Gen Z
Evolving Social Media and Sports Preferences

Trends in China, Japan and the UK as we head into the 2022 Beijing Olympic Games

The pandemic has brought all generations into the digital world to work, connect, socialize, and be entertained. Members of Generation Z have lived their entire lives in the digital world, but as they come of age they are cementing their status as purveyors of culture, drivers of consumer growth, and redefining the media landscape. Their lives are lived through mobile devices and social media, their lifestyles are defined by the content they consume, and they are shaping moments like the Olympics through their values.

This is no more apparent than in sports, lifestyle and fashion. As the world prepares for the 2022 Beijing Winter Olympic Games during a global rise in Omicron variant COVID-19 cases, engaging Gen Z audiences across digital platforms will showcase how well the world has transitioned to a digital-first model to allow for engagement with cultural moments.

To commemorate the launch of BlueCurrent China, the TRUE Global Intelligence research practice of FleishmanHillard launched a global study of Gen Z in the key markets of China, Japan and the UK in Q4 2021, to understand how the generation plans to engage in this moment. The study of 3,000 16–24-year-olds showcases Gen Z poised to shift the way cultural moments are made.

Suki Zhao, the head of BlueCurrent China, commented, "We've seen that the younger generation is leading the way in this ever-changing landscape of culture, sports and social media. They are the standard bearers for the current digital-led cultural wave of globalization.

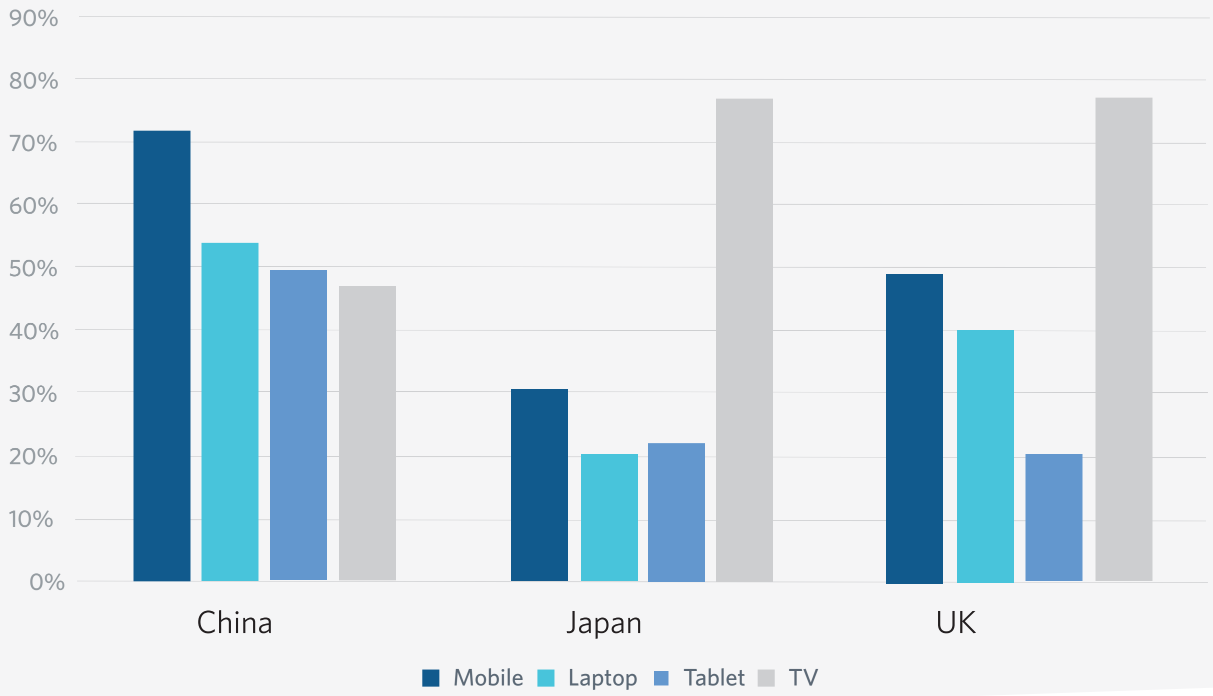
"The rapid development of technology has been forcing young people to think about their future and proactively take actions to seek positive changes for the world. BlueCurrent hopes to be a force for good – encouraging and promoting the understanding of the younger generation and leading the narrative of youth culture in China and key countries where we operate. China will soon host the world's biggest sporting event in Beijing, and this will be a stage for athletes from around the world to connect and engage with global sporting fans and young audiences in a new way."

