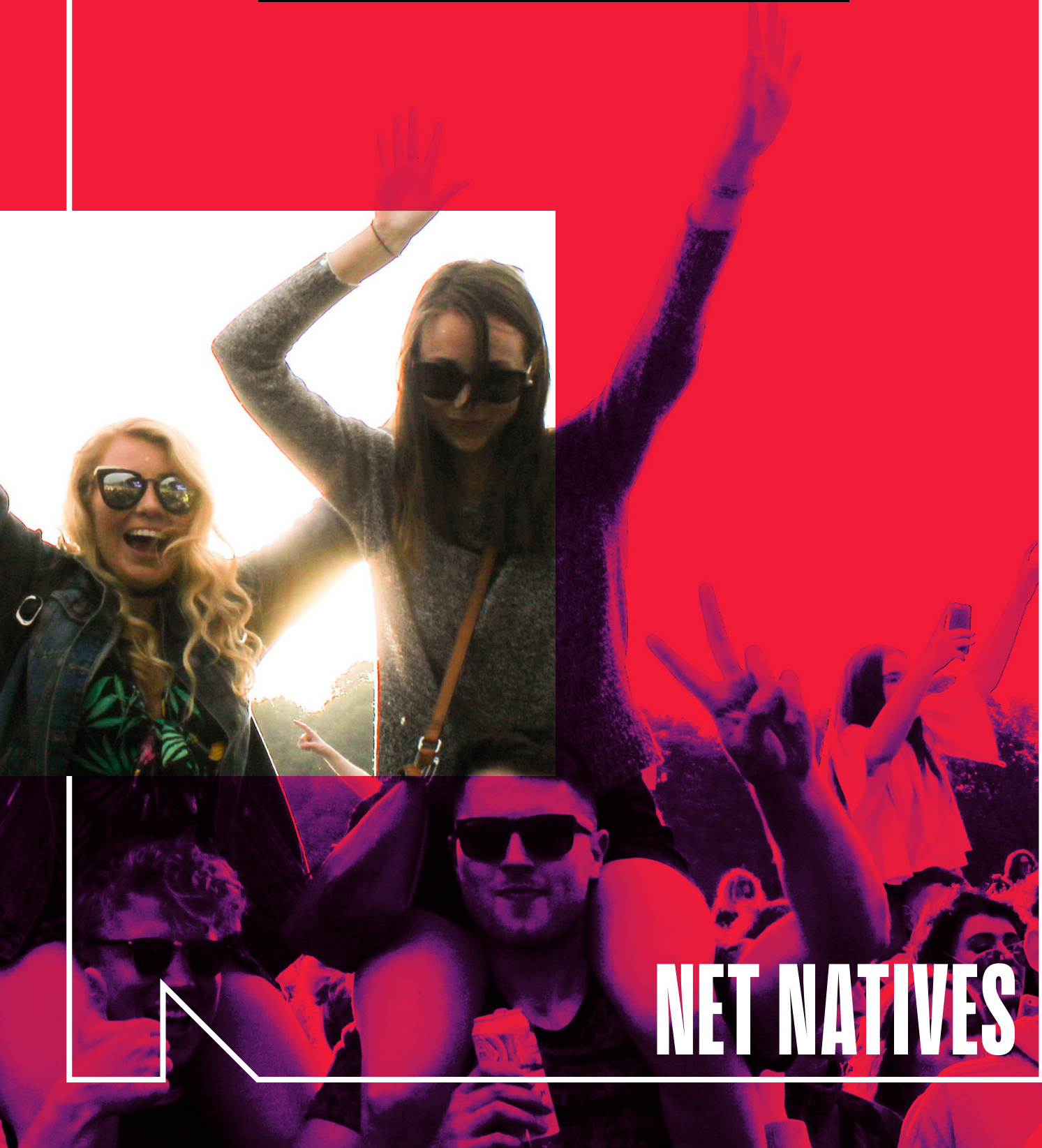


The Student Marketer's Guide:

Understanding Gen Z



NET NATIVES

Understanding Gen Z

Reading this guide, you will:

- Gain a solid understanding of who Generation Z are, where they are currently, and where they are heading.
- Learn what a good marketing strategy looks like to maximize engagement from Gen Z students and campaign impact.
- Gain insight into how to build your institution's brand so that it stands out from the crowd and resonates with your Gen Z students.





