



85%

Of Generation Z ages 13-17 use YouTube regularly

Pew Research Center; *Teens, Social media & Technology 2018*

While not always considered a social media platform, YouTube users can create, consume, and share content, follow channels, comment on videos, and respond to others' comments. For these reasons many advertising agencies and market research firms consider YouTube a social media platform similar to Facebook, Twitter, or Instagram.

The popularity of YouTube is unparalleled among Gen Z. Multiple surveys have shown YouTube to be the most used social network for Gen Z across gender, race, and family income and education. It's the platform where Gen Z spends the most time. It's the most popular platform for keeping up to date with music and the most popular social network platform for getting news among tweens (and the second most popular among all teens). YouTube has the best content, the most trusted content, the most trusted ads, and is the most popular platform to watch both short and long video content.

Among all brands, not just video streaming or technology companies, teens consider YouTube the coolest. And it's one of the companies with the highest brand awareness. YouTube is almost as influential in making purchasing decisions as all other social media platforms combined.

YouTube stars are now more popular than traditional sport and media personalities and becoming a YouTube star is now a career aspiration for many teens. Who can blame them, collectively the 10 top-earning YouTubers take home more than \$180 million a year.

Although this report focuses on Gen Z in the U.S., YouTube has also been shown to have the highest use worldwide. Although focusing on teens, YouTube has one of the highest Customer Satisfaction scores of any social media platform among adults.

The data at right is from a 2017 report from Awesomeness, but is one of many sources that find YouTube stands out among Gen Z (other sources are covered throughout the rest of this report).



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Number 1

A 2017 report by Awesomeness found YouTube to be number one across a number of areas for Gen Z age 13 to 17.

- **Their favorite platform**

35% of Gen Z surveyed said YouTube was their favorite platform, more than any other social media platform. Snapchat was second at 21%.

- **Where they spend the most time**

35% of Gen Z cited YouTube as the social media platform where they spend the most time. The next closest was Snapchat at 22%. In a separate survey of 13 to 19 year olds, also by Awesomeness, 25% of Gen Z said they spend the most time on YouTube, again the most of any platform.

- **The platform with the most interesting content**

42% chose YouTube as the social media platform with the most interesting content.

- **The most entertaining platform**

46% identified YouTube as the most entertaining social media platform. Snapchat was second at 16%.

- **The place they go first when they're bored**

35% of Gen Z visit YouTube first when they're bored.

- **The place they prefer to watch both long and short videos**

Gen Z watches an average of 22 YouTube videos per day (13 videos under 10 minutes and 9 videos over 10 minutes). Snapchat was second with Gen Z watching an average of 17 videos per day on the platform.

- **The top app they use daily**

When asked which app they use daily, more Gen Z listed YouTube than any other social media app.

- **The platform with the most trusted people**

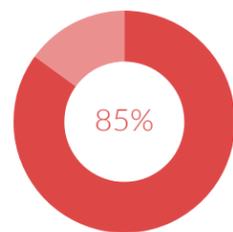
38% of teens said they trust people on YouTube most to recommend products. The next most trusted app was Facebook at 30%. This data point comes from an Awesomeness report of 13 to 19 year olds.

Source (all data points except the last bullet): Awesomeness and Trendera; Survey Name: Gen Z: Leaders of the Mobile Social Movement; Gen Z Ages: 13-17; Sample Size: 1,000; Date: July 2017. Source (last bullet): Awesomeness and Trendera; Survey Name: Gen Z: The Audience You Can't Ignore; Gen Z Ages: 13-19 (weighted toward older teens, 50% of those surveyed were 18 or 19); Sample Size: 1,504; Date: March 2017

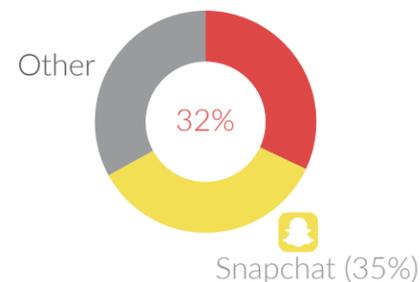
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Demographics

Percentage of teens age 13 to 17 who use YouTube



Percentage of teens age 13 to 17 who use YouTube *the most*



Platform Options: YouTube, Instagram, Snapchat, Facebook, Twitter, Tumblr, Reddit, None of the above

Percentage of 13 to 17 year olds using YouTube by demographic

YouTube has the highest use across all major demographic breakdowns for 13 to 17 year olds.

		YouTube		Next Highest
Sex	Male	89%		Instagram 69%
	Female	81%		Instagram 75%
Race	White	86%		Instagram 73%
	Black	79%		Snapchat 77%
	Hispanic	85%		Instagram 72%
Age	13-14	84%		Instagram 63%
	15-17	86%		Instagram 78%
Household Income	Less than \$30k	86%		Instagram 74%
	\$30k to \$75k	84%		Instagram 72%
	\$75k+	85%		Instagram 71%
Parental Education	High School	85%		Instagram 73%
	Some College	87%		Snapchat 74%
	College Graduate	84%		Instagram 71%

Source: Pew Research Center and the National Opinion Research Center (NORC); Survey Name: Teens, Social Media and Technology 2018; Gen Z Ages: 13-17; Sample Size: 743; Date: March and April 2018.

Find more at www.theresearch.ch

Everyday

An AP and NORC survey found that 62% of social media using teens age 13 to 17 watch YouTube every day or several times a day.

