COLLAGE
GENERATIONS

21+ Gen Z
Consumer Essentials

Drive brand relevance with Cultural Traits



Spring 2024

Cultural Fluency

is the ability to use **culture** to efficiently & effectively **connect** across segments

Key lessons from Culturally Fluent brands

Culturally Fluent brands:

1. **Make culture a core component** of their strategic approach
2. Leverage **data and analytics** to decipher and navigate cultural complexity and nuance
3. Highlight cultural specificity to target specific segments and appeal to broad audiences through **halo effects**

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Collage Group Cultural Traits Survey 2024

Fielded January 2024 | **21-78** unweighted survey sample breakdown, n=4,411

Race/Ethnicity	
Hispanic	1,382
Black	751
Asian	1,124
White	1,099

Gender	
Woman	2,206
Man	2,182
Non-binary / other	23

Generation	
Gen Z	437
Millennial	1,460
Gen X	1,330
Boomer	1,184

Hispanic Acculturation	
Acculturated	406
Bicultural	586
Unacculturated	390

LGBTQ+	
LGBTQ+	520
Non-LGBTQ+	3,891

NOTE: Data present in this report is weighted to be nationally representative of Race/Ethnicity, Hispanic Acculturation, Age, Gender, and Sexuality.

Source: Collage Group Cultural Traits Survey, January 2024 (21-78 population)

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The Big Picture

Gen Z celebrates their individual uniqueness, and their collective challenge to create a brighter future



Collectively Unique

Celebrating differences is a core feature of 21+ Gen Z. Transcending the old trade off between individuality and collectivism, they are collectively, individual.

Optimistic Under Pressure

21+ Gen Z feels the pressure of looking to the future in an unstable present. But as a result, they are enabling change on an individual basis, and pushing brands to do the same.

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1

Identity

Connect with 21+ Gen Z’s evolving identities and experiences

2

Group Traits

Build trust and engagement through Group Traits

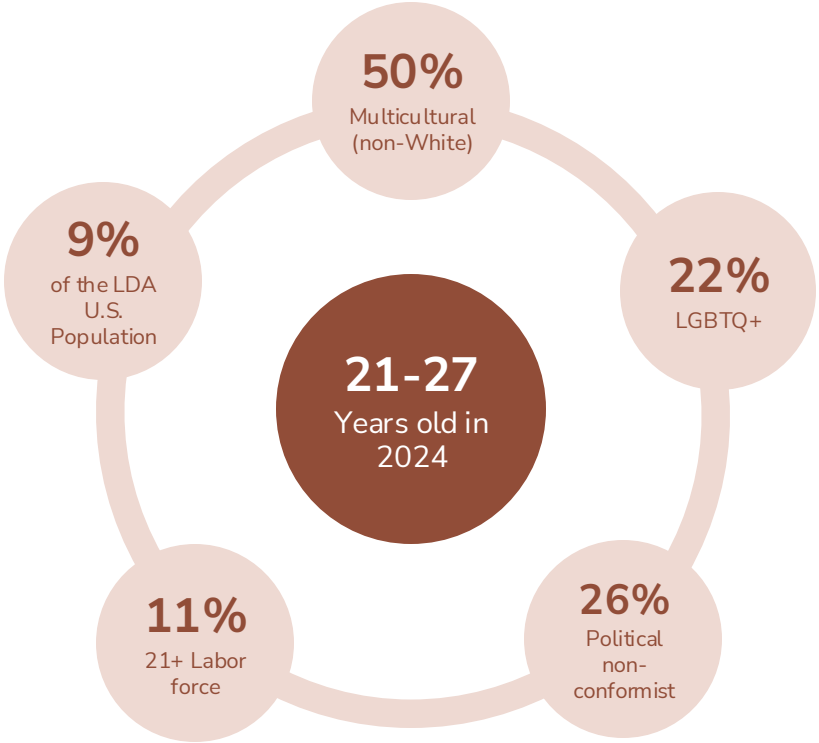


1

Identity

Connect with LDA Gen Z’s evolving identities and experiences

As they age into adulthood, LDA Gen Z's inherent diversity is shifting expectations for brands and marketers



22.3 MM

21+ US population size

Source: U.S. Census Bureau, Population Division, Release Date: June 2022; Annual Estimates of the Resident Population by Single Year of Age, Population Estimate as of July 1, 2021
Collage Group Custom Market Profiler; American Community Survey; 2022 1-Year Data
Collage Group Cultural Traits Study, January 2023 (age 21-78 only), weighted data
Note: The labor force is the sum of employed and unemployed persons as defined by the U.S. Bureau of Labor Statistics

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21+ Gen Z defines themselves by their personality as well as their life stage

Which 3 aspects of your identity would you most likely use to describe yourself?

▲▼ Significantly over/under Total Population. Confidence level 95%

	Gen Z	Millennial	Gen X	Boomer
1	Personality **58%▲**	Personality **51%▲**	Personality **47%**	Age/Life stage **43%▲**
2	Age/Life stage **39%▲**	Role in family **31%**	Role in family **32%**	Being American **41%▲**
3	Race **22%**	Gender **28%**	Gender **29%**	Personality **38%**

