

AdReaction

— Gen X, Y and Z —

AdReaction: Engaging Gen X, Y and Z is the first global study to reveal Gen Z's behaviours, attitudes and responses to advertising to help marketers understand the similarities and differences between the generations and how to effectively engage them.



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FOREWORD

A new generation with different content expectations is emerging

Generation Z, who have grown up with a smartphone in their hand, are now on the cusp of adulthood. Technology is an essential tool that has blended seamlessly into their lives from the start. The digital world is all they have ever known. Brands need to adapt quickly to the values and attitudes of this generation if they expect to keep pace and remain relevant to this audience.

So what defines Gen Z, also known as post-millennials or centennials? What are their characteristics, desires, likes and dislikes? How do they want to interact with brands? How do their

media attitudes and behaviours differ from millennials (Gen Y) and baby busters (Gen X)? And, finally, what do marketers need to know to navigate emerging social trends and cultural norms as they develop content and plan media?

At the same time that Gen Z are emerging, marketers are challenged by the continued fragmentation of media channels. This means they are scrambling to determine how to engage their target audiences – and the number of available options doesn't make this easy. The rapid rise of online video and mobile ad formats makes it hard to know what type of creative will work, and where best to place it.

The previous AdReaction study from

October 2015, *Creative in a Digital World*, showed that digital video viewing minutes matched time spent watching TV. Yet at the same time receptivity to digital ads remained much lower than for live TV ads. It also provided insight into how and why advertisers should adapt videos for the digital and mobile world.

The AdReaction Gen X, Y and Z study goes a step further to explore advertising receptivity across three generations – to analyse and understand when and where each group is most likely to respond positively. It also provides marketers globally with practical advice about which creative approaches work best across the three generations.

Important note: this report summarises the overall global findings of the AdReaction Gen X, Y and Z study, which ran in 39 countries. Quantitative survey results are averaged across the countries. However, some findings vary by country. For country-specific information, take a look at the **interactive dataset**, or contact your local Kantar Millward Brown team.



brands need to adapt quickly to keep pace and stay relevant to a new generation

METHODOLOGY AND DEMOGRAPHICS

The study comprises three distinct research elements that have been combined in this report.

- IDEABLOG online forums in three countries (China, Germany and US)
 - 30 participants per country
 - 31 ads tested in 10 countries
 - Total sample size = 8,986 interviews
 - Approximately 100 Gen Z, 100 Gen Y and 100 Gen X per ad
 - 11 TV, 8 Facebook videos, 12 YouTube videos
 - All interviews conducted via online self-completed panel-based questionnaire
- Ad testing country list:
- Australia, Brazil, China, France, Germany, India, Mexico, Spain, UK, US

QUALITATIVE

AD TESTING

QUANTITATIVE

- Conducted in 39 countries
- Average of 600 interviews per country
- Total sample size = 23,907 interviews
 - Gen Z (16–19 year olds) = 7,087
 - Gen Y (20–34 year olds) = 8,490
 - Gen X (35–49 year olds) = 8,330
- All interviews conducted via online self-completed panel-based questionnaire

Quant country list:

- Africa & Middle East: Egypt, Israel, KSA, South Africa
- Asia Pacific: Australia, China, Hong Kong, India, Indonesia, Japan, Korea, Philippines, Taiwan, Thailand, Vietnam
- Europe: Belgium, Croatia, Czech Republic, France, Germany, Greece, Hungary, Ireland, Italy, Netherlands, Poland, Romania, Russia, Slovakia, Spain, Turkey, UK
- Latin America: Argentina, Brazil, Chile, Colombia, Mexico
- North America: Canada (English), Canada (French), US

EXECUTIVE SUMMARY

AdReaction Gen X, Y and Z identifies both similarities and differences between the generations

We are living in a period of transformative change. Only 18 years ago, the "web" was becoming a household word. Amazon was experimenting with selling music CDs in addition to its core books offering, and something called "instant messaging" was emerging – and failing – to make an impact. Today, with a backdrop of global social and political uncertainty, businesses are under pressure to adapt their models to leverage, and in some cases manage, the power of technology.

Gen Z – born with technology at their fingertips – are now approaching adulthood. Their lives have been shaped by a digital age, and the brands that most want to appeal to them often struggle to understand what

makes them tick, what matters the most to them, and how and when to communicate with them. People who work in the marketing industry are tech-savvy, but experts from earlier generations are now faced with this new group of consumers who are more technologically advanced.

It's all too easy to see the problem as binary: "A new mobile-first generation is changing the world" versus "You can't define people just on their age". While there is truth to both sides, the overall picture is more complex. The AdReaction Gen X, Y and Z study seeks to understand how the youngest adults in our society are different to Gen Y and X that came before them, in terms of their attitudes and responses to advertising. But also, importantly, the study seeks to understand the many similarities.

Gen Z have high expectations of advertising, especially digital

While the AdReaction Gen X, Y and Z study doesn't tell the whole story of how Gen Z have evolved over time, it does pinpoint a shift in attitudes that is highly significant for the advertising industry. Some of the attitudes and behaviours of Gen Z may change as their lifestyles evolve, but their current

differences are very relevant to marketers today. The opinions and behaviours of Gen Z will have an immediate impact on how the marketing landscape develops. Understanding these post-millennials will therefore impact all brands, not just those targeting young consumers.

The first important finding from this study is that developing advertising that works across all generations is tough

It's particularly tricky to get Gen Z to engage, because they are highly discriminating and more averse to advertising in general.

In the online space Gen Z are significantly more likely to skip ads, suggesting they have a lower threshold for boredom. They are also more turned off by invasive, interruptive online and mobile formats. This may be because the digital realm is truly their space, and advertising there is even less welcome than for other generations. Surprisingly, like other generations, Gen Z have a strong preference for ads in traditional media over digital ads – yet even here their attitudes are typically less positive

than their predecessors'.

For media planners, there are a few clear windows of opportunity to exploit. Gen Z prefer short content and they want the opportunity to interact with ads, and to receive rewards for their engagement. They are more open to ads during the day, and to ads in movie and music contexts.

Gen Z have different passion points when it comes to creative content. Two of the best ways to engage them are through music and humour. They also expect a strong and inventive design aesthetic, and they react more positively to celebrity endorsements. All of these preferences come with local cultural nuances. Importantly, these generational creative differences need to be balanced against cross-generational attitudes to issues such as sexuality and discrimination. Responding to these attitudes appropriately can often be fundamental to creative success.



advertisers that most want to appeal to Gen Z often struggle to understand what really makes them tick

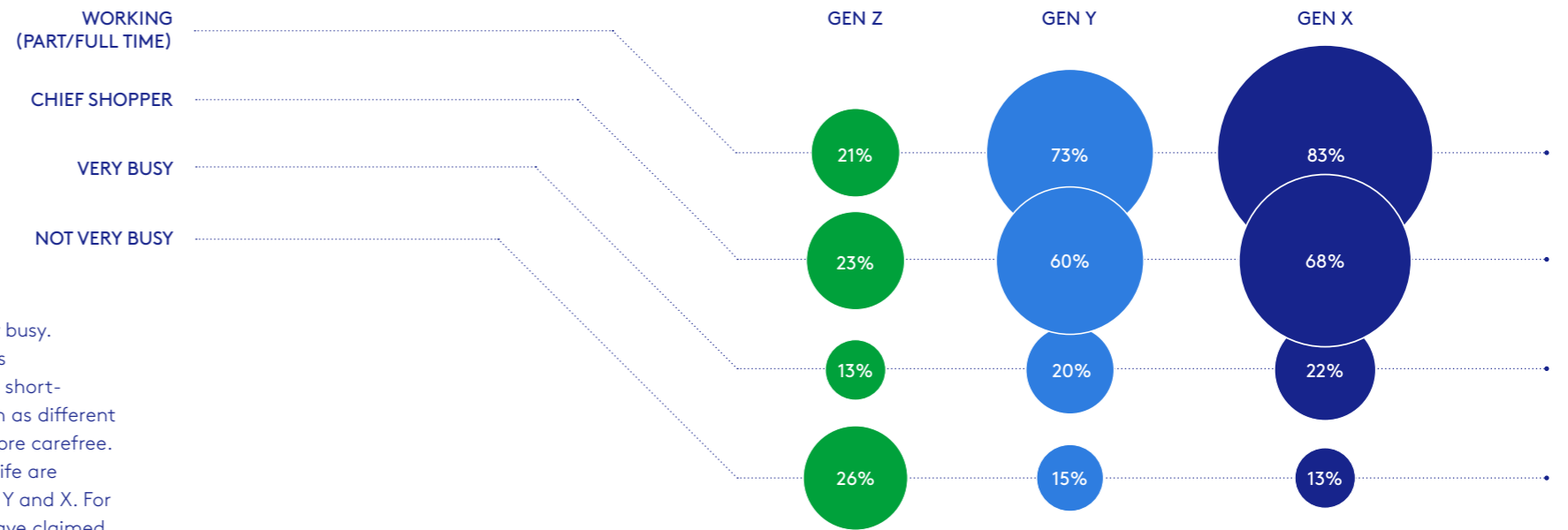


Gen Z are significantly more likely to skip ads



CHARACTERISING GENERATIONS

PROFILE BY GENERATION



Characteristics that make Gen Z different

The first challenge for marketers is to identify precisely how the habits, personality traits and attitudes of Gen Z differ from older generations. Clearly, Gen Z have been raised in a vastly different world, but have changed times resulted in different characteristics?

Since most Gen Z-ers are barely out of school, they don't yet wrestle with adulthood. They have more free time – only a fifth work for a living and a

quarter say they aren't very busy.

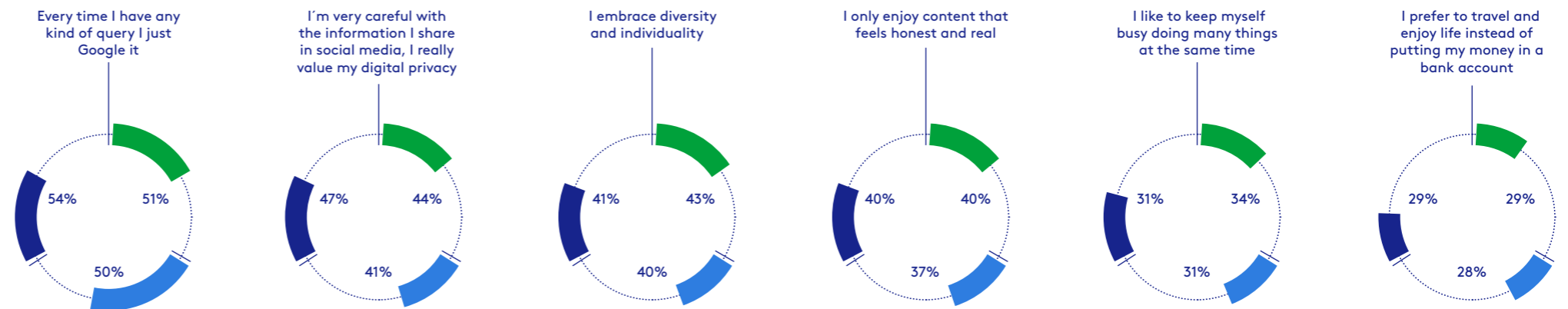
Although their lifestyle is unsurprisingly different, it's short-sighted to pigeonhole them as different simply because they are more carefree. Many of their attitudes to life are remarkably similar to Gens Y and X. For instance, commentators have claimed that "honest and real" content is critical to engaging with Gen Z, but this is equally important to the two older generations. Gen Z do value privacy and diversity, and they do multitask – but not much more than the others.

