

STANDING OVATION



2023 STATE OF THE YAYA

PROLOGUE: **MOJO AD**

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

WHAT IS A YAYA?

Originally coined by MOJO Ad, “YAYA” refers to 18- to 24- year-olds. These consumers are at a pivotal life stage in which they are developing their identities and embracing their reality.

At 31 million strong in the United States, 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 THE 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. This report not only highlights who they are as consumers, but individuals as well, by providing a deeper look at attitudes and behaviors toward pop culture, technology, identity and self-expression.

METHODOLOGY

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



OVERTURE: **THE CONCEPT**

The spotlight has connections to theater, cinema and celebrity culture, with the phrase “in the spotlight” meaning to be the center of attention. Today, with social media and internet fame, anyone can be under the gaze of the spotlight, and everyone can assume the role of “main character.” Team AURA acts as the stagehands, directing the spotlight and bringing to the surface components of youth culture, such as their use of social platforms and global media to find community and expression.

Culture is an ongoing and lifelong performance, played upon the stage of social media, where YAYA front-stage personas are internet identities that serve as extensions of their backstage selves. Our

research into youth and young adult attitudes and behaviors toward culture and entertainment revealed that YAYA consumers step into their own spotlight and use it to share the limelight with others. Here, stories are determined on stage under the watchful eyes of the audience and little is able to be left in the dark. After sifting through countless internet niches and cores, YAYAs audition new identities and find connection with others on center stage. Here, YAYAs navigate the ways in which creative expression, artificial intelligence, parasocial relationships and internet niches play a role in their lives.

Introducing “Standing Ovation,” a comprehensive report written by YAYAs about YAYAs.

TABLE OF CONTENTS



ACT I:
**THE EXPRESSIVE
ESCAPE**
(p. 6-9)

ACT III:
**THE INNOVATION
INTERSECTION**
(p. 16-17)

ACT II:
**THE PARASOCIAL
PARADOX**
(p. 10-15)

ACT IV:
**THE COMMUNITY
CATALYST**
(p. 18-23)

ACT I:

THE EXPRESSIVE ESCAPE



The scene opens on YAYAs in search of an expressive escape. Through this journey, they turn to creativity as a way to take control of their time and identity. Since the pandemic, YAYAs are seeking to learn new skills, as they crave cathartic creative experiences.

FINDING INSPIRATION

The collective need for creative outlets bonds YAYAs to their identities while strengthening community connections, as 60% of YAYAs say creativity helps connect them to others. According to our survey results, the top five creative activities YAYAs immerse themselves in are painting, drawing, doodling, playing video games and cooking or baking. Sometimes, YAYAs need a new muse, as 66% look for different ways to express their creativity and 70% of them turn to social media to find those acts of inspiration.

While social media may provide inspiration, it also has its downsides. We found that 55% of YAYA respondents feel the pressure to make their lives more interesting, with younger YAYAs (ages 18-21)

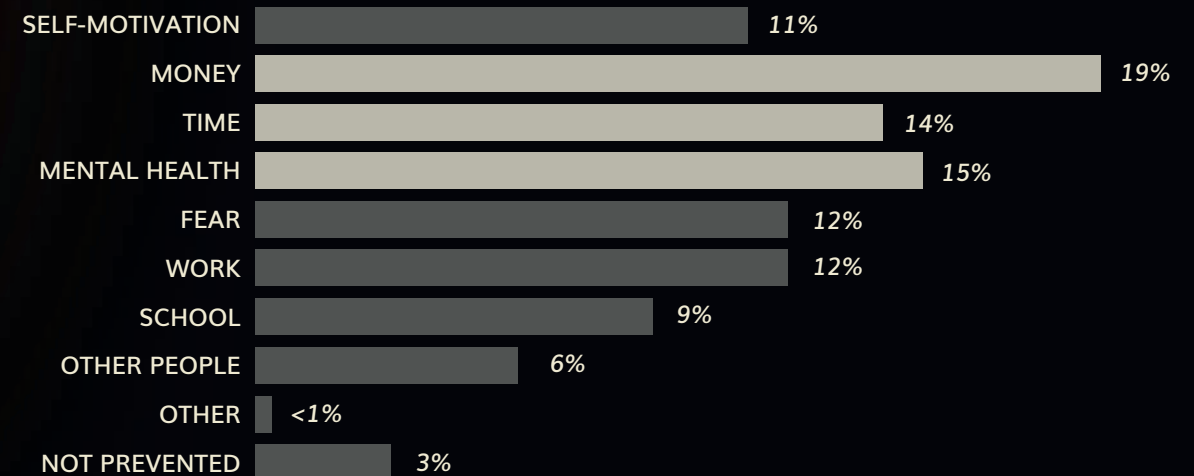
being 5% more susceptible to this social pressure. Social media illuminates this fact, as 57% of YAYAs feel like they are behind in life compared to the people they see on social media and 51% feel anxiety when comparing themselves to influencers. In turn, a majority of YAYAs say they feel like they need to spend money to keep up with their peers.

