Source: Polina Tankilevitch via Pexels

THE MOVE
Gen We and
The Digital World

WE ARE

THE MOVE

A next-gen cultural insights platform, powered by a globally diverse, hyper engaged Gen Z community.

We are cultural decoders; we put an unfiltered spotlight on their voices, and offer brands a real-time source for cultural relevance and future-focused thinking.

Source: Mike Von via Unsplash

Gen Z has been coined the 'loneliest generation' – and it would be easy to understand this as having only been exacerbated by the pandemic but as always, things are never as they seem with Gen Z.

Younger generations are setting new rules for the digital world. They are using the internet to carve out new digital communities that function as kinder and more meaningful spaces. It's no surprise that during the extended periods of enforced social distancing, niche communities spread like wildfire, bolstering their significance.

Unlike Millennials, who use the digital space as a place to centre themselves and platform their thoughts, aligning with more traditional, feed-centric platforms, Gen Z, as digital natives, are creating a public/private distinction amongst platforms, and are increasingly moving to closed group communities where they can experience freedom and privacy in the digital space. These communities however, are not tribes; Gen Z are more fluid than their

Millennial counterparts and can belong to several communities organised around interests.

Gen Z has a fundamental understanding that the collective is stronger than the individual when trying to have their voices heard. They work and have been raised by each other online to learn in group dynamics and work for the collective. As a result, brands need to look beyond the features they currently offer to what young people crave – a tangible sense of belonging. Gen Z doesn't simply want to buy what your brand is selling, they want to be a part of what you stand for.

In this report we look at how Gen Z, motivated by feelings of belonging are rewriting the internet by investing in digital communities.

Summary of findings

01

Gen Z are celebrating Individuality through community.

02

Gen Z do not feel seen on traditional social media channels.

03

Gen Z are using digital communities to create a kinder internet.

04

Gen Z are organising online to make themselves heard IRL.

05

Gen Z are not allowing for brands to opt out of participatory culture.

Methodology

Source: Polina Tankilevitch via Unsplash

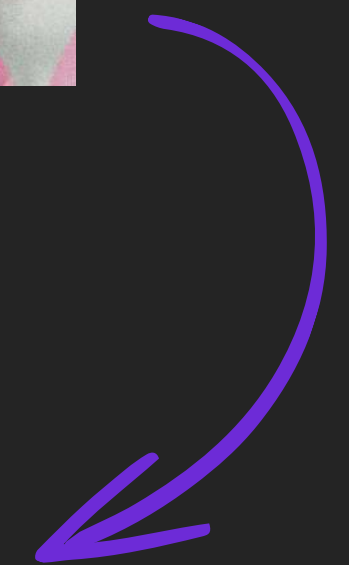**02**

An online survey completed by 350 members from our global community of Gen Z early adopters across the UK in November 2021.

Source: Vonecia Carswell via Unsplash

01

Desk research and community observations.

Source: Polina Tankilevitch via Unsplash

03

In-depth interviews with 10 community founders, leaders and members.

