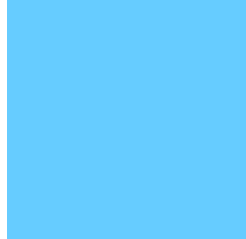
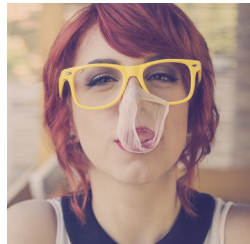


GEN Z

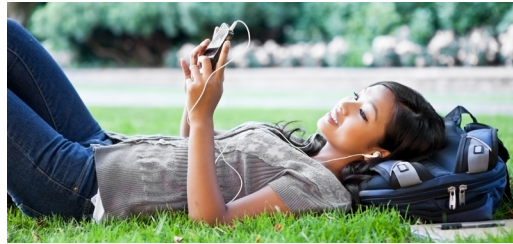
TECH DISRUPTION



2016 National Study on Technology and the Generation after Millennials



By
The Center for
Generational Kinetics
And Jason Dorsey



THE CENTER FOR
GENERATIONAL KINETICS®

JASON DORSEY

“The generation after Millennials, known as iGen, Gen Z and Centennials, will determine how every other generation ultimately uses technology.

This new generation, with no recall of 9/11 or a time before the Internet and mobile devices, is becoming the digital shepherd of a new era in technology adoption and reliance.

We call this new generation, Gen Z. They are not only the best preview of future generations but also reveal the behaviors older generations will eventually adopt when it comes to technology.

Much as Millennials changed every other generation’s dependence on social media, text messaging and digital downloading, Gen Z will do the same for wearable devices and dependence on the cloud for storage and computing.

Furthermore, their acceptance and usage of technology is likely to be more similar to that of peers in distant countries than grandparents in their own country.

What this means to every other generation remains to be seen, but what it means to those interested in generational change is that Gen Z has assumed the Millennials’ mantle of the generation to know, understand and engage.”

- Jason Dorsey,
Gen Z Expert and Chief Strategy Officer
The Center for Generational Kinetics



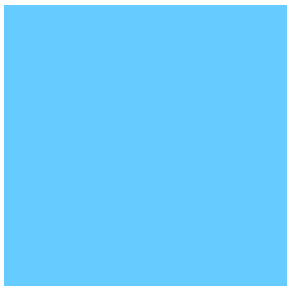


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MEET THE GENERATION AFTER MILLENNIALS:

GEN Z

Currently age 20 and under, this new generation goes by many names: iGen, Gen Z, Centennials, Founders and more.

While we prefer the term Gen Z, as it's a natural progression after Gen X and Gen Y (aka Millennials), the undisputed fact is that this generation is soon to be the fastest-growing generation in the workforce. They are already the super-majority generation in college and younger and the tastemakers of trends that affect all of us, especially when it comes to technology.

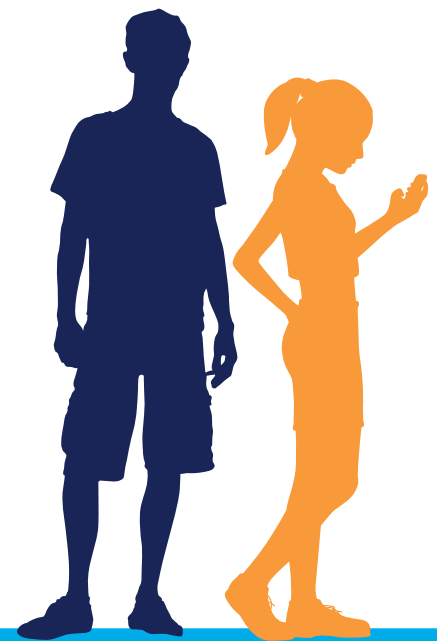
Gen Z's role and relationship with technology—from attitudes toward technology to true dependence on it—provides the best snapshot we have of future technology usage for each of us.

The generations before Gen Z, including Millennials, Generation X and Baby Boomers, will eventually adopt many of the technology habits and attitudes that Gen Z already views as normal. **This happens because, as we have uncovered, technology trends now ripple up: from the youngest adults to the oldest.**

Many people saw this firsthand as Millennials' reliance on social media, text messaging and mobile communications led other generations to adopt the same usage. Now employers, marketers and even policymakers are leveraging these technologies to better engage multiple generations at the same time.

Looking ahead, Gen Z also represents the best preview of future attitudes, beliefs and expectations about technology in the areas of privacy, security, dating, education, trust, work and so much more.

The Center for Generational Kinetics led this national study on Gen Z and technology to uncover what every generation of leaders, parents, managers, marketers and policymakers needs to know now—before the new generation fully exerts its change on the rest of us. Gen Z Tech Disruption is part of our 2016 Landmark Study Series on the Generation after Millennials, findings from which will be released throughout the year.



Looking ahead, Gen Z also provides us the best preview of future attitudes, beliefs and expectations about technology in the areas of privacy, security, dating, education, trust, work and so much more.

MEET THE GENERATION AFTER MILLENNIALS:

GEN Z

This head start in understanding is absolutely critical to preparing for, communicating with and influencing this new generation at a critical time in the reinvention of work, commerce and global connectivity.

Stay tuned for the next report in the **2016 Landmark Study Series on the Generation after Millennials**... there is much more to come!

The leaders who identify the challenge that Gen Z brings, along with the opportunity within that challenge, will be well positioned to understand and unlock the power of an entirely new generation before their competition does.

Please contact The Center to learn how we can solve your Gen Z challenge through research, strategy and solutions that drive measurable results for you.

Jason Dorsey
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[Click here](#) to watch the acclaimed TEDx video about the generation after Millennials.



HOW YOUNG IS TOO YOUNG FOR A SMARTPHONE?

Smartphones are the gateway to communication, learning, influence and even growing up! But what is the “right” age to get your first smartphone? This decision has never been more important, as a smartphone allows you to do nearly anything: connect with your peers, work on homework online, play video games, use social media, search for information online and have access to a world of good and bad influences, as well as the latest entertainment.

“The age at which you get your first smartphone is more important than the age at which you get your driver’s license.”

- Jason Dorsey

So how young is too young for getting your first smartphone? In our national study, we found out that the answer depends entirely on YOUR generation.

What we uncovered shows adults’ natural resistance to giving too much power and freedom to youth, along with young people’s belief that they not only can handle a smartphone, but that their life experience may depend on it more than ever before.

This is true to Gen Z, because once you get into high school, so much of the social chatter is digital chatter. It’s no longer just about Mom or Dad expecting you to answer their calls—since if they’re Millennials or Gen X parents they’re probably texting you instead of calling anyway. Smartphones have also become central to the ability to socialize at all. After all, who talks on phones anymore?

