

THE GEN Z CENSUS

U.S. Edition

VOL. 02

20
19



EVERYTHING YOU NEED TO KNOW ABOUT GEN Z RIGHT NOW

In marketing, brands live and die by data. And in a world where there's a metric for just about everything, one group refuses to fit into a single checkbox. Gen Z—the cohort of Americans aged 10-24 born between 1995 and 2009—have tended to elude marketers. After all, how do we quantify or qualify a group of youth whose own self-definitions are constantly evolving? For the first time ever, we're doing just that. Introducing the Gen Z Census—our deep-dive into everything Gen Z.

With the upcoming 2020 census, Americans can expect to receive a very narrow view about individuality. The census will only be covering same-sex relationships meaning any single LGBTQ+ individuals won't "count."

In the past couple of years, the internet has proven that diversity is more than just a hashtag, it's a lived experience but sometimes it doesn't feel like it. With the upcoming 2020 census, Americans can expect to receive a very narrow view about individuality. The

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census will only be covering same-sex relationships meaning any single LGBTQ+ individuals won't "count." There will also be no option to distinguish transgender, non-binary, or gender non-conforming individuals. If we have learned anything in the past decade, it's that representation matters.

North American media has always represented a very specific group of people but through critique and a change of demographics, this is all beginning to change. Though, it may not be changing quickly enough.

Herein lies the challenge for those who live outside the typical norm represented to us in everyday life, whether it's through government forms or our favorite TV shows. The world is changing, and each new generation brings its own set of expectations of how they want their stories told. The kinds of stories being told are beginning to expand and shift. Are brands keeping up? Gen Z doesn't think so.

When it comes to representation in marketing, **47%** of Gen Z reported that they do not feel well-represented. Gen Z yearns for deep and well executed coverage of important topics like sexual orientation, racial/ethnic identity, and gender expression. Their identity is dynamic, forever changing and unable to remain static. Their rejection of labels and natural desire to celebrate diversity amongst each other allows them to coexist whilst expressing their own personal individuality. "You do you," is their mantra after all and it's not sardonic. Together, Gen Z makes up a colorful mosaic that can't and shouldn't be summed up through simple generalizations, not when they don't all fit into the same box. So, for our Gen Z Census, we gave them as many boxes as they needed to truly tell us who they are.

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and branding

INTRODUCING OUR FIRST COMPREHENSIVE CENSUS OF GEN Z

Wattpad tapped into our voluntary youth panel, Generation Wattpad, representing our most engaged community members, to create a census on Gen Z.

We conducted two separate surveys in the U.S. among hundreds of our panel members and through these surveys we were able to get a grasp on who Gen Z is and what Gen Z looks like as a whole and individually. The results tell us that Gen Z is a unique group focused on social purpose and seeking out all the diversity the real world has to offer. Their online world is important enough to them that they expect it to reflect the real world they live in as opposed to a “perfect” and unrealistic curation.



REPORT METHODOLOGY

Unless otherwise indicated, all data represented in this report is the result of ongoing research with the U.S. members of Wattpad's North American youth panel, Generation Wattpad, made up of youth ages 13-24. The data in this report reflects insights from two surveys conducted each with **576-802** responses between April and June 2019. The results are reported at a **95%** confidence level.



WHO IS GEN Z? THE SOCIALLY CONSCIOUS GENERATION.

Summing up Gen Z is a hard task. They are a generation made up of unique individuals who genuinely enjoy and celebrate their differences.

Unlike the famous metaphor that describes the U.S. as a melting pot, Gen Z has been described as more of a mosaic. There is no blending the generation into one. Consider this: **41%** of Gen Z identify as a visible minority with only **9%** being born outside of the U.S. When we delve into sexuality, **21%** of Gen Z say their sexual orientation has changed within the last two years. The change may have come via being exposed to various representations of the LGBTQ+ community or simply through self-reflection.

While you cannot paint Gen Z with the single stroke of a brush, there are some traits that this generation seems to have in common. Their unique personas and individuality sets them apart from one another but that particular idea of personhood is also what bands them together as a generation.

9%
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WHO IS GEN Z?
THE SOCIALLY CONSCIOUS
GENERATION.

Get to really know Gen Z. Based on what we learned about their personality traits, passions, sexual and gender identities, and career aspirations, we created fictional characters that represent the makeup of Gen Z found in the research. In wanting to reach Gen Z, you can ask yourself if your messaging will resonate with the different personas below.



