



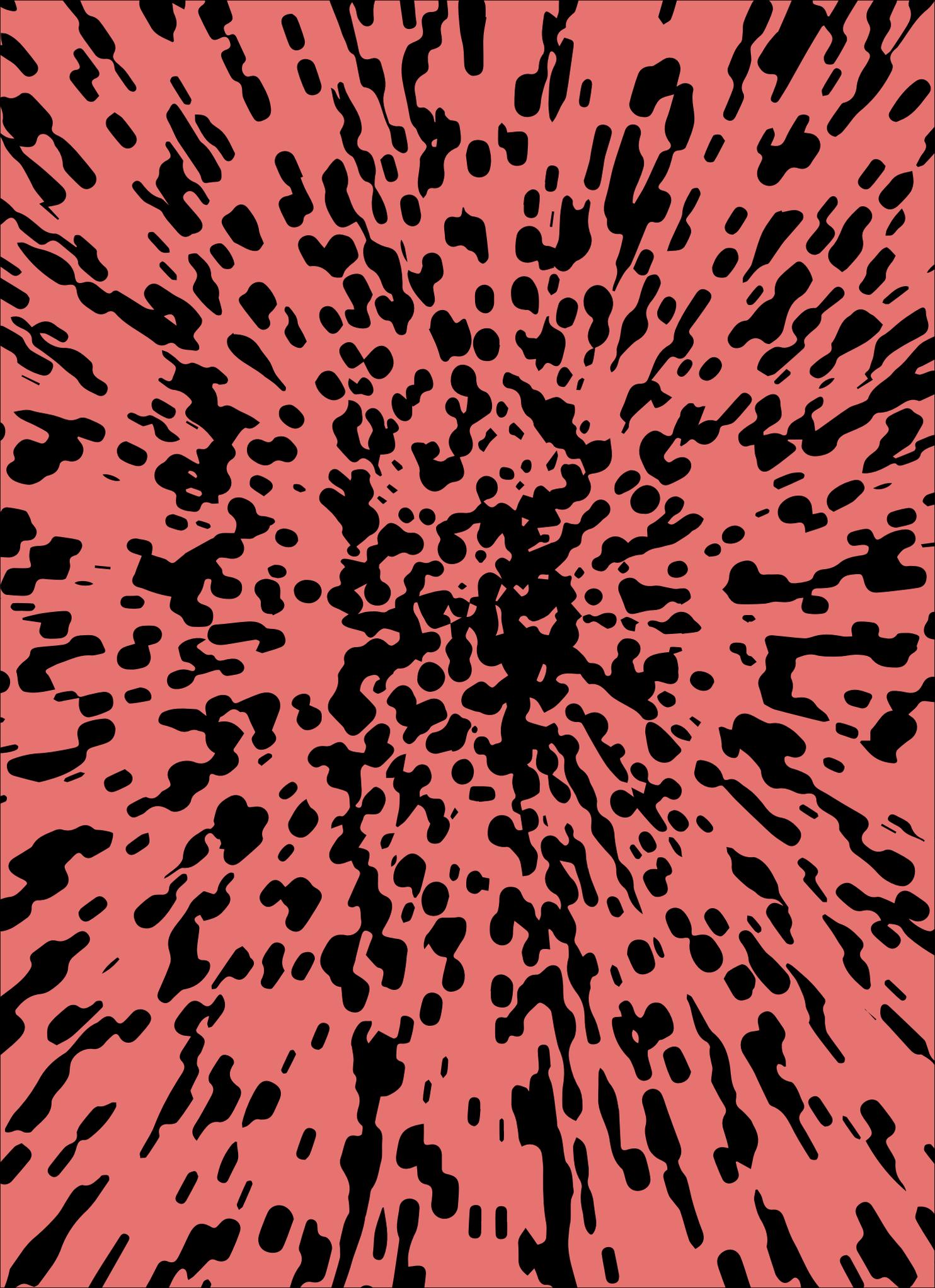
COM
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COLLECTIVE

WHAT'S NEXT

G E N E R A T I O N
A N T I D E N T I T Y

Complex Networks × psfk



**Moving beyond labels to
engage audiences in an age
of ever-evolving identities**

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LABELS ARE BECOMING OBSOLETE



Brockhampton.

"This younger generation isn't easily defined. You can't assume somebody who likes streetwear also likes hip hop or sneakers. Whereas before, if you liked one of those things, you often liked others in the same orbit. But now young people have so many different entry points to how they find out about these things."

KARIZZA SANCHEZ
DIRECTOR OF CONTENT STRATEGY, COMPLEX

Donald Glover, Lil Nas X, Russell Westbrook, Rihanna, A\$AP Rocky, Brockhampton, Billie Eilish, Virgil Abloh... they reflect a new generation of multi-hyphenates who are rejecting classification from all angles, refusing to be pigeonholed. Youth culture is embracing music, art and fashion that moves fluidly between genres or defies categorization. They are also rejecting society's restrictive labels in favor of defining themselves, creating new ones that better represent their pride in diverse values, brands and affiliations. They are breaking down binaries, erasing stigmas and embracing fluidity when it comes to all aspects of their identity. This is **Generation Antidentity**.

This cultural shift presents a challenge to marketers, who have traditionally segmented audiences based on demographics. The old tactics and assumptions are no longer appropriate or effective. Younger generations expect to be engaged under the auspices of their interest points, allegiances and beliefs, not their age, race and gender. They expect their favorite brands to connect with them as individuals, rather than on the basis of outmoded demographic research or comScore segments.

Featuring four key trends that examine the different ways in which a new generation is defining themselves on their own terms, **What's Next: Generation Antidentity** is meant to serve as a must-have manual for executives and marketers at agencies, brands and media companies looking to understand today's consumers.



ABOUT THIS REPORT

This report has been developed as a collaboration between Complex Networks' insights and research solution, Complex Collective, and PSFK, the progressive NYC-based strategic innovation advisory, to help brands connect meaningfully with a new generation who embrace a new way of defining themselves. It features four key trends tied to changing desires and behaviors, supported by consumer insights gathered from a bespoke survey of our Complex Collective, providing readers with firsthand insights from leading experts and actionable steps to implement these ideas and effectively engage this sought after audience.



WHAT

YOU

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TO

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A new framework of behaviors and expectations demands that brands, retailers and other consumer-facing organizations rethink the engagement, production and marketing strategies that were successful with previous generations. These 4 thought starters will enable companies to design for the youth-oriented mindset.



WHAT YOU NEED TO KNOW

EMBRACING FLUIDITY

Young people don't feel beholden to labels like gender or genre, instead embracing a fluid approach to the fashion, music and culture they consume. To appeal to and inspire members of this new era of genreless-ness, find collaborators who challenge traditional creative boundaries. Give your collaborators space and freedom to create something that is equally hard to put in a box.



Billie Eilish.

WHAT YOU NEED TO KNOW

CRAFTING AN IDENTITY

For members of the most diverse generation ever, inclusivity is a given, and young people expect to see themselves represented in the culture around them. They want the freedom to create and control their own identities, which means rejecting society's labels in favor of choosing their own. Don't expect your audience to fit seamlessly into a demographic or algorithm; instead, give them the freedom to create their own labels.



Verdy.



CREATING COMMUNITY

Fashion and music bring people together, both online and off. Brands and marketers should give this generation opportunities to interact and communicate IRL. Create inclusive communities around shared interests, in order to nurture devoted fans and give them the tools to communicate with each other – as well as your brand.

