

What **Digital** **Natives** Want

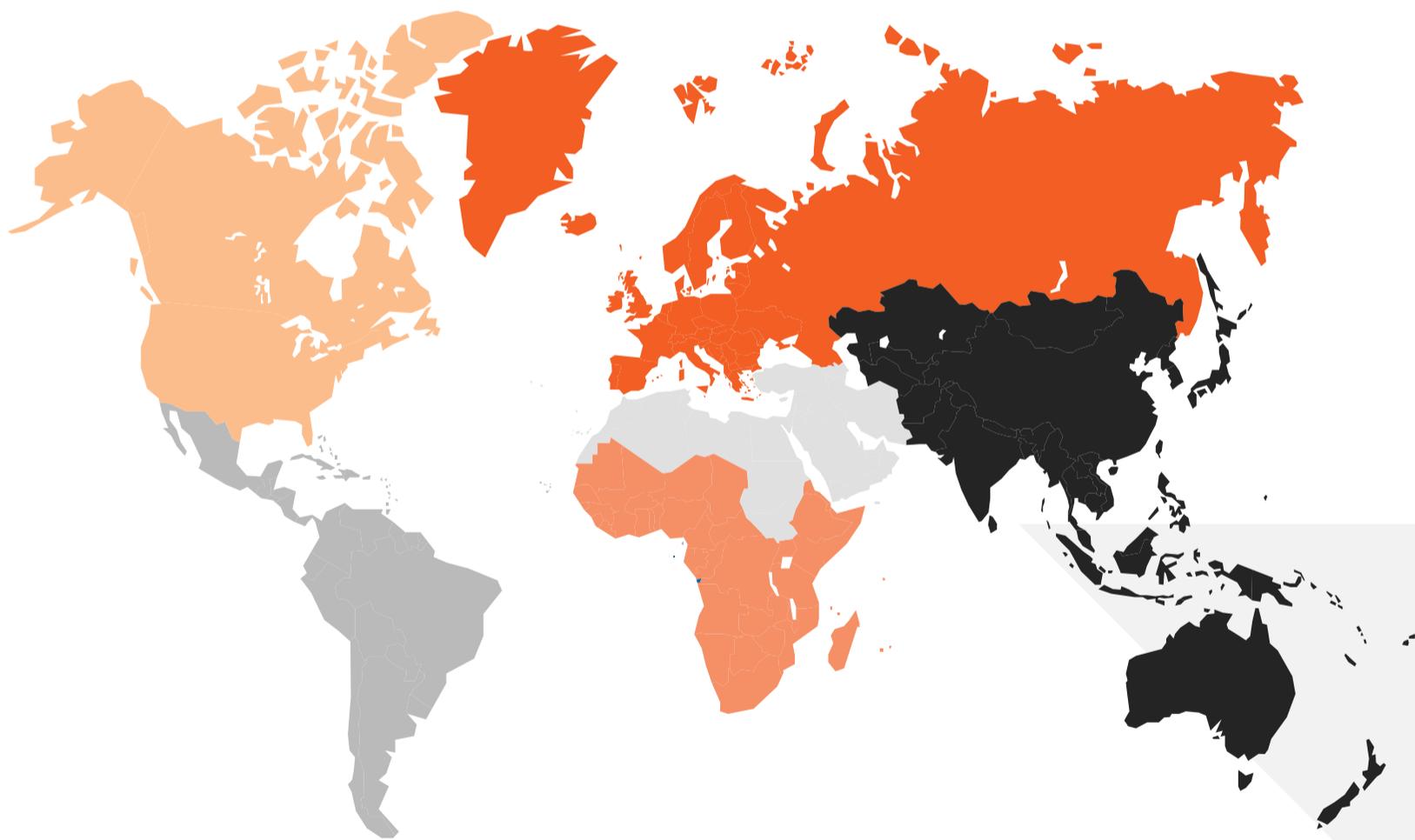
Gen Z Report 2024



Gen Z is All Grown Up!

Gen Z, a generation that has intrigued both older generations and marketers, now accounts for more than 26% of the global population¹, with its eldest members turning 27 this year.

Gen Z by Region in 2024



20%

North America

25%

Latin America & Caribbean

17%

Europe

32%

Sub-Saharan Africa

27%

Middle East & North Africa

24%

Asia Pacific

It seems for the last 10–15 years, we have been talking about the new generation that will one day overtake Millennials as the most important generation as it relates to advertising and consumer consumption. While it seemingly happened overnight, that generation has fully arrived. It is estimated that by 2030, Gen Z's spending power will balloon to \$12T² and will become the largest generation in recorded history.

