

think with Google™

Generation Z

New insights into the mobile-first mindset of teens

Methodology

To help marketers better understand the digital behaviors of GenZ (13- to 17-year-olds), and how they compare to older generations, Google and Ipsos teamed up for this research report.

Format	Survey via online panels by Ipsos
Population	Sample representative of online population 13 to 17 (classified as all teens), 18 to 24 (classified as young adults), 25 to 34 (classified as adults).
Sample Size	2,013
Market	U.S.
Fielding Date	August 2016

Key Findings

1 First phones are a major milestone.

Getting a phone is one of the most important life events for GenZ. And they are younger than ever when they get them. Today's teens got their first phone when they were around 12.

2 Video rules on mobile.

Across all age groups, more time is spent watching online video on their phones than any other smartphone activity, but teens watch the most. Seven in 10 teens say they spend more than three hours per day watching mobile video.

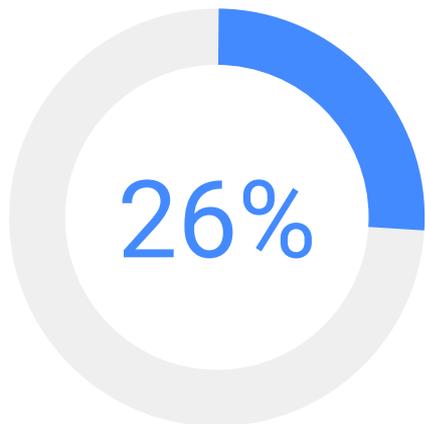
3 GenZ are mobile shoppers.

Two in three teens make purchases online and of those, more than half are making purchases on their phones.

4 GenZ stays connected.

GenZ craves connections with others—and not just in person. Texting is the preferred way to connect with others, followed by messaging apps.

GenZ represents a large—and valuable—segment of the population



 GenZ represents more than
¼ of the U.S. population



 Annual U.S. purchasing
power of GenZ

For teens, getting a new phone is a life-changing event

Top milestones for teens

- 1 Graduating from school
- 2 Getting a license
- 3 Getting a phone

“ When I got a phone, it was really important socially. It was like, oh my gosh, you’re accepted now. Everyone wanted to be your friend because you got a new phone. ”

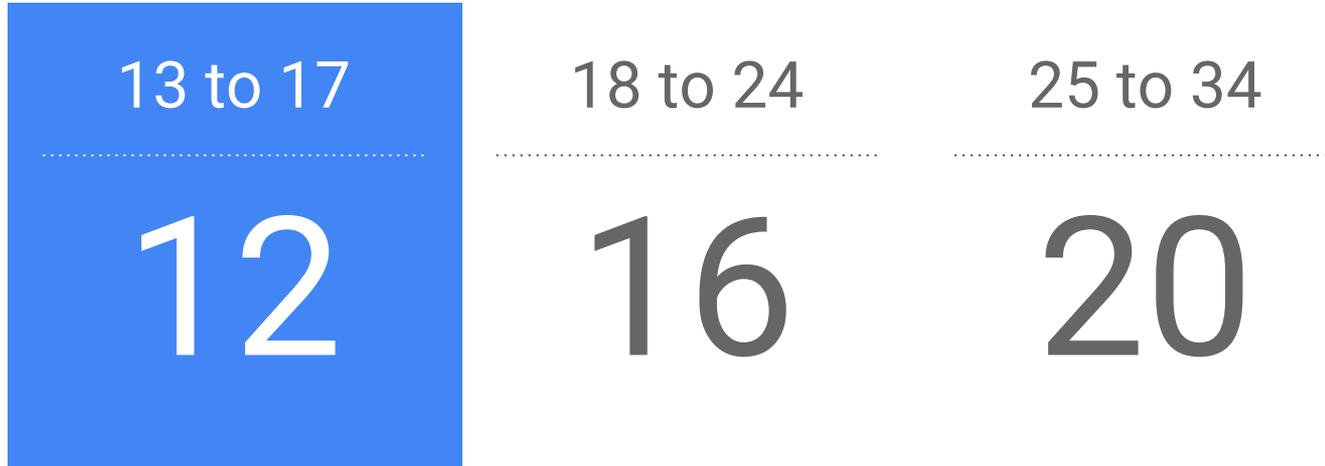


Cyan, 17

16 Which of the following was the most important in your life until now? Please select one. 'Graduation from school' includes: Graduating college, graduating high school, graduating middle school, getting a master's degree
Base: All respondents 13-17 (428), 18-24 (581), 25-34 (1004)