Prefers to keep a small but close circle of friends

- Straight (someone who is attracted to the opposite sex)
- An engineering student
- Loves watching superhero movies
- Is a creature of habit—new things? No thanks.
- Hides from the camera at social events

Gender

- **86%** Female*
- **6%** Male
- **4%** Non-binary
- **1.5%** Gender fluid
- **1.5%** Transgender
- **1%** Other

* Note that our platform and youth panel in particular skews female

Race

- **1%** Middle Eastern
- **3%** South Asian
- **18%** Latinx/Hispanic
- **5%** Native American/Indigenous
- **16%** Black
- **50%** White/Caucasian
- **6%** East Asian

WHO IS GEN Z?
THE SOCIALLY CONSCIOUS
GENERATION.

Sheer THE EMPATHIZER



Sympathizes with others' feelings and is interested in other people's problems

- Pansexual (not limited in sexual preference with regard to biological sex, gender, or gender identity)
- Bank teller and part-time writer
- Loves writing fantasy novels
- Resident group-chat therapist
- Wants social equality for everyone

Sexuality

19% Bisexual

• 1% Gay

6% Asexual

4% Lesbian

52% Straight/Heterosexual

9% Questioning

8% Pansexual

• 1% Other/Prefer not to say

WHO IS GEN Z?
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GENERATION.



THE VISIONARY

Has a vivid imagination and no shortage of ideas

- Bisexual (sexually attracted to individuals who identify with a partner's sex or gender identity of either male or female), goes by the gender-neutral pronoun "they"
- Media student who wants to work in animation
- Loves watching eGirl/eBoy videos on TikTok
- Loves expressing themselves through personal essays

THE PHILOSOPHER



Loves to think outside the box

- Straight
- Already has three new ideas for his next side-hustle
- Captain of the university debate team
- Sees political action as a route to social justice
- Loves gaming

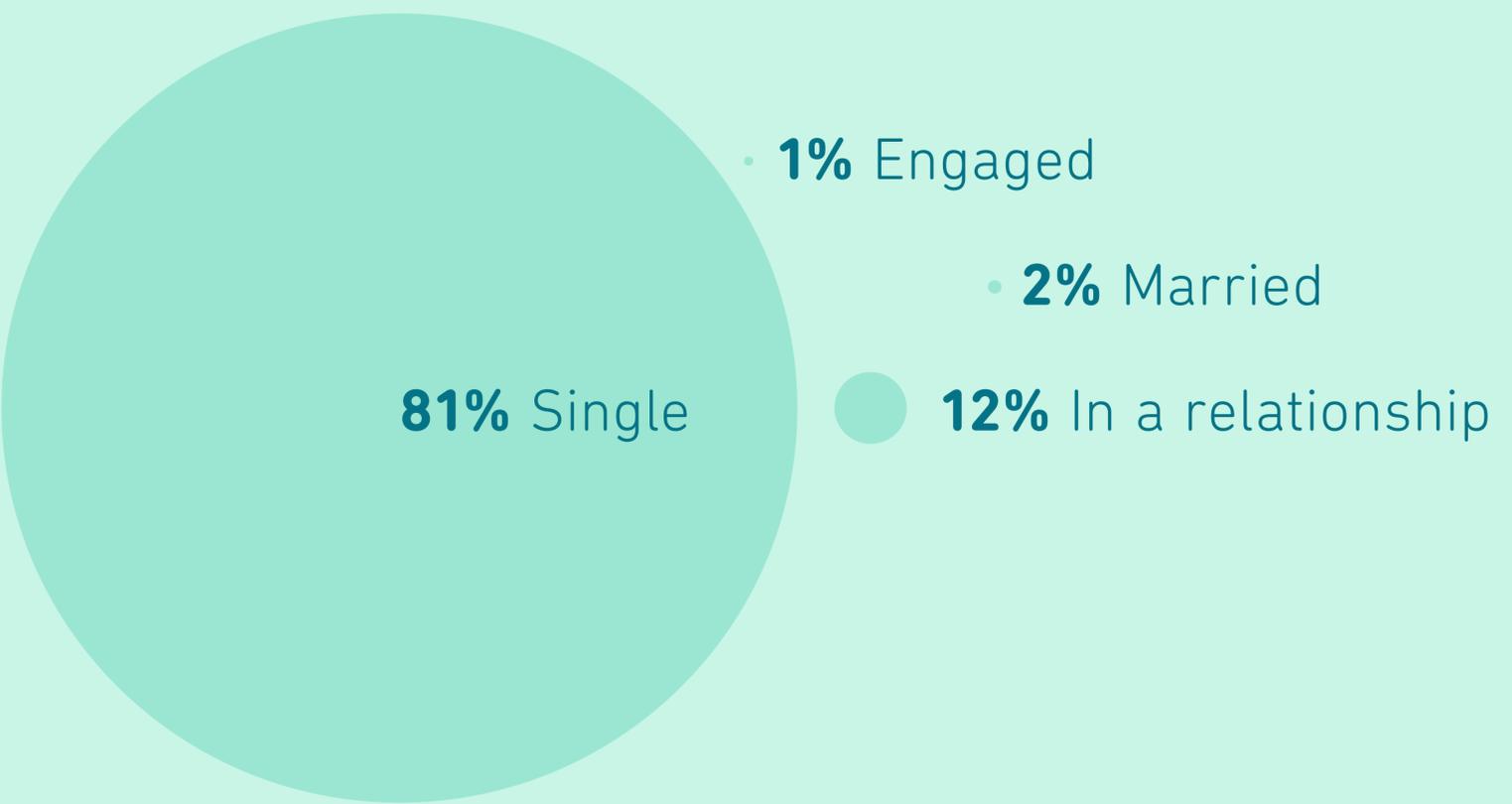
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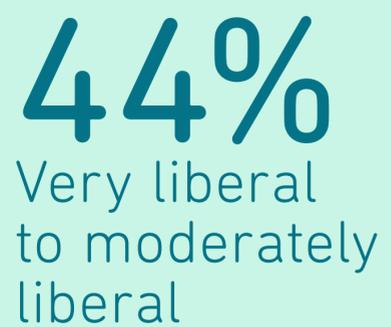
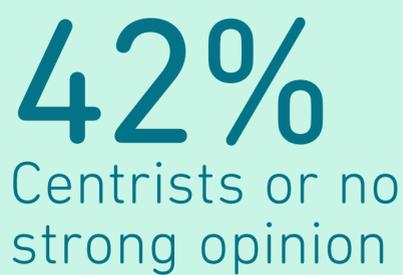
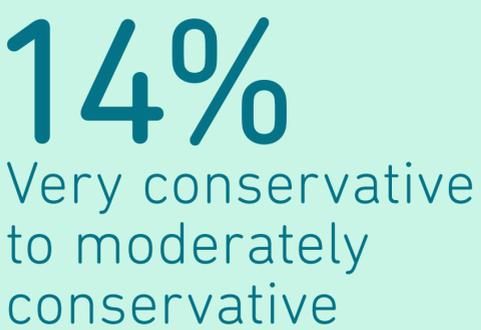
Gets upset and excited easily

