

WE ARE GENZ

THEIR POWER AND THEIR PARADOX

An Immersive Study

WE DIDN'T KNOW GEN Z...

Sure, we had some ideas about Gen Z—the generation born roughly between 1995 and 2010. But as they begin to enter the workforce and surpass Millennials in terms of the overall world population, marketers are trying to get a handle on who they really are, what they think and how they behave. We've seen studies labelling them as, amongst other things, [entrepreneurial](#), [activists](#) devoted to social good and more clean-cut than previous generations—in that they [don't drink or do drugs](#). They seemed a little too good to be true. So, as the generation that is set to be the most financially [powerful and diverse demographic](#) comes of age, we wanted to get under their skin and find out what they're really like, how they form and maintain connections, both online and offline, and understand what is really meaningful to them. We also wanted to understand more about their claimed behaviour versus their actual behaviour. Is it true that Gen Z are particularly [ethically and socially conscious](#)? Are they as straight-laced as we've been led to believe? Do they really take an 'activist' approach to brands, their life and their wider community?



SO THIS IS WHAT WE DID.

Approach.

We could have chosen any type of research, from social listening to surveys to focus groups, but we opted for a more immersive approach: ethnography—a qualitative research method that comes from anthropology. Ethnography relies on participant observation, where the ethnographer becomes completely immersed in the subjects' way of life.

We knew that by observing them in real life and capturing their non-verbal cues and triggers, we would get the closest look at their real selves versus what they claim to be, which is the sort of data you get from questionnaires, surveys and quantitative research. We identified 12 Gen Zs from all over the UK; we met them, their families, friends (and pets), and immersed ourselves in their day-to-day activities. We went to their houses, hung out in their rooms, had a peek in their wardrobes and had a good old chinwag. We validated the study with supplementary data to give a fuller and richer context of their lives.

What we found was fascinating.

As with most things in life, the reality isn't as simple as the headlines suggest. Yes, we found things to back up some of the previous perceptions of the

demographic and, at the same time, we found things that challenged those ideas.

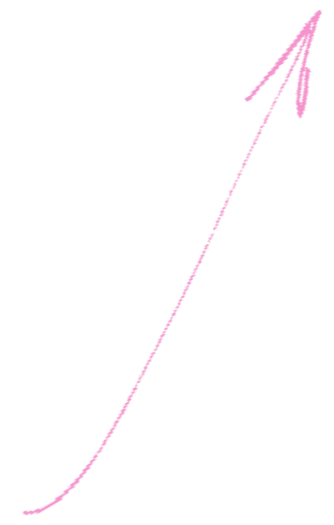
It turns out Gen Z is a paradoxical generation, shaping their world view through what seems like a kaleidoscope of contradictions.

They are trying to make sense of the polarised world they find themselves in: a hyper-connected world in which they can communicate in an ever-increasing number of ways. They are forging new identities by fracturing the cultures that came before them.

What's most surprising is that Gen Z often feel more divided than ever which is a result of them uniting and forming communities around niche subcultures. Even for this new generation, old tribalistic instincts kick in.

We discovered six main themes that we'll interrogate in detail. These are:

- Conscious contradiction
- Learn/unlearn
- United and divided
- Valuing permanence
- Inverse influence
- Hyper-hybrids



WHAT'S INSIDE THIS REPORT?

A deep dive into the world of Gen Z using an immersive research technique: ethnography. We validated the study with supplementary data to give a fuller and richer context of their lives.

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TREND

CONSCIOUS CONTRADICTION

Gen Z actively challenge their own mindset and refuse to be pinned down to a binary world. Brands are going to have to learn to accept this.

TREND

LEARN / UNLEARN

In a post-truth, fake news world, Gen Z crave new ideas, and are reimagining the way they inform and educate themselves. How can your brand challenge the way they think?

TREND

UNITED AND DIVIDED

Gen Z have found new ways to speak their mind and find the like-minded in the digital age. For brands, it's all about finding the right niches.

TREND

VALUING PERMANENCE

Consuming and sharing content has never been more transient. Gen Z are now putting more emphasis on the physical. For brands, digital can't be everything.

TREND

INVERSE INFLUENCE

Influence is still key to your marketing strategy but it's now time to focus on credibility if you want to get Gen Z on side.

TREND

HYPER-HYBRIDS

Gone are the days of definable subcultures; Gen Z can't be boxed by just one definition. Brands must also match this fluidity.

MEET

GENZ



Carlotta Franques
🏠 London

🔍 Carlotta, 20, is a fashion student from London who used to play competitively for Tottenham Hotspurs.



Ruby Pluhar
🏠 Glasgow

🔍 Ruby, 22, loves practising the ancient Japanese art of Reiki. When she isn't doing that, she's studying photography.



JJ Hanks
🏠 Wakefield

🔍 JJ, 18, is a music student. He is currently transitioning and uses Instagram to document the changes testosterone makes to his voice.



Zack Hipps
🏠 Manchester

🔍 Zack, 20, is marketing student who also loves food blogging. Interesting fact: Zack only wears yellow clothes.



Elise McGone
🏠 Solihull

🔍 Elise, 21, is a marketing student from Solihull. Before getting into marketing, she used to be a competitive ballroom dancer.



ADAM MCKINSTRAY
🏠 GLASGOW

🔍 Adam, 20, is an architecture student. He sells limited edition shoes online to make extra cash. He once sold a pair for £3,000.



Darius Karuga
🏠 London

Q Darius, 19, is a photography student, who would most like to concentrate on capturing images of public disorder and rioting.



AFUA O.A
🏠 BRISTOL

Q Sociology student Afua, 18, is terrified of flying—still, she's managed two flights in her life.



ALEX KESNER
🏠 LONDON

Q Alex, 17, studies fashion. He loves three things: clothes, partying and walking his dog, a huge and fluffy old English sheepdog.



