

Gen Z Culture Decoded

The New Rules of Engagement

March 27, 2025

Methodology

Gen Z is rewriting the digital playbook, setting new standards for content discovery, engagement, and consumption. This study demonstrates that *Gen Z* is **social-first, always on, and hyper-connected** like no other before it.

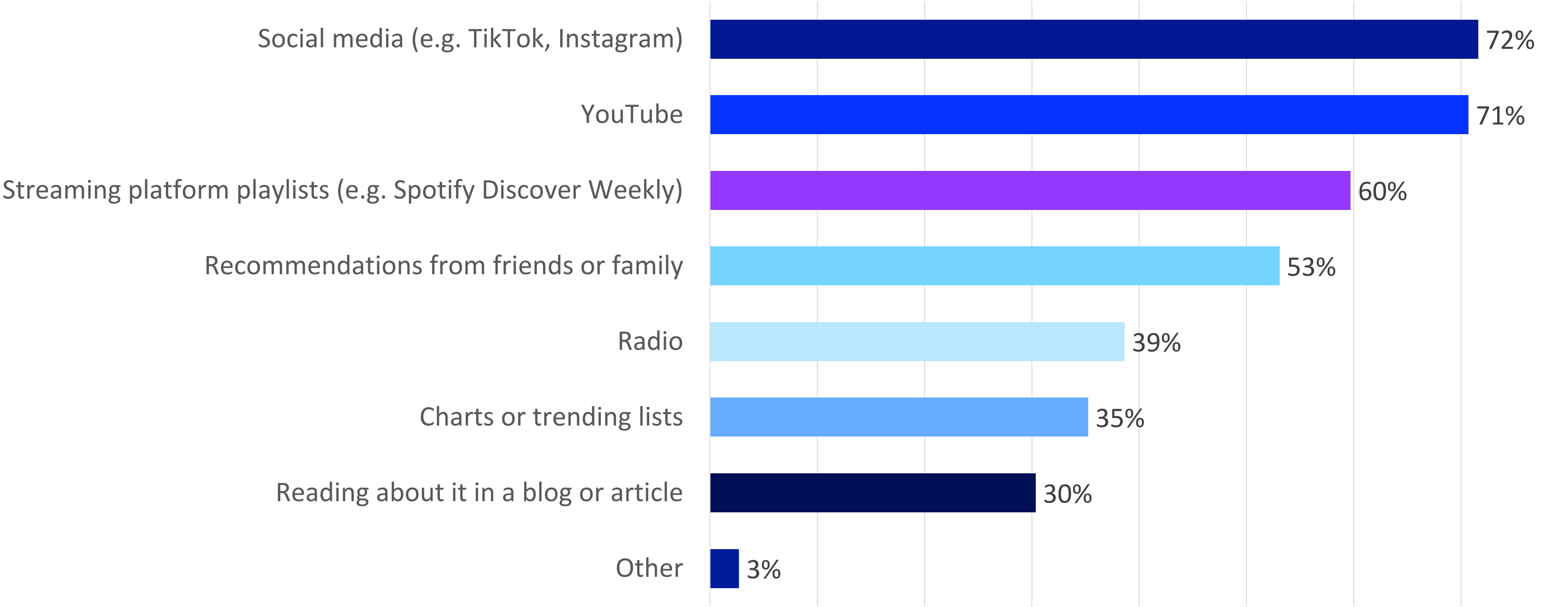
- **Study conducted online** in the United States via **Toluna Start**.
- **Sample size:** 2,000 Gen Z consumers.
- **Age group:** 16-27 years old.
- **Fieldwork period:** December 2024 – January 2025.
- **Survey designed** to track Gen Z's evolving media consumption, brand engagement, and digital behaviors.
- **Insights include:** Platform preferences, content discovery, trust in media, AI perceptions, and purchasing behaviors.
- **Findings provide** a longitudinal perspective on how Gen Z's habits may shift as they enter adulthood.

The New Rules of Engagement – Always On, Everywhere

Gen Z is Creating New Rules of Engagement - Social-First, Always On, & Hyper-Connected

Social platforms and YouTube are the starting point for discovery for more than 71% of Gen Z consumers

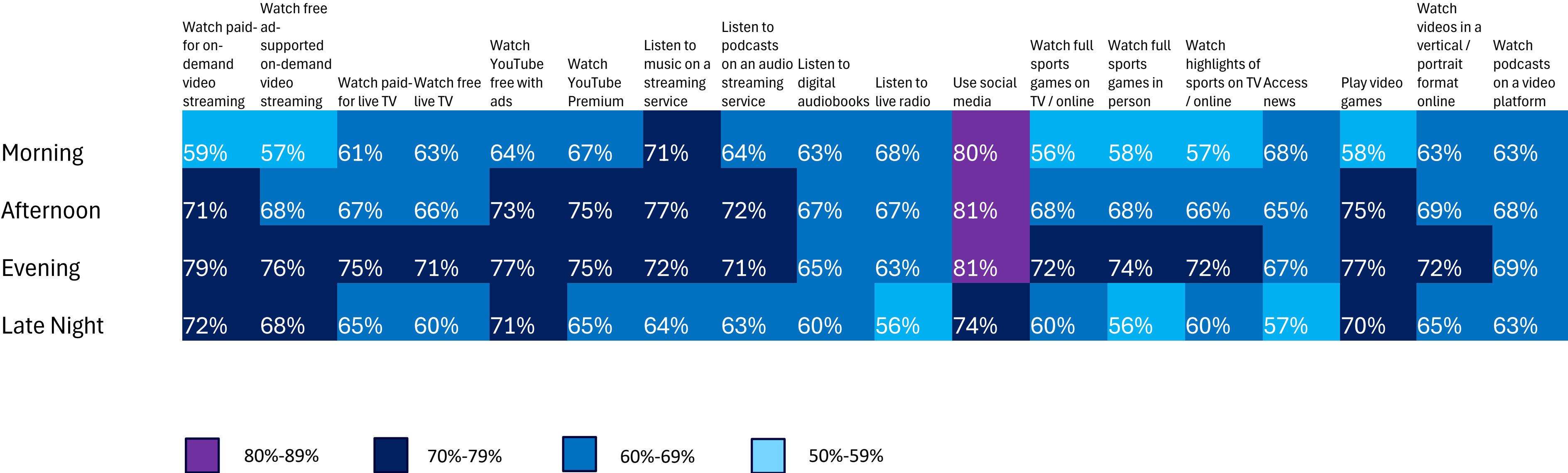
60% find new content on streaming platform playlists



