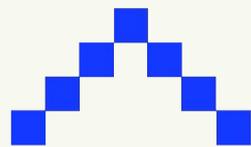




unconventional

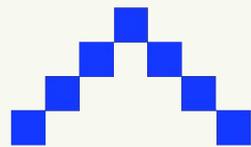
Truth

GEN Z



Section 1

Setting the Scene



There is no
shortage of
commentary
on Gen Z...

133k

Mentions of Gen Z in the
last 12 months from news
articles.¹

35k

Mentions of Millennials in
the last 12 months from
news articles.¹

¹Factiva, Search Analysis (last 12 months)



Despite all this
attention, **brands**
are still missing the
mark.

only **1 in 3**

Gen Z believe brand advertising accurately represents their generation.

only **1 in 5**

Gen Z believe brands are effectively connecting with people their age.

So where is the *disconnect*?

We always hear about how **Gen Z** are so different to the generations that preceded them.

More often than not, **people outside the generation** are the ones interpreting Gen Z, explaining what they think, how they behave, and why they act the way they do.

Instead of analysing Gen Z from the outside, **we asked Gen Z to analyse themselves** - to share how they think they're portrayed, which interpretations are accurate (or not), and what brands need to understand if they want to connect in a meaningful way.





Before we dive in, there are a few things to *keep in mind* when thinking about Gen Z.

Old people complaining about young people is not new.

When we asked older people, the most common words to describe Gen Z were **'lazy'**, **'entitled'** and **'selfish'**.

But this pattern isn't new. Gen X were labelled **'slackers'**, and Millennials the **'Me-Me-Me'** generation. Each wave of young people tends to inherit its own set of negative stereotypes.

'Gen Z behaviour' is often life-stage, not generational.

Many of the traits attributed to Gen Z are **predictable patterns** of young people establishing independence while operating with limited power, resources and stability.

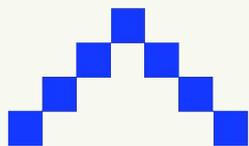
Take job 'loyalty' as an example. Gen Z are often labelled as job-hoppers, yet average tenure for **25–34** year olds in 2024 is **2.7 years**, compared to **3.0** years in **1983**. The gap is small, however the narrative is exaggerated.¹

Gen Z is not a homogenous group.

The generation spans teenagers through to adults nearing **30**.

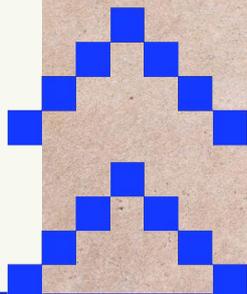
The pressures on a **14 year old** navigating identity and school are different from those facing a **28 year old** managing rent, career progression, family plans and financial security. Viewing them through a single lens oversimplifies and distorts reality.

