

SEP 2020

Trends Report

2020

This is a living report that will be updated on a regular cadence so make sure you're subscribed to our website to get the updates.



For early access as a creator,
visit zebraiq.com/creators

**Zebra is a platform empowering
every creator to build a **business**
around your community.**

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 **24kGoldn**
#49 biggest artist

 **Ndamukong Suh**
Professional NFL player

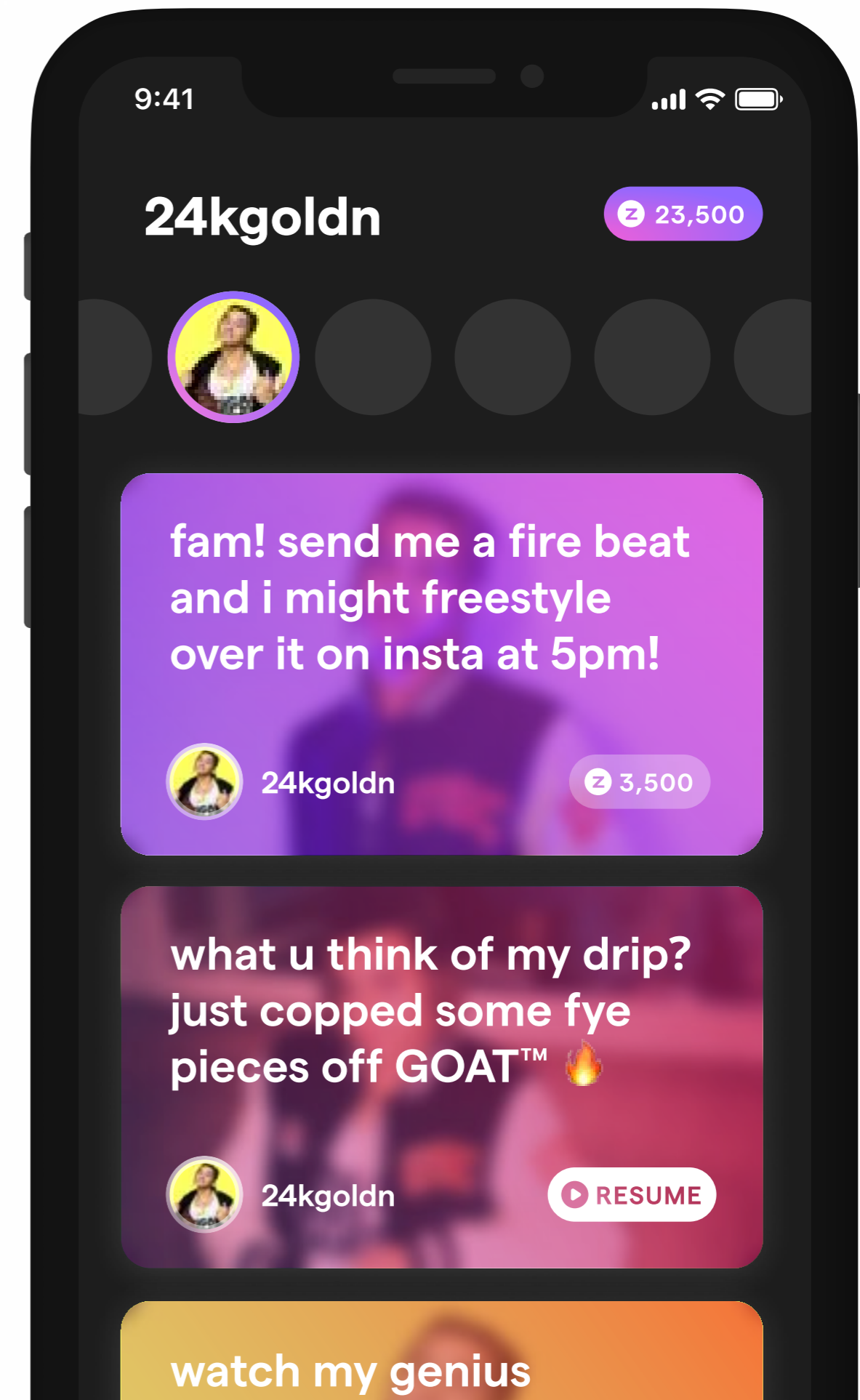
 **JustMaiko + Shluv**
#7 biggest TikTok star (40M+)

 **Alan Chikin Chow**
Official TikTok Ambassador



ZEBRA IQ

This is [@24kgoldn](#)'s community

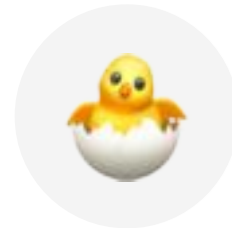


Before continuing, it is important to note that Black creators are the epicenter of culture.

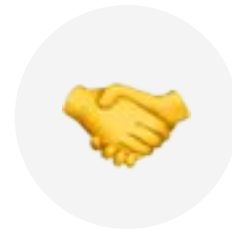
Throughout this report, we do our best to call out the ways in which Gen Z culture has been directly influenced by Black culture.

At Zebra, we strive to recognize and amplify the voices of Black creatives.

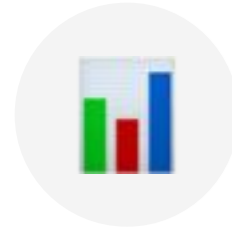
Who is Gen Z?



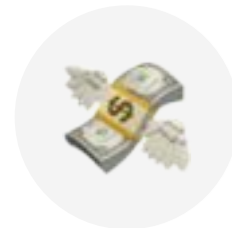
Born between **1995** and **2010**



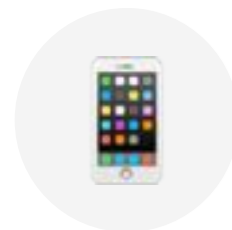
3 billion of them worldwide



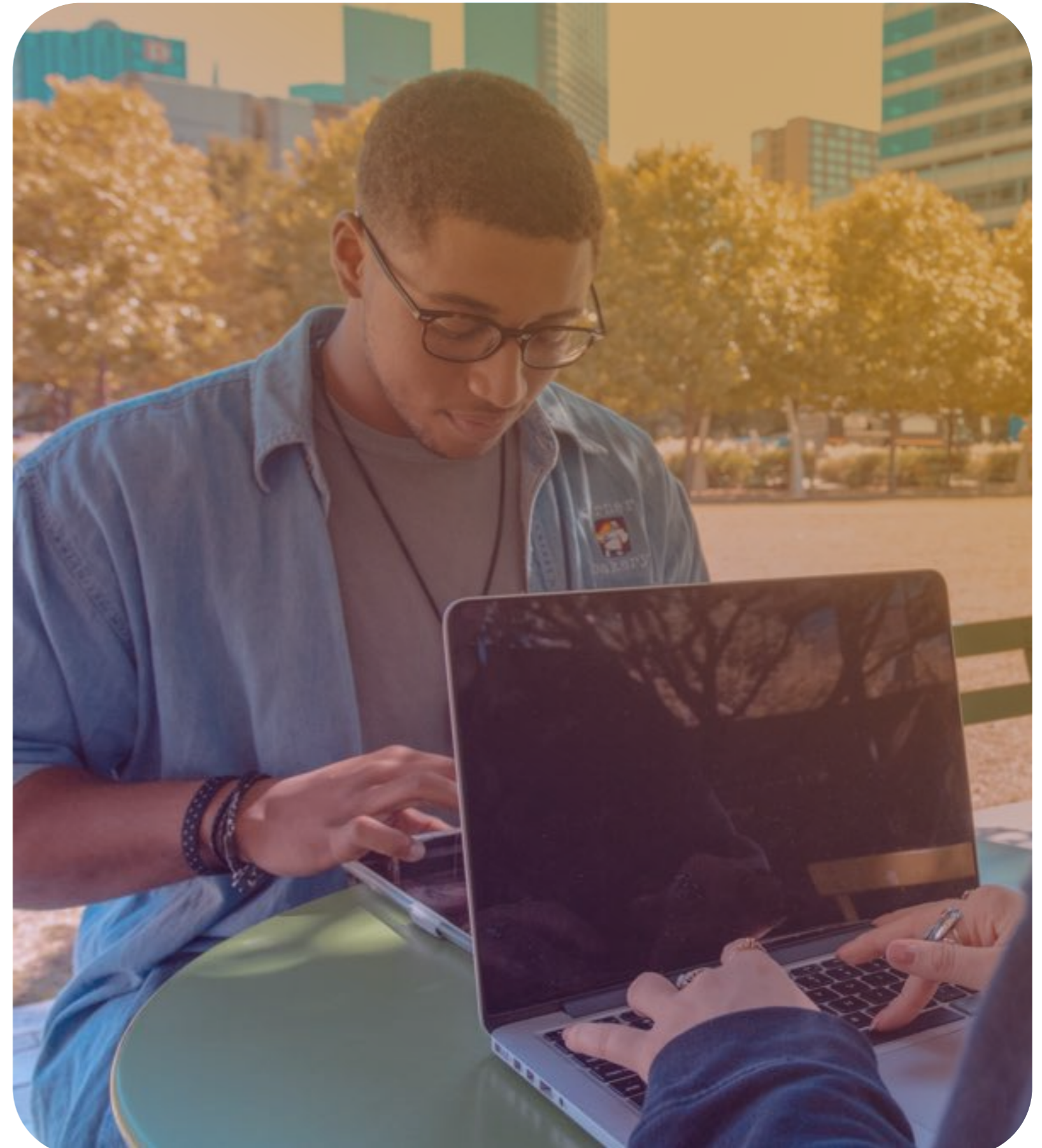
35% of the global population



\$143 billion in spending power



The mobile-first generation



Who is Gen Z?

Word Cloud ☁️

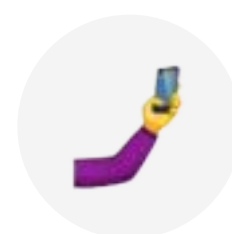


Content Breakdown

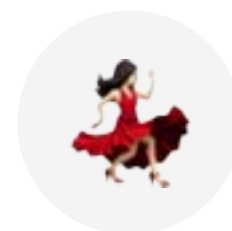
	Page No.		Page No.		
1	Communication	8	7	COVID-19	50
2	New Spaces	14	8	Money & Work	56
3	Content Creation	22	9	Activism	62
4	Fashion	32	10	Sports	77
5	TikTok	36	11	Up & Coming	88
6	Influencers	44	12	Creator Brands	105

1 Communication

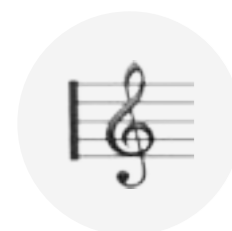
A **video-first** generation



65% of Gen Z prefers **FaceTime** to keep in touch with friends



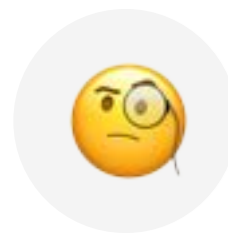
Video chatting while multitasking is **easy for Gen Z**, scary to others



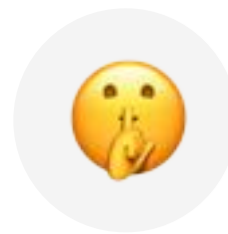
Mobile video is how Gen Z keeps up with self-education & news



Ironic, emoji-driven messaging



Before jumping into a trend or replying to Gen Z, ask yourself — **are they being serious?**



If you know, you know!



Tiffany Zhong ✓
@TZhongg

Latest trend on TikTok: mean fairy comments

What is a mean fairy comment?

Bittersweet comments that turn real sour in the 2nd half

Example below:



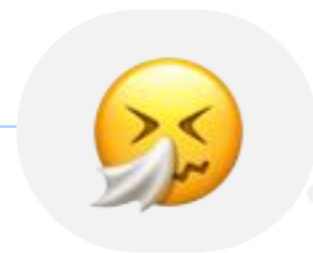
Emoji **dictionary**

Culture has given
harmless emojis
different meanings



looks like **a literal cowboy**

often means **fake happiness** covering up sadness, anger



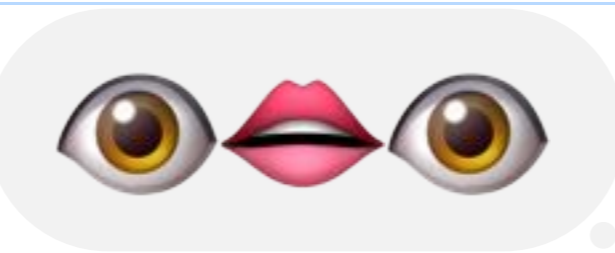
looks like **sneezing**

often means an indicator of **doubt** or **frustration**



looks like **just a happy face**

taken as an *extremely* **passive-aggressive** smile

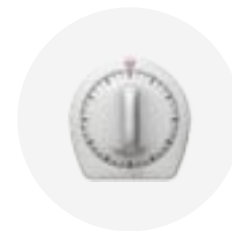


looks like **a face**

used to mean surprise, anger, or **disgust**

used when someone posts questionable content

Talking the **talk**



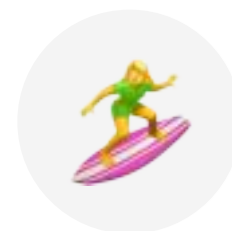
Think mobile-first — use **short-form video** and **get to the point quickly**



Understand **trending emojis** and **memes**



Look into **all possible interpretations** of your creatives



If you're trending, **buy into the meme** and ride the wave!



Take @njgov for example 🙌

New Jersey @NJGov · 10h
well, would you look at the time...

113 4.4K

New Jersey @NJGov · May 26

43 779

New Jersey @NJGov · May 27
I just took a dna test turns out I'm 100% that JERZ

89 663 5.4K

New Jersey @NJGov · May 15
beaches will OPEN 5/22 for MDW with social distancing guidelines in place:

don't
f*
this up

(_/) ||
(.人.) ||
/ づ

744

New Jersey @NJGov · Jun 10
New Jersey has entered the chat

213 643 7.1K

New Jersey @NJGov · May 22
*****Social distancing guidelines*****

213 2.1K 12.4K

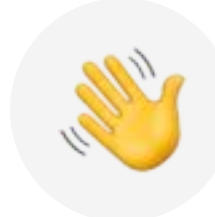
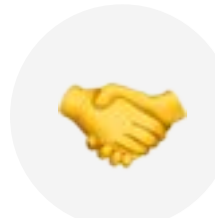
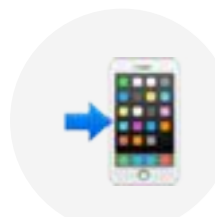

New Jersey @NJGov · May 27

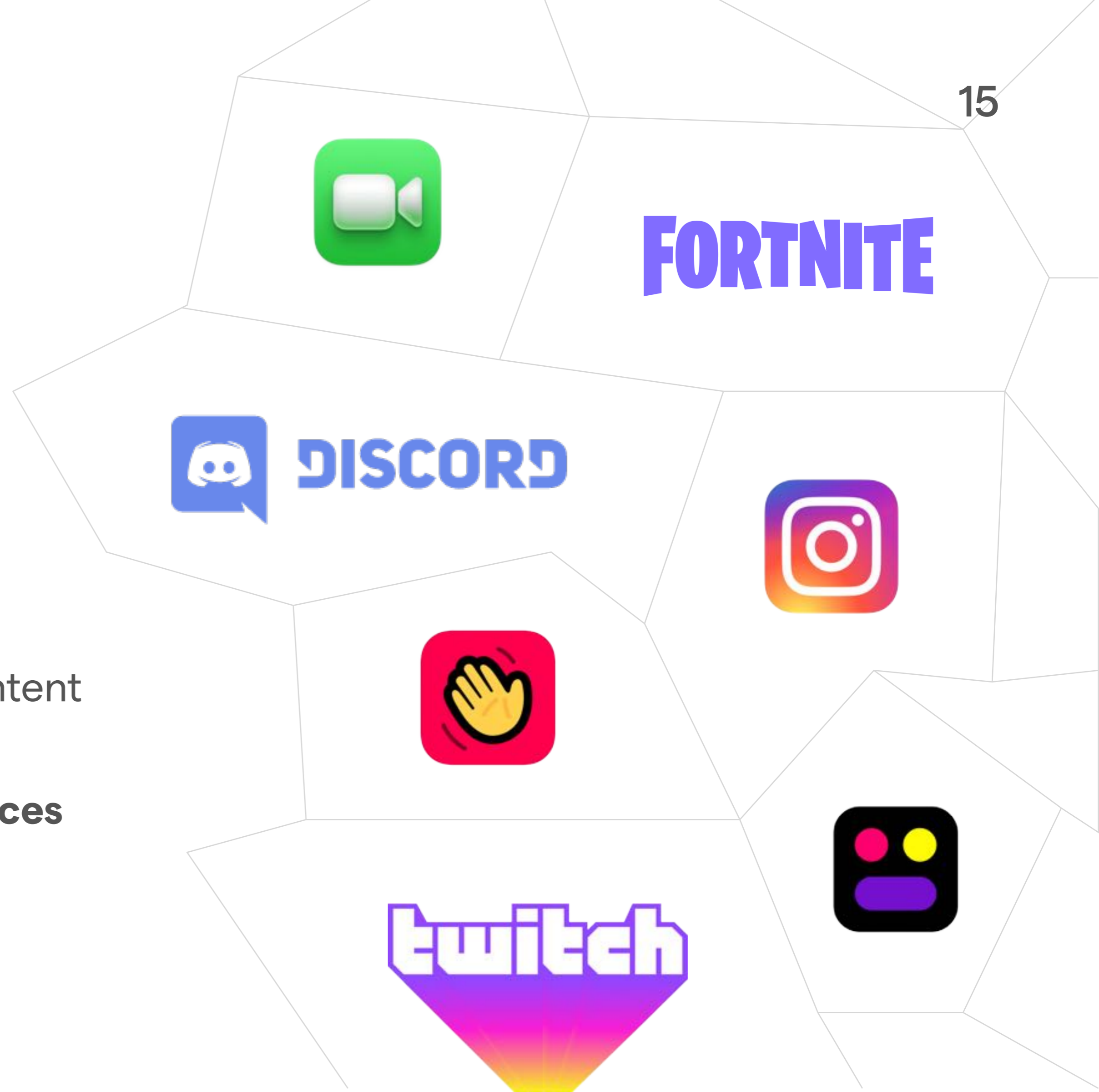
60 312

2 New Spaces

Gen Z's **third places**

Where you can find Gen Z...

