



Global

# Youth Spotlight

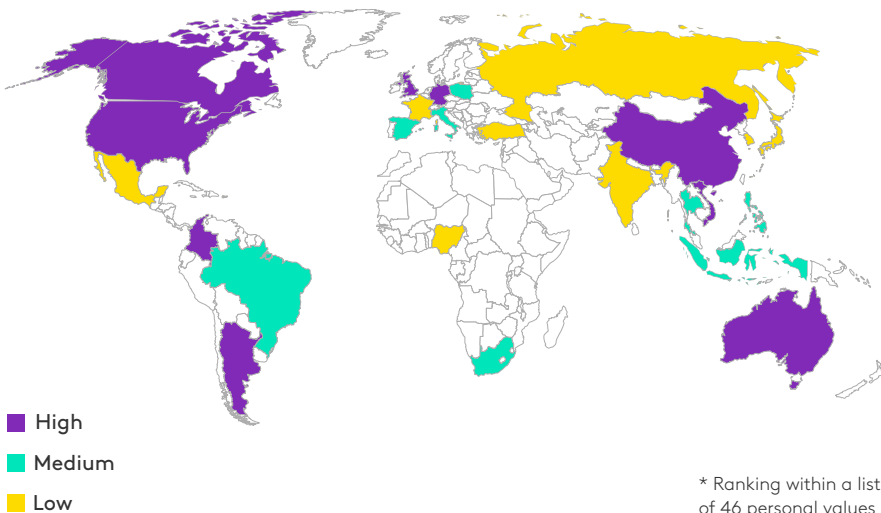
Gen Z and Social Life



This past year of social distancing necessitated by the pandemic has thrown into relief that social life is a necessity rather than a luxury. This is especially true for Gen Z, a generation coming of age, finding their place in the world, and searching for that ever-elusive feeling of belonging. Social life is especially important for Gen Z; it has also been especially affected. The world in which Gen Z is growing up, finding their footing, and making connections is in many ways similar to generations before them – with school, first jobs, sports, hobbies and friends – but in many ways it is vastly different. The internet has brought the world, people and ideas to their doorstep and made these things more accessible to them than ever before – fundamentally changing the possibilities for how they form their social lives.

## Importance of Belonging for Gen Z

Gen Zers who believe **“Belonging: Feeling you are a part of a place or group”** is an extremely or very important personal value  
(Ranked by Top-2 box)



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*I heard that it used to be quite common for kids to go outside by themselves and play with the neighbors. That happens less frequently these days –if at all. We are less likely to be friends with our neighbors than our parents’ generation was. We now socialize more via mobile apps through the internet.”*

- Streetscaper, Germany



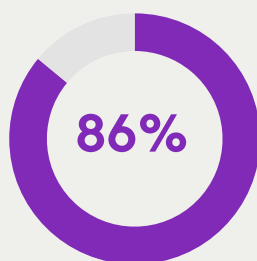
Gen Z life is very much rooted in active socializing – more so than for the general population. For them, social life is a key part of their wellbeing and growth as individuals.



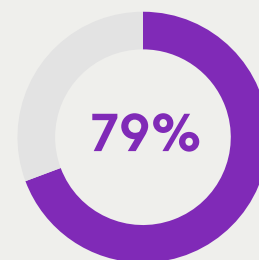
*There is a biological basis for young peoples' need for socialization. Bonding isn't a luxury; it's critical for development. Young brains need social connection to feel secure about their identity and place in the world."*

- Gregory Lewis, Neurobiologist, Indiana University

Percentage who are very/somewhat likely to: **"Splurge on out-of-home leisure activities with family or friends"** (e.g., eating out at a restaurant, visiting the cinema, sports events or theme parks) in the next 12 months



Gen Z



Global Total (All Ages)

Percentage who believe **"Taking the time to nurture one-on-one relationships"** is extremely or very important in their personal life



Gen Z Male



Gen Z Female





## Friends are anywhere and everywhere – offline and online

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*Besides, due to these social media applications, it is easy to have new friends, friends that I have never met before. However, I know their faces and voices. I chat with them, share ideas, videos and photos with them too."*

- Streetscaper, Germany

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*When you spend so much time socializing online it is easy to start contact with new people. Those connections can become friendships."*

- Streetscaper, Portugal

Fundamentally, digital connection has increased the breadth of people with whom Gen Zers socialize. The range and types of people with whom they connect is wider than in previous generations.

