Ipsos MORI

IPSOS THINKS

BEYOND BINARY

The lives and choices of Generation Z


IN 25 EU COUNTRIES,
THE NUMBER OF YOUNG
PEOPLE DETAINED BY THE
POLICE DROPPED BY 42%
BETWEEN 2008 AND 2014

IPSOS THINKS

BEYOND BINARY

The lives and choices of Generation Z

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INTRODUCING GEN Z ...

Millennials are old news. Gen Z are the new focus of attention, and often wild speculation. Most of them are still very young, with the oldest only just reaching their early 20s, but they are already the subject of spurious claims and myths about who they are and what they're going to be.

This report, the latest in our Ipsos MORI Thinks series, pulls together existing and new analysis, as well as brand new research on this latest generation, to provide a better understanding of the initial signals on how they will be different to, or the same as, previous generations.

Before we outline the findings and their implications, there are five things we wanted to flag upfront.

1. MOST GENERATIONAL RESEARCH IS BAD

Generational analysis is developing a bad name. And fair enough, because a lot of it is poorly done, aimed more at getting headlines or hits for simplistic interpretations of difference than providing true insight. This is not only annoying, it's a genuine risk: as our recent report Millennial Myths and Realities outlined, these clichéd views can take hold, colouring the perception of a whole cohort and leading to bad decisions.

The truth is there are seldom big swings between generations. Instead we tend to see more gradual change, driven by some real differences in context. This is, in fact, a very good test of claimed generational differences: ask yourself 'why?'. What could have driven this shift? If it can't be traced back to big, measurable changes in the environment, be cautious: whole cohorts of people do not magically transform.

2. GENERATIONAL FACTORS ARE OFTEN NOT THE MOST IMPORTANT DRIVERS OF DIFFERENCE

We still love generational research – not as an academic exercise, but because we believe it provides a great way to understand the future. If you can separate 'period effects' (where everyone changes in a similar way at the same time, because of a societal shift or event), 'life cycle effects' (where our attitudes and behaviours change as we age) and 'cohort effects' (where a generation has different views and behaviours from others, and they take those with them as they age), you can start to predict what will happen.

THREE EFFECTS ON A POPULATION'S ATTITUDES AND BEHAVIOUR OVER TIME

Cohort effect	Period effect	Life cycle effect
A cohort has different views and these stay different over time	Attitudes of all cohorts change in a similar way over the same time period	People's attitudes change as they age – attitudes are shifted by life stages or events

But that does not mean that we try to explain everything as a generational factor – quite the opposite. As you'll see throughout this report, lives are becoming more stretched and varied within a cohort group, and often it's other things (like country, income, education) that are more important in explaining differences. Ironically for us, given our generational obsession, we're the first to recognise that it's ever more important to recognise the limitations of cohort explanations.

3. THERE IS NOT MUCH DATA ON GEN Z YET – AND THE GENERATION AND CONTEXT IS CHANGING QUICKLY

We're taking a relaxed attitude to the age groups we look at in this report, partly because there just isn't enough data to be precious about it. Officially, our definition of Gen Z is anyone born from 1996 (currently aged up to 22), but as you'll see, we often focus on certain age groups – particularly teenagers and young adults – as this is where there is most data. We haven't looked at young children below secondary/senior school age very much, as clearly they still have a lot of growing up to do – and researchers who focus on children will tell you how little sense it makes to ask them about adult concepts.

More than that, so many of the drivers of change for this cohort – the first truly fast-internet enabled generation, from their earliest memories – are technological, and this never stands still. It's therefore difficult to look at trends to see what is actually different, so we've had to make do with snapshot data in some places. But we think this pragmatic approach to the data is the right one, because we're trying to get an overall sense of change. Some (good) evidence is better than none, and we've brought together in one place more than we've seen anywhere else.

4. OUR THEME IS 'BEYOND BINARY' – BUT THAT'S ABOUT MUCH MORE THAN GENDER OR SEXUALITY

One of the recurring themes we've seen in bad generational research is a tendency to segment everything into boxes – this idea that the next cohort will be either this thing or that thing, never a mix or somewhere in between. But it just isn't as black and white as that. A good reading of the evidence takes into account the nuance and variation between cohorts, and this is what we hope to bring out. Each section tests out oppositions to highlight the tensions within this one generation.

However, the 'Beyond Binary' theme goes beyond that, applying to an emergent theme of flexibility in society. The stretching out of options and choices, partly fostered by technology, means the wide variety of possible lifestyles, attitudes and behaviours have led to a breakdown in homogeneity. This does include sexuality, but it extends to other areas of life, and this fluidity is something that government and brands will have to understand. The 'types' of people you need to look at have extended massively.

5. WE DON'T EVEN KNOW WHAT TO CALL THIS GENERATION YET

Generational definition and naming is an interesting thing in its own right. There are obviously no hard boundaries around generations, and the ends of each birth range will blur into each other. But this doesn't reduce their value – we use similarly arbitrary age, social class and geographical boundaries all the time. Some generations have clear demographic drivers (Baby Boomers), others draw on cultural references (Gen X), others are based on a point in time (Millennials). Some make more sense in some countries than others (there wasn't really a Baby Boom in some, for example), although we'd argue that the inter-connection born from technological developments, means that some of the drivers of similarity are growing across countries.

We're using Generation Z as our title for now, because it is currently the most recognised term ('what do you have on Gen Z?' is a common question from clients and journalists). But neither the boundaries around this generation, or their name, is set yet: we're with the Pew Research Center on that – it's just a bit too soon. Equally that doesn't mean we can't say something useful about emerging differences and similarities, as we hope this report shows.

IN SUMMARY

Looking across the findings – on everything from health, risk-taking behaviour, social action, technology use, attitudes to privacy, political views, optimism for the future, trust in institutions and people, social attitudes, sexuality and many other subjects – we think there are seven main themes to pull out:

1. Increasingly fluid: as the title of the report suggests, this generation is less boxed in. Please don't think we're making the clichéd point that 'anyone can be anything' which you sometimes see taken from a generalisation of unrepresentative Twitter feeds, or meeting one young person who thinks that way. What we mean is that things are more open, less set, because people do have more ways to connect, see and experience more things.

This doesn't deny the threats of a more ideological and tribal political context: technology has also fragmented people into their own bubbles and echo chambers. But, even in politics, the clear pattern is that each successive generation is significantly less wedded to one political party. Gen Z look similar to Millennials on this: they'll shift if you go wrong (or new options pop up, as in France or Italy). It's the same with brands: trying to target one group to the exclusion of others, implicitly telling people they can only be one thing or the other, would be a serious mistake.

2. No turning point on trust: do not believe the latest polls or headlines that scream about a new 'crisis of trust' in our institutions, particularly not when they say it's because of young people. Our new analysis shows no real differences in levels of trust among the young with regards to all sorts of traditional institutions. It's true, Millennials did mark a low point in trust in others (we're not sure why – maybe a sense of betrayed promises of progress), but now they are ageing, the differences are decreasing and Gen Z start adult life with much higher levels of trust.

This does not mean that institutions and established brands have no challenges with the young, it's just that declining trust is not the source. Frankly it is a cop-out, implicitly blaming consumers and citizens rather than encouraging brands and institutions to look at themselves. The issues are much more about efficacy, relevance and leadership.

3. Just as caring: technology has been democratising in many ways, including in making age, seniority or established connections a lot less important to whether you can have an impact or not. There are so many examples of young people starting movements that change things or bring pressure on those in power, in a way that would have been much more difficult in the past (without denying the importance of student-led movements since the 1960s).

But this does not mean that Gen Z are a cohort of activists. Neither are they selfish snowflakes, too busy watching YouTube videos of people eating Tide Pods. The evidence suggests they are just as active in social causes as previous generations, sometimes in different ways (using technology), but just as often in traditional ways, such as volunteering.

4. Inflection point on health: the obesity epidemic may not be the constantly and inevitably escalating trend it's sometimes made out to be, as it appears to stabilising among children in some countries. That doesn't mean we're not in dangerous waters – it's not getting better either. A lot of this is arguably to do with the environment around young people which is shaped to make it harder to keep a healthy weight – the people they see, the shops they shop at, the food they have available, all create a social norm, and are often geared to make them fat.

IN SOME WAYS, GEN Z ALREADY HAVE AN INNATE ADVANTAGE OVER OTHER GENERATIONS, JUST THROUGH GROWING UP FULLY INTEGRATED WITH TECHNOLOGY – THEY ARE MUCH MORE DISCERNING OF ONLINE SOURCES THAN MILLENNIAL CHILDREN EVER WERE

But this is actually where there is hope on the horizon. Justified concerns about the health impacts of obesity are creating a wave of effective and innovative interventions. Gen Z have the prospect of more access to technologies, social media, and harder and more collaborative government interventions to help keep them a healthy weight. On top of this, they're less likely to be getting involved in typically unhealthy behaviours – particularly smoking and drinking – which shows that some of the earlier interventions around this have really worked

5. Importance of digital skills: digital literacy is obviously going to become one of the most crucial skills to have in the next ten to 20 years. In some ways, Generation Z already have an innate advantage over other generations, just through growing up fully integrated with technology – they are much more discerning of online sources than Millennial children ever were.

But this should not make us complacent about the risks: near universal access to the internet in established markets hides the very real differences in uses and skills development between

GENERATIONAL DECLINES IN YOUTH CRIME, SMOKING, DRINKING AND SEXUAL ACTIVITY REFLECT A SIGNIFICANT BEHAVIOURAL SHIFT

different socio-economic groups within Gen Z. So working digital literacy and technological skills into both formal and informal education will become more vital, not less. This is not just to ensure all children are on a level playing field when it comes to taking full advantage of technology, but also to ensure that the adult Generation Z have tools to change jobs and upskill as technology transforms the labour market.

6. Danger is different: Generation Z are not the teenage rebels of ages past. Generational declines in youth crime, smoking, drinking and sexual activity reflect a significant behavioural shift. This has so many great implications. They're less at risk of all the negative mental, social and physical impacts of early exposure to sex, drugs and rock and roll (okay, not rock and roll).

But society cannot rest on its laurels. This shift has not come from young people understanding and acknowledging the risks of these behaviours – it's more likely to do with them being stopped by more general societal changes and interventions, as well as a shift towards online activities.

7. And digital is double edged: this deep integration of digital communications into the lives of young people brings wider benefits in connection, social action, and self-expression – but also its own risks.

There is a growing body of evidence of the downsides from unfettered use of technology, prompting more strident statements from politicians and officials, including the head of the NHS in the UK. Social media use has correlations with anxiety, bullying, peer pressure, lower self-esteem, alongside much more positive outcomes. We're only in the infancy of understanding the full impact of this entirely different technological context on the first truly digitally native generation. But this does not mean we are powerless in mitigating the negative and emphasising the positive aspects of young people's lives – far from it. The calls for intervention from campaigners and legislators is likely to grow – but, given how rapidly technology is developing, a long-term shift is much more likely through a collaborative approach, that uses the huge expertise of technology companies.

If you would like a presentation or seminar on the implications of Gen Z for your organisation, please get in touch.

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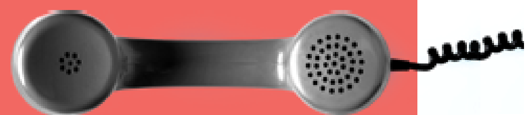
GEN Z: THE FACTS

66% of Generation Z think of themselves as exclusively heterosexual compared with 71% of Millennials, 85% of Gen X and 88% of Baby Boomers

Only, **39%** of teens prefer to buy gender-specific shoes, compared with 57% of Millennials

In 2002, half of 11-15 year olds talked to their mums about things that mattered, by 2015, 65% of children reported doing this at least once a week



In 25 EU countries, the number of young people detained by the police dropped by 42% between 2008 and 2014

In 2016, **36%** of 13-15 year olds had experienced alcohol compared with 72% in 2000

The average intake of free sugars among English children aged 11-18 years in 2016 is significantly lower compared with 2010

GEN Z: THE FACTS

In 2017, **6/10** of Generation Z, said they trusted the person in the street to tell the truth in 2017, up from 36% among Millennials when they were the same age

In England **36%** are overweight or obese, almost exactly the same as Millennials in 2003. Obesity levels in the US are still increasing gradually, with 30% obese or overweight, compared with 25% in 1999. [Bearing in mind UK and US data are not comparable]

In **2003** optimists for the future of the young outnumbered pessimists by nearly four-to-one in Britain. Now there are more pessimists than optimists

15% of Gen Z teens would contact their MP, compared with a quarter of Millennials in 2005

In the US in 2015, **22%** of high schoolers had been in a physical fight that year compared with 36% in 1999.

GEN Z: THE FACTS

There was an 11 percentage point drop in daily consumption of soft-drinks in adolescents between 2002 and 2015 (from 29% to 18%) across 32 European countries

40%

of 12-15 year olds in 2010, felt that things they saw on social media were either entirely or mostly true; just 24% of Gen Z 12-15 year olds think that now

A quarter of British teenagers say they have avoided certain products because of the conditions under which they were produced or what they are made from, up from 19% of Millennials at the same age

60%

of 16-22 year olds say they feel pressure to make money and be successful, compared with only a third of Baby Boomers

Saturday jobs are dying off. In 1997, 42% of 16-17 year old students were studying and working at the same time, compared with just 18% of 16-17 year olds in 2014

Just 30% of teenagers feel the things they own say a lot about how well they are doing in life, compared with 42% in 2011

PROGRESSIVE / TRADITIONAL

IN BRIEF

GEN Z AND SOCIAL ATTITUDES

- The shift towards a greater acceptance of varied lifestyles and identities across most generations in the west means Generation Z are not actually that much more progressive on issues that were once the cornerstone of the liberal agenda – gay rights and gender equality.

- In countries like the UK, where tolerance towards same-sex relationships has become the norm, Generation Z are no more likely than Millennials, Generation X or Baby Boomers to think there is nothing wrong with same-sex relationships (around seven in ten of each of these generations think this).

- But that's not the case in every country. In the US, where acceptance of homosexuality is less widespread, younger generations stand out as being much more liberal. Millennials, and now Generation Z, are much more tolerant – around seven in ten of Generation Z and Millennials (72% and 69% respectively) have no problem with homosexual relationships, compared with just 43% of Baby Boomers.

- There's evidence this more liberal context has given Gen Z a greater freedom to have a less binary view of sexuality. Although likely to also be an impact of age, just two thirds (66%) of Gen Z think of themselves as exclusively heterosexual, compared with 71% of Millennials, 85% of Gen X and 88% of Baby Boomers.

- Similarly, more traditional views of gender roles (men going to work, women staying at home) are no longer the norm in many countries. But the norms of younger people (at least in the US) are also more gender-neutral – well over half (56%) know someone who uses non-gender-binary terms.
- This impacts on what they're willing to buy: Generation Z are less likely to want gendered clothes, shoes, sports goods, perfume and deodorant.
- At the same time, there are some aspects of Gen Z which hark back to the 1940s – many more are staying at home with their parents past the age of 18, and families are closer. The proportion of children aged 11-15 talking to their parents about something that matters to them each week has increased by 14 percentage points between 2002 and 2015.

THE IMPLICATIONS AND THE FUTURE

Keeping ahead of change: what was progressive is now normal, what is now progressive will be normal

Since many in Generation Z were born, the societies they live in have shifted towards social liberalism, from whatever baseline they started from. Equality and anti-discrimination laws continue to progress, and although the level of inclusion of these laws varies greatly from region to region, what were once markers of socially liberal attitudes (acceptability of same-sex relationships, less restrictive gender roles) are simply the norm in many countries now.

This isn't to say that feminism and gay rights aren't and won't be in the spotlight for Generation Z. However, the issues continue to move forward, expanding in their remit and encompassing other issues, such as gender fluidity and trans rights. Social norms are changing for Gen Z, and arguably at a quicker pace

> SOCIAL NORMS ARE CHANGING FOR GEN Z, AND ARGUABLY AT A QUICKER PACE DUE TO THE GLOBAL CONVERSATIONS ENABLED BY TECHNOLOGY

due to the global conversations enabled by technology. In this market, it will be imperative for brands to react and adapt or be left behind. A good example of successfully taking on feedback is in the fashion industry. After model Talulah-Eve penned an open letter questioning why she was the only transgender model to walk the catwalk at London Fashion Week, a record 28 transgender models appeared at New York Fashion Week 2018.[1]

Guys and dolls: gender neutral marketing

Another social norm of the future is likely to be gender neutrality. Generation Z's attitudes to equality and neutrality reflect the nature of social change and, in turn, are being reflected in culture. Already we are seeing more shows with gender fluid characters, such as children's series Julie's Greenroom which debuted on Netflix in 2017.[2]

For brands targeting Gen Z, these trends should not be taken lightly, particularly as Generation Z seem to be less interested in buying gendered products. Brands of the future must adapt their marketing to the changing values of their audience, and for many this will mean moving away from gender-specific products and communications. This will be a change they can lead, or be forced to follow. For example, H&M is one of the first mainstream brands in the UK to launch a unisex adult clothing line.[3] While in 2017 UK shoe outlet Clarks was forced to drop a girls' shoe design called 'Dolly Babe', and the boys' equivalent called 'Leader', with Scotland's first minister even joining the debate calling the situation unacceptable.

Feminist branding

The feminist movement has seen an enormous revival in recent years and people all over the western world are holding politicians, celebrities and brands to account on where they stand on gender equality and rights. But its character is very different to what older generations, such as Baby Boomers, might have known. It's now global, thanks to the internet. Conversations are no longer restricted within nations, but shared. Hashtags such as #everydaysexism, #heforshe and more recently #timesup and #metoo have gained huge amounts of traction. Social media is providing not only a platform to call out gender imbalances, but a space for young women to share and support.

The modern feminist movement is more holistic – no longer just focusing on specific issues like gender roles and pay gaps, but encompassing identity and the core concept of equality. It is no longer a 'women's issue'. Practical changes such as the doubling of stay at home dads in the US since 1989[4] and the relatively recent introduction of shared parental leave in the UK should not be ignored. By the time Gen Z are starting families, men could be carving out more instrumental roles in the home and women will have more opportunities to return to the workplace on an equal footing.

This resurgence has not gone unnoticed by brands. American underwear brand Aerie launched their 'Real' campaign hoping to tap into the positive body image movement by claiming to use un-photoshopped images which "challenged supermodel standards". After years of criticism from the feminist movement, Barbie has released a series of 'Shero' dolls made in honour of outspoken women, featuring Frida Kahlo and American plus-size model Ashley Graham.[5] Adapting to the changing landscape will be absolutely key – the space to respectfully participate in the growing conversation about feminism is growing.

SEVEN IN TEN (73%) OF 15-16 YEAR OLDS FROM OUR YOUNG PERSONS OMNIBUS THINK SAME-SEX RELATIONSHIPS ARE NOT WRONG AT ALL

THE CURRENT EVIDENCE

Green-lighting the rainbow

In the time Generation Z have been growing up, there has been a continuation of social shifts, with greater acceptance of varied lifestyles and identities. One of the areas that has seen most change is the growing acceptance of same-sex relationships, particularly in the western world. When the first of Generation Z were born in 1995, only 22% of British adults believed that same-sex relationships were "not wrong at all".[6] Fast forward twenty years and that figure has reached two-thirds of the population (64%).

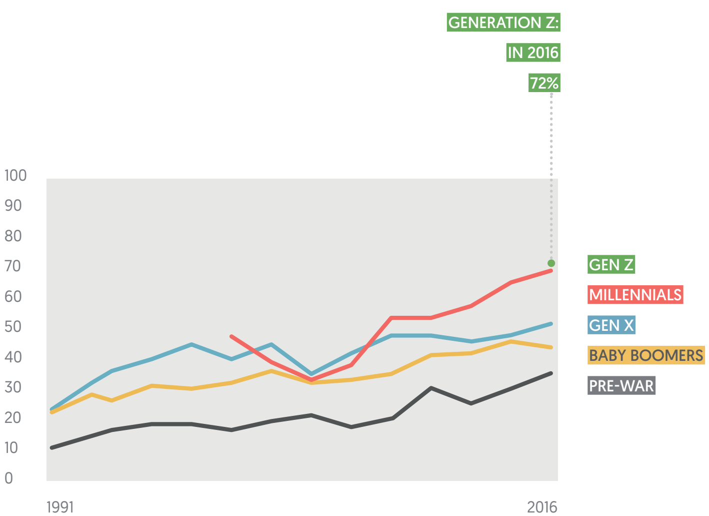
There is no doubt that this liberalisation is a combination of cohort and period effect, but the interaction of these factors differs globally. In Britain, this shift is predominantly cultural, with all generations becoming more accepting of same-sex relationships since the early 1990s. It's only the Pre-War generation which stands out generationally – just 41% of those born in the 1940s say same-sex relationships are "not wrong at all".[7]

This is not surprising due to the number of important milestones passed over the last twenty years that have encouraged a growing tolerance of the LGBTQ+ community, across the whole of Britain. Not just the obvious legal stamp of acceptance of same-sex relationships through civil partnerships (2004), followed by the legalisation of same-sex marriage (2013). But, also milestones like the Equality Act (Sexual Orientations) Regulations in 2007 – banning any type of discrimination on the grounds of sexual orientation, and the granting of equal rights to same-sex couples applying for adoption in 2002.

British Generation Z attitudes are looking as if they are similar to older age groups, not more accepting. Seven in ten (73%) of 15-16 year olds from our Young Persons Omnibus think same-sex relationships are not wrong at all, compared with seven in ten (73%) of Millennials born in the 1980s.[8] There's nothing particularly more progressive about younger generations in societies where issues, like same-sex relationships, have plateaued into general acceptance. Yet in the US, overall tolerance of homosexuality, and its generational pattern, is very different. The same general trend of greater acceptance over the past 20 years can be observed, but

MILLENNIALS AND GEN Z ARE MORE TOLERANT OF SAME-SEX RELATIONSHIPS THAN OLDER COHORTS – US

% think sexual relationships between two adults of the same-sex not wrong at all



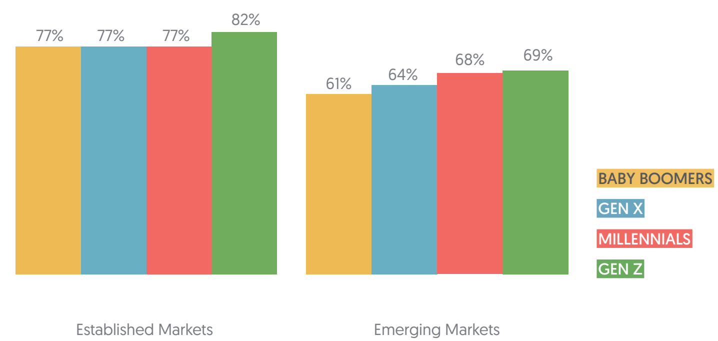
Source
Ipsos MORI analysis of General Social Survey

only half (50%) of Americans think same-sex relationships are not wrong at all. And younger generations stand out as being much more liberal: Millennials, and now Generation Z, are hiking up the country's average (72% of Generation Z and 69% of Millennials).

Globally, the difference in national context creates massive variation in tolerance within Generation Z. The latest wave of the Ipsos Global Trends Survey highlights differences between young people's attitudes in emerging and established markets. In this study, participants were asked whether or not they agreed that "gay men and lesbians should be free to live their own life as they wish".

ACCEPTANCE OF SAME-SEX RELATIONSHIPS IS MUCH HIGHER ACROSS ALL GENERATIONS IN ESTABLISHED MARKETS

% agree "gay men and lesbians should be free to live their own life as they wish"



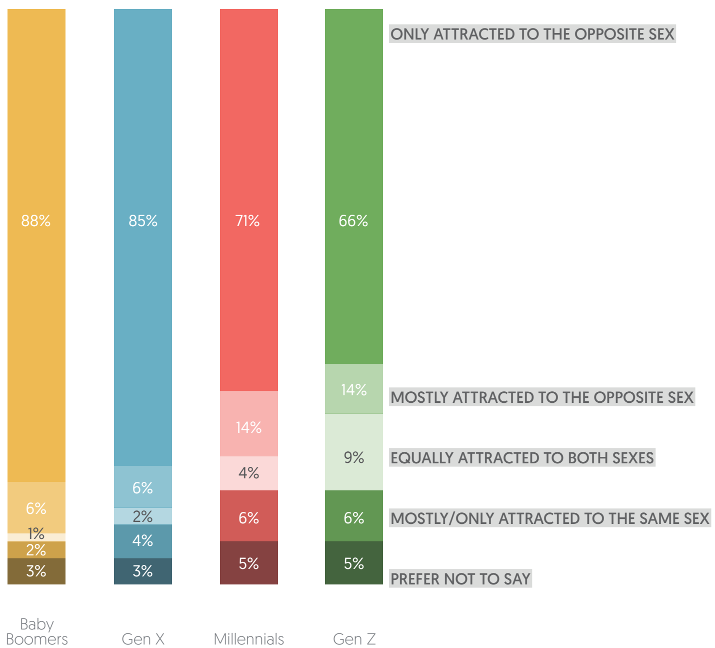
Source
Ipsos Global Trends Survey

Base
17,180 adults aged 16+ in 22 countries, online, 12 Sep - 11 Oct 2016

Across established economies, there's no real difference between age groups – just over three quarters (77%) of Millennials, Generation X and Baby Boomers are in favour of this sentiment, with Generation Z only slightly more in favour (82%). In emerging markets, younger generations are slightly more tolerant than older age groups (69% of Generation Z are in

ONLY TWO THIRDS OF OLDER GENERATION Z IDENTIFY AS EXCLUSIVELY HETEROSEXUAL

% agree the following best describes sexual orientation



Source
Ipsos Connect for BBC Newsbeat 2017

Base
c. 3000 aged 15+
Aug-Sep 2017

favour compared to 61% of Baby Boomers). But, compared with people in the same age group in established markets, Generation Z in emerging markets are 13 percentage points behind.

New issues for Generation Z?

There is some indication that growing up in a more accepting society has had an impact on how young people view sexuality more generally. For example, among British school children, three in five (60%) of 15-16 year olds think sexuality is a scale and that it is possible to be somewhere in the middle.

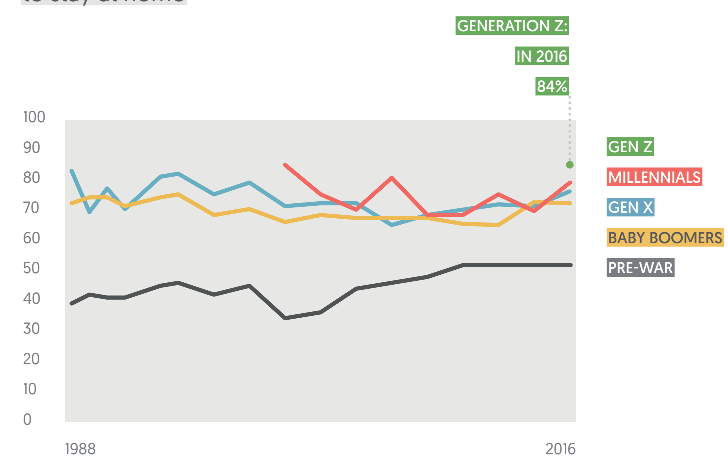
Self-identification among older UK Generation Z (16-22) seems to follow a similar pattern: just two thirds (66%) think of themselves as exclusively attracted to the opposite sex, compared with 71% of Millennials, 85% of Gen X and 88% of Baby Boomers. It's difficult to say how much this is a factor of age without any trend data. And certainly this fluidity is likely to be due, in part at least, to being at an earlier stage of identity development. Yet, the strength of the change in the wider societal context makes it likely that it has had some impact on a cohort of young people with more scope to explore.

