



## Meet Generation Z

A Research Project commissioned by the insights wing at



# 1. HOME PAGE





# Who are the Gen Z?

**Bold, go-getters, progressive, conscious, and very comfortable in their own skin**, Generation Z (born between 1997 to 2012) have become the center of attention when it comes to talks and discussions, be it sports, shopping, or marketing, to name a few.

The Gen Z entering the workforce implies that they now have independent spending and consumption capabilities, replacing millennials as the largest consumer group. However, what is even more crucial is how Gen Z are influencing the spending of their parents within the household. According to NRF, a significant percentage of parents<sup>1</sup> agree that their Gen Z children influence family spending decisions. It is important that we talk about this dynamic generation with choices very different from their millennial counterparts as the shift from millennials to Gen Z takes place.

**Socially conscious, largely inclusive, and intolerant of any form of discrimination**, they are people who are **pragmatic yet deeply caring** when it comes to what affects communities at large. This particular mindset is not only commonly seen in the Gen Zs of the West but has seeped into the Indian Gen Zs, particularly residing in the metro cities, who are heavily influenced by the Western culture.

Probably the thing which Gen Z's love the most is authenticity and real people and stories. Driven by the zeal to shape their own world, Gen Z is the generation to look out for by brands and marketers as their purchasing power quadruples a couple of years down the line.

# Decoding Gen Z mindset

Gen Z are known to be largely shaped by the internet. They use their online presence to find and belong to a clan to help them cope with being the **most depressed generation**. They are also **largely sensitive about issues that are prevalent in the world**.

All Gen Z's are inclined to reject parental and societal values<sup>2</sup> regarding gender expression, appearance, discrimination based on race and caste and **wants to appear as the more woke and progressive generation** than their predecessors.

Spoilt by the multiple choices, Gen Zs in metro cities are faced with **heightened confusion and uncertainty**. However, when it comes to the second and third-tier cities, Gen Zs are found to still hold onto their Indian cultural values and norms as anchors to guide them and provide them with a structure amidst the confusion and chaos. Therefore, you find Gen Z still opting for so-called high value careers such as engineering, medicine or business to boost their family's reputation.

Indian youth are attracted to podcasts<sup>3</sup> as an intellectually stimulating property to play in the background while doing chores or browsing the net. 46% urban Gen Z and 52% of non-metro Gen Z's are habituated to listening to podcasts.

In terms of brand choice, 92% Gen Z's are found to support brands with a purpose<sup>4</sup>. They are **4X** more likely to consider the brand when purchasing items and **6X** more likely to stand up for the brand at a difficult stage. When it comes to brands they disagree with, **88% Gen Z's** are known to act negatively towards such brands.

The Western and Indian urban Gen Zs are now **more openly seeking help and speaking of mental health**. While there is still some amount of stigma associated with the topic among the Gen Zs of second and third-tier cities, they are still exhibiting their wokeness by supporting others suffering and sharing content on the topic to spread awareness.

# Decoding Gen Z mindset



# Daily Interactions in a Gen Z's Life



Gen Z's are exposed to multiple brands based on the interactions they have on a daily basis and the kind of lifestyle they lead. On analyzing the journey of a typical Gen Z, certain behaviors stand out such as their daily usage of social media, their inclination to be financially aware, their focus on personal growth and development and more. Based on these behaviors, we have highlighted the daily interactions a Gen Z has in their life and focused on them for our individual reports



## SOCIAL MEDIA

The Indian influencer market is on the rise as Gen Z's are trusting influencers when making purchase decisions – **70% teens trust influencers more than celebrities**



## FINANCIAL PLANNING

One of the topmost concerns for the Gen Z across the world is the increased cost of living – **32% Gen Z's are savers than spenders**



## WORK CULTURE

Work for young Indian's has become location agnostic & they are attracted to a fluid lifestyle – **69% Gen Z's respond to work-related messages & calls at home**



## FITNESS AND HEALTH

**36% Gen Z women & 32% Gen Z men** are becoming more vocal about spreading awareness & seeking help for their **Mental health**

## PERSONAL DEVELOPMENT

For Gen Z's learning is key to becoming successful in their career – **69% agree to the fact that learning will help them expand their role**



## ENTERTAINMENT

Gen Z has emerged as the major chunk of the OTT and video consumers in India – **nearly 27.2% have made a digital movie purchase in the last one year**



## SHOPPING BEHAVIOR

Gen Z's are socially and environmentally conscious – **64% are willing to pay premium amounts for products that are sustainable**



## TRAVEL AND TOURISM

Gen Z's are eager but price-sensitive travelers – **37% consider cost of travel & 32% consider accommodation as major barriers in planning their trip**



# Purpose of the study

As thought leaders, at LIQVD ASIA, we aim to aid brands and marketers in better understanding this largely complex yet simple generation of a new yet significant consumer group. We will talk about the behavior and drivers, purchase patterns, and the moral codes and mindsets of the Gen Z through a pan-India research featuring the Gen Z themselves.







## 2. RESEARCH METHODOLOGY





# Methodology

## OBJECTIVE

Investigate the behavior and drivers, motives, moral codes and mindsets of the Gen Z when it comes to OTT and Video Consumption.

**800**

Gen Z Interview  
Respondents  
per report

## APPROACH

- Thorough enquiry of previous findings on the prevailing behavior and consumption patterns of Gen Z within the OTT space.
- Qualitative methodology through unstructured qualitative Interviews & a comprehensive survey.
- Focus Groups
- Other facts and figures are derived from credible secondary sources: GWI, Forrester, Gartner, Nielsen, Research journals, et. al.

**20+**

Cities

**100+**

Survey  
Participants

Industry expert  
interview

\*Sample size of 800 respondents in total was maintained after reaching content saturation. In this case, sample size of 800 was sufficient to arrive at a conclusion.





# 3. REPORTS



# OTT & VIDEO CONSUMPTION

Decoding Behavior, Purchase Patterns, Moral Codes &  
Mindsets of the Indian Gen Z





# In This Report

1. OTT in India
2. The OTT Consumer Journey
3. Key Insights
  - FOMO//Content Exhaustion
  - Escapism//Relatability
  - Personalization//Exploration
  - Global//Regional Content
  - ME Time// WE Time
5. Expert Interviews
6. Implication Summary

# OTT in India

India is expected to have more than 500 million online video users by FY 2023, making it the world's second largest market behind China alone.