118. MQ14 How do you typically discover new media content eg. music, podcasts, audio books, tv series | Base: 1884

More than 55% of Gen Z consumers are “always on,” for each of 18 activities studied, at any given time of day

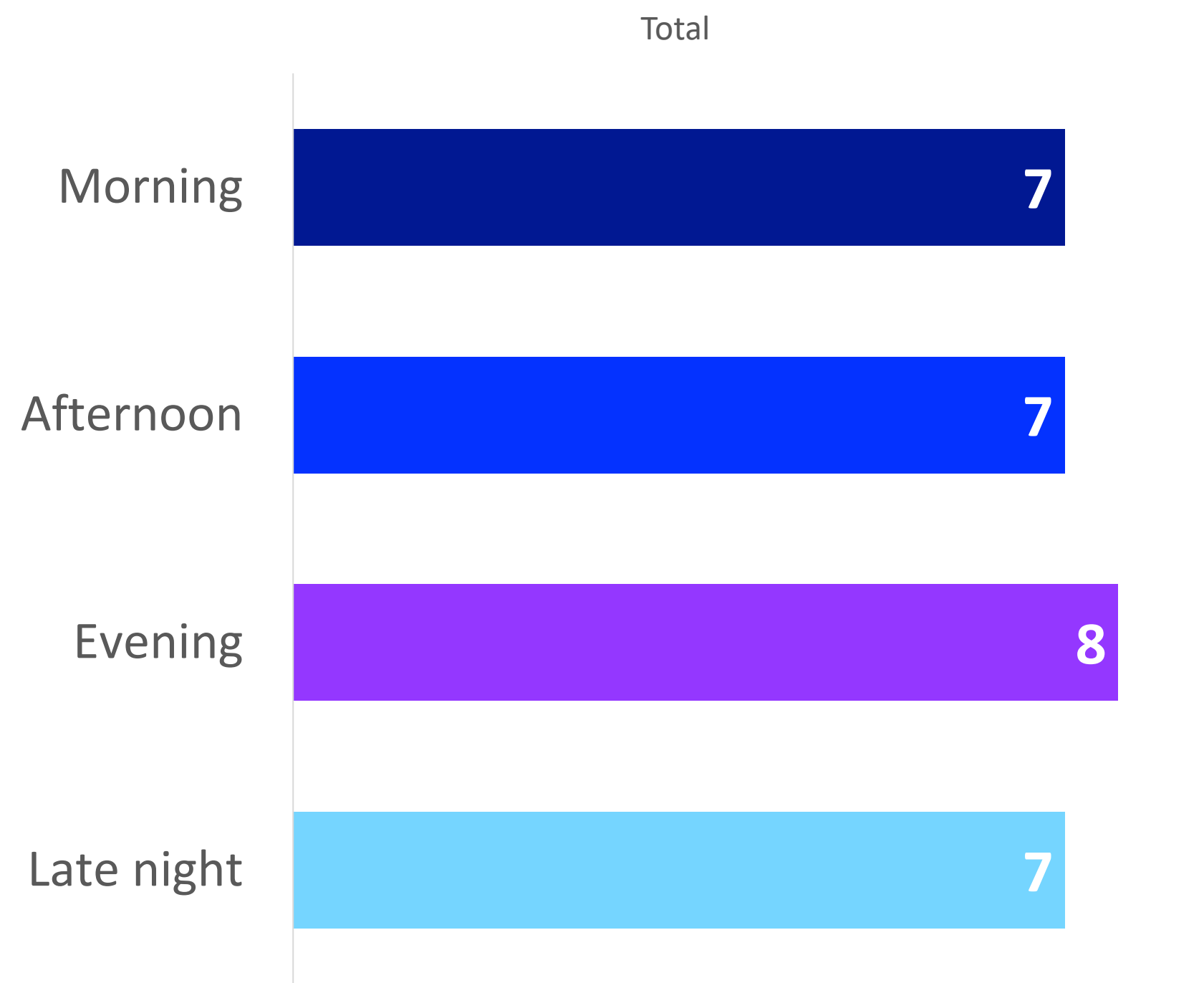
Social media is ubiquitous, with at least 74% using it at any time of day



17. MQ3 Time of day each activity is engaged with - Question Type: Multiple Choice | Total Engaging with an activity: Base size: 1,877

Gen Z is hyperconnected all day long, partaking on average in at least seven of the 18 activities studied during any given daypart

Average number of activities rises to eight in the evening



17. MQ3 Mean number of activities - Question Type: Multiple Choice | Base 2,000

Comedy is the # 1 genre across entertainment platforms and a preferred element in advertising

Comedy is the main attraction across all media types and a core engagement driver

