



The Snapchat Generation

A new lens on identity, expression and connection in Saudi Arabia



STRAT7
CROWD.DNA

This report uncovers the trends that the Snapchat Generation are leading and the impact they are having on the world

We tasked ourselves with understanding who the Snapchat Generation are today and where they are headed.



We surveyed **19,000** people across 16 countries



...We spoke to **32 Snapchatters and their friends** across 16 countries



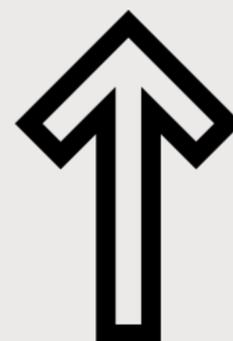
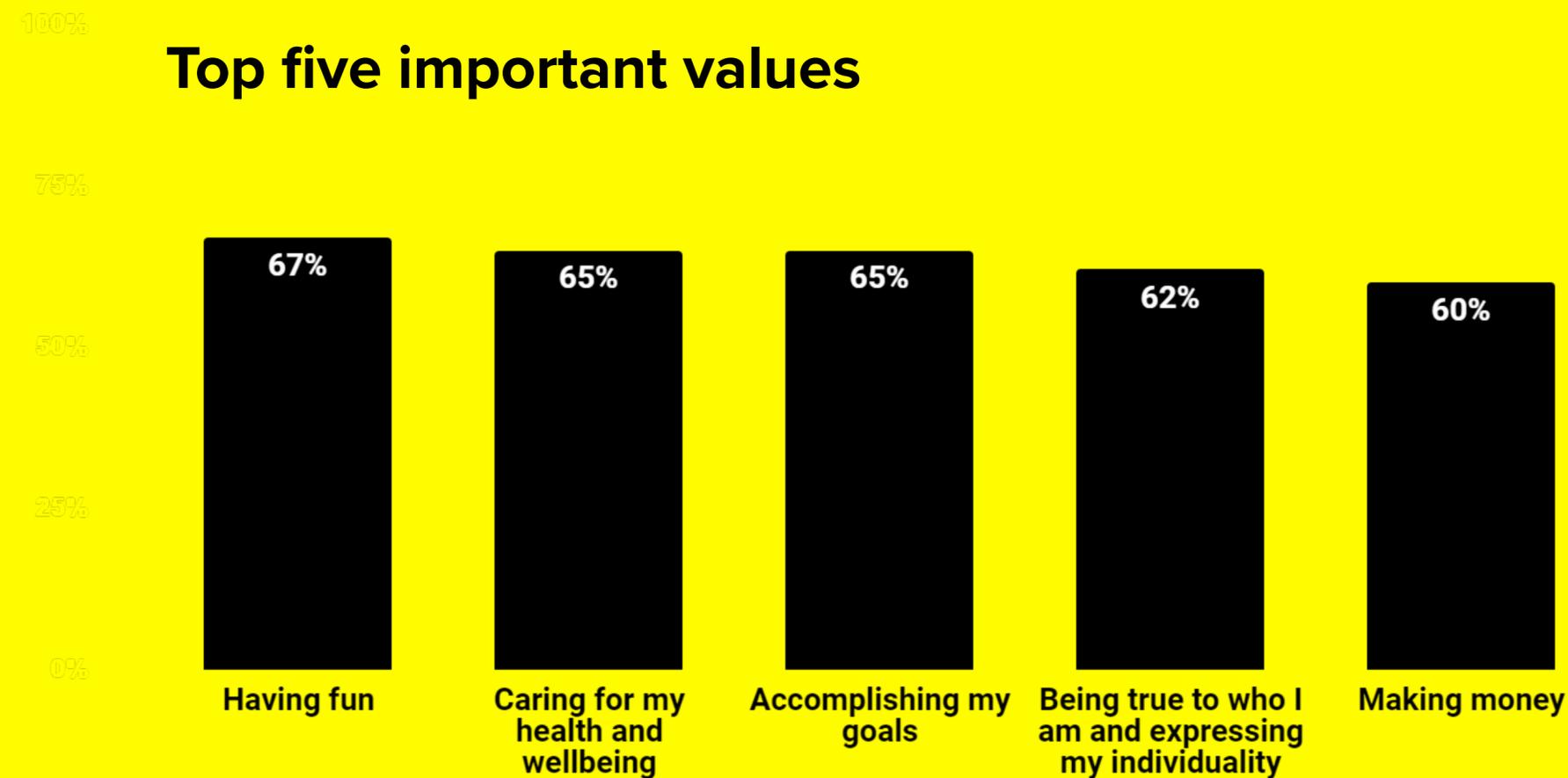
...and **interviewed four youth experts** from across the globe

This report focuses on the key findings in Saudi Arabia, based on a survey of 1,000 daily social app users



The past hasn't changed who Snapchatters are, but it has changed how they show up

Values that were important yesterday have become even more important today.



These top values have become **more important**

2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519 | Q: Which of these are important to you? | Q: How, if at all, has the importance of these values changed for you since before the pandemic?



This is a generation that is putting their values into action and evolving many aspects of how we live



Identity

Snapchatters are leading a shift towards **realness**, staying true to who they are and living in the moment.

98% enjoy sharing and celebrating moments in their life on Snapchat



Communication

Snapchatters are **redefining communication**, expressing themselves in more creative and inclusive ways.