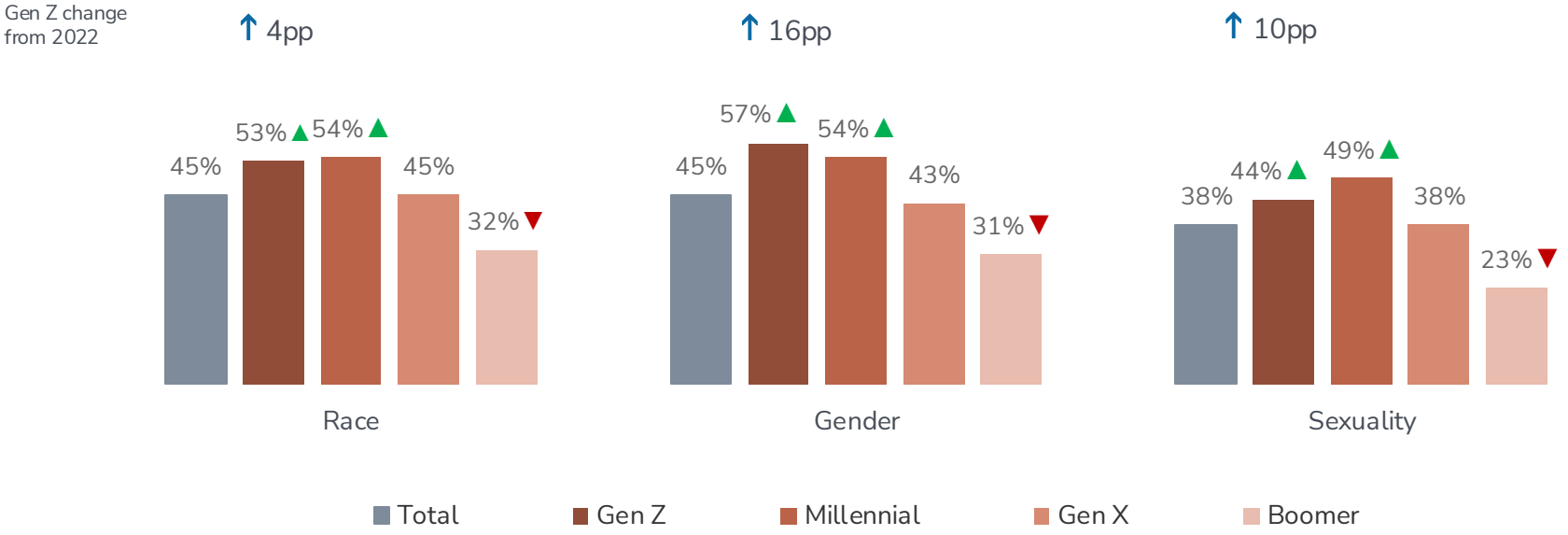
only 17%▼ of LDA Gen Z selected "Being American"

Source: Collage Group America Now Survey, August 2023, (21-77 population), weighted data
Multiselect, max. 3
Significance test: Confidence level 95%. ▲▼ over/under Total Pop.

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Race, gender, and sexuality are becoming increasingly important to younger LDA Americans' identity

My _____ has become an increasingly important part of my identity over the past few years.



Source: Collage Group America Now Survey, September 2022 (21-76 population), weighted data
Collage Group America Now Survey, August 2023 (21-77 population), weighted data
% agree
Significance test: Confidence level 95%. ▲▼ over/under Total Pop.

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2

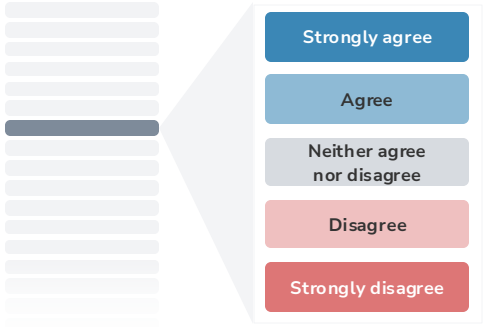
Group Traits

Build trust and engagement through Group Traits

Group Traits reveal consumers' nuanced motivations, over time

IN-GROUP AGREEMENT

Consumers gauge their level of agreement with 75 cultural statements



RESONANT VALUES
illuminate consumers' priorities, motivations, and aspirations

COMPARATIVE ANALYSIS

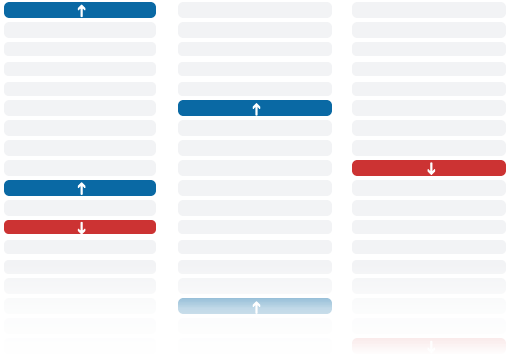
Identify uniquely resonant statements for the target segment



