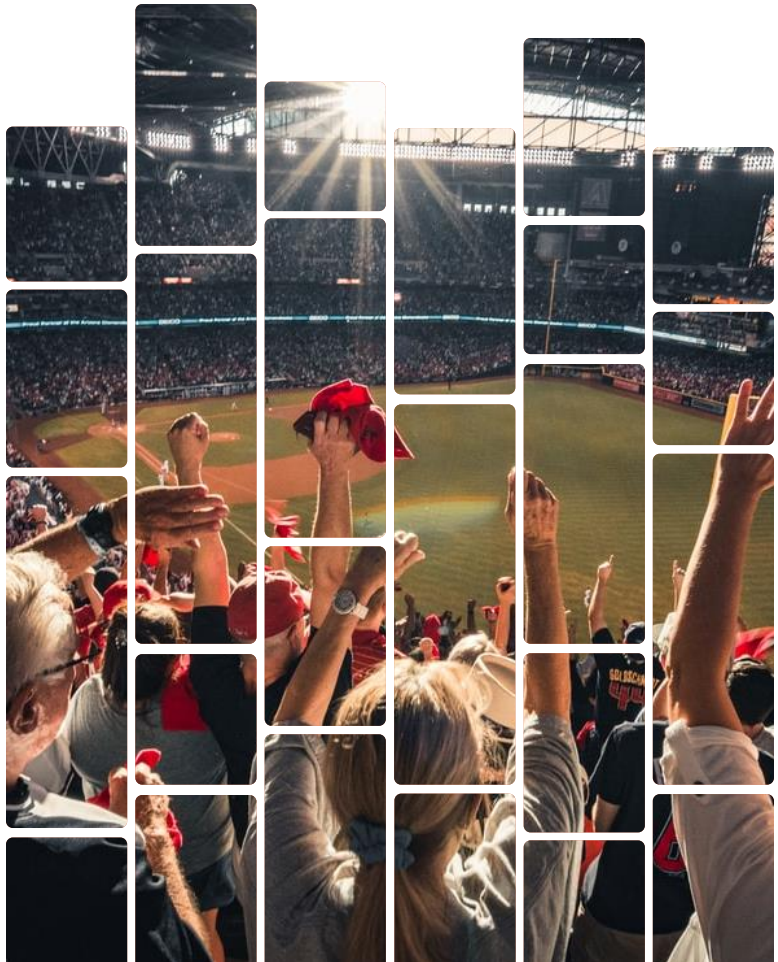
COLLAGE
GENERATIONS

Generations Passion Points

Unlocking consumer enthusiasm through Americans' favorite pastimes



Summer 2024

Collage Group Passion Points Survey 2024

Fielded April 2024 | 13-78 unweighted survey sample breakdown, n=5,078

Race/Ethnicity	
Hispanic	1,560
Black	860
Asian	1,342
White	1,252

Gender	
Woman	2,562
Man	2,486
Non-binary / other	30

Generation	
Gen Z	1,185
Millennial	1,372
Gen X	1,197
Boomer	1,324

Hispanic Identity	
U.S. Leaning *(Acculturated)*	481
Bicultural	693
Heritage Leaning *(Unacculturated)*	386

LGBTQ+	
LGBTQ+	672
Non-LGBTQ+	4,406

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

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The Big Picture

Embrace passions and interests of Americans across generations



Younger Americans seek escapism and community.

Gen Z and Millennials embrace the **foodie** lifestyle, discover themselves through heritage **travel**, and engage in **gaming** subcultures.



Midlifers reshape passions to fit family life.

Millennials and Gen X seek adventurous flavors - while dining at home, explore the world – but keep it domestic, and play to win – except when they let their kids win.



Older Americans embrace fun and fandom.

Gen X and Boomers fuel good times with their passions; checking off bucket list **travel** destinations and taking pride in American **sports** culture.

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Passion Points: Deep Dives

Passion Points help brands deepen consumer connection through Relevance, Memories, and Advocacy



Food and Dining



Games



Travel



Home and Garden



Sports and Fitness

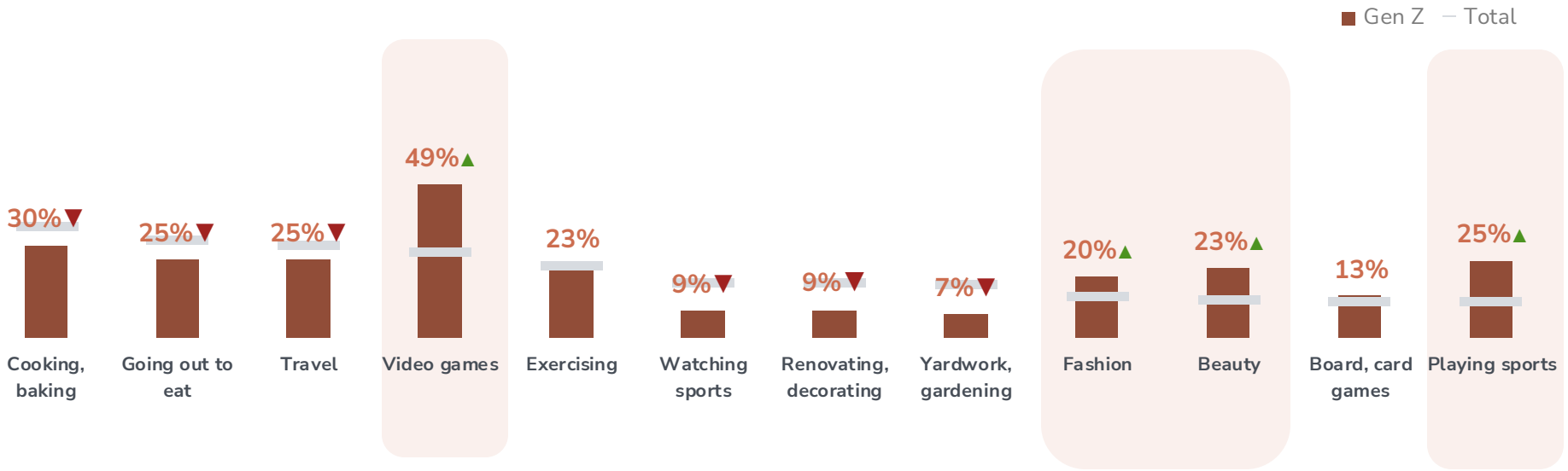


Fashion

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Gen Z fuels younger Americans' most differentiated passion points: video games, fashion, beauty, and playing sports

Gen Z Passion Points vs. Total:

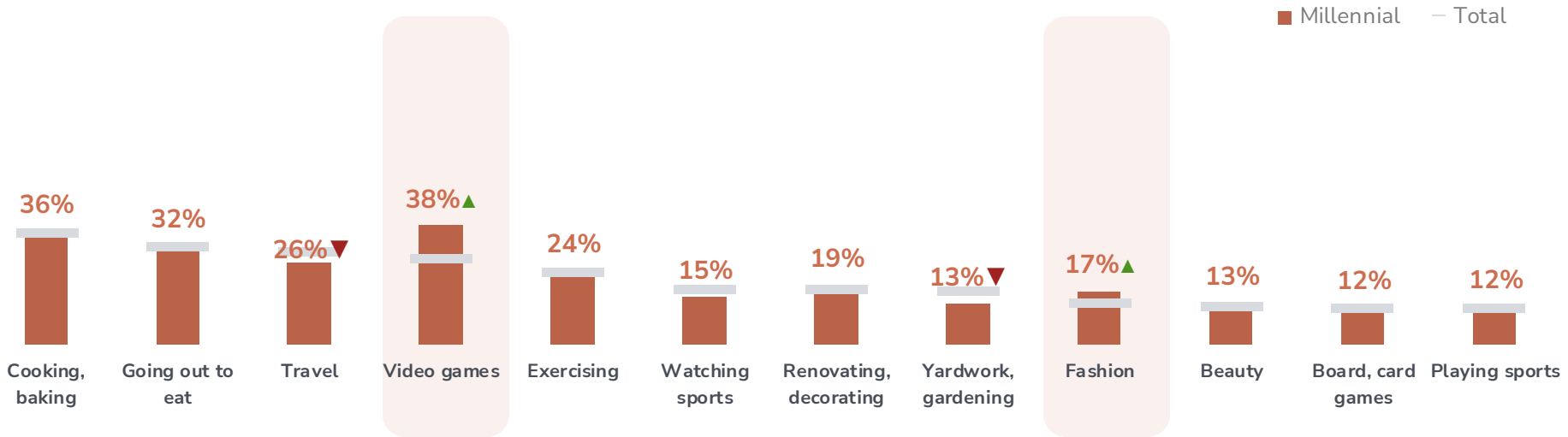


Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data, Multiselect, max 3.
Q: Which of the following are you the most interested in?
▲▼ Significantly over/under Total Population. Confidence level 95%

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Millennials follow close behind Gen Z, standing out in their passion for video games and fashion

Millennial Passion Points vs. Total:

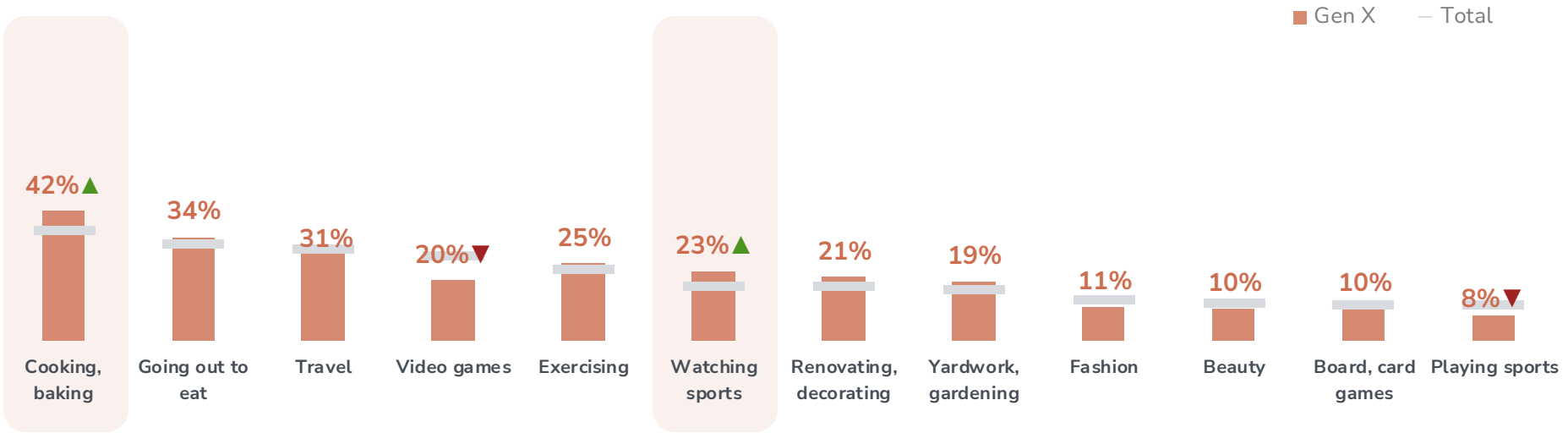


Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data, Multiselect, max 3.
Q: Which of the following are you the most interested in?
▲▼ Significantly over/under Total Population. Confidence level 95%

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Gen X is notably interested in cooking or baking and watching sports

Gen X Passion Points vs. Total:

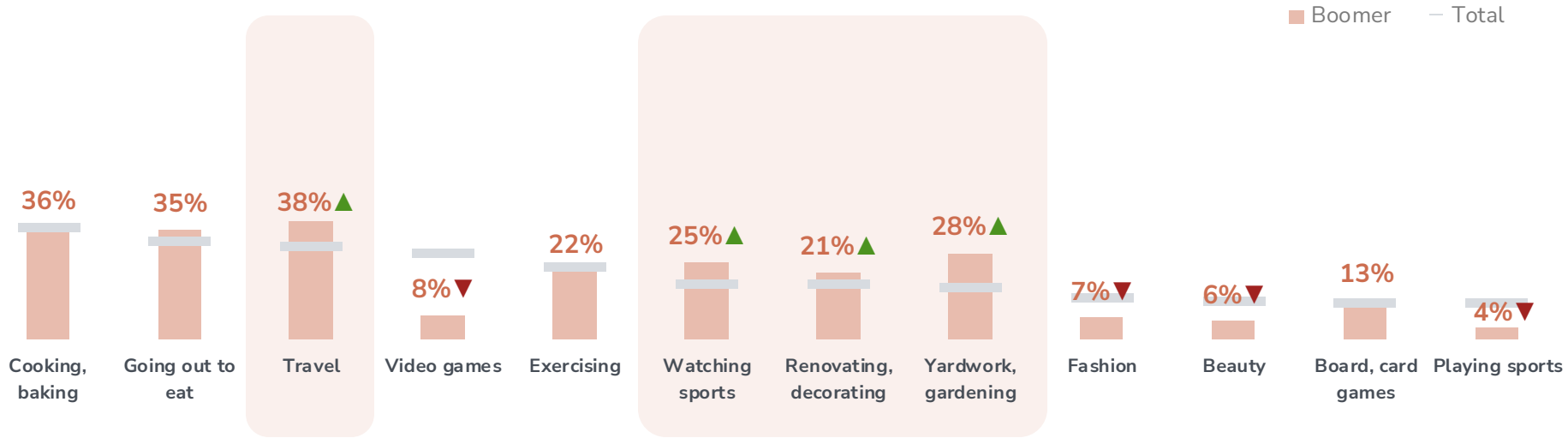


Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data, Multiselect, max 3.
Q: Which of the following are you the most interested in?
▲▼ Significantly over/under Total Population. Confidence level 95%

