://bit.ly/2U8hJJ4> / Retail: <https://bit.ly/2UmtMkO>*

WE STARTED REMOVING LAYERS

As we were delving into their lives, we were discovering behaviors that have caught our attention because they were **challenging the current status quo**.

Digital natives yes, but lovers of physical objects attached with their experiences, activists of social causes but consumerists, humor as core value but critical thinkers and more confident in **exploring multiple identities**.

They seem to be contradictory, however they want to see everything with their eyes and their mates' to become **the most authentic generation ever**.

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VS. MILLENNIALS?

#

We are Gen Z.

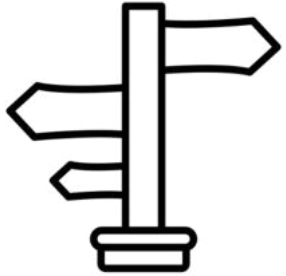
"Social apps are fine to know what's going on around you and your friends, but it's not comparable to having your friends around you"

Regina, 17

Meet our main characters.

GEN Z ARE **UNTAGGED**, THEY ARE BUILDING **GAME-CHANGING EXPERIENCES**, THEY RELATE TO THEIR PEERS BY **CLANDESTINE TRIBES**, INTERACTING THROUGH **SMARTPHONES**; BUT THEY DEEPLY NEED A **TRUSTFUL GUIDANCE** AND DESPITE BEING DIGITAL, THEY CAN'T LIVE WITHOUT THEIR **TANGIBLE TREASURES**, SO THEY CAN LOOK TO THE FUTURE AS **OWN-DESTINY SEEKERS**.

Context



UNCERTAINTY IN A BETA WORLD

Living in a post-crisis era, **parents can't offer them a predefined path** like Millennials' parents did with them. They are conscious about it therefore they **focus on studying as much as they can and develop a career path based on their interests**, without knowing what is coming next.



FAST-PACED AND HYPER- CONNECTED WORLD

Having grown up in a digital world, they are accustomed to having an **instant access to information**. They are able to learn anything, reach at everyone with a click of button and **follow their peers' life in real-time**. They are becoming a fully autonomous generation.



THE ART OF THE EPHEMERAL

Enjoying so busy days and thus **lack of time**, they develop an **ability to quickly filter out** what they care about and discard the rest. They **communicate through ephemeral messages**, but they value **keeping** their best experiences' **physical memories**.



SOCIAL REVOLUTION

Giving no answers to their future and having a lack of respect for citizens and climate change **has generated a conscious mindset in this generation** towards personal care (body positivity, mental health), tolerance (human rights, LGBTQ) and planet's sustainability (climate change activism).



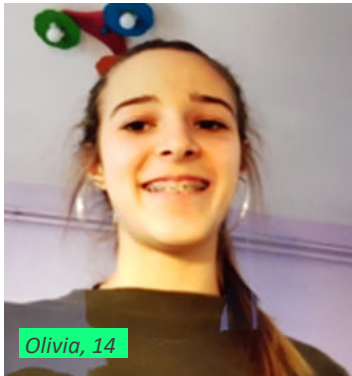
CREATIVE FREEDOM

Leveraging the possibilities that **digital tools** offer, Gen Z youngsters have been given the opportunity to **express themselves as never seen before**. They can seamlessly link up their physical and digital world, edit and instantly share their whole life just with a click.

NTT Data meet Gen Z

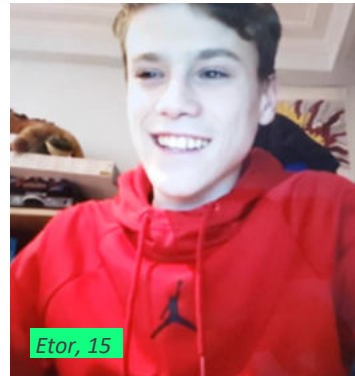
Both young and old Gen Zs have the pursue of independence, the enlightenment of future uncertainty and money concerns as their main leitmotivs.

Despite having no income, young Gen Zs are beginning to have greater independence from their parents, start going out with their peers and doing a lot of sports. Their main concerns are to think about **what their future is going to be** and therefore they specifically focus on studying to have the best possible options to choose from when they decide what to do.



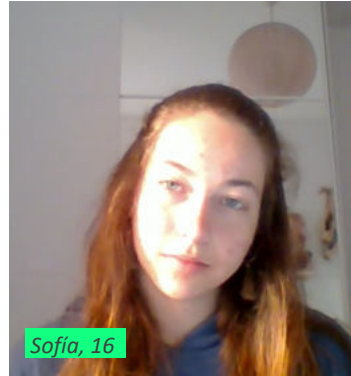
Olivia, 14

Olivia, 14, she wants to be **scriptwriter** and loves taking photographs of their friends. She's a **digital social activist rookie** who is conscious about her age but wants to participate in more protests. Maybe "more" protests.



Etor, 15

Etor, 15, spends all day doing **sports** with his friends, loves the Real Sociedad football team and wants to become a sports journalist. He has **daily a 30-mins access** to his smartphone.



Sofia, 16

Sofía's, 16, days are full of activities. She dances ballet and has a **close group of friends** supporting each other and **helping her to not think about others' opinions**.



Valeria, 16

Valeria, 16, who engages in doing social studies, is a professional tennis player. Her **current ambition is to win several tournaments to be able get a scholarship that gives an opportunity to her to study in a university in the USA**.



Regina, 17

Regina, 17, feels that **social networks are good** when it comes to learn and get informed about the topics she's interested in, **but they avoid the human touch and the meaning of being together**.

NTT Data meet Gen Z

Older Gen Zs are already in higher education and most of them based on their interests and **have developed a greater concern about money issues**, how they will contribute to their family's economy, how they will earn a living, and **most of them already have income from small jobs**. Their greatest desire is **to be completely independent** from their parents and to **have experiences in shared flats abroad or start working** in what they are studying.



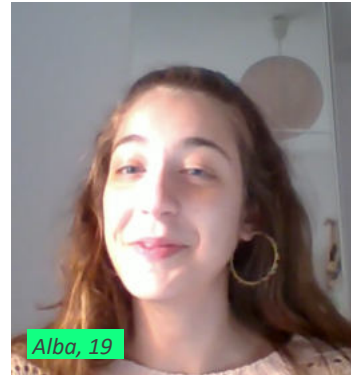
Guillem, 18

Guillem, 18, studying Data Engineering, told us about his eye-opening Interrail trip and he pointed **the influence his uncle has had on the most important decisions in his life**.



Martina, 18

Martina, 18, **lived a year in the USA where she learned how to take care of herself**. She is currently **studying business administration online** and working in a study abroad agency.



Alba, 19

Alba, 19, who is emotional and sensitive, is studying to become a nurse. **She discovered life at 16 when she started to party and meet new people**. In her room she proudly has all her ballet slippers hanging.



Pol, 21

Pol, 21, **changed his career in an attempt to reconcile his hobbies with what he is studying**. His greatest wish is to live abroad alone, work on what he has studied and learn English.



Oriol, 22

Oriol, 22, had a **hard time getting his parents to let him study Sports Management** but he got it and meanwhile he is working teaching kids and refereeing handball to save for a trip with their friends.

These are 7 dimensions that describe Gen Z's behavior.

01 | UNTAGGED.

THEY DON'T WANT TO BE LABELLED.

02 | GAME-CHANGING EXPERIENCES.

MOMENTS OF LIFE THAT ARE SHAPING THEIR IDENTITY.

03 | CLANDESTINE TRIBES.

THEY DEVELOP RELATIONSHIPS THROUGH MICRO DIGITAL COMMUNITIES.

04 | SMARTPHONE CRUSH.

THE NEW SYMBOL OF MATURITY, INDEPENDENCE AND RESPONSIBILITY.

05 | TRUSTFUL GUIDANCE.

THEY LOOK FOR CLOSE PEOPLE TO HELP THEM GROW.

06 | TANGIBLE TREASURES.

THEY AVOID THE EPHEMERAL OF THE DIGITAL BY OWNING MEANINGFUL OBJECTS.

07 | OWN-DESTINY SEEKERS.

NO ONE BUT THEM CAN CHOOSE WHAT THEY WANT TO BE IN THE FUTURE.

INDICACIONES PARA DISEÑADORES

#1 Untagged

INSIGHT

Digital world is the playground where they show their fluid behaviour, shape their identity and express their authenticity avoiding being labelled.

SHAPING THEIR IDENTITY

Young people between 15 and 25 y.o. **have many labels because they are continually trying out everything**, discovering what their hobbies and passions are. They are living through a time of change towards maturity (at home, new friends, starting college, first jobs, relationships), **they are busy all day with studies**, extracurricular classes (English, reviewing subjects), occasional jobs (coaching, children's lessons, events), sports and their social life.

Along this path to maturity, they listen to all kinds of opinions, **are open to listening to all points of view and then make choices**. Generation Z youngsters are students, soccer fans, dancers, digital natives, photographers, friends, children, writers, video editors, creatives, and **they can be everything they want to be**.

