

Generation Z: The Lasting Influence of the Digital Native on Marketing

Generational market segmentation has traditionally been employed by marketers as a means to predict behavior and identify methods to advertise to age-based cohorts. The very term ‘generational’ is an indicator of an expectation that such behaviors would reflect an age group that spans at least 20 years, as the previous generations had (Greatest Generation, Baby Boomer, Gen X, and Millennial). The author hypothesizes that Generation Z, the newest group born in the years ranging from the mid or late 1990’s, operates at a faster pace due to its use of technology. The impact of this digitally native demographic will be far-reaching and holds the potential to compress generational trend timeframes to a matter of years rather than decades.

This thesis analyzes how several factors have shaped the worldview of a generation, but that technology and the role that it plays in their digital lives has created a sea change in marketing. The author examines Generation Z through a variety of lenses: the trends that have shaped them, the causes they care about, and the way they use technology to communicate. The resulting influence that Generation Z has on all aspects of marketing is potentially game changing, as marketers have already had to realign investments from traditional to over the top media viewership, social media storytelling, and transparency in corporate governance. Examples include key marketing trends evident in the ratings of network television versus viewership of digital streaming channels, and the movement away from formulaic advertising models to content creation, which is designed to affiliate rather than to sell as well as new requirements to report on environmental impact.

Who is Gen Z? Marketers segment demographic groups by generations in 10-20 year groups as a means to identify macro trend behaviors that are driven by influences of the time. Such examples include The Greatest Generation (1928-1946), was influenced by the great depression and WW2, resulting in strong morals and thrifty purchasing behavior. Their children, Baby Boomers (1936 - 1964), were the builders of the American dream and their post-war consumerism created a shift to suburbs. Generation X (1965- 1980) are the parents of Generation Z and defined the term 'latch key kids' due to working parents, and later became independent entrepreneurs. Millennials (1981 – 1997) are also known as 'Gen Me' and have been called the most self-absorbed generation, and are the older siblings of Generation Z.

Generation Z is the segment of the population who were born after 1998 to present, and are now entering college. In many ways, they are best defined by what came before them. They were born into the great recession, the war on terror, and the war on climate change. They are more cautious and conservative, with a strong awareness of safety and security. They are savers, non-drinkers, non-smokers and life hackers who want to make the world a better place. In many ways, Generation Z is the extreme opposite of Millennials because they look outward, and consequently, marketers are scrambling to attract and retain this important cohort. Most importantly, this is a generation who is digitally native and technologically intuitive. Given the speed of technology and its impact on compressing culture, the 15-year generational cycle is expected to compress into a few years, months or even the interval between iPhone launches. As such, due to the pace of change in technology, Generation Z may be the final generational cohort that marketers can segment.

Currently, Generation Z accounts for just over one-quarter of the population of America. According to the 2012 US Census Bureau (US Census), there are more than 171 million babies

born into the US every day, and with each birth, the size of Generation Z is growing. As digital natives, they are the keepers of the technology keys and help their digital adopter parents or grandparents make purchase decisions of major household purchases, even large ticket items such as cars and vacations, something that would have been unheard of in any previous generation, influence vacation destinations. As a result, marketers are now advertising automobiles that are selected by children due to the entertainment package and creating hotel fantasy suites designed to attract the children in the family. However, it is important to note that Gen Z is not entitled. They want to work from an early age and are destined to make a difference. According to trend spotting agency J Walter Thompson, 26% of 16 to 19-year-olds are actively volunteering in their communities (JWT Intelligence).

Gen Z developed their personalities and life skills in a socio-economic environment marked by chaos, uncertainty, volatility, and complexity. Entertainment was driven by themes of extreme survival as demonstrated by best-selling book series and movie blockbusters *The Hunger Games* and *Divergent* which each depicts teens being slaughtered. However, also embedded in these story lines are themes of resourcefulness and coping mechanisms which helped the hero/heroine adapt to a series of impromptu life and death challenges. In many ways, Katniss Evergreen of *The Hunger Games* series is the poster child for Gen Z resilience. And like the team players in the movie, the children of Gen Z were raised in an American education system that focused on teambuilding, mainstreaming and classroom diversity. This is markedly different from Millennial's who were chastised for receiving participation trophies. In fact, Gen Z is driven to achieve. As a result, they are collaborative team players where everyone is equal at winning and losing. This is an important foundational component of the power of crowdsourcing in marketing.

