

# 2021: Looking Back & Moving Forward

## A Look At The Trends And Behaviors Of Gen Z In The Past Year And What To Expect This Year

### Introduction

#### OUR RESEARCH METHODOLOGY

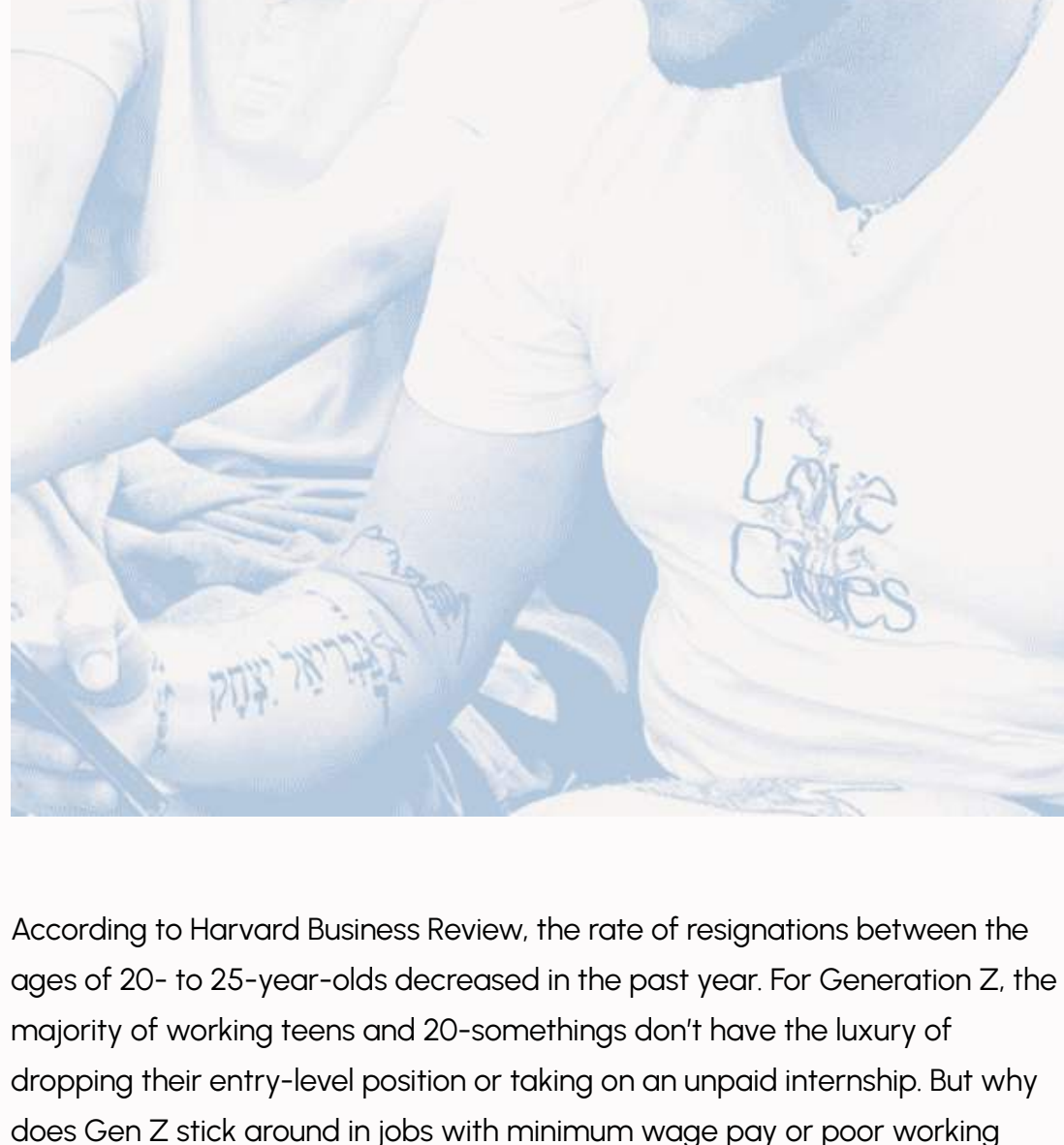
The Receipt is our research network of 8,000+ Gen Zers from across the world. It is the largest vetted Gen Z network in the marketing industry. We use the Receipt to pulse test ideas, concepts, and campaigns for our clients through quantitative surveys and enhanced in-depth insights from qualitative surveys. Our quantitative surveys can last from 1 to 3 weeks upon launch and can gather 500+ responses within a week, whereas our qualitative interviews depend on the exact project needs.