Gen Z has emerged as the major chunk of the OTT and video consumers in India. Based on GWI reports, nearly 27.2% Gen Z have purchased a digital movie or TV streaming service in the last one year.

65% of millennials (26-39 years), and Gen Z (5-25 years) consume OTT Video content and the consumption is much higher among Gen Z<sup>13</sup>.

Reasons varying from it being a hobby to something that helps them relax and bond, have led to the increased consumption amongst the Gen Z.

Reasons behind the growing OTT and video consumption:-

UNINTERRUPTED 4G  
CONNECTIVITY ANYWHERE &  
EVERYWHERE

MULTIPLE SCREEN  
PROVISIONS

TELCO BUNDLED SERVICES

LOWERED-COST  
SUBSCRIPTION

INCREASED VIEWING DURING  
COVID19 OUTBREAK

NEW RELEASES ON OTT

Source:<sup>13</sup> Now Streaming: The Indian Youth OTT Story, 2020 Dentsu



Wide variety of global content, UI/UX



Originals & regional content



Selective franchise: Marvel, Disney,  
Sports live streaming



Learning & up-skilling



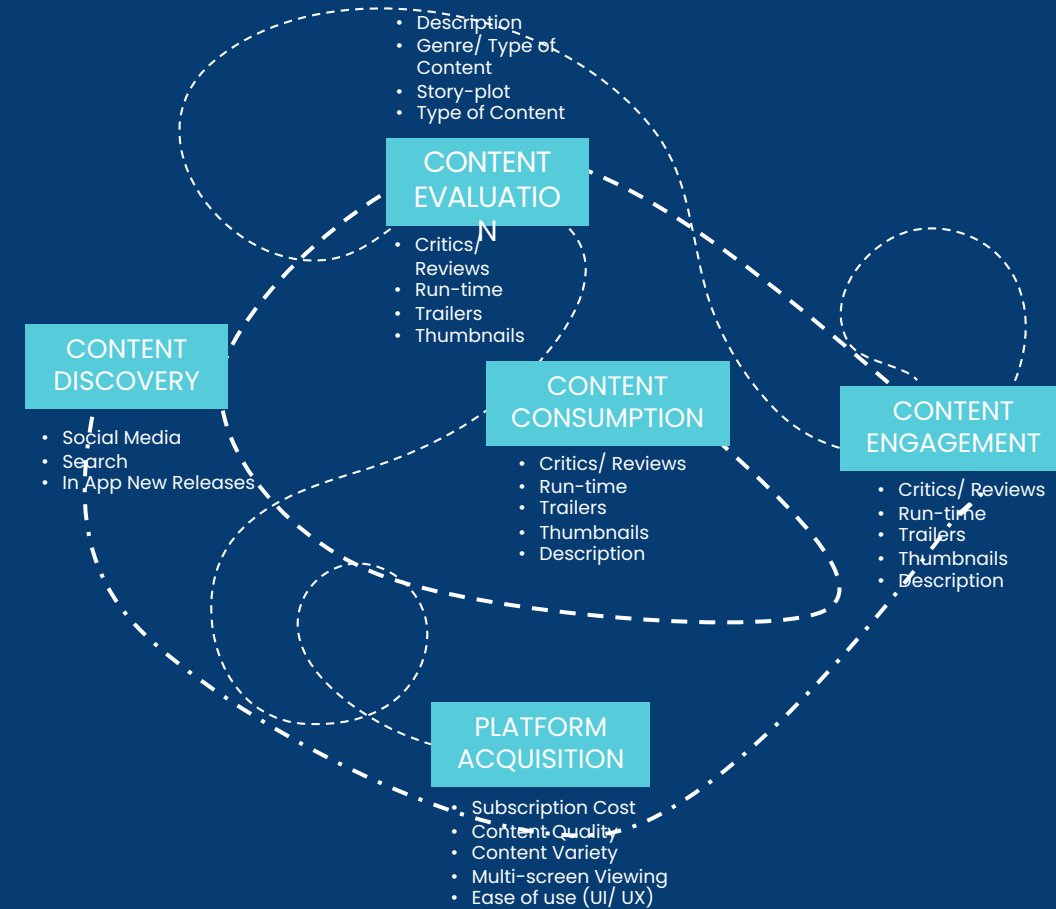
Regional, Originals, Reality Shows, Special  
Featured Content

# The OTT Consumer Journey

An OTT Consumer's Journey is more often than not quite convoluted. It is unlike a typical consumer journey, where a consumer goes through the stages of discovery, evaluation, acquisition, consumption and then engaging or advocating in a linear fashion. **OTT Consumers have a non linear journey** where they often mix and match steps or even skip a few, albeit not intentionally.

