

SELFH*D**

Insights at the
speed of culture

THE NEW RULES OF SOCIAL

ZAK

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.

Our previous research has looked at Debunking the Myth of the Millennial and Decoding Youth Identity in the Social Age. This year, we're looking at the New Rules of Social and importantly, what they mean for brands.



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It is said that when the internet arrived as a serious commercial opportunity for brands in the early years of the 21st Century, that nothing would ever be the same. That this was ground zero for the way that they would advertise, and the ability to converse on a singular basis with a customer would wipe away all wisdom before it.

But as an industry, marketing seems not to be great at learning from history.

**"MARKETING SEEMS
NOT TO BE GREAT
AT LEARNING
FROM HISTORY"**

The past is littered with examples of innovations which would promise to render the past obsolete, which have rarely come to pass and before long, plateau themselves.

In this paper we'll look at social media as it has entered maturity and with the benefit of both hindsight and with an objective look at how it is evolving to suit a generation who are no longer content to simply be part of a crowd - either in the real world or the social media world.



**"A GENERATION
WHO ARE NO
LONGER CONTENT
TO SIMPLY BE PART
OF A CROWD"**



THE STATE OF SOCIAL

THE 'NICHE MAINSTREAM

Despite several new mainstream entrants in the days since the early years of social media, when you look more closely, the landscape they inhabited looked oddly similar. If not in how it performed in our lives, then certainly in its scale.

Dominated by big beasts with wide nets who caught all audiences; at the heart of the emergence of social media

was a fundamental misunderstanding of how it needed to perform to meet its promise. In short, ultimately failing to know what human beings seek from the closeness of a group. To be part of a crowd, but retain a sense of uniqueness.

"TO BE PART OF A CROWD, BUT RETAIN A SENSE OF UNIQUENESS"

Since those early days, when social media was often used as an ill-fitting mix of broadcast advertising meets

sales promotion, brands had bought big into the idea that social media can deliver, whatever you seek to achieve by whichever audience.



**"NICHE COMMUNITIES
ARE THE NEW
MAINSTREAM"**



However, as trust issues eroded the perceived worth of Facebook and other platforms, just as they got to grips with the established landscape, they may find that the sands are again shifting.

Our research revealed that young people are seeking smaller social communities on the web. Nearly 60% of the 1,000 under 30s we surveyed agree that smaller communities make them feel like they are surrounded by people who care about the same things as them.

However, it isn't just spending time with those of a like mind, although that is important as 56% of respondents agree with that statement. Over half also agree that there is a fundamental sense of safety in a community which allows young people, and their sometimes complex online alter egos, to be who they are.



In our New Rules of Social series, we will present a reality that has led to a natural proliferation of platforms, to the big beasts losing their lustre in 2019; and where niche communities are the new mainstream, hiding in plain sight. In this, the first of three editions, we will illustrate this point by taking a look at gaming, a community that is often ignored by brands.

CULTURE EATS BIG PLATFORMS FOR BREAKFAST

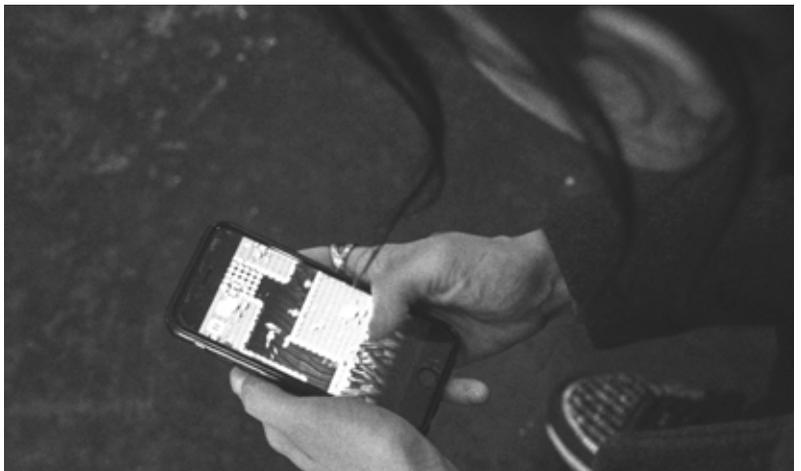
Paraphrasing the famous Peter Drucker quote above helps to illustrate the point that initial promises of zero wastage, real-time optimisation, inch-perfect targeting and a drive towards efficiencies that threatened to render the idea of big broadcast media a relic; now seem flimsy in the face of understanding culture and its persuasive force. Culture never goes away, but all marketing platforms always mature or plateau. Social media is no different.

Initially we were told that social media would solve all our ills, and for a while it must have looked that way to some.

Certainly, the growth of specialist agencies in the space suggested that this was a channel which deserved attention.

But in 2018 when a brand is able to combine social purpose and creative output on a platform which enables quick affirmation like Nike did with Colin Kaepernick, then results (A 31% spike in sales for Nike) follow. Increasingly the active ingredients of a successful social media community are not scale and targeting, but depth, authenticity and gravitational pull for the right type of community member.

