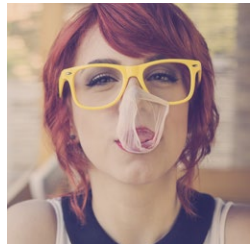


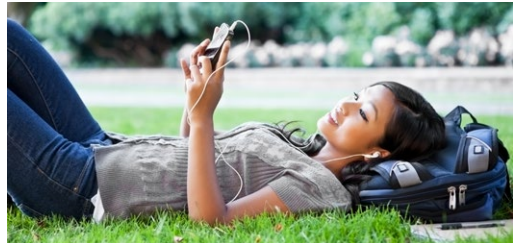
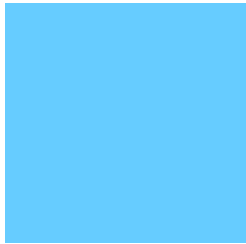
iGEN TECH DISRUPTION



2016 National
Study on
Technology
and the
Generation
after Millennials



By
The Center for
Generational Kinetics
And Jason Dorsey



THE CENTER FOR
GENERATIONAL KINETICS®

JASON DORSEY

“The generation after Millennials, known as iGen, Gen Z and Centennials, will determine how every other generation ultimately uses technology.

This new generation, with no recall of 9/11 or a time before the Internet and mobile devices, is becoming the digital shepherd of a new era in technology adoption and reliance.

We call this new generation, iGen. They are not only the best preview of future generations but also reveal the behaviors older generations will eventually adopt when it comes to technology.

Much as Millennials changed every other generation’s dependence on social media, text messaging and digital downloading, iGen will do the same for wearable devices and dependence on the cloud for storage and computing.

Furthermore, their acceptance and usage of technology is likely to be more similar to that of peers in distant countries than grandparents in their own country.

What this means to every other generation remains to be seen, but what it means to those interested in generational change is that iGen has assumed the Millennials’ mantle of the generation to know, understand and engage.”

- Jason Dorsey,
iGen Expert and Chief Strategy Officer
The Center for Generational Kinetics





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MEET THE GENERATION AFTER MILLENNIALS:

iGEN

Currently age 20 and under, this new generation goes by many names: iGen, Gen Z, Centennials, Founders and more.

While we prefer the term iGen, as it works well with the “i-everything” environment in which iGen emerged, the undisputed fact is that this generation is soon to be the fastest-growing generation in the workforce. They are already the super-majority generation in college and younger and the tastemakers of trends that affect all of us, especially when it comes to technology.

iGen’s role and relationship with technology—from attitudes toward technology to true dependence on it—provides the best snapshot we have of future technology usage for each of us.

The generations before iGen, including Millennials, Generation X and Baby Boomers, will eventually adopt many of the technology habits and attitudes that iGen already views as normal. **This happens because, as we have uncovered, technology trends now ripple up: from the youngest adults to the oldest.**

Many people saw this firsthand as Millennials’ reliance on social media, text messaging and mobile communications led other generations to adopt the same usage. Now employers, marketers and even policymakers are leveraging these technologies to better engage multiple generations at the same time.

Looking ahead, iGen also represents the best preview of future attitudes, beliefs and expectations about technology in the areas of privacy, security, dating, education, trust, work and so much more.

The Center for Generational Kinetics led this national study on iGen and technology to uncover what every generation of leaders, parents, managers, marketers and policymakers needs to know now—before the new generation fully exerts its change on the rest of us. iGen Tech Disruption is part of our 2016 Landmark Study Series on the Generation after Millennials, findings from which will be released throughout the year.



Looking ahead, iGen also provides us the best preview of future attitudes, beliefs and expectations about technology in the areas of privacy, security, dating, education, trust, work and so much more.

MEET THE GENERATION AFTER MILLENNIALS:

iGEN

This head start in understanding is absolutely critical to preparing for, communicating with and influencing this new generation at a critical time in the reinvention of work, commerce and global connectivity.

Stay tuned for the next report in the **2016 Landmark Study Series on the Generation after Millennials...** there is much more to come!

The leaders who identify the challenge that iGen brings, along with the opportunity within that challenge, will be well positioned to understand and unlock the power of an entirely new generation before their competition does.

Please contact The Center to learn how we can solve your iGen challenge through research, strategy and solutions that drive measurable results for you.

Jason Dorsey
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[Click here](#) to watch the acclaimed TEDx video about the generation after Millennials.



HOW YOUNG IS TOO YOUNG FOR A SMARTPHONE?

Smartphones are the gateway to communication, learning, influence and even growing up! But what is the “right” age to get your first smartphone? This decision has never been more important, as a smartphone allows you to do nearly anything: connect with your peers, work on homework online, play video games, use social media, search for information online and have access to a world of good and bad influences, as well as the latest entertainment.

“The age at which you get your first smartphone is more important than the age at which you get your driver’s license.”

- Jason Dorsey

So how young is too young for getting your first smartphone? In our national study, we found out that the answer depends entirely on YOUR generation.

What we uncovered shows adults’ natural resistance to giving too much power and freedom to youth, along with young people’s belief that they not only can handle a smartphone, but that their life experience may depend on it more than ever before.

This is true to iGen, because once you get into high school, so much of the social chatter is digital chatter. It’s no longer just about Mom or Dad expecting you to answer their calls—since if they’re Millennials or Gen X parents they’re probably texting you instead of calling anyway. Smartphones have also become central to the ability to socialize at all. After all, who talks on phones anymore?

Having your own smartphone is not simply a status symbol either in the way it was for many Millennials. The price of basic smartphones has dropped tremendously and affordability has increased through options such as leasing the phone, replacing voice minutes and the availability of more non-voice options, such as texting, surfing the Internet and messaging apps.

Combine this new reality of dependence on smartphones and it’s clear to see that getting your first smartphone truly is a game changer, socially and otherwise for iGen. So what is the right age in terms of maturity, responsibility, digital freedom and more to have access to the world in your pocket?

In our national study of all four generations, iGen said that you should receive your first smartphone at an earlier age than any previous generation.



HOW YOUNG IS TOO YOUNG FOR A SMARTPHONE?

In fact, 18% of iGen said you should receive your first smartphone at age 13! That means they believe you should have your first smartphone while you are still in middle school or junior high. What does this expectation mean for social pressure, cyber bullying and parents trying to filter what their kids see or don't see? That remains to be seen.

