

# GEN Z

## THE CULTURE OF CONTENT CONSUMPTION



### METHODOLOGY:

We began this project by speaking with content creators across industries who identified the complex challenges and strategies for capturing Gen Z's attention. Using these learnings, we then conducted an online survey among 650 VICE audience members in Ontario, Canada - 500 people ages 14-22 (Gen Z) with an additional 150 people ages 23-39 (Millennials) for comparison. Throughout the report we have called out where differences exist between generations.

This research was conducted in August 2019 by VICE Media in partnership with Ontario Creates.



# Gen Z lives in a world fueled by media and infused with content.

- This is vital to who they are and who they will become. This generation considers pop culture and media to have a significant impact on their identity. In this research, we set out to understand how Gen Z discovers, consumes and shares the content that is so essential to their lives. We focused specifically on cultural content, meaning film and TV, art, lifestyle, gaming, music, literature, etc., not politics or hard news. This content can take many forms—from written stories to narrated videos to social posts and stories. Cultural content can be produced by individuals or by companies.

1  
in  
2

Believe pop culture and media have a bigger impact on their sense of gender and/or sexual orientation than the culture they grew up with

# Representation Is Required In A World Where Originality Reigns Supreme

There is a strong desire for original cultural content. Original content makes people think differently. It can be surfacing stories that have never been told, or presenting a topic in a new way. Gen Z wants to explore and engage with a wide variety of different voices and viewpoints. They are the most diverse generation yet—from gender to sexual identity to ethnicity—and they want to see this diversity reflected in the content they consume.

**“I think the younger generation is always looking for something out of the box, they don't want anything formulaic. It's always about what's different and special.”**

– JASMIN MOZAFFARI, FOUNDER, PROWLER FILM

One's life experiences and expression makes what they create unique, but there is currently a gap in the diversity of representation in cultural content today. Diversity is a requirement for Gen Z audiences—in terms of both who is creating, and who is being depicted.

**“I think there are all kinds of different experiences and stories that we haven't seen yet that we will start to see through Gen Z, I hope.”**

– FANTAVIOUS FRITZ, SCREENWRITER,  
DIRECTOR, CINEMATOGRAPHER

From the moment they were born, Gen Z has had access to an extensive amount of information from around the world at their fingertips. They are open to, and expect, their cultural content to come from anywhere and everywhere. With such a high value placed on diversity and different perspectives, Gen Z is looking for global content and stories compared to Millennials who are more likely to seek out local content from Canadian creators and media outlets.

**75%**

Say original content  
is important to me

**1 in 2**

Think the industry  
hasn't caught up with  
the audience yet in  
terms of diverse  
representation

**-9** PERCENTAGE  
POINTS

vs.  
**Millennials**

Say it's important for me  
to consume content  
made by Canadian  
creators and media  
outlets

# Entertainment Draws Them In

The primary motivations for consuming cultural content are entertainment and information. This is true for both Gen Z and Millennials. The ranking of these motivations, however, is telling. Gen Z tends to place a higher value on entertainment. They consume cultural content for fun or to relieve boredom.

As such, they are particularly interested in topics like internet culture/memes, humour, and gaming. The informational cultural content Gen Z consumes is often produced in an entertaining way. The tone and presentation are what draw them in and keep them engaged.

**“I think that young people do want to see films that touch upon social issues. But in a way that's very creative and not hitting them over the head with a message.”**

– JASMIN MOZAFFARI,  
FOUNDER, PROWLER FILM

Millennials, on the other hand, place knowledge above entertainment when they seek out cultural content—they are looking to be informed and inspired. The topics they are interested in tend to be more practical, such as food, technology and health.

It is notable that both generations are highly engaged with music content. It is a universal passion point that can fulfill both recreational and intellectual needs.

