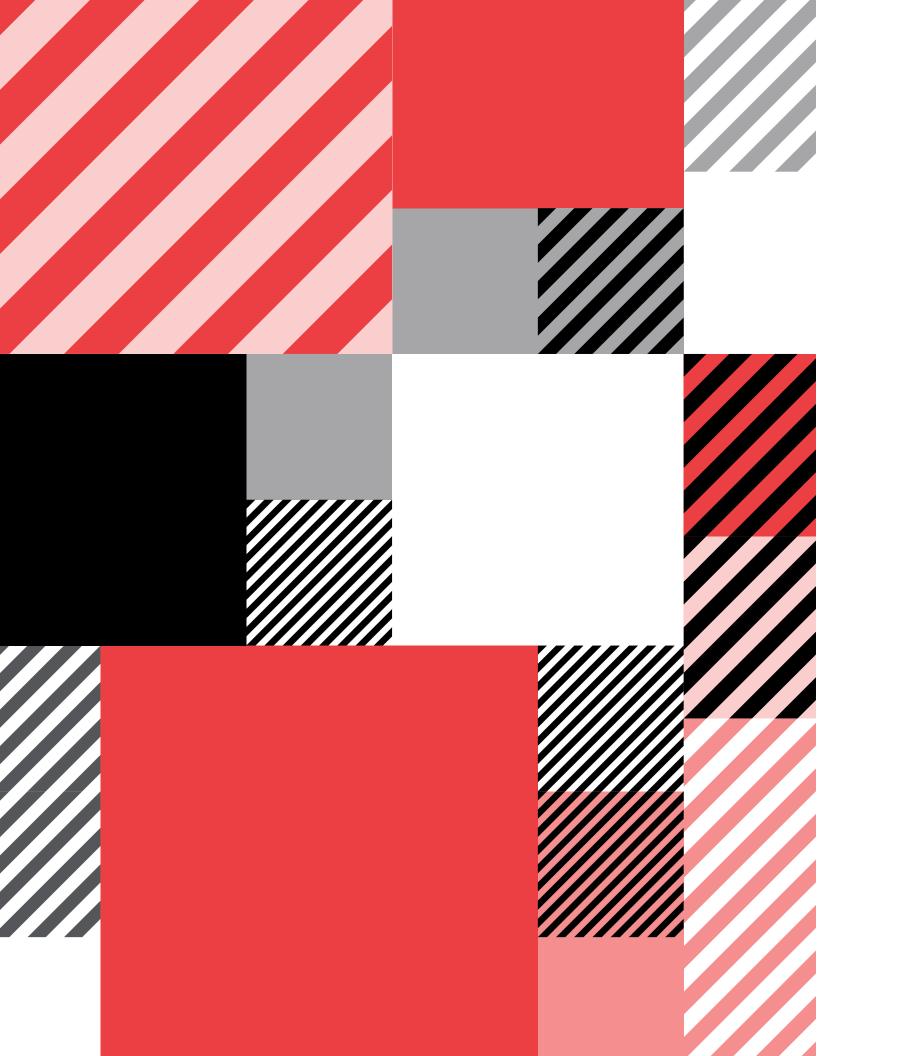


Brand Is What You Share, Not What You Sell

EMBRACING CO-CREATION AT ALL LEVELS: A GEN Z GROWTH PLAYBOOK

Ogilvy CONSULTING



How to build lasting bonds with Gen Z

FOREWORD

On August 23rd, 2022, The Associated Press reported that progressive activist Maxwell Frost, one of the first members of Generation Z to run for Congress won his Democratic primary. At just 25 years old he's now poised to become the first Gen Z member of Congress. The political novice hasn't finished college and drove for Uber while campaigning. "I'm the first; I'm definitely not going to be the last" he told Axios. Everyone seems to have an opinion on Gen Z.

In many ways, this cohort reflects, and often drives, the pluralities of today's world. Altruistic, yet indulgent. Disruptive, yet nostalgic. Ambitious, yet anxious. Selfmotivated, yet lonely. But so much has already been written about Generation Z, so this is not a report on demographics, basic generational differences, or recycled considerations for brands.

This is a playbook on how to build lasting bonds with Gen Z. One thing we do know is that Gen Z impacts culture at a speed and scale through both individual and collective digital action. In many ways, they aren't just the next consumer group, they're a new kind of relationship. Their connectivity and ability to build allows for greater immediacy and intimacy. And, by 2031, their income will reach \$33 trillion, surpassing that of millennials (CNBC). In Part 1 of the Playbook we introduce our POV, the shifts brands need to achieve change, and the community building structures required to make it all happen.

We've conducted new research and sat down with brand leaders from across the globe in working sessions to craft a playbook that addresses these shifts. In its most basic form, we propose that business leaders must grow comfortable co-creating and giving up complete ownership to gain the next—and largest—generation of potential new users. Such radical decentralization of brand control will likely change business models and internal team dynamics - the cost of entry for winning with Gen Z.

At Ogilvy Consulting we are always looking at what's next, for consumers for businesses and brands. We work with our clients to build their brands, innovate new products and grow their business through a deep understanding of the current and future consumer. Gen Z is the future consumer, innovator and creator...and the future is now.

Please enjoy this first of our two papers authored by Global Consultant (and Gen Zer!) Reid Litman, and reach out if you'd like to learn more.



CARLA HENDRA Global CEO Ogilvy Consulting







Gen Z is the largest, most diverse, and most geographically

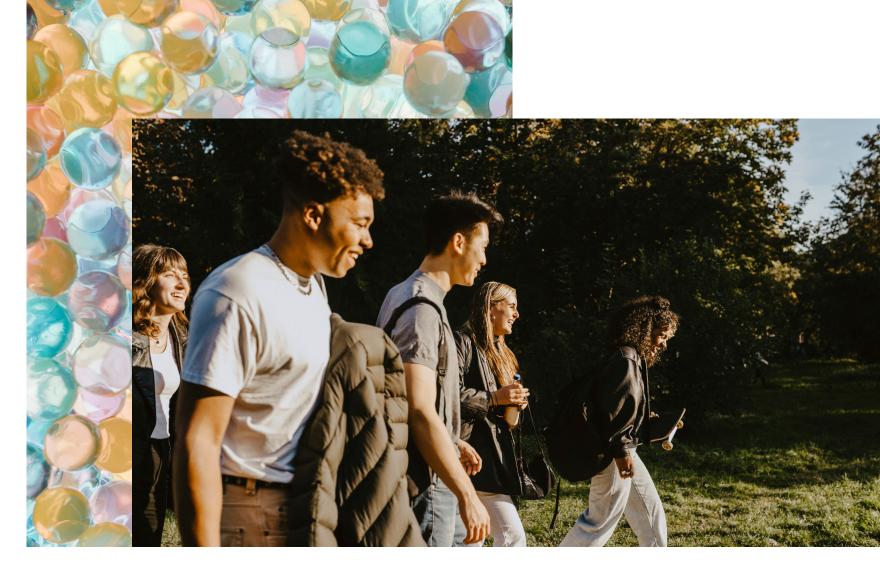
untethered cohort in history. Gen Z now makes up 40% of all global consumers and holds earnings of about \$7 trillion (Bank of America Research). By 2031, their income will reach \$33 trillion, surpassing that of millennials. Gen Z is on its way to claiming the greatest purchasing power and connectivity the world has ever known. And while every generation has sought to mold the world in its image, Gen Z is doing so through both individual and collective digital action.

