JWT | GEN Z:

DIGITAL IN THEIR DNA

April 2012

Image credit: Spree2010

WHAT WE'LL COVER

A note to readers: To make the report easy to navigate, we've added hyperlinks to this page and throughout the report, so you can jump immediately to the items that most interest you (or, alternatively, you can read the material straight through).

INTRODUCTION

Gen Z is the fledgling generation, born after 1995, that follows the Millennials (definitions of Gen Z vary, with some considering the year 2000 as its starting point). This generation can be considered the first true mobile mavens. They will take for granted a world of smartphones, tablets and high-speed wireless Internet, untethered from the constraints of a landline or a traditional Internet connection. They won't distinguish between online and offline, since their mobile devices will keep them connected most of the time. This will create a unique mindset, especially when it comes to accessing information.

Even the youngest are attuned to new devices, with some toddlers attempting to treat magazines like iPads and TVs like touch screens. So Gen Z will be tech-fluent in many ways, and certainly more connected than any generation before it. One consequence will be a multicultural and globally oriented mindset—even more so than the Millennials that preceded them. Kids are already Skyping with friends and family on the other side of the globe. A quarter of Gen Z participants in this study said all or most of their social-network friends live a plane journey away. Expect even more linguistic and cultural borrowings and consistencies across nations and regions.

This report, based around a survey of Gen Z consumers and their parents in the U.S. and the U.K., provides a snapshot of the generation by focusing on their digital habits: how they use connected devices to socialize, spend, shop and more. With some kids today claiming a digital presence even before birth—23% of parents with children younger than 2 have published sonograms online—we propose that this group has digital in its DNA.

METHODOLOGY

JWT's "Gen Z: Digital in their DNA" is the result of quantitative, qualitative and desk research conducted by JWTIntelligence throughout the year. Specifically for this report, we conducted a quantitative study in the U.S. and the U.K. using SONAR™, JWT's proprietary online tool, from March 1-3. We surveyed 400 adults, 200 children aged 8-12 and 200 teenagers aged 13-17 (data are weighted by age and gender).

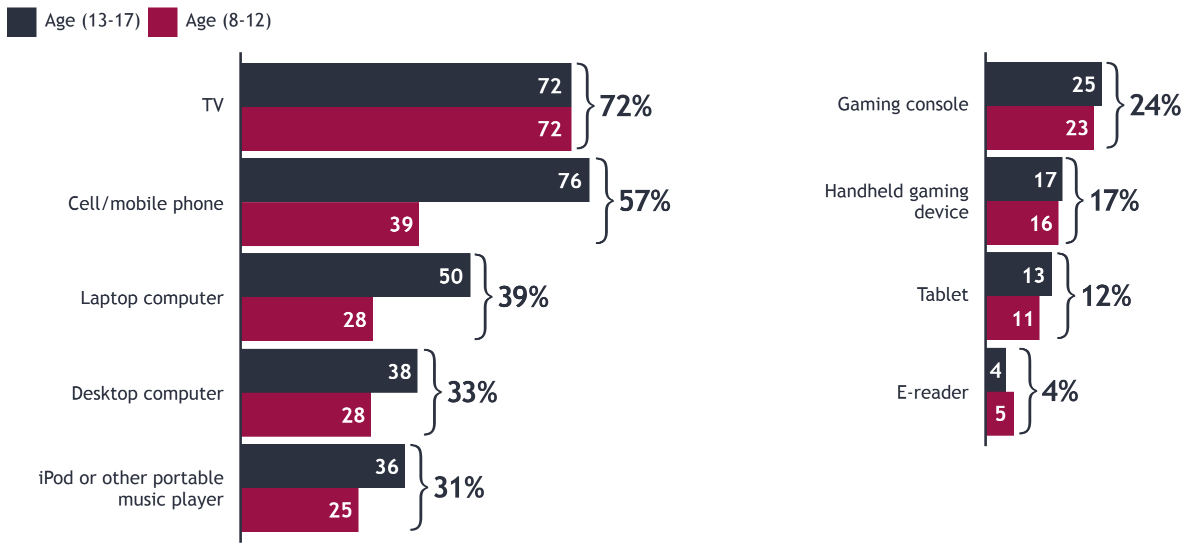
GEN Z

Image credit: chaoss

FIGURE 1A:

Always attached to technology (U.S. and U.K.)

Percentage who use the following devices multiple times per day



Gen Z is growing up with a range of electronic devices at hand. Not surprisingly, the key device for teens is the mobile phone, and 4 in 10 tweens also use a mobile frequently. Today's phone serves as an Everything Hub, perhaps the reason that relatively low percentages are using portable music players and handheld gaming devices multiple times per day. Some things never change, though, with most kids turning to TV sets on a regular basis.

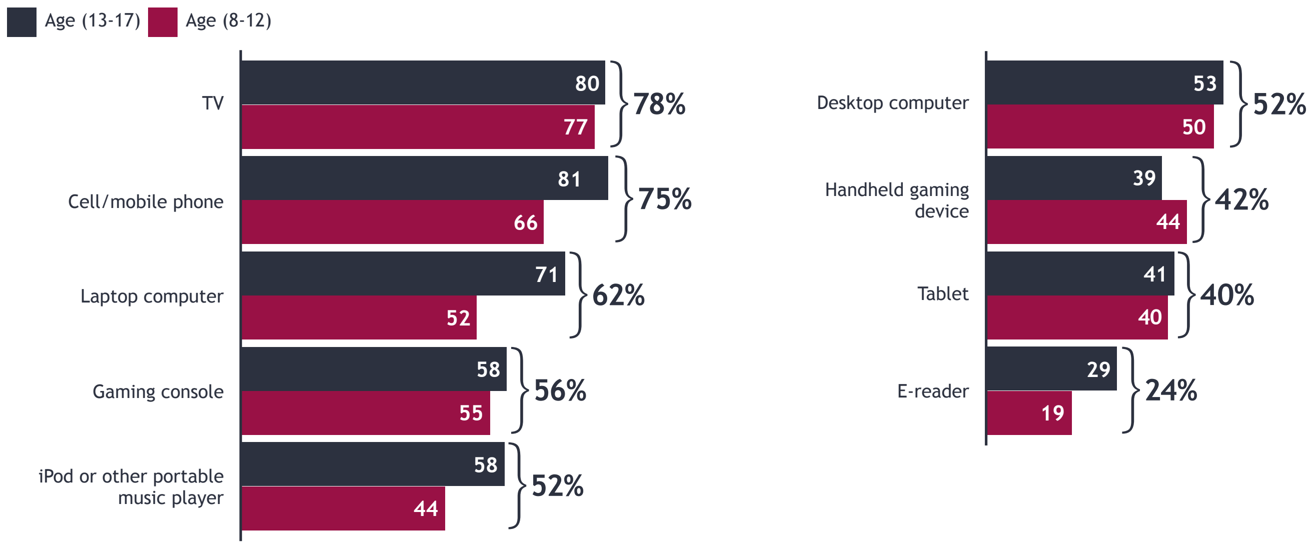
For country breakdowns, see Appendix, Figures 1F-G.

EMOTIONALLY ATTACHED TO DIGITAL DEVICES

FIGURE 1B:

Relationships with their devices (U.S. and U.K.)

Percentage who would miss the following devices a lot if they were taken away



Gen Z tends to regard most electronic devices as important, whether or not they are used frequently. Just 12% use tablets multiple times per day, for instance, but 40% say they would miss the device a lot. The two most commonly used devices—mobile phones and television—are the ones that would be missed the most.

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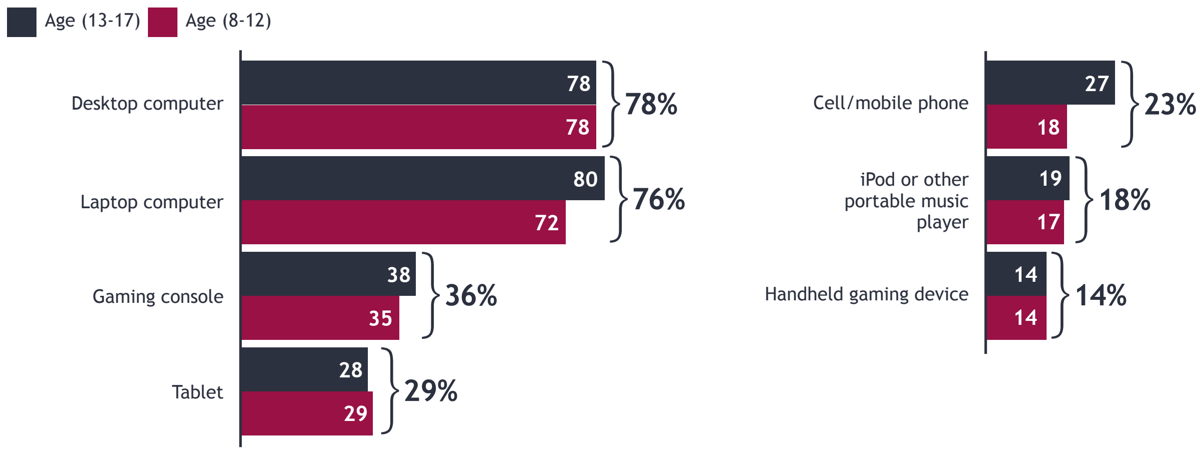
For country breakdowns, see Appendix, Figures 1H-I.

INTERNET ACCESS MOSTLY VIA COMPUTER

FIGURE 1C:

Internet access options (U.S. and U.K.)

Percentage who use the following devices to access the Internet



Gen Z is most likely to access the Internet using laptop or desktop computers. As this generation grows more dependent on the mobile device, however, expect them to turn to smartphones with increasing frequency to check social networks and email, shop and surf the Web.

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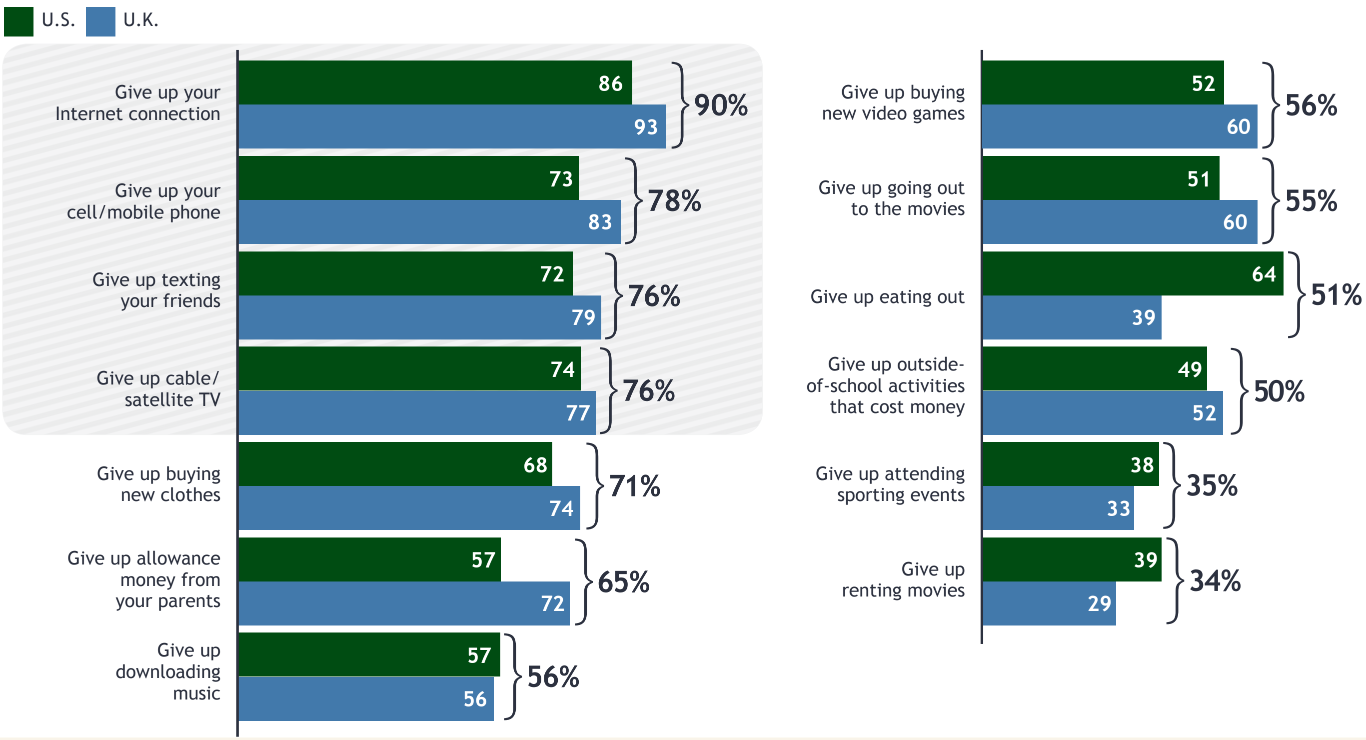
For country breakdowns, see Appendix, Figures 1J-K.

DIGITAL CONNECTIONS TRUMP MONEY, MUSIC, MOVIES…

FIGURE 1D:

Reluctance to disconnect (U.S. and U.K. age 13-17)

Percentage who would be upset if they had to give up the following



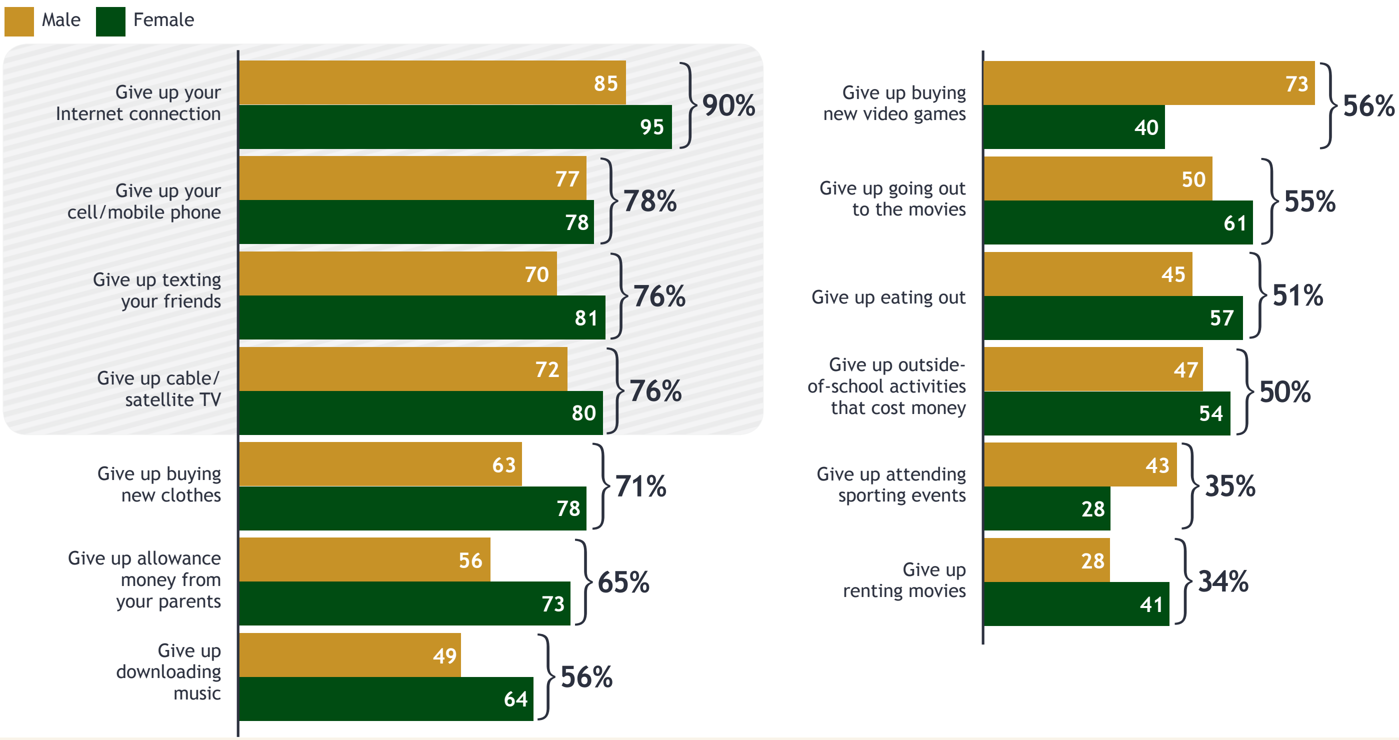
For Gen Z, digital connections with the world, and with friends in particular, are essential. They value Internet connections, mobile phones and the ability to text friends more highly than allowance money and some material goods, and significantly more highly than real-world activities like going to the movies, eating out or attending sporting events.

...ESPECIALLY FOR GIRLS

FIGURE 1E:

Reluctance to disconnect (U.S. and U.K. age 13-17)

Percentage who would be upset if they had to give up the following



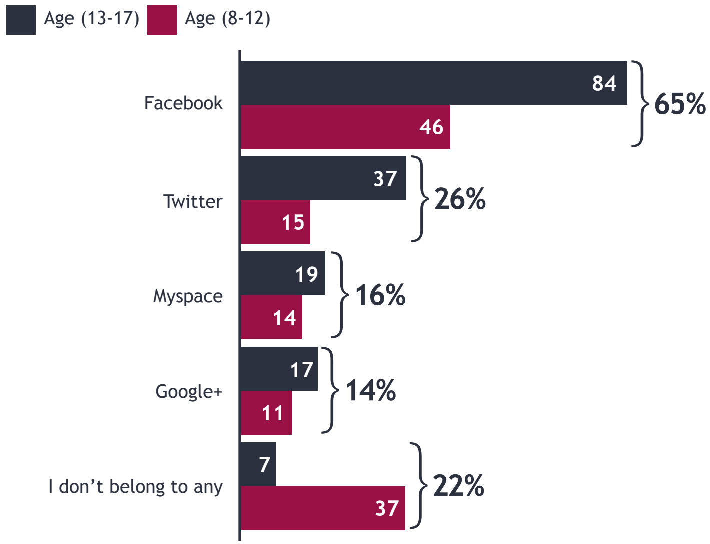
Girls generally feel stronger about giving up things than boys: Almost all girls (95%) would be upset if they had to give up their Internet connection, 10 points ahead of boys; a similar gap separates the percentage of girls vs. boys who would be upset about giving up texting friends. Two areas are a clear exception: video games and sporting events.

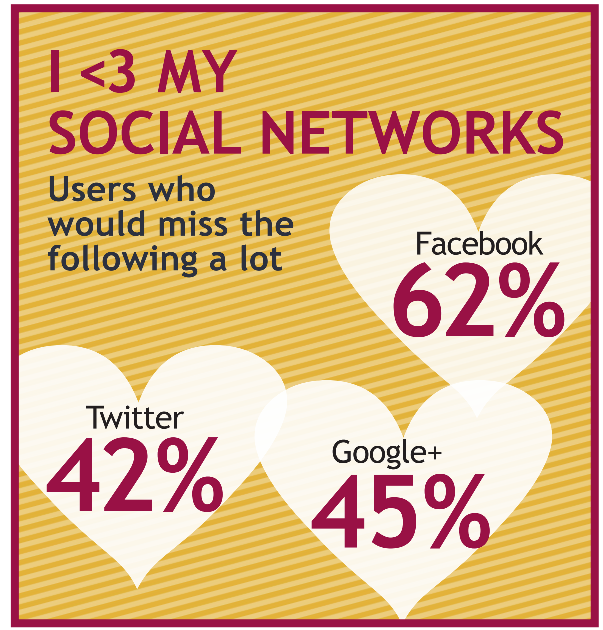
LEGALLY OR NOT, FACEBOOK'S THE PLACE TO BE

FIGURE 2A:

Social networks (U.S. and U.K.)

