



GEN Z REPORT 2021

# Connecting with the Connected Generation

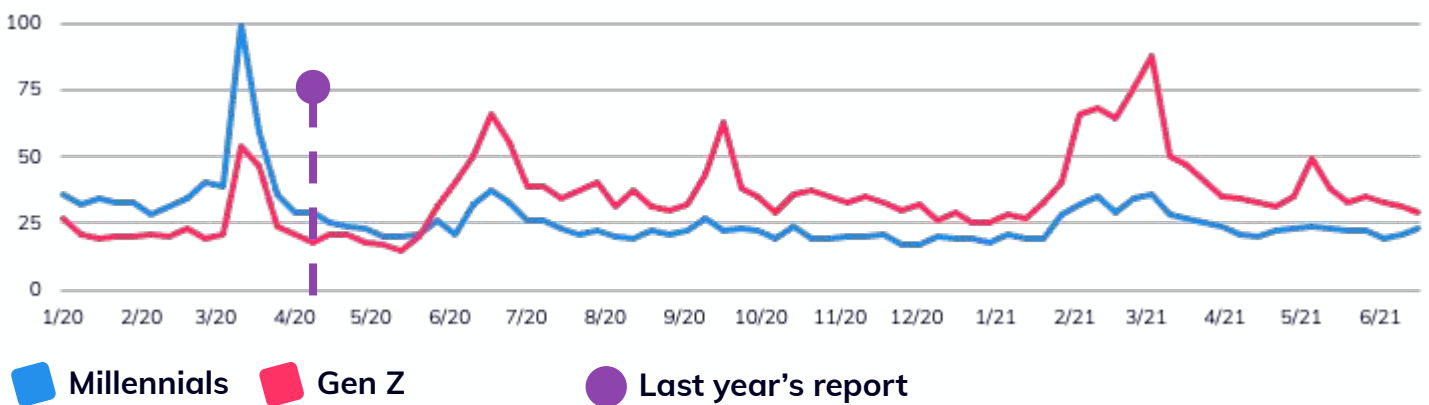


# Introduction

In June 2020, interest in “Gen Z” finally surpassed “Millennials” in Google Search, demonstrating a growing interest in this connected generation.

This means you’re up against stiff competition. To break through the noise Gen Z is subjected to on a daily basis and hold their attention for more than eight seconds<sup>1</sup>, you need to understand what they care about and connect in a more authentic way.

## Search Traffic<sup>2</sup>



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# A \$323 billion opportunity



## Big spenders

Gen Z adults are filling their first shopping carts, right now.

Some are lining up to grab the hottest new video game, while others struggle through their first solo trip to the grocery store.

**The decisions they make at these critical moments could represent a lifetime of brand loyalty.** If you lose them to your competitors, the sting may be felt for years to come.

## Household influencers

Outside of their own purchases, they wield considerable influence at home. Their purchasing power of \$323B could grow by 4x when accounting for influence in the home.<sup>1</sup>

Not only do members of Gen Z influence their parents' brand decisions, **they also impact the retailers and product features their families consider when making purchases.**



**42%** of parents say the impact is significant<sup>2</sup>

**“Estimates of Gen Z purchasing power have increased by ~125% since our last report.”** — **Laia Pescetto,**

**VP Marketing, Helixa**

# Getting Gen Z's Attention

There is an often-repeated statistic that clocks the Gen Z attention span at eight seconds (compared to 12 seconds for Millennials).<sup>1</sup>

If that's true, you have no time to waste when it comes to grabbing that attention... and holding on to it.

\*See page 26 for sources of citations

# Ready to connect...for now

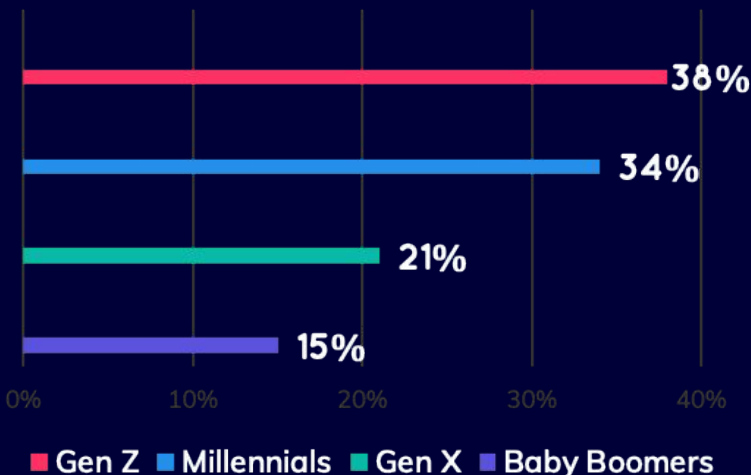
We often hear from companies who think influencers are the only way to get the attention of Gen Z. Truth is, they are more likely to connect with your brand online than any other generation.

But if you want to cut out the middleman and speak to them directly, you need to understand what they care about.

# 37%

will provide personal info for something they want<sup>1</sup>, down 3% from last year

## “I like to connect with brands on social media”<sup>2</sup>



## Cut through the noise

Gen Z deals with a lot of noise on the day-to-day, and many companies are vying for their attention.

In fact, 43% of Gen Z say they find it difficult to choose what to pay attention to between all the things they have to watch, listen to, and read.<sup>3</sup>

Another generic marketing message is not going to cut through this noise. Instead, let's take a look at Gen Z's top interests to better understand the kinds of content they would be excited to check out.

