

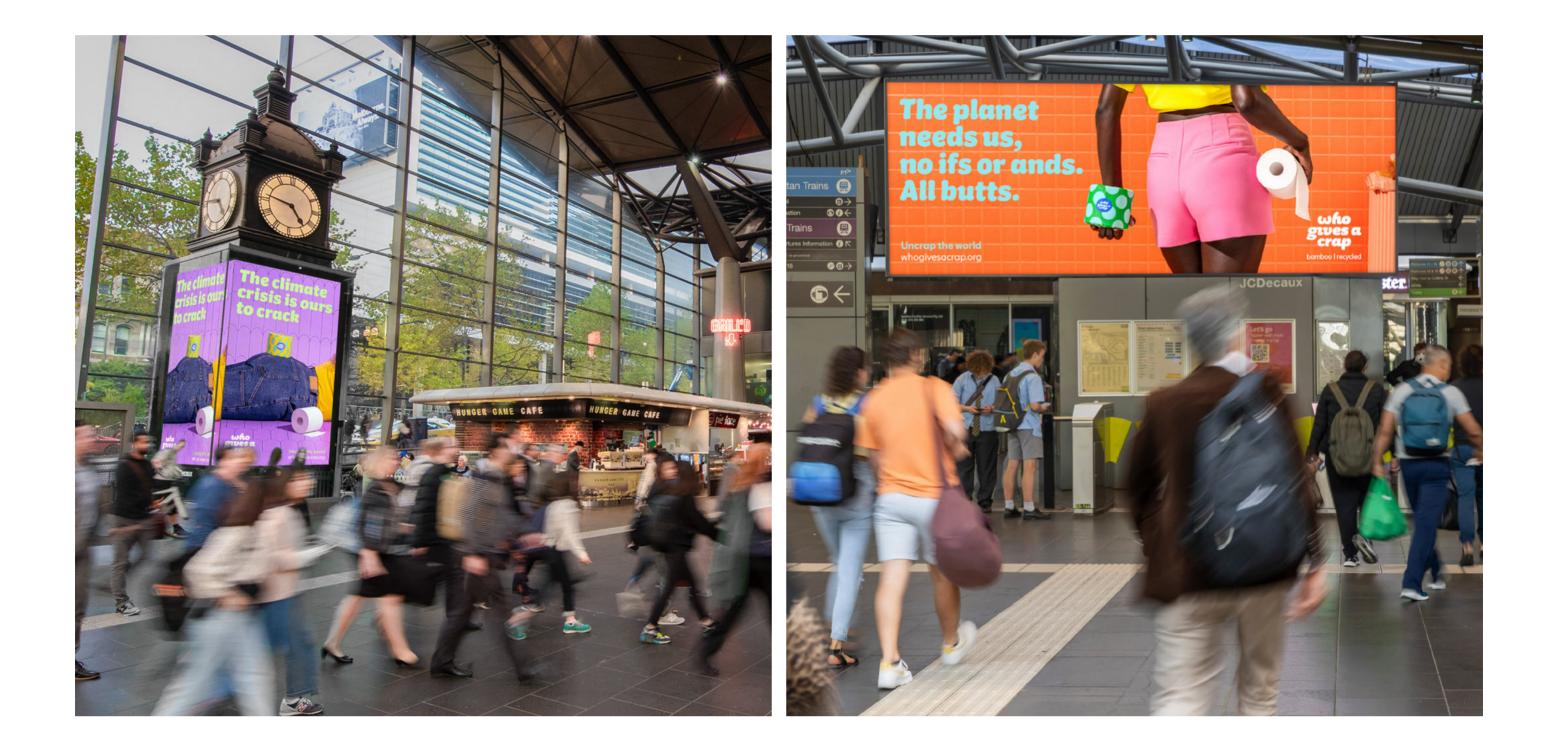
Issue 32 2023

## GEN Z : (IRL)

Prepare for a monumental shift as Gen Z takes centre stage and reshapes the world as we know it. Gen Z accounts for over one-third of the global population and will soon outnumber Millennials; they are entering the workforce and spending money on the products, services, and solutions that brands provide and are creating for the future.

At JCDecaux, we understand the profound significance of this generational shift. That's why we've embarked on a unique collaboration with renowned strategic foresight consultancy, The Future Laboratory. Together, our mission was to unlock the Gen Z mindset and analyse how they are revolutionising the demographic landscape, both in Australia and beyond. In this special Gen Z edition of The Frame, we share insights into the core values that drive this one-of-a-kind generation and showcase a selection of brands that are providing meaningful connections with Gen Z in the real world.

#### Find out more and download the full Gen Z: The IRL Opportunity report **here.**



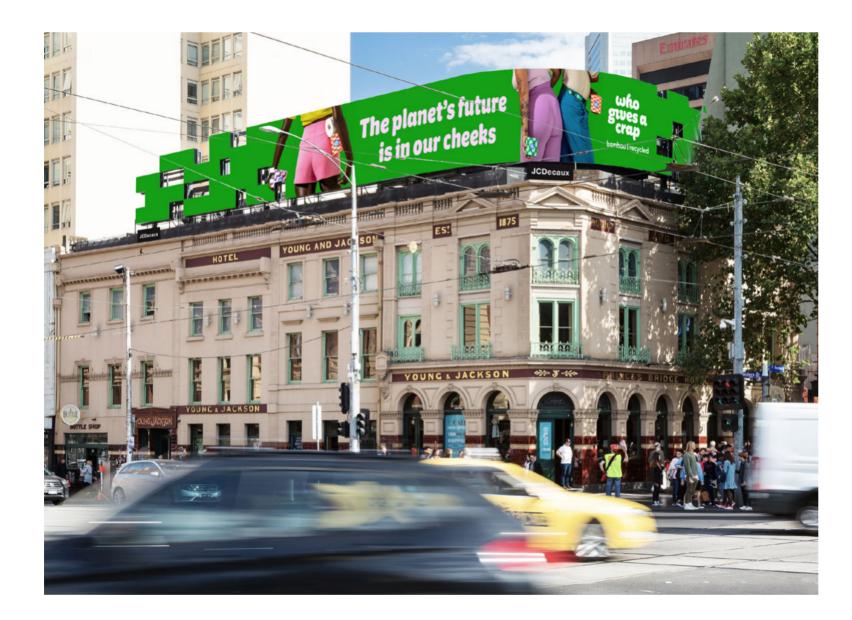
## CLIMATE CRISIS IS OURS TO CRACK

Gen Z is demanding sustainability from businesses, and they're willing to pay extra for it. According to Edelman, 71% of this socially conscious generation are willing to pay more for goods and services that align with their core beliefs.