We also conduct focus groups Gen Z to Gen Z. No more phony consumer personas — only real conversation and insights. Lastly, we're fans of field research. Talking to Gen Zers like friends, not research subjects, is what we're about.

These research methods not only bring our clients valuable, actionable insights, but they also act as a platform to amplify the voices of our generation.

#### EXECUTIVE SUMMARY

2021 marks yet another year of extraordinary progress led by Generation Z. Amid an ever-tumultuous world, young people are reinventing how we view four key areas: work, culture, sustainability, social impact and travel. Through our pioneering research with The Receipt, JUV has solidified findings with both qualitative and quantitative insights powered by young people. As a play on the "whitepapers" published in traditional business and research, we present to you our first-ever Gen Z Yellowpaper. (You may have heard of Millennial Pink, but now it's time for Gen Z Yellow!) We categorized the unconventional ways Gen Z is changing the landscape of work, fast fashion, social impact and travel. We found that Gen Z is looking to bridge the divide between mental health support and work/culture. We are also grappling with our individualistic needs to show off style in our clothing choices while battling fast fashion's impact on the climate crisis. Young people don't want cancel culture; they want to work towards solutions. And we are cautiously optimistic that travel will rise again as COVID-19 vaccination rates rise. With 2022 among us, our behavioral and trend forecasting based on these findings will propel insights that cater directly to Gen Z's fundamental needs and truths.



According to Harvard Business Review, the rate of resignations between the ages of 20- to 25-year-olds decreased in the past year. For Generation Z, the majority of working teens and 20-somethings don't have the luxury of dropping their entry-level position or taking on an unpaid internship. But why does Gen Z stick around in jobs with minimum wage pay or poor working conditions? "Leaving one's job without a confirmed Plan B is a privilege that not all of Gen Z is awarded," says Waseem, the Chief People Officer at JUV. "Although some of us are exploring our passions through The Great Resignation, others are inclined to stick it out at their jobs due to having their own responsibilities (family, education, cost, etc.)."

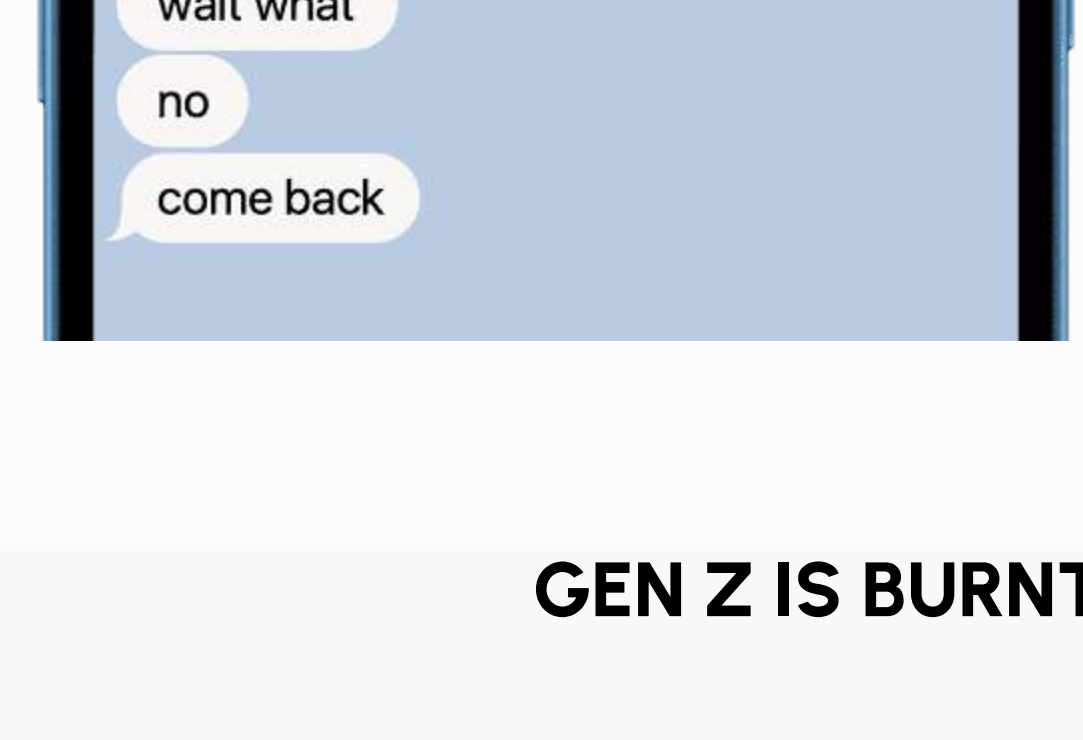
But Gen Z dreams of a more transformative work culture that bridges the gap between work-life balance and mental health needs.

