

Gen Z

Life Experience and Media Habits

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Future of Cinema

Gen Z: The YouTube Generation

Sun. April 8, 10:45-11:20

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LAS VEGAS, NV USA

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Thanks and Sources

“Plural and Media Consumption,” Frank N. Magid Assoc., **Mike Bloxham**, SVP Global Media and Entertainment

“The 2017 Digital Future Report,” Center for the Digital Future at USC Annenberg, **Jeff Cole**, Director

“The Next Generation of Consumers” presentation by **Jim Chabin**, President, Advanced Imaging Society

“The Centennials” presentation by The Futures Company

“We Are Gen Z,” presented by Sensis and ThinkNow Research

“Youth Movement: Gen Z Boasts the Largest, Most Diverse Media Users Yet,” 2017 Nielsen Total Audience Report, Nielsen Insights, July 12, 2017

“50% of Gen Z ‘Can’t Live Without YouTube’ and Other Stats That Will Make You Feel Old,” by Emma Bazilian, AdWeek, May 21, 2017

“Generation Z vs Millennials: The 8 Differences You Need to Know,” by Ryan Jenkins, Inc.com, July 17, 2017

“7 Ways to Engage Millennials and Gen Z On Social Media in 2018,” Cristian Contreras, SocialMediaWeek.org, Dec. 7, 2017

“8 ways to captivate Gen Z on social in 2018,” Gabriele Boland, Newship.com, Jan. 10, 2018

“Have Media Habits Changed Among Millennials and Teens?,” eMarketer, June 17, 2017

“Generation Z is already bored with the internet,” Daily Beast, April 3, 2017

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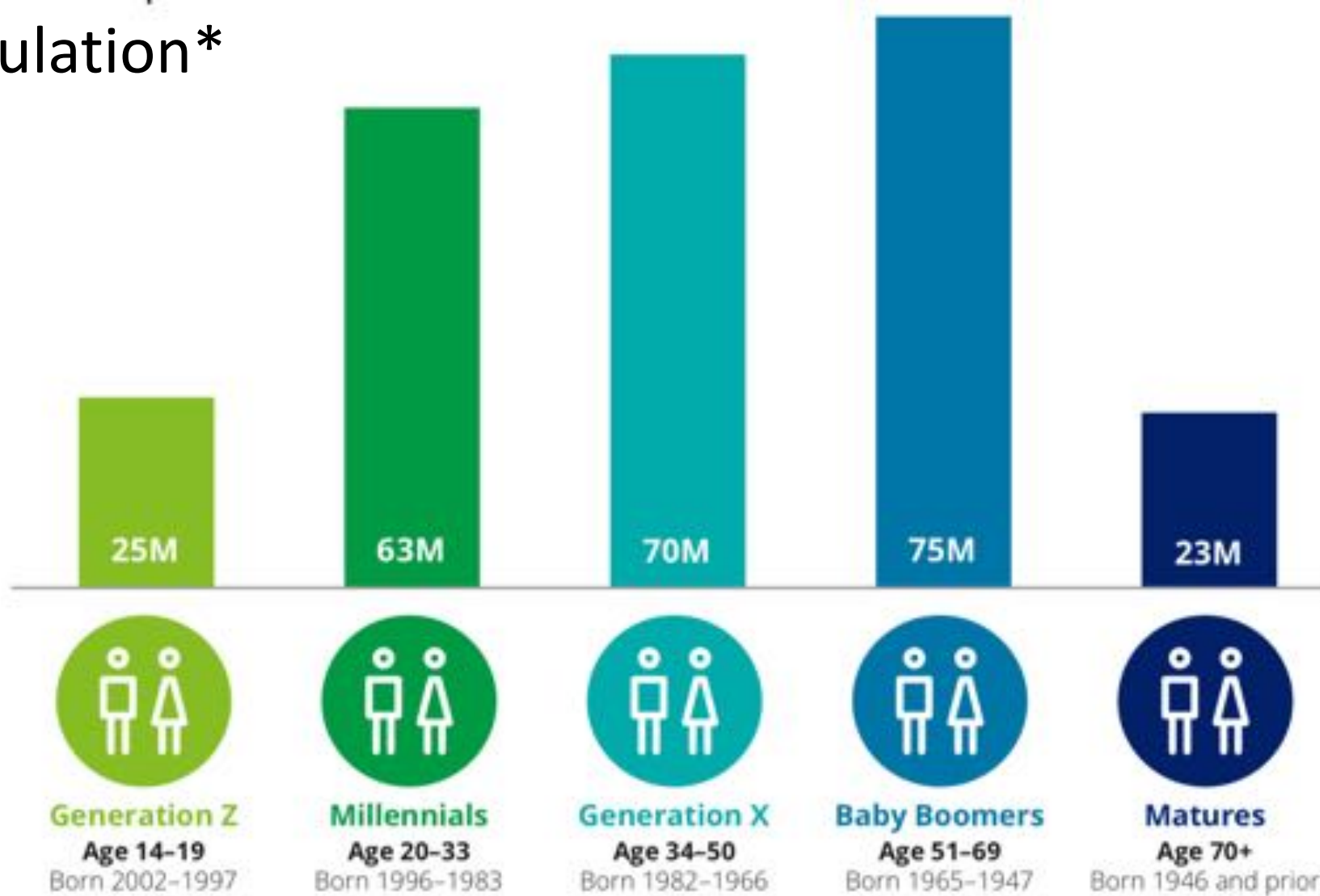
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2016 US Population*



*Gen Z
Plurals
Centennials*

* 2010 US Census Bureau – Population Division
US Interim Projections 2000-2050

Source: Digital Democracy Survey, Eleventh Edition, Deloitte

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Agenda

Setup – the world they grew up in

How they differ from Millennials and others

Media habits

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THESE WERE THE FACES OF YOUTH...



Beyonce



Justin
Timberlake



Britney
Spears



LeBron
James

BUT THEY'RE NOT ANYMORE



Beyonce



Justin
Timberlake



Britney
Spears



LeBron
James

FORMATIVE EVENTS: **SOCIAL**

MILLENNIALS

Gen Z

FORMATIVE EVENTS: **SOCIAL**

MILLENNIALS



MULTICULTURAL

Gen Z



FORMATIVE EVENTS: **SOCIAL**

MILLENNIALS



MULTICULTURAL

Gen Z



POLYCULTURAL

FORMATIVE EVENTS: TECHNOLOGICAL

MILLENNIALS



FREEDOM TO EXPLORE

Gen Z



NEED FOR SECRECY & PROTECTIONS

Phone Boredom



“Sometimes I feel like I’ve seen everything there is to see on the internet,”
Violet, a 15-year-old in the U.K.

