



CULTIVATING CONTROL

State of the
YAYA

**20
23**

What is MOJO Ad?

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.

YAYA consumers are at a pivotal life stage. 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.

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 demographic to help marketers connect with them on a deeper level. The report not only highlights who they are as consumers, but individuals as well, by providing an extensive look at attitudes and behaviors toward media consumption and their lives online.

Methodology.

Our 60-question survey was distributed nationwide through Qualtrics. This resulted in 814 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.

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Garden of Health.

Health and wellness is constantly evolving and top of mind for YAYA cultivators. With new technology, supplements and, most importantly, mindsets, there are important factors that need to be recognized and understood in order to target this demographic. Previous generations have viewed health as untamable or uncontrollable, as if it were a forest. Now, YAYAs have an overabundance of information at their fingertips. Sixty-nine percent of YAYA consumers see wellness as a vehicle to their overall health.¹

But, what makes YAYAs unique is that they seek out personalized approaches in this area where previous generations have participated in more “one-size-fits-all” methods in their routines.

When cultivating their gardens of health, YAYA consumers take the path less traveled, as 62% of this generation believes that there is no single approach to achieving health and wellness goals.¹ By incorporating habits and products into their daily lives where it already fits, they can achieve these goals at a pace and time comfortable to them.

YAYA Cultivator

noun (yaa • yaa kuhl • tuh • vay • tr)

A person aged 18-to-24 who seeks to garner a sense of control over aspects of their mental and physical health. This is done by tending to and growing a personalized metaphoric garden of health to achieve a positive state of mind.

Seclusions in Spades.

There is a **disconnect** between what YAYA cultivators **want to do** for their “gardens of health” and what they are **actually capable of doing**.

“**C**ultivating Control” is a testament to the want and need YAYAs feel about how they should prioritize and personalize their approach to health and wellness. However, YAYA consumers feel a sense of uncertainty that leads to a lack of motivation to complete certain tasks or goals. Sixty-eight percent of our survey respondents say taking care of their health is a priority in their daily life, while 61% added that what they want to do for their health and wellness and what they actually do are usually different,

showing the disconnection YAYA cultivators face when tending to their “gardens of health.”

This disconnection and confusion may be partially due to the vast opportunities available for YAYA cultivators to curate their health care. While 62% say they are in control of their health and wellness, another 53% report that health and wellness is something they strive for but continue to find unattainable.¹

Fenced in.

YAYA cultivators face barriers, big and small, that keep them from assembling their ideal garden of health and wellness. When given a list to select their largest barriers to achieving their health and wellness goals, respondents reported that anxiety and intimidation (44%), lack of time (43%) and finances (35%) were their greatest obstacles.¹

According to the 2022 State of the YAYA Report, 59% of YAYA consumers agree

that they wake up feeling stressed.² When YAYAs start their days off this way, it can affect their motivation and overall ability to complete other tasks that make them feel present and their best selves. One YAYA individual said: “Last semester, that was a more unhealthy one for me. I think, specifically, I felt so overwhelmed by everything I had on my plate...I avoided things I feel give me joy, like allowing time for myself, whether that’s going for a walk or going to the gym.”

**barriers to health
and wellness goals**

*anxiety/intimidation 44%
lack of time 43%
financials 35%*



“What I want to do for my health and wellness and what I actually do are usually different.”

Forget me, Forget me not.



There is an incredible amount of information out there about health and wellness. YAYA individuals must sift through all these **sources of information** on their own and choose what **works** for them.

The source of the barriers and disconnection that YAYA cultivators experience is deeply rooted in the overabundance of knowledge they have.

All the health and wellness information streaming into YAYAs' social media feeds has caused 55% of them to feel overwhelmed by the amount of health-related information available.¹ The process of deciphering which sources are reliable and trustworthy is not an easy task for YAYAs, especially when sources are an overload of contrasting information.

“ Sometimes I worry we're too informed ... having this health and wellness sphere on social media makes us more like, 'Oh my God, I didn't drink enough water today.' **”**

62% “overwhelmed by amount health-related information available to me.”¹

Superbloom.