Gen Z are more carefree because most do not yet have adult responsibilities

Gen Z can't be pigeon-holed based on their age

SIMILAR ATTITUDES ACROSS GEN X, Y AND Z

● GEN Z ● GEN Y ● GEN X



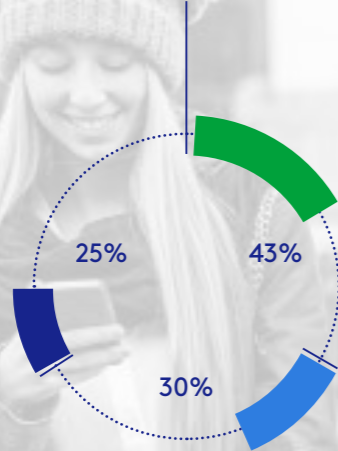
many of Gen Z's attitudes are remarkably similar to those of Gens Y and X

ATTITUDES BY GENERATION

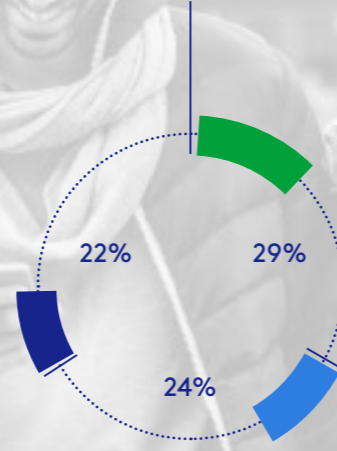
● GEN Z ● GEN Y ● GEN X

Personal

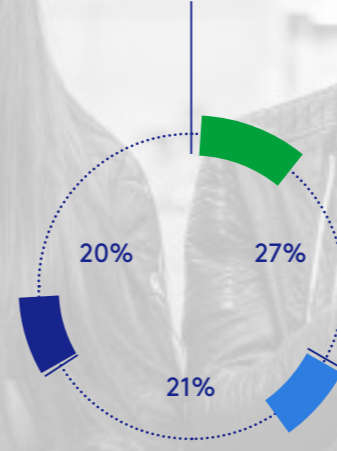
I like to have always-on access to music via digital platforms



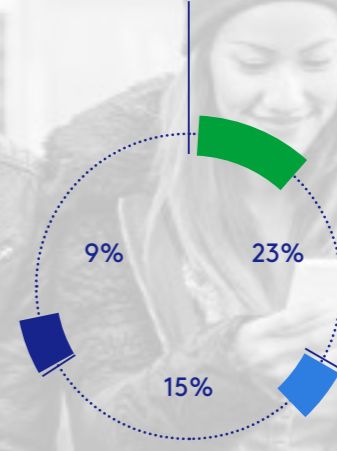
I like to share my activities, interests and hobbies online with friends



I feel that others' opinions of me are as important as my own



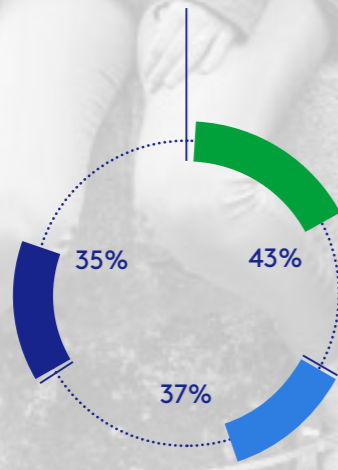
I love selfies



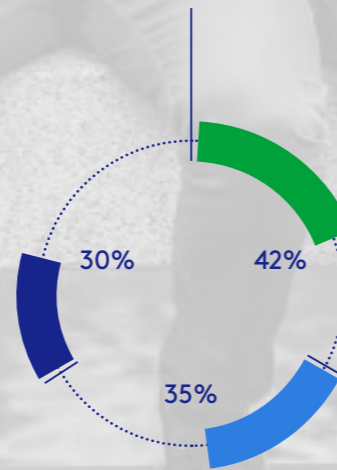
Passion for music, online socialization and the opinions of others are all more important to Gen Z

Work

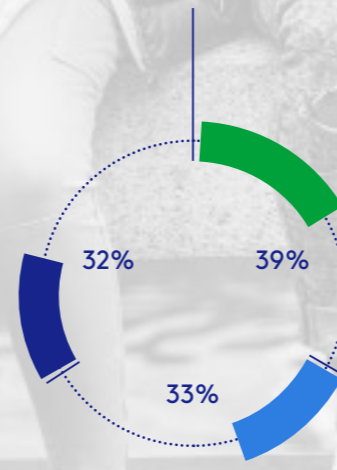
I'm focused on achieving my personal goals



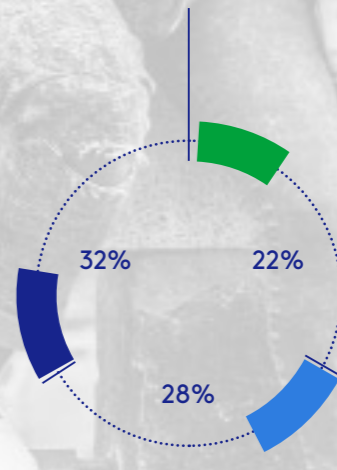
I want a job with the opportunity to grow quickly



I'm convinced that a good CV/ résumé opens the door for good jobs




My job represents an important part of my personality




Gen Z display more ambition in terms of achieving their goals

LEVEL OF SOCIAL MEDIA ACTIVITY BY GENERATION - USE SEVERAL TIMES A DAY

 **China**

"[My] smartphone plays a role as my personal secretary who reminds me of important things, e.g., wakes me up in the morning, transport arrangement[s], call[s] for food, communicate[s] with family and friends. It's like a 24-hour serving robot of my own."

 **US**


"The role of my phone would be best described as my life-line. I use it constantly, as a flashlight, and a form of communication, to look at the weather, news, calendar. It's basically everything I need to keep up on social, educational, and environmental cues on a day-to-day basis."

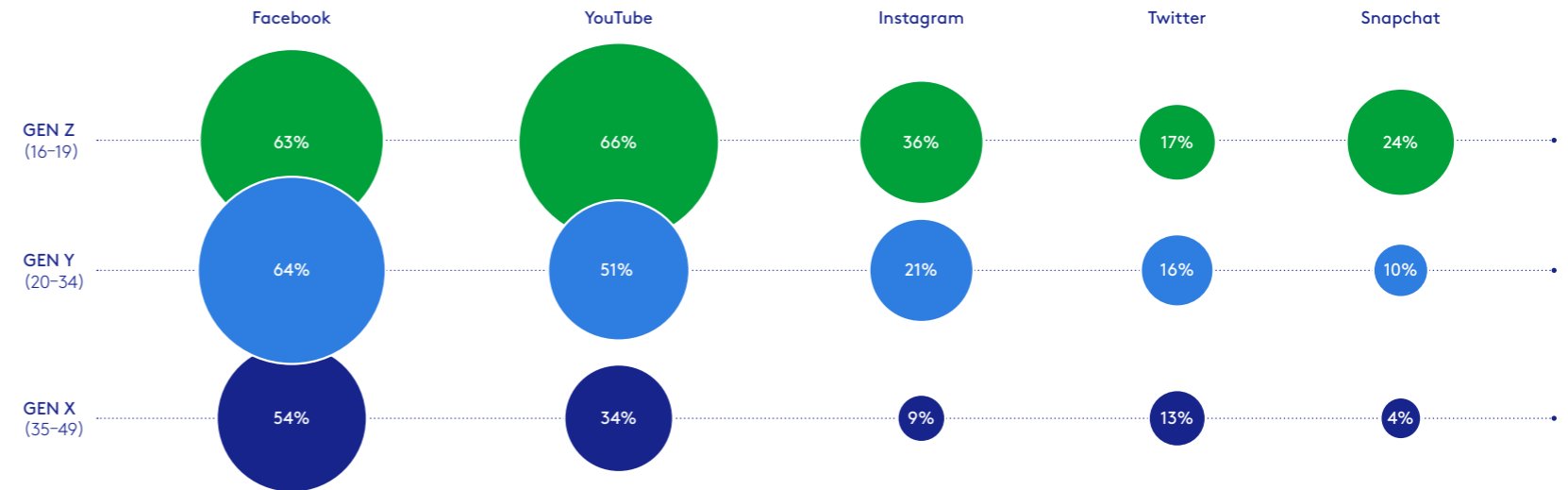
The AdReaction research shows that there are true generational differences in a variety of lifestyle factors—music being the most important. 43 percent of Gen Z are passionate about music—almost double the number of Gen X—and say they like to have always-on access to music via digital platforms. Gen Z also have a more varied and prolific social media presence, and are more likely to be using social platforms beyond Facebook, particularly Instagram, YouTube and Snapchat.

In part because Gen Z access social media more frequently, they spend more time on mobile devices. Three quarters of Gen Z spend at least an hour a day on mobile devices, compared with just

over half of Gen X. Their lives are more bound to their mobile phones and the importance continues to grow. One US participant called their phone their "lifeline... it's basically everything I need to keep up on social, educational and environmental cues", while a Gen Z-er from China said: "It's like a 24-hour service robot of my own".

