

UNLOCKING GEN Z 2024

CHINA FOCUS



A MULTI-DIMENSIONAL GENERATION

A MULTI-DIMENSIONAL GENERATION

WITH A DRIVE FOR EXPERIENCE IN VIRTUAL AND IRL SPACES; BALANCING A CHANGEABLE SENSE OF SELF, COMMUNITY, FLUIDITY & AUTHENTICITY.



2023 saw the rise of Gen Z as the most populous generation, representing 32.1% of the population in China and taking over the consumer market. In the wake of the pandemic, Gen Z has experienced a transformation in their consumption mindset and behavior. As marketers, how can they adapt to connect with this dynamic demographic?

Unlocking Gen Z 2024: A Multi-Dimensional Generation, written by dentsu Z our Gen Z specialists, curates the latest ideas and experiences from the Gen Z community and presents them in a whitepaper to inspire the market.

The report explores how the youth of today are opting for a 45° lifestyle, with many people deciding to either career-driven or take a break. Striking a harmonious balance between personal satisfaction and career aspirations, Gen Z are prioritizing spiritual growth as a practical solution for the future. From their perspective, when short on time and funds, a budget-friendly train journey and a joyful day offers a refreshing breather from everyday.

It is examples such as this that illustrates Gen Z resilience, that despite facing challenges, this generation has managed to find balance and inner strength through self-discovery.

To tap into the future market potential, it is imperative for brands to establish a meaningful emotional connection with Gen Z. To effectively target the new generation, they must first understand and empathize with Gen Z's living environment and their distinct culture and needs.

Combining a diverse team of creative Zoomers and a deep understanding of consumer behavior, dentsu Z has identified and explored six key trends - culture, entertainment, technology, emotions, socialization, and consumption. Marketers and the younger generation can both benefit from the direct insights in this report, making it a valuable creative tool.

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Gen Z's culture is an even greater reflection of the past. As the pandemic has gone, a feeling of nostalgia has arisen; they have brought back cultural trends from long ago, using traditional Chinese culture, local customs, youthful imagination, and retro elements to create a world that is enriched with a steady and authentic feeling of joy from former recollections.

HONORING TRADITIONAL CHINESE TRENDS

Gen Z, connected by a shared heritage, embrace the traditional culture and champion their cultural identity.

HONOR THE TRADITIONS

Young people are increasingly aware of the value of traditional Chinese culture. Practices like Baduanjin qigong, the ancient divination text Zhouyi, and Chinese medicine have regained popularity. On the video-sharing platform Bilibili, Baduanjin teaching videos have earned 13.36 million views. Changsha University of Science and Technology, among other universities, offers Zhouyi Bagua as an elective that has seen a large number of students sign up.

CULTURAL WATERMARKS

The young generation has a stronger awareness of cultural copyright protection. A luxury house's horse-faced dress controversy once sparked 730 million views on Weibo. Young people even initiated a worldwide promotion of cultural belonging, taking the lead in safeguarding cultural heritage, when the horse-faced dress emerged as a popular graduation outfit.

NEW CHINESE AESTHETICS

Blended with traditional Chinese elements and interpreted by modern arts, the new Chinese aesthetic is back on the rise. Clocking in at over 100 million views and a top rating of 9.5 on Douban, the Chinese animation Yao-Chinese Folktales speaks volumes about the younger generation's fascination with the culturally rich Chinese style. In addition, the dance drama Only This Green, inspired by Chinese traditional aesthetics, has also drawn their focus. On Little Red Book, posts related to 'new Chinese style' totaled 8.33 million, with Chinese decoration, dress, and makeup setting the new fashion trend, while Taobao witnessed an increase of 380% or more in searches for 'new Chinese style' in 2022.



THE ULTIMATE AESTHETICS

Gen Z's fondness for cheesy content is not a degradation of beauty, but rather a loving embrace of unfiltered genuineness.



LOCAL CULTURE CRAZE

Young people's love for cheesy entertainment is rooted in the authentic local culture and its distinctive geographical features and local community vibes. With their 'Yunnan Rap' style, content creators from Yunnan province have become a hit with a young crowd, leading to a 900% rise in monthly searches for their value-added T-shirts and figures on Taobao.

RETRO CONTENTS

'Old fashioned' content that was stylistically simple and had an 'educational' bias was once the favorite of the older generation, but now nostalgic youth culture has made it trendy. The popular music duo Phoenix Legend, once considered unfashionable, now has 42% of their fans under the age of 30. The Coconut Palm brand, well-known for its distinctive cheesy brand style, also attracted the attention of the younger crowd, obtaining 370,000 followers in just 10 livestreams.

UGLY AESTHETICS

Choosing to be distinctively unattractive is better than conforming to conventional beauty, as young people are often fascinated by unconventional and strong yet seemingly unattractive aesthetics. Taobao's 'Ugly Stuff of the Year Contest 2023' was hyped up by 5 million users, while the number of people who searched for 'ugly stuff' increased by 900%. The least attractive things bring the simplest joy to young people.

CHEESY VIRAL CONTENT GOING GLOBAL

Funny elements of cheesy cultural content have a powerful impact that can go viral across communities and even beyond borders. The Hand Dance Challenge on TikTok attracted overseas Chinese students from around the world to join in, garnering 530 million views. To the surprise of many, the Chinese internet song 'My Surname is Shi' was used as the background music in over 1 million TikTok videos of people dancing around the world. '123 Slip Away' is like a mysterious oriental spell that has also entranced the western beauty industry.

THE 20-YEAR-OLD KID

In the face of mounting societal pressures, young adults in their 20s seek to recapture the simplicity of childhood, rebuild their sense of inner security, and embrace a Y2K style for a more joyful persona.

TOY SHOPPERS

Despite seeming too basic for some kids, Gen Z found enjoyment in toys. Roughly 25% of toy sales in 2022 were attributed to the 19-29 age group. In every toy collaboration, KFC has experienced a rapid sell-out of their kids' meals. Furthermore, Hide-and-seek and hopscotch, the classic childhood games, have become a favorite among young people. The 'GPS shared hide-and-seek' video on Bilibili raked in 7.73 million views and resulted in many recreations.

