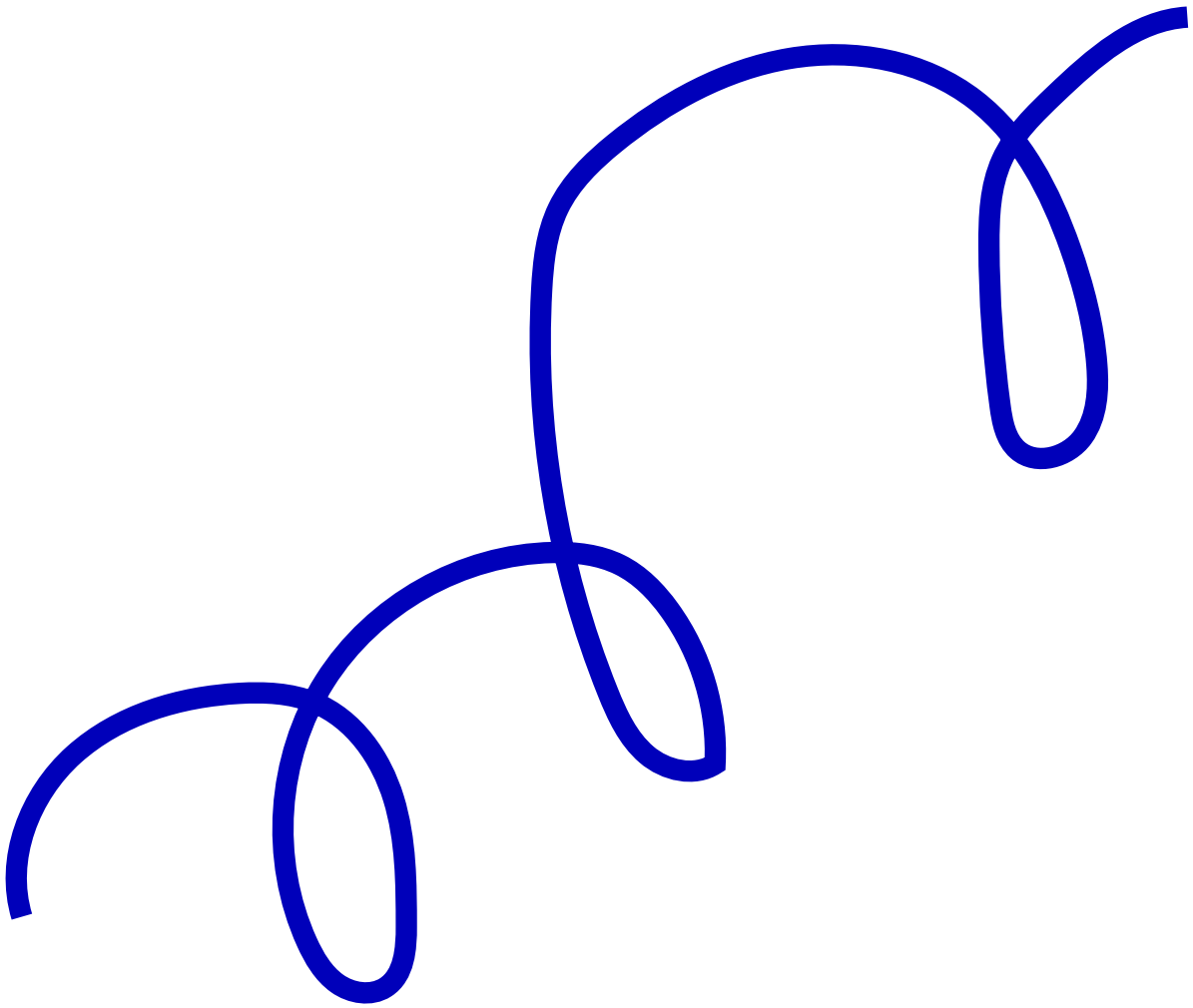
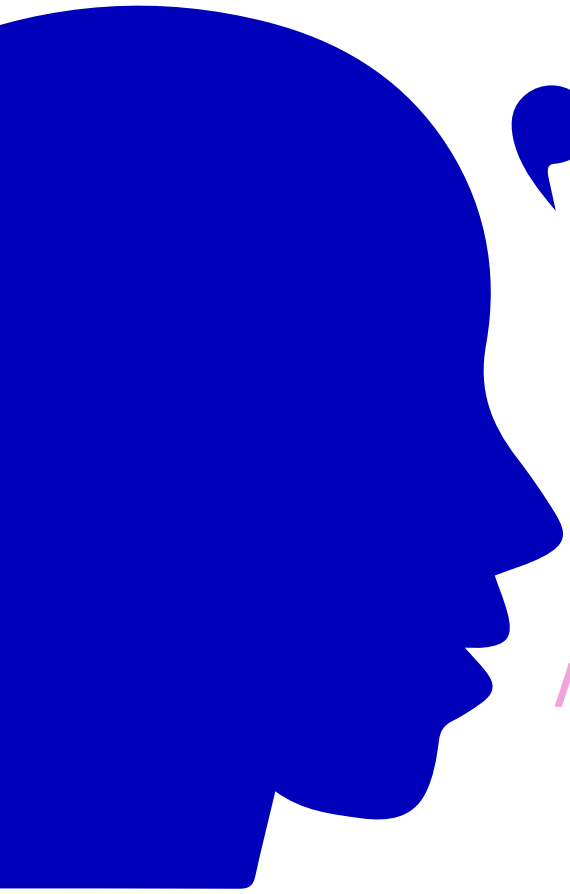
THE STATE OF GEN-Z IN TURKEY,



USERVISION

Gen-Z Comments



'Now I know the motivation behind my actions.'