Having your own smartphone is not simply a status symbol either in the way it was for many Millennials. The price of basic smartphones has dropped tremendously and affordability has increased through options such as leasing the phone, replacing voice minutes and the availability of more non-voice options, such as texting, surfing the Internet and messaging apps.

Combine this new reality of dependence on smartphones and it’s clear to see that getting your first smartphone truly is a game changer, socially and otherwise for Gen Z. So what is the right age in terms of maturity, responsibility, digital freedom and more to have access to the world in your pocket?

In our national study of all four generations, Gen Z said that you should receive your first smartphone at an earlier age than any previous generation.



HOW YOUNG IS TOO YOUNG FOR A SMARTPHONE?

In fact, 18% of Gen Z said you should receive your first smartphone at age 13! That means they believe you should have your first smartphone while you are still in middle school or junior high. What does this expectation mean for social pressure, cyber bullying and parents trying to filter what their kids see or don't see? That remains to be seen.

Going further into the data, we found that Gen Z is four times more likely to say that you should receive your first smartphone at age 13 than the average of the other generations. In fact, the data shows that Millennials, Gen X and Boomers on average think you should receive your first smartphone at age 18!

WHAT IS THE APPROPRIATE AGE TO HAVE YOUR FIRST SMARTPHONE?



How different are Millennials from Gen Z on this key digital marker of adolescence? Twenty-six percent of Millennials think you should receive your first smartphone at age 18, whereas only 6% of Gen Z think you should receive your first smartphone at this same age.

Looking at the data, it appears that Millennials, the first truly tech-dependent generation, are starting to view technology more in line with the way their parents do. That is a shocking finding—almost as shocking as so many members of Gen Z thinking you should get your first smartphone at age 13.

Will this Millennial attitude toward technology continue with them looking more and more like their Baby Boomer parents in terms of providing technology to their kids? That remains to be seen, but we think it is likely given that Millennials are having kids at an older age than previous generations. That means the 13-year-old will likely be asking for a smartphone—or the newest device—when her Millennial parents are age 40 or potentially older.

On the flip side of trendsetting, if Gen Z thinks they should have smartphones at a younger age than any previous generation, does this mean they will become trendsetters at an even earlier age, too? If so, they'll have more years of experience with mobile technology by the time they reach age 18 than any previous generation, which gives them more opportunity to become dependent on the technology, affect other generations and become less likely to go back to earlier methods of communicating such as email or snail mail.

HOW YOUNG IS TOO YOUNG FOR A SMARTPHONE?

Young people today have come of age seeing their parents—who are Millennials and Generation X—glued to their own smart devices while eating, driving, working and even running. Kids see this behavior modeled by their parents and they want to replicate it because “that’s what adults do” and because they want to foster a sense of connection with adults. If an adult is always glued to a smartphone, the kid can figure out that sending a text message or WhatsApp message can get a faster response from Mom or Dad than actually trying to talk to them—even if they’re all in the same house at the same time.

Additionally, the younger you are when you want a smartphone, the more disconnected you can become from the cost of obtaining that smartphone. A 13-year-old can be quite disconnected from the amount of work or money required to buy and maintain a phone. This disconnect makes having a smartphone at

age 13 seem even more normal if the work or responsibility that goes into earning a phone is absent and there is only an expectation or sense of entitlement that they deserve a phone because their friends and parents have one.

The same idea holds true when considering other realities facing Gen Z. Having a phone at least allows you to see what others are saying and gives you the option of responding, but it also opens Gen Z to additional scrutiny and the epidemics of sexting and cyber bullying affecting many high schools.

Our Take: We believe that, as smartphone usage becomes ever more integral to basic functions in our society, it will continue to become completely normal to have access to these devices at a younger and younger age. It will soon be commonplace for elementary school children to have them.



HOW YOUNG IS TOO YOUNG FOR A SMARTPHONE?

Findings:

- Gen Z expects you to get your first smartphone younger than any other generation.
- Millennials look a lot more like Baby Boomers when it comes to their expectations around young people and smartphones.
- Gen Z has had more exposure to smartphones than any previous U.S. generation.

Impact:

- Gen Z is open to more positive and negative influences earlier because of smartphone access.
- Peer pressure, cyber bullying and tech dependence all increase the earlier that smartphones are normalized, but once it is normalized, it can potentially do more harm not to provide your teenager a smartphone.
- Gen Z will be the driver of smartphone trends from banking and dating to learning and communication.

Discussion Questions:

- What if the age at which you get your first smartphone continues to decrease? Will nine-year-olds eventually have their own smartphones?
- How does getting your first smartphone at such a young age affect your view of the world and how you access information?
- Do you think Gen Z will be more or less tech savvy than Millennials when it comes to mobile technology?

Learn More:

- GenHQ.com/Gen-Z
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GEN Z IS CHANGING SHOPPING FOREVER

The very definition of shopping is changing as the digital world merges with the brick-and-mortar world to create a blurred shopping reality where stores are always open, inventory is always available somewhere and Amazon just might deliver within hours of you placing your order.

This new shopping reality is ALL Gen Z has ever known.

Gen Z has always known Amazon as an online retailer and not a river in South America. Gen Z has always gone to YouTube for makeup and fashion advice. And Gen Z has always thought that carrying cash or checks was outdated—and so might be that credit card in your wallet.

“Gen Z does not remember a time when the word ‘Amazon’ conjured up a vision more exotic than that of an online retailer.”

-Jason Dorsey

But what does all this mean to the world of retail and how does it differ by generation? In our national study of Gen Z, technology and shopping, several clear differences were uncovered along with some unexpected similarities.

For the first time ever in one of our national studies, we had 100% of every generation answer a question the same way. The finding: 100% of EVERY generation said they would surf the Web on their phones looking for a better price when in a retail store or speaking with a salesperson face to face. 100%!

REAL-TIME MOBILE COMPARISON SHOPPING IS NOW THE STANDARD ACROSS GENERATIONS

100% of EVERY generation said they would surf the Web on their phones looking for a better price when in a retail store or speaking with a salesperson face to face.

100%!



GEN Z IS CHANGING SHOPPING FOREVER

Digging further into the findings based on specific scenarios, we started to find interesting differences between how Gen Z and other generations approach shopping and technology. One of the most surprising differences is that Gen Z is more like Millennials when it comes to surfing the Web for a better price. These two youngest generations are much more likely than Baby Boomers and even Generation X to surf the Web looking for a better price. For example, we asked each generation if they would surf the Web on their phone to look for a better price or other options while shopping at a retail store for a laptop computer or tablet. These were the results of those who said they would:

- Boomers: 34%
- Gen X: 45%
- Millennials: 56%
- Gen Z: 50%

Notice that 50% or more of Gen Z and Millennials responded that they would, whereas less than 50% of Gen X and Boomers would. What makes this all the more impressive is that, when it comes to the Gen Z group that was surveyed, they are currently age 14 to 19! Think about that: these are teenagers saying that they would already search the Web using their phone before making a technology purchase.