Source: Associated Press (AP) and the National Opinion Research Center (NORC); Survey Name: Teens are Taking Breaks from Social Media; Gen Z Ages: 13-17; Sample Size: 790; Date: December 2016.

Coollest



Teens said YouTube is both the coolest streaming platform and the coolest overall brand.

- | | | |
|------------|----------|----------------|
| 1. YouTube | 4. Xbox | 7. Playstation |
| 2. Netflix | 5. Oreo | 8. Doritos |
| 3. Google | 6. GoPro | 9. Nike |
| | | 10. Chrome |

Source: Google and YouGov; Survey Name: It's Lit: A Guide to What Teens Think is Cool; Gen Z Ages: 13-17; Sample Size: 1,100; Date: July 2016.

Influence



52% of Generation Z report YouTube having an influence on a purchase decision.

Other influence: Social media (62%), Retailer websites and apps (52%), Brand websites and apps (47%), Search engines (42%), Online video advertising (37%), TV advertising (34%), Online banner ad (29%)

Source: Criteo; Survey Name: Gen Z Shopper Story; Gen Z Ages: 16-24; Sample Size: 2,500; Date: 2017.

Top 5

As early as 2014, teens ranked YouTube stars as their favorites when given a list of 20 popular traditional and social media figures.

Source: Variety and Jeetendr Sehdev; Survey Name: Unknown; Gen Z Ages: 13-18; Sample Size: 1,500; Date: 2014.

#1	#2	#3	#4	#5
The Fine Bros.	Smosh	PewDiePie	KSI	Ryan Higa
Photo by The Bui Brothers Link License	Photo by Eric Charbonneau Link License	Photo by James Shaw Link License	Photo by Ken McKay Link License	Photo by The Bui Brothers Link License

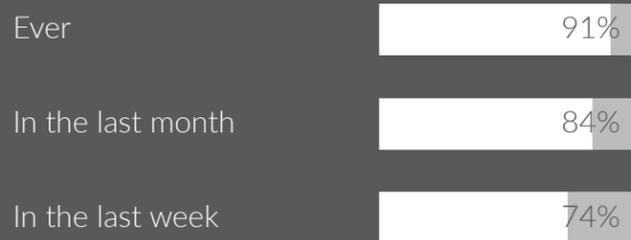
Music

According to a 2017 Edison Research survey of Gen Z ages 12 to 24, YouTube was the most popular of 12 common sources for keeping up-to-date with music (among teens that found music important in their lives). A full 80% of these Gen Z music enthusiasts indicated they use YouTube to keep up-to-date with music compared to 59% for Spotify. Family and friends was the second most common source for keeping up-to-date, with 70%. Pandora was used by 53% and the radio by 50%. About 4 in 10 used iTunes.

YouTube ranked just below Spotify (19% vs. 20%) when the same group of Gen Z music listeners was asked what source they used *most often* to keep up to date with music. Family and friends was the source used most often among Gen Z with 25%. Spotify may soon take the lead, however. It increased to 20% in 2017 from just 9% in 2016 while YouTube actually decreased from 22% to 19%.

Data from a separate study by Awesomeness and Trendera indicate that music is a popular topic for consumption on YouTube and music videos are the most popular format of content (see data to right).

Gen Z response to “Have you used YouTube to watch music videos or listen to music...”



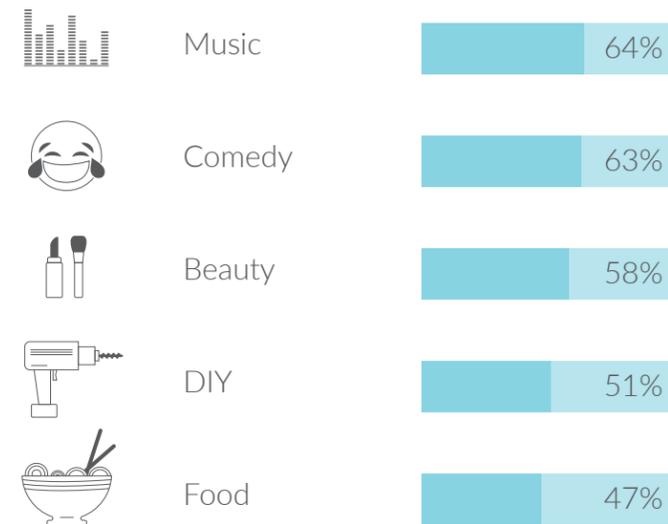
Source: Edison Research and Triton Digital; Survey Name: The Infinite Dial; Gen Z Ages: 12-24 (all ages 12+ were surveyed); Sample Size: 2,000 (total for all ages 12+); Date: January/February 2017.

Find more at www.therear.ch

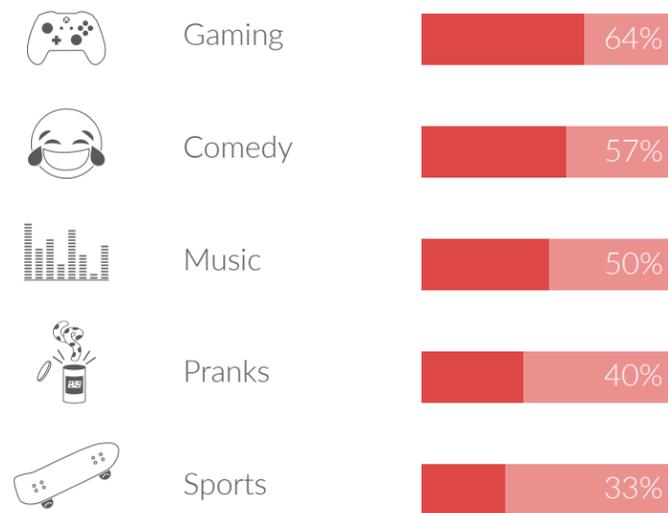
Topics

Data from the Awesomeness March 2017 survey of 13 to 19 year olds shows Gen Z's favorite online video topics. Comedy and music rank high for both boys and girls. Note that this data is for all online videos, not just YouTube.

