globalwebindex

THE YOUTH OF THE NATIONS:

Global Trends Among Gen Z

Examining the lifestyles, attitudes, and digital behaviours of Gen Z

Contents

Foreword

Amy Moussavi
Head of Consumer Insights
Snap Inc.

As researchers, marketers, and consumers, we've been talking a lot about millennials for the last decade: we've heard that millennials are disrupting the retail industry, taking longer to buy homes, and **killing cereal**. And throughout the past decade, we've been simultaneously making predictions and projections about the next generation: Gen Z. Finally, Gen Z is at an age where they can influence and make meaningful purchases, an age where they can tell us about their generation.

To celebrate the year that Gen Z will become the largest generation around the globe (yes, surpassing our beloved millennials), Snap Inc. partnered with GlobalWebIndex to understand Gen Z at a deeper, global level. It was important for us to do some myth-busting around this generation that we've made so many assumptions about over the years: how do they feel about online privacy? Do they have a negative outlook on the future of the environment? Are they really the "activist generation," and how does this differ by region or compared to older generations?

Jason Mander
Chief Research Officer
GlobalWebIndex

Gen Z are sometimes characterised as the "millennial+" generation – behaving much like their slightly older predecessors while being even more mobile-centric and more digitally oriented. But once we move beyond these widely accepted generalisations, how do today's youngest adults really think and behave? What are the differences which make them unique, even from millennials? What are the key trends and issues that all of us need to know about beyond the realms of digital and social? And, if we take a truly global perspective, how do Gen Z differ across the world's regions?

It's these themes that GlobalWebIndex set out to explore in this report, drawing on our Core research among a sample of just under 79,000 16-22 year-olds across 45 markets. To help us place the spotlight on this generation – from their personal interests, attitudes and lifestyle profiles to their need-to-know media consumption, purchasing and device behaviours – we could think of no better partner than Snap Inc. We're proud to present the results from our joint work in this report.

Introduction

GlobalWebIndex's mission has always been to understand the attitudes, behaviours and motivations which define an audience. With the growing commercial importance and size of Gen Z continuing to bring them onto the radar of more and more marketers and brands, GlobalWebIndex and Snap have partnered to shed light on this young generation – uncovering who they are, what drives and interests them, and what they're doing in the digital space.

This report explores:

Who are Gen Z? – a demographic/lifestyle profile of this cohort, including: income, education, household living situation, relationship status, and lifestyle attitudes.

What Drives Gen Z? – understanding how this audience's core values, attitudes, priorities, and interests are distinct from other generations.

Constantly Connected – diving into this audience's usage of technology and their reliance on connectivity as the first generation to truly only know life in the internet age.

Rising Purchase Power – mapping out the purchase journey of this audience, understanding where they discover and research brands or products, what drives their purchases, and what motivates them to advocate a brand.

Gen Z becomes the biggest generation in 2019
Here's a few key insights

1 - The need for acceptance and belonging to a community are key characteristics for Gen Z. Around 2 in 5 say they are easily influenced by other people's opinions — they're 17% more likely than the global average to say this. Additionally, 73% say it's important to feel respected by their peers.

2 - Gen Z are the first generation to be considered true digital natives, born into a high-tech world with the internet in easy reach. This is reflected in their attitudes toward technology. Around 64% of Gen Z say they are constantly connected online and 57% feel more insecure without their mobile phone than their wallet.

3 - For Gen Zs, their smartphones are absolutely central to their lives. This group spent an average of 4 hours and 15 minutes per day on their mobile by the end of 2018 — the longest of all generations. In particular, mobiles have a noticeable lead over PCs/laptops for social-related activities like uploading/sharing photos.

4 - Streaming media provides the type of entertainment content that Gen Zs have grown accustomed to — tailored to their tastes, schedules, and attention spans. Watching TV and video content is the second-most important reason for using the internet amongst Gen Zs, and their appetite for paid streaming services like music and video is notably strong too.

5 - Gen Zs are taking a more holistic view of self-care. Over time, we've seen purchase patterns for Gen Z change — not only are they purchasing less indulgent food products, but they are spending more on beauty and skincare products, indicating that they're investing in their health and self-care in a more holistic way.

The Youth of the Nations: Global Trends Amongst Gen Z

Who are Generation Z?

Fact or Fiction? Busting Common Gen Z Stereotypes

For many years, millennials were centre stage for brands and marketers. But for some time now, there's been a new group in town – Gen Z.

There are various definitions for this cohort, but generally Gen Z includes all of those born after 1997. One thing's for sure: they're the consumers on everyone's lips nowadays. In fact, according to **Bloomberg[1]**, this audience is expected to overtake millennials this year — accounting for 32% of the global population. As their buying power increases and as they come of age, this audience will no doubt be a key target for brands.

Alongside being marketing's new golden child, this generation has been subject to many stereotypes and misconceptions. Let's take a look at a couple of common questions and see how they hold up when examined under an analytical lens.

[1] In this report, we are focusing on adult Gen Zs, aged 16-22

## Are they more diverse than other generations?

Gen Z are the most ethnically diverse generation in the U.S. **More Gen Zs identify as Hispanic (22%) or Black/African-American (15%) compared to other generations.** For example, this drops to 20% and 14% respectively amongst millennials. But amongst Gen Xers (aged 36-54) just 18% identify as Hispanic and 11% as Black/African-American. Baby boomers (aged 55-64) are the least diverse generation — just 10% identify as Hispanic and 11% as Black/African-American.

Compared to Gen Xers and baby boomers, our data shows that U.S. Gen Zs are significantly more interested in other cultures and countries, reflecting their openness and curiosity toward others.

Gen Z are likely to have been surrounded by more diverse groups of people, and equality is something that's a core value for this group. All of this will probably have an impact on their future career and employer choices. As Gen Zs kick off their professional careers, this generation will expect a more diverse and inclusive workplace.

ETHNICITY

% of generations in the U.S. who describe their ethnicity as:

● Black/African-American   ● Hispanic   ● Other*

Gen Z: 15, 22, 63
Millennials: 14, 20, 66
Gen X: 11, 18, 71
Baby Boomers: 11, 10, 79
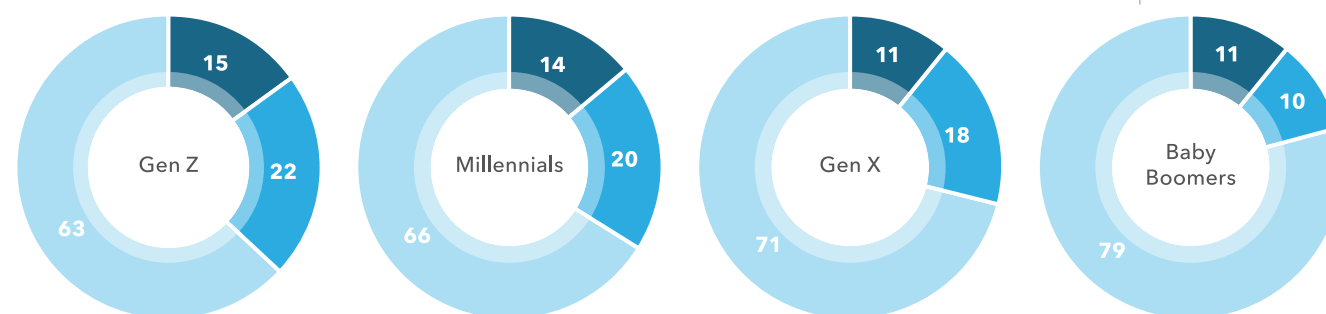
*Other Ethnicities (including White Caucasian, Asian American, Native American)

Question: How would you describe your ethnicity?
Source: GlobalWebIndex Q1 2018-Q4 2018 **Base:** 178,546 U.S. internet users aged 16-64

Fact or Fiction?
Busting Common
Gen Z Stereotypes

Are they abstaining from alcohol?

This is a half truth. It's not that they're abstaining from alcohol altogether, but they're much more conscious of their alcohol consumption compared to other generations. **For example, 36% of Gen Zs aged 18-22 (outside of the U.S.) say they never drink alcohol – they're 61% more likely than the global average of drinking age adults to say this.** We see similar patterns for 21-22s in the U.S. with 24% saying they never drink alcohol.

To put this into context, just 15% of Gen Zs aged 18-22 say they drink alcohol at least once a week compared to 28% of millennials and 36% of baby boomers. In addition, Gen Z also under-index for **all** types of monthly alcohol consumption, including beer, vodka, whiskey, wine and rum. This audience is interested in keeping healthy – over half say they go running/ jogging once a week or more and over a third have purchased a health-related food product in the past month.

36% of Gen Z aged
18-22 (excl. U.S.) say
they never drink alcohol

Question: On average, how often would you say you do the following things? **Source:** GlobalWebIndex Q1 2018-Q4 2018 **Base:** 46,030 internet users aged 18-22 (excl. U.S.)