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*Digital-only friends are now a norm in Nigeria, now bridging physical distance and providing a sort of intimacy that was previously reserved for people who had physically met. People want ways to connect with people in their 'niche' communities and who share the same interests with them."*

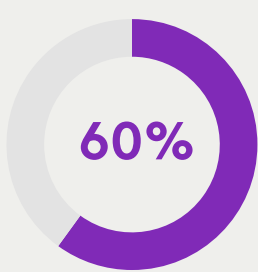
- Streetscaper, Nigeria

In previous generations, people often believed that friends made in real life – friends that one had met with physically – were somehow more “real” and intimate. Gen Zers don’t tend to make such clear divisions.

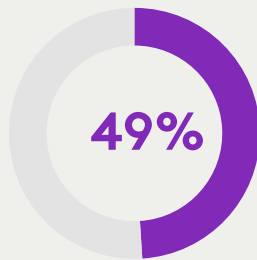
Physical proximity used to matter more, but now many Gen Zers feel that friends – whether known through physical proximity or solely through digital means – are just that – friends – as long as they share common interests and connections.



Percentage who believe:  
“Finding a community that shares your interests and beliefs” is extremely or very important



Gen Z



Global Total (All Ages)

### In-person socializing doesn't look much different from other generations'

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*I socialize with people that have similar interests to me. My interests change pretty quickly depending on what I'm learning, so the people that I like have a wide variety of interests. I generally socialize at school, extracurricular activities, and parties. Normally, we'd hangout at someone's house and watch a movie. Under non-COVID circumstances, we'd be going to car shows, the rock-climbing gym, local parks, state parks, etc."*

- Streetscaper, U.S.

### Digital-only friends are "just as good" as real-life friends

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*Digital only friends are totally fine, and the bond can be just as good, though there might be some awkwardness in maintaining long and thoughtful conversations since you've never met and experienced things together in real life."*

- Streetscaper, Vietnam

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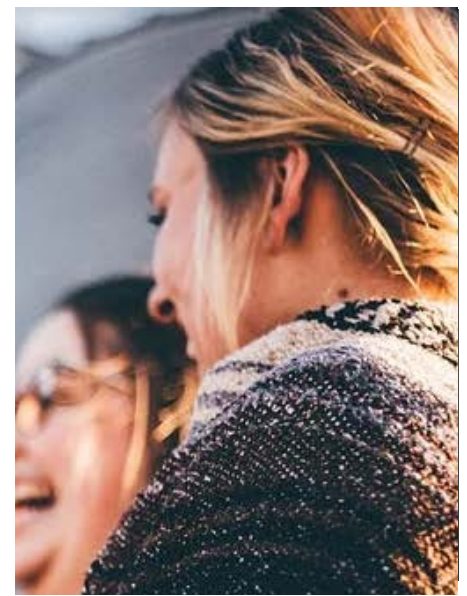
*All things considered, internet makes it really easy for you to find likeminded people, and you should not waste those opportunities to find connections even if it might be a bumpy ride."*

- Streetscaper, Portugal

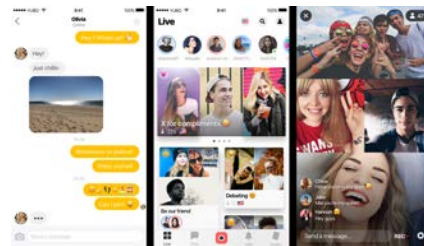
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*Yes, my generation is full of digital social media which enables us to interact differently which is inclusive than before. As long you can access social media, you will simply interact in your own way. Even those who find it difficult socializing in person in this generation are able to socialize easily online"*

- Streetscaper, Tanzania



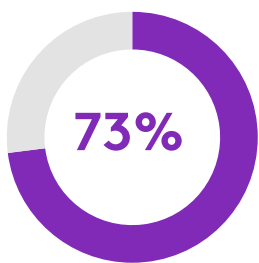
Because Gen Z can develop friends in real life or through digital means, many apps have sprung up expressly to help Gen Zers find and forge friendships with each other. Many such apps have accelerated their growth during the pandemic as Gen Zers look for new ways to connect with more people.



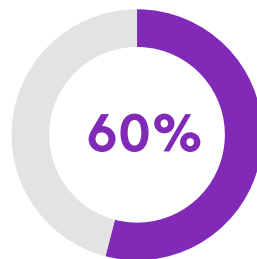
Fast growing French social app **Yubo** focuses on Gen Z and live-streaming rooms that are made up of 5-10 people. The twist is that you can't follow others or like their content. The creators of Yubo believe this will discourage "performance" and nurture more real connection and friendships.

