Gen Z

GWI's report on the latest trends among internet users aged 16-25

GWI.

In this report

Gen Z are well and truly here. This report will dive into who Gen Z are today and take a closer look at their attitudes, lifestyle, and how brands can engage with this key generation.

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 that online populations are more young, urban, affluent, and educated than the total population.

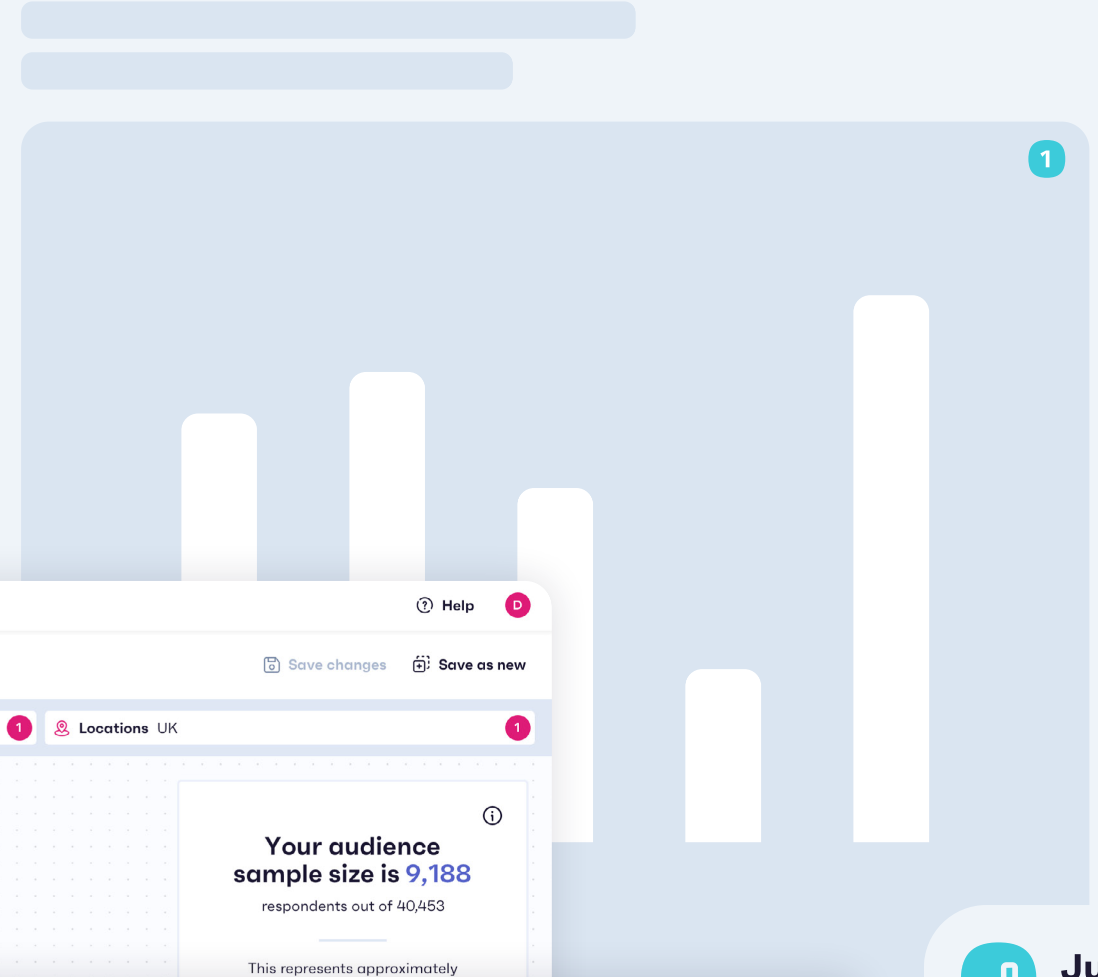
Each year, GWI interviews over 900,000 internet users aged 16-64 in 50 countries via an online questionnaire for our Core dataset. A proportion of respondents complete a shorter version of this survey via mobile; hence the sample sizes presented in the charts may differ as some will include all respondents, and others will include only respondents who completed GWI's Core survey via PC/laptop/tablet.

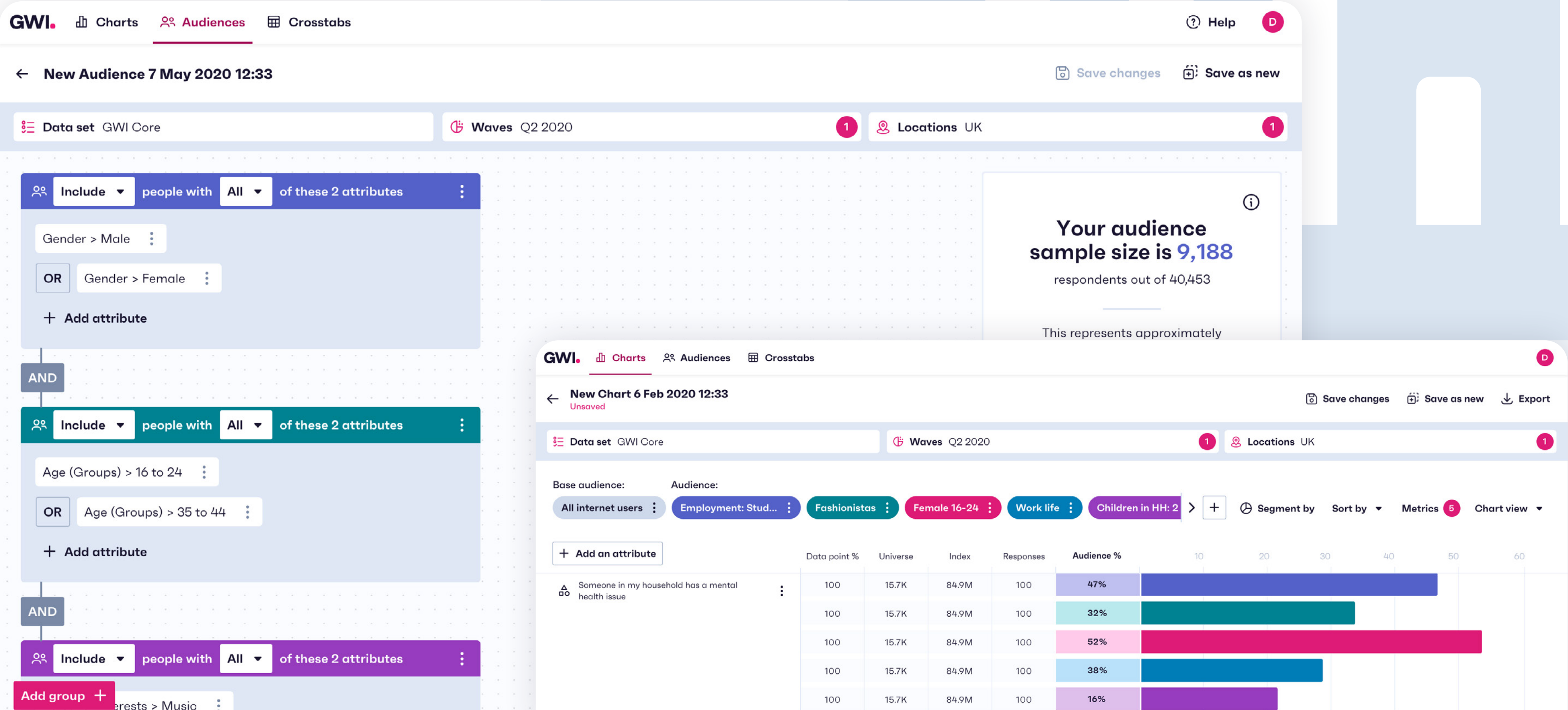
When reading this report, please note that we use a mixture of data from our ongoing global quarterly research and GWI Zeitgeist, a monthly recontact study of Core that we carry out in the following 12 markets: Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, Singapore, the UK, and USA.

Throughout this piece, 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.

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

Crisis fatigue is an issue

Ongoing bad news in the media has started to take its toll on consumers' collective headspace, and as a result, we can see signs of crisis fatigue setting in. While the climate emergency is important to Gen Z, there are other immediate issues that are impacting them more right now, so we're likely to see more prioritization in 2023.

They're nostalgic for Y2K

Gen Z are bringing back 90s and early 00s fashion trends and listening to the era's tunes. This isn't just about liking glitter details and baggy jeans; it's about the whole vibe. Many feel that the era represents a carefree time which was about having fun, and the stresses of today have led the more anxious-prone Gen Z to look back rather than forward, finding comfort in the nostalgia of Y2K.

The TikTok takeover continues

TikTok is a big part of social media's growth and is the fastest-rising platform for Gen Z outside China. One of the big pulls is the ability to get real views or opinions from real people, making the content more relatable. But BeReal is the new kid on the block, and it's piquing Gen Z's interest. Brands are just starting to explore how they could engage with the app, and it'll be something to look out for more in 2023.

Speaking Gen Z's language

Memes are a big part of how Gen Z communicate and how they spend their time online. They're not just something they look to for entertainment. Among Gen Z who use them, a large proportion say they use memes to process emotions and express ideas they'd struggle to communicate. For brands looking to engage with Gen Z online, a relatable meme could be the way to go when used correctly.

Social: the one-stop-shop

Social has become the top source of brand discovery and product research for Gen Z, beating out search engines. Part of this shift is the need to get more recommendations and ideas from real people before taking the plunge on a purchase, with 3 in 10 Gen Z saying they use social media as a place of inspiration. User-generated content is a key way brands can get involved here - showcasing their products with real people.

01

Getting to know Gen Z

Where Gen Z are today

While younger Gen Z are still studying for exams or at the first stage in their career, others have reached their mid 20s and are getting to grips with other stages of life like marriage and even parenthood.

As many Gen Z are in education or at an earlier stage in their career, it's important to remember that their spending power has not yet peaked - in fact, a significant portion of Gen Z currently fall into the lower income bracket. But, that proportion is likely to decrease over time, as they grow older and advance in their careers.

Despite the "lazy" **stereotypes** that Gen Z are often labeled with, they're a money-driven and ambitious group, and are 29% more likely to describe themselves as these things than older generations. They're taking a **new approach** to work than others have before them, and employers will need to keep up.

