

SELFHD**

Insights at the
speed of culture

THE NEW RULES OF SOCIAL

EP2:
FASHION

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.

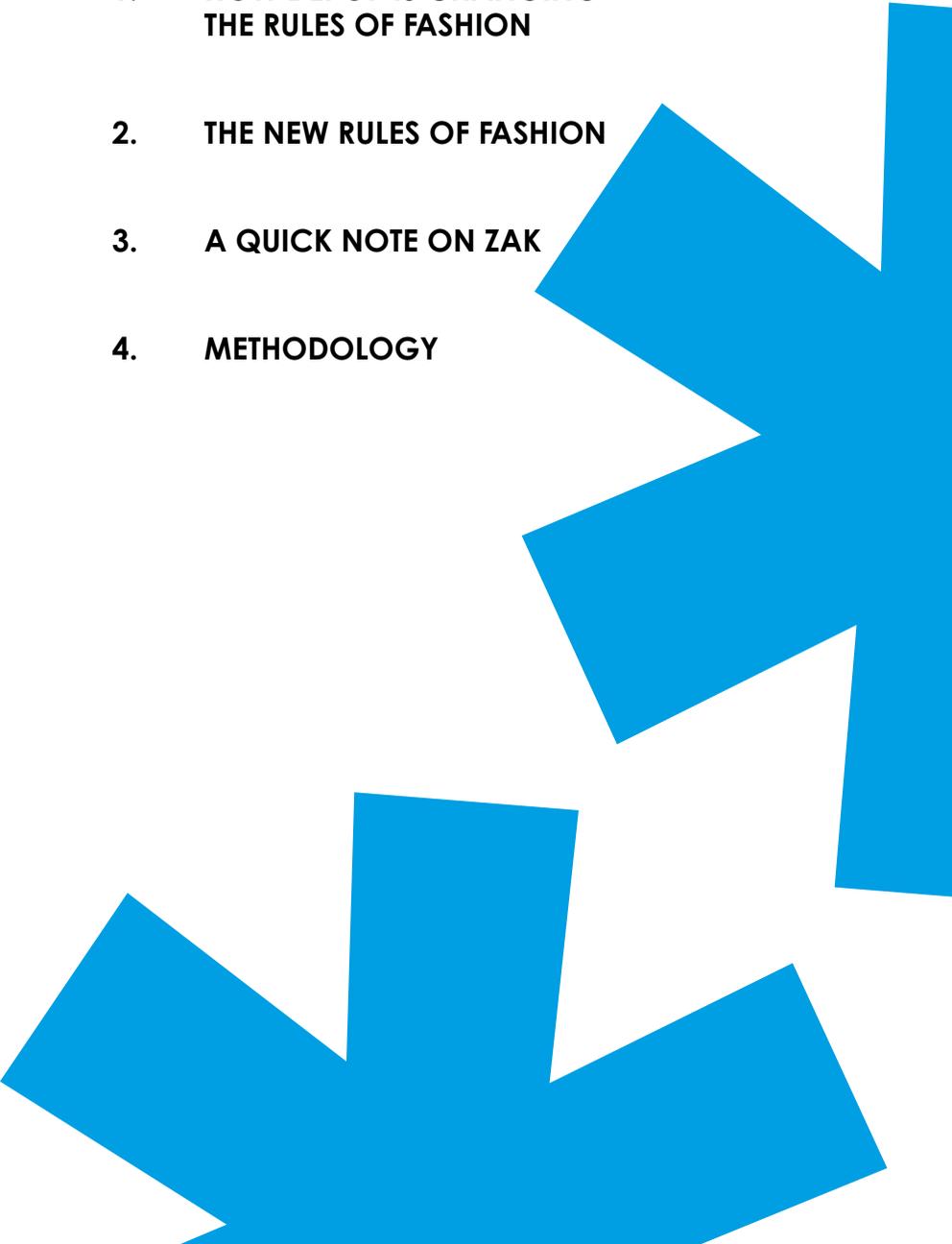
WHAT IS SELFHOOD?