-  **Hanging out** with old friends
-  Making **new friends**
-  Sharing **memes** and trending content
-  Taking part in **exclusive experiences**



Fortnite is building immersive experiences

Travis Scott 📍

An in-game concert on **April 23rd** brought in **27.7m** unique views and **45.8m** total views

Last year...

Marshmello



Jordan



Instagram Live + Friends!

Lil Yachty Talent Show

Challenges included **shaving your eyebrows off** for \$200. It saw over **25k live viewers** at one time



Young people will spend significantly more time hanging out in “third places”. The convergence of gaming and social is already present (Discord, Houseparty, Zoom). I think it’s probable that **the next massive social media product will be, whether directly or indirectly, a game**

@jacksondahl

Founding Member, 100 Thieves



Gen Z will continue to control their various online personas through multiple profiles/platforms. They have multiple Instagram accounts, private Snapchat stories, etc. **Gen Z values their privacy and wants to be able to make the call on who sees their content, even on a person-by-person basis**

@thatswattsup

Former Product + Community Lead, MSCHF



Gen Z will continue their pursuit in finding safe havens of the internet — places where they can be authentic, real, and expressive from the soul. We are at the brink of being immersed into the first Ready Player One environment and I'll bet you my life Gen Z will be the first movers in bringing the rest of humanity there

@akashrnigam

Cofounder and CEO, Genies



Gen Z continue to lead the way in **blurring digital and physical identities. Gen Z popularizes and normalizes friendship formation that happens online anchored around shared live experiences**, versus traditionally this would happen offline. Millennials will continue to love Gen Z and take cues from their values they champion

[@ntdillon](#)

VC, Maveron



3 Content Creation

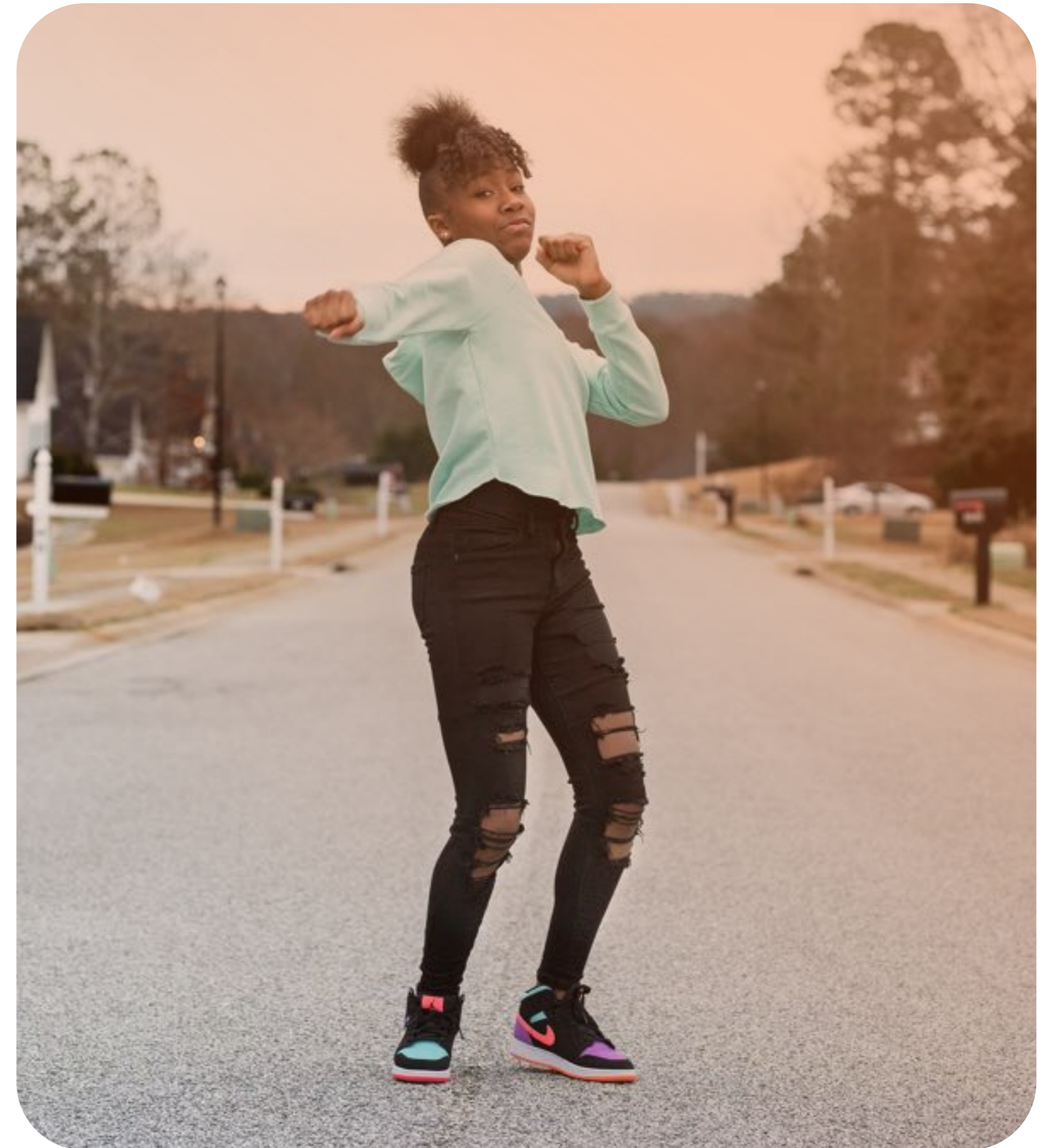
People of color create popular trends

Renegade 🙌

Dance by **Jalaiah Harmon**, to the song **Lottery** by **K Camp**, which would peak at #15 on charts, and get certified **Gold by RIAA**

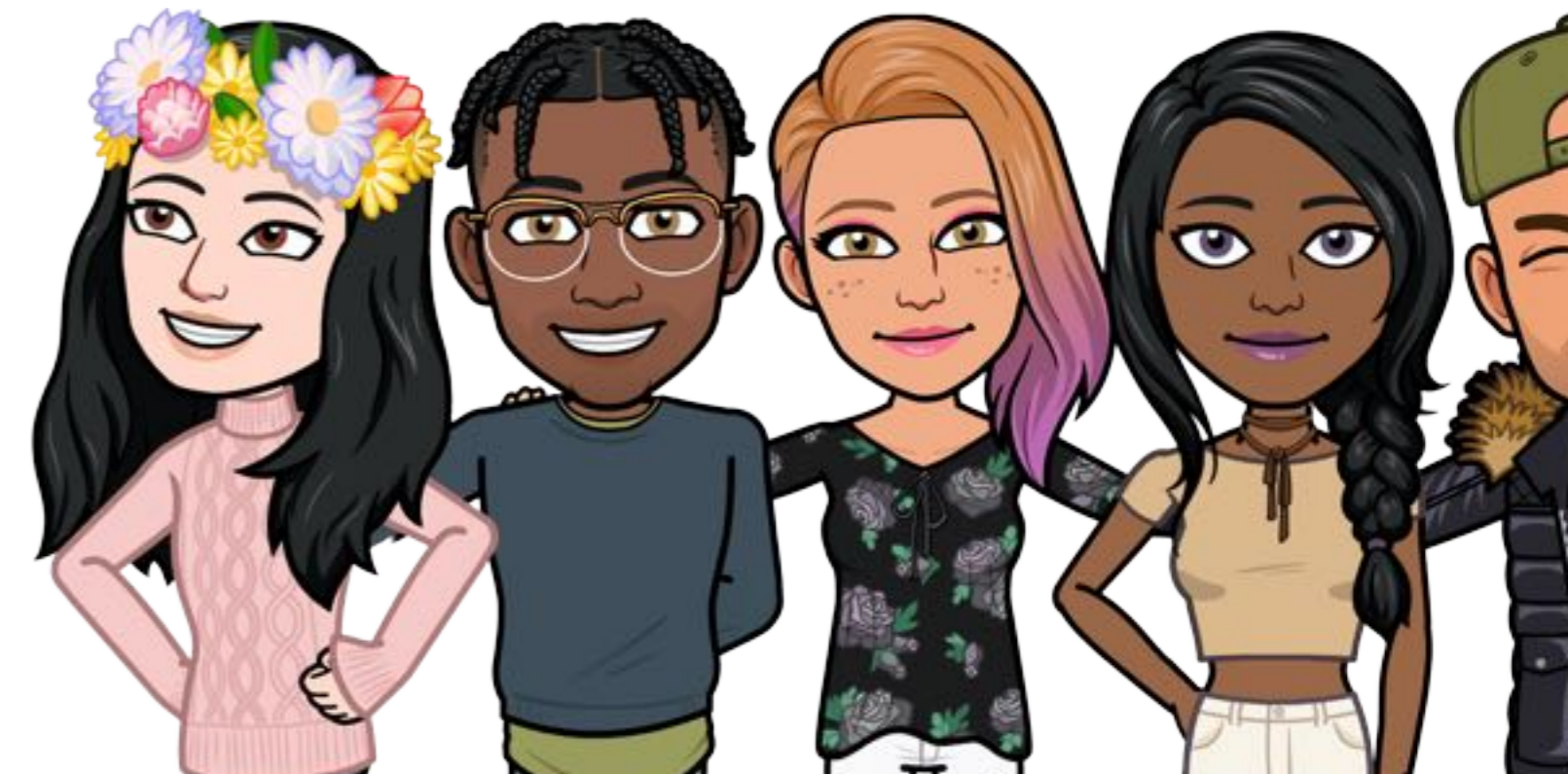
In My Feelings

Dance by comedian **Shiggy**, to **In My Feelings** by **Drake**, which hit #1 on Billboard for 10 weeks

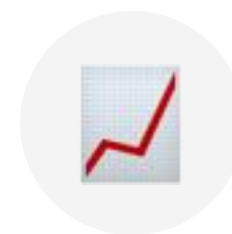


Jalaiah Harmon

Be **proactive** in working with **diverse creators**



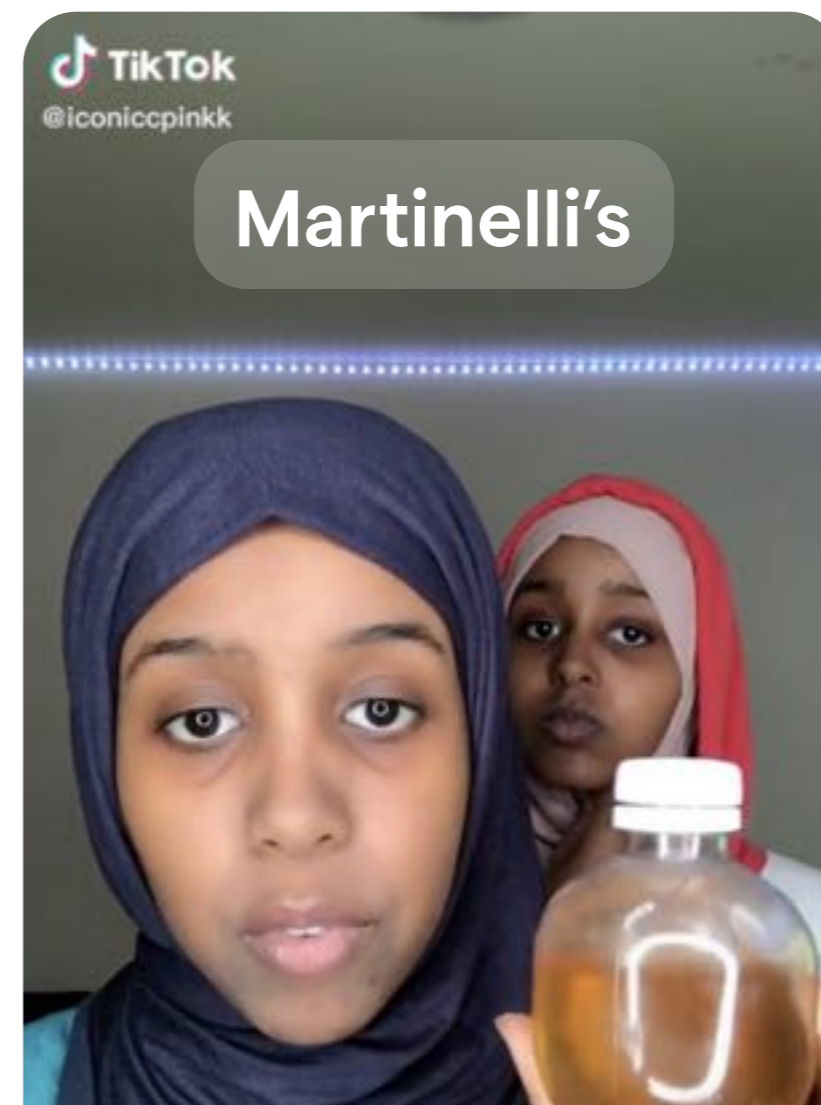
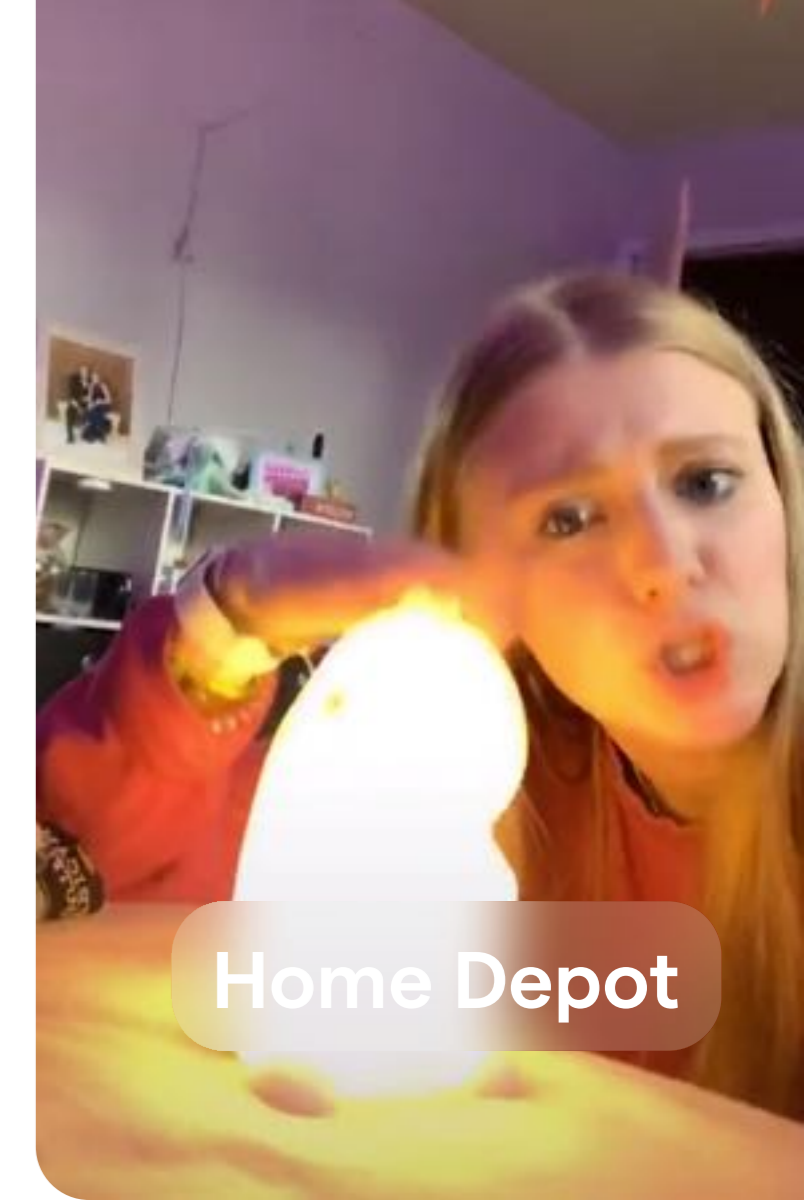
Win social media with user-generated content



Winning brands are creating
viral, product-focused content



Being first to trends **authentically**
can help you **win over Gen Z's** wallet

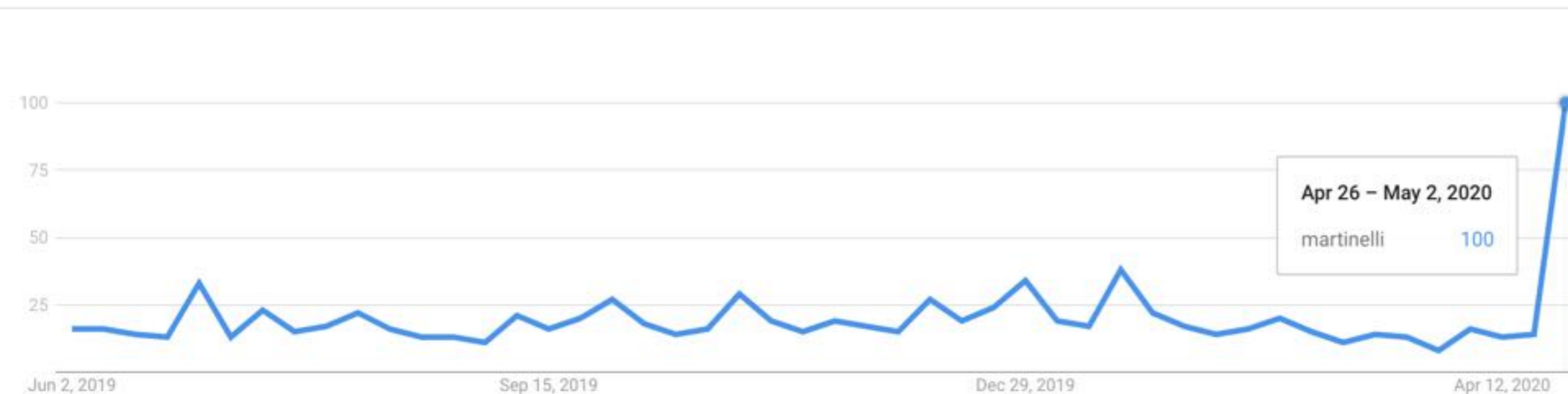


Take **Martinelli's** for example!

