

# WHAT GEN Z WANTS THIS HOLIDAY SEASON

The only data-driven gift guide informed by Gen Z's unique tastes and interests, powered by Qloo's Insights tool

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#### INTRODUCTION

## **OVERVIEW**

ith the 2024 holiday season quickly approaching, brands and retailers face a unique challenge: catering to the most digitally-savvy, socially-conscious, and value-driven generation yet—<u>Generation Z</u>. Born roughly between 1997 and 2012, this group-now aged 12 to 27—is reshaping the retail landscape with their unique preferences and demands. With purchasing power estimated to reach \$12 trillion by 2030, Gen Z is rapidly influencing not only the broader retail space but also the way businesses engage with consumers as a whole. From demanding sustainable products and ethical companies to prioritizing personalization and individuality, their shopping decisions reflect a deep alignment with their values. This generation isn't just interested in what a brand does—they care deeply about what it represents, and they avoid those that don't align with their principles. Their expectations extend beyond quality and aesthetics to include a brand's stance on issues such as social justice, climate consciousness, and inclusivity.

More than any previous generation, Gen Z's purchasing behaviors are <u>driven by purpose</u>. They care deeply about mental health and environmental sustainability, which shape their relationships with brands. As digital natives, they are also heavily influenced by online culture, social media, and peer recommendations. This gives them the unique ability to set trends that ripple across generations. While Millennials may have <u>set the stage</u> for a more conscious consumer culture, Gen Z is taking it to new heights, using their dollars to drive change and hold brands accountable.

Oloo's Insights platform is a powerful audience analytics tool for navigating Gen Z's evolving preferences, offering brands the ability to craft strategies backed by data that resonate with this diverse and value-driven generation. With Oloo's intuitive insights platform, businesses can uncover the unique tastes, behaviors, and interests of Gen Z across categories like fashion, entertainment, music, and dining. This data-driven approach enables companies to understand not just what Gen Z is purchasing, but why—allowing them to align their offerings with the causes and communities that matter most to this generation.









# IN THIS REPORT

loo's audience intelligence tool, Insights, has revealed detailed taste profiles for three audience segments that highlight the key trends shaping Gen Z's values and interests: the Changemakers, the Self-Care Seekers, and the Social Gamers. For each of these groups, we have identified the top brands that resonate most with their unique preferences and lifestyles. This comprehensive report provides a deeper understanding of Gen Z's diverse tastes, offering actionable insights for businesses aiming to connect with these dynamic, values-driven consumers.



**METHODOLOGY** 

### TASTE AI

Oloo's **Taste AI** analyzes anonymized user interactions and content metadata to provide cross-domain recommendations that reflect customers' broader tastes and values. It uses three types of embeddings—taste-based, content-based, and hybrid—to map relationships between entities like movies, restaurants, or products, allowing it to suggest experiences across different categories. Taste AI operates without processing any Personally Identifiable Information (PII). Its adaptable system learns from user behavior, offering audience intelligence that evolves with changing preferences while maintaining a flexible, privacy-first approach.

The insights contained within this report were derived from Qloo's Taste Al engine. Specifically, 97,057,934,642 unique data points and signals were analyzed for this report. The data was pulled on September 12, 2024, at 2:09 pm EST.

# **KEY METRICS**

Oloo's **Affinity Score** measures how closely one item is related to another. Said differently, it gauges the strength of the correlation between any given input—such as a demographic profile, a specific interest, or a geographic location—to any notable person, place, thing, or interest. This relationship is quantified with a score ranging from 0 to 100. A higher score indicates a stronger affinity, meaning that the input and output are highly connected and that the input is highly relevant to the output.





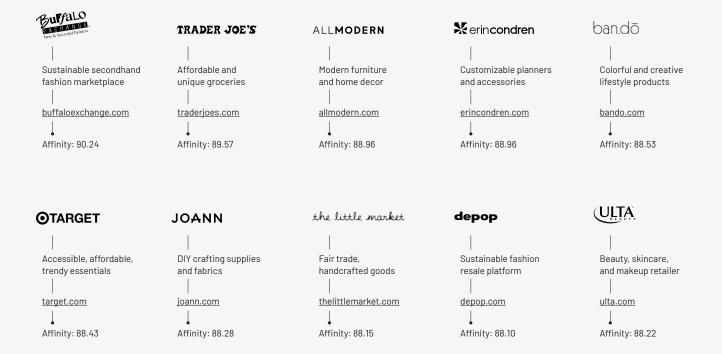
or Gen Z, every purchase is a vote for the future they want to create. Political and climate activism is deeply ingrained in this generation, with more than three-quarters reporting that addressing social and environmental issues is extremely important to them. Their activism is more than talk: over one-third of Gen Z have participated in political rallies, signed petitions, or supported movements in the past year, with many choosing to align their careers and purchasing decisions with companies that reflect their values. This generation is also <u>particularly concerned</u> with climate change, with 62% reporting anxiety over the issue, and many are willing to pay more for sustainable products that align with their environmental ideals.

