



GEN Z & ENTERTAINMENT

Understanding Generation Z
through books, festivals, gaming,
music and series.

**vivendi Brand
Marketing**



'GEN Z YELLOW'

Described by colour specialists' Pantone as a 'confident and outgoing yellow shade', Gen Z yellow arguably reflects what Gen Z are looking for – hope for the future & energy to engage.

In 2019 Generation Z overtook the Millennials to become the largest generation on Earth, representing 32% of the global population.

Born after 2000, they are the first-ever generation of digital natives. This is fundamentally shaping how they consume content, media and entertainment, with mobile and social media integral to their lives. From streaming to services, video games to short movies, they connect with our businesses in a new and different way, pioneering major trends in the entertainment industry.

As a global leader, we at Vivendi have already started to build an engaging and meaningful relationship with these connected and experience-craving consumers. With our best-in-class brands, we are in the unrivalled position to provide this generation of festival-goers, gamers, listeners, readers, and viewers with soul-soaring entertainment.

AND WE WANT TO GO FURTHER.

With this strategic report on Gen Z and Entertainment, the most comprehensive to date, our aim is to anticipate their needs and adapt our model accordingly.

The following pages will not only explore how this young, vibrant and complex generation is redefining the name of the game, but also how to engage with them. Because for Vivendi, like for many other businesses, this interaction is critical for today's - and tomorrow's - success.



YANNICK BOLLORÉ
Chairman of the Supervisory
Board of Vivendi



ARNAUD DE PUYFONTAINE
Chief Executive Officer
of Vivendi

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GEN Z

**is the world's
first-ever generation
born into the
digital age**

Their first baby steps were recorded through a Facebook lens. Their first mouthfuls of mush eaten to tunes on their parents' phones. They were lulled to sleep by stories on smart speakers. They were born within digital.

That they are digital natives is absolutely fundamental to the way modern youth engages with – and experiences – their world. For Gen Z, the virtual and In Real Life (IRL) co-exist seamlessly, fluidly, without borders.

Crucially, two key platforms – streaming and social media – are vital to the daily lives of this generation. They enable Gen Z to switch effortlessly and without friction between their virtual and real lives. Dominant, digital enablers, streaming and social platforms massively shape how modern youth experiences – and interacts with – the world.

And what rocks their experiences and interactions?

Entertainment! From music to gaming, series to festivals, entertainment is the number one passion for Generation Z!



11 TRAITS

8 SECONDS

ACTIVISTS

ANXIOUS

AUTHENTIC

CO-CREATORS

CONNECTED

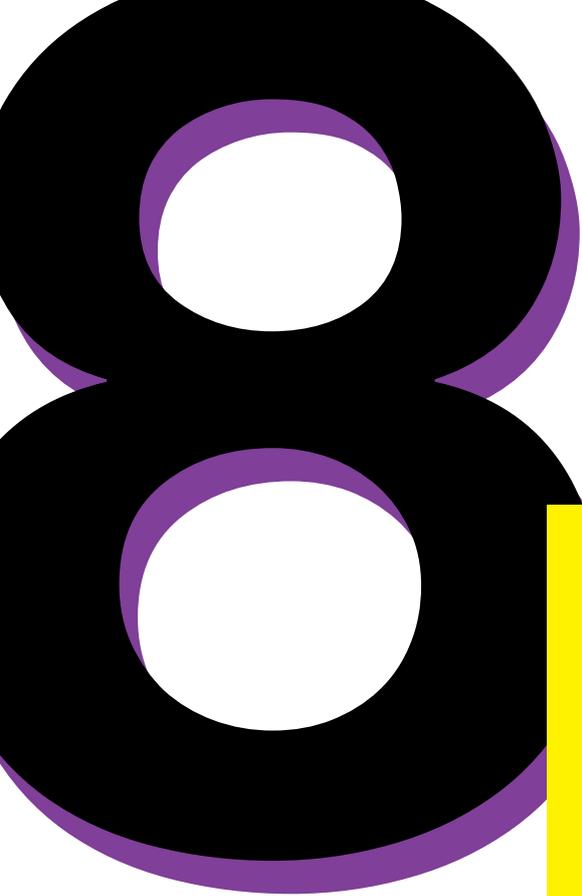
**CONSCIOUS
CONSUMERS**

**CRAVERS OF
EXPERIENCE**

**FINANCIALLY-
SAVVY**

INCLUSIVE

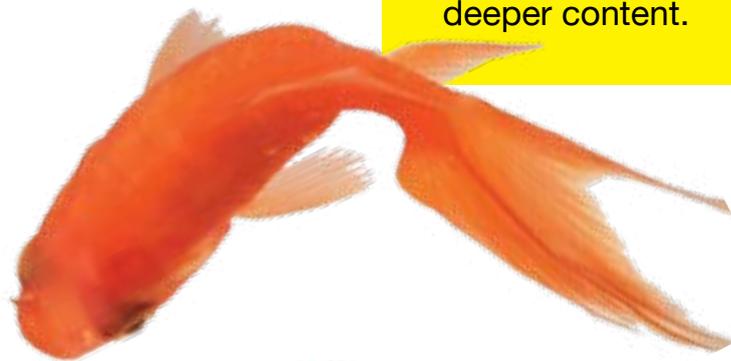
**SELF-
STARTERS**



SECONDS

This generation has an **8-second attention span**, less than a **goldfish**. But despite the blink-and-you-miss-it timeframe, Gen Z are aces at absorbing content quickly. They can speed read for success.

This whip-sharp understanding of content means they decide quickly whether to click through – or not – to engage with deeper content.



YOUTUBE ON STEROIDS!



Launched in 2018, by November 2019 music-driven video app TikTok had been downloaded over 1.5 billion times. A massive hit with global Gen Z, TikTok is a video-sharing platform where users post fun, quirky, ‘meme-able’, 15-second video clips.

With music at the heart of this app, TikTok’s authentic, unfiltered, user-generated content is widely popular with modern youth.

INSTAGRAM STORIES



Rolled out in 2016, Instagram Stories cater to Gen Z’s appetite for short storytelling content, with a bite-sized video/photo sharing format similar to Snapchat. Users upload fifteen second photos/videos which are available to followers for a 24-hour period. Daily active users of Instagram Stories sit at 500 million ⁽¹⁾.

(1) Statista, 2019

ACTIVISTS

Second nature for Z to tap into the endless reach of social media to activate followers for a **social/political/cultural cause**.

They understand effortlessly how to leverage social media to take activism from online to offline.



GRETA THUNBERG
CLIMATE CHANGE ACTIVIST

17-year-old Greta Thunberg from Sweden, and Time's 2019 person of the year, embodies activism for this generation. In 2018 Greta began a youth-led movement, 'School strike for climate'.

Fast forward to 2020 Greta has addressed heads of state and CEOs, met the Pope, sparred with President Trump and inspired four million people to join the global climate strike in 2019, considered one of the largest climate demonstrations in history.



AMIKA GEORGE
ENDING PERIOD POVERTY

In 2017, British Gen Z activist Amika George launched the Free Periods Campaign to end 'period poverty'. Period poverty is when girls stop going to school during their period because they can't afford sanitary products.

Amika campaigned to ensure all schools would provide free menstrual products. In 2019 the UK government agreed to provide free menstrual products in English schools from 2020.

ANXIOUS

Connectivity runs through the lives of Gen Z like blood through their veins. They are **bombarded by content** – from economics and climate change to politics and disease, this unfiltered view of the world fuels heightened levels of anxiety.

Adding to this, pressure to present carefully curated images of themselves to the digital world is leaving a mental mark. Mindful of the negative impact on their soul, modern youth is embracing **'digital detox'** sessions, creating solutions to beat the digital blues.

“ WE HAVE UNIQUE INSIGHT AND CREDIBILITY. THIS ALLOWS US TO CULTIVATE TRUST AND BUILD PRODUCTS THAT OUR COMMUNITIES GENUINELY USE AND NEED. ”

Georgia Messinger,
Trill co-founder & COO

DIGITAL DETOX APP



Flipd helps this cohort celebrate *'all of life's mindful moments'*. Encouraged to disconnect from their always-on lives, the app allows users to track their productivity (how long they unplug for), lock-away apps that distract, unplug with friends and access wellness' resources to stay on track.

Founded by three schoolgirls, Trill is a free, online community for Gen Z to freely express themselves. *'As Gen-zers we have grown up with social media in our pocket,'* says Georgia Messinger, Trill co-founder & COO.

AUTHEN- TIC

Watchful of artifice and with a youthful wisdom garnered through massive exposure to the world around them, Gen Z crave authenticity.

They **embrace individuality and being truly genuine.**

Authenticity means sharing an unfiltered, candid lifestyle with others, rather than an overly-edited, fake version. Millennials created the *'selfie culture'*, Gen Z are all about the *'finstas'*, private *'Insta'* accounts with close friends which show the real person.

Z support influencers who are authentic: 42% sometimes feel closer to YouTubers than to their actual group of friends (Prosumer 2019, BETC). YouTuber and 'It girl' Emma Chamberlain, for example, shares her everyday life with over 8 million followers through vlogs (video blogs). *"I want to spread the message of 'Hey, girls... They can have their acne out. They can do whatever they want,'" says 18-year-old Chamberlain.* ⁽¹⁾

Authenticity seeps into brand preferences. 61% of Gen Z (14-21) prefer when brands feature real people in their ads versus 39% who prefer when brands feature celebrities in their ads. ⁽²⁾

(1) Marie Claire, 2019
(2) Cassandra, 2019



CO-CREATORS

Glossier.

Billion-dollar beauty business Glossier, crafted with consumers, stays relevant with Gen Z through authentic advertising, customer experience and ‘thrives on a symbiotic relationship’ with the consumer.

Co-creation is a **collaborative, personalised process** between Gen Z and a brand that gives this cohort a voice in product development.

From building a product to the pulse of a marketing campaign, co-creation ensures authentic content that resonates with this cohort.



CONNECTED

This generation connects across cultures, nurturing a **borderless society of global citizens**. Sharing videos/photos/music creates a sense of togetherness and community.

97% of Z own smartphones and 60% ⁽¹⁾ say they are constantly connected, spending more than four hours a day online.

Second, third and even fourth-screening is common place. The top 'second-screen' action while watching TV? 72% use social media, 71% message friends, and 52% play games.

“ MY FAVORITE SOCIAL MEDIA APP IS SNAPCHAT BECAUSE I LOVE BEING ABLE TO SEE WHAT MY FRIENDS ARE UP TO AND BE ABLE TO SHOW MY FRIENDS WHAT I'M DOING THROUGH FUN PICTURES OR VIDEOS. ”

Grace, 14,
Washington D.C, USA

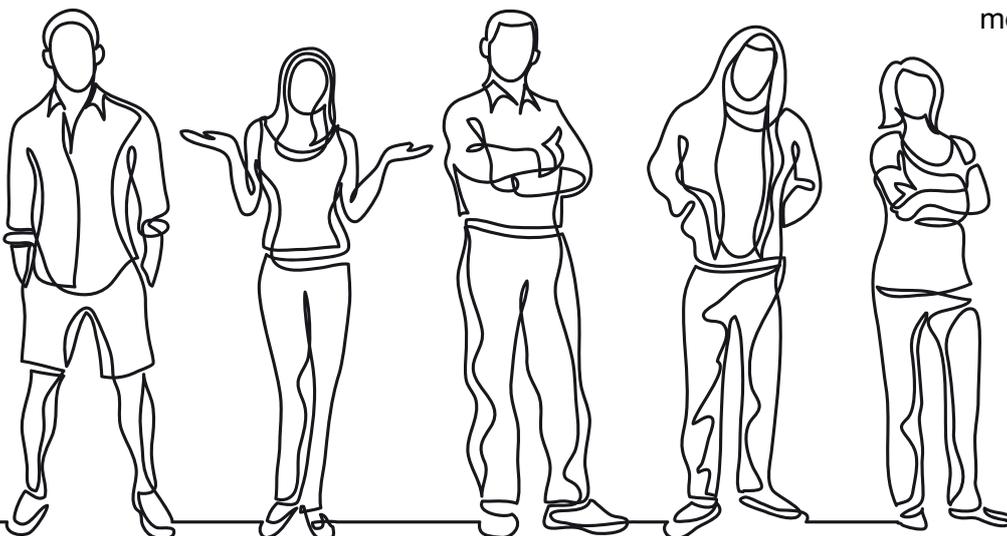
'ANTI-BRO' SQUAD APP



Screen-sharing app Squad, favoured by teen girls, advertises itself as the '*closest thing to hanging out together IRL*'. The app allows users to video chat and share their phone screen with a friend in real time. Groups of friends can screenshare on any platform, from editing photos to watching videos.

Squad appeals to Gen Z girls in particular, providing a safe space for girls to digitally hang out with friends. With no marketing and in a few months, the app had over 450,000 users—70% of those are teen girls – and users had spent over one million hours on Squad calls. ⁽²⁾

(1) Global Web Index, 2019
(2) TechCrunch



CONSCIOUS CONSUMERS

With their smartphone a window onto the world, this generation travels effortlessly across continents, educating themselves ceaselessly about **global environmental issues.**

Such freedom to explore and learn continues to shape the relationship this generation has with consumerism. Today, and tomorrow, their purchasing patterns will favour **brands aligned with their values.**



depop

As conscious consumers, Zs look to mobile-first, resale clothing platforms as a sustainable solution to shopping. Active in 147 countries, Depop provides this cohort with a digital resale platform, with over 140 000 second-hand products listed daily on the app.

Zs buy vintage items, give a second life to products seen as cool and 'instagrammable'. The e-commerce platform helps them to be self-starters, accessing a global marketplace to sell their clothing items on the app.

