

The Daily News

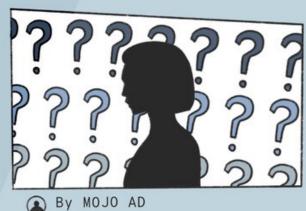
0

3

WHO IS YAYA?

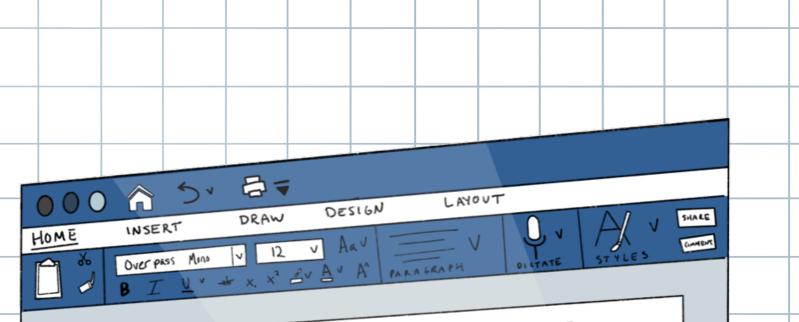
•••

\_



Originally coined by MOJO Ad, "YAYA" refers to 18- to 24-yearolds, or the youth and young adult market. These consumers are at a pivotal life stage in which they are figuring out who they are and what they like.

At 31 million strong in the United States and earning an aggregate income of \$463 billion, these consumers are choosing whether to stick with the brands they know or try new ones. If marketers fail to reach them, they might never catch up.



## WHAT IS STATE OF THE YAYA?

The State of the YAYA is an annual report that provides marketers with an in-depth look at the trends and activities of the 18- to 24-year-old market. Created by MOJO Ad staff, the report presents exclusive data on the YAYA market to help marketers connect with them on a deeper level. The report is based on a national quantitative survey of over 700 18- to 24year-olds that not only highlights who they are as consumers, but individuals as well with a deeper look at attitudes and behaviors towards media consumption and their life online.

### METHODOLOGY



Our 63 question survey was distributed nationwide through Qualtrics. This resulted in 724 completed responses from YAYA consumers. The sample was representative of the U.S. Census Bureau data for 18- to 24-year-olds related to race, ethnicity and gender.

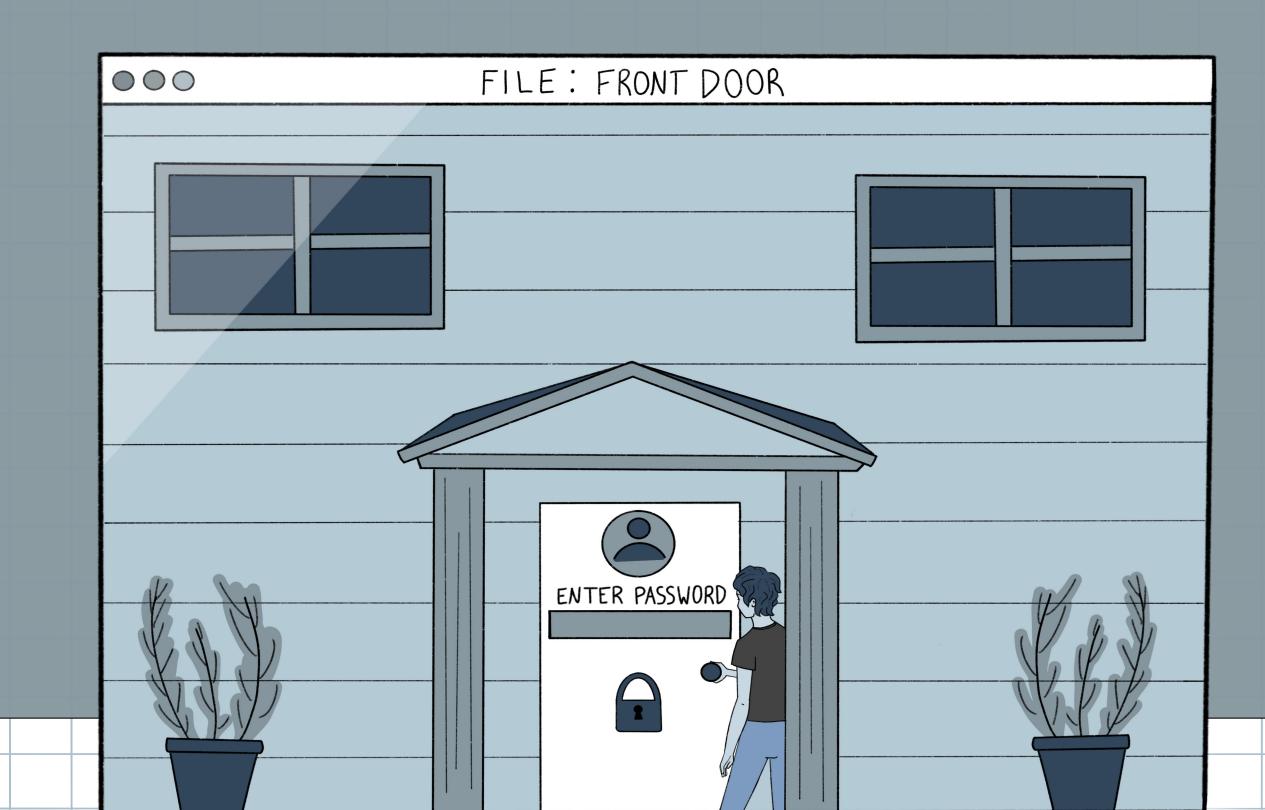
In addition to our primary research, we utilized dozens of secondary resources, including Mintel, Pew Research Center, Forbes, Statista and Nielsen, plus past State of the YAYA reports, to gain a better insight into the evolving YAYA market.