COLLAGE GROUP CONFIDENTIAL

Boomers are especially into home improvement, travel, and watching sports

Boomer Passion Points vs. Total:



Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data, Multiselect, max 3.
Q: Which of the following are you the most interested in?
▲▼ Significantly over/under Total Population. Confidence level 95%

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Generations Passion Points Deep Dives

Use these Deep Dives to organically and cohesively fuel brand Momentum

Especially Resonant Passion Points:

- Food and Dining
- Travel
- Games
- Watching Sports

Additional Passion Points (see Appendix for detailed data)

- Home and Garden
- Fashion
- Fitness

Source: Collage Group 2024

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1

Food and Dining

A bridge across generations and cultures

2

Travel

Travel is universally loved, but midlife **Millennials** and **Gen Xers** are reorienting it to family

3

Video Games

Gaming is an escapist and social activity for **Gen Z** and **Millennials**

4

Watching Sports

Sports are point of American pride and connection for **Gen X** and **Boomers**

Home and Garden, Fitness, and Fashion

Dive into additional Generations Passion Points

1

Food and Dining

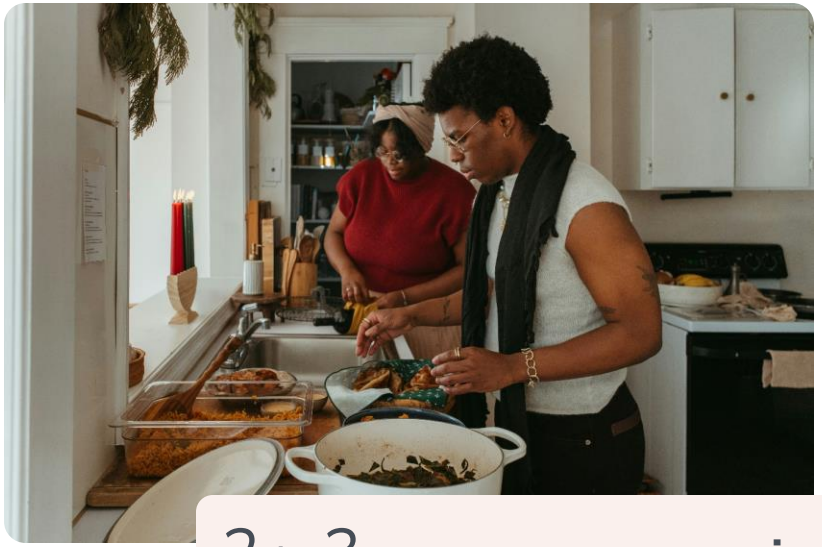
A bridge across generations and cultures



Most Americans love cooking and baking, driven by strong memories with food

68% of Americans “like” or “love” **cooking** and/or **baking**.[1]

Gen Z	Millennial	Gen X	Boomer
71%	72% ▲	69%	58% ▼



2 in 3 Americans have **memories** associated with food, especially **Millennials** (71%).[2]

Source: [1] Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data; Single-select % like, love
[2] Collage Group Category Essentials Fall 2023 (18-77 respondents), weighted data; Single select % agree, strongly agree
▲▼ Significantly over/under Total Population. Confidence level 95%

But cross-generational motivations differ

Gen Z and Millennials appreciate the creativity; Gen X and Boomers focus on financial and health benefits

I like to cook and/or bake because it helps me...

	Total	Gen Z	Millennial	Gen X	Boomer
Be creative	57%	60%	58%	55%	56%
Relax	48%	51%	48%	50%	40%▼
Save money	47%	31%▼	48%	50%	59%▲
Be healthy	42%	28%▼	42%	46%	51%▲
Show people I care	39%	29%▼	44%▲	43%	39%
Connect with my family's culture	29%	21%▼	34%▲	33%	26%

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents who like or love to cook/bake), weighted data
Multiselect
▲▼ Significantly over/under Total Population. Confidence level 95%

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Older Americans' preference for at-home meals is driven not only by finances and health, but a desire for family bonding, too

*I prefer to **make food and eat at home**, over eating out at a restaurant.*[1]





81% of **Parents** of kids under 18 say it's important that they eat together with their child(ren) as a family.[2]

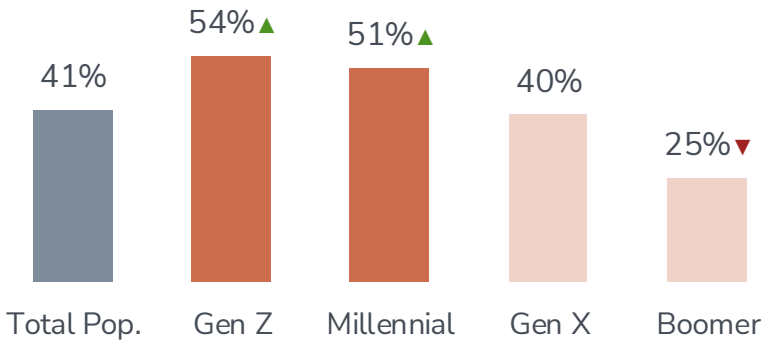
Source: [1] Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data; Forced choice ("I prefer to make food and eat at home" vs. "I prefer to eat out at a restaurant")
[2] Collage Group CultureRate:Ad survey, June 2024 (18-78 parents of kids under 18); % agree, strongly agree
▲▼ Significantly over/under Total Population. Confidence level 95%

For many Younger Americans, loving food is part of their identity

Personality is a top identifying attribute among younger Americans, especially Gen Z and Millennials.[1]

Gen Z	60% ▲
Millennial	50%
Gen X	47%
Boomer	38% ▼

*I consider myself a "**foodie**"*[2]



Source: [1] Collage Group America Now Survey, August 2023, (13-77 population), weighted data; Multiselect, max. 3 (original question: "Which 3 aspects of your identity would you most likely use to describe yourself?")
[2] Collage Group Category Essentials Spring 2024 (18-78 population), weighted data; Single select % agree, strongly agree
▲▼ Significantly over/under Total Population. Confidence level 95%

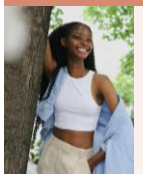
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Gen Z's Collective Individuality and Millennials' Worldly Group Traits underly their eagerness for new food experiences and flavors

GROUP TRAITS

Gen Z

COLLECTIVE INDIVIDUALITY



Gen Z is unified in their **uniqueness**, eager to express themselves creatively while also embracing others' differences.

Millennial

WORLDLY



Millennials are cultural omnivores, open-minded towards a vast array of lifestyles. They seek **experiences** to feed their hunger for learning.

	Gen Z	Millennial	Gen X	Boomer
I like to **discover new restaurants** to try[1]	63%	69%▲	66%	52%▼
I like to **try new items** that are offered at my favorite fast food/ quick service restaurants[2]	51%	56%▲	51%▲	31%▼
I enjoy foods/dishes with **strong or bold flavors**[3]	63%	68%▲	59%	53%▼
I am an **adventurous eater**[1]	51%▲	56%▲	49%	32%▼

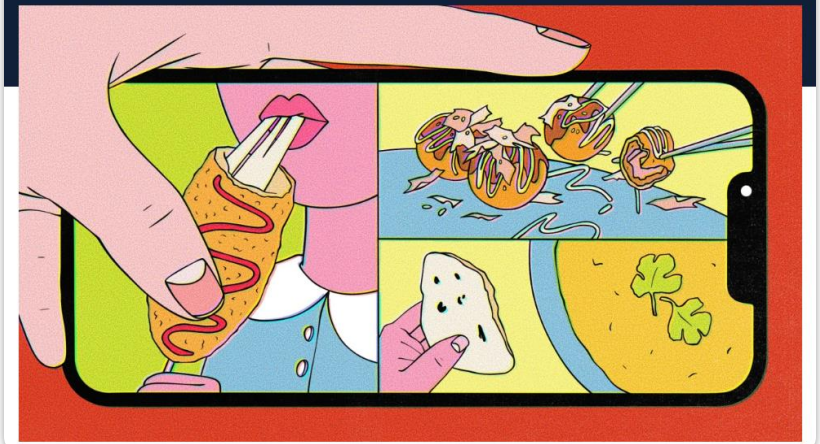
Gen Xers may be secret foodies, with their desire for experiences and adventurous flavors closely on par with Gen Z.

Source: [1] Passion Points Survey, April 2024 (13-78 respondents), weighted data; Single select % agree, strongly agree
[2] Collage Group Category Essentials Fall 2023 (18-77 respondents), weighted data; Single select % agree, strongly agree
[3] Collage Group Category Essentials Spring 2024 (18-78 respondents), weighted data; Single select % agree, strongly agree
▲▼ Significantly over/under Total Population. Confidence level 95%

Gen Z and Millennials embrace the cuisines of their heritage, driving pop culture trends like “swicy” (sweet and spicy)

How kids of immigrants made Asian food the most popular cuisines on social media

While Asian cuisines were once deemed unappetizing or exotic, experts say the children of Asian immigrants have fueled a cultural shift in how the foods of their heritage are perceived.



Why is everything suddenly ‘swicy’? Brands embrace the sweet-heat trend

From fast food to condiments and cocktails, sweet heat is showing up everywhere.



Some of the food and drink brands embracing “swiciness.” TODAY Illustration / Getty Images

Sources: NBC News. “How kids of immigrants made Asian food the most popular cuisines on social media”. May 15, 2023.
Today. “Why is everything suddenly ‘swicy’? Brands embrace the sweet-heat trend”. August 28, 2023.

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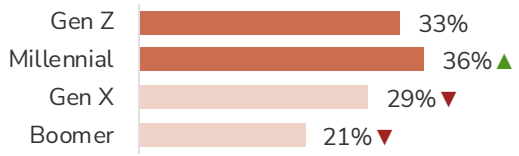
As diverse younger generations become parents, they're eager to pass on their culture and adventurous palettes to their kids, too

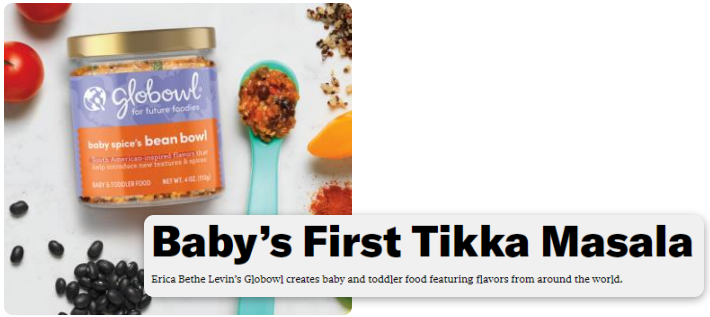
I became more interested in **maintaining my family's cultural traditions** when I became a parent.[1]





It's very important that my child(ren) **eat food from my family's cultural background.**[2]





Source: Collage Group Parents & Kids Cultural Education Survey, May 2023 (18-77 parents with kids under 18); weighted data
[1] % agree, strongly agree
[2] % very important (Original question: "How important is it that your child(ren) do the following:" "Eat food from my family's cultural background") (Other answer options: "Somewhat important", "Not important")
▲▼ Significantly over/under Total Parents. Confidence level 95%

Key Takeaways & Action Steps

KNOW THIS	DO THIS
Gen Z and Millennials view food as an extension of their personality, identifying as “foodies”. **Gen Z’s Collective Individuality** and **Millennials’ Worldly Group Traits** underly their eagerness for new food experiences and flavors. But **Gen Xers**, too, may be *secret foodies* who also enjoy novel culinary experiences – despite not identifying with the title.	• **Innovate your menu and flavor options** on a continuous basis to feed consumers’ hunger for new experiences. Look to cultural cuisines and pop culture trends for inspiration.
Inherently diverse younger generations embrace the cuisines of both their own heritage and other cultures. As Gen Z and Millennials become **parents**, they’re using food as a tool to maintain their culture and pass it onto their children.	• **Emphasize your brand’s cultural heritage** or how it can **contribute to cultural dishes**. • Recognize the **importance of culturally specific foods in the family meal space** and create simple options with diverse flavor profiles to meet the needs of busy parents.

Log into **fluen.ci** today to see how your brand performs with Americans across generations and other consumer segments across all dimensions of brand cultural fluency, including **Fit**, **Relevance**, **Memories**, **Values**, **Trust**, **Advocacy**, and “On the Rise” **Momentum**.

Source: Collage Group 2024

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Innovate your flavors to feed consumers' desire for novelty

McDonald's keeps consumers coming back for more with continuous flavor updates inspired by changing tastes and pop culture.

Americans are becoming more diverse—*and* more embracing of other cultures. With changing demographics come evolving tastes as well, whether it be food or media. McDonald's taps into this trend through recurring collaborations leaning into anime, a favorite among Gen Z, generating **Momentum**. The campaigns have each debuted new Asian-inspired sauce flavors, too, fitting with younger gens' interest in "swicy" (sweet & spicy) flavor profiles.

Feb. 2024: WcDonald's; Savory Chili Sauce





July 2024: "JUJUTSU KAISEN"; Special Grade Garlic Sauce



Sources: McDonald's, "Welcome to WcDonald's: McDonald's Brings Anime Fans' Favorite Fictional Restaurant to Life", February 21, 2024.
McDonald's, "McDonald's Teams Up with Hit Anime Series JUJUTSU KAISEN to Unleash New App Exclusive Special Grade Garlic Sauce", July 2, 2024.

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2

Travel

Travel is universally loved, but midlife **Millennials** and **Gen Xers** are reorienting it to family



Americans share a universal love for travel

73% of Americans “like” or “love” **traveling**.