And they are getting them earlier than previous generations

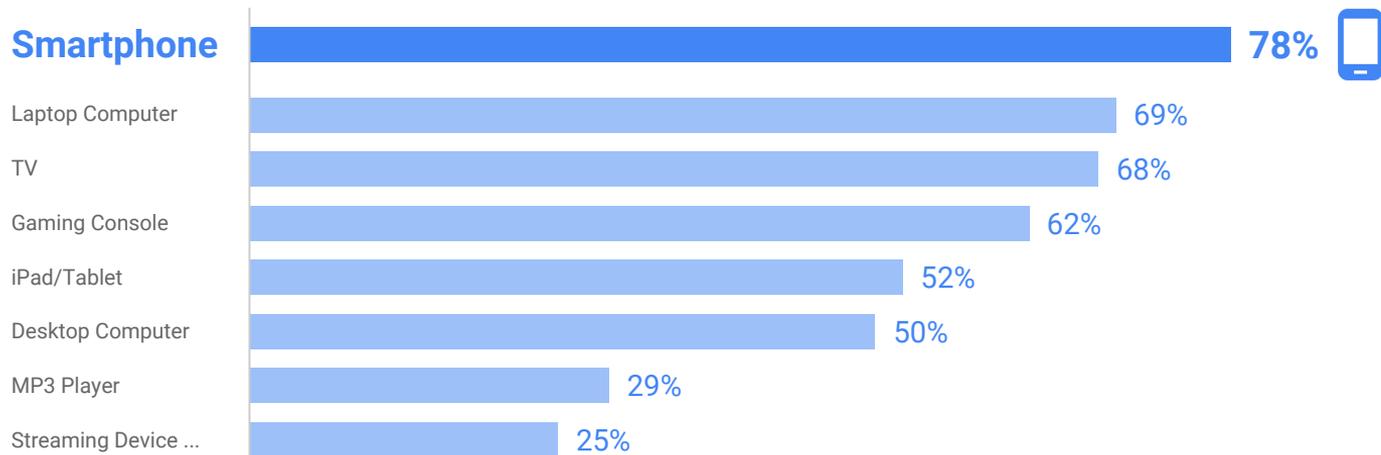
Median age at which respondents report getting their first phone



Source: M2 At what age did you get your first smartphone? Please type in the age you were below.
Base: All respondents 13-17 (428), 18-24 (504), 25-29 (449), 30-34 (429)

While Teens have more devices than ever at their disposal, phones are the most-used

Most-used devices for 13- to 17-year-olds

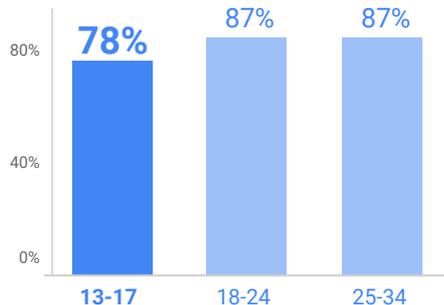


M1 Which devices do you currently use? Please select all that apply
Base: All respondents 13 to 17 (428), 18 to 24 (267), 25 to 34 (314)

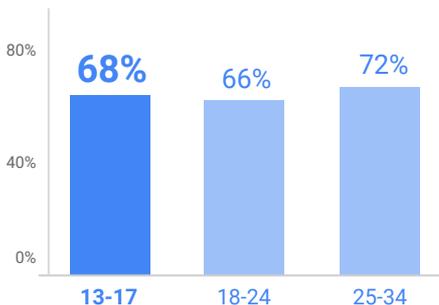
Despite being the most-used device for teens, more 18- to 34-year-olds use phones. Compared to their older counterparts, gaming consoles play a big role in teens' lives.



