Generation Z

GWI's report on the latest trends among internet users aged 16-24

GWI.

In this report

Click the dots to navigate

Methodology

All figures in this report are drawn from GWI's online research among internet users aged 16-64. 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.

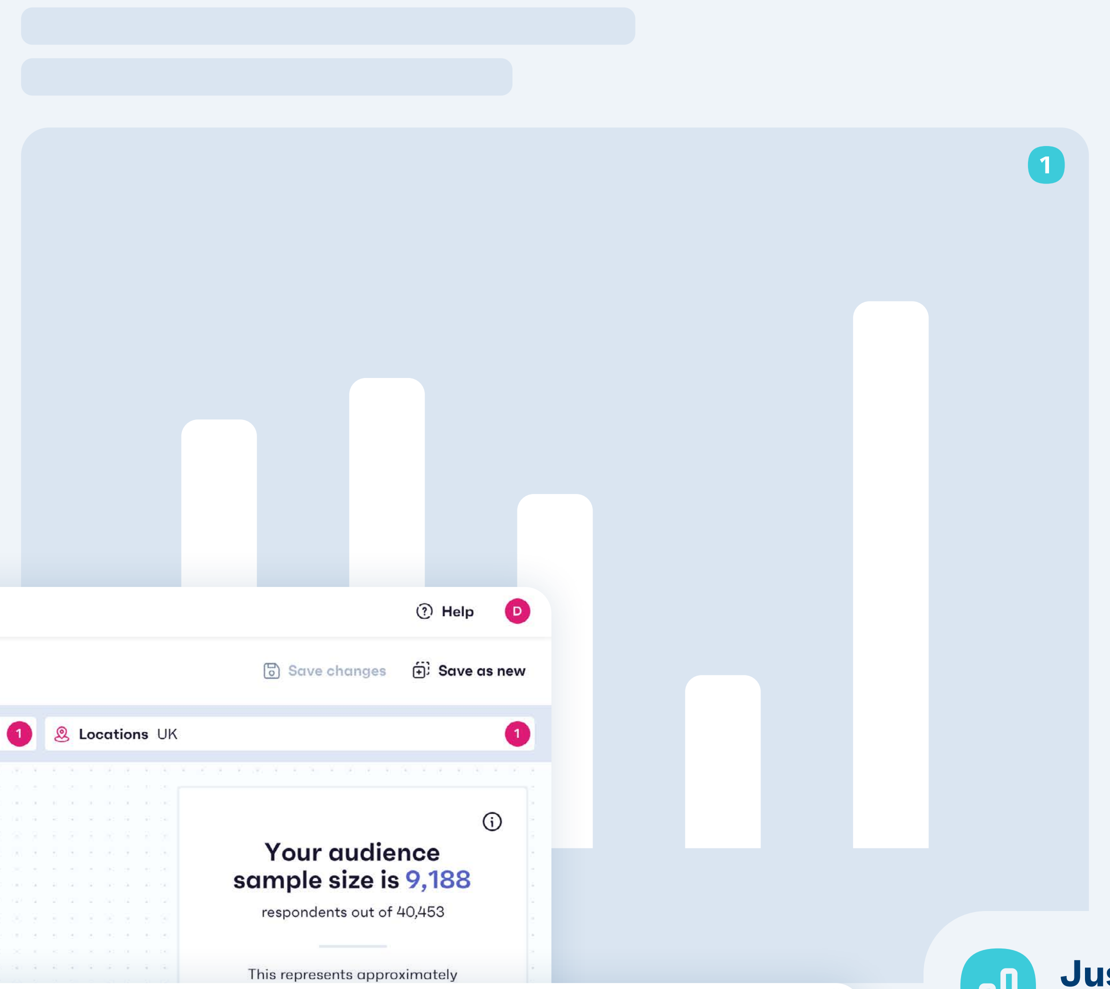
Each year, GWI interviews over 700,000 internet users aged 16-64 via an online questionnaire for our Core dataset. A proportion of respondents complete a shorter version of this survey via mobile, hence the sample sizes presented in the charts throughout this report may differ as some will include all respondents and others will include only respondents who completed GWI's Core survey via PC/ laptop/tablet.

When reading this report, please note that we focus on data from our ongoing global quarterly research, but also refer to our monthly Zeitgeist studies across 9 markets, and our GWI USA dataset, which surveys over 20,000 internet users in the US aged 16+ each quarter.

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 Click the dots is 20% below the global average.

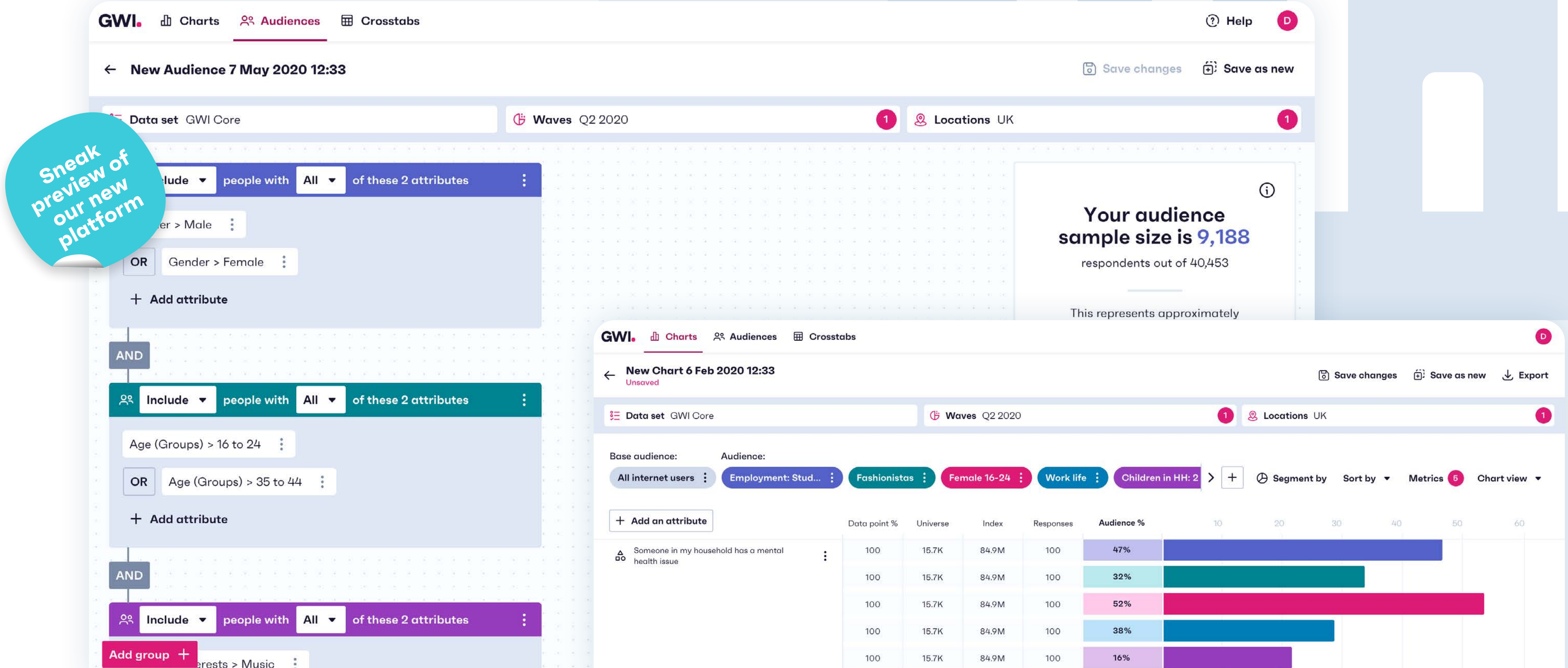
Discover the data on our platform

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 your own audiences.



Each of the graphs is numbered

More information can be found in the Appendix section at the end of this report



Just click this icon to explore the data on the platform

Source

Base

Information about the source and base

Key insights

Climate change is their number one long-term concern

Not only that, but their optimism for the future of the environment is slipping. They have their shortcomings when it comes to being eco-friendly but brands need to show eco-consciousness where possible if they're to gain rapport with Gen Z.

Online TV is now the preferred way to watch content

A landmark moment for Gen Z's viewing behaviors – Q3 2021 represents the first time Gen Z are watching more online TV than broadcast. At the same time, the popularity of YouTube and Twitch mean streaming services have new competition that will force them to adapt.

Gen Z have a truly global focus

As a generation interested in exploring the world and trying new things, brands shouldn't face many obstacles selling foreign content or products to this generation. Likewise, different lifestyle choices like plant-based diets, teetotalism, and hustle culture offer a broad scope for brands to engage with them.

TikTok continues to gain ground

Instagram is still both Gen Z's most used and favorite social media platform but that could be about to change as TikTok continues to make rapid growth – daily Gen Z engagement on the ByteDance app, outside of China, has risen an astonishing 47% since Q4 2020.

Gaming is just as big as you think it is

9 in 10 Gen Z say they play games on any device – more than any other generation. As a vital part of Gen Z culture, it's near-impossible to ignore this touchstone when reaching them. But to do this, brands need to take advantage of new opportunities in gaming if they're to appear genuine.

01

Getting to know Gen Z

Gen Z today

With the oldest Gen Z now approaching their mid 20s they're becoming acquainted with employment, home ownership, marriage, and even parenthood. This opens up new opportunities for brands whose products and services are being discovered by this generation for the first time – automotive and finance being just two examples.