Note: Drinking alcohol is not asked in Egypt, Saudi Arabia or UAE

globalwebindex

globalwebindex

# Fact or Fiction? Busting Common Gen Z Stereotypes

Are they more entrepreneurial than other generations?

They're entrepreneurial, but not necessarily more than millennials. When looking at their self-perceptions, we can see that 74% of Gen Z say they want to always strive to achieve more in life (73% for millennials). A further 72% of both Gen Z and millennials say they like to challenge and push themselves to be the best they can be in life. Additionally, 65% of both cohorts say they're very career oriented. These audiences are both clearly ambitious and willing to challenge themselves.

Their business mindset is also highlighted in their interests too. 29% of Gen Z say they're interested in entrepreneurship (31% for millennials). In general, both generations show greater enthusiasm for entrepreneurship compared to older generations.

INTEREST IN ENTREPRENEURSHIP

% who say they are interested in the following:
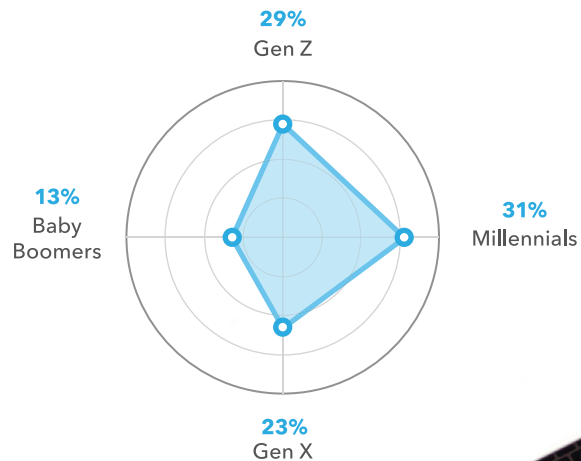
29%
Gen Z

31%
Millennials

23%
Gen X

13%
Baby Boomers

Fact or Fiction? Busting Common Gen Z Stereotypes

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 actually (only slightly) less likely to say that they are sharing their account with at least one other person. Similarly with Spotify, there are no significant 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. Close to 60% of Gen Z Netflixers in APAC say they are the only person to use their Netflix account compared to just 17% of Gen Zs in Latin America.

Have they given up on cable?

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. We can see that time spent watching linear TV is decreasing slightly over time while online TV is increasing. Perhaps surprisingly, they aren't watching more online TV than the typical internet user per day though, averaging 1 hour 18 minutes per day in 2019.

Fact or Fiction? Busting Common Stereotypes on their Global Outlook

Do they have a negative outlook on the future of the environment/economy?

It's debatable. When we look at their attitudes toward the environment, we see that Gen Zs are typically in line with the global average for agreeing that they feel positive about the environment. But when we flip it on its head, our data reveals that Gen Zs are most likely to **disagree** that they feel positive about the future of the environment (27%) compared to all other generations. It seems that this group are the most disillusioned when it comes to environmental matters. Disagreement rates vary greatly by region, jumping to 47% in Europe and 46% in North America compared to just 20% in APAC. This is because news about environmental crises have been amplified over the past few years in these regions. It makes sense why Gen Zs feel this way – they're going to face the full impact of environmental issues much more than generations before them.

Our data shows that 3 in 4 Gen Zs agree that it's important to stay in touch with what's going on in the world. It's clear that Gen Z have a sharp focus on global, widespread issues that will affect their generation and indeed generations to come. They're a very astute group and are in tune with what is going on around them. It's safe to say that this group have their eyes wide open to the issues going on in the world and are keen to make a difference.

GEN Z ATTITUDES TOWARD THE ENVIRONMENT
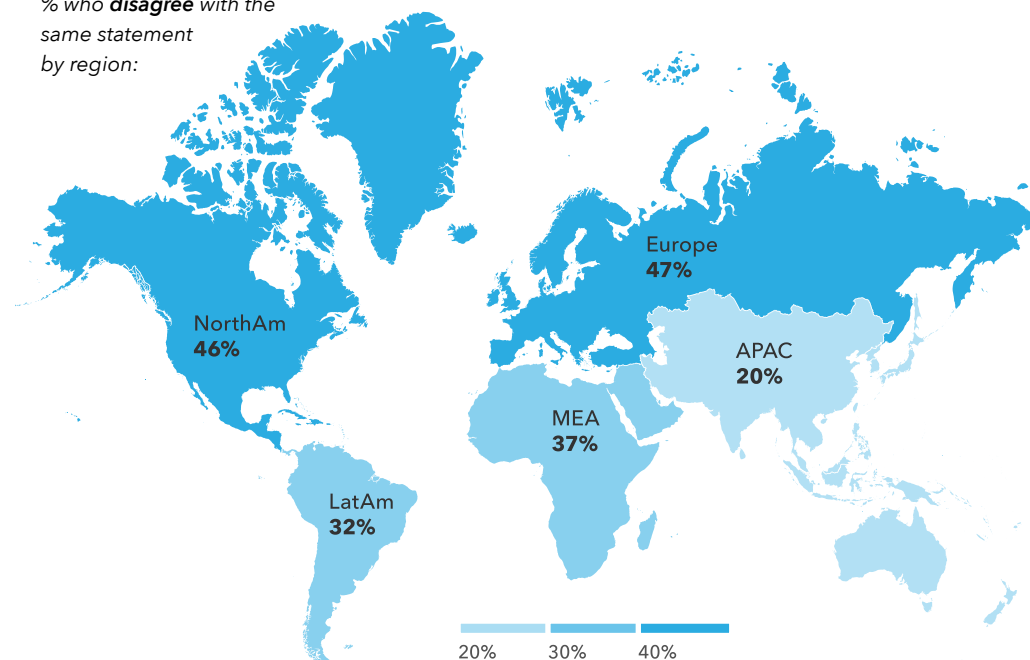*% who **disagree** with the following statement:*

I FEEL POSITIVE ABOUT THE FUTURE OF THE ENVIRONMENT

27%
Gen Z

22%
Millennials

*% who **disagree** with the same statement by region:*

Europe
47%

APAC
20%

NorthAm
46%

MEA
37%

LatAm
32%

20%   30%   40%

globalwebindex

Fact or Fiction? Busting Common Stereotypes on their Global Outlook

Are they the "activist generation"?

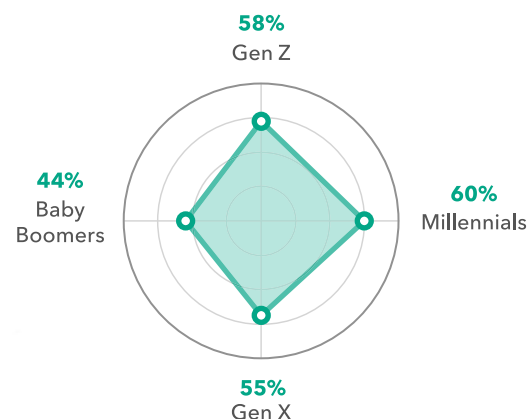**Yes – but this is also shared with millennials.**
Gen Z are doing more than ever to change the game in areas like sustainability, the environment, animal cruelty, amongst many others.

We only need to look at 16 year old Swedish Activist, Greta Thunberg, who is making great efforts to get governments around the world to take more action on climate change. Many more Gen Zs are following suit. On March 15, 2019, more than a **million students** around the world followed Thunberg and walked out of their Friday classes to protest inaction on climate change.

Millennials can't be overlooked, though. This group have also driven the sustainability movement with their lifestyle and behavioural changes. From our data, we can see that Gen Z and millennials are the generations most likely to say they would pay more for sustainable/eco-friendly products. For both generations, it's important that their purchases reflect their beliefs and values. Figures for Gen Z will only grow in line with their increasing disposable income. These two generations combined are a force to be reckoned with when it comes to social, environmental and political matters.

