



MOJO AD SPRING 2022 STATE OF THE YAYA

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MEET MOJO AD

TEAM OLIO

MOJO Ad is the premier student-staffed, full-service agency at the University of Missouri. We specialize in 18- to 24-year-olds, also known as the youth and young adult (YAYA) market. No one knows these consumers quite like we do. Why? Because we are them. As members of this elusive demographic, we serve as liaisons between the YAYA market and the professionals seeking to reach them.

To put it frankly, the YAYA demographic can be hard to please. Trends come and go, interests fluctuate and brands tend to have a hard time figuring out how to meet this audience where they are. That's where we come in. As YAYA consumers ourselves, the MOJO Ad staff are passionate about the work we put into our campaigns because they're meant to serve people just like us. Through extensive research and elaborate creative executions, we exhaust all efforts to create a result that benefits both YAYA consumers and industry professionals alike.



WHAT IS STATE OF 3125 Muntle 8

The State of the YAYA is an annual 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-yearand activities of the 18- to 24-vear-

> 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, based on a national quantitative survey of over 700 18- to 24-year-olds, not only highlights who they are as consumers, but individuals as well, by providing a deeper look at attitudes and behaviors toward fashion, identity and selfexpression.

METHOD 0<u>0</u>G

Our 67 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 McKinsey & Co., plus past State of the YAYA reports, to gain a better insight into the evolving YAYA market.

W/HAT

IS A

and what they like.

YAYA?

Originally coined by MOJO Ad,

"YAYA" refers to 18- to 24-year-olds, or

the youth and young adult market. These consumers are at a pivotal life stage in which they are figuring out who they are

At **31 million strong** in the United States

billion, these consumers are choosing

whether to stick with the brands they know or try new ones.1 If marketers fail to

reach them, they might never catch up.

and earning an aggregate income of \$463



Though YAYA individuals are diverse in identity, they are united in the fabric of their demographic. Each and every shade of YAYA is woven together by a common thread – growing up in a rapidly developing economy and online world, yet slowly dwindling climate. At the same time, YAYA consumers are stitching together their identities, both online and in person, through self-expression – from fashion to political activism. Like a pair of blue jeans tailored into a bleached, bedazzled

UNIQUE

purse, YAYA individuals hold the ability to shapeshift in their selfexpression as they change and grow into their identities.

EVERY

We're comparing two alike things – the versatility, durability and resilience of the fabric with the adaptability and individualism of the YAYA demographic in their identities and forms of self-expression. YAYA individuals are *authentic*, *two-toned*, *adaptable and limited edition* in their identities, just like a favorite pair of jeans or thrifted denim jacket.

УДУД.

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State of Denim



TRUTH SEEKERS

YAYA individuals are seeking authenticity and reality

While stitching together the pieces of their identity, YAYA individuals are threaded in their values. YAYA individuals are continuously patching together the personal beliefs that guide their decision-making. Amid an ever-changing physical and online environment, truth-seeking YAYA consumers connect with brands and people that are transparent as they weave together their identities, both as a consumer and an individual.

These consumers are seeking authenticity and reality. Transparency is the expectation. Just as they show up as their authentic selves, they expect the people and brands around them to do the same. Notably, 70% of Gen Z say they like it when online content from beauty brands is not perfect.² In contrast with older generations, 81% of our survey respondents feel that people should

say they like it when online content from beauty brands is not perfect

not have to alter their appearance (covering up tattoos, removing body piercings, etc.) at school, and 71% feel the same about the workplace. Secondary research also reveals that members of the Gen Z demographic said they feel their true identity is suppressed the most while at work.³

To keep up with current fashion and beauty trends and timely happenings, YAYA individuals turn to trusted sources. They seek inspiration from celebrities, Pinterest, their TikTok 'For You Page', TikTok Influencers and Instagram Influencers as well as fashion blogs/magazines. In terms of fashion, beauty and grooming trends, survey





respondents reported they are most likely to seek inspiration from YouTube, with 57% doing so on the video streaming platform. Their trust in social media is evident, as 42% of survey respondents buy clothing from ads on their social media feeds.

YAYA individuals are largely aware of performative activism, which is the support of a cause to gain positive social capital. They are critical of this and expect brands to show genuine devotion in their commitments.



According to our research, YAYA individuals believe the brands they buy from should take a stand on...