CORE DISTINCTIONS
examine unique, contextually important themes

TRENDING

Detect statistically significant changes in resonance over time

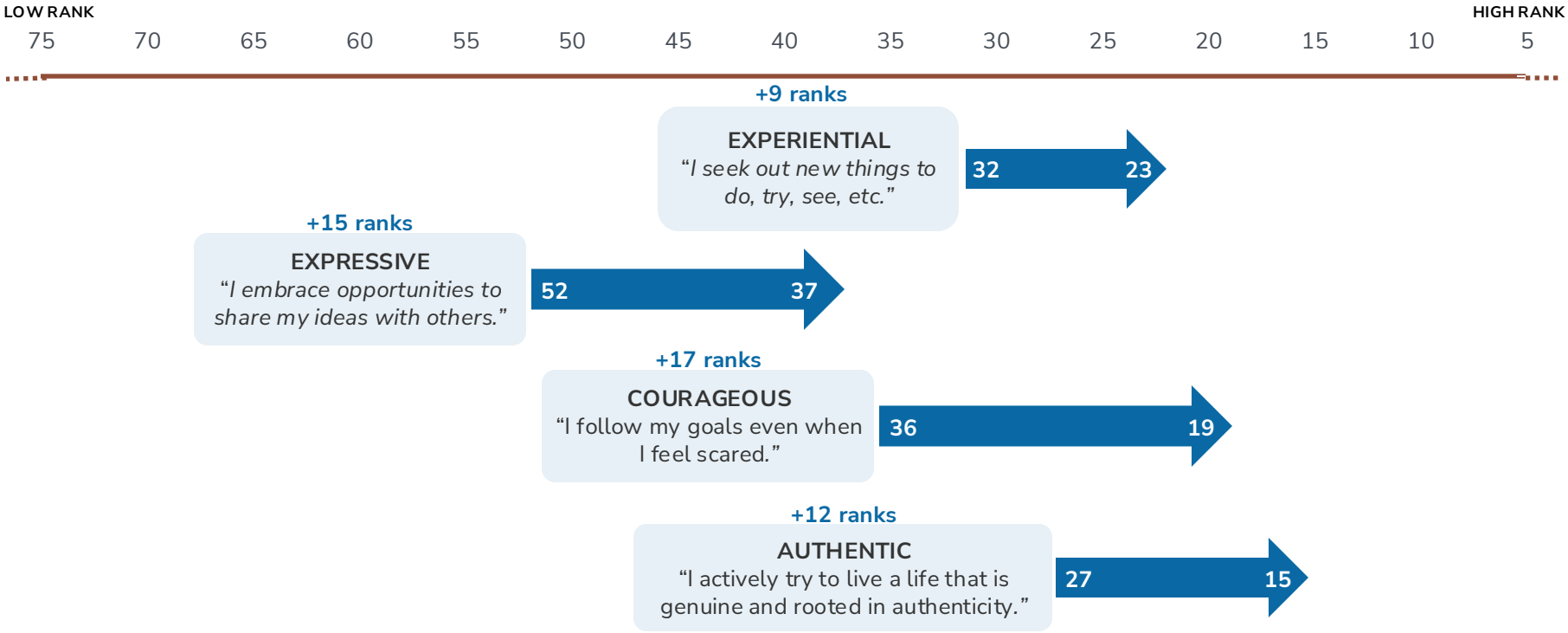


KEY SHIFTS
measure significant movement in agreement and rank

For more details on group traits methodology, refer to the Appendix

In 2024, LDA Gen Z is putting greater priority in turning outward

↑↓ Rank changes: 2022-2024



Source: Collage Group Cultural Traits Survey 2022-2024 (21-78 population), weighted data
% agree, strongly agree

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2024 21+ Gen Z Group Traits

Group Traits shape the segment's perspective, attitudes, and behaviors across categories

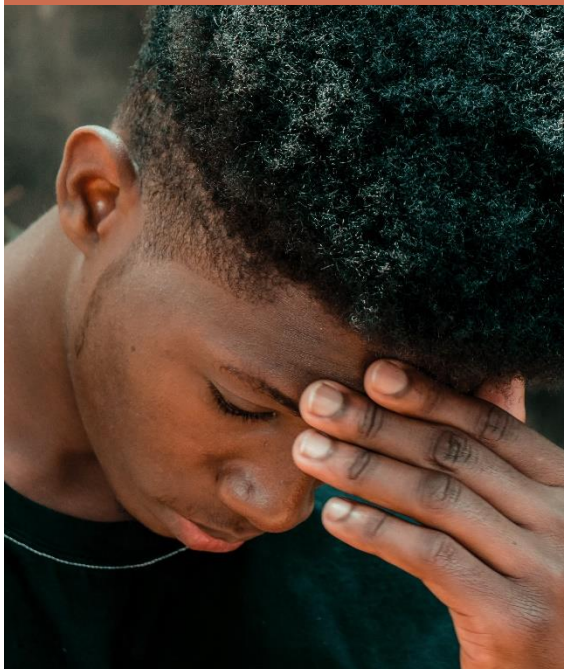
COLLECTIVE INDIVIDUALITY



GAME-CHANGING



PRESSURED



21+ GEN Z GROUP TRAITS

Collective Individuality

Unified in Uniqueness

Gen Z is the most diverse American generation to date. The segment's constant exposure to peers of different backgrounds heightened by their use of social media has made them more **open-minded** and accepting of differences. This openness has become internalized as a desire to embrace their own **uniqueness**, while expressing themselves **creatively**. They value that one's differences are what make a person special and interesting. They strive to unapologetically be themselves.

OPEN-MINDED

UNIQUENESS

CREATIVE



Source: Collage Group 2024

COLLECTIVE INDIVIDUALITY GROUP TRAIT

LDA Gen Z's inherent diversity enables them to celebrate the sense of difference that binds them together and empowers them to be themselves

Open-Minded

78%

"I enjoy learning from people who have different perspectives and life experiences than my own"

Uniqueness

73%

"I'm proud of the things that make me different from my peers"

Creative

73% ▲

"I like to express myself through style, creativity, etc."

RANK (out of 75)

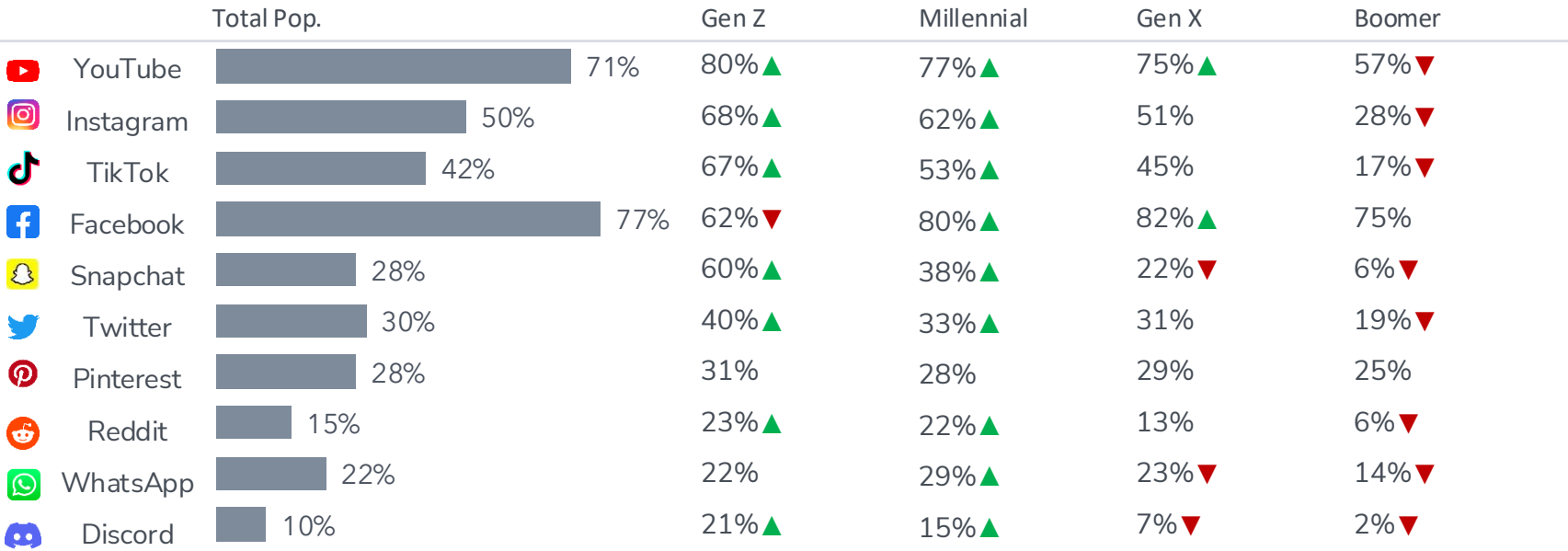
Gen Z	vs. Non-Gen Z	Gen Z	vs. Non-Gen Z	Gen Z	vs. Non-Gen Z
5	+6	18	+1	17	+35