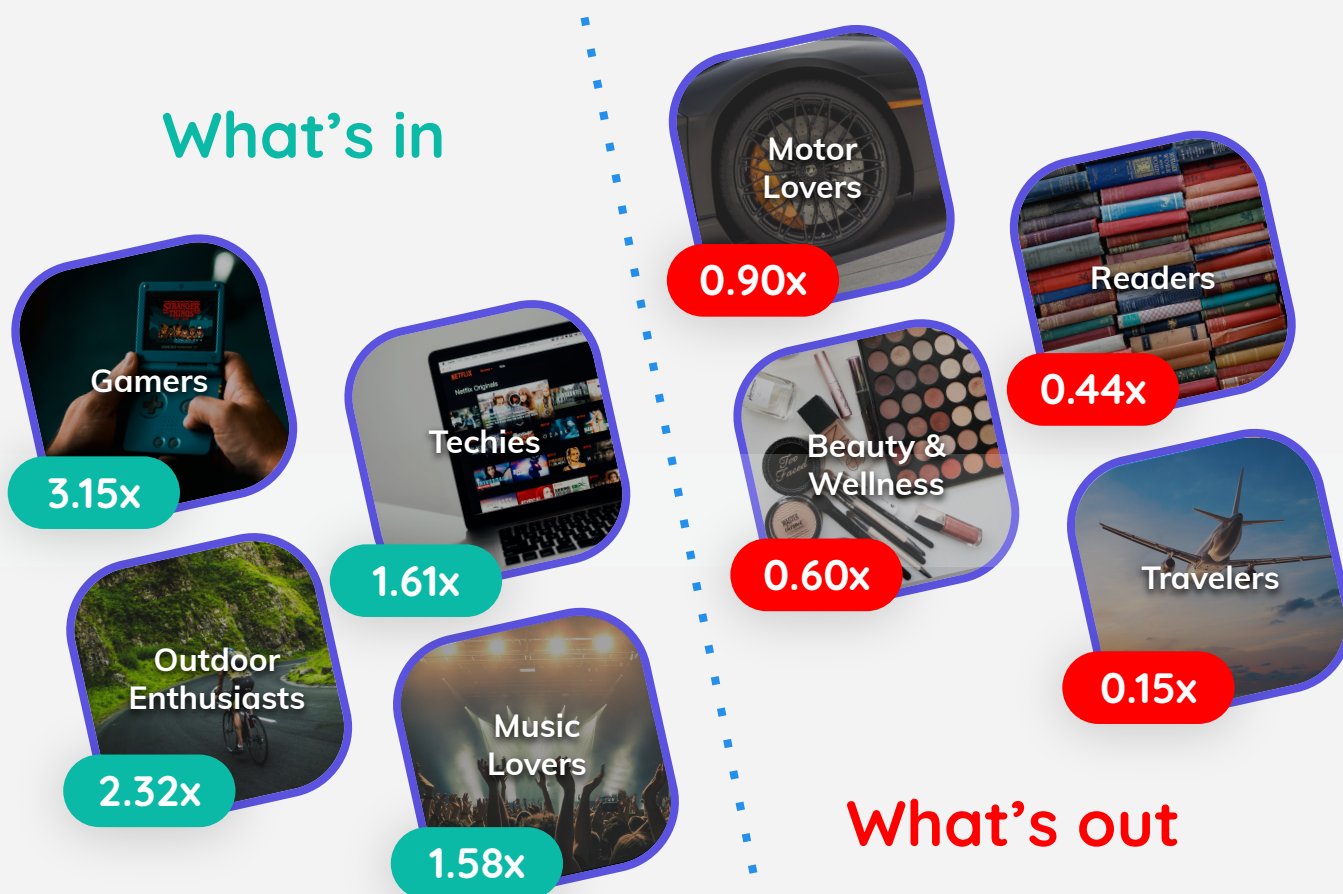
# Top lifestyles and interests

## What's in

Gen Z includes many gamers — more than any other generation. But, that's not all they care about: Many in this generation are passionate about being outdoors and playing sports. They are digital-first, not digital-only. This year, music was also a top interest for the first time.

## What's out

For us, the most surprising insight from this section was the lack of affinity for the beauty & wellness category. However, when you dig deeper in the platform, you find that the segments of Gen Z that are into beauty are really, really into it. The key is using segmentation.



**NOTE:** The above affinity scores index the interest of a specific audience (in this case, Gen Z) against the average U.S. adult, based on online engagement. 1.00x would represent average interest. You will see these scores throughout the report.

# Segments provide a nuanced view

Personalities

Lifestyles

Interests

Opinions, Attitudes, Beliefs

Values

## Agree to disagree

Because Gen Z can't seem to agree on much, we think the best way to understand them is through segmentation.

The lifestyles on the previous page are a great start, but they are just isolated categories.

For personas to be effective, they need to take into consideration interests, actions, and motivations, not just demographics. Your audience will be identified at the intersections of those attributes.

## Find the intersections

We used the AI-powered segmentation tool in the Helixa platform to split Gen Z into five interest-based segments.

This allows us to focus in on more useful and actionable insights.

You can see those segments on the next page — where we break down core attributes for each. They will also appear throughout the report as we explore different interest categories.



# GETTING GEN Z'S ATTENTION

## Gen Z's five segments

### What interests are trending

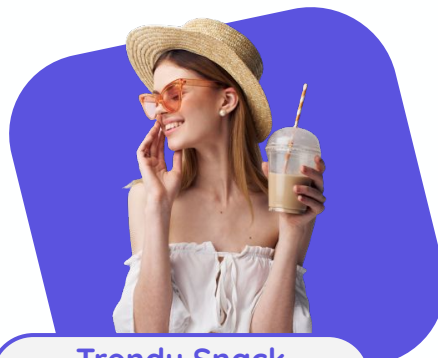
**NOTE:** This year's segmentation was similar to last year's, with one exception: Our "Music Lovers" were replaced by a growing segment of "Activists"



**Entertainment Fanatics**

#### Notable Interests

- Celebrities
- Record companies
- Gaming
- Clothing companies
- Books



**Trendy Snack Lovers**

#### Notable Interests

- Candy & sweets
- Beauty products
- Gaming
- Online celebrities
- Clothing companies



**Competitors**

#### Notable Interests

- Soccer
- eSports
- Basketball
- Sports clothes
- Sports games



**Dedicated Gamers**

#### Notable Interests

- Gaming
- Online celebrities
- Shooter games
- Computer hardware
- Video game companies