Implications for Marketers

Recommendation: Be up front with information regarding business practices, and avoid performative activism.

Brand Example: prAna

prAna is a "sustainable and stylish fashion [brand] for those who live active lifestyles." prAna is focused on making a positive environmental impact while simultaneously preserving human rights and treating animals fairly. prAna's website indicates how the brand is able to meet goals and standards revolving around those socially aware principles.

Recommendation: Show up with content and advertisements in the places that YAYA consumers are looking for inspiration, specifically YouTube, Pinterest, TikTok and Instagram as well as fashion blogs and magazines.

Reflection: Social Media Influencers

Gabrielle DePietro, aka Gibz on TikTok, has 3.1 million followers. With a natural focus on comedy, Gibz posts daily pieces of relatable and authentic content to TikTok. Her content is mainly focused on self love, body positivity and breaking conversational and social taboos directed at women. A personalized playlist titled "Self Love" showcases videos of Gibz where she is transparent about her body and anything she struggles with.





THE BEHAVIOR GAP



The YAYA demographic's actions often contradict their claimed beliefs and values

First and foremost, there is a clear contrast between YAYA individuals wanting sustainability yet buying fast fashion. Fast fashion clothes are made and sold cheaply so consumers can easily replace them. According to Bloomberg, 95% of the clothing sold by Shein, an online retailer of fast fashion, contains new plastics from polyester, nylon, acrylic or elastane. In 2015, polyester production was responsible for 282 billion tons of carbon dioxide, triple the carbon impact of cotton.4

While 70% of our survey respondents claim brand sustainability is an important aspect of their purchasing decisions and 64% want brands to take a stand on climate change, they are still largely contributing to these issues through their actions. In fact, one-third of YAYA consumers typically discard an item of clothing after only one to five uses, and 53% of them feel guilty about it.

Of the 92% of YAYA individuals who shop secondhand...

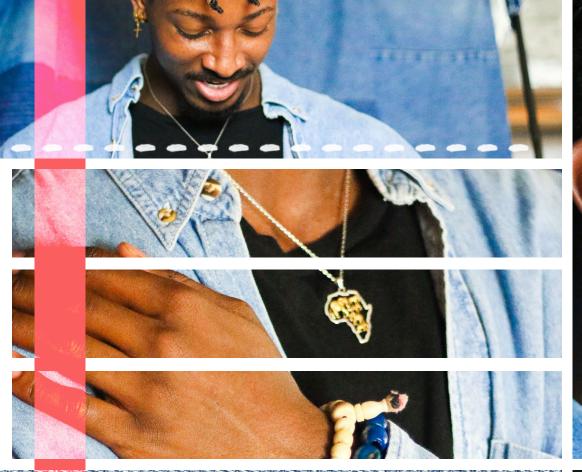
> 32% say they do so to shop more sustainably by reusing instead of buying something new.

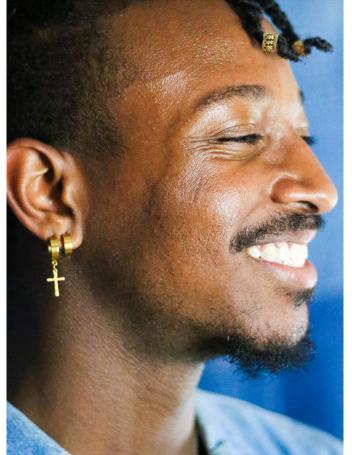
One explanation for the two-tonedness of the YAYA market when it comes to supporting sustainability, yet buying unethically-sourced fashion, may be price. Seventy-three percent of survey respondents listed low prices as important when making purchasing decisions, and another 20% reported they shop secondhand out of necessity.

discard an item of clothing after only one to five uses

YAYA consumers also reportedly value product quality, as 81% listed it as being important when making purchasing decisions. Companies may be able to bridge this gap by offering affordable, ethical fashion or by offering higher quality, slightly less affordable ethical fashion.

There is also clear contrast in the way YAYA individuals follow fashion and beauty trends. Even though 64% of our survey respondents agree being trendy is no longer the trend, 53% still said they keep up with the latest fashion trends. This may be because they interpret trends and personalize them to fit their own style.









of respondents care about creating their own fashion look

Implications for Marketers

Recommendation: Bridge the gap between price and sustainability through affordable, ethical fashion.

