

DAY ONE
AGENCY

USC Annenberg
Center for Public Relations



ASK GEN Z

A Deep Dive Into
Gen Z's Scrolls

A MOBILE
ETHNOGRAPHIC
STUDY



Social media's
astronomic growth,
the democratization
of information, and
dominance of mobile
and short form video
has dramatically shifted
how Gen Z consumes
news, and their
definition of influence.

To take a deeper dive into Gen Z's scrolls, Day One Agency went straight to the source, and partnered with USC Annenberg Center for Public Relations to create a special edition of Ask Gen Z.

D1A and USC were most interested in this audience's always-on information consumption habits. So, they forgone fielding a traditional survey, and took it a step further; conducting a mobile ethnographic study asking 34 USC students to log daily video updates about the information they consumed.

The study uncovers that Gen Z's relationship with information consumption has fundamentally changed when comparing their habits to their parents and previous generations. And it's more than where they're consuming media; it's also about what, when, how and why they're engaging with content today.

Our Methodology

The students* were asked to record up to 5-minute videos of themselves across five different tasks over the course of one week.

*Some names have been changed throughout the report to protect the identities of our participants.

TASK #1

Morning Media Audit

During a 60-minute period, keep track of what content you watch, read, listen to, scroll through or interact with. Summarize what content you consumed and then reflect upon how you feel about it.

TASK #2

Information and Influence

Think about a piece of content that has recently changed your perspective and tell us what that piece of content was, how you came across it, and why it was so influential.

TASK #3

Discovery

Take 10 minutes to watch, read, listen to, scroll through or interact with content and narrate your information consumption journey.

TASK #4

Evening Media Audit

During a 60-minute period, keep track of what content you watch, read, listen to or interact with. Summarize what content you consumed and then reflect upon how you feel about it.

TASK #5

Decision retrospective

Think about an actual purchase decision you recently made that was non-routine and required you to find information and compare different options and carefully walk us through the steps of you making this recent, actual decision.

! A WORD FROM THE PROFESSORS

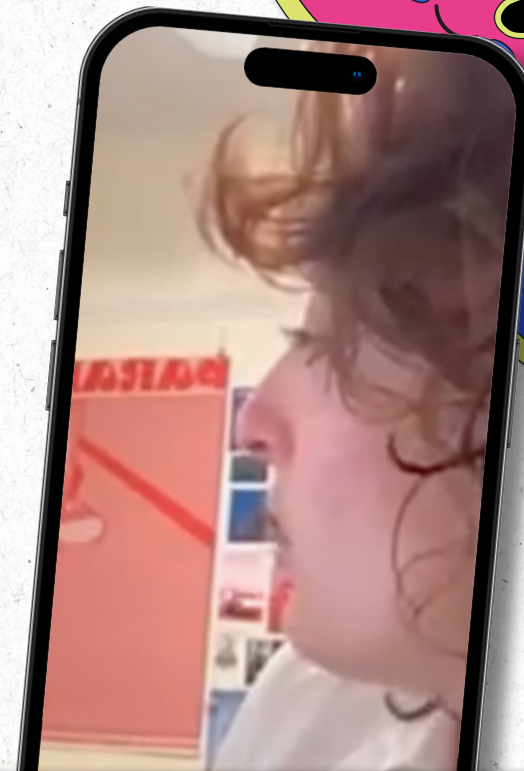
“The mobile ethnography approach we used to dive deep into Gen Z’s media consumption habits allowed us to be a digital fly on the wall. It provided us with an unprecedented glimpse into Gen Z’s dynamic consumption of a diverse array of media content. While other methods rely on recall, we were able to experience their media consumption as it unfolded.”

Professor Robert Kozinets, Jayne and Hans Hufschmid Chair of Strategic Public Relations and Business Communication, USC Annenberg School for Communication and Journalism

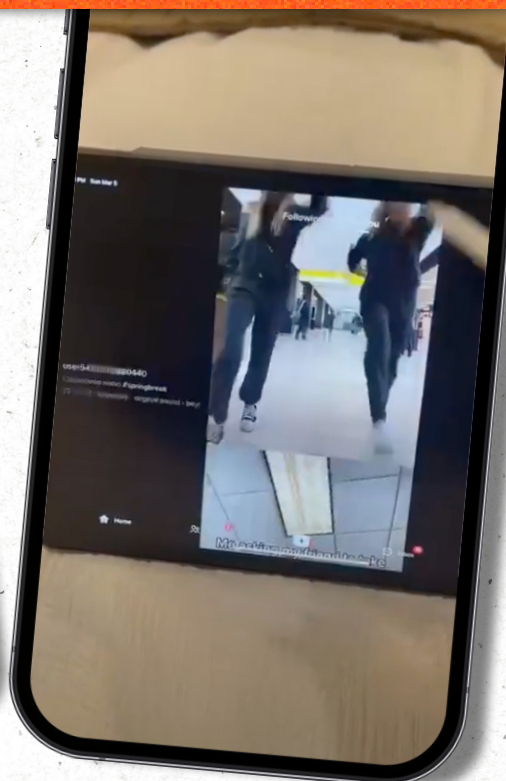
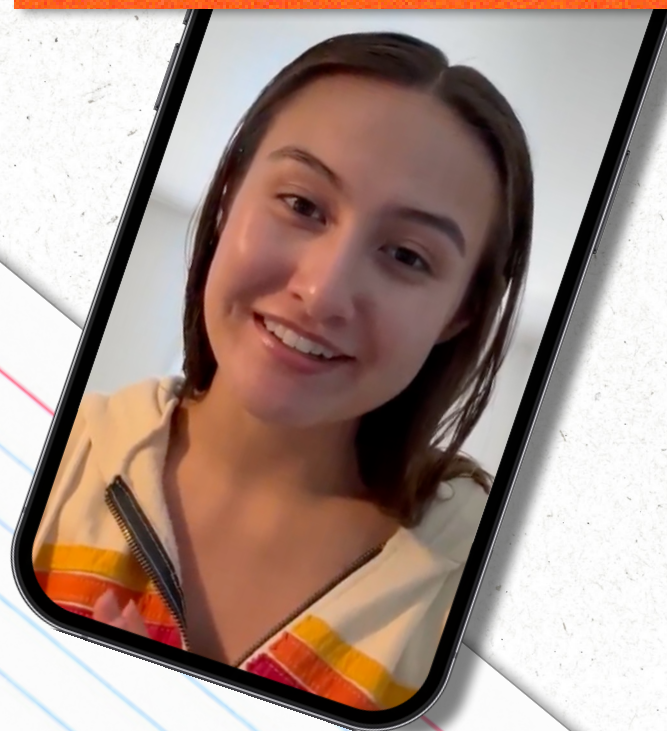


“It was absolutely dazzling to watch our research participants’ high-speed scrolls and observe how they moved from one platform to another with ease and ability. I am amazed by how much content they consume first thing in the morning because it will no longer be news in the afternoon. They live in a perpetual state of FOMO!”