Sports until 18-19 y.o. are very important in their lives, but then the responsibilities of studying, working etc. take up time and they are "forced" to choose or create new routines if their interest in physical exercise continues (they join gyms, more informal sports, train children, etc.).

"The change of school was a turning point, I was a shy, nervous person, but it was a moment of deciding that I could meet new people, that I would later choose who to stay with. I decided to be more outgoing"

Mariona, 18

"I started listening to more music in secondary, now a lot of pop in English, trap, reggaeton and also when I finish my homework I sometimes listen to slow piano music to get relaxed"

Inés, 19

"I used to play federated football but I don't have time anymore, and at least I train younger kids now"

Miquel, 18

Las frases resaltadas se pueden utilizar como recurso fuera del texto, como frase a destacar en mayor tamaño, como en las revistas o blogs.

Los quotes, la mayoría se relacionan con los textos, con lo que si los ponéis juntos, ayudarán al lector a entender mejor el texto descriptivo.

#1

Untagged

They don't want to be labelled.



"I'm always doing things (ballet, English, teaching girls, learning new choreographies on YouTube, homework, friends), I never stop"

Sofía, 16

#1 Untagged

INSIGHT

Digital world is the playground where they show their active behaviour, define their identity and express their authenticity avoiding being labelled.

SHAPING THEIR IDENTITY

Young people between 10 and 25 years old **have many labels because they are trying out everything and discovering** what their hobbies and passions are. They live through a time of change towards maturity (at home, new friends, starting a college, first jobs, relationships), **they are busy with their studies**, extracurricular classes (English, reviewing subjects), occasional jobs (coaching, children's lessons, events), sports and social life.

Along this path to maturity, they listen to all kinds of opinions, **are open to listening to all points of view and then make their own choices**. Generation Z youngsters are students, soccer fans, dancers, digital natives, photographers, friends, children, writers, video editors, creatives, and **they can be everything they want to be**.

Sports activities until 18 and 19 years old are of a huge importance in their lives. However, the responsibilities of studying and working makes them decrease their sports routine. They have to create new routines if their interest in physical exercise continues (they join gyms, more informal sports, train children, etc.).

"The change of school was a turning point, I was a shy, nervous person, but it was a moment of deciding that I could meet new people, that I would later choose who to stay with. I decided to be more outgoing"

Martina, 18

"I started listening to more music in secondary, now I listen to pop music in English, trap, reggaeton and also when I finish my homework I sometimes listen to slow piano music to get relaxed"

Alba, 19

"I used to play federated football but I don't have time anymore, and at least I train younger kids now"

Guillem, 18

#1 Untagged

DIGITAL PLAYGROUND

The digital world offers for them the opportunity to have an **access to everything they need**, then they choose their own content, their way of informing and communicating, learn new skills, listen to whoever they want and when they want; **briefly there are no any restrictions as in the physical world. They develop their personality through the social media networks**, they are digital from morning to night and it is the medium where they express as they are, including their multiple faces (the ideal and the true) and reflection in the real world.

DECODING GEN Z'S VALUES

Authenticity is their core value and they demonstrate it in social networks. They see themselves as spontaneous and passionate, who can be trusted and with a high degree of commitment to:

- **Relationships:** They are **empathetic** with their friends; they put themselves in each other's shoes; they form close groups that protect each other. The family is seen by them a basic pillar assuring a protection, a space for growth, trust and security. Their parents support them in their decisions.
- **Education:** They are **aware of** that fact that they need to study a lot to keep all possible options open to them so that they can choose what they want to do.
- **Attitudes towards life:** They are **ambitious**; they want to be independent and know that to do so they have to work and earn money which is a very present concern in their lives. They are also **tolerant** and like sharing their values with their peers.

“The values I have are also demonstrated in the social media, I am just as I am”
Guillem, 18

“My family is my pillar, my parents have always supported me in my decisions, even when I changed university career”
Pol, 21

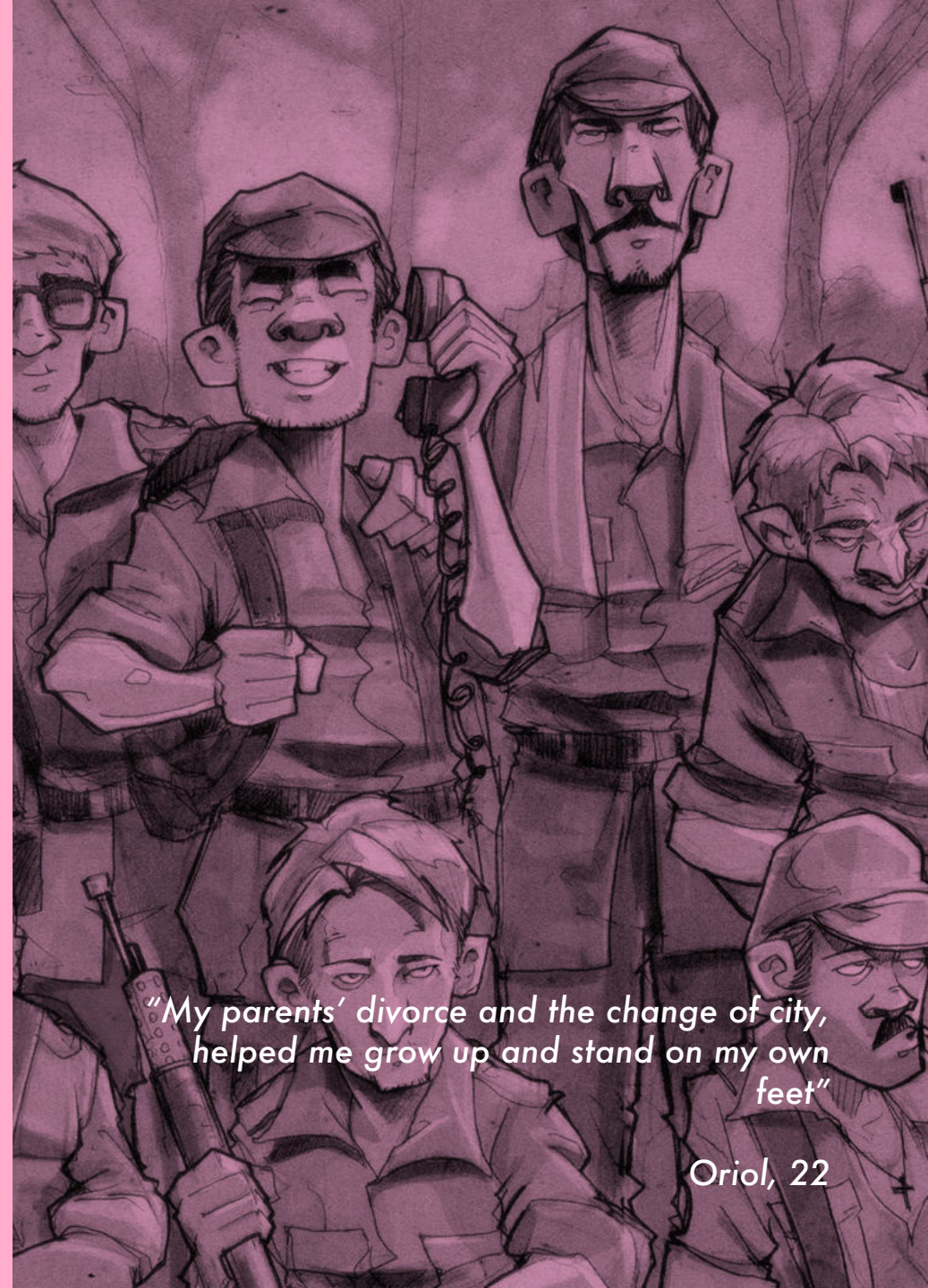
“My dream is to go to the US on a tennis scholarship to study at the university”
Valeria, 16

“Now that it's going to be Women's Day, I'll be uploading stories to try to make people aware of what's going on”
Olivia, 14

#2

Game-changing Experiences

Moments of life that are shaping their identity.



*"My parents' divorce and the change of city,
helped me grow up and stand on my own
feet"*

Oriol, 22

#2 Game-changing Experiences

INSIGHT

They experience multitude of unique moments that make them grow at different speeds.

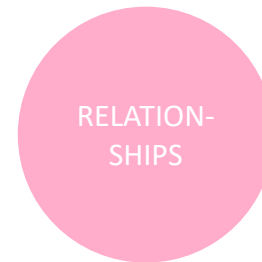
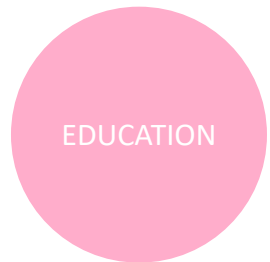
CHANGES THAT LEAD TO GROWTH

Most of the young people have not yet left their home, but **they are increasingly demanding greater autonomy and becoming more independent.** They are spending more time away from home, more time with their friends and the protection of their parents is not the same as when they were children. **They are beginning to face the world alone.**

FACING CHANGE

The most remembered moments are situations that have impacted them, either positively or negatively.