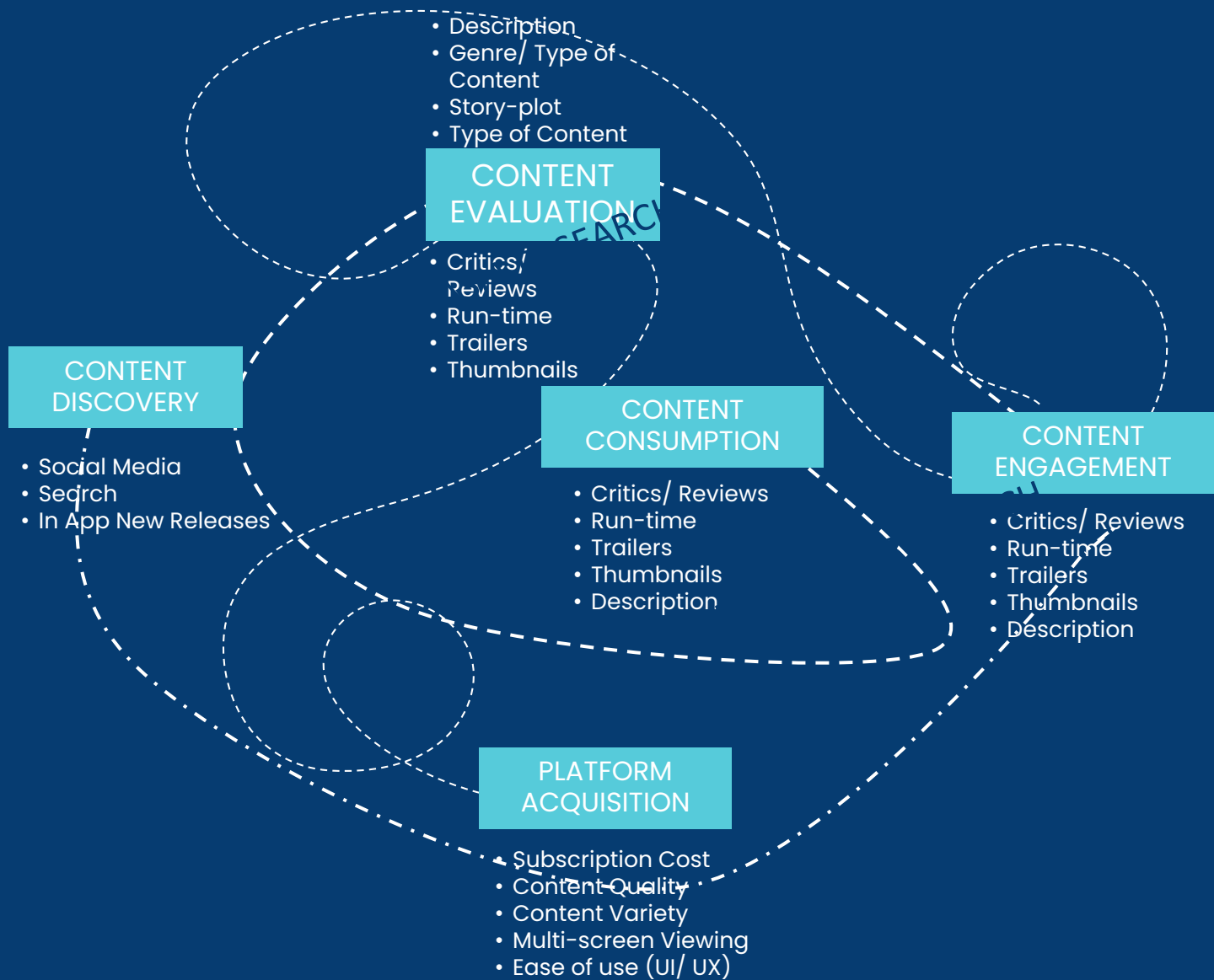
What's interesting here is that each OTT consumer doesn't necessarily go through this journey step-by-step. At times the engagement with content related to the video content to be consumed happens before the consumption/viewing. Other times, the discovery is followed by the consumption directly. Not just this, the journey keeps on changing for a person each time they consume OTT video content too.

## The Convoluted OTT Consumer Journey\*





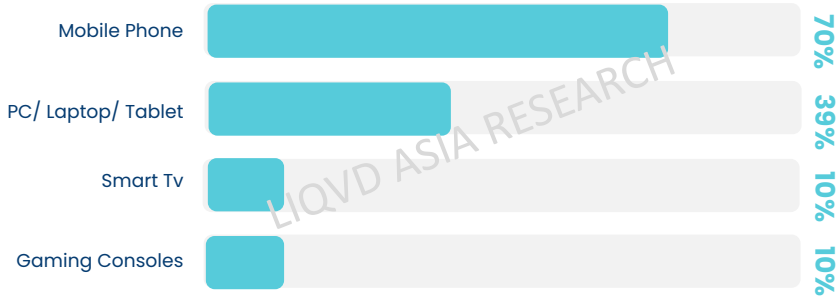
# The Convoluted OTT Consumer Journey\*



Source: Representative Consumer Journey inspired by Google: The Messy Middle

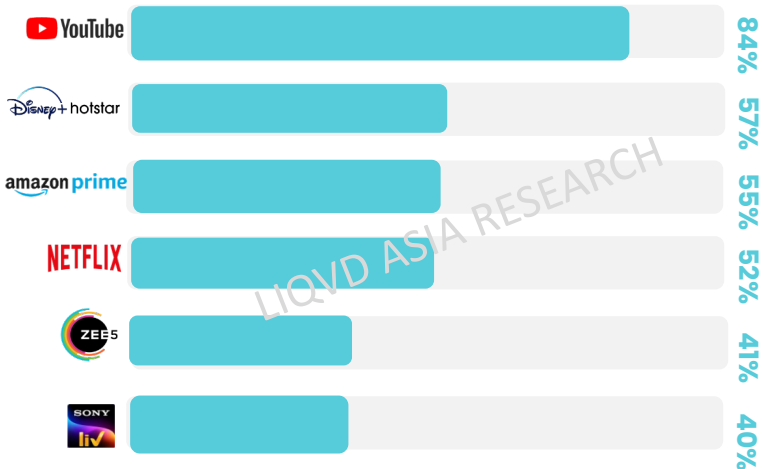
### Which of the following are your preferred devices for watching video content?

% of Gen Z respondents preferring a device choice to consume OTT content.



### Which are the most watched / engaged Video Streaming Services?

% of Gen Z respondents subscription to an OTT platform.



**87%** Said they choose a platform based on quality content offered

### How regularly do you engage with the following OTT platforms?

% of Gen Z respondents engagement regularity with on platforms.

| Platform        | Regularity           | % of Gen Z |
|-----------------|----------------------|------------|
| YouTube         | More than once a day | 46%        |
| Disney+ hotstar | Weekly               | 20%        |
| amazon prime    | Weekly               | 21%        |
| NETFLIX         | Weekly               | 18%        |
| ZEE5            | Weekly               | 15%        |
| SONY liv        | Weekly               | 15%        |
| 4L              | Weekly               | 7%         |
| voot            | Less Often           | 6%         |

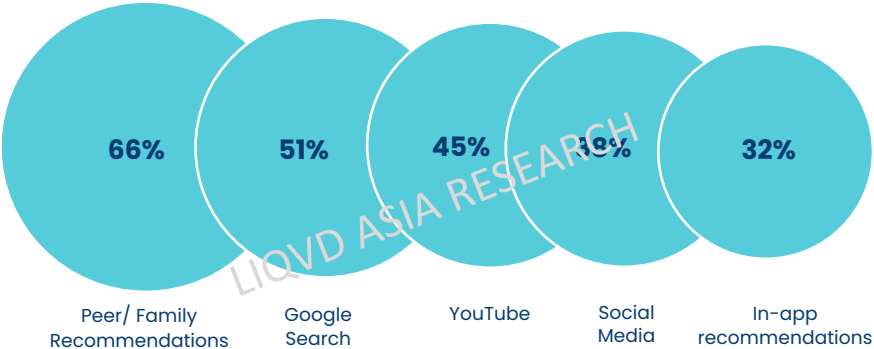
The most popular genres among Gen Z include **Comedy, Thriller, and Action based entertainment**