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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HOW DEPOP IS CHANGING THE RULES OF FASHION

Do you remember that scene from *The Devil Wears Prada* where Meryl Streep eviscerates Anne Hathaway for her choice of blue knitwear? The premise is that the fashion industry dictates the aesthetics of regular people with a combination of overlord-like creativity and single-minded avarice.

There is a more than a kernel of truth to this Hollywood movie scene. The source of power in the world of fashion has traditionally come from the few. The Karl Lagerfeld's, the Kate Moss', the Anna Wintour's. A few people with untold influence over the many.



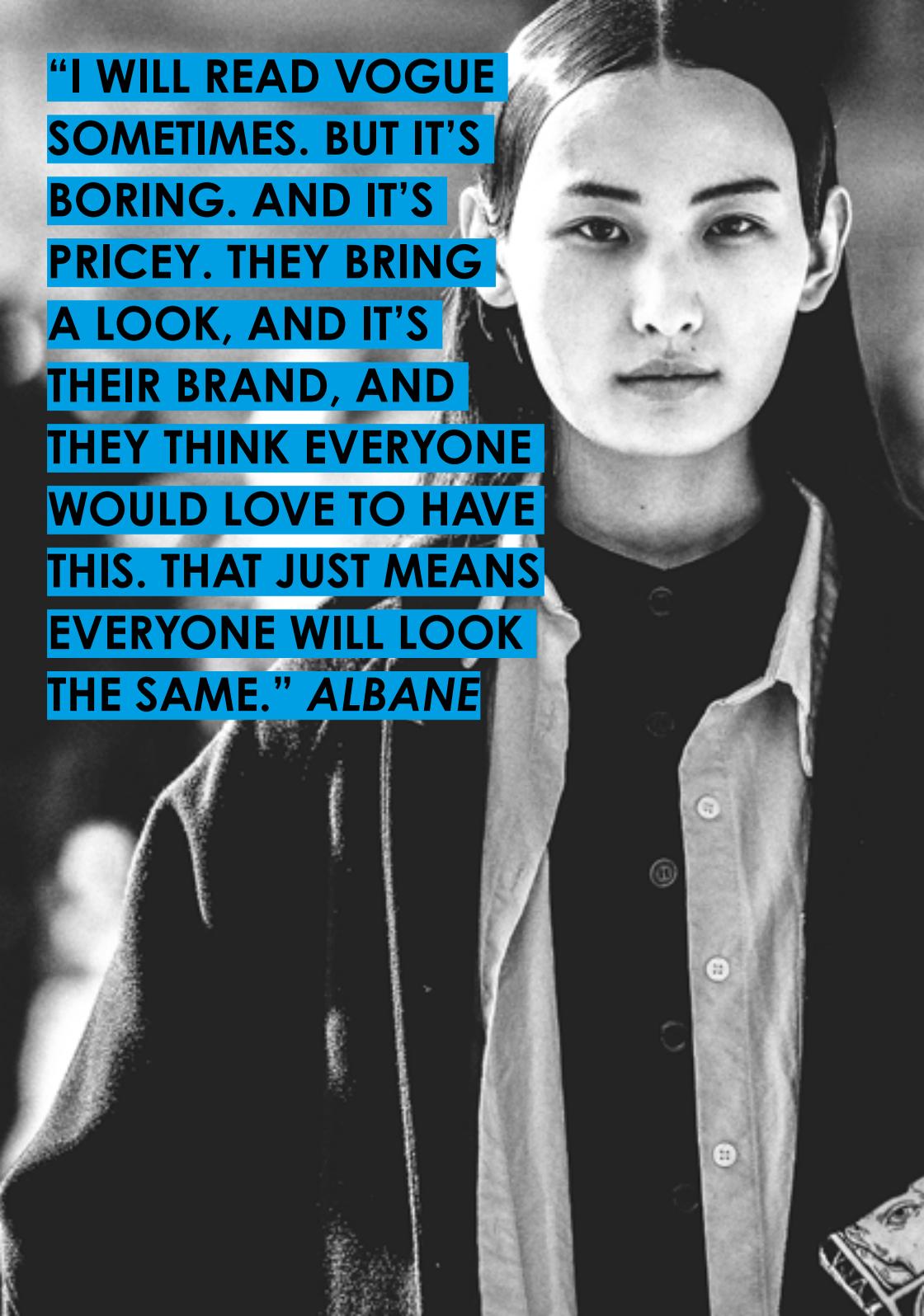
**“FASHION IS A STATEMENT.
IT SAYS SOMETHING
ABOUT WHO YOU ARE.”
ALBANE**

In truth, these goliaths have had it easy. For youth audiences, what you wear has always been the cornerstone of self-expression. 62% of the under 30s we researched, agree that what you wear is a statement about who you are, what you believe in, and what you stand for.* The clothes you wear play a fundamental role in developing and signalling your identity. This truth continues to dominate modern culture. Just look at Instagram. The leading social platform in the world is predicated, largely, on the idea of showing others what you look like.