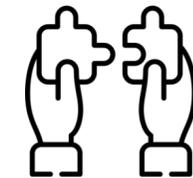
Snapchat is the **#1** app camera for creating photos and videos



Commerce

Commerce is changing, and Snapchatters are embracing a more **immersive shopping experience**.

97% of Snapchatters are interested in using AR for shopping, and Snapchat is the most enjoyed place to share shopping moments



Connection

Connection matters more than ever, and Snapchatters are looking to **engage with their friends, brands, and the broader world**.

85% of Snapchatters say connecting with friends is the simplest way for them to feel happier



IDENTITY

From guarded

Presenting the best version of yourself



To real

Exploring and embracing your true self



“

We are more open and less restrictive or traditional *[than previous generations]*. We are less close-minded and more open to different ways of doing things

”

Abdulrahman, Male, 25



Authenticity is increasingly important to the Snapchat Generation

68%



feel **“being true to who I am”** has become **even more important** to them since before the pandemic

2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519 | Q: How, if at all, has the importance of these values changed for you since before the pandemic?



Snapchatters are actively seeking out and building positive spaces

86%

agree

“I focus on using apps that feel like positive environments”



2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519, Non-Snapchatters N = 377 | Q: Please tell us the extent to which you agree or disagree with the following statements about your feelings and emotions.



“

You can express your feelings. You can evoke more on Snapchat... there is more emotion and interactivity with my friends when I share with them

”

Ragad, Female, 23



Snapchat is where they can be themselves

...free to play, create and connect



Top 5 emotions felt while using Snapchat

Happy **Open-minded** **Creative**

Connected **Playful**

2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519 | Q: How often do you feel each of the following emotions when you are using Snapchat?



**They're turning to
Snapchat to share
moments from their
lives...**

98%

enjoy sharing and celebrating
moments in their life on Snapchat



2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519, Non-Snapchatters N = 377 | Q: Which of the following moments do you enjoy sharing or celebrating on each app? (NET: all codes) TikTok 93% Instagram 95% Facebook 98% Messenger 97% WhatsApp 90% Twitter 87%





For brands, it's all about showing up in the right way

Tips for brands...



Meet people where they are

Brands should focus on how to complement the spaces Snapchatters are creating - spaces of freedom, safety and individuality. Match these by **keeping it light and playful**. Embrace casual tones vs polished visuals, be conversational rather than feeling the need to be impactful.



Accept them as they come

Embrace and accept the diversity of the Snapchat Generation. Brands should look to share **content that authentically portrays** what they stand for.



COMMUNICATION

From functional

Prioritizing efficiency over emotion



To creative

Creating deeper meaning in communication



“

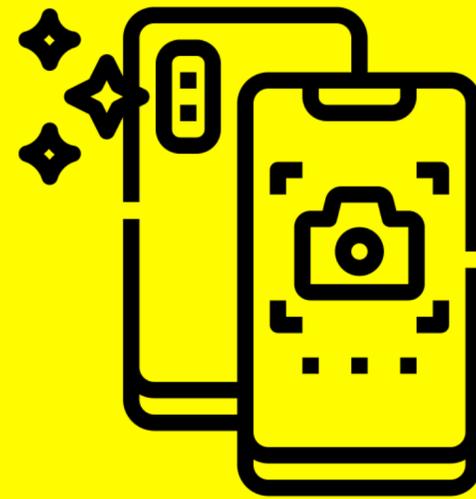
I might take a picture of something or take a short video and ask him [*my brother*] what he thinks...We can really share with each other all the time.

”