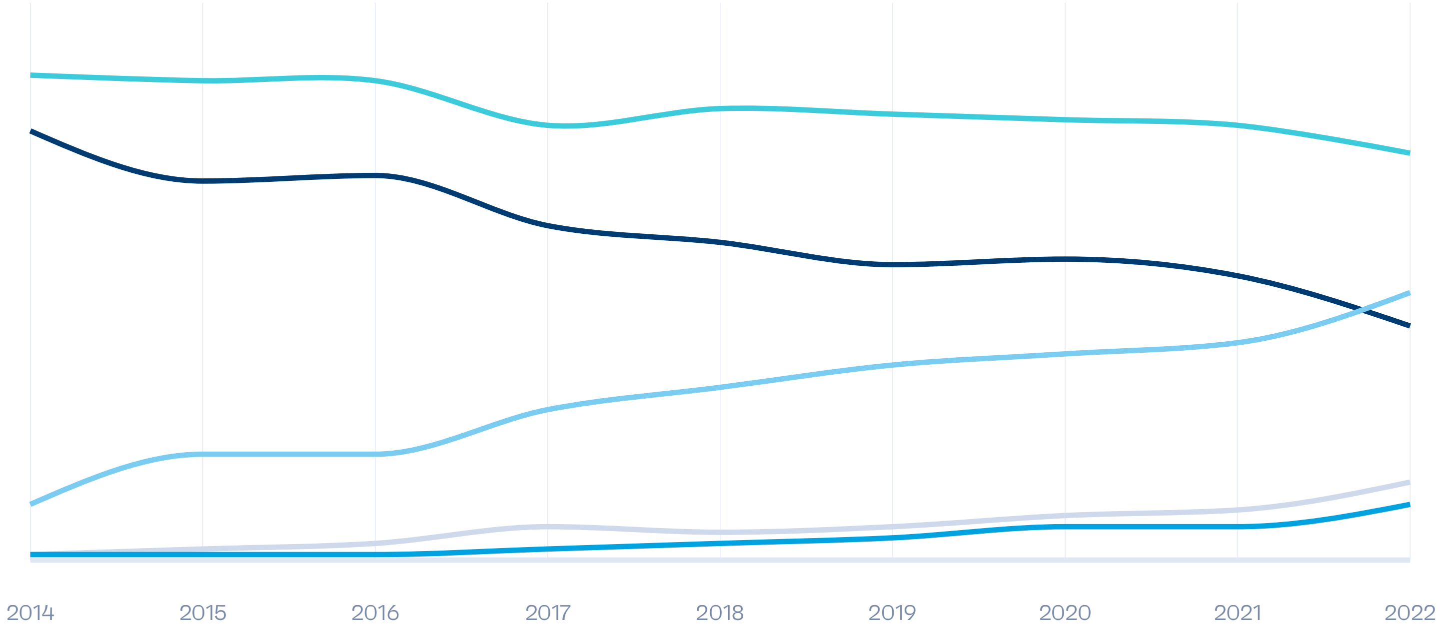
But it's been a difficult few years for everyone, and things have likely hit Gen Z harder than other generations. Many faced disruptions to their education, while others entered the working world during a global pandemic, and as a result many Gen Z are already feeling pretty **burned out**.

To make matters worse, 2022 was hit with a cost of living crisis, and talk of a **recession** in some global markets continues to swirl. Again, these issues impact everyone, but for a generation so young and still at the beginning of their career, they're likely to impact Gen Z more.

Gen Z are making their mark on the world

% of Gen Z who are the following

%	2014	2015	2016	2017	2018	2019	2020	2021	2022
Single	87	86	86	78	81	80	79	78	73
Student	77	68	69	60	57	53	54	51	42
Full/part-time or self-employed	10	19	19	27	31	35	37	39	48
Have 1 or more children	1	2	3	6	5	6	8	9	14
Married	1	1	1	2	3	4	6	6	10



GWI Core 2014-2022 (Averages of waves conducted between Q1 2014-Q3 2022) 739,853 Gen Z born between 1997-2006

How Gen Z are navigating uncertainty

Many Gen Z are feeling a little jaded as they walk into 2023, and the cost of living crisis is not making things any easier. A number of Gen Z saw 2022 as an **opportunity** to make up for lost time, and do the things that they missed out on, however inflation may have scuppered these plans for some.

For Gen Z, their attitudes toward the world around them have taken a hit since 2021, with a 9% drop in the number who are interested in other countries or cultures, and an 8% drop in the number who would like to explore the world. This might partly be down to people becoming more inward-facing due to financial or economic uncertainty, focusing more on themselves, their own situations, and their immediate circle. Gen Z's fastest-falling character trait YOY is adventurous (-5%), which could signal a need for **more stability** at the moment.

That said, for Gen Z overall financial confidence is still pretty high. Some world regions are feeling the hit of the cost of living crisis more acutely than others, so not everyone will be cutting back or re-prioritizing in the same way. For example, financial confidence is falling fastest YOY in Europe – likely due to the impact of the Ukraine war – and North America, while regions like APAC and LatAm look steady.

So it's not all doom and gloom. For Gen Z, prioritization will be key in 2023, and this could take shape in many ways, from what Gen Z chooses to buy to where they want to focus their time and energy.

Financial confidence isn't felt equally across the globe

% of Gen Z who think their personal finances will get better in the next 6 months

GWI Core Q3 2021-Q3 2022 277,606 Gen Z born between 1997-2006

02

The Gen Z lifestyle

A case of crisis fatigue

The climate emergency is important to Gen Z and underpins how many live their lives, but the last couple of years have started to take their toll on consumers' collective headspace. The past few years have hit everyone with bad news - Covid, the war in Ukraine, and the cost of living crisis, to name just a few.

Off the back of this, we can see signs of **"crisis fatigue"** setting in, where after prolonged exposure to stressors people start to switch off. Gen Z appears to be feeling **jaded** in their efforts to battle climate change with their interest in environmental issues ticking downward. Meanwhile, interest in news and current affairs and the number who like to know what's going on in the world has also decreased by 7% in the past year.

Gen Z are starting to switch off

3

% of Gen Z who feel the following

%	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022
I like to know what is going on in the world	47	47	46	45	44	44	43
I always try to recycle	33	34	34	34	33	33	32
I'm interested in environmental issues	33	34	34	33	32	32	30
I'm interested in news/current affairs	36	35	36	34	35	33	33

GWI Core Q1 2021-Q3 2022 367,096 Gen Z born between 1997-2006

This doesn't mean Gen Z doesn't care though – 45% say helping the environment is important. It's more a case of mental bandwidth and prioritization, and it's something we're likely to see more of in 2023. Right now, there are more things that impact them and their immediate circle, for example the harsh realities of paying bills and job security in the middle of a cost of living crisis.

In our research, we generally see that Gen Z expect more action from brands as they put more onus on bigger corporations rather than individual action. So, now's really the time for brands to listen, and dial back on making noise around climate change unless they can demonstrate a clear impact in what they're doing. Media outlets have a place too, as Gen Z are limiting their amount of news intake, journalists need to focus on more **solutions-driven** news and report on what's working well to address various issues.

Buy now, save the planet later. Our Connecting the dots report looks at the prioritization problem with sustainability

Download report

Gen Z's interest in environmental issues has decreased 11% year-on-year

Beating the blues

Mental health strain is felt most heavily by this young generation. As we've mentioned before, Gen Z have had a lot to deal with at key life stages and unfortunately for some it's taken a toll.

Globally, they're more likely than other generations to report having a mental health condition and almost 3 in 10 say they're prone to anxiety, a higher proportion than any other age group. Rates of anxiety and stress are also rising. In the US alone, the number of Gen Z saying they experience stress/anxiety regularly has increased by 25% since the start of the pandemic. Despite struggling the most, Gen Z are also the least comfortable opening up about how they feel compared to older generations.

Their increased anxiety levels are partly influenced by social media. Around a third of Gen Z worry they're spending too much time on social media and around a fifth say it causes them anxiety – 25% more likely than other generations to say this. A combination of heavy representation of **unrealistic body images**, as well as more **online abuse** has led to female Gen Z feeling this more acutely than male Gen Z – they're 16% more likely than their male counterparts to say social media causes them anxiety. This is likely why they've been calling for more authenticity online, and why platforms like BeReal and TikTok have been such a hit with them.

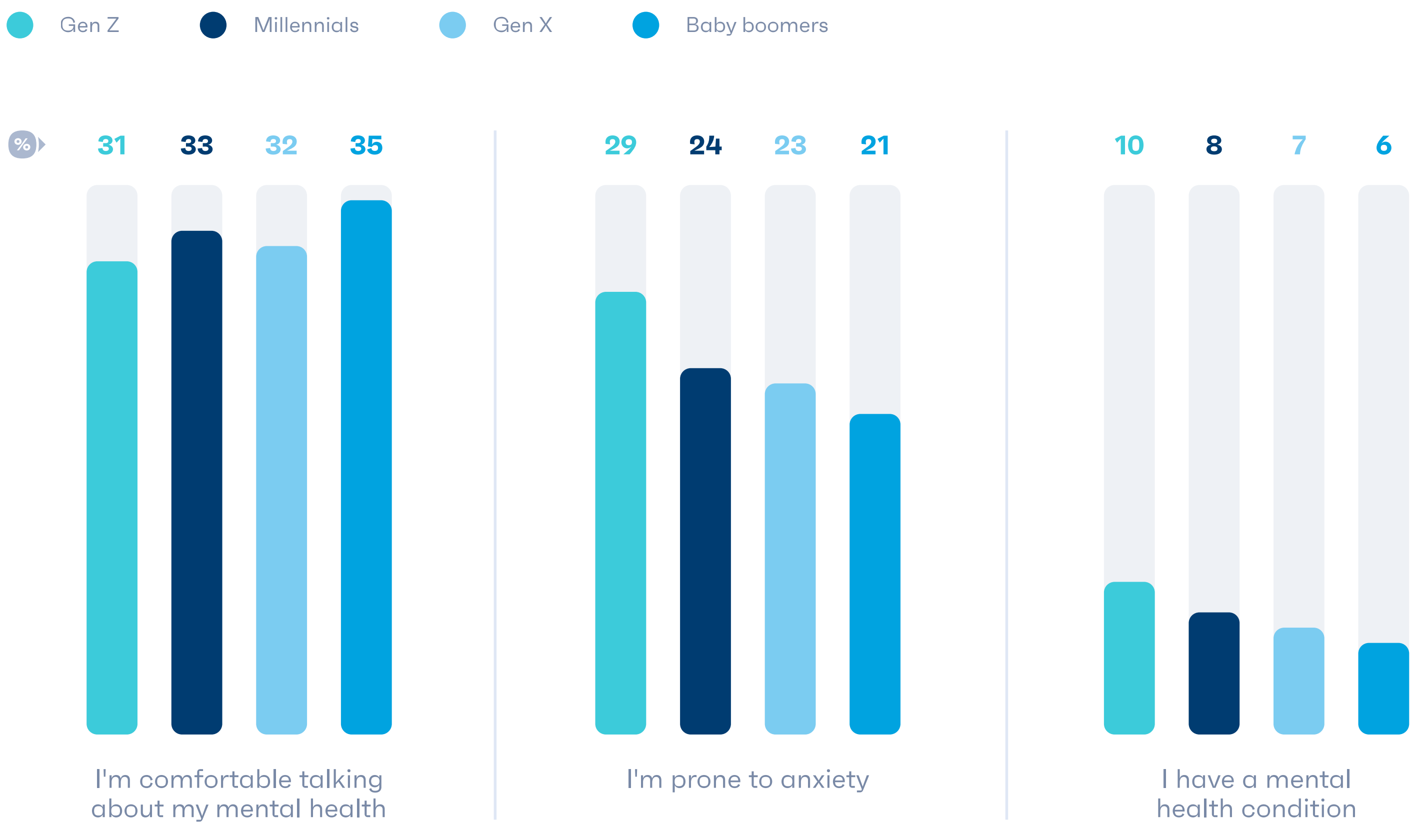
There are other issues at play here too. With the cost of living further increasing, many Gen Z aren't able to **afford** the help they need either. This makes them a key audience for health and wellbeing brands to connect with, but it'll be important for brands to communicate in their marketing the importance of opening up to get the help they need. Brands also need to be mindful in how they do this though, authenticity is essential, as well as maintaining a human approach.