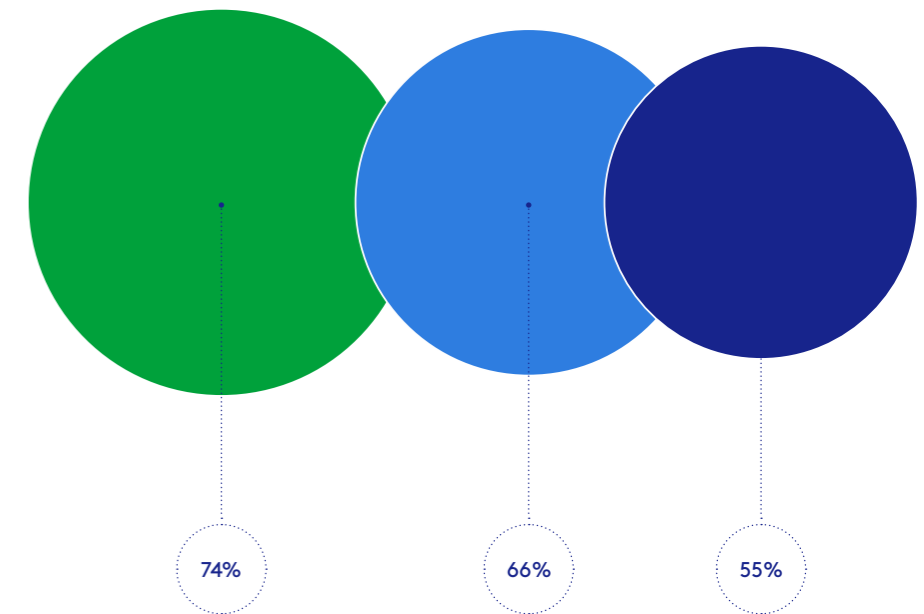
Aside from social media attitudes, Gen Z also display far more ambition in terms of achieving their personal goals and are determined to find employment that rewards those goals quickly.

 **Gen Z are more tied to their mobile phones**



USE MOBILE FOR ONE HOUR OR MORE PER DAY

● GEN Z ● GEN Y ● GEN X



RECEPTIVITY TO ADVERTISING

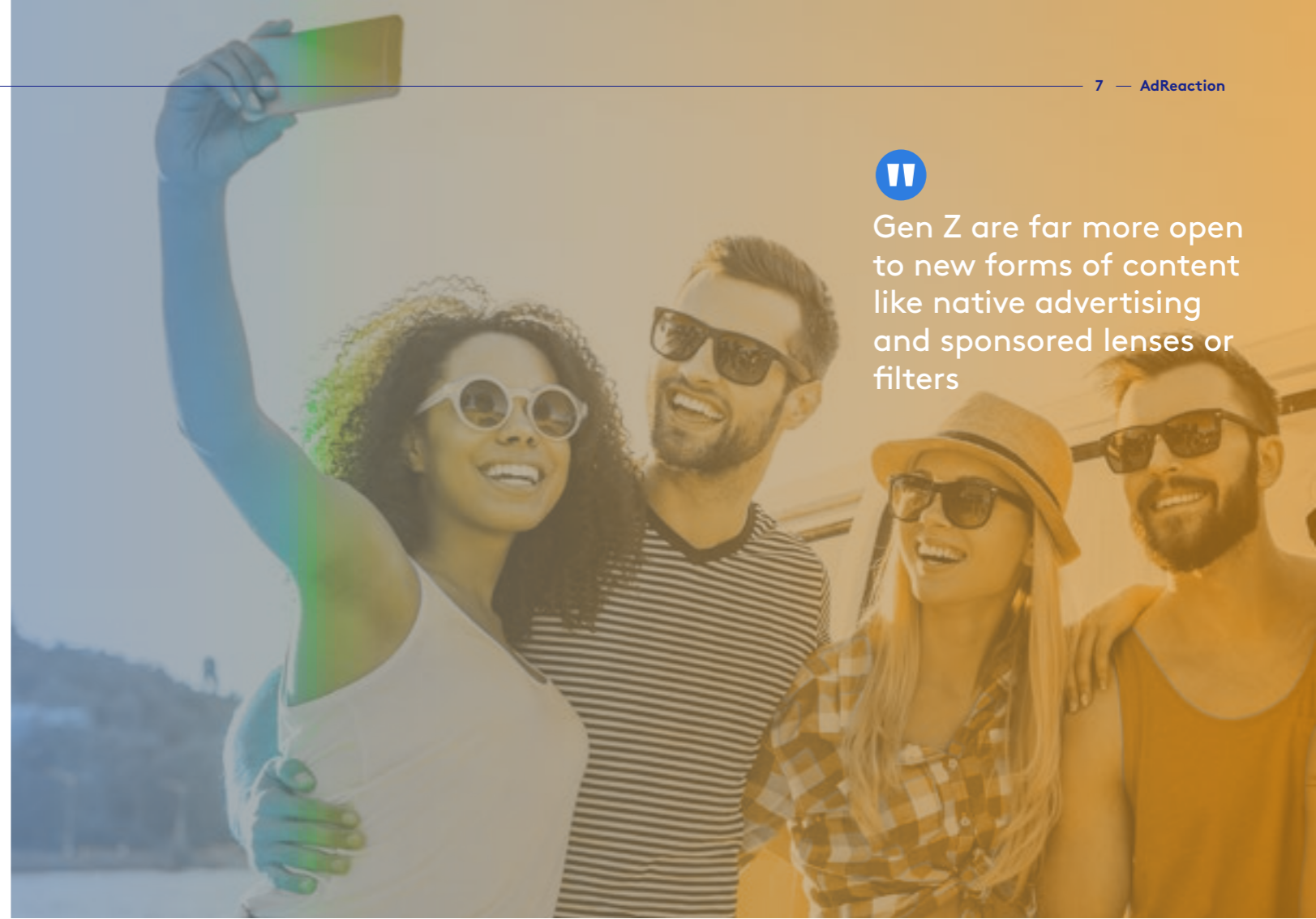
Generations X, Y and Z all prefer traditional advertising to online

Over the years, one thing has remained consistent across AdReaction studies. People are generally more positive towards traditional advertising, and more skeptical about digital forms of advertising. Digital ads may be a part of everyday life, but they're not something people welcome as much as print, outdoor, TV and cinema advertising. This view is shared by all three generations.

Gen Z may be a mobile-first generation, but they do speak positively about traditional media. Participants in

China report that outdoor ads can be "relaxing", while those in the US prefer TV ads because they are "not just things I've Googled" and the creative on TV is "exciting and interesting".

But while the hierarchy of channels is similar across generations, Gen Z audiences are broadly less positive towards all advertising formats than other generations. Although they are receptive to well-designed, traditional ad formats, this favorability is countered by the fact that they feel overwhelmed by how much advertising they see. Their negative perception of advertising stems from feeling bombarded by the industry.



Gen Z are far more open to new forms of content like native advertising and sponsored lenses or filters



Germany

Ads can at times be overtailored: "You look something up on the web and then you see the respective ad on Facebook".

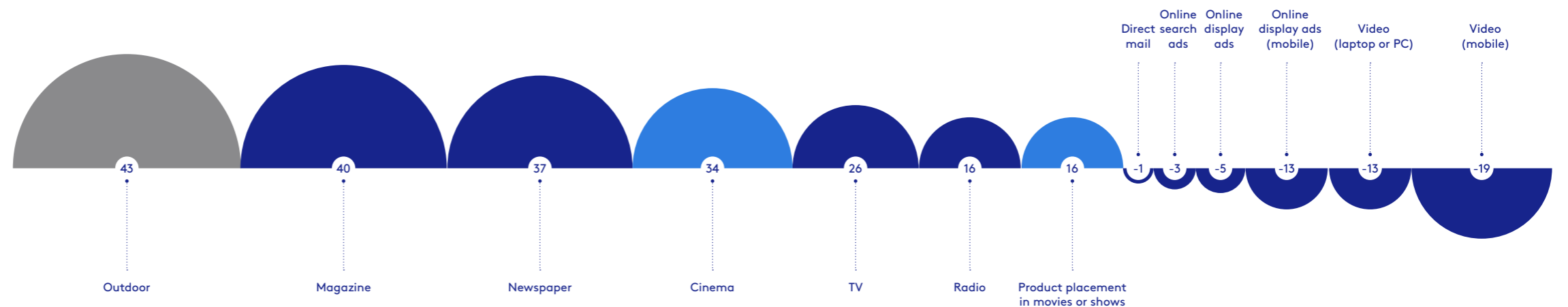


US

"Even though [mobile rewards] are ad[s] it's still giving you something in return for taking the time out of your day to look at it".

GEN Z ATTITUDES TO TRADITIONAL ADVERTISING FORMATS

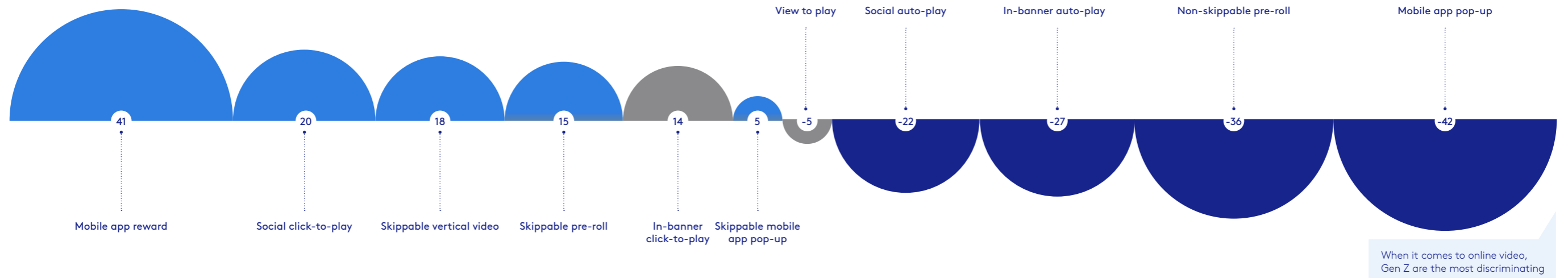
● Higher than other generations ● Same as other generations ● Lower than other generations



GEN Z ATTITUDES TO ONLINE VIDEO ADVERTISING FORMATS

● Higher than other generations ● Same as other generations ● Lower than other generations

NET +VE %



One participant in China complained that ads are sometimes “impossible to avoid wherever we go”. They are also unenthusiastic about ads that are “over-tailored” based on their digital history.

This means that, across all channels, Gen Z audiences are constantly – and consciously – making decisions about whether to avoid or engage with the advertising they see. Though there can be nuances from country to country, Gen Z audiences are consistent globally in their desire for engaging and relevant content across all channels.

Advertising attitudes differ most across generations when it comes to digital video. Gen Z are far more discriminating than their older cohorts. Gen Z express real positivity when they are given control to play or not play an ad, and if they are likely to receive rewards for viewing the content – 41 percent show a positive reaction to

mobile ads that offer rewards. One respondent in the US said: “It’s giving you something in return for taking the time out of your day to look at it”.

