

GEN Z



HYBRID STATES

a generation
defined by duality



Kamal, 22, Shoreditch, London



Qi Shuen, 21, Singapore



Vinitha, 24, Singapore



Magalie, 23, Amsterdam



Yinka, 22, Notting Hill, London



Angelo, 22, Romania



Jade, 22, Wilesden Green, London



Romeo, 20, France

the hybrid generation

Gen Z are many things. They're health obsessed, alcohol avoiders with a plan to save the planet; but they're also everyday teenagers intent on breaking rules, uploading selfies and staying glued to their friends. While this duality can be a daunting prospect for brands to engage with, one thing is very easy to grasp – Gen Z are now the biggest generation on earth.

Gen Tech, iGen, Net Gen and Digital Natives: Gen Z are the post-millennial generation born after 1995 and on the verge of adulthood. There are currently over 2.5 billion of them worldwide. That's a bigger group than millennials, and a much bigger one than boomers. Most of them are still kids or teens (oldest are 24, youngest are nine), but they'll make up the majority of the world's consumers in just a few years. It's time to take notice, that's for sure, but how do you speak to a generation in such a constant state of flux?

In this report, we're introducing Gen Z as the Hybrid Generation. A group defined by their own duality, we'll first explore the context that they've grown up in and how we got to thinking of them as hybrids. We'll then explain how to think differently about Gen Z's values and motivations via our concept of hybrid states; followed by some examples of hybridity within youth culture and tips for building out strategy with Gen Z's duality in mind.

A lot of our history at Crowd DNA is wrapped up within youth focused projects. We've been exploring teen culture for years and feel like we know their highs, lows and habits pretty well (in fact, all images used in this report were taken by us on a recent photojournalism jaunt). This piece of work is a special one for us, and we hope you enjoy reading about Gen Z's hybrid states as much as we've enjoyed exploring them.

Crowd DNA

the world as they know it

exploring the cultural context of gen z

Like all generations, Gen Z are a product of the unique circumstances of their upbringing. They are shaped by the cultural, political and economic developments that occurred during their pre-adult years (see timeline to the right for a quick overview).

More specifically, what really shapes a generation are the resources that are in short supply during their youth. People tend to be drawn towards the things that they're lacking. For example, if there's a time of social upheaval and distress, the values that are nurtured by that particular generation end up being materialism, conformity and respect for authority. Likewise, if a generation comes of age during a period of safety and security, people are likely to lean towards individualism, self transcendence and a tolerance of diversity.

But what happens when there's nothing culturally absent (so to speak)? Where do people gravitate towards if there's not much missing? Below are a few of the key cultural contexts surrounding Gen Z – a time characterised by cultural abundance and excess, where opposing situations and ideas exist simultaneously:

leave

remain



toxic masculinity

new feminism



UK climate change commitment

US climate change rejection



progress in science

new spirituality



stagnation in the west

economic progress in the east



easy living

terrorism threats



ageing population in the west

50% under 25 in Africa/Middle East



Gen Z's context is polarised and global

Looking at these cultural contrasts, Gen Z's context is undoubtedly polarised. There isn't anything in 'short supply', and, though these examples are in direct opposition of each other, they still coexist.

Today's young adults are coming of age in a hyper-saturated world where the word 'and' eerily connects complete opposites. This backdrop is compounded by the fact that they're the first truly global generation. Social media has connected them to each other from all corners of the planet. And, as Gen Z talk, swap stories and share experiences, their range of influences – and the potential for even more cultural polarisation – multiplies too.

In the West, an economic recession has birthed a generation who look after their money and want to make the world a better place. In China, however, a very different run of economic growth has meant Chinese youth happily embrace consumerism; meanwhile, on the African continent, advances in technology have opened up opportunities and sparked entrepreneurship among African youth. As an interconnected generation, Gen Z have grown up with access to these different global trajectories – at all times – mixing and matching their influences as they go.