The Move Community Panel

MERLIN, 22
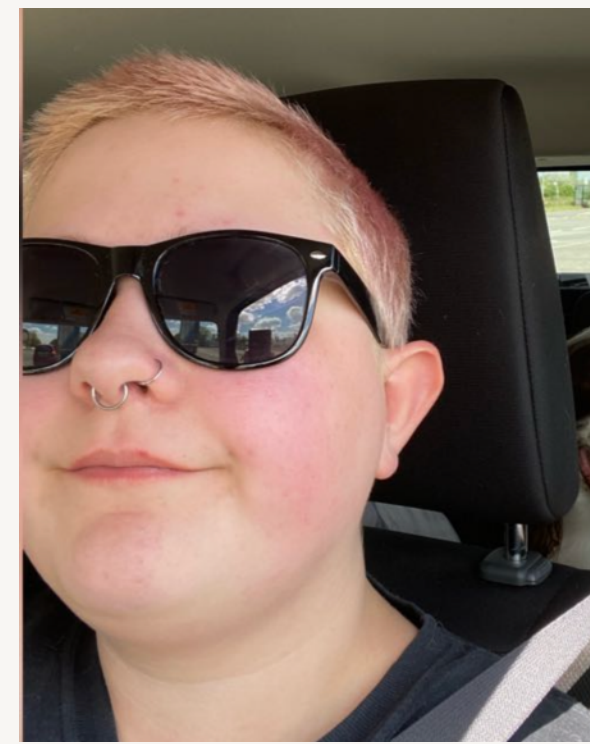LONDON

SARA, 18
EDINBURGH

KRIPA, 23
LONDON

ALEX, 25
BRIGHTON

SHAMIRA, 23
BIRMINGHAM

PERCY, 20
EXETER

NIHAD, 34,
LONDON

NAIMA, 18
LONDON

LEAH, 21
SURREY

NEILA, 22
LONDON

Gen Me to *Gen We*

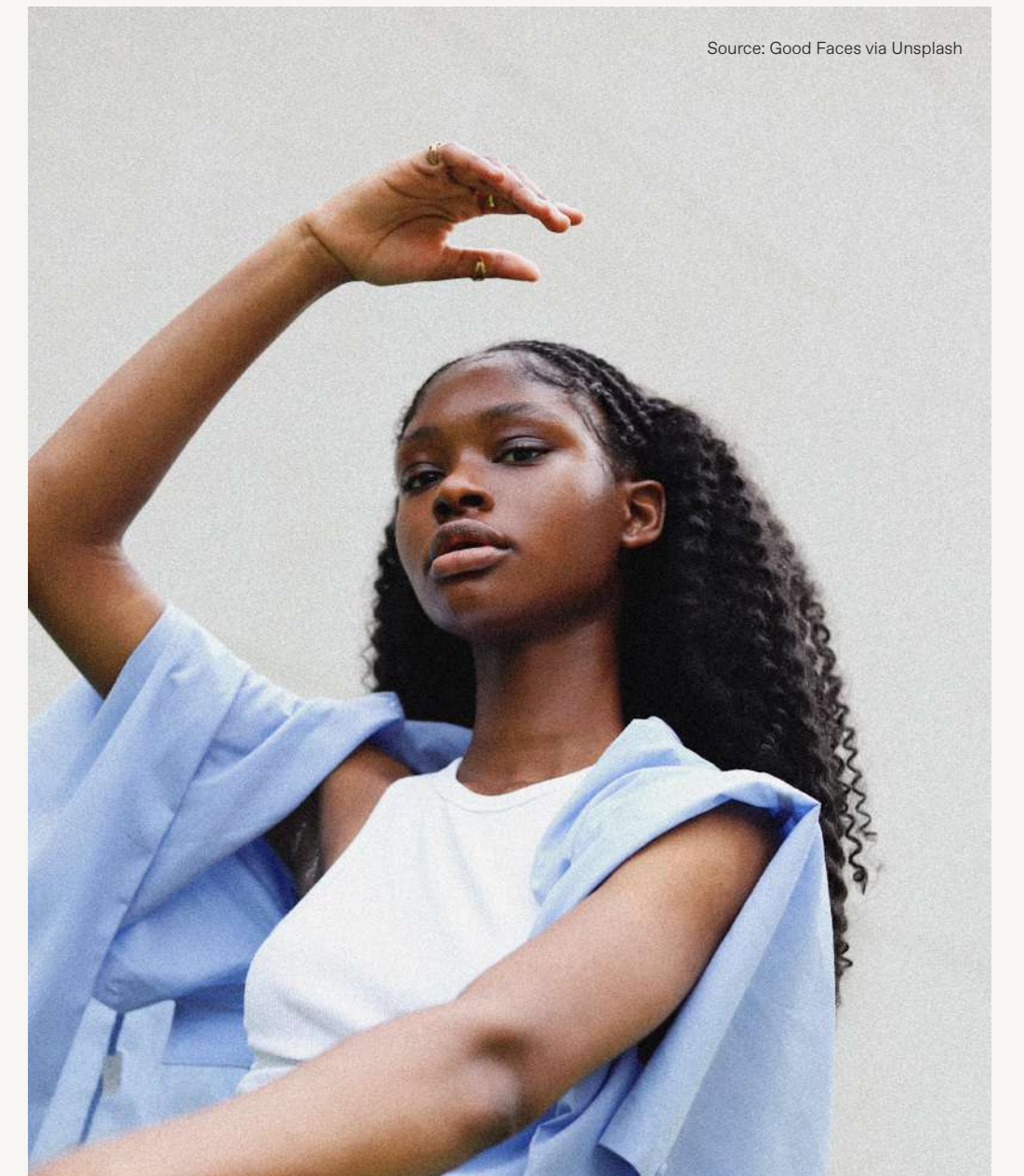# A balancing act: Hyper *Individualism & Collectivism*

Individuality and self expression are priorities for Gen Z. They embrace differences and like the challenge of finding newness in everything. Growing up online meant that for this generation, there was more emphasis during their formative years to forge their own identity, whether that meant approaching learning on their own terms through the point of view of knowledge building via youtube, or starting their own fashion brand.