WILLINGNESS TO PAY MORE FOR ECO-FRIENDLY PRODUCTS

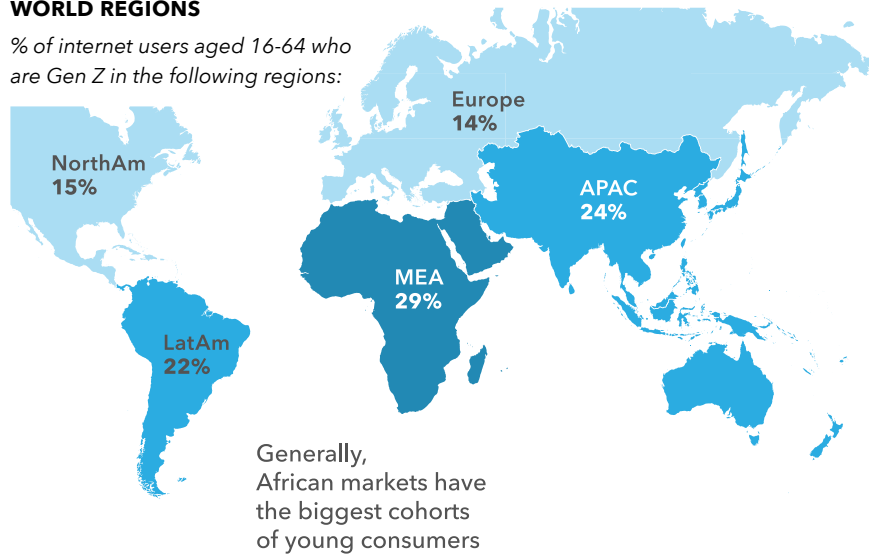*% who say they would pay more for sustainable products:*

58%
Gen Z

44%
Baby Boomers

60%
Millennials

55%
Gen X

globalwebindex

Profiling Gen Zs

WORLD REGIONS

% of internet users aged 16-64 who are Gen Z in the following regions:

Europe **14%**

APAC **24%**

NorthAm **15%**

MEA **29%**

LatAm **22%**

Generally, African markets have the biggest cohorts of young consumers

LIVING CONTEXT

60% Urban

24% Suburban

17% Rural
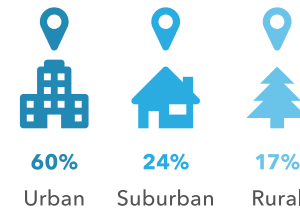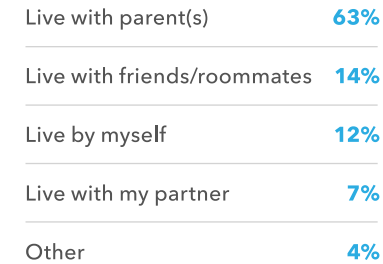
Globally, most Gen Z live in urban areas but in Australia and the U.S. the majority live in the suburbs

LIVING ARRANGEMENT

Live with parent(s)	**63%**
Live with friends/roommates	**14%**
Live by myself	**12%**
Live with my partner	**7%**
Other	**4%**

86% of Gen Z in Hong Kong live with their parents (highest of all our tracked markets)

WORK STATUS

- Student
- Full-time worker
- Part-time worker
- Unemployed
- Self-employed[1]
- Other
- Stay-at-home parent

52 · 18 · 12 · 8 · 7 · 4 · 1
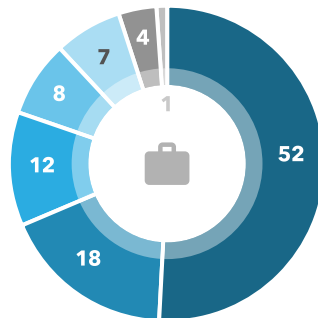
61% of Gen Z students are studying toward an undergraduate degree

[1]Including freelancers

RELATIONSHIP STATUS

- Single
- In a relationship
- Married
- Other

79 · 16 · 4 · 2
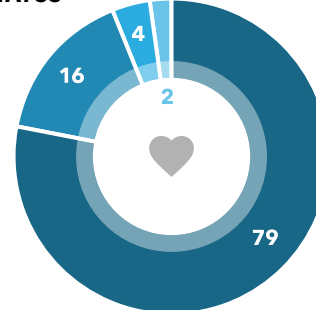
44% of Gen Z have used an online dating app in the past month

INCOME

- Bottom 25%
- Mid 50%
- Top 25%
- Top 10%
- Prefer not to say

32 · 36 · 11 · 5 · 22
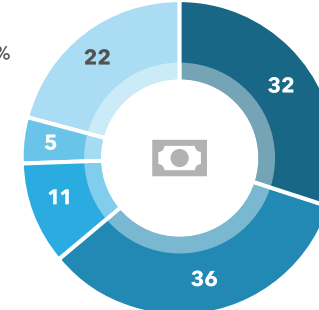
56% of Gen Z say they have some kind of cash savings

globalwebindex

The Youth of the Nations: Global Trends Amongst Gen Z

What Drives Gen Z?

Gen Z Self-Perceptions

In terms of their attitudes and self-perceptions, it tends to be statements relating to ambition that score the highest figures. 79% say it's important for them to develop new skills throughout life and 77% attach value to seizing opportunities when they arise.

Importantly, 74% think we should all strive for equality. This links us back to the previous point about diversity and reinforces the idea that equality is a key value for this group.

Gen Zs in Latin America place more importance on equality (83%) compared to Gen Zs in Europe (69%)

TOP 5 SELF-PERCEPTIONS
% who agree with the following statements:

01.   **79%**
It is important to **develop new skills** throughout life

02.   **77%**
You should **seize opportunities** when they arise

03.   **77%**
It is important to **be well informed** about things

04.   **74%**
I think we should all **strive for equality**

05.   **74%**
Family is the most important thing in my life

Question: To what extent do you agree/disagree with the statements below on your perception of yourself? **Source:** GlobalWebIndex Q1 2018-Q4 2018 **Base:** 60,040 internet users aged 16-22

Gen Z Self-Perceptions

Their strongest over-indexes highlight Gen Zs' most unique characteristics. Around 2 in 5 say they are easily influenced by other people's opinions – they're 17% more likely than the global average to say this. Additionally, 73% say it's important to feel respected by their peers. **The need for social currency and a sense of community are absolutely crucial for Gen Zs.**

They don't just have a need to feel respected by peers, Gen Zs like to make an impact. They want to stand out in the crowd, to take risks and to pursue a life of challenge, novelty and change. They're not a group that will accept the status quo and will likely seek to grow themselves through new experiences.

Looking further at the attitudinal segmentation, we can see that some of what we already mentioned comes to light – as well as some clear differences between Gen Z and millennials. Gen Z are 25% more likely to think of themselves as spontaneous than millennials, again reflecting their need to take risks. Gen Z are also 41% more likely to be economical than millennials, meaning they're much more price-conscious. This is largely because of their age and current life stage, but it's something that brands should keep in mind.

Gen Z say they...

64%
Would like to pursue a **life of challenge,** novelty & change

48%
Are **risk takers**

47%
Like to keep up with the **latest fashions**

45%
Like to **stand out** in a crowd

 41%
Are **easily swayed** by other people's opinion

globalwebindex

Personal Interests

Entertainment-related interests come out on top for Gen Z. This "always-on" audience is spending a considerable amount of time consuming entertainment and their need for entertainment is also reflected in how they use social apps, which we'll come to later.

Music, films/cinema and gaming all feature in their top 5 interests. They're actually 36% more likely than the global average and 22% more likely than millennials to be interested in gaming. Games like *FIFA and Fortnite* have encouraged uptake of gaming amongst this audience; 23% of Gen Z have played *FIFA* and 17% of Gen Z have played Fortnite in the last 12 months – the highest across all generations. There are some differences when we break it down by region. For example, an interest in music is highest in Latin America (82%) compared to APAC (65%) and the Middle East and Africa (60%). This interest in music in Latin America is fuelled by countries like Mexico, Argentina and Colombia.

This group is also more interested than millennials in experiential activities such as urban/modern art and adventure sports. They're around 25% less likely than millennials to be interested in gambling.

While both generations are behind the curve for interest in local issues, we've already seen that Gen Z and millennials are more concerned with global, large-scale issues. For example, around 3 in 4 of both generations say it's important to stay in touch with what is going on in the world; they're very much

the global generations. Their focus on global issues is likely down to the media they're consuming. This group spends a significant amount of time on social apps, and around 40% of Gen Z use them to stay up-to-date with news. This likely exposes this group to more globally relevant news stories.

• TOP 5 INTERESTS •

01.	02.	03.	04.	05.
Music	**Films/Cinema**	**Food & drink**	**Gaming**	**Technology**
69%	61%	58%	54%	53%

● Gen Z ● Millennials

More likely to be interested in...
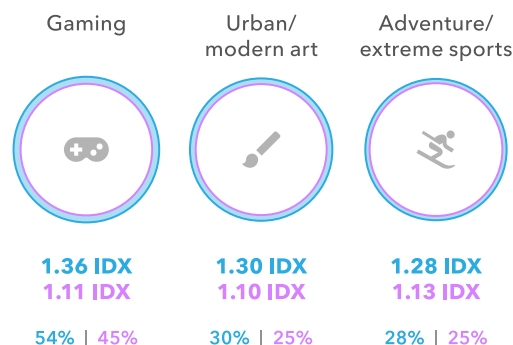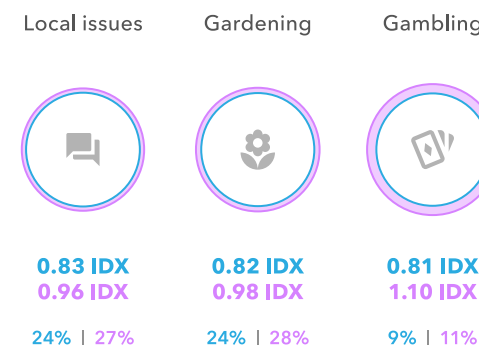
Gaming	Urban/ modern art	Adventure/ extreme sports
1.36 IDX	**1.30 IDX**	**1.28 IDX**
1.11 IDX	**1.10 IDX**	**1.13 IDX**
54% | 45%	30% | 25%	28% | 25%

Less likely to be interested in...