Percentage of respondents who belong to the following social networks





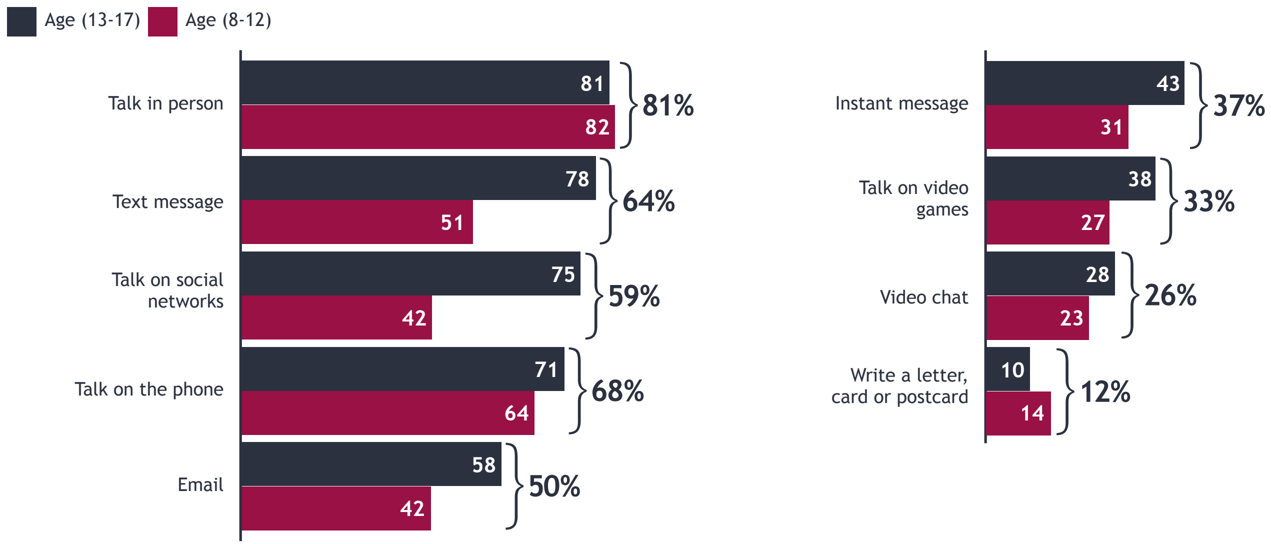
For most teens, Facebook is a fact of life. A few other social networks factor in as well—more than a third of teens are on Twitter—with only a tiny percentage opting out of these digital networks altogether. Facebook and most other social networks require members to be at least 13 years old, but tweens want in as well, and almost half say they are using Facebook.

CONSTANTLY CHATTING, OFTEN ONLINE

FIGURE 3A:

Constant contact (U.S. and U.K.)

Percentage who have done the following in the past few weeks with friends



This hyper-connected generation communicates with friends in old and new ways. The phone is used both to talk and to text, with online chatting an additional popular way to communicate. This is done via instant messenger and tools like Facebook Messenger, especially as teens move their social life to social networks.

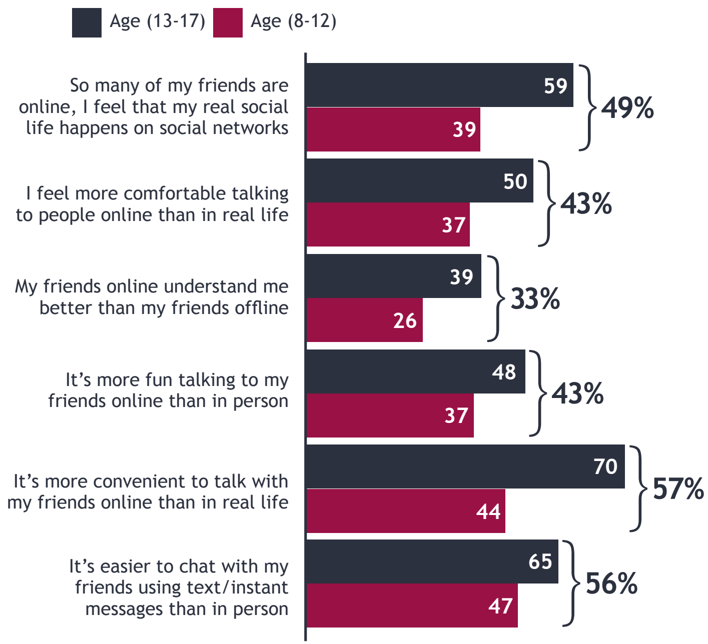
For country breakdowns, see Appendix, Figures 3C-D.

MORE AT EASE SOCIALIZING ONLINE THAN OFFLINE

FIGURE 3B:

Online vs. offline socializing (U.S. and U.K.)

Percentage who agree with each of the following



FRIENDS IN FAR PLACES

Percentage who would need to fly to visit most or all of their social network friends: 26%

With so much of Gen Z's social life centered around the digital domain, and so many friends connected to Facebook and reachable by text, significant percentages prefer socializing online than in real life. More than half say it's easier to chat digitally, or more convenient. And around 4 in 10 are more comfortable talking to people online and find it more fun. On most of these counts, boys are a little more likely than girls to prefer digital communication.

For country breakdowns, see Appendix, Figures 3E-I.

SPENDERS FIRST, SAVERS SECOND

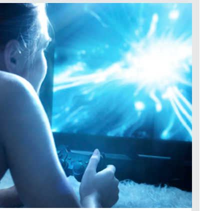


FIGURE 4A:

Spenders and savers (U.S. and U.K.)

Percentage who like to do the following with their money

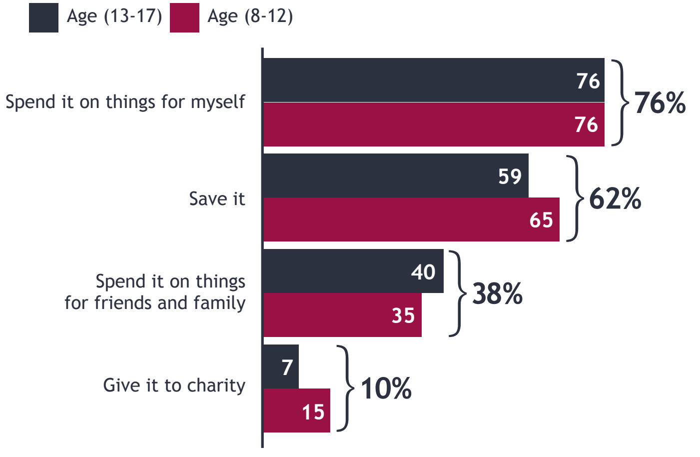
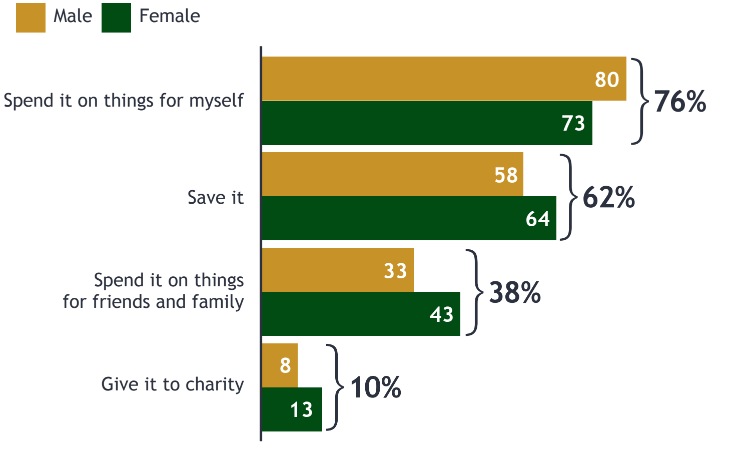


FIGURE 4B:

Spenders and savers (U.S. and U.K.)

Percentage who like to do the following with their money



Members of Gen Z tend to spend on themselves, with girls slightly more cautious than boys. Girls are more likely to save their money or spend it on friends and family.

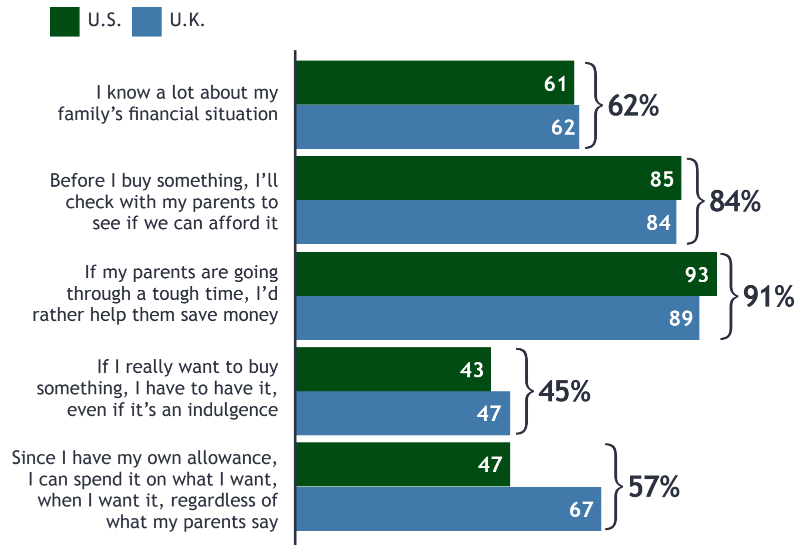
For country breakdowns, see Appendix, Figures 4F-I.

SENSITIVE TO FAMILY'S FINANCIAL SITUATION

FIGURE 4C:

Considerate consumers (U.S. and U.K. age 13-17)

Percentage who agree with the following



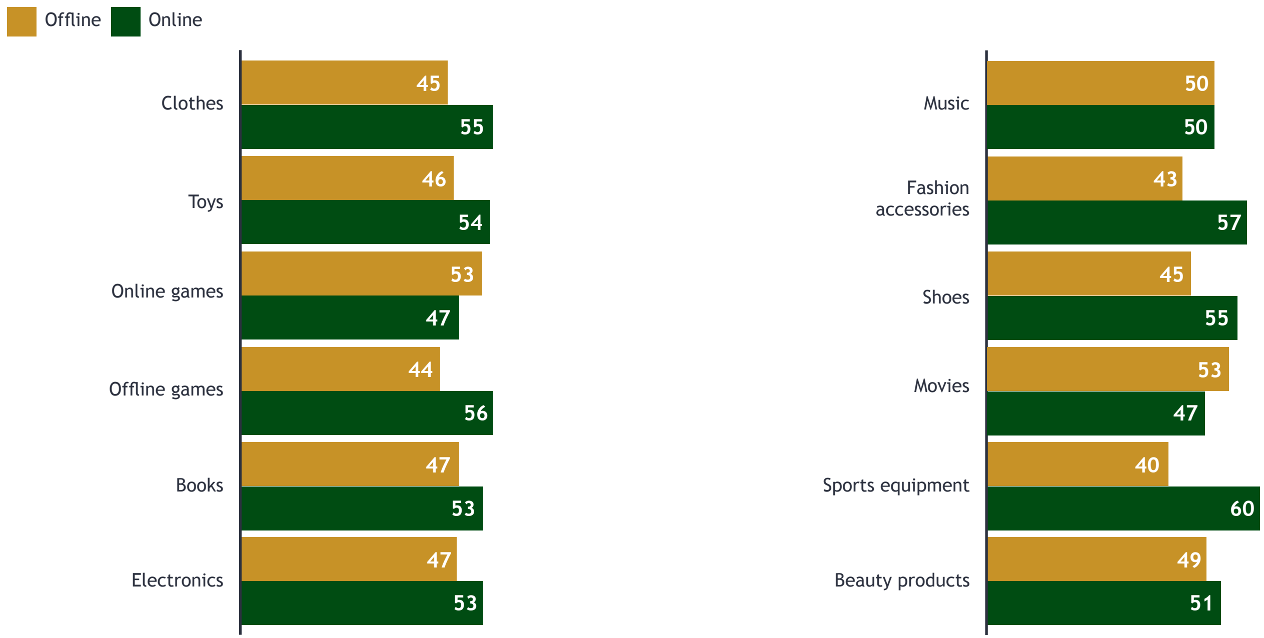
Members of Gen Z appear to be responsible spenders, with respondents saying they consider their family's financial situation before making purchases. More than 8 in 10 will make sure their parents feel a planned purchase is affordable before going ahead with it, and 9 in 10 say they refrain from spending if their parents are trying to save.

BOTH ONLINE AND OFFLINE SHOPPERS

FIGURE 4D:

Online vs. offline shopping (U.S. and U.K.)

Percentage who prefer to buy the following online vs. offline



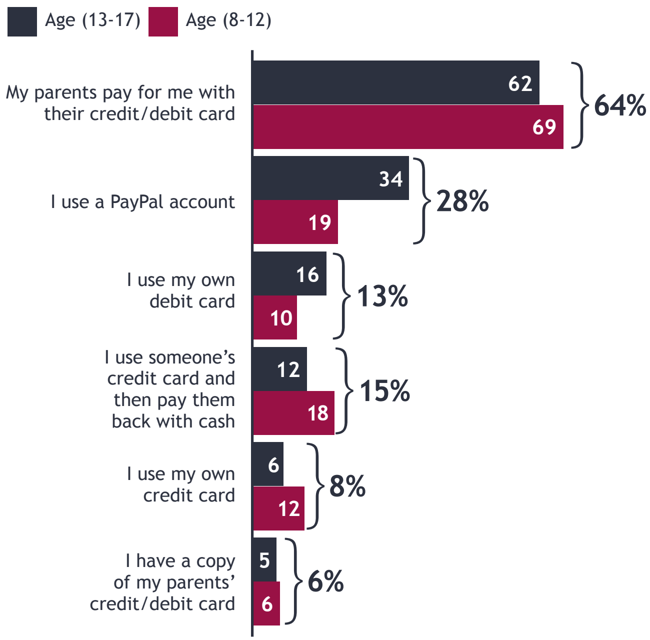
Almost half (46%) of Gen Z respondents are not yet shopping online. But of those who are, many will buy goods online and offline in equal numbers. More than half of this cohort prefers buying online in a range of categories, from fashion to sporting equipment.

PARENTS USUALLY PAY ONLINE

FIGURE 4E:

Payment methods (U.S. and U.K.)

Percentage who pay for online goods with the following



FAMILY AND FRIENDS ARE THE KEY INFLUENCERS

When asked who influences their purchasing decisions a lot:

43% family

35% friends

23% friends of friends

10% celebrities

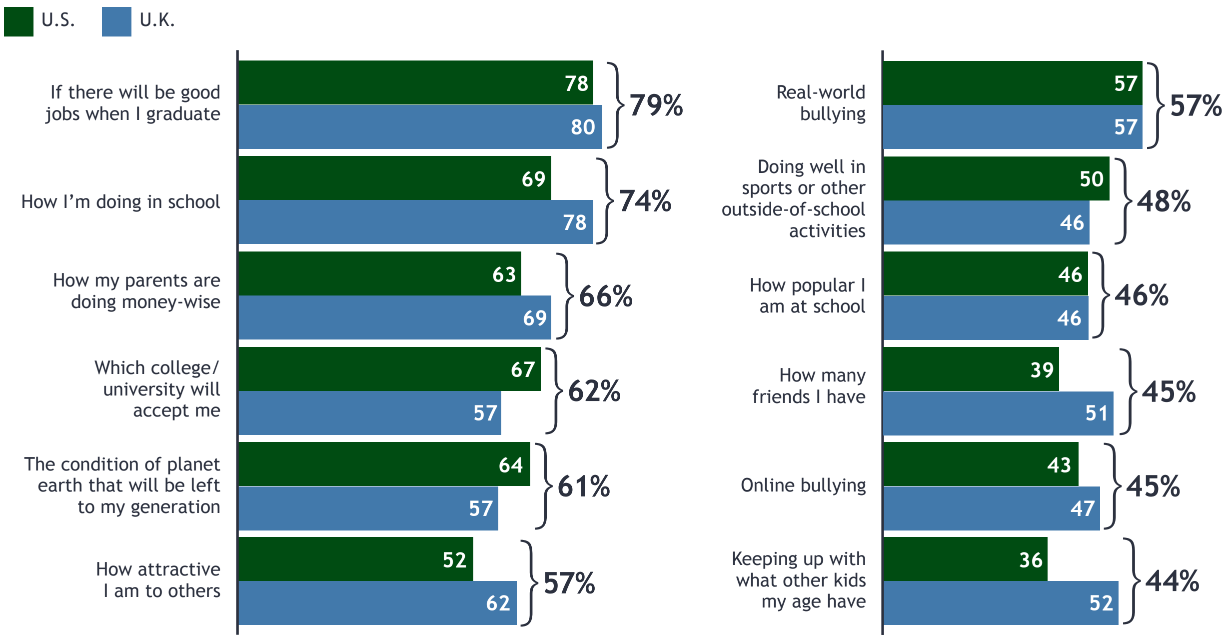
Parents are generally involved in online purchasing, both because they need to be (they hold the credit card) and want to be. (E-commerce sites also stipulate that a parent make the purchase.) However, 3 in 10 Gen Z respondents who shop online say they use their own payment method, such as PayPal or their own credit/debit card.

FORWARD-LOOKING, WORRIED ABOUT THEIR FUTURE…

FIGURE 5A:

Worried about the future (U.S. and U.K. age 13-17)

Percentage who are worried about the following



58% of teens describe themselves as very or somewhat worried

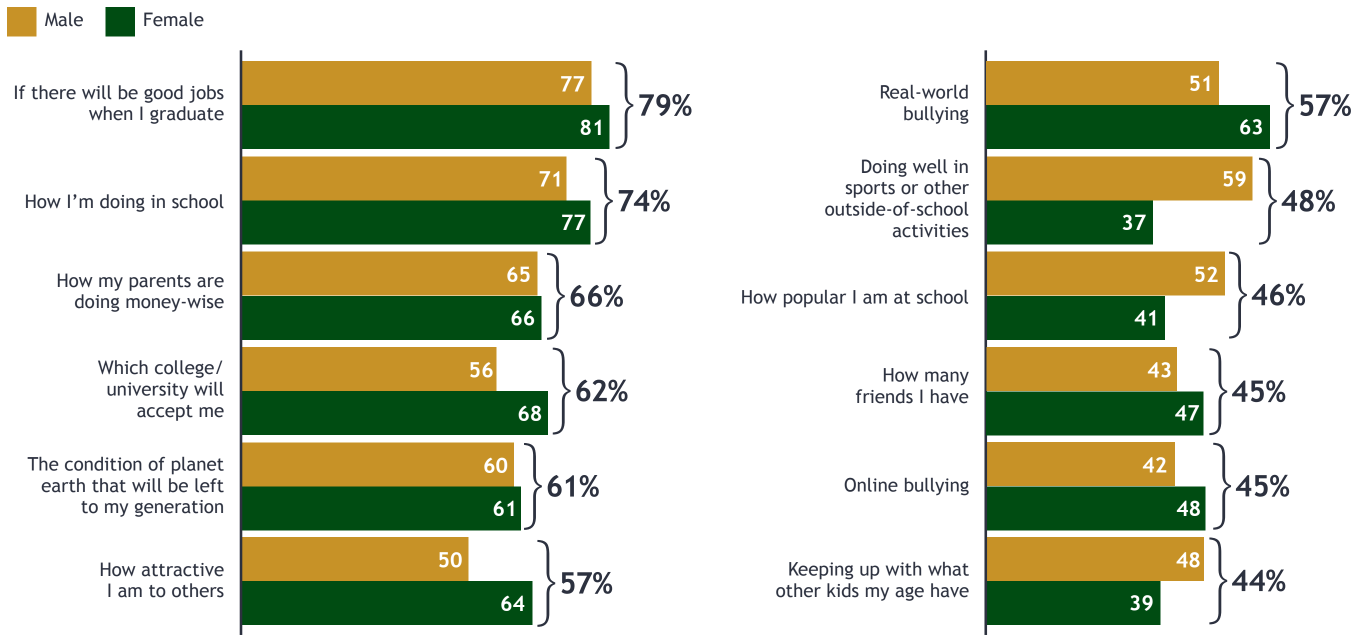
With the economic downturn comprising a significant percentage of their lives, Gen Z are most likely to be concerned about finding jobs down the road, and many are also worried about their parents' financial situation. Acceptance into higher education is another common concern.

