The
GENERATION Z
Study of Tech Intimates

COMMSCOPE®

Introducing...

The Always-On Generation

This study of Generation Z is an annual initiative created to better understand the emerging technology, network and communication needs of today's savviest generation. Reflecting the perspectives of eight tech-leading cities around the world, the findings here can inform your strategy, product development and activation.

Research Scope

4,000+ Consumers

12 One-on-one interviews

13-22 Years old

The Landscape

Connectivity trends and usage statistics from key global markets

Broadband

Total Subscribers

HK	ARG	IN	SKR	UK	GER	JPN	USA
2,850,000	7,350,000	18,700,000	21,413,430	25,720,000	32,506,000	87,200,000	108,325,000
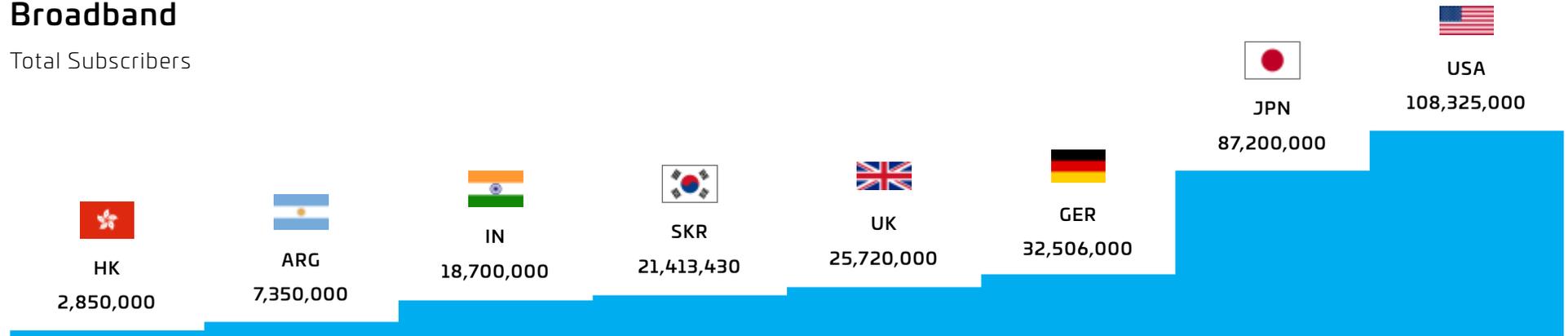
96% OF **GEN Z** OWNS A **SMARTPHONE**

60% OF **GEN Z WILL NOT USE** AN APP OR WEBSITE **IF TOO SLOW** TO LOAD

74% AVERAGE PERCENTAGE OF **GEN Z'S TIME SPENT ONLINE** (Outside of school or work)

2/3 OF GEN ZERS ARE INTERESTED IN **PURCHASING VIA SOCIAL MEDIA** DIRECTLY

PERCENTAGE OF THE **POPULATION** THAT IS **GEN Z**

26% 2015 → **33%** 2020

THE AMOUNT **GEN Z** CONTRIBUTES TO THE **U.S. ECONOMY**

$44 BILLION

25% → **40%**

GEN Z CURRENTLY MAKES UP **25% OF ALL CONSUMER SPENDING**, AND THAT IS EXPECTED TO **GROW** TO **40%** IN THE **NEXT DECADE**

Wireless

Total Subscribers

HK
13,304,000

ARG
61,607,800

SKR
62,345,000

UK
90,534,000

GER
121,150,800

JPN
163,113,000

USA
346,253,464

IN
1,186,805,343
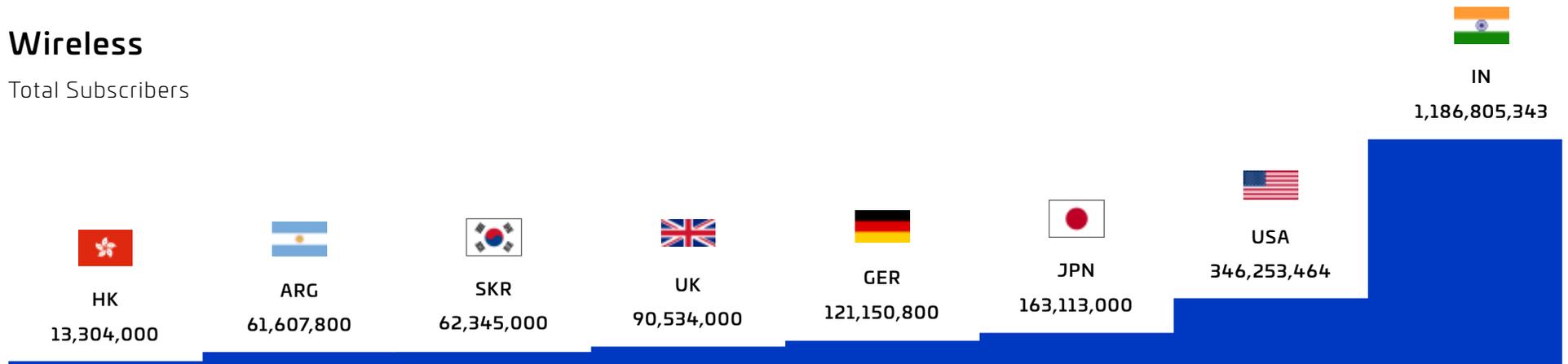
53 Mbps

27.5

BROADBAND SPEEDS WILL NEARLY **DOUBLE** BY 2021

WIRELESS AND MOBILE DEVICES WILL ACCOUNT FOR MORE THAN **63%** OF TOTAL **IP TRAFFIC** BY 2021

INCREASE IN GLOBAL MOBILE **DATA TRAFFIC** 2016-2021 **7X**

VIRTUAL REALITY (VR) AND **AUGMENTED REALITY** (AR) **TRAFFIC** WILL **INCREASE 20-FOLD** BETWEEN **2016** AND **2021** GLOBALLY, A **CAGR** OF **82%**
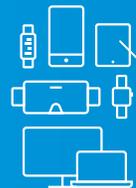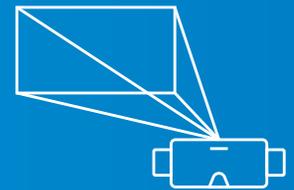
3X THE NUMBER OF **DEVICES CONNECTED** TO IP NETWORKS WILL BE MORE THAN THREE TIMES THE GLOBAL POPULATION BY 2021

Time
WHEN

Place
WHAT

Attitude
WHY

Territories

This year's study has identified three key territories to help better understand the tech intimate mindset of Gen Z.

Temporal, fleeting and fast, Gen Z sees time as currency.

A virtualized, hyperconnected ecosystem where Gen Z feels at home.

Obsessive, tech savvy and attached, Gen Z finds fulfillment in their devices.

TIME
as currency

> Gen Zers use their devices to spend, save and waste time, increasing usage and keeping an always-on mindset.

USAGE

FREQUENT ACTIVITIES

FAVORITE APPS

FUTURE ACTIVITIES

DICHOTOMIES

Gen Z is the mobile-first generation that appears to live equally in the digital world as in the real one. Smartphones, the devices of choice, are always close by and within reach. With a phone to keep them connected, Gen Z is full of dichotomies: their device distracts them from boredom and gives them something to do during downtime, yet it saves time by being efficient. It entertains them and it also empowers them. It is appealing, but distracting. Usage habits continue to increase, with a quarter checking their phones 30 times an hour. While usage is on the rise, it is becoming more specialized and occasion-specific for Gen Z. Daytime is different from nighttime, usage during weekends or summers away from school contrasts with that of weekdays. Replacing their phones every two years, Gen Zers prioritize faster internet speed and faster service as the most important features in a new phone, highlighting their need to be always on.

Usage

NUMBER OF TIMES SMARTPHONE IS CHECKED IN A TYPICAL HOUR

30 OR MORE
24%

25-29
2%

20-24
14%

15-19
8%

5-9
27%

10-14
25%
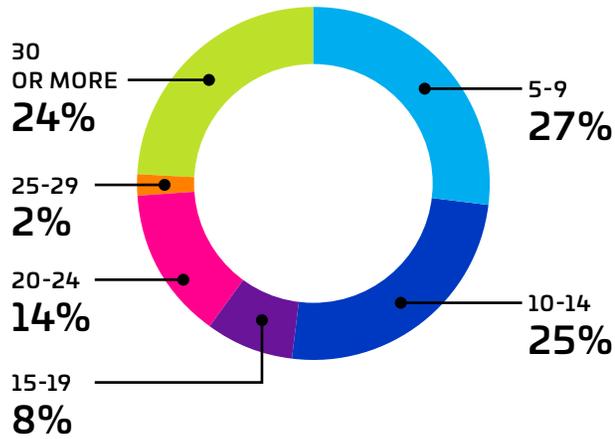
Frequency plays a key role in how Gen Z operates. Their phone is their primary device, and has become an extension of themselves. On average, Gen Z checks their smartphones every three minutes, although a quarter check every two minutes or more. Furthermore, 70 percent of Gen Zers that check their phones 30+ times an hour are 18-22.