Local issues	Gardening	Gambling
0.83 IDX	**0.82 IDX**	**0.81 IDX**
0.96 IDX	**0.98 IDX**	**1.10 IDX**
24% | 27%	24% | 28%	9% | 11%

globalwebindex

Attitudes Towards Technology

GEN Z AND MILLENNIALS' ATTITUDES TOWARD TECHNOLOGY

% who agree with the following statements:

	Gen Z	Millennials
There is too much choice online	67%	69%
I am constantly connected online	64%	66%
I am concerned about the internet eroding my personal privacy	61%	62%
It's critical for me to be able to be contactable at all times in terms of my private life	59%	63%
I feel more insecure without my mobile phone than my wallet	57%	58%
Having the latest technological products is very important to me	50%	55%

● Gen Z
● Millennials

As widely reported, Gen Z are true digital natives – born into a high-tech, high-networked world with an abundance of information at their fingertips. They have never known a time without the internet, and probably can't even imagine life before the smartphone.

From our data, we can see that this group is highly engaged with technology. **64% say they are constantly connected online and 57% feel more insecure without their mobile phone than their wallet.** Millennials also feel similarly, showing how pervasive technology is in the lives of both generations.

There is a noticeable internal conflict for millennials when it comes to technology. **While they say they're constantly connected online** and that they feel insecure without their mobile, they're much more likely than Gen Zs to say that they don't understand new technology (23% more likely) or that technology complicates their lives (12% more likely). This might be partly because millennials grew up during a period of rapid technological, economic and societal change. They're the generation that pioneered social media, but they also struggle between their desire to be constantly connected and their concerns over the impact technology has on their daily lives. On the other hand, many Gen Zs have owned smartphones as young as elementary or middle school.

It's also interesting to highlight that both Gen Z (67%) and millennials (69%) feel there is too much choice online. We've seen a considerable increase in this among Gen Z in particular, jumping up from 59% in 2015. The issue of choice fatigue is something that is becoming even more apparent recently, especially when it comes to subscription services. With Disney and Apple launching their streaming services later this year, there's a danger of subscription fatigue becoming very real.
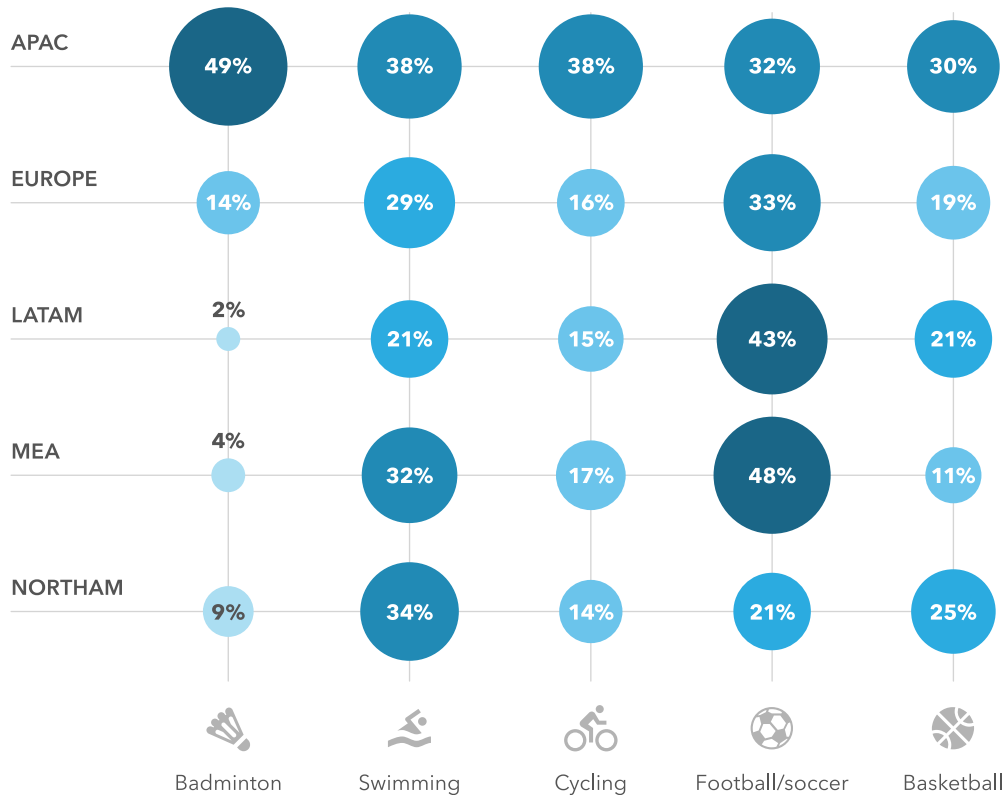
We can also see that privacy concerns are neck-and-neck for both of these groups and are also key concerns for Gen X'ers and baby boomers too. This shows that despite the generational gap, concerns about the internet eroding their personal privacy are consistent across ages. We'll dig deeper into online privacy behaviours in section III of this report.

globalwebindex

Sports

TOP 5 SPORTS PLAYED BY GEN Z

% who play/take part in the following sports:

	Badminton	Swimming	Cycling	Football/soccer	Basketball
APAC	49%	38%	38%	32%	30%
EUROPE	14%	29%	16%	33%	19%
LATAM	2%	21%	15%	43%	21%
MEA	4%	32%	17%	48%	11%
NORTHAM	9%	34%	14%	21%	25%

Fitness and exercise (49%) and playing sports (45%) are strong interests for Gen Z. While their love of the former is equal to that of millennials, the latter is higher amongst Gen Z than amongst any older generation. We can see Gen Z's interest is reflected in their exercise habits – over half of Gen Z say they go running/jogging at least once a week or more.

They're also enthusiastic about taking part in various sports, over-indexing for most of the sports that we track. However, there are notable differences when we break it down by region. Badminton is more popular in APAC compared to other regions by quite a long shot. **49% of Gen Z in APAC play/take part in badminton compared to just 2% in Latin America.** Cricket is also much more prominent in APAC amongst Gen Zs (20%). Football/soccer is the most popular sport to play for this group in Europe (33%), Latin America (43%) and Middle East and Africa (48%). And in North America, swimming comes out on top (34%).
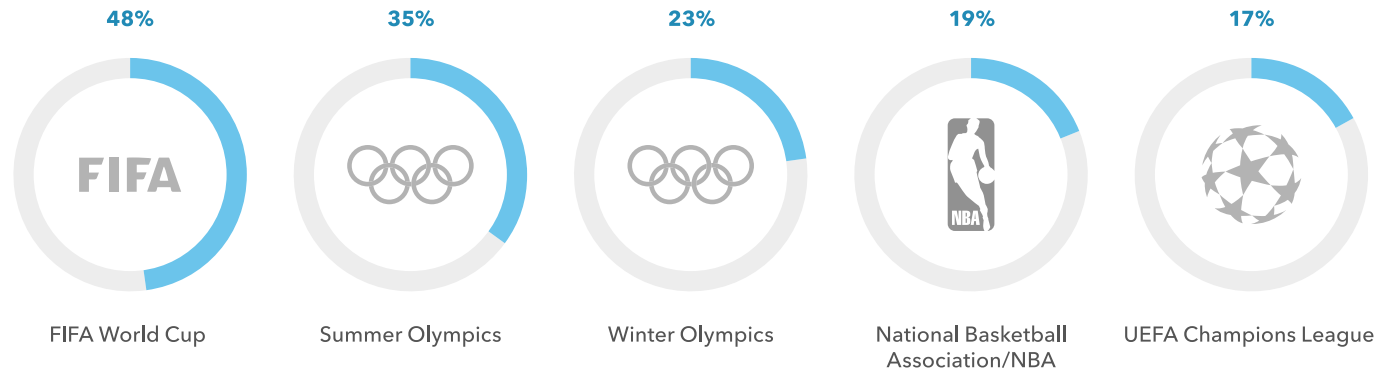
Gen Zs in Middle East and Africa are nearly 3x more likely to regularly play netball

globalwebindex

Sports

TOP 5 SPORTING COMPETITIONS WATCHED BY GEN Z

% who watch the following events/leagues online or on TV:

48%	35%	23%	19%	17%
FIFA	(Olympic rings)	(Olympic rings)	NBA	(Champions League ball)
FIFA World Cup	Summer Olympics	Winter Olympics	National Basketball Association/NBA	UEFA Champions League

When it comes to the sports they watch online or on TV, they're slightly less likely to be watching many of the sports/competitions that we track. But we still see notable levels of engagement for a number of sporting leagues. 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 National Basketball Association and the UEFA Champions League are the most popular annual events.