Gender-ational change

Greater acceptance of homosexuality is not the only traditional 'liberal' view that is becoming a societal norm in many different cultures. Long-term trends on gender roles show real changes during the time Generation Z have been growing up. Women continue to contribute more to the workplace and fathers are having greater responsibilities at home – aided by laws such as the right to parental leave. The gender pay gap has gradually

RIGID GENDER ROLES NO LONGER THE SOCIAL NORM FOR ALL GENERATIONS – US

% disagree it is better for a man to work and a woman to stay at home



Source
Ipsos MORI analysis of General Social Survey

decreased in the UK – the gap (in median earnings) for full-time employees decreased from 17.4% in 1997 to 9.1% in April 2017.[9] This gap is still significant, but reflects the changing role of women in the workplace during the lives of this generation.

Again, it is no surprise, therefore, that very traditional views of gender roles – that men should go to work, while women should tend to the home – are no longer the social norm. In the US, all generations younger than the Pre-War generation are far more likely to disagree with this sentiment than agree – 84% of Generation Z disagree with traditional gender roles, as do 79% of Millennials and 78% of Generation X.

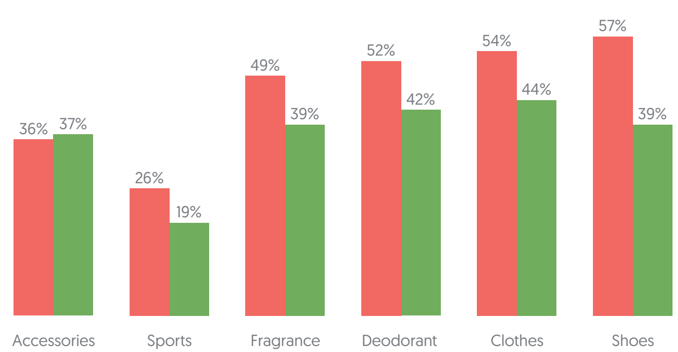
There is, however, evidence that this shift in environment is impacting young people. Similar to their opinions on sexuality, Generation Z seem to see a spectrum of gender identities – with evidence that gender neutrality is more of a norm among young people than it was for Millennials. In 2016 in the US, three quarters (74%) of Generation Z (13-20) said they are more accepting of non-traditional gender identities than they were a

GENERATION Z PREFER NON-GENDERED PRODUCTS – US

% agree "I always buy products that are geared specifically toward my own gender, rather than non-gendered products, when it comes to..."

MILLENNIALS (THOSE AGED 21-34)

GENERATION Z (THOSE AGED 13-20)



Source
J. Walter Thompson Intelligence – Study of youth attitudes towards gender

Base
300 US Generation Z (13-20); 300 US Millennials (21-34), 2016

SEVEN IN TEN OF GEN Z THINK IT IS IMPORTANT FOR PUBLIC SPACES TO PROVIDE ACCESS TO GENDER NEUTRAL BATHROOMS

year ago – compared with 64% of younger Millennials (21-27). And well over half (56%) said they knew someone who uses non-gender-binary terms (they/them/ze etc.), compared with 47% of younger Millennials (21-27) and 43% of older Millennials (28-34).

Ignore this at your peril. There is evidence this impacts on how they think the world should be, for example: seven in ten of Gen Z think it is important for public spaces to provide access to gender neutral bathrooms (compared with just 58% of younger Millennials and 56% of older Millennials).[10] But, it also affects where they want to spend their money. Gen Z are much less likely to buy products specifically geared towards their own gender, compared with Millennials. Just two in five (39%) of teens prefer to buy shoes which are gender-specific, compared with nearly three in five (57%) of Millennials.

Closer knit families?

Between 2001 and 2015 the percentage of dependent children in the UK living in a married couple family fell from 68% to 62%, with the number of co-habitating families increasing from 10% to 15% in the same period.[11]

But, while the experience of living with married parents may be declining, many more young people are living with their parents for longer. This is a trend that looks set to continue

SECONDARY SCHOOL-AGE GENERATION Z MORE LIKELY TO TALK TO THEIR PARENTS ABOUT THINGS THAT MATTER – UK

	Talk to mother about things that matter at least once a week	Talk to father about things that matter at least once a week
YOUNGER MILLENNIALS Those aged 11 to 15 in 2002	51%	31%
GENERATION Z Those aged 11 to 15 in 2015	64%	45%

Source British Household Panel Survey 2002 / Understanding Society, the UK Household Longitudinal Survey 2015

for Generation Z. In 1997, 20% of 20-34 year olds were living with their parents, in 2017 this figure had reached 26%.[12]

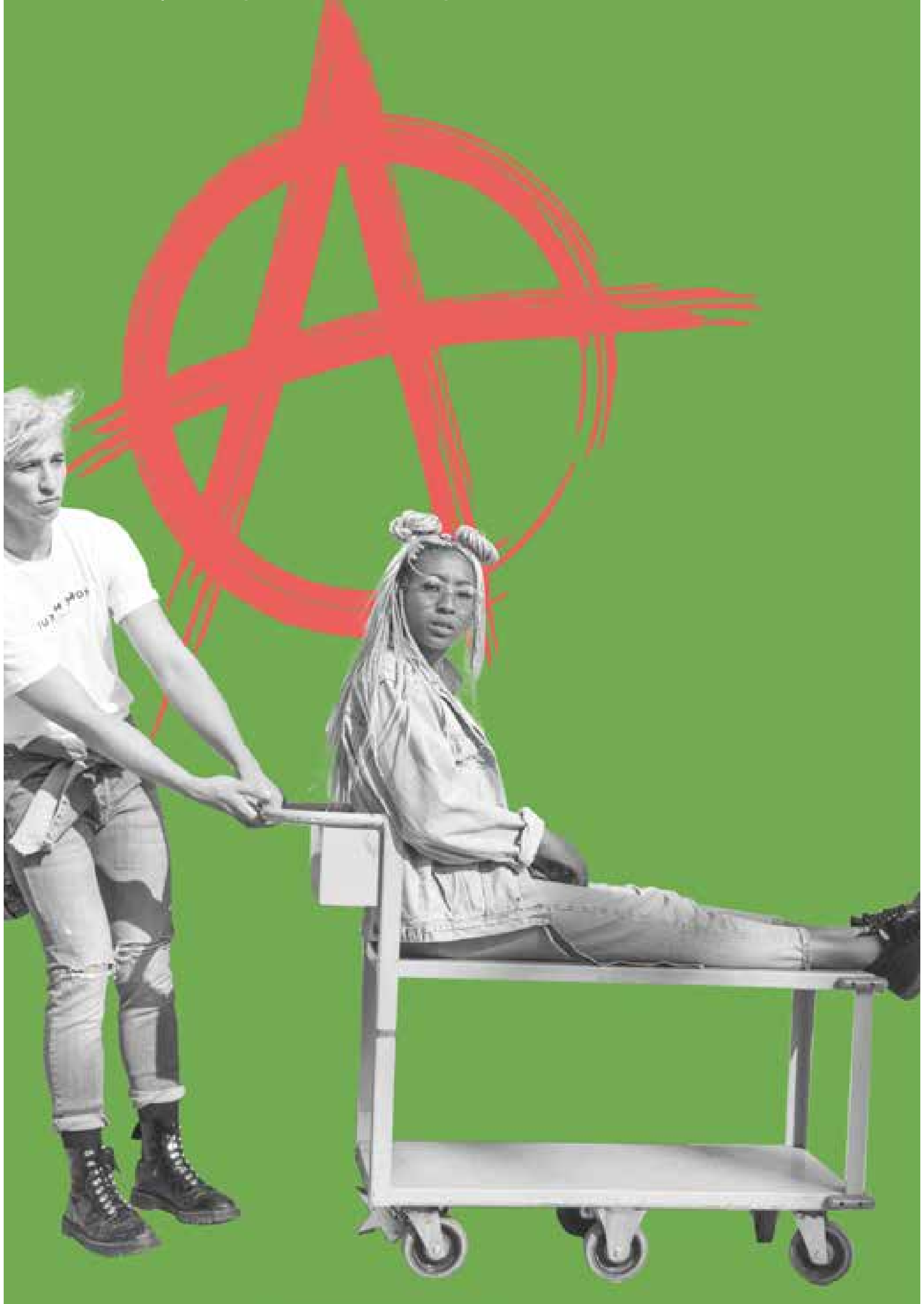
On top of being in closer proximity for longer, they also appear to be closer emotionally than Millennials were. The proportion of children aged 11-15 talking to either parent about something important has increased by 14 percentage points between 2002 and 2015. In 2002, half of 11-15 year olds (part of the Millennial generation) talked to their mums about things that mattered, by 2015, two thirds of children (65%) reported doing this at least once a week. Similarly, around a third of Millennial 11-15 year olds would talk to their dad regularly about things that matter in 2002 (31%), compared with nearly half (45%) of secondary school age Generation Z in 2015.[13]

FINAL THOUGHTS ...

Traditional measures of liberal attitudes no longer reveal anything special about younger generations – particularly in countries where things like acceptance of same-sex relationships and a rejection of traditional gender roles are the norm. This doesn't mean Gen Z are not more liberal in some ways. Arguably, social liberalism has just shifted focus on to different issues (as it always does), encompassing wider views on gender and sexuality. And on these measures, Gen Z seem to be leading the way – they're more likely to embrace sexual fluidity and accept gender neutrality.

These changing norms are important. Gen Z take their preferences seriously – and they're willing to put their money where their mouth is.

Yet despite having different views to their parents' generation on these issues, they are closer to their families than before, both physically and emotionally. This shouldn't be ignored. The influence of parents on young people's lives extends beyond just being reluctant landlords to kids stuck in the nest – they are more likely to be an active part of their lives.



YOUTH GONE WILD / YOUTH GONE MILD

IN BRIEF

GEN Z AND REBELLION

- Recent years have seen a generational decline in a number of behaviours associated with rebellious youth. When compared to Millennials at the same age, Generation Z drink less, engage in fewer sexual activities and commit less crime.

- Drinking culture among teenagers has weakened across Europe and the US. In the UK, Gen Z 13-15 year olds are nearly half as likely to have even tried alcohol as Millennials at that age in 2004.

- In the UK at least, this could be down to a real shift in risk perception among teenagers – more than 70% think binge drinking is very risky and 28% think having any alcoholic drink is very risky.

- However, with the exception of alcohol consumption, this decline does not seem to be due to teenagers changing their risk perception. In fact, they are less likely to think drug use and unprotected sex are risky than the previous generation of young people.

- Generation Z are also less likely to commit crime or get into fights. In Germany, the number of arrests of 12-

16 year olds dropped by 40% between 2006 and 2015. And in the US, physical fights in high schools are far less common than when Millennials were in school in 1999.

- But generational drug taking is more varied from country to country and drug to drug. In the US, a 12-percentage point drop in high schoolers trying marijuana is juxtaposed by very stable trends in the UK.
- And although teenagers in some countries may be engaging in less sexual activity, there's no real change in engaging in unprotected sex.

THE IMPLICATIONS AND THE FUTURE

Are you scared yet?

On the surface – this milder form of youth is very encouraging. Typically bad habits, such as drinking, smoking, taking drugs and engaging in sexual activity, are considered more risky for children and young people (ignoring any legal issues for a second). This is partly because teenagers are at such a crucial developmental stage, but also that habits ingrained from an early age can be harder to shake off in adulthood. With Gen Z less likely to engage in these types of habits, there could be many positive implications for their future health, both mental and physical.

But whether this aversion to risk is permanent is not so clear. There is speculation that decreases in certain types of behaviour could be displacement as a result of increasingly digital lives. Young people get more of their thrills online, and are just too distracted to get up to real-world mischief.

People who study risk, such as University of Cambridge professor David Spiegelhalter, distinguish between hazard, which is the potential for harm, and risk, which is the probability of that adverse outcome actually happening.[14] And, of course, while the hazards are different, the risks of online behaviour are real, and less likely to be monitored. Official crime statistics are only now catching up with cybercrime – and digital antisocial behaviour and the extent of inappropriate sexual activity online are not really measured at all. So Gen Z may be just as badly behaved – but in a different way.

There's also evidence that potentially it is more to do with the increase in number and effectiveness of barriers which pre-empt and prevent bad behaviour. There's no doubt that there have been general shifts in attitudes, behaviours and legal practices among western countries, which mean there has been a general population-wide decline in these behaviours. Measures massively vary across countries, but many have seen changes in policing methods and legal constraints which could have impacted on population-wide behaviours, as well as on young people – for example, changes in methods and preventative actions for youth crime, sanctions for drunken behaviour or for possessing and dealing drugs. Declines in these behaviours among young people are also linked to alterations in schooling methods – particularly among Scandinavian countries.

IN MODERATION

Seedlip, the world's first non-alcoholic distilled spirit, was developed by tee-totaller Ben Branson who was sick of only ever ordering tonic water in bars.

Made by soaking herbs and botanicals in neutral grain spirit and distilling to concentrate the flavours, the final product was developed over two years of tinkering in his kitchen.

By 2015, Seedlip had won a listing in Selfridges followed by Fortnum & Mason and Ocado. Then, in 2016, drinks multinational Diageo took a 20 per cent stake in the company through its investment arm Distill Ventures.

A wise investment. With year-on-year growth of over 1,000%,[15] Seedlip is now stocked in around 400 bars and restaurants in the UK and has made headway in European cities, the US and Australia.

One thing that new data from our study does seem to suggest is that it's not about a sudden growth in fear of these behaviours (alcohol excepted). This is counter to what one might assume, and intriguing – it is not a result of communications getting the message across better, or a general cultural shift towards caution. There does not appear to be a shift in young people's internal risk calculus, which suggests that the changing cultural, technological and legal environment is key. This means that the level of support must be kept up if we want young people of the future to continue this trend.

A future less fuzzy

Drinking alcohol is simply not as widespread among teenagers today, and it's set to become a habit. With just over one in four of 16-24 year olds teetotal – about eight percentage points more than ten years ago – it's likely this cultural shift will change the drinks industry.[16]

The low- and no-alcohol drinks market is booming. Top-quality 'mocktails' feature in an increasing number of bar menus. Fuelled by a tranche of new products, such as Heineken 0.0, Budweiser Prohibition and Guinness Open Gate Pure Brew lager, sales of low- and no-alcohol beer grew by 20.5% in the UK in 2017.[17] Meanwhile in 2016 Diageo, the multinational alcoholic drinks company, made the pivotal decision to invest in the first non-alcoholic distilled 'spirit' Seedlip.

Forward-thinking food and drink manufacturers will follow suit. To tap into this teetotal market they need to think just as much about their non-alcoholic offering as they are about their alcoholic one.

THE CURRENT EVIDENCE

The decline of alcohol

Alcohol consumption across more established markets has faced a relatively consistent pattern of decline over the past 15 to 20 years.[18] People in the US and much of Europe are drinking less alcohol generally, but the freefall in adolescent drinking rates has fuelled a generational shift. Millennials drank less than their older counterparts when they were young – and now Generation Z are drinking even less.

And this international decline is despite the very different contexts, drinking cultures and norms in these countries. For example, the UK has seen one of the sharpest and most surprising shifts in drinking culture. Generation Z teenagers (specifically 13-15 year olds) are half as likely as Millennials at an equivalent point to have even tried alcohol. In 2016, just over a third (36%) of 13-15 year olds had experienced alcohol.[19] Yet in 2000, nearly three quarters (72%) of 13-15 year olds had had at least one proper alcoholic drink.

GENERATION Z TEENS ARE MUCH LESS LIKELY TO HAVE TRIED ALCOHOL – ENGLAND

% 13-15 year olds who tried an alcoholic drink

MILLENNIALS IN 2000
Those aged 13 to 15
72%

GENERATION Z IN 2016
Those aged 13 to 15
36%

Source
Health Survey for England

This is a monumental change in children's first relationship with alcohol and is mirrored, although less dramatically, in the US where 60% of high school students (aged 14-18) had tried an alcoholic drink in 2017 – much lower than the 81% of Millennial high school students in 1999.[20] In Australia, cohort analysis pinpoints a generational drop in both drinking participation and volume among younger Millennials and older Generation Z, compared to older cohorts.[21]

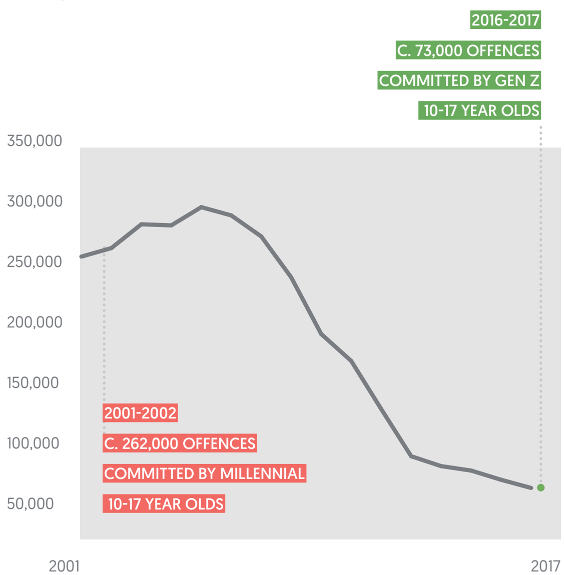
No nose for crime

A strikingly similar pattern of youth crime rates and violence can be seen across different western countries. Recorded youth crime rates have declined in many different countries since Generation Z have hit adolescence.[22] In 25 EU countries, the number of detained young people dropped by 48% in the period between 2008 and 2015.[23] In Germany, for example, the number of arrests of 12-16 year olds dropped by 40% between 2006 and 2015.[24]

In England and Wales over the past decade, the number of recorded crimes committed by 10-17 year olds is three times less.[25] If we look at the long-term trend (in the graph below) the sharp drop in youth offences from the late 2000s into 2010s occurred within the younger members of the Millennial generation and into Generation Z. Then, if we compare

NUMBER OF OFFENCES COMMITTED BY YOUNG PEOPLE MASSIVELY DECREASED COMPARED TO MILLENNIAL YOUTH

Number of proven offences among 10-17 year olds in England and Wales



Source
Youth Justice Board

the cohorts like-for-like, in the year 2001-02, there were approximately 262,000 offences committed by Millennials aged 10-17. By 2016-17, the number of offences committed by 10-17 year olds (Generation Z) had dropped to c.73,000.

As with alcohol consumption, declining crime rates are not occurring among young people in isolation – there are wider patterns of decreasing crime rates in these countries. However, the drop is much starker for young people.

Young people also seem to be behaving less violently. For example, in the US, there has been a drop in the number of teenagers involved in physical fights in school. In 2015 (when Generation Z were up to 19 years old), 23% of high schoolers had been in a physical fight that year (17% of females and 28% of males). Whereas in 1999 (when Millennials were aged up to 19 years old), 36% of high schoolers had been in a physical fight (27% females and 44% males).

Keeping off the grass

However, drug use has seen less of a uniform decline among teens. In some countries there has been a decline, but in others, rates are steadier.

In the US, where a cultural shift on marijuana in particular has led to a number of states legalising cannabis, adult use rates have remained broadly steady. But Generation Z high school students are less likely to try marijuana than Millennial students were. The Youth Risk Behaviour Study among high school students records a 12 percentage point decline between cohorts. In 2015, 39% of Generation Z high schoolers had tried marijuana, compared to 1999, when nearly half (47%) of Millennial teenagers had given it a try.[26]

However in Europe, where measures of cannabis use are lower than those found in the United States, rates of use among teenagers remained stable – even showing a slight increase over the past 20 years among 15 and 16 year olds (5% in 1995 to 8% in 2015).[27]

S-exiled: less sex, more sexting

Sex among teens is difficult to measure – partly because of over and underreporting – but also partly because there are so many different ways to define sexual behaviour. With the data available, it certainly seems that at least some types of sexual activity are on the decline.

In the US, surveys among high schoolers have shown a slight drop in sexual activity between Gen Z and Millennials. Generation Z high schoolers are less likely than Millennial high schoolers to say they have had sex in the three months prior to being surveyed. In 2015, 30% of Generation Z in high school (up to 19 years old) were sexually active (with the caveat we are relying on self-reporting). In 1999, when Millennials were at an equivalent point, 36% of high schoolers were sexually active.

In our 'Millennial Myths' report, we found that Millennials were having sex less often and with fewer people compared to Generation X at a similar age. Research has now shown this generational decline in sexual activity and dating extends into Generation Z.[28]

However, there are some particularly risky types of sexual behaviour that are either just as prevalent or even potentially on the rise among Gen Z teenagers. Unprotected sex in the US is just as prevalent among high schoolers as before.[29] In 2015, 14% of sexually active high schoolers said they had not used protection when they had last had sex – the same proportion of Millennials who were asked the same question in high school in 1999 (15%).

Meanwhile, 'sexting' is a new sexual activity among Generation Z, something that wasn't nearly as available for previous generations of young people. And, although prevalence is difficult to measure, there is evidence that sexting among young people is gaining more traction and can be a predictor of sexual activity, as well as being associated with other risky behaviour.[30]

UNPROTECTED SEX IN THE US IS JUST AS PREVALENT AMONG SEXUALLY ACTIVE HIGH SCHOOLERS AS BEFORE

Risk perception is NOT the driver

Patterns of generational decline in risky behaviours is generally considered widespread enough to not simply be coincidence.[31] So what is it about Generation Z which makes them a milder brand of youth than their predecessors?

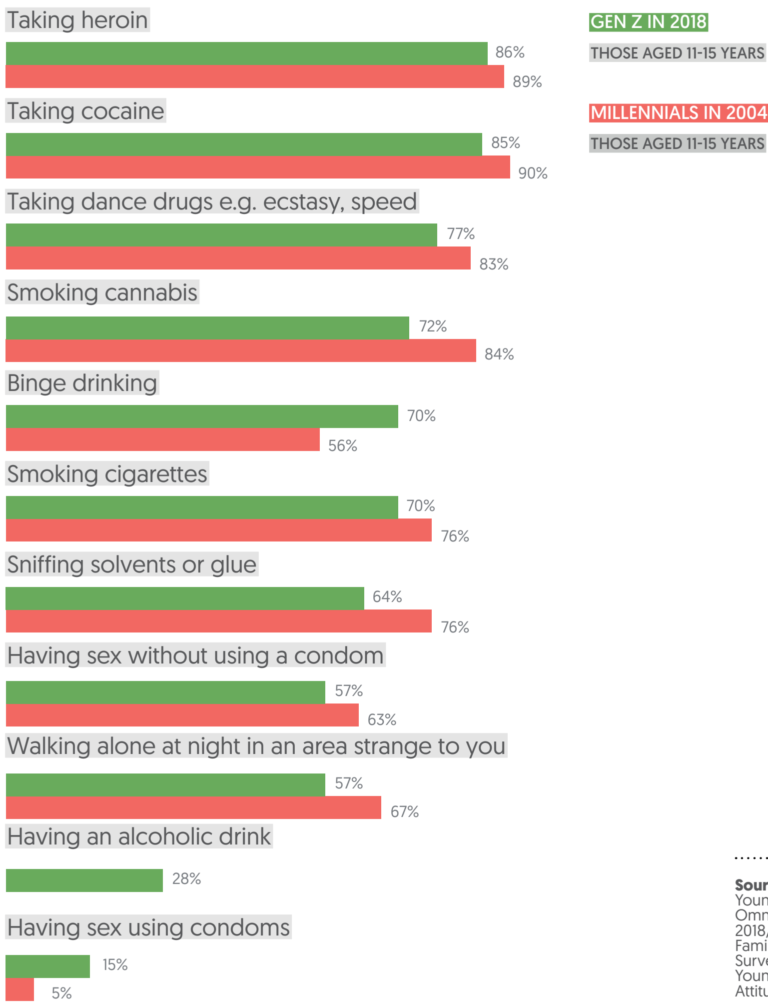
One theory is that 'period effects' (see Introduction) around social attitudes and acceptability of certain behaviours have rubbed off on children growing up in the late '90s and '00s. Parents, teachers, media and wider society waxing lyrical about the dangers of certain types of behaviours has rubbed off on adolescent perception of risk.

However, trend data from UK secondary school children indicates otherwise. Asking 11-15 year olds how risky they consider certain behaviours to be shows Gen Z teenagers today are actually less worried on most measures than Millennials were at an equivalent point in 2004. They're less likely to think various types of drugs are very risky. For example, seven in ten (72%) adolescents think smoking cannabis is very risky, compared to 84% of Millennial teenagers in 2004. They're also less likely to think unprotected sex is risky (57% compared to 63%), less worried about walking alone at night in strange areas (57% think it is very risky compared to 67%) and less likely to see smoking as high-risk (70% compared to 76% of Millennials in 2004).

The only exception to this rule is binge drinking. Generation Z are much more likely to think this is high-risk than Millennials did – seven in ten (70%) think this is very risky compared to just 56% of Millennials at an equivalent point in 2004.

GEN Z ARE LESS WORRIED ABOUT RISKY BEHAVIOUR THAN MILLENNIALS AT THE SAME AGE – EXCEPT BINGE DRINKING – UK

% think is very risky



Source
Young People's Omnibus 2018/ Nestle Family Monitor Survey of Young People's Attitudes 2004

Base
c.30 11-15 year olds, 5 Feb - 6 April 2018

This means that the stark generational behaviour change is not due to a concomitant change in how risky young people view other types of behaviours.

Arguably, a reduction in these types of bad behaviour may be less to do with shifts on risk perception and more to do with changing social norms. People are more likely to do things if they think others are doing them too – teenagers today are simply coming into personal contact less frequently with these types of behaviour. And in turn, they are less personally affected by it. This is good, because social norms become self-reinforcing. But this lack of contact can be double-edged, because if people are less likely to see the negative impact of the behaviours this may make them more complacent.

FINAL THOUGHTS ...

As we'll see throughout this report, there is no one clear shift on risky behaviour, and not all of Gen Z are behaving in a particular new way on drugs and sex.

But the balance has definitely tipped towards milder rather than wilder youth. And this is a continuation of trends seen in Millennials, not a sudden switch. It has been embedding over many years.

But it would be a mistake to assume this means that it's guaranteed into the future. As our new data on perceptions of risk shows, this is not a change in how risks are viewed by the young. It's not due to a shift in young people's internal risk calculus, but instead suggests that changing cultural, technological and legal environments are far more important. This is not a guaranteed downward trend and we cannot sit back and hope it will continue. Continued support and intervention will remain key to ensure that future cohorts of young people follow this downward trend.

But it also offers up a plethora of new opportunities for brands and other institutions to engage with young people in different ways. Thrills will be found elsewhere, and products need to be updated for this new outlook.

HEALTH TIME BOMB / HEALTH CONSCIOUS

IN BRIEF

GEN Z AND HEALTH

- There is a slow upward trend in childhood obesity across Europe and the US, but prevalence varies from country to country and rates in many European countries have stabilised.

- However, the odds seem currently stacked against Generation Z maintaining a healthy weight into adulthood (along with Millennials, they are 2-3 times more likely to become obese or overweight compared to older generations in England).

- The strongest indicator of obesity in children is socioeconomic, not generational. There is a wide range of BMIs within Generation Z – with those in lower-income households much more likely to be overweight or obese. Approximately 27% of childhood obesity has been estimated to be directly linked to lower household income.

- There appears to be a 'cohort effect' towards lower physical activity in some countries – in part due to more online time. There has been a halving of the proportion meeting the recommended activity levels, with over half of 13-15 year olds in England classed as 'low activity' – nine percentage points more than eight years ago.

- But more positively, average free sugar (sugar added to food by manufacturers or consumers) intake among children has significantly reduced since 2008, mostly due to a decline in sugary drink consumption.

THE IMPLICATIONS AND THE FUTURE

Childhood obesity is everyone's problem

Pressure to act effectively on childhood obesity is here to stay. Legislation has been introduced in countries including the UK, Canada, Portugal and France to increase the price of unhealthy or sugary food and drink; and manufacturers and supermarkets have come under increased pressure to change their product ingredients, layout, branding and advertising campaigns.

However, so far, these initiatives have often been patchy and focused on select issues. A dawning realisation that interventions are most effective when public health bodies, business, government and non-profit leaders work together is already encouraging some multi-sector responsibility and collaboration on obesity issues (although more is needed).

