

TECHNOLOGY HABITS OF GEN Z – GERMANY – 2022

Gen Z rely on a wide range of social media platforms and use them for a variety of purposes. While this presents significant opportunities, brands also need to address the negative effects of social media, eg by taking a strict stance against cyber-bullying.



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Technology Habits Of Gen Z - Germany - 2022

This report looks at the following areas:

- The short-, medium- and long-term impact of COVID-19 on Generation Z and their behaviours regarding technology
- Activities Gen Z pursue on a typical weekday that involve technology including the time they spend with these activities
- Ways Gen Z are most likely to get the next technology device they'd like to own
- Social media platforms used
- Reasons for using social media
- Behaviours regarding social media and technology, including interest in refurbished devices

Overview

A staggering **96% of Gen Zs** use social media on a typical weekday and **42%** of Gen Z social media users say they value social media more now than before the COVID-19 outbreak. Despite their troubled relationship with social media, this points to an overall pronounced usage longer term. However, the social media landscape is evolving rapidly with changing and **varying cultures** between platforms. To keep **meeting the zeitgeist** with one's marketing, brands need to tap into the knowledge of influencers and consider them as strategic partners.



Gen Z rely on a wide range of social media platforms and use them for a variety of purposes. While this presents significant opportunities, brands also need to address the negative effects of social media, eg by taking a strict stance against cyber-bullying.

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While social media is a valued tool for Gen Z, their high screen time sees them experiencing the negative effects that come along with it. **78% of Gen Zs** think cyber-bullying is a serious issue for people their age and 65% of Gen Z feel like they spend too much time online in their free time. This opens opportunities for brands to help their audience with a healthy social media usage, for example by launching digital wellbeing campaigns in collaboration with influencers.

39% of Gen Z* like to be among the first to try new technologies, but their limited spending capacity gives them less leeway to buy the devices they want. **48% of Gen Zs** are interested in buying refurbished devices and 40% see renting technology devices as a good alternative to buying them, giving brands leverage to account for their limited budgets while addressing their ethical orientation.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview

The impact of COVID-19 on Generation Z's technology habits

- COVID-19's impact on German Generation Z's consumer behaviour

Market context

- Generation Z is characterised by their digital consumption...
- ...and limited spending capacity
 - Graph 1: net monthly household income, by generations, 2021

Opportunities

- Help Gen Z with healthy social media usage...
- ...particularly when targeting female Gen Zs
- Prove your ethical commitment...
- ...by leveraging the reach of social media
- Target Gen Z with refurbished devices...
- ...and devices for rent...
- ...by underscoring the environmental benefits
- Quick download resources

MARKET DRIVERS

- COVID-19: market context
- The impact of COVID-19 on the German economy
 - Graph 2: key economic data, in real terms, 2019-23
- The impact of the economy on Generation Z

Demographic overview

- Graph 3: breakdown of the population by generation, 2019
- Generation Z are characterised by limited spending capacity
 - Graph 4: net monthly household income, by generations, 2021

Digital consumption

- Online media consumption surges among younger Germans...
 - Graph 5: online media consumption (in mins), by age, 2018-20

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- ...along with mental wellbeing concerns

Ethical orientation

- Generation Z are driven by ethical values
- Billie Eilish x Telekom address the ethical values of Generation Z

WHAT CONSUMERS WANT AND WHY

Technology device ownership

- Gen Z are well-equipped with tech devices...
 - Graph 6: technology devices personally owned, by generation, 2021
- ...leading with ownership of gaming equipment
- Adapt to Generation Z's usage preferences
- Gen Z are inclined towards mobile
 - Graph 7: Gen Z's preferred devices for digital activities, 2021
- Put mobile first

Ways to get the next owned technology device

- Gen Z rely on their own money when buying tech
 - Graph 8: ways Gen Z are most likely to get the next owned technology device, 2021

Technology activities

- Gen Z's days are packed with digital activities...
 - Graph 9: activities done on a typical weekday by Gen Z, NET, 2021
 - Graph 10: time Gen Z typically spend on activities on a weekday, 2021
- ...led by social media...
- ...making it key to engage Gen Z
- Tap into podcasts for audio advertising...
 - ...but make the ads as organic as possible
 - Maximise your ad impact by tapping into influencer podcasts
- Video games are highly popular among Gen Z
- Increase your visibility in the virtual world
- Balenciaga leverages Gen Z's propensity for video games
- Help Gen Z to share experiences digitally
- Cross-sell mindful offline experiences

Social media platforms used

- Long-standing as well as emerging social media platforms are popular among Gen Z
 - Graph 11: social media platforms used at least once a week, by generation, 2021
- Tap into the breadth of platforms used by Gen Z

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- Social media landscape to evolve quickly
- Take advantage of the knowledge of influencers
- Keep an eye out for Snapchat's advancing AR potential...
- ...to aid Gen Z's online shopping experience
- Engage male Gen Zs with live events on Twitch

Reasons for using social media

- Social media is Gen Z's digital Swiss Army Knife...
 - Graph 12: Gen Z's reasons to use social media, 2021
- ...presenting opportunities for brands to step up their social media game
- Embrace ads that inspire
- Leverage user-generated content
- Utilise social media to allay quality concerns
- Harness the power of social media for your product development

Behaviours regarding social media & technology

- Gen Zs struggle with a wide range of internet-related concerns...
 - Graph 13: Gen Z behaviours regarding digital consumption & social media, 2021
- ...providing opportunities for brands to help with a healthy internet usage
- Act on cyber-bullying...
 - ...through advanced verification and strict policies
- Give Gen Z more control over what they see on social media...
 - ...by implementing wellbeing filters
- Help Gen Z with healthy social media usage
- Use digital wellbeing campaigns to resonate with Gen Z
- Cadbury Dairy Milk India serves as a source of inspiration for the German market to fight cyber-bullying
- Female Gen Zs have a particularly troubled relationship with social media...
 - Graph 14: Gen Z's behaviours regarding technology, by gender, 2021
- ...providing opportunities for female-focused brands to win their sympathy
- Gen Z are all about parallel device usage
 - Graph 15: Gen Z's behaviours regarding technology, 2021
- See second screen usage as an opportunity...
 - ...by embracing cross-channel engagement
- Target Gen Z with refurbished devices
- Appeal to Gen Z with devices for rent...
 - ...and underscore the environmental benefits
- Allow Gen Z to use your brand to express their identity
- Embrace an ethical branding to resonate with Gen Z...
 - ...but go hard on proving your commitment

LAUNCH ACTIVITY AND INNOVATION

- YouTube testing shopping feature
- Instagram is raising its safety standards for teenage users

APPENDIX

Appendix – abbreviations, consumer research methodology and language usage

- Abbreviations
- Generational groups in Germany
- Consumer research methodology
- A note on language

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