Girls



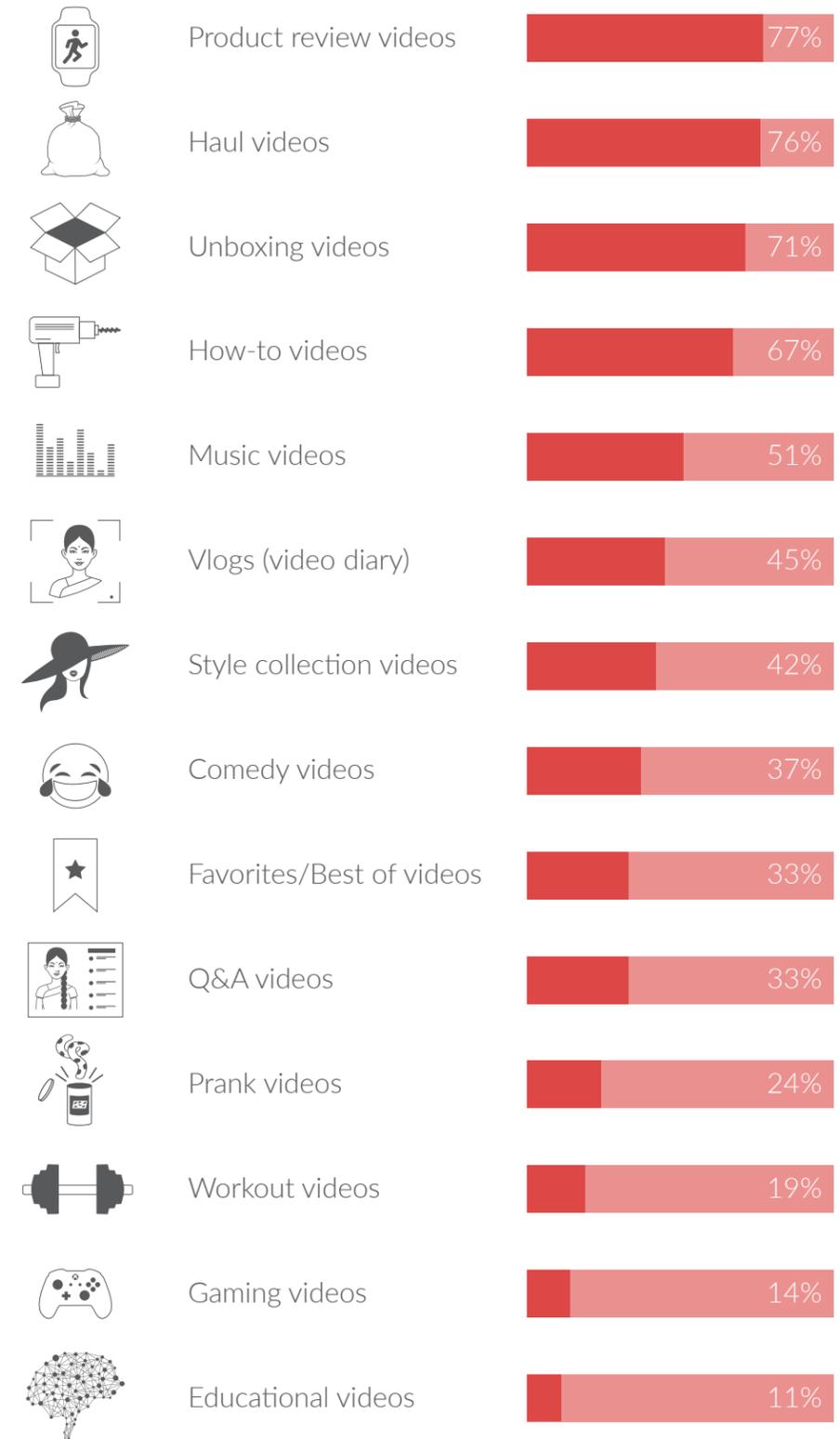
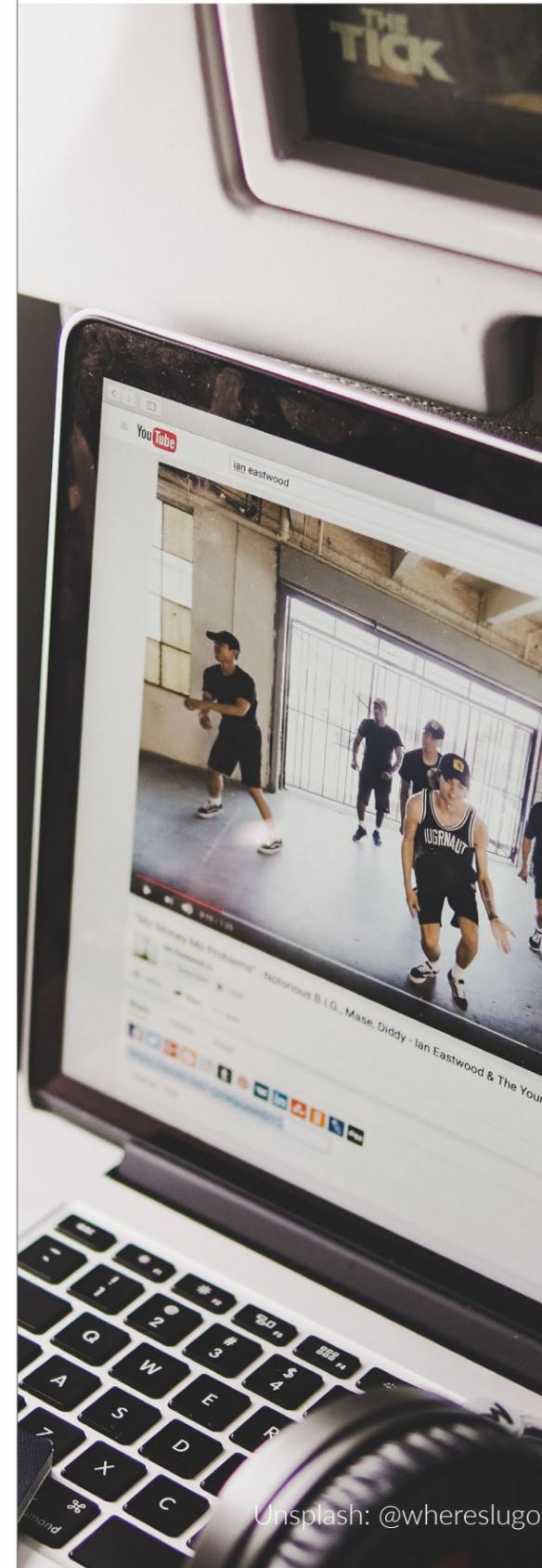
Boys