There are many examples of local government seeking partnerships with private developers and community groups to tackle childhood obesity in their local area. Health goals are being integrated into the strategies of other departments, such as town planning, where local governments are collaborating to expand the opportunities for physical activity, such as building more recreational facilities, parks and playgrounds.

Community and local programmes – such as Guy's and St Thomas' Charity's (a public healthcare provider in London) campaign 'Bite Size' – are looking to collaboratively tackle the health socioeconomic disparities that shape Generation Z's obesity levels. Bite Size focuses on reducing the higher levels of childhood obesity in more deprived areas of Greater London, working with other charities, as well as public and private sector organisations, to look at the home and school environments. [32]

THE GLOBAL PUSH TO REDUCE SUGAR IS GAINING MOMENTUM

With the increase in childhood obesity rates slowing, high public acceptance of intervention to improve children's diets and a more system-focused approach that recognises the inter-relation of different influences on our diet, we could be approaching an inflection point in the seemingly inevitable increase in obesity in much of the western world.

A future less sweet

Central to this more hopeful view of the future is that the global push to reduce sugar consumption is gaining momentum. Attitudes of legislators and consumers indicate that producers and retailers who resist the need to change will likely find little support from either group.[33] As Ipsos MORI's recent report on trends in sugar has shown, people are ashamed of high sugar consumption – and people do not protect what they're ashamed of.

It seems this attitudinal shift on sugar has led to real behaviour change among parents and children – with Generation Z less likely to consume free sugars and sugary drinks. There is, therefore, a huge space for developing chocolate bars and treats for children that have less sugar.

In 2018, Nestlé released Milkybar Wowsomes – the first example of a chocolate bar containing less sugar without using artificial sweeteners. Wowsomes contain 30% less sugar than a typical chocolate bar by using physically altered sugar. With an immediate share boost for Nestlé, this was an example of companies keeping on top of public demand and policy intervention. The potential market for less sugary snacks is huge – and likely only to expand to meet the attitudinal and behavioural shifts among children and young people.

Of course, public opinion and the regulatory environment can be fickle, and one of the top future-focused questions for manufacturers is whether this is a passing fad or the start of a long-term trend: reformulation is difficult and expensive, and dietary health guidelines and pariahs are notoriously changeable. Sugar wasn't really mentioned in US dietary guidelines as recently as 2005, when the focus was very much on fat. But at this point, momentum seems to be growing rather than shrinking.

The health tech boom

Another positive implication of the cultural concern about obesity is the stimulation of a wider and more innovative set of means to help Generation Z keep a healthy weight into adulthood. As much of Generation Z's personal environment is, and will continue be digital, an important method to tackle obesity will be through technology, which is exactly what is happening now. Wearable devices such as the Apple Watch are becoming more common, and there is incredible potential to utilise the data captured by these gadgets for incentivising healthier behaviour. Health tech which encourages physical exercise is already becoming smarter, smaller and more integrated. The sports equipment company Oakley's Radar Pace glasses offer automated coaching and information and miles and pace through built-in headphones.[34]

However, to be successful, the potential of these technologies needs to reach not just those already involved in sport, or the middle classes who can afford them. Tech is also becoming more integrated – combining data on physical exercise, calorie intake and personal biology information to help people manage their diet and overall wellbeing. While advanced tech is currently focused, for the most part, on helping patients tackling illness and disease, there is a huge market for using the same algorithms to encourage people to better self-manage their weight and overall health. One such example is the app LivingWith, which helps cancer patients manage appointments, record their feelings and connect with others – it also syncs with other fitness wearables to help patients self-manage their broader health. Broadening the application of these approaches, building them into day-to-day life, including through their clothing (see opposite) could well be a reality for Gen Z.

NO GADGET TOO SMALL

Since the Nobel Prize-winning discovery of graphene – tiny, molecule thin thermal sensors – the team at Bonbouton has developed an impressive array of smart clothing. The sensors, seamlessly integrated into clothing, can measure a number of vitals including body temperature, heart rate, breathing, sleep and muscle motion.

The clothing can be used not only to monitor exercise, but can be used to predict injury, detect infection and has already been lauded for its use in tracking and helping manage diabetes.

The company has even more ambitious plans for the future – hoping to integrate into mobile platforms so that patients and physicians can interact with each other, patient data can be monitored, personalised treatment plans can be developed and treatment progress tracked.

TECH IS ALSO BECOMING MORE INTEGRATED – COMBINING DATA ON PHYSICAL EXERCISE, CALORIE INTAKE AND PERSONAL BIOLOGY INFORMATION TO HELP PEOPLE MANAGE THEIR DIET AND OVERALL WELLBEING

THE CURRENT EVIDENCE

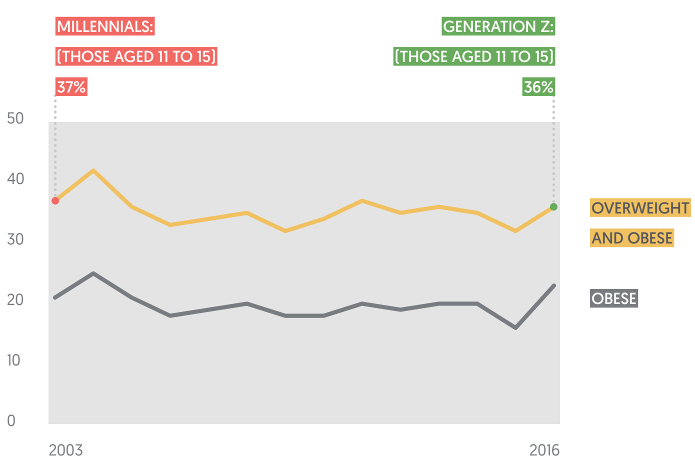
Childhood obesity is a chronic condition in the western world, not an acute one

Childhood obesity has not massively increased in many countries across the western world over the past 15 years or so. Although prevalence varies from country to country (and with the caveat that there are different ways to measure obesity), only in some Eastern European countries has there been a consistent significant increase in obesity in 11-15 year olds since 2002 – and this is partly due to the relatively low prevalence of obesity during that period (for example, obesity among Russian secondary school children has increased from 1% to 4%).[35]

But for the rest of Europe, childhood obesity has generally stabilised over the last few years – with some countries, such as Portugal, even seeing a downward trend among school children.[36]

CHILDHOOD OBESITY HAS REMAINED FAIRLY STABLE – ENGLAND

% children 11-15 year olds overweight and/or obese



Source
Health Survey for England

Looking at England in detail as one example, obesity among secondary school-age children (11-15), has fluctuated year-on-year, but since 2003 it has pretty much stayed the same. A quarter of 11-15 year olds (23%) are obese and more than a third (36%) are overweight or obese. An approximate like-for-like comparison with Millennials in 2003 shows that almost exactly the same proportion of 11-15 year old Millennials were obese (21%) and overweight or obese (37%) at that time.

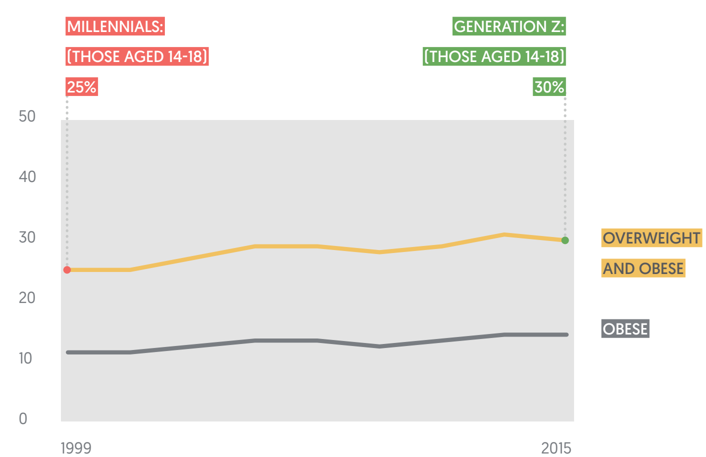
The fact that a third of adolescents are obese or overweight has serious implications for individuals, and society as a whole – but it does mean that, as a cohort, English Generation Z are no more or less likely to be overweight than Millennials were at the same age. At least, on this measure and in England, childhood obesity has stopped escalating.

In the US, we see a slightly more worrying trend. Generation Z high schoolers in 2015 are more likely to be overweight or obese than their Millennial counterparts were in 1999 (30% compared to 25%).[37] But even here, increases have been shallow

HIGH SCHOOL OBESITY SLIGHTLY ON THE RISE – US

% children 14-18 year olds overweight and/or obese

Source
Ipsos MORI reanalysis of the Youth Risk Behaviour Survey



GENERATION Z MAY ALREADY HAVE THE ODDS STACKED AGAINST THEM TO STAY A HEALTHY WEIGHT IN THEIR ADULT LIVES, AND WILL NEED ALL THE HELP THEY CAN GET

over the last 16 years and mostly involve increased numbers of high-schoolers being overweight rather than obese.

Generational odds stacked against them?

However, this cohort-based slowdown in absolute obesity levels does not necessarily mean that adult obesity won't become worse. A study examining cohort body mass index (BMI) across all five living cohorts in the UK (Generation Z, Millennials, Generation X, Baby Boomers and Pre-War) predicted that Generation Z have already developed a higher probability than older generations to become overweight or obese when they're adults.[38]

Although not without caveats, this study found a concerning split between children born in England after the 1980s (Millennials and Generation Z) and those born before. By age ten, the estimated probabilities of being overweight or obese after the 1980s were 2-3 times greater than those born before the 1980s. If this is correct, Generation Z may already have the odds stacked against them to stay a healthy weight in their adult lives, and will need all the help they can get. The authors attribute this to Generation Z's increased exposure to conditions which will cause obesity as they age. These 'obesogenic' factors can be found in all aspects of Gen Z's life, and include social/cultural norms (many more adults who children interact with are obese or overweight); parental factors (around knowledge, cooking skills, time available); environmental factors (accessibility or convenience of places to exercise or what food is available at school, at home; food adverts they see) – all of which, although we're seeing improvements, are more geared towards promoting obesity than their parents ever had growing up.

Socioeconomic inequalities trump cohort factors

Whether this pre-disposition towards obesity leads to greater prevalence among adult Generation Z remains to be seen. However, one of the strongest and most consistent correlations with childhood obesity in Europe is not cohort-based – it's based on income and social class. Within Generation Z, there is a wide variation in BMI between children living in the richest and poorest households. On a European level, countries with higher levels of socioeconomic inequalities generally have higher levels of childhood obesity.[39]

In Slovakia, for example, adolescents from lower socioeconomic groups were less likely to be physically active.[40] In England, a third (32%) of children (aged 2-15) in the lowest household income percentile were overweight or obese, compared with just 18% of children living in the highest income percentile.[41]

And this gap appears to be widening over time. The Health Behaviour in School-aged Children (HBSC) survey, controlling for other factors, calculated that 18% of childhood obesity in 2002 across 34 countries was attributable to socioeconomic differences. This essentially means that in a world where

WITHIN GENERATION Z THERE IS A WIDE VARIATION IN BMI BETWEEN CHILDREN LIVING IN THE RICHEST AND POOREST HOUSEHOLDS children were socioeconomically equal, 18% fewer children would be obese. In 2014, this estimate had risen to 27%, indicating that socioeconomic differences are becoming a more significant influence on childhood obesity.[42]

It is important to note that this doesn't mean lower income causes higher levels of childhood obesity. In fact, studies attempting to link a causal relationship have concluded there isn't one [at least in the UK].[43] The nature of this correlation is not clear. Some have argued a reverse causality – where obesity is a cause of lower household income [among adults] due to obese people suffering labour market discrimination and public stigma,[44] but it seems likely to be an interaction.

Sedentary lifestyles of Gen Z

However, there is generational cause for concern if we look at some of the associated causes of obesity. Physical activity is a complex behaviour and can be measured in different ways [where frequency, duration and intensity all play a part], but generally the guidelines for children and young people are to get 60 minutes of at least moderate-intensity activity a day.

OVER HALF OF GEN Z CHILDREN AGED 13-15 ARE 'LOW ACTIVITY' AND ONLY 12% ARE MEETING RECOMMENDED LEVELS – ENGLAND

	Meeting recommended levels of physical exercise	Classed as 'low activity'
YOUNGER MILLENNIALS IN 2008 Those aged 13 to 15	21%	41%
GENERATION Z IN 2015 Those aged 13 to 15	12%	52%

Source
Health Survey for England

MORE THAN HALF OF 13-15 YEAR OLDS ARE CLASSED AS 'LOW ACTIVITY' [52%] – THE LOWEST CATEGORY – WHICH MEANS THEY'VE BEEN GETTING LESS THAN HALF AN HOUR'S EXERCISE A DAY

Self-reported levels among adolescents in Europe is a mixed bag – with some countries such as Norway, Poland and Ukraine seeing a rise in the number of young people hitting the recommended activity levels. Yet in countries such as Belgium, Denmark and Greece there has been a significant decrease in activity levels between 2002 [Millennials] and 2014 [Generation Z].[45]

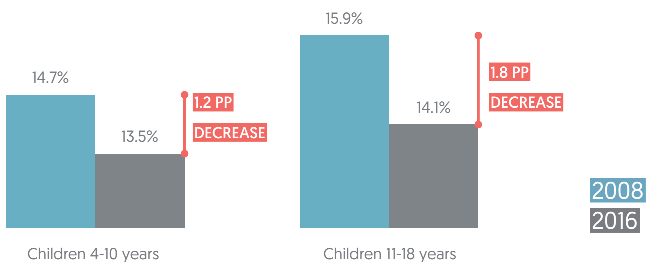
One of the countries with the biggest shift in self-reported activity levels is England – where Generation Z aged 13-15 are nearly half as likely to meet recommended levels of activity for children as Millennials were in 2008.[46]

Perhaps even more concerning, more than half of 13-15 year olds are classed as 'low activity' [52%] – the lowest category – which means they've been getting less than half an hour's exercise a day. This is a clear shift, and if a generation of children have not been habitually exercising for the correct amount of time per day, then the likelihood of adult obesity among Generation Z is arguably higher.

Again, reflecting the connection between socioeconomic characteristics and weight, young people from households with higher income met the recommended guidelines more often. For example, in Italy, girls from the most affluent families were twice as likely as girls from the least affluent families to get at least 60 minutes of exercise per day [boys were 1.8 times as likely].[74]

CHILDREN ARE CONSUMING LESS FREE SUGARS – ENGLAND

Free sugars intake (% of total energy)



Source
National Diet and Nutrition Survey

A life less sweet

More cheeringly, in England at least, Generation Z seem to be consuming less free sugars than Millennials were.

Taking the latest results from the National Diet and Nutrition Survey (NDNS), the mean intake of free sugars among English children aged 11-18 years in 2015-2016 is significantly lower compared with 2008-2010. This drop is thought to be at least in part down to children consuming fewer sugar-sweetened beverages. Children aged 4-10 in 2008-10 consumed around 130g of sugary drinks a day, compared with the 83g consumed by the same age group today.

This seems to be a European-wide shift in behaviour among children and young people. The HBSC survey recorded an 11% drop in daily consumption of soft-drinks in adolescents between 2002 and 2015 (from 29% to 18%) across 32 European countries.[48]

FINAL THOUGHTS ...

Overall then, it seems most likely that Generation Z will continue on the trajectory to high levels of obesity – although not as part of an acute obesity crisis unique to this particular generation.

While the drivers of the obesity crisis remain very powerful, Gen Z will have access to a wider and more innovative set of ways that will make keeping a healthy weight into adulthood easier – particularly from the combination of greater systemic intervention from legislation, the use of emerging technology and a better appreciation of how to use behavioural science to nudge them towards healthier outcomes.

For example, we know Generation Z spend much more time interacting online with friends and communities of interest. The wider repertoire in which younger generations connect with people online is already creating new online resources and approaches for engaging people in managing their own health.

We may be seeing an inflection point in the health of young people in western countries. It may be too late to entirely turn around the future for many in this cohort, but a lot is still up for grabs, and the youngest in Gen Z (and generations to follow) may mark the end of a sense that a fatter future is inevitable. Ensuring this brighter, lighter future is spread more evenly across socioeconomic groups will be the crucial challenge.

TRUSTING / CYNICAL

IN BRIEF

GEN Z AND TRUST

- Generation Z are much more likely to trust other people compared with Millennials at the same age – six in ten (61%) of Generation Z trust the person in the street to tell the truth, compared with just a third (36%) of Millennials at an equivalent point in 2002.
- But, this says more about the unusual attitudes of the Millennial generation rather than a surge towards a more trusting Generation Z – who are actually just back on par with older generations.
- Talk of a new 'crisis of trust' in institutions is overblown. People have always had varying degrees of scepticism towards big institutions, and Gen Z are no different to previous generations.
- Some institutions are even enjoying generational increases in trust – civil servants in the UK are trusted by 80% of Generation Z, more than Millennials at an equivalent age.
- But, Gen Z are less likely to trust information simply because it is on the internet. Only half of 12-15 year olds (49%) think the news they see on news websites is

mostly or totally true, compared with almost nine in ten (87%) of 12-15 year olds (young Millennials) in 2008.

THE IMPLICATIONS AND THE FUTURE

Digital education: Reading, writing and recognising fake news

A bounce-bank in levels of trust in people has a number of positive implications – just as a particularly distrusting Millennial generation had negative ones. It seems to indicate that technology and mass media – factors identified as crucial to explaining declines in trust by Robert Putnam, the influential US academic who has examined declining trust levels for decades – may not have as one-sided a negative impact on trust as we once thought. At least not for a generation who have a greater ability to separate the multitude of information online into fact and fiction, relevant and irrelevant – a skill Millennials had not mastered when younger. This type of skill could be key to maintaining interpersonal trust levels within Generation Z in the future.

There are already calls to incorporate digital and media literacy into school curriculums. A recent initiative by the Italian government, in partnership with digital companies such as Facebook, aims to teach school children how to discern 'fake news' and conspiracy theory from reliable sources.[49] This formalised approach needs to become more widespread, as these skills become evermore central to forming realistic views of the world.

A RECENT INITIATIVE BY THE ITALIAN GOVERNMENT, IN PARTNERSHIP WITH DIGITAL COMPANIES SUCH AS FACEBOOK, AIMS TO TEACH SCHOOL CHILDREN HOW TO DISCERN 'FAKE NEWS' AND CONSPIRACY THEORY FROM RELIABLE SOURCES

THE INTERNET IS INCREASINGLY THE MEDIUM THROUGH WHICH ALL INFORMATION WILL BE DELIVERED FOR GEN Z

The growth of triangulation of information

This ability to discern in Generation Z means we may see a growing (and welcome) hard-headedness when it comes to dealing with online news, information and disinformation. This is important because the internet is increasingly the medium through which all information will be delivered for Gen Z. The internet allows formerly discrete news mediums such as TV, newspapers and radio to break free of their moorings; so whether they are reading newspaper apps, streaming TV news broadcasts or scrolling through Twitter, Gen Z are using the internet for information.

This will further enable the growth of triangulation, where information is sought from multiple perspectives and a personal decision is made on which is more credible, entertaining, or interesting. It is no longer about using the internet for 'brand research', it now acts as the primary filter through which people make decisions about what information they consume, and even who they vote for. There's no doubt Generation Z will be at the forefront of this trend, and it will become important for brands and institutions to diversify the media through which they communicate with a generation who have no problem flicking through multiple sources to find one they trust.

THE CURRENT EVIDENCE

There are few concepts more nebulous or context-driven than 'trust' – who do we trust, to do what, and in what circumstances? But it is an important concept, and in an era where bots and fake news have entered the public consciousness, understanding how to project and build trust with consumers is a priority for governments as well as for companies large and small.

However, for a generation whose oldest members are just 22, the amount of hard data out there on trust levels and their drivers is limited. Therefore, this is a massive area worthy of further study; here we will be looking at distinct areas where we have enough data to draw tentative conclusions – trust in people, trust in [some] institutions and trust in the news.

Trust in their fellow man: the kids think people are alright.

Millennials were a cause of some concern when they were younger. Consistently less likely to trust other people, particularly in the UK and US, they have only recently begun to loosen up a little and trust others to tell the truth. But now that Generation Z are old enough to be mapped onto the adult Ipsos MORI Veracity Index, we can see that they are utterly different from their suspicious predecessors.

GEN Z ARE TWICE AS LIKELY AS MILLENIALS TO TRUST OTHER PEOPLE

% generally trusting the man/woman in the street to tell the truth

MILLENNIALS IN 2002
Those aged 15 to 22
36%

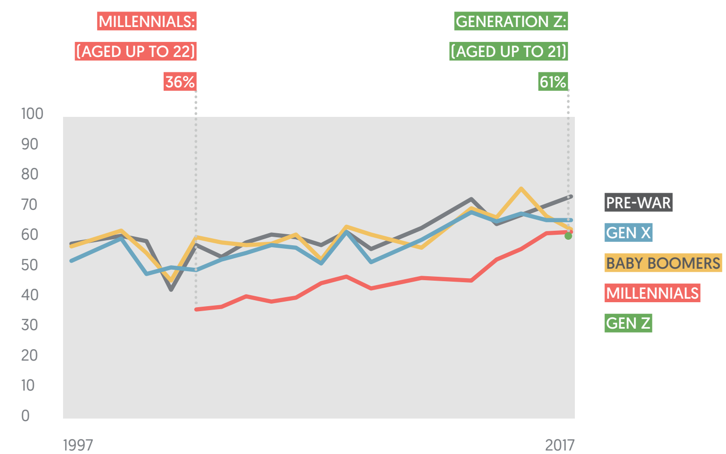
GENERATION Z IN 2017
Those aged 15 to 22
61%

Source
Ipsos MORI
Veracity Index

Six in ten of Generation Z said they trusted the person in the street to tell the truth in 2017 [61%], a figure which is nearly double that of Millennials when they were the same age in 2002. Back when Millennials were up to 22 years old, only a third [36%] felt that they could trust the person in the street to be truthful.

GENERATION Z TRUST IN THE PERSON ON THE STREET IS STARTING MUCH HIGHER THAN MILLENNIAL TRUST

% generally trusting the man/woman in the street to tell the truth



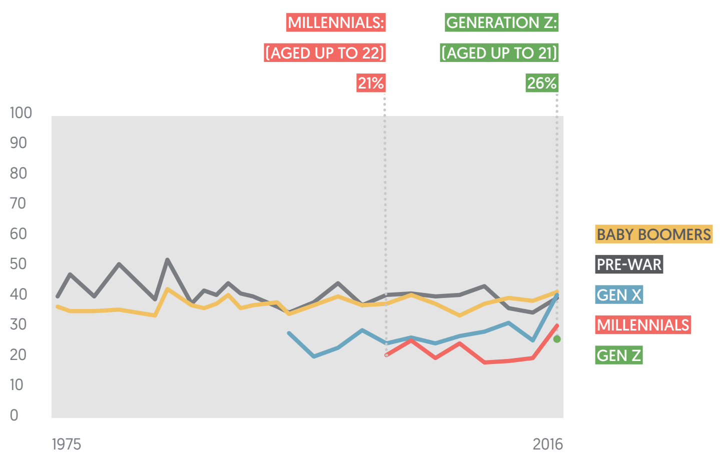
Source
Ipsos MORI
Veracity Index

So does this mean we should expect a new age of trust? Not really. Generation Z are more trusting than Millennials certainly – but this says more about how abnormally distrusting Millennials were than how trusting Generation Z are now. The long-term data suggests that Generations Z's views are avowedly average – simply a reversion to the mean. Since the early 2000s, Millennials have trailed all other generations on trusting the average man or woman in the street, only catching up with everyone else in 2017 [when the oldest of the group were well into their mid-30s].

In the US it's a similar picture, although the cohort effect is less surprising. A generational pattern of falling trust had been

GEN Z ARE STARTING ADULTHOOD MORE TRUSTING THAN MILLENNIALS IN THE US

% agree 'most people can be trusted'



Source
Ipsos MORI reanalysis of General Social Survey

established since the early 90s, with both Generation X and Millennials less trusting than the generations before them. But now that we can measure Generation Z for the first time, that pattern is decidedly broken. Only about a quarter [26%] say most people can be trusted, which, although less than other age groups currently, compared with Millennials at an equivalent point in 2006, Generation Z are starting out adulthood more trusting.

Trust in 'The Man': still no crisis

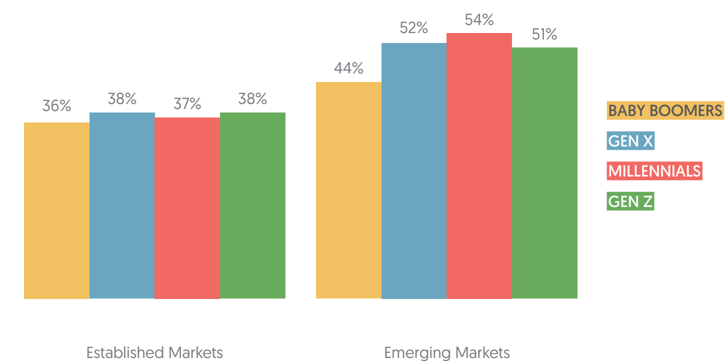
The preoccupation of firms, institutions and brands with a 'crisis of trust' among people in general, and the young in particular, continues to baffle us. There's no real evidence for it. Yet still there are self-perpetuating reports on how Generation Z [most of whom have yet to hit adulthood] are anxious and distrustful,[50] are brand-wary,[51] and lack trust in public institutions.[52]

But any fears about Generation Z rejecting the basic trust relationship between institutions and their citizens or consumers are looking just as misplaced as they were about Millennials. Distrust in institutions continues to be a cultural, long-term phenomenon in the western world – it's not a generational thing, and young people are just as likely to say they trust institutions as anyone else.

Looking first at global trust in businesses using the latest Ipsos Global Trends Survey, Generation Z are just as likely to trust companies as other age groups in established and emerging markets. Trust in businesses is notably higher among emerging markets – with half [52%] of the population saying they have a high level of trust compared to 37% of the population in established markets. But Generation Z are on a par.

NO REAL DIFFERENCE BETWEEN GENERATION Z'S TRUST IN BUSINESSES AND THE CULTURAL SENTIMENT

% agree 'I have a high level of trust in businesses in general'



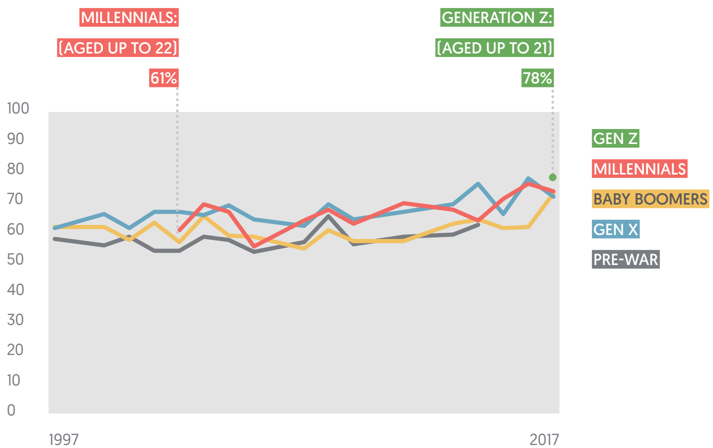
Source
Ipsos Global Trends Survey

Base
17,180 adults 16+ across 22 countries, online, 12 Sep - 11 Oct 2016

Additionally, in terms of other institutions and experts, there's just no evidence Generation Z's trust has collapsed. Although based only on British analysis, we can split data from Ipsos MORI's Veracity Index by generation, and what we see is that there is no institution which seems in danger of experiencing any kind of generationally-driven 'crisis of trust'. Generation Z trust levels just don't vary massively from the rest of the population when it comes to key institutions like the police, judges, priests and clergymen, scientists and journalists.