Who Gives A Crap has disrupted the toilet paper category with cheeky messaging, more environmentally-friendly products and donating 50% of profits to charities like WaterAid Australia, helping improve sanitation for those in need.

To raise awareness about the importance of helping the planet (no ifs, or, ands. All butts), Who Gives A Crap is running a multi-format campaign across JCDecaux Digital Large Format, Transit, and Rail. **Each creative is equal parts eye-catching and laugh-inducing, and behind the witty slogans lies a powerful message: making sustainable choices can be fun.** This style of messaging closely aligns with the values of the next generation.

Together, Gen Z and Who Gives A Crap are wiping out sustainability issues, one bathroom visit at a time.







## UNITING ALL GENERATIONS

In the run-up to and during National Reconciliation Week, Reconciliation Australia conducted a **nationwide campaign using high-reaching JCDecaux Large Format and Smartframe networks,** while Reconciliation WA ran a sister campaign aimed specifically at Perth residents on **Smartframes, Rail and Airport.** 

This year's theme – Be a Voice for Generations – encouraged Australians to be a voice for the movement, tackling the unfinished business of reconciliation for generations to come. The campaigns advised Australians to be a voice by listening, and it appears Gen Z is tuning in the loudest. Despite making up only 11% of the national 18+ population, Gen Z is expected to significantly impact the outcome of the Voice to Parliament referendum later this year. 85% are forecast to vote yes, compared to 33% over the age of 75 (March Guardian Essential poll).

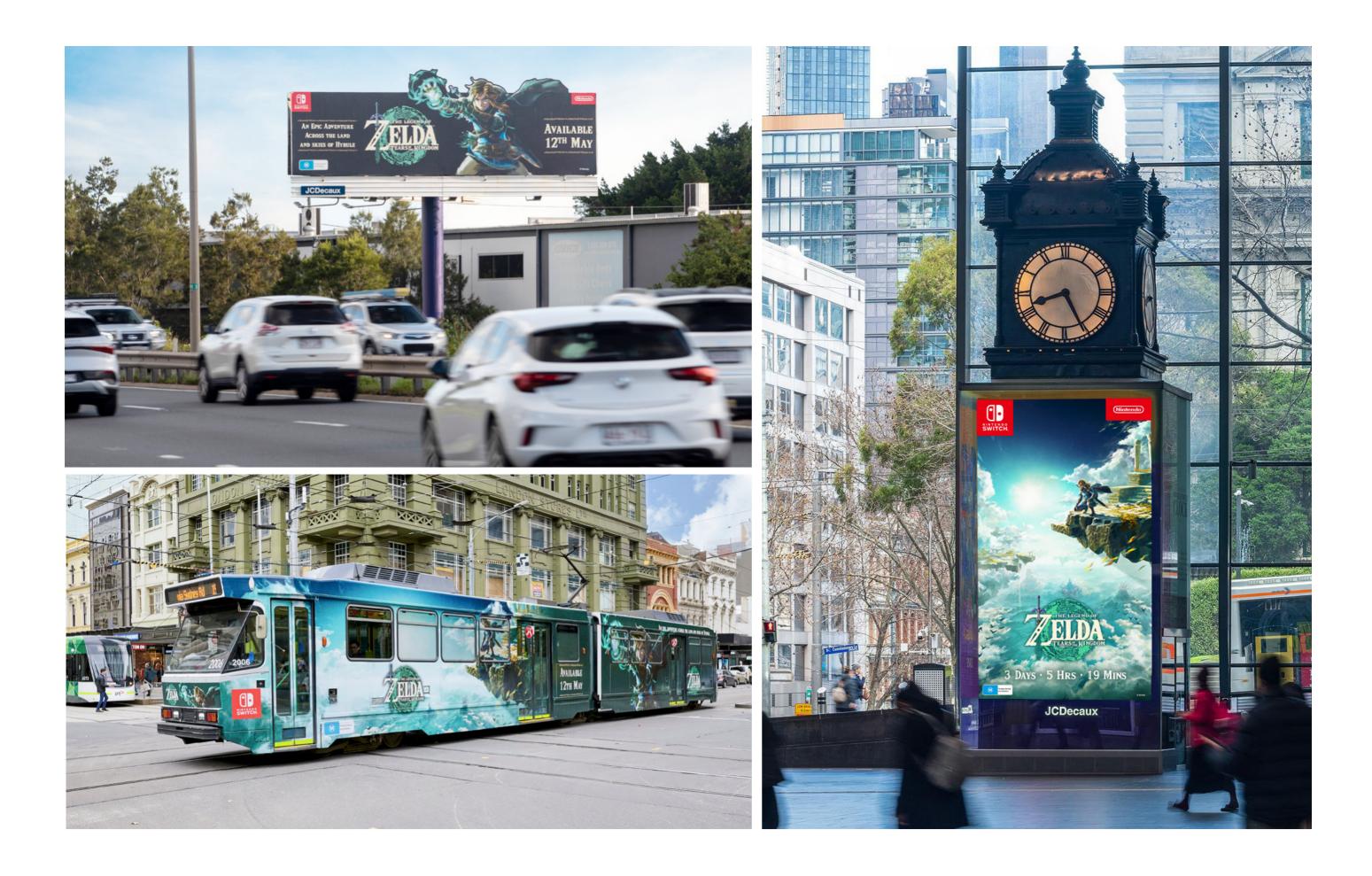
Both Reconciliation Australia and Reconciliation WA capitalised on Out-of-Home's unique ability to engage people from every demographic; making reconciliation everyone's business.





margin, Gen Z want more 'We than Me'-they prefer to have brands make the world a better place over brands making them a better person.