...GIRLS ESPECIALLY

FIGURE 5B:

Worried about the future (U.S. and U.K. age 13-17)

Percentage who are worried about the following



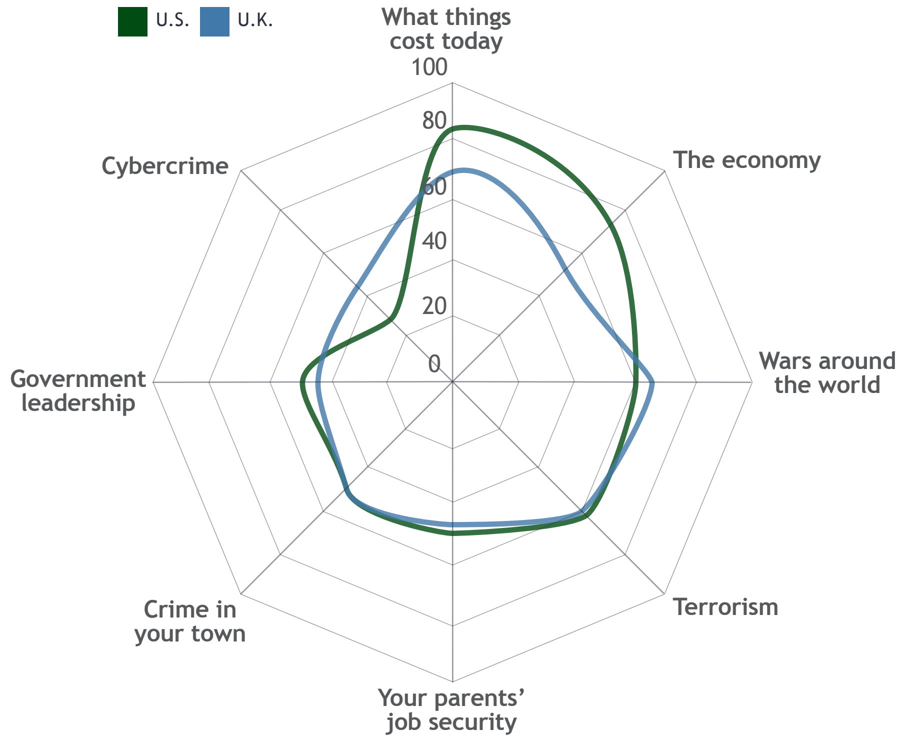
Girls are particularly concerned about their education: When it comes to getting into and affording college, they outrank boys by 12 percentage points.

ECONOMIC CONCERNS WEIGH HEAVILY, ESPECIALLY IN THE U.S.

FIGURE 5C:

Worries (U.S. and U.K. age 13-17)

Percentage who are worried about the following



Gen Z teenagers are most concerned about the cost of things. But more than three-quarters of American teens are also worried about the economy in general.

GIRLS MORE CONCERNED ABOUT WAR AND CRIME

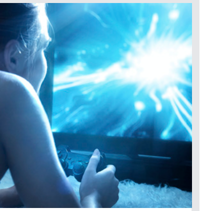
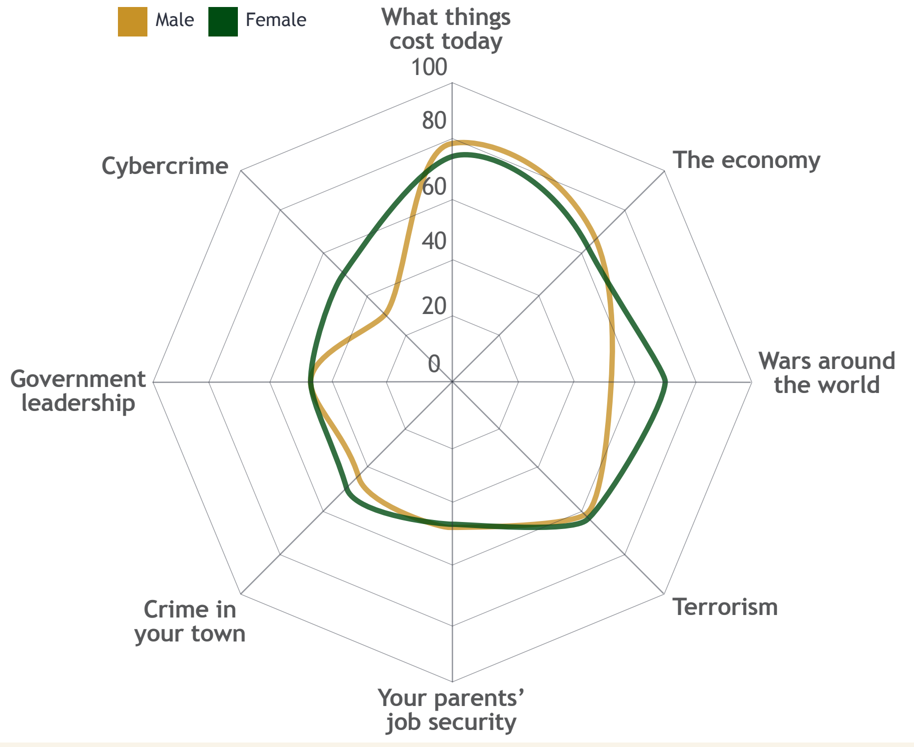


FIGURE 5D:

Worries (U.S. and U.K. age 13-17)

Percentage who are worried about the following



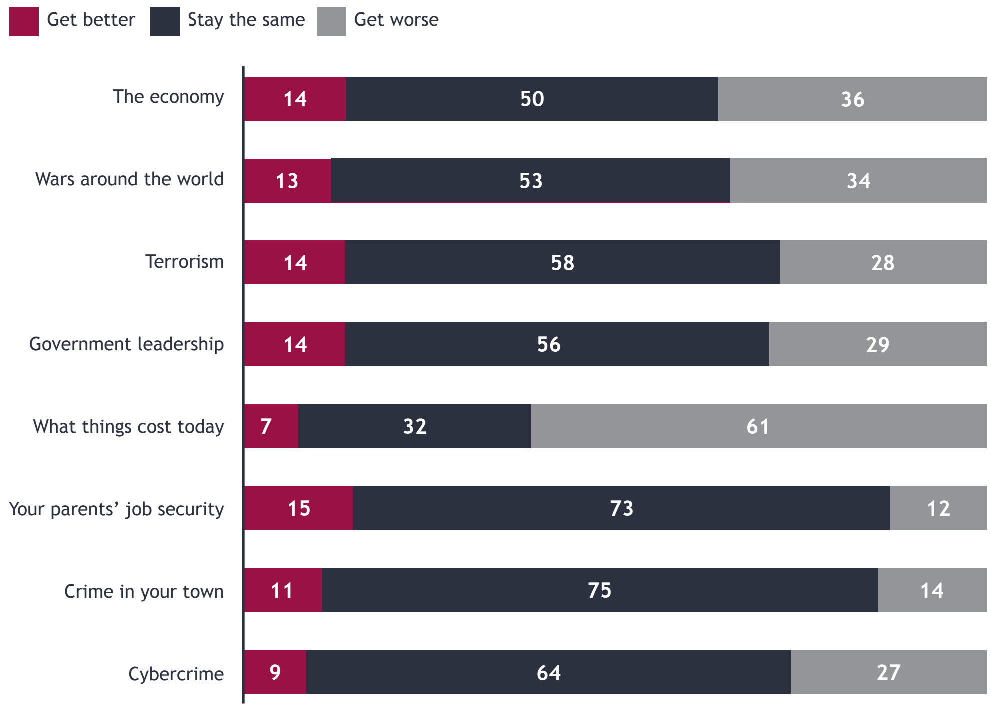
Girls are more concerned about conflicts on a global and local scale. Seven in ten are worried about wars around the world, vs. fewer than 6 in 10 boys, and significantly more are worried about cybercrime than boys. Girls are also more likely to be concerned about local crime than boys.

PESSIMISTIC ABOUT THE NEAR TERM

FIGURE 5E:

Pessimistic outlook (U.S. and U.K. age 13-17)

Percentage who think the following will get better, stay the same or get worse in the next six months



Gen Z have a somewhat pessimistic view of the future. On a macro level, most see the world either staying the same or getting worse, with geopolitical issues such as terrorism, wars and government leadership getting worse. Closer to home, they are particularly concerned about the cost of living: 61% feel price pressures will get worse.

For country breakdowns, see Appendix, Figures 5F-G.

WHAT IT MEANS FOR BRANDS

The Mobile Device as Everything Hub

This group is addicted to their mobile device. With phone saturation reaching 83% of American kids by the time they reach middle school—according to 2011 research from Bridgewater University—the mobile is an omnipresent and indispensible tool. As these kids grow up, it will become deeply integrated into their daily lives: an Everything Hub that enables socializing, shopping and surfing the Web, with geolocation services supplying information on nearby friends, relevant deals and amenities.

In response, marketers will need to create tailored mobile strategies, with websites optimized for mobile browsing. A recent estimate from Google suggests that only about a fifth of advertisers have mobile-friendly sites. Brands also need to master SoLoMo (social, local, mobile)—ensuring they pop up on Gen Z's mobile-roaming radar by, for example, linking in to services like Foursquare and Yelp.

Brands can also tap into Gen Z's embrace of social apps, engaging young consumers in fun, novel ways. Teens love Instragram, for instance, with more than a quarter of visits to the photo-sharing app coming from users under age 24, according to a recent study from Experian Hitwise. Burberry, one early adopter of the service, now has around 268,000 followers. Given the cluttered app landscape, however, approach branded apps with caution. A 2011 Pew Research Center study found that, among those with apps, more than two-thirds use only five or fewer on a regular basis.

WHAT IT MEANS FOR BRANDS (cont’d.)

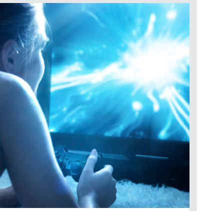
It’s a tech world after all

It’s a tech, tech world, especially for Gen Z. Digital connections are key: 90% of Gen Zers would be upset to lose their Internet connection, girls in particular. Given the importance of technology and connectivity for this generation, brands should be not only up to date but ahead of the curve tech-wise. Store environments, for instance, should be mobile-compatible, with in-store wireless, interactive displays and other innovative technology that will surprise, engage, delight and inform.

Brands can also add a digital twist to existing products. Hasbro’s Game of Life zAPPed, for instance, incorporates an iPad app into the traditional Life board game, with players spinning a virtual wheel. And Mattel’s upcoming Apptivity toys, made from conductive plastic, can control what happens in iPad games when placed on the screen.

At the same time, brands can tap into the countertrend by providing opportunities for this tech-dependent generation to disconnect from their digital devices, if only momentarily.

WHAT IT MEANS FOR BRANDS (cont'd.)



Big screens are still big

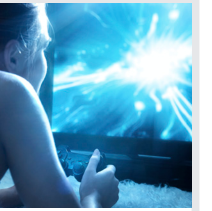
Despite the dominance of mobile, the television still occupies a central place in the lives of Gen Z. It's the device they use the most frequently and would miss the most were it taken away. With Gen Z's attention often toggling between the TV and the phone, brands will need smart multichannel strategies that engage viewers across devices. Brands can partner with services that sync smartphones to the TV (e.g., Shazam), social TV apps (Miso, GetGlue) or broadcasters' second-screen tools, or create their own. Now is the time to experiment with building communities based around TV programming, using transmedia to extend TV content onto the second screen and otherwise tapping into the mobile device to give young viewers engaging experiences.

WHAT IT MEANS FOR BRANDS (cont'd.)

Social, social, social

Gen Z is constantly connected to their social networks both digitally and emotionally. Almost 8 in 10 teens belong to some kind of social network and use it to chat with friends, share photos and play games. Talking on social networks has surpassed the phone and email as the most common mode of communication and looks set to eclipse SMS, too. Teens' romantic relationships revolve around making it "Facebook official" (as per a 2011 track by the Lance Bass-fronted boy band Heart2Heart), and sharing Facebook passwords signals another milestone.

Brands need a credible presence on social networks—providing an easy way for brand-hungry youth to connect with them—and must provide tools that make it easy for Gen Z to share content and products with their networks.



WHAT IT MEANS FOR BRANDS (cont'd.)

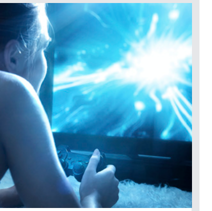
Online existence, the end of distance

Not only is socializing online more comfortable and convenient for many in Gen Z, it's putting kids in closer contact with peers around the globe—more than a quarter of this generation use their social networks to connect with people an airplane ride away. As a result, online socializing is collapsing geographical divides and radically reshaping the way kids interact with others worldwide.

One consequence of this hyper-connectedness will be Gen Z's multicultural and globally oriented mindset—much like Millennials but further amplified. Kids are Skyping with peers on the other side of the globe, and they're taking part in initiatives like the Face to Faith program (part of the Tony Blair Faith Foundation), which uses technology to connect students of different religions and cultures. Expect even more linguistic and cultural borrowings and consistencies across distant nations and regions.

Brands must understand how open-minded and globally oriented this generation will be and learn how to tap into this mindset.

WHAT IT MEANS FOR BRANDS (cont'd.)

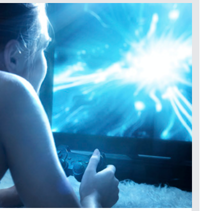


Tethered to parents when it comes to shopping

Kids may lead relatively independent digital lives, but they're still closely tethered to parents when it comes to shopping. Kids have plenty money of their own to spend—in the U.S. alone, the 30 million teens aged 13-19 wield around $200 billion in spending power, according to a 2011 report by EPM Communications—but they seek parental approval and need practical assistance for online shopping. More than 8 in 10 teens will check with parents to see if they can afford a purchase and will hold off if it's not appropriate. Since most online transactions require a credit card, the parent generally makes the purchase.

With economic circumstances and the constraints of online shopping keeping parents closely involved in kids' purchases, brands will need to address both cohorts in their messaging.

WHAT IT MEANS FOR BRANDS (cont'd.)



The worst is yet to come

Pessimism reigns among Gen Z, especially when it comes to economic matters. Many are already worried about the cost of living and feel it's only going to get worse, while concerns about the economy in general are running high.

Brands can help Gen Z navigate the new normal, offering more ways to access their products and services (e.g., more pared-down offerings, low-commitment ways to sample the brand, etc.). To assuage this consumer anxiety, brands can also offer hope-fueled communications that inspire and buoy audiences, such as the TV spots that Chrysler aired during the 2012 Super Bowl.

PARENTS OF GEN Z

Image credit: AIMSTOCK

MIXED FEELINGS ABOUT SOCIAL NETWORKING

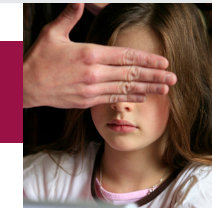
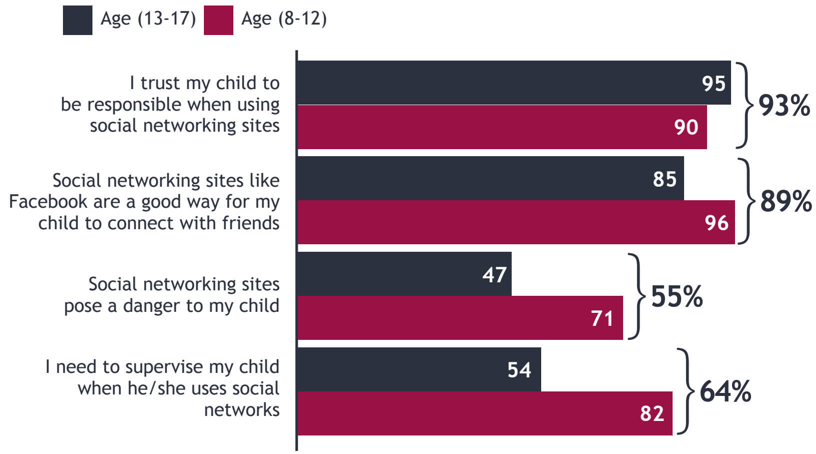


FIGURE 6A:

Attitudes toward social networks (U.S. and U.K. by child's age)

Percentage who agree with the following*



PARENTS ARE INVOLVED IN FACEBOOK

87% are Facebook friends with their child

Percentage who have made their child take down something he/she posted on Facebook **28%**

72% have their child's Facebook login info

Parents recognize the value of social networks to their child and almost all trust their child to use them responsibly—but they're also aware of the danger they pose, with 8 in 10 parents paying close attention to their tween's social networking.

*Note: Weighted average

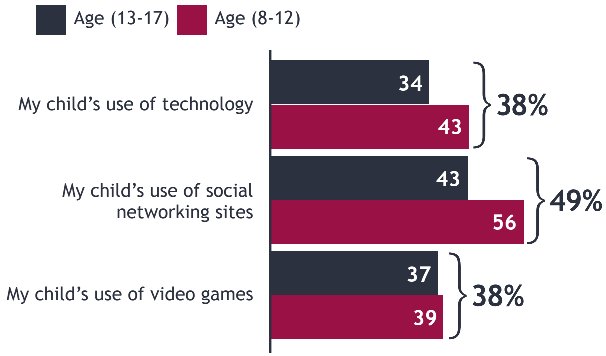
For country breakdowns, see Appendix, Figures 6E-F.

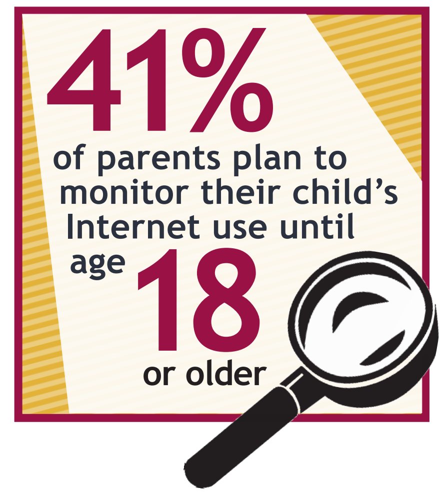
SOMEWHAT CONCERNED ABOUT CHILD'S DIGITAL ACTIVITIES

FIGURE 6B:

Concerns about digital activity (U.S. and U.K. by child's age)

Percentage who are worried about the following





While they're in the minority, significant percentages of parents are concerned about their child's use of digital devices and social networks. As might be expected, parents of younger kids are more apt to worry.

For country breakdowns, see Appendix, Figures 6G-H.

MOST WANT KIDS TO TAKE TIME AWAY FROM TECH

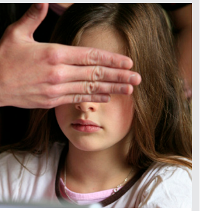
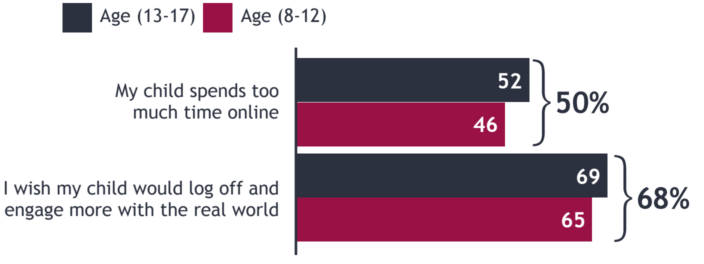


FIGURE 6C:

Too much technology (U.S. and U.K. by child's age)

Percentage who agree with the following*



With much of Gen Z immersed in their digital devices throughout the day, parents are keen for their child to De-Tech and engage more with the real world.

