



Genzilla

THEY'RE COMING. GET READY

VIETNAM- SEP 2015

A market research company on a mission

Brands in Asia are experiencing disruption as consumers adopt new technologies and interact with products and campaigns in new ways.

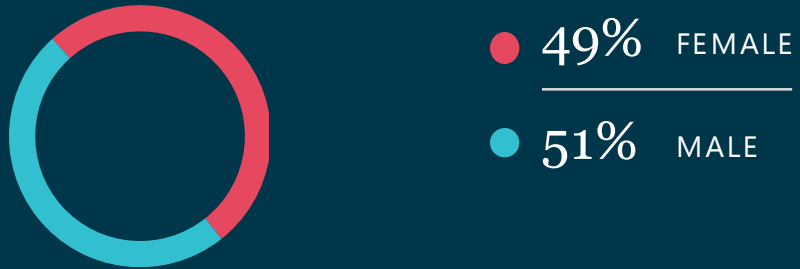
We are here to change the decision making process, making your marketing more agile and more connected to your consumers' changing habits.

We say it's time to digitalize.

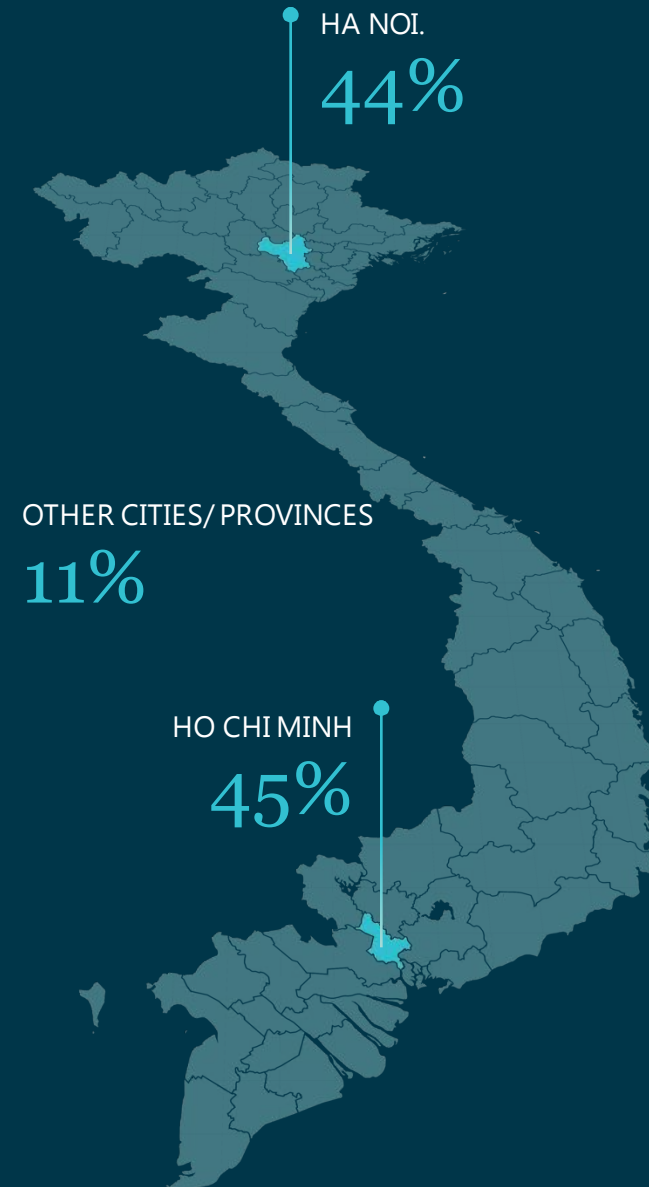


Respondents' profile

Gender



Age



Gen Z is the new black

14.4^{mil}

POPULATION

2,441,509^{vnd}

TO SPEND PER MONTH



Entering the
labour force

FOR THE FIRST TIME!

The definitive
truth about
Genzilla:

Born in a digital world with
full access to information

Digital vs. physical is a very
blurred line.

Only know the good time.

Genzilla

7 KEY FINDINGS



1

GenZilla enjoys being
out and about





Activities enjoyed (%)



Unlikely to be
terrorizing the
city

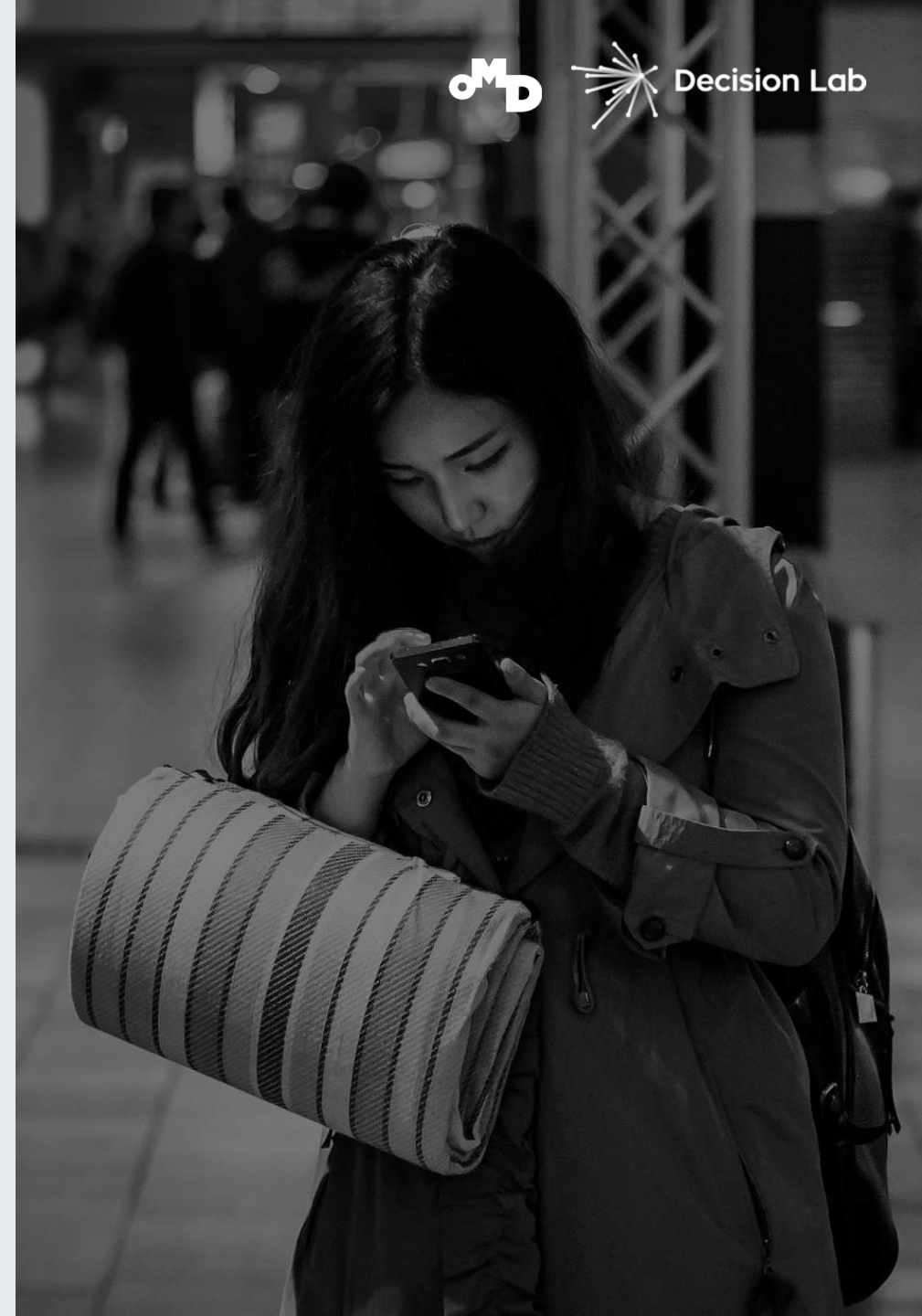
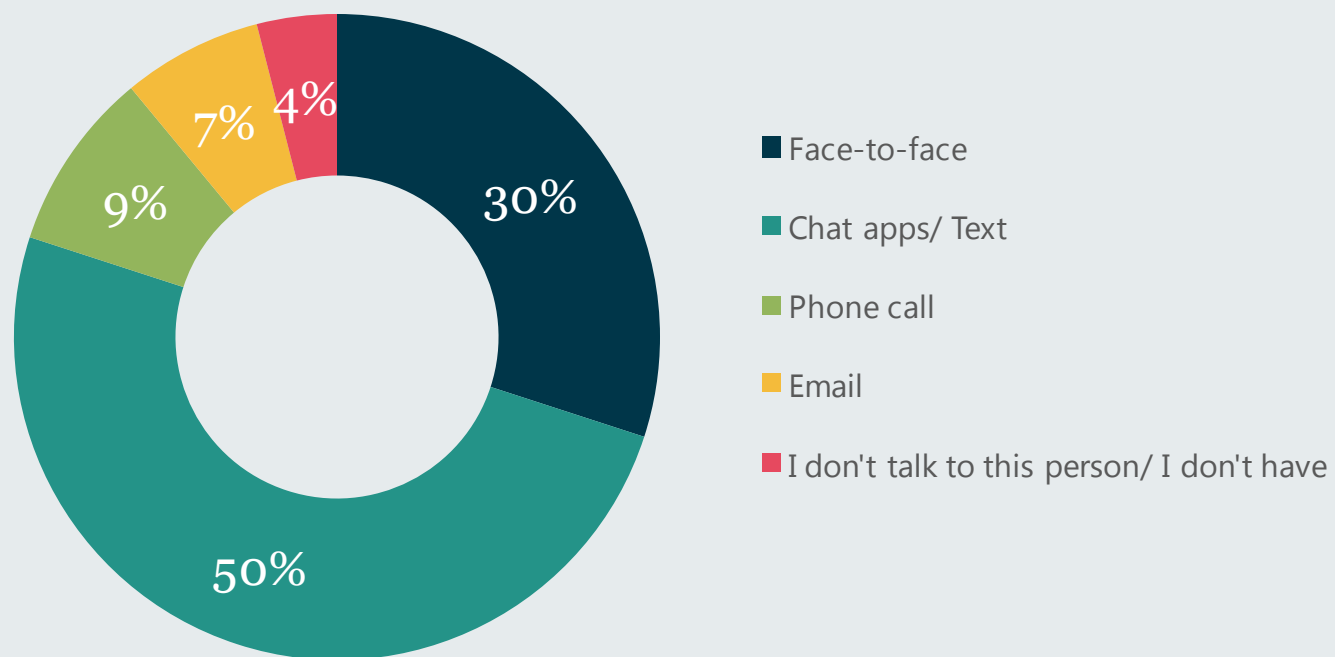
GEN Z REALLY JUST
ENJOY BEING
ONLINE, HANGING
OUT AND
COCOONING AT
HOME