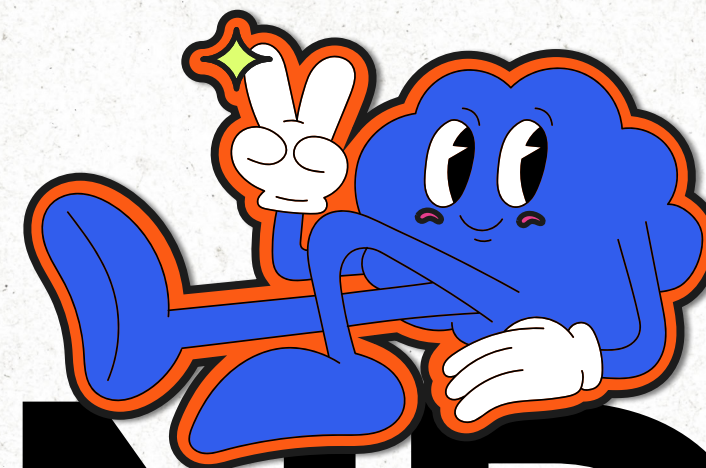
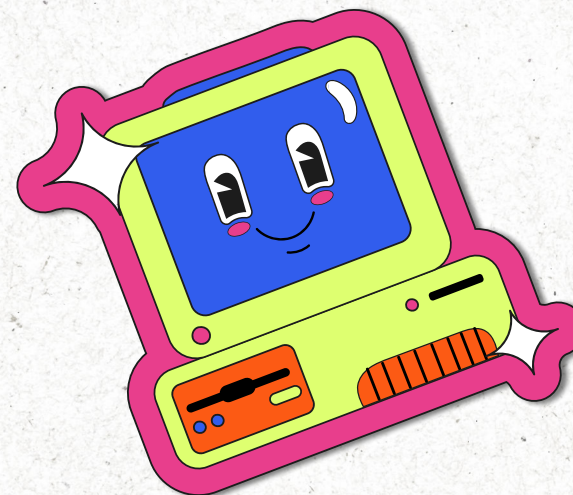
Dr. Ulrike Gretzel, Senior Research Fellow, Center for Public Relations, USC Annenberg School for Communication and Journalism



SOME OF THE GEN Z PARTICIPANTS



HERE'S WHAT
WE FOUND:



	MIND THE (GENERATIONAL) GAP	
	Our participants noted that their information consumption habits and media diets diverged significantly from their parents.	
	Gen Z	Their Parents
Source	Mobile-first	TV, physical media
Curation	Take care to curate feeds when possible, but also rely heavily on recommendation algorithms	Comes from sources they're already following, accustomed to
Habits	Tap into a variety of different content and mediums at all times	Consistent media diets, tuning in at predetermined times throughout the day
Usage	Habitual multitaskers	Focused on one medium at a time
Apps/ Platforms	A network of apps, utilized for different purposes	Facebook & Instagram
▶●✕		

THE “PLEASURE AND PANIC” (AND INDIFFERENCE) OF THE FEED



Gen Z's heavy social media use is driving two contrasting—and equally visceral feelings.

On one hand, they embrace getting lost in their scrolls. On the other, they're wary of social media's effects on their mental health and social lives.

Gen Z has a complex, even contradictory relationship with social media and technology.

The original promise of social media—connection, creative expression, and community—seems to be fading.

Several students welcomed the opportunity to disconnect and “not be controlled by notifications.”

28% of social media users are worried they're spending too much time on social media.*

***SOURCE: GWI (2022)**

IN THEIR WORDS

"[Being] without technology, without phones has just really helped me be more productive and just helped with my overall mindset throughout the day."

Amanda, 21

"When I go to my home page on my phone, it's kind of just...an impulsive, like oh..., I just opened TikTok... without thinking about it. So when the first video is the ad and the ad starts playing, I kinda...snap back to reality a little bit and I was... I have no business being on TikTok right now."

Jessica, 22

"I wish I was, you know... exercising my brain and... reading a piece of paper versus... just... the blue light of my screen immediately in the morning."

Chigo, 23

"Being able to disconnect from my phone, being forced to, not being able to check the Internet...not being controlled by notifications or something like that, having to...willingly go somewhere to view the Internet. Where there's service. ...It feels really more...I'm in control.... It feels like everyone is just being controlled by what their algorithm or what their data deems them interested in so that companies can exploit them for profit."

Edward, 20

But... many also
relished the
opportunity to
get lost scrolling
for hours on end.

50% of Gen Z respondents
reported feeling "indifferent"
after seeing their weekly
screen time report.*

*SOURCE: DAY ONE AGENCY
X DCDX'S 'THE LOOP' GEN Z
PANEL, JUNE 2, 2023

IN THEIR WORDS

"I rely on social media, need content constantly to be entertained."

Jasmine, 22

"TikTok makes me laugh a lot and I love the serotonin boost it gives me."

Chigo, 23

"I tended to just look at some longer videos because it's evening and I feel like it's a pretty great time to watch some videos because I love watching that when I felt most relaxed and when I was like laying on bed."

Jenny, 23

"I'd miss TikTok videos and going on binges. It feels really satisfying to go online and just sit there."

Edward, 20

"I really like going through social media and media at the end of the day to kind of unwind a little bit."

Erin, 23

And dive into
the rabbit hole
when they
come across
something in
their feed that
intrigues them.