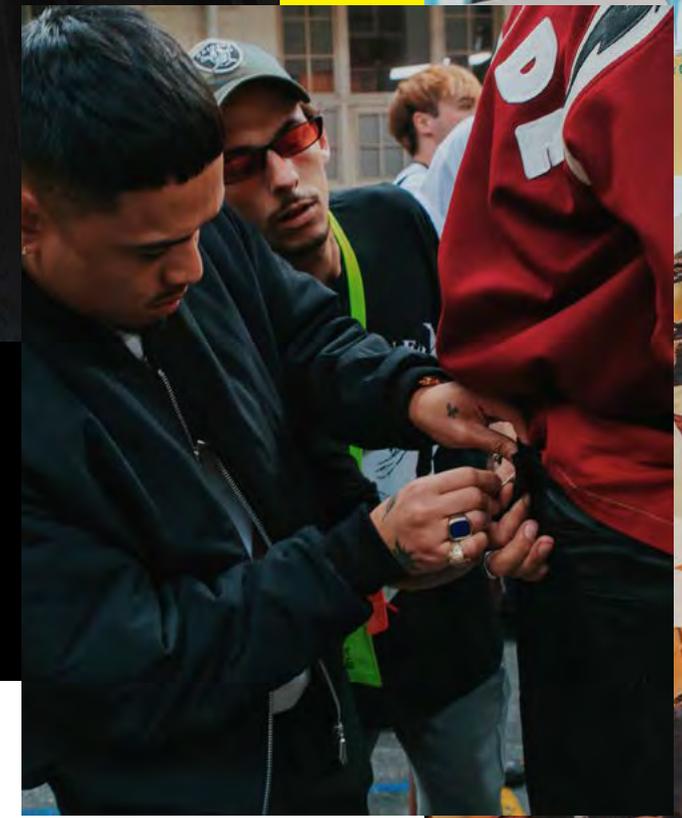
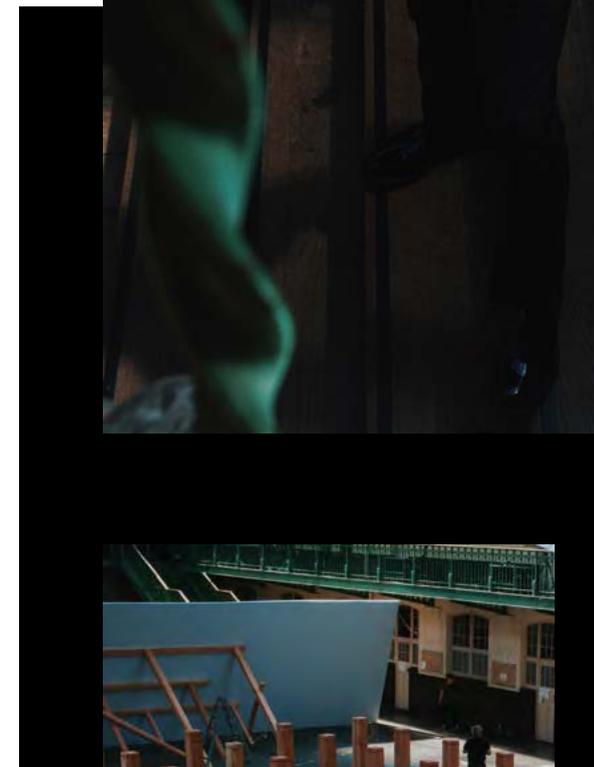
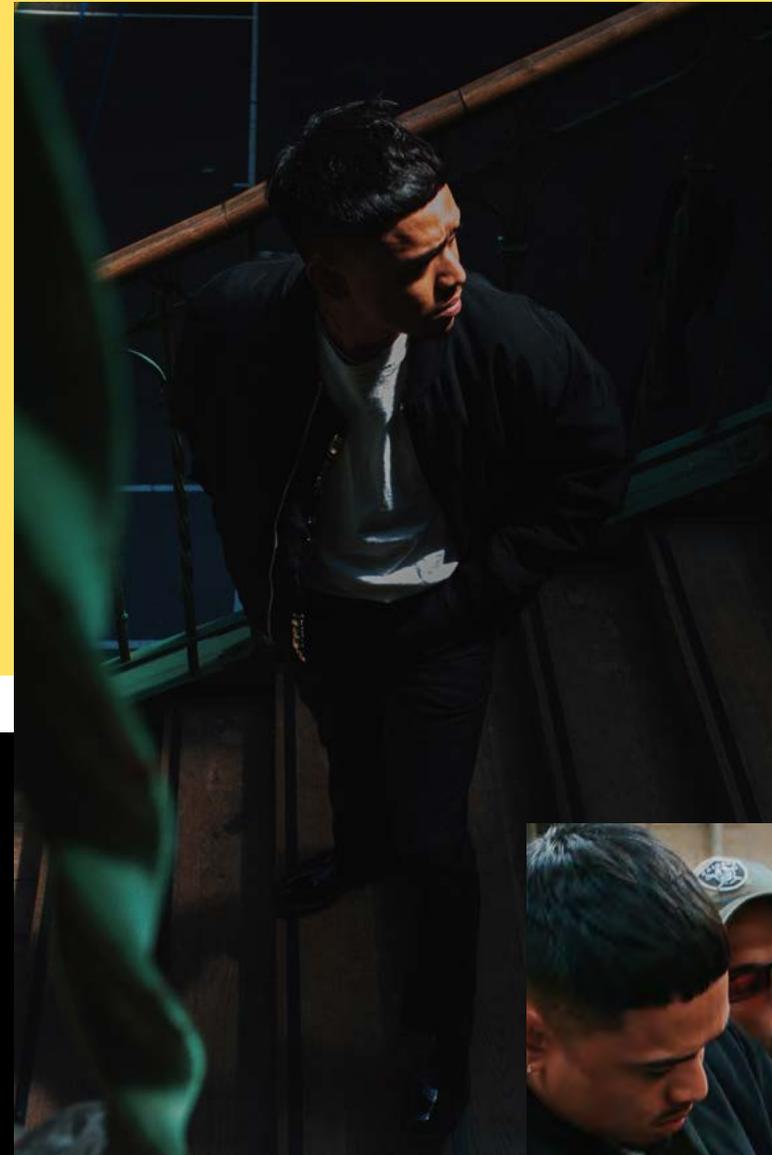


Brockhampton.

WHAT YOU NEED TO KNOW

REDEFINING EXCLUSIVITY

Today, exclusivity isn't only about what you spend, but more about the products and services that allow you to express yourself uniquely and creatively without fear of over-commodification. To make your product truly covetable, focus on individuality in addition to loyalty and hype. Young consumers care more about individuality and think of themselves as undefnable; brands should focus on crafting products and services that feel as rare and one-of-a-kind as their customers are.



Rhuigi Villaseñor.



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As younger generations seek to define themselves by their interests and allegiances, not just their demographics, the old rules no longer apply. A bespoke survey of our Complex Collective members reveals insights into this emerging mindset.

IN THEIR
OWN
WORDS



THEY

REJECT YOUR

LABELS

78%

say that people should have the ability to define their own identities instead of having society apply labels to them.

83%

say that their generation is more open-minded than previous generations.

IN THEIR
OWN
WORDS

IT'S NOT JUST
WHO YOU ARE

BUT WHAT YOU'RE INTO

81%

agree that it's important to be able to connect with other people who like the same things they're into.

76%

strongly agree that their passions and interests are an important part of their identity.

75%

agree that they enjoy using social media to share one-of-a-kind products and/or exclusive experiences, such as limited-edition sneakers or secret concerts.





CREATIVITY

SHOULDN'T HAVE LIMITS

78%

strongly agree that musicians, artists and other creators shouldn't be defined or limited to a particular genre and should feel free to mix different genres in their work.

86%

say that their generation is more creative than previous generations.

71%

agree that social media is an important tool for self-expression.

IN THEIR
OWN
WORDS

BRANDS NEED TO

STEP THEIR GAME UP

33%

When asked if a brand's marketing or messaging ever made them feel excluded, 15% say that they have felt excluded based on their race, 15% based on their social class and 33% have felt excluded by multiple aspects of their identity.

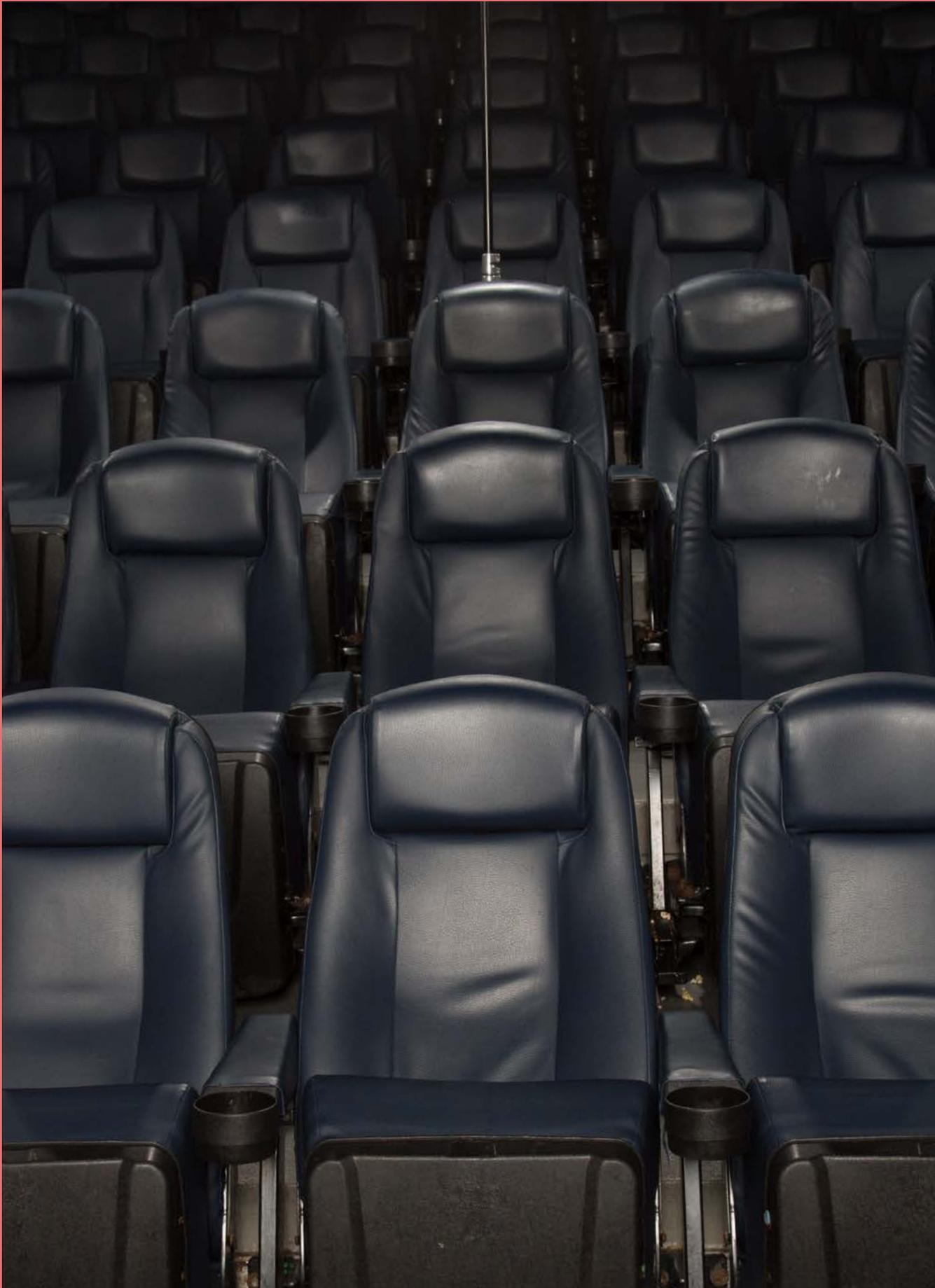
74%

say it's important for brands to use un-retouched images featuring real people in their advertisements and social media communications.