Q1 & 2: Which of the following internet / non internet activities do you normally do in a typical week?

n=710

Most comfortable with friends behind the screen

Most comfortable method of contact with friends (%)



Genzilla's primitive language



47%

PREFER TO EXPRESS THEIR FEELINGS
THROUGH STICKERS / EMOTICONS /
EMOJIS

Emoji is the next-big-thing



Emoji is the next-big-thing



Social Media Explained



-  I'm eating bacon
-  I like bacon
-  I have skills including eating bacon
-  This is where I eat bacon
-  Watch me eat my bacon
-  Here's a vintage photo of my bacon
-  Here's a recipe with bacon
-  I work for Google and eat bacon
-  I'm listening to music about bacon

©COREY SMITH

coreysmith.ws

Existence validated by their
social media presence

2.77

SOCIAL NETWORKS USED WEEKLY

A social evolution

My relationship with people around me gets better when we stay connected online

60%

I use online social network to expand my friend circles-more friends more fun

55%

The first thing I normally do when I am bored is to look for friends online

47%



45%

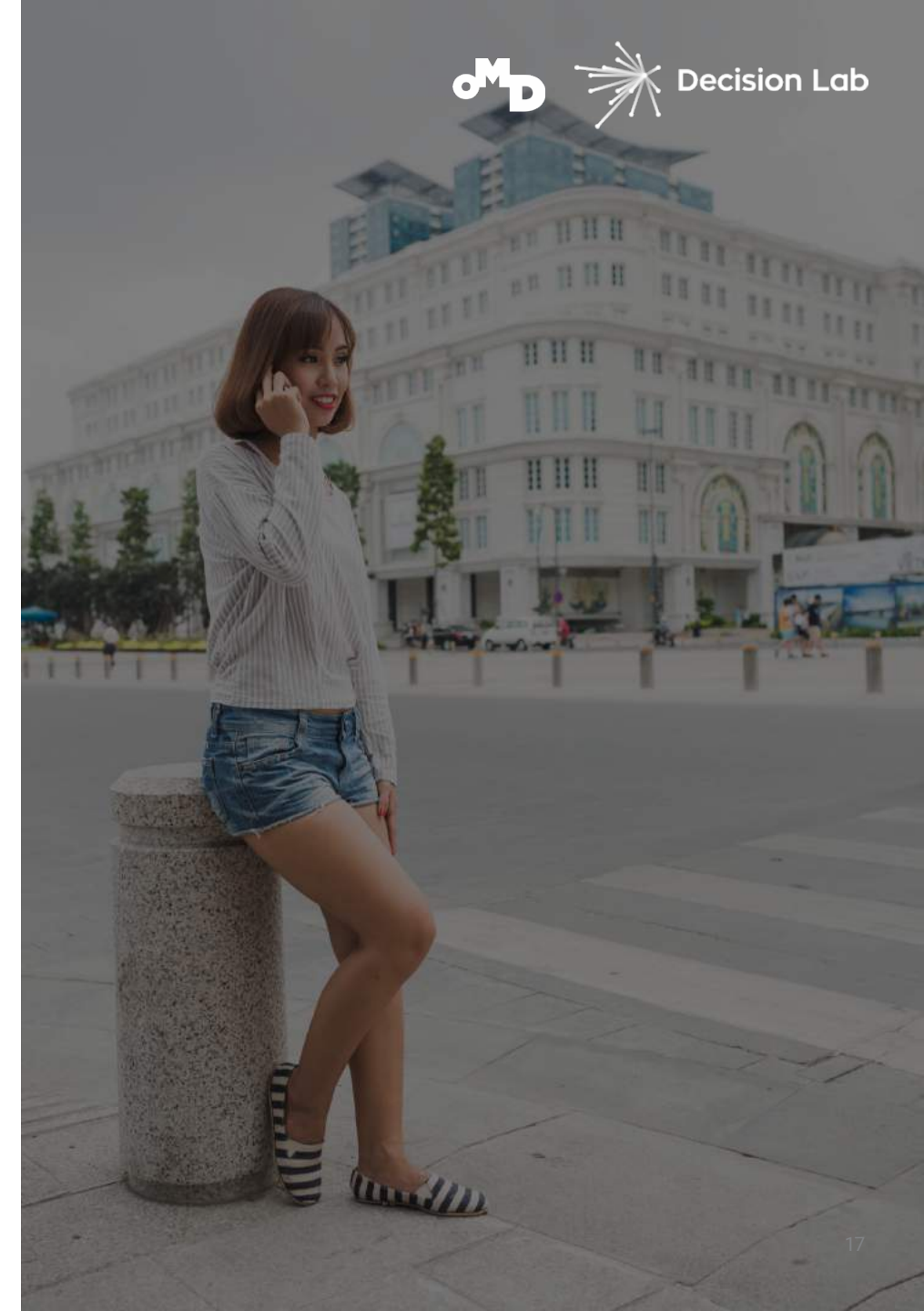
AGREE THAT THE NUMBER OF LIKES /
COMMENTS ON A SOCIAL MEDIA
POST SHOW HIS / HER POPULARITY

51%

FEEL THAT THEY'RE NOTICED WHEN
PEOPLE COMMENT AND LIKE THEIR
POSTS.

2

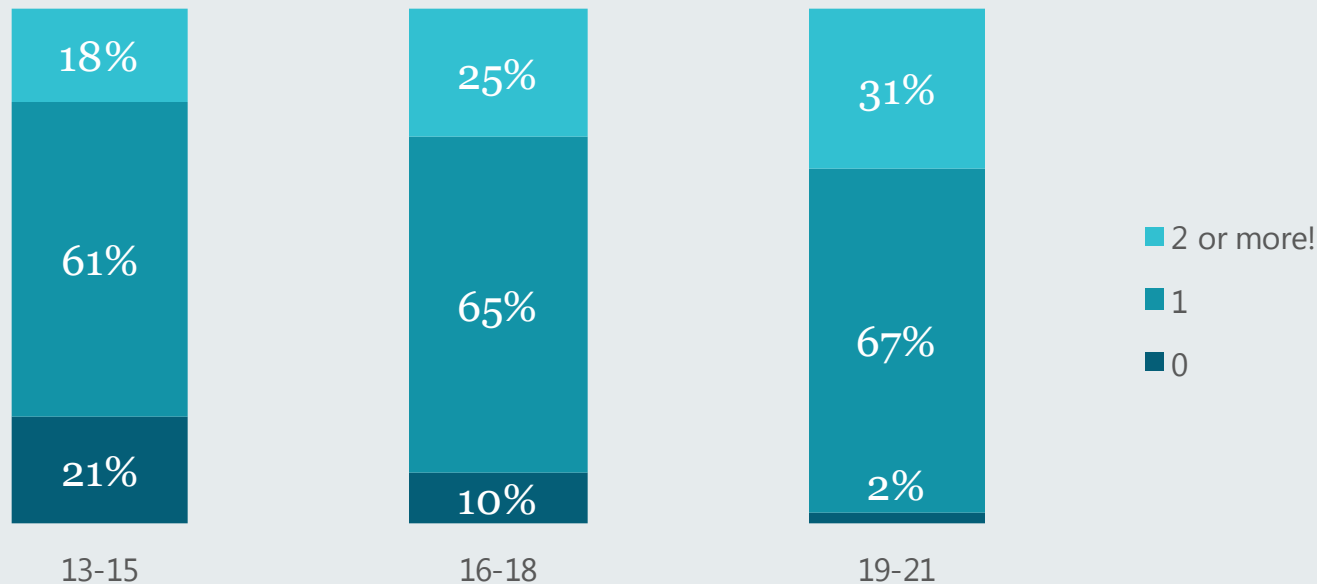
The mobile phone is GenZilla's lifeline





Almost all have a mobile phone – even those aged 13-15

Number of mobile phones (%)



Q20A: How many mobile phones do you have / own?

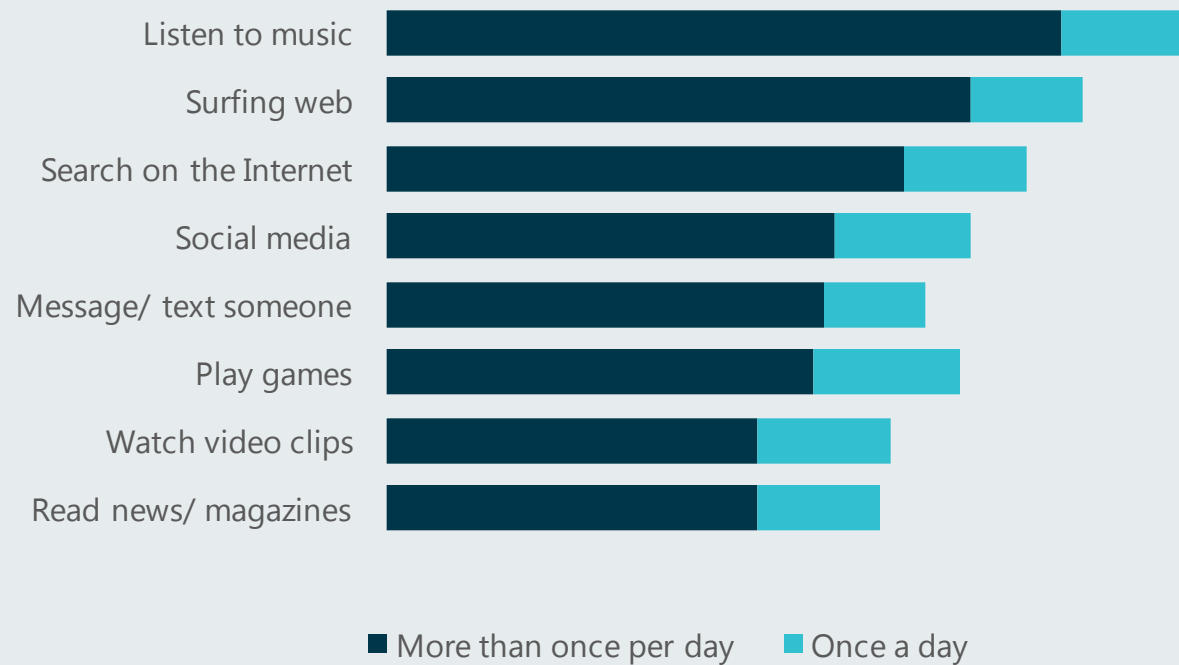
n=710

1.33

MOBILE PHONES PER PERSON

What they do online, they do on their mobile

Activities done on mobile phone (%)



Q22: How often do you do the following on your mobile phone itself? (n=710)



Nomophobia

IS FEAR OF BEING
WITHOUT A CELL
PHONE.