BARRIERS FOR CREATIVITY

As YAYAs strive to reach their full potential, their top three barriers are money, mental health and time.

YAYAs want to take control of their lives by balancing their responsibilities with things that bring them joy and fulfillment. They use creativity as a way to “own” control over their everyday lives through self-expression, solving problems and sharing their passions with others. This helps them feel independent and inspired.

SELECT ALL THAT APPLY: *Barriers that prevent me from living in the moment include...*



IMPLICATIONS

Marketers should provide ways for YAYAs to make products and experiences of their own by showing off brands as extensions of their own creative expression.

A hypothetical product we have created that provides the necessary features to help YAYAs regain a sense of autonomy is Doodle Drink. Hydroflask, a popular water bottle brand among YAYAs, releases a customizable water bottle paired with paint pens. YAYA consumers would be encouraged to post their original works online with #DoodleDrink to naturally join a community full of artists. This not only would draw creative YAYAs together, but also produce earned media and user-generated content for Hydroflask to organically showcase the product.

By capitalizing on this need for creativity, marketers can foster a community of collaboration and not competition. Brands can create opportunities for YAYAs to show off the brand as an extension of their own creative taste with customizable products and inspirational content. This gives YAYAs a sense of confidence in their ability to generate new ideas or problem-solve, leading to an opportunity for greater purpose. In turn, YAYAs will feel supported knowing that while they may be living different lives than the people they see on social media, they each have the ability to steal the show.

THE MARKETER:

*[Encourages creativity
and expression via
#DoodleDrink.]*

THE YAYA:

“Being creative is more about generating something of my own and not feeling like I’m just going through the motions, taking a step back from feeling like I’m on autopilot.”



ACT II:

THE PARASOCIAL PARADOX



*40%
of YAYAs are
consuming
content from
influencers
that annoy them*

Although YAYAs construct their individual identities through creative expression, they also pursue relationships with online creators. They love to hate as much as they love befriending their favorite influencers. This leads us into our second act, the Parasocial Paradox.

In Act Two, we see YAYAs performing the parasocial paradox, a phenomenon where YAYAs love to hate celebrities and influencers. YAYAs are more interested and comfortable with celebrities than previous generations. They are fixated with one or more celebrities at 12 times the rate of their parents' generation.¹ They consume an extensive assortment of content, enabling them to see through any inauthentic brand partnerships. YAYAs seek authenticity and are not afraid to denounce those who don't live up to their standards. However, YAYAs often find this connection through influencers who have a small to midsize following. They believe those with less influence are more trustworthy and easier to relate to.²



Despite loving to hate-watch, YAYAs still aspire to play the role of influencer. As culture and entertainment develop, the line between an influencer, celebrity and the average YAYA blurs. YAYAs have shown that almost everyone is equipped with all the tools to rise to fame. However, they are forced to confront the reality: is fame worth the potential for hate?