'OMG, This is so ME!'

'Just like reading my horoscope. Most of the content applies directly to my life.'

'There are some areas that I would disagree on, but I am surprised that someone is actually trying to understand our motivations'



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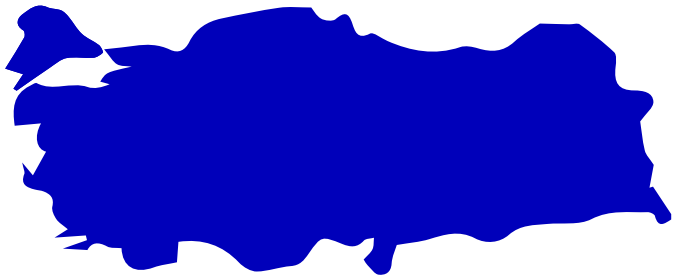
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Preface;

Why is Gen-Z important?



Gen-Z are no longer future customers or future coworkers. They are joining the workforce and have perhaps more buying power than their predecessors. Gen-Y lived in a world where major socio-economic shifts happened, and leveraging the internet, Gen-Z are able to learn all about any subject in an instant. Gen-Z were born in the internet era, so they don't know a world without the internet. They are the true children of the information-age and have great potential to make an impact.



Why is Gen-Z in Turkey important?

Turkey is a unique amalgamation of east and west. It is easier to reveal what is important among habits and patterns, through comparisons and contrasts. Turkey has one of the top 20 highest GDPs and a tremendous youth population, which is very connected.

Why Uservision?

It has occurred to us that there is a myriad of reports about Gen-Z. However, these reports seldomly explain the world through the eyes of Gen-Z. Although most reports are very accurate about what Gen-Z do, they often omit why they act in a certain way. The why, and the implicit nuances, make all the difference when understanding Gen-Z. It was also surprising to see that so little has been written about Gen-Z in Turkey.

Preface;

About our Insights

As Uservision we have conducted circa 500 in-depth interviews with high school and university students. Additionally we have conducted diary studies with 50 students to understand their daily lives and deep dived into their consumption habits, retail spending, app usage, financial inclusion and many more topics.

We acquired knowledge on Gen-Z through our primary research, secondary research and partner networks. We conducted netnography studies to understand their culture through social media, dating apps, forums and other platforms.



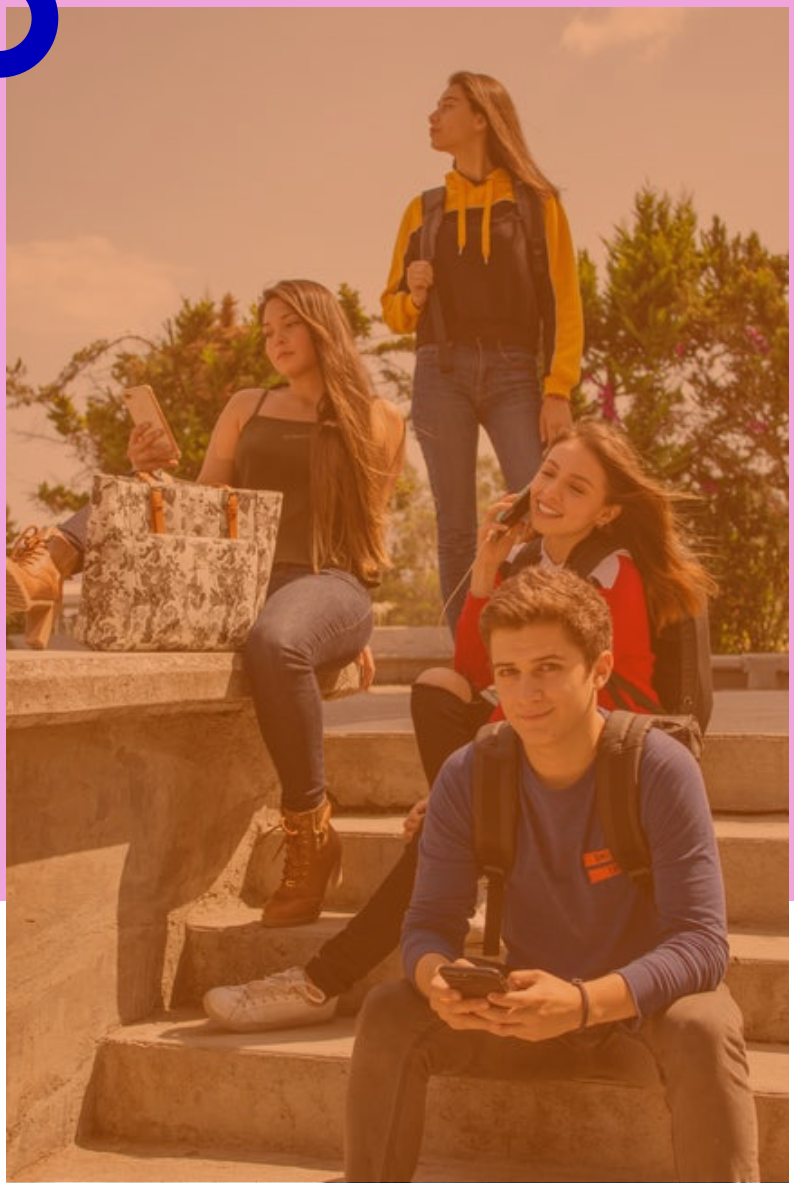
Onboarding Gen-Z'ers As Co-Creators

After creating the report, we have onboarded Gen-Z'ers and explained our purpose through creating such a report. We hired 15 Gen-Z'ers, studying sociology, psychology, software, physics and management to fine tune our insights as stakeholders.