Among the YAYA demographic, 71% agree that the way they define health and wellness is different from older generations.¹ These definitions often come from information found online, although not all online sources are trusted. In our survey, 58% of respondents believe social media is the most untrustworthy source for health information.¹ With some YAYAs believing that social media trends relating to health and wellness are seen as potentially dangerous and toxic, there is immense pressure to achieve “success” at such a young age. The

constant reminder to perfect a routine on social media is one of the many reasons this group may define themselves differently than their parents' generation, which was not bogged down in an overload of information. Instead, 73% are putting their trust in their parents when making health and wellness decisions.¹ Additionally, 74% of the survey respondents said they trust medical professionals, but 55% also said they avoid going to the doctor if they can.¹

YAYAs are like **supercomputers** sifting through health and wellness information. They **weed out** sources that they don't trust, resulting in a perfectly customized set of information and approaches that are **unique** to them.





Water your Garden.

Sorting through all of this information leaves YAYA cultivators **disconnected** from their **ideal** health and wellness and left with their **realities**.



BRAND SPOTLIGHT: Whoop

Whoop is one brand helping YAYAs reach these goals through a wearable technology device that tracks users' recovery, sleep, training and health. This data informs personalized health coaching sessions and recommendations to achieve personal health and wellness goals.

This group of consumers is constantly experimenting with their routines to find what works for each of them individually. According to research conducted by Mintel, "41% of adults aged 18-24 have added a new step to their routine... showing overall that younger consumers over-index in engagement of their routines compared to their older counterparts."³

Brands can bridge the gap for YAYA cultivators by making it easier for them to achieve their health and wellness goals. Employers can help YAYAs by incorporating productivity-boosting breaks throughout the workday or providing employee benefits such as discounted gym memberships, apps and technology or products to help them achieve their mental and physical health goals.

BRAND SPOTLIGHT: Switch

Another brand working in this area is Switch, a science-backed journal that supports mental and emotional health through daily 10-minute guided reflections allowing journalers to build better self-relationships. Each journal has a different focus which allows a more personalized self-care journey.



want to do

- diet and nutrition 48%
- meditation 48%
- Yoga 45%
- manifestation 43%

actually do

- journaling 37%
- working out 42%
- diet and nutrition 37%

YAYA individuals are partially relating their struggles in **mental health** and **anxiety** to the unknowns of a rapidly advancing health care industry. Their trust in **prescriptions** and **pills** is **waning**.

In the past, traditional remedies such as pharmaceuticals have been the universal approach to solving mental and physical health-related problems. However, 51% of survey respondents said that they are tired of taking pills, showing that YAYA consumers are actively looking for alternative products to take care of their well-being.¹ While some YAYAs are prescribed a plethora of daily pills, others are taking nothing, creating a sense of disarray among peers and distrust with the health care industry. As homeopathic and natural alternatives continue to evolve and gain momentum, YAYAs are open to trying these products due to the inaccessibility, price and lack of trust in traditional medicine.

51%
tired of taking pills

Deseed.



Conservatory.

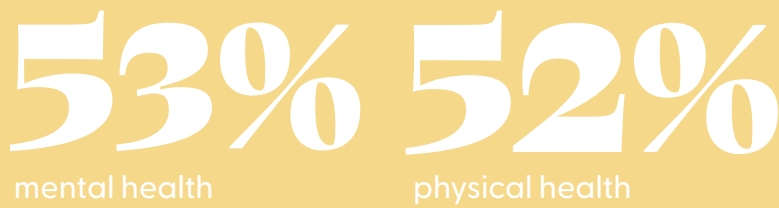
YAYA cultivators see wellness as a **vehicle** to their health, so they strive to take care of their **mental and physical health** simultaneously – **they are one and the same.**

YAYA consumers are eager to incorporate health-minded practices into their routines because they see nontraditional benefits that improve multiple areas of their day-to-day lives. They view the inclusion of these practices as bringing aspects of positivity and joy into their lives. Similarly, they incorporate working out into their routines for self-care (25%), to cope with stress (22%) and to move their

bodies rather than being fit (54%).¹ Working out does not necessarily mean hitting the weight room or running for endless miles on a treadmill. YAYAs are more concerned with how their body feels than how they look (57%), showing this demographic's prioritization of self-care in their daily routines.¹ And once individuals in the YAYA age group figure out their preferred method of working out, they feel motivated and their best, mentally and physically.

