

SELFHD**

Insights at the
speed of culture

DECODING YOUTH IDENTITY IN THE SOCIAL AGE



We create big
brand ideas
that engage
U30s



WE ARE ZAK

We're an agile, independent creative agency with a singular focus:
We create big brand ideas that engage under 30s.

We work with brands that want to stay relevant in this rapidly shifting world of culture, tech, media and consumer attitudes.

WHAT IS SELFHOOD?

It's our global cultural insight network of under 30s. They are smart, ambitious and creative types who are hard-wired into our creative process.

We partner this insight with neuroscience and psychology. These experts help us understand how the youth brain is developing and what that means for how these audiences think and feel.

Last year we successfully launched SELFHOOD with a piece of research debunking the myth of the Millennial. They are a richly nuanced audience and going deeper with our insight has helped us create more original and effective connections for the brands we work with.

This year we are decoding how youth identity is changing in the face of radical social pressures and what this means for brands.

WRITTEN BY DOM WEISS, HEAD OF PLANNING @ ZAK

With 10 years' experience dealing in the currency of culture, Dom understands the power that big, emotional ideas can have on the bottom line of a brand.

In his time working in the music industry at EMI and Warner Music, Dom brought many developing artists to market, redefining the internal culture around marketing and driving the artist strategy with a unique understanding of the audience.

Dom has worked across big brands such as John Lewis, Save the Children and Diageo, as well as artists including Charli XCX, Lily Allen and Dua Lipa.

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SELFHOOD
16-24yos network
members across
seven countries



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EXECUTIVE SUMMARY

This paper is all about 16-24 year olds.

Despite their age, this audience carry significant sway when it comes to the bottom line for brands. Fast Co research [Fast Company, 2018] says Gen Z will account for 40% of consumers by 2020 and

they already influence more than \$4 billion in discretionary spending in the US alone.

There is significant commercial value to this audience and brands that understand

them are poised to make big gains right now, and in the future.

At ZAK we're not a fan of demographics, unless there's a scientific reason to think in this way. In this case, there is.

16-24 is the age you develop your identity. You understand who you are, how you want to come across to others and what those people may think of you. This period of brain development is underpinned by growth in what's

**16-24 IS THE AGE
YOU DEVELOP
YOUR IDENTITY.**

**"THERE IS THIS
SILENT EXISTENTIAL
DREAD ABOUT
WHAT OUR FUTURE
IS GOING TO BE."**



called the 'social brain'. It's a highly sensitive time when memories are heightened and decision making is ruled by your peer group (in a big way).

You need a means to build that identity, and this is where brands come in. They act as conduits, as bricolage signifiers, of who they are and who they want to be. This is their first meaningful meeting with these consumers and it lives long in the memory.

Same as it ever was?

No, not even close.

The idea of teenagers becoming adults is not new news. Identity,

independence and

rebellion are established constructs.

However, the 21st century digital

condition is providing a fundamentally different environment. The human insight still applies but with new platforms, new pressures and new circumstances to navigate.

Most notable of those is that they are growing up native to social media.

Native to constant feeds from friends, to access to an unencumbered world of celebrity and to the most sophisticated personal branding tools.

**SAME AS IT EVER
WAS? NO, NOT
EVEN CLOSE.**

What an exciting time to be alive, but also, how terrifying! This volume of social relationships is unprecedented. It's no wonder reports of anxiety are so commonplace.

Neuroscience tells us that adolescents act differently in the presence of peers. They act out of character, they are irrational and they take more risks. This presence is no longer something you drift in and out of. It's ALWAYS there. Commenting, liking, viewing, reading, sharing. Someone is always watching. Their hyper-sensitivity to peers is colliding with the mass social connectedness of our world. They are creating their identity in an environment unlike any we've seen before.

In this paper we explore those changes and what they mean for brands.



HOW WE DID IT

STAGE 1

THE NEUROSCIENCE

In-depth expert interviews with cognitive neuroscientists to understand what's happening in the human brain at this formative time.

This included sessions with the members of Sarah-Jane Blakemore's University College London research lab. Blakemore is the leading global expert in the teenage brain.

These experts were present throughout this project, giving vital neuroscientific context to our thinking.

STAGE 2

ETHNOGRAPHIC RESEARCH

We knew how their brains work, now it was time to find out what they think, feel and do.

We recruited smart and savvy 16-24 year olds from 7 different countries using our SELFHOOD network.

