Gen Z

EXAMINING THE ATTITUDES
AND DIGITAL BEHAVIORS
OF INTERNET USERS AGED 16-20

SUMMARY REPORT Q2 2017

www.globalwebindex.net

Contents

Introduction

GWI 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 Gen Zers – those internet users who are aged 16-20.

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?

DEVICE TRENDS | what are the most important devices to this group and what are their top mobile brands?

MEDIA CONSUMPTION | Do Gen Z spend longer watching online or broadcast TV and how many are using Netflix? How widespread is second-screening?

SOCIAL NETWORKING | what are Gen Z's favorite social media platforms and who do they prefer to "follow" on these services?

COMMERCE & 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?

In this summary version, we highlight key insights and figures from our research. To read the full version of this report, start a free trial with GlobalWebIndex here.

DEFINING GEN Z

Respondents in our Core survey are asked 'How old are you?' and given an open end numeric box to input their age. In this report, Gen Z are defined as respondents who say they are aged 16, 17, 18, 19 or 20.

To re-create this audience access our Audience Builder on PRO Platform

Name: Gen Z

Age (Individual)
16
OR 17
OR 18
OR 19
OR 20

CLICK HERE

Notes on Methodology

Each year, GWI interviews over 350,000 internet users, asking a wide range of questions about their lives, lifestyles and digital behaviors.

To ensure that our research is reflective of internet users, 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.

Because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe and North America 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. 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**.

Please keep in mind that **all figures given in this report relate to the country's internet users, not to its total population.**

INTERNET PENETRATION RATES

ITU INTERNET PENETRATION METRIC 2015

Japan	93%
Netherlands	93%
United Kingdom	92%
UAE	91%
Sweden	91%
South Korea	90%
Canada	88%
Germany	88%
Belgium	85%
Hong Kong	85%
France	85%
Australia	85%
Singapore	82%
Taiwan	82%
Ireland	80%
Spain	79%
United States	75%
Russia	73%
Malaysia	71%
Saudi Arabia	70%
Argentina	69%
Portugal	69%
Poland	68%
Italy	66%
Brazil	59%
Mexico	57%
Turkey	54%
Vietnam	53%
South Africa	52%
China	50%
Philippines	41%
Thailand	39%
Egypt	36%
India	26%
Indonesia	22%

SAMPLE SIZE BY MARKET

SAMPLE SIZE

Number of respondents in each market that are Gen Zers

Argentina	87
Australia	86
Belgium	60
Brazil	256
Canada	96
China	1124
Egypt	95
France	171
Germany	152
Hong Kong	51
India	397
Indonesia	60
Ireland	84
Italy	115
Japan	114
Malaysia	103
Mexico	106
Netherlands	82
Philippines	74
Poland	68
Portugal	76
Russia	64
Saudi Arabia	65
Singapore	69
South Africa	56
South Korea	69
Spain	117
Sweden	86
Taiwan	75
Thailand	135
Turkey	109
UAE	59
UK	693
USA	685
Vietnam	132

This report draws insights from GlobalWebIndex's Q4 2016 wave of research across 35 countries, which had a global sample size of 56,767. Among this sample, there were 5,871 Gen Zers.

DEVICE TRENDS

Which devices are Gen Z most likely to own and how long are they spending online on each device?

Key Headlines

- **Smartphones are central to Gen Zers' online lives.** Ownership is near-universal and a considerable 7 in 10 say their mobile is their most important device for getting online.

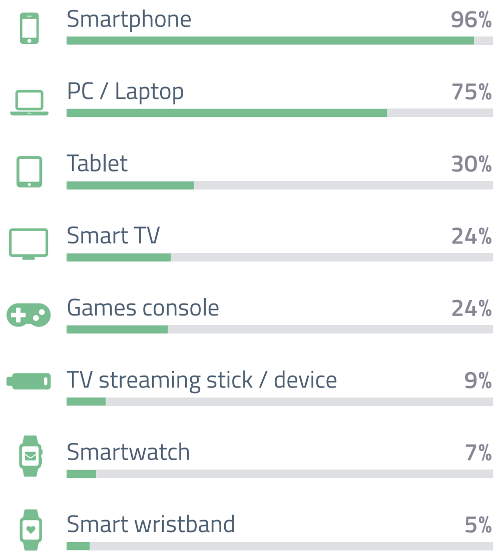
- Each day, they spend an average of 3 hours 38 minutes online on their mobiles – around 50 minutes longer than the global average. This means that **they spend longer online on their mobiles than they do on all other devices combined.**

