



**GENERATION Z
NOT DAZED.
NOT CONFUSED.**

The Story So Far

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The Progressive Generation



“The children now love luxury; they have bad manners, contempt for authority; they show disrespect for elders and love chatter in place of exercise. Children are now tyrants..... They no longer rise when elders enter the room. They contradict their parents, chatter before company... and tyrannize their teachers.”

Since Socrates first wrote these words around 470BC this view of the emerging youth generations has been consistent for Millennia.

As researchers at Havas and content creators at Vivendi, we have closely studied Gen Z (born between 1997-2012) for several years and we believe they are about to change this legacy view of youth.

At 2.5, billion Gen Z overtook Millennials in 2019 to become the largest generation on earth. Aged between 10 to 26 years old, they are humanity’s first generation born into the digital age; the youngest of the cohort were born the year Facebook announced it was a mobile-first firm. Being digital natives is fundamental to who they are. The virtual and IRL co-exist seamlessly, fluidly, without borders. They pride themselves on being ‘phygital’ (physical-digital) natives.

In the following White Paper, we examine how Gen Z are shaping this change in legacy; sharing our view of this nuanced, connected and extraordinary generation. From a tech world driving prospects and underpinning their lives to the shocking realities of unsustainability, this generation is united in the opportunity - and the absolute need - to progress.

Are we about to commit the same mistake we made for Millennials, buying into an entire idea of a generation, and rejecting the concept that consumer cohorts have multiple perceptions and experiences? The answer is no. There is, and always will be, the need for segmentation and analyses within life stages.

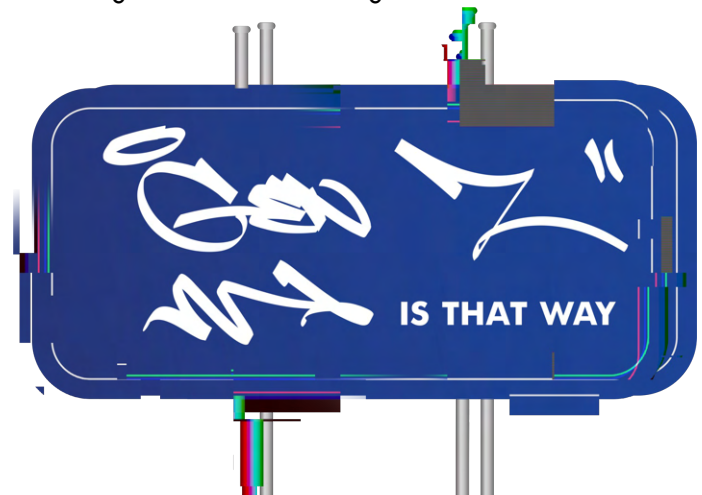
Our mission is to understand and harness the incredible potential of Gen Z, a generation woven into culture and purpose, and the power they wield to impact business and brands.

Could Gen Z be the most progressive generation yet? Will this generation fix the wrongs of their predecessors?

Maybe.

Are they up to the task?

Definitely.



Who are Gen Z & How Do They Sit in the World?

A life fulfilled in a pocket, a generation of global citizens

The smartphone is their fifth limb. Receiving a first device at secondary school age, almost this entire cohort owns a smartphone. Crucially, they access, perceive, live their life through it. Unsurprisingly, 79% claim they can't live without it, and it's not just entertainment on OTT streaming services or trying their hand at being creators on TikTok.

Unlike Millennials, educational content is not forsaken for entertainment. More than two out of three Gen Z seek to learn something when watching a video versus 20% streaming for entertainment*.

Nearly 80% use their phones for educational support at schools, colleges and universities, from taking notes, accessing text-books and writing papers to checking grades. What's more, test scores of low-income students climbed as much as 30% ** after receiving access to smartphones—an increase attributed to the fact that students were able to keep connected with teachers and classmates, even while at home.