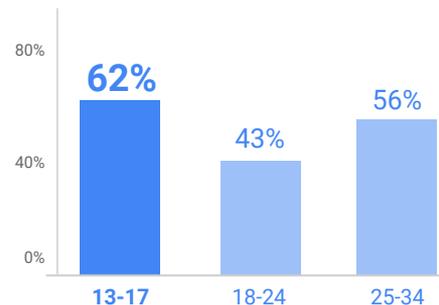
Smartphone Usage by Demographic



TV Usage by Demographic



Gaming Console Use by Demographic

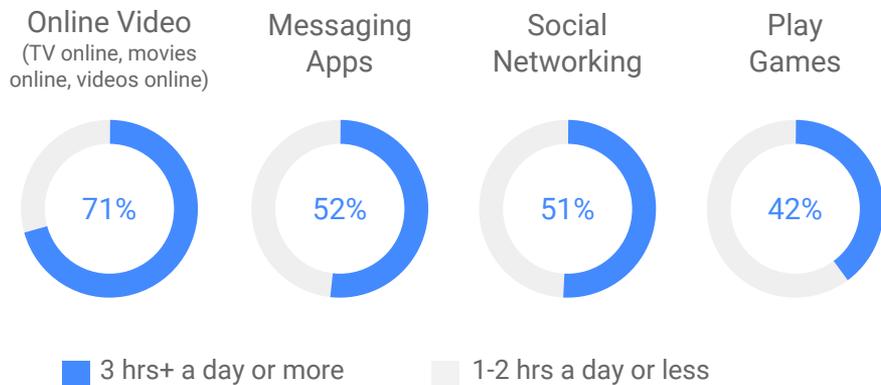


M1 Which devices do you currently use? Please select all that apply.
Base: All respondents 13 to 17 (428), 18 to 24 (267), 25 to 34 (314)

Phones connect and entertain today's teens

More teens spend 3+ hours watching video on their phones every day than any other activity

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

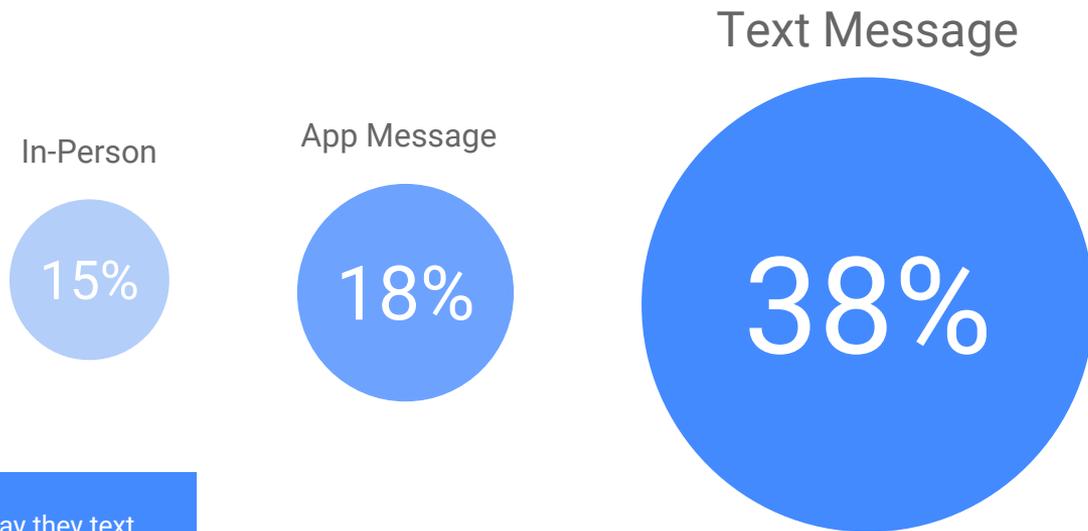


“ Our generation is taking way too many selfies and staying up all night watching videos. Some of my friends only sleep for three hours, and they still go to school the next day. I kind of think it’s normal because I do that too sometimes. ”

Andrea, 14

Source: M3a How often do you use your smartphone on an average day to do the following? Select one per activity.
Base: Those who use a smartphone on M1—base varies by activity
Phone interviews with 11 teens, U.S., Dec. 2016

Teens prefer to connect with people via text more than twice as much as messaging apps or in-person