Gen Z is also highly outer-directed and concerned for others. It's this inclusiveness that fuels Generation Z and is reflected in the causes and issues they care about. Generation Z is engaged and passionate about making a difference in the world, and they are doing something about it. They are aware that American children are living in poverty, and have seen their parents struggle with employment during the great recession, or at the very least have witnessed downsizing or job loss and the difficulty that their older Millennial siblings have experienced in gaining employment. As such, finances are a major concern and a key reason why many indicate a desire to become entrepreneurs so that they can be in control of their destiny and their income. The Gen Z cohort has been raised in larger, extended households as retired grandparents have moved in and Millennial siblings have moved back home. As a result, they are sharers and have greater affinity and respect for the elderly. Gen Z shares many of the same values as the Great Generation – especially work ethic. The resulting attitude is that traditional methods do not always work, and innovative solutions are necessary to succeed (Williams).

Generation Z has been shaped by a demographic trend of blended families where multi-generations live in the same household. A hallmark of this group is that they are significantly more diverse and inclusive, and not only respectful but truly celebrate the differences among them. The complexion of Gen Z is also different from other segments due to demographic changes resulting in rapid growth of multiracial children. More than a 400% increase in multiracial marriages (Black and White) in the last 30 years and a 1,000% increase in Asian-White marriages have resulted in a 50% increase in the multiracial youth population since 2000 to 4.2 million. Long-standing views of race have been challenged by culture: celebrities, artists, politicians and athletes of mixed heritage have changed discourse, along with trans-racial and international adoptions. (Census: “The two or more races population: 2010 Census Brief”).

Gender roles and traditional self-identifications are becoming blurred and are much more accepted by this group (Laughlin). Marketers have responded by breaking down barriers at breakneck speed - examples include the now famous Cheerios spot which showed a blended family, the elimination of gender-specific toy aisles by retailer Target, the growth of STEM marketing to girls with Goldie Blox, and the public transition from Olympic athlete Bruce Jenner to Kaitlyn Jenner in the national media which led to significant media coverage and awards. The impact for marketers is that advertising is no longer a white bread world.

Consumers want to see a blended society devoid of stereotypes and in authentic, relatable situations (Laughlin). Gen Z is highly aware of multiculturalism and also microaggression. As such, they seek authenticity in communications. Marketers must go deeper and have a real understanding of issues. Two polar opposite examples are recent advertising work by Pepsi and Heineken. In the case of Pepsi, a commercial which was meant to reflect the brand's understanding of cultural change backfired when it was viewed as tone-deaf. Backlash from Gen Z on the internet forced the marketer to pull the ad within 24 hours of its launch. By contrast, Heineken's social experiment ad which launched on the internet featured real people with opposing views who discovered that they had more in common than a stereotype. This creative execution was widely lauded as a success and received millions of global shared views.

One of the most significant impacts on marketing are the cause-related passions of Generation Z. They are hyper-aware and concerned about man's impact on the planet and seek to understand the social responsibility of companies with which they do business. The result is that marketers are now facing a consumer group who is interested in a higher level of accountability and transparency when considering whether to purchase a product. This interest does not end in the supply chain and how materials were sourced but also include the investment

strategy that a company may employ. Change.org is an example of an effective means that Generation Z has used to call for major change in Fortune 500 companies in the way they hire, source products, report on carbon footprints and invest/divest in fossil fuels. Generation Z, and its significant buying power and use of technology, has leveraged social responsibility values in ways that have forced marketers and corporations to be more transparent and conscientious of every aspect of their supply chain including marketing messages. Sixty percent of Gen Z'ers want their jobs to have an impact on the world, and 80% will more often buy a product that has a social or environmental impact. Not only does Gen Z expect brands to have an impact, they expect them to show it (Nielsen Green Generation). Cause related marketing has demonstrated significant success with Gen Z in terms of creating affinity with a brand but also generating sales and loyalty. Clothing manufacturer Patagonia announced a day of giving on Black Friday, 2016 which resulted in record online sales for the brand. Typically reserved as the kickoff of holiday consumerism, Patagonia announced that they would “donate 100 percent of global Black Friday sales in stores and on the website to grassroots organizations working in local communities to protect our air, water and soil for future generations.” In addition, the brand donates 1% of daily sales to causes which to date amount to nearly \$80 million (Marcario).

