Media Habits of Gen Z

edison research
Generation Z (Ages 12-24)

How do they see themselves?

How do they consume media?

What do they share with peers?
Age composition of U.S. population older than 12

SOURCE: U.S. CENSUS BUREAU

ESTIMATED:
58 MILLION

12-24:
20%

25+
80%
Ethnic composition

Source: American Community Survey

**AGE 12-24**
- White: 47%
- Hispanic: 24%
- Black: 17%
- Other: 12%

**AGE 25+**
- White: 62%
- Hispanic: 16%
- Black: 13%
- Other: 9%
Who are Gen Z, according to Gen Z?
[Share five images that represent you]
Music/Art/Culture
Politics/Beliefs
Rest
Gender Identity
Feelings
Connections
Meaningful Places
Animals
Sports/Fitness
How do Gen Z consume media?
Currently Ever Watch Live Streamed Video Games
TOTAL U.S. POPULATION 12+
% SAYING YES

"Do you currently ever watch live, streamed video games on services such as Twitch, YouTube Live, Facebook Live, or Mixer?"

Age 12-24: 32%
Age 25+: 13%
Audiobook Listening
TOTAL U.S. POPULATION 12+
% EVER LISTENED TO AN AUDIOBOOK

Age 12-24: 52%
Age 25+: 43%
% WHO CURRENTLY USE STREAMING VIDEO (e.g., Netflix, Hulu, Disney)

- Age 18-24: 95%
- Age 25+: 81%

SOURCE: EDISON RESEARCH ONLINE GENERAL POPULATION SURVEY, ONLINE U.S. POPULATION 18+
Smartphone Ownership
TOTAL U.S. POPULATION 12+
% OWNING A SMARTPHONE

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age 12-24</td>
<td>93</td>
</tr>
<tr>
<td>Age 25+</td>
<td>87</td>
</tr>
</tbody>
</table>
Share of Ear
Share of Time Spent Listening to Audio by Device

<table>
<thead>
<tr>
<th>Age</th>
<th>Smartphone</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>13-24</td>
<td>57</td>
<td>43</td>
</tr>
<tr>
<td>25+</td>
<td>27</td>
<td>73</td>
</tr>
</tbody>
</table>
Frequency of Listening to Audio with Other People
BASE: U.S. POPULATION 12+ WHO GAVE A RESPONSE

<table>
<thead>
<tr>
<th>FREQUENTLY</th>
<th>SOMETIMES</th>
<th>HARDLY EVER</th>
<th>NEVER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age 12-24</td>
<td>24</td>
<td>34</td>
<td>23</td>
</tr>
<tr>
<td>Age 25+</td>
<td>18</td>
<td>27</td>
<td>30</td>
</tr>
</tbody>
</table>
Share of Ear®
Share of time spent listening to audio sources

Age 13-24
- AM/FM Radio: 43%
- Streaming Audio: 14%
- YouTube: 11%
- SiriusXM: 9%
- Others: 6%

Age 25+
- AM/FM Radio: 43%
- Streaming Audio: 14%
- YouTube: 11%
- SiriusXM: 9%
- Others: 8%

AM/FM Radio includes over the air and radio streams
YouTube for music and music videos only
Streaming Audio includes pure plays such as Pandora, Spotify, and others
Others include TV music channels, audiobooks, and other audio sources

Edison Research Share of Ear® Q1-Q4 2021
Share of Ear®

Share of time spent listening to audio sources

AM/FM RADIO INCLUDES OVER THE AIR AND RADIO STREAMS
STREAMING AUDIO INCLUDES PURE PLAYS SUCH AS PANDORA, SPOTIFY, AND OTHERS
YOUTUBE FOR MUSIC AND MUSIC VIDEOS ONLY
OTHERS INCLUDE TV MUSIC CHANNELS, AUDIOBOOKS, AND OTHER AUDIO SOURCES

EDISON RESEARCH SHARE OF EAR ® Q2 2022
Monthly Online Audio Listening

TOTAL U.S. POPULATION 12+
% LISTENED TO ONLINE AUDIO IN LAST MONTH

ONLINE AUDIO = LISTENING TO AM/FM RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET

Age 12-24: 88%
Age 25+: 70%
Share of Ear®
Music genre listened to most overall

- Hip-Hop/R&B: 25%
- Top 40/Hit Music: 16%
- Alternative Rock: 14%
- Country: 12%
- Classic Rock: 12%
- Dance/Electronic/EDM: 8%
- Christian: 6%
- Spanish/Latin: 8%
- Classical: 5%
- Soft Rock: 5%
- Oldies: 3%
- Jazz: 3%
- Other: 8%

% indicating music genre

Age 13-24
Age 25+
Listening to AM/FM Radio in the Last Week

TOTAL U.S. POPULATION 12+
% LISTENED TO AM/FM RADIO IN THE LAST WEEK
AM/FM RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE

37
Age 12-24

60
Age 25+
Online Audio Listening in Car Through a Cell Phone

TOTAL U.S. POPULATION 12+
% EVER LISTENED TO ONLINE AUDIO IN A CAR THROUGH A CELL PHONE

Age 12-24: 67
Age 25+: 44
Audio Sources Currently Ever Used in Car

BASE: HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; (A18-24: 80%; A25+:84%)

% USING AUDIO SOURCE IN CAR

- **AM/FM radio**
  - Age 18-24: 40%
  - Age 25+: 77%

- **Owned digital music**
  - Age 18-24: 49%
  - Age 25+: 79%

- **CD player**
  - Age 18-24: 31%
  - Age 25+: 36%

- **Online audio**
  - Age 18-24: 29%
  - Age 25+: 56%

- **Podcasts**
  - Age 18-24: 12%
  - Age 25+: 30%

- **SiriusXM**
  - Age 18-24: 24%
  - Age 25+: 48%
Monthly Podcast Listening
TOTAL U.S. POPULATION 12+
% LISTENED TO A PODCAST IN THE LAST MONTH