70% of Gen Z say the flexibility
benefits of access to the internet on
their phone outweighs the downside
of always being accessible.*

*SOURCE: SQUARESPACE (2023)

IN THEIR WORDS

"So sometimes I just kind of go down like a rabbit hole of looking through tweets."

Jeremy, 24

"After just stumbling upon YouTube video..., which is called the LEGO iceberg explained. And I started watching..., and kind of really just went down the rabbit hole of what LEGO is and what it can do. And watched this literally two hour video to learn more about it."

Chika, 20

"I am easily swayed by the media. When I notice a new trend, I stop whatever I'm doing to pursue it."

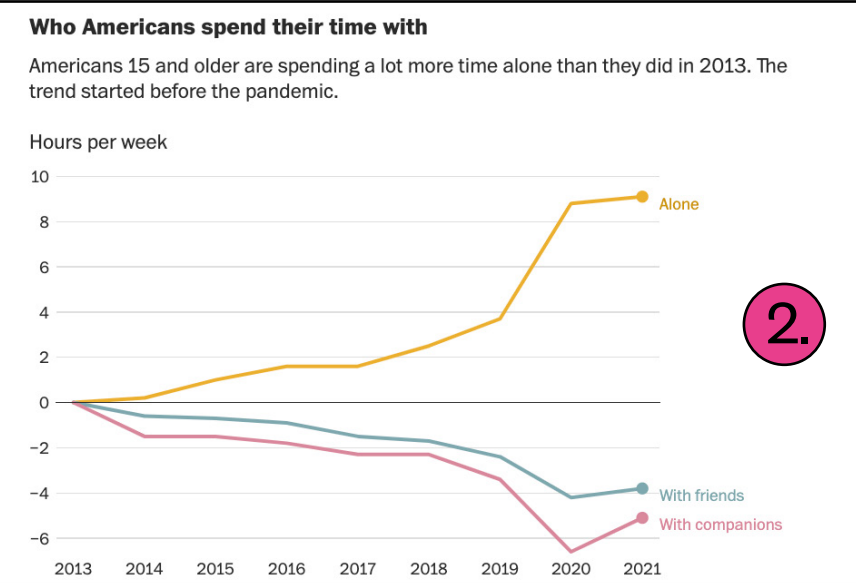
Christo, 18

IN OUR SCROLLS

1.

Surgeon General Warns That Social Media May Harm Children and Adolescents

The report by Dr. Vivek Murthy cited a “profound risk of harm” to adolescent mental health and urged families to set limits and governments to set tougher standards for use.



A recent advisory report from the Surgeon General issued a warning that social media poses a health threat to young Americans.

3.

The video essay boom

Hour-long YouTube videos are thriving in the TikTok era. Their popularity reflects our desire for more nuanced content online.

By Terry Nguyen | Mar 9, 2022, 8:00am EST

f t SHARE

4.

TECHNOLOGY

How to Watch a Movie in 15 Easy Steps

TikTok users are falling down rabbit holes where feature films are offered one 10-minute clip at a time.

By Caroline Mimbs Nyce

On TikTok, users are watching full-length feature films in 10-15 bite sized formats. But even as short-form, digestible video content reins supreme, many Gen Zers are still opting for longer content like video essays on YouTube.

5.

05-15-23

Why Gen Z is ditching smartphones for ‘dumb phones’

Gen Z’s infatuation with vintage technology is about more than trend chasing.

6.

‘Luddite’ Teens Don’t Want Your Likes

When the only thing better than a flip phone is no phone at all.

Gen Z’s embrace of older, more analog technology, like flip phones (often referred to as “dumb phones”) speaks to a growing awareness around the effects of too much screen time.

The Take- away

For Gen Z, social media is viewed as both a mood and energy regulator by our students—their scrolls providing entertainment and escape.

At the same time, many also expressed concerns about the amount of time they spend in front of their screens, and sought to re-evaluate their relationship with their go-to social media.

THERE'S
A NEW PRIME
TIME—IT'S
ALL THE TIME



Gen Z's always-on information consumption habits create a new reality: traditional media models that revolve around “when” are less relevant than ever. “Where” is far more important.

97% of teens say they use the internet daily, and 46% of teens say they use it almost constantly.*

*SOURCE: PEW RESEARCH (2022)

For older generations—and the media companies who sought to harvest their attention—there were set times dedicated to engaging with news/entertainment (hence, “prime time”).

For Gen Z, a generation whose attention is spread across multiple different platforms at all times throughout the day, “prime time,” doesn’t exist.

IN THEIR WORDS

**"I watch way more,
I'll stay up all night"**

Mia, 25

**"I use social media
10x more than they do"**

Julia, 24

"I scroll for hours"

Alizee, 20

**"My parents watch
PBS NewsHour every
night to get their news."**

Maggie, 23

**My parents watch the
"Same content over and over
and at predetermined times"**

Shayna, 24

In comparison to their parents, our students said they're almost constantly multitasking.

Scrolling is not only something they do, it's a behavior that's part of the always-on soundtrack of their lives.



Gen Z is 80% more likely to always be multi-screening compared to their parents.*

*SOURCE: TREMOR MEDIA & HULU (2017)

IN THEIR WORDS

"I often watch TikToks while completing my 'busy work' I'll also scroll through Instagram while I'm waiting to pick up an order somewhere (for example while waiting for my lunch to be ready at a cafe). I rarely am ever honestly just looking at social media- it's always a mix of something."

Lauren, 24

"A lot of times i'll be multitasking, eating my food between classes and work. So i'll be scrolling through TikTok and Instagram"

Nicole, 20

"I love to walk on my treadmill while I watch TikTok, YouTube or Netflix content. I find that when I am consuming content I am often doing something else at the same time (ADHD)."

Lauren, 24

59% of Gen Z agree that they use short-form video apps to discover things that they then watch longer versions of.*

*SOURCE: YOUTUBE/
IPSOS (2022)

While speed is key, brevity and relevance are just as important as timing.

