![globalwebindex]

# Gen Z

Examining the attitudes and digital behaviors
of internet users aged 16-21

# Contents

# Introduction

GlobalWebIndex Audience reports are designed to examine the digital behaviors of a particular group – showcasing trends over time as well as analyzing how the audiences in question compare to the overall internet population. In this report, we place the spotlight on Generation Z – those internet users who are aged 16-21.

This report focuses on:

- **Profiling Gen Z** – from their attitudes and outlooks on the world to their interests, what are the defining characteristics of this group, and what are the stereotypes that hold true?

- **Online Behaviors** – how do their online activities differ across devices, and what measures are they taking to protect their online privacy?

- **Media Consumption** – do Gen Z spend longer watching online or broadcast TV and how many are using Netflix? How widespread is second-screening?

- **Social Media Engagement** – what are Gen Z's favorite social media platforms and who do they prefer to "follow" on these services?

- **Commerce and Brand Engagement** – how many are shopping online each month and how does this audience discover and interact with brands while online? What can brands do to appeal to a Gen Z?

# Key Insights

Gen Zs value and trust the opinion of their peers to guide their buying decisions; 4 in 10 say they are easily swayed by others' opinions.

Mobiles have a considerable lead over PCs/laptops for video-sharing and social-related behaviors. This is very much down to the on-to-go accessibility of mobiles.

Generation Z are clocking up nearly 7 hours a day online. A considerable 1 hour 13 minutes of this time is being spent watching online TV, although this is exactly the same as the average internet user.

75% of Gen Zs can be categorized as *Celebrity Networkers* – those that use social media to keep up with celebrities, celeb news, and follow actors, comedians, singers or TV presenters – 24% more likely than average.

YouTube is the firm favourite among this audience, having a 12-percentage-point lead over Facebook for monthly usage.

72% of Gen Zs say they have purchased a product online in the last month via any device. M-Commerce has made a considerable impact among this group compared to other devices, with 6 in 10 purchasing on their mobiles.

High-quality products are most likely to convince Gen Z to become brand advocates. Financial rewards score highly too, indicating that many would engage in advocacy when they see a clear value exchange.
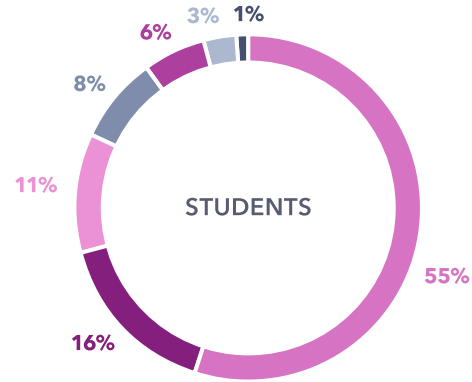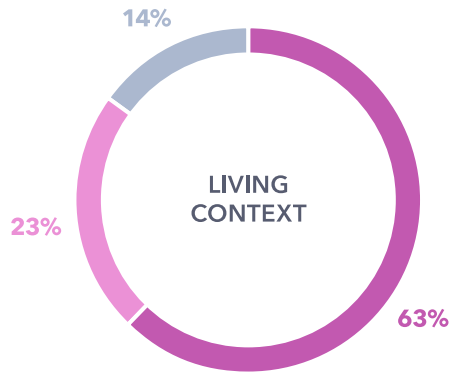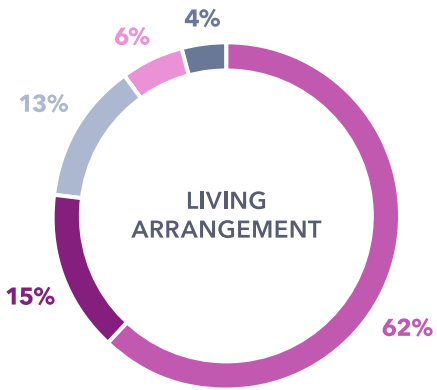
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**Gen Z**

# Profiling Gen Z

# Demographic Overview

**62%** OF GEN Z LIVE **WITH PARENT(S)**

**63%** OF GEN Z LIVE IN AN **URBAN LOCATION** BUT **SUBURBAN** IN **NORTH AMERICA**

**55%** OF GEN Z ARE **STUDENTS**

## LIVING ARRANGEMENT

4%
6%
13%
15%
62%

- Live with parent(s)
- Live with friends/roommates
- Live by myself
- Live with my partner
- Other

## LIVING CONTEXT

14%
23%
63%

- Urban
- Suburban
- Rural

## STUDENTS

1%
3%
6%
8%
11%
16%
55%

- Student
- Full-time worker
- Part-time worker
- Unemployed
- Self-employed/freelancer
- Other
- Full-time/stay-at-home parent

## Fact or Fiction?  Exploring Eight of the Most Common Gen Z Stereotypes

**It wasn't that long ago that millennials were at the forefront of almost every marketing blog and brand strategy. But, over the past few years, Generation Z are now the consumers on everyone's lips.**

Although definitions differ, Gen Z generally includes all of those born after 1997. By 2020, Millennial Marketing and Barkley expect them to represent 40% of all consumers. But right now, most Gen Zs are either in the latter stages of schooling, in university, finding themselves on a spiritual gap-year or just entering the workforce.

This generation has its fair share of stereotypes, misconceptions and hyperbolic reputations. So before we explore Gen Z's distinct preferences, attitudes and behaviors, it's worth clarifying which of these stereotypes hold true when put under an analytical microscope.

### 1.  Are they penny-pinching account sharers?

Many assume that Gen Zs are avid account-sharers, but our data indicates this isn't necessarily the case. Compared to all Netflix users, Gen Z Netflixers are (only slightly) more likely to say that they are the only person using their account, and similarly with Spotify there are no distinct differences in account sharing between all Spotify users and Gen Z Spotifyers. While rates of account sharing among Spotify users stay relatively consistent across the five regions, there are major regional differences with Netflix account sharing. Whereas around half of Gen Z Netflixers say they are the only person to use their Netflix account in APAC and the Middle East and Africa, this drops down dramatically among Gen Zs in Latin America to 15%.

### 2.  Have they given up on cable?

Debatable. They haven't given up entirely on it just yet – they're still watching just under 1.5 hours of broadcast TV per day. However, this is over 30 minutes less per day than the global average. Perhaps surprisingly, they aren't watching more online TV than the typical internet user per day, averaging 1 hour 13 minutes per day.

### 3.  Do they love influencers?

Yes, absolutely. They are 1.5x more likely than average to follow vloggers on social media, 1.4x more likely to say they use social media to follow celebrities and celebrity news and 1.25x more likely to discover new brands and products via endorsements by celebrities. This is clearly a prime audience for influencer marketing, with over two-thirds having an account on Instagram.

### 4.  Do they have a positive outlook on the future/environment/economy?

They are typically in line with the global average in terms of agreeing that they feel positive about the environment or global economy; just under half either strongly or slightly agree with either statement. However, Gen Z actually over-index for saying they disagree with feeling positive about the future of the environment. This varies widely by region; whereas only 21% of Gen Zs in APAC disagree with feeling positive about the state of the environment, this jumps up to 49% among Gen Z in Europe which is almost twice the global average. A positive outlook towards the future has long been associated with this audience, but maybe recent political and social events have mitigated that optimism, especially with topics such as climate change which they will inevitably feel the full effects of in the years to come.

**Fact or Fiction?**  Exploring Eight of the Most Common Gen Z Stereotypes

## 5.  Are they abstaining from alcohol?

Our data seems to indicate that they are a lot more conscious of how much they drink; over a third (37%) of Gen Zs aged 18-21 (outside the U.S.) say they never drink alcohol, which is 75% more likely than the global average. To put this into context, only 21% of millennials say they are abstaining from alcohol. Only 16% of Gen Zs aged 18-21 say that they drink alcohol at least on a weekly basis. Compare this to 27% of millennials, 33% of Gen X and 36% of Baby Boomers who say they do so in the same timeframe.  They also under-index for all types of monthly alcohol consumption, like beer, gin, rum, wine and tequila. These patterns in behavior are largely similar for 21 year olds in the U.S. compared to their older counterparts. This is generally a health-conscious group – Gen Zers are 35% less likely than average to be a non-engager in running/jogging, and over a third have purchased a health food in the past month.

## 6.  Are they hopelessly screen-addicted?

Spending nearly three hours a day on social media, it's generally true that Gen Zs are very attached to their phone. Just under 6 in 10 of this group say that it is critical for them to be contactable at all times, and a similar percentage agree that they feel more insecure without their phone than their wallet.

## 7.  Are they ditching Facebook?

There's been a lot of talk over the past few years about the troubles of Facebook among younger age groups, with Gen Z preferring alternative platforms such as YouTube, Instagram and Snapchat. However, membership rates on Facebook have stayed remarkably consistent since Q4 2015, increasing from 84% to 86%. Visitor/usage rates have dropped by six percentage points in the same timeframe, but there are still over ¾ of this audience saying they have visited Facebook in the past month. Most surprising of all, however, is that active engagement has not decreased at all in the last 3 years; 1 in every 2 Gen Z has actively contributed to Facebook in the past month. For more than daily visits to social platforms, Facebook comes third behind YouTube and Instagram, although it does still narrowly lead Instagram when looking at male Gen Zs only.

## 8.  Are they more likely to share personal information if they see some sort of benefit from brands?

Although 62% of Gen Zs worry about how their personal data is being used by companies, it is unclear whether they would be willing to give up personal information if they see a benefit. This privacy paradox has been talked about for a while now, as consumers get used to balancing their desire for personalized experiences with the very reasonable fear that their data would be mishandled. With 23% of Gen Zs saying that they block ads to stop them being personalized based on their browsing history, how brands potentially use or mishandle information is clearly a concern to a significant proportion of Gen Zs. This isn't a Gen Z-specific trait; the same percentage of millennials say they use ad-blocking to stop ads being personalized, although both generations do so to a lesser extent compared to baby boomers (30%).
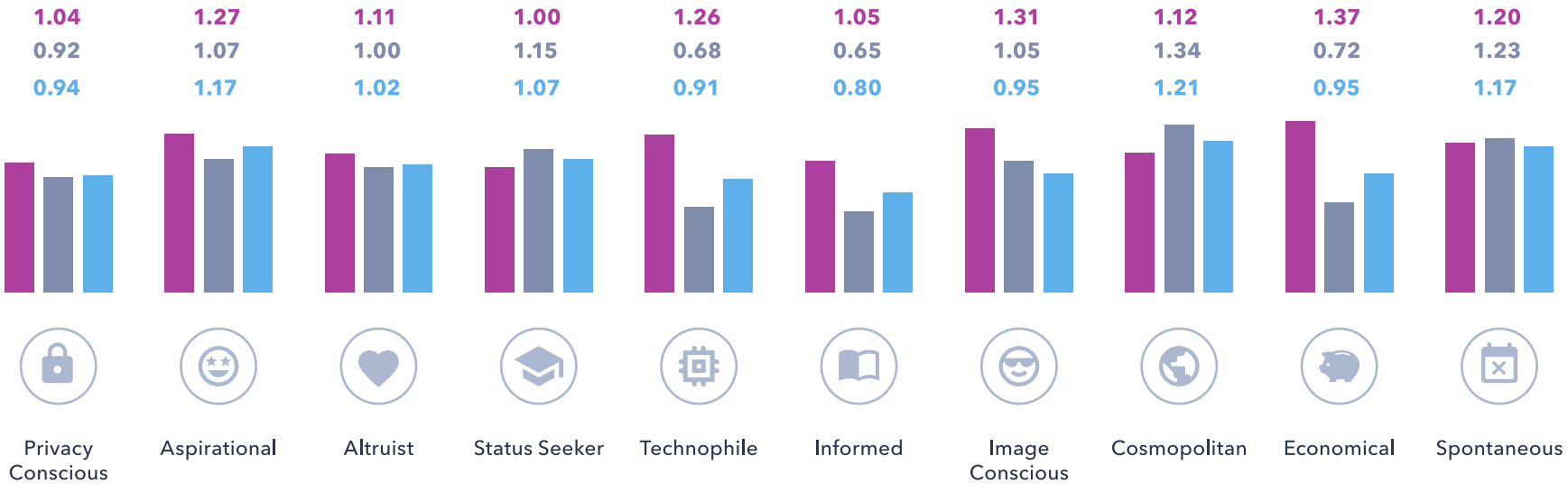
# The Gen Z Life Cycle