- PCs/laptops/tablets aren't completely redundant, though - they still capture 3.5 hours of online time. Mobiles might be the primary port-of-call but, like most internet users, they are **multi-device users.**

- Samsung is currently the mobile brand of choice for Gen Z but Apple's iPhone is just 1-point behind. This is subject to some regional variation: **North American Gen Zers are over 2x as likely to have an iPhone as a Samsung, for example.**

DEVICE OWNERSHIP

% who personally own the following



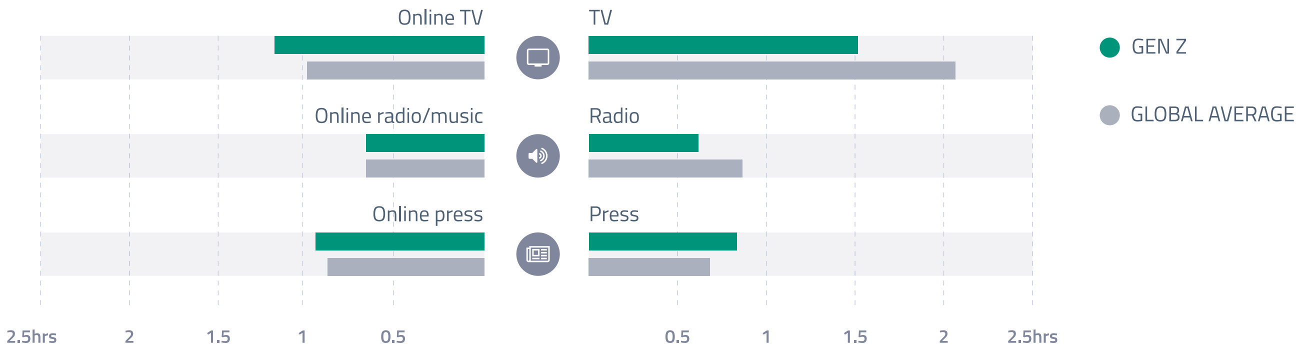
ENTERTAINMENT & MEDIA

Do Gen Z spend longer watching online or broadcast TV and how many are using Netflix? How widespread is second-screening?

Key Headlines

MEDIA CONSUMPTION BEHAVIORS

Average hours and minutes per day spent on...



- Gen Zers are enthusiastic about online TV. **Each day they spend 1 hour 11 minutes watching online TV – about 20% longer than the average internet user**. Traditional TV sets continue to capture 20 minutes more of their time, but they're considerably less enthusiastic about this than their older counterparts.

- The availability of flexible and on-demand access to TV shows and films is something that resonates strongly with these young internet users. **1 in 4 are using Netflix each month, rising to 70% among those in North America.**

- **For music-streaming, it's Spotify that comes top.** 17% are using this each month and the service is particularly popular among those in the Americas and Europe where 30-40% are using it.

- Second-screening is a completely mainstream behavior: **9 in 10 say they used another device the last time they watched TV.** Gen Z are most likely to be social networking or chatting to friends as they second-screen.

Question: Roughly how many hours do you spend on the following during a typical day?
Source: GlobalWebIndex Q4 2016 | **Base:** 5,871 Internet Users aged 16-20

PRO Platform:
Media Consumption >
Time Spent Watching Linear TV

EXPLORE THE DATA

SOCIAL MEDIA

What are Gen Z's favorite social media platforms and who do they prefer to "follow" on these services?

Key Headlines

▪ Gen Z are happy to have content from their favorite brands in their newsfeeds: **4 in 10 follow brands they like, while 1 in 4 follow brands they are thinking of buying from.** They're also big on following celebrities: we see strong over-indexes for following actors, singers and sports stars.