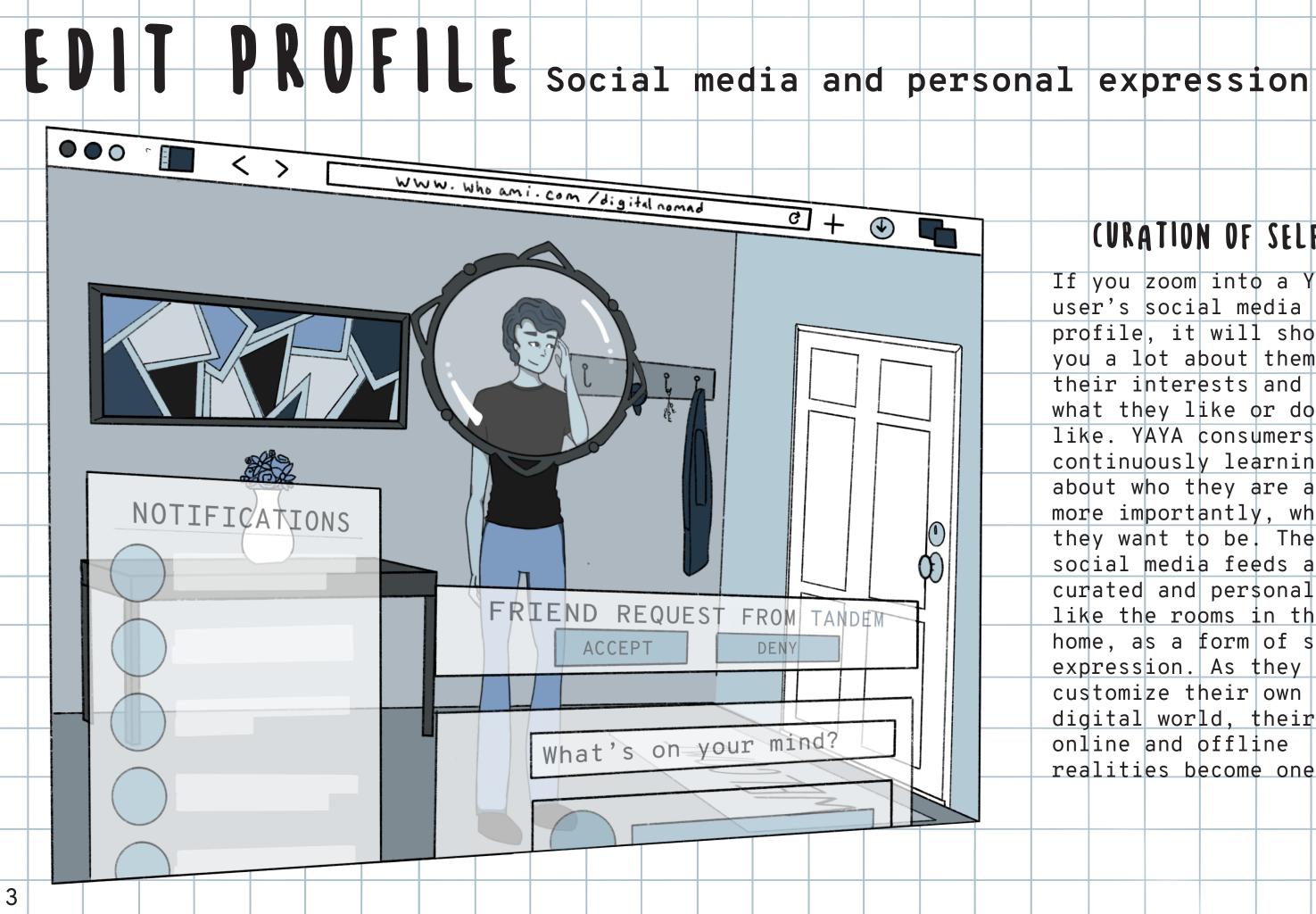
<sup>1</sup>Packaged Facts. (2018, July) Looking Ahead to Gen Z: Demographic Patterns and Spending Trends. https://www.packagedfacts.com/Looking-Ahead-Gen-Demographic-Patterns-Spending-Trends-11270817/

| O Work                  | Prologue                            | 1   |   |                              |             |
|-------------------------|-------------------------------------|---|---|------------------------------|-------------|
| O School<br>O Bills     | Edit Profile                        |   | and the second se | The Game Plan                | 21          |
| O Pictures<br>O Hobbies | Insight: Curation of Self           | 3 V   |   | Ready Player One             | 23          |
| Locations               | Inspect Element: Looking at Data    | 3-4   |   | Insight: A New Kind of Athl  |             |
| Desktop<br>Documents    |                                     | <sup>5-6</sup> Inspect Element: Looking at Data |   |                              |             |
|                         |                                     | 7-8   |   | Keeping Tabs + Bookmark This | Brand 27-28 |
| V                       | 🔲 Digital Nomads                    | 9 >   |   | Zooming Out                  | 29          |
|                         | Insight: Life on the Open Internet  | 9-10 >  |   | Attributions                 | 31          |
|                         | Inspect Element: Looking at Data    | 11-12   |   |                              |             |
|                         | Keeping Tabs + Bookmark This Brand  | 13-14   |   |                              |             |
| V                       | 📕 Now Playing                       | 15  |   |                              |             |
|                         | Insight: Entertainment as Essential | 15-16   |   |                              |             |
|                         | Inspect Element: Looking at Data    | 17-18   |   |                              |             |
|                         | Keeping Tabs + Bookmark This Brand  | 19-20   |   |                              |             |
|                         |                                     |   |   |                              |             |

## FOR YAYA CONSUMERS, USING TECHNOLOGY IS MUCH MORE THAN JUST AN ACTIVITY. IT'S THEIR LIFE.

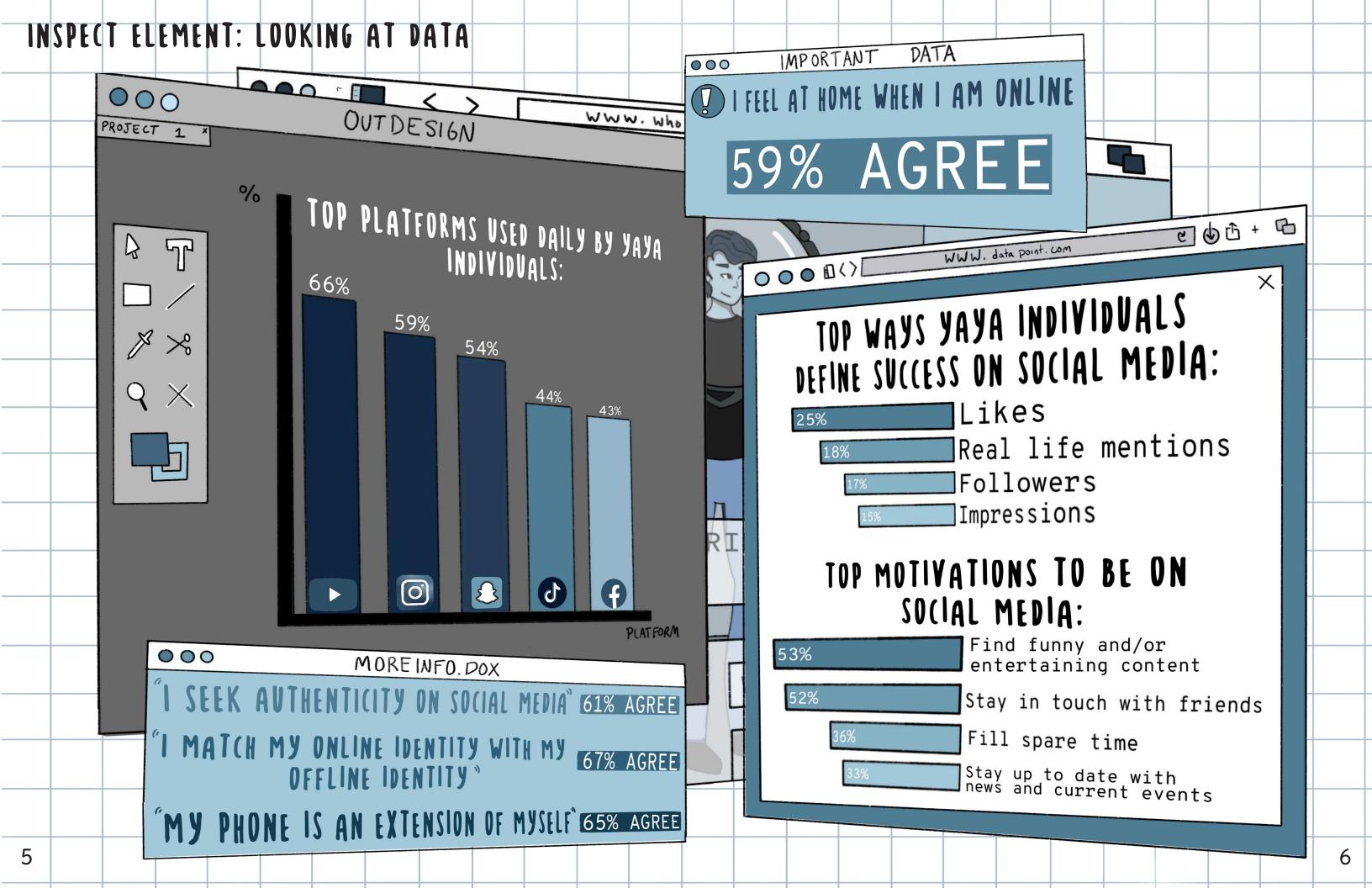
Their online presence is just as personalized and comforting as the space they live in. They kick their feet up there. They relax there. They live, eat and breathe a virtual identity. When 18- to 24-year-olds are online, they are home. It's not enough to just be in the virtual community of these digital homebodies - it's time to knock on their digital doors to unlock who they really are.