**Animated Series/ Cartoons, Anime, Korean, Spanish & Foreign Dramas** are also picking up amongst Gen Z

**0.5 – 2 Hours** Were spent watching content on OTT platforms by **37%** Gen Z

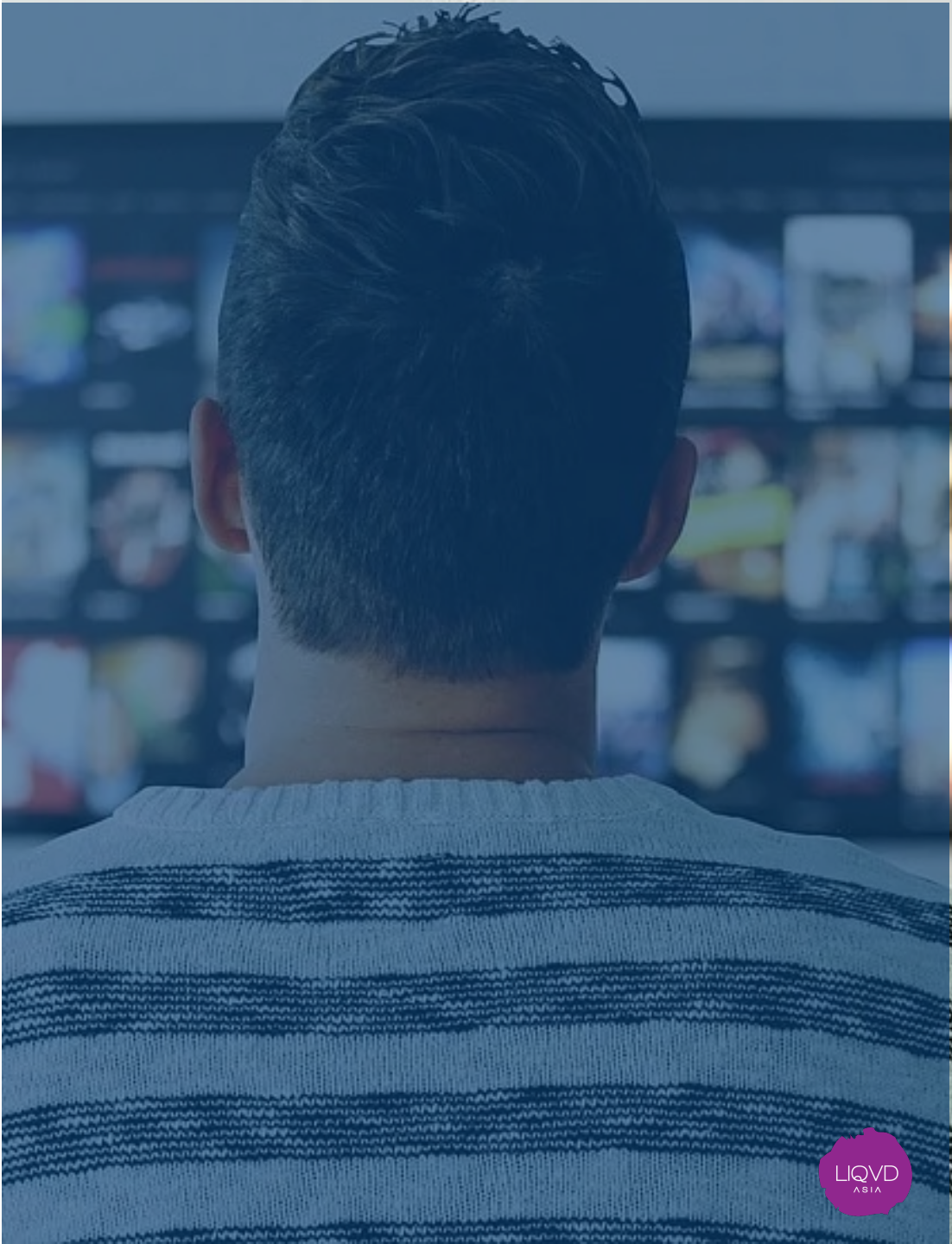
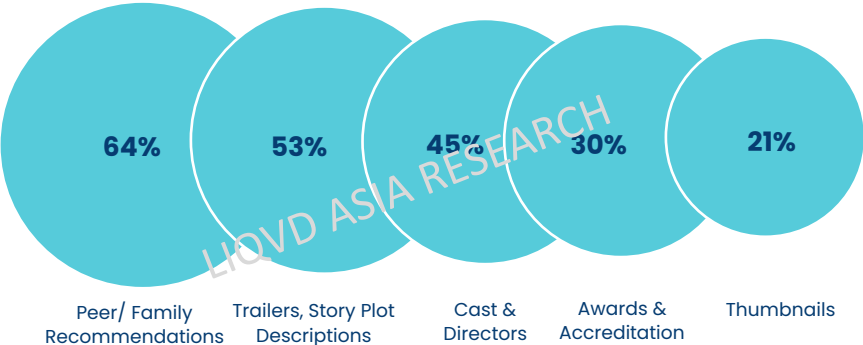
**What/ Whom do you rely on when discovering new content to watch on OTT platforms?**

% of Gen Z respondents ranked parameters on the basis of importance.



**How do you evaluate a series/ movie/ show before watching it on an OTT platform?**

% of Gen Z respondents ranked parameters on the basis of importance.