Source: The Edelman Trust Barometer 2023, Australia



#### ZELDA'S LEGENDARY TAKEOVER

Born into the age of the internet, with fast technology and global connectivity, it comes as no surprise that Gen Z gravitates towards gaming as their primary source of entertainment. The recent release of Nintendo's latest instalment in The Legend of Zelda series, "Tears of the Kingdom", was highly anticipated among gamers worldwide, who eagerly awaited the launch of the immersive action-adventure game on Nintendo Switch.

Nintendo used JCDecaux's most impactful and attention-grabbing media executions to spark excitement among fans who cherish the nostalgic allure of past Zelda games and open-world adventures. JCDecaux Digital Large Format, Transit Megasides and Wraps, Smartframes, and countdowns within the Rail environment, combined with larger-than-life 2D Classic Large Format extensions, enticed gamers to delve deeper into the enchanting Zelda World.

In the three days following its launch, The Legend of Zelda: Tears of the Kingdom sold over 10 million units worldwide, becoming the fastest-selling Nintendo Switch game of all time.



of Gen Z play video games on smartphones, gaming consoles or computers every week. Source: Deloitte, Digital Media Trends, March 2022

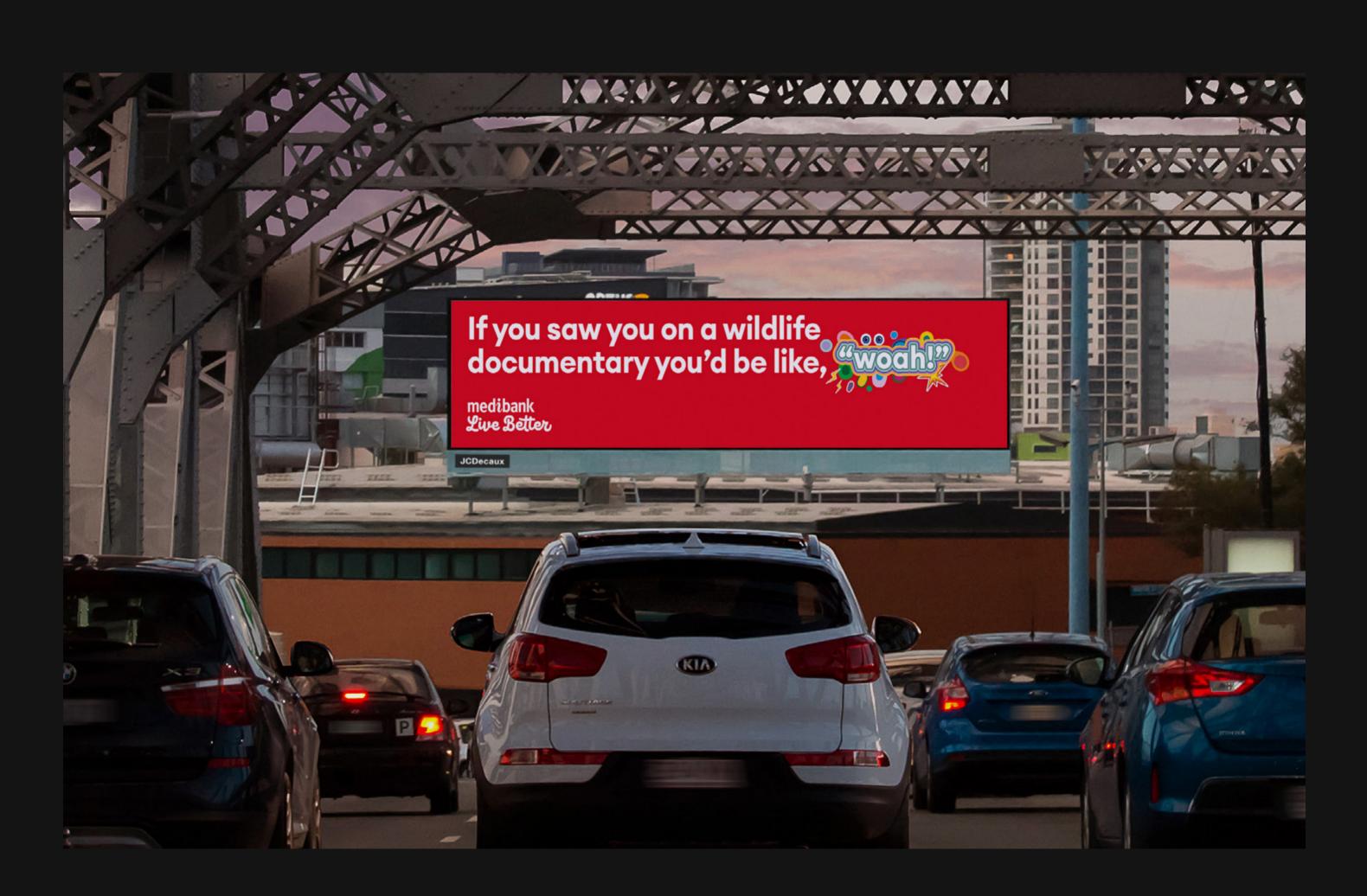


# NIKE, ALL FOR WOMEN'S SPORT

Gen Z are activists who live by their values. With conversations about gender equality becoming louder in 2023, and the highly anticipated FIFA Women's World Cup approaching in July, Nike continues to demonstrate its commitment to women in sport. The campaign features Australia's national women's soccer team, the Matildas, and is running across **JCDecaux Digital Large and Small Format and Rail in prominent locations near stadiums hosting FIFA matches.** This strategic move aims to generate excitement around women in sports, while shining a spotlight on the remarkable journey of the Matildas, as they prepare for what is set to be the highest attended Women's World Cup in history. Let's go, Matildas! **70%** of Gen Z are strongly interested in a social or

political cause, using their voice, spending power, and deeds to implement change. Source: Edelman