These are young people on the precipice of adulthood. How they view the world around them, and how they view themselves will never be the same again.

There were no focus groups, no two-way mirrors, no sterile research facilities.

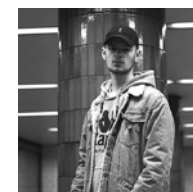
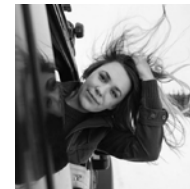
This research was about going native. We sought to speak to these audiences on their terms, in their homes and on their phones.

This was a mix of self-reported digital ethnography and in-depth personal interviews using their favoured communication devices.

STAGE 3

QUANTITATIVE

We spoke to 1,000 16-24 year olds in the UK to validate our findings.



THE NEURO- SCIENCE BEHIND IDENTITY

EVOLUTION OF THE BRAIN

Our brains have specifically evolved to make us better at building and maintaining relationships.

Over time - a long time - the prefrontal cortex has physically expanded. This need to socialise is baked into our evolution.

Dunbar talks about the "quantitative relationship between brain size and social group size" [Dunbar, 1998]. He suggests that our social network size is

constrained by our cognitive ability to build, maintain and navigate stable relationships.

THE NEED TO SOCIALISE IS BAKED INTO OUR EVOLUTION.

With those constraints in mind, it's thought that our brains are able to maintain around 150 connections. That's 'Dunbar's Number'.

So, what would happen if those constraints were no longer there? What if we could augment the brain with some kind of auxiliary processing power?

THE SOCIAL BRAIN IN A SOCIAL WORLD

During adolescence our 'social brain' goes through an intense period of development. This process allows us to better understand the mental states of others. A skill known as mentalising.

As Sarah-Jane Blakemore, the foremost expert in this field, eloquently explains "this helps us recognise others and evaluate their mental states

(intentions, desires and beliefs), feelings, enduring dispositions and actions”

[Foulkes & Blakemore, 2018].


The context of that brain development has been radically altered. As we have become increasingly connected through technology, our exposure to significant social connections way exceeds Dunbar’s 150.

The way our brains cope with this cognitive load is to lean on that technology to ease the demands on the processing power.

The challenge for teens and young adults is that they are in the early stages of the development of their social skills.

As Dunbar says himself:

“What is most important in the development of a large neocortex in primates is not the embryological development of brain tissue per se, which is associated mainly with gestation length, but rather the ‘software programming’ that occurs during the period of social learning between weaning and adulthood”
[Dunbar, 1998].



**“I'M NOT SAYING
PEOPLE MUST
NOT BE FAKE BUT
I'M SAYING JUST
BE HONEST WITH
YOURSELF.”**

At a critical point in the development of the social brain we are placing an enormous cognitive load on these teens as they are immersed in a vast and cavernous world of social networks.

MEMORIES THAT DEFINE YOUR LIFE

Memories formed during this sensitive period of adolescence are proven to be more vivid and last longer. The events experienced at this time of life stay with you.

This is called the 'reminiscence bump' [Rubin, Wetzler and Nebes, 1986]. According to psychologist Dan McAdams, experience is cemented into long-term memory like no other time of life.

Marketing to audiences during this life-stage can create brand equity with serious staying power. Conversely, there is also the danger that brands create negative impressions that last equally as long.

This is a potent time and brands need to

be careful and thoughtful with how they approach it.

FORMING IDENTITY

The defining feature of this period is the formation of identity.

We begin to understand the identity of others and we begin to develop a sense of how other people see us. Big changes.

Blakemore says "it is during adolescence that our sense of self becomes particularly important to us. We imagine

how we appear to other people and how they will judge us, and this sense of self – sometimes called the 'looking-glass self' – might induce feelings of contentment, embarrassment, pride, shame or guilt" [The Times, 2018].

As this feeling of self-identity takes

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hold, these adolescents become increasingly aware of how they come across, of what people think about them. This triggers a move to take control of that identity and how it's signalled out. The personal brand begins.

This is a milestone moment for real brands too, it's the point where these teens emerge as paying consumers. More than that, they begin to interrogate brands with a new lens and a new value exchange begins to emerge.

They start to question, 'what does this brand say about me?'

Brands become ideas, ideas that help these young people construct their identity. Put in this context, there is a critical value exchange occurring.

Brands are supplying the building blocks of identity.

