



POV

On the Trail of the “It” Generation

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Gen Z (also known as zoomers and digital natives) has been and continues to be the most desirable “get” for marketers. This is not surprising given that this demographic makes up between 26%-30% of the global population, depending on which statistical source on Gen Z you are looking at. That translates to at least two billion Gen Zers worldwide (68.6M living in the US as of January, 2023), and 2020 data showed that this already was the largest generation alive.(1)

Given their size, being a larger generation than millennials preceding them, the interest in Gen Z is fueled by the fact that, despite their younger ages, they nonetheless form “an emerging force of trendsetting consumers who influence the purchasing behaviors of older generations.(2)” Intuitive to add is that this swings both ways, i.e., Gen Z also is, and will be, highly influential to the even younger Gen Alphas as they aspire upwards. Thus, zoomers’ influence extends upwards and downwards, with the stickiness of their attitudes and trends becoming increasingly apparent.

Older members of Gen Z are at the tipping point of just entering adulthood and, with that, graduation from higher education and entrance into the workforce. Thus, collectively, their buying power and influence are only going to grow – no wonder sights are set on this target.

At the same time, though, Gen Z has the tendency to shape shift more than any other generational cohort. As hard as marketers have been making a run toward these young consumers to try to pin them down, they seem to slip the harness – on to the next thing. A Wall Street Journal tech article (April, 2023), talking about AWS cloud service, has a headline that neatly captures this dynamic: “Want to Connect to Gen Z?, You’d Better Move Quickly.”

Just by virtue of their age, there is a trying-on of identities with this demo, as they attempt to find their place in both the general societal landscape as well as in the workforce. They are figuring out the meaning of life for themselves, and it is always changing. Nonetheless, there has been a consistency with respect to certain predominant traits which will be discussed throughout. Additionally, several of their attitudes, interests and concerns already have had a huge impact in the world at large. **The focus of this white paper, particularly where media and entertainment are concerned, is to try and answer two questions: “How does what they are translate to what they do?” and “How does their dynamic and the ensuing trends affect marketing and entertainment?”**



WHO ARE WE TALKING ABOUT?

Generation Z is the first generation of **digital natives**. They have never been without technology, the internet, and social media. These individuals fall within the birth years of 1997 to 2012, making them roughly 11 to 25 years old.

Preceding them is the generation of **millennials**, born between 1981 and 1996 (27-43 years old). These individuals, while also tech-savvy, are better known as **digital adopters** – that is, social media and smartphones emerged on the scene while they were growing up, and they were the first to primarily utilize the new technologies. Another term for them is digital pioneers.

While millennials also know their way around social media and the digital world, it is Gen Z for whom it is indigenous, the group that has really run with the technical life, grown it and refined it. Underscoring this is that Gen Zers use handheld communication devices and accessories as their predominant means of communication, and for learning about and exploring the world.

Overlapping neatly with the tail-end of the Millennial Generation and the beginning of Gen Z is a micro-generation of young people, labeled **zennials** (or zillennials by some). Born between 1993 and 1998, their age range (25 to 30) places them closer in their sensibilities to Gen Z compared to the older and aging portion of the millennial segment. To keep in mind is that generations are typically on a continuum, so those on the cusp of a bordering generation, such as younger millennials, can be expected to exhibit the same values as Gen Z, though perhaps not at the same strength or extent.

Overall, what makes zennials important is that they have a foot in both generational camps, experiencing a massive shift in technology during their formative years. Some articles describe their world as having changed before their eyes. They perhaps can be considered as having led the “adopters” charge among millennials. With that idea of continuum in mind, zennials, while strongly embracing digital technology, also value in-person and analog experiences. In further consideration as a bridge over to Gen Z: “They are driving the shift toward more authentic, socially conscious and creative content. (3)”

The bulk of research concerning the younger consumer demographic most often simply comes under the heading, “Gen Z.” However, adding the zennial segment produces the overall age targets of 18 to 24/18 to 34, which are so important in media, television, and movie objectives. This expansion not only helps to better refine a generational time span, but ensures an examination of like individuals who have experienced major societal events in meaningful and similar ways.



We are labelling this expanded and richer Gen Z totality as Gen Z+. For our purposes here, to note is that whether we use the terms Gen Z+, Gen Z, zoomers, or audiences/targets falling between the age range 18 and 34 we are talking about the same thing – everyone’s same desired target.

Back to the why behind the push to “claim” GenZ+/Gen Z. It is generally predicted that, as a totality, this generational cohort will have huge spending power by 2026. At times, Ad Age has referred to Gen Z (Gen Z+) as “the future of data.” As they come into their own as consumers, employees, and citizens, getting a grip on the quirks and preferences of this generation has the potential to provide the advantage in speaking to them.

“This group is claiming their influence on the world sooner than any generation before, wielding their power to effect change, drive new trends, and hand up their ideas to the rest of us.(4)”

THEIR DEFINING CHARACTERISTICS AND HOW THEY APPLY

So, what are the key traits, attitudes and habits defining our core segment? First and foremost, the central (and well-established) demarcation is how Gen Z has come of age after the internet explosion, where digital has been firmly ensconced in their lives:

“Social media, constant connectivity and on-demand entertainment and communication are innovations millennials adapted to as they came of age. For those born after 1996, these are largely assumed...they have grown up in an always-on environment.(5)”

With this comes a deep understanding of not only how to communicate digitally, but a proficiency in online content consumption, important as they go about carving their own paths. Being so versed in social media, they use it in a unique way. Three in ten among zoomers say they use social media as a place for inspiration on pretty much everything. Social media serves them as a search engine for information, advice, finding new brands, and in seeking answers on anything from beauty trends to finances. (6)