Depop claims to have over 15m users, of which 80% are under 26.

“ IT'S A FASHION MARKETPLACE FOR GENERATION Z. ”

Maria Raga, CEO, Depop. ⁽¹⁾

(1) The Guardian, 2019

CRA-VERS OF EXPERIENCE



Saturated by their virtual worlds and mindful of **digital overload**, **Generation Z craves IRL (In Real Life)**, personalised experiences. They desire immersive moments that capture their full attention and alleviate their stress. Although digital natives through and through, 'phygital' (physical / digital) experiences hold a big appeal.

CHINA VIRTUAL REALITY (VR) VORTEX

Launched in 2018, US\$1.5 billion Oriental science fiction valley claims to be China's first virtual reality (VR) theme park. Walking the line between digital and physical, the park immerses modern youth in VR roller coasters, futuristic space battles and experiential tours.

As conscious consumers, Gen Z are fully aware of their environmental footprint; they're willing to spend less on material goods and more on experiences. Brands that understand Z's latent desire for IRL and the delicate balance that exists between their cyber and concrete lives will nurture real connections with this cohort.



FINANCIALLY

SAV



VWY

With the **ability to rapidly ramp-up their knowledge on any subject** thanks to easy access to the Internet, and in addition to personal experiences, Gen Z have lived close up to economic recession. As a result, they have a practical approach towards **money and spending.**

Financial security and savings are priorities for this cohort. Indeed, 56% have some sort of cash savings. ⁽¹⁾ While 27% state that saving money and better managing their cash flow is most important for them to be happy and satisfied with their quality of life. ⁽²⁾

(1) Global Web Index x Snapchat report 2019
(2) Meaningful Brands® 2019 study

KARD
MOBILE BANK
TARGETS GEN Z



Launched in 2019, French mobile banking start-up Kard places modern youth at the core of its mission. Even employing Gen Z in product and customer support. The account includes features that allow parents to link their accounts and a savings section.



INCLUSIVE

“ AT PHLUID,
OUR MAIN DEMOGRAPHIC
IS GENERATION Z. ”

Christina Zervanos,
head of PR, Phluid. ⁽¹⁾

Inclusive, tolerant and abhorring discrimination Gen Z demands a society that embraces diversity and the freedom of individuals to choose to express their gender and sexuality as they wish. They are open to the multi-faceted ways of living a life.

THE PHLUID PROJECT WORLD'S FIRST GENDER-FREE SHOP

Young shoppers expect the places they shop to be inclusive. Founded in 2018 in New York, The Phluid Project is the world's first gender-free store, selling clothes not defined by gender. Focused on gender-fluidity, the store is a safe space for customers to relax, shop, eat and drink, and attend events.

AARON PHILIP GENDER NON-CONFORMING AND DISABLED TEEN MODEL

A trailblazing Z, 18-year-old Aaron Phillip is the first transgender, black and disabled model signed to a major modelling agency, Elite. Phillip officially made her runway debut in 2019 at Willie Norris' fashion show in New York.

Phillip also recently featured in the Sephora 2019 We Belong to Something Beautiful campaign, which highlights the transgender & non-binary community.

(1) Ypulse



SELF-STARTERS



Expanding their knowledge beyond the physical classroom, it is second nature for Gen Z to **compliment what they learn at school** with digital dives. YouTube is an endless library of learning and the preferred space for Gen Z to educate themselves. The ability to jump online to gain knowledge is also nurturing a new breed of Z 'teenpreneurs': nearly one in three (29%) Gen Z are interested in entrepreneurship. ⁽¹⁾

“ IT'S NOT ALL ABOUT STAYING UP TO DATE WITH THE BEAUTY TRENDS. WE'RE USING OUR PLATFORMS MORE POSITIVELY TO INSPIRE AND MOTIVATE THEM IN SOMETHING THAT'S NOT PREDOMINANTLY JUST BASED ON HOW THEY LOOK. ”

STUDY TUBERS

A new breed of online stars have emerged: study tubers. Relatable, authentic individuals, these vloggers shoot videos of themselves revising and share their study habits and top tips on how to balance studies with hectic lives.

Jade Bowler, 19-year-old UK study tuber. Her vlog, 'My 5am morning school routine', hit 1.5m views.

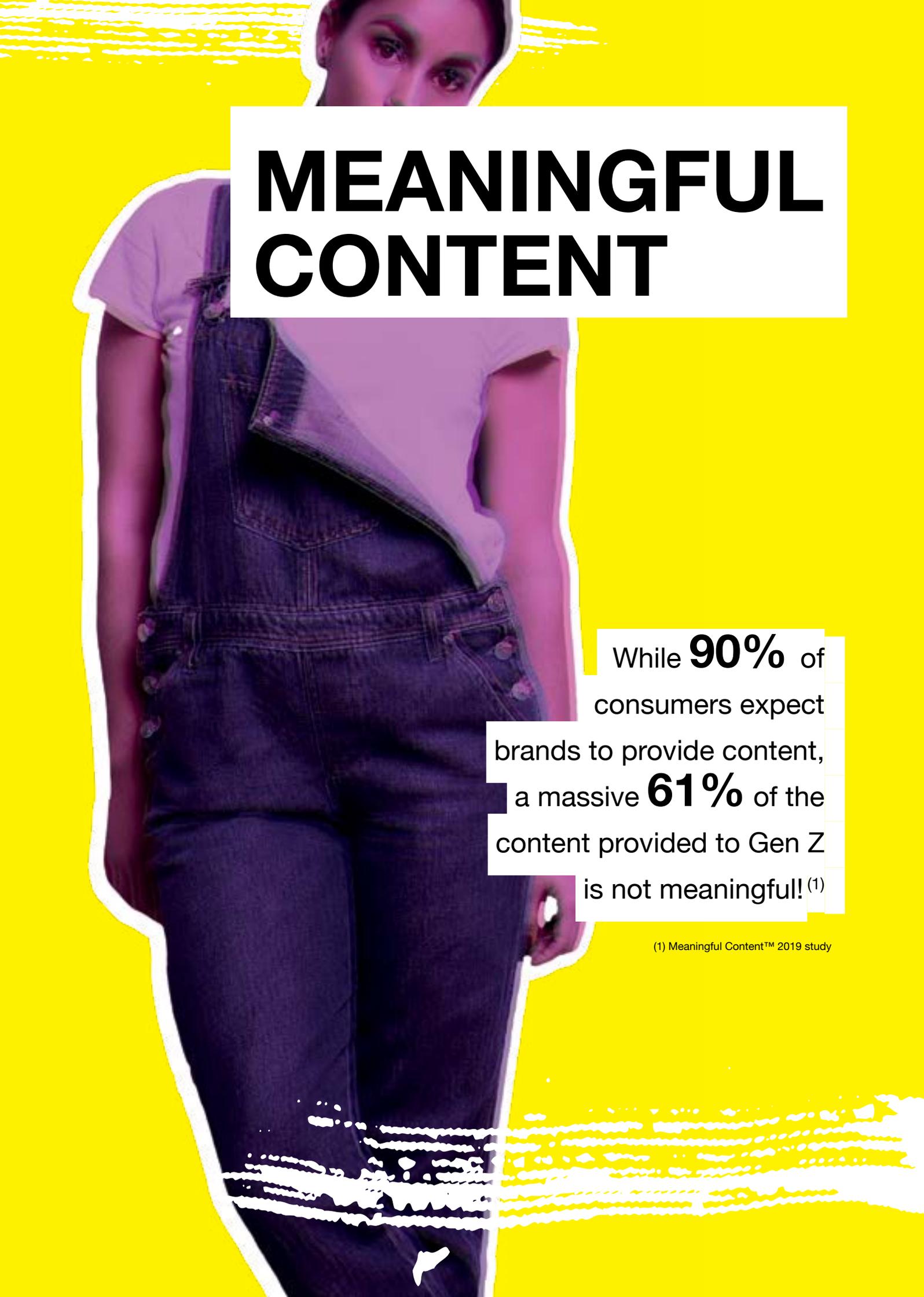
JENK OZ, BRITAIN'S YOUNGEST CEO

Jenk Oz is not your average kid - at just 12-years-old Oz became CEO when in 2016 he launched iCoolKid.com, a website for 8 to 15-year-olds. Today, the site (Thred Media), has 5,000 visitors a day and over 140,000 followers on social media.

iCoolKid describes itself as the *'digital home for a new generation of young people. One that is super passionate, boundlessly creative and endlessly curious about so many weird and wonderful topics.'*



(1) Global Web Index/Snapchat 2019 report



MEANINGFUL CONTENT

While **90%** of consumers expect brands to provide content, a massive **61%** of the content provided to Gen Z is not meaningful! ⁽¹⁾

(1) Meaningful Content™ 2019 study

CONTENT THAT CONNECTS TO Z

What type of content is meaningful for global youth along the consumer decision journey ?

Collaborations with celebrities are especially expected by this younger cohort: they play a strong role all along the consumer decision journey, while short movies / clips also rate higher amongst this generation and are among the top ‘premium price’ drivers.

Content has its strongest impact on advocacy but is useful at each step of the consumers’ decision-making process: consumers posts on social media, information on products, charity /

fundraising actions, consumers’ testimonials and co-creation initiatives must be provided by brands to perform all along the Gen Z consumer decision journey.

Content expectations from gaming

Given Gen Z’s concerns for environment, brands should be involved in causes to be meaningful to them – these younger consumers also expect brands to provide content on lifestyle/trends and well-being.

And what makes this generation different from others is their heightened expectations for content related to gaming, and fashion to a lesser degree.

CONTENT IN THE CONSUMER JOURNEY

FAMILIARITY

- Consumer posts on social media
- Product info
- Charity
- Consumers’ Testimonial
- Collaboration with celebrities
- Co-creation
- ...

PURCHASE

- Consumer posts on social media
- Co-creation
- Consumers’ Testimonial
- Product customization
- Collaboration with celebrities
- Product Info
- ...

ADVOCACY

- Consumer posts on social media
- Collaboration with celebrities
- Charity
- Product Info
- Brand Contest
- Product customization
- ...

PREMIUM PRICE

- TV show
- Music video
- Short movie/ video
- Web series
- Collaboration with celebrities
- Game on mobile devices
- ...



GEN Z & BRANDS

At 2.47 billion – and overtaking the Millennials in 2019 - Gen Z ⁽¹⁾ now represent the **largest generation on Earth.**

Understanding this nuanced generation, and going far beyond the easy stereotypes of internet and smartphone-addicted youth, will be critical for brands to attract spending from both earning, and dependent, Gen Zers.

(1) For our report, born between 2000-2012

HELPING Z ON MONEY MATTERS

In 2018, Chase, an investment bank and financial services company, partnered with the Media 'NowThis' to launch 'NowThis Money' – an economic literacy channel on social media – to reach younger consumers and to become known as a source of supportive and instructive financial news and guidance.

NowThis Money became the NowThis's fastest growing channel ever with:

**- over 7 000 hours of
NowThis Money content
consumed**

**- a 9% lift in
consideration intent for
Chase products**

PUMA X GEN Z WOMEN

Cake, the experiential agency for sports brand Puma, recently worked with Puma to launch their Cali Sport sneakers, chalking up a social reach of 15 million. Puma wanted to target Gen Z women – an audience with a hustle mindset, always aspiring for more.

For the launch, Cake crafted each touchpoint to be 'grammable' and easily shared by Gen Z influencers. Bumper cars, shoe 'selfie' boxes, giant 3D letters, a sneaker Ferris wheel and Virtual Superland, a personalised VR rollercoaster experience, all created photo opportunities.



GEN Z & BOOKS

“ I HATE E-READERS. PHYSICAL BOOKS ARE JUST SO MUCH BETTER. YOU CAN DISCONNECT FROM YOUR REALITY AND DIVE INTO NEW WORLDS. ”

Malia, 18, Malmö, Sweden

“ I LOVE READING! I READ JUST ABOUT EVERY NIGHT BECAUSE IT HELPS ME FALL ASLEEP ”

Morgan, 12, Washington D.C., USA



DATA BUZZ

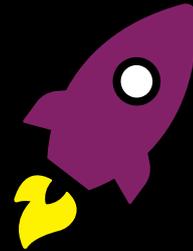


1 in 4
GEN Z THINK
PHYSICAL BOOKS
ARE COOL ⁽¹⁾



ONLY
9%
OWN AN
E-READER ⁽²⁾

GLOBAL BOOK PUBLISHING
REVENUES DUE TO HIT
€129 BILLION
BY 2023 (US\$122 BILLION IN 2018) ⁽³⁾



GLOBAL REVENUES FOR E-PUBLISHING REACHED **US\$23.9 BILLION**
ON A COMPOUND ANNUAL GROWTH RATE (CAGR) OF **5.3%** FROM 2019 TO 2024. ⁽⁴⁾

BETWEEN 2020 AND 2024 **5.1% CAGR** FOR E-PUBLISHING VERSUS **1.1%**
FOR BOOK PUBLISHING. ⁽⁵⁾

BY 2022, **1.8 BILLION** E-PUBLISHING USERS, RISING FROM 1.4 BILLION IN 2019. ⁽⁶⁾

INTRO

AREN'T DEAD!

BOOKS AREN'T DEAD!

Traditional books are still **popular among young readers** as they seek **escapism** from our technology-driven world.

Walking the virtual and real worlds, modern youth savours online research, reviewing books and authors thanks to **recommendations** from their favourite booktubers or bookstagrammers.