The power of fashion remains, it's where that power resides that's on the move. To explore and understand more about this, our study has looked to the reseller space. The resale market amounts to about \$24b and is due to rise to \$51b by 2023. Fashion accounts for about 50% of it. It's big business, and it's getting bigger. We have spent time with a number of buyers and sellers on Depop to get a unique insight into why it's so successful and how it's disrupting the industry at large.

**“I WILL READ VOGUE
SOMETIMES. BUT IT’S
BORING. AND IT’S
PRICEY. THEY BRING
A LOOK, AND IT’S
THEIR BRAND, AND
THEY THINK EVERYONE
WOULD LOVE TO HAVE
THIS. THAT JUST MEANS
EVERYONE WILL LOOK
THE SAME.” ALBANE**



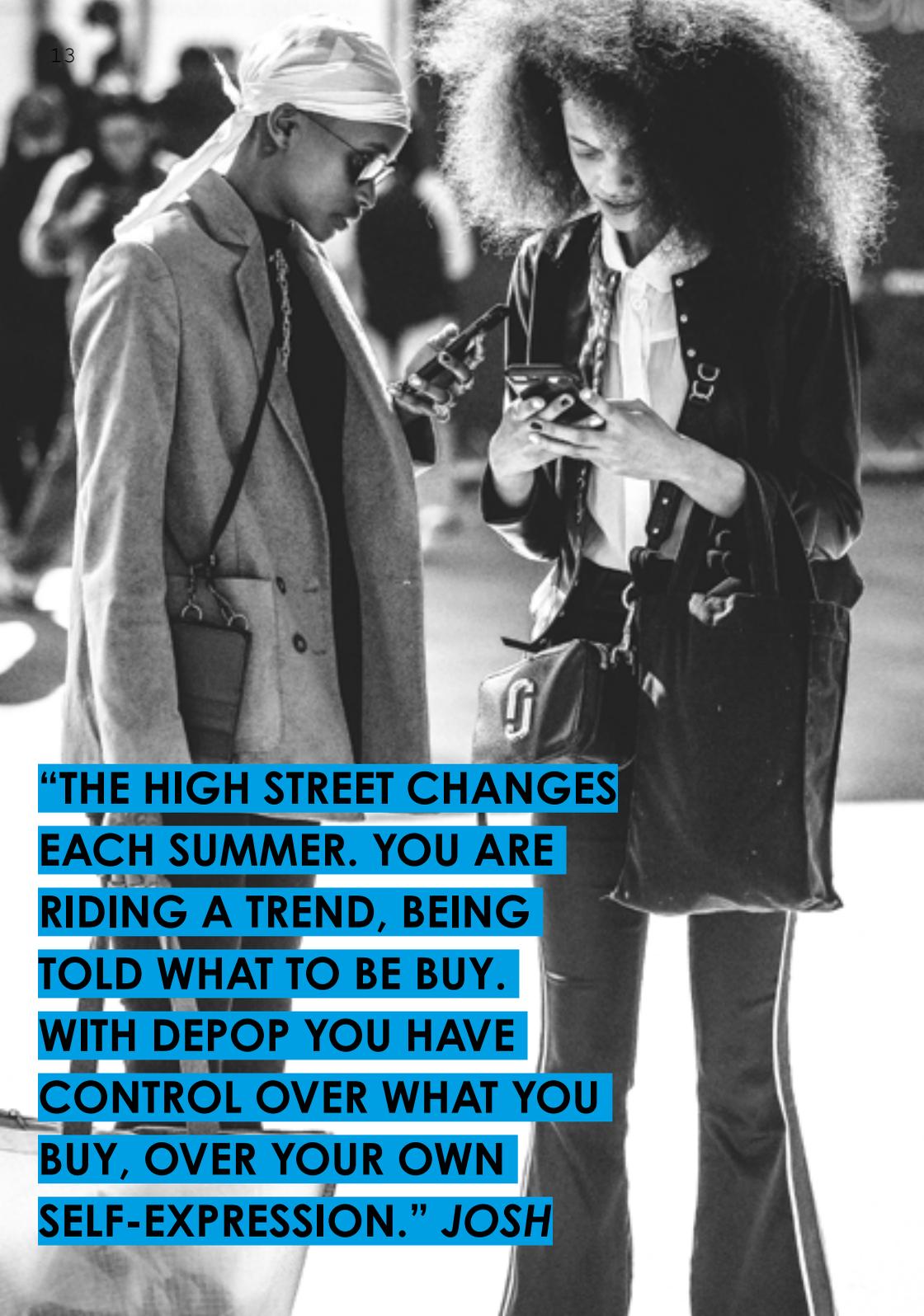
Let's take a step back and look at where fashion has traditionally lived. Not so long ago the likes of Vogue and GQ were the kingmakers of style. But the ground is shifting under them. As things stand right this minute, both Condé Nast and Stylist are presiding over unprofitable businesses. Sure, they'll claim their digital transformation strategies will soon yield the returns of the heydays. But the medium isn't the problem. Vogue and GQ are in the business of influence. And theirs is on the wane.