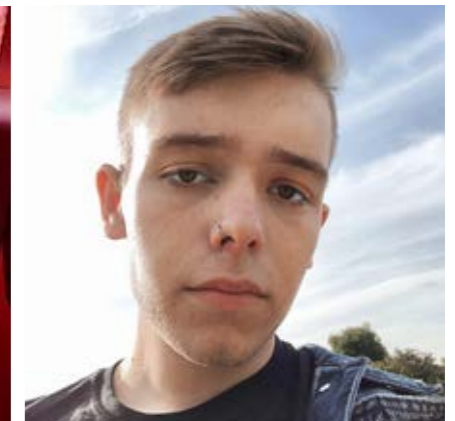
Jamie-Leigh Mynett
🏠 Solihull

Q Jamie-Leigh, 23, is a care worker. She collects Disney globes and elephants. She has more than 50 now.



JAKE CAVENEY
🏠 MANCHESTER!

Q Jake, 23, is a freelance comedy writer who taught himself guitar from YouTube videos. His band is touring the UK soon.



Jamie Maycock
🏠 Birmingham

Q Jamie, 19, is in between school and uni. He's a K-pop fanatic, especially when it comes to BTS also known as the Bangtan Boys.



CONSCIOUS CONTRADICTION



Videos. Tweets. 'Grams. Content. Stuff. Whatever you call it, the sheer amount of digital information we're exposed to, and expose ourselves to, is incredible.

We see up to [5000 ads a day](#), and nearly 64.5% of internet users get their [breaking news](#) from social media.

It's no longer enough just to consume—we're attempting to hold informed opinions, and make decisions at lightning speed across this breadth of content.

While we're expected to engage with complex and conflicting issues, it's getting harder to do so properly because of the sheer volume of [content on the internet](#), and the push to condense a lot of it down into a nice, neat, 5-second, 280-character package.

It's no wonder then, that we feel we live in a [more polarised world than we did](#), where being a member of 'the other side' is enough to provoke annoyance and spark hatred.

This is a phenomenon known as '[moral tribalism](#)', and it's not limited to the political arena. Brands are also stepping into these areas, with the likes of [Heineken's Worlds Apart campaign](#) and [Nike's support for Colin Kaepernick](#), all created to appeal to target consumers.

**IN A WORLD
WHERE OPINIONS
ARE A CURRENCY,
WHAT EFFECT
DOES THIS HAVE
ON THE NEXT
GENERATION?**



"I'M ALWAYS LISTENING TO A VARIETY OF MUSIC. RIGHT NOW I'M LISTENING TO JAMES BLAKE'S NEW ALBUM, AMBIENT REIKI MUSIC AND I ALSO LOVE NIGERIAN DISCO."

*Ruby Pluhar
Glasgow*

Our Gen Z group are actually pretty happy with contradiction. They feel fine holding two sides of an idea in their head at the same time, seeing both sides of an argument.

We observed how they might say they 'hate' a brand, but a moment later they show off a product from that particular brand, justifying it with, "Oh, but my brother bought it for me."

"MICHAEL KORS SEEMS REALLY EVIL TO ME... SOMETHING ABOUT THE BRAND DOESN'T SIT RIGHT WITH ME. BUT MY WALLET IS FROM MICHAEL KORS AND I LOVE IT, LOOK HOW PRETTY IT IS."

ELISE, 21 YEARS OLD, STUDENT, SOLIHULL

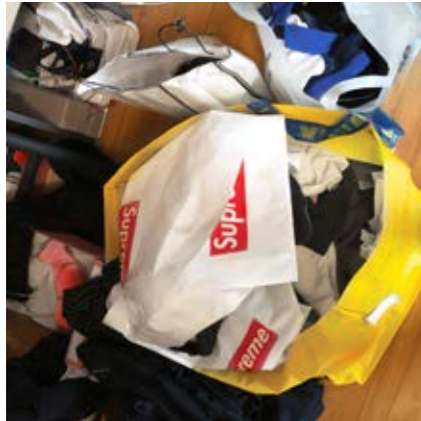
Some of our interviewees claim to be very socially conscious, but they would still follow brands that have been in the middle of social media storms due to their unethical actions. Take L'Oreal, who dropped their first trans model in 2018 following previous controversial comments made on social channels:

Munroe Bergdorf is one of my biggest inspirations... but I really like L'Oreal's Instagram page so I would consider following them despite the scandal."
Afua, 18 years old, student, Bristol

Embracing a mix of viewpoints and striving for a more nuanced way of thinking has enabled Gen Z to create kaleidoscopic identities.

Music consumption provides another great example. According to [Sweety High's 2018 Gen Z Music Consumption & Spending Report](#), this generation listen to more diverse music than ever before with 97% of Gen Z females saying they listen to at least five musical genres on a regular basis.