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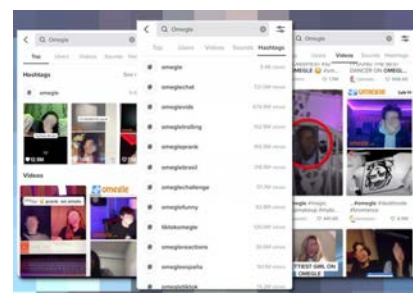
Percentage who strongly or slightly agree:  
**"The internet helps me connect with other like-minded individuals and make friends"**



Gen Z



Global Total (All Ages)



**Omegle** is another livestreaming app where users can go to make friends. Especially popular with teens, it has a reputation for racier content. Many of the livestreams are connected to TikTok influencers, but the platform is the subject of controversy in several markets due to lack of moderation and possible illegal activity. Usage has ballooned since the start of the pandemic.



# Spotlight on Gen Zers' in-game socializing

Virtual game spaces have taken off in the last year as a place for Gen Zers to meet up with friends and to socialize while remaining physically apart.



## Games add a new dimension to social life

Even before the pandemic, Gen Zers were adept at socializing at a distance via gaming. However, as the pandemic developed and people became more physically isolated from lockdowns and other COVID-19 restrictions, many Gen Zers turned to multi-player networked games to manage stress, anxiety and their social lives.

Nintendo's **Animal Crossing** became a key outlet for many around the world to socialize via their in-game avatars. People developed social activities like matching the clothing of their avatars to their friends', creating crafts, building in-game stores, playing scavenger hunts or just partying in the playful virtual realm.

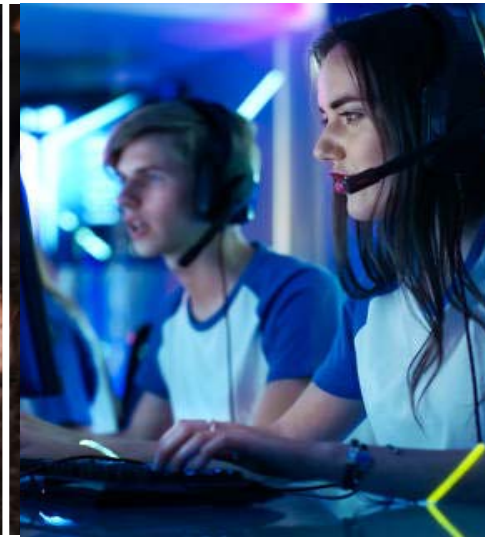


Less child-like, but still rooted in fantasy, others flocked to massive online world games such as Final Fantasy XIV or World of Warcraft where they either roamed with real-life friends in avatar form or found new avatar friends from the thousands online to hang out with, chat or go on adventures.

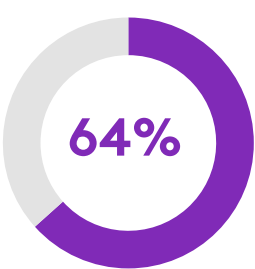


## China bans online gaming with foreigners to restrict socializing

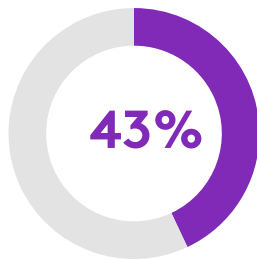
In the wake of the COVID-19 outbreak in China in 2020, the government took the extreme step of banning Chinese gamers from playing or chatting with foreigners in videogames. In doing so, the government acknowledged that people playing these games were meeting and socializing to an extent that was un-policable by the government. Many gamers had been logging onto games and complaining about the government in game chats and making satirical content inside games. Zombies, plagues, map editing, and organizing a union in video games are now also banned.



Percentage who report that they:  
**Play video or computer games  
 (once a week or more often)**



Gen Z



Global Total (All Ages)

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*Me and my friends spend more time - about 70% - chatting through application than meeting physically. Often, we socialize by playing online games such as Pubg which is an online multiplayer royale game. We don't meet physically and play physical games."*

- Streetscaper, Germany

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*I socialize online even more, mostly with my classmates, or people I find interesting on social networking platforms. This means more virtual bonding activities, such as playing video games together."*

- Streetscaper, Vietnam



### Socializing in Virtual Spaces Evolves

While Gen Zer's are pioneering how people socialize in virtual spaces, game makers are evolving game worlds to make it easier for people to gather, meet and interact moving ahead.