HATE WATCHING

{Hate Watching: The activity of watching content with the intention of acquiring amusement from the mockery of its subject.}

YAYAs enjoy watching others in the spotlight, even when it is so bad they cannot look away. As a form of entertainment, 38% of YAYAs hate watch influencer content while 40% consume content that intentionally annoys them. Hate watching is a shared interest between YAYAs with 42% of respondents stating they bond with others over their dislike for influencers. Our data showed that 12% more YAYA men watched this intentionally triggering content compared to women.

DROPPING THE SCRIPT

Authenticity plays a significant role in the relationship between YAYAs and their favorite influencers/celebrities. Despite being self-proclaimed haters, many YAYAs view influencers and celebrities as relatable individuals who experience similar struggles and triumphs as themselves. This perception is reinforced as 52% of YAYAs value when influencers and celebrities reveal their messy and imperfect sides. On the other hand, YAYAs tend to feel annoyed when influencers try to portray a picture-perfect life, which can come across as disingenuous. Among YAYA respondents, 47% admitted to being drawn to influencer gossip.

YAYAs are also drawn to the behind-the-scenes drama of their favorite influencers and celebrities. Among YAYA respondents, 47% admitted to being drawn to influencer gossip, suggesting that the consumption of this media blurs the lines between content viewers and content creators. This consumption of media leads to a break in the

fourth wall between content creators and viewers, creating a sense of intimacy and familiarity between the two.

In the pursuit of authenticity, YAYAs pride themselves in seeing through the smoke and mirrors, as 64% of YAYA respondents believe that influencer posts are scripted. YAYAs tend to skip over ads and inauthentic reviews, as they are easily able to discern between genuine content and marketing tactics. However, if a celebrity or influencer is shown using a product in a video, YAYAs are more likely to continue watching promotional content.

Although some influencers strive to be genuine and unfiltered, they must still tread carefully to avoid being #Canceled. Despite this risk, survey results indicate that even when an influencer faces public scrutiny or backlash, 51% of YAYAs still continue to consume their content.

THE YAYA: *“I can easily tell when somebody’s being fake and if something’s blatantly scripted. The scripted stuff makes me think that they are being so fake. It’s not who they really are.”*

IN REGARD TO MY FAVORITE CELEBRITY, I FEEL THAT... (in order of presentation)

We would be good friends	59%
I know them pretty well	53%
I feel comfortable with them	57%
I have a good idea of who they are as a person	52%
I see elements of myself in them	58%
They inspire me	72%

IN REGARD TO MY FAVORITE CELEBRITY, I FEEL THAT... (in order of presentation)

We would be good friends	59%
I know them pretty well	55%
I feel comfortable with them	58%
I have a good idea of who they are as a person	52%
I see elements of myself in them	57%
They inspire me	67%





IMPLICATIONS

Marketers should embrace having celebrities and influencers speak candidly and encourage them to share the good, the bad and the ugly. Marketers should know when YAYAs see #Sponsored, they immediately scroll to the next post unless the product fits into the normal content of the creator. To combat this rising skepticism, marketers should encourage influencers to go off-script to strengthen the parasocial bond. It is vital that marketers emphasize transparency and de-influencing by leveraging specificity with products and services instead using blanket statements.

THE MARKETER:

[Creates genuine connections between brands and The Influencer or faces the tomatoes.]

{De-influencing: When content creators encourage viewers to reject certain purchases — currently trending on TikTok as a sign of growing backlash to overconsumption.}

Through conveying the authenticity YAYAs crave, marketers can avoid situations such as “mascara gate” — a TikTok mascara brand deal where fans caught beauty influencer Mikayla Nogueira using false lashes while promoting L’oreal mascara. In a sponsored TikTok post, where she did not explicitly say she was being paid by the brand, Nogueira applied the L’oreal mascara.⁴ The video then cut to her lashes, which were unbelievably long. She claimed that it was the effects of the mascara. However, her fans were quick to call out the beauty guru for using false lashes in the last clip and not revealing that fact to her viewers. Instead of lying to viewers, influencers should be honest about their experience with the product and accept that not every product is perfect for every consumer.