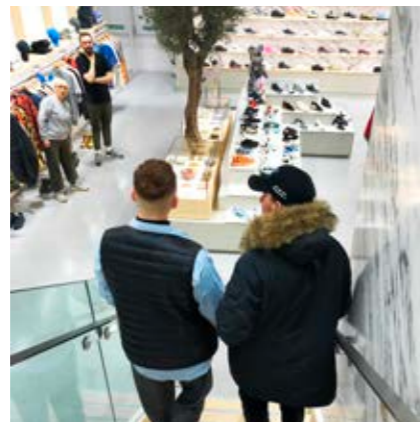
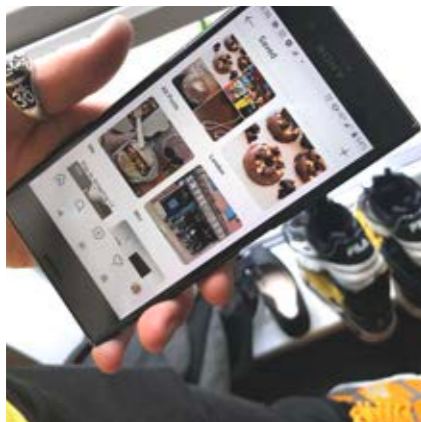
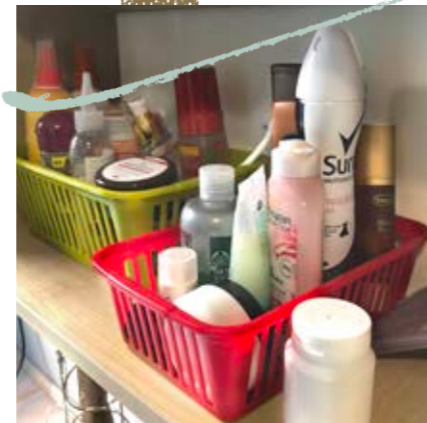
97%
OF GEN Z FEMALES SAY THEY LISTEN TO AT LEAST FIVE MUSICAL GENRES.



The key thing is: they know they have paradoxical viewpoints, and it doesn't seem to bother them in the slightest. They're actively switching, not absentmindedly contradicting.

This is their way of opposing moral tribalism, challenging conventional definitions, and rejecting the current duality of traditional and non-conformist values and behaviours.

For them, it's not either. It can be both. They refuse to be pinned down, to be put in a binary world.



IMPLICATION FOR BRANDS

Gen Z are still shaping their point of view on the world. As we've seen, their relationship with a brand can be a complex, love/hate affair.

They use brands as a way of figuring themselves out, and leverage the ones they love as a form of expression. However, they don't want to be told what to think. They're expecting brands to be a part of their experience and not the full experience.

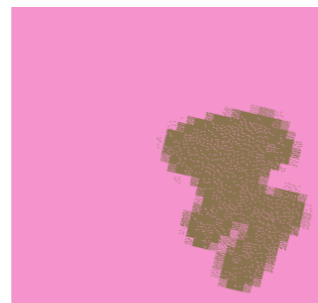
The idea of playing an active role in your brand—e.g. shaping product direction or CSR policies—will be important to them. Interacting with them through the likes of co-creation campaigns will have impact, letting them feel they've contributed. This will help to foster brand love.

Even if Gen Z views and values are at odds with yours, as a brand, that doesn't mean they won't buy your products.

Brands need to understand their own priorities—to be the brand they talk about but don't buy, or the brand they buy but don't talk about. While the dream is inevitably 'both', accepting the contradiction will allow brands to embrace the role they play and focus efforts according to priorities.

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LEARN / UNLEARN

If you're of a certain age, you'll remember the arrival of the internet in schools. Shiny, otherworldly and, well, slow. But Gen Z has a different experience of the internet: it has always been front and centre, and super fast. Rather than relying on it as a source of info though, Gen Z are actually less likely than Millennials to blindly [trust information](#) simply because it's online. 'Fake News' has become a throwaway punchline to us, but Gen Z take it seriously.

"There is so much fake news out there. It has gotten like Black Mirror really. Brexit, politics... People keep sharing fake news."
Jake, 23 years old, Manchester

Mistrust has sharpened their filters. They know that there's not one, single, version of the truth; and they explore new directions, interpretations and truths not taught by the 'establishment'.

This hunger to seek out trustworthy sources has helped Gen Z to realise they have access to anything they want to know, alongside traditional schooling. Unlike previous generations, they have been able to access this information from the moment they were ready to use it.

And so, they have developed a different relationship to the internet, and learning in general.

They've been helped, in part, by improved technology in the classroom, which has made education more individual. Interactive whiteboards and the option to replay lectures means students can learn at their own pace, and choose the aspects they want to focus and build on.

This is supplemented by the emergence of alternative educators online. Initiatives like [YouTube Creators for](#)



[Change, Be Internet Citizens, The Genius Hour movement, TED-Ed Clubs](#) that challenge traditional views and encourage students to build more critical judgment.

The internet has provided Gen Z with innumerable sources and methods for learning almost anything they want to.

Increased critical thinking skills were highly visible in our Gen Z group.

They aren't satisfied with just what is given to them. They challenge it and build on it—even if it means clashing with other people around them. It's this challenge to the establishment and the old way of thinking that is key to this generation, suggesting a shift towards a growth mindset.

"They don't really teach you British Black history in this country at school. That's why I felt I had to go online and look for it myself. I started finding Black British female activists on Instagram. Particularly @theslumflower and @redieeddolodge." Afua, 18 years old, Bristol

In order to fully "embrace her Ghanaian heritage and blackness", Afua felt she had to unlearn the whitewashed version of Black history that she was taught.

The best way for her to find her own truth was through the influential voices she found on Instagram.

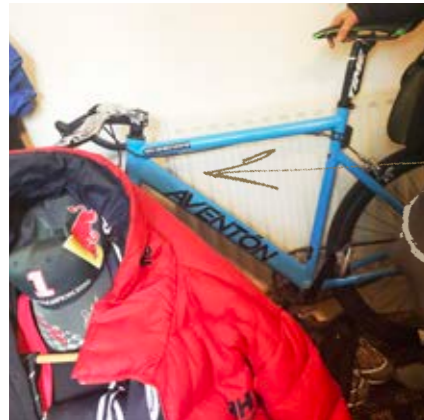
Similarly, a group of [100 Cambridge students](#) called for the university to include more black and ethnic minority writers in its English Literature curriculum, leading to a row over race.

At the same time '[decolonising the curriculum](#)' events across the UK and '[re-imagining school](#)' TED talks have become very popular. Gen Z want to change and evolve how others around them learn too.