**The three stages of Gen Z, and how they index for different attitudinal segmentations**

**Gen Z Students:** *16-21-year-olds who say that they are currently a student in full-time education*
**Gen Z Travelers:** *16-21-year-olds who say that they go on medium to long-haul vacations abroad at least once a year*
**Gen Z Professionals:** *16-21-year-olds who say they are either a full-time, part-time or self-employed worker*

| | Privacy Conscious | Aspirational | Altruist | Status Seeker | Technophile | Informed | Image Conscious | Cosmopolitan | Economical | Spontaneous |
|---|---|---|---|---|---|---|---|---|---|---|
| Students | 1.04 | 1.27 | 1.11 | 1.00 | 1.26 | 1.05 | 1.31 | 1.12 | 1.37 | 1.20 |
| Travelers | 0.92 | 1.07 | 1.00 | 1.15 | 0.68 | 0.65 | 1.05 | 1.34 | 0.72 | 1.23 |
| Professionals | 0.94 | 1.17 | 1.02 | 1.07 | 0.91 | 0.80 | 0.95 | 1.21 | 0.95 | 1.17 |



**Gen Z students are 1.45x more likely** to say that a brand should make them feel cool and trendy

**Gen Z travelers are 1.6x more likely** than the average internet user to say a 'buy' button on a social network would most increase their likelihood of buying a product.

**Gen Z travelers are 2.2x more likely** to say they donate to charity at least weekly

**A third of Gen Z professionals** use social media to meet new people

**Gen Z professionals are 80% more likely** than the average internet user to say they enjoy rap music
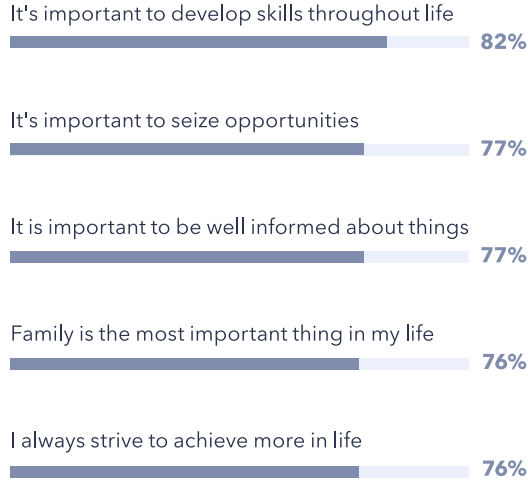
# Attitudes & Lifestyle

## Top 5 Self-Perceptions

*% who agree with the following statements*

It's important to develop skills throughout life
**82%**

It's important to seize opportunities
**77%**

It is important to be well informed about things
**77%**

Family is the most important thing in my life
**76%**

I always strive to achieve more in life
**76%**

As widely reported, **Gen Z are digital natives**. Born into a high-tech, high-networked world and accustomed to having a constant proliferation of information readily accessible to them. They have never known a time without the internet, and probably can't imagine life before the smartphone.

In terms of their attitudes and self-perceptions, it tends to be the statements relating to ambition that score the highest figures. Three-quarters say that they always strive to achieve more in life, while a similar proportion attach value to seizing opportunities (77%) and developing new skills (82%).

It's perhaps their strongest over-indexes that are of the most interest. Given that 4 in 10 say they are easily swayed by others' opinions, they clearly value and trust the opinion of their peers to guide their buying decisions. This links with the fact that they're 15% more likely to fit into our Image Conscious segment, which encompasses fashion- and appearance-oriented individuals, who feel it's important to be respected by those around them.

From a glance at our **lifestyle segmentation**, it's clear that convenience is important to this group. 1 in 3 are regular consumers of fast food, with McDonalds being the top choice here (54% eat here at least monthly). This compares to just 12% who regularly eat out at restaurants, with income levels having a clear impact here.

## Lifestyle Activities

*% who say they do the following things...*

● **Regularly**   ● **Semi regularly**

| | | | |
|---|---|---|---|
| **33%** / **19%** | **12%** / **38%** | **27%** / **13%** | **3%** / **24%** |
| Eat fast food | Eat out at a restaurant | Go to a gym | Visit the cinema |
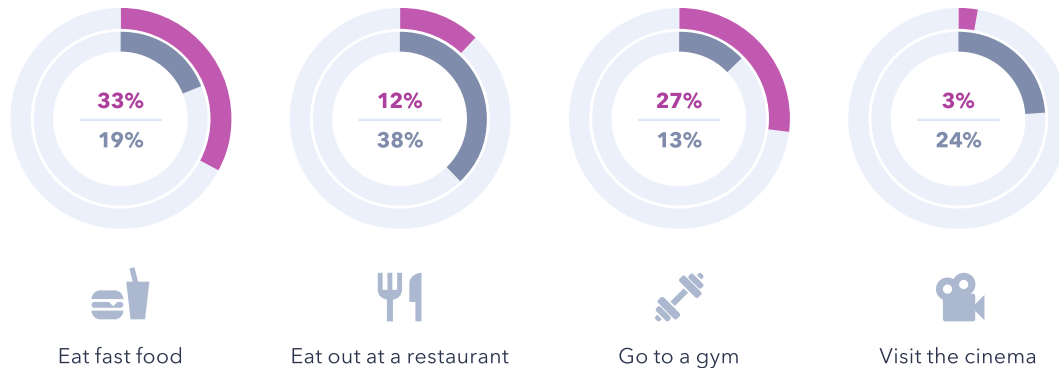
## Gen Z say they…

**59%** would like to work and live abroad **IDX 1.22**

**41%** are easily swayed by other people's opinion **IDX 1.15**

**51%** are risk takers **IDX 1.12**

# Interests

## Top 5 Interests

*% who are strongly interested in the following*

**68%** Music

**59%** Films/cinema

**57%** Food & drink

**55%** Gaming

**54%** Technology

## Gen Z are more likely than average to be interested in…

**1.37** Gaming

**1.30** Adventure/ extreme sports

**1.27** Urban/ modern art

IDX 1.00
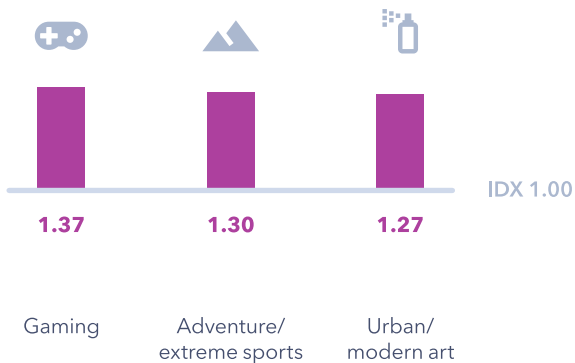
## Gen Z are less likely than average to be interested in…

**0.79** Gambling

**0.81** Gardening

**0.82** Local issues
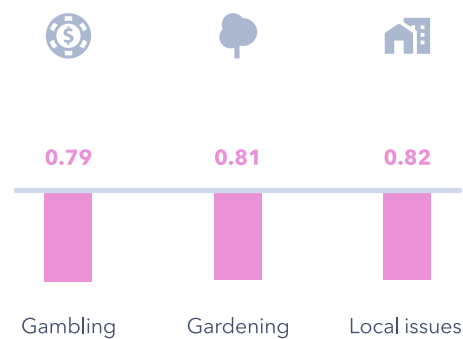
**Popular culture comes top when we ask Gen Z about their strongest interests.** Around 7 in 10 report having an interest in music, and 6 in 10 have an interest in movies. This group also over-index for other forms of entertainment, such as gaming, extreme sports and urban art, but are behind the curve for gambling and local issues.

Gen Zs in the LatAm region are **2.2x more likely** than average to cite gambling as a personal interest

# Sports

**Nearly half (48%) of all Gen Zs say they are interested in fitness and exercise.** A similar proportion of this audience can be considered regular runners/joggers, while over a quarter are regular gym-goers.

They're also enthusiastic about taking part in various sports, over-indexing for most of the sports we track. Football/soccer tops the list here, with a third saying they play this, but they're 35% more likely to be playing basketball.

**Gen Zs in Middle East and Africa are just under 3x more likely to regularly play netball**

When it comes to watching specific events and leagues online or on TV, **they are slightly less likely to be watching nearly all the competitions/ leagues we track**. But we still see some notable levels of engagement. Beyond non-annual events such as the FIFA World Cup, and the Summer and Winter Olympics (which make up the top three most watched events), the UEFA Champions League and the National Basketball Association are the most popular annual events.