- Straight
 - Reads Tarot cards as her side-gig
 - Posts personalized astrology videos on YouTube
 - Is an advocate for mental health
-

Relationship Status



Political Stance



WHO IS GEN Z?
THE SOCIALLY CONSCIOUS
GENERATION.



THE JACO FREE-WHEELER

Is personable and the life of the party

- Lesbian (an individual who identifies as a women and is solely sexually attracted to women)
 - Studying music
 - Has aspirations to be an influencer
 - Loves volunteering with a local kids' soccer league
 - Is anything but camera-shy
-

Family Makeup

- **4%** Unmarried/common-law parents
 - **1%** Same-sex parents

94% Have siblings including step/half/adopted

- **18%** Divorced parents

- **1%** Unemployed and not lookig for work

School/Work

- **3%** Part-time/internship
- **3%** Unemployed and looking for work

- **9%** Working full time

80% In school

WHAT DOES GEN Z CARE ABOUT? EQUALITY.

Gen Z told us they know individuals who identify across a spectrum of identities. For example, **47%** of Gen Z know someone who identifies as transgender (a person whose sense of personal identity and gender does not correspond with their biological sex). **35%** of Gen Z know someone who identifies as non-binary (a spectrum of gender identities that are not exclusively male or exclusively female). **32%** know someone who identifies as gender fluid (a person who does not identify themselves as having a fixed gender). **23%** know someone who is gender non-conforming (gender expression by an individual that does not match

“The Founding Fathers of the United States left behind the idea of unalienable rights (life, liberty, and pursuit of happiness). These rights should be given to all; no matter a person’s race, religious belief, or gender.”

masculine or feminine gender expression and performance) and **5%** know someone who is intersex (individuals born with any of several variations in sexual biology). To take that further, **43%** of Gen Z know someone who uses gender-neutral pronouns such as “they”, “them”, or “ze.” Even **5%** choose to use gender-neutral pronouns themselves. It’s unsurprising that they don’t feel well-represented in the media, after all respectfully showcasing trans people and gender non-conforming individuals has become a rather recent concept.

WHAT DOES GEN Z CARE ABOUT? EQUALITY.