“This expectation of comparison-shopping by Gen Z is an important trend because we predict that this will only continue to increase. As Gen Z enters adulthood and starts spending their own hard-earned money, they’re likely to spend even more time trying to make the most of it as consumers.”

-Jason Dorsey

The ease with which Gen Z can now comparison shop, whether by describing the product, scanning a bar code or even taking a picture, lends itself to their naturally taking that extra few seconds to see their options before making a final purchase decision.

This has been exacerbated with the oldest members of Gen Z being in middle school during the Great Recession. This generation is old enough to see, recognize and feel an emotional connection to the financial troubles facing Millennials as well as Gen Z’s own parents and grandparents. The increased wallet watching of this period influenced how the oldest members of Gen Z view money, spending and shopping. This difficult period dramatically affected Gen Z’s parents, who likely adopted new saving or spending habits and thus passed those on to their Gen Z children.



GEN Z IS CHANGING SHOPPING FOREVER

Some experts say that Gen Z cares more about price and quality than brand, but we are not yet sure that this is the long-term consideration hierarchy for them. It is clear, however, that price and quality are a big consideration—possibly even more than brand. What we are sure about is the ease with which Gen Z can search for pricing information and the reality that money can be tight and jobs can be scarce, along with the ease with which Gen Z can track their money and spending in real time, make them the perfect generation to be cost-conscious and double-check their purchases before making them.

This reality will affect retailers forever as Gen Z exerts increasing influence over pricing, selection, ratings, reviews and more. The power of retail has truly transferred from the retailers, brands and merchants directly to the fingertips of Gen Z. This will likely continue to increase as Gen Z starts earning and spending their own money and move increasingly, albeit slowly, toward financial self-reliance. As financial self-reliance in the form of starting to pay for their own housing, transportation, meals and more grows, so too does the connection between spending in all areas and the desire to stretch the value of every dollar.

An underlying discovery is that Gen Z has come of age in a time when they have never had to pay retail price. Whether it was on bidding websites, discount websites, endless sales and promotions or loyalty rewards, paying retail was not a necessary part of their experience—but getting something at a discount was, and this is now part of their consumer expectation.

Going further, we believe that virtual reality will drive an even greater transformation on Gen Z's retail experience by allowing them to try a product not just before they buy it but without even the need to drive across town to engage in showrooming. No longer is any of that necessary and Gen Z is exactly the right generation to make virtual reality shopping the only type of shopping.

Our Take: We believe that this new, empowered generation of consumers opens the door for start-ups and small businesses if these companies can offer quality items in the online marketplace alongside brands. It will require these enterprises to have an online presence, but we've already seen the possibilities of this with sites like Etsy. Small businesses are no longer constrained by geography, which opens up a whole world of options but also poses a danger for local brick-and-mortar businesses. Shopping in stores will become more of a pastime, a recreational and possibly even social activity, with the bulk of real buying taking place online.



GEN Z IS CHANGING SHOPPING FOREVER

Findings:

- Gen Z has come of age comparison-shopping on their smartphones.
- Gen Z comparison-shops online more than Generation X or Baby Boomers.
- Gen Z is the first generation to come of age when the power has truly shifted from the brands, marketers and retailers to the consumer.

Impact:

- Comparison-shopping by mobile device is next-generation shopping.
- Virtual reality will be the next game-changing technology that Gen Z shoppers lead.
- Gen Z may become even more conservative with their consumer spending as they enter adulthood and become more financially self-reliant.

Discussion Questions:

- How do you think comparison-shopping will change once Gen Z shoppers start spending more of their own money?"
- Have you noticed that Gen Z is more concerned about price and quality than brand? Or have you seen Gen Z have a different order of priorities when buying?
- How do you think virtual reality will most change shopping starting with the youngest generation?

Learn More:

- GenHQ.com/Gen-Z
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TENS OF MILLIONS OF GEN Z SAY SOCIAL MEDIA DETERMINES THEIR HAPPINESS, WELL-BEING AND SELF-ESTEEM

Gen Z cannot remember a time before social media.

In fact, social media is not media at all to Gen Z but, rather, the medium for connecting, learning, showing off, expressing oneself, debating, dating and so much more. Social media is the medium that connects Gen Z to the world around them and connects the world to Gen Z, more than any other channel or communication option.

Given that social media is the channel where Gen Z connects, forges relationships, learns and documents every aspect of their lives, what role does social media play in determining Gen Z's happiness, self-esteem and well-being?

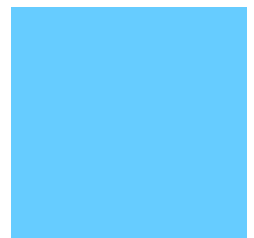
Does social media really affect how Gen Z thinks other people see them, their job prospects, dating and more?

"Tens of millions of Gen Z say social media determines their happiness, well-being and self-esteem. This impact will likely only grow as Gen Z gets older and has more freedom when it comes to their social media experience. In short, if you think social media is important to Gen Z now, just wait another five years."

-Jason Dorsey

As part of our landmark study on Gen Z, we dove into the world of social media to explore how Gen Z views social media, how Gen Z's views compare to those of other generations, and what Gen Z thinks about social media's impact on their own lives.

The findings are telling about both our society and this new generation—the sum of which will affect each of us.



TENS OF MILLIONS OF GEN Z SAY SOCIAL MEDIA DETERMINES THEIR HAPPINESS, WELL-BEING AND SELF-ESTEEM

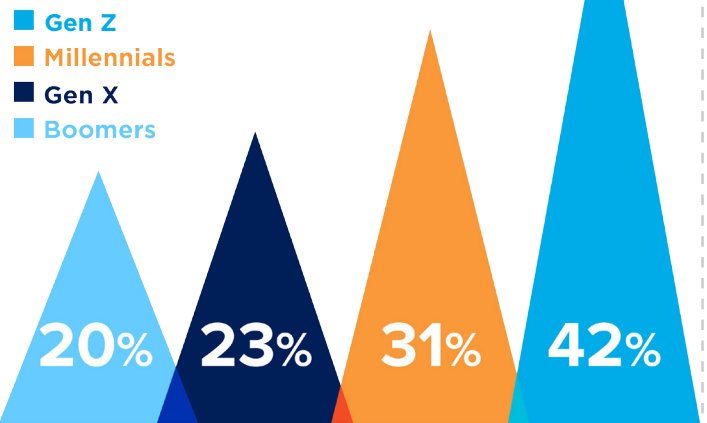
Finding 1: Forty-two percent of Gen Z, more than any other generation, says social media affects how people see you. This “outside looking in” assumption affects what Gen Z posts, how they think about social media as a tool for making a statement and the fact that the world looks at you through the prism of social media. In fact, our national study found that Gen Z is twice as likely as Baby Boomers to say that social media affects how people see you and scores 5 percentage points higher than even Millennials, who were the pioneers of social media.