6 of the 7 top over-indexing sports watched online or on TV are all cricket leagues. The two biggest being the Indian Premier League and the ICC World Cup. These figures are massively inflated by Gen Zs in India. When we exclude India from the analysis, the top 6 over-indexing sports watched are football/soccer tournaments.

And it's not just traditional sports that this group is engaging with. Esports, or professional competitive gaming, has crept into the mainstream over the past year and younger consumers have been a key driving force behind this uptake. **Around 1 in 4 Gen Z have watched an esports tournament in the past month, which is 1.3x the global average.** With over half of this audience saying they're interested in gaming, it's not difficult to see why this group are a key audience for esports brands and marketers. APAC, and China in particular, are the biggest players in esports and have been pivotal in its development.

The Youth of the Nations: Global Trends Amongst Gen Z

Constantly Connected

Device Ownership and Usage

WHAT DEVICES DO GEN Z OWN?

% who say they own the following devices:

Smartphone	PC/Laptop	Smart TV	Tablet	Games console	Feature phone	TV streaming stick/device	Smartwatch	e-Reader	Smart wristband	Virtual Reality headset/device
97%	69%	30%	29%	22%	12%	11%	10%	9%	8%	4%
1.02 IDX	0.95 IDX	0.81 IDX	0.76 IDX	1.02 IDX	1.10 IDX	0.79 IDX	0.91 IDX	0.77 IDX	0.86 IDX	0.95 IDX
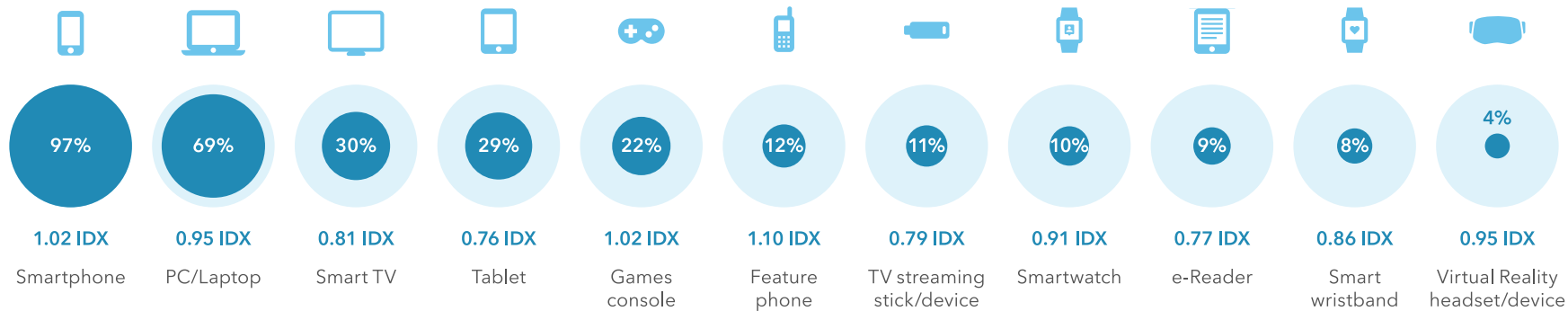
For Gen Zs, their smartphone is absolutely central to their lives. **This group were spending an average of 4 hours and 15 minutes per day on their mobiles by the end of 2018.**

This is partly down to ubiquitious smartphone ownership, with 97% of Gen Z owning a smartphone. Ownership of mobile is way ahead of all other devices we track. It also makes sense that smartphones are the top devices used to access the internet for this generation.

Though mobiles clearly dominate overall, laptops and PCs still have a presence. We can see that ownership of devices like laptops/PC, tablets and games consoles vary greatly by region. For example, laptop ownership is actually quite high amongst Gen Zs in Europe (85%) and North America (80%); they're the only two regions to over-index for owning a laptop. These regions place more emphasis on laptops because they typically got online through these first, and these devices tend to be more ingrained there in general.

97% of Gen Z own a smartphone

Device Ownership and Usage

Europe is also way ahead for ownership of tablets. 43% of Gen Zs in Europe own a tablet compared to just 20% in the Middle East and Africa. Gen Zs in North America also post the strongest figures for games console ownership (53%) compared to APAC (16%). Games consoles were banned in China up until 2015 so this is likely a significant contributing factor.

When we compare device ownership to millennials, we can see that millennials are more likely to own smart devices like smartwatches, smart wristbands and virtual reality devices. Disposable income levels likely come into play here.

Our data shows just how important mobiles are for Gen Zs, and how device importance has changed over the years.

We can see that mobile importance for this group has increased from 47% in 2015 to 78% in 2018. Both laptop and desktop PCs have been in a steady decline during these years.

Gen Z say their mobile is the most important device to get online – more so than other generations. This generation generally grew up with smartphones within easy reach, even more so than millennials. They spend the most time on their mobiles compared to other generations, and around 30 minutes longer per day in 2018 than millennials. The majority of Gen Zs have owned their mobile for less than 1 year; however, just over 1 in 4 plan on upgrading their mobile within the next 6 months.

It's important to note that multi-device usage is now the norm, and mobile usage is not necessarily at the expense of laptops/PCs. Essentially, mobile usage is simply adding another screen that can be used on-the-go.

Marketers and brands must therefore adopt an omni-approach strategy that is optimised for both mobile and laptops in order they reach Gen Zs across the world. They expect a seamless transition between devices so brands need to get this right.

MOBILE IS THE MOST IMPORTANT DEVICE FOR GEN Z

% who say mobiles are the most important devices for accessing the internet:
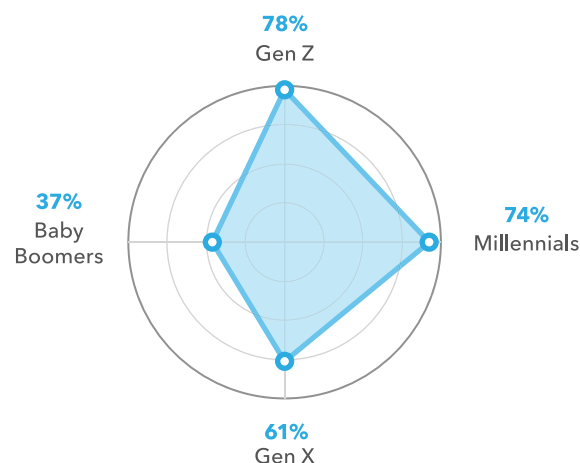
78%
Gen Z

74%
Millennials

37%
Baby Boomers

61%
Gen X

globalwebindex

Device Ownership and Usage

DEVICE IMPORTANCE OVER TIME FOR GEN Z

% of Gen Zs who say the following devices are most important over time:

Mobile

78%
74%
60%
47%

2015   2016   2017   2018

Laptop

30%
23%
15%
12%

2015   2016   2017   2018

Desktop PC

21%
15%
10%
9%

2015   2016   2017   2018

Gen Zs were spending an extra 1 hour and 13 minutes on their mobiles per day in 2018 compared to 2015

globalwebindex

Online Activities

ONLINE ACTIVITIES BY DEVICE

% who did the following in the last month via:

Activity	Mobile	PC/Laptop	Mobile-Only* Activities
Visited/used a social network	95%	72%	23%
Used a chat or instant messaging service/app	92%	38%	54%
Watched a video clip or visited a video-sharing site	91%	62%	28%
Visited/used a search engine	90%	76%	19%
Visited an online retail site or store such as Amazon	79%	56%	31%
Used a map or directions service/app	77%	22%	57%
Searched for a product or service you want to buy	73%	43%	37%
Visited a news website/app/service	71%	42%	37%
Uploaded/shared a photo	65%	26%	47%
Checked the weather online	60%	24%	47%

*Mobile-only refers to activities done exclusively on the mobile

Question: In the past month, which of the following things have you done via mobile // PC/laptop // mobile-only? **Source:** GlobalWebIndex Q1 2018-Q4 2018 **Base:** 60,040 internet users aged 16-22

globalwebindex

Online Activities

Given the considerable importance attached to smartphones, it's to be expected that these devices are the go-to for all of the online behaviours we track. **In particular, mobiles have a noticeable lead over PCs/laptops for social-related activities like uploading/sharing photos.** Using instant messaging apps and uploading videos also come towards the top of the list when it comes to looking at mobile-only activities (54% and 39% respectively).