Gen Z's connectivity allows for greater immediacy and intimacy, making it easier for Gen Z individuals—not just the roar of Gen Z itself—to be heard. Within this cohort, people value radically different things, at different times, from different sources. This means that as Gen Z continues to amass economic and cultural influence, brands must decide which unique interest points and needs to focus on to build trust and achieve impact with their target users. Above all, to win with Gen Z, brands must be willing to share: share their brand, share their resources, and share their future.

Our research reveals that, more than any previous generation, Gen Z wants to be

involved in the ideation and curation of culture-led *participatory* moments with the brands and people they care about. In order to build a lasting bond with Gen Z, you will need to become *a brand that shares*: **one which not only allows for, but has in place, a digital and physical infrastructure which encourages youth to co-create and help shape the direction of the business at all levels.**

This requires proactively galvanizing Gen Z to collaborate on shaping your brand and the impact it creates in the world—from brand purpose to community management and user support, and everything in between. Sharing is about co-creating a continuous value exchange for both parties; at its best, Gen Z now makes up 40% of all global consumers and holds earnings of about \$7 trillion



sharing engages Gen Zers in shaping what the brand means to them, while the brand itself grows into something new.

We've conducted dozens of culturalmaven interviews with participants of all ages and interests, surveyed 1,000-plus Gen Z consumers in the US and UK, and sat down with brand leaders from across the globe in working sessions to craft a playbook on implementing this winning concept of *sharing* and thereby building stronger, lasting bonds with Gen Z, the group everyone seems to have an opinion on. You will see key quotes, survey insights, and questions from our research throughout this playbook. When asked, "If compensated, would you be interested in offering feedback on the creative process, product development, or strategic planning of your favorite brands?" 92% of Gen Z were very interested, with 43% responding with a resounding 10 (definitely yes!) on our scale of 0–10.

OGILVY AND THRED MEDIA GEN Z SURVEY, MARCH 2022

WINNING WITH GEN Z ISN'T ABOUT BRAND MANAGEMENT AT ALL

The business case for sharing: opportunity for brands to rethink their strategies to include Gen Z

Sharing and co-creation have long been associated with a narrow definition of sourcing product ideas (e.g., "Vote on the next flavor!"), feedback from existing customers, or launching creative campaigns with celebrities or popular influencers. However, becoming a brand that shares requires a much wider scope of the word and a much more integrated investment. Through this new definition, firms can create novel relationships, customer experiences, and wholly new product categories, as well as avoid costly market missteps. THE BUSINESS CASE FOR SHARING: OPPORTUNITY FOR BRANDS TO RETHINK THEIR STRATEGIES TO INCLUDE GEN Z WINNING WITH GEN Z ISN'T ABOUT BRAND MANAGEMENT AT ALL

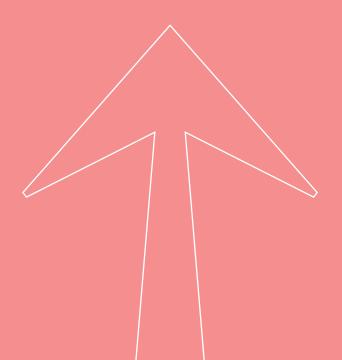
BRANDS THAT SHARE OFTEN BUILD YOUTH AFFINITY AND RELATIONSHIPS MORE QUICKLY

Today, over 66% of Gen Zers say it's important for companies to value their opinions. Brands who want to win with youth should mine Gen Z's creative impulse through mutually beneficial collaboration, as opposed to viewing Gen Zers simply as customers to serve. And Gen Z's desire for co-creation goes far beyond traditional product innovation; 85% of respondents under age 30 say they are interested in "sharing my ideas and experiences with companies to help them develop better solutions to social and environmental problems," compared to 75% of those over age 30 (Pew Research). Consumers are far more positive about a brand (and are more likely to promote it) if they participate in co-creation, and are more likely to stay loyal to a brand, a key business challenge surrounding Gen Z consumers.

According to the National Retail Federation, "A key element in attracting and retaining Gen Z is understanding their desire to contribute-44% of respondents said that, if given the opportunity, they would like to submit ideas for product design and 43% said they would like to participate in a product feedback session." However, when asked whether they received a response from brands they reached out to, 48% of Gen Z said they either didn't get a response at all or that they were unsatisfied or neutral about the response they received, leaving tremendous opportunity to involve and improve brand interactions and relationships with Gen Z.



of Gen Z would like to submit ideas for product design.



"I love the provocation. I think this new, larger definition of sharing is key among this highly involved, highly differentiated Gen Z audience."

SENIOR VICE PRESIDENT, MAJOR LIFESTYLE AND APPAREL BRAND

BRANDS THAT SHARE ARE OFTEN BETTER PREPARED FOR CHANGE AND SUCCESSFULLY DRIVE CULTURE

Increasingly, there is an expectation among Gen Z of not just two-way communication, but active involvement with brands. A recent study from the National Research Group found that 90% of Gen Z respondents said they were excited about participating in interactive brand experiences, and 42% indicated they want to participate in online brand events. Gen Z is looking to engage and create with brands that understand and embrace their "creative language" and provide opportunities for self-expression and impact, both virtually and IRL. Brands should embrace the switch from talking with Gen Zers to partnering with them to build lasting relationships.

THE BUSINESS CASE FOR SHARING: OPPORTUNITY FOR **BRANDS TO RETHINK THEIR** STRATEGIES TO INCLUDE GEN Z

BRANDS THAT SHARE OFTEN GAIN A TALENT ADVANTAGE

Co-creation can help to define new avenues for research, gain access to future technology users and attract new sources of funding and talent. Seventyfive percent of employees consider brands that co-create more innovative. Brands that include young people in their planning can also benefit from the communities and buzz built by users, which in turn attract more talent. And as McKinsey found, "While some employees are of course motivated by money, more Gen Z actually get involved with organizations as a way to express their interests and values." Gen Z individuals are looking to work in organizations that mirror their sense of purpose and personal brand, which oftentimes requires collaboration both inside and outside company walls.

ERIN MUNTZERT, INSIGHTS AND INNOVATION LEAD AT GOOGLE, OGILVY AND THRED MEDIA INTERVIEW, MARCH



BRANDS THAT SHARE OFTEN INSULATE THEMSELVES FROM **MASSIVE COMPANY OR PRODUCT MISHAPS**

In traditional innovation cycles, brands drop long-awaited products or campaigns with their breath held, hoping the product (sometimes well tested, other times not) resonates with the world around it. This traditional "develop-perfect*test–release–accept result*" process is risky, slow, and ever more costly with Gen Z, especially as 80% of youth have reported changing their minds about a purchase after reading negative social news. Brands must be keenly aware that Gen Zers are far more likely to boycott unsustainable brands (and announce that to the world) than their predecessors. According to a Marketing Society survey, 40% of Gen Z would boycott a brand, compared with just 16% of millennials.

Conversely, brands that share are largely protected from major misalignments because they ideate, build, and drop in public, alongside their community of users. With this model, brands are in a consistent exchange with stakeholders and reserve the right to continuously iterate releases until both parties are satisfied. Working directly with users allows brands to edit products and campaigns even after they have launched as the world changes around them-more like an iterative cycle than a blind release. Rather than being feedback-anxious, brands that share are feedback-oriented, leveraging their community to help define goals, make necessary adjustments, select influencers/representatives, and co-create the product roadmap.

shifting towards SHARING SHARING SHARING

enabling impact, not just creating it



SHIFTING TOWARDS A SHARING MINDSET: ENABLING IMPACT, NOT JUST CREATING IT

Gen Zers are hyperconnected individuals, inherently comfortable expressing themselves through digital creative tools. Valuing creativity is a core belief among many of them. Over half of Gen Zers stated that they believe they're more creative than previous generations, and they uniquely describe creative pursuits as essential, meaning they don't see creativity as a side outlet but rather as a core attribute of daily life (*USA Today*). In the digital age, creative expression is seen as vital to successful relationship building, self-realization, and, increasingly, the ability to make a living. This creative emphasis fuels Gen Z's distinct desire to share and be involved with the brands they interact with at all levels.

