

February 2023

QUIRK GENERATION



RESET

Combining Research Tools With TikTok
to Better Understand Gen Z

TRAILER PARK GROUP

UNCOVERING — — CULTURE

Gen Z is known for being the first generation of digital natives. For years, insights have emphasized their love of authenticity, their preference for influencers over celebrities, and their commitment to social change. But as those talking points get recycled, this kind of data-based analysis is no longer enough. **Gen Z has found their own means for self-expression – and few marketers, analysts, and entertainment brands are really listening.**

As Gen Z affirms their place as the most sought-after generation, this report will move beyond the well-established clichés, and instead look at how this generation has evolved to be *even more digitally-centric*, and how any analysis of the generation is incomplete without going straight to the source, where their experiences manifest creatively:

TikTok.

Why TikTok?

TikTok is Where Culture Happens

TikTok is the leading app in influence, downloads, and usage.

- 1 billion active users worldwide¹
- 113 million monthly active users in the U.S.²
- 80% of users are between 16-34³
- 60% of users are Gen Zers⁴
- Users spend an average of 95 min per day (over 1.5 hrs) in the platform⁵
- Users open the app 8 times per day⁶
- 83% of TikTok users have posted a video⁷

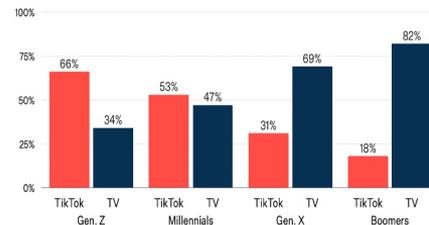
^{1, 3-4} TikTok

² Statista

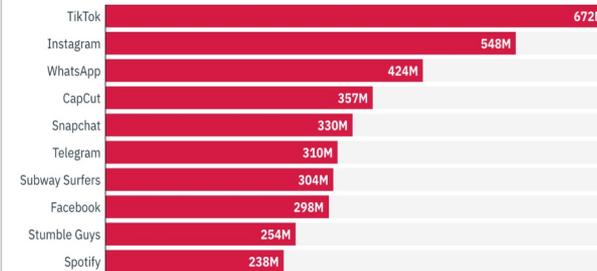
⁵⁻⁷ Sensor Tower

Most Gen. Z and Millennial TikTok users say they'd choose TikTok over TV

Percentage of responses, among TikTok users, by generation: If you could only watch TikTok or traditional TV/streaming shows, which would you choose?



Top 10 Most Downloaded Apps Worldwide in 2022



⁸ Toluna

⁹ Apptopia

Why TikTok?

What Makes TikTok Different?

TikTok has become a rare monolith in the social media space.

It's where trends begin and end.

It's where entertainment is discovered.

It's the active breeding ground for dedicated fandoms.

But what makes it different from other social platforms is the way its algorithm has fueled a sense of pure authenticity –

No matter the area of interest, passion is always celebrated and supported. When there is negativity on the app, whether in content or comments, it gets shut down almost immediately by users.

Instead, users are rewarded for sharing authentic truths from their experience & expertise – and they must share it as quickly and as compellingly as possible.

93% of users agree they can express themselves freely on TikTok.

Top 3 Adjectives users associate with TikTok:

- **Creativity**
- **Positivity**
- **Discovery**

*TikTok

Why TikTok?

A Tool For Creative Expression

Of course, every social media platform has become a place for creative expression. What's different about TikTok is the way it's given a generation a full suite of creative tools to express themselves it with.

Growing up amidst the social media dominance of Instagram and YouTube, Gen Z has quickly adapted to express themselves with more than just words – videos, photos and music have become the primary means of communication.

With unlimited means to create, it's no longer enough to just pay attention to what they're saying – we need to pay attention to *how they're saying it*.

At TPG, we've learned to approach TikTok as a source for thematic analysis – in which the tone and the underlying message allows us to better understand what Gen Z is going through in a way surveys and focus groups can't capture – and is essential for all generational analysis.

Brands, marketers, and entertainers, need to approach creative expression as an integral part of understanding, communicating with, and reaching Gen Z.

BUT FIRST: THE DATA

Generation Reset

HOW THE PANDEMIC CHANGED GEN Z

Growing up during the Trump administration, coming of age just in time for the Covid-19 pandemic, and emerging into adulthood as inflation increases, Gen Z's discontentment with the world has only grown — resulting in a fast-refreshing set of behaviors, values, and norms.