### Work Culture

#### BIG BRAIN ENERGY.

In 2021, The Great Resignation dominated headlines. Over 4 million American workers left their jobs in July 2021, according to the U.S. Bureau of Labor Statistics. But is Generation Z a part of that cohort?

Viral social media posts may lead you to believe so. Thousands of Message conversation screenshots circulated Twitter during the fall of 2021, with many entry-level workers working in their service sector telling off their demanding and unsympathetic managers. The validity of these messages? To be determined. Some exchanges may have been real, but as the internet tends to do, a meme movement was born.



### GEN Z IS BURNT OUT OVER WORK.

While these "freaking boss" text exchanges may not be true, the underlying sentiment is real. Gen Z is stressed. 32% of Receipt survey respondents said that trying to meet their boss's expectations gave them the most stress. Given that most of Gen Z's bosses are from older generations, there is already a preconceived notion that the younger generation is less capable than its predecessors. While Generation Z may have less experience in the workplace, that does not necessarily mean they don't experience a great deal of pressure to surmount these negative stereotypes.

#### GEN Z IS BURNT OUT OVER WORK.

Forget "rise and grind." Gen Z is ready to rest and reset. Just one thing is stopping them: their incessant thoughts of work. Over 50% of survey respondents said they think about work frequently during their time off.

But can human resource departments alleviate the issue? Only 10% of survey respondents said that mental health support is a job benefit that would help them maintain work-life balance. From a first glance, this may not be a benefit that Gen Z prioritized over setting their own work schedules. 35% of respondents said they would prefer to have completely flexible hours.

Keep in mind that many Gen Zers are not working yet, or are in entry-level positions that don't afford them the ability to experience many benefits like mental health support. However, as the workforce shifts, employers may find flexible hours may attract more Gen Z talent than the ping-pong table fluff Millennials were used to being included in job descriptions.

"Practicing self-care is also something incredibly important to having a good work-life balance. Even when you feel super stressed, if you pay attention to yourself and your needs, you'll have control."

— Srilekha Cherukuvada, Content Contributor, 17, United States

#### OUR 2022 FORECAST

As COVID variants continue to grow, so does Gen Z's hunger for more flexible work opportunities. Key words such as "remote" and "hybrid" will continue to increase as Gen Z enters the corporate world. However, they will be expecting a transition from online schooling. Using company culture as a tool to bring community will be an especially important factor in retaining young talent, especially when the actual work can feel similar to their remote jobs.

Hosting small, RL opportunities (with COVID policies enforced) to meet coworkers in-person can make this life transition a bit more concrete and valuable to Gen Z.

#### QUICK ZTATS\*:

48% of respondents said that consuming content (watching TV, scrolling through social media or reading a book) is one of their top activities for unwinding from work, followed by quality time with family and friends at 39%.

Insights are based on a JUV Receipt survey sent in 2021 ("Gen Z Work Life Balance"). 308 respondents, aged 14 to 24, conducted online in May 2021; average respondent was 18 years old.