As part of the drive to start thinking of Gen Z users as co-creators, you may need to reframe your brand's own role in the relationship, from sole fixer with all the answers to collaborative facilitator and creative partner. Sharing your brand at all levels means your brand is less a finished, perfectly defined character and more of a growing co-star, supporting youth in their own ambitions and individual purposes. You'll need to think of co-creation as an ongoing process for Gen Zers to help shape your brand offerings around their own goals. So, while your own brand purpose will certainly be critical to growth, so too will providing tools and opportunities to Gen Zers that allow them to make their own purposes known to the world.





When asked whether "brands understand and share their beliefs or behaviors today," only 29% of surveyed Gen Zers believed brands truly understood them.

OGILVY AND THRED MEDIA GEN Z SURVEY, MARCH 2022

GENZBRANDSDON'T WORK LIKE THIS





Traditional brands operate in **fixed categories,** relying on familiarity and **slower, steadier innovation cycles**

Every brand that shares has one thing in common: a community with which to share. These communities may have wildly different rituals, cadences, and technologies, but they do have a purpose and a group of members who share a common need, interest, or ambition. According to Stanford's Social Sciences Lab, "Community is not a place or an organization, nor is it an exchange of information over the Internet. Members of a community have a sense of trust, belonging, and caring for each other. They have an individual and collective sense that they can, as

Sharing requires a community, and building community means turning customers into partners



 \rightarrow

of your community. We're part of your lifestyle. We want to be uplifting partners on your journey. Not necessarily defining what that journey is or adding rules to the way you interact."

SENIOR BRAND LEADER, FASHION/LIFESTYLE SPACE Y

part of that unique community, influence their environments and each other." A community is *not* a passive audience or list of followers, and it's more than twoway dialogue-it's two-way decisions.

SHIFTING TOWARDS A SHARING MINDSET ENABLING IMPACT, NOT JUST CREATING IT

Making the shift: five imperatives

SHIFT IMPERATIVE 1

BUILD WITH YOUR COMMUNITY, NOT FOR YOUR COMMUNITY

In order for you to become a brand that shares, the community you build should be more egalitarian than hierarchical, with a constant stream of new leaders (both internal and external) empowered to contribute and shape its direction. According to Get Together: How to Build a Community with Your People by People & Company, "Your brand community isn't about your goals or what you can

"We think of ourselves as a participatory experience, versus a spectator one. We don't want you to just sit and scroll alone, we want you to start conversations, reach out to people, and make real connections around the relevant and ongoing things you care about, both online and in person."

JASON KIRK, IRL APP'S CHIEF BUSINESS OFFICER, INTERVIEW WITH OGILVY AND THRED MEDIA, MARCH 2022

"You can't build a community around goals that only serve you."

PEOPLE & COMPANY

do, it's about what the group can achieve together. Your users are showing up to realize a shared vision, not to watch you realize it for them." Focus less on defensively managing your community and more on creating other leaders to help you evolve it. Fostering a community rooted in shared goals and committing to its maintenance is fundamental to sharing and key to longevity with Gen Z.

SHIFTING TOWARDS A SHARING MINDSET ENABLING IMPACT. NOT JUST CREATING IT



EXAMPLES

Roblox, an online game-creation system currently valued at around \$21 billion, was developed alongside its early users, and continues to rely on them today. According to a 2022 interview with CEO David Baszucki in the Harvard Business Review, "When Roblox launched, in 2004, its user base was made up of friends, family, and tech enthusiasts recruited via Google ads to serve as impartial advisers. The idea was simple but ambitious: create an online space where people could do anything—construct buildings, run businesses, battle enemies, play sports, attend concerts—together. Everyone agreed that user-generated content would be the key to making the platform great." The Roblox team thinks of its users not as customers but as co-visionaries who deeply engage in the kinds of experiences they want on the platform.

The Bowery Showroom, an NYC-based

retail concept store founded in 2019 and recently featured in Meta's list of innovative small- and medium-sized businesses, not only sells the latest streetwear and brand drops (from Chrome Hearts to aspiring local artists) but also doubles as a physical content studio for young social media creators, artists, and influencers with all manner of creative expression-music, fashion, NFTS, and vlogs—to hang out and create content / execute brand sponsorship deals. In the last six months, as Bowery Showroom's social channels have grown, the space has become a hub for NYC creators and cultural figures. In pairing retail with a social club and content studio, 25-yearold founder Matt Choon has his Gen Z target audience on hand 24/7 as they make decisions about which products to stock and which brands to partner with.

SHIFT IMPERATIVE 2

HELP GEN Z NAVIGATE THE NEW EDUCATION AND EMPLOYMENT LANDSCAPE

Some brands are already supporting Gen Z by developing and providing educational or skill-building content, access to training courses, business resources, or other partnership and learning opportunities. These developmental offerings are aimed at everyday youth, new entrepreneurs, and creators of all levels. For example, Depop invites regular sellers to its six-week Level Up course, and its top sellers to a private community of advisors and peers. The platform also helps "bridge the gap between Gen Z and mainstream fashion by matchmaking up-cyclers with global brands and influential Gen Z" (Vogue Business).

Gen Z is acutely aware that many industries will continue to be disrupted by automation and cultural changes on top of a quickly emerging gig economy that places emphasis on self-employment and demand-based (freelance) work. In a gig economy, temporary, flexible jobs



are commonplace, and companies tend to hire independent contractors and freelancers instead of full-time employees. These trends put the traditional employee expectations of job security, health benefits, and paid vacation time at risk. But it's not just the benefits youth are losing; it's the consequent risk they take on, having not been trained for the ensuing level of hustle needed to survive, let alone thrive, in the new employment ecosystem. Statistics suggest that 50% of the US workforce will be gig workers by 2027 and that the gig workforce is growing three times faster than the traditional workforce (Bank of America).

Many schools and universities are *not* preparing students for these big, sweeping changes, nor are they even currently offering clear economic returns to students upon graduation. As a result, Gen Zers are adding to their formal education or replacing it altogether

by attending virtual classes, enrolling in apprenticeship programs, earning online certifications, downloading startup-focused apps, or connecting with peers to share knowledge and pool skills in an effort to support one another. The private sector is now coordinating to supply some of this critical, nonsyllabus-focused content; many tech companies are placing emphasis on apprenticeship opportunities that consider real-world changes in the job market and offer pragmatic, usable skill-building opportunities as well as coaching and professional networking.

Other digital destinations such as Skillshare, MasterClass, YouTube, Coursera, Udemy, and LinkedIn Learning provide users with tutorials, advanced software and design skills, interview techniques, pitch deck building, and a whole lot more to get young people started. The movement toward democratized education will broaden and accelerate in the coming years, opening up a greater variety of opportunities for young talent, as well as huge new opportunities for brands to build deeply loyal communities by supporting youth in their learning and development.

When asked if they "would like to see brands offer more upskilling, education, and personal finance courses through their membership/loyalty programs," 79% of Gen Z answered "Yes."