We can also see that 77% of Gen Z say they have used their mobile for a map or directions, this figure slides down to just 22% for PCs/laptops (the biggest difference in all of our tracked activities). In fact, using mobile for a map or directions is the top mobile-only activity (57%). Other key mobile-only activities include checking the weather online and uploading/sharing photos. This is very much down to the on-the-go nature and accessibility of mobiles.

Nevertheless, we can see a significant number of Gen Zs carry out commerce-related activities on PCs/laptops. For example, 56% have visited an online retail store, 43% have searched for a product they want to buy and 33% have purchased a product online. Overall, it's clear that there's a greater uptake in mobile-only behaviours like chatting and getting

directions, which are natural behaviours that people do when they're on-the-move. Whereas, activities like using a search engine and online retail involve a deeper need for more information that the mobile device hasn't been able to fully overtake just yet. Mobile is still more useful for lighter-touch online activity.

Regional differences may shine some light here; over double the respondents in North America (49%) 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 45%.

When we look at the top over-indexes for mobile online activities, we can see the importance of video and entertainment content here. **Gen Zs are 36% more likely than average to watch a vlog and 26% more likely than average to use a music-streaming service via their mobile.** They're also 26% more likely to use voice search or voice commands, and as a decent proportion (28%) are planning to upgrade their mobile within the next 6 months this will likely fuel the uptake of mobile voice tech.

Online Privacy Behaviours

As smartphones become ever more important to Gen Zs and as we're in a post-GDPR landscape, it's clear they're becoming more tech-savvy and more privacy-aware. **60% say they're concerned about how their personal data is being used by companies and 53% say they prefer to be anonymous when online.** As a result, this group are taking action and using tools that control or improve their online experiences.

Gen Z are 12% more likely than average to be blocking ads. An overabundance of ads online is the biggest frustration (49%), with close to a majority also saying they block ads because they are annoying/irrelevant (48%). These reasons are quite consistent with older generations.

The proliferation of irrelevant online advertising has been key here and unless these issues can be addressed, and Gen Z can be convinced of the merits of the value exchange between free content and advertising exposure, we're sure to see ad-blocking rates increase in the future.

3 in 5 have used a private browsing window and just over half have used an ad-blocker to stop ads being displayed in the past month

ONLINE PRIVACY ACTIONS
% who have done the following in the last month:

60% 1.26 IDX	**52%** 1.12 IDX	**50%** 1.00 IDX	**37%** 1.26 IDX
Used a private browsing window	Used an ad-blocker	Deleted cookies	Used a VPN
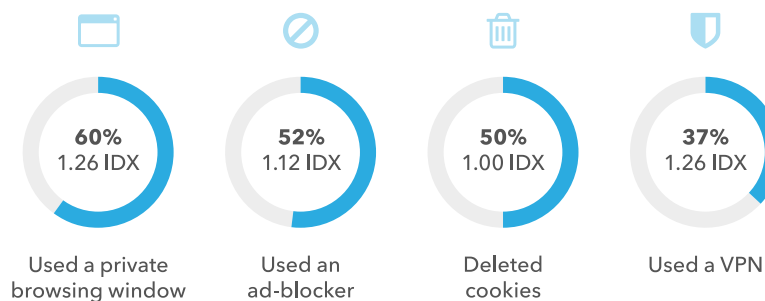
TOP AD-BLOCKING MOTIVATIONS
% of ad-blocker users who say they block ads for the following reasons:

There are too many ads on the internet	**49%**
Too many ads are annoying or irrelevant	**48%**
Ads are too intrusive	**45%**
Ads take up too much screen space	**40%**
Ads sometimes contain viruses or bugs	**40%**

globalwebindex

Media Consumption

Looking at how media consumption has changed for Gen Z over time further emphasises our understanding of this generation as mobile-first. Between 2015 and 2018, the average amount of time these young consumers were spending on their mobile phones per day went up by more than a third. Average time spent on PC/laptop/tablet devices has declined slightly, though not dramatically enough to mirror the growth of mobile time spent. This further reinforces the idea of the multi-screen experience for Gen Zs – with mobile enhancing, rather than replacing, the laptop/PC screen. A similar pattern is evident in how traditional TV vs. streaming TV consumption is changing – with streaming on the rise as linear TV gradually declines.

The availability of flexible and on-demand access to TV shows and films is something that resonates strongly with Gen Z. Close to 3 in 5 Gen Zs are watching subscription services like Netflix at least once a week.

79% of Gen Zs in APAC watch live TV on a TV channel at least once a week compared to 62% in North America

Mobile is quickly catching up with television as Gen Z's most popular device to watch any type of TV, including live, on-demand and subscription services. Already, mobile is almost on par with TV for devices used to watch a channel's catch up/on-demand service. **Perhaps most interestingly, mobile (43%) is ahead of TV (27%) for devices used to watch subscription services such as Netflix.**

This reiterates this audience's love for on-the-go, easily accessible entertainment via their most important device. This group has grown up with Netflix and Amazon Prime Video, amongst others, at their fingertips, and expect to have content that's available to watch at any time.

Like millennials, the type of entertainment content that Gen Z has grown accustomed to is tailored to their tastes, schedules, and attention spans – essentially the antithesis that the spontaneity of live TV offers.

DAILY TIME SPENT ON MEDIA
Average time spent per day in hh:mm on the following media channels:

📱 Mobile   💻 PC/Laptop/Tablet

▶ Streaming TV   🖥 Linear TV
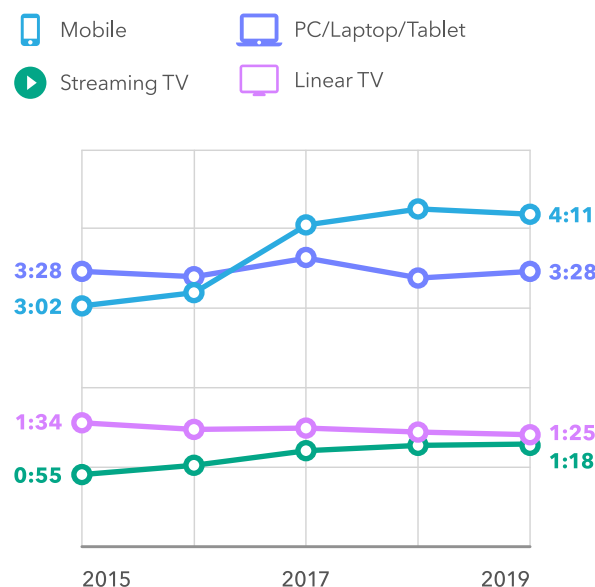
FREQUENCY OF WATCHING TV
% who say they do the following at least once a week:

Watch live television on a TV channel	**76%**
Watch subscription services such as Netflix	**59%**
Watch a TV channel's catch-up/on-demand service	**57%**
Watch shows that you have recorded from TV	**50%**

globalwebindex

Media Consumption

DIGITAL BEHAVIOUR SEGMENTATION

*% of Gen Zs, millennials, Gen Xs, and baby boomers
who qualify as the following types of digital media
users based on their reported motivators:*

● Gen Z   ● Millennials   ● Gen X   ● Baby Boomers

97 98 97 94	91 90 79 63	85 86 76 63 %
Shoppers	Viewers	Creators
84 83 69 50	63 66 57 43	62 64 56 43 %
Listeners	Commenters	Followers
60 66 58 40	49 56 45 33	46 47 40 31 %
Workers	Reviewers	Sharers
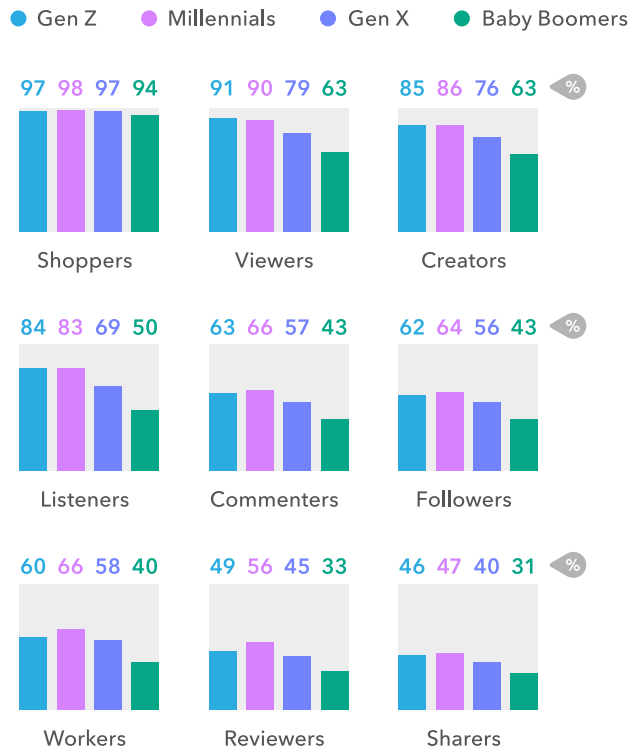
Underpinning this change in TV vs. streaming behaviour amongst Gen Zs are their core motivations for going online. **Watching TV and video content is the second-most important reason for using the internet amongst Gen Zs, making them 20% more likely than general internet users to hold this view.**