OUR PURPOSE:

Through this report and by understanding Gen-Z's perception of the world, we aim to bridge the gap between Gen-Z and its predecessors.

Who is Gen-Z?



Birth Years: 1997-2010

Currently Aged: 10-23 Years Old.

Global Generation Size: Roughly 25%-32% of the world population.

Generation Firsts: The average Gen Zer received their first mobile phone at the age of 10.3. Many of them grew up playing with their parents' mobile phones or tablets. They have grown up in a hyper-connected world. On average, they spend 3 hours a day on their mobile devices. They are the first generation that has never known a world without the worldwide web, social and connected world. They were born in a world where smartphones are an extension of people.

Distinctive Gen-Z Traits

Listening to different music genres was one of the most defining elements for Gen-Y and Gen-X. In contrast, music in today's era is a mixture of very different genres, hence defining yourself with a single genre would be restrictive. Gen-Z'ers exhibit a mixture of different characteristics to define themselves. Below are several global themes which are very different than their predecessors:

Twitch

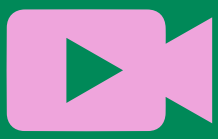
Despite their predecessors perception, video games deemed as cool by many Gen-Z'ers. They promote their own Twitch channels, where they share their gameplay.

Activism



Some Gen-Z'ers create their identity through giving back and changing the world. Considering being nice is the new "cool", activism is the ultimate cool factor.

TikTok Youtube



Gen-Z is all about video content that is quickly digestable. Where TikTok is utilized for quick injection of fun and culture, Youtube provides more in-depth and nuanced content over everything.

Adventure & Experience



Collecting experiences and adventures (and of course photo justifying them) are more important to Gen-Z'ers than owning 'stuff.' This is also a prominant theme for Gen-Z.

Entrepreneurship



As there aren't many opportunities for Gen-Z to utilize their multidisciplinary skills, some Gen-Z'ers feel obligated to create something new to fit in.

LGBTQIA+



Some Gen-Z'ers create their identity through giving back and changing the world. Considering being nice becoming the new 'cool', activism is the ultimate cool factor.

USERVISION
INSIGHTS

USERVISION

Banking & Financials

DEBT

During our research we realized that in contrast to their predecessors, Gen-Zers avoid debt and try to live within their means. They have learned from all the bad experiences of former generations and don't want to be associated with the hurdle of debt. Hence, they are not very fond of using a credit card or getting a loan.

BANKING

Until higher education, they don't prefer to have a relationship with banks without a concrete reason. In high school, they prefer to work with up and coming start-ups such as Papara* and İninal** to proceed with their payment needs.

Papara: Easy to use payment solution targeting younger generation. Provides discounts on games, online shopping and for various lifestyle brands. Also popular with cryptocurrency traders.

***İninal: Debit card that you can buy from a market. Provides discounts on games, online shopping and for various lifestyle brands.*

Banking & Financials

STARTING A RELATIONSHIP WITH FINANCIAL INSTITUTIONS

In university, they realize that they need a financial institution to mediate payments, get stipends/grants, pay online or receive a salary. Although conspicuous consumption is not a status symbol nowadays, they can apply for loans and credits for indispensable goods (such as a smartphone or motorcycle for transportation).

PRAGMATIC

When they are choosing a financial institution, they research and make the most pragmatic decision or they proceed with their parents' bank to defer the responsibility of choice. By pragmatic decision, we are referring to advantages, promotions and top-of-mind brand awareness.

FINANCIAL FLUENCY

They have a strong appetite for financial education and are opening savings accounts at younger ages than prior generations, if they have the monetary power.

Lifestyle

It has come to our attention that after high school, there is a significant drop in team sports and engaging with sports related activities overall. Sports are very important as they lead to a more organized, more disciplined and healthier life. Understanding Gen-Z's perception towards sports helps us understand how they perceive life. Some of the reasons why Gen-Z's drop sports from their life are:

RESPONSIBILITY

Participating in team sports is a responsibility, and that is something Gen-Zers avoid very passionately. They don't want to be cared for or taken care of as much as their predecessors.

COMMITMENT

Team sports require commitment and instead of committing, Gen-Z are more fond of spontaneous activities.

THE FALLACY OF ALWAYS BEING BUSY

Gen-Z are always busy with something, mostly with activities that come up spontaneously, thus they think they are too busy to squeeze any other activities into their schedule, although they create their own busy schedule.