¹U.S. Bureau of Labor Statistics, Employee Tenure in 2024



Section 02

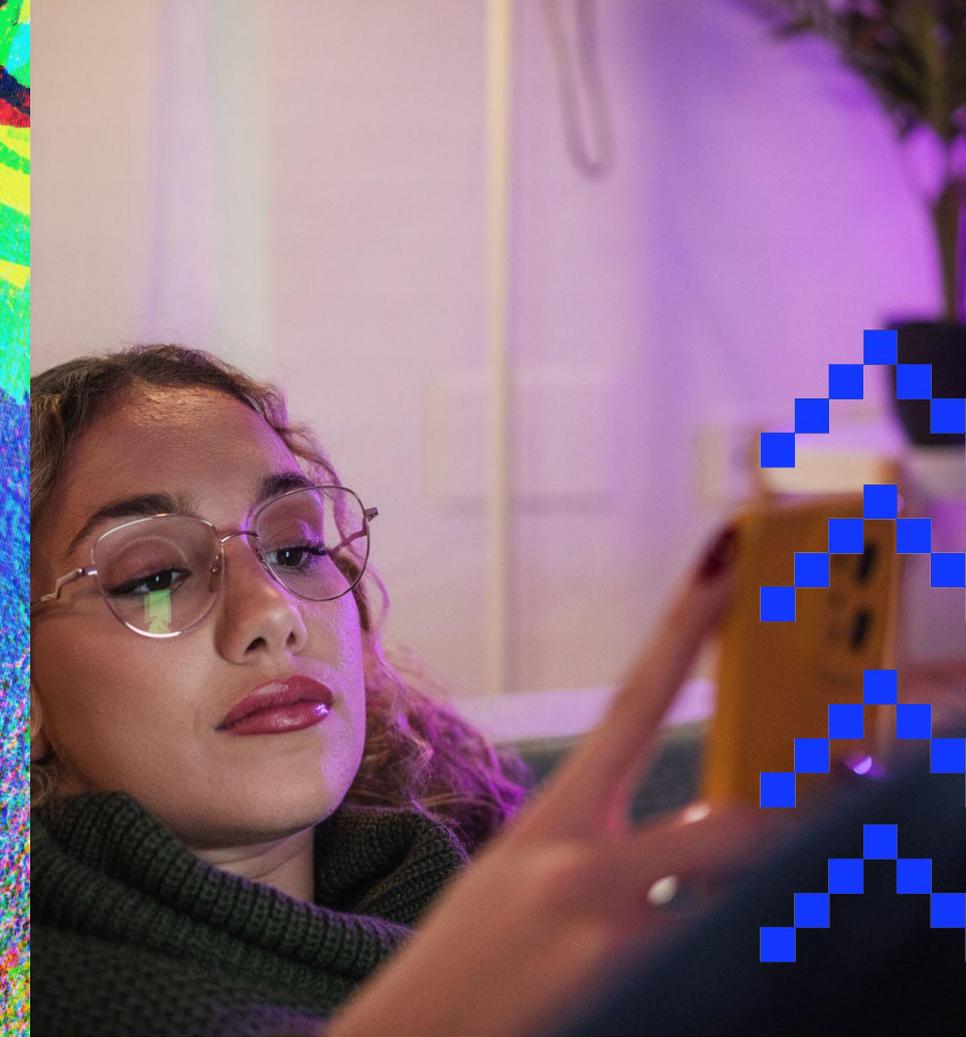
The Conventional Truths



Conventional Truth

01

Gen Z are the
most mentally
fragile generation



Do Gen Z think they're *fragile*?

Whilst some agree with this narrative, **more than half of Gen Z do not agree** that their generation is mentally fragile.

Gen Z acknowledge that there can be a tendency to **over-identify** with mental health labels, admitting they sometimes **'self-diagnose'** or jump to conclusions about conditions like ADHD.

They also recognise that constant digital exposure **heightens sensitivity**, making it harder to process criticism or disagreement without feeling **personally** affected.

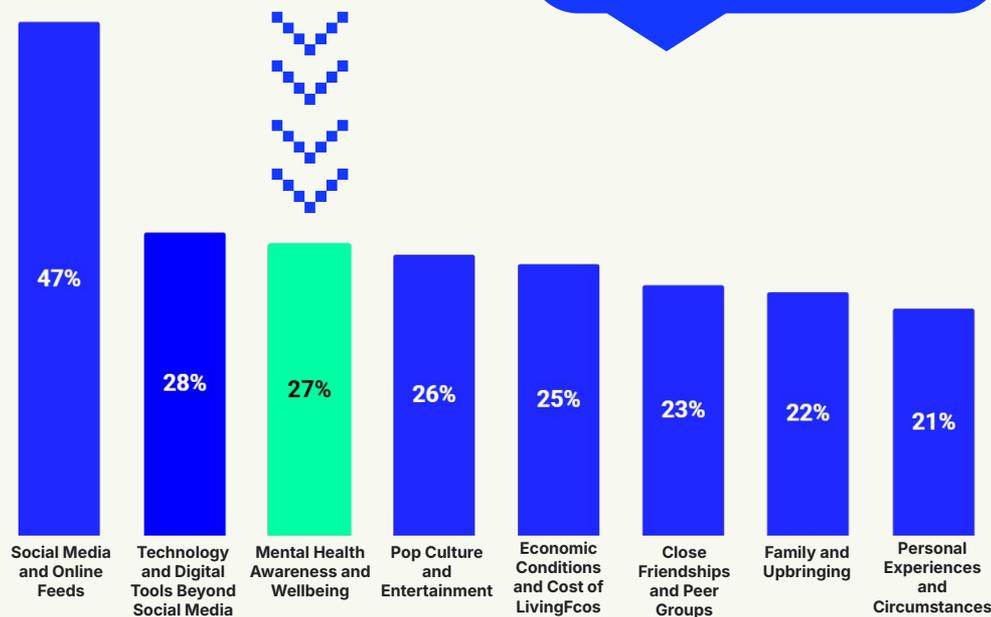
They're emotionally open not fragile.

What older generations label as **fragility**, Gen Z often see as **emotional openness**.

- **48%** of Gen Z believe they are the most emotionally intelligent generation (driven by 18-23 year olds). Only 20% disagree.
- **Gen Z** lists mental health & wellbeing as one of the most influential forces shaping their attitudes and behaviour, even more than their family and friends.

They don't see themselves as weak. They see themselves as **self-aware**. Brands that communicate with nuance and awareness will resonate, those that default to bravado or gloss will feel **outdated**.

Most influential factors on Gen Z attitudes & behaviours

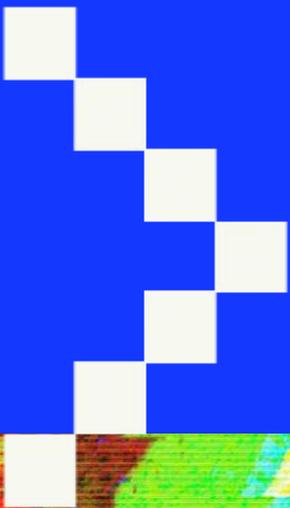


"I don't agree that we are fragile. I think Gen Z is the most **outspoken** generation, which can be perceived as fragile by **older generations**. It has become a much **safer space** for people to talk about struggling."

Female, 18-23 years old.