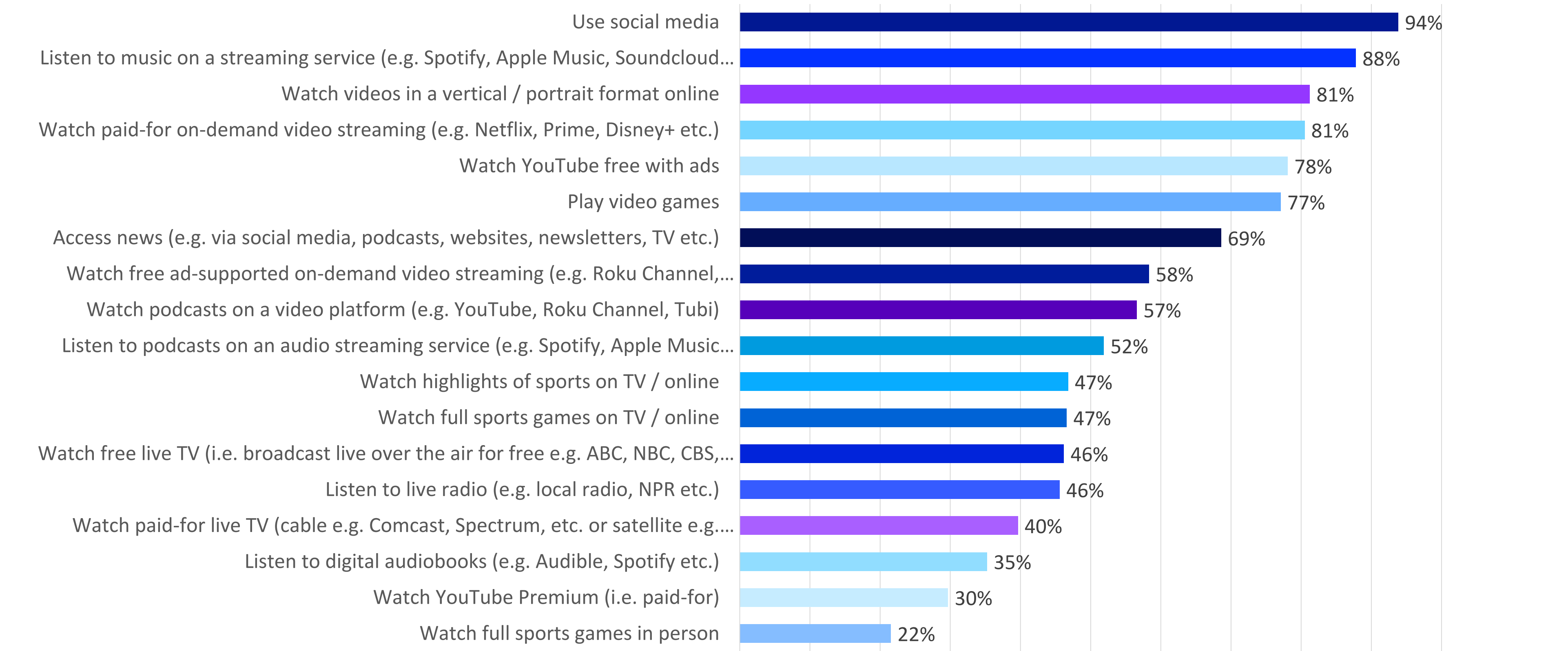
Media Type	TV Series	Podcasts	Audio Ads	YouTube Content	YouTube Engagement
Top 3 Genres	Comedy	Comedy	Top Rated / Quality	Music	Personal Relevance
	Horror	Crime & Mystery	Personal Relevance	Comedy	Comedy
	Action	Entertainment and pop culture	Comedy	Gaming	Top Rated / Quality

MQ6 /MQ16 / MQ19 / MQ21 / MQ25 – Preferred genre preferences across platforms and most engaging ad elements | Base 1,799