Bite into the bottle 🍏

Martinelli **went viral** on TikTok after someone discovered biting into the juice bottle **sounds like biting into a real apple**. It seemed fake, so people went out to try for themselves...

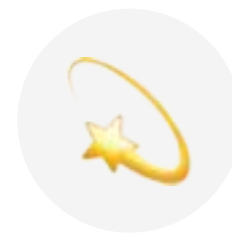
Interest over time ?



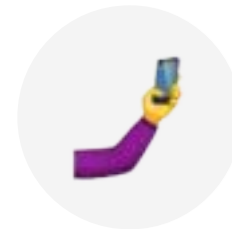
ZEBRA IQ



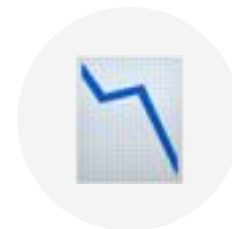
Creation is **intentionally messy**



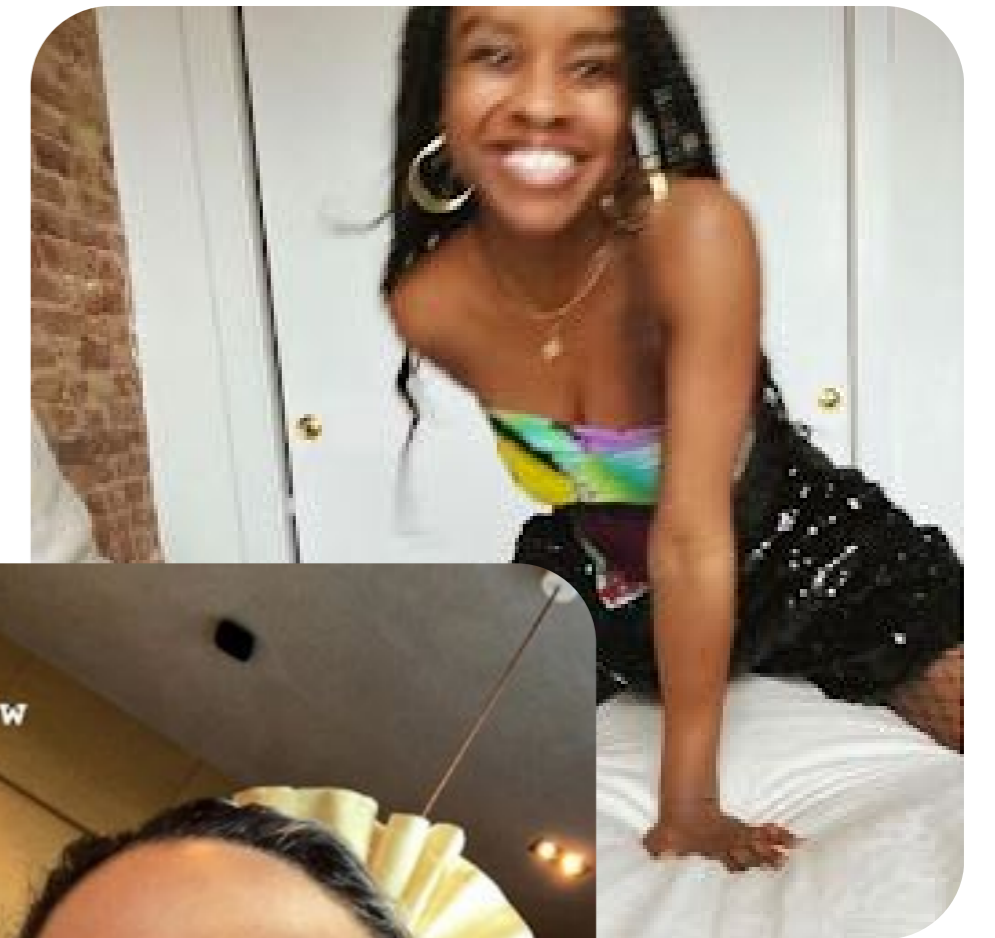
Raw, blurry, moving photos included in social feeds






Unflattering photo angles are more “real”

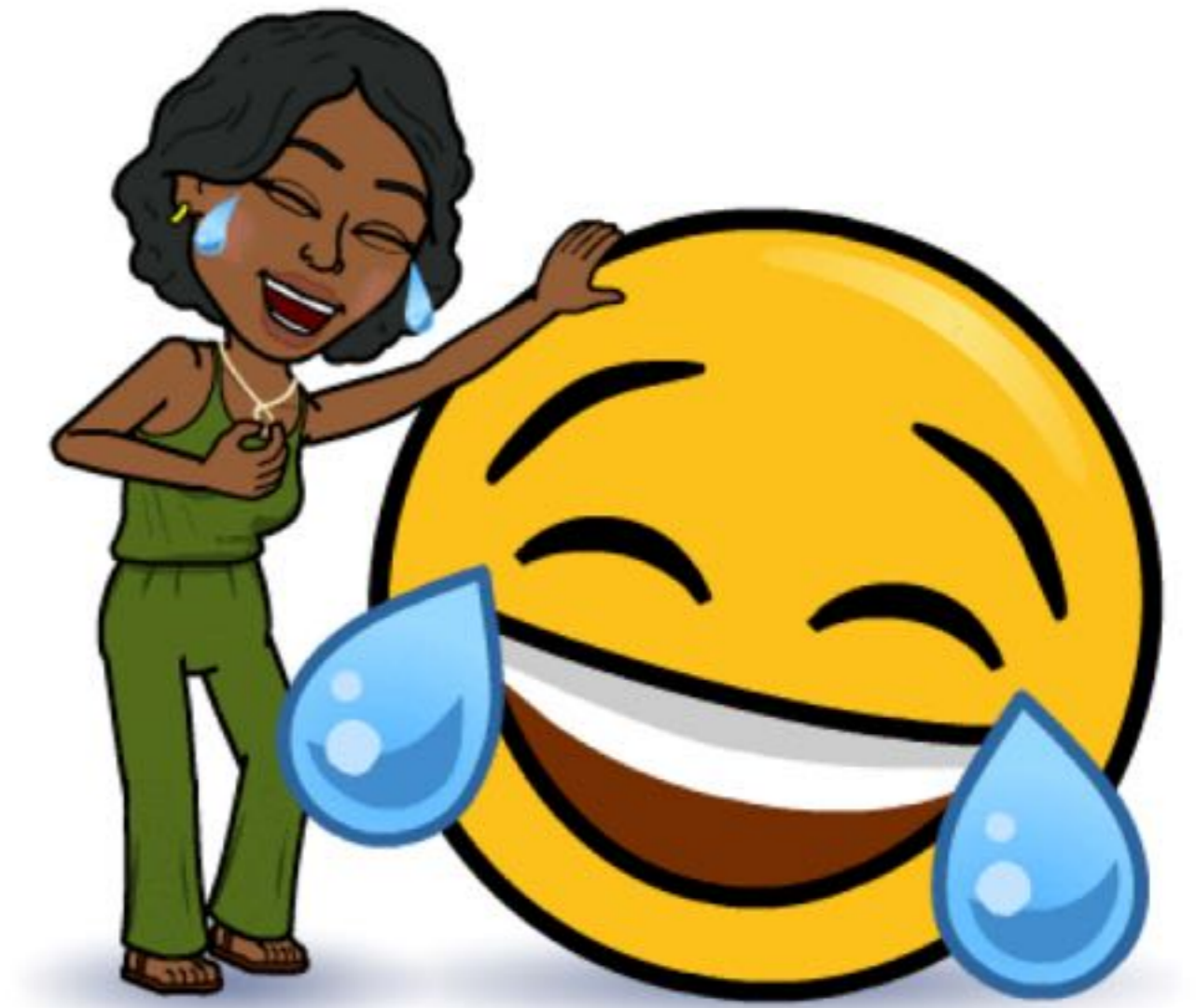


Go out of their way to make photos **look worse**



Takeaways: Meme-ability

-  Design every product, content put out there to be **shareable and meme-able**
-  Capitalize on the **viral moments!**
-  Try out **new platforms**



Gen Z has been driving a shift in the 1/9/90 calculus (1% of your users create content, 9% engage, 90% view).

Thanks to an openness to create, meme & remix features, and platforms investing in ways to narrowcast, we're seeing more creating and engaging with content. **The lines between creator and consumer continue to blur**

@duboff

Head of Creator Product Marketing, Spotify



The attributes of platforms and the content that goes viral is very much in line with Gen Z's beliefs. TikTok is all about positivity, relatable voices, being your authentic self, and creativity. It's also inclusive — Gen Z encourage their parents, coaches, and teachers to try TikTok dances and trends

@overtimezack

Cofounder and President, Overtime



COVID-19 has accelerated many trends — we're going through "experience compression". Since things have moved online, **those in power who previously ignored Gen Z now have no choice to pay attention to a global creator base that can quickly create cultural zeitgeist moments and paradigm shifts in perspectives**

@lhzhong

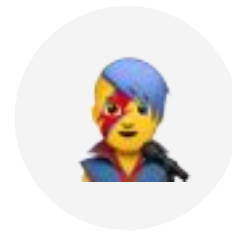
Strategy & Business Lead, Medium



4 Fashion

What's old is **new** again

Thriftling is back via P2P social shopping apps! Popular products include...



1990 – 2000s styled



Artist / influencer **merch**



Environmentally friendly apparel



Exclusive drops and collabs



Today's fashion is extremely expressive

Putting fits together

Blend of skate and streetwear, vintage fashion, logo / iconic pieces in ways that just seem to work

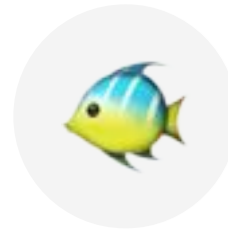
What's hot in current fashion is very deeply rooted in Black culture — bucket hats, logomania, sneaker culture, etc.



Style subgroups and -cores



Often nostalgic of times **before** them, emulated using **Huji**



Want to **belong** to a subculture

Some examples...

Vaporwave

Dark Academia

Egirl/boy



5 TikTok

TikTok stars are real celebrities

Charli D'Amelio 📍

A 16-year old started posting videos **last summer**. She is now the most followed account on TikTok, with over **86 million fans**

Wisdom Kaye

19-year old who started a TikTok account to show off his range of male fashion. Built brand of **~4M fans**, then signed to **IMG Models**



Charli at the **NBA All-Star Game** this year



Charli, in a **Superbowl ad** for Sabra hummus

TikTok drives viral sounds & songs

Here's what happens...

Tiny Meat Gang

177k videos created using "Walk Man" → racks up 35m streams on Spotify → duo goes on tour

Arizona Zervas

2.5m videos created using "Roxanne" → 780m streams on Spotify → signed to Columbia Records

24kGoldn

872k videos created using "Valentino" → 177m streams on Spotify → signed to Columbia Records



TikTok **cements hits** as quickly as it makes new ones

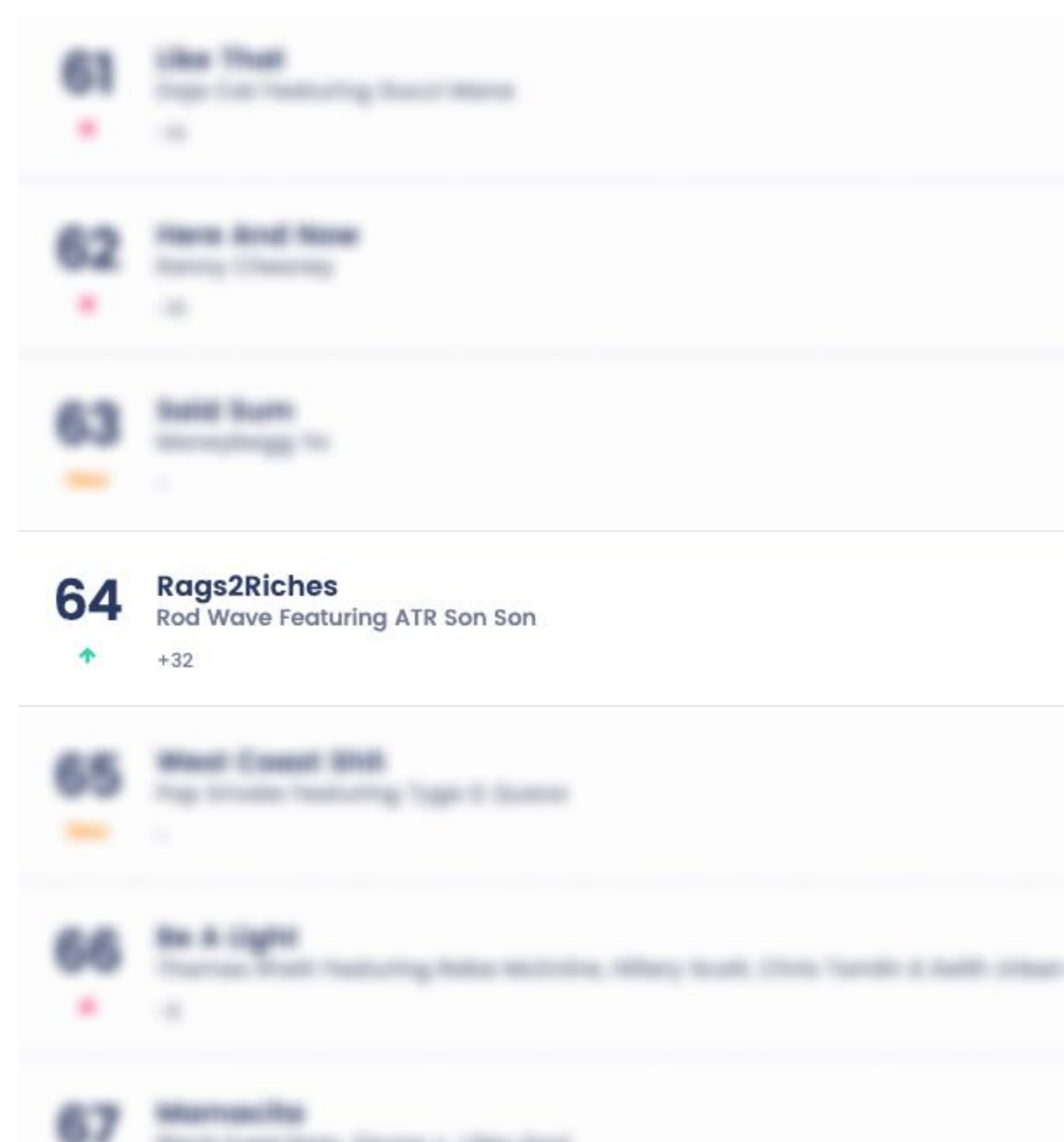
Say So Doja Cat, Nicki Minaj

20.5M videos on TikTok, 27 weeks on *Billboard*

Rags2Riches Rod Wave, ATR Son Son 🙌

Released April, picked up by Charli, **+32 spots on *Billboard* in second week**

Today's powerful influencers wouldn't achieve any fame without Black culture. TikTok dances repeatedly come from the work of Cardi B, DaBaby, Roddy Ricch, etc.



TikTok has **collab houses**

Creators are moving in together to make exclusive content

Hype House

Drip Crib

Sway House

Clubhouse

Shluv House

Vibe House

Click House

and more...



Hype House



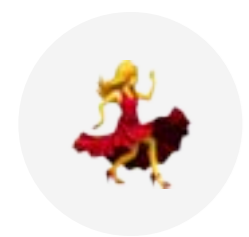
Sway House



Shluv House

Some brands are great at TikTok

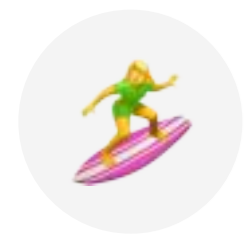
Not many get it right! Some good examples...