Going further into the data, we found that iGen is four times more likely to say that you should receive your first smartphone at age 13 than the average of the other generations. In fact, the data shows that Millennials, Gen X and Boomers on average think you should receive your first smartphone at age 18!

WHAT IS THE APPROPRIATE AGE TO HAVE YOUR FIRST SMARTPHONE?



How different are Millennials from iGen on this key digital marker of adolescence? Twenty-six percent of Millennials think you should receive your first smartphone at age 18, whereas only 6% of iGen think you should receive your first smartphone at this same age.

Looking at the data, it appears that Millennials, the first truly tech-dependent generation, are starting to view technology more in line with the way their parents do. That is a shocking finding—almost as shocking as so many members of iGen thinking you should get your first smartphone at age 13.

Will this Millennial attitude toward technology continue with them looking more and more like their Baby Boomer parents in terms of providing technology to their kids? That remains to be seen, but we think it is likely given that Millennials are having kids at an older age than previous generations. That means the 13-year-old will likely be asking for a smartphone—or the newest device—when her Millennial parents are age 40 or potentially older.

On the flip side of trendsetting, if iGen thinks they should have smartphones at a younger age than any previous generation, does this mean they will become trendsetters at an even earlier age, too? If so, they'll have more years of experience with mobile technology by the time they reach age 18 than any previous generation, which gives them more opportunity to become dependent on the technology, affect other generations and become less likely to go back to earlier methods of communicating such as email or snail mail.

HOW YOUNG IS TOO YOUNG FOR A SMARTPHONE?

Young people today have come of age seeing their parents—who are Millennials and Generation X—glued to their own smart devices while eating, driving, working and even running. Kids see this behavior modeled by their parents and they want to replicate it because “that’s what adults do” and because they want to foster a sense of connection with adults. If an adult is always glued to a smartphone, the kid can figure out that sending a text message or WhatsApp message can get a faster response from Mom or Dad than actually trying to talk to them—even if they’re all in the same house at the same time.

Additionally, the younger you are when you want a smartphone, the more disconnected you can become from the cost of obtaining that smartphone. A 13-year-old can be quite disconnected from the amount of work or money required to buy and maintain a phone. This disconnect makes having a smartphone at

age 13 seem even more normal if the work or responsibility that goes into earning a phone is absent and there is only an expectation or sense of entitlement that they deserve a phone because their friends and parents have one.

The same idea holds true when considering other realities facing iGen. Having a phone at least allows you to see what others are saying and gives you the option of responding, but it also opens iGen to additional scrutiny and the epidemics of sexting and cyber bullying affecting many high schools.

Our Take: We believe that, as smartphone usage becomes ever more integral to basic functions in our society, it will continue to become completely normal to have access to these devices at a younger and younger age. It will soon be commonplace for elementary school children to have them.



HOW YOUNG IS TOO YOUNG FOR A SMARTPHONE?

Findings:

- iGen expects you to get your first smartphone younger than any other generation.
- Millennials look a lot more like Baby Boomers when it comes to their expectations around young people and smartphones.
- iGen has had more exposure to smartphones than any previous U.S. generation.

Impact:

- iGen is open to more positive and negative influences earlier because of smartphone access.
- Peer pressure, cyber bullying and tech dependence all increase the earlier that smartphones are normalized, but once it is normalized, it can potentially do more harm not to provide your teenager a smartphone.
- iGen will be the driver of smartphone trends from banking and dating to learning and communication.

Discussion Questions:

- What if the age at which you get your first smartphone continues to decrease? Will nine-year-olds eventually have their own smartphones?
- How does getting your first smartphone at such a young age affect your view of the world and how you access information?
- Do you think iGen will be more or less tech savvy than Millennials when it comes to mobile technology?

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iGEN IS CHANGING SHOPPING FOREVER

The very definition of shopping is changing as the digital world merges with the brick-and-mortar world to create a blurred shopping reality where stores are always open, inventory is always available somewhere and Amazon just might deliver within hours of you placing your order.

This new shopping reality is ALL iGen has ever known.

iGen has always known Amazon as an online retailer and not a river in South America. iGen has always gone to YouTube for makeup and fashion advice. And iGen has always thought that carrying cash or checks was outdated—and so might be that credit card in your wallet.

"iGen does not remember a time when the word 'Amazon' conjured up a vision more exotic than that of an online retailer."

-Jason Dorsey

But what does all this mean to the world of retail and how does it differ by generation? In our national study of iGen, technology and shopping, several clear differences were uncovered along with some unexpected similarities.

For the first time ever in one of our national studies, we had 100% of every generation answer a question the same way. The finding: 100% of EVERY generation said they would surf the Web on their phones looking for a better price when in a retail store or speaking with a salesperson face to face. 100%!

REAL-TIME MOBILE COMPARISON SHOPPING IS NOW THE STANDARD ACROSS GENERATIONS

100% of EVERY generation said they would surf the Web on their phones looking for a better price when in a retail store or speaking with a salesperson face to face.

100%!



iGEN IS CHANGING SHOPPING FOREVER

Digging further into the findings based on specific scenarios, we started to find interesting differences between how iGen and other generations approach shopping and technology. One of the most surprising differences is that iGen is more like Millennials when it comes to surfing the Web for a better price. These two youngest generations are much more likely than Baby Boomers and even Generation X to surf the Web looking for a better price. For example, we asked each generation if they would surf the Web on their phone to look for a better price or other options while shopping at a retail store for a laptop computer or tablet. These were the results of those who said they would:

- Boomers: 34%
- Gen X: 45%
- Millennials: 56%
- iGen: 50%

Notice that 50% or more of iGen and Millennials responded that they would, whereas less than 50% of Gen X and Boomers would. What makes this all the more impressive is that, when it comes to the iGen group that was surveyed, they are currently age 14 to 19! Think about that: these are teenagers saying that they would already search the Web using their phone before making a technology purchase.

"This expectation of comparison-shopping by iGen is an important trend because we predict that this will only continue to increase. As iGen enters adulthood and starts spending their own hard-earned money, they're likely to spend even more time trying to make the most of it as consumers."

-Jason Dorsey

The ease with which iGen can now comparison shop, whether by describing the product, scanning a bar code or even taking a picture, lends itself to their naturally taking that extra few seconds to see their options before making a final purchase decision.

