

STATE OF THE YAYA

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STATE OF THE YAYA REPORT + LIVE WEBCAST

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NEWS_CITIZENSHIP_SOCIAL RESPONSIBILITY

2020



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MOJO AD

MOJO Ad is a student-staffed, full-service agency at the Missouri School of Journalism. We are specialists in all things young, specifically 18- to 24-year-olds. We call them

the Youth and Young Adult (YAYA™) market.

This market is complex, ever-changing and elusive. Fortunately, we are a part of

the YAYA market. We post, share and discuss things with them. We see them for who they truly are.

STATE OF THE YAYA

The State of the YAYA is an annual, in-depth report compiled and written by MOJO Ad staff. The report is based on our national quantitative study of 700+ 18- to 24-year-olds. Each year, we help marketers understand and connect with YAYA consumers and their world. This report not only sheds light on who they are, it highlights their attitudes and

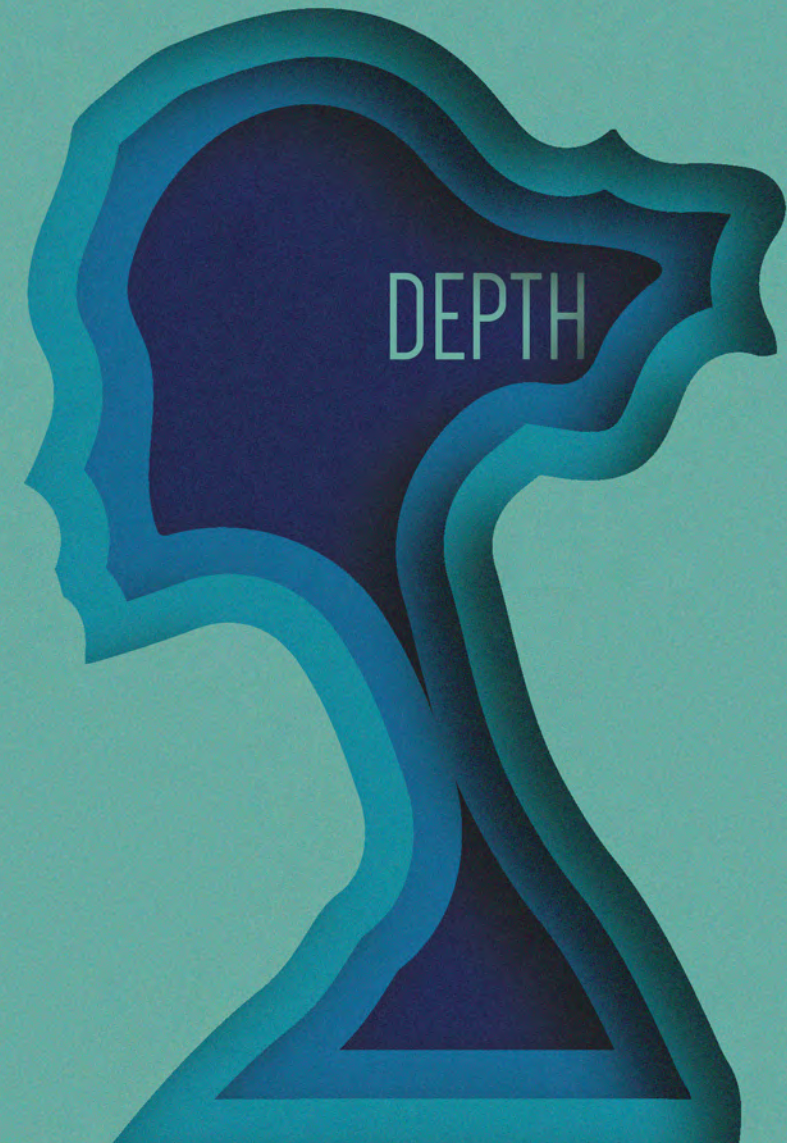
behaviors on everything from mental health in the workplace to political issues and media consumption.

YAYA individuals are in a pivotal life stage. They are 31 million strong in the United States and generate an aggregate income of \$463 billion.¹ They are about to decide whether to stick with the brands they have used their

entire lives or try something new. If marketers fail to look beyond initial perceptions, they could lose them forever.

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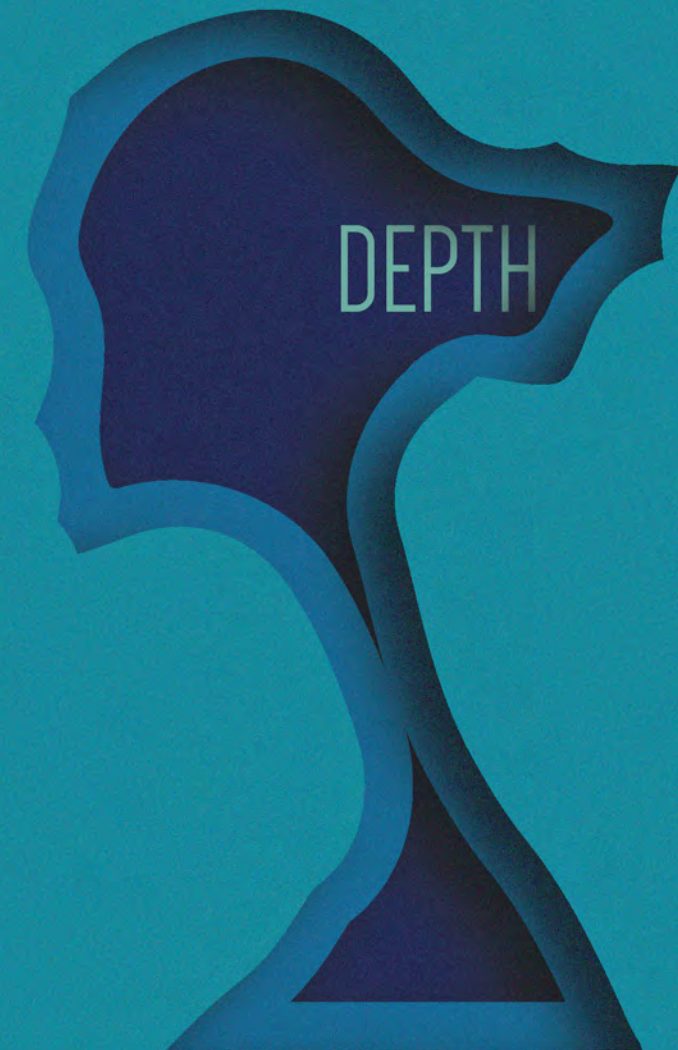
Look Closely. Closer. Let your nose press against the page. Does anything make sense? Now take a step back. What do you see? Sometimes, we have to look from different angles to see the bigger picture.

The YAYA demographic is clouded in misconceptions. But are they really sensitive, one-

dimensional and complacent? Or are these just things your mind wants you to see?

Go ahead – take a moment to see beyond the illusions. Take your time. There’s a lot more to YAYA individuals than meets the eye. They’re critical thinkers, dreamers and activists.

The State of the YAYA is your guide to seeing the YAYA market Under no Illusion. Our data exposes the core truths of this demographic that have been hidden in plain sight. Soon you’ll see these individuals for who they truly are. The thing about illusions is once you see them, you can’t unsee them.



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DEPTH PERCEPTIONS

NEWS CONSUMPTION

It's nearly impossible for YAYA individuals to funnel through endless amounts of information.

It seems as if there's no limit to their access to the news. News institutions interact with YAYA individuals constantly on multiple platforms — CNN is on Snapchat; Newsweek is on Tumblr; the Washington Post has a TikTok. Ironically, the news media still isn't reaching them.

A deeper look reveals that they're overwhelmed by the staggering volume of information they receive. If that isn't enough, the sources are multiplying. News doesn't just come from professional institutions anymore. It can come from anywhere — bloggers, influencers, and even your grandma, who all share news on their social media feeds.

The truth is still out there. It just keeps getting clouded by “fake news” — whatever that is. There are countless definitions out there, but regardless which side of the political fence you stand on, it centers around inaccurate reporting.

As news spreads across platforms, the YAYA demographic's trust narrows. YAYA individuals have deep distrust in the news, and it's only been made worse by the political climate. They don't see news outlets as the reliable, trustworthy sources they should be, so they're taking it upon themselves to decide what to trust. **YAYA individuals are the new protectors of truth.**

FAKES

>> YAYA DISTRUST IN NEWS RUNS DEEPER THAN PREVIOUS GENERATIONS <<

59%
of college students have little to no trust in the press to report the news accurately and fairly, according to recent Knight studies.³

The reality is the truth lives in the shadow of false information. Fake news is so visible that it minimizes the YAYA individual's confidence in the information they receive. They are forced to adapt with the changing factual landscape, which makes them hesitant to trust news outlets.

They don't trust the media because the facts are obscured by false information. In a study from Pew Research Center, 68% of U.S. adults say made-up news and information greatly impacts Americans' confidence in government institutions.

Fake news is seen as even more important than issues like climate change, racism, sexism, illegal immigration and terrorism.²

Sometimes the information the YAYA consumer receives isn't necessarily false, but they still believe it's biased in one direction. Eighty-two percent of YAYA individuals believe news stories are too opinionated, while 87% believe that some news coverage sounds like propaganda.⁴

The YAYA demographic's distrust in the news runs even deeper than previous generations. According

to YPulse, 43% of millennials are confident that their news sources give them accurate information, and 42% said they are extremely confident.⁵ Millennials believe that the news sources they turn to personally are reporting accurately. However, the YAYA demographic is far more skeptical. Thirty-five percent of the YAYA audience believes that everything is fake news.⁴ Yes, *everything*.

32%
of Americans say they often see made-up political news stories online.⁶

20%
of adults say they trust the media.⁷

28% 87% 44%

of those ages 18 to 29 claim to be very loyal to their traditional news source.⁸

of those surveyed are not willing to pay for the news.⁴

of those surveyed believe that their family and friends most influence their political beliefs.⁴

FAMILIARITY

If the news can't be trusted, then what can be? The YAYA individual is trust-falling into what's familiar, relying on those they follow to catch them up on everything current.

Social media is taking over. It's by far the YAYA demographic's biggest news source. Eighty-eight percent of YAYA consumers get news from Facebook regularly, and more than half do so daily.⁹ However, they don't believe

They also don't have a choice. Social media is the center of many YAYA individuals' social and professional lives. Consequently, they're looking to family and friends for help. Sixty-seven percent agree that the media doesn't understand them or people like them.⁴ When news finally does reach them, it's because family and friends

have clarified and contextualized it on social media or private networks like group texts.⁹ It's not traditional, but it works for them.

everything they see. Seventy-two percent believe social media is full of fake news,⁵ but they trust their ability to discern falsehoods from truths.

Only 28% of those ages 18 to 29 claim to be "very loyal" to their traditional news sources, compared to 58% of adults 65 or older.⁸

NEWS



84% of American adults surveyed by Pew felt confident that they can recognize news that is fabricated.⁶

The surplus of available information seems daunting, but there's actually a bright side to it, too. It forces the demographic to peel back layers of news to reveal the real facts. As a result, the YAYA individual has become an intentional and independent decision-maker.

YAYA individuals don't just take the news at face value.

Seventy-eight percent believe that the media does not fact-check.⁴ They don't think the media is doing its job, so they're doing it themselves. A majority of those surveyed use Google or another search engine to fact-check the news regularly.² In fact, a mere 8% of YAYA citizens claim they never fact check the news.⁴

Thirty-nine percent of our survey respondents selected "neither" when asked to describe their political party affiliation. When they run across information or opinions contrary to their beliefs, they don't let it sway them. One in ten surveyed believe their political beliefs are most influenced by "other" factors. Out of those who answered "other" factors, 43% believe their own

personal thoughts, knowledge and experiences have the most influence on their beliefs.⁴

As a product of the digital age and the fake news phenomenon, YAYA individuals are trained to think for themselves.



91% of millennials report seeing diverse opinions once they encounter the news.⁹



43% of those who reported seeing diverse opinions in the news also reported investigating opinions other than their own.⁹

DOUBLE TAKE

20%

of adults say they can trust the media, and the same share say there is only one version of the truth.

32%

of Americans say they often see made-up political news stories online.

64%

of YAYAs believe everything is fake news.

82%

YAYA individuals feel that news stories are too opinionated.

87%

said that some news coverage sounds like propaganda to them.

IN PLAIN (HIDDEN) SIGHT

How should you interpret all these facts? Position transparency as a core company value. YAYA consumers want honesty from the companies they support. Honest companies are open about company culture. They discuss important current events relevant to the company. They're up-front regarding supply chains and product sourcing. An honest company is clear about data privacy policies and usage and is accessible to consumers online — especially on social media platforms. From a list of professional news outlets, The New York Times, the Washington Post and CNN were among the most trusted by the YAYA market.² It's not a coincidence. The New York Times not only dedicates resources specifically to regularly fact checking, but it invites readers to submit their own corrections. The result is a sense of trust, which – for a demographic that is generally skeptical – is invaluable. In short, remember your YAYA consumers are smart. They're always searching for the answers.

POLITICS & AMERICAN CITIZENSHIP

The YAYA individual's trust in the media is wavering. As distrust grows, their optimism for a better future shrinks.

As the youngest demographic able to vote, they're still trying to figure out what it means to be a good citizen. They want to be informed about political leaders, legislation and public policy. However, lack of political knowledge was the largest barrier to voting at

17%.⁴ They want to stay up-to-date on current events to make informed decisions, but they don't have information they can trust. As a consequence, they're fact-checking the fact-checkers.

YAYA citizens in the U.S. really care about their world. They want to make changes for the sake of their own futures and for those around them. **YAYA individuals are social entrepreneurs.**



>> LAYERS AND LAYERS AND LAYERS OF ANXIETY <<

The YAYA individual feels layers and layers of anxiety about their future. At first glance, it appears this is merely because young adults are at a turning point in their lives. They're going to college, graduating, getting their first jobs, and some are getting married or having children. An in-depth look reveals the YAYA individual is anxious about more than their own future.

On top of their own stress, they're constantly inundated with bad news—human rights violations, government corruption or dwindling resources. The well-being of the world is a top-of-mind issue.

They can't think about their own lives if they're scared they won't have a planet to live on. Focusing on solutions to environmental issues is a core and immediate concern for

younger generations. Eighty-eight percent of YAYA individuals agree that if we do not take immediate action to solve global warming, conditions will worsen and grow more costly.⁴

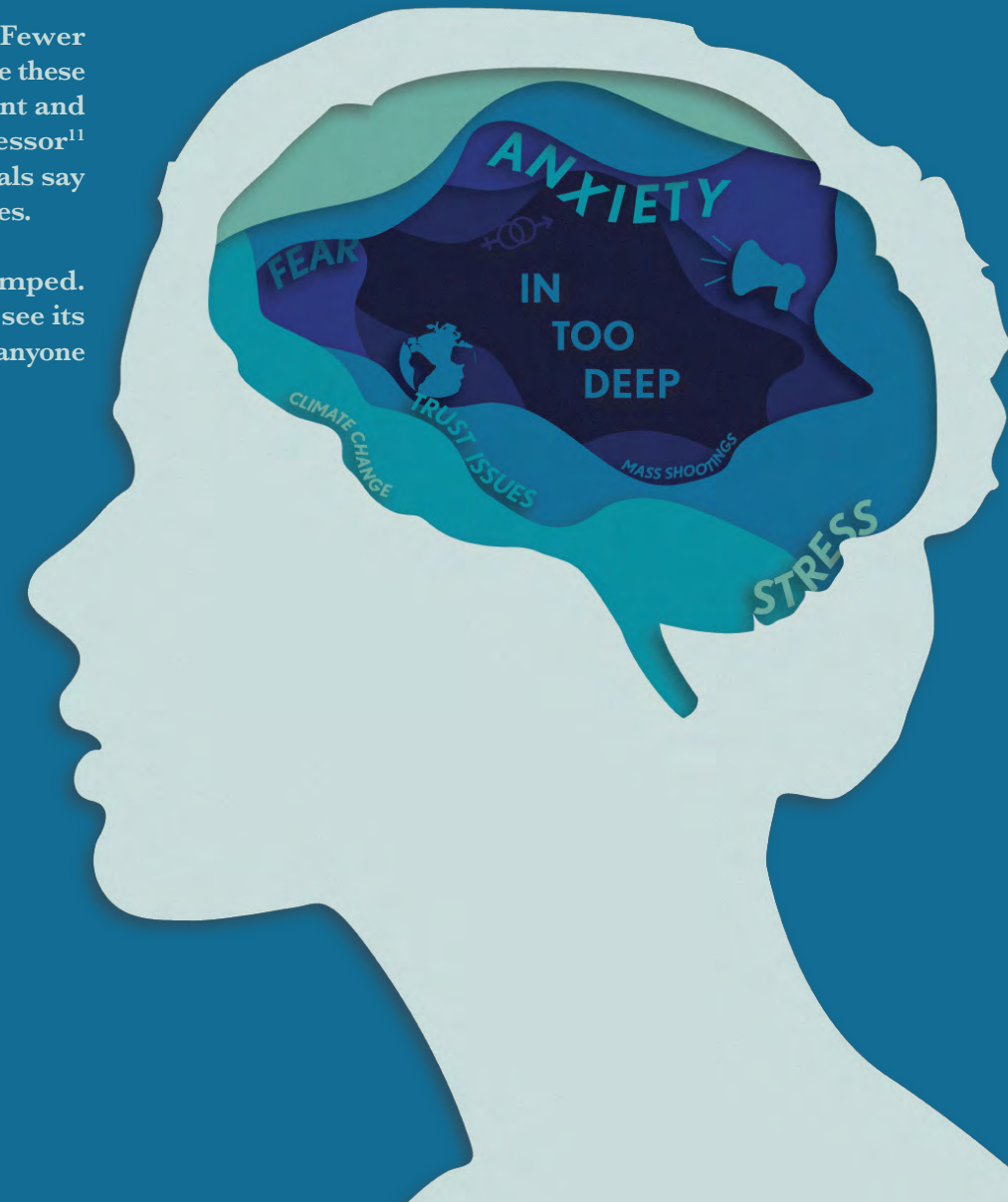
Young Americans have “eco-anxiety” — even more so than older generations. Gallup reports 70% of those ages 18 to 34 worry about global warming, compared to 62% of those ages 35 to 54 and 56% age 55 and older.¹⁰

Additionally, 57% of Gen Zs say the separation and deportation of immigrant and migrant families is a significant source of stress; on the other hand, only 45% of adults consider this a stressor.¹¹

YAYA individuals and older Americans differ in the way they process widespread sexual

harassment and assault. Fewer than 40% of adults overall cite these reports of sexual harassment and assault as a significant stressor¹¹ while 75% of YAYA individuals say they worry about these issues.