Source: Awesomeness and Trendera; Survey Name: Gen Z: The Audience You Can't Ignore; Gen Z Ages: 13-19 (weighted toward older teens, 50% of those surveyed were 18 or 19); Sample Size: 1,504; Date: March 2017.

YouTube Video Views by Video Topic (US Female Influencers)

Product discovery and review platform Influenster asked its community of female social media review writers which categories of YouTube videos they watched.



Source: Influenster; Survey Name: YouTube Viewing Behavior Survey; Gen Z Ages: 14-18; Sample Size: 11,266 for all ages 14-51; Date: October 2016.

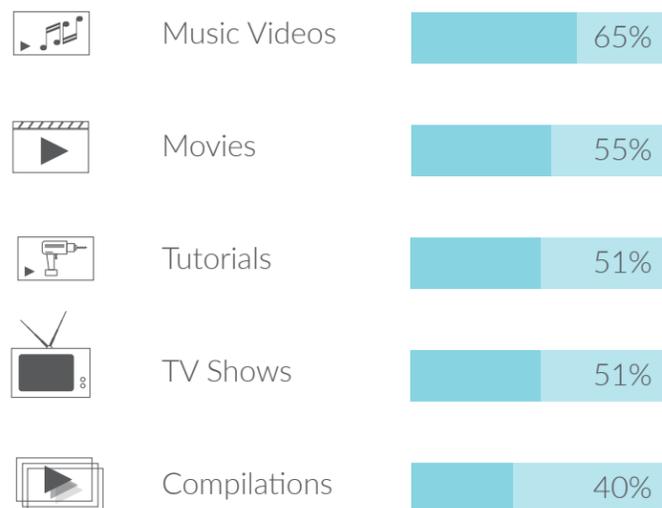
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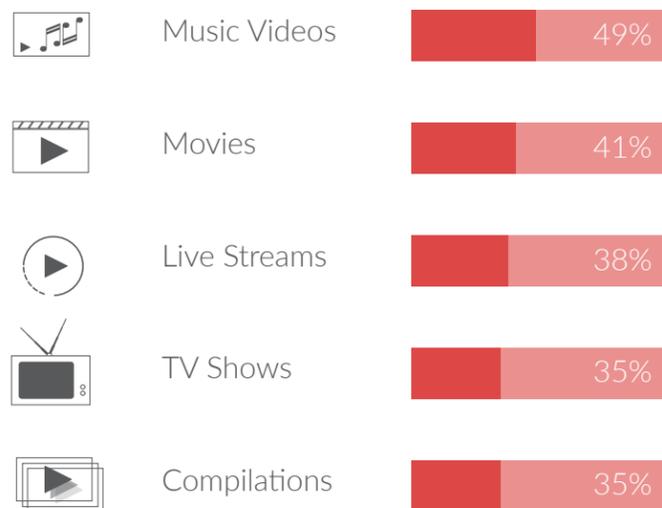
Formats

Data from the Awesomeness March 2017 survey of 13 to 19 year olds shows Gen Z's favorite online video formats (below) and preferred format (right) across online videos, streamed TV shows, and Cable TV. Note that this data is for all online videos, not just YouTube.