73%

say it's important that their favorite brand share their same values.





WHAT BRANDS

ARE GETTING WRONG

(in consumers' own words)

1 “Brands tend to use generalizations when trying to connect with consumers. Appearing neutral and speaking with generalized concepts can be boring. Nowadays, people want to see or hear about something specific, and they tend to disregard generalized subjects. Specific contents or materials make consumers pay more attention and engage in the topic.”

2 “Style transcends ageism... if you do it well you’ll be fresh at any age. Don’t market to a specific age group.”

3 “They’re attempting to be something they’re not to conform to me.”



TRENDS TO UNDERSTAND



1

Embracing Fluidity

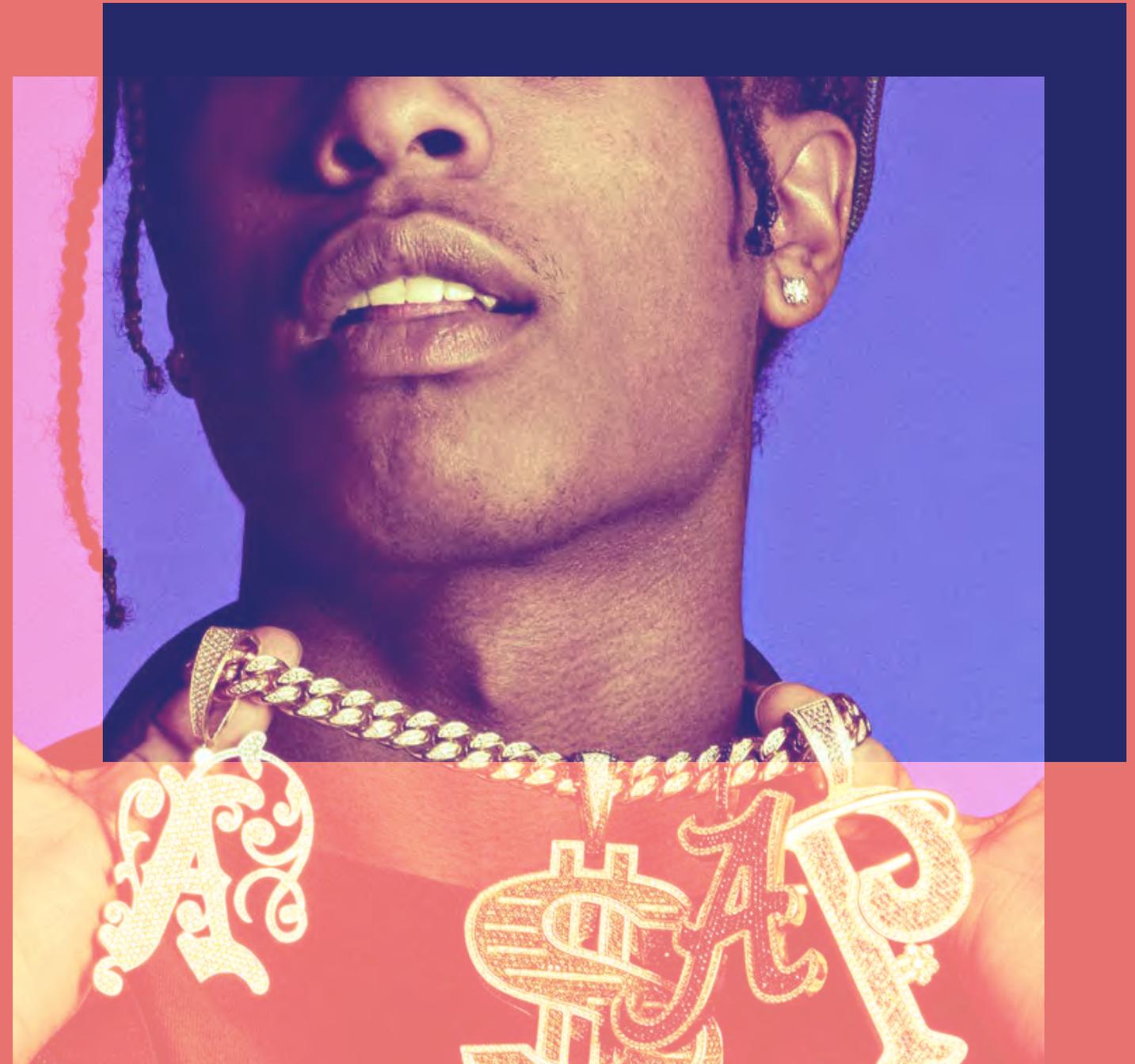
Embracing Fluidity

Young consumers are resisting restrictive labels and instead moving more fluidly between different social groups and cultural affiliations. In addition to breaking down cultural stereotypes and gender binaries, they're shattering boundaries when it comes to the things they consume. Embracing music and fashion that defies categorization, today's youth refuse to follow tradition and rebel against it by embracing ambiguity and fluidity.

This also means that the gatekeepers of culture have changed. Institutions like Hollywood and high fashion no longer hold the same power to dictate the tastes and beliefs of young people, and are in fact often left chasing bottom-up trends that arise via social media.

“The thing is that when I'm making music, I'm not really chasing that sound—the Atlanta sound that we hear a lot. I'm from Atlanta, but I don't really consider myself an “Atlanta rapper.” I would say my identity is more wrapped up in growing up in the internet age.”

LIL NAS X



A\$AP Rocky.

“What we're seeing now is a seismic shift in fashion, a widening acceptance of a style with no boundaries — one that reflects the way young people dress.”

KEN DOWNING

FASHION DIRECTOR, NEIMAN MARCUS

When subculture is all culture

52% 52% of Gen Zers think it is natural for every individual to belong to different groups and have no problem with moving between groups, according to a [McKinsey study](#).

Gone are the days when discrete subcultures like punks, goths, or even hipsters were seen as a cool form of rebellion against the mainstream. Today, it's edgier to forego group affiliation altogether rather than isolate oneself within one distinct category or clique. Kids mix and match the styles and lifestyles of different groups to find the combo that works for them, moving as easily between multiple expressions of identity as making an outfit change.

In an endlessly connected world of smartphones and social networks, word of mouth works in record time, spreading trends unbound by the limits of regions or traditional media. In response, fashion and culture's cycles of production and consumption have sped up exponentially, giving young people a glut of options from which to consume without loyalty.

This death of subculture has dovetailed with the rise of generations that are more diverse than any in the US before them. Today's young people seem to have an innate sense of acceptance, often fearless about rejecting binaries and boundaries they find unjust or unnecessary.



Billie Eilish.

“I just don't want it to put me in a box. I think a lot of LGBTQ+ musicians feel like once they come out, they get put into this box. I don't think any artist wants to just be put in a box because of their sexuality. It shouldn't define them. It's also just scary for people from middle school and high school to read about my sexuality, not that I care what they think, but it's just scary to feel so exposed. And just in general, being honest, and being vulnerable in any sense, is really scary.”

CLAIRO

Music goes genreless

78% 78% strongly agree that musicians, artists and other creators shouldn't be defined or limited to a particular genre and should feel free to mix different genres in their work, according to our Complex Collective Survey.

97% Nearly 97% of female Gen Zers say they listen to at least five musical genres on a regular basis, a survey by digital media company Sweet High found.

Contemporary musicians and their fans are major drivers of the move away from traditional labels. Over the past five years alone, countless artists have achieved success by moving seamlessly between genres, challenging the gender binary, and expanding the role of the pop star in contemporary culture.

This kind of aggressive genre-mixing challenges the music industry to keep up, defying the categories dividing things like Billboard charts, award shows, and festival line ups. Artists and their fans see the existing barriers between genres as arbitrary and limiting, and seek a similar freedom to self-identify that they do from traditional gender roles.

Notable artists who have seamlessly crossed genres include singer-rapper-flutist Lizzo, emo-rappers like Juice WRLD and Lil Peep, boundary-pushing "boy band" Brockhampton, trap-rock singer Post Malone, and even country-turned-pop superstar Taylor Swift. Young listeners gravitate to acts like trance-rap-pop punk-etc duo 100 geecs, who blend genre so dramatically it feels endlessly familiar but also like nothing you've ever heard before. They so perfectly capture through sound of the Internet mishmash that is the era that we live in. They've been largely accepted into this genre-less world, now touring with the equally genre-bending group Brockhampton.