2019	Same-sex marriage becomes legal in Austria and Taiwan	2018	Putin enters fourth term as Russian president
2017	MeToo movement begins	2016	» Trump elected as US president » UK votes to leave EU
2015	China becomes the world's largest economy	2010	» Instagram launches
2009	Bitcoin is released	2008	» Global financial crisis hits
2007	» First iPhone on the market » Contactless payment systems introduced	2005	» YouTube founded » Merkel is first female Chancellor
2001	» Attacks on the World Trade Center » African Union established	2000	Nokia 3310 is best-selling mobile worldwide
1999	» Creation of the Euro » World population hits 6bn	1998	Google founded
1997	» Hong Kong returns to Chinese rule » First Harry Potter book published	1995	First CGI-only film: Toy Story
1991	World Wide Web made available		

key events that shaped a generation

a generation
defined by

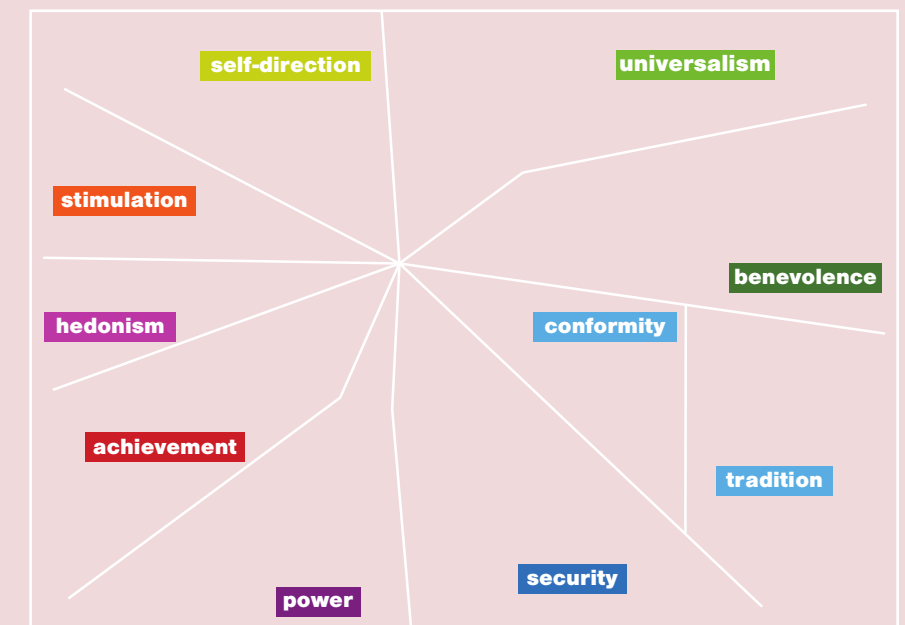
dua

lity

The complexity of Gen Z's cultural context is creating a hybrid generation.

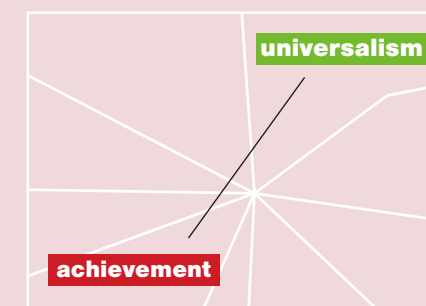
We see their behaviours combining, due to the connected yet polarised world they've grown up in. Gen Z are never just 'one thing' (see pages 4-5). To illustrate this, we use Schwartz's Theory Of Basic Human Values. This model helps us understand an individual's motivations and values that might determine a behaviour, attitude or even a purchase decision.