**"WE WERE
TOLD THAT
SOCIAL MEDIA
WOULD SOLVE
ALL OUR ILLS"**



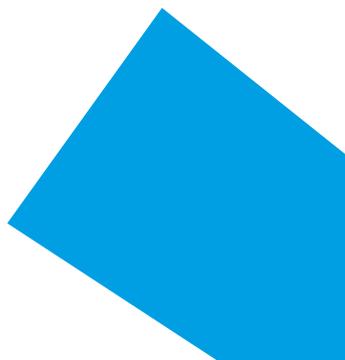
It is however notable that Nike - a brand which largely succeeded historically on building culture through broadcast media - should be one of the ones to understand how to use social platforms for greatest impact 20 years on. Largely because they understand how to communicate within the subcultures which surround their brand, whether sport, music, fashion or in the case of

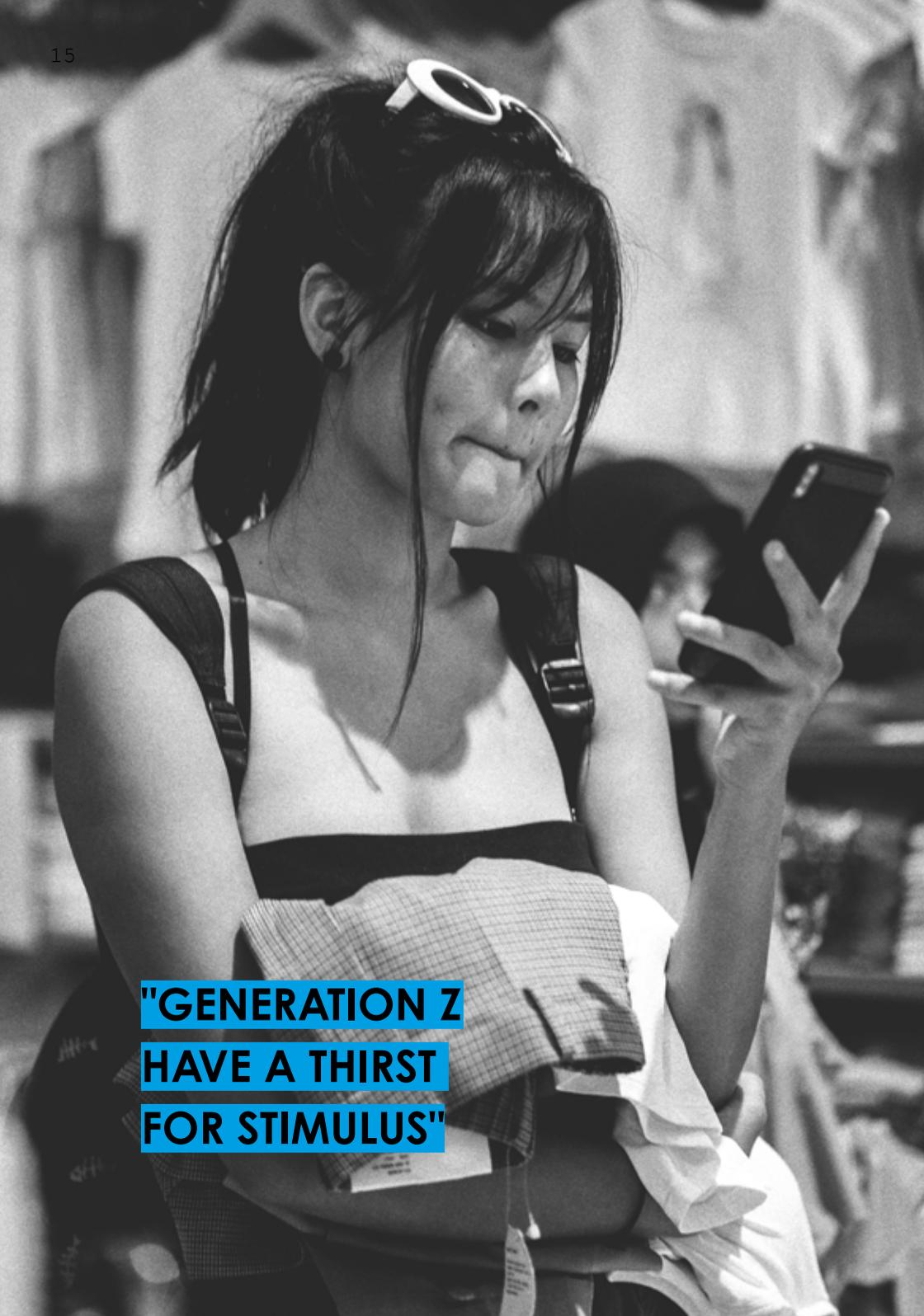
"UNDERSTAND HOW TO COMMUNICATE WITHIN SUBCULTURES"

Colin Kaepernick, civil rights.

There is a sense that the momentum in social media is shifting towards places, communities and people who 'get' certain cultures and apparent outliers. In this paper, we will look at how cultures grow beyond the limits of brands' expectations, and flourish in these channels.

Nike simply managed to do it at scale, but on a lower level there are thousands thriving in what seem like niche cultures, with numbers which suggest that they are anything but. Brands are bypassing these cultures in their haste to navigate social media as they always have done. Through scale and reach, not depth.





**"GENERATION Z
HAVE A THIRST
FOR STIMULUS"**

SOCIAL MEDIA NOW REFLECTS THE PRAGMATISM OF UNDER 30S.