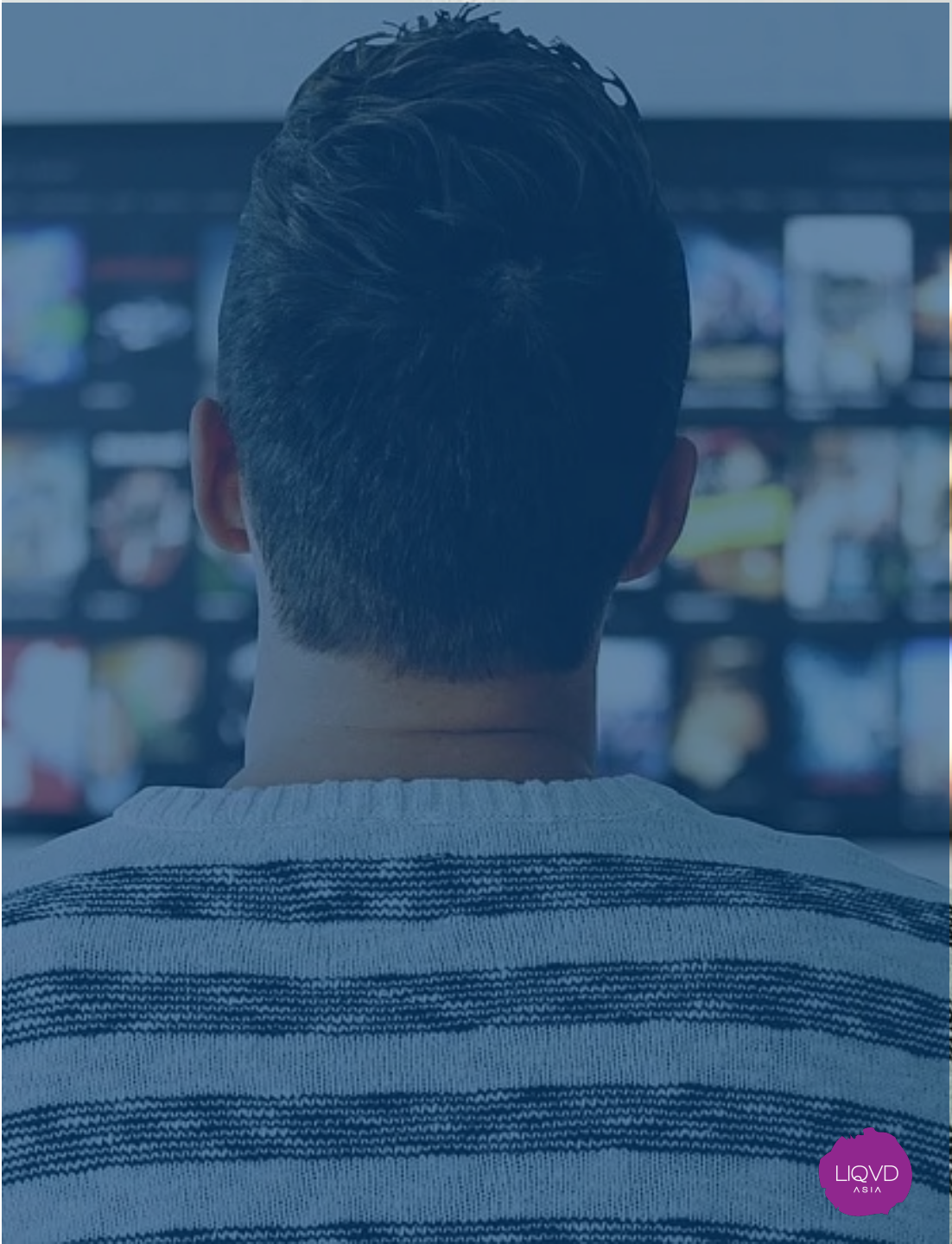
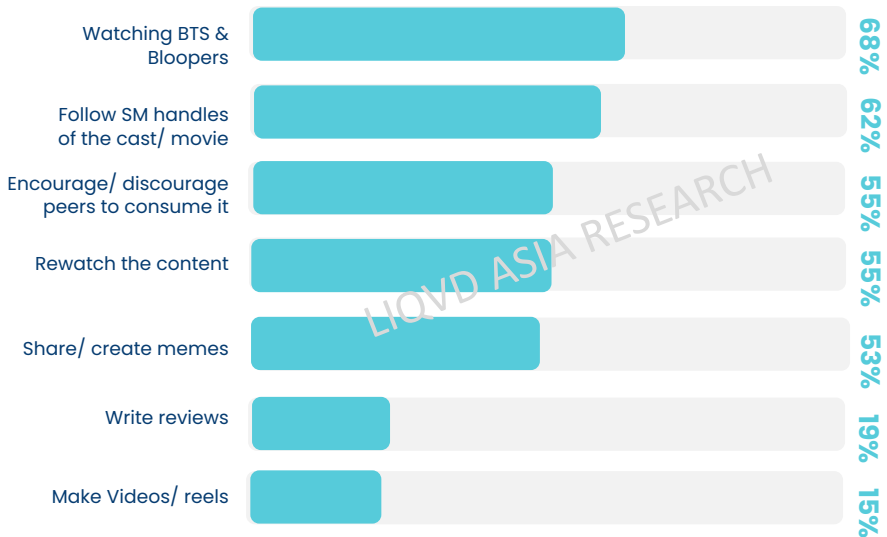
How do you acquire a new OTT platform?

% of Gen Z respondents stated their typical way of subscribing to a new platform.



Have you ever engaged in the following acts before / after watching a series/show/movie?

% of Gen Z respondents engaged in the type of activities basis relevance.



03

## Key Insights

The need to be heard & to belong resulting from FOMO

To combat the feeling of isolation, Gen Z want to feel like they belong to a community & want to experience validation & acceptance from the same

Looking back at simpler times as a form of Escapism

The future & its uncertainties are an anxiety causing trigger for the Gen Z. To cope with these uncertainties, the Gen Z turn to simpler times taking them down a more certain nostalgic memory lane

Like personalized experience, but don't like being followed

Gen Z are okay to share data as long as it is used carefully. They are aware of being targeted but would like transparency/ authenticity in the ad communication

The demand for a gripping storyline above all

Gen Z value storyline above preference for genre & language. While western influence continues to dominate, Gen Z continues to enjoy watching regional content as well

Recognition & establishment of Me Time & We Time

There is a clear understanding in the minds of the Gen Z that both Me Time & We Time are essential. Gen Z have divided their days smartly to give equal focus to both spending time with peers & enjoying some alone time

# 04

## Finding The Balance

Social beings are complex. Preferences and behavior patterns change over time as mindsets change and technology integrations take place.

Keeping that in mind, not surprisingly, the motivations, behaviors, and preferences are largely skewed across generations. Not just across but within generations, preferences remain skewed but the larger moral codes that guide them remain common. The personality characteristics and traits that attribute to a particular Generation remain largely common.

With the newer generation, particularly Gen Z, taking over their preceding generations, there is an increasing need to understand how they behave and why. What better space to analyze than OTT and video consumption to understand this generation that has had all things digital since forever?

We conducted a thorough analysis of the Gen Z behavior and consumption patterns when it comes to OTT and video content through interviews and focus groups. What was revealed goes on to indicate just how complex this generation is.