Juice WRLD.

Lil Nas X is perhaps the most obvious example, whose single "Old Town Road" went viral in 2019 after surfacing on TikTok. The genre-spanning 'country-trap' song by the black, openly gay 20-year-old artist caused controversy among purists after topping the Billboard Country charts.

Rapper Young Thug is the natural antecedent of these heroes of genrelessness. In 2016, he appeared on the cover of his "JEFFREY" mixtape in a dress by designer Alessandro Trincone; the next year, he released "Beautiful Thugger Girls," an unapologetically country-influenced rap album.

Artists including Tyler, The Creator, who has made reference to same sex relationships in his lyrics but remains mum about his own personal life, and Bad Bunny, who often sports long, manicured nails, question conceptions of masculinity and challenge fans to accept a flexibility of identity they might never understand.

Clairo approaches both her personal identity and music/creativity with great fluidity. Her style is genre-less, and she's been very vocal about disliking labels like "bedroom pop". She's said that her biggest inspiration is the genre-less Brockhampton, who's really paved the way and opened the door for many other genre-less DIY artists to rise up. Her music largely centers around self-discovery, personal evolution and the fluidity of sexuality.

Entertainment outside the box

Today's viewers are challenging the traditional categories dividing film and television, as well. Majorly popular shows and films blend horror, comedy, drama, and beyond into content that speaks to the label-averse ambiguity young people have become accustomed to. In particular, this raises the question if awards shows and how they're broken down into granular categories even reflect how young fans think about creativity and entertainment anymore.

In HBO's *Euphoria*, actress Hunter Schafer and her character Jules are both openly trans, but this detail is just a small piece of her full identity and story. She grapples with desire, not gender identity, offering a much more modern and real portrayal for young audiences. Writers and consultants behind the show actually spent a great deal of time talking to trans people to hear their stories and perspectives in order to get the characters right. Schafer says, "There needs to be more roles where trans people aren't just dealing with being trans; they're being trans while dealing with other issues. We're so much more complex than just one identity."

Also from HBO, *Succession* blends and transcends genres in its depiction of the tragedy, sadness and despair that comes from abuse, neglect, and wealth. It's also largely populated with unlikable characters. And yet, the show is written, directed and edited much like a comedy. The show's nomination as a "Drama" at The Emmys sparked debate among fans.

Similarly controversial, Jordan Peele's *Get Out* was nominated for Best Comedy/Musical at the 2017 Golden Globe Awards. In truth, the film is beyond genre – more than comedy, more than horror, and more than social commentary – and to label it causes only debate and confusion. Peele's work proves that genre is secondary to the films' actual ideas.



Gender has become an equally divisive issue when it comes to award shows, where accolades are often separated into distinct male and female categories. MTV's Video Music Awards went genderless in 2017, and the rest of the entertainment world is slowly catching up. For 2019, the National Academy of Television Arts & Sciences dissolved its Younger Actor and Younger Actress Daytime Emmy awards, replacing them with a single Outstanding Younger Performer in a Drama Series.

Fashion goes genderless

39% Just 39% of teens prefer to buy shoes which are gender-specific, compared with nearly 57% of Millennials, according to [Ipsos](#).

44% Over a third of Gen Z respondents strongly agreed that gender did not define a person as much as it used to, and only 44% said they always bought clothes designed for their own gender, reports [Vice](#).

For many young people, labels like gender are just a matter of perspective. Clothing and beauty products have always been effectively genderless – it just depends who’s willing to put them on – but the marketing apparatus around them has long functioned along a strict binary.

As younger consumers challenge the traditional notion of luxury as arrogant and boring, fashion’s once-impenetrable defenses have come down, allowing new, young, and often non-white designers an opportunity to show their work and share their message on an international stage.

Look to influential designers like Telfar Clemens, whose eponymous brand transcends gender expression and class. In addition to blended runway shows and genderless casting, CFDA winner Telfar redesigned fast food uniforms, begging the question, why can’t White Castle uniforms be high-fashion, too?

For a long time, women were somewhat underrepresented in the world of street-wear. Now, more brands involve female designers and are conscious of female-identified wearers in their designs. While Noah is generally associated with Brendon Babenzien, the brand’s founder and designer, and former Supreme creative director, his wife Estelle Bailey-Babezien is just as crucial. Since relaunching the brand together in 2015, they have been focused on breaking down boundaries and changing conditioned thinking around gender. As a result, Noah has grown its reputation for delivering great product that appeals to anyone no matter what their gender, without specifically “gender-neutral” or “unisex” marketing or labeling.



Bad Bunny.

Celebrities like actor Timothee Chalamet, who could very well be this generation’s Leonardo DiCaprio, inspires fans with his androgynous style and modern masculinity. He frequently sports floral suits on the red carpet, and once wore a black, sequined harness to the Golden Globes – with his mother on his arm as his date. Though there has been speculation following his star turn in *Call Me By Your Name*, his young fans put more emphasis placed on his style and openness, femininity, and vulnerability, than his actual labeled gender and sexuality.

Other key influences include the Phluid Project, a New York City boutique dedicated to genderless clothing and merchandising. Even in some forward-thinking department stores that have moved towards genderless merchandising, shoppers are often still confronted with a choice between traditionally gendered fitting rooms. Phluid Project’s importance lies not only in offering non-gendered options or product lines, but in creating a space for anyone and everyone to feel comfortable without having to explain themselves.

After clothing, fashion’s next frontier is gender-neutral casting. Designers such as Eckhaus Latta, [Maison Margiela](#) and even [Louis Vuitton](#) have tapped non-binary models and influencers to represent their brands in fashion shows and ad campaigns.

The Takeaways

- 1 Young people today do not feel beholden to yesterday's cultural gatekeepers, and will evaluate content, culture and fashion based on their own standards
- 2 To create meaningful relationships with young people, embrace their flexibility and openness of spirit – without pandering to superficial ideas of what queer, or genderless should look like.
- 3 Redefine the concept of “unisex” as we knew it, imagining a more inclusive consumer culture where there's something for everyone, but no one's the same.
- 4 Look for opportunities to remove unnecessary boundaries perpetuated by previous generations. For example, non-gendered merchandising and fitting rooms feel natural to many young people.
- 5 Challenge your brand to rethink who it is choosing to collaborate with, and what it's asking collaborators to create. Go beyond the expected t-shirt collaboration between rapper or fashion designer, embracing creative types whose identity and medium are harder to define. Give your collaborators space and freedom to create something that is equally hard to put in a box.

Crafting An Identity

More and more, younger people are choosing to define and assert their own unique identities. Rather than viewing themselves as “either/or”, they are taking a “yes, and” approach that simultaneously embraces different aspects of their multifaceted personalities and heritage. Though they reject many of the labels foisted upon them by society, they wear their chosen labels as badges of pride.

There’s also a merging of physical and online identities, which, to many young people, has always felt inextricable. Social media gives young people a place to control



Rhuigi Villaseñor.

their identity and appearance, while avatars can serve as yet another tool for identity creation.

Young audiences are inspired by the multi-hyphenate success stories of artists who refuse to accept a single label or creative identity, instead expressing themselves across multiple modes and methodologies as they see fit.

Digital empowerment

71%

Our Complex Collective Survey found that 71% agree that social media is an important tool for self-expression.

60%

Nearly 60% of survey respondents say their output on social apps represents the real, everyday version of themselves, according to [JWT Intelligence](#).

61%

61% of Gen Z believe that video and photos help them to express what they want to say in a way that they can't with words, according to [Snapchat](#).

Digital avatars provide an opportunity for people to control their own personal presentation. Snapchat's Bitmoji and Apple's Memoji go beyond the smiley face, allowing users to manipulate and communicate with emojis created in their own image. This is a trend growing beyond texting, with opportunities for players to control their own digital representation in video games including NBA 2K and Fortnite, and [Genie's](#) 3D avatars appearing in the place of celebrities. NBA 2K even hosts exclusive sneaker drops within its in-game Foot Locker store.

Emojis have been subject to criticism over a lack of inclusiveness and, though app developers have worked to reflect a more diverse user base, there's still blind spots. Some young people are taking representation in tech into their own hands, rather than wait for Silicon Valley to catch up. [O'Plerou Grebet](#), a 21-year-old student from the Ivory Coast, created Zouzoukwa African Emojis, a collection of over 350 symbols referencing West African culture. Going beyond emojis with a range of skin tones, apps like Grebet's expand the visual language of emojis to reflect the lives of a greater number of people.

In representing themselves online, some young social media users have gravitated towards memes as a new language for describing themselves and learning about others. Though perhaps superficial on the surface, it's a form of nonverbal communication that reaches across many of the divides young people find arbitrary anyway.

This trend extends to heavier subjects like race, giving young people more tools with which to communicate about difference and identity. A song from Lin Manuel-Miranda's musical In The Heights inspired a TikTok [meme](#) in which users pointedly riff on their own identity and answer to the question, "What are you?" regarding their ethnic background.