It's worth remembering, however, that Gen Z still has a way to go before their spending power reaches the same level as their older counterparts. The number of global Gen Z who classify as low-earners hasn't budged much since 2019 and isn't likely to shift dramatically until the majority enter full-time employment. That being said, the story in Europe and North America is more positive – the percentage of low-earning Gen Z having fallen 5% and 24%, respectively, since 2019.

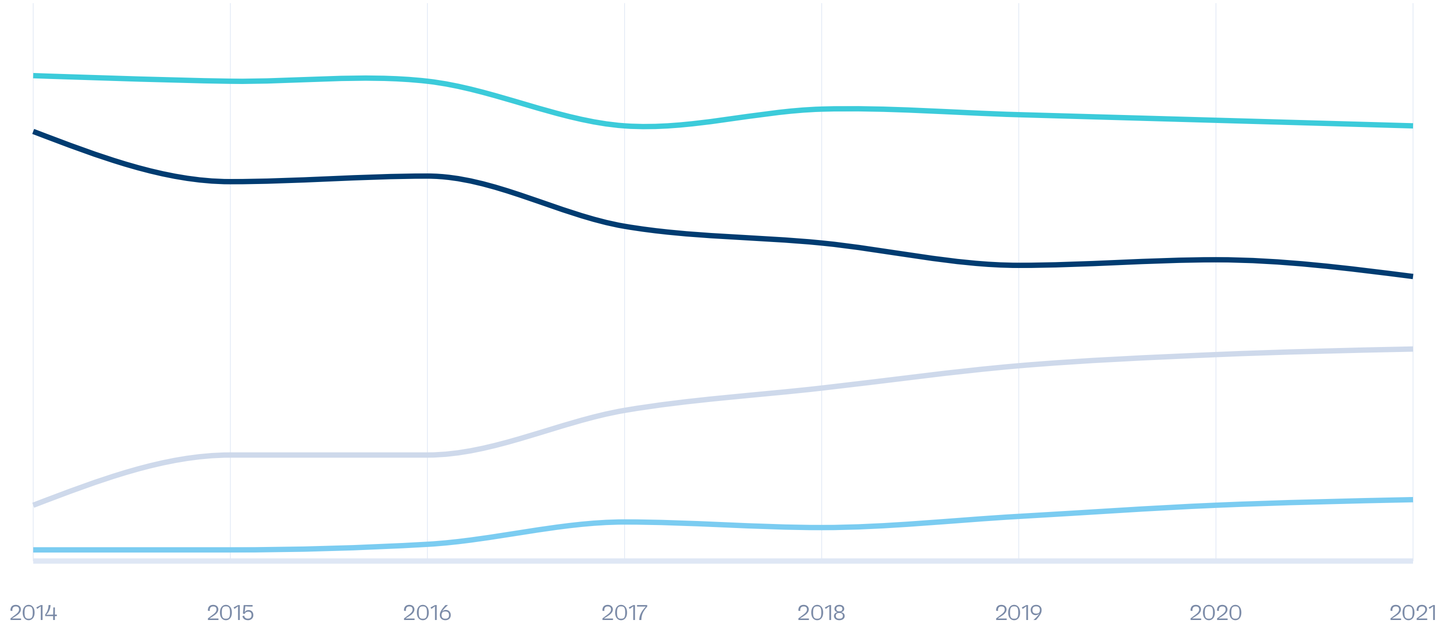
This is a generation with a lot on their plate; many are still reeling from the impact of Covid-19, while climate change is certain to weigh heavily on their lifestyle choices for years to come. Gen Z have arrived at a time of unprecedented change, forcing brands to ditch **outdated** perceptions that Gen Z are anything like millennials, and adapt to new strategies that enable them to successfully engage with this generation.

1

Gen Z are growing up

% of Gen Z who are the following

%	2014	2015	2016	2017	2018	2019	2020	2021
Single	87	86	86	78	81	80	79	78
Students	77	68	69	60	57	53	54	51
Full/part-time or self-employed	10	19	19	27	31	35	37	38
Married or parents	2	2	3	7	6	8	10	11



GWI Core 2014-2021 (Averages of waves conducted between Q1 2014-Q3 2021) 510,660 Gen Z born between 1997 and 2005

The melting pot generation

One of the most vital things we've learned about Gen Z is their curiosity for the world around them. As the first generation to be born post-internet, Gen Z's attitudes and values are largely reflective of different individuals, countries, and even **time periods**.

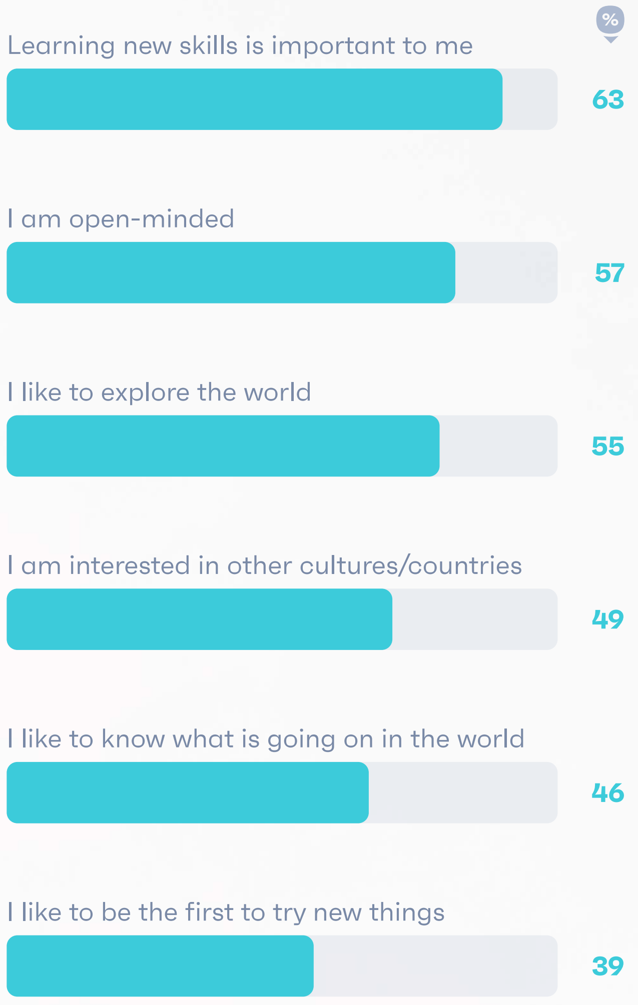
Their tendency to agree with statements like "I want to explore the world" or "I am interested in other cultures/countries" help demonstrate this in more detail but it's the resulting impact this has on their perceptions of others that's most revealing.

In early 2021, we looked at **how Gen Z shape** up compared to other generations. Asking what helps them best identify with other people, things like humor, interests, and life experience were all important. Most startlingly, however, more Gen Z said they identified with people their own age than those who spoke their language.

American Gen Zers consider diversity & inclusion more important than fashion or reputation

They’re curious about the world around them

% of Gen Z who agree with the following



GWI Core Q3 2021 48,413 Gen Z aged 16-24

Top 10 interests

2

% of Gen Z who are interested in the following

There are other subtle hints of this in our data (Gen Z lead the way for using online translation tools, for example) that demonstrate a clear indication of just how much the internet has flattened geography for them, and enabled them to form social networks based on being part of a generation.

This has huge ramifications for how brands leverage Gen Z’s interests. Other things like drink, fashion, and cooking are top interests for all consumers but, when targeting Gen Z, brands can **reach across borders** in order to widen the playing field.

Our data showcases this trend in more detail; half of Gen Z in 9 markets say they often/regularly watch foreign-language TV shows. This is cemented by a consistent wave-on-wave increase in the number of Gen Z outside Japan who watch anime, while K-pop continues to grow outside of South Korea.

Trend in action

Love at first swipe

Speaking of forging relationships, Gen Z are already rewriting the rules on online dating. Around 13% used dating apps in the last month, and while it's not a monumental figure, it's certain to grow as more Gen Z enter young adulthood – **particularly after Covid** put a pause on dating life. In fact, our Zeitgeist research from December 2021 revealed 43% of Gen Z, in 9 markets, are interested in online dating at the moment.

Online dating has come a long way from simply matching interests; there are now services that cater to all walks of life. When Gen Z are concerned, that sometimes means getting creative and tapping into their desire for instant gratification; cutting to the chase and leaving time-wasters behind.

In the same vein as Thursday (an app that gives users just 24 hours a week to organize dates) Snack looks to give Gen Z a hand in their romantic life by **reducing users' visibility** when they don't reply to messages. Other platforms have found great success by tackling **body-shaming** and safety concerns, but Snack shows how these kinds of attitudes can be baked into product development.

02

The Gen Z lifestyle

Generation green

Climate change is generally considered the biggest challenge for Gen Z (if not the world) but how do they see it affecting their future? Our data reveals 45% of Gen Z are optimistic the environment will improve in the next 6 months – climbing slightly in 2020 as global lockdowns led to a dip in **CO2 emissions**.

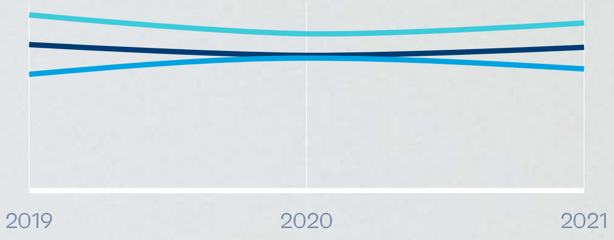
Since then, however, that optimism has faded and Gen Z are growing increasingly more concerned. In the US, consumers typically worry about healthcare, infectious disease, or gun violence ahead of climate change but for Gen Z, it's their number one concern (44%). Even if we take into account the long-term effects of the pandemic, their fears about climate change eclipse things like national debt (24%) and job security (28%). Put simply, Gen Z worry more about the planet's future than their own.