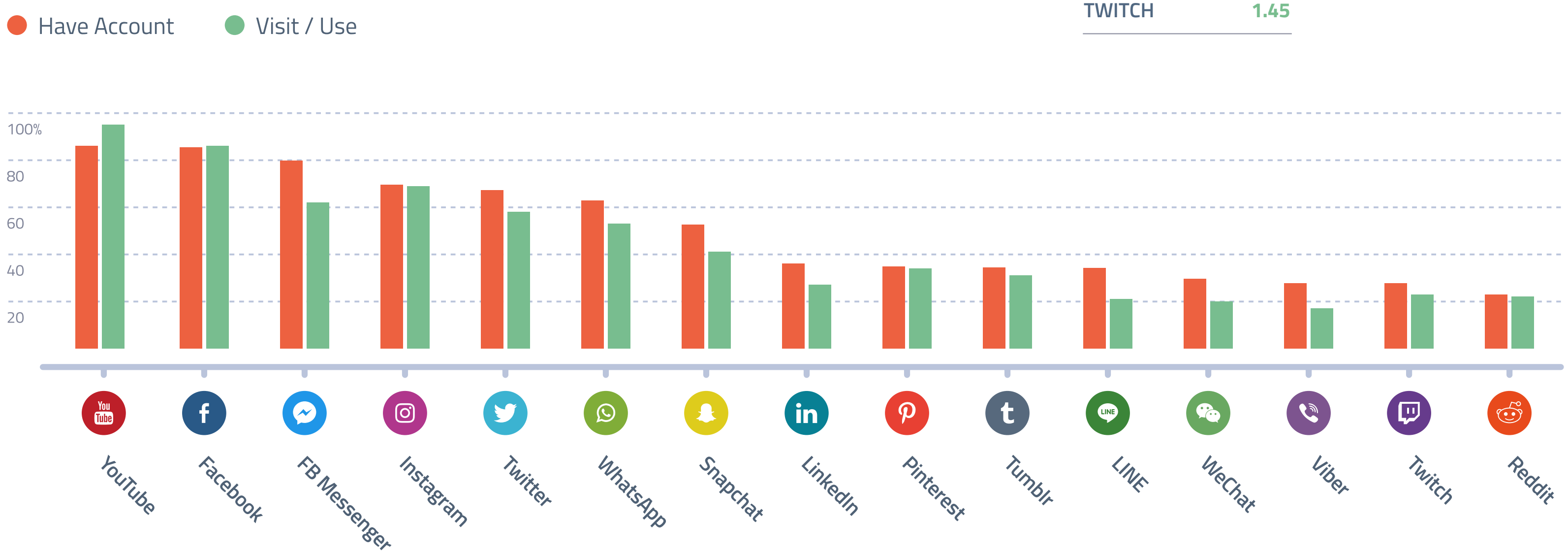
▪ **Gen Z spend an average of 2 hours 43 minutes a day on social networks and messaging services.** Their enthusiasm for mobiles is having an impact here, whereby they can dip in and out of social networks whenever they please.

▪ Outside China, **YouTube can claim to be the most popular social platform** – having almost a 10-point lead over Facebook when it comes to visitors/users. Visiting/using YouTube is virtually universal (95%), highlighting the importance of video and entertainment to this young audience.

▪ Although behind Facebook Messenger and WhatsApp, **Gen Zers are 62% more likely than average to have a Snapchat account.** Snapchat is particularly popular among those in mature, Western markets like Ireland, Canada and France.

TOP SOCIAL PLATFORMS

% who have an account or visit / use the following



MEMBERSHIP

Top 3 Over-Indexes

SNAPCHAT	1.62
TUMBLR	1.48
TWITCH	1.45

Question: On which of the following services do you have an account? // Which of the following sites/applications have you visited or used in the past month via your PC/Laptop, Mobile or Tablet?
Source: GlobalWebIndex Q4 2016 | **Base:** 4,747 Internet Users aged 16-20 from outside China.

PRO Platform: Social Media > Reach > Members

EXPLORE THE DATA

E-COMMERCE, BRAND DISCOVERY & RESEARCH

How many are shopping online each month and how do this audience discover and research new brands/products?

Key Headlines

- Traditional methods of brand promotion like search engines and TV ads still remain the most effective for reaching Gen Zers. But there's clear potential for influencer marketing: **they're 50% more likely to discover brands via vlogs, and 33% more likely to via celebrity endorsements.**

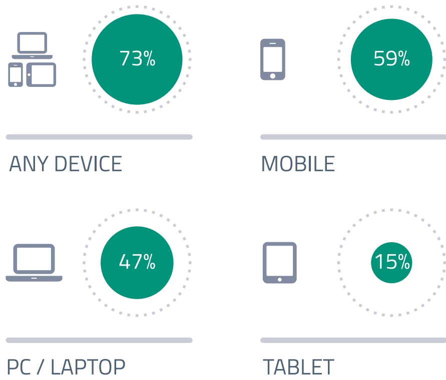
- **When looking for more information about a brand or product, they are most likely to turn to search engines.** With social networks a close second, that highlights how search behaviors are changing among these young consumers. It's not hard to see the appeal in being able to carry out search behaviors within the platforms they are so accustomed to using.