## Gen Z Motivations For Consuming Cultural Content...



### #1 Looking For Entertainment

+11 VS. MILLENNIALS



### #2 Looking To Gain Knowledge

-16 VS. MILLENNIALS

## FAVOURITE TOPICS

### Gen Z

1. Music
2. Humour
3. Memes/Internet culture
4. Gaming
5. Food / Dining / Drinks

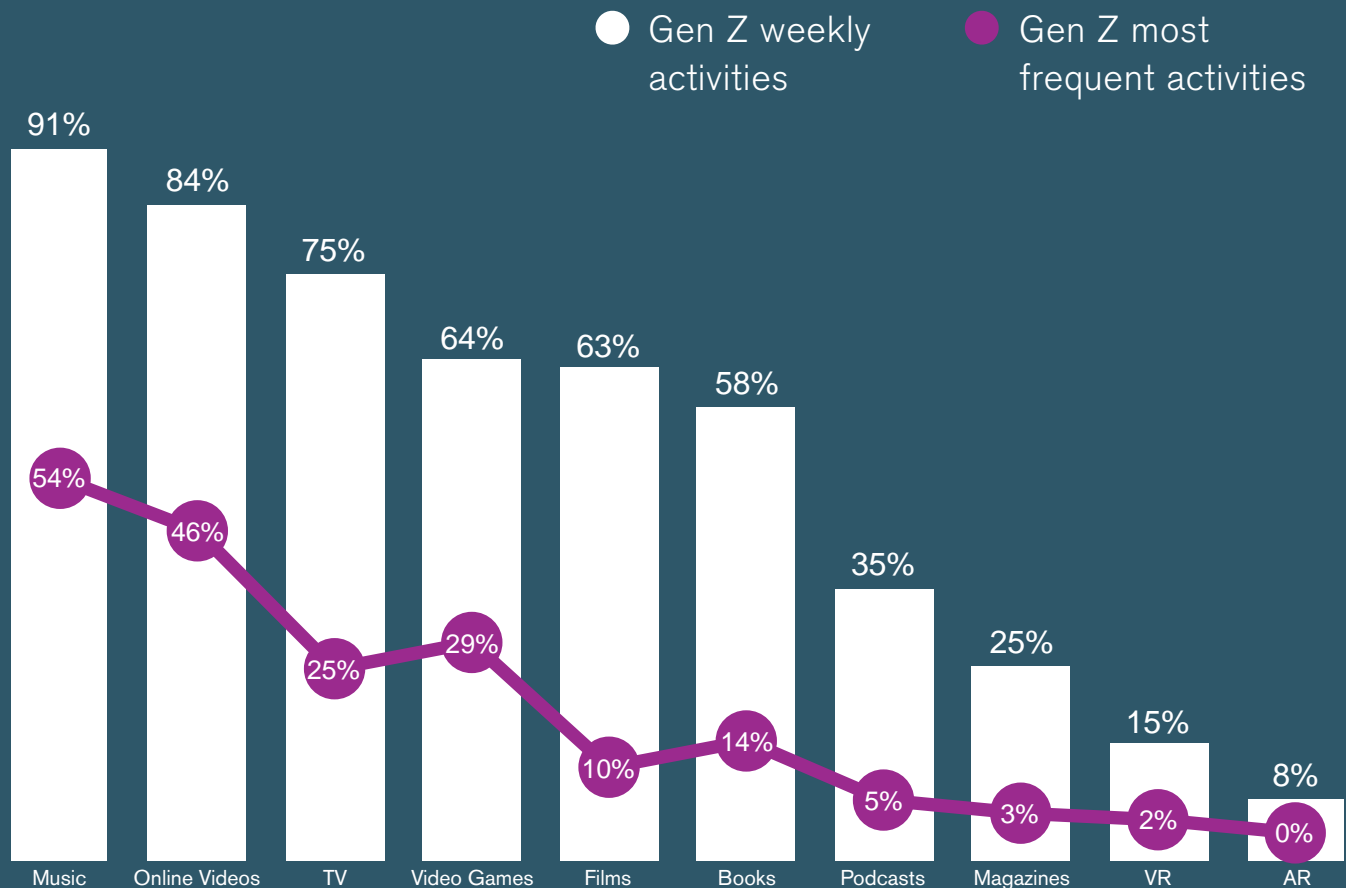
### Millennial

1. Food / Dining / Drinks
2. Music
3. Technology
4. Health/Wellness
5. Humor



# Formats Fit For Entertainment

Matching their desire for entertaining content, Gen Z tends to consume a lot of music, online videos and games. They still watch TV and movies, but not as frequently as millennials.



## Gen Z Are **Less** Likely to:

- Watch TV weekly (75% Gen Z vs. 89% Millennials)
- Watch movies weekly (63% Gen Z vs. 75% Millennials)

## Gen Z Are **More** Likely to:

- Listen to music frequently (54% Gen Z vs. 43% Millennials)
- Play video games frequently (29% Gen Z vs. 15% Millennials)



## ● Points on Gaming

**6 in 10** Gen Z say video games allow them to fantasize about things that are outside their grasp. This act of escapism fits with their inclination toward entertaining content.

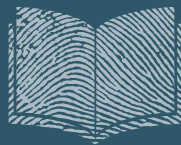


## ● Notes on Music

Gen Z has a short attention span when listening to new music. They'll keep listening if it's catchy; otherwise, they'll skip it immediately. When they do discover a new song they like, **7 in 10** will always search for more information about it.