*Note: Weighted average

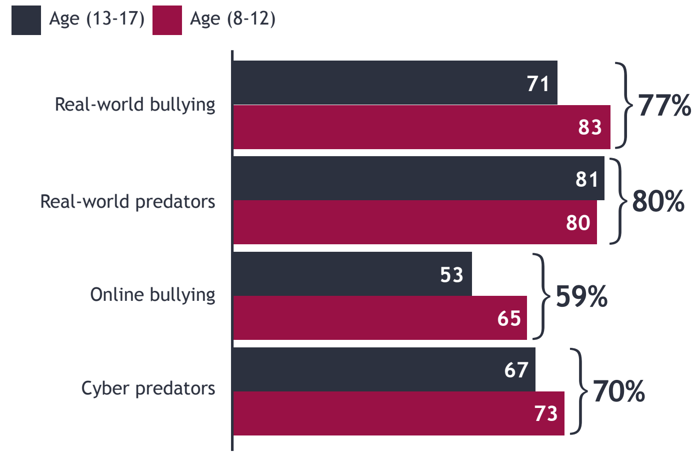
For country breakdowns, see Appendix, Figures 6I-J.

MORE WORRIED ABOUT REAL-WORLD THAN VIRTUAL THREATS

FIGURE 6D:

Real world vs. virtual threats (U.S. and U.K. by child's age)

Percentage who are worried about the following



42% of parents feel their child becomes vulnerable online at **age 7** or younger

While parents are worried about online threats such as cyber-predators and bullies, more are concerned about real-world predators and bullies. With some U.S. states enacting tough anti-bullying legislation, however, expect cyber bullying and other online dangers to become a bigger concern.

PARENTS MOSTLY DOLE OUT CASH

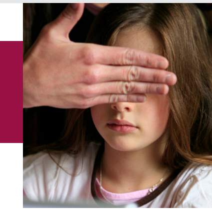
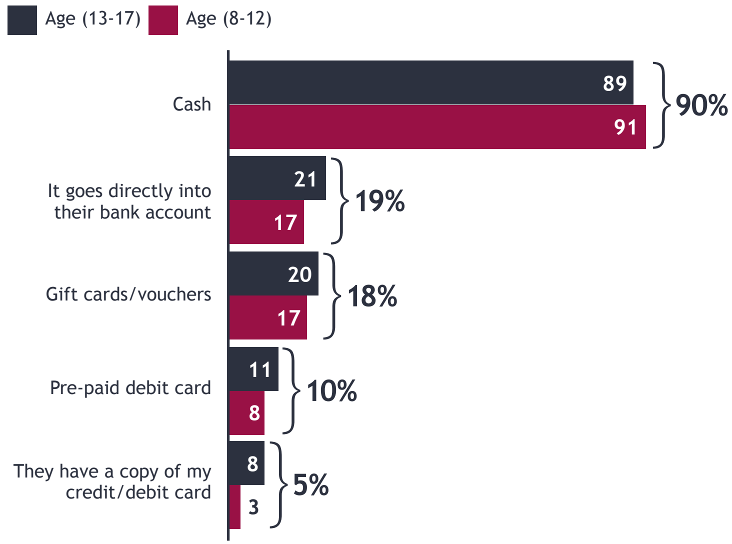


FIGURE 7A:

Cash is king (U.S. and U.K. by child's age)

Percentage who give their child money in the following forms



SHOW THEM THE MONEY:

58% of kids receive a monthly allowance

51% receive money when they do chores around the house

50% receive money when they go out with friends

The majority of parents opt for cash in hand, but they also put money directly into their child's account and give them pre-paid debit cards (or, in some cases, a copy of their credit or debit card).

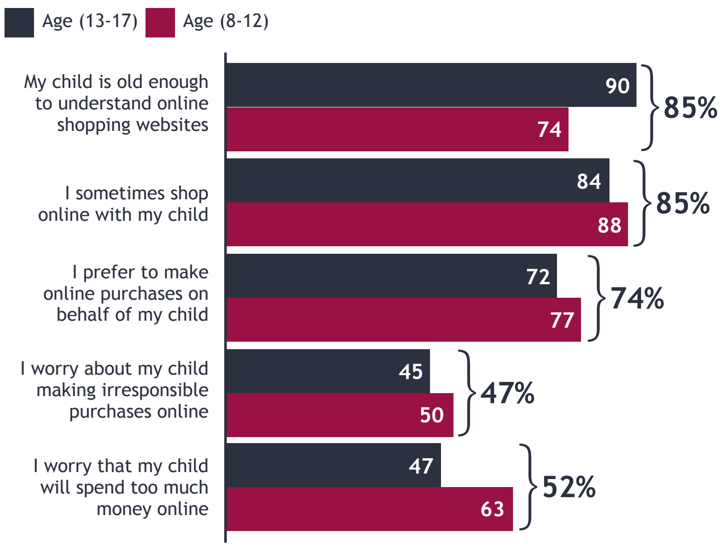
For country breakdowns, see Appendix, Figures 7B-C.

CAUTIOUS ABOUT KIDS SHOPPING ONLINE

FIGURE 8A:

Attitudes toward online shopping (U.S. and U.K. by child's age)

Percentage who agree with the following*



Of Gen Z consumers who shop online, more than 6 in 10 do so a few times a month or more

While most parents consider their child mature enough to understand e-commerce sites, around half worry about a kid making irresponsible purchases or spending too much online. A wide majority take the reins on e-commerce, buying online for a child or shopping online together.

*Note: Weighted average

For country breakdowns, see Appendix, Figures 8C-D.

BOYS LESS TRUSTED WITH ONLINE SHOPPING

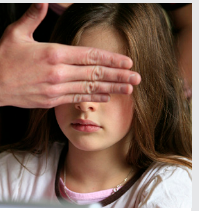
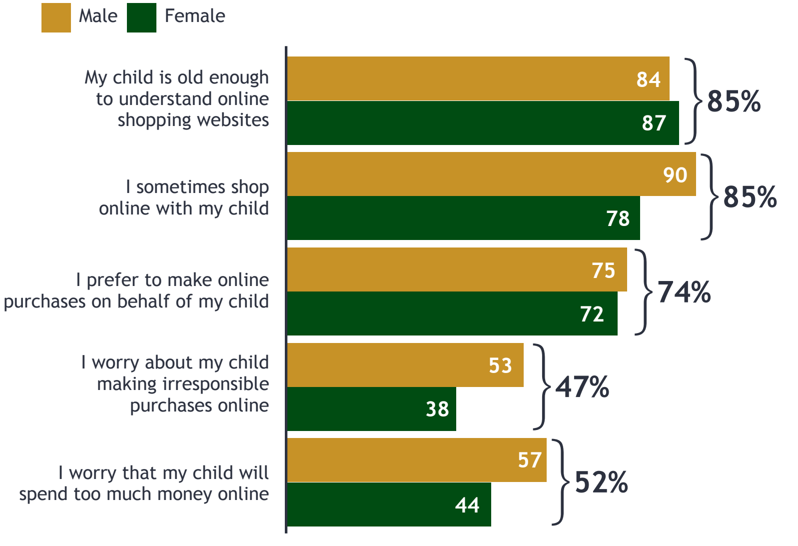


FIGURE 8B:

Attitudes toward online shopping (U.S. and U.K. by child's gender)

Percentage who agree with the following*



Parents perceive boys as less responsible than girls when it comes to shopping purchases by a large margin (15 percentage points). More parents also worry that their son will spend too much online and are more apt to shop online with a son than a daughter.

*Note: Weighted average

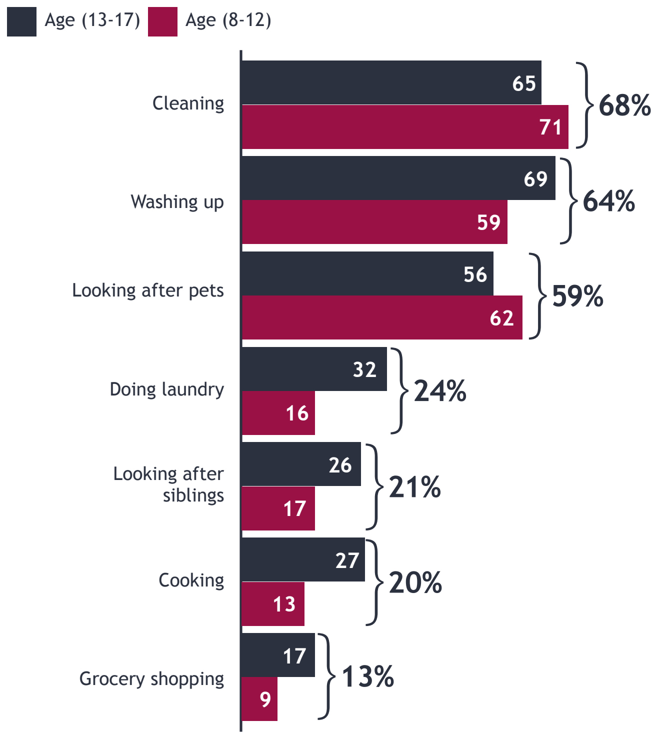
For country breakdowns, see Appendix, Figures 8E-F.

MOST PARENTS ASSIGN HOUSEHOLD RESPONSIBILITIES...

FIGURE 9A:

Household responsibilities (U.S. and U.K. by child's age)

Percentage who assign the following to their child



Almost
9 in 10
parents assign their child responsibilities around the house

Most of Gen Z is growing up doing chores around the house like cleaning or washing up. More complex activities like cooking or grocery shopping are less common.

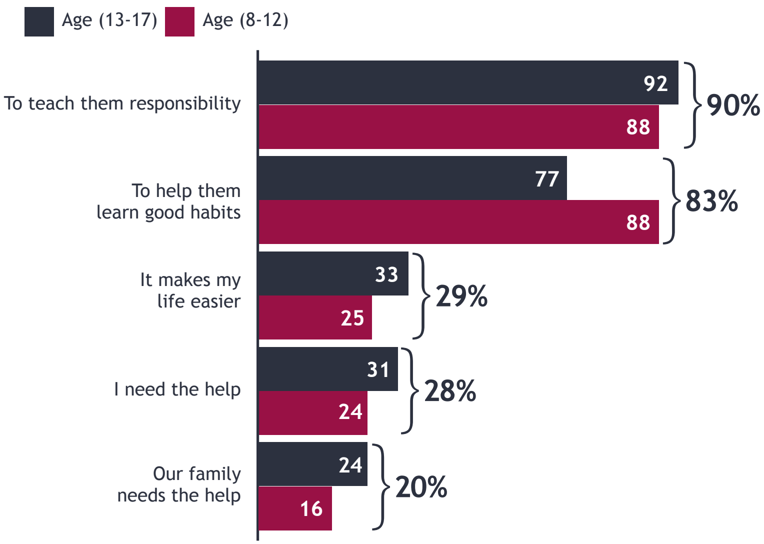
For country breakdowns, see Appendix, Figures 9C-D.

…AS A WAY TO TEACH RESPONSIBILITY AND GOOD HABITS

FIGURE 9B:

Teaching good habits (U.S. and U.K. by child's age)

Percentage who assign their child responsibilities for the following reasons



For parents, assigning domestic chores is primarily a way to instill good habits and a sense of responsibility. Around 3 in 10 parents acknowledge it also helps make things easier, either because they or their family needs the help.

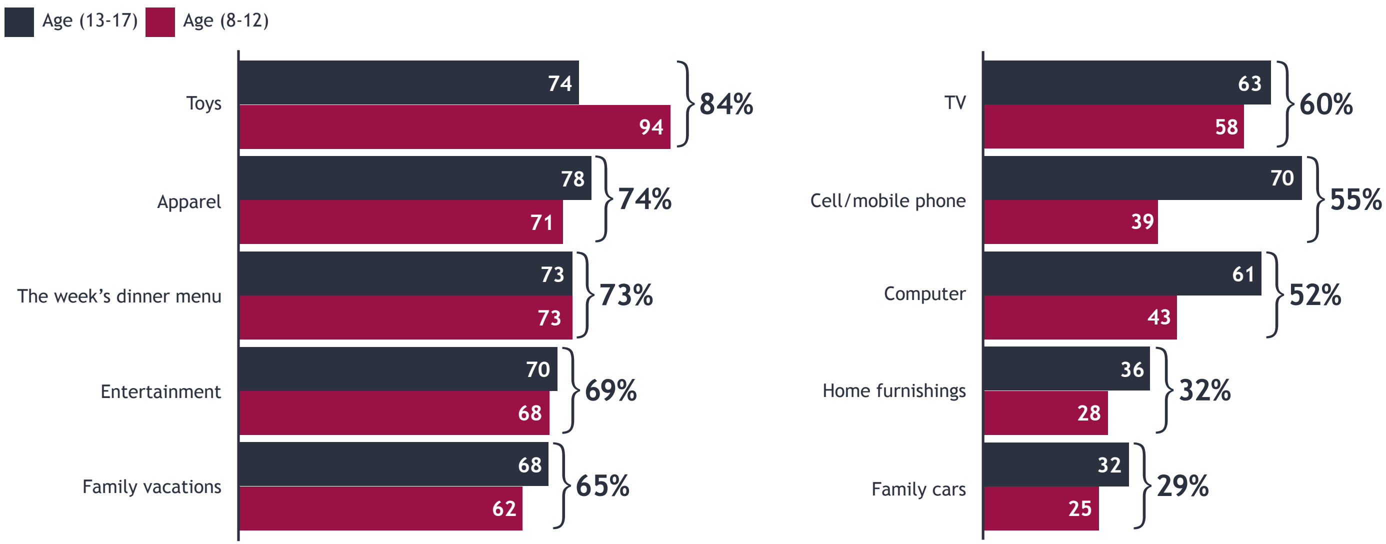
For country breakdowns, see Appendix, Figures 9E-F.

KIDS EXERT STRONG INFLUENCE ON HOUSEHOLD PURCHASES

FIGURE 10A:

Areas of influence (U.S. and U.K. by child's age)

Percentage who feel their child is influential when purchasing the following



In many categories, children are significantly likely to impact parents' purchasing decisions. For tech items especially, notably mobile phones, many parents will look to teens for input when choosing what to buy.

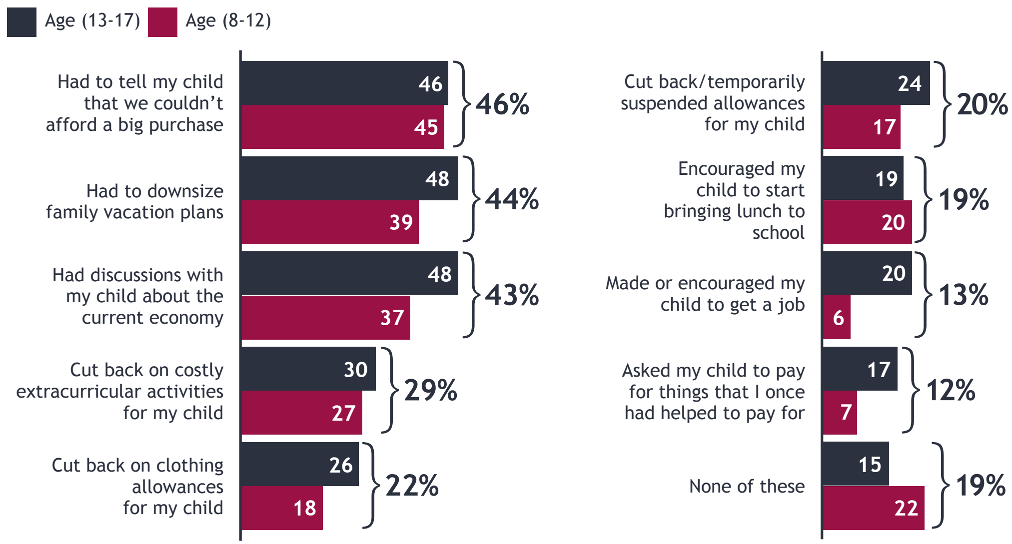
For country breakdowns, see Appendix, Figures 10B-C.

PARENTS AFFECTED BY ECONOMIC CLIMATE, AS IS GEN Z

FIGURE 11A:

Economic adjustments (U.S. and U.K. by child's age)

Percentage who have done the following



1 in 4

parents feels their child knows a lot about the current economic situation

Around 8 in 10 families have made adjustments because of the current economic climate. A little over 4 in 10 have discussed the economic situation with their child and/or explained that they can't afford a big purchase. Whether or not Gen Z knows it, a swath has been affected by family cutbacks, with parents pulling back on family vacations, costly extracurricular activities and clothing allowances.

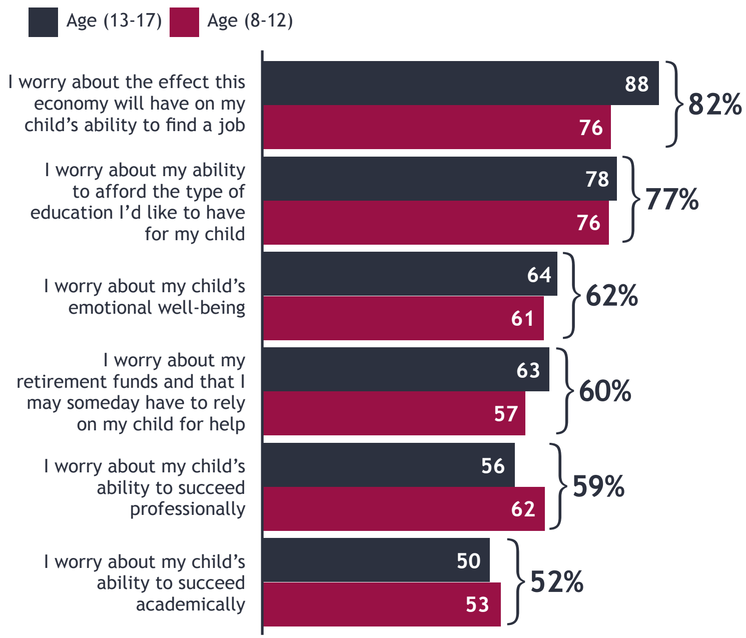
For country breakdowns, see Appendix, Figures 11C-D.

WORRIED ABOUT THEIR CHILD'S PROSPECTS

FIGURE 11B:

Fearful about the future (U.S. and U.K. by child's age)

Percentage who agree with the following



Only about **HALF** of parents feel social networking will help their child be a better adjusted adult

With both youth unemployment and education costs at a record high, a wide majority of parents are worried about their child's job prospects and their own ability to pay their child's education. Some of this concern relates to their own futures: Looking ahead to retirement, 6 in 10 fear they'll eventually have to rely on their child for financial help.

For country breakdowns, see Appendix, Figures 11E-F.

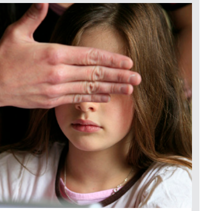
WHAT IT MEANS FOR BRANDS

Significant safety concerns about online activities

While most parents trust their child to behave sensibly in the digital realm, many have some concerns about cyber safety and security. As these dangers come increasingly into the spotlight, parents will demand accountability, transparency and responsibility from online services. Many sites will have to persuade parents that their safety practices and tools are rigorous, such as their systems that detect cyber predators or fraud.

Brands can offer tools that help parents track their child's online and mobile activities in unobtrusive ways. Gamification, for instance, can encourage kids to accept their parents' supervision by putting a fun and lighthearted spin on it. And as Gen Z starts to push back against parents hovering around their digital realm, brands can provide a happy middle ground with communal and collaborative experiences. If properly orchestrated, these can help parent and child to share information and work together to ensure a safer online experience. Strategies that make everyone feel involved can give Gen Z some autonomy without making parents too anxious.

WHAT IT MEANS FOR BRANDS (cont'd.)



Conflicted about Gen Z's use of technology

Most parents see Gen Z's technological aptitude as both impressive and concerning. To many parents, unprecedented access to information is making their children more "educated," "cyber-savvy" and "intelligent" (as some of our open-ended questions revealed)—they're perceived as smarter than the generations that came before them, mostly due to technology. This outlook can spur parents to invest in tech devices, especially if there's an associated educational or developmental benefit.

At the same time, many parents are concerned about what they perceive as kids' over-reliance on technology. Half of parents feel their child spends too much time online, and nearly 7 in 10 wish their child would log off and engage more with the real world. Brands can bring parents and children together via outdoor activities, tech-free toys and other kinds of unplugged experiences targeted at parents who want their child to focus back in on the real, rather than the digital world.