Create UGC challenges – *#EmoteRoyaleContest* to put an emote in Fortnite



Partner directly – NFL and TikTok 2-year deal



Create trends – Elf Cosmetics' TikTok-specific sound generated 1.8M videos

ZEBRA IQ



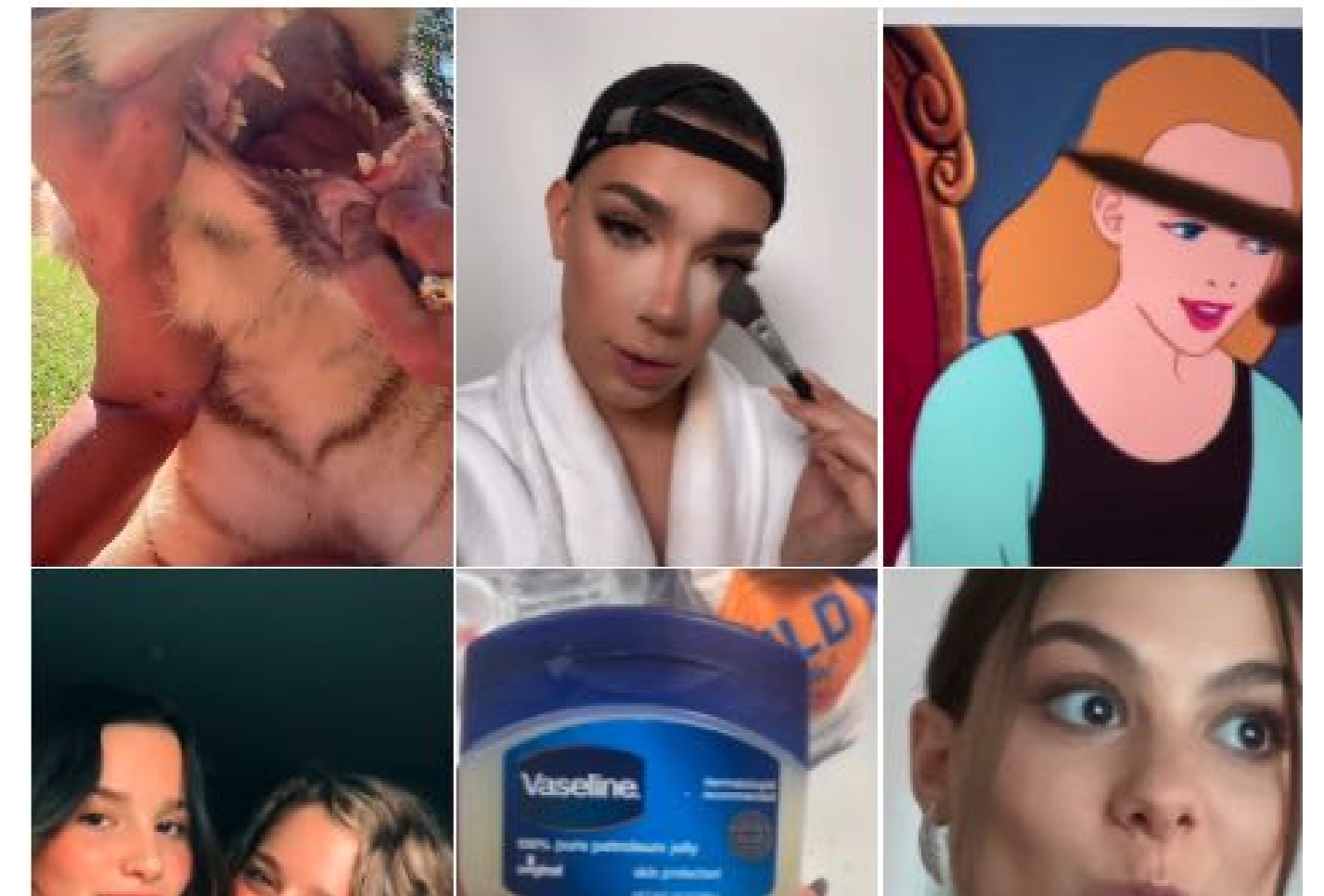
#eyeslipsface

6.3B views

"Do that thing with your eyes 🙄 Let me see them lips 🗨️ Attitude and gimme face! 😏

We got the beat, you've got the moves. 🕺 Now eyes, lips, face, dance your way to \$250 worth of e.l.f. Cosmetics makeup + skincare products! Work your (s)e.l.f. confident moves for a chance to win!

NO PURCHASE NECESSARY. Begins 10/3 at 10:00 pm PST and ends 11/15 at 11:59 pm PST. Open to U.S. residents 13+ years old (with parental/legal guardian permission where applicable). Each entry must include the hashtags #eyeslipsface and #Contest. Limit 1 entry per day per person. Odds of winning depend on the number of eligible entries received. Void where prohibited. See Official Rules at <https://www.elfcosmetics.com/promotion-details/sweepstakes-contest-rules>



Example: David Dobrik teams up with **Chipotle**

Go to **#ChipotleSponsorMe** to watch entries to win **1 of 5 Celeb Cards** for unlimited **free Chipotle**



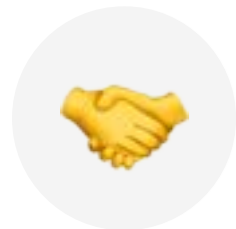
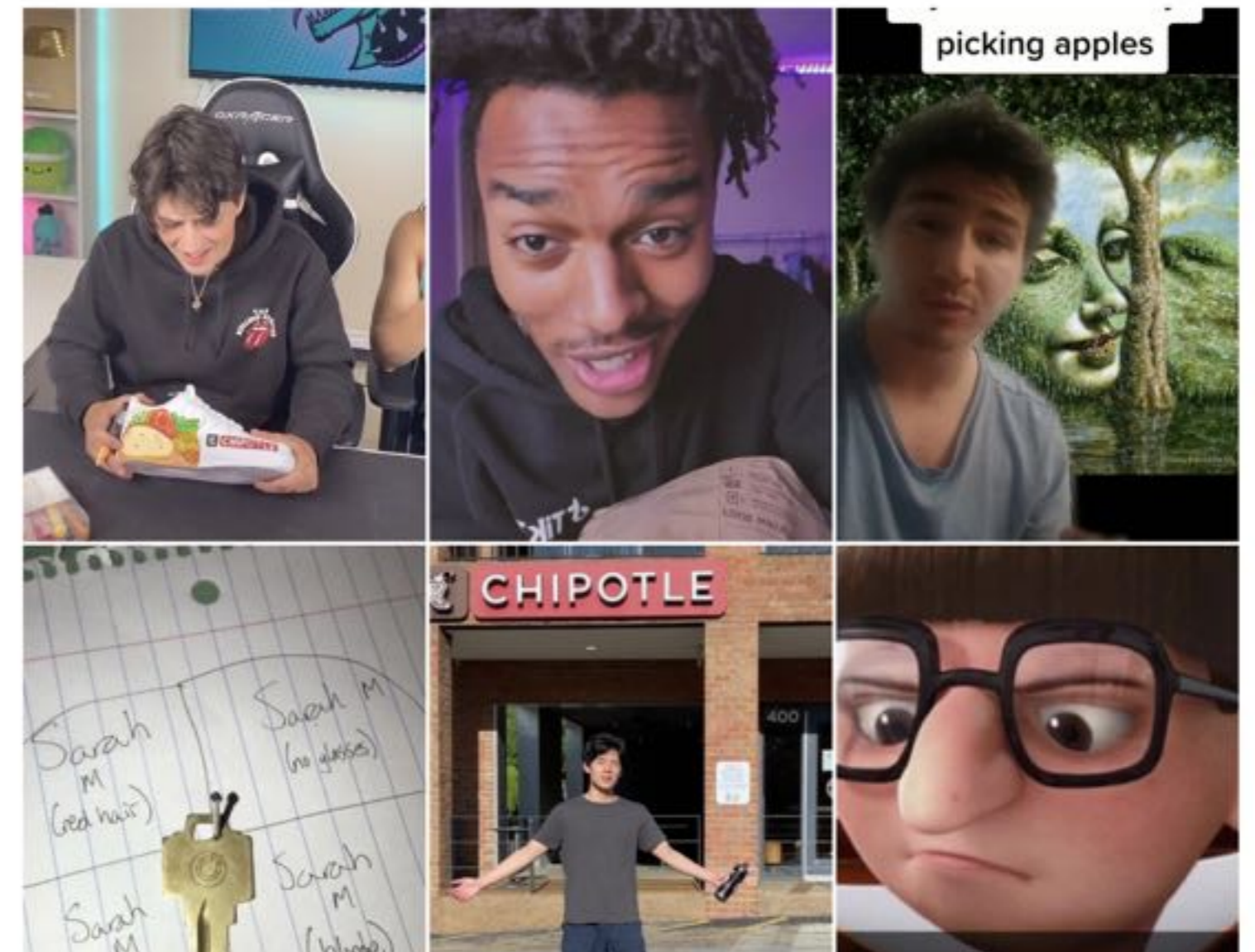
#ChipotleSponsorMe

2.1B views

...

What do free delivery, free queso, and a Chipotle sponsorship have in common? You could get them all on Cinco de Mayo. We're teaming up with David Dobrik to give away 5 Chipotle Celeb Cards. To enter, follow @Chipotle, post your most creative Chipotle TikTok video, and use the hashtags #ChipotleSponsorMe and #contest. Then get free queso + free delivery online and in-app on Tuesday, 5/5. Use code QUESO55 at checkout.

Free deliv 4/30-5/10/20 \$10min/\$200max excl tax; free queso 5/5 only w/entrée purch, use code QUESO55. See add'l terms below.



Long-term partnership with creator

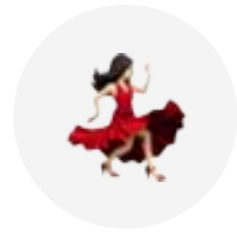


2 billion views on the challenge to date

Takeaways: TikTok



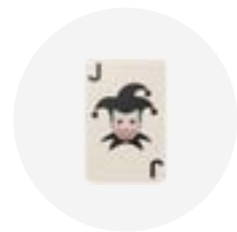
Make a brand account and **start experimenting!**



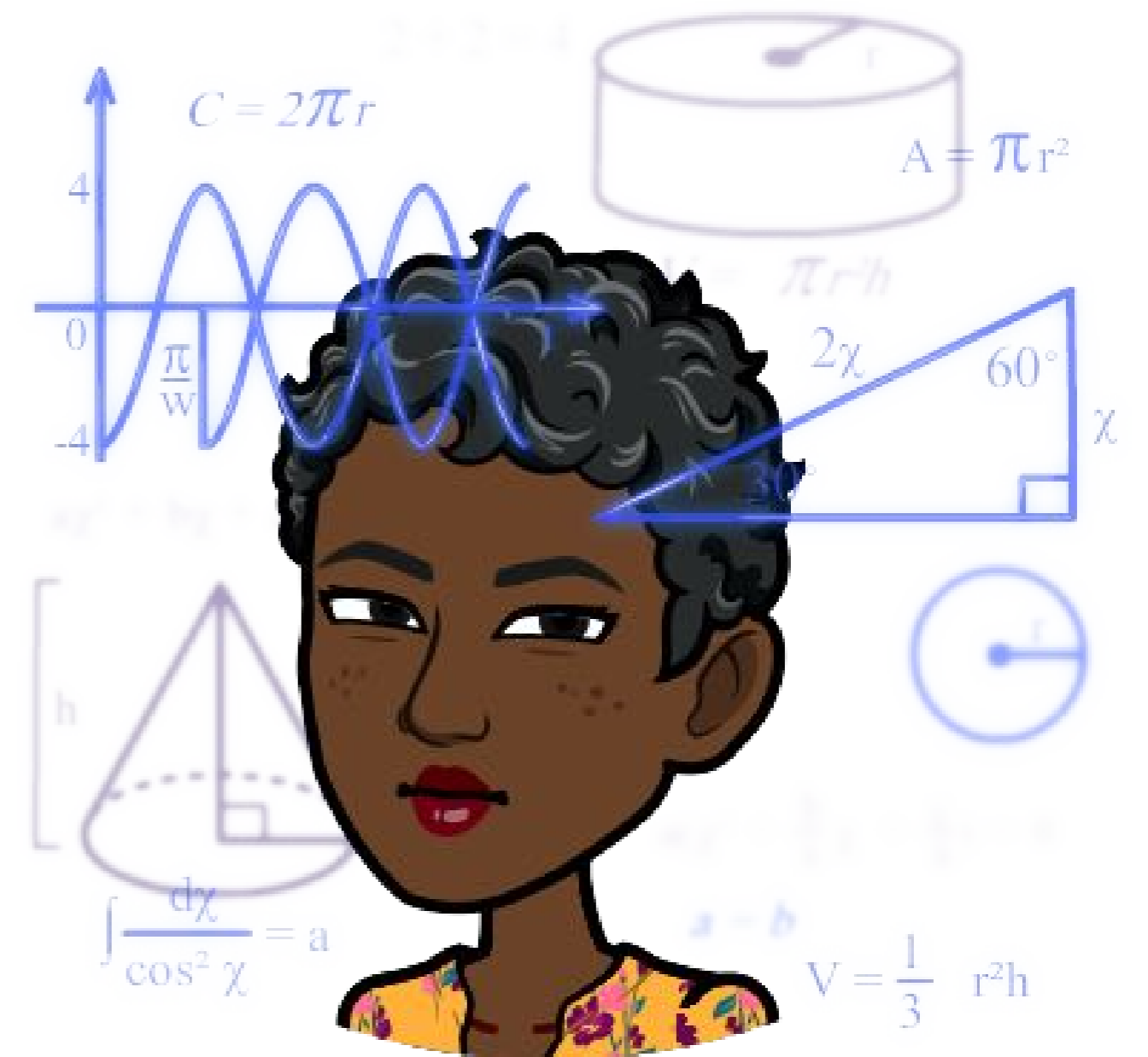
Start challenges, make your own sound



Leverage opportunities for **UGC**



Bet on **up and coming influencers**

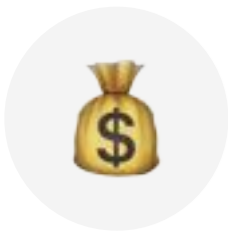


6 Influencers

Influencers want merchandise



Emma Chamberlain started a coffee company!



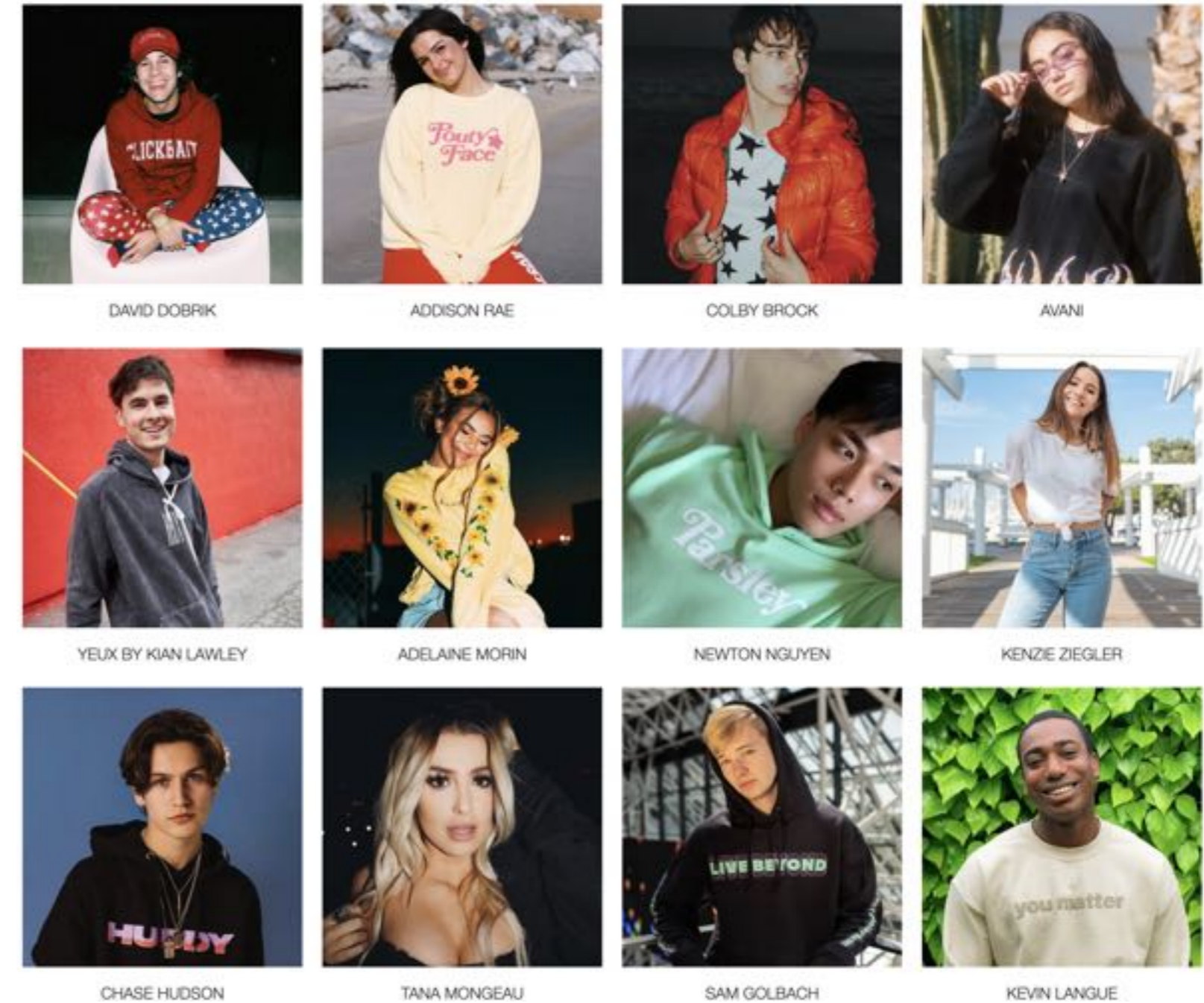
Core revenue stream for creators



Creators are launching companies

What should you do?

Collaborate with a major creator on a **product line** where they get the majority of creative control



Virtual influencers are making very real waves

Lil Miquela 🙌

Digital artist-influencer who remixed a *Lauv* song → **2.5M on Instagram**

Fnmeka

AI-powered Soundcloud rapper → **2.9M on TikTok**

Companies making moves...