Schwartz's Theory Of Basic Human Values

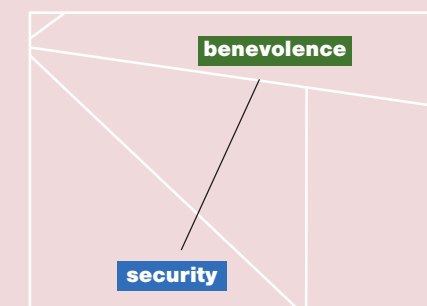


Hybrid states are a combination of these different values fused together in unconventional ways

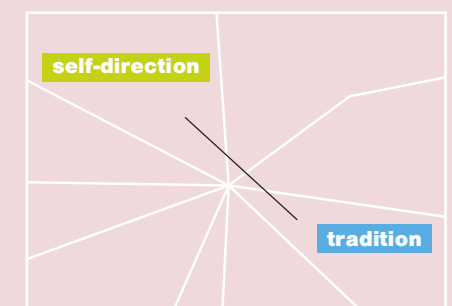
However, when we use this model to look at Gen Z, something exciting starts to emerge. Their value states are never binary. They don't plot easily on the map. Instead, we see their behaviours and motivations combining in strange ways, leaving us with what we call hybrid states. Here are three examples:



They pursue **personal achievements**, but nurture **universal values** at the same time (like social justice). This creates a new, hybrid state.



Motivations stem from a need for **security** (like maintaining their health), but often combine with **benevolence**, for example, in the form of new spirituality.



They hold **traditional** values, but they're **progressive** when it comes to **self direction**. This creates new states, such as Gen Z's ability to find new ways of relating to themselves and the world around them.

hybrid states are a mixture of different values combined in unconventional ways.



hybrid states

We've identified nine hybrid states that we see Gen Z occupying. As before, 'and' is the most important word – these values aren't in conflict with each other, they're blended together to define who Gen Z are and how they act. The nine states are below, and we'll then explore four in more detail to show how they're reflected in youth culture today.

gen z hybrid states:

Hyper Global & Super Local

Traditional & Progressive

Purpose Driven & New Age Hedonists

Head-Down Hustling & Seriously Slacking

Brand Loving & Brand Hating

Analogue & Digital

Scientific & Spiritual

Valuing Real & Faking It To Make It

Experiential & Material

hyper global & super local

Gen Z are global citizens constantly connected to culture from around the world, but also plugged into their immediate, local communities. They're proud of where they come from and how their roots define them, using social platforms to broadcast their unique self-expression across borders and around the world.

Hyper Global

Dabbing: Gen Z's constant connectivity has allowed memes like the dab dance to become a universally understood action among teens around the world, a kind of common language.

K-pop: Likewise, the rise of Korean pop music has come to represent a new and universally recognised teen boyband idol. BTS, for example, have taken their message of openness and fluidity across borders, out of South East Asia and to the top of the charts in the US and UK.

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Super Local

Selective socials: Huge global brands like Snapchat are turning inwards, enabling and encouraging teens to stay in touch with their close friendship circles via new private group features and bespoke filters for certain friends.

'Made In': China's rapid economic growth has led to a resurgence in national pride. When mixed with cultural experimentation, it's proving fertile creative soil for Gen Z, with globally successful fashion brands like Angel Chen combining contemporary streetwear styles with nods to Chinese heritage. Similarly, in Korea, rising house music sensation Peggy Gou is successfully infiltrating a very westernised industry using Korean lyrics on her records.



"I'm really proud of where I'm from. I say I'm from the 14th. I show flags on my Instagram homepage to celebrate where I am from. I'm proud of my roots."

Maimouna, Paris



Mid-air dabbing



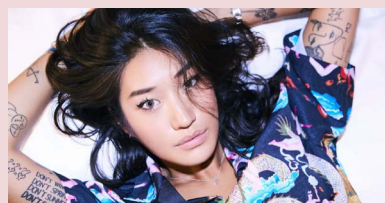
Korean teen boyband BTS



The app for preserving friendships



On the runway with Angel Chen



Music sensation Peggy Gou

traditional & progressive

Gen Z's childhoods have been set against a backdrop of uncertainty; from financial, to political, to environmental instability. In response, they tend to be risk averse and like to plan ahead. But they also challenge the status quo – their identities and genders are becoming more fluid than ever and their lives are anything but linear.

Traditional

Role models: Perhaps surprisingly, many of Gen Z's idols are still fairly traditional, such as the Jonas Brothers and their distinctive brand of All-American, pro-marriage Christianity; or Justin Bieber and Hailey Baldwin, who made no secret of the fact that their faith was an important factor in their decision to get married.