3

Gen Z's optimism for the future of the environment is decreasing

% of global Gen Z who say the following will get better in the next 6 months

%	2019	2020	2021
Your personal finances	65	58	62
The economy of the country where you live	54	50	53
The environment	43	49	45



In the US, climate change trumps all other Gen Z fears

% of US Gen Z who are concerned about the following

	%
Climate change	44
Racial relations/racism	43
Gun violence	41
Police brutality	40
Pollution	38

GWI Core 2019-2021 (Averages of waves conducted between Q3 2019-Q3 2021)
341,582 Gen Z born between 1998 and 2006
GWI USA Q4 2021 3,401 US Gen Z aged 16-24

With less spending power at their disposal, Gen Z need all the help they can get to buy affordable eco-friendly products

Even so, they have their shortcomings when it comes to being eco-friendly. They may be dubbed the **"Sustainability Generation"**, but Gen Z are behind all other generations when it comes to recycling (34% vs 41% of non-Gen Z). Likewise, American Gen Z lead the way for buying clothes they don't strictly need (29%). They still shop eco-consciously where they can – 61% say they pay more for eco-friendly products than those that aren't – but with less spending power at their disposal, Gen Z need all the help they can get to make this easier.

The obvious solution is to make eco-friendly products more accessible and more affordable – but this isn't necessarily an easy switch. What brands can do, however, is weigh up the value of independent stores. Gen Z not only prefer this kind of retail (52% say they do) but big name brands have forged successful partnerships to offer eco-friendly wares to a wider audience – like **Walmart** has with sustainable fashion brand, thredUP.

But it shouldn't stop there; brands need to ensure they're doing more behind the scenes too. Eco-consciousness is an absolute must-have for those trying to reach Gen Z. Most importantly, brands need to be **authentic** in their approach and take this matter seriously.

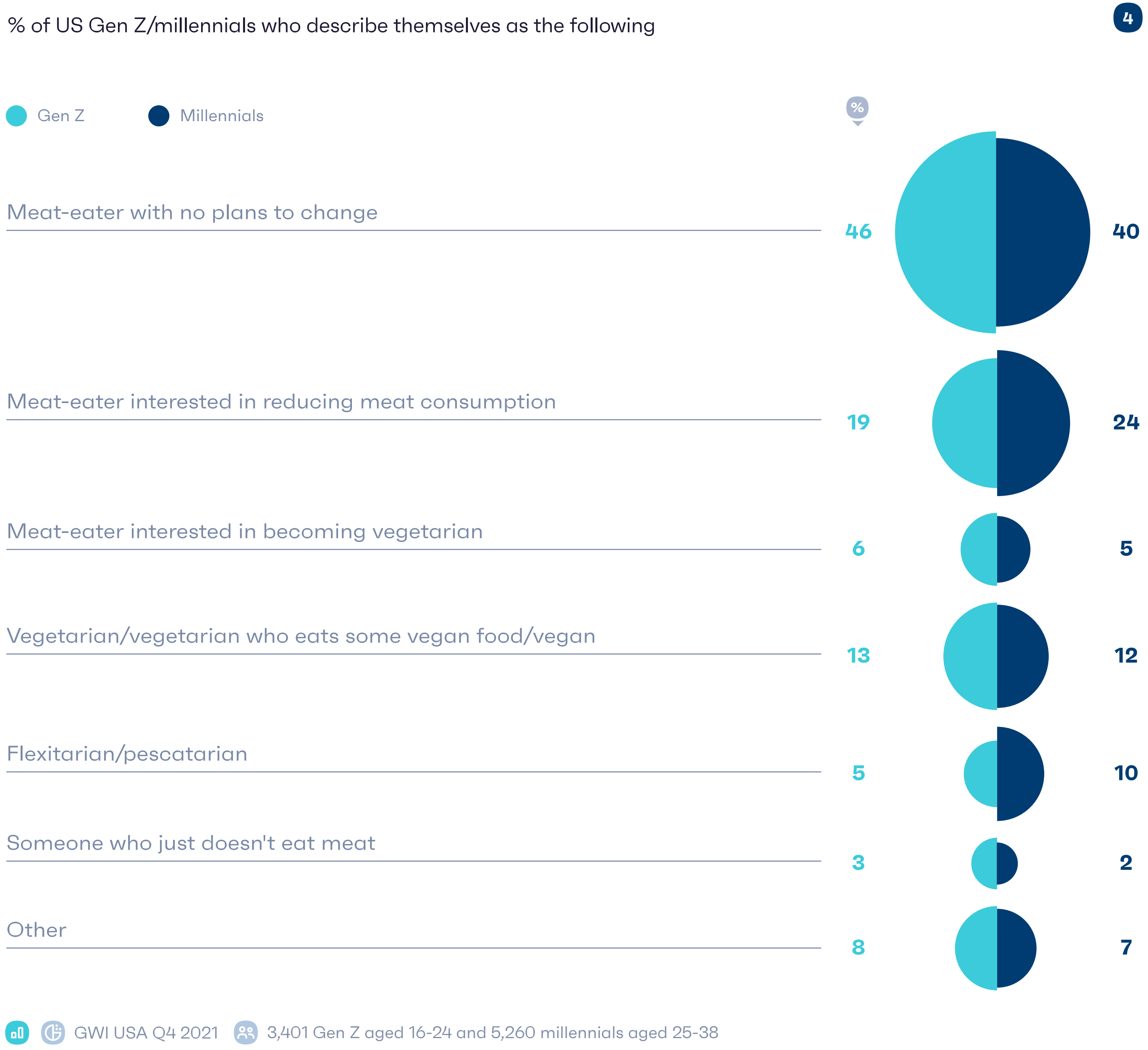
As **Patagonia CEO**, Ryan Gellert, puts it: "If you're in the game of conservation, you've got to win every single day." For older generations, sustainability is a personal thing; for Gen Z, it's political.

Veganism isn't that distinctive...

The truth about the Gen Z diet

There's something of a stereotype about younger generations and plant-based diets (millennials and their apparent love of **avocados** is sure to ring a bell) but what does our data say about Gen Z? It's certainly true that they're the generation with the most interest in vegan/vegetarian food (23%) but our USA dataset shows a slightly more nuanced narrative.

More American Gen Z say they have no plans to stop eating meat than their millennial counterparts. When it comes to being vegan, vegetarian, or a vegetarian who eats some vegan products, Gen Z and millennials are almost evenly split. This suggests the plant-based diet isn't surging among the younger generation like some might think. One possible reason behind this is that younger Gen Zers especially aren't in full control of what they eat just yet or without the income to afford these types of products, for example. Nevertheless, they're certainly setting a trend for the future of food that offers plenty of opportunity for brands in this space.

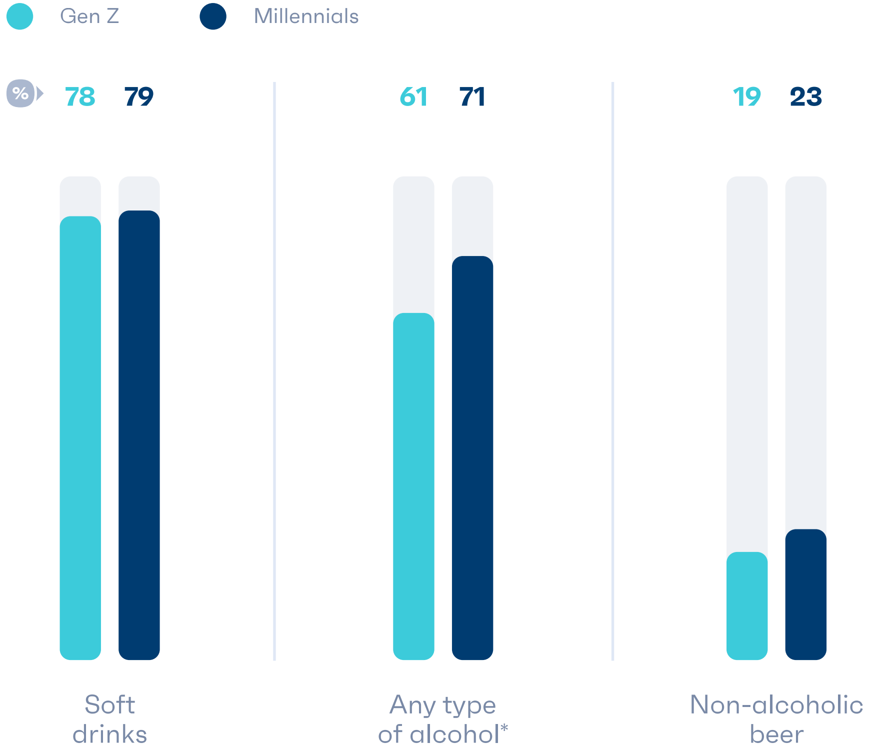


...but teetotalism might be

% of Gen Z aged 21+ and millennials who say...