When examining the role of technology in the lives of Gen Z, it would be foolish to assume that it is just for entertainment purposes only as that is indicative of the usage patterns of the digital adopters who came before them. Education author Marc Prensky coined the phrase “Digital natives” given that this is the first generation born into a digital world, and everyone before them were simply digital immigrants who adapted to technology. According to Prensky, the distinction between digital natives and digital immigrants is important because “it is more cultural than technology-knowledge-based. ‘Digital Immigrants’ grew up in a non-digital, pre-

Internet culture before they experienced the digital one. ‘Digital Natives’ know only the digital culture.” (Prensky). For Gen Z, digital life is just that – a way of living and connecting with the world. It’s an essential means for them to create and maintain friendships, which may be local or even global. Video games are an important method for Gen Z to form friendships, and many may never have physically met the friends they have played with for years online. According to a Pew Study research report, “more than half of teens have made new friends online, and a third of them (36%) say they met their new friend or friends while playing video games...Playing games can have the effect of reinforcing a sense of friendship and connectedness.” (Lenhart Pew Research Study).

Digital life also extends into the social media channels, which have experienced explosive growth in the past ten years, leaving marketers frustrated to understand this rapidly evolving and changing medium. What started as simple reflections of mood status or snapshots of pictures to share, has now evolved to reflect a personal brand as Gen Z promotes new discoveries as social currency with their friends. Such behavior can catapult a brand to become an overnight success as it did with eyeglass manufacturer Warby Parker (Silva) because the user experience is customized and personalized for the user, which Gen Z highly values. Anything new is immediately shared, and the sharer gets the credit for the discovery. Core social media channels include FaceBook, Instagram, Snap Chat and Twitter – although trends show that Facebook and Twitter are declining as new disposable story applications have been introduced to Instagram and SnapChat. It seems that just as soon as a marketer discovers a way to connect with Gen Z on a social media channel, they have just as quickly migrated to the next new thing. Over 52% of teens use YouTube or other Social Media sites for a typical research assignment in school (Pew Research). They multi-task across multiple screens, often having as many as five

screens open at a time (TV, Cell/mobile phone, Laptop computer, Desktop computer, iPod or other portable music player, Gaming console, Handheld gaming device). This constant visual stimulation may be in part a reason why attention spans are getting shorter. The average attention span is down from 12 seconds to just 8 seconds, as Generation Z can process information much faster. (Huffington Post) which has huge implications for marketers as not only do they have to break through the clutter but they also have a shorter amount of time to communicate their message, influence behavior or make a sale. The issue of attention span has caused marketers to shift away from lengthy copy and instead deliver dynamic, interactive or high-quality graphics to capture attention. Brands that want to create interest around an issue need to incite curiosity and provide bite-sized, shareable summaries of need-to-know information. Even emojis have been introduced into some marketing messages, although that can backfire if too forced and perceived as inauthentic.

How does Gen Z use technology to communicate? This is possibly what Gen Z is most adept at. As digital natives, they have always known how to swipe and their capabilities to access the latest and greatest techniques and apply it to daily life. They have grown up with hi-def, surround-sound, 3D and now 4D, with 360-degree photography and film is their normal. Ultra slow motion and hi-speed video is their standard. Long gone is the day when 'home made movies' would be poorly produced. Instead, they are slick and complex films designed to tell a story – all in the palm of their hand. In reviewing content, Gen Z live-streams media such as Twitch and Ustream. Two-way live-streaming and video-conferences such as FaceTime and Skype are their preferred ways to communicate – when they must speak 'live.' However, most often they text using their smartphone, or an app such as SnapChat or Slack.