NUMBER OF TIMES SMARTPHONE IS CHECKED IN A TYPICAL HOUR BY CITY

		Checks smartphone 30+ times/hour	Checks smartphone <30 times/hour
🇯🇵	TYO	**23%**	15%
🇰🇷	SEL	20%	16%
🇺🇸	NYC	16%	14%
🇬🇧	LDN	15%	13%
🇮🇳	BLR	9%	**21%**
🇭🇰	HK	7%	12%
🇦🇷	BA	6%	5%
🇩🇪	BER	4%	5%

From a global perspective, Tokyo has the highest percentage of Gen Zers who check their phones more than 30 times per hour. Bangalore has the highest percentage of those who check their phones fewer than 30 times per hour.

INCREASE IN DEVICE USAGE COMPARED TO A YEAR AGO

📱	Smartphone	**78%**
💻	Laptop/desktop	**42%**
📱	Tablet	**24%**
⌚	Smartwatch	10%
▭	Fitness tracker	8%
🔲	VR device	7%

Close to 80 percent indicate they are using their smartphones more than they were a year ago, and this behavior is increasing across all devices, including laptops, tablets and fitness trackers.

Frequent Activities

PERCENTAGE OF DAILY PARTICIPATION IN ACTIVITIES BY CITY

New York, Berlin and Buenos Aires have the highest percentages of Gen Zers that listen to music daily, while Hong Kong has the lowest. Rates of Gen Zers that text daily are highest in New York, London, Seoul and Buenos Aires, and lowest among those in Hong Kong and Berlin.

		TOTAL	NYC	LDN	BER	BLR	HK	TYO	SEL	BA
	Listening to music	69%	79%	70%	73%	70%	55%	66%	69%	73%
	Texting	68%	82%	74%	61%	67%	47%	65%	70%	77%
	Playing games	59%	60%	55%	58%	51%	57%	65%	67%	57%
	Watching videos	56%	59%	55%	42%	60%	46%	57%	59%	49%
	Using text-based apps	48%	53%	47%	37%	45%	37%	69%	35%	50%

Replacing smartphones every two years is the most common practice, consistent with a typical contract length.

44%

of all respondents get a new phone every two years
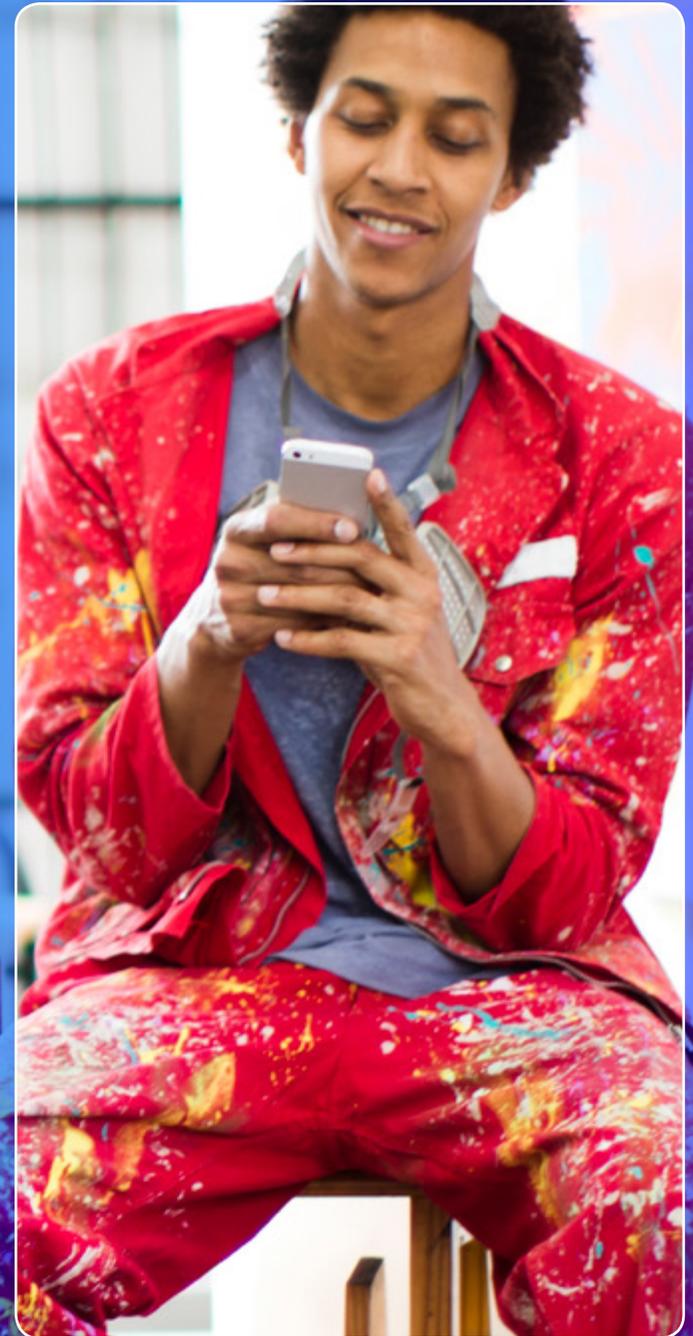
Favorite Apps

APPS USED MOST OFTEN

	TOTAL	🇺🇸 NYC	🇬🇧 LDN	🇩🇪 BER	🇮🇳 BLR	🇭🇰 HK	🇯🇵 TYO	🇰🇷 SEL	🇦🇷 BA
YouTube	**56%**	53%	55%	52%	63%	40%	51%	**71%**	52%
WhatsApp	**47%**	8%	37%	80%	78%	43%	76%	5%	**81%**
Facebook	**38%**	33%	26%	29%	**64%**	52%	5%	53%	36%
Instagram	**30%**	**49%**	47%	43%	17%	27%	23%	15%	46%
Twitter	**22%**	18%	12%	6%	11%	12%	**60%**	18%	16%
Snapchat	**20%**	**54%**	51%	34%	7%	11%	1%	1%	14%
Google apps	**19%**	19%	9%	11%	**29%**	28%	16%	18%	10%
Venmo	**14%**	2%	0%	1%	1%	2%	1%	**74%**	0%
Apple apps	**13%**	23%	15%	2%	8%	**24%**	11%	10%	2%
Spotify	**9%**	19%	21%	**23%**	2%	3%	2%	1%	18%
Uber	**2%**	3%	1%	1%	2%	**7%**	1%	1%	1%
LinkedIn	**2%**	2%	2%	1%	2%	**4%**	0%	1%	1%

APPS USED MOST OFTEN BY AGE

YOUTUBE — 71%, 65%, 51%
WHATSAPP — 38%, 53%, 46%
INSTAGRAM — 34%, 26%, 31%
FACEBOOK — 30%, 38%, 40%
SNAPCHAT — 26%, 18%, 19%
TWITTER — 21%, 20%, 22%
GOOGLE APPS — 18%, 19%, 19%
VENMO — 15%, 14%, 13%
APPLE APPS — 13%, 10%, 14%
SPOTIFY — 10%, 6%, 9%