We've found that the top-down influence model is anathema to under 30s. It turns out they're not so keen on being prescribed ideas or ways of living. Who knew!? They want to make conscious and creative choices about the clothes they wear.

87% WANT CONTROL OVER WHAT THEY WEAR

This desire for conscious choice is the principle disruptive force in the world of fashion. And this is the essence of Depop. These young people don't want to be confined to the SS20 collections of a handful of high street brands. This will leave them looking the same as everyone else. The resale market gives them access to ALL the spring summer collections. The power is with them to curate their own style and identity. The ability to be independent and individual is genuine and real when you are creating your look from such a wide array of styles and seasons.





“THE HIGH STREET CHANGES EACH SUMMER. YOU ARE RIDING A TREND, BEING TOLD WHAT TO BE BUY. WITH DEPOP YOU HAVE CONTROL OVER WHAT YOU BUY, OVER YOUR OWN SELF-EXPRESSION.” JOSH

59% SAY FOLLOWING TRENDS MAKE YOU JUST LIKE EVERYONE ELSE

This may seem like a rehashing of the past, but there is real craft at work here. These reseller markets are allowing audiences to exercise their creative and entrepreneurial muscle. The sellers on these platforms are not just selling gear, they are carefully curating style and personality. Like-wise the people buying are after more than just product. They are buying the sellers themselves. Their personalities, their lifestyles, their ideas. Compare and contrast this human touch with commercial juggernauts like Zara, ASOS and Boohoo and it's easy to see why Depop is such an attractive option to under 30s on the hunt for their own distinct styles.



And there's the relationships. The interaction between buyers and sellers on Depop is not merely a transaction. They are creating a genuine dialogue. There is a back and forth. Even questions about size and fit take on a more human tone. For example, sellers will often go into the nuanced detail of how the garment will hang on different body shapes. A far cry from the bulldog clipped

**“I GET PEOPLE ON DEPOP
ASKING ME TO RESTYLE THEM.
TO HELP THEM BECOME A
DIFFERENT PERSON.”
SIENNA**

'size 10' models on ASOS. On a deeper level, sellers are akin to personalised shoppers and the briefs include intimate personal details. The kind of revelations usually reserved for BFFs only. They are not simply buying clothes, they are buying new identities.