## ● A Word on Books



Despite being digital natives, there is a significant preference for consuming the written word in print. **7 in 10** Gen Z say they prefer physical books over digital ones. For shorter reads, they are more open to the digital version with 1 in 2 preferring a physical magazine over a digital copy.

Young people are always looking for ways to use technology to enhance their content consumption experience. Most use a second device when watching shows and movies. Staying true to their motivations for consuming cultural content, Gen Z and Millennials want to achieve different goals with their second device. Gen Z are socializing and doubling down on entertainment. Millennials are seeking complementary information on the content they are watching.

# 6 in 10

Gen Z regularly use a second digital device while watching/streaming shows/movies

## Primary 2nd Device Activities:

### Gen Z

- Using social media
- Chatting with friends/family
- Playing games

### Millennials

- Looking up more information on the content they are watching
- Shopping online

# Discovery Journey Led By Creators And Publishers

Personal recommendations from family and friends remain the most trusted source of discovery for cultural content. But media publishers have become an important channel for discovery among Gen Z. Because of Gen Z's passion for music, they are discovering cultural content through music streaming services as well.

- Top Channels Where **Gen Z** Discover New Cultural Content:
  - #1** Friends/Family Social Media
  - #2** Music Streaming Services (Spotify, Pandora...)
  - #3** Media Publishers' Websites (VICE, BuzzFeed, VOX...)

● **78%** of Gen Z use social media to discover cultural content

Gen Z are heavy users of social media for cultural content discovery. YouTube is their go-to source. YouTube is the go-to source for Millennials as well, but this is where the similarities between generations in the discovery journey ends. For Gen Z, Instagram is a close second when it comes to content discovery essentials. They also turn to Facebook and Snapchat, but use these with different frequency than other generations. Gen Z uses Snapchat more and Facebook less. Visual cues and references (videos and photos) are fundamental to catching their attention.

Gen Z are also more likely to adopt new platforms like TikTok for content discovery. Successfully engaging with this generation requires constant innovation and experimentation on platforms, both old and new.

Platforms Used for Discovery		
	Gen Z	Millennials
YouTube	88%	88%
Instagram	80%	77%
Facebook	61%	80%
Snapchat	56%	20%
Twitter	47%	38%
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TikTok	21%	7%

“I think that social media will still be a means of how people [discover content] for a long time. TikTok is popping now...A lot of these records have blown up on TikTok. So that's how people are actually discovering it.”

- JAY DEVONISH, DIRECTOR OF A&R MARKETING, MUSIC AT ENTERTAINMENT ONE

# Quality Content Is Worth Paying For

90

Pay for cultural content  
regularly

4

Average cultural content  
services paid for

Nearly all young people pay for cultural content. With the average person paying for four different content services, it is clear that cultural content is highly valued. Music and video streaming are the top paid services for both Gen Z and Millennials. Aligning with their love of entertainment, Gen Z is also notably paying for games in all forms - console, PC and mobile.

While Gen Z are voraciously consuming TV and movies, the proliferation of cord cutting can be seen in the stark contrast between what Gen Z and Millennials pay for when it comes to this type of content. Cable and satellite TV is among the top services Millennials pay for but doesn't even make the top five list for Gen Z.

## Top 5 Paid Services

### Gen Z

Music Streaming  
Movie/TV/Video Streaming  
**Console Games**  
**PC Games**  
**Mobile Games**

### Millennials

Movie/TV/Video Streaming  
**Cable/Satellite TV**  
Music Streaming  
Mobile Apps  
Books/Digital Books/Audio books

We are no longer in an era where an ad-free experience is an incentive to pay for content. Better quality, better experience, and convenience are what make content worth paying for today. Quality to Gen Z means a distinct offering with content they can't get elsewhere.

Experience and convenience go hand in hand. Gen Z finds value in frictionless, personalized experiences. They want to be able to easily find content curated for them, gravitating toward platforms that do much of the hard work of discovery for them.

While it is clear that Gen Z will pay for high quality content, their desire for unique content means they will go to great lengths to get access to that content. Gen Z are more likely to say it is okay to download illegal or bootleg content than Millennials (54% vs. 44% respectively). For this generation, it's becoming a social norm.