CHILDHOOD HEROES RETURN

Animation and TV show characters, like Ultraman and Big Ears Tutu, which were much loved by Gen Z in their childhood, reclaimed its title as the most adored. The animation Pleasant Goat and Big Big Wolf's co-branded milk tea saw a successful pre-sale, with 110,000 cups sold in just two days. The GG Bond animated series has garnered more than 140,000 social posts on the Little Red Book platform. These characters not only bring back a wave of nostalgia for many, but their audiences' perspectives and understanding have shifted as they have grown older and gained more life experience. Take Squidward, for instance; while considered irritating by many, young people see him as a revolutionary at work against involution. The reinterpretation of classic characters has brought them joy and is a reflection of the young people's life perspective.

Y2K VIBES

Trying to forget the economic recession and the pandemic's struggles, young people are imitating the fashion of the millennial era and the positivity that the Y2K style stands for. Opting for vivid, intensely bright tones of candy colors, they convey their mood and break away from the reality and ordinary. 'Dopamine' and 'Y2K' have sparked 4.6 million conversations on Little Red Book, with a remarkable 1 billion views recorded. The K-pop group NewJeans, with its signature 'Y2K' style, also has amassed a huge fan base of hundreds of millions worldwide.



THE TYPE PSYCHICAL

Post-COVID, the dominant factor influencing Gen Z's actions is their emotions, much like the rest of the population. Having overcome their inner conflicts, they have left behind their illusions and begun to scrutinize the world with a more astute perspective. Inside, they delve for their most heartfelt reactions, and outwardly, they demonstrate their most fearless responses.



TREND 02

MENTAL

APPRECIATION OF THE UNREMARKABLE

Rising above the culture of competition, Gen Z embrace the concept of leading a normal life - neither 'lying flat' nor striving to be the best, but rather living a simple, content life and appreciating the joys of everyday living.

FIND A STABLE JOB

With unemployment rates on the rise, graduates are turning to the civil service as a means of securing a stable job. In 2023, the number of applicants hit its peak for the last 10 years, with 40 people competing for 1 position, with many still preparing for the entry exam despite having a job.

ACADEMIC CREDENTIALS VALUED AT 3K

Acknowledging the fact that academic credentials do not guarantee success in life, young people are prioritizing developing practical skills and gaining hands-on experience. An increasing number of young people are turning to entry-level positions, like housekeeping and security roles, that do not require certification. For Gen Z, a 3K monthly salary is seen as a mockery in terms of their financial status. A Bilibili video, which gained 5 million views, showcased a person who saved only 5000 yuan in 5 years since graduating, and another person who held a Master's degree from a top college but was employed as a cleaner in a hot pot restaurant.

SIDELINE GOLD DIGGERS

Statistics show 40% of Gen Z are engaged in multiple side hustles. Unlike slash youths who pursue a balanced life with hobbies, the only thing Gen Z cares about is earning money. Those 'gold diggers' not only invest in their passions, like beading and calligraphy, through small-scale business, but also tap into more profitable ventures like running street stalls and selling sausages. The 'Summer Gold Rush' released by Alibaba's secondhand trading app Xianyu shows some fun sidelines, such as photo shooting at comic exhibitions and music festivals, shared stalls at night markets, and some people even hired to act as the bad guys for pet sterilization and more.

FULL-TIME ADULT CHILD

Some people have discovered a new lifestyle when not earning money. In exchange for financial support, 'adult children' living with their parents full-time offer labor, while continuing their studies towards a career. With a youth unemployment rate as high as 20%, they have had to make compromises in life.

ESCAPE IS SHAMEFUL BUT USEFUL



In a world where the climate crisis, global pandemics, inflation, and artificial intelligence are ever-present, today's youth are seeking ways to escape the reality.

UNLOCK THE WILD SELF

Unable to secure a satisfactory job, Gen Z also struggle to understand the significance of work and envision a hopeful future. As a result, they resort to humorous ways to convey the underlying stress they face in their lives. As seen in KFC's Crazy Thursday promotion, young people have embraced it as a new cultural phenomenon, using it as a platform to unleash their creativity and escape the monotony of the working week.

RETIRING YOUNG

Upon graduating, the younger generation often jokingly state that they are growing old fast and wish to retire sooner. Over 300,000 young individuals have gathered to FIRE (abbr. Financial Independence, Retirement Early) community of the Douban platform. Their strategy for getting to FIRE entails reducing materialistic wants, living a pared down lifestyle, swiftly saving up 25 times their yearly living costs, and covering their daily expenses with 4% of their wealth management earnings. To add to this, several people began to embrace the lifestyle of the elderly and early retirement. Worry beads, gardening, and rotating the walnut are becoming the new pastimes. During the period from 2021 to 2022, the percentage of young eCommerce users who purchased cultural playthings grew from 10% to 21%.

FATE IN THE HANDS OF METAPHYSICS

When feeling confused, insecure, and curious about the future, the youth turns to metaphysics for answers and comfort through rituals like worship, sharing lucky content, and fortune-telling. Temple ticket sales have boomed since March 2023, with a remarkable 367% growth. Notably, Yong He Gong and Zhoushan Putuo have seen over 5 and 4 times increase in sales. The daily average search index for tarot cards on Baidu has experienced a remarkable 759% boost, reaching 237,591 in 2023. Tarot-themed discussions on Weibo reached a total of 1 billion views.

VENTURE INTO FARMING

Today's youth not only find pleasure in viewing farming videos, but they are also embracing agriculture and becoming farmers themselves. Become A Farmer, a variety show that highlights the farming experiences of youth has inspired many to pursue a life in the countryside. The show attracted a massive 13 billion views on its Weibo page and scored an impressive rating of 9.0 on Douban. At present, a total of 16 million new farmers (post 95) running stores on Pinduoduo, representing over 49% of the agriculturally engaged owners on this eCommerce platform.

MAKE THE DAY MATTER



Delayed gratification is a fallacy; the young generation appears to favor the present over the future, valuing joy and exhilaration more than anything else.

TRAIN GETAWAY

Spontaneous travel has become increasingly popular among college students. "Join us on a train ride to Lhasa and celebrate our youthful spirit!" This powerful slogan has motivated countless college students to take a cost-effective escape from the hardships of life. 2023 has witnessed a rise in train travel among college students on weekends, turning some small cities into bustling tourist hubs. Zibo, for instance, rose to fame as a popular BBQ spot throughout China, with its related short videos amassing 180 million views. The 2023 Youth's Travel Report reveals that a remarkable 71.1% of young adults had secured their travel plans by the start of 2023. On average, they anticipate making 3 trips that will last 17 days each.