THERE IS NO GENERAL DECLINE IN TRUST IN THE POLICE

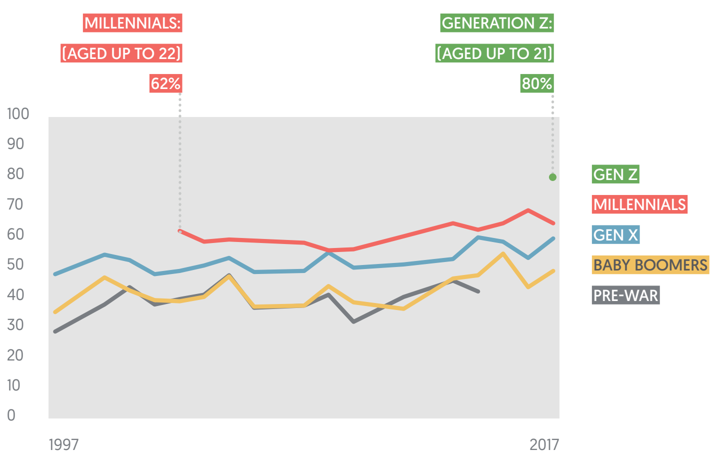
% who trust the police to tell the truth



Source
Ipsos MORI
Veracity Index

GEN Z ARE MUCH MORE LIKELY TO TRUST CIVIL SERVANTS THAN MILLENNIALS WERE

% who trust civil servants to tell the truth



Source
Ipsos MORI
Veracity Index

FOUR IN FIVE OF GENERATION Z (80%) TRUST CIVIL SERVANTS TO TELL THE TRUTH – MORE THAN ANY AGE GROUP CURRENTLY

In fact, Generation Z, at least according to the latest data, appear to be continuing the generational pattern of increasing trust in the central government bedrock of civil servants. Four in five of Generation Z (80%) trust civil servants to tell the truth, more than any age group currently, and significantly more than Millennials did at an equivalent point in 2002 – just 62% trusted civil servants when they were aged up to 22 years old (which itself was a higher level of trust than previous generations).

This doesn't mean that institutions should not be working hard to try and establish credibility with the public and consumers, but fears that suddenly a new generation of young will want nothing to do with them are unfounded. Trust in institutions is clearly not something that implodes so easily, which should be reassuring.

But a sceptical eye on the news

It would, however, be wrong to think Generation Z are completely trusting. This in itself is not a bad thing, as Onora O'Neill and other great thinkers on trust have suggested – trust foolishly given is potentially a more dangerous trend, and really, we should be focused on the extent to which institutions are 'trustworthy'.[53] Plus Generation Z's attitudes to different branches of the news does suggest discernment.

As a cohort, Gen Z are much pickier about online sources of information. Unlike Millennials, who straddle the information technology revolution that has occurred worldwide since the nineties, Generation Z are the first fully internet-enabled generation. This also means this generation is completely removed from the home-spun utopian hopefulness that typified much of the early internet age. Looking at the views of 3-15 year olds about news online from a 2017 poll by Ofcom, the telecommunications regulator in the UK, we can see signs of the emergence of a greater level of worldliness among this generation than that which existed among those who went before.

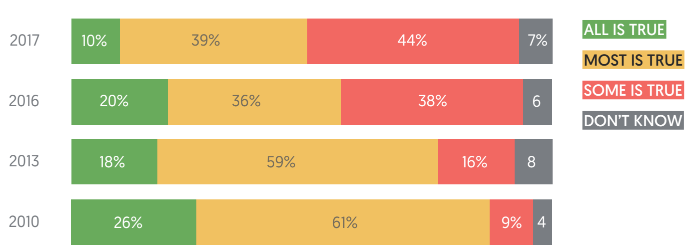
The primary difference is a decline in trust of online news outlets. Among 12-15 year olds in the 2017 survey, half (49%) felt that the news they see on news websites and apps was either entirely or mostly true. When this survey was carried out with the same age group in 2008, young Millennials were found to be much more credulous – then, almost nine in ten agreed that the news they saw online was entirely or mostly true (87%).

We can observe the same pattern for social media, although trust levels were never as high as they were for more official news outlets. The proportion of 12-15 year olds in 2010 who felt that things they saw on social media were either entirely or mostly true was 40%. Among Gen Z 12-15 year olds the comparative figure is 24% in 2017 (in fact a small rise from 2016).

This matters because online news is reaching a level of pre-eminence among the young that is unmatched even by the importance of TV to older generations. Other Ofcom research shows that two thirds of 18-24 year olds (64%) claim online sources are their primary source of news – and a third (33%) use social

GENERATION Z'S BELIEF THAT EVERYTHING THEY READ ONLINE IS TRUE HAS BEEN FALLING

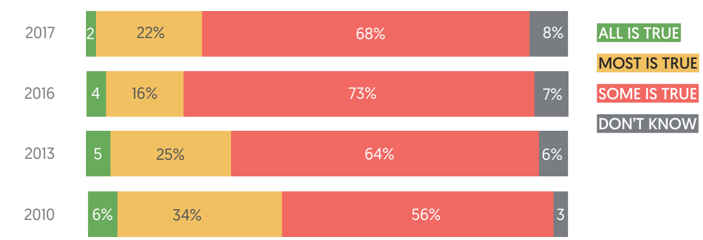
'Do you believe that all the information you see on these sites or apps is true, most of it is true or just some of it is true?' (sites/apps about news and what is going on in the world: 12-15 year olds)



Source
Ofcom

TRUST IN SOCIAL MEDIA SOURCES IS FALLING TOO, BUT IT WAS NEVER THAT HIGH IN THE FIRST PLACE

'Do you believe that all the information you see on these sites or apps is true, most of it is true or just some of it is true?' (social media sites or apps like Facebook, Instagram, Twitter or YouTube: 12-15 year olds)



Source
Ofcom

media 'specifically for news. The direction of travel is clear and we can expect future generations to be even more dependent on the internet for news. By contrast, TV's hold on the over 55s is lower, with half saying this is their main source of information (51%).

A complicated picture is emerging in Generation Z here, combining an increasingly guarded (or realistic) attitude to trust in online sources with rising reliance on the self-same sources for news and information. This may represent the growth of a trend in the 'triangulation' of news sources that is also observed in Millennials – using a basket of information sources ranging from online to word of mouth, and drawing conclusions based on an interpretation of all of them.

FINAL THOUGHTS ...

Whereas with Millennials we assumed that tech had a role in the falling trust levels, actually this may have been a misreading of the trend, given that Gen Z are even more embedded in the tech explosion, but are actually more trusting in some ways. Instead, this puts more weight on the economic explanations for Millennials' trust issues, as great thinkers on trust like Robert Putnam in the US have argued. It is also the case that Generation Z have grown up around social media and online news sources. Perhaps this early learning experience with tech, and an environment propounding the risks of fake news, means they are more able to discern between fact and fiction – reducing the drain on their overall trust levels.

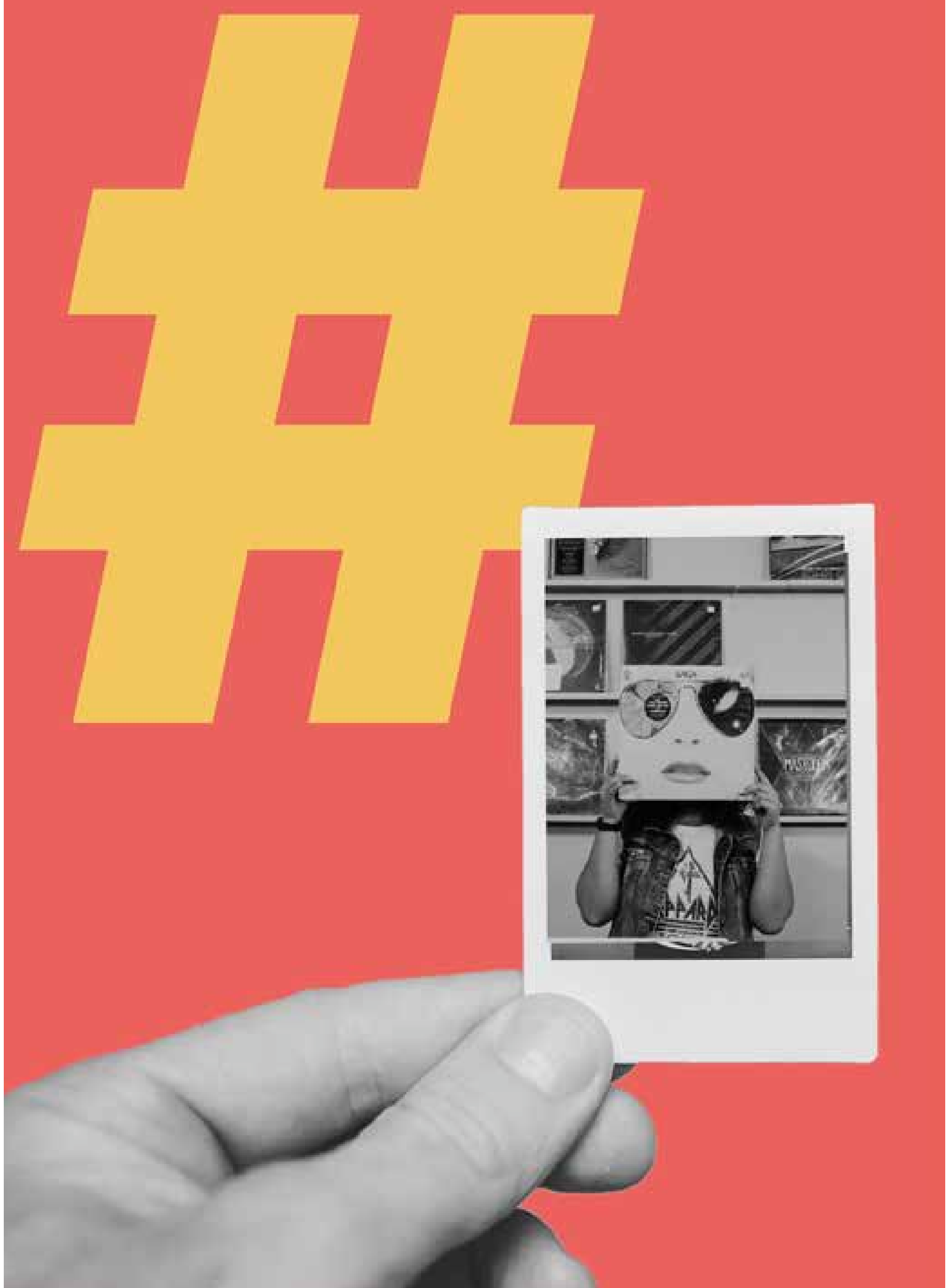
But there are two points of caution to this more optimistic view of changing trust.

First, Gen Z's discernment will be partly because the environment really has changed. There is more reason to be cautious online because there is more information than ever and the proportion that is misinformation has certainly not declined.

Second, leading on from that, it is wrong to assume that all Gen Z have innate super-human abilities to triangulate their way to a reality-based view of the world: they may be more used to the skills required, but they still need all the help they can get, as they are subject to the same human biases of looking for information that confirms our already held views and avoiding information that contradicts us.

Improving the information environment and equipping people with the tools to look out for themselves remain some of the key cultural challenges of our times.

TECHNOLOGY



NEW MEDIA / TRADITIONAL MEDIA

IN BRIEF
GEN Z AND MEDIA

- Communication and entertainment technologies rarely completely die. Instead they evolve and are supplemented by newer technologies, rather than being replaced entirely.

- And that seems to be the dominant pattern with Gen Z's media use – they are layering on more, and this is increasing the overall amount of time they are spending using any media, compared with other generations: today's teens and young adults are exposed to over 13 hours a day using media – over two hours more than any other generation.

- A lot of this is due to multitasking. Four hours a day are spent on two or more media activities simultaneously, double the amount of time we see with Millennials.

- This reflects the fact that the big shift is towards interactive communication, rather than straight consumption. One third of Gen Z's exposure to media is spent communicating, which equates to 22 hours a week, compared with around 15 hours for Millennials and under ten hours for Baby Boomers.

- But while communication takes up a much bigger share of their attention, the time they spend 'watching' is actually pretty similar to Millennials, simply because they spend so much more time with media.

- However, the nature of this 'watching' is changing significantly. Just a third of Gen Z's watching time is spent on live TV, while for Millennials it is over half, and for Baby Boomers it's around three-quarters. Paid on-demand TV or films and short online video clips make up a much greater share of Gen Z's watching habit, even compared with Millennials.

- This is mirrored in audio media, with the amount of time spent 'listening' actually pretty similar across Gen Z and Millennials. However, Generation Z spend only 29% of their audio time listening to live radio, compared with over half for Millennials, and 80% for the over 45s. Again, the gap is filled by more on-demand services, either streamed music or personal digital radio.

- Reflecting many other characteristics of Gen Z, their use of social media is a layering of platforms, with flatter use across services like Facebook, Snapchat and Instagram. There has been a decline in Facebook's dominance among this cohort of young, but it remains a vital part of their social media mix.

THE IMPLICATIONS AND THE FUTURE

TV: Fitting in the rhythm of their lives

It is undeniable that the way we watch content is changing, and no more so than for Generation Z. The youngest members of the household have always struggled to get their hands on the remote control, so it's no wonder that, with an alternative, Generation Z are watching less live TV and more on-demand content through video-on-demand services and YouTube.

But seeing other forms of video as a threat to TV, amongst any generation but especially Generation Z, is short-sighted. Other forms of video offer new opportunities to fit TV into their lives, to adapt and augment the TV viewing experience, rather than replace it. One of TV's past USPs for advertising is the emotional connection it can help to build. But while this has shifted somewhat, there is still a role for TV to be the centrepiece, connecting different media experiences.

WATCHING TV ON A TV SET IS STILL EVERY GENERATION'S FAVOURITE WAY TO WATCH

One way in which broadcast TV still sets itself apart from the competition is through its ability to create shared viewing experiences. Watching TV on a TV set is still every generation's favourite way to watch.[54] The heightened feelings and emotions when watching together are fairly unique to the TV set. For brands, leveraging this is vital to creating the strongest connections with consumers. Creating connections with Generation Z in shared viewing occasions, and then reinforcing them when they're on their own, means digital viewing can lead to a stronger relationship. With Gen Z, the power of advertising is in mirroring the multi-faceted nature of their viewing and wider media consumption, being where they are, when they are there.

At the other end of the spectrum from these bite-sized, multi-platform connections, binge watching full series has also become increasingly important, as the capability to do so has increased. Gen Z are the most likely to get hooked binge watching – but also see the downsides, in time (and sleep) lost. Content providers have to find the right balance between attracting and smothering the audience.

Break time for radio

The death of radio has been talked about since the arrival of the television – and it has still not perished. Will Gen Z finally kill the radio star?

Again, it seems unlikely. In fact, young people have been the lightest consumers of radio for decades, but their listening increases as they get older. There remains a life cycle effect that we can see in previous generations of young, and Gen Z are likely to follow to at least some extent. Radio also provides a valued service to many young people now: for example, it is one of the biggest ways in which Generation Z say they discover new music.

Radio, more than any other media, is about convenience. For example, as Generation Z start driving cars, their connection with radio as a medium is likely to develop (as it has for previous generations). However, the increasingly commonplace 'connected car' does raise challenges. As the dashboard evolves and becomes ever more connected, radio has more competition in the space that has historically been something of a fortress for radio. So it has to adapt to survive. To continue to own this space, radio needs to develop better integration into other audio services and become synonymous with voice-activated technology.

The future of radio could be in more snackable pieces of content, so listeners can choose what they want, when they want it. Generation Z don't tend to tune in to a broadcast schedule with any media. With their desire to explore and discover new music, short audio clips of different segments from wider shows would appeal. Ben Cooper, Controller for BBC Radio 1, BBC Radio1Xtra, and BBC Asian Network, has said he wants to create a Netflix for radio, enabling Generation Z to stay connected, but on their terms. This means making radio more accessible, in bitesize chunks, enabling this generation to explore, at a time in their lives when they are open to discovery.

THE FUTURE OF RADIO COULD BE IN MORE SNACKABLE PIECES OF CONTENT SO LISTENERS CAN CHOOSE WHAT THEY WANT, WHEN THEY WANT IT

The death of Facebook has been exaggerated – again ...

Generation Z are particularly likely to explore a wider range of emerging social media platforms, in addition to the established social media brands, such as Facebook and Twitter. We see small declines in the use and time spent on Facebook in favour of Instagram and Snapchat – but Facebook is still a vitally important part of the mix. As with other generations of young people, they have competing desires to stand out, but not miss out. Facebook, with its reach and centrality to many aspects of online life, therefore remains a key part of a wider set of platforms, providing different sorts of outlets.

Facebook's demise is therefore unlikely to happen any time soon, and it won't be this generation which seals its fate – although the mix will continue to diversify. One of the drivers for this social media diversification is how much this generation has learnt about the long-term impact social media can have on your future. Generation Z are growing up more aware of the possible implications from broadcasting a point-of-view or certain image of yourself that you later regret, but can't erase. Other services, such as Snapchat and Instagram, have seen success through features that control this exposure – and many of these are now being integrated into Facebook and other platforms too. These features hold appeal to a generation who want instant gratification, but don't want their digital lives replayed to them in ten years' time.

THE EVIDENCE

Generation Z live up to the claim that they are constantly connected. Ofcom's Digital Day[55] shows how on average, 16-24s are spending nearly nine hours per day consuming media or communicating digitally. This includes more than four hours of multitasking: time spent doing two or more of these activities simultaneously, for example, listening to music and texting at the same time. In total this amounts to an average of over 13 hours of exposure to media or communications per day.

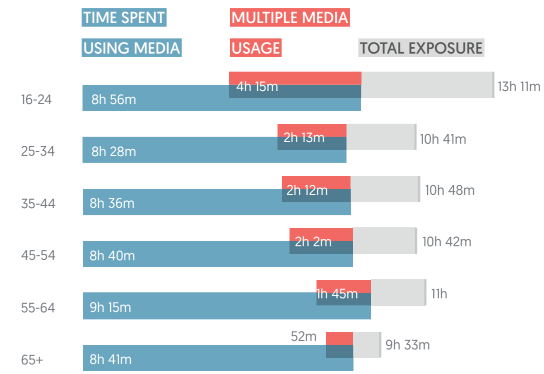
A third (32%) of older Gen Z's media and communication time is spent communicating (emailing, messaging, texting, calling and social networking) – more than any other age group. But that doesn't mean there has been any drop-off among younger age groups in the number of hours they spend on other types of activities – they simply spend more time doing everything. The actual amount of time spent watching content is on a par with Millennials (c. 25-44 age groups): Gen Z still spend well over a day (over 26 hours) a week watching media. The major break is really between Gen Z and Millennials on the one hand, and the older generations on the other, who spend much more time listening and watching content.

Younger Gen Z (those aged 11-15) spend less time on different communications and media activities overall, due to the amount of time they spend in school, as well

GEN Z SPEND NEARLY NINE HOURS A DAY LISTENING TO MEDIA, LOOKING AT A SCREEN OR ON A DEVICE. INCLUDING TIME SPENT MULTITASKING, THEY'RE EXPOSED TO OVER 13 HOURS OF MEDIA A DAY ON AVERAGE

OLDER GEN Z ARE EXPOSED TO OVER TWO HOURS MORE MEDIA PER DAY THAN ANY OTHER AGE GROUP – UK

Average daily media and communications time



13h
AVERAGE GEN Z DAILY MEDIA EXPOSURE

Source
Ofcom Digital Day 2016

Base
c. 1500 adults 16+

as earlier bedtimes, but they still cram in nearly 13 hours a week of digital communication (see chart overleaf).

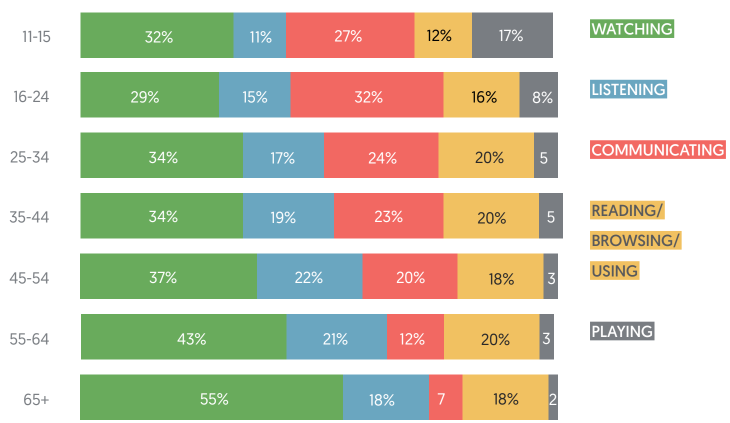
To view or not to view

There has been a decline in conventional TV watching in Britain, across all age groups, but it is particularly younger adults and children who are much less likely to spend time watching live TV. Compared with 2010 when Millennials were aged 16-20, older Generation Z now watch about an hour less live TV (55 minutes). And steeper declines among the younger age groups mean the age gap has become wider: 16-24 year olds now watch two hours less live TV a day on average than 25-54 year olds.

This is an international phenomenon. In both emerging and established markets, there is a large gap between the oldest and youngest generations watching TV on a daily basis. Three in five (58%) of Gen Z in emerging and established markets watch TV daily, compared with around four in five of Baby Boomers.

A THIRD OF GEN Z'S MEDIA TIME IS SPENT COMMUNICATING – MORE THAN ANY OTHER AGE GROUP – UK

Proportion of media and comms time spent on activities

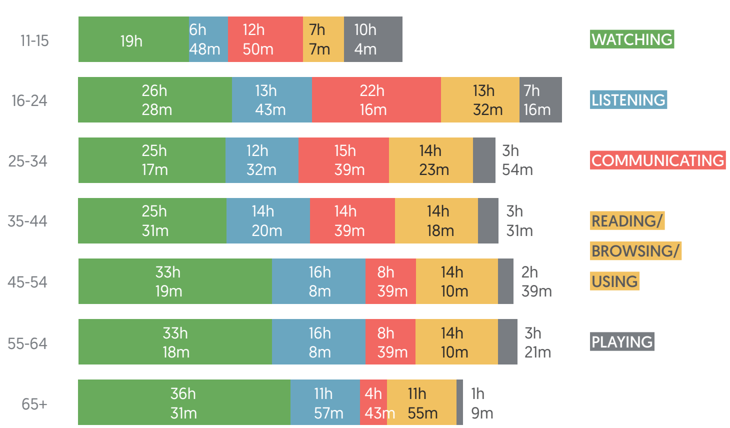


Source
Ofcom Digital Day 2016

Base
1,512 adults aged 16+ and 238 11-15 year olds

BUT THE AMOUNT OF TIME THEY SPEND WATCHING OR LISTENING TO CONTENT IS NO DIFFERENT FROM MILLENNIALS – UK

% Time spent on media and comms by activity per week



Source
Ofcom Digital Day 2016

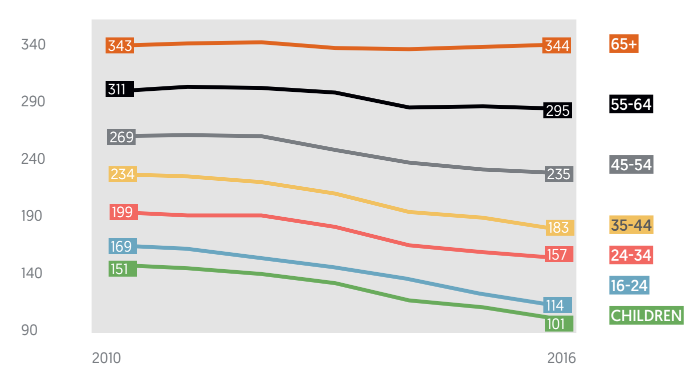
Base
1,512 adults aged 16+ and 99 11-15 year olds

But this doesn't indicate this generation is shunning TV content altogether – they are instead shifting towards different ways of watching. The 26.5 hours 16-24 year olds spend watching content each week is split more evenly across a range of different media. Over a third of their watching time (36%) is still spent watching live TV, but significant chunks of their time is spent on on-demand (both paid (20%) and unpaid (13%)) and short online video clips (14%).

Older generations, including Millennials, are comparatively more set in their ways in terms of watching live TV. There is evidence that the shift toward on-demand, streaming and online TV watching is being spearheaded by Generation Z. Three quarters (76%) of young people aged 16-24 use an online subscription streaming service (Netflix, Now TV and the like), compared with fewer than one in five (19%) older people aged 65 and over.[56] In the US, seven in ten (70%) Generation Z now access a subscription service. It seems that this demand is to the disadvantage of pay TV options, such as Sky and Virgin TV. A third (31%) of Gen Z have terminated their pay TV contracts in the past 12 months.[57]

YOUNGEST AGE GROUPS WATCH ABOUT AN HOUR LESS LIVE TV THAN IN 2010 – UK

Minutes spent watching live TV by age group

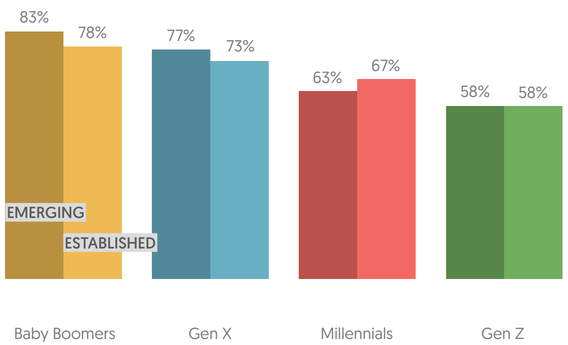


Source
Broadcasters Audience Research Board via Ofcom

Base
1,512 adults aged 16+

THE TV AGE GAP EXISTS IN BOTH ESTABLISHED AND EMERGING MARKETS

% watching TV, daily by generation



Source
Ipsos Global Trends Survey 2017

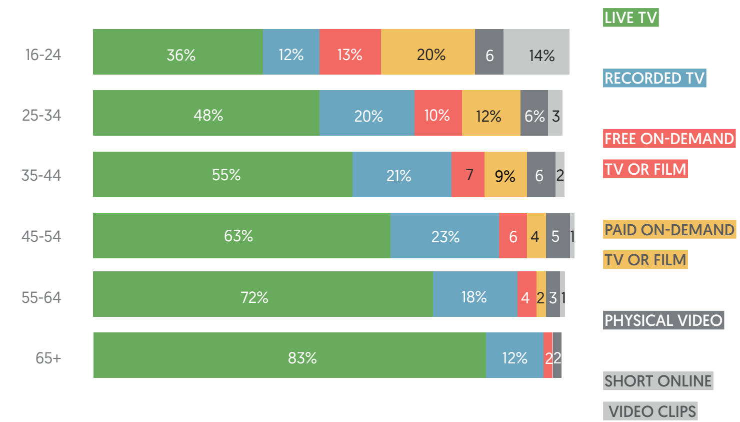
Base
18,810 adults aged 16+ in 23 countries, online, 12 Sep – 11 Oct 2016

Generations are also divided in the way they watch TV. Binge-watching TV is a habit much more prevalent among the young.[xx] More than half [53%] of those aged 12-15 enjoy weekly binge sessions, compared with just 16% of over-65s. For that older age group, more than half [59%] prefer the traditional release method of one episode per week.

BINGE-WATCHING TV IS A HABIT MUCH MORE PREVALENT AMONG THE YOUNG. MORE THAN HALF [53%] OF THOSE AGED 12-15 ENJOY WEEKLY BINGE SESSIONS

16-24 YEAR OLDS SPREAD THEIR TIME MUCH MORE EVENLY ACROSS A RANGE OF MEDIA

% of time spent watching by source



Source
Ofcom Digital Day 2016

Base
1,512 adults aged 16+

This bingeing is not just on whole series, but also short online clips, as seen in the generationally driven growth of YouTube, making it the most recognised content provider of fourteen brand examples shown to 12-15 year olds [94% recognised it], which was higher than BBC channels [82%].