Equally, Gen Z are far less forgiving when an invasive ad format does not offer user controls, such as non-skippable pre-rolls and pop-ups. But Gen Z are far more open to new forms of content like native advertising and sponsored lenses or filters. These fun, creative and more subtle marketing approaches seem to be something they appreciate more than the hard sell of other formats.

China

“Ads outdoors are well designed and attractive. It’s a relaxing moment to see these ads while waiting for [a] bus or someone.”

BUT

“Ads exist everywhere. It’s impossible to avoid them no matter where we go.”

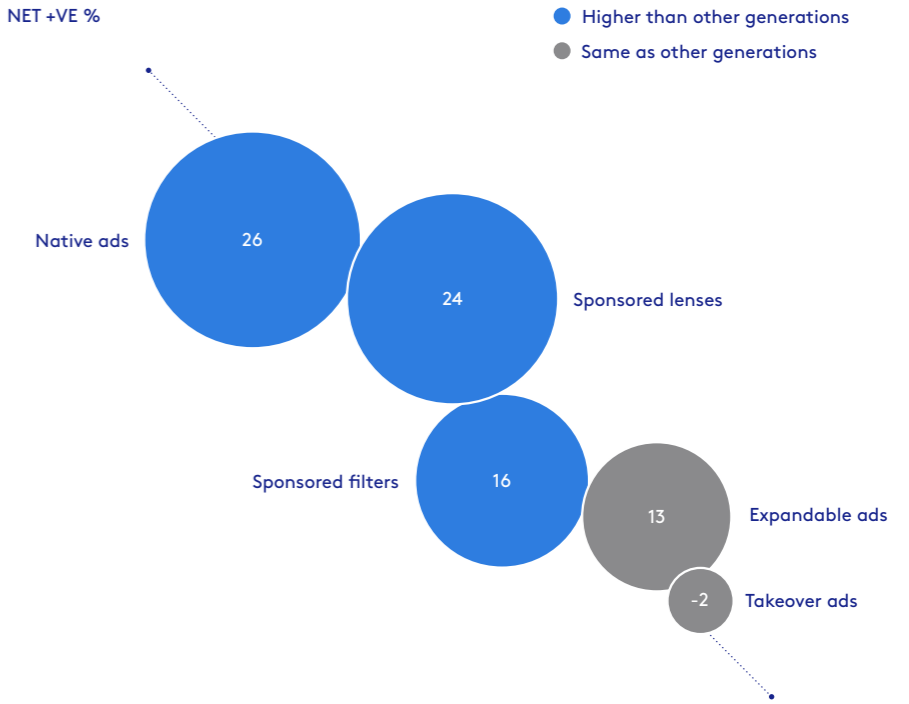
US

“When I see a TV ad I’m more cool, calm and collected than when I see one on Instagram or Facebook. I believe I’m that way because TV has all kinds of ads, not just the things I’ve Googled”.

AND

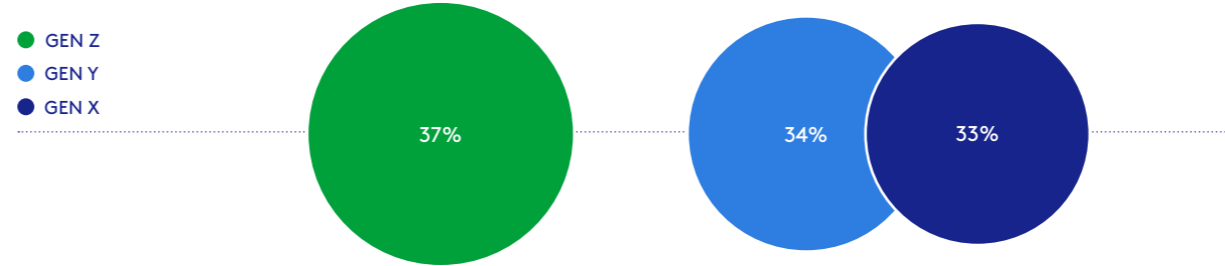
“I feel as though a lot of effort goes in to making [TV ads] exciting and interesting and I feel that they generally accomplish their task. I often find myself interested in something on TV purely because of the quality of the ad and not because of the product.”

GEN Z ATTITUDES TO ONLINE ADVERTISING FORMATS

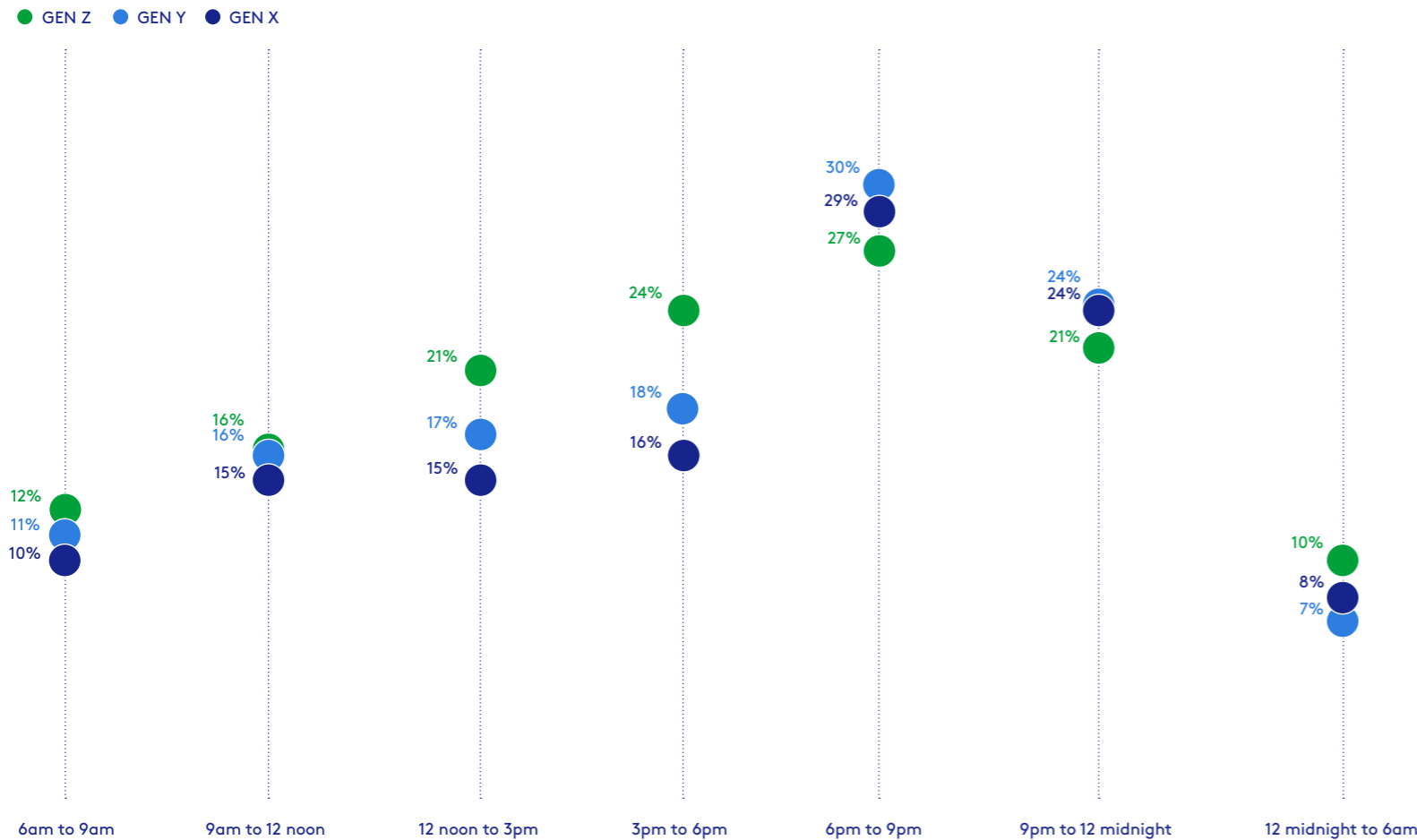


RECEPTIVITY

POSITIVITY TO ADS 10 SECONDS OR LESS



TIMES WHEN PEOPLE ARE MOST RECEPTIVE TO ADS



advertisers targeting Gen Z should distil their messages into bite-sized bits

How advertisers can improve openness to ads

Timing is everything

Targeting people at certain times of the day can improve marketing receptivity. Our data shows that Gen Z are more receptive to ads during the afternoon when others may be at work. But in the evening they are slightly less open to ads than Gens Y and X.

Gen Z are particularly likely to want their ads short – ideally less than 10 seconds. This should prompt marketers targeting Gen Z to consider how they can distil their ads into bite-sized

messages. However, while people – Gen Z included – will always say they want ads to be shorter, there is no reason that brands can't create longer-form content if it's relevant, engaging and inspiring. Brands like Red Bull, Coke and Dove have proved this time and again.

Interactivity matters

Gen Z are also more likely to demand opportunities to interact with ads. They want to feel part of campaigns, and the ability to make collaborative decisions appeals to them, whether that means voting for something to happen or taking some kind of action.

Gen Z's desire for greater control also extends to regulating their exposure to content and deciding what they want to watch. We saw earlier that Gen Z are much less positive towards invasive ad formats. This is confirmed, as they are likewise much more positive to ads when given the option to skip or close.

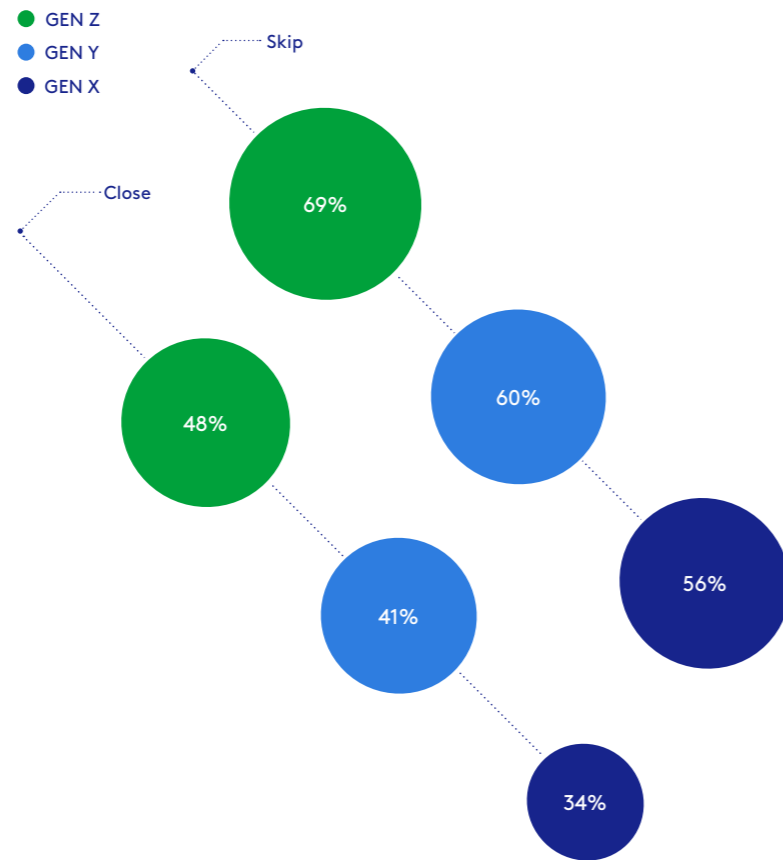
The real problem for marketers is that Gen Z not only want to have this skipping option—they are also more likely to use it. Not only are they more likely to claim they skip ads whenever they can (both on desktop and mobile), our behavioural measurement from ad testing also shows that among those people that do skip, Gen Z skip faster: on average three seconds faster per ad than Gen X.