Social Media 1.0 demanded scale and everyone being in the same broad sphere. To Millennials who have grown up during the advent of Facebook, their pursuit of 'friendship' updates and sharing statuses will have appeared novel and new. But to subsequent generations who were often born in the years around Facebook's launch, they have a far more pragmatic and nuanced view of how to traverse social media, which fits into the lives they have today.

The generation now called Generation Z have a thirst for stimulus, and initially gravitated to gaming, downloads, streaming and entertainment online, which in turn meant that they sought social spaces on non-traditional platforms like HBO where they can follow Game of Thrones etc, and then onto further niche platforms. But where are they drawn to?



If the mainstream is cluttered up with your mum and auntie, then Discord, a digital distribution platform for video gaming communities, is likely to be what Facebook wishes it still was for Gen Z.

You can forget boring untargeted posts when you join Discord. It's a social platform where gamers offer their communities targeted chat segmented by topics. This is where real friendships are forged and random pictures of christenings, funerals or your long-lost baby pics are avoided.

"YOU CAN FORGET BORING UNTARGETED POSTS WHEN YOU JOIN DISCORD"

But to appreciate just how pragmatically they use social media, we have to look at the world in which they grew up. 38% of under 30s, now use Facebook as simply a messenger service. This group uses social media merely to communicate and not dwell (63%), which has made it utilitarian, and not something which necessarily commands their passions or interests as with prior generations.



Their world is vastly different from even one generation ago, and this reflects a community of micro-entrepreneurs and passion led communities.

Gen Z have looked on from afar as they have seen the generation before struggle to make an impact in a job market with few opportunities.

As a result, 67% of them state that they do not wish to work for anyone else. They want to be business owners on their own terms, and look to social platforms to assist that entrepreneurial goal.

Equally, the notion of work-life balance is somewhat abstract to them. They need to be fully engaged and driven in whatever they do, be it their own sense of development or their leisure time. To these ends, work and life begin to merge, but not in the way of the Gen X workaholic. To them work is often an extension of their personal passions.

**"THE NOTION OF
WORK-LIFE BALANCE
IS SOMEWHAT
ABSTRACT"**



From those social realities ecommerce social platforms like Depop arose, where they can trade and sell clothes without having to resort to the giant corporate of the Millennial age - eBay, which offered a far more contained and self-policing community and a more homegrown feel.

Similarly, South London's Wavey Garms - initially a small stall in a Peckham arcade, grew via a Facebook group to become an exhibition curator and

filmmaker, resulting in the brand having the gravitational pull of culture that major social networks could have. Their success proves that the mainstream platforms do still have a purpose, which we'll expand upon later.

To continue in the theme of streetwear, a few years ago jewellery designer Tuesday Bassen had her designs blatantly ripped off by Zara, with a rather curt response to her from the retail giant that her work was not of sufficient scale to be considered intellectual property. Almost at the same time, Kanye endorsed the open copying of his Pablo t-shirts by L.A. bootleggers.



Kanye could scarcely complain. He'd ripped off the designs worn by L.A.'s Chicano street gangs in the first place, but it did raise the question of when bootlegging is permissible. The answer may be in Sports Banger, who Dazed recently called "The UK's bootleg king".

Sports Banger's wry take on mainstream staples rose from a niche profile on a mainstream platform - Instagram - and before long he had been invited to collaborate with Slazenger, one of the brands he was supposedly ripping off.

Despite Jonny Banger's professed admiration for the heritage of the brand, there is no doubt that Slazenger had lost its cultural mojo. Instead of scrabbling around in the mainstream marketing weeds, it made alliances with a community of like minds.





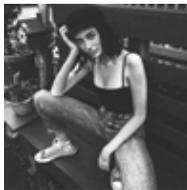
DEPTH OF BELONGING BEATS NUMBERS OF 'FRIENDS'



So, what do those born after 1990 seek from social media?

Turns out, much the same as they seek from their 'real life' connections.

In his book 'The Different Drum', U.S. Psychiatrist M. Scott Peck related four stages of true community building, which we can see a certain familiarity in social media usage from mainstream to niche...





1

PSEUDO-COMMUNITY

- Where well-intentioned people try to demonstrate their ability to be friendly and sociable without depth. A congress of people connected by friendship or vague familiarity.
- The early days of Facebook.

2

A COMMUNITY OF CHAOS

- The first step towards real community. Once a facade of bonhomie is shed, negative emotions flood through: members start to vent their mutual frustrations, annoyances, and differences become clear.
- All online echo chambers from Twitter to (bizarrely) Mumsnet – the latter where a supposed community of mutual support becomes a virtue-signalling noise chamber.



3

AN EMPTY COMMUNITY

- The hardest stage, where one feels isolated from the community they once felt part of, but where working through the negativity results in the finding of truly kindred spirits.
- A period of self-imposed withdrawal and the use of social media as utilitarian, and for the necessity of communication.

4

TRUE COMMUNITY

- A place of empathy with one another. A heightened level of tacit understanding.
- People are able to relate to each other's feelings. Heated discussions rarely turn sour.
- A deeper and more sustainable level of congress, which does not have to be forced.
- Especially when conflicts arise, it is understood that they are part of positive change.

We can quite clearly relate stages 2 and 3 to the point in one's experience of social media when someone may be trolled or victimised. The reasons why one may feel ostracised by a mainstream community are manifold, but where do those who are pushed or perhaps gravitate to the margins find themselves?