Conventional Truth

02



Gen Z lack social
skills



Do Gen Z think they lack social skills?

This is one of the few conventional truths that **Gen Z do agree with.**

They acknowledge that growing up as a digital-first generation created a **social confidence gap**, leaving many feeling they simply 'don't know how to talk'.

However, **COVID-19** lockdowns also contributed to avoidant behaviours, normalising withdrawal from social life and prioritising personal comfort over community.

The majority (**57%**) believe both the consistent use of technology and COVID have made their generation less socially developed (rising to 61% for 18–23 year olds).

They crave connection but struggle to build it

The deeper tension that is emerging is a **stronger urge for connection than ever before.**

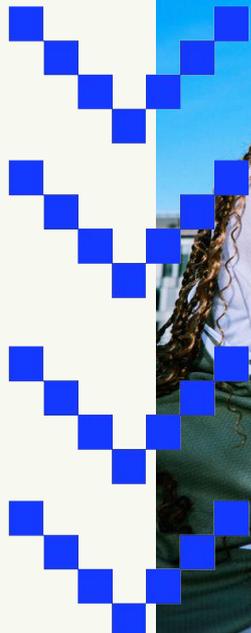
81%

say strong friendships and connections are important (87% for 13-17 year olds).

85%

felt lonely in the past month due to a lack of meaningful relationships and inadequate time with family and friends.

This is not a generation that doesn't value connection. It's a generation that is **struggling to build it with each other.** For brands, the opportunity isn't to manufacture connection with your brand, but to help **push people towards each other through your brand.**



“People are very flaky now because of COVID. Before, you showed up for your friends even if you didn't feel like going. Then you had years at home where you didn't have to do anything. When everyone got out of that, it became easier to just not show up.”

Female, 24-29 years old.

Conventional Truth

03



Gen Z do not
prioritise traditional
milestones



Do Gen Z care for traditional milestones?

Yes, Gen Z **do care for these milestones**.

This generation continues to place **strong importance** on financial security, career success, home ownership, family and marriage.

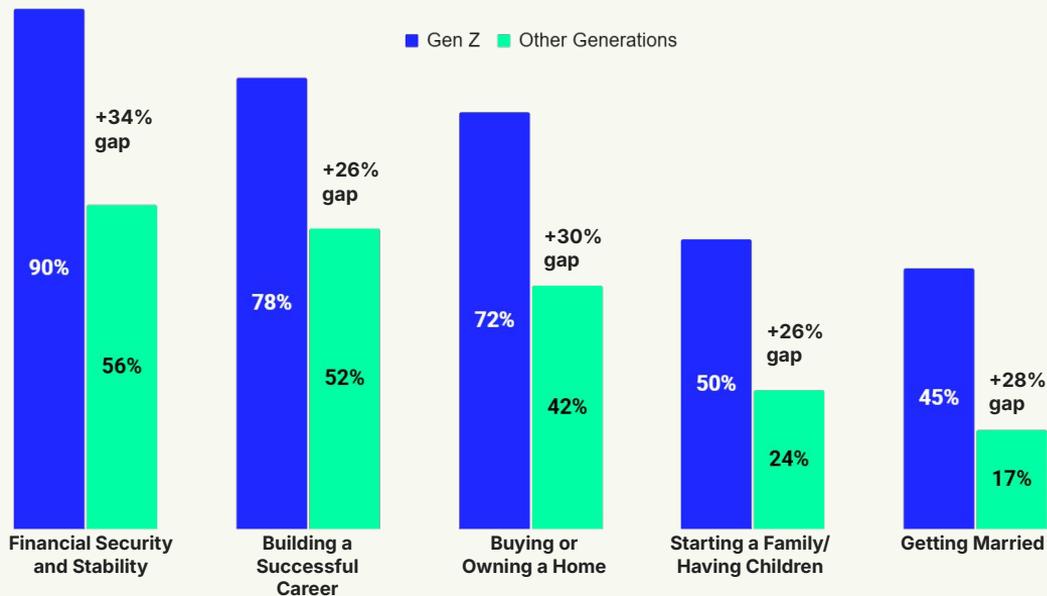
It is not a lack of ambition, a common interpretation of Gen Z. It is the scale of underestimation.

Across every major life milestone, older generations significantly **underestimate** how much these goals still matter to Gen Z.

It's not that stability has lost relevance, **it's simply being misread**.

Older generations heavily underestimate how important *traditional life milestones* are to Gen Z.

Importance to Gen Z vs Perceived importance to Gen Z by other generations.



Not only do older generations underestimate the importance of these key milestones for Gen Z, but they often forget to capture the **nuance with the generation**:

- Gen Z **aged 13-17** place greater importance on building a successful career (**84%**) vs. those aged 18-23 (**80%**) and 24-29 (**70%**).
- Gen Z **aged 24-29** are more focused on starting a family (**59%**), compared to those who are 13-17 (**39%**), 18-23 year olds (**51%**).

Nonetheless, millennials are more likely to accurately estimate the importance of these milestones to Gen Z, with the gap widening among older generations.

Traditional milestones matter, but *attainability* is the challenge.

