

Spilling The Tea On Gen Z

Understanding MENA's Youth In A
Connected World

GAME CHANGERS





Introduction: MENA's Generation Z

Generations are typically defined against larger traits that are a product of the time they are born in. There are the Baby Boomers who are a generation that grew in affluence and consumerism and still have enormous influence on their economies. Their successors, Generation X, saw and drove a shift in societal values; moving from the more family focused Baby Boomer mentality to one of self-actualization. Millennials witnessed the transition of technology from analog to digital and further heightened Gen X's sense of self-actualization becoming the "me-generation". Finally, today's up and coming generation, and the coveted subjects of many marketers and brands, are Generation Z; digital natives born into the era of social media.

While nuanced, these definitions largely stand true across borders; specifically, in recent years where the internet has leveled the global playing field. Connectivity and the rise of an "influencer generation" has allowed for a cross-cultural exchange bringing people closer in thought and principle. However, and as a result of this latest generation who want to build a more distinctive identity for themselves, a rise in localization is trending.

Gen Z in MENA are taking inspiration from their global counterparts and adapting it to fit their surroundings and culture, despite the challenges that may come with it; which begs the question: is there a unique MENA Gen Z experience? Or does the universality of youth extend itself to this region?

To understand what this generation is all about and to explore MENA's influence on them, Ipsos spoke with Gen Z'ers across the region to understand what makes them tick. Through 10 focus groups conducted in Morocco, Egypt, Jordan, UAE and KSA, we discussed a variety of issues ranging from connectivity and influence, to exploring their expectations from brands in today's digital world, so we can uncover the opportunities available for marketers to truly connect with them and create relevance.



Making Their Mark

Gen Z'ers in MENA are the quintessential youth; their days consumed with studying and their free time filled with activities with their friends. They relish social interactions and enjoy going out, trying new things and meeting new people. And although they have all the traits of the typical teenager, there is a depth and experience to this generation that makes them older than their years.

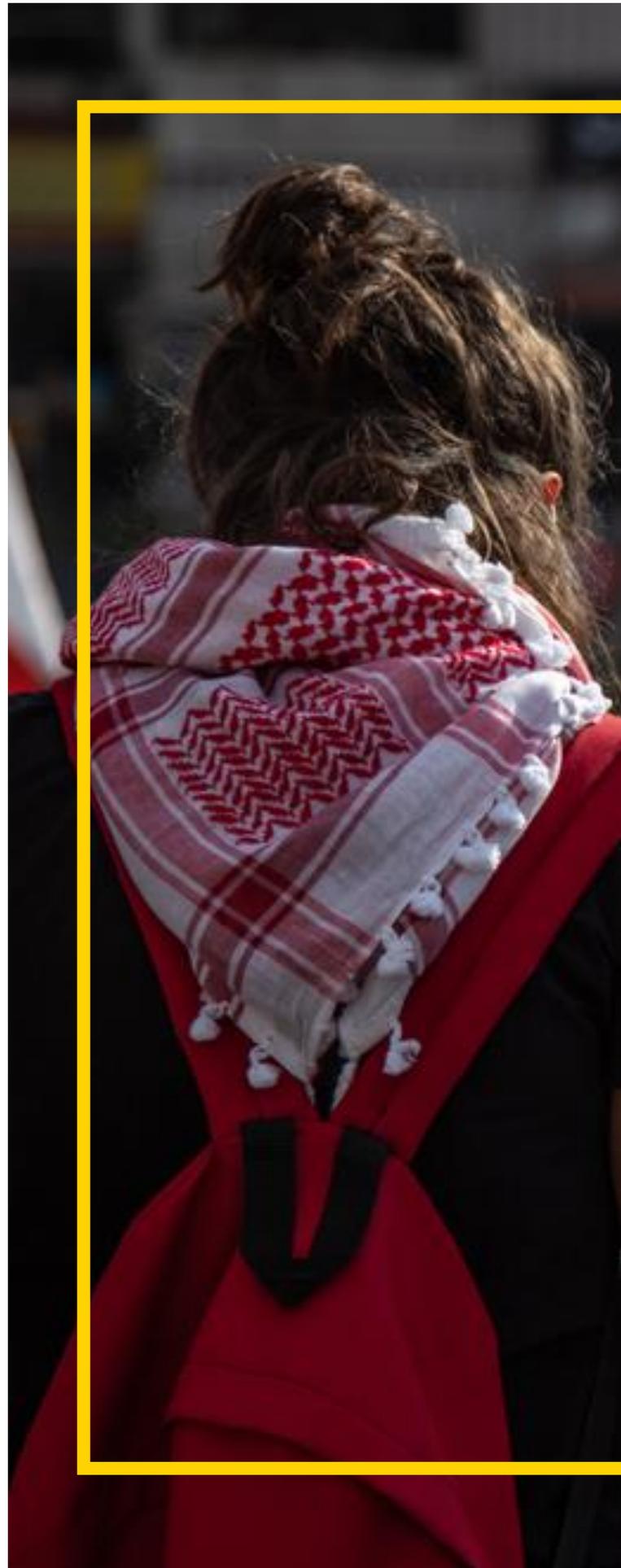
A cumulative result of living in MENA and being born into a digital age, this generation is educated, principled, and ambitious. They take pride in their heritage and particularly in the aspect of Arab hospitality as it distinguishes them from other places in the world. This sense of hospitality and community is deeply rooted in their upbringing and as such, they are keen on building close relationships with those around them to attain a sense of comradery and belonging.