The New Rules of Engagement – Formats Matter

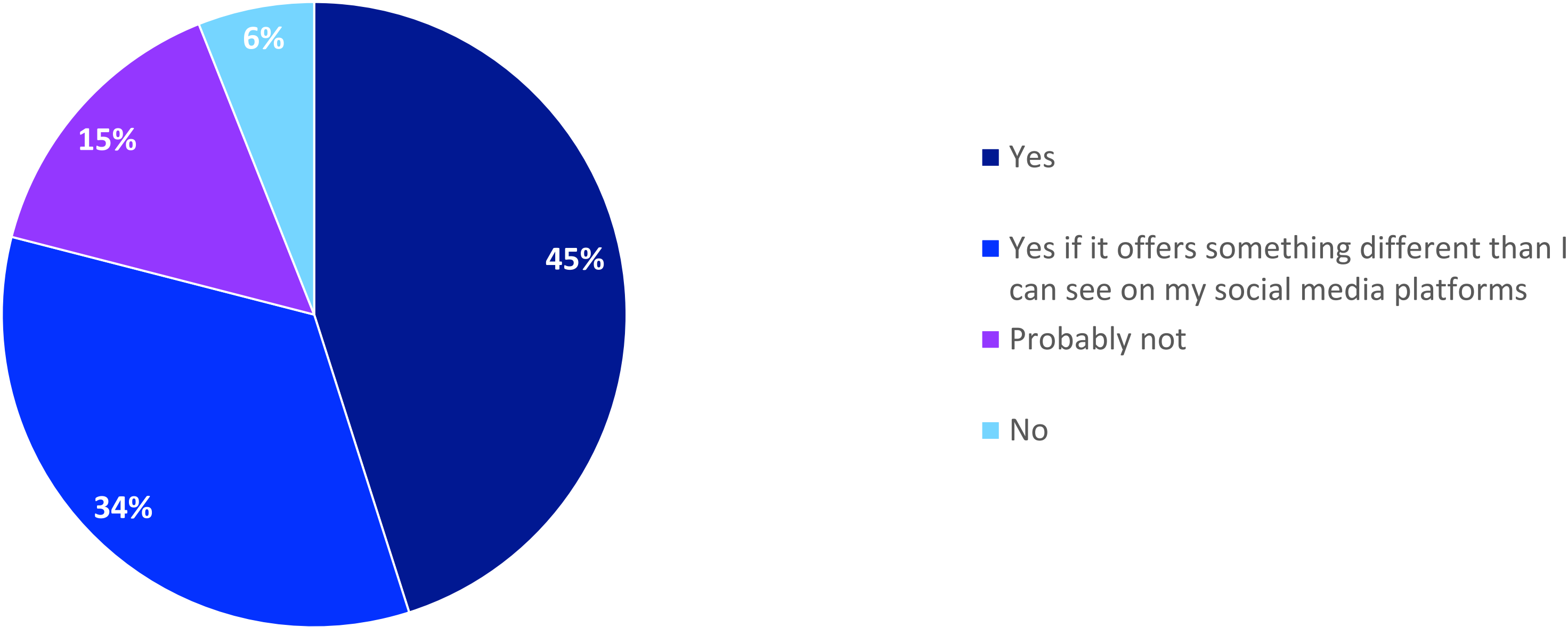
Gen Z has a thing for Vertical Videos

81% of Gen Z video viewers watch videos in vertical or portrait format weekly



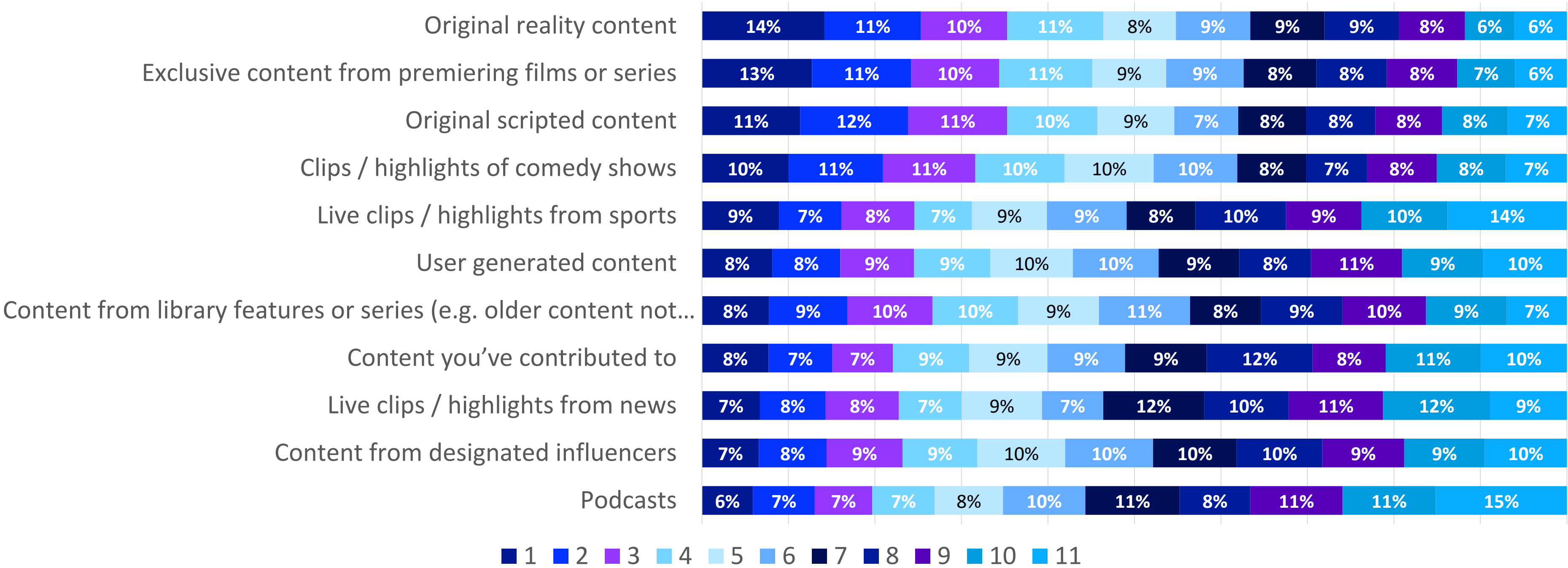
I regularly do the following things - weekly or more frequently - Question Type: Multiple Choice | Total Respondents: 2000

79% said adding a shorts feature to a streaming service would increase their weekly streamer app usage



28. MQ5b If offered a free, short form content offering and experience within its app, would this be likely to increase your weekly use of the app?
Question Type: Single Choice | Total Respondents: 1595

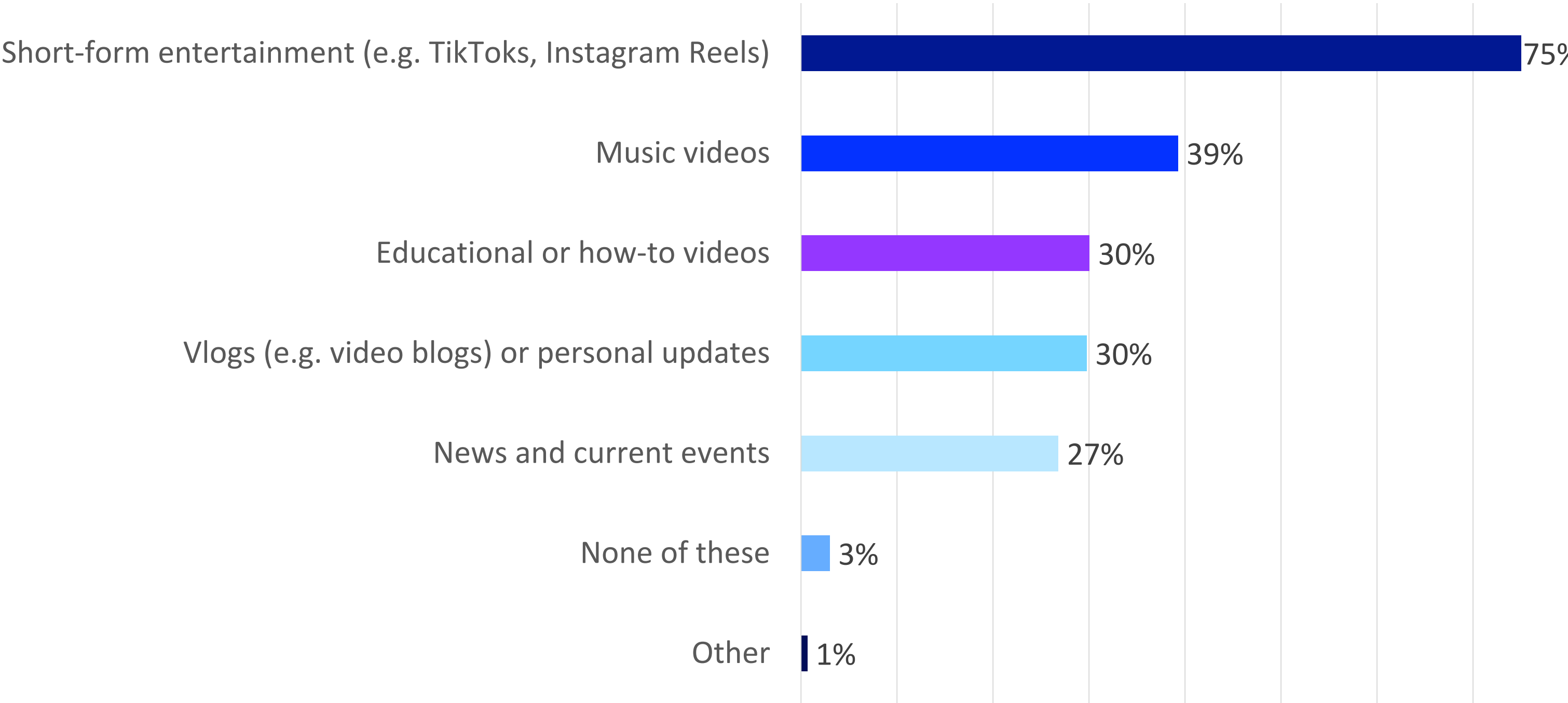
Gen Z consumers expressed preferences for short form content offerings from streamers to include original reality programming, exclusive previews, original scripted content, and highlights from comedy shows and live sports.