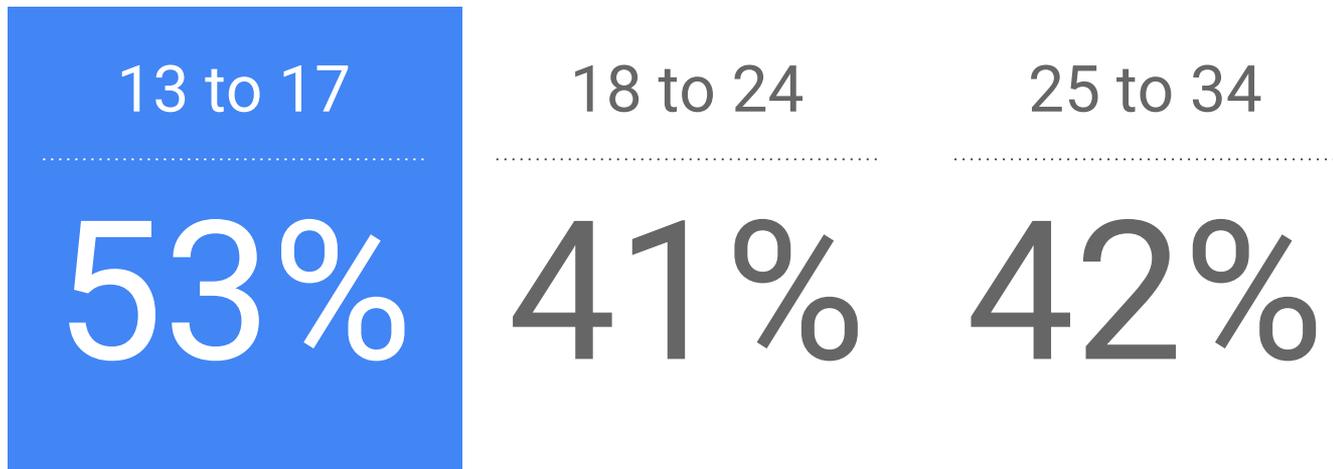
FUN FACT

Nearly 3 in 10 teens say they text with people who they are physically with at the time.

C1, C2 How do you get in touch with someone ... what's your preferred one? Please select one.
Base: All respondents 13 to 17 (428), 18 to 24 (581), 24 to 34 (1004)

For teens, social media followers equal social currency

% Who Agree: "The number of followers/subscribers I have on my social channels is important to me."



B18 Thinking about social media, how much do you agree with the statements below? SR per statement.
Base: All respondents 13 to 17 (428), 18 to 24 (581), 25 to 34 (1004)

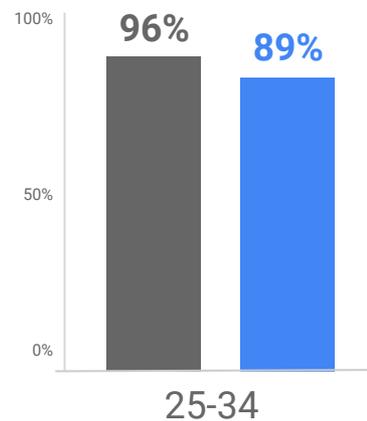
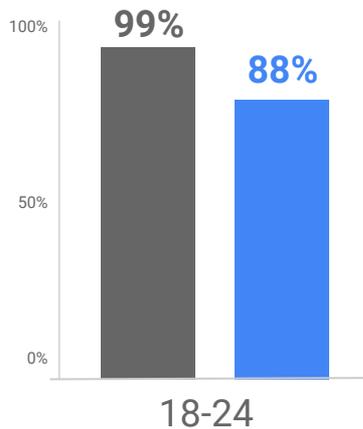
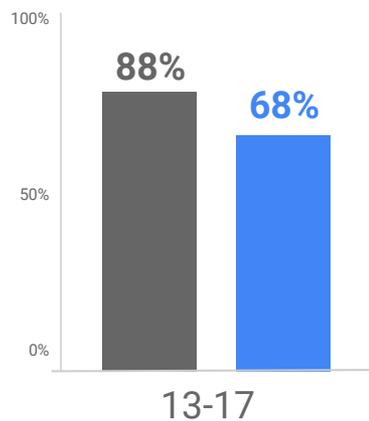
2 in 3 teens are already making purchases online



Purchase in-store



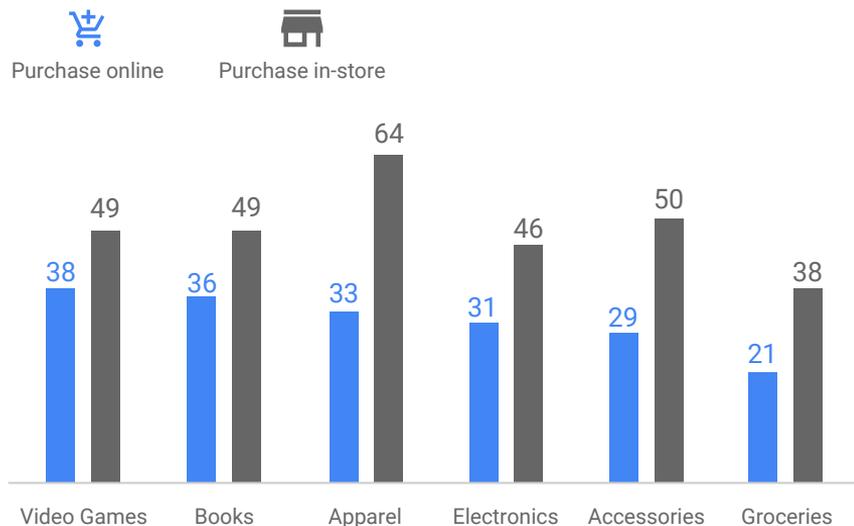
Purchase online



S1_bis For each type of product, which of the below best describes you? Please select all.
Base: All respondents 13 to 17 (487), 18 to 24 (581), 25 to 34 (1004)

Video games, books, and apparel are the most common products teens buy online

13-17s in-store and online purchases



S1_bis For each type of product, which of the below best describes you? Please select all.