Their favored platform? – TikTok (Instagram second, though used more by teens). Growing up in an age of rapid innovation, Gen Z is right at home with the mobile era of YouTube, TikTok, Instagram and any content consumption platform that may come. TikTok has assumed a place of importance, not only for content creation and viewing, but as a replacement search engine over Google. Gen Zers tend to see TikTok's results as less biased than Google's, like the interactivity, and the speed at which the videos deliver information. A New York Times article posited TikTok's rise as a discovery tool as being part of a broader transformation in digital search, and explained:



“More and more young people are using TikTok's powerful algorithm – which personalizes the videos shown to them based on their interactions with content – to find information uncannily catered to their tastes. That tailoring is coupled with a sense that real people on the app are synthesizing and delivering information, rather than faceless websites.(7)”

Being brought up on texting and quick video spurts leads to a tendency to want both **brevity and visual stimulation** in all that they do, whether it be how they are advertised to, or in the entertainment they consume. In fact, the latest Trendera forecast report cited brevity as one of the priorities for consumers, in general, when it comes to choosing entertainment; additionally, TikTok was perceived to be more interesting than TV or movies.(8) Applicable to doing research with them, Women in Research (WIRe) advises administering a survey of quick hits rather than lengthy questions, with text messaging effective in “reaching them where they are. (9)”

Further, videos or motion-specific content are more eye-catching and contribute to a sense of authenticity for brands, and film or TV. One source predicts that Gen Z is likely to redefine social media via its desires for **genuine content** and **authentic connection** as constructs for meaningful online interactions.(10) Indeed, younger consumers' use of LinkedIn has been growing, viewed as a more positive platform and helpful in gaining professional outlooks and advice. Another note is that 4 in 10 of Gen Z consumers prefer stories, reels, or TikTok videos when seeing ads.(11) Some sources paint a picture of Gen Zers as storytellers at their core, which is an integral use of TikTok.

Showcasing the interplay between generations, although most Americans on social media are between the ages of 18 and 29 (our “Its”!), the number of individuals ages 65 and older on social media has been growing: 21% in 2014, reaching 45% in 2021. The pandemic first kickstarted the older demo's interest in TikTok, during which they started accounts for distraction and as a means of having fun. Those with more proficiency in technology realized that created content could be their way of providing their own “authentic” voice and gaining followers in the world (e.g., The Retirement House is one of these accounts produced for TikTok, currently with 5.1M followers):

“Authenticity sells – to the tune of millions of dollars. Brands are taking notice and are working with older influencers or ‘granfluencers,’ as they are affectionately known in the industry. (12)”

In addition to the growing prominence of authenticity for our target, in addressing other attitudes, emotions and values very salient to realize about our Gen Z+ is that global events have played an important part in shaping their view of the world, either through personal experience or through exposure to a wide range of issues via social media. Based on a list of influential events for the generation, terrorism and war placed first (social networking was second; smart phones/Mobile First were third). The article presenting this finding went on to talk about Gen Z growing up in a time of turbulence and instability (both political and financial), where disruption and change have been the norm. (13)

Coupled with the open and on-going debate about the effects of social media on mental health (beyond our scope here), societal and cultural events have created an anxious generation, focused on comfort, growth, and their well-being. Figuring into their unique usages of social media, a third of the Gen Z contingent says they are using social media to search for information and solutions relative to their health and wellness (for good or for ill). (14)

On the wider global front, although ambition is one of their traits, social equality and individualism nonetheless are among core values for zoomers. Leveraging their voices via their digital fluency, they tend to be more accepting and open-minded compared to previous generations and, in caring about the world, are eco-friendly and socially responsible (supporting social movements like BLM, climate change and transgender rights).

Gen Z+'s diverse views on the world are reflective of the fact that they comprise the most ethnically diverse generation in American history, eclipsing all other generations before them in embracing diversity and inclusion. Almost half of Gen Zers are minorities. (15) As a result, they go farther in valuing diversity – they demand it.

Thus, overall, when considering this generation, emotional metrics cannot be discounted. Gen Z tends to be pragmatic (growing up during a recession); ambitious (gravitating toward entrepreneurship); they make decisions based on personal values; and they place importance on perceived trustworthiness, which goes hand-in-hand with that searched-for authentic quality highlighted earlier. Whereas millennials in total also like authenticity, Gen Z+ takes it to a whole new level, seeking brands and products that mirror their ideals. (16)



We can summarize that what Gen Z is after are personalized, authentic, and entertaining experiences:

- on social media
- in advertising (where messaging needs to be direct)
- and, by extension, in their viewing options.

Additionally, an especially important value for Gen Z as we emerged from the pandemic is fun, which also plays a part in how they want to be entertained.

Thus, it is key to understand when trying to reach them that Gen Z accesses and approaches brands differently and, in fact, thinks differently. In short, they bring completely different preferences, perspectives and expectations to the media and entertainment arenas.

ENTERTAINMENT AND GENERATIONAL INFLUENCES

It has long been recognized that the distinct characteristics, values, and attitudes of a particular generation go on to influence society and culture at large. What catches the imaginations of a said generation, what takes hold in its milieu certainly play a part in helping to define the respective generation, as well as future cohorts. As example, Dungeons and Dragons not only captured minds in its heyday, but its strength has gone on to shape current successes such as Game of Thrones and Stranger Things. Indeed, Game of Thrones (2011-2019) brought about the beginning of mega-budget TV.

Homing in on what makes Gen Z+ tick, TV and film have taken advantage of the demo's most salient traits – notably their digital prowess and relationship with technology -- to create marketing tools and hooks. Both outlets have leveraged memes via social media and have inspired participatory trends for the purpose of promoting interest in, and involvement with, their projects. Recent examples are the dance and antics from M3GAN, and the music and dance from Netflix's Wednesday series.