In addition to their size and spending power, Gen Z is also the most diverse generation, with 50% of its members coming from sundry racial and ethnic backgrounds. Their

differences are not confined to race and ethnicity as they seemingly reject pre-existing cultures and societal norms to form their very own unique groups and styles.

Gen Z is no longer the tweens and teens relying on their parents but instead the most powerful consumer force globally. In the 2024 addition of the TelmarHelixa Gen Z Report, we will explore this cohort from all angles on a global scale. Who are they? Where do they come from? Where do they shop? What do they do for fun? How do they differ from previous generations? And, most importantly, what has changed as they have matured?

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What's Hot



Gamers

2.41x



Outdoor Enthusiasts

1.93x



Music Lovers

1.45x



Entertainment Junkies

1.34x

What's Not



Party Goers

0.55x



Money Savers

0.29x



Travelers

0.21x



Health Conscious

0.16x

Affinity: Helixa proprietary statistical calculations that measures the level engagement of the target audience as it relates to a given base population. Affinity score is based on a 1.00x index scale, which represents the average consumer as it relates to the base population.

Are We Really Bringing Back the '90s?

In our 2022 version of the Gen Z report, we first noticed the importance of nostalgia for this audience. While interesting, nostalgia is not unique to the Gen Z audience. The global COVID-19 pandemic changed all consumer behavior and habits. Perhaps most notably, many people stuck at home turned to familiar hobbies and comforts, seeking ways to cope with

boredom or, in some cases, the need for a sense of familiarity and comfort. Does Gen Z truly have a nostalgic appreciation for things from the past? Or were they following the global trend of the time?

It turns out that yes, Gen Z, despite being born between 1997 and 2012, is in love with the 90s.

47%

of Gen Zers in the US state they buy the brands they grew up with and their that parents used.

Top Gen Z Nostalgia Items by Relevance



1. MTV



2. Taco Bell



3. Pokemon



4. Pretty Little Liars



5. Victoria's Secret



6. GameSpot



7. GameStop



8. Forever 21



9. South Park



10. Nickelodeon

Relevance: TelmarHelixa proprietary statistical calculation that identifies the most engaged items in a given category as it relates to your audience.



Holding Onto Gen Z's Attention

Top Purchase Considerations

Gen Z vs Millennial Considerations

■ Gen Z

■ Millennial

I expect the brands I buy to support causes



I buy the brands I grew up with



I often seek advice from others when it comes to purchase decisions



I tend to make impulse purchases



Top **Social Issues** for Gen Z

1st

Human Rights, Ethnic & Identity Groups

2nd

Charity, Philanthropy & Poverty

3rd

Medical & Health Organizations

4th

Religion & Beliefs

5th

Environmental Organizations



Gen Z Top Five Persona Segments in 2024

Segments represent the five largest audience segments among Gen Z per TelmarHelixa Discover 2024. Listed are the top five attributes and lifestyles each segment has in common by relevance..



Fashion Foodies

- Women's Clothing
- Footwear
- Coffee Houses
- Pizzerias
- Fast Casual



Activists

- Punk Music
- Footwear
- Fast Food
- Skateboarding
- Dance Music



Competitors

- Sports Video Games
- Footwear
- Athletic Apparel
- Sporting Goods
- Game Platforms



Dedicated Gamers

- Shooter Video Games
- Action & Adventure Video Games
- ESports Leagues
- Computer Hardware
- Soft Drinks



Entertainment Junkies

- Action & Adventure Games
- Record Labels
- Women's Clothing
- Make-Up
- Anime Shows

Relevance: TelmarHelixa proprietary statistical calculation that identifies the most engaged items in a given category as it relates to your audience.

Influencing a Generation

Gen Z, which has famously rejected alcoholic beverages — Gen Z drinks 20% less alcohol than millennials³, find themselves under the influence of celebrity culture.

The global influencer market as of 2024 is \$16.5B and is expected to reach \$200B by 2032⁴. Largely driven by the digital-first generation and habits of Gen Z, it's impossible to separate Influencer marketing from this connected generation. Thanks to their one-to-one relationship with many content creators, they feel more connected, and tend to be more influenced by the actions of those they follow.