**Activists**

#### Notable Interests

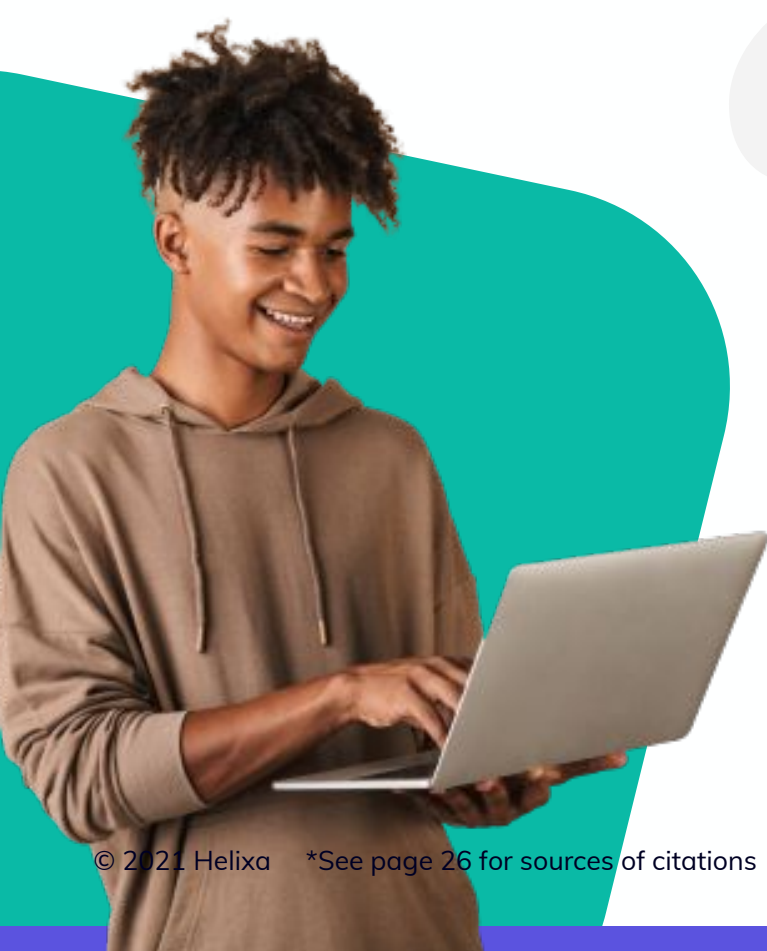
- Social activists
- Human rights, ethnic & identity groups
- Online celebrities
- Strategy games
- Action & adventure games



# Top purchase considerations

## Gen Z & Millennials share some attitudes...

User Behavior	Gen Z	Millennials
Prefer brands that support causes they like... <sup>1</sup>	56%	56%
Prefer brands that they grew up with... <sup>1</sup>	51%	48%
Often seek advice before purchasing... <sup>1</sup>	50%	49%
Tend to make impulse decisions... <sup>1</sup>	48%	46%
Like to connect with brands on social... <sup>1</sup>	38%	35%



*“80% of Gen Zers said they’re more willing to try new brands online than before the pandemic, while **57% said they’re less loyal to brands than before the crisis**, digital experience management software company Sitecore found in a study.”*

**- Robert Williams,  
Marketing Dive<sup>2</sup>**

# Cause-driven & discerning customers

## Top social issues for Gen Z

- 1 Human Rights, Ethnic & Identity Groups
- 2 Religion & Cultural Beliefs
- 3 Charity, Philanthropy & Poverty
- 4 Animal Welfare & Wildlife Organizations
- 5 Medical & Health Organizations



Since the pandemic began, **33% of Gen Z and Millennial consumers have increased online spending, but only 23% of older generations have.**<sup>1</sup>

That same study showed that online marketplaces are seeing a **16 percent increase.**<sup>1</sup> You can't rely on the point of purchase to convey your values if they are buying from third-party sellers, so it's critical that they remain top of mind when your brand is considered.

For example, Savage X Fenty advocates for body positivity by featuring models of all sizes and walks of life on the runway, on the website, and on promotional materials. It's not something they say, it's something they demonstrate. Because of that, consumers will remember those values when it comes time to buy.

# Influencers as Gatekeepers

If we asked you to share the first words that came to mind after hearing “Gen Z,” we’d bet money that “influencer” would be one of your first answers.

Influencer marketing is impossible to divorce from the connected generation. Thanks to their one-to-one relationship with many content creators, they feel more connected and are more likely to follow the lead of the people they follow.

Luckily, you can use that borrowed influence to reach them.

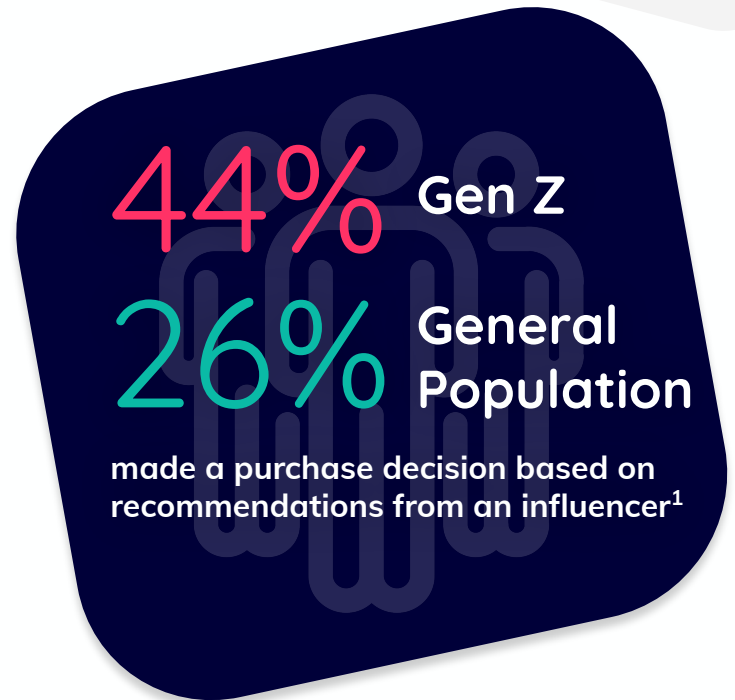


# A generation under the influence

## Trading influence

According to data from Kantar, almost half of Gen Z has made a purchase decision based on recommendations from an influencer. Only a quarter of the general population can say the same.<sup>1</sup>

Influence has become democratized and anyone can now build a following on social platforms. This means there are more opportunities than ever to borrow that influence and use it to connect with the people most likely to buy your products, especially if they belong to this connected generation.