AGE 13-15
AGE 16-17
AGE 18-22

Overall, YouTube is the most commonly used app, although it tops the list only in London. There are some regional variations, with WhatsApp popular in Bangalore, Berlin and Buenos Aires. Facebook is strong in Bangalore, Hong Kong and Seoul. Snapchat has replaced the popularity of Facebook in New York, London and Berlin. Venmo is extremely popular in Seoul.
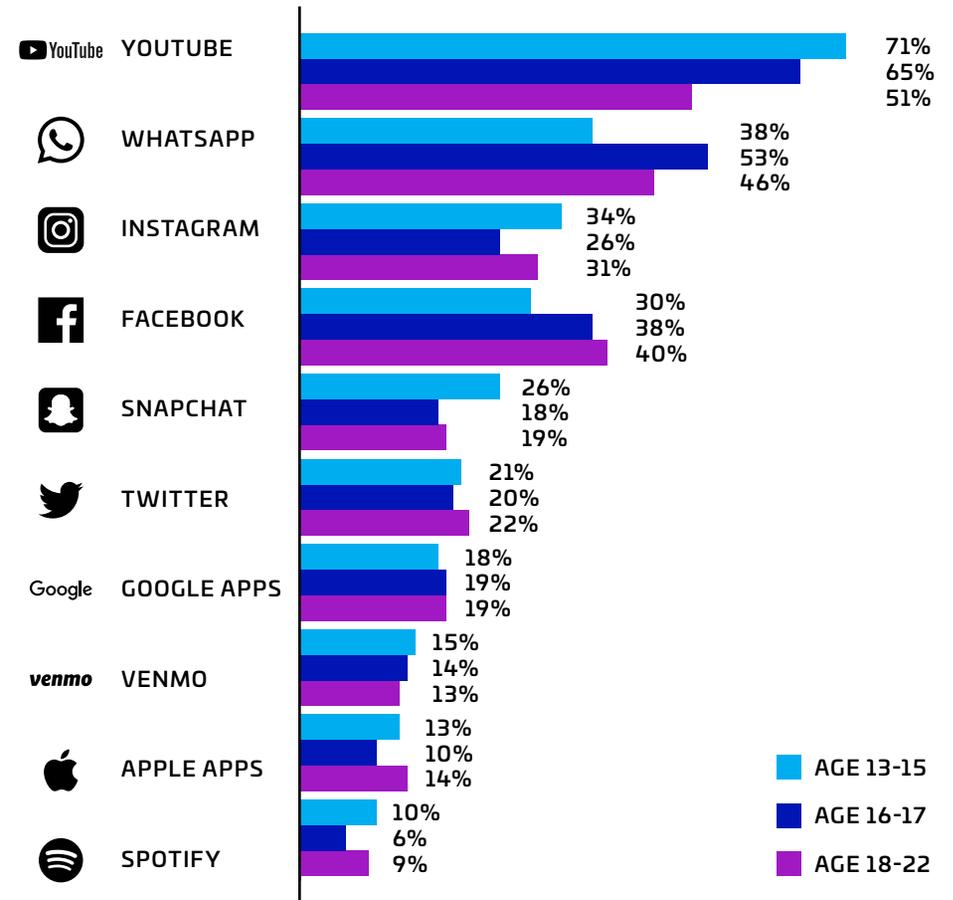
When looking at app usage by age, those under 18 are more likely to use YouTube. WhatsApp and Facebook skew usage to 16- to 22-year-olds, while Snapchat seems more popular among those ages 13 to 15.

Future Activities

MOST IMPORTANT FEATURES IN A NEW SMARTPHONE

23% Faster internet speed

15% Faster service
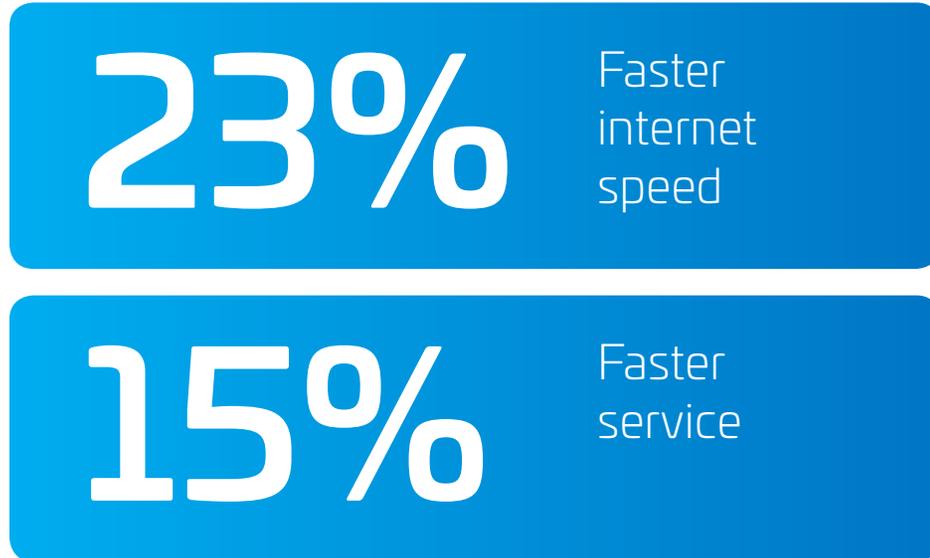
Desired future features for Gen Z relate to speed, another component of time. This highlights their need to be connected to faster internet all the time.

EXTREMELY/VERY LIKELY TO PARTICIPATE IN THE NEXT 2-3 YEARS

|	
GETTING ACCESS TO EVENTS OR TRAVEL	**26%**
MANAGING PERSONAL FINANCES, SHARING MONEY	**26%**
RESEARCH (HOMEWORK OR WORK)	**26%**
SELF-IMPROVEMENT	**25%**
SEARCHING FOR INFORMATION OR MAPS/GPS	**25%**
RIDE SHARING	**25%**
USING IMAGE-BASED SOCIAL APPS	**23%**
LISTENING TO AUDIOBOOKS	**22%**
READING (NEWS/EVENTS)	**22%**
USING TEXT-BASED SOCIAL APPS	**22%**
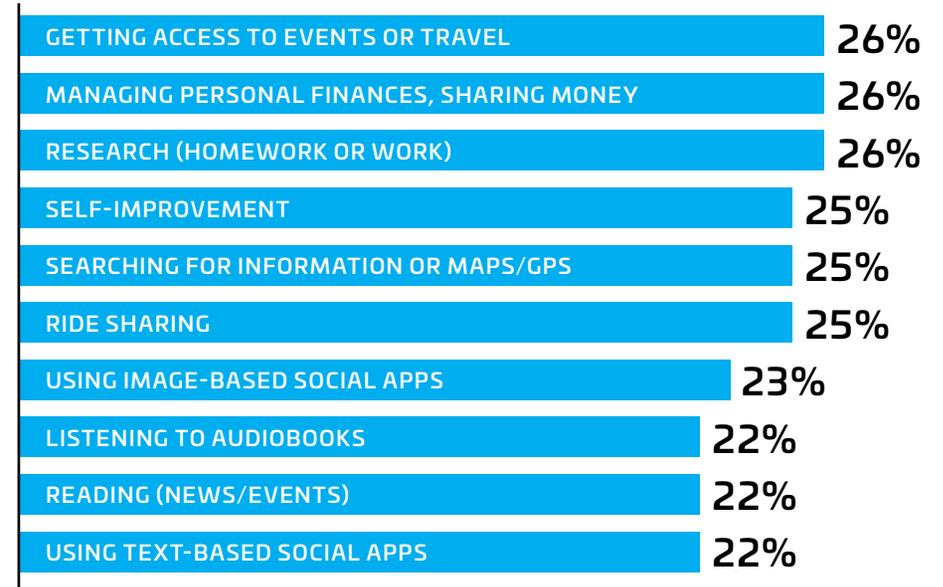
Interesting, although the least common now, transactional activities like ride sharing and managing personal finances emerge as the most likely services Gen Z will adopt in the next two to three years. This indicates an increase in the number of activities in which Gen Z will participate, with a focus on saving time.

Dichotomies
Distracted vs. Efficient

Gen Z seems adept and astute regarding the value of time, and use their device(s) as a means to an end. It helps them kill time as well as be more efficient and entertained. Gen Z seems to understand the siren call of their phones, although they often feel ill-equipped to fight it and can be conflicted about the relationship with their smartphones.

FUN, FIGHTS BOREDOM

PLAYING GAMES

TEXT-BASED SOCIAL APPS

LISTENING TO MUSIC

IMAGE-BASED SOCIAL APPS

WATCHING VIDEOS/ MOVIES/ TV

TAKING PHOTOS/VIDEOS

AUDIOBOOKS

SAVES ME TIME

READING

RESEARCH

TEXTING

ONLINE SHOPPING

VIDEO CHATTING

EMAILING

SEARCHING FOR INFO

RIDE SHARING

MANAGING PERSONAL FINANCES

ACCESS TO EVENTS

🇺🇸 "It makes me feel more efficient."

🇸🇪 "I feel myself getting very absorbed and distracted."

🇰🇷 "Sometimes I love it and all the things I can do... sometimes I feel like I get sucked into my phone a little too much."

🇸🇪 "The phone can make me less bored, happier, more connected, but it can make me stressed."

Dichotomies
A.M. vs. P.M.

Device usage has certain patterns among Gen Z. Checking messages and social media is associated with first-thing-in-the-morning activities, while watching videos and TV is a preferred nighttime activity.

IN THE MORNING

"Within an hour of waking up I've checked social media, Instagram, Facebook…"

"Immediately. I look through Snapchat and texts to see if anyone wants anything."

"I go on my social sites, before school."

"First thing I do in the morning is check Snapchat, scroll Instagram and see if I have new notifications."

**AT NIGHT**

"The last thing I do on my phone—watch something like Netflix."

"Watch TV, turn it off and go to sleep."

"I like to watch a little bit of YouTube before I sleep."

"Watch YouTube."