Enabling expression

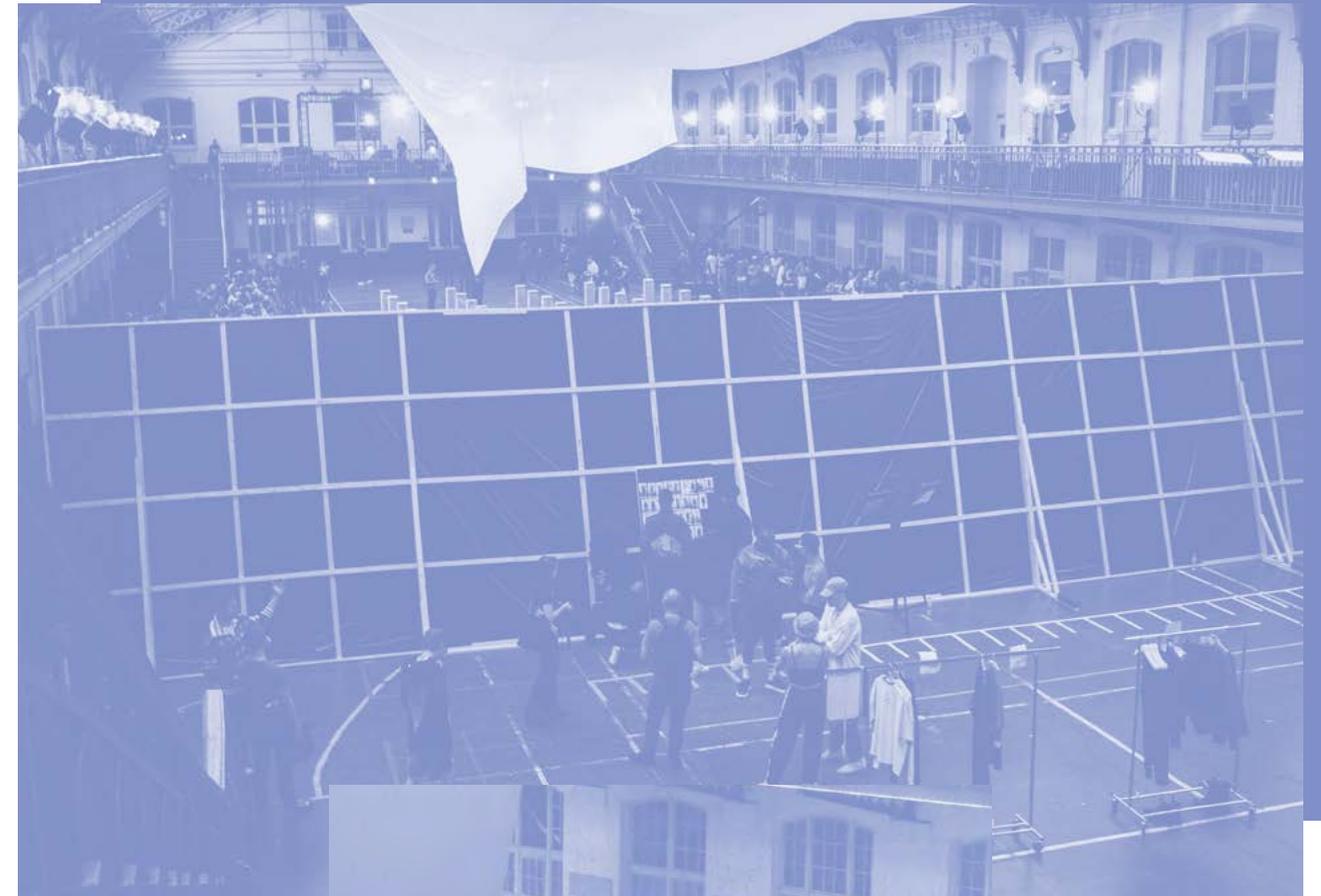
78%

In our Complex Collective Survey, 78% of consumers say that people should have the ability to define their own identities instead of having society apply labels to them.

Some brands have stepped in to help their customers to express their own chosen identity, particularly for those who have not or cannot legally change their gender or name. More than just inclusive marketing, these changes are especially meaningful as they recognize and literally empower people to exist the way they want to.

After expanding its list of gender identities, which it claims led to over 80 million new matches among its members, dating app Tinder has partnered with LGBT rights organization GLAAD to provide its users with more options to express their sexual orientation in their dating profiles. Instead of having to choose just one option for their orientation, users can select up to three terms, including bisexual or asexual, in order to more accurately describe their individual identities. By adding this information, Tinder's algorithm is better able to tailor its matches for each member.

Similarly, Mastercard's True Name program allows transgender and non-binary customers to use their chosen names on their credit cards without requiring a legal name change. Airlines are beginning to accommodate chosen identities as well. Earlier in 2019, United Airlines was the first to offer a non-binary gender option within the travel booking process.



Multi-hyphenate mindset

76% 76% of consumers strongly agree that their passions and interests are an important part of their identity, according to our Complex Collective Survey.

In the past, celebrities and other creators who chose to expand outside their original platform or medium have been criticized as dilettantes, getting their hands in too many places where they don't belong. Now, high-profile multihyphenates like Virgil Abloh and Rihanna prove it's possible to excel – and be taken seriously – with many labels, and young people see no reason why they can't create anything, in any way they want. This has been particularly visible in the crossover between music, art and fashion, as artists move seamlessly between designing, recording, producing, modeling and back again, collaborating with a diverse swath of fellow creatives along the way.

Fashion designer Recho Omondi, of her eponymous label OMONDI, is an outspoken fashion critic through social media and her podcast The Cutting Room Floor. She's blurring what it means to be a creator and a critic, and is challenging the idea that a designer should remain behind the scenes. She has a very fluid way of thinking about her label's branding, always evolving from one singular message and incorporating more than just clothing – OMONDI represents everything from streetwear to podcasts to concerts.

Verdy, the designer behind Wasted Youth and Girls Don't Cry, moves fluidly between creative projects. Sometimes acting as fashion designer, sometimes graphic designer, he also runs the Wasted Youth skate team. Rhuigi Villaseñor of RHUDE takes a similar approach, blending his creative output between fashion, art, painting and furniture design.



Rhuigi Villaseñor.

We asked our Complex Collective members who they admire most, and they said:

“Kid Cudi. Because of everything he has done for pop culture over the last 19 years. Not only in music but in fashion, acting, producing, etc. He is an innovator and paved the way for so many artist today.”

“A\$AP Rocky. He has a IDGAF attitude that transcends his art. He merged fashion and hip hop and continues to think outside of the box.”

The Takeaways

1 Part of the most diverse generation in history, many younger consumers see inclusivity as a given and expect to feel represented by the brands they shop with.

2 They still value individuality and uniqueness and look to interact with brands that they feel understand them, or offer something that can align with the rest of their identity.

3 Don't expect customers to fit seamlessly into categories like demographic or style; instead, give the audience the freedom to choose and create their own labels.

4 Opportunities to build new personas and control their online presence resonate with younger consumers.

5 Look for opportunities to empower talent to explore aspects of their creativity that they may not have had the time or resources to do previously. This can lead to the creation of more unique content, and inspire fans to develop their own multi-hyphenate identity as well.



Creating Community



Creating Community

For younger consumers, their pop culture affiliations are a crucial part of their identity, and the internet has enabled them to connect with like-minded fans around any shared interest or passion, no matter how niche, often turning their shared passions into new creative projects of their own, like the members of the group Brockhampton, who met on a message board for Kanye fans.

Just as young consumers feel less beholden to things like genre or category, the boundaries of physical reality are equally permeable. Living so much of their social lives online,



young people can easily find themselves bonding with friends around the world through platforms like Fortnite and Twitch – many of whom they will never meet in real life.

Festival-inspired experiences

81%

81% of consumers agree that it's important to be able to connect with other people who like the same things they're into, according to our Complex Collective Survey.

66%

According to [NRF](#), nearly half of consumers attended at least one 'retailtainment' event in the past year. This jumps to 66% for Millennials. The most popular type of events were early/exclusive access to items (50%).

82%

82% of consumers who attended a retailer event in the last year are interested in attending similar events in the future.

Despite a dependence on digital devices, studies find that younger generations crave experience and still prefer shopping in store over online. To tap into this, brands can create third spaces, where like minded people can come together and exchange inspiration.

Recognizing the popularity of music festivals among young people and the festival's role as a vehicle for brand engagement and sales, brands across categories can celebrate and validate these obsessions by giving fans a way to be a part of the story through real-life experiences and environments.



ComplexCon.

Beauty has been a key category for the next-generation festival. One of the largest, BeautyCon, has evolved beyond free makeup samples to offer attendees experiences including musical performances and conversations about financial literacy and women in business. Sephora's Sephoria House of Beauty, the "Coachella of beauty," is a similar consumer-facing industry event offering two days of immersive, festival-meets-trade show events and branded installations. These events create opportunities to bring beauty enthusiasts together in real life, connecting with like-minded consumers as well as their favorite influencers.

ComplexCon embodies the growth of a niche community into a massive, high-profile event that gets larger every year. Devoted to sneakerheads, streetwear collectors and other members of "the culture," the event has grown to include numerous brands as well as musical performances, brand activations, and opportunities to customize or land exclusive product.

Digital Connection

71% In our Complex Collective Survey, 71% agreed that social media is an important tool for self-expression.