**"THEY MAY BE
OUTLIERS,
BUT THEY ARE
NOT ALONE"**



SUBCULTURES ARE BECOMING THE NEW MASSES

Debunking the myth of the gamer.

The Entertainment Retailers Association stated in January that gaming now accounts for more than half of the total UK entertainment market, and has doubled in value to £3.86bn from 2007. The industry as a whole, supports over 47,000 full time jobs, yet this is still a culture assumed to exist in the margins.

Perhaps this isn't helped by the general sense of disconnect that



**“GAMERS COME
IN ALL SHAPES AND
SIZES. WE’RE UNIQUE.
NOT ISOLATED
WEIRDOES”**

those born after 1990 feel, being apparently ‘exiled on mainstream’ and seeking out those like them in equally far flung communities.

The stereotype of the gamer is well-worn, but not representative. They may be introspective, but are able to

indulge their inner extrovert through their gaming personas, and are given a sense of togetherness which dissipated as they migrated from mainstream social media.

We surveyed over a thousand under 30s in the UK and conducted interviews with prominent figures in the world of gaming. The vast majority of those we spoke to expressed simple boredom with mature platforms.

**"GAMING NOW
ACCOUNTS FOR
MORE THAN HALF
OF THE TOTAL UK
ENTERTAINMENT
MARKET."**



Although Facebook still retains the patronage of under 30s, 38% of our respondents professed to have left due to boredom; a number which increases for Pinterest (44%) Tumblr (45%) Snapchat (47%) but more dramatically, Twitter (52%).

These all point to quite a passive migration from the social media mainstream, but a close look at our respondents tells a different story. Nearly 60% of those questioned feel it is easier to talk openly in groups created for them and the like-minded, and there is also the feeling of being judged on mainstream social media.

Instagram in particular as a highly visual platform exposes them to the scrutiny of 'likes' which not only creates a context of judgement, but for those who need a friendly place to bring out their inner extrovert, it seems unduly critical and image focused.

So, who are they?

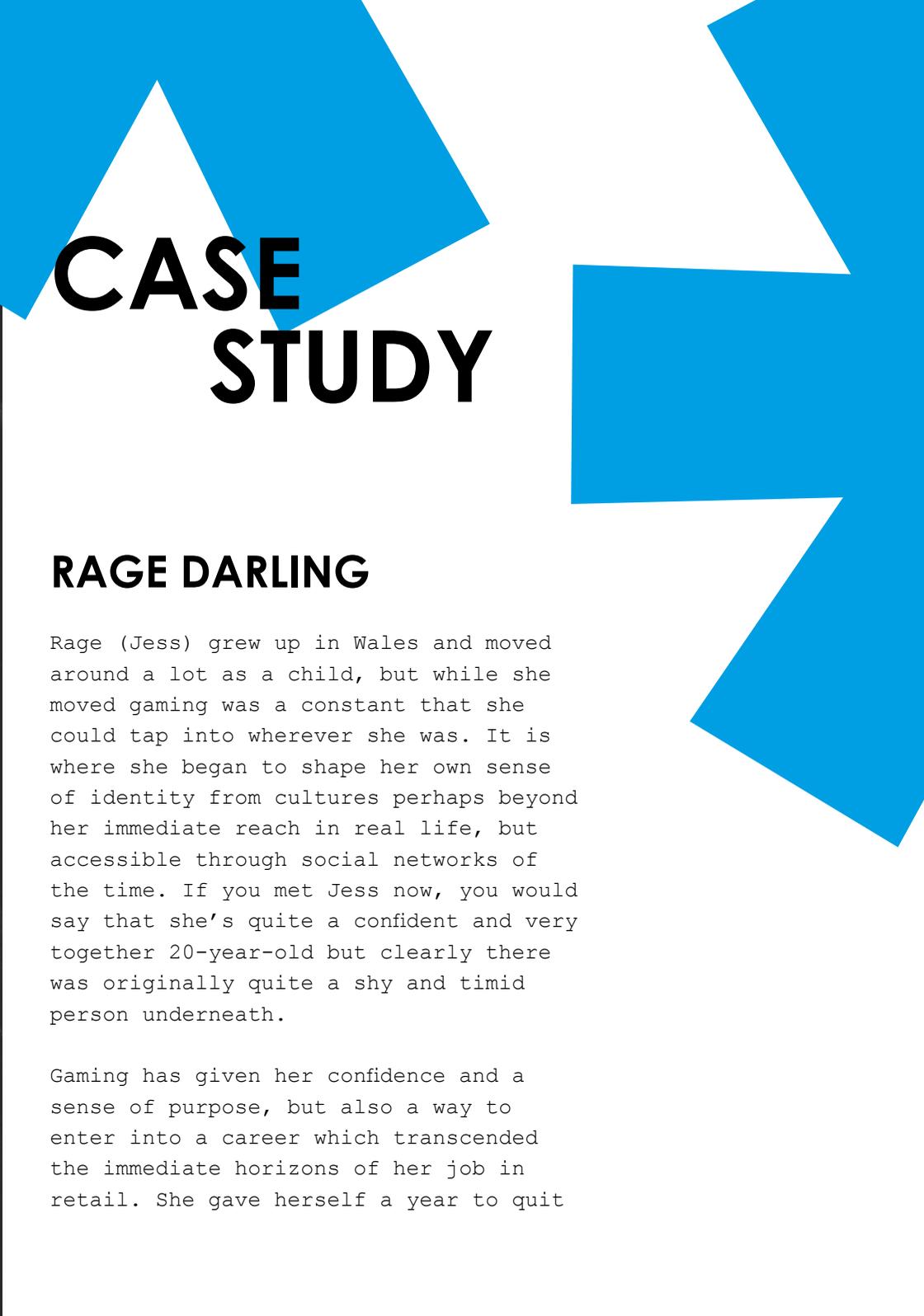
**NEARLY 60% OF THOSE
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**"IF THEY TOOK AWAY
THE LIKE FUNCTION
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WOULD BE A BETTER
PLACE TO BE"**