“ *I schedule out certain times... in my day where I will not be working or doing school and will do something for myself ... that brings a bit of positivity and joy into my life.*

Respondents take care of their health to improve ...



Rinds, Peels & Tops.



most important when
deciding what to eat or drink:

47%

hydration

42%

energy boosting

35%

calming/relaxing

YAYAs are tired of worrying about all the potentially negative effects of “one-size-fits-all” solutions on their health, so they are paying attention to **individual ingredients** and the effects they have on their daily lives while also prioritizing **instant gratification**.

This turn away from traditional medications has led to an increase in YAYA cultivators seeking out and using natural remedies to improve their health (55%).¹ Conventional solutions and less customized approaches, such as taking pills and pharmaceuticals, have a laundry list of negative side effects, which is worrisome to YAYA consumers.

Products that offer benefits, such as functional or clean ingredients, excite YAYA cultivators as they look for products that fit seamlessly into their busy days, improving their overall health and

making them feel good about themselves holistically. As YAYAs turn their attention to individual ingredients in food and drink products, they are noticing the effects these products have on their daily lives. When choosing what to eat or drink, our survey respondents said that hydration (47%), energy boosting (42%) and calming or relaxing effects (35%) were the most important benefits they look for.¹ From the time they wake up and throughout their day, YAYAs turn to caffeinated beverages to give them optimal energy. However, when it is time to go to sleep, YAYA cultivators want the instant gratification of calming products such as cannabis, supplements or food and drinks to put them back to sleep.

Seeds of Life.



C/O

BRAND SPOTLIGHT: Care/of
Daily personalized supplements delivered to your door. Ranges from mental and physical health to multivitamins and gut health.

Because YAYA individuals find it difficult to get all their **daily nutrients**, they are building healthier diets by **finding alternatives** to get everything they need to grow.

The use of supplements is on the rise for those in this age group with 71% saying that it is important to add nutrients into their diets.¹ Brands such as Care/of, Ro and O Positiv offer daily supplements, a specialized approach to achieving a healthy lifestyle that resonates with YAYAs. By prioritizing the personalization of their products and services, YAYA cultivators are able to find what works best for them in the form that they desire.

As YAYAs look for a variety of benefits from their health and wellness regimes, marketers should adopt a customized perspective by creating products and brand initiatives that are not a “one-size-fits-all” approach.

Care/of is a personalized vitamin and supplement subscription service. Customers take a quiz filled with questions about their lifestyle, habits and health goals

to curate the perfect daily supplement pack. Care/of makes it easy for people to add supplements into their routines with their app that sends reminders and tracks progress over time so users feel informed and their best.

YAYA individuals prefer taking supplements in gummy form (29%) or naturally as part of their diet (27%), opposed to the traditional capsule or pill.¹

61%

“supplements give me a sense of control”

Dry Bloom.

YAYA cultivators are moving **away from alcohol** and **toward natural substances**.

YAYA cultivators have consistently been planting new additions into their health and wellness gardens and some have decided to uproot others that don't provide any benefits, such as alcohol. The sober-curious movement has been a driving force of change with well over half of our respondents stating that being present or in the moment affects their overall health and wellness (68%).¹ Given this finding, it's no surprise that 62% said they would choose a non-alcoholic beverage in social settings if it's available.¹ Additionally, 55% of our survey respondents stated they would participate in a period of prolonged sobriety such as "Dry January."

62%

will choose a non-alcoholic beverage if it is available

As YAYA cultivators are shifting away from alcohol, or even participating in prolonged periods of sobriety, there is a need for tasty and healthy drink alternatives with functional ingredients. Employers should take into account non-alcoholic options when hosting events

such as work happy hours or holiday parties, or regularly have a variety of products available in the office. Marketers could also look to position themselves in the mocktail business while prioritizing natural and nurturing ingredients.

BRAND SPOTLIGHT: Olipop

Olipop is a new type of soda that kicks traditional sugary pops and alcoholic beverages to the curb.