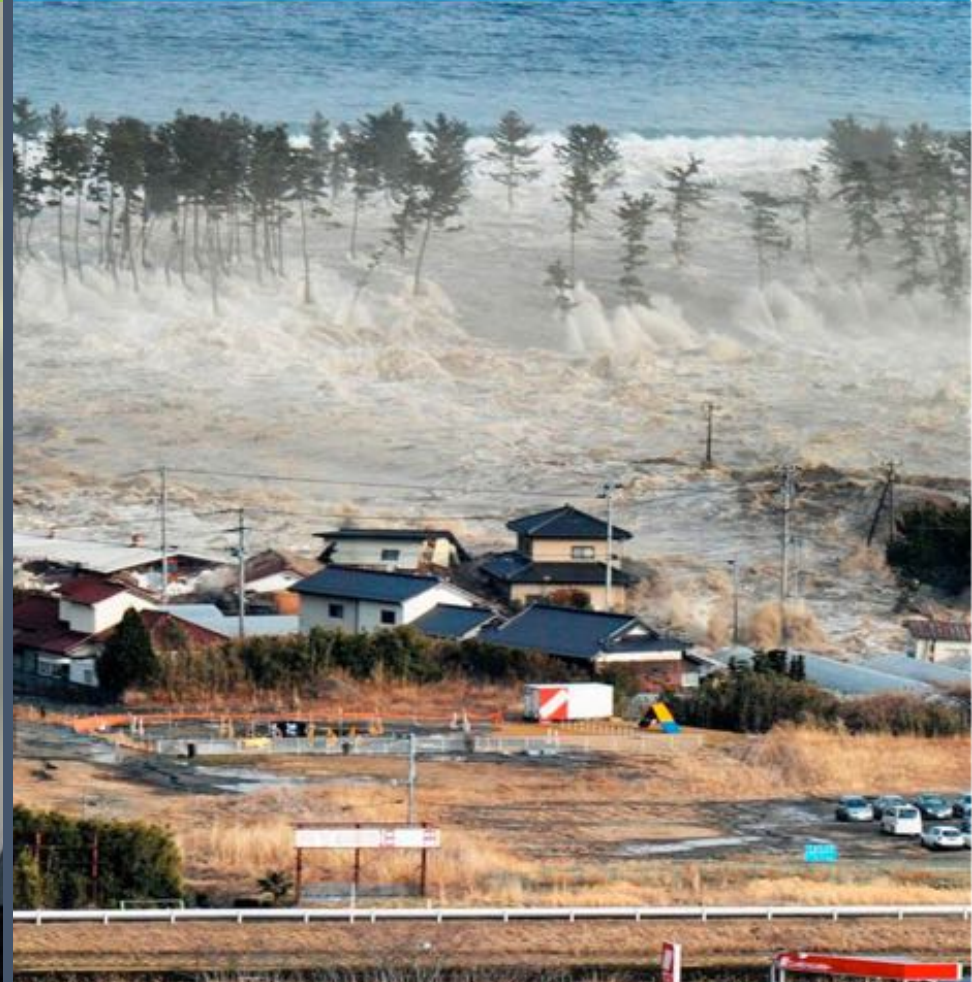
FORMATIVE EVENTS: ENVIRONMENTAL

MILLENNIALS



WE DAMAGE THE EARTH

Gen Z



THE EARTH DAMAGES US

FORMATIVE EVENTS: **ECONOMIC**

MILLENNIALS



ROBUST MIDDLE CLASS

Gen Z



HOLLOWING OUT OF MIDDLE CLASS

FORMATIVE EVENTS INFLUENCE COHORT DYNAMICS

MILLENNIALS



INTRAPERSONAL INTELLIGENCE

Gen Z



how to succeed in an
opportunity-impooverished
and less forgiving
landscape

PRACTICAL INTELLIGENCE

FORMATIVE EVENTS INFLUENCE COHORT DYNAMICS

MILLENNIALS



WORKING THE SYSTEM

Gen Z



WORKING AROUND THE SYSTEM

CURRENT MINDSETS

MILLENNIALS



BLINDSIDED. BACK ON THEIR HEELS.

Gen Z



EYES WIDE OPEN. UP ON THEIR TOES.

We Are Gen Z

Source: Sensis and Think Now Research Rpt.

1,365 subjects born 1995-2015

White, Asian, Hispanic, African American, Mixed Race

HOW OFTEN DO YOU HAVE
THE FOLLOWING FEELINGS?
(ONCE A WEEK OR MORE)

FEELING
STRESSED
(TOTAL 64%)



WHITE



HISPANIC



ASIAN



AFRICAN
AMERICANS

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Generation Z vs Millennials: 8 Differences

Gen Z

Realistic

Independent

Digital Natives

Private

Face-to-Face

On-Demand Learning

Role-Hopping

Global Citizen

Millennials

Optimistic

Collaborative

Digital Pioneers

Public

Digital Only

Formal Education

Job-Hopping

Global Spectator

Source: Ryan Jenkins, Inc Magazine, December 2017

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Globally, a 17 year old today...

- Met one of their closest friends, online
- Shares their social media username instead of a phone number
- Likely knows how to not only write code, but shoot, edit, and distribute studio quality video content
- Is coming of age in a society that is cause oriented around gender equality, equal rights, and social justice
- Feels a college degree is one path to success, but not the only one

Source: "The Next Generation of Consumers" presentation, Advanced Imaging Society

REVOLT

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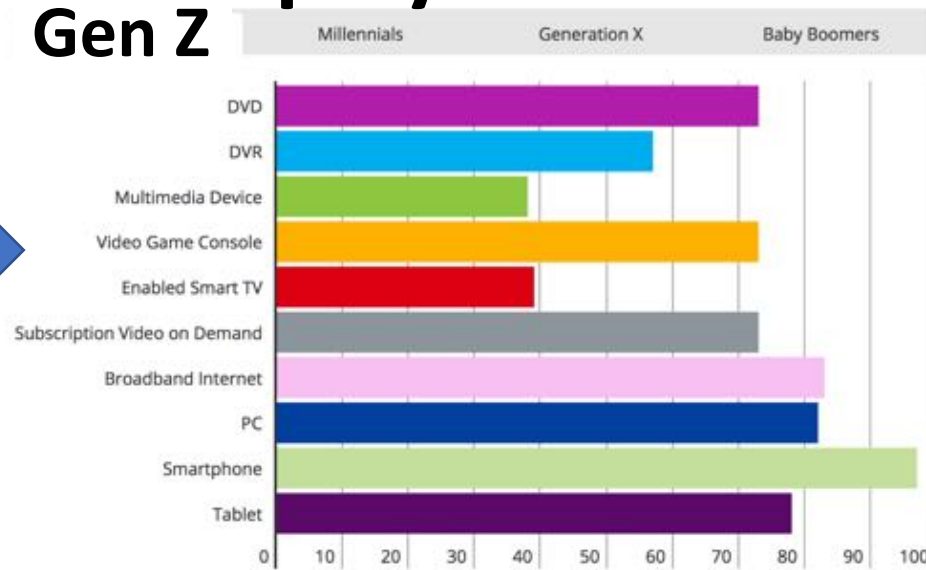
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Technology Ownership by Generation