Skip to the beat

Overall, the average amount of time spent ‘listening’ is fairly consistent across those aged 16-44, but how they get their content is very different. Whilst the dominance of radio is unchanged in the over-45s, younger generations are open to a much wider variety of sources. Just 29% of 16-24s’ listening time is spent listening to live radio, half the proportion of time spent by 25-34 year olds [59%], and only about a third of the oldest age group. Yet, they are far more likely to listen to audio by streaming music [about a quarter of their time] and listening via personal digital radios.

However, radio still has an important role to play in music discovery for younger people, but preferences may just have shifted online. In the US, 58% of 13-17 year olds listen to broadcast AM/FM radio, and although regular listeners have fallen over the past ten years (from 73% in 2007), the number of listeners to free online radio has increased. In 2007, 30% of 13-17 year olds listened to free online radio, by 2017 this had nearly doubled to 56%.[59]

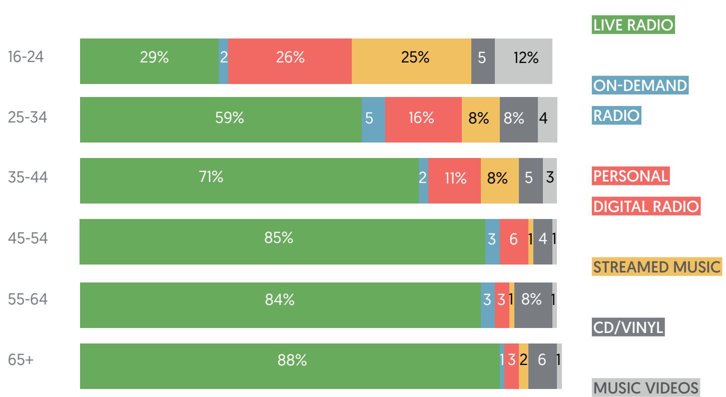
Back in the UK, 18% of 9-14 year olds claim to use podcasts weekly.[60] So even with this younger age group, there is potential for increased engagement with radio content in the future through the exploration of different delivery methods.

Digital readers

The differences in how Gen Z consume media is also emphasised in how they read newspapers and magazines. The figures for monthly reach of all publications in either digital or hard copy is actually very similar across all generations, with around nine

OLDER GEN Z LISTEN TO A VARIETY OF CHANNELS, BUT OLDER AGE GROUPS MAINLY LISTEN TO LIVE RADIO – UK

% of time spent listening by source

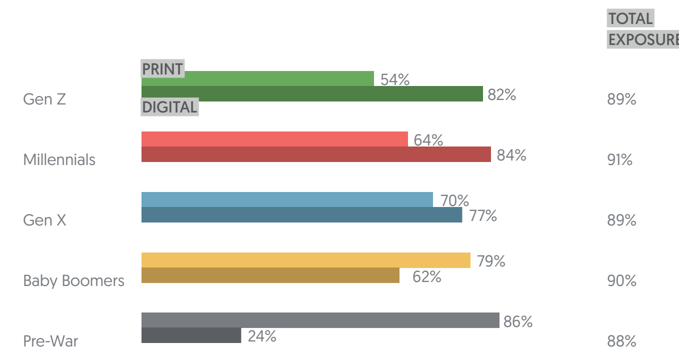


Source
Ofcom Digital Day 2016

Base
1,512 adults aged 16+

PRINT MEDIA IS REACHING FEWER OF GEN Z THAN ANY OTHER GENERATION

% reading newspaper/magazine publisher brands in print or digital at least monthly



Source
PAMco Monthly readership Apr 2017-Mar 2018

Base
34,767 adults

in ten seeing at least one hard copy or clicking on a news site at least once a month. But the split between these two is very different, with only 54% of Gen Z seeing a hard copy, compared with 64% of Millennials and 79% of Baby Boomers.

And in the other direction, only 24% of the Pre-War generation interact with publications online, although digital access is becoming more normal for Baby Boomers, with 62% seeing at least one online story a month.

The evolution of digital communications

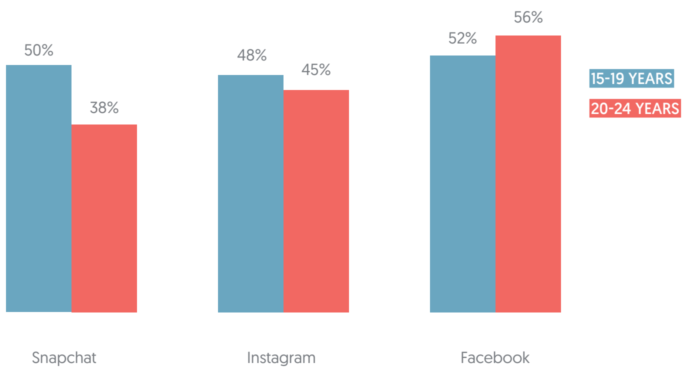
The spread of social media has massively changed how people of all ages communicate with each other – but it was Millennials who lived through the forefront of this rapid uptake and change. In 2007, just 54% of 16-24 year olds (older Millennials) had at least one social media profile, but by 2011 90% of the youngest Millennials (aged 16-24) had a social media profile.[61] This has since been entirely normalised for Gen Z as they come into their teenage years, with over nine in ten having at least one social media account.

But while access has stabilised, the use of different social media platforms is becoming more divided and varied by age, with use already more diversified within Generation Z than previous generations of young. Looking at the US in 2014, research from Pew shows Facebook dominated the social media landscape amongst the oldest Gen Z (then 13-17 years old). Seven in ten (71%) used Facebook, with no other platform coming close. About half used Instagram (52%) and 41% used Snapchat. Now in 2018, there's been a reversal, with 72% of 13-17 year olds using Instagram, 69% using Snapchat and just half (51%) using Facebook.[62]

Our Ipsos Tech Tracker data in Britain suggests a similar picture – with younger Gen Z more likely to use Snapchat and Instagram. Looking at recent usage (in the last three months), half (50%) of 15-19 year olds have been on Instagram, whilst just 38% of 20-24 year olds have used it in the same period. Facebook, meanwhile, is more likely to be used by 20-24 year olds (56% have been on Facebook in the last three months compared with 52% of 15-19 year olds). As with so much of Gen Z's behaviour and attitudes, the picture is of variety and diversity.

SNAPCHAT USE IS MUCH MORE FREQUENT AMONG YOUNG PEOPLE – GB

% using sites in last three months



Source
Ipsos Tech Tracker

Base
148 15-19 year olds, 329 20-24 year olds, face to face, 2-9 Feb and 28 Apr - 5 May 2018

VOICE RECOGNITION CAN'T YET KEEP UP WITH THE SPEED AND ACCURACY THEY CAN ACHIEVE THROUGH TEXT

But it's also worth noting that 63% of 16-24 year olds in the UK still consider Facebook their 'main' social media account.[63]

So it's true that Gen Z are often at the forefront of emerging tech and new media, but there are some types of tech that, arguably, are not such a natural fit with the way young people today use digital platforms. Take voice interfaces – a burgeoning type of tech that aims to connect humans with devices through voice. Virtual assistants, like Amazon's Alexa, Apple's Siri and Google Assistant, aim to mimic human conversation. As a rapidly expanding sector, you might assume that Gen Z are one of the most receptive groups to this type of device. But not so. Only 9% of Gen Z use voice assistants on a daily basis.[11]

This may be partly to do with age. As with their relationship with radio, their usage of voice interfaces may be affected by mostly not being old enough to drive – therefore having less of a need to use hands-free tech. But there's also arguably a barrier in the way Gen Z have grown up with tech. They're frequent texters – 57% of them use messaging apps at least half the time they are on their phone. Voice recognition can't yet keep up with the speed and accuracy they can achieve through text. And texting now has a wealth of ways to express emotion such as emojis or gifs, which, again, voice recognition can't yet replicate. Other advantages of texting – such as being able to have multiple conversations at the same time, or have private conversations while still being in shared environments – are also things that voice interface can't yet deliver.

But there's no doubt that Gen Z will adopt voice interfaces – everyone will. Voice interfaces will continue to develop and will (sooner rather than later) reach the same levels of efficiency that Gen Z can achieve via text. But Gen Z have grown up texting, and that's what they prefer – at least for now. The generation after them could be the first tech voice natives.

FINAL THOUGHTS ...

No one person consumes media in the exact same way as the next. Each individual has an ecosystem of media tailored to them. This is nowhere truer than with Generation Z. The amount of time this generation spend connected surpasses all other generations, at this moment in time but also when older generations were the same age. But this is mainly because the landscape has changed so much, moving media from living rooms and cars to the whole of our lives, not because of something innate in this generation.

It's not a surprise, therefore, that traditional media is not being replaced outright, it is being layered with new media. From radio to social media, there is room for multiple media channels to have influence and recognition in Gen Z's ecosystem.

As media evolves, the youngest generation is often the one which adapts quickest; they are interested in the new, and still have time to change and form their habits. For Generation Z, they are inundated with choice in terms of how they consume different types of media. But, for this generation, the defining principle is not that they watch, listen and read stuff in a different way. The thing that defines them is how communication, something which can rely on no media whatsoever, has infiltrated their lives.

There are many models of communication that attempt to sum up the era we're living in – for example, that we've moved from 'one-to-many' broadcast approaches to 'many-to-many' social media environments, or even from 'many-to-one' personalised communications. But with Gen Z the reality is again less binary than these distinct models suggest: those who can blend these different experiences will succeed.

NO ONE PERSON CONSUMES MEDIA IN THE EXACT SAME WAY AS THE NEXT. EACH INDIVIDUAL HAS AN ECOSYSTEM OF MEDIA TAILORED TO THEM. THE AMOUNT OF TIME GEN Z SPEND CONNECTED SURPASSES ALL OTHER GENERATIONS

TECH ENABLED / TECH WRECKED

IN BRIEF

GEN Z AND TECHNOLOGY

- Access to digital communications technology amongst young people is now all but ubiquitous in established markets. As well as the multiple benefits, there is, however, evidence that the digital world can exacerbate inequalities in the 'real' world.

- This is partly because the type of content accessed can differ between social grades, with children from poorer families less likely to be using the educational advantages the internet can offer.

- Whilst it's true that media brands have more to compete with than ten years ago, there is no evidence that Gen Z have shorter attention spans, or that they are less able to concentrate than generations before them, despite this being a widely repeated myth.

- We shouldn't ignore that social media has, in some cases, had a positive impact on aspects of mental health, with a positive correlation between social media use and developing identities, self-expression and emotional support.

- However, there is also evidence that social media use has a negative relationship with a number of other aspects of mental health, particularly anxiety and depression - although cause and effect are unclear. The most thorough studies end up saying the evidence is worrying but inconclusive – which is understandable, given that pre-existing tendencies among young people and their exact use of social media are so varied and inter-related that unpicking a direct causal link is incredibly difficult.
- But these reviews also conclude that there is enough evidence to make it something that we should all – government, platforms, parents, educators – take actions to mitigate, and that more longitudinal and experimental studies are needed to inform what we can do. The small number of studies of this type that exist, do suggest that taking a break from social media does improve some mental health measures.
- Social media has also become a new platform for bullying, with a correlation between being bullied in school and time spent online, although there is no evidence bullying is on the rise as a result.
- Overall, happiness levels among young people have been broadly the same since the 90s, before they had access to the internet, or even increased in some countries, for example in the US. It's true that beneath these overall measures, some specific measures of wellbeing have decreased in some countries, including the UK – but the overall picture is of relative stability.

THE IMPLICATIONS AND THE FUTURE

A hierarchy of digital skills

For the most part, studies suggest that children from across the socio-economic spectrum generally have roughly even access to digital technology. But will this be a levelling force, meaning that in the future there will be less of a skills gap across groups?

CURRENTLY CHILDREN FROM LOWER INCOME FAMILIES ARE LESS LIKELY TO BE USING THE INTERNET FOR LEARNING AND THEY WILL, THEREFORE, BE LESS LIKELY TO DEVELOP CERTAIN SKILLS AS A RESULT

Unfortunately, evidence on the different uses that digital technologies are put to by different groups makes this seem idealistic, and as technology keeps moving, there will be new ways to fall behind, with the least advantaged in society the most likely to do so. With something so intrinsically linked with the ability to purchase new devices and pieces of kit, and with parental habits and expectations still so vital, it seems unlikely that we'll ever have complete balance across socio-economic groups.

Currently children from lower income families are less likely to be using the internet for learning and they will, therefore, be less likely to develop certain skills as a result. Whilst there is improved literacy in basic digital skills, schools and education authorities need to ensure that we continue to track the progress of children in a range of new ways. Developments in tech happen so quickly that what was advanced even five years ago is basic or even obsolete now.

To encourage digital inclusion we need to consistently encourage the educational aspect of the digital world, so that all young people can utilise the skills they learn. For decades technology has often been treated as an entertainment pastime, where use needs to be limited to do well in other aspects of life – social skills, education, outside play. We limit our children's access to technology – social networks, no phones until a certain age – because we feel it makes them safer. In fact, as we will see in other parts of this report, it is sometimes even considered by teachers and parents to harm young people's abilities to learn.

This is undoubtedly a risk, but depends entirely on the uses made of the technology. A simplistic reading of limiting use may just inhibit children's learning in these areas by limiting their access rather than encouraging them to learn. Should using technology and improving digital skills be just as important as reading at home?

THE COACHING CLOUD – CASE STUDY

A concept called the 'coaching cloud' is currently being explored, which would use machine learning to guide people as they work, and advise them on how to perform their task more effectively, by analysing data from a large sample of workers and identifying the best techniques.[65]

Like advances in the classroom, it would allow for personalised approaches to on-the-job learning. Gen Z are likely to be in the workforce to see these changes take place, and their propensity for using tech may make them more suited to adapting.

A changing societal dynamic with technology – for good and bad

The future of education is beginning to be realised already, and we will soon start to see much more personalisation through adaptive software which allows students to work at their own pace, as well as the growth of AI in tech, with robot tutors allowing more children to experience personal tuition than is available through human tutors.[66]

This shift from human to digital or artificial interaction brings all sorts of upsides and downsides. It is undoubtedly true that people can spend so much time switching their attention between different devices that they have less time to spend together – which may be impacting on all sorts of social interactions, even the most intimate. Indeed, last year, the BBC reported research showing a decline in sex life in the UK, and linked this to social media use, an extension of the decline seen with the rise of watching TV.[67] In 2013, the National Survey of Sexual Attitudes and Lifestyles (Natsal) found that British people between ages 16 and 44 had sex just under five times per month. This was a drop from the previous survey, released in 2000, where men were recorded to have sex 6.2 times a month, and women 6.3 times. In 2014 the Australian National Survey of Sexual Activity showed that people in heterosexual relationships were having sex on average around 1.4 times per week, down from closer to 1.8 times per week ten years earlier.

Digital world as a positive platform, not an exacerbation of offline worries

The online world as an extension of children's and teenagers' physical world is such a new phenomenon that we simply don't have enough data to fully grasp what kind of impact it will have on Generation Z. What is clear is that digital education must become a part of young people's upbringing – informally, but increasingly formally through curriculums worldwide, as we outline elsewhere in this section.

Brands also have a role in shaping and contributing positively to the digital world. As just about all brands are now heavily focused on digital communications, there is an opportunity for them to harness the positive impact social media can have, for example, encouraging self-expression and promoting positive body image. As we outline later in this section, some advertising encourages

THE BBC REPORTED RESEARCH SHOWING A DECLINE IN SEX LIFE IN THE UK, AND LINKED THIS TO SOCIAL MEDIA USE, AN EXTENSION OF THE DECLINE SEEN WITH THE RISE OF WATCHING TV

self-expression and creativity by including consumer-generated content in their campaigns, such as apps with games and quizzes which promote their products while providing entertainment, and campaigns like Disney's #shareyourears for Make-a-Wish.[68]

At the same time, brands should avoid contributing to negative aspects of the digital world: online adverts can be highly targeted and therefore can have a strong effect on what users think is 'normal'.[69] They must also ensure they are taking every precaution to avoid advertising next to harmful content, and monitor their platforms for any forms of cyber-bullying or inappropriate content.

The debate on whether and how the digital world should be held accountable has gained traction worldwide. How much, if at all, online platforms are responsible for the wellbeing of their users will become more and more important. Apparent watershed moments, such as the Cambridge Analytica scandal, will continue to put pressure on regulators, platforms and brands. There are particular questions being raised by those focused on young people's wellbeing: for example, the Children's Commissioner in the UK asks whether the algorithms and features that encourage long periods of use (auto-playing videos, rewards for 'streaks' of continuous engagement) should be viewed differently for content aimed at the young.

Only one trend seems certain – that the pace of change will continue to accelerate, meaning regulators will struggle to keep up, and there will be no settled endpoint or easy solution to controlling the negative and promoting the positive of our online lives.

COCA-COLA IN INDIA TAILORS CONTENT TO USERS WHO DON'T HAVE THE BANDWIDTH TO VIEW RICH DIGITAL CONTENT, BY SENDING THEM A TEXT INSTEAD

An exciting time for brand strategies

But it's not all about risks and downsides. Brands can and are realising the new opportunities brought by new technologies and a generation whose lives are so intertwined between online and offline. Advertisers and agencies need to continue to adapt creatively to different devices and viewing contexts, whilst anchoring each one into the same core idea and brand position.[70] For example, Coca-Cola in India tailors content to users who don't have the bandwidth to view rich digital content, by sending them a text instead.

Using geo-location and time of day, brands can deliver specific messages to their consumers, which will be more likely to stand out and be more useful to them. Focusing on shaping the results from online searches immediately after TV adverts have aired can show immediate returns from multi-screeners, and enable advertisers to connect them to extended content.

SONOS USING OFFLINE ADS TO DRIVE SEARCH BEHAVIOUR – CASE STUDY

Multi-screening can be seen by brands as an opportunity to enhance calls to action. An example of this was Sonos' 2015 ad campaign to encourage digital searches. People who searched 'Sonos reviews' after seeing their advertising were presented with a page full of five star reviews on Google.

There also needs to be a stronger focus on relevant content when optimising digital advertising. There is zero credible evidence that Gen Z has lower abilities in concentration or attention than previous generations. But it doesn't need this patronising 'goldfish children' trope to mean that immediate impact is more vital than ever. The changing communications context, with much greater competition for attention, means it is true that brands often only have a few seconds (often without sound) to make a connection.

THE CURRENT EVIDENCE

Access does not equal inclusion

Having grown up in a world saturated with internet access, Gen Z are connected to their friends, family and world events at the click of a button: 96% of 5-15 year olds in the UK have access to the internet at home, while 49% have their own tablet and 46% have their own smartphone.[71] Worldwide, youth (ages 15-24) are the most connected age group, with 71% online compared with 48% of the total population.[72]

This allows Gen Z the opportunity to carve different paths in how they use this technology, resulting in varying levels of digital skills. As technology becomes more crucial for education, employment and a wealth of daily tasks, there is a risk that some young people will be left behind. A suggested 300,000 15-24 year olds in the UK currently lack basic digital skills,[73] showing us that access doesn't equal ability online.

Overall in the UK, access to the internet is consistent across socio-economic groups within Gen Z. However, we see differences amongst those aged 5-15 from poorer households, who are less likely to have access to particular devices. Compared with all parents of 5-15 year olds, parents in these households are less likely to own a tablet (80% vs. 86%) or laptop (72% vs. 83%),[74] therefore reducing the use of these devices amongst their children.

Gen Z's personal ownership of devices is consistent across groups, with 42% of 5-15 year olds from poorer households owning their own smartphone, compared with 46% on average, while 48% own their own tablet versus 49% from better-off households.[75]

But the amount of time spent online is significantly different. On average, children aged 5-15 spent 15 hours and 18 minutes online in a typical week across 2017. But children

in better-off households, spent only 13 hours 42 minutes, compared with 17 hours by those in poorer households.[76]

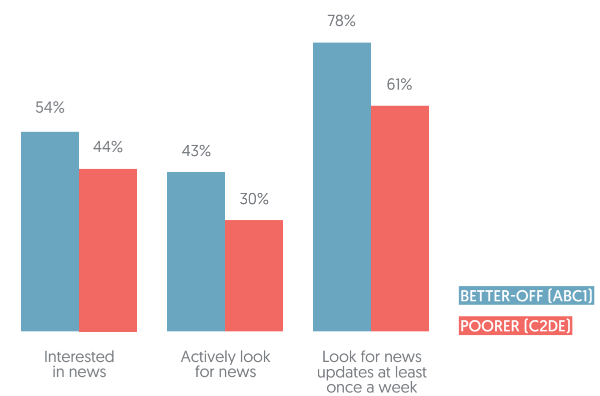
More than this, the nature of this time online is significantly different. For example, we know that Gen Z use YouTube to watch videos and clips covering a wealth of topics from gaming to music and their favourite TV shows. However, evidence suggests that those in better-off households are using it more for educational purposes, rather than simply having fun. For example, children aged 5-15 in better-off households are significantly more likely to watch 'how-to' videos/tutorials (48%) than those in poorer households (32%).

A similar trend is replicated amongst 12-15 year olds, with those from better-off households more likely than those in poorer households to say they actively look for news (43% vs. 30%) and to look for news updates at least once a week (78% vs. 61%).

With more news exposure, those children aged 12-15 in better-off households who go online are, therefore, more likely than those in poorer households to say they have heard of fake news (81% vs.

CHILDREN FROM BETTER-OFF FAMILIES ARE MORE LIKELY TO ENGAGE WITH THE NEWS

% agree



Source
Ofcom, Children and parents media use attitudes, 2017. Online survey with children aged 12-15.

Base
475 children aged 12-15, online, 2017

64%] and more likely to say they have seen something online or on social media that they thought was fake news [46% vs. 31%].

Taken together, what this suggests is that, while children in poorer households spend more time online, children in better-off households spend higher quality time, helping them to improve basic skills and prepare for the future.

Why might this be the case? As with so much to do with educational outcomes, the impact of familial abilities and habits seems key. For example, a recent study looking at digital skills amongst all adults highlighted that 91% of better-off adults claimed to have basic digital skills, compared with 62% of poorer adults. Fewer poorer adults claimed to be able to digitally manage information [84% vs. 96%], communicate [82% vs. 95%] or problem solve [73% vs. 90%], compared with those in higher social classes. Without this basic understanding themselves, parents will be unable to pass these skills onto their children.

A distracted generation?

A popular claim in listicles and articles about Gen Z [and Millennials] is that because of the technological environment they've grown up in this generation have a reduced attention span, compared with generations before them. This is picked up and re-hashed by advice columns for marketing companies,[77] and even accounts from teachers.[78] Some more specifically claim the exact amount of time that Gen Z can hold their attention: apparently eight seconds, compared with the 12 seconds of generations before them. Some others even make the claim that this decrease has happened since the generation before them – Millennials.[79]

But there doesn't seem to be any solid evidence that Gen Z have shorter attention spans than Millennials, in fact the exact same statistics have been used about Millennials in the past. As our own report on Millennial Myths from 2017 highlighted, the idea that attention spans are getting shorter is not something that has been measured and quantified.[80] Attention is not single-faceted, it's a complicated brain function with different domains and types.

AS OUR OWN REPORT ON MILLENNIAL MYTHS FROM LAST YEAR HIGHLIGHTED, THE IDEA THAT ATTENTION SPANS ARE GETTING SHORTER IS NOT SOMETHING THAT HAS BEEN MEASURED AND QUANTIFIED

So, where does this claim come from? The claim often links back to an article littered with hyperlinks to other articles and studies which makes it difficult to find the clear source of the claim – and a hyperlink trail through other sets of articles and listicles ends at a study by Microsoft Canada's Consumer Insights team.[81] As discussed in our report on Millennials,[82] this study used a combination of survey data and neuroscience to conclude that Canadians had a lower attention span in 2012. According to this research, the top factors contributing to a lowered attention span are media consumption, social media usage, technology adoption rate and multi-screening.

However, as well as talking about all Canadians [rather than Gen Z specifically], the study had no longitudinal data to support a claim attention spans are lower now than previously, let alone that they are lower in one generation compared to another. Additionally, the measure on attention spans was based on self-reporting and the key statistic picked up in the headlines – that attention spans are now eight seconds, compared to 12 seconds in 2000 – is not an original finding of this study. This stat is in fact from another website that doesn't cite its source.[83]

So why, when there is no solid evidence Gen Z have lower attention spans, are clever people so quick to pick up this claim and re-hash it as truth?

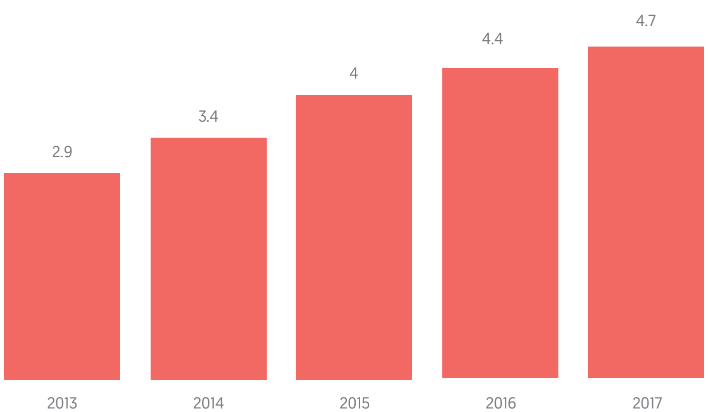
It's because the claim seems so plausible. Technology is advancing quickly and the fact that young people are now spending more time multi-screening (research shows that people are multi-screening more: adults aged 15+ in the UK spend 41 minutes a day watching TV while using the internet, up from 17 minutes in 2011[84]) and looking at screens than generations before them lends to the idea that attention is divided.

Some second-hand evidence does indeed suggest a perceptions shift. A Pew study found that 87% of US teachers think that today's digital technologies are creating an "easily distracted generation with short attention spans".[85] However, this has a hint of 'rosy retrospection' about it, where we believe the past was better than it was – and kids (including ourselves) were always well behaved and focused.

However, whatever the objective reality, in the same study three quarters of teachers agreed that the impact of today's digital environment on students' research habits and skills are mostly positive.[86]

WE HAVE MORE CONNECTED DEVICES IN OUR HOMES THAN EVER BEFORE

Average number of connected devices in UK households



Source
Ipsos MORI Tech Tracker

Base
c.1000 people aged 16 + per wave

In addition to those who teach them, multi-screening amongst young people is a key concern for brands. The average number of connected devices in UK households is increasing, meaning children have access to a range of devices that are often accessed at the same time. The abundance of choice in technology and media means we've moved away from the 20th century 'appointment to view TV' and desktop internet access, to 'always on', anytime, anywhere access, providing more content and information than could ever be consumed. This means the competition amongst brands for attention is fierce. But the answer is good, effectively executed content, not a blame game about the attention spans of young people.

This can be good news for brands, who now have more opportunities and contexts to get their content seen by their target audience. Also, while people are multi-screening, they are more likely to stay in the same room during TV ads, and watch the ads 'almost by accident', and are no less likely to recall TV ads than those who are not multi-screening.[87]

The dark side of tech

Mental health is an increasingly talked about issue, and is becoming firmly embedded in national healthcare agendas – although many would argue that it's still not given the focus

THERE IS A CLEAR ASSOCIATION WITH TIME SPENT ONLINE AND SOME SYMPTOMS OF MENTAL ILL-HEALTH

% of UK children with mental health symptoms

Source
Measuring National Wellbeing: Insights into children's mental health and wellbeing, ONS, 2015

Base
Children in the UK aged 10-15 years

27%

of children who spend 3+ hrs on social networking sites on a typical school day

12%

of children who spend no time on social networking sites on a typical school day

AN OVERALL READING OF THE MOST AUTHORITATIVE REVIEWS SUGGESTS THAT MORE TEENAGERS TODAY SUFFER FROM SEVERE ANXIETY AND DEPRESSION, AND THAT SOCIAL MEDIA MAY BE A CONTRIBUTING FACTOR

and resources it deserves. More people are being diagnosed with mental health problems than previous decades, though, as many have pointed out, this may not be as a result in a growth of actual prevalence, and instead could in part be due to the increased awareness and de-stigmatisation of the issue.[88]

A main point of focus within these discussions is about the effect that hyper-immersion in tech is having on the mental health of younger generations. There is a clear association between time spent online and some symptoms of mental-ill health – but it is less clear whether this relationship is causal.