Representing 25% of the global population, Gen Z's access to finance is significant; 'pester power' income is an estimated \$660bn*** in the US alone. Their phone acts as the catalyst to this commercial impact. Over a third of Gen Z transactions are on mobile; of all generations they research the most on their mobiles before they purchase; and 60% use social media to seek inspiration, research products and connect with favorite brands.

Acknowledging this unique and diverse relationship with their phones, asking a Gen Z to "get their face out of their phone" is literally like asking them to stop living. For this generation we must move beyond the easy stereotype of 'a screen-addicted youth'.



They are the smartphone-empowered generation, with the vast majority now saying they have a more versatile skill-set for future careers compared to previous generations; over 50% feel confident when talking about current economic and cultural topics. Who are we to take that away from them?

Diverse, Tolerant and Connected

This pocket-shaped window to the world makes them the most connected to each other out of any cohort and the most empathetic to their own generation's global realities, challenges and opportunities. While resoundingly global in ethnicity, Gen Z's voice is seeing the biggest growth and share in developing markets in Asia and Africa.

Embracing global ethnicity is also driven by the change in racial and ethnic make-ups for all generations around the world, cascading down to Gen Z. In the US, a small majority, 52% of people are non-Hispanic white. Significantly, one in four Gen Z are Hispanic, 14% are Black, 6% are Asian and 5% are one or two more other races. Europe's ethnic diversity across all generations has increased in recent decades to impact Gen Z. 24% of people on average are of mixed race with Russia, Turkey, Spain, Ukraine, Germany, UK, Italy and France representing over 70% of this figure. Africa, North America, Central & and the northern part of South America are all, at least, at 40%****.

With the rise of inter-racial relationships and partnerships in the 90's and 2000's, Gen Z represents - by far - the most ethnically diverse cohort on the planet today and they embody 'Global Citizenship'. They leverage their global citizenship for good; for example, to influence global climate change to collectively make everyone accountable. They are also more likely - 63% - to support liberal values on same sex marriage; 74% support equal treatment for transgender and 89% equal treatment for men and women. Gen Z are more in favor of making it easier for migrants to live and work legally. They also seek better representation in society for all minorities, - 73% demand better representation for disabled people.

* GWI Entertainment 2021

** itsLearning, *Generation Z: Growing and Learning with Mobile*

*** Global Trends Among Gen Z, GWI & Snap

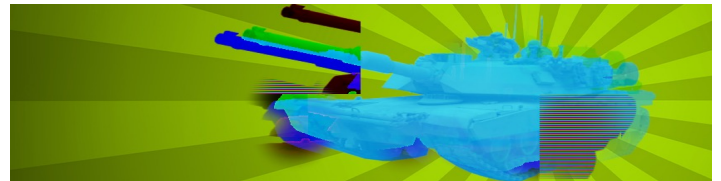
**** Pew Research

The Shaping of Gen Z

6C's of Gen Z and the Cultural impact of Constant Connection

Understanding Gen Z is to understand the context of the world in which they live.

Gen Z have faced constant **Conflict** in their short lifetime. Russia's invasion of Ukraine, a hike in violent crimes, the cruel murder of George Floyd revealing systemic racial injustice, young Iranian women leading the fights against repression.



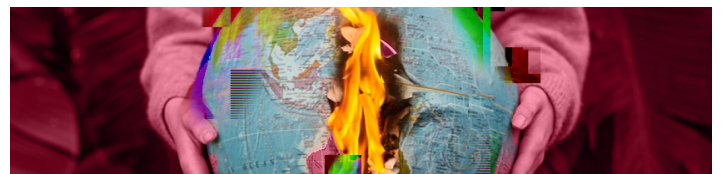
Credit Crises have peppered this generation, from the Asian financial crisis to the early dot.com bubble and global recessions in the 2000's. Today they face unprecedented inflationary times across developed and developing markets.



