

SPILLING THE TEA ON GEN Z



AN EXPLORATION OF GENERATION Z'S
THOUGHTS, BEHAVIORS AND TRENDS





STOP TRYING TO MAKE FETCH HAPPEN.

[It's already happening.](#) Fetch is the strategy & research division of Talking Dog, the University of Georgia's only full-service advertising and public relations agency. We are a team of Ad and PR students with a unique passion for analytical and strategic thinking centered around carefully designed and targeted research.

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#GENZ



WHAT WE DID.

Dedicated to uncovering insights about Generation Z (Gen Z), Fetch conducted secondary and primary research throughout the 2017-2018 academic school year. In order to address this broad research goal and better organize our findings, we identified six main research areas to focus on:

- **BEHAVIORAL TRENDS 1**
- **ENTERTAINMENT & POP CULTURE 2**
- **GEN Z VS MILLENNIALS 3**
- **GEN Z AS CONSUMERS 4**
- **SOCIAL OUTLOOK 5**
- **SOCIAL MEDIA & TECHNOLOGY 6**

Our strategists started out by conducting several rounds of [secondary research](#). We looked at existing news articles, academic journals, and consumer research databases including Simmons, MRI and Roper Center. In looking at existing research, our team hoped to outline previously-identified trends within Gen Z, establish questions that still needed answers, and lay the groundwork for our primary research.

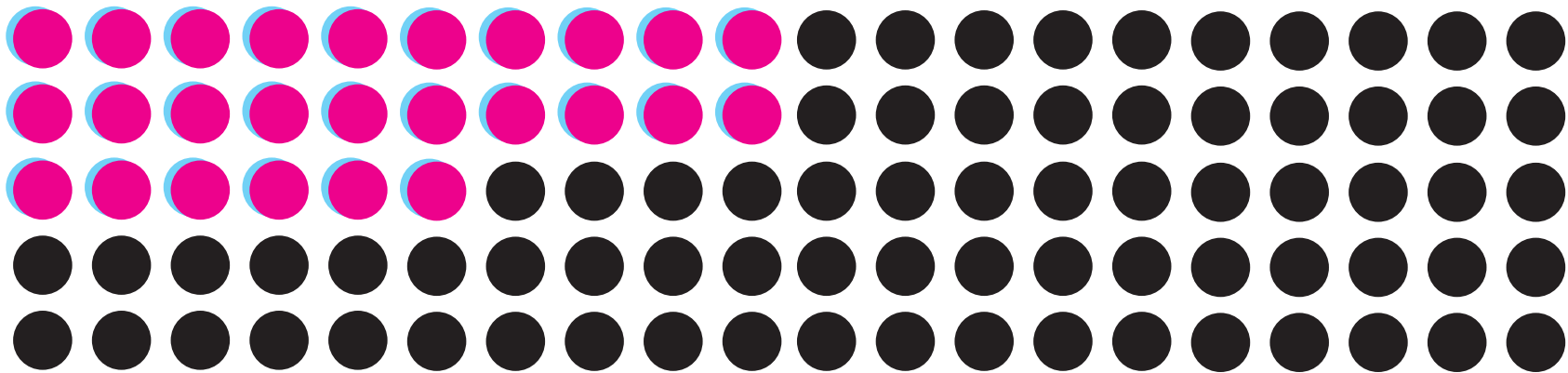
Our team then created and distributed a 38 question [survey](#) to 500+ members of Gen Z. To further expand upon these questions and better understand the underlying thinking behind the answers we received, we conducted 5 [focus groups](#) with 20 members of Gen Z as well as 12 [in-depth interviews](#) with younger members of the demographic.

As with any generation, Generation Z cannot be fully analyzed and explained through six categories. Additionally, the categories we chose are not always clearly separated and defined. Rather, they overlap, connect with, and influence one another. In its inaugural year, however, Fetch is confident that we have identified valuable patterns and trends relevant to these categories and this generation, particularly those that exist in the geographic area surrounding Athens, Georgia.

We hope our findings will help to direct business strategies that better target a group expected to be the largest generation of consumers by 2020. Our goal is to provide meaningful research findings that will collectively serve as a building block for future research into such an influential and elusive generation.

"GENERATION Z IS THE LARGEST GENERATION."

While the age range of Gen Z is currently vast and somewhat undefined, according to the *Nielsen total audience report*, Generation Z is the largest generation, accounting for 26% of all persons in U.S. homes. There are approximately 23 million members of Gen Z in the U.S., and that number is rapidly growing.