Negative events (such as repeating a school year, the breakup of the family and change of location), even though it is traumatic, **help them grow up more quickly**, but leave a residue in their past. With maturity they start realizing that **facing change is a necessity in life not to sink.** Age is not important but to arrive with the support and the necessary confidence to face and overcome the problems. For our Gen Z youngsters these are the moments that impacted their life:



“I spend less and less time at home; I stay for lunch at school, I give ballet classes to girls, I go out to parties, I have to study, I don’t have time”

Sofía, 16

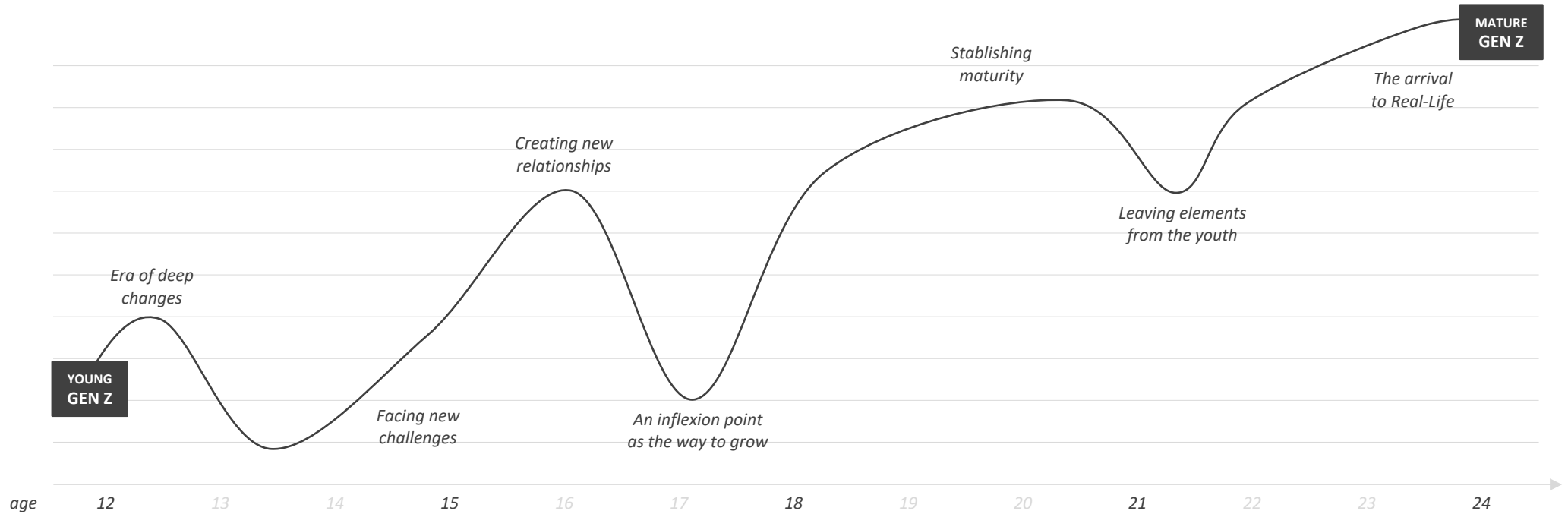
“When I repeated 2nd year of high school all my friends and boyfriend went away, I felt alone, I had a very bad time”

Alba, 19

GEN Z YOUNGSTERS' JOURNEY TO MATURITY

Generic reconstruction of Gen Zs game-changing experiences through their last years based on ethnographies done.

MATURITY LINE



- High impact life moment !
- Positive life experience ▲
- Negative memory ▼

HUMAN VALUES

both positives and negatives

#OPEN_UP_PERSPECTIVES	#LONELINESS	#HELPLESS	#CHALLENGE	#GROWTH	#DECEPTION	#UNCERTAINTY	#INDEPENDENCE	#RESPON-SABILITY	#RESIGNATION	#FREEDOM	#LEARNING	#SELF-REALIZATION
	#FEAR	#DISCOVERY	#SELF-STEEM	#EXPERIMENTATION	#INSPIRATION	#RESPONSIBILITY	#AUTONOMY		#SADNESS	#MATURITY	#EXPERIENCES	

TRAVELING & EVENTS

punctual but more memorable

TRAVELING WITH PARENTS	CHANGE OF CITY	ROBBERY AT HOME		STUDY ABROAD						MUSIC FESTIVAL	TRAVELING WITH FRIENDS
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EDUCATION

high impact from 16 to 19

			CHANGE OF SCHOOL		REPEAT COURSE	CAREER CHOICE	BEGINNING OF UNIVERSITY				
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ACHIEVEMENTS

small accomplishments

		FIRST SPORT MATCH	SPORT TRANSFER			UNIVERSITY ACCESS EXAM		FIRST JOB	LEAVE SPORTS			OFFICIAL JOB
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RELATIONSHIPS

Long-lasting and punctual

	PARENTS DIVORCE	FAMILIAR ADVICES	NEW FRIENDS	NEW FRIENDS	FAMILIAR ADVICES				DEATH OF FAMILIAR	FAMILIAR ADVICES	
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#2 Game-changing Experiences

THE STAGES OF EDUCATION SHAKE GEN Z'S LIFE BETWEEN 16-19 YEARS OLD

- ! **Change of school:** The emotional impact is high (higher the older they get), as it brings new realities to their life such as leaving from their friends, meeting with new ones and facing new challenges. **It is, however, in their hands to decide how to face this new reality.**
- ▲ **Career choice:** It means a full of uncertainty, in this case they need more information, **people to guide them to minimize doubts** and convince their parents that what they have chosen has a future because they are aware that it will be a key moment that will decide their life. They take it very seriously and with responsibility.
- ▼ **Repeat course:** In this case, self-esteem drops and if it happens in the last year it creates **a traumatic experience** as the people grown up with go to university and **are left alone.**
- ▲ **University access exam:** It is a moment with a **great responsibility**, and it serves to check how they face the pressure, showing themselves and those close to them what they are worth.
- ! **Beginning of university:** This stage is faced with **greater independence, the role of parents dissipates**, the **discovery of new experiences begins**, and the autonomy and responsibility of making their own decisions becomes stronger.
- ▲ **Career change:** It is seen a complicated and bold decision, as well as **hard to admit that they have made a mistake**, however if this decision gives opportunities to develop their career it will have been worth it.

“The step to the institute was very big, meeting a lot of people, going out to party, going out with boys, making a group of friends. I started arguing with my parents too often”

Martina, 18

“What matters is whether you really like and are passionate about what you're going to study and what will then become your job”

Alba, 19

#2 Game-changing Experiences

TRIPS BROADEN PERSPECTIVES

- ▲ **Traveling with parents:** Access to travel is greater than before, although young people need to save for it. Generation Z is used to travelling with their parents anywhere and this **opens up perspectives** and makes them more tolerant and open-minded.
- ▲ **Traveling with friends:** The next step comes when they start traveling with their friends, taking long routes like the famous Interrail where **they learn many values and come back more mature** and with lots of memories in their backpacks.
- ! **Study abroad:** The most extreme level is when they travel abroad alone to study. This is a time of learning, **individual growth** and adapting to new culture and languages. It's needed a great effort to enjoy the adventure.
- ▼ **Change of city:** When parents decide to change city, **the impact in their children lives is huge**, and they may feel alone at the beginning, leaving behind all their friends and love ones.

IMPACTFUL EVENTS

- ▲ **Music festivals and weekend parties** are multisensory experiences that keep in the memory of youngsters forever. **Family events** like the communion, **special birthdays, sport events, surgeries** (broken dreams because of a knee injury) and **manifestations** are also unforgettable, but not so game-changing as educational and travelling experiences. Inside events, **negative ones can happen** like a robbery at home, repeating school year, parent's divorce, etc.

"The interrail trip gave me a greater perspective of the world, I will always remember what I experienced with my friends"

Guillem, 18

"When I was 7 I spent 6 months between Egypt, Qatar and Greece because of my father's work. I was going to school there, meeting new people and new cultures. I will never forget that experience full of personal growth and learning"

Regina, 17

"When we were robbed in the new house I felt helpless and very angry, they had entered my privacy and had taken all my memories"

Oriol, 18

#2 Game-changing Experiences

PERSONAL **ACHIEVEMENTS** ARE REMEMBERED WITH PRIDE

! Achievements that bring autonomy and responsibility such as getting the **first job** and those related to **financial management** such as receiving the **first salary**, first purchases with their savings and first current account.

▲ **Sports achievements** are happening over the years and **are seen as a part of most young people**, being a central **▼** part of their lives until they reach 18 years old where it becomes more complicated to combine studies and sports.

- The moment when they **discover their passion** for sports (like Valeria discovering tennis at the age of 5 in or Guillem going with his grandfather to a football match at the age of 7).
- The **first training session** for the selection of players and the **first official match** are remembered with emotion due to the nervous moment that it entails.
- The **increase of self-esteem and illusion** that generates when another team wants to sign them because of your conditions.
- **Medals and trophies** won in school competitions, races and contests **are proudly displayed in the youngsters' rooms** as a sign of their skills and abilities.
- **Leave playing team or federated sports** because not having too much time.
- Sport related **surgeries or long-term injuries**.