The YAYA individual is stumped. They look at the planet and see its problems, but they don't see anyone providing a solution.



From a list of issues ranging from economic recession to discrimination, at least 72% of the youth-and-young-adult demographic said they worry about each of these issues.⁴



Economic recession



Terrorist Attacks



Police Brutality



Sexual Assault/Harassment



Climate Change



Discrimination

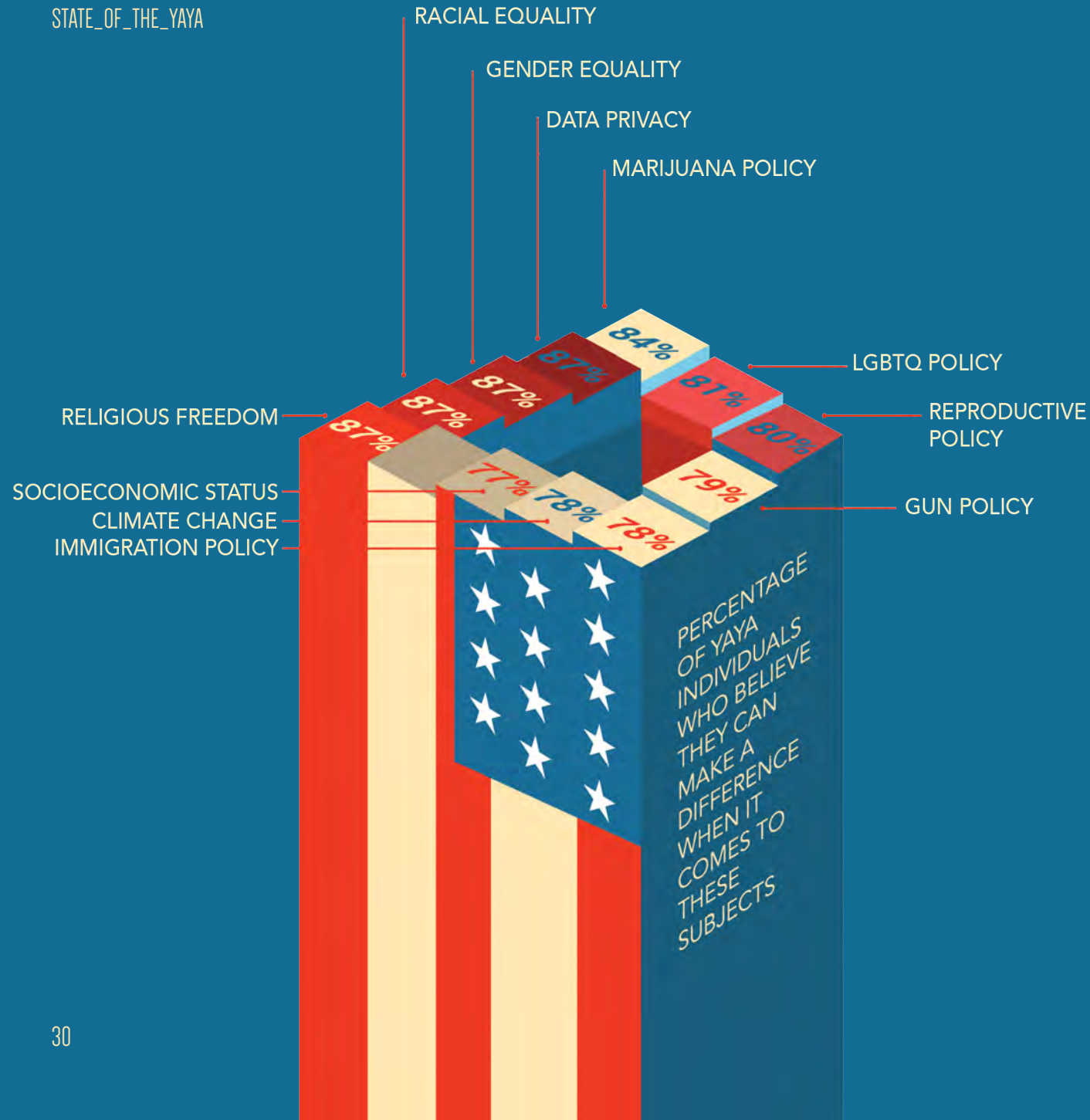


Mass Shootings

2019 saw an increase in mass shootings. As a result, 75% of those in Generation Z report mass shootings to be significant source of stress, and “nearly as many (72%) say the same about school shootings or the possibility of them occurring.”¹¹ Additionally, 57% of Gen Zs say the separation and deportation of immigrant and migrant families is a significant source of stress; on the other hand, only 45% consider this a stressor.¹¹ Gen Zs and older Americans differ in the way they process widespread sexual harassment and assault reports in the news. More than half of Gen Z (53%) cite these reports as a significant source of stress and fewer than 40% of adults overall say the same.¹¹

The YAYA individual is stumped. They look at the planet and see its problems, but they don't see anyone providing a solution.

IN
TOO
DEEP



PERCENTAGE OF YAYA INDIVIDUALS WHO BELIEVE THEY CAN MAKE A DIFFERENCE WHEN IT COMES TO THESE SUBJECTS

YAYA individuals are worried others are not doing enough to change their future. This brings us to the final layer of their anxiety: YAYA individuals believe they are the ones who have to step up to the responsibility of creating a better world.

It's a heavy burden. The reality is they don't necessarily want to take it on, but they feel compelled to do so. They start by participating in political discussions. You can see it all over their Twitter feeds and timelines.

Social media is a cornerstone of their political expression and the first step they take toward change. According to the 2017 Western Union Global Study, millennials from 15 different countries say that "staying connected to global news via social media (49%), connecting with people from different cultures (47%) and interacting with people who are different from themselves (42%) is their way of creating a world they want for the future."¹² The same study found that approximately 90 percent of millennials agree

that a better global future can be achieved through collaboration. They believe that countries need to stop competing and start collaborating.

There is a misconception that the YAYA demographic is overly sensitive because they're quick to call out injustices on social media. However, the ability to think and speak freely is an integral part of the YAYA individual's identity.

Ninety percent of YAYA individuals agree that it's important to listen to views different from their own. Additionally, 78% of those surveyed agree that they feel comfortable voicing unpopular opinions. Eighty-one percent of YAYA individuals agree that people are too concerned with being politically correct.⁴

Essentially, it's the freedom to speak their truth that helps them exemplify good citizenship. Eighty-seven percent of those surveyed believe in the freedom to engage in political discussion, and 94% believe voicing their opinion is important to the idea of being an American.⁴

Political discussions garner a sense of empowerment among YAYA individuals. Discussion gives them the skills to work together, to look inward and to find motivation to make an impact. At least 77% agreed that they could make a difference on every issue, from policy changes to social equality to environmental issues.⁴ When asked about their ability to ignite change on various issues, the highest percentage of respondents selected "strongly agree" on every issue.

According to Mintel, Gen Z had the highest percentage of respondents who said they have the ability to change the world.¹³ The Christian Science Monitor reports that 48% of youth ages 15-22 believe they can have some effect on the government.¹⁴

They have power to affect change and they know it. Is it something they wanted? Not completely. But their anxiety leaves them no choice. Institutions failed to solve their problems. If their news organizations and elected politicians can't be trusted, then the future is up to them.

DOUBLE TAKE

35%

of YAYA individuals always worry about discrimination.⁴

38%

of YAYA individuals ALWAYS worry mass shootings.⁴

55%

of Gen Z calls the current political climate a source of stress.¹¹

59%

of Americans think people should be allowed to express unpopular, deeply offensive opinions in public.¹⁵

80%

agree that PC silences important discussions.⁴

IN PLAIN (HIDDEN) SIGHT

Encourage and foster open conversation and social advocacy both internally within the workplace and externally in the public sphere. Silence creates more anxiety than conversation ever could, so it is important to address issues that resonate with YAYA individuals. YAYA individuals have a strong sense of their ability to make a difference and ignite important conversations. That is why it's important for companies to navigate these social landscapes that are becoming more important to YAYA individuals and employees.

Facilitating difficult — yet important — discussions is

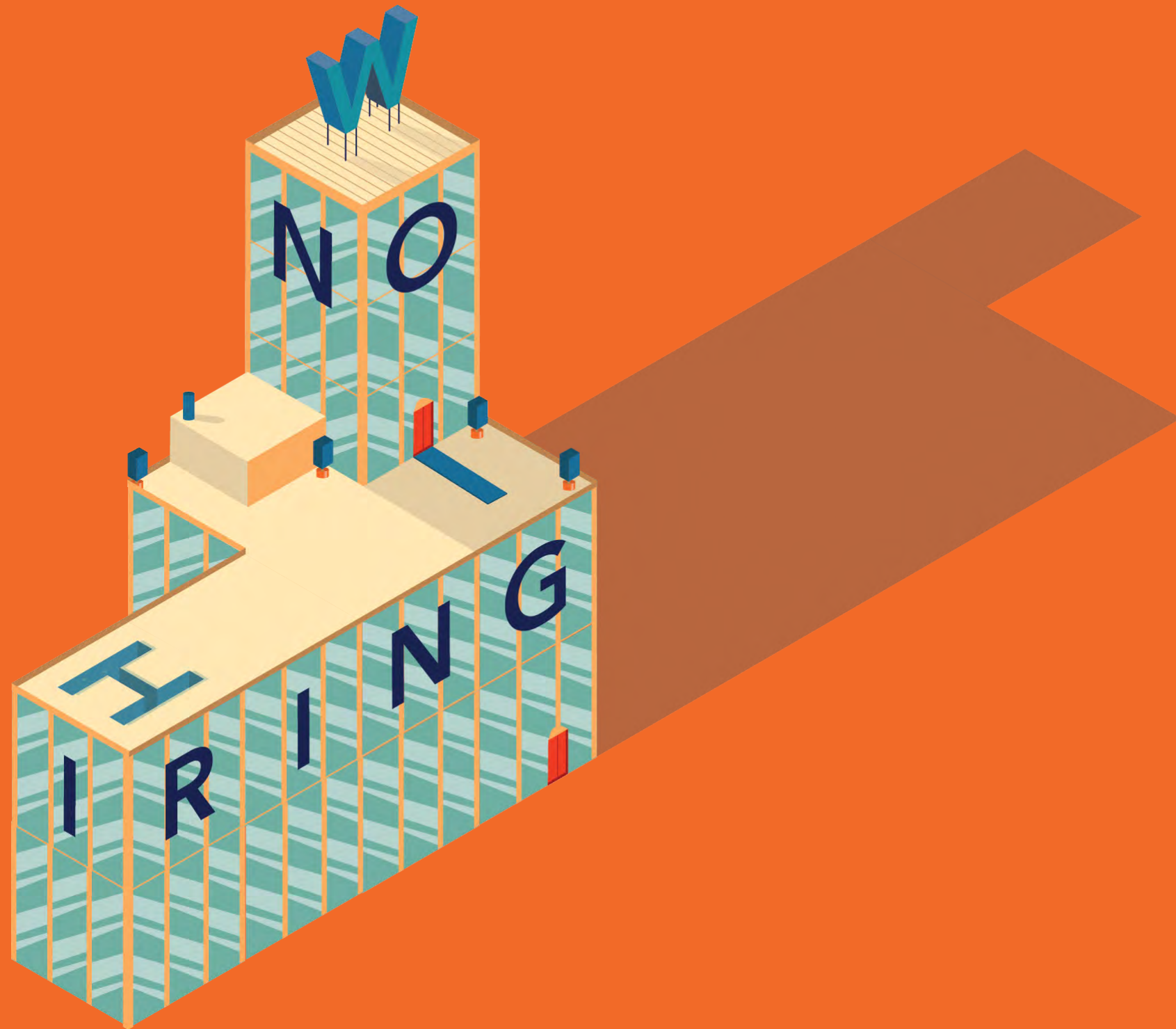
one method for employers to engage with employees in a meaningful way.

One great example of this is the “Day of Understanding.”¹⁶ On Dec. 7, 2018, the Clorox Company participated in day-long discussions on understanding and embracing difference, fostering education and creating a more inclusive culture within their organization. Clorox participated with over 100 other companies. Employees ranging from recent college graduates to executives attended.¹⁷

Brands like Clorox let YAYA individuals know they have someone to help them make

the big impacts they're trying to achieve.

Outside of just participating in the “Day of Understanding,” Clorox has been taking unitary action to assure it's informing its employees of implicit bias and how to combat it. Clorox hosted the CEO Action Check Your Blind Spots tour bus at its Pleasanton, California campus. This bus tour stops at college campuses, company headquarters and towns across the nation. At this event, the bus included virtual reality goggles and phone receivers, so participants could “look through a different lens” and “see someone else's reality.” Through these events Clorox



SOCIAL RESPONSIBILITY

YAYA individuals know that a better future isn't as far away as they thought. The changes they want to see are almost within their reach. However, the actions they're taking as individuals are not enough.

The sheer number of challenges seem to tower over the YAYA demographic. This makes significant change seem unlikely, and it's too much for them to bear alone.

YAYA individuals are reaching past the boundaries of their

own demographic and out to an audience that can actually make change. They want to see solutions in writing. They want legislative changes that will go beyond the surface of the problem and actually bring results. They need people to help lift the world up with them, so they're putting out an ad:

Help wanted: YAYA individuals seeking reliable allies.



45%

of U.S. adults say government, politicians and elected officials bear a great deal of responsibility for preventing made-up stories from gaining attention.⁶

70%

of young Americans view politicians as very or somewhat responsible for our democracy's problems, regardless of political affiliation.¹⁸

90%

of millennials will buy from a brand whose social and environmental practices they trust.¹⁹

YAYA individuals see collaboration as the key to long-term relief from their anxieties. They realize that working together is the answer to narrowing in on the solution to the challenges they face.

Eighty-eight percent of young adults agree that a better global future can be achieved through collaboration.¹² YAYA individuals recognize that profound change will only happen when those in power join their cause.

YAYA individuals are stepping up and taking responsibility for their futures, but they know they need help. They are realists. They recognize that individual actions will not have the large-scale results they desire.

While they are not sure exactly which actions will make a difference, they're trying to do little things regardless. When asked what sustainable practices they took part in, only 8% did none of the 10 actions listed, which ranged from

recycling to being vegetarian or vegan.² The most popular choices were recycling (23%) and using reusable straws and grocery bags on a weekly basis (15%). Ten percent said they repurpose everyday products to reduce waste.⁴

They believe these individual actions can help to chip away at the issue of climate change — it might not be a lot, but breaking up the task of saving the planet into smaller actions helps to relieve some of their eco-anxiety. It gives



them peace of mind to know that they are actively trying to make a difference, no matter how small.

However, the YAYA demographic knows the disparate actions of everyday people may not be enough to combat climate change, and they need institutions to bridge the gap and provide meaningful solutions. While young adults believe the national government is most responsible for tackling climate change,²⁰ the lack of action has created a strong sense of distrust between the YAYA individual and the government.