This often means that even very distinctive and involving ads may be less effective in engaging Gen Z. As part of the AdReaction research, we tested a successful ad for GEICO Insurance. This is a dynamic, funny, James Bond-esque spy parody where the action hero is interrupted by a call from his mom. Attitudinal ad testing results show that the ad is in the top three percent of all ads tested on involvement, and in the top third of all ads on difference. However, our ad testing behavioural measurement from within the YouTube context shows that Gen Z are much more likely to skip away.

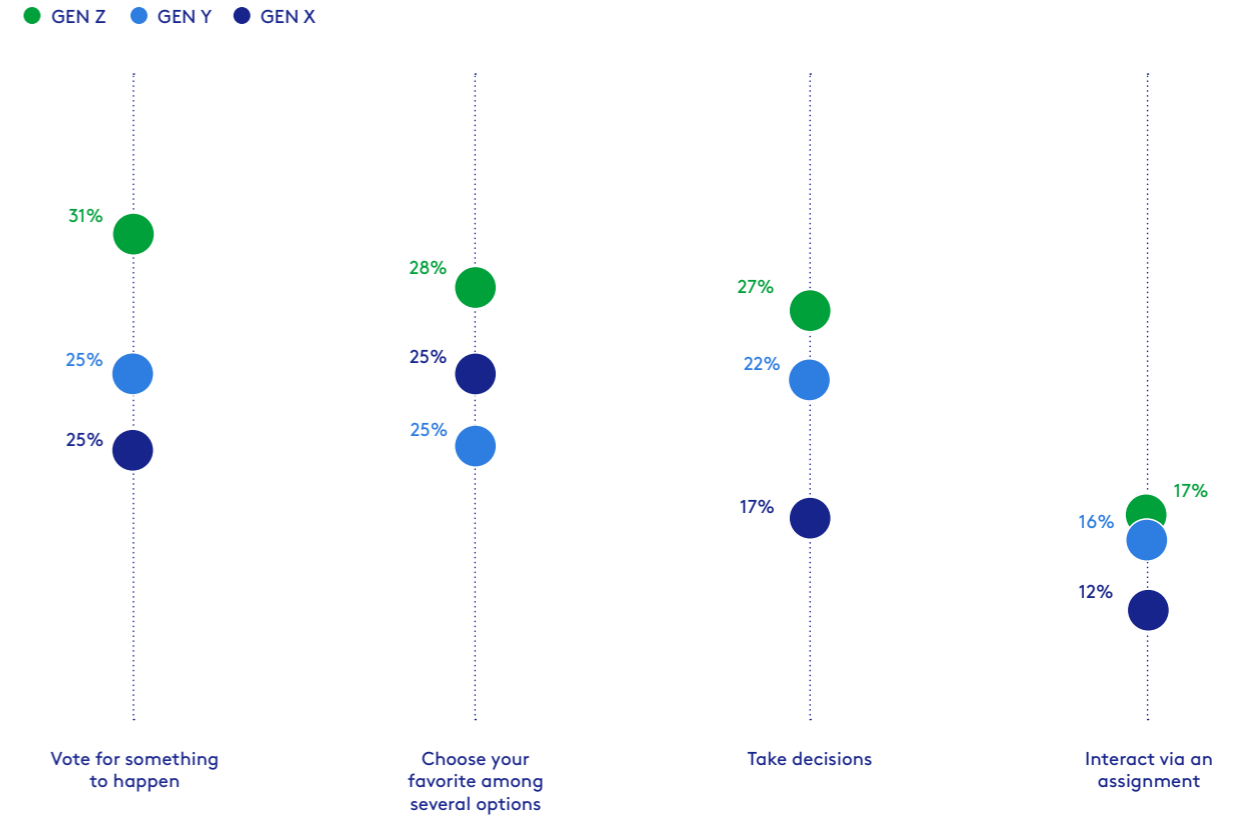
Gen Z's tendency to skip ads early is more about engagement than interest. In other words, if people take the time to look at an ad, they tend to respond similarly. Aggregate ad testing results across all ads within this research show very small differences. Gen Z responses are just slightly lower on enjoyment, branding, difference and meeting needs.

So how should brands engage Gen Z? Buying more non-skippable content and removing their control is not a recommended option. It's likely to result in a backlash, both to the individual advertiser and ultimately to the entire industry when this frustration results in more people installing ad-blocking software. Given this, the only real way forward is for brands to create content that will stop Gen Z in their tracks.

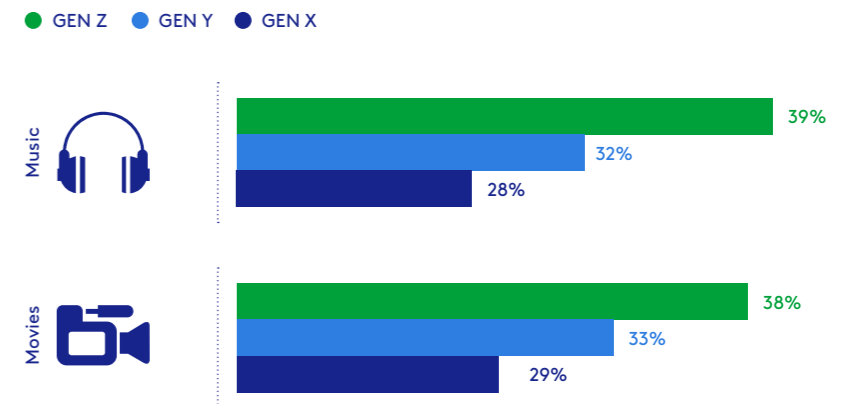
POSITIVITY TOWARDS ADS YOU CAN...



POSITIVITY TOWARDS ADS YOU CAN...

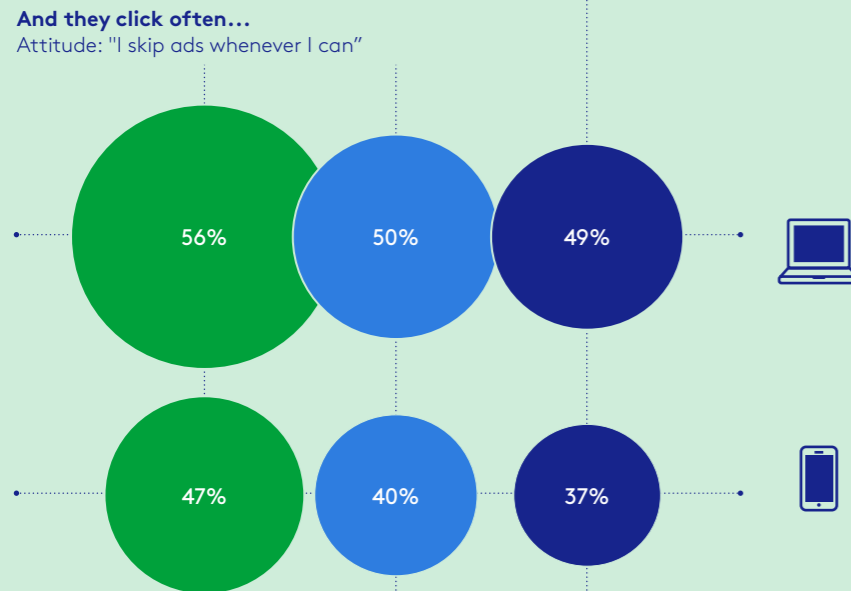
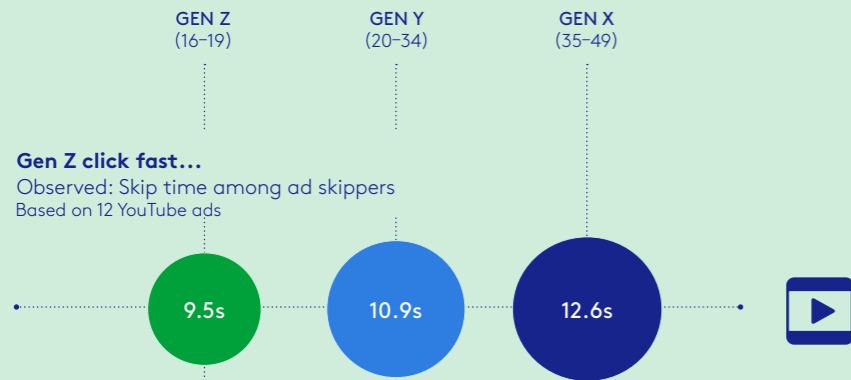