AGAINST THE SOCIAL CLOCK

The younger generation is not bound by a specific timeframe to achieve their goals. Age and timing restrictions are insignificant to them when it comes to reaching their desired outcomes. Over 80,000 young individuals have come together on the Douban platform through the Against the Social Clock community, embracing self-fulfillment without being held back by age or timing. While some opted for retirement at 17 or a gap year, there were also those who chose to return to high school at 23. Furthermore, the younger generation is frequently observed challenging traditional social norms. Gen Z seemed to favor nighttime activities, as revealed by the iiMedia survey, with 45% engaging in exercise and fitness, 30% opting for the bookstore, and 15% attending music festivals. The idea of living in the moment has increased the number of occasions for consuming.

PLANNING AHEAD

As young adults navigate the ups and downs of daily life, some are opting to plan their own funeral arrangements, finding comfort in having some measure of control. During the pandemic, the China Will registration Center rolled out a messaging service called Happy Message, which had amassed a total of 80,000 wills by the end of 2021. 33.30% of those who wrote wills were in the 20-30 year old age group. Over one million Weibo users are currently sharing their thoughts on what they want for their funeral.

A person wearing a VR headset is the central focus, set against a background of red and blue light. Large, bold, cyan text is overlaid on the image. The text is partially obscured by horizontal black bars. The overall aesthetic is futuristic and tech-oriented.

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TECHNI

IOLOGY

Artificial Intelligence has been a game-changing force for the lifestyle of Gen Z. As Gen Z moves towards more modern production systems and dives deeper into the world of technology, they must also navigate a new conflict between humans and machines. Acknowledging the significance of the new tech code in the lives of young people is essential for brands to effectively reach and engage with them.

EMBRACING AI

Digital natives have shown a positive response to AI technologies. Even though half of the population admits AI technology can be anxiety-provoking, they continue to embrace it as a constructive force. 78% of Gen Z expressed a favorable outlook towards products and services powered by AI. Simultaneously, they are increasingly open to using AI-powered devices. Qualcomm utilized generative AI models on phones equipped with the Snapdragon 8 Gen 2 mobile platform for the first time in 2023. With the integration of AI models, Huawei's HarmonyOS 4 offers a seamless and user-friendly experience that appeals to the young generation.

AIGC FRONT-RUNNER

Gen Z's influence in the AI revolution is evident with over ten million views on Bilibili for videos featuring ChatGPT, Midjourney, and other AIGC technologies. AI technology has become a valuable tool for bloggers and artists on social platforms like Douyin, Bilibili, and Little Red Book. This empowers them to create content for their professional practices, academic duties, and side endeavors such as AI avatar generation, AI emoji design, and AI copywriting. The Young People's Ideal Profession Report revealed that more than half of young people have a strong desire to pursue a career in AI and technology.

RECONSTRUCTING THE WORLD OF ENTERTAINMENT

As the frontrunners of AI innovation, Gen Z also uses AI to redefine the way they experience entertainment. The AI renaissance and anthropomorphic interactions are at the forefront, as seen through the success of singer Stefanie Sun Yanzi's AI-rendered performances, which have garnered over 10 million views on Bilibili. AI-driven characters in Justice Online, a highly anticipated game, proved to be a major draw for the public beta test, with one million players jumping in within 10 minutes and contributing to a total revenue of US\$3.6 million in two days. As artificial intelligence continues to develop, Gen Z are now able to have a more realistic interactive experiences with Non-Player Characters in video games, allowing them to create meaningful connections with NPCs, from friendship to even love.

GEN

AI

A stylized, glowing orange and red hand holding a glowing orange and red 'ai' logo. The hand is rendered in a futuristic, wireframe-like style with a bright orange and red glow. The 'ai' logo is also in a similar style, with a bright orange and red glow. The background is a dark purple gradient.

As we move into 2024 and beyond, Gen Z will continue to be at the forefront of digital trends and will help transform Gen AI through a natural ability to keep up with the ever-evolving realm of artificial intelligence.

LIFE IN CODES

Digital coding has opened the doors to a smarter way of living for Gen Z.



HEALTH DASHBOARD

The physical well-being of young people has become a top concern in the wake of the pandemic. For many, smart bracelets and watches have become a vital part of their daily routine, acting as 'organs' that provide a convenient dashboard for tracking their health. Awake or asleep, young people monitor their new organs to track their vital signs. Apparently, they are gradually mastering the art of living with their new organs. By 2025, it is estimated that China's smart wearable device market will grow to 111 billion yuan, fueled by the tech-savvy Gen Z demographic.

MAGIC HOUSEKEEPER

The allure of 'black magic' at Hogwarts has captivated Gen Z since they were young, and now they are incorporating 'black technology' into their own living spaces. Today's Gen Z is on the lookout for sophisticated home appliances that boast the latest technology, enabling them to change their living spaces with a simple command, almost like magic. Home 'magic' has also become a hot topic on Little Red Book and Bilibili, sparking millions of conversations. As of February 2023, Xiaomi's smart home APP had a total of 66.86 million active users, as more and more Zoomers welcomed the magic housekeeper into their households. The year 2024 is projected to see China's smart home market generate over 530 billion yuan in sales, driven by the post-pandemic revival and the enforcement of policies and incentives.

BOUNDLESS CONTROL

The latest technology and advanced features of devices are keeping Gen Z entertained and engaged. For instance, the Apple Watch utilizes finger muscle movements for control; special effects triggered by gestures have been introduced by Apple, WeChat, and Feishu; and Ihjoo Yoon's mouse rings are also notable. Young people expect operating systems that operates without external controls, and instead can be completely controlled by the human body.

DIGITAL SOCIALIZATION

Ever-evolving technologies coupled with the variety of online socializing options have presented Gen Z with platforms to gather, interact, reclaim community identity, and make connections. Gen Z has adopted a new approach to fulfilling their psychological and emotional needs by engaging in activities within the comfort of their own homes. Statistics reveal that 83.6% of Gen Z users are socially active, with a considerable 70% in China showing a strong desire to broaden their social connections through digital platforms.

ENLARGED WORLD VIEW



The evolution of the metaverse has liberated Gen Z from physical boundaries, blurring the lines between reality and the virtual realm and expanding their perception of the world.