The Changemakers represent these socially conscious consumers whose buying decisions are driven by purpose and a commitment to inclusivity, sustainability, and social justice.

This holiday season, they'll be looking for gifts that not only bring joy but also reflect their commitment to making a positive difference in the world.

### Changemakers x retail brands

What retail brands do socially conscious Gen Z consumers love most?





### Qloo's take:

Changemakers are always looking for ways to make a difference through their purchases. Buffalo Exchange and Depop are favorites for this segment, offering secondhand options that reduce waste and promote circular consumption. Trader Joe's and Target's dedication to diversity and affordable shopping make them key players for this socially-conscious segment. Meanwhile, The Little Market allows Changemakers to support global artisans through fair-trade practices.

### Changemakers x fashion brands

What fashion brands do socially conscious Gen Z consumers love most?

FREE PEOPLE

Bohemian, trendy,

effortless fashion

freepeople.com

Affinity: 85.43

RicherPoorer

richer-poorer.com

Affinity: 84.56

comfort-focused basics

Casual, stylish,

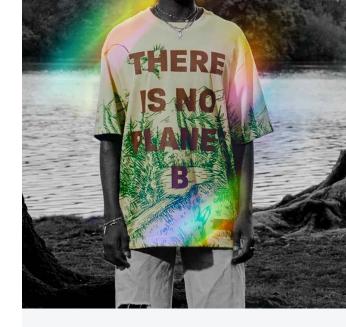












### No Planet B S/S Tee (Aspen)



\$47.00

Make a statement with Chnge's 100% organic cotton t-shirts—ethically made, sustainable streetwear that stands for more than just fashion.

### Qloo's take:

These fashion brands enable
Changemakers to align their
wardrobe with their mission to
create a better, more inclusive
world, proving that fashion can be
both stylish and responsible. Brands
like Aerie and Lively, known for
promoting body positivity and
inclusivity, have struck a chord with
this segment by breaking away from
traditional beauty standards, while
Chnge and Tentree have built their
reputations on sustainability, using
organic materials and planting trees
for every purchase.

### Changemakers x food and beverage brands

What food and beverage brands do socially conscious Gen Z consumers love most?























### **Traditional Mate Bags**



\$16.99

Treat your Changemaker to home-brewed comfort with Guayakí's loose-leaf yerba mate, available in convenient tea bags or traditional loose-leaf.

### Qloo's take:

When it comes to food and beverages, Changemakers are just as selective as they are with their fashion. Brands like Ben & Jerry's and Impossible Foods resonate deeply with this segment for their activism and commitment to issues like social justice and plant-based eating. Oatly and Guayakí also score highly, offering dairy alternatives and organic yerba mate in line with the eco-conscious values of Changemakers.

# A DIFFERENT PERSPECTIVE

hile many Changemakers lean into progressive values, there's a significant subset of Gen Z who are adopting more conservative principles. For this group, brands like Cabela's, Bass Pro Shops, and Dick's Sporting Goods resonate, signaling a focus on outdoor activities, self-reliance, and a lifestyle built around adventure and exploration.

For fashion and apparel, brands like Chubbies and 47 have strong appeal, with their laid-back, fun approach to casual wear and sports lifestyle gear. Southern Tide and Vineyard Vines also stand out for their preppy, coastal-inspired designs that tie back to a sense of tradition and heritage.

In food and beverage, convenience and performance are key. Brands like Slim Jim, Huel, and Bang Energy have the highest affinity, reflecting the no-nonsense approach of this segment, focusing on efficiency, energy, and functionality over frills.





