

WARC Media

Global Ad Trends

Finding Gen Z

Sample report



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In this report

Generation Z is the world's most digital audience yet.

Commonly agreed to be those aged between 13 and 25, in this report our focus is on Gen Z consumers aged 16 or older. These individuals spend vast quantities of time with social media and platforms like TikTok.

However, increases in their online consumption have been driven by the creation of new media opportunities throughout the day – such as music and podcast streaming – rather than digital innovations fully supplanting offline channels. The key challenge facing marketers is that these platforms and channels are often those with the most under-developed advertising proposition.

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Chapter 1

Finding Gen Z



Gen Z is the most digital audience to date

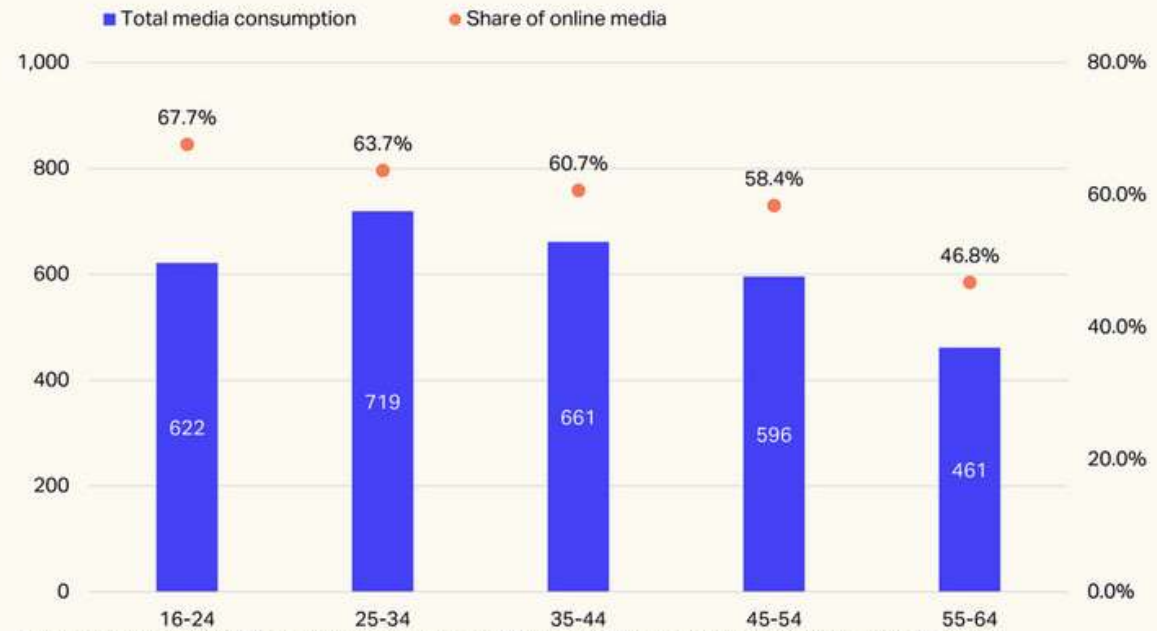
Generation Z (commonly defined as those aged 13-25, though our focus is on consumers aged 16 or older) is the most digital demographic in its media consumption habits that the world has seen so far.

While in overall consumption terms (i.e. the total daily average minutes spent consuming audio and visual media content) Gen Z may lag behind older Millennials and Gen X audiences, two-thirds (67.7%) of the media they do consume is through online channels and platforms – a higher percentage than seen among all other age groups.

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Global, Media consumption, Q2 2022

Minutes, daily average; %, share



Note: Figures from Q2 2022. Online media includes social media, online press, online TV/Streaming, music streaming, podcasts.