*Their definition of success is the ability to **choose**, the ability to **think** for themselves and the ability to **be heard**.*

Living in MENA has also opened their eyes to the promise of potential. They are witness to a slow but steady progression in their countries that gives them hope. They see a shift in the general mentality that is becoming more openminded and accepting of change, which brings with it an excitement and ambition to do more as some traditional boundaries are broken and new opportunities arise.

Eager to take on these opportunities, Gen Z aspire to independence and status that will allow them to make their mark on society and affect change. The entrepreneurial spirit of their millennial predecessors remains, as they strive to spearhead their own businesses and create a platform that can let their voice be heard. Of course, wealth and financial stability are key goals, but they seek a deeper sense of freedom and leadership.

Their definition of leadership and change is where we see what is markedly characteristic of their generation. Where previous generations aspired to secure a strong career in medicine, law or engineering, (stereotypically the more successful career paths of their time), Gen Z aim to pursue their passions, regardless of what they look like. Their definition of success is the ability to choose, the ability to think for themselves and the ability to be heard. To that effect, Gen Z in MENA are willing to venture into the unconventional in order to stand out and will create their own opportunities if other solutions are not readily available.





Cautious Challengers

Contrary to what may seem like notions of the young and foolish, this generation is far from naïve. They are attuned to the challenges surrounding them, and while not impossible, they recognize that their dreams are generally frustrated by economic and social barriers.

Despite their young age, they worry about their future careers; and in the face of a scarce job market and toughening competition, they resent unjust systems that promote nepotism. Quality education that can prepare them for a demanding workplace is expensive and not available to everyone, giving privilege to those already privileged. And among the few that are afforded that luxury, tradition binds them to a limited school of thought, and they don't have the freedom to choose their path as some fields such as music, the arts or sports, aren't seen as serious or sophisticated enough by society.

*Gen Z still **confine** themselves to what is **socially acceptable** so as not to negatively stand out*

Socially, they face even harder challenges as culture dictates much of what is deemed acceptable behavior. Relationships and outings are muted so as not to be judged. Their clothing remains conservative in order respect their surroundings. And despite gender roles being broadened, and the ever-archaic expectation of getting married and starting a family delayed, Gen Z still confine themselves to what is socially acceptable so as not to negatively stand out. As a result, they adopt a passive “live and let live” mentality that projects an outwardly progressive attitude, similar to their counterparts in the West, but opt for slightly more conservative behaviors so as not to alienate their “Arab-ness”.

But, particularly in MENA, being part and product of revolution, they recognize the power they have in driving change and are undeterred by these challenges. While older generations may see them as lazy and entitled (the usual characterization of any younger generation by their elders), the youth are anything but, and will build support systems among their peers to help them reach their goals.

Digital Dictates

Their status as a connected generation lends them the confidence and ability to push past these obstacles and brings hope and a sense of optimism that only fuels their ambition to do more. They have access to so much information and so many resources that their outlook on life is vastly different than that of older generations. Through digital means, they have the tools necessary to make positive strides in their future, no matter how discouraging times may seem.

*There is a stronger “**digital first**” mentality that dictates the way they do almost everything*

In the context of connectivity, it may seem that Gen Z are just an extension of the millennial generation; however, the key differentiator between them is in the way they consume technology. Millennials have learned to use digital tools as just that – tools (and quite well, at that). And although they have pioneered their own digital advancements, technology remains a tool for self-fulfillment of the millennial “me” agenda.