GEN Z = 26% OF PERSONS IN US HOMES



HOW OLD IS GEN Z?

There is no clearly defined year that separates Gen Z from Millennials, and academic studies widely vary in the birth years they choose to include in definitions of Gen Z. The cut-off date most often falls in the mid-to-late-1990's to the early 2000's. To ensure our data was clear and consistent, we chose to define members of Gen Z as those who were born in or after the year 1995.

#TLDR, the dates are a bit fuzzy.

GEN Z = 1995+





1: BEHAVIORAL TRENDS / Gen Z isn't what you think it is.

WORK-LIFE BALANCE.

In the workplace, Gen Z is creative, has ambitious career goals, and is sometimes overly-confident. About half of Gen Z currently works or has a part time job (48%) while half does not (52%), according to our survey. When asked to self-evaluate their work, Gen Z generally judged themselves far more positively than their older colleagues. However, older generations acknowledged that Gen Z surpassed their IT and creative skills, while members of Gen Z lacked in administrative capabilities.

What does this mean? Gen Z needs excitement in the workplace rather than monotonous office tasks. Being presented with challenges and opportunities to solve exciting problems will motivate and encourage younger members of the workforce to perform.

According to Next Generation Recruitment, Gen Z and Millennials have very different work mottos.

"Never confuse your career with your life."

vs

- Gen Z

"We are the 'always on' generation."




- Millennials





IF YOU COULD HAVE ONE WISH GRANTED, what would it be?

According to *Upfront Analytics*, 60% of Gen Z want to change the world, compared to only 39% of millennials. When asked what one wish they would like to be granted, Gen Z had a lot of ideas, many of which were [globally-minded](#). In no particular order:

- **WORLD PEACE** 
- **FINANCIAL STABILITY**
- **ENVIRONMENTALLY-FRIENDLY WORLD** 
- **HAPPINESS**
- **ALL INCLUSIVE TRIP TO EUROPE**
-  **FRENCH BULLDOG PUPPY (DUH)**
- **A LIFETIME SUPPLY OF HOME COOKED MEALS**



#FITLIFE.

It turns out Gen Z successfully balances their binge-watching with other activities, too. When asked how they spent their free time, our interviewees mentioned Netflix or watching TV just as much as they mentioned working out or playing sports. 8 out of 12 people said they frequently spent time outdoors, and 7 out of 12 exercise very regularly.



EXERCISE REGULARLY

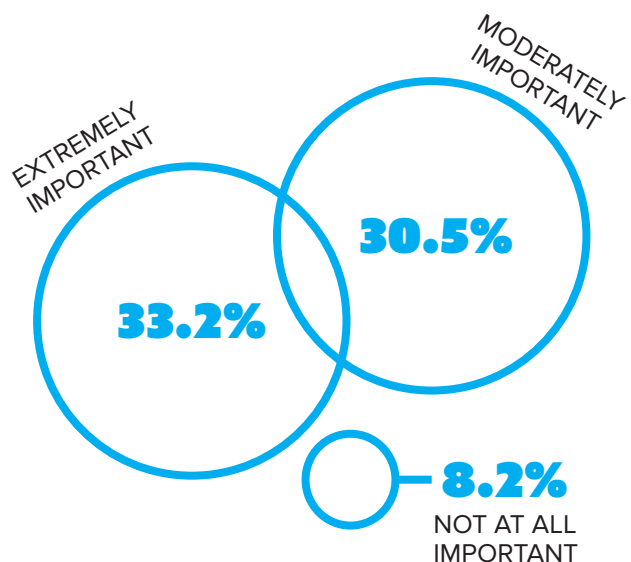
58.3%



SPEND TIME OUTDOORS

66.7%





IMPORTANCE OF EXERCISE.

63.7% of Gen Z says its extremely important (33.2%) or very important (30.53%) to incorporate exercise into their weekly routines, while 28.16% said it is moderately important. Only 8.2% of respondents believed it was not at all important.

68.5% of Gen Z sees spending time outside as important (41.6%) or extremely important (27%). Only 7% of respondents said spending outdoors was slightly important and 1.8% said it was not at all important.



CONVENIENCE.

It plays a role in purchase behavior—
just not exactly in the way we thought.

Gen Z considers it to be easier and more convenient to drive to the store to purchase something rather than waiting for it to ship and potentially dealing with product and return issues. 66% (8/12) of interviewees said they would prefer to drive to a store to purchase an item rather than to order it online and wait for it.