### CURATION OF SELF

If you zoom into a YAYA user's social media profile, it will show you a lot about them, their interests and what they like or don't like. YAYA consumers are continuously learning about who they are and more importantly, who they want to be. Their social media feeds are curated and personalized, like the rooms in their home, as a form of self expression. As they customize their own digital world, their online and offline realities become one.



As YAYA individuals traverse the internet in search of discovering who they are, they continuously try different styles and take pride in curating who they are online. As they do this, they explore brands who are also true to themselves and pick and choose which brands fit, or don't fit, into their curated identities.

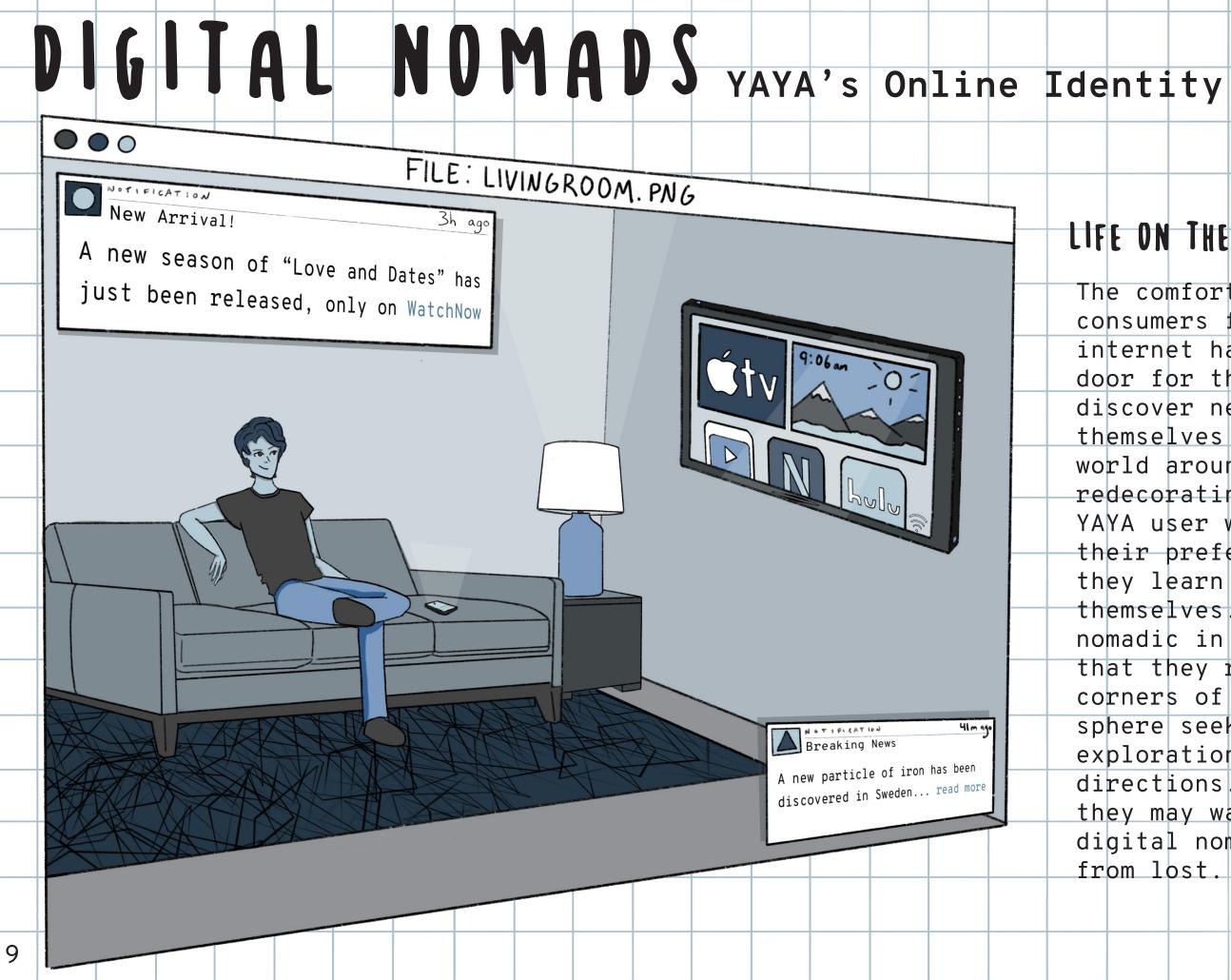
If the YAYA market does not find what they are looking for, they won't hesitate to unfollow. It's important for brands to celebrate the uniqueness of the YAYA market as customization is key.

Much like the satisfaction of finally having a room set up just the way you like it, the YAYA market wants the same customizable elements to their services and products.

Noted for being "the world leader in made hair care, skin care and body products invites customers to share their specific the quiz.

Realizing that one type does not fit all, can also have their name printed on the product labels, showing that it doesn't take experiences by adding a special touch of personalization.