The Influence of Influencers

Musicians continue to be the dominant force demanding the attention of Gen Z. They are 1.6x more likely to be music lovers than the average consumer. Surprisingly, Taylor Swift, who seemingly has taken over the world, is not the most popular influencer in this year's rankings.



35%

of Gen Zers say they are more likely to purchase products supported by their favorite celebrity.

Who's influencing Gen Z?

Top Celebrity, Macro, and Micro influencer



Fashion Foodies

Celebrity: Drake

Macro: Spok

Micro: Kayden Stephenson



Activists

Celebrity: Emma Watson

Macro: Jon Cozart

Micro: Amara Que Linda



Competitors

Celebrity: LeBron James

Macro: hayashii

Micro: Docks



Dedicated Gamers

Celebrity: Kendrick Lamar

Macro: Burnsy

Micro: 23savage



Entertainment Junkies

Celebrity: Ariana Grande

Macro: beaux

Micro: Riya Malik

Celebrity: Over 1 Million Followers | **Macro:** 100k to 1 Million Followers | **Micro:** 10k to 100k Followers

Where Gen Z is Shopping

Top retailers each segment is engaging with sorted by relevance.



Fashion Foodies

Nike
Victoria's Secret
Forever 21
PacSun
Jordan



Activists

Nike
Victoria's Secret
Forever 21
Jordan
H&M



Competitors

Nike
Jordan
Adidas
Finish Line
Foot Locker



Dedicated Gamers

Nike
Jordan
Adidas
Vans
Finish Line



Entertainment Junkies

Victoria's Secret
Forever 21
Nike
H&M
Hot Topic

Relevance: TelmarHelixa proprietary statistical calculation that identifies the most engaged items in a given category as it relates to your audience.



Meet Gen Z at Their Passion Points

In a world where only 11% of the global Gen Z population state they “watched cable TV in the last week,”⁵ and 65% state they “usually do other things” while watching TV, it is imperative to find non-traditional and digital avenues to connect with Gen Z consumers.

The good news, Gen Z devours content. Globally Gen Z averages nine hours of screen time per day which is roughly three hours more than the average person⁶.

62%

of Gen Zers state that going online is their favorite thing to do.

68%

rely on the internet to connect with friends and family.

80%

say it’s important to have internet access when “I am on-the-go.”

Where Oh Where Could Gen Z Be?

Gen Z has its obvious favorites when it comes to entertainment. Social is the clear number 1 – Global Gen Zers spend most of their time on YouTube (98%), followed by TikTok (84%), Snap (61%), Instagram (58%) and Facebook (56%).⁷

A staggering 61% of Gen Z TikTok users are more likely to watch content on TikTok (10.5 hours/week) than on TV (8.4 hours/week). YouTube follows closely, with Gen Z spending an average of 6.9 hours per week on the platform. Netflix trails in third place, capturing their attention for 3.1 hours per week. These platforms are not just entertainment sources; they are cultural touchstones for Gen Z.



When it comes to specific streaming platforms and content, the data reveals that 55% watch long-form streaming content on Disney+, while 36% watch Hulu, and 15% watch HBO Max.

Top TV Shows by Relevance



1. Pretty Little Liars



2. Rick and Morty



3. American Horror Story



4. Stranger Things



5. Sportscenter



6. SpongeBob



7. Victorious



8. iCarly



9. The Office



10. Orange Is the New Black

Relevance: TelmarHelixa proprietary statistical calculation that identifies the most engaged items in a given category as it relates to your audience.

When Gen Z Streams

Top shows each segment is watching sorted by relevance.



Fashion Foodies

Pretty Little Liars
American Horror Story
Victorious
iCarly
Spongebob



Activists

Pretty Little Liars
Stranger Things
American Horror Story
Rick & Morty
Spongebob



Competitors

Sportscenter
NBA on ESPN
NBA on TNT
College GameDay
First Take



Dedicated Gamers

Rick and Morty
South Park
Sportscenter
The Walking Dead
Family Guy



Entertainment Junkies

Pretty Little Liars
American Horror Story
Victorious
Stranger Things
iCarly

Relevance: TelmarHelixa proprietary statistical calculation that identifies the most engaged items in a given category as it relates to your audience.

Surfing the Web... It's Still a Thing!

For Gen Z social media is king as they are 25% less likely to use Google for search compared to previous generations⁸. Additionally, only 64% of Gen Z reports use search engines for brand discovery. In comparison, 94% Baby Boomers report using search engines to find new brands.