There is no consensus on what the best solution is to climate change, but YAYA individuals believe working together is a step in the right direction. Approximately 90% of young adults surveyed internationally agree that we need to stop competing and start collaborating.¹²

Older generations associate corporate social responsibility

with economic responsibility, whereas millennials associate the concept with more social and environmental issues. Rather than simply being economically responsible and ethical, the YAYA demographic expects companies to go beyond the status quo. They want companies to take a stand



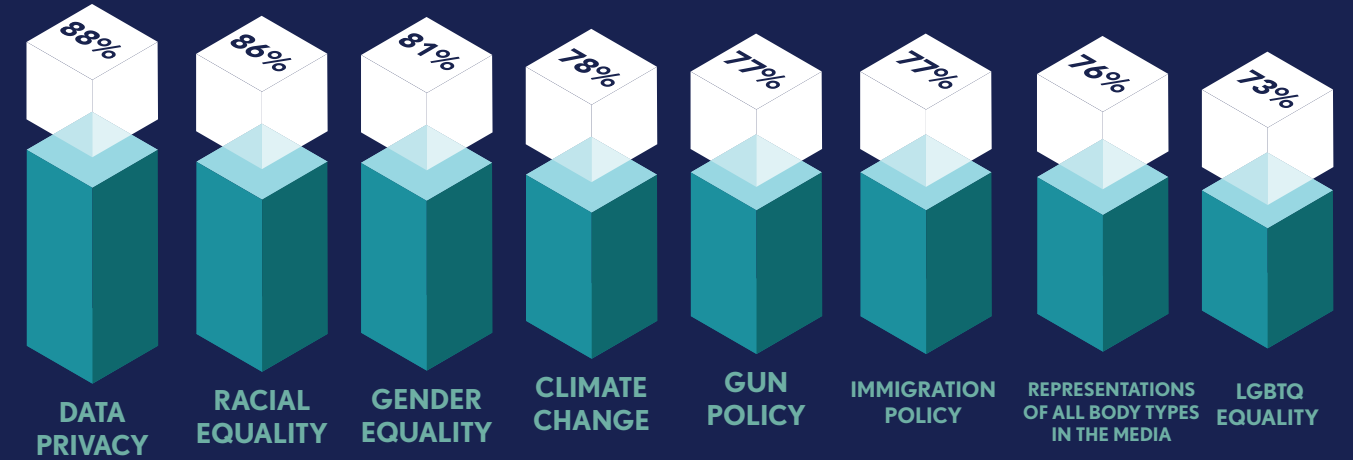
on issues that matter to them. Over 73% of YAYA individuals said they believe companies should address issues ranging from climate change, to social inequality, to data privacy.⁴

YAYA individuals are forced to get creative about who they turn to for solutions. Instead of placing their hope in historically

powerful institutions – such as the government – YAYA individuals see companies as a viable vehicle through which solutions will come. They believe they can make a difference by showing an intolerance for inaction, forcing institutions to do their part. They see an opportunity for companies to become the new thought leaders when it comes to environmental issues.

YAYA individuals want to see coordinated effort and results *now*. They are tired of waiting or aimlessly reacting. They keep an eye out for companies who aren't living up to their expectations, and they aren't afraid to speak up or act out to put pressure on these companies to change.

PERCENTAGE OF YAYA INDIVIDUALS WHO BELIEVE COMPANIES SHOULD ADDRESS THE FOLLOWING:



YAYA individuals have high expectations and will call out those who don't meet them.

The future of all YAYA citizens is in the hands of those in power, so they want to make sure it's in responsible hands.

They're already skeptics and critical thinkers when it comes to news. But with corporations, their skepticism gets the results they want. They recognize where their power is most effective.

Sixty-four percent of YAYA individuals agree that they are skeptical when a company claims to be green, and 76% are likely to go so far as to personally fact check those sustainability claims.⁴

If you disappoint or deceive them, expect consequences. Not only will they be quick to let their whole network know — friends, family and their social media followers — but some will cease to use the product or service entirely.

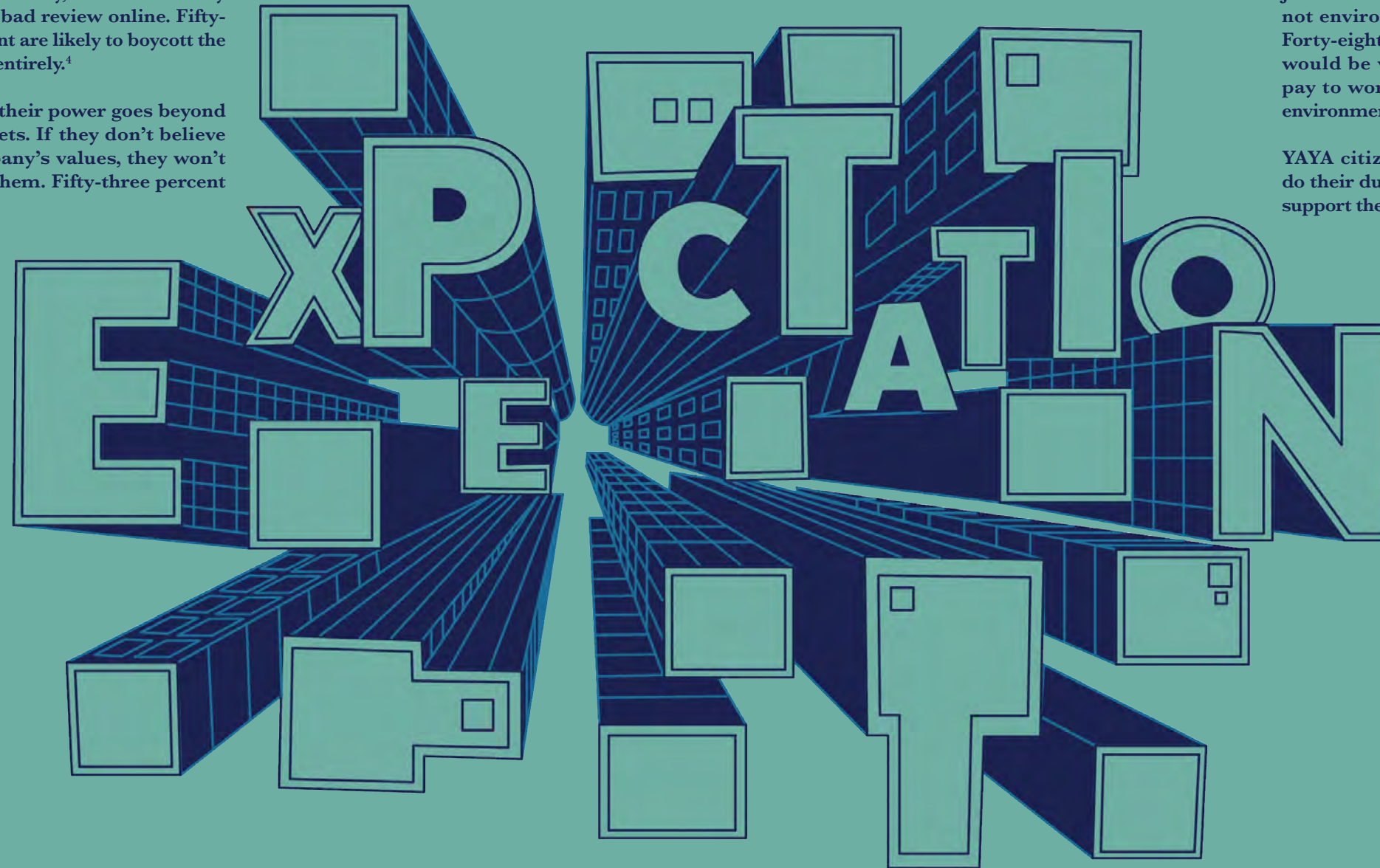
In fact, 46% of those we surveyed are likely to call a company out on social media when it disappoints them, and 50% are likely to write a letter or email the company. Eighty-eight percent will share

their impression of a company with friends and family, and 67% are likely to write a bad review online. Fifty-four percent are likely to boycott the company entirely.⁴

However, their power goes beyond their wallets. If they don't believe in a company's values, they won't work for them. Fifty-three percent

of those surveyed would refuse a job offer from a company that is not environmentally responsible. Forty-eight percent agree that they would be willing to accept lower pay to work at a company that is environmentally responsible.⁴

YAYA citizens feel like they can't do their duty if corporations won't support them.



DOUBLE TAKE

53%

of those surveyed would refuse a job offer from a company that is not environmentally responsible.

78%

of those surveyed are likely to fact-check sustainability claims.

86%

believe that it is important for companies to address racial inequality.

88%

believe that it is important for companies to address data privacy.

IN PLAIN (HIDDEN) SIGHT

Here's the trick to helping the YAYA individuals. Position your brand as a partner in their efforts to improve society. YAYA individuals want meaningful action from people and companies in positions of power. This means collaborating with others – whether that's with governments, other corporations or individuals – to make the world a better place for future generations.

Look at Everlane, a sustainable clothing brand known for being vocal on climate change. Last month, when President Trump officially pulled out of the Paris Agreement, Everlane donated \$50,000 dollars to the Natural Resources Defense Council.²¹ The donation made the company more than just a supporter; it became an advocate for change. Everlane also asked its consumers to start calling their elected officials to

act. Everlane provided them an opportunity to share what they personally do to fight the climate crisis in their community, stating “the real power lies in us working together.”

The YAYA market expects brands to be good corporate citizens, but on top of that, they want corporations to be their supporters. They need them to take large-scale actions that they can't do on their own.

NOW YOU'VE SEEN IT.

It's easy to see why the YAYA market needs help. It seems being a good global citizen is more than a full time job. As they dive into their search for the truth and the answers, they become more engrossed in politics and social issues.

When you really look at YAYA individuals for who they are, you'll see they really care about being good citizens, not just for their own benefit, but for everyone else's. Their ambition for change takes up a lot of their energy, so they need a partner to pull them out of the hole they're falling into.

Working with those in power is the answer they've been looking for, and it's been hidden in plain sight all this time. The YAYA market cannot realistically accomplish everything they hope on their own. They need collaboration for the sake of their world's future.

In fact, a deeper look makes it clear that with the help of everyone else, the YAYA demographic actually does have the ability to fix the problems they see and will create the social change they feel responsible for making.

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MISSOURI JOURNALISM ADVERTISING
 SPECIALISTS IN ALL THINGS YOUNG

MOJO AD

STATE OF THE YAYA REPORT + LIVE WEBCAST

SOY

UNDER NO (duality)
ILLUSION

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(mojo ad)

MOJO Ad is a student-staffed, full-service agency at the Missouri School of Journalism. We are specialists in all things young, specifically 18- to 24-year-olds. We call them the Youth and Young Adult (YAYA™) market.

This market is complex, ever-changing and elusive. Fortunately, we are a part of the YAYA market. We post, share and discuss things with them. We see them for who they truly are.

(state of the yaya)

The State of the YAYA is an annual, in-depth report compiled and written by MOJO Ad staff. The report is based on our national quantitative study of 700+ 18- to 24-year-olds. Each year, we help marketers understand and connect with YAYA consumers and their world. This report not only sheds light on who they are, it highlights their attitudes and behaviors on everything from mental health in the workplace to political issues and media consumption.

YAYA individuals are in a pivotal life stage. They are 31 million strong in the United States and generate an aggregate income of \$463 billion.² They are about to decide whether to stick with the brands they have used their entire lives or try something new. If marketers fail to look beyond initial perceptions, they could lose them forever.

(under no illusion)

Look closely. Closer. Let your nose press up against the page. Does anything make sense? Now take a step back. What do you see? Sometimes, we have to look from different angles to see the bigger picture.

The YAYA demographic is clouded in misconceptions. But are they really sensitive, one-dimensional and complacent? Or does your mind simply perceive them as such?

Go ahead and take a moment to see beyond the illusions. We've got time. There's a lot more to YAYA individuals than meets the eye. As you'll learn in the pages that follow, they're critical thinkers, dreamers and activists.

The State of the YAYA is your guide to seeing the YAYA market Under No Illusion. Our data uncovers the core truths of this demographic that have been hiding in plain sight. Soon, you'll see these individuals for who they truly are.

The thing about illusions is, once you see them, you can't *unsee* them.

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(walking through life)

WITH A SECONDHAND LENS

Balancing the online and offline worlds simultaneously seems impossible.

In the past, these two realms have been separate and distinct from one another. However, in an increasingly digital world, 18- to 24-year-olds have proven the two can not only coexist but also meld

together. This market's behaviors make it difficult to discern where the digital realm stops and reality begins. Why the blurred lines? Media consumption.

YAYA consumers spend a lot of time consuming media, so it's crucial to understand this digital life they lead.

AGE & GENDER

(determine social media preferences)

When it comes to social media preferences, YAYA consumers aren't all opening the same apps.

When determining which platforms to spend time on, each has unique preferences. How they spend this time is specific to who they are, but there are more commonalities among this demographic than you would think.

Essentially, older and younger YAYA consumers are living in two separate worlds when it comes to social media. Older YAYA individuals prefer more traditional apps like Facebook (59% of 22- to 24-year-olds vs. 37% of 18- to 21-year-olds), while the younger age bracket prefers video-heavy apps like Snapchat (54% of 18- to 21-year-olds vs. 41% of 22- to 24-year-olds).¹

Another example of disparity? Gender. YAYA women are spending more time on Snapchat, Instagram and Facebook than YAYA men.^{*1} Reddit is one of the few sites that YAYA men spend more time on than YAYA women.¹

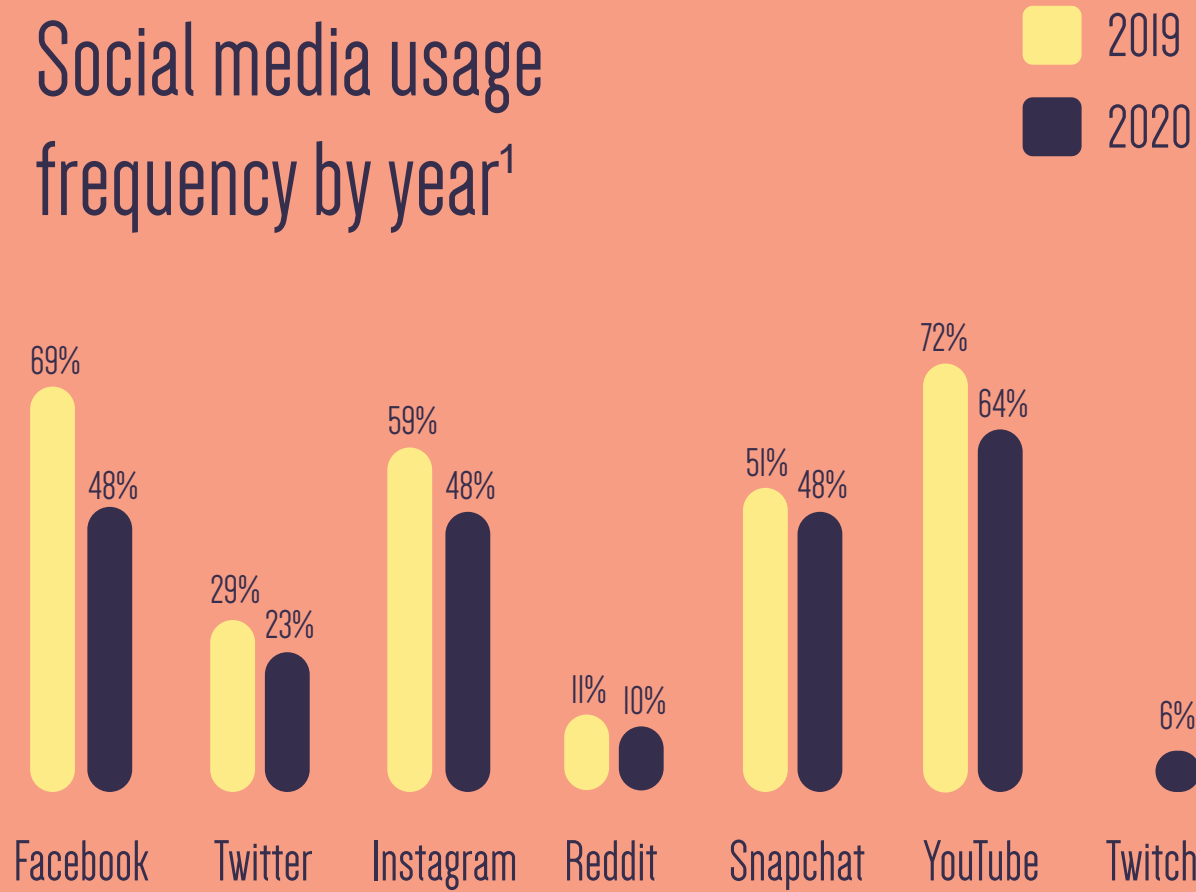
Despite this divergence, there is common ground among the YAYA market — YouTube. Regardless of age or gender, YAYA individuals are spending a lot of time on this video platform. In fact, it's the only app that more than 60% of YAYA consumers visit multiple times a day, which is pretty rare considering how many options are available within today's digital landscape.¹



64%

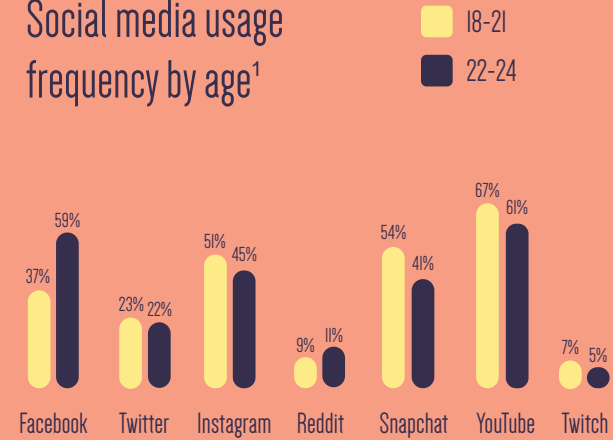
visit YouTube multiple times a day.¹

Social media usage frequency by year¹

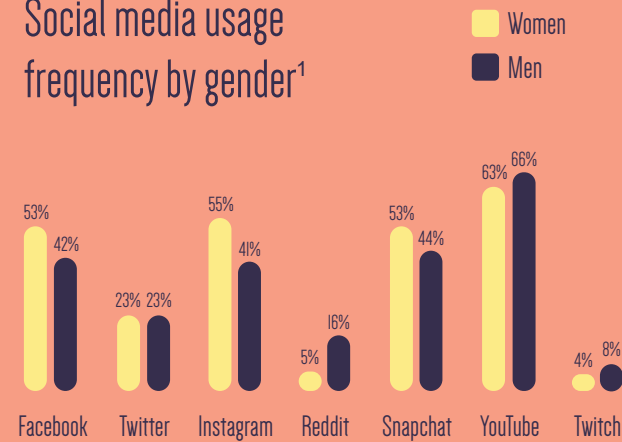


*No data collected in 2019

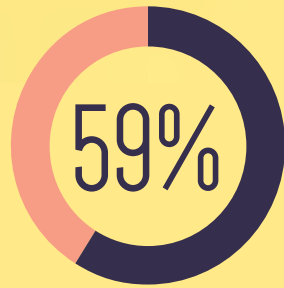
Social media usage frequency by age¹



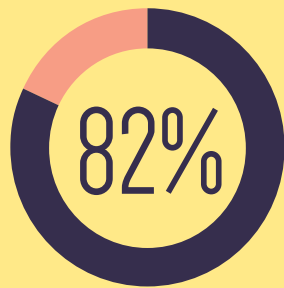
Social media usage frequency by gender¹



(double take)



get as much fulfillment from watching someone play a video game as they do from playing it themselves.¹



gain confidence watching others do something online before doing it themselves.¹

(surviving on) THE EXPERIENCES OF OTHERS

Given the popularity of YouTube, this demographic lives life through a secondhand lens.

