

Brands get ready - Gen Z are growing up and ready to challenge says Kantar Millward Brown

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'AdReaction: Engaging Gen X, Y and Z' reveals key learnings to help marketers connect with different generations more effectively across traditional and digital channels



A new *AdReaction* study from Kantar Millward Brown, released today, reveals Gen Z has its own distinct behaviours, attitudes and responses to advertising. The study, [AdReaction: Engaging Gen X, Y and Z](#), is the first-ever comprehensive global study of Gen Z, and provides guidance on how marketers can engage more effectively with this increasingly important group.

The study analyses key media consumption patterns, attitudes toward advertising and responses to specific creative approaches, and is based on surveys of more than 23,000 consumers in 39 countries.

This is the first time it has been possible to explore the opinions of the first cohort of Gen Z – now aged 16-19 – that are becoming increasingly relevant to brand marketers across a wide variety of categories and products. The Gen Z population numbers approximately two billion globally.

AdReaction: Engaging Gen X, Y and Z highlights that Gen Z are even more passionate about music than millennials (43% like to have 'always on' access to music compared to 30% for Gen Y) and more digitally savvy than previous generations. Gen Z are also more difficult to engage; among people who skip ads, they skip three seconds faster per ad on average than Gen X.

"Gen Z have grown up in an on-demand world of infinite choice, and this flavours their expectations of advertising. They are much more attracted to ads that allow them to co-create or shape what happens, compared to Gens Y and X, who have a higher preference to link to more information about the brand," said Duncan Southgate, Global Brand Director, Media & Digital at Kantar Millward Brown.

[AdReaction: Engaging Gen X, Y and Z](#) identifies a number of key opportunities for brands to connect with Gen Z:

Don't ignore traditional media: Despite their digitally dominated media consumption, Gen Z can still be impressed by traditional media. While they spend less time with traditional (51% watch an hour or more of TV a day compared to 74% for Gen X), Gen Z are consistently more positive about ad formats such as outdoor, print ads and cinema, TV and radio ads than standard digital alternatives.

Respect their online space: Within the digital space Gen Z are more positive than other generations towards mobile rewards video and skippable pre-rolls (which achieve net positive scores of 41% and 15% respectively), but especially damning of invasive ad formats like non-skippable pre-rolls and pop-ups (-36% and -42% respectively).

Creative approach makes a difference: Music, humour and celebrities all make Gen Z more receptive to advertising. They are also attracted to ads that allow them to co-create or see what happens when they make a decision. They are more positive towards brands that let them vote for something to happen (31% compared to 25% for Gen Y,) choose an option (28% compared to 25%) or take decisions (27% compared to 22%). However, these attributes alone are no guarantee of success.

Design matters: An extremely design-conscious consumer, Gen Z will take note of an ad's aesthetic qualities and appreciate the use of new immersive formats like Augmented Reality and Virtual Reality. Innovation in formats like native ads, sponsored lenses and sponsored filters all attract much stronger approval with Gen Z than other age groups.

Be even more social: Gen Z are significantly heavier users of social platforms, not just in terms of the time they spend on them but also the number of platforms they visit. These range well beyond Facebook and YouTube and include Instagram, Twitter and Snapchat. 36% of Gen Z globally access Instagram several times a day and 24% access Snapchat at the same frequency, compared to 21% and 10% respectively for Gen Y (those aged 20-34) and 9% and 4% for Gen X (those aged 35-49).

Don't apply the same approach globally: Gen Z is not homogenous and local insights reveal further nuances. In China, for example, Gen Z want music in ads to be upbeat, playful and fun. By contrast in Germany, Gen Z seeks music that helps them to understand the message without listening to a voiceover.

Using both qualitative and quantitative research techniques combined with ad testing of 31 ads in 10 markets, *AdReaction: Engaging Gen X, Y and Z* reveals a generation that, in some areas, are simply a little more extreme in their media attitudes and behaviour, but also have their own distinct traits.

Additional key findings include:

- This is the mobile-first generation with 74% spending more than an hour a day on their mobile device compared to 66% for Gen Y and 55% for Gen X. TV, radio and print consumption are all lower as well with 51% of Gen Z watching an hour or more of TV each day compared to 59% for Gen Y and 74% for Gen X.
- Gen Z are dramatically more passionate about music and movies. Ads placed in these contexts are far more powerful with this group, with 39% of Gen Z saying music makes them more positive to advertising and 38% reporting that movies have the same effect (compared to just 29% and 28% for Gen X).
- All generations prefer short videos, but Gen Z like ads less than 10 seconds even more than previous generations, while Gen X is more tolerant of videos up to 20 seconds.
- Gen Z are slightly more likely to have installed ad blocking software on desktop than older consumers (31% vs 30% for Gen Y and 22% for Gen X) but they are no more likely to have installed a mobile ad blocking app (13% vs 14% for Gen Y and 12% for Gen X).

Given their scepticism towards advertising, this makes branded content more attractive to Gen Z. Formats like branded events, social media feeds and celebrity endorsements all score higher for this group globally than older consumers. Gen Y is more positive about user reviews, social media and native information, while Gen X prefers brand information.

“No generation is a monolith and Gen Z is no exception. Their upbringing, expectations and access to technology, however, has created a range of attitudes and behaviours that will challenge marketers. Only where brands take all this into consideration will they be successful in engaging this increasingly critical and fast-emerging group of consumers,”

concluded Southgate.

Review the global and country-specific results of the *AdReaction: Engaging Gen X, Y and Z* report [here](#).

About *AdReaction: Engaging Gen X, Y and Z*

Kantar Millward Brown surveyed more than 23,000 16- to 49-year-old consumers across 39 countries. Qualitative research was also conducted among Gen Z in the US, Germany and China, and 31 TV ads were tested across TV, and digital platforms in 10 countries. The [AdReaction: Engaging Gen X, Y and Z](#) study explores advertising receptivity across three generations to analyse and understand when and where each group is most likely to respond positively to advertising. It also provides marketers globally with practical advice about which creative approaches work best across the three generations.

AdReaction studies have been conducted since 2001, delivering insights on consumers' perceptions of advertising, particularly digital formats.

AdReaction: Engaging Gen X, Y and Z addresses key questions facing marketers, including:

- What are Gen Z's characteristics, desires, likes and dislikes, and how do they want to interact with brands?
- How do the media attitudes and behaviours of Gen Z differ from Millennials (Gen Y) and Baby Busters (Gen X)?
- What do marketers need to know to navigate emerging social trends and cultural norms as they develop content and plan media?

About Kantar Millward Brown

Kantar Millward Brown is a leading global research agency specialising in advertising effectiveness, strategic communication, media and digital, and brand equity research. The company helps clients grow great brands through comprehensive research-based qualitative and quantitative solutions. Kantar Millward Brown operates in more than 55 countries and is part of WPP's Kantar group, one of the world's leading data, insight and consultancy companies. Learn more at www.millwardbrown.com.

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