Fitness apparel brand Gymshark's **Deload** campaign is a great example here. The company partnered with two mental health charities to deliver advice, support, and entertainment to help boost people's mental health.

29%
of Gen Z say they're prone to anxiety

Gen Z need help opening up

% who feel the following describes them



GWI Core Q3 2022 246,761 internet users aged 16-64

Making waves in the workplace

As Gen Z establish themselves in the workplace, they're making a pretty big impact. While many of this group joined the workforce during a crisis, the pandemic changed how many work today as well as their attitudes toward work. So, while rigid working routines may have felt normal to older generations, Gen Z are **breaking the mold**.

The internet is littered with **stereotypes** around Gen Z being lazy or not wanting to work. But the truth is this group are simply pushing back on the often damaging **"hustle culture"** that's long existed. Aspects of work that have been seen as "nice-to-haves" in the past are now expected, such as work from home flexibility and the ability to have a better **work-life balance**. This group are willing to put the work in for the right company - they're ahead of other generations for saying they describe themselves as ambitious, money-driven, and career-oriented. But Gen Z expect more from their employer in return, and they're more likely to leave a job which doesn't **meet their needs**, and they feel more comfortable saying "no" in the workplace.

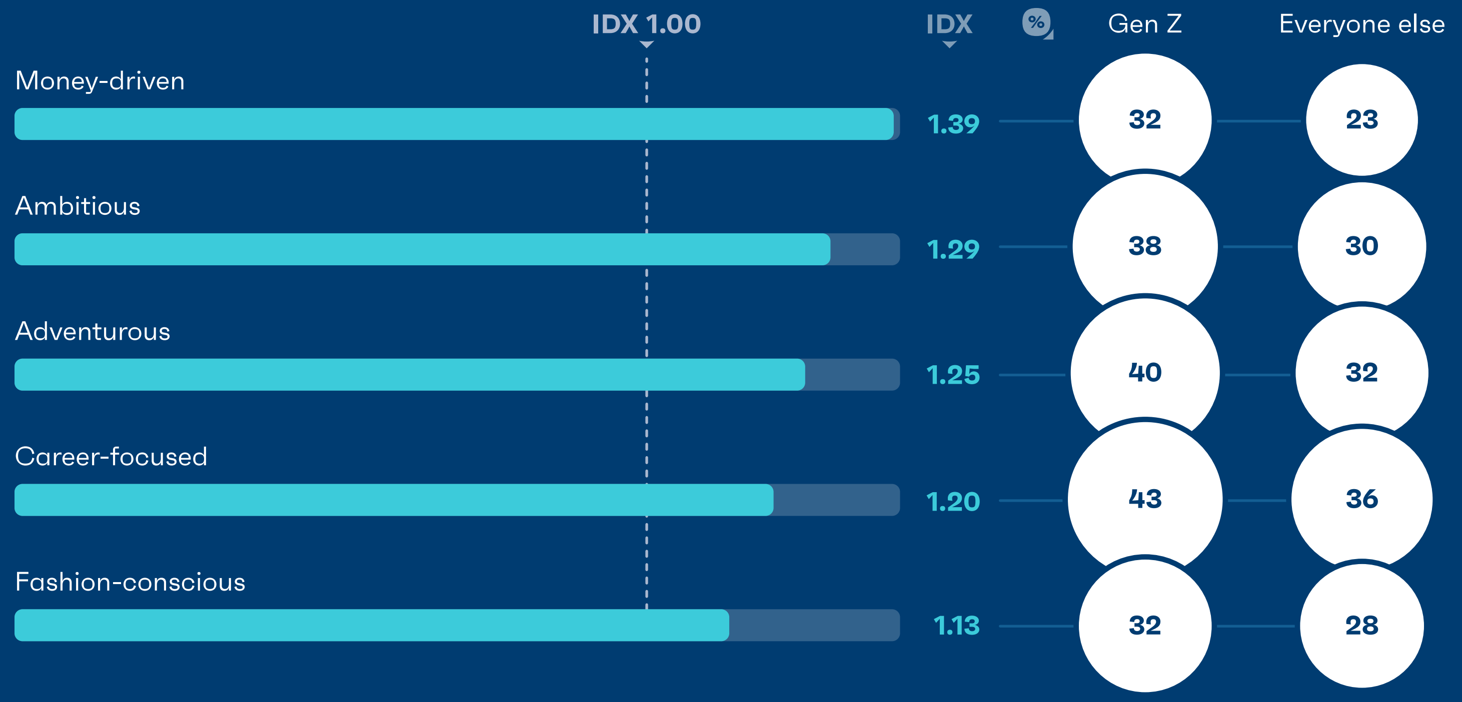
Fair pay and flexibility, in some shape or form, have come to be expected at this point. If employers are to attract and connect with Gen Z in the workplace, they need to give them opportunities to learn. This generation are looking to grab all opportunities with both hands, and are 37% more likely to want the ability to mentor/train others and 33% more likely to want opportunities to work with clients or customers than older generations. It's important that the right support is put in place – this group doesn't want to sacrifice their mental wellness at the expense of learning opportunities.

Doing meaningful work is also important to over 8 in 10 Gen Z, so this is something companies should build into their roles. Automation company Siemens is creating a real focus on ensuring employees are doing **work that matters** to the outside world, helping Gen Z feel like they're doing something that will make a difference.

Gen Z will soon overtake millennials as the **largest generation**, and as more enter the workforce, employers will need to step up and listen.

Ambition underpins this group

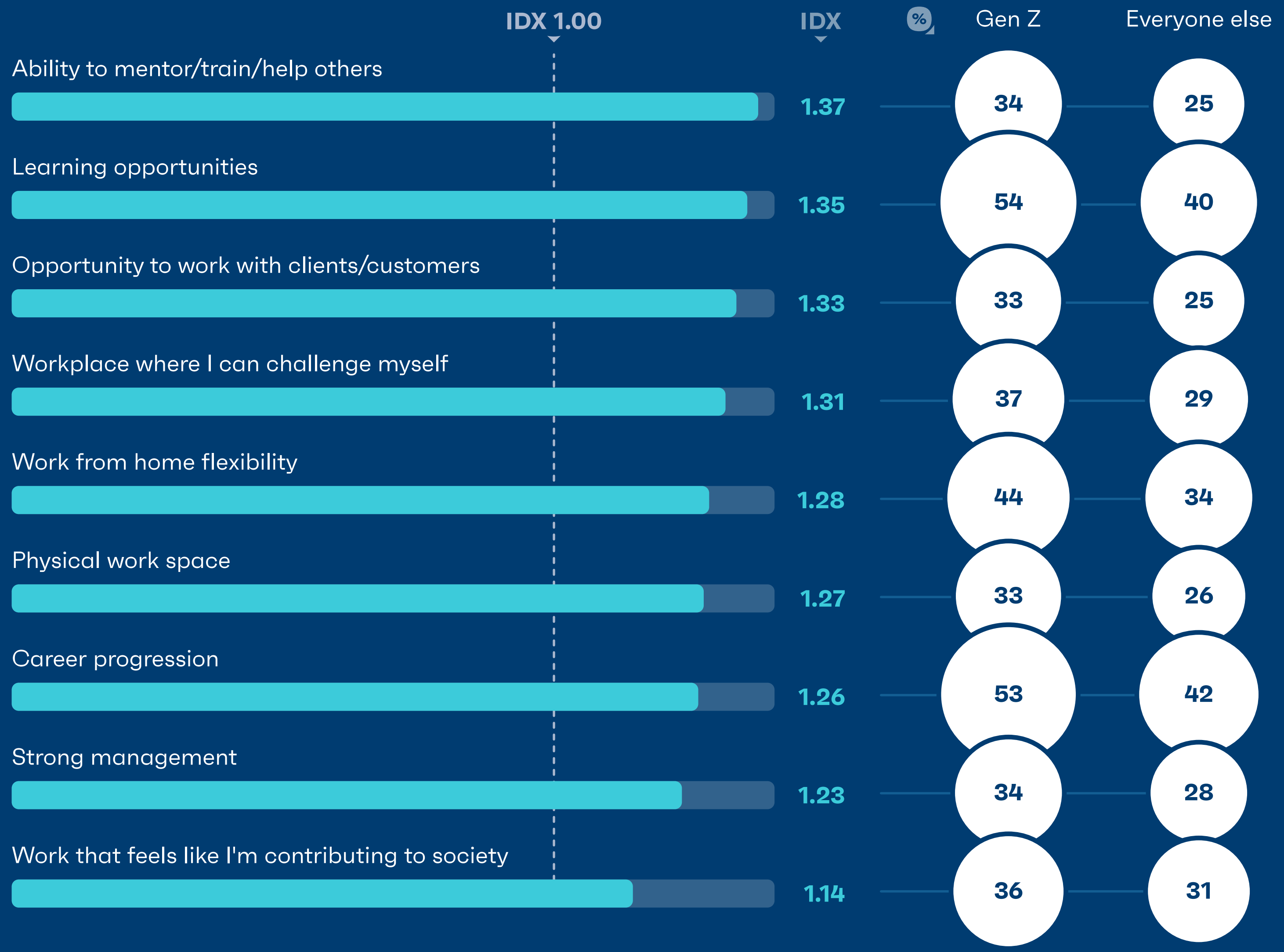
% who feel the following describes them (sorted by over-index against everyone else)