They spend hours watching videos, from makeup tutorials to clips of people playing video games. For the YAYA market, the real world and the digital sphere mirror one another.

YAYA consumers want to watch people clean, cook and do anything else that they should probably be doing themselves. In the past two years, the watch time for “morning routine” videos has tripled.³ Watching others on video platforms like YouTube has become a new form of entertainment unique to this market. For example, 59% of YAYA individuals say it is just as fulfilling to

watch someone else play a video game as it is to play it themselves.¹

There’s more to video than a sense of satisfaction and entertainment for the YAYA market, though. It is a huge source of knowledge. In fact, 82% of this demographic gains confidence watching others do something online before doing it themselves.¹ Videos explaining anything from how to change a tire to how to tie a tie reassure them that they can handle adulthood.

This habit of watching has led to a convergence of the real world and the virtual world. YAYA consumers’ online lives are a direct link to all aspects of their day-to-day undertakings.

(double take)

x3

Watch time for “morning routine” videos has more than tripled in the past two years.³



watch videos of people performing normal tasks like eating or cleaning their room.¹

COMMUNITY

(on their home screen
& at home)

Another area where the real and online worlds fit together for this demographic is in the construction of relationships.

How does this work? Well, 18- to 24-year-olds always have a phone on them. From social media to online gaming, the YAYA market has found a way to create a network of relationships in the palm of their hand. In fact, over half (65%) of the YAYA market agrees that meeting people online is a healthy way to start a friendship, and for 26%, their best friend is an online-only friendship.¹

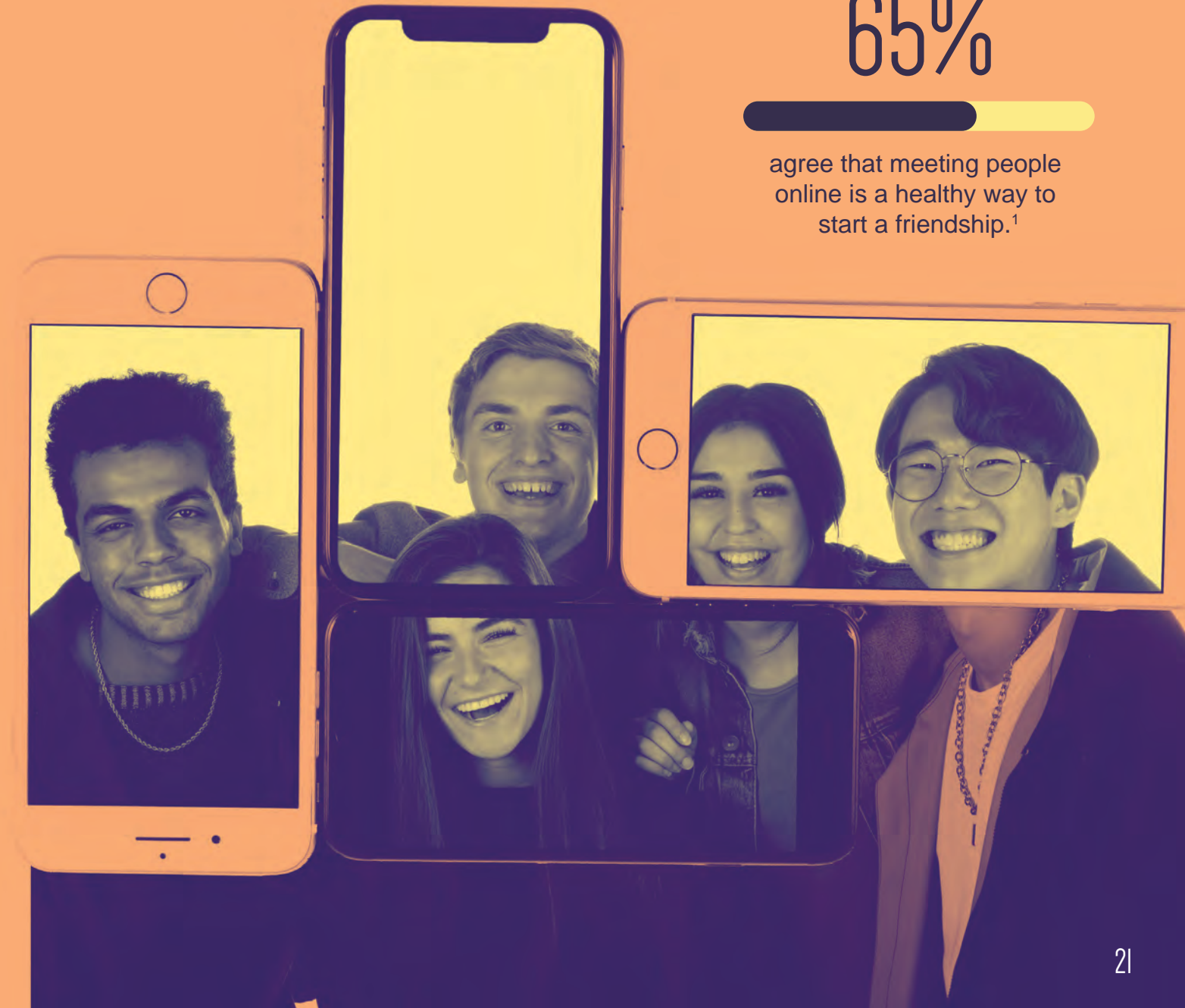
It's easy to think that the lives of YAYA individuals exist solely online, but let's refocus and take a look through a different lens. Yes, YAYA individuals' faces are

constantly aglow from the blue light of Facebook messenger, Instagram DMs or iMessages, but social media isn't the only way to build a relationship with this demographic. According to Mintel, only 2% of the YAYA market lives alone.⁴ They want to be physically surrounded by people. Whether it be friends or family, 18- to 24-year-olds want a support system. Bottom line, they are social creatures, and Facebook friends and Instagram followers alone just don't cut it.

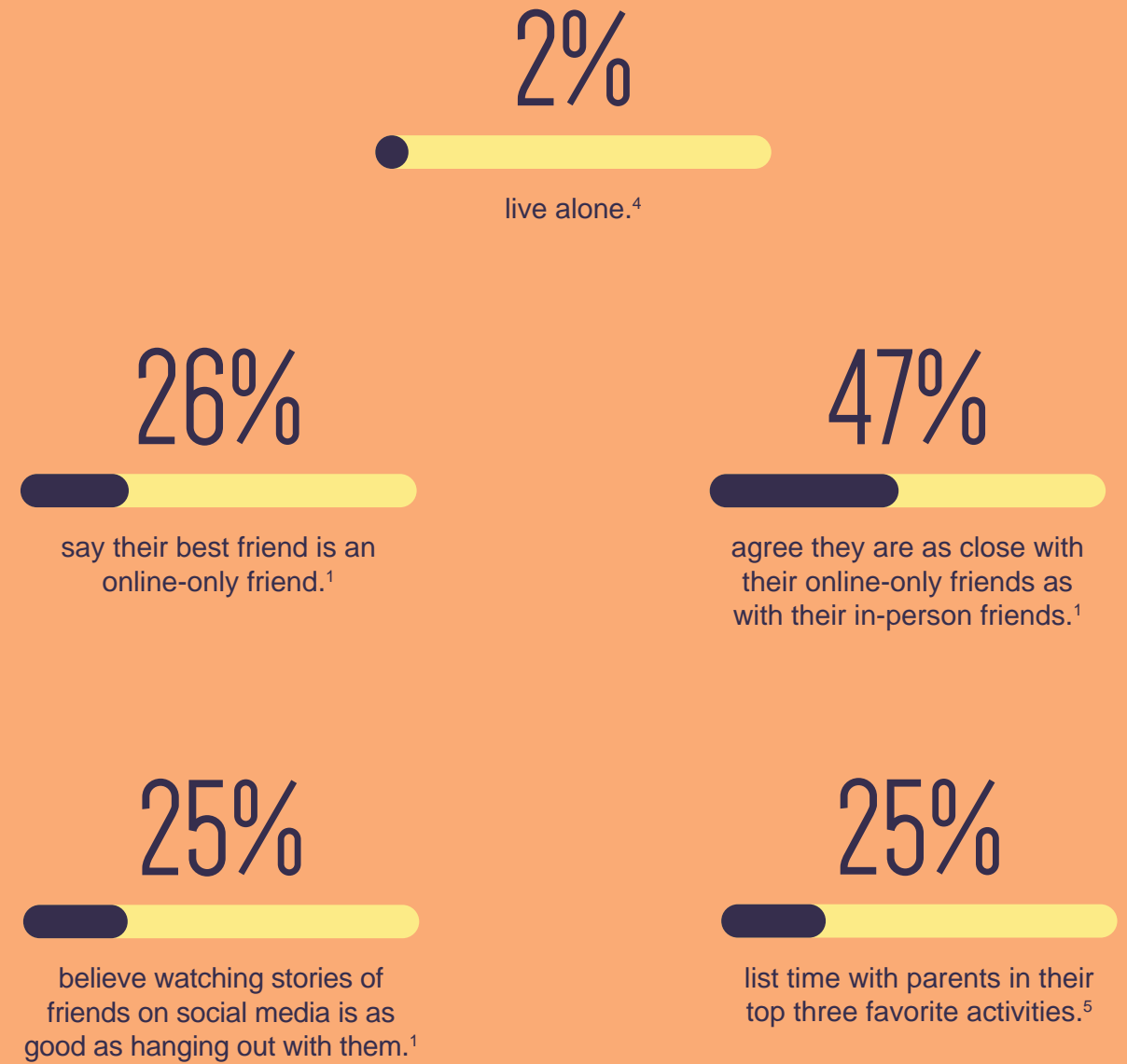
There is a balance between real-world relationships and online relationships for YAYA consumers. They don't see them as two different entities but rather as one intertwined network of connections.

65%

agree that meeting people online is a healthy way to start a friendship.¹



(double take)



(hidden in)

PLAIN SIGHT

(making sense of it all)

Marketers need to reevaluate their presence on YouTube. Brands that are doing well on the platform aren't overtly pushing their brand but rather creating content that might pop up on a user's "Recommended" page. When it comes to video content, marketers need to give viewers a firsthand experience. Making the consumer feel like they are living out the situation in the video is key. From a women's magazine to an action camera company, see how brands are utilizing the secondhand lens YAYA consumers look through.

(who gets it)

Glamour, a prominent women's magazine, understands that its audience is women of varying ages who all share a common sense of curiosity. The magazine has produced videos covering everything from how to live on a \$40,000 salary in LA to who killed Tupac.⁶ The key to the success of these videos is that real women share their answers. It feels natural for viewers to watch these videos because the brand stays on the sidelines and lets the stories do the talking.

While scrolling through GoPro's YouTube page, consumers aren't bombarded with product reviews and features. GoPro's videos depict everything from mountain biking to base jumping from a first-person perspective.⁷ This creates a naturally engaging, thrilling experience for GoPro's target audience, adventure seekers, without any blatant marketing tactics.

(making sense of it all)

The rise of secondhand experiences is not something to ignore. Consumers want to interact with brands through video, but these interactions don't have to be revolutionary. Marketers can integrate their brands into videos of people performing everyday tasks, like cleaning their kitchen or bedroom. They can also join in on secondhand experience platforms, such as Twitch.

(who gets it)

Wendy's took gaming to the next level by dropping into Fortnite and livestreaming the battle on Twitch. For nine hours straight, Wendy's slashed burger freezers to emphasize their dedication to their "fresh, never frozen" standard.⁸ By doing this, Wendy's presence felt natural to viewers.

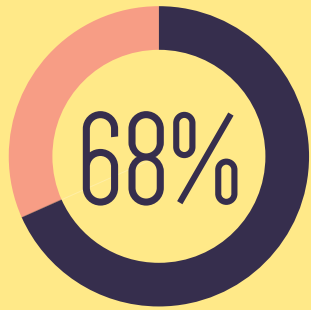
There is a duality between YAYA consumers' digital feeds and what they feed into.

When thinking of the YAYA market's social media presence, filtered selfies and highlight reels steer marketers to believe that YAYA individuals are in the business of building facades and shallow connections, but there is more to the story. This group goes to social media to learn. To connect. To better themselves. They see through filters and followers.

(deeper than)

V
A
N
I
T
Y

Y



68% agree influencers are more credible when they have a smaller but dedicated following.¹



#ADD (seeking more than)

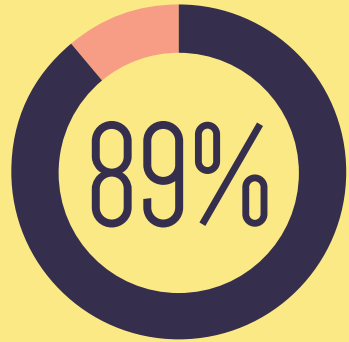
To the unsuspecting eye, a high follower count is the equivalent of credibility online.

However, YAYA consumers don't buy into this fallacy. They've been bombarded with online opinions and product reviews for years, and at this point they just want people they can trust. Enter the influencers.

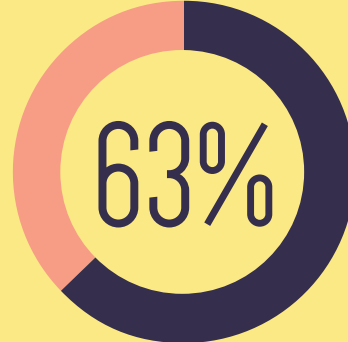
So how do some social media gurus overcome this apprehension and gain the title of "credible" among the YAYA market? It's simple: they're genuine and relatable. According to a study by Lothian-McLean, 18- to 24-year-olds don't respond to high follower counts and the idealistic imagery of influencers.⁹ In fact, 68% of this group agrees that influencers are more credible when they have a smaller but dedicated following.¹

YAYA individuals long for more than just a #ad written in an influencer's Instagram caption. Nearly two-thirds (63%) of YAYA individuals agree that influencers are only trying to make money and don't actually use the products they promote.¹ While they are skeptical, YAYA consumers still turn to influencers for reviews. They don't just want the good commentary — they want the bad and the ugly, too. In fact, 89% of the YAYA market believes influencers are more trustworthy when they share both positives and negatives about a product.¹

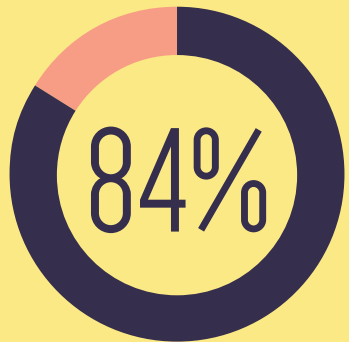
Getting through to YAYA consumers on social media can be a daunting task, but reliable influencers are a great first step. While influencers may hold sway over part of the digital space, there's a new player in the game called ASMR.



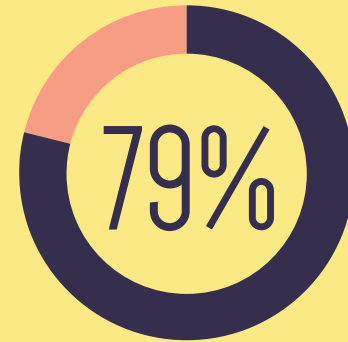
say influencers are more trustworthy when they share both positives and negatives about a product.¹



say influencers are only trying to make money and they don't really use the products they promote.¹



of Gen Z trusts a company more if they use actual customers in their ads.¹⁰



of Gen Z trusts a company more if the images used by the brand are not photoshopped.¹⁰

(double take)

(craving)

SENSORY

B L I S S

The pop of bubble wrap. The smear of paint across a palette. The fanning of book pages.

These are all examples of ASMR, aka autonomous sensory meridian response. For some, ASMR is cringeworthy, but to the YAYA market, it's a mesmerizing rendition of oddly satisfying sounds and visuals.

Get this: 59% of YAYA individuals enjoy ASMR.¹ That's right, the majority of this demographic seeks out videos of soap being cut or even someone softly whispering into a mic. A third of those who like this kind of content enjoy ASMR because it's satisfying.¹ As mentioned earlier, this group has created a new genre of entertainment, watching people do things, and ASMR fits right in.