IN THEIR WORDS

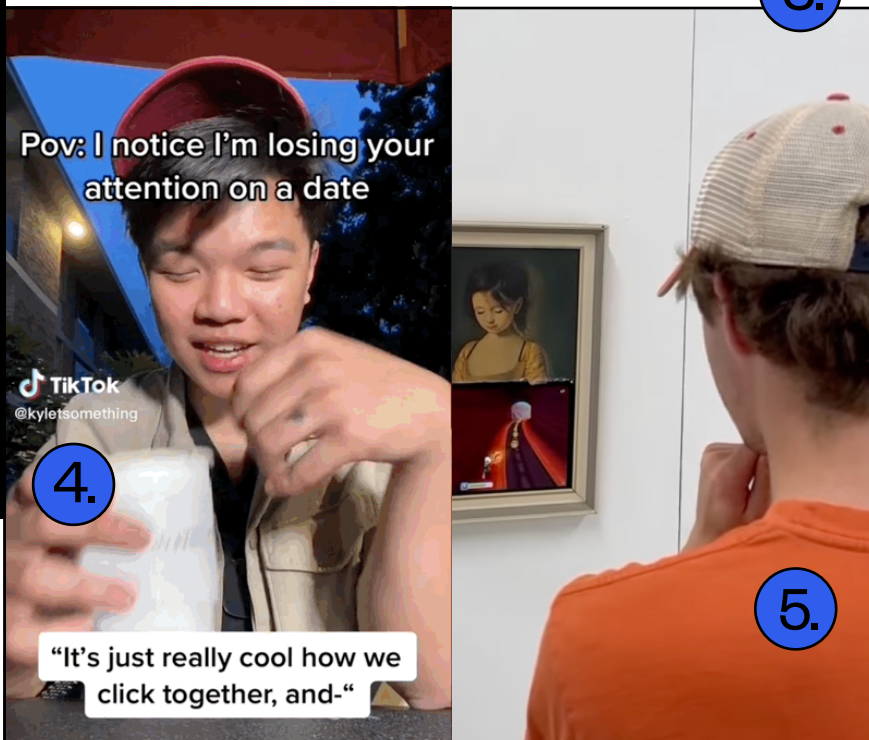
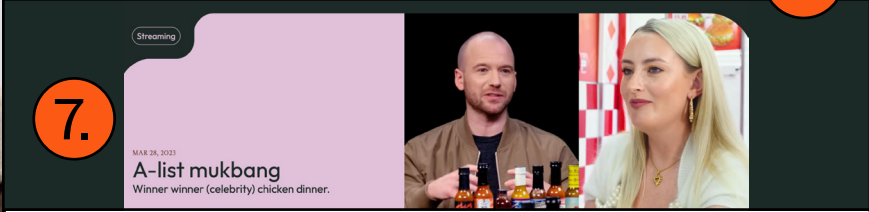
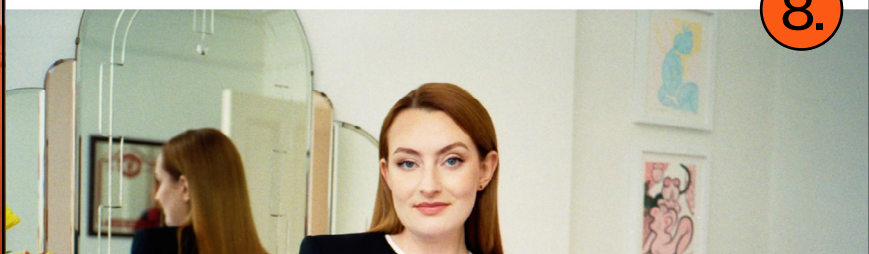
“So, I just read...a couple paragraphs unless it’s a very engaging article. And then sometimes I will refresh the news [website] because when you refresh it, you get a new headline. Like, I just got this random new one. Random new one...Random new one... I was just looking at the pictures, honestly... Yeah...just reading the headlines.”

Lily, 24

“I’ll just do a quick, quick scroll. If anything peaks my interest, then I’ll stay on it longer.”

Adriana, 22

IN OUR SCROLLS

 1. 4:42 PM · May 9, 2023 · 132.6M Views 197.7K Retweets 26.3K Quotes 915.8K Likes 24.4K Bookmarks	TikTok's Subway Surfers Videos Signal Demise of Our Attention Span 3.  4. "It's just really cool how we click together, and-"	Is There a Future for Late-Night Talk Shows? 6.  7. She goes on awkward 'dates' with celebs. Now she's flirting with fame. Amelia Dimoldenberg has reimagined the talk show by doubling down on its cringiest trope: hosts hitting on their guests By Jessica M. Goldstein March 14, 2023 at 5:00 a.m. EDT 8. 	
2. Tucker Carlson announces plans to relaunch his show on Twitter By Oliver Darcy, CNN Updated 8:20 AM EDT, Wed May 10, 2023	TikTok's FYP was recently flooded with multi-framed video clips, usually featuring clips of the mobile game Subway Surfer, and Family Guy, as a commentary of Gen Z's short attention span.	Late night TV, once the pinnacle of prime time, have been modified for platforms like YouTube and TikTok, with shows like Chicken Shop Date and Hot Ones cultivating widespread fandoms.	

The Take- away

When “prime time” is all the time, the idea of prioritizing a specific time slot for audience tune in is becoming irrelevant.

Meeting them where they're at, with platform-right formats, is key to capturing Gen Z's attention.



TREND THREE:

WHAT'S “NEWS?” THAT'S TRICKY

The definition of news is increasingly amorphous. And for our respondents, the medium—and the message—is momentary.

What is “new”
and “news” is
broadly defined
and fades out
in hours, if not
minutes.

70% of journalists said a subject
connected to a trending story
makes it more shareable.*

*SOURCE: MUCK RACK
STATE OF JOURNALISM, 2021

IN THEIR WORDS

"The happenings around the world localized to problems you face in your life."

"News is information that affects your life. Whether that is from professional organizations or individuals, news is updates and documentation of what makes the world operate."

"I would define news as something special or important that deserves to be known by more people. It could also be some unique things that won't happen in people's daily lives everyday."

"Telling others events that they haven't heard of before."

"Significant stuff that happens to someone and everyone else needs to know it."

"I would define news as anything that impacts culture and creates conversation."