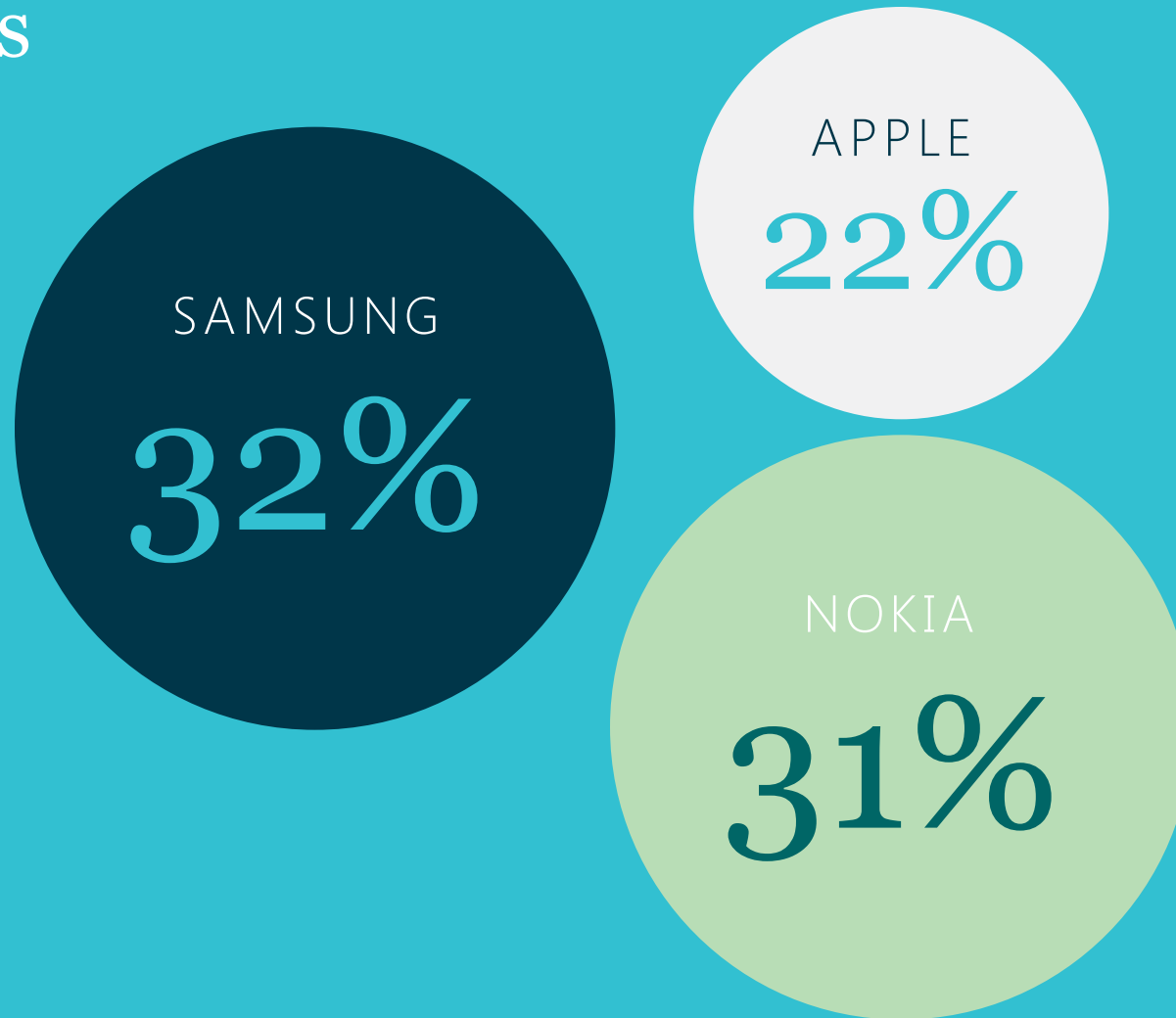




Phantom vibration syndrome

THE PERCEPTION THAT
ONE'S MOBILE PHONE
IS VIBRATING OR
RINGING, WHEN IN
FACT THE TELEPHONE
IS NOT DOING SO.

Mobile brands



A mobile distraction

28%

SEARCH INFORMATION
ABOUT CAST OR
CONTENT OF THE
PROGRAM

27%

DISCUSS THE
CONTENT OF THE
PROGRAM WITH
FRIENDS

25%

SEARCH FOR BRANDS
/ PRODUCTS SHOWED
IN THE PROGRAMS

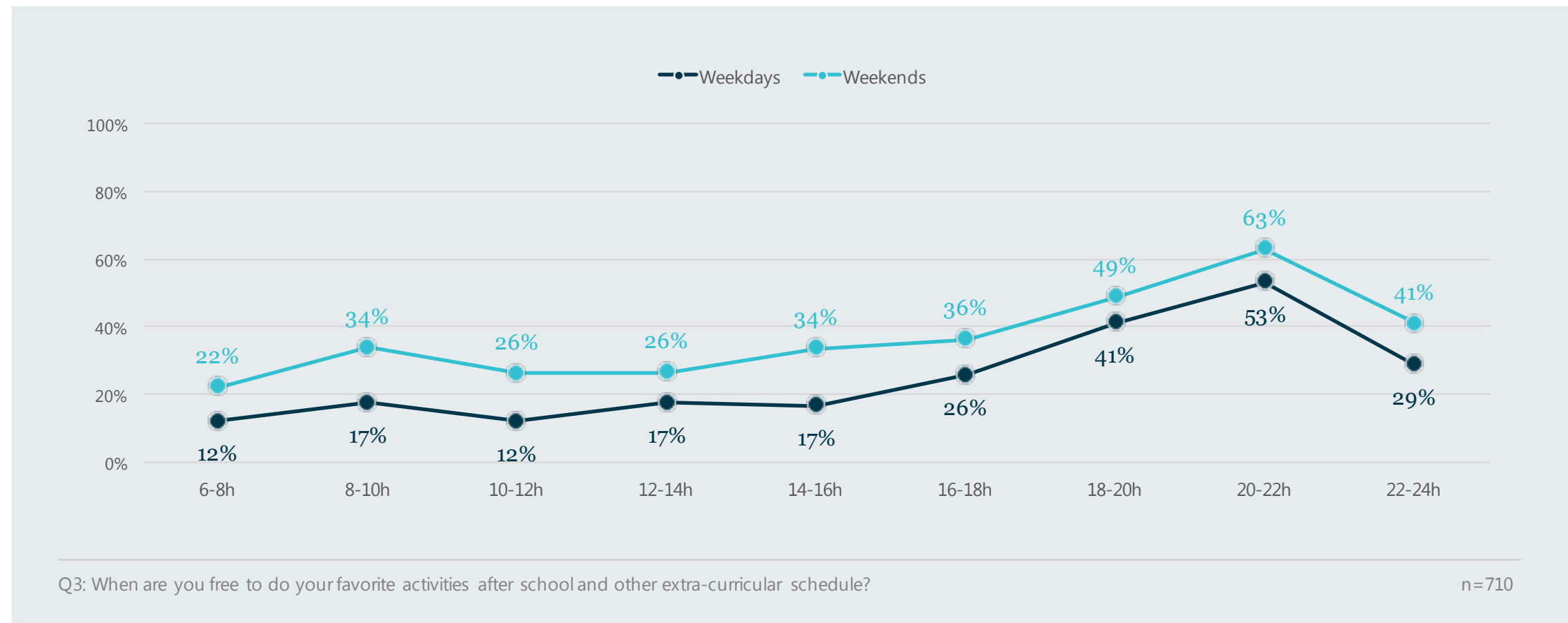


Cô dâu 18 tuổi



Best time to capture
genzilla's attention?