(online)

Their Instagram feeds and YouTube "Recommended" pages are flooded with oddly satisfying content that they would gladly watch on an endless loop.

This digital trend isn't purely entertainment though. Some ASMR videos are made specifically to help people relax, unwind and even fall asleep. Nearly a fourth (23%) of YAYA individuals who watch ASMR do so because it's stress-relieving.¹ Whether taking a study break or trying to get a good night's sleep, the YAYA market is enchanted by this trend.

It may seem ridiculous that YAYA consumers seek out such unusual content. But, in life's constant busyness, it makes sense that they need something to help them unwind.

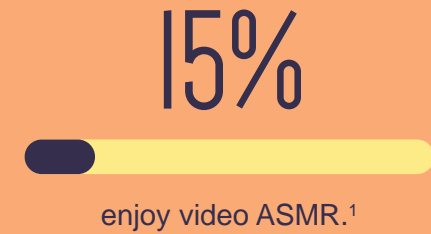
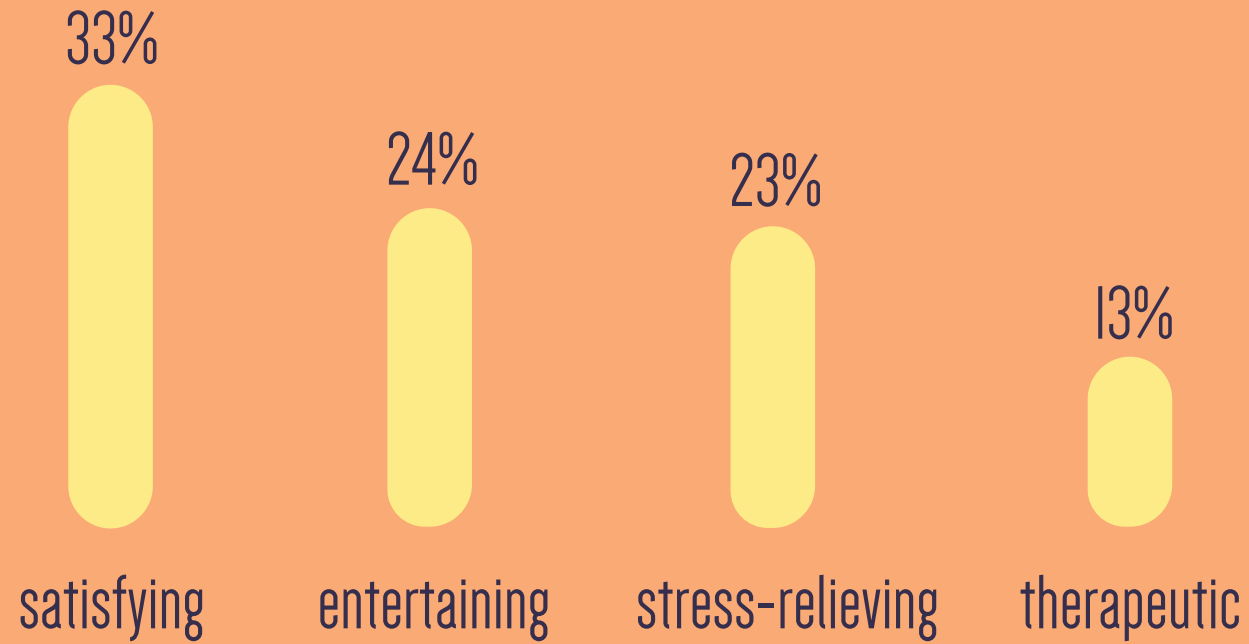
59%



enjoy autonomous sensory meridian response (ASMR).¹



YAYA individuals like ASMR because it is...¹



(double take)

(pressing play on)

SELF-ENHANCEMENT

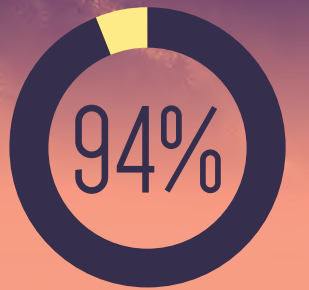
Another way the YAYA market unwinds: audio.

They're infatuated with it. From podcasts to Spotify playlists, audio weaves together beautiful narratives, generating interest among the YAYA demographic.

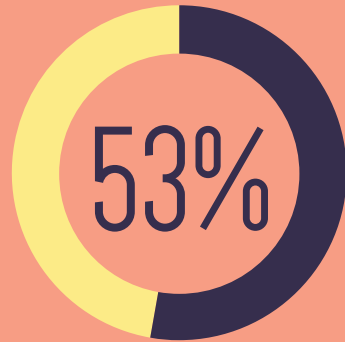
So, at this point you may be asking yourself, "Why the love of podcasts?" Ask around and you're likely to get one of two answers. For 53% of YAYA consumers, they listen to podcasts for entertainment; for 54%, education.¹ From pop culture to infamous murders, this demographic is drawn toward a wide variety of podcast topics. The platform blends together education and entertainment,

compelling the YAYA audience to listen in.

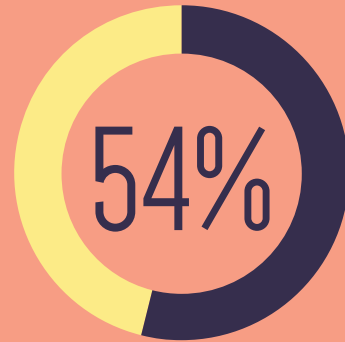
Music has joined the educational bandwagon as well. We're not talking about songs you would sing in school to learn your ABCs or U.S. presidents. For this demographic, music is a way to understand the larger world. In fact, 94% of YAYA individuals agree that music is a great way to learn about other cultures.¹ In this digital age, it is so simple to plug into what is going on across the globe. On Spotify, 18- to 24-year-olds "listen to a broader selection of artists from different countries than any other age groups."¹¹ The YAYA market seeks out albums and artists that give them a glimpse into the world.



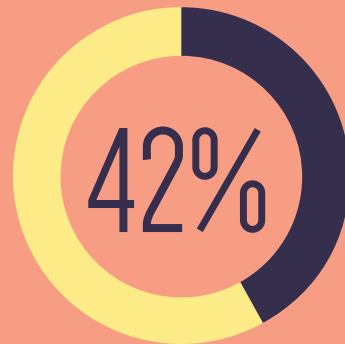
agree music is a great way to learn about other cultures.¹



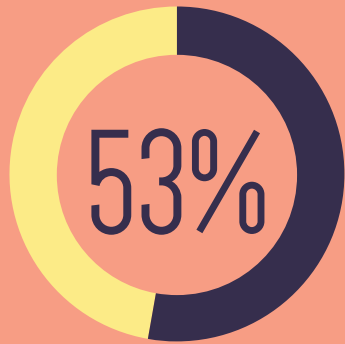
listen to podcasts for entertainment.¹



listen to podcasts for education.¹



of individuals aged 18-34 listen to podcasts at least once a week.¹²



say they would use a podcast to learn more about a brand.¹

(double take)

(hidden in)

PLAIN SIGHT

(making sense of it all)

In order to capitalize on the YAYA market's captivation with all things oddly satisfying, brands should utilize ASMR. For the best results, marketers should blend audio and visuals together. The combination of audio and visual ASMR stimulates the senses and enthralls attention. If brands don't want to become ASMR aficionados themselves, they should consider sponsoring or integrating their products into ASMR content created by top ASMR contributors and influencers.

(who gets it)

Three words: McDonald's Egg McMuffin. Does it sound like the ideal breakfast choice? Maybe not, but McDonald's made it the ideal choice when it utilized ASMR. The brand produced a hypnotizing ASMR video that depicted a colorful graphic design of how the Egg McMuffin is made.¹³ We'll give you a minute to Google it. And a few more minutes to watch it over and over again.

You want an Egg McMuffin now, don't you?

IKEA is another company that has struck a chord in the ASMR world. The brand has a whole YouTube playlist dedicated to ASMR. The videos focus on dorm room furniture. The narrator, doing the notorious ASMR whisper, simply lists IKEA's product features.¹⁴ Initially bland and disenchanting, IKEA made their product descriptions something that YAYA individuals would love to hear.

(making sense of it all)

Influencers are still relevant, even after the Fyre Festival.¹⁵ The criteria for selecting the perfect influencer just needs revamping. Marketers should shoot for niche influencers that have a following within their category. The influencers should be honest and authentic. Let them truly review your products, talking about the positives and negatives. Encourage them to start a discussion with their following. This could include open-ended questions in their captions and tweets or Instagram polls. Bottom line: carefully select influencers that are not only relevant but also candid.

(who gets it)

Jeffree Star is a pioneer of makeup reviews on YouTube. Viewers can rely on Star to give his brutally honest opinion and remain true to himself. When Kim Kardashian sent Star her new makeup kit, Star posted a 25-minute review of the product for his subscribers.¹⁶ He didn't just highlight the favorable attributes of

Kardashian's kit; he made sure to mention features he didn't love. He spoke as if he was talking to a close friend. In turn, Star has cultivated a genuine, honest dialogue with his followers.

(making sense of it all)

Podcasts have a great deal of untapped potential for brands. From joining forces with existing podcasts to creating their own, marketers should be using this medium. YAYA consumers are open to learning more about brands through podcasts. This willingness to learn is a huge asset for marketers.

(who gets it)

Fascinated by Trader Joe's? The grocery chain has created a podcast series dedicated to detailing the ins and outs of the store. The episodes focus on everything from the overly nice crew members to Trader Joe's sustainability efforts.¹⁷ Listeners get an entertaining yet informative glimpse into the aisles.

Brands don't have to assemble their own podcast to join in on this trend though. NPR's podcast, "How I Built This," features entrepreneurs and innovators. Yelp's CEO, Bumble's creator and the mastermind behind DoorDash have all shared their company's story on the podcast.¹⁸ YAYA consumers seek out shows like this to learn more about brands.

(keeping life)

FLUID

For YAYA individuals, sexual orientation* and gender can be contorted and manipulated.

While older generations have constructed finite ideas of sexual orientation and gender, the YAYA market thinks of these concepts fluidly. In the same way, YAYA individuals are breaking down the structure of dating. When it comes

to relationships, they believe in “the one,” but they aren’t necessarily looking for them right now. They are trying to balance bettering themselves and their romantic relationships.

YAYA individuals are elusive — there is no doubt about it. However, when we focus on the facts, this market’s idea of sexual orientation and gender becomes clearer.

*“Sexual orientation is about who you’re attracted to and want to have relationships with.”¹⁹

90%



agree they are focusing on bettering themselves.¹

ME, MYSELF & I

(then us)

It's time to talk about YAYA relationships; however, most YAYA individuals may not be ready for this conversation.

It may not even be on their radar. Almost half (47%) of them agree they do not want to be in a relationship until they are established in their career.¹ On top of that, 90% of this market agrees they are focused on bettering themselves.¹ This may sound like 18- to 24-year-olds only think “me, me, me!”, but don't jump to any conclusions just yet.

YAYA individuals may be focused on themselves and their careers, but here's the kicker: over 60% want to be married in the next five years.¹ If that isn't contradictory enough, almost 70% want kids in the next 10 years.¹

How does this all add up? While YAYA consumers may be currently focused on self-improvement and career goals, relationships haven't slipped their minds. Romance may be on the back burner right now, but it's simmering and still plays an important role in their future.

(double take)

64%



want to be married in the next five years.¹

47%



don't want to be in a relationship until they are established in their career.¹

39%



agree they don't have time to pursue a romantic relationship.¹

69%



want kids within the next 10 years.¹

ROMANCE

(isn't dead — it's just different)

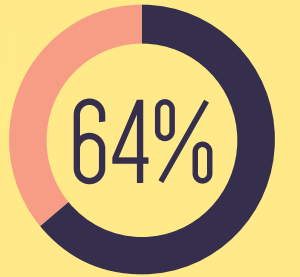
The YAYA market is full of juxtapositions.

While they may have a plan for the next 10 years, ask them about their date night plans. You'll likely hear crickets.

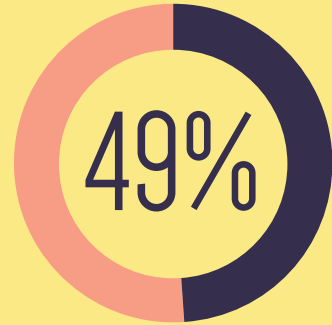
This age bracket's definition of a date is open to interpretation. The YAYA market is split: 43% go into date night with a solid plan, while 49% wait and see where the night takes them.¹ Dates can be anything from "eating at McDonald's, and we just laugh and talk" to something as intricate as "a picnic under the stars with flowers." What it all boils down to is spending time with someone they care for.¹

With this loose definition, it makes sense that 71% of the YAYA market believes they have been on a date.¹ Despite a large number of responses saying that simply ordering a pizza and watching whatever rom-com pops up on Netflix is the definition of a date, YAYA individuals are still romantics at heart. You may be surprised to hear that 64% believe "the one" exists.¹

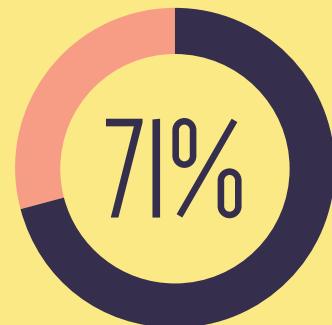
Planned or unplanned, extravagant or mundane, YAYA individuals want romance. It's just a little different than what you've seen in the movies.



agree that
"the one" exists.¹



loosely define dating and are more open-minded about dating parameters.¹



believe they have been on a date.¹

YAYA individuals describe a date as...¹

“... any time you’re spending with a crush or significant other, no matter how small or menial the activity...”

“... a night of two people enjoying each other’s company and getting to know each other.”

“... any quality time spent alone between two people in or interested in a relationship.”

“... any time spent together doing something you enjoy.”

“... staying at home playing video games and eating takeout.”

“... a meeting between two people who find interest in each other to find out more or grow closer to their person of interest.”

(double take)

65%

agree that brands should be gender-inclusive when it comes to advertising.¹



(not tied to) GENDER & SEXUAL ORIENTATION

YAYA individuals are transforming gender and sexual orientation norms. For starters, they don't buy into gendered products.

Walking into a shoe store, one immediately spots the divide between shoes for men and women. Turns out, this great divide isn't popular among 18- to 24-year-olds. When asked what non-gender-specific products YAYA individuals prefer buying, shoes were ranked in the top four among YAYA women and men.¹ Bath products and deodorant also rank within the top five for men and women.¹ This market doesn't care if the design is blue or pink or if a scent is "Musk" or "Sweet Pea and Violet," they just want what they like, regardless of gendered product design.

The traditional views of gender and sexual orientation are being deconstructed by the YAYA market. For instance, 41% agree that their gender does not have to be the sex assigned at birth.¹ This age group isn't as constrained to labels as past generations have been. In addition, a third of this age group identifies as sexually fluid.^{*1} The YAYA market welcomes more open and fluid definitions of sexual orientation and gender.

The topics of gender and sexual orientation are multifaceted. When you look a little closer, it is quite simple: YAYA individuals are open, self-expressive and unapologetically themselves.

^{*}"Sexual orientation and desire are not rigid or continuous throughout their lives; rather, they can be fluid and change over time."²⁰

(double take)

41%

agree their gender does not have to be the sex assigned at birth.¹

33%

agree with the statement "I identify as sexually fluid."¹

YAYA individuals prefer buying non-gender-specific products when it comes to...¹

MEN

1. Bath Products
2. Deodorant
3. Razors
4. Shoes
5. Accessories

WOMEN

1. Razors
2. Clothes
3. Shoes
4. Deodorant
5. Bath Products

(hidden in)

PLAIN
SIGHT**(making sense of it all)**

Marketers have the opportunity to be the welcomed third wheel in YAYA relationships. Dating is being redefined and looks different for everyone, but let's not overcomplicate it. YAYA daters crave romance and intimacy. It's that simple. Brands need to create ways for YAYA individuals to get to know each other and build connections. This could be anything from creating shared experiences to offering up some basic get-to-know-you questions.

(who gets it)

Take Netflix, for example. You know when you hop on your Netflix account and see your significant other watched three episodes of Grey's Anatomy without you? To avoid tragedies such as this, Netflix crafted a simple, out-of-the-box solution: a co-watching contract for couples. The parameters are pretty straightforward and incredibly relatable.²¹

1. I won't fall asleep.
2. I won't get distracted by my phone causing the other person to rewind because I missed something.
3. I won't continue watching a show without the other person present.
4. I won't talk whilst the show is on.
5. In the event that I come across a spoiler, I won't share it with the other person.

Netflix took situations that every account-sharing couple encounters and placed themselves right in the middle of the conversation.

Forbes quite literally interjected themselves into the dating scene. The business magazine collected a list of questions that would be perfect for a first date.²² The questions were even sorted by level of intensity, ranging from mild to hot. Curious about what some of the hot questions were? First up on the list was, "What do you give a damn about?"

(making sense of it all)

It's time to say goodbye to (most) gender-specific products. Marketers can slowly phase out gender-specific products in certain categories, such as bath products, clothes and shoes. In addition, it's important to be mindful and do your research when running gender-inclusive marketing campaigns.