## Trend alert: micro-influence

86% of Gen Z and Millennials are open to posting sponsored content for money, according to Morning Consult.<sup>2</sup> Just look under any viral tweet these days for proof.

This is a trend to watch in the influencer marketing space, and it may play a bigger role as this generation ages.

**“Our clients have seen that a targeted approach to influencers is critical... unless you have a Cristiano-Ronaldo-sized budget”**

— Florian Kahlert, Helixa CEO

# Who's influencing Gen Z?

## Hint: It's not just Gen Z

Only four of our top 10 influencers for Gen Z were actually born into that generation (highlighted in pink below).

This year's ranking leans heavily on musicians and online creators, with a few exceptions. That's an insight that you can use even if you don't have a budget worthy of a Lil Nas X cameo.

This list would differ from a list of, say, the top 10 most followed Instagram accounts, because it's focused only on Gen Z's favorites.

Similarly, your audience has its own specific list of favorite influencers, and a tool like Helixa can help you take a more targeted and strategic approach to influencer marketing.

**78%** of Gen Z follow at least one influencer on social<sup>1</sup>

Rank	Name	Age	Reach	Category
1	Lil Nas X	22	33.2%	Musician
2	Taylor Swift	31	19.8%	Musician
3	Megan Thee Stallion	26	16.8%	Musician
4	Quenlin Blackwell	19	11.3%	Online Creator
5	Brother Nature	22	13.0%	Online Creator
6	LeBron James	36	13.0%	Athlete
7	Chris Evans	40	12.8%	Actor
8	Beyoncé	39	12.2%	Musician
9	Kanye West	44	11.5%	Musician
10	Demetrius Harmon	23	11.3%	Online Creator

**NOTE:** The list is sorted by reach and filtered for an affinity of 1.20x and up

# INFLUENCERS AS GATEKEEPERS

## Who's influencing Gen Z?

### The influencers engaging Gen Z online

Influence changes. Trends are moving faster. Last years trend is not enough.

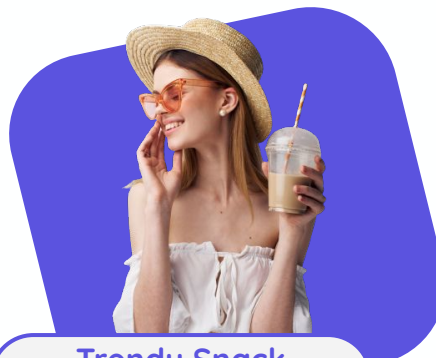
**NOTE:** The list is sorted by reach and filtered for an affinity of 1.20x and up



**Entertainment Fanatics**

#### Top Influencers

- Lil Nas X
- Taylor Swift
- Megan Thee Stallion
- Quenlin Blackwell
- Beyoncé



**Trendy Snack Lovers**

#### Top Influencers

- Taylor Swift
- Lil Nas X
- Quenlin Blackwell
- Megan Thee Stallion
- Ethan Dolan



**Competitors**

#### Top Influencers

- LeBron James
- Lil Nas X
- Adrian Wojnarowski
- Rob Perez
- Patrick Mahomes II



**Dedicated Gamers**

#### Top Influencers

- Markiplier
- Dr Disrespect
- MrBeast
- Ethan Klein
- Lil Nas X



**Activists**

#### Top Influencers

- Alexandria Ocasio-Cortez
- Lil Nas X
- Bernie Sanders
- Hillary Clinton
- Barack Obama

# INFLUENCERS AS GATEKEEPERS

## Influence goes both ways

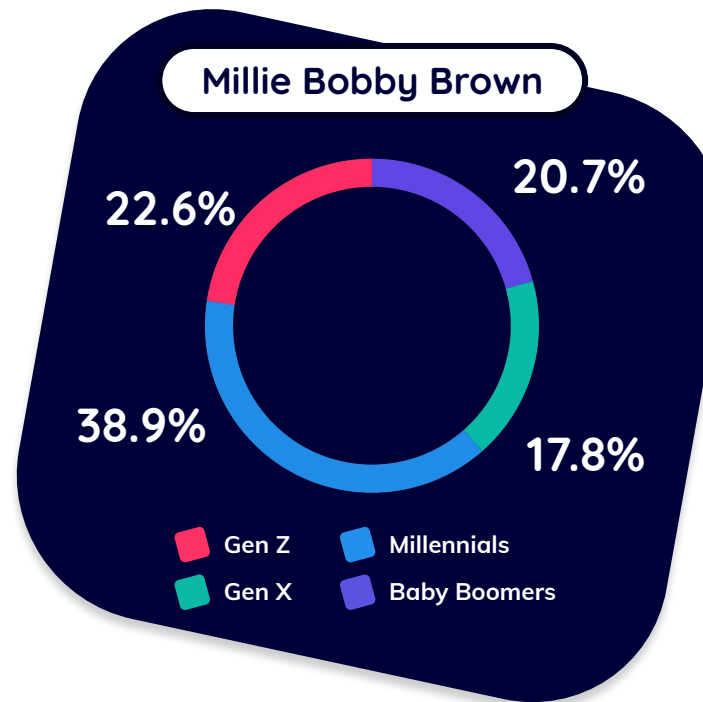
### Gen Z shapes pop culture

Charli D'Amelio is making cameos in high-profile music videos from artists like Jennifer Lopez.

Addison Rae is teaching Tik Tok dances to the Kardashians.

And Gen X influencers like Tabitha Brown are building audiences on the same platform after getting tutorials from their children.

The influence of Gen Z's hottest talent doesn't stop with their peers.



Many Gen Z influencers and celebrities reach a wide range of audiences, like Millie Bobby Brown of Stranger Things, whose audience spans all four generations.

Not to mention Gen Z's impact on the Billboard Top 40, streaming company offerings, social media discussions, and pop culture, more broadly.

Gen Z is pushing boundaries and bringing us with them. From genderless clothing to Tik Tok, many trends driven by Gen Z are making their way into the mainstream.

Even if you don't market to Gen Z directly, that's reason enough to pay attention.

# Where To Find Gen Z

Gen Z is harder to reach than any other age group. Their interests are quite wide-ranging, as a generation, and spread across various formats, creators, and channels.

However, most still have favorites they return to again and again. We've included this generation's top shows, websites, and games to get you started.