GEN Z PREFER ADS IN MUSIC AND MOVIE CONTEXTS

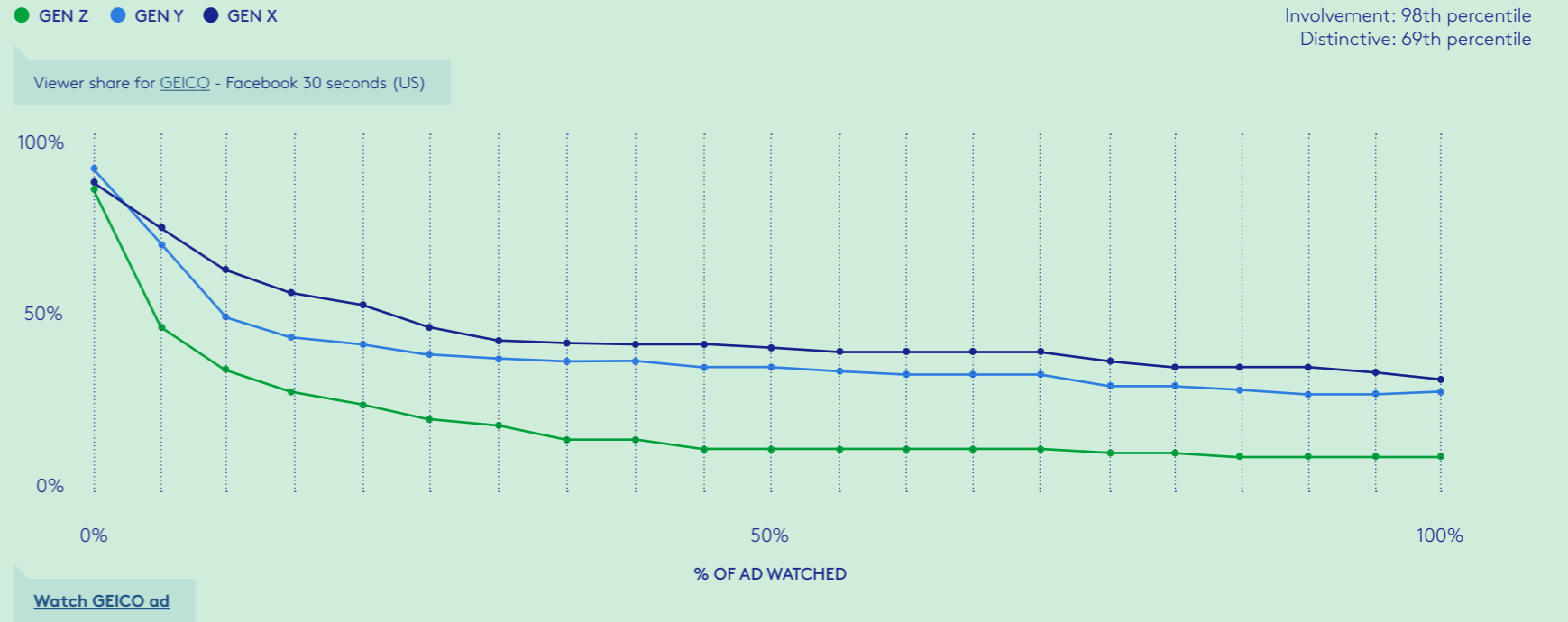


ENGAGING GEN Z IS DIFFICULT

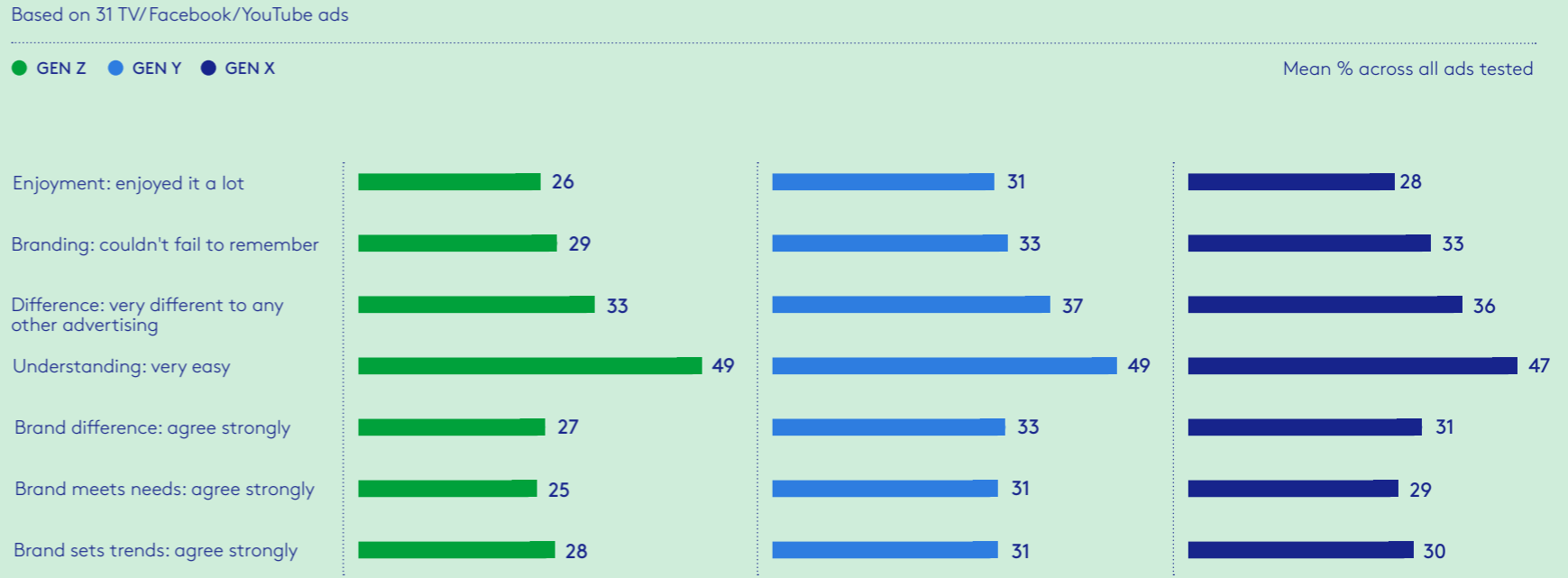
IT'S TOUGH TO GET GEN Z TO ENGAGE



EVEN VERY DISTINCTIVE AND INVOLVING ADS CAN ENGAGE GEN Z LESS



BUT THIS ISN'T BECAUSE GEN Z TAKE DIFFERENT THINGS AWAY FROM ADS. ONCE THEY HAVE SEEN AN AD, GEN X, Y AND Z RESPOND SIMILARLY



CREATIVE DEVELOPMENT: IMPROVING ENGAGEMENT

There are four main elements to engaging Gen Z successfully

While there is clearly no formula for creating great ads, the AdReaction research reveals some of the elements that people value most in meaningful and impactful advertising. For instance, a majority of AdReaction respondents want ads to make them laugh. This is common among all ages, but especially true of Gen Z. The primary features that are particularly important to Gen Z are:

- Music and humour: Gen Z are more likely than other generations to demand that the content they consume is matched by “good” music and humour they identify with.
- Design: Gen Z appreciate great design more than older generations, whether it’s contained within display or video advertising formats.
- Celebrity: the presence of famous people in ads is less of a priority overall, but is more important to Gen Z than older generations. Gen Z are more likely to enjoy ads featuring both mainstream and internet celebrities – bloggers and vloggers who have achieved fame on social media channels.

GEN Z PARTICULARLY VALUE HUMOUR, MUSIC, DESIGN AND CELEBRITIES IN ADVERTISING

● GEN Z ● GEN Y ● GEN X



Humour in advertising is the primary way to prevent people, especially Gen Z, from avoiding ads and shifting their attention

Music

Kantar Millward Brown ad testing research has long shown that music, used well, can be a powerful enhancement for an ad. Although the use of music does not automatically guarantee benefits, the inspired use of the right music can affect every aspect of an ad's performance.

Gen Z can boast about having the greatest access to the greatest variety of music ever, so it's not surprising that this generation emphasise music as a defining characteristic of a good ad. However, there are cultural variations to the kind of music that has the optimum effect. To better understand these cultural nuances, in-depth learning from the qualitative Gen Z online discussions is revealing.

In China, we see that Gen Z want their music to be upbeat, playful and fun. If they consider the music to be annoying, they will close the ad or divert their attention.

In Germany, Gen Z are far more aware of how different kinds of music

can influence the mood and style of ads. Interestingly, Gen Z in Germany also find that ads accompanied by music are far easier to consume and recall because there is no voiceover interrupting the flow of images. They claim the message is clearer with music.



China, Harbin Beer

哈尔滨啤酒的广告, 因为我觉得它的广告比较创新, 它用了音乐的rap和哈尔滨啤酒完美的融合在一起, 用rap带动整个广告, 感觉整个产品和我们年轻人的生活连接在一起, 使产品年轻化了, 让人感觉比较有创意。

"I like the Harbin Beer ad because I think it is creative. The rap music fits well with the ad and brings out the feeling. It makes me feel like the product connects with young people like us. I can feel its creativity, and it rejuvenates the brand"



USA, Coca-Cola

This 360° video ad is described by Gen Z audiences as “innovative” and “engaging”



Germany, Pandora

“The editing, filming and colours are beautiful. Very aesthetically pleasing. I have never seen something like this before and I love looking at it”

Design

Gen Z have a sophisticated level of visual discernment. Advertising isn't simply important for what it says but for how it is presented – particularly in terms of visual qualities.

Gen Z tend to find TV commercials and cinema ads to be of the highest visual quality. But they also appreciate when digital ads have a strong visual aesthetic and when brands use new immersive formats to enhance the visual experience such as virtual and augmented reality.

Germany, Esprit

“Ads with a nice design help make understanding the ad easier. This ad with the clear background does not distract in any way and the clothes are the focus”



Humour

The AdReaction Gen X, Y and Z study confirms research from the previous AdReaction Video study, which showed that humour in advertising is the primary way to prevent people, especially Gen Z, from avoiding ads and shifting their attention to something else. Certainly, different kinds of humour appeal in different cultures so it's important for marketers to be sympathetic to cultural nuances when developing creative.

Nevertheless, some material has been universally successful. Interesting comedic plots can capture and hold the attention of Gen Z audiences. One consumer in China cited a funny McDonald's ad that featured characters from the *Despicable Me* movie. This campaign also ran in other markets including the US and India. Gen Z also seem to like wacky ads like the fruit2go campaign in Germany.

Celebrity

Although celebrity doesn't have a strong overall influence on receptivity, the right celebrity, used in the right way, can undoubtedly be a powerful brand asset. But Kantar Millward Brown ad testing research has shown that using a celebrity does not guarantee effective advertising; overall, there's very little difference between the performance of ads with celebrities versus those without. Whether a celebrity is right for a brand depends on whether they are known and liked, and what they stand for among the target audience. This assessment becomes particularly important for brands targeting Gen Z, given they are more likely than older people to appreciate ads with celebrities.

Celebrities that resonate most strongly differ according to global cultures. In China, for instance, though all kinds of celebrities are used in



Germany, fruit2go

"It's crazy and funny – you just have to look at it"

China, McDonald's

"[When ads are funny] they make me forget about skipping the ad"



ads, our Gen Z research participants expressed a preference for those who promote a strong personality and character. In Germany, the preference is for celebrities who are described as aspirational, glamorous and, crucially, authentic. In the US, the type of celebrities that interest Gen Z varies. But Gen Z-ers are acutely sensitive to the difference between a paid endorsement (when celebrities don't use the product) and celebrities who actually use the product, which can often better be expressed in narratives and tutorials.



US



Germany



China

Here the type of celebrities that interest Gen Z varies. But Gen Z are acutely sensitive to the difference between paid endorsements (when celebrities don't use the product) and celebrities who actually use the product, which can often better be expressed in narratives and tutorials.