“I found my first job at Zara and it was a big responsibility. It's an important moment because it's only me, my parents aren't behind me, there's no one else but me”

Martina, 18

“My first training was a special moment, I remember because I was very nervous and there, I met my best friends of today”

Guillem, 18

#2 Game-changing Experiences

LONG-LASTING RELATIONSHIPS

Over the years young people create relationships that will last for a longer or shorter period, bringing them a great joy and not so great and **special people who will accompany them at some point in their lives**.

▲ **First friendships**, first loves and break ups, **family references** that influence character and help define values, as well as the **death** of a family member, love disillusionments, **toxic relationships** with friends, break ups with couples, etc. impact the lives of young people.

“My grandmother's death affected me a lot because I was very close to her and she was the one who gave me the best advices”
Pol, 21

#3

Clandestine Tribes

They develop relationships through micro-communities.



"I don't need to show how good or bad I am through social media, sharing it privately with my family and friends is enough"

Pol, 21

#3 Clandestine Tribes

INSIGHT

Gen Z's show their true face in small groups where they feel free and confident to talk about any issue.

CONTEXT OF MISTRUST

This generation **does not trust the world**, as they are aware that their Millennial brothers and sisters were promised something that was not fulfilled. The amount of information they receive **has helped them develop critical thinking and become experts at filtering messages**. They are open to listen to all points of view and then make their own decisions.

MICRO-COMMUNITIES

They trust their friends and their environment; the **Fake News does not matter to them** because they move in closed and trusted circles. **Instagram is seen as a digital newspaper for them** where they can find out real-time (stories functionality) about their friends' lives. **They form small communities around their interests**, where they freely express their thinking. They have many trusted micro-communities.

“Some of my school mates have hooked up online, but I don't trust meeting someone online and dating him, I prefer to meet boys in person first”

Sofía, 16

“Before, there were people who didn't fit in so well, but we've managed to be a very united group of friends, who always support each other and are very confident in telling anything”

Olivia, 14

“I have a best friends group on Instagram where we talked about football and we send each other memes and team news”

Etor, 15

#3 Clandestine Tribes

INSTAGRAM DOUBLE-FACED PROFILES

Their behaviour on Instagram shows that they have 2 faces. One is public and the other is more personal and introspective, although both profiles are private. **Most of the interviewees have 2 Instagram profiles**, the public profile which can be viewed by “everyone” (previously accepted ones) and the profile only shared with best friends.

- **Public:** The profile where all their friends and other people are; the place where they upload their best and most edited snapshots or "**show off photos**", which are called in their words.
- **Personal:** In this profile **they have only a few friends** and they hang spontaneous photos, of their day to day and reflect on life and their worries, giving themselves a constant support among all. **This is where they feel more comfortable and open to talk about any personal issue and thoughts about their world.**

NORMALIZED PRIVACY

They are aware of the danger of showing their public life on social media. They have seen what has happened to people older than them, i.e. celebrity and local leaks. **They've normalized privacy and it's no effort for them to behave in such a way**, therefore they only upload photos of themselves without attaching their surroundings. Their parents simply advise them not to upload photos of their younger relatives, photos in swimsuits, or **make their social media accounts private.**

"I have a secondary account which is where I publish my most personal photos, without editing, and I explain things that have happened to me that day to my best friends"

Olivia, 14

"I'm aware that I don't have to upload photos of my little cousins, show my intimacy or what I'm doing, but it's obvious"

Alba, 19

"When I create my first Instagram account my mother put a condition on me, that the account has to be private, and when I created the second account I kept it, it seemed the best"

Sofía, 16

#3 Clandestine Tribes

DIGITAL NOMADS WHO HAVE FOUND THEIR PLACE ON INSTAGRAM

They have tried all social networks. They have seen how their parents stayed on Facebook, they have tried the social media platform where they felt most comfortable (e.g. Snapchat for the ephemeral messages) and those that could express their way of being (Musically, formerly TikTok). From there, they have created their own micro-communities, they have abandoned Snapchat and TikTok because they have grown and **they now seek to centralize all their activities through Instagram as their interactive and personal newspaper.** They read news from Instagram (trustworthy friend-related network) and Twitter (to extend info about their interest). This is the perception of current social apps and their use:

- INSTAGRAM:** Centralized consumption, greater convenience, view and upload stories, multiple accounts, real-time access to news and friends.
- WHATSAPP:** Daily use to connect with parents and make plans with friends, they have many groups.
- YOUTUBE:** Mainly for entertainment, for listening to influencers about their hobbies.
- TWITTER:** Use to spread information about their interests and read in real time about news and TV programs.
- SNAPCHAT:** They abandoned this social network when Instagram brings out the Stories feature, now they don't use it or only with acquaintance.
- TIKTOK:** It does not fit with the current Generation Z, it is for a younger target, but although they do not use it some content is seen through Instagram.

"I had 70 friends in Snapchat with the fire of 150 days continuously sending photos, and I lost my smartphone and stayed offline 2 days and everything disappeared, so I got angry and stopped using it"

Valeria, 16

"I used to chat through Snapchat but when Instagram brought out the stories feature, we all moved to Instagram"

Oriol, 22

"I left Snapchat before everyone else left it because it didn't give me what I needed, Instagram is more practical, it has everything"

Martina, 18

#4

Smartphone Crush

The new symbol of maturity, independence and responsibility.



"My parents gave me my smartphone at the end of the summer, I remember that day clearly and it became my way of communicating with my friends and something I have to protect"

Etor, 15

#4 Smartphone Crush

INSIGHT

Their first smartphone gives the start to a new era of independence and responsibility, making them more mature when they learn how to use it.

THE DAY THEY MEET EACH OTHER

All the interviewees remember the day their parents bought them their first Smartphone as it is a moment with many meanings. **The parents gave them a piece of independence**, gave them **an object of great responsibility** and gave them a **way of communication** with their parents, friends and the world around them. **This deep desire in previous generations was similar to having a first car**, taking into account that this happened when you were at the age of 18 (or 16 in the case of a motorbike) and now it happens earlier, around the age of 12 while going to secondary school.

DESIRE TURNS INTO ANXIETY

The young people we've talked didn't ask for a smartphone until most of their classmates had one. When they have it in their possession, the first thing they do is to download apps to contact with their friends and **show them this treasure they have just acquired**. For the first couple of weeks they start using it ceaselessly, **changing their behaviour and relationships with their surroundings and finally turning into anxiety**.

“My first big moment of responsibility was when my parents gave me my first smartphone, my family had given me something I had to protect”

Oriol, 22

“Whenever I'm studying I leave my phone next to it, and I don't know how but I always end up with my phone in my hand”

Etor, 15

“I was really hooked at first, my parents took my smartphone away, and they kept it in their office, I couldn't get in and I only could use it an hour a day”

Valeria, 16

#4 Smartphone Crush

LEARNING BY LIMITING USE

It is the parents who have to control this recent addiction they have created in their children and warned them about privacy. Among the youngest respondents there were several cases in which **the use of smartphones was restricted**.

- **Daily time restrictions:** Only use the smartphone for 30 minutes a day or take it to school if necessary.
- **App-based restrictions:** Apple's iPhone models can be controlled by parents, so they can limit remotely an accorded time frame of usage with the young. It warns the consumer 15 minutes before and then automatically switches off.
- **Hidden in forbidden places at home:** Parents keep the smartphone in their home office, and youngsters could only use it once a day after dinner.

The majority of adult interviewees (between 20 and 22 years old) **were aware of their excessive use of the smartphone** but had their control techniques. They had learned to control their initial anxiety, for example, they challenge themselves when they study and only use their smartphone when they have completed a task.

“Social networks can sometimes be dangerous depending on how you use them, if you don't take care about you can be spied on or hacked, but since I have a private account, I only accept people I know”

Olivia, 14

“During the day I use too much Instagram, I should use it less, anytime I want to make a break from studying I look at it”

Guillem, 18

#4 Smartphone Crush

NEWS CONSUMPTION

The smartphone is their tool to stay in touch with their friends; it has replaced the computer as the main point of the interaction with their peers. It is the **open door to all the information** they want and need whenever. If **something important happens in news they can stay tune in 2 seconds through their mates.**

“I use Instagram and stories to get the big news of the day, someone hangs it up within 2 seconds”

Oriol, 22

ENTERTAINMENT

Music, YouTube videos and social networks are the main domains of the Smartphone. However, **for watching series, they prefer using the tablet and view it from their room, as their private place.** We've found that they prefer to watch series rather than movies because they're not able to keep their attention so continuously. They don't watch TV (just a little with their parents) and neither read magazines, **everything has become digital.**

“When I finish my homework, before dinner I make use of my free time to watch series in my room and always in Netflix. I prefer series than movies because I don't finish them”

Sofía, 16

ROLE OF TECHNOLOGY

Gen Z perceives the role of technology as **indispensable** but at the same time, they are **conscious** that they spend **too much time with it.** They are learning how to achieve a **balanced** use of it.