**"I KNOW
THOUSANDS OF
PEOPLE I CAN
GO AND HAVE A
CONVERSATION
WITH ONLINE"**



CASE STUDY

RAGE DARLING

Rage (Jess) grew up in Wales and moved around a lot as a child, but while she moved gaming was a constant that she could tap into wherever she was. It is where she began to shape her own sense of identity from cultures perhaps beyond her immediate reach in real life, but accessible through social networks of the time. If you met Jess now, you would say that she's quite a confident and very together 20-year-old but clearly there was originally quite a shy and timid person underneath.

Gaming has given her confidence and a sense of purpose, but also a way to enter into a career which transcended the immediate horizons of her job in retail. She gave herself a year to quit

and has done, successfully monetising her Twitch channel to the degree where it is no longer considered a distraction by her parents, but her job and income.

There is a clear parallel between Rage's entry into being self-employed and the emerging generation for whom university is unattractive due to the acquisition of huge debt and no assurance of a job, far less the opportunity to work within your life's passion.

More and more young people are embracing a sense of informal learning through platforms and devices and eschewing a typical education and career path in favour of pursuing passions as careers, whereas previous generations would have been dissuaded of the notion.

**"MORE AND MORE
YOUNG PEOPLE
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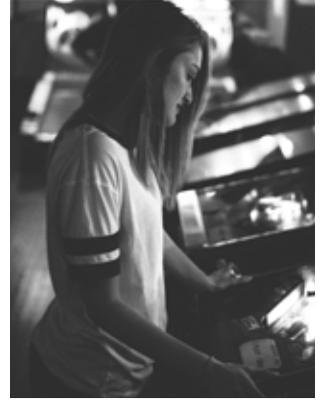


**"SHE WANTS HER
FOLLOWING TO
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WHERE SHE IS ABLE
TO HAVE A CLOSE
CONNECTION WITH
EACH VIEWER"**

All the while she was streaming herself gaming on Twitch which is where her online profile started to really grow. That's where 'Rage Darling' - her online persona - was born, and that's what her global audience follow. If you ask her about fame, she said she's not that driven by it.

Rage currently has 14,000 followers on Twitch and wants to keep it this way. She wants her following to stay at a number where she is able to have a close connection with each viewer, rather than being like other gamers such as Pewdiepie who cannot maintain a close connection with their millions of followers.

Tellingly, this is in sharp contrast to how a big social media brand would work. Saleable inventory is their lifeblood, but Rage understands the benefit of depth and true connection. Her subscriber base is not finite. As long as she remains true and connected to the culture of gaming, there is no limit to set on her



**57% CONSIDER
GAMING AS
A SOCIAL
PURSUIT, AND
THERE ARE
NUMEROUS
PHYSICAL
GAMING
EVENTS
THROUGHOUT
THE YEAR.**

rise.

Whoever gamers are – and as Rage Darling attests, they are not bound by a stereotype – they are seeking something in smaller communities. Over half stated that they ‘make them feel like they know why they are there’. There is also a sense that the vanity pursuit of numbers of online friends is passé and they are happier in tighter groups of interest.

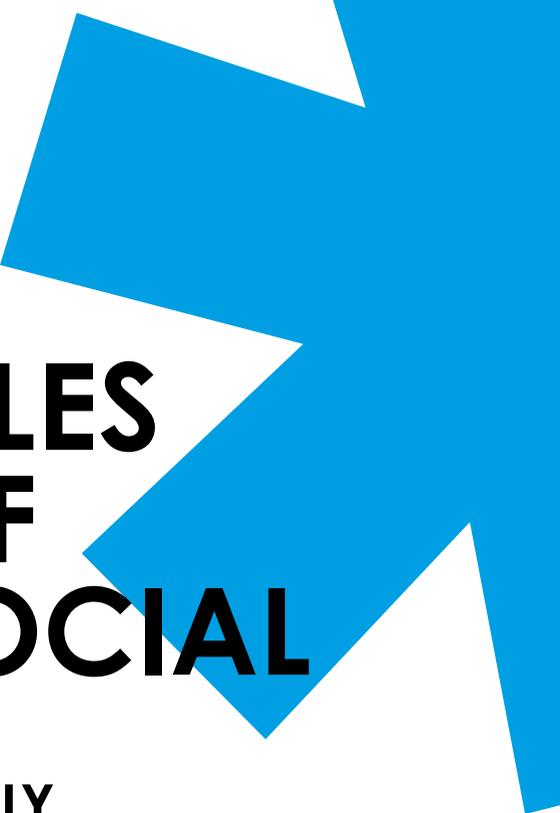
Perhaps the biggest misconception is of the gamer as a loner, existing in their bedroom, rarely seeking other human contact. Of the people we spoke to, 57% consider gaming as a social pursuit, and there are numerous

physical gaming events throughout the year. Insomnia 64 is a full weekend expo at Birmingham NEC attracting 68,000 fans in 2018, where fans and personalities meet and interact.