## Top Elements That Make Content Worth Paying For

61% Better Quality

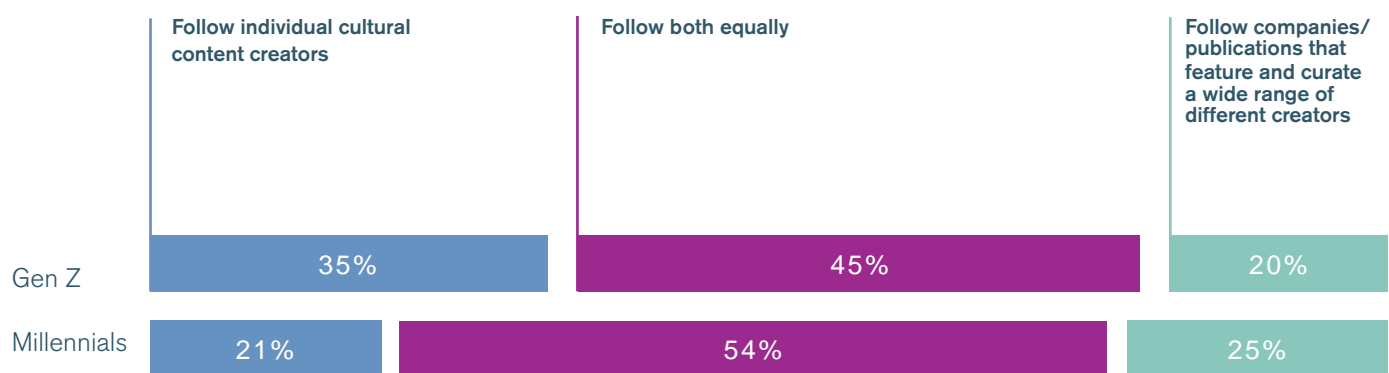
56% Better Experience

50% Convenience

41% No Ads

- Gen Z follows individual content creators more than Millennials do. Exposure to different viewpoints is important to Gen Z and they are always searching for something unique. The personalities of these individual creators can feel more authentic and be easier for young people to trust and relate to.

This trust and relevance is strengthened by the content outlets these creators use. Social media platforms like Snapchat and TikTok often act as micro-blogs on which creators can put themselves out there in a way that is true to them. They have a rawness to them, removing the barriers between the creator and the audience and showcasing a very human side of the creator. Connecting with Gen Z on this more emotional level translates to greater influence. It's not simply a numbers (of followers) game anymore.



What attracts young people to cultural content is also what makes them want to share it. Gen Z shares content if it's funny and entertaining. They also share it if it is relatable and helps them express their opinion.

They most often share content on an individual level - sharing in person or shooting a text message to their friends and family.



## Typical Methods Used To Share Content

- 66%** In Person
- 61%** Text Messages
- 58%** Social Media

# Funding Creativity



Cultural content clearly plays a critical role in young people's lives. It's imperative to support the creators making this content so they can continue creating, innovating, sharing and pushing culture forward.

Most creators today are monetizing their content through ad sales and brand partnerships. Creators indicate that they often struggle to make enough money through ads. In many cases, in order to do so, creators would have to flood their content with so many ads it would impede their audience's experience.

**“When I researched how many ads we would have to run to make it worthwhile, I was like, you would not want to watch the number of ads we would have to place in here.”**

– MIRIAM VERBURG, CEO,  
BLOOM DIGITAL MEDIA

Creators are quite open to brand partnerships and view them positively. Many times creators will seek out brands they want to work with; brands that match their values. The brand partnerships that are most beneficial to the creator and the brand are those that are true relationships in which each party is invested in the development of the other. These relationships are collaborative and long term. Both parties understand the audience and the type of content and messaging that will resonate with them, ensuring the output is not only engaging but authentic.

**“It's really nice when we're working with brands on content, it's truly been a collaboration. Whereas I feel like in times past, it's more like a commercial in a sense that they would send along their script, their breakdown, and you're just regurgitating that in the comfort of your own bedroom, or your filming studio.”**

– JACLYN FORBES, YOUTUBER, MAKEUP ARTIST, HOST

Another way of supporting their work is for creators to go straight to their fans for funding. Many are building their own networks and thinking about monetizing from all angles - from shows and touring to subscription and crowdfunding sites.

**“Brand collaboration wasn't a viable route to monetization for us because it didn't align with our feminist ethos, which is why we turned to Patreon. Patreon was initially successful, but I think it's just the sort of thing that people don't keep on top of their minds.”**

– JEANINE BRITO, FOUNDER, SOPHOMORE MAGAZINE







# Creating For The Future

- As pop culture and media play an increasingly important role for Gen Z, media publishers and content creators have the responsibility to inform young people's worldview and an opportunity to shape their identity and values.

## LOOKING FORWARD, CULTURAL CONTENT FOR THE NEXT GENERATION SHOULD:

- Represent the entire spectrum of diverse individuals
- Entertain as well as inform
- Draw original content from across the globe
- Empower and support unique voices
- Put quality over quantity (and ad-free platforms)
- Enable discovery and engagement across platforms