66%

66% PREFER BUYING IN-STORE TO ONLINE



And then there's **COMMUNICATION.**

Convenience also plays a role in how Gen Z chooses to communicate with friends. The most popular ways to communicate are arguably the most convenient ones. Despite Gen Z's reputation for being scared to pick up a phone, this generation is definitely not closed off to phone calls or face-to-face contact. From a study done by *Robert Half*, a surprising 74% of Gen Z [prefers face-to-face communication in the workplace](#). According to our survey, phone calls are the third most popular way to keep in touch with friends.

How do you prefer to stay in touch with your friends when you aren't together?

- 1 Text Message
- 2 Snapchat
- 3 Phone call

“It would just be easier to get your point across on the phone. I **would rather text them if it's someone I'm not super comfortable with.”**

- Focus group participant

3 WORD OF MOUTH.

Gen Z also rated “[word of mouth](#)” as the third go-to place to receive news. While lack of trust seems to be at an all time high, Gen Z seems to exhibit an admirable (and surprising) trust in others as news sources.





2: ENTERTAINMENT & POP CULTURE

/ when in doubt,
crack a joke



LAUGH IT UP.

Gen Z loves to laugh. In fact, when asked about the genre of television they watch most often, comedies came in first.

- **COMEDY 62%**
- **DOCUMENTARY 21.5%**
- **DRAMA 50.4%**
- **SPORTS 16.2%**
- **REALITY 24.4%**
- **NEWS 11.8%**

DRAAAAAAMA!

But we can't forget drama. Gen Z's favorite TV shows were heavy on the can't-put-down, edge-of-your-seat dramas.

- **THE OFFICE**
- **HANDMAID'S TALE**
- **THIS IS US**
- **RIVERDALE**
- **THE BACHELOR**
- **GAME OF THRONES**

MUSIC RULES THE WORLD.

Gen Z indicated that they rely so much on the joys of Spotify that they would in fact be willing to [pay for the subscription themselves](#), even though it is currently on their parents' bill.

Music is an almost constant in the lives of Gen Zers, with most members of the generation playing music while doing practically anything. They most commonly multitask listening to music with homework, eating, or looking through social media.

We don't blame them, **LIFE IS BETTER WITH A SOUNDTRACK.**



COOL?

When asked to list the top 6 qualities that make a person cool, these are most commonly used words:

- 1 FUNNY**
- 2 KIND**
- 3 LOTS OF FRIENDS**
- 4 SMART**
- 5 GOOD PERSONALITY**
- 6 FUN**

84%

of survey respondents listed being funny as a top quality of cool people. When in doubt, crack a joke. A sense of humor will go a long way in charming Gen Z and earning that “cool” status.

CELEBRITY ICONS.

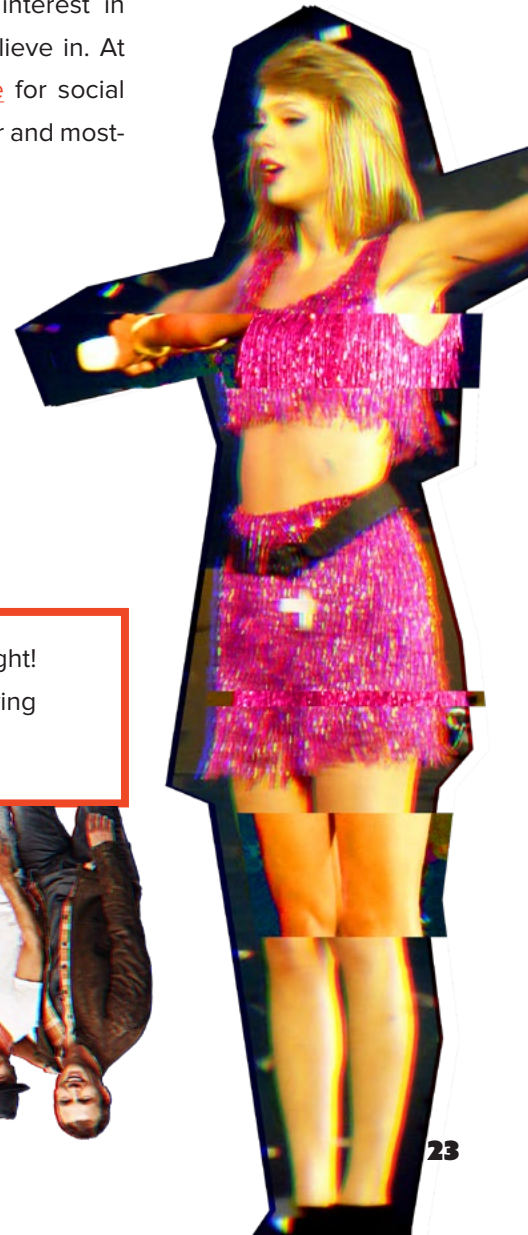
According to our secondary research, Gen Z has expressed an interest in supporting and following celebrities who stand up for what they believe in. At 20 years old, [Zendaya has been a fierce and outspoken advocate](#) for social issues, and Gen Z has definitely noticed. She's one of the most popular and most commonly mentioned celebrity influencers among this generation.