Genies



Nintendo



Influencers and **accountability**

Brands have to research who NOT to bet on;
Gen Z does not blindly follow influencers

Shane Dawson 🙌

YouTuber since 2008, dropped by major brands
for history of **blackface, pedophilia, racism**





Jeffree Star

Dropped by *Morphe* for **predatorial, manipulative
behavior** with intent to ruin YouTuber's career

Value awareness is much more important
in a brand than being versed in pop culture



Cultivate **creation!**

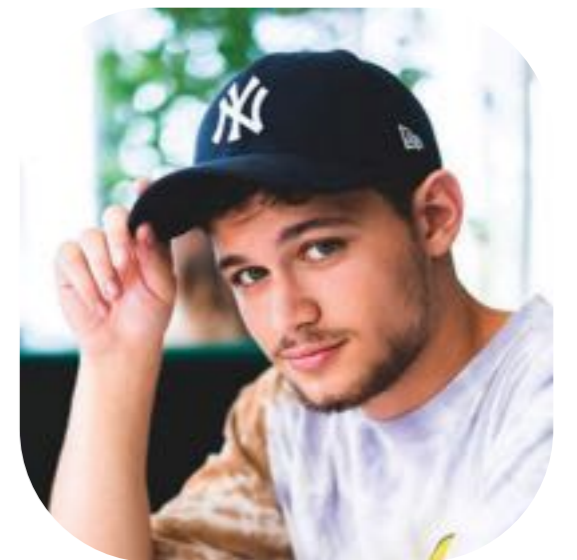
-  Launch **unconventional partnerships**
-  Make **remixes and UGC opportunities easy**
-  Take (researched) **big bets** on rising creators
-  **Trust creators** with the creative process, don't rely on strict instructions



Gen Z now looks at influencers as the people they get their news, information, motivation, and entertainment from. People are following more people on all platforms as that's where their information comes from — that will only expand too. I think LinkedIn will get a lot younger in the next 12 – 24 months

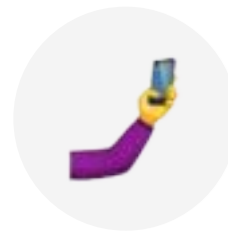
@busterscher

Founder, Hoops Nation

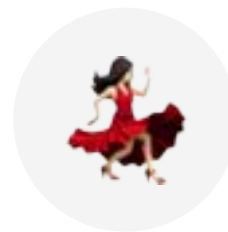


7 COVID-19

Social shifts in shelter



Gen Z are using **FaceTime (65%)** and quick **Zooms (9%)** to keep in touch



Screen time is *up* — **21%** feel they spend too much time on **TikTok**, **19%** on **Facebook**, **16%** on **Instagram**, **10%** on **YouTube**

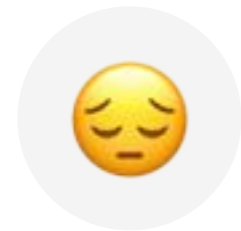


On remote learning

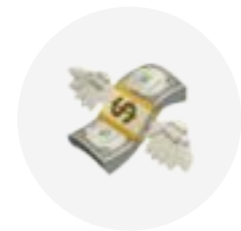
Gen Z is the first generation to *really* stress test remote learning, though not by choice. Some quotes...



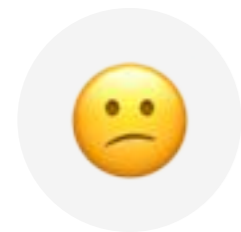
I hate it but **my grades increased tremendously**



Not good. Feel like it's very, very hard on students



Complete **waste of money**



Some **teachers aren't suited** for online learning



Other **statistics**



50% feel like they're **spending more on food**



35% feel like their **mental health** has worsened



29% feel like **maintaining relationships** has been the hardest part of isolation



Despite current situations, **71%** are **optimistic** about next few months



COVID-19 has accelerated Gen Z to **adopt the Internet as a place for genuine community and activism instead of just entertainment, breeding perhaps even stronger comfort and closeness.** Animal Crossing became the new meeting place, graduation stage, etc. You might see more of that than you think in a post-COVID world

@omgchomp

Director of Social & Audience Development, Crypt TV



Education is being democratized and universities are no longer the gatekeepers. **I think we'll see more and more Gen Z opt for online education and ditch student loans.** It will also be difficult to unravel remote work as it'll be all Gen Z know in their professional career. Employers thus must offer flexibility for it in a post-COVID world

@9th

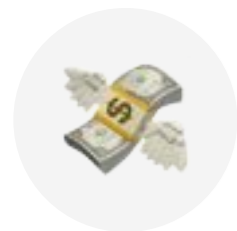
Cofounder, Unfold



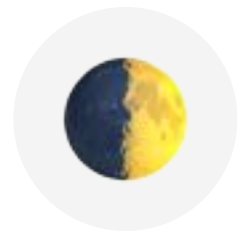
8 Money & Work

“I want it → I got it”

Gen Z is the **side-hustle** generation



Will **find a way to make money** to buy the limited edition streetwear, skincare products they really want



52% of people on Zebra said they earn via side-hustles



The generation that **grew up online**

Gen Z is making money...

Freelancing

Graphic Design, Fiverr, Virtual Assistants

Strategic Investments

Building meme pages, flipping streetwear

Creating Content

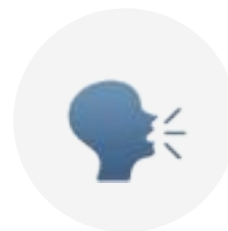
on Twitch, TikTok, YouTube, Instagram



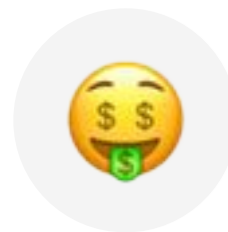
Gen Z shops selectively



Roll out **price-relevant products**



Build avenues to **be rewarded** through **referral programs**



Open up channels for Gen Z to **create secondary markets** to use in free time

Sneaker reselling or “flipping” is very popular within Gen Z!



Very value-driven

Gen Z is very perceptive of the brands they buy from and the places they want to work at

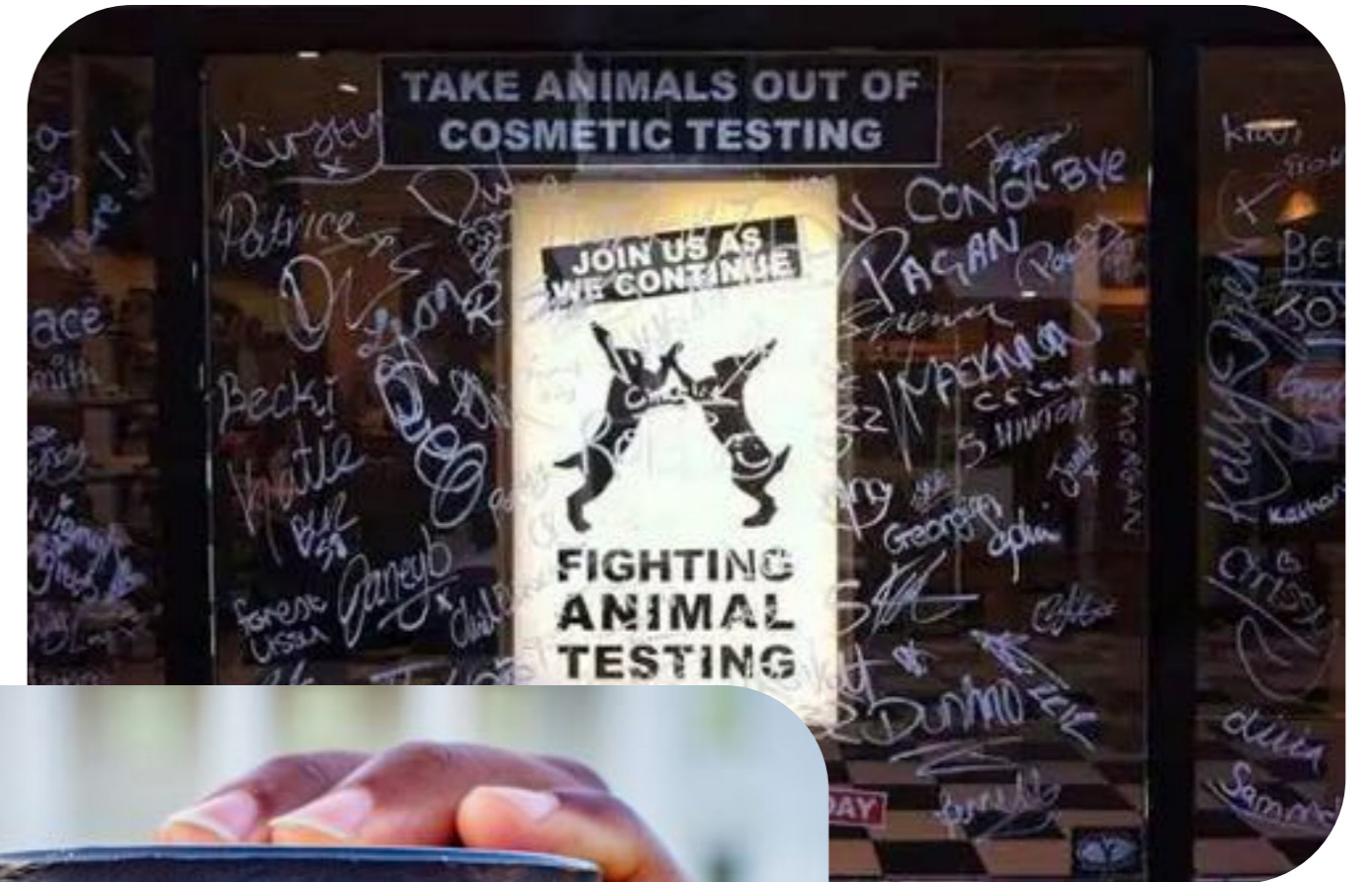
Some strong values

Human rights

Environmental aid

Political reform

Education for all



Hire Gen Z Social Media Experts

How do you select them?

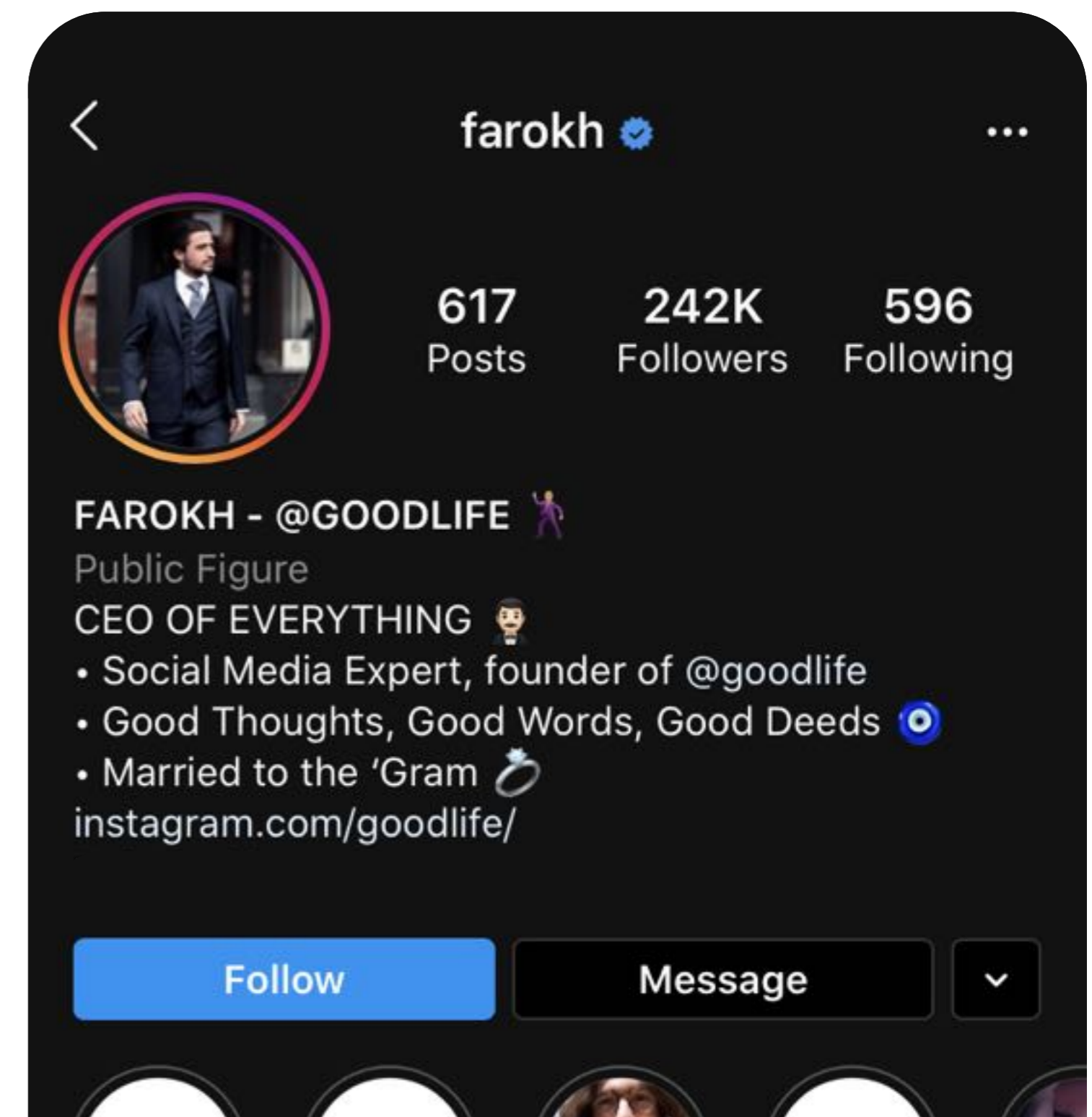
Use success with viral memes and pages as a selection factor — this answers if they can make something trend!



Gen Z expects **autonomy, flexibility, and trust**

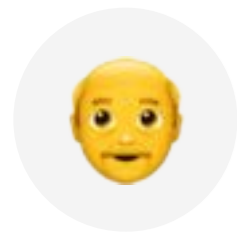


Social Media and **Community** are more important than ever



9 Activism

Vocality is the norm



“OK Boomer” as retaliation to common critiques



Low threshold for **racism, sexism, genderism, harassment**



ceo of gen z
@ceogenz

gen z will overcome years of anxiety to scream at the police without hesitation but also cry themselves to sleep every other night because their crush left them on read



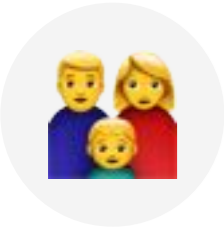
Teya
@tey_an

Gen Z will drink one medium caramel latte, not eat a single thing till 4 pm, verbally abuse a racist, crack a joke about their mental health and pick up a tear gas canister with their bare hands, but get nervous when they have to call to make a doctors appointment.

Gen Z tries to stay **politically aware**



24% of Gen Z is **very political**, **50%** is **in between**, **26%** is **not political** at all



27% of Gen Z's family and friends are **very political**, **50%** are **in between**, **23%** are **not political** at all



62% of Gen Z's political news comes from **social media**

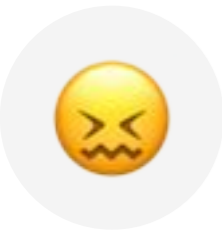


The next 4 years

72% of Gen Z are planning on voting in this upcoming election. Of those who said no...



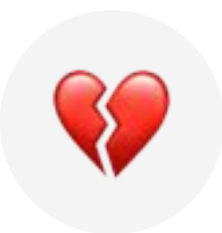
I don't involve myself with politics. The higher ups choose who they want in office...



I feel that both candidates have **values and opinions I don't feel comfortable** with...



The government has **not been for us.** They do what they want...



I've seen **too many families break apart** because of politics to participate...



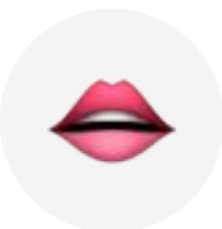
Trend of voter apathy is getting *much* younger!



On **celebrities** running for office



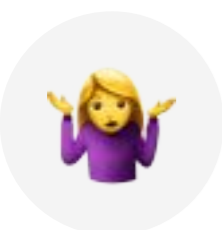
I still like Kanye, but America would be a **clown nation** to elect him President



Honestly [Kanye] might be **better than Trump**







Celebrities should just **keep the careers they have** and not mess with politics



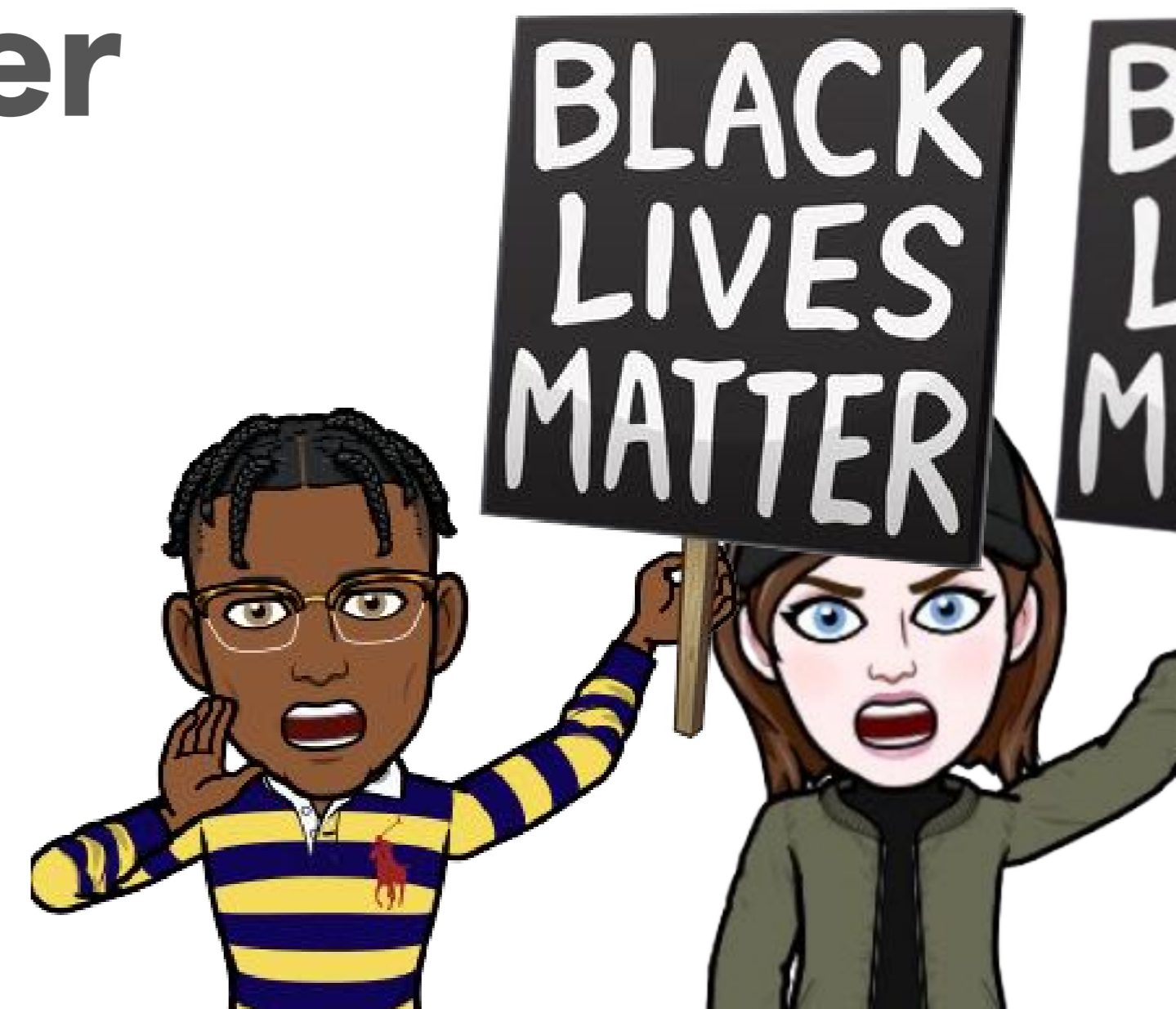
If they have a real desire to lead this country, **then why not?** We live in a democratic society



Black Lives Matter

-  **TikTok trends** to support Black creators
-  Dedicated pages **calling out racists**
-  **17-year old** built the **most widely-spread page** for Black Lives Matter resources
-  **BTS fans raised \$1M in 24 hours** and **shut down police tip app** with fancams

90% of Gen Z support Black Lives Matter



Gen Z is pushing for **change nationwide**

Among many others...