Gen Z are reframing outdated social constructs and creating new ones; brands that do the same will resonate with them,

as they are naturally drawn towards brands that celebrate self-expression, empowerment and most importantly, difference.
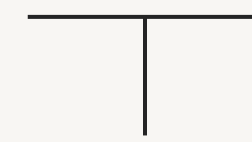
But individuality and community are not exclusive. Gen Z have come of age in a time of great social change and have witnessed digital and IRL collectivism in action. Compassion is in their DNA and caring is the new cool. Gen Z are Gen We. This feelings focused generation understands the world through systems and as a result recognise that they are more impactful together.

There is a growing movement of celebrating individuality through community. Gen We are using these communities to vocalise their emotions, both to solve problems or to express and embrace their vulnerability and imperfection.

Source: Good Faces via Unsplash

67 %

of our Gen Z audience say
they are active members
of a community.

THE MOVE COMMUNITY, 2022

82 %

of our Gen Z audience
actively want to be part
of a community.

THE MOVE COMMUNITY, 2022

Source: SHVETS Production via Pexels

"Yes individuality is important to me, but going through the world alone is exhausting; I think communities even if it is just a Reddit page allows you to find and connect with others in a very particular way."

PERCY, AGED 20
BASED IN EXETER
THE MOVE COMMUNITY

Source: Jed Villejo via Unsplash
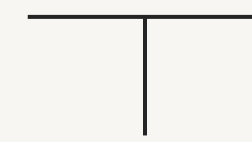
70 %

of our Gen Z audience say that being part of a community makes them feel more like individuals.

THE MOVE COMMUNITY, 2022

63 %

of our Gen Z audience strongly agree that being seen as an individual is very important to them.

THE MOVE COMMUNITY, 2022

By giving users multiple ways to connect and communicate with one another Depop were able to build community out of *hyper individualism*. The platform is now filled with micro-communities that amass around different aesthetics and styles.

Source: Depop

Source: Polina Tankilevitch via Unsplash

Identity is fluid and *Gen We* are celebrating *individuality* through *community.*

Source: Polina Tankilevitch via Pexels

Web 3.0

THE WEB EVOLUTION

WEB 3.0

WEB 2.0

WEB 1.0

**2006 - PRESENT
WEB 3.0**

Known as the **Semantic Web** – it refers to the evolution of web utilisation & interaction – altering the web into a database. It enables the up-gradation of the back-end of the web after years of focus on the front-end.

It promises to establish 'the world's information' in a more reasonable way than Google can attain with their existing engine schema, and necessitates the use of machines to reason about information and make new conclusions, not simply match keywords.

**2005 - 2018
WEB 2.0**

Known as the **Participative Social Web** – it refers to worldwide websites that highlight user-generated content, interaction and collaboration in a virtual community.

It doesn't refer to a modification to any tech spec, but the way web pages are designed and used.

**1991 - 2004
WEB 1.0**

First stage of **World Wide Web evolution** – few content creators, majority of users consumers of content.

Personal web pages are common, consisting of static pages hosted on ISP-run web servers or free web-hosting services. Ads on websites are banned.

Source: Anna Shvets via Pexels
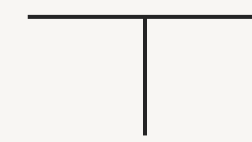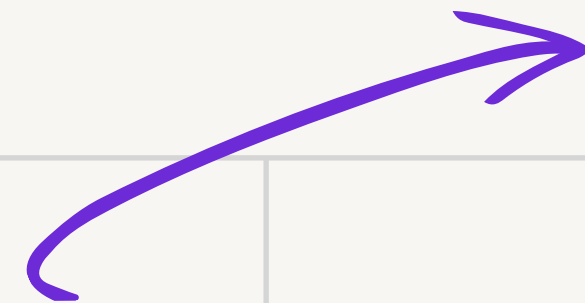
Web 3.0 and DAOs are *redefining community*

Web 3.0 takes the concept of online community one step further through Decentralised Autonomous Organisations (DAOs) — organisations in which bylaws, goals, and missions are decided by the community members. A DAO's governance and operations are written in smart contracts and enforced on the blockchain, meaning every single transaction is viewable to all.

Although this sounds very technical and abstract we are still very much in the early stages of web 3.0 meaning that the online behavioural shifts are tangibly easier to understand. For instance, the notable shift of younger generations moving towards online closed communities is part of the decentralising of the Internet. Over the last century powerful machine learning has expanded the internet wide enough to allow for smaller digital 'zeitgeists' to form. Web 3.0 has given Gen Z another dimension to their online experience. They are now able to draw private/public lines. Treating their closed communities as private spaces for them to be their complete selves.