As Social Media natives, attuned to NSA surveillance issues, they are concerned with privacy and drawn to incognito media applications that have the capability to self-destruct or enables them to control how long the content is available (Taylor). This has proven challenging to marketers who attempt to connect with Gen Z via social media, as these consumers have made it clear that marketing is not allowed in their space. If you were asked to name the platform that occupies the most of Gen Z's time, you might guess Snapchat. You almost certainly wouldn't guess Facebook, which has a reputation for attracting older folks more than teens. But while Snapchat is the most-used platform for 51 percent of Gen Z, all the talk about teens and tweens shunning Facebook is largely a myth. In reaction to suffering sizable losses of the core 13-17 year old demographic due largely to the inability to remove posts from a timeline, Facebook as evolved to new features that mimic competitors, Snapchat and Instagram with its new Facebook Live, which has boosted engagement with Gen Z. It will be interesting to see what happens as more Gen Zers become interested in current events and news. But for now, it looks like social media is a major news source for these individuals. As a result, local and national sources may have moved to provide short news videos and stories on social media sites, such as Twitter's Moments feature or Snapchat's Stories feature, in order to better engage with this younger audience.

When it comes to content creation, not all of it is in the control of marketers. In fact, user generated content or UGC can be a strong method to generate affinity but there is a catch – the brand has nothing to do with it, and it may not always be flattering. One example of this is the recent trend towards integrating UGC into social media strategy such as Coke's #ShareACoke campaign which encouraged users to post a selfie of their Coke consumption, or Charmin's campaign which asks users to share potty humor as a means to engage consumers. These tactics

appear to be effective, with a 79% increase in click through rates according to email marketer, Vertical Response (Humphrey). Another recent trend of using digital technology to encourage engagement is content created recording 'Let's Plays' for YouTube, and live-streaming gaming to an audience via platforms like Twitch. While the brands themselves have little to do with these, they have the power to either support and encourage the activity or become intrusive or heavy-handed and try to stop it. A survey conducted last year by digital agency Deep Focus found that 63 percent of Gen Z prefers to see "real" people in ads, while just 37 percent favor celebrities. And close to 70 percent are more interested in content with a "realistic ending" rather than a polished but unlikely narrative. Marketers are enlisting the help of social influencers, effectively putting a buffer between the marketing message and the brand (Speaks).

Gen Z also is known to love the ephemeral and rarity, and is drawn to social media that disintegrates and self-destructs. Social media is so much a part of their lives that Gen Z is said to suffer from FOMO (fear of missing out), so being culturally connected and connected to their devices is critical. Gen Z are agile communicators: speed of communication and repartee garners cultural currency. They're accustomed to rapid-fire banter and commentary. But Gen Z also connects to something completely different: the offbeat and raw. According to market research firm Touchstone, Gen Z has a "weird, unhinged sensibility to it" (Burch). The media figures they look up to—people like Pewdiepie and Jerome Jarre—are embraced more for their absurdist humor than for clever witticisms. The content they share tends to mirror this as well: self-deprecating Snapchats and memes centered around making people believe the sender is offbeat or quirky. This is not a Millennial behavior; it's rare for a 20-something to post anything on social that makes them look strange. But for a generation that's spent their entire lives online—

mostly in the unfiltered lens of Skype, webcams, live streams and vlogs—an intimate exhibitionism has emerged in a way that older generations simply don't have (FastCompany).

Gen Z is not loyal to any network or channel. Instead, they are distinctively platform and screen-agnostic. They have grown up in an on-demand world, so they can watch what they want when they want it the total daytime broadcast viewing had declined an average of 24 percent. They seek content, and are known to 'binge watch' entire seasons of shows in one sitting. Gen Zers stream their TV and videos just as much as they watch television live (or maybe DVR) each day. Over half spend more than 1 hour per day streaming TV/videos while 52% spend more than 1 hour per day watching TV. Compare this to the 60% of Millennials who spend more than 1 hour per day watching television (Netflix Effect Research Gate). Then there's YouTube, which attracts a huge number of Gen Z viewers each day. Over the top (OOT) Streaming devices such as Roku, Chromecast, Apple TV, etc. also have realized significant growth due to Gen Z so that users can access channels on demand without having to pay a subscription for cable. Due to the shifting preference of having everything "on demand," and choosing exactly when and what they want to watch, Gen Z has influenced a change in the way cable companies package their services, resulting in the "unbundling" of cable packages in order to better compete with streaming services (Research Gate).