TRENDS

Booktubers

Bookstagrammers

Audiobooks

Themes explored in Young Adult fiction

BOOKTUBERS



“ READING IS USUALLY A PRETTY SOLITARY, QUIET EVENT SO GETTING TO FIND A PLACE WHERE PEOPLE ARE PASSIONATE AND EXCITED AND WANTING TO TALK ABOUT WHAT THEY’VE READ IS WHAT’S REALLY MAGICAL ABOUT BOOKTUBING. ”

Ariel Bissett, booktuber & creator of ‘reading rush’

BOOKTUBER CHRISTINE RICCIO

With over 409 000 subscribers, Christine Riccio (a.k.a. PolandBananasBooks) has amassed a massive youth following with her booktube channel.

Riccio is one of three Youtubers behind BOOKSPLOSION, which claims to be Youtube’s longest running book club. (4)

Booktubers are YouTube vloggers who review and discuss books on their channel. From 2017 to 2018 views of booktuber videos rose by a massive

40%. (1)

Gen Z actively engages with the ‘booktube’ community - a global, online YouTube group of book lovers who inspire viewers to turn into avid readers. These ‘bookfluencers’ blur the line between physical and digital: the consumer love affair with books comes full circle. These booktubers also tap into Zs desire for video and ‘edutainment’. (2)

Unlikely to read literature reviews in a newspaper, Gen Z turns to these influencers for word-of-mouth book recommendations and to feel part of a global book club community.

Publishers collaborate with booktubers to reach and connect with the Gen Zers who are eager to dive deeper into the universe of books and learn about new titles and authors from their favourite influencers.

Booktubers host different events to engage their viewers. The ‘reading rush’ (previously known as the booktube-a-thon)(3) is a reading marathon where global viewers are encouraged to read as much as they can in a week-long period. During the week, booktubers host varied events on social platforms, jam-packed with interactive reading challenges and giveaways to keep viewers motivated.

(1) Think With Google
(2) HuffPost
(3) Youtube
(4) LinkedIn

VIDEOS

BOOKSTAGRAM

BOOKSTAGRAMMERS

Bookstagrammers

are Instagram accounts dedicated to books. Gen Z taps into posts from bookstagrammers to discover new reads and book reviews.

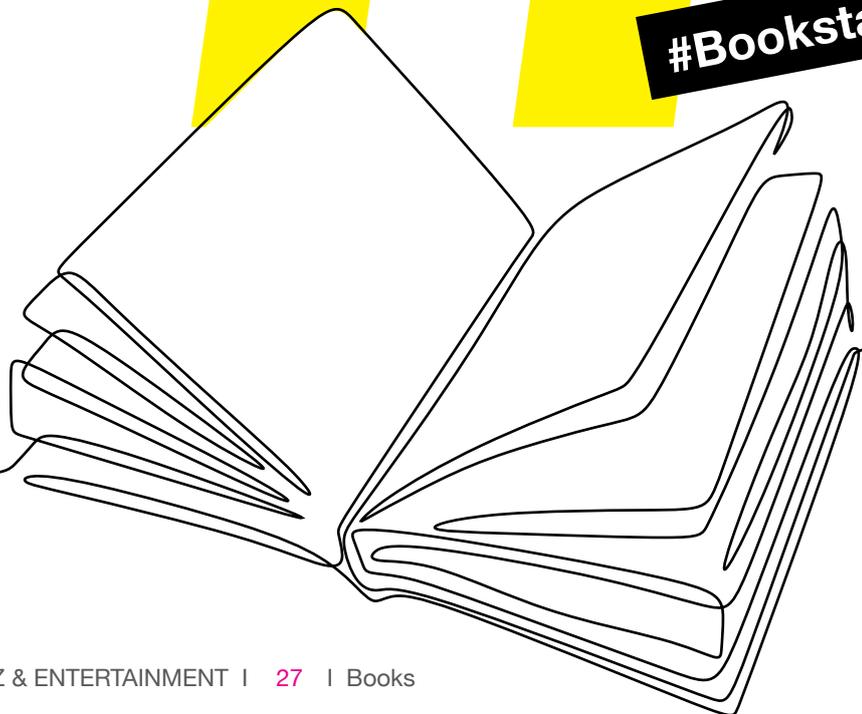
The 'literary instagram' community shares aesthetically-pleasing photos of books, often accompanied by a short description or review of the book. While publishers and authors send bookstagrammers free books to raise awareness of the book through posts by the bookstagrammer on his/her feed.

#Bookblogger

#Bookstagrammer

#Bookworm

#Bookstagram



AUDIOBOOKS



For **56%** ⁽¹⁾ of this hyper-connected, multi-screening, generation, audio is an escape from excessive visual stimulation. And with digital technology central to their lives, audiobooks hold a natural appeal to Gen Z. Editis' successful audiobook platform Lizzie, for example, has over 180 titles for young adults, nearly 50% more than in 2018.

Audiobooks also give this cohort the flexibility to consume a book while simultaneously carrying out another task.

LIZZIE 



(1) Spotify

YOUNG ADULT FICTION: THEMES

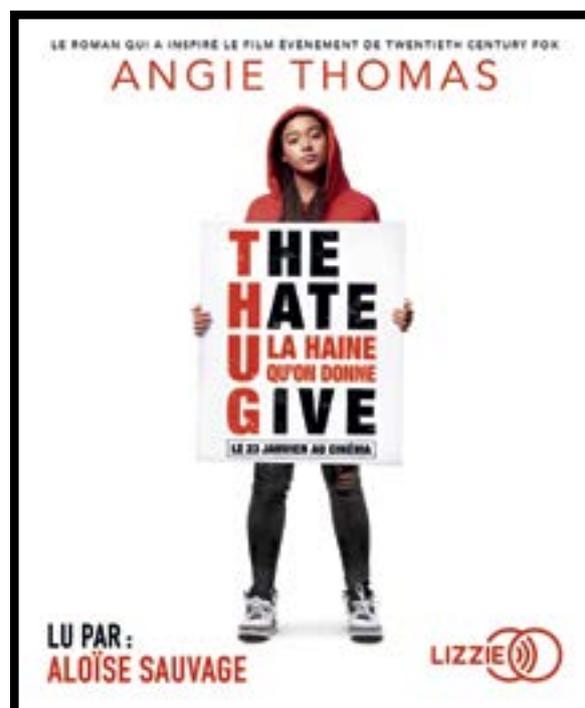


Traditional books are still popular among young readers as they seek escapism from our technology-driven world. Narrative in style, and set in imaginary or realistic universes, young adult fiction touches on circumstances and issues related to the start of adulthood.

HARD-HITTING THEMES

Themes explored in recent successful and youth-targeted books include racism in **Angie Thomas' The Hate U Give**, homosexuality in **Heartstopper** by Alice Oseman and suicide in Jay Asher's **13 Reasons Why**. **The Burning** by Laura Bates explores the topics of double-standards, slut-shaming, misogyny and online cyberbullying that a young 15-year-old girl faces. ⁽¹⁾

Further authors popular among global young include: **Cathy Cassidy, Florence Hinckel, Victor Dixen and Cao Wenxuan.**



(1) The Guardian

GEN Z & GAMING



“ I LIKE TO PLAY VIDEO GAMES
BECAUSE I CAN DO THINGS I CANNOT
DO - OR THAT I WOULDN'T DO - IN
REAL LIFE. ”

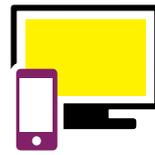
Luca, 12, Paris, France

DATA BUZZ



4 in 10

GLOBAL YOUTH
CAN'T GO A DAY
WITHOUT GAMING ⁽¹⁾

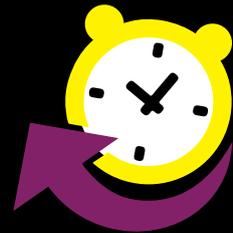


52%

CHOOSE TO PLAY
GAMES AS A 'SECOND-
SCREENING' ACTIVITY
WHILE THEY WATCH TV ⁽²⁾

5 BILLION

HOURS - TOTAL VIEWING TIME FOR
TOP TEN GAMES ON TWITCH ⁽³⁾



GLOBAL GAMES MARKET ESTIMATED AT **US\$152.1 BILLION** IN 2019 ⁽⁴⁾

US\$68.5 BILLION MOBILE GAMING REVENUES IN 2019,
LARGEST SEGMENT OF THE GLOBAL GAMES MARKET ⁽⁵⁾

62% OF GLOBAL YOUTH HAVE USED GAMING APPS ⁽⁶⁾

250 MILLION FORTNITE PLAYERS IN 2019 ⁽⁷⁾

1 BILLION HOURS TOTAL VIEWING TIME FOR LEAGUE OF LEGENDS ON TWITCH (2019) ⁽⁸⁾

54% OF GEN Z ARE INTERESTED IN GAMING, COMPARED TO
45% OF MILLENNIALS (ROUGHLY BORN 1980-1999) ⁽⁹⁾

FORTNITE GAMER NINJA HAS OVER **22 MILLION SUBSCRIBERS** ON YOUTUBE ⁽¹⁰⁾

INTRO

STEREOTYPE

GEN Z REINVENTS THE GAMER STEREOTYPE



Gaming has emerged from the shadows. Once loved by just a few, today gaming is a mainstream cultural activity for global youth.

No longer seen as an anti-social past-time for geeks, gaming is about consolidating existing friendships, building new ones and connecting over the same passion. It's also about nurturing strategic thinking and teamwork.

Games help global youth take flight from the real world, offering relief from the stress they feel in their day-to-day lives. Games provide experiences rendered impossible In Real Life (IRL).

Gaming is also about communities. Overwhelmed by the infinite nature of the digital world, this young generation huddles around their favourite games in virtual hang-outs.

Generation Z also enjoy the 'phygital' aspect of gaming. While they love to play online, they support their passion offline through esports tournaments and gaming conventions.

DREAMING ABOUT STREAMING...

Just like for music, series and film content, streaming technology has revolutionised access to gaming content for modern youth. Game streaming is an alternative to buying



the physical game or downloading the game. The cost of a streaming service is likely to be cheaper than buying new games outright. Thanks to streaming, spectator gaming is also really picking up momentum. Live game-streaming platforms, like Amazon's Twitch and Microsoft's Mixer, allow users to watch games and connect with gamers in real time.

...AND SMARTPHONES

As well as the streaming generation, Gen Z are the smartphone generation. For gaming this means they like to go mobile and they're helping to fuel growth in mobile gaming. Within the estimated US\$152.1 billion global games market, in 2019 mobile gaming generated US\$68.5 billion in revenues, making it the largest segment of the global games market.

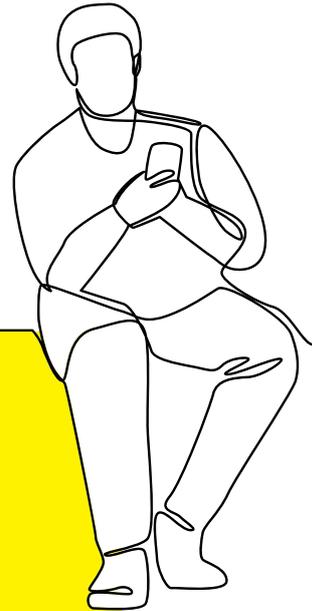
“GENERATION Z IS OUR FUTURE, AND THAT GOES FOR GAMING AS WELL. WHAT THEY WANT IN GAMES IS SHAPING THE TRENDS OF TOMORROW, AND AS A COMPANY THAT HAS ALWAYS STRIVED TO EXPAND THE BOUNDARIES OF GAMING, WE ARE REALLY LISTENING TO YOUNG PLAYERS.”

Damien Marchi,
Vice-President Marketing &
Communications, Gameloft

WHERE DO THEY PLAY?

The **landscape** for gaming platforms for Zs is rich and bountiful with each platform supplying an entertaining ecosystem.

Some examples: Microsoft Xbox; Sony Playstation; Nintendo; PC; Mobile (Android playstore & iOs Apple); Mac; Google Stadia; Microsoft's Mixer; and Amazon's Twitch. Apple's Arcade and Google's Stadia both launched in late 2019.



APPLE SPENT OVER

US\$500 million

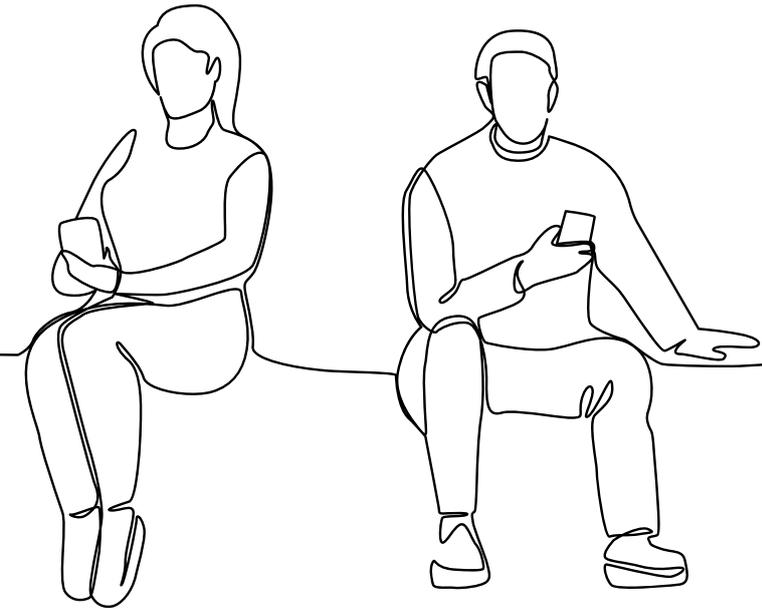
for games in Apple Arcade and by 2024, gaming is expected to generate more sales (US\$4.1bn) for Apple than TV or news. ⁽¹⁾



(1) Financial Times, 'Apple spends hundreds of millions on Arcade video game service', 2019

STREAMING

THE STREAMING WARS



While **streaming** wars are more often discussed in terms of Netflix and its rivals, it is also playing out in gaming. Streaming is the new frontier in the battle for gamers' eyeballs with big tech players Google, Facebook, Microsoft and Amazon entering the fray.