IMMERSION IN THE META ARENA

The metaverse has opened the door for brands to have meaningful interactions with Gen Z, leading to a fun and enriching experiences that drive commercial success. KFC's virtual store on Super QQ Show was met with an overwhelmingly positive reaction from the younger crowd; and Soul, the social App with 100 million young Chinese users, built a metaverse landscape in 2023 to accommodate the upgraded social needs of Gen Z.

VIRTUAL AVATAR EVOLUTION

The market size for China's virtual avatar industry is predicted to hit 640 billion yuan, with a core market size of 48 billion yuan by the year 2025. AIGC tech-based digital avatar businesses, including virtual idols, virtual anchors and virtual teachers, are on the rise. Today, artificial intelligence algorithms are extensively utilized to generate content and products. AIGC and other cutting-edge technologies are opening doors for virtual avatars to evolve and improve, allowing them to develop and expand their human-like interaction skills and specialized knowledge.

THE BOND IN THE DIGITAL SPACE

Growing up in a time of uncertainty, Gen Z often find themselves struggling with loneliness, anxiety, and helplessness. In turn, online relationships can be a trustworthy source of support for them. The number of downloads for AI lover-related apps soared during the pandemic, with a monthly average of 500,000. Companies such as Microsoft, Google, and Tencent have poured hundreds of millions of dollars into the companion AI market. Snapchat disclosed that their chatbot had already managed 10 billion messages between virtual partners and 150 million users within the first two months of its debut.

EMBRACE THE WORLD FROM HOME

For those who enjoy the indoors, advanced 3D spatial hardware such as the Apple Vision Pro will provide a whole new level of entertainment and visual pleasure. Without ever leaving their own homes, people can engage in immersive remote work settings, theater-inspired experiences, or other forms of entertainment. While commonly used for niche entertainment, 3D projections have now become a go-to choice for young people in a range of situations, making it a hit in 2024. Through revolutionary projection technology, the sound and images in the real world are just as lifelike as what the naked eye perceives. Consumers can now enjoy the most immersive sensory experience ever, thanks to the redefined boundaries of sensory entertainment. For instance, the Las Vegas Sphere's immersive movie experience has been a hit among the younger crowd.

ENTER



TREND 04

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MENT

TRID

The entertainment world is being characterized by young people's ability to seamlessly integrate diverse forms of entertainment and cultural traditions. Gen Z aims to break the barriers across communities and bring people together to create moments of joy for all.

NEW BOUNDARIES FOR GAMING

China's gaming market saw a surge in growth thanks to the implementation of new policies, resulting in a greater selection of games to cater to Gen Z's tastes. The spotlight was on both ACGN and games designed for female players, with traditional Chinese elements also gaining popularity among Gen Z.

ACGN GAMING: A YEAR OF CELEBRATION

ACGN gaming experienced a boom in 2023. The number of ACGN games introduced in the first eight months of this year nearly tripled compared to the same time last year, according to public data. Additionally, ACGN gaming took up nearly half of the new mobile game market in September. The exceptional attributes within ACGN gaming make it a more enticing option for users who are willing to pay; the user's emotional bond with a character plays a crucial role in determining their value when spending money. While playing, the character's development is often restricted, but there are no boundaries when it comes to buying additional products outside of the game. Take miHoYo, a major player in the gaming sector, whose blockbuster game Genshin Impact is believed to have made a minimum of 150 million yuan in revenue. Additionally, Honkai: Star Rail and Reverse: 1999 have both proven to be highly profitable hits.



THE RISE OF GAMES FOR WOMEN

The popularity of games created specifically for women is soaring, as evidenced by the fact that almost half (48.6%) of mobile game users in China are female. The industry has grown to a scale of 85 billion. Otome games, such as Tears of Themis and Mr. Love: Queen's Choice by miHoYo and Papergames respectively, as well as For All Time by NetEase, are always in high demand and have previously quickly sold out during their collaborations with different brands. Tencent's Light and Night, the main player in the Otome games, made a whopping 6.8 million yuan on the Chinese Valentine's Day of 2022 through the App Store. Otome game players are known for their unwavering devotion to their favorite characters, even if it means investing in a love that can only exist in the virtual world. In addition, simulation mobile games like Cooking Madness, Cooking Fever have become new hits. The videos featuring gaming contents from Airplane Chefs garnered 340 million views on Douyin, showcasing the dual lives of Chinese youngsters - working in offices during the day and 'serving' desserts on their phones at night.

TRADITIONAL CHINESE-INSPIRED GAMES

The past few years have seen a significant rise in the success of Chinese games, with their production quality reaching global standards. Additionally, games have become a crucial medium for showcasing traditional Chinese culture and promoting it worldwide, thanks to the efforts of major gaming companies. Through its modern and youthful approach, the Chinese gaming world attracts Gen Z and promotes a strong sense of national identity. Based on the well-known Chinese novel Journey to the West, Black Myth: Wukong's debut teaser trailer made its mark at number 7 on IGN's recent five-year video ranking. The live demonstration video of the game, released in 2023, made it to the 23rd spot on YouTube's hot list, earning it the playful nickname of a 'nuclear test' for Chinese game companies by Gen Z players. Genshin, another Chinese creation, has skillfully integrated Peking Opera and traditional Chinese opera elements into its game design, bringing the character Yun Jin to life. The release of the promotional video for The Divine Damsel of Devastation propelled it to the number one spot on Bilibili's hot list, garnering 30 million views. Its popularity extended beyond borders and filled Chinese youth with a sense of pride.

ACGN: THE UNSTOPPABLE FORCE

HOME PARTY TO ACGN

The year 2023 saw the rise of ACGN culture becoming commercialised, with Shanghai COMICUP29 expo attracting over 300,000 anime fans and creators. ChinaJoy, Bilibili World, and other prominent offline exhibitions also put on an impressive show for fans of ACGN. Moreover, Gen Z tend to buy 'goods' (ACGN value-added merchandises), giving rise to the goods community where they have even created guidebooks for all physical 'goods' stores. Meanwhile, several anime 'goods' shopping hubs have been introduced in Shanghai, Guangzhou, and Beijing. Bailian ZX, a popular spot among ACGN lovers, experienced a surge of 75,000 visitors and earned 25 million yuan in revenue on the peak day of the Labor Day holiday.