50% of Gen Zers receive their news
from accounts on social media.*

*SOURCE: DAY ONE AGENCY
X DODX'S 'THE LOOP' GEN Z
PANEL, JUNE 2, 2023

Our students are becoming their own editor-in-chief, curating their news and information diets from a variety of different sources, outlets, and mediums.

IN THEIR WORDS

"When I'm trying to inform myself, I honestly just go to the 'top stories' section of apple news on my phone to get a quick rundown of what's going on in the world. It's informative because it links to fairly reputable news outlets and is easily accessible. I also find infographics on instagram can be informative, and the more I see my friends repost it the more likely I am to click on it / understand what's happening in the world."

Ben, 23

"It really depends on what type of information I'm looking for. If it's pop culture and what's going on in the entertainment world, I love scrolling through the various entertainment social media accounts like People or Variety or Billboard on Instagram and TikTok."

Julia, 24

TikTok's "FYP" is becoming their front page.

49% of top news publishers are
now regularly publishing content
on TikTok.*

*SOURCE: REUTERS

IN THEIR WORDS

"TikTok really does have this power now to show us what's going on around the world and to really connect with people that are our age...it's crazy that only a, you know, fifteen second TikTok video about a certain subject made me feel that way."

Alizee, 20

"I find TikToks to be the most informative. This is because it allows outlets and users to communicate information in a quick manner."

Erin, 23

"TikTok is a great way to break down that barrier to stay in the know."

Chigo, 23

While podcasts are helping to forge a new, intimate relationship between creators, journalists, and their fans.

55% of American 18-24-year-olds turn to podcasts to get answers to hard or personal questions. 62% said they listen to podcasts to inform the conversations they have with their friends.*

*SOURCE: SPOTIFY CULTURE
NEXT REPORT (2022)

IN THEIR WORDS

"A lot of the information I take in (political, commercial, or otherwise) is through people who I have some sort of connection to. This could be in real life or through media. For example, I spend hours every day listening to podcasts and feel comfortable taking recommendations from the hosts because I feel whatever they'll recommend would align with my interests or values."

Nicole, 25

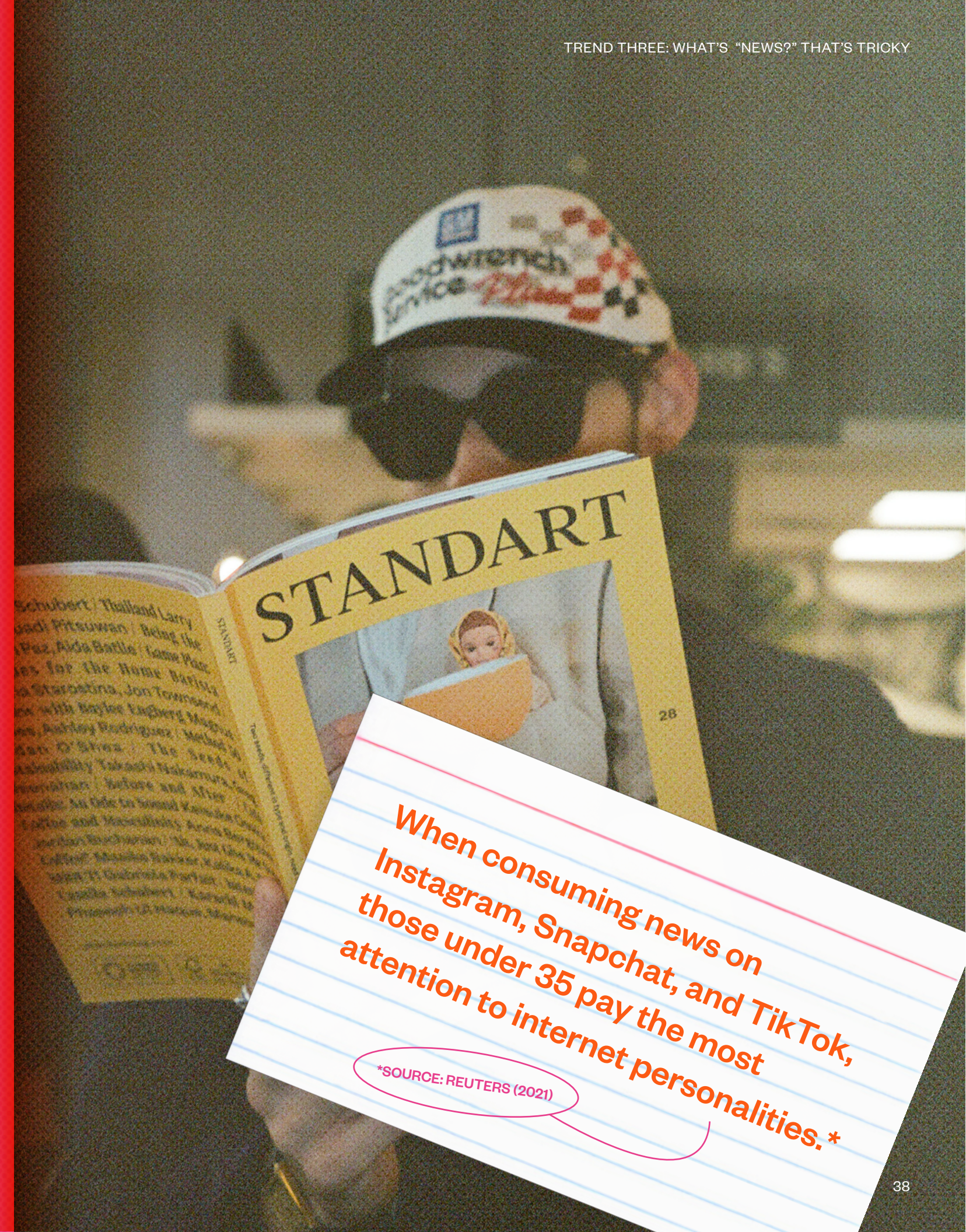
"Each podcast I listen to feels like mini masterclasses from professionals across different industries as they speak about something important to them."

Amanda, 21

"When you listen to a podcast, it's like you're there with them [influencers], and it's always been like a very interesting phenomenon to me...how people like, regular people or people on Instagram, they feel like they can get to know these people who, like, are social media stars or real celebrities, just because you see so much into their lives."