Gen Z	Millennial	Gen X	Boomer
76%	74%	73%	70%



Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Single-select % like, love
▲▼ Significantly over/under Total Population. Confidence level 95%

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Everyone wants to get away to relax, especially Gen Xers

Boomers go to see specific people or places, while younger gens go for the “vibe”

Which of the following best describe why you like to (or want to) travel?

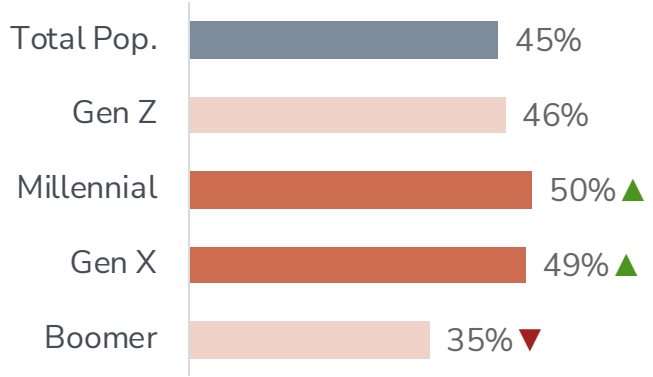
	Total	Gen Z	Millennial	Gen X	Boomer
Get a break/relax	65%	65%	66%	69%▲	60%▼
Visit friends or family	50%	47%	48%	49%	56%▲
Experience the food	49%	55%▲	54%▲	48%	40%▼
Experience a different geography	44%	39%▼	46%	43%	46%
Visit famous/popular places	43%	44%	41%	43%	45%
Visit historically significant places	41%	33%▼	36%▼	42%	50%▲
Learn about different cultures/lifestyles	40%	40%	41%	41%	37%
Get out of my comfort zone	35%	43%▲	43%▲	35%	20%▼
Connect with my family’s heritage	23%	23%	25%	23%	22%

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Multiselect
▲▼ Significantly over/under Total Population. Confidence level 95%

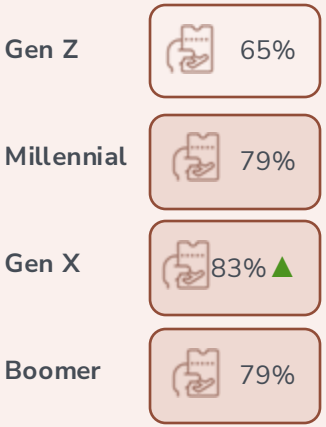
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Busy Millennials and Gen Xers, eager for a break, have a constant travel mindset and are the most engaged in planning their own trips

I am always researching my next travel destination.[1]



I enjoy **making my own arrangements** for vacation rather than wanting someone else to make them.[2]



Millennials and Gen Xers, largely parents, seek customizable, kid-friendly options.

Retired Boomers have extra time to plan their own travel.

Source: [1] Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data; Single-select % agree, strongly agree
[2] Collage Group Category Essentials Spring 2024 (18-78 respondents), weighted data; Forced choice ("I enjoy making my own arrangements for vacation" vs. "I prefer someone else makes the arrangements")
▲▼ Significantly over/under Total Population. Confidence level 95%

COLLAGE GROUP CONFIDENTIAL

Preference for international travel has gone down among Gen Xers and even Worldly Millennials as they reorient travel to family life

Preference for...[1]

INTERNATIONAL TRAVEL	DOMESTIC TRAVEL
Millennial: 38% ↓11pp	Millennial: 62% ↑11pp
Gen X: 31% ↓10pp	Gen X: 69% ↑10pp

54% of **Parents** of kids under 18 are taking trips/traveling **with their kids** this summer, especially **Gen X parents** (**57%▲**).


The New York Times

Bring the Kids Along

We take our children on vacation to expose them to history, novelty and beauty.

Traveling with kids this summer? Parenting influencers weigh in on how to be prepared


The New York Times

Taking Off From School to Take In the World

Vacationing during the off-season has long been considered a cost-saving boon. But can families with school-aged children take advantage? Should they?

Source: [1] Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data; Forced choice ("I would rather travel internationally" vs. "I would rather travel domestically in the U.S.")
[2] Collage Group Parents & Kids Holidays & Occasions Survey, April 2024 (parents of kids under 18), weighted data; Multiselect
▲▼ Significantly over/under Total Population. Confidence level 95%
↑↓ Change from 2021 (percentage points)

COLLAGE GROUP CONFIDENTIAL

But heritage travel is still a bucket list item for many, especially Millennials

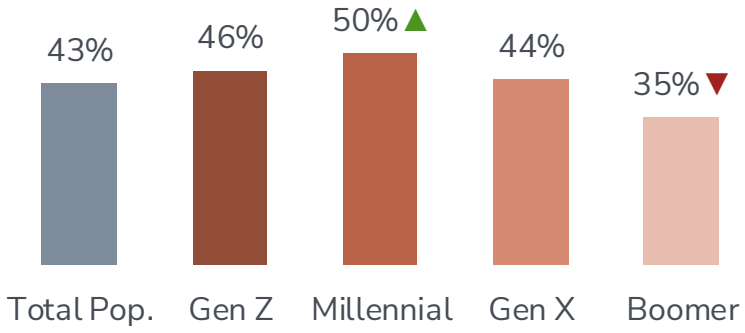
Gen Z's Collective Individuality helps drive their interest in their own culture and others' cultures, too

60% ▲

of Gen Z would rather **travel internationally** over domestically in the U.S.

compared to 37% of Total Pop. [1]

Traveling to the places that are tied to my cultural heritage is important to me.[2]

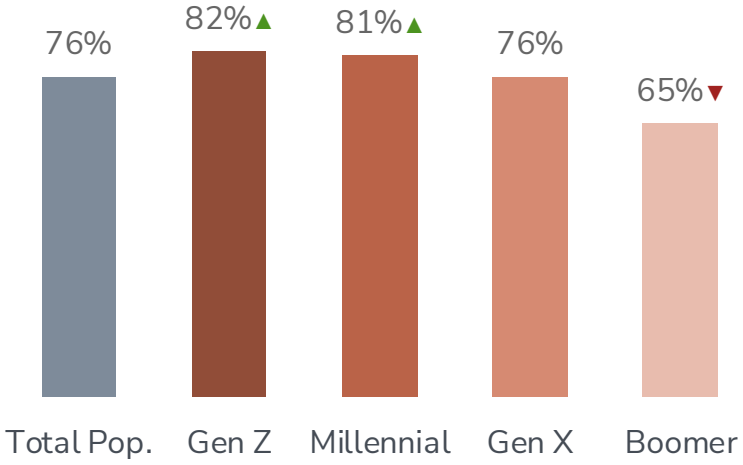


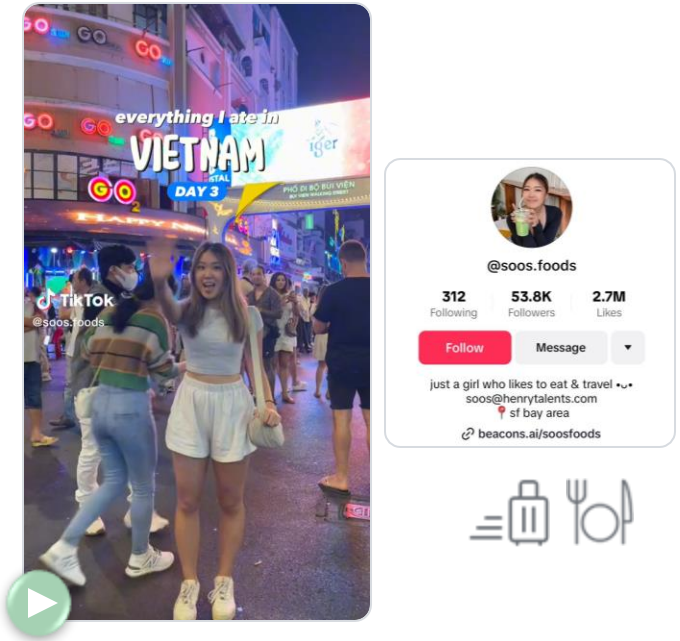
Source: Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
[1] Forced choice
[2] % agree, strongly agree
▲▼ Significantly over/under Total Population. Confidence level 95%

COLLAGE GROUP CONFIDENTIAL

Adventurous eating influences Younger Americans' travel destinations

% of each segment that say it's important to choose travel destinations based on the local food/cuisine:





Source: Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Single select % somewhat important, very important
▲▼ Significantly over/under Total Population. Confidence level 95%
tiktok.com/@soos.foods

COLLAGE GROUP CONFIDENTIAL

Key Takeaways & Action Steps

KNOW THIS	DO THIS
Millennials and **Gen Xers** are in their parenting life stage and reorienting travel to fit the family lifestyle. They still want to get away but their preference for international travel has decreased in recent years and, instead, they're now taking domestic road trips.	• Acknowledge the turbulence of traveling with kids and **message around family-friendly accommodations** and activities. • Provide ways for travel-loving Millennials to **scratch the "adventure" itch, without going far from home**. ★ **THINK:** staycations, cultural festival sponsorships, etc.
Heritage travel remains a bucket list item, led by **Millennials**. Local cuisine is a big draw for younger travelers, too.	• **Highlight how your brand adds cultural nuance to travel.** Showcase your brand's own heritage and contributions to culture. • **Bring authentic, international experiences closer to home** on American turf, such as through cultural cuisines or media.

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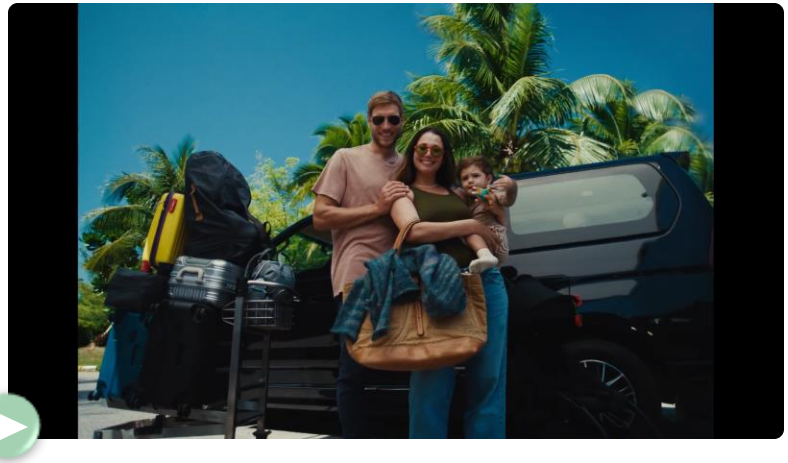
Source: Collage Group 2024

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Message around each generation's unique travel needs and desires

American Express appeals to Millennials and Gen Xers' desire to vacation with kids

Worldly Millennials aren't going to give up their travel desires now that they have children. American Express's ad emphasizes how the brand accommodates families and helps create smooth travel experiences. The brand's travel perks help to foster **Relevance** and propel **Momentum** among these family-first generations.



Source: American Express, "Three's Company", February 5, 2024.

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3

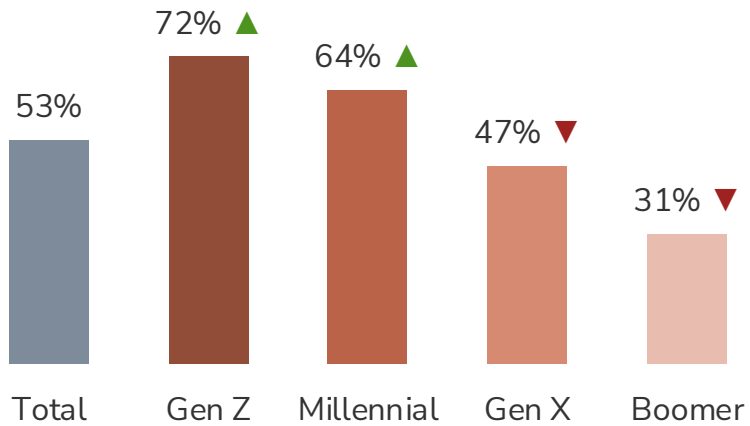
Video Games

Gaming is an escapist and social activity for **Gen Z** and **Millennials**



Younger generations are most passionate about playing video games

% of each segment that likes or loves playing video games.





Video games are Gen Z and Millennials' #1 Passion Point.

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
% like, love
▲▼ Significantly over/under Total Population. Confidence level 95%

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For many Gen Z and Millennials, gaming is part of their everyday lives

Roughly three-quarters of Gen Z play games weekly or more

How often do you play video games?

	Total	Gen Z	Millennial	Gen X	Boomer
Daily	37%	44% ▲	43% ▲	34%	25% ▼
Weekly	20%	30% ▲	22%	20%	11% ▼
Monthly	7%	8%	9%	6%	7%
Less often than monthly	9%	10%	8%	12%	8%
I don't play video games	26%	8% ▼	18% ▼	28%	49% ▲



Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Single select
▲▼ Significantly over/under Total Population. Confidence level 95%
TikTok @leocrossing

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Young people love many creative aspects of gaming, but Gen Z stands out for enjoying the sense of competition and opportunity for connection

Most of all, gaming provides an escape and break from daily life

Why do you play video games?