Abdulrahman, Male, 25



The Snapchat Generation is leading the way in creative forms of communication



98%

have used some form of visual communication when messaging friends

...and Snapchatters are



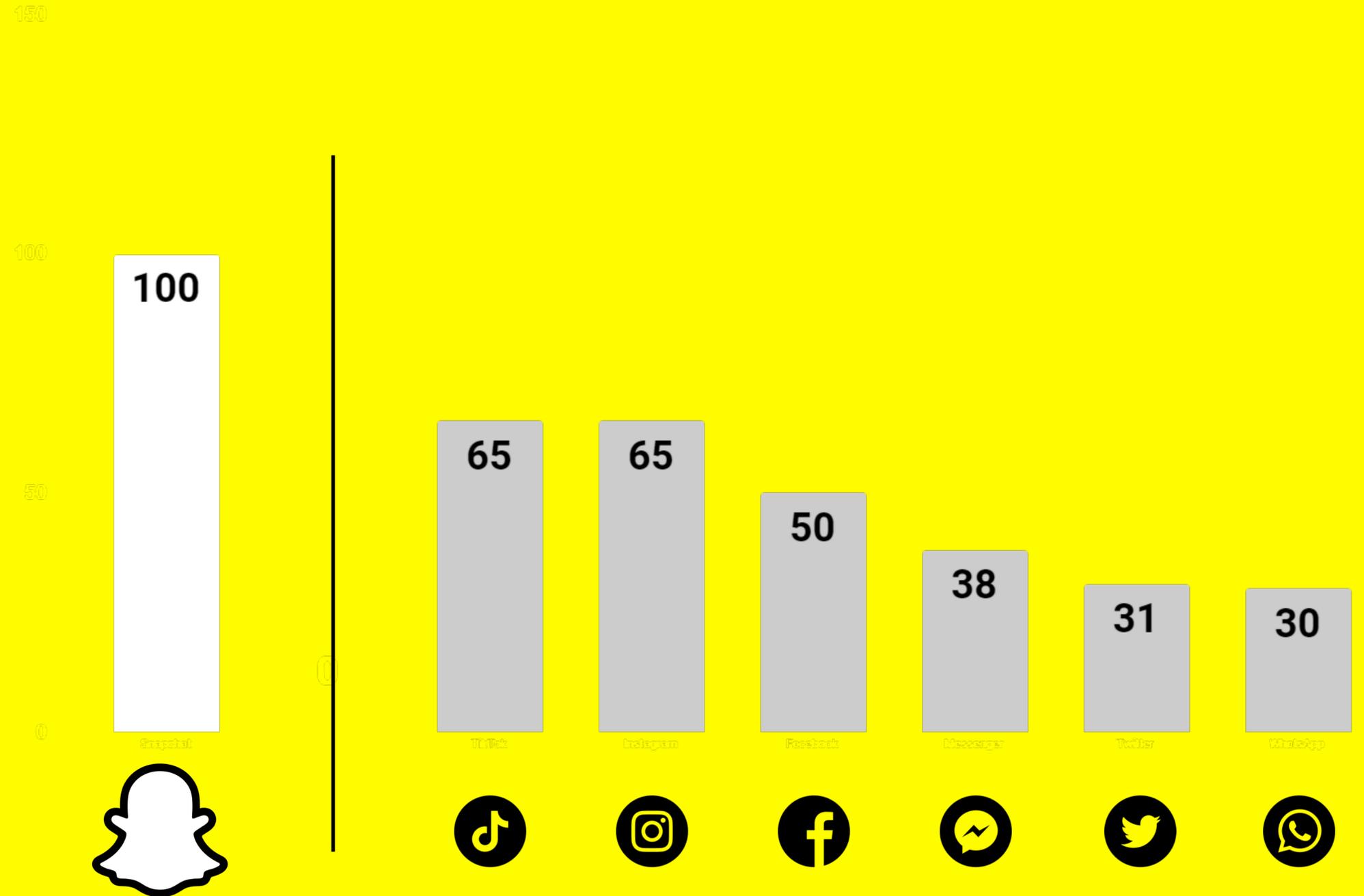
1.4x

more likely to have used AR to enhance their photos or videos

2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519 Non-Snapchatters = 377 | Q: Thinking about all apps you use, which of the following things relating to visual messages (e.g. pictures, videos, filters / lenses, emojis / bitmojis) have you ever done? (NET of all codes) | ...and which of these AR experiences have you already done? Used AR to...



Snapchat is #1 for being used to create content via the camera



2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Daily Snapchatters = 519 Daily TikTok = 341 Daily Instagram = 333 Daily Facebook = 338 Daily Messenger = 331 Daily Whatsapp = 336 Daily Twitter = 335 | Q: We would like you to think about the apps that you told us you use daily. Please tell us WHY you like to use each one daily. Please select all that apply. (NET: To take pictures / videos with the camera, To enhance my photos / videos / the world around me with lenses / filters / effects)



Visual communication builds personal connections

More than

3 in 5

Snapchatters use visual communication to get a more personal connection



2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519 | Q: Why do you like sharing / receiving visual messages (e.g. pictures, videos, filters / lenses, emojis / bitmojis) on apps? (NET: feel more personal, make it easier to build stronger connections / relationships, help me to feel more involved in my friends' lives, even if I'm not there)



“

I feel they are living the moment with me. Everyone feels close to each other. I have a friend in the UK and talk to her every day. I don't feel she is far away from me because I feel she is always there

”

Ragad, Female, 23



AR allows brands to connect with their customers on a closer level than ever before

63%

of Snapchatters say AR experiences feel more personal



2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519 | Q: How much do you agree with the following statements about Augmented Reality (AR) in general?





It's time for brands to adapt to new forms of visual communication

Tips for brands...



Stay relevant

Snapchatters want to communicate in creative and visual ways and brands need to adapt to the next generation of communication. Lose formal comms, embrace camera first.



Be inclusive

Given the diversity and playfulness of Snapchatters, brands that limit their image to fit only a specific type of consumer will be left behind. However, brands that can embrace inclusivity and lead with empathy will thrive.



COMMERCE

From traditional

Sticking to the familiar



To immersive

Experimenting with interactive tools



Snapchatters are carrying their fun and playful attitudes into 2022



Since the pandemic

65%

of Snapchatters feel **having fun** has become more important as a value

1.2x more likely than Non-Snapchatters

2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519, Non-Snapchatters N = 377 | Q: How, if at all, has the importance of these values changed for you since before the pandemic?



They're more likely to be experimenting than conforming to traditions

75%

of Snapchatters like to **experiment and change** aspects of their look / appearance

Snapchatters are

1.1x

more likely than Non-Snapchatters to feel this way



2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519, Non-Snapchatters N = 377 | Q: We're going to present you with a set of statements. For each pair, please use the scale to answer which you agree with most.