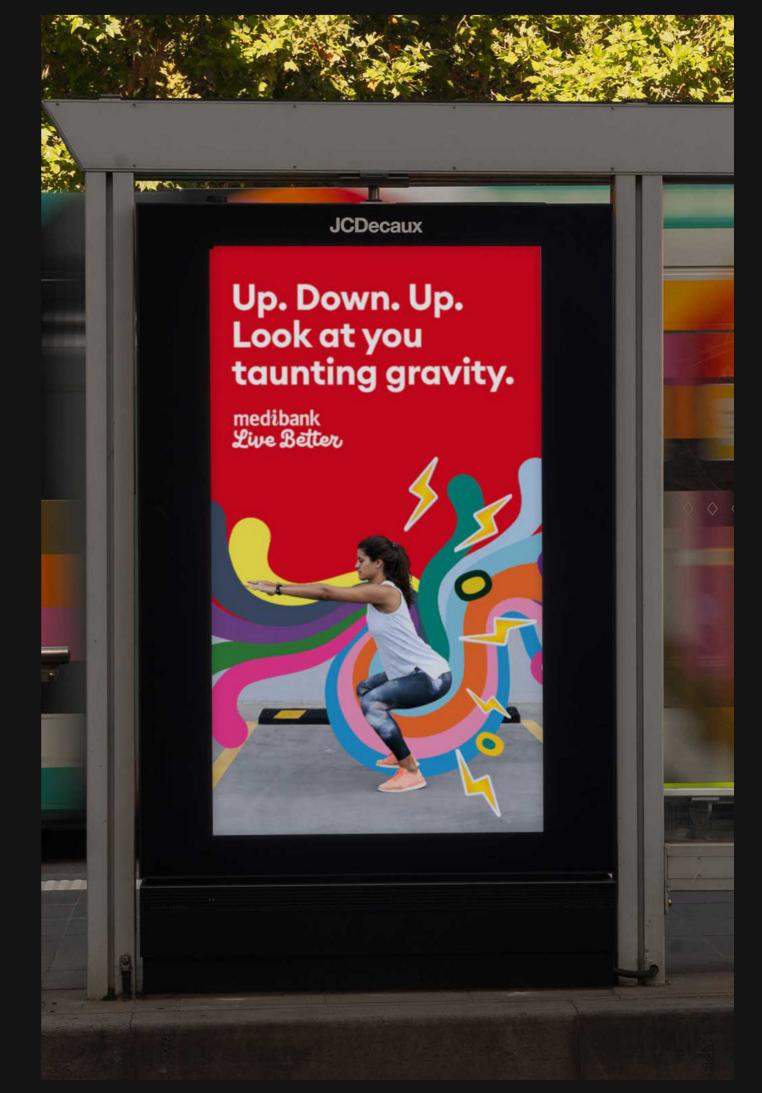
### YOU'RE ONLY HUMAN

Many of us watch documentaries and are awestruck at the incredibility of nature, all the while forgetting that we – as humans – are equally amazing. In its latest campaign, Medibank is encouraging Aussies to reframe the way they think about their bodies and health by showing appreciation for the extraordinary feats we are capable of. This inspiring, humorous, and unifying style of communication is a great example of content that's particularly effective among Gen Z audiences, who want brands to connect them to others, create communities, and engage people across demographics.

To increase visibility in the lead up to the end of financial year, a key period for private health insurance, Medibank is using JCDecaux Classic and Digital Large and Small Format across roadside and rail. The colourful, attention-grabbing campaign drives broadcast reach and frequency, engaging audiences across multiple formats and locations.



of Gen Zs see Out-of-Home as entertaining and memorable.