“My relationship with technology in 1 word is narrow. I spend all day with technology, at school programming with my laptop and my smartphone for entertainment”

Guillem, 18

Gen Z's word-cloud about the role of technology in their lives

CONVENIENT ABUSIVE BALANCED
NARROW INDISPENSABLE DEPENDENT
TIME-CONSUMING ESSENTIAL

#4 Smartphone Crush

EACH GENERATION HAS HAD THE ELEMENT THAT GAVE THEM INDEPENDENCE, RESPONSABILITY AND FREEDOM



THE WEDDING FOR GENERATION X

At that time, getting married had many meanings, as **it gave couples the opportunity to go and live together**, away from their parents, the responsibility of having children and a way of developing their life independently. **This moment was when youngers were about 25 years old**, many years younger than the age at which youngsters are currently marrying.

“My parents got married at 24, I'm almost that age but the time will come, I still have many moments to live”

Pol, 21



THE CAR FOR MILLENNIALS

When they turned 18, one of the first things they had to do was to get a driver license. **This was a proof of responsibility** and with it came the intrinsic purchase of a car by their parents or at least the desire to have one. **This offered freedom and independence to young people**, since at that age they were still living at home with their parents.

“I don't think I'll have the need to buy a car when I grow up, it doesn't bring me anything, I move around in the subway and they even pollute”

Olivia, 14



THE SMARTPHONE FOR GEN Z

Young people between the ages of 12 and 14 years old receive **an element that gives them independence, responsibility and communication with their friends**, just as parents are offered control over them, at an age when they are already starting to go out with their friends on the street.

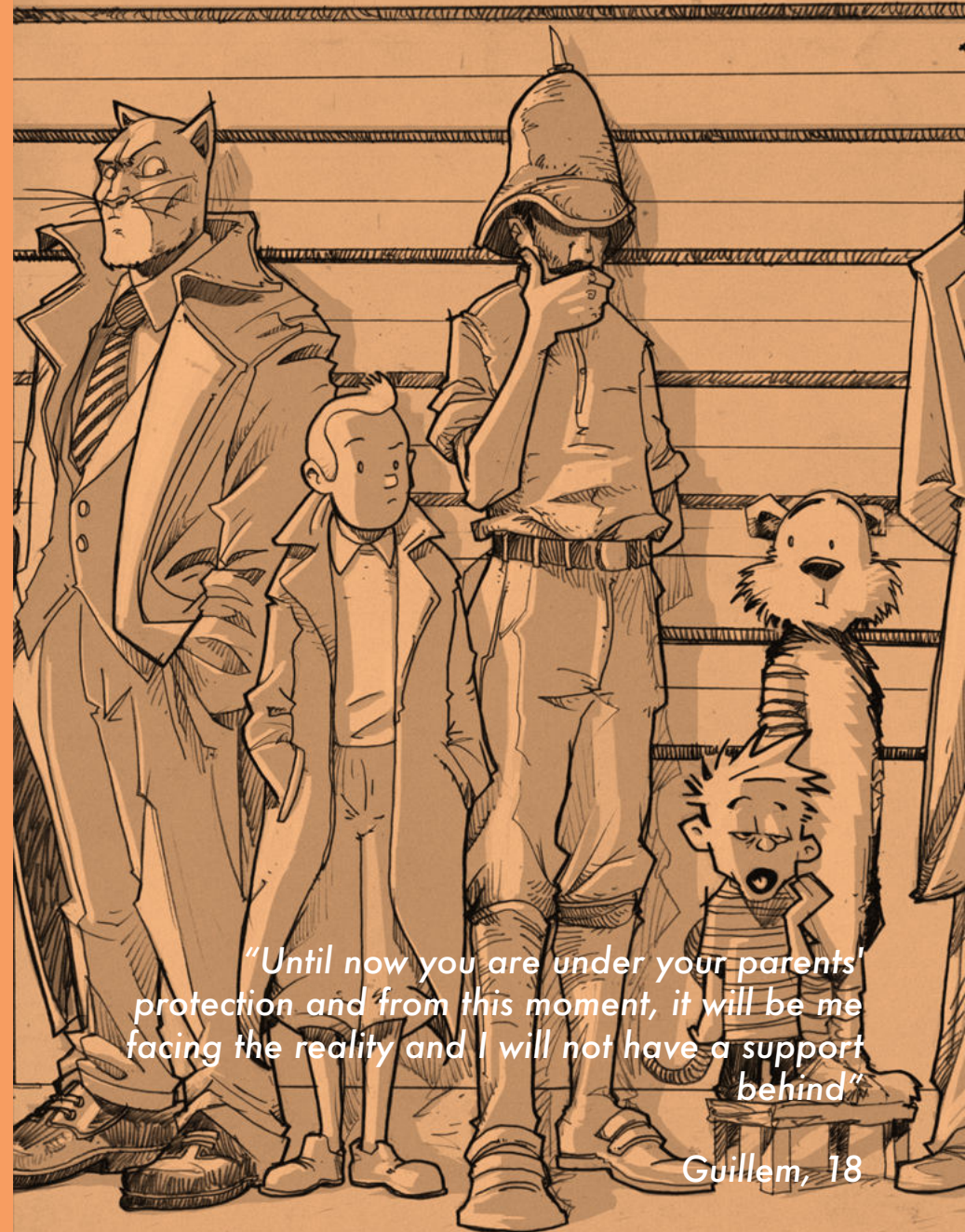
“With my smartphone, I felt more like an adult. When I got it on the last day of school before summer, I felt like a boss, older”

Etor, 15

#5

Trustful Guidance

They look for close people to help them grow.



"Until now you are under your parents' protection and from this moment, it will be me facing the reality and I will not have a support behind"

Guillem, 18

#5 Trustful Guidance

INSIGHT

Although they are self-sufficient, they need an external guidance to grow, running away from influencers that do not fit with their values.

THERE IS NO CLEAR PATH

They had no references. This is because no one is able to show them a pathway like the one marked out for the Millennials. **They need people to help them reduce the uncertainty in which they live.**

RUNNING AWAY FROM VIP INFLUENCERS

Their digital referents are not the great influencers; **they feel more identified with people like them.** Micro influencers that could well be them, **who have the same values of authenticity and naturalness**, ordinary people with some kind of **special skill or because they inspire them** (jokes, commenting on sports, video game gameplays, make-up skills, lifestyle, adventurers, women with success stories, etc.). In fact, **when these micro influencers get too big, they stop following them** because their values have changed.

"I don't follow empty people as influencers who don't bring me anything. I like to listen on YouTube to some guys of my age talking about the NBA because they know a lot"

Guillem, 18

"I have no references, there are people I like the way they think, I take things from everyone, but I have no one I want to look like, I have no prototypes to follow"

Martina, 18

"I don't give "likes" to influencers, but I do follow Grace Villareal (on YouTube) is a young mother with 3 children, I admire her for her ability to overcome, for her advice on life and her recipes"

Alba, 19

#5 Trustful Guidance

PARENTS: A RELATIONSHIP BETWEEN EQUALS

As discussed in chapter 1 (Untagged), parents are important as they support in major decisions and maintain their complicated balance in the changing times in which they live. **Because Generation Z parents cannot set a path for them, they present themselves at the same level**, inspire them, teach them things and they all learn from each other, it is a relationship of equals. But **there are times when they can't tell their parents everything** or they are not there at that moment and external family members are considered vital.

TRUST IN EXTERNAL FAMILY MEMBERS IS VITAL

What **they really need are people who can guide them in their maturity period**, in other saying, close people they trust (grandmothers, uncles, sisters, teachers, friends, etc.). Trusted people are usually people outside the home and have a great impact on their lives, advising them at specific times and guiding them on their way. For example:

- Guillem told us how much **his uncle** had marked him as a child, at different times in his life, and that **he was his role model and helped him define who he wanted to be.**
- Sofía cared a lot about what others thought, but **thanks to a friend** she talked to a lot, it helped her think more independently and grow personally.