Brand Example: Pact

There are many affordable ethical fashion brands today. For example, Pact uses 100% certified organic cotton to ensure high quality garments and crafts its garments in fair-trade certified factories in India. Pact carries clothes for men, women, children and babies. The company has a wide range of sweaters, pajamas, pants and more, with a large selection of clothes under \$50. When you're done with an item from Pact, you can send it back to give to those in need with the company's Give Back Box® program.

Brand Reflection: Depop

Depop is a peer-to-peer e-commerce platform where users buy and sell unique fast fashion. Depop claims to have everything from designer to vintage, for its users. In many ways, it is a reflection of how popular buying secondhand and thrifting has become with YAYA consumers. Since 66% of YAYA individuals care about creating their own fashion look and 70% feel that their clothes are a reflection of their true identity, it is no surprise why they are turning to platforms like Depop for one-of-a-kind pieces. However, there has been polarizing public discourse about sellers buying out thrift stores and reselling items that could benefit those in need. While Depop sellers make a profit, those on a tighter budget do not have the opportunity to find the items for a lower price.

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Two Toned 23



SHAPE SHIFTERS

YAYA individuals adapt to diverse environments while remaining true to themselves

Throughout the lives of YAYA individuals, they are constantly shifting their identities to adapt with the environment they are in. This use of multiple personas is most apparent in the digital world, where 43% of our survey respondents reported creating multiple online identities. The key point is not to define themselves through a stereotype, but rather for individuals to experiment with different ways of being themselves and to shape their individual identities over time. It is an intentional decision by YAYA individuals to curate these personas across environments and communities. In a way, it is an art form.

"To be someone else from time to time"survey respondent on why they have multiple

- survey respondent on why they have multiple social media accounts on the same platform

Similarly, 82% of our survey respondents have multiple social media accounts on the same platform. When asking respondents to select all of the reasons they have for owning multiple accounts on the same social media platform, we found that they do this for a variety of reasons. These reasons include using different accounts for different interests (19%), separating personal and professional life (13%), posting unfiltered thoughts and emotions for select friends to see (11%) and having somewhere to post where they know they won't be judged (10%).





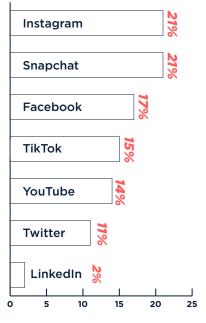
Those in the YAYA market are also shifting personas in the physical world. This is most apparent in their fashion choices. Comfortable clothing, including 'athleisure,' is growing in popularity. In fact, 81% of our survey respondents wear clothes that are comfortable but stylish. Gone are the days of only suits and dresses being acceptable professional wear. Yoga pants and sneakers are now welcome in this environment as companies embrace a more casual workspace.

Every day, YAYA individuals are shifting their identity as they travel through different parts of their day. However, they don't have to switch up their outfit quite as often. They might wear athleisure as they attend class in the morning. Then, when it's time to leave for their afternoon internship, they might leave on their yoga pants but switch out their T-shirt for a sweater. Finally, they can relax in the evening as they spend time with friends and not feel the need to change again.

 810_0 wear clothes that are comfortable but stylish

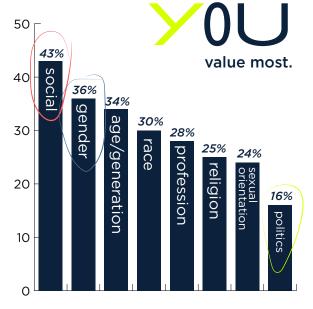
According to Mintel, "comfort and utility are the main focus for many consumers who want clothes and shoes that can go from day to night." As such, 79% of our survey respondents find clothing style important when making purchasing decisions. Furthermore, YAYA consumers do not want brands to group them into one box, as they believe they fit into many boxes.

When asked which aspects of their self-identity they value most, YAYA individuals ranked their social, gender and age/generational identities highest. In contrast, when asked which aspects they think society wants them to value the most, they chose their political, social and racial identities. This helps us better understand how YAYA individuals envision their own identities versus the external pressure they feel about how they *should* identify themselves.