But not all is lost! It turns out that while Gen Z almost exclusively relies on social and their favorite influencers for brand discovery or exploration organic web traffic remains strong. 40% of Gen Z reports that they visit their favorite websites "often."⁹

So what are their favorites and where do they go while surfing the web?



Top Websites by Relevance



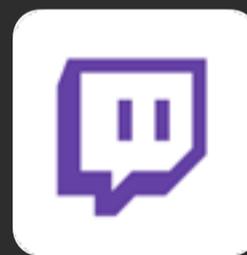
1. UberFacts



2. IGN



3. Smosh



4. Twitch



5. YouTube



6. WorldStar



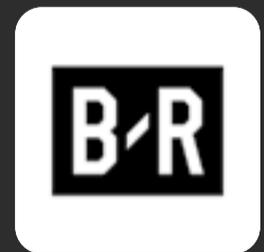
7. Men's Humor



8. Nike.com



9. GameSpot



10. Bleacher Report

Relevance: TelmarHelixa proprietary statistical calculation that identifies the most engaged items in a given category as it relates to your audience.

When Gen Z Goes Online

Top websites each segment is visiting sorted by relevance.



Fashion Foodies

UberFacts
Smosh
YouTube
WorldStar
IGN



Activists

UberFacts
IGN
Disney
YouTube
Twitch



Competitors

Bleacher Report
ESPN
Nike.com
ESPN Bet
Men's Humo



Dedicated Gamers

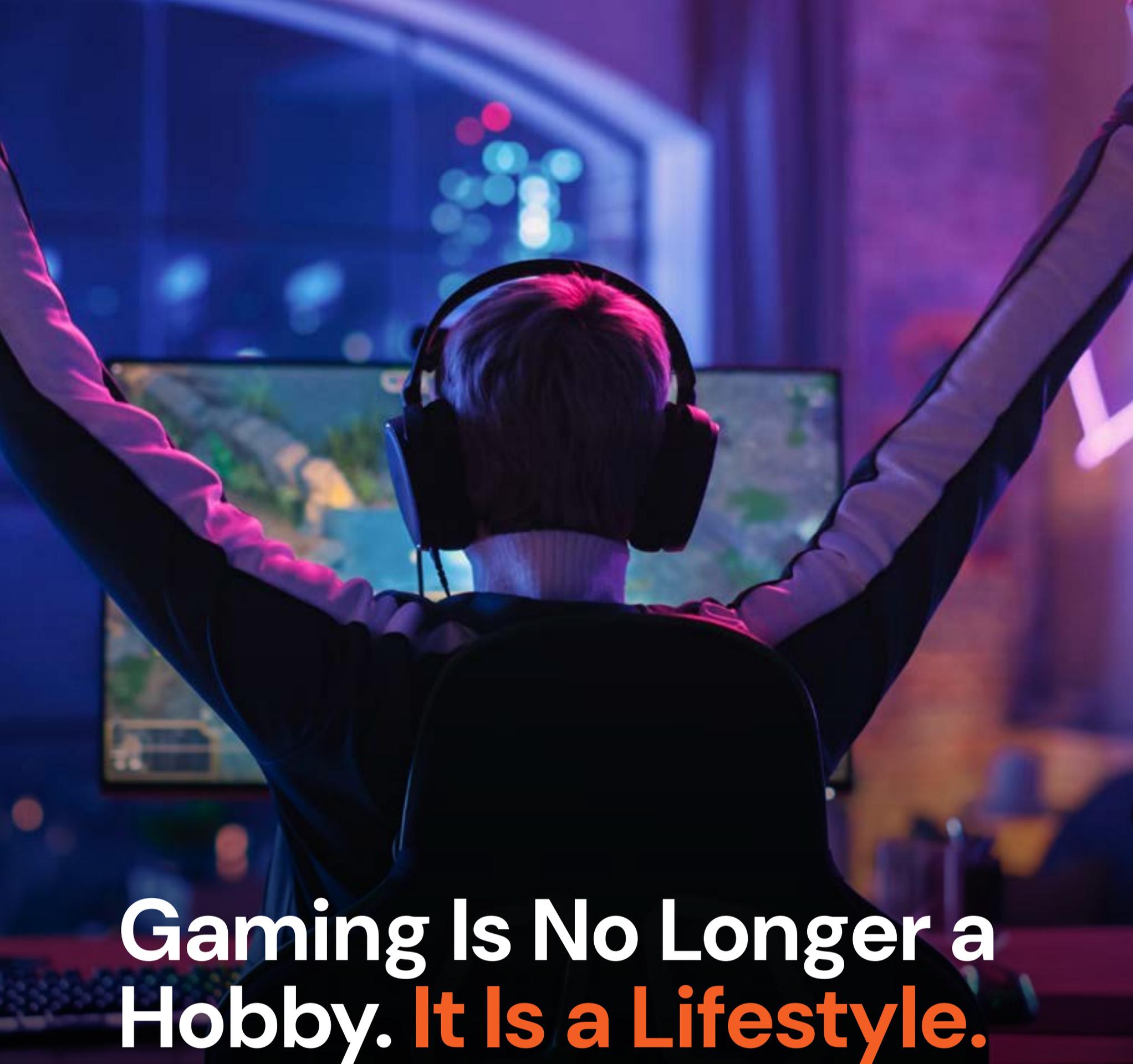
IGN
Twitch
Gamespot
YouTube
Smosh



Entertainment Junkies

YouTube
UberFacts
Smosh
IGN
Disney

Relevance: TelmarHelixa proprietary statistical calculation that identifies the most engaged items in a given category as it relates to your audience.



Gaming Is No Longer a Hobby. **It Is a Lifestyle.**

A staggering 86% of the Global Gen Z population report they play video games “regularly”¹⁰. Of those regular gamers, 53% percent report spending more than \$20 per month on gaming.

\$220B in global market value makes gaming the most powerful way to connect with Gen Z.

Connect Through Gaming

Top video games segment is playing sorted by relevance.



Fashion Foodies

Call of Duty
Fortnite
Pokemon
NBA 2k
Destiny



Activists

Pokemon
Fortnite
Call of Duty
Overwatch
Animal Crossing



Competitors

Fortnite
Call of Duty
NBA 2k
EA FC
Madden NFL



Dedicated Gamers

Call of Duty
Pokemon
Fortnite
Destiny
Overwatch



Entertainment Junkies

Pokemon
Call of Duty
Fortnite
Overwatch
Destiny

Relevance: TelmarHelixa proprietary statistical calculation that identifies the most engaged items in a given category as it relates to your audience.

The Gaming Ecosystem

Favorite Game, By Genre



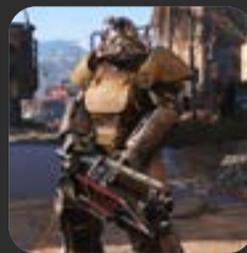
Action & Adventure Games
Pokemon