GWI Core Q3 2022 57,568 Gen Z internet users aged 16-25 and 189,193 internet users aged 26-64

Gen Z value learning opportunities

% who say the following are most important to them in a workplace (sorted by over-index against everyone else)



GWI Zeitgeist July 2022 1,602 internet users who aren't retired aged 16-25 and 12,813 internet users who aren't retired aged 26-64

A financial health check

As the youngest generation in the workforce, Gen Z are earning less and are most likely to have a salary that fluctuates from month to month, making it more difficult to budget and build up a strong savings cushion. That said, 63% of this group say they want to save up more money over the next 3 months – ahead of other generations.

This presents a key opportunity for banks and fintech companies to double down on building financial knowledge and comfort among this group. In fact, 73% think that banks should provide support for customers' financial wellbeing, but only 55% say their bank does. They stand out for wanting their bank to support them - on how to budget, advice on better spending habits, and ways to save for retirement. Even though they're a long way off retirement, many are keen to start planning for their financial security in the future.

Right now, they're most likely to trust friends and family for advice but they'd like to lean more on an expert source. This provides an opportunity for banks to distribute advice to their customers more, potentially through **blog posts** or pages on their website. As Gen Z are an entertainment-driven generation, things like how-to videos, bite-size educational videos, and other expert-driven content are likely to resonate. Banks and fintech companies could lean on finfluencers too - who've been making waves on **platforms like TikTok** and are likely to capture the attention of Gen Z.

Some of the ways banks can support their younger customers are through applying automatic saving schemes, offering online courses, or even offering 1-2-1 sessions with a financial advisor. For Gen Z, it's not just about getting a good service, it's about seeing the **human side** of their bank too.

With consumers feeling the pinch, is this fintech's time to shine?

Download report

Gen Z are looking for more financial guidance

% of Gen Z who would like their bank to support with the following

GWI Zeitgeist October 2022

1,984 Gen Z internet users aged 16-25 and 13,594 internet users aged 26-64 in 12 markets

So what can banks do to provide support?

% of Gen Z who would like their bank to provide help in the following ways

GWI Zeitgeist October 2022 1,984 Gen Z aged 16-25 in 12 markets

03

Entertainment and media

The streaming generation

For the first time in 2021, Gen Z globally spent longer streaming TV than watching broadcast TV, but it was only by a minute. In 2022, this gap widened even further, with Gen Z spending 5 minutes more per day streaming on average, and it seems that it's officially becoming the main way they consume TV.

In terms of what they're watching, Gen Z's favorite genre is entertainment/variety, which has knocked movies off the top spot. Part of this is likely due to this generation becoming used to digesting **shorter forms of content** - think Instagram Reels, TikTok, and YouTube Shorts.

This is another reason why the visual media space has become so competitive - linear and streaming TV providers not only have to compete with each other, but also video viewing on other online platforms. This means providers will need to work even harder to capture Gen Z's attention.

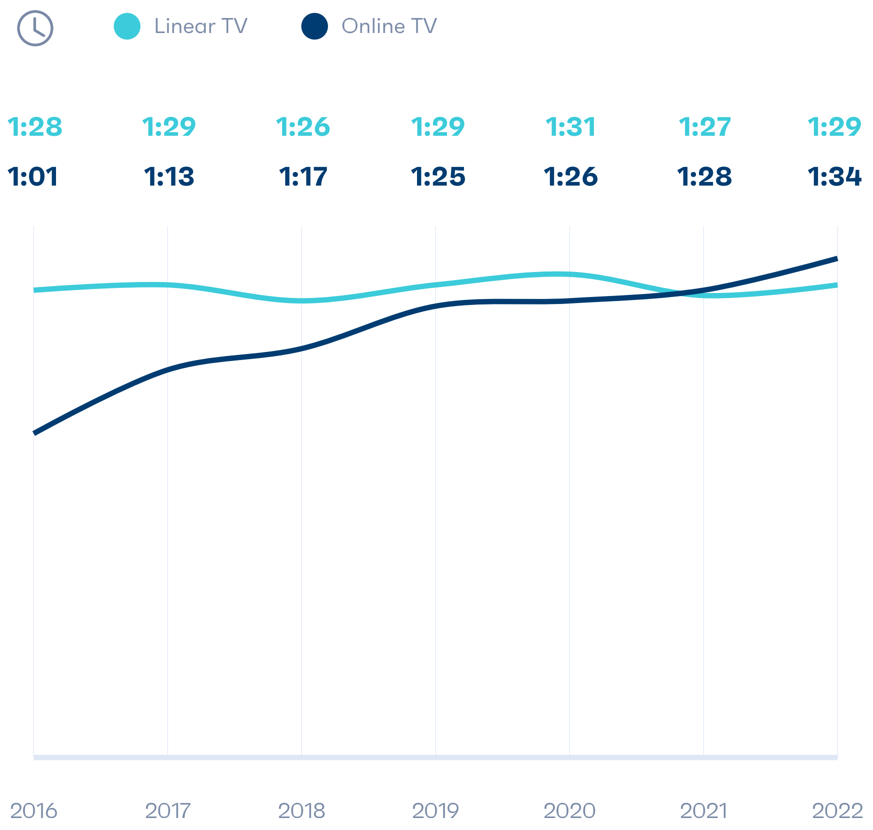
Price and the cost of living crisis are also adding to the pressure. Many are looking to make cuts where they can so any TV subscription service that doesn't deliver in terms of content or is deemed too expensive is likely to be on the chopping block. Gen Z are a key audience for these services, but 37% are looking to cut back on the number they subscribe to.

Luckily for streaming services, there's a few solutions that are likely to keep Gen Z interested. 55% support the addition of an ad-supported tier on a TV streaming service if it would be cheaper, and only 20% of this group say they try to avoid all types of advertising. In 2022, Netflix and Disney+ **joined** HBO Max and Hulu by offering hybrid ad-supported tiers, and we could see other platforms join the club soon. This is likely to appeal to anyone who's more cost-conscious but doesn't want to give up on their favorite service.

But price isn't the be-all and end-all. Content relevant to their interests, original content, new content regularly added, and a large amount of content are most important for this audience when it comes to paying for a streaming service. For brands looking to keep this group engaged, content really is king.

Streaming beats out broadcast

Gen Z's average time spent per day on the following (h:mm)



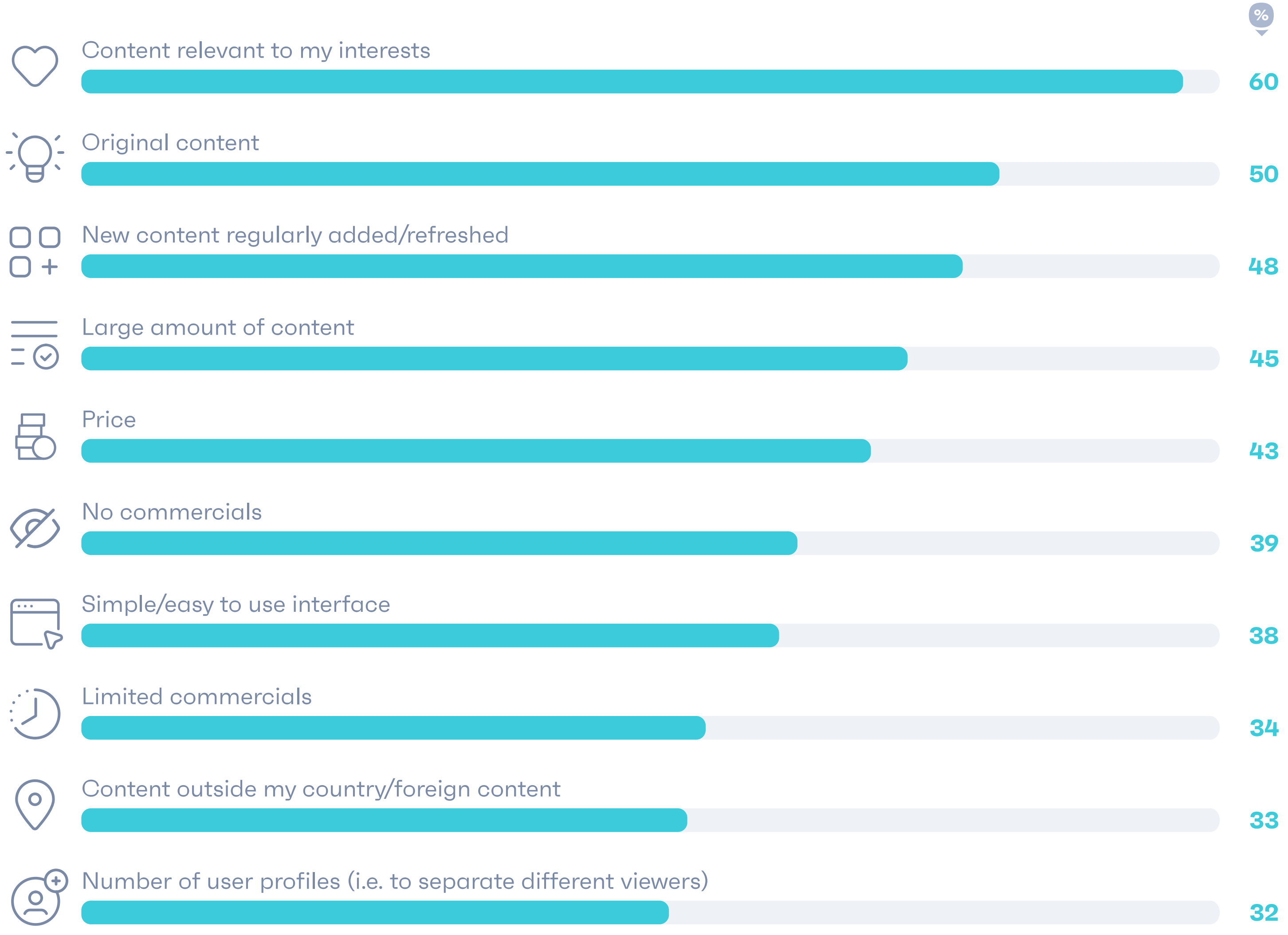
GWI Core 2016-2022 (Averages of waves conducted between Q1 2016-Q3 2022)

502,718 Gen Z born between 1997-2006

Content matters more than price

7

% of Gen Z who feel the following are important when paying for a film/TV streaming service



GWI Zeitgeist July 2022

1,602 Gen Z aged 16-25 in 12 markets

Gaming for connection

Gaming is big for this generation - almost 9 in 10 Gen Z are gamers on any device with the most popular device to play games being smartphones.