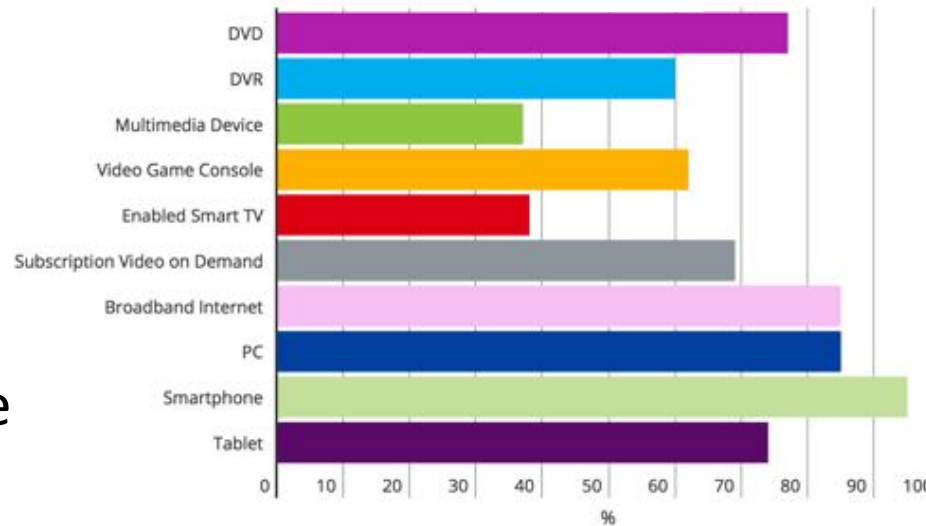
Video
Game
Console



Gen Z

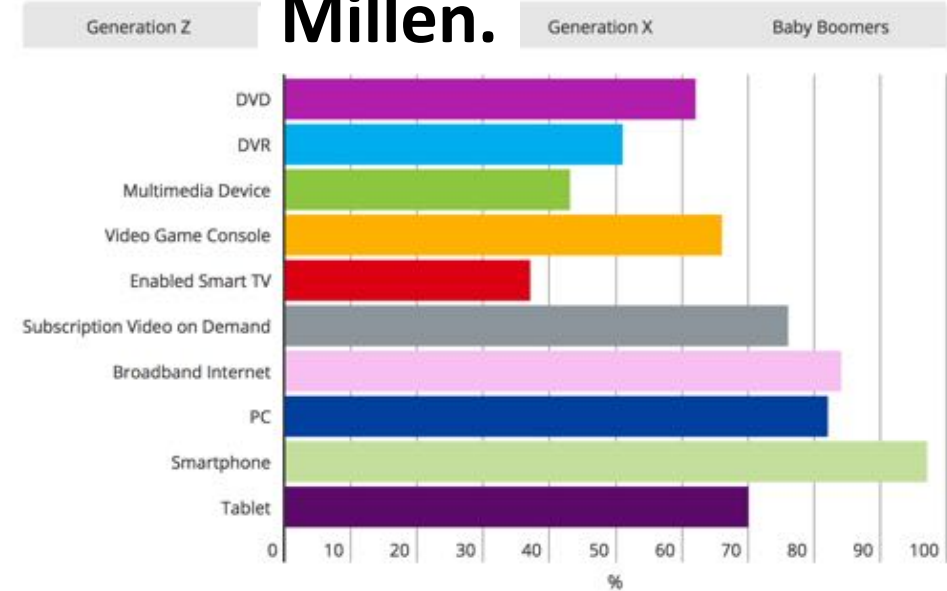


Generation Z Millennials Gen X Baby Boomers

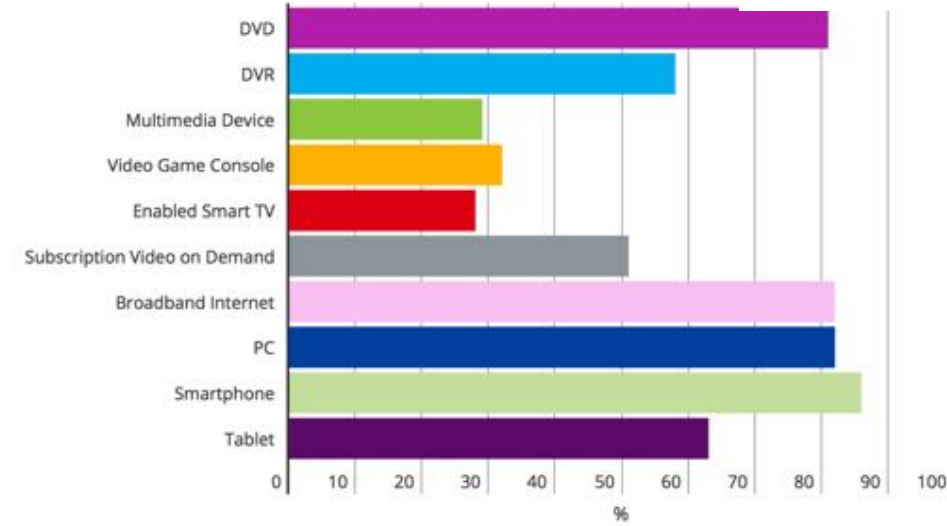


Gen X

Millen.



Generation Z Millennials Gen X Boom.



Boom.

Source: Q1 2017
Nielsen Total Audience
Report

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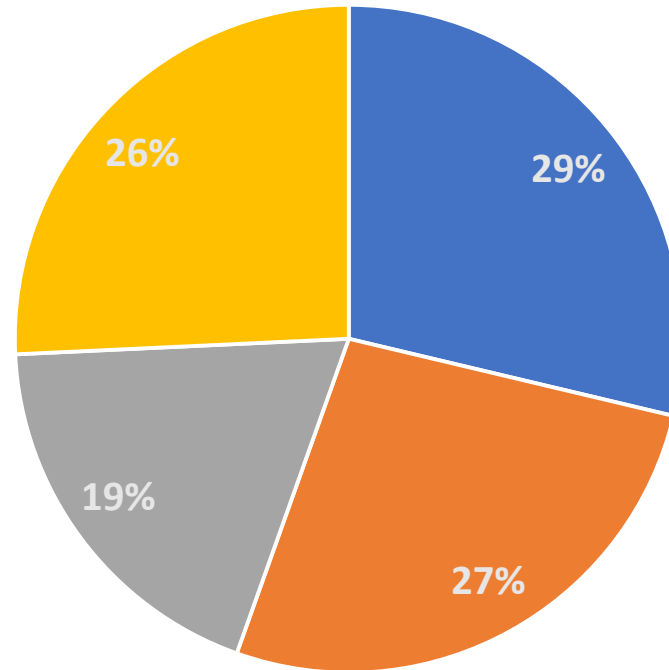
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AGE OF U.S. VIDEO GAME PLAYERS IN 2017

AGE BREAKDOWN OF VIDEO GAME PLAYERS IN THE UNITED STATES IN 2017

Gamers



■ Under 18 ■ 18-35 ■ 36-49 ■ 50+

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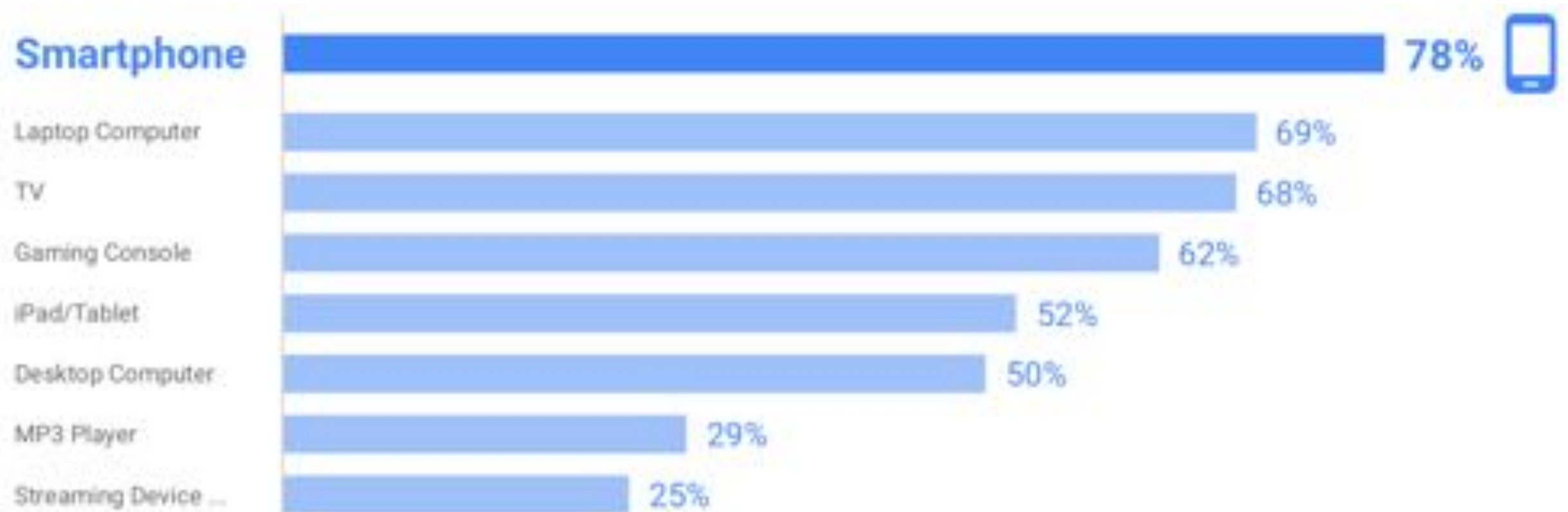
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Most used devices for 13- to 17-year olds



MT: Which devices do you currently use? Please select all that apply.
Base: All respondents 13 to 17 (422), 18 to 24 (267), 25 to 34 (314).

Source: Generation Z: New insights into the mobile-first mindset of teens, Google and Ipsos, data gathered Aug. 2016

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Time spent on activities on a smartphone by 13- to 17-year-olds



Source: Generation Z: New insights into the mobile-first mindset of teens, Google and Ipsos, data gathered Aug. 2016

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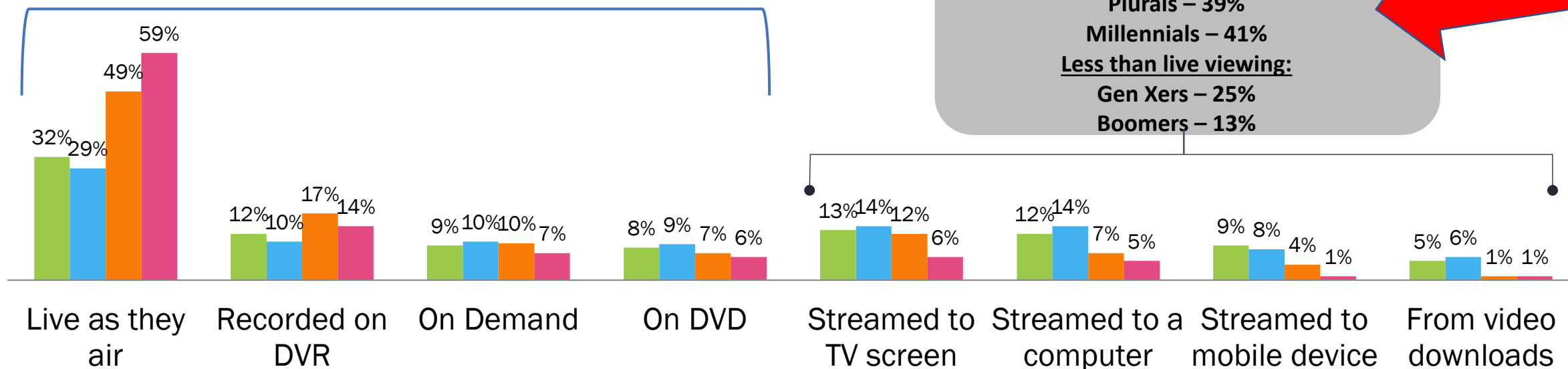
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Proportion of Video Viewing Time Spent with Each Platform

Plurals Millennials Xers Boomers

OTA / Cable / Satellite / Disc



Source: "Plural and Media Consumption," Frank N. Magid Assoc.