Clare, 24

And “trusted source” no longer means legacy institutions or media outlets, but friends, influencers, and even strangers online.



When consuming news on Instagram, Snapchat, and TikTok, those under 35 pay the most attention to internet personalities.*

*SOURCE: REUTERS (2021)

IN THEIR WORDS

"Personally, whenever there is a video that includes a specific person's personal experience, it instantly grabs my attention."

Alizee, 20

"Reaching me through people who I already know and trust is big. A lot of the information I take in (political, commercial, or otherwise) is through people who I have some sort of connection to."

Nicole, 25

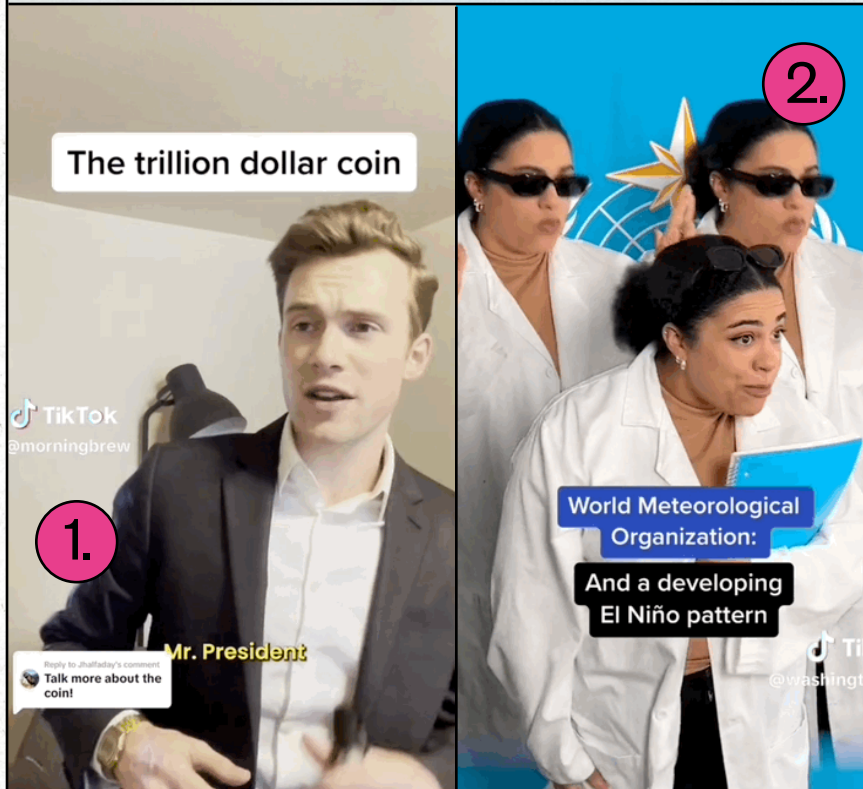
"So if some creator/influencer online that I follow talked about this brand/political party/non-profit, I would trust their judgement more, especially if it is not sponsored, but actually genuine. As long as it is linked to the actual human experience."

Chika, 20

"I also find infographics on Instagram can be informative, and the more I see my friends repost it the more likely I am to click on it / understand what's happening in the world."

Tim, 23

IN OUR SCROLLS

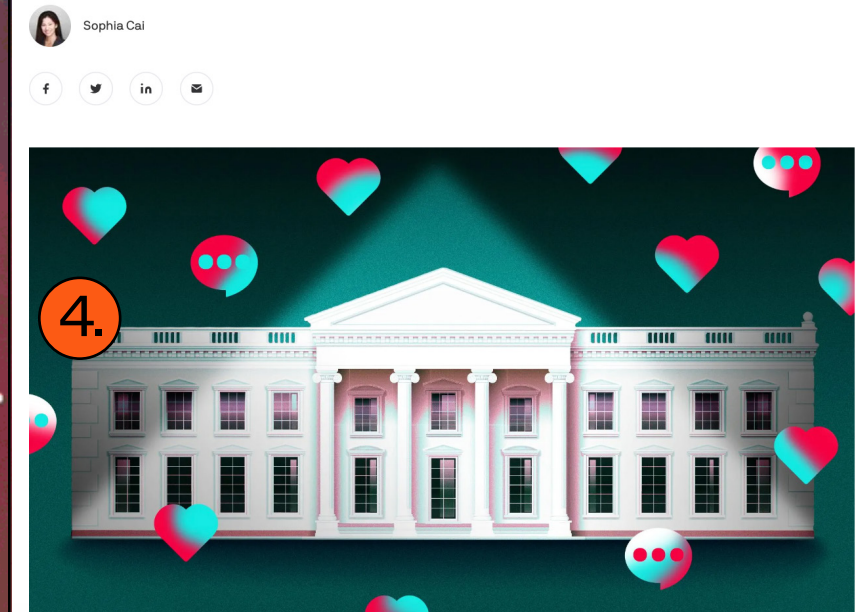


Newsrooms are using low-fi graphics and native platform features on TikTok to break down important global events.



Legacy outlets are leaning into bite-sized, digestible pieces of audio to break down what consumers need to know, fast. The New York Times recently launched their new audio front page, "The Headlines," which breaks down important stories in under ten minutes.

Biden's digital strategy: an army of influencers



The Biden administration recently announced plans to work with hundreds of influencers to tout his record ahead of the 2024 election, even giving them their own briefing room.

The Take- away

The term “news” is **squishier than ever.** Not only does Gen Z expect to be informed by what they consume, they also want value, utility, and **entertainment.**

THE RECOMMEN- DATION GENERATION



TREND FOUR:

**The way that Gen Z
consumes information today
has also fundamentally
revolutionized how they
discover, learn and buy.**

We asked our participants to discuss in real time how they consume information and discover brands over a five minute time span.

As opposed to their parents, they use a slew of sources and platforms to discover products and services including TikTok, Reddit, Instagram, YouTube, SnapChat, Pinterest, What's App, Google News, Notion and Tinder.