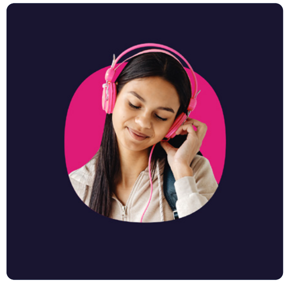
There's also a key difference in why Gen Z choose to game compared to other generations and it lies in interaction with others. For Gen Z, their most distinctive reason for gaming is to socialize with friends, whereas for older generations it's to relax or unwind.

Gen Z's preference for the interactive side of gaming has a knock-on impact on the platforms they use. For example, the number of Gen Z gamers who use Discord, an instant messaging social platform often used by gamers, has grown 24% year-on-year.

It's Gen Z's desire for online socialization that makes them a key audience for the metaverse. Almost half of Gen Z say they're interested in participating in a metaverse - more than any other generation. Among Gen Z who are interested in participating in a metaverse, just over half say they'd be keen on playing games and watching TV/movies, while just under half say they'd like to meet up with friends/family or meet new people.

As the metaverse develops and brands continue to get involved, they need to ensure that an environment is built where all users feel welcome. At present, metaverse early adopters don't **represent** wider populations, so businesses will need to ensure they build inclusive settings and products, ensuring that the metaverse is a safe and fun space for all.

Find out how the US entertainment scene is different



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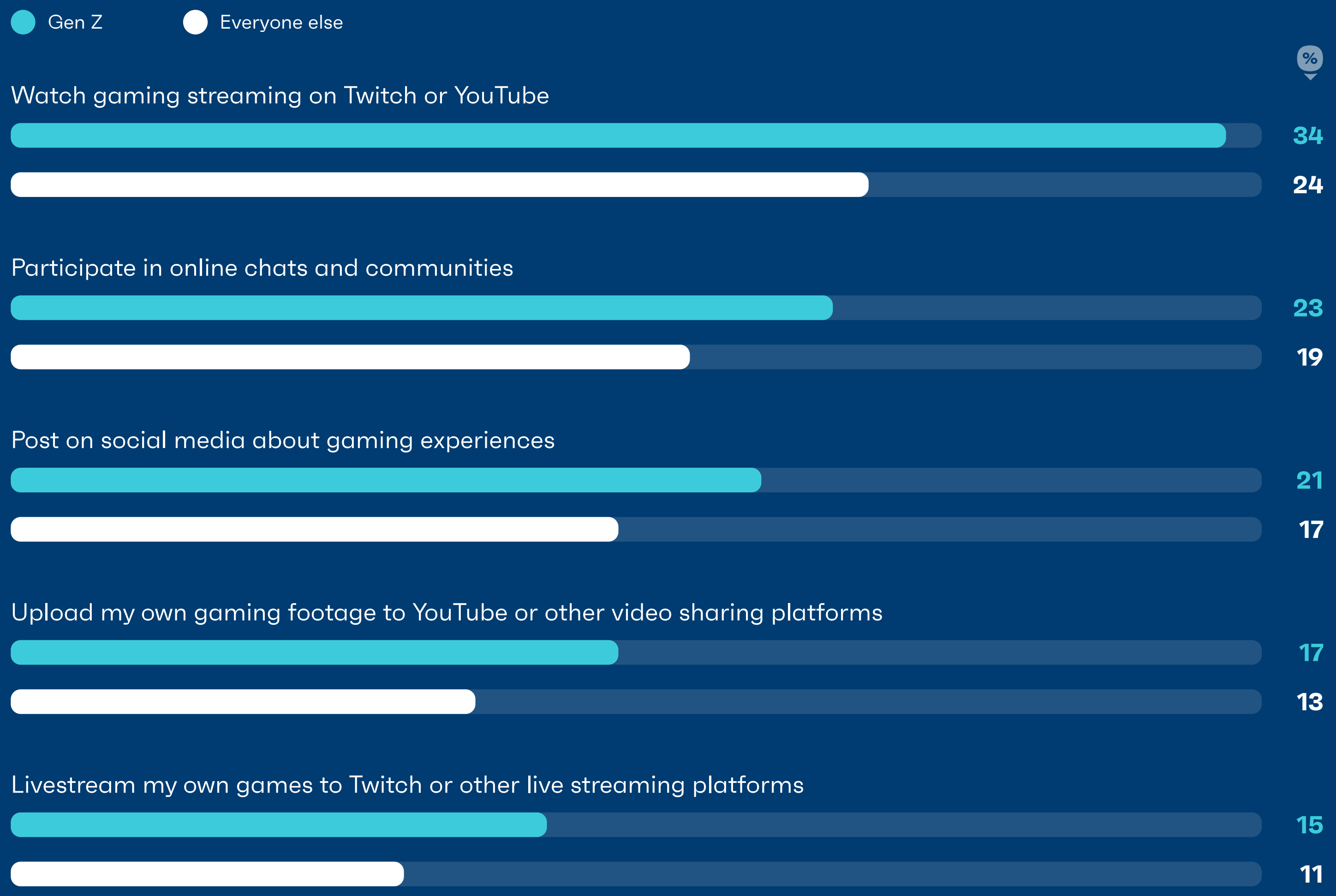
Social gaming is key for Gen Z

% of gamers who say they do the following

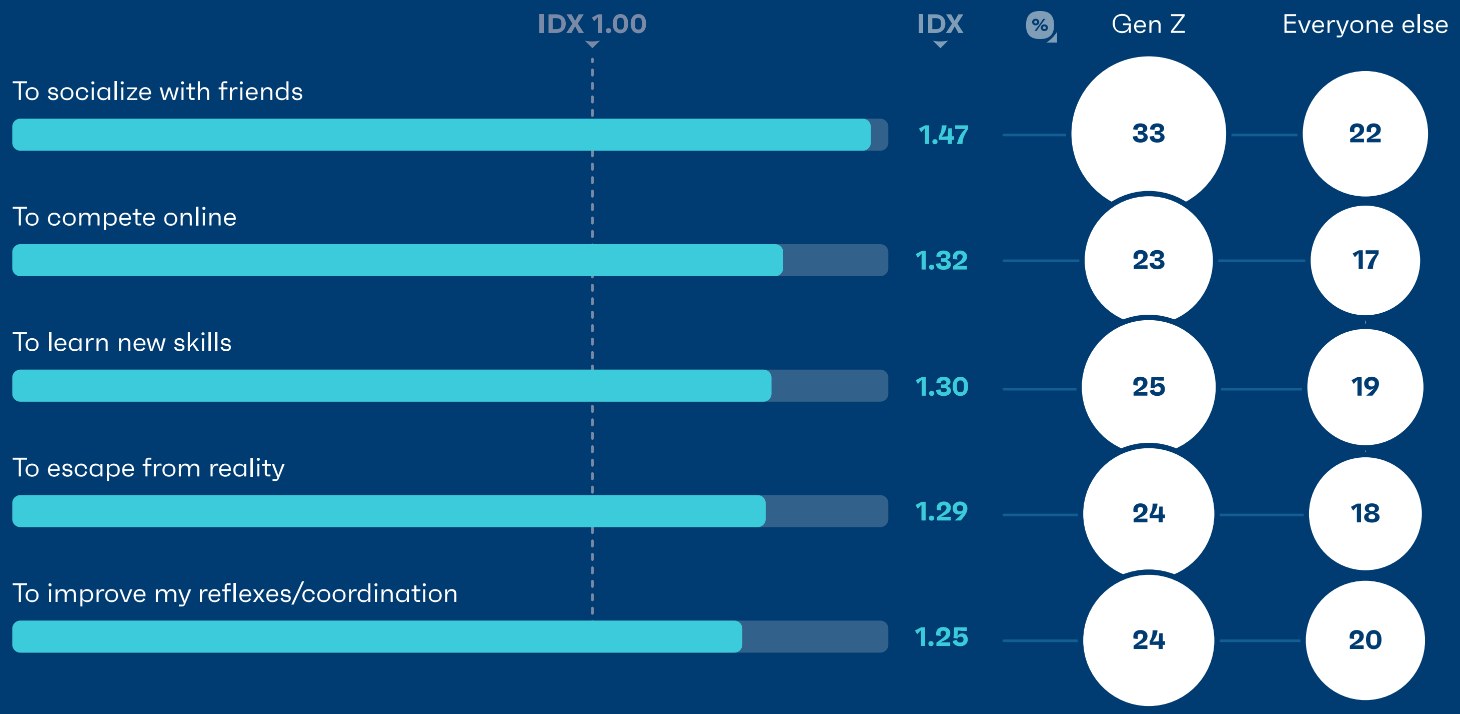


GWI Gaming Q2 2022 5,106 Gen Z gamers aged 16-25 and 26,520 non-Gen Z gamers aged 26-64 in 18 markets

8

Gen Z favor the interactive side of gaming

% of gamers who say the following are their main reasons for gaming (sorted by over-index against everyone else)



GWI Gaming Q2 2022 5,106 Gen Z gamers aged 16-25 and 26,520 non-Gen Z gamers aged 26-64 in 18 markets

Tuning into nostalgia

While older generations generally tune into the music of the decade they grew up in, Gen Z are breaking the mold. Their top genre is hip-hop or rap music, closely followed by 90s music, which for many would have been released before they were born.