ALWAYS ON PEER PRESSURE

By learning more about the forces that shape the identity of teenagers and young adults, we can better understand how brands can play a positive role.

Peer pressure is the pressure they feel the most. Blakemore remarks that “their decisions are driven by the fear of exclusion by their friends” [The Times, 2018]. As the concept of self-identity grows, so too does the feeling of being self-conscious.

This hyper-sensitivity to social exclusions gives these teens a much higher propensity to make decisions that seem irrational. A study by Laurence Steinberg [Steinberg, 2017] at Temple University in Pennsylvania found that when in the presence of friends, adolescents took nearly three times as many risks, and young adults nearly twice as many. The presence of peers had no impact for adults.

**TEEN BEHAVIOURS
ARE RADICALLY
ALTERED WHEN
THEIR MATES ARE IN
EARSHOT.**

The message is clear, teen behaviours are radically altered when their mates are in earshot. This behaviour continues well into our twenties.

This is significant for this generation because they are ALWAYS in the presence of peers. Smart phones are near ubiquitous and research tells us that 45% of US teens are checking their social media ‘almost constantly’ [Pew Research, 2018].



A NEW ENVIRONMENT BREEDS NEW BEHAVIOURS


This always on social connectivity presents a unique backdrop for today's teens to emerge as young adults.

Peer presence is now an ever-present, their identities are under perpetual evaluation.

We are living through the first epoch of people growing up native to social media and the results are not yet well known. There is no longitudinal study, no conclusive evidence.

Over the coming pages we aim to shed some light on how today's cultural landscape and technological advances to social connectivity are shaping a shift in the identity of young people.

By understanding this important context, we will be better placed to create brands and communications that meet and exceed the expectations of the newest entrants to the world of consumption.



**"I COMPARE MYSELF A LOT TO
OTHER PEOPLE, WHICH IS VERY
EASY TO DO BUT INCREDIBLY
DETRIMENTAL. I THINK IT'S
SOMETHING THAT THIS ENTIRE
GENERATION DOES, WHETHER
THEY LIKE TO ADMIT IT OR NOT."**

BURNING DOWN THE HOUSE

They fundamentally disagree with the ideologies of their elders. They are not for labels, or borders, or binary choices. These differences go beyond the remedy of healthy debate; this audience are diametrical opposites. There is no compromise, no work-around. They will not countenance living by the rules of generations past.

This refusal to compromise starts from a place of injustice. More than that, they are angry. They look around and see a world that's not made for them, one that stamps on their freedom of self-expression. They ask where are the spaces for me? Where can I be me without

apology and without judgement?

Older generations have lived through economic prosperity bordering on abandon. Without trying particularly hard, they have accrued wealth and security that is now unreachable for today's youth. The house, the car, the disposable income. These were yesterday's markers of success, today they are distant gestures of another time.

With social media the world is transparent, but the riches on display are far from reach. They see all that they want, but the routes to that

reward are barely defined. They see a literal glass ceiling above their heads. This has created a feeling of being disenfranchised from society, of being left out.

Rebellion is not new news. Mods and Punks created mass cultural shifts around the idea of rebellion and more recently the #MeToo movement and various political rallies have shown how the will of the people can be mobilised to great effect.

The difference is, Gen Z have been liberated by technology. For Punks, they had to 'grow up and get a job' at some point. For this audience, their uprising is not fleeting, it's organised and scaled. They are intent on deconstructing the world and creating a new future for themselves and the generations below.

Facebook is already feeling it. The latest Pew research [Pew Research, 2018] says 44% of young people in the US claim

**"YOUTH RIGHT NOW
ARE REALLY CREATIVE
WITH TECHNOLOGY.
WE ARE USING IT TO
GAIN CONTROL."**

to have deleted the app in the last year. In part, the social network is just too big and hanging out with Mum and Dad is never going to be cool. But if Facebook could fall, then who else?

**"MY GENERATION HAS
BEEN SWEEPED UNDER THE
RUG. THIS MAKES ME
FEEL FRUSTRATED AND
IT MAKES ME ANGRY."**

Their solution is to segregate themselves online. They are creating closed, often esoteric communities exclusively

for like-minded people. Twitch, Depop, Whatsapp, Snapchat all do this. They are places built and inhabited by particular groups of people, united by a specific passion or attitude. This creates a strong bond, a sense of belonging. It removes conflict. It removes 'everyone else'.