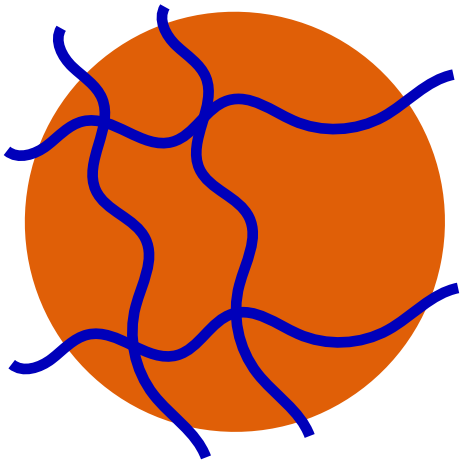
AUTHORITY FIGURE

They need an authority figure to tell them the right things to do, as they don't want to take responsibility.

Sports

In highschool, students have more opportunities to gather spontaneously and have fewer responsibilities. They have a fixed schedule and have to be successful at only this fixed schedule.

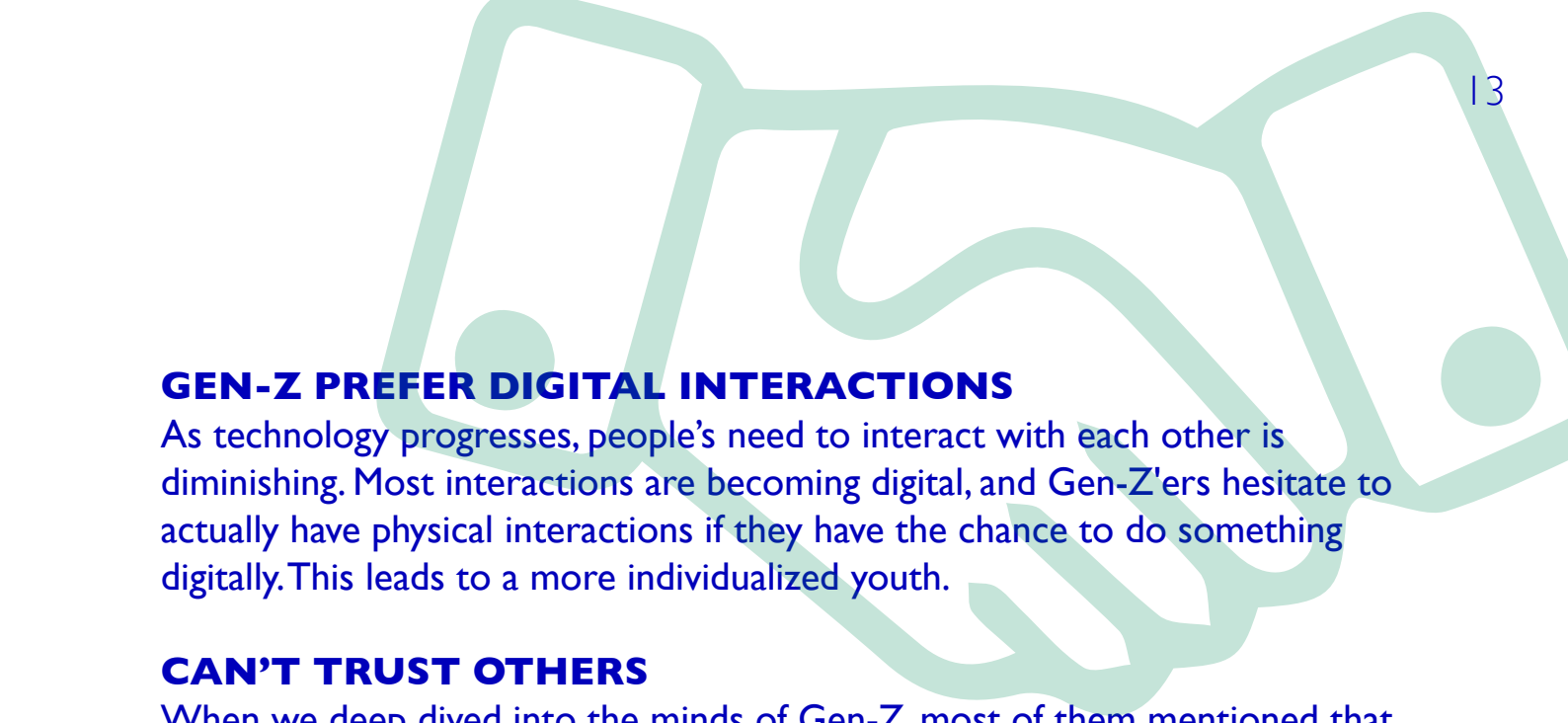
However at university, the limits are blurry. There are infinite opportunities to be successful. Additionally, families push their children in a very competitive way to focus on their studies. This attitude puts pressure on Gen-Z'ers, whilst committing to non-academic activities.



Further, a combination of drug use, the constant need for socializing and fear of missing out drives Gen-Z to more collective activities that are not sports.

Social media nudges Gen-Zers who are relatively more fit and athletic to start sports and keep their form. On the other hand, it sometimes affects others negatively.

Among young women, sports evoke an old fashioned & uncool feeling. More and more women are affected by the rising trend of wellness and mindfulness, hence they are interested in either more social activities, or wellness. They are trying to grasp the world in a more self-aware perspective. Their awareness also may lead to a healthier way of living, a better diet and working out.



GEN-Z PREFER DIGITAL INTERACTIONS

As technology progresses, people's need to interact with each other is diminishing. Most interactions are becoming digital, and Gen-Z'ers hesitate to actually have physical interactions if they have the chance to do something digitally. This leads to a more individualized youth.