But, what makes this generation have a preference for listening to music that they didn't grow up with? The answer is likely due to nostalgia. As Gen Z face various struggles in their late teens and early adulthood, they're likely searching for comfort. As a **coping mechanism**, the generation has latched onto a simpler time, before social media existed.

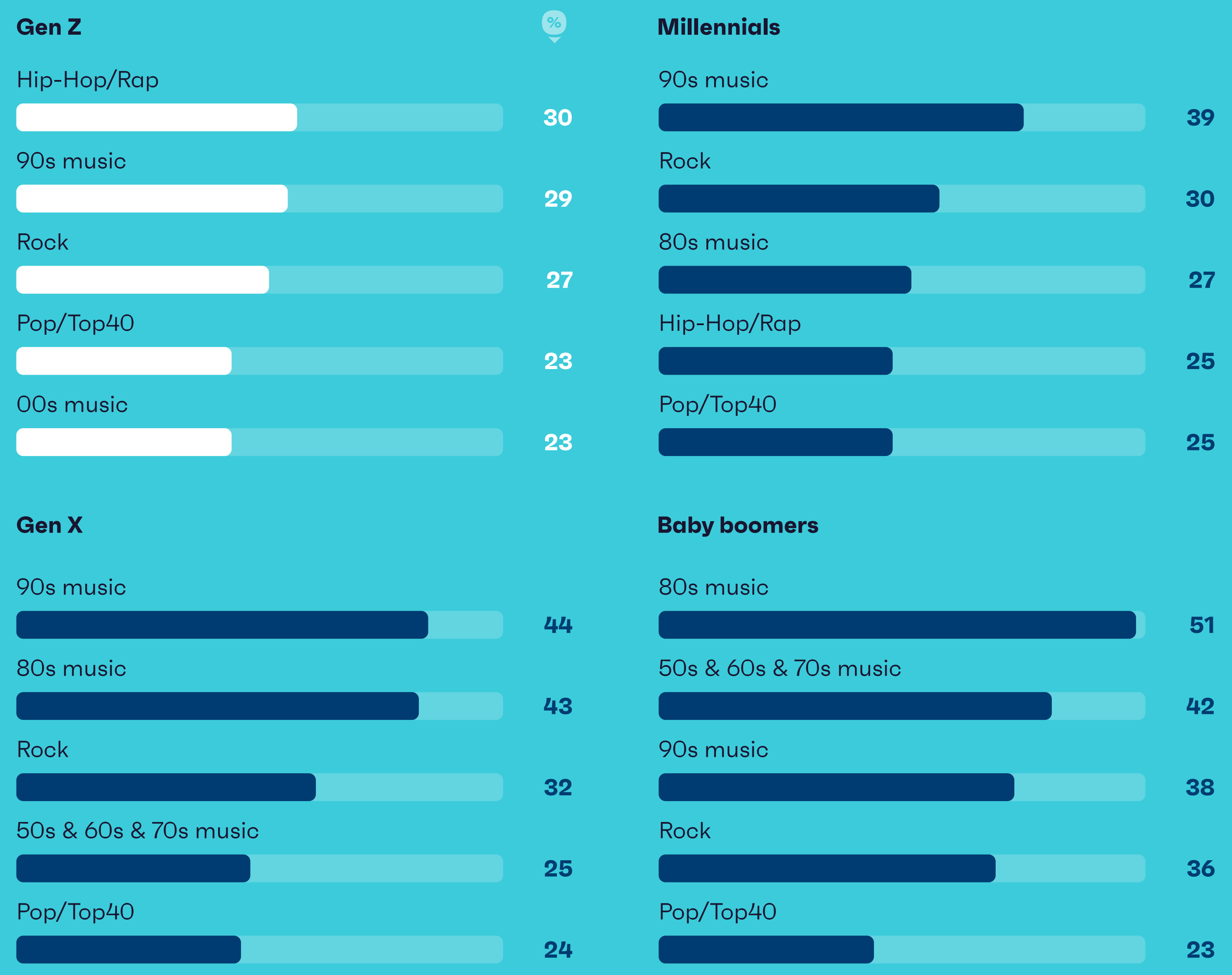
We can see this in their motivations to listen to music too. The most distinctive reason Gen Z listen to music is to escape from reality, with 42% saying this - 20% more likely than other generations. Emotion is another factor Gen Z thinks about when listening to music, with 54% saying they listen to music to lift their mood. This is something that Spotify has really leaned into, creating playlists to match different moods, and it's **gaining momentum** as music genres become harder to define.

That said, Gen Z aren't likely to tune into a genre just because it's popular. For many, part of the fun is the process of finding new music, artists, or bands, and discovering them before they're popular, making Gen Z a key audience for music discovery tools.

Gen Z prefer 90s nostalgia to 00s tunes

9

% who like listening to the following music genres



GWI Core Q3 2022 243,124 internet users aged 16-64

Bringing Y2K back

Gen Z's affinity with the 90s isn't limited to their musical tastes, they're actually a pretty nostalgic generation in general. 17% say they'd prefer to think about the past rather than the future – 19% more likely than other generations.

With 54% of Gen Z liking the style of vintage clothes, they've also brought back 90s and early 00s **fashion trends** like glitter details, claw clips, and halter tops. The generation have also declared the beloved millennial **skinny jeans "dead"** and are sporting more 90s low-rise styles instead.

Brands have also worked hard to keep up with the demand for throwbacks. Everlane, for example, began selling a "puddle pant", a style of pants which are **described as** "the perfect antidote to skinny jeans". The style is clearly popular with Everlane having a **waitlist** as long as 6,000 people trying to get their hands on a pair.

The Y2K fashion trends aren't going anywhere either. Google searches for **"Y2K"** are up and have been on the rise ever since 2021, while fashion magazine Vogue's **2023 trends forecast** says 90s and 00s nostalgia will remain.

Many may remember Y2K trends as a time when **super-skinny bodies** were also "in", but Gen Z are bringing the fashions back with more **body positivity**. So while Gen Z are nostalgic for the trends of the era, they're keen to leave **90s beauty standards** behind.

For Gen Z, Y2K isn't just about the style though, it's a whole vibe. Many feel that the era represents a **carefree time** that was about having fun, and with the stressful reality we've experienced in the last few years, it's no wonder Gen Z are **nostalgic** for a simpler time.

04

Social media

A TikTok takeover

Time spent online for Gen Z peaked in early 2020. This is likely due to numerous lockdowns throughout the world, but it's been dropping ever since then, with time spent online in Q3 2022 being the lowest it's been since Q4 2016.

That said, the percentage of Gen Z's online time being spent on social media is at an all-time high of 41%, having only reached this height once before in Q4 2019. This is likely because social media is being used for different reasons now - it's no longer just about following friends, family, or even influencers.

Almost 3 in 10 Gen Z use social media to find inspiration for things, and they're 11% more likely to do this than any other generation. One of their top reasons for using social media is to fill their spare time and find content - whether that's articles, advice, or memes. Social is also becoming a **big way to shop**, with Gen Z's top brand discovery tool being ads seen on social media.

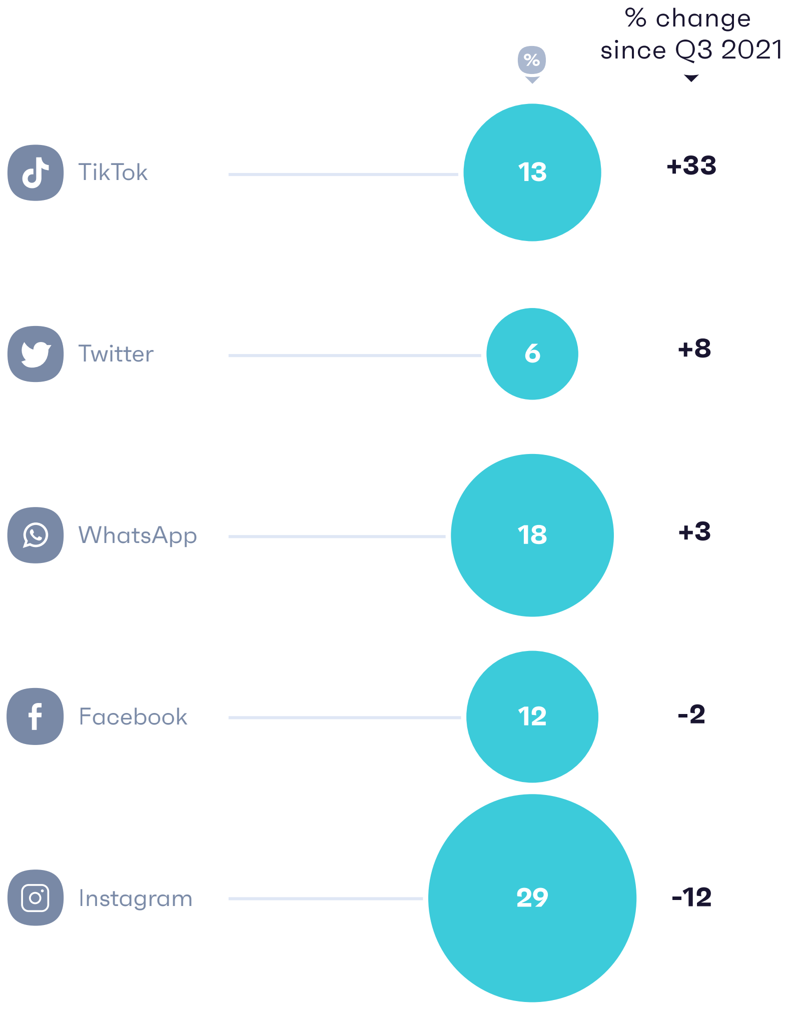
While Instagram is their most-used platform outside China overall, TikTok is a big part of social media's growth. Gen Z's use of TikTok outside of China has grown the most of all the social media platforms we track, rising an impressive 37% since Q4 2020. With 83% of Gen Z TikTok users saying they use the platform for entertaining/funny content, the app is clearly the go-to place for some light-hearted relief.

One of the big pulls of apps like TikTok is also the ability to get real views or opinions from real people, making it more relatable. As a result, Gen Z are often going to TikTok before Google for advice about anything from **finances**, **travel**, or **beauty trends**. According to research by **Google**, nearly half of young people look to TikTok or Instagram instead of Google Maps or Search for answers. It's a big shift in behavior, and something brands should be mindful of in 2023.