### Most Popular Sports Played

*% who play or take part in the following sports*

**1.** Football/soccer . . . .  **IDX 1.28**

**2.** Swimming. . . . . . . .  **IDX 1.06**

**3.** Badminton . . . . . . . .  **IDX 1.25**

**4.** Cycling . . . . . . . . . . .  **IDX 1.16**

**5.** Basketball. . . . . . . . .  **IDX 1.35**
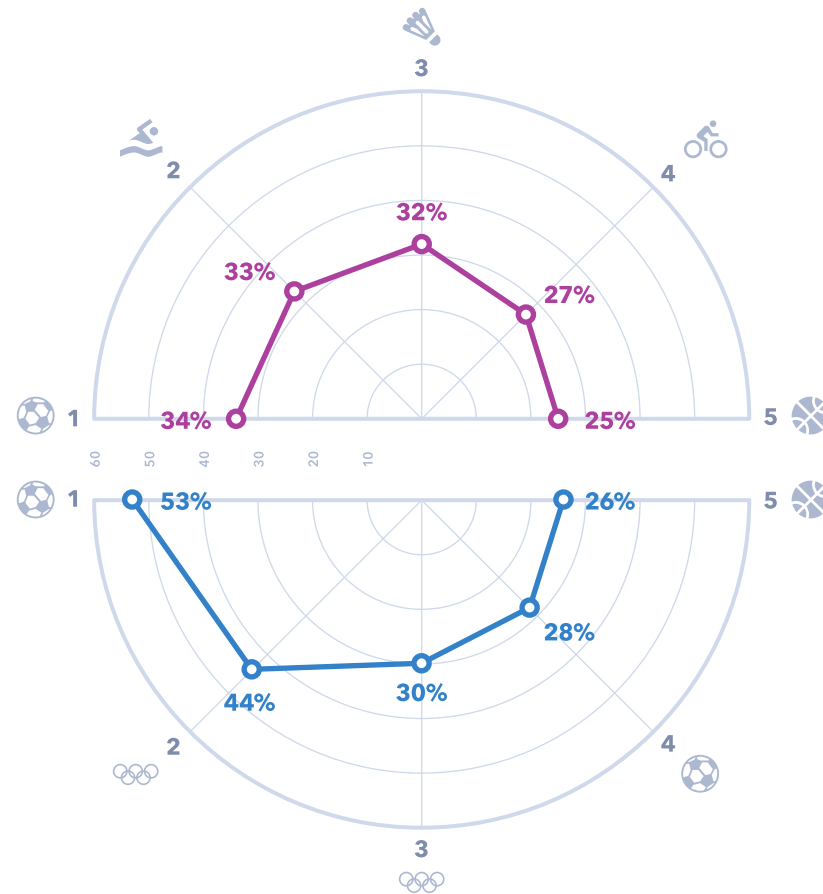
### Most Popular Sports Leagues Watched

*% who say they are interested in or watch the following...*

**1.** FIFA World Cup . . . .  **IDX 1.05**

**2.** Summer Olympics  .  **IDX 0.92**

**3.** Winter Olympics . . .  **IDX 0.86**

**4.** UEFA Champions . .  **IDX 0.89**

**5.** NBA . . . . . . . . . . . . .  **IDX 1.01**

The exception to this is cricket; the top seven highest-indexing sporting leagues watched online or on TV are all cricket tournaments. This includes the Indian Premier League (Index 1.85), the ICC World Cup (1.68), the International Test Match (1.61), the ICC World Twenty20 (1.59) and International One Day (1.57). However, these figures are massively inflated by Gen Zs in India. When we take India out, the top ten highest-indexing leagues followed are all market-specific soccer leagues, apart from Ultimate Fighting Championship – Gen Zs are 21% more likely than average to follow UFC.
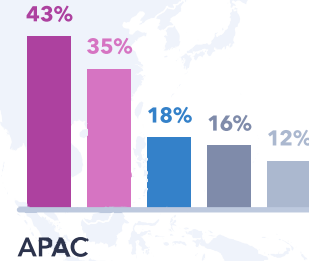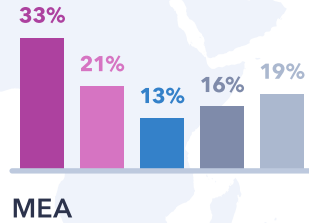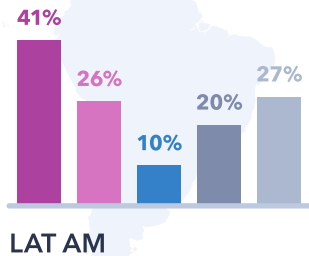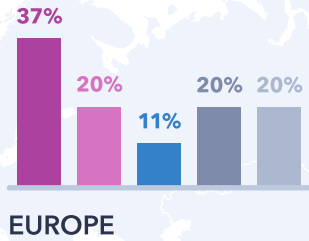
# Esports

## Gaming Activities Across the Regions

*% who say they do the following gaming activities...*

● Watched a live gaming stream     ● Watched an e-sports tournament     ● Broadcast a live gameplay stream

● Purchased a game add-on/DLC     ● Used a subscription service

**NORTH AM**
36% 18% 12% 28% 26%

**EUROPE**
37% 20% 11% 20% 20%

**APAC**
43% 35% 18% 16% 12%

**LAT AM**
41% 26% 10% 20% 27%

**MEA**
33% 21% 13% 16% 19%
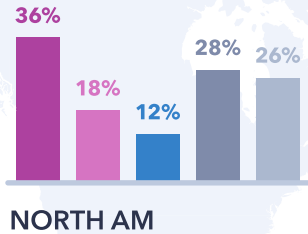
Esports is an umbrella term referring to competitive video game tournaments. Although video game tournaments have been around for some decades now, it's only in the last decade that this entertainment has managed to breakout into a global phenomenon with serious revenue-generating potential.

**Esports has highest engagement with Gen Z in APAC; 35% say they have watched an esports tournament recently**
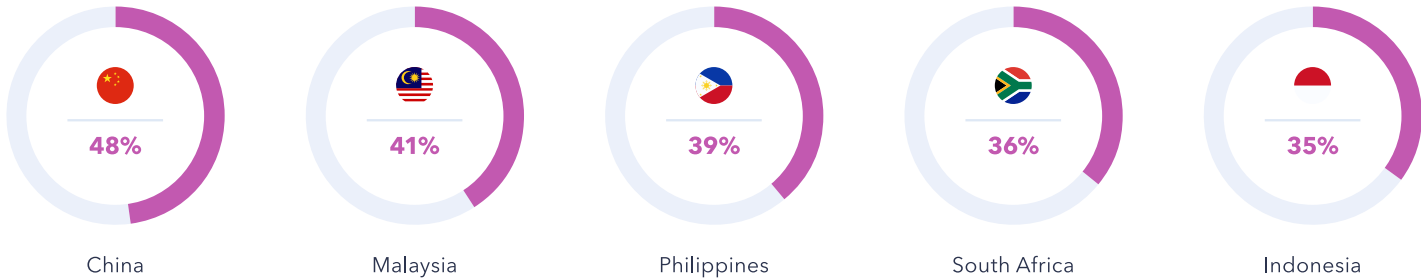
# Esports

**Highest Gen-Z engagement with esports tournaments**

*% who say they have watched an esports tournament in the last month*

| 48% | 41% | 39% | 36% | 35% |
|-----|-----|-----|-----|-----|
| China | Malaysia | Philippines | South Africa | Indonesia |

And the driving force behind this now-massive industry has generally been younger, affluent consumers. **Just under a third of all Gen Zs have watched an esports tournament, 1.45x the global average.** Even when indexed against people with an interest in gaming, Gen Zs are still much more likely to have watched a live gaming stream (52%) and for watching an esports tournament (38%) in the last month. And when we compare to younger millennials aged 22-28, Gen Zs are more likely to have watched an esports tournament in four out of the five regions – only in APAC do younger millennials show higher engagement with this activity.

With over half of this audience saying they are interested in gaming, and a fifth having paid for a mobile game in the last month (Index 1.21), it's not difficult to see why this is a prime audience for esports marketers to target. This is especially the case in the Asia Pacific region, where Gen Z are 1.6x more likely to have watched an esports tournament recently compared to the average internet user.

With Gen Z's general dislike towards the frequency and irrelevance of most ads they see, brands are falling behind in terms of their channel agility. Budgetary pressure and KPI paralysis are largely to blame for the lack of experimentation in platforms outside the traditional arsenal.

But **newer channels, such as Amazon-owned game-streaming service Twitch, are becoming increasingly popular to uncover untapped audiences such as Gen Zs**. This audience is 1.3x more likely than average to have visited or used Twitch in the past month, with just under a quarter having an account. Partnering with the right influencers on Twitch, and creating relevant content that creates real-value for the viewer, can exponentially increase the likelihood of a positive reaction to an ad slot or campaign channel.
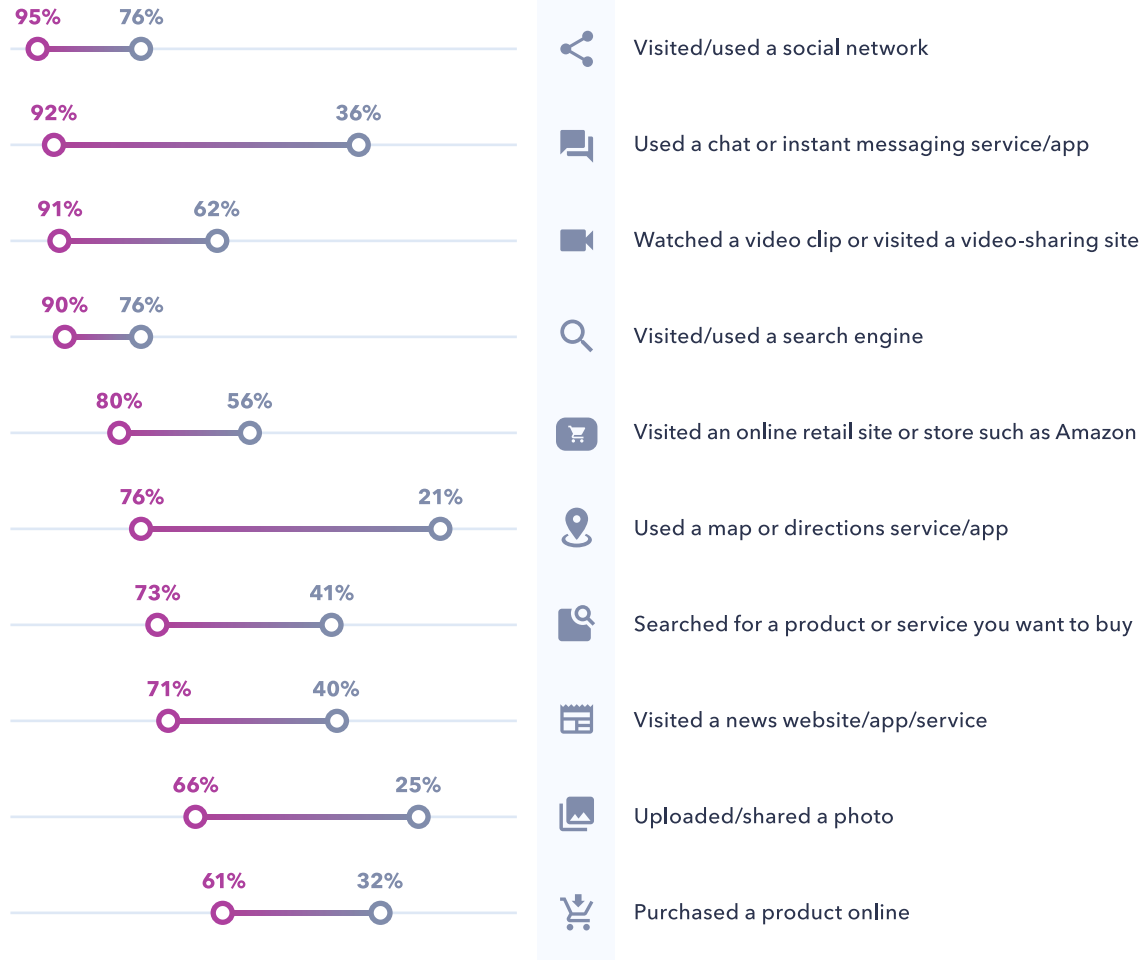
# Online Activities | Mobiles vs PCs/Laptops

## Online Behaviors by Device

*% who did the following online last month via…*     ◉ Mobile     ◉ PC/Laptop

| | | |
|---|---|---|
| 95%  76% | ⤳ | Visited/used a social network |
| 92%  36% | 💬 | Used a chat or instant messaging service/app |
| 91%  62% | 🎥 | Watched a video clip or visited a video-sharing site |
| 90%  76% | 🔍 | Visited/used a search engine |
| 80%  56% | 🛒 | Visited an online retail site or store such as Amazon |
| 76%  21% | 📍 | Used a map or directions service/app |
| 73%  41% | 🔎 | Searched for a product or service you want to buy |
| 71%  40% | 🗞 | Visited a news website/app/service |
| 66%  25% | 🖼 | Uploaded/shared a photo |
| 61%  32% | 🛒 | Purchased a product online |

Given the considerable importance attached to smartphones, it's to be expected that these devices are the go-to for all of the online behaviors we track. In particular, **mobiles have a considerable lead over PCs/laptops for video-sharing and social-related behaviors (like using social networks and chat apps)**. While 6 in 10 say they have watched a video clip or visited a video-sharing site on their PC/laptop in the last month, this figure jumps up to 9 in 10 on mobiles. This is very much down to the on-to-go accessibility of mobiles.