Gamers thrive in a unique manner. Not reliant on advertising to succeed commercially, they thrive on their authenticity - something which has become mainstream currency for brands, but which rarely occurs in the advertising mainstream. They monetise through subscriptions on platforms like Twitch, which allows them to showcase their alter-ego and personalities which the likes of Instagram simply cannot.



THE NEW RULES OF SOCIAL



BRANDS TENTATIVELY ENTER GAMING

As the opportunity to capture valuable 21-30 year olds diminishes in traditional marketing channels, big brands are slowly turning on to the opportunity that gaming offers.

Early examples of brands trying and somewhat succeeding in getting it right are Gillette's sponsorship of gamer Dr Disrespect, and Red Bull for their investment in building a physical esports arena - Their Gaming Sphere in East London.

But to succeed in situ, any brand must be considerably and naturally placed in the context of the game, not to shape the game around them, unless they have a role in the plot.

However, there may be an untapped opportunity in gaming events. Esports is already attracting pro players and interest from actual sports stars and football clubs setting up their own teams. But could this open the door for the creation of one-off in game events to deliver real scale, the like of which is greater than even commercial TV ratings?



Fortnite is one of the most popular games on the planet, ever. But when it received its biggest spike of unique users (10.7M), it wasn't because of its bombastic battles but a banging live concert hosted by Philadelphian DJ Marshmello. In the real world, brand sponsorship of these sort of events are standard. Why not on gaming platforms too?

IN SOCIAL MEDIA, CHOOSE YOUR WEAPON WISELY

So, what will become of the big dogs of social media?

**"THE DEATH
OF FACEBOOK
HAS BEEN
GREATLY
EXAGGERATED"**

Just as the death of television was predicted by the emergence of the web, the death of Facebook has been greatly exaggerated. Granted, the use has plateaued, just as TV has in the 21st Century, but this is merely a function of reaching critical mass, rather than mass migration. The post-Millennial





**"38% SAID THAT THE
SOLE REASON FOR
USING FACEBOOK
WAS THE CHAT
FUNCTION"**

generation merely use the layers of social media with greater purpose and specific intent.

Whilst Facebook retains high representation among Millennials and even Boomers, those born after them still use the mainstream for different purposes, from gaining mass numbers, to private groups to messaging.

- 38% said that the sole reason for using Facebook was the chat function

- 63% said that they prefer to talk in private message threads than in an open forum

WHERE BIG SOCIAL MEDIA STILL WORKS

Facebook, whilst not their core social media outlet, retains a sense of usefulness in terms of organising or activism. Those born after 1990 are acutely socially aware and active, and Facebook works well when trying to mobilise a mass of people and being seen beyond your immediate circle of interest or connections. Messaging is a main reason why they continue to use mainstream social networks.

I LIVED AN
HONEST LIFE
I WAS CHASTISED ON MY WIFE
I DON'T HAVE A HOME
MY PRAYER WAS SMALL
MY FUEL WAS SMALL
SO NOW,





THE FEELING THAT 'BIG' SOCIAL MEDIA SOLD ITS USERS OUT

There are two concerns. What others do on social media, and what social media itself fails to do to ensure probity and appropriate levels of community. This is particularly true of those born post 1990.



"SOCIAL MEDIA OFTEN EXISTS AS A NETHERWORLD"

WHAT OTHERS DO ON SOCIAL MEDIA

Social Media often exists as a netherworld between fame and anonymity, but those who are famous in the mainstream are prepared for this inevitability. Most who fall victim to trolling, or worse, are usually not as the stories of public shaming as made popular by Jon Ronson's 2015 book 'So You've Been Publicly Shamed' attested to.



In 2017, and an ill-considered Instagram post resulted in a little-known artist called Hettie Douglas, being driven from social media, showcasing the unfortunate tendency to form cyber lynch mobs in the mainstream channels.



WHAT SOCIAL MEDIA ITSELF FAILS TO DO

Facebook's belated stand on cyber bullying appeared too little too late, and because of their scale, they were unable to self-police as easily as a more niche social network is able to.

However, when the Cambridge Analytica scandal raised awareness of the vulnerability of their data being misused, users were naturally uneasy as this was no longer the work of trolls or mobs. This was a calculated and institutional betrayal of users' data.

In short, users became slowly sick of algorithms, newsfeed manipulation and on occasion, mood manipulation, and began to look elsewhere. In the next section we'll look more closely at this disconnect between what brands need and what users increasingly want.

**"THEY ARE THERE
ESSENTIALLY SELF-
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BREADTH OF
ACCEPTANCE"**

On the other side, there is the expectation that within a tighter network you will be more prone to opinion confirmation bias, where you form a view of the world from those like you, but in reality, this is far less likely than on Facebook.