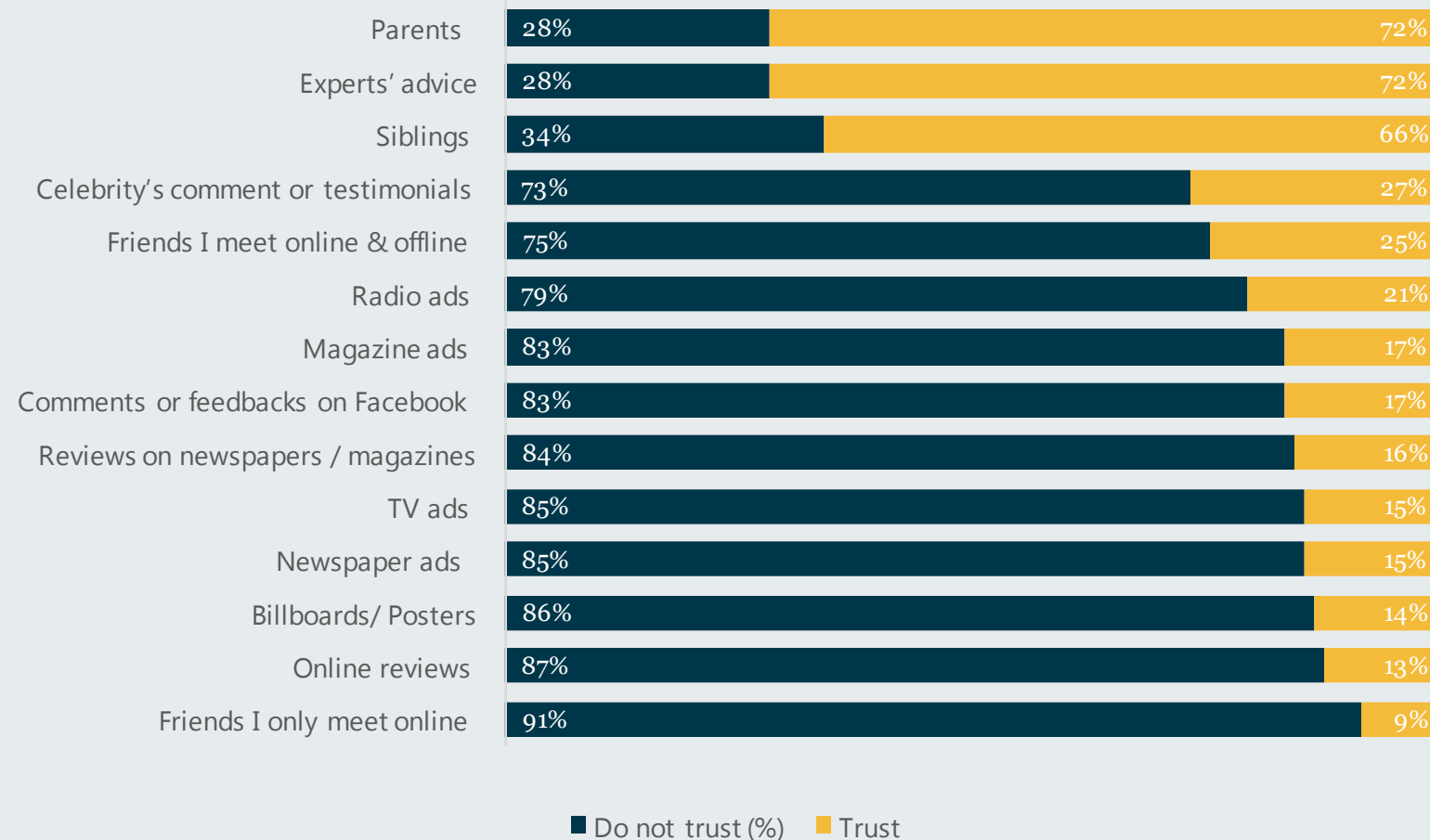
Best time to reach Genzilla





GenZilla trusts the
internet.





Genzillas are
more skeptical
than you think.

Q15: Please rank how much you trust each type of media and the different people in the list below. (top 2 boxes)

n=710

Hollywood Breaking News - Jackie Chan died after perfecting a deadly stunt. Jackie Chan falls from a building of 12 floors. C.S.I are currently investigating. Watch the original video of the deadly stunt and their effort to save Jackie Chan. (for 18 years and above)



Like · Comment · Share · about a minute ago via Celebrity News · 1

a

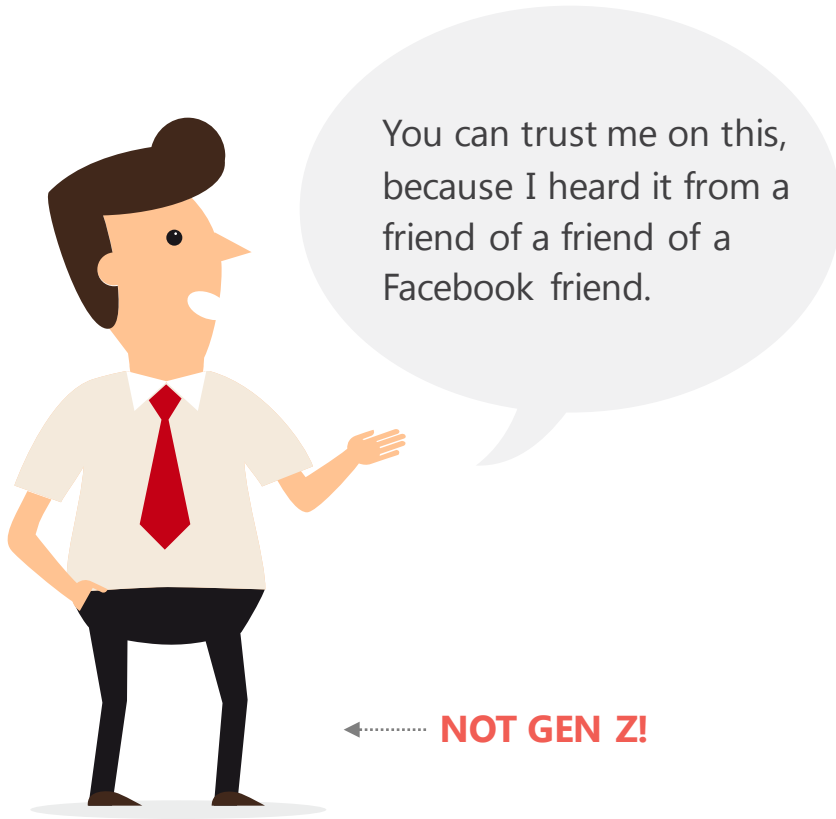
Q24: How much do you agree with the following statement? (5 point scale) (n=710)

They're careful not to fall for the bait!

ONLY

27%

AGREE "I TRUST
INFORMATION FRIENDS
SHARE ON SOCIAL MEDIA"



Genzilla is discerning online

The **original source** of the information shared must be trusted and credible; **not just the person** who is doing the sharing. Nothing online is taken at face value.

