globalwebindex

Gen Z

Observing the latest trends on Gen Zs

AUDIENCE REPORT 2020

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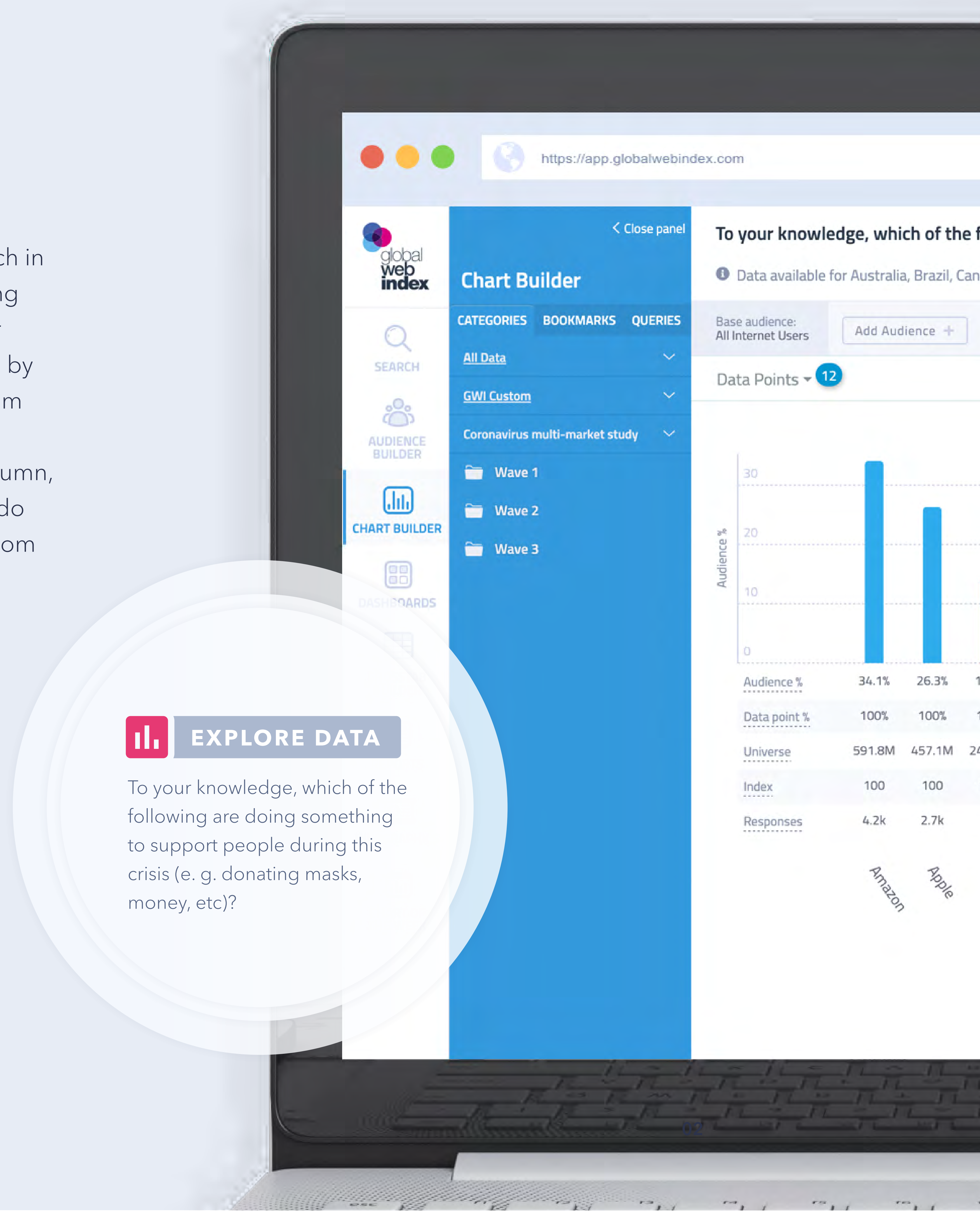
What's inside?

RECREATE CHARTS FOR YOURSELF

Each chart from our ongoing global research in this report contains a hyperlink that will bring you straight to the relevant question on our Platform, where you can investigate all data by demographics, over time and among custom audiences. You can find the corresponding question to each chart in the right hand column, starting from left to right. Any charts which do not contain a hyperlink are from a GWI custom study. Custom study data is not available to explore on our Platform.



Introduction

GlobalWebIndex Generation reports are designed to examine the digital behaviors of a particular generation – 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 16-23.

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 how do they feel about the future post-COVID?
- **Tech and Media –** Are Gen Z spending longer on streaming services and what's their favorite platform when doing so? What measures are they taking to protect their online privacy?
- **Gaming -** What devices are they gaming on and what do they want most from the games they play?
- **Social Media Engagement –** what are Gen Z's favorite social media platforms and how is TikTok changing the landscape?

Methodology

All figures in this report are drawn from GlobalWebIndex's online research among internet users aged 16-64. We only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population. Note that in many markets in Latin America, the Middle-East and Africa, and the Asia-Pacific region, low internet penetration rates can mean online populations are more young, urban, affluent and educated than the total population.

Each year, GlobalWebIndex interviews over 688,000 internet users aged 16-64 via an online questionnaire for our Core dataset. A proportion of respondents complete a shorter version of this survey via mobile, hence the sample sizes presented in the charts throughout this report may differ as some will include all respondents and others will include only respondents who completed GlobalWebIndex's Core survey via PC/laptop/tablet.

Throughout this report we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the global average. For example, an index of "1.20" means that a given group is 20% above the global average, and an index of "0.80" means that an audience is 20% below the global average.

Key insights

01

They've got big plans

Many Gen Zs are highly driven and altruistic. Describing themselves as ambitious and career-focused, they're 17% more likely than average to say they take risks. Around half say helping in the environment is important to them, while just under 4 in 10 say the same about contributing to their community or helping others.

02

They're switched on, but willing to unplug

Tech-savviness is considered a staple trait of young audiences, and this is certainly true of Gen Zs. However, they're aware of the risks associated with modern technology – they take steps to control their privacy more often than any other generation, and they're conscious of screen time too.

03

Gaming is a staple of Gen Zs

With 94% of all Gen Zs playing games on any device, they're the most active gaming generation. Social gaming is key to Gen Zs, with 44% playing games with their real-life friends in the last month. Due to their limited spending power, however, free games – of which 43% played or downloaded in the last month – hold more appeal than costly titles.

04

They're changing social media

YouTube remains the most popular platform for Gen Zs, but competition is growing. They don't necessarily want to broadcast personal details anymore. Instead, they want to be entertained together in a break from the traditional format.

05

They're misunderstood

Just 15% of Gen Zs say they feel represented in the advertising they see, meaning brands need to catch up. Traditional brands will have little success here, with Gen Zs being 16% less likely to want this of brands, preferring instead those that are young, trendy or funny.