SOURCE: WARC Media, GWI

Reaching Gen Z is a unique brand challenge

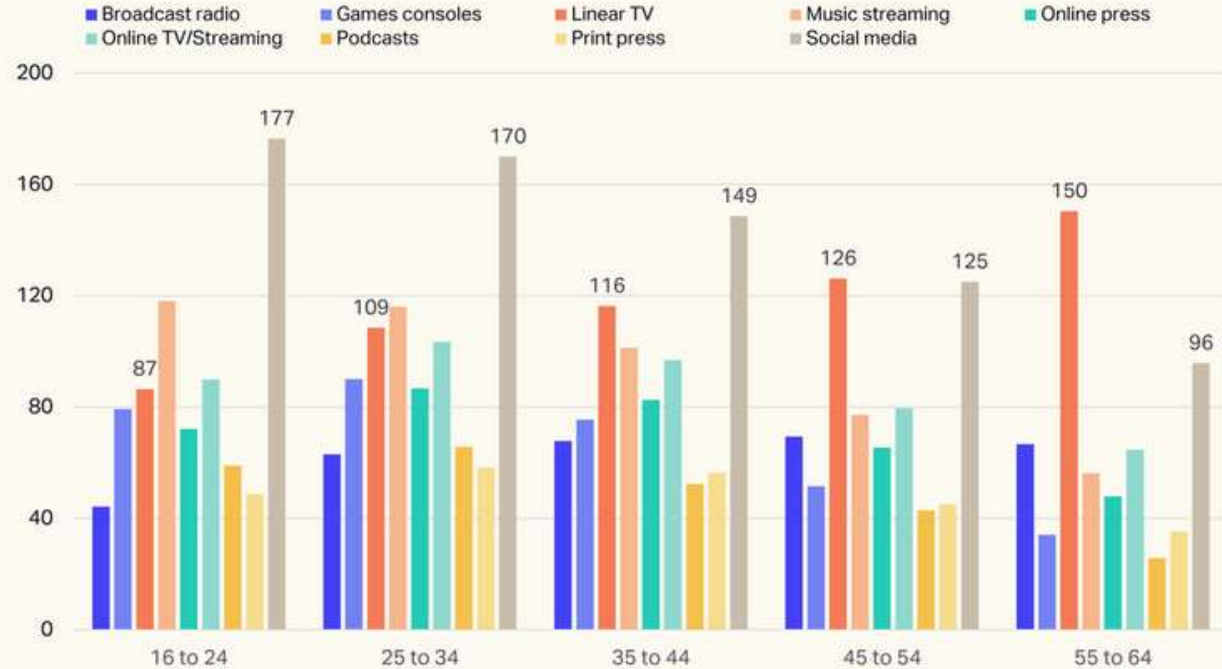
One of the hurdles facing brands is that the channels being consumed most by 16-24s – from music streaming to video games – are often those with the most under-developed advertising proposition.

With consumption of media like linear TV and broadcast radio lagging behind that of older generations, this has amplified the importance of social media as a driver of reach among Gen Zs. In particular, TikTok has emerged as the platform of choice for brands wishing to engage with young adults and teens.

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Global, Media consumption, 2023(f)

Minutes, daily average



SOURCE: WARC Media, GWI

Gen Z's audio streaming habits are evolving

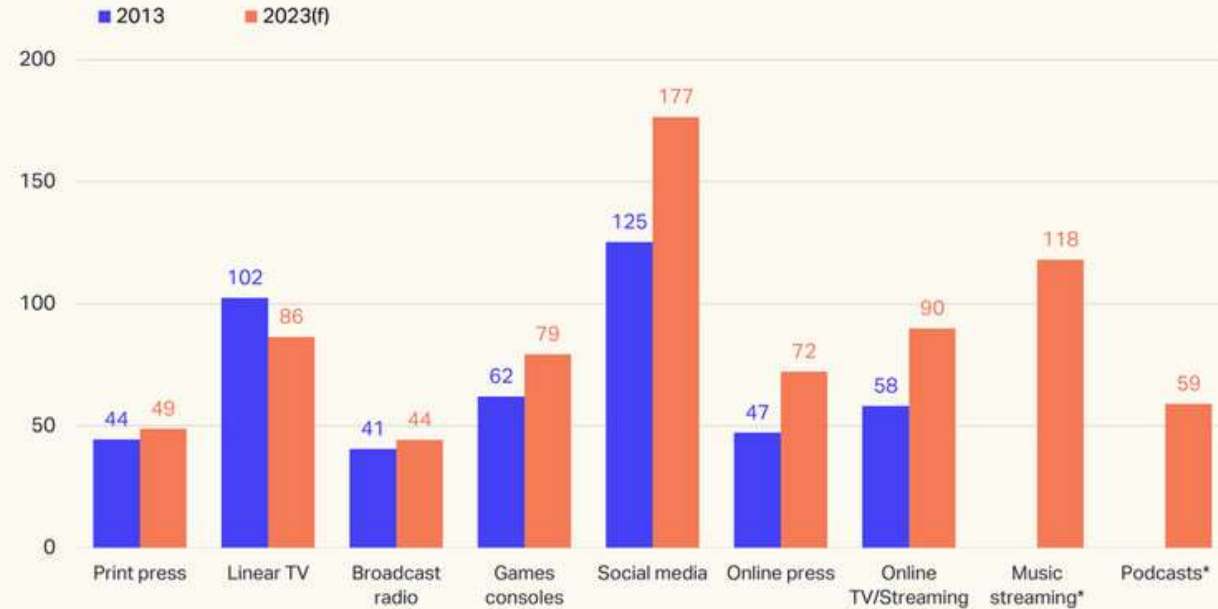
Audio channels play a key role in Gen Z media consumption. Fuelled by music streaming and podcast listening, and the growth of platforms like Spotify, 16-24s globally consume more professionally-produced audio content per day than all forms of TV viewing combined.