CAN'T TRUST OTHERS

When we deep dived into the minds of Gen-Z, most of them mentioned that they have a close circle of friends, whom they trust; but outside of this circle, they have major trust issues. Every superficial relationship and friendship that they have is an opportunity for backstabbing.

TRUST ON OTHER MEDIUMS

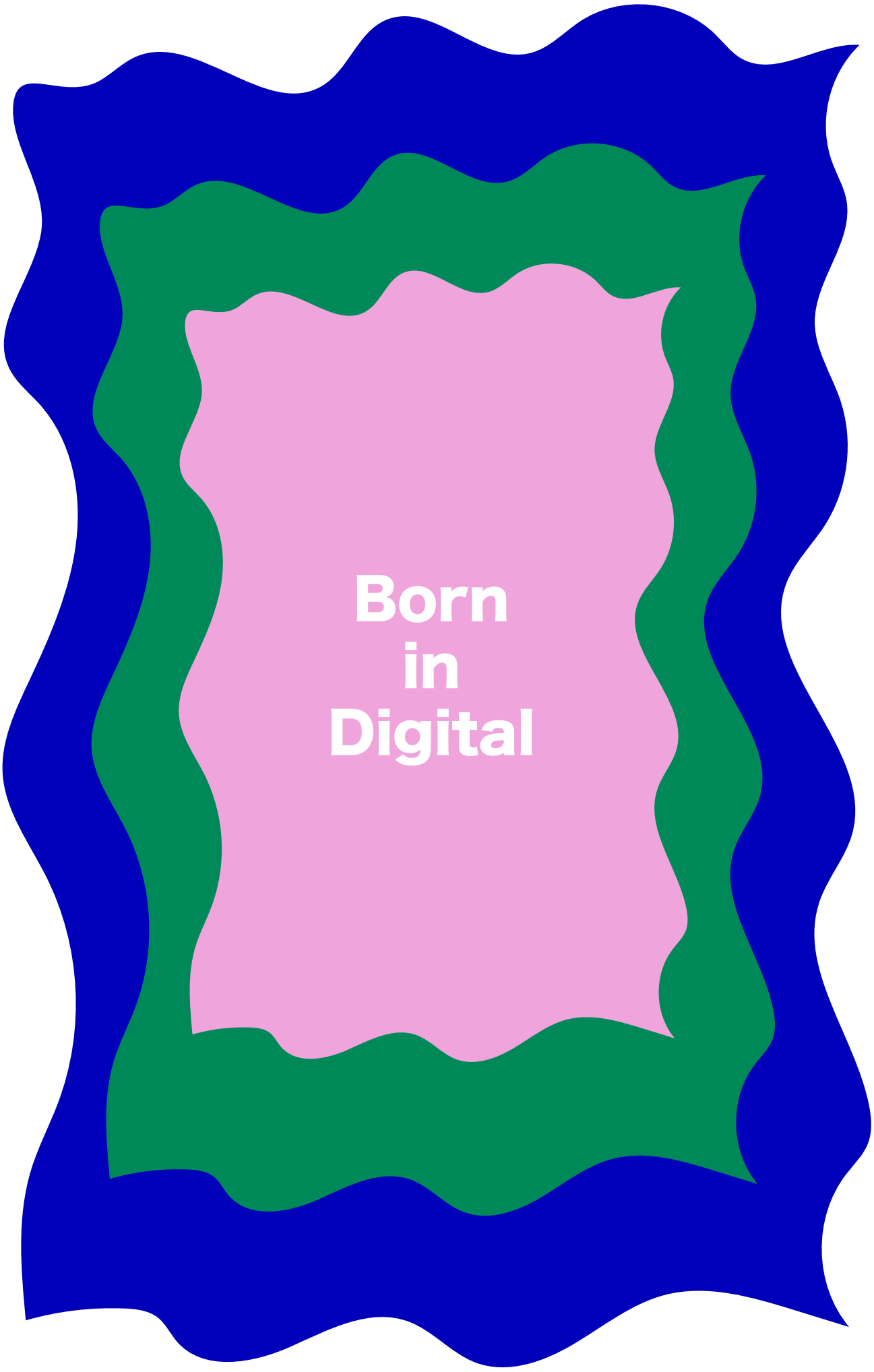
As they have no other chance to gather genuine information, they either trust, or justify an action through other people on social media and the internet, especially ones with a similar lifestyle and world view.

It is also important to note that, Gen-Z approaches everything in a very skeptical way. One of their key phrases is: 'bu kesin yaşanmıştır' which translates to 'oh yeah that really happened'. This is similar to 'pics or it didn't happen'

BONDING WITH NATURE AND ANIMALS

As Gen-Zers are less interested in people, they get kindness and warmth from nature and animals. Two sources they can always trust.

Trust & Interactions



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EASILY DISTINGUISH WHAT IS FAKE

This generation is born in the digital era. They don't know a world without the internet. Everything is already connected for them. Considering this fact, they are able to immediately discern ads, inauthenticity and fake communication efforts.

NOT INFLUENCED BY INFLUENCERS

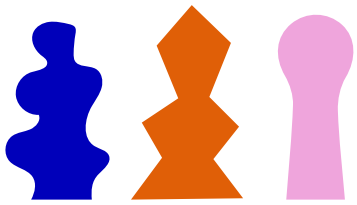
Considering this, they have mentioned that they are not very moved by influencers. Of course working with an influencer increases brand awareness, however, they know that influencers are getting paid to market products and they consider this effort to be very insincere.