Gen Z and Shifting Media Habits

MORE CONTENT, SNACKABLE VIEW

Across all three markets, Gen Z's content consumption is up since the start of the pandemic, with nearly 50% of respondents stating that they're consuming more content than at the start of the pandemic. The majority of that media consumption is happening on mobile devices and televisions.

Devices Used for Sports and Lifestyle Content Consumption



For sports in particular, 37% of China's Gen Z are watching more content, 36% in the UK and 21% in Japan. This compares to under 20% of Gen Z watching less sports-related content than before the pandemic.

"We continue to see content consumption behaviors that changed at the start of the pandemic have a long tail, two years after initial lockdowns," said Michael Rinaman, managing director of Asia Pacific for TRUE Global Intelligence. "Gen Z has seen their digital lives bonded to their smartphones and social media; even as their life stage progresses through secondary education and they enter the workforce, demand for lifestyle and sports content consumes a significant portion of their lives."

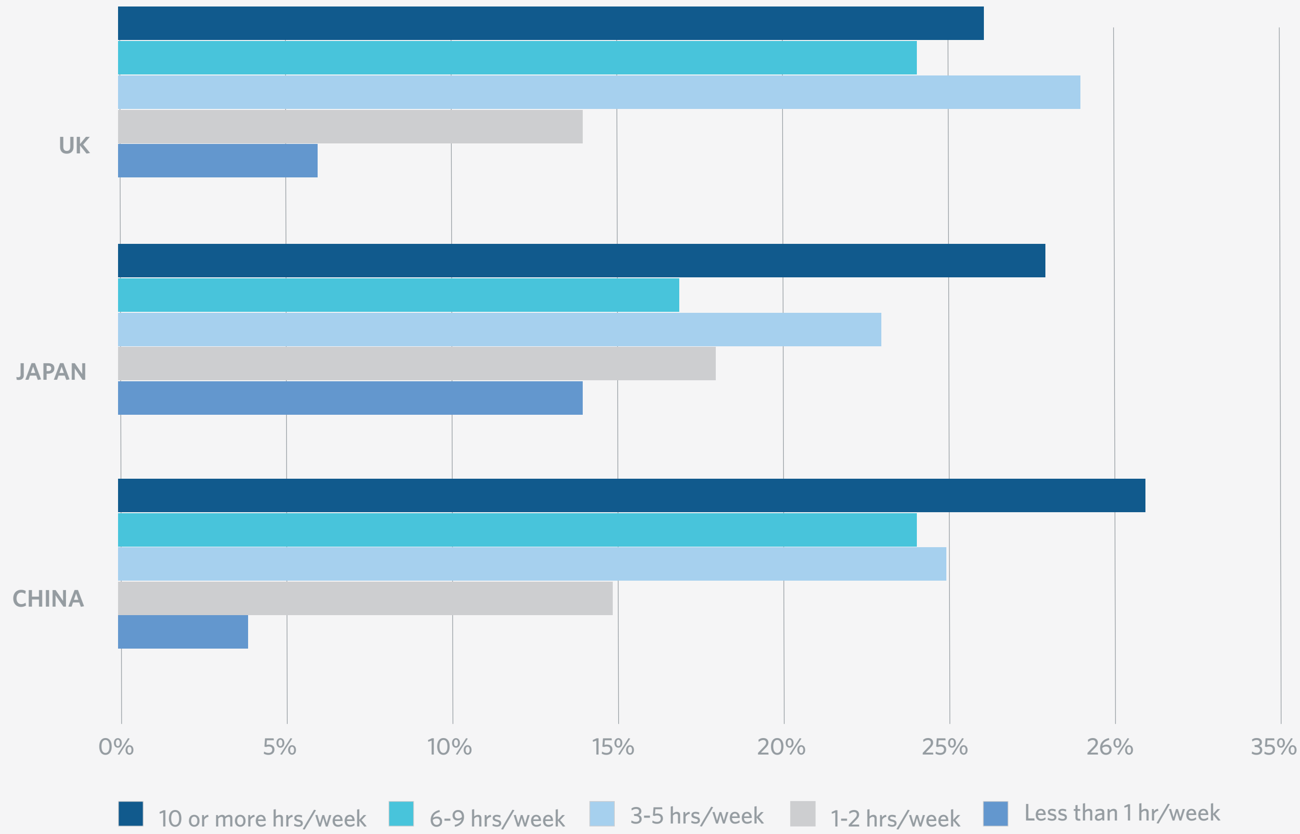
While viewership has gone up, the proliferation of channels serving up short video content has exploded among the generation.