All regions bar APAC have seen triple-digit growth in daily average online audio media consumption among Gen Z listeners since 2017 – most noticeably Latin America (+130%), Europe (+129%) and North America (+105%).

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Global, Media consumption, 16 to 24s

Minutes, daily average



Note: Figures for 2023 are WARC forecasts. Music streaming and podcast consumption data were not available until 2017 and 2020 respectively.

SOURCE: WARC Media, GWI

Social platforms must battle for Gen Z attention

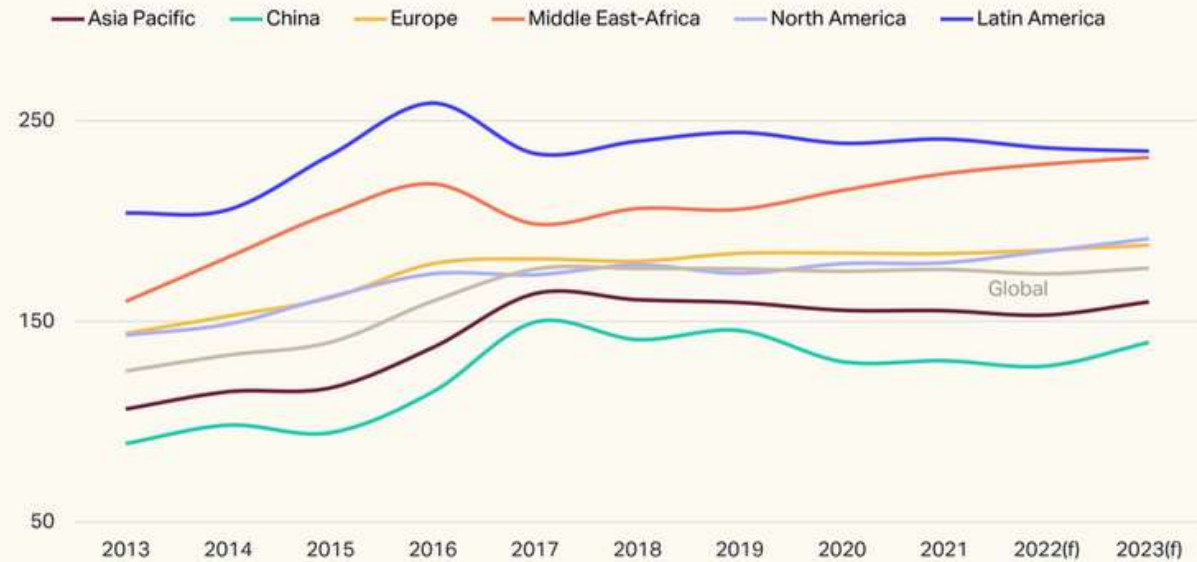
Social media leads the charts for consumption by 16-24s across all regions. However, growth in total global social usage levelled off in 2017, and is even forecast to dip slightly (-0.5%) year-on-year in 2022. This means that platforms find themselves battling to win share of Gen Z's finite attention, with any gains by platforms like TikTok or BeReal likely to be at the expense of other apps.

The volume of social usage varies significantly, with Latin America topping the ranking and China's 16-24s spending the least time with social media each day.

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Global, Social media consumption

Minutes, daily average, 16 to 24s



Note: Figures for 2023 are WARC forecasts. Figures for 2022 are computed by combining actual Q1 and Q2 figures, and Q3 and Q4 forecasts.

SOURCE: WARC Media, GWI

Chapter 2

What it means for brands



1. Gen Z favour authenticity over curation in brand content

While Millennial media habits have been defined by curated, image-led social platforms, Gen Z users are more drawn towards video-first apps such as TikTok.



Central to this preference, argues Acacia Leroy, Head of Trends at Culture Group, is a desire for authenticity – and a backlash against those creators and marketers deemed to be falsifying their own views and brands.

"Image-centric platforms really paved the way for staging, with inauthentic content at the forefront," said Leroy. "The spontaneity of video means that Gen Z can capture moments as they happen."