01

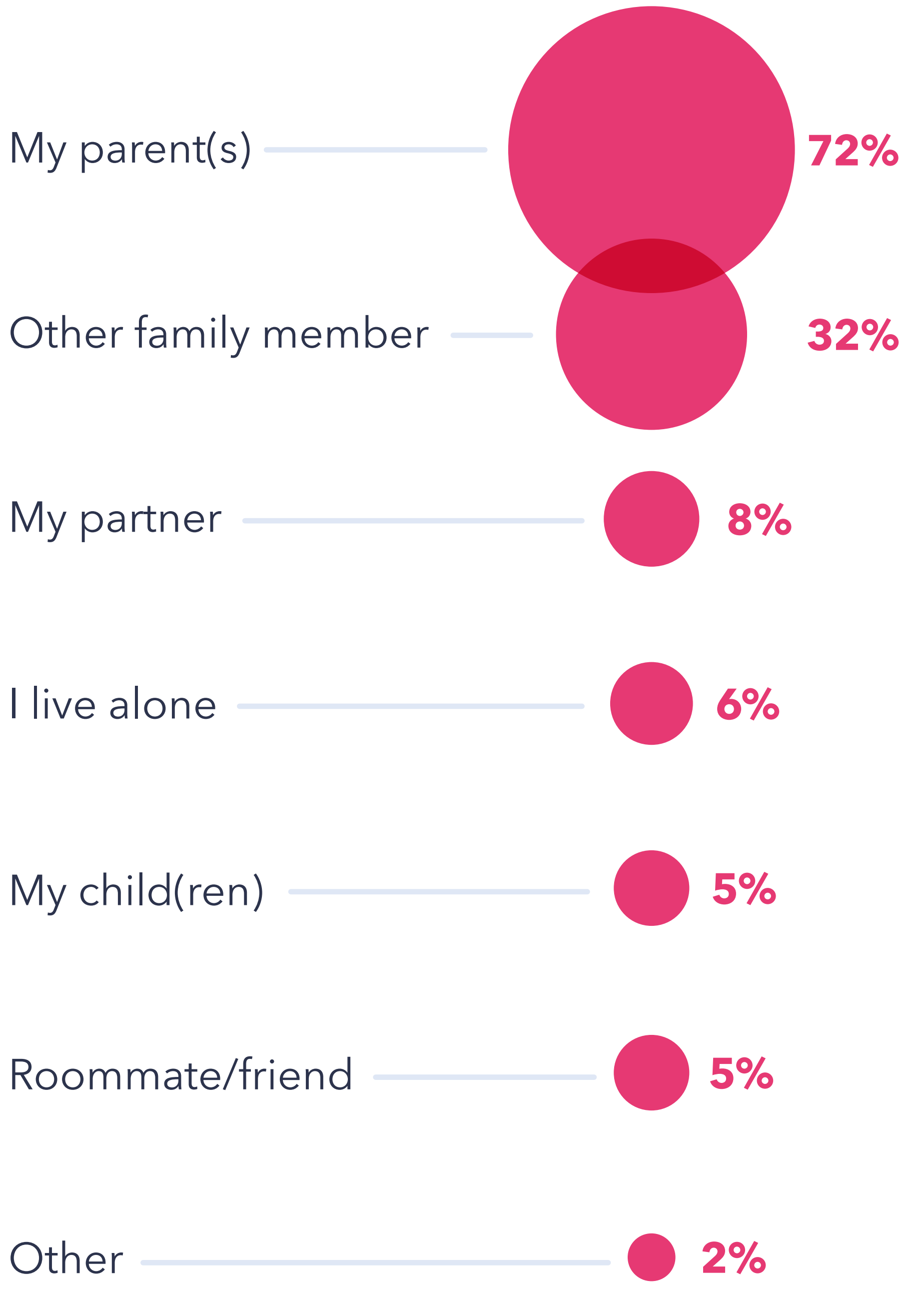
Gen Z

Gen Zs overview

Identifying Gen Z

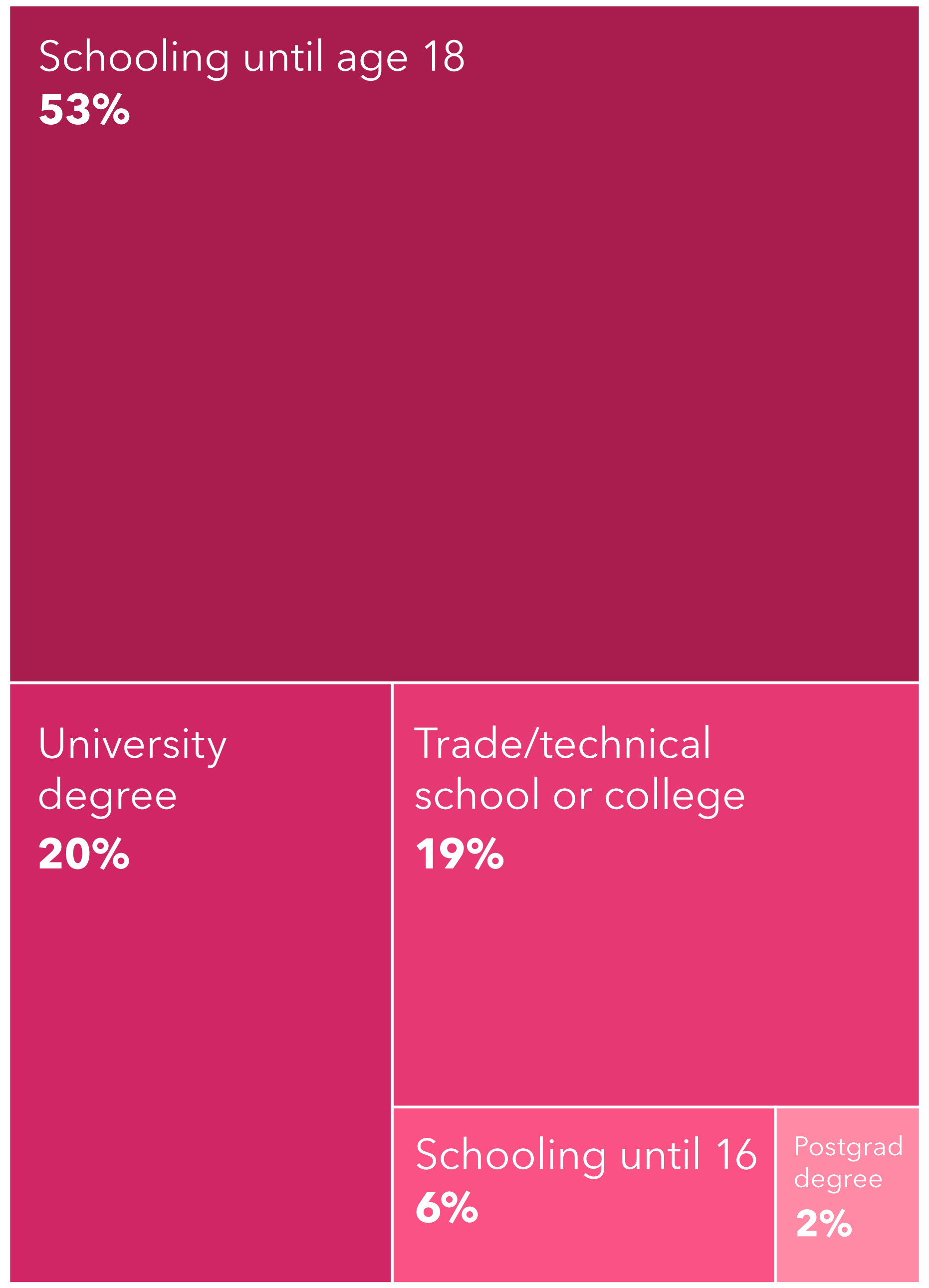
LIVING ARRANGEMENTS

% of Gen Zs who say they live with the following...



EDUCATION

% of Gen Zs who achieved the following level of education...



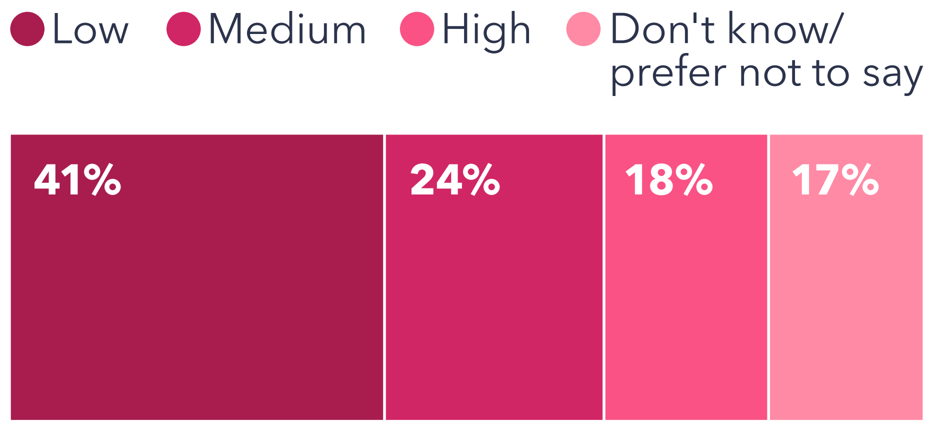
Coming of age in the information era, we generally label them as highly digitally-engaged; using a variety of social media platforms, music/TV streaming services and gaming devices. While this is certainly the case, their attitudes and activities online are beginning to reflect the growing concerns they face regarding an uncertain future.

Brands aren't just marketing to an audience of colorful, tech-savvy trendsetters anymore – they're dealing with vocal, informed users who want to change a world that's rapidly changed them.

Representing a quarter of all internet users, Gen Zs are likely to still be in full-time education, living with their parents and occupy the lower income segment

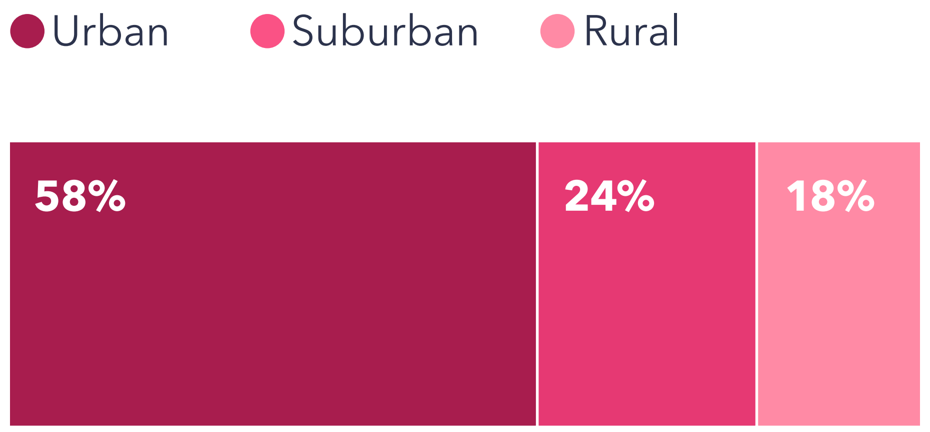
INCOME

% of Gen Zs who fall into the following income segments...



LIVING CONTEXT

% of Gen Zs who say their house is located in the following areas...



EXPLORE DATA

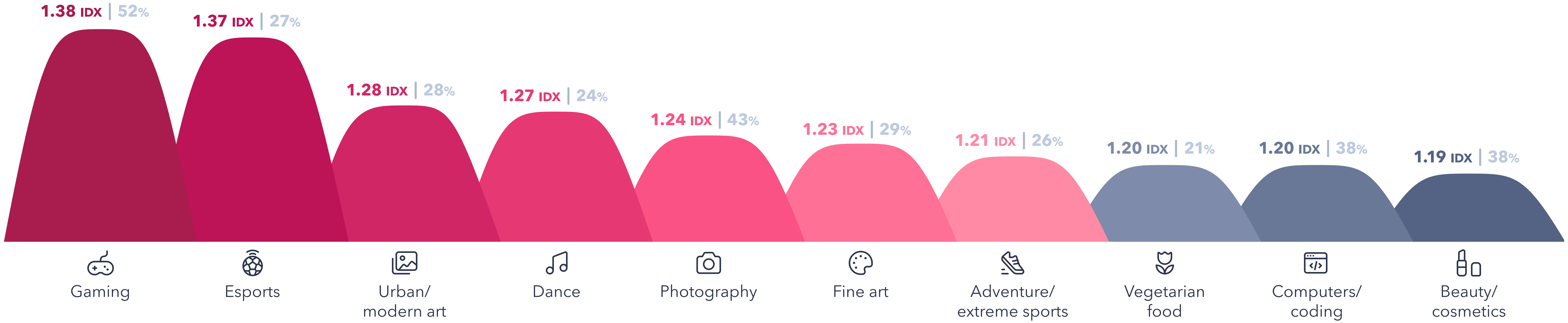
EXPLORE DATA

Question: Who lives in your household? | What best describes the highest level of education you have achieved? | Where is your household located?
Source: GlobalWebIndex Q2 2020
Base: 38,307 internet users aged 16-23

Interests & lifestyle

MOST DISTINCTIVE INTERESTS

% of Gen Zs who say they're interested in the following (sorted by over-index)



In general, **Gen Z's interests convey a creative and competitive nature**. They're more likely to be interested in esports and urban/modern art, while enthusiastic about cooking (49%) and playing sport (43%). In Europe, Gen Zs are 52% more likely to be interested in playing sport – even more so than gaming (IDX 1.39) – while in North America they're 10% less likely to say this.

Gaming is a staple of theirs – 63% are interested in the activity, 12 percentage points ahead of millennials. Gaming interest here is largely male dominated, with 62% and 37% interested in gaming and esports compared to 40% and 15% of females, respectively. Instead, female Gen Zs show more interest in beauty/cosmetics, with 66% saying this (40% more likely than the average female internet user).

They're anything but inactive, however, with 40% of Gen Zs interested in personal healthcare or fitness and exercise. This extends to an interest in health foods/drinks (50%) or alternative diets such as vegetarian food (21%). As a result, they perform any exercise regularly (49% do), with running/jogging (41%) or going to the gym (28%) frequent activities.

