

TUNNL

# Decoding the Digital Native

## DECODING THE DIGITAL NATIVE

## How the Research Started

Last year, Tunnl undertook both a pilot study on men and a deep dive segmentation on both men and women with our partners at Precision Strategies. Our goal was to understand more broadly the concept of the Manosphere – this loose network of online communities where things like masculinity and modern identity might be discussed across podcasts and social networks and online forums. What we found gave us a framework for how young people are actually consuming media and how their current identities play into that media consumption.

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# The Center of Gravity is Shifting



## Google owns male attention.

YouTube has become the new prime-time for men.

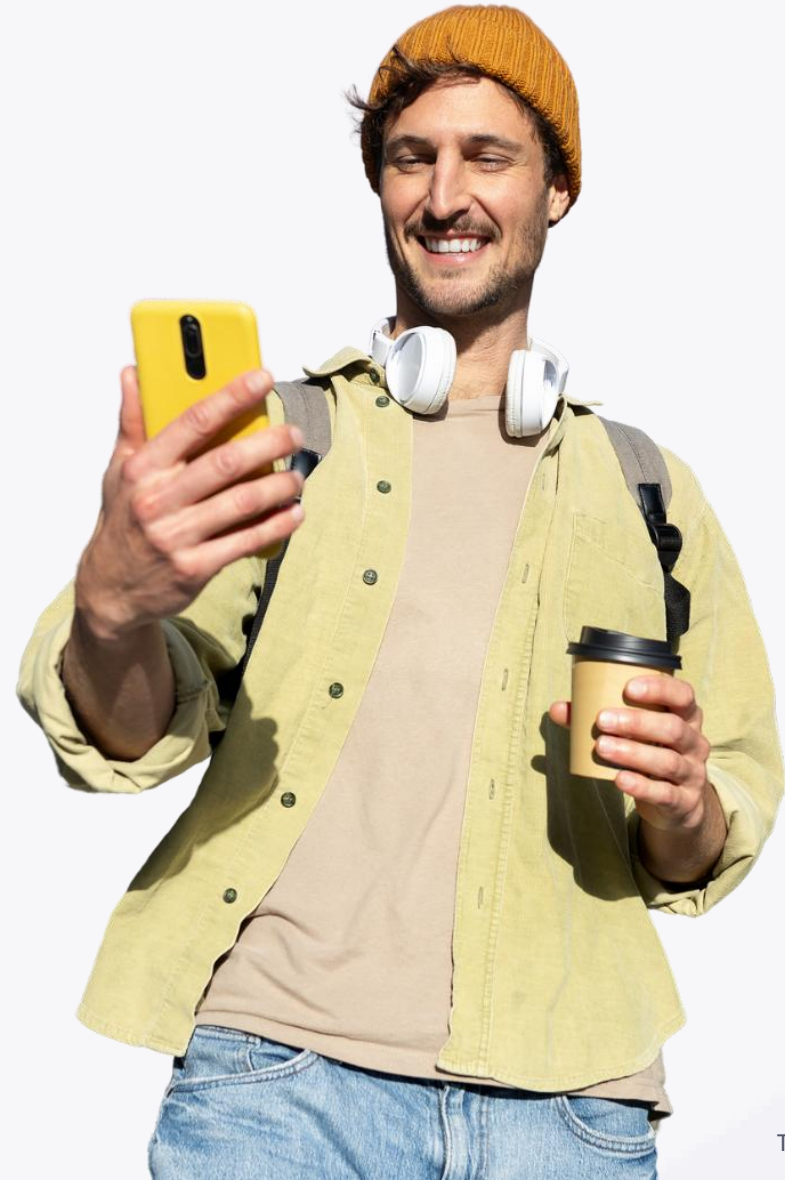


## Meta mostly dominates with women.

While men are gravitating toward YouTube, Women are clustering around Meta's platforms like Facebook and Instagram.

### YOUTUBE AS THE NEW PRIMETIME?

**Nearly 9 in 10 men are using YouTube at some point during the week and almost 60% are heavy users spending 6 or more hours on the platform. Gen Z and Millennial men across every racial group report watching more YouTube on average than any other platform.**





## Instagram and TikTok dominate with young women.

52% of women call themselves frequent users of Facebook, and 85% use the platform weekly. It is where they maintain social ties, follow community updates, and consume a mix of news, commentary, and lifestyle content. But, among Gen Z and Millennial women, Instagram and TikTok anchor their daily digital routines; where at least 7 in 10 use one or both platforms weekly, and in some segments the figure approaches 9 in 10. These platforms are not just content feeds; they are engines of identity formation.

PODCAST CONSUMPTION HAS A LONG TAIL

## Long-Form Listening and the “Clipification” of Podcast Content



### 6 in 10 Men Have Some Exposure to Podcasts During the Week

- For men with high podcast consumption, on average, about 12% are consuming 6 or more hours of content a week.
- This average is heavily informed by **younger generations**, as older ones only show about 5% consuming 6 or more hours a week of podcast content.
- Here, Millennials have the biggest podcast consumption with **Hispanic Millennials consuming 2x more** than any other group.



### 5 in 10 Women Have Some Exposure to Podcasts During the Week

- But when you look at the highest podcast consumption, on average, **only about 8% of women are consuming 6 or more hours** of content a week.
- This changes for the youngest generations, Gen Z and Millennials Women are **25-35% more likely to be high consumers** of podcast content.
- **For Black Gen Z women, it's 75% more.** If they're politically engaged, that number goes UP.

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# Added Cultural Context



## Faith Findings

**Over half of adults say faith guides their life in some way.**

But nearly all Gen Z cohorts fall under this average in how their view faith and spirituality, except one group. *68% of Black Gen Z men and 72% of Black Gen Z women say that faith guides their lives.*



## Economic Empathy

**About 1 in 3 adults have relied on some form of gig or side hustle income.**

Among Gen Z, these numbers rise over 50% across genders and across racial cohorts, *who are feeling the burden of a tough economy.*



## Content Concerns

**Over half of all adults say the content recommended is getting more controversial over time.**

This is felt most by Millennials cohorts, and when broken out by party, is experienced by right of center millennial men, and left of center millennial women.

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# Questions to Audit Your Engagement Strategy



**Are you meeting digital natives where they actually are across channels, or where you assume they are?**



**Are you building one strategy for Gen Z and Millennials – or actually reading the room within these groups?**



**Are your audiences defined by who they are on paper, or by what they care about in the real world?**



**Is your content designed *for* the platform and the way they consume or just being pushed onto the app?**

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