OGILVY AND THRED MEDIA GEN Z SURVEY, MARCH 2022 SHIFTING TOWARDS A SHARING MINDSET:



Education and enrollment

There are 1.2 million fewer students enrolled in US colleges today compared to fall 2019. Overall, enrollment in undergraduate and graduate programs has been trending downward since around 2012, but the pandemic turbocharged the declines at the undergrad level, where student numbers have fallen by 6.5% in the last two years (CNBC).

Don't just help Gen Zers move up;

help them move on: Mental health awareness and destigmatization have played a pivotal role in the lives of Gen Zers, which translates into an expanded definition of personal and career achievement. Accomplishments are no longer characterized only by institutional successes such as being a team or house captain, a 4.0 student, or a club leader. Instead, many Gen Zers believe achievement is also realized via independent means—starting a blog, writing an independent report, organizing fundraisers, or starting a podcast. Gen Zers are focused more on stabilizing, avoiding risk, moving away from toxic situations, and finding a healthier state. Moving on is the priority, instead of getting ahead of peers. Less self-imposed pressure to perform in line with expectations has afforded Gen Z a new type of freedom of expression and the chance to be fluid in thought and identity without worry about judgement. This has resulted in Gen Zers owning the contradictions that come with their newfound comfort zones.

MAKING THE SHIFT: FIVE IMPERATIVES

SHIFT IMPERATIVE 3

EMPOWER EMERGING SOLOPRENEURS AND THE **CREATOR ECONOMY'S RISING MIDDLE CLASS**

Over the past 24 months, no cohort has seized the opportunity to reinvent themselves more than the global Gen Z creator community. Creators (anyone who creates and directly monetizes their own content) went into overdrive during the pandemic, with more time to discover, experiment and commit to developing their passions. Gen Z is also the fastestgrowing user segment on LinkedIn and makes up a larger portion of the platform's advertising network than those 35+ (LinkedIn). The combination of social platforms, website- and content-building apps, and creator monetization programs has been the biggest gift to this growing number of "solopreneurs." And according to Shopify, the pandemic spike was no blip: "While 2020 saw a jump in new creators, it wasn't a one-time spike. A year later, creators are still coming online at a record clip: the number of creators is up a whopping 48% year-over-year" (Shopify). Discounted digital tools, faster networks,

and free apps for everything from editing videos to dropping merch and recording podcasts have democratized the chance to be heard (and paid); all kinds of niche outputs are finding an audience.

"A startup is an

HUGO AMSELLEM, ARM THE CREATORS

organization that

scales. A creator is an individual that scales.

It's the same DNA."

In an age where 76% of consumed social content is creator made, brands should support the burgeoning class of Gen Z creators, who see themselves as less of a simple distribution channel for brands (à la traditional influencer marketing) and more as online peers, producing increasingly popular content and impact of their own while helping brands to define and guide their online presence. Even smaller creators will expect brands to help them create and grow by providing the latest tools and platforms to be heard, seen, and compensated on their own terms.

Historically, most creators, apart from major influencers, rarely received compensation for their content; they

SHIFTING TOWARDS A SHARING MINDSET ENABLING IMPACT. NOT JUST CREATING IT





simply used the notoriety of likes and growing follower counts as leverage to source other paid ventures. At a 2022 Adweek event. Reddit co-founder Alexis Ohanian stated that only 12% of creators earn more than \$50K annually. All of that is changing as the creator revolt against the mega media platforms takes center stage. Realizing that their output can command a direct price, creators now want a slice of the more than \$100 billion in advertising revenue or they'll move to smaller media platforms that allow them to capture direct value, such as Substack, Medium, OnlyFans, Roblox, Twitch, and Snapchat.

In a 2021 report, Stripe wrote, "A growing number of creators are earning their living doing what they do best. In the US, the number of creators earning a living wage (>\$69K/year) has increased 41% year-over-year." The unpaid user-supplier model is in rapid decline and at risk of simply becoming a promotional hub for content being monetized elsewhere.

It is critical that you maintain a deep understanding of the changes in Gen Z's employment landscape and career preferences in addition to the rapidly emerging creator economy. Both of these forces are influencing how Gen Zers see themselves,



interact with brands (and each other), and contribute to organizations as members of the workforce.

Brands will need to open new recruiting channels, lose old, tired job qualifications, be willing to upskill both existing employees and freelance consultants, and work directly with the Gen Z talent community to source new hires from diverse backgrounds. Gen Zers want to feel included and equipped with the skills needed to meet the challenges awaiting them in the new economy.

"Creators are scalable friends, educators and retailers; they can take over the markets of loneliness, education, and CPG."

HUGO AMSELLEM, HOW TO INVEST IN CREATORS



EXAMPLE

Tapping into creator communities: Larray's Mac and Cheese

Over the summer of 2021, a popular online creator, Larray, launched a virtual food brand using the ghost kitchen concept. He and his team partnered with DoorDash to release Larray's Loaded Mac and Cheese directly to the doors of millions of fans (old and new). The dish became a viral hit and has spawned several similar projects since.

"We are focused on working with digitalfirst talent by helping them create an ownable virtual dining brand. By tapping into the creator economy, we're not only playing a part in growing the youths' personal brands but also further helping the restaurant industry leverage the digitally native community.'

ROBBIE EARL, VDC CO-FOUNDER, OSR MAGAZINE

MAKING THE SHIFT: FIVE IMPERATIVES

SHIET IMPERATIVE 4

GET COMFORTABLE EXPERIMENTING WITH WEB3

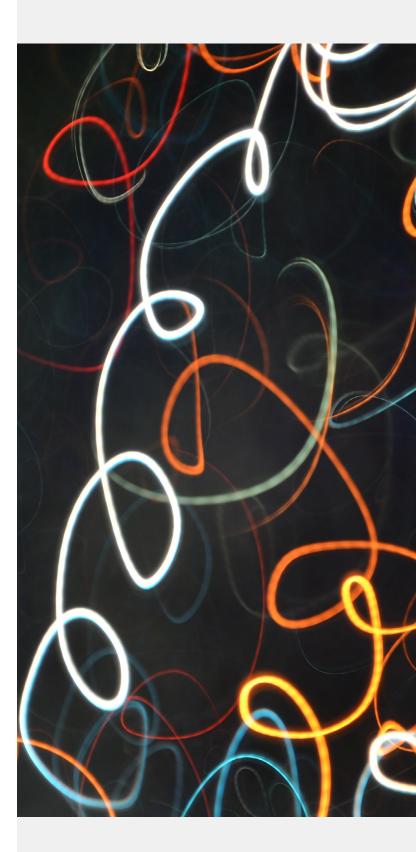
"Perhaps no one is more savvy in the web3 economy than gamers, who have been around since day one. Think about it less as video games and more as a more participatory social media."

AMY WU, PARTNER AT LIGHTSPEED VENTURE PARTNERS

With explosive audience growth in the gaming space during COVID-19 came two significant changes: 1) gaming's platform legitimization, followed by huge growth in the level of investments in purely virtual assets, and 2) significant investment in digital spaces from major nongaming brands and creators, from Prada and Ford to Neymar and Billie Eilish. In turn, these investments allowed virtual platforms to diversify toward more widely appealing entertainment and environments that encourage players and brands to create, collaborate, and share experiences. The popular publisher Riot Games recently created a new internal leadership position, head of player community, to help ensure users are included and celebrated in its evolutionwe expect many others to follow its lead.

It's no coincidence that the biggest virtual platforms today originated in gaming, and topping the list are Roblox, Minecraft, Grand Theft Auto Online, and Fortnite Creative Mode. In addition, there are new platforms: Decentraland, Sandbox, Somnium Space, and Upland, to name a few. They are different from traditional gaming platforms because they allow players to generate realworld income and participate in the growth of a platform's overall valuation. Consequently, there is a growing opportunity for brands to redevelop existing game concepts and creative IP to allow for the use of blockchainbased payouts; Gala Games is doing just that with a reimagination of Zelda.