ACT III:

THE INNOVATION INTERSECTION

Act Three examines YAYAs' exploratory nature and places them on the frontier of uncharted territory — the world of artificial intelligence.

As digital natives, YAYAs have seen every aspect of social media and technology, making them skeptical about how the future will play out. When it comes to general attitudes, 61% of YAYAs are open to using AI. However, 59% said they are still skeptical of the new technology with men remaining more suspicious.

Regarding how AI will affect YAYAs' lives, 55% of YAYA respondents are concerned that AI will eliminate jobs for their generation, while 50% think it is ethical to use AI for a school assignment. So, while YAYAs see how AI can help them through their education, they are worried AI might replace the job they are ultimately preparing for.

Despite the uncertainty, YAYAs often interact with AI and AR unknowingly through things they depend on, with 19% of respondents reporting to have used filters, effects on social media and personalized content recommendations. However, when it comes to virtual try-on technology, 4% of respondents stated they use the tool.

YAYAs see the convenience in these technologies but are wary that artificial intelligence will become the star of the show, eventually making humans obsolete.

IMPLICATIONS

Marketers should emphasize AI's benefits without using it to replace traditionally human roles. YAYAs' anxiety around AI could provoke negative feelings toward a brand if used in an irresponsible way. Marketers should also prioritize ethical boundaries when using AI as YAYAs feel that originality is a uniquely human capability that AI can't replace.

Snapchat[®] is an example of a brand that missed the mark with YAYAs by creating an AI chatbot, positioning it as an “unreal best friend.” YAYAs felt Snapchat was trying to replace human interaction, turning them away from using that feature.

On the flip side, YAYAs value when AI benefits their personal development. The launch of Duolingo MAX, which uses AI to mimic real interactions in foreign languages, was praised by YAYAs, as it helped users develop their speaking skills through artificial conversations.

When creating AI-generated content, marketers should be transparent in their messaging about intent and operation. This is a key factor in gaining the trust of YAYAs when messaging about AI.

THE YAYA: *“A big difference between AI and human stuff is originality because AI is just pulling information from everywhere. It lacks creative inspiration.”*

THE MARKETER: *[Is transparent about their intent and operation of AI-generated content.]*



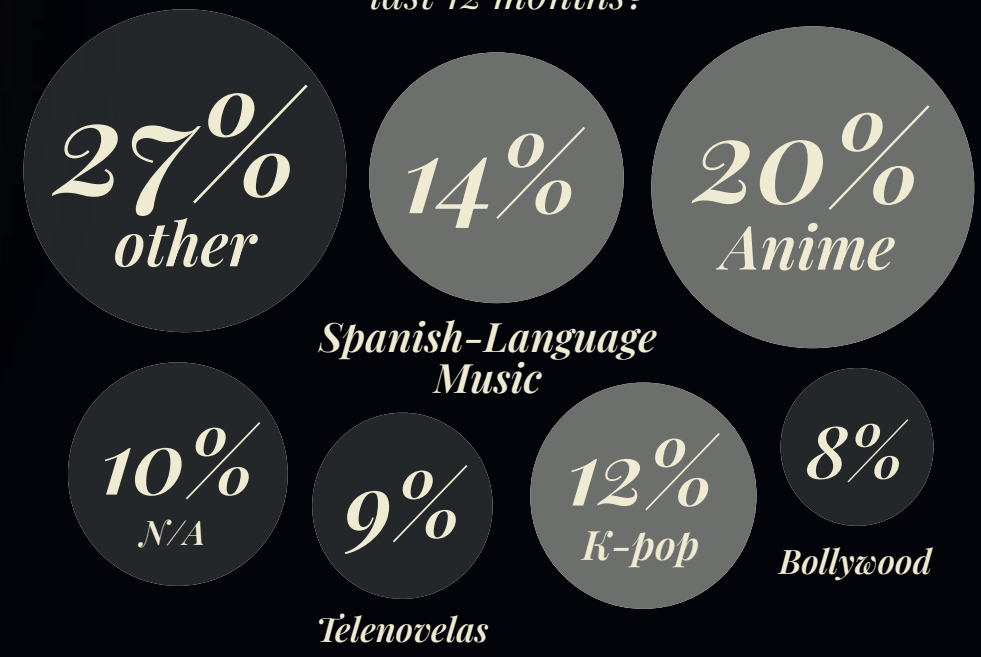
ACT IV:

THE COMMUNITY CATALYST

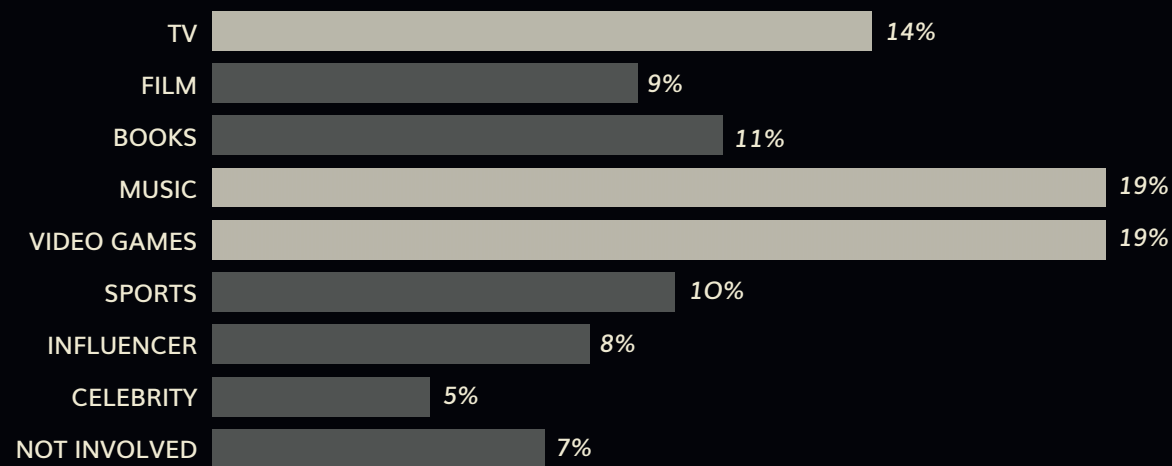
In Act Four, our final act, we open on the YAYAs sharing the stage with others. YAYAs crave their main character moments. They are independent and individualistic, but they often seek a cast or community to be a part of. Social media, entertainment and gaming offer YAYAs a safe space where they can connect with others and create relationships in both real and digital worlds.

On social media, they craft their cores and appearances while interpreting those of others. They scroll through the comment sections looking for others whose interests and views align with their own. This curated content validates their opinions or fuels their in-person conversations with friends. Regardless of where these conversations take place, YAYAs' opinions are always alongside an audience of their peers.

SELECT ALL THAT APPLY: *Which of these pieces of foreign media have you consumed in the last 12 months?*



SELECT ALL THAT APPLY: Which of the following internet communities are you a part of?



INTERNET NICHEs & CORES

{Core: A group of dedicated consumers who regularly engage with a particular account, brand or aesthetic.}

Developing an individual identity that they can let shine within a group is everything to YAYAs as once they find themselves, they can find their community. YAYAs' need for connection shines online as 46% say they identify with a specific internet community, with the top three communities being related to music, video games and TV. Only 7% of YAYA respondents reported that they are not a part of any internet community.

YAYAs are drawn to these groups with 16% stating they inspire creativity and connect them to others while 14% report they are a way for them to express themselves. For some, that can manifest into the curation of an online niche or core as 55% of YAYA respondents say they actively think of their aesthetic on social media and use their social media appearance as a means of expression.

GAMING

In the world of online gaming, a majority of YAYAs use gaming for various purposes as 73% play to escape, 73% for entertainment and 71% game to relieve stress. Aside from fun, nearly half of male respondents want to game for a living. YAYAs also utilize multiplayer gaming to virtually interact with others while cultivating individual expression through character customization and development of their own unique strategies. Gaming is not only an act of expression but also establishes a sense of self: 65% of men and 45% of women say playing video games is part of their identity.