Watching highlights is the most popular way to consume sports content on social media, ranking it #1 among viewing options across all three markets. These short, snackable, video-based clips are the perfect format in a feed-driven social environment. Gen Z is also heavily engaged, with between one-third and one-half across markets posting and reading comments about sports.

THE EXPLOSION OF TIKTOK/DOUYIN

The study also validates the rising engagement of Gen Z with TikTok (Douyin in China). As seen in the table below, the majority of users of the platform use it at least three hours a week, and nearly a third use the platform 10+ hours per week.

Hours Per Week Users Spent on TikTok/Douyin



With nearly two-thirds of Gen Z active on the platform in China and the UK, and nearly half of those in Japan, this represents a massive expenditure of time.

While Douyin in China has been effective at capitalizing on this attention to drive purchase interest (51% of those on Douyin have made purchases of products featured on the platform), this has not translated to other markets. In both the UK and Japan only 17% of users report making purchases of products seen on TikTok. In these markets, Instagram still holds an advantage with 39% in the UK and 27% in Japan purchasing something after seeing it on the platform.

Alison Hope, Director & Partner, BlueCurrent UK, says: "Gen Z have shown in recent years that they're not confined to the status quo and are open to new methods of discovery and purchase. As their lives have revolved around smartphone use, from work to social connectivity to play, it has seen a natural shift from just e-commerce to now also seeing social commerce play an increasingly influential role. Their social media networks allow them to have authentic connection with brands and social circles and they are provided a natural way of discovery on the platforms with the benefit of algorithmic discovery and reviews from personable sources they trust. With so much time spent on these platforms, it is no surprise to see them becoming a huge source of marketing influence as they play a role in Gen Z's openness to discover and purchase through new avenues."

BROADCAST AND TELEVISION STILL MAINTAINS AN IMPORTANT ROLE TODAY

Despite the explosion of social content among these digital natives, broadcast is still a cornerstone of sports viewing in every market. Nowhere is this more the case than in Japan, where 77% watch sports content on television, and 64% report viewing live broadcasts of sports content.

Yosuke Tanno, Managing Director of BlueCurrent Japan, noted: "We know Gen Z in the Japan market is constantly connected to their digital devices and consume entertainment there, so to see that the data showed so many still engage with content on television was surprising. Unpacking the data, we saw that television and broadcast was especially important for sporting events, allowing the opportunity to watch live and in a larger format."

In the UK, Sky and the BBC have a major influence on television viewing, with 60% reporting that they watch content on TV Network Channels.

Television is less pronounced in China, but still important. Half of Gen Z respondents (47%) consume content on their televisions, driven by TV Network Channel (51%) and video streaming service (49%) content for sports. For the Olympic Games, between 42% and 60% across markets rank having more streaming options available as important, and similar numbers noted they want the option to view the Games on multiple platforms.

Even with the rapid adoption of social-first viewing, broadcast plays an important role in sports consumption. The research shows that viewing on larger screens like televisions has evolved, though, with streaming services competing with live broadcasts and network shows to compete for a portion of all sports viewing.

Gen Z in China, Japan and the UK

THE NEW GENERATION DEFINES CHINA'S EVOLVING SPORTS TASTES: *OPTIMISM AND VALUE*

China has issued a national fitness plan that sets ambitious goals for the proportion of residents exercising regularly to reach 38.5% and the sports industry to be worth 5 trillion yuan ($773.6 billion) by 2025. The effects of this ambitious plan are clear among Gen Z; across all three markets, China's youth are the most likely to report being avid sports fans (55%), the most likely to follow the Olympic and Paralympic Games (42%), and on average, each individual spends about nine hours per week participating in sporting activities.

Gen Z in China also have the highest levels of frequent participation in sports, with 33% spending 10+ hours on sporting activities.

Basketball (36%) and eSports (32%) are the most frequently played among Gen Z in China, with several winter sports also beginning to attract youth in the market.

Ice Sports	**#1**
Skiing/Snowboarding	**#2**
Shooting Sports	**#3**
Hockey	**#4**

According to Zhao, "Since Beijing's successful bid to host the Winter Olympics, the number of participants in ice and snow sports has reached 346 million according to a report issued by the government this month, with young people between 18 and 30 years old accounting for 37% of the total population. This 'ski fever' has also turned into a new trend for social networking among the younger generation. Searches for 'skiing' on Xiao Hong Shu (Red) have heated up rapidly with the Games approaching, and the number of skiing-related content on the platform has also reportedly increased by 400% YOY."