	Total	Gen Z	Millennial	Gen X	Boomer
To escape my normal routine	56%	46%▼	57%	63%▲	59%
For a sense of competition or challenge	37%	42%▲	38%	31%▼	36%
To connect with other people	28%	42%▲	30%	21%▼	13%▼
To do things I can't do in real life	25%	34%▲	31%▲	18%▼	12%▼
To express myself	25%	35%▲	33%▲	14%▼	10%▼
To create a new identity or story for myself, role play	19%	27%▲	26%▲	11%▼	4%▼
To customize my character	18%	28%▲	24%▲	13%▼	4%▼

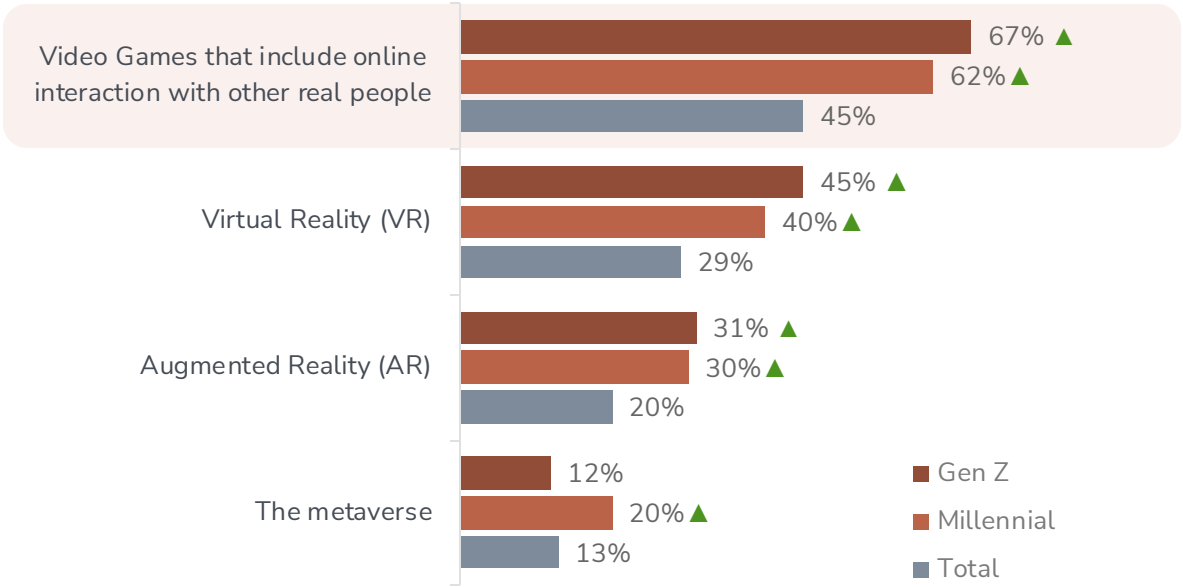
Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents who play video games), weighted data
Multiselect
▲▼ Significantly over/under Total Population. Confidence level 95%

COLLAGE GROUP CONFIDENTIAL

Younger gens especially gravitate towards social, multiplayer games

And they're more likely to try VR, AR, and metaverse games as well

What types of technology have you tried/interacted with before?





Popular multiplayer games among Gen Z and Millennials often involve teamwork, fostering discussion and thus social connection.

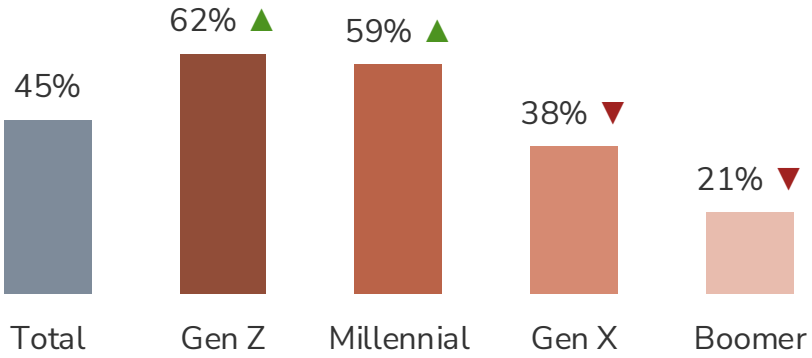
Source: Collage Group Emerging Media Survey, October 2022, 13-76 population, weighted data, Multiselect answer options

COLLAGE GROUP CONFIDENTIAL

The collaborative, dynamic nature of video games makes them a great bonding activity for younger Americans both online and in-person

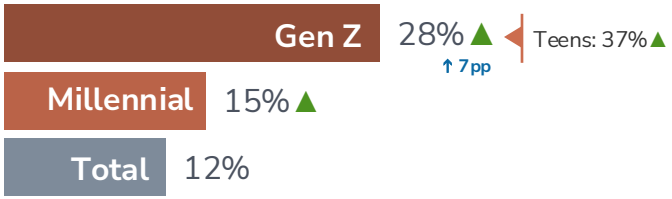
Gen Z is increasingly partaking in online gaming communities

Video games are a great way to spend time with friends and/or family[1]





Discord platform usage:



Source: [1] Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data, % agree, strongly agree
[2] Collage Group Media Survey, July 2023 (13-77 population), weighted data, Multiselect answer options, Q: Do you use any of these social media platforms?
▲▼ Significantly over/under Total Population. Confidence level 95%
↑↓ Change from 2021 (percentage points)

COLLAGE GROUP CONFIDENTIAL

Over half of Parents see video games as a fun activity to do with their kids

Given gaming's popularity with Gen Z and Gen Alpha, it is a great way to bring the family together

54%

of Parents play video games with their 8-12-year-old children for fun

Millennial Parents	Gen X Parents
57%	43%



Source: Collage Group Tweens' Free Time Survey, August 2023 (parents and their 8-12-year-old children), weighted data
Multiselect answer option
▲▼ Significantly over/under Total Parents. Confidence level 95%

COLLAGE GROUP CONFIDENTIAL

Gen Z and Millennials show an affinity for a variety of video games, shooting and action games most of all

Which of the following types of video games do you like to play?

	Total	Gen Z	Millennial	Gen X	Boomer
Puzzle or logic games	47%	30% ▼	45%	57% ▲	60% ▲
Action / Adventure games	39%	49% ▲	48% ▲	31% ▼	17% ▼
Shooting games	37%	50% ▲	45% ▲	29% ▼	13% ▼
Strategy games	35%	34%	40% ▲	33%	32%
Fighting games	29%	39% ▲	36% ▲	23% ▼	9% ▼
Sports games	26%	26%	32% ▲	26%	15% ▼
Arcade or platformer games	26%	23%	30% ▲	28%	20% ▼
Role-playing games	25%	33% ▲	35% ▲	18% ▼	7% ▼
Simulation games	24%	33% ▲	32% ▲	17% ▼	8% ▼
Massively multiplayer online games or MMOs	16%	21% ▲	23% ▲	10% ▼	3% ▼
Virtual reality games	15%	21% ▲	19% ▲	11% ▼	5% ▼
Rhythm or music games	13%	20% ▲	17% ▲	8% ▼	4% ▼







Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents who play video games), weighted data
Multiselect
▲▼ Significantly over/under Total Population. Confidence level 95%

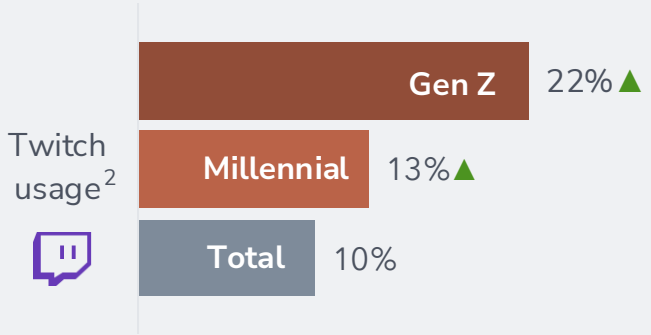
Over half of Gen Z enjoys streaming video game content as entertainment

Watching others helps improve their own game play and fuels their competitive nature

54% ▲ ↑ 8pp

of Gen Z like to **watch live streams or recordings** of other people playing video games.[1]

Total	Millennial	Gen X	Boomer
30%	38% ▲	22% ▼	8% ▼



Twitch's live and interactive features appeal to Gen Z's desire for authenticity and their **Collective Individuality** Group Trait. Livestreams spur moments of real emotion and drama. [3]

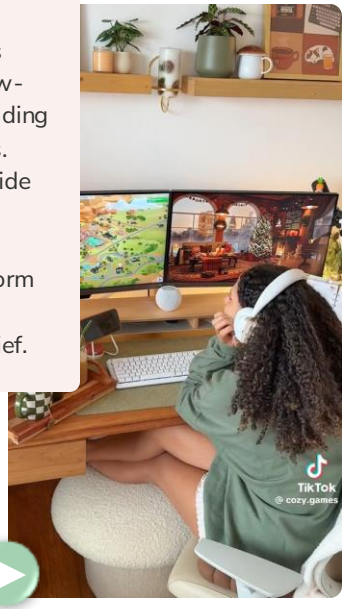
Source: [1]Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data, % agree, strongly agree
[2]Collage Group Media Survey, July 2023 (13-77 population), weighted data, Multiselect answer option Q: Do you use any of these social media platforms?
▲▼ Significantly over/under Total Population. Confidence level 95
↑↓ Change from 2022 (percentage points)
[3] The Drum

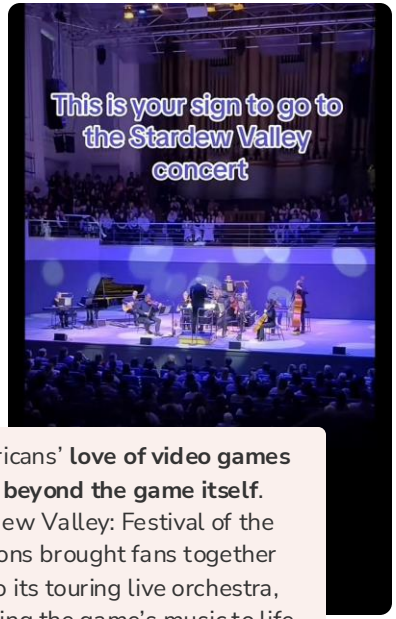
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As gaming as a hobby becomes mainstream, gaming culture seeps into the “real world”

The array of gaming worlds fosters niche trends and strong fandoms

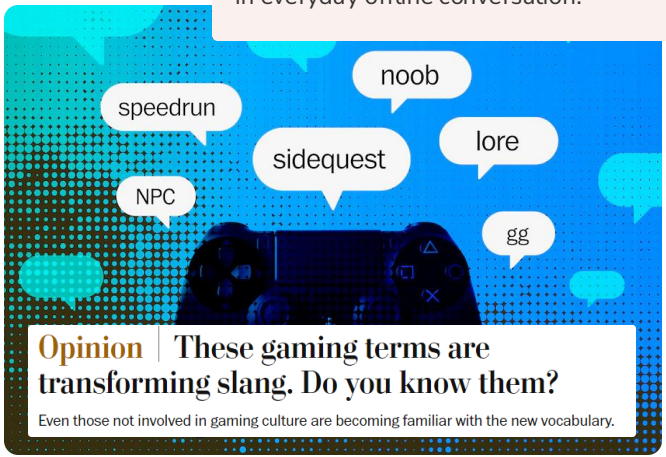
The **cozy gaming** trend emphasizes relaxation and low-stress, often including simulation games. Cozy games provide escapism and encourage self-expression as a form of self-care and mental health relief.





Americans’ **love of video games goes beyond the game itself**. Stardew Valley: Festival of the Seasons brought fans together IRL to its touring live orchestra, bringing the game’s music to life.

Terms that have origins in gaming are now becoming mainstream slang used in everyday offline conversation.

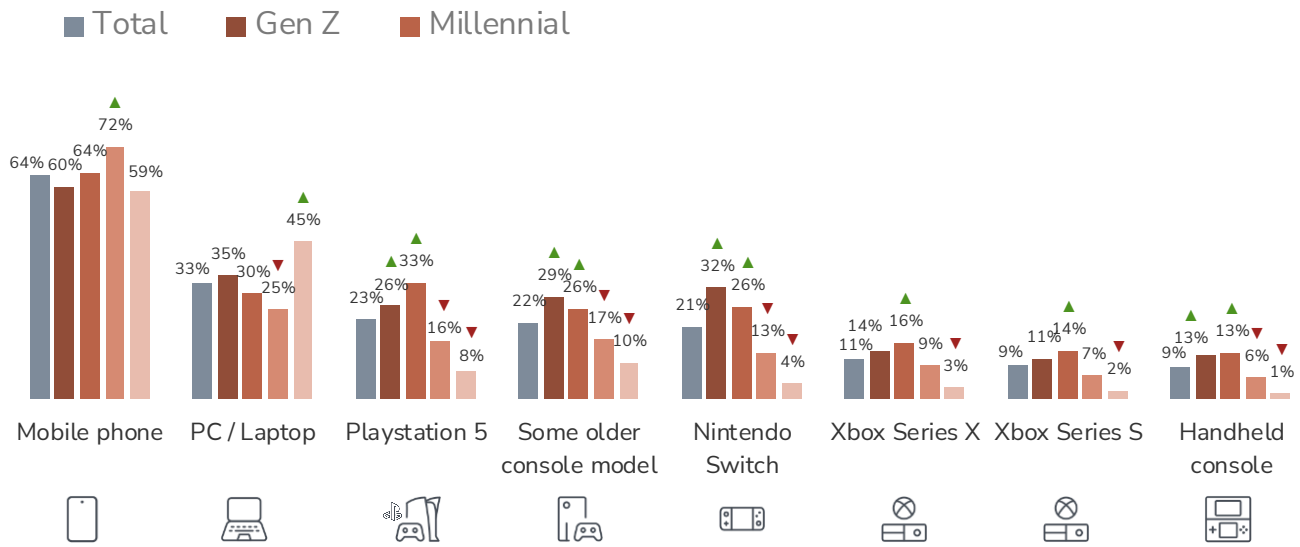


Sources: TikTok @cozy.games, https://www.nme.com/, Washington Post

COLLAGE GROUP CONFIDENTIAL

Americans most commonly play games on phones, but younger gens are more likely to also use another device

Which of the following platforms do you typically play video games on?