Source: JCDecaux Gen Z IRL Study, 2023 n=1004



### LIFE'S GOOD WHEN YOU GIVE A XXXX

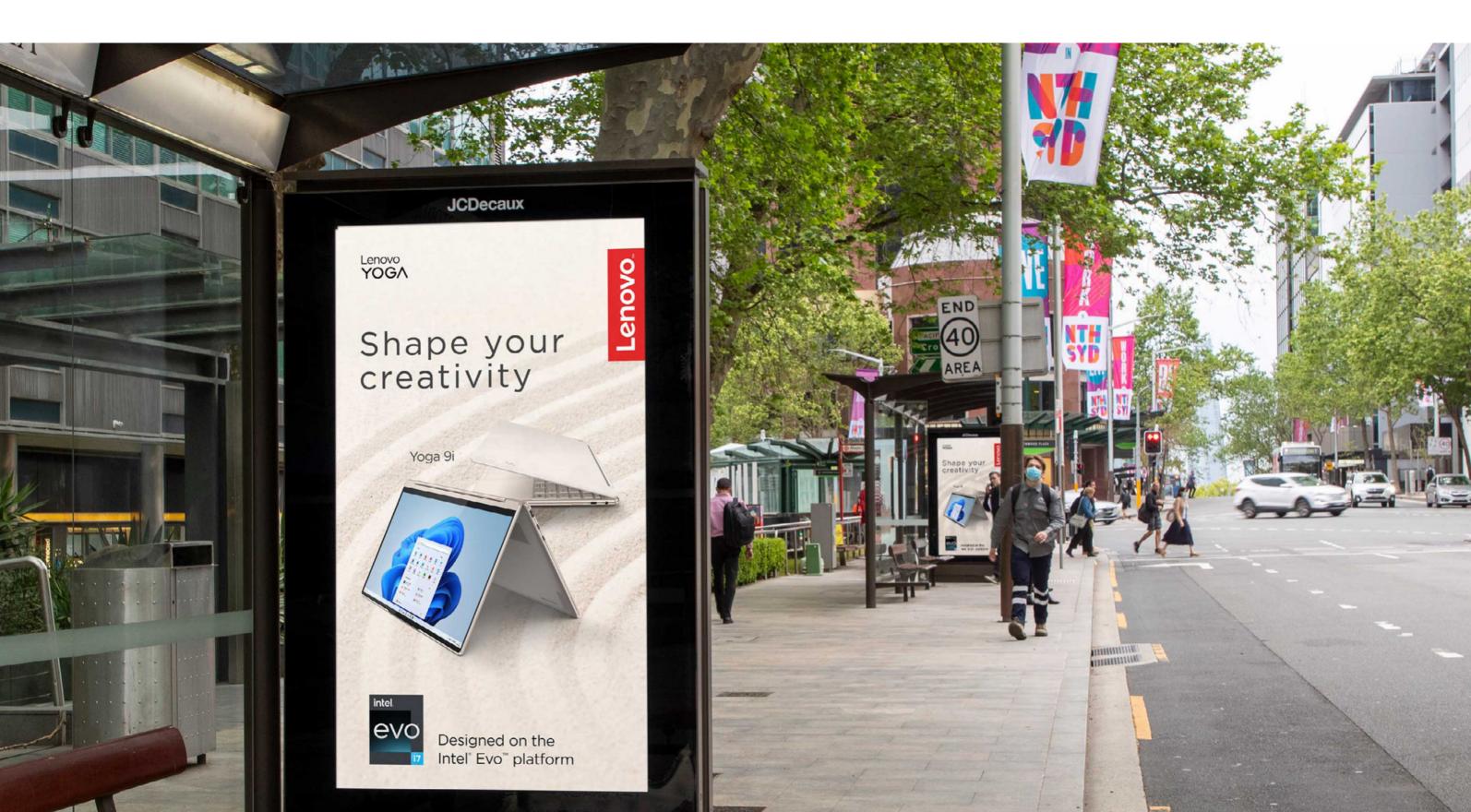
Savvy marketers are using Out-of-Home to create dynamic, adaptive or contextual playscapes that understand and cater to Gen Z's state of mind in real-time. XXXX Gold has done just this with the launch of the latest iteration of its "Life's Good" campaign across JCDecaux Large and Small Format in regional and metro areas of Queensland – the home of the beer. As a major sponsor of State of Origin, the campaign coincides with Game 2 at Brisbane's Suncorp Stadium. A number of Classicframe panels were transformed into larger-than-life XXXX Gold 3D cans to further surprise and delight the Brisbane audience and drive engagement via a QR code. This campaign is a prime example of how brands can transform Out-of-Home into a truly engaging experience for all to enjoy.



of 18+ Gen Z in Australia believe campaigns that emphasise interaction, personalisation, fun, and buzz should be used more often to engage consumers.

"Gen Z have grown up in a values-laden era, but they still expect advertising that is fun, experiential and sparks joy."

Mark McCrindle, futurist, demographer and social commentator



#### **TECH BRANDS GO IRL**

Despite being true digital natives, Gen Z harbours a special appreciation for in real life (IRL) interactions. Recognising this, tech brand Lenovo launched an **innovative JCDecaux Programmatic campaign, utilising Small Format locations in proximity to universities across Australia.** 