Then, to take a more strategic approach, use a tool like Helixa to understand the top influencer choices of the Gen Z segment of your specific audience. This approach will drive much better results.

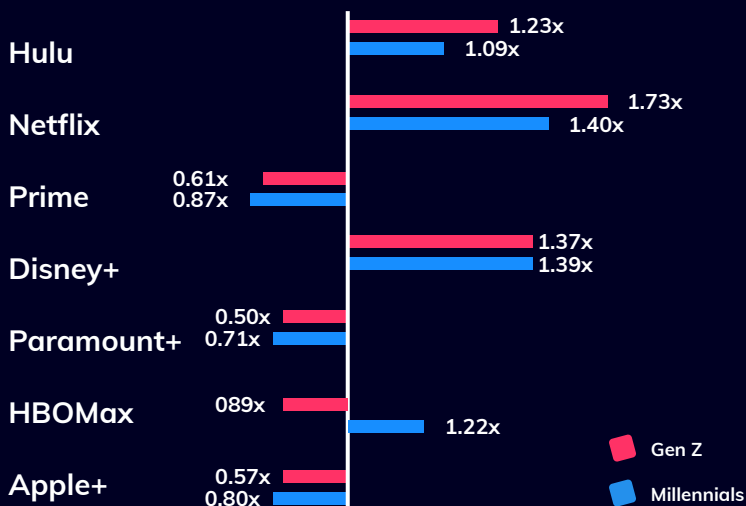




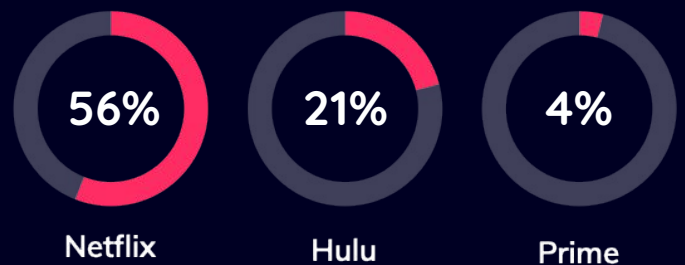
# Changing entertainment choices

Half of Gen Z said they weren't going to watch the Super Bowl in 2020<sup>1</sup> but they spend 10.6 hours a day engaging with online content<sup>2</sup>

## Gen Z engagement index



## Gen Z watched in the last 30 days<sup>3</sup>



\*\*At the time of the survey, and only for available services

29% Spend More Time Playing Video Games than Watching TV<sup>3</sup>  
14%

## Reaching Gen Z

In a 2019 study, Gen Z and Millennials expressed a higher tolerance to advertising than older generations.<sup>4</sup>

That's huge. **Not only are Gen Z open to connecting with you online, they are more willing to watch your ads too.** There are so many opportunities to reach them directly.

The key is finding the **right** opportunities to connect with **your specific audience**. But first, let's take a look at Gen Z's favorite shows, overall.

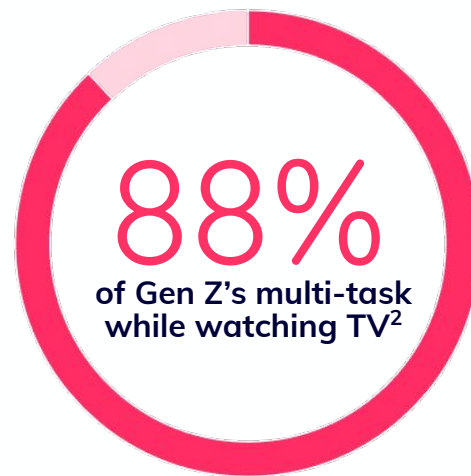
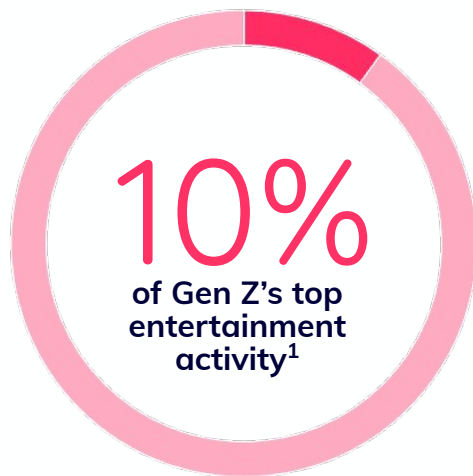


## WHERE TO FIND GEN Z

# When they're streaming...

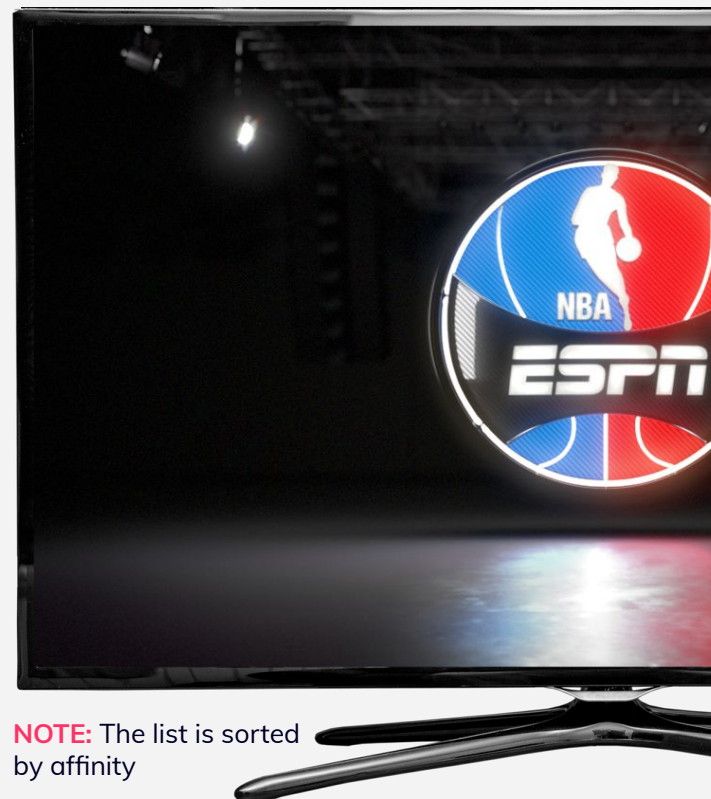
### Enduring content formats meet changing habits