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Who are Gen Z?

Before we dive into how the education industry and the wider marketing community are taking on the challenge of capturing Generation Z's attention for longer than a few seconds, we look to who they are. Questioning, what's got them to where they are today and what makes them tick. Because after all, to attract and engage with students, you must think student.

Let's begin by understanding who this new power Gen is and then we can unravel exactly how to get them onboard.

Generation Z is quickly becoming the largest and most diverse generation in history. In 2019, they're aged between 3 and 23, making up 32% of the global population. By 2020, Gen Z is expected to account for 40% of all consumers, which will only increase when you consider their influence on global trends and their parent's wallets.

Gen Z and millennials are often bunched together, but they are two very distinct groups, the main difference being the times in which they grew up, and how this has altered their expectations of life.

Millennials watched their baby boomer parents ascend the property and career ladders so expected a similar upward trajectory for themselves. When you pair this with technology advancing in-line with their growth, they were sold the

dream that they could achieve anything they set their minds to.

Gen Z, on the other hand, has watched the millennial generation shoot for the stars and miss, and consequently, have an ingrained need for security. This is only heightened when you consider the scary financial and political climate as they came of age. And this fear of failure is reinforced further still when you're born into a post-digital world, where everyone from your peers to your parents are documenting your every move on their smartphones, ready to share your triumphs and (more often) your embarrassments with the social media masses. As a result, they tend to make decisions that make them feel that success is guaranteed and its parameters within their control.



Who are Gen Z?

But it isn't all doom and gloom...

Being connected and driven by security has given this generation the tools to be more resourceful. Often referred to as “DIY-digitals” or even the “side-hustle generation,” Gen Z is likely to use the internet to their advantage by exploring side ventures as an income generator, using e-commerce and vlogging to boost their earnings and their creativity. Which is no surprise when you consider that 97% of teens say they are driven by career and financial security.

Just as self-reliance is a product of access to information and possibility, so too is self-awareness and authenticity. Often described as a force for good, they value brands and influencers that are true to themselves and open up a dialogue to discuss topical issues. This

is a consequence of two significant factors. Firstly, Gen Z is more connected to political and social issues than their predecessors, and secondly, they've grown up sharing and curating content that adheres to their social branding. Gen Z expects celebrities and brands to follow these same levels of transparency and personality.

This online bigger picture has influenced how the Gen Z audience views brands. While millennials have typically valued brand-experiences over anything else, Gen Z sees the experience as part of the product. For example, the millennial-favorite pop-up shop isn't special anymore. When you consider that Gen Z has been thumb-scrolling as long as they've been thumb-sucking, it's fair to say that traditional digital advertising has never been exciting to them. This means

it's hard to get Gen Z to buy into one isolated aspect of your brand or product (unless it's incredibly shareable providing them with social kudos); instead, they judge your whole offering, personality, and ethics. This sounds daunting, but once you have their approval, you've got a customer for life. So, it's worth putting in the effort.

In summary, to connect with a Gen Z audience, brands must:



Be authentic



Have a personality



Pick a side on relevant social issues



Cut through the noise

Gen Z: Where are they?

95% of teens have access to a smartphone, and 45% say they are online almost always. Gen Z is inundated with a massive amount of digital content every day. With so much to scroll through, content must be inherently interesting and offer them something of value in order to stand out.

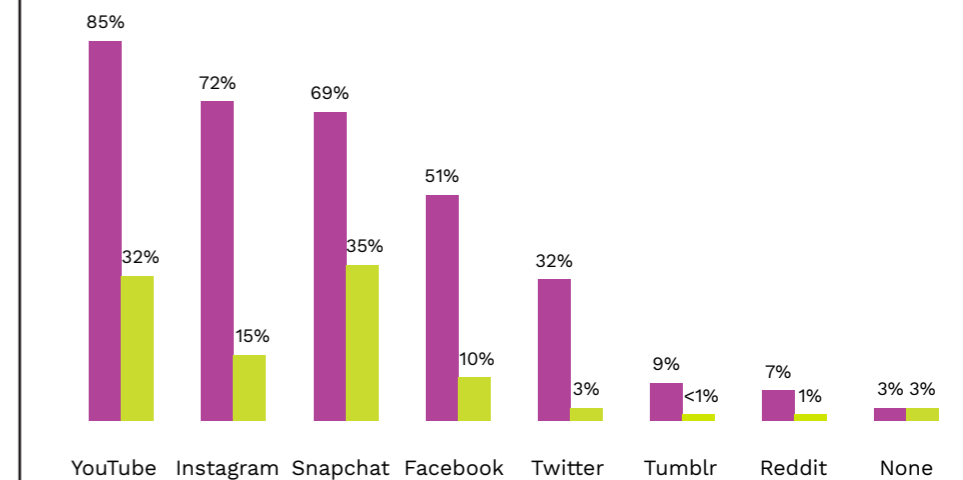
Studies show that 85% of teens are using YouTube (and 32% saying they use it the most out of all platforms). In other words, this platform is the king of content. Instagram and Snapchat are neck and neck with 72% of teens using Instagram and 69% who use Snapchat; however, it's revealed that 35% say they use Snapchat the most which push its relevance into second place behind YouTube.