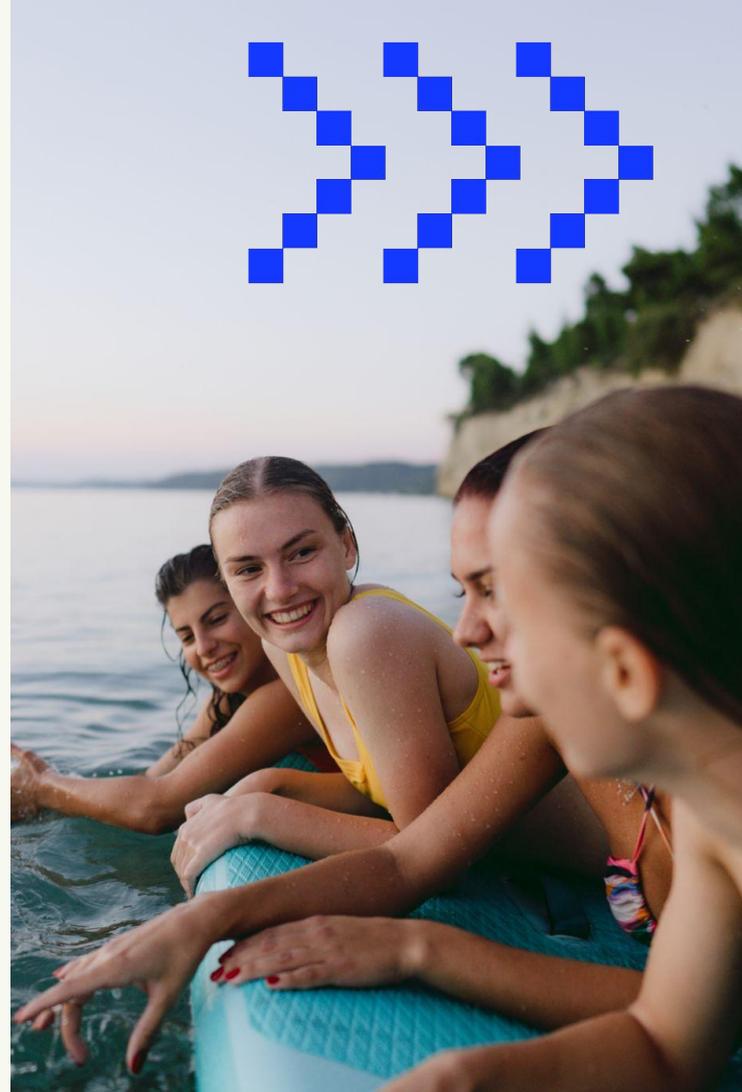
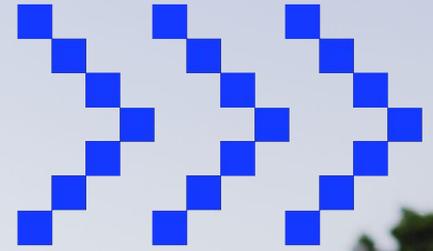
Many long term milestones **feel structurally out of reach** in the current economic climate.

When financial security, home ownership and long term accumulation feel unrealistic, spending on immediate and accessible experiences becomes rational.

Gen Z haven't opted out of stability, they're delaying it. Brands that read that as disinterest will misjudge them. Aspiration still works, but it needs to feel within reach.

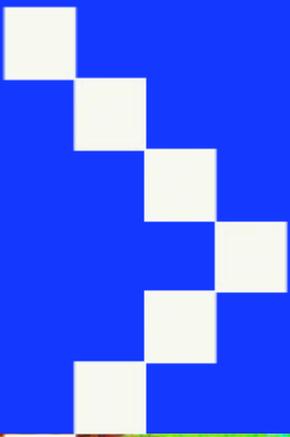
"We live in a world where everything is so expensive. Saving for a house feels incredibly difficult, so it makes sense that people my age prioritise short term luxuries or small pleasures instead."

Female, 18-23 years old.



Conventional Truth

04



Social media is
the only effective
channel to engage
Gen Z



Is social media the only way to reach Gen Z?

Discovery is not owned by a single media channel. For Gen Z, it is an **interdependent ecosystem**.

Social media remains a powerful gateway for brand discovery, with **1 in 2** Gen Z discovering brands through the channel, but brand discovery is far from purely digital.

Two thirds of Gen Z discover brands through in-person environments, spanning retail stores, public spaces, events, and word of mouth. Physical presence still plays a critical role in putting brands on their radar.

Brands are **not found in one place**, they are encountered across social feeds, physical spaces, and everyday conversations.

Brand engagement extends beyond the social feed

71%



Net In Person Experiences

How Gen Z choose to engage with brands.

46%

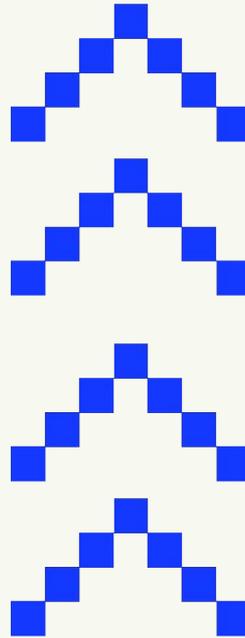


Net Digital Sites

45%



Social Media Platforms



In person exposure is the undisputed leader in engagement (**71%**), driven by in-store (**44%**) and word of mouth (**39%**).