"THERE IS SO MUCH FAKE NEWS OUT THERE. IT HAS GOTTEN LIKE BLACK MIRROR. BREXIT, POLITICS... PEOPLE KEEP SHARING FAKE NEWS."

JAKE CAUENY
MANCHESTER

JAKE CAVENEY
MANCHESTER!



While the generations that went before them were taught they had to have the right answer to be successful, Gen Z are more interested in learning and achieving with personal growth in mind.

"I wanted to buy a bike, but I couldn't find the one I wanted and that I could afford, so I built it myself watching YouTube." *Darius, 19 years old, London*

"There's a channel called 'Ukulele Teacher' that I used to watch a lot. If not I'll type 'how to play this chord' or 'how to play this song'." *Jamie, 19 years old, Birmingham*



YouTube and Instagram are key learning tools, with the former acting as a source of knowledge and entertainment combined.

"YouTube: If it was to disappear, I'd be sad. Nothing can replace YouTube (Netflix could be replaced with Amazon Prime, for example), I have used YouTube to learn languages and instruments. I love watching people eat food, feels nice eating with someone." *Jamie, 19 years old, Birmingham*

IMPLICATION FOR BRANDS

If you're looking to engage with Gen Z you can't be afraid to have an opinion.

They connect with brands that push them, challenge their critical thinking and show them fresh perspectives. Brands that help them unlearn.

Prepare yourself for a two-way exchange.

If they challenge you online, it needn't be interpreted as an attack. Gen Z will happily engage in debate and respect brands for having an opinion, even one they don't agree with.

This offers opportunities for brands as facilitators—consider how you could bring your audience together to learn from each other. How could you spark those conversations?

Brands have the opportunity to educate Gen Z

Give them means to interact with your brand without the push to sell. Provide practical skills, tips and videos they can use to learn what they want. Make your brand the go-to resource and the voice of authority on particular topics.

If you help them, there is a potential to build trust with a demographic that is both huge and influential but also critical and hard to persuade.

49%

OF 12-15 YEAR OLDS

NOW THINK THE NEWS THEY SEE ONLINE IS MOSTLY TRUE, COMPARED WITH 87% 10 YEARS AGO

Source: <https://thinks.ipsos-mori.com/trusting-cynical/>



**UNITED
AND
DIVIDED**

There's no doubt we're living through a period of big change. We've never been more open to discussions around diversity and inclusion, but we've found ourselves in a society with a cultural divide, as new and old collide.

That's brought a whole load of uncertainty to Gen Z. The potential for conflict has risen, driving this young generation to look for spaces where they can unite and feel secure in the way they see things, the way they talk about them and the way they behave. (Source: Foresight Factory).

'Snowflake' is often used as an insult when younger generations are seen as sensitive. 64% of GB adults agree with the statement: "People are offended too easily." (Source: Foresight Factory/Trending_19 report).

So Gen Z seek out safe areas where they can be free to discuss ideas openly and honestly, without the risk of censorship or being accused of over-sensitivity.

For these reasons, Gen Z has begun to turn inward and focus on small groups of friends who influence them. This comes at the cost of cutting out influence from a wider range of people. (Source: [Future of Others](#), Kantar Consulting, podcast)

Because Gen Z recognises division of all kinds (race, equality, socio-economic) their response is to look for unity in smaller, easier to reach places. Many of our Gen Z interviewees were doing this in their local community.

"I grew up on this street. I know all the neighbours, and because police weren't doing enough... I decided to join the residents association... I help out with neighborhood safety."
Jamie Leigh, 23 years old, Solihull



"I'M PART OF THE YOUNG CREATORS UK IN LAMBETH... THERE'S SEVEN OF US NOW—WE'RE MUSICIANS, PHOTOGRAPHERS, FILMMAKERS... PART OF THE YOUTH COLLECTIVE."

*Darius Kanuga
London*



Of course, this behaviour also translates into their digital world. There's the phenomenon of 'finstas', (fake Insta profiles), which Gen Z create to share moments from their honest lives, in contrast to the edited version that goes on their main Instagram profiles.

Then there are private Facebook groups and other types of communication, such as 'niche memes'—social in-joke content, designed to appeal to a small number of people who 'get' the creator.

50% of our interviewees have a finsta account, and share it with a select, intimate group. It gives them freedom to express their true feelings, unfiltered pictures and even risky behaviour.

Nadya Okamoto, founder of the non-profit organisation, PERIOD, summed it up nicely in her SXSW 2019 talk. She observed that finstas represent small tribal identities—and because they are unfiltered, Gen Z feel closer to the people they connect with on these accounts.

"I set my finsta up a year or two ago—I have loads of stuff I found funny that I didn't want to post on my real Instagram [...] only my close friends are on it. It's me just being stupid. Lots of people have finstas—they all mix it up a bit."
Carlotta, 20 years old, London

"I used Facebook group pages to connect with people who owned parrots around the UK for my uni degree show. It was a good way to find people who had such a specific interest."
Ruby, 22 years old, Glasgow

Despite the impersonal nature of these social platforms, Gen Z are finding ways to form their own micro-communities.

It's an interesting cultural tension—on the face of it Gen Z appear divided, but underneath they are more united than ever: united around smaller topics of interest, their geographic locations and how they present themselves online.

IMPLICATION FOR BRANDS

Platforms are meeting people's needs for smaller and more intimate connections. In a blog published on Facebook, in March 2019, Mark Zuckerberg said, "I believe the future of communication will increasingly shift to private, encrypted services where people can be confident what they say to each other stays secure [...]." Facebook looks like it will evolve to more closely resemble WhatsApp.

As Gen Z becomes more concerned about connecting intimately with smaller, private groups, brands will have to connect on a smaller scale.

Embrace talking to Gen Z one-to-one wherever you can.