Top 7 **ICONS**

- **TAYLOR SWIFT**
- **KARDASHIANS**
- **SELENA GOMEZ***
- **EMMA WATSON**
- **ZENDAYA***
- **KYLIE JENNER**
- **MILEY CYRUS***

**Side note:* It looks like Disney Channel is doing something right! They successfully produce stars that have a major fan following years after their Disney days are over.

Even Gen Z likes the
Backstreet Boys better than
***NSYNC**... bye bye bye





An abstract graphic on the left side of the slide, consisting of several overlapping rectangular blocks of color. The colors include bright cyan, magenta, yellow, and black, arranged in a way that suggests movement and depth.

3: GEN Z VS MILLENNIALS / the older, the wiser



MILLENNIALS VS GEN Z.

Survey respondents described Millennials and Gen Z very differently. The line between these two generations is still unclear, even for the people in them. Of the top 6 buzzwords used to describe Gen Z, 8.6% of them were “[millennial](#).” Here are the 6 most popular key words Gen Z used to describe each generation:

MILLENNIALS
YOUNG ADULT
SOCIAL NETWORKING
ENTITLED
PHONES
AVOCADO TOAST
LAZY

GENERATION Z
YOUNG
SOCIAL MEDIA
TECHNOLOGY
2000'S
MILLENNIAL
KIDS



EXPERIENCES VS PRODUCTS.

According to secondary research, Gen Z prefers a [cool product](#) (60%) over a [cool experience](#) (40%). Millennials, on the other hand, prefer experiences over products (77% vs 23%).

COOL PRODUCTS

COOL EXPERIENCES

GEN Z

MILLENNIALS

THIS OR THAT?

- Gen Z is more [realistic](#), while Millennials are more [optimistic](#).
- 77% of Gen Z expects to [work harder](#) than previous generations.
- Gen Z prefers to [work alone](#), while Millennials opt for [collaborative experiences](#).
- 71% of Gen Z agrees with the phrase "If you want it done right, then [do it yourself](#)."
- 69% would rather have their [own workspace](#) than share it.
- Gen Z has a [independent](#), do-it-yourself workforce mentality .
- 96% of Gen Z is [aware of what a Millennial](#) is VS 72% of millennials knowing of Gen Z.

PATIENCE: THEN & NOW.

Gen Z'ers that are 22+ are significantly more likely to say that they are “very patient” compared to 11-17 and 18-21 year olds. In comparison, those who are 11-17 and 18-22 years old have less tolerance when things don't go their way.

22+ are very patient.

11-21 have less tolerance when things don't go their way.





**"I LIKE TO TRY
NEW THINGS."**

A significant amount of [Gen Z](#) is likely to agree with these two statements.

**"I ENJOY
TAKING RISKS."**





4: GEN Z AS A CONSUMER / brand baby, brand



GEN Z PAYS ATTENTION.

58.69% of our survey respondents followed brands on social media. Those aged 11-17 were **more likely to follow 11+ brands** on social media, compared to 18-21-year-olds. Both groups, however, were the most likely to follow 3-5 of their favorite brands across social media platforms

FOLLOWERS

NOPE

58.69% FOLLOW BRANDS

GIRLS & GUYS.

Males follow brands on social media because they're entertaining, funny and have a personality. Females follow brands on social media because they post about current events, are up to date on pop culture, and offer promotions.

GUYS

- **ENTERTAINING**
- **FUNNY**
- **PERSONALITY**

GIRLS

- **CURRENT EVENTS**
- **POP CULTURE**
- **PROMOTIONS**

FOLLOWERS DON'T EQUAL LOYALTY.

66% of interviewees followed brands on social media as well as 58.7% of survey respondents. However, they didn't feel that following these brands influenced their purchase decisions. Only 42% of interviewees said that following brands or companies influence purchases they made.

Gen Z also doesn't feel loyal to one brand, with 83% of interviewees saying they did not consider themselves to be brand loyal.