That said, there is still a decent proportion carrying out behaviors on PCs/laptops; 56% have visited an online retail store, for instance, and 32% have purchased a product in the last month. Regional differences may shine some light here; almost double the respondents in Europe (40%) say they have purchased a product on their PCs/laptops compared to respondents in the Middle East and Africa (23%) – where PC/laptop ownership is much lower at only 42%.
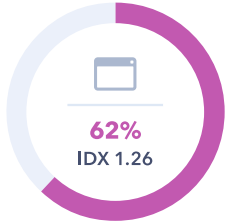
# Online Privacy

## Online Privacy Measures

*% who have done the following in the last month*

**62%**
IDX 1.26

Used a private
browsing window

**51%**
IDX 1.10

Used an ad-blocker

**50%**
IDX 0.98

Deleted cookies

**38%**
IDX 1.27
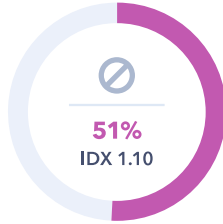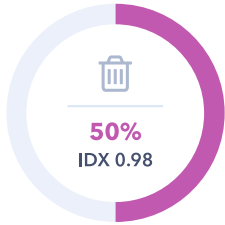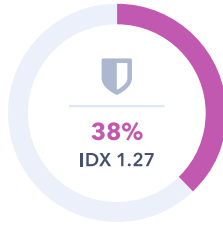
Used a VPN or
Proxy Server

## Top Ad-Blocking Motivations

*% of ad-blocker users who say they
block ads for the following reasons*

**49%**    IDX 0.99
There are too many ads on the internet

**48%**    IDX 0.99
Too many ads are annoying or irrelevant

**46%**    IDX 1.01
Ads are too intrusive

**40%**    IDX 1.04
Ads take up too much screen space

**39%**    IDX 1.02
Ads sometimes contain viruses or bugs

Each month, 1 in 2 delete cookies, which is a thorny issue for many websites and online retail stores that rely on cookie data to customize their platforms and provide personalized recommendations to visitors. Private browsing windows, used by 62% (Index 1.26), will also be having an impact.

Ad-blocking is arguably the biggest threat here, and Gen Z are 10% more likely than average to be blocking ads on their desktops and mobiles. **An overabundance of adverts online is the biggest frustration (49%), with the majority saying they block ads because they are annoying/irrelevant (23%) or intrusive (22%).** This generation has been inundated with advertising for as far as they can remember and, as such, are very aware of the number of adverts that pop up, although their reasons for ad-blocking are very much in line with older ad-blockers' frustrations.

In the age of Big Data and the GDPR, **consumers are now very attuned to their online privacy and taking action to protect it**. 62% say they worry about how their personal data is used by companies, while 56% say they prefer to be anonymous online. In light of these attitudes, it's no surprise that these consumers are taking proactive steps to protect their data and anonymity.
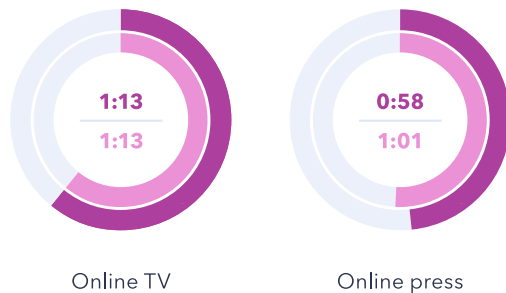
**Gen Z**

# Entertainment & Media

# Media Consumption Behaviors

**Media Consumption Behaviors**

*Average hours and minutes per day spent on…*

## SPECIFIC ONLINE ACTIVITIES

● Gen Z    ● Global Average

**1:13**
1:13

**0:58**
1:01

Online TV

Online press

## OFFLINE ACTIVITIES

● Gen Z    ● Global Average

**1:26**
1:58

**0:53**
0:46

TV

Press

**Generation Z are clocking up nearly 7 hours a day online.**
A considerable 1 hour 13 minutes of this time is being spent watching online TV, although this is exactly the same as the average internet user and 13 minutes per day less than younger millennials aged 22-28 years-old. The rising popularity and accessibility of services like Netflix is allowing all consumers to spend a significant part of their day watching online shows, wherever they are. Compare this to traditional broadcast TV, where Gen Z typically spend half an hour less per day watching than the global online average.
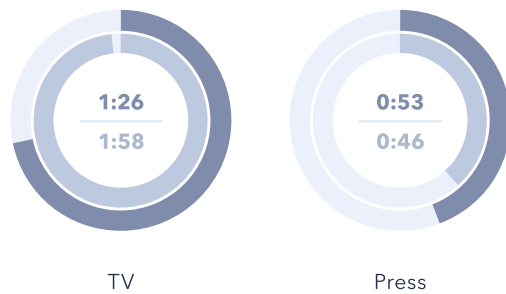
# TV Attitudes

**The availability of flexible and on-demand access to TV shows and films is something that resonates strongly with these young internet users.** And mobile is quickly catching up with televisions as Gen Z's most popular device to watch any type of TV, including live, on-demand and subscription services. Although it is only 6% that say they never watch live television on a TV channel, this is still 1.4x more likely than the average internet user. Just 54% of Gen Zs pay for a subscription TV service, putting them 9% behind the average. This is an audience who have come to age in a time when it's normal for content and services to be available on-demand, and having the likes of Netflix and Amazon Prime Video, they have a wide selection of relatable and relevant content available to watch at any time. This trend of having the ability to watch multiple episodes at any one time isn't just seen with Gen Z though; **they only slightly over-index for saying they regularly watch back-to-back episodes**.

## Frequency of Watching TV

*% who say they do the following at least once a week*
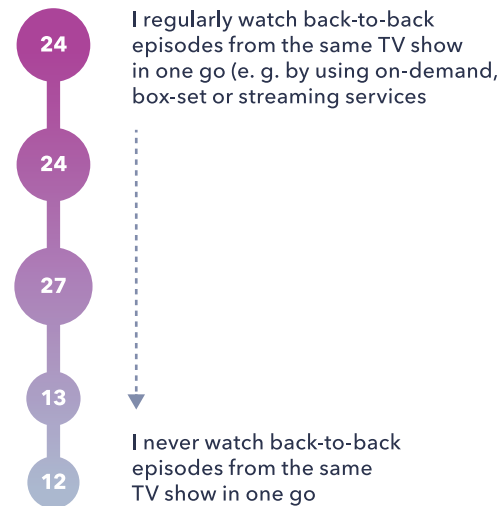
**57%** Watch a TV channel's catch-up/on-demand service

**76%** Watch live television on a TV channel

**59%** Watch subscription services such as Netflix

**51%** Watch shows that you have recorded from TV

## TV Attitudes: Binge Watching

*% who select the following point on the scale*

**24** I regularly watch back-to-back episodes from the same TV show in one go (e. g. by using on-demand, box-set or streaming services)

**24**

**27**

**13**

**12** I never watch back-to-back episodes from the same TV show in one go

## The rise of subscription fatigue?



At Apple's March Special Event, Tim Cook announced the Apple TV+ and Apple Arcade, subscription services only available with Apple originals. Unlike Netflix or Amazon Prime Video, you don't get access to a back catalog of licensed shows or movies. Apple TV+ is not a separate, standalone app. Instead, you'll get to it using Apple's TV app, which is expanding to many more devices over the coming months. With an ever-expanding range of subscriptions services – including Netflix, HBO Now, Hulu, Showtime, Amazon, YouTube Premium, Disney, AT&T and NBC Universal – consumers may be starting to get frustrated with the fragmented streaming space. **Although a fifth of Gen Zers have purchased a movie or TV streaming service in the last month, this is 14% less likely than the average internet user.** Especially with less affluent Gen Zers, media companies should not only continue to strengthen the quality and value of their content libraries, but pay close attention to consumer frustrations such as advertising overload and data privacy concerns.
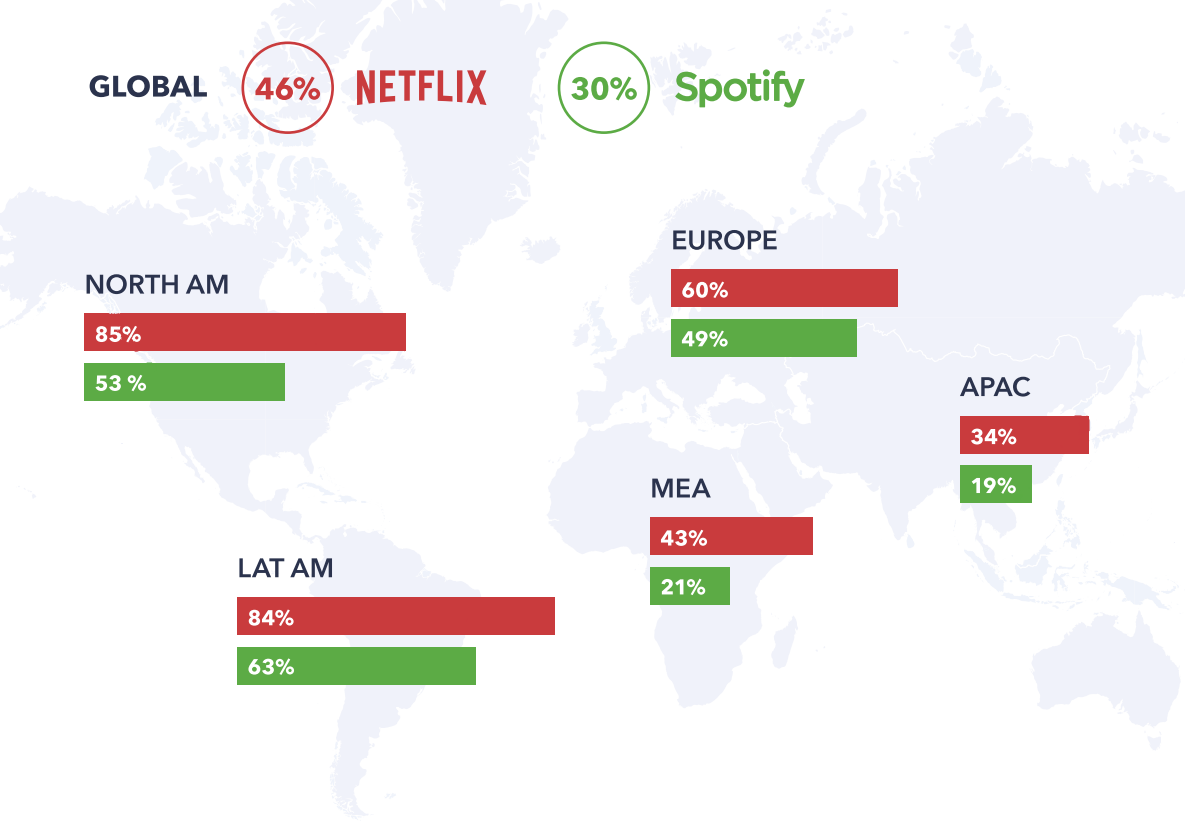
# Spotify & Netflix Usage Around the World