Harnessing more of what garners enthusiasm from Gen Z is to bring in their love of the visual and the experiential. To this end, Netflix unleashed a robotic Thing, Wednesday's partner in crime in the series, on the streets of New York during launch in 2022. The video clip, released on Twitter, was used to hype the series, and showcased Thing's interactions with people (predominantly startling them). The clip showed the hand performing such feats as skateboarding and riding the subway – to the delight of fans, but also to engender surprise and a "what's going on?" reaction from viewers, generally. True, the property itself had to be good, but not to be discounted in the success of the Wednesday series was how well the advertising took hold, with the show now one of Netflix's biggest titles of all time, fueling the desire (and the green light) for a second season. In a similar manner, marketing for Stranger Things included a 3D billboard in Times Square for season 4 in 2022.



A KEY DISTINGUISHING TRAIT/ PERHAPS THE SECRET INGREDIENT?

As media and entertainment are catching on, what really sets our young demographic apart is that one activity overrides others – namely **Gaming**. In 2021, a journalist's report on results from a Deloitte survey of digital media trends among Gen Z consumers stated, "Generation Z displays strikingly different entertainment preferences than older age groups... video games are their No. 1 entertainment activity – and watching TV or movies at home (it was still the pandemic) comes in fifth...about 26% of Gen Z said video games are their top entertainment activity, and 87% of those in the age bracket said they play video games daily or weekly.(17)" In contrast, out of the 16 listed categories, movies/TV shows was the overall favorite among older participants (Gen X and boomers).

Gen Z's (taking in younger millennials, too) predilection for video games was apparent even then, and predictions were for it to have long-lasting ramifications for the media business as a whole. This seems to have borne out, as video gaming has grown so much more, both as a hobby and industry. Further, Gen Z+ as a totality is less inclined than older ages to seek broadcast and movies as a way of engaging. Gaming's appeal? It seems to be mainly about using this entertainment medium as a chance to be fully immersed in another world and, additionally, as a means for socialization and interaction.

Worldwide growth has progressed steadily from 2.03 billion video gamers in the world in 2015 to a current 3.24 billion gamers in 2023; projections are for 3.32 billion in 2024.(18) Of the 227 million people in the US who are gamers, the largest demographic is our Gen Z+ contingent of 18–34 year olds, at 38%.(19) One source cites that almost nine in ten of Gen Zers play games on any device, particularly using smartphones. (20)

Again, illustrating how Gen Z traits have filtered through to other age groups, older consumers have taken to the pastime, as well, feeling that it is time well spent. According to AARP, gamers 50-plus now number 52.4 million strong, representing 45% of people ages 50 and over. There are a range of reasons for their gaming, including to be challenged and stay mentally sharp, but 86% have reported they do so to have fun; 79% for relaxation.(21)

The net finding: gaming is one of the fastest growing, as well as the largest segment of the entertainment industry today. Aha, the game is afoot...



GAMING'S STRENGTH BECAME APPARENT IN TV AND FILM IN 2023

Theory has it that video games are the new comic books in the world of TV and film.(22) **The inflection point came with *The Last of Us* on the television side, and *The Super Mario Bros. Movie* on the film side.** Both seemed to hit at the right time, with the right subject matter, and with an optimal execution.

Based on the acclaimed 2013 PlayStation video game, *The Last of Us* was named Gen Z+'s favorite currently-airing TV show in 2023, with digitaltrends describing it as "arguably 2023's biggest television phenomenon." This demonstrates just how powerful mixing gaming and entertainment can be. Not only did the show stay true to the video game characters, but it stayed true to its source material in its original PlayStation form. Additionally, the young demo likes the cast of the show (led by Pedro Pascal). With the right ingredients, then, this cohort can take a detour from their favored binge viewing to settle in for weekly cliffhangers. *The Last of Us* was marked as "the big return of the weekly release.(23)"

The scope of *The Last of Us* video game proved to be ideally suited to a series format, and the show (initial HBO Max run January, 2023 to March, 2023; 9 episodes) has been considered successful at finally cracking the code of what had previously been the "videogame curse" when it came to big-budget video game adaptations. That is, the series successfully turned action into drama, maintained tension and horror, and successfully translated the interactivity of games into the linearity of the film format.(24) Other factors which did not hurt were that *The Last of Us* videogame has been called one of the most cinematic video games ever created, and that the series offered the opportunity to expand on some of the characters' backstories and relationships, satisfyingly fleshing out the overall story: "The show is true to the game – true to gaming in general, really – in a sense deeper than simply strict adherence to the original plot.(25)"

The Last of Us has become the most watched show in HBO Max history (based on a combination of Nielsen numbers and first-party data from Warner Bros. Discovery), and received a 96% Tomatometer score. Critics consensus on Rotten Tomatoes is: "Retaining the most addictive aspects of its beloved source material while digging deeper into the story, (the show) is binge-worthy TV that ranks among the all-time greatest video game adaptations." A real marketing coup, *The Last of Us* game sales increased dramatically with each new episode of the show.



Arriving on the heels of the big win on the TV front came ***The Super Mario Bros. Movie***, which has turned out to be one of the juggernauts of 2023. Following its five-day domestic debut (April 5-9, 2023), headlines were already anointing it as likely to be the biggest release of 2023; by the end of April there were descriptions of the *Super Mario Bros.* as "Box Office Gods." From an opening weekend domestic box office of over \$146M, the movie has generated a domestic gross of close to \$600M to date (second only to *Incredibles 2*, 2018 if measuring animated box office), and over \$1.3 billion WW (beating *Incredibles 2* on this front).

In 1993, the previous *Super Mario Bros.* was the first adaptation of the most famous game of all time. However, the visual look and feel, the characterizations, and the film's overall execution were all wrong to gamers, and its overall performance was not deemed stellar. Thirty years later *The Super Mario Bros. Movie* came along to shatter expectations and all records. This "Super Mario" seemed to hit all the sweet spots, helped along by a strong, well-received cast and a shining execution which drew strong ties to the game.