ANIME GENRES MATTER

Known for their captivating blend of magic, fantasy, humor, and a touch of sci-fi and romance, Japanese manga has maintained its popularity over the years. Its strict grading system and diverse storylines have also contributed to an increase in the market for value-added products. Among the beloved series of Gen Z's childhood are Astro Boy and Detective Conan, as well as long-standing fan favorites like Gundam and Jujutsu Kaisen. And don't miss out on the latest buzz-worthy releases of 2023: Oshi no Ko, Blue Lock, and Frieren: Beyond Journey's End. On the other hand, Chinese anime has shifted its focus to 3D comics inspired by metaphysical fantasy, leading to a challenging landscape for smaller, but well-crafted works. Despite the limited genres available in the local anime market, Soul Land and Battle Through the Heavens stand out as popular and successful titles.

OLD & POPULAR

The younger crowd is still into the classics. Over the past six decades, kickstarted by Toei Animation, the Japanese manga industry has evolved into a thriving market with a wealth of beloved content. For Gen Z, iconic anime titles like Pokémon, One Piece, Detective Conan, Cardcaptor Sakura, and Neon Genesis Evangelion are key gateways into the world of anime. Today, the classics have a significant impact on driving both buzz and sales. The consistent release of sequels for titles such as Attack on Titan, Demon Slayer: Kimetsu no Yaiba, and Spy × Family have made them a hit among Gen Z. The collaboration between Luckin Coffee and JoJo's Bizarre Adventure saw an impressive 131 million cups sold, raking in 26 million in sales. The inclusion of anime character 'psyduck' in KFC's Children's Day combo meal promotion sparked a frenzy, with 2.76 million Douyin searches and a significant 35% interest from the Gen Z demographic. The fusion of popular animes and brands has proven to be a successful strategy for capturing the attention of young consumers.

ACGN, once a niche culture, has now become a mainstream phenomenon, winning over young people.



THE HYPER-EVOLVED SPORTS



The popularity of eSports, the flourishing sports market, and the integration of mass sports into our daily lives have all contributed to the increased importance of sports. The upcoming 2024 Olympics will further accelerate the continual evolution of the sports sector, inspiring sportsmanship and pushing its boundaries.

ATHLETES TAKE THE SPOTLIGHT

Gen Z has turned their attention from popstars to sports stars. The Olympic Games, Asian Games, and Winter Olympics have sparked a craze for sports nationwide, while Gen Z has channeled their passion for idols into enthusiastically supporting their adored athletes. Data shows that the majority of young individuals (86.7%) have a favorite sports figure. Gen Z has not only fallen for their remarkable athletic skills, but also for their charming personalities and attractive appearances, making them passionate about these sports stars and their sport. Besides, the athletic competitions have become a stage for displaying skill and making celebrities. Thanks to her participation in the FISU World University Games, athlete Wu Yanni's short video accounts attracted a significant following, landing her on magazine covers and securing her as a brand spokesperson. At the Asian Games, Swimmer Wang Shun's impressive build made him a favorite even among Korean fans, generating numerous discussions about him.

THE WAVE OF ESPORTS

For Gen Z, eSports is the go-to sport. The number of eSports enthusiasts in China soared to 504 million by 2022, with a significant majority (78.7%) falling under the age of 30. This underscores the role of youth in the world of eSports. Beyond participating, eSports also offers the thrill through observing others' battles for many, without the need for hands-on involvement, techniques, or equipment. Statistics indicate that the audience for eSports has exceeded the number of devoted players. Notably, the eSports community in China shows a high propensity for spending, with 87% of its users have made eSports-related purchases within the last year. eSports enthusiasts purchase virtual items and attend in-person events to enhance their participation, as well as invest in value-added products for their favorite characters or players.

VILLAGE SUPER

Traditional sports like football and basketball competitions have become popular in small villages as they fully involve the local people and culture, making the game not something that is only exclusive to urban people/communities. The Village Super events saw a record-breaking 98 matches that has drawn in a packed crowd onsite and generated over ten billion views across multiple platforms, ultimately attracting over 3 million tourists to the village. With the immense support from the community, the Village Super has made football an inclusive game for everyone, with players aged 12 to 50 participating. As elementary students kick off their football training, college students are making the most of their holiday break by returning home to help with coaching.

FANDOM UNFANCIED

The fan community, once shrouded in mystery within pop culture, is now expanding into new realms and being treated with a more logical approach by Gen Z.

ABILITY COMES FIRST

As scandals continue to emerge and their daily earnings as high as 2.08 million yuan, the typical Chinese popstar's popularity is waning. In today's culture, fans pick idols for their abilities, not just their looks, and fans use the idols' performance records to demonstrate their love and support. The widespread belief that Chinese entertainment is coming to an end is actually a rebellion against the control of capital and dissatisfaction with subpar celebrities. For instance, Wei Daxun, the lead actor of a hit drama, made headlines for his incredible four-hour performance, known as the 'Daxun Incident'. A survey reveals that half of Chinese supporters are driven by their celebrity's exceptional work quality.

REAL'S TRIUMPH

Forget about traffic, focus on creating engaging and meaningful content that can break through the noise. Reality shows like Go for Happiness, Become a Farmer, and Joyful Grown-ups may not feature big-name stars, but their genuine content has captured the hearts of viewers. People also have a strong desire to see celebrities in their natural and authentic state. An instance of this would be when actor Wu Lei fearlessly documented his unscripted and unfiltered experience riding through Xinjiang in a vlog, which quickly became a trending topic. The authentic reactions of the film's actors at the premiere of Creation of The Gods I: Kingdom of Storms contributed to its massive box office breakthrough of 2.6 billion.

A BLAST FROM THE PAST

A growing trend in the entertainment world is 'throwback fever', as seen in the popularity of old dramas, variety shows, and memes among younger generation. Despite being initially labeled as outdated, Phoenix Legend has now become the leading musical duo among the youth in the field of music. Nayuki Tea's collaboration with the hit song Fantasy resulted in the sale of 1.46 million cups of their co-branded tea. Super Boy and Super Girl, the beloved talent shows from a decade ago, have been gaining renewed popularity through their entertaining clips. For many years, Empresses in the Palace and My Own Swordsman continue to be highly sought-after TV series, consistently appearing on monthly hot topic lists. Today's generation has also been influenced by nostalgia and memes from years past.

SOCIAL



The zeitgeist of Gen Z is reflected in their character, thoughts, and pursuits. Their desire for uniqueness drives a strong demand for personalized, diverse, and contemporary social experience. Their focus on spiritual fulfillment rather than material gratification has a ripple effect on the behaviors and values of future generations.