For Gen Z, connectivity comes even more naturally. There is a stronger “digital first” mentality that dictates the way they do almost everything, from socializing, to looking for information, moving, shopping and staying healthy. Technology is easier for them to manipulate in their day to day dealings and is more seamlessly integrated in their lives, which in turn helps them use it as a platform for the collective, as well as the self.

In understanding the collective, it’s important to note that this isn’t a nod to a philanthropic or activist nature, but rather speaking to a community of exchange and sharing. Growing up in the era of social media, they have manifested the “social” aspect and have created a digital world in which their whole lives are supported. Their education is expanded online as Google becomes their most important teacher. Careers are born through a new sharing economy that lets them monetize on their talents. Hobbies are enriched through tutorials on YouTube. Aspirations are motivated through Instagram. And even on the controversy of social media having isolated personal relationships, friendships are kept close through the sharing of their most intimate daily tasks through SnapChat.





The Conflict of Connectivity

Where connectivity gives them opportunity, it is a double-edged sword; one they navigate carefully. Hyper-connectivity gives way to a rising trend of cyberbullying, an issue many Gen Z'ers deal with daily. In an age of Instagram and influencers, there's an increasing pressure placed on this generation to be perfect, the stress of which makes them conflicted in their views towards technology. They worry how the same technology that gives them so much exposure, can also expose them and their assumed short-comings.

As a result, they censor themselves by carefully choosing what to post and where, with different platforms playing a different role in building their online personas. The Instagram persona is the most public, and posts on this platform are carefully curated to emphasize their trendiness whether it be in the latest fashions, most exotic travel destinations or the latest hot spot in town. SnapChat, on the other hand, is where they feel more comfortable sharing their true day to day lives with the close friends that they've allowed to follow.

*They worry how the same **technology** that gives them so much exposure, **can also expose them** and their assumed short-comings.*

This contradiction is typical of the way the internet has shaped their lives as a generation and extends to other areas of their lives. Gen Z'ers place a lot of value on individuality and finding their own unique path, but it comes in direct contrast to the conformity that consumes their online social space. While the internet gives them the space to explore their own interests, it also imposes a larger influence on what is seen to be acceptable and in; so, to truly stand out ultimately means achieving a common ideal, doing it first, and doing it the loudest.

Experience Reigns Supreme

With this in mind, Gen Z'ers try to strike a balance between the bespoke and the conventional to make sure they're in the know, and ahead of the curve. They are diligent in staying informed on the latest around them to be able to form their own opinions, but unlike previous generations, they look less to the usual authorities for knowledge, and more to experience to guide them in their decisions.

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It is for this reason that the content that they consume is largely created by their peers. They follow travel bloggers to learn about new cultures and foreign experiences. For issues on health and well-being, they follow doctors and watch videos on YouTube for "life-hacks" that will help them better themselves. Recommendations from people who have visited certain outlets or tried the newest restaurant in town help them decide where they will go next. It's in the experiences of others that they can determine what is relevant to them, as they receive true and tried information that accurately represents what they can expect from a product or service.