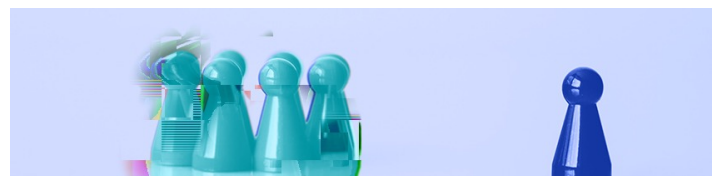
Covid engulfed over two years of their short lives and stripped educational rites of passage away. They are still very much living with the impact – both educationally and in terms of mental health.



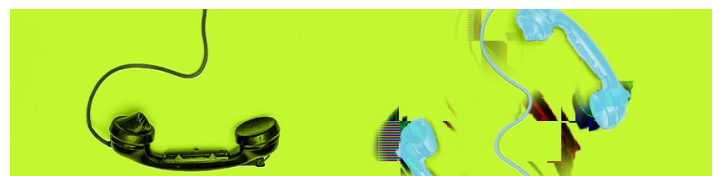
The impact of **Climate Change** is becoming a reality with every apocalyptic headline. Modern youth is leading the charge for the world to wake up and act.



A sense of **Collaboration** has emerged in the world they inhabit. Gen Z have witnessed shared responsibility, and the removal of stereotypes; the rise of volunteerism; and the advent of gender and sexual orientation equality.



Connected. Their lived experiences are viewed through a fragmented, digital lens, ceaselessly amplified through social media. They face looping 24/7 news cycles. Gen Z are plugged into connectivity and connectivity is plugged into them.



This degree of connectivity has bred a generation of empaths, fighting for what they believe is right on a local and global scale. Cancel culture and 'cosmopolitanism' have come of age with Gen Z. And confronted with a torrent of misinformation and 'fake news', modern youth is cynical about information they can trust.*

Diversity is not an inclusion, it's an expectation. They are pioneering groups that have yet to find a voice. Sustainability is not a way of choosing, it's a way of being – "how can I re-cycle, how can I re-sell, how can I re-use?". They are the generation with innate purpose, innovating in every part of their lives.

They are also the most measured generation. Tech-savvy yet displaying intrinsic nostalgia for a simple life; politically progressive yet less than a third align to a political party; the most accommodating to religion yet at one in five they are the largest generation of atheists; entrepreneurial yet incredibly frugal. They are not dazed or confused. They are clear-sighted. With crystal-clear aspirations for a better world.

*Vice Media Group, The Culture of Trust Study, 2021-2022

What does it mean to be a Gen Z?

A world inflicted with constant Conflict

Our strong sense of collaboration! 🙌

we stay connected 📶

DON'T TALK ABOUT...

POLITICS

As many Gen Z are coming of age in the 2020s, this largely left-of-center cohort do not really believe any party is campaigning for what they believe in.

SEX

Gen Z wants to 'fill their own cup' before connecting with others. Shaping their own identity and exploring different types of relationships, to identify what makes them feel the best, takes precedence. Only 1 in 10 say they are 'committed to being committed'.

RELIGION

They are losing religion. In the US, Pew Research** examined teens' relationship to religion compared to their parents. Data showed while 43% of parents claimed religion was "very important to them" only 24% of teens answered similarly.

Mama & Papa

Washed in the Gen X Effect

Undeniably, the global context has had a defining impact on this young generation. And closer to home, so have their parents. The Gen X generation, born between 1965-1985, preceded the Millennials. Millennials had largely late Baby Boomers as ‘helicopter parents’ placing all the experiences, expectations, and sense of privilege - borne from post-war opportunities - on their offspring. By contrast, Gen X experienced conflicts and credit crises, not felt by the Baby Boomers, and which are unequivocally influencing how they raise their children, the Gen Z.