Speak about the initiatives your brand is running. Stop thinking only about London, go more granular, across the UK. Support their causes and offer means to credibly impact their lives.

Gen Z are proud of where they come from.

Tap into this pride, by collaborating with emerging talent, and showing you understand how that area or city is different from others: what makes it unique. Understand they want to see the impact of the changes you make on a local level.

Follow in the footsteps of successful campaigns

such as Nothing Beats a Londoner, adidas vs. TfL and Make Bristol Shit Again.

For local brands, talk about your heritage

and provenance but root it in the 'now'. Gen Z are interested in the immediate past and present. A brand talking about how it was founded locally in the 19th century won't have great appeal for this generation, because it's not something that they can fully relate to.

Beyond location, find credible interest areas

to engage with your audience. How else do they define themselves? Find that niche and tap into it. By doing this you can demonstrate just how relevant your brand is.

SMALLER TRIBAL IDENTITIES CAUSING WIDER DIVISION
DIVISION CAUSING SMALLER TRIBAL IDENTITIES
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VALUING PERMANENCE



**"WHEN I FEEL SAD,
I GET MY MEMORY
BOX OUT AND GO
THROUGH MY PHOTO
ALBUM. IT ALWAYS
CHEERS ME UP"**

JAMIE-LEIGH, 23 YEARS OLD,
FULL TIME WORKER, SOLIHULL

Our world is a transient place. Spotify, Netflix and Kindle have toppled their physical counterparts, and dating's been reduced to a split second decision over a swipe.

Even social media, somehow, is faster and more temporary, with ephemeral content dominating the way we communicate.

Our Gen Z group is a part of this rush towards impermanence. They'll purge their Instagram account when they get bored of it, or when something changes in their life, like a relationship break-up, or simply to keep control of their privacy. Some of them have as few as four to 10 pictures on their Instagram feed.

"I've definitely gone through my Instagram feed and archived old photos of myself, especially the photos of myself when I was younger and not as attractive."
Carlotta, 20 years old, London

"Right now I only have four photos on my feed, I've deleted so many photos. It's easy for me to do that."
Jamie, 19 years old, part-time work, Birmingham

We tried to understand whether this was because those pictures didn't receive the attention (in the form of likes) they were hoping for, as some research has shown.

But our Gen Zs shook their heads: "It's not that. I just got bored of the me back then. It's not the me now." said Jamie, 19 years old, from Birmingham. The "me back then," that he refers to, was only six months ago.

Today's world is too multifaceted and too fast-paced for it to make sense to Gen Z to have one fixed identity. They have to shift and change. Their identity is hypersensitive to the environment around them. If they feel the context has changed—new friends, a new job, new family circumstances, new influences—they feel they have to change too.



Before we begin to worry life's disappearing down a digital black hole; our group has shown there is still a place for connection to the physical in their world.

"I HAVE A DISPOSABLE CAMERA, TO CAPTURE THOSE SPECIAL MOMENTS"

ZACK, 20 YEARS OLD, MANCHESTER"

They value physical things they can touch, keep and surround themselves with. They have framed photos, concert tickets and diaries: some of them have turned their rooms into 'museums of me'.

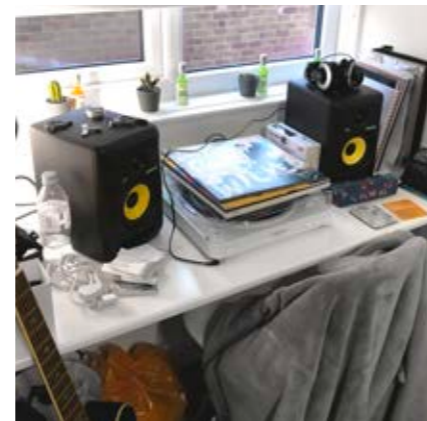


It's not plainly sentimental either. These physical pieces of their past help them to feel grounded in a fast-paced, hyper-connected life. Combined, they create a safe, private space that's always there for them.

"The pictures of my friends and family on the wall... I look at them when I'm in bed at night and I feel as if they are here with me. I feel safe."
Afua, 18 years old, Bristol

A love of the tangible is reflected in their attitudes towards other media. [There's a rise in](#) print sales among Gen Z, and a bit of a [vinyl renaissance](#). As for photography, market research shows 18- to 24-year-olds [are astonished the first time they see a Polaroid in action](#)—the retro camera has lost none of its charm.

Permanence is an idea, a value and a status for them.



PHYSICAL PIECES OF THEIR PAST HELP THEM TO FEEL GROUNDED IN A WORLD THAT'S FAST-PACED AND HYPER-CONNECTED.



IMPLICATION FOR BRANDS

This audience define themselves through a series of core values and beliefs. Tangible manifestations of these values and beliefs anchor them, act as memorable connections, and provide ways to express themselves. Outside of these core beliefs they are much more fluid: able to embrace and abandon cultural moments with relative ease.

The challenge for brands is to balance resonance, at a core level, with tapping into transient cultural moments to maintain relevance. The easy trap to fall into with Gen Z would be to focus solely on the digital, ignoring the physical.

How and where can a physical experience further the relationship between brand and Gen Z?

In-store

Stores aren't just the arena of older generations. They can play a key part in the brand experience for Gen Z. Think of [Supreme's queue culture](#).

Pop-ups and events

Don't have a permanent store near your target audience? What about a pop-up, selling exclusive products?

Merchandise

In the music industry, official [merchandise is an important, permanent representation](#) of the band experience now that

[streaming is the main way we consume music.](#)

It's not just about the physical selling spaces either. How can you downweight digital and upweight the experiential? Can you offer physical mementos of experiences, rather than just a small rectangular screen through which to view them?