In their fight for equal rights for all, Gen Z considers themselves most passionate about trans rights.

66% agree or strongly agree that public spaces should provide access to gender-neutral washrooms. On a scale of 1 to 5 (with 5 being strongly agree), Gen Z's support for the US to increase the rights for trans people ranked a **4.3**. Their belief that everyone should have access to equal rights regardless of race, sexuality, religion, gender and citizenship ranked an average of **4.9**.

"The last line of the pledge of allegiance is 'Liberty and justice for all.'"

Gen Z's support of minority groups is loud and clear. When asked about their personal support of equal rights, one member of Generation Wattpad stated, "the last line of the pledge of allegiance is 'Liberty and justice for all.' The United States lives on the land that was owned by minorities so everyone should be given equal rights." Overall, equality and equity are obvious human rights to Gen Z. They don't ask why minorities should have equal rights, but instead they ask why not? "The Founding Fathers of the United States left behind the idea of unalienable rights (life, liberty, and pursuit of happiness). These rights should be given to all; no matter a person's race, religious belief, or gender," said another member of Generation Wattpad. It's a no-brainer. To Gen Z, all humans deserve equal rights and all humans deserve to see themselves represented in the brands they support.

"We're all human, why can't it be that simple?"



WHAT DOES GEN Z CARE ABOUT? EQUALITY.

Spectrum of Identities



Gen Z and Equality

On a scale of 1 to 5, how much do you...

...believe that public spaces should provide access to gender neutral bathrooms?



...agree that your country should increase rights for people who identify as transgender?



...agree that everyone should have access to equal rights regardless of race, religion, sexuality, gender and citizenship?



CONFIDENCE IS MORE THAN JUST A #SELFIEMONDAY

While individuality may be celebrated (and protected) amongst Gen Z, it can still be a point of contention amongst the group.

As the first digital natives, Gen Z has grown up in an online world that is every bit as real as the “real world.” Because of this, Gen Z has become very concerned with how they look, which, perhaps, is the reason why they have become known for

being such a “vain” generation. It goes deeper than that, though. According to Business Insider¹, Gen Z is the most photographed generation yet, they just can’t seem to escape the camera. A full **44%** of Gen Z told us they



“I have opted out of cool class activities such as volunteering to do anatomy experiments with kids from high school because I was nervous the kids would judge me for something I said, how I laugh, or how I look.”

¹www.businessinsider.com/gen-z-most-photographed-generation-changes-shopping-habits-2019-6

CONFIDENCE IS MORE THAN
JUST A #SELFIEMONDAY

have opted out of extracurricular activities due to the way they look while **25%** of Gen Z have opted out for fear of themselves being recorded/photographed and posted on the Internet.

When asked to elaborate on some of their concerns in regards to their confidence and social media, one Generation Wattpad member

said, "I have opted out of cool class activities such as volunteering to do anatomy experiments with kids from high school because I was nervous the kids would judge me for something I said, how I laugh, or how I look." Another member said, "Last year [at my school] there was an account on Instagram that had cyber bullied tons of students and although the account has been deleted there are still a lot of terrible students at my school and I fear being attacked by them."

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A lack of self-confidence seems to be a common concern amongst Gen Z, which often happens when only one type of media representation is considered "valid." It's difficult to have confidence in one's individuality and unique characteristics when society keeps telling you those traits are wrong or unattractive.

A MENTAL HEALTH EPIDEMIC

Unsurprisingly, it can be hard to hear that something is wrong with your generation, day in and day out. As a whole, **16%** of Gen Z have experienced mental illness, and **47%** identify with experiencing mental health challenges. The most commonly diagnosed mental health challenges within this generation are depression and anxiety. Part of this epidemic seems to stem from the pressures of growing up and the constant expectation to succeed.

Making the transition from childhood to adulthood can be a difficult one, especially in a stage of your life where you're unsure of what you want to do or who you want to be. A whopping **74%** of Gen Z said they agreed or strongly agreed with the following statement: "I feel [or felt] overwhelmed navigating the transition from being a teenager to an adult."

When it comes to finding the support they need, **71%** of Gen Z turn toward religion or spirituality while **88%** say they have at least one close friend they can share their personal troubles with.