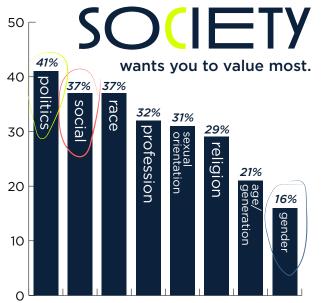


Q. Which social media platform can you be your truest self on?

Q: Select the aspects of your self-identity that



Q: Select the aspects of your self-identity that you think



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Adaptable 29

Q. What is your reason for having

MULTIPLE SOCIAL MEDIA ACCOUNTS

and/or stories on the same platform? (select one)

19% "To use different accounts for different interests"

13% "To separate my personal life from my professional life"

110/0 "To post my unfiltered thoughts and emotions for friends to see"

 10^{0} "To have somewhere to post where I know I won't be judged"

 $10^{0}\!\!/\!\!0$ "To use as a diary that I can look back on in the future"

90/0 "To have somewhere to 'photo dump'"

7 % "To hide parts of my life from my family"



Implications for Marketers -

Recommendation: Offer versatility in products and services.

Brand Example: Public Rec

Comfort is at the heart of all Public Rec products. No brand is more quintessential for athleisure and comfort than Public Rec. Public Rec clothing is versatile in the sense that it can be used to bike to work and then be worn out to the bar that same night. These products are so popular because they shift with YAYA individuals during all their daily activities.

Recommendation: Shift your brand identity to align with the environment, as members of the YAYA demographic often do.

Brand Example: Duolingo on TikTok

Many brands pride themselves on the flexibility of their social media presence. For example, Duolingo is a language-learning website and mobile app that has gained notoriety for its TikTok account. On TikTok, Duolingo has presented a witty and humorous persona while following trends and commenting on many random users' posts. The way in which Duolingo presents itself on TikTok is far from how it treats users of its app, yet the brand still finds a way to remain appropriate on the platform.



GROWING OUT 0F FITTING IN

YAYAs appreciate their individuality and are striving to stand out

To YAYA individuals, there is one opinion, one voice, that has started to really matter – their own. Instead of asking themselves if they are liked by others, they are asking if they like themselves. After many years of striving to be just like everybody else, YAYA individuals are finally starting to appreciate everything that makes them unique.

Among 18- to 24-year olds, there is a clear preference for standing out. Seventy percent of our survey respondents are more interested in crafting their own unique look rather than following fashion trends. When asked about times they felt pressure to fit into society, more than a quarter of survey respondents did not select any of the scenarios listed. Furthermore, 68% of survey respondents reported that they wear clothes to show their individuality, and 59% reported that they wear clothes that help them stand out.

With a focus on themselves and what they want, 18- to 24-year olds are prioritizing comfort and fit while shopping. Eighty-six percent of survey respondents reported clothing wearability and fit as being important, with one-third deeming it extremely important. In regard to brand name, 54% selected important, 10% chose extremely important and 14% found it not important at all. The qualities of a product and the quality of a brand are now the priorities,

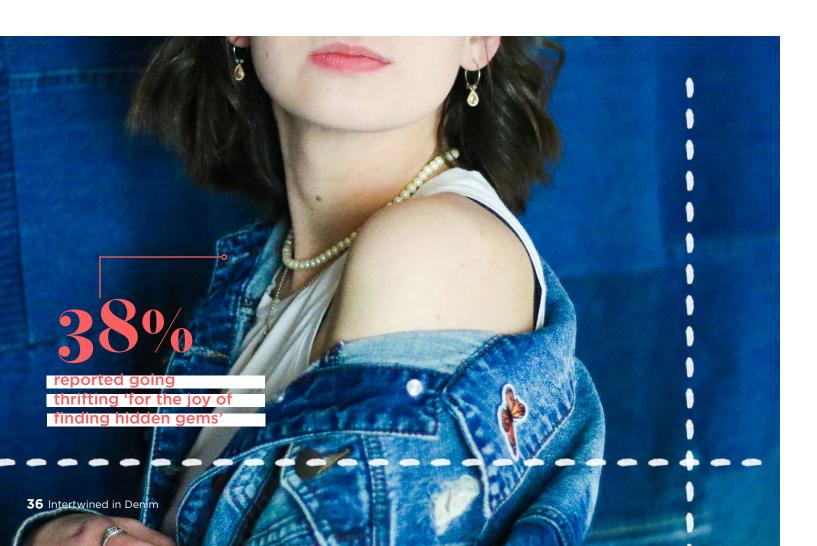


as YAYA consumers have outgrown the standard of buying something exclusively because of what a brand name says about them. According to research by Pinterest, novelty items are more important to Gen Z than brand name. It was reported that Gen Z bought 80% more new products in the last year than their older counterparts.8