Amazon's live-streaming platform Twitch, for example, is massive with global youth.

THE TOP TEN GAMES ON TWITCH TOGETHER

attracted over

5 billion

hours of viewing in 2019!

League of Legends and Fornite both chalked up over one billion hours each in viewing time on Twitch.⁽¹⁾

While Twitch dominates live-streaming 'eyeball', other gaming streaming platforms are attracting viewers, including:

GOOGLE'S YOUTUBE GAMING, HITBOX.TV, MIRRATIV, MICROSOFT'S MIXER AND FACEBOOK GAMING.

As live-streaming youth viewers move into adulthood and their spending power improves, the focus on live streaming platforms may well evolve.

(1) StreamElements, State of the Stream 2019 report



TRENDS

Z flock to Fortnite

Brands press play on games

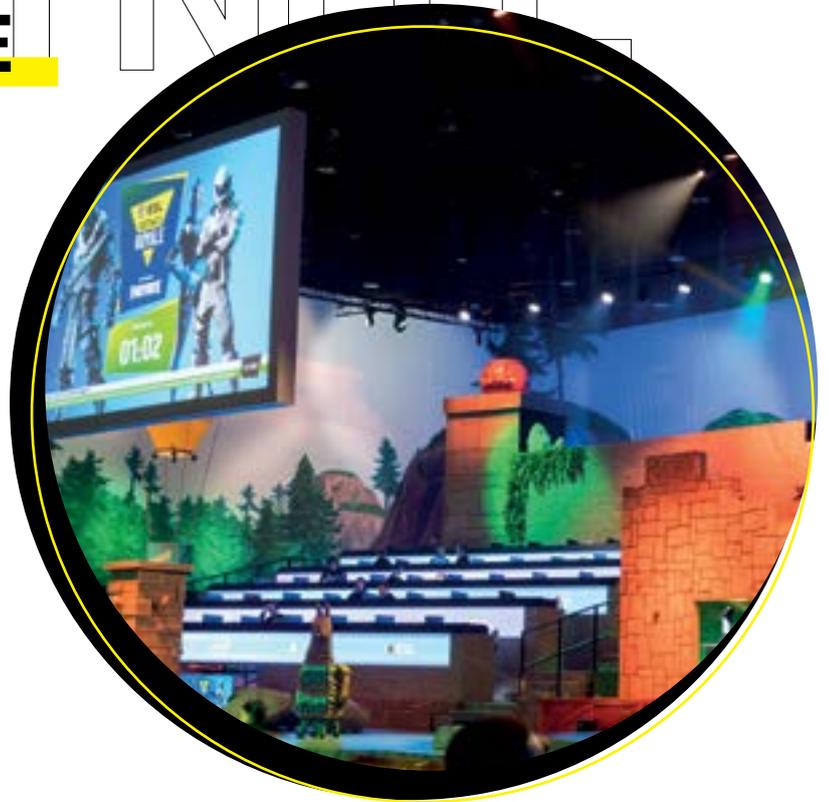
Esports evolve with Z

Influencers: the digital dazzlers

Z FLOCK TO FORTNITE

Launched

in 2017 by Epic Games, Fortnite has taken the world by storm, bringing new gamers, particularly global youth, to the gaming ecosystem. A 'survival of the fittest', free-to-play, battle royale game, 100 players are dropped into a map where they must fight to be the last player standing.



More than a game, Fortnite is also a social space, where players meet, let their personality shine through via customized avatars, and take risks without consequences. Through the game's 'Creative' mode, players can also customize their gaming experience, and are encouraged to generate their own content.

Brands enter the game by creating microtransactions that don't improve a player's performance but shape their virtual identity inside the game with skins or dance moves bought by players through in-game 'V-bucks' or real-world currency.



PRIZE MONEY BEATS WIMBLEDON & TOUR DE FRANCE

Shifting from screens to stadiums, teens gather in their thousands in packed In Real Life (IRL) venues to watch their favourite Fortnite players engage in battles. Those unable to attend the real-life event get to watch online in real time. Over two million people watched the first Fortnite world championship in New York, 2019. ⁽¹⁾

At only 16 years old, American Z Kyle Giersdor won the coveted cup and took home

US\$3 million

in prize money.

(1) CNET

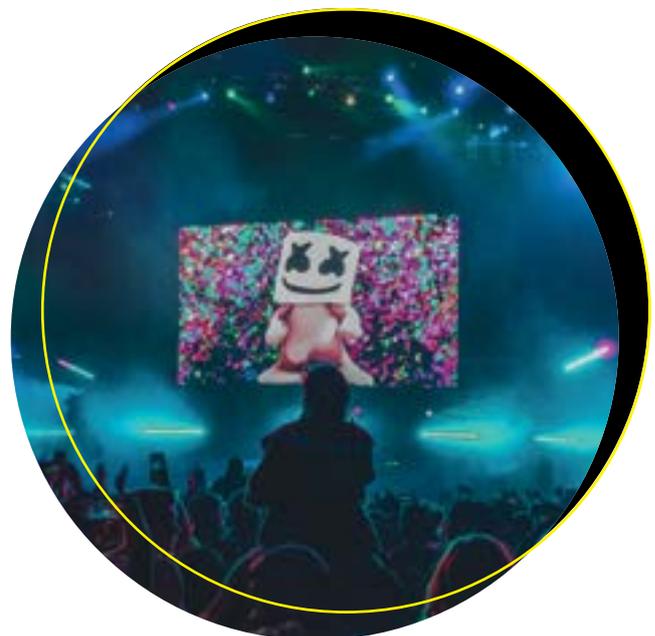


FORTNITE X STAR WARS

Prior to the release of Star Wars: The rise of Skywalker film, the last chapter in the Disney-owned 42-year Star Wars' saga, Star Wars teamed up with Fortnite to engage with gamers. An in-game, live activation - the first of a kind for both Disney and Fortnite - saw director J.J.Abrams' avatar stepping from the virtual Millennium Falcon into the game where he was greeted by avatars of gamers and unveiled a scene in a Fortnite-only clip screening.

FORTNITE X MARSHMELLO

In February 2019, DJ Marshmello performed an in-game Electronic Dance Music virtual concert to about 10.7 million Fortnite players. For the concert, Epic Games created the 'showtime mode' which meant players couldn't attack one another during the concert, but shared the experience as a community. The success of the in-game concert suggests the ability of Fortnite – and games in general – to shift from gaming into another cultural context.



FORTNITE X NINJA, THE ULTIMATE INFLUENCER

With over 22.4 million subscribers on YouTube, gamer Richard Tyler 'Ninja' Blevins is much loved by Z. Why? Relatable and authentic, he actively engages with this cohort in his streaming sessions. In March 2018 when he played Fortnite with musician Drake on Twitch he generated more than 600 000 streaming views.

The Ninja effect? Demonstrating the deep pockets of the tech giants for gaming, in August 2019 Ninja moved from Twitch, where he had over 14 million subscribers, to stream exclusively on Microsoft's Mixer. His arrival heralded a sharp peak in new streamers onto the platform - a 188% rise in three months compared to the previous three months.



Sources: BBC, Business Insider, Newzoo, Adweek, AXS, Variety

BRANDS PRESS PLAY ON GAMES

Across the world, modern youth is expecting brands to come up with the gaming goods.

In India, for example, **35%** of Gen Z (14-21) are interested in seeing brands create their own video, mobile and card games. In Nigeria, this figure reaches 45% for 14 to 21 year olds.

And brands are starting to cash in on the gaming market. Representing a huge opportunity for brands to engage with youth, over 194 million people watched esports in 2019, according to Morgan Stanley's predictions, with nearly 80% of the audience under the age of 35.



LOUIS VUITTON X LEAGUE OF LEGENDS

Luxury fashion brand Louis Vuitton recently leveraged League of Legends, the wildly popular multiplayer online battle arena (MOBA) video game from Riot Games, to reach modern youth. The collaboration saw Louis Vuitton both designing in-game skins and a real-life travel case for the game's 'Summoner's cup', which was awarded to the champions.

This gaming-luxury link-up also saw Nicolas Ghesquière, Louis Vuitton's artistic director, designing a real-life, capsule fashion collection inspired by the game.

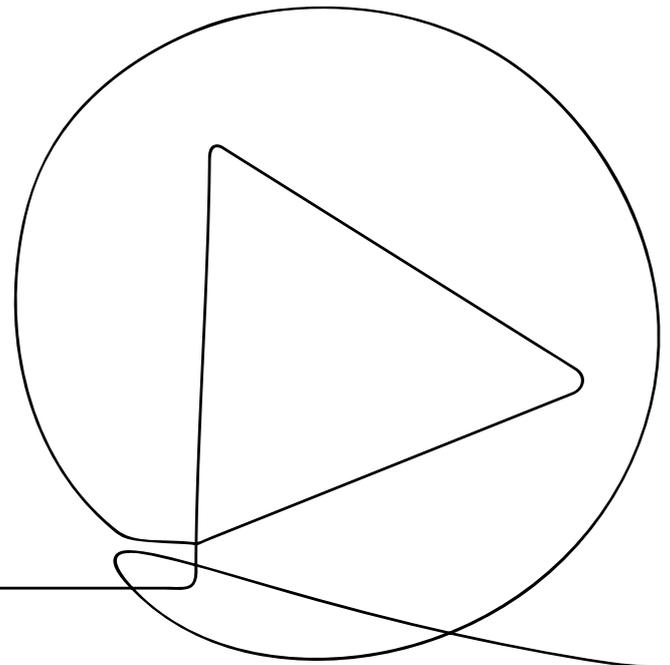
BURGER KING X LEAGUE OF LEGENDS

In January 2020 Riot Games launched the first-ever Belgian League of Legends League, sponsored by Burger King.

“ ESPORTS HAVE BEEN BOOMING FOR SEVERAL YEARS NOW – THEIR POPULARITY CONTINUES TO RISE, ESPECIALLY AMONG THE YOUNGER GENERATIONS. WE SEE A BIG OVERLAP BETWEEN THE GAMING COMMUNITY AND THE FANS OF BURGER KING. ”

Vic Dresen,
Marketing manager of Burger King ⁽¹⁾

(1) Dailysports.gg



GAMELOFT X FANTA

Soft drinks brand Fanta needed to drive brand awareness to a young, mostly teens, audience, through their new campaign – The Mouth, in Brazil. Engaging a key audience that dislikes advertising, Fanta teamed up with Gameloft and Ogilvy Brazil to develop engaging content to entertain teens through an exclusive mini-game.

‘A Saga dos Lanchos’ (The Snack Saga) game required players to run and jump between platforms and obstacles to eat as many snacks, and collect as many Fantas, as possible during the gameplay.

Instead of touching the smartphone or using directions on the PC, players controlled ‘the mouth’ in the game with their voice thanks to gameplay developed by Gameloft exclusively for the campaign. The loudest a player would scream ‘FANTA’, the higher the mouth would jump! In just two weeks, the mini-game had

464 000

unique players!

MAC COSMETICS: LIPSTICK, POWDER & TWITCH

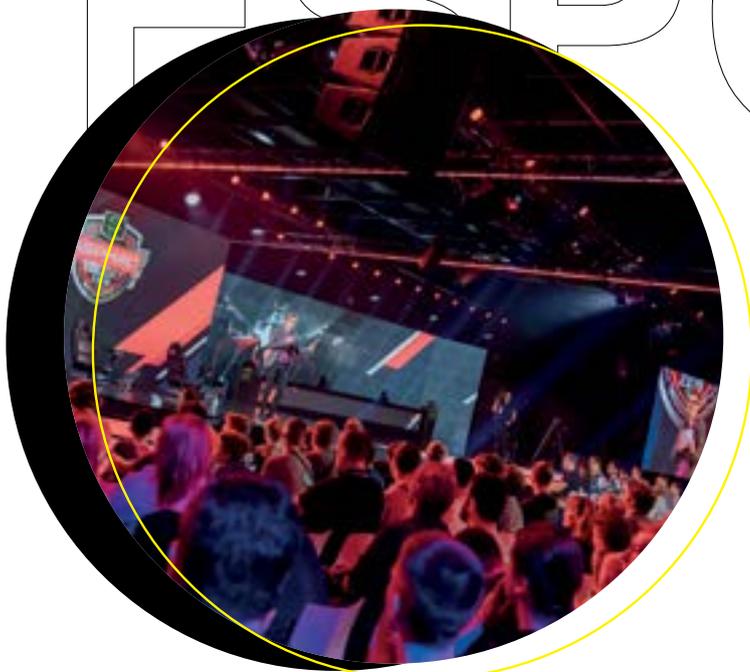
During TwitchCon 2019, Mac Cosmetics engaged directly with the gaming community, becoming the first beauty brand to exhibit at the annual video game convention. The booth featured classes such as ‘Stream Ready Makeup’, meet-and-greets with top female gamers, and giveaways.

“MAC IS A CULTURE BRAND, NOT JUST A BEAUTY BRAND. TWITCH IS A PLATFORM THAT ENCOURAGES SELF-EXPRESSION AND INDIVIDUALITY WITHIN ITS COMMUNITY, WHICH MAKES IT REALLY AUTHENTIC FOR US TO BE A PART OF THAT CONVERSATION.”

Philippe Pinatel,
MAC Cosmetics SVP ⁽²⁾

(1) Cassandra
(2) Glossy.co

ESPORTS



ESPORTS EVOLVE WITH Z

WHAT ARE ESPORTS?