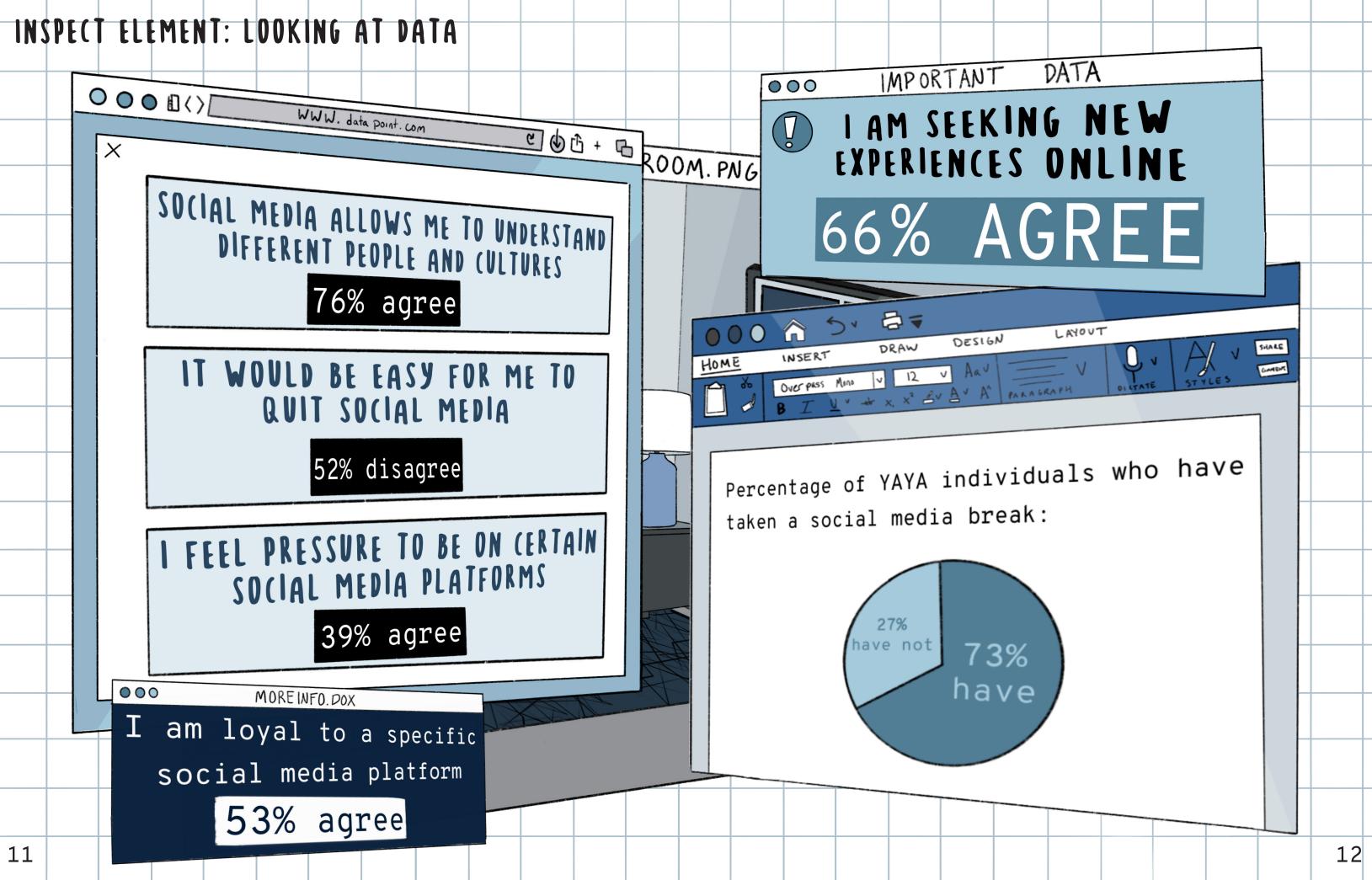




### LIFE ON THE OPEN INTERNET

|                | mfor         |       |       |      |    |    |
|----------------|--------------|-------|-------|------|----|----|
|                |              |       | on    |      |    |    |
| ern            | et h         | as o  | pene  | d th | e  |    |
| r f            | or t         | hem   | to f  | reel | у  |    |
| cov            | er n         | ew i  | deas  | abo  | ut |    |
| mse            | lves         | and   | the   |      |    |    |
| ld             | arou         | nd t  | hem.  | Lik  | e  |    |
| eco            | rati         | ng a  | roor  | m, a |    |    |
|                |              | -     | chai  |      |    |    |
|                |              |       | ces   | -    |    |    |
|                | 1            |       | e abo |      |    |    |
|                |              |       | ey a: |      |    |    |
|                |              |       | sen   |      |    |    |
|                | hey :        |       |       |      |    |    |
|                |              |       | dig   | ital |    |    |
|                |              |       | sel   |      |    |    |
|                |              |       | d nev |      |    |    |
|                |              |       | thou  |      |    |    |
|                |              |       | r, tl | -    |    |    |
|                |              |       | are   |      |    |    |
|                | ost.         | liaus | αιι   | TUT  |    |    |
| III - <b>L</b> | <b>υ</b> ςι. |       |       |      |    |    |
|                |              |       |       |      |    |    |
|                |              |       |       |      |    | 10 |
|                |              |       |       |      |    | ΤŪ |
|                |              |       |       |      |    |    |





YAYA consumers live, work and play online, so their virtual lives become their windows into the world. Due to this, the YAYA market does not see a difference between their online experience and their offline experience. This is why the YAYA market seeks rich and immersive experiences whether they are online or offline.

They want brands that can offer extraordinary omni-channel experiences that can surpass shopping in the physical stores. Marketers can serve as a GPS, guiding the YAYA market to roam and discover new content that fulfills their need to seek new directions.

Not only does the YAYA market crave customization, they also want to forge their own path. Spotify excels in guiding digital nomads on their path toward discovery through "Discover Weekly" playlists. Each week, the playlist is born out of Spotify's taste profile for each user and curates a playlist featuring new artists and genres. The taste profile assigns certain scores to various artists and genres based on how central it is to the listener's history and preferences, creating a perfectly curated, unique-to-user playlist for them to learn about new music they might also enjoy.

As augmented reality becomes a household name, it is also making it easier for brands to enhance their consumer experiences. IKEA launched the AR app "IKEA Place" to allow customers to try IKEA furniture in their space without leaving the comfort of their home. All customers have to do is upload a picture of their room and see how the furniture fits their space from different angles, allowing them to explore what they like and try different styles.

Spotify

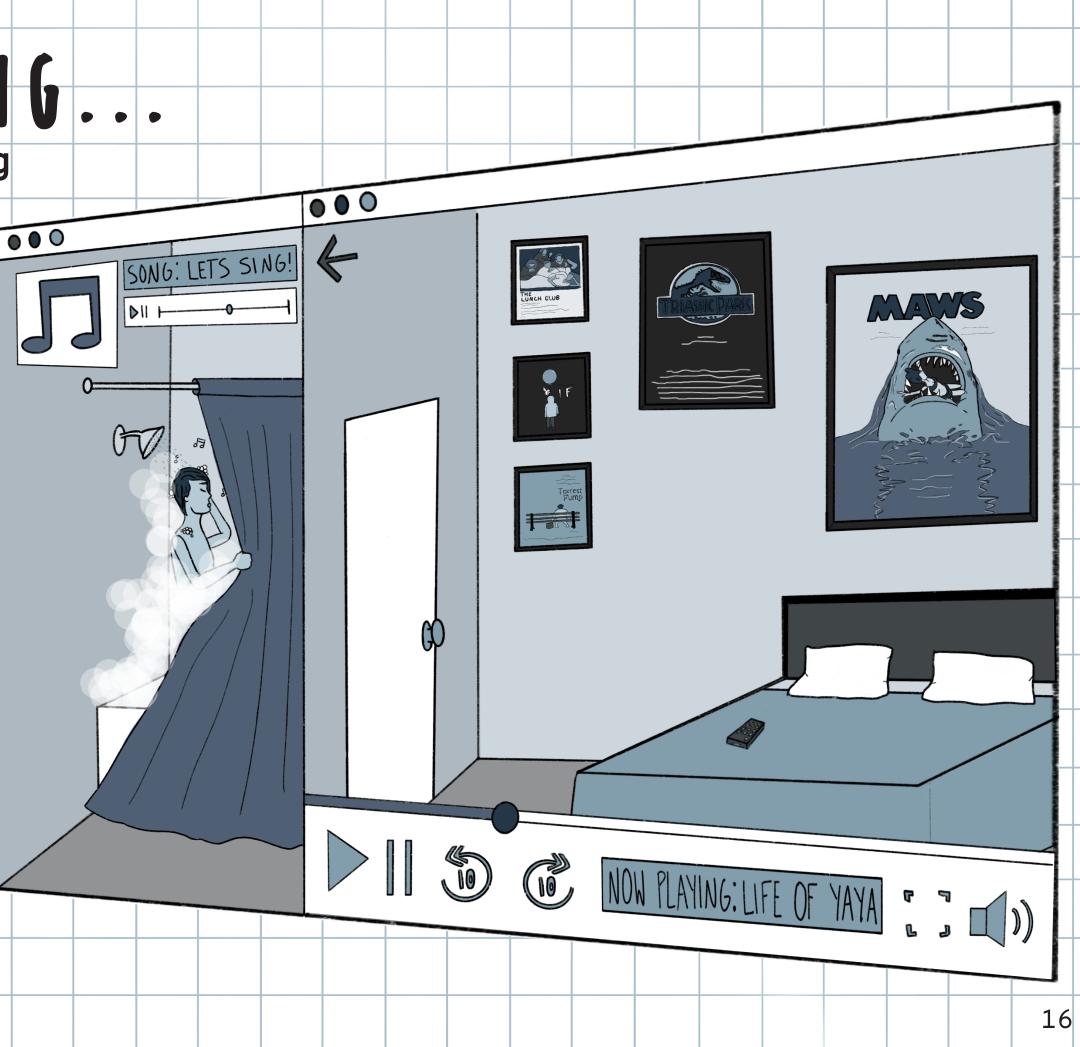
# **BOOKMARK THESE BRANDS!**

Sephora launched the AR app "Sephora Visual Artist," which uses AR and facial recognition technology to allow customers to try on different products without visiting the store. Whether customers want to compare shades of **SEPHORA** lipstick or find an eyeshadow that compliments their eye color, this seamless digital experience meets the expectation the YAYA market has for every online shopping trip.