EXPLORE DATA

Question: Which of these things are you interested in?
Source: GlobalWebIndex Q2 2020
Base: 38,307 internet users aged 16-23

Attitudes & outlook

THE WORLD IS THEIR OYSTER

% of Gen Zs who say the following best describes them (sorted by over-index)

	IDX	
I take risks	1.17	34%
I am prone to anxiety	1.15	29%
I like to explore the world	1.14	55%
I like to be the first to try new things	1.11	39%
I take care of my appearance	1.07	47%
I am interested in other cultures/countries	1.06	49%
I believe all people should have equal rights	1.05	60%
I am comfortable talking about mental health	1.02	33%
I feel overworked	1.02	18%
I like to know what is going on in the world	1.00	51%

Commonplace among Gen Zs is their desire to see the world, but a top priority is doing so in their own way – 27% say standing out in a crowd is important to them, meaning **brands should reciprocate their desire for exclusivity**.

They're highly entrepreneurial, describing themselves as money-driven (28%), ambitious (39%) and career-focused (42%). They're also 17% more likely than average to say they take risks. But **this shouldn't be mistaken for self-centeredness; they want to better the world just as much as they want to better themselves**.

Around half say helping the environment is important to them, while just under 4 in 10 say the same about contributing to their community or helping others. While we look at their consumer attitudes later, it's worth noting that these attitudes largely come into play when purchasing from brands and therefore shouldn't be ignored.

What these ambitious and competitive values signal, is a heightened awareness of the increasingly challenging future this generation faces.

55% of Gen Zs would like to explore the world and 49% are interested in other cultures and countries

THEY'RE COMPETITIVE AND AMBITIOUS

% of Gen Zs who say the following are important to them (sorted by over-index)

	IDX	
Being successful	1.22	64%
Standing out in a crowd	1.20	27%
Challenging myself	1.19	50%
Feeling accepted by others	1.16	40%
Learning new skills	1.12	63%
Helping the environment	1.06	48%
Contributing to my community	1.05	37%
Helping others before myself	1.04	38%
My faith/spirituality	1.04	40%
Having a positive attitude	1.00	65%

EXPLORE DATA

EXPLORE DATA

Question: Which of the following things are important to you? | Which of the following do you feel describes you?
Source: GlobalWebIndex Q2 2020
Base: 38,307 internet users aged 16-23

Mental health

While just 7% of Gen Zs say they have a mental health condition, this rises to 22% in North America – where they're 73% more likely to say they're prone to anxiety. This number could be much higher though – with the exception of Europe and APAC, Gen Zs in other regions are **less likely than their older counterparts to be open about their mental health**.

Amid the ongoing pandemic these issues are growing fast. Many are already concerned for their reputation and appearance, and our custom research from September shows **1 in 3 say their mental or emotional wellbeing has become their greatest concern since the pandemic, with just under half citing their physical fitness**.

While these concerns vary by market, **they largely consider health issues their greatest priority**, especially in Europe. Gen Zs in Germany, for example, are over 2x as likely as the average user to say social isolation is their greatest concern, while in the UK, 46% say it's their friends and family's wellbeing.

While mental health concerns aren't limited to Gen Zs, they are certainly a concerned group **as the long-term effects of the pandemic take hold**. Just as high-risk audiences face ongoing health concerns from "**long Covid**", global economic decline is already changing Gen Z's outlook for the **foreseeable** future.

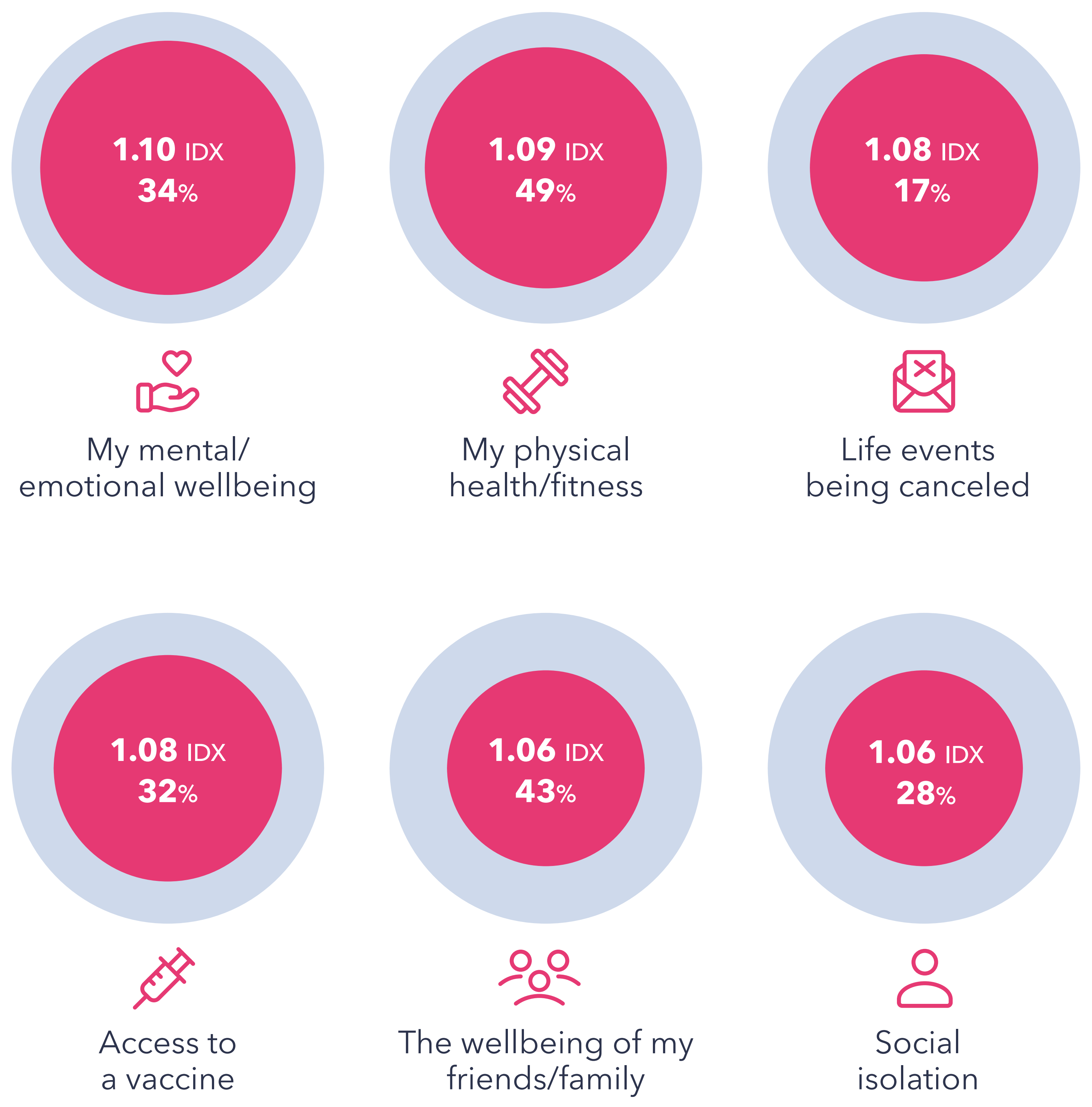
In Q1 2020, just 8% of Gen Zs said they expect their personal finances to get worse in the next 6 months; as of Q2 2020, this figure has doubled to 16%. Similarly, 33% say their country's economy will worsen in the same timeframe – having risen from 19% in Q1 2020.

While it may be some time before we can fully understand the outbreak's long-term **damage** on this generation, their short-term professional prospects will be heavily impacted.

Gen Zs are 37% more likely to have experienced feelings of panic since the beginning of the outbreak

GEN Z ARE FACING A NUMBER OF CONCERNS

% of Gen Zs, in 7 countries, who say the following things most concern them at the moment (sorted by over-index)



Question: Thinking about COVID-19, which of these things most concern you at the moment?
Source: GlobalWebIndex September 2020
Base: 762 Gen Z in 7 countries aged 16-23

02

Gen Z

Tech, device and entertainment

Tech behaviors

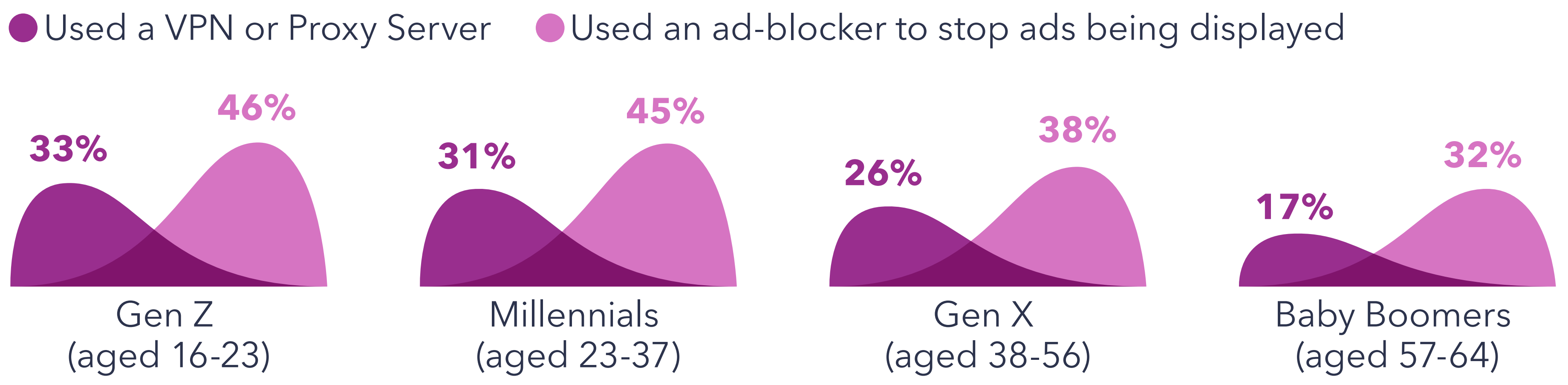
THEY'RE TECHNOPHILES, BUT ARE WARY OF OVERUSE

% of Gen Zs who say the following best describe them (sorted by over-index)

I worry I spend too much time on social media	1.35 IDX	36%
I worry I spend too much time on my smartphone	1.29 IDX	39%
I feel using social media causes me anxiety	1.10 IDX	16%
I prefer being anonymous online	1.03 IDX	31%
I am comfortable with my apps tracking my activity	1.02 IDX	26%

THEY TAKE PRIVACY SERIOUSLY

% of internet users in these generations who did the following in the last month



Generally, tech-savviness is considered a staple trait of young audiences, and this is certainly true of Gen Zs, 44% of which say they are comfortable using the latest technology. While they're more or less on par with millennials in this regard (45%), Gen Zs display more self-awareness of their relationship with technology.

They're concerned about their time spent on social media and smartphones, and are 10% more likely than average to say social media causes them anxiety. We know how important mental health is to Gen Zs, with social media often attributed to its rising prominence.