The cold war, terrorism, the war in Iraq, the hostage crisis, racial violence, the energy crisis, the beginning of mass corporate layoffs, the stock market crash, recessions, and political disengagement formed the cultural context for Gen X. A context which also bore progress - Man landed on the moon. And tolerance, the Berlin wall was torn down while glasnost brought visuals of East and West shaking hands. Of hope. Of meeting in the middle. Nelson Mandela was freed. Apartheid ended. Like Gen Z, Gen X sought to ‘reach across the aisles’, to embrace difference.

Media Explosion

Cheaper stereos, boom-boxes and Sony Walkman’s made music more accessible and portable to this generation. Music genres blew up - acid house, hip hop, trip hop – giving rise to the massive rave scene and ecstasy consumption. In a mirror effect, improved tech has brought the music experience even closer to the kids of Gen X. And just like Gen X, music is the number one passion point for Gen Z.

The notion of excessive ‘screentime’ for kids began with Gen X - this was the first generation to have TVs in their bedrooms.



Real and Virtual paths to Culture and Tolerance

While Gen Z cross borders with a swipe of their smartphone, travelling virtually between cultures, Gen X physically travelled. From working on kibbutz to taking a back-pack trip to Thailand, this generation clamored for new cultures and countries, all made possible thanks to cheaper flights and rail travel.

This was the first generation with a real sense of equal rights. More girls went to university than the previous generation, and reproductive rights moved up a gear with improved access to contraception and the morning-after pill.

Gen X’s cultural context bred a liberal parenting approach born from an empathetic and tolerant perspective. An approach washing over Gen Z and helping to shape a generation which is breaking the enduring view of youth since Millennia. Gen Z mark a pronounced rupture between Socrates’ words: these children are not ‘tyrants’, they are ‘tolerants’.





Media access Is their Life

Engaging this Nuanced Generation

Gen Z's coming of age is against the backdrop of relentless technological innovation. Round-the-clock internet access, on-demand information, social media as the portal for media experiences, streaming entertainment, and instant communication are the backbone of their everyday lives. Media access is their life.

I game, you game, we all game

Gen Z pioneered the normalization of gaming and gamification. With 90%* of them playing, gaming is a vital part of their culture. With this cohort you're not defined as a gamer, you just "play" in all walks of life from entertainment and work to investing and buying to love. 52% like to play games as a 'second-screening' activity while they watch TV. Gamified experiences are more meaningful for them.

Shaping the future of TV

Gen Z propelled the evolution of linear TV existing symbiotically with streaming. At 1h 28m in 2020, compared to 1h 27m 2021*, 2021 marked the first year Gen Z spent slightly more time watching online than watching linear TV. As primary trend-setters, Gen Z's behaviors are bellweathers, indicating where the TV watching trend is headed. Netflix and YouTube hold a good share of Gen Z eyeball, but live-streaming platform Twitch, popular for gaming and now attracting other entertainment genres, has grown at a fast rate. In 2021, of the 22.8 billion hours watched on Twitch, a massive 41% of Twitch users were between 16 and 24 years old.**

The way Gen Z watches TV – second and third screening, watch parties and chatting with friends simultaneously – is shaping and inspiring the way platforms operate, collaborate, and innovate. One of the biggest drivers of live streaming, for example, is a return to the ‘QVC shopping-TV channel style’ format. Interactivity, conversation and advice on use are driving commerce across all platforms at ten times the rate from a decade ago***.

Love me, love me not

Of all generations today, the impact of social media on Gen Z is the most marked. Facebook arrived in the first years of their birth. Social media platforms have grown up with Gen Z. Social has catalyzed the evolution of industries and disrupted the shape of daily life. As the social media, ‘TikTok’ generation, Gen Z were integral to this phenomenon.

But their view of social media is conflicted. While they spend the most time on social compared to all other generations, they also feel this is too much. Mindful of the negative impact on their soul, modern youth is embracing ‘digital detox’ sessions, coming off social to create solutions to beat the digital blues. They are starting to monitor their rationale, relationship and perceived dopamine rewards with social to minimize the time spent.