This has been exacerbated with the oldest members of iGen being in middle school during the Great Recession. This generation is old enough to see, recognize and feel an emotional connection to the financial troubles facing Millennials as well as iGen's own parents and grandparents. The increased wallet watching of this period influenced how the oldest members of iGen view money, spending and shopping. This difficult period dramatically affected iGen's parents, who likely adopted new saving or spending habits and thus passed those on to their iGen children.



iGEN IS CHANGING SHOPPING FOREVER

Some experts say that iGen cares more about price and quality than brand, but we are not yet sure that this is the long-term consideration hierarchy for them. It is clear, however, that price and quality are a big consideration—possibly even more than brand. What we are sure about is the ease with which iGen can search for pricing information and the reality that money can be tight and jobs can be scarce, along with the ease with which iGen can track their money and spending in real time, make them the perfect generation to be cost-conscious and double-check their purchases before making them.

This reality will affect retailers forever as iGen exerts increasing influence over pricing, selection, ratings, reviews and more. The power of retail has truly transferred from the retailers, brands and merchants directly to the fingertips of iGen. This will likely continue to increase as iGen starts earning and spending their own money and move increasingly, albeit slowly, toward financial self-reliance. As financial self-reliance in the form of starting to pay for their own housing, transportation, meals and more grows, so too does the connection between spending in all areas and the desire to stretch the value of every dollar.

An underlying discovery is that iGen has come of age in a time when they have never had to pay retail price. Whether it was on bidding websites, discount websites, endless sales and promotions or loyalty rewards, paying retail was not a necessary part of their experience—but getting something at a discount was, and this is now part of their consumer expectation.

Going further, we believe that virtual reality will drive an even greater transformation on iGen's retail experience by allowing them to try a product not just before they buy it but without even the need to drive across town to engage in showrooming. No longer is any of that necessary and iGen is exactly the right generation to make virtual reality shopping the only type of shopping.

Our Take: We believe that this new, empowered generation of consumers opens the door for start-ups and small businesses if these companies can offer quality items in the online marketplace alongside brands. It will require these enterprises to have an online presence, but we've already seen the possibilities of this with sites like Etsy. Small businesses are no longer constrained by geography, which opens up a whole world of options but also poses a danger for local brick-and-mortar businesses. Shopping in stores will become more of a pastime, a recreational and possibly even social activity, with the bulk of real buying taking place online.



iGEN IS CHANGING SHOPPING FOREVER

Findings:

- iGen has come of age comparison-shopping on their smartphones.
- iGen comparison-shops online more than Generation X or Baby Boomers.
- iGen is the first generation to come of age when the power has truly shifted from the brands, marketers and retailers to the consumer.

Impact:

- Comparison-shopping by mobile device is next-generation shopping.
- Virtual reality will be the next game-changing technology that iGen shoppers lead.
- iGen may become even more conservative with their consumer spending as they enter adulthood and become more financially self-reliant.

Discussion Questions:

- How do you think comparison-shopping will change once iGen shoppers start spending more of their own money?"
- Have you noticed that iGen is more concerned about price and quality than brand? Or have you seen iGen have a different order of priorities when buying?
- How do you think virtual reality will most change shopping starting with the youngest generation?

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TENS OF MILLIONS OF iGEN SAY SOCIAL MEDIA DETERMINES THEIR HAPPINESS, WELL-BEING AND SELF-ESTEEM

iGen cannot remember a time before social media.

In fact, social media is not media at all to iGen but, rather, the medium for connecting, learning, showing off, expressing oneself, debating, dating and so much more. Social media is the medium that connects iGen to the world around them and connects the world to iGen, more than any other channel or communication option.

Given that social media is the channel where iGen connects, forges relationships, learns and documents every aspect of their lives, what role does social media play in determining iGen's happiness, self-esteem and well-being?

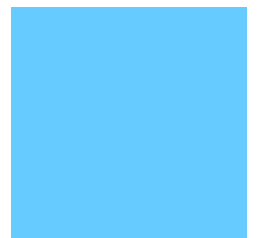
Does social media really affect how iGen thinks other people see them, their job prospects, dating and more?

"Tens of millions of iGen say social media determines their happiness, well-being and self-esteem. This impact will likely only grow as iGen gets older and has more freedom when it comes to their social media experience. In short, if you think social media is important to iGen now, just wait another five years."

-Jason Dorsey

As part of our landmark study on iGen, we dove into the world of social media to explore how iGen views social media, how iGen's views compare to those of other generations, and what iGen thinks about social media's impact on their own lives.

The findings are telling about both our society and this new generation—the sum of which will affect each of us.



TENS OF MILLIONS OF iGEN SAY SOCIAL MEDIA DETERMINES THEIR HAPPINESS, WELL-BEING AND SELF-ESTEEM

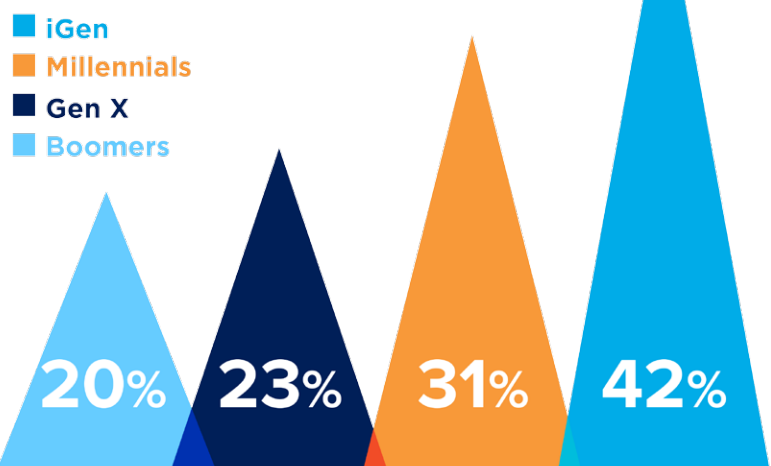
Finding 1: Forty-two percent of iGen, more than any other generation, says social media affects how people see you. This “outside looking in” assumption affects what iGen posts, how they think about social media as a tool for making a statement and the fact that the world looks at you through the prism of social media. In fact, our national study found that iGen is twice as likely as Baby Boomers to say that social media affects how people see you and scores 5 percentage points higher than even Millennials, who were the pioneers of social media.

Finding 2: The influence of social media on how people see you extends all the way into how iGen thinks about their popularity. Twenty-nine percent of iGen, more than any other generation, says that social media affects your popularity. For context and true generational divergence, iGen is three times more likely to say that social media affects your popularity than Baby Boomers and twice as likely as Generation X. This is a dramatic divergence among the four generations sharing some stage of adulthood at the same time.