Furthermore, **Gen Zs are aware of the risks associated with modern technology** – they prefer to be anonymous online and take steps to control their privacy more often than any other generation we track.

Brands should take note of these behaviors and remember that, given the chance, **Gen Zs will always opt for retaining their privacy over trading it**. Just 1 in 4 feel in control of their data online and 6 in 10 say they would rather keep their data than exchange it for free services.

But with 1 in 4 using technology and **1 in 3 turning to social media in order to support their mental wellbeing**, Gen Zs aren't necessarily straying from technology entirely. In fact, just less than 4 in 10 say they feel social media is good for society, meaning it's a case of balancing their use in the everyday.

EXPLORE DATA

EXPLORE DATA

Question: Which of the following do you feel describes you? | In the last month, which of these have you done?
Source: GlobalWebIndex Q2 2020
Base: 38,307 internet users aged 16-23

Device usage and time spent

Gen Zs generally keep smaller device portfolios compared to their older counterparts, with many devices unable to compete with smartphones' versatility.

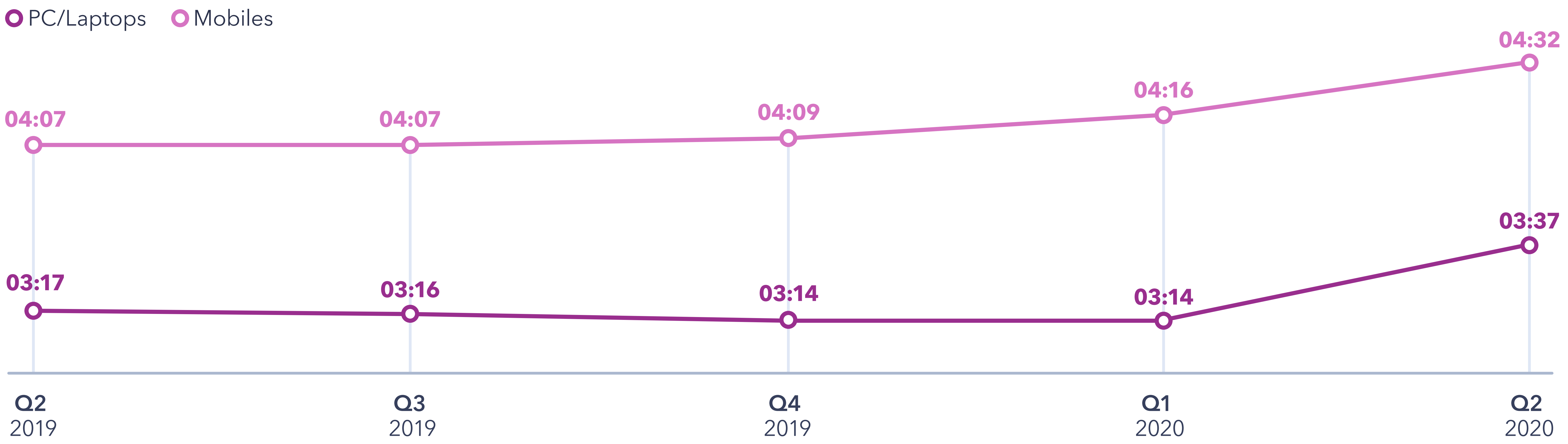
But there are small shifts at play thanks to the pandemic, particularly for PC/laptops. **Increased time at home brought with it increased time spent on PCs and laptops per day, jumping from 3 ¼ hours in Q1 2020 to well over 3 ½ hours in Q2 2020.**

This is largely a product of circumstance, however. Early indications from Q3 research show this to have fallen back toward levels seen before the pandemic.

Although Gen Zs are 20% less likely than average to purchase new tech products on release, over half say they intend to purchase a new mobile in the next year

TIME SPENT ON PC/LAPTOPS VS MOBILES

Gen Z time spent per day on the following devices in hh:mm



EXPLORE DATA

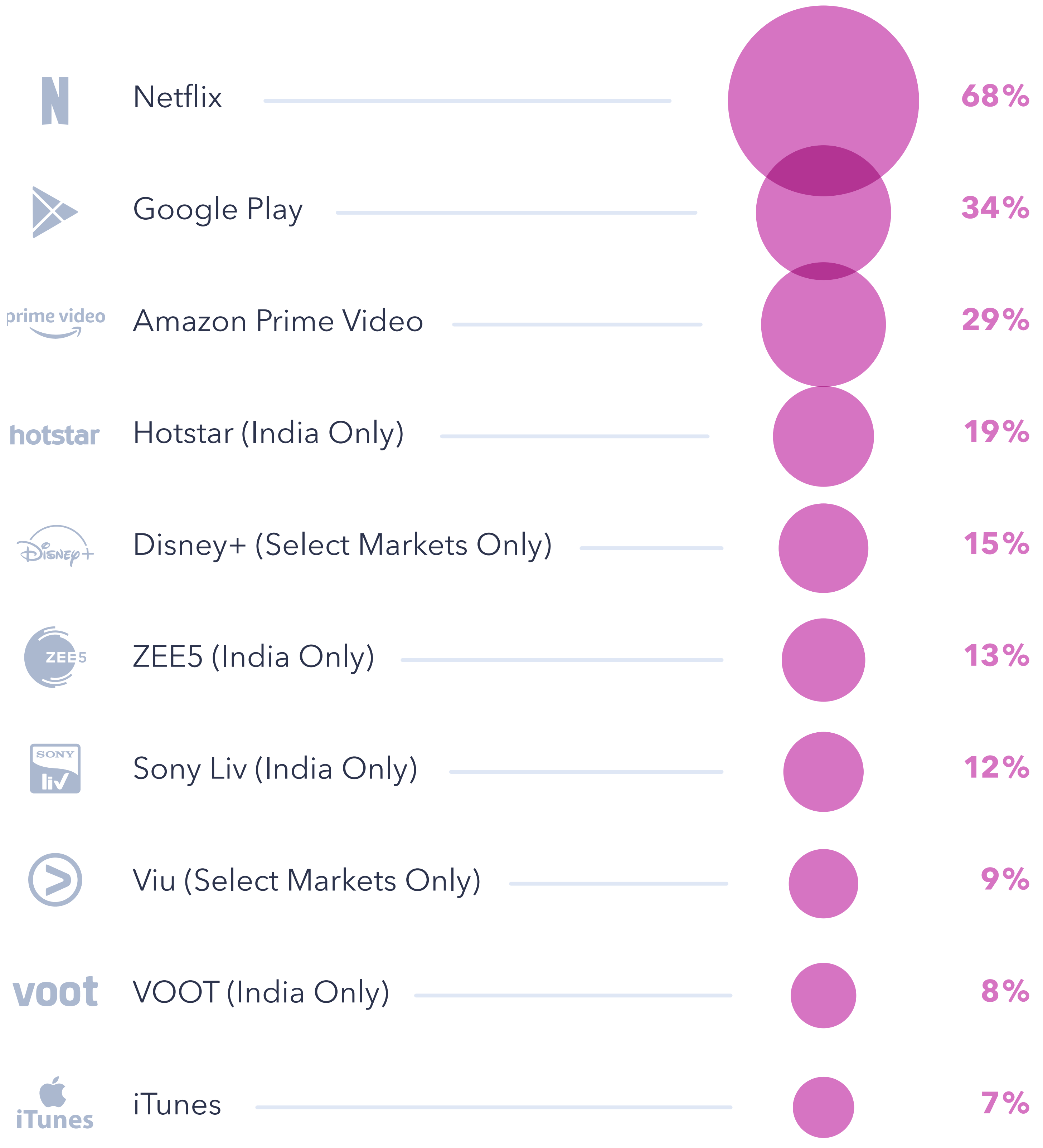
EXPLORE DATA

Question: On an average day, how long do you spend online on mobiles, PC/Laptops?
Source: GlobalWebIndex Q2 2019 - Q2 2020
Base: 162,676 Gen Z aged 16-23

Media & streaming

TV STREAMING SERVICES

% of Gen Zs outside of China who say they use the following to watch/download TV shows and films



Gen Zs now spend over 8 hours a day online, climbing steadily since Q2 2019 and experiencing a huge jump since Q1 2020. Again, the COVID-19 pandemic is largely responsible. Their strong engagement with subscription services is a clear indication of this, with around 4 in 10 using them at least 4-5 times a week.

From March to July, our research into the impact of COVID-19 showed **around 60% of Gen Zs in 13 markets spent more time watching shows/films on streaming services**. That translated into around 1.5 hours a day watching online TV or streaming services, with 50% of Gen Zs using PC/laptops to do so, and 42% using their mobile.

The most popular streaming service for Gen Zs is Netflix, with 68% using the service each month. While this remains the case globally, in APAC the competition is more fierce thanks to Chinese homegrown services, with just 38% watching Netflix against 32% on rivals iQiyi and 30% using Google Play.

True to their reputation, **they're rewriting the rules on how we watch TV based on their desire to get what they want, when they want it**. Just under half say they watch episodes back-to-back, making them frequent binge watchers. As we explore later, this shift from appointment viewing is reflected in the effectiveness of TV ads across the generations.

EXPLORE DATA

Question: In the last month, which of these services have you used to watch / download TV shows, films or videos?
Source: GlobalWebIndex Q2 2020
Base: 33,549 Gen Z aged 16-23

• TREND IN ACTION •

Better together

Gen Zs are at the height of their social lives, and lockdowns left many unable to commit to the group activities they take for granted. As a result, individuals took to conference call tools or the Houseparty app, which saw a reported **50 million** additional users amid the height of lockdown.

Learning from the social isolation witnessed in March, streaming services are introducing social-viewing options on their platforms.

Whether this is via Netflix's **Teleparty** feature or Disney+'s **GroupWatch**, viewers can stream content simultaneously with their friends to replicate the social experience.

This may very well become a staple in gaming too, with the **acquisition** of Houseparty by Fortnite developers Epic Games, signalling a possible use of video tools in the Battle Royale title and other popular online games.

Gaming behaviors

MOST DISTINCTIVE GAMING ACTIVITIES

% of Gen Zs who say they did the following gaming activities in the last month

	%	IDX
Played a game online with your real-life friends	44%	1.46
Played or downloaded a free-to-play video game	43%	1.27
Watched a live gaming stream	24%	1.56
Shared an image/video of your gameplay online	18%	1.50
Watched an esports tournament	18%	1.45
Purchased an in-game item/feature using a micro-transaction	14%	1.37
Purchased a video game from an online store/digital platform	12%	1.27
Played a game using cloud gaming platform/streaming service	9%	1.15
Used a subscription service such as XBOX LIVE, PlayStation Plus or Steam	8%	1.07
Purchased a game add-on or DLC	8%	1.19
Purchased a physical video game	7%	0.97
Broadcast a live stream of your gameplay	5%	1.15

With 94% of all Gen Zs playing games on any device, they're the most active gaming generation. **Females in this generation are keen gamers, with 92% saying they do so**.