4
GenZilla only care about
themselves!

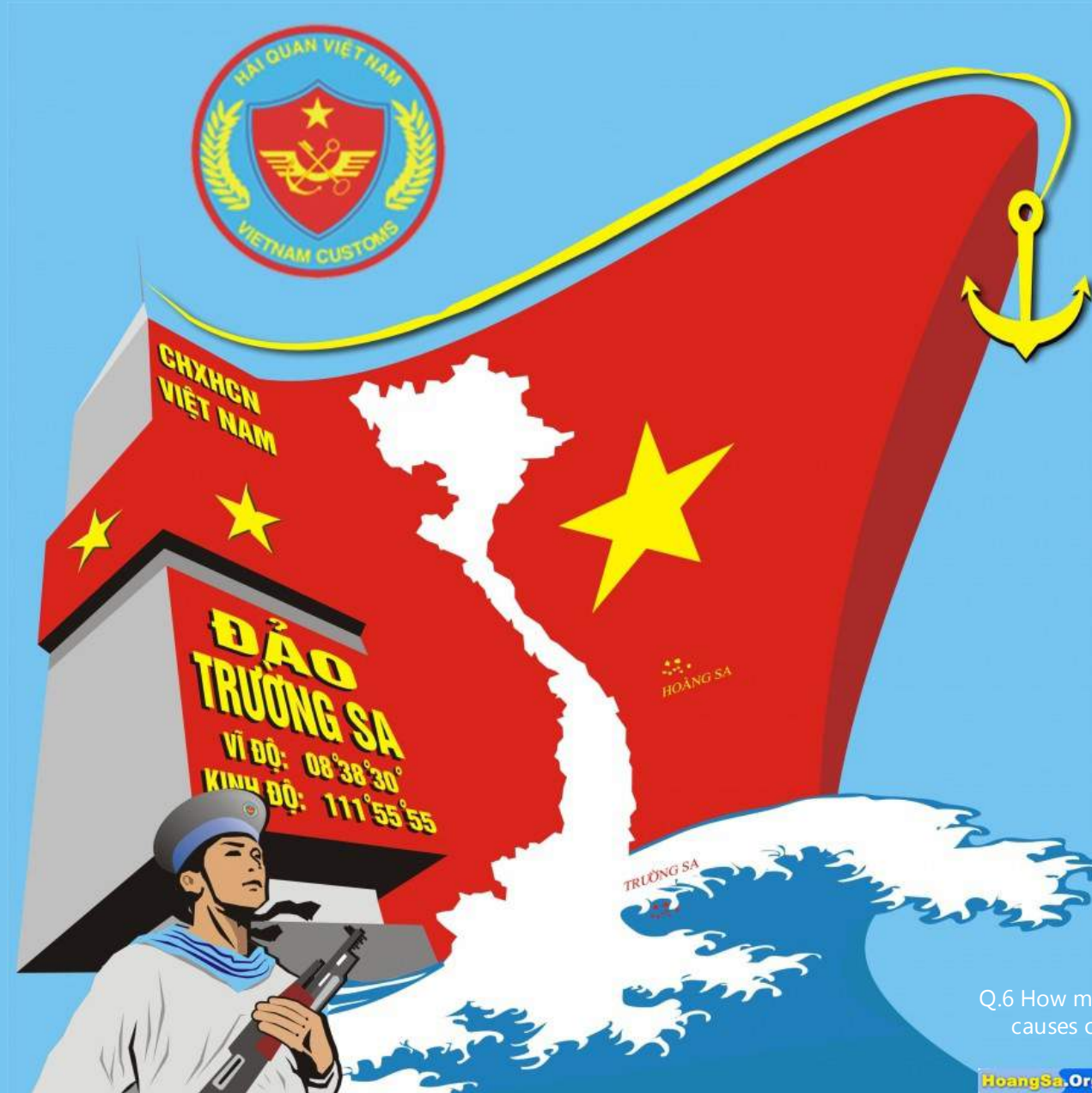




77%

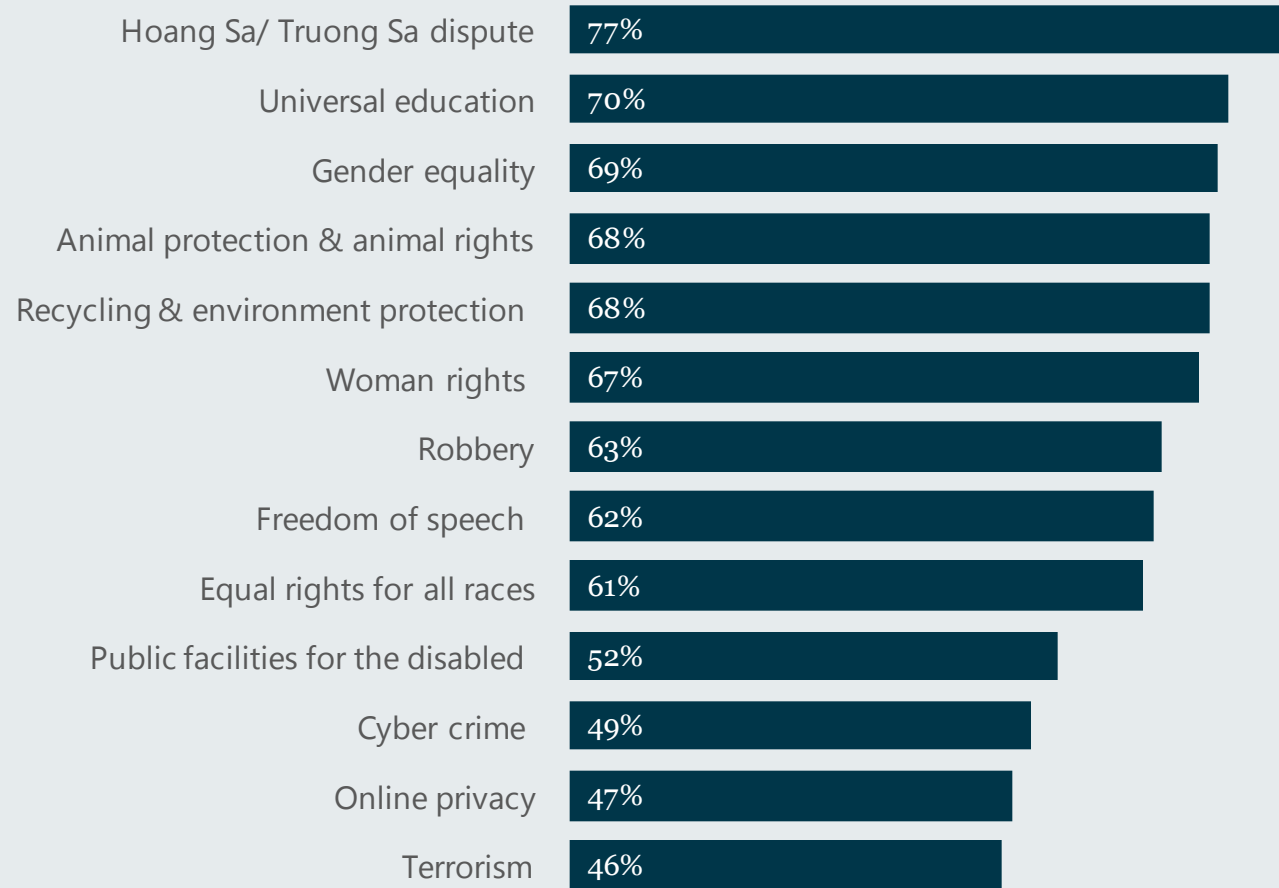
HOANG SA TRUONG
SA DISPUTE IS

the top
concern



Q.6 How much do you care about the following causes or happenings? (top 2boxes) (n=710)

Concerned with social issues



Q6: How much do you care about the following causes or happenings? (top 2 boxes)

n=710

It's cool to stand up for something

GROWING UP IN A TIME OF AWARENESS ON SOCIAL ISSUES, GEN Z HAS A STRONG DESIRE TO GET INVOLVED.

THEY ARE MORE LIKELY TO SUPPORT BUSINESSES THAT SERVE A HIGHER PURPOSE.





GenZilla suffers from perpetual child syndrome

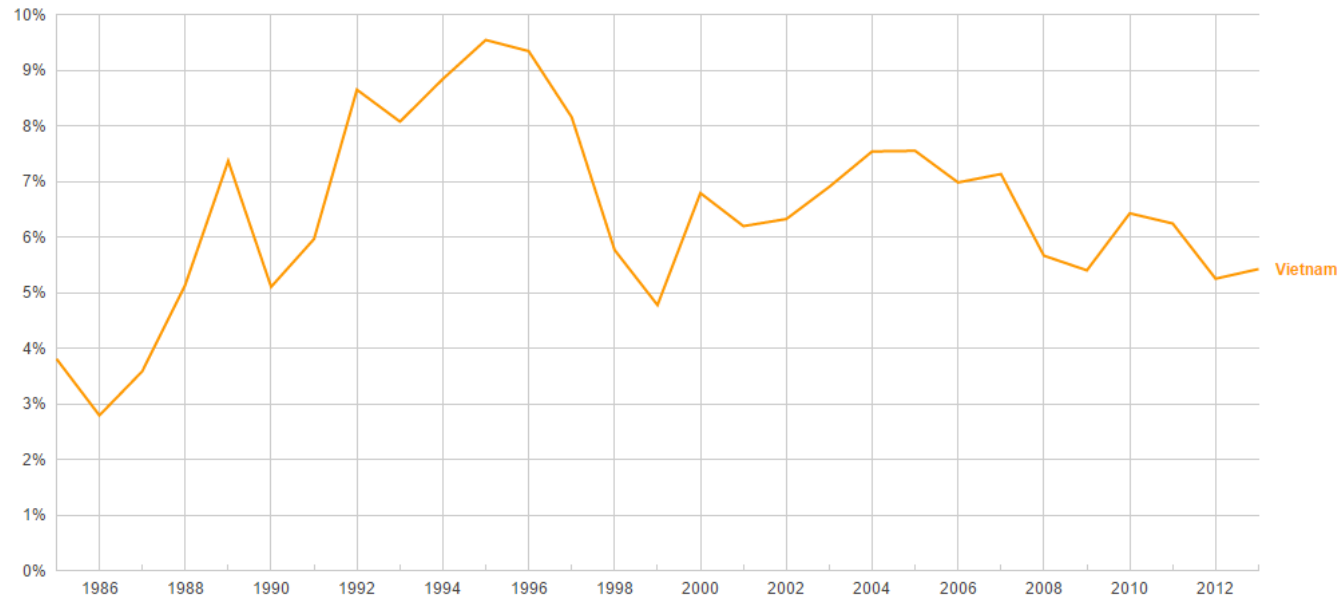


The rise of the nuclear family

GEN Z BECAME THE CENTER OF
ATTENTION



Vietnam GDP Growth Rate (1986 - 2012)

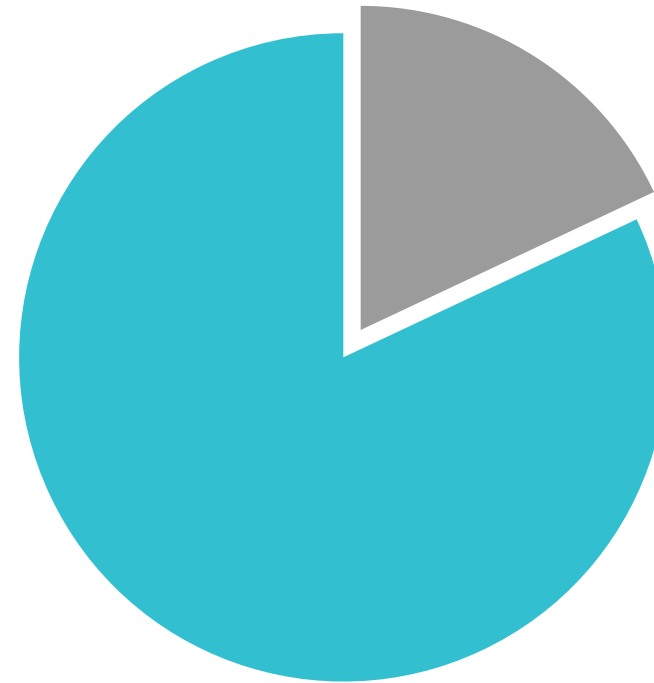


Genzilla grew up in a generally healthy economy

Source: World Bank

82%

ADMIT THEY LIVE BETTER
LIVES THAN THEIR
PARENTS GENERATION



A little too comfortable at home

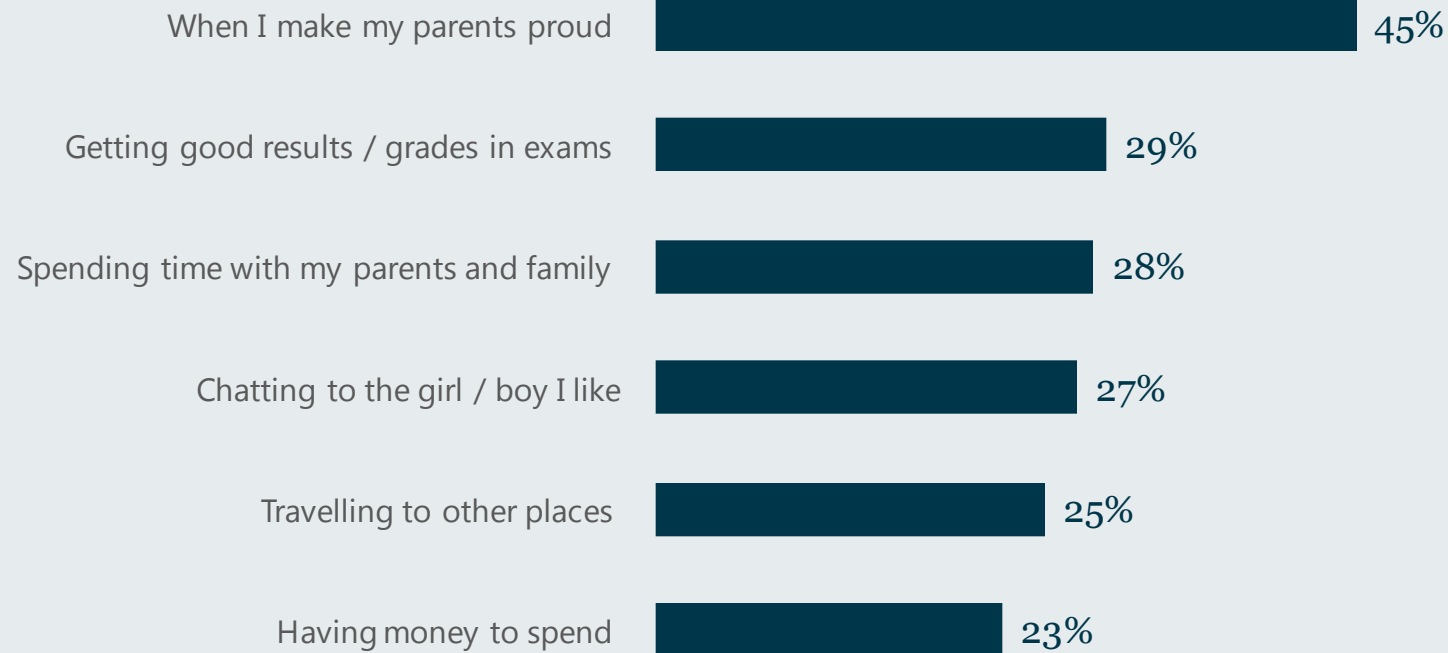
“I can’t wait to grow up and move out of my parents house”

60%

DISAGREE!