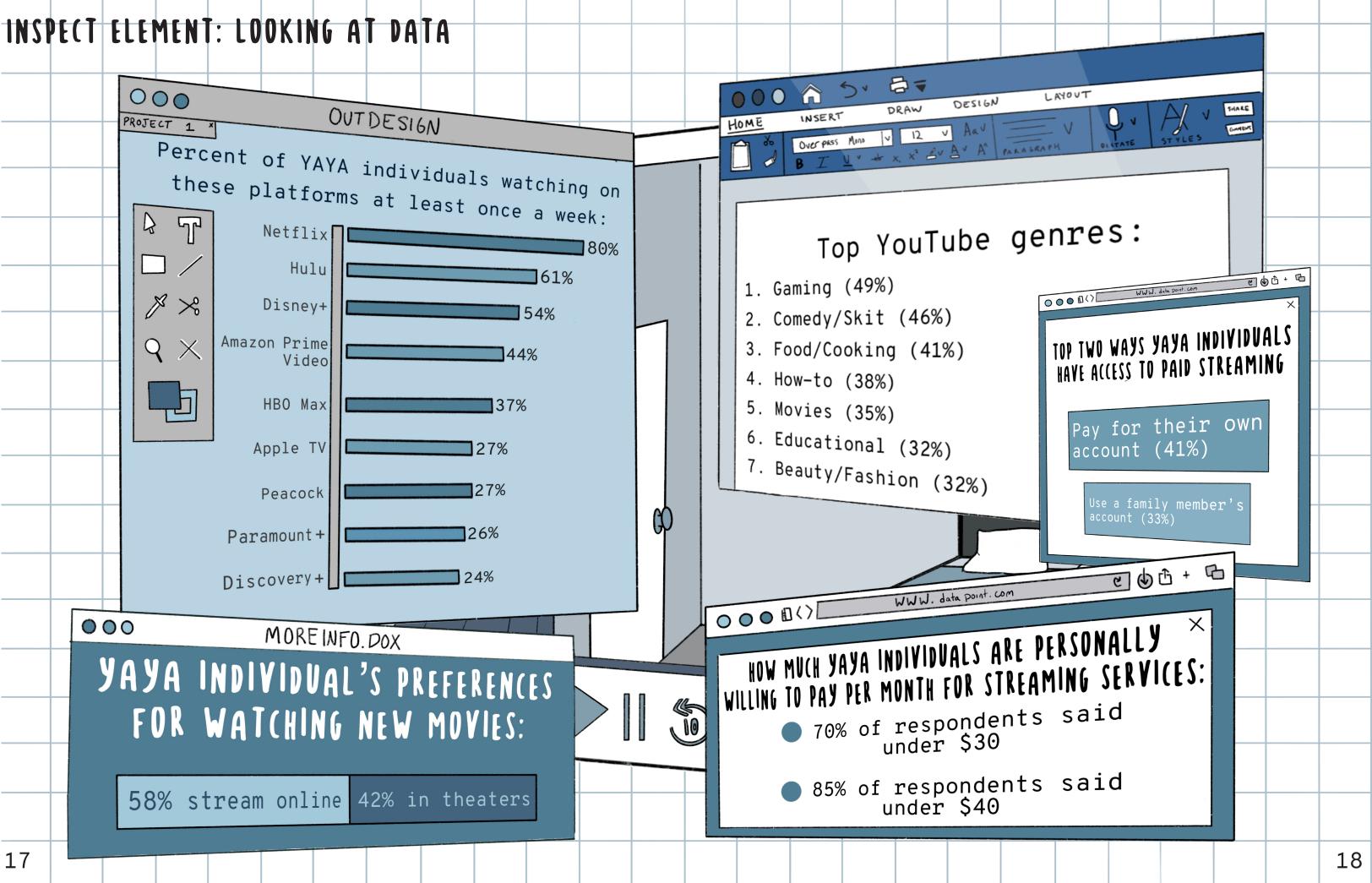
# **NOW PLAYING.** The power of streaming

### ENTERTAINMENT AS ESSENTIAL

Entertainment. Food. Shelter. Water. YAYA consumers are redefining the essentials and making room for entertainment. Whatever platform they are using, they kick their feet up and expect to be entertained. Entertainment is their primary motivation for being online, so digital nomads are willing to roam any and all platforms to satisfy this need. Let's settle into our inner couch potato and see where these YAYA individuals go to relax and unwind.



### INSPECT ELEMENT: LOOKING AT DATA



What could possibly be worse than an alarm clock ruining a good night's sleep? An advertisement interrupting a YAYA individual's essential entertainment. This sets up the perfect opportunity for marketers to utilize product placement in the YAYA market's favorite shows or movies. In fact, consumers in this demographic view product placement more positively compared to traditional advertising<sup>2</sup>.

Through their need to be entertained 24/7, YAYA audiences exhibit an "entertainment mindset," and it is suggested that brands tap into this by making their platform a world of entertainment, socialization and selfexpression.

<sup>2</sup>Acklin, M. (2020, May 18). Gen Z Thinks Product Placements Are More Effective Than Traditional Ads. CivicScience. https://civicscience.com/ gen-z-thinks-product-placements-are-more-effective-than-traditional-ads/

19

## **BOOKMARK THIS BRAND**!

TikTok

The always on "entertainment mindset" of YAYA consumers stretches beyond just streaming platforms and can be found through apps as well. We suggest brands tap into this mindset by placing it at the forefront of their advertising and marketing. TikTok is a perfect place for marketers to do this. What was a five minute break on TikTok can easily turn into hours for most users of the app. Scrolling from video to video on the app creates an endless cycle of entertainment.

 THE GAME PLAN
 A transit

 Image: Construction of the state of the stat

The YAYA market wants to see

traditional sports. They want

humanization of athletes in

to see athletes' lives off-

their talents on-screen. In

order to feel an authentic

about them and what goes

rolling.

on when the cameras aren't

screen as much as they watch

connection to their favorite

players, they value learning

NFL End Zone dances have evolved from being

a pain for referees to being a source of joy for YAYA fans. After taking notice, the NFL established a partnership with Twitter that set up cameras in the end zone to capture the players' celebratory moves. NFL Chief Marketing Officer Tim Ellis said the decision was "100% focused on that younger audience," guiding a new marketing mantra that humans are better than highlights<sup>5</sup>.

YAYA Many consumers would rather settle into man cave than be taken а out to the ball game. They want short-form videos<sup>3</sup> that can be watched anywhere, at any time, from their home base. Of the YAYA individuals who watch sports, YouTube scored the highest in terms of where they get their sports-related content. Although the experience of a live sporting event is hard to beat, this market has officially opted in to streaming videos and highlights. The YAYA market values knowing athletes beyond the field, ranking a fun and engaging personality as the top characteristic that makes an athlete interesting and using their influence as a force for good as a close second<sup>4</sup>.