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70% of **US** Gen Z (14-19) watch Netflix each month
25% of Gen Z **worldwide** watch Netflix each month

Source: The Media Habits of Millennials, Generation Z, and The Rest of Us, Damian Radcliffe, 11/27/17

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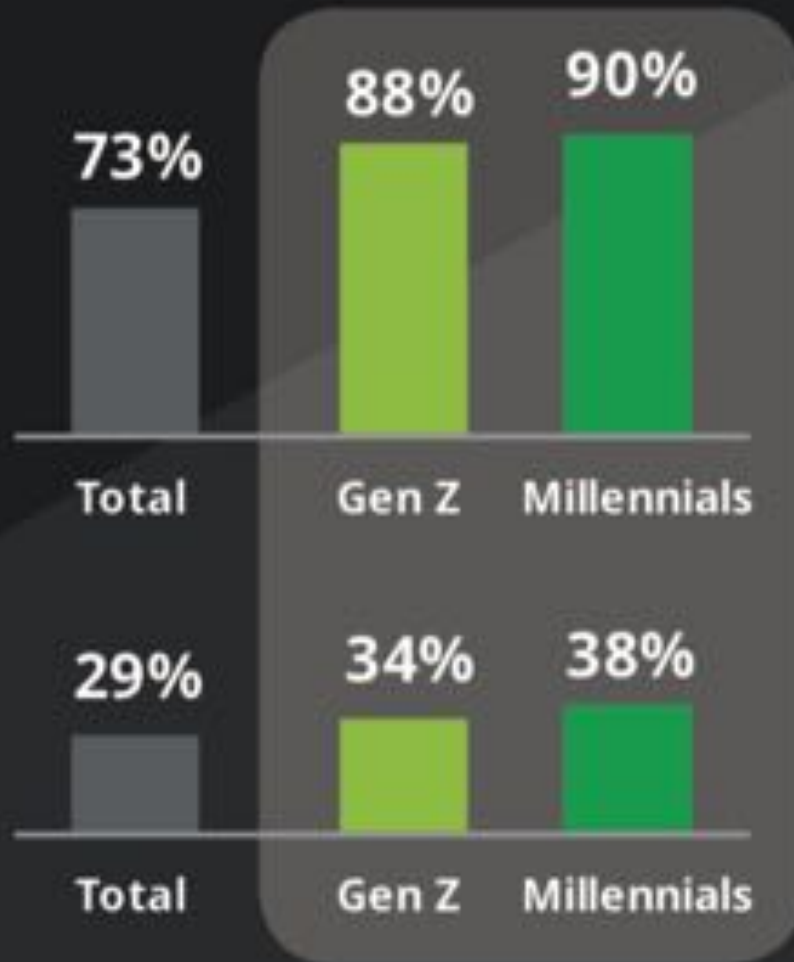
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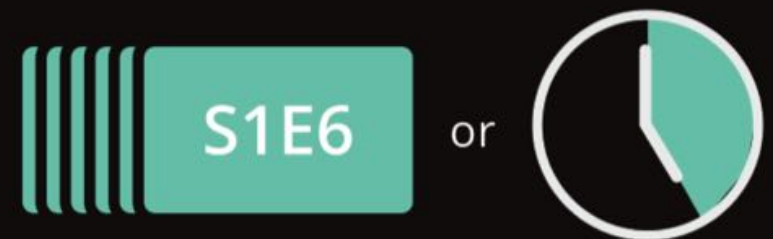
Consumers who
have binge-watched
TV shows



Percentage of weekly
binge watchers

5 hours per sitting

On average, they binge-watch
6 episodes or **5 hours** per sitting



Source: Digital Democracy Survey, Eleventh Edition, Deloitte

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Nearly all Gen Z'ers
use YouTube

YouTube 95%

Instagram 69%

Facebook 67% ???

Snapchat 67%

Twitter 52%

Google+ 37%

Pinterest 33%

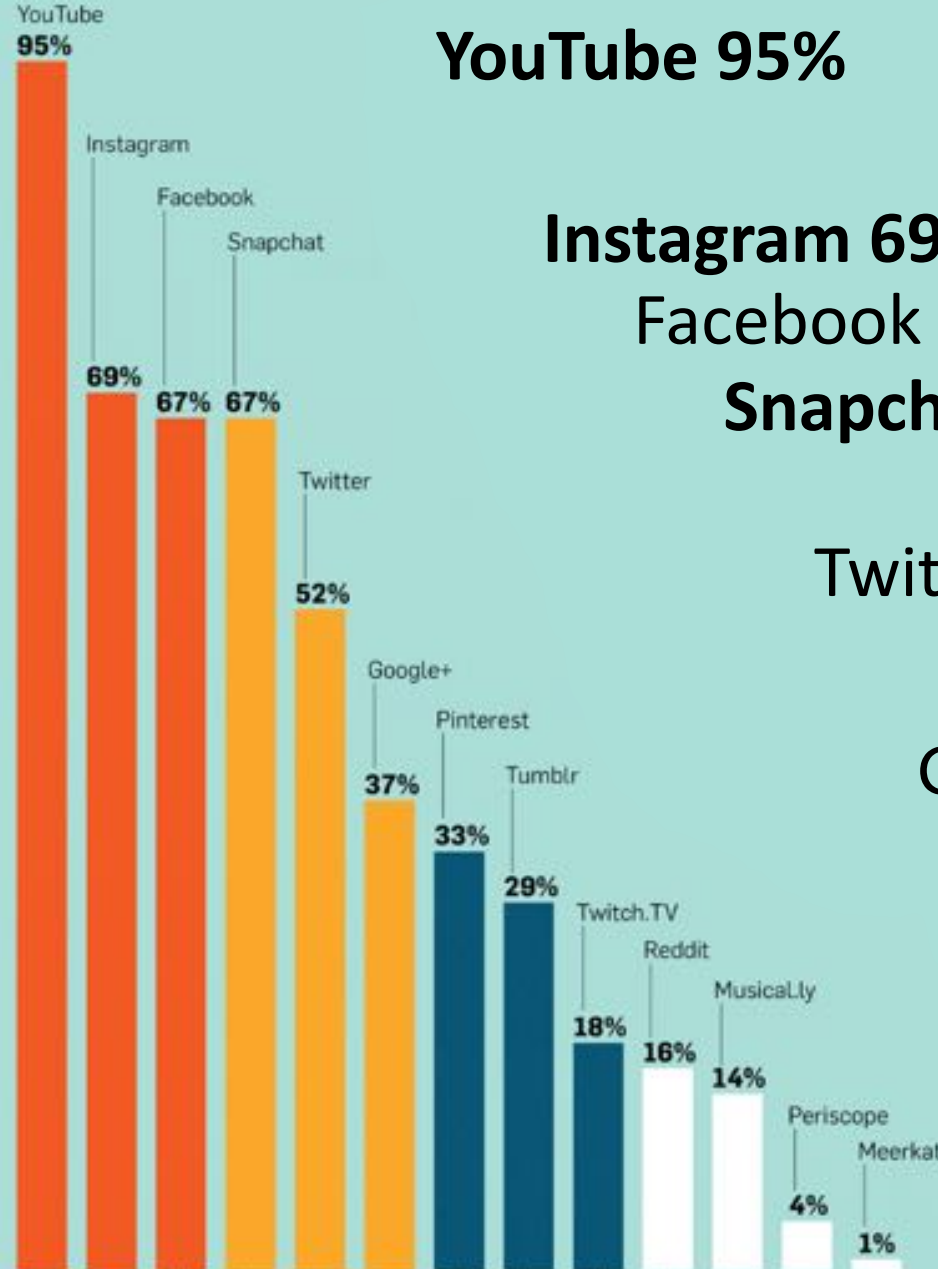
Tumblr 29%

Twitch.TV 18% ???