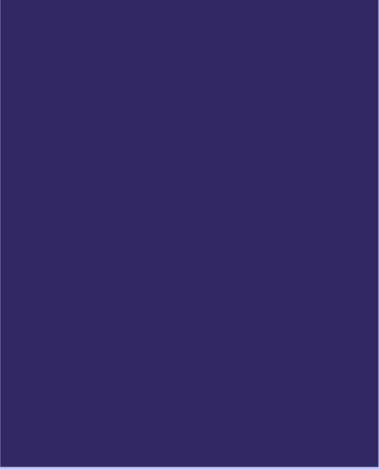


As the first digital natives, Gen Z are faced with the reality of seeing “success” in a variety of forms within their Internet world. The pressure can mount, quickly becoming overwhelming and causing a direct need for personal support. When it comes to finding the support they need, **71%** of Gen Z turn toward religion or spirituality while **88%** say they have at least one close friend they can share their personal troubles with.

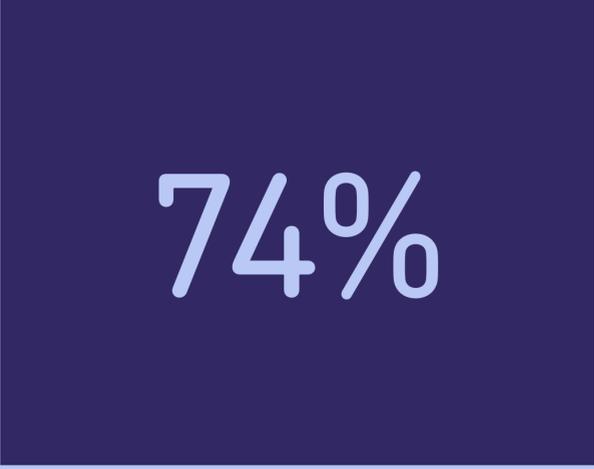
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GEN Z HOPES FOR THE FUTURE

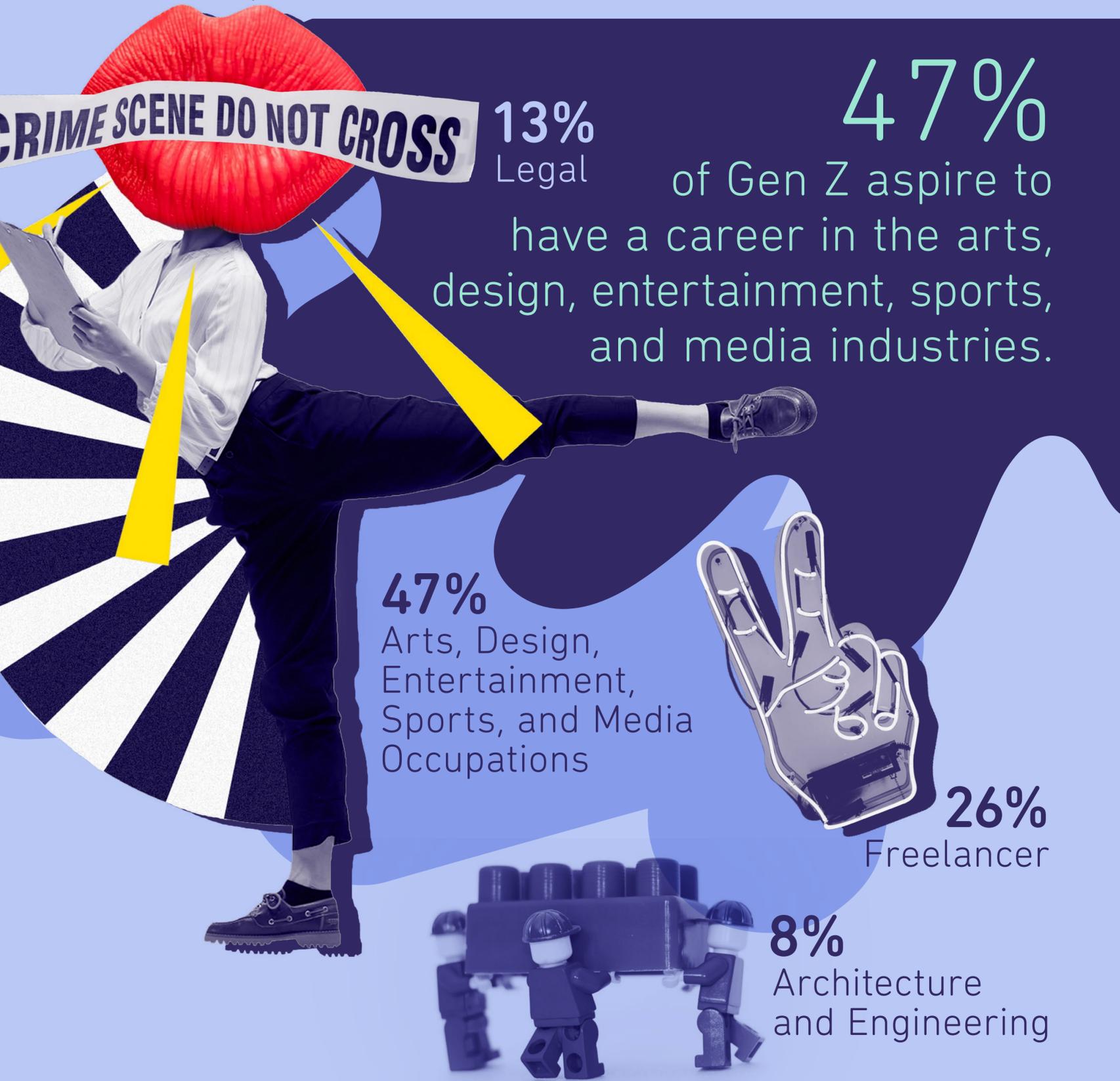
As noted, Gen Z have faced extreme pressure to succeed. They have been raised by Gen X, a generation born between 1965-1980 (39-54 years old) commonly known as the “cynics”. Many of them fell out of job security during the recession and they encourage their children to strive for society’s definition of “stability.” For this reason, Gen Z is fairly aspirational, but this shouldn’t be mistaken for being overly confident in