AR further enables Snapchatters to explore and play with their look

93%

of **Snapchatters** are interested in using AR to try on makeup or clothes



Snapchatters are

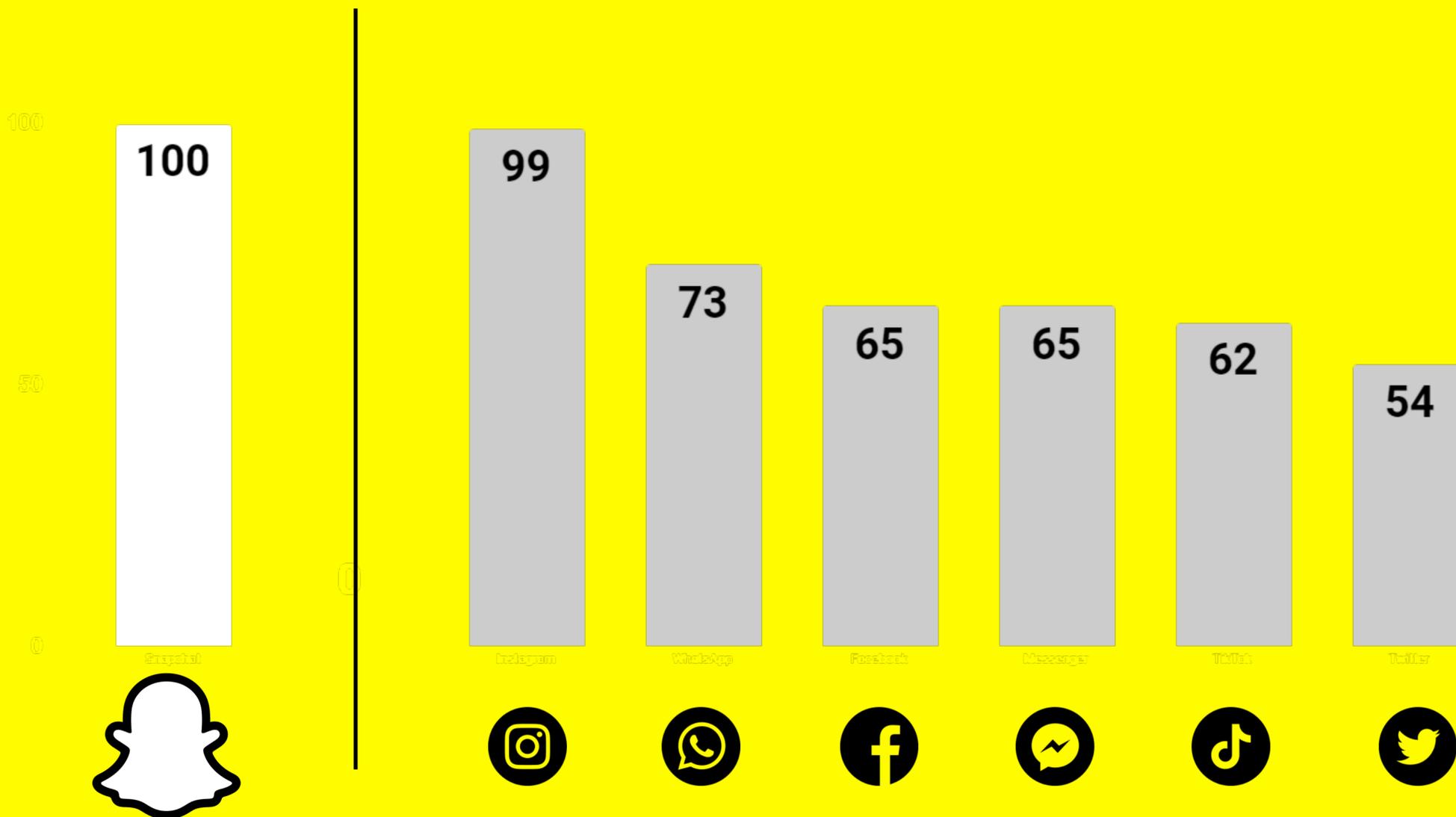
1.4x

more likely than Non-Snapchatters to have already used **AR to try on makeup or clothes**

2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519, Non-Snapchatters N = 377 | Q: Augmented Reality (AR) can provide many experiences. Thinking about what you can do with AR both now and in the future, how interested are you in each of the following? (NET: See how clothes or accessories look / fit, "Try on" makeup or beauty products) | Q: ...and which of these AR experiences have you already done? (NET: same as previous question)



The Snap Camera empowers Snapchatters to experiment, shop and share



Snapchat is the #1 platform where users enjoy sharing purchases they love or when shopping

2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Daily Snapchatters = 519 Daily TikTok = 341 Daily Instagram = 333 Daily Facebook = 338 Daily Messenger = 331 Daily Whatsapp = 336 Daily Twitter = 335 | Q: Which of the following moments do you enjoy sharing or celebrating on each app? (NET: When I've bought something I love, When I'm shopping)





On Snapchat, brands can lean into AR to help Snapchatters engage in more immersive ways

97%

of Snapchatters are interested in using AR for shopping

2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519
| Q: What are the reasons why you'd want to use AR for shopping? (NET of all codes except "I wouldn't be interested in using AR for shopping")



Tips for brands...



Allow personalization

Through AR, brands can offer more personalized, immersive shopping experiences than ever before. AR re-centers shopping around the consumer so Snapchatters can seamlessly interact with, try on, and purchase products with a single Lens.