The move away from feed-centric social apps such as Facebook and Instagram – which offer algorithm dictated content – to closed or open community platforms like Discord, Twitch or Reddit highlights Gen Z's desire for long-form more meaningful connections. The decentralised Internet is allowing Gen Z to find refuge in their corners of the internet and engage with those who share their interests and values.

The rapid evolution from the traditional online community to Web 3.0 will add a new aspect to Brand's ever-changing relationship with consumers, traditional segmentation – location, age, social grade, etc – are quickly becoming outdated; instead brands need to spend time finding relevant social crossovers in the virtual landscape.

✳ ✳
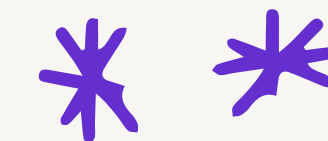
*Ajeir Cunningham, Exploring 3.0, medium,2021

Source: Shingi Rice via Unsplash

65%

of our Gen Z audience said that they feel more confident online when using community-focused social apps like Discord or Twitch over feed-based apps like Instagram or Twitter.

THE MOVE COMMUNITY, 2022

"I run a rainbow6 gaming community on Discord with about 150 people, and having this space has given me the opportunity to find people who enjoy playing the game the way I do. I am still part of the larger group but being able to break out into smaller communities is amazing; *you get to filter out so much* and just enjoy your time more."