YES

NO

"FOLLOWING BRANDS INFLUENCES MY PURCHASES"

TOP 3 BRANDS.



NIKE

patagonia

PATAGONIA



APPLE

63% said an Apple product was their first memory of technology.

ARE YOU BRAND LOYAL?

"No, I'm wearing Nike shorts and Adidas shoes right now—so, no."

- 18 y/o Gen Z

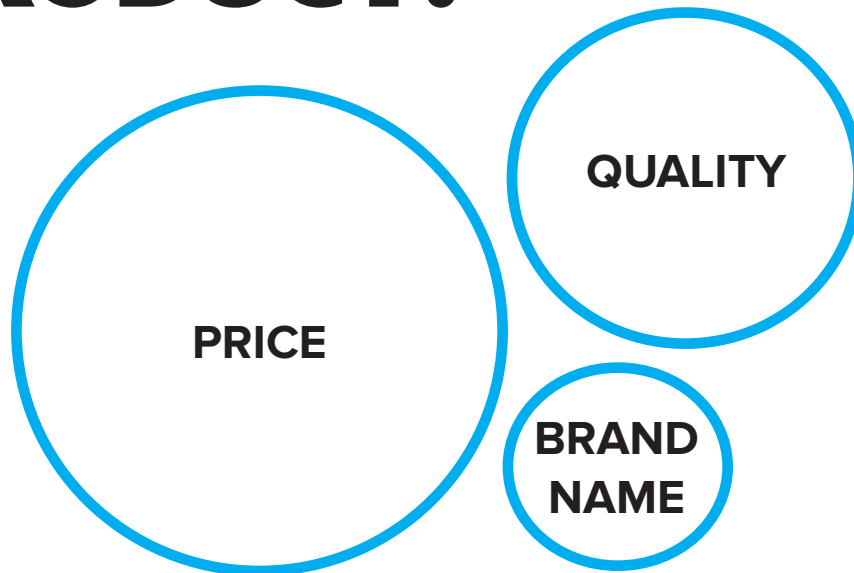
"Yes, GMC, Under Armour, Nike, Adidas."

- 17 y/o Gen Z

These quotes show a disparity in Gen Z's understanding of what "brand loyalty" means. One considered the fact that he liked both Nike and Adidas as proof that he was not brand loyal, while the other believed he was brand loyal to both.



MOST IMPORTANT FACTORS CONSIDERED WHEN PURCHASING A PRODUCT:



Gen Z is also much more willing to make purchases when a product has a cool design and aesthetic or is technologically innovative.





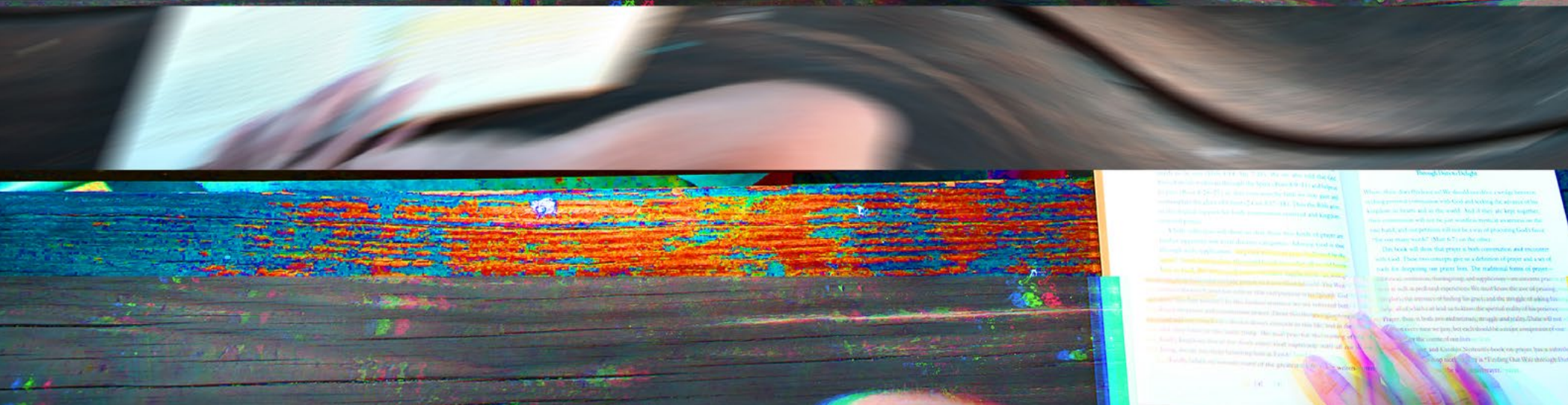
TRUST IN COMPANIES?