These trends are consistent transatlantically, the UK student demographic echoes similar behaviors seen in the US. According to Net Natives' Student Media Insights Survey, the industry's leading data source into the channels student use, 73% of British students use Instagram every day, 66% of students head to Snapchat daily, 58% are on YouTube each day, and 53% are on Facebook. Social media is a daily practice to a large portion of students and while this generation uses a variety of platforms each day, YouTube's attainment time is especially noteworthy, when acknowledging that 8% of students have admitted to spending 4 or more hours on YouTube every single day. Only 1% can say the same for Facebook and Instagram, proving that Youtube is a space on the internet where many Gen Zs are residing in for extended periods.

YouTube, Instagram and Snapchat are the most popular online platforms among teens

% of US teens who...

■ Say they use...
■ Say they use most often



These trends are consistent transatlantically, with the American student demographic echoing similar behaviours seen in the UK. Studies show that 85% of US teens are using YouTube (and 32% saying they use it the most out of all platforms) reflecting what was found among the British Gen Zers. In

other words, this platform is the king of content. Instagram and Snapchat are almost neck and neck with 72% of American teens using Instagram and 69% who use Snapchat; however, it's revealed that 35% say they use Snapchat the most which push its relevance into second place behind YouTube.

Gen Z: Where are they?

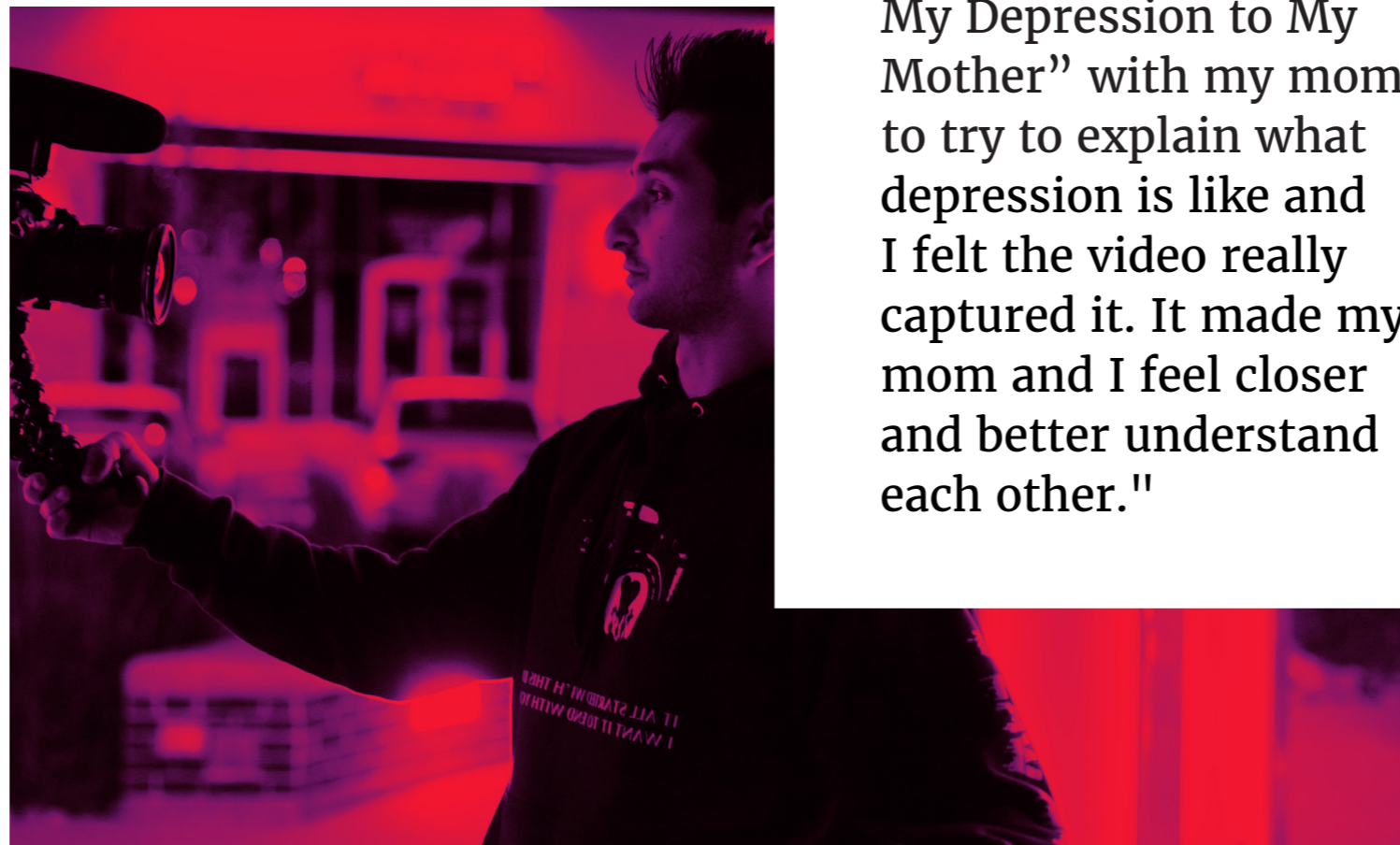
So let's focus on YouTube...