WHAT IT MEANS FOR BRANDS (cont'd.)

Questioning the values of the younger generation

Older generations typically question the values of those that come after them, and in this case, many parents are concerned that Gen Z's dependence on technology is negatively affecting their values. They also wonder if it affects their ability to function in the real world. Some parents expressed concern that, with digital devices and Internet connections everywhere, technology is making their child "lazy" and entitled.

As kids gain access to mature content online, many parents are expressing concern about their child "growing up too quickly." For parents, emphasizing solid values around responsibility, reliability and community will become increasingly important in countering their child's possible exposure to too much, too soon.

WHAT IT MEANS FOR BRANDS (cont'd.)

Children stay close during household purchasing

Gen Z is making a significant impact on household purchasing decisions. Since this highly brand-savvy generation may represent the most informed consumer in the household, time-constrained, stressed-out parents are turning to their kids when it comes to choosing products. For tech purchases, in particular, parents will ask their teen for information and suggestions (for instance, 70% of parents report that their teen influences their mobile phone purchase).

With many families shopping online together, brands should find ways to integrate parent and child into the process. On- or offline, keeping children engaged, informed and excited about products will help to drive household purchases.

WHAT IT MEANS FOR BRANDS (cont'd.)

Austerity-induced anxiety, especially over their child's future

Many parents have felt the pinch of the current economic climate, which means their children have, too. As families have made adjustments to their lifestyle, many have kept their children informed about the larger context: 43% of parents have had discussions with their child about the economy, and around a quarter feel their child knows a lot about the current economic situation.

The most pressing concern for many parents is the economic and professional future of their child—not surprising considering that youth unemployment is at an all-time high around the globe. More than 8 in 10 parents are worried about how the economy will affect their child's ability to find a job. And as their own financial stability diminishes, many are worried about affording the education they want for their child.

As a generation growing up in economic austerity, Gen Z will likely inherit a set of anxieties about their financial situation—indeed, they are already anxious about their future. This anxiety will drive frugality (62% of kids say they like to save their money) but also an ambition to achieve in the face of adversity.

APPENDIX

Image credit: Spree2010

GEN Z:
ADDITIONAL CHARTS

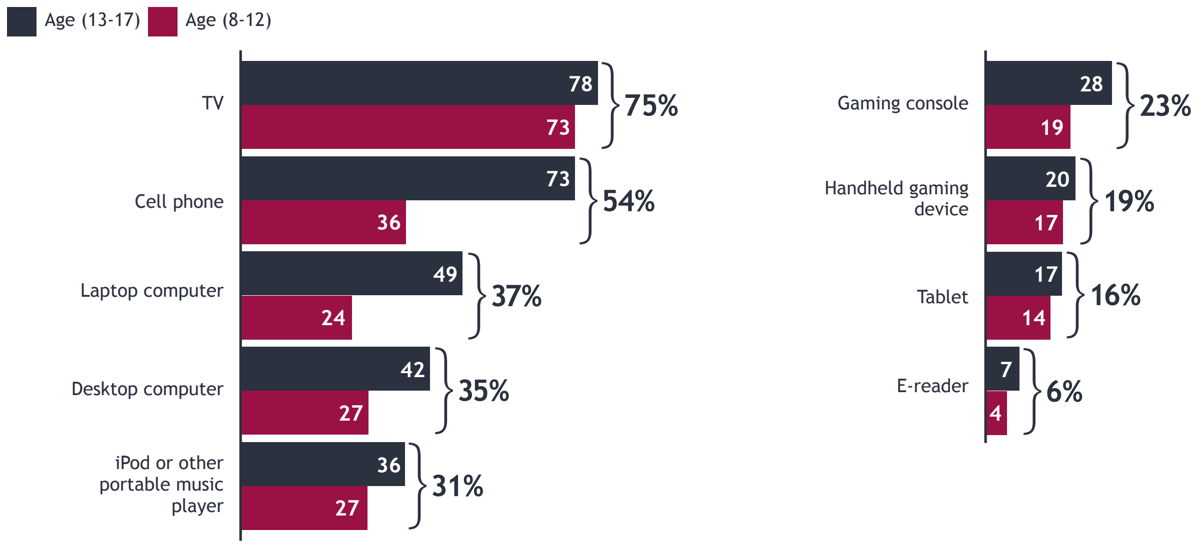
Image credit: chaoss

APPENDIX: ADDITIONAL CHARTS

FIGURE 1F:

Always attached to technology (U.S.)

Percentage who use the following devices multiple times per day

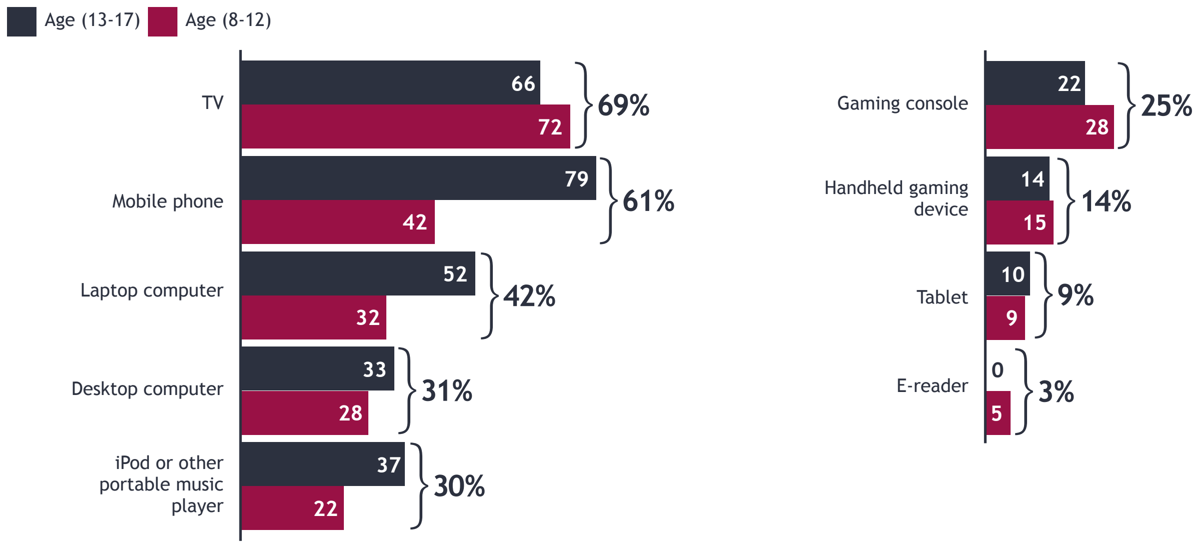


APPENDIX: ADDITIONAL CHARTS (cont'd.)

FIGURE 1G:

Always attached to technology (U.K.)

Percentage who use the following devices multiple times per day

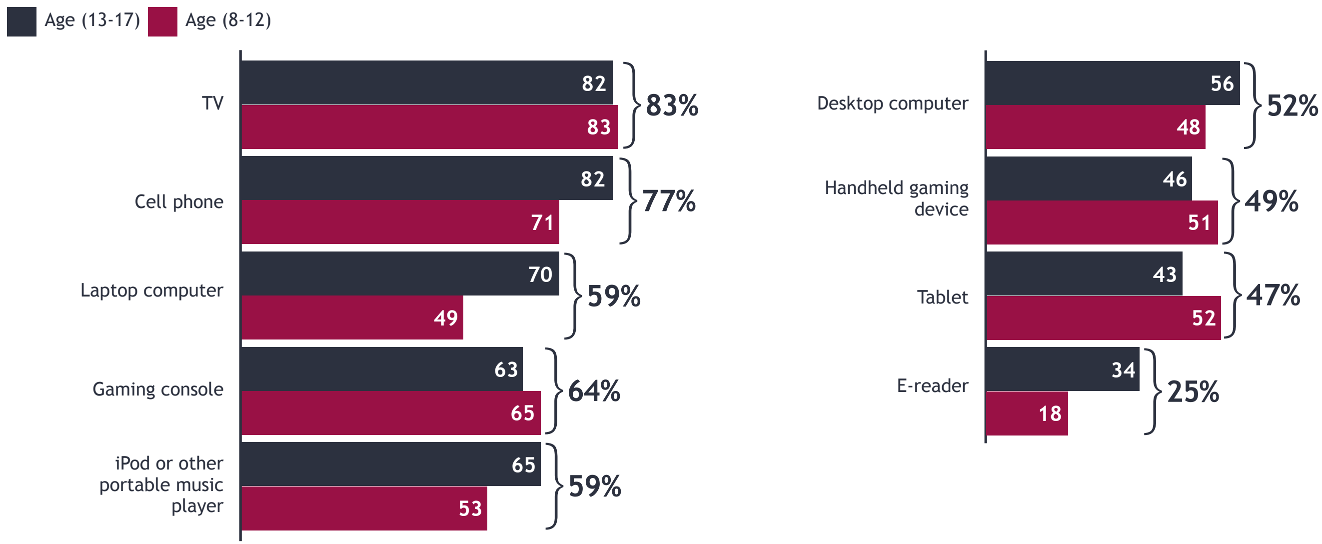


APPENDIX: ADDITIONAL CHARTS (cont'd.)

FIGURE 1H:

Relationships with their devices (U.S.)

Percentage who would miss the following device if they were taken away

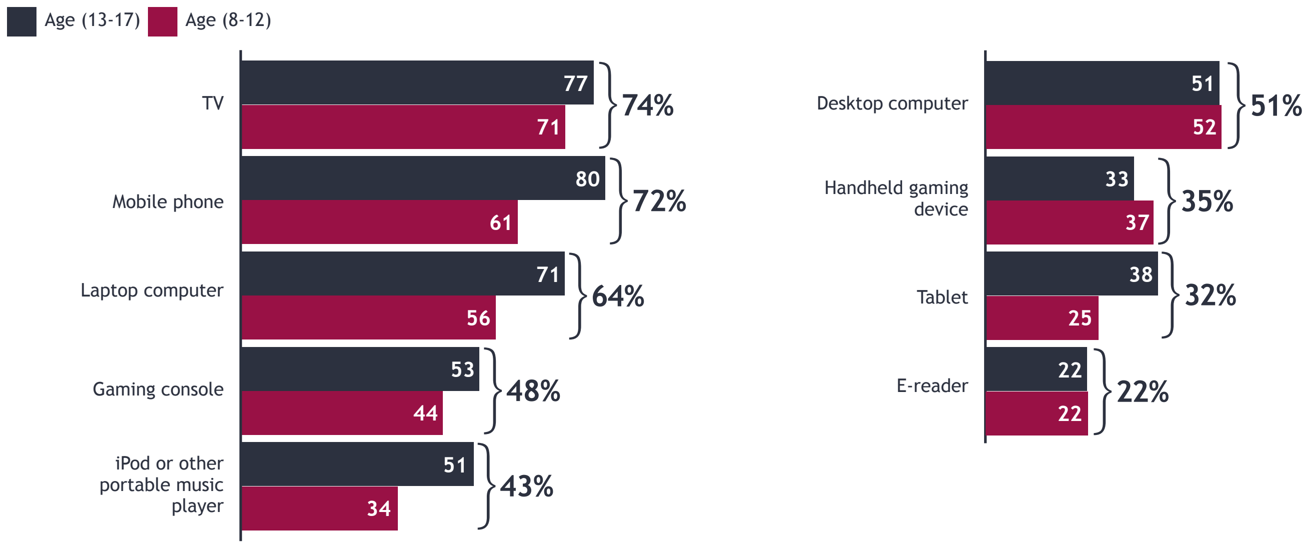


APPENDIX: ADDITIONAL CHARTS (cont'd.)

FIGURE 1I:

Relationships with their devices (U.K.)

Percentage who would miss the following device if they were taken away



APPENDIX: ADDITIONAL CHARTS (cont'd.)

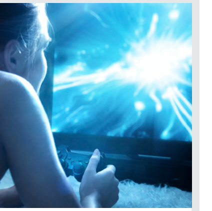


FIGURE 1J:

Internet access options (U.S.)

Percentage who use the following devices to access the Internet

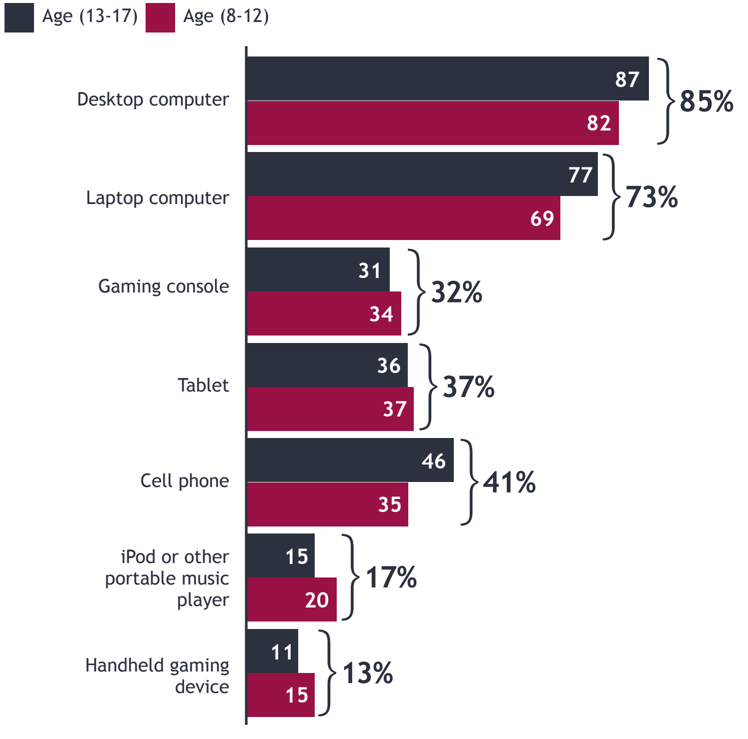
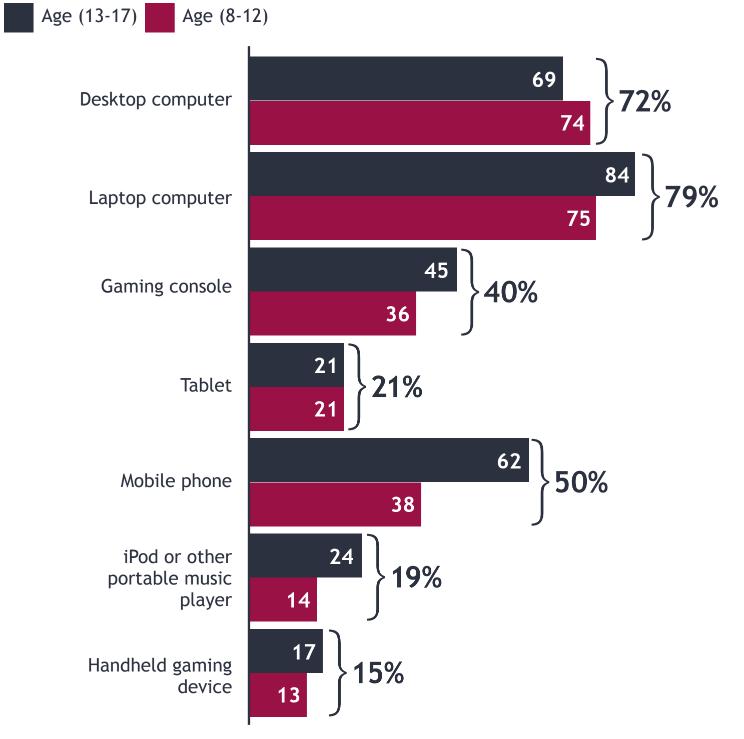


FIGURE 1K:

Internet access options (U.K.)

Percentage who use the following devices to access the Internet



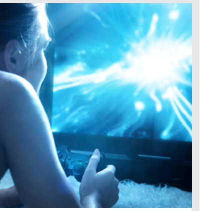


FIGURE 2B:

Social networks (U.S.)

Percentage of respondents who belong to the following social networks

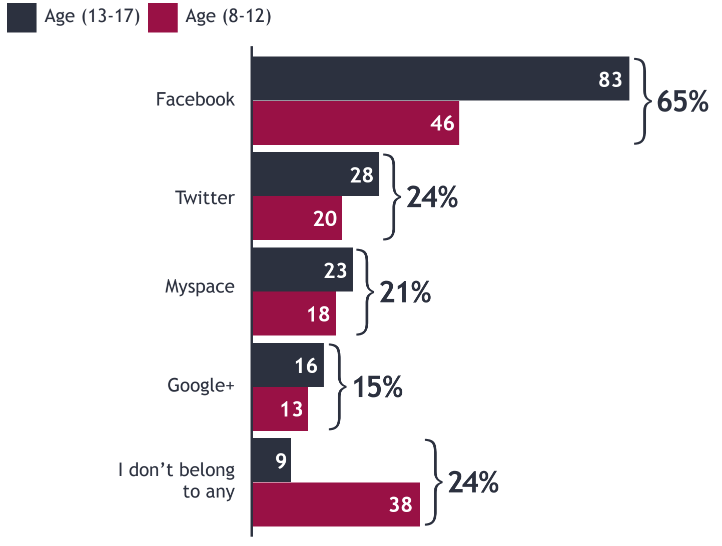


FIGURE 2C:

Social networks (U.K.)

Percentage of respondents who belong to the following social networks

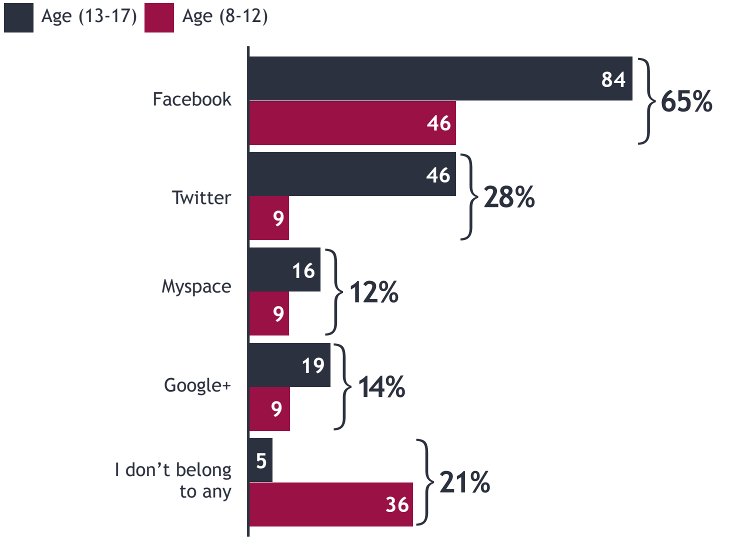
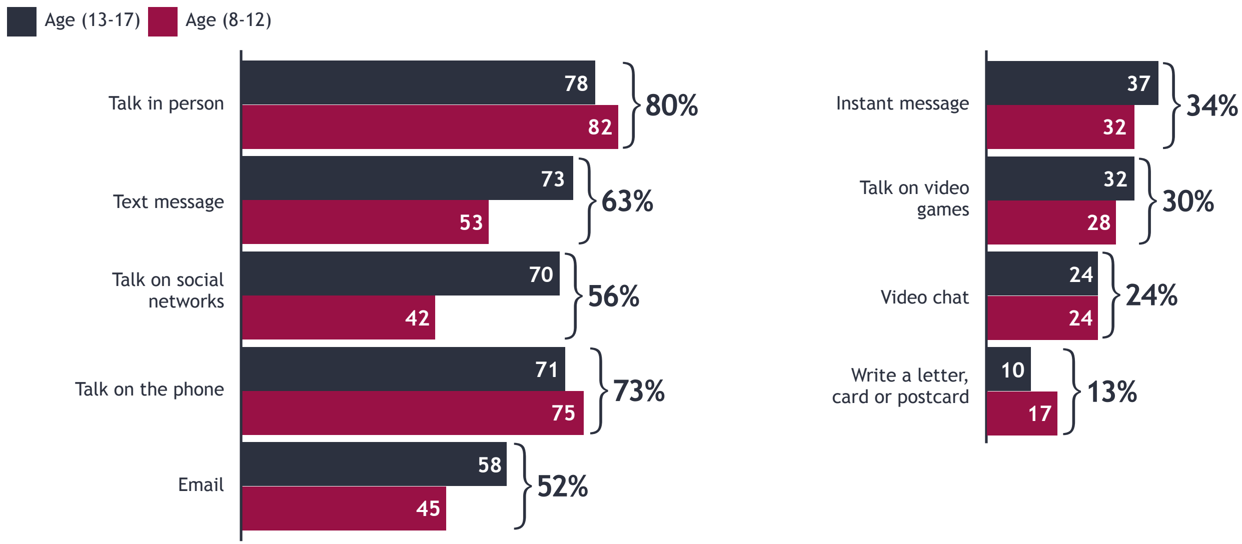


FIGURE 3C:

Constant contact (U.S.)