By peeling away to more targeted dark social they are able to be themselves without fear of reproach. This phenomenon is happening IRL too. They are not obsessed with mass friendship



groups. Their preference is for small tight-knit silos of people they know and trust, people with shared passions and world views.

They are slowly extracting themselves from the world as we know it. Creating new social networks. Not mass identity parades, but communities with a focus on passion and doing what you love.

There is little tying this generation to their elders. They are actively pushing off, setting sail on a new world. This is a clean break, nothing left behind.

The house is burning, the ashes are the future.

**“I SURROUND
MYSELF WITH PEOPLE
THAT UNDERSTAND
ME. WHY WOULD I
WASTE MY TIME ON
THOSE THAT DON'T?”**

**40% DON'T FEEL
REPRESENTED BY THE
IMAGES AND IDEAS
IN ADVERTISING.**



WHAT DOES BURNING DOWN THE HOUSE MEAN FOR BRANDS?

1 GO BESPOKE

INSIGHT

Don't treat me like everyone else.

WHAT BRANDS CAN DO

Work out what their specific needs are from the category and build a product or service to meet those needs.

WHAT BRANDS ARE DOING

Monzo, giffgaff and Vodafone are all enjoying success with building products and services bespoke to this audience.

2 GROW PASSION-LED COMMUNITIES

INSIGHT

I'm in search of people who think, feel and love the same as me.

WHAT BRANDS CAN DO

Brands can create these communities. Align your brand with the passions of your audience and build a space - IRL or online - to bring those people together.

WHAT BRANDS ARE DOING

Think pop-up communities in the Supreme queue, or adidas' Tango squad or how Depop is uniting lovers of luxury fashion (minus the luxury prices).

3 USE YOUR POWER

INSIGHT

If you're not with us, you're against us.

WHAT BRANDS CAN DO

Digital tools have democratised this audience, but they still need help. Brands can add genuine value to this audience by supercharging their ambitions to change the world.

WHAT BRANDS ARE DOING

WeWork is revolutionising the workspace, Patagonia is championing a world-view on sustainability and the fight against plastics is being taken up by everyone from Starbucks to adidas.

ROAD TO NOWHERE

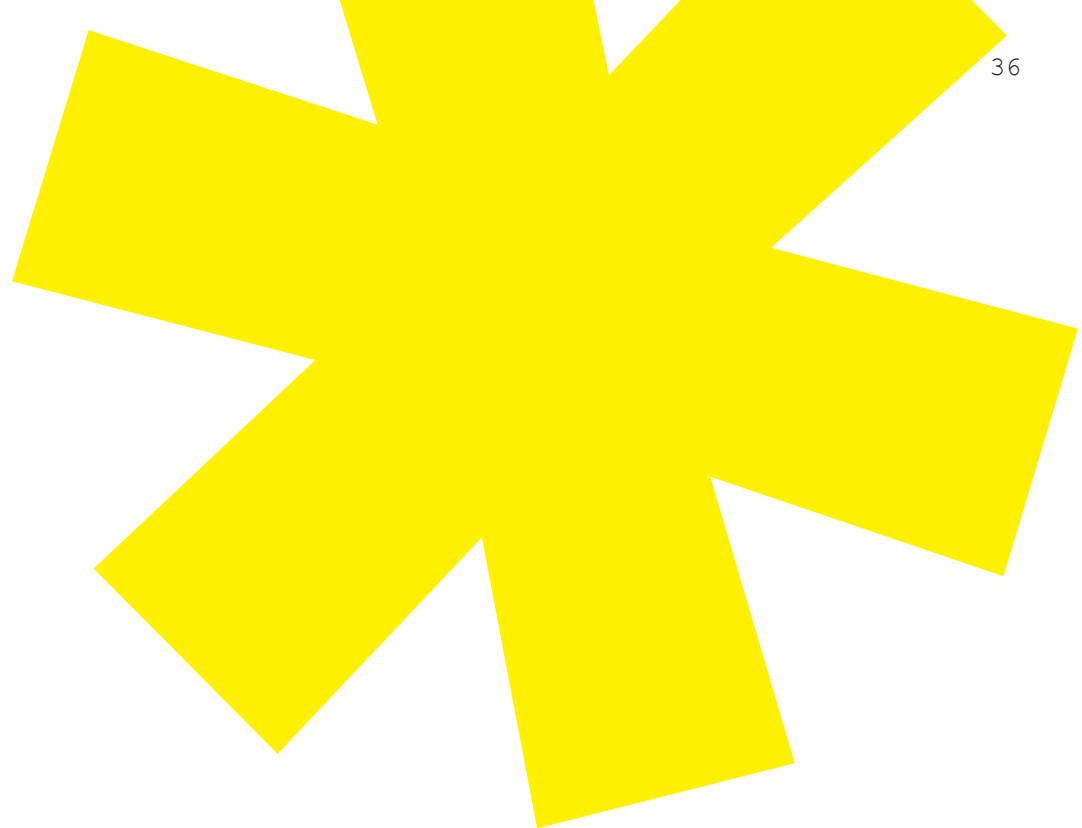
This audience are imbued with a desire to make their mark on the world. In part, this is the kind of idealism you would expect from a young person embarking on adulthood. But this does