Behaviors

They're online. All the time. As they speed through an infinite library of entertainment and information, the pace of digital culture has accelerated to match them.

Values

They've always been committed to social advocacy. But now they're taking it a step further — and fundamentally questioning everything about the social and political status quo.

Norms

Gender and identity aren't the only things Gen Z is striving to upend: traditional notions of success, love, family, and work are next.

Generation
Reset:
How the
Pandemic
Changed
Gen Z

Rates of Zers living at home was already high – now it's the most common living arrangement nationwide.



In 2017,

1/3

of 18-to-34 year olds were living with their parents

*Census 2017 Data

Between March and April 2020,

2.2M

more Gen Zs moved in with a parent or grandparent

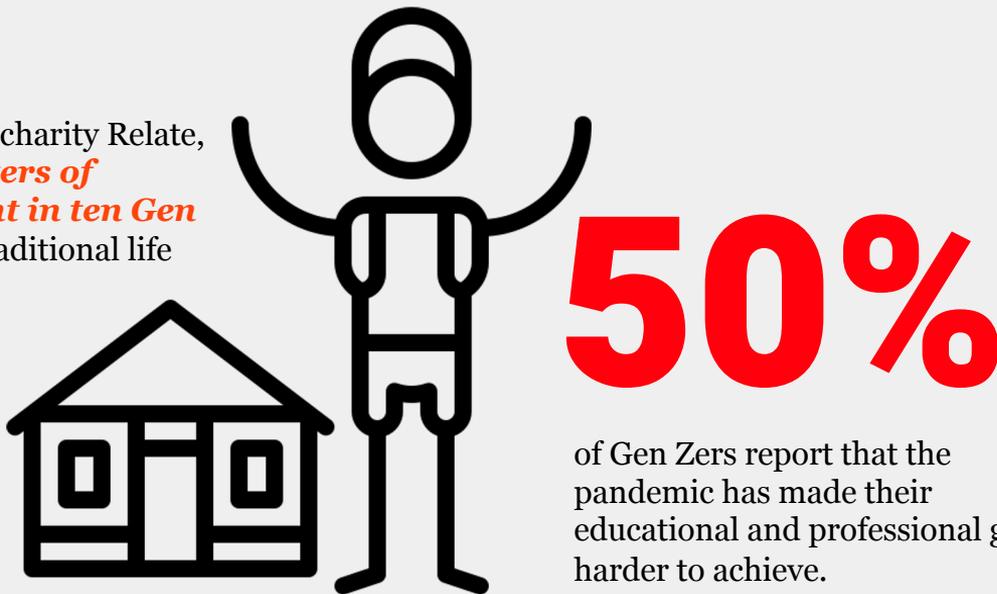
*Census 2020 Data

Generation
Reset:
How the
Pandemic
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Lifetime milestones like buying a house feel increasingly unattainable, despite continued pressure to reach them.

The survey, conducted by the charity Relate, found that over **three-quarters of Millennials and over eight in ten Gen Zers** feel pressure to reach traditional life milestones.

*Bloomberg 2022 Data



*Bloomberg 2022 Data

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Generation
Reset:
How the
Pandemic
Changed
Gen Z

As the world reopens, this generation struggles to socialize – time inside has only made a lonely generation *even more lonely.*



44%

of Gen Zers don't have
friends at work
*Wildgoose 2021 Data

40%

of young people are
anxious about socializing
*Prince's Trust 2022 Data

35%

have never felt more alone
*Prince's Trust 2022 Data

Generation
Reset:
How the
Pandemic
Changed
Gen Z

**So... What happens when
a generation of isolated &
disaffected digital natives
become ever-more desperate
to fill essential needs of
connection, progression, and
expression?**



We Don't Live Here Anymore:

ESCAPING REALITY IN — STYLE

TikTok allows us to see the nuances in generational attitudes, as Gen Z finds solace from daily stressors by retreating into pop culture, entertainment, and immersive experiences.

Escaping
Reality
in Style

What We Know (From The Data):

Growing up in the digital age has meant constant exposure to the threats and challenges we face as a global community. From a very young age.

Mental health struggles, existential dread, and a relentless tension between hope and reality underlie this generation's experiences both online and off.