**“IT’S NOT REWARDING
BUYING THE LATEST FASHION
SHOE THAT SOMEONE ELSE
HAS PICKED. YOU DON’T
HAVE ANY CHOICE ABOUT
BUYING THIS BRAND OR
ANOTHER.” ALBANE**

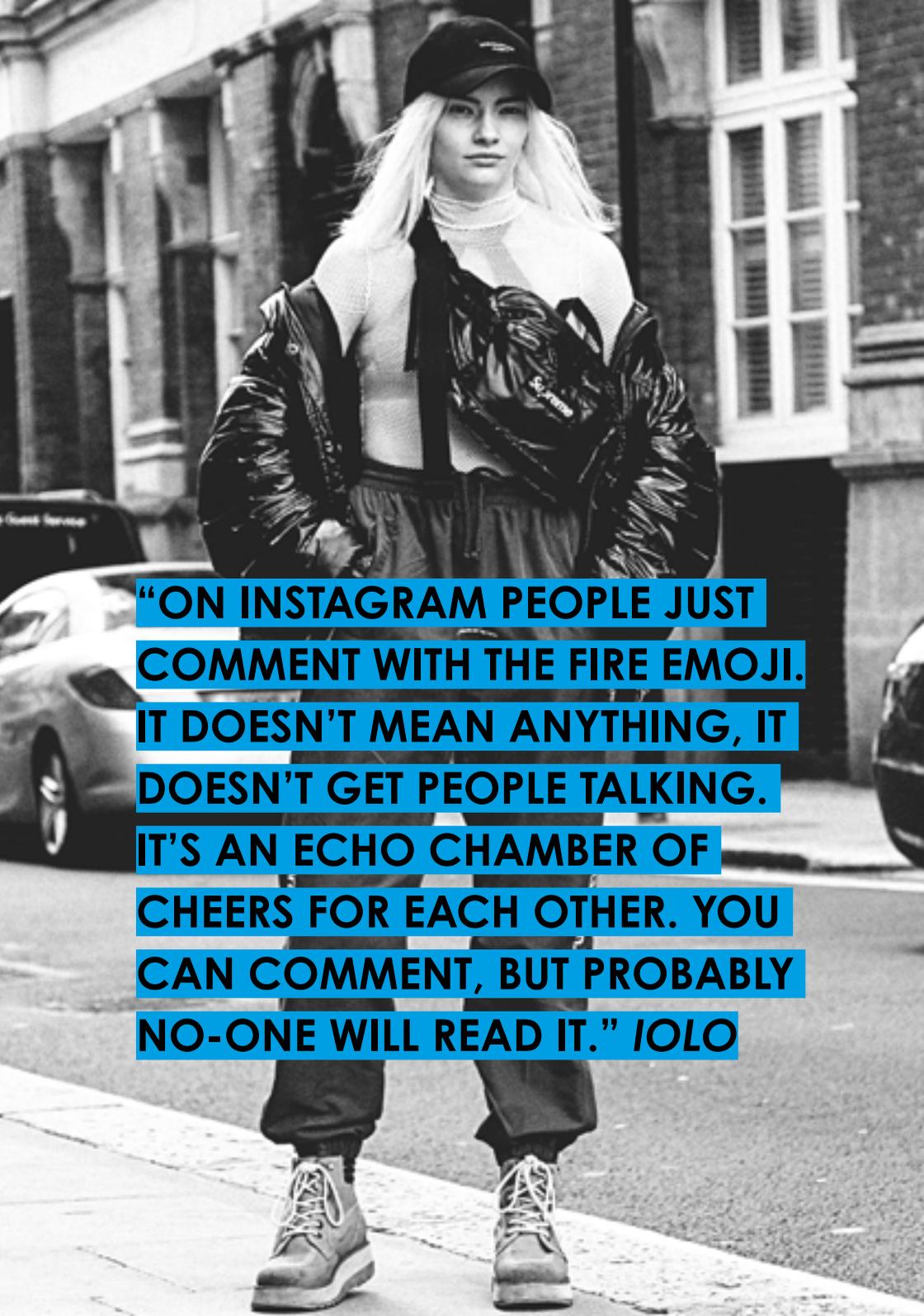


1 IN 5 SAY DEPOP SELLERS BRING A HUMAN TOUCH

The power of these interactions comes from their rarity. There are very few online spaces that encourage conversations to form in such honest and revealing ways. Take Instagram. A masterful platform for broadcasting yourself, but fatally floored when it comes to receiving messages back. The comments function is a vapid serenade of high five and



fire emojis. And Twitter continues to suffer from lunatics emboldened by their online anonymity. Safe, inclusive, empathetic spaces are scarce commodities. For now at least, Depop is a safe-haven for self-expression and experimentation.