Finding 3: The clear external impact and influence of social media on iGen has taken root in how they think about social media and their own well-being. iGen, more than any other generation, says that social media affects how you feel about yourself. In fact, 42% of iGen says this. The study found a significant gap in this area between iGen and Millennials, which is likely due to the fact that iGen’s entire life has been featured on social media—whether it was their Gen X and Millennial parents posting about them or iGen themselves literally growing up on their preferred social media platform. Case in point: iGen is more than twice as likely as Boomers to say that social media affects how you feel about yourself and scores more than 10 percentage points higher than Millennials!

HOW YOU FEEL ABOUT YOURSELF

42% of iGen feels that social media has a direct impact on how they feel about themselves. This is more than twice the number of Boomers!



TENS OF MILLIONS OF iGEN SAY SOCIAL MEDIA DETERMINES THEIR HAPPINESS, WELL-BEING AND SELF-ESTEEM

Finding 4: Just how deep does the influence of social media go into the psyche of iGen? A full 37% of iGen, more than any other generation in the national study, says that social media affects your happiness! Going further, 39% of iGen reports that social media affects your self-esteem. It's clear that the impact that social media already has on iGen, the oldest of whom are now barely exiting their teen years, will likely only increase as they express themselves more freely on social media and live more adult moments on the social media platforms that are creating ever-growing links between them and others.

Finding 5: When it comes to the real world converging with social media, iGen and Millennials are even in how much they think social media affects your job prospects, with 33% believing that it does so. However, 38% of iGen, slightly more than the 34% of Millennials, believe that social media affects your influence. For comparison, the national study found that iGen and Millennials both believe that social media affects your influence more than twice as much as Baby Boomers do.

Finding 6: The one area where iGen really outshines the other generations in believing that social media affects their world is dating. Twenty-seven percent of iGen says that social media affects your dating prospects. This is more than any other generation in the national study, four times as high as Baby Boomers and double the response of Generation X!

The bottom line: Social media has more of an impact on iGen than any on other generation in American history. The question is how iGen's relationship with social media will evolve as iGen moves further along the transition into adulthood. Will social media become the through-line that connects every area of their lives forever, or will iGen choose to limit what they post on social media as they get older?

What we do know is that social media has made the already awkward adolescent years even more difficult for iGen than other generations as the typical challenges of peer pressure at school, social status and bodily change are all available and direct to your social media feed 24/7/365.

Our Take: As iGen grows, giving more weight to social media and its capacity to influence personal lives, we believe that this trend will spread not only to the younger members of iGen but also to older generations. Much like technology use, this is a trend that will trickle upward. Soon Grandma will find more of her happiness and self-esteem affected by social media.



TENS OF MILLIONS OF iGEN SAY SOCIAL MEDIA DETERMINES THEIR HAPPINESS, WELL-BEING AND SELF-ESTEEM

Findings:

- iGen says that social media drives key external influences more than any other generation, including how people see you, your popularity and your perceived influence.
- iGen says that social media affects them internally more than any other generation, including their own happiness and self-esteem.
- iGen says that social media affects their real-world experience, including job prospects and dating, more than any other generation.

Impact:

- Social media has a greater effect on iGen internally than any previous generation, something parents and all adults need to know.
- Social media has a greater effect on iGen externally than any previous generation, something marketers, employers and leaders need to know.
- Social media is clearly the best way to reach and influence this new generation given the tremendous importance they place on it in virtually every aspect of their lives.

Discussion Questions:

- Do you think that parents and schools should spend more time teaching iGen how to use social media responsibly? Or do you think it is up to iGen to figure out what works for them?
- What do you think are the biggest tradeoffs for iGen spending so much time on social media?
- How do you think iGen's reliance on social media will affect how they work and interact in the workplace?

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WHICH SOCIAL MEDIA PLATFORM DOES iGEN PREFER?

Knowing that iGen has come of age with social media options ranging from the more traditional, such as Facebook and LinkedIn, to the newer options, such as Vine and Secret, which ones do iGen actually prefer? Do they prefer social media that has been proven to be the first choice of the trendsetting Millennials who showed just how mighty social media could be? Or does iGen prefer to pave their own path and want to become early adopters of newer social media outlets even before critical mass is reached?

Our national study revealed a generation with some clear preferences and definite divides when it comes to which social media platforms they prefer to use—and which they think is best for their own generation.

"iGen may not think Facebook is cool, but they are definitely not abandoning it. However, they are seeking out other platforms that better fit them and have less usage by their parents!"

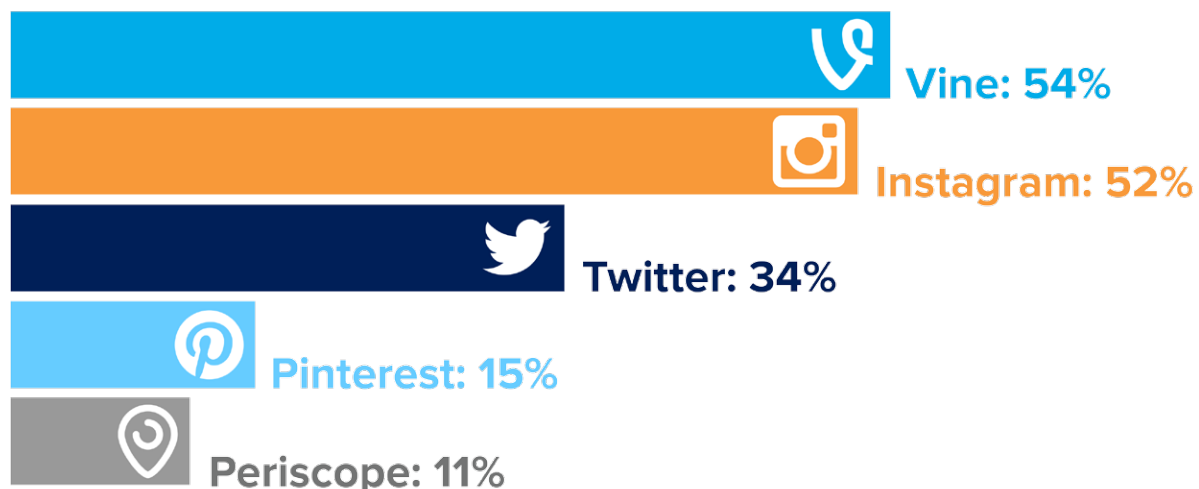
-Jason Dorsey

When we asked iGen across America to rank the social media platforms ideal for people under age 20, those who are technically in iGen, we found some surprises. Below are the top five social media platforms ranked by iGen as most ideal for iGen. Note the drop-off after number three:

- Vine: 54%
- Instagram: 52%
- Twitter: 34%
- Pinterest: 15%
- Periscope: 11%

IGEN SOCIAL MEDIA PLATFORM PREFERENCES

We asked iGen across America to rank the social media platforms ideal for people under age 20. What we found was surprising. Below are the top five social media platforms ranked by iGen as most ideal for iGen. Note the drop off after number three:



WHICH SOCIAL MEDIA PLATFORM DOES iGEN PREFER?