They describe Facebook as “annoying but connected to friends and family” and “old outdated good for connections”. Instagram as “people portraying themselves falsely” and “kinda in decline”. By comparison, YouTube, despite its age, is still seen as “cool and very useful” “entertaining, informative and friendly” “everything all of the time”. The recent kid on the block TikTok is “very trendy and connecting to real life situations” but in parallel they believe the bold reality is that it’s “fast, time-killing content”****.

Their love-hate relationship with social is helping to fuel the desire to connect back to something more real, to pre-social media times. Harvard found the vast majority of Gen Z** say life was better before social media. Tapping into Gen Z’s growing calls for more authenticity, photo sharing app BeReal recently arrived as the ‘anti-Insta’. Downloaded over 67m times and with 73.5m monthly active users, the app uses the camera’s double-facing function to take a photo of what the users are doing at the time of selfie and share images of users’ unedited selves.

Wonderwall and All

Music is the number one passion for most Gen Z. The increasingly connected global music landscape means Gen Z can easily explore new artists and genres, crossing country borders and continents with a simple touch on their smartphone. Gen Z fans are seizing opportunities to share music they like and love, whatever the origin and genre mix.

They’re even breaking with tradition on genres. While music genres are roughly linked to the decade consumers were born or grew up in, this isn’t the case for Gen Z. Hip-hop sits next to ‘retro-gazing’ 90s music as top genres.*****

*GWI Entertainment 2021

**Business of Apps. Twitch users.

***Here’s Why E-Commerce Growth can Stay Stronger for Longer, Morgan Stanley

****Knit social media report 2022

*****Generation Z and Entertainment, Vivendi, 2020

The Milieu behind Meaningful Media

A complex, nuanced generation resisting society's pull to be 'pigeon-holed', their desires are about much more than being entertained. Their passion for consuming media, fashion, and pop culture of yesteryear is fueling Y2K nostalgia for the likes of Oasis, retro-photo apps, vinyl records and platform trainers. And crucially, it's about giving greater context to a changeable future.

This cultural 'retro-gazing' is a longing to return to a simpler past; content like the 90's TV series Friends or today's Stranger Things set in the 80s, inject meaning into their media. Nostalgia, a poignant longing for simpler times, feeds a direct connection to their Gen X parents with whom they also have an enduring youth correlation.

But. They do not bury themselves in the past. They look in the rear-view mirror to re-live and learn from the past; viewing previous times through their progressive lens. They observe the lack of diversity, misogyny, and toxicity at the turn of the century and seek to learn from this, to define an improved future. As the pragmatic, self-taught generation, they have an innate ability to identify how to improve the context. They are looking to the past to reshape a better future.

A FINAL WORD

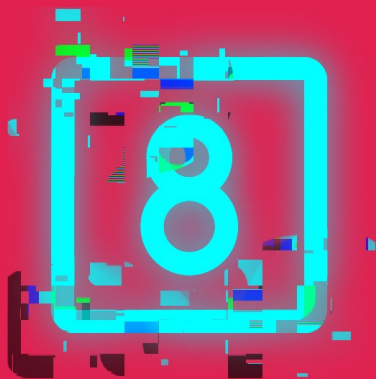
A rupture from previous generations, Gen Z are ripping up the playbook for cohorts. They have upended Socrates' long-held view of youth equating to tyrannical and disrespectful behavior. They are the most progressive, and responsible, generation yet.

Crucially, they have the tools, tenacity and self-awareness to drive the change they feel is so badly needed. Plugged into culture and purpose, their playground to nurture this change is everywhere media is, from the beat of a note to the word of a social media post. Meeting them there, through meaningful media experiences, where they play, will unlock massive opportunities for business and brands to reach the biggest cohort on the planet today.



11 TRAITS

Eleven traits contribute to shaping today's Gen Z. Understanding how they knit together in any one context is fundamental to track their digital journey and touchpoints to forge meaningful connections and create meaningful media experiences.