Percentage who have done the following in the past few weeks with friends

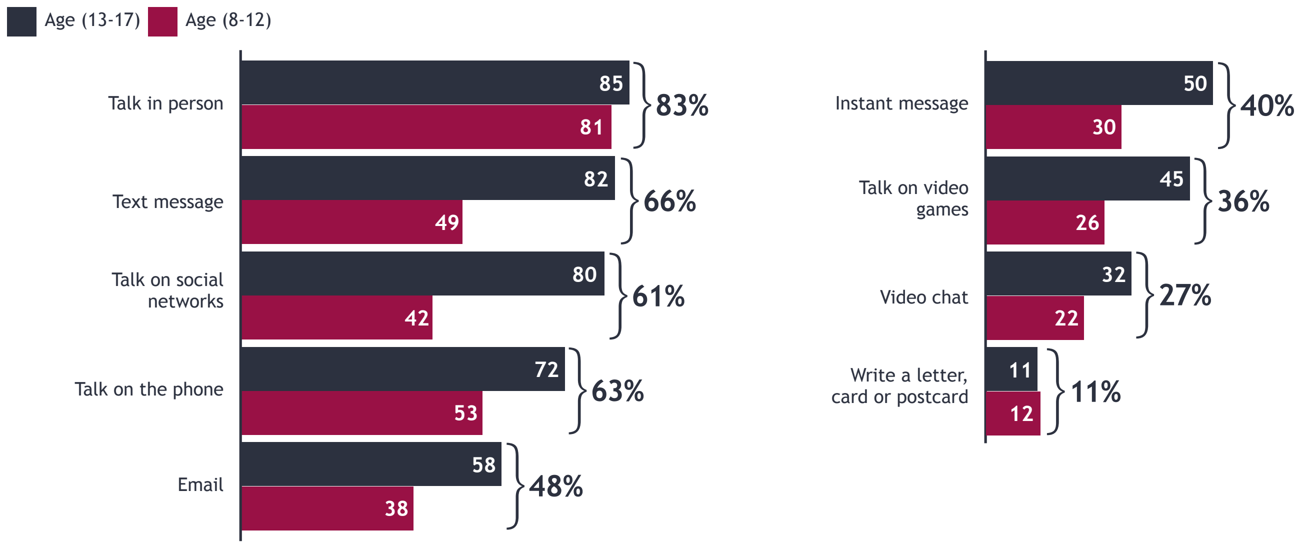


APPENDIX: ADDITIONAL CHARTS (cont'd.)

FIGURE 3D:

Constant contact (U.K.)

Percentage who have done the following in the past few weeks with friends



APPENDIX: ADDITIONAL CHARTS (cont'd.)

FIGURE 3E:

Online vs. offline socializing (U.S.)

Percentage who agree with each of the following

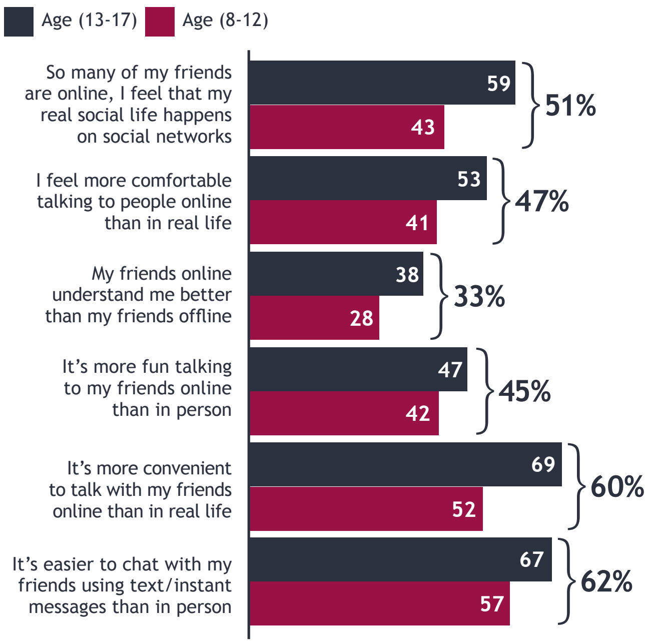
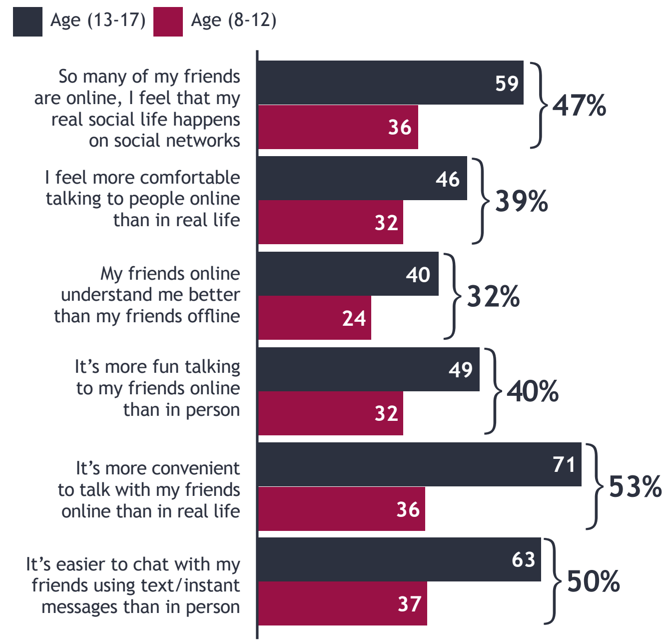


FIGURE 3F:

Online vs. offline socializing (U.K.)

Percentage who agree with each of the following

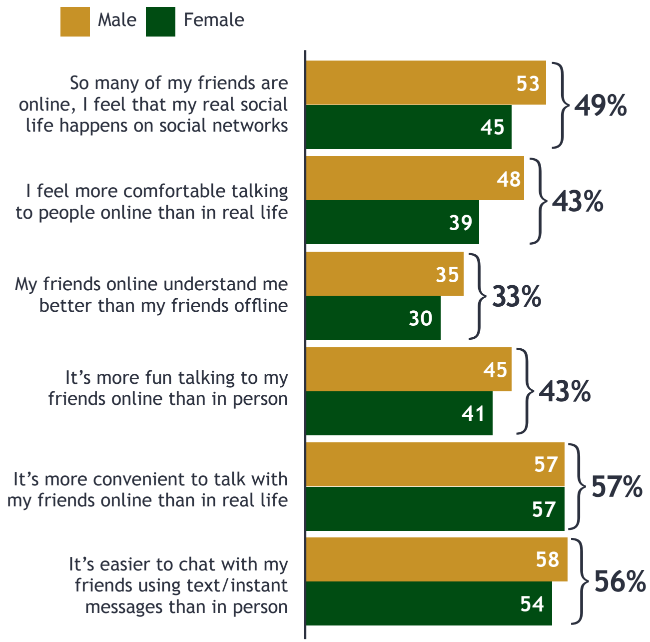


APPENDIX: ADDITIONAL CHARTS (cont’d.)

FIGURE 3G:

Online vs. offline socializing (U.S. and U.K.)

Percentage who agree with each of the following



APPENDIX: ADDITIONAL CHARTS (cont'd.)

FIGURE 3H:

Online vs. offline socializing (U.S.)

Percentage who agree with each of the following

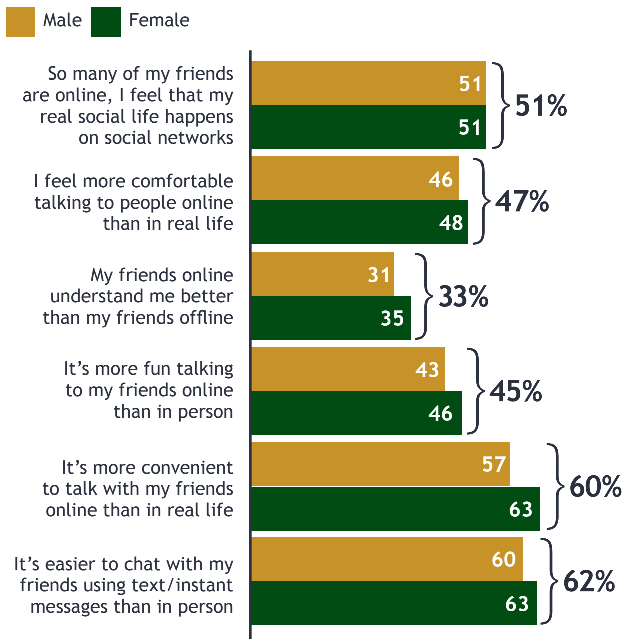
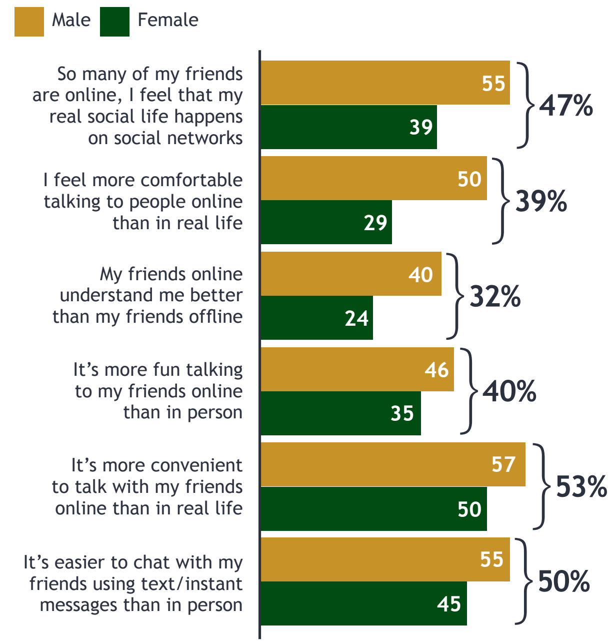


FIGURE 3I:

Online vs. offline socializing (U.K.)

Percentage who agree with each of the following



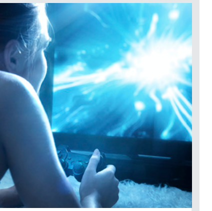
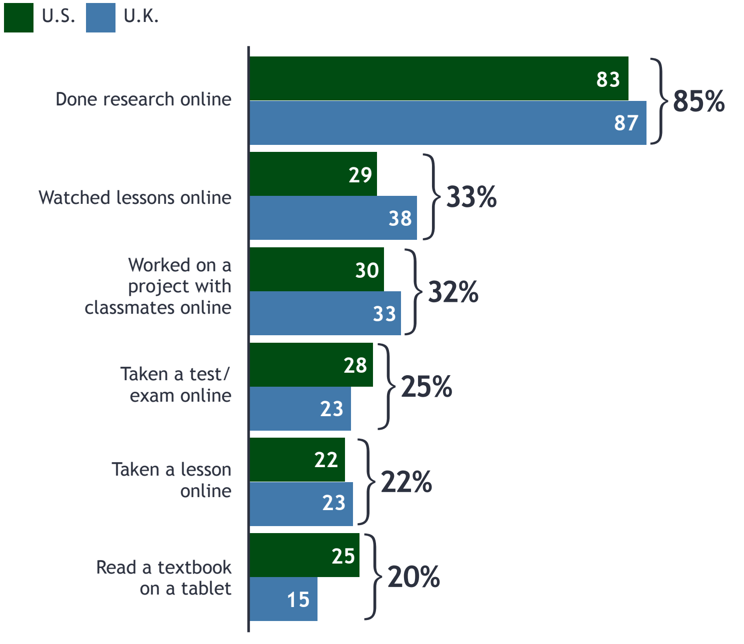


FIGURE 3J:

Educated online (U.S. and U.K. age 13-17)

Percentage who have done the following



APPENDIX: ADDITIONAL CHARTS (cont'd.)

FIGURE 4F:

Spenders and savers (U.S.)

Percentage who like to do the following with their money

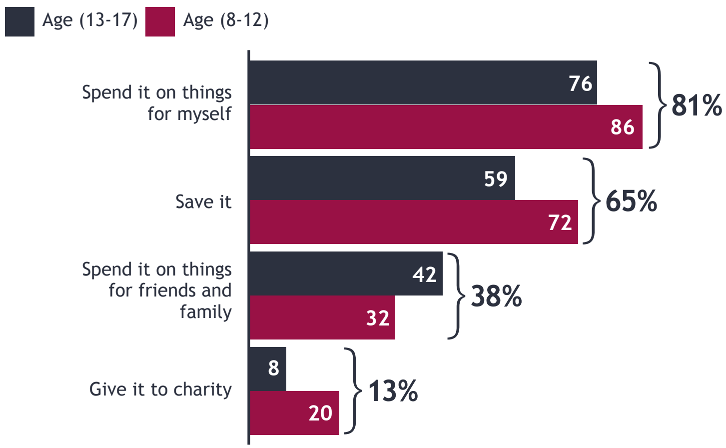
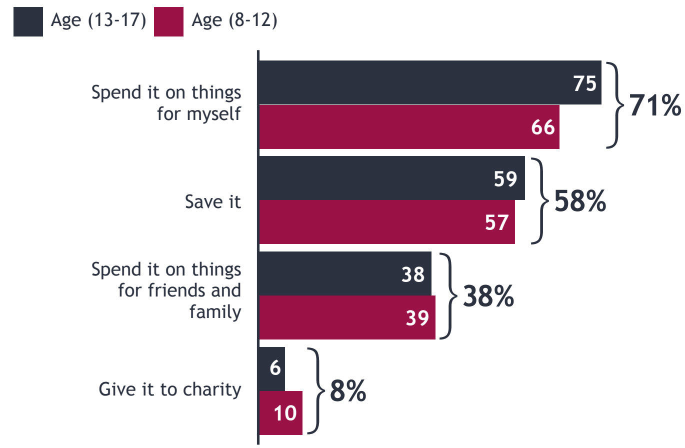


FIGURE 4G:

Spenders and savers (U.K.)

Percentage who like to do the following with their money



APPENDIX: ADDITIONAL CHARTS (cont'd.)

FIGURE 4H:

Spenders and savers (U.S.)

Percentage who like to do the following with their money

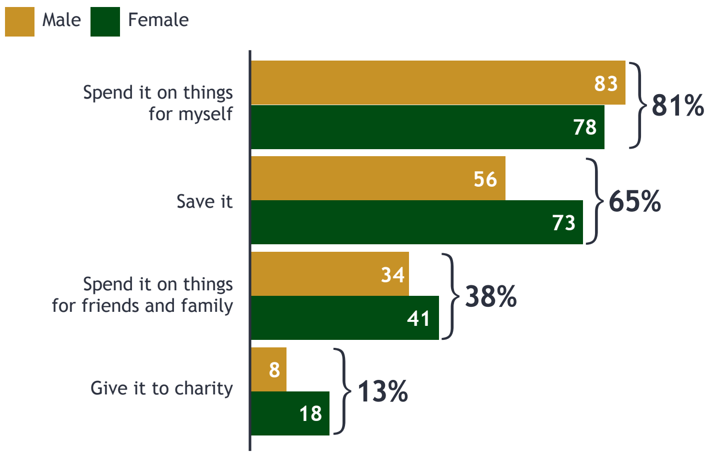
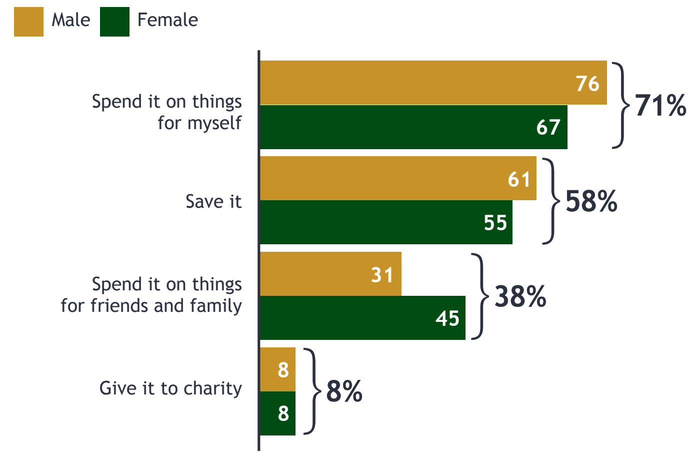


FIGURE 4I:

Spenders and savers (U.K.)

Percentage who like to do the following with their money



APPENDIX: ADDITIONAL CHARTS (cont'd.)

