

Five Charts: Understanding Gen Z's Devices and Digital Usage

Article

Relating to and connecting with teens—the core of Gen Z—can be confusing. For marketers, reaching this cohort starts with understanding how and where teens spend their time.

Smartphones Reign Supreme

Teens are all about staying connected, and smartphones make it easy—especially as the age at which children and teens get these devices continues to trend downward.

We previously estimated that in 2013, just 49.6% of all 12- to 17-year-olds had a smartphone. In 2020, that figure will jump to 83.2%. A March 2019 survey by **Comparitech** found that 73.0% of parents said their kids had a smartphone by ages 11 to 13, and 31.0% said their kids had one between ages 6 and 10.

Tech Device Ownership of US Children and Teens, March 2019

% of respondents

	6-10	11-13	14-18
Smartphone	31.0%	73.0%	91.0%
Desktop/laptop	34.2%	57.8%	71.6%
Tablet	61.6%	54.4%	54.1%
Gaming system	34.5%	44.1%	43.2%
None	13.0%	3.4%	2.3%

Note: according to their parents; parents of adult children ages 19+ omitted

Source: Comparitech as cited in company blog, May 8, 2019

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Phones are the first sense of freedom a teen likely enjoys, so it's no surprise that they rank the device as their favorite form of technology. According to a January 2019 report by marketing agency **Fuse**, nearly half (48%) of teens surveyed cited mobile phones as their favorite technology, topping gaming (27%) and social media (20%).

Less Impressive Are Wearables and Voice Assistants

Knowing nothing other than constant connectivity, teens—true digital natives—are perhaps less impressionable than older generations when it comes to new gadgets or features.

"They're surrounded by technology, stuff is being introduced on a weekly basis," said Bill Carter, a partner at Fuse. "They see it, and it's just not all that impressive to them."

Low wearable penetration among teens illustrates their less-than-impressed mindset. We estimate that just 14.7% of those ages 12 to 17 will be smart wearable users in 2020, compared with 36.0% of those 18 to 24 and 38.2% of those 25 to 34. Lower penetration is also likely influenced by parental reluctance to buy more than one pricey device for their teens.

Smart Wearable User Penetration, by Age

US, 2020

% of Population

0-11

2.4%

12-17

14.7%

18-24

36.0%

25-34

38.2%

35-44

34.7%

45-54

22.3%

55-64

14.6%

65+

7.2%

Total

20.3%

Source: eMarketer, November 2019 (see below for notes and methodologies).

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Similarly, just 18.6% of 12- to 17-year-olds will be smart speaker users this year—less than half the levels among those ages 18 to 24 (35.1%) and 25 to 34 (42.5%). Just 36.4% of 12-to-17s will be voice assistant users vs. more than half of 18-to-34s.

“They’re not seeing the value in certain kinds of technology that other consumer groups and age cohorts are,” Carter said. Citing new voice technology as an example, he added that there are “not that many use cases for it to actually make their life any easier.”

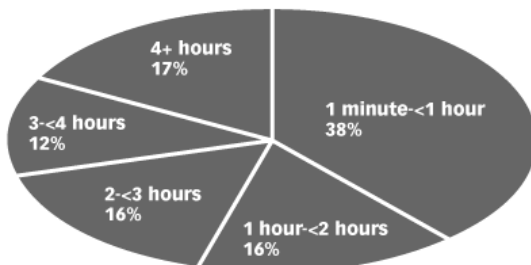
How Much Time Is Spent Online?

Almost all US teens are internet users; we forecast that 97.4% of 12- to 17-year-olds will use the internet at least once a month in 2020. But that doesn’t mean that all their time is spent online (at least not according to teens themselves, who may not be the most reliable judges when it comes to how much time they really spend online).

In **YouGov** polling from September 2019, more than half of respondents ages 13 to 17 self-reported going online for less than 2 hours on a typical day, while roughly three in 10 reported spending 3 or more hours.

Daily Time Spent Online by US Teens, Sep 2019

% of respondents



Note: ages 13-17; during a typical day browsing the internet, watching videos, playing games, chatting with friends, etc.; numbers may not total 100% due to rounding
Source: YouGov, “Youth Omnibus,” Sep 18, 2019