Gaming remains popular as well; even with changing regulations on eSports, Gen Z in China still participates and follows gaming professionals in large volumes. Given frequent participation in sports and a massive following for athletes and gamers, it is no wonder that Gen Z in China is optimistic. 82% also state that the Beijing 2022 Winter Olympic Games will "give me a sense of pride for my country," and 75% state the Beijing Games "can connect people and communities around the world."

This sense of connectivity also comes through in youth values in China, as 50% of Gen Z strongly agrees that brands can support international events through donation of money to a local cause that aligns with brand values, topping all other ways that brands can contribute.

This is echoed in Gen Z value statements in the market:

- 88% agree that gender discrimination in sport needs to be addressed
- 83% state that diversity should be a priority for brands
- 81% agree that sports brands are very inclusive

A UK MARKET POISED FOR CHANGE

For the UK, in contrast to the China and Japan markets, the research showcases a country and generation on the precipice of substantial change, from the sports that dominate the culture to sport as lifestyle rather than competition, and social media commerce.

While the top football leagues remain king, American sports and leagues have gained a foothold in the market with a consistent focus on opening new markets to expand their fandom.

Percentage of UK Gen Z Who Actively Follow Sports Leagues

FIFA World Cup	45%
English Premier League	39%
UEFA European Championships	32%
UEFA Champions League	30%
The Olympic & Paralympic Games	29%
La Liga	13%
Rugby World Cup	12%
National Basketball Association (NBA)	10%
National Football League (NFL)	10%
Bundesliga	10%
EFL	9%
Serie A	8%
T20 World Cup	8%
Rugby League World Cup	8%
Liga 1	7%
IPL (Cricket)	7%
Premiership Rugby	5%
T20 Blast (Cricket)	5%
ODI World Cup	55
Major League Baseball (MLB)	4%
Heineken Champions Cup (Rugby)	4%
County Championship (Cricket)	3%

Likewise, while there is still a culture of sports competition and rivalry, a change towards sports as a point of lifestyle identification is afoot. Gen Z – the fan of the future – is becoming increasingly less concerned about the competition element of sport and instead viewing sport like any other lifestyle pursuit: as a form of entertainment and a vehicle for exciting, unpredictable content.

While this trend has fully taken hold in China with more people engaging with highlights (50%) or athletes' performances (48%) over focusing on the score or their favourite team or player, this trend is only emerging in the UK, where 41% still engage in the competition and the score while 45% engage because their favorite team is playing.

Social media commerce is also set to increase in the UK, with 41% of Gen Z not yet using social media to make purchases. With the ever-increasing influence of TikTok and Instagram, that looks to be changing.

Among Gen Z, 39% use Instagram for purchases, 21% use Facebook and 17% use TikTok, suggesting further growth of social commerce is ahead as new platforms continue to penetrate the market more deeply.

A BALANCE OF DEMANDS FOR THE TRADITIONAL AND THE PERSONALIZATION IN JAPAN

Online survey responses from 1,000 Gen Z respondents in Japan presented a market starkly different to China and the UK.

Media consumption in Japan is the highest for television (67% watch daily) and lowest for social media (36% rarely or never use social). While social media usage is lower, LINE still holds a highly trusted position in the market (78% trust the platform for news), outpacing trust in television (76%).

“In Japan, LINE is a sort of ‘lifeline infrastructure.’ Not only does it support connection with friends, but also with family, teachers and colleagues; we use LINE in all our social circles to communicate. During the COVID situation, government also used and still uses LINE for the booking of vaccinations,” Tanno noted.

“Across the globe today, most countries have similar apps that offer this level of connectivity and service, but LINE was one of the first services which allowed people to make a phone call to others and to include a STAMP which can show their own feelings and emotions, making it indispensable in Japan.”

As it relates to brands, Gen Z’s demands in Japan are split between knowing the brand produces quality goods and services (50% agree that they are willing to pay more for quality, the highest of any market), and that it is developing the next best thing (66%).

When determining brands to purchase from, Gen Z still gets the majority of information from friends and family (55%), but also reads online reviews (45%) and blogs (19%), showcasing the power that trusted reviewers can have on brands.

Similarly, Gen Z in Japan trust recognizable figures like athletes (63%) and celebrities (63%). Celebrities are also the most followed lifestyle accounts on social, further cementing the need for brands to work with partners who are authentic and transparent to their core values.