TikTok continues to grow in popularity

10

% of Gen Z social media users outside of China who say the following are their favorite (sorted by % change)



GWI Core Q3 2021 & Q3 2022

41,441 (Q3 2021) & 50,206 (Q3 2022) Gen Z social media users outside of China born between 1997-2006

Let's BeReal about social media

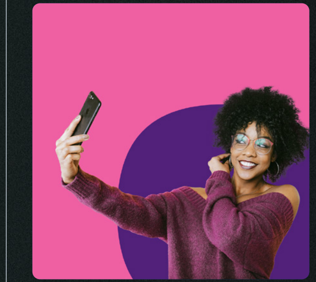
The concept of social media started out as a way to keep up with friends - think MySpace, Facebook, and Bebo. But now, it's more about the content, and as we've touched on before, Gen Z are going to social media platforms to get advice, research brands, and to find entertaining content.

BeReal, however, is changing the game and it's piquing Gen Z's interest. The app prompts users to take two pictures each day, one using the front camera and the other using the back one. The idea is to snap a picture of whatever they're doing at the time along with a selfie showing what they look like, and no filters are allowed. In our September Zeitgeist 2022 research, 52% of Gen Z in 3 markets said they've never heard of the app, but 34% said they're interested in using it, which points to further growth in the future.

While the news tends to focus more on the authentic side of BeReal, the top 3 reasons users give for engaging with it are because it's easy to use (34%), it's fun (31%), and their friends are on it (29%). So, a big string to BeReal's bow is the social aspect. The daily nature of the app allows them to keep up with their friends' activities, while **some feel** Instagram is more for posting about major life events, and TikTok is more for watching and browsing, rather than posting.

The future for brands is unclear at this point, but it could help them build communities with consumers - the most distinctive thing Gen Z want brands to do. Chipotle has already started making moves onto the app, having already **maxed out** its follower count. It all started with a post featuring a promo code where the first 100 people got a free entrée and all codes were gone in 30 minutes. The brand is clearly still **testing** the waters with BeReal, but it could give an idea about how future brand engagement might work.

Want to know about social media trends? Check out our social media trends report.



Download report

Memes: speaking Gen Z's language

For Gen Z, memes are a big part of how they communicate and how they spend their time online. When looking at why Gen Z uses social media, finding content like memes, sits within their top three motivations. If we take a closer look at what kinds of accounts Gen Z follow, entertainment, meme or parody accounts come second, only to be topped by family and friends. Memes are funny and relatable – something that we know resonates well with this young generation.

Their interest in memes does go a little deeper than this, though. Among Gen Z who use memes, around three quarters say it helps them process certain emotions and express ideas that they'd

73% of Gen Z say memes help them express ideas they would normally struggle to communicate

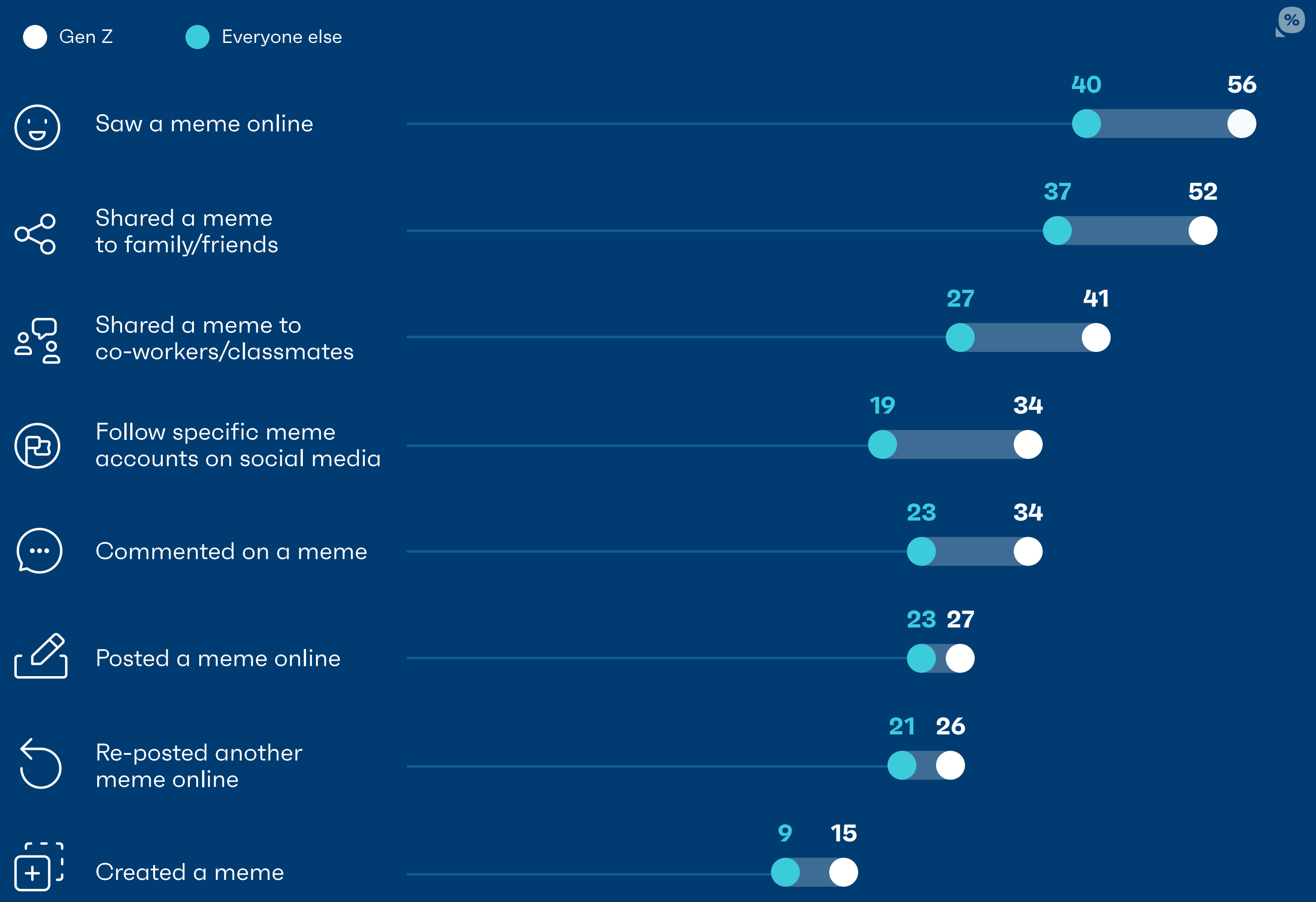
normally struggle to communicate - so it's not all about having a laugh. 73% say they've even started referring to memes in real life situations that occur offline, as a way to communicate their feelings or ideas. They're a kind of language in their own right.

For brands looking to engage with Gen Z online, using a relatable meme could be the way to go. Among Gen Z who use memes, 64% say they like it when a company uses them for marketing purposes. It makes sense too, as the most distinctive things Gen Z want brands to be are young, trendy, and funny. It's all about a relatable human side, rather than anything traditional or corporate. Netflix is a good example of a brand that uses **memes in their marketing** - they often use their own content to create new memes to post on their social pages. But it's not just brands who can get involved. US state agencies have started using memes. The Washington State Department of National Resources used a meme to educate people about what to do if they **encounter a bear**. It's a clever way of showing people the **human side** behind an organization.

Brands and companies should be aware though that meme trends change, as does what's funny or trending, so it's all about being on the pulse; a meme used at the wrong time could be seen as **cringey** and uncomfortable.

Gen Z are heavier users of memes compared to older generations

% who say they've done the following in the past week



GWI Zeitgeist September 2022 2,379 internet users aged 16-25 and 12,194 internet users aged 26-64 in 11 markets

Memes are a big part of how Gen Z communicate online

11

% of Gen Z who agree with the following

GWI Zeitgeist September 2022 2,145 internet users aged 16-25 who've done something meme related in the past week in 11 markets

05

Engaging with Gen Z

How do Gen Z stand out in their purchase journey?

Brand discovery

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

	%	IDX
Vlogs	16	1.31
Endorsements by celebrities or well-known individuals	19	1.30
Ads on music-streaming services	16	1.19
Ads/sponsored content on podcasts	13	1.16
Posts or reviews from expert bloggers	18	1.15

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 (blogs recorded in video form)	18	1.29
Micro-blogs (e.g. Twitter)	18	1.20
Online pinboards (e.g. Pinterest)	12	1.19
Video sites	26	1.16
Mobile apps	30	1.12

Online purchase drivers

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

	%	IDX
Click & Collect delivery	17	1.14
Lots of "likes" or good comments on social media	24	1.11
Exclusive content or services	16	1.10
Option to use "buy" button on a social network	14	1.09
Entry into competitions	14	1.07

Brand advocacy

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

	%	IDX
Access to exclusive content or services (e.g. music, videos, etc)	22	1.13
Love for the brand	35	1.09
When something enhances my online reputation/status	17	1.06
The feeling of taking part/being involved	24	1.06
When something is relevant to my friends' interests	22	1.06

GWI Core Q3 2022 57,568 Gen Z aged 16-25

Social is becoming a one-stop-shop in Gen Z's purchase journey

Gen Z differs from other generations in how they discover new brands and products, with their top way being social media, as opposed to search engines. This generation are also heading to social media for product research, whether it's through blogs, vlogs, online pinboards, or video sites.

Globally, social media beats out search when it comes to product research – and the number of Gen Z turning to social for this reason has jumped up by 35% since 2015. With 3 in 10 Gen Z also saying they use social media as a place for inspiration, it's becoming a **one-stop-shop** for their purchase journey. They want to be inspired, rather than simply informed, and social media platforms like TikTok fill this role nicely. Think of it as a mindset shift from "I know what I want to find/search for" to "I want to explore and find things I didn't even know I needed".

We touched on this before, but a big part of this shift is the need to get more recommendations and ideas from real people. This could be why a product getting lots of "likes" or good comments on social media is a key online purchase driver for Gen Z. It shows that real people are interested or have had good experiences; they're not just relying on an article which could have been sponsored by a particular brand.

For brands who haven't dipped their toe into user-generated content (UGC), this could be a good way to start. There's different ways to **use UGC**; for example creating challenges, using a unique hashtag, or using influencers. These are good ways to draw attention to a product, as well as create conversation around it.