For example, more than a quarter (27%) of children in the UK up to 15 years old who spend three or more hours on social networking sites on a typical school day have symptoms of mental ill-health, compared with just 12% for those who spend no time on a school day.[89] It's not just time spent that is associated, it's the type of use. For example, a US study among young adults from 2016 showed that the probability of depression was three times higher among those who were active on seven to 11 platforms, compared with those on zero to two platforms – even after controlling for time spent.

An overall reading of the most authoritative reviews suggests that more teenagers today suffer from severe anxiety and depression, and that social media may be a contributing factor – but that causal relationships are incredibly difficult to prove.[90]

This is partly because there is a very real possibility that social media and other digital tools are being used as a coping mechanism for those who suffer issues with their mental health, rather than these tools being a causal factor. Given that part of the explanation for the general rise in mental illness diagnoses is greater awareness and openness, it stands to reason that those more often online are more likely to pick up on these trends.

But one of the most respected academics on understanding young people, Jean Twenge from San Diego State University, notes the very strong correlation over time between the rise in smartphone use and the rise in depression in the US and concludes: "The use of social media and smartphones look culpable for the increase in teen mental-health issues. It's enough for an arrest — and as we get more data, it might be enough for a conviction." This is echoed in the small number of truly longitudinal and experimental studies that have actively reduced social media use among participants, and seen an improvement in mental health as a result.[91]

But in this, of course, we shouldn't forget that people are incredibly varied, and the impact of social media will be very different for different people. Social media has many potential positive influences on young people's lives, such as increasing social connections, helping with homework and enabling teenagers to develop their identities and share creative projects. There is data which even shows positive effects of social media on mental health. For example, YouTube use can have

SOCIAL MEDIA HAS MANY POTENTIAL POSITIVE INFLUENCES ON YOUNG PEOPLE'S LIVES, SUCH AS INCREASING SOCIAL CONNECTIONS, HELPING WITH HOMEWORK AND ENABLING TEENAGERS TO DEVELOP THEIR IDENTITIES AND SHARE CREATIVE PROJECTS a positive impact on self-expression, loneliness, depression and emotional support. Instagram also scored strongly on self-expression, self-identity and emotional support. [92]

And the technology has the potential to help with those who are struggling. Two very interesting experiments by Microsoft and Harvard University have shown how analysis of social media postings can very accurately identify those at risk of mental health issues before they present.[93]

Overall then, while there are conflicting results of the impact of social media use across the spectrum of mental health, the overarching feeling is that heavy use of social media and positive mental health do not go hand-in-hand, and while the causal path is very difficult to prove, active intervention to emphasise the positive and mitigate the negative is a key priority for the welfare of young people.[94]

Another way to look at the impact of online exposure on well-being is to look at specific intermediate outcomes. There are several of these areas where it is claimed technology and digital connection are affecting the emotional and mental health of children and teenagers today, including cyber-bullying, exposure to inappropriate content, and the pressure to look popular and be online all the time.

Cyber-bullying

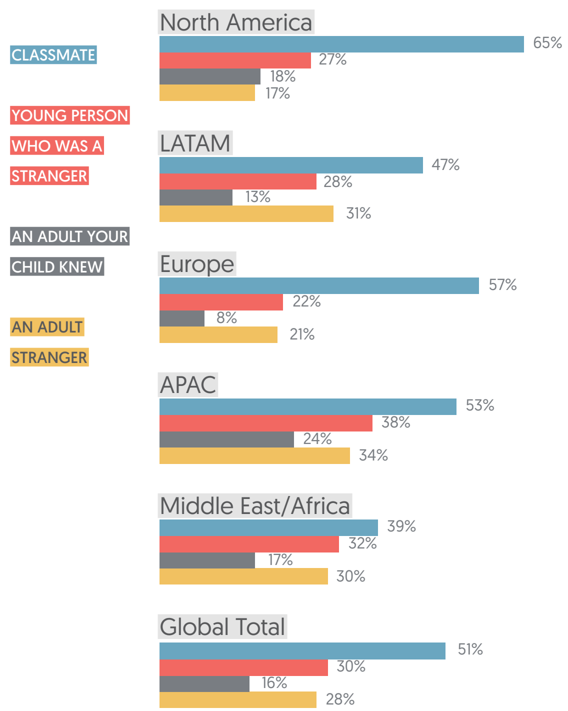
Bullying has always been an issue among children and teenagers, but the rise of social media has created a new platform for this hurtful behaviour, which unlike bullying in school, does not necessarily stop when the victims are at home. In 2017, 12% of UK 12-15 year olds reported having experienced online bullying.[xx]

There is also a positive correlation between being bullied in school and time spent online: global OECD data on school students shows that 17.8% of extreme internet users (those who spend more than two hours online on a typical weekday) report that "other students spread nasty rumours about me", while among moderate users (1-2hrs online) the figure is only 6.7%.[95] Again, cause and effect are difficult to unpick here.

However, it is not clear that bullying has actually increased overall with the rise of cyber-bullying: in-person bullying is still higher than online, at 16% versus 8% among UK 9-16 year olds, and online bullying is reported more in countries where there are already higher levels of bullying overall.

CHILDREN ARE MORE LIKELY TO BE BULLIED ONLINE BY SOMEONE THEY KNOW

% identify of suspected cyber-bully



Source
Ipsos Global Advisor

Base
Parent/ guardian of chld believed to be cyberbullied, global, =2929, online

In addition, a recent global study by Ipsos into cyberbullying found that most cyberbullying is conducted by someone the child already knows, and a child is most likely to be bullied online by a classmate.[96] This implies that cyberbullying is at least partly a new outlet for the issue, rather than being caused by the rise of tech.

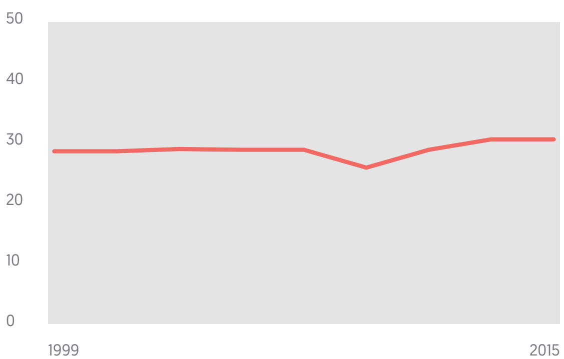
Gen Z and happiness

The overall picture of the influence of tech on young people's mental health is mixed. But is that reflected in broader measures of subjective well-being and happiness? Again the picture is nuanced, but the overall sense is that, actually, kids as a whole are about as happy as they were in the past.

Looking at the generations when they were the same age, the proportion of 14-17 year olds in the US reporting some level of feeling consistently sad or hopeless has remained fairly constant at around 30% since the 90s.[97]

HAPPINESS (OR SADNESS) HAS REMAINED FAIRLY CONSTANT

% of US 14-17 year olds each year who reported feeling sad or hopeless each year



Source
High School Youth Risk Behaviour Survey 1999-2015

Base
US 14-17 year olds

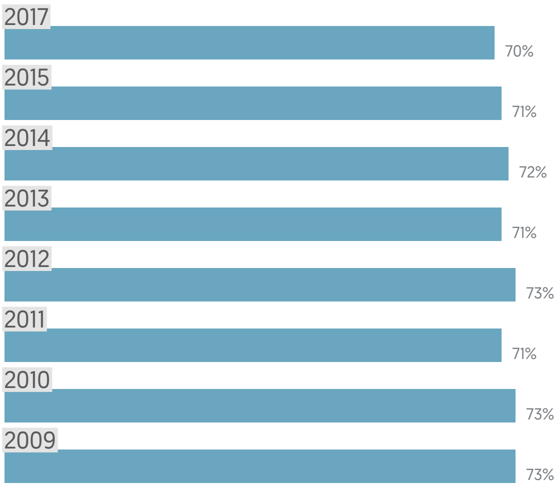
For two consecutive decades (1990-1999 and 2000-2009) suicide rates in 10-14 year olds across 81 countries have, on average, decreased slightly among boys, from 1.61/100,000 to 1.52, but increased minorly among girls from 0.85 to 0.94. The changes varied more in some regions than others.[98]

Comparing Gen Z in the UK with other generations at similar ages on more general measures of wellbeing shows a mixed picture depending on which measure is compared: on happiness with friends and appearance, Gen Z is at similar levels to older generations, but on family and home, they are less happy.[99]

In the UK, overall happiness and confidence is very slightly down from previous year. However, if we look at specific areas like emotional health, there has been a more significant drop from 67% to 61% happiness with emotional health between 2008 and 2017.

HAPPINESS IS SLIGHTLY DOWN ON PREVIOUS YEARS

Youth Index scores (both happiness and confidence indexes combined)



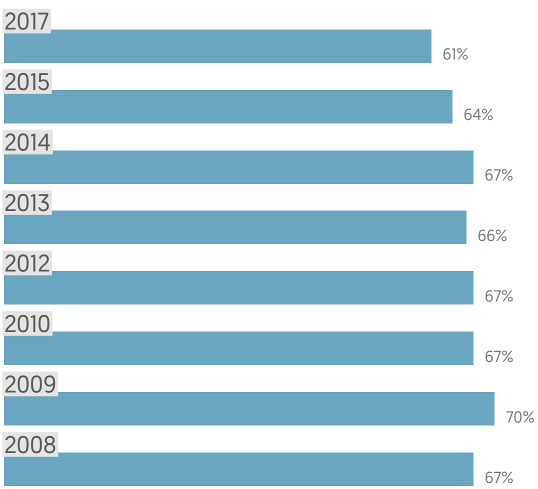
Source
Prince's Trust Youth Index 2017

Base
2,515 UK 16-15 year olds

However, research in the US suggests adolescents (13-18) are more satisfied than previous generations with their overall life, and across 14 domains of life satisfaction, including satisfaction with their parents, themselves, their education, and the safety of their neighbourhood.[100] A more recent study by the same authors also confirms this: when asked the question between 1972 and 2014 "Would you say that you are very happy, pretty happy, or not too happy?", shows teens are now happier than they used to be.[101]

... WITH A MORE SIGNIFICANT DROP IN HAPPINESS WITH EMOTIONAL HEALTH

Emotional health happiness index among UK 16-25 year olds



Source
Prince's Trust Youth Index 2017

Base
2,215 UK 16-25 year olds

FINAL THOUGHTS ...

Overall, as the President of The Royal College of Psychiatrists in the UK has said, it's unfair to blame social media alone for the complex reasons young people are suffering from mental illness. The direction of cause and effect and the myriad mediators and moderators all make this difficult to conclude, without more evidence. Humans are resilient, and adapt to new lifestyles quickly, with the ubiquity of technology being just one of the major shifts we've seen in recent years. And as we've emphasised throughout this report, Gen Z is a very diverse generation, and (as with people in general) will react very differently to the same downsides and benefits of technology.

However, this doesn't mean we should be complacent about a changing environment – and should recognise the significant risks associated with being 'always on', and take active steps to mitigate them. The Royal Society for Public Health in the UK emphasises how this could, and should, be approached in content and platforms targeted at young people – heavy use warning pop-up messages, for example.[102]

But we should also not forget the positives. Just as with TV, there are many different experiences to be gained from online technology, depending how people use it: some studies show that passive use may reduce subjective well-being, while active use can enhance it.[103]

PRIVATE / PUBLIC

IN BRIEF

GEN Z AND PRIVACY

- The accelerating pace of change in technology makes it hard to compare generational attitudes to data privacy on a like-for-like basis: it's impossible to strip out age effects by comparing current young people with previous generations of young people, because the context has changed so much.

- But it does seem as though Gen Z are slightly less concerned about their online privacy than older groups: globally, 65% of Gen Z report being concerned about what data companies are collecting about them when they go online, compared with 73% of Millennials, 77% of Gen X and 76% of Baby Boomers.

- Mirroring this, younger people are slightly happier than older groups to share data with companies in return for the personalised services and products they have grown used to. In emerging markets, 56% of 16-24 year olds are happy to do this, compared with 51% of 25-34 year olds, and in established markets, 45% 16-24 year olds are happy to do this, compared with 42% of 25-34 year olds.

- But these differences are not huge (as you will sometimes see claimed), and they will be due to a combination of effects, including the fact that the type of activities younger groups mostly engage in online may involve less sensitive (for example, financial) data, coupled with a somewhat greater understanding of how to protect themselves.

- For example, 18-29 year olds in the US are more likely than older adults to say they have paid attention to privacy issues, and 49% of them say they have taken action by disabling cookies on their browser compared with 41% of 30-49 year olds.
- However, Gen Z are actually slightly more concerned than older generations about what is done with information that governments collect about them: 64% of Gen Z are worried, compared with 57% of Baby Boomers.

THE IMPLICATIONS AND THE FUTURE

Balancing data privacy and the opportunities of data analytics

There is an expectation among the youngest generation of consumers that brands should be able to anticipate their needs and provide useful suggestions to make their shopping and service experiences more personalised and efficient.

However, brands that succeed in this space also need to be transparent about their practices. Consumers should easily understand a) what data is being collected, b) for what purpose it will be used, and c) what benefit it will yield them. In the event of a data breach, this transparency should extend to swift admissions and rectification. Of course, this applies to all generations, but Gen Z in particular have grown up with a sense of the value of their data, reinforced by events and legislation: a concept that can seem quite alien to older groups will be native to this cohort.

The future of data regulation – and data literacy

There is increasing pressure on governments to update their regulations regarding the data privacy of their citizens, which we recently saw being actioned in the EU, with the new General Data Protection Regulation (GDPR) coming into effect in May 2018. New regulations and other interventions from governments seem set to continue to grow: very public shocks like the unauthorised use of the records of 87 million Facebook users by political analysts Cambridge Analytica seem highly unlikely to be the last or only examples of perceived breaches of trust.

But there is only so much that can be achieved through regulation, given the variety of situations and the accelerating speed of technology. They therefore must also be coupled with a solid education for young people on the importance of data privacy, to ensure that tech-enabled children, who are somewhat more relaxed about sharing their data, are safe online. This is part of a growing movement, where broader digital literacy is essential for

TEACHING INTERNET AND DATA LITERACY IN SCHOOLS

In October 2017, Italy rolled out a pilot programme across 8,000 schools for children to increase online news literacy. The programme is mainly aimed at teaching students to understand whether news articles are reliable, but also includes teaching them how to understand how their 'likes' on Facebook are monetised.

In the UK, the Information Commissioner has given guidance for schools on lesson plans to incorporate data privacy in their curriculum – though as of yet, there are only a few cases where it has been taught.[104]

In June 2017, several educational organisations in Europe organised a roundtable discussion around GDPR and children's rights, and suggested that children should be formally taught about data protection by a certain age.[105]

both individuals and society, as seen in trends like Italy piloting an internet news literacy programme as part of its school curriculum.[106]

More opportunities for brands to connect with Gen Z

But this isn't just about brands managing perceived threats and ensuring they don't betray trust: there are opportunities for engagement, if done well. Brands are starting to tap into Gen Z's comfort with sharing particular data online by encouraging customers to gear their self-expression to support campaigns – for example, by incentivising them to share photos of how they use the brand's products, in return for being featured on the brand's website and social platforms.

Brands who have successfully run such user-generated content campaigns include Forever 21, Madwell and Disney. Forever 21 asked customers to upload their favourite summer outfits from the brand, which, as well as giving brand wearers the chance to show off their style, also successfully advertised to other teens – a group that tends to value real, everyday people in advertising.[107]

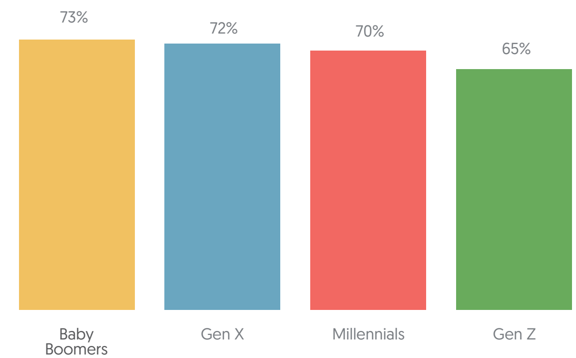
Disney, meanwhile, combined Gen Z's love of sharing on social platforms with their enthusiasm for charitable contributions, by donating $5 to Make-a-Wish for every photo uploaded by users wearing Micky Mouse ears and using the hashtag '#shareyourears'. The campaign raised $1million, which Disney doubled due to the "overwhelming outpouring of support".[108]

THE EVIDENCE

More than any other area, exploring attitudes and behaviour around technology across generations means we have to make do with snapshots: the technology and context change too quickly to be able to look back and measure Gen Z against Millennials when they were the same age. While this means we need to be particularly careful in ascribing differences to cohort characteristics (as opposed to Gen Z just being younger), this can still provide some useful clues to the direction they're going.

GEN Z SLIGHTLY LESS CONCERNED ABOUT ONLINE DATA COLLECTED BY COMPANIES

% concerned about how information collected about me when I go online is being used by companies



Source
Ipsos Global Trends Survey

Base
17,180 adults across 22 countries, online, 12 Sep-11 Oct 2016

For example, Gen Z do report feeling less concerned than older age groups when it comes to what data companies are collecting about them when they go online: globally, 65% of Gen Z report feeling concerned, compared with 70% of Millennials, 72% of Gen X and 73% of Baby Boomers.[109]

However, this could be a very clear case of an age effect: younger groups will be doing different things online, where there is less perceived risk from data profiling, or they have just considered the risks less as yet – and there are indications that this might be the case from a more detailed look within Gen Z. This shows that 11-16s in particular are far less concerned than the older members of Gen Z: only 37% of the youngest age group are concerned about companies collecting their data, compared with 72% of 17-22s.[110]

However, there is a much clearer message when it comes to government collecting online data. When we look at Gen Z overall, we can see they are actually more concerned than some other generations: 64% of Gen Z are worried, compared with 60% of Millennials and 57% of Baby Boomers – although Gen X have the highest level of concern, at 65%.[111]

Teens do take privacy settings seriously

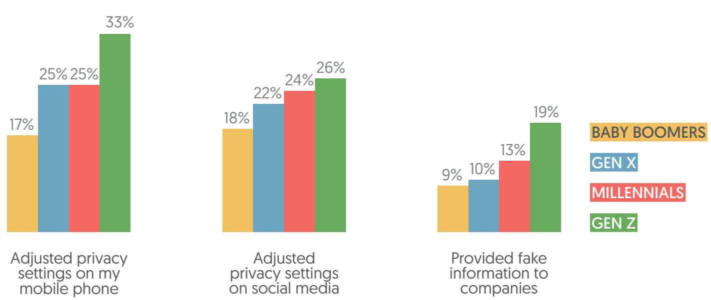
Gen Z's immersion in technology means they are familiar with how to use it, and this seems to include a greater understanding of how to set their privacy levels on social accounts, and other online platforms, so that they only share their information and activities how they want to.[112]

For example, 18-29 year olds in the US are more likely than older adults to say they have paid attention to privacy issues, and 49% say they have taken action by disabling cookies on their browser, compared with 41% of 30-49 year olds. Similarly, 41% of 18-29 year olds have used a temporary username or email address, compared with 25% of 30-49 year olds.[113]

Gen Z in the US are also more likely than older generations to have provided fake information to companies online, as well as other forms of protective action: 33% of Gen Z have adjusted the privacy settings on their phone, compared with

YOUNGER CONSUMERS TAKE MORE PROTECTIVE ACTION

% of US respondents who agreed that they have taken action in last 12 months "due to concerns over data privacy"



Source
Deloitte/SSI 2016 consumer survey

Base
Gen Z - 301, Millennials - 558, Gen X - 306, Baby Boomers - 374

AS DOUBTLESS WAS THE CASE FOR PREVIOUS GENERATIONS OF YOUNG, JUST IN DIFFERENT WAYS, GEN Z CAN BE SECRETIVE AND JUST PLAIN DECEPTIVE WITH THEIR PARENTS TOO

just 25% of Millennials and Gen X, while 19% have provided fake information to companies, compared with 13% of Millennials.[114]

Gen Z also update their private social channels, including Snapchat, more often than their public 'broadcast' channels, such as Twitter and Facebook. While we cannot ascribe this wholly to keeping a keener eye on privacy (rather than the different appeals of the platforms), the differences are stark: 43% of Gen Z update on their private social channels every day, compared with just 21% on public channels, and 55% agree with the statement "I am more likely to share content via a messaging app than on my newsfeed".[115] This is more pronounced among Gen Z than other generations: 18-24 year olds in the US use all channels except Facebook more than older age groups, but the one they use more than any other is the private channel of Snapchat: 78% of Gen Z use this, compared with 54% of 25-29 year olds, while it is lower still for older groups.[116] In Australia, of 8-17 year olds who use social media, 61% have their main account as private, and 21% as partially private.[117]

As doubtless was the case for previous generations of young, just in different ways, they can be secretive and just plain deceptive with their parents too: 60% of US internet users aged 13-17 have created an online account that they believe their parents are unaware of. And they're often right: only 28% of parents surveyed suspect their teens have secret accounts.[118]

THERE IS NO INDICATION THAT GEN Z ARE PARTICULARLY LESS LIKELY TO DELUDE THEMSELVES THAT THEY'RE MORE ON TOP OF PRIVACY THAN THEY ACTUALLY ARE

It is not true, either, that Gen Z don't worry about the consequences of a data breach: 36% of US 13-17 year olds are very concerned about having a photo or video shared that they wanted to keep private, and 39% about someone sharing personal information about them online. These are in line with the proportion of the concerns their parents hold for them, which are 34% and 42% respectively.[119]

It's also worth remembering that not all adults are necessarily as careful as they need to be when it comes to data security: a full third of UK adults (16+) who buy things online don't check to see if the site looks secure (padlock symbol or https) first.[120] More than this, people are often woefully unaware of how they actually act, compared with how they report they act: an Ipsos survey of adults in 20 countries showed that despite nearly half of them stating that they were willing to pay for improved data privacy, only a quarter of the same people in the same survey said they had taken basic steps to strengthen their browser's privacy settings.

Also, although a third of people insist that they always read terms and conditions or user agreements on websites, server-side surveys suggest that the real number is more like 1% – which is unsurprising given that some of these agreements can be over 30,000 words long, i.e. longer than Hamlet. One of many illustrative example of this is the 88% of people who ticked 'agree' to computer game retailer Gamestation, after the company changed their terms to include a clause giving the company the 'non-transferable option to claim now and forever more your immortal soul'.[121] There is no indication that Gen Z are particularly less likely to delude themselves that they're more on top of privacy than they actually are.

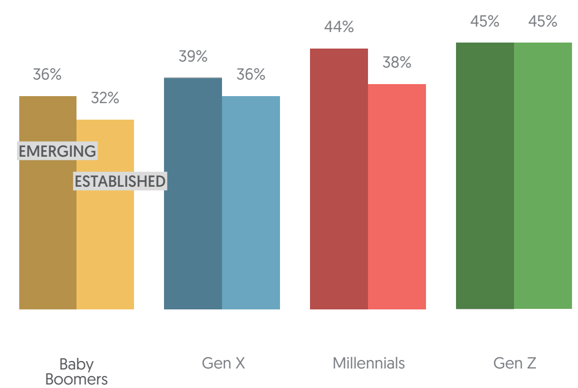
Personalisation is expected

It's a consistent picture of important but relatively small differences on attitudes to personalisation. Younger people are slightly happier than older groups to share data with companies in return for the personalised services and products they have grown used to. In emerging markets, 56% of 16-24 year olds are happy to do this, compared with 51% of 25-34 year olds, and in established markets, 45% 16-24 year olds are happy to do this, compared with 42% of 25-34 year olds.[122]

They are also slightly more trusting of retailers to use their data appropriately compared with other generations. In established markets, 45% of Gen Z trust retailers, compared with 38% of Millennials, 36% of Gen X, and 32% of Baby Boomers. They are not so far ahead of older age groups in emerging markets,

GEN Z ARE SLIGHTLY MORE TRUSTING RETAILERS WILL USE THEIR DATA CORRECTLY

% trusting retailers selling goods and services to use personal information correctly



Source
Ipsos Global Trends Survey

Base
17,180 adults aged 16+, across 22 countries, online, 12 Sep - 11 Oct 2016

perhaps reflecting a difference in data privacy concerns regionally: 44% of Millennials, 39% Gen X, and 36% of Baby Boomers.[123]

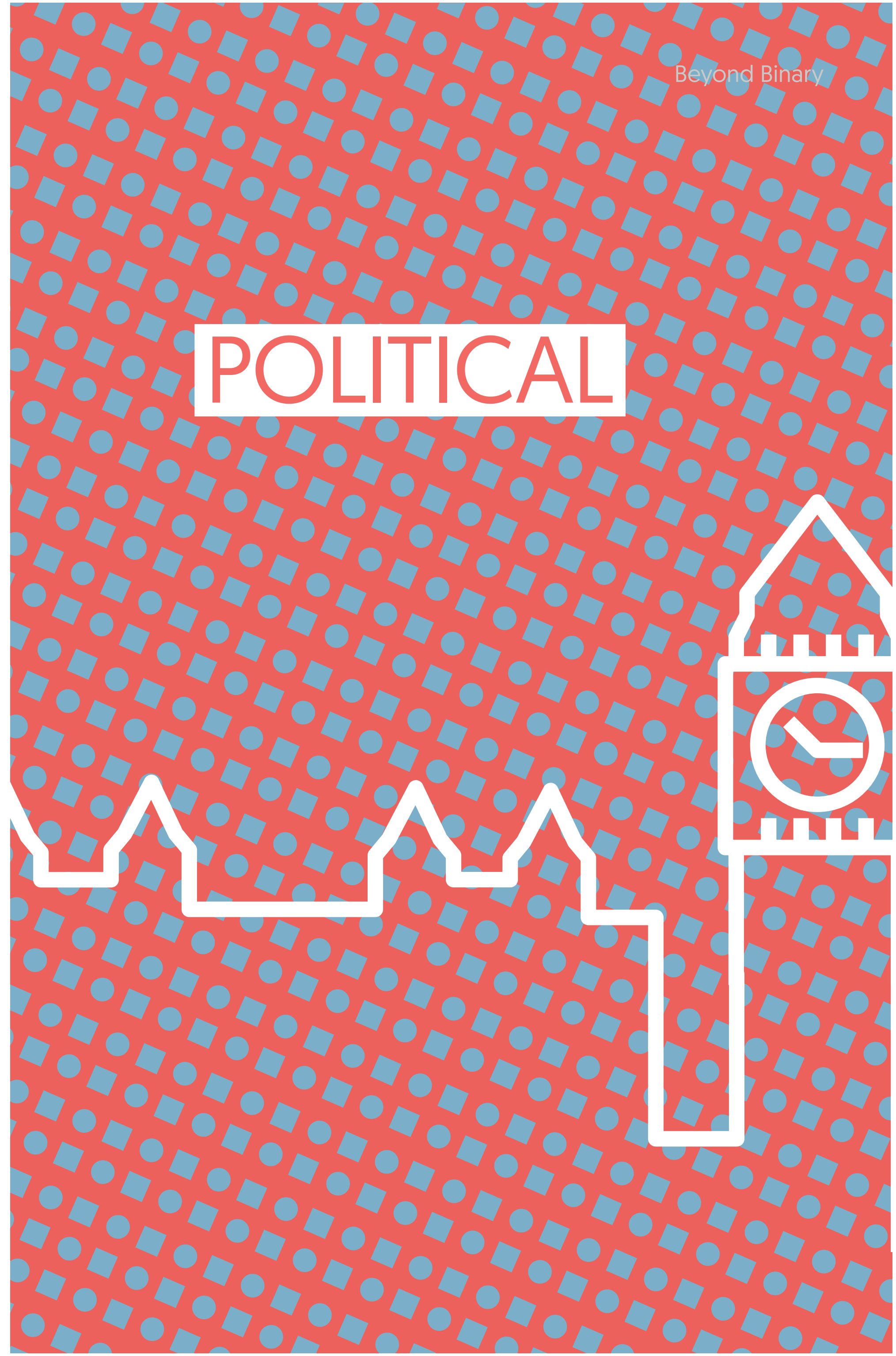
However, Gen Z do seem more attracted to the new approaches to speed and tailoring of services that maybe seem intrusive to others: for example, 39% of 16-22 year olds in US would be more loyal to a brand that provides one-hour drone delivery, compared with just 22% of Millennials (23-37 year olds).[124]