Reflecting on the 2020 Tokyo Summer Olympic Games, Japan’s Gen Z audience remembers being highly engaged, with 81% watching the Games in some fashion. Here too, television dominated viewing, with 60% watching live in real-time.

Heading into the 2022 Winter Games, the market’s youth is still engaged with the Olympic movement, with nearly half planning to watch the competition (46%) and nearly an equal amount (45%) watching sports they’ve never played.

Looking Forward to The 2022 Beijing Olympic Games

EXPECTATIONS FROM ATHLETES AND BRANDS: VALUES AND SPORTS ARE CLOSELY INTERTWINED

Across all markets, Gen Z has strong demands of brands, sports and culture more generally related to their values. For athletes, youth audiences support them in speaking about issues they have faced and being authentic and transparent with the public.

Importance of Athlete Issues for Gen Z

	CHINA	UK	JAPAN
ATHLETES TAKING A STAND AGAINST CYBERBULLYING	76%	67%	64%
ATHLETES DISCUSSING MENTAL HEALTH	68%	72%	53%
ATHLETES/INFLUENCERS PROMOTING PARTICIPATION IN SPORTS	56%	50%	42%
ATHLETES SPEAKING OUT ON A POLITICAL OR CULTURAL-RELATED TOPIC	56%	49%	40%
ATHLETES/INFLUENCERS BEING AUTHENTIC AND TRANSPARENT	53%	59%	58%

Similarly, there is an expectation that sporting organizations and brands supporting them provide similar support for their values. Representation is key here, as Gen Z sets expectations for inclusivity, representation and diversity.

Agreement with Values Statements by Gen Z

	CHINA	UK	JAPAN
GENDER DISCRIMINATION NEEDS TO BE ADDRESSED	88%	78%	74%
CAMPAIGNS SHOULD BE INCLUSIVE OF ALL GENDERS AND IDENTITIES	84%	79%	63%
DIVERSITY SHOULD BE A PRIORITY FOR BRANDS	83%	78%	64%
IT'S IMPORTANT FOR ALL TYPES OF CONSUMERS TO SEE THEMSELVES REPRESENTED IN CAMPAIGNS	81%	78%	55%
SPORTS BRANDS ARE VERY INCLUSIVE	81%	62%	56%
THE MEDIA CAN DISCREDIT NARRATIVES THAT FUEL RACIAL BIAS AND VIOLENCE	81%	72%	58%
CAMPAIGNS SHOULD BE INCLUSIVE OF PEOPLE FROM ALL SOCIO-ECONOMIC BACKGROUNDS	80%	75%	61%
THE MAINSTREAM MEDIA IS RESPONSIBLE FOR PUBLISHING NARRATIVES THAT FUEL RACIAL BIAS AND VIOLENCE	80%	73%	60%
I WILL PURCHASE FROM BRANDS THAT VALUE DIVERSITY (I.E., WORKFORCE, ADVERTISING)	79%	76%	62%
I WILL LOOK INTO HOW A COMPANY BEHAVES WHEN RESPONDING TO ISSUES OF RACIAL INEQUALITY WHEN CONSIDERING WHETHER TO BUY THEIR PRODUCT	75%	66%	47%
BRANDS NEED TO REPRESENT ALL TYPES OF GROUPS	73%	81%	59%
GENDER WAGE-GAP SHOULD BE A PRIORITY FOR BRANDS	68%	72%	58%
LGBTQ ISSUES SHOULD BE A PRIORITY FOR BRANDS	62%	65%	58%
MORE ATHLETES ARE BEING DISCRIMINATED AGAINST THAN EVER BEFORE	57%	63%	58%

Rinaman noted, “Across all of the markets where we conducted research, Gen Z confirmed a preference for brands and organizations that look and think like they do. Diversity, gender equality and inclusivity are bare minimum to have successful conversations with these young people, and this is especially true as it relates to their lifestyles and sporting interests.”

LOOKING AHEAD TO THE BEIJING 2022 WINTER OLYMPICS AND PARALYMPIC GAMES

With only a few days before the Beijing Organizing Committee officially marks the start of the Games, one thing in the research is clear: Gen Z is ready to view the Games in their unique way. Roughly 50% of Gen Z in the UK and Japan plan to watch the Olympic Games, while that number soars to 78% in China.

In China, there is an added level of pride. 82% of Gen Z agree that “Beijing 2022 will give me a sense of pride for my country,” with similar numbers noting there will be a moment of national unity as 82% believe the Games will bring people across China together.

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