“

I drink the following at least once a month



*Includes: Baijiu (China only), Beer/lager, Cognac, Cider, Gin, Liqueurs, Other alcoholic drinks (eg. White Claw, Smirnoff Ice, Redd's) (USA only), Rum, Sparkling wine, Tequila, Vodka, Whiskey, or Wine

GWI Core Q3 2021 24,397 Gen Z aged 21-24 and 71,174 millennials aged 25-38

One thing that does stand out is their drinking habits, namely teetotalism. While non-alcoholic beer is more popular among millennials, Gen Z aged 21+ are less likely to drink any kind of alcohol every month than any other generation. Like choosing a plant-based diet, why Gen Z are choosing to reject alcohol could come down to a number of reasons. In the US Gen Z who don't drink typically cite reasons like cost (20%), to avoid getting drunk (31%), or simply the taste of alcohol (38%) but the **environmental impact**, or even a rise in the number of **drink spikings** should all be taken into account.

This doesn't mean disaster for alcohol brands; it means adapting. Aside from boomers, every generation drinks more soft drinks than they do alcohol, but the gap between the two among Gen Z is visibly the most startling – an opportunity for brands in this space to try new products that promote an alcohol-free night. Heineken, for example, **invested** $50 million in marketing non-alcoholic products. Likewise, while the fast rise of hard seltzers offered a **healthier alternative** to other types of alcohol, it's time to experiment with **"soft seltzers"** that directly respond to this trend.

The number of Gen Z, aged 21+, who drink non-alcoholic beer has grown 9% since Q1 2020

The ongoing mental health crisis

Our **Connecting the Dots** report in November 2020 laid bare how a looming mental health crisis would affect consumers following a year of lockdowns and tragedy. Throughout 2021 we saw a number of headlines that showcased just how severe some of these concerns were; people unable to see therapists and other professionals for **long periods** of time, or athletes **pulling out** of events to prioritize their mental wellbeing.

For Gen Z, the topic of mental health is fast becoming a hallmark. Even at a time where "it's okay to not be okay" just 1 in 3 are comfortable talking about their mental health – a figure that remains unchanged since we began tracking it in Q2 2020. At the same time, the number who say they or someone in their household has a mental health condition keeps growing year-on-year (+30% between 2018 and 2021).

We've already noted just how concerned Gen Z are about the future of their planet but with the pandemic affecting their social, academic, and professional lives it's clear that there will be more obstacles to face – and they shouldn't have to do it alone. There are plenty of examples of brands spreading awareness of this. **Maybelline**, and **JanSport** have encouraged consumers to share personal stories that make affected individuals feel supported.

There's work being done to increase funding for more professionals to help individuals with their emotional wellbeing, but schools and workplaces (particularly those with younger staff) need to **consider what they can do** to better look after their own. Likewise, marketing to Gen Z needs to be more reflective of the real issues that affect them, showing empathy and understanding.

A generation of hustlers

With nearly 4 in 10 Gen Z now in full or part-time roles, they're quickly making their mark on the working world. Describing themselves as ambitious (40%), adventurous, (42%) and confident (47%), it's little wonder why being successful or financially secure sit among the top 5 values most important to them.

Forbes' 30 under 30 list recently recorded its largest **representation** of Gen Z ever recorded. Their strong work ethic and hustle culture offers marketers an important touchstone when reaching them.

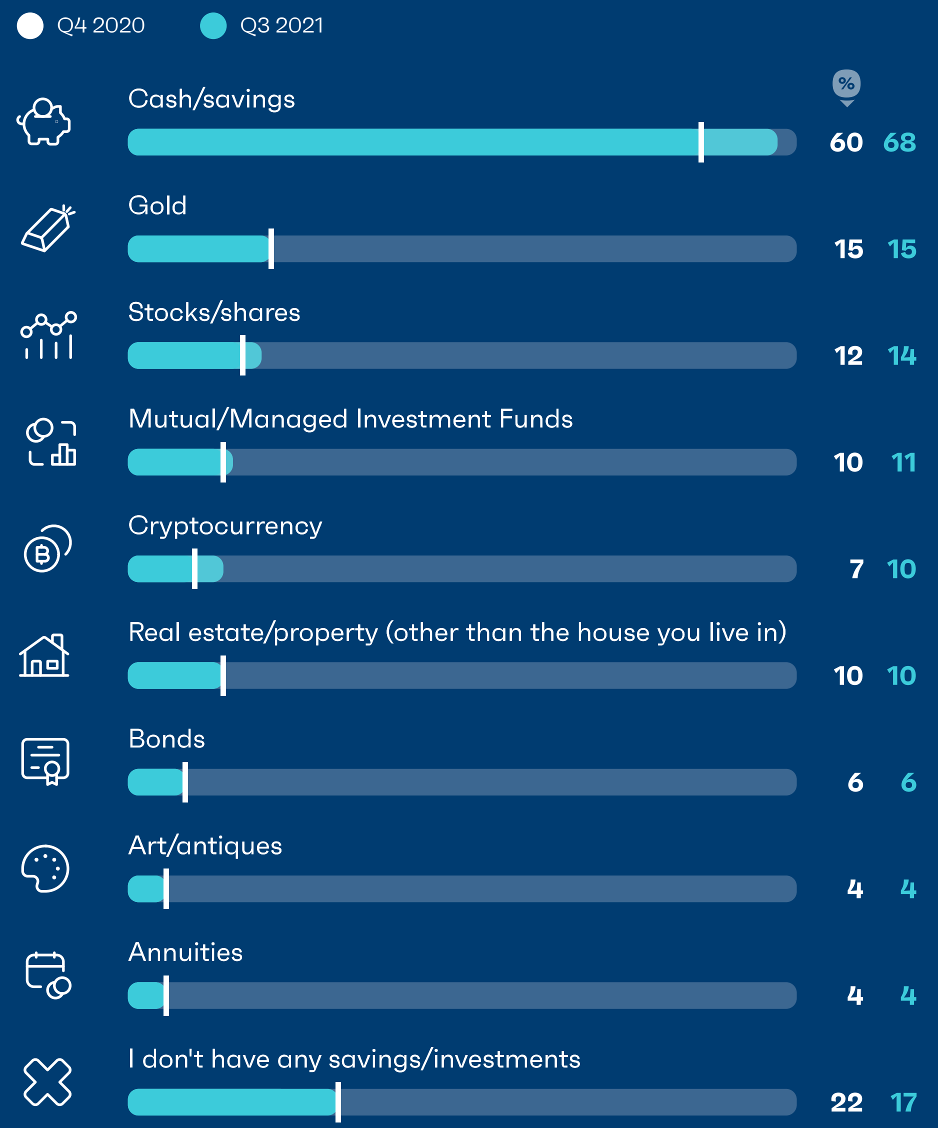
In the meantime, they're certainly keeping themselves busy with other sources of income. A **Bank of America study** found Gen Z to be very active side-hustlers after the pandemic began, while our USA data shows half of them have undertaken some form of gig economy work in the last year – food delivery and selling items online the most prominent among them.

We also can't talk about Gen Z's earnings without mentioning their affinity for investing. Since Q4 2020, the number who own any kind of savings/investments has risen 27%, driven mostly by cash/savings funds, stocks/shares, and cryptocurrency. Investing apps and Fintech brands are already nurturing this interest by introducing new features that appeal to Gen Z's financial side; Coinbase **partnered** with Mastercard to smoothen the process of buying and selling NFTs, while Moneybox introduced a **Lifetime ISA** for those planning to buy their first home.

They're keen investors

5

% of Gen Z who have any of the following savings/investments



GWI Core Q4 2020 & Q3 2021

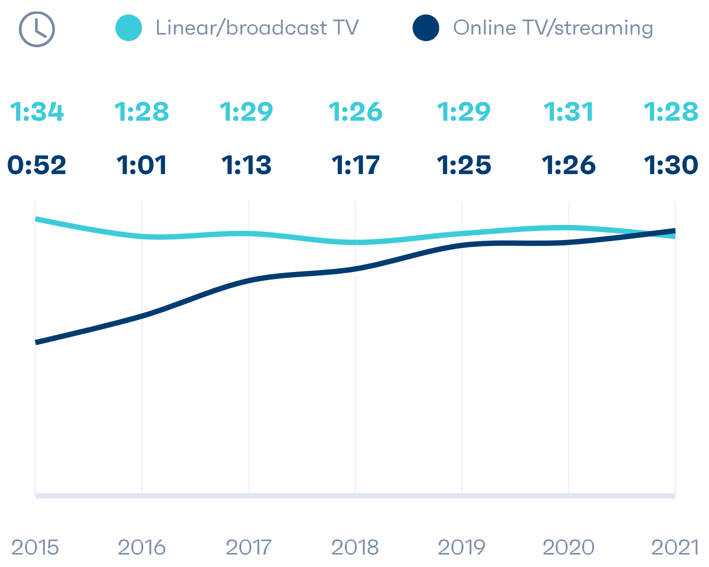
37,473 (Q4 2020) & 48,413 (Q3 2021) Gen Z aged 16-24

03

Entertaining Gen Z

Online is now Gen Z's preferred way to watch TV

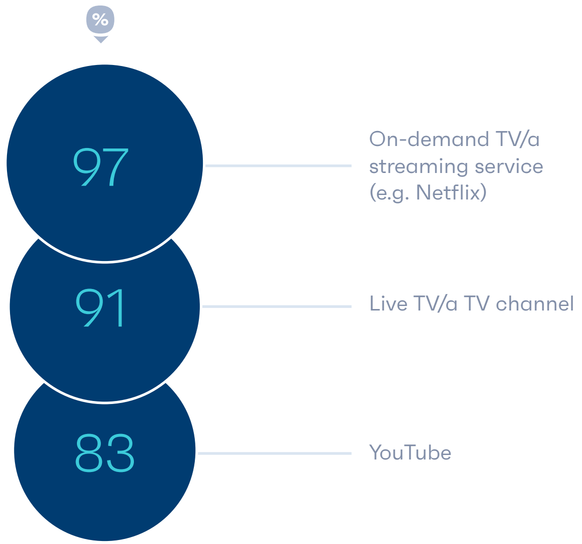
Average time spent on the following each day in h:mm



TV splits into three

6

% of Gen Z outside of China who have watched the following in the last month



GWI Core 2015-2021 (Averages of waves conducted between Q1 2015-Q3 2021)

345,982 Gen Z born between 1997 and 2005

The age of streaming

Q3 2021 was a landmark moment for Gen Z's viewing behaviors – the first time they're watching more online TV than broadcast.