The West Orange Youth Caucus

A young group of activists in the NJ area who arranged **3,000-people peaceful protests** through Instagram

Nupol Kiazolu

Became **President of Black Lives Matter of Greater New York** when she was 18

Winter BreeAnne

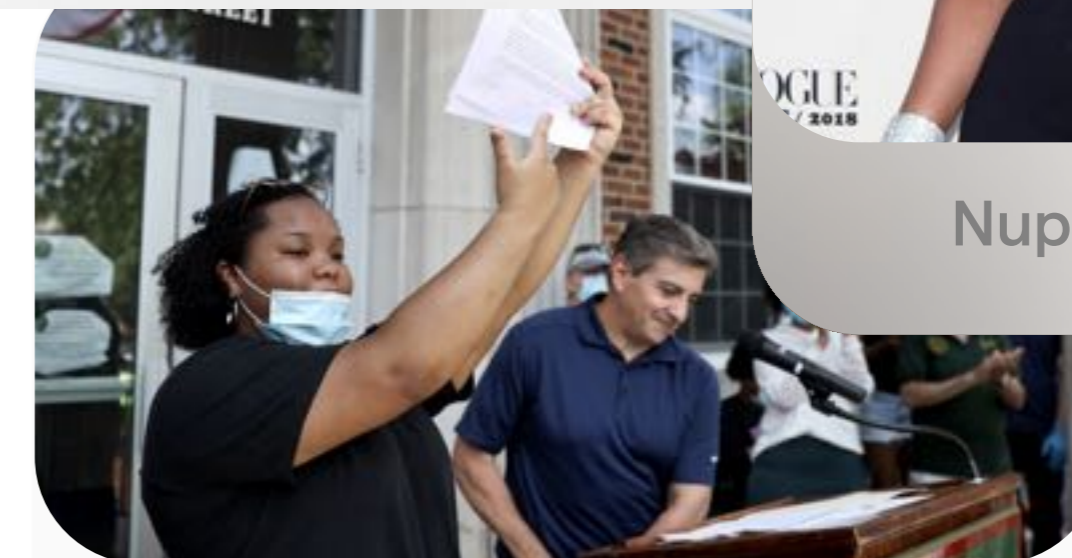
Founder of @blkislit, organizer of the **largest student walkout** to protest gun violence



Winter BreeAnne



Nupol Kiazolu

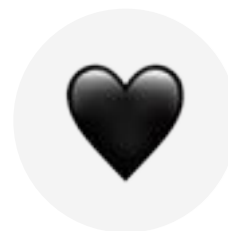


Jordan Scott-Young

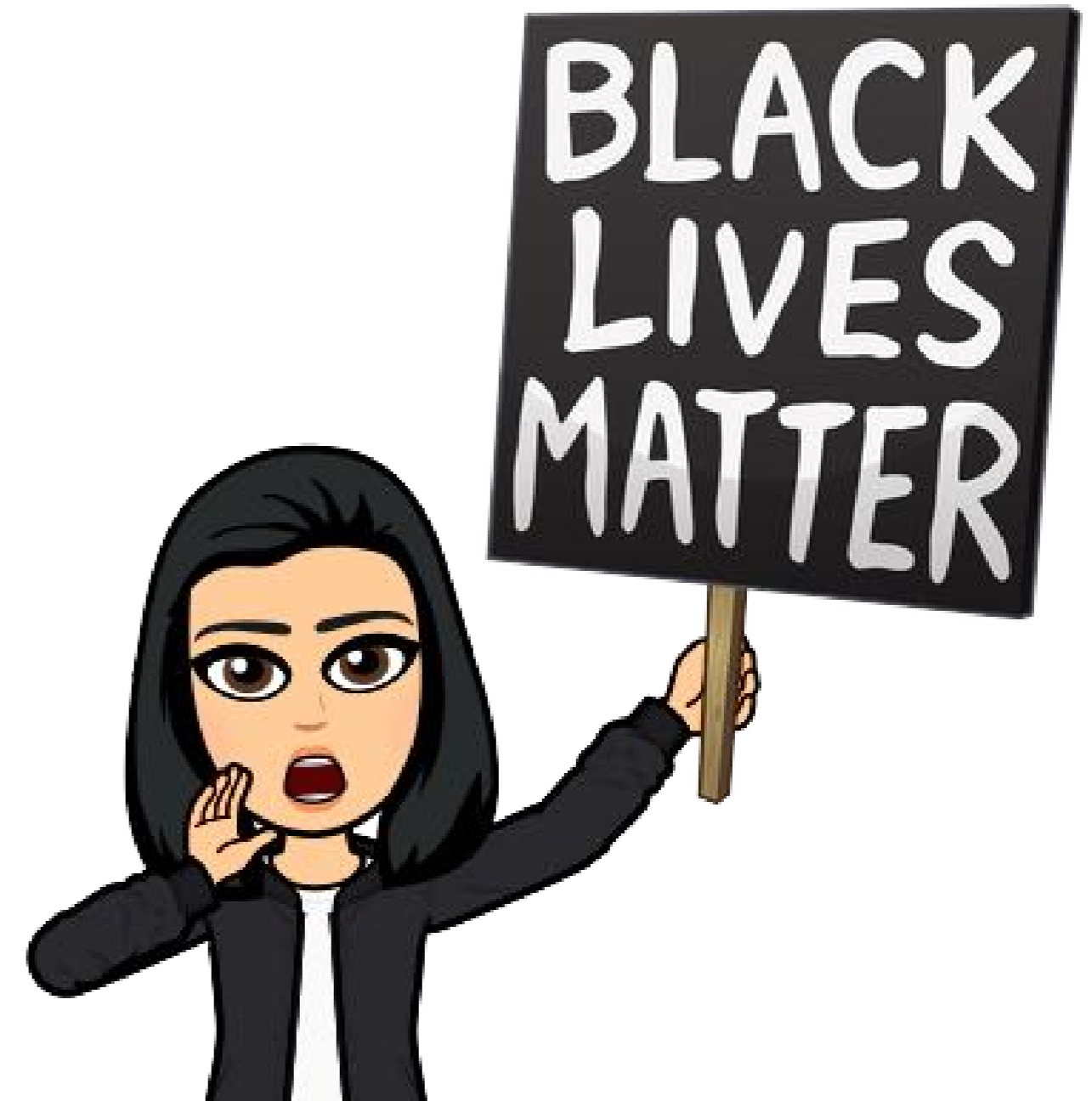
Actions speak louder than performative gestures



Stand for reform of systemic biases



Internally foster cultures for **social contribution**



The Black Lives Matter movement's huge traction proved how **cultural, language, and geographic borders don't matter to Gen Z** when it comes to rallying around their passion for justice. Gen Z could be using social apps as entertainment only but more often **use the platforms as a place for activism and sharing larger messages**

@omgchomp

Director of Social & Audience Development, Crypt TV



I know that Gen Z will continue to stay true to themselves and be vocal about their feelings. Between the pandemic, social injustice, upcoming election, I believe Gen Z will be **more outspoken than ever and will push everyone in their lives - friends, family, influencers, brands - to do the same**

@overtimezack

Cofounder and President, Overtime



Gen Z is now **an undeniable force in leading the charge on social justice awareness and action.** The creators in this generation are using their platforms for good and I expect their influence to continue to grow as they lead the way tackling hard issues head on

[@dlach5](#)

Cofounder, Brat



Typically as a youth, you're on auto pilot. As the previous generation experienced "mindless eating" with fast food, **Gen Z has been closing in on a similar moment with "mindless scrolling"**. Over the last year, though, **Gen Z has accrued unprecedented self-awareness**, resulting in social media detoxes on a frequent basis

@akashrnigam

Cofounder and CEO, Genies



Gen Z is over the drama. They're looking for ways to bring peace, solidarity and positivity back to the forefront. They **care about the well-being of each other** and the planet and continue to find creative ways to **harness their power to impose change on the world** at large. Lots of their behavior are being adopted by older generations

Lauryl Schraedly

Global Head of Consumer Insights, Snap



Gen Z will not sit back and observe. They will continue to take an active stance on issues that matter to them. **They are creating an entirely new playbook for how to leverage technology for this activism and expression.** Brands, executives, and politicians will want to take note and to listen and learn from Gen Z

@joeldflory

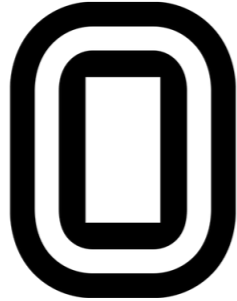




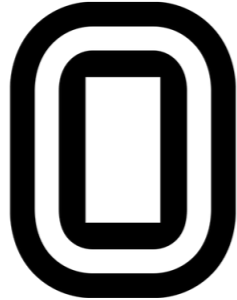






Founder and CEO, VSCO





10 Sports

Select **key players** in Gen Z sports

	Overtime	Mars Reel	Baller Visions	Bleacher Report	Barstool
Coverage & Social Presence					
Merch					
Influencers					
	Flight Reacts	Tristan Jass	CashNasty	Dude Perfect	

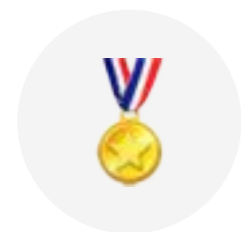
Everything down to **bite-size content**

Off Season

Highlights, clips, and montages

On Season

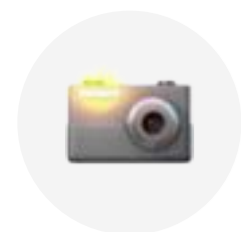
Twitch, YouTube, and Instagram



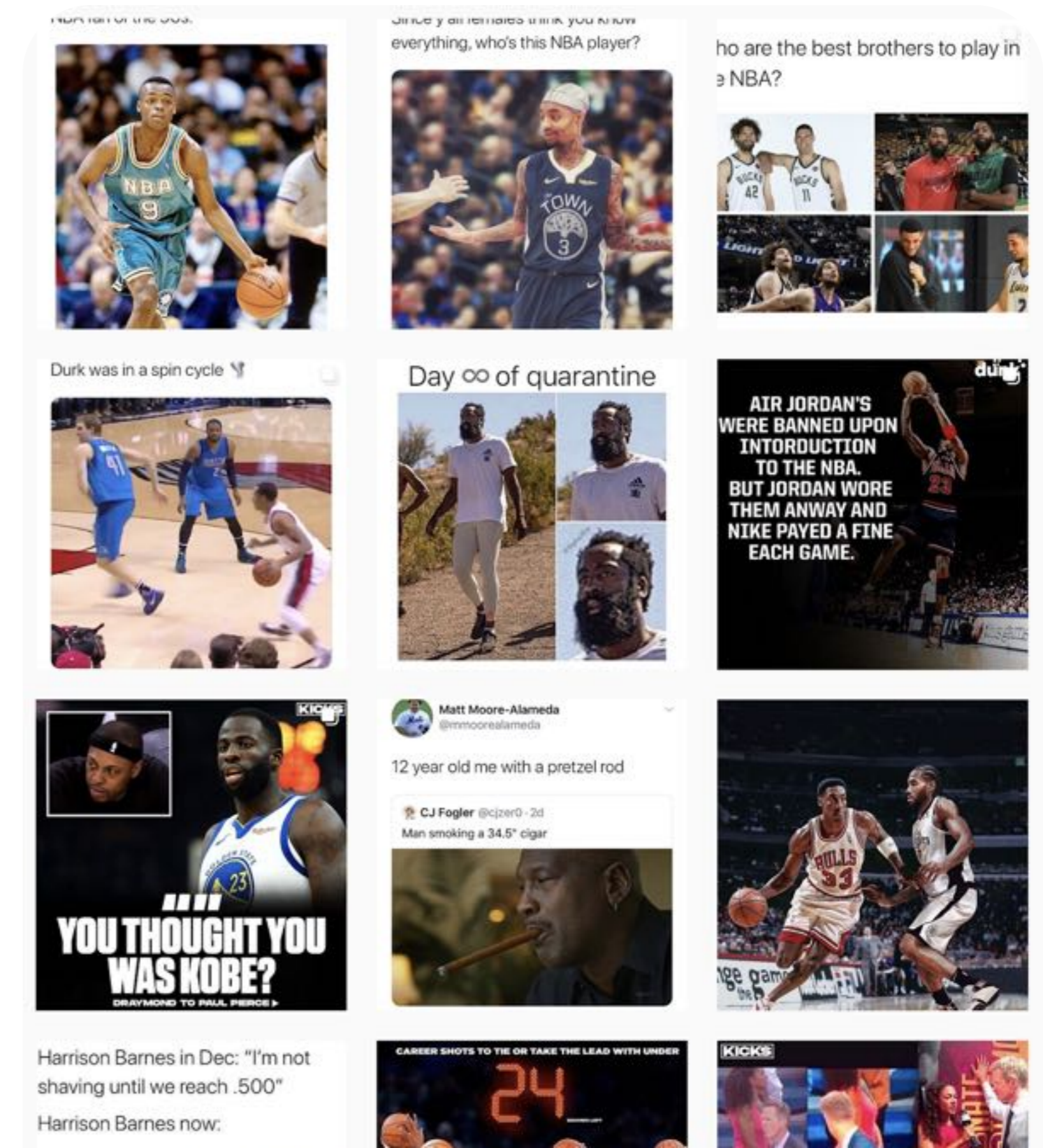
Follow notable **high school players**



Capitalize on **viral material** ASAP — think in memes and clips!

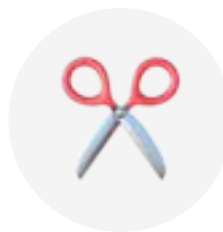


Raw content > Pro production quality

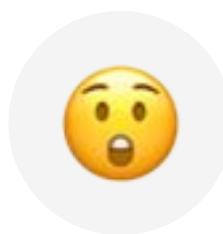


The new sports media playbook

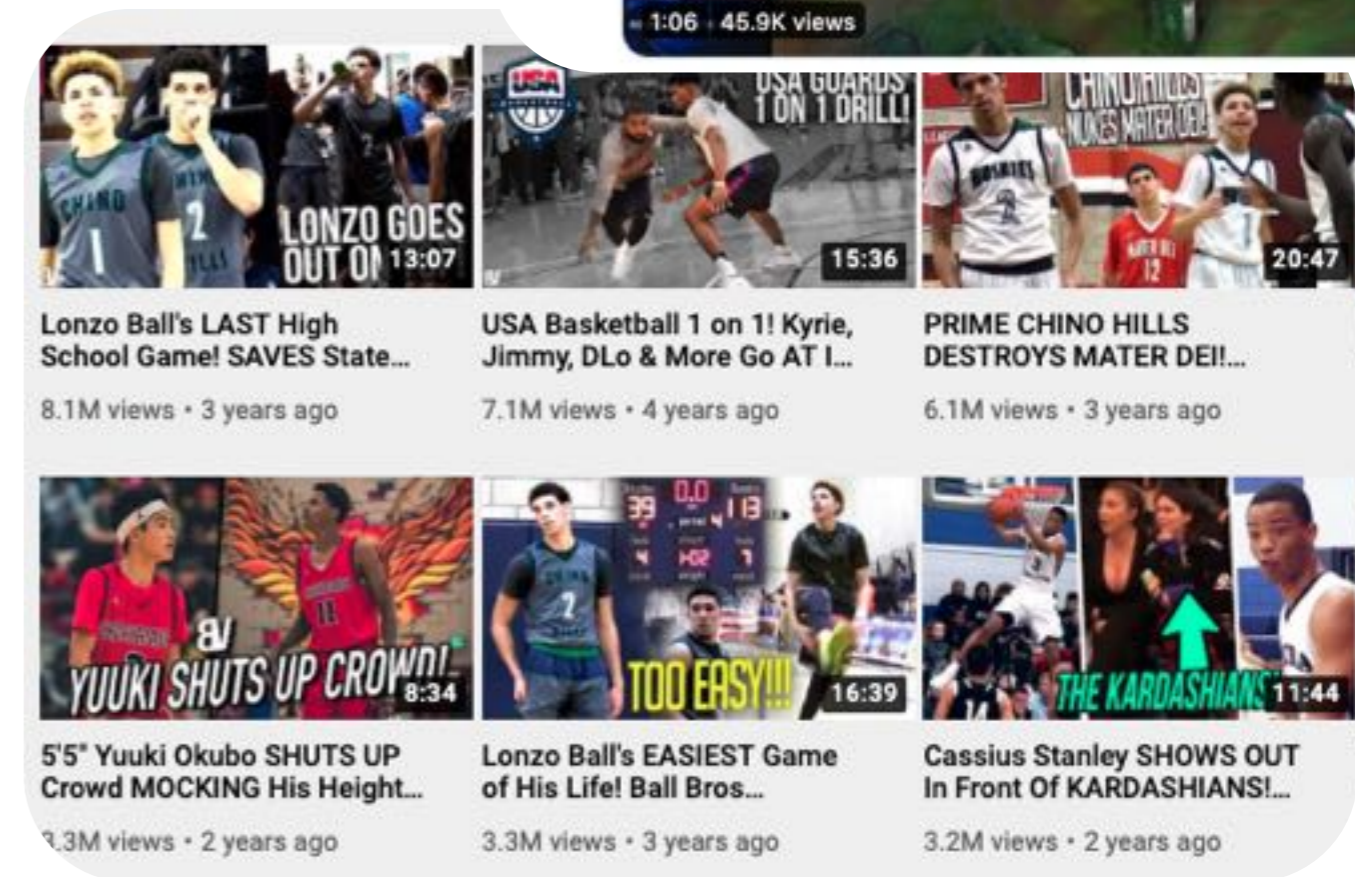
Conceptually shared between *all* successful sports media companies today (whether in eSports, traditional sports, etc) is...