HAVING A DIGITAL PRESENCE IS THE BARE MINIMUM

They are more into experiences and personalization, so simply making an application or having a digital presence is not enough for them, that's the bare minimum.

PERSONALIZATION IS THE KEY

Global tech companies like Facebook, Spotify or Netflix hyper personalize and customize their offerings according to their audiences' needs and leveraging AI. Most Gen-Zers have access to these global offerings. Thus, Turkish brands often compete globally when trying to capture the attention of a Gen-Z.

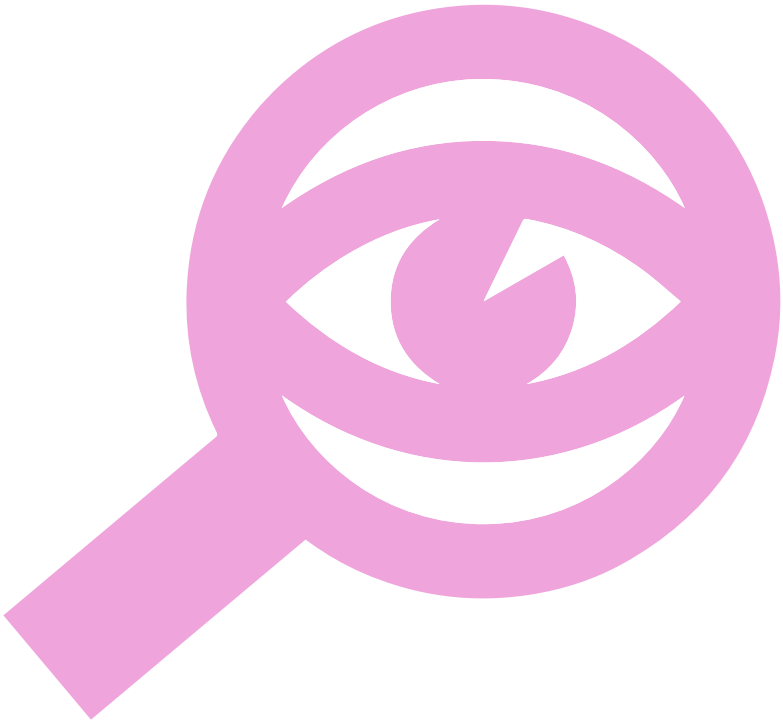


Born In Digital

SOCIAL PRESENCE

TikTok, YouTube, Instagram, and Discord are in. Twitter and Facebook are out, but I am sure you already know that.
Most Gen-Z's have several different Instagram accounts to share different facets of their personalities with different social circles.

Have you seen any Gen-Zers covering up their webcams with a band-aid or with anything else? This is because they like AI, targeted offers and are not afraid to share their data. Compared to millennials, they are not afraid of someone spying on them. Because 'why the heck should they?'





USERVISION

CAREER IS ONE OF THE FACTORS THAT DEFINE WHO THEY ARE

A career is more important to Gen-Z'ers than former generations. Where former generations see their career as a means to live, for Gen-Z'ers it's how they identify themselves. They want to be a part of something meaningful and take pride in what they do. Work-life balance, flexible hours, perks and benefits are equally important as pay.

ACKNOWLEDGING THAT IT IS HARD TO CHANGE SOCIOECONOMIC STATUS

Especially lower income Gen-Z's acknowledge that they need to work very hard and get out of their comfort zone to increase their socioeconomic status, however this is not of importance to them. They try to be happy and live a peaceful life within their own boundaries. The growing wealth gap and rise in non-discretionary expenses, such as housing, transportation, food and healthcare play a significant role in the hopelessness of Gen-Z to become more financially well endowed.

ENTREPRENEURSHIP IS A CAREER PATH

Entrepreneurship is a big deal among Gen-Z. It is hard to generalize a career path for a whole generation, but they feel compelled to create something new combining different disciplines that they possess. Having heroes and pop culture icons revolving around tech moguls nowadays, greatly influenced entrepreneurship.

Career Oriented

WORK-LIFE BALANCE

Gen-Z are well aware that they will spend a lot of time on their job in the future and won't hesitate to invest in meaningful, career oriented activities. Most of them mention that a career is very important for them. Although financial prosperity is desirable, their priority is having a laid-back career that fits their lifestyle.

MULTIDISCIPLINARY TALENTS

Gen-Z are all about experience. The more experience and talents they have (to exhibit on different platforms), the more socially accepted and empowered they are.

This phenomenon has implications for their careers. They don't want to grow vertically and master a discipline, but mix and match several different disciplines. They want to use these different disciplines and skills for their work and get paid accordingly. Seemingly unnecessary rules of ancient eras are not for them. They need pragmatic explanations for the de facto standards of work (and society).

EXPECTING GUIDANCE

Further, they are very fond of strong and pragmatic authority that guides and leads them through hardships.

Career Oriented

Growing Up

Gen-Z have to learn much more than their predecessors to be relevant and competitive; however, they also need to get out of their comfort zone less and less. Most of their paths are already paved. In a world which is more user centric, they are very accustomed to stuff getting done by others. They like to defer responsibilities and it takes more time for them to internalize growing up and taking on responsibilities.