Going further regarding the social media experience of iGen, the national study also asked which social media platforms iGen has never heard of. Again, the results were interesting given the percentage of iGen that had not heard of certain platforms.

- 74% of iGen has never heard of Secret.
- 62% of iGen has never heard of Periscope.
- 34% of iGen has never heard of LinkedIn.

Before you think that iGen is behind the times, consider the percentage of iGen who has not heard of these outlets compared to the percentage of Boomers who have not heard of these social media outlets:

- Never heard of Vine: 6% vs 65% of Boomers
- Never heard of Periscope: 62% vs 76% Boomers
- Never heard of LinkedIn: 34% vs 14% Boomers
- Never heard of Instagram: 2% vs 9% Boomers
- Never heard of Pinterest: 8% vs 16% Boomers

However, before Mark Zuckerberg starts to worry about Facebook's role in the future of iGen, the national study found that 13% of iGen think that Facebook is ideal for their generation, while a strong 44% of iGen said that Facebook is good for any age—from their own generation to their grandparents' generation. While this clearly means that iGen does not think Facebook is the coolest social media platform in the world, with a combined 57% of iGen saying Facebook has a place in the social media space for their own generation, the death knell that the media likes to sound about it may be a bit hasty.

The results for the social media preferences of iGen clearly show a divergence from other generations, especially as the age gap between iGen and the other three generations, Millennials, Generation X and Baby Boomers, increases. This could be due to when the social media platform was introduced, wanting to be different from their parents or grandparents or simply a preference in the user experience that iGen wants to choose to spend most of their time on a specific social media platform.

Our Take: iGen has a voracious appetite for social media and a willingness to try basically any new platform. This will sustain the trend of creating and introducing new platforms. However, the fact that iGen also doesn't completely abandon older platforms like Facebook means that there will be a few industry veterans alongside a few hot new start-ups and a number of fizzles in-between.



WHICH SOCIAL MEDIA PLATFORM DOES iGEN PREFER?

Findings:

- iGen has markedly different social media preferences than other generations, with the divergence increasing based on the age gap from iGen to the generation being compared.
- iGen prefers Vine, Instagram and Twitter much more than other social media platforms.
- Facebook is not dead with iGen, but it's not as hot as iGen's preferred social media options.

Impact:

- If your business is built on Facebook, it's urgent that you extend your brand and build your following on iGen-centric outlets such as Vine and Instagram.
- iGen is not following in the social media paths of their parents and previous generations, which creates opportunities for new brands to skip traditional social media channels and just start where iGen is now.
- While iGen may not know all the latest social media options, they know about the social media options significantly much more than other generations, so make sure you reserve your brand's name on every outlet even if you only plan one post per month.

Discussion Questions:

- What social media platform do you use the most? How does that compare to what iGen prefers to use?
- Which of the social media platforms that iGen uses the most do you use the least?
- What do you think is the risk to employers and marketers if they are not using the social media platforms that iGen prefers to use?

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PHONE ETIQUETTE: LOST ART OR GENERATIONAL DIVIDE?

How and when iGen uses their smartphones is a hot topic for older generations. Is iGen rude in using their phone at all the wrong times or is that simply a myth that has taken on the appearance of truth given the emotional response it engenders from older people?

The national study asked each generation when they think it is appropriate and when it is not appropriate to use a smartphone for talking, texting and surfing the Web. The survey responses were analyzed by generation and situation to determine whether iGen truly abides by a different standard of accepted phone etiquette than other generations.

The overall result: the old timers were right—most of the time. In many categories and situations, iGen is more likely than Millennials, Generation X and Baby Boomers to think it is acceptable to use their phone in any manner. However, there was one glaring exception: in the workplace.

“iGen has been using phones, usually their parents’ and grandparents’ phones, for longer than most of them can actually remember. Now they’re taking their relationship with phones into situations that other generations cannot believe are acceptable, including their own weddings and job interviews.”

-Jason Dorsey

Before we dive into the work-related responses, consider that iGen, more than any other generation, said that it was more acceptable to use their phone in any manner while:

- Riding a bike
- Running on a treadmill
- During a religious service (!)
- While eating dinner with your family
- When meeting your significant other’s parents for the first time
- During a job interview (!)
- While having dinner with a date
- During your own wedding ceremony (!)
- When applying for a home loan

In fact, in a real doozy of a response, iGen said that they are more concerned about using a phone during a movie than during their own wedding, someone else’s wedding or a religious service while the service is going on! While only 4% of iGen feel it’s appropriate to talk on the phone in a movie theater during a movie, 9% feel it’s appropriate to talk on the phone during a wedding ceremony and 10% feel it’s appropriate to talk during their **own** wedding ceremony! It appears that all those movie warnings about turning off your phone must have really stuck with iGen. That, or they don’t think the dark background would make for a good selfie.

PHONE ETIQUETTE: LOST ART OR GENERATIONAL DIVIDE?

However, the real shocker of the study was revealed when it came to acceptable phone usage at work. We found that iGen is more reserved about their phone usage in the workplace than any other generation! That's right. While 15% of iGen, more than any other generation, said that it is acceptable to use their phone during a job interview, only 6% of iGen, a smaller percentage than any other generation, said it was acceptable to use their phone in any way while at work.