80% 80% of Gen Z and 77% of Millennials said they feel better understood about their passions by people in their specialized communities than their Facebook friends. Nearly three quarters (73%) of Gen Z and Millennial respondents trust responses from their specialized online communities more than those from people in person or on Facebook, said a report by [Taptalk](#).

#1 The [National Research Group](#) found that Fortnite is the No. 1 service teens are using, and audiences cite its social elements as the primary motivators for playing: it's the best place to be my authentic self and to connect to what everyone is talking about, making me feel like I'm not alone.

"I don't think it's that hard anymore for this younger generation to find people they identify with. Social media obviously makes it easier. You can find somebody on Instagram who posts the same things and wears the same things as you."

KARIZZA SANCHEZ
DIRECTOR OF CONTENT STRATEGY, COMPLEX

The concept of community has expanded beyond the limits of physical reality, as young people increasingly interact, transact and bond online. To this generation, interaction online is no less meaningful than it is in the real world, and the internet continues to offer forums where close knit, niche communities thrive.

[Spotify's Fans First](#) initiative bridges online and IRL, utilizing listener data to identify top listeners and strengthen fanbases. Bringing online fans into real life concerts and events, Spotify rewards top fans of an artist with special offers like concert tickets and access to private events.

Gaming is the definitive alone-together activity. Multiplayer network games like [Fortnite](#) have exploded in popularity, powered in part by the online interpersonal activity built into the game. After acquiring group video chat app Houseparty, Fortnite rolled out a new mobile chat feature called Party Hub. Now, players can keep in touch and interact online even when they're not playing.

Though gamers often find each other and build communities online, some relationships extend into the physical world. Members of [rap collective YBN](#) first found each other while freestyling in a chat on Xbox live. Starting out with Youtube uploads and Twitch.tv streams, the group eventually met up in Los Angeles, producing YBN Nahmir's viral hit "Rubbin' Off the Paint."

Some digital communities explicitly target users looking for a cure for loneliness. [Twitch](#), which was originally designed to live stream video games, has developed a gentler side thanks to streams from makeup artists, photographers and painters, all looking to find connections across the world. Savvy brands have already tapped into this power of the internet. Reddit-based campaigns like [Sprite's](#) "You Are Not Alone" campaign in Latin America, which targets users of Reddit forums where people might have come feeling different or left out, helps foster a conversation around a former taboo topic like mental health and allows people to find comfort in their shared experiences.

YBN Cordae.

Style tribes

73%

73% of consumers say it's important that their favorite brand share their same values, according to our Complex Collective Survey.

61%

61% of Millennials and Gen Z express a preference for brands that have a point of view and stand for something, found [Kantar Consulting](#).

Online and off, young people are interacting with fashion in a meaningful way that goes beyond shopping to incorporate other interests, beliefs, and affiliations. More inclined towards activism than their predecessors, younger generations are looking for brands that stand for something, support their beliefs, and care about their customers.

Stores can act as social hubs, bringing together fans in a physical space for product demonstrations, events, or just to hang out. The New York outpost of Japanese outdoor brand [Snow Peak](#) has quietly become a beacon for fashionable city dwellers looking to learn about camping and outdoor equipment.

Once a focus of community among sneakerheads, the line outside a drop has in many instances been usurped by ecommerce and apps like Nike's SNKRS. Though there are still active sneaker forums on the internet for fans to gather, there is a new white space for brands to communicate with this crowd in a way that brings fans together in a physical community environment.

Young female-identified brands in particular are building new physical and digital spaces in which to explore categories generally dominated by men. [Skate Kitchen](#) and [Brujas](#) are two New York-based female skateboarding collectives and streetwear brands, driven by community and shared aesthetic that embraces gritty realness over polished perfection. With diverse membership and strong Instagram presences, the two groups have managed to create a welcoming, inclusive environment for young women that transcends the traditional brand experience.



Copycatted is a new app for people to seek and share product recommendations that haven't been influenced by advertising and paid promotions. The company's messaging is peak Gen Z, answering questions like "Isn't consumerism bad tho?" by encouraging its users to shop more consciously and stating their platform welcomes "girls, female-identifying people, and anyone who cares about the ideal sneaker to wear with a slip dress and the perfect not-vintage-but-could-pass-for-it jeans." Though the content thus far is geared towards beauty products and women's clothing, the site welcomes all users and emphasizes the importance of confidence over consumption.

"[Closet accounts](#)," or Instagram accounts devoted to documenting the outfits of celebrities by their superfans, combine the rabid fandom of stan culture with a tireless interest in fashion and beauty. Account moderators, often teenagers, race to identify the brands and items worn by their preferred star; popular ones include Rihanna, Emma Chamberlain, and Kylie Jenner.

The Takeaways

1 Consumers are increasingly comfortable with experiences that bridge the physical and digital worlds, so marketers should think big when creating community-building experiences on and offline.

2 Nurture devoted fans with dedicated spaces built around shared points of interest, delivering meaningful experiences they can't get via ecommerce or social media.

3 Give your customers opportunities and tools to communicate with each other – as well as your brand. Look to examples like Glossier, which has successfully grown its

audience by giving its superfans the ability to interact with and participate in the brand's digital presence, as well as a voice when it comes to new product development and marketing.

4 In a time of record levels of reported loneliness, stores and online communities can serve as an important meeting place for young people to connect in an authentic way.

5 Ensure that branded spaces, whether online or off, feel inclusive and democratic. Though today's youth may love niche communities, they reject exclusive groups that put up barriers for entry.

Redefining Exclusivity

Redefining exclusivity

These days, the concept of luxury and exclusivity have little to do with price. Today's shoppers are increasingly seeking one-of-a-kind products and experiences as a way to showcase their personal identities— and flex on social media. As a result, younger generations are driving an interest in customized clothing and accessories, as well as vintage fashion, in addition to their well-documented love of hype and exclusive streetwear. In a time when a \$40 T-shirt can sell out in minutes, what does it mean for something to be unique, and what makes for a covetable item among today's youth?

“[W]hen it comes to selling to the next generation of consumers [brands need to bring] together the old and the new to effectively create a compelling offering. Although these consumers want everything available at the touch of a button, at the heart of their experience they still want to preserve individuality.”

LUCY WARD
MD, TROUVA



Morgenstern's.

“We take it back to the individual. [They can] express themselves creatively without the limitations that they might find elsewhere. You don't need to teach Gen Z about the necessity of being inclusive and diverse.”

PETER SEMPLE
CMO, DEPOP

For the clout

75%

75% of consumers agree that they enjoy using social media to share one-of-a-kind products and/or exclusive experiences, such as limited-edition sneakers or secret concerts, according to our Complex Collective Survey.

67%

67% of Gen Z luxury consumers and 60% of Millennials have purchased special editions, compared to 40% of Gen X and 20% of Boomers, according to a [study](#) by BCG and Altagamma.

Manufacturers like Nike Inc., Adidas AG and Puma AG have accelerated sneaker releases as fickle young consumers demand more and more novelty. Kanye West's Adidas Yeezy line, for example, released six versions in 2015, 12 in 2018 and already 19 this year, reports [Business of Fashion](#).

Streetwear and its culture has taken hold of the mainstream imagination, helping usher in a new era of casual dressing, reigniting logo-mania, and effectively democratizing the concept of luxury. The concept of the "drop" has extended far beyond its original environs, as brands and influencers use limited or surprise releases to get young people lining up for everything from Kylie Jenner's lip kits to Popeye's chicken sandwiches – then posting about it on social media.

The drop isn't limited just to streetwear. Morgenstern's Finest Ice Cream, a small chain based out of New York City, entices fans with super limited edition ice cream bars and collaborations with talent like Action Bronson.

Independent film distributor A24 has supported some of its features with thoughtful strategic partnerships and clever items that go beyond branded merch. For the release of Barry Jenkins' *Moonlight*, for example, it released a limited edition book featuring an introduction by Frank Ocean, which quickly sold out. For releases including *The Witch*, *Hereditary*, *Midsommar* and *The Lighthouse*, A24 partnered with psychedelic brand Online Ceramics for a series of tshirts dedicated to each film.