Reddit 18%

Musical.ly 14%

Source: Adweek 5/21/17



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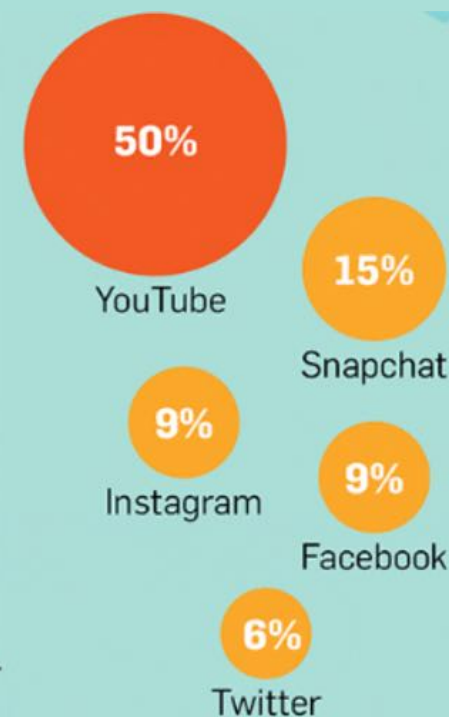
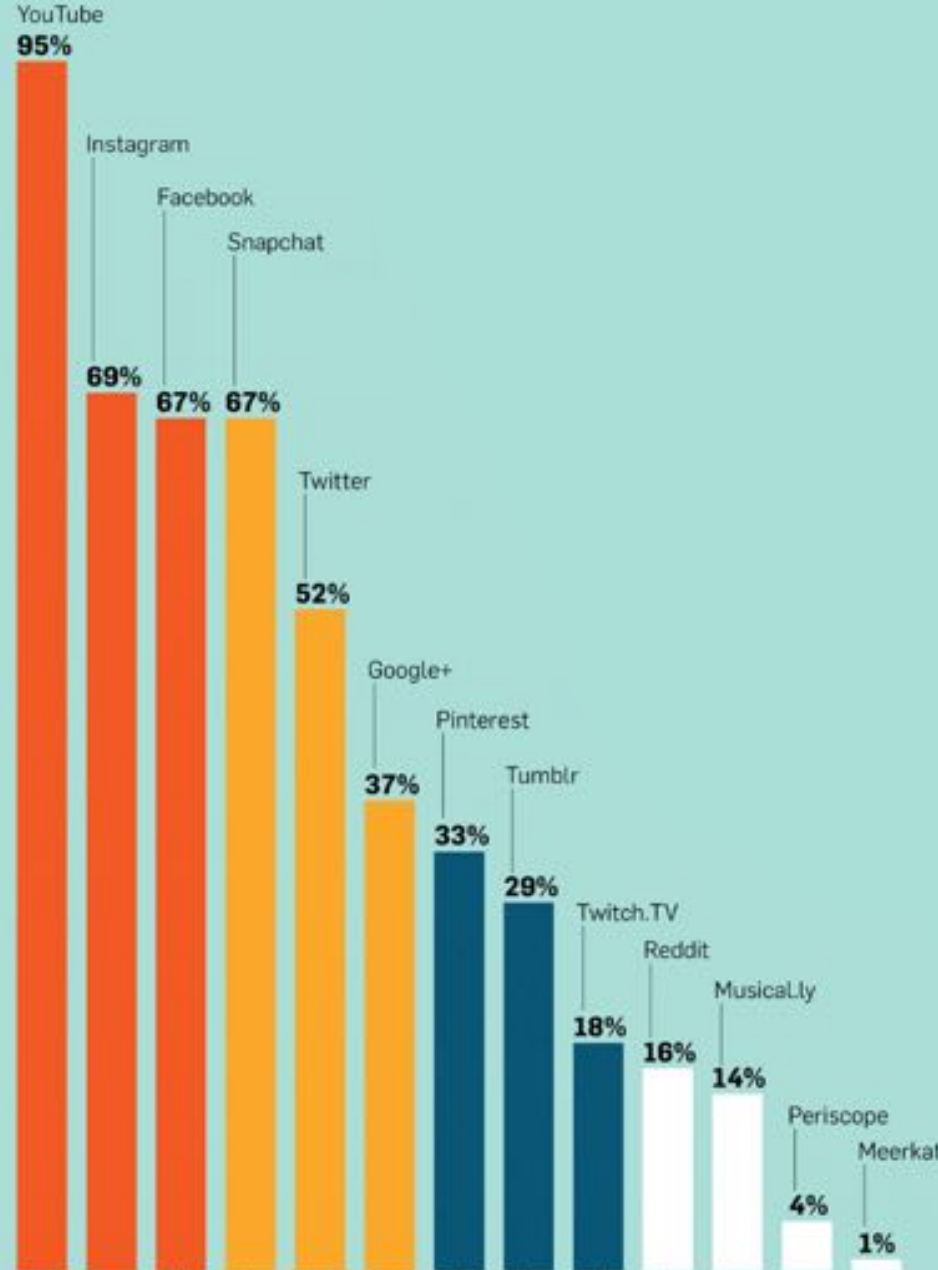


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Nearly all Gen Z'ers use YouTube

Half 'can't live without' YouTube



Source: Adweek 5/21/17

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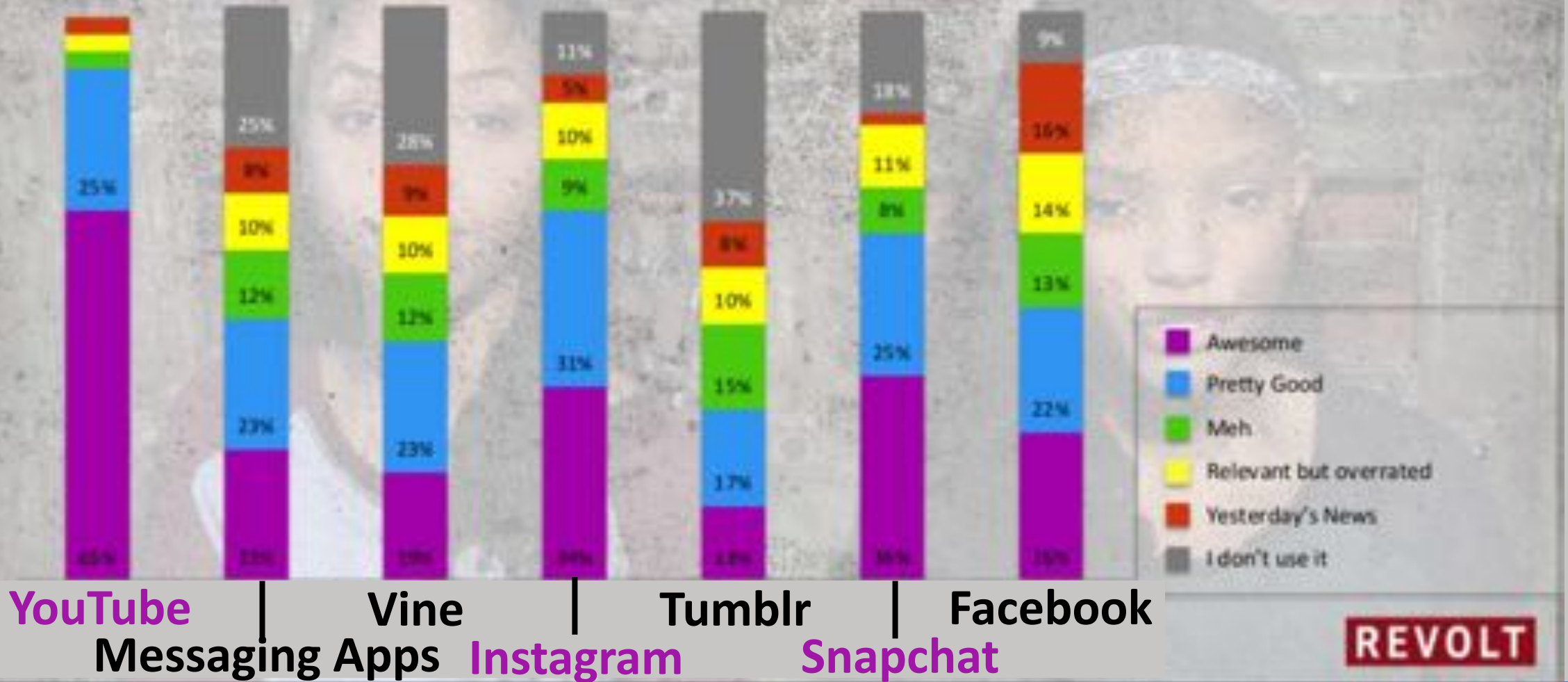
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If the medium is the message, YouTube, Snapchat, and Instagram are “awesome”



Source: “The Next Generation of Consumers” presentation,
Advanced Imaging Society

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9 Seconds Or Less

When shown 12 YouTube videos that featured delayed skippable pre-roll

- 16-19s tapped out in under 9 seconds
- 35-49s gave up to 13 seconds of their time