The results speak for themselves:

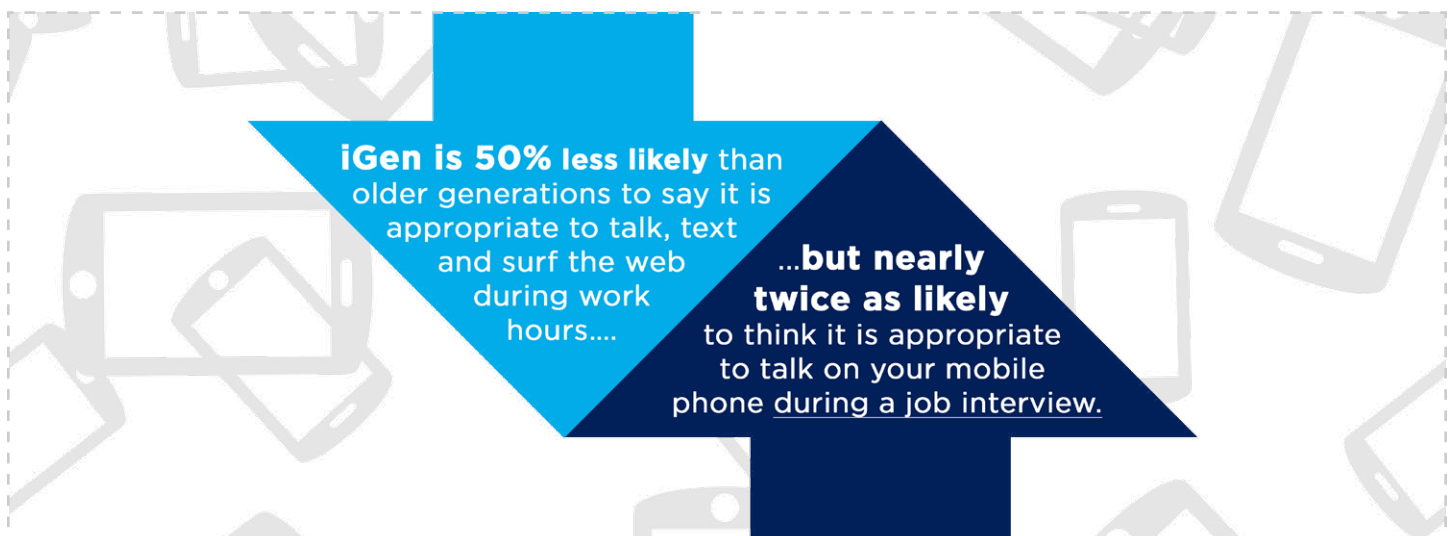
Percentage of each generation who think it is appropriate to talk, text and surf the Web during work hours:

- Boomers: 12%
- Gen X: 14%
- Millennials: 18%
- iGen: 6%

That's right, only 6% of iGen think it's okay to talk, text or surf the Web in any way at work. The affirmative response from Millennials was the highest of any generation and three times more than the affirmative response from iGen.

The net result is that a larger percentage of iGen than any other generation think it's okay to use their phone in virtually every social setting imaginable. Conversely, a larger percentage of iGen than any other generation think it's not acceptable to use their phone in any way at work.

Our Take: We suspect that these two divergent findings will start to look more similar. As phones become more and more ingrained in every part of society and as technology is created to make communication with these devices more seamless, older generations will start to use them as freely as iGen (though perhaps not during a job interview). As iGen enters the workplace, its members will start to ease up a little on their altruistic ideas about the smartphone's place at work. Before long, they'll be chatting, texting and surfing away with the rest of America's workforce.



PHONE ETIQUETTE: LOST ART OR GENERATIONAL DIVIDE?

Findings:

- iGen, more than any other generation, thinks that it is acceptable to use their phones in social settings.
- iGen, more than any other generation, thinks that it is not acceptable to use their phone during work.
- iGen's belief about the acceptable usage of their phone is likely still evolving, but in some areas, they look more like Baby Boomers and Generation X than Millennials.

Impact:

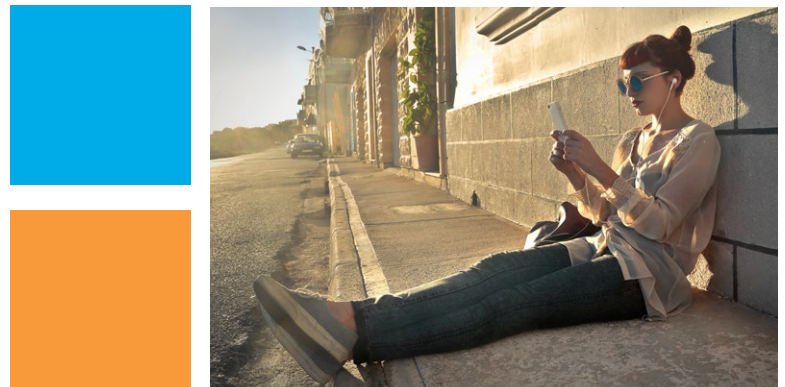
- Organizations will need clear and visible policies about acceptable phone usage in situations they might not have previously considered, such as in gyms and during religious ceremonies.
- Weddings and other social settings are clearly places where iGen wants to use their phones, so those hosting the event should make it easy for participants to participate using their phones, such as designating hashtags for a wedding.
- Companies must recognize that iGen is going to be bringing their cell phones to work and that, as Millennials move into management roles, what is deemed acceptable phone usage in the workplace could change even if iGen doesn't drive the change.

Discussion Questions:

- In which of the situations iGen thinks phone use is acceptable do you think phone usage is absolutely not acceptable?
- What about the iGen phone usage results most surprised you? What did you find the least surprising or most validating of your previous observations?
- When it comes to phone use in the workplace, what do you believe should be the guidelines you would give a new iGen employee?

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WHAT iGEN THINKS ABOUT ONLINE PRIVACY

iGen is not the first generation of digital natives; that mantle belongs to Millennials. However, iGen holds a potentially more powerful tag line: the first true cloud-based generation.

iGen is coming of age with their storage in the cloud, whether it's photos and social media or working collaboratively on school projects. This dependence on digital connectivity and the cloud as a repository for information means that iGen has always had experience making their private information in some form or fashion necessary to use online.

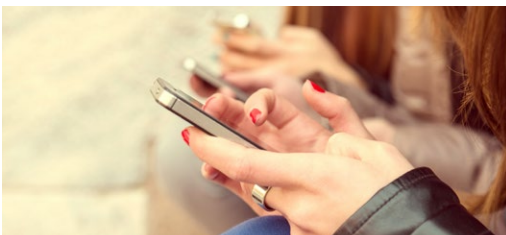
"Millennials may have been the first digital natives, but iGen brings a more powerful native relationship: cloud-based computing. This untethered relationship to information gives them more native freedom, computing muscle and influence than Millennials. It also gives them a different natural viewpoint on what is most important when it comes to technology solving your problems."