- Despite the young nature of this audience (and most still living at home with parents), there's still three-quarters who are buying online each month. **M-commerce has made a big impact here (60% are purchasing on their mobiles), while shopping on tablets is much less popular (15%).**

- **Free delivery has the biggest influence on Gen Z's purchase decisions;** with a 16-point lead over all other options, the importance of this offering cannot be overstated. Also interesting is that this group are twice as likely to value free delivery as next-day delivery.

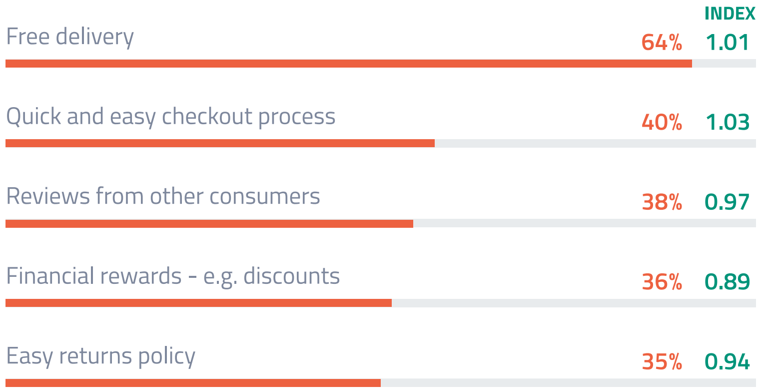
E-COMMERCE BY DEVICE

% who have purchased a product online via the following devices in the last month



TOP 5 ONLINE PURCHASE DRIVERS

% who say the following would encourage them to buy something online



Question: In the past month, which of the following things have you done on the internet via any device? // When shopping online, which of the following things would increase your likelihood of buying a product?
Source: GlobalWebIndex Q4 2016 | **Base:** 5,871 Internet Users aged 16-20

PRO Platform:
Online Activities and Behaviors > Activities via Any Device

EXPLORE THE DATA

BRAND RELATIONSHIPS & ADVOCACY

How can brands hope to appeal to Gen Zers and on which channels do this audience tend to interact with their favorite brands?

Key Headlines

- Appearance and reputation matter to this audience and it's up to brands to capitalize on this. **They're 56% more likely to think a brand should make you feel cool/trendy and it's clear that they're easily influenced by the opinions of their peers.**

- When it comes to a brand's role in these consumers' lives, above all, **they want their favorite brands to improve their knowledge or entertain them.**

- Generation Z are enthusiastic about interacting with brands on social media. **Almost a fifth have liked or followed a brand in the last month, while a similar figure have visited a brand's social network page.** The key for brands is to initiate two-way conversations and create a social presence with which Gen Zers can engage.

- 57% say they regularly inform friends and family on new products and **almost half have posted an online review in the last month.** Get a Gen Z onside and they will be willing to recruit their peers.

- High-quality products are the most likely to convince a Gen Z to become brand advocates. But it's worth recognizing that **almost 40% will engage in advocacy out of simple love for the brand.**

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

High-quality products	51%
Rewards (e.g. discounts, free gifts, etc)	42%
Love for the brand	37%
When something is relevant to my own interests	32%
When I've received great customer service	29%
The feeling of taking part / being involved	21%
When something is relevant to my friends' interests	20%
Having insider knowledge about the brand or its products	17%
Access to exclusive content or services	17%
When I have a personal relationship with a brand	16%

Question: What would most motivate you to promote your favorite brand online?
Source: GlobalWebIndex Q4 2016 | **Base:** 5,871 Internet Users aged 16-20

PRO Platform: Marketing Touchpoints > Brand Advocacy

EXPLORE THE DATA

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PRO PLATFORM

The questions and data-points featured in this report are available to explore on PRO Platform. They can be analyzed by any audience, date range or selection of countries/regions, with users able to build bespoke audiences based on our wide range of demographic, attitudinal and behavioral variables.

Each chart is accompanied by a hyperlink which will take you to the appropriate section on PRO Platform; simply click on the relevant link to start exploring the data further.

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Platform Testing
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CAMPAIGN & AUDIENCE SOLUTIONS
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Campaign Measurement
Audience Profiling
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