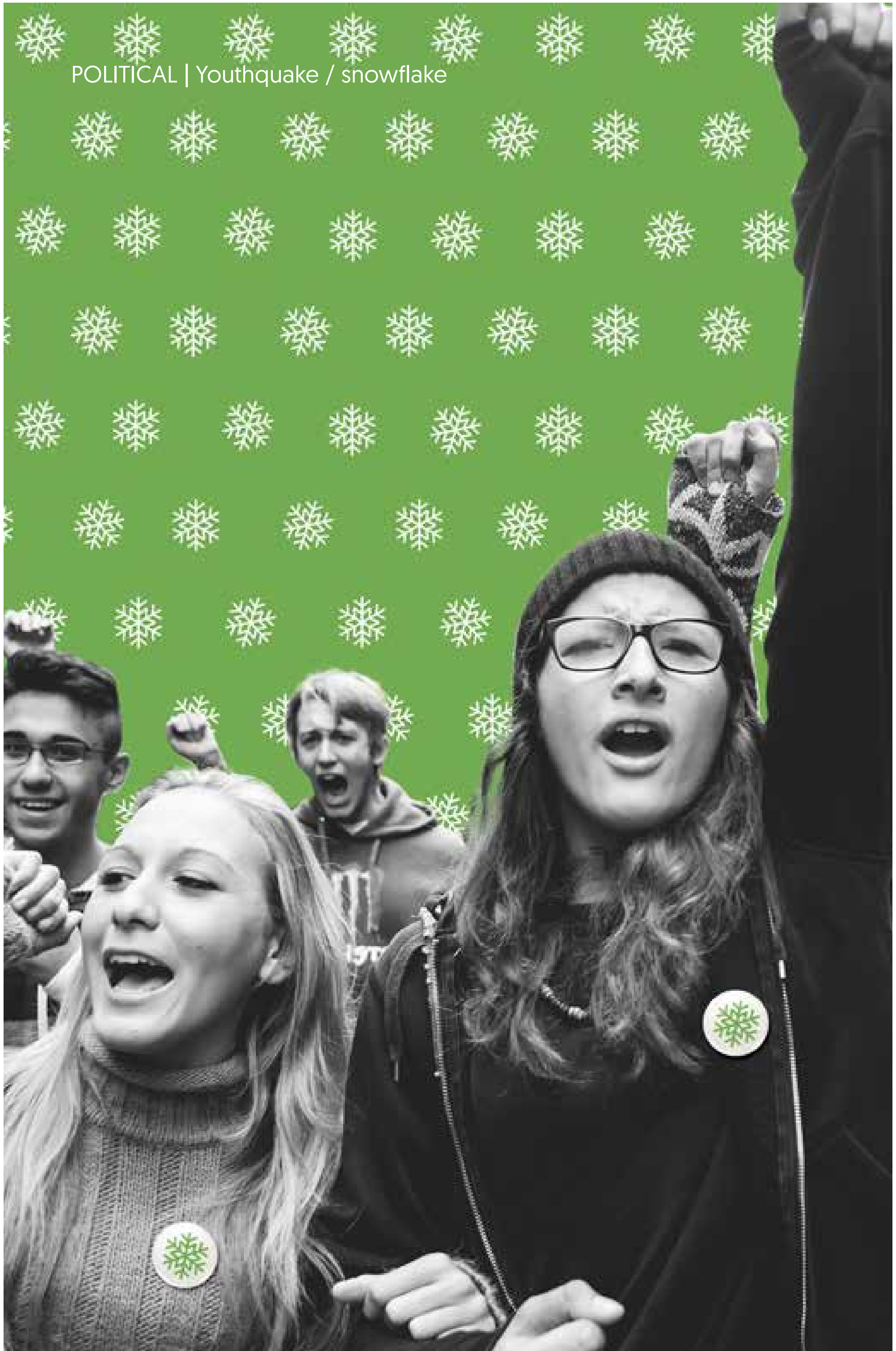
FINAL THOUGHTS ...

The constantly shifting data landscape and the way this changes how generations view the private or public nature of their online identities is one of the key drivers that will shape this cohort of young. Ironically, the effects are also some of the hardest to unpick – precisely because it is changing so quickly.

But the available data makes clear that we're seeing neither a headlong rush into a completely shared, public life – nor a retreat to complete privacy and universal encryption. The picture is of a generation that is a bit more open to the benefits of being open, a bit more savvy about keeping things private when they want to, and a bit more aware of the value of their own data. This means that the opportunity to engage is still very much there and growing, but only for those who do it well and provide benefits that people value, rather than convenience for businesses or governments.

And as with all generations of young before them, the truly new and apparently outlandish, such as drone delivery, hold significantly less fear for this group, and they'll continue to help normalise these innovations for the rest of us, if they think they're of value.





YOUTHQUAKE / SNOWFLAKE

IN BRIEF

GEN Z AND ACTIVISM

- Generation Z aren't looking like they'll be heading to the ballot box any more than the cohorts of young people before them. In Britain, 71% of 14-16 year olds say it's likely they will vote in a general election – the same proportion of Millennials who said the same thing in 2005.

- Other types of political activism haven't seen a boost either. School children don't see themselves engaging with MPs as much, but this may be more to do with how they view MPs specifically, rather than a mass political inertia among the young.

- Online political engagement is looking more important – three in ten British teenagers think it likely they will contribute to a discussion or campaign on social media.

- European Gen Z are pretty left-leaning, particularly in Spain where 15-21 year olds are six times as likely to identify as left wing than right wing.

- Some political divides also seem to be becoming more generational. For example in the UK, on issues like immigration, where Generation Z are half as likely as Baby Boomers to think immigration is a major concern (16% compared to 33%).

- In the US, half of adult Generation Z (49%) see themselves as close to a political party – actually slightly more than Millennials in 2001. This halts the pattern of cohort-on-cohort decline in generational party identification.
- There has been a stark increase in school-aged social action. Three in ten (29%) 14-16 year olds in the US are regularly active in their neighbourhood, community or an ethnic organisation, compared with just one in ten (10%) in 2005.
- Gen Z seem to be more likely to value ethical purchasing. A quarter of teenagers say they have avoided certain products because of the conditions under which they were produced or what they are made from (26%) – an increase from 19% of Millennials in 2005.

THE IMPLICATIONS AND THE FUTURE

Digital democracy and i-voting

So, teenagers are not trailblazing on traditional channels of political involvement, but neither are they selfishly doing nothing. They are actually pretty similar to previous generations of young people –

THREE IN TEN (29%) 14-16 YEAR OLDS ARE REGULARLY ACTIVE IN THEIR NEIGHBOURHOOD, COMMUNITY OR AN ETHNIC ORGANISATION, COMPARED WITH JUST ONE IN TEN (10%) IN 2005

THE FUTURE OF DEMOCRACY?

In 2007, Estonia became the first country in the world to use electronic voting in parliamentary elections. The so-called ‘i-voting’ system is part of the digital revolution of the Estonian governance system – which offers an ‘e-Court’, where citizens can file a claim into a 24/7 portal and have their first hearing confirmed within the hour. Estonians also have an e-identity which unlocks all online services to Estonian citizens and can be used for travelling in the EU, medical care and digitally signing documents.

With the i-vote system, Estonian citizens all have the option to vote electronically by logging into a computer with their e-identities. Voters remain anonymous as details are removed before the authorities count the vote.

For those who can never make up their mind, the i-vote system allows people to re-cast an i-vote as many times as they want – the final vote cast will be the one that’s counted. And should voters end up wanting to cast their vote in person, a polling station vote will always trump an electronic one.

The Estonian government estimates that 30% of citizens used i-vote in the last election and that, in total, 11,000 working days were saved because of efficiencies introduced by the i-vote system.

which means that if we want to increase engagement, we may be better off focusing on shifting the context for participation. There are already calls for the democratic process to catch up with the way in which younger generations interact with society. Many companies and social enterprises have developed software for governments to help engage with citizens more efficiently online. For example, the Open Town Hall app allows local governments to interact through surveys, online forums and meetings in a more participative way that supplements public hearings and representative democracy – the more traditional ways for local governments to engage with citizens.[125]

Whether internet voting will be introduced in national elections is more controversial, particularly in the aftermath of the Cambridge Analytica scandal and scares about foreign interference in elections, where concerns around data security and use are high. But, already some countries have introduced or piloted some form of online voting into election processes including Belgium and Switzerland. Estonia, however, is the first country who has permanently introduced internet voting, or 'i-voting' in their electoral processes.[126] Estonia propounds that their system has reduced costs and increased voter turnout. But, many countries (such as the UK) are keeping the door open to electronic voting, but not yet embracing it.[127] There are still concerns around security and fears that electronic options will devalue the symbolic, almost ritualistic gesture of voting. Yet, with the combination of no generational boost in engagement in traditional politics, with lightning-fast technological advancement, will internet voting become just too obvious to avoid?

Volunteering as a social antidote

The seemingly unwavering levels of young people participating in volunteering is a cheering prospect – and the indication that volunteering is more ingrained into the psyche of school-age Generation Z is even more heartening. Not only is volunteering good in itself, but there is evidence that it could help to counteract some of the issues young people struggle with in the modern age. As highlighted in the Technology section, Gen Z are more likely to be depressed and less likely to interact with others face-to-face. Volunteering has been linked to alleviating loneliness and depression – improving social connection for a generation who are screen-first. For example, an evaluation of the National Citizens Service (NCS), a voluntary development programme for 15-17 year olds in the UK, indicates involvement in their three or four week plan can lead to long-term improvements to social mobility and social engagement.[128]

Future of charity: innovative and integrated

The changing nature of corporate social responsibility means purpose is more integrated into the core of startups – Tesla, Toms and Patagonia built sustainability into their DNA from scratch. This could mean that a working population in the 2030s will have a much more conjoined view of employment and organisations' social impact.

Generally, Generation Z will be likely to contribute to society through technological innovation. Already there are countless examples of digital social action, such as 'Be my eyes' – a social network pairing blind users with sighted ones; 'GoFundMe' – the famous personal fundraising website to raise money for a life event; 'Instead' – an app that spells out trade-offs between spending money on small things and instead donating to charitable causes. Some of these have been developed by larger tech companies like Google, but many are by smaller startups. What is clear is that we can expect an increased focus on developing products and technologies that play a role in social action, and integrating these into the workplace.

THE CURRENT EVIDENCE

Turn out your young

To start with, let's consider the most obvious indicator of political involvement – voter turnout. Despite contradictory media claims that a 'youthquake' is coming to rock the ballot box, or that the snowflake young are showing even less interest in political affairs, Gen Z are not set to cause a generational stir – in either direction. Events since 2005 have made no impact on the proportion of British 14-16 year olds saying it's likely they will vote in a general election. Gen Z are just as likely to say they would vote in a general election now as Millennials were at the same age in 2005 – seven in ten (71% of Generation Z and 72% of Millennials).

Generation Z (those who can at least) do definitely vote less than older age groups. But, young people have always voted less – it's a continuous trend throughout Europe and the US. For

NO UPSWING IN SCHOOL CHILDREN'S INTEREST IN VOTING – GB

% likely will vote

MILLENNIALS IN 2005
Those aged 14 to 17

72%

GENERATION Z IN 2018
Those aged 14 to 16

71%

Source
Young People's Omnibus 2018 / Nestlé Family Monitor Citizenship Survey 2005

example, in every US presidential election since 1963, young adults (aged 18-24) have been the least likely to vote. And taking recent elections, where at least some of Generation Z were able to vote, their turnout was just as poor. In the US election of 2016 which saw Donald Trump elected president, turnout among 18-24 year olds in 2016 was 43.4% – well below the estimated overall turnout rate of 55.5%.[129] The 2017 UK General Election showed 18-24 year olds as the least likely age group to have voted, with an estimated 54% casting a ballot, against a national average of 69%.[130]

As we've seen in other sections, differences within cohorts are often more important than changes between them – and the characteristics and attitudes of families are again a key influence on individual young people's views of voting. Among 11-16 year olds who say their parents often or always vote, 82% say they would be likely to vote in a general election, compared with just 55% whose parents only sometimes vote, and 29% whose parents rarely or never vote. This supports the theory that voting is a social norm – with people more likely to vote if they think others are doing so. Children whose parents vote often are more likely to be doing well in school, part of higher income families and with both parents employed. This indicates differences within generations could be more important to determining voter turnout in the future. The young have suffered from some scale of democratic deficit for decades, but the real disenfranchisement is seen among the young and poor.

Joining the party?

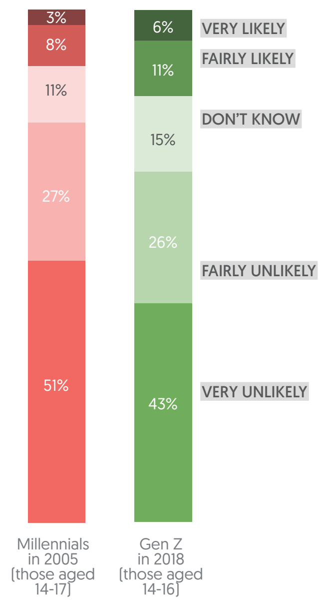
Yet, there may be a generational bottoming out of the declines we've seen in party loyalty over recent decades. One of the strongest generational effects identified in a number of countries including Britain, France and the US, is a cohort-on-cohort decline in attachment to one particular political party.[131] For example in Britain, one in five (20%) of Millennials in 2014 said they identified with a specific party – trailing behind Generation X (28%) and nearly half as supportive as Baby Boomers (38%).

GENERATION Z TEENAGERS ARE LESS CLOSED OFF TO JOINING A PARTY THAN MILLENNIAL TEENAGERS WERE – GB

To what extent do you think you will be likely or unlikely to join a political party in the future?

17%
OF GENERATION Z ARE LIKELY/FAIRLY LIKELY TO JOIN A POLITICAL PARTY

11%
OF MILLENNIALS WERE LIKELY/FAIRLY LIKELY TO JOIN A POLITICAL PARTY



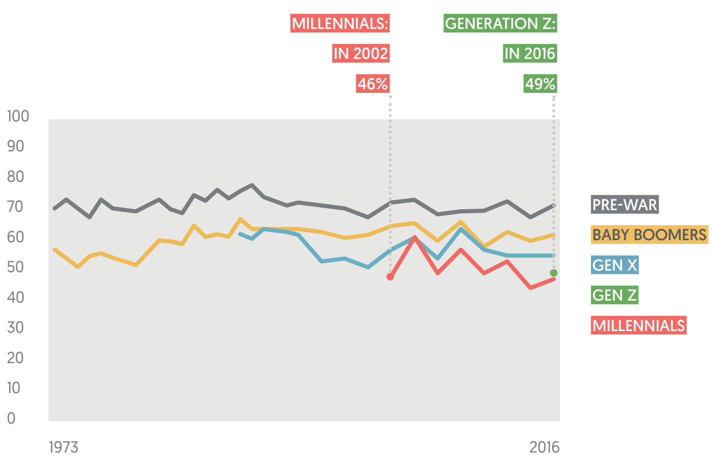
Source
Young People's Omnibus 2018 / Nestlé Family Monitor Citizenship Survey 2005

But, Generation Z children, in Britain at least, seem more open to joining a political party than Millennials were at the same age. When surveyed in 2018, about one in six [16%] of 14-16 year olds think it likely they'll join a political party, which may not seem like much, but is a shift from the one in nine [11%] of Millennial teenagers thinking the same thing in 2005. Teenagers are also less likely to write off joining a party in future – seven in ten [69%] think it's unlikely, compared with nearly eight in ten of Millennials [78%] in 2005.

There is a similar indication that Generation Z might have halted the generational rejection of party politics in the US. Half [49%] of Generation Z old enough to be measured [aged 18-21] have hit adulthood saying they are close to a particular party – actually slightly above the rate Millennials identified with a particular party when they were old enough to vote in 2001 [46%]. Whether this is a start of a new trend among young people is unclear at this early stage, but at least for now, this certainly breaks the pattern of

GENERATION Z ARE SO FAR BREAKING PATTERN OF GENERATIONAL DECLINE IN PARTY IDENTIFICATION – US

% close to one particular party [Democrat/Republican]



Source
Ipsos MORI reanalysis of General Social Survey

generations coming onto the political scene less likely to be close to a particular party. Party loyalty seems to have hit rock bottom.

The kids are all-left

But, who will they vote for? Voting and political orientation are different, and political orientation as a concept is multi-dimensional – it's not as simple as placing Generation Z on a left to right scale. Yet, until more of Gen Z can vote and be measured on various social and economic attitudinal questions, we're not going to be able to definitively pinpoint them on a political compass.

However, we can look at voting intentions to get some sense of where Gen Z's political loyalty lies. Generation Z across Europe are generally more likely to identify as left wing. Using data from Eurobarometer, we can see that Generation Z across a range of European democracies are much more likely to consider themselves as 'left wing' [one to three on a ten-point scale] than 'right wing' [eight to ten on the same scale], with Poland the only exception. It's worth noting, though, the large proportions who consider themselves neither one nor the other – most Gen Z in most countries put themselves in neither box, which fits with our theme of Beyond Binary.

Looking in more detail at Britain – there is a clear generational divide when it comes to voting. Both of the youngest generations are much more likely to say they would vote for Labour compared with older generations: two in five

Millennials [41%] and Generation Z [40%] would vote for Labour, compared with 30% of Generation X, a quarter of Baby Boomers [24%] and 17% of the Pre-War generation.

What is interesting about the Labour vote is how it is has relatively recently seen a generational split. Up until 2010, Labour popularity was much more at the whim of period effects – with popularity fluctuating across all generations depending on the wider political context. Their popularity steadily decreased across all the generations from a high when they were in power in the late 90s, until they lost power in 2010. Since then, the generational divide

EUROPEAN GENERATION Z ARE MORE LIKELY TO IDENTIFY AS LEFT WING

	LEFT WING	RIGHT WING	'NET LEFT'
UK	40%	14%	+26
GERMANY	23%	5%	+18
FRANCE	26%	16%	+10
SWEDEN	48%	17%	+31
SPAIN	41%	7%	+34
ITALY	28%	5%	+23
IRELAND	16%	5%	+11
GREECE	17%	3%	+14
POLAND	12%	19%	-7

Source
Ipsos MORI analysis of Standard and Special Eurobarometer data, 2017

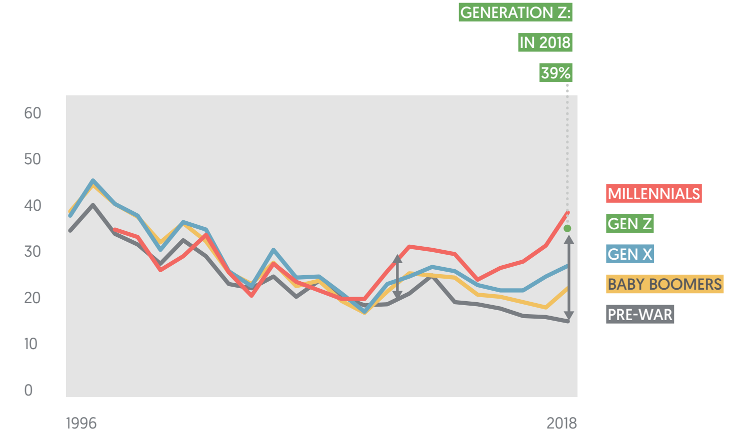
Base
Base sizes vary (c. 300 per country)

has gotten wider. In 2010, the difference between the oldest generation's (Pre-War) and the youngest generation's (Millennials) tendency to vote Labour was just nine percentage points – fast forward to 2018 and it is well over three times that (24 points).

On the other hand, the Conservative vote has always been more generationally driven, but it too has reached record levels of division. The generational difference has become exaggerated over the 2017 election period into 2018, as the Conservatives have suffered a Millennial drop, while enjoying a boost among older generations. Generation Z are coming onto the voting scene with very low interest in the Conservatives (only 17% say they would vote for them).

THE LABOUR VOTE HAS BECOME MORE GENERATIONALLY DRIVEN

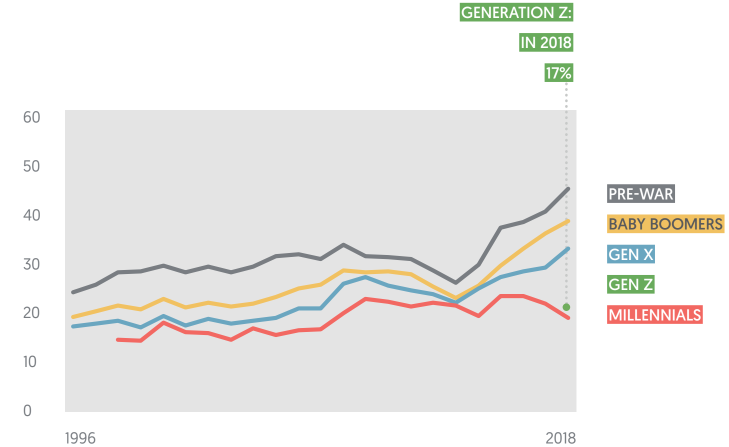
How would you vote if there was a general election tomorrow?
% Labour



Source
Ipsos MORI Political Monitor aggregates

CONSERVATIVE VOTE EVEN MORE GENERATIONALLY DIVIDED

How would you vote if there was a general election tomorrow?
% Conservative



Source
Ipsos MORI Political Monitor aggregates

But, voting intention is also closely connected to life stage – the older people get, the more likely they are to vote for right-leaning parties. And cohort analysis indicates this is less connected to generational factors and more to do with the psychological impact of the ageing process. While the patterns above look very worrying for right-leaning parties, they should not be concerned their electorate will die out completely and be replaced by cohorts who are generationally less likely to vote for them. If they follow the same pattern as previous cohorts, Gen Z will vote less for left-leaning parties and more for right-leaning parties as they get older.[132]

Who belongs? Generation gap on immigration

These political preferences are often reflected in some of the key social issues in Britain – for example, cohorts having a distinct outlook when it comes to immigration. Over the last 20 years the issue has increased in saliency as net migration has increased sharply across Europe. In Britain, concern about immigration as a national issue exploded in the early 2000s – from less than 5% considering it the most important issue up to over a third in 2015, before falling away again after the EU Referendum.

But, this rising concern was not equal across generations. Immigration became a far greater concern to older generations – in 2016 28% of Generation Z placed immigration as the most important issue, compared with a third of Millennials (34%), 46% of Baby Boomers and over half of the Pre-War generation (52%).

IN 2016 28% OF GENERATION Z PLACED IMMIGRATION AS THE MOST IMPORTANT ISSUE, COMPARED WITH A THIRD OF MILLENNIALS (34%), 46% OF BABY BOOMERS AND OVER HALF OF THE PRE-WAR GENERATION (52%)

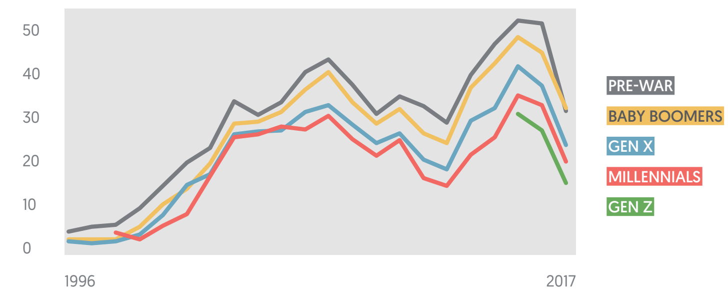
THE GENERATION GAP ON IMMIGRATION REMAINS STARK – GB

What do you see as the most/other important issues facing Britain today?

% Immigration

Source
Ipsos MORI Issues Index

Base
c.12,000 interviews per year, face to face, adults aged 18+, Great Britain



Concern in Britain has dropped across all cohorts since 2016, but the generation gap remains stark – Generation Z are still half as likely as Baby Boomers and the Pre-War generation to see it as a key issue (16% compared to 33%). What this means is we should expect Generation Z to remain far more liberal on immigration.

Just as politically active

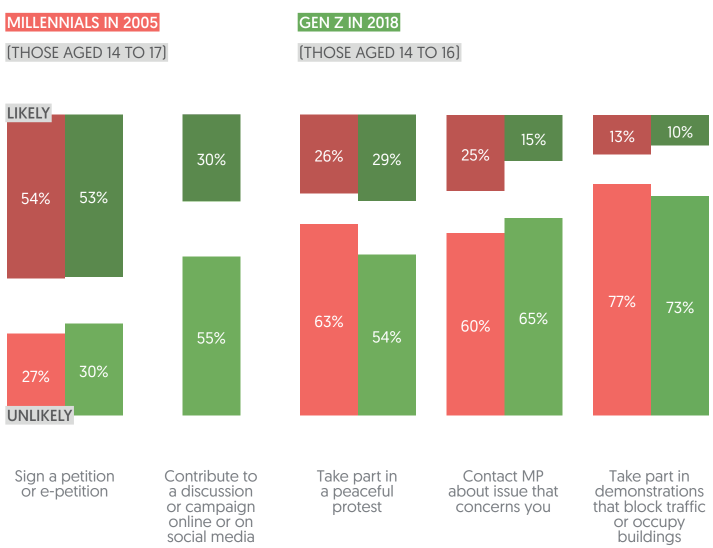
Looking at wider factors of political activism, there doesn't seem to be either a youthquake or a snowflake storm on the horizon, among British teenagers at least. On a number of different metrics, there's been no generational shift in secondary school children seeing themselves as politically engaged in the future. Generation Z 14-16 year olds are just as likely to see themselves signing a petition as Millennials of the same age in 2005 – despite the massive difference in ease and immediacy of signing petitions due to the birth of e-petitions.

The biggest change has been how likely young people are to see themselves engaging with MPs on issues they're concerned with. Just 15% of Gen Z teens would contact their MP, compared with a quarter of Millennials (25%) in 2005. As the chapter on Trust shows, this doesn't seem to be a trust issue: Generation Z are just as likely to trust MPs as other age groups, but perhaps they don't see them as relevant to the issues or concerns they have.

Perhaps the real changes in political activism have been the increased options available. A shift to engaging in politics digitally – actively and even passively – could be more on the cards in the future. Nearly a third of 14-16 year olds see themselves contributing to the discussion on a campaign online or on social media (30%). In the US, the Youth Participatory Politics (YPP) survey indicated that young people don't even necessarily have to be actively engaging in political activities online to be encouraged into political discussions. Young people involved in non-political online communities were more likely to participate in politics and take part in online political discussions.[133]

NO REAL CHANGE IN POLITICAL ENGAGEMENT AMONG POLITICALLY ENGAGED IN THE FUTURE

To what extent do you think you will be likely or unlikely to do each of the following in the future?