REVOLT

Source: "The Next Generation of Consumers" presentation, Advanced Imaging Society

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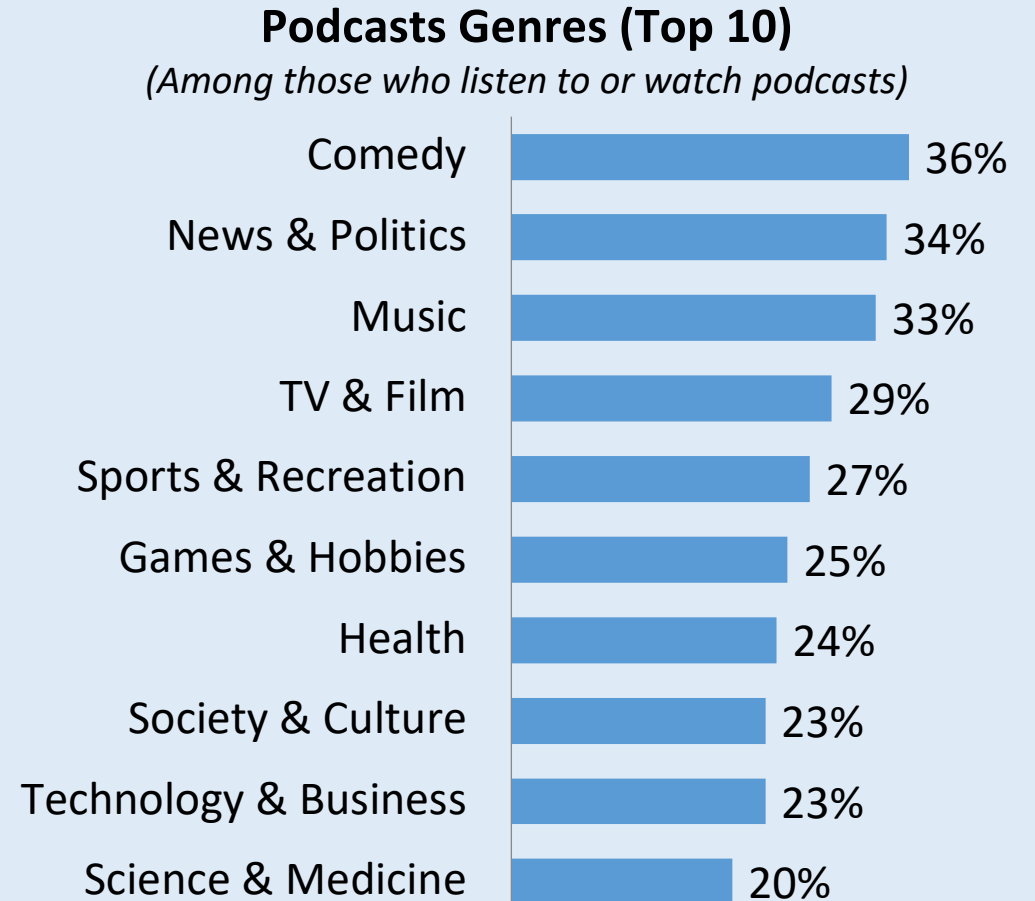


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YOUNGER GENERATIONS ARE LISTENING TO **PODCASTS**

Gen Z (13-17)	26%
Millennials (18-34)	33%
Gen X (35-49)	24%
Boomers (50-64)	14%
Men	29%
Women	20%



Source: "Plural and Media Consumption," Frank N. Magid Assoc.

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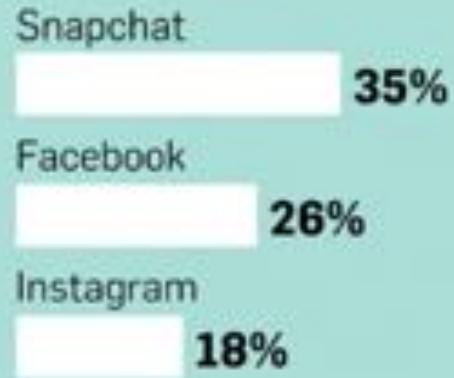


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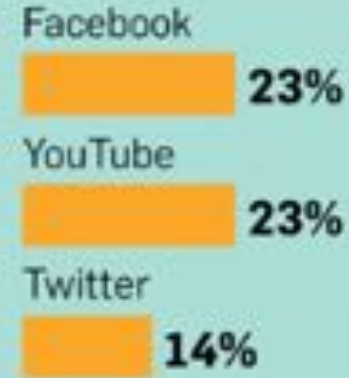
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Which platform do you use for...

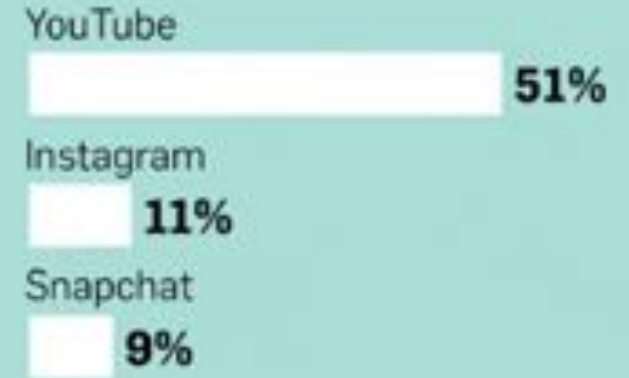
Keeping in touch with friends?



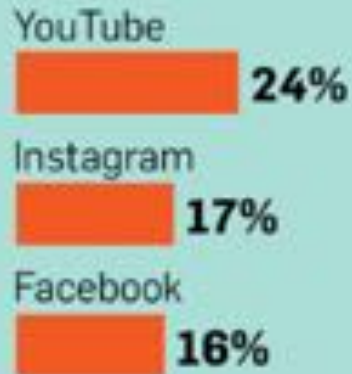
Catching up on the news?



A good laugh?



Shopping recommendations?



How-to info?



Source: Adweek 5/21/17

1,452 respondents
Age range 13-20

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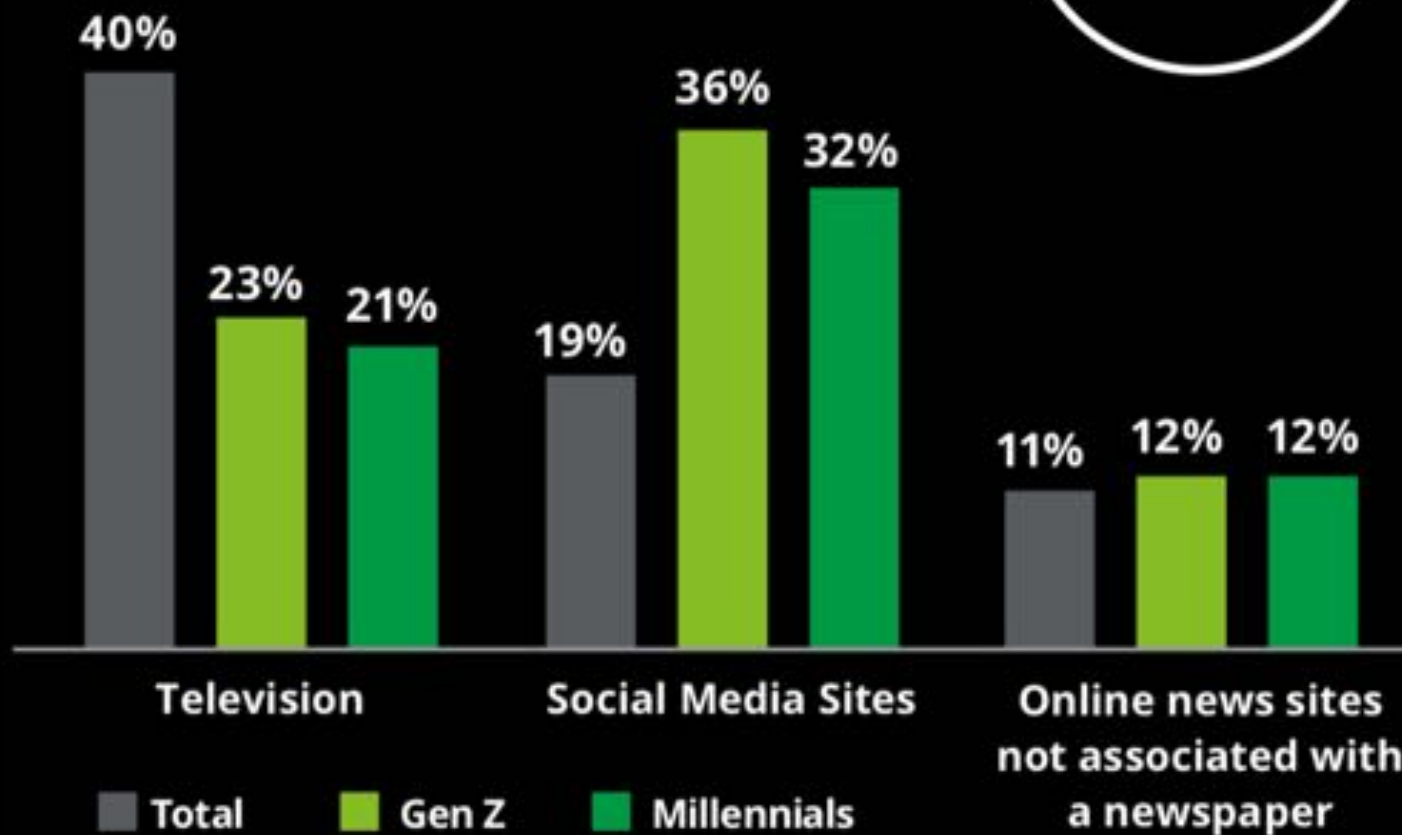
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The most popular news platforms