### **Retail brands**









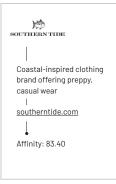


### **Fashion brands**









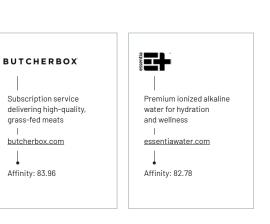


### Food and beverage brands









# SELF-CARE SEEKERS



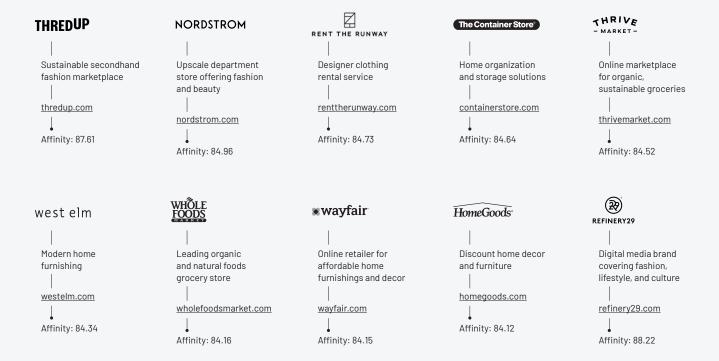
This segment represents the members of Gen Z who prioritize wellness in every facet of life. From products that soothe the mind to fitness experiences that support a healthy body, this group will be looking for gifts that contribute to their mental, physical, and emotional health this holiday season.

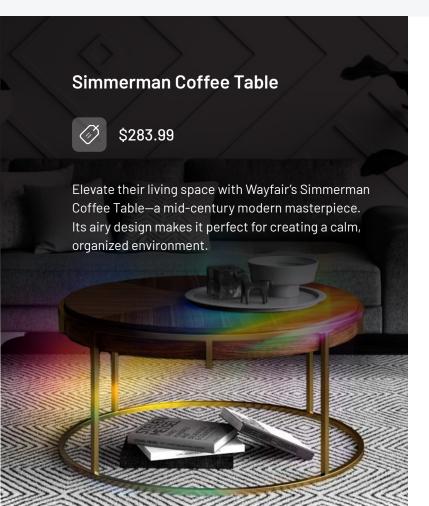
or many members of Gen Z,
wellness is more than just a social
media trend. With 42% of Gen Z
reporting concerns about their physical or
mental health, they've embraced self-care
as a vital part of their everyday lives. Mental
health topics like anxiety and depression,
once whispered about, are now openly
discussed and shape the way young
consumers approach their lives and
purchases. Fitness is also a priority for more
than half of Gen Z as they look to optimize
their mental and physical well-being, making
wellness a holistic pursuit.

In a world that never seems to slow down, the Self-Care Seekers aren't afraid to hit pause.

### Self-care seekers x retail brands

What retail brands do wellness-oriented Gen Z consumers love most?





### Qloo's take:

For Self-Care Seekers, creating a balanced, organized, and thoughtful life is central to their approach to wellness. ThredUp and Rent The Runway are leading the way in sustainable fashion, allowing Gen Z to embrace their unique style while being mindful of their environmental footprint. Thrive Market and Whole Foods offer organic and health-conscious products, empowering this group to prioritize their physical well-being. Home-focused retailers like West Elm, Wayfair, HomeGoods, and The Container Store provide stylish, comforting spaces that reflect a sense of calm and order, essential for mental wellness.

### Self-care seekers x fashion brands

What fashion brands do wellness-oriented Gen Z consumers love most?

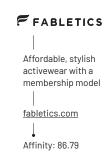
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### The Weekender in Olive



\$108.00

Make travel easier with Béis' The Weekender bag, a stylish and functional carryall perfect for weekend getaways or the gym.

### Qloo's take:

Self-Care Seekers demonstrate the highest affinity toward fashion brands that prioritize comfort, functionality, and well-being. Lululemon, Fabletics, and Athleta are standout choices for those who see fitness and mindfulness as core aspects of their daily routine, offering stylish activewear and atheisure clothing. Brands like Alo Yoga and Spiritual Gangster emphasize mindfulness and inner balance, blending spirituality with high-quality apparel, and Béis and Soulcycle cater to an on-the-go, active lifestyle. For this segment, fashion isn't just about looking good, but feeling good inside and out.

### Self-care seekers x health and beauty brands

What health and beauty brands do wellness-oriented Gen Z consumers love most?

VITAL PROTEINS

and health products

vitalproteins.com

Affinity: 86.28

Glossier.

glossier.com

Affinity: 85.62

Living proof.

livingproof.com

Affinity: 84.66

Haircare brand with a focus

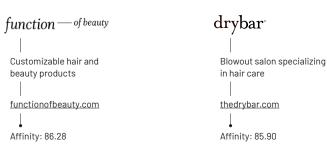
on science-driven solutions

Popular beauty brand known

for minimalist skincare

Leading brand for supplements

### Subscription-based service for fitness and wellness classpass.com Affinity: 88.96













\$45.00

Glossier's Crème de You has a lightweight, luxurious feel, making it a thoughtful gift for anyone who values treating themselves with a subtle, comforting fragrance.