SHIFTING TOWARDS A SHARING MINDSET ENABLING IMPACT. NOT JUST CREATING IT



Web3 Explainer: According to CNET, "At the most basic level, Web3 refers to a decentralized online ecosystem based on the blockchain. Platforms and apps built on Web3 won't be owned by a central gatekeeper, but rather by users, who will earn their ownership stake by helping to develop and maintain those services. Web3 is the blockchain-integrated internet, one that takes in Web2 (the social media revolution that turned users into creators) but allows users to properly own the content and data they create."

These virtual platforms have now become the see-and-be-seen, culture-inspiring, community-led spaces for Gen Z creators, players, and audience members. Brands hoping to connect and participate in consumer-led experiences should look to gaming (and yes, the metaverse), following in the footsteps of the NBA, Disney, IKEA, Microsoft, and many more.



FAZE CLAN: REDEFINING SPORTS AND COMMUNITY ENGAGEMENT

Few have demonstrated the power of gaming brands better than FaZe Clan, which today looks more like a billion-dollar lifestyle and media empire than like the niche gaming crew it began as. FaZe Clan shows us how deep the intersectionality of gaming, content, community, and brand partnerships can go.

Virtual platforms are now the ideal marketing place for brands to connect, share, and grow with engaged communities of like-minded Gen Zers. Larger than the film and music industries combined, the in-game advertising market

size is expected to grow 20% per year, to \$18.4 billion by 2027 (Technavio). From Animal Crossing's branded islands (Netflix, Net-a-Porter) to customized experiences in Roblox (Nikeland, Vans World Skatepark, Chipotle, Hyundai Mobility), companies will need to work directly with Gen Z to create interactive spaces where users can enter competitions, play games, try on gear, test-drive cars, and participate in experiences. Marketers are used to asking "How does our brand show up on social?"but we'll all have to get used to asking "How does our brand show up on camera?"

McDonald's x Faze'

McDonald's links with esports giant FaZe Clan to spotlight diversity in gaming



Proof you have to lean in both ways (don't just have FaZe talk about you, also do something risky for them . this Twitter name change was unprompted).

WarnerMedia x Faze



How do you ensure after Gen Z is pumped to see the latest Bond?

SHIFTING TOWARDS A SHARING MINDSET ENABLING IMPACT. NOT JUST CREATING IT

INADVERTENTLY CHANGING THE WORLD: GEN Z'S CONNECTION TO THE METAVERSE

A recent study in *JAMA Pediatrics* indicates that teenagers' screen time more than doubled during pandemic lockdowns, from 3.8 hours per day to 7.7 hours. "Through that lens, the Metaverse isn't a radical change at all; it's just a rational extrapolation of this inexorable cultural wave" (Jon Evans, The Walrus). As a result of the increased frequency of new types of digital interactions, the lines between social, gaming, and business across media platforms have blurred. For Gen Z, several aspects are now more comingled than ever: social connections and e-commerce; personal consumption and content production; socializing and entrepreneurship; learning and entertainment.

THE METAVERSE OFFERS OPPORTUNITIES TO ...





Every year, \$54 billion is spent on virtual goods, almost double the amount spent buying music

Approximately 60 billion messages are sent daily on Roblox

Socialize

60R

Source: jpmorgan.com/onyx

When Gen Z was asked whether "brands have Gen Z in mind when creating, designing and marketing products and services," 48% said they did not.

OGILVY AND THRED MEDIA GEN Z SURVEY, MARCH 2022

No longer distinguishing between the real world and the digital world, or online and IRL friends, Gen Z relationships are fluid and, by and large, radically inclusive. Fifty-six percent of Gen Zers are friends with or deeply trust someone they know only online and have never met in person, and almost a quarter of Gen Zers believe that they can trust someone they've met online more than someone they've met in person (Center for Generational Kinetics). The concept of signing on or



GDP for Second Life was about \$650M in 2021 with nearly \$80M paid to creators

Own



Non-fungible tokens (NFTs) currently have a market cap of \$41B

Experience

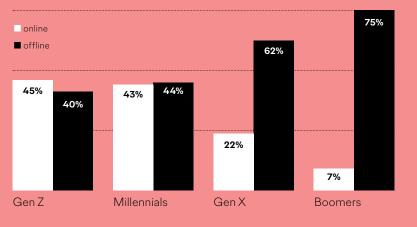


200 strategic partnerships to date with the Sandbox, including Warner Music Group, to launch a music-themed virtual world

SHIFTING TOWARDS A SHARING MINDSET ENABLING IMPACT, NOT JUST CREATING IT

MOST LIKE THEMSELVES "ONLINE," RATHER THAN "OFFLINE"

Where do you feel most like yourself? Percentage of responses by generation.



Source: Consumer Trends survey powered by toluna® The New Consumer | Coefficient

> off is archaic to Gen Zers. For them, what happens online reverberates everywhere, and this always-on mentality is a key ingredient to understanding their identity as true digital natives. Forty-two percent of Gen Zers feel closer to YouTubers than to their school friends (Google, YouTube Generation Study). More and more, Gen Zers want to mirror their daily routines in the digital world. Gen Z is ushering in an era of simultaneous consumption and production of content.

As youth spend more time online doing increasingly meaningful activities and continue to gain influence over which channels matter most in culture, they will expect brands to respect their rules, contributions, and creativity, leading to an ecosystem with more shared ownership and shared development.

EXAMPLE

Metaverse fashion week



#NewProfilePic



adidas Originals and 2 others

EXAMPLE

Bacardí: An example of a brand stepping in to help bolster the





EXAMPLE

BAYC: There is perhaps no clearer

SHIFT IMPERATIVE 5

YOUR COMMUNITY MUST **BE ACTION ORIENTED AND ROOTED IN CLEAR VALUES**

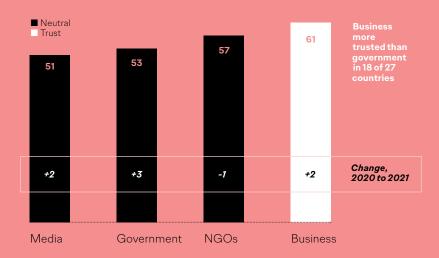
Today, youth movements are mobilizing at extraordinary speeds to overturn discriminatory and harmful systems, but they cannot do it alone. According to the 2021 Edelman Trust Barometer, for the first time, people now trust CEOs more than their own governments in 18 of the study's 27 tested countries. Youth are looking to businesses to help solve the world's problems more than ever as we emerge from the pandemic.

In a world where governments and other large institutions are perceived as increasingly slow to react, Gen Zers

expect their favorite individuals and brands to join their fight, co-create solutions and work together to drive change by placing purpose and impact at the heart of their strategies. According to Retail Dive, sixty-three percent of Gen Zers are more likely to purchase from brands with a charitable or giveback mission. Youth see your brand, its employees, and its leadership as an active part of their conversation and social fabric. **Purpose and its** resulting impact should be shared and participatory in a world where brands are rising up to fill gaps in trust.