Source: 2017 Digital Democracy Survey, Eleventh Edition, Deloitte

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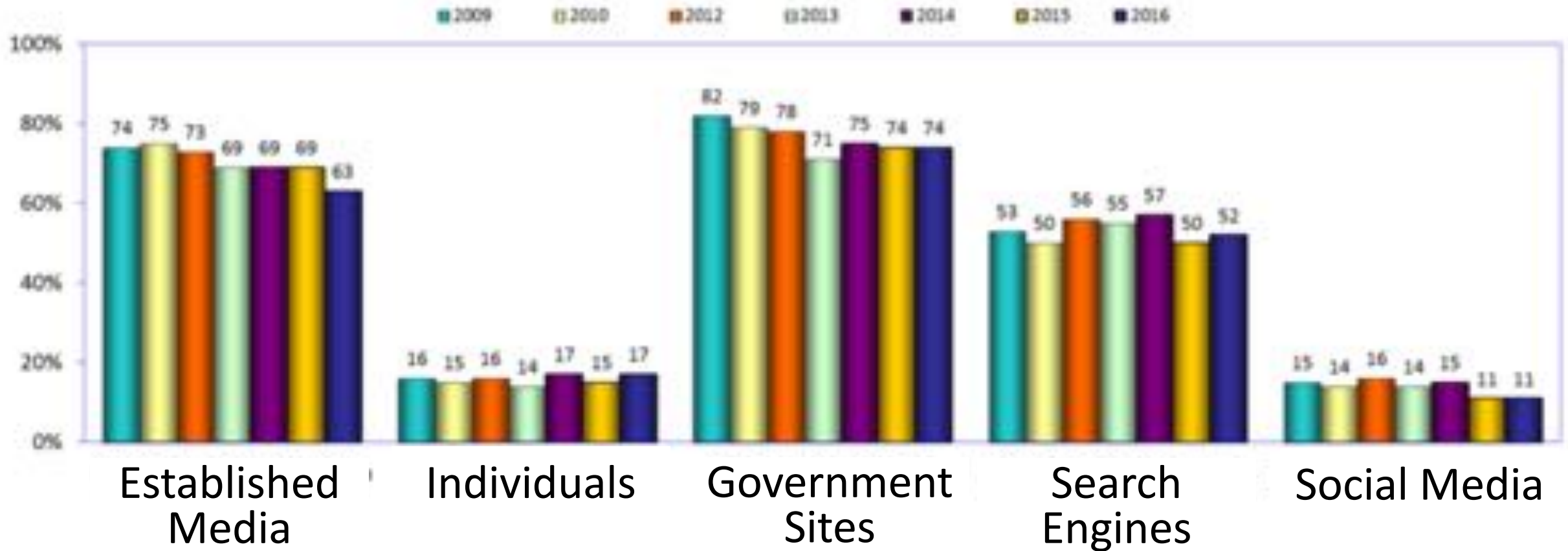


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How much information posted by these organizations and individuals do you think is **generally reliable and accurate**

Internet users age 16 and older, 2009-2016



Source: The 2017 Digital Future Report, Center for the Digital Future at USC Annenberg, Jeff Cole, Director

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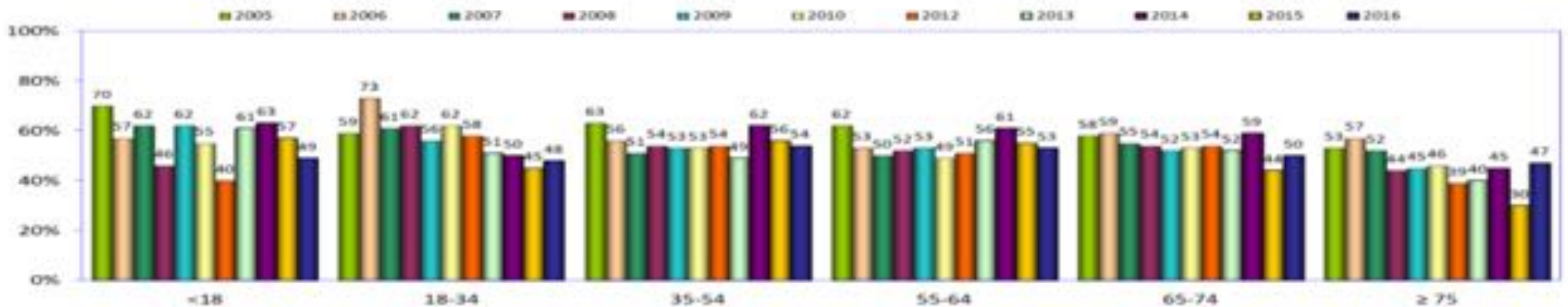
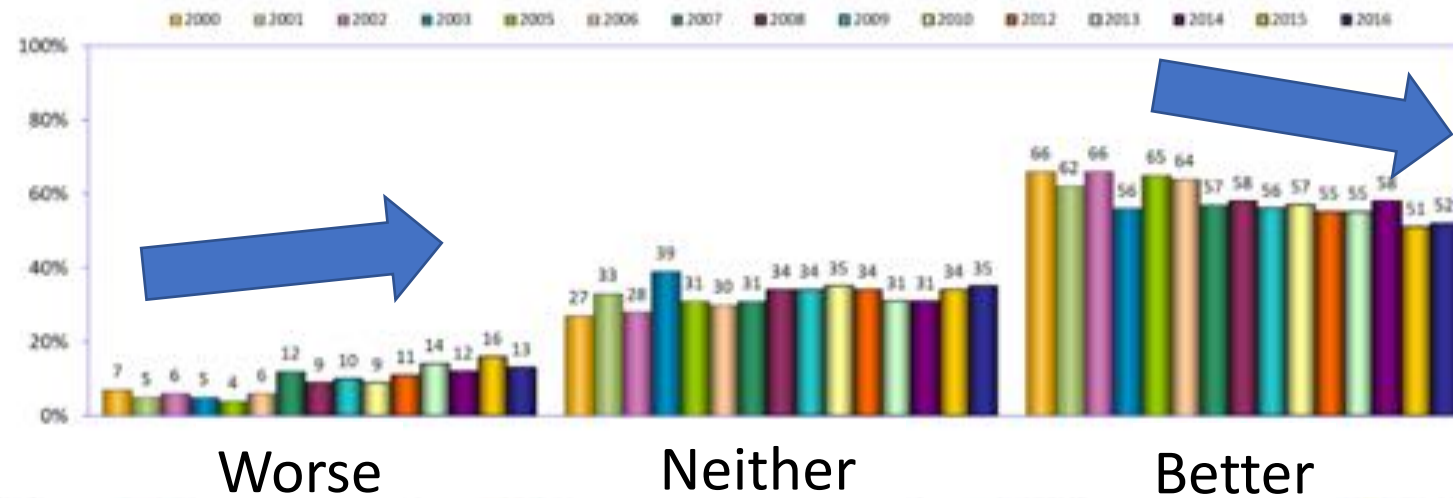
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Has **communication technology** made the world a **better place** or a **worse place**?