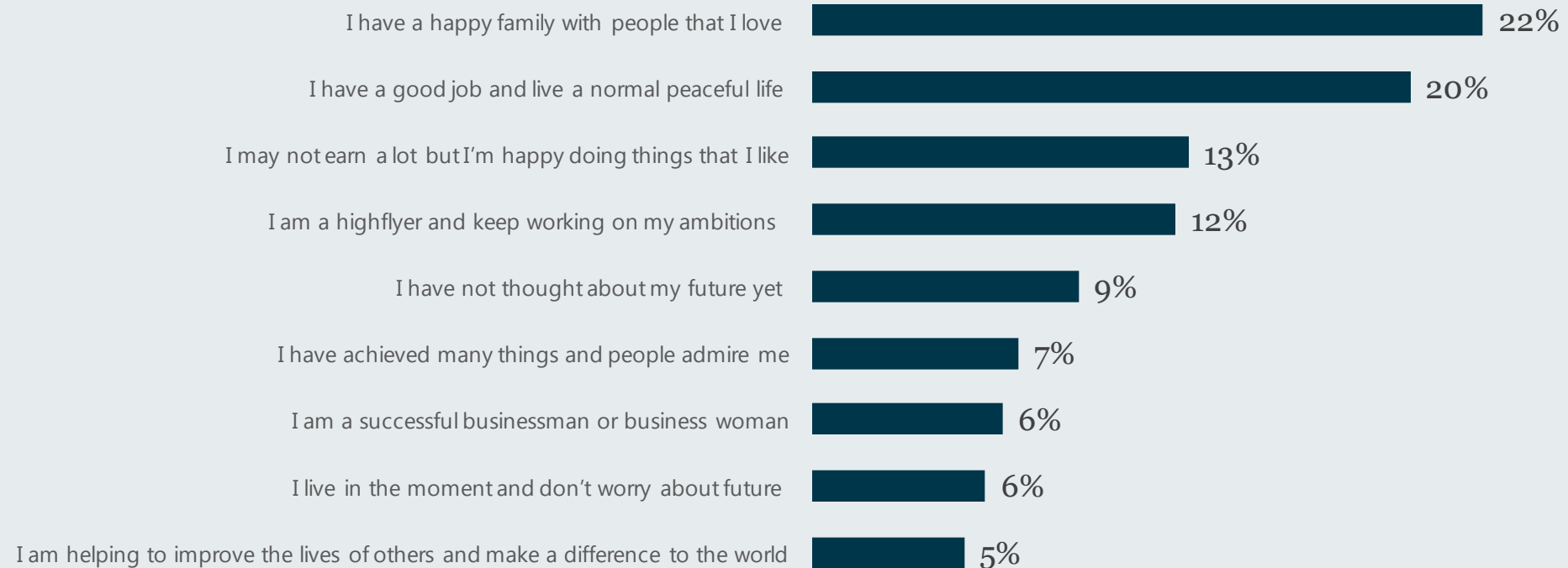
What makes genzilla happy?



Q5: What make you happy the most? (Top 3 boxes)

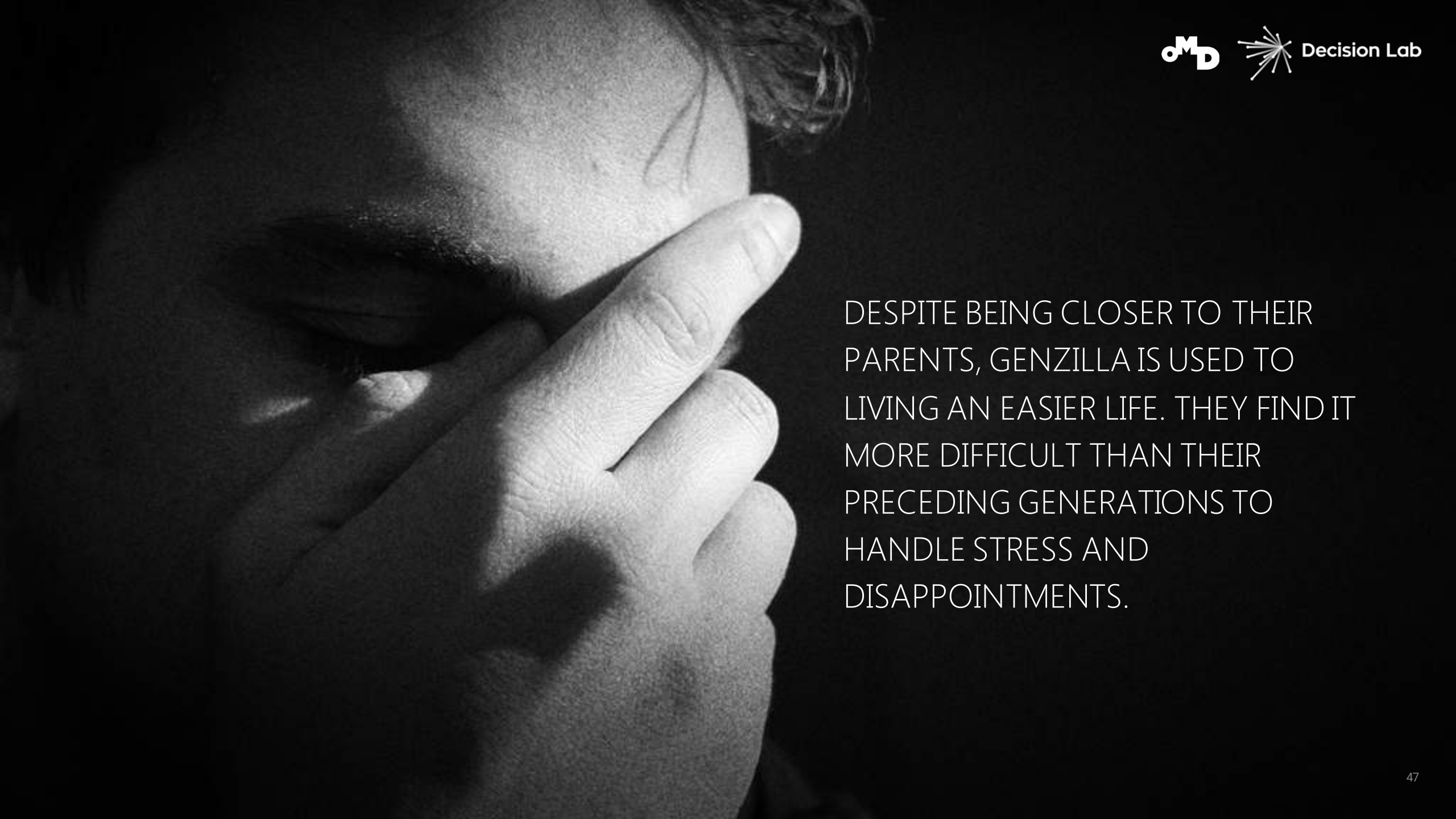
n=710

Genzilla's future outlook



Q7: Look into your own personal crystal ball, which best describes what you think your future will look like?

n=710



DESPITE BEING CLOSER TO THEIR PARENTS, GENZILLA IS USED TO LIVING AN EASIER LIFE. THEY FIND IT MORE DIFFICULT THAN THEIR PRECEDING GENERATIONS TO HANDLE STRESS AND DISAPPOINTMENTS.