### Fast Fashion

If life were a video game, Gen Z would be the final boss in Gen Z's way to sustainability. (Perhaps this video game metaphor is more relevant with the impending shift into Web3 and the metaverse.) The fast fashion giant took over headlines throughout the year as the hashtag #canceloddie earned 4 billion views on TikTok. With Gen Z as the primary consumers—and fashion guard—of fast fashion, how can a generation so concerned about the climate crisis also consume so much unsustainable fashion?

#### SUSTAINABILITY IS NOT THE TOP REASON FOR OUR SHOPPING DECISIONS.

Almost 75% of our Gen Z respondents said that price and style are equally important factors they consider when shopping for clothes—two factors that often are at odds. While fast fashion may cater to price consciousness and trends, over half of our respondents paid attention to the quality of the clothing material, a notorious value lacking in today's fast fashion. But as the sustainable fashion industry steadily grows, is Gen Z turning towards a less price-conscious option to hone in on their concern for the climate?

While the majority of our respondents don't currently own sustainable clothing or frequently shop sustainably, there's an overwhelming number of respondents who do plan to shop sustainably in the future. However, many of them note caveats such as "if it fits my budget" or "not any time soon" with a strong financial concern regarding sustainable clothing costs.

#### THRIFT SHOP 'TIL WE DROP.

Second-hand shops provide respite between price, sustainability and style. The top three reasons our respondents cited (in contrast, the top three reasons for shopping fast fashion were price, style and availability.) Thrift shoppers appreciate second-hand options for unique finds and vintage styles at low prices. However, many young people recognize their privilege in shopping for style's sake while others have no other option due to their socioeconomic status. Restored thrift shoppers are cautious of taking away clothing options from low-income shoppers who rely on second-hand items as a low-budget clothing source.

#### GEN Z IS (TRYING) TO MAKE SLOW FASHION TRENDY.

Sustainable fashion is taking social media by storm. Favorite sustainable Gen Z-centered ferme brands include Oddie, Goodfear, Cool is a Construct, and Ameyalawm.

Jensen and Elle, the Gen Z founders of Oddie, have taken matters into their own hands. Oddie's value statement encompasses solutions for everything that Gen Z is frustrated about when it comes to the fashion industry and more. It's no wonder they blew up on TikTok and already sold out their items.

Simultaneously, young fashion designers like Rua Carlot, Zara Waste Daniel, and URIMA ONO are not just using sustainable practices, but proving that slow fashion is trending. With sustainable styles dominating trend-watch lists, the irony behind fast fashion dupes is all too clear.

"If [a company] is actually going to post about [sustainability], go all the way. Don't just do one post. One post is performative. Don't spend your money and time on the marketing around the issue. Spend it on actually helping."

— Srilekha Cherukuvada, Content Contributor, 17, United States

### QUICK ZTATS\*:

- 44% of respondents feel that for-profit/private companies have a lot of responsibility when it comes to addressing environmental sustainability.
- 36% of respondents said that they shop at fast fashion stores "once every few months" while 26% of respondents said the same about shopping second-hand.
- 60% of respondents have bought second-hand items in the past year.
- 46% of respondents currently own sustainable made clothes.

Insights are based on multiple JUV Receipt surveys sent in 2021 ("Sustainable Fashion Survey"). 707 respondents, aged 14 to 24, conducted online in February 2021; average respondent was 18 years old.

### OUR 2022 FORECAST

Closest clean-up videos are on the rise as 2022 reinforces the shift from overconsumption to thoughtful shopping. Fashion influencers like 21-year-old YouTuber Ava Jules have discussed remote over buying trendy pieces only to wear them a handful of times. As the trend cycle continues to shrink, fast fashion giants may still produce as much textiles as 2021, but will be under increased scrutiny by Gen Z. A more curated, capsule wardrobe of high quality, "basic" clothing will be of more importance as Gen Z shifts from a teenage closet to young professional attire. Second-hand resellers like Depop and Poshmark will continue to grow, as many fashion influencers sell their former fabrics once a closet clean-up video goes live.