## Spotify and Netflix Around The World

*% who have used the following services in the last month*

**GLOBAL** — **46%** NETFLIX — **30%** Spotify

**NORTH AM**
- 85%
- 53 %

**LAT AM**
- 84%
- 63%

**EUROPE**
- 60%
- 49%

**MEA**
- 43%
- 21%

**APAC**
- 34%
- 19%

> Gen Z Spotifyers are 14% less likely than all Spotify users to share their account with at least one other person

In the music-streaming and VOD space, there are two names that currently dominate – Spotify and Netflix. Each month, 30% of Gen Zs are watching Spotify (Index 1.43) and just under half use Netflix (Index 1.23). But these figures hide some very big regional and market-by-market differences.

**Spotify performs particularly strongly in the Americas and Europe, with 50-60% of people having an account.** Latin America has the highest Spotify engagement at 63%. By market, Spotify's strongest performance is in Ireland, where a massive 85% of Gen Zs say they have a Spotify account. To put this into perspective, this is 10% higher than the second highest engagement, in Spotify's home country Sweden.

It's a similar story for Netflix. The service sees considerably higher usage among Gen Zers based in the Americas. **85% report using Netflix each month in the USA, and 84% in Latin America, but the market with the highest engagement with Netflix each month is in fact Austria, at 88%.**

# Spotify & Netflix Usage Around the World

**Spotify and Netflix Around The World**

*% who have used the following services in the last month*

## TOP 5 **NETFLIX** MARKETS

| | | |
|---|---|---|
| 🇦🇹 | Austria | **88%** |
| 🇦🇷 | Argentina | **86%** |
| 🇧🇷 | Brazil | **85%** |
| 🇺🇸 | USA | **85%** |
| 🇲🇽 | Mexico | **84%** |

## TOP 5 **SPOTIFY** MARKETS

| | | |
|---|---|---|
| 🇮🇪 | Ireland | **85%** |
| 🇸🇪 | Sweden | **75%** |
| 🇳🇿 | New Zealand | **75%** |
| 🇵🇭 | Philippines | **74%** |
| 🇪🇸 | Spain | **73%** |

It is a much different story in Asia Pacific and the Middle East & Africa. In the last month, only 1 in 5 in both regions have used Spotify in the past month. While QQ Music (28%) and iTunes (20%) are ahead of Spotify in APAC, the gap is fairly small. **In the Middle East and Africa however, music engagement is dominated by SoundCloud; the service has a 34-percentage-point lead over Spotify.**

Figures are similarly lower in the Middle East and Africa for Netflix engagement, although it still commands a 17-point lead over Shahid.net. In Asia Pacific, the TV streaming landscape is much more fragmented; whilst Netflix leads (34%), it is closely followed by iQuyi (30%), YouKu & Tudou (25%) and Hotstar (25%).

**Many assume that Gen Zers are avid account-sharers, but our data indicates this isn't necessarily the case.** Compared to all Netflix users, Gen Z Netflixers are (only slightly) more likely to say that they are the only person using their account, and similarly with Spotify there are no distinct differences in account sharing between all Spotify users and Gen Z Spotifyers.

While rates of account sharing among Spotify users stays relatively consistent across the five regions, there are major regional differences with Netflix account sharing. Whereas around half of Gen Z Netflixers say they are the only person to use their Netflix account in APAC and the Middle East and Africa, this drops down dramatically among Gen Zers in Latin America to 15%.

# Second-Screening Behaviors

As discussed, Gen Zs are a constantly-connected group who multitask across multiple screens. Another key example of this is second-screening – a completely mainstream behavior among this generation. **95% say they were using another device the last time they were watching TV, with mobiles central to this (89% are dual-screening via a mobile).**
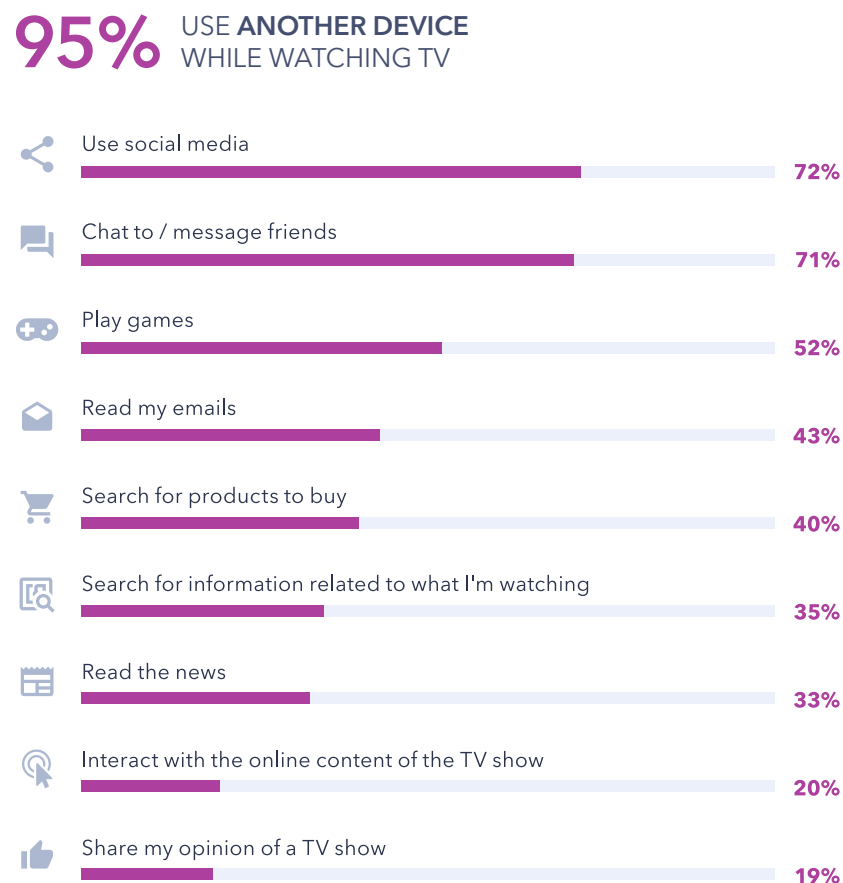
Given that this group are young and mobile-first, it's not surprising that social behaviors come top. **More than 70% are social networking or chatting to friends**, putting them about 14% ahead of the global average for both. This gives some context for why this audience are spending so much of their daily time on social networks and messaging services; a lot of this time is taking place simultaneously with other behaviors like watching TV.

**Gen Zs in APAC are 1.3x more likely than the average internet user to interact with the online content of a TV show; in Europe this audience is 30% less likely than average**

With gaming a key interest for this group, it's unsurprising that playing games (Index 1.38) is one of the top second-screening actions. But what is striking is that **the top activities tend to be a distraction from the content on the main screen, rather than a complement**. That said, 35% are searching for information related to what they're watching, and 20% say they interact with the online content of a TV show. Clearly, this group will be heading to social, chat and gaming apps rather than the official TV apps. It's worth noting that the rates of different second-screening activities are very similar when comparing Gen Zs to younger millennials, although younger millennials are slightly more likely to be reading the news, searching for products to buy, or sharing their opinion of a TV show.

**Second-Screen Activities**

*% who were doing the following while watching TV...*

## 95% USE **ANOTHER DEVICE** WHILE WATCHING TV

| Activity | % |
|---|---|
| Use social media | 72% |
| Chat to / message friends | 71% |
| Play games | 52% |
| Read my emails | 43% |
| Search for products to buy | 40% |
| Search for information related to what I'm watching | 35% |
| Read the news | 33% |
| Interact with the online content of the TV show | 20% |
| Share my opinion of a TV show | 19% |

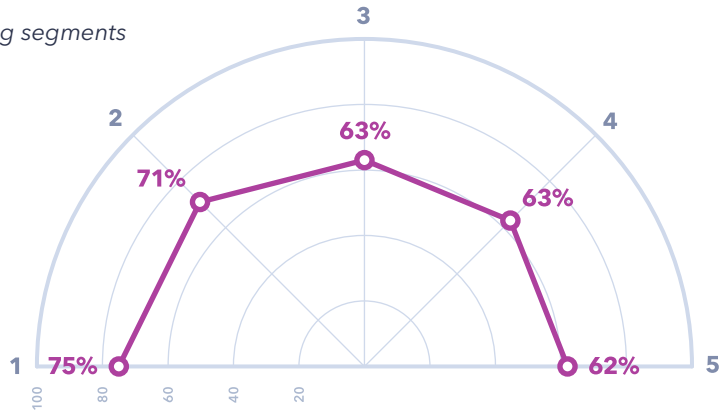> 89% of Gen Zs use a mobile as they watch TV

**Gen Z**

# Social Media Engagement

# Social Media Segmentation

**Social Media Segmentation**

*% who fall within the following segments*

**1.** Celebrity Networkers

**2.** Personal Networkers

**3.** Shoppers

**4.** FOMO Networkers

**5.** Brand Followers



**Reasons for Using Social Media: Top 3 Over-Indexes**

**27%** IDX 1.39

To follow celebrities/ celebrity news

**29%** IDX 1.29

To make sure I don't miss out on anything

**46%** IDX 1.22

To find funny or entertaining content

**75% of Gen Zs can be categorized as *Celebrity Networkers* – those that use social media to keep up with celebrities, celeb news, and follow actors, comedians, singers or TV presenters – 24% more likely than average.** Indeed, they are 1.4x more likely than the typical internet user to follow celebrities or celebrity news. Celebrities and 'influencers' have a huge space to work here to promote their own brand and gain extremely engaged followers. Kylie Jenner recently became the youngest 'self-made' billionaire; despite having an obvious head start with her surrounding family's successes, Jenner has very cleverly leveraged the huge opportunity that social media marketing represents. Marketing for her popular *Kylie Cosmetic* lip kits is done almost exclusively through social media, to Jenner's 130 million followers. She announces product launches, previews new items and announces new shades she's wearing directly to the 175 million-plus who follow her across Instagram, Snapchat, Facebook and Twitter.