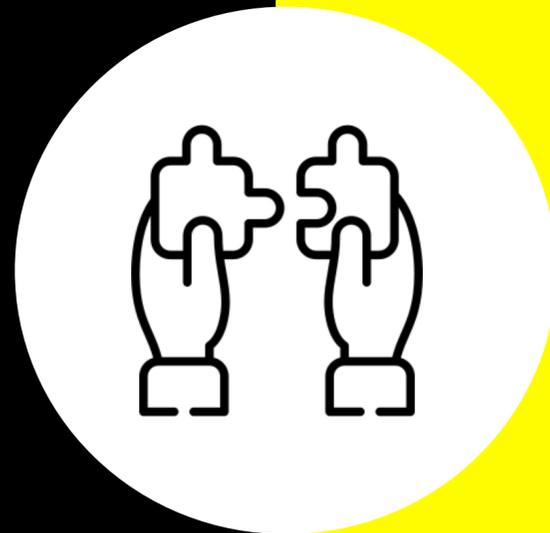
Fun and social

Snapchatters are seeking fun and social experiences when it comes to shopping. And they're turning to Snapchat to shop and share their joy. Snap Camera + Community = New Connected Commerce that drives real results for brands.

CONNECTION

**From
'I'**

Focusing on individual achievement



**To
'Us'**

Fostering collective happiness



“

I hope that I can also be an influencer in the future. To gain fame and have a positive impact on people who follow me

”

Abdulrahman, Male, 25



Snapchatters value relationships more now than ever before

Nearly

3 in 4

Snapchatters plan to **spend more time connecting in-person** than before the pandemic



2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519 | Q: Compared to before the pandemic, which of the following do you plan to do more of in the future (assuming there are no travel restrictions in place)? (NET: Going out and meeting new people, Hanging out with my family, Attending in-person events)



Building connections is a way for Snapchatters to take care of themselves

85%

of Snapchatters agree that **“connecting with close friends is the simplest way for me to feel happier”**



2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519 | Q: Please tell us the extent to which you agree or disagree with the following statements about your feelings and emotions.



... and a way for Snapchatters to create the change they want to see in the world

67%

of Snapchatters value taking action for the **collective good**

...and this group are



3.3x

more likely to want to use **AR shopping tools** to reduce their **environmental impact** (e.g. by minimizing deliveries and returns)



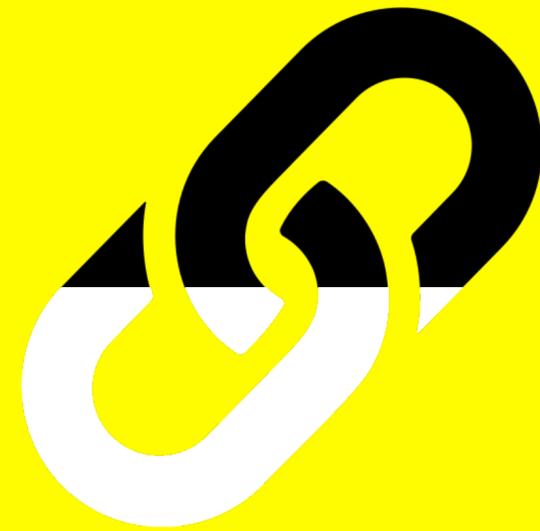
2.3x

more likely to say that **speaking up about social / political issues** has become more important since before the pandemic

2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519 | Q: Which of these are important to you? Please select all that apply. (NET: Reducing my environmental impact, Speaking up about social / political issues, Supporting my community and taking time to help others around me, Being open to learning from others and respecting different cultures) | Q: What are the reasons why you'd want to use AR for shopping? | Q: How, if at all, has the importance of these values changed for you since before the pandemic?



This desire for deeper relationships extends to brands



Nearly

56%

of Snapchatters now **feel it is more important for brands to build connections with them**

This expectation jumps even higher to

71%

among Snapchatters who are **digitally interacting with brands** more now than before the pandemic

2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519, Snapchatters who interact with brands digitally before buying from them N = 158 | Q: Now thinking more generally - compared to before the pandemic, which of the following have become more important to you when choosing brands to purchase products from? (NET: Makes me feel like I'm part of a community (e.g. through in-person events or a platform built around sharing ideas and reviews), Makes me feel like I'm making a difference in helping them grow, Incorporates my feedback / lets me have a say in the products they create, Helps me live up to my values)



“

I want to see [brands] tackling issues... I think if they try to tackle issues in KSA, that would be nice. I'd like to see brands talk about these issues more

”

Ragad, Female, 23



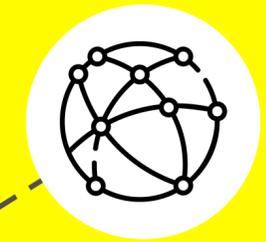
Brands can build connections with Snapchatters in a vast number of ways

67% say using AR lenses/filters helps me feel more connected to them



AR

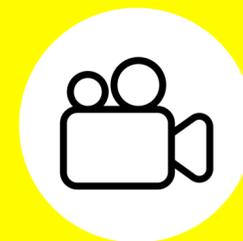
69% engage with brands through social profiles to show their loyalty



SOCIAL

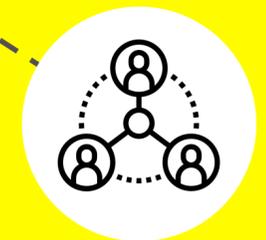
BRANDS

VIDEO



93% feel that vertical video is more personal

COMMUNITY



60% have connected with others over brands they like

2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519 | Q: How much do you agree with the following statements about Augmented Reality (AR) in general? | Q: How do you typically show loyalty to brands you like? (NET: I add / follow them on social / messaging / camera apps to view their content, I engage with the brand on social / messaging / camera apps (e.g. react / like / comment on their content, re-share their content, etc), I share the brand's content on social / messaging / camera apps; NET: I talk about the brand with my friends and family, I like to connect with other people who share my love for the brand (e.g. social groups on apps))
2021 NRG study commissioned by Snap Inc. | Base: Total KSA (n=1011) | Q: Below are some statements that reflect a variety of opinions. How much do you agree or disagree with each?