Digital beyond social (**46%**), such as news, brand websites and review platforms, still serve as critical touch points beyond the social feed.

Social media (**45%**) is a vital but non-exclusive entry point.

Social media provides high exposure, but difficult to cut through.

On TikTok, it can take just **13 minutes** to scroll past **100 videos**.¹ 100 competing messages in the time it takes to drink a coffee.

In that environment, standing out is difficult. Being remembered is harder.

¹ Kentucky Attorney General's Office, citing TikTok internal documents (October 2024)

Gen Z are *reducing* their time on social media

Gen Z are not blindly attached to social platforms. Many are actively regulating their social media use and consciously stepping away from platforms that feel **excessive** or **overwhelming**.

45%

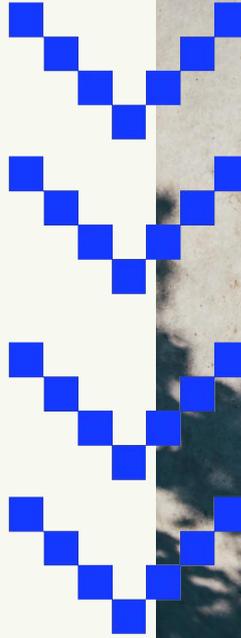
have reduced their time on social media for mental health reasons.

3 in 5

support the recent social media ban for under-16s and recognise broader wellbeing and societal trade offs.

These environments may drive exposure, but they can also amplify comparison, criticism and emotional fatigue.

If you rely solely on social, you're competing in the **noisiest** environment with **active avoidance** starting to take shape. Social should be part of the mix, **not the entire mix**.



"I'm trying to get away from it any chance I get. I saw this hack on my phone, so if I open Instagram or TikTok, it turns on my flashlight after two seconds. So it can be very scary on public transport in case someone thinks I'm taking a photo of them or something. It kind of stops me from using it."

Male, 19-23 years old

Gen Z are not what the stereotypes suggest.

Conventional Truths

- 1 Gen Z are the most mentally fragile generation.
- 2 Gen Z lack social skills.
- 3 Gen Z do not prioritise traditional milestones.
- 4 Social media is the only effective channel to engage Gen Z.



Unconventional Truths

- 1 What older generations view as emotional fragility, Gen Z view as emotional intelligence.
- 2 Gen Z recognise the drop in social confidence, but they crave connection more than ever.
- 3 Traditional life milestones are still a goal for Gen Z, but attainability is the problem.
- 4 Brand discovery is an ecosystem, and many Gen Z are actively reducing their time on social media.

In attempting to win over this generation, brands are building their marketing tactics off conventional truths and assumptions about Gen Z.

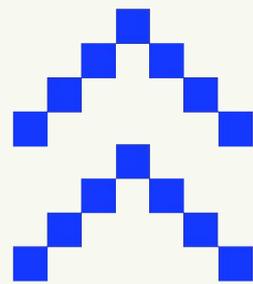


But if these assumptions are not the whole truth, this approach misses the mark...

Gen Z *reward* brands that understand them, but are *less responsive* to those that don't.

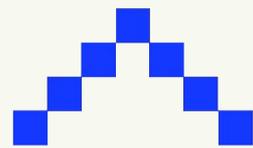
So what are the *four most common mistakes* brands make when engaging Gen Z?





Section 03

Navigating the *Danger* Zone



1. Avoid the 'Try Hard' Trap

Forced relevance reads as **desperation**.

50%

feel brands get it wrong by being 'too cringey' or trying too hard to force a connection, particularly amongst the 13-17 year olds (**54%**).

The intention to be culturally relevant isn't the issue. The **execution** is. When brands jump on slang that doesn't fit, insert themselves into trends they don't understand, or overplay humour in an attempt to feel relatable, it doesn't land as playful.

Gen Z grew up online. They have a finely tuned sense for tone, timing and authenticity. They can tell when a brand is participating in culture vs. **chasing it**.

Connection can't be forced. It has to be earned, **or it will be rejected**.

"I think if a brand tries too hard to follow a trend, it makes it like, kind of not that interesting."

Female, 16-18 years old.

2. Stop Stereotyping Them

Assumptions are a **fast track to failure**.

46%

of Gen Z believe brands alienate them by relying on stereotypes rather than truly understanding their needs. This rises to 51% among 18-23 year olds.

The issue isn't that brands are trying to connect. It's how they're doing it.

When messaging leans on **clichés** instead of **context**, it feels **lazy**. When tone tries too hard to be **'youthful'**, it feels forced. When every campaign assumes the same motivations, it signals that the brand hasn't done the work.

Successful engagement requires **nuance** and understanding, **not actions based on stereotypes**.

"They don't really reflect what people really want, especially because Gen Z is a whole generation we come from like so many different backgrounds, cultures, and parts of life."