48
Age 12-24

36
Age 25+
Location Where Podcasts Are Listened to Most Often

**WEEKLY PODCAST LISTENERS**

% WHO LISTEN IN EACH LOCATION

<table>
<thead>
<tr>
<th>Ages 18-24</th>
<th>AT HOME</th>
<th>IN CAR</th>
<th>AT WORK</th>
<th>SOMEPLACE ELSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>64</td>
<td>16</td>
<td>9</td>
<td>11</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ages 25+</th>
<th>AT HOME</th>
<th>IN CAR</th>
<th>AT WORK</th>
<th>SOMEPLACE ELSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>59</td>
<td>19</td>
<td>10</td>
<td>12</td>
<td></td>
</tr>
</tbody>
</table>
# Efficiency Ranker

**Q1 2020 - Q1 2022**  
Weekly Podcast Listeners  
**Age 18-24**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Efficiency</th>
<th>Podcast</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>88%</td>
<td>Anything Goes with Emma Chamberlain</td>
</tr>
<tr>
<td>2</td>
<td>81%</td>
<td>The Tiny Meat Gang Podcast</td>
</tr>
<tr>
<td>3</td>
<td>79%</td>
<td>Zane and Heath: Unfiltered</td>
</tr>
<tr>
<td>4</td>
<td>75%</td>
<td>Impulsive with Logan Paul</td>
</tr>
<tr>
<td>5</td>
<td>72%</td>
<td>Views with David Dobrik and Jason Nash</td>
</tr>
<tr>
<td>6</td>
<td>71%</td>
<td>The Misfits Podcast</td>
</tr>
<tr>
<td>7</td>
<td>70%</td>
<td>Rotten Mango</td>
</tr>
<tr>
<td>8</td>
<td>69%</td>
<td>H3 Podcast</td>
</tr>
<tr>
<td>9</td>
<td>55%</td>
<td>Ear Biscuits</td>
</tr>
<tr>
<td>10</td>
<td>54%</td>
<td>Call Her Daddy</td>
</tr>
</tbody>
</table>

*Efficiency: % of show’s audience that fits the selected demographic criteria*
How Do You Discover Podcasts Most Often?

U.S. WEEKLY PODCAST LISTENERS
% SAYING METHOD

- SEARCHING YOUTUBE: 21% (Ages 18-24), 11% (Ages 25+)
- SOCIAL MEDIA POSTS: 18% (Ages 18-24), 11% (Ages 25+)
- SEARCHING THE INTERNET: 17% (Ages 18-24), 17% (Ages 25+)
- RECOMMENDATIONS FROM FRIENDS AND FAMILY: 23% (Ages 18-24), 16% (Ages 25+)
- RECOMMENDATIONS FROM OTHER AUDIO PROGRAM HOSTS: 12% (Ages 18-24), 7% (Ages 25+)

edison research
podcast metrics
Social Media Usage
TOTAL U.S. POPULATION 12+
% USING ANY SOCIAL MEDIA

Age 12-24: 93%
Age 25+: 80%
Social Media Brand Usage

TOTAL U.S. POPULATION 12+
% USING SOCIAL MEDIA BRAND

- Instagram: 39% (Age 12-24), 75% (Age 25+)
- TikTok: 28% (Age 12-24), 69% (Age 25+)
- Snapchat: 19% (Age 12-24), 59% (Age 25+)
- Facebook: 43% (Age 12-24), 68% (Age 25+)
- Twitter: 24% (Age 12-24), 42% (Age 25+)
- Pinterest: 26% (Age 12-24), 35% (Age 25+)
- LinkedIn: 14% (Age 12-24), 22% (Age 25+)
Social Media Brand Used Most Often
BASE: U.S. 12+ SOCIAL MEDIA USERS

Age 12-24
- Facebook: 21
- Instagram: 25
- TikTok: 22
- Snapchat: 19
- Twitter: 4
- Pinterest: 4
- Other: 5

Age 25+
- Facebook: 64
- Instagram: 11
- TikTok: 6
- Snapchat: 3
- Twitter: 6
- Pinterest: 4
- Other: 6
[Share five examples of things your would share with your friends]
Personal photos or experiences
Memes to express emotions
Video Game References
Sports
Social media trends / Account Recommendations
Politics/Beliefs
Humor
CRINGE

-80
-60
-40
-20
-10
0
10
20
30
40
50
60
70
80
90
100

COOL

Stranger Things
Tattoos
Meditation
Radio
Roller Skating
Your Parents
80s Music
YouTube
Marvel
Memes
Star Wars
Starbucks
Podcasts
Thrift Shops
Millenials
Dungeons and Dragons
Designer Clothing
Veganism/Vegetarianism
Legal Marijuana
Virtual School/Hybrid Work from home
Snapchat
TikTok
Influencers
Selfies

-10
-20
-30
-40
-50
-60

Bitcoin
Karaoke
Facebook
Elon Musk
NFTs

TikTok Dances
Brands posting on social media like they are real people
Generation Z

How do they see themselves?

How do they consume media?

What do they share with others?
Generation Z

They are diverse and open minded

They consume media digitally
(Unless influenced by older generations or environment)

They have a lot on their minds
What can Public Radio do for Gen Z?

Provide context around the important issues and events in their lives – even if that means finding them outside of the public radio sphere.

Find the right “meme” that expresses the feeling.

Be one of the places they can go to relax.

Consider music as a gateway.

Be one of the things they can share with friends and family.

Try not to be cringe – be authentic.