



2017 CONE GEN Z CSR STUDY: HOW TO SPEAK Z



## Move over Millennials, Here Comes

Gen Z has gotten a bad rap. Yes – their faces may be glued to their smartphones, but don't mistake that for disinterest. This is a group of early adopters, digital natives and energized advocates. Oh, and they'll account for 40 percent<sup>1</sup> of all consumers globally by 2020 – 2.56 billion people.<sup>2</sup> Their expectations of companies to address important social and environmental issues are high but how they want to get involved differs from other generations. And if you think they're "too young" to get engaged, think again. Say 🙌 to Gen Z.

<sup>1</sup> Fast Company, What Is Generation Z, And What Does It Want?, 2015

<sup>2</sup> Fung Global Retail Technology Report, Gen Z Report, 2016



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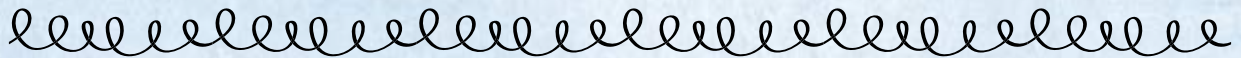
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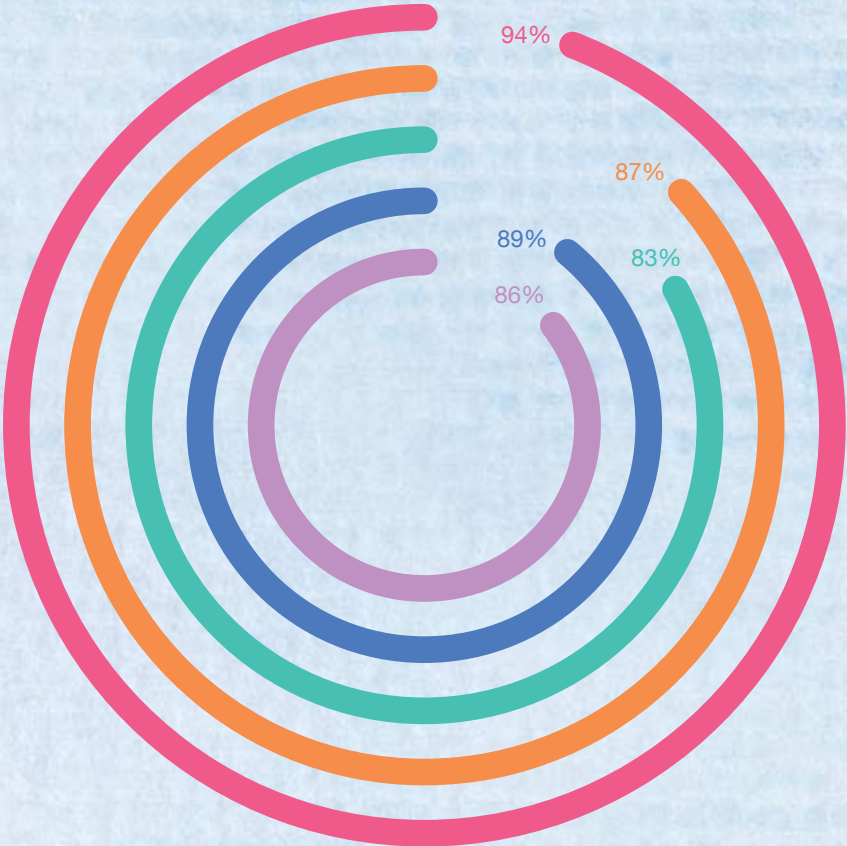


## **Gen Z + Companies = Change**

Let's start with the basics. As a generation brought up with recycling programs, climate change curriculum and diversity education, it's no surprise this is a highly empathetic – and socially conscious – group. Ninety-two percent say they care about social and environmental issues, but they don't exactly like what they see. Nearly nine-in-10 (89%) say they're worried about the health of our planet. To solve for this, they see companies as critical partners. In fact, this generation is the most likely to believe companies should help address urgent issues (94%) – even more so than their older Millennial cohorts or the average American.