Source: Collage Group Cultural Traits Survey, January 2024 (21-78 population), weighted data
% agree, strongly agree
▲▼ Significantly over/under Non-Gen Z. Confidence level 95%

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LDA Gen Z's social media usage supercharged their exposure to people from all walks of life

21+ Gen Z's Top 10 most used platforms



	Total Pop.	Gen Z	Millennial	Gen X	Boomer
YouTube	71%	80%▲	77%▲	75%▲	57%▼
Instagram	50%	68%▲	62%▲	51%	28%▼
TikTok	42%	67%▲	53%▲	45%	17%▼
Facebook	77%	62%▼	80%▲	82%▲	75%
Snapchat	28%	60%▲	38%▲	22%▼	6%▼
Twitter	30%	40%▲	33%▲	31%	19%▼
Pinterest	28%	31%	28%	29%	25%
Reddit	15%	23%▲	22%▲	13%	6%▼
WhatsApp	22%	22%	29%▲	23%▼	14%▼
Discord	10%	21%▲	15%▲	7%▼	2%▼

Source: Collage Group Media Survey, July 2023 (21-77 population), weighted data
Multiselect, Original question: *Do you use any of these social media platforms?*
Significance test: Confidence level 95%. ▲▼ over/under Total Pop.

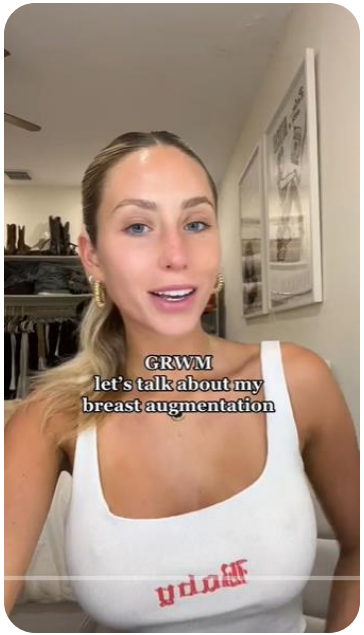
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Compared to older generations, LDA Gen Z uses social media in two unique ways

Minimal Curation



Radical Honesty



Source: PI.FYI, TikTok @alixearle

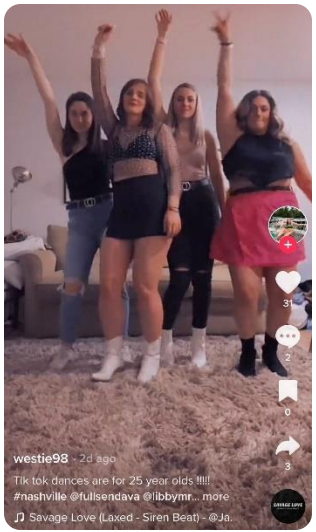
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Minimal Curation: for these digital natives, being themselves online is second nature

“Most of my decisions in life are motivated by a desire for enjoyment or fun”

67% ▲ of Gen Z vs. 53% of Total Pop. [1]



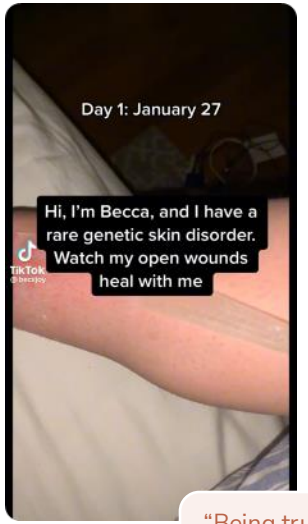


LDA Gen Z is shifting social media away from curated posts towards **more honest, fun self-expression**.

This is in part thanks to the nature of YouTube and TikTok, which Gen Z considers the most “fun” platforms. Roughly half of Gen Z users have increased their usage of TikTok and YouTube in the last year (52%, 46%). [2]

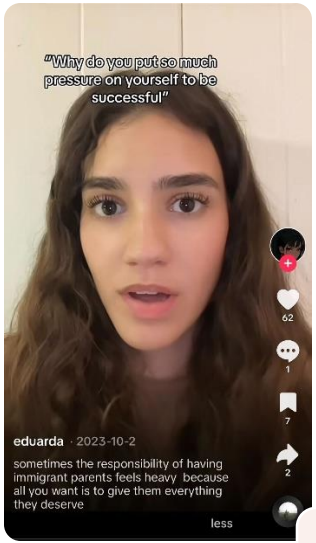
Source: [1]Collage Group Cultural Traits Survey, January 2024 (21-78 population) weighted data, % agree, strongly agree
[2] Collage Group Media Survey, July 2023 (21-77 respondents who use a given social media platform), weighted data
% Using more than last year, Original question: *How has your usage of the following platforms changed over the last year?*
Significance test: Confidence level 95%. ▲▼ over/under Total Pop.

Radical Honesty: LDA Gen Z's unique ability to be raw and vulnerable online opens doors for building authentic connection and community





"Being true to yourself, **not hiding behind a facade.**"
- AGE 22





"Being authentic means to **be true to yourself** about what you do or say"
- AGE 21



Source: Collage Group Cultural Traits Study, February 2022 (21-76 population)
Open-end: "What does being "authentic" mean to you?"

21+ Gen Z will reward brands for celebrating individuality with diverse representation and challenging stereotypes

I'm more likely to buy products or services from brands/companies that do the following in their advertisements...