not capture the whole story.

**43% SAY SOCIAL
MEDIA MAKES
THEM WANT WHAT
THEY CAN'T HAVE.**

Nike awarding Ronaldo a lifetime deal worth a reported \$1bn. It doesn't end with these idols.

Each waking minute they are exposed to unimaginable images of success. The Carters taking over The Louvre. Kylie Jenner valued at \$1bn.



Success has become seemingly ubiquitous. A quick look on Instagram or YouTube and they'll see their 'friends' travelling to exotic locations, wearing unaffordable brands or hanging with the coolest people (those with the most likes/followers/etc anyway).

Social media has created a kind of rose-tinted transparency. The lives of everyone attention-worthy are broadcast in full technicolour. This exposes these successes, these riches. Only a short time ago this access simply wasn't available. We were blissfully unaware. Now we've seen it, we want it.



To magnify this tension, the ideas beamed through these channels tend to be heavily edited. Embellished for maximum effect. Young audiences know this, it's not new news, but it doesn't make it any easier to ignore. The relentless frequency means that interrogating each and every post for authenticity would be an impossible task. The human brain just doesn't have the cognitive availability to do so. Remember that 95% of our decisions are made instinctively using mental shortcuts [Zaltman, How Customers Think, 2018]. Even when they are aware

of the machine, judging what's real is harder than you might think.

Inevitably, this deluge invites comparison. These audiences question their ability to live up to these distorted ideals. They question their own self-worth, they question their own ability. Reconciling that can be difficult because all they see is the end product.

The finished article gives no clue to the journey. It doesn't tell you how they got there. They are looking for inspiration, yes, but it has to be tangible and something they can action.

**"I FEEL THE
PRESSURE OF NOT
BEING GOOD
ENOUGH."**

This means who they aspire to is in flux. They know that if they are to succeed in life, they can't replicate Kendrick, or Elon, or Gigi. Times have changed, already. How you win today, is not necessarily what will work tomorrow. They have to find their own way.

People from their cohort, or just above are their heroes now. They look up to people making it in their world, making it under their rules. It's where aspiration collides spectacularly with attainability. All this makes the Michael Jordan superstar era we know now feel suddenly archaic.