It's not necessarily surprising that this has happened, more that it took this long to do so. In Q1 2021, Gen Z time spent on TV streaming finally caught up with broadcast when they started spending an average of 1 hour 29 minutes on the two every day. That remained the case throughout Q2 2021 as broadcast clinged to a pandemic-induced boom.

Make no mistake, broadcast TV is still going strong, but this data confirms a need for live TV to exist symbiotically with streaming; the same way Paramount+ in the US, or ITV Hub in the UK do, for example.

Where online TV goes from here is interesting. A look at the top 10 video services among Gen Z, outside of China, shows that while Netflix holds a decent share of Gen Z viewers (60%), YouTube leads the way by a considerable margin (83%) – with YouTube Premium and Twitch both creeping into the top 5. The video sharing site is still behind live/broadcast TV but its impressive performance shows just how much younger audiences have changed the nature of TV viewing.

Brands aren't shying away from the value of livestreaming – we've seen **fast food** chains and even **politicians** break new ground on Twitch in the past few years. More importantly, it's a learning curve for online TV; just as online and broadcast need to work together, livestreaming is starting to **do the same** for online TV in turn.

Reaching Gen Z gamers: A tutorial

Just shy of 9 in 10 Gen Z play games on any device, beating out millennials and all other generations for doing so. This isn't likely to change anytime soon, with 85% of 12-15 year-olds in our Kids dataset saying this.

As a vital part of Gen Z culture, it's near-impossible to ignore this touchstone when reaching them. At the same time, it's crucial to approach the subject with authenticity, with gaming campaigns often subject to intense **scrutiny**.

We've made no secret about how brands need to **normalize gaming** in their campaigns if they're to engage with gamers, and for Gen Z that couldn't be more true. To really nail down their relationship with the activity, however, you need to know more than what they're playing – you need to understand why. For Gen Z, gaming is a highly social activity that enables them to play with people they know and meet those they don't. In Q2 2021, our gaming dataset revealed Gen Z gamers, in 16 markets, were 29% more likely to play games to socialize with their friends. While our global data from Q3 2021 shows some of their most distinct gaming activities are: playing with real-life friends, sharing gaming content, or watching livestreams and tournaments.

One of the best ways for brands to learn more about gaming is to get involved themselves. We've seen just how powerful livestream platforms like Twitch have been for engaging with viewers, but some brands have actually built their own space within games to showcase their products – with tools like Fortnite's **Creative Mode** heavily supportive of this.

Gen Z prefer a social gaming experience

7

% of Gen Z gamers that have done the following in the last month (sorted by over-index)

GWI Core Q3 2021 14,175 Gen Z gamers aged 16-24

Listening in to their music & audio tastes

While consumers typically **listen to music** that matches the decade they were born/grew up in, Gen Z break the mold – hip-hop is their favorite genre, while 00s music sits in at number 5. But this isn't the only way Gen Z music tastes are different.

We noted earlier how Gen Z culture is shaped by their interaction with people all around the world, and this couldn't be more clear in their music tastes, with interest in Latin and K-pop music growing since Q4 2020. There's a clear exchange of culture happening here. Half of Gen Z in 9 markets say they often/regularly watch foreign-language TV shows or films; and there's a similar trend happening in music. The K-pop genre has grown 8% among Gen Z in Europe and North America while interest in Latin music has grown 18% among those in APAC.

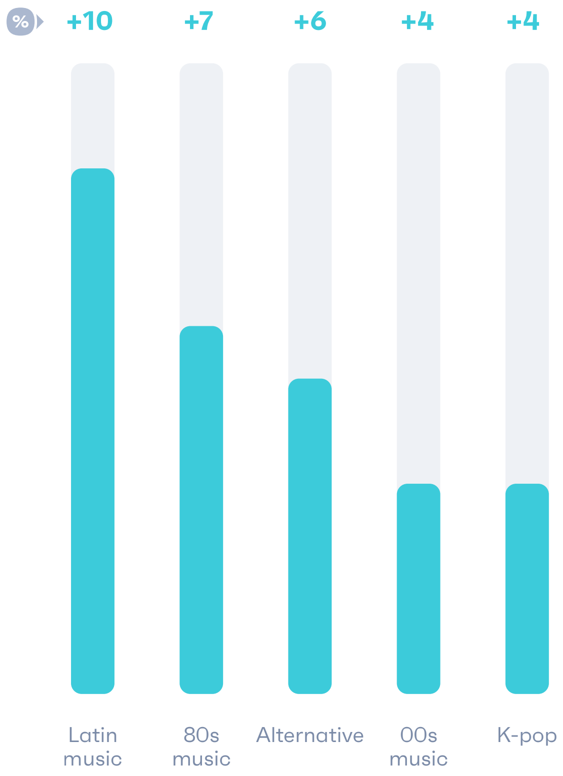
For the most part, we can put this down to social platforms like TikTok – typically credited with the **"Korean wave"** we see in the West – but there's also cultural preservation at play. Among American Gen Z, who are Asian, Black, or Hispanic, 40% say they use music to connect with their heritage. Over time, as cultures blend with one another and individuals move across the globe, these musical connections will move with them.

Podcasts have also struck a chord with Gen Z. In 8 markets, 39% say they listen to mostly, or exclusively podcasts. This is more or less equal to the number who say the same for music (32%), showing just how important this form of audio has become. In fact, Gen Z worldwide are now almost equally likely to discover new brands on music streaming or podcasts.

To get the best results out of ads on podcasts, however, brands may want to give hosts more creative freedom – with Gen Z listeners preferring hosts to do ads in their own style.

Different countries and time periods are influencing Gen Z music tastes

% change since Q4 2020 in the music genres Gen Z listen to



GWI Core Q4 2020 - Q3 2021

118,335 Gen Z born between 1998-2006

04

Social media

It's TikTok's time

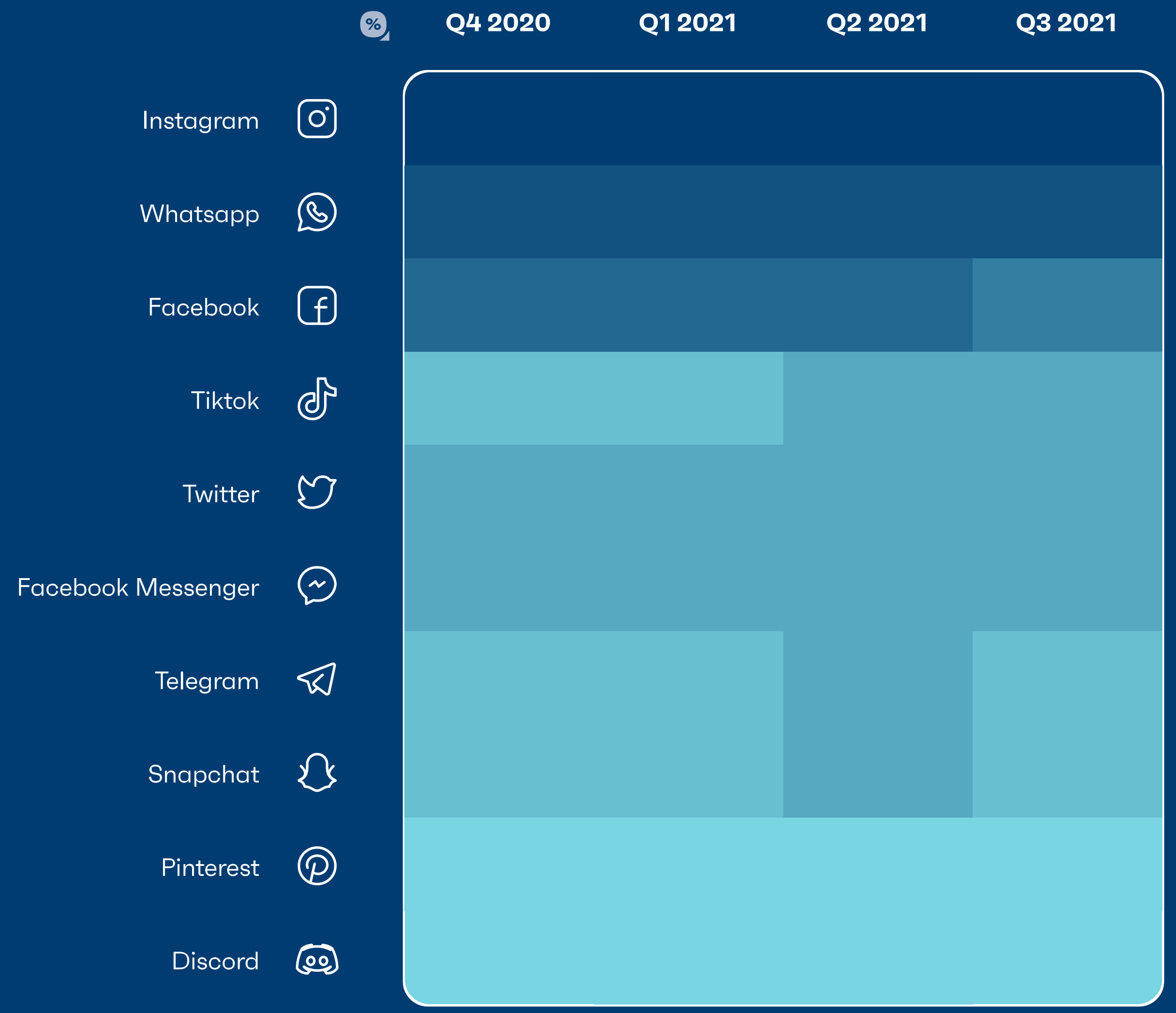
Instagram is still both Gen Z's most used and favorite social media platform but that could change as TikTok continues to make rapid growth – daily Gen Z engagement on the ByteDance app, outside of China, has risen an astonishing 47% since Q4 2020.