One way is by making portable social graphs. A perennial problem occurs as gamers cycle through games. Social graphs – built in the game are usually not transferable. Often, players need to re-build their networks from scratch with each new title. Game companies like Xbox Live, Playstation and Epic Games are looking to engineer away this process – they are working on the portability of gamers' networks so gamers can instantly switch to new games with old, existing friends.

An additional way that consumers will see socializing in gameworlds simplified is via spectatorship. That is, watching gameplay without playing. With the popularity of Twitch and now virtual events, game makers feel this will be a natural extension for people to move on from – from just watching to exploring more complex game spaces. Especially as game engines like Unreal and Unity are being leveraged to make virtual movie and TV settings – participants can look forward to being able to explore these spaces together with like-minded friends.

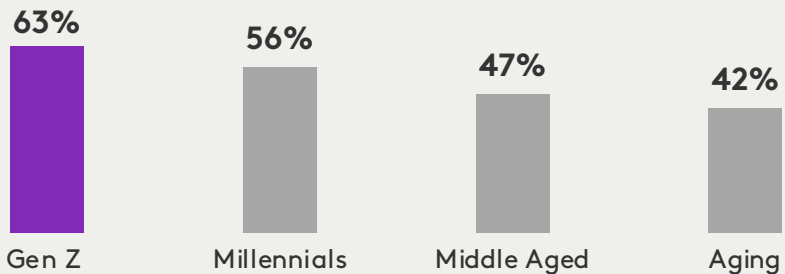




# Social Media Dominates Social Currency

As with other generations, Gen Zers lean on social currency and activities as ways of generating conversation and deepening bonds. But while previous generations relied on shared physical activities and meetings, today the balance has shifted toward constant, continuous digital “stream of consciousness” socializing.

**Percentage who think that “Seeking experiences that can be easily shared” is extremely/very important to their personal life**



## Social Media – Fuel for continuous conversation

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*I remember for the past 2 decades when I was still a kid, I could see my brothers visiting and hanging with their friends often. They would go out and play basketball and baseball with their friends, ride bicycles, sit in the back yard and talk to each other. During that time, despite the fact that landline and mobile phones had come into existence, interaction and socialization among youths and people was generally physical. You had to visit a friend in person if you had anything to share. However, things have changed. We now socialize more than ever – and all the time – via mobile apps through the internet.”*

- Streetscaper, Germany

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*To socialize for instance, we might watch videos on YouTube together or share what we see on our social media. When we share pieces of media: a photo, a video, or a text for example, we expect other people to interact with us. We want likes, comments, texts. Since we are constantly connected to social media through our smartphones we are constantly socializing.”*

- Streetscaper, Portugal

Key to the constant conversation is the social currency that is culled from digital media – be it social media content or bits sourced from private messages.

In fact, Gen Zer non-digital, offline social life is now sometimes spent making digital social media content.

*We usually go for food, drinks, movies, photoshoots, or some kind of trending activities. How we might differ from previous generations is we might have fun by creating something together for social media, such as a TikTok.*

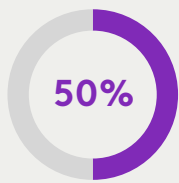
- Streetscaper, Vietnam



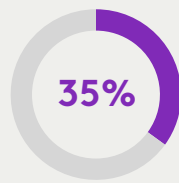
### Social Media is a Necessity

Percentage who agree that: "Social media is something I don't think I could live without."

(Top 3 Box on a 7-point scale)



Gen Z



Global Total  
(All Ages)

### Real life venues for hanging out are affected by "Instagramability"



*Expectations for socializing seem largely the same, but the form it takes is possibly what is different in today's world. An Instagram-able location is always preferred - everyone wants to be able to take and post a good photo of themselves socializing on their preferred social media. This new requirement has led to an increase in restaurants that are hyper-focused on aesthetically pleasing spaces and curating experiences."*