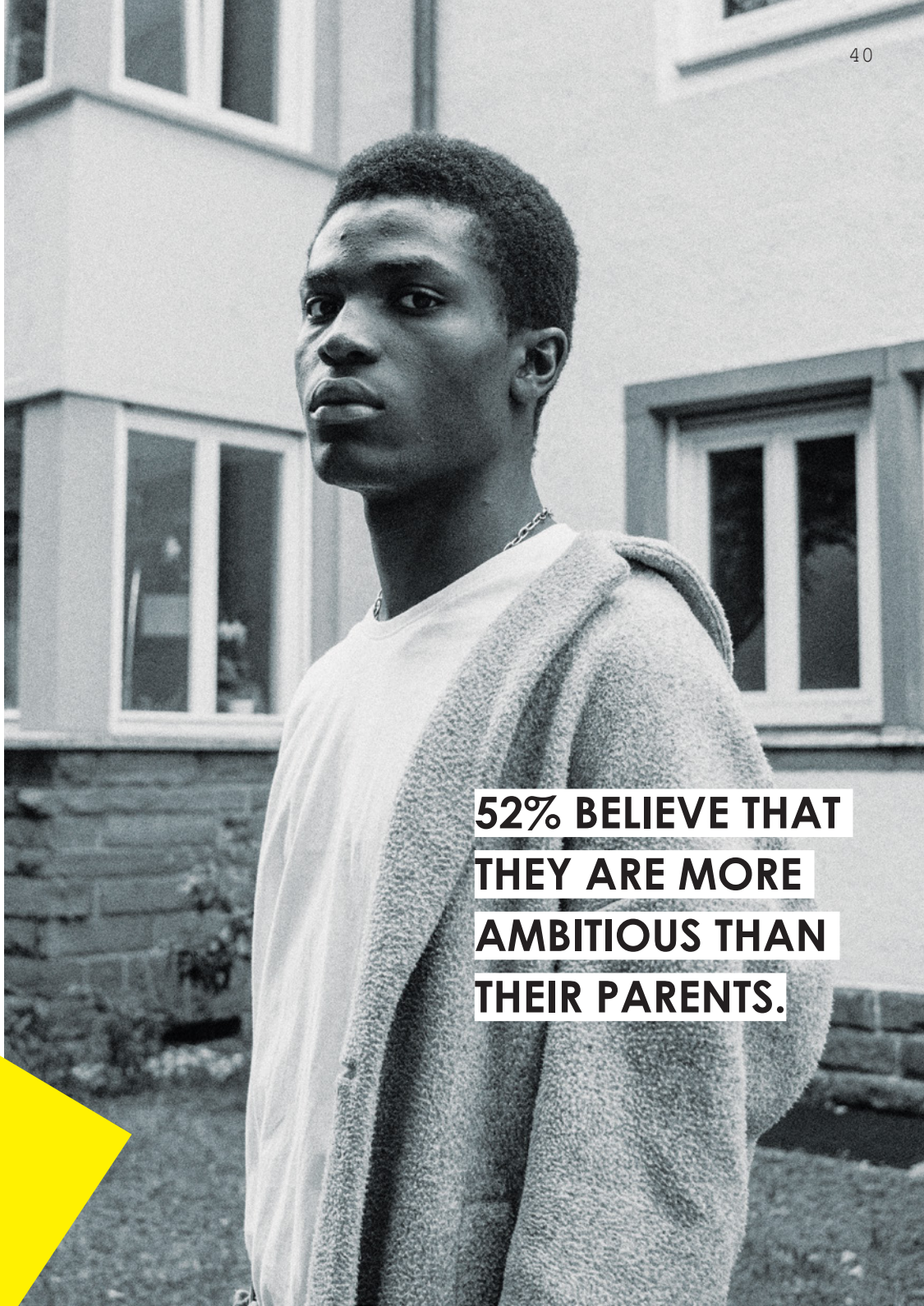
**30% OF 16-24S
WOULD GIVE UP
SEX FOR A YEAR
JUST TO 'MAKE IT'.**

To connect with these younger audiences, to really add value to them, brands need to rethink what aspiration is. Now, of course there is still a role for the global superstar. Ronaldo, Hadid, Swift, et al. They are mass cultural icons at the top of their game, but they are also inimitable. They cannot be copied, they cannot be replicated.

There is an opportunity for brands to

give more back to these young audiences.
More for them to take, to make their
own. If they do this, brands can
genuinely add value.

Instead of parroting the past, what if a
brand were to write the future?



**52% BELIEVE THAT
THEY ARE MORE
AMBITIOUS THAN
THEIR PARENTS.**

WHAT DOES ROAD TO NOWHERE MEAN FOR BRANDS?

1 SHOW YOUR WORKINGS

INSIGHT

It's not where you get to, it's how you get there.

WHAT BRANDS CAN DO

It's all about the journey. Break it down, show them the path to success. The graft, the breaks, the knock-backs. They can see the polished success stories anytime, let's keep it real.

WHAT BRANDS ARE DOING

Nike's 'Just Do It' ad for Serena Williams shows that even Grand Slam champions have to graft from an early age.

2 KEEP IT RELEVANT

INSIGHT

How my idols made it is not how I will make it.

WHAT BRANDS CAN DO

Instead of building influence from the top down, build it from the ground up. Concentrate on the talent of tomorrow. Spot them, back them, give them the platform to perform.

WHAT BRANDS ARE DOING

adidas are creating a new gen of superstars with Tango Squad. Converse offer free studio recording time with Rubber Tracks.

3 DIG DEEPER

INSIGHT

There's more to success than what you see on Instagram.