FOREIGN MEDIA CONTENT

Whether it's aesthetic cores or gaming, geographic borders have become irrelevant as YAYAs find ways to connect globally. Along with providing more diverse communities, it's also driven a rise in YAYA consumption of foreign content. Our survey data showed that 59% of YAYAs are interested in foreign films, shows and music and use that as a shared interest between them and their friends. The top types of foreign media content include anime (20%), Spanish-language music (14%), and K-pop (12%).

THE YAYA:

"There is so much information and different perspectives in the world that I wouldn't have known about unless I saw it on TikTok."



THE MARKETER: *[Connects to YAYAs in organic forums by tapping into their niche interests.]*



INTENDED USE BY PLATFORM

YAYAs are drawn to carefully curated content that aligns with their interests, despite being aware of potential confirmation bias perpetuated by the algorithms on social media platforms. While TikTok and Twitter are perceived as more educational platforms, YAYAs still exercise their own judgment to determine the validity of the content they consume.

The utilization of social media for educational purposes serves as a conversational asset for YAYAs, both online and offline, allowing them to broaden their horizons and gain exposure to diverse viewpoints. Whether they are trying to learn something new or looking to enjoy entertaining content to burn time between commitments, YAYAs have the option to decide which aspect of social media they want to engage with based on their needs.

IMPLICATIONS

Marketers should focus on how YAYAs link their sense of identity and community with various pop culture pieces. Brands that legitimize the unique aspects of niche communities on a wider audience scale will connect to various YAYA identities. Marketers should provide YAYAs interactive ways to engage with these interests and shape their identity both digitally and in-person.

YAYAs turn to the comment section to validate their own opinions and connect with others. Therefore, marketers should use spaces outside of their owned content to build relationships with consumers engaging with pop culture.

Marketers should also leverage unique collaborations placed with foreign media content as a way to link different niche groups together. A prime example of this is *Naruto* which collaborated with Air Jordan to mesh the anime and basketball communities. This new line of shoes blends seamlessly with NBA star Zion Williamson's interest in anime and was a slam dunk for YAYAs.⁶



EPILOGUE:

THE SUMMARY

In conclusion, the youth and young adult demographic has a complex and multifaceted relationship with culture and entertainment. They are avid consumers of digital media and highly engaged with influencer and celebrity culture. YAYAs value authenticity and relatability in their content, but are also drawn to the drama and behind-the-scenes aspects of their favorite personalities. As influencers continue to shape

the landscape of popular culture, it is clear that YAYAs will play a significant role in defining and shaping the future of the entertainment industry. Understanding this generation and their evolving relationship with culture and entertainment will be essential for businesses, brands and content creators seeking to engage and resonate with this highly influential demographic.



[THE END.]



CURTAIN CALL: **TEAM AURA**

We are Team AURA. A team of hardworking, grounded individuals. We utilize our multifarious talents to create an intuitive vision that projects a powerful message. We are bold and provocative. We plan with confidence and create with purpose. We embody a wide array of traits that make us one. We are unique, ambitious and innovative. We are Aura.

ACCOUNT MANAGER	Lily Williams
ART DIRECTOR	Samantha Novak
CONTENT MANAGER	Bella Hatzigeorgiou
COPYWRITER	Delaney Ehrhardt
DIGITAL STRATEGIST	Daniel Napolitan
GRAPHIC DESIGNER	Sammy Johnson
MEDIA PLANNER	Abby Kimball
PR ACCOUNT MANAGER	Sophie Walding
QUALITATIVE STRATEGIST	Olivia Haffner
QUANTITATIVE STRATEGIST	Evanna Momtaj
VIDEO PRODUCER	Anna Buturla

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SPECIAL THANKS

Team AURA would like to thank Caitlin, Danielle, Ellie, Garrett, Gehazi, Harry, Jasmine and Jack for helping Standing Ovation come to life over the last semester.



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