> **"It's the power of social media... I had such a strong reach before I was able to start anything."**
>
> *Kylie Jenner*

While there has been a lot of talk of internet users, especially younger demographics, using social media less to connect and more to be entertained, 7 in 10 are *Personal Networkers*. These networkers go on social media to network, meet new people and generally follow people they know. The fact that Gen Zs are 29% more likely than average to say they use social media to make sure they don't miss out on anything is indicative of a group that aren't ready to take out the social aspect of social media.

A sizeable 6 in 10 Gen Zs can also be categorized as *Content Networkers* – those who use social media to find funny and entertaining content, follow sporting events or follow vloggers – and this is the second highest-indexing overlap with our social media segmentations (Index 1.18). Gen Zs have driven a general shift from written to visual content on social media, from which YouTube has greatly benefitted.

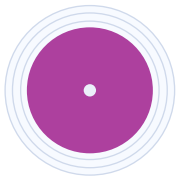For a full explanation of our social media segmentation, please click here

# Social Following

**Top People/Organizations Followed on Social Media**
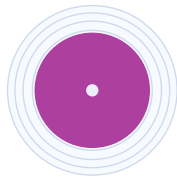
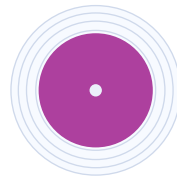*% who say they follow…*
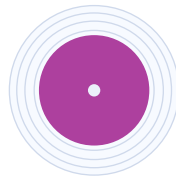
**56%** IDX 1.07

People you know
in real life

**47%** IDX 1.38

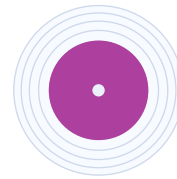Singers, musicians
or bands

**46%** IDX 1.40

Actors

**43%** IDX 1.12

Brands you like

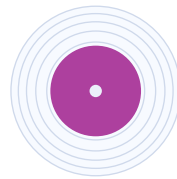**35%** IDX 1.35

Comedians

**30%** IDX 1.07

Brands you are
thinking of
buying from

**30%** IDX 1.22

Sports stars

**29%** IDX 1.30

Bloggers

**28%** IDX 1.51
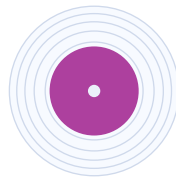
Vloggers

**27%** IDX 0.89
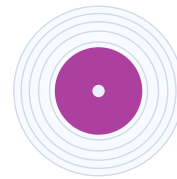
News/media
organizations

> With Gen Zs 1.5x more likely to be following vloggers on social media, there is clear opportunity for brands to reach this audience via influencer marketing

**Gen Z are happy to have content from their favorite brands appear on their newsfeed. 4 in 10 are following brands they like on social media, with 1 in 3 following the brands they are thinking of buying from.** Should brands appeal to this audience, they won't have to try too hard to get their content and merchandise in front of them. Meanwhile, with Gen Z 1.4x more likely to say they use social media to follow celebrities, it's unsurprising that we see them over-indexing pretty strongly for following actors (Index 1.40), singers/musicians (Index 1.37) and sports stars (Index 1.22). They're also considerably ahead of the curve for following vloggers (Index 1.51). And with 31% watching a video posted by a celebrity or vlogger on YouTube in the last month (Index 1.51), the potential for brands to reach this demographic via influencer marketing is plain to see.

# Top Social Platforms

## Top Social Platforms

*% who have an account or visit/use the following*

○ Have Account     ○ Visit/Use

89% ○ 88%  f

86% ○—○ 77%  ▶

80% ○○ 75%  📷

77% ○——○ 55%  💬

74% ○—○ 65%  ⬤

64% ○——○ 48%  🐦

52% ○——○ 36%  👻

39% ○○ 31%  📌

36% ○—○ 25%  in

36% ○○ 27%  S
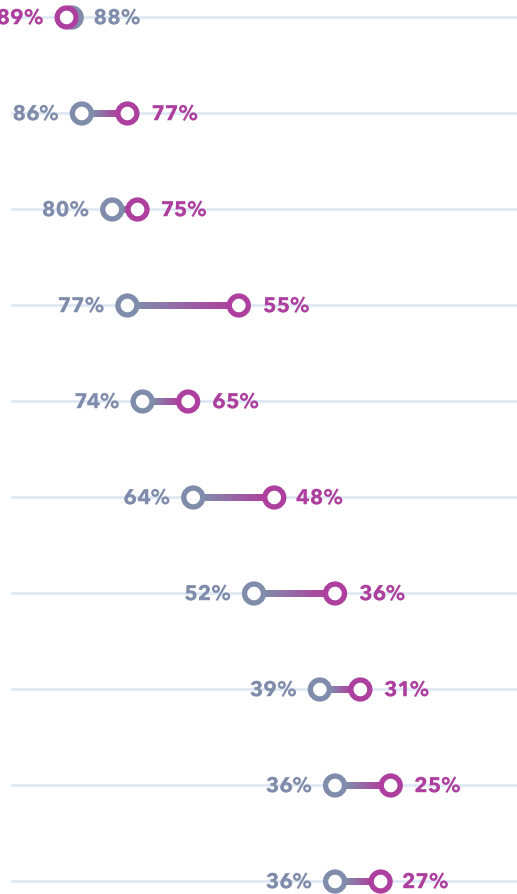
**Gen Z are spending an average of 2 hours and 52 minutes a day on social networks and messaging services.** With multi-networking firmly the norm, they're spreading their time across a range of different platforms.

**YouTube is the firm favourite among this audience, both in terms of having an account and visiting/using the site.** YouTube has an impressive 12-point lead over Facebook in terms of visitors/ users. In fact, using YouTube is almost universal, with 9 out of 10 Gen Zers visiting YouTube at least once a month, reiterating the importance of video and entertainment to this young audience.

There is often talk that Facebook has lost its relevance among younger consumers. While usage rates have dropped since Q4 2016 – where visiting rates hit a peak at 87% – **there is still a significant 77% of Gen Z who use Facebook every month**. And with Facebook owning 3 of the top 4 social platforms, their (lack of) relevance or staying power should be reconsidered.

A considerable 75% are using Instagram on a monthly basis, and they dominate the messaging service space, with Facebook Messenger and WhatsApp battling it out amongst themselves with little direct competition. Facebook is still a hub that underpins and drives social activities – **its challenge now is to incentivize consumers to post content themselves** rather than simply looking at things uploaded by others.

Although some way off the most popular platforms among Gen Z, Snapchat remains the highest-indexing service to use; Gen Zers are 1.5x more likely than average to have used Snapchat in the last month. Snapchat is particularly popular in mature, Western markets like Sweden, Ireland, France and the Netherlands, with monthly usage rates ranging from 70-85%.

## Membership: Top 3 Over-Indexes
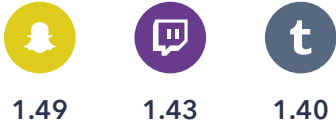
👻          ▶          t

**1.49**     **1.43**     **1.40**

**Gen Z**

# Commerce & Brand Engagement

# Online Shopping

**72% of Gen Zs say they have purchased a product online in the last month via any device.** M-Commerce has made a considerable impact among this group, with 6 in 10 purchasing on their mobiles. And although many still adopt a multi-device approach to their online shopping, there is clear indication that M-commerce dominates over other devices. Since Q4 2016, purchasing on a laptop has dropped by 32% among this audience, and purchasing on a tablet has decreased by 60%. Only 6% of Gen Zs are buying products on their tablets, and even tablet owners are more likely to be shopping on their mobiles.
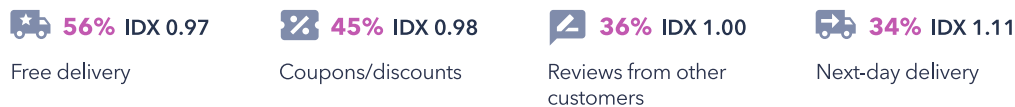
### E-Commerce by Device
*% who have purchased a product online via the following devices in the last month*

**72%** Any Device    **61%** Mobile    **32%** PC/Laptop    **6%** Tablet

## 41% have used their phone to pay for an item or service

### Top Online Purchase Drivers
*% who say the following would encourage them to buy something online*

**56%** IDX 0.97
Free delivery

**45%** IDX 0.98
Coupons/discounts

**36%** IDX 1.00
Reviews from other customers

**34%** IDX 1.11
Next-day delivery

In terms of purchase drivers, **free delivery has the biggest influence on their purchase decisions**; with an 11-point lead over all other options, the importance of this offering cannot be overstated. In terms of incentives like loyalty points and financial rewards (e.g. coupons and discounts), Gen Zers are actually only very marginally behind younger millennials in terms of caring about price and money-saving. And while there is much talk of e-commerce and the uptake among younger generations, only 14% say an option to use a 'buy' button on a social network (Index 1.14), ranging from 10% in Europe and North America to 17% in the Middle East and Africa.

## Apple's new credit card hoping young consumers value convenience and privacy over cash rewards
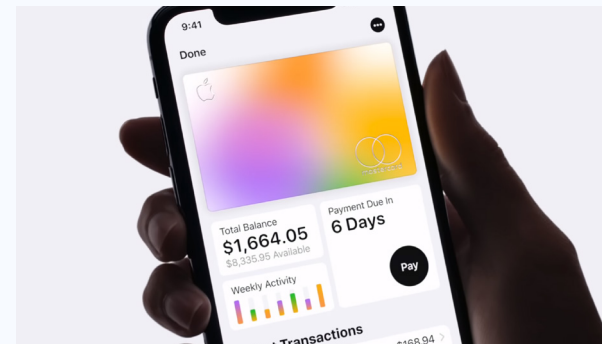


The so-called Apple Card does not contain a credit card number, expiration date or CVV code. This, as well as the addition of Apple Pay's face and touch ID security features embedded in the card, will make the card a lot safer against theft and fraud. Hoping for a transparent and frictionless approach to banking, Apple is aiming to convince Gen Zs to switch to them, despite the card's cash rewards that fall short of what more traditional cards offer. Placing itself among a new breed of 21st century digital banking start-ups like Revolut and Monzo, Apple Card is also providing users with purchase-tracking, spending snapshots and trend reports that make money management that much easier. However, with digital bank Revolut **to raise $500 million with the hopes of launching in the USA**, it remains to be seen whether Apple can conquer the mobile payments market.