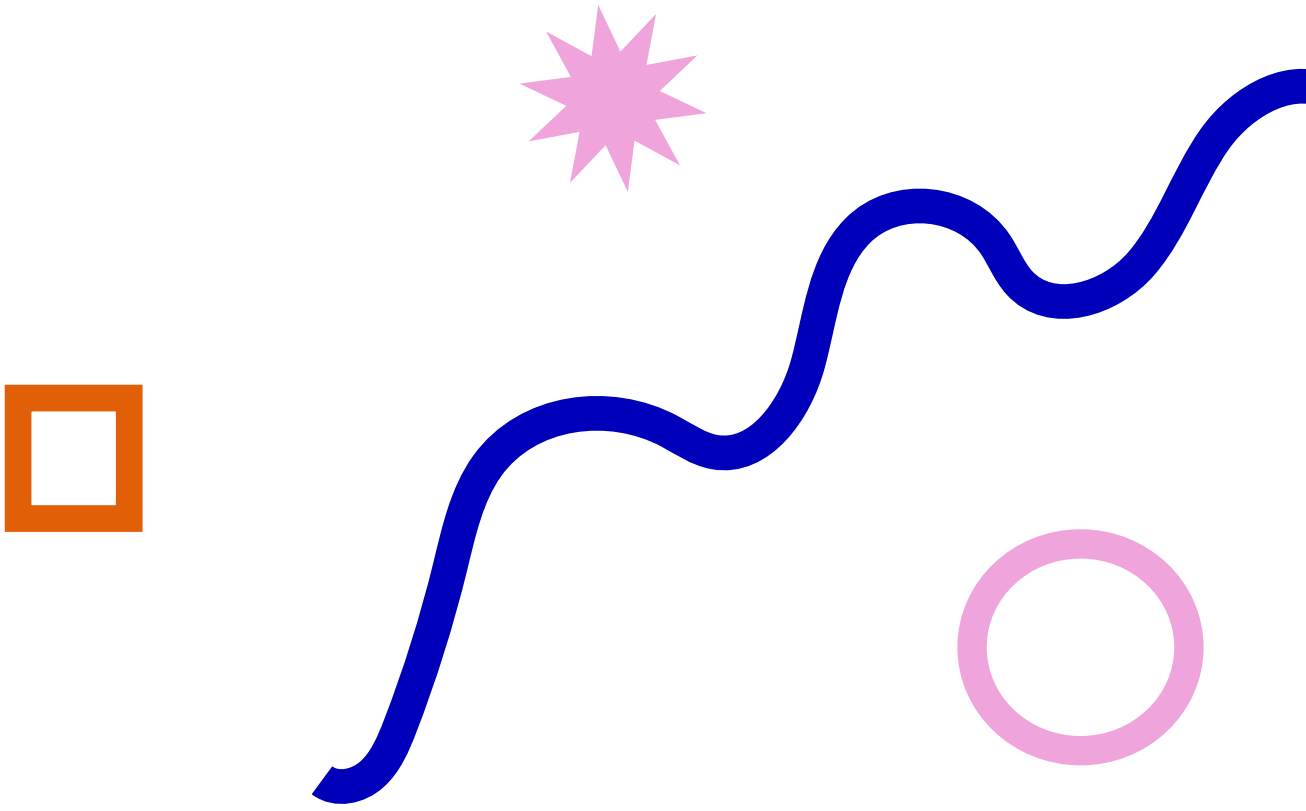
Working hard and hustling is socially accepted with Gen-Z, yet these attributes are not an indication of maturity or being responsible.

Kegan's Theory of Adult Development emphasizes five stages of adult development. To become a high functioning adult, individuals should transform the way they know and understand the world. Rigid assumptions about who you are and how you define yourself with what you have transforms to acceptance of a true self which is comprised of many different layers. With social media creating a façade of different socially constructed identities, it is harder for Gen-Z to detach from these all-embracing ideas and find the sweet spot between who you are and what you have.

Spontaneous Living

LIVING SPONTANEOUSLY

Gen-Z's have to know, learn, and interact with a much more complicated life than it was many years ago. To make room for this, Gen-Z's try to decrease their responsibilities and commitments as much as possible, hence they live spontaneously to decrease the cognitive load of the world. They find it hard to commit as they don't want to take responsibility for others in life.



Taking Responsibility

DON'T KNOW WHERE TO START WITHOUT PROPER GUIDANCE

Gen-Z don't know where to start when they are engaging with a new occupation (whether it is sports, a new business idea or arts). They don't have proper guidance and their predecessors are from a different era. Their predecessors don't understand technology themselves nor are nimble enough. The education system is also little to no help, when it comes to guiding Gen-Z through current challenges. Without having guidance and deferring responsibility to an authority figure, they don't start anything, or even if they start, when they face obstacles, they realize how hard it is to overcome all of them without having a backup. Or, they are afraid of not overcoming at least one, and hence they quit very early, in order to avoid wasting presumably unnecessary effort.

SOFTWARE DEVELOPMENT AS AN EXCEPTION

Software development is a crucial skill in today's world, as it emphasizes strategic and systematic thinking. It is also intrinsically all about finding your path in a world of unknowns. Furthermore, when you actually create something, you pass through the most important part. You actually start. And after the start, it is easier for a Gen-Zer to convince themselves to grow on that path, due to sunk cost.

Sex and Sexuality

DIVERSITY

The LGBTQI+ movement is rising all over the world and although there is a considerable conservative population in Turkey, LGBTQI+ activism is celebrated in today's world.
Furthermore, women empowerment in pop culture (in TV series and movies) and the liberation of sex also leads to sex being less of a taboo.