Gaming is predominantly performed on smartphones – 85% say this – but 2020 presents a unique opportunity for other devices to return to the fold.

Gaming on PC/laptops fell from 59% in Q1 2019 to 48% in Q1 2020, but increased gaming behavior over lockdown is quickly breathing new life into these devices. Over half of Gen Zs now game on these devices in Q2 2020, giving more context as to the increased time spent on them during the pandemic.

At the same time, console use has declined slightly, but the arrival of Sony's PlayStation 5 and Microsoft's Xbox Series X in November may swing the tide here. In fact, 45% of Gen Zs are interested in purchasing either of these devices with an additional 24% interested in the Nintendo Switch.

Social interaction is key in Gen Z gaming behavior, with 44% playing games with their real-life friends in the last month. Due to their limited spending power, free games – of which 43% played or downloaded in the last month – are far more appealing than sometimes costly titles. **A perfect combination of the two are** **Battle Royales**, played by 35% of Gen Zs in the last year. In addition to attracting millions of regular players, the advertising **opportunities** are not just plentiful, but versatile – having made virtual **concerts** a staple of modern gaming.

Building on this, brands can reach Gen Zs not just playing games, but watching them. Over 40% of Gen Zs have either watched a live gaming stream of esports tournament in the last month, where influencer or branded content has long been necessary to this **$1 billion industry**. It's worth noting Gen Z privacy and ad-blocking behaviors here, however, meaning brands should plan **accordingly** when approaching this opportunity.

EXPLORE DATA

Question: Thinking about gaming, which of these things have you done in the last month?
Source: GlobalWebIndex Q2 2020
Base: 38,307 Gen Z aged 16-23

• **TREND IN ACTION** •

Branded games

Gaming is a highly tribal activity. Brands need to show gamers they reciprocate their attitudes and lifestyles, but finding them amid a sea of franchises, genres, and devices can prove a challenge.

Branded games – used by 19% of Gen Zs in the past month – provide a solid means of achieving this, with the likes of **Estée Lauder** even trialling this method to target gamers within their consumer base with more precision.

Other brands have been quick to make use of branded games, not just for ad-opportunity, but for attracting attention to a wider cause. Around 3 in 10 Gen Zs say brands should support charities, and those who can appeal to this and their huge gaming interest – as seen in Schick Xtremes "**Shave the Day**" campaign – are sure to make an impact.

Gen Zs in the UK and U.S. are 42% more likely to play branded games if there is online multiplayer

03

Gen Z

Social media

Gen Z social landscape

While we've established that Gen Zs are becoming increasingly aware of their time spent on social media, the truth is, its use is continuing to climb. In wave 1 of our coronavirus research fielded **in March, 58% of Gen Zs in 13 markets said they were spending more time on social media, and this remained unchanged by wave 5 in July.**

Their platform usage habits have shifted slightly. Since Q1 2019, there's been small indications of their attention moving from the platforms with the strongest reach, over to the likes of WhatsApp, Snapchat and Instagram – the latter of which overtook Facebook in Q2 2019.

Even so, **YouTube remains the most popular platform globally. Gen Z's frequent interaction with vloggers is essential to the platform's success**. This is an audience who are as likely to watch vlogs each month as they are to watch TV on-demand services (around 60% do). Gen Z YouTubers are 32% more likely to watch videos from vlogs or celebrities on the site (42% say they do).

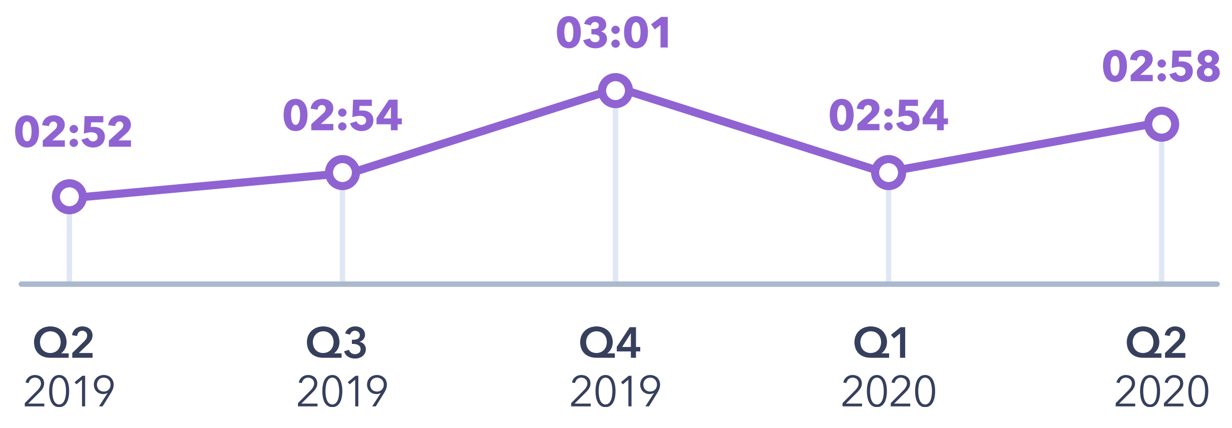
But competition is growing through two popular features: stories and gaming. The former – initially introduced to Snapchat in 2013 – make for among the most distinctive actions on Facebook (IDX 1.19), Instagram (IDX 1.37) and Snapchat (IDX 1.35) from Gen Z users outside of China.

Around **86 million users** subscribe to gaming-related videos on YouTube – with around 3 in 10 Gen Z users, outside of China, watching a gaming livestream or game trailer on YouTube in the last month. However, the site's varied content means **rival sites** have stepped up to cater for this generation's affinity for gaming. Twitch, for example, used by 15% of Gen Zs in the past month, is often credited to the **discontinuation** of YouTube Gaming in 2019, while Facebook Gaming's popularity **continues** to climb.

Gen Zs in Latin America spend around 4 hours a day on social media

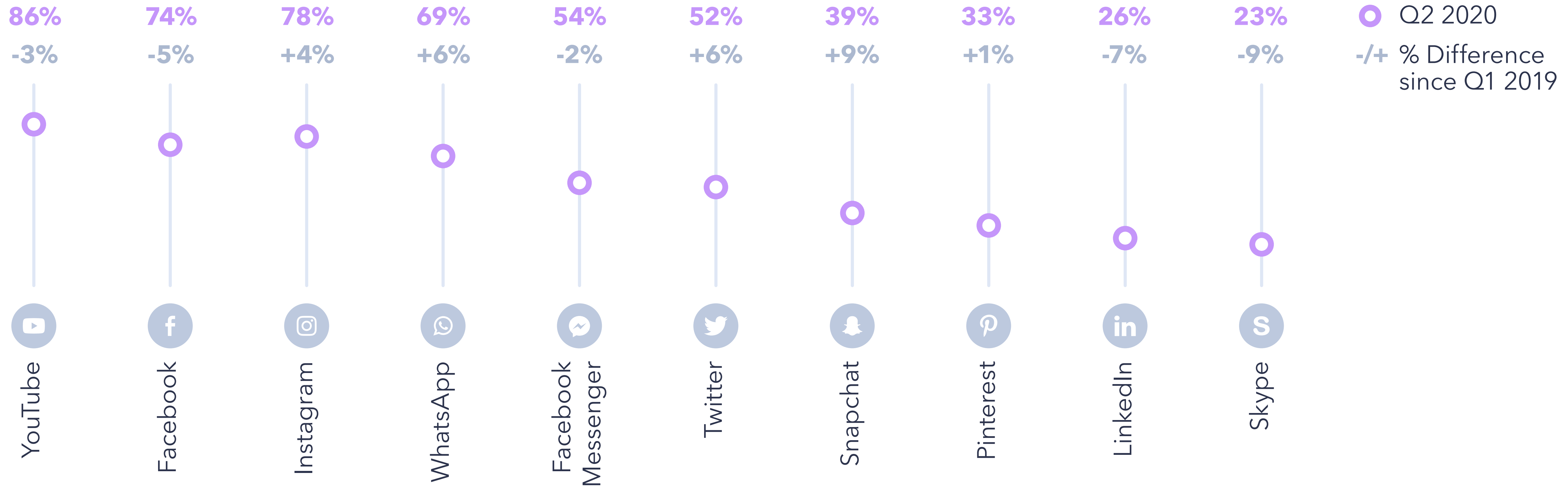
SOCIAL MEDIA USE OVER TIME

Gen Z time spent on social media per day in hh:mm



SOCIAL MEDIA VISITORS/USERS OVER TIME

% of Gen Zs, outside of China, who visited/used the following platforms in the past month



EXPLORE DATA

Question: On an average day, how long do you spend on social media? **Source:** GlobalWebIndex Q2 2019 - Q2 2020 **Base:** 162,676 internet users aged 16-23