Short, **hype highlights** that can be shared easily



Exclusive tournaments, merchandise, content



Exclusive Content: Untraditional Competitions

Tiger + Peyton v. Mickelson + Brady

The Match II brought golf and football veterans on the green. It raised **\$20M** for COVID-19 relief and comparable coverage



Exclusive Content: Influencer Boxing

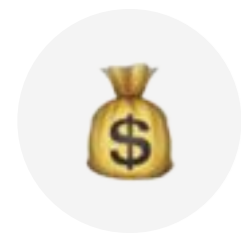
Logan Paul v. KSI II

The nationally-aired rematch brought on **2.25M live viewers**, with an additional **24M views** of post-match coverage. The match even outperformed pay-per-view numbers for an actual world title bout (*Joshua-Ruiz Jr*)



Esports

A peek into the 3rd biggest sport in the nation...



Revenue is larger than the **music and films industries' combined**



League of Legends World Championships brought over **3.9M live viewers**

Opportunities

Sponsor players, tournaments

Gaming houses, merch



Example: **Overtime**

- Started as a **social media presence** in 2016
- Built viewership in 2017 covering **top high school talent like Zion Williamson** (2019 #1 draft pick)
- Built a reputation for uncovering **high school prospects nationwide** on all socials
- Merch line becomes **iconic across creators**
- Expanding into **esports and gaming**

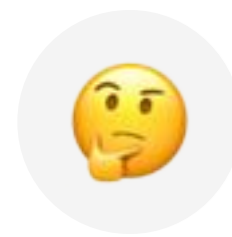


Example: JellyFam

A huge missed opportunity for sports media...

What was it?

A movement that put tri-state basketball on the map — **had players across the world saying “Jelly”**. Local event **beat attendance for Kevin Durant** at Rucker Park



NO sponsored events, merch, or social media push **besides from new age sports media**





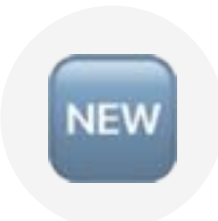
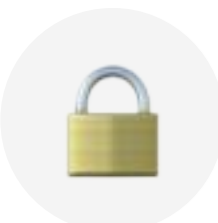
Backlash on Nike for plagiarizing Jelly brand

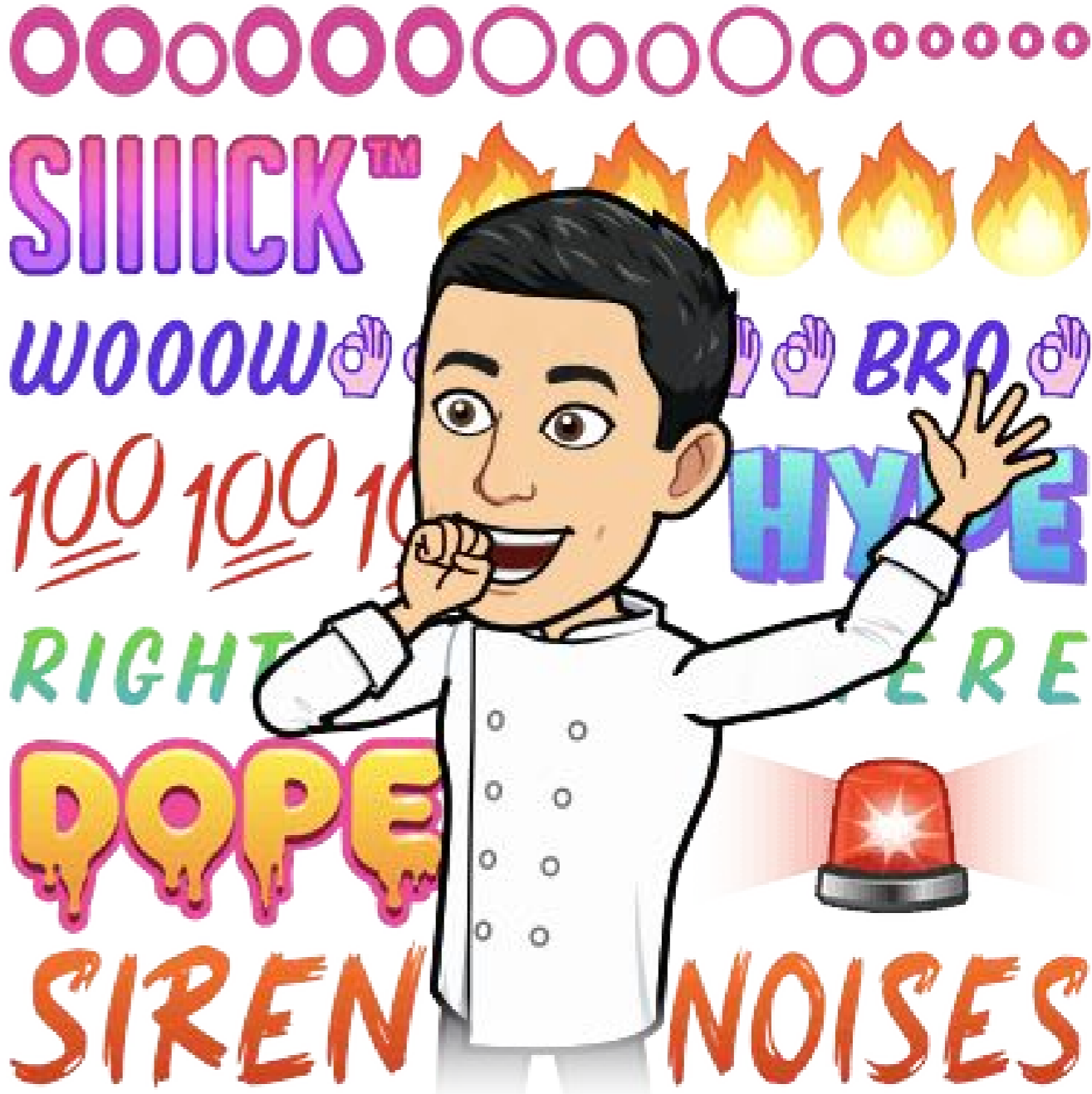


Exclusivity + Community goes a long way




Things to think about

The influencer community and the viewers they're bringing in — where could you bring Internet celebs? How could you incorporate them into events?

-  Know and **value your top fans**
-  Build a **2-way relationship** with fans
-  Start "**Overtime for X**" (nicher groups)
-  Give access to **exclusive content and merch**



Takeaways: **Community**

-  Do **untraditional collaborations** with athletes, brands not in your vertical
-  Partner with Internet creators on **creating products, content, and events together**
-  Drop **limited edition products**



11 Up & Coming

Up and Coming: **Social+**

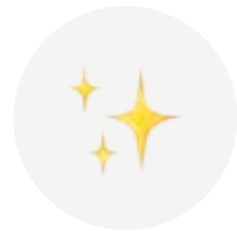
GENIES



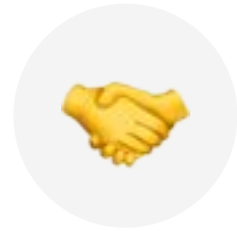
Genies

What is it?

The largest avatar company, pioneers in the creation of digital identities



Celeb avatars used by JLo, Justin Bieber, Rihanna, Russell Westbrook, and more



Partnerships with **Gucci, New Balance, NBPA, CDCF, Frito-Lay**, more



Launching upcoming **consumer SDK**



Bunch

What is it?

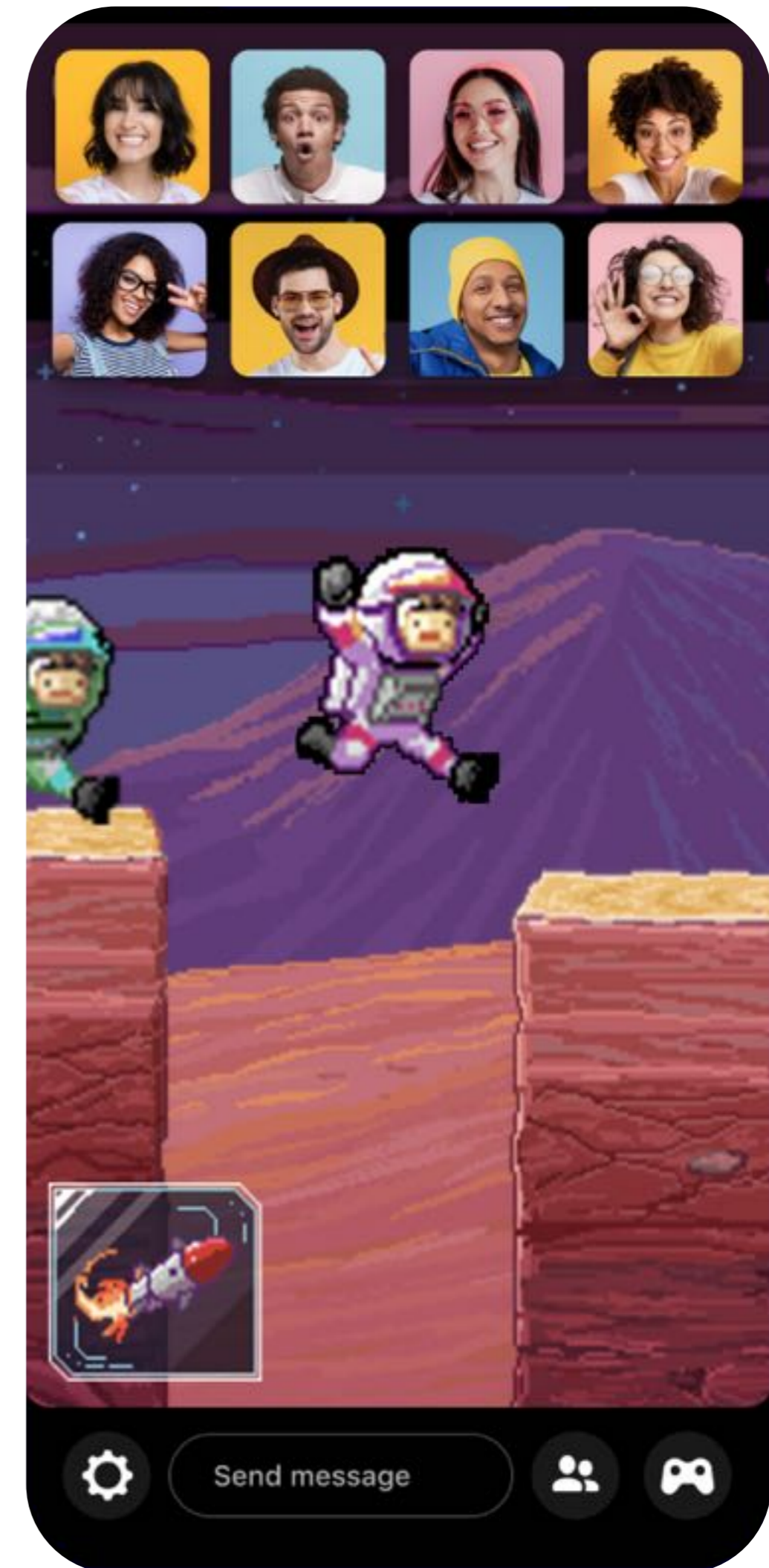
Mobile-first layer on top of games that links players together, recently raised \$3.9M



Makes mobile gaming **more social**



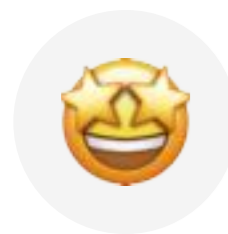
Supports titles like ***Minecraft, Fortnite, Brawl Stars, Flappy Bird***



Unfold

What is it?

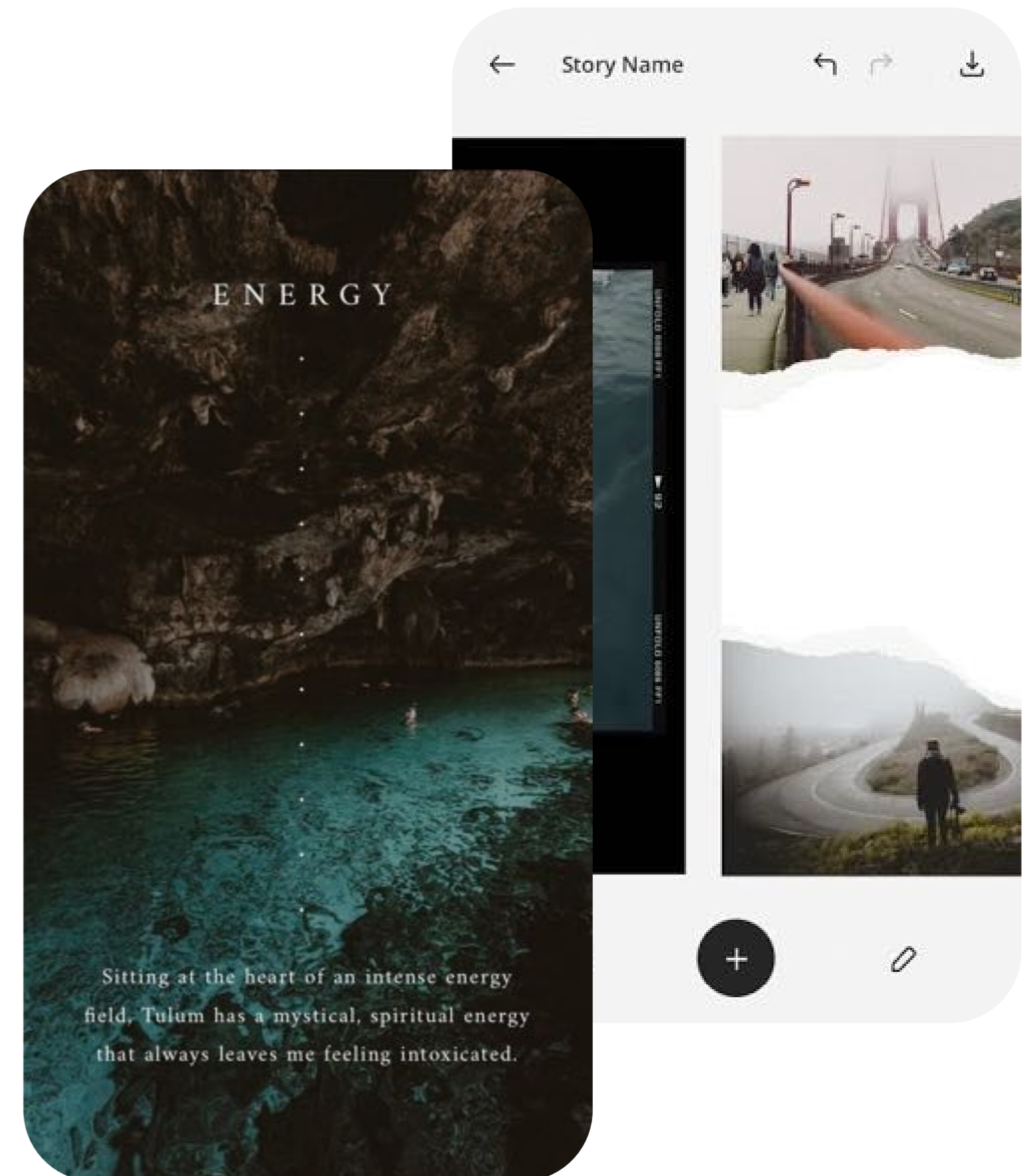
Mobile app to create stunning social media stories, recently acquired by Squarespace



Popular in an era where social media stories are becoming **more and more polished**



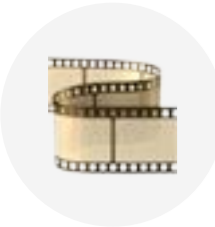
Over **1B stories** made by users



Lomotif

What is it?