Dichotomies
In or Out of School

Not surprisingly, usage tends to increase when Gen Z is not attending school.

WEEKDAYS VS. WEEKENDS

"Weekdays it's less and weekends definitely more…"

"If I have a lot of spare time, I use it more."

"… My usage changes a lot. On weekends or holiday, I'll go on it a lot more…"

"I definitely use my phone more on the weekends."

SEASONS

"During summer, 4-5 hours, during the school year, maybe 2 hours."

"In summer, 5 hours total. During the school year, 30 minutes before school, and an hour at night."

"Since I'm not in school it's probably more now, I'd say 3-4 hours."

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TIME
as currency

Takeaways
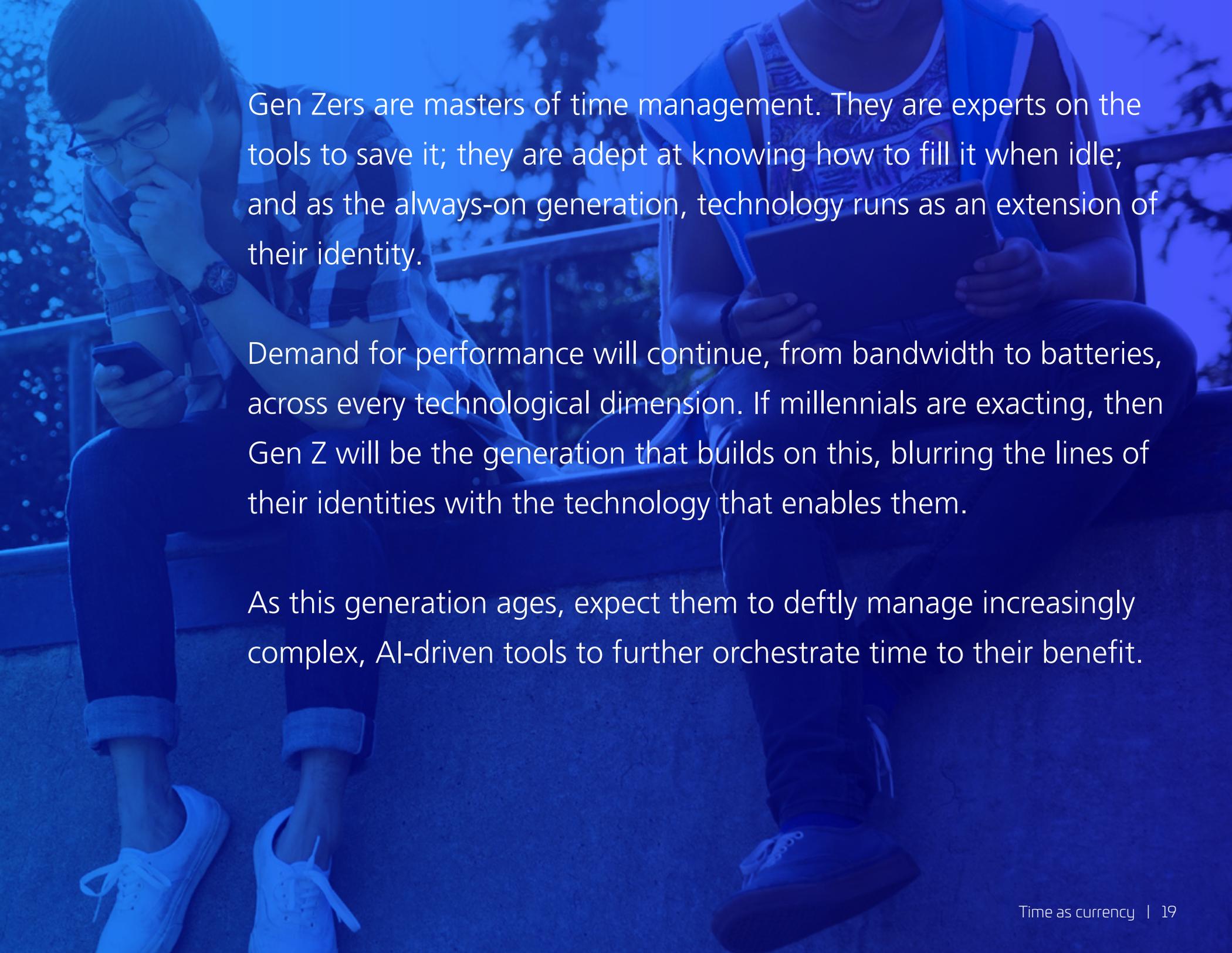
Gen Zers are masters of time management. They are experts on the tools to save it; they are adept at knowing how to fill it when idle; and as the always-on generation, technology runs as an extension of their identity.

Demand for performance will continue, from bandwidth to batteries, across every technological dimension. If millennials are exacting, then Gen Z will be the generation that builds on this, blurring the lines of their identities with the technology that enables them.

As this generation ages, expect them to deftly manage increasingly complex, AI-driven tools to further orchestrate time to their benefit.

PLACE
a hyperconnected ecosystem

A virtualized world where enhancement, entertainment and expression dominate.

HYPERCONNECTED

**ENHANCING**

ENTERTAINING

EXPRESSIVE

BONDING

The smartphone is the social hub of Gen Z, the epicenter of everything. It creates a universe, a virtualized space where they engage, making them smarter, more effective and more connected. Gen Zers want their connections to work well and quickly. In this space, they are entertained through activities like music, gaming or texting. Importantly, within their "bubble," Gen Zers also express themselves to friends through creating and sharing content frequently. The only requirements in this hyperconnected ecosystem are a device and a Gen Zer. They have formed a strong attachment, the phone is always close by and hard to live without.

Hyperconnected

Gen Z expects and values always-on/always-available internet access. They are most satisfied with their internet speed at home. Moving away from home, they are less pleased, especially on the go. Living in a virtual world creates frustrations for them when connectivity speeds can't keep up. They behave the same way wherever they and their devices are, regardless of location since, for them, the "place" is defined by where they and their phones are, not a specific geography or location.

EXTREMELY/VERY SATISFIED WITH SPEED OF INTERNET SERVICES

70%

41%

38%

36%

35%

HOME

WORK OR SCHOOL

SHOPS/ RESTAURANTS

PUBLIC OUTDOOR SPACES

ON THE GO

41%
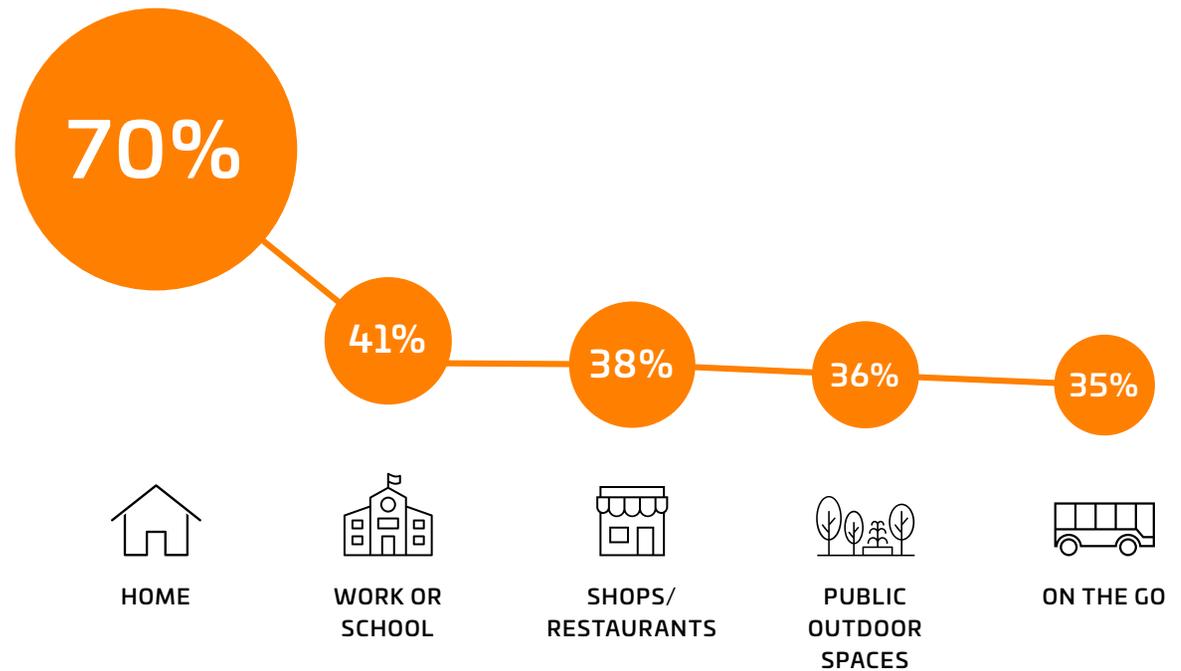
Associate searching for information with saving time

39%

Associate texting with staying connected to others

27%

Associate reading with making them smarter

Enhancing

PERCENTAGE THAT SAYS ONLINE ACCESS IMPACTS THEM A LOT

	Total
Who you socialize with (other connected people)	**50%**
The kinds of products you purchase	**49%**
Where you go on vacation	**48%**
How you make purchases	47%
How you live/will live in the future	42%

The ability of technology to help make Gen Z smarter, more capable and more connected is a core part of how they live their lives. Access to the internet impacts everything from who they socialize with and the products they buy to where they go on vacation.