-Streetscaper, Nigeria

### #1 mobile activity for Gen Z by market

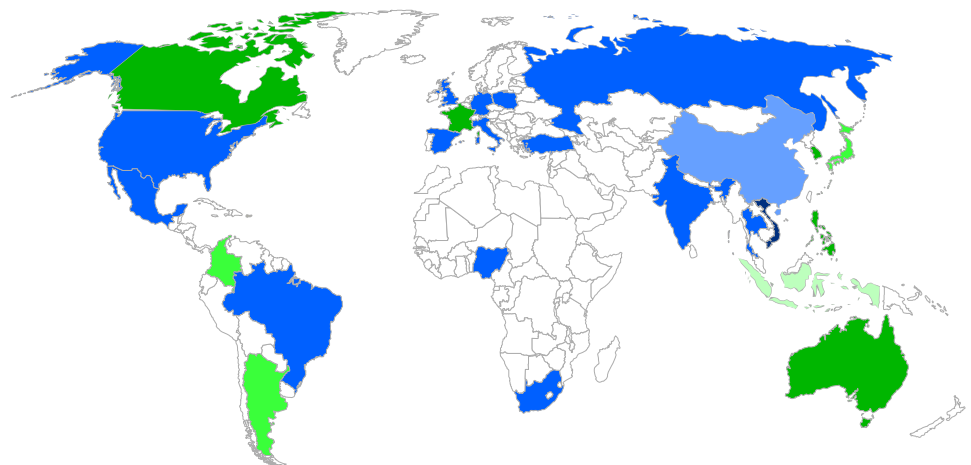
(Activities engaged in on mobile in the past 30 days)

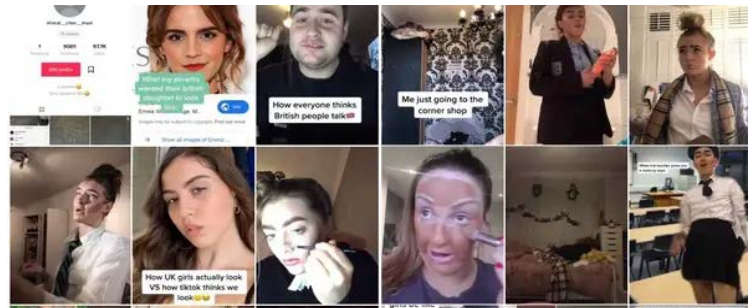
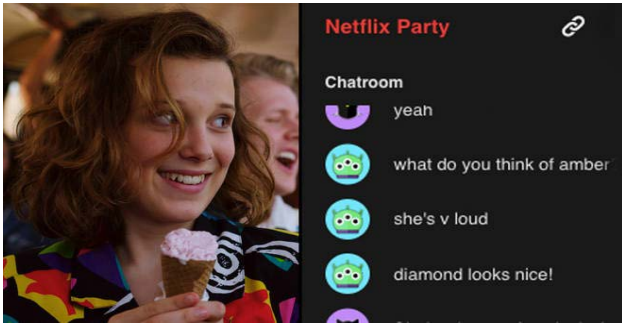
#### Social Activities

- Text, SMS, MMS or Instant Message,
- Take/ share Photos or Videos
- Visit a Social Network

#### Other

- Listen to music
- Buy online
- Play games





## Netflix Teleparty – Easy Sharing

*“Netflix’s Teleparty is a browser extension which allows you to watch Netflix with your friends online. You create a party. It will give you a link to share with your friends. Then it will sync the film with every computer who has used the party link. If one member decides to stop the video, everyone’s video will be paused. Moreover, it has a chat on the side of the film so people can share their opinions while the film is playing. It felt quite similar to watching a film in a friend’s house.”*