Gen Z lacks trust in most companies and organizations and collects information about products before purchasing. When choosing whether to buy a product, Gen Z values advice from family and friends first.

- **FAMILY 1**
- **FRIENDS 2**
- **CELEBRITIES 3**
- **SOCIAL MEDIA INFLUENCERS 4**

Gen Z is also highly prone to escapist consumer behaviors:

- **MUSIC 1**
- **MOVIES 2**
- **VIDEO GAMES 3**
- **DINING OUT 4**





5: SOCIAL OUTLOOK / life's a beach

SUPPORTING CAUSES.

Price & Convenience > Ethical Consumption

Gen Z doesn't typically think about taking action by standing up for a cause or participating in a movement, but rather they think monetary support when it comes to social action.

While the majority of those interviewed paid attention to social issues, only 16% actually took action related to these issues.

16% TOOK ACTION

Many of those who didn't take action said it was because they aren't in a position to donate money.

"Yes, I pay attention to social issues, but no, I don't take action. How would I? What am I going to do? I don't have money to donate." - 18 y/o Gen Z



SOCIALLY RESPONSIBLE PURCHASES.

While Gen Z is aware of social issues, they're basing most purchase decisions off price and convenience. If anything, Gen Z is more inclined to support companies they agree with than stop supporting ones they disagree with.

"There needs to be less of boycotting a brand and more of supporting the good ones."

- Focus Group Participant

"If I were going to look for complete ethical consumption, then it would be impossible to stay modern."