-Jason Dorsey

iGen is also coming of age in a time when hacking is no longer just done by techies in a basement but is now even led by entire countries and has been the subject of numerous movies and news headlines. Given that iGen has always been online, which means that they have always been digitally vulnerable, what do they think about online privacy?

Our national study revealed an interesting change taking place across generations.

iGen is more concerned about online privacy than Millennials but less concerned about online privacy than Generation X or Baby Boomers. Going further, if we extend online privacy to include other areas of privacy, we begin to see divergence between iGen and Millennials. For example, the study found that 63% of iGen is concerned when it comes to protecting their identity when paying with a debit or credit card online or in a retail store. This is more than Millennials, 58% of whom said the same. More than half of iGen is concerned about online privacy when using dating websites or mobile apps, while only 42% of Millennials are concerned about the same. In fact, iGen is more concerned than any other generation!



WHAT iGEN THINKS ABOUT ONLINE PRIVACY

Extending online privacy further, iGen is more concerned than Millennials about protecting their identity when sending and receiving messages. Thirty-eight percent of iGen expresses concern over this, while only 29% of Millennials have the same concern. This increased concern for privacy goes all the way into the day-to-day reality of iGen and their education. A full 38% of iGen are worried about protecting their online privacy and security when at school.

But here is the twist...

Of all the generations, iGen has the LEAST concern about their privacy of any generation when it comes to paying with mobile apps, such as Venmo, and using social media.

This is particularly true when comparing iGen's responses to the composite of the other three generations. The reality that iGen has less fear than any other generation in these areas could support why iGen has been the fastest adopters of mobile payment apps as well as social media. Whereas iGen has basically always known these two options to be a part of their coming-of-age experience, every other generation has come to them later in life, which could be the driver for their concern about privacy using those technologies.

From a workplace perspective, iGen does have the least concern about protecting their privacy at work, but they are in the general range of the other generations, particularly Millennials. Where 34% of iGen is concerned about online privacy and security at work, 35% of Millennials, 38% of Gen X and 37% of Boomers share this concern. It will

be interesting to see how this view about privacy at work changes as more members of iGen enter the workforce and move from entry-level jobs into roles with more responsibility.

Our Take: iGen's concern about online privacy is well founded and based in its realistic view of the world we live in, but it's also balanced with the generation's innate tendency to try to incorporate new technologies. As iGen continues to enter the workforce and adulthood, this balance of caution and willingness to use new technology will provide a perfect landscape for new technologies and ingenuity that play to both priorities. After all, those most concerned about safety often invent the best safeguards and those with a curiosity and natural fascination toward something often create the most interesting ideas. What better combination than digital natives with a sober grasp of the reality of the risks?



WHAT iGEN THINKS ABOUT ONLINE PRIVACY

Findings:

- iGen differs from other generations in their views about online privacy.
- iGen is more concerned than other generations about online privacy in a number of areas, such as paying with debit or credit cards and online dating.
- However, iGen is significantly less concerned about their privacy when using technologies native to them, such as mobile payment apps and social media.

Impact:

- Online privacy means something different to each generation and companies will need to adapt accordingly.
- iGen's view about online privacy in the key areas of mobile payment apps and social media creates opportunities for continued growth with this new generation, as they trust these channels more than other generations do.
- iGen currently has the least concern about their privacy at work, which may mean that they need the most education on the steps they are required to take to maintain privacy while on the job.

Discussion Questions:

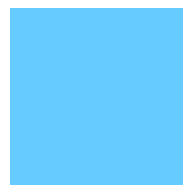
- Do you think that iGen is naïve when it comes to their expectation about digital privacy, or do you think they are just more realistic given their natural technology relationship?
- Do you think that companies are doing enough to educate employees about the steps they should take to secure their privacy at work?
- How do you think differing views on digital privacy affect how different generations communicate, shop and work together?

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iGEN'S VIEWS ON SHARING ECONOMY SERVICES SUCH AS UBER

The sharing economy based on peer-to-peer services, comprised of high-profile companies such as Uber, Lyft and Airbnb, has been a highly touted business breakthrough. This business model that leverages personal time and underused assets, such as your own car or an extra bedroom in your home, took shape and went from an innovative business practice to a normal business practice in the time that iGen has come of age.

Another way to think about it: Uber has been pairing drivers and passengers since the oldest members of iGen were in middle school. Given that the sharing economy has come of age alongside iGen, we asked: What does iGen think about this business model that combines on-demand technology, a quick way for people to earn extra money and solving a problem using something one person is paying for that another person needs for a short time?

"Uber, Lyft and other shared service providers are the solution that iGen expects. Many members of iGen will come of age not remembering a time before they would get in an Uber on the way to a concert, see a friend or come home from a night out."

-Jason Dorsey

When it comes to safety, iGen says that their #1 source of trust for sharing economy service providers such as Uber and Lyft are background checks. Sixty-three percent of iGen cites this as one the top three most important things and 28% cite it as the most important. This is more than any other generation and gets a higher score than any other trust factor, including online ratings and reviews. This would lead one to believe that, for companies to attract and keep the business of this new generation, their people need to complete background checks, and this should be heavily advertised.



iGEN'S VIEWS ON SHARING ECONOMY SERVICES SUCH AS UBER

iGen also reported caring more about a service carrying insurance than any other generation. In fact, 11% of iGen, nearly twice as much as any other generation, reports that a company having insurance for users, such as insurance being provided to cover passengers in an Uber ride, as the top reason that makes them trust a service provider. This is a somewhat shocking finding when you consider that, in the context of age, 14 to 19 year olds—today's teenagers—care more about their Uber driver having the right car insurance in case they get into a car accident than any other age group, including their parents!

Another big generational gap between youngest and oldest: 25% of Baby Boomers don't trust shared service providers at all, more than any other generation.

The net result is that iGen has come of age always being able to access the sharing economy for transportation, housing and more, but they also have a more practical approach about it. The new, young generation, more than any other generation in America, expects their service providers to have background checks and carry the right liability insurance.

Our Take: Similar to iGen's balance of privacy concerns and love of new technology, we believe that the generation's comfort with shared economy services and expectations for security will lead to the best possible outcome for this industry and the services within.

iGen is nearly twice as likely as any other generation to list liability insurance and background checks as the #1 way to earn their trust.