From a recent Google study, it seems like there are two main reasons teenagers turn to YouTube videos - to learn something and to feel connected. The best content does both.

When it comes to learning something, this is pretty straight forward. 80% of teens say YouTube has helped them become more knowledgeable about something, and 68% say the platform has helped them improve or gain skills that will help them prepare for their future.

However, feeling a sense of connection has more layers to it. On the surface, 7/10 teenagers say that watching videos with others helps them feel more connected, and 8/10 teenagers said that they proactively share YouTube videos

with their parents and other adult family members. But when digging deeper, it's clear that social media has broken down traditional boundaries, and for Gen Z these boundaries have never existed as social media always has. As a result, YouTube content is helping teenagers to express and learn from highly personal experiences.



A great example of how YouTube is helping connect Gen Z to a digital community and their families, while teaching them something, is this anonymous response from the same study:

"I shared a video called "Explaining My Depression to My Mother" with my mom to try to explain what depression is like and I felt the video really captured it. It made my mom and I feel closer and better understand each other."

So Generation Z is using content to break down barriers and feel connected to a wider network. This is supported by other popular YouTube trends like immersive shopping experiences, or nighttime routines - both of which offer behind the scenes access to a Vloggers day-to-day. This transparency helps develop a (kind of) friendship - which encourages the viewer to subscribe. With this trend, many celebrities are choosing to break down their fourth wall to post personal videos (from the heart, not their PR team) about their experiences, such as Karlie Kloss - who gets bonus points for mentioning a university in her first video!

And this idea of being part of someone else's fun is evident on other channels like Snapchat and Instagram (who also recently launched IGTV to rival YouTube's

Gen Z: Where are they?

reign over long-form content). The ever so popular Stories functions are giving an exclusive insight into people's daily lives. Instagram also offers new features in Stories like polls, questions, and shopping options, allowing audiences to influence choices, or even buy products that help them to feel closer to influencers.

With this in mind, advertisers with a particular product to showcase should seriously consider incorporating it into YouTube and Instagram content. Especially when you look at statistics such as watch time doubling year-on-year for videos on "which product to buy" and 70% of shoppers are open to learning about products on YouTube from brands. Combining this with influencer content, you're sure to see good results. Those without a tangible product can

use behind-the-scenes content and insider influencer knowledge to produce engaging content instead.



Gen Z: Where are they heading?