Girls



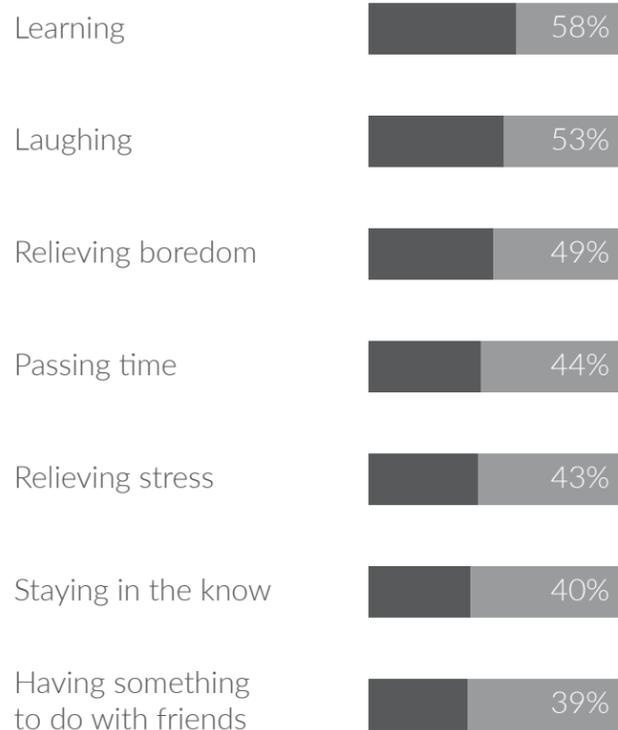
Boys



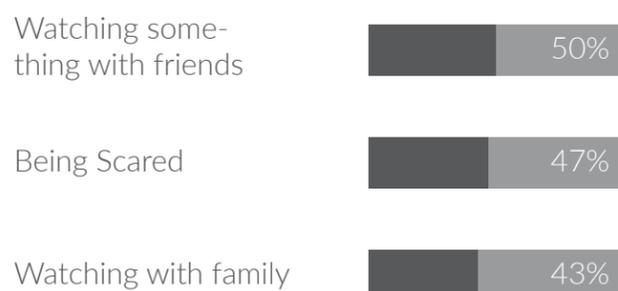
Source: Awesomeness and Trendera; Survey Name: GenZ: The Audience You Can't Ignore; Gen Z Ages: 13-19 (weighted toward older teens, 50% of those surveyed were 18 or 19); Sample Size: 1,504; Date: March 2017.

Find more at www.therear.ch

Online Videos Are Best For...



Streamed TV Shows are Best For....



Cable TV Shows are Best For...



Favorite

Across three different surveys a third of teens age 13 to 17 report YouTube being their favorite platform.

35%

Ages 13-17
July 2017

Source: Awesomeness and Trendera; Survey Name: GenZ: Leaders of the Mobile Social Movement; Gen Z Ages: 13-17; Sample Size: 1,000; Date: July 2017.

32%

Ages 13-17
April 2018

Source: Pew Research Center and NORC; Survey Name: Teens, Social Media and Technology 2018; Gen Z Ages: 13-17; Sample Size: 743; Date: March and April 2018.

31%

Ages 13-17
August 2016

Source: Collage Group; Survey Name: GenYZ Segmentation Study; Gen Z Ages: 13-17; Sample Size: 4,298; Date: August 2016.



Adobe Stock
By Drobot Dean

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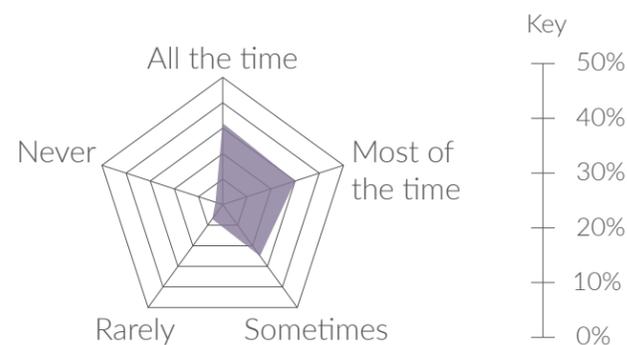
Ads

Overall, the data on the effectiveness of YouTube ads is mixed. Online you can find [many claims](#) of improved advertising performance using various YouTube advertising products. However, these claims are hard to independently verify and their rigor is unclear. Academic literature has tested [some aspects](#) of video advertising, but has trouble keeping up with the pace of innovation and therefore many newer video advertising products have gone untested. Moreover, much of this work focuses on adult populations, there is little work focusing specifically on Generation Z.

Self-reported YouTube advertising effectiveness from Gen Z tends to skew somewhat negatively. While 54% of 16 to 24 year olds [report](#) YouTube having an influence on a purchase decision, almost as much as social media as a whole (63%), this doesn't imply the influence comes from ads themselves.

The Center for Generational Kinetics did [find](#) in January 2017 that 30% of teens trust YouTube ads, the most of any social media platform. On the other hand a 2017 Forrester survey of 12 to 17 year olds [found](#) that 39% say that YouTube has

Percentage of 13 to 17 year olds that distract themselves from the portion of YouTube ads before they can be skipped



Source: The Research and the National Opinion Research Center (NORC); Gen Z Ages: 13-17; Sample Size: 920; Date: November 2018.

Find more at www.theresearch.ch

too many ads, by far the highest percentage of the four platforms surveyed which included Facebook (26%), Instagram (11%), and Snapchat (11%). However, this data can also be viewed positively, the majority of those surveyed still reported that YouTube did *not* have too many ads!

In The Research's joint November 2018 [survey](#) with the National Opinion Research Center, 62% of 13 to 17 year olds reported distracting themselves all or most of the time while watching the non-skippable first five seconds of skippable YouTube ads. Only 10% said they rarely or never distract themselves.