“Family is very important. It brings me happiness, it's the most basic thing I need, also my parents have given me a lot of advice and have influenced a lot the way I am”

Olivia, 14

“My uncle has been my role model and helped me define what I want to be and what I want to achieve. You're at that age that you're realizing things and he was the closest person I had, even closer than my parents”

Guillem, 18

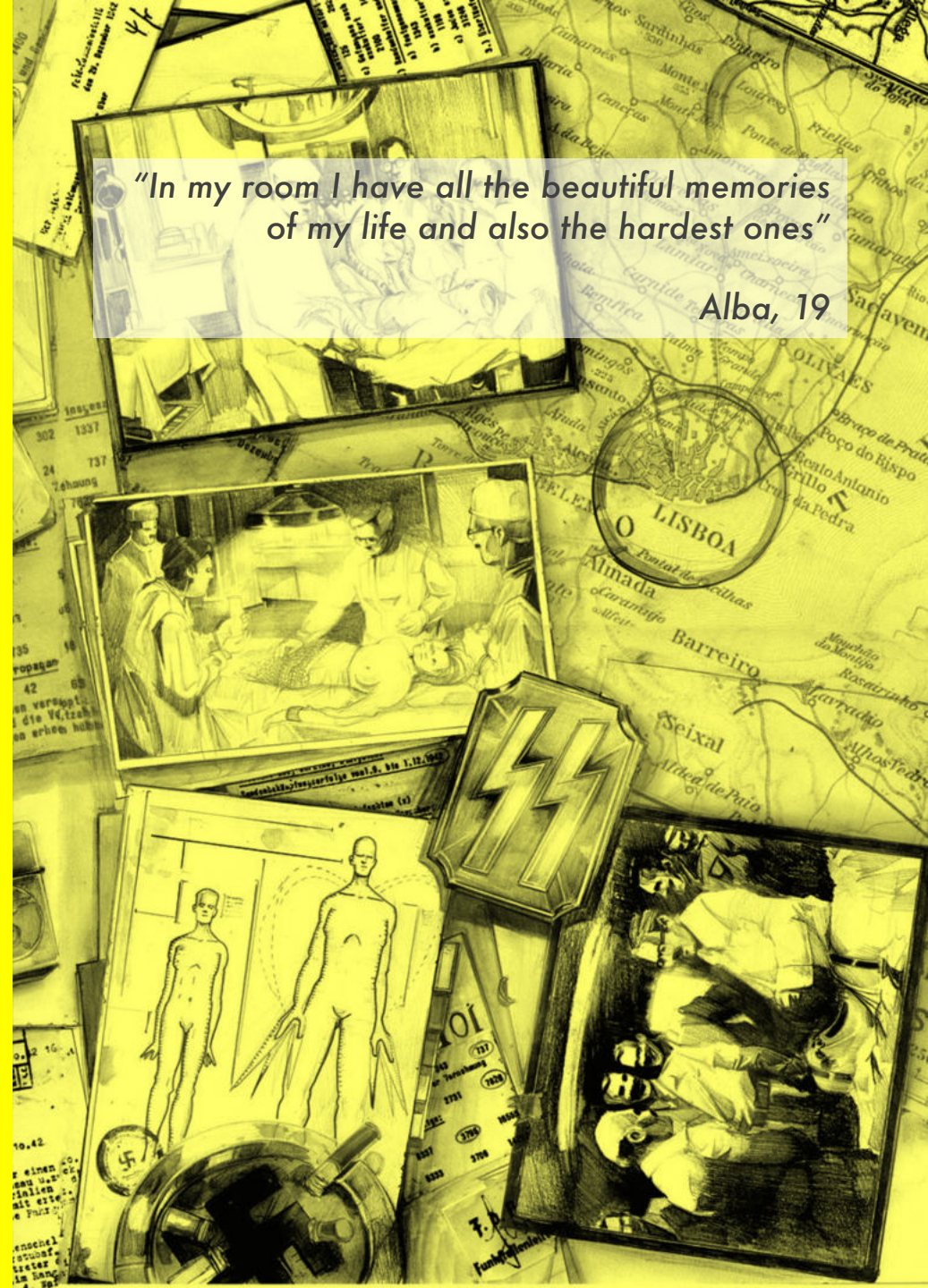
“I used to worry a lot about what other people thought of me. Now I'm more independent. I have a friend that talking to her has helped me to change”

Sofía, 16

#6

Tangible Treasures

They avoid the ephemeral of the digital by owning meaningful objects.



"In my room I have all the beautiful memories of my life and also the hardest ones"

Alba, 19

#6 Tangible Treasures

INSIGHT

In an era that everything is ephemeral, preserving tangible memories is key to remaining original to their roots.

MUSEUM-OF-ME

The world is going so fast that they need to have something to hold on to and stay on the ground. **Their bedrooms contain all the treasures accumulated in their vital moments**, those physical stuff that make them remember their great moments and **have a meaningful meaning beyond. People are described by their stuff.**

- The passion in sports is reflected in the number of objects related to their favourite sport. Football shirts, balls, scarves, all the ballet shoes Alba has used in her career hanging on the wall, concert tickets, photos of great moments with friends, Interrail tickets, etc.
- As well as objects related to his sporting and social achievements such as medals, trophies, newspaper clippings with their photos on them, etc.

THEIR PRIVATE LAIR

Their bedroom is their private space, where they spend most of their time studying, trying on daily clothes, watching streaming series, listening to music, talking to their friends, being inspired and dreaming about their future. **It is a special place and an extension of themselves.**

“The favourite part of my bedroom is the board where I have all the photos of Summer with my friends, the tickets of the concerts and memories of my trips”

Alba, 19

“This is the cover of the local newspaper, with me in the foreground and my friends behind with the bodyboards”

Etor, 15

“I like being in my room, surrounded by my stuff, it's like, my personal space”

Olivia, 14

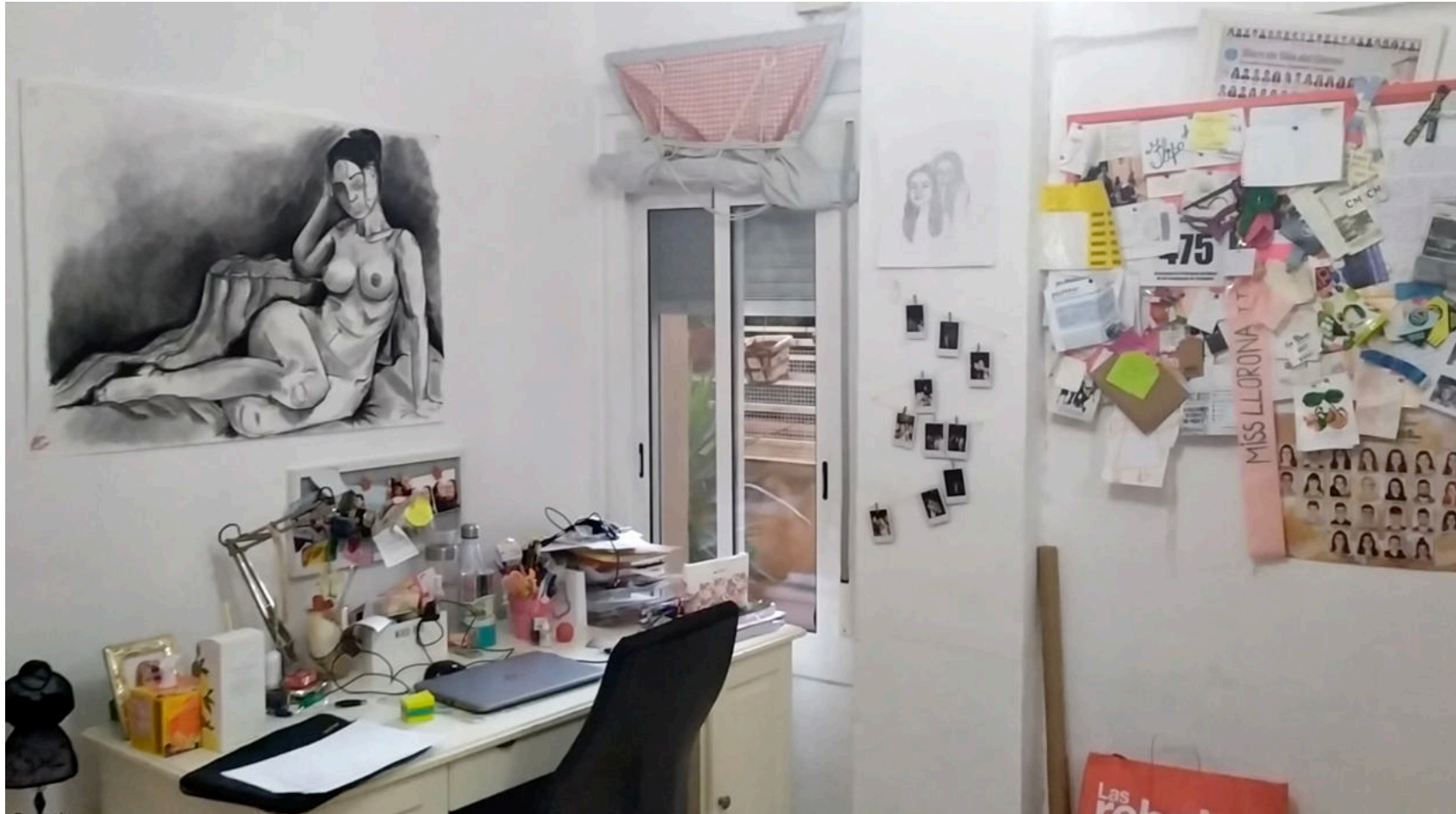
“My wall is full of my paintings and famous ones as a daily inspiration for myself and my art”

Regina, 17

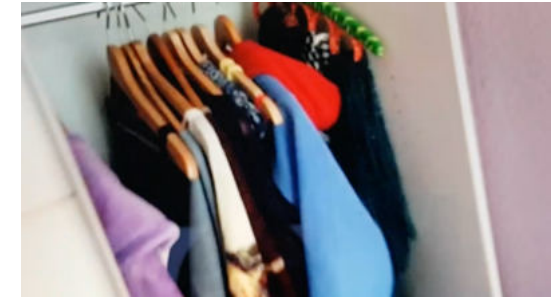
#6 Tangible Treasures

"This is my room, I spend most of my time here when I'm not in school, it's my private space"

Alba, 19



#6 Tangible Treasures



*“The most valuable item is this picture that I got from the kids I was training”
Guillem, 18*

*“My favourite clothes are this white turtleneck, I'm super stylish with it and I usually wear it for luck in exams”
Sofía, 16*

#

Own-destiny Seekers

No one but them can choose what they want to be in
the future.