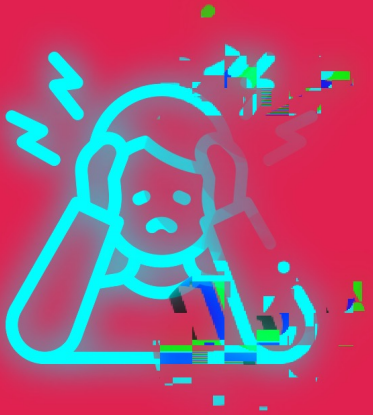
8 SECONDS

Attention span is less than a goldfish. But Gen Z aces at absorbing content quickly. They can speed read for success. This whip-sharp understanding of content means they decide quickly whether to click through – or not – to engage with deeper content. Gen Z thrive on consuming more of the right content – but this doesn't just mean hashtags or dance challenges, they require more substance than that!

ACTIVISTS

Their escalating uncensored connection to the world means that activism is second nature for this generation. They tap into the ever-wider circles of social media to activate followers for social/political/cultural causes. They understand effortlessly how to leverage socials to take activism from online to offline - omniscience has never been more important to connect with a cohort.





ANXIOUS

Bombarded by content – from financial crises and climate change to disease and politics, their unfiltered view of the world fuels heightened levels of anxiety. In addition, pressure to present carefully curated images of themselves to the digital world from an early age is leaving a mental mark, meaning they are consciously opting for more positive and progressive experiences of influence or avoiding it all together.

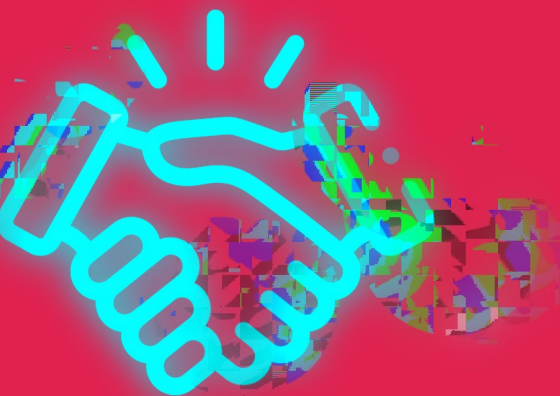
AUTHENTIC

Watchful of artifice and with a youthful wisdom garnered through massive exposure to the world around them, Gen Z crave authenticity. They embrace individuality and being genuine. Being real, feeling real and interacting with real are fast becoming Gen Z's therapy to feeling present and at one with themselves.



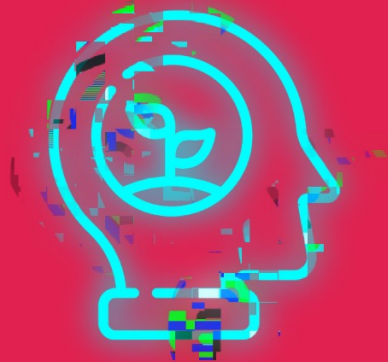
CO-CREATORS

Gen Z have an innate understanding of how to evaluate past and present challenges; and this in turn makes them brilliant innovators and solution providers. Co-creation is natural to them, so they seek a collaborative, personalized process that gives this cohort a voice in brand, product and services development across all verticals. From building a product to the pulse of a marketing campaign, co-creation ensures authentic content that resonates with this cohort.



CONNECTED

This generation connects across cultures, nurturing a borderless society of global citizens. Sharing videos, photos and music creates a sense of togetherness and community. 97% of Gen Z own smartphones and 60% say they are constantly connected, spending more than four hours a day online. Second, third, and even fourth-screening is commonplace.