29. MQ5c Please rank the type of short content you would like to see in a shorts experience offered by. Question Type: Ranking | Total Respondents: 1595

In vertical formats, Gen Z’s favorite content is short-form entertainment

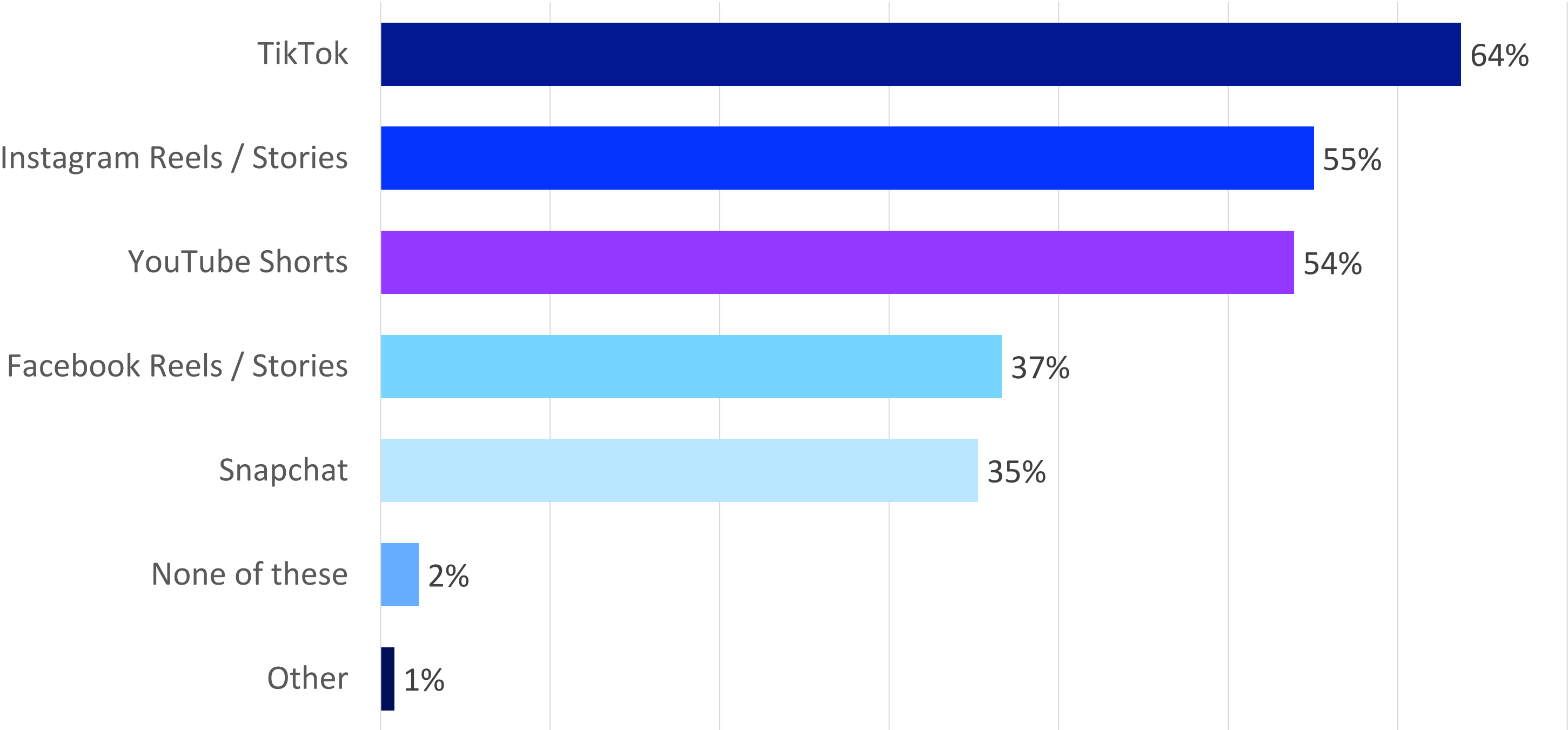
Music Videos were the #2 most-watched form of content in vertical formats



93. MQ48 The next few questions are all about vertical format videos. By this we mean any online video displayed in a portrait rather than landscape form. What type of content do you watch in vertical format the most? - Question Type: Multiple Choice | Total Respondents: 2000