TREND 05

DOCUMENTARY

MODERN SOCIAL CULTURE

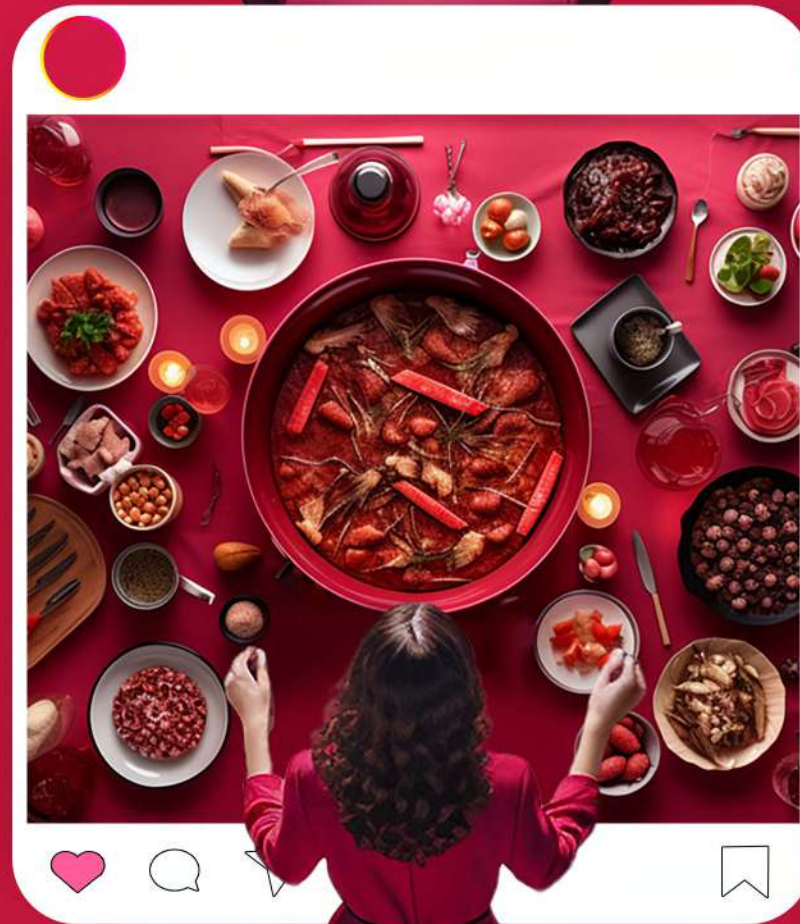
Today's youth: longing for friends and a sense of community, yet detesting the idea of social interaction.

NEW SOCIAL IDENTITY

Gen Z's social identity is defined by their nicknames, personas, MBTI types, and platforms. When they first meet, they immediately exchange their names and ages, but also go a step further by sharing their social identity, including their MBTI, horoscope, and Bazi. These factors even play a role in their job hunting and relationships. Understanding their true nature is of great importance to Gen Z. Through the lens of these social identities, they evaluate and understand themselves and their surroundings, enabling them to connect with a community that best reflects their values. Moreover, Gen Z turn to the internet for diagnostics, where they compare their current situation to that of renowned movie and TV characters, such as Robinson or Su Peisheng.

NEW COMMUNITY IDENTITY

The latest trend for Gen Z is to join 'X-school'. X refers for a community where like-minded young individuals can connect, find a sense of belonging, and even develop their own distinctive ways of speaking and interacting. The first eight months of 2023 saw a total of 48,000 posts mentioning 'Mai Men' (McD-school) on major social platforms, resulting in over 51 million interactions and 36 million likes.



NEW SOCIAL LANGUAGE

The new generation has created a fresh way of interacting, emphasizing a range of speech styles known as digital languages. Amidst the many new languages vying for recognition on popular short-video platforms such as Douyin, Guo and her Guo Language have captured the most attention. While enjoying immense popularity on the internet, Guo's controversial content led to her being blacklisted from all platforms, inciting 870 million discussions. With the end of the Guo language era, a wave of new languages swept in, such as Lan language that mimics English pronunciation to speak Chinese. This has also sparked the growth of internet celebrities who have pushed back against the conventional aesthetic norms.

NEW APPROACHES TO BUILDING SOCIAL CONNECTIONS

The new norm for young people when it comes to socializing is being short and speedy. Prioritize developing meaningful friendships over indulging in unnecessary social engagements. A phenomenon known as Crush Culture has taken over Gen Z, encompassing not just romantic relationships but also anything that can incite love at first sight. The rise of speedy socializing has given way to the concept of Dazi (partner), a new form of friendship centered around mutual interests which bring them together in sincere conversations. Both the #DiningDazi hashtag on Douyin and #GameDazi have achieved impressive numbers, with over 7 billion and 6 billion views respectively. Over 60% of young people have voiced their desire to find a partner, according to a survey.

NEW SOCIAL RELATIONSHIPS

Gen Z has introduced a fresh set of social connections, such as immediate friends, which refer to close friends carefully chosen by oneself. Generally, your immediate friends are part of your core friend group, and can be considered as family without any blood ties. This was first brought up by Mao Buyi, a singer, during a talk show. This has led to the creation of new terms: direct friends refer to childhood friends, while indirect friends refer to those made through mutual acquaintances. Instead of using up energy on initiating a new intimate connection, a growing number of young people are devoting their attention to their existing friendships. This has caused a change in outlook where traditional values of marriage, love, and family are no longer prioritized, and friendships have gained more significance. For some, friends are like family and they share a strong connection with them.

SMALL CAMPUS BIG WORLD

On campus, young people exist in their own unique bubble, where self-made influencers, self-produced content, and self-sustaining communities that could thrive independently from the rest of the world.



THE ORIGIN OF BLOGGERS

The dynamic between Gen Z and the Internet is symbiotic, with Gen Z being the most invested age group on the web. Online platforms have become the go-to destination for young people to showcase their campus life, making it a norm for them to seek attention in this manner. As the trend of blogging as a profession continues to grow, college students are uniquely positioned to excel in the realm of online fame thanks to their digital native status. Look at Zhan I's case, his vlogs featuring campus life have amassed an impressive 1 million followers on bilibili in a just 9 months. The shower fee challenge he started has generated almost 8 million views, attracting large number of college students to join in and share their videos.