▲▼ Significantly over/under Total Population. Confidence level 95%

	Total Pop.	Gen Z	Millennial	Gen X	Boomer
Show people...					
with their natural skin *(wrinkles, acne, skin conditions, etc.)*	32%	43%▲	38%▲	31%	24%▼
without retouching or photoshopping	30%	43%▲	36%▲	26%▼	22%▼
with their natural hair	25%	36%▲	29%▲	22%	17%▼
Challenge _____ stereotypes					
racial and ethnic	22%	29%▲	26%	22%	15%▼
age and generational	22%	29%▲	27%▲	19%▼	18%▼
gender	16%	25%▲	21%▲	13%▼	10%▼

Source: Collage Group America Now Survey, August 2023, (21-77 population), weighted data
Multiselect

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Celebrate Gen Z's self-expression and help them fit in by standing out

Starface empowers Gen Z to embrace and express themselves wholeheartedly.

Diverse and open-minded Gen Z prizes individuality in themselves—and others. Starface's new campaign "Skincare Meets Self-Expression" demonstrates people instead of being embarrassed, embracing their acne and skin care journey for what it is. They wear their pimple patches with pride as they do their unique style.

The campaign appeals to 21+ Gen Z's Group Trait of **Collective Individuality** by creating acceptance around uniqueness. The brand shows how their products **fit** Gen Z's bold self-expression.



Starface, "Skincare Meets Self-Expression"

Source: Starface

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21+ GEN Z GROUP TRAITS

Game-Changing

It’s Up to Us

In their short lifetime, Gen Z has witnessed a turbulent world of economic, political, environmental, and social crises. But this empowered segment hasn’t let these crises lead to hopelessness. Instead, these disasters motivate—and necessitate—change. Gen Zers **believe in their ability** to impact the world and tend to **focus on the future** as an antidote to the harsh realities they’ve come of age in. Rejecting the status quo, American Gen Zers welcome **innovative** solutions to make their vision a reality.

FUTURE-FOCUS

SELF-ASSURED

INNOVATIVE



Source: Collage Group 2024

GAME-CHANGING GROUP TRAIT

21+ Gen Z has their sights set on making change happen

Future-Focus

77% ▲

"I think a lot about what my life will look like in the future"

Innovative

73% ▲

"I like to experiment with new ideas and solutions"

Self-Assured

75% ▲

"I will do great things in life"

RANK (out of 75)

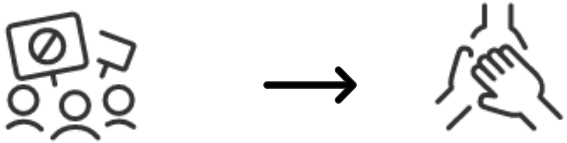
Gen Z	vs. Non-Gen Z	Gen Z	vs. Non-Gen Z	Gen Z	vs. Non-Gen Z
#7	+15	#13	+16	#10	+24

Source: Collage Group Cultural Traits Survey, January 2024 (21-78 population), weighted data
% agree, strongly agree
▲▼ Significantly over/under Non-Gen Z. Confidence level 95%

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Grave circumstances have prompted Gen Z towards an action-oriented attitude

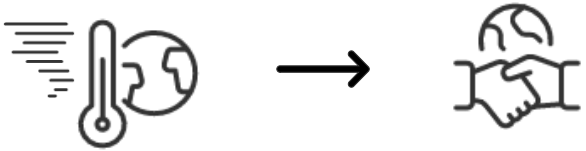
21+ Gen Z recognizes these current threats as more existential than older Americans do



Protests and social unrest → Gen Z activism



COVID-19 pandemic recession, children of the 2008 Great Recession → Gen Z fiscal responsibility and creative income



Extreme weather and global warming → Gen Z climate action

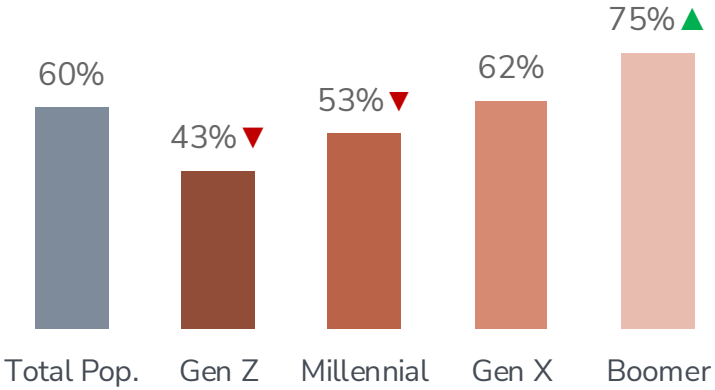


Social media comparison → Gen Z mental health destigmatization and self-care

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Further, LDA Gen Z feels distinctly disconnected to the current version of America, motivating them to make change that aligns with their values

I feel a strong personal connection with America



56%▲

of 21+ Gen Z say they're always looking for opportunities to support social causes they care about

Total	Millennial	Gen X	Boomer
49%	54%▲	48%	41%▼

Source: Collage Group Cultural Traits Survey, January 2024 (21-78 population), weighted data
% agree, strongly agree
Significance test: Confidence level 95%. ▲▼ over/under Total Pop.

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They show up with boots-on-the-ground action, at the polls and online, determined to make their voices heard