When building connections, brands should consider these key aspects...how do we build authentic connections?

Tips for brands...



Aligning values

It's more important than ever for people and brands' values to align. Snapchatters want to buy into brands they can support, promote and stand by. To achieve this, brands need to be open, honest and clear with their goals, motivations and values.



Building communities

Brands can look to share happiness by facilitating connections through communities. Snapchatters enjoy talking to people who share their love for a brand, as this also indicates shared personal values.



So...what does this all mean?



When it comes to their identity, Snapchatters are embracing their true selves - vulnerabilities and all. They seek freedom in which to do this, and Snapchat provides a positive space for exactly that.



For Snapchatters, interaction is vitally important, regardless of how far apart they may be. Visual communication lies at the heart of their interaction, providing the ability to build deeper relationships.



Commerce is changing. Snapchatters are having fun and experimenting with their looks, and to do so, they're leaning into the immersive shopping tools Snapchat has to offer.



Snapchatters are prioritizing the greater good and building community. In doing so, they're recognising the benefits their connections - with family, friends and brands - can bring.

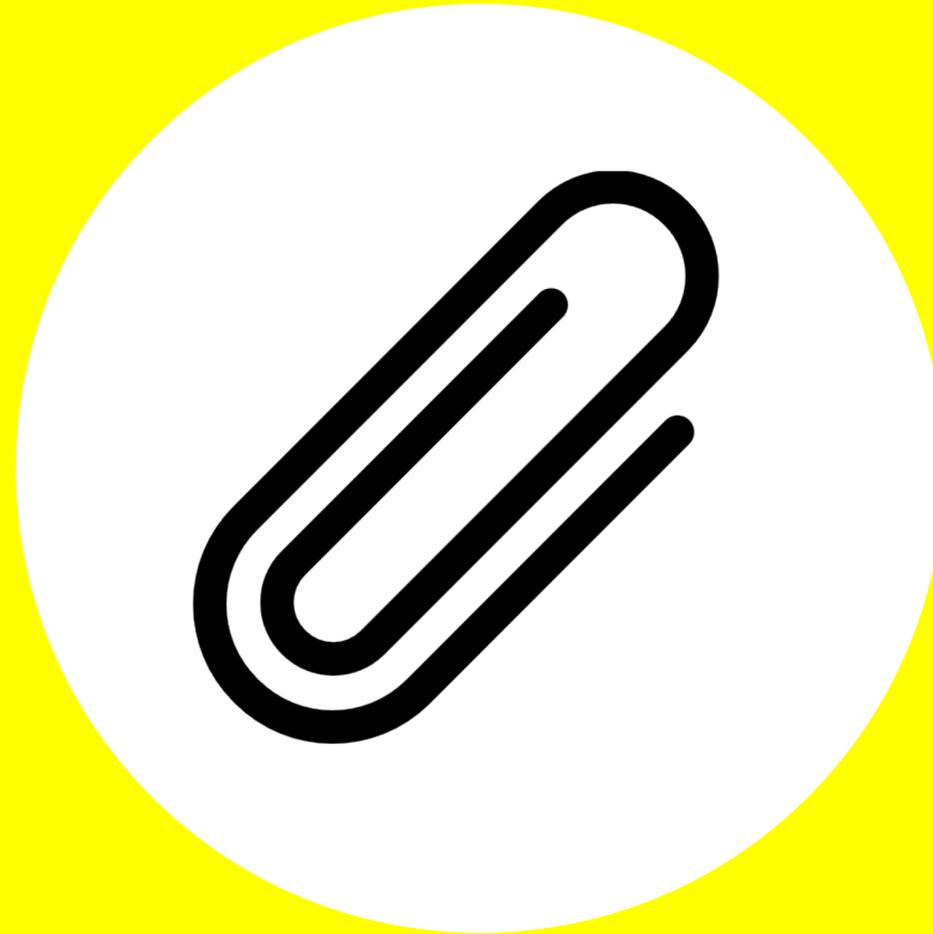




Thank you



Appendix



Methodology

Quantitative online survey

- Crowd DNA ran a 15 minute online survey among a sample of 19,551 respondents in 16 countries: **Australia, Brazil, Canada, France, Germany, India, Italy, Mexico, Netherlands, Norway, Saudi Arabia, Spain, Sweden, United Arab Emirates, United Kingdom, United States.**
- The quantitative element was in field between 5th November and 26th November 2021.
- All respondents were aged between 13-44 years old, had to own a smartphone and be a user of at least one social / messaging / camera app.
- 13-17 year olds were recruited through their parents or guardian
- An initial 1,000 respondents were recruited per market based on nationally representative quotas (based on secondary research) placed on age, gender, region and ethnicity to ensure a nationally representative numbers.
- A min. of 500 daily Snapchat users were recruited per market, either through natural fallout or through an additional boost.
- Additional quotas were placed on age, to ensure a min. of 133 per group (13-17, 18-24, 25-44).
- During analysis, age and gender weighting was placed on Snapchat users to ensure the distribution matched that of the exact in-market usage distribution. Non-Snapchat users were assigned a weight of 1.