Particularly popular among Zs, esports are multiplayer video games played competitively, typically by professional gamers, for spectators. Once fragmented with little infrastructure, esports are moving mainstream thanks to structured leagues, which are, in turn, attracting new spectators.

As the esports audience grows thanks to improved infrastructures so will media rights and sponsorship. By 2022 Goldman Sachs ⁽¹⁾ expects the esports audience will reach

276 million;

media rights will reach 40% of total esports revenue; and total esports monetization will hit US\$3 billion. ⁽¹⁾

194 million

estimated global audience (all ages) of esports in 2019 79% under the age of 35! ⁽²⁾

43%

of Gen Z in Asia Pacific region have watched a live gaming stream (highest percentage in the world), followed by Latin America (41%) and Europe (37%) ⁽³⁾

(1)The World of Games, From Wild West to Mainstream, Goldman Sachs. (2) Morgan Stanley. (3) Global Web Index Generation Z Report, Q4 2018

VIDS

GRADUATING IN ESPORTS!

So big is the esports appeal to Z, over 130 universities in the United States now offer scholarships dedicated to esports' players, compared to just seven universities in 2016. While Norway's Garnes Vidaregåande Skule recently became the first public high school in the country to add esports courses to the curriculum for students. ⁽¹⁾

Queensland University of Technology (QUT) created Australia's first university esports programme in 2017. Their campus features an esports arena and claims to be the first of its kind in Australia to offer scholarships to esports players. ⁽²⁾

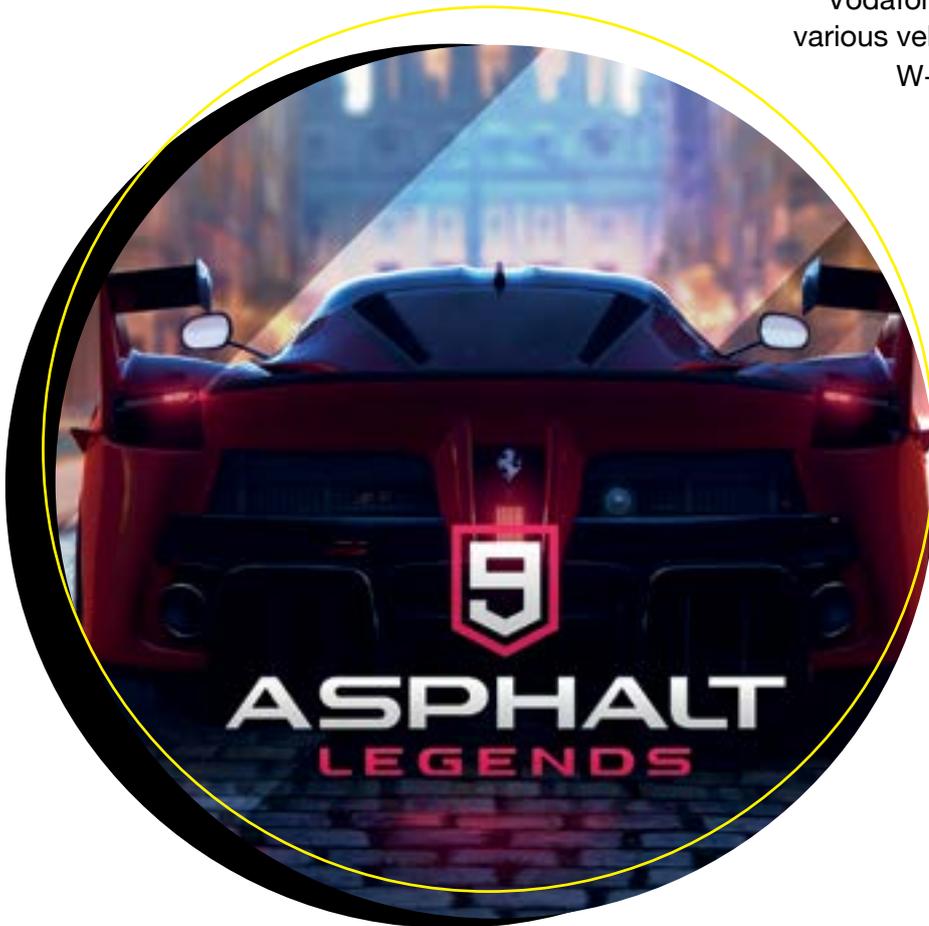
(1) Dotablast.
(2) QUT

GAMELOFT X ESPORTS X ASPHALT 9: LEGENDS

Following PC and consoles where numerous franchises, competitions and communities have flourished in the last years, mobile esports is also on the rise. In 2019, Gameloft led this trend and saw 2.2 million players worldwide take part in its Asphalt 9: Legends online tournaments.

26 finalists from 12 countries competed to win real-world cash prizes in seven high-profile esports events (ESL One NY, DreamHack Dallas, Gamescom, Milan Games Week, ESL One Cologne, ESL One Birmingham, DreamHack Atlanta).

Gameloft handed over US\$120000 in prize money across all combined tournaments, with partners such as the ESL, AT&T, Vodafone, and Black Shark, as well as various vehicle licensors like Porsche, W-Motors, and Dodge.



INTER

INFLUENCERS: THE DIGITAL DAZZLERS



REVIEW

Influencers

are the Hollywood stars of the gaming industry. They wield power among Gen Z and command high rates for their work. The most powerful can single-handedly make – or break – a video game.

Andreea Ivanescu, global digital marketing manager, Gameloft, sheds light on the relationship between influencer and games' publisher.

WHAT IS THE ROLE OF AN INFLUENCER IN GAMING?

Influencers teach other people how to play, they inspire them to play more or to discover more games. They are often more relatable and credible than a games' publisher as they share their personal lives and their own experiences with the game.

Their passion for games and their credibility makes their recommendations very powerful.

WHO ARE GAMING INFLUENCERS?

Influencers can be pro players who choose to share with others; charismatic members of the community; or people who simply want to share their love for our games with peers. Influencers have something in common – they can influence a player's choice of game and purchase behavior, and they all have a following in the gaming niche, engaging in an authentic manner.

WHAT TYPES OF INFLUENCERS DO YOU WORK WITH AND WHERE?

We work with all types of influencers. We could say they fit into three general categories: our game ambassadors; our content creators; and our sponsored partners.

For Gen Z we focus primarily on YouTube and Instagram as they are mobile-friendly and platforms where Gen Z spends a lot of time. For short-form content on these platforms we ask our creators to invite their audience to play with them. The most compelling call to action is the social one: play with me, join me, here is my user ID.

GEN Z & LIVE

“...TO LIVE AN
UNFORGETTABLE
MOMENT.”

Pierre, France

“...BECAUSE THE
MUSIC LETS ME ESCAPE
AND PARTY.”

Marie, France

“...FOR THE AMBIANCE
AND TO HAVE A GOOD TIME
WITH LOTS OF OTHER PEOPLE
THAT I DON'T KNOW, BUT
HAVE THE SAME TASTE IN
MUSIC AS ME.”

Solene, France



DATA BUZZ

DATA BUZZ



US\$4.1BN

MARKET FOR
FESTIVALS
IN 2020 ⁽¹⁾



+ 18%
TICKET SALES
CONVERSION ⁽²⁾

31% GLOBAL **GEN Z**
LIKE IT WHEN BRANDS SPONSOR
MUSIC FESTIVALS ⁽³⁾



US\$29.63 MILLION OUTSIDE LANDS MUSIC & ARTS FESTIVAL HIGHEST GROSSING
FESTIVAL IN THE WORLD IN 2019 ⁽⁴⁾

246 000 TICKET SALES - LOLLAPALOOZA BRAZIL TOP FESTIVAL BY TICKET
SALES IN 2018 ⁽⁵⁾

GLASTONBURY FESTIVAL - **900 000 FANS ON FACEBOOK** ALONE ⁽⁶⁾

(1) Festicket 2018 Branded festival activations

(2) SeeTickets

(3) Cassandra, Global Culture Forecast Report, 2018

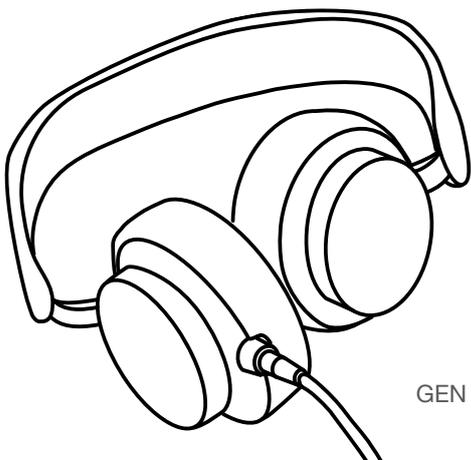
(4-6) Statista, January, 2020

INTRO

S

THIRSTY FOR REAL LIFE!

Festivals get these Generation Z digital natives, mindful of online saturation, offline to quench their thirst for actual physical experiences. After all - music is the #1 passion for **69%** of global Gen Z. What's more - **61%** can't go a day without listening to **music!**



TICKETS & Z

According to See Tickets, a global leader in ticketing for shows and events,

69% of Z use Chrome

(compared to overall population 43% Chrome and 32% Safari). Their conversion rate is also a massive 18% higher than the average rate.

Only **18%** have an iPhone compared to 52% for all ages. Z go for other brands, such as Samsung or Huawei.

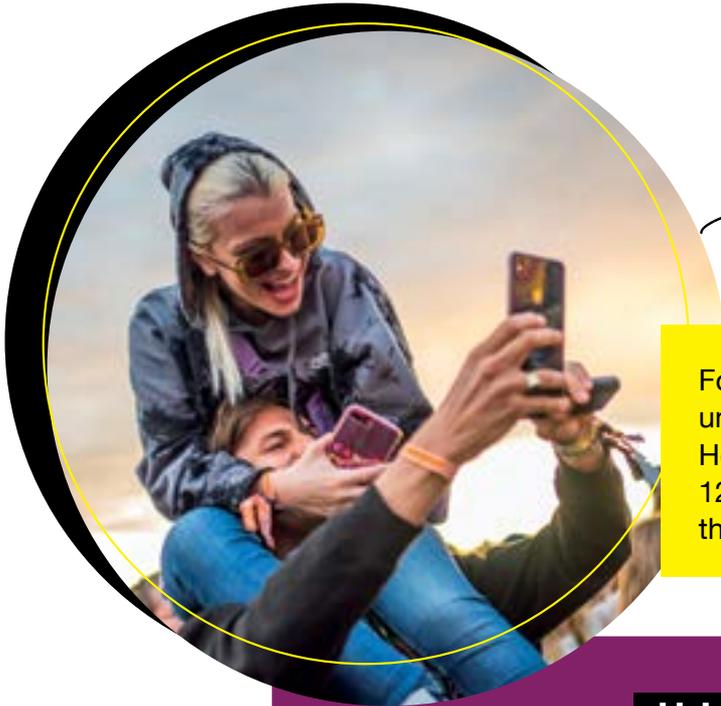
At festivals they're surrounded by other Zs who share their passion for music and the desire to drink up real life!

Festivals & brands working with them have the opportunity to create meaningful interactions with this cohort by creating an experience that extends beyond music. 31% of global Gen Z (14-21) like it when brands sponsor music festivals. ⁽¹⁾

(1) Cassandra, Global Culture Forecast Report, Popular culture and brands, 2018

SUNDOWN

ZOOM ON Z FOR SUNDOWN



For U-Live's Sundown festival in UK, understanding Z delivers more footfall. Helping to make that happen is their 12 month Z campaign cycle which taps into this generation's traits for festival success.

U-LIVE X GEN Z

A year-round campaign engages, inspires and mobilises the Sundown audience who sit at the heart of Gen Z.

Live event content to create IRL desire

CRAVERS OF EXPERIENCE

Broadcast with youth media brands

AUTHENTICITY

Brand funded content studios

CO-CREATORS

Create engaging short form content

8 SECOND CONTENT

Arm our superfans with this content

AUTHENTICITY

Convert superfans into ticket sellers

SELF-STARTERS



TRENDS

Eco-friendly music festivals

Immersive digital art spaces

ECO-FRIENDLY

ECO-FRIENDLY MUSIC FESTIVALS

Gen Z are conscious consumers. They care about the environment and the environmental legacy and footprint of themselves, their friends, family, and wider society, including brands. Festivals stepping up to green will attract modern youth.

BRANDS X FESTIVALS PULL & BEAR TAPS INTO FESTIVAL MOOD



Helping to promote the UN's 2030 Agenda for Sustainable Development, Spanish music festival Primavera Sound collaborated with fashion brand Pull & Bear in 2019 to create a capsule sustainable festival fashion line for youth. ⁽¹⁾

With a stand at the festival, Pull& Bear also gave festival-goers the opportunity to win prizes by transforming plastic into polyester. Zs could also charge their phones with solar charging points at the Pull & Bear stand and donate clothes. ⁽²⁾

(1) i-d vice
(2) Stylus, 'Branded festival activations 2019'



WE LOVE GREEN (Paris, France)

80 000 people participated in 2019 **We Love Green** festival, including 2 000 children.

An annual, eco-responsible festival in Paris that offers music concerts together with workshops and discussions on sustainable development. Live music entertains festival-goers (60 performances from 20 countries), while workshops and discussions shed light on eco-conscious practices and environmental innovations.

Why Gen Z love this festival?

ECO-FRIENDLY

100% powered by renewable energy and 0% single-use plastic. 280 174 plastic bottles unused due to eco-friendly goblets during the festival in 2019.