9 SEARCH

growing-faster-live <sup>4</sup>Team Whistle. (2020). A New Age In Sport Consumption. Retrieved from https://teamwhistle.com/insid <sup>5</sup>Maese. R. (2020. November 24). Sports has a Gen Z problem. The pandemic may accelerate it. Washing

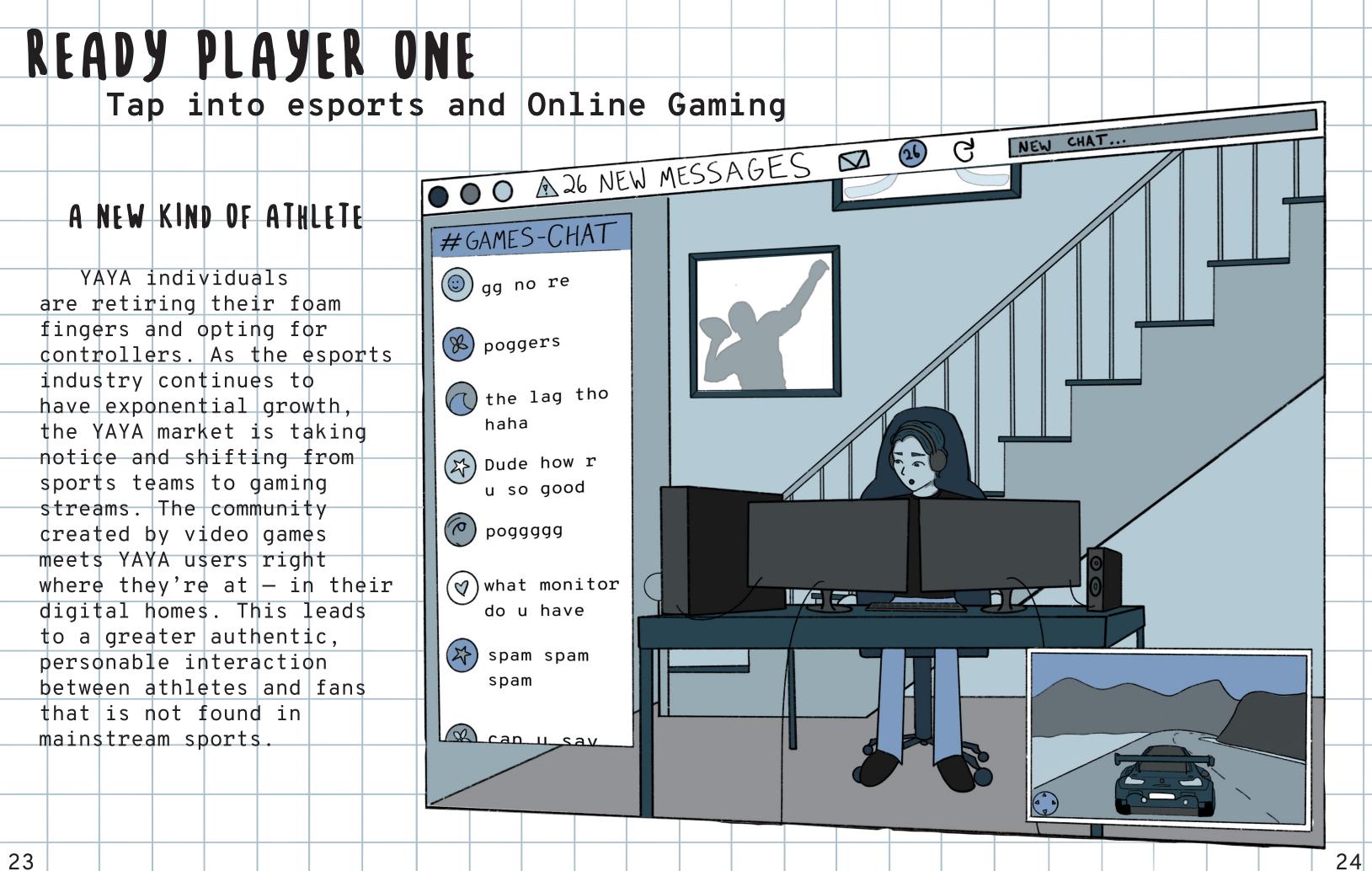
### A transition period for sports

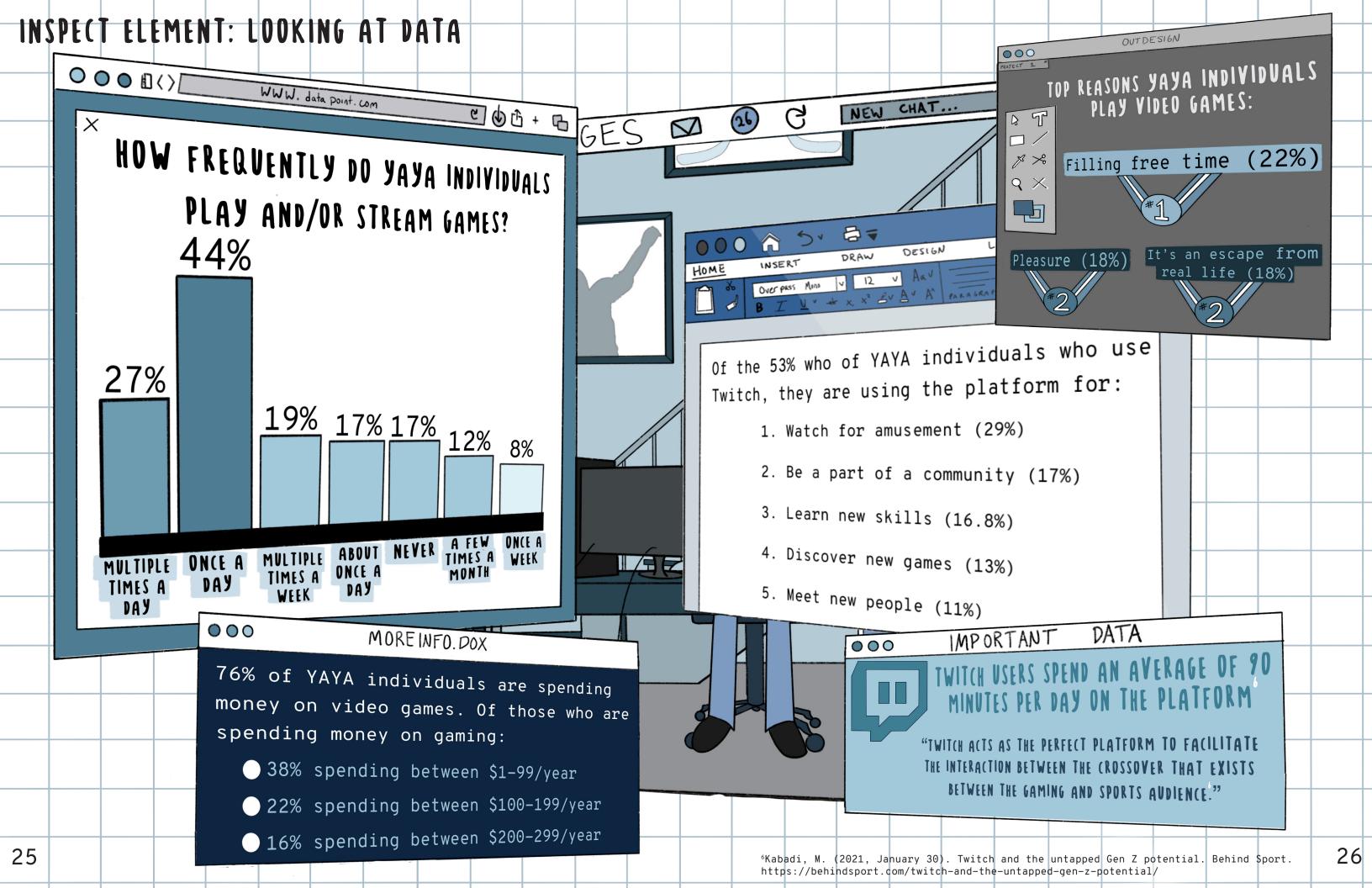
 $\backslash$ 

ON-FIELD TO ON-SCREEN

tps://twocircles.com/gb-en/articles/clips-highlights-valu

/www.washingtonpost.com/sports/2020/11/24/gen-z-sports-fans/

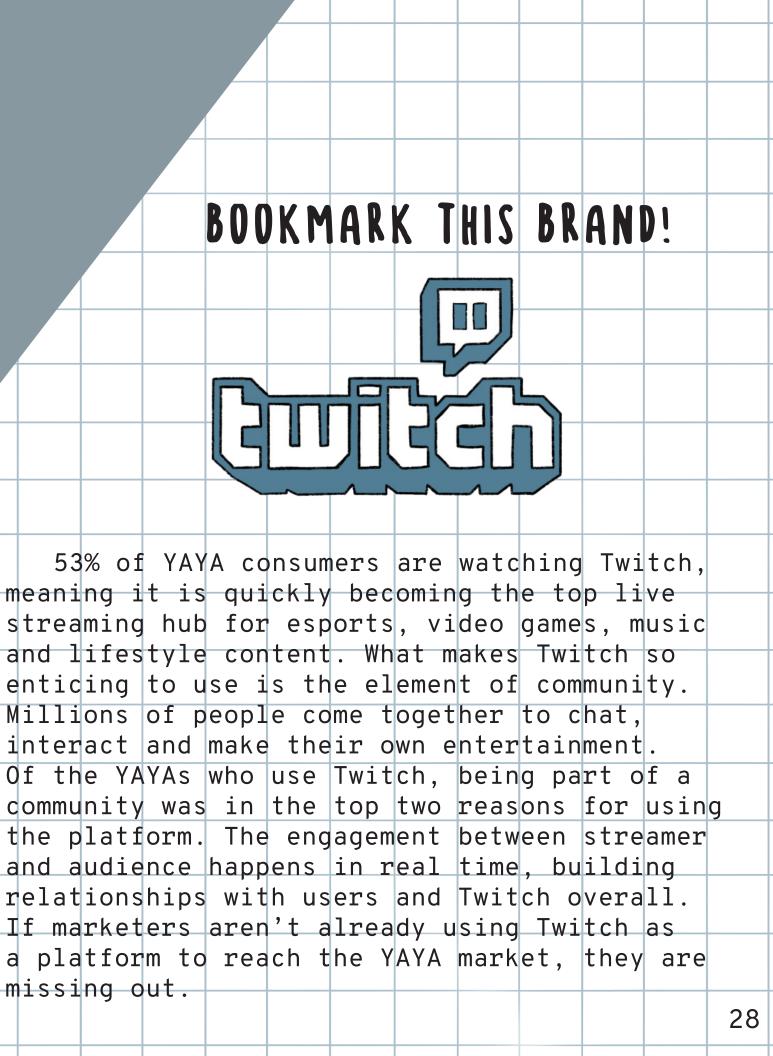




Women have been moving into the gaming sphere for years with 31% of YAYA individuals who identified as women playing or streaming video games daily. As brands increase their foothold in the gaming industry, they need to acknowledge this change.

Marketers have the chance to reach the entire gaming community by creating a supportive and inclusive network for female gamers.

27



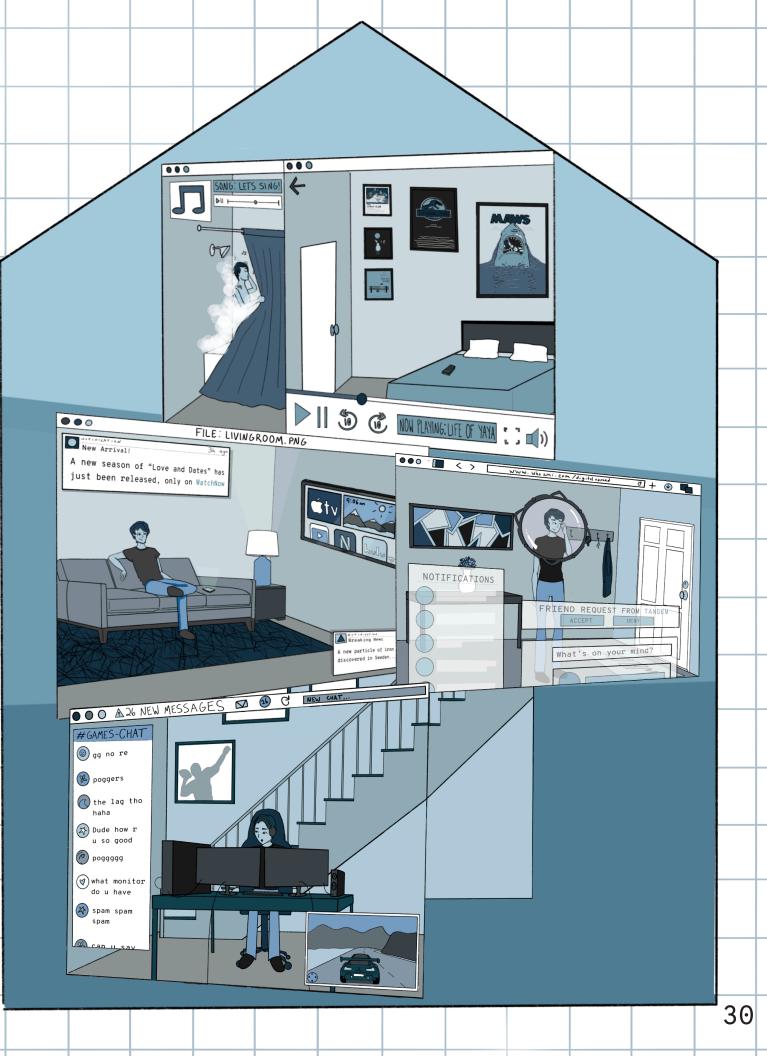
missing out.

# ZOOMING OUT

### **Unlocking Potential**

Now that you have unlocked the virtual abodes of YAYA consumers, make yourself at home! As this age group continues to evolve, they will only become more crucial to every industry. Being online is not just a pastime, it's their lifeline, providing a comforting space for these digital homebodies to