SHIFTING TOWARDS A SHARING MINDSET ENABLING IMPACT. NOT JUST CREATING IT

BUSINESS BECOMES THE ONLY TRUSTED INSTITUTION Percent trust



Source: 2021 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media

CONSUMPTION ANCHORED BY IMPACT

Much of Gen Z shares a powerful belief that they can and will change the world for the better, with climate change, social equity, mental health, human rights, and social care on top of the growing list of social issues they feel highly invested in. These prevailing injustices are no longer just issues they discuss ad hoc. They're dominant attributes of the culture. The pandemic has also heightened Gen Z's passion for sustainability. Globally, Gen Zers are 20% more likely than average to say that it's become more important to reduce their environmental impact (FacebookIQ). Peter Semple, Depop's chief brand



officer, explains that "by shopping in this way, Gen Z is redefining what newness means." The growth of online secondhand fashion platforms is an example of the rising demand for products that combine Gen Z values with value.

Among Gen Zers surveyed, more than half (up to 69% in the UK) expect brands to make their stances and actions on social and political issues known publicly. Globally, 79% say it has become more important for companies to behave sustainably (Nielsen). Stop "doing marketing" and start exploring solutions.

INDIVIDUALITY IS FUEL FOR SOCIAL CHANGE

In the UK, 72% of Gen Zers say they've become more interested in activism and social causes since the pandemic began. And when it comes to activism, representation and diversity also play an important role. Gen Zers embrace their individuality and complexity, seeing diversity as an asset that the media surrounding them needs to reflect. In fact, nearly three-quarters of Gen Zers globally want to see more diversity in advertising, with only 12% feeling represented in the ads they see (Facebook IQ).

Given Gen Z's deep belief in the power of digital communication and organization to bring about real change, there has perhaps never been a better time to co-create impactful projects with this group. It's also critical that a brand helps Gen Zers to create or promote their own positive impact (e.g., to cultivate community or spread a positive message). A brand helping youth to show their values and express their points of view is more powerful than one that executes those same actions on its own. As such, sustainability-themed competitions aimed at Gen Z that award internships, collaborations, and cash prizes to finalists are on the rise.

EXAMPLE +5.628% Spanx The Prospect 100 x Kering -41% LinkedIn **Global Design Competition 2021** required participants Coolblue +335% 185 Volkswagen AG +866% 140 The School of Life Amsterdam +12,003% 130 European Central Bank +1,130% 106 Delta Air Lines +33% +268% Novartis 82 Banco Santander +1,900% 59 54 Ellevest +1,295% 87 53 Unilever -39% 50 +739% Hootsuite 35 +265% Danone IKEA +444% Tier Mobility +538% Ahold Delhaize +528% Vodafone +74% Circle Economy +204%

EMBRACING CO-CREATION AT ALL LEVELS: A GEN Z GROWTH PLAYBOOK

AVERAGE COMMENTS ■ Brand ■ Leader **BRANDS vs LEADERS** 845 667 390

Source: Connected circles.net

SHIFTING TOWARDS A SHARING MINDSET ENABLING IMPACT, NOT JUST CREATING IT

BECOMING A B CORP TO ATTRACT GEN Z

B Corps use profits and growth as a means to a greater end: positive impact for their employees, communities, and the environment. There are now more than 4,000 certified B Corps across 70 countries and 150 industries. (The global acceptance rate is 3%.) Examples include Patagonia, Chloé, Ben & Jerry's, the Body Shop, Allbirds, BrewDog, and TOMS.

Shifting from ownership to access: collaborative consumption

MAKING THE SHIFT: FIVE IMPERATIVES

"Certified B Corporations are businesses that meet the highest standards of verified social and environmental performance, public transparency, and legal accountability to balance profit and purpose. B Corps are accelerating a shift to redefine success in business and build a more inclusive and sustainable economy."

B LAB, US-BASED NONPROFIT

EMBRACING CO-CREATION AT ALL LEVELS: A GEN Z GRO

licenses (Allison+Partners). Moreover, cars

CRITICAL COMMUNITY BUILDING STRUCTURES

Once these shifts towards a sharing mindset have

been made, brands can explore optimal ways to establish a community with Gen Z. While there is no one best way to build and sustain community, we have identified several structures that resonate particularly well with Gen Zers and their desire to contribute. A few platforms, methodologies, and success stories to consider, listed in order of complexity and (likely) potential relationship value:



Online social platform communities

LARGE-SCALE AND PUBLIC: ONLINE AND EXTERNAL

EXAMPLES

Instagram, Facebook, TikTok, Twitter, Snapchat, and LinkedIn

Most brands have created a presence on large-scale, public social media platforms, which they use predominantly for building brand awareness; however, they often have low levels of engagement with the very consumers that support their product or service. A few brands have managed to build open, large-scale communities that integrate consumer voices, creators, events, and community into their social feeds, resulting in much higher levels of interaction, which benefit both the brand and the consumer.

Both Gymshark and Starbucks have developed large, open communities by consistently sharing user-generated content (UGC) across their public media

EMBRACING CO-CREATION AT ALL LEVELS: A GEN Z GROWTH PLAYBOOK

When asked "whether it's important to feel a sense of community building or kinship with other users across their favorite brand's social media accounts," more than 58% of Gen Zers responded Yes.

accounts, creating a more balanced and inclusive environment. Gymshark has gone so far as to create separate UGCled accounts: @gymsharktrain and @gymsharkwomen.

Other successful communities have been built by brands and co-managed by community members in large, open spaces. Two such brands are Peloton (Facebook private page: over 450K members) and Tesla, whose communitybuilt channels reach levels of fandom normally reserved for celebrities. Tesla recently launched a microsite, Engage Tesla, "a new platform for Tesla's public policy team and Tesla owners to create a digital home base for all of our work and make it easier for owners to learn what's top of mind for us" (Tesla.com).

ONLINE SOCIAL PLATFORM COMMUNITIES

DIGITAL CAMPFIRES: ONLINE AND EXTERNAL

EXAMPLES

46

IRL, Yubo, Slack, Roblox, Fortnite, Reddit, Discord, Geneva, Depop, Garnet, Co-Star, Mighty Networks, and Twitter Spaces

A move toward smaller, interest-based forums, dubbed "digital campfires," has surged among youth during the pandemic. Younger audiences have started leaving public-facing social media platforms and migrating toward more-intimate, inward-facing platforms to connect, select microcommunities, or participate in shared experiences with like-minded individuals. Forums hosted on Discord, Geneva, Twitch, and Roblox provide Gen Z a haven for conversation and friendships that would otherwise be impossible.

There are three main categories of digital campfires:

- *1.* Messaging Campfires: Text Rex, Community, WhatsApp, Telegram, Signal, and Snapchat
- 2. Community-Based Campfires: Slack, Discord, IRL, Geneva, Reddit, and Depop
- 3. Experiential Campfires: Fortnite, Roblox

"We really want to bring intimacy and authenticity back to the internet. We feel that it's become a little lonely, noisy, and even inhuman because we are all so reliant on algorithms making decisions about everything for us. We also want to support the idea that you don't just need to be in a group with 50,000 people, you can be in a group of 50 people, or even 5 people, and get value out of that. Over time, if we do things right, there can be a lot of different demographics on our app because you're not scrolling through IRL alone, you're with your communities, discussing the things you care about, doing things together with people you care about, and that's each user's unique, and we hope amazing, experience with IRL."

JASON KIRK, IRL APP'S CHIEF BUSINESS OFFICER, INTERVIEW WITH OGILVY AND THRED MEDIA, MARCH 2022



ONLINE SOCIAL PLATFORM COMMUNITIES

Estimates show that 80% of the sharing of content among Gen Z happens via private social or messenger channels. Gen Zers don't share content less than they used to; they just share it

differently, through private channels like WhatsApp, Telegram, Signal, and

Discord, or more traditional channels

such as text messaging. Surprisingly,

users per month compared to social

messaging apps have 20% more active

networks (*Business Insider*), and a recent

study showed that 63% prefer to receive

social channels (such as the Drum). Apple,

KENZO have all managed to successfully

cultivate active communities that engage

content and recommendations via dark

Xbox, and more recently, Gucci and

directly with brand representatives

using private Discord servers.