YAYA consumers are mainly driven to thrifted items for the ability to curate their own wardrobe with items that are eccentric and fit their ideals of fashion, according to Mintel.⁹ This is supported by our primary research, as 36% of survey respondents selected 'to find unique pieces that nobody else will have' as a reason for secondhand shopping. Additionally, 38% chose thrifting 'for the joy of finding hidden gems.'

YAYA individuals are also growing out of seeking validation from likes and follows. Sixty-nine percent of our survey respondents report not caring about social media likes as much as they did when they were younger. Another 44% say they post whatever they want, whenever they want. Just 28% of survey respondents said they only share the highlights of their lives on social media. That leaves 72% who feel comfortable sharing the authentic, real moments of their lives with their followers.

Over half of our survey respondents purchase items that are stereotypically reserved for a different gender. For example, a female might purchase an oversized hoodie from the men's department because it's roomier and often cheaper. A staggering 69% of women, compared to 45% of men, report doing this. Based on our secondary research findings, 48% of Gen Z say they value brands that don't classify items as male or female.¹⁰



Implications for Marketers

Recommendation: Brands should facilitate YAYA individuals' search for unique self-expression.

Brand Example: Euphoria

Euphoria is a show that has ignited a cultural phenomenon through the self-expression of characters in their fashion and beauty choices. For example, Kat sports bright eyeshadow and 90s-esque outfits, while Cassie experiments with different hairstyles. These characters reflect how YAYA individuals are in a critical stage of life where they are crafting their identities and personal brands.

Recommendation: Gear your marketing language and visuals toward gender neutrality.

Brand Example: One DNA

One DNA is a Black and queer-owned company creating clothing, accessories and jewelry that are made to last and never separated by gender. They offer a large variety of gender-neutral goods.

Reflection: Myra Magdalen (Content Creator)

Unique forms of self-expression are on the rise. One viral TikToker, @myramagdalen, regularly engages in cosplay, which is the practice of dressing up as a character from pop culture. Recently, she designed an outfit based on a stuffed animal lamb and hoof heels. All of her videos feature her bathroom decorated with computer keyboards.

MAI<E IT MINE

YAYA individuals add a personal twist to stand out and show off their true identity

The data suggests that even when following a trend, YAYA individuals claim individuality by customizing specific pieces to make them one-of-a-kind. Our data tells us that fashion is a true form of self-expression, as more than half of those who took the survey use clothing as a way to show their individuality. Additionally, 70% agree that their clothing is a reflection of their true identity. For example, 41% of our survey respondents customize denim by painting, adding patches or dying the fabric.

Owning and/or designing clothing that has a unique style, is rarely found and builds on past trends contributes to consumers' feelings of individuality.11 YAYA consumers also focus on individuality with their clothing because they know themselves, and what they need, better than anyone else does.¹²

> Two-thirds (66%) of respondents care about creating their own unique fashion look

> > More than half (64%) agree that they get creative with their clothing and customize it to match their personal style



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Over 97% of our survey respondents have used at least one of the 11 forms of physical self-expression listed in our survey. They are always experimenting with new looks in order to show off their individuality. According to survey results, the three most popular ways they do this is through clothing (55%), hair styles (43%) and shoes (41%).

When comparing gender, we found that the top three ways men express themselves are through clothing (22%), shoes (19%) and hair styles (15%). For women, the top three ways are clothing (31%), hair styles (25%) and makeup (24%). The data tells us that both men and women place a high value on self-expression with clothing and hairstyles, but a key difference is that women are more likely to express themselves with makeup.

Self-expression is extremely important to this age group, as Medium reports that 73% of those in the YAYA demographic believe they need more self-expression to live a happy, healthy life.¹³ Perhaps this is because when 18- to 24-year olds embrace their authentic selves, their self-esteem rises, making them more fulfilled in other aspects of life. Not only are they experimenting with clothing, but they are also experimenting with makeup and grooming/beauty routines, which 52% and 68% reported to be important to them. respectively. YAYA individuals are also customizing everyday items in the way that they decorate their laptops with stickers, choose phone cases, design Instagram stories and even pick which emojis to use.