Internet Users age 16 and older

2000-2016



Source: 2017 Digital Future Project

Source: The 2017 Digital Future Report, Center for the Digital Future at USC Annenberg, Jeff Cole, Director

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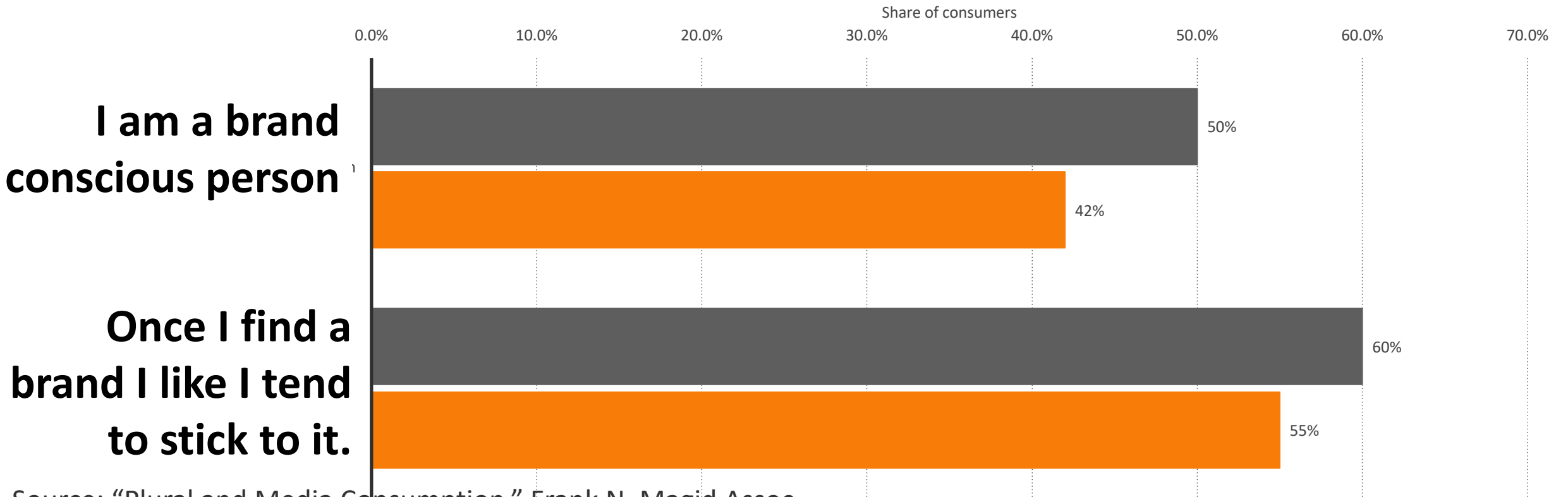
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CONSUMER ATTITUDE TOWARDS BRAND LOYALTY WORLDWIDE IN Q2 2017, BY GENERATION

MILLENNIAL AND GEN Z CONSUMER RELATIONSHIP WITH BRANDS WORLDWIDE IN 2ND QUARTER 2017

Gen Z (16-20) Millennials (21-34) Brand loyalty



Source: "Plural and Media Consumption," Frank N. Magid Assoc.

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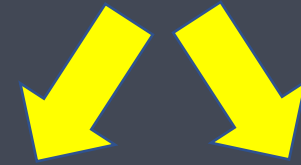
We Are Gen Z

Source: Sensis and Think Now Research Rpt.

1,365 subjects born 1995-2015

White, Asian, Hispanic, African American, Mixed Race

Gen Z men care about brands
more than Gen Z women!



Are you saving to buy a car? (yes)

I have a favorite brand

I prefer to buy products online

I like brands my friends like

I relate to brands that make me look cool

Males

Females

57%

39%

71%

60%

43%

34%

54%

47%

62%

52%

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Overall, how are things changing?

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Change in Usage of Select Media March 2017 vs. a year earlier

Look at the grey

Full-length shows / movies streamed digitally

Teens (13-17)



Millennials (18-34)



Regular TV

Teens (13-17)



Millennials (18-34)



 **MORE**  **SAME AMOUNT**  **LESS**

Source: Have Media Habits Changed Among Millennials and Teens?, eMarketer, June 17, 2017

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Change in Usage of Select Media March 2017 vs. a year earlier

Look at the grey

Short digital video

Teens (13-17)



Millennials (18-34)



Social media platforms

Teens (13-17)



Millennials (18-34)



 **MORE**  **SAME AMOUNT**  **LESS**

Source: Have Media Habits Changed Among Millennials and Teens?, eMarketer, June 17, 2017

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Generation Z vs Millennials: 8 Differences

Gen Z

Realistic

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Digital Natives

Private

Face-to-Face

On-Demand Learning

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Global Citizen

Millennials

Optimistic

Collaborative

Digital Pioneers

Public

Digital Only

Formal Education

Job-Hopping

Global Spectator

Source: Ryan Jenkins, Inc Magazine, December 2017

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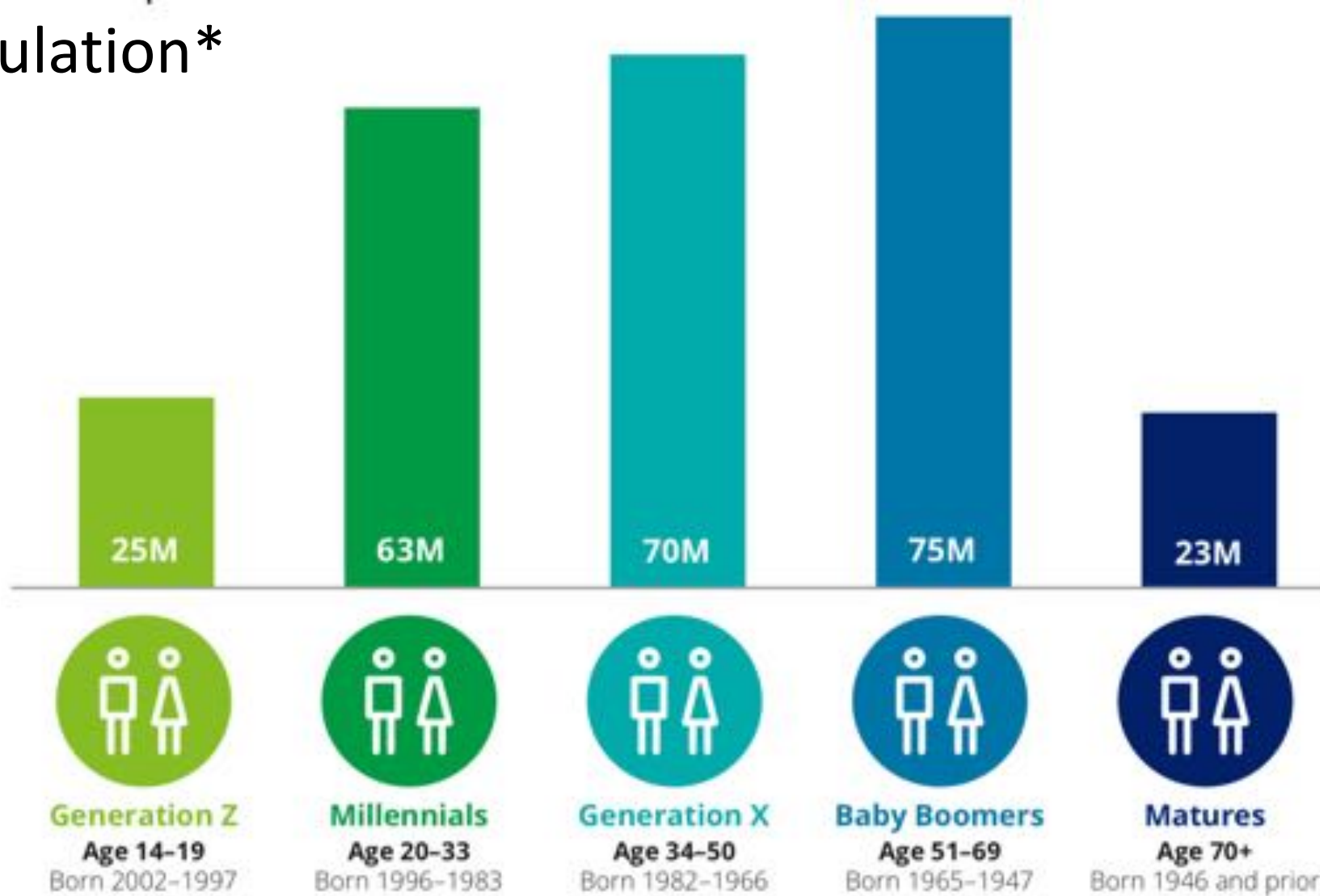
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2016 US Population*



*Gen Z
Plurals
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* 2010 US Census Bureau – Population Division
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Thank You!

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Phil Lelyveld

VR/AR Initiative program lead

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