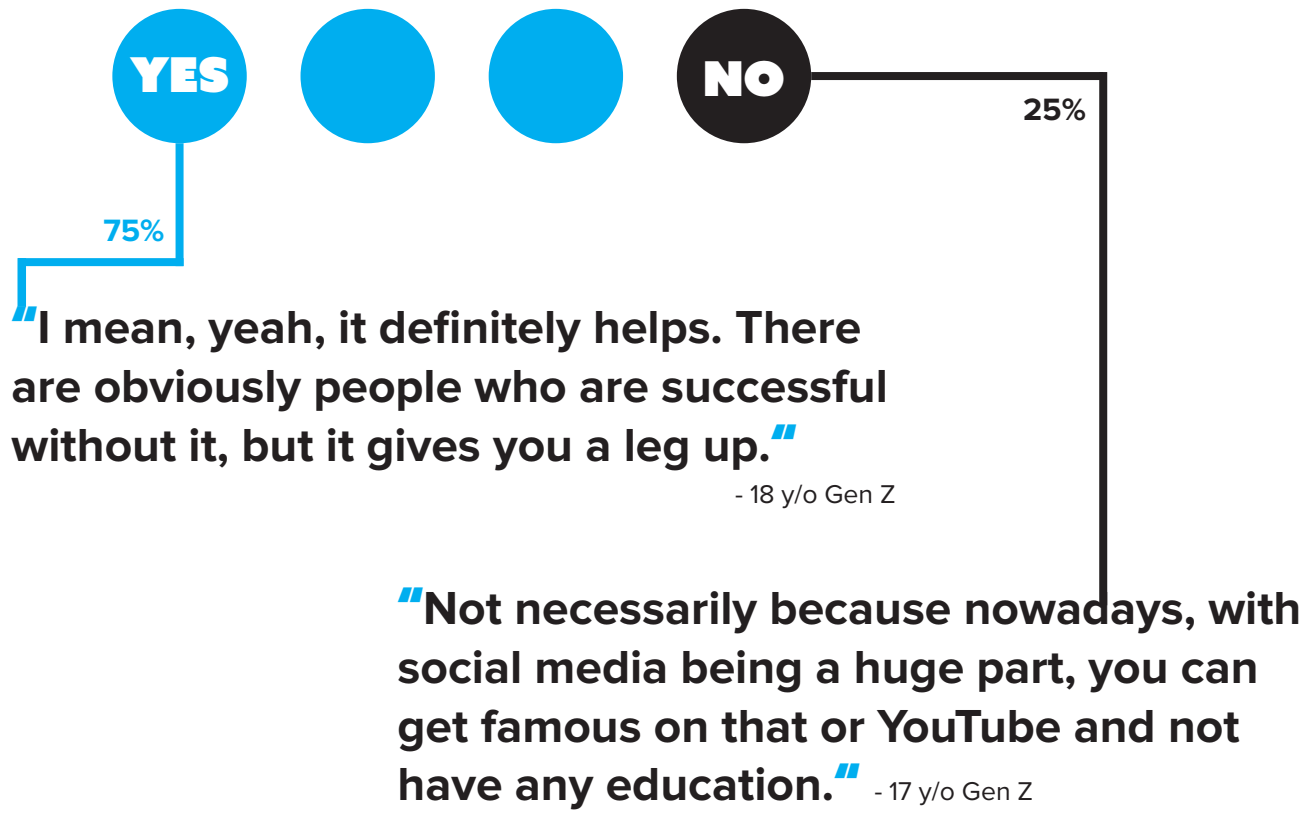
- Focus Group Participant

"It's kind of 'don't ask, don't tell'—I want a good product and sometimes don't want to think about it."

- Focus Group Participant



IS COLLEGE NECESSARY TO SUCCEED?









6: SOCIAL MEDIA & TECHNOLOGY / kids these days...

SUBGROUPS WITHIN GEN Z **LARGELY DIFFER** IN HOW THEY INTERACT WITH & USE SOCIAL MEDIA IN THEIR DAILY LIVES.

Social media platformed **RANKED**
from most to least essential:

11 - 17 Y/O

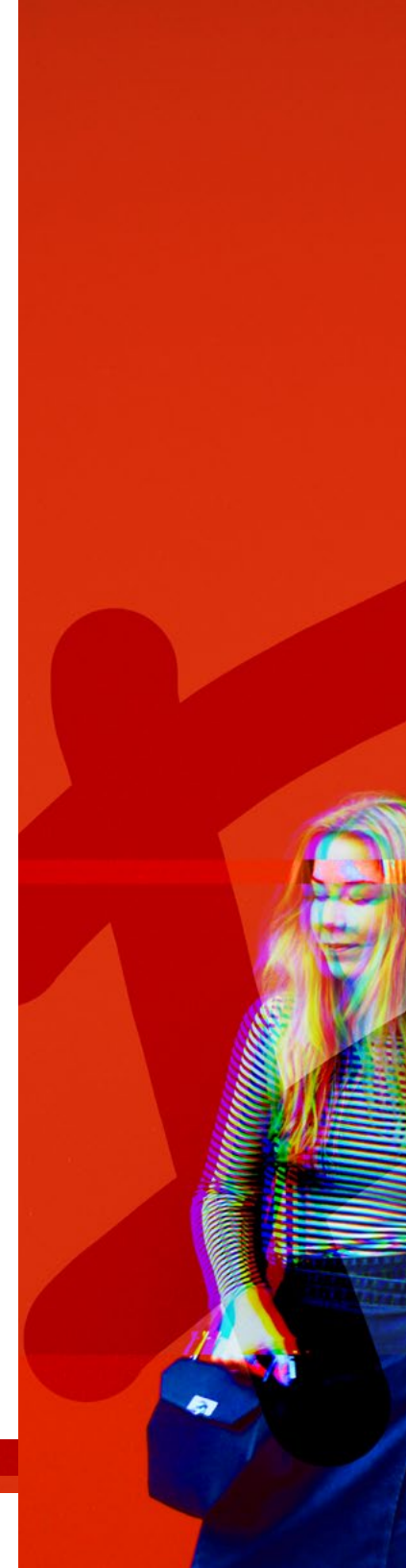
Snapchat
Instagram
Twitter

18 - 21 Y/O

Snapchat
Instagram
Facebook

22 + Y/O

Facebook
Instagram
Twitter



Facebook is dead. **IS TWITTER DYING TOO?**

Although 0% of 11-17 year olds ranked Twitter as the most essential social media in their daily lives, the social media platform still plays a strong role in the daily lives of older members of Gen Z.

Twitter “is... my source of primary news as soon as an event happens.”

- 18 y/o Gen Z

0%

11-17 y/o ranked Facebook as **MOST** essential

62%

11-17 y/o ranked Facebook as **LEAST** essential

SNAPCHAT IS THE MOST IMPORTANT SOCIAL MEDIA.