- Streetscaper, Portugal

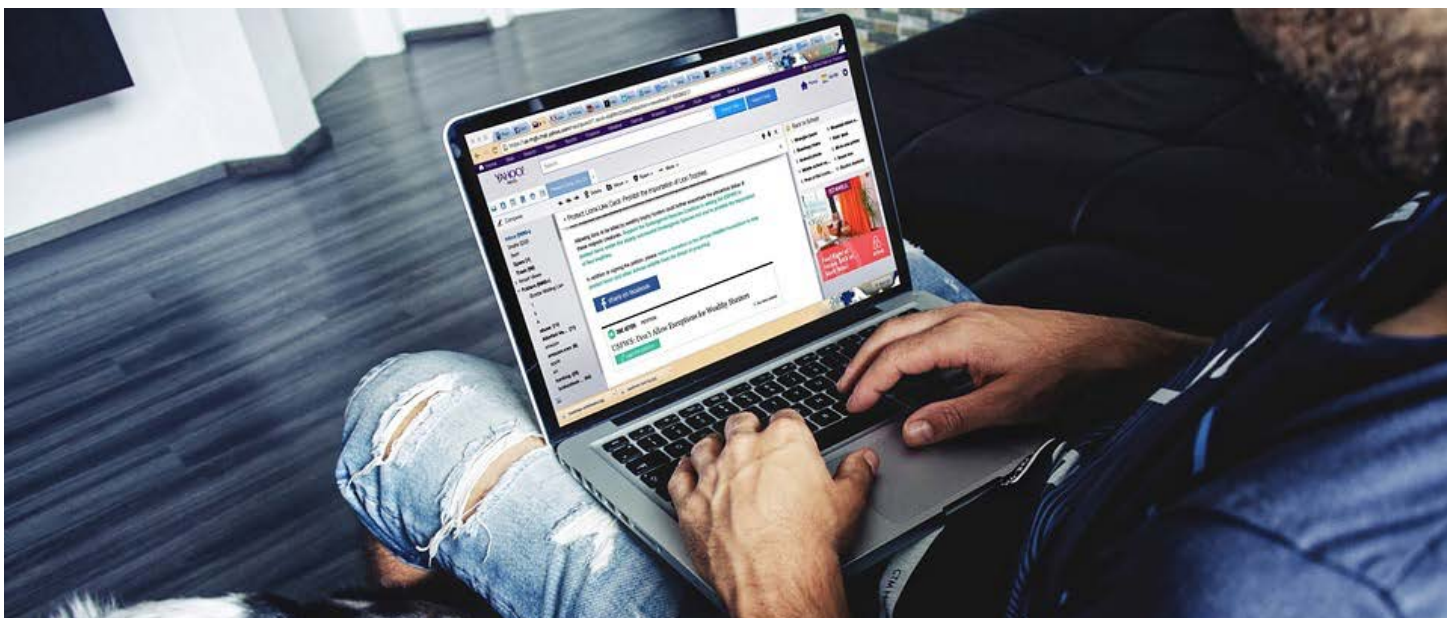
## TikTok – Authentically Non-intimidating

*“I think TikTok has more authentic content and is therefore less intimidating and polished than Instagram or other social networks.”*

- Streetscaper, Vietnam

*“TikTok is known to make people go viral very easily, meaning connecting with other across the platform is very attainable unlike other apps where you would need a large following to truly connect with others.”*

- Streetscaper, U.S.





# COVID-19 Restrictions Change the Balance

COVID-19 has – unsurprisingly – deepened Gen Zers’ reliance on digital socialization. With many now transferring the majority of their social time online.

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*COVID has forced me to socialize online even more, mostly with my classmates, or people I find interesting on social networking platforms. This means more virtual bonding activities, such as playing video games together.”*

- Streetscaper, Vietnam

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*Due to COVID-19 we are forced to spend a lot more time socializing on the digital world instead of offline. I believe the pandemic has, in a certain way, made us give more value to the time we have spent socializing offline.”*

- Streetscaper, Portugal

COVID-19 restrictions shifted the balance of socializing for Gen Zers onto digital platforms. While many felt perfectly comfortable socializing there, it may have created a newfound appreciation for the time spent socializing offline.

## Taking real-life friendships online



### Houseparty

*“This app became super popular in my country. In a span of a week, half of my contacts had installed the app. This app was different from other video chat apps since it notified you when your friends were available for video chats, and it allowed you to join the video chats your friends were in. This feature was quite attractive since it allowed you to meet your friends’ friends. Moreover, most of my friends had a funny story created by an uncaredful use of this feature.”*

- Streetscaper, Portugal



# Implications

1

## Digital only friends are not “less than”

Gen Z consumers are thoroughly versed in digital connection and friendships. Unlike consumers of the past, they do not view “digital-only” friendships as weird, unusual or “less valuable than” those forged in real life. Brands can participate by helping Gen Zers foster digital-only relationships and make them deeper – perhaps through “challenges,” sponsored group activities or other catalysts for Gen Zers to bond. Conversely, brands can help Gen Zers bring “real-life” relationships online through similar tactics.

2

## Expanding social circles

Gen Zers are seeking connection everywhere and anywhere – as long as they have shared interests with new contacts. Make it easy and non-intimidating for them to connect with new people via their interests with brand sponsored forums, educational platforms or livestreams that introduce them to new people they can potentially connect and bond with.

3

## Spontaneity is fun

As the world becomes more routine, planned and reviewed, Gen Zers are looking for an escape through spontaneity. In terms of their social life, give them an avenue to safely meet surprising, fresh and unknown people through whom they can make connections. Gen Zers value simple, unvarnished and unintimidating avenues for socializing. Brands can provide this by bringing people together with sponsored get-togethers, parties and events – both online and off – where Gen Z can meet and greet people who are completely unexpected.