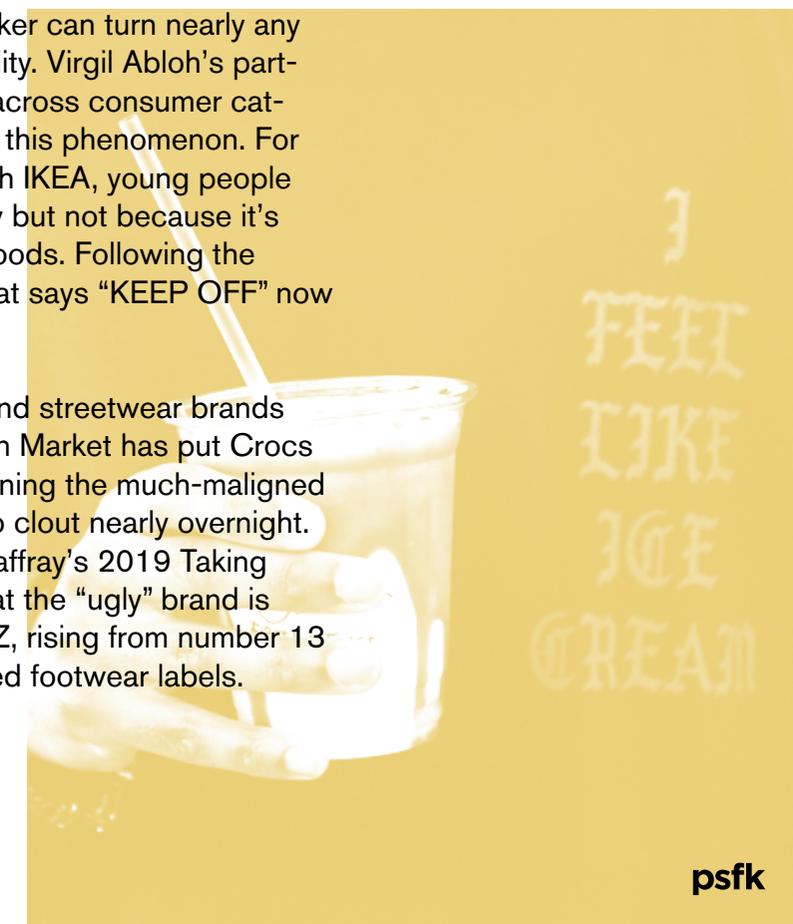
Product releases limited to a dedicated event or location build extra bragging rights into acquiring it, advertising that the wearer was at the right place at the right time. At the 2019 Coachella music festival, adidas used Apple's Airdrop to send randomly selected attendees a free pair of Nizza sneakers from the brand's collaboration with singer Donald Glover. Those who accepted the request were rewarded with a coupon and instructions on how to claim their new pair of shoes.

The sign off from the right tastemaker can turn nearly any brand or object into a hot commodity. Virgil Abloh's partnerships with unexpected brands across consumer categories is the premiere example of this phenomenon. For example, after his collaboration with IKEA, young people who might shop there by necessity but not because it's cool suddenly covet the brand's goods. Following the collection's 2019 release, a rug that says "KEEP OFF" now sells for over \$700 on StockX.

Collaborations with Post Malone and streetwear brands including Pleasures and Chinatown Market has put Crocs back on the cultural map, repositioning the much-maligned plastic clog from cultural disdain to clout nearly overnight. To prove Crocs' relevance, Piper Jaffray's 2019 Taking Stock With Teens survey found that the "ugly" brand is gaining market share among Gen Z, rising from number 13 to number 7 among teen's preferred footwear labels.



Morgenstern's.



FEEL LIKE ICE CREAM

One-of-a-kind

7.2% Gen Zers are 7.2% more likely than previous generations to say that having a unique style is "very important" to them, according to OC&C Strategy Consultants.

41% According to Deloitte, 41% of consumers are interested in personalized clothing, and for 16 to 24-year-olds, that number jumps to 53%. Moreover, 1 in 5 is willing to pay up to 20% more for goods that are personalized.

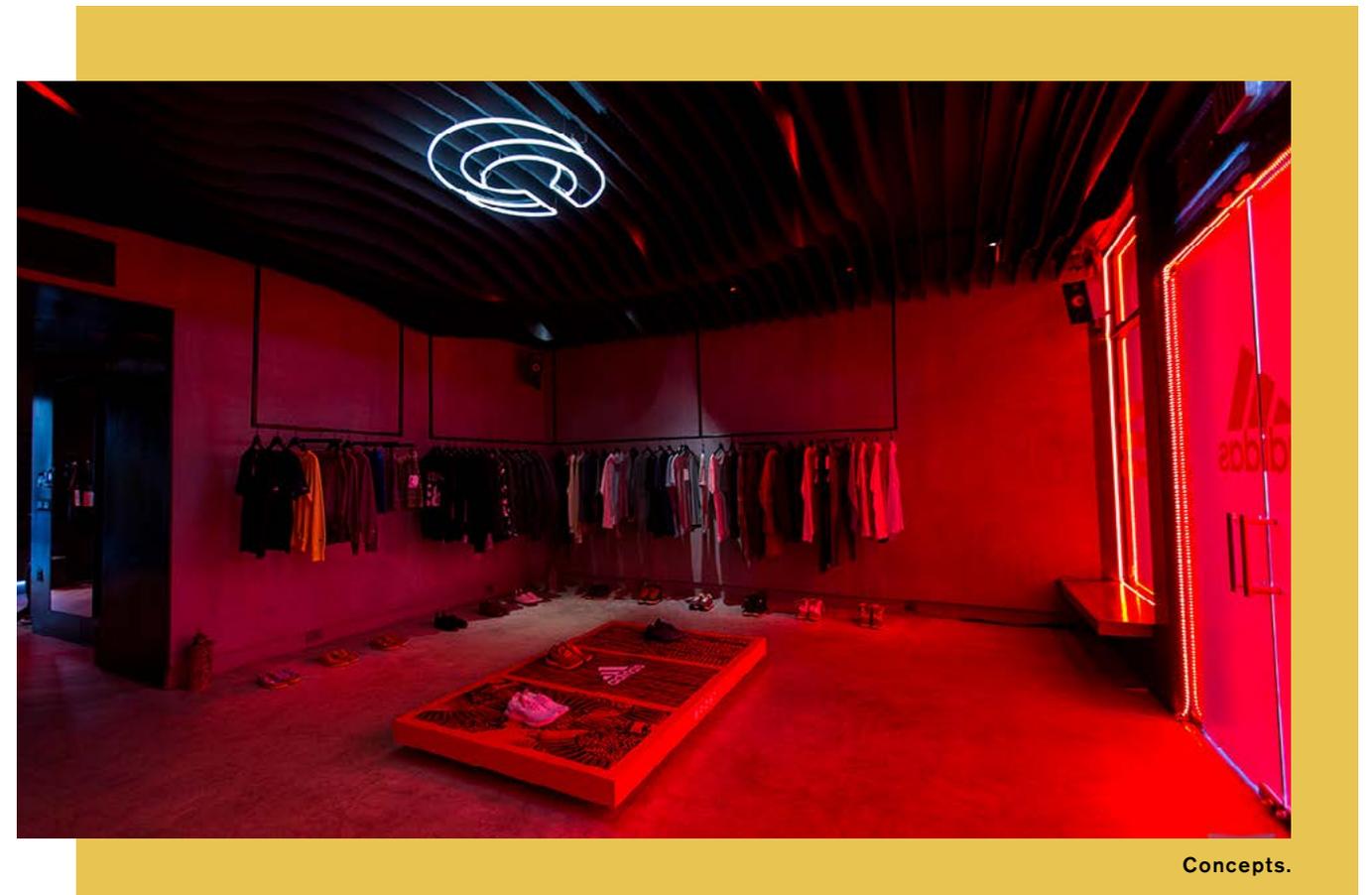
80% 80% of consumers are more likely to make a purchase when brands offer personalized experiences. 90% of consumers find customization appealing, reports Epsilon.

The new exclusivity isn't just about hard-to-get, but really more so about hyper-personalized experiences and products. Brands can meet young consumers' expectations to not be put into a box by giving them something that feels individualized. From that hyper-personalization will come the feeling of exclusivity. There's nothing more exclusive than something made just for you.

This uniqueness extends to the store and brand experience. The Nike Melrose store in LA offers a hyper-personalized shopping experience, using localized sales data to curate an assortment specific to the needs and preferences of that audience. Atlanta boutique A Ma Maniere's hospitality offering customizes guests' suites according to their Instagram account and a custom profile.

Concepts sneaker store in Boston reskins the entire store for a limited time around timely product drops; for example, the store got an oceanic theme for the Lobster Nike Dunk drop. Service can be personalized as well. SSENSE's Montreal flagship allows customers to pre-order items they see online, and have those pieces ready for the person to try on at the store when they arrive.

Custom or personalized items appeal to younger consumers' sense of individualism while also speaking to a cohort powered by streetwear's hype machine. In addition to being a means of self-expression, on-demand customization can add sentimental value to an item, and a feeling of co-creatorship between customer and brand.



Concepts.

Sneakers are a key category for customization. In addition to Nike's By You program, which has featured collaborations with streetwear labels like Heron Preston, a collaboration between the sportswear giant and Cactus Plant Flea Market put a fun spin on the customizable shoe. Called the Sponge By You, there were over 117,000 possible combinations of details for customers to personalize their own Blazer shoe.

For a truly unique pair, online retail platform The Custom Movement offers thousands of made-to-order sneakers – mostly Nike Air Force 1s and Vans models – customized by a member of a community of verified artists.

Denim brand Levi's developed a novel technology that enables denim wearers to do what they've always been doing: using at-home methods of making denim their own, like sitting in a bath for the right fit or adding distressed knees. Future Finish is an online customization platform that uses proprietary laser technology to let shoppers create hyper-personalized jeans, choosing from different tints, patterns, distressing and other finishing options.

As automation becomes more sophisticated and technology like 3D printing more inexpensive to utilize, retailers will have even more opportunities to scale on-demand tailoring and other custom product offerings.

Vintage comes back around

51% A recent report from [ThredUp](#) showed that the secondhand market has grown 21X faster than the retail apparel market over the past three years and will reach \$51B in 5 years. 51% of resale shoppers plan to thrift shop even more in the next five years, with millennials and Gen Z adopting secondhand 2.5x faster than other age groups.