Culling statistics from a variety of sources, The Super Mario Bros. Movie broke the record for opening weekends for both videogame adaptations and animated films; it scored the biggest global opening of all time for an animated film; by the end of its second weekend, the movie had become the biggest videogame movie ever. That the film was still going strong by its fourth weekend signaled to several in the industry it was now officially “game over” for that dreaded videogame movie adaptation curse.

A strong contributor to the film’s blockbuster success was that a wide swath of people ended up going to see it, and saw it more than once in the theater. In fact, right on opening weekend, PostTrak (26) reported that three in ten of moviegoers 18 to 34 expressed interest in watching the movie again in a theater. Post-opening weekend, in its movie news, the Hollywood Reporter gave its version of the film’s secret sauce: “The PG pic is drawing both families and general audiences, reflecting the appeal of the wildly popular multi-generational game. On the general audience side, a whopping 60% of ticket buyers were ages 18-34.”

The most succinct summary of why The Super Mario Bros. Movie has performed, indeed out-performed (and despite initially mixed reviews), is that the movie:

“Is bright, colorful, and filled to the brink with Easter eggs and references that pay homage to more than four decades of Super Mario games. Additionally, the movie also finds clever ways to nod at other beloved Nintendo properties. (27)”

Additionally, and likely helped along by the success of The Super Mario Bros. Movie, there seemed to be increased interest, as well, in movies about the process of how videogames are developed and stories of their rise in popularity. Witness the critical success of Apple TV+’s Tetris (of Nintendo fame), which one Screen Rant headline in yet another proclamation vowed was now final (final, final?) proof that the “game adaptation curse” is dead. The lead performance (Taron Egerton) lent cachet, and the movie generally was felt to be a fun ride. Added to this, the movie went beyond typical biopic in being full of nods to the video game industry.

Learning from the above, it seems that in order to attract a large pool of gamers – heavily comprised of our Gen Z+ contingent -- the trick is to have resultant TV and movies **really align with the respective games themselves, as well as to be true to gaming conventions.** One thing going for gaming-focused

properties, which are typically recognizable franchises, is that audiences generally go in with expectations of what they are going to get in terms of both the material and recognizable characters (an aid in overcoming the difficulty these days in attracting audiences to original movies). However, potential and profitability fall off if a movie or show is made without a clear understanding of the source material, and without satisfying the built-in core audience (gamers) who are the needed first thrust.

WILL THIS BE A TREND? /WILL IT HOLD?

In recent decades, video games have hosted a lively series of debates about the very nature of the medium and the implications for its critical potential (remember the “curse”). A number of game-based TV and film properties over the years have not totally lived up to either their potential, or to the seemingly necessary factors of faithfulness to the source and delivering a solid, coherent story. Moreover, within previous successful franchises, (e.g., Resident Evil, Final Fantasy), although they may be high-grossing in the main (especially Resident Evil), some entries were stronger in perceived execution/performance than others, and some have been reviled by gamers.

Thus, now that we have witnessed strong interest, and been given a taste that videogame adaptations can work – and work very well – the question becomes what can be expected going forward. Will audience (gamers in the lead) interest and viewership hold for videogame-based content coming down the pike? Will there turn out to be enough successes to consider that we have a “trend”? There is hopeful evidence.

Fans are already curious about what a second season of The Last of Us will cover (projected premiere to be 2025 at this stage), with the guesstimate that the show will adapt the video game sequel, The Last of Us: Part II. From what already has been speculated about a second season, perceived success is predicated on 1) round two again being true to the rules, i.e., continuing to follow the game’s plot closely; and 2) maintaining satisfying treatment of the characters (the second installment of the game itself received criticism regarding character treatment). It’s now wait-and-see whether a second season can at least meet the massive success of season one.



Sonic the Hedgehog 3 currently is slated to release in December, 2024. Sonic the Hedgehog 2 (release date April 8, 2022) was an entity that captured the spirit and feeling of the game, resulting in a successful performance. Added to this, the movie had charm and humor, and similarly playful and fun elements as The Super Mario Bros. Movie. Sonic the Hedgehog 2 opened domestically to \$72M, with a worldwide box office of \$405M. At the time, Sonic 2 became the highest-grossing video game film in the US until The Super Mario Bros. Movie overtook it. Although a family and animated movie, nonetheless according to PostTrak, 46% of the opening weekend audience for Sonic 2 was between 18 and 34. Since Super Mario did so well, can we assume, riding on expectations and a whetted appetite for the product, that Gen Z+ will be showing up for Sonic's third installment?

Minecraft: the Movie, with a release date of April, 2025, is another upcoming game-based movie. With no promotional material available, little is known about it thus far beyond Jason Momoa in the starring role. The game itself has never been about plot and there is no real story within, but it does have some distinctive locations by which to draw an audience. The movie will require a substantive plot to engage Gen Z, and the game's open-world building and survival strategies, if enjoyably translated to the big screen, might effectively be on point regarding this audience demo's desire to be immersed in their entertainment experience while having fun.



ADDING ANOTHER ATTRIBUTE TO THE MIX

An additional attribute important in understanding the young demographic, and already an influence in media and entertainment, is their penchant for nostalgia. The idea of nostalgia colors every generation. However, what is surprising about Gen Z "is how they leverage social media to play into nostalgia; they can bring back products and brands for the cool factor and to revitalize the brand. (28)"

Zoomers are 19% more likely than other generations to say they prefer to think about the past rather than the future. The why of it? For them, this is less about reliving their past, and more about harking back to what they feel was a simpler time.(29) Borne out of the unease of a global health crisis marred by recession, they seem to have found solace in the 90s and early 2000s.

The young set's fondness for the past is prevalent in music (notably from the 90s), but more so in their fashion preferences, where nostalgic trends (revived on TikTok) have been shaping consumer behavior. Overall, journalists have been taking notice and have realized that "Gen Z is making waves in the world of fashion and there is no way to ignore them. (30)"

Not to be overlooked is that Gen Z's gaze backwards has extended to adopting some old-school behaviors, as well, such as the budgeting method of dividing earned income into envelopes for varied uses and products like flip phones. In general, this cohort has the power to revolutionize throwback approaches.