“ON INSTAGRAM PEOPLE JUST COMMENT WITH THE FIRE EMOJI. IT DOESN'T MEAN ANYTHING, IT DOESN'T GET PEOPLE TALKING. IT'S AN ECHO CHAMBER OF CHEERS FOR EACH OTHER. YOU CAN COMMENT, BUT PROBABLY NO-ONE WILL READ IT.” IOLO

75% SAY THEY DON'T FIND PEOPLE LIKE THEM ON INSTAGRAM

An interesting side effect of these very human relationships is a distinct lack of toxicity. Instagram is widely seen as a place where you present a persona. It's an act. Sometimes done knowingly to entertain and build an audience. But there's also a darker side where young people feel the pressure of conformity. Either way, who you are is secondary to who your followers want you to be. Interestingly, we find that sellers feel more at ease presenting themselves on Depop than they do on their Instagram accounts. There is less judgement, more openness, more diversity.



**“I’VE MET LOADS OF
DIFFERENT PEOPLE ON
DEPOP. YOU CAN GET TO
KNOW PEOPLE WHO YOU
RESPECT, OR LIKE THEIR
STYLE, OR RELATE TO.” JOSH**

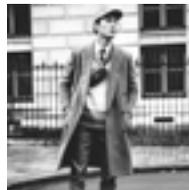


“DEPOP IS MORE OF AN
 HONEST SOCIAL MEDIA.
 YOU CAN DO THINGS
 ON YOUR OWN TERMS. I
 AM FREER TO BE MYSELF.
 THERE’S LESS PRESSURE.
 YOU DON’T FEEL LIKE
 YOU’RE BEING JUDGED. I
 WASN’T THINKING ABOUT
 PRESENTING MYSELF
 IN A CERTAIN WAY. MY
 PERSONALITY JUST SEEPS
 THROUGH NATURALLY.”

SIENNA



Ultimately with the reseller market, we're seeing power shift away from traditional media and the big fashion brands. And into the hands of the buyers and sellers on these platforms. Importantly, we need to recognise that what's going on at Depop is not confined to Depop. The wider world of fashion is feeling the devolution of influence too.



1 IN 4 SAY DEPOP GIVES THEM CREATIVE CONTROL OF THEIR STYLE



64% SAY THEY ARE BORED WITH HIGH STREET FASHION BRANDS

The smarter brands are already taking note. Take Rihanna's upcoming Fenty X Savage fashion show. It won't be launched in a cloistered runway to an audience of celebrities and industry folk. It will go direct to the audience via a live stream on Amazon. She is bypassing the old guard and going direct to those with the real power. The people.



In Rihanna's own words "I'm a bad bitch, I want women to own their own beauty". The pop music polymath is as prescient as ever.

The most exciting part is the licence to create. Culturally defining fashion ideas are no longer the currency of the few. Take Sport Banger. A 'brand' that began with a simple vision to subvert the establishment. These

bootlegs have emerged as a legit brand with a partnership with Slazenger. But just because he's legit, doesn't mean Jonny Banger has to conform to the rules. The prices are reasonable, it's stocked exclusively in Sports Direct and he turned his runway show into an acid rave in Tottenham. A far cry from the champagne receptions of Somerset House.



“ON THE HIGH STREET I FOUND THAT NOTHING FIT MY PERSONALITY. IT MADE ME FEEL LIKE SOMEONE ELSE. ON DEPOP THERE'S SOMETHING FOR EVERYONE. YOU GET WAY MORE CHOICE AND IT'S ETHICAL TOO. SELF-EXPRESSION MINUS THE GUILT!” SIENNA



“CLOTHES EXPRESS HOW YOU ARE. I PICK CERTAIN CLOTHES BECAUSE IT RESONATES WITH ME. NOW I’VE REALISED IT RESONATES WITH OTHER PEOPLE.” JOSH



Fashion is no longer governed by select individuals holed up in design houses in Paris or Vogue House, everyone has a role of play.