97% of Gen Z consumers say they now use social media as their top source of shopping inspiration.*

*SOURCE: STATUS OF SOCIAL COMMERCE REPORT (2021)

IN THEIR WORDS

“I wanted to start a new gym membership and so I did a lot of research before signing up for one of the gyms around my house. And I looked up on Yelp, on Google, and I think that’s pretty much it. But after I found, like, several gyms on Yahoo!, Hulu, then I directed to Instagram and not really Facebook or Twitter or TikTok, only Instagram, and then I checked the website. So, and then I compared people’s, like, reviews on Instagram and on your app and as well as Google.”

Aimee, 24

“So it all started with a YouTube video. So I was really looking at different things and I was like, what if I dyed my hair white? And I had no idea how to do this. So I was like, okay. I didn’t use video to tell me how to do this. And so I was this YouTube video, how I got by her white, and I literally just followed what she said. And so she links the items that she actually used in the video, right here. And so I just clicked on them. So I’m like, oh, this is cool. Let me do it then. You know, I don’t have to look for it. She already kind of provided the items.”

Chika, 20



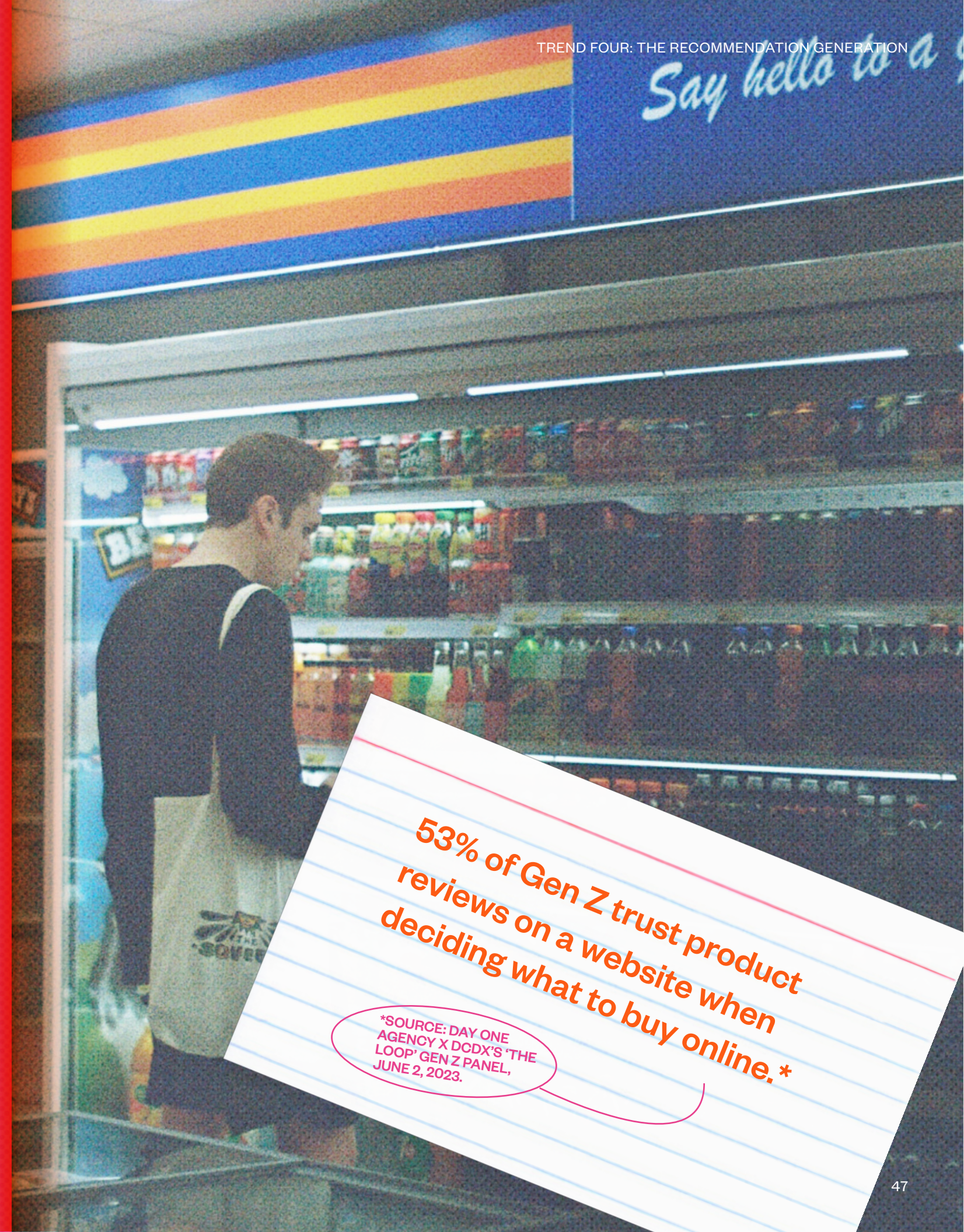
For **beauty goods** such as hair styles, cosmetics, and body care, demonstrations by TikTok and YouTube influencers were the most important.

For **clothing**, seeing the product on other “real” people (friends, influencers, or user-generated content featured in the Instagram “as seen as” feature) was most important, as well as seeing styles on their “For You Page” on TikTok.

For **hotels and restaurants**, seeing or hearing recommendations from friends posting on social media was most important.

Influencers are a major part of the purchasing decision mix.

Reviews were also often mentioned as the most important piece of information, and were often described as a way to cross-check or double-check the validity of other information.



53% of Gen Z trust product reviews on a website when deciding what to buy online.*

*SOURCE: DAY ONE AGENCY X DCDX'S 'THE LOOP' GEN Z PANEL, JUNE 2, 2023.

IN THEIR WORDS

“If an influencer is still trending and is someone I follow, I’m definitely likely to purchase the product of a partner. It’s kind of like supporting a friend’s business, except you don’t actually know this person.”

David, 19

“They inspire me when I feel alone, or when I’m not happy in my life I’ll turn to them. I bought a lot of products from influencers. Hoodies, jackets, shirts, because I wanted people to know that I listen to them, it’s a cool way to make friends.”

Justin, 25

“Social media influencers on TikTok have influenced a lot of my decision making. I go there for food and shopping suggestions.”