WHAT BRANDS CAN DO

Dig deeper into the emotional nuance of these audiences. How they communicate is being simplified down on social channels and that doesn't show the whole story. Brands need to dig deeper.

WHAT ARE BRANDS DOING

Dove 'I'm Fine' campaign taps into the idea that what we say isn't necessarily how we feel.

DEFINED BY DOPAMINE

To belong to a tribe? Or to be individual? This is a tension felt heavily amongst this young audience. They are seeking the approval of those around them, but they are also trying desperately hard to be authentically themselves.

**24% FEEL THAT
THEY CAN'T BE
THEMSELVES
ON SOCIAL
MEDIA.**

It's important to remember they are not consumer drones. They are real people. Conflicted. Irrational. Human. As a marketing community, we need to be open to our audiences holding these different points of view. Here we see the pressure to be yourself grappling with a more innate desire to belong. The reality is they want both.

In our research these audiences spoke in depth about the idea of self-realisation, of living by your passions. This was seen as the ultimate form of authenticity, the point where you are truly being yourself. They don't see any distinction between work and home life, they want to be the same person 24/7.

**"YOU'RE NOT
'YOU', YOU'RE A
SLAVE TO SOCIAL
MEDIA. YOU'VE PUT
YOUR WHOLE LIFE
ON THERE. I PUT UP
WHAT I NEED TO
PUT UP. IT IS ME.
BUT IT'S NOT ME."**

This individualism is tempered with the idea of belonging. These young people are no longer singular in their tribalism. They do not subscribe to any one thing, instead they are open to a plethora of different influences. They assemble their unique identity using these influences as inspiration. This allows them both to belong and to be individual.

The challenge now is they feel accountable to a much broader sample of cultural rules and norms. They don't just have to worry about being a goth. They are a goth and a punk and a neo-liberal and an activist ALL AT THE SAME TIME.

This is hard to navigate, hard to be true to. Especially in a world where each move you make online has the potential to be called out and trolled. As a result, they begin to lose the agency of assembling that identity and they become more reactionary to the feedback around them.

As they look to build their identity, they look for feedback from others. Social media tends to be the main mediator of that feedback. It provides a constant stream of analytics that tells



these young people what works about their identity. And, brutally, what doesn't.

**41% SAY
THEY FEEL
JUDGED
ON SOCIAL
MEDIA.**

The metric of reward here becomes recognition from those around you, and those that follow you. Likes, shares, follows, a void of response. These micro-dopamine rushes all play their part in gently shaping how these young people portray themselves online.

They are operating in a kind of identity BETA, iterating their way through life in a quest for digital

dopamine hits. By their own admission, this is creating a gulf between who they are, and who they portray themselves to be. This knowingly work-in-progress approach to identity means they are fluid. Constantly changing, constantly moving.

**29% SAY
THEIR
IDENTITY
IS FLUID.**

The questions for brands is... how do we liberate this audience from these dopamine hits?

WHAT DOES DEFINED BY DOPAMINE MEAN FOR BRANDS?

1 FLUID PEOPLE, FLUID BRANDS

INSIGHT

My identity is always changing.

WHAT BRANDS CAN DO

Maybe brands shouldn't be singular and single minded? What if we create a brand that morphed and changed too? What if the audience projected their values onto the brand?

WHAT ARE BRANDS DOING

Dr. Martens' 'Stand For Something' allows audiences to project their points of view onto the brand.

2 TRUTH SPEAKERS

INSIGHT

It's hard to know what's real and what's not on social media.

WHAT BRANDS CAN DO

Cut through the BS, don't perpetuate

it. Instead of following trends and capitulating to a dopamine induced sense of belonging, show these audiences there is another way. Get to the heart of difficult issues, refresh with honesty.

WHAT BRANDS ARE DOING

Not strictly a brand, but Celeb Face is poking fun at the pressures of social media. Meme culture is how young people tell the truth.

3 DON'T JUDGE ME

INSIGHT

I feel judged on social media.

WHAT BRANDS CAN DO

Give back to audiences, speak on their level, broadcast their posts, give validation. Social media is about conversation, let's get involved in a meaningful way.

WHAT BRANDS ARE DOING

Boohoo's #doyourthing. They show real women, of all shapes and sizes. They have embraced meme culture to speak truthfully to their audience. They laugh at themselves and encourage their fans to do the same. They've created a community where it's cool AF to be you.



SELFHD**

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