SEXUALITY

Sex and sexuality is also becoming less of a taboo in Turkey, where Tinder, Instagram, and other dating/social apps have paved the way of normalization. It is easier for people to meet and refine their matches digitally and build relationships upon digital personas.
It is also often the case that for older generations, photos on Instagram or videos on TikTok could seem more sexual and revealing, but for Gen-Z, that's the new normal.

Social Norms

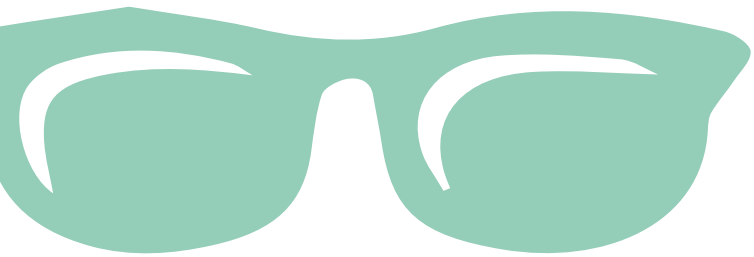
BEING COOL

Being cool is all about the experiences and talents a person possesses, hence traveling is the ultimate status symbol. Being creative, independent, fun and talented is desirable, but being genuine, having values (treating people equally, acting ethically) is a must. Consequently, traditional bullies are not relevant in our society and not deemed as cool. Gen-Z are fed up with all the faults and misconduct of former generations, thus equality and justice is important for them. Therefore LGBTQI+ and animal rights movements are amplified in this era. Basically 'being nice' is the new cool. Even the conservative part of Turkey, mentions that LGBTQI+ rights are important.

EMPATHY

One of the reasons for the aforementioned phenomenon is the rise of social media. Instead of acquiring news from third party sources in a very standardized way, Gen-Zers can learn about all the world's problems firsthand, in a more genuine way and without sugarcoating. Hence, they can actually empathize!

One discrepancy to mention here is that, bullying, injustice and being rude is still popularized on TV and media in Turkey. Gen-Z's have mixed feelings about these shows.



Brand Loyalty

LOYALTY

Gen-Z is not loyal to brands and they often don't identify themselves with brands. Nevertheless certain brands are integrated so deeply into their lifestyle that these brands become parts of that lifestyle.

DISCOUNTS

Gen-Z is also not fond of following discounts, promotions and loyalty programs. It is just too much hassle and drama to follow through. Instead, they often go directly to offers that are always cost-effective.
Long-term offers or serious discounts evidently influence Gen-Z's, considering their pragmatic and informed way of living, yet they are no coupon hoarder. Although discounts don't play a huge role in Gen-Z'ers life, they still feel obligated to benefit from them due to a lack of financial power.

WHAT CLICKS?

Intellectually stimulating and fun content is relevant to the young generation. Flashy colours and distinctive messages work quite well.

Drug Use

Alcohol is getting more and more expensive in Turkey. As a substitute, there is a drug for every price point and there is an increase of drug consumption compared to earlier generations, as it is a way cheaper substitute for alcohol. Furthermore, 'drug culture' is also considered normal for this generation. Sex and drugs are cheap and convenient ways to have fun in a world that is getting gradually more expensive and cumbersome.



Relationship with Older Generations

Gen-Z's in the US are making fun of millenials by roasting their love of Harry Potter, coffee addiction, and feelings of nostalgia In Turkey, Gen-Z's are not explicitly making as much fun of older generations, as it is still a cultural taboo to blatantly make fun of a former generation. Older persons have been positioned as 'older brothers/sisters', meaning authority figures in Turkey's collective memory. However, interactions with one another is a different story. That is the time to criticize everything.

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Uservision helps brands to capture, analyze and reuse agile qualitative data, leveraging AI to create a human insight library.

Uservision helps brands to empathize with their customers. We provide a platform where agencies and brands could quickly reach their target audience and capture agile qualitative insights leveraging AI. We tag these insights and store them in a searchable 'human insight library', so that it can be deepened or reused.

Uservision provides both contemporary research services, but also provides the software, so that brands could conduct their own research at ease.

Uservision's technology allows agile qualitative research and human-centered research, published new generation methodologies to make sense of our era.

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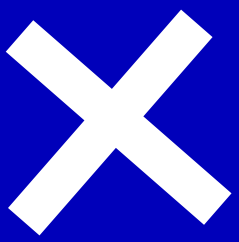
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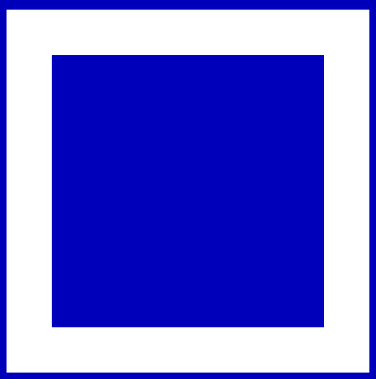
GEN-Z STAKEHOLDERS

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Deniz A.
Elif T.
Alara A.
Nil Y.
Funda A. Kavun
Alp Can B.
Tuba K.
Şeyma B.
Kübra T.
Neslihan S.
Yasemin Y.
Okan Ş.

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THE STATE OF GEN-Z IN TURKEY.



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