(who gets it)

One brand that has dedicated themselves to gender non-conforming products is Glossier. Early in 2019 the makeup company launched Glossier Play. The makeup line includes colorful eye pencils, highlighters and glitter gel. What makes this campaign different than most? Troye Sivan, a famous pop singer, was the face of the campaign. He posted photos on social media and expressed his excitement about the partnership.²³

Clothing is another category that is inching closer to gender-neutral advertising and design. ZARA, a fashion retailer, hinted at going gender-neutral in 2017 with a line modeled by both men and women.²⁴ A year earlier, the retailer rolled out a unisex line, Ungendered.

(seeing clearly)

By now, we hope the once elusive YAYA market has come into focus. Just to be sure, let's summarize. YAYA individuals are experiencing a good portion of their lives through a secondhand lens. They go much deeper than the surface level and like to keep life fluid. They are living simultaneously in the digital realm and the real world. Their actions can often contradict their actual preferences and beliefs. To put it simply, they live in dualities. These dualities seem perplexing (and they can be), but once we recognize them, we can understand how to effectively capture the heart of the YAYA market.

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(Special thanks to photographer Maddie Davis)

(attributions)

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STATE OF

THE YAYA

(under no illusion)



Missouri School of Journalism

University of Missouri



VOL III

EMPLOYMENT_HEALTHCARE_FINANCE

2020

UNDER NO ILLUSION

YAYA

TOTALITY

MISSOURI JOURNALISM ADVERTISING

SPECIALISTS IN ALL THINGS YOUNG

STATE OF THE YAYA REPORT+ LIVE WEBCAST

MOJO AD

SOY

T O T A L I T Y

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MOJO AD

MOJO Ad is a student-staffed, full-service agency at the Missouri School of Journalism. We are specialists in all things young, specifically 18- to 24-year-olds or, as we call them, the Youth and Young Adult (YAYA™) market.

This market is complex, ever-changing and elusive. Fortunately, we are the YAYA market. We post, share and discuss things with them. We see them for who they truly are.

STATE OF THE YAYA

The State of the YAYA is an annual, in-depth report compiled and written by the MOJO Ad staff. The report is based on our national quantitative study of 700+ 18- to 24-year-olds. Each year, we help marketers understand and connect with YAYA consumers and their world. This report not only sheds light on who they are, it highlights their attitudes and behaviors on everything from mental health in the workplace to political issues and media consumption.

YAYA individuals are in a pivotal life stage. They are 31 million strong in the United States and generate an aggregate income of \$463 billion.¹ They are about to decide whether to stick with the brands they have used their entire lives or try something new. If marketers fail to look beyond initial perceptions, they could lose them forever.

UNDER NO ILLUSION

Look closely. Closer. Let your nose press up against the page. Does anything make sense? Now take a step back. What do you see? Sometimes, we have to look from different angles to see the bigger picture.

The YAYA demographic is clouded in misconceptions. But are they really sensitive, one-dimensional and complacent? Or does your mind simply perceive them as such?

Go ahead and take a moment to see beyond the illusions. We've got time. There's a lot more to YAYA individuals than meets the eye. As you'll learn in the pages that follow, they're critical thinkers, dreamers and activists.

The State of the YAYA is your guide to seeing the YAYA market Under No Illusion. Our data uncovers the core truths of demographic that has been hiding in plain sight. Soon you'll see these individuals for who they truly are.

The thing about illusions is, once you see them, you can't unsee them.

C O N T E N T S

06

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EMPLOYMENT

SALARY VS. PASSION
SIDE HUSTLES
GHOSTING
BURNOUT
DOUBLE TAKE
HIDDEN IN PLAIN SIGHT

20

22
24
26
28
29

HEALTH

MOST DAMAGING ISSUE
MENTAL = PHYSICAL
SELF-CARE
DOUBLE TAKE
HIDDEN IN PLAIN SIGHT

30

32
34
36
38
40
41

FINANCE

FINANCIAL INDEPENDENCE
CONCERN
CONFIDENCE
DIGITAL WALLETS
DOUBLE TAKE
HIDDEN IN PLAIN SIGHT



YET BUILDING
UP AGAIN.

YAYA consumers are known for looking at life in new, innovative ways. These forward-thinkers don't stop at their personal lives. They find ways to design their professional lives to fit their personal needs.

At first glance, it's clear that YAYA workers push themselves to the brink, juggling work, side hustles and social activities. But if you look closely, you'll see that's not the full picture. When YAYA consumers look at their never-ending to-do lists, they see an investment in their future. After giving their professional lives everything they've got to the point of exhaustion, they expect to rise and rebuild their careers to fit their visions of a dream job.

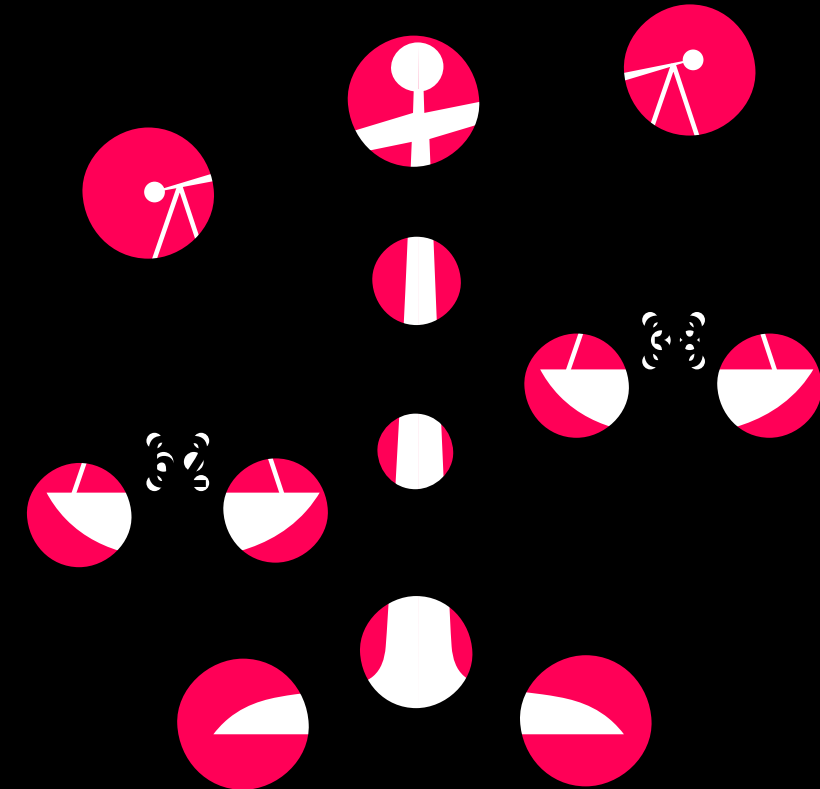
There is an assumption that the YAYA dream job allows YAYA employees to

feel good about themselves and make a difference in society. Upon closer inspection, the reality is that they are overwhelmingly concerned about finances while job hunting. Our research shows that the primary reason that YAYA employees would choose one job over another is income and earnings. However, the majority of YAYA consumers said that passion is more important than salary in a job.

This tricky balance of passion and projected income starts to make sense when you think about it situationally. When choosing a career, YAYA prospects go with their heart, but when choosing between different jobs within the path they're passionate about, the deciding factor often comes down to financial stability and opportunity.

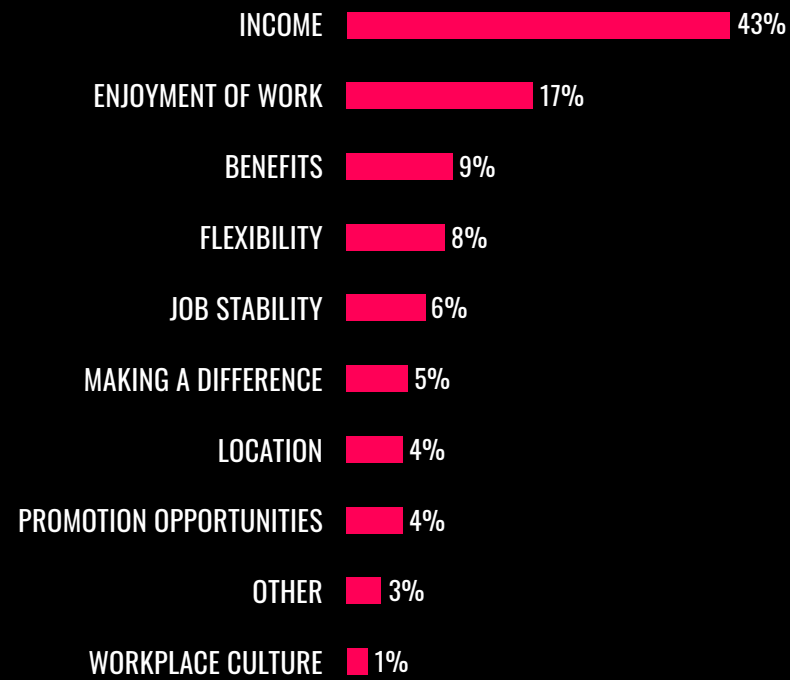
PASSION 62%

SALARY 38%

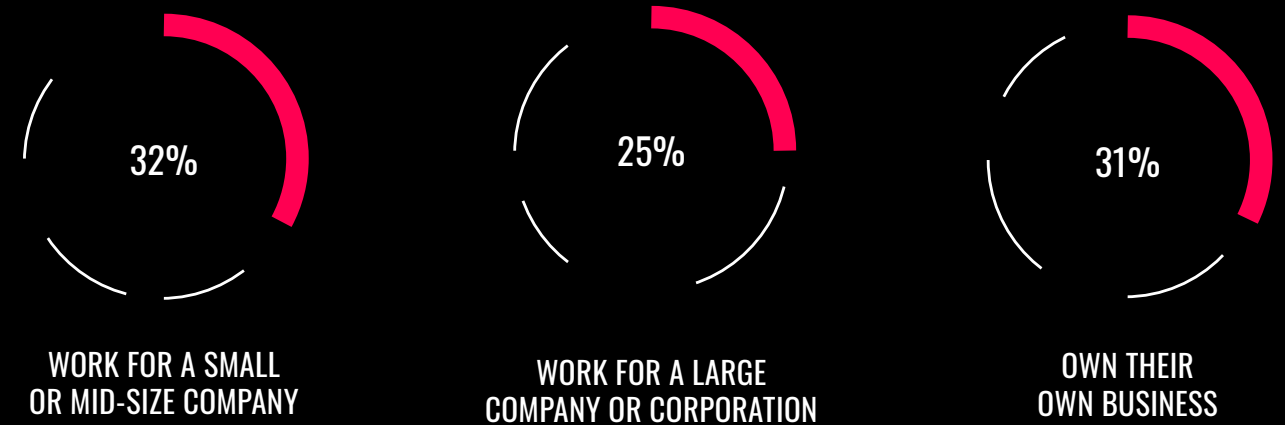


WHAT
IS MORE
IMPORTANT
IN A JOB?

PRIMARY REASON TO CHOOSE ONE JOB OVER ANOTHER...



WHEN THINKING ABOUT FUTURE EMPLOYMENT...

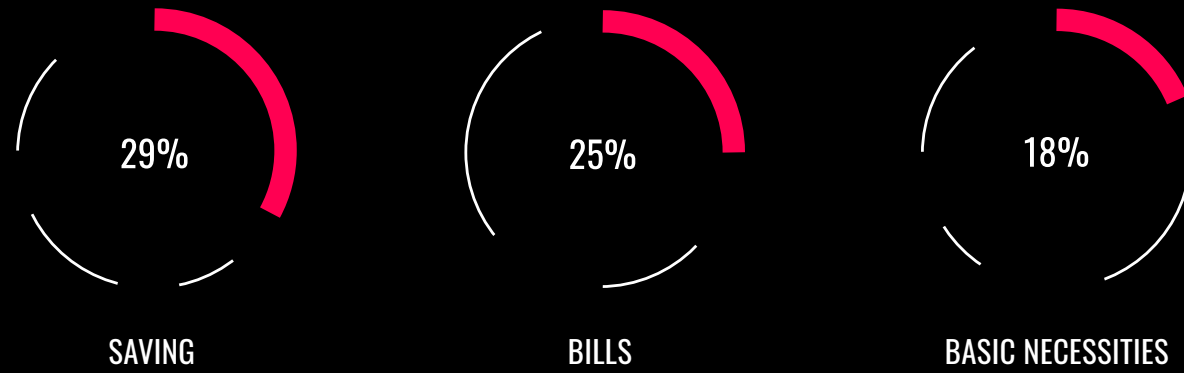


These self-starters look beyond the standard 9-to-5 job and strive to start their own businesses. They're not afraid of building their dream work life from the ground up.

According to Mintel, younger adults are more interested than older generations in being their own boss.² One quarter of Gen Z adults consider this a must-have.²

This goal of being their own boss reflects the bigger picture of how driven YAYA consumers are. Unfortunately, this spirit and the work required to reach that dream also comes with a lot of stress. Until they reach their ultimate entrepreneurial expectations, they are willing to push themselves to the brink.

WHY DO YAYA CONSUMERS SEEK SIDE HUSTLES?



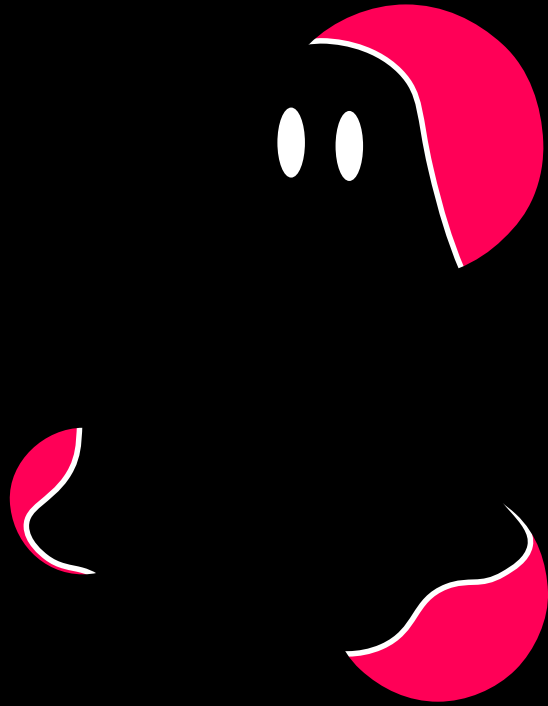
Despite YAYA consumers' constantly packed schedules, they still feel pressure to take on multiple jobs to make ends meet. These jobs appear in the form of side hustles. A side hustle is any type of employment a YAYA worker has in addition to their full-time commitment, whether that be work, school or another engagement.

This group of YAYA consumers has a wide range of talents and is eager to put them to

work for companies that will, in turn, help them grow and support themselves.

Side hustles are integral to how YAYA workers work and live. In fact, 86% of respondents have considered taking on a side hustle and 74% say they need more than one job just to make ends meet.³ This additional income often goes toward savings, bills and basic necessities.

70%
HAVE HAD A
SIDE HUSTLE.

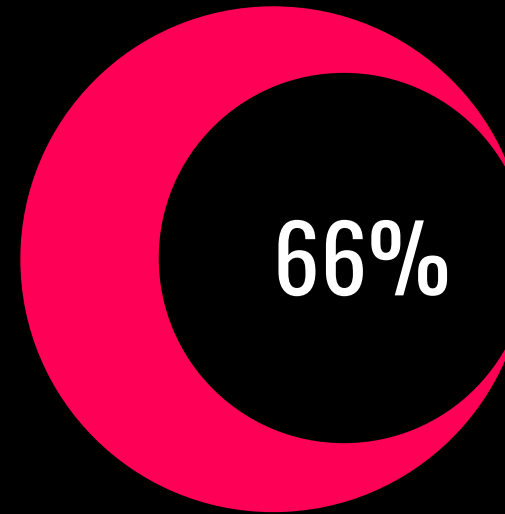


YAYA consumers are known for leaving their peers “on read” as an avoidance tactic. This phenomenon of “ghosting” someone in their personal lives has spread into YAYA workers’ professional lives. Despite this demographic’s dedication to their careers, an increasing number of 18- to 24-year-old job prospects will accept a job offer and then never show up for their first day. Often, they do this without even informing the employer.

This epidemic is hard to comprehend as an observer. Sometimes, YAYA prospects don’t even see it, but employers do. Employers may initially interpret ghosting as a lack of loyalty or respect. However, YAYA workers do not intend to come off that way. In fact, many YAYA job prospects do not realize that they are doing it.

Only 22% of our respondents³ said they have ghosted an employer. However, according to CNBC, a Randstad study found that 66% of employers report they have been ghosted by someone in Gen Z.⁴

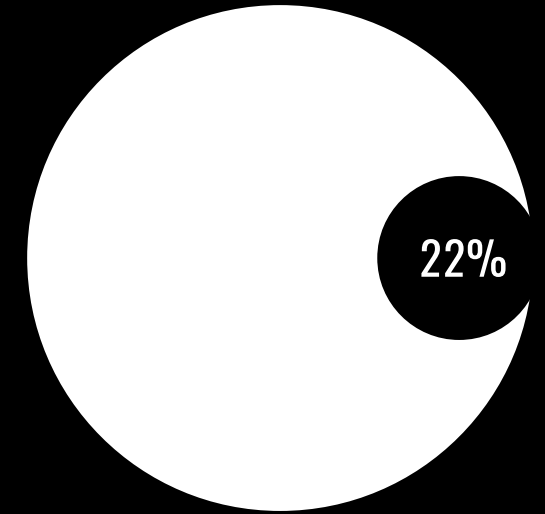
Ghosting is often the result of a general miscommunication between 18- to 24-year-olds and employers during the application stage and beyond. YAYA applicants feel left in the dark because companies do not fully explain the application process or next steps required to get hired. Without clear directions, YAYA consumers feel lost and less invested in the process.