In the whole throwback realm, what is ironic is that zoomers have "bonded with one another over social media over the search for a simpler, pre-social media era.(31)" This reinforces Gen Z+ as both trendy and timeless (which most generations have not been), looking toward the future but surprisingly old-fashioned.

ALONG COMES BARBIE (IN HER OWN MOVIE, NO LESS)

This desire of Gen Z to return to a simpler time, if only momentarily, can be understood as part of the younger generation's overall search for, and attempts to hone who they are and want to be. Further, in assessing these trends we can see how movies and television, along with social media, are strong influencers in launching and setting them. Taking a page from the nostalgia trend, our totality,

Gen Z+, has its fingerprints all over the seemingly never-ending craze that has surrounded the Barbie movie, both pre and post-release. The film incited not only a look back to an earlier time, but one rooted in their own childhoods; as well, it distinctly tapped into, and delivered on, the desires for fun and levity. Prior to the film's July 21, 2023 release, one breezy online headline predicted: "This summer's forecast: pink, with a 100 percent chance of Barbie."



But first there was the egg (or was it the other way round?) – the Barbiecore craze. It began early. The color pink was suddenly everywhere. Pink, in all its variations and hues, first gained a stronghold in couture in 2022, with the pink phenomenon on the rise ever since; Barbiecore on TikTok generally has been a big trend over the past few years, which helped to set the stage for the Barbie movie in the months leading up to its summer 2023 release:

“With many nostalgic for simpler, sunnier and more carefree times, it only makes sense that the 80s inspired unapologetically pink aesthetic is taking center stage as the ‘it’ style of the summer.(32)”

Pink and Barbiecore flooded the cultural zeitgeist, allowing Gen Z to embrace traditionally feminine and “girly” styles – the nostalgic aesthetic of an earlier time – while maintaining relevance by channeling female empowerment, and promoting self-expression and body positivity.

Barbie the doll, of course gave rise to the trend. When the doll hit the market in 1959 it was marketed directly to kids, a tactic not tried before. Her strength as a brand – indeed, having reached the icon pantheon – comes from her aspirational appeal and female empowerment messages. Just as Barbie could be anything, so could you. Not only that but Barbie has enduring multigenerational appeal and celebrates diversity, qualities which nicely dovetail with Gen Z's mindset in these areas.

Having the lead character and her cachet/importance entrenched in the public's mind allowed for several marketing strategies to be employed ahead of, and for ushering in the movie. For example, on HGTV there was Barbie's Dreamhouse Challenge; a Food Network episode of Spring Baking Championship in June featured a challenge dedicated to Barbie-themed desserts; Progressive Insurance was out with a Barbie-themed spot. Added to this was World of Barbie in Santa Monica, CA, an interactive exhibit where attendees could immerse themselves in the Barbie lifestyle. Overall, social media phenomena grew outside of and beyond Barbie the doll and Barbiecore to take over all aspects of commerce and culture for a significant run, decidedly whetting the public's appetite for the movie.

Marketing surely had its day with the Barbie movie, and proved to be incredibly impactful. In fact, a Vox article headline in July, 2023 asserted: "This summer's biggest hit? The Barbie marketing team." Additionally, one journalist's throwaway line about the movie was that it was "fueled by a marketing campaign so large you can practically see it from outer space."

Right from the outset, the release of the first trailer for the film had viewers not only tuned into the pinks, blues and sunshine yellows of Barbie mythology, but a glimpse of Barbie and Ken's neon yellow rollerblades set off a frenzy to own them. Some have called the advertising self-aware and modern. On social media, people were noticing and dissecting the tiniest details in the advertising materials. In the trailers and TV ad spots, the way "Barbie" (Margot Robbie), held the steering wheel with her bent arm grazing her forehead, just like a true doll would, sent fans into overdrive in exclamations of how cinematic these details are and feelings that actual cinema is back. The article reporting these findings(33) included some fans' tweets that underscored their delight: "The smallest detail but is so CORRECT oh this film really is about to EAT;" "I'm not joking when I say everything that comes out about the movie makes me wanna frame it in my apartment."

What were the pundits concluding over a month away from the film's release?

"Early box office predictions have Greta Gerwig's Barbie outperforming Christopher Nolan's Oppenheimer, both due to be released July 21...Initially it was expected that Oppenheimer would be the clear winner, but Barbie has become a social media phenomenon in recent months.(34)"

In terms of the movie itself, there were several compelling components to provide traction. The Barbie movie offers an original story that sees Barbie dragged from her fictional universe to deal with real life issues. Its appeal does not rest solely on liking the iconic doll, but that it has something intelligent and complex to say regarding life and philosophy in issues such as feminism, mortality, the nature of perfection, and the theme of appearances vs. reality. Further, there is cleverness in the way that imaginary characters cross over into modern day

America. Also helping to engage, particularly with how Gen Z likes layered humor and satire, the movie is clever again in its send-up of Barbie dolls and in poking fun at her creator, Mattel. In all, the visual allure of bright colors, distinctive atmosphere, and a recognizable ensemble cast all served to deliver "a fresh and entertaining take on everything that's made the property successful.(35)" Additionally, the countless jokes and Easter eggs (referencing both other movies as well as familiar doll properties) are elements known to work well, generally, in engaging an audience (which they did similarly in The Super Mario Bros. Movie). This is all Nostalgia+ for our Gen Z+, and helped to ensure they became and remained tickled pink by the movie.

WELL, HOW DID SHE DO?