6
GenZilla is confident and
knowledgeable





A creature of confidence

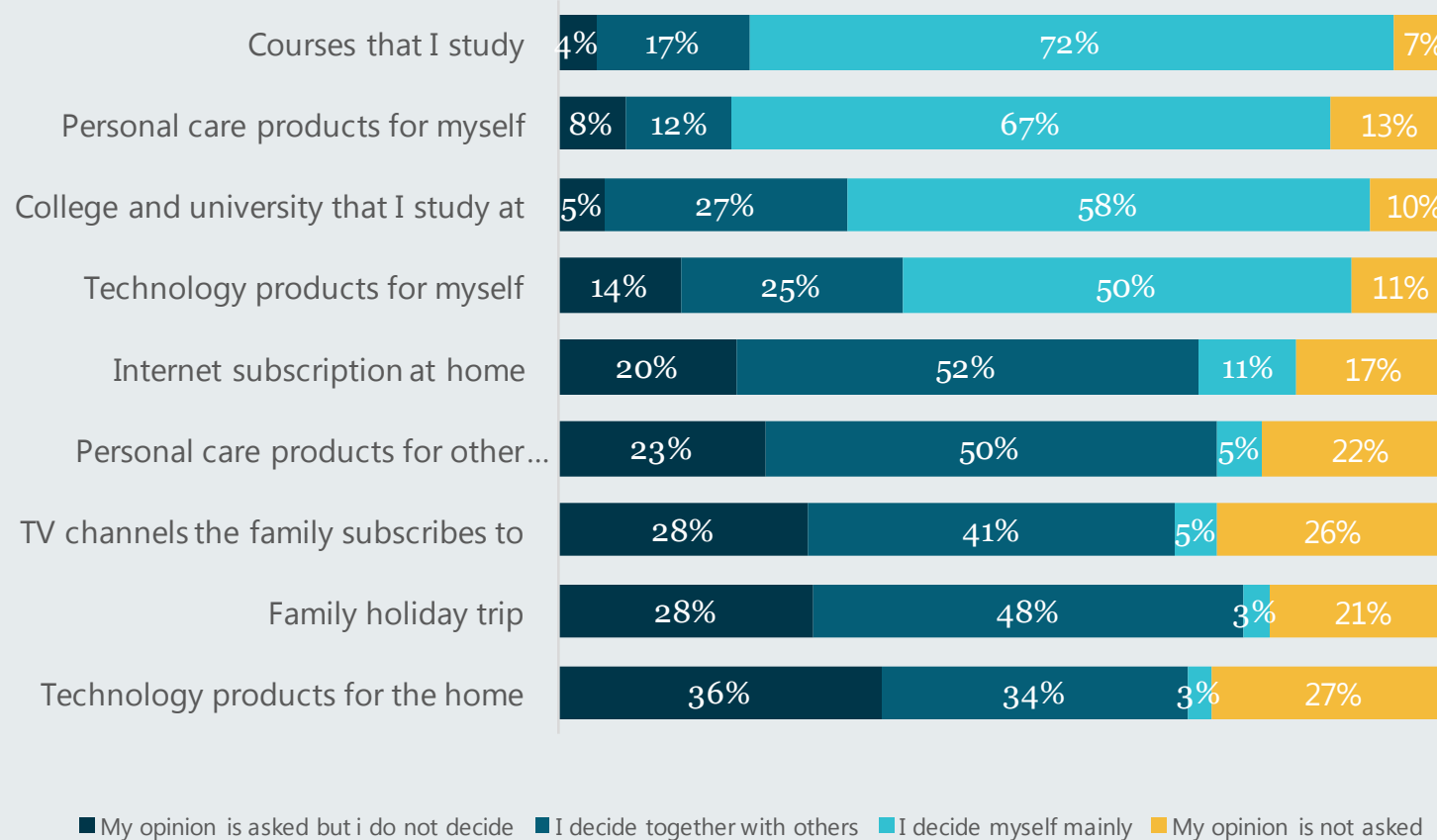
83%

KNOW MORE ABOUT TECHNOLOGY THAN THEIR PARENTS

30%

KNOW MORE ABOUT TECHNOLOGY THAN THEIR FRIENDS

Influence on decisions (%)

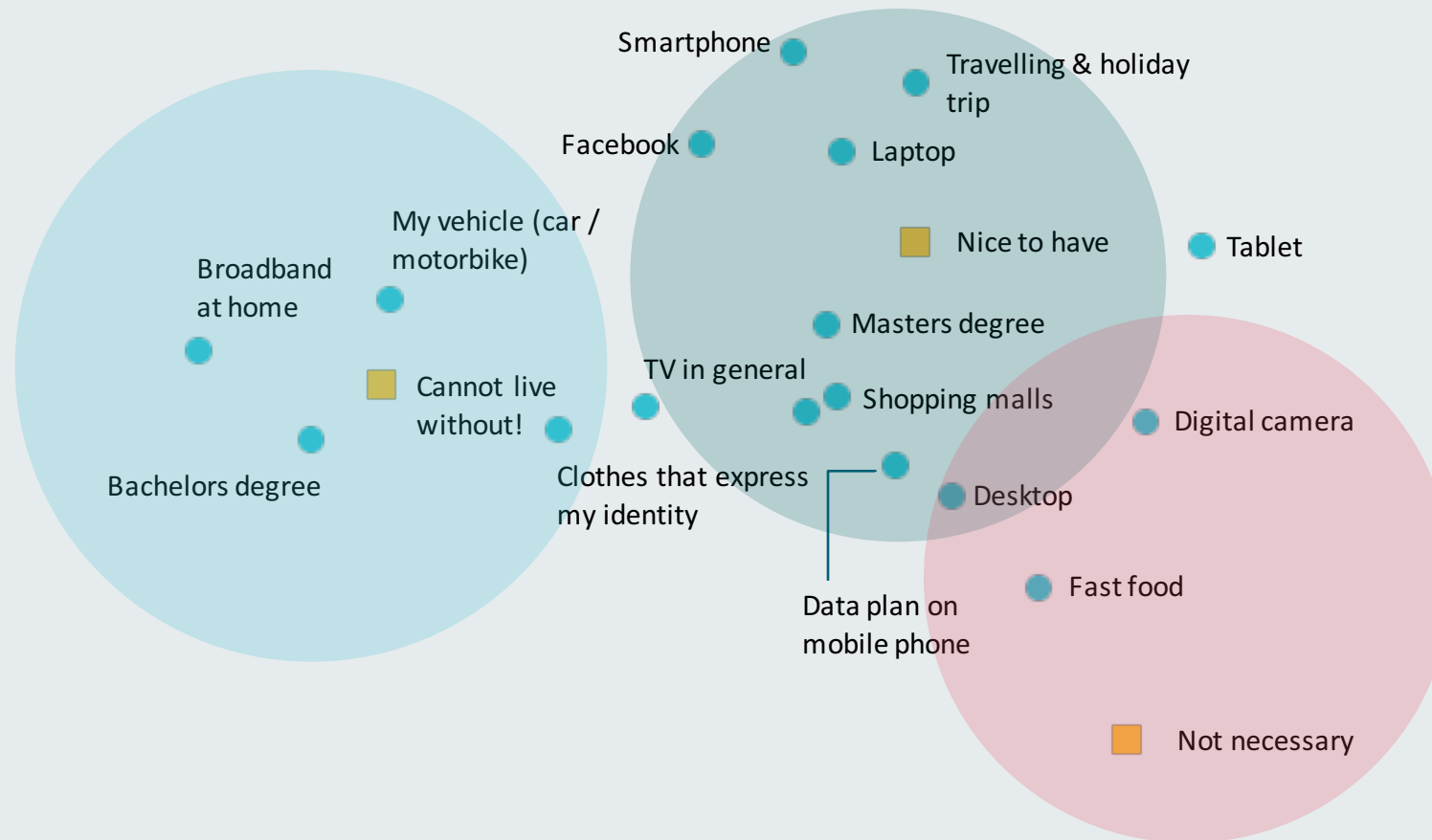


Genzilla roar is heard

Q8: How involved are you in the purchase decision for each of the items below?

n=710

Genzilla's survival kit



Q16: When it comes to what's important to you, please classify the following products and services by "can't live without", "nice to have" and "do not need"

(n=710)

Smart and always in the know

WITH INFORMATION AT THEIR FINGERTIPS, COUPLED WITH A DESIRE TO LEARN AND ADVANCE THEIR EDUCATION, IT'S LIKELY THAT GEN Z WILL BE THE MOST KNOWLEDGEABLE GENERATION WE HAVE EVER COME ACROSS.

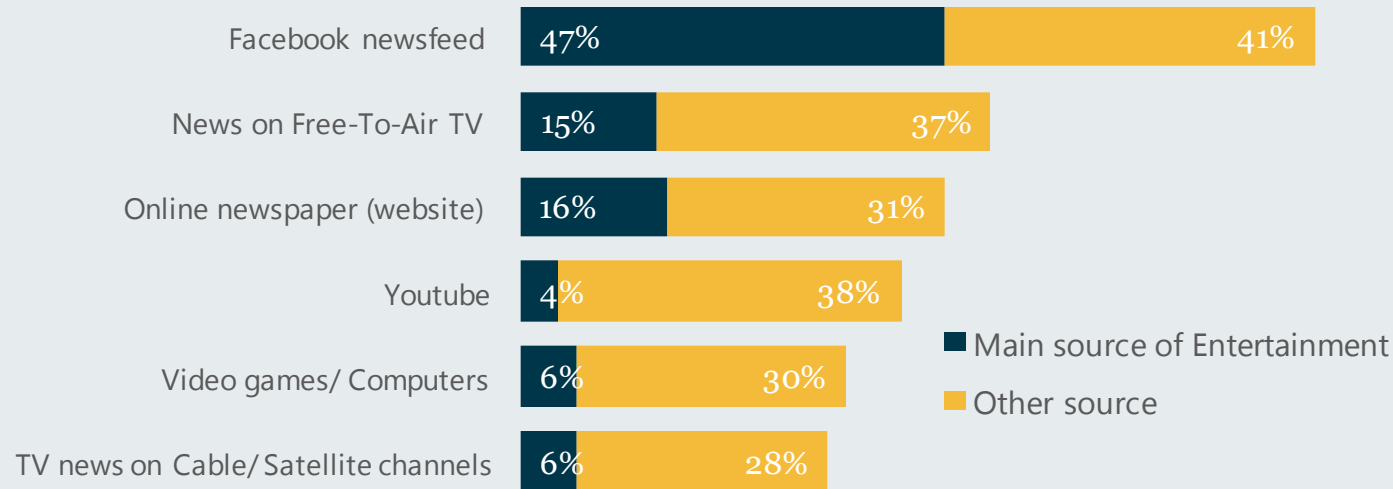


GenZilla would be
extinct without the
internet



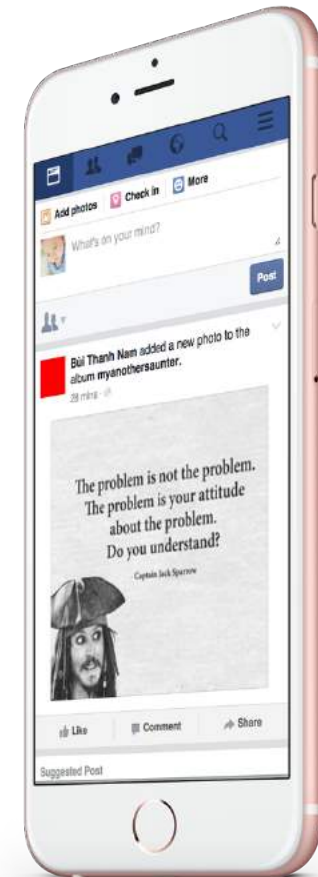
Facebook as main source for entertainment/ news.