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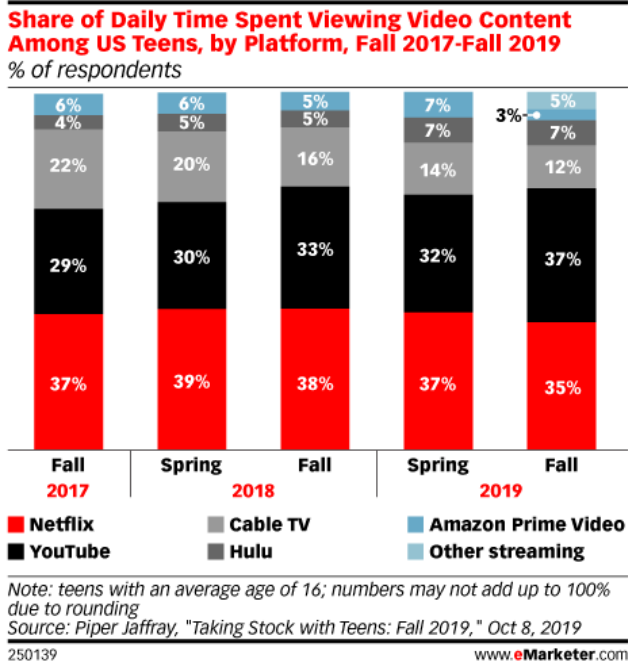
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And contrary to what older folks may think, teens aren’t just spending time “Snapchatting” friends or scrolling through Instagram. In polling for a 2019 report by the **Girl Scout Research Institute**, 68% of girls and 59% of boys ages 11 to 17 endorsed the statement, “I have discovered a new talent or interest [by exploring online].” And 60% of girls and 51% of boys agreed that they are “more connected to social issues and causes [because of the internet].”

YouTube and Netflix Top Charts with Teens

On whatever device they're using, teens are big on video. We estimate that 93.7% of 12- to 17-year-olds in the US will be digital video viewers in 2020.

YouTube is a mainstay of teens' digital activities. March 2019 polling by the **National Research Group** (NRG) identified 92% of 13- to 17-year-olds as weekly viewers. And in the fall 2019 edition of **Piper Jaffray's** twice-yearly "Taking Stock with Teens" polling, the average share of time teens spent with YouTube (37%) edged past that of Netflix (35%) for the first time since at least fall 2017.



"We believe YouTube offers a much wider scope of content that is of interest to teens, including music videos, video game streaming, celebrity streaming and other user-generated content," said Mike Olson, managing director and senior research analyst at Piper Jaffray.

But Netflix remains a major presence for teens, as 71% of US internet users ages 13 to 17 reported viewing the platform on a weekly basis, according to the NRG report.

TV Still Matters

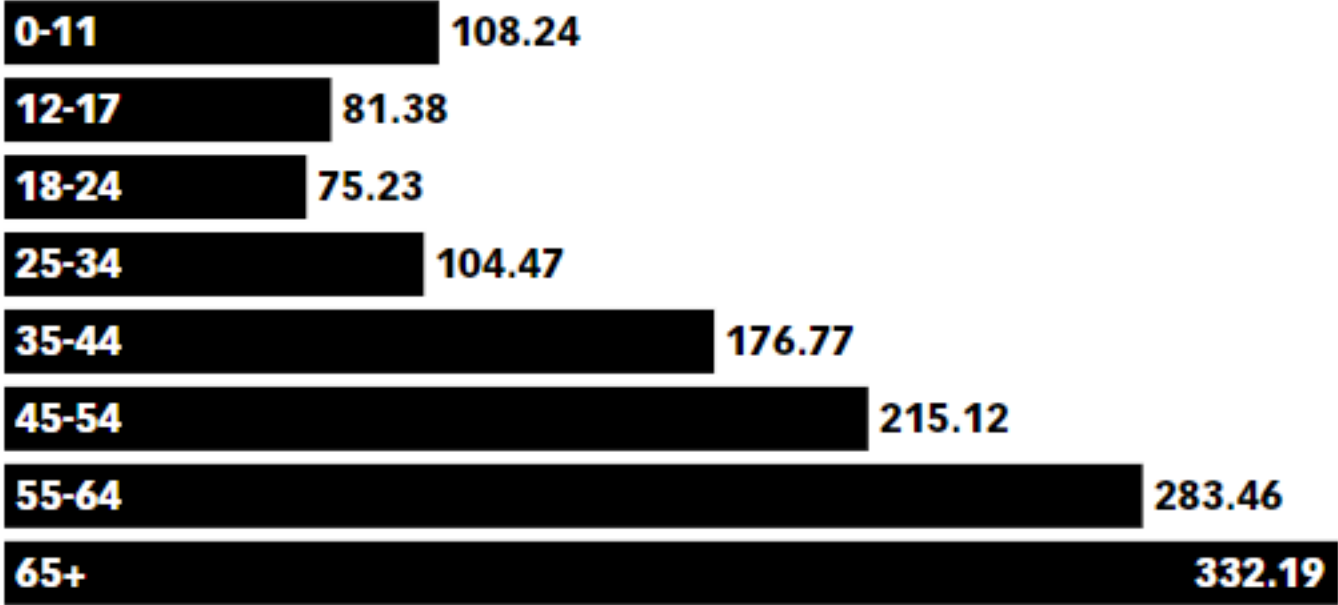
Amid all of this digital usage, it is easy to overlook traditional media like TV, but the time teens spend in front of the television isn't negligible.

We estimate that 12- to 17-year-olds will average roughly 81 minutes per day watching TV in 2020, 10 minutes fewer than that of 2019.

Average Time Spent per Day with TV, by Age

US, 2020

Minutes



Source: eMarketer, April 2019 (see below for notes and methodologies).

www.eMarketer.com

Similarly, Nielsen data for Q1 2019 showed 12- to 17-year-olds averaging more than an hour a day viewing live TV.