The success of the platform, particularly in such a short time, is profound. Most of it is often chalked up to **lockdowns**, but Gen Z were already the **dominant** audience on TikTok by the time it caught the attention of other generations – so what makes it so appealing? While Instagram still leads by some margin when it comes to users performing a number of actions – Gen Z are distinctly more likely to use TikTok when searching for funny content, demonstrating just how effective the short-form video format has become.

New players are quickly climbing through the ranks of social media

9

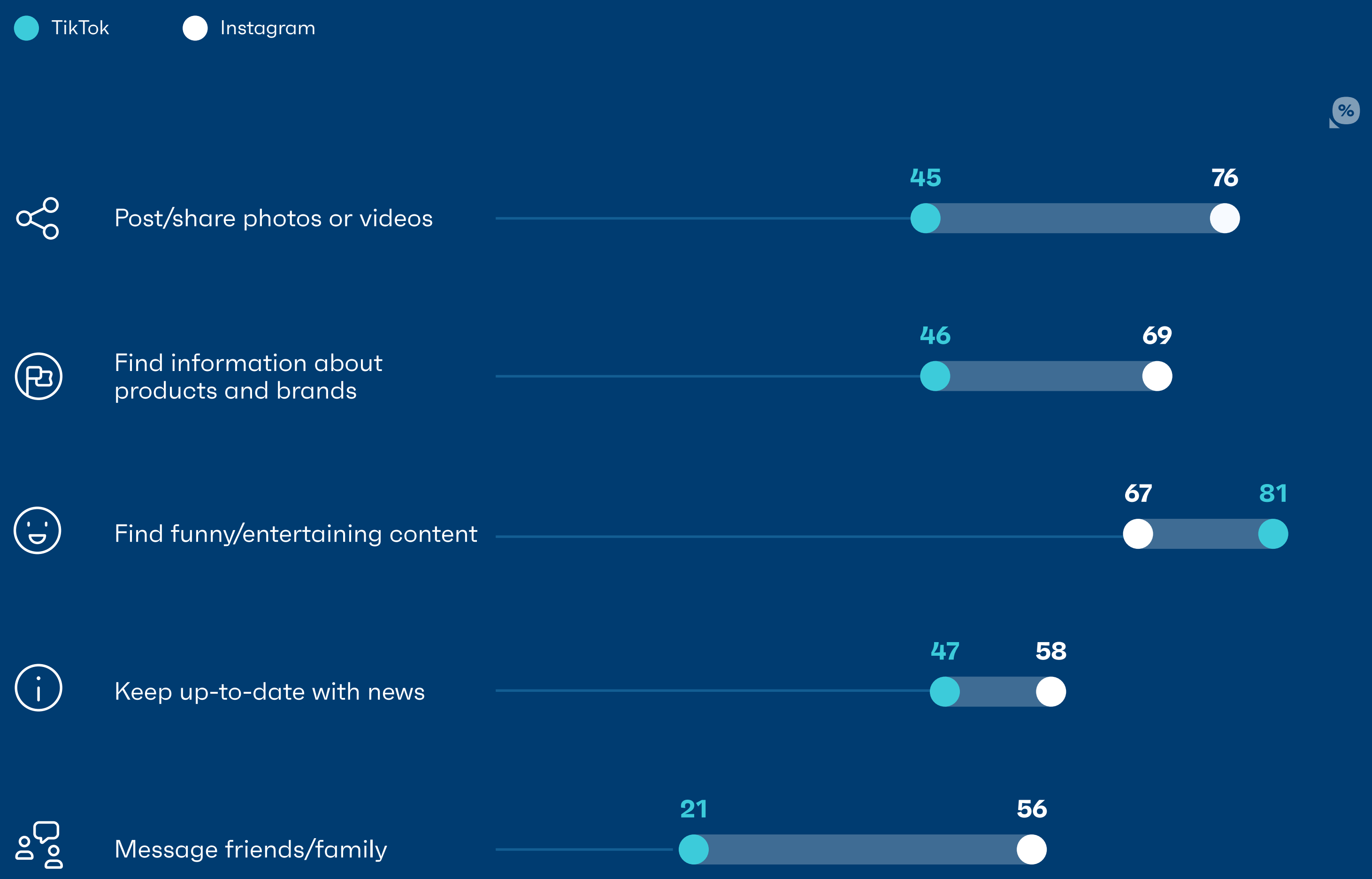
% of Gen Z, outside of China, who use the following at least daily



GWI Core Q4 2020-Q3 2021 152,155 Gen Z internet users outside of China

Instagram vs TikTok

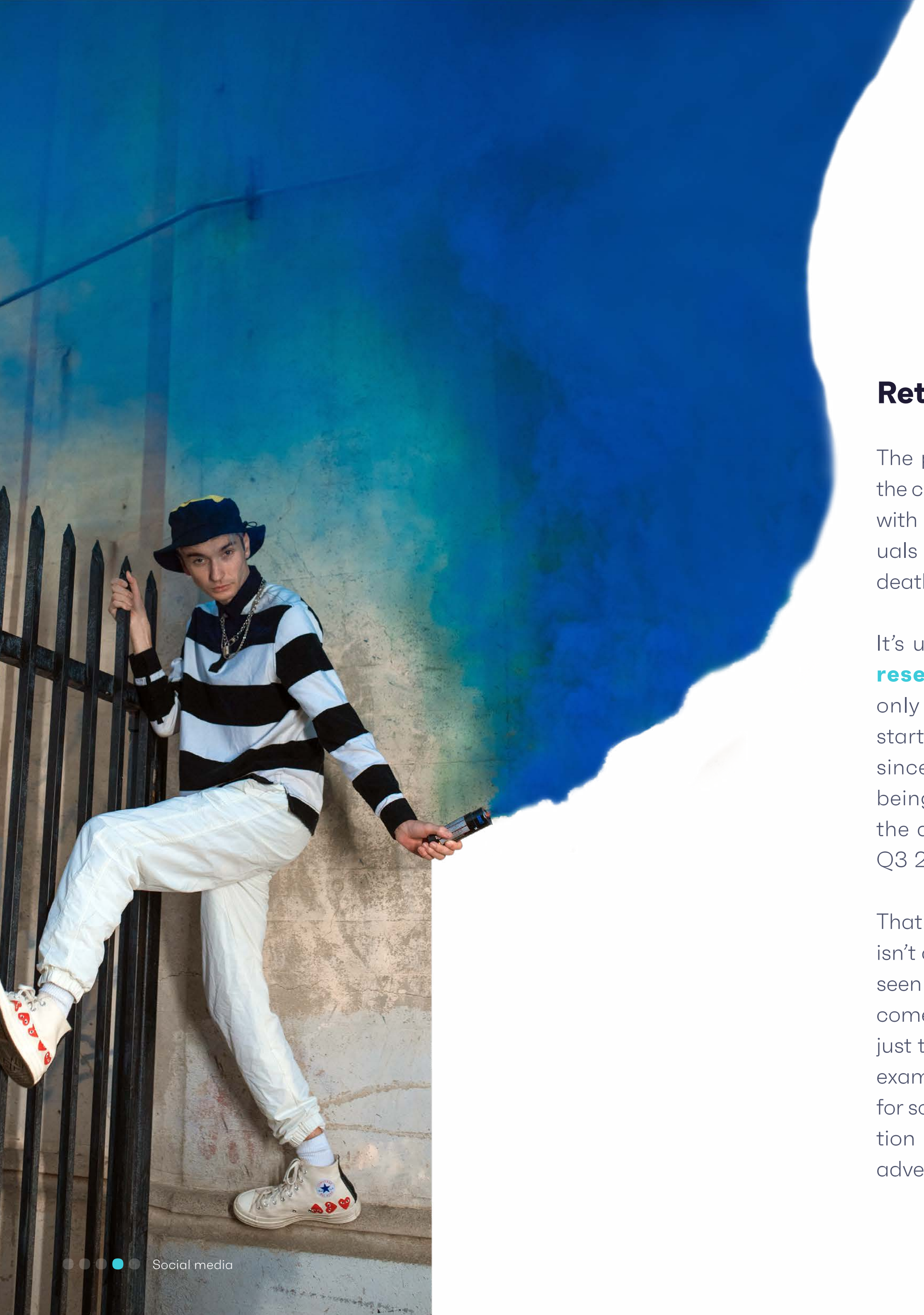
% of Gen Z TikTok/Instagram users, outside of China, who use the platforms to do the following



GWI Core Q3 2021 | 28,335 Gen Z TikTok users and 36,772 Gen Z Instagram users aged 16-24

TikTok's extraordinary appeal hasn't gone unnoticed by rival services, with many taking inspiration from its distinct format to retain users – and TikTok is **doing the same** in response. But while this is a standard practice to remain competitive, there are other platforms carving out their own niche with Gen Z; Discord among them. The VOIP/messaging service has quickly picked up steam with Gen Z and is popular with brands as a means of engaging with consumers in new, **creative** ways.