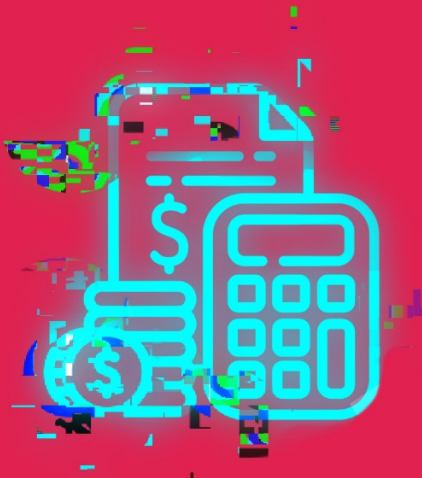


CONSCIOUS CONSUMERS

With the smartphone a window on the world, Gen Z travel effortlessly across continents, educating themselves about global environmental and ethical issues. This freedom to explore and learn continues to shape this generations' relationship with consumerism. Today and tomorrow, purchasing patterns will favor brands aligned with their values: re-use, re-cycle, re-sell.

CRAVERS OF MEANINGFUL EXPERIENCE

Saturated by virtual worlds and mindful of digital overload, Z craves 'In Real Life' (IRL) personalized experiences. Immersive moments that capture their full attention and alleviate their stress. Although digital natives through and through, 'phygital' (physical/digital) experiences hold a big appeal. Fully aware of their environmental footprint, they're willing to spend less on material goods and more on experiences. Brands that understand Z's latent desire for IRL and the delicate balance between Z's cyber and concrete lives will nurture real connections with this cohort.



MONEY REALISTS

Thanks to the ability to ramp up their knowledge at a reach of their smartphone, and their personal lived experiences of recession and economic fragility, Gen Z have a practical approach to money and spending. Financial security and savings are priorities for this cohort with the majority having savings. Over a quarter say that saving money and managing their cash flow better is most important for them to be happy and satisfied with their quality of life. And they are keen investors: Forbes' 30 under 30 list recently recorded its largest representation of Gen Z ever recorded. As digital natives, Gen Z's relationship with money is different from previous generations with financial transactions founded on contactless and cashless.

INCLUSIVE

Inclusive, tolerant and abhorring discrimination, Gen Z demands a society that embraces diversity and the freedom of individuals to choose to express their gender and sexuality as they wish. They are open to the multi-faceted ways of living a life and are totally at ease with uncomfortable conversations. Even in the least open countries, more than half are open to discussing difficult topics. When it comes to discussing "taboo" topics, countries in Europe are the most open.

Following the pandemic, inclusivity extends to the renewed appreciation for family and friends and the support they bring. They will carry this deepened connection through for many years to come. For Gen Zs on Snapchat this is particularly pronounced, with kindness at the core: 9 out of 10 describe themselves and their friends as kind**.



SELF-STARTERS

Expanding their knowledge beyond the physical classroom, it is second nature for Gen Z to compliment what they learn at school with digital dives. YouTube's endless library of learning is the preferred space for Gen Z to educate themselves. This ready ability to jump online to gain knowledge is nurturing a new breed of Gen Z 'teenpreneurs' with 1 in 3 Gen Z interested in entrepreneurship.

*GWI Entertainment 2019

**The Snapchat Generation, The Real Story, 2022. 2021 Global Cassandra Study

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ABOUT

About Strategy & Insights reports at Havas Media Group

This report is one of a series of Strategy & Insights reports. First and foremost, this report is a business tool to give companies engaging with Generation Z a clear picture of modern youth. This 360° snapshot of Gen Z - now the largest cohort in the world – explores this progressive generation and their engagement with media to support the creation of meaningful media experiences. We hope you use it to inspire your approach to this complex and endearing population. Enjoy!

Coverage

EMEA, LATAM, North America (includes Canada), APAC. Where possible, preference is given to purely global data and insights. Regional data and trends highlight cultural and consumer nuances.

Methodology

This report is based on a combination of secondary desk research and primary research interviews. See the Bibliography for a list of sources.

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