Gen Z as a generation is dynamic. Our study revealed certain behaviors, attributes, and preferences which are common amongst Gen Z. We will try to delve deeper and explore the duality of Gen Z and look at them through the two ends of the spectrum.



# FOMO // Content Exhaustion

The pandemic took a lot from us, particularly Gen Z, who missed out on quintessential experiences like their last day of school, the first day of their first job, or just the simple activity of hanging out with friends. The Fear Of Missing Out is thus now more real than ever. From this stems the **desire to remain part of conversations**.

Gen Z as a generation is thus guided by the current buzz on social media, the daily trends, and the conversations within their immediate cohort.

With OTT and video content consumption picking up pace, the latest shows/ movies being launched on digital platforms or even old ones that resurface and go viral on social media, have become the center of discussions.

To be able to participate and stay relevant, most Gen Z have become major consumers of OTT and Video content.

When it comes to OTT, there is a wide variety of content available online across the 20+ platforms. **Choice fatigue** is thus a problem that has recently been more obvious, particularly when it comes to these subscription services.

It complicates further for the Gen Z when FOMO kicks in. Gen Z want to be a part of the banter surrounding shows or movies trending on social media and within their immediate cohort. But, they are bombarded with so much content that they find it **difficult to keep up with the pace at which content is being released** these days.

Studies suggest, FOMO affects **56%** of persons between the ages of 18 and 30

Gen Z is defined by its desire to be accepted and to be a part of a community

*"I only heard about Netflix, and majority of people talk about Netflix.. So, I have brought subscription."*

According to a survey, **67%** of Gen Z worldwide believe there is too much choice online

*"There is so much content out there!! I tend to invest so much of my time just to decide what to watch and then I watch nothing."*





## FOMO // Content Exhaustion

66%

Gen Z rely on **peers/ friends for recommendation** on the choice of content

77%

Gen Z have a **tendency to acquire a new platform to watch a series/show that is trending** on social media or amongst your peer group



# Escapism // Reality

Gen Z are multi-taskers taking on a lot of things at the same time and wanting to excel in them all. They find it almost difficult to experience a moment of silence, what with the constant bombardment of information & content online.

**Gen Z are known to be a largely anxious and stressed generation.** As a way to disconnect with the ever-present stress & anxiety, they like slowing down & looking back at the past for a sense of comfort & certainty.

They find comfort in transitioning to an alternate world to step out of their current situation, which leads to the majority of them resorting to binge-watching as an active form of content consumption, a trend that particularly picked up during the lockdown.

They tend to turn to content consumption, particularly OTT video consumption, to cope with the everyday stresses of their fast-paced lifestyle.

The Gen Zs, being more aware & woke than their Millennial counterparts, consider it important to relate with the content they consume.

In terms of evaluating the kind of content to consume, Gen Z focuses on a relatable story plot as they prefer staying relevant to the realities of the world. They watch content not just for entertainment purposes but also as a form of research-based consumption & as an opportunity to learn, either about the current situation they are in or the current conversations going on in the world.

**87%** of Gen Zs look at content consumption as a way of escaping from their everyday situations

*"I kinda like 2000 movies, I feel a lot of things happening in those movies and now it's a guy asking out a girl, just a text over the phone.... Ya, I miss those kind of movies."*

Studies have shown that Gen Z, a generation suffering greatly from loneliness, resort to binge-watching & short-form content watching as a form of escapism

*"I am a Binge watcher type... I kind of see the content whole day, but I still study in between."*

*"I take a break for a long time and binge watch... I try to connect with the story sometimes."*



## Escapism // Reality

70%

Gen Z are inclined towards watching old movies/shows as they think that they are **feel-good** and rewatch due to **familiarity**.

59%

Gen Z are inclined towards watching old movies/shows for **reliving old days and simpler times**.



# Personalisation // Exploration

Gen Zs lead a fast-paced life where they don't have the time to splurge on activities that are trivial. From here, stems the expectation of a seamless and personalized content consumption experience, saving them time.

However, most Gen Zs use shared OTT subscriptions and many a times the app recommendations are affected by the choices of the people using that one account.

Gen Z also tend to watch content based on their mood. Sometimes they consume content that reflects their mood, while at other times, they consume content that is mood alleviating.

The desire to watch content which is different from their mood stems from their tendency to escape and cope with situations by turning to content consumption.

When short on time or not in the right mood to explore, Gen Z turn to app recommendations to choose the content to consume.

Counterintuitively, Gen Z feels strongly about privacy and how companies are using their personal data to be able to curate personalized content.

Ads have become a major touchpoint for all digital platforms and form a crucial part of the consumer experience. Interestingly, while Gen Z expects their world to be highly personalized, **targeted ads makes Gen Z feel queasy and followed**. This might be the reason why more than half of Gen Zs use ad-blocking software.

61%

of Gen Z's call themselves explorers

*"Sometimes I have all the suggestions that come on Amazon Prime... most of the suggestions that comes up is other user watch, which is irrelevant to me. I definitely want relevant movies."*

*"I know I am being followed and my data privacy is being invaded. I tend to clear the cache and reset cookie settings."*

*"I wouldn't say I totally appreciate it. A technology and algorithm that shows you repeatedly what you see continuously, it limits the finding of something new.. I am not saying that I don't like this.. I am ok with this as long as they have a shuffle/reset button, that will fill my feed with something new. This is what I like with Spotify, as they have that."*



# Personalisation // Exploration

61%

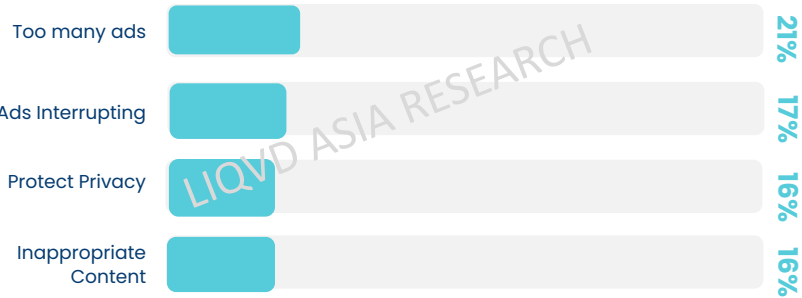
Gen Z said they would feel more comfortable giving personal information if they knew it would be safeguarded