learn about who they are and who they aspire to be. In order for your brand to get ahead, it's important to take a look inside the OS windows of this group to grasp the depths at which they seek personalization and customization of their online experiences.





## ATTRIBTUTIONS

- 1. Packaged Facts. (2018, July) Looking Ahead to Gen Z: Demographic Patterns and Spending Trends. https://www.packagedfacts.com/Looking-Ahead-Gen-Demographic-Patterns-Spending-Trends-11270817/
- 2. Acklin, M. (2020, May 18). Gen Z Thinks Product Placements Are More Effective Than Traditional Ads. CivicScience. https://civicscience.com/gen-z-thinks-product-placements-are-more-effective-thantraditional-ads/
- 3. Cutler, M. (2019, October 21). Rate of growth for clips and highlights to OUTSTRIP live five-year projections. https://twocircles.com/gb-en/articles/clips-highlights-value-growing-faster-live/
- 4. Team Whistle. (2020). A New Age In Sport Consumption. https://teamwhistle.com/insights/2020/12/anew-age-in-sport-consumption
- 5. Maese, R. (2020, November 24). Sports has a Gen Z problem. The pandemic may accelerate it. Washington Post. https://www.washingtonpost.com/sports/2020/11/24/gen-z-sports-fans/
- 6. Kabadi, M. (2021, January 30). Twitch and the untapped Gen Z potential. Behind Sport. https:// behindsport.com/twitch-and-the-untapped-gen-z-potential/