# Gen Z Believes Companies Should Address Social and Environmental Issues



Gen Z



Millennials



Gen X



Baby Boomers



General Population



## Buy Good, Do Good



If you think Gen Z isn't already impacting companies' bottom lines, think again. Research shows this generation has access to \$44 billion in buying power – and has significant influence (93%) on family buying decisions.<sup>3</sup> And they're using their power for good. Nearly nine-in-10 (89%) say they would rather buy from a company addressing social or environmental issues over one that is not, and 92 percent would switch brands to one associated with a good cause, given similar price and quality, skewing just slightly higher than the national average (89%).

Despite their commitment to purchase brands with a higher purpose, don't expect them to seek out your product or service. Just shy of two-thirds (65%) say they pay attention to a company's CSR efforts when deciding what to buy. This lack of effort is no surprise considering the average attention span of a Gen Zer is eight seconds.<sup>4</sup> Yes – you read that right – eight seconds before they're on to the next piece of content. So how do you grab their attention and deliver an impactful message? Keep reading...

<sup>3</sup> IBM Institute for Business Value and National Retail Federation, Uniquely Generation Z, 2017

<sup>4</sup> BD Network, White Noise Generation ?!, 2016



**YIKES**

### Missing the Message

Younger Gen Zers are even less likely to pay attention to a company's CSR efforts when shopping (58% vs. 65% average).





## Friend, Not Foe

Like their older cohorts, Gen Z sees their wallets as the primary way to get engaged in CSR efforts, with nine-in-10 (90%) saying they would buy a product with a social or environmental benefit (vs. 91% Millennials, 87% general population). Yet, this generation is also likely to take a number of different actions, from volunteering (87%), to making a donation (85%) or signing a petition to help an important cause (84%). However, Gen Z is less apt to take a controversial or antagonistic approach to advocacy. This group is less likely to boycott a company (76% vs. 90% Millennials, 88% general population) or protest to help a cause (58%). Although highly engaged, Gen Z is more likely to participate in more traditional, positive ways while not necessarily putting negative pressure on companies. This could be good news for companies as this generation is more likely to be an advocate than an adversary.



## Activist in the Middle

Gen Zers ages 16-17 are slightly more likely to take confrontational actions like signing petitions (87% vs. 84%), protesting (62% vs. 58%) and boycotting (79% vs. 76%) when compared to the Gen Z average.



## How Gen Zers Want to Get Involved

*Very Likely/Somewhat Likely Net*

	Gen Z	Millennials	General Population
Buy a product with a social or environmental benefit	90%	91%	87%
Volunteer for a cause I care about	87%	81%	74%
Donate to a cause I care about	85%	87%	82%
Sign petitions to help causes I care about	84%	79%	73%
Share social or environmental information with my social networks	77%	76%	60%
Boycott/refuse to buy from a company that is doing harm	76%	90%	88%
Protest to help causes I care about	58%	—	—