As well as the established platforms like YouTube, Instagram, and Snapchat, Gen Z is slowly migrating to other apps to create and share content. TikTok is quickly becoming the most downloaded app from the Apple store. It was created by the merging Musical.ly and ByteDance and is one of the most successful Chinese apps in both the East and West, with 500 million monthly active users..

Originating as a short-form lip-syncing app, it now allows its users to create content in time to existing audio, with creative and hilarious results. Currently,

TikTok is solely user-generated content, but they are slowly experimenting with advertising opportunities (with a recent product deck leaked). With such a young demographic, this is a platform education marketers should keep an eye on.

The outcome is highly shareable, breaking down barriers between content creators and content consumers, which is no surprise considering this generation has grown up editing their own video footage. Videos range from comedic synchronized dancing to dogs tapping instruments or even a young girl miming to a stammering speech by South African president Jacob Zuma.

"THERE ARE OTHER PLATFORMS OUT THERE THAT ARE SOCIAL, AND OTHERS THAT ARE BASED ON ENTERTAINMENT. WE WANT TO BRING THOSE TWO TOGETHER."

**- Alex Hoffman,
Former TikTok North American President**

Gen Z: Where are they heading?

Whether their content is shared to the masses or sent in private messages, teenagers aren't just sending a simple text, or sharing status to describe their feelings. Their digital language is constantly changing, and they require new platforms and creative outlets to express and entertain themselves and others in the process.

Some brands are already taking full advantage of this trend, creating GIFs and memes from existing content to boost engagement, making it applicable

to the audience's lives through humor. GIFs, memes, and videos are constantly being shared between friends in messaging platforms. With 84% of sharing now happening on private social networks like WhatsApp, Facebook Messenger, and WeChat, which is impressive when compared with 9% for Facebook and 7% for all other networks. This is especially interesting for brands, as only a few have found a way to infiltrate this rightfully undocumented space called Dark Social.

Takeaways for advertisers

If we relate our content findings with our audience findings, it's clear that a brand's content must do the following in order to resonate with a Gen Z audience:

- **Be authentic**
- **Have a personality, and a sense of humor**
- **Pick a relevant side**
- **Create a sense of connection**
- **Offer something exclusive** (bonus points for breaking down barriers)
- **Cut through the noise with a social-first strategy**

But what does good *actually* look like?

Well here are a few examples in line with our Gen Z recommendations:

Be **authentic**, and own your existing space

- Domino's: Paving for Pizza
- Stabilo Boss: Highlight the Remarkable

Potholes and highlighters may not be as appealing to Gen Z as new trainers, but these brands are making waves from owning the space in which they operate, and were applauded for it. Stabilo took it one step further and created a broader conversation around the representation of women which felt natural as their method closely linked to their product proving that staying in your lane doesn't have to be boring.

Have a **personality** and a sense of humor

- KFC: FCK
- Burger King: Kanye Tweet, Whopper Detour
- Tide: It's a Tide Ad
- Greggs: Logo Flip and Vegan Sausage Roll
- Ikea: How to Identify an Original Ikea Frakta Bag

KFC managed to overturn a PR nightmare by using a personable approach to copy. This allowed their audience to view them as a flawed human company, rather than an untouchable corporation – an excellent quality for Gen Z audiences who appreciate transparency and personality.

Highlight the remarkable Katherine Johnson. The Nasa mathematician responsible for the calculations resulting in Apollo 11's safe return to earth.





Believe in something, even if
it means sacrificing everything.

 Just do it.

Burger King has also used its sense of humour to troll two American staples, McDonald's and Kanye West. Its approach increased brand affinity and resulted in the most liked brand tweet of all time, as well as topping the app store chart.

While Tide's 2018 Super Bowl commercial provided an Inception-style approach to advertising, blurring the lines between televised advertising and reality.

But a sense of humor doesn't have to cost you a fortune. Greggs' innovative logo flip and the iPhone-style reveal of their vegan sausage roll gave them tonnes of media impressions. Just like Ikea's quick response to Balenciaga making a \$2,145 version of its famous blue bag.

Regardless of budget, what all these campaigns have in common is a personality, which makes their sense of humor feel more human, rather than corporate - something that Gen Z loves. Plus, they reacted in time to the issue, unlike Pizza Hut who tried too hard but missed the deadline, making them the butt of the joke instead.