CRITICAL COMMUNITY-BUILDING STRUCTURES

"Discord is another form of CRM right now. It gets your most coveted fans and community into a conversation, which is rare on social media. The main driver is the desire to engage with communities in a direct way, which is becoming increasingly hard to do on algorithm-centered platforms like Instagram." QUYNH MAI, MOVING IMAGE AND CONTENT, *GLOSSY* INTERVIEW

EXAMPLE

Glossier harnessed its "Into the Gloss" blog community to help turn it into a brand "made by the people, for the people." Glossier started a Slack channel divided into states, where engaged readers and fans were asked to participate and talk directly with the brand. "We have the Glossier team in the Slack channel, listening and reacting to real intel and feedback. Involving loyalists very early on in the product development conversation changed the paradigm for how brands could partner with their customers in a meaningful, long-term and impactful way.

GLOSSIER SVP OF MARKETING ALI WEISS



Channel-agnostic communities: brands, employees, and Gen Z creatives working together to drive shared connections

GEN Z EMPLOYEE-DRIVEN WORKING GROUPS: INTERNAL, IRL AND/OR ONLINE

In addition to sharing with Gen Z consumers, brand leaders are realizing how much more young employees (both corporate and "on the floor") can contribute to the brand, as they often have a ground-level view, access to online communities unknown to senior leaders, and ideas derived from their own life experiences.

Samsung has just launched a unique and forward-thinking internal structure called the Gen Z Lab. The aim is to encourage meaningful communication with Gen Zers and better understand their unique beliefs and behaviors. The 73 employee-members of the Gen Z Lab completed a one-month training course focused on brand and market insights and had the opportunity to learn about content creation and visual storytelling from successful YouTubers.

The members are expected to interact with other Gen Zers, produce content focused on specific interests and lifestyles of Gen Zers in each region, organize popup events, and collaborate with Gen Z's favorite brands and artists. They also feed ideas to executives to help them understand Gen Z and to provide insights that can support the business decision-making process. "We expect Gen Z Lab members to become true storytellers who can represent Gen Z customers in their own disruptive and creative ways. We root for creative and exciting marketing activities from Gen Z Lab members," said Dudu Mokholo, chief marketing officer at Samsung Africa.

EMPLOYEE-DRIVEN TRUSTED CONCIERGES: EXTERNAL, IRL AND ONLINE

Despite the explosive growth of digital communities, several brands have successfully crafted ways of getting closer to Gen Zers in their own physical neighborhoods. These strategies allow for an organic collaboration between Gen Z, the brand, and the community by creating forums that facilitate ideation, personalization, and sharing.

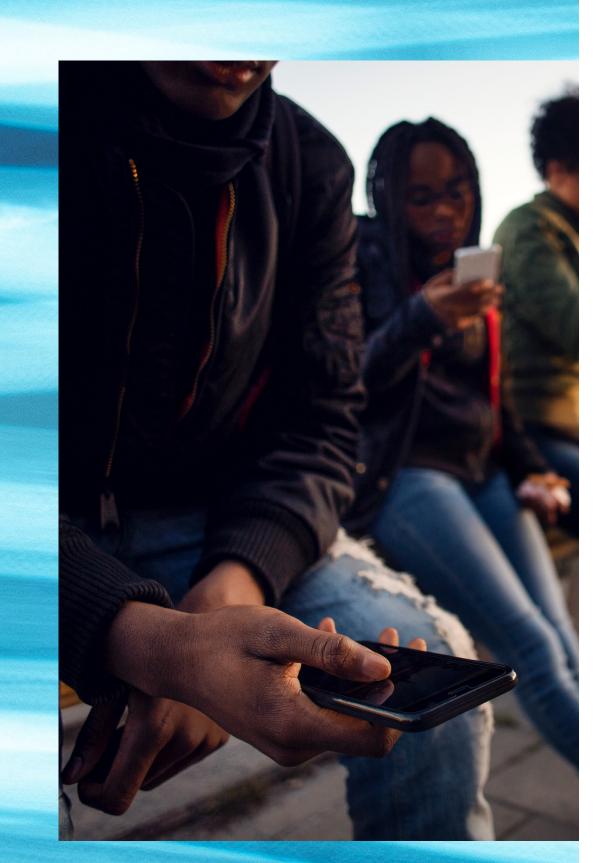
Nike, for example, is creating an ecosystem of small-format, digitally enabled stores as part of its Nike Live concept. The move emphasizes localization, sustainability, and community by tailoring the in-store stock, design, and engagement elements to the surrounding neighborhoods. The hyperfocused customer experiences are built to be lab-like spaces for testing evolving customer offerings based on the sharing of feedback between employees and customers. New services such as ship-from-store capabilities, instant reserve, and curbside pickup systems (such as BOPIS) are coupled with cutting-edge QR code features such as scanning products to send to a fitting room and check size and color availability, and Nike Unlock Box vending machines, which let members unlock a free product, such as a pair of socks, from an in-store vending machine.

Central to these new stores and meetups are not all the state-of-the-art technology, but the overarching human touches such as group workouts, exclusive local events, local artist murals, and Nike staff becoming trusted concierges by displaying staff picks in the store with handwritten notes so shoppers can check out what employees are loving, trying, and buying. Think of it as a return to Old World service with a whole lot of tech convenience operating in the background.



BRAND-DRIVEN WORKING GROUPS, GEN Z CREATIVES, ENTREPRENEURS, AND TREND EXPERTS: EXTERNAL, IRL, AND ONLINE

Several companies are now forming Gen Z working groups that contribute to everything from the brand's purpose to customer service. The success of these forums hinges on a brand's willingness to invite Gen Zers in at all levels, embrace their views, and share the brand's business strategy. Brands like Google are already inviting Gen Z into many aspects of their strategy development, product ideation and planned rollouts. Community members are no longer simply part of outdated product focus groups; instead, they are invited to join councils that collaborate in real time, on a weekly



CRITICAL COMMUNITY-BUILDING STRUCTURES

> "One of the things that we've seen specifically with Gen Z is the need to have a forum where they can contribute their ideas. It isn't about giving feedback on one thing, but it is about helping to shape and form the idea from the time it is seeded. I think there is a deep recognition from our leadership that we are no longer the people we are designing for, because we are not the next generation of users. Therefore, it's important to engage in all aspects of development as early and as often as we can. Our Gen Z-Council was one of those ways; it's highly qualitative and it feels very different from the type of research we normally do. It was far less about getting to like a singular product solution and far more about using the ideas to more deeply connect and understand their needs and behaviors."

ERIN MUNTZERT, INSIGHTS AND INNOVATION LEAD AT GOOGLE, OGILVY AND THRED MEDIA INTERVIEW, MARCH 2022

basis, with decision makers from across the company. With its Gen Z-Council, Google teaches a select group of young people how the company functions internally, shares in-depth research and insights on various topics and then poses genuinely thought-provoking questions to begin the sessions. Google found an overwhelmingly positive correlation between the depth of information it shared and the quality of Gen Zers' insights, as well as their desire to help the brand improve across the board.