Female, 19-23 years old.

3. Influencer Fatigue is Real

Influencer marketing can be highly effective when it feels **natural** and **aligned**.

But it is not a shortcut to credibility.

34%

of Gen Z say brands miss the mark when they overuse or **rely too heavily** on influencer partnerships.

We've all skipped through the sponsored part of a YouTube video or podcast. When the brand doesn't align with the creator, the partnership feels transactional, the script is obvious, or the 'paid partnership' tag appears upfront, it's wasted ad spend.

Brands are wasting money on influencer marketing.

Up to **45% of creator ad spend is wasted** due to not following creative best practices, including early branding and suboptimal structure, and even when watched, it doesn't always drive impact, with only **27% of creator content strongly linked to the brand**.¹

"There's so much misinformation spread by influencers that I just I don't think you can trust them because at the end of the day, I think they have their own interests in mind."

Female, 19-23 years old.

4. The Weapons Grade Bullshit Radar

Gen Z were born into the internet, raised on ads, influencers and algorithms. That constant exposure has sharpened their instincts. In a world of flooded feeds, they can spot manipulation instantly, and brands don't get the benefit of the doubt.

34%

say connection is lost when **brands feel performative**, such as engaging in PR activism or greenwashing.

They've seen 'purpose & authenticity' used as a marketing tactic before and can spot when it's performative, not operational. Scrutiny is instant, and credibility is fragile.

The same applies to AI. Macquarie Dictionary named 'AI slop' its 2025 Word of the Year.

2 in 5 say brands are poorly executing AI content. In an environment this saturated, automation without substance erodes trust quickly. You either add value, or you trigger the radar.

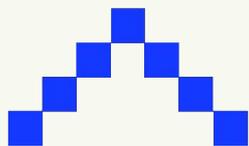
"There needs to be some sense of like actual authenticity and realness, because I feel like you can just sense when someone's being fake or not really. Like you can just tell when they don't actually care about what they're talking about"

Female, 19-23 years old.



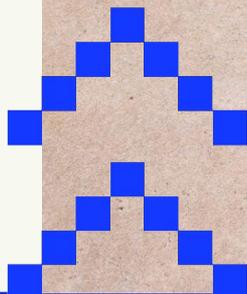
Gen Z are not what the stereotypes suggest. Brands don't just compete for attention, they compete for relevance.

In order to *build meaningful, mass relevance with Gen Z,* there are four key roles a brand must play.



Section 04

The Marketing Playbook



Four Roles That Build *Relevance* With Gen Z

Relevance isn't about saying the right thing. It's about **playing the right role**.

Four clear roles emerge as ways brands can move beyond attention hunting and instead create **genuine relevance** in Gen Z's lives.

1. *The Validator*

Acknowledge the pressure. Reflect lived reality.

2. *The Credible Actor*

Close the say-do gap with accessible action.

3. *The Connector*

Create spaces and ritual for real connection.

4. *The Coach*

Enable progress toward long term aspirations.

The Validator

Acknowledge the Grind.

Gen Z didn't choose the context they're growing up in. They are digital natives who came of age through a pandemic and are entering adulthood in a cost-of-living crisis.

65% believe it's harder to grow up and thrive today than previous generations.

52% of older generations agree.

What they're dealing with:

- Housing affordability delaying or reshaping major life milestones
- Rising loneliness, with fewer relationships and weaker social connection
- Entering a job market being reshaped by AI before establishing stability

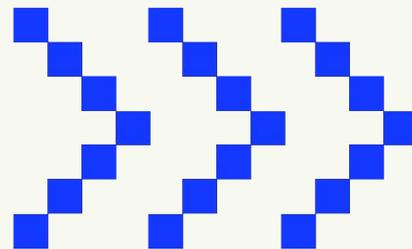
When brands recognise this reality, something shifts. Gen Z feel **seen, not sold to**.

6 in 10

Gen Z state it's important for a brand to feel relatable and align with their **personal beliefs**.

1 in 3

say brands miss the mark by failing to reflect the economic and mental health pressures they face (**38%** for females).



The opportunity is for brands **to simply acknowledge reality**.

Brands build relevance when they:

- Acknowledge their lived realities, not an idealised version of it
- Reflect both the pressures and behaviours shaping their lives
- Avoid oversimplifying or romanticising their experience

Case Study: Knorr

Knorr recognised that for Gen Z, **modern dating is genuinely hard**. 98% find dating culture confusing and overwhelming. Rather than ignoring this, Knorr validated it and built a campaign around it.

- 93% of Gen Z singles see **cooking as the ultimate green flag** on a dating profile, with 88% more likely to connect with someone who can cook. Knorr turned this into #UnlockYourGreenFlag, a campaign that repositioned cooking from a household skill into a dating advantage.
- Knorr's green flag logo became a double-edged call to action: encouraging singles to add cooking to their profiles, turning those profiles into a new media channel with users as brand ambassadors.
- 284 creators across 29 markets and 7 languages gave it **local relevance**, in some markets sparking real-life dating events with 80% of attendees leaving with a date.