Which brings us to performance, the numbers. Did the hype deliver? In a word, "Yup." Indeed, Barbie's numbers have entered the moviegoing Hall of Fame, with consensus that the film is enshrined as a dazzling success. Some pertinent stats:

- Opened to \$162M domestically, and remained the #1 movie for four consecutive weekends and in the top five for more than two months.
- Landed as one of the biggest starts ever for a non-franchise movie.
- Biggest opening weekend for a film directed by a woman, and the highest-grossing film directed solely by a woman.
- The highest-grossing movie of 2023 (\$1.4 billion WW, with The Super Mario Bros. Movie #2, at 1.36 billion WW), and the 11th highest-grossing movie of all time in North America.
- The biggest worldwide release of 2023.
- Warner Bros.' highest global earner ever.



Part of the film's success is that it attracted repeat moviegoers. In July, 2023, some industry posts estimated that 12% of ticket sales were people going back with friends and family to see it again. This level of engagement was mirrored in PostTrak's opening weekend data on Barbie, which reported that nearly half (46%) of core 18-24 year olds said they would watch the movie again in theaters, holding fairly steady at 43% in this age group in the film's second weekend. As a moviegoing pattern, the Gen Z crowd typically goes early to see a film -- i.e., opening weekend -- with attendance dropping off fast. Barbie delivered more staying power. Drawing the Gen Z+ contingent as a whole was that the movie looked fun and entertaining (65% among 18-24 year olds; 56% among 25-39 year olds).

The perceived fun and entertainment to be had was enhanced by what the Barbie movie's issues and themes had to offer. A throughline in Barbie is her search to find her purpose in life which, for Gen Zers, is a striking chord. This age group is coming to terms with what really matters for them, and they can take a sense of ownership in the subject matter. Overall, the Barbie movie exploded the cultural meaning of Barbie the doll, and supported this by originality and a resonating storyline. Barbie proves that moviegoers -- here we slot Gen Z+ -- are still interested in leaving their couches for quality films, particularly if they perceive a unique experience.

The cultural cachet and the film's performance gave Hollywood confirmation and a much-needed boost that movies can still draw an in-person audience. Both Variety and The Wrap reported in August, 2023 that nearly a quarter of those that saw the Barbie movie had not been to the theaters since before the pandemic. Along with this, a Quorum survey found that Barbie was successful in bringing another group, sporadic moviegoers, back to theaters.

A RISING TIDE CAN LIFT ALL BOATS...

At least if it's a phenomenon. The juggernaut that is Barbie was more than a bit player in the success of Oppenheimer, which also was released on the July 21, 2023 weekend. Along with Barbie, Oppenheimer drew hype as "one of the most anticipated films of the year" and, as a standalone, the movie has offered its own cachet: a well-respected director in Christopher Nolan, a star cast, and stellar reviews to buoy its hype. In all, the movie far out-performed expectations for a period drama that is three hours long and "talky."

Oppenheimer opened to \$82.5M domestically, ranking it among the biggest opening weekend ever for an R-rated release. Its world-wide gross to date of \$957M, places it third on the list of highest-grossing movies for 2023.

Barbenheimer is a fan-created term for the same day release of the movies Barbie and Oppenheimer. What was at first taken to be just a meme became a cinematic event, being as much an internet creation as it was a Hollywood phenomenon. At first glance, the audience overlap is not clear, but pitting one film against the other developed its own hype, perhaps because there was perceived humor in the stark juxtaposition of the tone, styles, and subject matter of the two films.

In any event, the hype took on a life of its own. Movie lovers, zoomers among them, leaned in to the social media frenzy by planning back-to-back screenings of the two films, with many dressing the parts for each movie. Barbie and Oppenheimer as a pair became successfully marketed and sold as a must-see event whereby one did not want to miss out on the experience or be left out of the conversation. Barbenheimer even went global: a 28 year old female in Buenos Aires was quoted as explaining, "It's a once-in-a-lifetime experience, we couldn't possibly choose between them." (36)



Not only moviegoers leaned in, but cinemas joined in on the excitement, offering movie-themed refreshments, themed photo booths, and, in the case of one theater in Texas, a free movie ticket to be redeemed at a later date to patrons who watched both films on opening weekend.

The National Association of Theatre owners reported that 200,000 moviegoers bought tickets to see both Barbie and Oppenheimer prior to these films' opening weekend:

"The cultural craze known as 'Barbenheimer' worked to fuel the biggest collective box office weekend of the pandemic era, as well as the fourth-biggest overall weekend in history...(as per Michael O'Leary, president and CEO of the National Association of Theatre owners): 'Studios gave audiences two uniquely different, smart and original stories that were meant for the big screen. People recognized that something special was happening, and they wanted to be a part of it. (37)'"

Barbenheimer has turned out to be not just a one-weekend phenomenon, but a box-office (and awards) push of its own that remains on-going – a boon for both films. Josh Goldstine, Warner Bros. President of Worldwide Marketing, interviewed on The Town podcast with Matthew Belloni (July 26, 2023), expressed the studio's pleasant surprise at how the Barbie brand connected with such seismic impact, and how the organic and dynamic way Barbenheimer came about went on to exceed marketing expectations. Goldstine, talking about Warner's Barbie, also offered that engagement and defying expectations were ways a film could succeed in a digitally connected world. In his view, touchstones for the movie's ability to stand on its own were that it built curiosity (and this applied to Oppenheimer, as well), was "disruptive," provided a narrative that touches deeply, was emotional and also funny in unexpected ways. The movie's/Barbenheimer's scope was broadened into an event, making it urgent and important. For him, bold, brave choices "is the future of how the movie business will continue to matter to the culture in a really exciting way; great stories will always find an audience."

Another executive, Robbie Brenner, president of the Mattel Film Division took up the banner of Barbie's singularity and originality in her interview on the Don't Kill the Messenger podcast with Kevin Goetz (October 18, 2023). Brenner added the "sticky" quality of the film as a plus, and that "you have to have something that's really on the page" (i.e., a good script), as well as delivering emotional and intellectual satisfaction. She praised that the buzz and marketing campaign were so in-sync with the movie that was made.