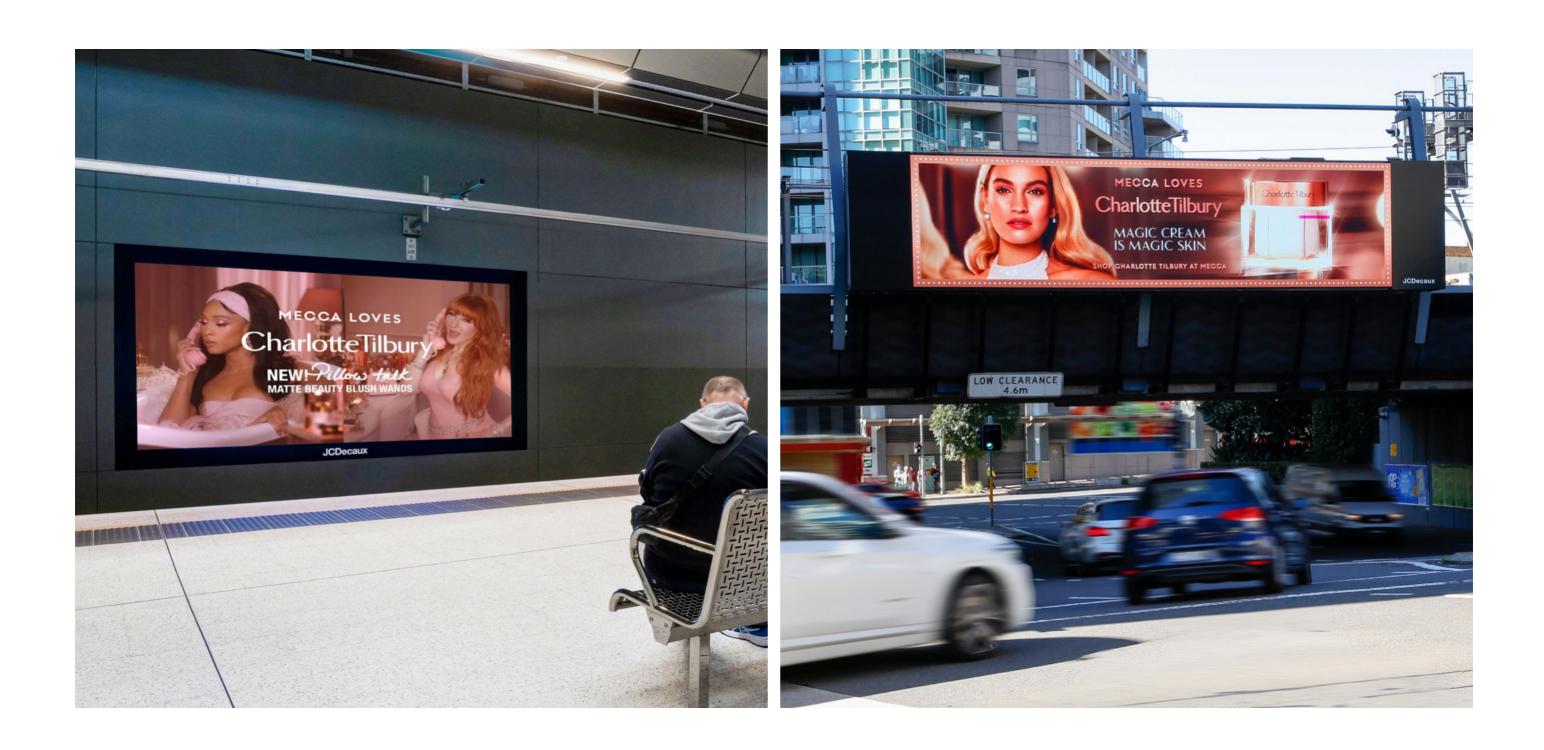
By leveraging the power of programmatic digital Out-of-Home and contextual messaging, brands can drive a surge in customer engagement. According to the OAAA and Harris Poll, 85% of Gen Z say they have engaged with public campaigns and taken action, with 46% downloading an app and 27% buying online.

Lenovo's winning formula of agility, reactivity, and flexibility combines technology with human connection, guiding Gen Z's focus from IRL to URL and back again.



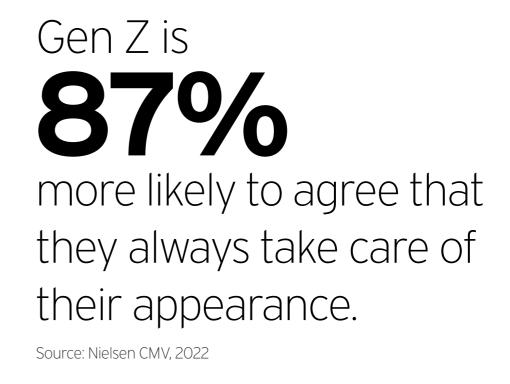
of Gen Z desire multi-channel brand experiences, encouraging marketers to reach them at many touchpoints with distinct languages.