Qualitative interviews

- 2 leading edge members of the Snapchat Generation in each of the 16 countries completed week-long vlogging diaries to deliver depth and emotion.
- They were also asked to include friends in these tasks, upping our sample size and extending the number of perspectives to draw from for the research.

Alignment with experts

- We spoke to 4 experts in the field to round out our knowledge base:
 - Ioana Literat - *Gen Alpha & Gen Z Tech Expert, USA*
 - Derek E. Baird - *Kids & Teen Content, Culture Strategist, Global*
 - Dr. Damian Radliffe - *Professor of Journalism & MENA Studies, UAE / Saudi Arabia*
 - Mark McCrindle - *Social Researcher & Futurist, Australia / Global*



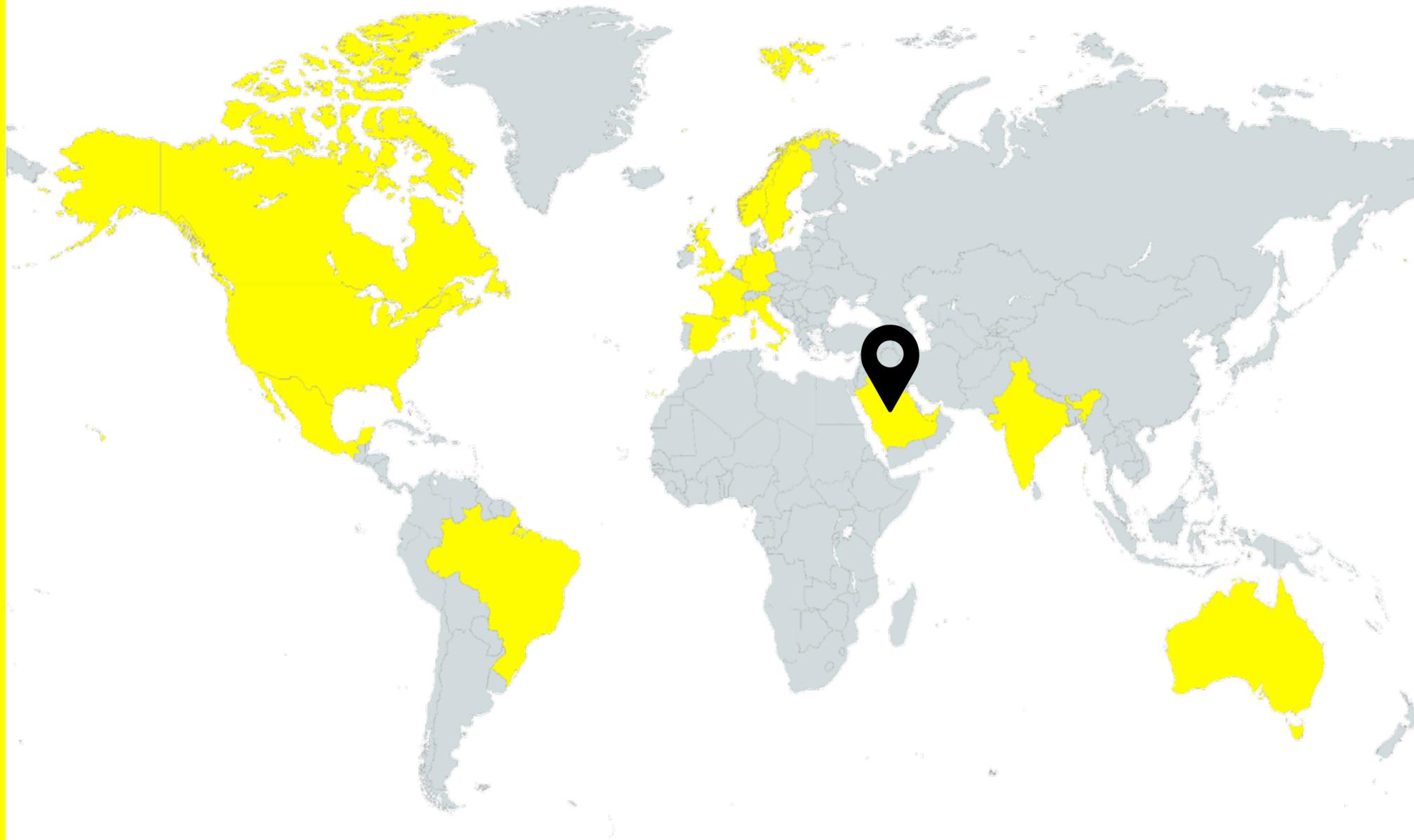
How does Saudi Arabia differ from the global narrative?

The findings in this report closely align with the story and data presented in the Global Snapchat Generation report.

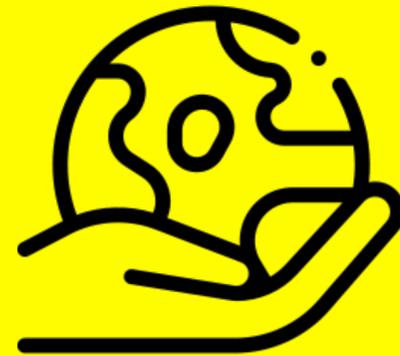
Themes within identity, communication, commerce and connection show the same movement as the global general trends.

In Saudi Arabia, these themes are potentially coming through even stronger. Snapchat feels highly differentiated from other platforms, as it provides a safe, judgment-free environment that encourages intimate communication.

Authentic connections live here and Snapchatters are able to share their opinions and learn about other views. They broaden their outlook and explore their identity with others, and seek a similar experience when it comes to brands.