In 2021, Gen Z ranks watching TV and movies as their **fifth favorite** entertainment activity and **only 10%** put it as their favorite.<sup>1</sup> When they do watch, they're multitasking.<sup>2</sup>



### Gen Z's most engaging shows

- |                         |                |
|-------------------------|----------------|
| 1 Victorious            | 2 Teen Wolf    |
| 3 The Fosters           | 4 Girl Code    |
| 5 Spongebob Squarepants | 6 Riverdale    |
| 7 Rick and Morty        | 8 The X Factor |
| 9 Stranger Things       | 10 The Office  |



**NOTE:** The list is sorted by affinity

# When they're streaming... (cont.)

## The shows engaging Gen Z online

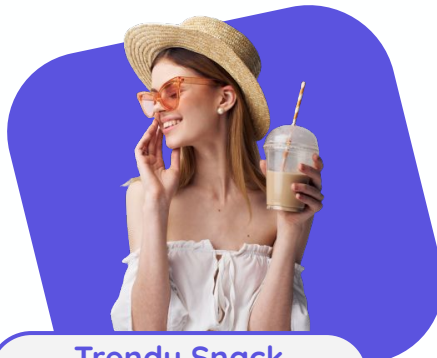
NOTE: The list is sorted by affinity



Entertainment Fanatics

### Top Shows

- Teen Wolf
- Victorious
- The Fosters
- Degrassi: The Next Generation
- Pretty Little Liars



Trendy Snack Lovers

### Top Shows

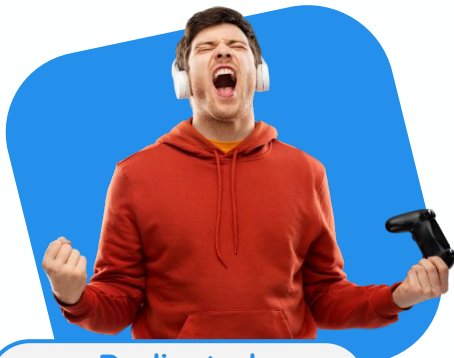
- Degrassi: The Next Generation
- Victorious
- The Secret Life of the American Teenager
- The Fosters
- Baby Daddy



Competitors

### Top Shows

- SportsNation
- NBA on ESPN
- NBA on TNT
- Get Up
- First Things First



Dedicated Gamers

### Top Shows

- Dr. Stone
- KonoSuba
- Re:Zero
- Black Clover
- Invincible



Activists

### Top Shows

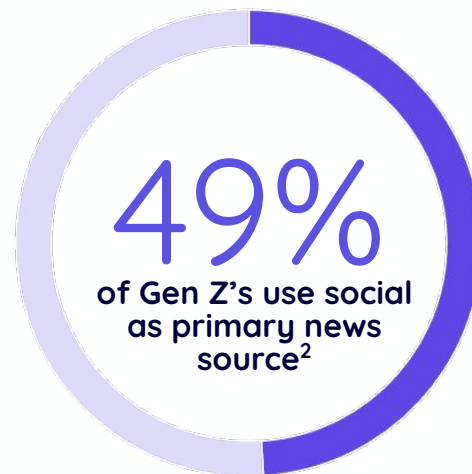
- BoJack Horseman
- Avatar: The Last Airbender
- Parks and Recreation
- Broad City
- Last Week Tonight with John Oliver

## WHERE TO FIND GEN Z

# When they get online...

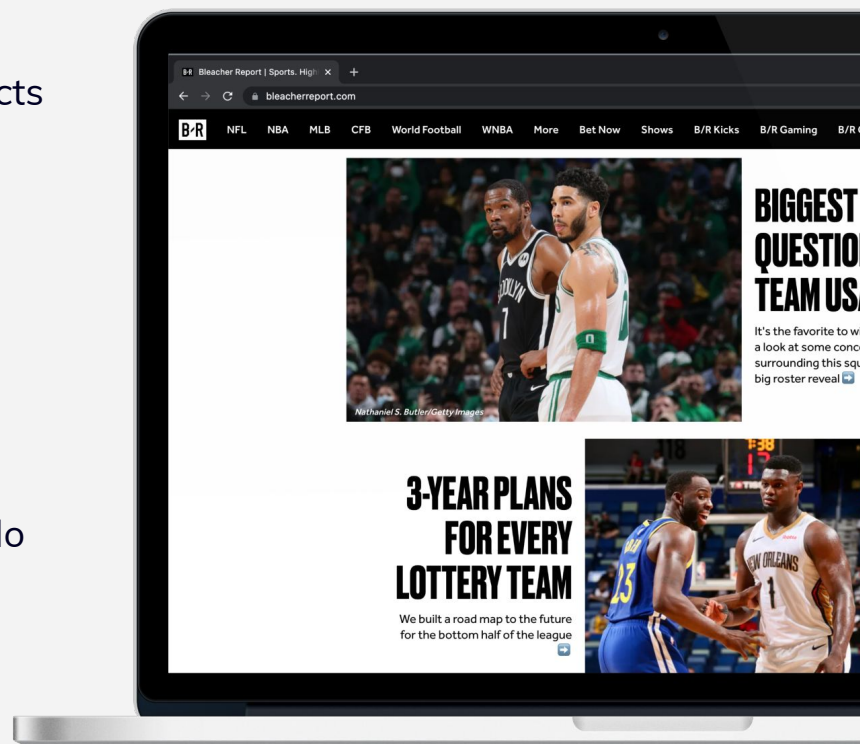
## The topics don't change, but the sources do

74% of Gen Z say they spend their free time online and 66% are browsing with more than one device at a time.<sup>1</sup> Also, 49% of Gen Z use social media as a primary news source, compared to 17% of other adults.<sup>2</sup>



## Gen Z's most engaging websites

- |                   |                |
|-------------------|----------------|
| 1 Bleacher Report | 2 UberFacts    |
| 3 Barstool Sports | 4 Hoop Central |
| 5 Chart Data      | 6 IGN          |
| 7 Men's Humor     | 8 Nintendo     |
| 9 Overtime        | 10 AJ+         |