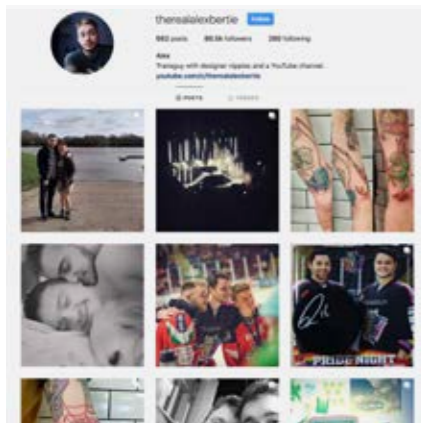
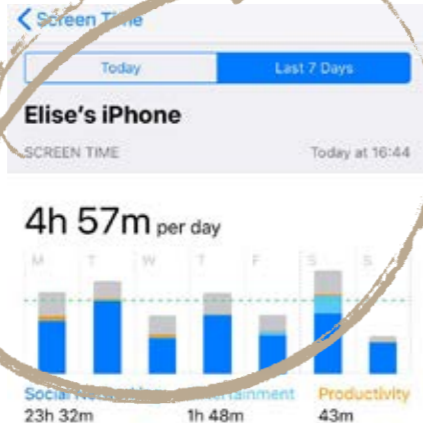
Digital might be a key means for the initial interaction between brand and audience but, to really build the connection between Gen Z and your brand, you need to extend the relationship from the digital to the real world.

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PERMANENCE IS AN IDEA, A VALL
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PERMANENCE IS AN IDEA

5



**INVERSE
INFLUENCE**



Our obsession with influencers appears to be reaching its peak. We build activations, campaigns and [festivals](#) around them. We're even creating virtual ones, to [model clothes on Instagram](#) or [vlog for our entertainment](#).

But, to paraphrase a famous fictional scientist, we were so preoccupied with whether we could, we didn't stop to think if we should.

In fact, influencers with mega popularity are unappealing to the Gen Z we spoke to.

"When influencers get big, I honestly have to stop following them."
Carlotta, 20 years old, London

"I've unfollowed people who I used to follow for years because they got too big on Instagram."
Elise, 21 years old, student, Solihull

Gen Z actively favour and follow people they see as having earned credibility: people with a genuine skill, an established talent, an interesting perspective, or those who are taking direct action.

"I FOLLOW ALEX BERTIE [TRANS ACTIVIST] ON EVERY SOCIAL PLATFORM. I'VE BOUGHT HIS BOOK AND HIS MERCH. HIM AND HIS VIDEOS WERE ONE OF THE THINGS THAT MADE ME REALISE I AM TRANS"
JJ, 18 YEARS OLD, LEEDS

INTERACTING WITH INFLUENCERS, THE GEN Z GROUP TAKE THREE CONSIDERATIONS INTO ACCOUNT: THE SIZE OF THE FOLLOWING, THE STRENGTH OF THE CONNECTION, AND THE EARNED CREDIBILITY THESE PEOPLE HAVE.



Jamie-Lee Mynett
Solihull

GEN Z'S PARENTS APPEAR TO HAVE A MUCH MORE POSITIVE CONNECTION.

The success of the [adidas Tango Squad](#) is an example of the growing importance of micro-influencers, who trade on skill rather than follower size.

The campaign built a community of football enthusiasts with highly engaged local followings. They were given access to unique adidas content to spread to their peers—the target demographic—on dark social.

The focus was on resonance over reach, leveraging the credibility and more intense personal interaction that comes from smaller communities.

It can even be powerful for brands if influencers don't mention what they're wearing. Gen Z are more than ready to scour the internet to find out where their favourite talent's outfit is from, and the result feels less transactional and more genuine.

"I saw the [@slumflower](#) wearing a green sequin dress that I really liked. She didn't tag where it was from so I spent an hour on ASOS (she's always wearing something from ASOS...) scrolling through different leather skirts until I finally found the one that she was wearing."
Afua, 18 years old from Bristol

IRL influence remains important in this group too. It's not just about the interactions Gen Z have online—friends and family still hold sway.

However, nobody confessed to having a leader, or a trendsetter, that they look up to. Friendships are instead formed on how much each person can complement the others' thoughts and ideas.

One friend might know a bit more about music, another a bit more about fashion, but there is no one member of the group whose opinions carry more weight.

When it comes to how their friendship groups influence them, Gen Z talk about many-to-many relationships, as opposed to one-to-many. They have several smaller friendship groups that stay compartmentalised through multiple chats on social media, and don't cross.

These groups are founded either on childhood familiarity or on new passions—like, 19 year old Jamie, who has a K-Pop based friendship group.

An interesting outcome of having multiple social accounts to maintain relationships is that there is a possibility to have more friends. Dunbar's number suggests that [150 is the maximum number](#) for a social circle, but Gen Z exceed that. Social media helps with the heavy mental lifting required to maintain more friends and friendship groups.

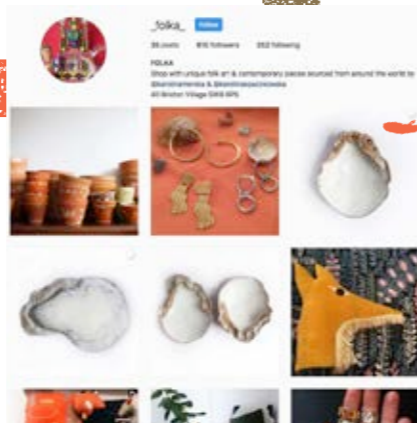
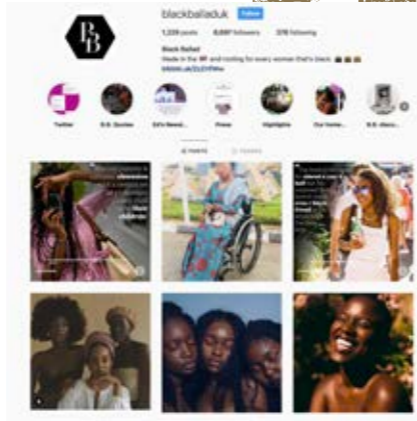
Parents get a shout out too. While Millennial relationships are characterised by [complexity and excessive interest](#), Gen Z parents appear to have a much more positive connection.