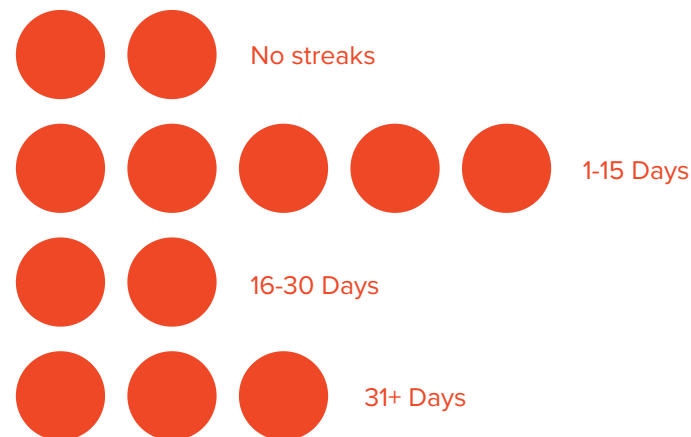
"I can see what's going on in the world around me." -16 y/o Gen Z

60% of survey respondents between the ages of 11-17 chose snapchat as their most essential app, and 62% also said that the number one way they receive their news is via Apps/Notifications. Snapchat is incredibly important to most members of Gen Z because it's quick, easy to use, and all of their friends use it. The time-bound feature of Snapchat also appeals to this group, as their content goes away and doesn't follow them around forever.

SNAPCHAT STREAKS

A streak refers to two users snapchatting each other for a consecutive number of days. 83% of respondents had at least 1 snapchat streak going. Three had at least 40-day streaks, with 648 days being the longest one we encountered.

Longest streak? **717 DAYS**





INSTA-FAMOUS

The 11-17 age group is more likely to say that being Instagram famous is something for which to strive. The 18-22 group, however, is extremely unlikely to agree.

DO YOU HAVE ANXIETY, AND DOES IT AFFECT YOUR USE OF SOCIAL MEDIA?

YES

NO

The majority of interview respondents acknowledged that while social media can **NEGATIVELY IMPACT MENTAL HEALTH,** it did not personally affect them in this way.

“Social media can be really toxic to people with mental issues because when you’re struggling with body positivity and then you see heavily edited photos and models on social media, it definitely intensified that and makes it worse and makes you feel bad about your appearance.”

- 17 y/o Gen Z

“I personally am not very affected by what I see on social media but... I have friends that I think that social media use is detrimental to their emotional and mental health.”

- 18 y/o Gen Z





& IN CONCLUSION

/ impact and limitations

LIMITATIONS.

While our team believes we have uncovered valuable insights about Gen Z that businesses and brands can use to better understand this group, our research methods and findings did have a number of limitations that researchers and strategists should consider when conducting future research on this topic.

Population Size and Demographics: Our research was conducted on a small percentage of the Gen Z population, with approximately 570 members of Gen Z taking part in our survey, focus groups, and in-depth interviews combined. Additionally, the majority of our participants were white, college-aged women, potentially skewing the data and trends we identified. Future researchers should seek to target a more diverse Gen Z population to uncover more comprehensive and representative insights.

Geographical Limitations: Due to the agency's location and the resources available to us, the data we gathered was limited to the South, and more specifically, Athens, Georgia. Future research should seek to uncover the thoughts and behaviors of Gen Z in other locations, and compare data to see whether patterns and similarities emerge between members of Gen Z in vastly different regions..

Lack of Prior Research: While a number of articles and studies have been written about Generation Z, there is relatively little research available compared to other generations. Generation Z is somewhat of a new research subject, as its members have just begun entering the workforce and gaining buying power. As Gen Z begins to make a more noticeable and significant impact on the market, we expect the amount of available research about this group to rapidly expand, revealing more diverse and comprehensive information about Gen Z and further strengthening these beginning findings.





LOOKING INTO THE FUTURE.

Gen Z often gets tied in with Millennials and assigned stereotypes of the generation before them. In reality, Gen Z is a [shockingly unpredictable and unique group](#).

“They are active global citizens who interact with people and cultures across the globe.”

Despite being born into and surrounded by advanced technology and the internet, members of Gen Z don't hole up inside or hide behind their devices as many expect them to. Gen Z is eager to get outside and communicate face-to-face with others, and they are active global citizens who interact

with people and cultures across the globe, seeking to understand them. Gen Z is the [most accepting generation to date](#) and is welcome to diverse ideas, lifestyles, and people.

They place a lot of weight in knowing what is going on in the world and [care about making a difference](#) and impacting communities. While the avenues by which they do so may not look like traditional activism, they make it known where their support and values lie by seeking out brands and celebrities that make a difference.

Gen Z defies expectations, and with more power at their fingertips than any generation before them, they aren't going to stop challenging social norms any time soon.

The question is: **WHAT WILL THEY DO NEXT?**





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Simmons OneView