*"I spent a year in the US and at first it was
hard, but then I said: I have to move on, if not
I will not enjoy the experience"*

Martina, 18

#7 Own-destiny Seekers

INSIGHT

The uncertainty makes them find innovative ways to choose regarding what they want to be in the future.

THEY CHOOSE THEIR OWN FUTURE

Generation Z is aware of the job uncertainty they face. **No one can assure them job opportunities**, and therefore:

- Younger people study as much as they can so that they can **have all the options of career choice which may be open to them.**
- They **seek as much information as possible to reduce uncertainty**, ask their trusted guides for advice and avoid making mistakes.
- They have to reinvent themselves, **develop their hobbies to make them their way of living and earning money.**
- They have **matured faster and are responsible.**
- They do **small jobs to avoid burdening their parents** with more household expenses, **it's money they spend with their friends and they save for trips**, rather than for shopping online, it's not what they do most at this age.
- They **fight with their family to convince them that what they have chosen is right** even if they are not sure of it.

“When I chose the career I made a lot of research, it was an important decision and I wanted to have as much information as possible, I didn't want to make a mistake”

Guillem 18

“I changed my career in 2nd grade to one I liked much better, I don't think I lost any year, it doesn't matter if you start a career with 18, 20 or 25, the point is to study something that fills you up and is useful for the future”

Pol, 21

“It took me a lot of effort to convince my parents that the career that I was going to do had job opportunities, I achieve it but I really don't know if this is going to give me a future, but I will fight it”

Oriol, 22

#7 Own-destiny Seekers

THEY KNOW WHAT THEY WANT FOR THEIR FUTURE

The main concern of these young people today is to pass their exams, get an entrance ticket to university and get a job related to their studies. But beyond that, **they want to be independent**, get their own flat, live abroad, share a flat and they know that for all this, **they need to earn money to make them come true**. This is reflected in their concerns for doing small jobs that allow them to enjoy their hobbies and travel.

WHEN THEY'RE 70 Y.O...

We proposed an exercise for them to think about what memories they would have when they were 70 y.o. and they didn't say too far things that we are used to. **Young men** stated that they would **remember their great moments with their friends**, trips abroad, jobs and partners. While **young women talked about more vital moments such as moments** they met with their first partner, **the day they gave birth to their first child**, as well as their best moments with their friends and families.

“Now with the Coronavirus madness the ones who will be most affected are us, the ones who are about to go to work, so we will have to keep preparing ourselves more”

Pol, 21

“My concern right now is to study hard so that I don't go through what happened to my sister when she repeated courses and her friends left so that I can choose what I want”

Sofía, 16

“I want to work on something I like, but I don't want it to be my life”

Martina, 18

“At 70 y.o. I'll remember my first love. It will only happen once in a lifetime, it's not like having a child that you will enjoy all your life, but your first love, that will be unique”

Alba, 19

#

How technology can leverage Gen Z?

Their impact on the industry.

#1 Untagged

INSIGHT

Digital world is the playground where they show their active behaviour, define their identity and express their authenticity avoiding being labelled.

DESIGN IMPLICATIONS

Use technology to attract Gen Z by **letting them be the protagonists**, giving them the opportunity to **enhance the creativity** and empower them to be in the center of decisions. They have unique ways of using their network of trust to attract people with the same interests and values.

#contribute #creativity #collaboration #skills #speak_their_language #gamification

DON'T TELL THEM WHAT TO DO, WHAT TO BUY OR WHAT TO LOOK FOR, THEY KNOW HOW TO DO IT ALONE.



WORKFORCE

Letting Gen Z teenagers literally run the company

American Eagle, a retailer dedicated to diversity and inclusivity, formed the AExME Council, a cohort consisting entirely of Gen Zers. Each member is paired with an American Eagle “mentor”, and they meet about once a month to create actions about sustainability, inclusion, body-positivity, involve consumers in marketing campaigns, etc.

<https://www.teenvogue.com/story/american-eagles-aexme-council>

#2 Game-changing Experiences

INSIGHT

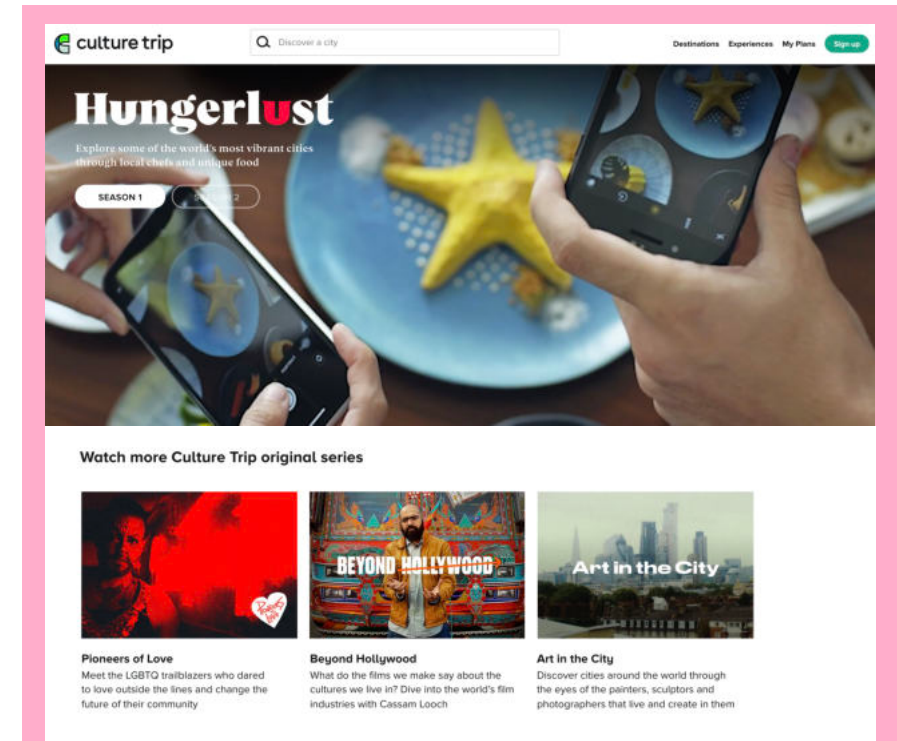
They experience multitude of unique moments that make them grow at different speeds.

DESIGN IMPLICATIONS

Use technology to let **Gen Z youngsters boost personal growth by experiencing activities related to their values** of ethic, social consciousness, sustainability, healthcare, diversity and gender equality. This will turn their key times into memorable experiences that may open perspectives and turn them adventurous person but being safer.

#grow #new_cultures #open_mind #memories #learn #consciousness #personalized_approach

THEY ARE LIVING VERY DEEP CHANGES, MAKE IT EASY FOR THEM.



TOURISM & LEISURE

The Go-to-Platform for Gen Z Travelers Around the World

The travel start-up is responding to this market generational shift in travel habits by launching a range of exciting experiences (sustainable sightseeing, mind-body-soul-centered, LGBTQ-focused, etc.). Culture Trip have quick video series (Hungerlust, Pioneers of Love, Art in the city) that shows a city through original angles.

<https://theculturetrip.com/presents/hungerlust/>

#3 Clandestine Tribes

INSIGHT

Gen Z's show their true face in small groups where they feel free and confident to talk about any issue.

DESIGN IMPLICATIONS

Technology should **reach young people in trustful micro spaces**, keep their privacy safe, and let them develop their personality and share their experiences. These spaces will let the opportunity to be innovative and free to express themselves.

#micro_communities #real_connections #closeness #transparency

THEY MOVE IN MICRO-COMMUNITIES WITH A LOT OF TRUST, WHATEVER YOU DO, DO IT LOCALLY, CLOSE, GAIN THEIR TRUST.



LIFESTYLE

Empowering citizens in trustful micro-communities

Sexual health is also starting to be taken seriously as an important part of health. In China, a platform called Yummy provides an environment where women are free to discuss sexual matters, from intimacy to orgasm, and health issues such as breast cancer prevention. Two million users.

<https://headtopics.com/co/yummy-la-empresa-que-reta-el-tab-sexual-en-china-6994516>

#4 Smartphone Crush

INSIGHT

Their first smartphone gives the start to a new era of independence and responsibility, making them more mature when they learn how to use it.