Shooter Games
Call of Duty



Sports Games
NBA 2k



Role Playing Games
Fallout



Strategy Games
Minecraft

Favorite Game Publishers



Rockstar Games



Ubisoft



Electronic Arts



Bethesda



Naughty Dog

Favorite eGaming Teams



OpTic Gaming



FaZe Clan



MLG



100 Thieves



TSM



A Tale of Two Countries: Gen Z in the US vs. GB

Across the United States and Great Britain, Gen Z consumers share many similarities. For example, they are proficient with technology and strongly committed to social justice issues.

Both groups are vocal about climate change, mental health, and inclusivity, often using social media as a platform for activism. However, there are notable differences shaped by cultural context.

In the US, Gen Z tends to emphasize individualism and personal expression, often prioritizing entrepreneurship and diverse career paths. In contrast, GB Gen Z may lean more towards collective identity, reflecting a stronger emphasis on community and social welfare, influenced by the GB's historical context of public services and social support. Additionally, political engagement differs. While in the US Gen Z tend to rally around specific political figures or movements, in the GB they often focus on broader issues. Despite these distinctions, both groups are united by their desire for change and a more equitable future.

Gen Z Great Britain

Top Social Issues and Values

1. LGBTQ+ Organizations

2. Animal Welfare & Wildlife Organizations

3. Human Rights, Ethnic & Identity Group

4. Charity, Philanthropy & Poverty

5. Medical & Health Organizations

Top Influencers



1. Gary Lineker



6. KSI



2. Elon Musk



7. Anthony Joshua



3. Ricky Gervais



8. Kanye West



4. Jack Whitehall



9. Jeremy Clarkson



5. Fabrizio Romano



10. Rihanna



Top Websites

1. LADbible
2. UberFacts
3. YouTube
4. Twitch
5. IGN



Top Purchase Considerations

1. Advertising
2. Green Credentials
3. Low Price
4. Facilities
5. Organic Range



Top TV Shows

1. Love Island
2. I'm A Celebrity, Get Me Out Of Here
3. Geordie Shore
4. Beyond Paradise
5. EastEnders



Top Games

1. EA FC
2. Fortnite
3. Call of Duty
4. Fall Guys
5. Pokemon

All items sorted by relevance. **Relevance:** TelmarHelixa proprietary statistical calculation that identifies the most engaged items in a given category as it relates to your audience.