# Brand Discovery

*% who find out about new brands or products via the following*

Ads seen online
**36%**

Search engines
**34%**

Ads seen on TV
**33%**

TV shows/films
**29%**

Word-of-mouth recommendations from friend or family members
**28%**

Ads seen on mobile or tablet apps
**28%**

Recommendations/comments on social media
**27%**

Brand/product websites
**25%**

Ads seen before online videos or TV shows start to play
**22%**

Consumer review sites
**21%**
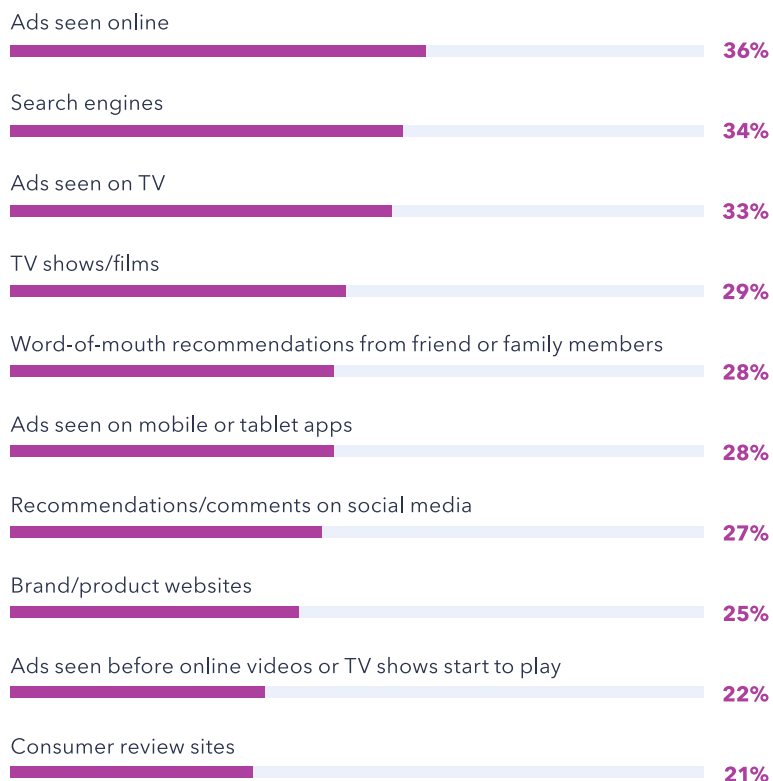
At the very start of the purchase journey, Gen Zs are most likely to hear about new products via ads seen online and search engines. **1 in 3 say they find brands via online ads.** Clearly, not every individual is blocking every ad on every site they visit – consumers are still being exposed to ads in some contexts. With TV ads not far behind in third place, this affirms the continued importance of more traditional brand promotion – even among this young and digitally-savvy audience.

**Influencer marketing and celebrity endorsements are bigger than ever.** The potential of this kind of advertising to reach Gen Z is plain to see here; 27% say they discover new products through recommendations seen on social media, and they over-index strongly for brand discovery via vlogs, celebrity endorsements and expert bloggers.

This is an audience that values the opinions of people in places of authority; whether that authority is based on popularity or expertise doesn't seem to matter too much to Gen Zs. The likes of Snapchat and Instagram Stories have been effective channels for many influencers wanting to send out a brief message to their following on a very personal level. In a *Think With Google* report, **70% of Gen Z YouTube subscribers stated they view YouTubers as more relatable than mainstream celebrities.**

## Top 3 Over-Indexes

**18%** IDX 1.38

Vlogs

**18%** IDX 1.25

Endorsements by celebrities or well-known individuals

**18%** IDX 1.18

Posts or reviews from expert bloggers

**Gen Zs in the Latin America region are the only respondents to over-index for discovering brands from brand/product websites (Index 1.32) and in-store product displays (Index 1.28)**
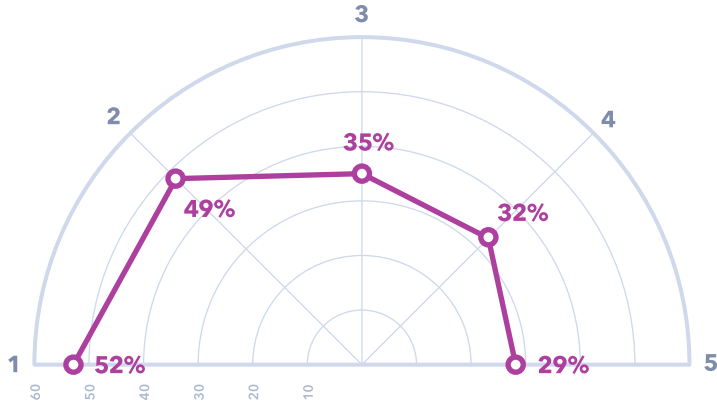
# Product Research

*% who use the following to find out
more about brands or products*

**1.** Social networks . . . . . . .  **IDX 1.18**

**2.** Search engines . . . . . . .  **IDX 0.92**

**3.** Mobile apps . . . . . . . . . .  **IDX 1.21**

**4.** Consumer reviews . . . .  **IDX 0.89**

**5.** Product/brand sites . . .  **IDX 0.86**



In line with the global trend, **social networks
have now firmly overtaken search engines
as the most popular destination for product
or brand research**.

## There is now a very blurred line between search and social

Relevant here is that this audience over-
indexes the most for the more digital options
like vlogs, micro-blogs and mobile apps.
Spending so much of their day on social
networks and apps, it's clear that they favor
being able to carry out search behaviors in a
very familiar space within a social platform.

**Top 3 Over-Indexes**

| **17%** IDX 1.36 | **16%** IDX 1.22 | **35%** IDX 1.21 |
|---|---|---|
| Vlogs (blogs in video form) | Micro-blogs (e.g. Twitter) | Mobile apps |

Almost triple the amount of Gen Zs in LatAm
(23%%) say they use vlogs for product research
compared to those in MEA (8%)

Gen Zs in APAC are 1.5x more likely than
the typical internet user to use micro-blogs
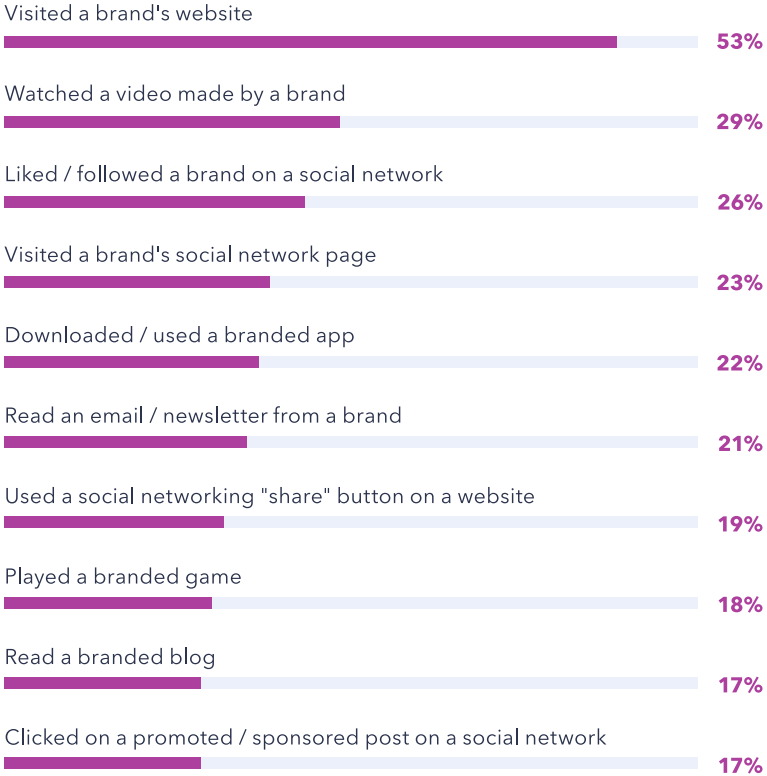such as Twitter for product research

# Brand Interactions

## Online Brand Interactions

*% who have done the following in the past month*

Visited a brand's website
**53%**

Watched a video made by a brand
**29%**

Liked / followed a brand on a social network
**26%**

Visited a brand's social network page
**23%**

Downloaded / used a branded app
**22%**

Read an email / newsletter from a brand
**21%**

Used a social networking "share" button on a website
**19%**

Played a branded game
**18%**

Read a branded blog
**17%**

Clicked on a promoted / sponsored post on a social network
**17%**

**Most of the top-cited brand interactions take place on social media.** Interestingly, more Gen Zs have watched a video made by a brand (29%) than liked or followed a brand on a social network (26%), or visited a brand's social network page (23%). Yet again, **this underlines the importance of creating captivating and relevant content that will make a brand's target audience aware of their story and message**, and hopefully drive increasing traffic to a brand's page. One particular way to gain a Gen Z consumer is to create a branded game; they are 35% more likely than the average internet user to have played a branded game in the past month, and 26% more likely to have downloaded or used a branded app.

**Gen Zs generally over-index for the 20 brand interactions that GlobalWebIndex currently tracks**

## Top 3 Over-Indexes

**IDX 1.35**

Played a branded game

**IDX 1.26**

Downloaded/used a branded app

**IDX 1.15**

Unliked/stopped following a brand on a social network

# Brand Advocacy

**With a focus on independence and originality, Gen Zs are not typically label focused**. Further, this population does not share millennials' appreciation for brand loyalty schemes; in a **study** by Ernst and Young, 45% of millennials reported they enjoyed loyalty programmes, but only 30% of Gen Zs felt these programmes were worth their effort.

Gen Zs care about the opinions of their peers and are, on the whole, more easily swayed compared to other generations. But this is very much a two-way deal: **6 in 10 regularly inform friends and family about new products, and just under half have posted a review of a product, company or service in the past month.**

**High-quality products are most likely to convince a Gen Z to become a brand advocate. Financial rewards score highly too, indicating that many would engage in advocacy when they see a clear value exchange.** This is much more the case for female Gen Zs compared to their male counterparts.

This is an audience who are always looking for better deals, free accounts and offers they can share with friends. Having hugely benefited from the likes of Uber, YouTube and AirBnB, as well as a host of on-demand service apps, Gen Z have come to normalize free content and so brands may need to do more than offer discounts or free gifts, but offer some form of long-term personalized benefit.

Indeed, access to exclusive content or services is the highest indexing motivator for advocacy (Index 1.22), followed by the feeling of taking part or being involved (Index 1.16). Creating a sense of exclusivity and making Gen Z feel valued and a part of your brand's community is a good start in fostering a positive consumer-brand relationship with this audience.

It's worth noting that 4 in 10 Gen Zs would be motivated to advocate simply out of love for the brand or service (Index 1.15). This is a sentiment that is particularly strong in the Middle East and Africa, where half of respondents say they would promote a brand for this reason (Index 1.48).