12% of Gen Z have aspirations to become an influencer, a career path that has only recently gained traction in the past decade.

their ability to find success. The idea of basing your life goals and dreams around the thoughts you have as a teenager can be terrifying. What if you grow up to hate your job? Or what if you realize you’re no good at what you picked at sixteen? It’s a difficult choice to make.

“There's this push to be CEO or some type of manager/overseer and the only fields worth pursuing are business, medicine, and STEM.”

Career Aspirations



Despite the pressure from their parents, Gen Z remain cautiously optimistic about their aspirations.

On a scale from 1 to 10, Gen Z said they feel a **6.2** in terms of feeling pressure from parents, teachers, peers, and society to succeed. A member of Generation Wattpad said, "Society [puts] pressure to choose a stable career [in general]." Much like previous generations before them, Gen Z feels immense pressure to achieve stable careers in medical and law fields. Another member said, "There's this push to be CEO or some type of manager/overseer and the only fields worth pursuing are business, medicine, and STEM."

However, unlike said previous generations **47%** of Gen Z still aspire to have a career in the arts, design, entertainment, sports, and media industries (when asked to select all that apply).

"Society [puts] pressure to choose a stable career [in general]."

More interestingly, despite the pressure for stability, plenty of Gen Z aspire to be their own boss and work as a freelancer, controlling their schedule and work-life balance without the looming figure of a boss. However, many see the notion of pursuing freelance work full time to be a career risk in terms of its stability and longevity, and with the pressure from society to have traditional careers, they may choose to gain stable full-time jobs and pursue their passions as a side hustle. Surprisingly, **12%** of Gen Z have aspirations to become an influencer, a career path that has only recently gained traction in the past decade. Meanwhile as a whole, power/influence is their least important career motivator.