### Qloo's take:

Self-Care Seekers nurture their health, wellness, and beauty in every aspect of their lives. Brands like ClassPass and Vital Proteins are the most favored health and beauty brands for this segment, offering convenient and affordable access to workouts and supplements that support overall well-being. Function of Beauty and Glossier also rank highly, offering personalized beauty routines, while Drybar and Living Proof provide high-quality hair care solutions that help them look and feel their best.



# GENERATIONAL WELLNESS

efore Gen Z was old enough to claim self-care as a way of life, Millennials were pioneering the movement. In 2015, according to the Pew Research Center, more Millennials had made personal improvement commitments than any generation before them, marking a significant shift in priorities. Their dedication to wellness has continued to shape their habits.

However, recent data indicates that Gen Z is showing even stronger affinities for certain wellness brands. Gen Z demonstrates higher affinity scores for brands like The Container Store (92.10 vs. Millennials' 86.39), ThredUp (87.61 vs. 82.66), Function of Beauty (86.23 vs. 81.56), and Living Proof (84.66 vs. 79.65). These brands resonate with Gen Z's desire for organization, sustainability, personalization, and self-expression.

Both generations share a strong appreciation for brands like ClassPass, with nearly identical affinity scores (88.96 for Gen Z and 88.90 for Millennials), highlighting a mutual commitment to physical fitness and mental clarity. Interestingly, Millennials show a slightly higher affinity for Fabletics (87.26 vs. Gen Z's 86.79), reflecting their ongoing support for established wellness brands.



### Gen Z vs. Millennials



Millennial Affinity: 86.39

Gen Z Affinity: 92.10

Difference: +5.71

### Living proof.

Millennial Affinity: 79.65

Gen Z Affinity: 84.66

Difference: +5.01

### **THREDUP**

Millennial Affinity: 82.66

Gen Z Affinity: 87.61

Difference: +4.95

### function — of beauty

Millennial Affinity: 81.56

Gen Z Affinity: 86.23

Difference: +4.67

### C) classpass

Millennial Affinity: 88.90

Gen Z Affinity: 88.96

Difference: +0.06

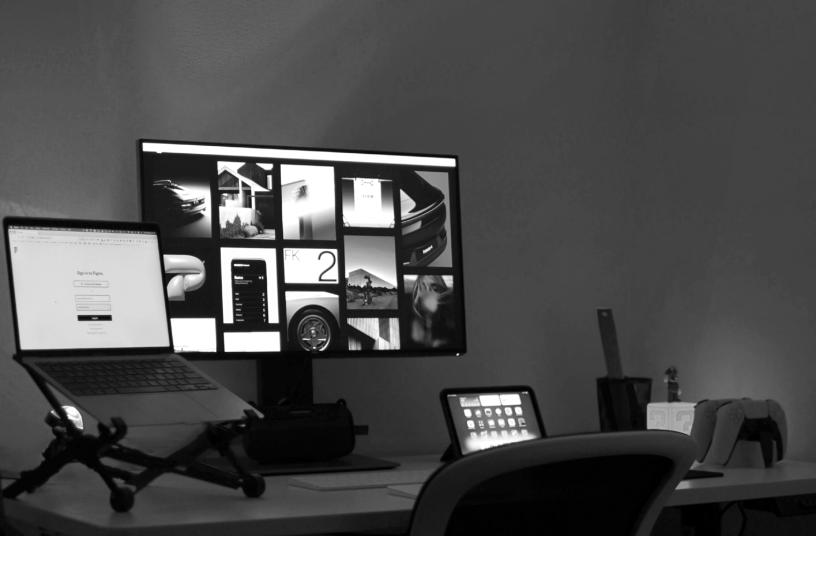
### FABLETICS

Millennial Affinity: 87.26

Gen Z Affinity: 86.79

Difference: -0.47





f you think gaming is just about high scores and shooting space invaders, think again. For Gen Z, gaming has become a digital playground where friendships are made, creativity flourishes, and self-expression knows no limits. Nearly 27% of Gen Z teens rank gaming as their top entertainment activity, and it's about so much more than entertainment—it's a way to connect. Whether they're chatting with friends through game-centered messaging platforms or showing off their skills on live streams, gaming has become a way of life for these Zoomers.