- In 2019, We Love Green and search engine Ecosia planted 80 000 trees, one for each festival-goer, to help offset the carbon footprint of attendees.
- The possibility to give back: Zs have the opportunity to donate to an NGO of their choice when they purchase their ticket for the festival. In 2019, €11 000 collected.
- All food locally-sourced, organic and sustainable. In 2019, 2 600 unsold meals were redistributed after the festival to charities: the festival avoided 3.1 tons of waste. ⁽¹⁾

*Green
VIBES
Only*

GEN Z EDUCATE THEMSELVES

Zs given the opportunity to gain more knowledge around sustainable development with the festival's dedicated 'Think Tank' space where activists, journalists and specialists on climate change come together to discuss and debate subjects relating to the environment.

(1) We Love Green

IMMERSIVE DIGITAL SPACES

With technology central to **Z's** lives, digital cultural hubs immerse Z in phygital experiences, from immersive theatre to VR branded content. Experiential art museums challenge the traditional museum-going experience, bringing them firmly into the 21st century and making artworks interactive.

For example, Atelier des Lumières in Paris, France takes works of art from renowned artists, such as Vincent Van Gogh and Gustav Klimt, then revamps and reframes their art into an immersive digital experience that engages this cohort.

Modern youth can also share their interactive experiences with their digital connections, maximising the Instagram moments.

Live, interactive experiences are not just digital but stretch beyond their smartphone, as the sensations experienced within the framework of the exhibit cannot be echoed outside of the physical space.

56% of Gen Z prefer to go to an interactive art/design experience compared to 44% who prefer to attend an observational art/design experience. ⁽¹⁾

In China almost **70%** of young people would prefer to go to an interactive art/design experience as opposed to an observational art/design experience (32%). ⁽²⁾

(1-2) Cassandra, Global Culture Forecast Report, Culture Spotlight on China, 2018
(3) Artnet

TEAMLAB

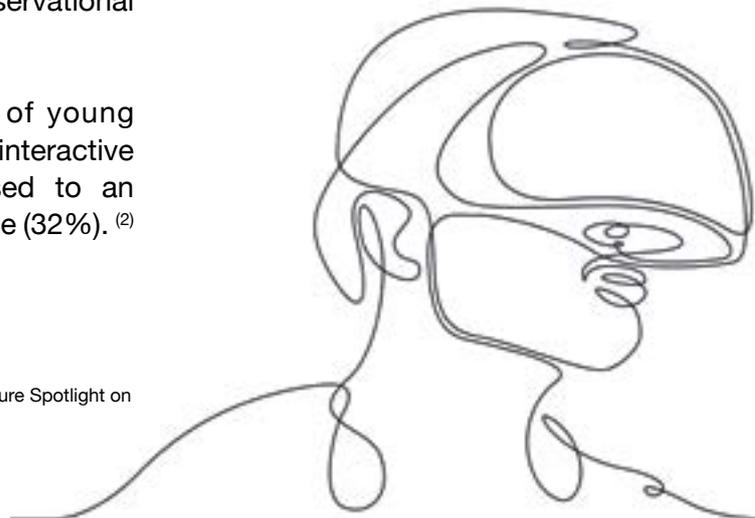
transforms the normal museum experience through its immersive digital art exhibitions in 3D.

2.3 million

people experienced the Borderless exhibit in Tokyo, Japan (2018) ⁽³⁾

“WHEN I ENTERED THE EXHIBITION, I DIDN'T EVEN NOTICE THE OTHER PEOPLE. WE ALL JUST TURNED INTO A PART OF THE SHOW.”

Sophie, 19, Munich, Germany, on TeamLab's Borderless exhibit.





GEN Z & MUSIC

“ ALMOST ALL OF THE MUSIC I LISTEN TO IS INTERNATIONAL BECAUSE I THINK IT IS MORE BEAUTIFUL TO LISTEN TO MUSIC THAT IS NOT IN MY OWN LANGUAGE, ESPECIALLY LISTENING TO MUSIC IN ENGLISH. ”

Guillaume, 15, France

“ I LISTEN TO MUSIC TO MASK THE SOUND IN MY HEAD. ”

Alex, 16, France

“ MUSIC IS IMPORTANT TO ME FOR ITS THERAPEUTIC EFFECT - LISTENING TO SONGS AND KNOWING THE LYRICS FEELS AS IF THEY'RE TAKING THE WORDS STRAIGHT FROM MY MOUTH. ”

Alice, 15, France



DATA BUZZ

DATA BUZZ



MUSIC

#1 PASSION FOR
LARGE MAJORITY OF
GEN Z (69%)⁽¹⁾



61%
OF GEN Z
CAN'T GO A DAY
WITHOUT LISTENING
TO MUSIC⁽²⁾

67% USE A STREAMING MUSIC SERVICE⁽³⁾



OVER HALF (53%) FOLLOW POPULAR CULTURE THROUGH MUSIC⁽⁴⁾

OVER 1 IN 2 (57%) LISTEN TO MUSIC SEVERAL TIMES A DAY⁽⁵⁾

MOST WANT FREE MUSIC - 71% AGREE THAT MUSIC SHOULD BE AVAILABLE FOR FREE⁽⁶⁾

NEW IS GOOD - 55% LIKE DISCOVERING NEW MUSIC (52% GEN Y)⁽⁷⁾

41% FIND NEW MUSIC FROM OTHER COUNTRIES/CULTURES THROUGH SOCIAL MEDIA (38% GEN Y)⁽⁸⁾

TUNE MORE MEANINGFUL THAN WORDS? **43% CAN ENJOY MUSIC** EVEN IF THEY DON'T SPEAK THE LANGUAGE⁽⁹⁾

(1) Global Web Index/Snapchat Report, June 2019. Q1 2018-Q4 2018, Base: 78,589 internet users aged 16-22, Q1-Q4 2018
(2-3) Cassandra Popular Culture and Music Data, 2018, Global Culture Forecast, Global Gen Z (ages 14-21)
(4-9) Global Web Index/Snapchat Report, June 2019. Survey conducted by GlobalWebIndex Q1 2018-Q4.
Base: 60,040 internet users aged 16-22 and 134,671 internet users aged 23-35

INTRO

INTRO

CROSS-BORDER

MUSIC

The **increasingly connected global** music landscape means modern youth can **easily explore** new artists and genres, crossing country borders and continents with a **simple touch** on their smartphone.

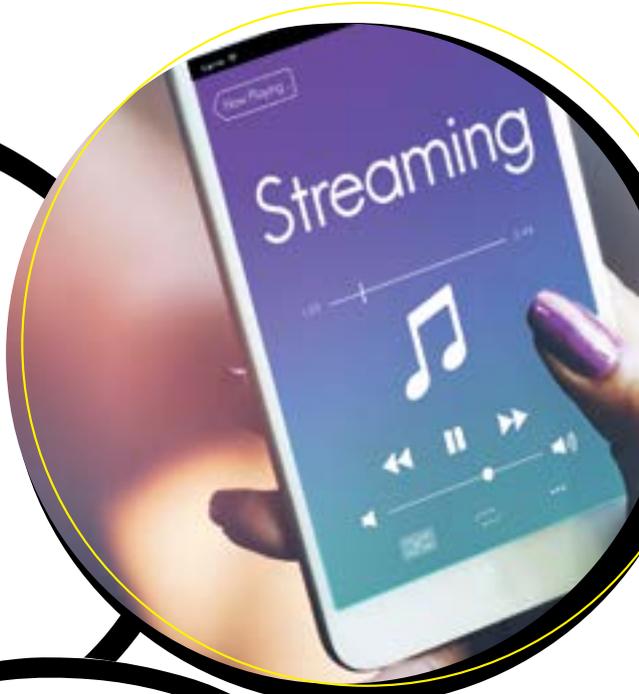
Gen Z fans are seizing opportunities to **share music** they like and love, whatever the origin and genre mix.



STREAMING SUPREME

“ WITH TODAY’S CONNECTED ENVIRONMENT AND SOCIAL MEDIA ACCESS, CONSUMERS HOLD FAR GREATER INFLUENCE, THEY HAVE THE ABILITY TO ELEVATE MUSIC THEY BELIEVE IN. FANS WANT AUTHENTICITY, TO BE CONNECTED ON A HUMAN LEVEL. WHETHER THROUGH SHARED OBSTACLES OR INSPIRATION, THEY WANT TO FEEL A CONNECTION, NOT JUST MUSICALLY BUT PERSONALLY. ARTISTS ARE MORE CONNECTED TO THEIR FANS THAN EVER, WHICH RESONATES DEEPLY WITH THIS GENERATION. ”

Dave Rocco, EVP, Creative,
Universal Music Group



“ I PREFER SPOTIFY OVER APPLE BECAUSE I DON’T HAVE TO PAY ANY MONEY TO USE IT, WHEREAS APPLE, YOU HAVE TO SPEND SO MUCH MONEY TO LISTEN TO MUSIC. ”

Amy, 14,
Washington D.C., USA

1 in 7

(1.6 billion) people on the planet are expected to stream music by 2023 ⁽¹⁾

Nearly half - **46%**
of Gen Z (35% Gen Y) - stream music at least once a day! ⁽²⁾

76%
stream music at least once a month (69% Gen Y) ⁽³⁾

and **64%**
stream music at least once a week (55% Gen Y) ⁽⁴⁾

(1) Statista, Music Streaming - worldwide, 2019
(2-4) Meaningful Brands® 2019 study

“ I LOVE SPOTIFY BECAUSE I CAN LISTEN TO MUSIC OFFLINE AND DISCOVERY/WEEKEND PLAYLISTS ARE PERFECTLY TUNED TO MY TASTES. ”

Delfina, 14, Paris, France

THE PLATFORMS: WHAT GEN Z LOVE ABOUT...



SPOTIFY

Free, ad-supported option - allows them to listen to a mix of artists from Spotify's 50 million track library on shuffle mode.

Social. Option to share their favourite tracks on their favourite platforms such as Instagram/Snapchat stories and while gaming (PS3, PS4, Xbox One).

Discovery services. Your Daily Mix and Discover Weekly are examples of some of the curated playlists released daily and weekly based on the listener's musical preferences.

APPLE MUSIC

Beats1Radio. Listeners not paying for streaming service still have access to radio station hosted and curated by DJs on Apple Music. New and fresh tracks plus human, authentic element thanks to real DJs hosting in real time.

Apple ecosystem. Owners of other Apple products like how the service works in harmony within their Apple ecosystem.

Music search tools. Users can look up songs by searching the lyrics in the platform or by telling siri the lyrics of the song.

AMAZON MUSIC

Lyrics. Users read lyrics to their favorite songs while they stream them. With the words in sync with the song, Zs learn the lyrics of the songs they love without needing to search online.

PRO DJAYLIST GEN Z PLAYLIST

Universal Production **Music**, a division of Universal Music Publishing Group and Universal Music Group, is one of the world's leading production music companies, providing pre-cleared music for films, television, video games and brands.

In a special playlist just for this report, their composers, located from all over the world, have written, composed and produced a selection of tracks that mirror the sounds and genres aimed at Gen Z today.



CHECK OUT THE SONGS

Spotify:

<https://open.spotify.com/playlist/6C8iVf0h8PURtiLAWRg7cg?si=D0oV6xKcT2iTVKI6SGEQnA>

Universal Production Music's website:

<https://www.universalproductionmusic.com/en-row/discover/playlists/4118/Gen-Z-Playlist>

ENJOY!



TRENDS

Genre & time busting music

Music without borders

Sad 'bag' songs

GENRE & TIME BUSTING MUSIC



Gen Z mindset embraces a 'post-genre world'. Just as they are moving away from traditional boundaries of gender, Gen Z are also tearing down musical boundaries; embracing sounds that are fluid and difficult to categorise.

Gen Z is comfortable blending diverse geographical sounds into their playlists. Streaming services allow this cohort to curate playlists that fuel their interest in global artists. And thanks to easy access to millions of global tracks, Gen Z is constantly exposed to a vast range of genres. The result? Their ears are open to genre-geo mash-ups.

According to a report last year conducted by Gen Z girls' media firm Sweet High, almost 97% of Gen Z women listen to 'at least five musical genres on a regular basis.'

And what about the Gen Z artists themselves? Pandora Music claims that the recent song R.I.P by 23-year-old singer Sofia Reyes can be broken into eight different genres; each genre is no more than 16% of the song, and encompasses Caribbean, Afro-Latin, and Latin influences. Multiple geographical genres in R.I.P. point to how Gen Z artists themselves are reflecting a globalised world in their music.

JUMPING BACK IN TIME

Equally fascinating, as Gen Z plunge into 'worm-holes' on their digital music journeys they're travelling through time to discover older music created by artists from previous decades. From Bob Dylan to Rolling Stones, they are enthusing over this music as if it were brand new, bringing musical legends into today's pop-scape.

Increasingly diverse musical tastes impact music-making. Blending different sounds becomes more likely when the music-makers themselves are constantly listening to varied genres.



BILLIE EILISH: **THE VOICE** **OF Z**

“ I HATE THE IDEA OF GENRES. I DON'T THINK A SONG SHOULD BE PUT IN A CATEGORY. ”

Billie Eilish,
Billboard interview, 2017 ⁽¹⁾

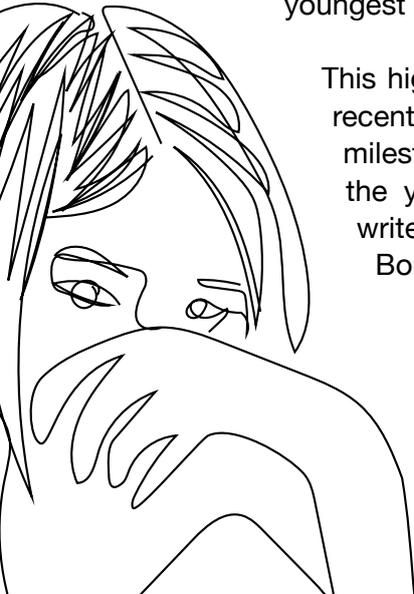
18-year

In January 2020 **18-year**-old Billie Eilish made history at the Grammys by sweeping all of the 'big four' categories – album of the year, record of the year, song of the year and best new artist – with her debut album 'When We All Fall Asleep, Where Do Go?' - becoming the first woman and youngest person to do so.