One common strategy to drive brand engagement is to partner with YouTube influencers. YouTube even has a [short course](#) for creators on how to land brand partnerships. Some data suggests Gen Z is receptive to this type of marketing. Awesomeness [found](#) that 38% of Gen Z ages 13 to 19 trust people on YouTube to recommend products, the most of any social media platform. A [survey](#) by Bluecore found that 18% of Gen Z learn about new products on YouTube, without specifying whether this was through ads or videos themselves. These figures were comparable to Instagram (20%) and Facebook (23%).

However, many brands are continuing with traditional video advertising strategies; and social media platforms are responding by experimenting with improved video ad formats (according to a 2015 [article](#) by TheNextWeb all 100 top global brands advertise on YouTube). YouTube has a [long history](#) of advertising experimentation and innovation and continues to roll out new features.

While YouTube has long had skippable ads, what they call "TrueView," in early 2018 YouTube [announced](#) that they were allowing pre-, mid-, and post-roll non-skippable ads of 15 to 20 seconds. They have also introduced different flavors of TrueView to help with different brand strategies. And the company announced a new suite of [ad extensions](#) in October of 2018 that are linked to YouTube search history (YouTube is the [second](#)

[most trafficked search engine](#) in the world). The ad extensions allow advertisers to better target users; so, for example, if a user watches a trailer for an upcoming film they would be able to see show-times in their area natively in YouTube.

YouTube is also currently moving some ads to a format called "ad pods," which bundle ads together into longer ad segments. Google, YouTube's parent company, [explained](#) their reasoning in a November 21st, 2018 post: "Our recent user experience research suggests that in addition to factors such as the length of ads, viewers are quite sensitive to the frequency of ad breaks, especially during longer viewing sessions." Instead of having, say, four ads each shown individually throughout a video, ad pods might have two longer ad segments of two videos back-to-back: a reintroduction of the traditional TV commercial break onto the YouTube platform.

Meanwhile, after a long ban, Facebook is [reintroducing pre-roll ads](#) to some videos. Facebook's initial strategy is to use pre-roll ads if there is a high likelihood the user sought out the video content preceded by the ad, for example if the video appeared in a user search. More organic content like videos appearing in a friend's feed will still keep the mid-roll format.

Research does suggest that not all video advertising is created equally (see chart at right).

Even more advanced advertising innovations are likely in the near future. In mid-June of 2019 YouTube released a [new augmented reality \(AR\) feature](#) that allows viewers to virtually try on makeup while following along with beauty videos. MAC Cosmetics is the first brand to partner with YouTube on the new AR capability.

Percent positive receptivity to video ad formats of Gen Z ages 16-19

Mobile reward video

 Ads that offer in-app or other rewards for completing



Skippable pre-roll

 Ads that run before video content, but are skippable



Skippable vertical video

 Ads that are skippable in the vertical video format



View to play

 Video ads that are required before a user plays a game



Social autoplay

 Videos that play automatically on page view or scroll



Non-skippable pre-roll

 Ads that run before video content, but cannot be skipped



Source: Kantar Millward Brown; Survey Name: Ad Reaction: Gen X, Y and Z; Gen Z Ages: 16-19; Sample Size: 7,087 total across 39 countries, U.S. sample size unknown; Date: Unknown.

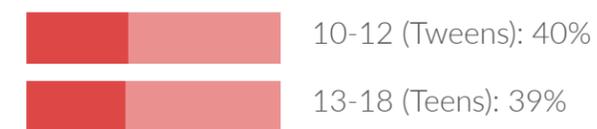
Find more at www.theresearch.ch



News

YouTube is a popular source of news for Gen Z. The 2017 Awesomeness survey found that YouTube was the number one social media news source for teens age 13 to 19. In their special news-specific survey Common Sense Media found that 39% of Gen Z ages 10 to 18 use YouTube to get news, this compares to just 21% for adults (Pew Research also found that 21% of adults get their news from YouTube). Of the 10 to 18 age group that uses social media for news, 21% prefer YouTube over any other source.

The percentage of Gen Z that use YouTube as a social media news source among a list of popular social media apps.



Source: Common Sense Media using SSRS Probability Panel; Survey Name: News and America's Kids; Gen Z Ages: 10-18; Sample Size: 853 total for 10-18; 10-12, n=261; 13-15, n=272; 16-18, n=320; Date: January 2017.

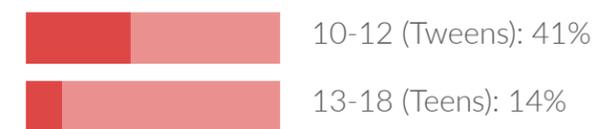
Estimates of Gen Z using YouTube for news.



0% —————

The percentage of Gen Z that prefer to use YouTube as a social media news source among a list of popular social media apps.

Among teens that use social media for news.



Source: Common Sense Media using SSRS Probability Panel; Survey Name: News and America's Kids; Gen Z Ages: 10-18; Sample Size: 621 total for 10-18; 10-12, n=151; 13-18, n=470; Date: January 2017.

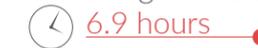


Time Watching

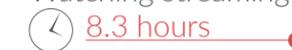
Average number of hours per week spent watching the following formats across all platforms for Gen Z age 16 to 24.

Video ad-creation platform VidMob found that for every hour of leisure on a computer or mobile phone Gen Z (ages 16-24) spends 25 minutes watching video. The data below come from Criteo's 2017 Shopper Story; Gen Z ages 16 to 24 reported spending a whopping 23 hours per week watching streaming video content.