Sources used for entertainment (%)



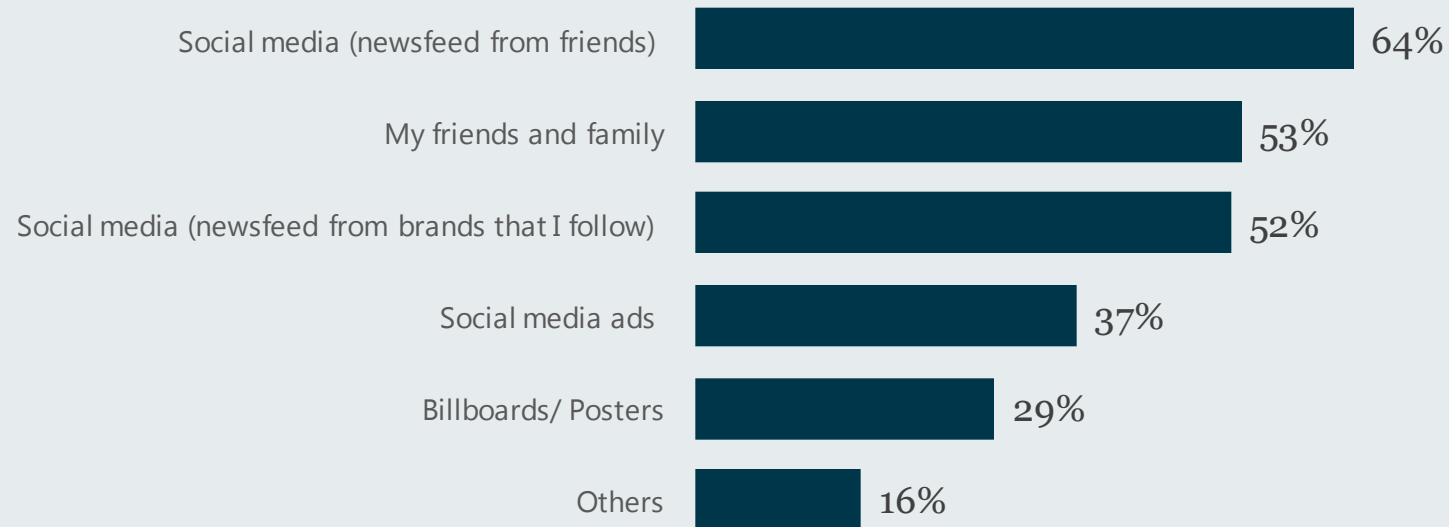
Q11A & B: Which of the following types of media are your main sources for entertainment? Please select one main source and other sources

n = 710



Source of brand information

Sources used for entertainment (%)



Q14: Where do you normally get your brand or product information from? You may select all that apply.

n=710



Genzilla thirsts for video content



52%

WATCH YOUTUBE



41%

WATCH OTHER DRAMA/
MOVIE WEBSITE



31%

WATCH OFFLINE TV



29%

WATCH ONLINE TV

The key is **content**, not platform

We must remember that Gen Z seeks **content** and not the platform. The key to success is being where they enjoy the content; whether that's online or offline. If content shifts, so does platform

A close-up portrait of Dick Wolf, an older man with a grey beard and mustache, wearing a dark suit jacket. He is looking slightly to the right with a thoughtful expression.

"AND THE CONSUMER
DOESN'T CARE. THEY DON'T
WATCH NETWORKS, THEY
WATCH TV SHOWS"

- DICK WOLF

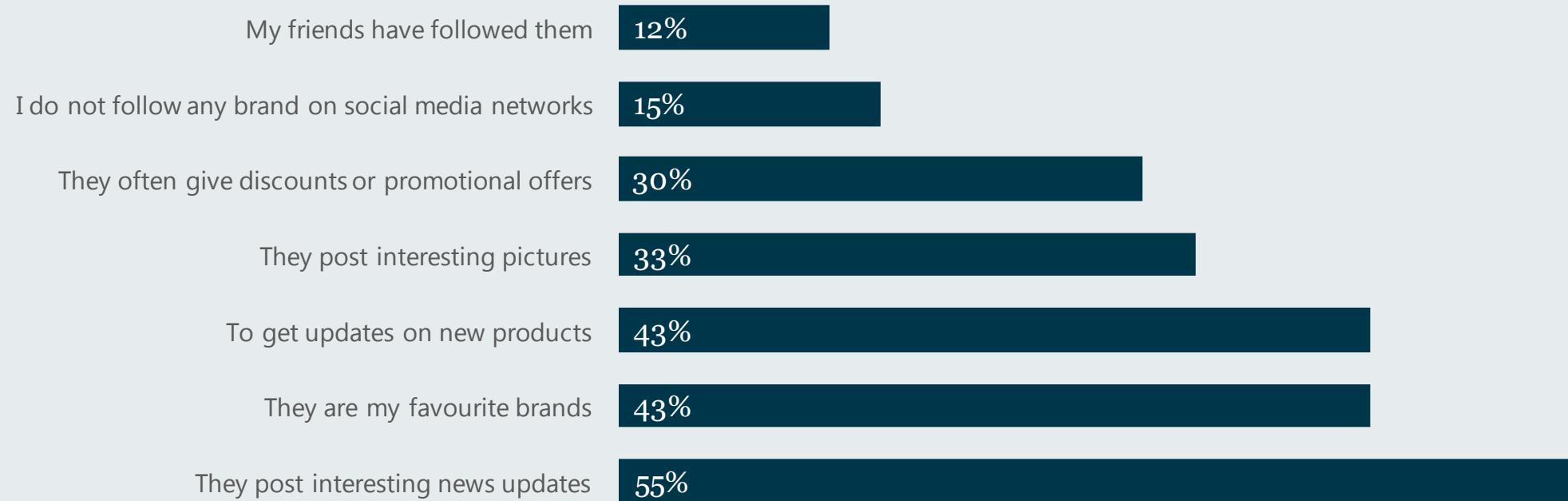
Devour content

WE DON'T HAVE 30 SECONDS TO BE INTERRUPTED

But we have 30 minutes to
have a great story



Why does Genzilla follow brands on social media



Q.25: Why do you follow fan pages of brands

n=710

88%

WILL JOIN ACTIVITIES THAT LET THEM HAVE FUN WITH FRIENDS
(AND LATER ON THEY HAVE PHOTOS TO POST AS WELL)



Genzilla summary

DIGITALLY POPULAR, PHYSICALLY
AWKWARD

MOBILE IS A MUST

DIGITAL RESPONSIBLE

SOCIAL CONSCIOUS

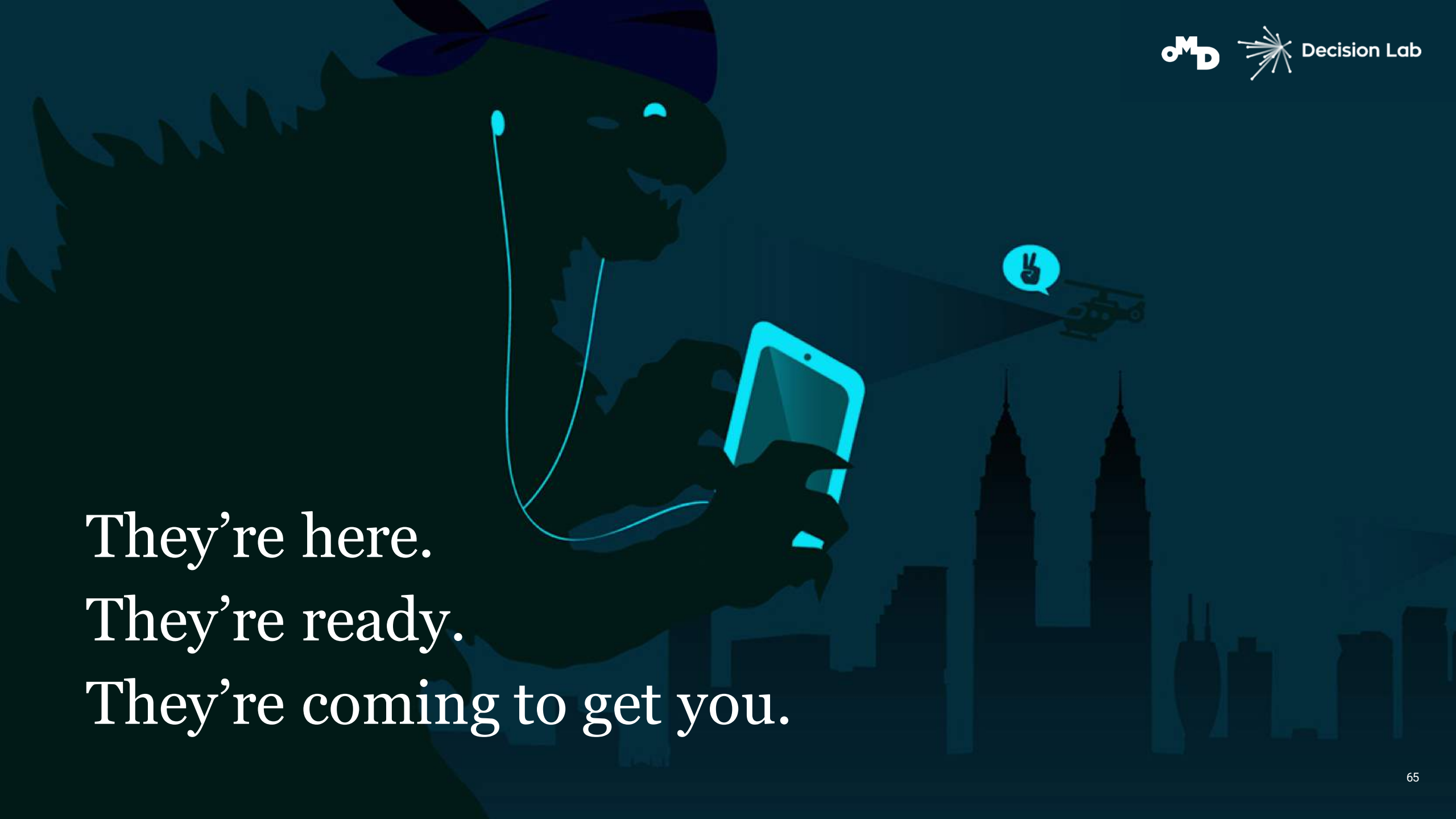
OVER – PARENTED

SMART AND IN THE KNOW

CONTENT FOLLOWERS

Capture Genzilla

| | | |
|------------------------------|---|--------------------------------------|
| Gen Z as a secondary target | Serve a higher purpose | Combine the fun factors to campaigns |
| Simple, bite – size messages | Don't oversell | Storified messages |
| Visually rich media | Review source and presentation of information on social | Follow the content |



They're here.
They're ready.
They're coming to get you.