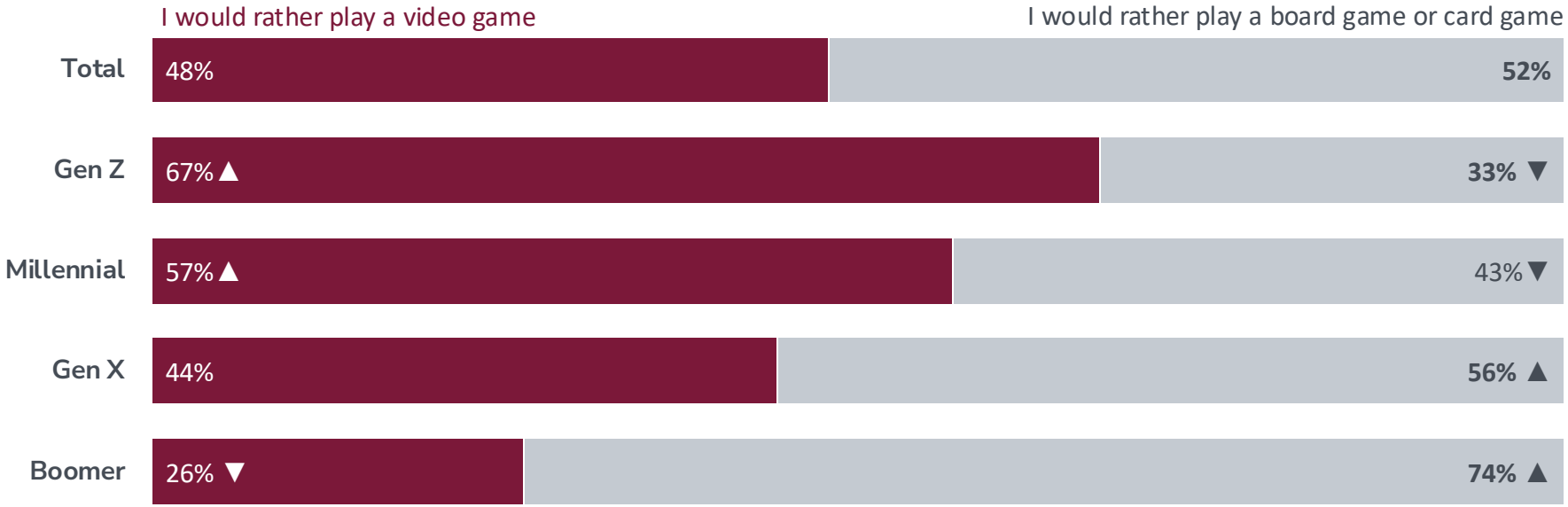
- Gen Z on average uses 2 or more types of devices.
- Popular games work across platforms for **seamless device switching** thereby **continuous social interaction**.
- Nintendo Switch fits Gen Z's **on-the-go life**, doubling as a portable device and home console.

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents who play video games), weighted data
Multiselect
▲▼ Significantly over/under Total Population. Confidence level 95%

COLLAGE GROUP CONFIDENTIAL

While younger gens prefer video games, Gen X and Boomers would rather play a board game or card game

Which of the following statements do you agree with more, even if neither is entirely correct?



Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Forced choice
▲▼ Significantly over/under Total Population. Confidence level 95%

COLLAGE GROUP CONFIDENTIAL

Gen X stands out for enjoying bingo, trivia, puzzles, and dominoes

Nearly a third of Gen Z likes playing chess

Do you enjoy any of the following activities (either physical or online versions)?

	Total	Gen Z	Millennial	Gen X	Boomer
Card games	60%	57%	61%	60%	60%
Board games	52%	53%	54%	51%	49% ▼
Word and number puzzles *(wordle, crossword, sudoku, etc.)*	43%	40%	42%	46%	44%
Bingo	37%	33% ▼	40%	42% ▲	33% ▼
Trivia	32%	28% ▼	32%	36%	33%
Jigsaw or tiling puzzles	30%	25% ▼	29%	35% ▲	32%
Dominoes	28%	23% ▼	31%	34% ▲	25% ▼
Chess	23%	32% ▲	24%	18% ▼	18% ▼

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Forced choice
▲▼ Significantly over/under Total Population. Confidence level 95%

COLLAGE GROUP CONFIDENTIAL

Tap into Americans' love of gaming with unique branded experiences

Sour Patch Kids drives Relevance with branded video gaming experiences

The candy brand appeals to Gen Z's love of gaming on two of their favorite video game platforms – Roblox and Twitch. Sour Hollows Halloween Hunt was a branded gaming experience on Roblox with elements of Obby, a highly popular genre among Roblox players. The brand also hosted a "Squad Stream" with popular Twitch gamers competing live.



Sour Hollows Halloween Hunt on Roblox

Fruit Fight Squad Stream on Twitch



Check out [Top Brands for Gen Z study](#) for more insights on Sour Patch Kids' resonance with the generation.

Source: https://marketingpartnerships.com/

COLLAGE GROUP CONFIDENTIAL

Foster Relevance among Gen Z and Millennials with interactive gaming experiences

Super Bowl LVII partners with Nickelodeon for a Roblox game experience.

The NFL launches Super Bowl special events on Roblox with football themed challenges and digital items to celebrate and bring awareness to the big game. The brands also hosted an alternate telecast of the Super Bowl game with “slime-filled” enhanced graphics and advanced augmented reality, featuring additional commentary from animated SpongeBob SquarePants and Patrick Star.



SpongeBob SquarePants Super Bowl LVIII event on Roblox

Sources: youtube.com/
https://myfox8.com

COLLAGE GROUP CONFIDENTIAL

Key Takeaways & Action Steps

KNOW THIS	DO THIS
Across generations, Americans enjoy video games to escape from their everyday routines. Younger gens especially love the creative aspects – customizing their characters and doing things they can't do in real life.	• **Message around why video games are important to each generation**. For Gen Z, connect playing video games to their emphasis on mental health by positioning gaming as a way to express themselves and unwind.
Gen Z is drawn to gaming for the competition and social connection. Socializing around games happens both in-person and online – including on social platforms like Twitch and Discord. Gaming culture has also become mainstream, fostering both large and niche communities and subcultures.	• **Sponsor online or IRL events that revolve around gaming passions** and spark interaction. ★ **TRY:** Demonstrate your brand's understanding of gaming culture by hosting a video game character drawing contest on Discord or sponsoring events at a gaming conference.

Log into **fluen.ci** today to see how your brand performs with Americans across generations and other consumer segments across all dimensions of brand cultural fluency, including **Fit**, **Relevance**, **Memories**, **Values**, **Trust**, **Advocacy**, and "On the Rise" **Momentum**.

Source: Collage Group 2024

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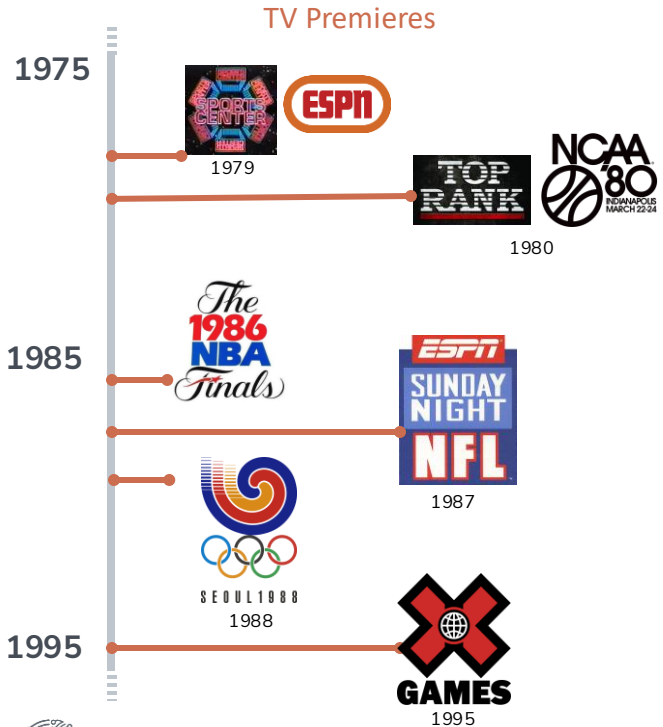
4

Watching Sports

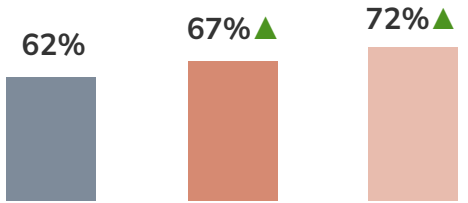
Sports are point of American pride and connection for **Gen X** and **Boomers**



Gen X and Boomers grew up during a sports television boom, and TV is still the primary way they follow sports



How do you stay informed about the sports you follow?



	Total	Gen X	Boomer
I listen to the radio	25%	25%	25%
I follow a team's social media account	24%	22%	12% ▼
I use apps that give me real-time updates	24%	28%	16% ▼
I read the newspaper	19%	21%	27% ▲
I listen to sports radio	18%	20%	17%
I go to the team website regularly	18%	20%	16%

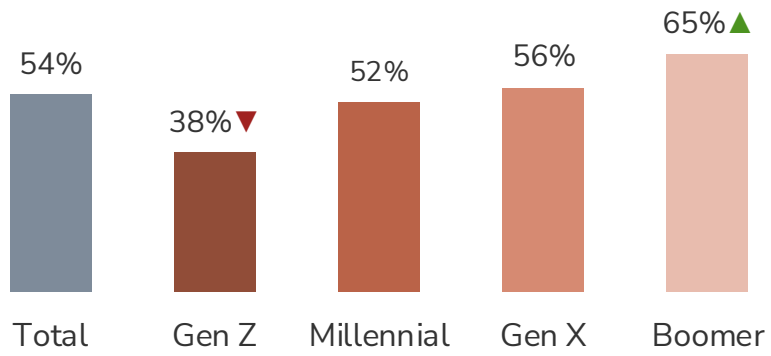
Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Multiselect answer options
▲▼ Significantly over/under Total Population. Confidence level 95%

COLLAGE GROUP CONFIDENTIAL

For many Gen X and Boomers, Live TV is a near constant

They watch the most video content daily and are especially likely to tune in live

% of Americans watch 3+ hours of video content daily
(Live TV or Streaming, including the news)





Gen X and Boomers are far more likely to watch live network or cable TV, compared to younger gens.

Source: Collage Group Media Survey, July 2023 (13-77 population), weighted data
[1] Single select
[2] Multiselect answer option
▲▼ Significantly over/under Total Population. Confidence level 95%

COLLAGE GROUP CONFIDENTIAL

And they still prefer the same major networks for sports coverage that they grew up with

Which sports media platforms do you use to consume sports?

	Total	Gen X	Boomer
ESPN	44%	44%	39% ▼
Fox Sports	34%	37% ▲	34%
NBC	32%	36% ▲	43% ▲
Fox	32%	36% ▲	32%
CBS	32%	34% ▲	43% ▲
ABC	30%	33% ▲	42% ▲



Gen X and Boomers are least likely to subscribe to sports streaming services or pay for premium sports content.

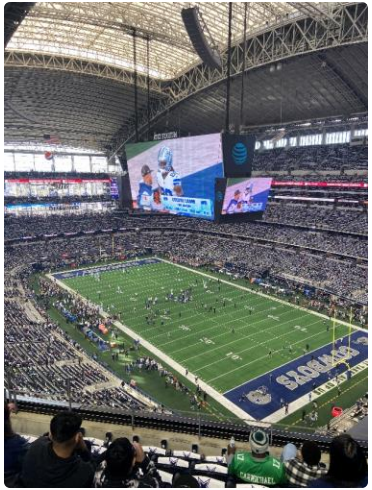
Source: Collage Group Sports Survey June 2024 (13-78 respondents), weighted data
Multiselect
▲▼ Significantly over/under Total Population. Confidence level 95%

American football is most popular and deep-rooted among older generations

Basketball is the second favorite for Gen X and Baseball for Boomers

Which of the following sports (college and/or professional) do you follow? Top 5.

		Total	Gen Z	Millennial	Gen X	Boomer
1	American Football	45%	32%▼	45%	49%▲	50%▲
2	Basketball	34%	33%	36%	33%	32%
3	Baseball / Softball	27%	19%▼	27%	28%	34%▲
4	Boxing / Wrestling / MMA	16%	15%	21%▲	16%	11%
5	Soccer	15%	19% ▲	17%	13%	12% ▼



Boomers are particularly interested in golf (13%▲) and auto racing (13%▲).

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Multiselect
▲▼ Significantly over/under Total Population. Confidence level 95%

Older gens, especially Boomers, follow their favorite sports in both college and professional arenas

What sports leagues, if any, do you follow? Top 5.

	Total	Gen Z	Millennial	Gen X	Boomer
NFL	46%	36% ▼	46%	50% ▲	50% ▲
NBA	30%	32%	33%	31%	25% ▼
Major League Baseball	26%	15% ▼	23%	26%	37% ▲
NCAA Football	23%	15% ▼	21%	27% ▲	27% ▲
NCAA Men's Basketball	19%	13% ▼	17%	21%	23% ▲



Boomers also uniquely follow NCAA Women's Basketball (12%) and PGA (10%▲). Millennials especially follow the English Premier League (10%▲) and UEFA Champions League (8%▲).