Monthly use of Telegram Messenger from Gen Z outside of China has grown 11% since Q4 2020 – the app experiencing an **explosion** of new users following the outage of Meta's Facebook Messenger and WhatsApp services. The appeal of end-to-end encryption messaging resonates with Gen Z's privacy-conscious approach to social media, with over 3 in 10 in the US saying social media companies should do more to protect users' data.



Rethinking influence

The pandemic has some questioning the content that online influencers post, with backlash toward certain individuals asking the **question**: "is this the death of the influencer?"

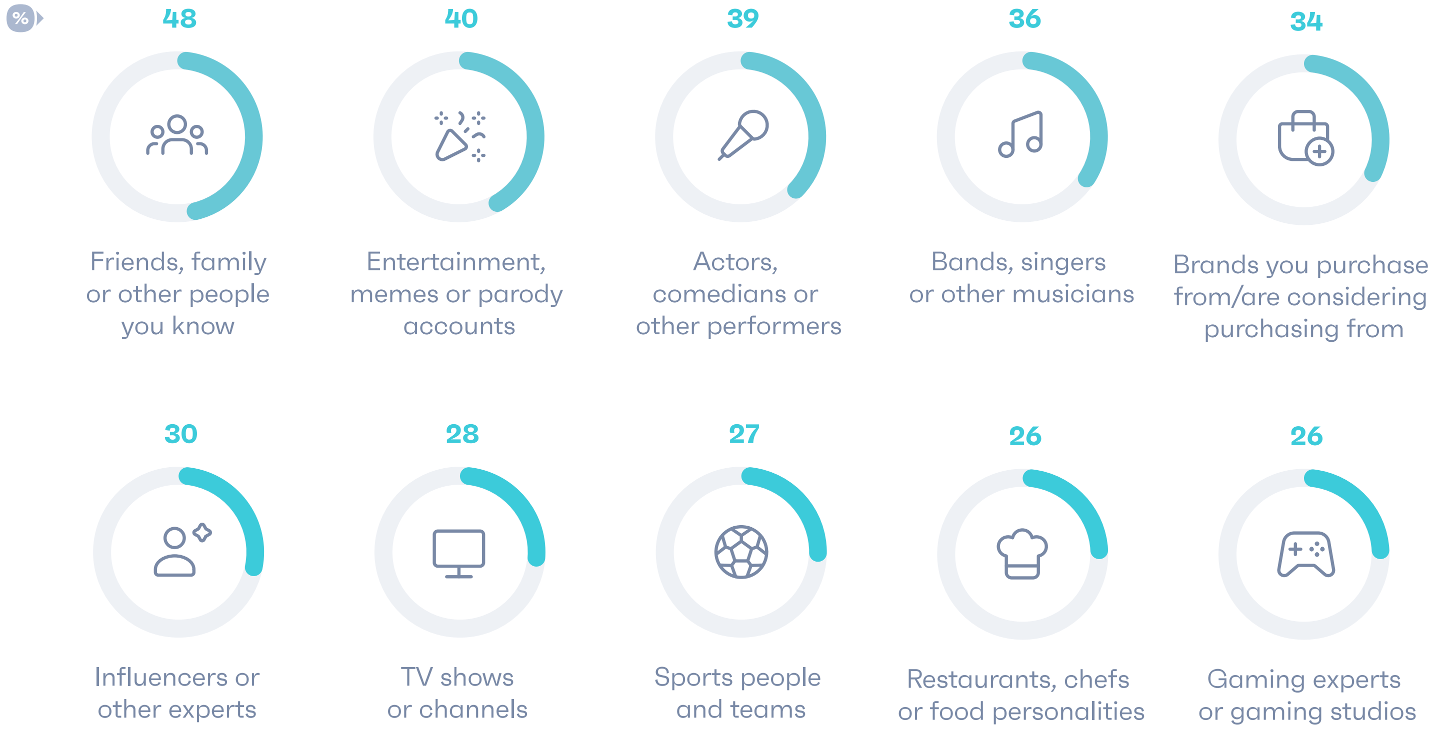
It's unlikely, for several reasons. Our **research** has revealed that not only have more social media users started following influencer accounts since 2020, but Gen Z lead the way, being 31% more likely to do so than the average social media user as of Q3 2021.

That doesn't mean influencer content isn't changing, however. For one, we've seen a number of sporting influencers come into prominence for more than just their career; Marcus Rashford, for example, has become a key figurehead for social issues in the UK – not to mention a range of **thought-provoking** advertisements from Google.

Accounts followed

10

% of Gen Z social media users who say they follow these accounts on social



GWI Core Q3 2021 47,912 Gen Z social media users aged 16-24

Learn what matters to Gen Z on social

% of Gen Z social media users who say

> I most want to see the following from people on social

%

58 Funny/light-hearted content

52 Content I find inspirational

51 Sharing information that helps people

48 Content that looks good

41 Content that's relatable to my situation

40 Reviews/opinions on products they've used

36 Content about their life

36 Taking a stance on important issues

21 Content that doesn't use image filters

GWI Zeitgeist September 2021 1,359 Gen Z social media users in Brazil, France, Germany, India, Italy, UK, and the US

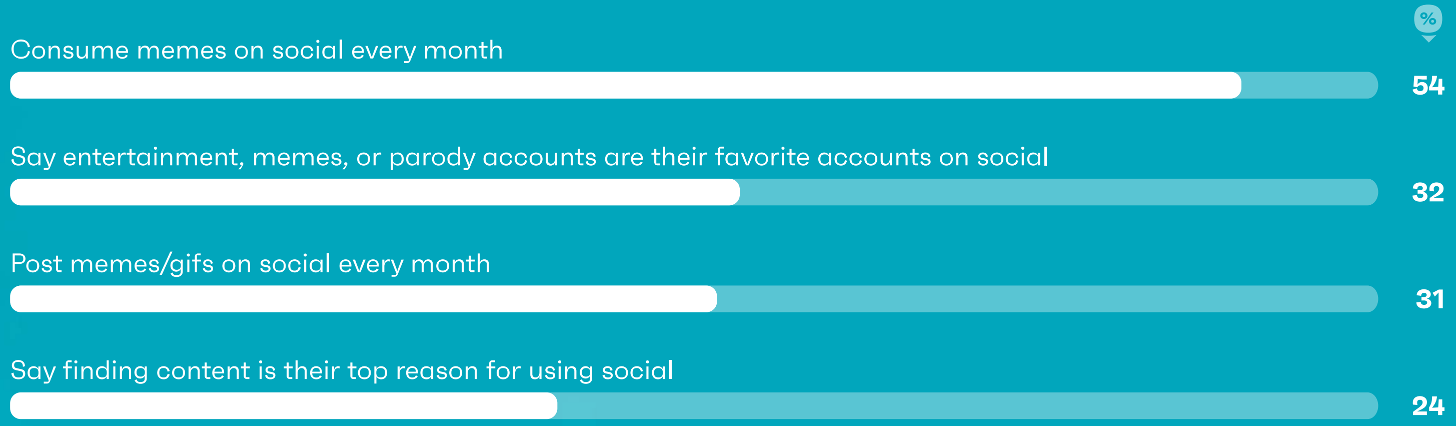
What's key is authenticity. A Zeitgeist survey we fielded in September 2021 showed 41% of Gen Z social media users, in 7 markets, most want to see content that's relatable to their situation. As a generation with striking figures for mental health concerns, it's little wonder why Simone Biles received such a positive response from Gen Z.

As brands scope out potential, long-term partnerships with influencers, they need to consider the content they post and how that resonates with their image. Gen Z want to see themselves in advertising, and feel as though brands are being genuine when they align with select individuals – not find themselves confronted with unrealistic depictions and filtered images.

The perfect Gen Z campaign doesn't exist...

% of US Gen Z social media users who...

11



GWI USA Q4 2021 3,346 US Gen Z social media users aged 16-24

Know your meme

Social media is still very much a social place; consumers use it to keep in touch with friends/family above all else, and the case remains the same for Gen Z.

Outside of this, they spend their time finding new content, seeing what's happening in the world, and generally filling their spare time. But that doesn't necessarily mean news and events...

It's time we talked about memes.

Globally, 40% of Gen Z social media users follow meme/parody accounts and, in the US, it's the content they view most every month – 46% more likely to do so than the average user. With some of the biggest meme accounts online boasting upwards of **20 million followers**, memes have incredible potential for brands who understand how to use them; Netflix even uses **certified accounts** to encourage meme-creation with followers online.

By now, every brand should have dipped their toe in meme creation, but in an ever-growing landscape it can be difficult to keep up to speed; that's why brands need to follow meme accounts if they're to find formats they can use. From here, they can use templates to create their own memes and craft simple, but effective, campaigns that engage with Gen Z on a more personal level. It's important to bear in mind how **multimedia** Gen Z's experience of the web is, incorporating video, image, and text – memes are almost a kind of grammar for how they communicate. Speaking their language requires understanding and implementing that grammar.