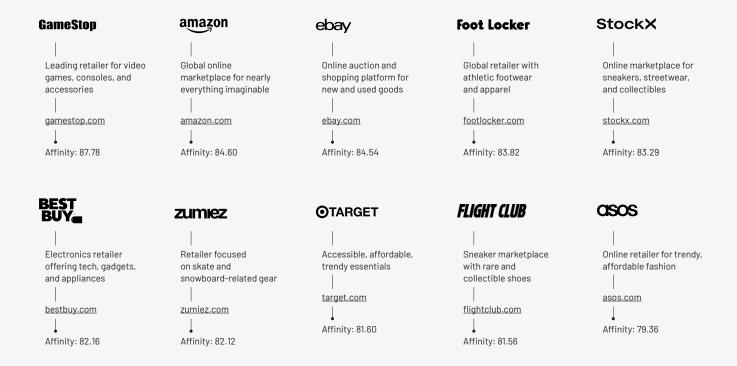
And it's not just about being tech-savvy. This holiday season, they'll be searching for gifts that level up their experience—both on and off the screen.

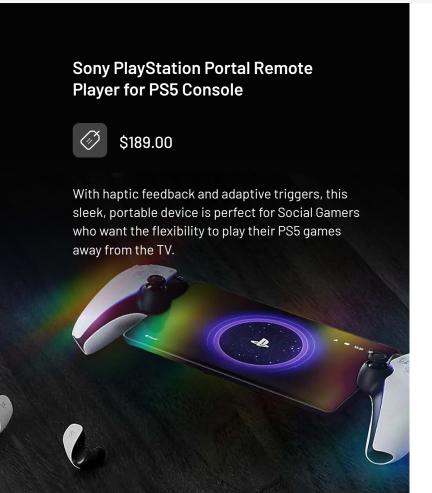
The Social Gamers are constantly seeking ways to blend their virtual lives with real-world connections.

They're the ones always on the lookout for the latest gadgets and games, immersive experiences, and digital spaces where they can interact, compete, and, most importantly, have fun.

### Social gamers x retail brands

What retail brands do Gen Z gamers love most?





### Qloo's take:

Social Gamers gravitate toward a mix of functionality and style when it comes to retail brands. GameStop remains a favorite destination for gaming consoles and accessories (and for the occasional short squeeze), while Amazon and eBay offer convenience and variety, catering to those looking for deals on everything from tech to paraphernalia. Brands like Foot Locker, StockX, and Flight Club appeal to gamers who value streetwear and sneakers, blending the latest trends with their gaming lifestyle. Best Buy and Target are go-to spots for tech upgrades and gaming essentials, and even brands like Zumiez and ASOS fit into the casual, everyday style of this audience.

### Social gamers x fashion brands

What fashion brands do Gen Z gamers love most?

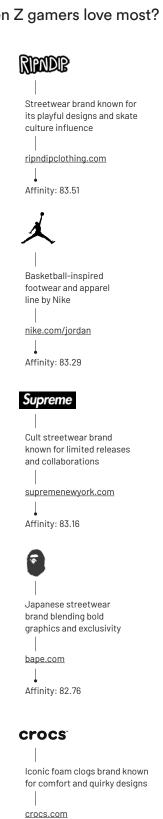












Affinity: 81.64



### Barnum Refillable Lighter (Silver)



\$36.00

Ripndip's Barnum Refillable Lighter fits perfectly with the Social Gamer's desire for distinctive and functional accessories. It's a practical yet stylish gift that aligns with the gaming community's laid-back and creative vibe.

### Qloo's take:

Social Gamers gravitate toward brands that offer a blend of comfort, style, and cultural relevance. Nike, Adidas, and Air Jordan are at the top, providing both performance and street style. Vans and Champion also appeal to this segment's love of laid-back, casual attire, while brands like Supreme and A Bathing Ape cater to their appreciation for hype and exclusivity in fashion. And yes, even Crocs find their way into this list. Gen Z can really make anything cool again—even "ugly fashion."

### Social gamers x electronics brands

What electronics brands do Gen Z gamers love most?





### **CORSAIR**

High-performance gaming accessories and hardware

corsair.com

Affinity: 88.80

#### SONY

Global leader in electronics, gaming, and entertainment tech sony.com

### logitech

Trusted brand for computer and gaming accessories |
logitech.com
Affinity: 88.18



### (S) elgato

### SAMSUNG

Global leader in electronics, specializing in smartphones and displays

samsung.com

Affinity: 85.66



Premium headphone brand known for stylish headphones and sound quality
beatsbydre.com
Affinity: 83.75





### JBL Clip 5 Bluetooth Speaker



\$69.95

Turn up the music with the JBL Clip 5 Bluetooth Speaker. Compact and portable, it's perfect for gamers who want high-quality sound both indoors and outdoors.