Base: All respondents 13 to 17 (487), 18 to 24 (581)

Phone interviews with 11 teens, U.S., Dec. 2016

“ If there's something I know I want, I get it online. ”

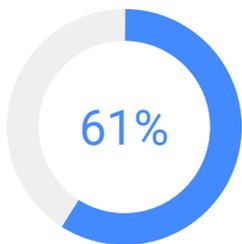


Grace
age 13

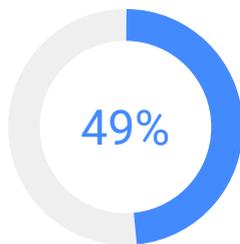
For teens, online shopping eliminates friction

Reasons teens shop online¹

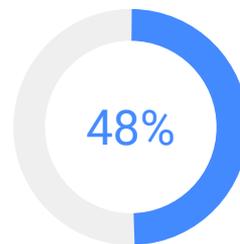
It's more convenient



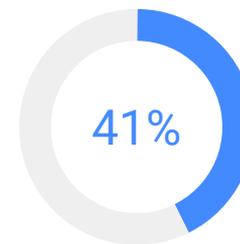
I can find better deals online



It allows me to see multiple brands and retailers without leaving home



It's faster than going to physical stores



FUN FACT

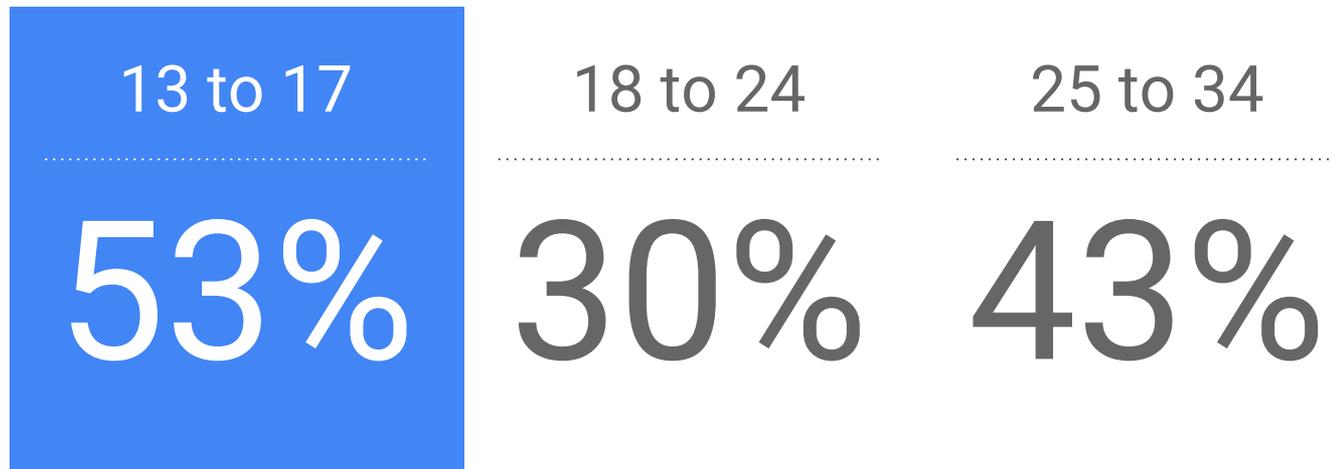
64% of teens say that images they see online influence products they purchase²

1. S1b. What are the main reasons you choose to shop online? Please select all that apply. Base: Online Shoppers 13 to 17 (286)

2. C7 How much do you agree/disagree with the following statements? Base: All respondents 13 to 17 (428)

And when it comes to shopping, teens are truly mobile first

% that mostly use smartphones to make online purchases



S3. When you buy something online, which device do you mostly use? Please select one.

Base: Online Shoppers 13 to 17 (289), 18 to 24 (510), 25 to 34 (894)

For teens, ads impact a product's “cool” factor

Aspects that make a product “cool”

- #1 If friends are talking about it
- #2 If I see an ad about it
- #3 If it's something personalized to me

“ When someone your age is doing something in the ad or it pertains more to you personally, those strike me. ”



Cyan, 17



It's Lit

a guide to what teens think is cool

Google

Teens say something is cool if it's unique, impressive, interesting, amazing, or awesome.

Which brands fit the bill?

Find out in our new report

It's Lit: A Guide to What Teens Think Is Cool

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