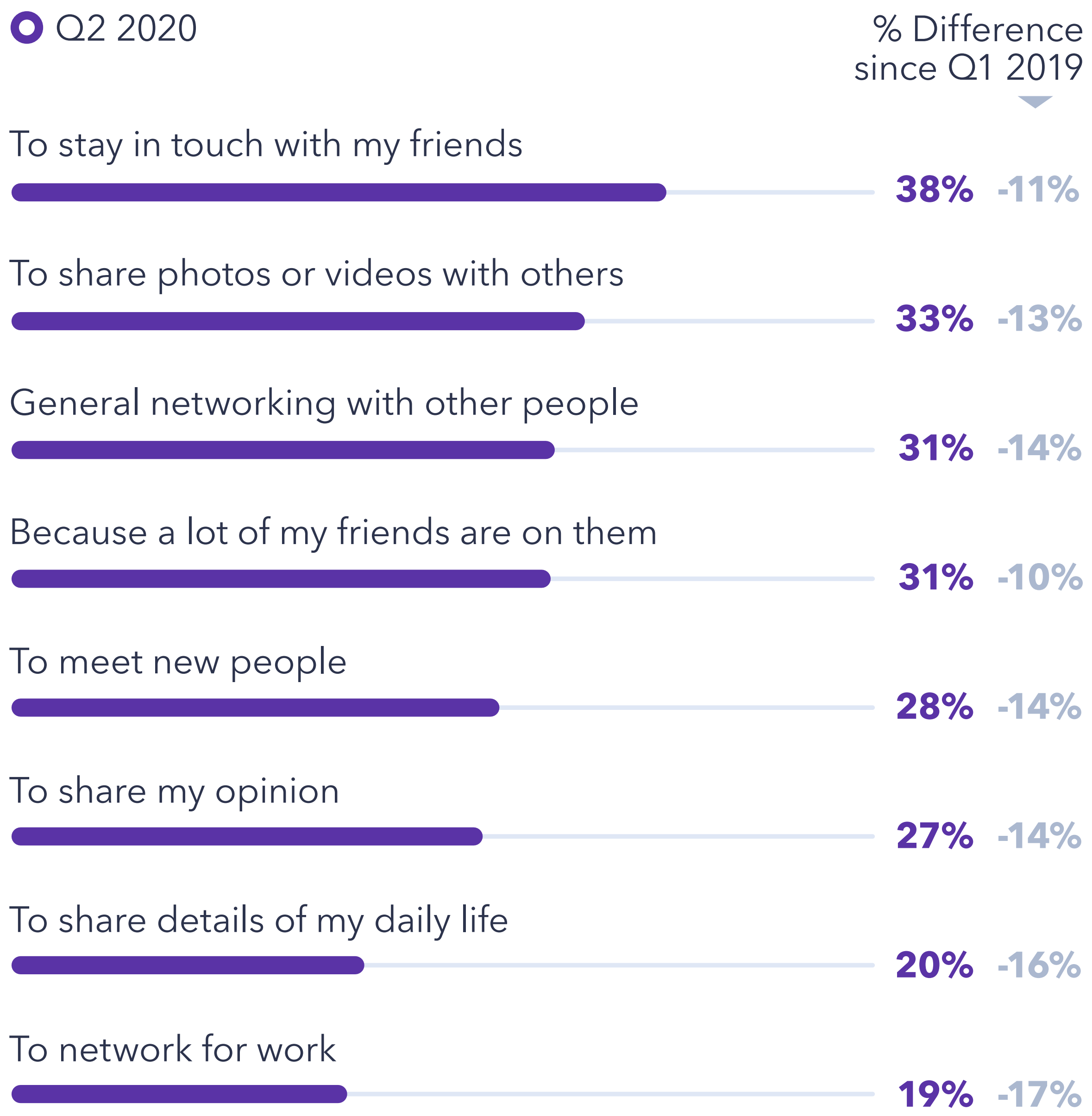
EXPLORE DATA

Question: Which of the following sites/applications have you visited or used in the past month via your PC/ Laptop, Mobile or Tablet? **Source:** GlobalWebIndex Q1 2019 - Q2 2020 **Base:** 55,957 internet users aged 16-23

Reasons for social media use

UNSOCIAL MEDIA

% of Gen Zs who use social media for the following social reasons



For Gen Z, social media is a chance to fill up spare time and find entertaining content, but their primary reasons for using these sites have declined across the board – particularly social interaction.

Since Q1 2019, meeting new people and opinion sharing as reasons for use have each fallen by 14%, while sharing personal details and networking for work have fallen by 16% and 17%, respectively. Though Gen Z remain more likely to perform these actions than all other generations, their rising tech-consciousness and love of social gaming suggests this is quickly changing their perception of social media.

Facebook has seemingly been aware of this for sometime now, ramping up its **acquisition** of tech startups over the past few years in an effort to get **Facebook Horizon** over the line. **But Gen Zs don't necessarily want social media to become an environment where they share their details together, instead, they want to be entertained together** in a break from the traditional format.

Their increased use of Instagram, Snapchat and WhatsApp are signals of this – as is their enthusiasm for stories and interactive content – but it's TikTok that's the real game-changer.

MOST DISTINCTIVE REASONS FOR USING SOCIAL MEDIA

% of Gen Zs who say they use social media for the following reasons (sorted by over-index)

To follow celebrities/ celebrity news	To make sure I don't miss out on anything	To fill up spare time
1.36 IDX	1.34 IDX	1.31 IDX
23 %	26 %	46 %

EXPLORE DATA

Question: What are your main reasons for using social media?
Source: GlobalWebIndex Q1 2019 & Q2 2020
Base: 25,475 (Q1 2019) & 38,307 (Q2 2020) Gen Z aged 16-23

#TikTok

TikTok, formerly musical.ly, was once a short-form video app reminiscent of Vine, discontinued in 2017.

But just as millennials popularized the latter, a 19-percentage-point rise since Q3 2019 saw Gen Z users, outside of China, propel the ByteDance-owned app into a global phenomenon. **Despite the clear popularity among Gen Zs, however, other generations are also flocking to TikTok**, with millennials' and Gen X's use of the app growing 15 and 11 percentage points, respectively, in the same timeframe.

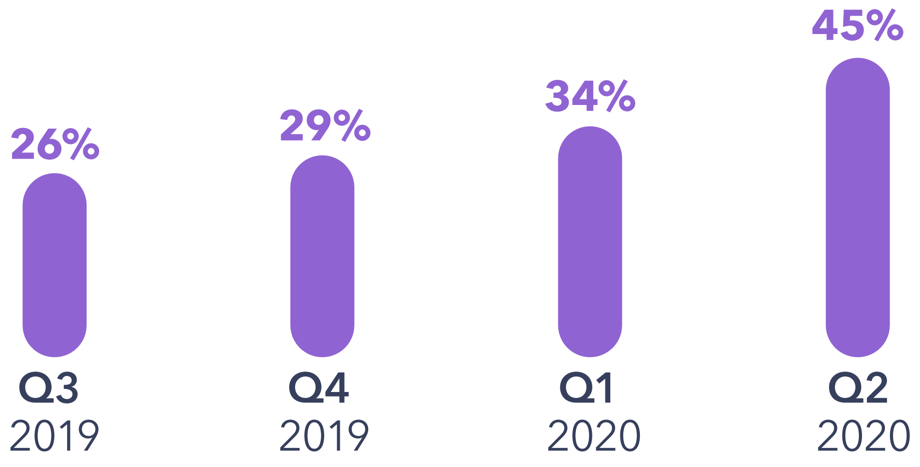
Why it's synonymous with younger generations however, is because of how they're using it. Around 1 in 4 Gen Z and millennial TikTok users in the UK and U.S. say they use it to discover new music or to express themselves. An additional 1 in 3 follow singers, musicians or bands. This has helped artists such as Lil Nas X, Benee and Sam Fischer rise to fame, and our data confirms Gen Zs' distinctive preference for the Rap (IDX 1.80), Indie Pop (IDX 1.55) and Hip-Hop (IDX 1.43) genres.

As TikTok puts pressure on music-streaming services, Spotify is experimenting with features that allow users to accompany their music with short videos in a similar manner to TikTok's UI. **TikTok, meanwhile, is well-placed to compete with the likes of Instagram**, introducing interactive links through its live feature in the same manner the former did with stories.

The number of Gen Zs in Europe who use TikTok daily grew by over 250% in 2020

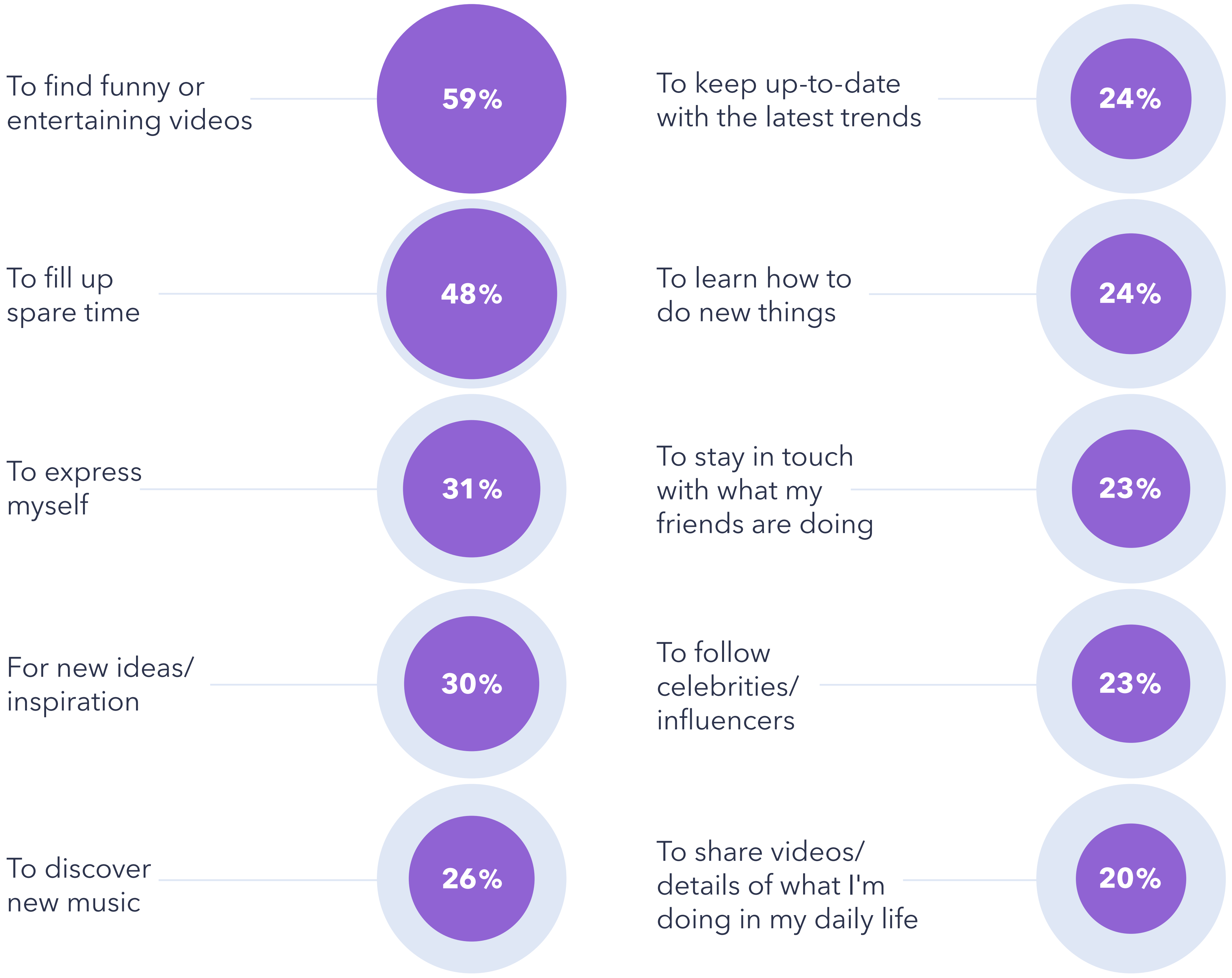
TIKTOK USE OVER TIME

% of Gen Zs, outside of China, who visited/ used TikTok monthly



TOP REASONS FOR USING TIKTOK

% of UK/U.S. Gen Z and millennial TikTok users who use it for the following reasons