MERLIN, AGED 21
BASED IN LONDON
THE MOVE COMMUNITY

Source: Good Faces via Unsplash

Source: Shvets Production by Pexels
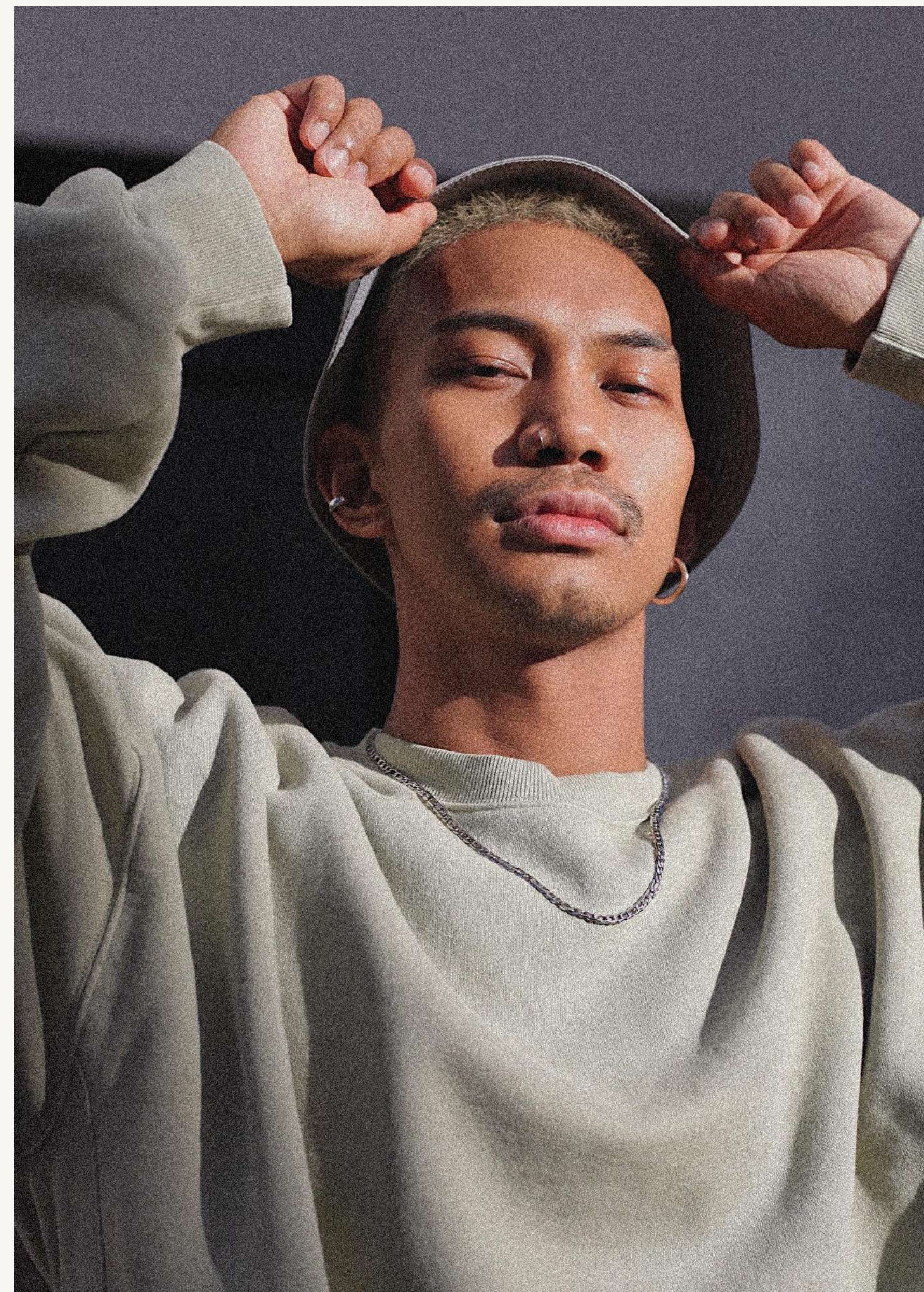
41%

of our Gen Z audience think of closed community platforms as private spaces online.

THE MOVE COMMUNITY, 2022
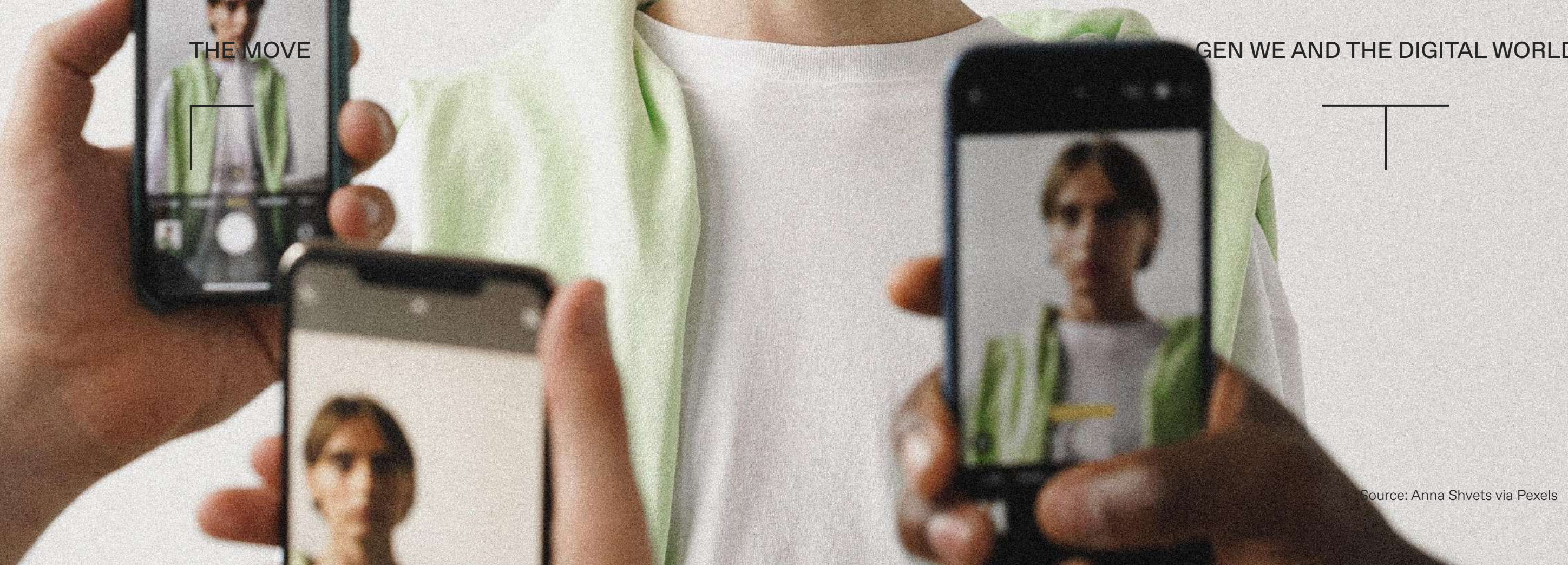
IMPERO

Source: Billie via Unsplash

How Gen Z envision the internet is how the internet will evolve in years to come. Gen Z engineers, developers, investors and entrepreneurs all signal that young people *see decentralisation as positive,* and blockchain adoption as inevitable.

Feeling *seen*

Source: Anna Shvets via Pexels

Gen Z are constantly finding new communities that *shape* their sense of self and identity.

On a journey of self discovery, Gen We regularly seeks out new communities online that shape their sense of self and identity. Community involvement is fluid – they freely participate across any number that feels relevant –and it's where they can express themselves authentically. In a confusing, fragmented world, communities are also where they can connect or be recognised for who they are.

Identity and belonging are incredibly important to Gen Z with over 70% of our Gen z community stating that online communitie feed their need for belonging. A foundational component of belonging for Gen Z is having a voice and that voice being valued. Online communities, by design, are smaller, controlled platforms that allow for longer forms of discussion, content sharing to a smaller audience, shared emotions and instant feedback leading to more intimate forms of connection.