### Qloo's take:

For Social Gamers, their top electronics brands reflect their love for immersive gaming experiences and high-quality gear. PlayStation and Xbox remain the dominant gaming platforms, offering powerful consoles that deliver cutting-edge graphics and multiplayer connectivity. Meanwhile, Corsair, Logitech, and Hyper X provide the specialized accessories—keyboards, headsets, and gaming mice—that enhance gameplay and elevate performance.



# THE EASIEST WAY TO WIN

et's face it, picking the perfect gaming gear is tough—particularly if you're not familiar with the latest tech and accessories. After all, it takes a special area of knowledge to know what a VENGEANCE i8200 iCUE LINK EDITION Gaming PC: Intel Core i9-14900KF, NVIDIA RTX 4090, 64GB DDR5 6000MT/s Memory, 4TB (2x 2TB) M.2 NVMe SSD is. But don't worry, there's a foolproof solution: gift cards! Gift cards let your gamer choose exactly what they need, and you can be confident they'll be able to choose something they love.

Gift cards from PlayStation—the brand with the highest affinity among social gamers—are an easy option. These can be used on anything from the PlayStation Store—games, add-ons, subscriptions to PlayStation Plus, and more. Xbox offers a similar deal, with gift cards that cover the newest full game downloads, apps, movies, TV shows, and even devices. While specialized brands like Corsair, Hyper X, and Elgato don't offer gift cards directly, you can still pick up gift cards from retailers like Best Buy and Amazon, where many of their products are available. It's a no-stress solution that keeps everyone happy.

# UNDERSTAND YOUR AUDIENCE WITH QLOO'S INSIGHTS PLATFORM

You know your audience is out there, but finding out what really drives their decisions? That's the hard part. Data alone doesn't tell you who they are or what they care about. Qloo's Insights platform solves this puzzle, giving you the power to cut through the clutter and get straight to what matters: understanding your audience on a deeper, more personal level.

Oloo's powerful Insights tool brings the full depth of the Taste AI technology directly into your hands, unlocking endless opportunities for businesses to refine their strategies and connect more meaningfully with their target audiences. Whether you're interested in exploring audience preferences, identifying a perfect partnership, or uncovering emerging trends, our platform provides actionable, privacy-compliant insights that fuel smarter decision-making.



### Input anything, learn everything

From different demographics and locations to interests and hobbies, Oloo's insights platform reveals the detailed taste preferences of any global audience.



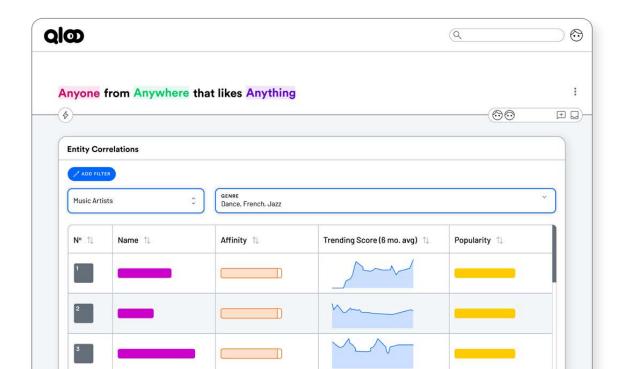
### Keep your finger on the pulse

Discover and stay ahead of emerging trends by analyzing how consumer preferences and sentiment change over time.



#### Compliant at its core

Oloo's models operate without any personally identifiable information (PII), ensuring complete compliance with major data protection regulations like GDPR and CCPA.



### **ABOUT QLOO**

Qloo is the leading Al company dissecting the intricacies of global tastes and preferences. The company operates one of the world's most robust catalogs of notable people, places, and things, coupled with a consumer behavior and sentiment database containing more than 10 trillion unique signals and zero Personally Identifiable Information (PII). By leveraging cutting-edge Al models, Qloo unlocks the value of these databases to understand and predict audiences' interests and affinities with unrivaled accuracy. Since 2012, Qloo's award-winning Taste Al technology has helped multinational companies — including Netflix, Starbucks, JCDecaux, and Michelin — drive growth by powering personalized customer experiences and large language models, superior recommendations, data-driven marketing strategies, and advanced audience intelligence.

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