EXPLORE DATA

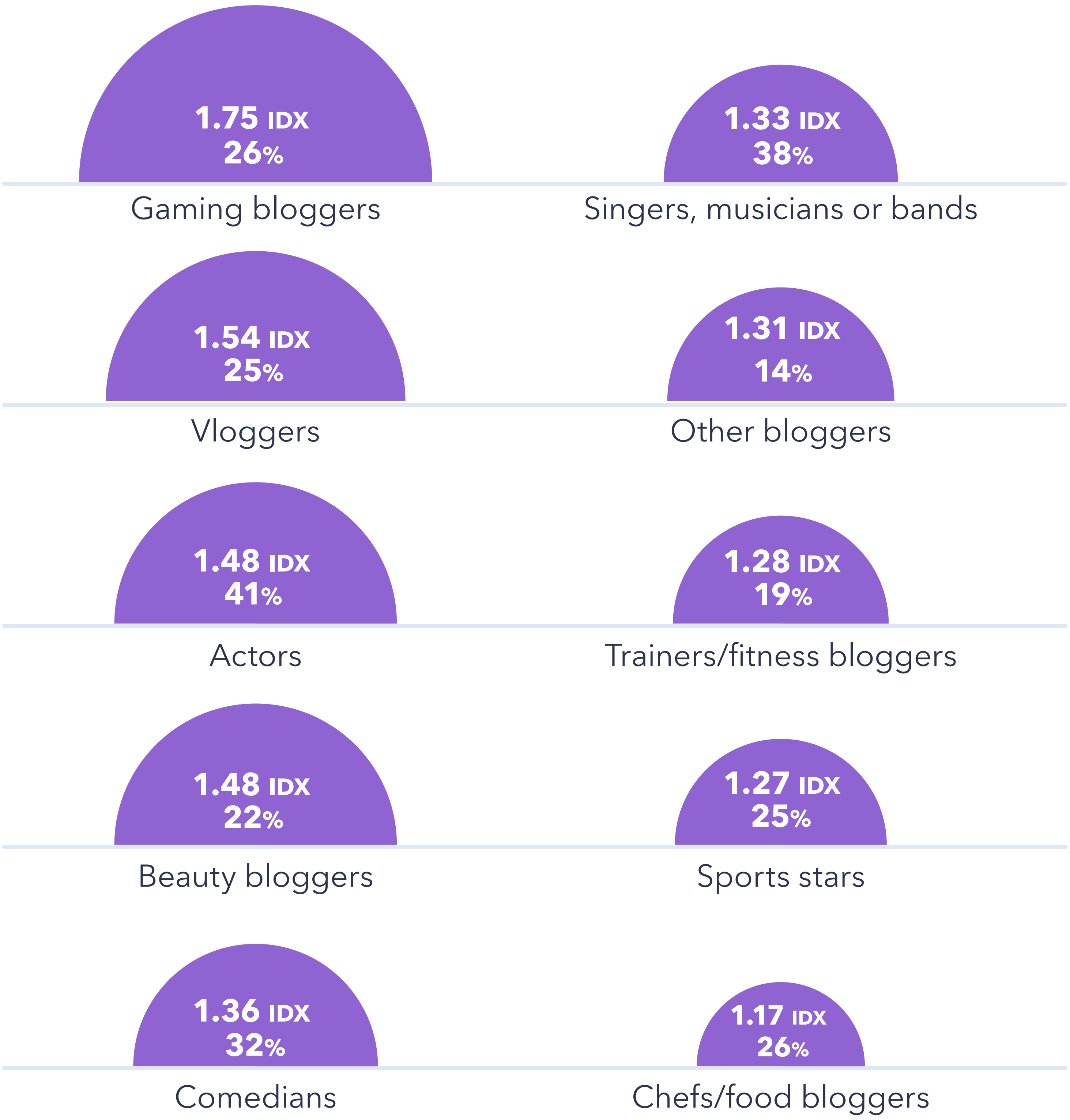
Question: Which of the following sites/ applications have you visited or used in the past month via your PC/Laptop, Mobile or Tablet? (TikTok)
Source: GlobalWebIndex Q3 2019-Q2 2020
Base: 120,330 Gen Z's aged 16-23

Question: What are the main reasons you use TikTok?
Source: GlobalWebIndex June 2020
Base: 200 Gen Z and Millennial TikTok users aged 16-34

Social following behaviors

BLOGGERS ARE FRONT AND CENTER...

% of Gen Zs who say they follow these account types on social media in the last month (sorted by over-index)



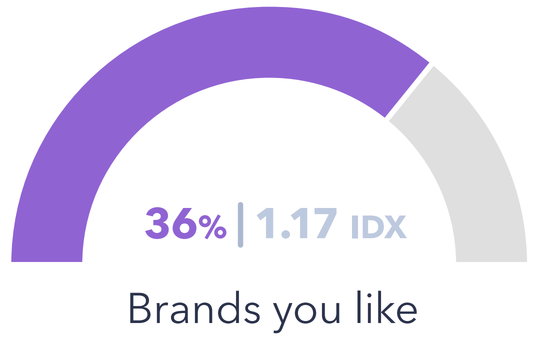
For Gen Z, people they know in real life are the most common accounts followed on social media, **but they show strong interest in accounts that align with their interests – or introduce them to new ones**. This means vloggers and bloggers make for top content, especially those related to gaming. Gen Zs are 75% more likely to follow gaming personalities online than the average internet user, with males 135% more likely to do so.

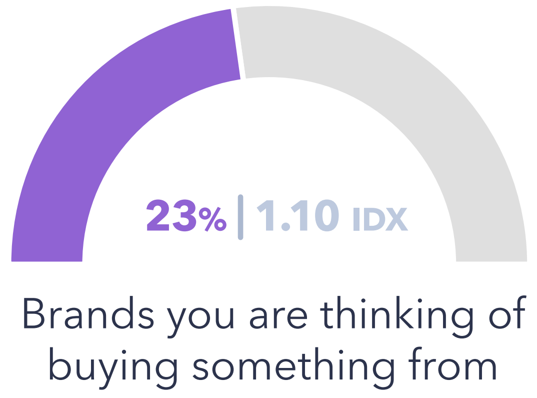
Decoding their unique social media engagement requires identifying their main interests. Females, who we noted for their interest in beauty/ cosmetics, are therefore 2.6x as likely to follow beauty bloggers on social media as the average. Their love of film then makes them 48% more likely to follow actors, while their sporting nature puts them well ahead of the average for following sports stars. Some might be concerned over their lesser enthusiasm for live sports viewing, but **the real opportunity is in engaging them through the lifestyles and personalities that sports has to offer** outside of the TV experience.

This doesn't mean branded content takes a backseat, however – over 1 in 3 follow brands they like while around 1 in 4 follow those they're considering purchasing from. But Gen Z loyalty can be won and lost quickly, as they're 22% more likely to say they've stopped following a brand online in the past month. Brands need to remember that Gen Zs are here for entertainment if they are to avoid this.

...BUT BRANDS ARE STILL IMPORTANT

% of Gen Zs who say they follow these account types on social media in the last month





EXPLORE DATA

Question: Which account types are you more likely to follow on social media?
Source: GlobalWebIndex Q2 2020
Base: 38,307 internet users aged 16-23

04

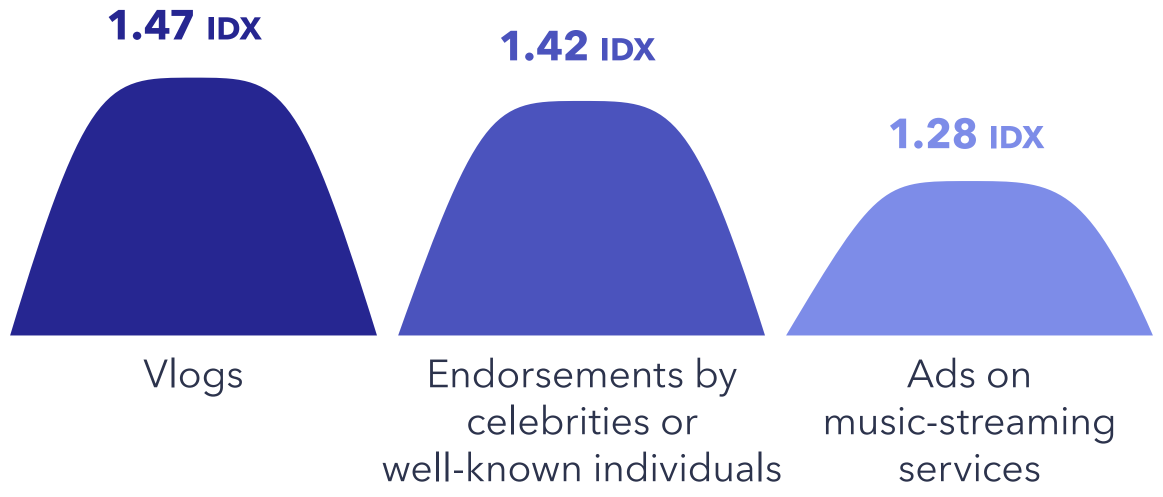
Gen Z

Brand interactions

The purchase journey

BRAND DISCOVERY

A profile of Gen Z brand discovery, indexed against the average internet user



ONLINE PURCHASE DRIVERS

A profile of Gen Z purchase drivers, indexed against the average internet user

Among most other demographics, brand discovery is still predominantly governed by search engines and TV, and it's the mix of other top channels that typically provides insight into an audience's characteristics. But for Gen Zs, social media (29%) is now on par with those channels.

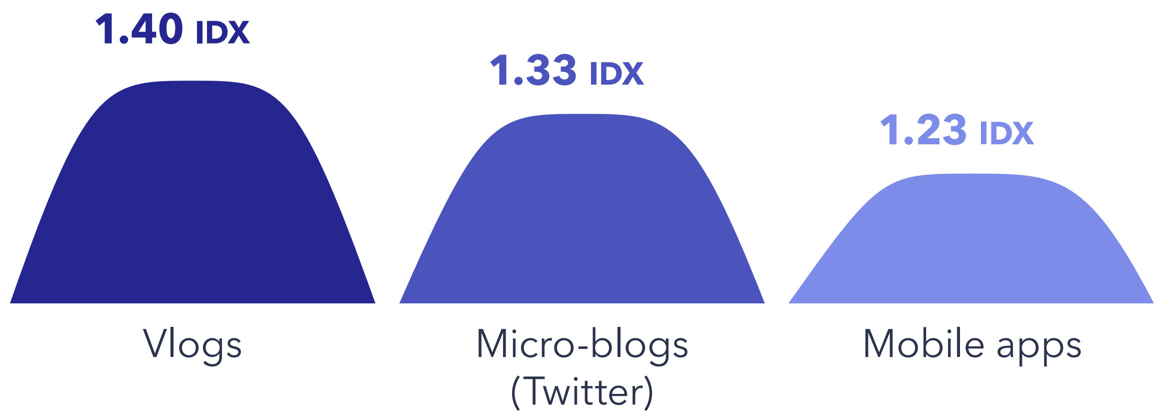
Beyond search, social and TV, Gen Zs discover products through much of the content they most associate with on social media. This means vlogs (IDX 1.47) and celebrity/influencer content (IDX 1.42) should be a priority – especially with **COVID-19** accelerating the already booming **$6.5 billion industry** of influencer marketing.