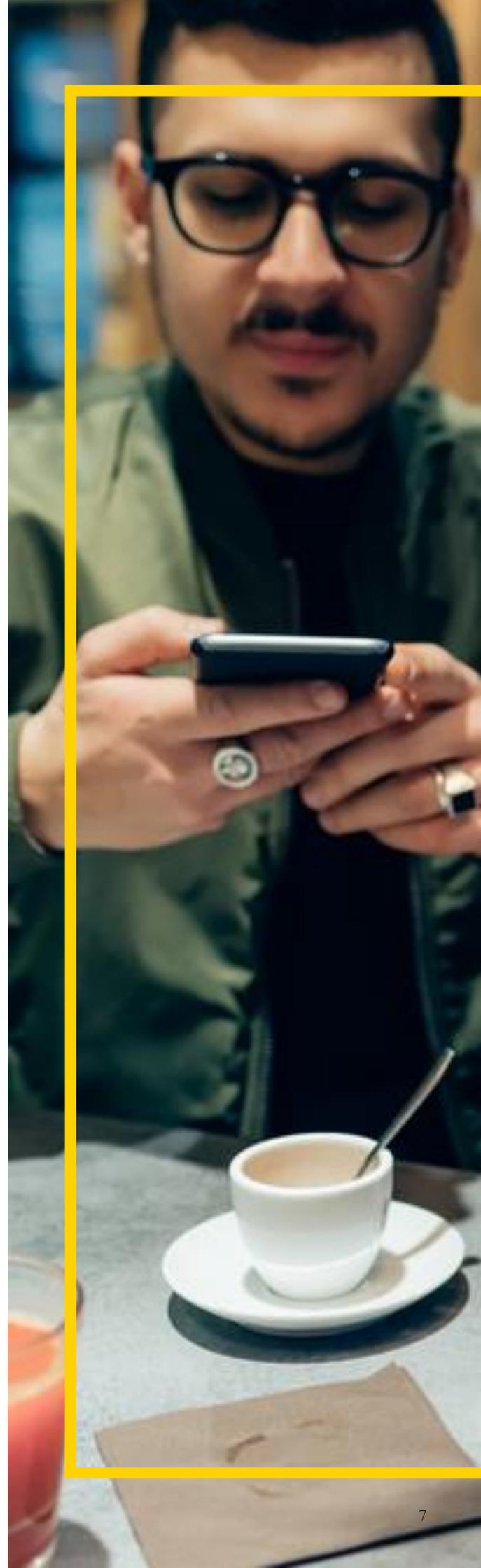
Authentic Influence

It's no surprise then, that they're dubbed the "influencer" generation as they rely on each other for direction and validation. But there is a delicate formula to what constitutes real influence. Gen Z are susceptible to influence where it is genuine and relatable. The status and reach of international celebrities allow them to set trends and define the next hot topic, but Gen Z'ers are more likely to respond to people who look and act like them. They look to influencers for information beyond the latest craze and follow those who help them in cultivating a well-rounded world view. In this case, local or regional influencers are oftentimes more credible, as they provide commentary on issues that are close to home and can re-create aspirations in their own likening.

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The true appeal of the influencer is in their experiences and their ability to build rapport. Their fame is somewhat negligible; whereby it's how they use their fame to deliver real impact that counts. Gen Z look for advice from people who have achieved what they want as it provides a positive end game. And despite the pressure to measure up, they relish the challenge since so many around them have been able to do so. For this, honesty and transparency will earn the influencer respect and trust, as they help Gen Z learn from them and better their lives.

Where an influencer will typically fall short with Gen Z is by creating a "herd mentality" of sorts. While a larger number of followers signifies credibility and success, this is where Gen Z may begin to lose interest as their ambition for individuality starts to get muddled. An influencer will influence in so far as they are niche, but once a topic or trend becomes over popularized, it begins to lose its appeal.





Not So Great Expectations

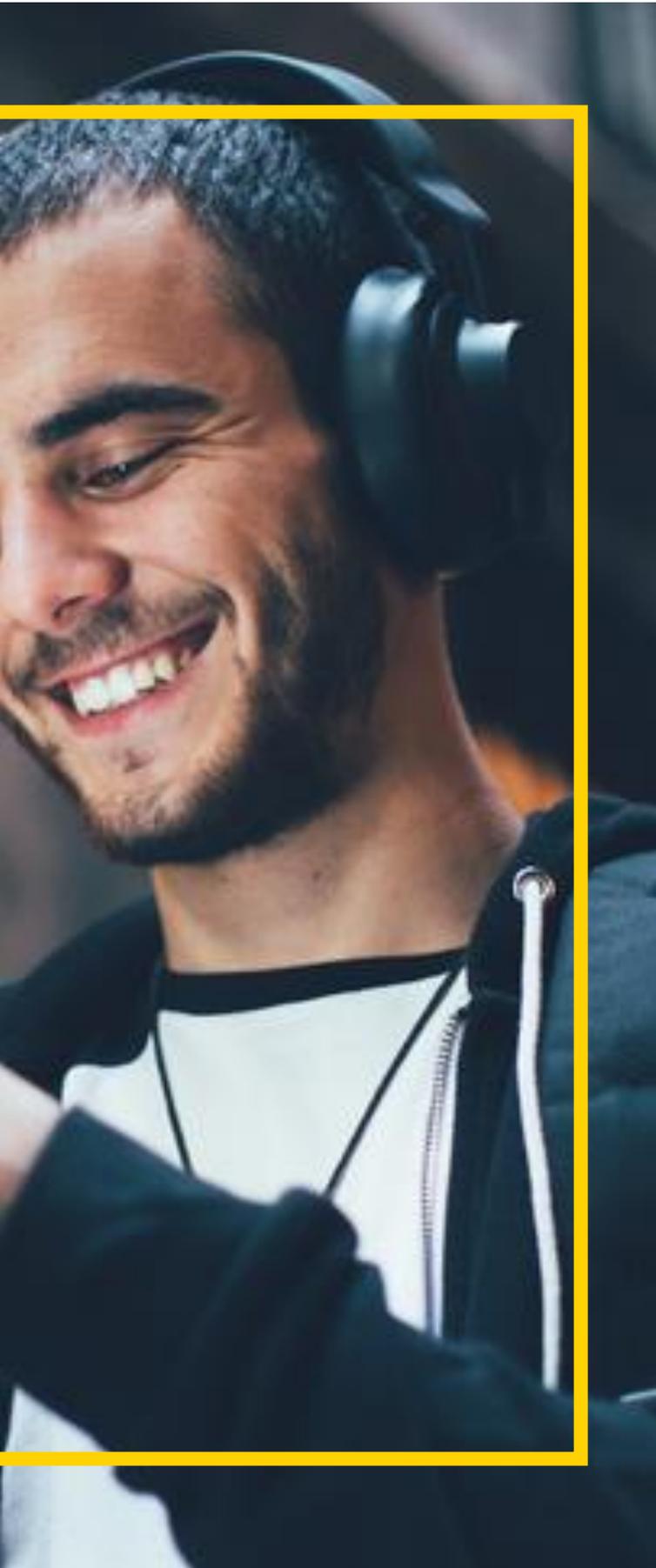
When it comes to brands, Gen Z's expectations of them are a lot more relaxed. In contrast to their relationship with influencers, Gen Z have a generally non-committal attitude when it comes to brands. Traditionally, Gen Z in MENA equate the word "brand" to luxury and aspiration, typically in the form of fashion and trends. When they think of brands outside the retail sphere, they credit international brands such as Apple and McDonalds among the most successful. At top of mind, a brand is only a "brand" if it achieves wide success and an international stamp of quality.