Celebrities described as aspirational and glamorous can increase the credibility of the ad ("those who have a nice life, expensive products and the latest phone, clothes, car or technology just embody brands"). However, it is most important that the celebrity is authentic: they need to fit the brand/product and convey credibly that they would use this brand ("Heidi Klum in the McDonald's ad looked just weird").

Featuring a celebrity in an ad is described as "almost a norm". Pop stars (particularly K-Pop and music reality contestants), athletes (national and international), bloggers and successful businesspeople or public figures appeal to Gen Z audiences. The personality and character of the celebrities featured is of particular importance.

COMPONENTS OF SUCCESS

A target generation is important to marketing strategy, but not the only consideration

Beyond the creative factors that Gen Z highlight as important, what truly matters is their reactions to finished ads. Ad testing results from the AdReaction Gen X, Y and Z study show that style and tone of voice are critical to success, and confirm that design and music can work particularly well. Importantly, the results also make it clear that brands will need to look beyond simple age-based targeting, and incorporate attitudinal understanding to build the most powerful connections across generations.

Style and tone

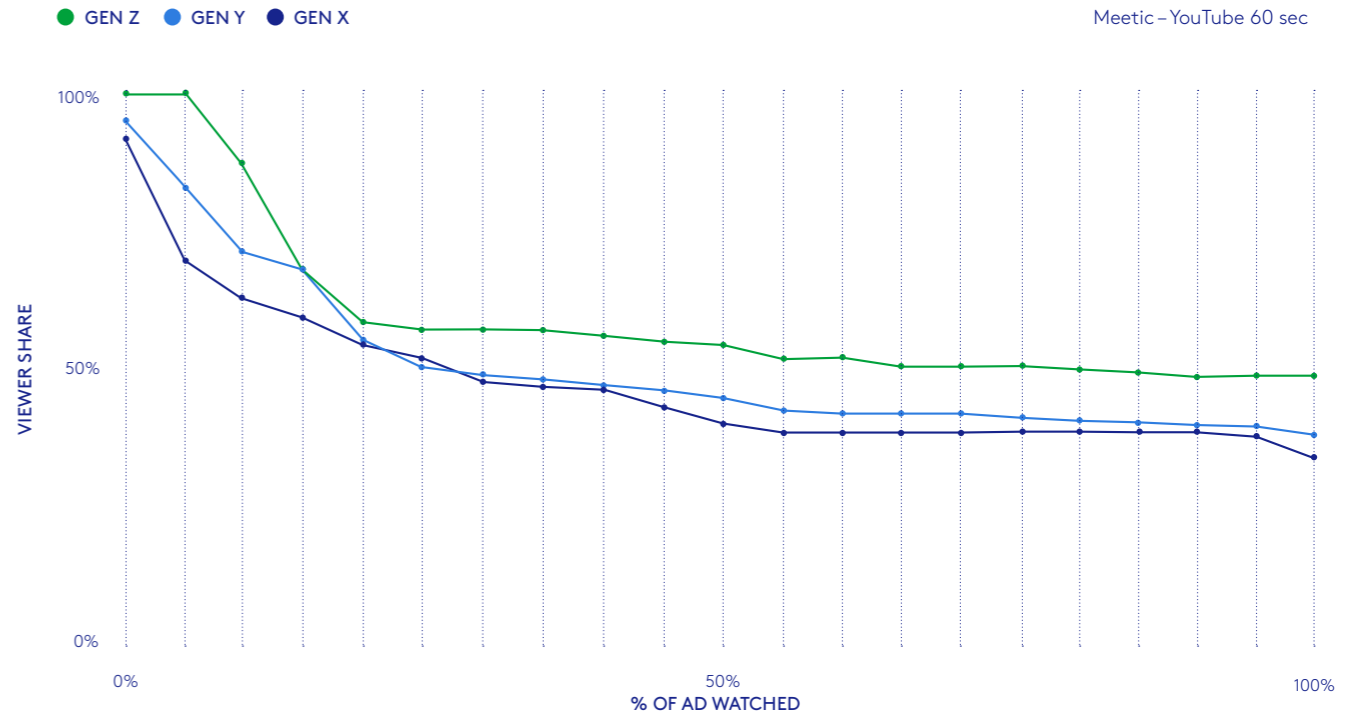
Among the few ads that engaged and appealed more strongly to Gen Z, style and tone of voice appear to be critical to their success. This was exemplified by an ad for online dating company Meetic in France, which shows a series of people learning to love their imperfections.

Of course, the dating category may be particularly appealing to Gen Z, but the characters featured in the ad were certainly not all in the Gen Z age group. It is clear from their responses that it is the way the story is told that generated the strong Gen Z engagement. One teenage girl said: "This ad is cool and fun. It shows that everyone is not perfect either physically or with his character. Everyone can find a boyfriend/girlfriend thanks to Meetic." A male teen remarked: "If you do not like your imperfections, someone will love them for you." This resulted in the rare event of more Gen Z viewers watching the ad to the end than Gens X or Y.

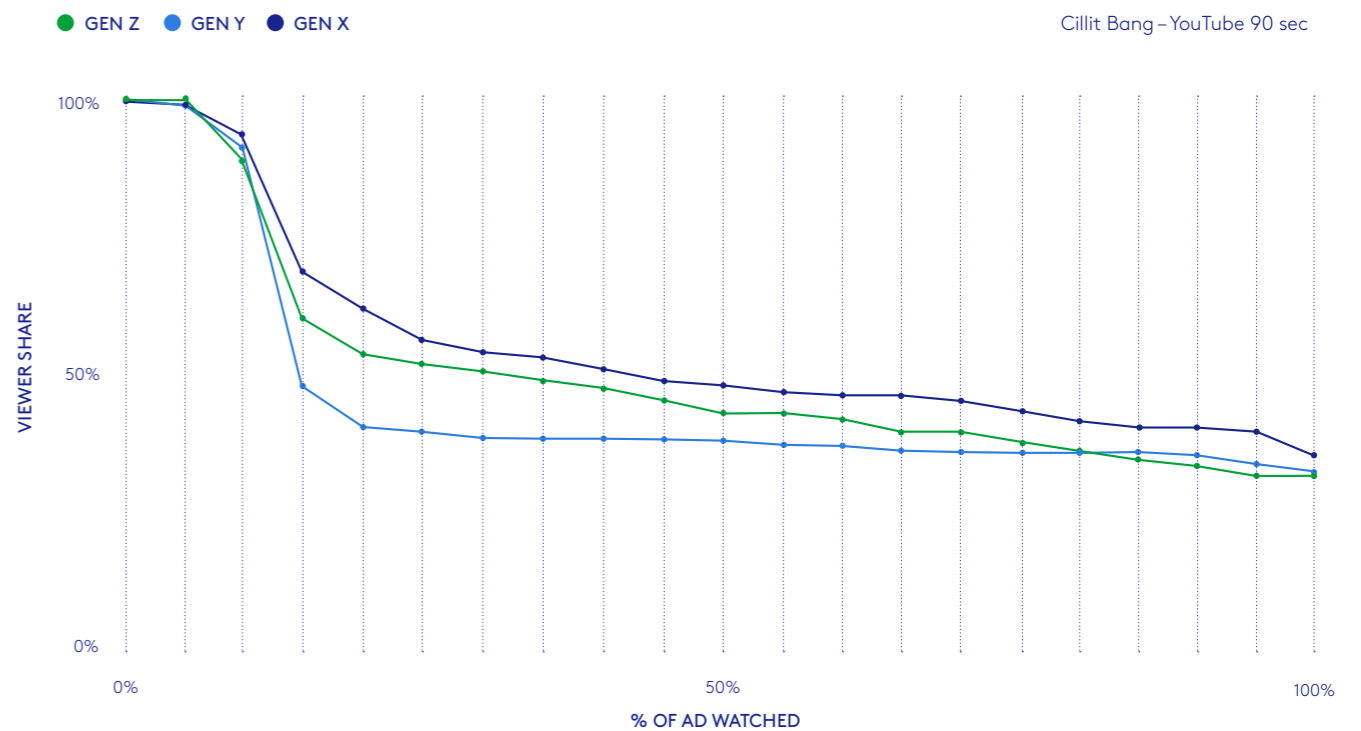


W attempting to appeal across generations is only one consideration for creative development

APPEALING TO GEN Z: CREATIVE STYLE AND TONE



APPEALING ACROSS GENERATIONS: SOME ADS PULL IT OFF



APPEALING TO GEN Z: AWESOME MUSIC AND GOOD DESIGN

● GEN Z ● GEN Y ● GEN X

Design and music

Ad testing from the AdReaction study also validates that great design and music have a particularly positive influence on Gen Z.