# When they get online... (cont.)

## The websites engaging Gen Z online

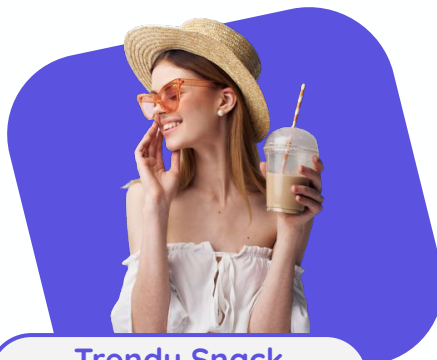
**NOTE:** The list is sorted by reach and filtered for an affinity of 1.20x and up



**Entertainment Fanatics**

### Top Websites

- NowThis
- UberFacts
- The Dodo
- Chart Data
- Bleacher Report



**Trendy Snack Lovers**

### Top Websites

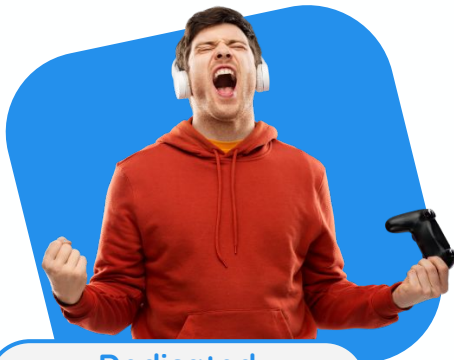
- NowThis
- UberFacts
- Bleacher Report
- Chart Data
- Nintendo



**Competitors**

### Top Websites

- Bleacher Report
- Hoop Central
- Barstool Sports
- Overtime
- Ballislife



**Dedicated Gamers**

### Top Websites

- Nintendo
- IGN
- UberFacts
- Barstool Sports
- Hoop Central



**Activists**

### Top Websites

- The Onion
- The Hill
- NowThis
- The Obama White House Archive
- BuzzFeed

# Connected through gaming

**\$180B** opportunity within the gaming industry today<sup>1</sup>    **20%** increase in growth skyrocketing in 2020<sup>1</sup>

The longstanding stereotype of gamers as basement dwelling loners couldn't be further from the truth in 2021. The rise of online gaming allows for a social element, and eSports draw major crowds like top sporting events.

*“Many people are using video game platforms similar to social media websites. People can communicate, strategize and forge relationships in a much more meaningful way. Some people develop lifelong friendships from video gaming platforms.”*

- Matt Schmidt, Forbes<sup>1</sup>

## Gen Z's most engaging online games by category

- 1** **Strategy Games**  
No. 1: Minecraft
- 2** **Sports Games**  
No. 1: NBA 2K
- 3** **Shooter Games**  
No. 1: Call of Duty
- 4** **Action & Adventure Games**  
No. 1: Fortnite
- 5** **Beat-Em-All Games**  
No. 1: WWE 2K

**NOTE:** The list is sorted by reach and filtered for an affinity of 1.20x and up



# Connected through gaming (cont.)

## The games engaging Gen Z online

Gaming is a great way to segment Gen Z into tribes.

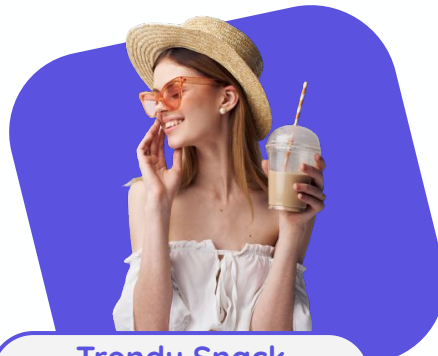
**NOTE:** The list is sorted by reach and filtered for an affinity of 1.20x and up



**Entertainment Fanatics**

### Top Games

- The Sims
- Overwatch
- Pokémon
- Animal Crossing
- League of Legends



**Trendy Snack Lovers**

### Top Games

- Pokémon
- Just Dance
- Animal Crossing
- Call of Duty
- The Sims



**Competitors**

### Top Games

- NBA 2K
- Call of Duty
- Fortnite
- Apex Legends
- Madden NFL



**Dedicated Gamers**

### Top Games

- Call of Duty
- Pokémon
- Destiny
- Minecraft
- Assassin's Creed



**Activists**

### Top Games

- Pokémon
- Animal Crossing
- League of Legends
- Fallout
- Sonic the Hedgehog



*"We find the insights we get from Helixa so valuable, we use it on **every single project.**"*

- **Concept Arts**

*"It would take **multiple tools** to replace the deeper insights I can uncover with Helixa."*

- **VMLY&R**



## Your fans are unique...

Our goal with this report was to give you a clearer, data-supported view of Gen Z — and a head start over the companies who aren't even targeting this generation.

But general insights only get you so far. As you saw with the five Gen Z segments, things can change a lot once you start getting specific.

**To understand your audience, you need insights that center your audience. We can help.**

## ...and so is Helixa

Helixa is a data-driven, audience intelligence platform that helps media companies, brands and their agencies identify new opportunities and pathways to growth.

The results are incredibly nuanced, timely and meaningful insights that inform creative, planning, and execution to reach your target audiences.

**If you're ready to spend less time searching, give us a call.**

[SCHEDULE A DEMO](#)



