

Fearful or Fearless?

WHEN IT COMES TO INCLUSIVE REPRESENTATION,
ONLY ONE APPROACH MATTERS TO GEN Z



culturecore^{GOLIN} | **PULSE**

Research by YPulse for Golin | Summer 2021

About This Paper

Diversity and inclusion can feel like a tricky topic for brands to navigate. Our research seeks to understand how younger generations express identity and the best approaches for brands to consider when inclusivity is a core value.

We hope that this analysis clarifies the nuances of identity and gives straightforward, actionable ways to advance inclusive representation.



What Will Be Covered

- 1 Gen Z is changing what identity means.
- 2 Mainstream brands have an outdated approach to diversity.
- 3 Gen Z speaks up to help brands, not cancel them.

Methodology

YPulse and **Golin** partnered to conduct a nationwide online quantitative survey to uncover the thoughts and attitudes of Gen Z. The study was fielded 3/11 - 3/24/2021 among 2,151 16 to 25-year-olds. It included an oversample of Black, Asian, and Hispanic respondents. Results were weighted to be nationally representative for race, ethnicity, gender, age, and region.

About YPulse

YPulse is the leading authority on Millennials and Gen Z. We provide strategic insight to the world's leading brands via our subscription-based syndicated research content as well as our custom research and consulting services. Staffed with a cross-functional team of researchers, marketers, writers, and technologists, we give our clients a 360-degree view of what it's like to be a Millennial or Gen Z in America today.

About Golin

Culturecore is a youth culture consultancy within Golin. We bring clarity to the values, behaviors, and motivations of young people. We help companies build brand love and drive business growth by understanding and engaging with Gen Z.

OBSERVATION 1:

Gen Z is Changing What Identity Means

For them, representation means **more than racial identity.**

Over half of Gen Z (those born after 1995) identify as being Black, Indigenous, or a Person of Color (BIPOC) making them the most racially diverse generation to date (according to the U.S. Census Bureau). Their embrace of multiple cultures is changing how we think about identity.

This increased diversity means that Gen Z notices when brands and media fall flat on representation.

When they think about underrepresented groups, things like gender identity, sexual orientation, geography, socio-economic status, family type, body type, educational level, and political orientation come to mind too. Because their idea of representation is so broad, over half agree that they're part of an underrepresented group.

PARTS OF THEIR IDENTITY THEY FEEL ARE UNDERREPRESENTED

Underrepresented Gen Z

Racial Group

Black / African American, Asian, White, Native American, Foreign-born, 2nd generation, Hispanic, Multiracial

64%

Class / Socioeconomic Status

Part of a divorced / blended family, Lower income, Blue-collar career, Do not have a college education

47%

Sexual Orientation

LGBTQ+, Have LGBTQ+ parents

34%

Ideological Group

Conservative, Liberal, Christian, Muslim, Jewish, Atheist / agnostic, Other religious belief, Restricted diet

33%

Body Type / Ability

Larger bodied, Smaller bodied, Person with a disability / difference

31%

Geographic Location

From the Midwest, From the South, From the West Coast, From the East Coast

24%

"We are allies for the people and concepts that require more attention and deserve more fairness. We are allies for diversity, representation, and inclusion.

BIPOC Female, 25, Hawaii



TAKE ACTION

Gen Z understands that their identities are multifaceted. Brands need to **broaden their definition of inclusion** to cover this expansive network of identities.

OBSERVATION 2:

Mainstream Brands Have an Outdated Approach to Diversity

For Gen Z, representation is **more than just words and images** in slick ad campaigns.

Despite increased awareness about representation, brands are not living up to young people's hopes. 61% agree "even after the Black LivesMatter movement, brands still have work to do representing racial diversity" and 56% agree "even after the #MeToo movement, brands still have work to do representing gender diversity."

Representation isn't just for the marginalized - most of Gen Z wants and expects representation from brands regardless of whether they feel represented themselves.

53% agree "brands just showing different skin tones in ads misses the point of diversity." When forced to choose between products for a diverse range or a diverse range of people in ads, 62% of Gen Z say that good representation is "when brands have products for a diverse range of people." But both are still important!

WHEN A BRAND IS COMMITTED TO REPRESENTATION, GEN Z EXPECT TO SEE:

Pay Equity



47%

Products and Services for a Wide Range of People



46%

Diversity Initiatives



45%

Diverse Representation on Social Media



44%

Diverse Representation in Mainstream Media



43%

Diverse Leadership



42%



"I believe we've come a long way towards making this world diverse and inclusive, but we aren't close to finishing."

BIPOC Male, 24,
Pennsylvania

TAKE ACTION

Better representation is more than just using the right words and showing the right people on Instagram — Gen Z want that and **inclusive products and business practices.**

OBSERVATION 3:

Gen Z Speaks Up to Help Rather Than Cancel Brands

They'd rather help brands reach their potential by **offering advice and helping them grow** as opposed to punishing them.

Young consumers are holding brands accountable for their actions. When brands get representation right, this is a generation that is eager to show their support both online and IRL. About 75% of Gen Z will seek out and recommend a brand that does a good job at representation. But if a misstep happens, they're not afraid to tell brands they messed up (within reason). Three-quarters would also take an active step in responding to any missteps or controversies.

As much news as there is about Gen Z "cancelling" brands, this is generally the last action they'll take. The top two actions Gen Z will take if a brand they usually like/support makes a misstep are: wait and see how the brand deals with the mishap before responding (44%) and watch the conversation about what went wrong unfold in the media (37%). Less than a quarter of Gen Z say the person responsible for the mistake needs to be fired.

WHEN BRANDS DO A GOOD JOB, GEN Z SAY THEY'RE MORE LIKELY THAN NOT TO:



When brands do a bad job, Gen Z say they're more likely than not to:

44%
Wait to see how the brand responds

28%
Offer the brand advice on how to do better

9%
Cancel the brand

TAKE ACTION

When a mistake is made, communication is key: **Explain, apologize, donate, then take steps to prevent it from happening again.** Gen Z don't want to cancel the brands they like.

Three Things to Remember

Representation is extremely important in helping brands stay relevant and much of it starts with how and what they communicate.

1

Get in touch with your brand's core values and then share them.

When Gen Z knows a brand supports their values, they're not only more likely to buy the brand but also to share the brand with their friends and family members. That means your brand has the potential to grab new Gen Z consumers just by putting your values out there.

2

Show them you're listening with your products and services.

Go beyond diversity in ad campaigns. Make your brand stand out and appeal to Gen Z by creating products and services that cater specifically to diverse audiences, and have a dialogue with them about it.

3

Branch out from mainstream media.

Traditional media spends and channels are not be the best way to reach Gen Z or tap into their values. Alternative platforms like TikTok are where Gen Z are considering and consuming content.



For more on how to build representation and engagement into your brand, send inquiries to culturecore@golin.com.

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The logo for YPULSE, featuring a stylized 'Y' composed of several parallel diagonal lines, followed by the word 'PULSE' in a bold, sans-serif font.

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