6
EMPLOYERS HAVE THAT
BEEN GHOSTED

At the end of the day, YAYA workers are focused on their professional future, with 87% saying that achieving their personal goals is more important than company goals.³ Thus, if one professional opportunity is not fulfilling their needs, they are willing to pursue an option that gets them closer to where they want to be.

Although not always apparent, YAYA consumers want to follow workplace etiquette and be respectful to employers.

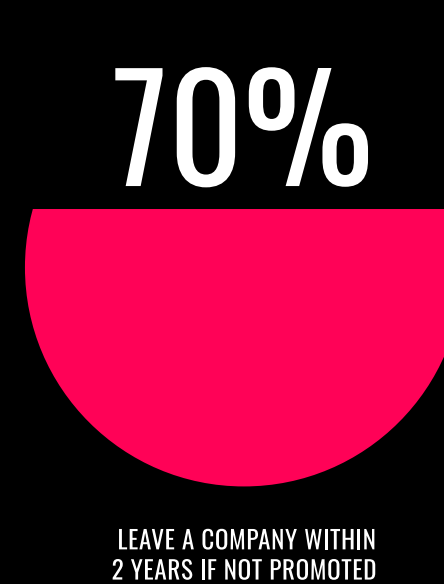


YAYA CONSUMERS WHO
ADMIT TO GHOSTING

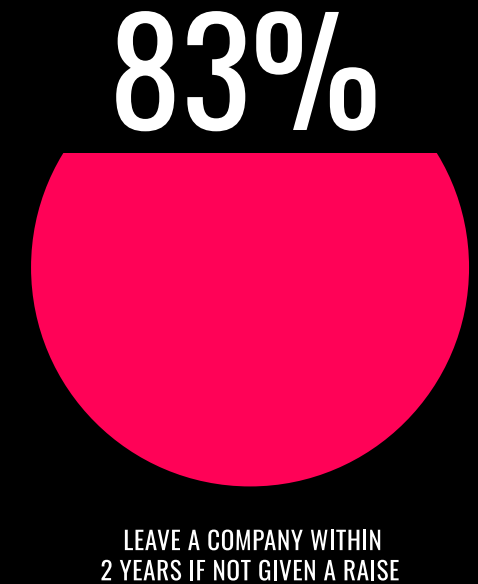
Truth is, 89% of YAYA consumers say it is important to give an employer two weeks notice before leaving a job.³ Additionally, trust in employers is high among YAYA workers with 73% of respondents saying that, in general, they trust employers.³ This percentage is on par with the global average. According to Edelman, 75% of people globally trust their employers.⁵

Between full-time jobs, side hustles, social lives and everything else they juggle, YAYA individuals have a lot going on. The resulting stress leads to a growing phenomenon — burnout.⁶ Burnout is a syndrome resulting from stress that has not been successfully managed, and it is nothing to take lightly.

The World Health Organization has even declared burnout an official workplace syndrome.⁷ Symptoms include a lack of energy, exhaustion, overwhelming negativity and reduced efficacy, all of which can have a significant impact on workplace performance as well as life in general.



YAYA consumers are particularly susceptible to burnout because they encounter higher levels of stress at a younger age than their predecessors. The YAYA path-to-employment starts early in school. YAYA students push themselves to do their best in the hopes of academic success leading to apprenticeships, internships and other experiences that will clearly differentiate them within the job market.



According to Deloitte, 84% of Millennials say they have experienced burnout, compared to 80% of all respondents.⁸ Clearly, burnout is on the rise with younger generations as they enter the workforce, and it can have a significant impact on their professional lives. Nearly half of Millennials say they have left a job specifically because they felt burned out, compared to an average 42% of all respondents to the Deloitte survey.⁸

**YAYA CONSUMERS ARE LEADING
THE CHARGE**

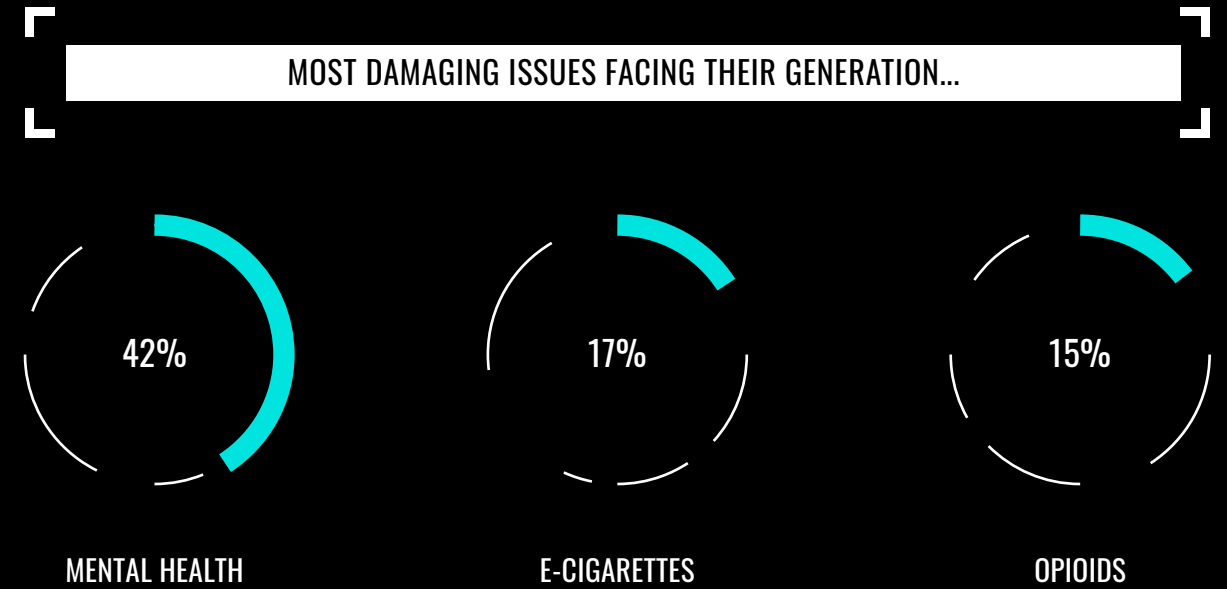


**OF A
MENTAL HEALTH REVOLUTION.**



MENTAL HEALTH
IS THE **MOST DAMAGING**
ISSUE FACING THEIR
GENERATION.

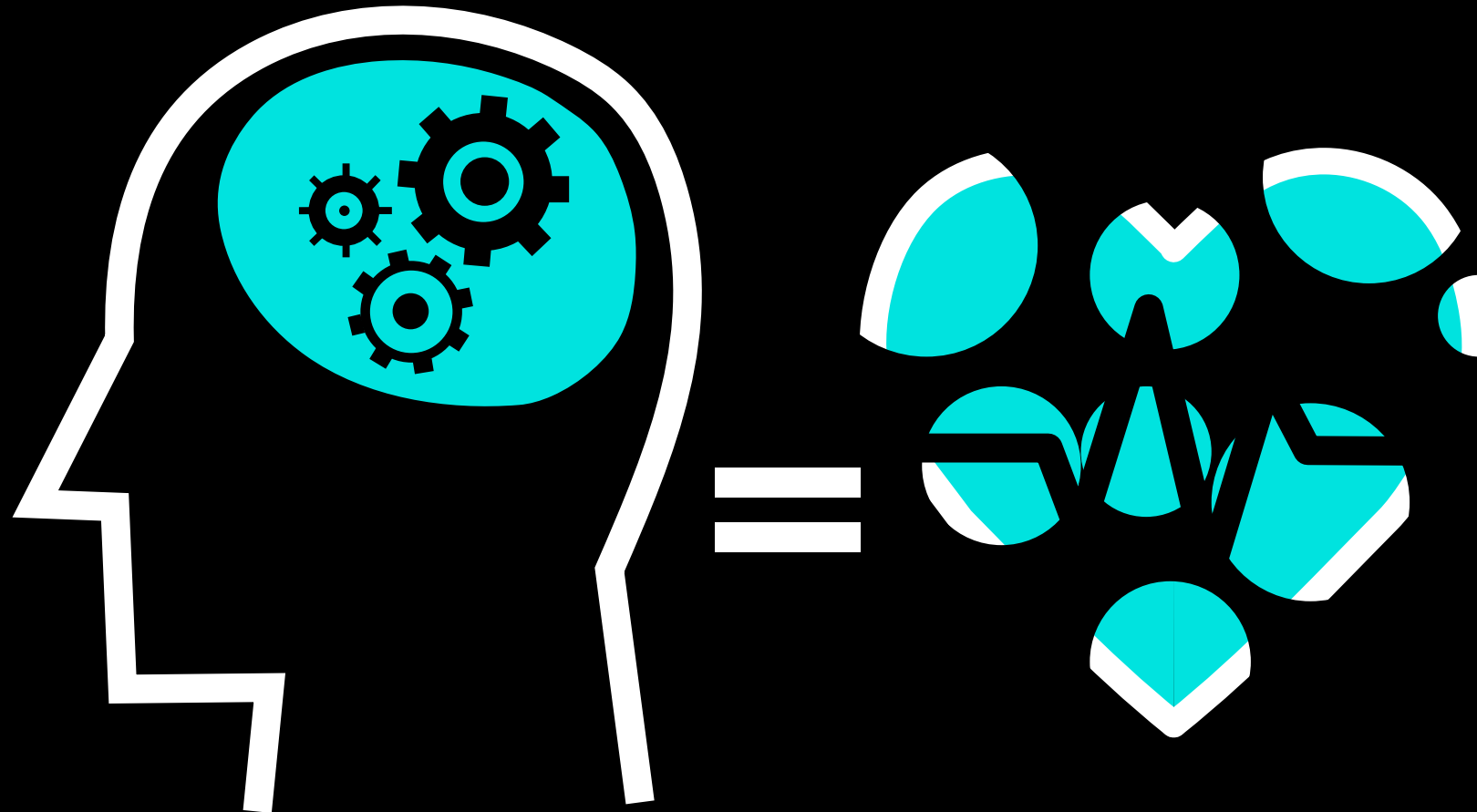
Between running themselves ragged at work and anticipating their impending burnout, YAYA employees need definitive ways to keep their momentum going. That is where mental health action and self-care come in. Unlike previous generations who served primarily as concerned bystanders, the YAYA demographic tries to actively care for themselves. They place great value on committing time to themselves to balance out the dedication they have in every other aspect of their lives.



Despite constant news stories and endless social media posts alerting this age group to the dangers of everything from vaccines, to debt and even technology, YAYA consumers believe that mental health is the most damaging issue facing their generation. When surveyed, this demographic ranked it No.1 — higher than electronic cigarettes, opioids, alcohol, cigarettes and marijuana.³

Clearly, YAYA consumers think mental health is important, but they do more than think – they act. In fact, 81% of respondents believe seeing a therapist for mental health is the same as seeing a doctor for physical health.³

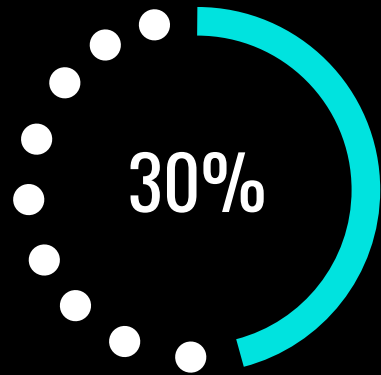
YAYA consumers are redefining what health means. They look at both physical and mental health as integral parts of taking care of their whole selves. This holistic care approach extends to both the personal and professional aspects of their lives.



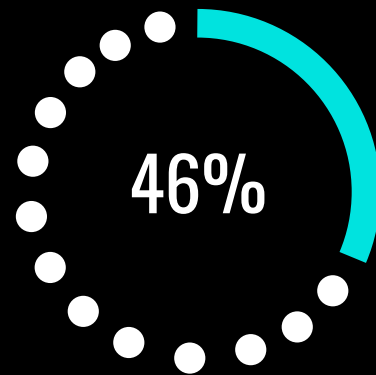
Ninety-one percent of respondents agree that employers should recognize mental health as a valid reason to use a sick day, and 84% agree that employers should offer paid days off for mental health in addition to sick days.³

Mental health days are just one way YAYA consumers are championing personal care for mental health and taking a stand to create space for it in their busy lives. Proactive self-care also plays a huge role in YAYA individuals' dedication to mental health.

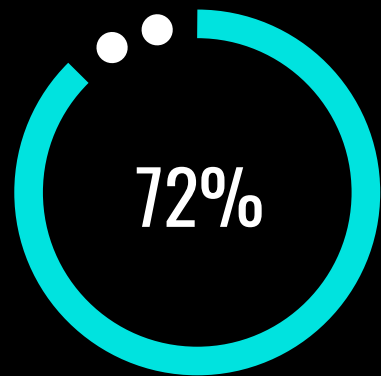
HOW OFTEN DO YAYA CONSUMERS PARTICIPATE IN SELF-CARE ACTIVITIES?



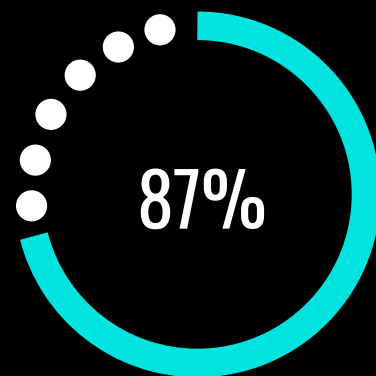
PARTICIPATE IN SELF-CARE ACTIVITIES EVERY DAY



BELIEVE THEY SHOULD PARTICIPATE IN SELF-CARE ACTIVITIES EVERY DAY



PARTICIPATE IN SELF-CARE AT LEAST ONCE A WEEK



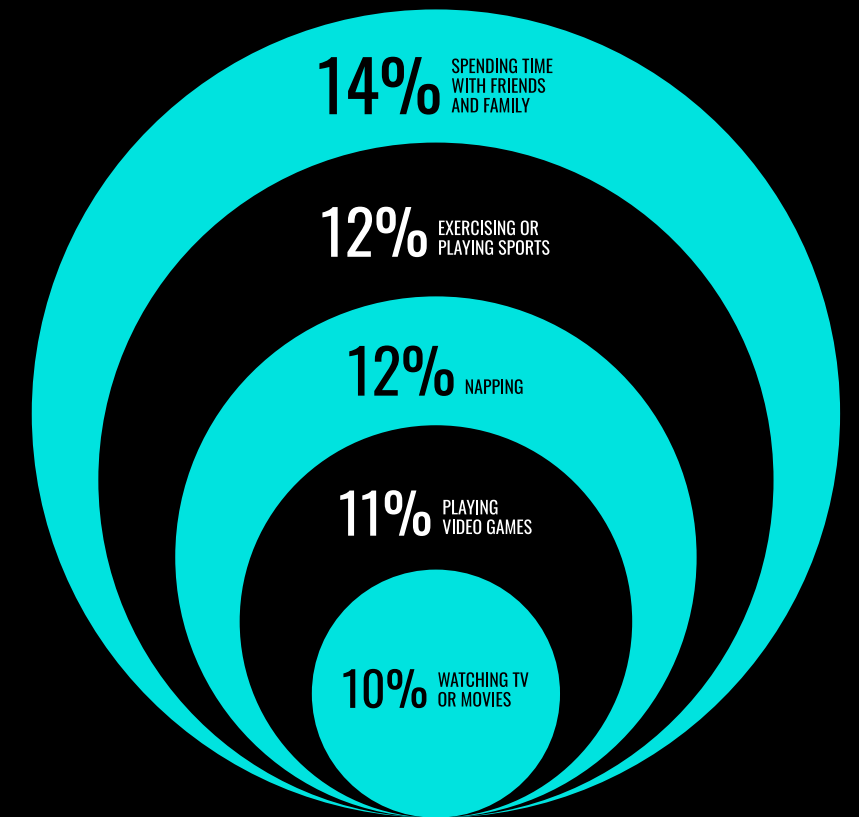
BELIEVE THEY SHOULD PARTICIPATE IN SELF-CARE AT LEAST ONCE A WEEK

In recent generations, there has been increased awareness surrounding mental health, but YAYA consumers are known for actually taking action. Eighty-eight percent of YAYA consumers believe they should participate in self-care activities at least once a week, and 72% are actually taking the time to meet that goal.³

This emphasis on self-care is not without adversity. In fact, 77% of respondents said that they struggle to balance having time for themselves and working hard.³

YAYA individuals are defining self-care in their own ways based on what works best for them. That's why their favorite forms of self-care are easily built into their lives. These activities include spending time with friends and family, napping, exercising, video games and spa treatments (at home or at a spa).³

SELF-CARE ACTIVITIES



**YAYA CONSUMERS ARE PUSHING
THROUGH FINANCIAL ANXIETY**

**TO PAVE THE WAY
FOR A NEW ERA OF FINANCE.**





YAYA consumers are just getting accustomed to adult life. With this new phase of life comes bills, loans and credit cards while entering the daunting world of finance. Though YAYA consumers feel these challenges looming, they are confident they are equipped with the tools to handle them. However, they're not in a rush to actually put their skills to the test.