DESIGN IMPLICATIONS

Technology should help to turn the first mobile experience into something memorable, showing the value and **usefulness** of the device, but at the same time teaching young people how to manage it **responsibly to avoid addiction**.

#first_moment #responsibility #show_me_the_value #wellbeing #addiction #balance

THE SMARTPHONE IS THEIR WEAPON, IF YOU WANT TO BE IN THEIR POCKET, USE IT.



HEALTH & WELLBEING

Instagram began a trial of hiding its “like” counts feature

Instagram has had successful trials exploring ways to reduce pressure. Hoping to reduce the public’s mentality of comparison to reduce the psychological pressure of users. The objective is to erase zombie followers and let content creators be more creative and focus on content production.

<https://hypebeast.com/2019/7/instagram-trial-hiding-likes-on-posts-us>

#5 Trustful Guidance

INSIGHT

Although they are self-sufficient, they need an external guidance to grow, running away from influencers that do not fit with their values.

DESIGN IMPLICATIONS

Technology should help to provide young people **trustful guidance that help them** through the most important steps of their life. Help them to improve their literacy, enhance their critical thinking and develop their self-empowerment.

#grow #learn #consciousness #self_empowerment #guide #sherpa

**NEED GUIDANCE TO
REDUCE UNCERTAINTY IN
ALL THEIR DECISIONS.**



BANKING

Teaching financial literacy to a digital-native generation

Junior is intended to give children and adolescents the freedom to build essential financial skills and to manage their money. Parents can monitor kids' spending through the app, adding money when needed and limiting which venues it can be spent at.

<https://tearsheet.co/new-banks/inside-revolut-junior-a-banking-product-targeting-kids/>

#6 Tangible Treasures

INSIGHT

In an era that everything is ephemeral, preserving tangible memories is key to remaining original to their roots.

DESIGN IMPLICATIONS

Gen Zs show also special interest in **physical, retro and genuine things that evoke them great moments of their lives**. Technology should try to reach them both online and offline, providing memories and experiences they would never forget.

#digital_memories #hidden_treasures #keep_safe #physical #meaningful #experiences

THEY ARE DIGITAL, BUT SEEK A BALANCE BY OFFERING PHYSICAL AND MEMORABLE EXPERIENCES THAT WILL REMEMBER IN THEIR ROOMS, THEIR PERSONAL TEMPLES.



RETAIL

Make Gen Z live meaningful physical experiences

In China, health and beauty retailer AS Watson talked directly to university students with a series of flash mobs and beauty classes as part of a series of on-campus activities. 99% of Gen Z shop offline and they like shopping in destination stores.

<https://www.aswatson.com/gen-z-drives-global-sales-for-a-s-watson-the-digital-native-eyes-on-beauty-stores-rather-than-online/#.Xm-eeJNKi9s>

#7 Own-destiny Seekers

INSIGHT

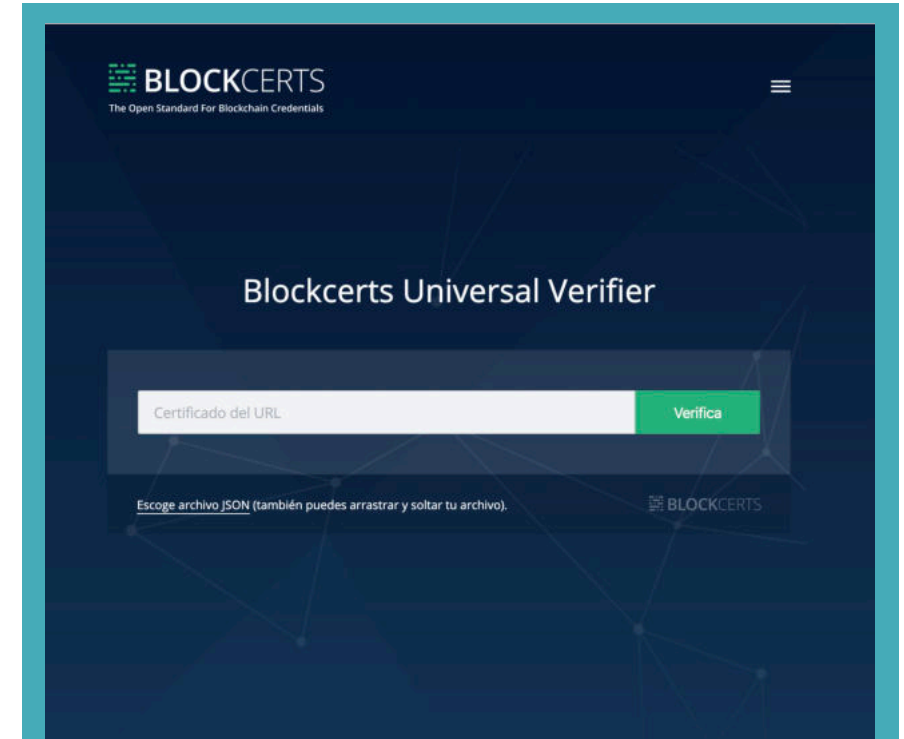
The uncertainty makes them find innovative ways to choose regarding what they want to be in the future.

DESIGN IMPLICATIONS

Technology should be used to **make predictions about the trainings and jobs that will be crucial in the next future**, to inspire, guide and help them to develop carefully and smartly their roadmap to adulthood.

#AI #growing_up #choosing_my_career #new_jobs #lifelong_learning #blockchain

BE PART OF THEIR FUTURE, BUT YOU WON'T BE THE ONLY ONE, SO CREATE COLLABORATIONS WITH OTHER BRANDS THAT ARE NOT EXPECTED.



EDUCATION

Blockchain as the answer to Gen Z's educational needs

Gen Zs are using learning platforms to graduate faster from college and thus, receiving credentials from different organizations. Blockcerts Wallet allows to certificate that courses are real, store and share their records in a private portfolio of achievement. With blockchain, the job will find the student, inverting the current relationship.

<https://www.blockcerts.org/>

<https://www.ibm.com/downloads/cas/93DDVAKE>

#

How different is Gen Z...

... vs. Millennials?

GEN Z

THEY HAVE GROWN UP IN THE POST-CRISIS ERA WHERE THEY HAD NO PRE-DEFINED PATH TO CHOOSE THEIR FUTURE.

UNCERTAINTY

01 | Untagged.

STABILITY

MILLENNIAL

MILLENNIALS HAD STABILITY AND A PATH BUT THEY HAVE FOUND THAT EVERYTHING THEY HAD FOUGHT FOR WAS A LIE.

LIFE MOMENTS ARE SIMILAR, BUT THE DECISION TO CHOOSE THEIR FUTURE COMES FROM AN AWARENESS OF INSTABILITY

CONSCIOUSNESS

02 | Game-changing Experiences.

UNCORCENED

THEY HAVEN'T HAD TO FIGHT AS HARD AS GEN Z'S, HOWEVER, WORK HAPPINESS IS NOT WHAT THEY WERE PROMISED

AWARE OF THE DANGER OF HANGING UP TOO MUCH INFO, THEY PREFER TO EXPRESS IN SMALL GROUPS OF TRUST

AWARENESS

03 | Clandestine Tribes.

UNCONSCIOUSNESS

THEY WERE UNKNOWINGLY EXPOSED TO THE NETWORKS AND HAVE SHARED TOO MUCH INFO ABOUT THEMSELVES

WHILE MATURING, THE SMARTPHONE GIVES THEM INSTANT FREEDOM WHEREVER THEY ARE AS WELL AS RESPONSABILITY

RESPONSABILITY

04 | Smartphone Crush.

CONNECTIVITY

FOR MILLENNIALS CONNECTIVITY STARTED LATE, FOR THEM FREEDOM WAS TO HAVE A CAR AND TRAVEL ABROAD

GEN Z DO NOT HAVE REFERENCES, THEY RUN AWAY FROM VIP INFLUENCERS AND THEIR ROLE MODELS ARE RELIABLE PEOPLE

FAMILY

05 | Trustful Guidance.

INFLUENCERS

MILLENNIALS HAVE GROWN UP WITH INFLUENCERS AND FEEL MORE IDENTIFIED WITH THEM

THEIR MOST PRECIOUS POSSESSIONS ARE KEPT IN THEIR ROOMS, MEMORIES OF THEIR BEST EXPERIENCES

MEMORIES

06 | Tangible Treasures.

NOSTALGIA

THEY KNOW THE VALUE OF TECHNOLOGY, HAVING GROWN UP FULL OF GADGETS THAT THEY KEEP WITH NOSTALGIA

SINCE NO ONE WAS SHOWING THEM THE WAY, THEY HAVE BUILT IT BY THEMSELVES, LEVERAGING THEIR HOBBIES

BUILDERS

07 | Own-destiny Seekers.

REINVENTED

THEY CAME OUT INTO THE WORLD FRUSTRATED BECAUSE EXPECTATIONS WERE NEVER MET AND HAD TO REINVENT

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Thank you!

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