PERCENTAGE INTERESTED IN A NEW TECHNOLOGY

44% Virtual reality

41% Artificially intelligent personal assistants

39% Driverless cars

Virtual reality is the technology Gen Z is most interested in learning more about, followed by artificially intelligent personal assistants and driverless cars. All three of these technologies further the idea of enhancement, making them more effective and efficient.

Their devices can clearly be seen as enhancing life.

"It enhances my social life... it definitely helps it."

"I can reach out to anyone at any time, anywhere."

"It's great to have unlimited information at my fingertips."

Entertaining

ACTIVITIES CONDUCTED ON A SMARTPHONE/TABLET

| Activity	Percentage
♫ LISTENING TO MUSIC	82%
🎮 PLAYING GAMES	76%
📷 TAKING PHOTOS/VIDEOS	76%
💬 TEXTING	74%
▶ WATCHING VIDEOS/MOVIES/TV SHOWS	72%
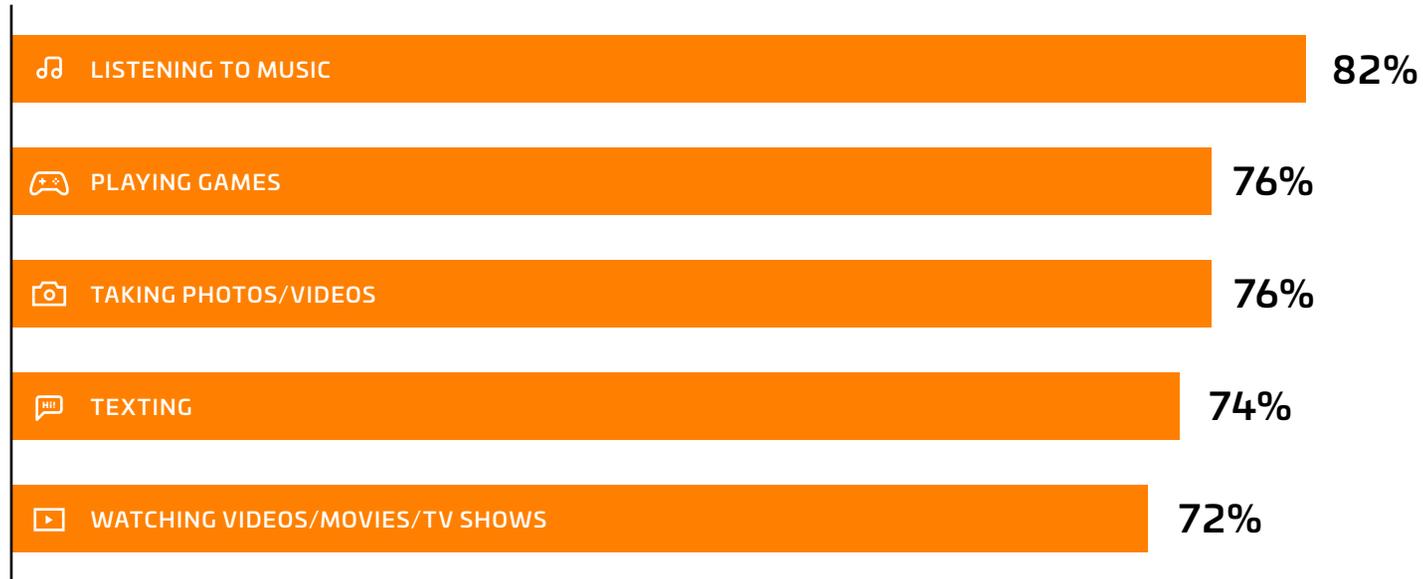
Listening to music is the most common activity on a mobile device, with over 80 percent participating. This highlights the importance of entertainment on a frequent basis. Playing games and watching videos, also entertainment-based activities, rank in the top two and five, respectively.

Expressive

CREATE AND SHARE CONTENT WITH OTHERS

52%
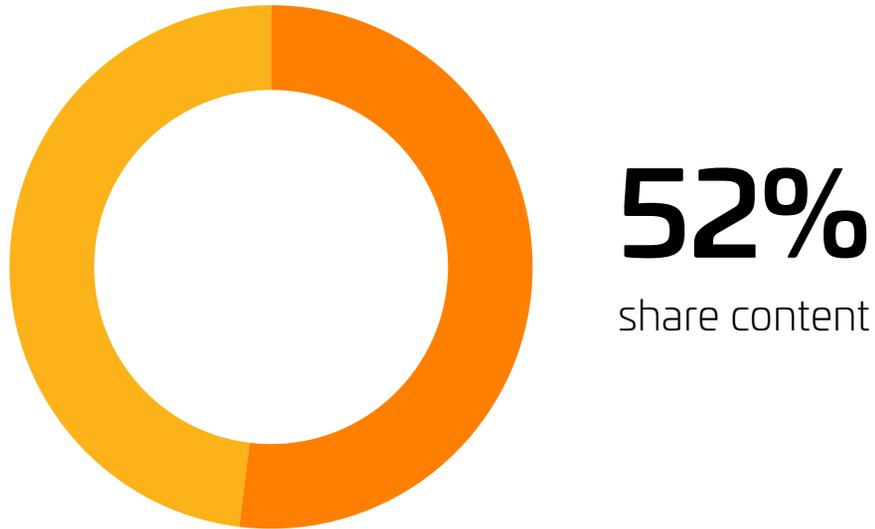
share content

This is an expressive and prolific generation. More than half of Gen Z report creating content that they share with others. Content sharing is particularly strong in Bangalore and Berlin.

HOW GEN Z SHARES CONTENT

THROUGH ONLINE PLATFORMS **71%**

THROUGH APPS **59%**

THROUGH OWN WEBSITE **30%**

SOME OTHER WAY **10%**
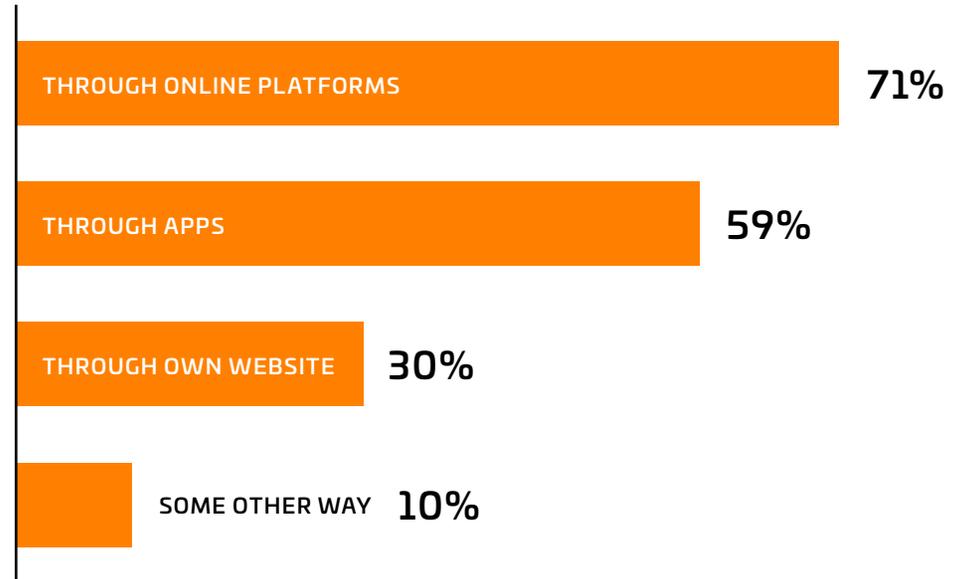
Social platforms are the most commonly used method to share content. Interestingly, 30 percent host it on their own websites.

Expressive

Content is frequently shared and considered important by just under half of all respondents.