Like many of us, community is important to Gen We because it stems from what they are in the market for — belonging and identity. Brands like Supreme, Glossier and GymShark, don't just sell best-in-class fashion, skincare and fitness, rather they thread core values into their identity and invite those that identify to join their brand. These brands opt for telling stories and leveraging existing cultural sentiments to build community movements.

*Andrew Batman, Forbes, 2022

Gen Z's motivations for *joining communities* outside of shared interests are deeply rooted in feelings of belonging and value.

70 %

66 %

61 %

BELONGING

VOICE

PRIVACY
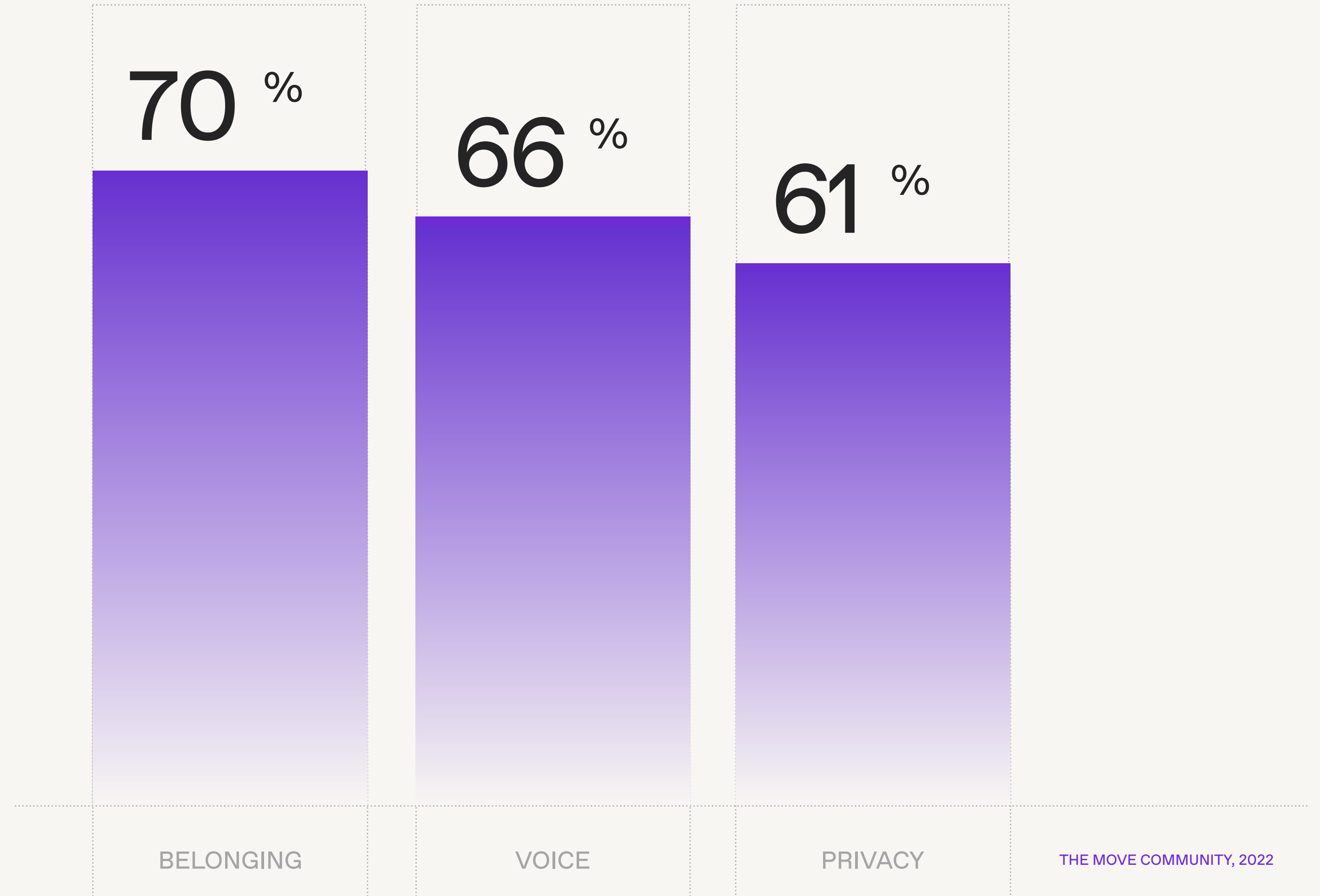
THE MOVE COMMUNITY, 2022

Source: Good Faces via Unsplash

More than

76%

of our Gen Z audience feel like they have a voice and social capital within their digital community.