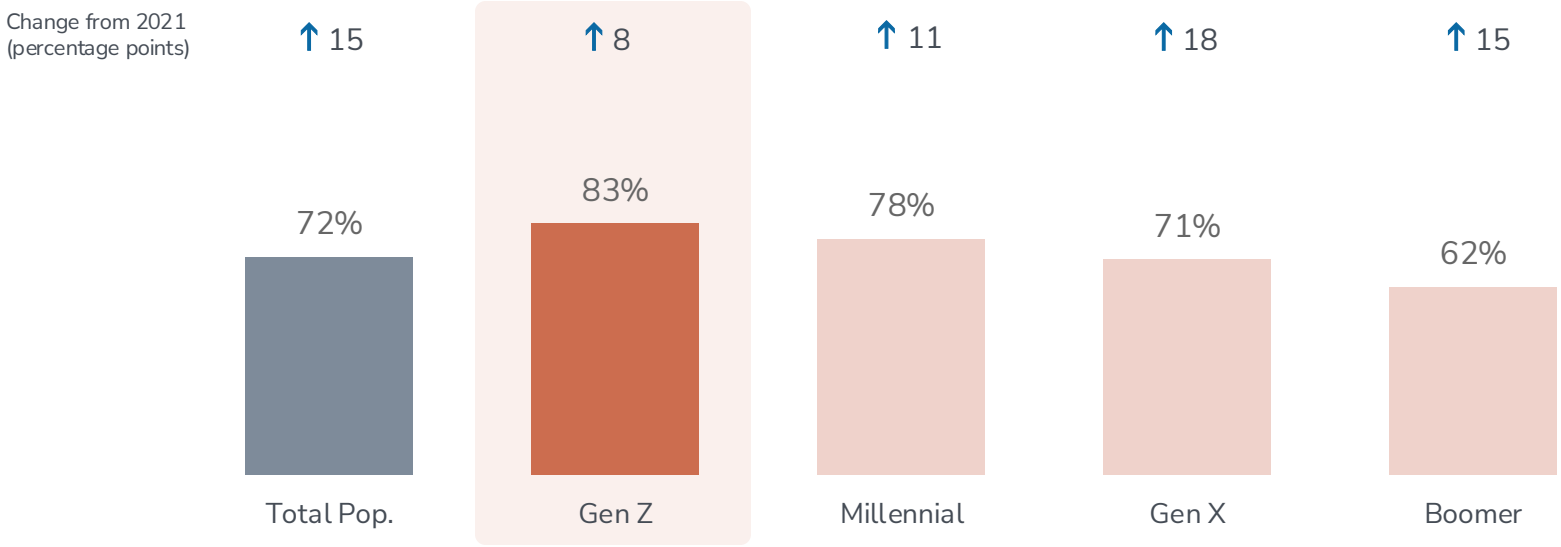


Source: UMass Lowell, Teen Vogue, Fortune

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And 21+ Gen Z increasingly expects the same bold activism from brands

% of respondents who think brands/companies should be involved in social and political issues in some aspect



Source: Collage Group America Now Survey, September 2021 (21-75 population), weighted data
Collage Group Health & Wellness Survey, October 2023 (21-77 population), weighted data
Single-select answer options

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They will reward or punish brands in accordance with their values

Non-action is riskier for brands with younger consumers

% that _____ because of their stance on a political or social issue that is important to them in the past year

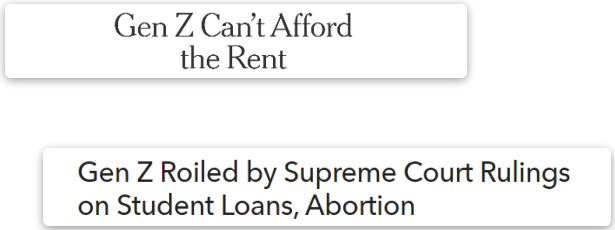
	Total	Gen Z
Started buying from a brand	23%	35% ▲
Stopped buying from a brand	25%	33% ▲

Source: Collage Group America Now Survey, August 2023 (21-77 population)
% agree
Significance test: Confidence level 95%. ▲▼ over/under Total Pop.

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Mental health, sexism, and preventing discrimination are key issues where LDA Gen Z expects brand activism

Issues Gen Z thinks brands SHOULD speak up on:



58% ▲	Preventing discrimination against lesbian, gay, and bisexual people
57% ▲	Protecting access to birth control and contraceptives
57% ▲	Supporting immigrants and refugees to the U.S.
57% ▲	Protecting access to abortions
56% ▲	Preventing discrimination of transgender and non-binary people
54% ▲	Forgiving student loan debt
51% ▲	Ending mass incarceration

Source: Collage Group America Now Survey, August 2023 (21-77 population), weighted data
Top 2 box %; Original question: How do you think brands should respond to the following issues with 1 meaning brands SHOULDN'T speak up and 5 meaning they SHOULD speak up?
Significance test: Confidence level 95%. ▲▼ over/under Total Pop.
NY Times, Bloomberg

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Prove to 21+ Gen Z that your brand is built for the future

YETI

YETI connects product durability to sustainability.

While many products today are worsening in quality in order to cut costs, YETI takes pride in durable products that are “built for generations.”

The striking out-of-home ads juxtapose everyday single-use items with YETI products you only have to buy once. This **message** matches 21+ Gen Z’s **Game-Changing** energy, while proving that their products are a perfect **fit** for both their needs and their **values**.







Sources: Paulie Dery, Chief Marketing Officer at YETI

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21+ GEN Z GROUP TRAITS

Pressured

The Problem with Perfection

Gen Z feels a greater sense of pressure than young adults have faced before. Social media plays a key role in exposing Gen Zers to new ideas, but it can also feel **overwhelming**, as though there are a million things they "should" be striving towards. With the click of a button, Gen Z sees how their life stacks up to their peers, influencers, and celebrities. These unattainable, perceived benchmarks of "success" ultimately lead to insecurity, and **social anxiety.** For Gen Z, keeping up with all of these ideals only leads to greater **internal conflict**.

SOCIALLY-ANXIOUS

OVERWHELMED

CONFLICTED



Source: Collage Group 2024

PRESSURED GROUP TRAIT

21+ Gen Z feels an immense amount of pressure—both internal and external

Socially-Anxious

65% ▲

"I get nervous talking to people I don't know"

Overwhelmed

55% ▲

"I feel like I can't keep up with all that's expected of me"

Conflicted

56% ▲

"To succeed in one area in my life I am forced to sacrifice other priorities"

RANK (out of 75)

Gen Z	vs. Non-Gen Z	Gen Z	vs. Non-Gen Z	Gen Z	vs. Non-Gen Z
34	+34	56	+13	53	+13

Source: Collage Group Cultural Traits Survey, January 2024 (21-78 population), weighted data
% agree, strongly agree
▲▼ Significantly over/under Non-Gen Z. Confidence level 95%

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The media may be new, but LDA Gen Z faces many of the same universal young adulthood pressures