Gen Z: A Connected World

Gen Z in the US and the rest of the world shares a common foundation of digital fluency and a commitment to social justice, but their priorities and expressions of identity can vary significantly due to cultural and socio-economic factors.

In the US, Gen Z often emphasizes individualism and self-expression, driven by a competitive job market and a culture that celebrates entrepreneurship. This can lead to a focus on personal branding and career aspirations. Conversely, Gen Z in many other parts of the world prioritize community and collective well-being, influenced by local socio-political issues and historical contexts.

Moreover, while US Gen Z is heavily influenced by media narratives and trends, their global counterparts often engage with a wider range of cultural influences, reflecting diverse perspectives and experiences. Issues like climate change and mental health resonate universally, yet the approaches and urgency can differ, shaped by local realities. Ultimately, while Gen Z worldwide shares core values of connectivity and progress, their expressions and priorities are uniquely influenced by their environments.

Gen Z: Rest of the World

Top Social Issues and Values

1. Human Rights, Ethnic & Identity Group

2. Animal Welfare & Wildlife Organizations

3. Environmental Organizations

4. Charity, Philanthropy & Poverty

5. Medical & Health Organizations

Top Influencers



1. Taylor Swift



6. Justin Bieber



2. Katy Perry



7. Ariana Grande



3. Emma Watson



8. Selena Gomez



4. Lady Gaga



9. Robert Downey Jr



5. Rihanna



10. Demi Lovato



Top Websites

1. IGN
2. YouTube
3. GameSpot
4. Wizarding World
5. Twitch



Top Purchase Considerations

1. Low Price
2. Aligns with my Culture
3. Brand Trust
4. Green Credentials
5. Advertising



Top TV Shows

1. M Countdown
2. Music Bank
3. Pretty Little Liars
4. ASAP Natin' To
5. Stranger Things



Top Games

1. League of Legends
2. Pokemon
3. Cyberpunk 2077
4. Overwatch
5. Animal Crossing

All items sorted by relevance. Relevance: TelmarHelixa proprietary statistical calculation that identifies the most engaged items in a given category as it relates to your audience.

A Generation Apart, Around the Globe

The Gen Z audience around the globe is characterized by its diverse backgrounds, values, and experiences, yet shares common traits that unite them. This generation is marked by a strong sense of social justice and environmental awareness, often advocating for issues like climate change, racial equality, and mental health. As digital natives, they seamlessly navigate technology and social media, using these platforms to connect, share, and mobilize. However, their experiences can differ significantly based on cultural and economic conditions. For instance, while some may prioritize education and career opportunities, others might focus on activism and community-building in response to local challenges. Despite these variations, Gen Z globally is united by a desire for authenticity, inclusivity, and meaningful change.

This generation is marked by a strong sense of social justice and environmental awareness, often advocating for issues like climate change, racial equality, and mental health.



Top Apps: Gen Zs Preferences by Category

RIDESHARING APP

Uber

Over

lyft

FOOD DELIVERY APPS

DOORDASH

Over

Uber
Eats

SHORT-FORM VIDEO SOCIAL NETWORKING APPS

TikTok

Over

Instagram

SOCIAL NETWORKING APPS

@

Over

X

QUICK SERVE FOOD APPS

McDonald's

Over

TACO
BELL

MUSIC APPS

Spotify

Over

Apple Music

WEATHER APPS

Weather Channel

Over

AccuWeather

Discover What Makes Your Audience Unique in Seconds

TelmarHelixa's Discover platform is an audience insights solution that combines complex signals from search, social, and digital behavior to unlock timely and meaningful insights about audiences in just seconds.

Understand People in a Rapidly Evolving World

Discover leverages proprietary algorithms to process millions of online interactions and deliver comprehensive insights, normalized to general populations.

The results span demographics, psychographics, products and services, media, and influencers to give you an instant portrait of the complex audience segments that impact your brand.

For more information, please contact sales@telmarhelixa.com.



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