THE MOVE COMMUNITY, 2022

Source: Cottonbro via Pexels

Feeling seen beyond traditional social media channels.

Over the past year, Gen Z has been hit the hardest with pandemic isolation – strung the farthest apart from traditional communities (interest-based activities, geographies, and campuses), and relegated to pixels on a screen. Quickly it became apparent that traditional social media platforms like Instagram or twitter were not providing enough opportunities for real connection. Our Gen Z community reported feelings of 'digitally drowning'- a feeling most apparent when their photos or videos that they spent hours perfecting does not receive the attention they think it deserves.

But in true Gen we fashion they are fighting back. Gen Z community founders are taking up space on traditional feed social media platforms to build empowering communities. Leah founder of 'Checkmates' a mental health social media app that allows you to check in with your friends/chosen community when you feel down, has stressed to us the importance of not retreating to closed groups but rather staying on platforms like instagram and building more healthy and positive spaces by investing in community. Brands should look to tapping into this feeling and look for opportunities to allow for Gen Z to 'feel seen' through their existing social strategy.

Deloitte, 2021

"It's very important to me that I run my mental health community on Instagram as opposed to closed Slack channels or Discord, because it's on Instagram that young people are being made to feel bad. So taking up space on these apps and creating communities in public feed spaces is a way of *fighting the algorithm*. "

LEAH, AGED 21
BASED IN SURREY
THE MOVE COMMUNITY

Source: Good Faces via Unsplash

43%

of our Gen Z audience feels
their online presence lacks
the impact that they would like.

THE MOVE COMMUNITY, 2022

"Sometimes I feel like the posts I put so much effort into get swept up amongst the millions of pieces of content posted everyday. But when I post an outfit pic in the my streetwear reddit community *I get instant comments* and it never feels like they're being shady."

NAIMA, AGED 18
BASED IN LONDON
THE MOVE COMMUNITY

Source: Polina Tankilevitch via Pexels

Communities are where *Gen We* can express themselves, and in a confusing, fragmented world, communities are also where they can connect or be recognised for who they are.

Peer *Power*

Source: Cottonbro via Pexels

Values-based online communities out perform all others for feelings of *empowerment* and *motivation* with Gen Z.

Gen We are hustlers– but not to the point of obsession. They dream big, but more importantly, they get things done. In their eyes, social collective progress is more important than individual success. By using social media, they have been able to form micro-online communities to help mobilise support for new causes and issues. These issues and communities can be bucketed under five main themes: mental health, sustainability, inclusivity, rights and safety, and accountability.

Gen We value safety and financial security, having grown up during the last global recession and unstable economies. Still, there's a big emphasis on carving out the right path and finding resourceful and creative ways to get things done. Peer Power is not confined to 'changing the world'. Values based online communities provide inspiration and empowerment among Gen Z that makes them mobilise by sharing content and recruiting outside of their community, 86% of our Gen Z audience saying communities feed their emotions with entertainment, inspiration, and joy as the top emotional benefits.

Our research highlighted that values-based communities have lower brand penetration. Although it can be tricky to strike the right tone when talking about societal issues, brands should not stay away but rather look for opportunities where their values overlap with Gen We.

The Gen Z Equation - WGSN, 2020

62%

of our Gen Z audience say entertainment, inspiration, and joy are the top emotional benefits of online communities.

THE MOVE COMMUNITY, 2022

81%

of our Gen Z audience say that they rely on their online communities to inform them on what they should do to help when it comes to social causes.

THE MOVE COMMUNITY, 2022

Source: Anna Shvets via Pexels

Source: Rodnae Productions via Pixels

"I just think younger people understand that more can get done when we listen and work together. There is no point in doing our own thing separately if we share the same goals, even if we disagree on how to get there. *We can figure it out and compromise.*"

SARA, AGED 18
BASED IN LONDON
THE MOVE COMMUNITY

Gen Z Mafia, is an online networking platform and community aimed at challenging what they consider to be the elitist, exclusive values of Silicon Valley, Gen Z mafia focuses on collaboration and connection between peers, the name riffs on 'PayPal Mafia' and is hosted on Discord. Users connect to share tips and ideas, collaborate on builds together, and seek out employment connections and funding.

With the tagline *'Zoomers, not Boomers'*, Gen Z Mafia is building the tech world they want to see from the ground up. Since its launch, hundreds of people have joined, including college and high school students, founders, and young employees at tech companies and start-ups.

Source: Jason Henry
for The New York Times

Canvas 8,2021

Founded during the pandemic, Flock Together is a monthly birdwatching community aimed at combatting the *underrepresentation* of Black, Brown and People of Colour in the British outdoors and nature landscape.