Memes are almost a kind of grammar for Gen Z - by now, every brand should have dipped their toe in meme creation

05 Marketing to Gen Z

The Gen Z purchase journey

Brand discovery

% of Gen Z who discover new brands/products via the following (sorted by over-index)

	%	IDX
Vlogs	17	1.32
Endorsements by celebrities or well-known individuals	20	1.29
Posts or reviews from expert bloggers	19	1.18
Ads on music-streaming services	16	1.17
Ads/sponsored content on podcasts	14	1.17

Online product research

% of Gen Z who look for more information about brands, products, or services via the following (sorted by over-index)

	%	IDX
Vlogs	19	1.31
Micro-blogs (e.g. Twitter)	19	1.17
Online pinboards	13	1.16
Social networks	50	1.14
Video sites	26	1.14

Online purchase drivers

% of Gen Z who say the following would most increase their likelihood of buying a product (sorted by over-index)

	%	IDX
Ability to pay with cash on delivery (select markets only)	21	1.16
Lots of "likes" or good comments on social media	25	1.12
Exclusive content or services	17	1.11
Click & Collect delivery	17	1.11
Option to use "buy" button on a social network	14	1.08

Brand advocacy

% of Gen Z who say the following would most motivate them to advocate a brand online (sorted by over-index)

	%	IDX
Access to exclusive content or services (e.g. music, videos, etc.)	23	1.13
When something is relevant to my friends' interests	24	1.10
Love for the brand	37	1.10
When something enhances my online reputation/status	18	1.07
The feeling of taking part/being involved	24	1.05

GWI Core Q3 2021 48,413 Gen Z aged 16-24

Smoothing the shopping experience

Social media has become something of a “one-stop-shop” for Gen Z; a place they can discover and buy products without ever having to leave the app. It’s a reminder for brands that haven’t already to strengthen their social media presence on Gen Z’s favorite platforms and take advantage of shopping features where they can.

But looking at the purchase journey from the perspective of their most distinctive attitudes and behaviors sheds light on other ways for brands to smoothen the experience. As a generation that values influencers, they’re more likely than average to discover new products from celebrity endorsement or vloggers.

These sources are invaluable in the research stage too. Over half of Gen Z research products before they buy them, meaning they’re a highly informed audience that’s unlikely to buy on impulse. With a brand’s reputation in the hands of third-party sources, it’s imperative that they nail down meaningful partnerships with voices of influence.

But brands can sway Gen Z opinion by appealing to their distinct purchase drivers. Free delivery is a staple of all consumers, and other money-saving incentives like vouchers will no doubt strike a chord with Gen Z – particularly as this generation grows its spending power. It’s status, however, that will really win them over. Gen Z are 11% more likely to buy products if they gain access to exclusive content & services, and 13% more likely to advocate brands that offer this. Discord should be on brands’ radars here; giving them a space to create exclusive environments for their fans to gather, chat, and opt-in for exclusive promotions.

Brands shouldn’t forget the importance of the basics though. Having influential allies will help spread the word but Gen Z don’t forget the value of high-quality products and all-round good customer service.

Gen Z are more likely to discover products on social than search engines

Flexi-pay

As users make their way to the online checkout, "buy now, pay later" options can make for a tempting way to put off spending. For Gen Z, a generation consisting mostly of low-earners, these kinds of schemes are taking off. This is particularly the case in APAC, where over 1 in 5 used any such service in the last month.

While fears of a **"debt cliff"** have been raised in regards to these younger consumers, brands can help to alleviate these concerns by taking simple steps like: limiting the amount users can spend, or requiring more checks for users to sign up.

Remember, Gen Z are more financially savvy than you might think; they're keen investors, and around 3 in 10 use their mobiles to track spending habits. If brands are upfront about the risks of flexi-payment schemes, they're a valuable way of speeding up the purchase journey and enticing consumers to spend more on products.

Brands and Gen Z

As a generation that identifies with others their age, it's little wonder why they're 33% more likely to want brands that come across as "young".

It's a quality that some are likely to find easier to nail down than others, but that's where influencers and celebrities come in. With an understanding of what Gen Z are looking for, brands can better embody the qualities they look for without coming across as disingenuous.

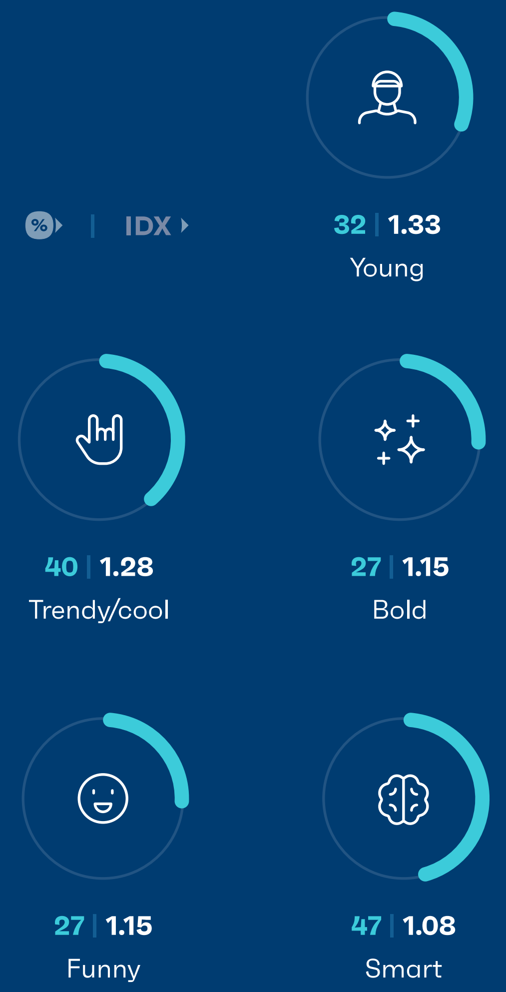
At the same time, fortune favors the bold. This means conveying a message that shows brands are listening to what matters – even if it means taking a risk. After the widespread BLM protests in 2020, for example, numerous brands came forward to announce company-wide changes (including the names of their own products) in a show of solidarity. It appeals to Gen Z's charitable side but it also gets them talking.

What's interesting is how Gen Z are equally likely to say they want brands to run community forums and improve their image and reputation; they want to stand out in a crowd but also meet others like them. We've discussed the potential of Discord here as a fast-growing community platform for brands but that doesn't rule out services like Reddit or Facebook here. Brands can take advantage of social media status features (like badges and upvotes) to reward consumers with visible "awards" that set them apart from their peers and encourage input from other users in the group.

To act on this, brands can rely on such forums to understand Gen Z broadly, but offer personalized products to help them stamp their own identity on things they buy.

Brand qualities

% of Gen Z who want brands to be the following (sorted by over-index)



Brand actions

13

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

GWI Core Q3 2021 | 33,051 Gen Z aged 16-24

Want more answers?

Our custom research gives you the power to ask whoever you want, whatever you want

Find out more

Appendix

1. How old are you?

2. Which of these things are you interested in? • Which of the following things are important to you? • Which of the following do you feel describes you?

3. In the next 6 months, how do you think the following will change? • Which of these things do you worry about?

4. Which of the following would you describe yourself as? • How frequently do you drink the following?

5. What kind of savings/investments do you have?

6. On an average day, how long do you spend watching television? • On an average day, how long do you spend watching online television / streaming?

   Which of these have you watched in the last month? • In the last month, which of these services have you used to watch / download TV shows, films or videos?

7. Thinking about gaming, which of these things have you done? (In the last month)

8. Which of these music genres do you like listening to?

9. How often do you visit or use these services? • Which platforms/services do you use to do the following?

10. Which social media accounts do you follow or subscribe to? • What do you most like to see from people/groups you follow on social media?

11. Which of these have you viewed on social media in the last month? • Which of these have you posted/shared on social media in the last month? • What are your favorite types of social media accounts? What are your top three reasons for using social media?

12. How do you typically find out about new brands and products? • Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services? • When shopping online, which of these features would most increase your likelihood of buying a product? • What would most motivate you to promote your favorite brand online?

13. Which of these do you want brands to be? • Which of these things do you want brands to do?

Notes on methodology

Introduction

All figures in this report are drawn from GWI'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, GWI interviews over 700,000 internet users aged 16-64 across 47 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 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.

Sample size by market

This report draws insights from GWI's Q3 2021 wave of research across 47 countries, with a global sample of 204,493 respondents.

Argentina	1,582	Morocco	1,064
Australia	4,382	Netherlands	1,313
Austria	1,300	New Zealand	1,312
Belgium	1,311	Nigeria	802
Brazil	5,785	Philippines	3,155
Canada	4,860	Poland	2,102
China	24,983	Portugal	1,279
Colombia	2,574	Romania	1,359
Denmark	1,557	Russia	4,334
Egypt	1,847	Saudi Arabia	1,568
France	10,725	Singapore	3,181
Germany	10,698	South Africa	1,583
Ghana	847	South Korea	1,975
Greece	1,299	Spain	10,535
Hong Kong	1,833	Sweden	2,625
India	13,743	Switzerland	1,564
Indonesia	5,251	Taiwan	2,339
Ireland	1,303	Thailand	3,860
Israel	1,551	Turkey	2,048
Italy	5,253	UAE	1,874
Japan	5,291	UK	10,428
Kenya	796	U.S.A.	24,692
Malaysia	3,834	Vietnam	2,557
Mexico	4,339		

Mobile survey respondents

From Q1 2017 on, GWI 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.**

Internet penetration rates: GWI versus ITU figures

As GWI's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced right) 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 GWI's markets

Because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe and North America to lows of around 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 in North America, much of Europe and places in APAC such as Japan and Australia.

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. In some Middle Eastern, African and Asian countries (e.g. India, Indonesia), we would also expect a gender-based skew towards males. Generally, younger internet users are more active and engaged with a lot of the behaviors and services tracked by GWI, which means % scores will typically be higher in low-to-medium-penetration markets.

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