43%

create content weekly or more often

45%

view sharing content as important
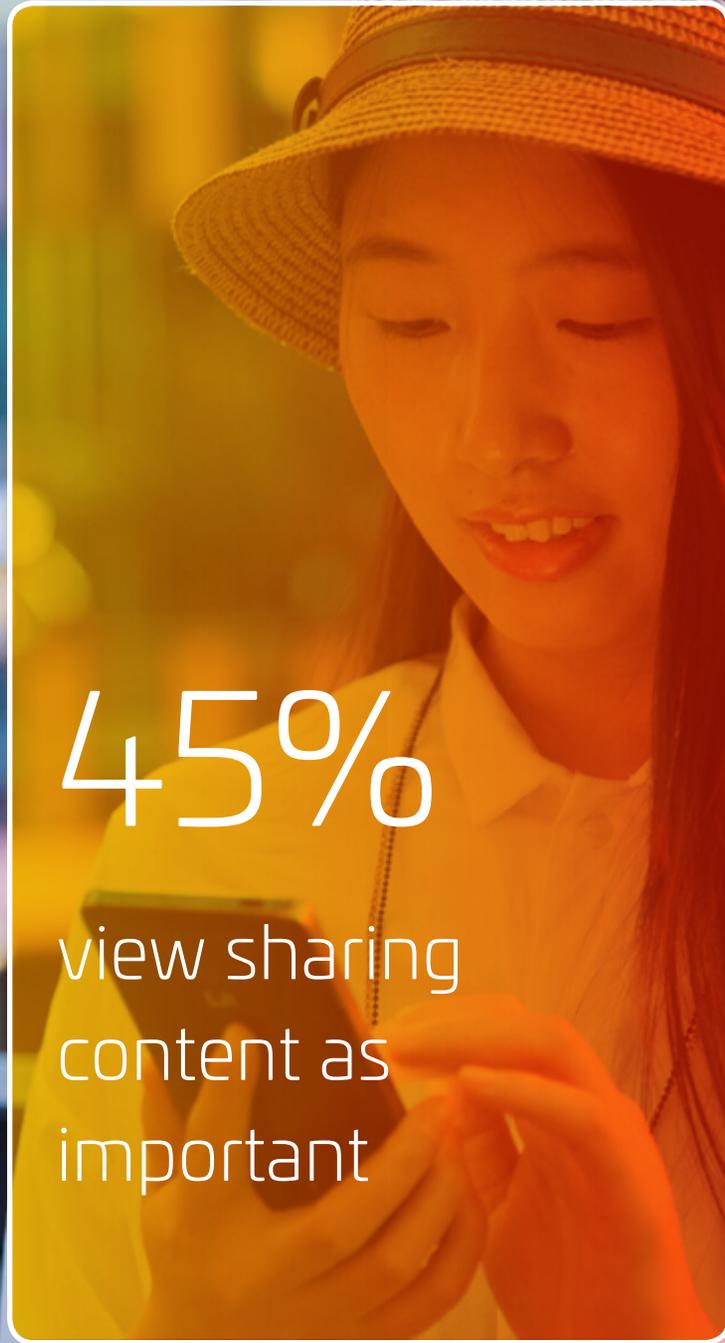
Expressive

TYPE OF CONTENT CREATED

PHOTOGRAPHS	**69%**
VIDEOS	**51%**
WRITTEN POSTS	**51%**
TEXT MESSAGES	**49%**
MUSIC/AUDIO RECORDINGS	**39%**
SOME OTHER TYPE OF CONTENT	**9%**
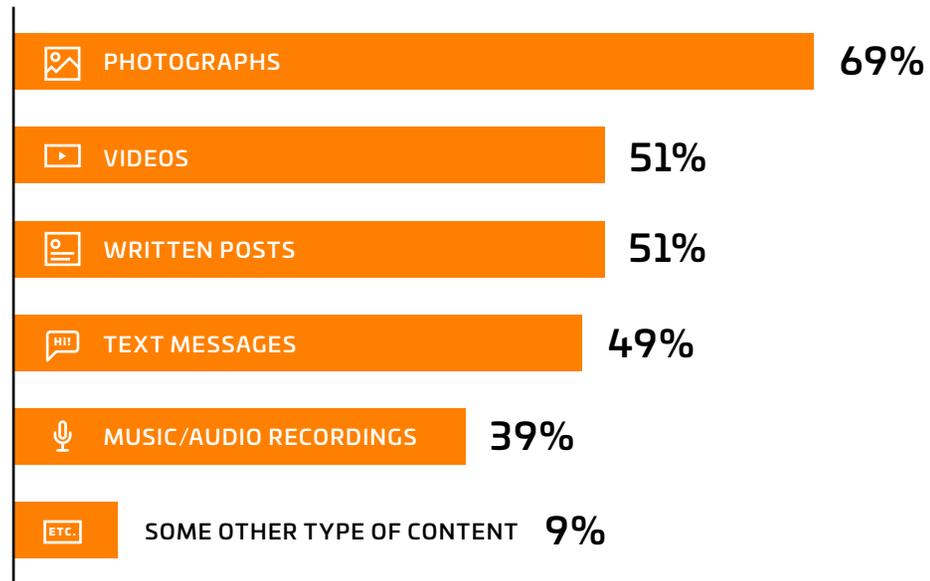
Photographs are the most popular type of content created and shared. More than half of Gen Zers create videos and write posts that they also share.

Content sharing and being connected also highlight the collective orientation many in Gen Z have, both among their friends and in the broader internet-as-community idea.

🇺🇸

"What I put out on social media impacts how other people think of me."

🇺🇸

"I like being connected to all my friends... faster."

🇰🇷

"It can be a great way to meet new people."

🇬🇧

"Relationships are affected in a good way."

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Bonding

DIFFICULT TO LIVE WITHOUT

Gen Z reveals how connected they feel to their devices. They are hard to do without.
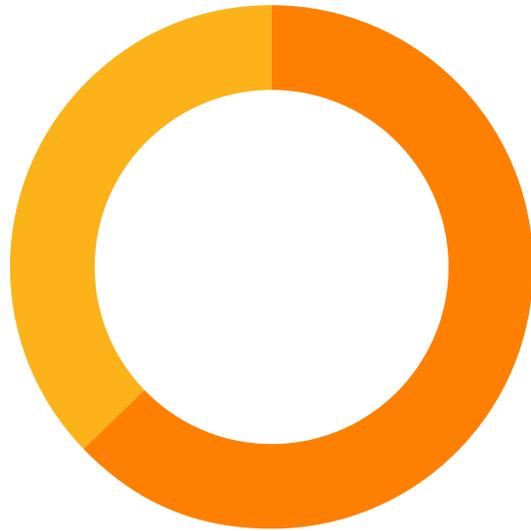
63%

would find it extremely difficult to live without their smartphones

"… When I'm home, my phone is basically my social life."

"My device is a vital part of my life…"

"I'm dependent on my phone."

"It keeps me more connected to the world."

Bonding

A Gen Zer's smartphone is not only something they feel close to, it's something they keep close to them. It is at the center of their interactions and is seen as a friend and a fortress.

🇺🇸

"It's always with me, wherever I go..."

🇬🇧

"It's always with me."

🇬🇧

"... I never leave it behind. It's always on me, or in my bag."

🇰🇷

"It's with me everywhere, even in the shower... When it's not with me I feel nervous."