CAMPUS REALITY SHOW

College students are able to produce short videos that are not only content-rich and interactive, but also have the potential to leave a lasting impact in a matter of minutes or even seconds. Gen Z is actively involved in producing and filming their own unique variety of programs, from talent competitions to romantic dramas to reality shows. At Communication University of Zhejiang, an in-house girl group named MAGI has amassed a following of 300,000 fans. From producing hit songs and sitcoms to delivering musical performances, college students are playing a role in shaping the future of entertainment. The dormitory fashion week video on Douyin garnered a million likes upon its debut. From *Empresses in the Dormitory* to *Tiny Times in the Dormitory*, the dormitory-themed videos adapted from popular series have become a hit among viewers.

CAMPUS NETWORK

The younger generation on campus has created a digital community of their own. The community they manage on QQ or WeChat has a considerable number of followers, no less than the school's official network, significantly influencing their campus life. In this digital campus, people can easily find solutions for life services, locating others, making confessions, apologising, and trading goods. For most college students, their own sharing and support platform is a more trustworthy source than the information found online. A data survey revealed that the majority of students (81%) have joined their school's love confession community, and 13% have also joined similar communities at other schools.

INVISIBLE NETIZEN

While the internet can offer positive social interactions and easy access to information, it can also lock up people within the walls of big data.

BOT CULTURE

A bot's seemingly meaningless content is oddly appealing to young people. Other than bots for automated tasks, China is home to various categorized bots. Tree Hole bot, for example, serves as a platform for individuals in distress, offering insights and contentment to those seeking answers. In the virtual community, they have created a protected outlet to share content. Weibo's most popular bots, such as Tianxiu bot, Iconic Well-known Moment bot, and The College Students' Roast bot, have each amassed a following of over 10 million fans.

CAMOUFLAGED IN THE DIGITAL WORLD

Today, a large number of internet users disguise their true identities within digital communities, preventing others from recognizing them in person. As big data continues to dominate, private internet space has become scarce, forcing people to seek out ways to safeguard their identities. Big data records 'traces' of our daily routines and penetrates the online space that individuals believe to be confidential. Gen Z, is taking a stand against algorithmic recommendations and the potential threat of privacy breaches while socializing, advocating for stronger anonymization. To shield themselves from media scrutiny and protect their vulnerable core, young individuals choose to go anonymous online.

LEAD THE ALGORITHM

When it comes to distributing 'baby solid food' content and comments, social media platforms' algorithms tend to disregard male users as the primary target audience. It has become popular for female users to then include that hashtag as a filter to prevent men from seeing their content. This showcases the demand for a friendlier Internet space and the necessity for safer connections between Internet users. The latest hot topic from Qian-Gua Data reveals a massive surge of nearly 4 million interactions and 8 billion views on the hashtag #BabySolidFood.



TREND 06

PURPOSEFUL CONSUMPTION



With the slowdown in consumption, the value-driven mindset of Gen Z leads them to prioritize the product itself when making purchasing decisions. The pursuit of true emotional satisfaction drives them to break away from the chaos and hustle of life, and instead center on their own well-being and meaningful life endeavors.

CONSUMERS' COUNTERATTACK

ALTERNATIVE ABOVE ALL

It is normal for non-gen Z consumers to substitute budget-friendly items for expensive, well-known brands. To avoid unnecessary brand premiums, 61% of Gen Z say they will look for and choose alternatives. Instead of splurging on costly items, young people are now prioritizing buying only what is essential.

SWAP FOR JOY AT ZERO COST

Youth culture has embraced the concept of SWAP, where they use second-hand platforms such as gofish (xianyu) to trade items and spread joy without spending any money. Apart from identical trades, there are options for exchanges across different categories, like exchanging lodging while traveling and swapping expertise. Looking for something specific? Head to the second-hand platforms.



Gen Z's unwavering battle against the hold of consumerism.

TRASH HUNTER

Today, a rising number of young people are opting to recycle abandoned furniture and other items found on the streets, even for building a new living space. It has been found that 40% or more of Gen Z will shop around on different online platforms to compare prices before finalizing a purchase. Young people are having a blast on budget-friendly eCommerce platforms like Pinduoduo and 1688, where they discover both great deals and potential for entrepreneurship. Cost-effective second-hand products are becoming a popular choice among Gen Z, as it not only helps them cut costs, but also provides an exciting 'hunting' experience.

SHOW OFF THE ECONOMICAL

A new competition has emerged among Gen Z, where the goal is to make the most cost-effective purchases. A majority of 64.61% of Gen Z is attracted to discounts, as shown by the popularity of on group-buying, cashback websites, resale platforms, and livestreams to acquire coupons and score their desired products at unbeatable prices. People who score a better deal on a purchase often can't help but show off to their peers, coworkers, and even on social media, sparking a race for the most economical rather than the privileged.

FIX OUR BODIES

These young people may be in their twenties, but their bodies are no less fragile than those of sixty-year-olds.

A PRIORITY FROM THE TOP

For the youth, hair loss outpaces their financial gains. JD Supermarket's findings show that 69.8% of hair loss prevention product buyers are under the age of 30. Over the past two years, the demand for hair loss prevention products has seen a surge among young buyers, with shampoo sales claiming the majority share of the market at 75%.

WELLNESS STARTS WITH HEALTHY TEETH

The pandemic's stay-at-home period caused Gen Z to reexamine their own lifestyles, resulting in a strong urge to manage their well-being. The majority (76.5%) of the Gen Z population, as highlighted by iMedia's data, places a strong emphasis on maintaining good oral health to protect their physical well-being from dental issues.

GEN Z'S FOURTH MEAL

The high-speed society has left a significant mark on Gen Z, with disrupted routines, late nights, and heavy workloads contributing to physical and mental sub-health concerns, ultimately compromising their immunity. Nutritional products have become a popular fourth meal choice among Gen Z, who view them as a convenient and compatible fit for their lifestyle. This is in contrast to the traditional approach of following a healthy diet, getting adequate sleep, and staying physically active. The latest data from oBP reveals that China has emerged as the second largest consumer of VDS (vitamin and dietary supplements), with a projected market size of 235 billion yuan in 2025.

MASTER OF SLEEP

Out of all those affected by insomnia, 34.5% are from the Gen Z demographic, making them the primary consumers driving the trend towards sleep economy. Now they are actively searching for a smarter solution to their sleep issue, sparking over 400,000 conversations on Little Red Book. The young generation of today not only yearns for quality sleep, but also strives for the ideal bedtime experience. With a set of intelligent sleep technology, their home is optimized for a good night's rest, including a smart mattress, curtains, and lamps that automatically adjust for maximum comfort.