- **Over half the consumers ages 16-25 think “humanity is doomed,”** according to SSRN global study. “This is an emotionally mentally healthy response. The external reality is increasingly frightening,” according to the study’s author. (New Republic)
- **Gen Z’s self-image is morphing:** “What is taking it to the next level with these filters is it’s not just seeing an image of a celebrity who is unrealistic and measuring yourself against that person, it’s measuring your real self against a pretend image of yourself,” explains, child psychiatrist. Dr. Helen Egger. (Forbes)
- **And despite constant change and upheaval...** “I’ve always felt like we were living in a simulation, and nothing is real but, like, it is real. Sort of an alternate, distorted reality. My friends often feel like that too. So, it’s like ‘what am I even doing with my life?’ Even though you are living your life.” Sarah H, 21, NYC

What We See in the Expression:

A STATE OF



DISSONANCE

Escaping Reality in Style

Romanticizing Your Life

Now more than ever, Gen Z is turning to TikTok to share to others, but mainly to themselves, how their life looks when romanticized. By using songs and sounds to show different moments in a day and/or life, one is able to make their life seem straight out of a fantasy.



CAMCORDER AESTHETIC

Romanticizing can also mean a vintage look and feel to TikToks. For this example, a couple shared footage taken on a camcorder to show precious moments in their relationship.



A DAY IN A LIFE

Quick cuts of one's everyday life and what they see. These are usually paired with trending songs/sounds to feel more cinematic yet with a personally diary approach.



CAPTURING THE MOMENT

A picture can capture a thousand feelings. By taking photos during moments that can go by in a second, this approach helps stretch a point in time. This makes life seem a lot more prized, nostalgic, and romantic.



THE INTRODUCTION

A newer addition to romanticizing, introducing one's friend group in a slow-panning camera movement with the world still functioning around it is an effective way to make a group's life feel like a film.

Escaping Reality in Style

Embracing the Absurd

It's no surprise that during these "unprecedented times" Gen Zers have turned to absurdism. "Rooted in Albert Camus' belief that people should embrace universal chaos in spite of it," the philosophy aptly captures the overwhelm they've been exposed to since childhood.

Filled with determination to correct the mistakes of the current status quo, some Gen Zers have cast themselves as harbingers of long-awaited reform while others opt for full-blown escapism.



- **“Gen Z hasn’t just returned to absurdism, we’ve embraced it...Absurdism... fits especially well with the status of young Americans,”** writes college sophomore Marnie Muñoz.
- **Hallucinogen use with college students is at the highest level since 1982** and more than five times the lowest rates in the mid 2000s according to according to the latest data from the annual Monitoring the Future survey, carried out by the University of Michigan.

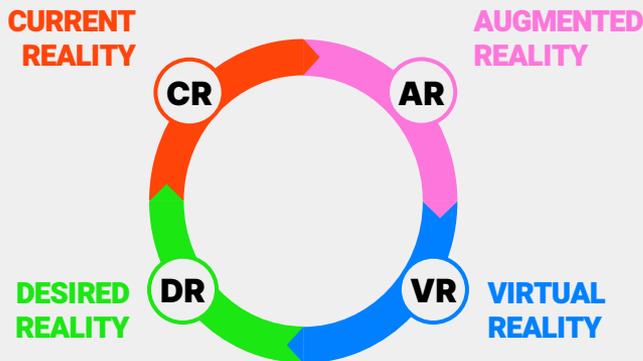
Escaping
Reality
in Style

Shifting To A New Reality

One year ago, **#ShiftingRealities** had 26.1 Million views on TikTok. Today, it has over 5 Billion. To call it a “trend” is reductive. It’s the next iteration of our relationship to altered states.

Shifting relies on the belief that there are infinite realities, and the act of shifting directs your consciousness to a different reality. It appears to be a combination of meditation and lucid dreaming, but shifters on TikTok and Reddit insist it’s different.

Alexa, 16, explains, "So if you're lucid dreaming, it's a dream and your subconscious is still in your current reality. But when **you're shifting, you're literally shifting your subconscious and your awareness to another reality in which you already exist...**you are essentially living another life, which is 100% as real as living your life in your current reality."





WHAT THIS MEANS FOR YOU

What
This
Means
For You

Takeaways

A THEMATIC INTERPRETATION OF A GENERATION

For a generation that is so multifaceted and digitally focused, data and research is the tiniest part of the story.

TikTok conveys not just what's being said but the way they're expressing it and the emotion they're eliciting through their content.

A STUDY ON THE MEANS OF EXPRESSION

TikTok has provided the creative tools to express themselves, allowing it to convey way more than people just talking about their lives and dislikes.

It's a study on the means of creation.

QUESTIONS

FOR TPG STRATEGY?

To see our full “GENERATION RESET” presentation, in which we use TikTok to better understand the nuances of Gen Z, please reach out!



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