To use gaming communities as an example, they are essentially self-policed by members from many walks of life, political persuasion and socio-demographic backgrounds, locations and faiths, which assures of a breadth of acceptance. Gamers are people first and gamers second. Even when their personas and alter egos are shaped by the culture like Rage Darling.

In the run up to the U.S. Presidential election in 2016 and the Brexit vote in the same year, many express surprise that both Trump was elected and Brexit happened. Most usually the most shocked were those over 30 who had been fed friendly news and views via social media algorithm, showing that the opportunity for opinion reinforcement is far greater through an algorithm, than when the community has a human in charge.



**“BRANDS THAT
IGNORE GAMING
ARE IGNORING A
DIAMOND IN THE
ROUGH.”**

THE EMERGING MAINSTREAM IN NICHE SOCIAL MEDIA

Andy Crysell of Crowd DNA recently stated that youth culture over the course of the late 20th Century grew from something to be feared and treated with suspicion, to something firmly in the sights of brands, and to be sold - hard!

**"MAINSTREAM
STARS ARE
ENTERING INTO
ONLINE STARS'
WORLDS"**

So, whatever was once in the shadows and margins of society - from mods and rockers, to skins and punks, to football casuals and Perry Boys to acid house, to grime and drill... all eventually became mainstream in some way, and with the volume of people who state that they game regularly, gamers are a (youth) culture whose time has come.

Ninja may not be a name that you necessarily know. However, 14 million+ of his Twitch community are pretty clear who he is. So, when world mega star Drake decides to team up, stream live and play games with Ninja, it's of mutual benefit to them both.

HOW SOCIAL MEDIA HAD IT ALL, AND THEN RISKED IT ALL

In our introduction, we spoke about the various failures of social media giants to create the utopia promised. A tall order to keep everybody happy, but when big brands began to feel uncomfortable about wider issues of data and influencer marketing, the social media brands' collective hands were forced.

In April this year, outgoing Unilever CMO Keith Weed stated that advertising was at a "trust or bust moment" but for many they had no such issues with trust in the networks they had migrated to and found a natural home within.

From these shifts in trust, we have shown how subcultures and communities have flourished in the wider, more accepting social space; in places where they can use communities to create an entrepreneurial ambition, on their own terms and became big enough to be a community for brands, but somehow still managed to fly under the radar of the mainstream.



FROM HYPER-TARGETING TO GRAVITATIONAL PULL

The most fundamental change in the social media dynamic in 2019 is the flow of traffic from being targeted by interest (Facebook) to being drawn to something which feels right or which serves a practical purpose on some level.

Social media is still used from the larger platforms to share and mobilise, to the niche places where we are enabled to be amongst those like us. The principles of mass mobilisation and individual identity meets when social purpose and momentum meet in real life.

Take for example the Trump protests. Accusations of 'affirmation activism' arise when it seems that a solely educated, middle class and privileged group of young people mobilised to protest with the aid of banners and placards which seemed to compete for social media likes and shares.

**"IT GIVES THE
OPPORTUNITY
TO PROTEST,
WORK, DONATE,
COMPETE"**





Whatever the motivation may be, it is clear that not only does the expanse of social media offer us the opportunity to protest, work, donate, compete or simply share, but the line is now being crossed where the principles of the virtual world now seem to be being appropriated in the real world.



**"HUMANS
ULTIMATELY
SEEK WHAT IS
EITHER FAMILIAR
OR NOVEL"**

IMPLICATIONS FOR BRANDS

1

UNDERSTAND THE VALUE OF CULTURAL PULL OVER 'TARGETED' REACH

And this means making better content that feels culturally correct and will have momentum of its own as a result.

If you have the right to enter into a space in social media which is either influential or valuable, it will be by invitation. Humans ultimately seek what is either familiar or novel, or the best-case scenario - something which manages to be both. A feeling like they are engaging with a part of something they recognise, but in a way that enhances your appreciation of it.

2

MAKE SOCIAL MEDIA WITH A USEFUL PURPOSE IN THE LIVES OF UNDER 30S

Gen Z has entered the world with their eyes open to the realities of life. They have the spirit of an entrepreneur and the heart of a hacker, shaping what they have around them to achieve personal, social or work goals.

Give them what they need to succeed in their dreams - either by connecting or informing.





3

MAKE AN EFFORT TO LOOK FOR, AND UNDERSTAND SUBCULTURES

Pretty simple this one. Hip Hop was once decried as a passing fad, and is now five decades old. People swap out of brands almost in an instant, but make lifetime commitments to cultures that they feel part of.

The reason gaming has crept up and now accounts for half the UK entertainment industry is because it started out as a subculture which few brands took seriously.

In short, be open minded, because the power of culture sustains like nothing else.

4

GET AS FAR AWAY FROM DEMOGRAPHICS AS POSSIBLE AND TARGET BY STATE OF MIND.

Even a supposedly niche group like gamers are a huge cross-section of people. Traditional reach and frequency do not apply to niche social media. Their smaller numbers have far greater depth, endorsement and ultimately, reverberation. Brands need to break their desire for breadth, and seek depth instead.

The social media space is a blunt tool at the mass end of the scale, which relies on catching numbers in nets; but niche networks rely on the heady use of culture to catch people willingly in their gravitational radius - and that's fine. They understand the culture within which they speak.