THE GREAT MIND RETREAT

Chinese youth is facing a major challenge - stress. Data indicates that almost half (46%) of the Gen Z demographic is facing troubling mental health issues. The timely management of emotions and the ability to find moderate pleasure are now considered vital skills for success in the modern world. Topics like 'meditation', 'healing', and 'yoga' experienced a twofold surge in discussions on Little Red Book during the first half of the year. The next trillion-dollar market could be in the body and mind sector.

GEN Z





DEVOTED PET OWNERS

The value of pets has soared to great heights in human civilization, becoming a source of spiritual comfort for the youth.

PET EVERYTHING

Dream pets for Gen Z are not your typical furry friends, but rather ones that are non-shedding, odorless, gentle, and noiseless; like a mango pit, a rock, or even digital pets. The video on 'raising a mango' has garnered 300,000 likes and 100,000 favorites on Little Red Book, with a large number of people sharing their own mango pet stories. Simultaneously, hedgehogs, ants, spiders, corn snakes, snails, black beetles, or even pet pigs have captured the heart of young people as their preferred companions. As of 2022, China's pet market had a total of 220 million pets, with approximately 25% of them being birds, reptiles, or unconventional pets.

PET EMPOWERMENT

Pet ownership has emerged as a new form of self-care and anxiety management for Gen Z, amidst a lack of emotional support. On average, every 8 families in China owns a pet. Of all pet owners, Gen Z represents around 23%, with 49.9% treating their pets as part of the family, 23.7% seeing them as their own kids, and 18.3% valuing them as close friends. This has given rise to a cultural craze of pet-focused activities, including pet programs and pet dating. Pets have gained recognition for their role in family decision-making, contributing to the concept of pet empowerment.

PET ECONOMY

Pets offer people companionship and comfort, while also fueling a rise in consumption. The index of pet economy sector, as reported by East Money news, experienced a 3% year-on-year growth, reaching a total of 755.57 points and a turnover of almost 1.7 billion yuan. For many young pet owners, intelligent pet products such as pet feeders, cat litter boxes, and pet water dispensers are essential tools in managing the daily challenges of pet care. From clothing and food to housing and transportation, the pet supply chain caters to every aspect of a pet's life. This includes specialized services like pet-friendly restaurants, pet transportation services, pet healthcare plans, and pet funeral arrangements.

LIGHT AND LIVELY OUTDOOR PLAYTIME

Gen Z's heightened awareness of personal emotions is fueling a stronger push towards experiential projects, making outdoor activities a convenient outlet to meet this evolving need. The demand for camping, frisbee, paddleboarding, and other outdoor activities is increasing. The once-niche outdoor recreational sports have now become a new fashionable trend among the urban population. With a rise in popularity and a move towards upscale styles, the variety of outdoor gear options has grown significantly. Searches for 'camping' have skyrocketed by 447% in the first half of 2023, while 'camping base' has recorded an astonishing 977% increase year-on-year. There was also a 150% rise in the turnover of tents and mats, a doubling of sales for sleeping bags and hammocks, and a 4-fold growth in the turnover of RVs.

THE GARDENER

Young people have eagerly adopted a 'greener' lifestyle, especially during the pandemic when they utilized their work from home schedule to engage in gardening. More and more options for home planting are becoming available. The demand for 'nutrient soil' skyrocketed in the Spring of 2023, with a threefold increase in sales, especially among those new to gardening. Additionally, the growth rate for organic fertilizer, compound fertilizer, and other planting fertilizers surpassed 300%, while seed commodities experienced a 207% growth rate. Videos on bilibili, providing tips on selecting the best plants, have surpassed 2 million views.

WHERE MUSIC MEETS NATURE: OUTDOOR UTOPIA

The well-known outdoor variety show, The Big Band, has experienced a remarkable increase in its Douban rating, jumping from 7.2 to 8.7 and maintaining its exceptional score, garnering over 220 million reads on Weibo's hot topic. Outdoor music festivals are more than just about music. Nature serves as the perfect backdrop for outdoor music festivals, providing a much-needed escape for urbanites seeking sunshine, greenery, dazzling fireworks, and the chance to belt out tunes and connect with new acquaintances.



NATURAL DETOXIFICATION

Immerse yourself in the tangible and dynamic world of nature to discover life's mysteries.

IN CONCLUSION

Gen Z's outlook on the world has been reshaped by the pandemic, pushing them to confront inconsistencies and uncertainties in a diverse manner, leading to a shift in their consumer mindset.

Today, confidence in culture, emotional value, cutting-edge technology integration, entertainment influence, social influence, and excellent value for money can all be the key drivers behind the buying decisions of young people.

We believe that brands who are able to understand and resonate with Gen Z through these future trends will find success in the youth market and beyond. We are excited to collaborate with marketers in creating ideas that truly resonate with Gen Z while establishing a meaningful connection between them and brands/platforms.



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ABOUT DENTSU Z

As the driving force of Gen Z creatives at DENTSU CREATIVE, the dentsu Z team takes a proactive approach in strategizing and proposing solutions for clients. Through the use of cutting-edge technology, they continuously push boundaries to create meaningful cultural experiences. With their unique perspective as members of generation Z and young innovators, dentsu Z provides valuable insights and builds authentic connections between brands and the next generation of consumers.

ABOUT DENTSU CREATIVE

DENTSU CREATIVE is dentsu's sole global creative network that transforms brands and businesses through the power of Modern Creativity. 2022's Cannes Lions Agency of the Year, it is made for integration with dentsu's Media and CXM networks through Horizontal Creativity. 9,000 creatives across the globe are connected to dentsu's Media and CX experts to deliver ideas that Create Culture, Shape Society, and Invent the Future.

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ABOUT DENTSU

Dentsu is the network designed for what's next, helping clients predict and plan for disruptive future opportunities and create new paths to growth in the sustainable economy. Dentsu delivers people-focused solutions and services to drive better business and societal outcomes. This is delivered through five global leadership brands, Carat, DENTSU CREATIVE, dentsu X, iProspect and Merkle, each with deep specialisms. Dentsu's radically collaborative team of diverse creators unifies people, clients and capabilities through horizontal creativity to help clients create culture, shape society, and invent the future. Powered by 100% renewable energy, dentsu operates in over 146 markets worldwide with more than 72,000 dedicated specialists, and partners with 95 of the top 100 global advertisers.

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