REASONS FOR USING THE INTERNET

% of Gen Zs and millennials who report the following as important reasons why they use the internet:

● Gen Z   ● Millennials   ● Index for Gen Z

Finding information 67% 65% 1.00	Filling up spare time/ general browsing 55% 47% 1.17
Watching videos, TV shows or movies 65% 58% 1.20	Researching how to do things 54% 52% 1.04
Staying in touch with friends/family 63% 59% 1.07	Finding new ideas or inspiration 50% 49% 1.10
Accessing/listening to music 61% 49% 1.29	Gaming 46% 35% 1.42
Education/study-related purposes 60% 45% 1.39	Researching products /brands 45% 50% 0.91
Keeping up-to-date with news/events 58% 59% 0.97	Meeting new people/ making connections 38% 35% 1.20

Gen Zs over-index on other entertainment-focused motivators, as well, including using the internet for listening to music (1.29 Index), filling up spare time (1.17 Index), and gaming (1.42 Index). Correspondingly, they under-index in some of the more serious internet usage motivators - such as health research (0.86 Index) and business-related research (0.78 Index).

globalwebindex

App Usage

APP TYPES USED

% of Gen Zs who report using the following types of apps in the past month:

92% | 1.04	**91%** | 1.05	**67%** | 1.25	**65%** | 1.02	**65%** | 1.01
Social networks	Chat/ messaging	Music	Shopping	Maps

62% | 1.29	**49%** | 1.29	**40%** | 1.02	**38%** | 0.87	**32%** | 1.07
Games	Entertainment	Travel	News	Taxi or ride-sharing

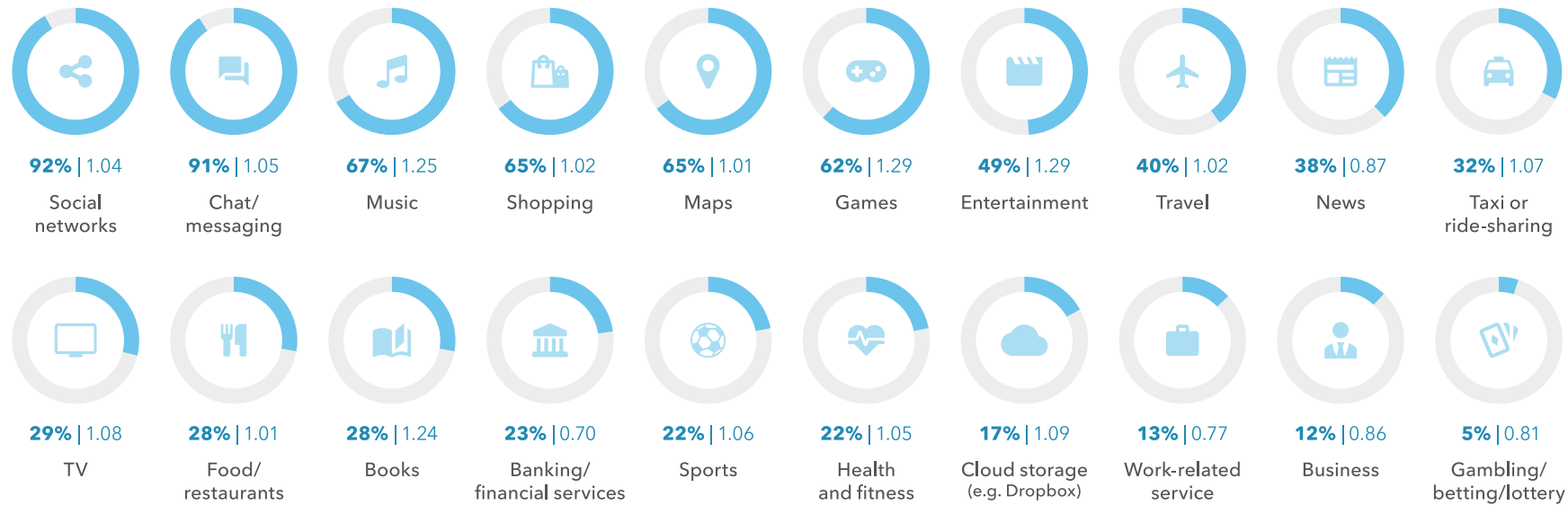|				
29% | 1.08	**28%** | 1.01	**28%** | 1.24	**23%** | 0.70	**22%** | 1.06
TV	Food/ restaurants	Books	Banking/ financial services	Sports

22% | 1.05	**17%** | 1.09	**13%** | 0.77	**12%** | 0.86	**5%** | 0.81
Health and fitness	Cloud storage (e.g. Dropbox)	Work-related service	Business	Gambling/ betting/lottery

Social networking and messaging apps represent the most heavily used app categories amongst Gen Zs. Where this audience over-indexes most dramatically compared to other internet users, however, is in their usage of entertainment-based apps, such as music (1.25 Index), gaming (1.29 Index) and other entertainment (1.29 Index) app categories. In contrast, app categories that fill more serious information or productivity needs, such as news (0.87 Index), finance (0.70 Index), and work-related services (0.77 Index), are less likely to be utilised by Gen Z.

The extent to which Gen Z have embraced apps over the last number of years is evident in the growth patterns of the top few app categories, as well. **The dominance of social apps and their near-constant presence in the lives of these young consumers has become an undeniable observation** – by 2018, 92% of Gen Zs reported using social apps in the past month, an 11% increase in only the last two years. Music, shopping, travel, and map-based apps have similarly seen significant growth amongst this cohort – indicating that, for Gen Z, apps have come to cater to nearly all of their lifestyle needs.

globalwebindex

The Youth of the Nations: Global Trends Amongst Gen Z
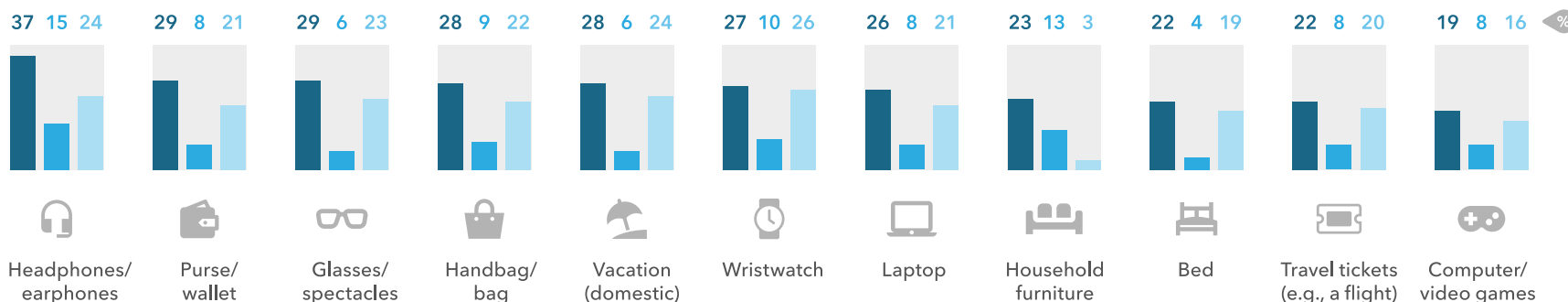
Rising Purchase Power

Changing Purchase Patterns

MAJOR PURCHASE CATEGORIES

% of Gen Zs who report having purchased in the past 3-6 months or plan to purchase the following types of products:

● Purchased in the last 3-6 months   ● Purchased online   ● Planning to purchase

37 15 24	29 8 21	29 6 23	28 9 22	28 6 24	27 10 26	26 8 21	23 13 3	22 4 19	22 8 20	19 8 16 %

Headphones/earphones · Purse/wallet · Glasses/spectacles · Handbag/bag · Vacation (domestic) · Wristwatch · Laptop · Household furniture · Bed · Travel tickets (e.g., a flight) · Computer/video games

Investigating the types of major purchases that Gen Zs have made in recent months reveals that, unlike experience-focused millennials, **Gen Zs are more willing to spend their money on entertainment, tech, and fashion purchases.** The number one big-ticket item for Gen Zs is headphones; 37% have purchased this item in the past 3-6 months (1.3 Index) and 24% are planning to make a purchase in the future (1.4 Index). Gen Zs are also 1.2x as likely as other internet users to have recently purchased a laptop, and 1.3x as likely to have purchased computer games.