Finding 2: The influence of social media on how people see you extends all the way into how Gen Z thinks about their popularity. Twenty-nine percent of Gen Z, more than any other generation, says that social media affects your popularity. For context and true generational divergence, Gen Z is three times more likely to say that social media affects your popularity than Baby Boomers and twice as likely as Generation X. This is a dramatic divergence among the four generations sharing some stage of adulthood at the same time.

Finding 3: The clear external impact and influence of social media on Gen Z has taken root in how they think about social media and their own well-being. Gen Z, more than any other generation, says that social media affects how you feel about yourself. In fact, 42% of Gen Z says this. The study found a significant gap in this area between Gen Z and Millennials, which is likely due to the fact that Gen Z’s entire life has been featured on social media—whether it was their Gen X and Millennial parents posting about them or Gen Z themselves literally growing up on their preferred social media platform. Case in point: Gen Z is more than twice as likely as Boomers to say that social media affects how you feel about yourself and scores more than 10 percentage points higher than Millennials!

HOW YOU FEEL ABOUT YOURSELF

42% of Gen Z feels that social media has a direct impact on how they feel about themselves. This is more twice the number of Boomers!



TENS OF MILLIONS OF GEN Z SAY SOCIAL MEDIA DETERMINES THEIR HAPPINESS, WELL-BEING AND SELF-ESTEEM

Finding 4: Just how deep does the influence of social media go into the psyche of Gen Z? A full 37% of Gen Z, more than any other generation in the national study, says that social media affects your happiness! Going further, 39% of Gen Z reports that social media affects your self-esteem. It's clear that the impact that social media already has on Gen Z, the oldest of whom are now barely exiting their teen years, will likely only increase as they express themselves more freely on social media and live more adult moments on the social media platforms that are creating ever-growing links between them and others.

Finding 5: When it comes to the real world converging with social media, Gen Z and Millennials are even in how much they think social media affects your job prospects, with 33% believing that it does so. However, 38% of Gen Z, slightly more than the 34% of Millennials, believe that social media affects your influence. For comparison, the national study found that Gen Z and Millennials both believe that social media affects your influence more than twice as much as Baby Boomers do.

Finding 6: The one area where Gen Z really outshines the other generations in believing that social media affects their world is dating. Twenty-seven percent of Gen Z says that social media affects your dating prospects. This is more than any other generation in the national study, four times as high as Baby Boomers and double the response of Generation X!

The bottom line: Social media has more of an impact on Gen Z than any on other generation in American history. The question is how Gen Z's relationship with social media will evolve as Gen Z moves further along the transition into adulthood. Will social media become the through-line that connects every area of their lives forever, or will Gen Z choose to limit what they post on social media as they get older?

What we do know is that social media has made the already awkward adolescent years even more difficult for Gen Z than other generations as the typical challenges of peer pressure at school, social status and bodily change are all available and direct to your social media feed 24/7/365.

Our Take: As Gen Z grows, giving more weight to social media and its capacity to influence personal lives, we believe that this trend will spread not only to the younger members of Gen Z but also to older generations. Much like technology use, this is a trend that will trickle upward. Soon Grandma will find more of her happiness and self-esteem affected by social media.



TENS OF MILLIONS OF GEN Z SAY SOCIAL MEDIA DETERMINES THEIR HAPPINESS, WELL-BEING AND SELF-ESTEEM

Findings:

- Gen Z says that social media drives key external influences more than any other generation, including how people see you, your popularity and your perceived influence.
- Gen Z says that social media affects them internally more than any other generation, including their own happiness and self-esteem.
- Gen Z says that social media affects their real-world experience, including job prospects and dating, more than any other generation.

Impact:

- Social media has a greater effect on Gen Z internally than any previous generation, something parents and all adults need to know.
- Social media has a greater effect on Gen Z externally than any previous generation, something marketers, employers and leaders need to know.
- Social media is clearly the best way to reach and influence this new generation given the tremendous importance they place on it in virtually every aspect of their lives.

Discussion Questions:

- Do you think that parents and schools should spend more time teaching Gen Z how to use social media responsibly? Or do you think it is up to Gen Z to figure out what works for them?
- What do you think are the biggest tradeoffs for Gen Z spending so much time on social media?
- How do you think Gen Z's reliance on social media will affect how they work and interact in the workplace?

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WHICH SOCIAL MEDIA PLATFORM DOES GEN Z PREFER?

Knowing that Gen Z has come of age with social media options ranging from the more traditional, such as Facebook and LinkedIn, to the newer options, such as Vine and Secret, which ones do Gen Z actually prefer? Do they prefer social media that has been proven to be the first choice of the trendsetting Millennials who showed just how mighty social media could be? Or does Gen Z prefer to pave their own path and want to become early adopters of newer social media outlets even before critical mass is reached?

Our national study revealed a generation with some clear preferences and definite divides when it comes to which social media platforms they prefer to use—and which they think is best for their own generation.

“Gen Z may not think Facebook is cool, but they are definitely not abandoning it. However, they are seeking out other platforms that better fit them and have less usage by their parents!”

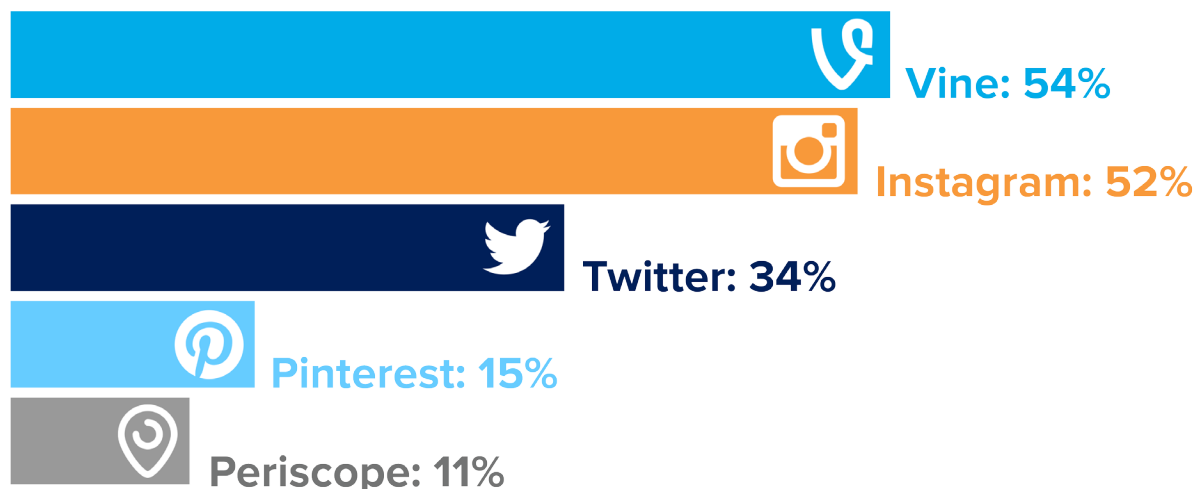
-Jason Dorsey

When we asked Gen Z across America to rank the social media platforms ideal for people under age 20, those who are technically in Gen Z, we found some surprises. Below are the top five social media platforms ranked by Gen Z as most ideal for Gen Z. Note the drop-off after number three:

- Vine: 54%
- Instagram: 52%
- Twitter: 34%
- Pinterest: 15%
- Periscope: 11%

GEN Z SOCIAL MEDIA PLATFORM PREFERENCES

We asked Gen Z across America to rank the social media platforms ideal for people under age 20. What we found was surprising. Below are the top five social media platforms ranked by Gen Z as most ideal for Gen Z. Note the drop off after number three:



WHICH SOCIAL MEDIA PLATFORM DOES GEN Z PREFER?

Going further regarding the social media experience of Gen Z, the national study also asked which social media platforms Gen Z has never heard of. Again, the results were interesting given the percentage of Gen Z that had not heard of certain platforms.

- 74% of Gen Z has never heard of Secret.
- 62% of Gen Z has never heard of Periscope.
- 34% of Gen Z has never heard of LinkedIn.

Before you think that Gen Z is behind the times, consider the percentage of Gen Z who has not heard of these outlets compared to the percentage of Boomers who have not heard of these social media outlets:

- Never heard of Vine: 6% vs 65% of Boomers
- Never heard of Periscope: 62% vs 76% Boomers
- Never heard of LinkedIn: 34% vs 14% Boomers
- Never heard of Instagram: 2% vs 9% Boomers
- Never heard of Pinterest: 8% vs 16% Boomers

However, before Mark Zuckerberg starts to worry about Facebook's role in the future of Gen Z, the national study found that 13% of Gen Z think that Facebook is ideal for their generation, while a strong 44% of Gen Z said that Facebook is good for any age—from their own generation to their grandparents' generation. While this clearly means that Gen Z does not think Facebook is the coolest social media platform in the world, with a combined 57% of Gen Z saying Facebook has a place in the social media space for their own generation, the death knell that the media likes to sound about it may be a bit hasty.

The results for the social media preferences of Gen Z clearly show a divergence from other generations, especially as the age gap between Gen Z and the other three generations, Millennials, Generation X and Baby Boomers, increases. This could be due to when the social media platform was introduced, wanting to be different from their parents or grandparents or simply a preference in the user experience that Gen Z wants to choose to spend most of their time on a specific social media platform.

Our Take: Gen Z has a voracious appetite for social media and a willingness to try basically any new platform. This will sustain the trend of creating and introducing new platforms. However, the fact that Gen Z also doesn't completely abandon older platforms like Facebook means that there will be a few industry veterans alongside a few hot new start-ups and a number of fizzles in-between.



WHICH SOCIAL MEDIA PLATFORM DOES GEN Z PREFER?

Findings:

- Gen Z has markedly different social media preferences than other generations, with the divergence increasing based on the age gap from Gen Z to the generation being compared.
- Gen Z prefers Vine, Instagram and Twitter much more than other social media platforms.
- Facebook is not dead with Gen Z, but it's not as hot as Gen Z's preferred social media options.

Impact:

- If your business is built on Facebook, it's urgent that you extend your brand and build your following on Gen Z-centric outlets such as Vine and Instagram.
- Gen Z is not following in the social media paths of their parents and previous generations, which creates opportunities for new brands to skip traditional social media channels and just start where Gen Z is now.
- While Gen Z may not know all the latest social media options, they know about the social media options significantly much more than other generations, so make sure you reserve your brand's name on every outlet even if you only plan one post per month.

Discussion Questions:

- What social media platform do you use the most? How does that compare to what Gen Z prefers to use?
- Which of the social media platforms that Gen Z uses the most do you use the least?
- What do you think is the risk to employers and marketers if they are not using the social media platforms that Gen Z prefers to use?

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PHONE ETIQUETTE: LOST ART OR GENERATIONAL DIVIDE?

How and when Gen Z uses their smartphones is a hot topic for older generations. Is Gen Z rude in using their phone at all the wrong times or is that simply a myth that has taken on the appearance of truth given the emotional response it engenders from older people?

The national study asked each generation when they think it is appropriate and when it is not appropriate to use a smartphone for talking, texting and surfing the Web. The survey responses were analyzed by generation and situation to determine whether Gen Z truly abides by a different standard of accepted phone etiquette than other generations.

The overall result: the old timers were right—most of the time. In many categories and situations, Gen Z is more likely than Millennials, Generation X and Baby Boomers to think it is acceptable to use their phone in any manner. However, there was one glaring exception: in the workplace.

“Gen Z has been using phones, usually their parents’ and grandparents’ phones, for longer than most of them can actually remember. Now they’re taking their relationship with phones into situations that other generations cannot believe are acceptable, including their own weddings and job interviews.”

-Jason Dorsey

Before we dive into the work-related responses, consider that Gen Z, more than any other generation, said that it was more acceptable to use their phone in any manner while:

- Riding a bike
- Running on a treadmill
- During a religious service (!)
- While eating dinner with your family
- When meeting your significant other’s parents for the first time
- During a job interview (!)
- While having dinner with a date
- During your own wedding ceremony (!)
- When applying for a home loan

In fact, in a real doozy of a response, Gen Z said that they are more concerned about using a phone during a movie than during their own wedding, someone else’s wedding or a religious service while the service is going on! While only 4% of Gen Z feel it’s appropriate to talk on the phone in a movie theater during a movie, 9% feel it’s appropriate to talk on the phone during a wedding ceremony and 10% feel it’s appropriate to talk during their **own** wedding ceremony! It appears that all those movie warnings about turning off your phone must have really stuck with Gen Z. That, or they don’t think the dark background would make for a good selfie.

PHONE ETIQUETTE: LOST ART OR GENERATIONAL DIVIDE?

However, the real shocker of the study was revealed when it came to acceptable phone usage at work. We found that Gen Z is more reserved about their phone usage in the workplace than any other generation! That's right. While 15% of Gen Z, more than any other generation, said that it is acceptable to use their phone during a job interview, only 6% of Gen Z, a smaller percentage than any other generation, said it was acceptable to use their phone in any way while at work.