High morals: According to the Office For National Statistics in the UK, Gen Z are consuming 20 percent less alcohol than their millennial counterparts drank at their age. Similarly, the University Of Chicago found the portion of young Americans reporting having had no sex in the past year more than doubled between 2008 and 2018. Globally, teenage pregnancy rates have also fallen by 55 percent in the last decade to their lowest ever level.

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Progressive

Blurred lines: Increasingly, Gen Z are exposed to influencers and celebrities who play with gender boundaries and challenge notions of masculinity and femininity. Jaden Smith, for example, experiments with his identity through fashion, while Hari Nef and Avi Acosta represent a new cohort of transgender supermodels flying the flag for greater inclusivity.

Labelless fashion: 48 percent of Gen Z value brands that don't label goods as either for men or women. In response, a number of big name retailers have launched unisex lines that avoid selling on the basis of gender. Take ASOS's new Collusion line, which launched in late 2018 and sells a selection of streetwear that can be worn by anyone, whatever their gender.

"Our generation are happy to explore themselves in ways that previous generations weren't. We're unique. We fight to raise awareness for so many things – from gender fluidity to open sexuality."

Rosie, Newcastle



The Jonas Brothers



NOLO booze



Justin Bieber and Hailey Baldwin



Jaden Smith for Louis Vuitton



Transgender model Hari Nef



ASOS's gender-neutral Collusion line

purpose driven & new age hedonists

Marching towards achieving a better and brighter future for mankind, Gen Z are keen and vocal activists. This proactive attitude seeps into their downtime too, where pure escapism is no longer the ultimate form of fun. Instead, they seek to socialise with a higher purpose; indulge in planet-friendly food and enjoy *healthy* activities.

“I’m really interested in politics and climate change - I feel like my generation are very conscious of problems.”

Theo, Belgium

“I’m not quite an adult just yet! I like all the normal things, shopping, music, the beach.”

Ortaa, Tel Aviv

Purpose Driven

Activists at heart: We only need to look at the lineup of Gen Z poster kids all united by a desire to change the world, to see the power of youth activism. Amika George is a period poverty activist who led her first protest in 2017 and continues to fight the fight; Emma Gonzalez of Marjory Douglas Stoneman High School is a vocal advocate for gun control laws and co-founder of the student-led group Never Again; and Greta Thunberg is the famous Gen Z climate change activist who, at only 14 years old, is successfully shaking up government officials all over Europe.



Period poverty activist Amika George



Gen Z climate change activist Greta Thunberg



Emma Gonzalez in action



Kicking back



Veganism 4 eva

&

New Age Hedonism

Kickbacks: A 'kickback' is the sophisticated Gen Z sweet spot between the lairy house parties of yore (the ones typified by vomit on the parental carpet and a trashing of the family home) and a pre-teen sleepover.

Healthy vices: The rumours are true – hedonism is now laced with health, purpose and pursuits of wellness. Almost half (44 percent) of Gen Z say that being vegan is cooler than smoking; and they're now known to be getting addicted to Juuls not cigarettes.

head-down hustling & seriously slacking

The internet has allowed Gen Z to become overnight entrepreneurs who waste no time in turning their hobbies into side hustles. However, it's also opened up a stream of endless and bingeable content that allows them to zone out from the world through their smartphones. Influencers make online careers look easy, and Gen Z expect to be their own boss from day one.

“It’s a waste of time if you have lots of talent and little determination.”

Assemian, Paris

Head-Down Hustling

Depop: Gen Z might as well be referred to as a generation of Depop entrepreneurs, as huge numbers of teenagers all over the world make and shake thousands of pounds buying and selling clothes on the peer-to-peer mobile shopping app.