GEN Z IN THE WIDER WORLD

The trends, behaviors, and attitudes that Gen Z has introduced into media, entertainment and culture here in the US are not limited to our shores. In general, the impact generations have on shaping the social, economic, and cultural landscapes of their respective regions has long been recognized. Even though Gen Z+'s impact is still unfolding, what can be seen is that combining the digital advancements of millennials with the social activism of Gen Z already has produced profound and far-reaching footprints throughout the world.

We can ask if Gen Z is the same everywhere; the answer is: well, almost. In attempting to ascertain how influential Gen Z is and/or will be globally, what looks to be the case is that similar attitudes, views, and trends will likely consistently hold in the west, but that the generation's influence in the east (i.e., China) might be culturally restricted.

A safe assumption is that, within Europe and western-embracing countries (the UK, Italy, Brazil, and Mexico being top markets), media and entertainment can expect this cohort to be consistent with the US in how it currently thinks and behaves, thus allowing similar marketing strategies to be applied. Generation Z in Europe expresses the same commonalities in their respective traits, values, and perspectives as Americans. Further, they also have gone through the same formative events; have experienced financial crisis and social scandals; are disruptive, realistic, and prize individualism; and get behind social causes and sustainability issues. The Gen Z+ population in Europe is a highly diverse one, as well. (38)

China is the number two biggest moviegoing country in the world, on track to overtake the US in the not-too-distant future as the largest consumer of movies in the world. The young generation in China also has grown up in an increasingly interconnected and digital world. In hand with this, they can be considered to have been shaped by a highly connected and technologically-driven society. However – and this is a big however -- China’s strict censorship policies (not only with their citizenry, but regarding which types, which themes, and how much American TV and movie content can be shown there) throws a wrench into totally expecting Gen Z in this country to precisely follow the traits and paths of their counterparts in the US and Europe.

Comparable to their western counterparts, Chinese viewers of American entertainment product tend to be 20 to 29 years old and highly educated,(39) and currently are facing some of the same financial woes as this age segment in Europe and the US. Also, like their western peers, China’s Gen Z makes up a large contingent (400 million strong in the country), and is expected to be influential in all spheres, including business and politics.

In terms of how they are going to view media and entertainment product, though, along with censorship comes an enforced nationalism, which is reflected in a different view of Chinese identity among Gen Z and millennials there. “Made in China” strikes a chord, with these young consumers desirous of seeing their culture incorporated into consumer goods, notably in fashion choices (combining Chinese traditions with modern designs; luxury brands offering Chinese-themed goods), but also influencing their preferences in film and TV. This has been described as “illustrative of the wider effort to redefine China’s identity by tapping into vintage tropes.(40)” To this end, Chinese TV programming and Chinese films lately have been outperforming some American entertainment. This is nostalgia in a different form.



Illustrative of the fall-off in appetite for American product – including for well-loved action films – even Tom Cruise could not revive Hollywood’s former box office muscle in that market. The \$25.4M China debut of Mission: Impossible – Dead Reckoning Part One was 66% below 2018’s Fallout (\$74M). Based on Box Office data for the first half of 2023, a Hollywood Reporter article called this indicative of Hollywood’s new normal in China, i.e., “much smaller hits and far more flops.” Dead Reckoning lost its opening weekend, “debuting in third place behind a pair of holdover Chinese hits. (41)”

Additionally, despite how videogame use is skyrocketing all across the world, with China continuing to gain ownership of game developers and companies and being the biggest market in the world (685 million in China play video games as of 2023 statistics; 97% of 18 to 24 year olds and 90% of 25 to 35 year olds), this zeal does not necessarily connect with movie viewing. A prime example of hesitation, pushback, whatever you want to call it, can be seen in the underperformance of The Super

Mario Bros. Movie in that market against worldwide box office and, for example, that film being the highest performer of any premium format on its opening weekend in a European region like the UK (and to-date gross for the movie in the UK stands at \$68M vs. \$25M box office gross in China). An article in The Wrap neatly summarized the situation:

“After years of pandemic lockdowns and a shaky reopening, ticket sales for Hollywood movies in China have veered between a statistically irrelevant asterisk to just plain underwhelming. With plenty of domestic films to watch, a growing sense of nationalism amid tensions with the West and audiences, whose affections for Hollywood superhero movies seem to be fading, China has been downgraded from ‘most favored nation’ to ‘just another marketplace.’ Hollywood can no longer rely upon China to goose the global grosses of a big-budget Tinseltown tentpole. And that may be just as well, since their streaming apps are shut out of the market.(42)”

The Barbie movie, though, has turned the corner on the market somewhat. While still “underperforming” in China (it opened to \$8M), the movie has gone on to show some powers of endurance (\$35M gross), seemingly having tapped into something that Chinese moviegoers have been more willing to embrace. That is, buoyed by very positive critical scores and strong word-of-mouth, the film “has penetrated the discourse in China, something that Hollywood films rarely do these days...(being) an antidote to the usual male-oriented patriotic action movies that dominate the box office in that country.(43)” Barbie has managed to sneak past China’s heavy censorship, interpreted as a response to societal backlash against women’s rights. In this regard, the Barbie movie has become a trending social media topic, quietly embraced for its diversity and inclusiveness, issues of feminism and toxic masculinity and featuring LGBTQ characters. Additionally, no small aspect to consider is that it is rare for Chinese women to be able to view a quality female-oriented film in theaters.

Yu Yutian, a freelancer in business communication in Beijing, commented on the chord the movie struck with women, even if they had no personal connection to the doll: “My childhood had nothing to do with Barbie...I think everyone’s excitement is more because of the meaning of the content itself.(44)” Via social media in the wider sphere as well as in the Chinese market, it would seem that Gen Z’s value system and cultural concerns are at play. The takeaway: if a film can break through by managing to strike a chord in another market it can do well, highlighting new entry points for Hollywood.