The inability to track multi-device and out-of-home viewing have also impacted networks. While Nielsen has offered portable people meters to track mobile and online viewership, nontraditional viewers, for the most part, fall through the cracks. As a result, networks are now finding themselves vulnerable to competition from streaming services like Netflix and Hulu – and also finding it more difficult to quantify ratings to advertisers.

Consequently, advertisers are exploring other options beyond traditional media to reach this elusive target.

In an effort to provide some sort of advertising within digital content, another new marketing approach that has developed as an outgrowth of the Gen Z influence - the hero, hub and hygiene approach to content management as created by YouTube (Beusekom). Hero videos are large-scale events or programs that drive mass awareness – often around product or event launches. Hero content builds awareness at a much broader scale to reach the mainstream. According to YouTube, Hero content is something that's done on average 1-2 times a year for a brand and will still entertain and inspire the viewers with emotional storytelling. An iconic example of Hero Content would be Red Bull's Project, Stratos. Dubbed by the AdAge as the biggest digital event of 2013, Red Bull's Project Stratos drew worldwide attention for sending Felix Baumgartner to the edge of space, where he then jumped from his hot air balloon and set the world record for the highest free-fall jump. The event was live streamed, and the video of Baumgartner's record-setting jump has over 36,000,000 views and drove thousands of new subscribers in just over a year (Zmuda). Hub videos are meant to entertain and keep an audience coming back. According to YouTube, this content should be "regularly updated," "valuable and engaging," and should incentivize people to "subscribe – like – follow." Hygiene videos are created around the core interests relevant to the ideal viewer or target consumer. Often this content is specifically created to capture viewers searching key terms related to the brand. Looking at Red Bull's channel through the lens of YouTube's Hero, Hub, Hygiene framework, an example's of Red Bull's hub videos are the behind the scenes and training videos leading up to the official Project Stratos jump. People tend to find hygiene videos through a search when they're looking for answers to a specific question.

Generation Z is also changing the rules when it comes to radio. Overall, Gen Z spends more time streaming music. Pandora and Spotify are top players when it comes to streaming music. Gen Zer's are 33% more likely than Millennials to listen to Spotify more than 5 hours a week. However, when it comes to streaming music on Pandora, both groups behave similarly: 12% of Gen Zers listen to Pandora more than 5 hours a week compared to 13% of Millennials. About 21% of Gen Z consumers pay for their music streaming, while roughly 56% listen to free services, which is in line with Millennials' behaviors. Since the majority of each generation are listening to free streaming versions, they are hearing numerous advertisements throughout the week. This may be a good advertising option for companies trying to reach these younger consumers (Dixon).

The next technology to consume Gen Z, however, will be virtual reality. According to a study conducted by Greenlight VR and online research firm Touchstone Research, 79 percent of U.S. Internet users 10 to 18 are interested in VR—six percentage points more than Millennials (Touchstone Research Study). At the moment, the VR market is still ramping up. Oculus Rift—the flagship VR headset from Facebook-owned Oculus—was only released in March of this year, while the HTC Vive came out in April. Samsung's Gear VR has been available since November, but Sony's PlayStation VR won't launch until this October, and next up is Microsoft HoloLens, which promises an augmented reality (Burch). Still, by this past January, Google had shipped upwards of 5 million units of its inexpensive Google Cardboard headset to help build the hype. Brands that routinely target Gen Z, like Gillette and McDonald's, are investing in VR experiences already, but another course of action for companies is to offer branded Google Cardboard headsets along with their custom VR experience. Touchstone Research and

Greenlight VR's findings show that, so far, consumers are responding favorably to this approach (Burch).

Generation Z, may prove to be the last group that marketers are able to segment over a generation but they may also wield the greatest impact of all time on marketing and consumerism. The technology that they employ enables them to be empowered decision makers and influencers. As such, they can make their demands known and hold marketers, brands, and entire industries accountable for how they conduct business, treat the environment or provide access to content. Further, technology itself is enabling new ways to target with amazing accuracy via big data, personal devices that act a homing beacons, and machine learning. Content will be so personalized that the need for generational assumptions will be obsolete. While the pace of change is unprecedented, one thing is certain – Generation Z and its use of technology has changed everything.

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