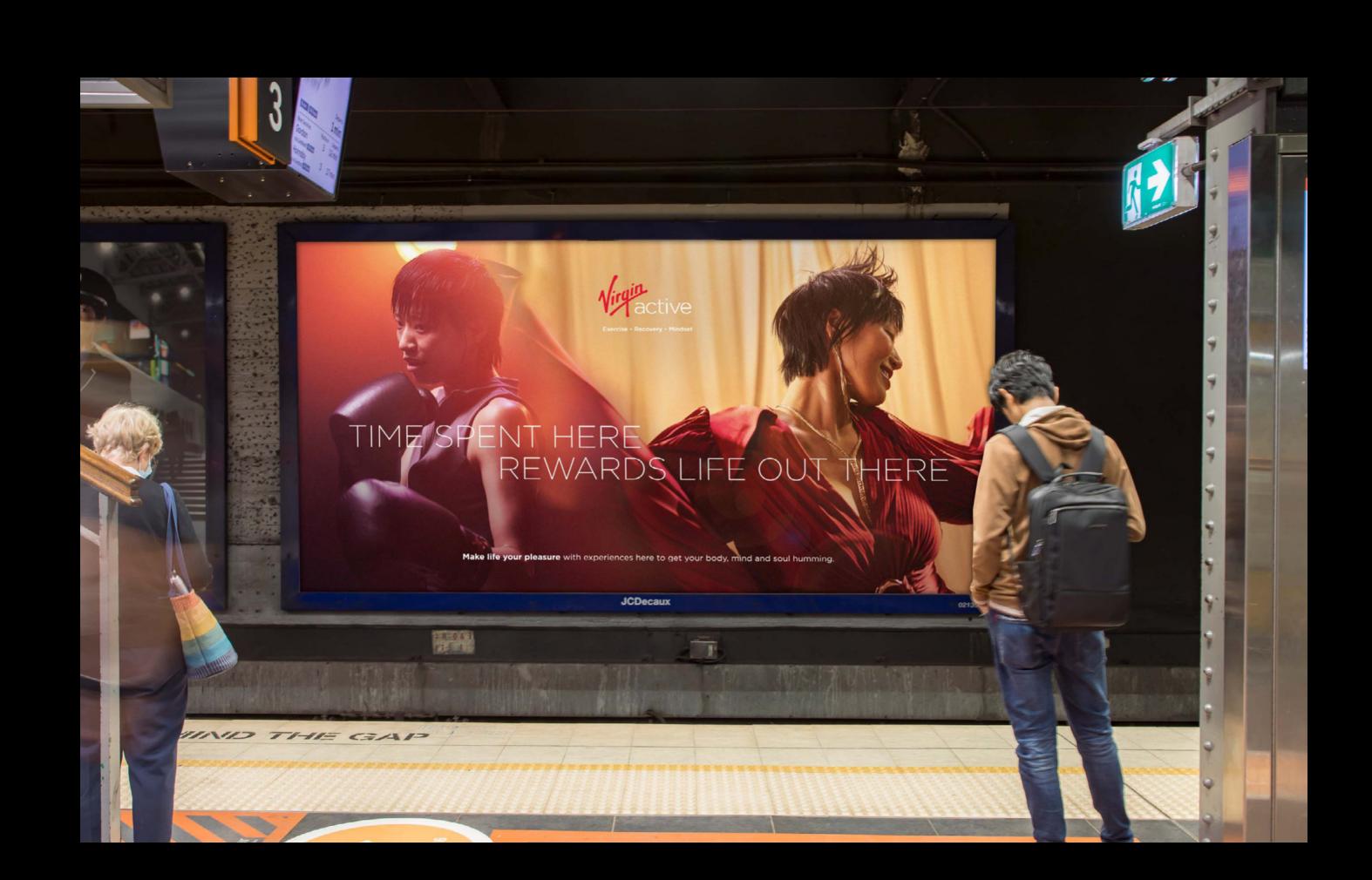
Source: CMO Council



#### GEN Z LOVES MECCA

MECCA loves Charlotte Tilbury, and so does Gen Z. Charlotte Tilbury's 'Pillow Talk' range has become an absolute favourite among the trendsetting Gen Z, so much so that one product from the range is sold every 10 seconds globally. To spread the word of MECCA and Charlotte Tilbury's latest magic makeup collaboration, the campaign featured across JCDecaux Digital Large Format and XTrackTV screens, creating an immersive experience that captured the essence of beauty in every frame. **Positioned in desirable locations in proximity to MECCA retail stores and busy shopping precincts nationally, the campaign caught the attention of audiences dreaming of that picture-perfect glow.** 



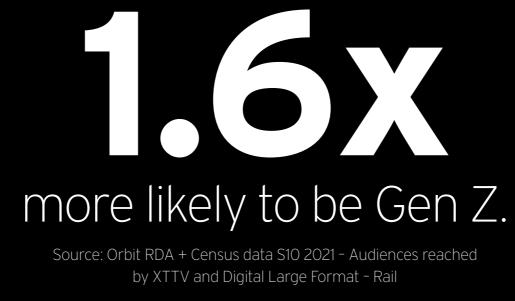


#### VIRGIN ACTIVE REWARDS LIFE OUT THERE

Gen Z is redefining the meaning of "healthy living". Having grown up with information at their fingertips, they are well-informed about the latest trends, fads, and breakthroughs in various aspects of life, particularly health and wellbeing. This heightened awareness has led Gen Zs aged 18-24 to be 1.7x more likely to visit a gym or fitness centre each week (Nielsen CMV).

Recognising this trend, Virgin Active is running a proximity campaign exclusively across JCDecaux Rail, targeting commuters within 2kms of its gyms. This allows Virgin Active to connect with individuals during a moment of pause amidst their daily journeys, reminding them that hard work in the gym will lead to more enjoyable experiences in daily life.

#### Rail audiences are





### WHITE FOX DOMINATE URL & IRL

Leading online fashion retailer, White Fox Boutique, has become the obsession of Gen Z fashion enthusiasts. With a staggering 2 million followers on Instagram and over 101,000 posts showcasing the iconic #whitefox hashtag, the brand is taking affordable, trendy clothing to the next level.

But White Fox Boutique's influence doesn't stop in the digital realm. Despite being an online-only retailer, White Fox Boutique has successfully transcended into the real world, dominating the streets with its presence through strategic collaborations with JCDecaux Transit and Small Format.

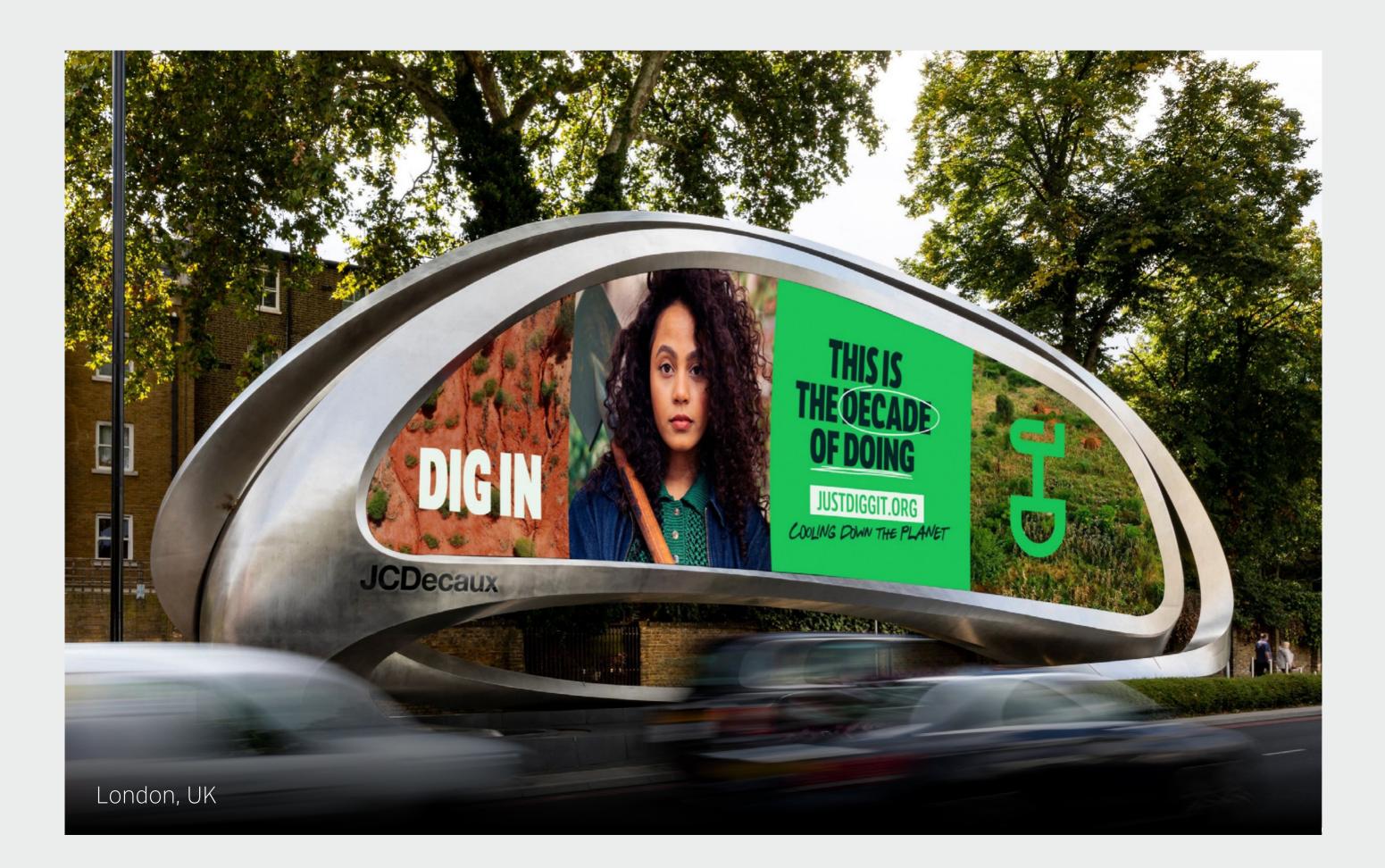
Bus Wraps work to command attention and ignite social media feeds, while broadcast formats including Portrait Sides, Portrait Backs, and Metro Backs extend reach in key suburban areas and drive the frequency of messaging. White Fox Boutique's cutting-edge style, unrivalled social media presence, and physical presence on the streets has solidified its position as the ultimate fashion destination for Gen Z.