In the realm of fashion, Gen Zs are 1.2x as likely to have purchased a wristwatch and 1.2x as likely to have purchased a purse/wallet in recent months. A drive toward fashion is emphasised amongst young consumers in Asia Pacific and the Middle East, and least pronounced in North America. 30% of APAC Gen Zs and 29% of MEA Gen Zs report having purchased a handbag/bag in recent months, with only 20% of their North American counterparts having done so. Similarly, twice as many Gen Zs in both APAC (28%) and MEA (29%) are planning to buy a wristwatch vs. those in North America (14%).

When it comes to travel and experiences, Gen Zs are not prioritizing these big purchases the way we have seen with millennials, with 28% of Gen Zs reporting having recently purchased a domestic vacation, compared with 35% of millennials.

We see Gen Z as true "digital natives", but when it comes to making major purchases online, they are right on par with millennials for most items. For the majority of big-ticket items, less than 10% of Gen Zs are reporting that they purchase these things online – the exceptions being headphones and household furniture. Millennials even have a slight edge on Gen Zs here, as this older group are more likely to have purchased travel tickets (11%) and a handbag/bag (10%) online.

globalwebindex

Changing Purchase Patterns

An emerging differentiator between Gen Z and older consumer groups is their movement toward a more health-conscious lifestyle. In the realm of purchasing, this manifests in Gen Zs under-indexing in their recent purchasing of indulgent foods – such as soft drinks, cookies, and frozen foods. Longitudinal data reveals that this has been a developing trend amongst young consumers - between 2015 and 2018, the rate purchasing snack foods on a monthly basis has declined from 54% to 50%. Similarly, purchasing of chocolate went down from 49% to 45% in this same time period.

And this change in food purchase patterns is unlikely to be related to Gen Zs living at (or moving back) to their parental home. Quite the opposite. In 2016, 72% of this cohort reported that they lived with their parents. By 2019, this figure had gone down to 61%, indicating that Gen Zs are generally following a natural course of independence as they get older, and that they are making healthier choices about it than we might expect.

For Gen Zs, health is not limited to curtailing indulgent food options, however – **this younger cohort seem to be taking a more holistic view of self-care**, as reflected in their over-indexed purchasing of beauty and skin products.

PURCHASE CATEGORIES
% of Gen Zs who report having purchased the following types of products in the past month:

UNDER-INDEXING: INDULGENT FOODS

42% 0.95 IDX	**42%** 0.93 IDX	**31%** 0.88 IDX
Soft drinks	Cookies	Frozen food/ ready meals

OVER-INDEXING: BEAUTY PRODUCTS

26% 1.09 IDX	**22%** 1.11 IDX	**20%** 1.12 IDX
Beauty products	Skincare products	Exfoliating products

Gen Zs are taking a more holistic view on health and self-care

Question: In the last month, which of these have you or your household purchased? **Source:** GlobalWebIndex Q1 2018-Q4 2018 **Base:** 60,040 internet users aged 16-22

globalwebindex

Digital Content

In the realm of entertainment purchase categories, the most drastic changes can be seen amongst digital vs. traditional sources of entertainment. Between 2015 and 2018, purchasing of films/boxsets dropped by 21% amongst this cohort. Similarly, purchasing of music albums dropped by around 11% in the same time frame.
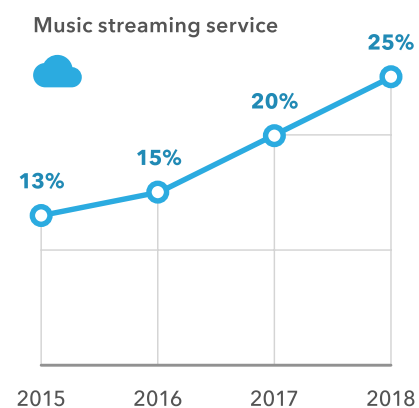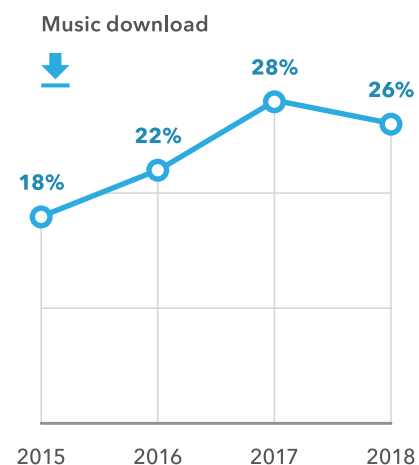
Where analog entertainment has declined, digital entertainment has flourished – especially in the area of streaming services. Looking at Gen Z's digital purchasing behaviours generally, we can see that they typically over-index in their willingness to pay for music, gaming, and education-related digital content. While Gen Zs slightly under-index in their purchasing of movie or TV-streaming services – often considered the realm of binge-watching millennials – this is still a growing category. Since 2015, the number of Gen Zs paying for movie/TV streaming services has increased by 25%. More significantly, however, is this audience's consumption of paid-for music streaming services – since 2015, the number of Gen Zs who have paid for a music streaming service has nearly doubled.

The streaming landscape for young consumers is especially developed in North America – nearly 4 in 10 Gen Zs in this region report having paid for a music streaming service recently. Less than 3 in 10 young internet users in Europe and Asia Pacific are paying for this type of digital content, with figures in Latin America and the Middle East and Africa even lower. Similarly, North American Gen Zs are also the most likely to pay for movie or TV streaming services; 31% report having done so in the last month. Unlike with music streaming, however, Latin American Gen Zs are much more interested in movie/TV streaming services; 30% of these young consumers report paying for such a service, nearly on par with their North American counterparts and ahead of all other regions.

Gen Z's consumption of paid-for music streaming services has nearly doubled since 2015

TRENDS IN DIGITAL MUSIC PURCHASES

% of Gen Zs who report having purchased the following types of digital products over time:

Music download

18%   22%   28%   26%

2015   2016   2017   2018

Music streaming service

13%   15%   20%   25%

2015   2016   2017   2018

Please note: All trended data has accounted for year-on-year ageing amongst the samples

Question: In the last month, which of these have you paid for? **Source:** GlobalWebIndex 2015-2018 (averages of all research waves conducted in each year) **Base:** 11,808 internet users aged 16-19 (2015), 20,064 internet users aged 16-20 (2016), 48,281 internet users aged 16-21 (2017), 78,589 internet users aged 16-22 (2018)

globalwebindex

Digital Content

DIGITAL CONTENT PURCHASED

% of Gen Zs who report having purchased the following types of digital products in the past month:

26% | 1.20
Music download

25% | 1.18
Music streaming
service

21% | 1.27
Mobile game

20% | 0.88
Movie or TV
streaming service

19% | 1.09
Mobile app

16% | 0.99
Movie or TV
download

14% | 1.24
Study programs/
learning materials

13% | 1.03
e-Book

11% | 1.11
In-app
purchases

9% | 1.08
Software
package

8% | 0.87
News service

8% | 1.10
Digital gifts

7% | 0.94
Premium
web service

7% | 0.95
A subscription to
an online version
of a magazine

5% | 1.00
Dating service

globalwebindex

The Youth of the Nations: Global Trends Amongst Gen Z

Notes on Methodology

Notes on Methodology

All figures in this report are drawn from **GlobalWebIndex's online research amongst 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 behaviours. **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.

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

Unless otherwise stated, this report primarily draws insights from GlobalWebIndex's Q1 2018-Q4 2018 waves of research across 45 countries, with a global sample of 474,573 respondents.

	GEN Z (16-22)	TOTAL
Argentina	1,111	6,256
Australia	1,266	10,938
Austria	713	5,180
Belgium	661	5,122
Brazil	1,872	9,370
Canada	1,035	9,142
China	12,256	61,554
Colombia	797	4,097
Denmark	529	3,885
Egypt	1,820	7,047
France	1,721	15,039
Germany	1,226	13,776
Ghana	1,224	4,000
Hong Kong	995	7,263
India	6,008	19,880
Indonesia	2,277	7,093
Ireland	721	5,000
Italy	1,551	13,701
Japan	683	7,126
Kenya	1,235	4,000
Malaysia	1,196	6,222
Mexico	2,360	10,515
Morocco	1,101	4,000

	GEN Z (16-22)	TOTAL
Netherlands	679	5,167
New Zealand	749	5,128
Nigeria	1,400	4,000
Philippines	1,893	6,327
Poland	1,045	7,306
Portugal	800	5,155
Romania	198	1,307
Russia	1,010	9,073
Saudi Arabia	907	5,721
Singapore	1,637	10,313
South Africa	1,123	6,133
South Korea	608	5,107
Spain	1,320	13,675
Sweden	775	5,155
Switzerland	721	5,073
Taiwan	871	7,200
Thailand	1,479	6,125
Turkey	1,610	6,395
UAE	721	7,088
UK	4,316	33,589
USA	8,511	72,936
Vietnam	1,858	6,394

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**.

Notes on Methodology: 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.

GLOBALWEBINDEX VERSUS ITU FIGURES

As GlobalWebIndex's Core Research is conducted amongst 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

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%