▶ Click to view our video interviews

PLACE
a hyperconnected
ecosystem

Takeaways
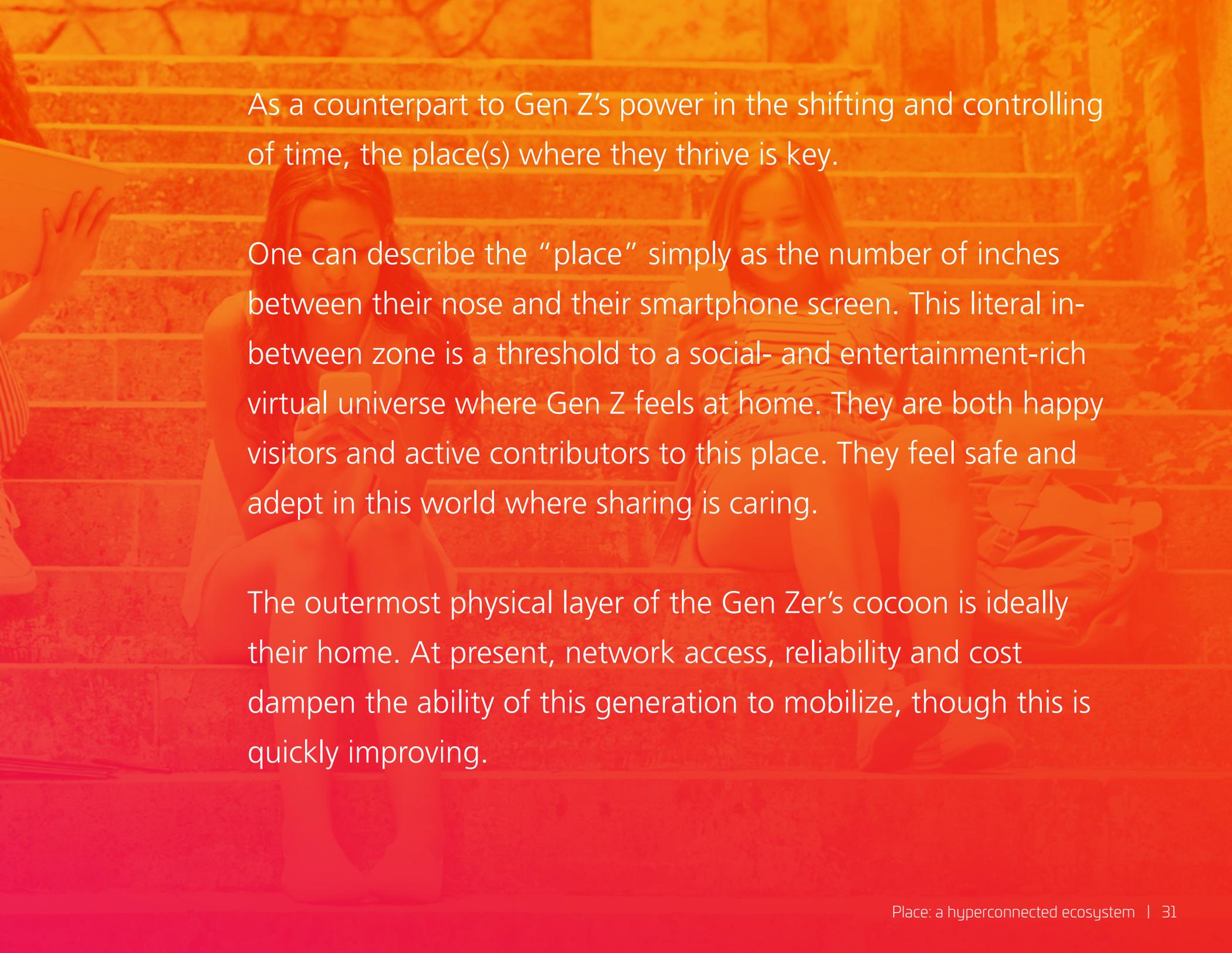
As a counterpart to Gen Z's power in the shifting and controlling of time, the place(s) where they thrive is key.

One can describe the "place" simply as the number of inches between their nose and their smartphone screen. This literal in-between zone is a threshold to a social- and entertainment-rich virtual universe where Gen Z feels at home. They are both happy visitors and active contributors to this place. They feel safe and adept in this world where sharing is caring.

The outermost physical layer of the Gen Zer's cocoon is ideally their home. At present, network access, reliability and cost dampen the ability of this generation to mobilize, though this is quickly improving.

ATTITUDE

of tech-savvy, obsessive sophisticates

Smart, opinionated and attached, Gen Z finds fulfillment in their devices.

TECH SAVVY

OBSESSIVE

BE WHAT YOU KNOW

PRO-SMARTPHONE

MORE OF EVERYTHING

Gen Z is an interesting mix of tech savvy, smart and dependent. They have many interesting ideas for the future of technology, admire the Apple brand, want to become famous YouTubers and understand that they live in a post-privacy world. Their phones make them feel secure and they form rituals and habits related to using their devices more and more. Technology is essentially an indistinguishable part of their identity and intertwined in their daily life. It gives them comfort, purpose and focus.

Tech Savvy

Gen Z considers themselves tech savvy and are proud of their sophistication.

They have many interesting ideas for future device innovations.

82%
of respondents agree that they are proud of their knowledge of technology

81%
of respondents agree that friends and family seek out their advice on new technologies

79%
of respondents agree they are proud that they are the go-to person for tech advice for friends and family

"Creating mobile devices of various sizes. You can adjust the size yourself."

"Speaking to your phone and having it translate for you."

"A chip in your arm."

"Internet-connected devices: toaster, refrigerator, phone. Really cool."

▶ Click to view our video interviews

Post-Privacy

Perhaps related to their understanding of technology, Gen Z respondents admit the age of personal privacy is over and seem to have fewer privacy concerns than one might expect. Interestingly, people associated privacy issues with the device itself versus the network that information is exchanged through.

2/3

of respondents agree that the age of personal privacy is over and that nothing you do online is private

This is also echoed in the qualitative learnings.

"I trust my phone, it hasn't let me down yet…"

"… I'm not really concerned with privacy."

"I'm a little concerned, but… not really concerned about it."

"I'm not really concerned with privacy issues. I feel my phone is secure."

Obsessive and Assuring

Many in Gen Z feel they are obsessive about their relationship with their devices and feel dependent. They are conflicted about their attachment. However they define it, it is clearly a strong and important relationship. Besides connecting them to the world, it also makes them feel safe.

RELATIONSHIP TO SMARTPHONE

🇬🇧
"Pretty dependent, maybe slightly unhealthy."

🇸🇪
"It is very easy to get addicted..."

🇺🇸
"We're pretty close friends."

🇸🇪
"We're happily married."

🇰🇷
"Very close, closer than my friends."

PHONE IS ASSOCIATED WITH SAFETY

🇸🇪
"Knowing my phone is close to me makes me feel secure."

🇺🇸
"It makes me feel safer when I'm with my phone."

🇬🇧
"Knowing your phone is in your pocket makes you feel oddly safe."

🇬🇧
"It's in my pocket and it makes me feel safe."

🇰🇷
"I definitely feel a lot safer when I have it on hand."

Be What You Know

CAREER DESIRED

Career	Percentage
A FAMOUS YOUTUBER	37%
A CUTTING-EDGE SOFTWARE DEVELOPER	35%
A TWITTER CELEBRITY WITH OVER 1 MILLION FOLLOWERS	32%
AN AWARD-WINNING JOURNALIST	26%
A FIRST RESPONDER	26%
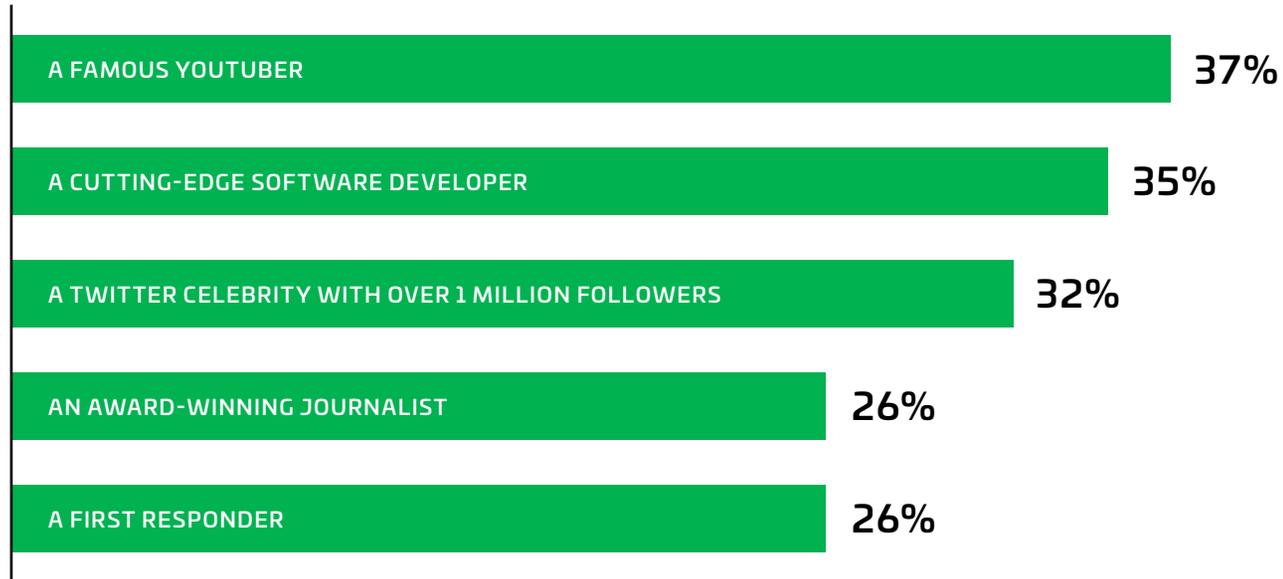
Perhaps more a reflection of society at large, Gen Z values and prioritizes what they know, admire and do. Being a famous YouTuber ranks highest, while being a first responder ranks the lowest. Technology is a direct reflection of what's important to them and can be seen in what they aspire to.

Always Within Reach

When reviewing a variety of tech and social brands, one key benefit emerges as consistent —they are within reach and becoming a ritual in the lives of Gen Zers.