### BACKGROUND SOURCES

- Arat, Z. (2020). Generation Z in lockdown. Essence. https://www.essenceglobal.com/article/generationz-in-lockdown
- Barnhart, B. (2020, September 3). Twitch marketing: What it is and how brands can do it right. Sprout Social. https://sproutsocial.com/insights/twitch-marketing/
- Boolaky, Y. (2020, May 20). How to Utilize the Gaming Community to Promote Your Next Product. Influencer Marketing Hub. https://influencermarketinghub.com/how-to-utilize-the-gamingcommunity-to-promote-your-next-product/
- Buckle, C. (2018, February 20). Gen Z Prefer Fun Content Over Friends on Social. Global Web Index. https://blog.globalwebindex.com/chart-of-the-day/gen-z-social/
- Clark, D. (2019, January 16). 10 Defining Characteristics of Generation Z. TTI Success Insights. https://blog.ttisi.com/10-defining-characteristics-of-generation-z
- Cosenza, A. (2020, August 11). The Live Stream Movement through Gen Z. Thrive Global. https:// thriveglobal.com/stories/the-live-stream-movement-through-gen-z/
- Deloitte Insights. (2020, June 23). Digital media trends survey, 14th edition. https://www2.deloitte. com/us/en/insights/industry/technology/digital-media-trends-consumption-habits-survey/summary. html
- DeSalva, A. (2020, September). Mass Merchandisers: Incl Impact of COVID-19 US December 2020. https://reports-mintel-com.proxy.mul.missouri.edu/display/987354/?fromSearch=%3Ffilters. category%3D122%26freetext%3Dretail%2520gen%2520z%26last\_filter%3Dcategory
- Dunn, M. (2020, February 11). What Gen Z is Watching Online and What That Means for Marketers in 2020. Social Media Today. https://www.socialmediatoday.com/news/what-gen-z-is-watching-onlineand-what-that-means-for-marketers-in-2020/572021/
- El-Khoury, J. (2020) Characteristics of social media 'detoxification' in university students, Libyan Journal of Medicine, 16:1, DOI: 10.1080/19932820.2020.1846861
- Francis, T., & Hoefel, F. (2020, December 16). 'True Gen': Generation Z and its implications for companies. https://www.mckinsey.com/industries/consumer-packaged-goods/our-insights/truegen-generation-z-and-its-implications-for-companies#
- El-Khoury, J. (2020) Characteristics of social media 'detoxification' in university students, Libyan Journal of Medicine, 16:1, DOI: 10.1080/19932820.2020.1846861
- Francis, T., & Hoefel, F. (2020, December 16). 'True Gen': Generation Z and its implications for companies. https://www.mckinsey.com/industries/consumer-packaged-goods/our-insights/true-gengeneration-z-and-its-implications-for-companies#
- Georgiev, D. (2021, February 11). Gen Z Statistics What We Know About the New Generation. Review42. https://review42.com/resources/gen-z-statistics//
- Hersko, T. (2020, April 14). The Average American Is Streaming 8 Hours of Content Daily Report. IndieWire. https://www.indiewire.com/2020/04/average-american-streaming-eight-hoursdaily-1202225085/

- Hissong, S. (2020, September 23). Want More Gen Z Stone. https://www.rollingstone.com/pro/fea trends-1064844/
- Hodak, B. (2018, March 6). New Study Spotlights G
  https://www.forbes.com/sites/brittanyhodak/
  consumption-habits/?sh=2d2eb53e42d0
- Lo, B. (2019). Pay TV and Bundled Communication S Report. Mintel. https://reports.mintel.com/
- Lok, C. (2020, June 1). How Gen Z is shaping tren how-gen-z-is-shaping-trends-during-covid-19
- Meyers, A. (2020, September 15). With In-Person G Events Have Yet to Fully Captivate Gen Z. M com/2020/09/15/virtual-events-gen-z-polling
- O'Halloran, J. (n.d.). Consumers shift to streami com/2020120459522/consumers-shift-to-stream
- Pannekeet, J. (2018, February 21). Newzoo: Global as Brand Investment Grows by 48%. Newzoo. H esports-economy-will-reach-905-6-million-20
- Peisner, D. (2020, July 21). Concerts Aren't Back New York Times. https://www.nytimes.com/202
- Pragnell, J. (2021). Spotify: Why it's Effective weareglacier.org/edu-marketing-blog/why-spo
- PRNewsWire. (2020, June 23). Deloitte: COVID-19 A and cancellations. https://www.prnewswire.c of-paid-entertainment-subscriptions-and-car
- Selig, A. (2020, August 31). Generation influence wpengine.com/resources/gen-z-2020-full-repo
- Spajic, D. J. (2020, February 10). Spotify User S KommandoTech. https://kommandotech.com/stat
- Spotify. (2019, May 20). From Tony Bennett to Tyl Discovering. Spotify Newsroom. https://news la-yaweh-here-are-the-artists-18-to-24-year
- Statista. (2017). Sports viewed on selected devic statistics/786744/sports-viewed-selected-de
- Statista. (2020, September 14). Most followed spo statista.com/statistics/1074264/sports-lead
- Taylor, R. (2020, January 16). How Gen Z and Mill duction Teams. Rev. https://www.rev.com/blo what-that-means-for-production-teams
- Team Whistle. (2020). Gaming in 2020. Team Whistl ing-in-2020
- TransUnion. (2020, December 3). Survey Finds More tion Expected to Continue in 2021. GlobeNew news-release/2020/12/03/2139276/0/en/Survey Platforms-Migration-Expected-to-Continue-in
- Yahr, E. (2021, January 12). The pandemic forced entertainment forever. Washington Post. htt ery/2021/01/12/pandemic-entertainment-change
- YPulse Inc. Youth research and insights. 3 Stat Services. (2019, December 9). https://www.y millennials-start-using-streaming-services/
- YPulse Inc. Youth research and insights. (2020, Events for Quarantined Young Consumers. ht ing-the-rise-of-virtual-events-for-quarant
- YPulse Inc. Youth research and insights. (2021 ing Mainstay. https://www.ypulse.com/artic2 ing-mainstay/

|                      | Spotify E<br>spotify-ge                     |           |                        |                       |                      | ling      |
|----------------------|---|-----------|------------------------|-----------------------|----------------------|-----------|
|                      | Unique Mu<br>3/06/new-s                     |           |                        |                       |                      | ic-       |
|                      | - US - S<br>/920018/                        | eptember  | 2019 - M               | arket Res             | search               |           |
| nds duri<br>9/       | ng COVID-                                   | 19. PR Da | aily. htt              | ps://www              | .prdaily.            | com/      |
|                      | gs on Hol<br>Consult.                       |           |                        |                       | arketing             |           |
| ming-in-             | asses in<br>-masses-in                      | n-2020.ht | ml#axzz6               | LS3cybPY              |                      |           |
| https://             | s Economy<br>(newzoo.co<br>nd-investr       | om/insigh | ts/artic               |                       |                      |           |
|                      | treams Ar<br>/arts/mus                      |           |                        |                       |                      | The       |
|                      | hing Gen<br>S-effectiv                      |           |                        |                       |                      |           |
| com/news             | tes cycle<br>-releases<br>ons-30108         | s/deĺoitt | e-covid-1              |                       |                      |           |
|                      | ing gen z<br>n_Z_are_tH                     |           |                        |                       |                      |           |
|                      | cs That ₩<br>′spotify-u                     |           |                        | our Ears              |                      |           |
| sroom.sp             | , Here Ar<br>ootify.com<br>are-discov       | n/2019-05 | tists 18-<br>-20/from- | to 24-Ye<br>-tony-ben | ear-Olds<br>nett-to- | are<br>ty |
| ces in t<br>evices-b | he U.S. 2<br>⊳y-age∕                        | 017, by a | age. http              | s://www.s             | statista.            | com/      |
| orts lea<br>gues-age | gues in t<br>e/                             | he U.S. 2 | 2019, by               | age. http             | os://www.            |           |
|                      | Watch Vi<br>gen-z-and-                      |           |                        |                       |                      |           |
| le. http             | s://teamw                                   | histle.co | om/insigh              | ts/2020/1             | 10/gam               |           |
| wswire N             | ers Shift<br>Iews Room<br>More-Cons<br>ntml | . https:/ | /www.glob              | penewswir             | e.com/               |           |
|                      | ents to g<br>ww.washind                     |           |                        |                       |                      |           |
|                      | y Gen Z &<br>com/artic]                     |           |                        |                       |                      |           |
| tps://ww             | 16). COVI<br>ww.ypulse<br>ing-consur        | .com/arti |                        |                       |                      | uel       |
|                      | ry 28). H<br>′01/28/hov                     |           |                        |                       |                      |           |