Pick a **relevant** side

- Coke - This Coke is a Fanta
- Nike - Dream Crazy
- Palau - Palau Pledge
- Always - Blood Normal and #LikeaGirl

Brands no longer avoid topical issues in fear of narrowing their audience, realizing that tackling them head-on can help create affinity with Gen Z's authentic, caring nature. Some brands get this spot on by occupying in their existing sphere. For example, Coke couldn't have picked a more relevant brand issue than overthrowing the Brazilian homophobic slur "This Coke is a Fanta." While Always' "Blood Normal" campaign tackled a problem they were previously contributing to.

Other brands go in with good intentions but find themselves under scrutiny when they don't practice what they preach. It could be argued that "Fearless Girl" was a beautiful work of art, but few remember the business that funded it, so perhaps it failed to advertise their services. In terms of showcasing their business, it seemed to highlight that they were underpaying their female staff.

As a result, some brands have come out with parodies (such as P&G's - "I'd rather get paid") of advertisers with do-good campaigns, but no backbone behind the issue - which Gen Z quickly sees through, as they're wary of fake news and small snippets that ignore the broader socioeconomic picture. And while some people may burn their shoes if brands dare to take a political standpoint, Nike's sales skyrocketed after their "Dream Crazy" campaign with Colin Kaepernick proving it was worth the risk, giving more gravitas to their long-running campaign slogan - "Just Do It."

Create a sense of **connection**

- Nike - Nothing Beats a Londoner
- Marmite - Marmite Gene Project

Creating a community mindset can be achieved in a number of ways. Nike's "Nothing Beats a Londoner" cleverly created hype around a location, offering its target audience something to be proud of. Whilst Marmite's "Gene Project", perfectly targeted the product's lovers and its haters, making everyone feel welcome in the campaign through a

self-aware approach. Campaigns like this offer an opportunity for audiences to shout "I do that too", creating shareable content and a wider conversation which resonates with a Gen Z audience.

Offer something **exclusive**

- Lacoste - Endangered Species
- Xbox - The Franchise Model
- Skittles - Exclusive the Rainbow

From our findings, it's clear that Gen Z prefers exclusive products over millennial's preference for exclusive experiences. But the best in class examples are more creative than a simple, limited edition launch.

Lacoste's "Endangered Species" campaign ticked many Gen Z boxes. They linked an important cause to their logo, creating a limited edition while enabling teenagers to not only share but wear their affinity towards the brand and issue.

Xbox's campaign, "The Franchise Model" was equally clever, and tapped into Generation Z's love of exclusivity, and their side-hustle digital mindset, winning them several awards in the process.





Both of the above campaigns stayed in their brand's sphere, and although creatively thought outside the box, they weren't too out there. Skittles, on the other hand, took a whole new approach to the idea of combining exclusivity and advertising - and decided to show their Super Bowl commercial to only one person. Although ambitious, it failed to create a buzz outside of Adland; as Gen Z doesn't care for isolated, one-off experiences or spectacles - and many were too young to recognize David Schwimmer!

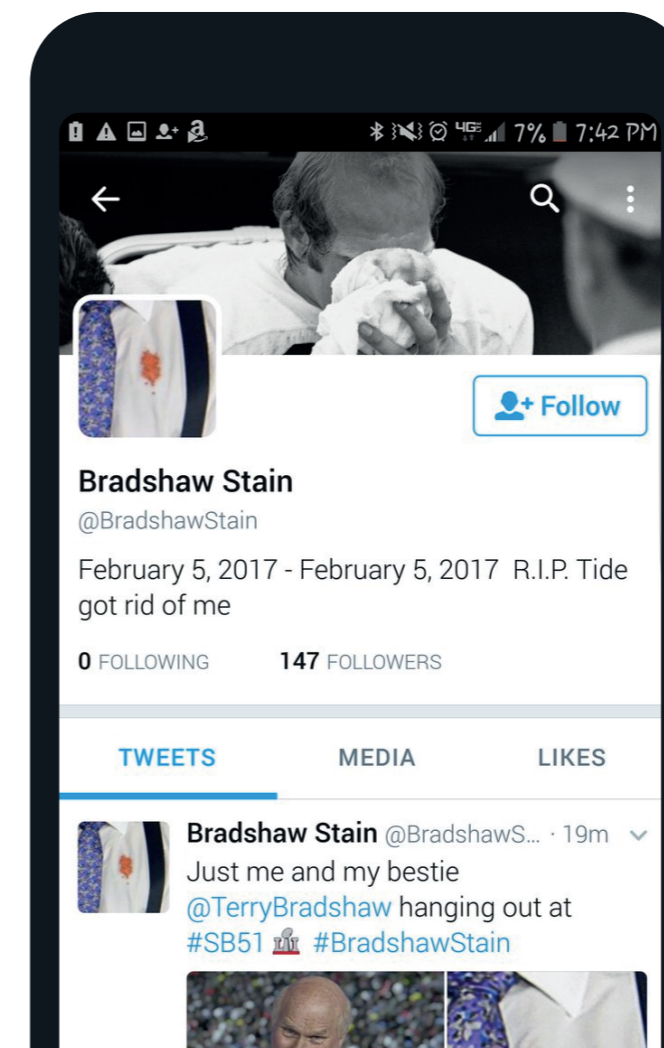
Cut-through the noise with a **social first strategy**