Tik Tok is Gen Z's #1 platform for vertical video consumption

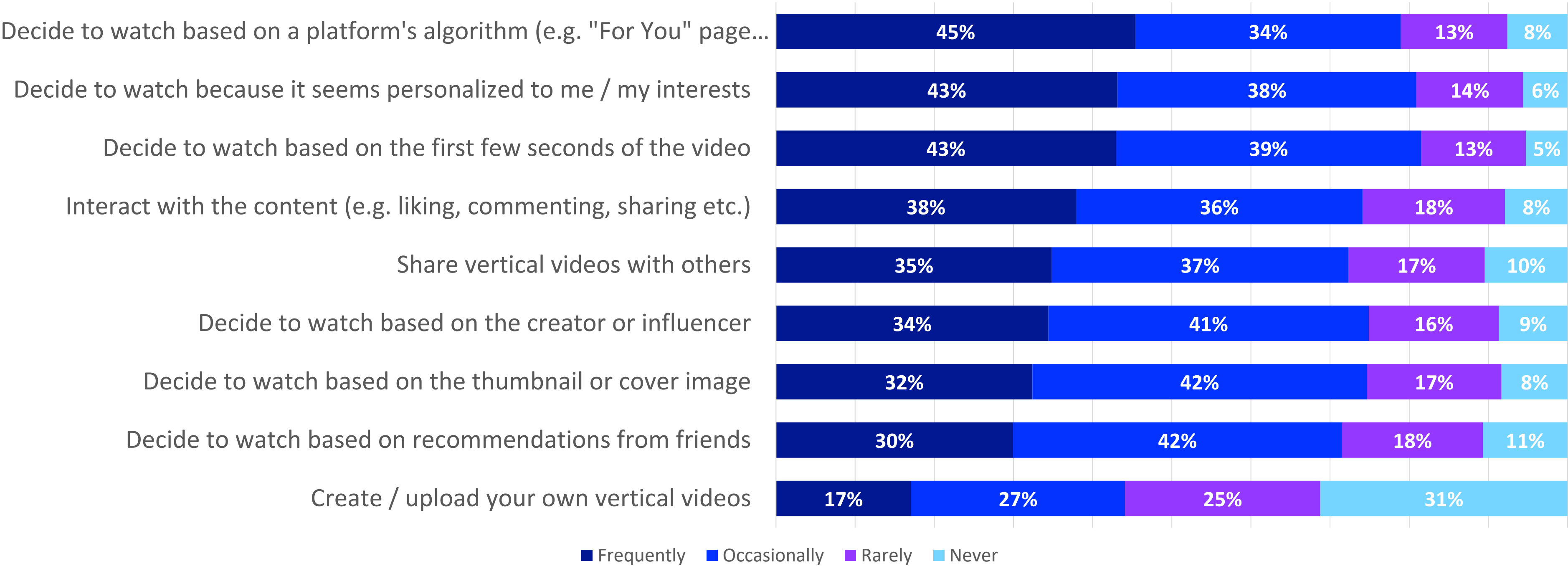
Instagram and YouTube are #2 and #3



94. MQ49 Which platforms do you use the most for vertical videos? Question Type: Multiple Choice | Total Respondents: 2000

Platform algorithms are the #1 driver of decisions to watch vertical videos

Personalization and highly-engaging starts are the #2 and #3 drivers of vertical video decision-making



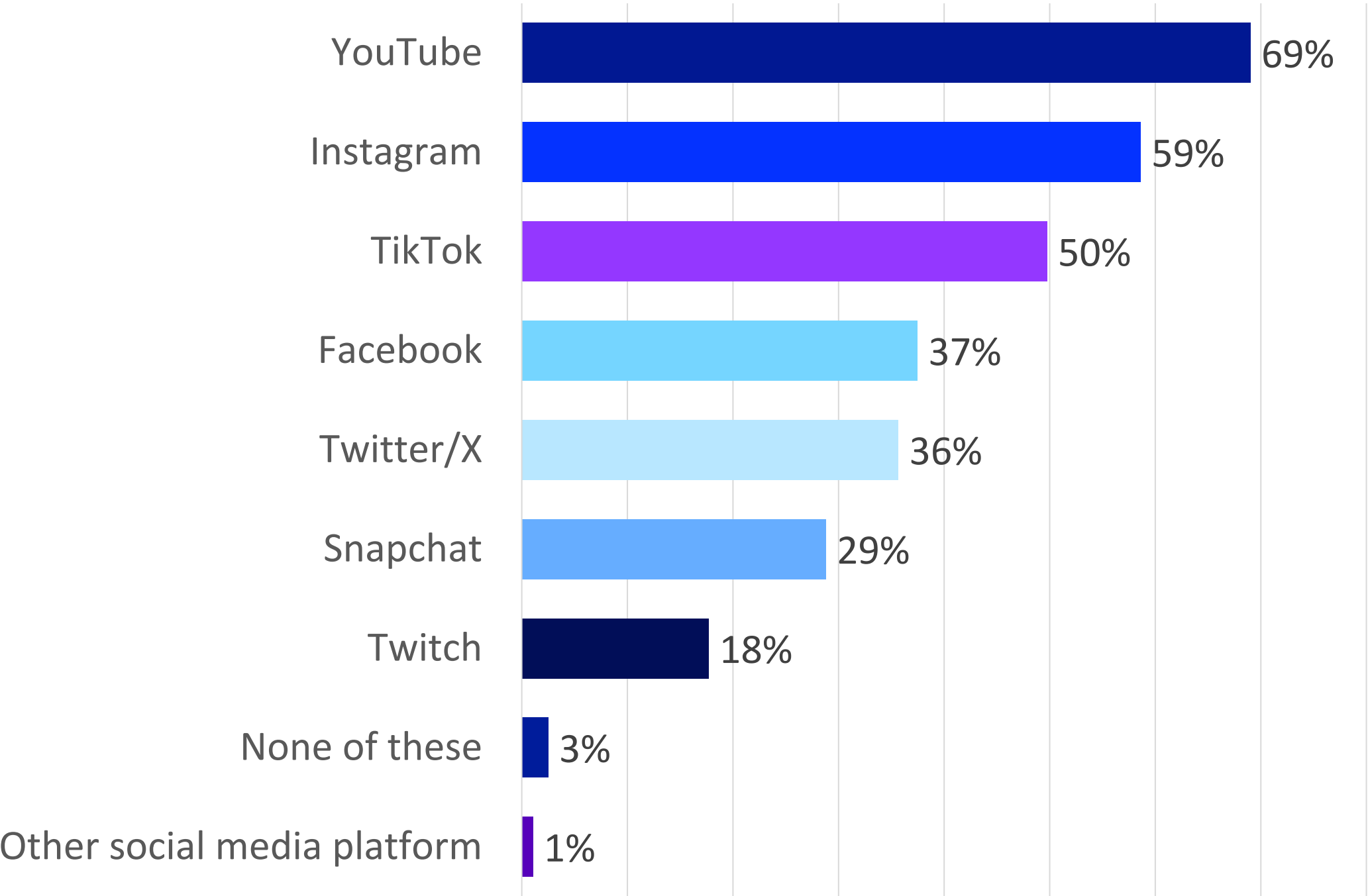
96. MQ51 How often do you take the following actions with vertical videos on social media? Question Type: Single Matrix | Total Respondents: 2000