LEARN MORE

# Insights in minutes, not hours

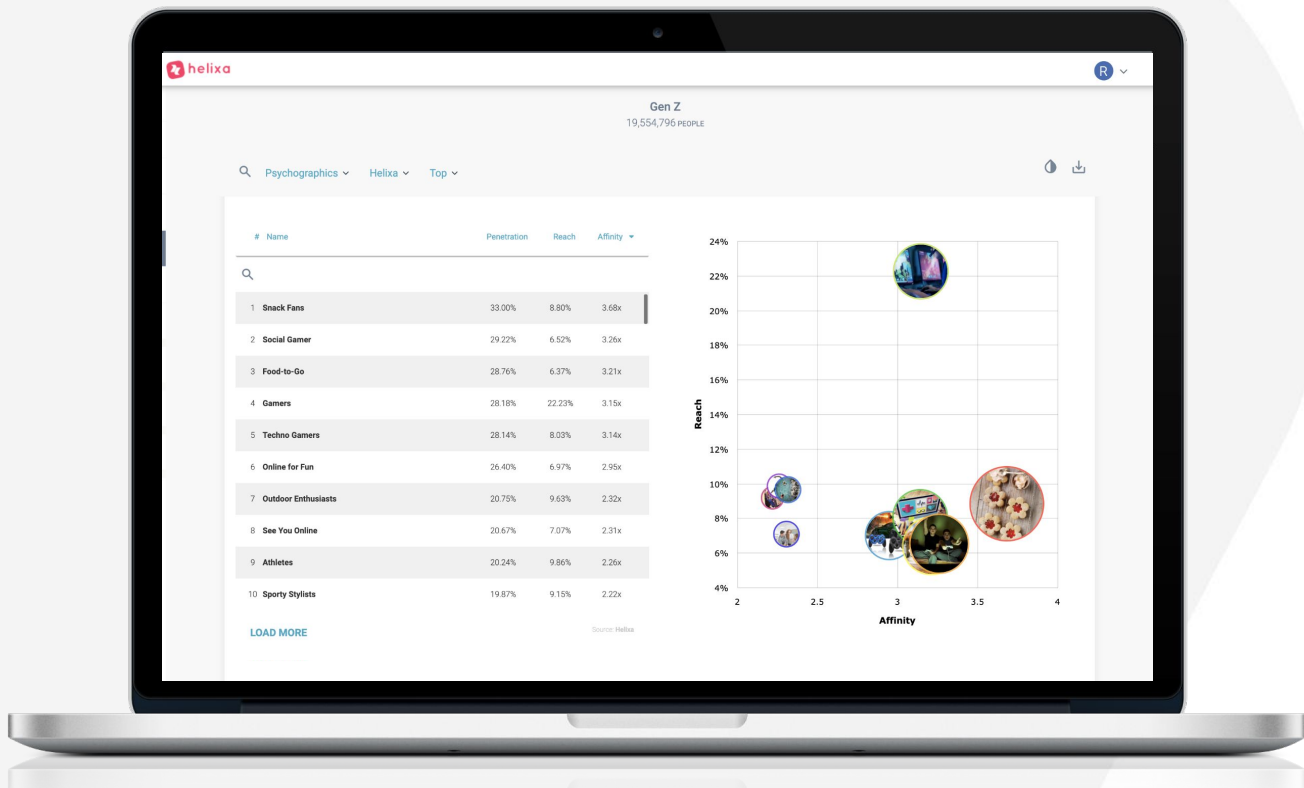
## Methodology

Helixa observes real-time social media interactions of millions of consumers, and applies machine-learning algorithms to calculate consumer interests and affinities.

Our consumer data is calibrated against the latest U.S. Census studies (ACS and CPS) to ensure that all the analyses reflect a picture of the real world. Our goal is to create the most accurate representation of the U.S. consumer.

We also overlay the survey data from MRI and Simmons Research to provide a deeper understanding about the American consumer's consumption habits, opinions and attitudes.

The analysis for this report was conducted using Helixa Discovery in Q2 2021 using the Gen Z demographic category as the audience..



# Additional Resources

All uncited data was gathered using the Helixa Discovery platform:  
Helixa Discovery Platform - Interest and Affinity Graph 2021

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### Introduction - pg. 2

- 1: Forbes 2016, "[Generation Z: 10 Stats From SXSW You Need To Know](#)"
- 2: Google Trends, 2021

### A \$323 billion opportunity - pg. 3

- 1: Cassandra 2019, survey of Gen Z in U.S. and UK
- 2: MRI Survey of the American Consumer - 2021 Doublebase Study via Helixa Total Consumer View; Insights Fusion 1
- 3: National Retail Federation 2019, "[Consumer View Fall 2019](#)"

## GETTING GEN Z'S ATTENTION - PG. 4

### Getting Gen Z's attention - pg. 4

- 1: Forbes 2016, "[Generation Z: 10 Stats From SXSW You Need To Know](#)"

### Ready to connect... for now - pg. 5

- 1: Simmons National Consumer Study 2021 - Helixa Total Consumer View; Insights Fusion 3
- 2: MRI Survey of the American Consumer - 2021 Doublebase Study via Helixa Total Consumer View; Insights Fusion 1
- 3: CrowdDNA 2018, "Trends 2.0"

### Top purchase considerations- pg. 9

- 1: MRI Survey of the American Consumer - 2021 Doublebase Study via Helixa Total Consumer View; Insights Fusion 1
- 2: Marketing Dive 2021, "[Brands could lose fickle Gen Zers over poor digital experiences](#)"

### Cause-driven & discerning customers- pg. 10

- 1: BCG 2020, "[How Marketers Can Win with Gen Z and Millennials Post-COVID-19](#)"

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- 1: Marketing Dive 2020, "[Gen Z relies on influencers for purchase decisions, Kantar says](#)"
- 2: Morning Consult, "[The Influencer Report: Engaging Gen Z and Millennials](#)"

### Who's influencing Gen Z - pg. 13

- 1: Morning Consult, "[The Influencer Report: Engaging Gen Z and Millennials](#)"

## WHERE TO FIND GEN Z - PG. 16

### Changing entertainment choices - pg. 17

- 1: MediaPost 2020, "[Half of Gen Zers Won't Watch Super Bowl, Some Will Use Social Media](#)"
- 2: Marketing Tech 2018, "[Gen Z engaging with 10 hours of online content a day](#)"
- 3: Simmons National Consumer Study 2021 - Helixa Total Consumer View; Insights Fusion 3
- 4: MediaPost 2019, "[Gen Z, Millennials Have Higher Tolerance For TV Ads, Study Finds](#)"

### When they're streaming - pg. 18

- 1: Variety 2021, "[Gen Z Ranks Watching TV, Movies as Fifth Among Top 5 Entertainment Activities](#)"
- 2: Decision Lab, "[Yes, the Internet is redefining Gen Z's TV habits](#)"

### When they get online - pg. 20

- 1: IBM Institute for Business Value, "[Uniquely Generation Z](#)"
- 2: Morning Consult, "[Understanding Gen Z](#)"

### Connected through gaming - pg. 22

- 1: Forbes 2021, "[Why The Gaming Industry Could Be The New Social Media](#)"