YAYA consumers take extreme pride in individuality. They pick and choose parts of a brand that align with parts of their personality, which helps them carefully craft their unique look.

Implications for Marketers

Recommendation: Offer an extensive variety of content, product and service options that can be customized to allow the YAYA demographic to further craft their unique self.

Brand Example: Redbubble

Redbubble is an online marketplace that acts as a facilitator for YAYA shoppers to individualize its products by putting a unique twist on them. This brand assists their YAYA consumers by offering products and templates for them to add their own graphics, colors and textures to otherwise generic products as a way to show off their true identities.

Recommendation: Utilize data to pave the way for personally-curated content, products and services specialized for the personal taste of each user/customer.

Brand Example: Care/of

Care/of is a sustainable wellness brand that is committed to providing its customers with a personalized array of vitamins and supplements. Customers take a quiz that tells the brand about themselves, and the brand sends them supplements that would benefit the customer based on research.

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THE FABRU OF THEIR **DEMO** GRAPHIC

We've unraveled the common thread uniting the YAYA market in the world of fashion, identity and self-expression. In doing so, we've stitched together how YAYA individuals and the fabric of denim are similarly *authentic*, *two-toned*, *adaptable* and *limited* edition.

Though YAYA consumers try on many different identities as they navigate both their physical and online worlds, they are woven into their principles. As truth-seekers, 18- to 24-year olds expect authenticity in the brands and people they invest in. At the same time, as price-driven buyers, their consumption patterns often contradict their claimed values. Depending on the

environment, YAYA individuals shapeshift in their forms of self-expression. While adapting to their ever-changing environments, 18- to 24-year olds are also learning to appreciate their individuality, looking to add a personal twist on trends to display their true identities.

As the YAYA market continues to grow and evolve, capturing their attention will become increasingly imperative. For your brand to stay in style with this dynamic demographic, it's important to look to the attitudes, behaviors and principles of these individuals. Position your brand not just as a fleeting trend they will grow out of, but as a timelessly trustworthy resource that will help them accentuate what makes each and every one of them so uniquely YAYA.



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Conclusion 4

ENTHUSIASTS





BRAD TURNER Account Manager

"My favorite part about my jeans is they can be dressed up or down. I can wear them with a nicer shirt to my job or internship, but I could also wear them to casually hangout with friends or even go on a date. To me, the versatility of denim trumps all."



KATRINA TROY

Art Director

"My wardrobe wouldn't be the same without my staple distressed denim jacket. It's just oversized enough that I can layer it with anything and style with any outfit."



C L A U D I A L E S A G E

Quantitative Strategist

"I'm always wearing my black denim jacket because it goes with everything."

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TRENT TARANTINO

Video Producer

"My favorite piece of denim is a pair of olive green jeans that I can wear hiking or wear casually out."



RACHEL SCHWARTZ

Media Planner

"I have a pair of mom jeans that I wear all the time. They have holes in the front but I can wear them for a night out or just with a casual T-shirt. I love wearing them!"



KIERAN MALLOY

PR Account Manager

"My favorite piece of denim are my vintage Levi 501 jeans because they are comfortable and versatile!"



TESS MURRAY

Qualitative Strategist

"My favorite piece of denim is a dark wash jacket I just recently purchased. It's the first of hopefully many great finds in a wardrobe refresh. It has already traveled with me to Texas and Florida!"



SYDNEY MARINO

Content Manager

"My high-waisted jeans are definitely my go-to... they are the perfect length even for someone who's 5-foot-11."



NICK PAPPAS

Graphic Designer

"I wear my denim jacket with a flannel or puffer inside because I feel like Tom Cruise in Top Gun."



JARED FISCH

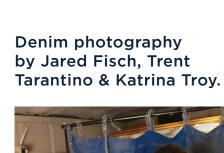
Digital Strategist

"My most frequently used piece of denim is a simple pair of jeans. It's a piece that I can easily dress up for a work event (such as a happy hour) or dress down for a sporting event (such as a Mizzou football game). This pair of jeans is extremely versatile!"



Copywriter

"My absolute favorite piece of denim is my white denim jacket. It was a staple of my mom's during college that she passed down to me. Even though it's missing a few buttons, wearing it always reminds me of her."







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