82%

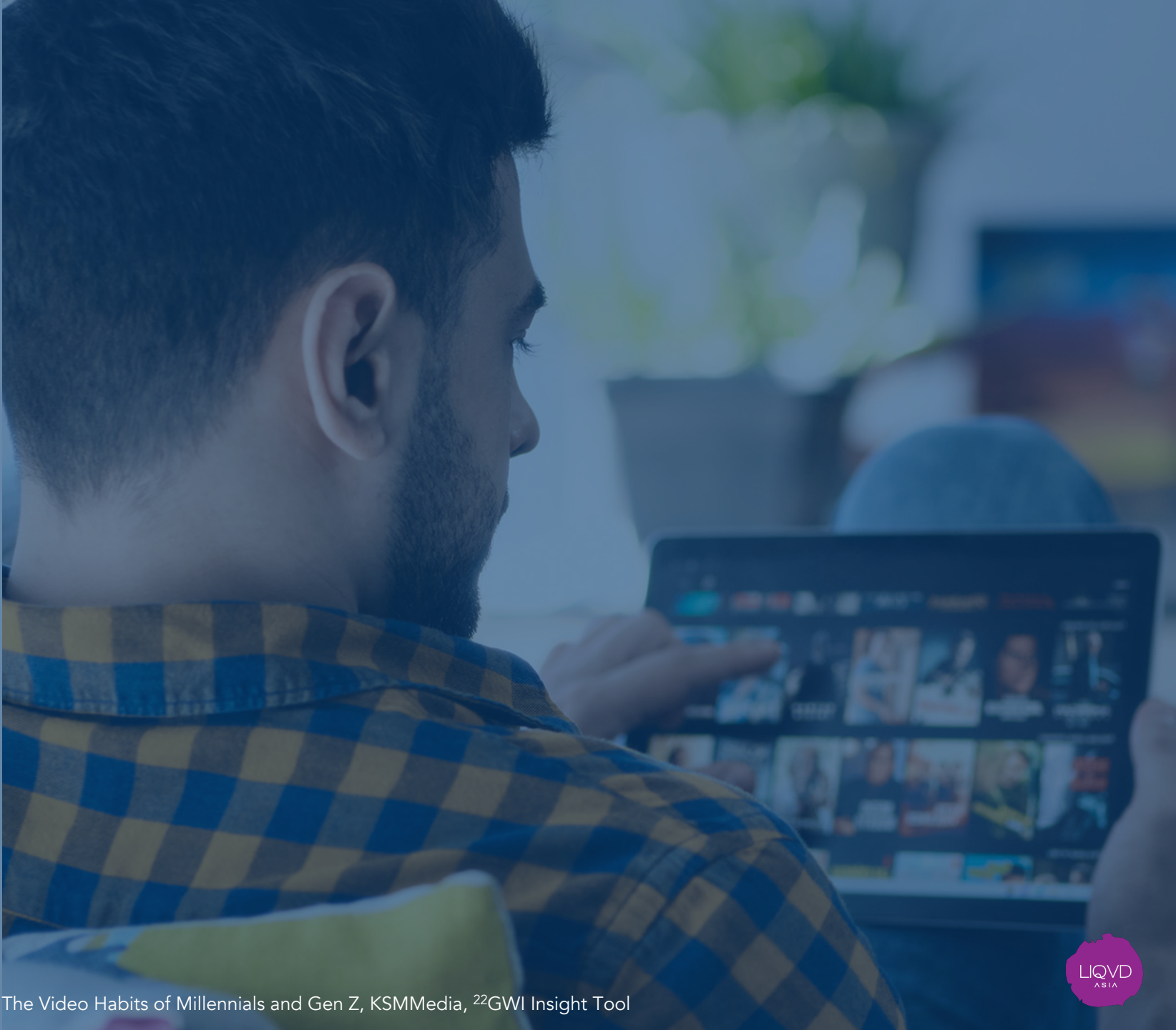
Gen Z admit to bypassing advertising on social media platforms like YouTube whenever they can

## What are the reasons for ad blocking?

% of Gen Z respondents stated top reasons for blocking ads.



Source: <sup>20</sup>IBM, Institute for Business Value, 2019, <sup>21</sup>Beyond Cable and OTT: The Video Habits of Millennials and Gen Z, KSMMedia, <sup>22</sup>GWJ Insight Tool



# Global // Regional Content

The wide variety of global and regional content available across platforms present a tough choice to Gen Z viewers.

Gen Z are updated with the happenings around them and are **influenced by trends and behaviors that are transcending across boundaries.**

With a broadening of their content consumption experience, Gen Z are thus far more likely to immerse themselves in shows developed in various languages\*.

In order to harp on the the popularity of global content, Netflix has been in the forefront with featuring umpteen number of shows across truly global genres like Korean Drama, Anime etc.

While consuming international content has become a trend, there has also been a spike in the consumption of regional content. Users are selecting content based on behavioral shifts and trends.

This has been largely due to the **popularity of Originals or exclusive content with regional themes and practices** being depicted across platforms in India like Amazon Prime, Sony LIV, Voot, and Alt Balaji to name a few.

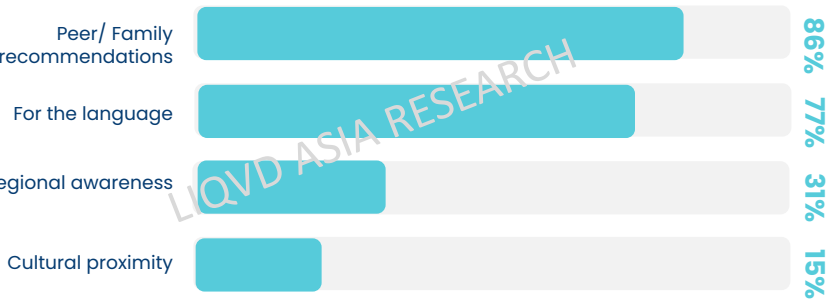
*"Telugu is my mother tongue. Mostly I prefer watching English web-series. I keep deep concentration to know what they are saying.. So, I use subtitles... & focus on what they are saying... The moment I started watching web-series and English movies, and it has been 6 years, I am addicted to them... the English that I am speaking now is because of the web-series."*

*"I like Netflix a lot because it hosts a variety of Korean Dramas and Anime."*

*"I usually watch regional content with my family because my parents don't like watching content in English for other global languages. Also, at times I watch because the memes are trending on SM"*



**What are the different reasons to consume regional content?**  
% of Gen Z respondents stating reasons to consume regional content.