50%▲

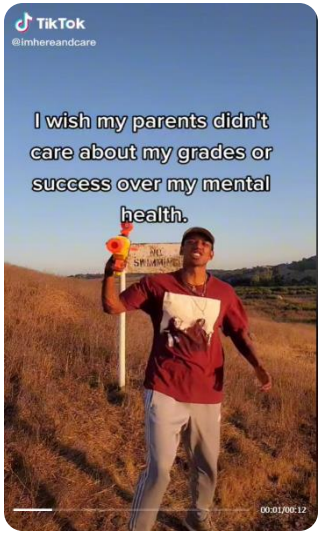
of Gen Z is **insecure**, often feeling like they're "not good enough"

compared to 37% of Total Pop.[1]

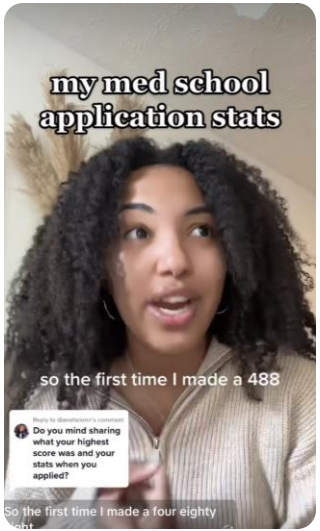
Social Pressure



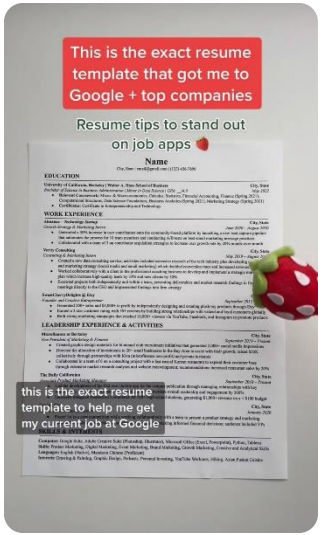
Parental Expectations



Academic Pressure



Career Success



Source: Collage Group Cultural Traits Survey, January 2024 (21-78 population) weighted data
% agree, strongly agree
▲▼ Significantly over/under Total Pop. Confidence level 95%

But these pressures are compounded by LDA Gen Z's unique societal context: technology and the "always on" internet

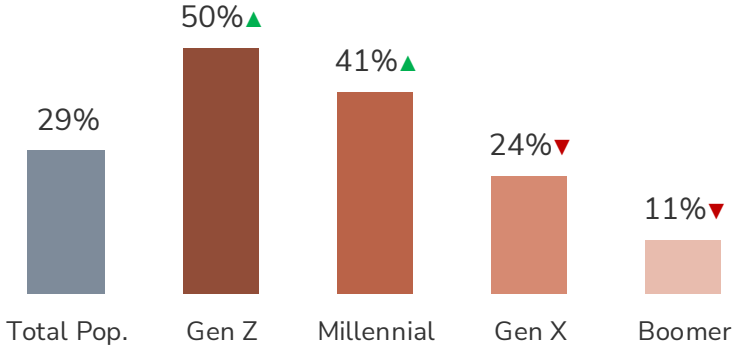
The constant comparisons available on social media amplifies Gen Z's sense of pressure

All in the palm of their hand, all the time...



- Influencers
- Consumerism
- A multitude of platforms/apps
- News
- Entertainment

I frequently compare myself to others on social media



Sources: Collage Group Health & Wellness Survey October 2023 (21-77 population), weighted data
% agree
▲▼ Significantly over/under Total Pop. Confidence level 95%

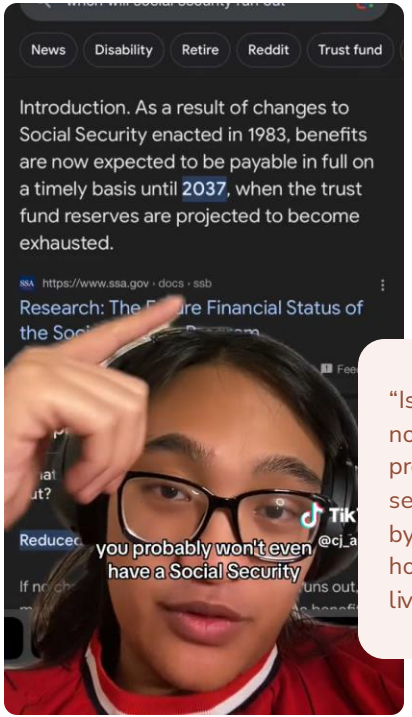
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Social media presents endless “goals” for 21+ Gen Z to achieve, yet the circumstances of Gen Z’s world make them less attainable

63% ▲

of Gen Z worries they won’t achieve all their goals in life

compared to 46% of Total Pop.[1]