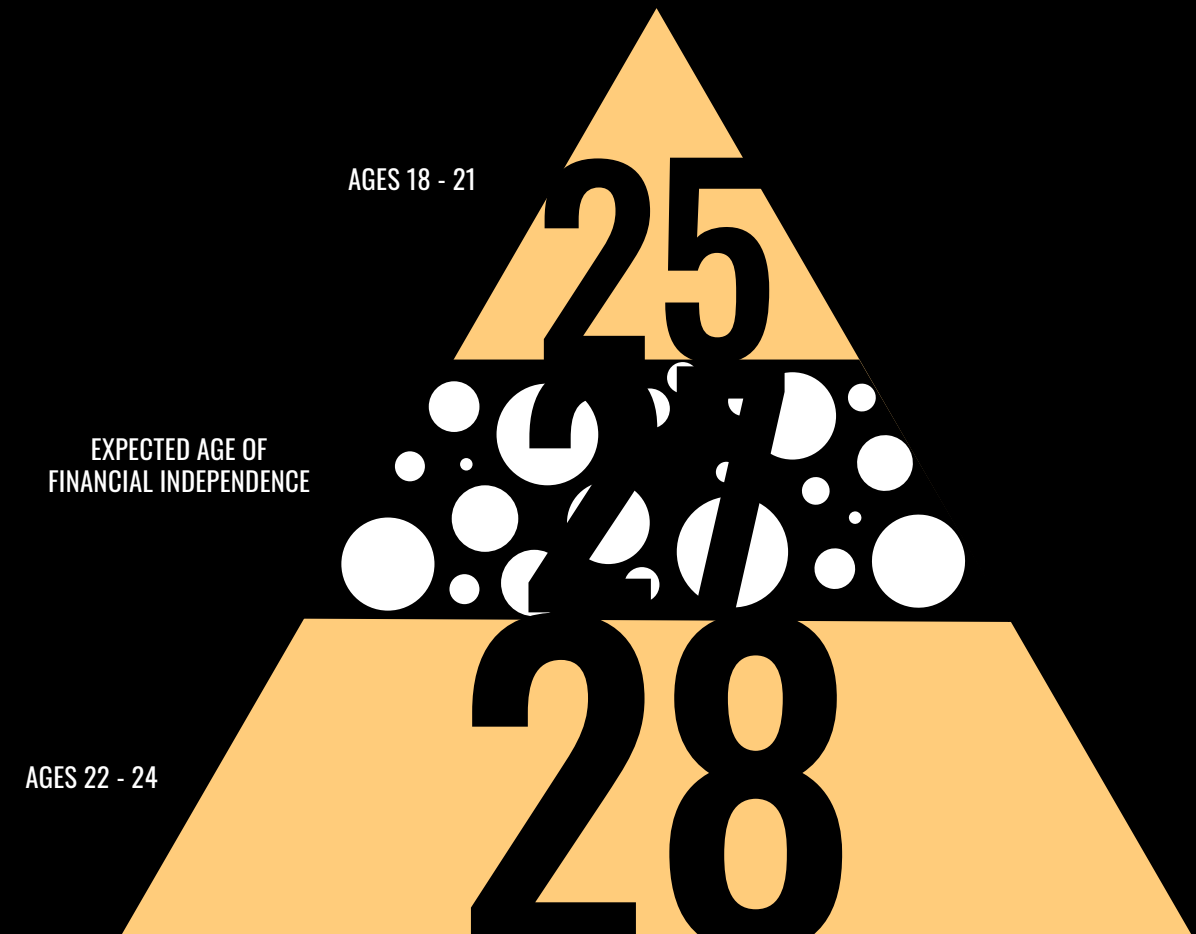
This demographic is still transitioning into being independent. They are growing into themselves personally and professionally. However, when it comes to their finances, they are a little more hesitant to leave the nest.

Our research showed that YAYA consumers expect to be financially independent from their families at 27, although that number varied depending on the age of the respondent.³ Younger YAYA consumers, age 18-21, tend to be more optimistic. They anticipate financial independence by age 25, whereas older YAYA consumers, age 22-24, don't expect to be financially independent until they turn 28 years old.³

A 2019 report by the Pew Research Center indicated that a majority (64%) of Americans think young adults should be financially independent by 22 years old. However, only 24% of people age 22 and younger can actually be considered financially independent.¹²

Therefore, financial independence may be somewhat of an illusion for this age group. Debt and the high cost of adulting may mean it will take longer for YAYA consumers to achieve the financial freedom they desire and require. Finding that extra time involves extended reliance on their families.

AVERAGE EXPECTED AGE OF FINANCIAL INDEPENDENCE FOR YAYA CONSUMERS...

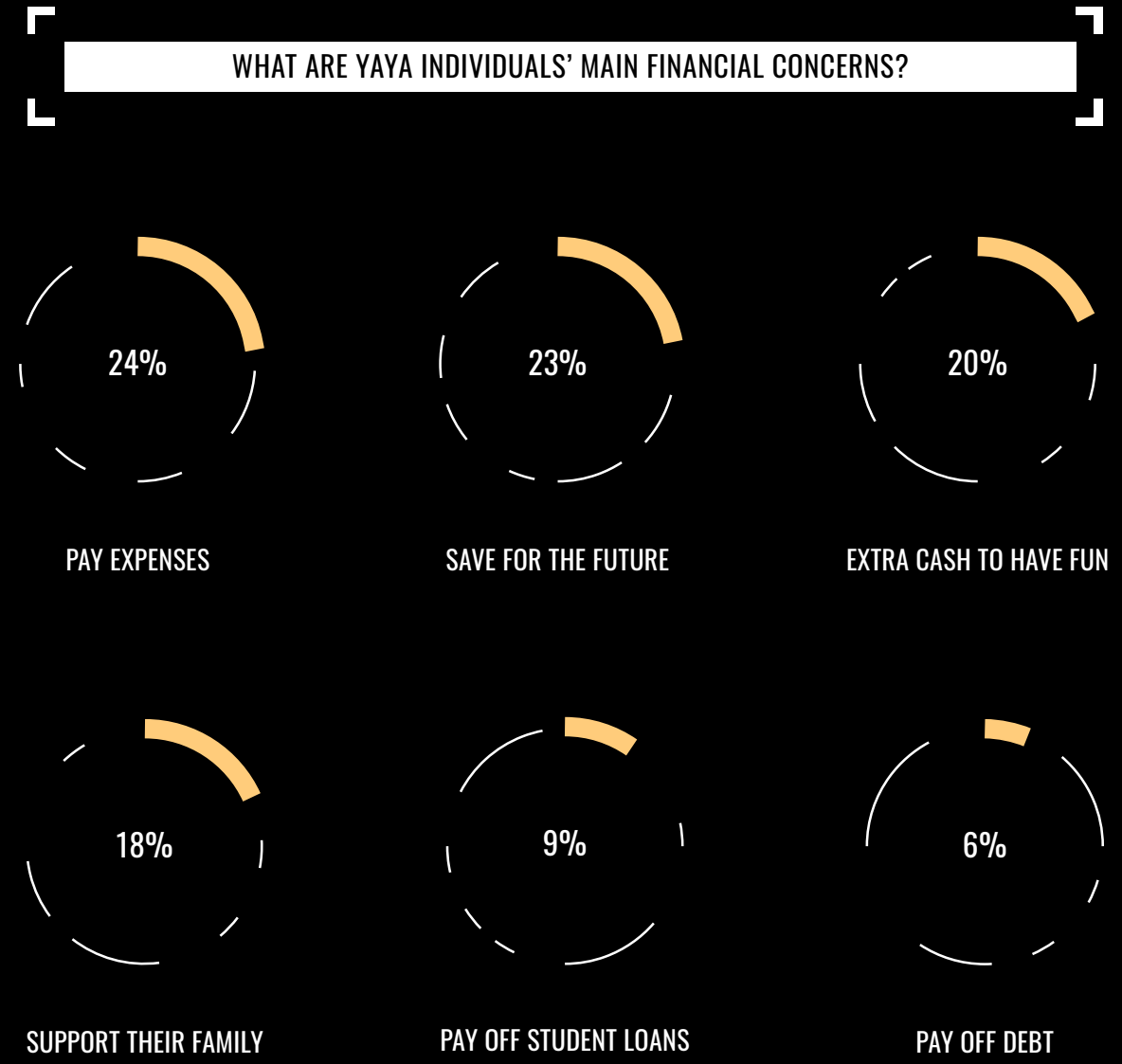


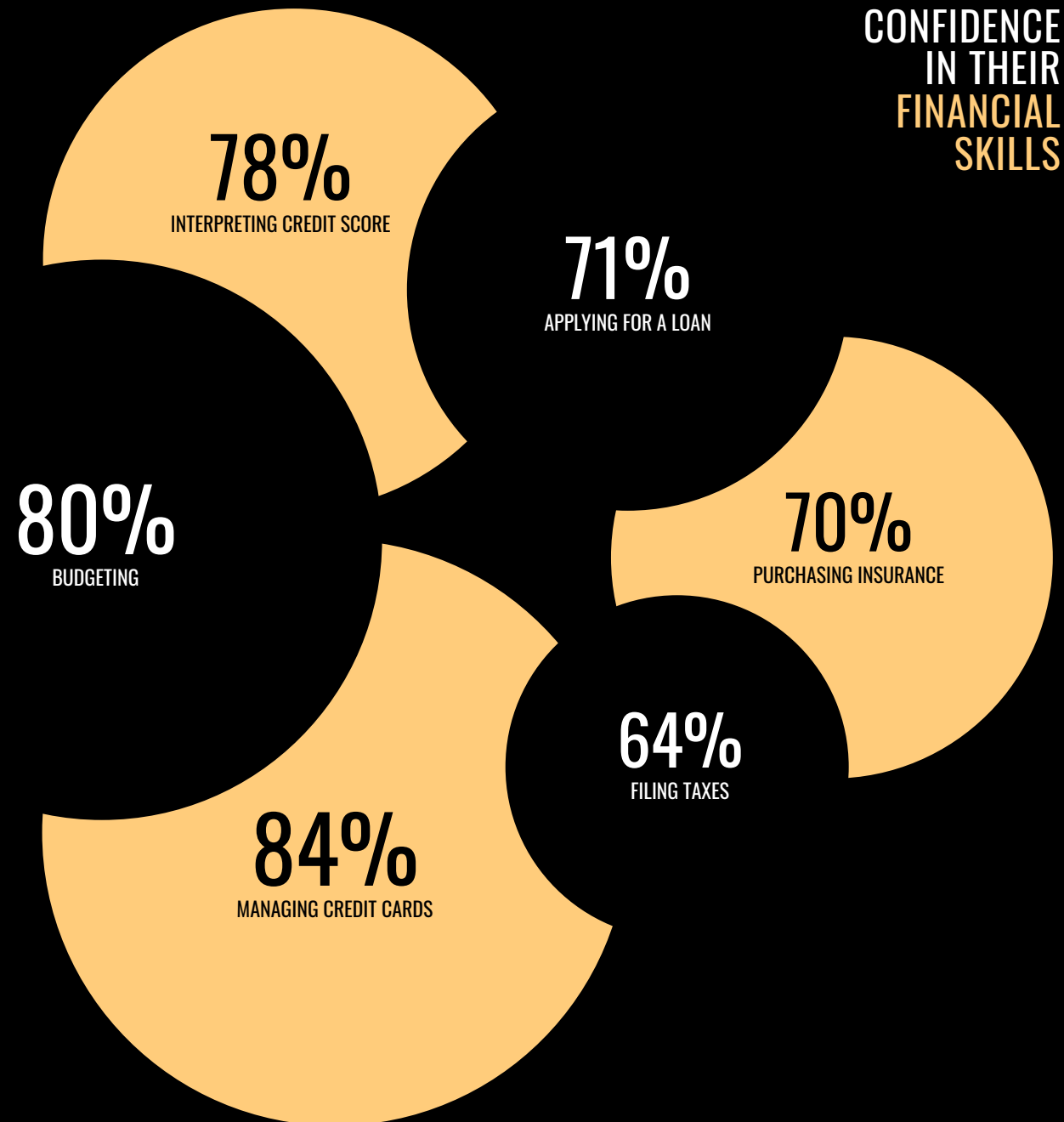
According to the 2019 Merrill Lynch Age Wave Survey, 70% of young adults (18-34) have received financial support from their parents in the past year, and 58% said they could not afford their current lifestyle without it.¹³ Our respondents said this familial support primarily goes toward groceries/eating out, rent/housing, utilities, education and insurance. The security the YAYA audience feels knowing their family is there for them when needed means they can take their time finding their way.

Another reason why this demographic continues to push off this complete financial responsibility is because it is a significant stressor for them. They are overwhelmed by all that this independence entails.

For now, YAYA consumers are hyper aware of their current state of finances with 75% checking their personal banking account multiple times per week and 46% checking it at least once a day.³ However, as long as their accounts are not in a deficit, they believe that they are OK financially. Our respondents reported their main financial concerns are paying expenses, saving for the future and having extra cash to have fun.

Extra cash is key. Though this age group is worried about their current and future finances, they prioritize enjoying the moment. Their attempt to have it all and support the lifestyle they want is another reason why they continue to push off their expected age of financial independence from their families.





Though their finances cause them stress, YAYA consumers are confident in their skills. They believe in their ability to budget, file taxes, manage credit, apply for loans and purchase insurance.³

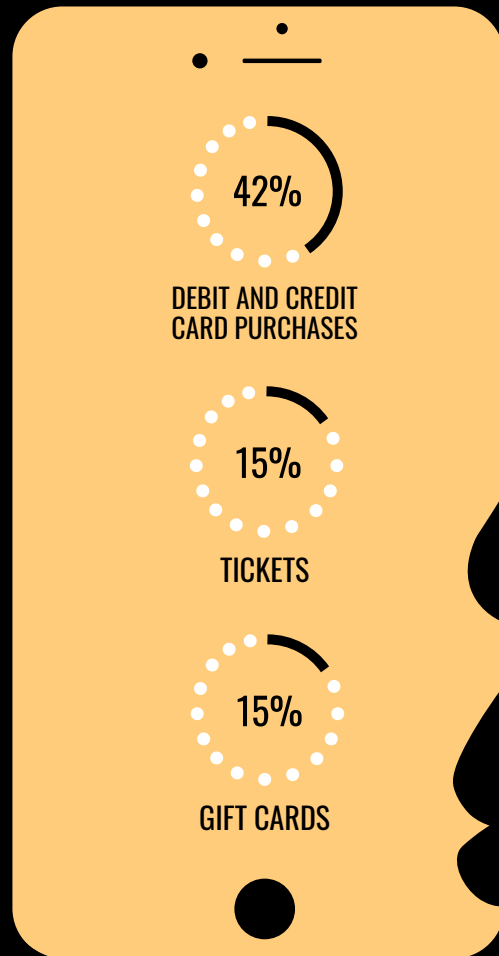
YAYA individuals are confident in their ability to build a strong financial future for themselves, but there are no clear instructions as to the timing of those steps. This leads these consumers to create their own, individualized financial paths as they go.

Despite 84% of respondents feeling confident in their ability to manage a credit card, 34% of our respondents do not have one.³ There is a disparity between this group's financial confidence and their financial realities. Although those

in the YAYA market have the confidence, it isn't being put into practice as they go about their lives.

According to Bloomberg, this age group is more debt conscious as a result of growing up during a recession.¹⁴ They are more hesitant to take on debt than their predecessors, especially since many already have unprecedented student loan debt if they have received higher education. A Pew 2015 report showed that 41% of Millennials have student debt compared to 26% of Generation X, 13% of Baby Boomers.¹⁵ This has led YAYA consumers to be wary of applying for loans or credit cards for fear of getting trapped in the financial woes they saw around them growing up.

WHAT DO YAYA CONSUMERS
USE DIGITAL WALLETS FOR?



The ease of using apps and online banking systems allows YAYA consumers to be proactive in getting information on their financial status.

This demographic is also beginning to take advantage of alternative payment methods and digital wallets. A digital wallet is a “wallet” that lives on a mobile device instead of in a consumer’s back pocket. It allows consumers to store debit and credit card information on their phones to make payments in store. These wallets go beyond payment functions by also storing boarding passes, concert or event tickets, reward cards and more.

YAYA individuals are more likely to embrace digital wallets than other demographics, with

48% of our respondents reporting that they use digital wallets.³ That is a much higher number compared to 37% of 45- to 54-year-olds who use digital wallets, according to a 2018 Merchant Machine study.¹⁶ Beyond the digital wallet, YAYA individuals are utilizing other payment technology such as Apple Pay, CashApp, Paypal and Venmo.

Though YAYA consumers are known for embracing new technology related to payments and banking, they are still hesitant when it comes to cryptocurrency. For example, 54% of respondents said that they are unlikely to use cryptocurrency.³ Of those, 28% said that they are extremely unlikely to use it.³

SEEING CLEARLY

As you can see, the YAYA market is clouded in misconceptions. Sometimes, we have to look from different angles to see the full picture.

But those who work to see this demographic Under No Illusion will also see the benefits. Looking beyond initial perceptions of YAYA individuals to build true, meaningful relationships will change the way you work with and learn from them moving forward.

To stay relevant with YAYA consumers, it is important to continue to evolve and learn alongside them. There will always be new truths to uncover, but understanding their core beliefs ensures that you are always seeing them in totality.

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NOW THAT YOU'VE SEEN THEM,
YOU CAN'T UNSEE THEM.



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