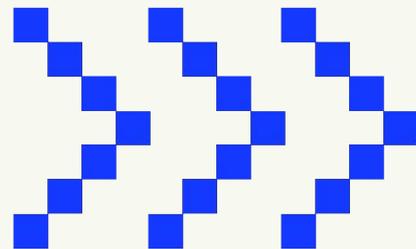
Commercial impact:

- **700M+ impressions** from 12M singles globally
- **15%+ brand uplift among Gen Z** in the Philippines
- **3%+ purchase intent** increase among Gen Z in the US

The image shows the Knorr logo, which consists of the word "Knorr" in a white, cursive font inside a green leaf-like shape. To the left of the logo is the text "#UnlockYourGreenFlag" in a bold, white, sans-serif font. The background is a vibrant green with a colorful, abstract pattern on the left side.

#UnlockYourGreenFlag
Knorr

The Credible Actor



Bridge the Gap.

We've long heard that Gen Z want brands to have a **positive impact** on society, and that remains true.

59%

expect brands to contribute meaningfully to society or the environment.

Yet they've been criticised for not 'putting their wallets where their mouth is.'

So what happened?

- Brands turned responsibility into a premium strategy.
- 'Conscious' collections at higher prices.
- Greenwashing and performative activism.
- Purpose used to justify mark ups.

In a cost-of-living crisis, **values** struggle to compete with **affordability**.

When responsibility costs more, cost wins.

The opportunity

Brands can still win Gen Z through responsible practice but responsibility must be:

- Real, to avoid the **bullshit radar**.
- Embedded in the core offer, not isolated in campaigns.
- Free from a '**moral surcharge**'.
- Proven operationally, not just creatively.

Case Study: e.l.f. Cosmetics

e.l.f. Cosmetics has proven that high-standard ethics and accessibility aren't opposites. Embedding responsibility into its founding model makes ethical beauty the affordable option, not the expensive one.

- **100% vegan and cruelty-free** at \$6.50 average, vs. \$20+ for luxury competitors. Dual-certified by PETA and Leaping Bunny. Proof that you can provide ethical products without the moral surcharge.
- While 78% of the world's top 50 beauty brands still fund animal testing, e.l.f. became the **first beauty company to achieve Fair Trade certification** across its supply chain, covering 85% of products.
- Stocked in Priceline, Kmart and Coles, e.l.f. brings ethical beauty into **everyday retail**

Commercial impact:

- #1 cosmetics brand among Gen Z, commanding **35%** of the category among **US teenagers**, more than **4x rival** Rare Beauty (8%) and legacy giant Maybelline (6%)
- **77%** net sales **growth** in fiscal 2024, hitting \$1B revenue.
- **5.3 million loyalty members**, driving 95% of all app transactions



e.l.f.
respect.

*that feeling when
you learn e.l.f. is vegan
and cruelty-free.*

The Connector

Encourage community.

Gen Z place high importance on strong friendships and community yet many **struggle** to build them in practice.

44%

say they want help connecting with a community that shares their interests, and **60%** say it is important a brand is recommended or used by people they trust.

But there is a clear **tension**

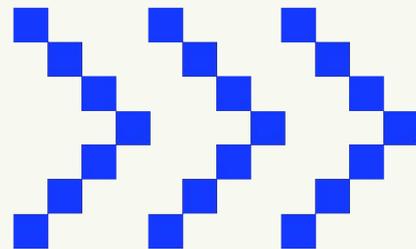
The desire for connection is **strong**, but the confidence and momentum to initiate it is **weak**. Digital immersion and prolonged isolation have made withdrawal easier and initiation more vulnerable.

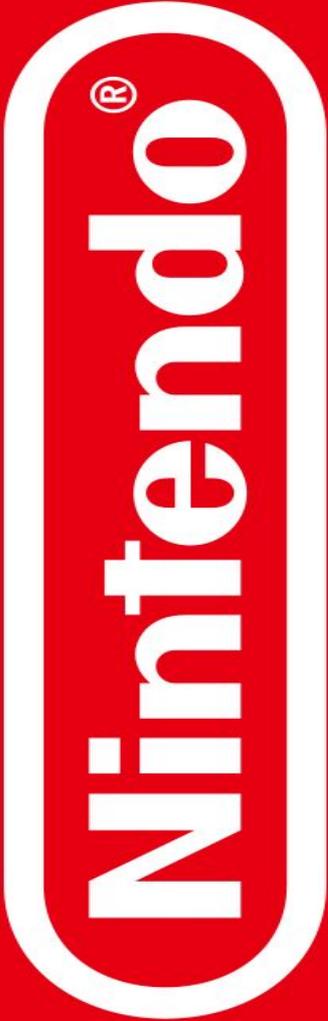
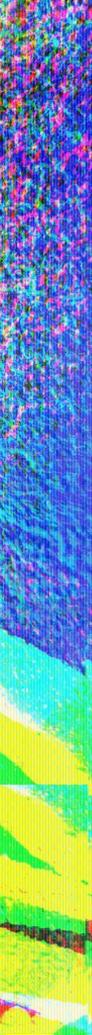
This creates a clear role for brands. Not to simply reach Gen Z but to **reduce the friction of belonging**.