85%

Gen Z prefer viewing OTT for its Original content

Source: Survey Conducted by LA, <sup>24</sup>Indian OTT Landscape, Vidooly



# Me Time // We Time

During the pandemic, while in the captivity of homes with family and work being stagnant, people were forced to shift to digital and rely on content available online for entertainment.

The pandemic also increased the **importance being given to spending time with family and peers**. The habit of consuming OTT video content regularly has persisted post-pandemic and has become an important part of family/friends' time.

However, along with increased We Time, there also has been increased awareness about the importance of taking time out for oneself. Me Time has become the latest buzz on social media and an important and uncompromising part of the day for the younger generation, particularly the Gen Z.

Consuming OTT and video content has **become a part of Me Time**. 87% of Gen Z\* admit to binge-watching with 40% watching six episodes in one sitting on an average. OTT video consumption as a Me Time activity is motivated by either or all of the stimuli namely enjoyment, efficiency, information seeking, social interaction, and relaxation.

Whatever may it be, Me Time or We Time or both, the OTT viewing journey is quite convoluted and different each time. It's interesting to see how the Gen Z are balancing between content consumption alone and in groups.

*"I tend to get involved.. I don't want no disturbance.. because I want to concentrate on it.. even though it is just a drama."*

*"When I am in a happy mood, I grab my family and watch a movie with them. If I am sad, I'd prefer watching alone."*

*"I like to watch the shows I like alone to spend sometime with myself and reflect on my emotions during the day."*

*"Although I like watching movies at home with my family, I can't watch it in a flow. Either my dad wants to take a pee break, or my mom wants to get something from the kitchen."*



# Me Time // We Time

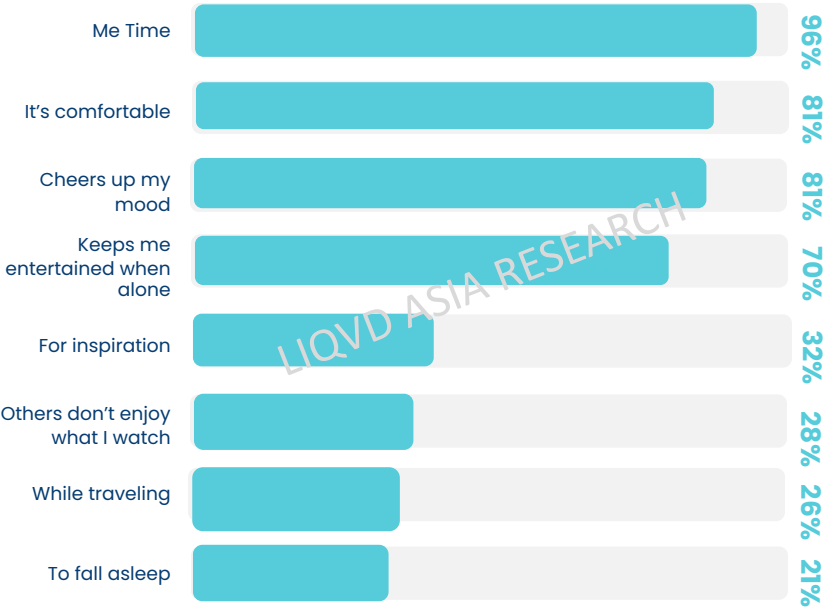
|   | Solo Experience | Shared Experience |
|---|-----------------|-------------------|
| Watching old movies/shows                   |                 | 46% <div></div>   |
| After a tiring day at work/ school/ college | 55% <div></div> |                   |
| While going through an emotional turmoil    | 70% <div></div> |                   |
| Over the weekend                            |                 | 40% <div></div>   |
| Much awaited movie releases                 |                 | 53% <div></div>   |
| During meals                                | 53% <div></div> | 32% <div></div>   |
| Late night watching                         | 60% <div></div> |                   |
| Sports viewing                              |                 | 94% <div></div>   |
| Distraction between work/ college           | 66% <div></div> |                   |

LIQVD ASIA RESEARCH



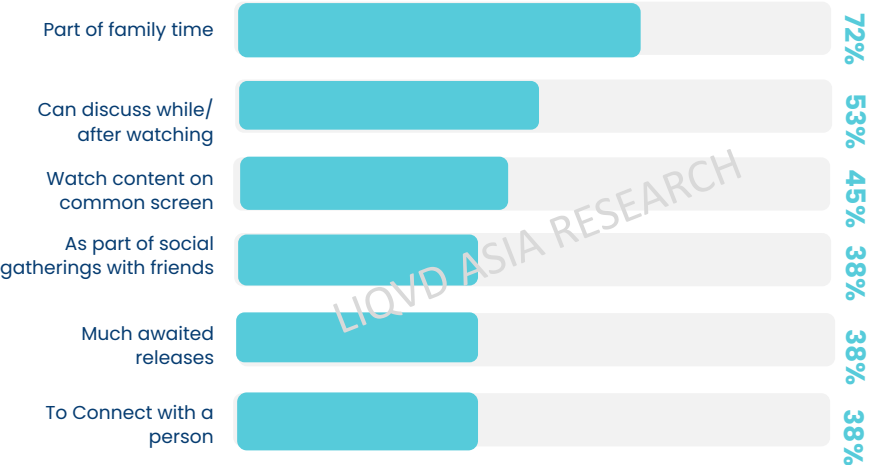
**What are the reasons to consume OTT content as a solo experience?**

% of Gen Z respondents ranked parameters on the basis of relevance.



**What are the reasons to consume OTT content as a shared experience?**

% of Gen Z respondents ranked parameters on the basis of relevance.



Source: Survey Conducted by LA





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# Additional Probes

## 1. Expert Interviews

- Content In Metaverse
- How to gain Gen Z's trust in an attempt at finding balance between personalisation and privacy?

| Representatives for Expert Interview from any of the following brands |            |
|---|------------|
| YouTube   | Zee5       |
| Disney+ Hotstar   | Jio Cinema |
| Amazon Prime Video  | Sun NXT    |
| Netflix   | ALTBalaji  |
| MX Player   | Eros Now   |
| Voot  | BIGFlix    |
| Sony LIV  | Shemaroo   |

2. How Gen Z navigates choice fatigue? How many shows do they watch at a time? How do they sift through umpteen choices?
3. Does Gen Z care about the claims mentioned in event-based movies/ shows?



# 4. CONTACT US

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# FIN.