Watching online videos



Watching streaming TV shows



All streamed video content



Source: Criteo; Survey Name: Gen Z Shopper Story; Gen Z Ages: 16-24; Sample Size: 430; Date: 2017.

Average number of short and long YouTube videos watched per day for Gen Z age 13 to 17

According to the 2017 Awesomeness report "Gen Z: The Audience You Can't Ignore," 25% of 13 to 19 year olds report spending the most time on YouTube, the highest percentage of any social media platform. The survey also found that YouTube is the most popular social media platform for both short (under 10 minutes) and long (over 10 minutes) video content: 46% of Gen Z prefer YouTube for watching short content, while 71% prefer YouTube for watching long content. The average Gen Z youth watches 13 short videos and 9 long videos on YouTube per day, the most of any social media platform. Across all social media platforms the average teen reports watching 68 videos per day.

The figures here impute a weekly online video allotment larger than the 6.9 hours above. If the average short video is 5 minutes and the average long video is 12 minutes this imputes a weekly watch time of 20.2 hours of online video on YouTube alone (to say nothing of other social media platforms). The difference in findings could be due to the ages surveyed (16-24 vs. 13-17), general survey methodology, misestimation by survey respondents, and differences in video definition. While older generations might consider YouTube a platform for watching general "online videos," Gen Z may consider some YouTube content to be streaming TV, which would fall into the 8.3 hour bucket above, rather than the 6.9 hour bucket of general "online videos."

Short YouTube videos
10 minutes or less



Long YouTube videos
10 minutes or more



Source: Awesomeness and Trendera; Survey Name: Gen Z: Leaders of the Mobile Social Movement; Gen Z Ages: 13-17; Sample Size: 1,000; Date: July 2017.

3+ Hours

Google's December 2016 survey of 13 to 17 year olds found that 7 in 10 teens watch 3 or more hours of online video, TV, or movies per day on their smartphone.

Source: Google and Ipsos; Survey Name: Generation Z: New insights into the mobile-first mindset of teens; Gen Z Ages: 13-17; Sample Size: 2,013 (Total for 13-34); Date: August 2016.

Alvaro Felipe
Unsplash: @alvarofelipe

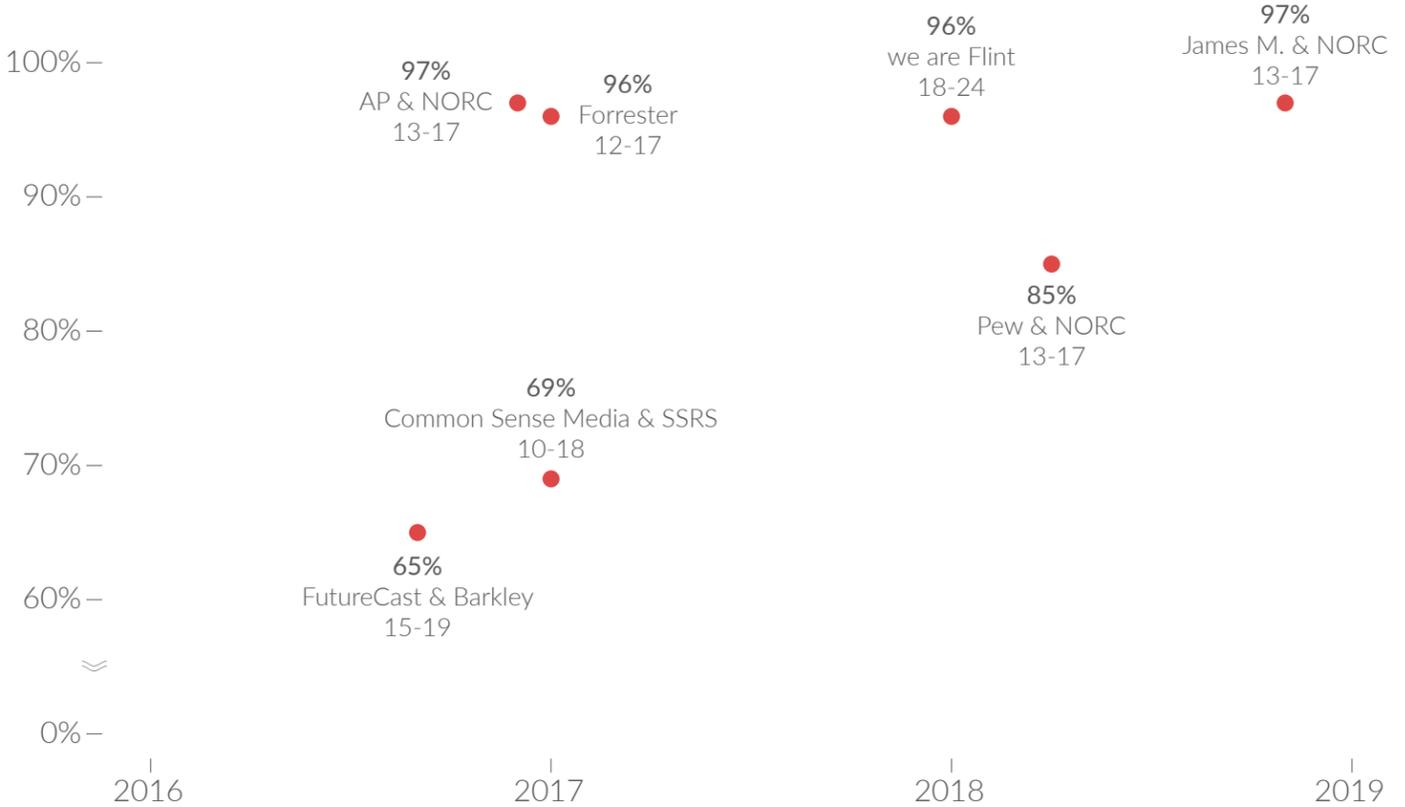
Usage

YouTube Usage Estimates

Seven YouTube usage estimates are presented below. These estimates are based on seven different surveys conducted between September of 2016 and November of 2018. Next to each estimate the percentage of self-reported YouTube usage is shown along with the organization that conducted the survey and the ages surveyed.