FIGURE 5F:

Pessimistic outlook (U.S. age 13-17)

Percentage who think the following will get better, stay the same or get worse in the next six months

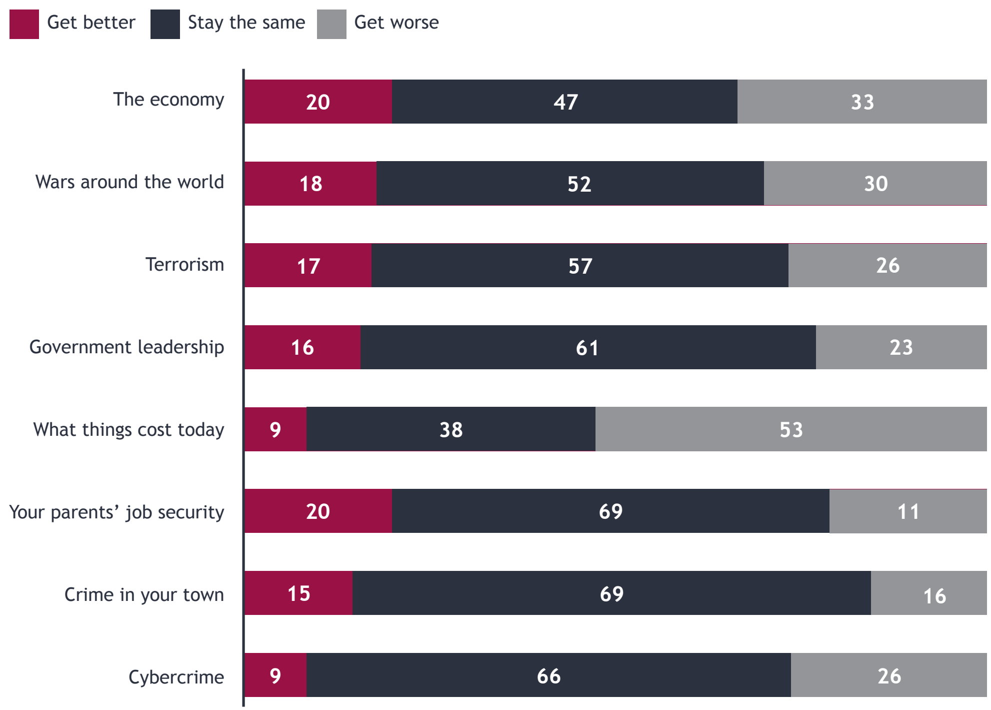
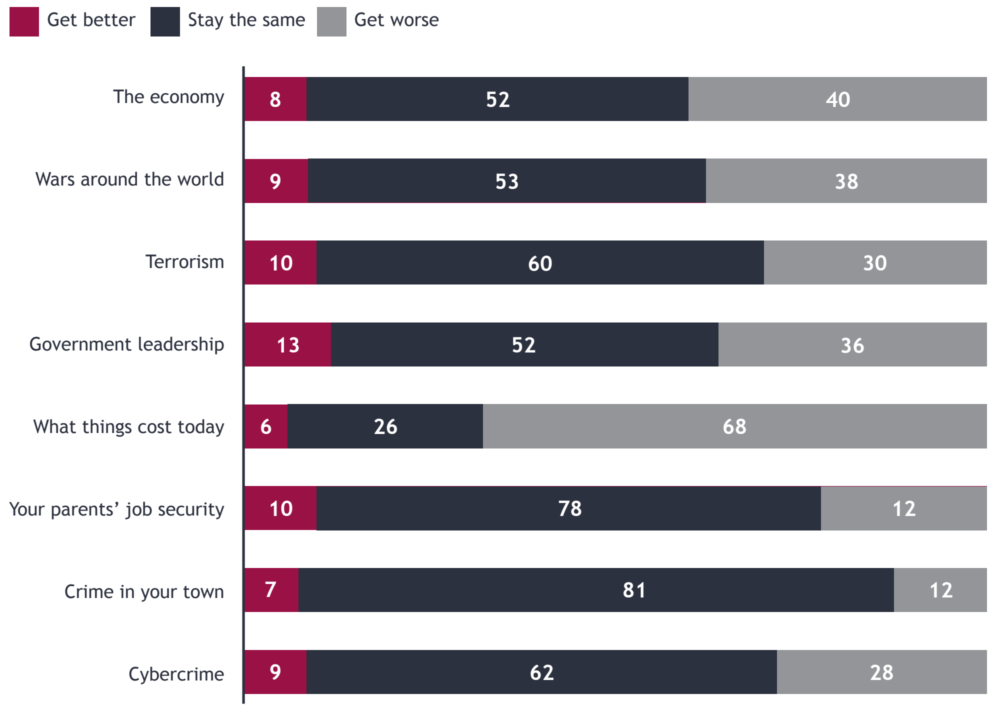


FIGURE 5G:

Pessimistic outlook (U.K. age 13-17)

Percentage who think the following will get better, stay the same or get worse in the next six months



PARENTS OF GEN Z:
ADDITIONAL CHARTS

Image credit: AIMSTOCK

APPENDIX: ADDITIONAL CHARTS

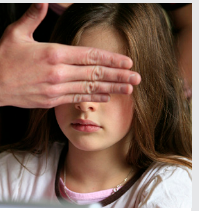


FIGURE 6E:

Attitudes toward social networks (U.S. by child's age)

Percentage who agree with the following*

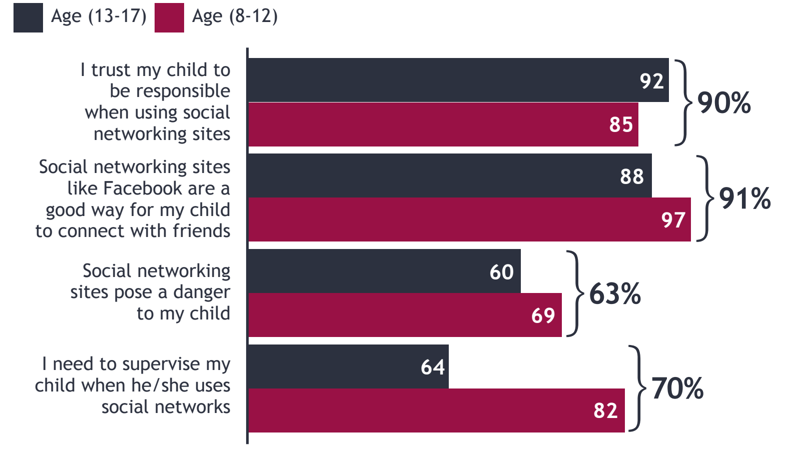
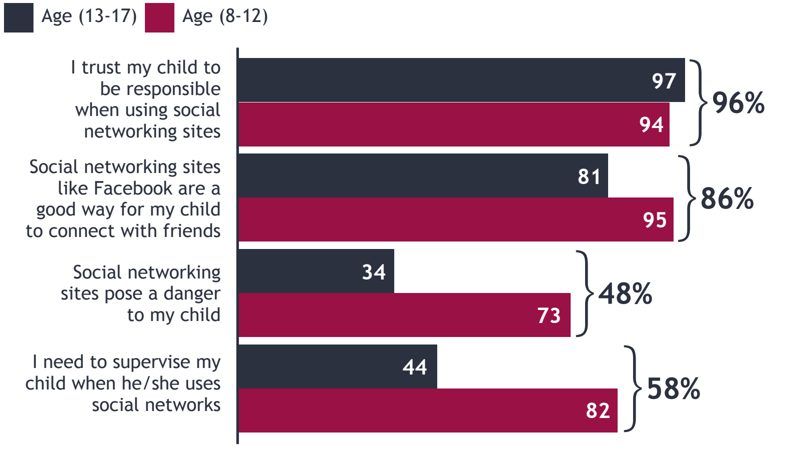


FIGURE 6F:

Attitudes toward social networks (U.K. by child's age)

Percentage who agree with the following*



*Note: Weighted average

APPENDIX: ADDITIONAL CHARTS (cont'd.)

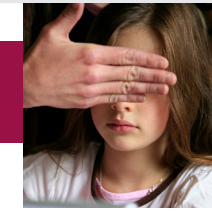


FIGURE 6G:

Concerns about digital activity (U.S. by child's age)

Percentage who are worried about the following

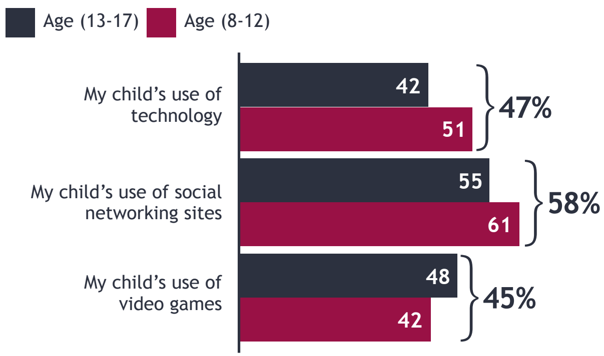
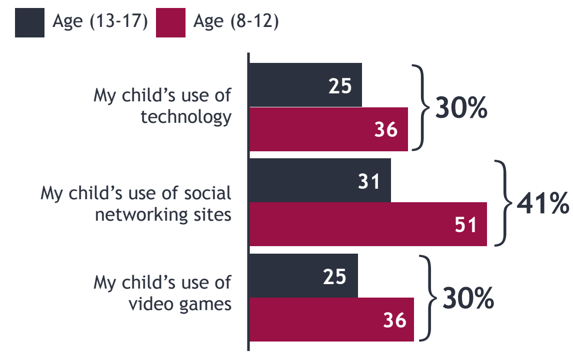


FIGURE 6H:

Concerns about digital activity (U.K. by child's age)

Percentage who are worried about the following



APPENDIX: ADDITIONAL CHARTS (cont'd.)

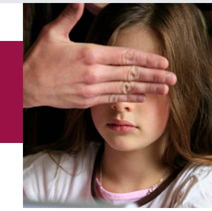


FIGURE 6I:

Too much technology (U.S. by child's age)

Percentage who agree with the following*

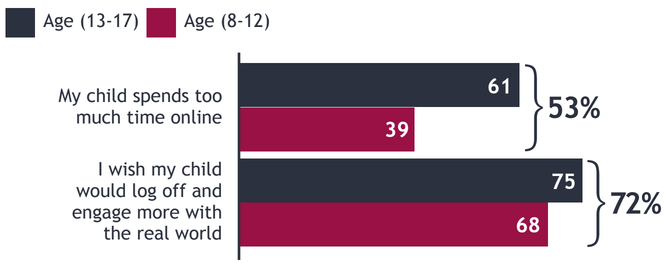
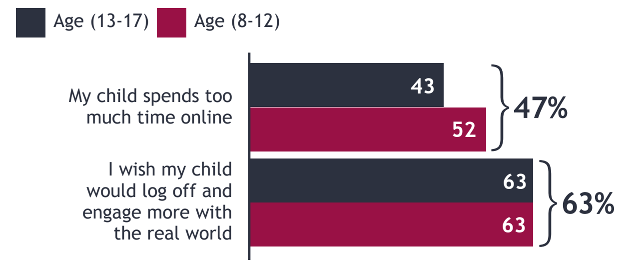


FIGURE 6J:

Too much technology (U.K. by child's age)

Percentage who agree with the following*



*Note: Weighted average

APPENDIX: ADDITIONAL CHARTS (cont'd.)

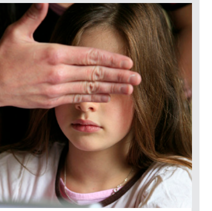


FIGURE 6K:

Real world vs. virtual threats (U.S. by child's age)

Percentage who are worried about the following

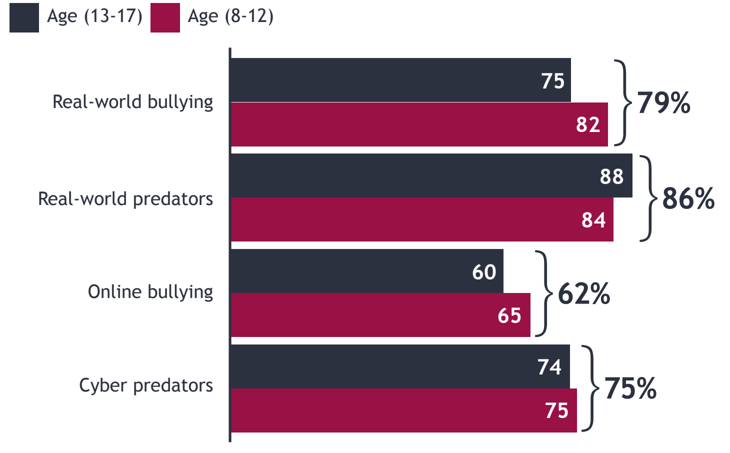
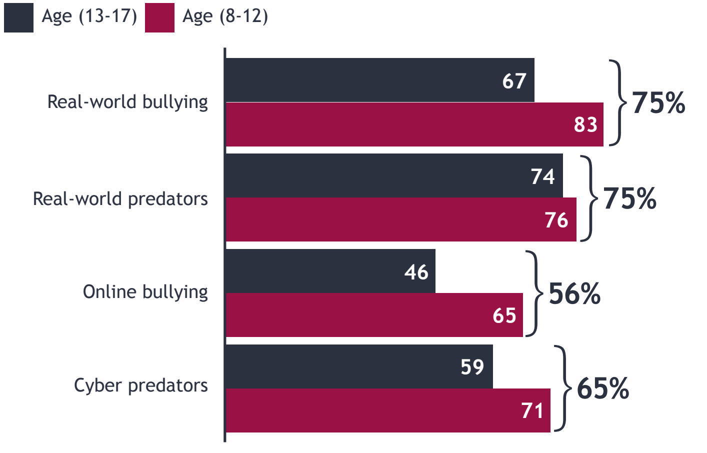


FIGURE 6L:

Real world vs. virtual threats (U.K. by child's age)

Percentage who are worried about the following



APPENDIX: ADDITIONAL CHARTS (cont'd.)

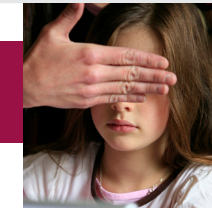


FIGURE 7B:

Cash is king (U.S. by child's age)

Percentage who give their child money in the following forms

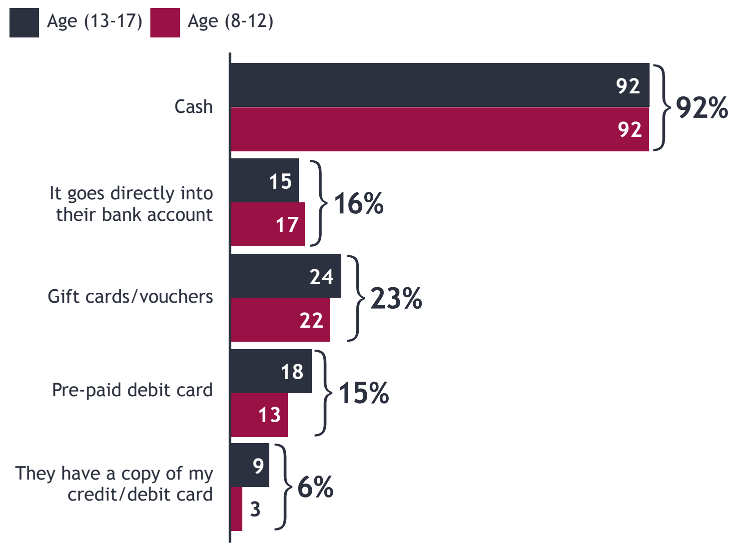
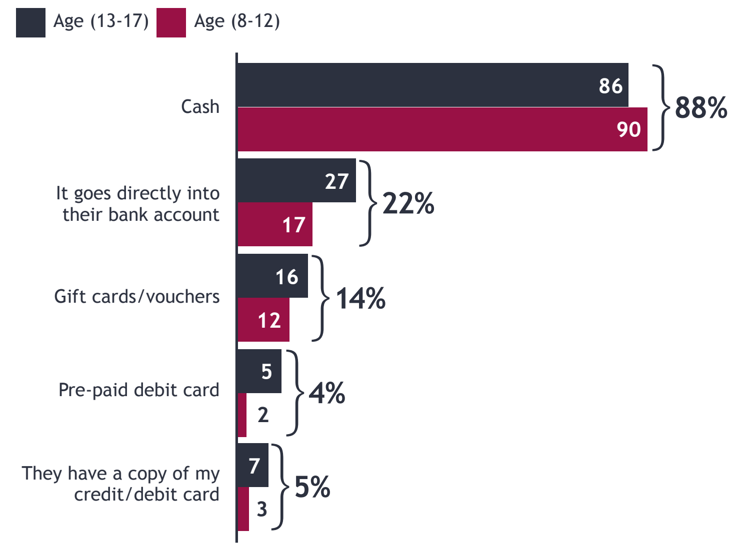


FIGURE 7C:

Cash is king (U.K. by child's age)

Percentage who give their child money in the following forms



APPENDIX: ADDITIONAL CHARTS (cont'd.)

FIGURE 8C:

Attitudes toward online shopping (U.S. by child's age)

Percentage who agree with the following*

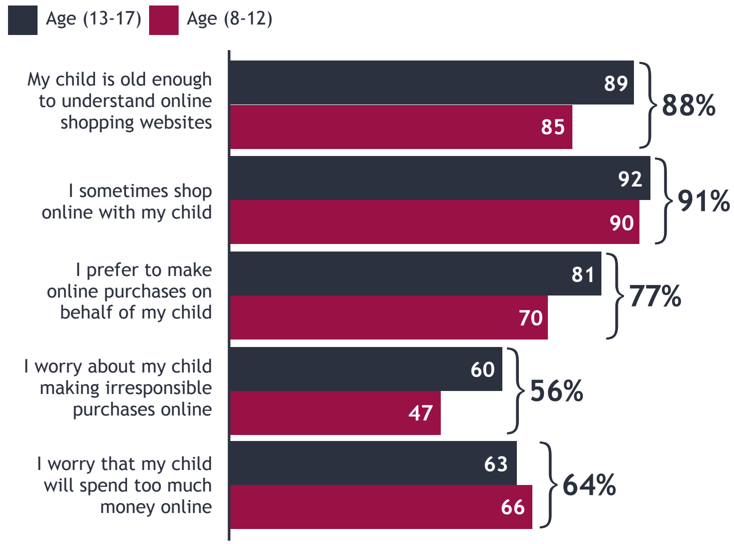
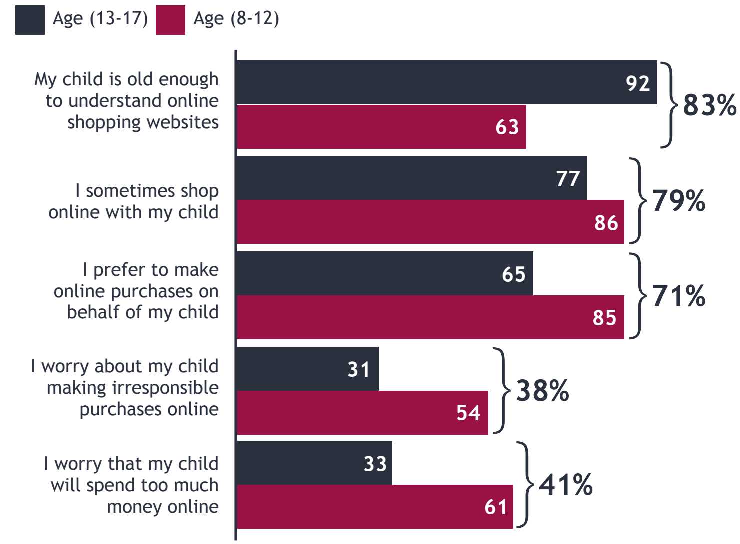


FIGURE 8D:

Attitudes toward online shopping (U.K. by child's age)

Percentage who agree with the following*



*Note: Weighted average

APPENDIX: ADDITIONAL CHARTS (cont'd.)

FIGURE 8E:

Attitudes toward online shopping (U.S. by child's gender)

Percentage who agree with the following*

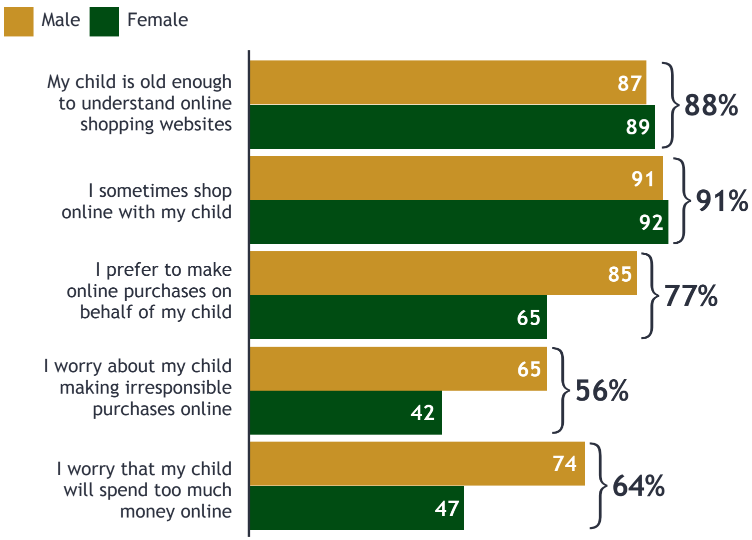
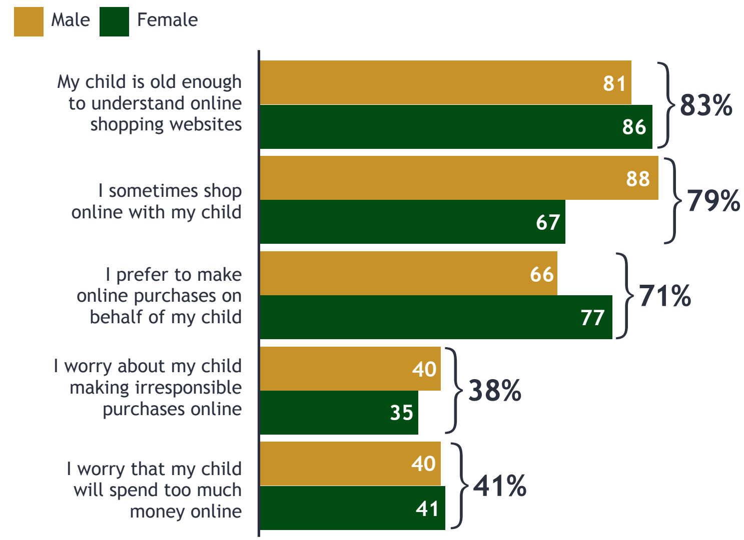


FIGURE 8F:

Attitudes toward online shopping (U.K. by child's gender)

Percentage who agree with the following*



*Note: Weighted average

APPENDIX: ADDITIONAL CHARTS (cont'd.)