BENEFITS DELIVERED BY THESE BRANDS:

- easily accessible
- convenient
- ingrained into daily life

Pro-Smartphone

**PERCENTAGE THAT "LOVE" THEIR SMARTPHONE
AND SERVICE PROVIDER**

55%
SMARTPHONE
MANUFACTURER

37%
SERVICE
PROVIDER
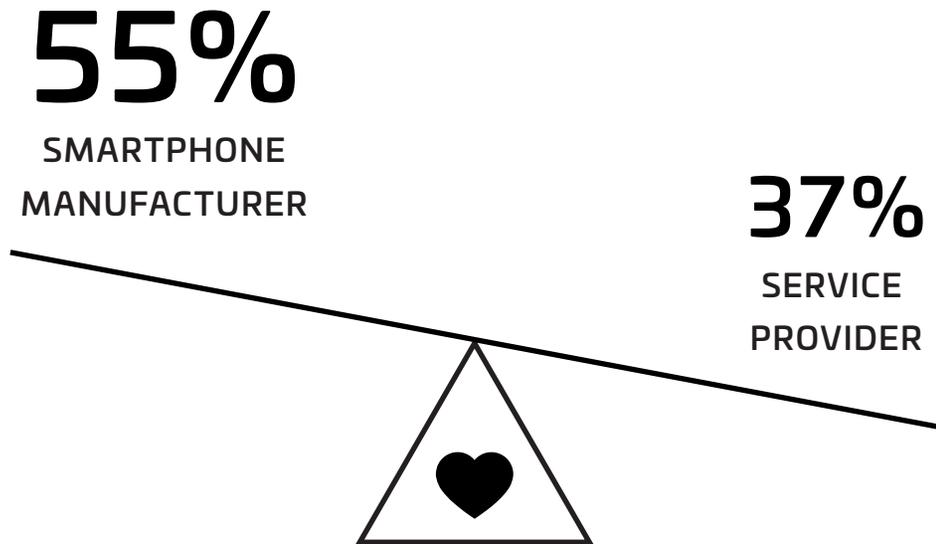
Gen Zers prefer and are far happier with their smartphone manufacturer versus their cellphone provider.

OVERALL SATISFACTION WITH CELLULAR SERVICE PROVIDER

		HIGHLY SATISFIED	LESS SATISFIED	GAP
🎵	Listening to music	73%	67%	6%
▶	Watching videos	62%	52%	**10%**
🎮	Playing games	60%	59%	1%
📷	Taking photos/videos	56%	44%	**12%**
📄	Reading	43%	34%	9%
📱	Video chatting	32%	16%	**16%**

The biggest gaps in satisfaction appear among data-heavy users, those who frequently participate in video chatting, taking photos/videos and watching videos.

Smartphones on Top

The priority of smartphones over providers was also echoed in the qualitative research. Some do feel attachment to their apps as well.

🇰🇷 "...When it comes to service, I don't really find any of the service providers appealing. I just have to use one of them. But I use the apps because I want to use them."

🇺🇸 "You don't really need the service because there is Wi-Fi everywhere now so you can use that to call and text."

🇰🇷 "Even if I have service, if I don't have the device, I can't use it."

🇬🇧 "The apps and the device. If you don't have a device that can run things properly, that's the point when things get bad."

Favorite Smartphone Brand

Among smartphones, Gen Z skews heavily toward Apple. This is particularly true for those in New York, London and Tokyo. As might be expected, Samsung is popular in Seoul, and LG also performs well in this market. OnePlus and Motorola are popular in Buenos Aires, while Lenovo and Oppo are owned by over 10 percent of Gen Z in Bangalore. Notably, Apple and Samsung are more significant brands. There is a large drop with LG, the third-ranked brand, which has 8 percent ownership among our sample.

BRAND OF SMARTPHONE OWNED

	TOTAL	NYC	LDN	BER	BLR	HK	TYO	SEL	BA
Apple	51%	71%	71%	43%	22%	58%	79%	26%	21%
Samsung	31%	23%	25%	48%	31%	37%	2%	62%	29%
LG	8%	5%	4%	6%	4%	9%	1%	21%	12%
Xiaomi	4%	1%	1%	1%	12%	13%	0%	2%	0%
Google	4%	5%	6%	3%	4%	4%	3%	3%	1%
Lenovo	4%	1%	3%	3%	12%	3%	1%	1%	2%
Vivo	4%	1%	2%	2%	7%	3%	9%	0%	0%
HTC	3%	4%	3%	6%	4%	7%	3%	0%	0%
Huawei	3%	1%	3%	9%	2%	9%	2%	2%	9%
Oppo	3%	1%	1%	1%	14%	3%	1%	0%	2%
Motorola	3%	3%	3%	3%	5%	2%	1%	0%	17%
OnePlus	3%	0%	3%	3%	2%	2%	1%	1%	31%
Nokia	3%	1%	3%	4%	6%	5%	1%	0%	3%

Favorite Smartphone Brand

Apple is preferred overall and also considered among the most innovative by Gen Z.

71%

of Gen Z in New York and London own Apple smartphones

51%

of Gen Z overall own Apple smartphones

"Apple, I'm an Apple user."

"Apple, definitely."

"Apple is among the first that comes to mind."

"Apple, we're an Apple family."

▶ Click to view our video interviews

More of Everything

We see in Gen Z an attitude of excess and wanting more of everything.
This aligns and defines the always-on mindset.

"My phone would say, I'm exhausted. Give me a break, because I use it so much."

🇰🇷 "Yesterday I did over 20 hours of Face Chat with my friends."

🇬🇧 "It makes me feel more social, more knowledgeable..."

🇬🇧 "[I like being] more connected to the world, otherwise you're out of touch with things."

More of Everything

Those who check their smartphones most frequently:

- skew to Tokyo and Seoul, and away from Bangalore

- are more likely to be 18-22 and female

- are using their phones more frequently than a year ago, and are heavier users of texting, and both text- and image-based social apps

- are less satisfied with internet access speed, regardless of location

NEW SMARTPHONE PRIORITIES

	TOTAL
Having a longer battery life	**33%**
Having more memory/storage	**27%**
Providing faster internet speeds	**23%**
Being more attractive (better shape, size)	16%
Being less expensive to buy or use	16%

The most important features Gen Z prioritizes when shopping for a new smartphone also tie to "more." They list longer battery life and more memory/storage as their top two priorities. Faster speed is the third, with all three highlighting the need for more; more time to use the phone, more storage and better internet access. Longer battery life was also echoed in the qualitative findings as a key improvement and desire. The ability to use their devices whenever (and wherever) they want is critical for Gen Zers.

ATTITUDE
of tech-savvy, obsessive sophisticates

Takeaways

Virtuosos of the medium, Gen Zers see their future careers as thriving within it. They have high affinity for the manufacturers of technology and dramatically less connection to software and platforms.

The providers or enablers of their networked life barely register. This may be best exemplified by their attitudes toward the Cloud. They see it as essential yet a benefit that they don't attribute to a source or brand. These sentiments mirror those of other generations, only more amplified.

This generation is addicted to their phones. They know it's "a problem," and yet they expect to increase usage and frequency. Expect Gen Z to face a reckoning soon.

METHODOLOGY

In Spring 2017, CommScope employed an independent research firm to conduct a global quantitative online survey among 4,003 consumers in eight distinct tech-leading cities: New York, London, Berlin, Bangalore, Hong Kong, Seoul, Tokyo and Buenos Aires. Participants were 13- to 22-year-olds and frequent users of smartphones, checking their phones at least five times an hour during waking hours. The total sample was weighted to reflect approximately a 50/50 representation of females and males within each country. Each country was further weighted to reflect their contribution to the total sample, based on population statistics of 13- to 22-year-olds in each country.

The survey covered the following topics: frequency of technology use, devices relied on for online activities, satisfaction with internet connectivity, activities conducted on their devices (frequency, enjoyment, criticality, motivations), attitudes toward privacy and technology, importance of online connectivity in their lives, personal aspirations, familiarity/usage of the Cloud, content creation and sharing, mobile device profile, importance of mobile devices in their lives, preferred brands and apps, benefit rating of smartphone brands/apps and interest in emerging technologies.

In addition to the quantitative survey, qualitative one-on-one interviews were conducted in New York, London, Stockholm and Seoul to better understand drivers, motivations and behaviors of Gen Z related to their devices.

SOURCES

Pages 4 and 5: The Landscape

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7. [The Zettabyte Era: Trends and Analysis](#); Cisco; June 2017

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CommScope pushes the boundaries of communications technology with game-changing ideas and groundbreaking discoveries that spark profound human achievement. Building on our R&D commitment, we've created The Generation Z Study of Tech Intimates to help businesses better understand the growing shifts and priorities among these influential users. The study's insights can provide a platform for you to consider how you think, plan and deliver for the evolving needs of the marketplace.

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