Looking outwards, the Snapchat Generation wants to build a better future



71%

of Snapchatters say they feel a personal responsibility to **make the world a better place**

Top five important issues in KSA (vs global)

40%

Poverty (↑3%)

36%

Wars around the world (↑13%)

31%

Discrimination against race / ethnicity (↑3%)

31%

Access to education (↑8%)

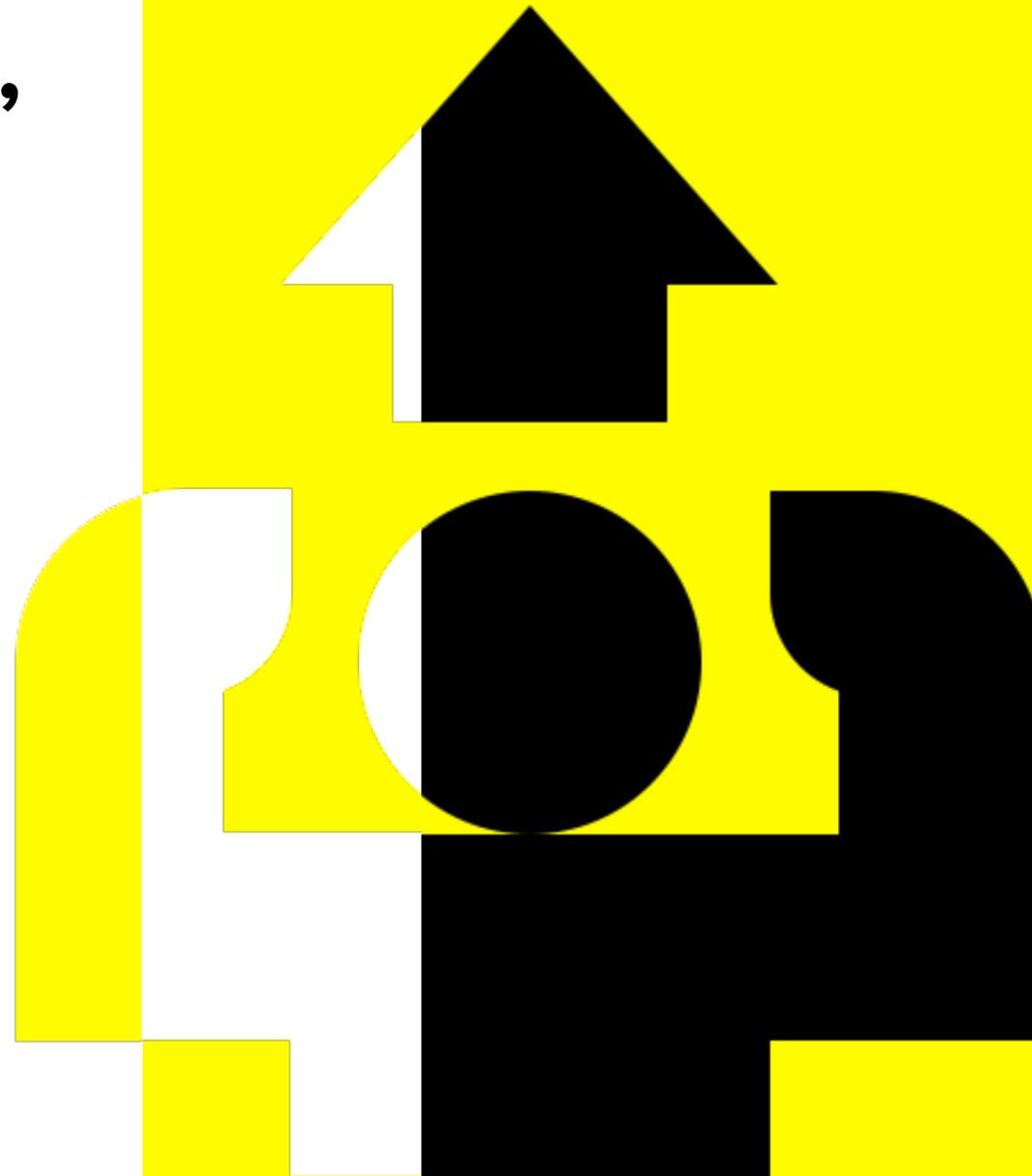
30%

Crime and violence (↓12%)

2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Base: Saudi Arabia Snapchatters N = 519 | Q: Please tell us the extent to which you agree or disagree with the following statements about your feelings and emotions. Q: Which of the following issues are most important to you?



While the past two years have been challenging, Snapchatters are resilient



63%

of Snapchatters feel they get stronger and grow from challenges

2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters N = 519
| Q: We're going to present you with a set of statements. For each pair, please use the scale to answer which you agree with most



AR empowers experimentation

Snapchatters who “like to experiment and change aspects of my look / appearance” are:

1.6x

more likely to see / try on products virtually before I buy

1.6x

more likely to want brands that offer **immersive shopping experiences** (e.g. using AR)



2022 Global Crowd DNA Study commissioned by Snap Inc. | Base: Saudi Arabia Snapchatters who agree “I like to experiment and change aspects of their look / appearance” N = 286. Do not agree N = 233 | Q: Now, thinking about the way you shop, which of the following do you do more of now compared to before the pandemic? Please select all that apply. | Q: Now thinking more generally - compared to before the pandemic, which of the following have become more important to you when choosing brands to purchase products from? Please select all that apply.