Source
Young People's Omnibus 2018 / Nestlé Family Monitor Citizenship Survey 2005

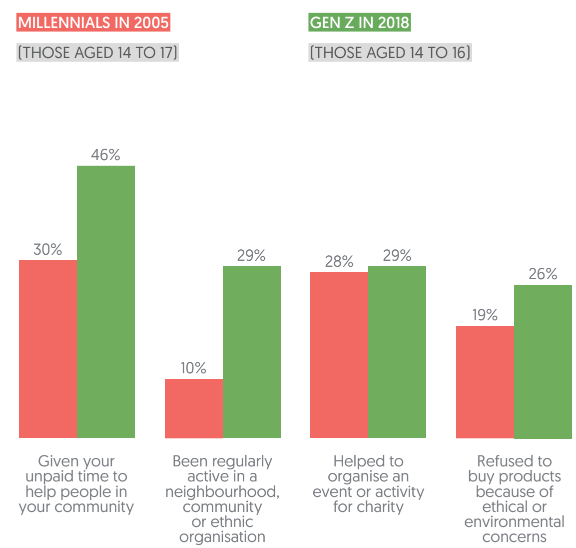
Citizen Z

Volunteering is partly correlated with life stage – and seems to always have been for as long as we have measures. The youngest and oldest members of society generally clock up more hours, arguably because they simply have more hours to give. It's not really surprising, therefore, that adult Generation Z are one of the most active age groups in the UK: 63% of 16-24 year olds (most of whom are likely to still be in education) and 70% of 65-74 year olds (who have hit retirement age) volunteer at least once a year.[134]

In the US, volunteering follows a similar pattern, although middle-aged groups (35-44 year olds and 45-54 year olds) were the most likely to volunteer through or for an organisation at least once in a year (29% and 28% respectively). But, 16-19 year olds still do their bit – with a very similar proportion as these middle age groups (26%) giving time at least once year.[135]

TEENAGE GEN Z MORE LIKELY TO BE SOCIALLY ACTIVE THAN MILLENNIALS AT THE SAME AGE

% who have done the following in the past two years



Source
Young People's Omnibus 2018 / Nestlé Family Monitor Citizenship Survey 2005

AMONG SCHOOL CHILDREN IN BRITAIN THERE SEEMS TO HAVE BEEN A COHORT SHIFT TOWARDS HIGHER SOCIAL ACTIVISM – PARTICULARLY IN TERMS OF GIVING TIME INFORMALLY AND REGULARLY TO THE COMMUNITY

Generationally, however, it's a mixed picture. Among school children in Britain, there seems to have been a cohort shift towards higher social activism – particularly in terms of giving time informally and regularly to the community. Nearly half of 14-16 year olds (46%) say they have given their time to help out people in the community in the past two years, compared with just 30% in 2005. And three in ten (29%) are regularly active in their neighbourhood, community or an ethnic organisation compared with just one in ten (10%) in 2005.

Also, more see themselves getting involved in the future – half (50%) of 14-16 year old Generation Z say it's likely they'll work with an organisation or charity to help people in need, compared with 43% of 14-17 year old Millennials in 2005. Little evidence of selfish tendencies here.

These changes may be a reflection of a UK-wide push towards youth schemes encouraging young people to participate in the community. For example, the #iwill campaign partners with over 700 businesses, schools and charities to encourage social action among 10-20 year olds. The spread of the National Citizen Service (NCS) has led to an estimated 400,000 young people in the UK taking part in its three to four week programme encouraging social mixing, embracing challenges, having greater responsibility and independence, and becoming involved in social action in communities.[136]

In contrast, in the US there's no evidence that Generation Z are any more selfish or any more active than previous generations of young people – volunteering rates among US teenagers are fairly stable. In 2002, 27% of US Millennials (16-19 year olds) volunteered at least once a year, which is on a par with US Generation Z teens today.

Ethical young consumers

A final and important thing to note is the increase in British teenagers who say they have avoided certain products because of the conditions under which they were produced or what they are made from – from 19% in 2005 to a quarter (26%) in 2018. Considering Millennials were often (wrongly it turned out) identified as the generation leading the revolution towards more ethical purchasing, this is an interesting finding and could possibly indicate the beginning of a generation growing up in society which is much more concerned and aware of issues related to ethical products. This is likely to reflect the fact that these discussions are embedding into the media and more companies' core strategy – the environment is changing and the latest generation of young seem to be picking up on it.

FINAL THOUGHTS ...

Speculation about what kind of citizens Generation Z will be is ramping up – will they vote, how will they vote, are they conservative, are they liberal, will they be more involved in the community? In truth there are elements of increased social activism, but also political inertia within Gen Z – the likes of which ended up prompting the media to give Millennials (the rather harsh, and arguably misplaced) nickname of 'selfish snowflakes'.

From the snowflake angle, there is clearly a disconnect between young people and political involvement that has not been solved in Gen Z. They are no more likely to vote as any other generation were when young; there is no change in their likelihood to sign petitions, take part in protests or demonstrations, and they are less likely to engage with their MPs. The answer may come with changing the environment rather than trying to change the generation. Technology and an adaptation of the democratic process itself could bridge the gap between the young and their political context.

Yet, this concern that young people are unshackling themselves further from traditional political parties has slowed to a stop with Gen Z. Whether this is something to do with them as a cohort or as part of a period shift is not yet clear – but, they seem more open to engaging with particular parties.

In terms of social involvement, it's simply not true to label young people as selfish – they're some of the most involved age groups in the US and Britain. There's even evidence in the Britain that they are getting more involved than other cohorts of young, which may be a direct result of increasing opportunities (which always comes out as one of the key drivers of social action – people firstly need to know the option is there). Volunteering face-to-face in communities could be particularly important for a generation getting less and less of their social interaction through physical connections.

IDEALISTIC / REALISTIC

IN BRIEF

GEN Z AND IDEALISM

- A tension exists for this generation in many western, more developed markets: their age should make them idealists (the optimism of youth is a real thing), but the economic context of low growth and uncertain employment pulls them towards a less positive realism about the future.

- This means they're not all gloomy, or as pessimistic as older generations on their behalf – but few are brimming with hope. Only 7% of Baby Boomers and 10% of Generation X expect Gen Z to have a better life than Millennials, but a quarter of Generation Z themselves (25%) expect their lives to be an improvement on Millennials'.

- They do have a focus on success and want to make money (60% of Generation Z in established markets feel this pressure). But it would be wrong to think this indicates shallow materialism – they just know they face tougher times, and in that context, focusing on finances is a sensible response.

- Despite this pressure, there has been a cohort shift away from materialistic values. Schoolchildren now have less materialistic views of happiness and success than schoolchildren of the same age in 2011 – less than a third (30%) feel the things they own say a lot about how well they are doing in life, compared with 42% seven years ago.

- But this doesn't mean teenagers are moving away from brands. Over a third (35%) still feel brand names matter to them (compared with 38% in 2011).

- The experience of and demands from work are also shifting. For example, Saturday jobs are not really a thing any more. In 1997, 42% of 16-17 year old students (older Millennials) were studying and working at the same time – but at the equivalent point in 2014, just 18% of 16-17 year olds (older Generation Z) were.

THE IMPLICATIONS AND THE FUTURE

Future workplaces: rounded and flat

So young people are feeling the pressure to be successful, despite (and perhaps partly because of) having a glass-half-empty attitude to judging their chances of improving on the lives of their parents. Yet ambitions are not just to make money – a decline in materialism among teenagers compared with Millennials at the same age perhaps harbours a change in what Generation Z judge as success. Already, employers are beginning to heed calls to shed the traditional 'corporate ladder' approach – favouring what has been coined by Deloitte as a 'corporate lattice'.[137] A structure adopted by tech startups such as Google, this lattice approach promotes flatter, less hierarchical management. Employees are encouraged to take the initiative and the workplace environment is formed around the importance of integrating employee wellbeing with success. An evolution towards more fluid career paths and holistic job satisfaction could well cater to a generation under pressure, yet showing fewer signs of materialism.

The human cloud – a silver lining?

Gen Z are entering adulthood with less direct experience of the traditional workplace. This is partly out of choice – they

FLATTER FUTURES

Founded in 1996, Valve Corporation is a video gaming and digital platform company with a flat management structure. Employees do not report to managers – instead the company functions through an internal free-market, where time, ideas and projects are allocated. A grassroots approach to new projects means any employee can offer up an idea, and if colleagues think it's good, teams are formed. Performance is measured through peer-to-peer reviews and a ranking system where staff working on the same project rank each other's technical skills, productivity, team-playing abilities and so on. Valve strives to create a family atmosphere, with colleagues looking out for the wellbeing of others, helped by a wealth of office amenities and an annual all-expenses-paid company trip. In 2011, Valve's operating profits were an estimated $2-4bn, making it the most profitable company per employee in the US. In 2017, founder and owner Gabe Newell was estimated to have a net worth of $4.1bn, ranking above US President Donald Trump.

want to focus solely on their studies – but also partly because there's just not many part-time, traditional jobs available. This is mirrored in the growth of the gig economy, which has changed the employment market with an estimated 20-30% of the working population in Europe and the US engaged in independent work.[138] The growth of the 'human cloud', a huge global resource of freelancers available to work remotely on demand, is further evolving the independent employment sector. Online marketplaces such as Amazon's Mechanical Turk[139] and Upwork[140] immediately connect the employer with freelancers who are invited to bid for tasks that cover pretty much every skill an employer could ever want – from admin to design, to digital coding, to legal advice. Due to the fluid nature of the freelancer workforce and their explosive growth, it's hard to predict the scale of these digital marketplaces, but McKinsey estimates that by 2025 (when Generation Z will mostly be in the workforce), 540 million workers will have used these types of sites to find work.[141]

Perhaps this is fitting for a generation less accustomed to clocking in and out at set hours. Yet the benefits and drawbacks of the gig economy is a long-standing debate. For some, these platforms could offer the future workforce the flexibility more suited to a modern employment market, but for others it could lead to poorer job stability and earning potential for a generation already expecting to be financially poorer.

Not brandless – but brands for less

How do you appeal to a generation who know they may not have as much disposable income as their parents did at the same age, yet still value brand names? The importance of diversifying and retrofitting brands to the budgets of younger people with less disposable income will likely become ever more important. There is already a push among retailers, particularly those with online delivery models, to rethink how they can market to lower-income consumers – Amazon has reduced Prime membership costs by more than half to US consumers on certain benefits.[142] The success of European brands such as Lidl, ALDI and Primark – famed for providing cheaper, branded fashion and groceries – can only encourage more inclusive brands.

THE CURRENT EVIDENCE

Realistic about the future

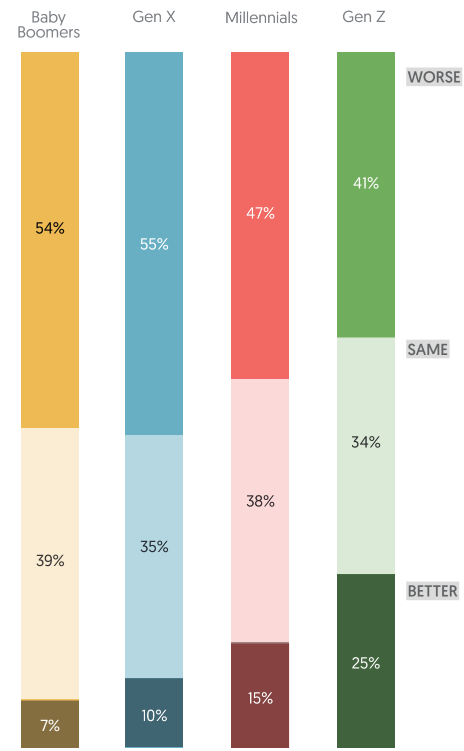
Generation Z have a sobering view of their future, despite the optimism of youth. Two in five (41%) Gen Z feel their lives will be worse than Millennials, and only a quarter (25%) expect their overall quality of life to trump the generation before them.

But this glass-half-empty attitude is anchored in real economic context. The financial crash in 2007, combined with broader trends (wealth across established markets has been tipped increasingly in the favour of older generations), has meant younger generations are struggling comparatively.

A recent analysis of the Luxembourg Income Study by the Guardian newspaper found that incomes for those aged 25-29 in

GENERATION Z ARE MORE OPTIMISTIC ABOUT THEIR OWN FUTURE

Do you think that the generation coming after Millennials, that is those aged 22 or younger, will have a better or worse life than Millennials, or will it be about the same?



Source
Ipsos for BBC Newsbeat 2017

Base
3,000 adults aged 16+

various western European countries and the US have stagnated since the seventies and eighties, compared with the incomes of older people, which have risen. For example, in Italy, income for the 25-29 age group grew by 19 percentage points less than the national average between 1986 and 2010, meaning that in real terms, younger people are no better off than they were in 1986.[143] On various wealth metrics in Britain, younger adults are failing to improve on previous generations. Young families are half as likely to own their own home by age 30, compared with Baby Boomers at the same age, and earnings for adults in their mid-twenties, as well as their disposable incomes, have stagnated.[144]

In reaction, there has been a notable shift in the hopes of established markets for their young people. A complete reversal

PESSIMISM FOR THE FUTURE OF THE YOUNG HAS NEARLY DOUBLED SINCE 2003 – GB

When they reach your age, do you think your children will have a higher or lower quality of life than you, or about the same?

Source
Ipsos MORI reanalysis of British Social Attitudes Survey

THIS PATTERN IS MIRRORED IN THE US

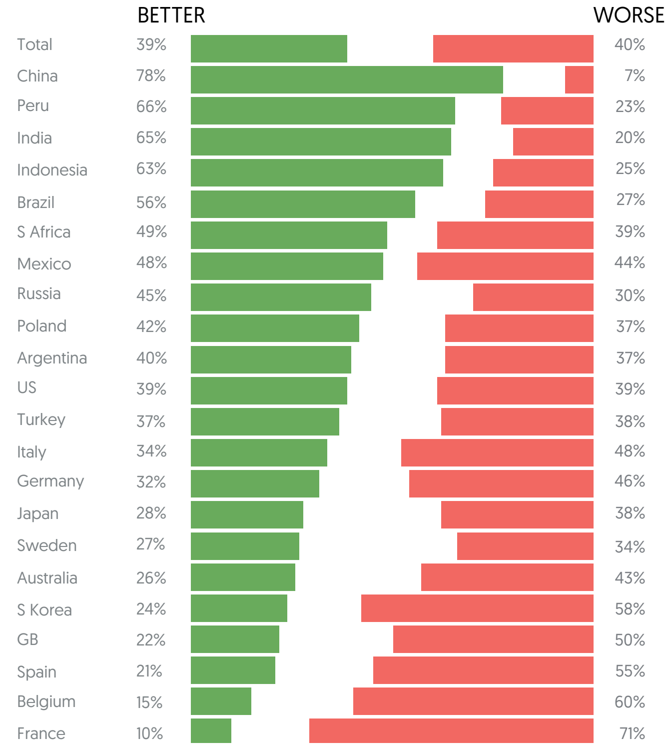
In 2003, 66% thought their children's quality of life would be higher and only 31% thought it would be lower. By 2011, this optimism reversed – only 44% it was likely their children would have a better quality of life, and 55% thought it was unlikely.

in optimism has taken place in Britain and the US over the last 15 years across all age groups. In 2003, optimists for the future of the young outnumbered pessimists by nearly four-to-one in Britain. Now there are just as many pessimists as optimists.

This picture is widespread across established economies, with countries such as France and Belgium mostly filled with pessimists (71% and 60% respectively). However, the story of Gen Z in emerging markets is very different, where there is a much greater sense of optimism. The majority in countries such as China, Peru

PESSIMISM ABOUT YOUNG PEOPLE'S FUTURES IS A WESTERN PHENOMENON

% agree to what extent, if at all, do you feel that today's youth will have had a better or worse life than their parents, or will it be the same?



Source
Ipsos Global Trends Survey

Base
18,810 adults aged 16+ in 23 countries, online, 12 Sep - 11 Oct 2016

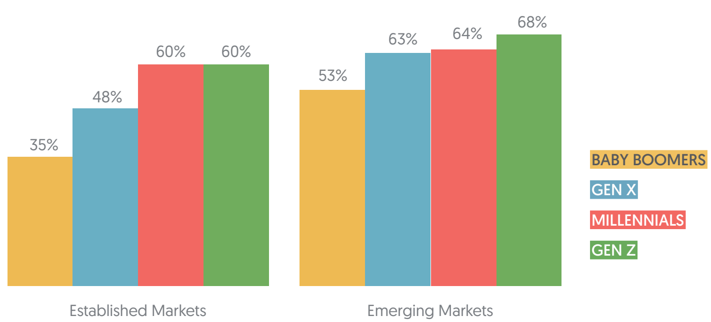
and India believe younger generations will have a better life than their parents did. These patterns mirror the reality of economic growth and opportunity tipping towards the east and south.

Feeling the pressure to succeed

So, in this context, it's no surprise that younger generations feel more pressure to be successful and make money. But this is not a symptom of selfishness, or even materialism (as we shall see) but a reaction to an unforgiving economic climate. The age divide is particularly stark among established markets – three in five (60%) of older Generation Z (16-22 year olds) and Millennials say they feel this pressure to make money and be successful, compared with only a third of Baby Boomers (35%). Of course, there will be strong elements of life cycle effects to this that would happen at

PRESSURE TO BE SUCCESSFUL IS MOST FELT BY MILLENNIALS AND GENERATION Z IN ESTABLISHED MARKETS

% agree "I feel under a lot of pressure to be successful and make money"



Source
Ipsos Global Trends Survey 2017

Base
18,810 adults aged 16+ in 23 countries, fieldwork Sept-Oct 2016

any time in history – the young just tend to have fewer because they've had less time to build up wealth. But the contrast with a much shallower difference in emerging markets suggests a more structural explanation of tougher circumstances in the west.

This could also be exacerbated by the increasing number of young adults remaining in higher education. In Britain for example, three in ten (29%) Millennials already held degrees in 2014 (when aged 18-34), compared with just a quarter of

Generation X (24%) at the same age in 2000. Generation Z seem to be following the same trajectory. With three-quarters (74%) of secondary school children thinking it is likely they will go into higher education, this trend seems set to continue.[145]

Death of the Saturday job

Saturday jobs are not really a thing any more – at least in the UK. Sixth-formers in the UK are now far less likely to have a job compared with the previous generation of schoolchildren. In 1997, 42% of 16-17 year old students (older Millennials) were studying and working at the same time. At the equivalent point in 2014, just 18% of 16-17 year olds (older Generation Z) were.

This is a long-term decline which predates the recession in 2008 and is at odds with labour market data indicating the availability of part-time jobs. Analysis by the UK Commission for Employment and Skills suggests this is more about an attitude change among Generation Z. Although some want to work but can't due to lack of the right job opportunities or increased competition, fewer want part-time jobs. Young people are increasingly choosing to focus on their studies.

THE DEATH OF THE SATURDAY JOB – UK

% 16-17 year olds studying and working

OLDER MILLENNIALS IN 1997
(Those aged 16-17)
42%

OLDER GENERATION Z IN 2014
(Those aged 16-17)
18%

Source
London Economics' analysis of UK Labour Force Survey 1996-2014

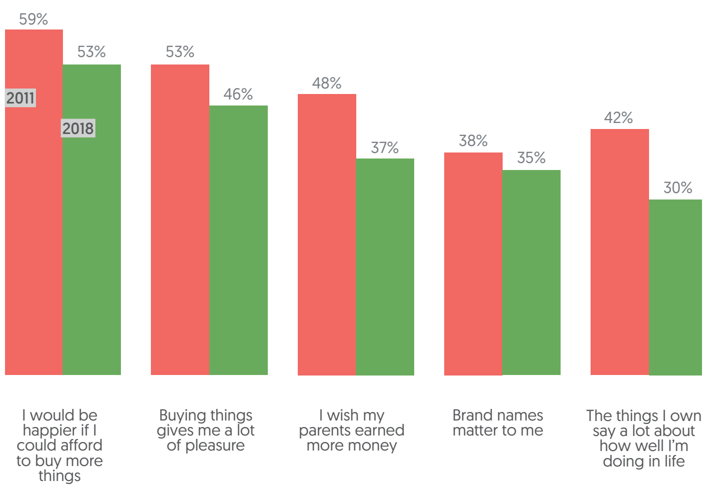
It's not all about the money

There is evidence that, generationally, what it means to be successful and happy is moving away from materialistic interests. Of course, an idealistic attitude is easier to have when relying on the 'Bank of Mum and Dad', but compared with schoolchildren of the same age seven years ago, there does seem to be a shift in values.

Secondary school-age Generation Z (aged 11 to 17) are less likely to agree with a range of materialistic statements compared with Millennial schoolchildren when they were the same age. Less than a third (30%) of younger Generation Z feel the things they own say a lot about how well they are doing in life, compared with 42% in 2011. Less than half (46%) feel that buying things gives them a lot of pleasure (compared with 53% in 2011).

SECONDARY SCHOOL-AGE CHILDREN VALUE MATERIAL THINGS LESS, BUT STILL CARE ABOUT BRANDS – UK

% agree



Source
Ipsos MORI Young Peoples Omnibus 2011 and 2018

Base
c.300 per wave, 23 Jan - 15 Apr 2011 and 5 Feb-6 Apr 2018

And even fewer wish that the all-important 'Bank of Mum and Dad' was bigger (only 37% compared with 48% in 2011).

Yet, importantly, a devaluation of money and materialistic possessions does not mean teenagers are moving away from brands. There has been no real decline in how important teenagers view brands. Over a third (35%) still feel brand names matter to them (compared with 38% in 2011).

FINAL THOUGHTS ...

Economically, Gen Z are in a unique position. In the established markets at least, they're already mostly realistic about what the economic context might mean for their future (unlike Millennials, who invested in higher education and entered adulthood expecting the pattern of generation-on-generation improvement to seamlessly continue for them, only to be bitterly disappointed).

Although they're still too young to have a full sense of what impact this will have in adulthood, there are clear indications that they're on a mission to get some money in the bank and be successful.

But it's not that they're expecting (or wanting) to earn enough to sit in champagne-filled hot tubs – they're just acutely aware of how slippery that economic ladder is nowadays. Actually, it seems that kids now get less pleasure from materialistic things (or so they say) than Millennials did. But it would be a mistake to think that this means they're willing to compromise on brands – brand names are just as important to them as they were for Millennials.

Businesses and policymakers need to avoid the trap of confusing cause and effect, and misunderstanding Gen Z's underlying motivations: they're adapting to their context, in a way that Millennials maybe didn't have the chance to and, with the right approach, can still be engaged.

FINALLY

We hope you've found this first look at Generation Z useful. We've enjoyed pulling it together, as it's helped us make sense of the apparently contradictory and clichéd claims we see too often.

Once again we're struck by how distinctive but varied this cohort is. However, so often, they are not presented in this way. We believe generational perspectives still provide great value, alongside more in-depth reviews that focus more on behaviours and life stages. The increasingly stretched and diverse situations within cohorts mean these are ever more important.

Do let us know if you have data or reflections to add to our growing understanding of Generation Z, or just get in touch to discuss the themes.

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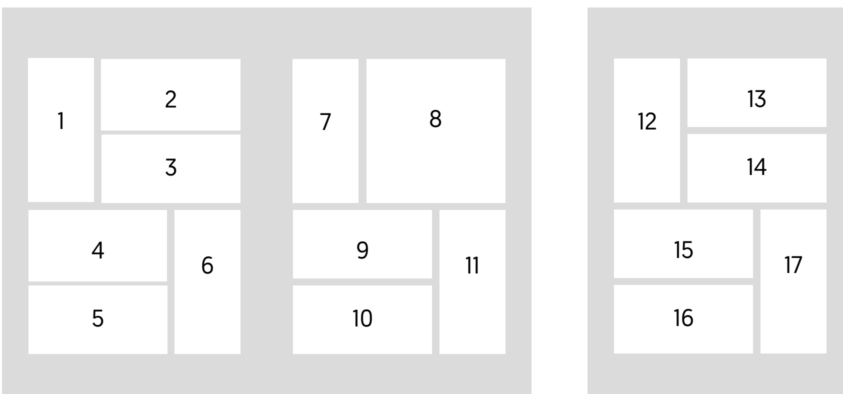
END NOTES

GEN Z: THE FACTS



1. See p26
2. See p28
3. See p30
4. See p38
5. See p56
6. See p37
7. See p62
8. See p50
9. See p150
10. See p39
11. See p138
12. See p56
13. See p69
14. See p139
15. See p152
16. See p154
17. See p153

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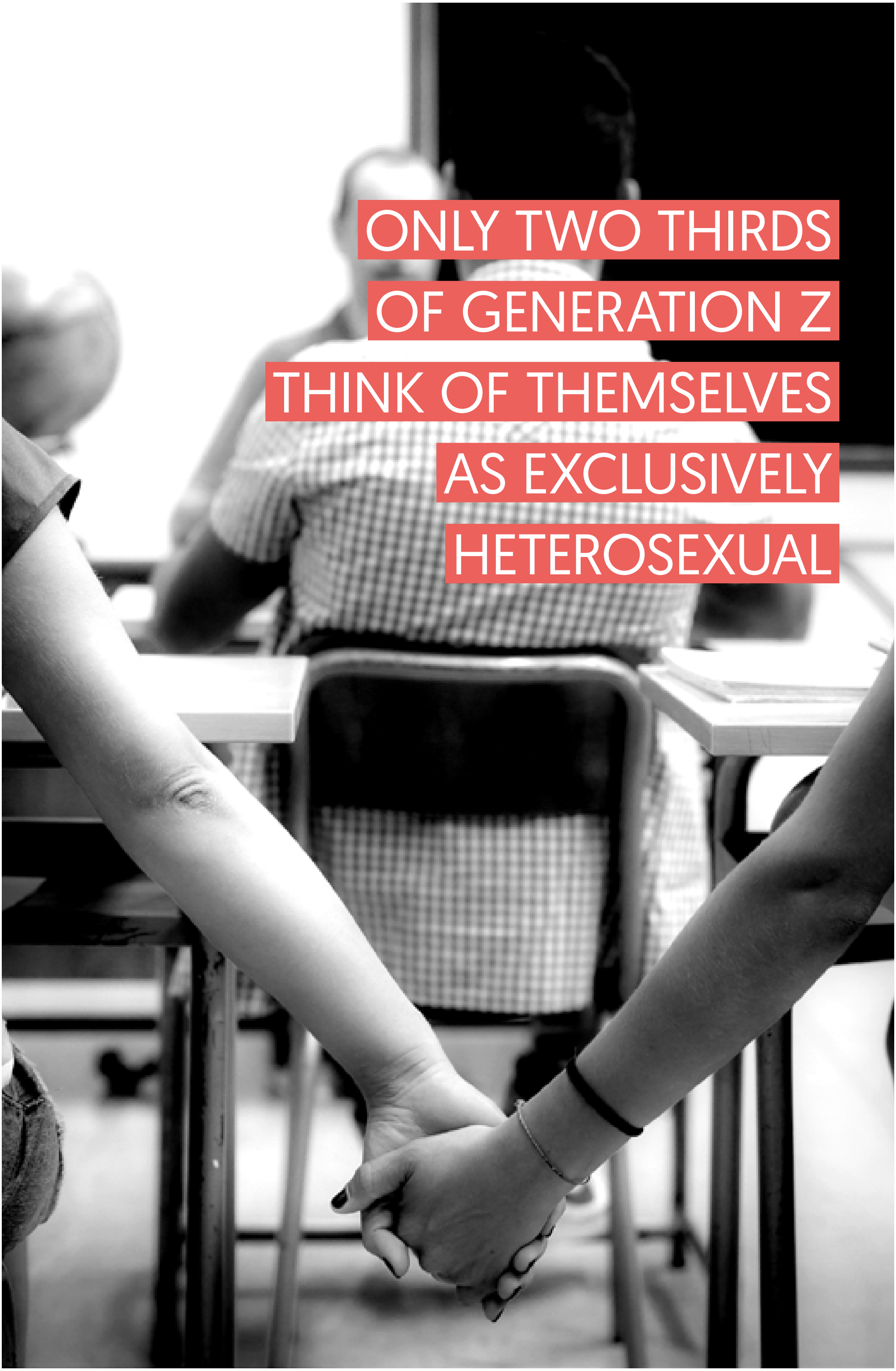
ONLY TWO THIRDS
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