Thus, while gaming in the specific and of itself may not be enough of a catalyst in the Chinese market to transfer over into gaining moviegoer heat, the Barbie movie shows that showcasing universal themes and common experiences are a way in.

In fact, let’s take experiences, generally. Gen Z’s quest for them in a broad sense may also contribute to better audience/consumer success in China, highlighted not by gaming in the specific, but by other technology-oriented ventures. The trending of immersive experiences has generally been noted across several US cities, as well as in London and Mexico City. Various reports talk about how Virtual Reality (VR) continues to rise in popularity in America and Europe, with the technology dominant in China, as well. Most notable is Shanghai’s Sandbox VR, where you can feel like you are living inside a game or movie and experience the immersion with friends. Perhaps the experiential and immersive characteristics of Gen Z+ may prove another key ingredient and more prominently take center stage when decisions about entertainment are being made in China.

THE BOTTOM LINE

To wrap up, whether it be on the part of advertisers, media experts or the entertainment industry, in order to understand and examine any generation it is imperative that their worldviews be understood and that they be met on their own turf. This is no different for Gen Z/Gen Z+. However, what is different is that this cohort brings some traits and expectations that vary markedly from previous generational segments. Chief among the differences is the interconnectedness with social media they have had throughout their lives, along with the singular way the world has presented them challenges and overcomes. What this has set up is a need to be served “more” and served it in a unique way. Thus, in addition to the goal of getting ahead of this generation’s tendencies, it is necessary to not just meet their expectations, but to exceed them. Their excitement, curiosity, and resultant pay-off all require enhancement to be able to declare “success” with this target and to, in turn, shoot for surpassed success.

Big-budget franchise sequels did not revive theatrical business in summer, 2023. Rather, it was **fresh and original fare** led by Barbie (and Oppenheimer), along with the earlier The Super Mario Bros. Movie and TV’s The Last of Us. These all serve as examples of properties that in addition to being fresh and unique (and perhaps because of it), brought **clever elements, strong story and character, very satisfying treatment and, in the case of Barbie, covered some universal, cultural issues in ways that hit with audiences.** All ended up exceeding expectations and, thus, delivered -- including to our core target.



All of the touchstones above continue to be underscored as necessary for box office and/or viewing success, with Gen Z not immune to these factors. However, when it comes to how to engage Gen Z+ to get them to the table in the first place an unavoidable and ongoing challenge is that the generation seems to be a moving target where any one marketing plan is involved. The landscape for them is apt to shift as new habits and trends quickly replace the somewhat older, and marketing has to be on top of them. At the same time, though, certain characteristics of Gen Z (which are part of what distinguishes them from preceding generations) have exhibited a consistency – both in how this cohort views entertainment, and in how social media is utilized and affects them. Three noteworthy traits contributed to the success of the strongest projects these past couple of years:

- The heavy gaming mentality/usage among zoomers was an underlying contributor to the strong performances of *The Super Mario Bros. Movie* and *The Last of Us*;
- The cohort's keenness to embrace nostalgia drove part of the Barbie movie's momentum and its big box office;
- "Event" experiences, launched by TikTok, ads, or social media in general, have culminated in strong pay-off for grabbing Gen Z's attention, feeding their humor and whimsy, and gaining their participation. Presenting them in an extra fun way adds a "plus." These aspects, in particular, paid off when clever and "absurdist" notions were injected into the mix with *Barbenheimer*.

Each of the effective properties was heavily supported by very strong marketing campaigns, which hit on all of the key elements and were felt to be organic to each. Additionally (particularly where gaming elements were concerned), they strongly aligned with mythology, characteristics, and values.

As final ideas to consider, there are caveats in what we have been discussing so as not to be swept away by the strong embracement of, and awe-inspiring numbers for *The Super Mario Bros. Movie*, *The Last of Us*, and the phenomena of the Barbie movie and *Barbenheimer*:

Marketing alone will not get you there. As well, gaming and nostalgia may have their place in a "plan" for going after Gen Z, but the arena is bigger than that. A movie needs to thematically resonate and satisfy on multiple levels in its framework and execution. What we keep returning to, not only for Gen Z+ but considering audiences, generally, is that an original perspective, fresh takes, strong characterizations and stories that align with the DNA of either the over-arching theme or established, embraced products/properties are the essential ingredients. In other words, the movie or series has to be good in its own right.

There is always the impulse to try to capture lightning twice when you have had like product and similar subject matter be strong performers. Warner Bros. is keeping the Mattel momentum going by trying to push forward a Hot Wheels movie, and the Mattel Films branch is hoping to use Barbie's success to jump start its movie ambitions, with several IPs in development based on toys and other properties, including Hot Wheels, Polly Pocket, and Rock 'Em Sock 'Em Robots. Meanwhile, Hollywood questions which toys can realistically become hits; pundits have weighed in that the industry's takeaway should not be to make more movies about toys. To be kept in mind is that not all toys are created equal. Barbie did not work because it's a toy, but because Barbie has multi-generational attachments and is inextricably linked to larger cultural conventions like those of femininity and feminism.

What are we back to then? Gen Z and accompanying audiences want to be offered entertainment that is different, with time and thought spent on execution and getting the subject matter just right; that highlights the unique qualities of the vehicle; and that is satisfying on both emotional and intellectual levels. Having the marketing behind the entertainment capture consumer imagination along with the essences of the properties is of optimal benefit.



Upcoming: our next installment will focus on AI technology, which is continuing to gain a notable foothold in the entertainment industry and has already been labeled a "tidal wave." While debate principally has focused on its place and level of involvement in the more production-oriented areas of television and film, we will explore the ramifications of AI in marketing, audience targeting, and related analysis.

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