The results speak for themselves:

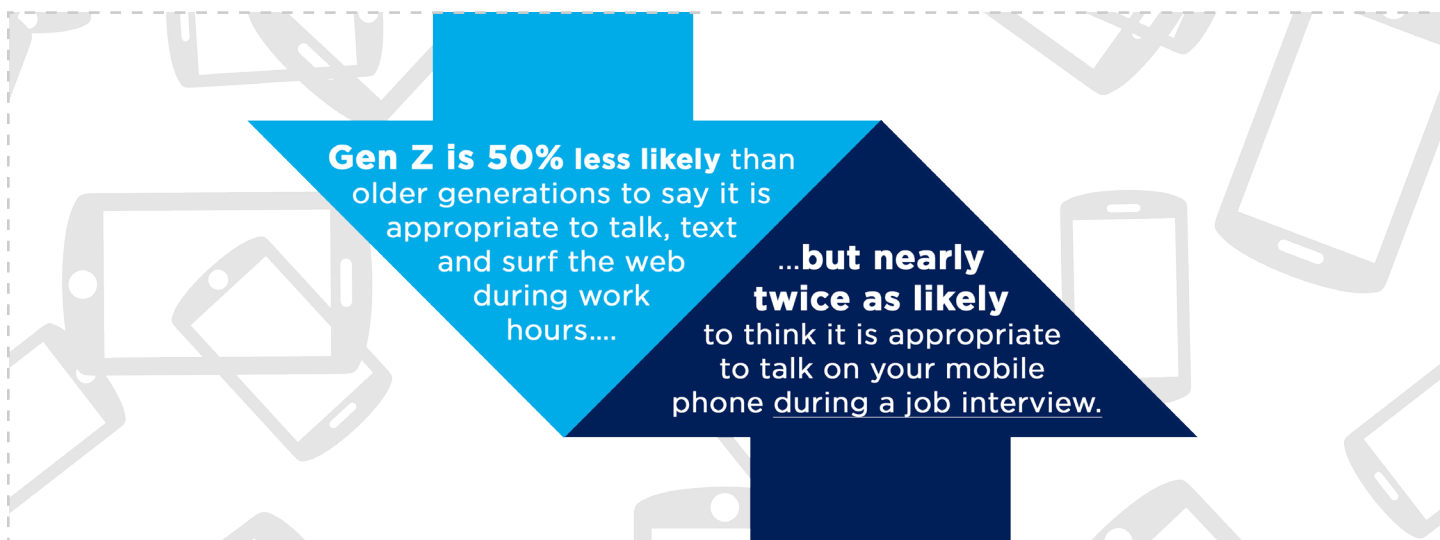
Percentage of each generation who think it is appropriate to talk, text and surf the Web during work hours:

- Boomers: 12%
- Gen X: 14%
- Millennials: 18%
- Gen Z: 6%

That's right, only 6% of Gen Z think it's okay to talk, text or surf the Web in any way at work. The affirmative response from Millennials was the highest of any generation and three times more than the affirmative response from Gen Z.

The net result is that a larger percentage of Gen Z than any other generation think it's okay to use their phone in virtually every social setting imaginable. Conversely, a larger percentage of Gen Z than any other generation think it's not acceptable to use their phone in any way at work.

Our Take: We suspect that these two divergent findings will start to look more similar. As phones become more and more ingrained in every part of society and as technology is created to make communication with these devices more seamless, older generations will start to use them as freely as Gen Z (though perhaps not during a job interview). As Gen Z enters the workplace, its members will start to ease up a little on their altruistic ideas about the smartphone's place at work. Before long, they'll be chatting, texting and surfing away with the rest of America's workforce.



PHONE ETIQUETTE: LOST ART OR GENERATIONAL DIVIDE?

Findings:

- Gen Z, more than any other generation, thinks that it is acceptable to use their phones in social settings.
- Gen Z, more than any other generation, thinks that it is not acceptable to use their phone during work.
- Gen Z's belief about the acceptable usage of their phone is likely still evolving, but in some areas, they look more like Baby Boomers and Generation X than Millennials.

Impact:

- Organizations will need clear and visible policies about acceptable phone usage in situations they might not have previously considered, such as in gyms and during religious ceremonies.
- Weddings and other social settings are clearly places where Gen Z wants to use their phones, so those hosting the event should make it easy for participants to participate using their phones, such as designating hashtags for a wedding.
- Companies must recognize that Gen Z is going to be bringing their cell phones to work and that, as Millennials move into management roles, what is deemed acceptable phone usage in the workplace could change even if Gen Z doesn't drive the change.

Discussion Questions:

- In which of the situations Gen Z thinks phone use is acceptable do you think phone usage is absolutely not acceptable?
- What about the Gen Z phone usage results most surprised you? What did you find the least surprising or most validating of your previous observations?
- When it comes to phone use in the workplace, what do you believe should be the guidelines you would give a new Gen Z employee?

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WHAT GEN Z THINKS ABOUT ONLINE PRIVACY

Gen Z is not the first generation of digital natives; that mantle belongs to Millennials. However, Gen Z holds a potentially more powerful tag line: the first true cloud-based generation.

Gen Z is coming of age with their storage in the cloud, whether it's photos and social media or working collaboratively on school projects. This dependence on digital connectivity and the cloud as a repository for information means that Gen Z has always had experience making their private information in some form or fashion necessary to use online.

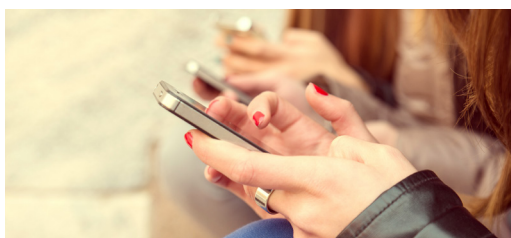
"Millennials may have been the first digital natives, but Gen Z brings a more powerful native relationship: cloud-based computing. This untethered relationship to information gives them more native freedom, computing muscle and influence than Millennials. It also gives them a different natural viewpoint on what is most important when it comes to technology solving your problems."

-Jason Dorsey

Gen Z is also coming of age in a time when hacking is no longer just done by techies in a basement but is now even led by entire countries and has been the subject of numerous movies and news headlines. Given that Gen Z has always been online, which means that they have always been digitally vulnerable, what do they think about online privacy?

Our national study revealed an interesting change taking place across generations.

Gen Z is more concerned about online privacy than Millennials but less concerned about online privacy than Generation X or Baby Boomers. Going further, if we extend online privacy to include other areas of privacy, we begin to see divergence between Gen Z and Millennials. For example, the study found that 63% of Gen Z is concerned when it comes to protecting their identity when paying with a debit or credit card online or in a retail store. This is more than Millennials, 58% of whom said the same. More than half of Gen Z is concerned about online privacy when using dating websites or mobile apps, while only 42% of Millennials are concerned about the same. In fact, Gen Z is more concerned than any other generation!