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Multiselect answer options
▲▼ Significantly over/under Total Population. Confidence level 95%

Gen X and Boomers' enthusiasm for football is connected to their American pride

They see the sport as an important component of American culture

"[Football] has grown into one of the most beloved sports on the continent. It has inspired countless books and movies about teams, players and coaches that have left an **indelible mark on American culture**... From fashion to food and even politics, we can easily see a strong presence of this popular sport." [1]

Gen X

STEWARDSHIP



Gen Xers are more likely than younger generations to long for the past, feel connected to America, and value maintaining traditions.

Boomer

AMERICANA



Boomers feel connected to the united states, view themselves as archetypal Americans, and feel nostalgic towards the past.

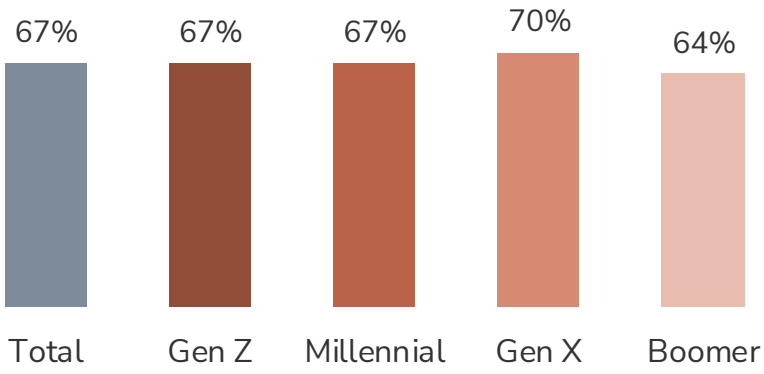
Source:[1] https://www.theintelligencer.net/
[2] Collage Group Cultural Traits Study January 2024 (13-78), weighted data

COLLAGE GROUP CONFIDENTIAL

Sports are a source of connection and community for Americans of all ages

The majority of Americans root for specific sports teams, Gen X most of all

I have a favorite sports team(s)



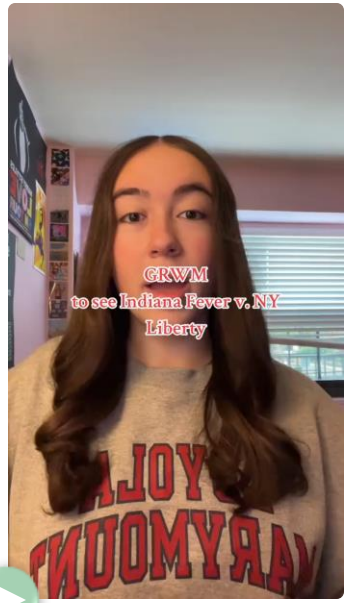
"For many people, football is more than just a game – it's a **way to connect with others and express their love for their team or country**...It has also allowed fans to socialize through discussions about the games, NFL Vegas odds and the latest news regarding the sport." [2]

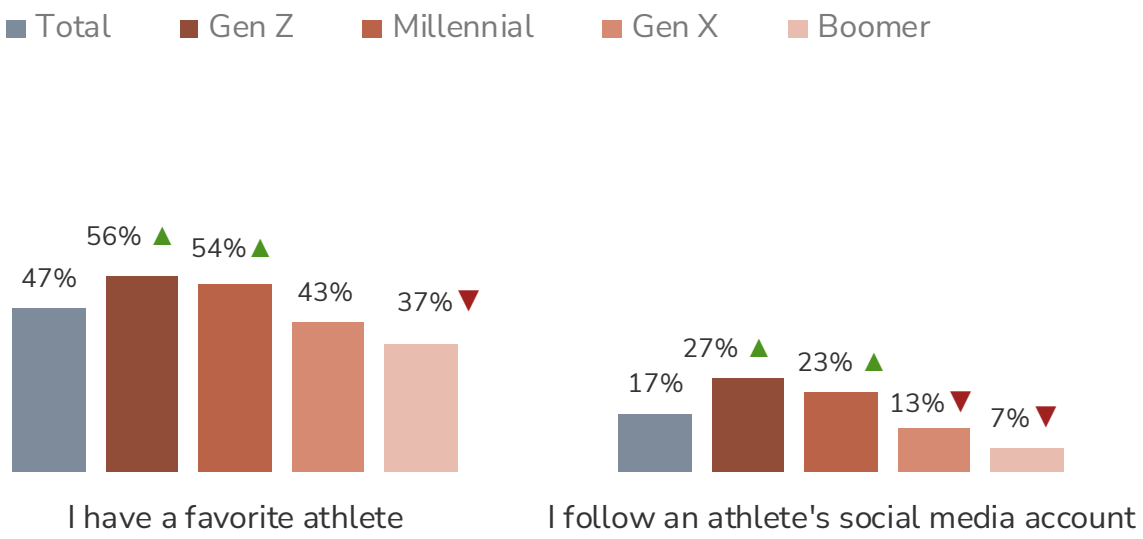
Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
% agree
▲▼ Significantly over/under Total Population. Confidence level 95%
[2] https://www.theintelligencer.net/

COLLAGE GROUP CONFIDENTIAL

Athletes’ celebrity statuses have brought new, younger audiences to sports

Social media fosters Gen Z and Millennials’ connection to specific athletes





Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
% agree
▲▼ Significantly over/under Total Population. Confidence level 95%
TikTok @rylovesuconn

Connection-Seeking Millennials lead on partaking in the social aspects of watching sports

50% ▲

of Millennials like to **host or attend sports-watching parties**

Total	Gen Z	Gen X	Boomer
40%	45% ▲	43%	24% ▼

50% ▲

of Millennials enjoy **going to sports bars to watch games or matches**

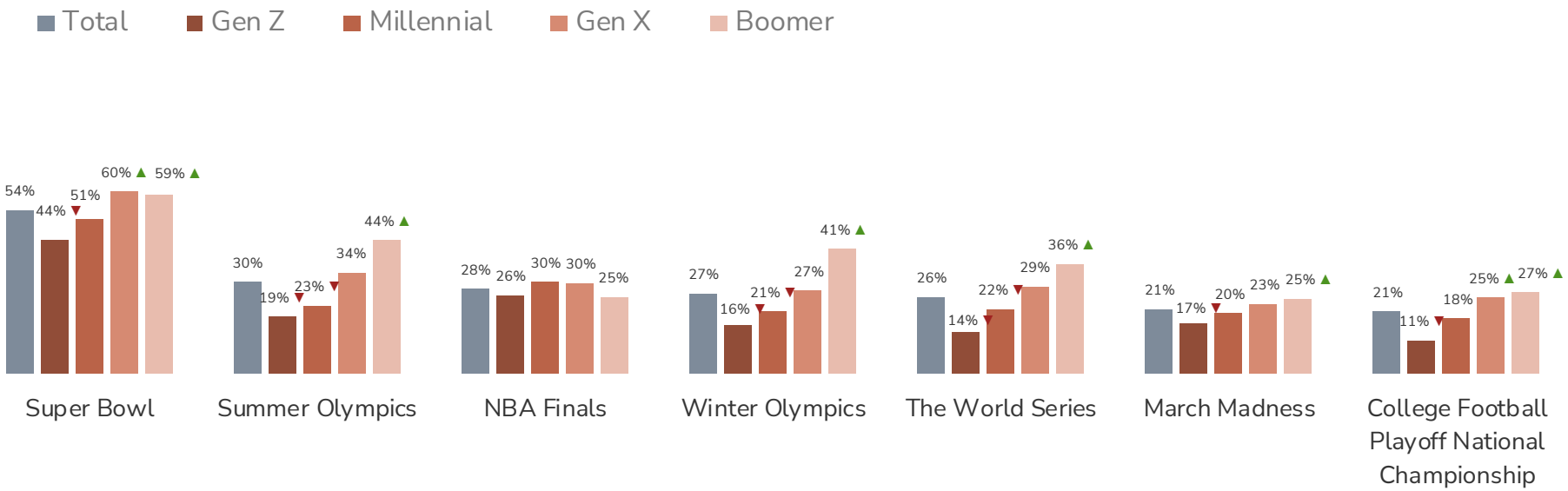
Total	Gen Z	Gen X	Boomer
38%	37%	43% ▲	20% ▼



Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
% agree
▲▼ Significantly over/under Total Population. Confidence level 95%

Older gens' eagerness to experience shared cultural moments drives their interest in major sporting events

Which of the following big sporting events do you typically watch?



Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Multiselect answer options
▲▼ Significantly over/under Total Population. Confidence level 95%

COLLAGE GROUP CONFIDENTIAL

U.S. patriotism also drives Boomer interest in the Olympics

Which of the following best describes why you watch the Summer Olympics?

	Total	Gen Z	Millennial	Gen X	Boomer
Rooting for the U.S. team	72%	52% ▼	72%	71%	79% ▲
Athletic competition	60%	53%	61%	59%	63%
It's a unifying event for the world	47%	38%	51%	49%	46%
Stories about individual athletes and teams	41%	34%	43%	39%	43%
Learning about other countries and cultures	37%	34%	41%	38%	34%
Rooting for a national team other than the U.S.	16%	18%	22% ▲	14%	12%



Gymnastics and swimming are the most popular events across generations.

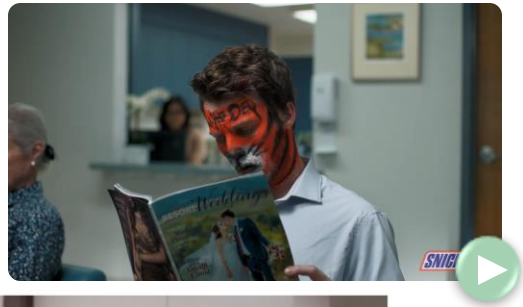
Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents who typically watch the Summer Olympics), weighted data
Multiselect
▲▼ Significantly over/under Total Population. Confidence level 95%

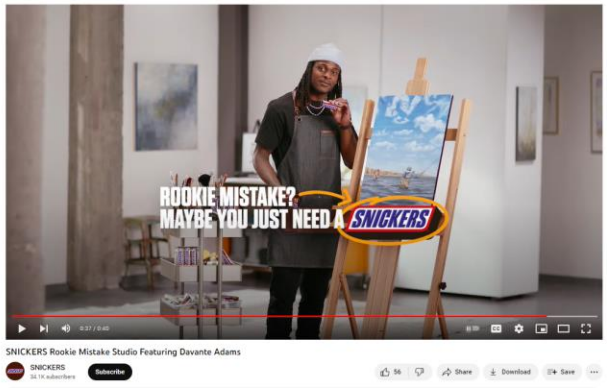
Tap into Americans' love for sports by highlighting athletes and fandoms

Snickers' longstanding sponsorship with the NFL drives relevance with football superfans

"Rookie Mistake" campaign invites fan engagement with star players. The series also includes ads poking fun at the experiences of hardcore sports fans. The brand additionally partnered with top 2023 NFL Draft pick Bryce Young for a new frozen dessert. The brand's 20+-year partnership with NFL drives Relevance and spurs Memories among football-loving Gen X and Boomers.







Check out Top Brands for Gen X study for more insights on Snickers resonance with the generation.

Source: YouTube, https://www.prnewswire.com/

COLLAGE GROUP CONFIDENTIAL

Appeal to Gen Z and Millennials with dynamic interactive broadcasts and relevant commentators in sports programming

NBCU Peacock taps popular podcaster Alex Cooper to host Olympics watch parties

On “Watch with Alex Cooper,” the *Call Her Daddy* host is set to anchor interactive livestreams of the upcoming Team USA sporting events. She, along with some special guests, will give live commentary and answer questions from social media. Cooper will also record her own podcast in Paris, producing companion Olympics content. The influencer along interactive engagement appeals to social-media savvy Gen Z and Millennials. The show parallels to livestream watch parties popular on Twitch, cultivating Relevance and spurring Momentum among these segments.



HALO EFFECTS

With the most popular female podcast host, the brand also appeals to Women in general. Cooper’s firecracker essence and foundation in female empowerment resonates with Women’s **Self-Directed** Group Trait.

Source: https://www.nbcphiladelphia.com

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Key Takeaways & Action Steps

KNOW THIS	DO THIS
TV is still Gen X and Boomers' primary source of entertainment, and cable networks are still the main way they follow sports. For older generations, sports are a point of pride. They view sports as an important part of American culture and relish in experiencing critical moments.	• **Showcase stories of sports teams' and athletes'** influence on American culture (and do so on their favorite channels). • **Highlight the traditions** important to sports history.
Younger gens are more likely to be fans of specific athletes and follow sports online through social media. Millennials' *Worldly* Group Trait likely drives their standout interest in soccer, while their Connection-Seeking Group Trait fuels their desire to gather with others to watch games.	• Draw younger fans into the game by creating snackable content that **highlights individual athletes and behind-the-scenes action**. Facilitate fans feelings of connection to players and their game.

Log into **fluen.ci** today to see how your brand performs with Americans across generations and other consumer segments across all dimensions of brand cultural fluency, including **Fit**, **Relevance**, **Memories**, **Values**, **Trust**, **Advocacy**, and "On the Rise" **Momentum**.