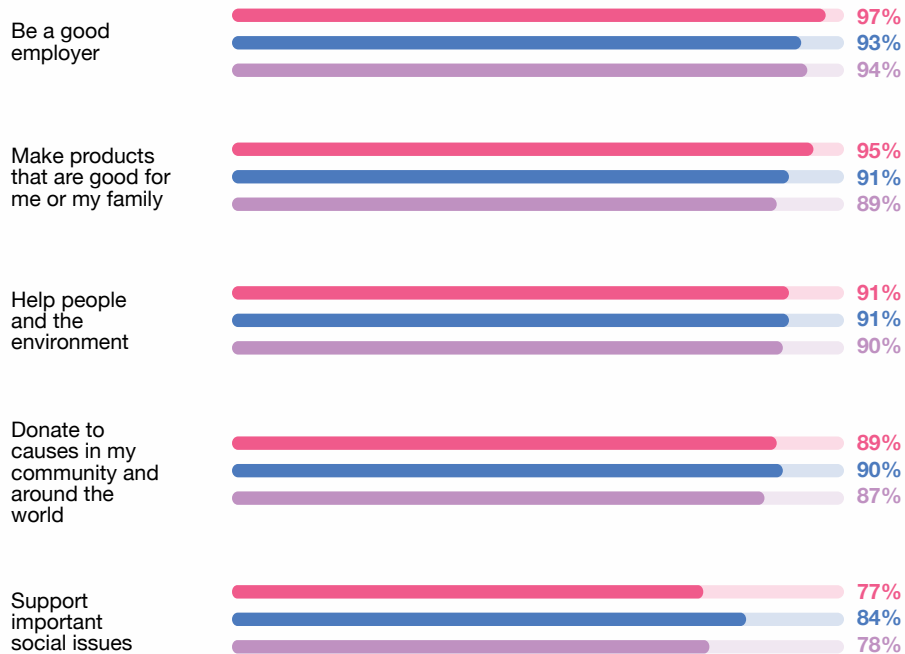
## Wise **BEYOND** Their Years

Despite their age, Gen Zers have a mature perspective on what it means to be a responsible company. This generation believes responsibility is primarily about being a good employer (97%), while also making products that are good for individuals and their families (95%). This group also wants companies to help people and the environment (91%), while donating to causes in their communities (89%). Gen Z feels strongly that all these things are important components of CSR, but when asked to choose, they are prioritizing the issue that will have the most personal impact – being a good employer (37%).



# Gen Zers Prioritize the Same Aspects of CSR as the General Population

Very Important/Somewhat Important Net



Gen Z



Millennials



General Population



## Caring for People and Planet

Gen Z wants companies to prioritize issue that hit close to home. Although the majority of Americans want companies to prioritize economic development (34%), Gen Z sees poverty and hunger (28%) as the most pressing issue, followed by environment (20%) and human rights (17%). This divergence from the national average may be due to the fact that poverty and hunger have more personal relevance – nearly one-in-six children live in households that struggle to put food on the table.<sup>5</sup> Yet, as this group matures, the issues they support continue to evolve. College-age Gen Zers view human rights (23%) as the most important issue, followed by environment (22%) and poverty and hunger (20%).



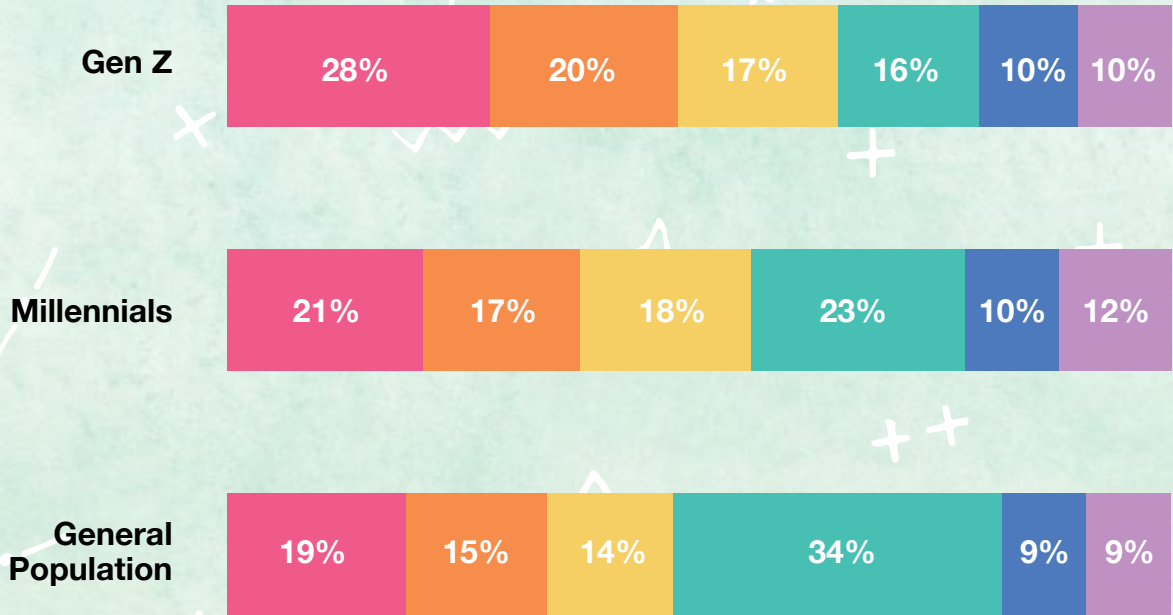
## Mainstreaming Malala


**Females ages 18-19 are the only group to prioritize human rights (25% vs. 17% average) over poverty and hunger (21% vs. 28%).**