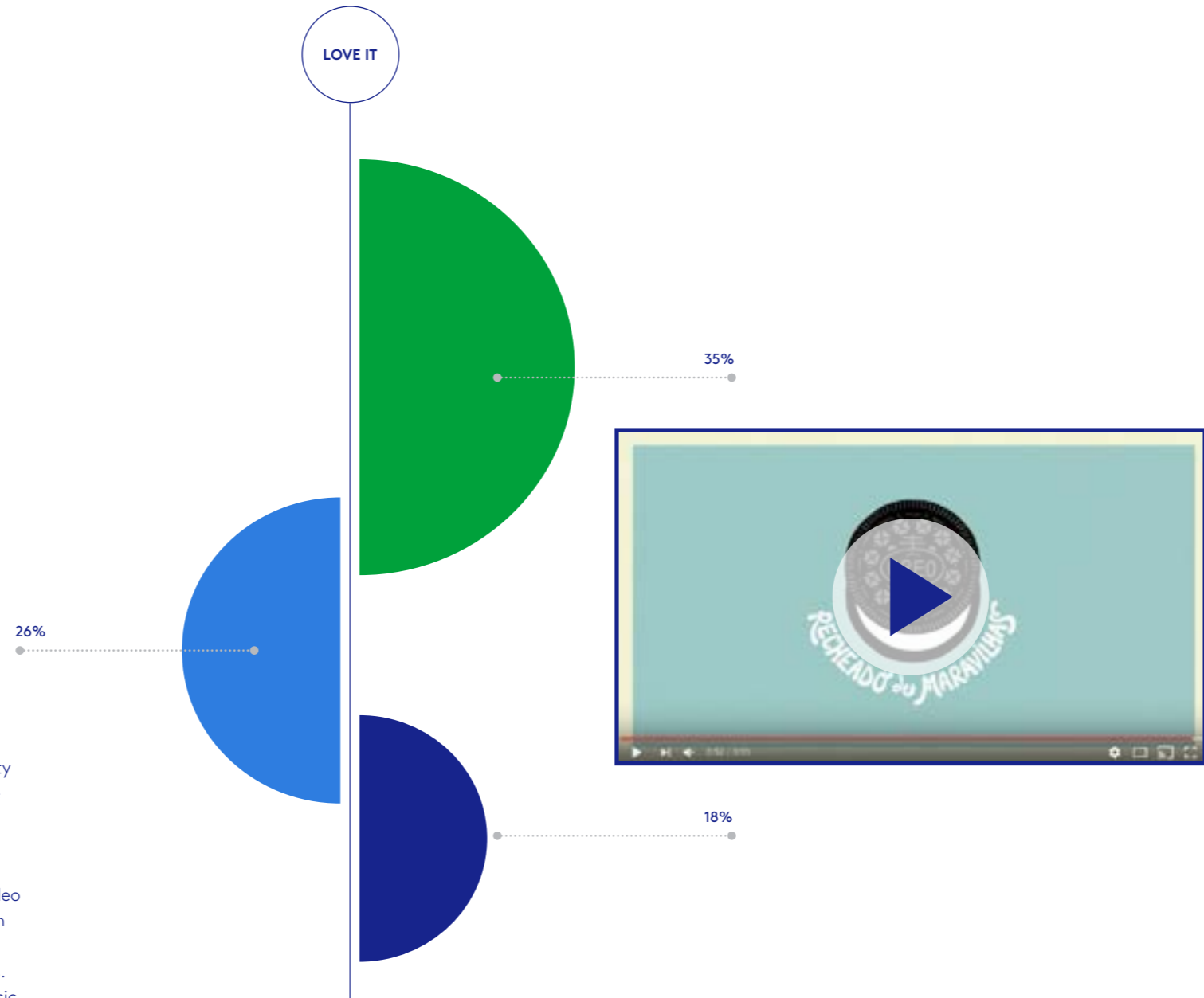
The “Wonderfilled” Oreo ad, which was tested in Brazil, is a perfect example of how using catchy, memorable music and taking a unique creative approach can generate a truly effective piece of Gen Z-friendly content. The cartoon-like ad wonders whether by giving archetypal baddies like the Big Bad Wolf, Dracula and sharks an Oreo cookie, their stories would change. Just a little bit of cream can make you happier – all accompanied by an insanely catchy Sesame Street-style tune.

The Oreo ad certainly didn’t alienate other generations, since its overall scores on enjoyment, distinctiveness and branding are in the top 10 percent of all ads tested. However, it generated the most passionately positive response among Gen Z viewers: 35 percent of 16–19 year olds “loved it” compared to 18 percent of 35–45 year olds.

One video that scores highly across the generations is an ad for Cillit Bang cleaning products (see previous page), which was tested in France. The slogan at the end of this ad says Cillit Bang “almost makes cleaning exciting”. The ad has a pulsating disco soundtrack,

W catchy, memorable music and a unique creative approach can create a truly effective piece of Gen Z-friendly content

brilliant choreography and a clever, witty story of a mechanic forced to complete the impossible job of cleaning an entire garage. He accomplishes the task – dancing around with effortless cool – all because of the Cillit Bang spray. The video scores in the top 10 percent of all ads on enjoyment, and retains strong viewer share to the end among all generations. So, in this case, the combination of music and design clearly works for Gen Z and other generations.



Brazil

The Oreo ad scored in the top 10% of ads tested, not just on enjoyment but distinctiveness and branding.

AGE IS JUST ONE PART OF THE EQUATION: ATTITUDES PLAY A ROLE

Engagement is highest among those who are open minded about LGBT issues

Attitudes

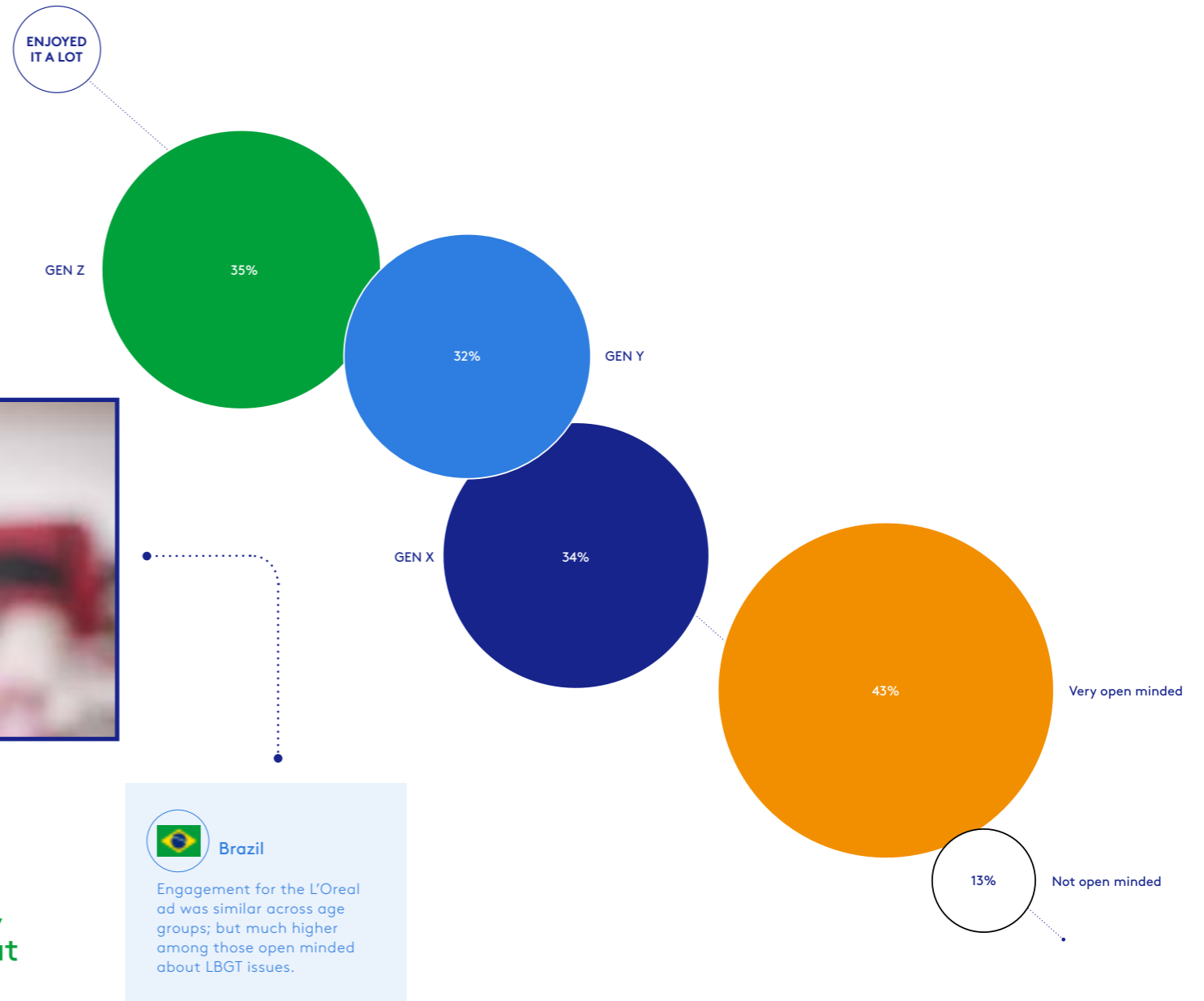
Finally, it is important to note that attempting to appeal across generations is only one consideration for creative development. In the same way that no individual can be defined by their age, no ad can be judged on how well it extends its appeal across generations. For many brands, the key will not just be age, but the shared attitudes and values needed to connect with people of all ages.

A powerful L'Oréal ad, tested in Brazil, is another good example of reaching an audience across generations. The ad tells the story of Valentina, a transgender woman preparing for her first Woman's Day. It finishes with the L'Oréal Paris claim that every woman is worth it. The ad scores quite well overall, and enjoyment is consistent across age groups. However, enjoyment is much higher among people who are open minded about lesbian, gay, bisexual and transgender issues. We see this importance of attitudes across all kinds of ads, but especially so among ads that tackle issues like discrimination and gender equality, or that break cultural taboos.

Targeting different age groups is not always the best move for brands and their creative teams. If a story is strong enough and emotionally engaging, cross-generational appeal can be achieved. AdReaction ad testing suggests this is difficult, but not impossible.



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CONCLUSION

The AdReaction study provides a snapshot of a point in time. Some of the differences we have observed – like negativity to non-skippable online content – may last a lifetime, while others – like Gen Z’s ambition or a passion for selfies – may simply be a phase. Some differences may diminish over time, both as Gen Z grow up and moderate their views, and as Gens Y and X adopt more of the behaviours of younger consumers, who are now leading the charge.

This is not a generational study in the purest form. We have not followed our subjects over time to see how their attitudes and behaviours have changed. We have also just scratched the surface of the emerging Gen Z audience; there are many more of them on their way. The entire Gen Z group born between 1997 and 2011 is estimated to number two billion globally – approximately 27 per cent of the world’s population.

We hope to have revealed some compelling ways for marketers to capture the attention of this mobile-first generation. We have exposed how Gen Z like to interact with technology and media, and how they respond to different advertising strategies.

Some conclusions may seem counterintuitive – for instance, don’t underestimate the power of traditional media to reach Gen Z. Even though Gen

Z spend more time online than on TV, they are still more open to TV ads than digital ads. And outdoor ads are also still powerful tools to gain their attention.

Brands do need to stop using invasive, non-skippable online video formats – all generations dislike these, but especially Gen Z. Marketers also need to experiment with more innovative online formats like mobile rewards, video and sponsored lenses. And it’s important to remember that Gen Z prefer their content to be short, mobile and interactive.

When developing video, ensure ads deliver early impact and intrigue to avoid being skipped, and identify the shared attitudes and values you want to use to connect with people of all ages – planning these things is crucial to maximising impact.

Gen Z are not the unknowable group that some seem to think. They are different, that’s for sure, and as such demand a different marketing mindset. The AdReaction Gen X, Y and Z report shows that by adhering to the core rules we have outlined here, Gen Z can be reached and engaged to become powerful brand advocates.



brands clearly need to stop using invasive, non-skippable online video formats – all generations hate these

A group of young people, including three women and one man, are gathered around a tablet computer. They are all looking at the screen with interest and some are smiling. The image is overlaid with a blue tint on the left side and an orange tint on the right side, creating a modern, digital atmosphere. The background is blurred, suggesting an indoor setting like a cafe or office.

KANTAR MILLWARD BROWN

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