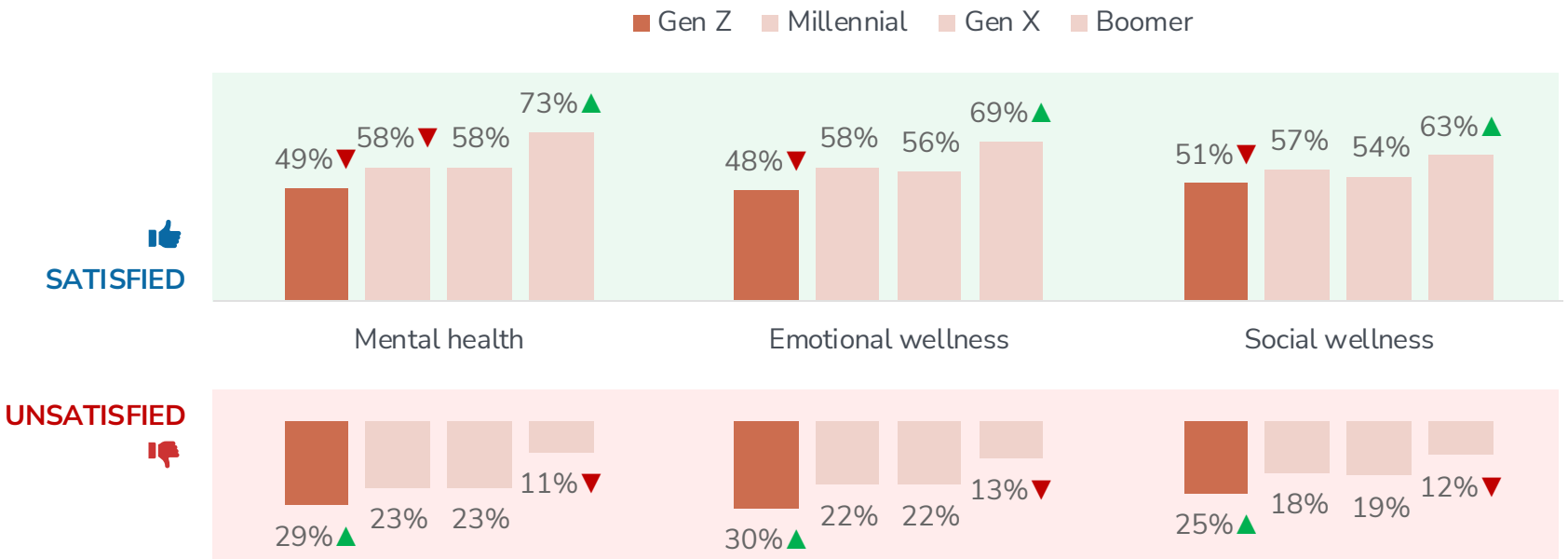
“Is any other Gen Z like terrified of not being able to retire? …You probably won’t even have social security since it might be depleted by then. All of that plus you know houses keep going up, the cost of living keeps going up.” [2]

Source: [1] Collage Group Cultural Traits Survey, January 2024 (21-78 population) weighted data
% agree, strongly agree
Significance test: Confidence level 95%. ▲▼over/under Total Pop.
[2] TikTok @cj_autism

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These pressures take a toll on 21+ Gen Z's well-being with over a quarter dissatisfied with their mental health

How satisfied or unsatisfied are you with your current state of health and wellness in the following areas?



Collage Group Health & Wellness Survey, October 2023 (21-77 population), weighted data
Single-select answer options, Satisfied = % Satisfied, Very Satisfied; Unsatisfied = % Unsatisfied, Very Unsatisfied
Significance test: Confidence level 95%. ▲▼ over/under Total

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Validate Gen Z's sense of Pressure and create outlets for self-care

Lego strives to help people de-stress.

Lego speaks to 21+ Gen Z's group trait of **Pressured** by connecting with their feelings of stress and diminishing satisfaction with their mental health. Their ongoing "Find your flow" campaign recognizes how mental health struggles can sometimes be all-encompassing. The brand positions Lego sets as a good way to unwind and relax, and find perspective on life. This **message** simultaneously connects to Gen Z's **value** of creativity.



Lego, "Find your flow"

Source: Lego

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Key Takeaways & Action Steps

KNOW THIS	DO THIS
Collective Individuality: LDA Gen Z gravitates toward their own unique qualities and the individuality of others. Counter-intuitively, this creates a shared bond for the generation.	• Toss out ideas of identity that typify older generations. Utilize specific stories and cultural nuance to resonate with 21+ Gen Z's collective celebration of individual differences. ★ **TRY THIS:** Build messaging around Gen Z's fascination with singular stories.
Game-Changing: LDA Gen Z believes in their ability to impact the world, and they focus on the future as an antidote to the harsh realities of today.	• **Be future-focused** and highlight how your brand and company are investing in the future now. ★ **TRY THIS:** Externally promote internal company policies and practices that 21+ Gen Z cares about with the same vigor as product-based messaging.
Pressured: LDA Gen Z has set a high bar for themselves, and the scourge of comparison on social media only magnifies this pressure to meet their own ideals.	• Rescue 21+ Gen Z from the comparison dilemma by pulling back the curtain on what they idealize online. Promote low-fi options for connection that are a balm to the pressures of social media.

Source: Collage Group 2024

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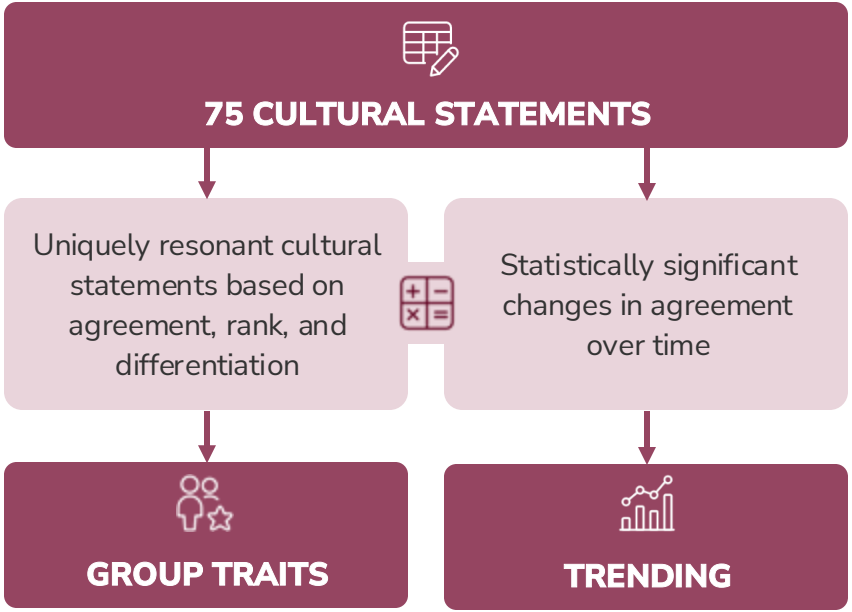
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Appendix



Collage Group's Cultural Traits Methodology

- **75 focused, culturally significant** agreement scale questions are fielded to targeted sample survey (~4,000 consumers).
- Data is analyzed based on **agreement, rank, and differentiation** for a target consumer group versus the appropriate comparison group.
- Uniquely resonant cultural statements are thematically sorted into **Group Traits** based on data and contextual importance.
- Statistically significant changes in agreement over time are assessed to identify **trending** Cultural Statements and Group Traits.



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