<sup>5</sup> No Kid Hungry, 2017



# The One Issue Gen Z Would Like Companies to Address



-  Poverty and Hunger
-  Economic Development
-  Environment
-  Health and Disease
-  Human Rights
-  Education

## Socializing Social Justice



Beyond traditional areas for company involvement, Gen Z sees companies as instrumental in driving change among the hot-button topics in the news (and newsfeeds) today. For Gen Z, both job creation (96%) and reducing the high cost of college (92%) were most top of mind. This generation was in its formative years during the Great Recession and 73 percent say they were personally affected by it.<sup>6</sup> Now, as Gen Zers are on the brink of entering the workforce or pursuing a degree, they look to companies as partners in helping them obtain the tools they need to personally succeed. But it's not just about their job prospects, Gen Z also wants companies to address racial equality (88%), women's rights (86%), immigration and climate change (both at 81%). LGBTQ rights (65%) fell to the bottom of the list, perhaps because this younger generation was raised to be more inclusive of diverse sexuality and gender identity, unlike older generations.

These issues are so near and dear to this generation that two-thirds (67%) stand ready to stop purchasing from a company that shared a different perspective. Although this represents a majority, it is in juxtaposition to the nearly eight-in-10 (78%) Millennials who will boycott based on values. This distinction once again signals that Gen Z is slightly less confrontational than its older peers.



### Gender Defenders

**Gen Z females are much more likely to believe companies should support gender-based issues like LGBTQ (71% vs. 65% average, 58% male) and women's rights (91% vs. 86% average, 80% male).**

<sup>6</sup> Sparks & Honey, Meet Gen Z, 2014



## Gen Z Wants Companies to Address the Following Issues Active in the News

*Very Important/Somewhat Important Net*

	Gen Z	Millennials	General Population
Create more jobs in the United States	96%	93%	94%
Reduce high cost of college	92%	88%	81%
Racial equality	88%	89%	87%
Women's rights	86%	85%	84%
Immigration	81%	79%	78%
Climate change	81%	84%	76%
Gun control	68%	70%	65%
LGBTQ rights (i.e., lesbian, gay, bisexual, transgender and queer rights)	65%	74%	64%

## Making a Difference, One Post at a Time

As the original mobile-first generation, this group is connected 24/7. In fact, nearly half of Gen Z reports spending 10 hours a day connected online,<sup>7</sup> and almost 80 percent report feeling distressed when they are away from their personal electronic devices.<sup>8</sup> This group talks about everything on social media – from where they are and who they're with to what they ate – so it comes as no surprise that more than eight-in-10 (82%) use social media to talk about issues they care about. But it's not just about making small talk; Gen Z wants to use their voice as a positive force for change. Eighty-one percent believe they can make an impact on social and environmental issues through social media, and more than half (58%) believes supporting issues online is more effective at making a difference than doing something out in their community.

This perceived efficacy may be due to their witnessing the unprecedented virality of social content. In fact, the top reason Gen Z shares information is because they believe it can motivate other people to care as well (38%). This feeling of personal empowerment extends to the types of content they want to see and share. This generation reports that content showing them how their actions can make a difference (36%) will be most likely to grab their attention, even beyond a message that draws out an emotion (23%). Companies need to not only empower Gen Z to do good, but also to amplify their messages for an even greater impact.