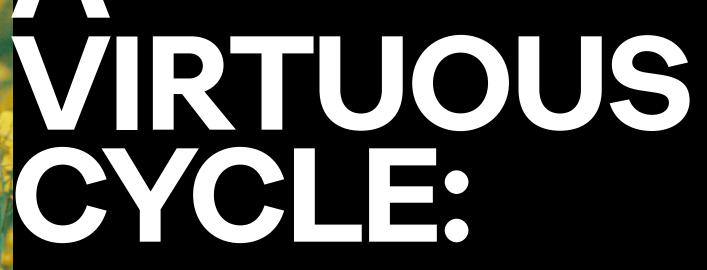
The world's best brand communities give their members a place to bring other like-minded individuals into the brand's story, a seat at the most important tables, and the power to build new ones. Note: not all of the above companies share the same pieces of their brands.

When asked if they "feel like they have a place to give direct feedback, get their ideas heard and share the changes they would like to see in the brand." more than 50% of Gen Z said "No."

OGILVY AND THRED MEDIA GEN Z SURVEY, MARCH 2022



A



sharing builds community, and communities encourage sharing

The long-term success of

community building will depend on a brand's willingness to share in a way that is consistent, transparent, and personal. It's not about pushing products or asking users to take a poll; it's about giving them a voice and shining a light on their ideas, experiences, and beliefs.

When asked, "If compensated, would you be interested in offering feedback into the creative process, product development or strategic planning of your favorite brands?" 80% of respondents answered between 7 and 10 on a scale of 0 to 10.

According to Get Together, a handbook for building community by the agency People & Company, "The secret to getting people together is this: build your community with people, not for them."

Developing a highly communicative and interactive community excited about co-creation requires cultivating a smaller, more deeply connected group of like-minded individuals who

want to invest the time and effort needed to get to know your brand and other community members. This is the time to lead, and that begins with the invitation to share. Brands need to design thoughtful, engaging, and creative opportunities that encourage shared ideation and longer-term partnerships for their community members.





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EXAMPLE

Mattel Creations To reignite its brand and heat up its vast community of users, 75-year-old legacy toy company Mattel launched a new content and commerce platform in 2020 called Mattel Creations, designed to allow users into the creative development and product portfolio of its famous brands such as Barbie and Hot Wheels. The result is a global platform that offers "the beloved brands as a canvas to the most innovative creators of today and tomorrow." In a 2020 article spotlighting the project, *Fast Company* wrote, "The venerable \$4B toymaker is going to direct to consumer, with a new e-commerce, community, and content site using its classic toys as an artistic canvas."



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Members-Only Forums View and respond to message and insider info restricted to members.



Community of Collectors Interact with collection fans who share your level of passion for the hobby.

The platform offers brand-specific memberships, which give users access to exclusive items, member-only forums, creation opportunities with established artists, and decision-making privileges in a huge variety of crowdsourced products. Mattel Creations is a perfect example of a classic brand with a traditionally structured value chain reshuffling to place its users and their preferences at the center of its evolving behavior. The best part? The brand is staying true to its core. "Mattel Creations" was the name of the original sign that hung above the garage when Mattel was founded back in 1945.



priorities, Gen Z's connectivity and the shifting power dynamic between brands and creators demand that more young individuals be included at all levels of your business. As Gen Z continues to amass economic and cultural influence, brands must adopt a sharing mindset and decide which Gen Z interests matter most and which community structures best foster them. With a flourishing community that entitles rather than dismisses young leaders and a sharing mindset, firms can create novel relationships, exciting user experiences, and wholly new product categories as well as avoid costly market missteps.

The importance of community is nothing new, but the thought of giving up control to gain trust and build lasting bonds with Gen Z runs against the grain of traditional brand guidelines and community management. Business leaders must grow comfortable co-creating and giving up complete ownership to gain the next-and largest-generation of potential new

While every generation wants to build a world that reflects its

users. Such radical decentralization of brand control will likely change business models and internal team dynamics. What else must change when you share, and where should you start?

We'll show you in the next part of For Gen Z, Brand Is What You Share, Not What You Sell.

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Reid builds Brand and Marketing Strategies with purpose - contributing to growth brand strategy, community building, and innovation projects for top brands, creators, & startups at Ogilvy Consulting. He is also building a Studio offering at Ogilvy to connect client brands to the pulse of youth culture, everyday kids, and the creator economy through co-creation. He's interested in the intersection of social equity, brand, and technology, believing brands can be instrumental in changing not only social forces, but concrete policy in the years to come.

Ogilvy CONSULTING



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Thred Media is a consulting agency focused on publishing, media, consulting and production aimed at Gen Z. The central tenet is the 100% social changefocused website Thred, which is available in seventeen languages and reaches readers in 220 countries/territories a month. Thred Media allows its clients to access a Gen Z approach to research and futurecasting insights using first-hand data, co-creation strategies and gamechanging content production.



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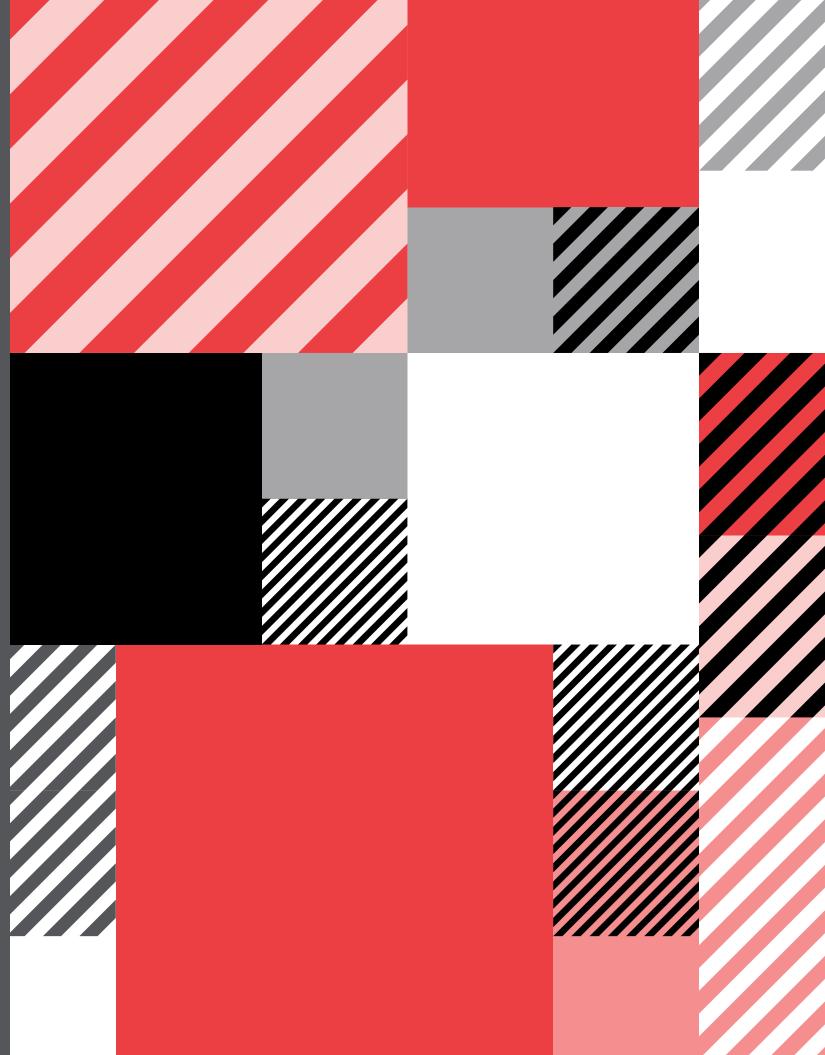
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