Agree 'I try to keep up with the latest

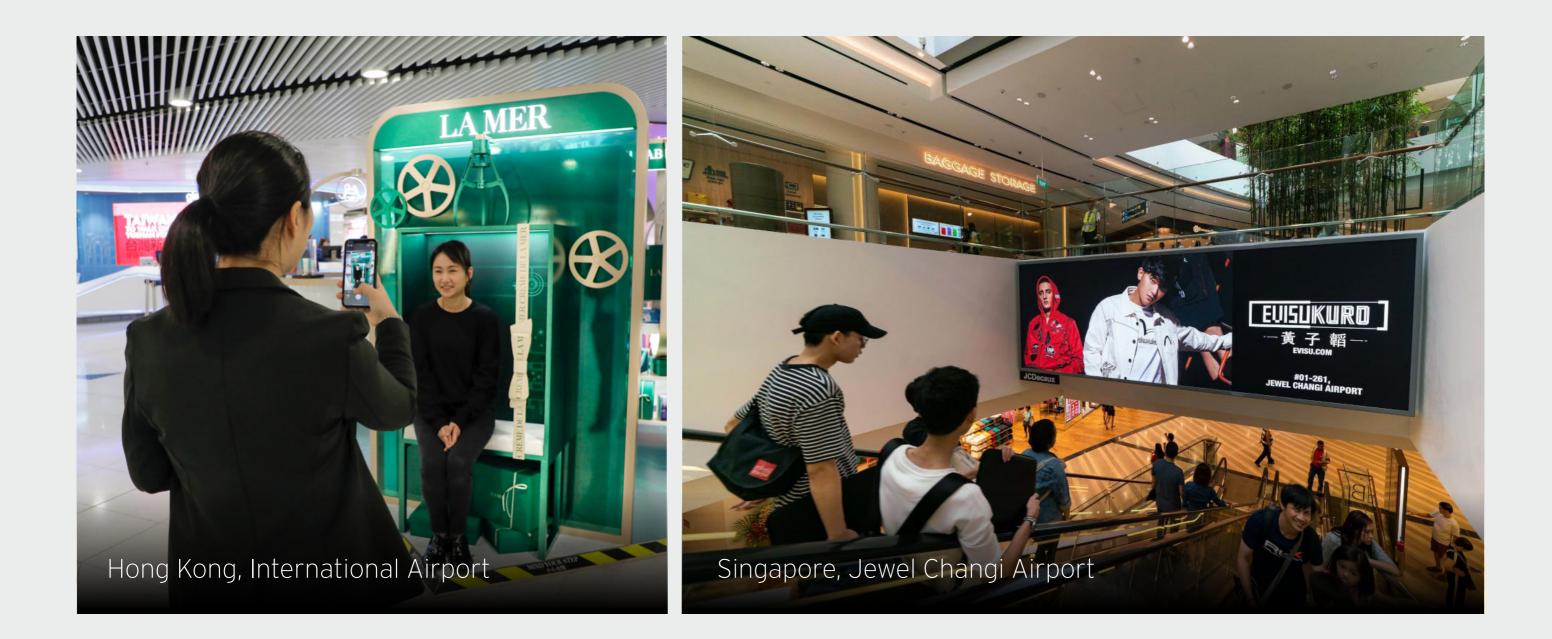
fashions', Gen Z 14-24.

Source: CMV, Nielsen, 2022



## GEN Z AROUND THE GLOBE

Gen Z is a focal point for marketers across the globe, and there are many brands that have embraced the key principles of engaging with this generation to deliver effective campaigns. From communicating a 'brand stand' or societal issue to transforming Out-of-Home environments into engaging playscapes, here are a few notable campaigns from our JCDecaux network around the world.



JCDecaux.com.au

If you have feedback or suggestions, please get in touch at TheFrame@jcdecaux.com © 2023 JCDecaux ANZ