- Adidas - Tango Squad
- Three - Pufferfly
- Blue Planet - Bespoke Meme Campaign
- Under Armour - Break the Game
- Tide - Bradshaw Stain
- Burger King - Connected Whopper
- MailChimp - Did You Mean Mailchimp?
- BETC - Like My Addiction
- Delta - Delta Dating Wall

Thinking outside the box in the name of relevancy and shareability leads nicely to our final recommendation. A social-first strategy increases both of these factors immediately, as it feels at home on the social platform it was intended for, which can help cut through the clutter.

Some of the examples listed above play perfectly into our Gen Z insights, most predominantly Adidas' "Tango Squad", which cleverly combined exclusivity, micro-influencers and dark social to create brand ambassadors from the ground up.

While Three's integrated campaign - "Pufferfly" - featured everything from



outdoor, to Snapchat, to GIF stickers, ensuring the creative was as shareable as possible by creating an aesthetic similar to Gen Z's homemade content across Stories platforms.

Under Armour's "Break the Game" and Tide's "Bradshaw Stain" both tapped into the knowledge that Gen Z is more likely to be in front of two screens, the TV and a smartphone. These campaigns gave their audiences something to talk about in the commercial breaks, creating a connection via community conversations.

So what can the HE sector take away from this? It's all well and good to show you a variety of Cannes Lion winners and personal Net Natives favourites, but how can this be applied to the unique realm of Higher Education? Below are some excellent examples of how universities are appealing to their Generation Z student population whilst following our recommendations.

Be authentic

■ Georgetown University - Stories

There's nothing more authentic than offering back-stage-access to university life, which is precisely what Georgetown University did by creating multimedia, first-person documentary series following the lives of 18 undergraduate students throughout the year as their unique "Georgetown" stories unfolded.





Pick a **relevant** side

- University of Reading - Viral Tweet
- University of Hull - My Plastic Pledge
- Universities UK - Made at Uni

The British university, University of Reading found themselves trending last year when they told those who had a problem with them offering 14 scholarships to refugees to “jog on.” Although this may have divided Twitter, it resonated with their Gen Z audience - who want brands to stand for something and appear more human.

The University of Hull, in Northern England, is also a prime example of picking relevant issues to champion. Off the success of their Break the Chain campaign, shedding light on modern-day slavery, they continued to shout about relevant issues in the form of their 2018 “Plastic Pledge”, which encouraged everyone to make a small pledge to reduce plastic waste reaching our oceans - a topic close to their hearts, location, research - and one Gen Z is passionate about.

In fact, it’s surprising that we don’t hear more universities standing up for people or research, considering their students, lecturers, and research often fuel our progress across a number of fields. This was made clear by Universities UK’s recent national campaign - “Made at Uni,” proving there’s a wealth of content to tap into.

Have a **personality** and a **sense of humour**

- The University of Wollongong - Student Recruitment Campaign

The University of Wollongong also found success from their 2018 student recruitment campaign, whose copy took a similar approach to the Economist’s famous Tone of Voice. By pairing clever outdoor, like: “Because the only thing stuck here is this sign” with a video that conflated school leavers’ apprehensions with graduate experiences. The result was a campaign that resonated with their Gen Z audience.