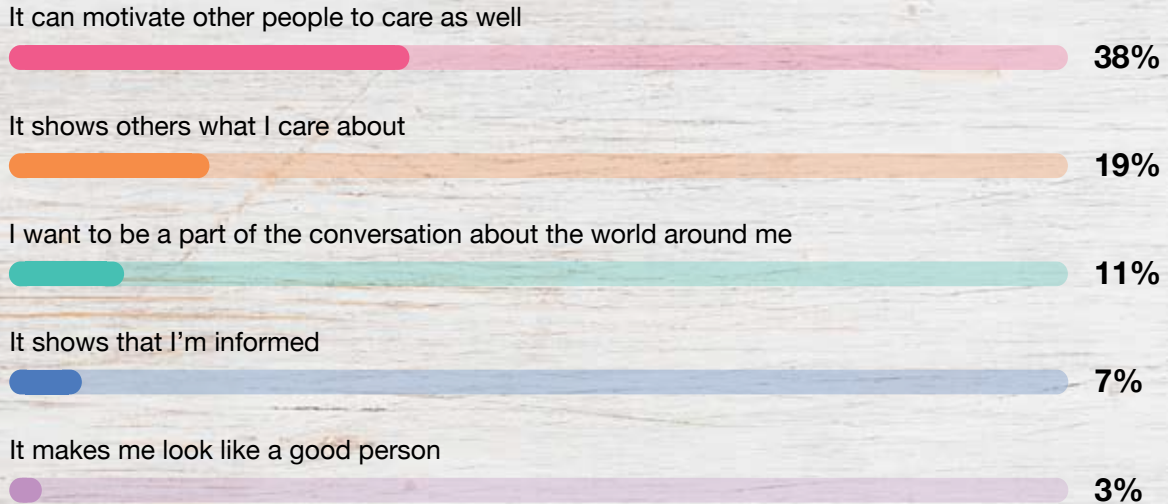


<sup>7</sup> Goldman Sachs, Emerging Theme Radar, 2015

<sup>8</sup> Mediakix, The 11 Generation Z Statistics Advertisers Must Know, 2017



## Motivations to Share Social and Environmental Information on Social Networks



### To Share or Not to Share

Mid-age Gen Z males (16-17) are less likely to use social to advocate for issues. Nearly three-in-10 (29%) say they don't post information about social or environmental issues on their social channels (vs. 23% Gen Z average).



## The Generation

Gen Z is turning to their smart devices to have a positive and empowering experience. Top actions include sharing their praise about a company that is doing good (87%), learning about what they can do to make a difference (86%), voting to give a charity a donation (86%) or watching a video about a social or environmental issue (83%). In alignment with offline actions, this group is less likely to take more hands-on or contentious actions against companies, such as speaking out against a company (68%) or researching if a company is helping or hurting society or the environment (69%) – especially when compared with the activist Millennial (75% and 77%, respectively).

### Top Online Actions to Support Social or Environmental Issues

*Very Important/Somewhat Important Net*

	Gen Z	Millennials	General Population
Share my positive opinion about a company that is doing good	87%	83%	77%
Vote to pick which charity should receive a donation	86%	82%	77%
Learn about what I can do to make a difference for the environment and my community	86%	84%	79%
Watch a video about a social or environmental issue	83%	81%	71%
“Like” or follow a charity or company’s social or environmental program	79%	77%	65%
Give feedback directly to companies about their social and environmental efforts	70%	74%	67%
Research if a company is helping or hurting society and the environment	69%	77%	65%
Speak out against companies that are harming society or the environment	68%	75%	67%
Take an online action to trigger a donation	68%	71%	53%



## Preferred Types of Online Content for Gen Z



Videos



Pictures



Written Articles  
or Stories



Infographics  
or Data



Quizzes  
or Games

Although they eagerly test new social media platforms, when it comes to sharing and participating in social and environmental issues, Facebook reigns (66%). Gen Z is also likely to use a number of other platforms to advocate for topics that are important to them – from Instagram (51%) to YouTube (50%) and Snapchat (43%). Here, gender plays a part in the most popular channels. Females are more likely to use Instagram (58% vs. 44% male) and Snapchat (49% vs. 36% male), while males prefer YouTube (53% vs. 47% female) to learn and engage with issues-based content.

To reach Gen Z through online content, the key is to make it as visual and engaging as possible. This generation is far and away more likely to want to see videos (68% vs. 44% general population\*), pictures (56% vs. 42% general population\*) or stories (49% vs. 48% general population\*). However, long-form articles and data-heavy content increases in effectiveness as they mature. College-age students are more likely to want to see written articles (59% vs. 37% middle schoolers) or infographics (40% vs. 20% middle schoolers).



### I Stream, You Stream...

Want to reach younger Gen Z males? Video, video, video. This group is the most likely group to want to see streaming content (73% vs. 68% average).

\* General population data from 2014 Cone Communications Digital Activism Study



## Social Media > News

When it comes to who influences this young generation, they are most likely to turn to those closest to them for trusted information. Parents (54%), followed by their close group of friends (44%) are most likely to sway Gen Zers' decisions to buy a product with a social or environmental benefit. In line with the growing importance of social media, this generation is just as likely to be influenced by people on social media (26%) as the news (26%). Not surprisingly, as Gen Z ages, their go-to sources for information significantly change. Those on the younger side of the generation (ages 13-15) are guided more by their parents (66%) and less likely to be inspired by companies (10%), but as they grow older (18-19), parents (38%) become less prominent and friends (46%) and companies (20%) grow in importance.