Career Aspirations

12%
Influencer

15%
Healthcare
Practitioner
and Technical

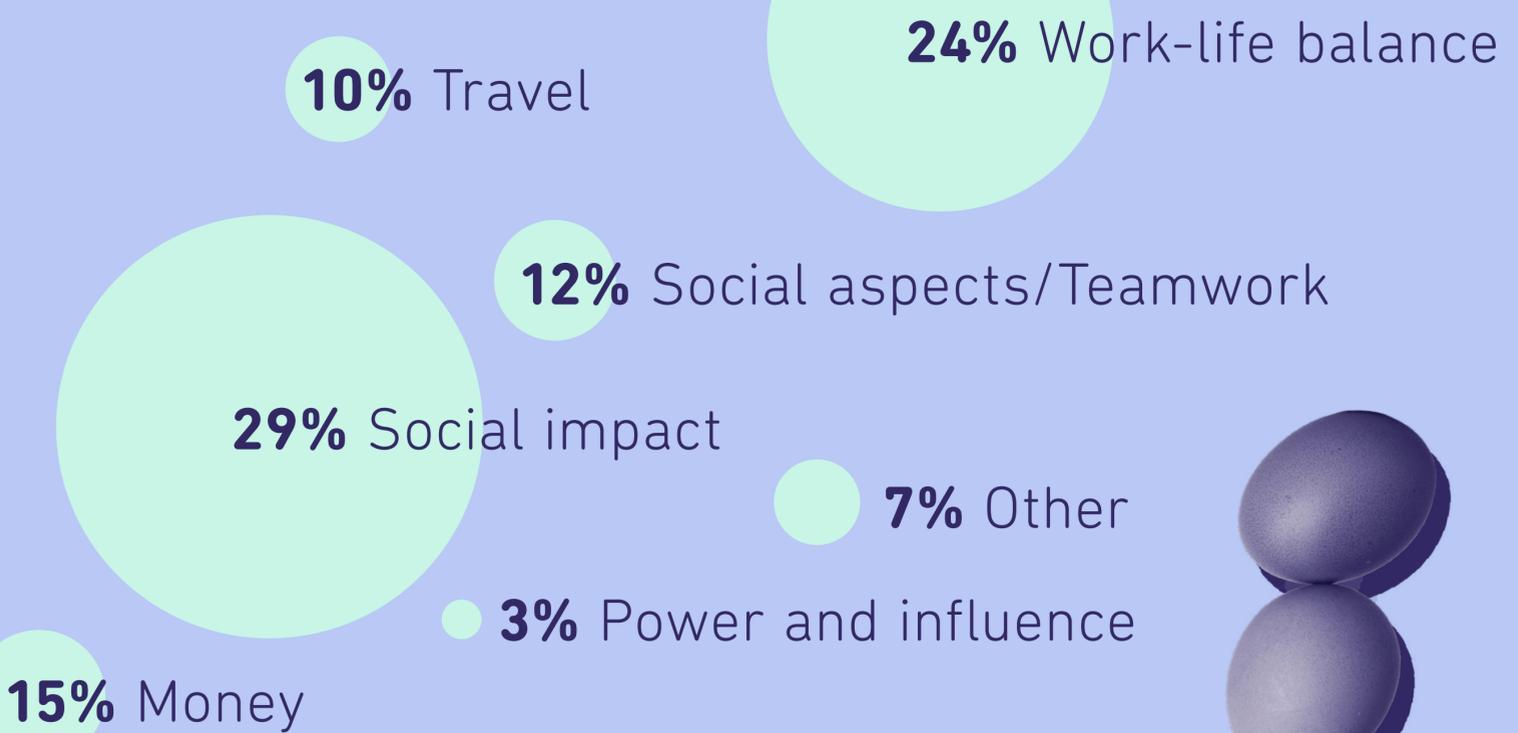
12%
Community
and Social
Service

10%
Business and
Financial

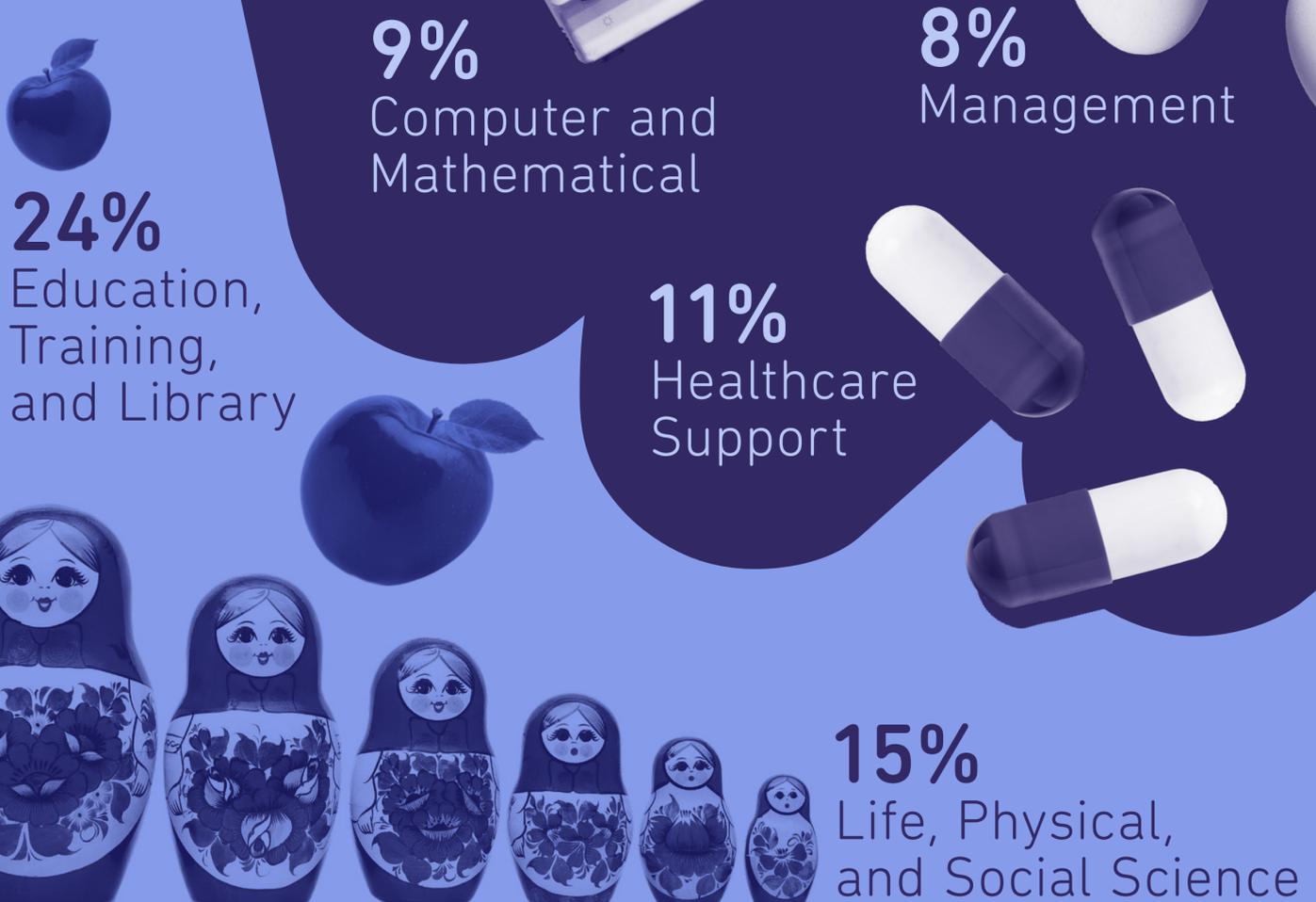
GEN Z HOPES FOR THE FUTURE

Despite the pressure from their parents, Gen Z remain cautiously optimistic about their aspirations. Only **12%** feel unsure of which career path they would like to pursue in general. Taking this a step further, only **15%** of Gen Z feel that money is the main motivator for their future career. The most important motivator for their career is social impact--making a difference by working for a company that truly cares is **29%** of Gen Z's greatest aspirations.

Career Motivators



Career Aspirations



MARKET TO THE INDIVIDUAL

Understanding Gen Z requires an empathetic point-of-view. They are a generation not only looking to be seen but also to be heard. Remember that Gen Z's identity is dynamic, never static. Their individuality is rooted in a deep amount of context, typically an exploration of intersectionality between multiple identities. Striving for better representation in marketing and allowing Gen Z to see themselves in the face of their favourite brands would invoke confidence and a deeper connection. Gen Z's attitude toward equality is a powerful indication in regards to the types of marketing Gen Z reacts strongly to.



As they are a colorful mosaic, representation of Gen Z is not a one size fits all solution. They are discerning in regards to which brands deserve their attention and support, thus marketers need to be aware of what they're putting out there and who it's for. It's not enough to capitalize on trends or hop on bandwagons,