While they acknowledge the emotional benefit of a brand's reflection on their personality and style, what they expect of brands revolves around functional attributes such as quality and price. And for a younger generation that has little disposable income, value for money trumps all. Many Gen Z'ers still don't require brands to move outside their product, so commentary on issues like gender equality, environment and philanthropy become a "nice to have" rather than a requirement. The only exception here is if a brand offends core cultural or societal values; but Gen Z will still be quite forgiving and be undeterred from buying the brand.

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Their favorite brands are successful in fulfilling their aspirational needs and reflect their unique style within the means they can afford. As teenagers, it remains that brands should be young, modern, trendy and fresh for them to be relevant. But more importantly, a brand should be innovative. Gen Z look for uniqueness and want to stand out, but will do so guardedly, as it should be within the confines of what is socially acceptable. While they don't mind challenging other generations, staying current amongst their peers is important; and standing out becomes the new way of fitting in.





The Stories That Stick

Despite the functional demands Gen Z have of brands, brands should still work on building an emotional connection beyond the product features. The way a brand resonates with the youth does in fact go beyond the product features, even if they can't articulate it; and this is typically seen in the way they react to brand's advertising.

The communication that generally resonates with Gen Z is genuine and straight to the point. Instead of lofty promises, they remember advertising that poses a challenge and drives solutions. They like advertising that is creative and smart as it projects the traits they believe themselves to have, or have the potential to achieve. And while they want to see themselves in a brand, they want a better, bolder version of themselves; one that provides motivation.

*Any advertising that can **tell their story**,
or some version of it, is sure to be
successful*

To transcend the confines of their product, brands are required to bring something new to the table, and to evoke emotion. Gen Z respond to communication that highlights something new or responds to a familiar issue in a fresh and creative way. Even in the seemingly less important role of social responsibility, brands are expected to be culturally attuned and transparent, addressing real issues and supporting solutions towards them. They appreciate advertising that highlights local faces and drives inclusion. And any advertising that can tell their story, or some version of it, is sure to be successful.

Bringing it All Together

So how does a brand connect with such a sensitive, ambitious and dynamic youth? As a connected generation, Gen Z in MENA share many qualities with their teenaged counterparts around the world. However, in building a relationship with them, brands need to recognize that although Gen Z take inspiration from the rest of the world, they want to build their own successes; successes that are won despite the challenges they face at home. In this light, brands should focus on providing real experiences, opportunities and tools for change to move beyond their product offerings and create an emotional connection with this segment. To truly resonate with this generation, keep these key take outs in mind:

Help Gen Z Create, rather than create for them. Give them experiences and tools to help them drive change and build solutions so that their success becomes your success.

Provide Inspiration, not just aspiration. In giving them a goal to reach, make sure that there are also learnings that will help them get there.

Build Influence that is in their own image. Use the status of celebrity to prove credibility, but the success of their peers to drive motivation.

Be Genuine in your communication. Move away from lofty promises and show how your brand can affect real change.





GAME CHANGERS

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So that our clients can act faster, smarter and bolder.
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You act better when you are sure.



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