That means iGen takes a practical approach to the business model and safety and cares more about their Uber driver having car insurance than any other age group, including their parents!

iGEN'S VIEWS ON SHARING ECONOMY SERVICES SUCH AS UBER

Findings:

- iGen has always known share-economy services, such as Uber and Airbnb, to be a standard type of business service.
- iGen looks for background checks as the main source of their trust in these services, more so than any other generation.
- iGen, more than any other generation, expects their shared service providers to carry liability insurance to be trustworthy.

Impact:

- Shared services are a core business model that iGen counts on to solve their challenges, from transportation to temporary housing.
- Shared service providers must do background checks if they are to earn the trust of iGen as consumers.
- Carrying insurance should be advertised by shared service providers as an effective way to increase trust with iGen as customers.

Discussion Questions:

- If you always remember being able to use Uber or rent a house through Airbnb, how might that change your transportation or travel patterns?
- Which of these shared services have you used and which have you not used: Uber, Lyft, Airbnb and HomeAway?
- Do you think it's a good or bad thing that the shared service economy is growing so quickly? Why?

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CONCLUSION:

WHAT WE SEE SO FAR WITH

iGEN (OR GEN Z)

iGen is a more complex, thoughtful generation than many would assume given their age: 20 and younger. This generation after Millennials is soon to become the fastest-growing generation in the workforce, marketplace and adult society. They already are the super-majority in our traditional higher education system.

“The generation after Millennials is very different from Millennials. In fact, they think Millennials are old! This new generation, iGen, is poised to change everything and will be the driver of growth for the coming decades.”

-Jason Dorsey

The impact of iGen is only beginning to be felt, but is seen earliest in how they use technology. This is important for every generation since how iGen thinks about and uses technology is a harbinger of how the rest of us will likely, eventually, think about and use technology. We saw this phenomenon of the youngest influencing the oldest as Millennials came of age. We are seeing the same now, as iGen thinks differently from other generations about social media, phone usage, online shopping and online privacy.

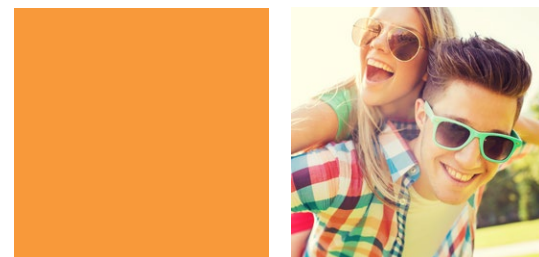
The leaders who identify the challenge that iGen brings, along with the opportunity within that challenge, will be positioned to understand and unlock the power of an entirely new generation before their competition does. This is truly a once-in-a-generation opportunity.

At The Center for Generational Kinetics, our passion is uncovering the mindset, behaviors and best practices that solve the challenge and unlock the talent that iGen brings as employees, customers and citizens.

We know the challenge that the generation after Millennials brings is only going to increase, but we also believe that the opportunity they drive as employees, customers and citizens will increase as well.



The leaders who identify the challenge that iGen brings, along with the opportunity within that challenge, will be positioned to understand and unlock the power of an entirely new generation before their competition does. This is truly a once-in-a-generation opportunity.



CONCLUSION:

WHAT WE SEE SO FAR WITH

iGEN (OR GEN Z)

iGen is about to change the world as we know it. The Center for Generational Kinetics is committed to preparing you to make the most of that change.

This report, iGen Tech Disruption, is the first in our landmark series on the generation after Millennials, known as iGen, Gen Z and Centennials.

Visit GenHQ.com/iGen to sign up now for the complete report series and watch the acclaimed TEDx talk, [What Do We Know about the Generation after Millennials?](#)

Contact us today to see how we can help. Thank you for being a bridge between generations.

Sincerely,

Jason Dorsey and
The Center for Generational Kinetics
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+1 (512) 259-6877



iGen is about to change the world as we know it. The Center for Generational Kinetics is committed to preparing you to make the most of that change.

ABOUT THE CENTER FOR GENERATIONAL KINETICS

The Center for Generational Kinetics is the #1 expert and research firm on iGen and Millennials.

The Center's team of PhD researchers, strategists and acclaimed speakers enable companies and leaders to solve tough generational challenges quickly.

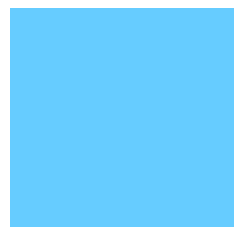
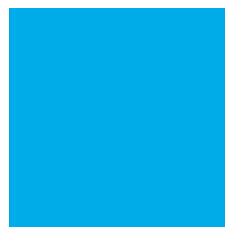
The Center is known for leading research and designing solutions that drive measurable results for clients.

With over 150 research, speaking and solutions clients per year around the world, from car manufacturers and hoteliers to insurance, healthcare and technology pioneers, The Center leads how influencers think about generations.

A trusted source for the media, The Center's team has been featured in hundreds of media interviews from 60 Minutes to The New York Times.

Contact The Center for Generational Kinetics today to learn how we can be a resource to you.

Reach us at GenHQ.com.

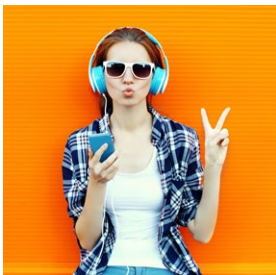


ABOUT THE LANDMARK iGEN/GEN Z SERIES

Millennials caused quite a stir as they came of age, but that will likely pale in comparison to the change that iGen brings upon the world. This landmark study series was designed to ask the tough questions and find the actionable insights that leaders in all walks of life need to make informed decisions. Getting these decisions right will become increasingly important as iGen moves further into adulthood and becomes the fastest growing generation of consumers, employees and your neighbors.

At The Center for Generational Kinetics, we knew that statistically valid, national data was woefully missing from the conversation about the generation after Millennials. Lots of people have opinions, but virtually none of them had any real research. This national study series is designed to fill in the gaps and open new conversations about the exciting, diverse, thoughtful generation after Millennials and how they will impact our world—and how we will impact them.

Stay tuned for the next report in the series... there is much more to come!



NATIONAL STUDY METHODOLOGY

This research study was designed and led by The Center for Generational Kinetics. The survey was administered to 1,000 U.S. respondents age 14-69, with an additional 250 oversample of ages 14-17. The sample was weighted to the current census data, and participants were screened for U.S. citizenship.

The survey was conducted online from October 15, 2015 to October 21, 2015 and has a confidence interval of +/-3.1%.

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