The opportunity

By creating **structured, low pressure** environments around shared interests, brands can partake in real world connection and build trust organically.

In a generation experiencing both high loneliness and high desire for community, **relevance comes from being a part of peoples connection**, not always building it or filling the feed.





Nintendo®

Case Study: Nintendo

Nintendo turned gaming into a shared social experience, designing the **Switch** ecosystem to bring people together both online and in real life.

Rather than positioning gaming as a solo activity, Nintendo built the Switch around **physical interaction and communal play**, encouraging friends, families and strangers to connect through shared moments.

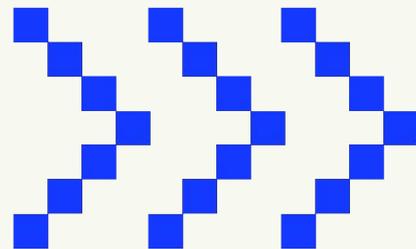
- Joy Con controllers allow instant multiplayer anywhere, turning one console into a spontaneous group activity.
- Local wireless play enables multiple players to connect devices in the same room, reinforcing in-person interaction.
- Nintendo hosts live demo events and gaming tournaments where fans experience new titles together.

Commercial impact:

- **3.5 million** units sold in the first four days of launch.
- **21% of global users** are under 18 years old.
- **28%** of gamers globally are aged 18-29.
- **139 million** consoles sold globally.

The Coach

Turn Aspiration into Capability.



Gen Z are **highly aspirational**. They care deeply about financial security, career progression and personal growth.

44%

say it's important for brands to be informative, helping them understand topics and master routines.

There is a **gap** between wanting to succeed and knowing how to get there. This creates a powerful role for brands.

Not to sell the end state but to help build the **capability to reach it**.

The opportunity

By providing **education, tools, practical guidance** and **skill building support**, brands can move from being aspirational symbols to enabling partners.

In a generation adapting to structural constraint, brands that help Gen Z build the capability to pursue their ambitions, while acknowledging the difficulty of attainability will win out.



Case Study: Mecca

Mecca positioned itself as a coach, not just a retailer.

In a generation that is highly aspirational but often lacking clarity or confidence, Mecca embedded education into its core model.

- Beauty Lab hands-on sessions
- 1:1 lessons and masterclasses
- Tiered Beauty Loop program
- 200,000+ member Mecca Chit Chat community

Mecca invests **\$30 million** into staff training and positions its teams as educators and caretakers. Education and experience lead the model, differentiating the brand from competitors often perceived as overwhelming.

Commercial impact:

- **107+** stores across Australia and New Zealand.
- Continued expansion, beating out **global competitors** Sephora (owned by LVMH).
- **\$1** billion turnover.

Summary

The What?

In a world where Gen Z are often misunderstood, this study uncovers the reality of their wants and needs.

They are emotionally intelligent and, contrary to popular belief, still value traditional life milestones, but significant structural barriers hold them back from achieving them.

And while they are hyper-connected online, many feel disconnected in the real world, driving them to seek brand discovery beyond social media, through in-person experiences and genuine, real world connections.



So What?

There is a clear tension between Gen Z and brands who try to connect with them.

Conventional marketing that relies on forced cultural relevance, superficial influencer partnerships, and generational clichés triggers instant skepticism.

Brands that feel hollow or performative are widening the disconnect and risk losing relevance with this generation.



What Next?

Attention alone is no longer enough, brands must prove their value in everyday life.

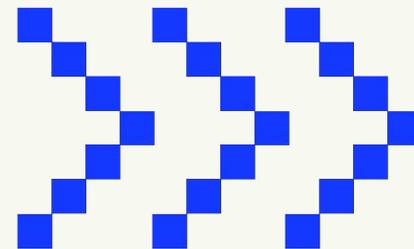
Marketers must stop chasing generic cultural relevance and instead adopt four specific roles to build genuine utility in Gen Z's lives:

- Act as a Validator
- Be a Credible Actor
- Play the Connector
- Step in as Coach



Appendix

Methodology



Stage 1 Qualitative

We conducted 3 separate focus groups with a total of n=16 participants and capturing 4.5 hours of engagement. This was based in Sydney and included a spread of gender, age, lifestage and ethnicity. Focus groups were conducted from December 10th - 11th 2025.

- The process was designed to capture deep, diverse perspectives on who Gen Z are, how they perceive themselves, and how this differs in lifestage.
- We conducted these groups in Inner City suburbs and Western Sydney suburbs.
- The groups were divided by lifestage. 16-18 year olds, 19-23 year olds, and 24-28 year olds.

Stage 2 Quantitative

Following the qualitative exploration, a large-scale quantitative survey was conducted to validate and expand on the findings. Australia wide, including a spread of gender, age, lifestage and ethnicity.

This survey engaged a nationally representative sample of n=2,008 respondents aged 13 years and older, ensuring that we are able to conduct analysis between Gen Z and all other generations.

The survey, which lasted 10 minutes per participant, was fielded from the 29th of January to the 12th of February 2026.