### Social Impact

While "OK, Boomer" may have fallen into social media's meme graveyard, the sentiment within Gen Z is still prevalent. Despite a pandemic that has spanned two American presidential administrations and three school years, prevailing worker strikes and continued institutional racism, Gen Z is angry. Often criticized for being "well-meaning but critical of their peers and older generations," this anger is not just a teeny-bop trend—it's a catalyst for change in 2022.

#### BEING UNDERESTIMATED MAKES GEN Z ANGRY.

56% of our Gen Z survey respondents feel underestimated at their jobs. This may not be unique to just our generation—every young generation has had its fair share of "you're older" talks from their parents.

But given the breadth of young changemakers like Malika Yousofza, the Parkland survivors, Amika George, Greta Thunberg, Amanda Stenberg, and countless more, Gen Z is harnessing the power of social media to enact social change in ways that were unimaginable in previous generations. Despite their youth, age is no obstacle for progress.

#### GEN Z RECOGNIZES THE POWER OF INTERGENERATIONAL COLLABORATION.

72% of survey respondents believe that older generations are standing in the way of Gen Z progress; hindering any opportunities to effectively work together.

Without intergenerational collaboration, Gen Z will be left out of conversations until we are the only ones left to have them. We will be the most affected by long-term policies enacted today, so we deserve to be part of the conversation that crafts those policies. Gen Z is incredibly eager to do the work required in shaping policy and industry to better reflect our needs.

### QUICK ZTATS\*:

59% of survey respondents want to cancel "cancel culture" — the social media phenomena of deciding a person or group is "over" because of poor past decisions.

Insights are based on a JUV Receipt survey sent in 2021 ("Coming of Rage"). 746 respondents, aged 14 to 24, conducted online in July 2021; average respondent was 18 years old.

#### OUR 2022 FORECAST

Gen Z will stray away from so-called "micro-activism" or bite-sized content surrounding social issues. The insights of popular, digestible content accounts like @impact have been losing engagement, as Instagram users begin to interact with smaller community pages and experienced activists.

But that's not to say that our values have shifted—not at all. Climate change, racial justice, and reproductive rights will always be a priority for Gen Z, as well, and will stay at large in 2022. But local, community-based and grassroots organizing will be more of a priority, and Gen Z will see more worth in physically doing instead of simply just reading and thinking online.



### Travel

As Hot Vax Summer exploded, travel arrangements suddenly made it back on Gen Z's radar. While the travel and hospitality industries did not bounce back to pre-pandemic levels, young people's optimism—and wanderlust on social media as influencers went on paid trips—grew by the month. As new COVID-19 variants continue to multiply, Generation Z is still banking on study abroad trips and vacations.

#### WHAT DOES GEN Z WANT TO DO WHEN TRAVELING?

From Etsy Itinerary templates to TikTok travel guides, Gen Z instills a bit of structure into their travel time. 48% of respondents said they prefer their vacations to be primarily structured activities, with some planned free time to rest or wander. With prior planning, this allows for young travelers to take advantage of the best deals, book activities with the most availability and rest easy on their actual trip.

#### WHERE DOES GEN Z WANT TO GO?

As for destinations, Gen Z wants to visit Asia and Europe the most, with Japan ranking as the top dream vacation spot. Why? Japanese media, such as anime, is especially popular with young people. Just the hashtag for Attack on Titan, a popular series, and its final season airing globally in early 2022 has taken over 2 billion views on TikTok. Plus, the technology and futurism in Tokyo and other Japanese cities are incredibly appealing to a tech-native generation.

#### GEN Z CARES ABOUT THEIR IMPACT AS A TOURIST.

31% of Gen Z respondents said that cultural appropriation was something that they thought about when deciding on where to travel. Another 29% consider the economic impact of tourism on the localities they visit.

#### QUICK ZTATS\*:

- 19% of respondents considered pollution and land degradation as important factors to consider when planning a trip.
- 29% of respondents decided that trying new food was in their top two favorite activities while traveling.
- 74% of respondents said that 1 to 3 weeks is the ideal length of time for a vacation.
- 46% of respondents get most of their travel inspiration from social media.