25% 1 in 6 Americans will shop at a thrift store during a year, according to [America's Research Group](#). Downloads of peer-to-peer marketplace apps grew 25% in 2018, according to App Annie's [State of the Mobile](#) report. [Vogue Business](#) reports that 90% of Depop's 15 million active users are under 25 and inventory categorized as streetwear rose by 60% in the past year.

The rise of individualism and desire for sustainability has correlated with growing interest in thrift store shopping and vintage, giving rise to a massive secondary market for clothing and accessories. For young consumers who came of age at the height of fast fashion, vintage provides a unique alternative to the mass-produced items churned out by trendy and inexpensive retailers. With decades' worth of clothing at hand, young people feel less beholden to the trends of the moment and have all the more options to pick and choose from when constructing their own visual aesthetic.

Vintage clothing has proven a surprisingly resonant category across style tribes and trend cycles, powered in part by the exposure of Instagram. Sellers like Procell, Round Two and Fantasy Explosion in particular cater to the streetwear set with vintage t-shirts and designer goods. In their Los Angeles store, Gallery Department combines one-of-a-kind and vintage appeal by allowing visitors to customize vintage denim in house.

Vintage expands young people's access to the world of fashion. Marketplaces like the RealReal, ReBag, ThredUp and Grailed give young people a means of interacting with luxury brands at a more accessible price point.

Combining two shopping experiences known for the "thrill of the hunt," high-end outlet chain Century 21 built a designer vintage assortment into its merchandising of Next Century, a department of the downtown New York store designed to appeal to a younger, hipper demographic. Other department stores are embracing vintage, including London's [Selfridges](#), which welcomed a popup from Gen Z-favorite app Depop over summer 2019, featuring a curated selection of items from Depop's top sellers.

Peer-to-peer platforms, which combine the model of eBay with the content of Instagram, are particularly resonant with a younger consumer who has come to consider reselling a natural step in the retail experience. With over 15 million users worldwide, [Depop](#) is one of the go-to apps for buying and selling vintage clothes and streetwear. The platform offers users many of the same brand-building tools offered to influencers on Instagram, encouraging sellers to create unique content and leverage personal identity to build sales.

This entrepreneurial spirit is one element at play in the ascendance of streetwear culture to the mainstream. Flipping high heat sneakers and limited release items from brands like Supreme and Palace has become a lucrative side hustle for some industrious young people. It's driven the rise of digital secondary marketplaces like StockX, Grailed and GOAT, as well as brought brick-and-mortar retailers like [Stadium Goods](#) to the attention of Farfetch, which acquired it in 2018.

For the average young shopper, these platforms allow them to participate in a rapid trend cycle in a way that is both more affordable and more sustainable. It's easier now than ever for kids to purchase an item, whether vintage or new, and sell it rather than wear it again. Once it makes the requisite appearance on Instagram, customers can recoup some of the money back and invest it in new purchases.

The Takeaways

1 You can't manufacture hype, and younger consumers are hard to fool when it comes to selling them on a so-called must-have product.

2 Collecting customer data is only part of the customization equation – young people don't want to feel like they're being reduced down to a set of metrics for an algorithm to crunch. Instead, brands need to focus on delivering a level of meaning and value that speaks to their specific passions and needs.

3 Consider the context around an item as it relates to its covetability. Does it signify that the owner attended an exclusive event or drop? Does it give them an opportunity to wear something no one else has?

4 Embrace co-creation, giving customers the opportunity whenever possible to have a part in the development process - either weighing in on design decisions along the way or customizing the final product.

5 Consider the possibilities of the secondary market. Many brands can capitalize on a rising interest in unique vintage items by building resale and authentication into their business models.

A B O U T



ABOUT PSFK

PSFK is a research company from New York City that tracks the latest global innovation developing at the intersection of culture and entrepreneurialism. With a network of researchers around the world, their membership-style offering helps a mix of tech-firms (e.g. airbnb, Samsung) and lifestyle-brands (adidas, Nike) understand the latest trends and how to deliver the best brand customer and retail experiences. They also work with leading media companies like Complex Networks to share thought leadership into new consumer insights.

Find out more and sign up for our weekly newsletter: www.psfk.com

I ABOUT COMPLEX NETWORKS

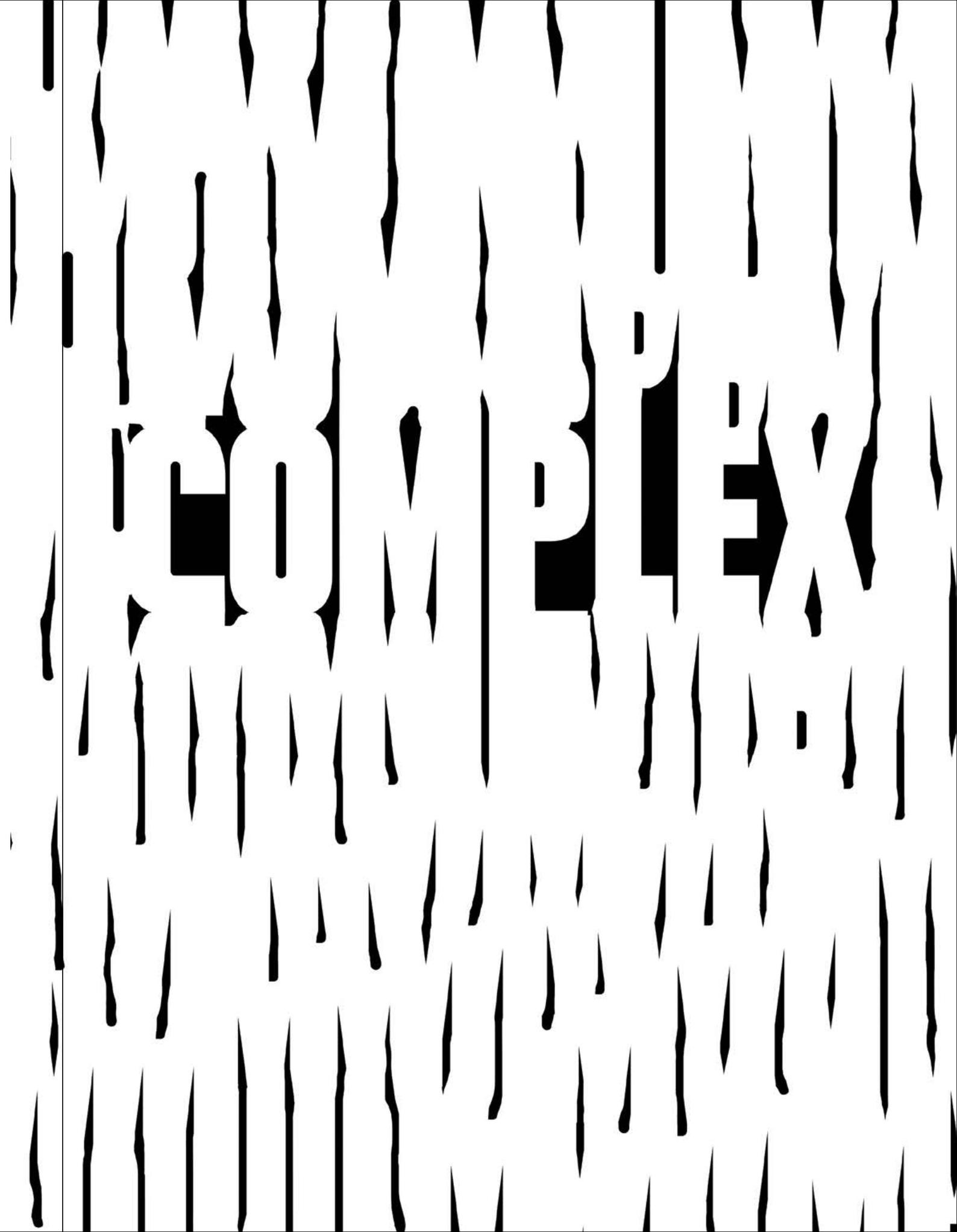
COMPLEX COLLECTIVE & CLIMATE

[Complex Collective](#) is Complex Networks' primary research and insights product, providing partners a direct line into a large, always-on consumer panel of high-intent and diverse young people from all over the world. Complex Collective consists of proprietary behavioral insights, custom first party segments and profiles across a range of demographics, hypothesis and product validation, and trend reports that offer insight into the rapidly changing attitudes and trends in youth culture.

[Climate](#) is the product development, marketing and youth consultancy arm of Complex Networks. Leveraging audience insights from Complex Collective, and 17 years of building and scaling successful product businesses, Climate was formed to partner with brands who are looking to build their next product.

COMPLEX NETWORKS

Complex Networks is a global lifestyle brand and media company and one of the most influential voices in popular culture today. Complex Networks' digital channels, which include Complex, First We Feast, Pigeons & Planes, Sole Collector and more, is a Top 10 publisher in the U.S. for social engagement on channels like Facebook and YouTube. A diversified and profitable media business with premium distribution partners such as Netflix, Hulu, Pluto TV, Roku, and iFlix, Complex Networks' original content exemplifies convergence culture, exploring topics that span across popular culture from music to movies, sports to video games, fashion to food.



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