Take for instance the rapid rise of BeReal. Each day at a different time, the mobile app will ask its users to simultaneously share a photo within two minutes of the notification.

With over 10 million users, BeReal's growing popularity has been fuelled by the perceived unfiltered (and sometimes outright mundane) nature of the content, which represents the polar opposite of preened, artificial Instagram imagery. See also Poparazzi, an 'anti-selfie' app which demands its users share photos of "candid" and "intimate" moments.

"Being the first generation to grow up with social media throughout our formative teenage years, many of us older Gen Zs have come out the other side with a heightened awareness about the dangers of platforms [and the] duplicity of self, where there is a misalignment

between your real self and your digital self," said Sammi Huang, a Client Executive at Dentsu's digital marketing agency iProspect.

This desire to express one's "real" self has led to Gen Z users being much more likely to contribute to platforms like TikTok as creators, in comparison to "more passive" older generations.

A restless pursuit of self-expression extends beyond video and into channels like audio, where Gen Z listeners have been found to be more likely to use music streaming and podcasts to "understand themselves better", according to research by Spotify.

Chapter 3

Latest market intel



Global

Search ad spend set to overtake total premium video in 2023

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Consumers favour 'useful' Amazon ads, but marketers prefer Instagram

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Technology and electronics sector is forecast to lead ad growth this year and next

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TikTok revenues to grow 41.5% as social media companies face \$40bn shortfall in 2023

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Disney overtakes Netflix in total subscriptions as SVOD streaming wars continue

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Meta, Twitter Q2 2022 ad revenue growth stalls, while Spotify continues to climb

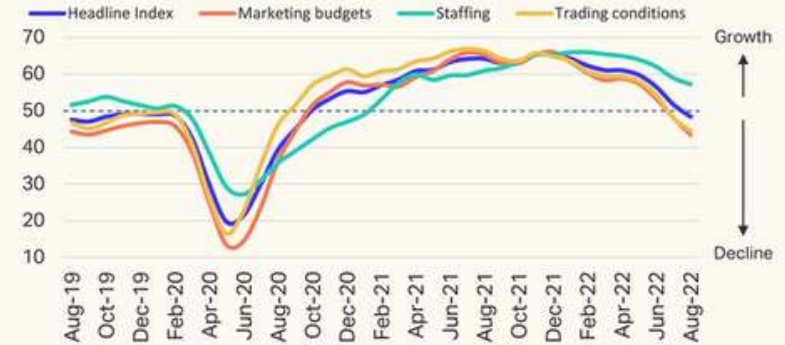
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Generation Twitch accepts brands if they are authentic

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Netflix CPMs emerge

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Note: Media breakdown is change in marketing budgets.

SOURCE: WARC Data [Global Marketing Index](#)

Europe, Middle East and Africa

Western Europe to add 73 million SVOD subscriptions by 2027, driven by Disney+ sign-ups

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IT sector powers UK women's sports front-of-shirt sponsorship

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Are European telcos harnessing digital audio's full potential?

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German consumers look to smart tech to help with energy costs

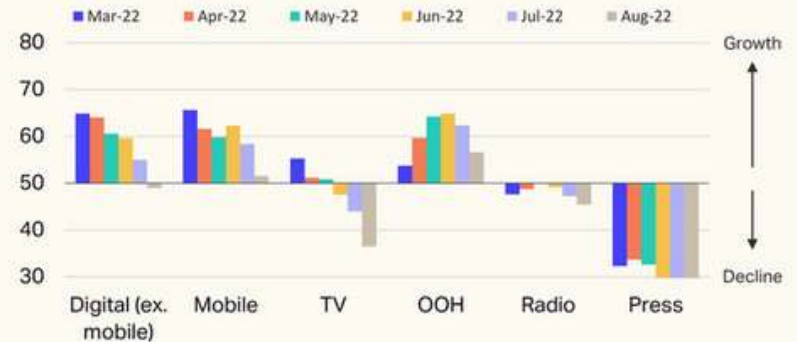
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The devalued pound and what it means for advertising

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UK consumer confidence hits a new record low

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Note: Media breakdown is change in marketing budgets.