## Rejecting the Kardashian Effect

**Celebrities are least likely  
to influence Gen Z (16%).**





## Gen Z's Purchasing Decisions are Most Likely to be Influenced by

INFLUENCER	RANK	PERCENTAGE
Parents	1	54%
Close friends	2	44%
News	3	26%
People on social media	3	26%
Companies	5	17%
Celebrities	6	16%

[PROCEED TO CHECKOUT >](#)

### SUMMARY

COUPON CODE

ENTER SHIPPING ADDRESS

ENTER PAYMENT INFO



*girl  
gang*



## The Future **IS FEMALE**

Although Gen Z as a whole is highly inspired, engaged and digitally advanced, one group stood out as the clear leader in pushing for social and environmental change. More mature Gen Z females (ages 18-19) were above and beyond the ones leading the charge. In fact, this group is near unanimous in its belief that companies should help support issues (98% vs. 94% Gen Z average). Not only is she the most likely to buy from a company that is supporting social and environmental causes (94% vs. 89%), she's also more likely to pay attention to these messages while shopping (71% vs. 65%). And this expectation of companies extends beyond responsible business practices. Mature Gen Z females are also the most likely to want companies to support social justice issues (85% vs. 77%). However, with the good, comes the bad – she is more critical of companies and is more likely to boycott based on company values, especially in comparison to her male counterparts (70% vs. 60%).

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## The Takeaways



In true Gen Z fashion, we're going to make things short, simple and concise – 140 characters, or less. What do you need to know to engage this always-on but “content saturated” generation?





## Gen Z

@genz



### Tweets

### Tweets & replies

### Media



**Gen Z** @genz

@genz wants to purchase responsible products, but they're not always looking. Find creative ways to get your messages heard, and heard often.



**Gen Z** @genz

Being a good employer is just as important for recruitment as for differentiating your brand. Show @genz how you do right by your people.



**Gen Z** @genz

@genz wants to be your friend, not your foe. Get them engaged with positive messages that show how they can get involved and make an impact.



**Gen Z** @genz

To @genz, information from social networks is just as influential as the news. Don't forget the power of user-generated content.



**Gen Z** @genz

@genz sees social media as a way to amplify do-good messages. Give them the tools and they'll spread your CSR content.





## About the Research

Cone Communications sampled 1,000 Americans ages 13-19 to glean their attitudes, perceptions and behaviors around corporate social responsibility (CSR). The margin of error associated with a sample of this size is  $\pm 3\%$  of a 95% level of confidence. We broadly described CSR to respondents as “companies that are changing the way they operate and giving their support to help address the social and environmental issues the world faces today.”





## About Cone Communications

Cone Communications is a public relations and marketing agency that is Always Making a Difference<sup>SM</sup> for business, brands and society. With a unique combination of corporate social responsibility (CSR), consumer brand and integrated marketing expertise, our people deliver emotional storytelling and business value for every client.

Cone Communications' category-defining CSR work and our world-class research have drawn together some of the deepest thinkers in global sustainability issues, cause marketing and nonprofit communications. Our foundation as a public relations agency for consumer brands has attracted some of the most creative and ambitious integrated marketers in the industry.

Together, we tackle communication challenges as a shared responsibility – and we are unified by what we do best:

- We deliver emotional storytelling designed to break through and endure.
- We create brand value and return for philanthropic, social and environmental commitments of all sizes.
- We track trends and understand corporate behaviors expected in today's transparent world.

We understand that driving positive change starts with driving a healthy bottom line. If you need an agency uniquely positioned to do both, let's get started.

Select services include:

- Corporate Social Responsibility Strategy
- Sustainability Communications
- Strategic Philanthropy
- Cause Marketing
- Nonprofit Strategy
- Employee Engagement
- Crisis and Issues Management
- Public Relations
- Influence and Advocacy
- Digital and Social Strategy
- Content Creation and Amplification
- Creative
- Planning and Research
- CSR Reporting



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