Source: Collage Group 2024

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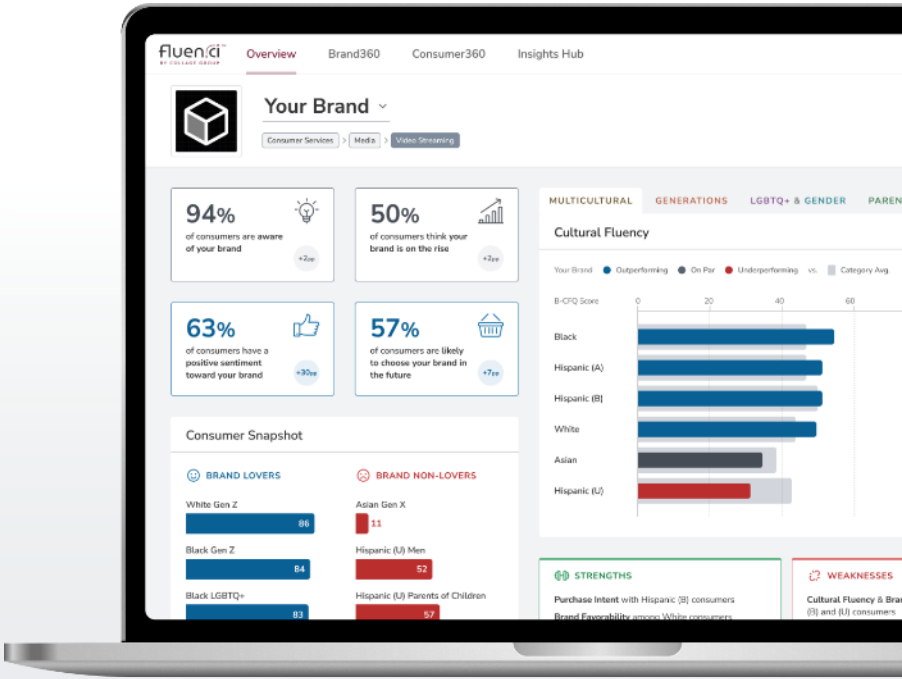
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B-CFQ components map to Collage Group's intelligence streams

Our rich and actionable insights help optimize cultural resonance and accelerate growth

	Consumer Essentials	Holidays & Occasions	Passion Points	Category Essentials	America Now	Top Brands / Ads
Fit				✓		✓
Relevance	✓	✓	✓			✓
Trust	✓			✓	✓	✓
Memories		✓	✓	✓		✓
Advocacy			✓	✓	✓	✓
Values	✓				✓	✓
Momentum	✓		✓			✓

✓ Primary recommendation ✓ Secondary recommendation

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B-CFQ Components

B-CFQ is measured across six dimensions



Fit

Offers a product or service I want



Values

Aligns with my values



Relevance

Intended for people like me



Trust

Seen as trustworthy



Memories

Provided positive past experiences



Advocacy

Worth recommending to others

Source: Collage Group 2024

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Home and Garden, Fitness, and Fashion

Dive into additional Generations Passion Points

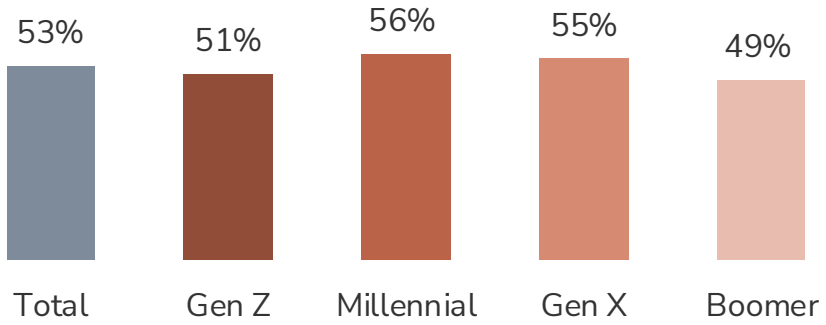


Home and Garden



Millennials and Gen X are most likely to enjoy doing home renovations

% of each segment that likes or loves doing home improvements and/or decorating.





Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
% like, love
▲▼ Significantly over/under Total Population. Confidence level 95%

Millennial Americans are more likely than others to do things themselves for home renovations

Which of the following do you agree with most, even if neither is exactly true?

	Total	Gen Z	Millennial	Gen X	Boomer
I am more of a "DIY" person when it comes to home renovations or repairs	46%	44%	53% ▲	46%	39% ▼
I like to find someone else to do any renovations or repairs that need to be done	33%	25% ▼	27% ▼	36%	44% ▲
Neither--I never do home renovations or repairs or hire someone else to do them	21%	31% ▲	20%	18% ▼	17% ▼

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Single select
▲▼ Significantly over/under Total Population. Confidence level 95%

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Millennials' Relentless nature shows up in their desire to get "deals" so they can renovate to increase their property's value

Gen Z's desire to personalize their space reflects their Collective Individuality values

What are the reasons you enjoy doing home renovations, improvements, or decorating?

	Total	Gen Z	Millennial	Gen X	Boomer
I like to customize and personalize my space	59%	67% ▲	60%	54% ▼	56%
I like to beautify the spaces I live in	51%	51%	49%	52%	54%
I like the challenge of doing it myself	45%	39% ▼	45%	45%	50% ▲
I like to get a "deal" and then improve the value through renovation	31%	27%	37% ▲	28%	31%

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Single select
▲▼ Significantly over/under Total Population. Confidence level 95%

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Gen Z and Millennials are more likely to use online sources for inspiration on their home renovations

Where do you go for home decorating and interior design inspiration?

	Total	Gen Z	Millennial	Gen X	Boomer
Visit home decorating or design stores (e.g., Home Goods)	35%	35%	37%	37%	32% ▼
Watch home decorating and design TV shows	34%	26% ▼	34%	39% ▲	35%
Browse home design blogs/websites (e.g., Pinterest, Houzz)	30%	38% ▲	34% ▲	28%	20% ▼
Go to thrift stores	27%	27%	32% ▲	28%	19% ▼
I don't do home decorating or design	25%	23%	20% ▼	24%	31% ▲
Follow home design influencers on social media	18%	24% ▲	26% ▲	16%	6% ▼

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Multiselect
▲▼ Significantly over/under Total Population. Confidence level 95%

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Millennials are the least likely to have outdoor space in the places they live in

Does the place you live (house, apt., etc.) have outdoor space available to you?

	Total	Gen Z	Millennial	Gen X	Boomer
Yes	83%	85%	80% ▼	84%	85%
No	17%	15%	20% ▲	16%	15%

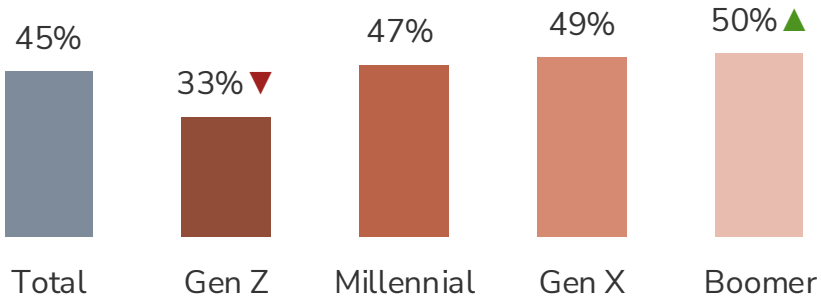


Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Single select
▲▼ Significantly over/under Total Population. Confidence level 95%

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Older generations, particularly Boomers, are more likely to enjoy gardening and yardwork

% of each segment that likes or loves doing gardening and yardwork.





Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
% like, love
▲▼ Significantly over/under Total Population. Confidence level 95%

Most Americans enjoy gardening for spending time in nature

Why do you enjoy gardening or yardwork?

	Total	Gen Z	Millennial	Gen X	Boomer
I like being in nature	64%	56% ▼	63%	68%	65%
It helps my mental health	58%	48% ▼	58%	59%	63% ▲
I like to beautify my outdoor spaces	57%	44% ▼	55%	58%	66% ▲
It's a form of exercise	50%	34% ▼	43% ▼	51%	63% ▲
I'm interested in plants/trees/bushes	45%	39% ▼	47%	42%	50% ▲
I like to grow my own produce/herbs	44%	36% ▼	47%	39% ▼	50% ▲

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents that like or love gardening/yardwork), weighted data
Multiselect
▲▼ Significantly over/under Total Population. Confidence level 95%

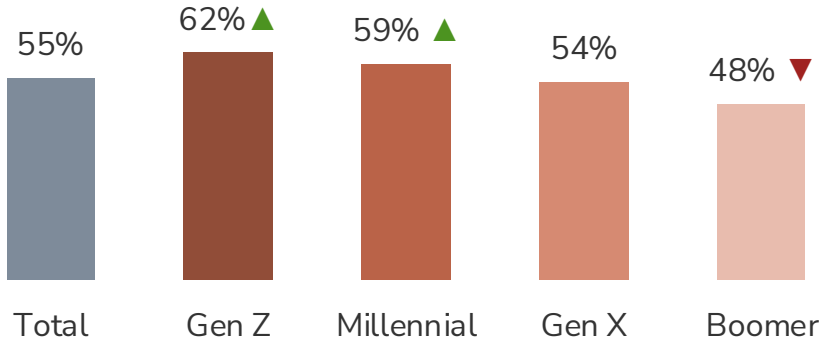
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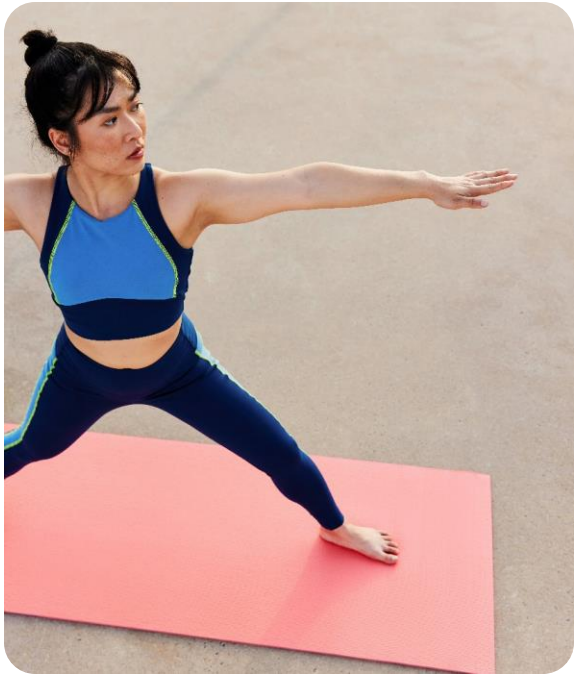
Fitness and Playing Sports



Younger Americans are more passionate about fitness and exercise

% of each segment that likes or loves fitness and exercise.





Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
% like, love
▲▼ Significantly over/under Total Population. Confidence level 95%

Gen Z and Millennials are more likely to work out for fun, while Boomers prioritize health

What motivates you to work out?

	Total	Gen Z	Millennial	Gen X	Boomer
I want to be healthy	63%	64%	60% ▼	62%	66% ▲
I want to lose weight	39%	43% ▲	38%	42%	34% ▼
It's fun for me	30%	37% ▲	35% ▲	28%	20% ▼
It gets me out of the house	28%	30%	31% ▲	28%	24% ▼
I don't work out	15%	7% ▼	15%	17%	22% ▲
I want to avoid injury	15%	14%	16%	13%	15%

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Multiselect
▲▼ Significantly over/under Total Population. Confidence level 95%

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Gen Z and Millennials are more likely to enjoy running or lifting weights

Gen X and Boomers mainly walk for exercise

Which of the following do you do for exercise on a regular basis?

	Total	Gen Z	Millennial	Gen X	Boomer
Walk for exercise	72%	55% ▼	70%	79% ▲	85% ▲
Lift weights	32%	38% ▲	37% ▲	29%	23% ▼
Run or jog	30%	46% ▲	38% ▲	24% ▼	10% ▼
Outdoor recreational activities (hiking, climbing, sailing, skiing, surfing, etc.)	21%	22%	26% ▲	20%	14% ▼
Swim	19%	22% ▲	21%	18%	16% ▼
Bike outdoors	17%	18%	18%	18%	13% ▼
Yoga	15%	16%	18% ▲	17%	11% ▼
Use a stationary bike	15%	11% ▼	14%	15%	22% ▲
Participate in a group fitness class	8%	9%	9%	7%	7%
Workout with a trainer	7%	11% ▲	10% ▲	4% ▼	3% ▼
Pilates	6%	8%	8%	6%	3% ▼

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Multiselect
▲▼ Significantly over/under Total Population. Confidence level 95%

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Younger Americans use online workout videos, apps, and gym memberships at higher rates than Older Americans

Which of the following do you use as part of your exercise routine?

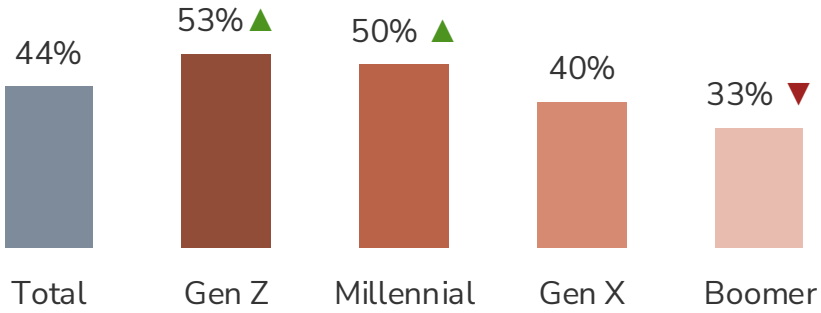
	Total	Gen Z	Millennial	Gen X	Boomer
At home gym equipment (e.g., treadmill, stationary bike)	35%	36%	36%	34%	35%
Online free workout videos (e.g., via YouTube, other websites)	27%	34% ▲	33% ▲	26%	14% ▼
A gym membership with general equipment and classes	24%	28% ▲	29% ▲	21% ▼	17% ▼
A workout app (e.g., Apple Fitness, Peloton, etc.)	17%	22% ▲	24% ▲	14% ▼	7% ▼
A boutique gym membership specializing in a specific type of workout (e.g., Orange Theory, Cross Fit)	7%	9% ▲	12% ▲	5% ▼	2% ▼
A personal trainer	6%	9% ▲	8%	6%	3% ▼

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Multiselect
▲▼ Significantly over/under Total Population. Confidence level 95%

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Younger Americans are more passionate about playing sports

% of each segment that likes or loves playing sports.





Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
% like, love
▲▼ Significantly over/under Total Population. Confidence level 95%

Gen Z and Millennials are more likely to play a variety of sports

Which of the following sports do you like to play? This could be for a hobby, for exercise, or on a team.

	Total	Gen Z	Millennial	Gen X	Boomer
Basketball	25%	31% ▲	33% ▲	24%	14% ▼
Baseball / Softball	20%	17%	23% ▲	20%	17% ▼
American Football	18%	23% ▲	25% ▲	17%	9% ▼
Soccer	15%	24% ▲	19% ▲	12% ▼	5% ▼
Tennis	12%	11%	12%	13%	12%
Golf	10%	6% ▼	10%	12%	12%
Boxing / Wrestling / MMA	10%	13% ▲	15% ▲	8%	3% ▼
Action / Extreme Sports	5%	7% ▲	9% ▲	4% ▼	1% ▼
Pickleball	4%	4%	4%	5%	5%
eSports	4%	8% ▲	5%	2% ▼	1% ▼
Hockey	4%	4%	6% ▲	3%	2% ▼
Cricket	2%	3%	3% ▲	2%	1% ▼
Lacrosse	2%	3% ▲	3%	1% ▼	0% ▼
Rugby	1%	2%	2%	2%	0% ▼
I don't play any sports	36%	22% ▼	29% ▼	38%	51% ▲

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Multiselect
▲▼ Significantly over/under Total Population. Confidence level 95%

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Millennials and Gen X especially see sports as a good way to spend time with family

I play sports to...

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

	Total	Gen Z	Millennial	Gen X	Boomer
Have fun	69%	70%	69%	67%	70%
Stay physically healthy or improve my fitness	52%	55%	48% ▼	49%	56% ▲
Spend time with my friends	47%	48%	47%	49%	45%
Spend time outdoors	47%	42% ▼	49%	48%	49%
To stay mentally healthy or improve my mood	42%	44%	44%	39%	39%
Spend time with my family	38%	25% ▼	47% ▲	44% ▲	34%

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents who play sports), weighted data
Multiselect

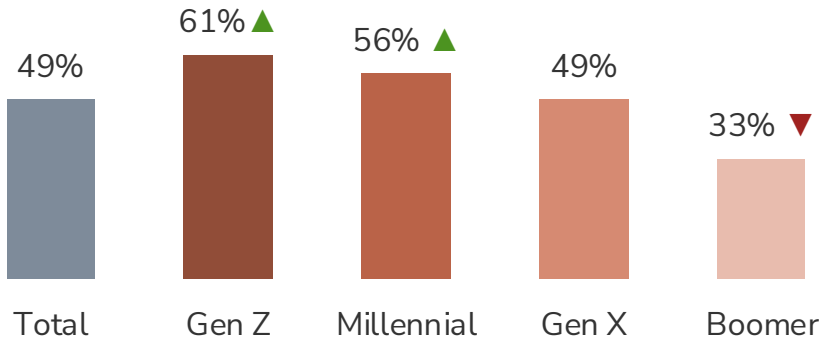
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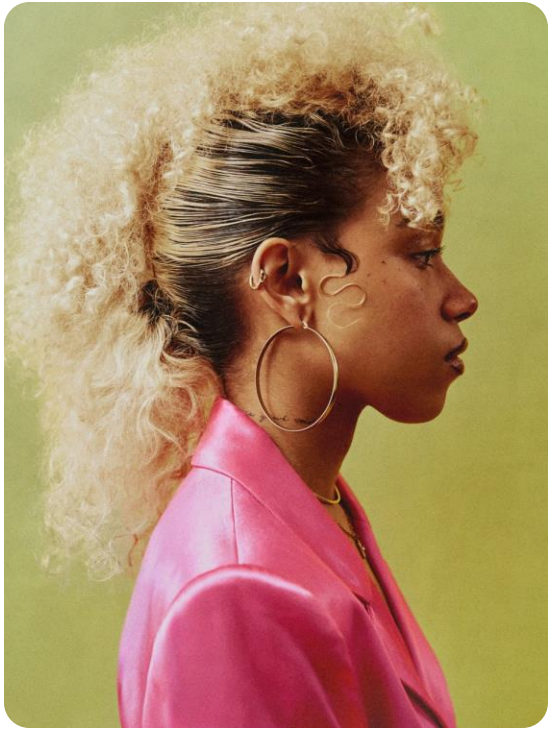
Fashion



Younger Americans are passionate about fashion and style, particularly Gen Z

% of each segment that likes or loves fashion and style





Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
% like, love
▲▼ Significantly over/under Total Population. Confidence level 95%

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Gen Z prioritizes fashion over comfort more than any other segment

Which of the following statements do you agree with most, even if neither is entirely correct?



Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Forced choice
▲▼ Significantly over/under Total Population. Confidence level 95%

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Gen Z and Millennials slightly prioritize being unique over trendy, but neither are that important to Gen X or Boomers

Which of the following statements do you agree with most, even if neither is entirely correct?

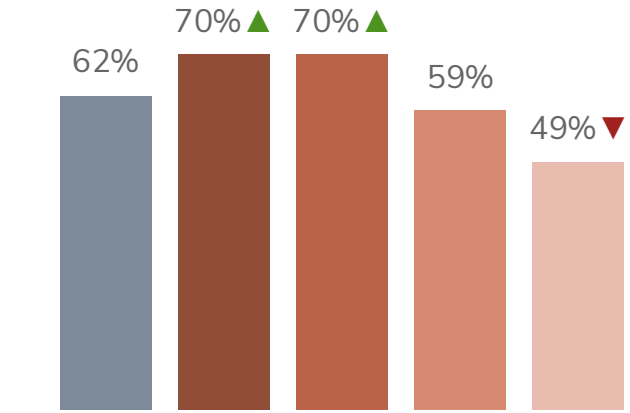
	Total	Gen Z	Millennial	Gen X	Boomer
It's more important that my style is **unique from mainstream trends**	24%	30% ▲	31% ▲	21% ▼	14% ▼
It's more important that my style **reflects the trends of the current moment**	18%	27% ▲	21% ▲	17%	9% ▼

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Single-select, Answer option not shown: Neither of these are important to me
▲▼ Significantly over/under Total Population. Confidence level 95%

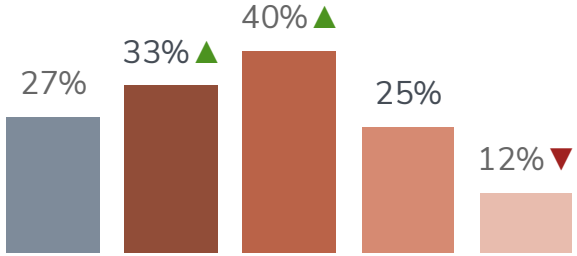
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Gen Z and Millennials see fashion as an outlet for personal expression

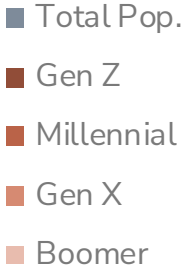
Millennials especially see themselves as trend setters



Fashion is a form of personal expression for me



I am a fashion trend setter



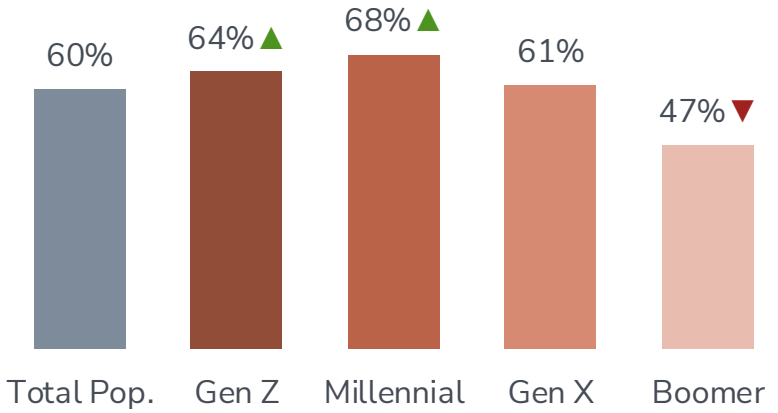
Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
% agree
▲▼ Significantly over/under Total Population. Confidence level 95%

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Gen Z and Millennials lead on thrift shopping for clothes

They enjoy the thrill of the hunt in finding unique pieces

I enjoy thrift shopping for clothes





"If I walk into my thrift store and I search between the racks and find all these amazing, really unique pieces I know I'm gonna find things that are speaking to me and my personal style."

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
% agree
▲▼ Significantly over/under Total Population. Confidence level 95%
TikTok @anna_annora

COLLAGE GROUP CONFIDENTIAL

Gen Z prioritizes all the different pieces that make up a "look"

Are any of the following things important parts of your overall style?

	Total	Gen Z	Millennial	Gen X	Boomer
Shoes (sneakers, high heels, boots, flats)	54%	61% ▲	56%	52%	48% ▼
Hair	49%	59% ▲	51%	48%	42% ▼
Jackets/outerwear	36%	42% ▲	36%	33% ▼	33%
Jewelry	30%	45% ▲	30%	26% ▼	22% ▼
Eyeglasses	28%	25% ▼	28%	32% ▲	27%
Makeup	24%	30% ▲	26%	22%	20% ▼
Nails (fingernails or toenails)	22%	30% ▲	25% ▲	19% ▼	16% ▼
Socks	22%	27% ▲	24%	19%	17% ▼
Hats	21%	19%	25% ▲	21%	17% ▼
Facial hair (beards, mustaches, etc.)	20%	17% ▼	25% ▲	20%	19%
Tattoos or Henna	17%	21% ▲	28% ▲	15%	3% ▼

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Multiselect; Other option: "Other accessories, (please specify)."
▲▼ Significantly over/under Total Population. Confidence level 95%

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Gen Z and Millennials draw fashion inspiration from a variety of sources, including social media, fashion websites, celebrities, and TV and movies

Where do you typically go for clothing and accessory inspiration?

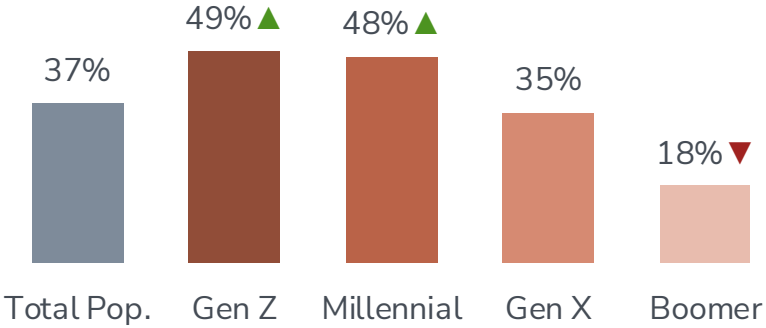
	Total	Gen Z	Millennial	Gen X	Boomer
Myself	43%	45%	46%	44%	39% ▼
Social Media	30%	50% ▲	39% ▲	23% ▼	9% ▼
Friends or Family	26%	34% ▲	29%	27%	17% ▼
Fashion/Style websites	21%	26% ▲	25% ▲	18% ▼	14% ▼
TV shows or Movies	17%	23% ▲	20% ▲	16%	8% ▼
Celebrities	12%	20% ▲	14% ▲	10%	4% ▼

Source: Collage Group Passion Points Survey, April 2024 (13-78 respondents), weighted data
Multiselect
▲▼ Significantly over/under Total Population. Confidence level 95%

Gen Z and Millennials are drawn to watching styling tutorials online

For Millennials, it is important to follow creators that represent their racial or ethnic background

I like to watch makeup, hair styling, or barbering tutorials online.[1]



57% ▲

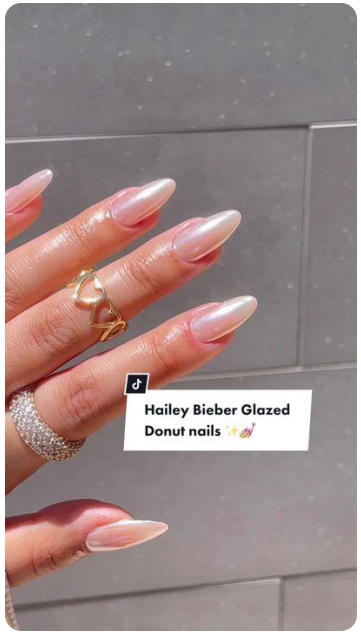
of Millennials say it's important that an influencer **shares their ethnic or racial background.**[2]

Gen Z	Gen X	Boomer
45%	47%	35% ▼

Source: [1] Collage Group Passion Points Survey, April 2024 (18-78 respondents), weighted data, % agree
[2] Collage Group Media Survey, July 2023 (13-77 respondents who follow influencers, celebrities, or other popular accounts on social media), weighted data
% somewhat important, very important, Multiselect grid answer options
▲▼ Significantly over/under Total Population. Confidence level 95%

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Recent beauty trends have included food-inspired aesthetics







Younger gens' interest in exploring fashion and beauty aesthetics has inspired a plethora of food-inspired makeup trends online. These looks are way of exploring one's personality and identity. Gen Z's Collective Individuality encourages self-expression and values creativity.

Source: Vogue Business

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