This highly-talented Gen Z also recently chalked up another milestone when she became the youngest-ever person to write and record the James Bond theme song.

With an androgynous look, low-key vocal style, aching lyrics and mix of genres, Gen Z can't get enough of this teen singer, who co-wrote her trailblazing debut album in her brother's bedroom.

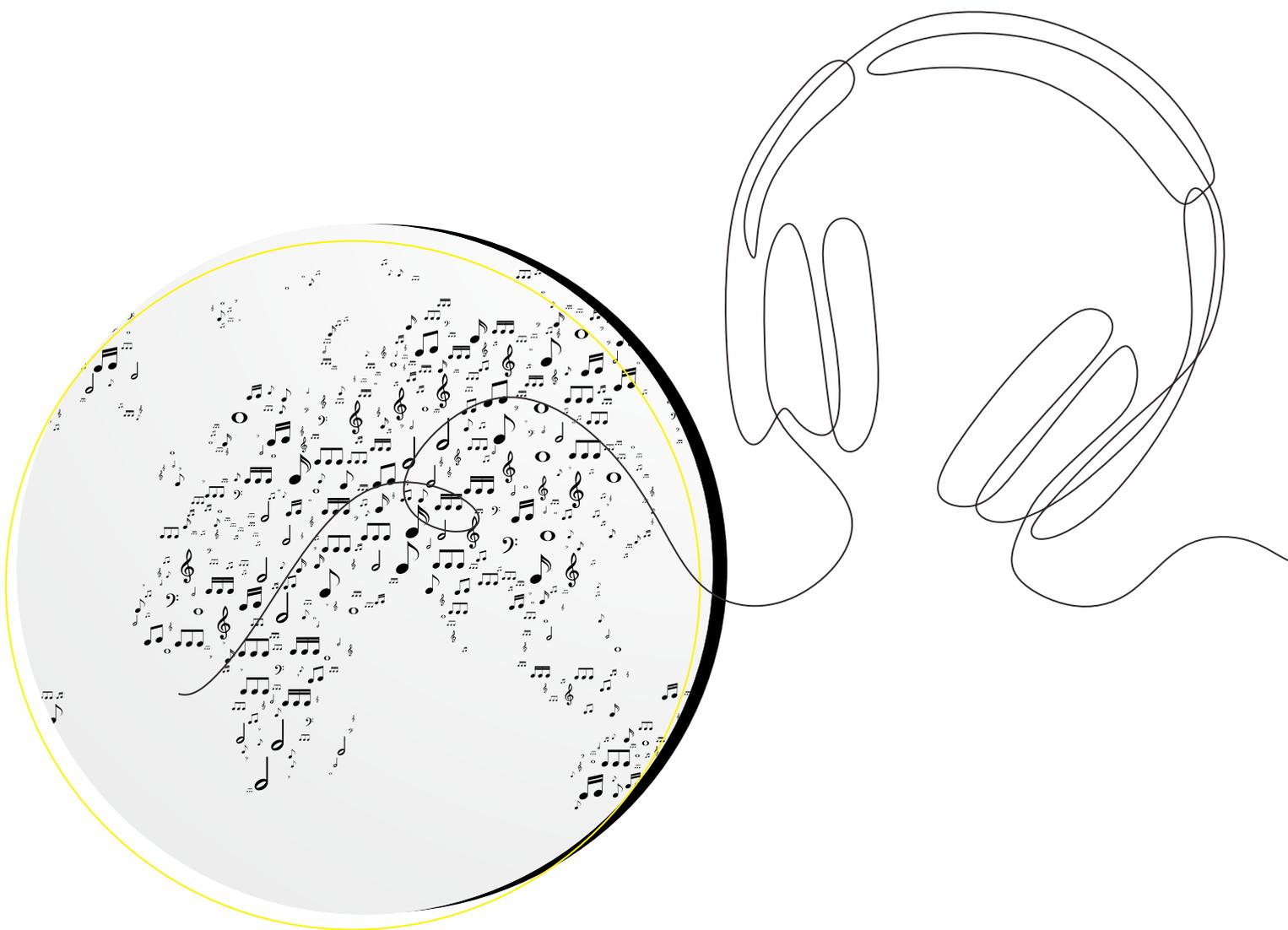
From low self-esteem to climate change, Billie Eilish holds a mirror up to the dark themes that keep today's youth up at night. In her lyrics, look and sound they find solace and meaning. Billie Eilish is the quintessential Gen Z music star.



(1) Billboard

BORDERLESS

MUSIC WITHOUT BORDERS



The 'S' tryptich - streaming, social media and smartphones – brings an increasingly connected global music landscape to Zs. With a simple swipe, they cross borders and continents to penetrate deep into lands and languages unknown, connecting to tunes, they will download and share.

Global hit Old Town Road by Lil Nas X has been described as trap, rap, and country but it could also be 'genre-less'. While K-Pop (Korean-Pop) has exploded, successfully winning-over fans the world over. K-Pop phenomenon and boy band BTS from South Korea is blazing the K-Pop trail.

VIDS

SAD 'BAG' SONGS

With **connectivity**

running through the lives of Gen Z like blood through their veins they are bombarded by content – good and bad, near and far. From economics and climate change to politics and disease, this unfiltered view of the world is feeding heightened levels of anxiety for Gen Z.

But not only this. Also, isolation and sadness. Highly connected, this young generation wants to share these emotions with each other. Indeed, 50% of millennials and Gen Z say they find camaraderie in sharing deep feelings, including sadness.

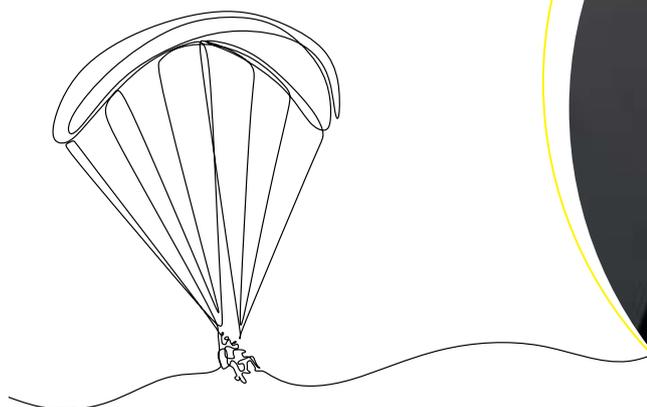
Underlining the power of music to help Gen Z share sad emotions, Spotify reports a 45.1% year-on-year rise in listening to 'bag'(sad) playlists. [Spotify trend survey, 4000 respondents 15-37 globally. February 2019. Spotify first party data, global, 2019.]

JUICE WRLD

"Everybody's got pain. Depression, addiction, heartbreak: these are human characteristics," Juice Wrld (The Guardian, 2019)

Jarad Higgins, otherwise known as 'Juice Wrld', was an American rapper and song writer who died young, at the of age 21, in December 2019. Juice Wrld helped define 'emo rap', the new sub-genre sound within hip hop that fuses pop, rap, trap and emo.

Gen Z connect with his introspective, soul-searching rap songs full of aching vulnerability, adding Juice Wrld's tracks to their bag of sad songs playlist.



GEN Z & SERIES

“ THE OFFICE – I LOVE IT BECAUSE YOU GET TO LAUGH AT HOW AWKWARD THE CHARACTERS ARE. FOR ME, IT IS THERAPEUTIC. THERE IS SO MUCH CONTENT TO WORK WITH THAT RELATES SO MUCH WITH MY GENERATION. ”

Thomas, Pennsylvania, USA.



DATA BUZZZ



+ 700 million
SUBSCRIBERS TO
STREAMING VIDEO
CONTENT IN 2019 ⁽¹⁾

NETFLIX **167 million**
SUBSCRIBERS
IN 2019 ⁽²⁾

59% OF GEN Z SAY THEY
WATCH SUBSCRIPTION SERVICES,
AT LEAST ONCE A WEEK ⁽³⁾



TOP 5 NETFLIX MARKETS FOR Z (% WHO HAVE USED THE FOLLOWING SERVICES IN THE LAST MONTH) AUSTRIA 88%, ARGENTINA 86%, BRAZIL 85%, USA 85%, AND MEXICO 84% ⁽⁴⁾

ALMOST 30% DISCOVER NEW BRANDS OR PRODUCTS FROM TV SHOWS/FILMS ⁽⁵⁾

TV ISN'T DEAD YET! 76% WATCH LIVE TELEVISION ON A TV CHANNEL ⁽⁶⁾

US\$15 BILLION - DISNEY SPENDING ON ORIGINAL CONTENT IN 2019 ⁽⁷⁾

(1) The Economist, 2019

(2) Statista, 2019

(3-6) Global Web Index Audience Report, 2019

(7) The Economist, Nov 19, 2019

INTRO

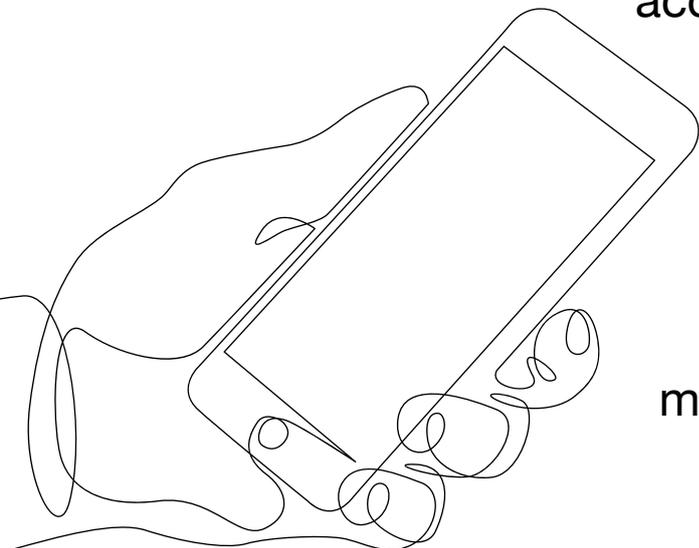
STEREOTYPE

NO TOPICS TOO TOUGH

Modern youth expects series to accurately illustrate the progressive generation they embody. They don't want storylines to shy away from hard-hitting topics like sex, suicide and gender fluidity.

Thanks to streaming platforms, Gen Zers consume and access global content, **24/7.**

There they binge on their favourite series, watching entire seasons in one sitting streamed on their – mostly smartphones - devices.



STREAMING: THE GAME-CHANGER

In 2007 trailblazer Netflix propelled a sea-change in how viewers consume TV content when they spearheaded the use of broadband connections to sell video subscriptions.

Since then, streaming has snowballed with multiple, and hard-hitting, players entering the arena. In 2019, for example, entertainment giant Disney rolled-out its much-anticipated Disney+ offer in November. By early February 2020 they had already lured 26.5 million subscribers onto the platform. While tech behemoth Apple brought AppleTV+ to the market in 2019, competing with established players Amazon and Hulu. In 2020, HBO Max, Peacock (from NBC) and Quibi are set to join the market.

Happy to slip onto streaming at any turn, streaming series are a huge pull for Gen Z.

INDIA – HOTSTAR DOMINATES

India's streaming market is one of the biggest and fastest growing in the world, and also one of the most resistant to penetration from global players. The country's video market is valued at over US\$700 million and is expected to grow to US\$2.4 billion in value by 2023 ⁽¹⁾, with over-the-top (OTT) projected to have the highest growth rate.

Disney-owned Hotstar dominates in India, used by 66% of internet users, while Netflix lags behind at 56% ⁽²⁾. Breaking new records, Hotstar recently recorded 100 million active users in a single day during the India vs Pakistan match in the Cricket World Cup on 16 June, 2019.



CHINA: LOCAL RESONATES

The country's unique landscape is pulling down the influence of global streaming players in the whole APAC region. Although Netflix is used by 71% in the Philippines, it only has 29% industry share in wider Asia.

Local players dominate: Chinese company Tencent, for example, has over 80 million subscribers for its on-demand streaming video service. Other major local on-demand companies include iQiyi, Sohu and Youku. ⁽³⁾

While China's market for online live streaming (including games and TV) is slated to be worth over US\$16 billion by 2020, according to Statista. ⁽⁴⁾

In terms of local companies, Chinese live streaming company YY attracted around 90.4 million monthly active mobile users in 2018 ⁽⁵⁾. Launched in 2005, YY currently operates major platforms including YY Live and Huya.

(1-2) Global Web Index, Online TV, July 2019. (3) flixed.io. (4) Market size of online live streaming in China 2016-2020, Statista, 2020. (5) Average mobile MAUs of China's YY Inc. Q4 2016-Q4 2018, Statista, 2019

WHAT GEN Z LOVE ABOUT...



APPLE TV+

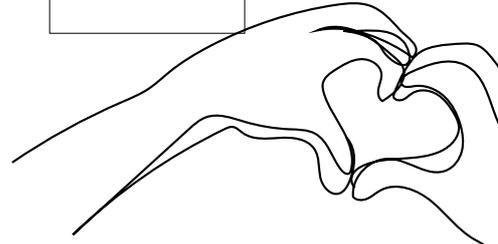
The price – it's an 'on-a-budget' streaming service!

At US\$4.99/month, Zs can have the service without breaking the bank and can share the account with up to six members of their family through Apple's 'Family Sharing' feature.