"My mum is the kindest, most caring person I know. I want to be like her."
Jamie Leigh, 23 years old, Solihull

"My dad came from a different country not knowing anyone, but he had a passion [photography] and went for it."
Darius, 19 years old, London

"My mum is always my sounding board. I go to her when I need to talk things through."
Elise, 21 years old, Solihull

Parents are confidants, having loosened the reins. There's trust, grounded in shared interests and passions, which inspires Gen Z to follow in their footsteps. As advertisers, we're sometimes guilty of overlooking this.



IMPLICATION FOR BRANDS

Influencers with large followings are actually likely to dissuade rather than attract Gen Z. Thinking of Kylie Jenner? Think again. An individual's reach and scale is making way for the power of collective micro networks. There is no longer a single trend-setter within a category. Rather, Gen Z look to networks of relatable peers.

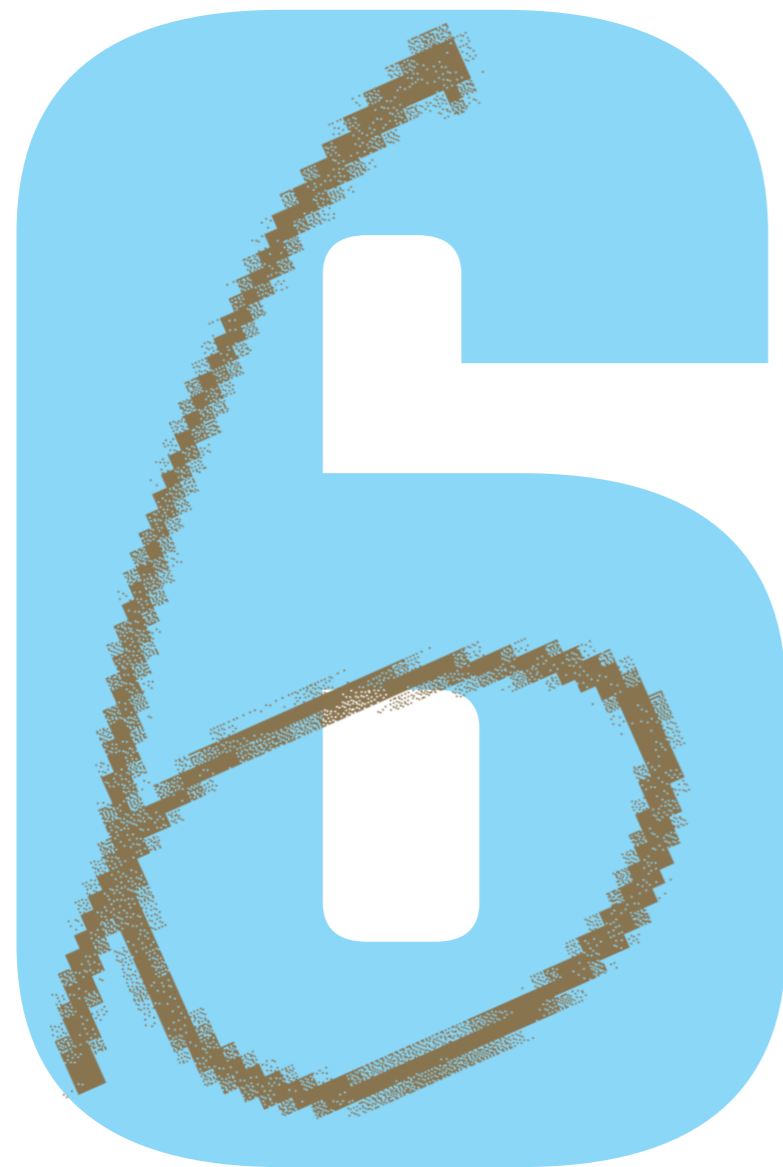
So think smaller.

Micro social followings will have a greater impact if the relationship is authentic. Select people who already have a connection with your brand, don't just buy their following. Work with people who have a talent that compliments your brand. Show how your brand is woven into their world rather than imposing your creative on them. How can you work with micro-influencers as partners and co-creators rather than simply a means of distribution?

Don't just think about online connections.

Two of the key influential groups for this generation are friends and family, aka the real heart of social networks. Instead of going after strangers, how can you engage the actual social connectors within each community?

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HYPER-HYBRIDS

Gen Z is the most **fluid generation**. They don't see themselves in binary terms anymore—they can be many things all at once. This fluidity doesn't just apply to sexual orientation or gender, but also to their wider interests. **The concept of fluidity has been extended beyond the self and into how they see and interact with the wider world.**

The early noughties saw the rise of the slash/slash titles used to describe the many aspects of the Millennial generation.

This was, and still is, linked to how individuals see themselves as multifaceted, not one-dimensional: engineer/artist or graphic designer/mum. Identity is no longer single-minded. **It's become hybridised and Gen Z have taken this concept to heart.**

This idea has moved beyond how individuals self-identify and now plays into a wider expectation of others. The people they find interesting, the talents and skills they seek to acquire and how brands sell to them. As Gen Z has itself embraced hybrid identities, it's made them more receptive to and eager to embrace combined messaging from brands.

The Gen Z we spoke to told us how the hybridisation of trends and interests—mashing up two totally unexpected brands, personalities or cultures—gains their attention and excites them. They love spontaneous collabs between talents with different skills. The result is a freshly generated perspective they can fold into their own layered identity.