The New Rules of Engagement – Sports are Social

Social feeds Gen Z's sports habits

YouTube is the #1 social platform for watching and engaging in sports

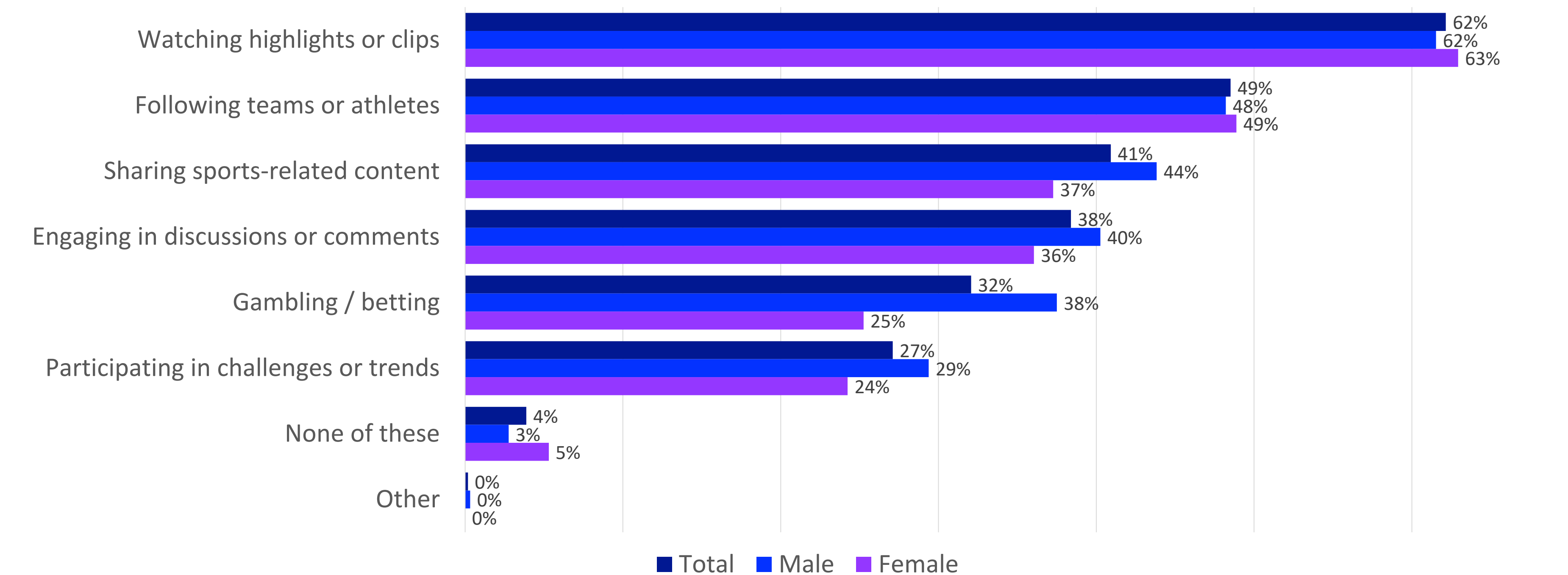
Instagram is the #2 social platform for watching and engaging in sports



76. MQ34 Which platforms do you use most to watch or engage with sports? - Question Type: Multiple Choice | Total Respondents: 1107

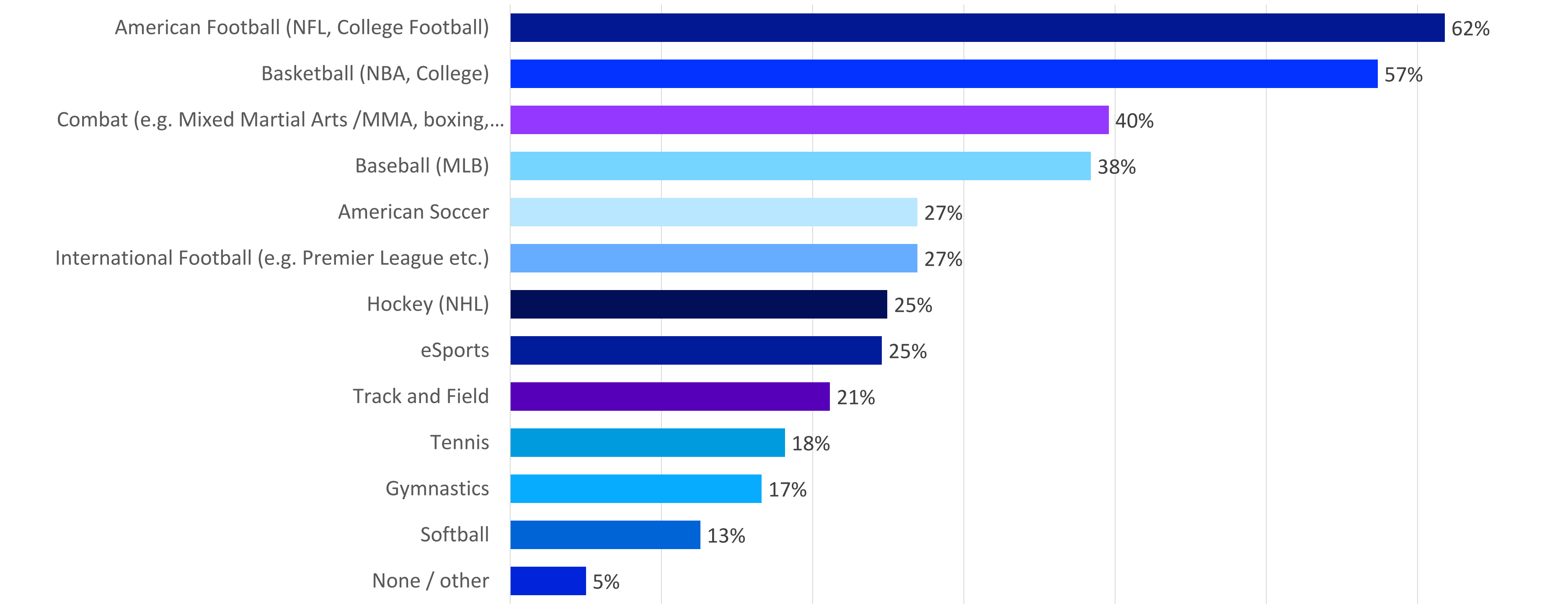
Watching highlights and clips is the #1 sports activity on social media

Following teams or athletes is the #2 sports activity on social media



77. MQ35 How, if at all, do you engage with sports content on social media? - Question Type: Multiple Choice | Total Respondents: 1107 | Time Range: From Jun 25, 2024 to Dec 19, 2024 | Hidden Info active