THE NEW RULES OF FASHION

HOW DO BRANDS GIVE POWER TO THE PEOPLE?

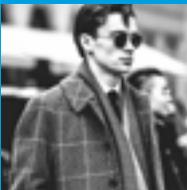
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DIRECT TO SOURCE

Media houses, publishers, influencers. Yes, they give you reach, yes they give you credibility. But sometimes you can bypass them. Show who you really value, who's really important to you.

What if...

you put on a runway show where you exclusively invite DEPOP sellers?



2

THE LOOK BACK CATALOGUE

This year Disney will make more money than any other film company. Ever. Not by writing new stories, but by remaking the old ones. Get in on the act. Go back into the vaults and reissue the pieces that still have meaning today. Giving these young audiences an alternative to empowers them to make decisions.

What if...

You created a range of reissued vintage?



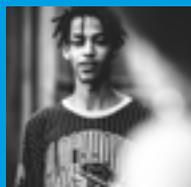
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BACK AND FORTH

Social media has turned into a one-way street of communication. Brands, celebrities and even politicians beam their messages into the feeds of their audience. But rarely is there anything close to an exchange. Bring back the discourse. Give your audience a voice.

What if...

You gave your product to your top DEPOP sellers and asked them to style it their own way?



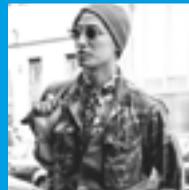
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SUPERSTARS COME LAST

The stars are often the ones to get things first. That new cosmetics range, the latest sneakers, the beta version we're all after. But what if we inverted that. What if the people who get the special treatments aren't the ones you expect?

What if...

**You beta tested the best product
with your best customers
(whoever they are)?**





5

LET ME IN

Mystery and intrigue have their place, but why not let people in? How you get to the answer is often more interesting than the final destination. Show your working, show your inspiration, take your audience with you.

What if...

You invited your audience into your creative process?



A QUICK NOTE ON ZAK

Just a quick note on why we've written this piece.

We're a creative agency and our ambition is to make the best work of our lives.

If we want creative work that's different and disruptive (and therefore commercially powerful). To do that, our insight needs to follow suit.

Pulling off the peg 'insights' from the likes of Mintel or spying our audience through the prism of Google is simply not good enough.

That's why we set up SELFHOOD.
It's our global network of savvy and
culturally aware under 30s.

Speaking to them gives us insight at the
speed of culture.

For this project we've conducted one-
on-one interviews with a select group
buyers and sellers on Depop. And we've
backed that up with a 1000 sample quant
study.

Get in touch to find out more:
hello@zakagency.com



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.



SIENNA

Depop seller (@spiderland)

Sienna began selling on Depop to make some extra cash when she was at university. She started off selling the leftover shoes from her parents' shoe shop, and now travels to markets and vintage shops around the world to collect unique pieces to sell to her 18,000 followers. Sienna spends the rest of her time running her family restaurant and performing with her band, Black Bordello.



JOSH

Depop seller (@thriftytowel)

Josh is a big believer in the power of fashion to express your identity. He sells streetwear to his 32,000 followers on Depop and also runs a standalone website where he sells clothing and publishes articles about fashion trends, with a particular focus on sustainability.





ALBANE

Fashion Enthusiast

Albane grew up in France, but now lives in London where she documents her daily style on her Instagram page, @AlbaneLC. She also uses Instagram as a platform to sell the many vintage pieces she collects from stores around the world.





IOLO EDWARDS

Founder of High Fashion Talks Facebook group.

From his home in Bangor, North Wales, Iolo runs the Facebook Group, High Fashion Talk. Founded in 2017, it's a place where fashion obsessives can meet and chat about the latest industry gossip, trends and launches. With over 25,000 members globally, the community also exists offline as its members often meet up in real life at fashion events.



DR ROSIE FINDLAY

Researcher and Writer, Fashion and Digital Culture.

London College of Fashion

Rosie is a writer and researcher in fashion and digital culture at the London College of Fashion. She has recently published a book, "Personal Style, Appearances that Fascinate", which looks at the history and rise of style bloggers and their relationship with both their readers and the fashion industry more broadly.





ZAK

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