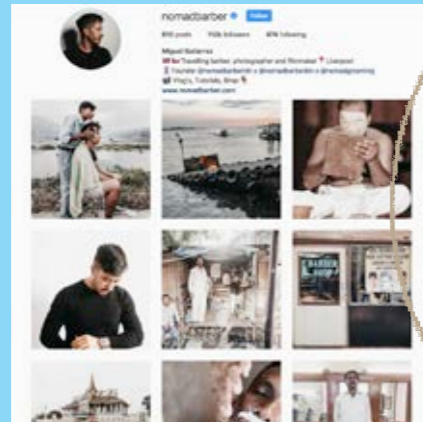
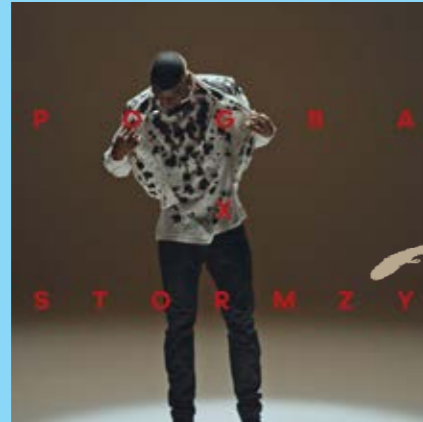
"I love collaborations between musicians and between make up artists. Like the one between James Charles and JeffreeStar, who is also a musician. Or the one between James Charles and The Dolan Twins, who are comedians. I have started following the Dolan Twins too after that collaboration. They are really funny. I enjoy when unexpected people team up. You can always learn something from them."
Jamie, 19 years old, Birmingham

"ACNE STUDIOS' LATEST COLLABORATION WITH FJALLRAVEN WAS UNEXPECTED, BUT TO ME IT MADE SENSE. THEY ARE BOTH SWEDISH BRANDS, BOTH TRUE TO THEIR ETHOS AND DON'T FOLLOW THE HYPE."

ADAM, 20 YEARS OLD, GLASGOW

"I usually look for contemporary artists on Instagram. This is how I found about Harley Weir (photographer). He did some work with Grace Wales Bonner, designer. I like how they work together and the themes they address and bring to life. They both have a great eye, but in different ways..."
Ruby, 21 years old, Glasgow





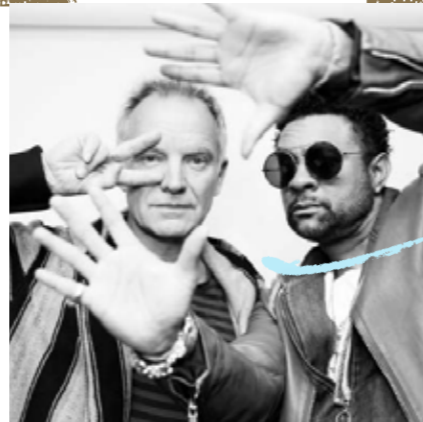
Some successful recent campaigns have taken the collaborations and created cultural moments:

Pogba x Stormzy, taking the best of grime and football and transforming how clubs announce transfers. The activation worked thanks to both Pogba and Stormzy being fans of each other, both were part of the zeitgeist.

Snoop Dogg x Martha Stewart's Potluck Dinner Party and From Crook To Cook: the hip hop legend collaborated with the domestic goddess. Neither were at the pinnacle of their appeal to their respective audiences but the unlikely pairing proved a hit. Snoop had a love of cooking and the pair had a natural chemistry. They were enjoying themselves and having fun. The audience lapped it up.

Nomad Barber - the ultimate 'slashie': traveller/barber/photographer/filmmaker. A talent for barbering and a passion for travelling has allowed Miguel Gutierrez to become an applauded filmmaker and photographer as well as build up a following of more than 112K on Instagram.

Supreme has made its name from unexpected collaborations. Over the years the brand has worked with John Smedley—a Royal Warrant-holding knitwear specialist, Toshio Maeda—godfather of the hentai or 'manga porn' genre and NYC's MTA MetroCard. These partnerships created something new, unexpected and unique—exactly what Gen Z craves.



IMPLICATION FOR BRANDS

We're seeing team-ups between unexpected brands gain traction, and get attention, across everything from music to fashion.

Don't just collaborate for the sake of collaboration - think about the statement you want to make and design the collaboration around that.

Think of the [Alexander Wang/adidas collaboration](#) where the brands turned the adidas logo upside down to challenge the perception of the elevated status of luxury—adding a layer of subversion.

Collaborations need to feel authentic. add value for both brands involved and create something unique—otherwise Gen Z just won't see the benefit.

You have to be careful too. Random, awkward or forced mash-ups can have negative consequences. Remember the Sting and Shaggy album...? We're still trying to forget it.

Think about how you can bring together different talents, even if unexpected, and promote interesting and fresh collaborations.

200%

**OF GEN Z DO NOT CONSIDER
THEMSELVES EXCLUSIVELY HETEROSEXUAL,
AS OPPOSED TO 10% FOR PREVIOUS GENERATIONS**

Source: <https://www.mckinsey.com/industries/consumer-packaged-goods/our-insights/true-gen-generation-z-and-its-implications-for-companies>



RECRUITMENT CRITERIA

When looking for our interviewees, we wanted to be as representative as possible of the whole of the UK. We wanted to draw a realistic portrait of Gen Z and their lives, in a multi-faceted, multi-cultural society.

We also wanted to talk to people passionate about something, to understand the role social media and the internet play in fueling those interests.

We looked for people who:

- Were born between 1995 and 2002
- Come from across the UK not just London
- Live in either cities or suburban areas
- Are from different family/ socio-economic backgrounds
- Are from different ethnicities
- Have some degree of passion around something: whether music, photography, fashion, sports, social activism etc
- Are active social media users.

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