Create a sense of **connection** or community

- Georgetown Stories
- Brunel University of London - #goingtobrunel
- Western Sydney University - Deng Thiak Adut Unlimited
- University of Tennessee - Dolly Parton Tweet

Universities are super-skilled at creating a sense of community on campus, but many fall short when incorporating this into their campaigns. The examples outlined here offer several different ways you can use internal or external advocates and influencers.

When it comes to incorporating Gen Z favorites, such as utilizing internal advocates and offering behind-the-scenes access, the previously mentioned “Georgetown Stories” campaign is a great example. By following 18 undergraduates journeys, the university relied on existing influencers - which is an approach we think will take off. It’s well worth a YouTube search to see if you need to build an influencer network from the ground up, or if there are any existing

Vloggers with a large following you can welcome into your content team.

The British institution, University of Brunel also created a community across social media, which they commendably managed to achieve before anyone had stepped foot on campus! Every student who was offered a place at the university during the summer was sent an “I’m #goingtobrunel” branded t-shirt, and a welcoming postcard, sealed in a silver envelope. This amounted to a mass of selfies across social media, and was so successful that existing students and alumni began requesting t-shirts too!

Other institutions have used alumni or celebrities to create a sense of connection, prioritizing their community spirit over a physical community. Western Sydney University, created an emotive video showcasing the triumph and overcomings of Deng Thiak Adut, and is sure to bring a tear to your eye. The content showcased the full possibility of combining individual spirit with a supportive community. Whereas, the University of Tennessee had a stroke of luck when Dolly Parton endorsed their class focused around her journey to stardom.





Offer something **exclusive**

- BI Norwegian Business School - A Flying Start

But if you don't have a celebrity to hand, why not create your own? That's precisely what the Norwegian Business School did with their campaign "A Flying Start." Offering one lucky international student an introduction like no other, including billboards with their face on all over Oslo, a short documentary about them on national television, and drink dispensers unlocked by the correct pronunciation of their name - unlocking (you guessed it) drinks with their face on! Despite focusing on an international audience, rather than a Gen Z audience - the exclusivity and social bragging rights would attract teenagers too.

Cut-through the noise (with a social-first strategy)

- University of Hull - Find Liam
- Universities UK - They Said

Social-first content can take two approaches, it's either planned for a specific mobile platform from the get-go, or it's a spur of the moment stroke of genius. Our first example is definitely the latter and won a number of awards for their quick-thinking. When teenager Liam Scroggie opened his results live on Good Morning Britain, a national favourite, he didn't get the grades to secure his first choice and told reporters he'd look towards his other option - Hull. The University of Hull quickly jumped into action with a viral campaign to "#FindLiam," which resulted in him

They said...

it was a Mickey Mouse degree.

accepting a place. By reacting to the content in a personable, caring manner and creating content the nation could get behind, Hull cut through the clearing noise as a force for good.

An advocacy organization for UK universities also wanted to create a conversation online - creating advocates for university amidst the negative news conversation. Together with Net Natives, they scoured the country for stories of alumni who had proved their doubters at university wrong. With mobile in mind from the beginning, the production team filmed 15-second vertical videos (to the dismay of the cameraman, who spent the whole day at a 90-degree angle). The team then designed the aesthetic to mimic the style of personal Instagram stories, ensuring that any individual or university could adopt the campaign for themselves.

The key takeaway

To craft campaigns that will resonate with Gen Z, brands can't afford to simply replicate what they're doing for Millennials. You must use your voice, stand tall for issues that matter to Gen Z, and practice what you preach. Gen Z is exceptional at spotting "fake news", and that's brand intentions and strategies included.

Without engaging this new generation on its own terms, it quickly becomes impossible to capture the concerned hearts and protected wallets of Gen Z. It's simple really: You can't speak the language of one generation and expect to grab the attention of another.

About Net Natives

We're Net Natives. The student specialist marketing group. We are **Connected and curious.**

We **think student.** We do, we learn, we refine, and we apply what we've learnt, just like students (and let's face it, we could all be a bit more student).

The **Impact** is something to aspire to - looking beyond impressions, reach, clicks, conversions and inspiring a focus on the bigger picture. More students enquiring, applying, and enrolling.

We can help you understand your brand, your audience, their needs, and behaviors with unrivaled insights and data.

We can help you reach students in the right place, on the platforms they're using. Attracting students at the right time and making a meaningful, personalized connection that builds trust and loyalty.

Sound good?

Let's work together.

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