

LIFESTYLE & ATTITUDES

Generation Z (16-20s) represent **13%** of the global internet population

Regional Breakdown:
% of internet users aged 16-64 who are Generation Z

Asia Pacific	14%
Europe	9%
Latin America	15%
Middle East & Africa	19%
North America	9%

- 68% live with parents; 12% live with flat mates

- 58% live in urban locations

- 58% are currently students; 37% are studying for an undergraduate degree

Lifestyle Activities

% of Gen Z who say they do the following at least once a week

		IDX
Exercise	72%	1.01
Use public transport	52%	1.23
Eat fast food	29%	1.04
Eat out at a restaurant	29%	0.90
Drive a car	26%	0.51

Generation Z are **ambitious, fashion-conscious** individuals who **value the opinion of peers**



It is important to me to continue to develop new skills throughout life – 80%



When I need information, the first place I look is the internet – 77%



It is important for me to feel respected by my peers – 73%



I look after my appearance /image – 71%

GEN Z'S DIGITAL LIFE

Generation Z are **digital natives** – they came to age in the high-tech, constantly-connected era of **smartphones**

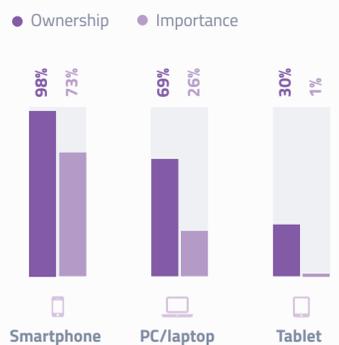
- 95% of Gen Z are getting online via mobile – rising to 98% in the Middle East & Africa

- Gen Z spend an average of 4 hours & 10 minutes per day online via mobile (68 minutes longer than the global average)

- 6 in 10 say they are constantly connected online

Device Preferences

% who say they personally own the following/ the following is their most important device



Gen Z are accustomed to **on-demand entertainment** – with **mobile** at the core of engagement

- 9 in 10 say that entertainment is an important reason for getting online

Gen Z are more likely than average to binge-watch TV shows

8 in 10 are using a mobile while watching TV; 4 in 10 are playing games on the second screen

Types of TV Watched

% who say they have watched the following in the past month via these devices

1. Watch television live as it is broadcast on a TV channel
2. Watch a TV channel's catch-up / on-demand service
3. Watch subscription services such as Netflix

	ANY DEVICE	TV	IDX	MOBILE	IDX
1.	73%	41%	0.75	24%	1.16
2.	61%	27%	0.90	24%	1.23
3.	54%	18%	0.84	27%	1.24

Gen Z are...

- Spending an average of **2 hours 57 minutes** per day on social media

- **64% MORE** likely to be visiting / using Snapchat each month

- **30% MORE** likely to be Celebrity Networkers* (72%)

- **24% MORE** likely to be Content Networkers** (61%)

Gen Z prefer to **pay for access to content** rather than to personally own it

- 76% used a music streaming service last month - 1 in 2 on mobile (33% over-index)

- 1 in 4 used Spotify last month, 35% used Netflix

- 1 in 5 paid for a music streaming service last month; 15% paid for a TV / film streaming service

Top 10 Social Platforms

% who have visited/used the following in the past month

YouTube	84%	Twitter	44%
Facebook	80%	Snapchat	36%
Instagram	63%	Pinterest	25%
WhatsApp	61%	LINE	20%
Facebook Messenger	57%	Tumblr	19%

Reasons for Using Social Networks: Top Over-Indexes

% who say the following are the main reason why they use social networks



COMMERCE & BRAND ENGAGEMENT

Online ads are as effective as TV ads for reaching Gen Zers

Top 5 Brand Discovery Channels

% who say they discover new brands/products/services through the following

		IDX
Ad seen on TV	34%	0.91
Ad seen online	34%	1.11
Search engines	32%	0.87
TV shows / films	28%	1.04
Word-of-mouth recommendations	28%	0.84

Entertainment, status and rewards

are important for gaining brand advocates

Brand Advocacy: Top Over-Indexes

% who say the following would motivate them to promote a favorite brand online

		IDX
Access to exclusive content or services	20%	1.28
Love for the brand	40%	1.18
When something enhances online reputation / status	15%	1.16
The feeling of taking part / being involved	23%	1.10
When something is relevant to my friends' interests	23%	1.09

- 51% MORE likely to want favorite brands to make them feel cool/trendy (almost 1 in 4 do)

- 32% MORE likely to want favorite brands to provide entertaining content (16% do)

- 4 in 10 would be motivated to advocate online in exchange for rewards

Gen Z are comfortable **shopping via mobile**

- 3 in 10 used a mobile payment service last month

- 7 in 10 have purchased a product online in the past month - 56% via mobile

- 3 in 4 visited an online retail site/store via mobile in the past month

Social networks & online video are key consumer touchpoints

- 1 in 4 discover brands via recommendations / comments on social; 1 in 5 via pre-roll video ads

- 1 in 2 research brands on social networks; 1 in 5 research on video sites

Gen Z are a great target for **influencer marketing**

- 25% MORE likely to say they are easily swayed by other people's opinion

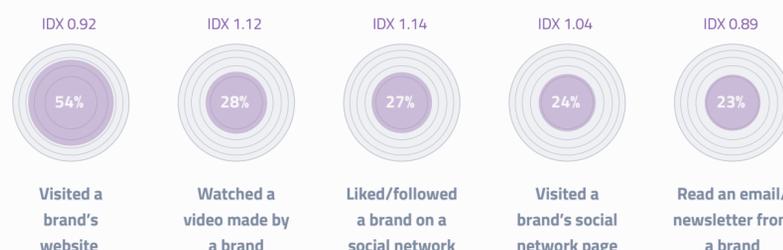
- 68% MORE likely to be following vloggers on social media (1 in 4 are)

- 55% have watched a vlog in the past month (26% over-index)

- 26% MORE likely to discover brands via endorsements from celebrities (17% do)

Top 5 Online Brand Interactions

% who say they have done the following online in the past month



Unless stated otherwise, all figures are drawn from our Q2 2017 wave of online research among 89,029 adults aged 16-64 in 40 countries. Among this cohort, there were 9,243 internet users from 'Generation Z', defined as internet users aged between 16 and 20. Note that China is excluded from percentages relating to specific/named social networks and apps.

*Celebrity Networkers are those who say they use social media to keep up with celebrities/celeb news or follow actors, comedians, singers or TV presenters on social media

**Content Networkers are those who say they use social media to find funny/entertaining content or to watch/follow sports events, or that they follow vloggers on social media.

[Click here](#) for a full definition of these Social Media Segments.