WHAT GEN Z THINKS ABOUT ONLINE PRIVACY

Extending online privacy further, Gen Z is more concerned than Millennials about protecting their identity when sending and receiving messages. Thirty-eight percent of Gen Z expresses concern over this, while only 29% of Millennials have the same concern. This increased concern for privacy goes all the way into the day-to-day reality of Gen Z and their education. A full 38% of Gen Z are worried about protecting their online privacy and security when at school.

But here is the twist...

Of all the generations, Gen Z has the LEAST concern about their privacy of any generation when it comes to paying with mobile apps, such as Venmo, and using social media.

This is particularly true when comparing Gen Z's responses to the composite of the other three generations. The reality that Gen Z has less fear than any other generation in these areas could support why Gen Z has been the fastest adopters of mobile payment apps as well as social media. Whereas Gen Z has basically always known these two options to be a part of their coming-of-age experience, every other generation has come to them later in life, which could be the driver for their concern about privacy using those technologies.

From a workplace perspective, Gen Z does have the least concern about protecting their privacy at work, but they are in the general range of the other generations, particularly Millennials. Where 34% of Gen Z is concerned about online privacy and security at work, 35% of Millennials, 38% of Gen X and 37% of Boomers share this concern. It will be interesting to see how this view about privacy at work changes as more members of Gen Z enter the workforce and move from entry-level jobs into roles with more responsibility.

Our Take: Gen Z's concern about online privacy is well founded and based in its realistic view of the world we live in, but it's also balanced with the generation's innate tendency to try to incorporate new technologies. As Gen Z continues to enter the workforce and adulthood, this balance of caution and willingness to use new technology will provide a perfect landscape for new technologies and ingenuity that play to both priorities. After all, those most concerned about safety often invent the best safeguards and those with a curiosity and natural fascination toward something often create the most interesting ideas. What better combination than digital natives with a sober grasp of the reality of the risks?



WHAT GEN Z THINKS ABOUT ONLINE PRIVACY

Findings:

- Gen Z differs from other generations in their views about online privacy.
- Gen Z is more concerned than other generations about online privacy in a number of areas, such as paying with debit or credit cards and online dating.
- However, Gen Z is significantly less concerned about their privacy when using technologies native to them, such as mobile payment apps and social media.

Impact:

- Online privacy means something different to each generation and companies will need to adapt accordingly.
- Gen Z's view about online privacy in the key areas of mobile payment apps and social media creates opportunities for continued growth with this new generation, as they trust these channels more than other generations do.
- Gen Z currently has the least concern about their privacy at work, which may mean that they need the most education on the steps they are required to take to maintain privacy while on the job.

Discussion Questions:

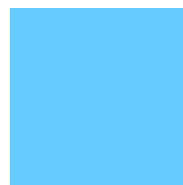
- Do you think that Gen Z is naïve when it comes to their expectation about digital privacy, or do you think they are just more realistic given their natural technology relationship?
- Do you think that companies are doing enough to educate employees about the steps they should take to secure their privacy at work?
- How do you think differing views on digital privacy affect how different generations communicate, shop and work together?

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GEN Z'S VIEWS ON SHARING ECONOMY SERVICES SUCH AS UBER

The sharing economy based on peer-to-peer services, comprised of high-profile companies such as Uber, Lyft and Airbnb, has been a highly touted business breakthrough. This business model that leverages personal time and underused assets, such as your own car or an extra bedroom in your home, took shape and went from an innovative business practice to a normal business practice in the time that Gen Z has come of age.

Another way to think about it: Uber has been pairing drivers and passengers since the oldest members of Gen Z were in middle school. Given that the sharing economy has come of age alongside Gen Z, we asked: What does Gen Z think about this business model that combines on-demand technology, a quick way for people to earn extra money and solving a problem using something one person is paying for that another person needs for a short time?

"Uber, Lyft and other shared service providers are the solution that Gen Z expects. Many members of Gen Z will come of age not remembering a time before they would get in an Uber on the way to a concert, see a friend or come home from a night out."

-Jason Dorsey

When it comes to safety, Gen Z says that their #1 source of trust for sharing economy service providers such as Uber and Lyft are background checks. Sixty-three percent of Gen Z cites this as one of the top three most important things and 28% cite it as the most important. This is more than any other generation and gets a higher score than any other trust factor, including online ratings and reviews. This would lead one to believe that, for companies to attract and keep the business of this new generation, their people need to complete background checks, and this should be heavily advertised.



GEN Z'S VIEWS ON SHARING ECONOMY SERVICES SUCH AS UBER

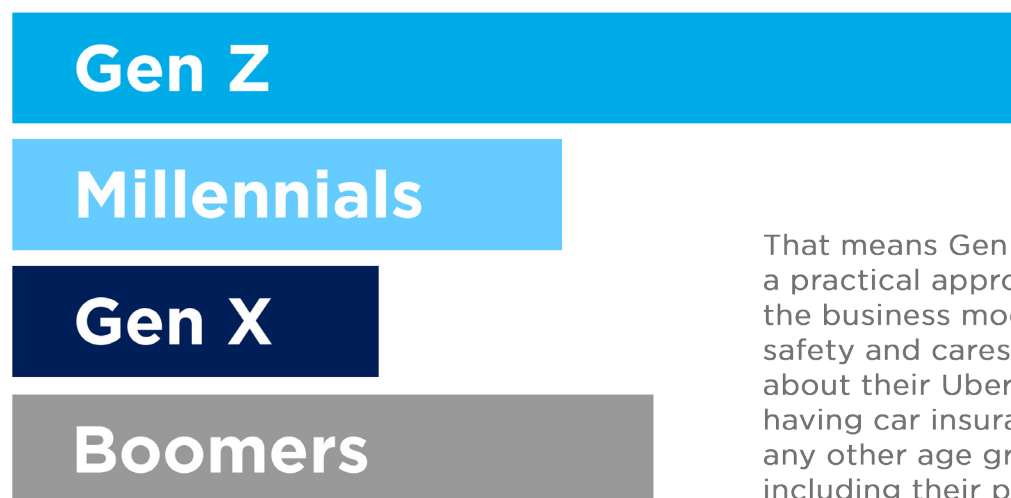
Gen Z also reported caring more about a service carrying insurance than any other generation. In fact, 11% of Gen Z, nearly twice as much as any other generation, reports that a company having insurance for users, such as insurance being provided to cover passengers in an Uber ride, as the top reason that makes them trust a service provider. This is a somewhat shocking finding when you consider that, in the context of age, 14 to 19 year olds—today's teenagers—care more about their Uber driver having the right car insurance in case they get into a car accident than any other age group, including their parents!