Adriana, 22

Advertising needs to be more compelling than ever to inspire shopping decisions. But that doesn't mean that advertising is not relevant—it just means that it needs to fit into how to get Gen Z's attention.

Our brain decides in 17 milliseconds if we like something or not.*

*SOURCE: AXIOS (2022)

63% of study participants skipped advertisements while nearly half (48.1%) did not pay attention to it.

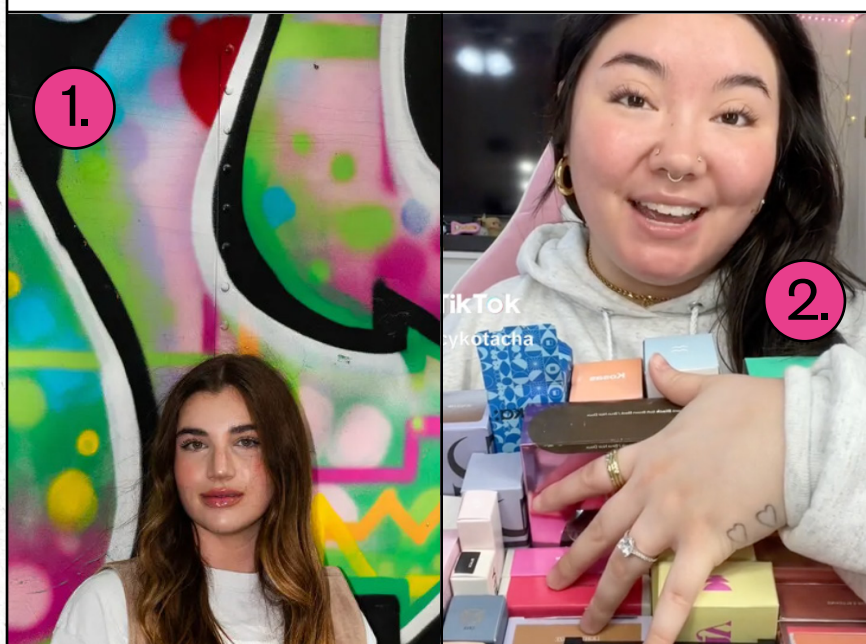
IN THEIR WORDS

“If it’s a brand that doesn’t have a person representing it (e.g. Lay’s), then I’m less likely to pay attention to it because it feels less personable. But if it’s a brand that’s partnered with an influencer I like, then I’ll at least take note of what they’re promoting. Within my 60 minute content monitoring, an influencer I follow (@shreksdumpster) was promoting the Belasco as one of her fav venues in LA. I honestly didn’t even register it was a sponsored video until I saw the tag on the caption.”

Emily, 23

IN OUR SCROLLS

For Gen Z, Playing an Influencer on TikTok Comes Naturally
There's stuff to promote now. The followers can come later.



Gen Zers are organically taking behavioral cues from influencers on TikTok, even without major brand deals—broadcasting daily routines, unboxing product hauls, and trying on apparel or beauty products.

THE CUT STYLE | SELF | CULTURE | POWER
ADD TO CART
We're All Shopping Addicts Now The internet makes it easy to buy things. It's the growing anxiety about how much, and why, that's the hard part.

PERSONAL FINANCE - SOCIAL MEDIA
Gen Z and millennials say social media is pressuring them to buy what they can't afford, and it's sending them into an anxiety spiral

Commerce has become ingrained in Gen Z's day-to-day digital experience. But the pressure to purchase is also fostering a growing sense of anxiety, and issues with credit card debt.

STYLE
The Fanelli Cafe, age 103, has become a stylish Gen Z hangout
They're lured by TikTok and Instagram posts, in search of an ostensibly authentic New York City that's become harder and harder to find
By Ashley Fatters Maloy

TRENDS | MAY 17, 2023
Cheesier, Saucier, and Drowning in Caviar
How TikTok took over the menu.
By Ezra Marcus

Eclipsing established search engines, TikTok is becoming the go-to destination for Gen Zers to discover restaurants, prompting both new and established institutions to optimize their menu, service, and decor with the algorithm in mind.

The Take- away

Our screens are
Gen Z's storefronts.
Driving modern day
influence involves
telling **authentic stories**
that fit how they
consume information
and who they follow.

A Mobile
Ethnographic
Study

A Deep Dive Into Gen Z's Scrolls

Four Key Takeaways

June 2023

THE “PLEASURE & PANIC” (AND INDIFFERENCE) OF THE FEED

Gen Zers are seeking a more mindful and intentional relationship with technology.

Consider how your brand, or product, might be able to provide meaningful connection and community both online and off.

THERE'S A NEW PRIME TIME—IT'S ALL THE TIME

When “prime time” is all the time, the idea of prioritizing a specific time slot for audience tune in is becoming irrelevant.

Scroll-stopping storytelling means leaning into the way that Gen Z interacts with their go-to platforms, and leaning on the right people to tell stories that are authentic to the consumers you want to reach.

WHAT'S ‘NEWS?’ THAT'S TRICKY

The medium is message, and the message is momentary.

“News” ~~has changed~~ is changing. Outlets must adapt to new and existing channels, platforms. They also need to be wary of how they are sharing news, tapping trends, and utilizing the right voices to earn relevance.

THE RECOMMENDATION GENERATION

The discovery journey starts on social, and decision making is crowdsourced.

Think about how your brand shows up in platform-specific search queries, and start engaging directly with the community to build trust and relevance.

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USC Annenberg
Center for Public Relations



HAVE QUESTIONS FOR GEN Z?

Ask them directly at askgenz.com,
or head to Day One's website and
subscribe to its newsletter for more
rising trends and insights.



NEW YORK LOS ANGELES CHICAGO PORTLAND

THIS IS DAY ONE. THIS IS JUST THE START.
HELLO@D1A.COM

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Appendix

Our Participants

34 eligible USC students born between 1997-2004

26 female,
7 male,
1 non-binary

16 originally from California,
16 out-of-state,
2 went to high-school abroad

1 American Indian or Alaska Native,
5 Asian,
6 Black or African American,
7 White,
9 Hispanic,
5 mixed race
1 prefer not to answer

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