Fabletics are a good example of brands using UGC to stir up interest in their products. They regularly share UGC from customers on their TikTok to show **real people wearing the clothes** they made - it helps build trust in potential customers as they're able to see how the clothes look on people like themselves.

Social media is the top source of brand discovery and product research for Gen Z

Want to know more about how consumers are finding products in 2023?

Download report

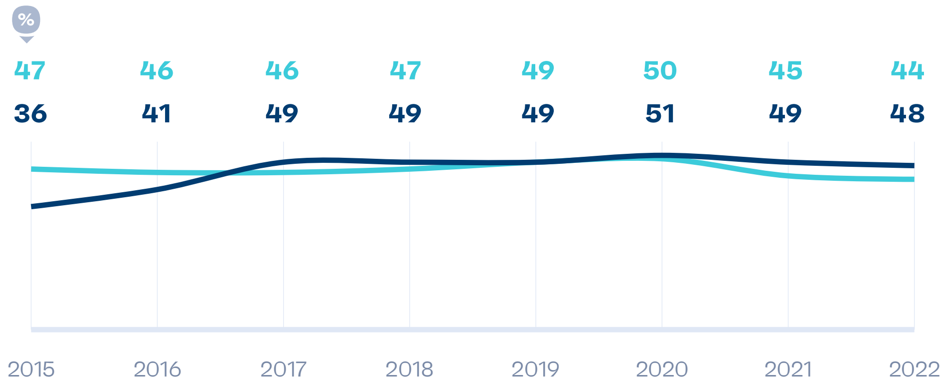
13

Social has overtaken search engines for product research

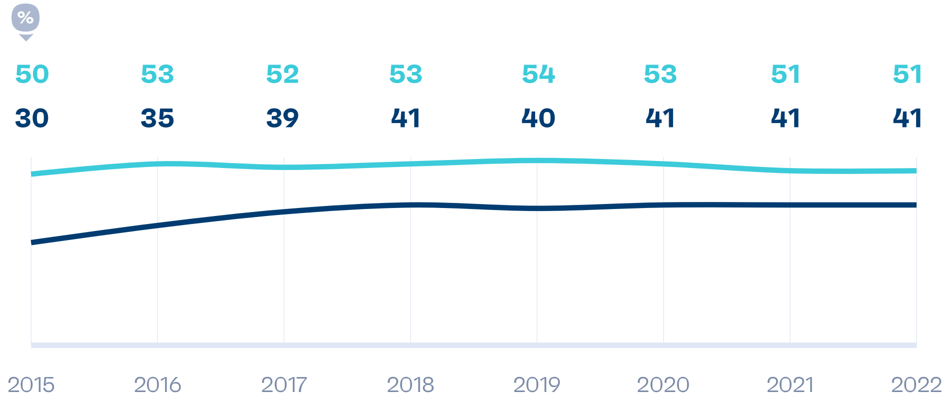
% who say they mainly use the following when looking for more brand or product information

Search engines | Social networks

Gen Z



Everyone else



GWI Core 2015-2022 (Averages of waves conducted between Q1 2015-Q3 2022)

737,081 internet users born between 1997-2006 and 3,362,220 internet users born between 1963-1996

Revenge purchases are on the agenda

With the cost of living crisis, many are choosing where to save and where to spend. Some are still making sure they **treat themselves**, whether that's something small or saving up to go on a trip.

The most distinctive treats Gen Z would allow themselves while on a strict budget are household products, beauty/cosmetics purchases, and experiences. It's somewhat unsurprising in a way that beauty or cosmetics are being purchased as a treat - case in point the **"lipstick effect"**. But Gen Z's preference for more experience-based treats like days out reflects how many are feeling after the last couple of years.

Bar millennials, Gen Z are more likely than older generations to say they've purchased a domestic vacation or vacation abroad in the last 6 months. Purchases of vacations are ticking upward YOY, suggesting Gen Z are prioritizing traveling even when finances are tight. The key behind this is finding joy again. When asked what could bring more joy to their lives in the future, vacations came out top for Gen Z, with over half feeling this way. There's also no denying the wellness benefits of vacations, and with Gen Z being more prone to anxiety, getting away offers some relief from life's everyday stresses.

British Airways' **new campaign** emphasizes the joyful side of travel and is likely to be popular with Gen Z. The campaign included ads which were responses to the question "what's the purpose of your visit?". There are 500 different lines written for the campaign, many like "To forget what day of the week it is" celebrate how joyful travel can be and are likely to be relatable for many people.

Gen Z's travel purchases are ticking upward

14

% of Gen Z who say they've purchased the following in the last 3-6 months (sorted by % increase)

Q3 2022	%	% increase since Q3 2021
Concert tickets	19	+44
Travel tickets (e.g. a flight)	20	+23
Vacation (abroad)	12	+21
Experience (e.g. spa trip, day out)	18	+15
Vacation (domestic)	24	+12

GWI Core Q3 2021 & Q3 2022

33,051 (Q3 2021) & 39,499 (Q3 2022) Gen Z born between 1997-2006

Creating a Gen Z-friendly brand

In terms of motivations to promote their favorite brands online, Gen Z's reasons are primarily twofold - either they love the brand and want to have the feeling of being involved, or they're looking for something from the brand in return. This could come in the form of either access to exclusive content or services, or posting something about the brand which would enhance their online reputation or status.

In the end, Gen Z are only likely to promote their favorite brands online if they can identify with the brand. As we touched on earlier, Gen Z want brands to be relatable, as well as cool, young, and even funny. That's why such a large proportion of them are in favor of brands using memes in their marketing - it's a communication style they can identify with.

These things also underpin the actions they want brands to take as well - Gen Z's top thing that they want brands to do is to run customer communities or forums, giving them the opportunity to get involved. Communities can either be built on social media or elsewhere online - **LEGO Ideas** is a website where LEGO lovers connect over their mutual passion for the product as well as share their creations with LEGO products. It's a simple idea, but one that's attracted over **1.8 million users**.

Brand qualities

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

	%	IDX
Young	32	1.33
Trendy/cool	35	1.22
Funny	29	1.18
Bold	26	1.15
Smart	46	1.06

Brand actions

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

	%	IDX
Run customer communities/forums	18	1.13
Help you improve your image/reputation	24	1.12
Support charities	27	1.07
Offer customized/personalized products	28	1.07
Make you feel valued	35	1.04

GWI Core Q3 2022 39,499 Gen Z aged 16-25

Want insights tailored to your audience?

We've got you covered. Reach out and we'll explain the options.

Find out more

Appendix

1. What best describes your relationship status? • How many children do you have? • What is your current working status?

2. In the next 6 months, how do you think your personal finances will change? (Get better)

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

4. Which of the following do you feel describes you? • Do you personally, or does anyone in your household, currently have any of the following conditions?

5. Which of the following do you feel describes you? • Which of these are most important to you in a workplace?

6. What, if anything, would you like your bank to provide to help with? • How would you like your bank to provide help with your finances?

7. On an average day, how long do you spend watching television? • On an average day, how long do you spend watching online television/streaming? • What factor(s) are most important to you when paying for a film/TV streaming service?

8. Thinking about gaming, which of these things do you do? • What are your main reasons for gaming?

9. Which of these music genres do you like listening to? Please select all that apply

10. Which of these would you say is your favorite?

11. Which of these have you done in the last week? • To what extent do you agree or disagree with the following statements?

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 the following online sources do you mainly use when you are actively looking for more information about brands, products, or services?

14. Which of these products have you or your household purchased in the last 3-6 months?

15. 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 900,000 internet users aged 16-64 across 50 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.

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, **click here**.

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.

Internet penetration rates (GWI's forecasts for 2022 based on ITU 2017 and 2018 data)

This table refers to the total population in each market. The following internet penetration estimates are calculated using the most recent data from the International Telecommunication Union - a United Nations agency responsible for issues concerning communication technologies. The most recent published data from this source is from 2018 (and in some countries 2017), so GWI forecast the data forward to 2020 by making calculations based on the trend of internet growth in each country from 2000 onwards. This calculation is then adjusted based on other (usually national government) sources which can be used to provide an accurate overview of internet usage in each country. Note that the figures used to calculate GWI's own universe figures will be among 16-64s only, and will therefore be higher.

	%		%
Argentina	92	Mexico	82
Australia	99	Morocco	74
Austria	95	Netherlands	98
Belgium	97	New Zealand	97
Brazil	90	Nigeria	68
Canada	99	Norway	99
Chile	90	Philippines	75
China	76	Poland	92
Colombia	82	Portugal	89
Czech Republic	96	Romania	92
Denmark	99	Russia	95
Egypt	68	Saudi Arabia	91
France	96	Singapore	99
Germany	98	South Africa	78
Ghana	60	South Korea	100
Greece	91	Spain	97
Hong Kong	99	Sweden	98
India	44	Switzerland	98
Indonesia	63	Taiwan	97
Ireland	97	Thailand	71
Israel	96	Turkey	88
Italy	90	UAE	97
Japan	96	UK	99
Kenya	67	USA	98
Malaysia	94	Vietnam	72

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 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.

Sample size by market

This report draws insights from GWI's Q3 2022 wave of research across 50 countries, with a global sample of 246,761 respondents.

Argentina	1,839	Mexico	5,257
Australia	8,003	Morocco	920
Austria	2,098	Netherlands	2,628
Belgium	2,106	New Zealand	1,974
Brazil	9,198	Nigeria	875
Canada	6,569	Norway	1,400
Chile	1,402	Philippines	4,008
China	25,323	Poland	3,176
Colombia	3,942	Portugal	2,373
Czech Republic	1,314	Romania	1,317
Denmark	1,575	Russia	4,331
Egypt	1,834	Saudi Arabia	1,815
France	10,888	Singapore	3,545
Germany	10,888	South Africa	1,844
Ghana	919	South Korea	2,366
Greece	1,316	Spain	10,761
Hong Kong	2,065	Sweden	2,628
India	15,296	Switzerland	1,507
Indonesia	6,613	Taiwan	2,721
Ireland	1,443	Thailand	4,573
Israel	1,590	Turkey	2,104
Italy	10,508	UAE	1,890
Japan	10,578	UK	10,504
Kenya	923	USA	26,234
Malaysia	4,489	Vietnam	3,291

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