They have since gone on to work on outdoor-focused projects with Uniqlo, Timberland, Gucci X Northface, Berghaus and Fila while centring their cause and providing these brands with access to their unique audience.

Source: Jason Henry
for The New York Times

Participatory culture

Source: Darina Belonogova via Pexels

We are moving from the *creator* economy to the *participatory* economy.

Source: Polina Tankilevitch via Pexels

Freedom of Participation creates community

We feel connected to what we create, and Gen Z loves sparking conversations and creating user-generated content, all of which expands the potential of the brand. Brands that curate community for their customers/users are inherently providing Gen We something they demand. Offering this demographic the freedom to explore and create alternative stories for the brands they love is more democratic and creates new opportunities for communities. This includes the co-creation of new and exciting output and the ability to engage with brands in deeper and more enduring ways by positively shifting the relationship from consumer to advocate.

Conventional brands can choose to stamp out these community-driven initiatives, as Nike did by suing MSCHF for selling Lil Nas X's unauthorised 'Satan Shoes'. Or, they can choose to lean in, as Disney did in welcoming Ratatousical, a collective musical. Led by Ratatouille TikTokers, people shared their own renditions, which were edited together to create a virtual Broadway adaptation. Over 200 million people watched the crowdsourced Ratatouille musical, making more than $1 million in ticket sales in just a few days and demonstrating the power of community participation in expanding a brand's influence.

And amid a sea of brands offering similar products with little differentiators, the brands that stand out are ones that are inclusive to Gen Z and allow them to join in rather than simply purchase products. Participation is an expectation in community. It empowers customers to go from audience to creators and net promoters by evolving brand love into brand advocacy.

Canvas 8, 2021

83 %

of our Gen Z audience agree
that brands should allow fans to
use their IP to create content online.

THE MOVE COMMUNITY, 2022

36 %

of our Gen Z audience say that
their fandom identity helps to define
how they see themselves.

THE MOVE COMMUNITY, 2022

Source: Good Faces via Unsplash

Fandoms are *key* to Gen Z's identity, give them a hand in carving it.

Brands should look beyond the narrow understanding that Gen Z turn to Interest-based communities to have fun to reach a new generation of consumer advocates. While true, Interest-based communities are providing brands with a highly engaged and invested crowdsource of feedback, innovative ideas and support. Consider Marvel, for instance; the media franchise created excitement for its LGBTQIA+ and cosplay communities by employing progressive superheroes to battle stereotypes of modern culture, including homophobia, racism, sexism and ageism. This representation is resulting in success at the box office. Brands that actively listen to its wider communities- being led by their voice and actioning their output to be a more direct reflection of the community will find it easier to navigate the constantly shifting cultural landscape.

Canvas 8,2021

Source: Anna Shvets via Pexels

"Using music, films, tv shows is such a big part of the way we communicate on the internet – if brands want to claim ownership and start shutting down creators they will definitely face backlash. *I would definitely stop supporting them!*"

ALEX, AGED 25
BASED IN BRIGHTON
THE MOVE COMMUNITY

Brands can make community a core part of their marketing strategy by shifting their mindset from *'ownership' to 'participation'* and engaging with consumers in genuine ways that help uplift them and their voices.

Source: Social Cut via Unsplash
and Olia Danilevich via Pexels

So what does this mean for *brands?*

01

Throw away traditional audience segmentations!

Geography, age and gender offer a one-dimensional framing of values and attitudes that are decreasingly relevant when it comes to understanding – and targeting – Gen Z as a group. Aided by digitisation, the death of tribe thinking, and open-learning resources, activists and enthusiasts are coming together completely rewriting traditional understandings of audiences.

02

To earn your place, have a *POV!*

What do you stand for? Do consumers know? Gen Z is three times more likely than older generations to say the role of business is to 'serve communities and society.' If you want to build a community among this demographic, having a purpose that is authentically rooted in your brand's values and operations – and aligns with Gen Z values – is the foundation.

04

Hand over the *keys!*

Gen Z is a force of creativity. If you really want to engage them, you've got to move beyond viewing them as mere consumers or an audience to market to, and instead tap into their potential to help shape your brand. Participation is the new expectation, and it fuels a true sense of belonging, as humans feel connected to what we create.

03

Beware of the *power imbalance!*

To engage digital communities, brands must be wary of the power imbalances that exist between brand- consumer and between brand and community. Brands must take stock of what they are offering the communities they are tray to engage and be transparent and open to learning the rules from the community members.

Source: Polina Tankilevitch via Pexels

Want to dig deeper or have a chat?

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