Gen Zs are likely to research products in the same way they discover them, with vlogs the stand-out method (IDX 1.40). Because 28% of Gen Zs cite an easy online checkout process as a purchase driver, brands who can seamlessly blend research and checkout – without ever directing them from the page – are putting themselves at an advantage.

More importantly, however, is cost and reward – **with major purchase drivers including free delivery (54%) and coupons/ discounts (43%).** This entails offering access to exclusive content (24%) or enhancing their online reputation (18%) through optional features like Reddit **awards** or Facebook **badges**.

ONLINE PRODUCT RESEARCH

A profile of Gen Z product research, indexed against the average internet user



BRAND ADVOCACY

A profile of Gen Z advocacy behaviors, indexed against the average internet user

EXPLORE DATA

EXPLORE DATA

Question: When shopping online, which of these features would most increase your likelihood of buying a product? | How do you typically find out about new brands and products?
Source: GlobalWebIndex Q2 2020
Base: 38,307 internet users aged 16-23

Brand positioning

BRAND QUALITIES

% of Gen Zs who say brands should be the following (sorted by over-index)

Young	1.50 IDX	38%
Trendy/cool	1.36 IDX	42%
Funny	1.26 IDX	31%
Bold	1.26 IDX	29%
Innovative	1.15 IDX	56%

BRAND ACTIONS

% of Gen Zs who say brands should do the following (sorted by over-index)

Help you improve your image/reputation	1.20 IDX	28%
Offer customized/personalized products	1.19 IDX	35%
Run customer communities/forums	1.17 IDX	21%
Support charities	1.15 IDX	33%
Make you feel valued	1.12 IDX	40%

Brands need to show they understand Gen Zs – just 15% say they feel represented in the advertising they see

While reliability is the most sought after brand quality (56% say this), they show a strong affinity for brands that come across as young, trendy or funny. **How a brand comes across goes hand-in-hand with where it comes across, so connecting with this young audience on the channels they frequent using the personalities or interests they associate themselves with is a strong first step.**

It's important to remember Gen Zs' ambition, and how a brand or product can feed into that. Just under 2 in 3 consider learning new skills as important to them and around 4 in 10 say brands should help them improve their knowledge. **They want to be the best they can be and will opt for brands that reciprocate this too.**

For brands that want to be trendy, the best way to achieve this is by demonstrating that they're listening to this vocal audience. Forum or community-based sites are key here – such as Pinterest where 24% of Gen Zs outside of China actively engaged or contributed to in the past month. **Brands can take this further by offering a platform for like-minded Gen Zs through their own customer forums.**

While they're quick to align with brands that spotlight them as individuals, their altruistic and eco-conscious views shine through also. Environmental concerns are **quickly** rising. In our coronavirus research in July, **79% Gen Zs across 18 countries told us companies behaving more sustainably is more important now following the outbreak.**

EXPLORE DATA

EXPLORE DATA

Question: Which of these things do you want brands to do? | Which of these do you want brands to be?
Source: GlobalWebIndex Q2 2020
Base: 38,307 internet users aged 16-23

05

Gen Z

Key implications

Key implications

Mental health concerns risk being a staple of Gen Z

Already concerned for themselves physically and professionally, this generation is under more pressure than ever before. Mental health concerns are becoming more commonplace and, while they may begin falling when restrictions ease, global markets rebound and job opportunities return, the long-term impact of these issues will likely be around for the foreseeable future.

They're becoming more tech-conscious

Gen Zs are more likely to be tracking their time online or say they feel they spend too long here. This isn't likely to significantly hinder device ownership in the future but, as they show less loyalty to their smartphones, lesser-used devices are coming into the fold.

They will be the face of gaming trends

Gen Zs show a greater interest in gaming than any other generation. While this is predominantly performed on smartphones, brands can expect them to be at the forefront of new devices in the future and should prepare accordingly. Begin by understanding why they play games in order to identify key segments in this generation and experiment with in-game advertising where possible – but remember their privacy concerns and attitudes to ads when doing so.

Gen Zs will determine what's "in"

Social media has become a breeding ground for short-form entertainment – where new trends are born or broken at the swipe of a thumb. Because they want funny, cool, and young brands, those who simply try to copy them will fall short of their approval. Brands need to be listening to them on community sites – or even creating their own – to promote conversation and making use of in-platform reward systems to appeal to their status seeking nature.

They're on the frontline for tackling key issues

An increasing regard for eco-consciousness and social equality has put extra pressure on companies to showcase their contribution to fighting widespread social issues. Gen Zs appreciate brands that show this and, given how quickly loyalty is won and lost with this generation, there are major repercussions for those who backstep or falsely commit to these values.

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 688,000 internet users aged 16-64 across 46 markets. 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 GlobalWebIndex 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.

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q2 2020 wave of research across 46 countries, with a global sample of 179,219 respondents.

	ALL INTERNET USERS	GEN Z		ALL INTERNET USERS	GEN Z
Argentina	1,565	355	Morocco	954	440
Australia	4,124	647	Netherlands	1,313	204
Austria	1,290	201	New Zealand	1,278	234
Belgium	1,337	223	Nigeria	1,025	414
Brazil	5,773	1,344	Philippines	3,261	1,166
Canada	4,916	739	Poland	2,085	328
China	24,582	4,758	Portugal	1,309	224
Colombia	1,296	278	Romania	1,314	221
Denmark	1,293	206	Russia	3,649	521
Egypt	1,779	523	Saudi Arabia	1,518	286
France	5,172	827	Singapore	2,806	555
Germany	5,209	742	South Africa	1,564	389
Ghana	891	437	South Korea	1,297	200
Hong Kong	1,793	329	Spain	5,130	644
India	13,829	5,218	Sweden	1,278	182
Indonesia	5,193	1,682	Switzerland	1,306	182
Ireland	1,287	207	Taiwan	2,301	402
Israel	1,276	219	Thailand	3,935	1,196
Italy	5,206	684	Turkey	2,081	598
Japan	3,343	247	UAE	1,793	146
Kenya	1,048	354	UK	10,329	1,582
Malaysia	2,849	742	U.S.A.	25,670	5,087
Mexico	4,365	1,241	Vietnam	2,607	903

Notes on methodology

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 GlobalWebIndex'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**.

INTERNET PENETRATION RATES: 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 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.

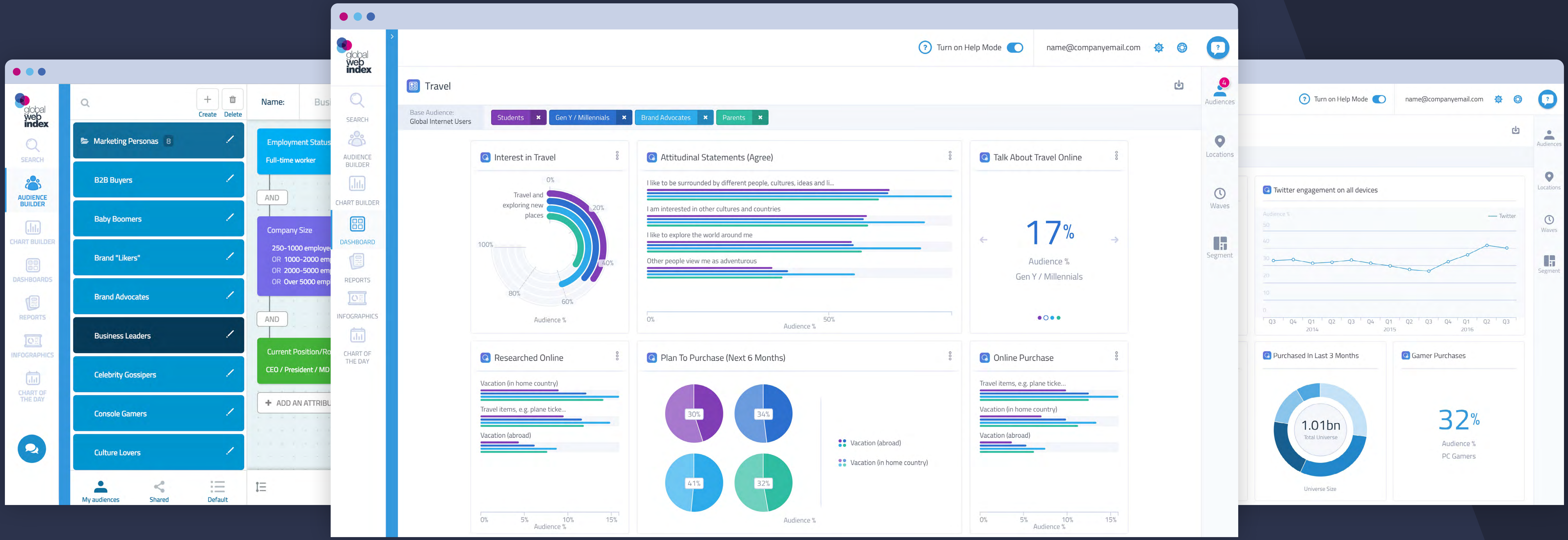
Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific 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.

INTERNET PENETRATION RATES

GlobalWebIndex's Forecasts for 2020 based on 2018 ITU data

Argentina	80%
Australia	89%
Austria	89%
Belgium	90%
Brazil	75%
Canada	94%
China	62%
Colombia	68%
Denmark	98%
Egypt	54%
France	86%
Germany	92%
Ghana	50%
Hong Kong	92%
India	45%
Indonesia	42%
Ireland	87%
Israel	88%
Italy	77%
Japan	93%
Kenya	40%
Malaysia	84%
Mexico	71%
Morocco	67%
Netherlands	95%
New Zealand	94%
Nigeria	50%
Philippines	67%
Poland	80%
Portugal	79%
Romania	76%
Russia	85%
Saudi Arabia	90%
Singapore	90%
South Africa	64%
South Korea	97%
Spain	90%
Sweden	96%
Switzerland	96%
Taiwan	90%
Thailand	59%
Turkey	76%
UAE	98%
UK	96%
U.S.A.	90%
Vietnam	70%



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