Another big generational gap between youngest and oldest: 25% of Baby Boomers don't trust shared service providers at all, more than any other generation.

The net result is that Gen Z has come of age always being able to access the sharing economy for transportation, housing and more, but they also have a more practical approach about it. The new, young generation, more than any other generation in America, expects their service providers to have background checks and carry the right liability insurance.

Our Take: Similar to Gen Z's balance of privacy concerns and love of new technology, we believe that the generation's comfort with shared economy services and expectations for security will lead to the best possible outcome for this industry and the services within.

Gen Z is nearly twice as likely as any other generation to list liability insurance and background checks as the #1 way to earn their trust.



That means Gen Z takes a practical approach to the business model and safety and cares more about their Uber driver having car insurance than any other age group, including their parents!

GEN Z'S VIEWS ON SHARING ECONOMY SERVICES SUCH AS UBER

Findings:

- Gen Z has always known share-economy services, such as Uber and Airbnb, to be a standard type of business service.
- Gen Z looks for background checks as the main source of their trust in these services, more so than any other generation.
- Gen Z, more than any other generation, expects their shared service providers to carry liability insurance to be trustworthy.

Impact:

- Shared services are a core business model that Gen Z counts on to solve their challenges, from transportation to temporary housing.
- Shared service providers must do background checks if they are to earn the trust of Gen Z as consumers.
- Carrying insurance should be advertised by shared service providers as an effective way to increase trust with Gen Z as customers.

Discussion Questions:

- If you always remember being able to use Uber or rent a house through Airbnb, how might that change your transportation or travel patterns?
- Which of these shared services have you used and which have you not used: Uber, Lyft, Airbnb and HomeAway?
- Do you think it's a good or bad thing that the shared service economy is growing so quickly? Why?

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CONCLUSION: WHAT WE SEE SO FAR WITH GEN Z

Gen Z is a more complex, thoughtful generation than many would assume given their age: 20 and younger. This generation after Millennials is soon to become the fastest-growing generation in the workforce, marketplace and adult society. They already are the super-majority in our traditional higher education system.

“The generation after Millennials is very different from Millennials. In fact, they think Millennials are old! This new generation, Gen Z, is poised to change everything and will be the driver of growth for the coming decades.”

-Jason Dorsey

The impact of Gen Z is only beginning to be felt, but is seen earliest in how they use technology. This is important for every generation since how Gen Z thinks about and uses technology is a harbinger of how the rest of us will likely, eventually, think about and use technology. We saw this phenomenon of the youngest influencing the oldest as Millennials came of age. We are seeing the same now, as Gen Z thinks differently from other generations about social media, phone usage, online shopping and online privacy.

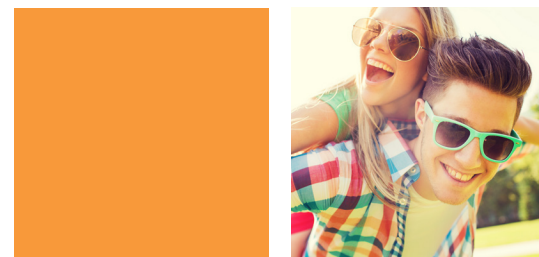
The leaders who identify the challenge that Gen Z brings, along with the opportunity within that challenge, will be positioned to understand and unlock the power of an entirely new generation before their competition does. This is truly a once-in-a-generation opportunity.

At The Center for Generational Kinetics, our passion is uncovering the mindset, behaviors and best practices that solve the challenge and unlock the talent that Gen Z brings as employees, customers and citizens.

We know the challenge that the generation after Millennials brings is only going to increase, but we also believe that the opportunity they drive as employees, customers and citizens will increase as well.



The leaders who identify the challenge that Gen Z brings, along with the opportunity within that challenge, will be positioned to understand and unlock the power of an entirely new generation before their competition does. This is truly a once-in-a-generation opportunity.



CONCLUSION:

WHAT WE SEE SO FAR WITH

GEN Z

Gen Z is about to change the world as we know it. The Center for Generational Kinetics is committed to preparing you to make the most of that change.

This report, Gen Z Tech Disruption, is the first in our landmark series on the generation after Millennials, known as iGen, Gen Z and Centennials.

Visit GenHQ.com/Gen-Z to sign up now for the complete report series and watch the acclaimed TEDx talk, [What Do We Know about the Generation after Millennials?](#)

Contact us today to see how we can help. Thank you for being a bridge between generations.

Sincerely,

Jason Dorsey and
The Center for Generational Kinetics
GenHQ.com
+1 (512) 259-6877



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ABOUT THE CENTER FOR GENERATIONAL KINETICS

The Center for Generational Kinetics is the #1 expert and research firm on Gen Z and Millennials.

The Center's team of PhD researchers, strategists and acclaimed speakers enable companies and leaders to solve tough generational challenges quickly.

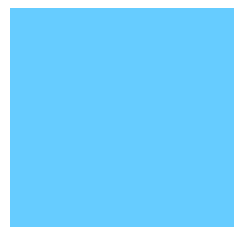
The Center is known for leading research and designing solutions that drive measurable results for clients.

With over 150 research, speaking and solutions clients per year around the world, from car manufacturers and hoteliers to insurance, healthcare and technology pioneers, The Center leads how influencers think about generations.

A trusted source for the media, The Center's team has been featured in hundreds of media interviews from 60 Minutes to The New York Times.

Contact The Center for Generational Kinetics today to learn how we can be a resource to you.

Reach us at GenHQ.com.



ABOUT THE LANDMARK GEN Z SERIES

Millennials caused quite a stir as they came of age, but that will likely pale in comparison to the change that Gen Z brings upon the world. This landmark study series was designed to ask the tough questions and find the actionable insights that leaders in all walks of life need to make informed decisions. Getting these decisions right will become increasingly important as Gen Z moves further into adulthood and becomes the fastest growing generation of consumers, employees and your neighbors.

At The Center for Generational Kinetics, we knew that statistically valid, national data was woefully missing from the conversation about the generation after Millennials. Lots of people have opinions, but virtually none of them had any real research. This national study series is designed to fill in the gaps and open new conversations about the exciting, diverse, thoughtful generation after Millennials and how they will impact our world—and how we will impact them.

Stay tuned for the next report in the series... there is much more to come!



NATIONAL STUDY METHODOLOGY

This research study was designed and led by The Center for Generational Kinetics. The survey was administered to 1,000 U.S. respondents age 14-69, with an additional 250 oversample of ages 14-17. The sample was weighted to the current census data, and participants were screened for U.S. citizenship.

The survey was conducted online from October 15, 2015 to October 21, 2015 and has a confidence interval of +/-3.1%.

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