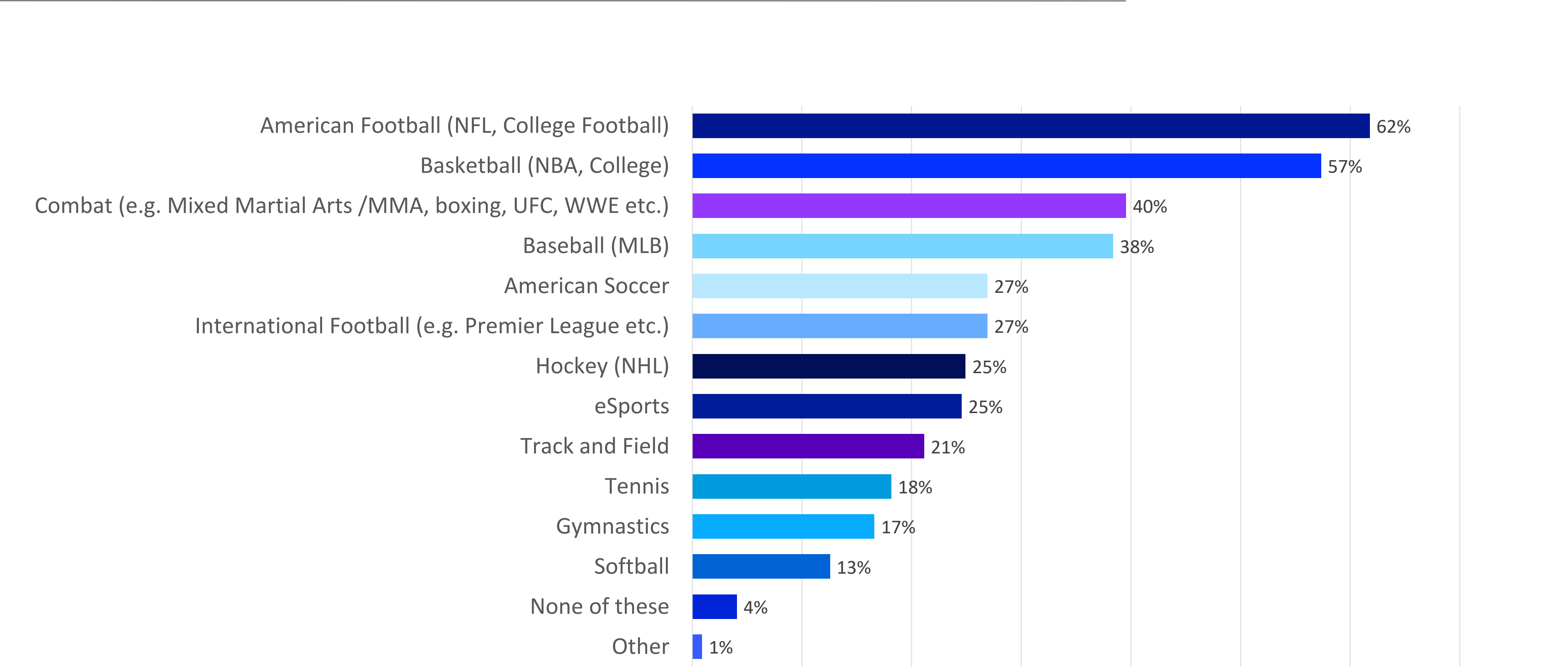
Gen Z's favorite sports are football, basketball and combat sports



71. MQ32x1 For each of the categories below, which types of sport do you follow? Question Type: Multiple Choice | Total Respondents: 1107 |

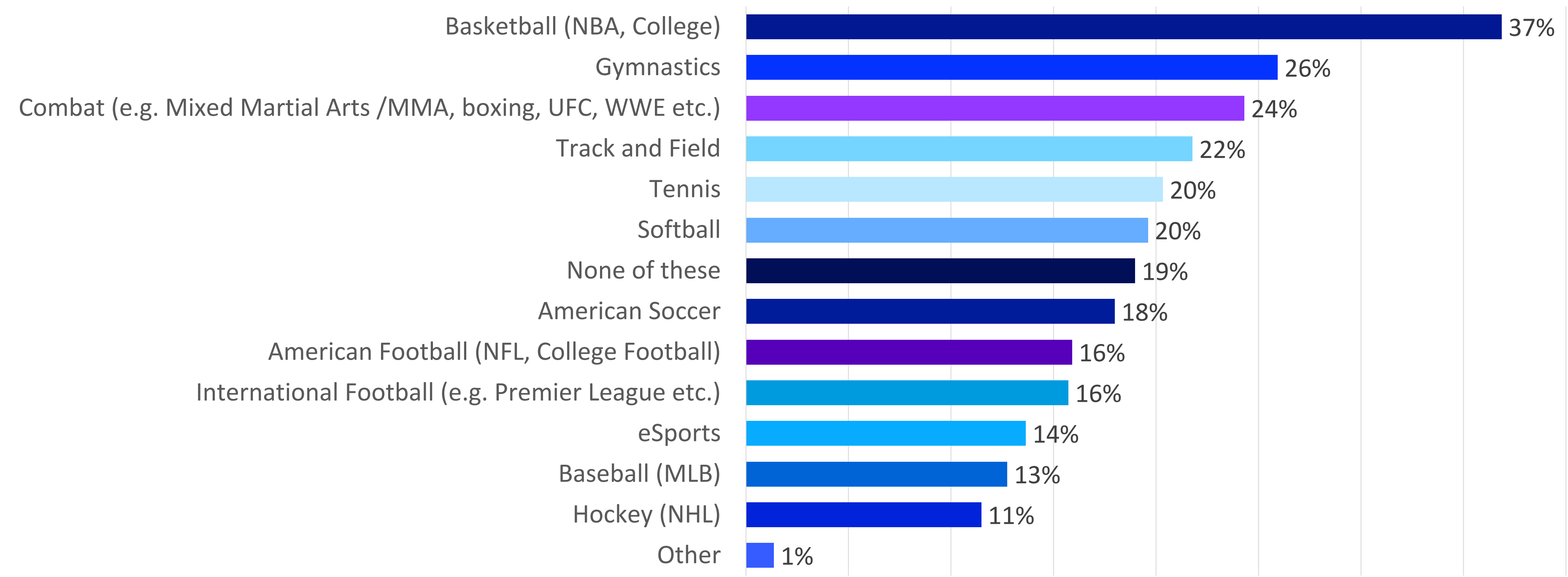
Time Range: From Jun 25, 2024 to Dec 19, 2024 | Hidden Info active

Gen Z's favorite sports played by men are football, basketball and combat sports



71. MQ32x1 For each of the categories below, which types of sport do you follow? Question Type: Multiple Choice | Total Respondents: 1107

Gen Z’s favorite sports played by women are basketball, gymnastics and combat sports



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