Insights are based on a JUV Receipt survey sent in 2021 ("Coming of Rage"). 746 respondents, aged 14 to 24, conducted online in July 2021; average respondent was 18 years old.

#### OUR 2022 FORECAST

31% of Gen Z respondents said that cultural appropriation was something that they thought about when deciding on where to travel. Another 29% consider the economic impact of tourism on the localities they visit.

As the IRL to virtual school cycle continues, some US colleges and public school systems are opting to go online for the first few weeks of 2022. Many students are understandably frustrated and are expecting to cancel travel plans, or postpone travel back to college towns for the time-being. Gen Z wants to feel confident about their next travel plans, but may stick to road trips or staycations for the time being as to not invest too much money on non-refundable plane tickets. However, with the circulation of multiple vaccine boosters available within the United States, personal safety and risk factors vary among individuals. With the highly transmissible Omicron variant, the odds are not in Gen Z's—or really, anyone's—favor.

### What's in store for 2022?

#### JUV CONSULTING METHODOLOGY

##### How Do We Approach Forecasting?

By analyzing trends recorded on a weekly basis, our Director of Insights Sophia Delosierio leads JUV's methodology for predictions based on the raw and authentic pulse of a 17-year-old Gen Zer. Numbers and statistics from TikTok views and hashtags count: fuel the validity of our Gen Z oracle. Come peer into the future of the youth's fashion, communities, entertainment, music, and more...

#### TIKTOK: TAKING A FULL-TIME POSITION AS A HUMOR-CONTENT DRIVEN APP.

We've known TikTok as the app that skyrocketed to fame due to the likes of Charli D'Amelio and Dagny Carter. But it's changed so much since the start of the pandemic and will continue to do so in 2022. Our new packed schedule will give us less time to learn crazy choreographed dances (which was once TikTok's staple).

**WHAT ARE MAINSTREAM CREATORS POSTING?** The recent videos made by Charli D'Amelio and Addison Rae, who rose to stardom due to their dance skills, are all close-ups of their faces, creating more "casual" content, as opposed to dance videos.

TikTok will shift to humor full-time, even with dance challenges like the "erk" are a lot more funny-involved, with users taking their coworkers or classmates to try (and ultimately, fail).

With this also comes more vulnerability on TikTok to share emotion, their daily lives, or even ask for help. So this year, your typical Hypa House influencer won't have any pull — rather, it's the funny creators that find unique spins on jokes that'll continue to thrive.

**WHAT ARE THE NUMBERS?** The comedy lip-sync audio "It is so bad, I want to give you a zero" gained over 600K videos, while a trending meme video trend like Smokey Link 2.0 only gained 20K videos.

Trends relating to manifestation will be even bigger this year, as well as, montage/photo dump TikTok and product review accounts. And even though short-form content reigned supreme in 2021, long-form may be making a comeback, with TikTok shifting to 3-minute videos.

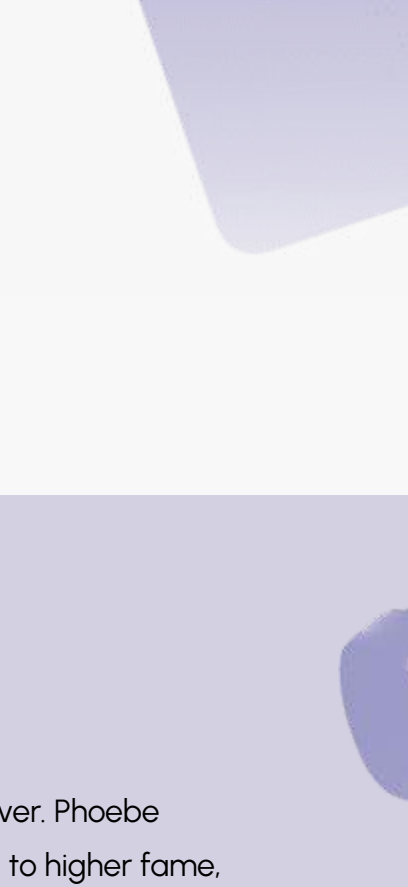
**HOW DO YOU MANIFEST ON TIKTOK?** The whimsical sound known as TikTok or the "Manifestation Audio" has gained over 17M videos made. Users that speak what they want into existence on the app get high engagement, with the community cheering their desires on.