“ WE'D LIKE AS MANY PEOPLE AS POSSIBLE TO VIEW IT. THIS ALLOWS US TO FOCUS ON MAXIMIZING SUBSCRIBERS, PARTICULARLY IN THE EARLY GOING. WE THINK IT'S A BOLD MOVE. ”

Tim Cook, Apple CEO ⁽¹⁾

(1) Forbes



NETFLIX

Original programming: such as **Stranger Things** and **Sex Education**. Series they love: **La Casa de Papel**, **Elite**

AMAZON PRIME VIDEO

X-ray feature : This allows viewers to tap a button on the screen while watching certain series/films to learn more about actors in that particular scene, what song is playing, fun facts about the film/series and more.

With this feature Gen Z gain more knowledge about what they are watching all in one place, without having to use another device to search the information.

Series they love: **The Boys**

DISNEY+

It's a content powerhouse with big Z appeal!

500 movies and 7 500 TV episodes in the catalogue, including Marvel, Pixar, Star Wars & Disney film classics.

In addition to the above, Disney is launching new content set to resonate with Z – Marvel's Hero Project is an example. An original docu-series, Marvel's Hero Project showcases real-life Gen Z heroes and heroines and how they are making a difference in their community. For the project, the children are actually transformed into graphically-designed Marvel comic heroes and heroines.

CANAL+ & GEN Z



The **richness** of the Canal+ offer today fills a double need stemming from Gen Z.

Firstly, modern youth aspires to family moments, a protective bubble in a complex world. TV, like a family dinner, is one of the rare moments of shared pleasure. The arrival of Disney+ in the Canal+ offer, bringing licenses like Marvel and Star Wars, will create these unique moments.

While series like 'Years and Years' ignite family debates about the many concerns facing our times, from ecology and sexuality, to the digital world and migration.

Secondly, Gen Z is a generation on a quest for independence, and for dedicated – even tailored – content. CANAL+ new series *Validé* ['Validated'] seeks to respond to this need.

A Création originale CANAL+, by Franck Gastombide, the series is based on a young, talented rapper. Supported by his two childhood friends, one day the young rapper finds himself 'validated' by a star in his area. The new series launches end March 2020 on CANAL+ and CANAL+ Séries, in ten, 30-minute episodes. Content like *Calls* or *La Flamme*, arriving on CANAL+ in 2020, also has a big Z appeal.



TRENDS

Hard-hitting stories

Nostalgic tv

Series without borders

HARD-HITTING

HARD-HITTING STORIES

With candid storylines centered around mental health, sex and relationships these series do NOT back away from big subjects and stigma – and they’re driving eyeball attraction from Zs. They provide this generation with mature storylines that not only entertain, but also educate and spark curiosity.

SEX EDUCATION

British teen ‘dramedy’ (original Netflix series) with a coming-of-age narrative centered around sex and the teenage experience. Teen Otis, the son of sex therapist Jean, opens a bootleg sex therapy clinic for fellow school mates, while in parallel struggling with his own sexuality.

From same-sex relationships to abortion, the inclusive storyline – which plunges headfirst into teenage issues - has proved popular. Over 40 million accounts viewed the series on Netflix within its first month online. ⁽¹⁾

“That diversity, that resolve to not shy away from all sorts of off-limits issues, has transformed (Laurie) Nunn’s series—a fun, frank, often filthy look at the lives of teenagers—into something more: a sex-positive show tailored for the Gen Z generation,” Jessica Toomer, The Hollywood Reporter. ⁽²⁾

BIG MOUTH

Netflix animated series, Big Mouth, highlights preteens and the struggles they face in their transition into adolescence.

(1) Time
(2) Hollywood Reporter



SEX EDUCATION MOVEMENTS SPRING UP

Knowledge gaps around sex education for teens drove the creation of Sexplain (www.sexplain.org.uk), which empowers Gen Z to engage in sex-positive conversations. Sexplain provides sex and relationships education programmes for young people with a sex-positive, LGBTQ+ inclusive and feminist approach. Workshops are delivered by a ‘dedicated team of unembarrassable ‘sexperts’.’

“ DESPITE GEN Z HAVING ACCESS TO MORE INFORMATION THAN EVER BEFORE, THERE IS STILL AN ENORMOUS LACK OF UNDERSTANDING AROUND SEX, THE HUMAN BODY AND OUR RIGHTS. ”

Amelia Jenkinson,
CEO & co-founder, Sexplain



SEX

RAW & UNFILTERED

The low thrum of anxiety-triggering information trickles constantly into the daily lives of Gen Z. Series that reflect and tune into this phenomenon, and the mental health issues it potentially engenders, connect with modern youth, get this generation talking about subjects they are curious about, and provide a sense of relatability.

While some critics argue these series are too extreme in their subject matter, viewing raw, unfiltered characters set in challenging contexts removes feelings of isolation.

EUPHORIA

Behind Game of Thrones, Euphoria was US network HBO's second most tweeted about series. The first season finished as HBO's 'youngest-skewing current series with a core

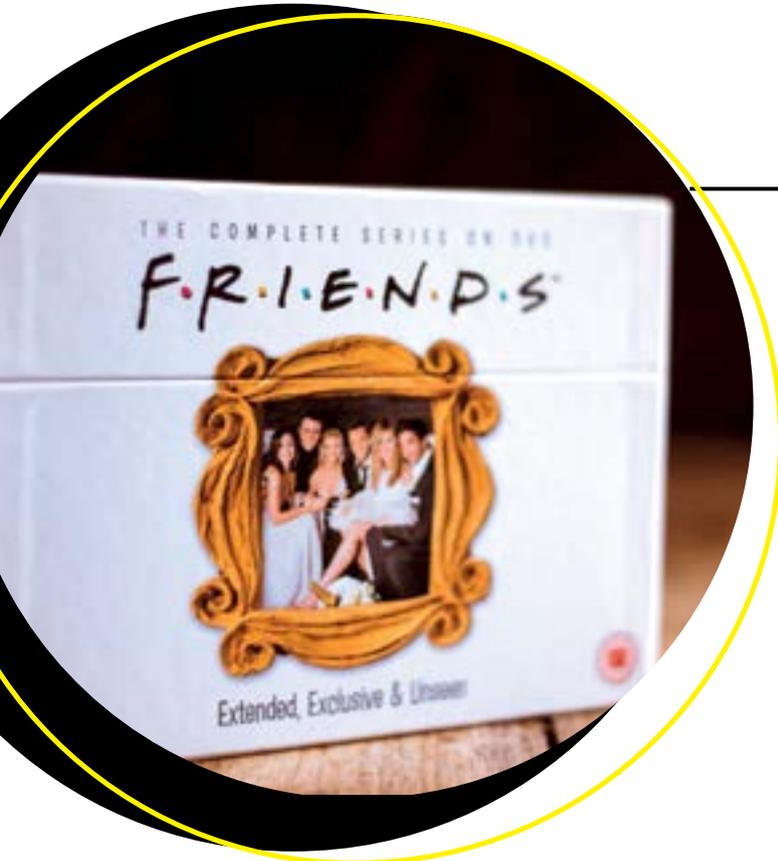
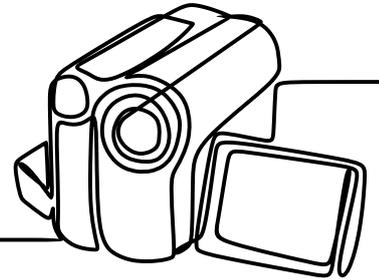
audience of adults 18-34, contributing nearly 40% of overall viewing and two-thirds of viewing on HBO's streaming platforms,' said the network. ⁽¹⁾

Praised for being a direct representation of Gen Z reality today, Euphoria tells the story of 17-year-old Rue (Zendaya), a recovering drug addict and the obstacles she faces navigating her life as a teenager.

This raw and authentic show has been criticised for being extreme - one episode featured 30 nude men in the locker room - especially for a Gen Z audience.

(1) The Wrap

NOSTALGIC TV



An escape pod from the uncertainty and unrest they feel, Gen Z really enjoy heading back in time to watch TV series from their parents' generation.

Streaming services with rich catalogues of series and films provide modern youth with 'time-travel' content on tap. Plunging into a world that existed before their always-on worlds – series produced in the 80s and 90s provide a sense of nostalgia for arguably simpler times.

Keeping these feel-good series alive and relevant, modern youth also bring nostalgic series hurtling into the 21st century through memes and short-form video related to the series and uploaded onto their favourite social media/video platforms.

THE OFFICE

52 billion minutes streamed in 2018 ⁽¹⁾

The American remake of UK's original The Office premiered over 15 years ago and ended six years ago, but remains as popular with Gen Z today as it was when first aired.

Gen Z trailblazing artist Billie Eilish used music from The Office series in her song 'My Strange Addiction' on her massively successful debut album When We Fall Asleep, Where Do We Go?

(1) The Verge
(2) Vanity Fair

FRIENDS

The hit sitcom Friends premiered in 1994, before Gen Z were even born, and ended 15 years ago. Fast forward 25 years and it's still hugely popular.

In 2018 viewers spent

54.3 million hours (the equivalent of 62,000 years) viewing it on Netflix!

For Gen Z viewers, Friends reflects a simpler time before digital distractions when friends really hung out.



STRANGER THINGS

64 million member households watched season 3 of Stranger Things within its first month. ⁽¹⁾

Immensely popular with modern youth, sci-fi series Stranger Things is set in the 1980s in the fictional town of Hawkins, Indiana where supernatural events and disturbing disappearances occur. Stranger Things' central characters are Gen Z themselves.

The hit series encourages Zs to tap into 80s' nostalgia. The show is packed with retro references from the era, like films Back to the Future (1985) and E.T. (1982) and 80s music, such as Madonna.

STRANGER THINGS X BRANDS

Nike developed its own line of Stranger Things merchandise inspired by the style on the show. The brand has reimaged three sneakers that characters on the show actually wear. ⁽²⁾

Levi's created a Stranger Things throwback collection while H&M released a 14-piece line and featured one of the show's stars in a campaign. ⁽³⁾

For the launch of Season 3, Coca-Cola created a Stranger Things inspired pop-up arcade in London for fans.

“FILM PHOTOGRAPHY IS A GREAT WAY TO CAPTURE PEOPLE, PLACES, OR THINGS THROUGH MY EYES. I ALSO LOVE SHOOTING WITH FILM BECAUSE I CAN THROW MY PHONE IN MY BAG AND REALLY FOCUS ON SHOOTING.”

Emily, 19, Boulder, USA.

NOW-STALGIC

Bringing past products into the present, Gen Z is making products from another era, particularly the 80s and 90s, a part of their daily lives. ⁽⁴⁾ Instead of just taking photos on their smartphones, they use products like Fujifilm Polaroids, Huji App, Kodak disposable cameras and film photography.

They listen to music, not just on their smartphones, but on record players. They shop for vintage clothes and are all about making the past cool again.

(1) Time
(2-3) Refinery 29
(4) Ypulse, July, 2019

SERIES WITHOUT BORDERS

Gen Z will consume a TV show, even in a foreign language, if the plotline keeps them intrigued. Language is no barrier with sub-titles available at the press of a button.

Watching international series nurtures cross-culture connections, encouraging modern youth to be entertained through content well beyond their countries' borders.



“LA CASA DE PAPEL IS THE SERIES THAT REPRESENTS MY GENERATION BECAUSE OF HOW CAPTIVATING IT IS TO WATCH.”

Loris, Grenoble, France

LA CASA DE PAPEL

Spanish series La Casa de Papel ('Money Heist') on Netflix is a global phenomenon. Over 34 million Netflix household accounts watched season three of La Casa de Papel over its first seven days after release worldwide.

(1) Variety



ABOUT

ABOUT MARKET & CULTURAL INTELLIGENCE AT VIVENDI BRAND MARKETING

Effectively managing risk requires anticipating change. Market & cultural intelligence can assist with every decision faced by a company.

The overriding purpose of most market and cultural intelligence is to help businesses grow, increase market share, revenue and profit. Robust market intelligence can therefore have a significant return on investment. By building on our knowledge and sharing our research and insights, Vivendi Brand Marketing contributes to business growth for both Vivendi and its partners.

COVERAGE

EMEA, LATAM, North America (includes Canada), APAC. Where possible, preference is given to purely global data and insights. Regional data and trends highlight cultural and consumer nuances.

METHODOLOGY

This report is based on a combination of secondary desk research and primary research interviews.

- Quantitative research reports published by market intelligence providers
- Qualitative trend research from future forecasting consultancies
- Trade and consumer journals, specialist blogs, government and NGO sources
- Monitoring and analyzing social media
- Primary interviews with experts

See Bibliography for a comprehensive list of sources.

The logo for Vivendi Brand Marketing is located in the bottom right corner. It features the text "vivendi Brand Marketing" in a white, sans-serif font. The text is set against a background of overlapping, semi-transparent geometric shapes in shades of purple and blue, creating a modern, layered effect.

**vivendi Brand
Marketing**

ABOUT

ABOUT OUR GEN Z & ENTERTAINMENT REPORT

OBJECTIVES

This report is one of a series of market and cultural intelligence reports aligned with both our client portfolio and Vivendi's business entities.

The report is, first and foremost, a business tool to give companies engaging with Generation Z a clear picture of modern youth, seen through the lens of books, games, festivals, music and series. This 360° snapshot of Gen Z - now the largest cohort in the world - explores their relationship and engagement with entertainment.

We hope you use it to inspire your content and your approach to this complex and endearing population. Enjoy!

Any questions about the Gen Z & Entertainment report and Market & Cultural Intelligence at Vivendi Brand Marketing, please email lindsey.partos@vivendibrandmarketing.com

GEN Z & ENTERTAINMENT

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