Filled with probiotics and plant-based ingredients, Olipop is the perfect balance of sweet and healthy to help consumers feel their best and fuel their bodies.





A weed is but an unloved flower.

Even natural substances like **cannabis** are starting to look more appealing as **alternatives** for cultivating health and wellness for YAYA individuals.

YAYA consumers are seeking out alternatives for a wide range of products to achieve their health and wellness goals. With recreational cannabis being legal in 21 states across the country, it's not surprising that 22% of our survey respondents report using cannabis products for recreational purposes.¹ Additionally, YAYAs are using cannabis products as a tool to cope with stress (15%), for their physical health (35%) or for their mental health (35%).¹

This idea fits with the fact that 51% of our survey respondents agreed that

if a substance helps them and how they live their lives, it doesn't matter how it affects other people's lives.¹

With a decreased stigma toward the cannabis industry, marketers should look to invest in cannabis alternative products, such as CBD-infused drinks, that serve different yet important purposes for YAYA cultivators and meet them where they are as consumers. Employers should consider the repercussions of implementing mandatory drug testing and heavily consider the health benefits cannabis provides for those who choose to use it.

63% of YAYAs use cannabis

35% use cannabis for **physical** and **mental health**



22% use cannabis for **recreation**



BRAND SPOTLIGHT: Kiva Confections

Kiva Confections is a premium cannabis company that produces a wide array of products from gummies to chocolate bars and mints that allow users to pick their "vibe." To relax after a long day to a social night out or a good night's sleep, Kiva has specialized edibles to suit your personal needs.



49%
of respondents struggle
with stomach/gut issues

66% of respondents “just want to feel OK” so they
can make the most of present experiences

YAYA cultivators’ approach to holistic health has evolved as product offerings, information and societal norms have progressed along with them. Personalized approaches appeal to YAYA individuals because when they are forced to conform to people or products, they are unsatisfied and unhappy. In order to overcome this and achieve a positive state of mind, YAYAs try to live in the moment, rather than worry about future issues.

This positive state of mind that YAYA cultivators so desperately want to achieve is not an easy undertaking, since there is no single

correct path to take. Sixty-six percent of survey respondents reported that in order to feel OK, they make the most of their present experiences when it comes to health and wellness.¹ Barriers to achieving a positive state of mind may come from a lack of sleep or gut health issues, which 64% and 49% of our respondents stated they deal with, respectively.¹ To overcome these issues, YAYAs are turning to personalized products and services. In the 2021 State of the YAYA report survey, 68% of respondents said they would rather purchase a product unique to them rather than a luxury product.⁴ In addition, they are trying to prioritize sleep to aid their health.

BRAND SPOTLIGHT: BelliWelli

BelliWelli is a snack bar filled with probiotics to help YAYAs feel their best without taking pills. BelliWelli is a delicious yet healthy treat to fuel gut microbiomes with the power of probiotics and clean ingredients. This bar is an easy addition to someone’s day and comes in an array of flavors ranging from chocolate chip cookie and birthday cake to blueberry muffin.



Tending to Terrors.

YAYA cultivators face many **stressors** and **anxieties** which are leading to many different issues in their individualized health and wellness. By **tending** to their “gardens of health,” they feel they can achieve a positive state of mind through **personalization**.

64%
struggle to get enough sleep





Garden of Health.

Every individual's garden is curated to their specific needs and routines. Cultivation of these concepts gives the ability for YAYA individuals to take back control of their environments. This allows them to feel their best mentally and physically, which is essential to being satisfied with their overall health.

As YAYAs push back against how the overconsumption of information affects them daily, they have chosen to pick the substances and

ingredients that benefit their ever-changing needs. From gummy vitamins and energizing drinks to manifesting and working out, YAYAs have started to plant their own seeds of change in the health and wellness industry, paving the path of personalization to reach their ideal state of mind.

For the YAYA audience, Cultivating Control is just the start. Through this research, we've uncovered some of the elements that help YAYAs bloom.



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Thank you.

Team Syzygy would like to extend a special thank you to all of our models and supporters including Strawberry Hill Farms and Kent's Floral Gallery. Your kindness and generosity allowed our project to flourish.

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