as Gen Z can tell the real from the fake. The real isn't always beautiful, nor does it need to be presented that way, but so long as the real is represented we can strive to make a change for the better. Already, pop culture is striving toward making a difference with the types of representation given—take for example the diverse cast of HBO's *Euphoria*, or Netflix's children's series *Julie's Greenroom*, which gives representation to children of colour, children with disabilities, and children who are gender non-conforming. While we could consider these to be "trends," they aren't trends to be taken lightly.

In order to create a genuine connection with Gen Z, brands need to care about celebrating the differences that make everyone an individual. Don't just market your brand, help Gen Z market themselves. Running a successful brand of the future, marketers should expect to not only mimic the values of their audience but learn to understand those values and why they're important. As a social platform, Wattpad is home to the most diverse and inclusive group of Gen Z on the internet. Our previous research (such as **JOMO: The Joy of Missing Out – How Gen Z is finding balance in an upside down world**) revealed to us that they come to Wattpad because they can be their most authentic selves without fear of criticism or exclusion. It's no wonder, then, that brands who want to reach a diverse, Gen Z audience, are looking to Wattpad. It's the platform where 80 million monthly users go to find their voice and connect through the power of story. As a community, Wattpad is home to virtually every background, belief, and identity, and a place where anyone in the world, from LGBTQ+ people to racial minorities, can find a community that represents themselves.

WANT TO REACH GEN Z? WORK WITH A GEN Z-FIRST COMPANY.

To learn how some of the world's top brands have tapped into the diverse and positive community on Wattpad, from T-Mobile's #UnlimitedPride write-a-thon to National Geographic's #PlanetOrPlastic global writing contest, get in touch.

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