SOURCE: WARC Data [Global Marketing Index](#)

Asia Pacific

Online audio consumption to grow 7% among young Australians in 2023

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China's Gen Z internet users grow to 342 million, consuming seven hours of online media per day

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APAC social media adspend up 7% in Q2

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Southeast Asia is new focus for TikTok Shop

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India OOH evolves post-Covid

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The attention economy: How Australian viewers are watching TV and BVOD

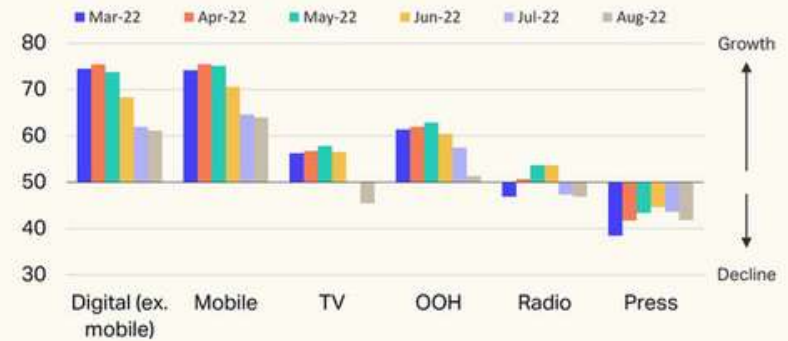
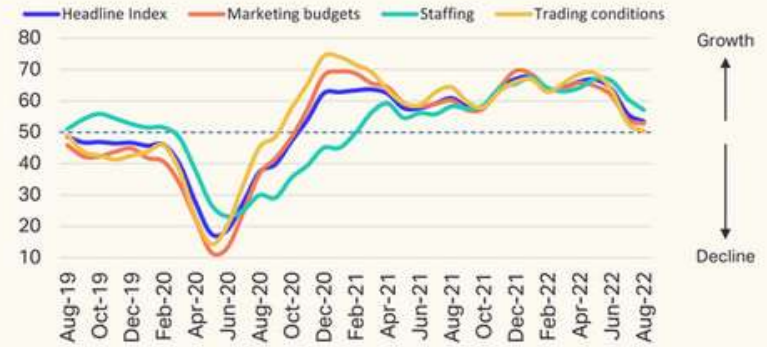
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The ultra-viral mobile game tracing 'hard fun' trend among China's Gen-Z

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Guochao is here to stay

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Note: Media breakdown is change in marketing budgets.

SOURCE: WARC Data [Global Marketing Index](#)

Americas

95% of US teens use YouTube while Facebook teen usage falls 39%
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Global podcast consumption on the rise with North America forecast to grow 75%
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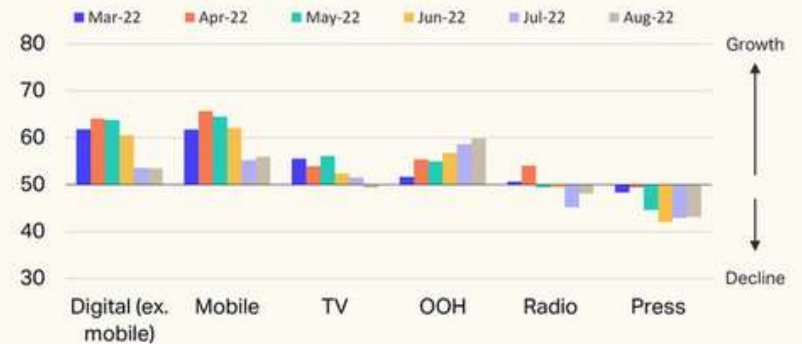
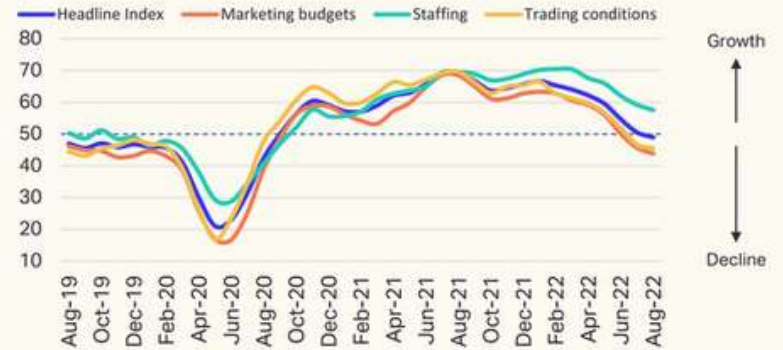
Super Bowl ad sales hint at commercial confidence
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In Brazil, mixing brands and politics is often unavoidable
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Brazilian brands involved with the World Cup should play to win
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US discretionary spend set to bounce back in 2023
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Apple's iOS used by majority of Americans for first time since launch
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Note: Media breakdown is change in marketing budgets.

SOURCE: WARC Data [Global Marketing Index](#)



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