FIGURE 9C:

Household responsibilities (U.S. by child's age)

Percentage who assign the following to their child

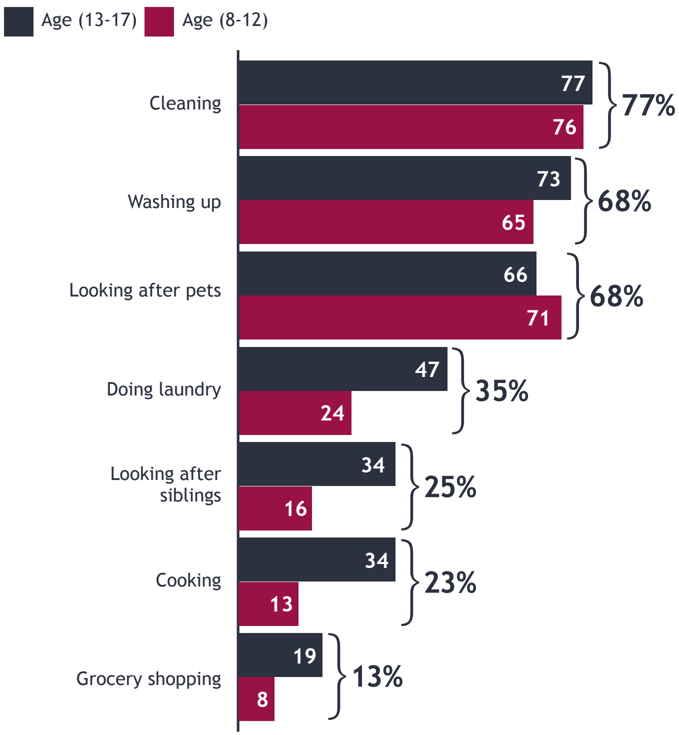
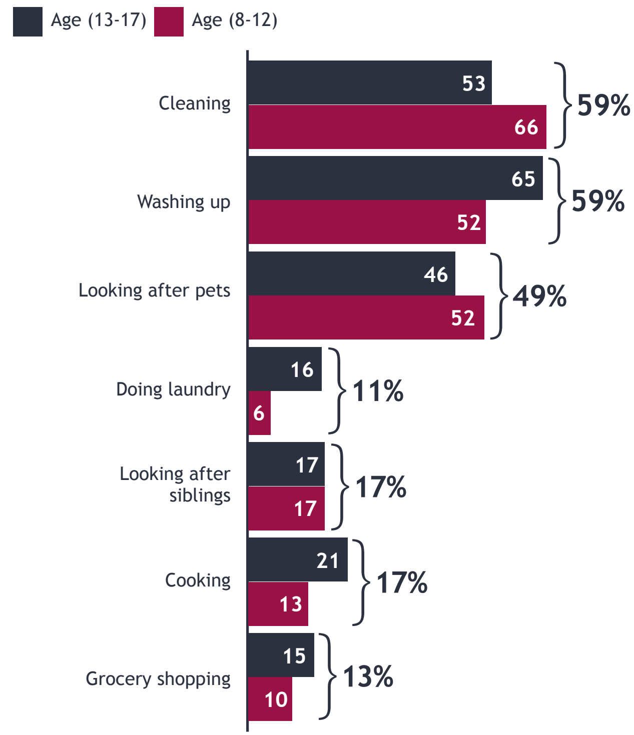


FIGURE 9D:

Household responsibilities (U.K. by child's age)

Percentage who assign the following to their child



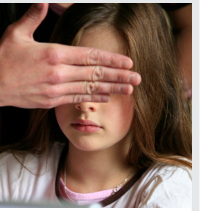


FIGURE 9E:

Teaching good habits (U.S. by child's age)

Percentage who assign their child responsibilities for the following reasons

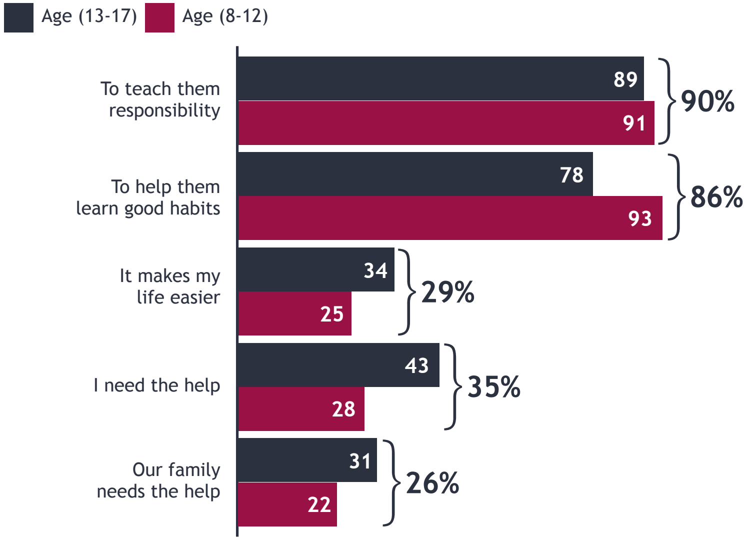
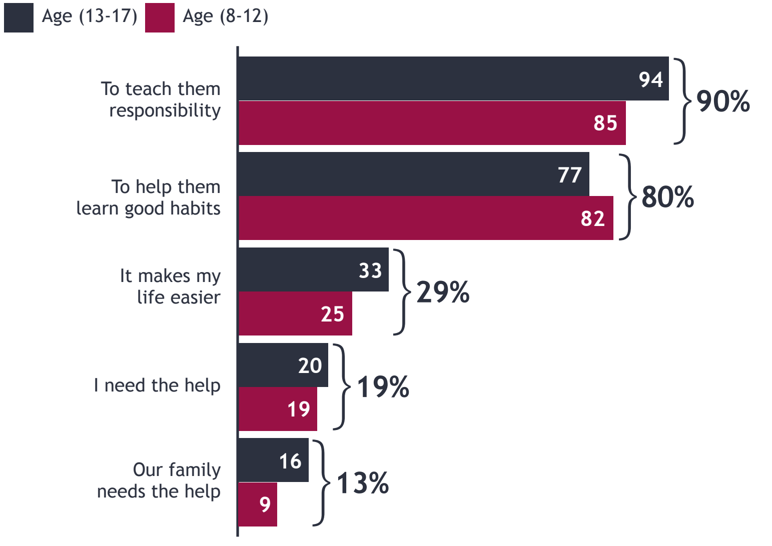


FIGURE 9F:

Teaching good habits (U.K. by child's age)

Percentage who assign their child responsibilities for the following reasons

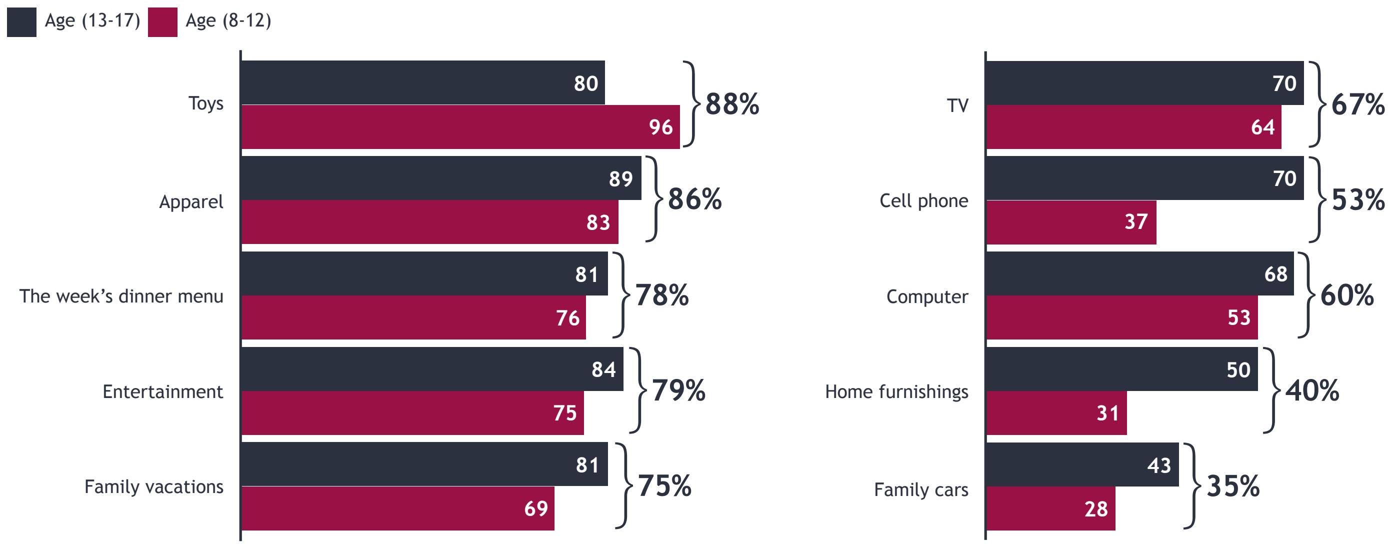


APPENDIX: ADDITIONAL CHARTS (cont'd.)

FIGURE 10B:

Areas of influence (U.S. by child's age)

Percentage who feel their child is influential when purchasing the following



APPENDIX: ADDITIONAL CHARTS (cont'd.)

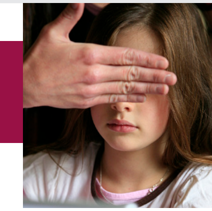
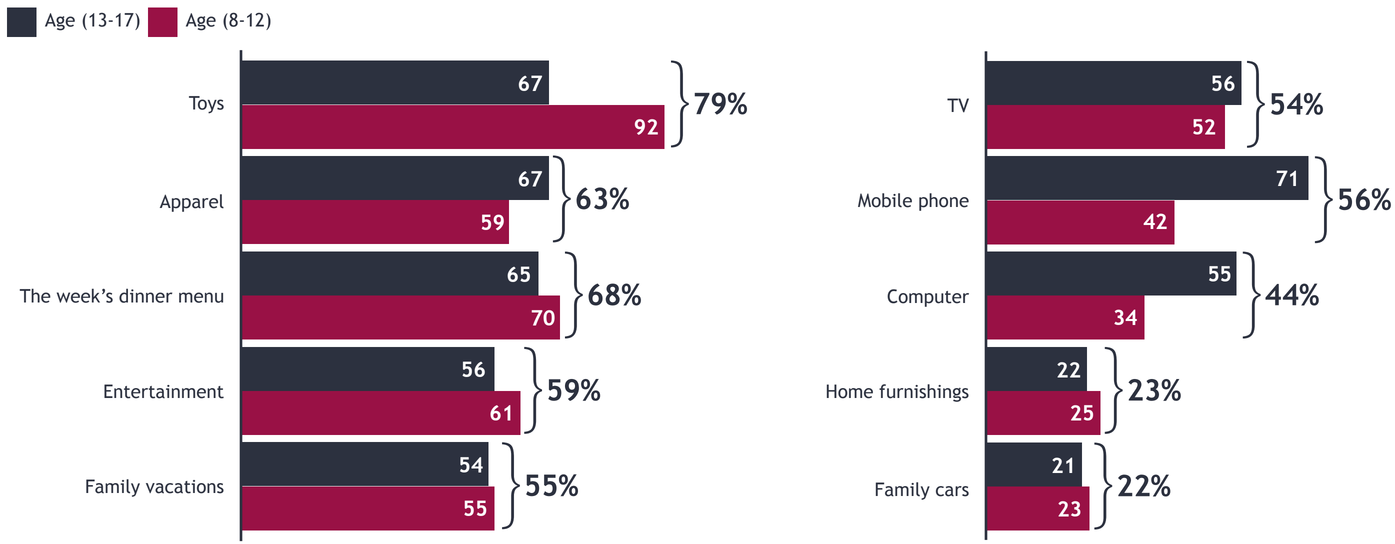


FIGURE 10C:

Areas of influence (U.K. by child's age)

Percentage who feel their child is influential when purchasing the following

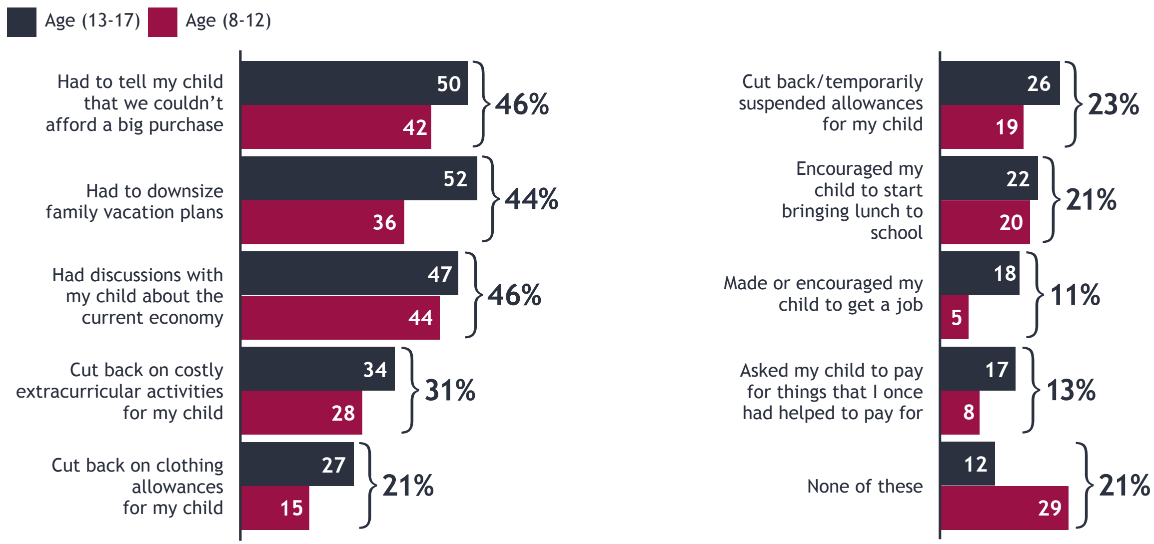


APPENDIX: ADDITIONAL CHARTS (cont'd.)

FIGURE 11C:

Economic adjustments (U.S. by child's age)

Percentage who have done the following



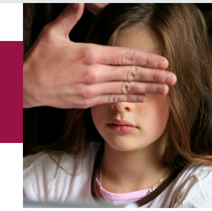
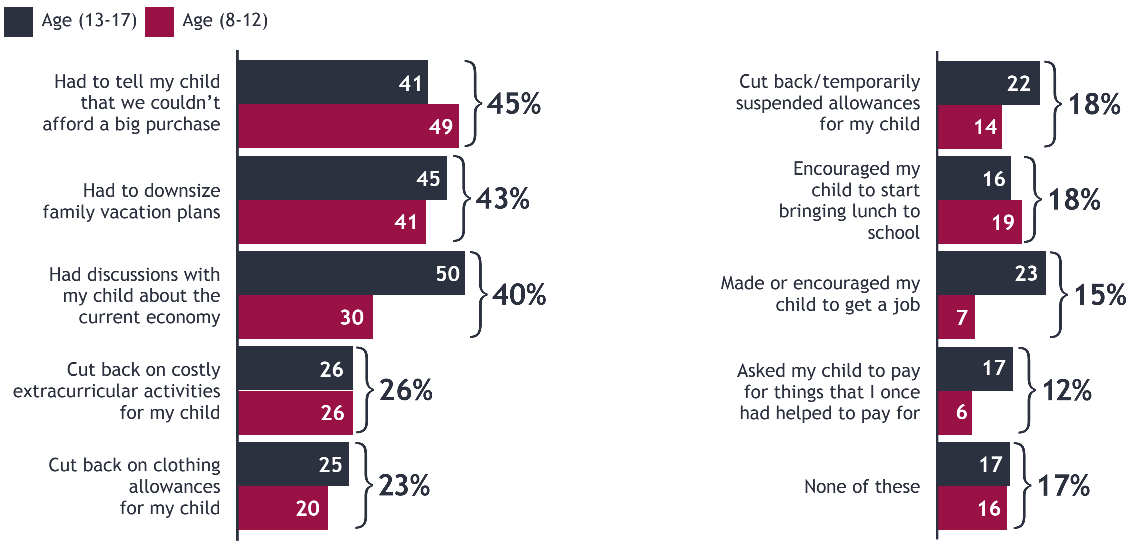


FIGURE 11D:

Economic adjustments (U.K. by child's age)

Percentage who have done the following



APPENDIX: ADDITIONAL CHARTS (cont'd.)

FIGURE 11E:

Fearful about the future (U.S. by child's age)

Percentage who agree with the following

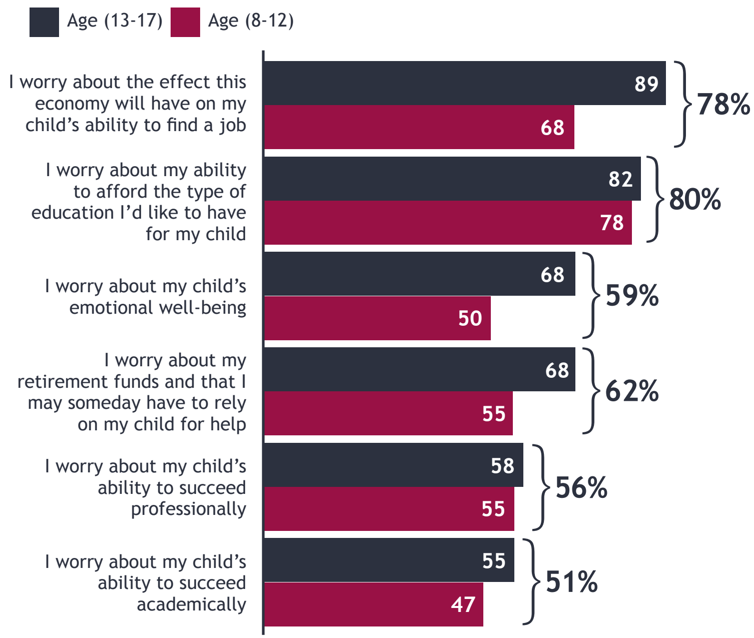
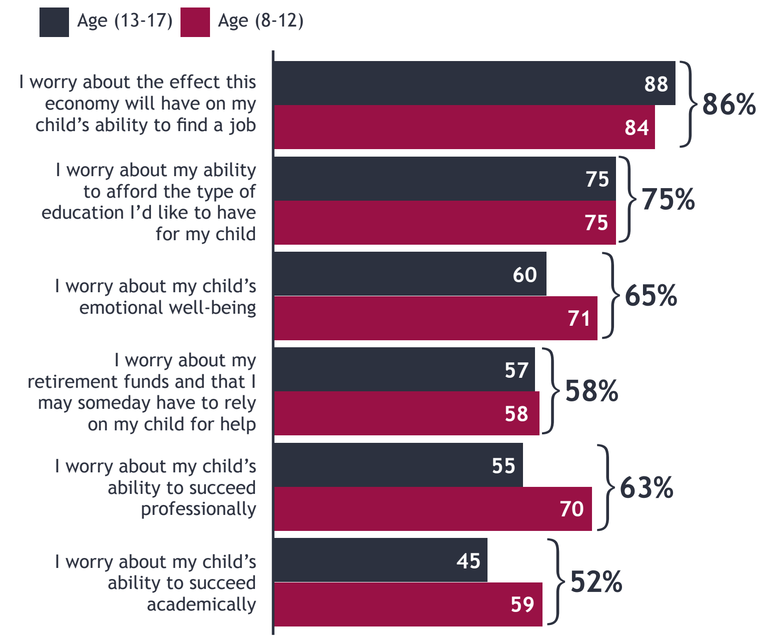


FIGURE 11F:

Fearful about the future (U.K. by child's age)

Percentage who agree with the following



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