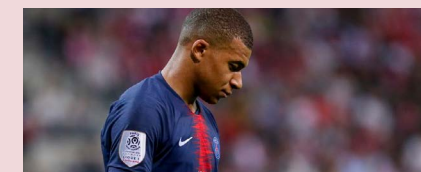
Generation Depop



Schoolboy entrepreneur

Henry Patterson: Schoolboy entrepreneur and founder of children's brand Not Before Tea, Henry Patterson is setting out to educate his generation on the value of money and work. His new book, *Young And Mighty*, combines practical advice with the author's own recipe for success and happiness. Arguably, not all children are natural-born entrepreneurs at such a young age, but Patterson is on a mission to unlock some of the traits inherent in so many 10 to 14 year olds out there.

Kylian Mbappé: The young french footballer of Paris Saint-Germain fame has had a sharp ascent to stardom, having gone from a poor Parisian suburb to World Cup winner. Always being applauded for his work ethic and spirit, his success is testament to his embodiment of the hustler nature of Gen Z.

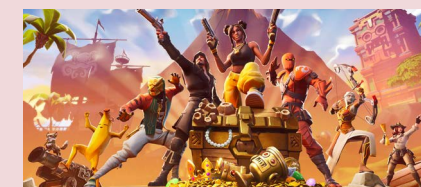


Huster icon - Kylian Mbappé

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Seriously Slacking

Fortnite: The multiplayer video game with over 250 million users worldwide is often called out for hogging the attention of a whole generation. New articles are posted practically every week full of parental concern that kids are spending too much time building and shooting their way to first place. The current theory in Fortnite's favour is that it is as much a social media platform as it is a gaming experience, allowing Gen Z to make and maintain valuable friendships in a new, digital universe.



Fortnite takes over

Bedroom boardrooms: Today's young adults are looking at influencers working, networking and uploading content from their bedrooms and aspiring to do the same, rather than working their way up from the bottom to the top. They're also cutting out going to university because they don't see the point in degrees – they're not just slacking, they're impatient.



CEO in the making



**gen Z are
bombarded with
messages and
can quickly detect
whether or not
something is
relevant to them.**

Nielsen Gen Z report, 2019



**gen Z
P O A**

1

Treat hybridity as a creative opportunity. Duality provides fertile, experimental space – so embrace the fact there's no right answer when it comes to brand and comms, for example.

2

Equally, use the rich mixture of Gen Z's motivations, needs and values as inspiration for new products and services. Explore the unusual behaviour combinations and come up with solutions that speak to multiple need states of young adults today.

3

Recognise that cultural relevancy is more important than ever. The whole notion of hybridity speaks to Gen Z's fast moving world, where culture combines and contrasts in different ways (and means different things to different people, in different markets).

4

Start unlocking which particular hybrid states motivate your Gen Z audience. Not all will be relevant, nor useful, so map out the needs and values that feel most familiar to your brand, and then see if the opposites apply too.

5

Tying all this together is the need to get out there and actually speak to Gen Z, in real life. Hybrid states are a direct result of this generation's cultural context – so, in order to uncover real, culturally relevant consumer insights, a direct understanding of their lives is key.

**five ways to win with
Gen Z's hybrid states...
no matter what your age**

A few brands doing it well:

SweeTARTS, Be Both

The US confectionary brand's latest campaign work captures the multidimensional aspirations of Gen Z. Be Both makes a case for multiplicity and is meant to convey the generational embrace of fluid identities.



Chilling Adventures of Sabrina, Netflix

Hybrid states give way to successfully complex characters. Take the recent revamp of TV series Sabrina The Teenage Witch, which sees the title character coming to terms with being both witch and human, using good and bad magic, where the moral of the story is that it's fine to be both.



Gucci, Chime For Change

Similarly, hybrid states also find harmony within successfully complex brands. Gucci, for example, can appeal to both Gen Z's consumerist and activist states via its Chime For Change initiative. A very consumerist product with a heavy marketing approach (bold prints, big logos etc) is met with an unjarring cause that donates money to gun control campaigns across the US.



Thanks for reading.

Crowd DNA is a cultural insights and strategy consultancy with offices in London, Amsterdam, New York, Singapore and Sydney.

Formed in 2008, operating in 60+ markets, we bring together trends specialists, researchers, strategists, writers, designers and film-makers, creating culturally charged commercial advantage for the world's most exciting brands.

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