**47% have posted an online review of a product or company in the past month**

## Brand Advocacy

*% who say they would promote their favorite brand for the following reasons*

**49%**
High-quality products

**24%**
When something is relevant to my friends' interests

**43%**
Rewards (e.g. discounts, free gifts, etc)

**23%**
Access to exclusive content or services

**39%**
Love for the brand

**23%**
Having insider knowledge about the brand/products

**35%**
When something is relevant to my interests

**22%**
When I have a one-on-one relationship with a brand

**32%**
When I've received great customer service

**17%**
When something enhances my online reputation/status

**25%**
The feeling of taking part/being involved

# Notes on Methodology

All figures in this report are drawn from **GlobalWebIndex's online research among internet users aged 16-64**. Please note that we only interview respondents aged 16-64 and our figures are representative of the **online** populations of each market, not its total population.

### OUR RESEARCH

Each year, GlobalWebIndex interviews over 550,000 internet users aged 16-64. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers**. Each respondent who takes a GWI survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia, and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

### OUR QUOTAS

To ensure that **our research is reflective of the online population in each market**, we set appropriate **quotas on age, gender, and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the 'weight' of each respondent; that is, approximately how many people (of the same gender, age, and educational attainment) are represented by their responses.

### MOBILE SURVEY RESPONDENTS

**From Q1 2017 on, GlobalWebIndex has offered our Core survey on mobile.** This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

**Please note that the sample sizes presented in the charts throughout this report may differ** as some will include both mobile and PC/laptop/tablet respondents and others will include **only** respondents who completed GWI's Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, please download this **document**.

### GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q4 2018 wave of research across 45 countries, which had a global sample size of 138,962 respondents. The sample by market breaks down as follows:

| | GENERATION Z | | | GENERATION Z | |
|---|---|---|---|---|---|
| Argentina | 236 | 1,543 | Netherlands | 170 | 1,300 |
| Australia | 407 | 4,019 | New Zealand | 165 | 1,278 |
| Austria | 137 | 1,271 | Nigeria | 297 | 1,000 |
| Belgium | 149 | 1,279 | Philippines | 394 | 1,608 |
| Brazil | 363 | 2,314 | Poland | 210 | 1,801 |
| Canada | 245 | 2,265 | Portugal | 164 | 1,265 |
| China | 1,842 | 15,130 | Romania | 166 | 1,307 |
| Colombia | 225 | 1,473 | Russia | 185 | 2,211 |
| Denmark | 139 | 1,258 | Saudi Arabia | 216 | 1,473 |
| Egypt | 326 | 1,763 | Singapore | 412 | 2,737 |
| France | 569 | 5,095 | South Africa | 277 | 1,531 |
| Germany | 441 | 5,135 | South Korea | 132 | 1,268 |
| Ghana | 246 | 1,000 | Spain | 436 | 5,161 |
| Hong Kong | 202 | 1,821 | Sweden | 152 | 1,302 |
| India | 1,823 | 7,522 | Switzerland | 168 | 1,261 |
| Indonesia | 459 | 1,747 | Taiwan | 203 | 1,755 |
| Ireland | 157 | 1,239 | Thailand | 266 | 1,492 |
| Italy | 448 | 5,188 | Turkey | 351 | 1,632 |
| Japan | 129 | 1,800 | UAE | 135 | 1,755 |
| Kenya | 238 | 1,000 | UK | 1,058 | 10,201 |
| Malaysia | 237 | 1,535 | USA | 2,670 | 24,995 |
| Mexico | 523 | 2,641 | Vietnam | 201 | 1,591 |
| Morocco | 237 | 1,000 | | | |

**ACROSS GLOBALWEBINDEX'S MARKETS**

**GlobalWebIndex's research focuses exclusively on the internet population** and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

**Where a market has a high internet penetration rate, its online population will be relatively similar to its total population** and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the **lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated.** This is the case throughout much of LatAm, MEA and Asia Pacific.

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2019. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

**GLOBALWEBINDEX VERSUS ITU FIGURES**

As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

**Internet Penetration Rates**

GlobalWebIndex's Forecasts for 2019 based on 2017 ITU data

| Country | % | Country | % | Country | % |
|---------|------|---------|------|---------|------|
| Argentina | 78% | Indonesia | 39% | Russia | 80% |
| Australia | 88% | Ireland | 87% | Saudi Arabia | 83% |
| Austria | 88% | Italy | 62% | Singapore | 85% |
| Belgium | 89% | Japan | 92% | South Africa | 62% |
| Brazil | 71% | Kenya | 43% | South Korea | 95% |
| Canada | 94% | Malaysia | 83% | Spain | 87% |
| China | 59% | Mexico | 69% | Sweden | 96% |
| Colombia | 66% | Morocco | 69% | Switzerland | 96% |
| Denmark | 97% | Netherlands | 93% | Taiwan | 83% |
| Egypt | 54% | New Zealand | 93% | Thailand | 58% |
| France | 85% | Nigeria | 36% | Turkey | 71% |
| Germany | 88% | Philippines | 64% | UAE | 95% |
| Ghana | 48% | Poland | 79% | UK | 96% |
| Hong Kong | 91% | Portugal | 78% | USA | 80% |
| India | 42% | Romania | 72% | Vietnam | 55% |
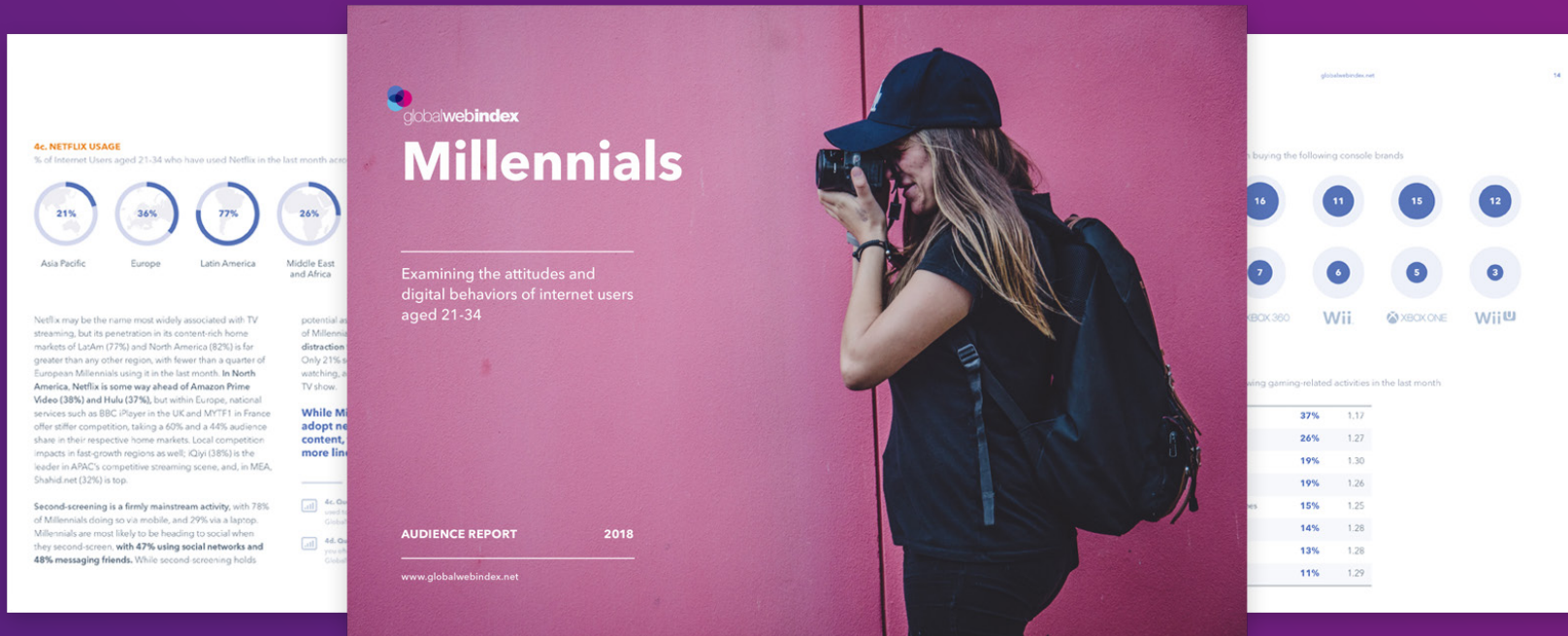
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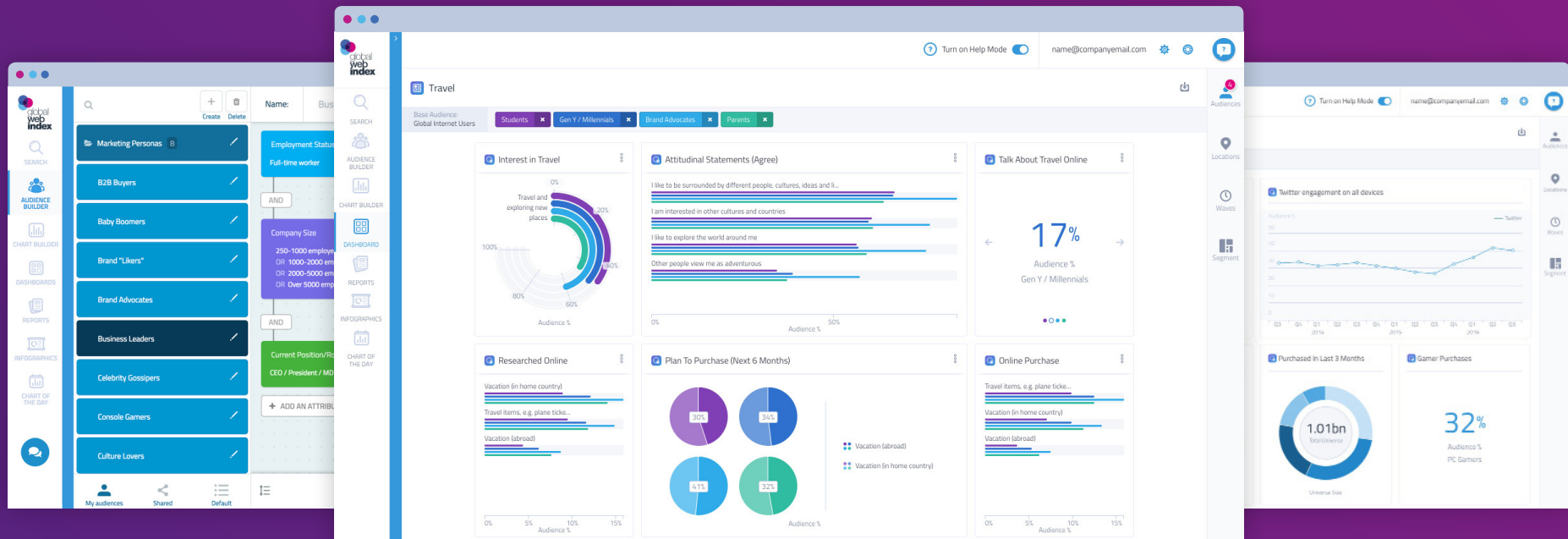
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