#### WE'LL ALWAYS WANT TO KNOW WHO'S BEHIND THE BRAND.

Gen Z will need to know who's behind the brand or at times, Zara Pavez, the genius 23-year-old behind the Duding TikTok account let Gen Z's humor shine, exhibiting it through their own mascot costume. She took the chaotic and snicker-squir that was already assigned to the brand's mascot by Gen Z memes and combined it with her own IRL personality to create the perfect viral hit.

Nowadays with Twitter accounts of Spiderman, No Way Home and Percy Jackson, The Lightning Thief brands can no longer just resonate with Gen Z. Their social media employees must have a completely unique and original personality that shines through the screen.

**WHAT ARE THE NUMBERS?** @dudding on TikTok amassed over 2 million followers, with increasingly high engagement and views on each video — especially those that were pop-culture relevant or had a Gen Z inside joke.



#### REUNIONS WITH OUR PAST ON HBO MAX.

Streaming is going to have an even bigger presence in 2022. For young people, theaters are only reserved for the theater experience (as opposed to actually seeing the movie. Ease and accessibility takes reign over quality for Gen Z, so we've seen Blu-ray and DVD become practically obsolete. Theatrical runs and visits will decline further this year.

That, and reboot shows reminiscent of our childhood (whether they be in the same universe or have grown-up child actors reprise their roles) will shine in 2022. We've seen Carly and Gossip Girl get full on scripted reboots, and also classic reunions between the casts of Friends and Harry Potter. This format will continue to soar this year with Gen Z's favorite childhood shows and fandoms.

#### THE RETURN OF INDIE SLEAZE AND THE RISE OF BALLETCORE.

The fashion subgenre known as "Indie Sleaze" is coming back; this means layers upon layers, strappy accessories (popularized by Zaynaya), and neutrals will continue to rule. Androgynous, genderless fashion styles will be on the rise this year.

There will be two extremes on the scale of aesthetic: cybercore/dressed style + vintage academic style. Knee-length platform boots, which can toggle both extremes, will be a huge trend in 2022.

Balletcore (popularized by Olivia Rodrigo, Madison Beer, and Ariana Grande) and ballet flats will soon shift to the general public.

**WHAT'S ON THE RUNWAY?** Prada released a shiny heeled ballet flat, which gives a sneak peek of next year's shoe silhouette. Another sign of Balletcore! and its gradual rise is the long, opera silk glove and puffer dress trends that plague Pinterest boards and Instagram photo dumps.

#### WHAT ELSE IS IN OUR GEN Z CRYSTAL BALL FOR 2022?

NYC is the new LA for young people. Sorry, LA — you're becoming old news (as popularized by Gossip Girl reboots, TikTok, and more!).

Gen Z's spiritual side (similar to the manifestation TikTok trends) will continue to be explored in various ways, with tarot, energy, frequency, crystals, and healing being popular search terms on Pinterest and TikTok.

The Kardashians-esque, overly perfect Instagram feed is dead. Casual Instagram is how creators and influencers will connect to their audience — not when the content looks like it's sponsored.

eSports and gaming culture aren't going anywhere — social gaming, virtual concerts and events, and VR will dominate in 2022, as gaming console demand continues to exceed supply even one year after its release.

Want to learn more? REACH OUT TO SHAINA, CMO AT JUV

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#### ABOUT THE AUTHOR

### Steph Strickland

Steph Strickland is currently working under contract as the Director of Research for JUV Consulting. Upon graduating from the University of Florida in 2020, the data-enthusiast began similar contract roles conducting qualitative and quantitative research for private and public institutions. She decided to take this flexibility a step further when she set off the Appalachian Trail, a 2,000+ mile footpath across the Eastern United States, and submitted freelance pieces to The Trek, an online backpacking publication, to document her travels. Steph is in the process of completing her M.S. in Media Science at Boston University and is passionate about taking career steps off the beaten path.