The 85% usage estimate at the beginning of this report is offered as the top-level Gen Z usage figure for YouTube. There are four reasons for this. First, this was a relatively recent survey (March and April of 2018). Second, this was a high-quality survey commissioned by the Pew Research Center and conducted by the National Opinion Research Center (NORC). Third, the survey was given to 13 to 17 year olds, squarely a Gen Z population; surveys with respondent ages between, say, 18 and 24 may be considered to span both Gen Z and Millennials depending on the definition. Fourth, the survey question asked explicitly about usage.

The November 2018 survey commissioned by The Research was also conducted by NORC and is even more recent. It also surveyed Gen Z ages 13 to 17. However, this figure is an implied usage percentage based on a question about how often teens distract themselves from skippable YouTube ads before the “Skip” option becomes available. Only one percent of users respondent that they did not use YouTube, while two percent skipped the question, for an implied usage of at least 97%. It may be that usage increased over the course of the year and so both figures are accurate. Indeed, several sources suggest that Gen Z self-reported YouTube usage increased in recent years. However, it might be easiest to simply peg YouTube usage of 13 to 17 year olds in a range between 85% and 97%.



YouTube Usage Estimates Survey Details

2016 Surveys

Source: FutureCast and Barkley; Survey Name: Getting to Know Gen Z: How the Pivotal Generation is Different from Millennials; Gen Z Ages: 15-19; Sample Size: 2,039 across all Gen Z and Millennials; Date: September 2016; YouTube Usage: 65%; Details: No survey details are available.

Source: Associated Press (AP) and the National Opinion Research Center (NORC); Survey Name: Teens are Taking Breaks from Social Media; Gen Z Ages: 13-17; Sample Size: 790; Date: December 2016; YouTube Usage: 97%; Details: Respondents were asked about YouTube usage in Question 4 if they had previously answered Question 1 “Do you access the internet on a cell phone, tablet or other mobile device, at least occasionally?” with “Yes” (97% responded in this way) or “No, I don’t use the internet on a mobile device” (2% responded in this way) or they answered Question 3 “Do you do any of the following online or on your cell phone?” with “Use a social media site” (88% responded in this way). The population that met either of these conditions and was shown Question 4 was 786, very close to the total survey sample size of 790. The wording of Question 4 itself was “How often do you use the following, if at all?” Nine different social media sites were shown along with six different usage rates ranging from “Almost constantly” to “Never.” “Don’t know” was also an option. The question could also be skipped. YouTube usage is implied by the percentage of respondents that answered with a usage frequency other than “Never.” The number of respondents that answered “Don’t know” or skipped was negligible. This was a probability based survey.

2017 Surveys

Source: Forrester Consumer Technographics; Survey Name: North American Youth Survey; Gen Z Ages: 12-17; Sample Size: 4,502; Date: January 2017; YouTube Usage: 96%; Details: No survey details are available.

Source: Common Sense Media using SSRS Probability Panel; Survey Name: News and America’s Kids; Gen Z Ages: 10-18; Sample Size: 853 total for 10-18 (10-12 n=261, 13-18, n=592); Date: January 2017; YouTube Usage: 69%; Details: Question wording was “Do you ever use any of the following social-networking sites?” A list of seven social media sites followed with the respondent selecting those they used. “Another social-networking site” and “I do not use any social-networking sites” were also options. This was a probability based survey.

Source: Awesomeness and Trendera; Survey Name: Gen Z: The Audience You Can’t Ignore; Gen Z Ages: 13-19 (weighted toward older teens, 50% of those surveyed were 18 or 19); Sample Size: 1,504; Date: March 2017; YouTube Account Membership: 78%; Details: Question asked about YouTube account, not usage per se. You do not need an account to use YouTube. No other survey details are available. Not shown on chart since the survey was about account membership not usage.

2018 Surveys

Source: we are Flint; Survey Name: Social Media Demographics 2018; Gen Z Ages: 18-24; Sample Size: 2,007 total for all ages 18-65; Date: January 2018. YouTube Usage 96%; Details: Population was all online US adults 18+. Question details are unknown.

Source: Pew Research Center and the National Opinion Research Center (NORC); Survey Name: Teens, Social Media and Technology 2018; Gen Z Ages: 13-17; Sample Size: 743; Date: March and April 2018; YouTube usage: 85%; Details: Question wording was “Do you ever use any of the following social media sites?” A list of seven social media sites was presented with the respondent selecting those they used. “None of the above” was also an option. The question could also be skipped. This was a probability based survey.

Source: The Research and the National Opinion Research Center (NORC); Gen Z Ages: 13-17; Sample Size: 920; Date: September to November 2018; YouTube Usage 97%; Details: Usage is implied based on a question that asked about YouTube ad skipping behavior, 1% indicated they didn’t watch YouTube, while 2% did not answer the question. This was a probability based survey.