5

IT ISN'T ONE TO THE EXCLUSION OF THE OTHER

In reality, although young people are finding their own little corners of the social web, they will continue to use mainstream social media for specific purposes. Augmenting the mass awareness and OTS of an above the line campaign is valid on the bigger networks.



All we're saying is use platforms as you need, and tailor to your audience. If you are setting foot in culture, understand that niche social networks understand it way better than you are likely to.

6

START BELIEVING IN HUMANS AGAIN!

In general, all the supposed evil that big social media does seems down to lack of humanity. Algorithms and machine learning cannot behave with empathy. Over-targeting to the point of frustration is unlikely to be a conscious human action, but a human would certainly have set it in motion.

Humans generally police their spaces better. If you have to forego micro-targeting to achieve positive feeling and a captive and committed audience, that is a decision worth taking.



METHOD- OLOGY

- Qualitative interviews with prominent figures within a new social media 'culture'.
- Quantitative survey of 1,000 under 30s in the UK.
- Cultural deep diving - the hard yards. ZAK move at the speed of culture and in particular understand the rhythm of youth culture.

Through our 'SELFHOOD' network of under 30s throughout the world, we are placed at the vanguard of their lives and are able to authentically and considerately navigate a brand's place in the world of under 30s in 2019.

If your audience is born after 1990, we help brands to be in their world as a welcome addition, not an unwarranted interloper. We live their lives; know where to look, know who to speak to and what questions to ask.



GLOSSARY

At ZAK, we don't subscribe to catch-all terms like 'Millennial', 'Gen Z' and 'Gen X'. We believe that you can't see an audience through the lens of a generation or a specific set of characteristics. In order to understand a group of people, you must see them as human and understand the culture they love, the interests they have and the beliefs they hold.

For research purposes, here are commonly held definitions of those groups and other useful terms that come up throughout the report:

'BIG' SOCIAL: This refers to mainstream social media platforms such as Facebook, Instagram, Twitter and Snapchat.

BOOMERS: The baby boom generation, born following the Second World War and often seen as a group who reject the norm.

CAMBRIDGE ANALYTICA: A British firm which combined data mining, data brokerage and analysis with strategic communication



during electoral processes. The firm is most famous for its criticised collaboration with Facebook which involved the purchasing of users' data to be used for political means.

COLIN KAEPERNICK: Former American quarterback famous for kneeling during the US National anthem in protest against racial injustice and police brutality. He was the face of Nike advertising campaign, an appointment which caused controversy because of his links with protests.

DEPOP: An online site where people can buy, sell and discover the latest fashion.

DISCORD: A digital distribution platform for video gaming communities where they can watch and chat with other gaming fans around the world.

DRAKE: Canadian rapper, singer, songwriter, actor, producer and entrepreneur.

DR DISRESPECT: 37 year old man from America who is famous for streaming himself playing video games to over 1 million subscribers on YouTube, Twitch and Discord.

ESPORTS: Competitive playing of video games online, most often taking the form of organized, multiplayer competitions in teams.

FORTNITE: Popular online multiplayer video game played on Windows, Mac, Xbox and PlayStation and mobile.

GENERATION X:

They are the post baby boom generation that came before the millennials, born between 1960s to 1980s.

GENERATION Z:

Born after 1995, this generation are now hitting their 20s and starting to make their mark on the world.

HBO: American television network, famous for being the home of hit series Game of Thrones.

KANYE: Kanye West is an American rapper, singer, songwriter, record producer, entrepreneur and fashion designer.

MARSHMELLO: American electronic music producer and DJ who performed a live gig in video game, Fornite.

MILLENNIAL: Those born between 1980 and 1995. The eldest of this generation will be turning 40 this year and have grown up during the advent of Facebook.

MUMSNET: Parenting website providing knowledge advice and support to families on everything from babies to teenagers.

NINJA: World famous streamer of games such as Fornite on Twitch, YouTube and Discord with over 22 million followers.

PEWDIEPIE: 29 year old man from Sweden who is famous for streaming himself playing video games on sites like YouTube, Twitch and Discord to his 96 million subscribers.

PINTEREST: Social media site which acts as a virtual pin board where people go to find inspiration for things from fashion to lifestyle, beauty and travel.

RAGE DARLING: A 20 year old girl who is famous for streaming footage of herself playing video games including Fortnite to over 14,000 on Twitch and Discord.

SELFHOOD: ZAK's global network of under 30s who we reach out to for insight and inspiration. They are early adopters who are at the forefront of culture.

SNAPCHAT: A social network app established primarily as a photograph sharing site where users could share pictures for a maximum of ten seconds before they vanished. The app has now expanded to include text and location sharing too.

SOCIAL MEDIA GAMER: Someone who has an online profile which they use to play or watch video games.

SPORTS BANGER: Tottenham based "bootlegger" who puts a modern spin on retro sports clothing.

TUMBLR: A microblogging and social network site where people can post about whatever they want from music, fashion to lifestyle, film and beyond.

TWITCH: The world leading live streaming platform for gamers. On the platform they can live stream themselves playing games and watch others do so.

WAVEY GARMS: Wavey Garms began as a Facebook Group where people could buy and sell clothes. It has now become a cultural phenomenon in itself, being a place where you can go for fashion, music and cultural content.





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