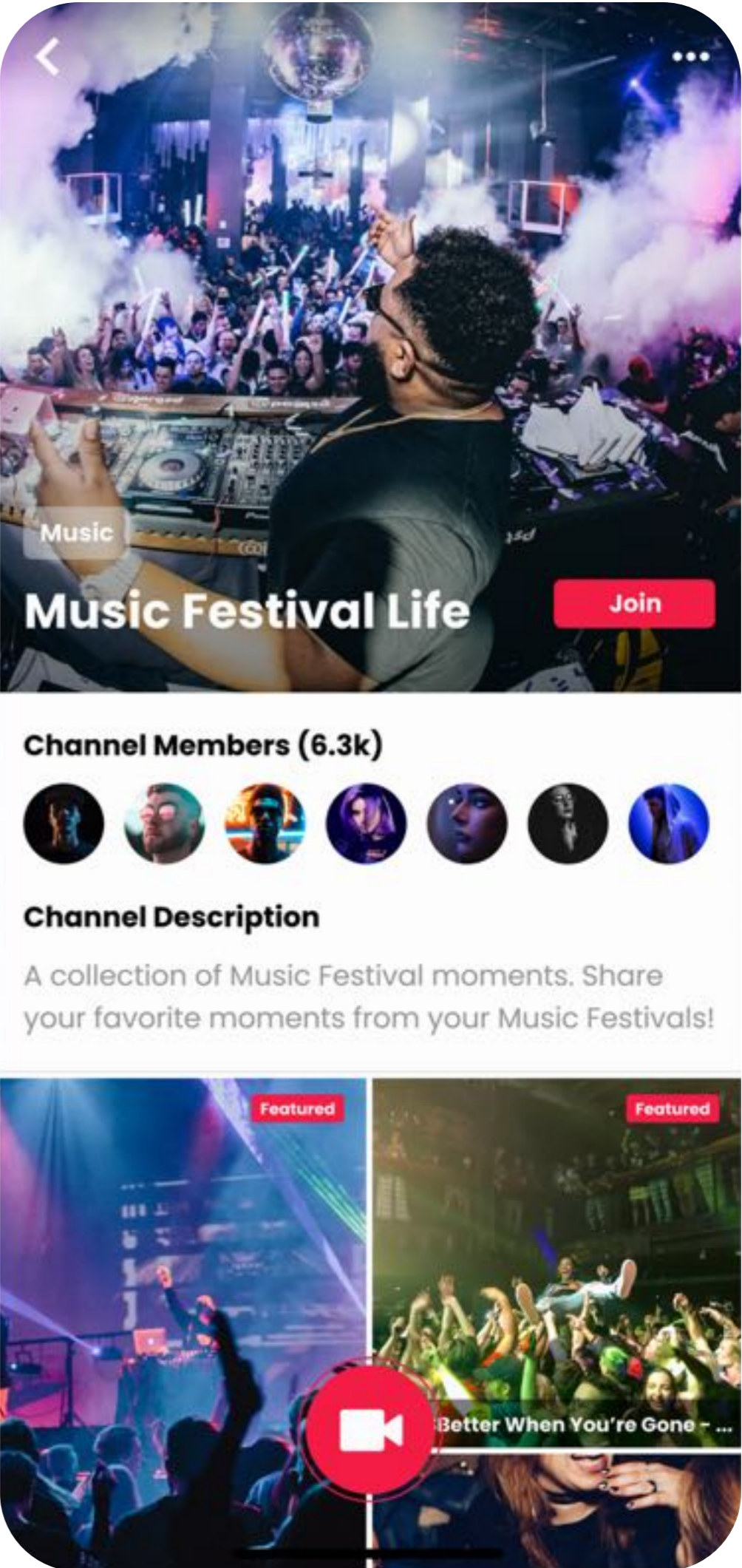
Social video remixing app with 150M+ downloads.
50M+ worldwide users, 70% are active users



More and more popular as social media videos become preferred consumption



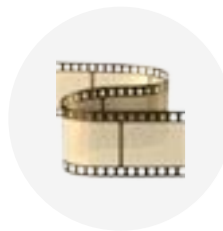
Alicia Keys, Miguel, Luh Kel have run campaigns on the platform



Triller

What is it?

Social video and entertainment platform with 250M+ downloads, 65M active users



One of many companies rivaling **TikTok**



Hired TikTok star **Josh Richards** as Chief Strategy Officer, Griffin Johnson and Noah Beck join as advisors



An obvious prediction is the growth of audio-focused products. We'll see more traditional entertainment pull on stories and IP that come out of podcasts, social audio experiments, and **hopefully see innovation in how we collectively participate in audio storytelling**

@jacksondahl

Founding Member, 100 Thieves



Gen Z is seeking out erotic content from the people they find hot. I believe the future of sex content is creator driven audio. **Visual sex content presents challenges (both ethically and technically) — audio is easy, discreet to make, and wildly pleasurable to consume**

@carospiegel

Founder and CEO, Quinn



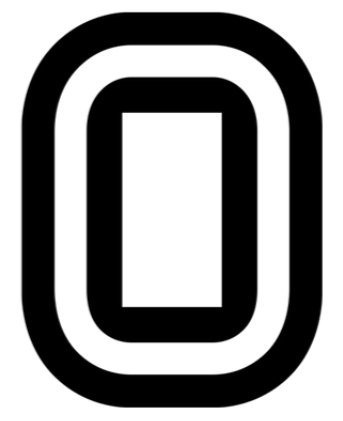
With the ubiquity of smart speakers and earbuds — and an increase in screen fatigue — **the pieces are in place for significant innovation in social audio**. We haven't improved much beyond the phone call yet and Gen Z is already leading the way on reimagining what forms a podcast can take — **expect social audio next**

@duboff

Head of Creator Product Marketing, Spotify



Up and Coming: Culture



invisible
NARRATIVES

Brat

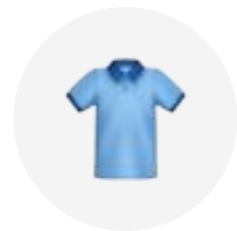
100 Thieves

What is it?

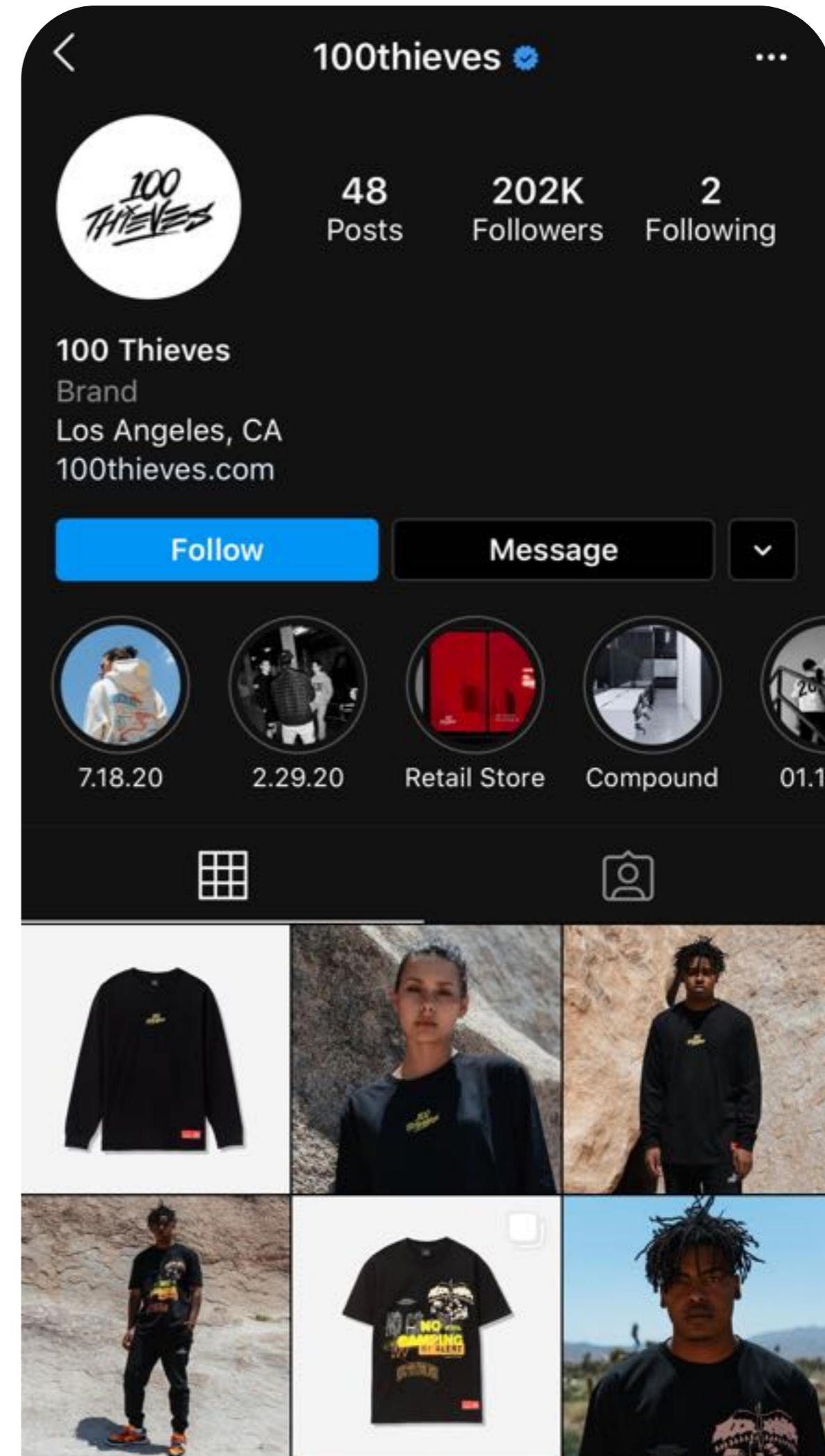
New age lifestyle brand and gaming organization



Building **content empire of streamers** across different games





Streetwear merch **constantly sells out**

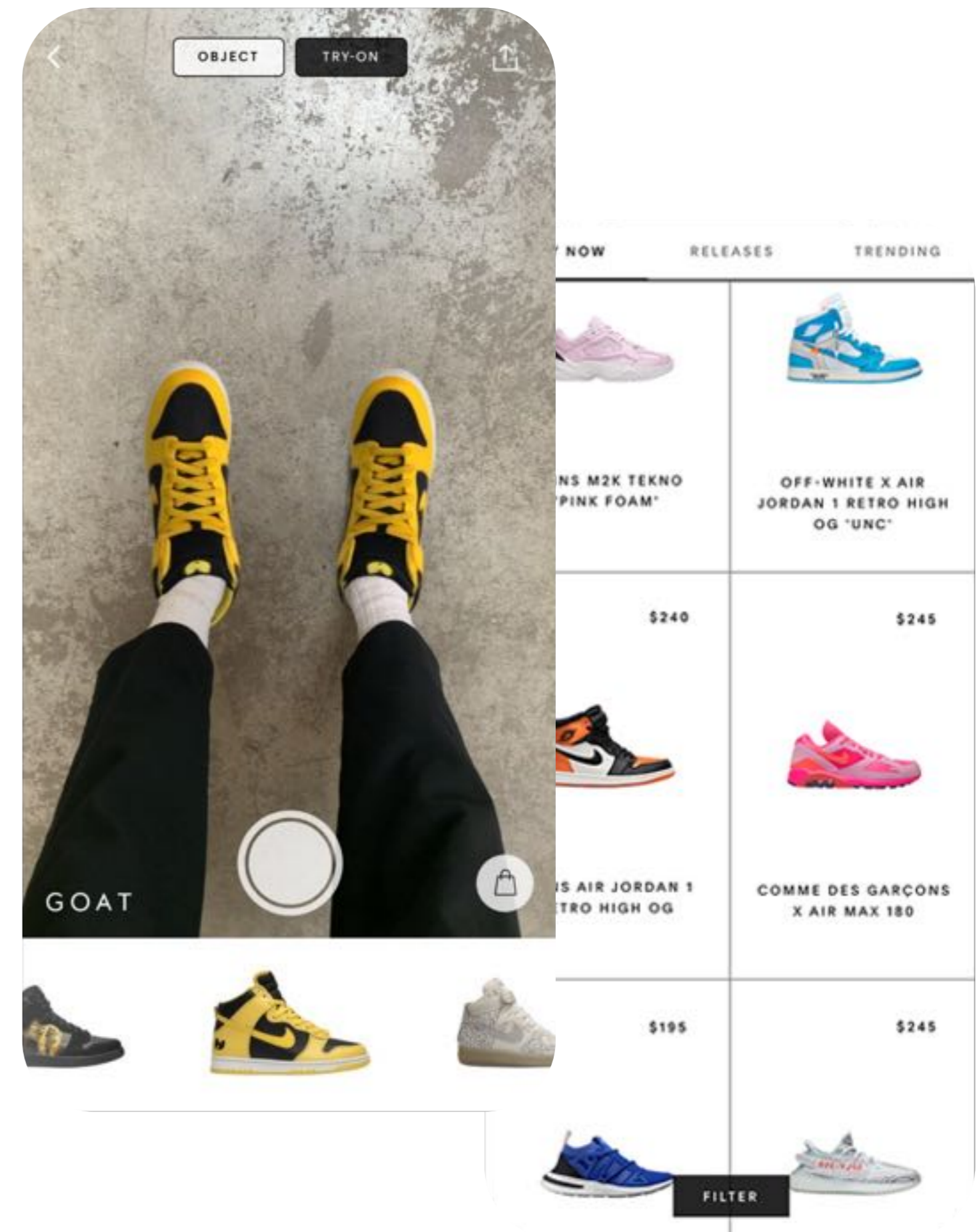


GOAT

What is it?

Marketplace connecting streetwear buyers and sellers, recently valued at \$500M

-  Authentication **minimizes fake apparel** circulating
-  Uses **YouTube influencer marketing** to increase brand awareness



MSCHF

What is it?

Social experiment company that drops viral products
2x a month, recently raised \$11.5M



Creators of Mr Beast's *Finger on the App*, *Severed Spots*, *Scream Club*



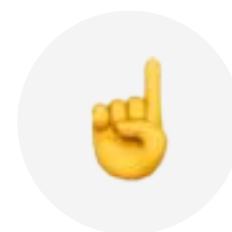
Consistent feature in press for viral stunts



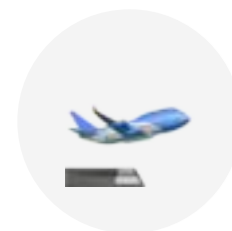
Overtime

What is it?

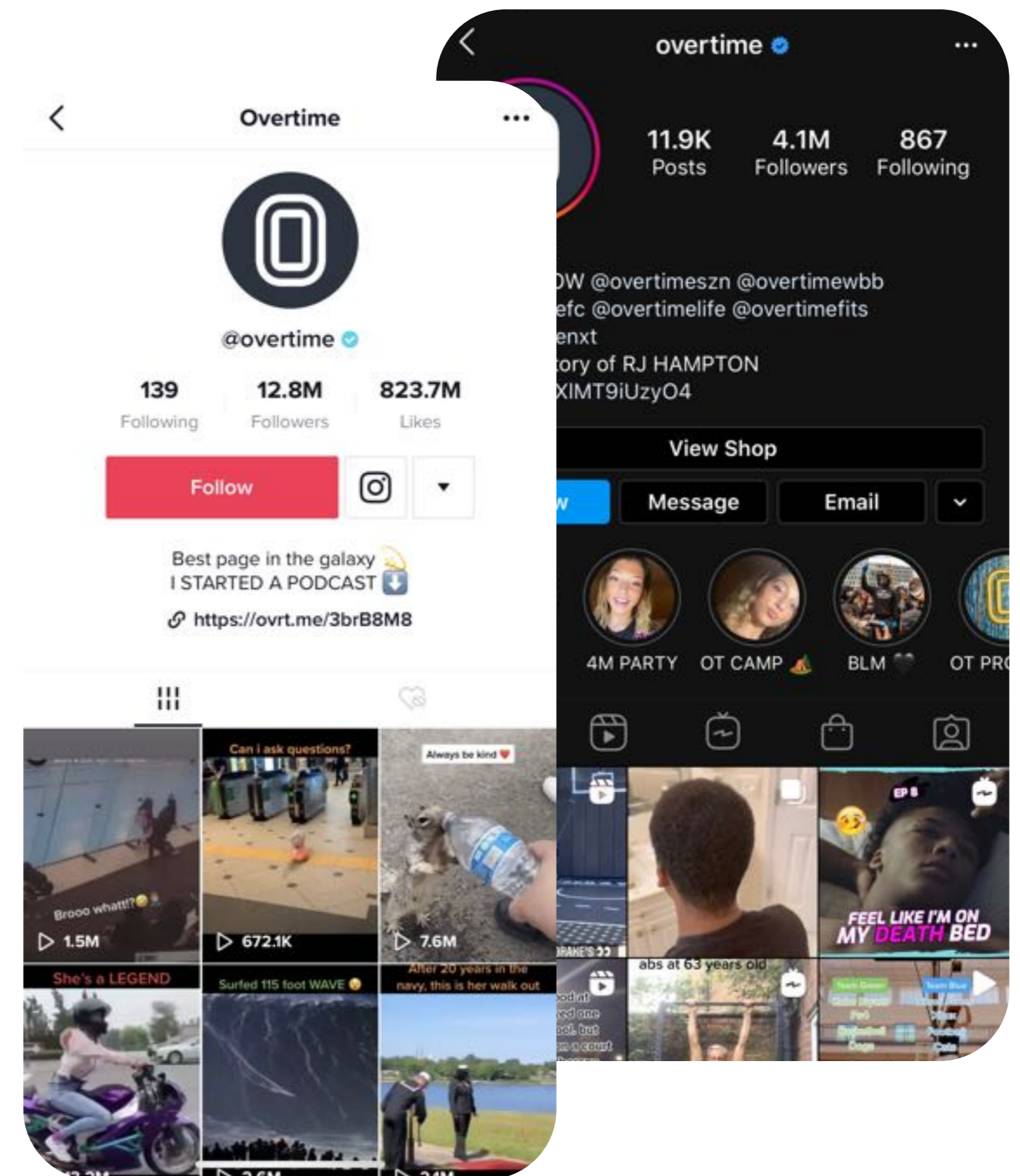
New age media company focused on young sports athletes, particularly high schoolers with 5M+ followers



First to feature many notable names



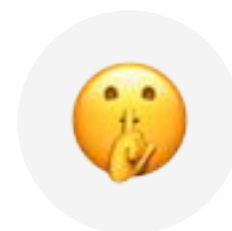
Expanding into **esports, other niche groups**



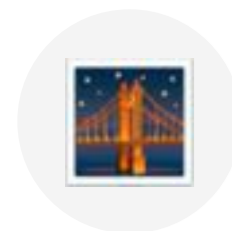
Invisible Narratives

What is it?

Digital production studio founded by prominent Hollywood execs



Songbird is a pandemic thriller produced by **Michael Bay**, featuring **KJ Apa** and **Sofia Carson**



Bridging the gap between YouTube content creators & traditional filmmakers



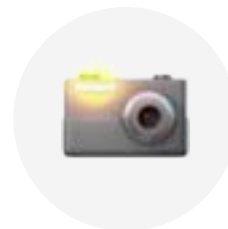
Partnership with **FaZe Clan** on multiple feature films



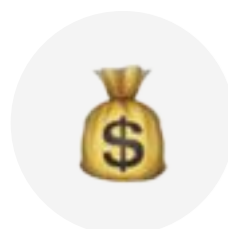
Brat

What is it?

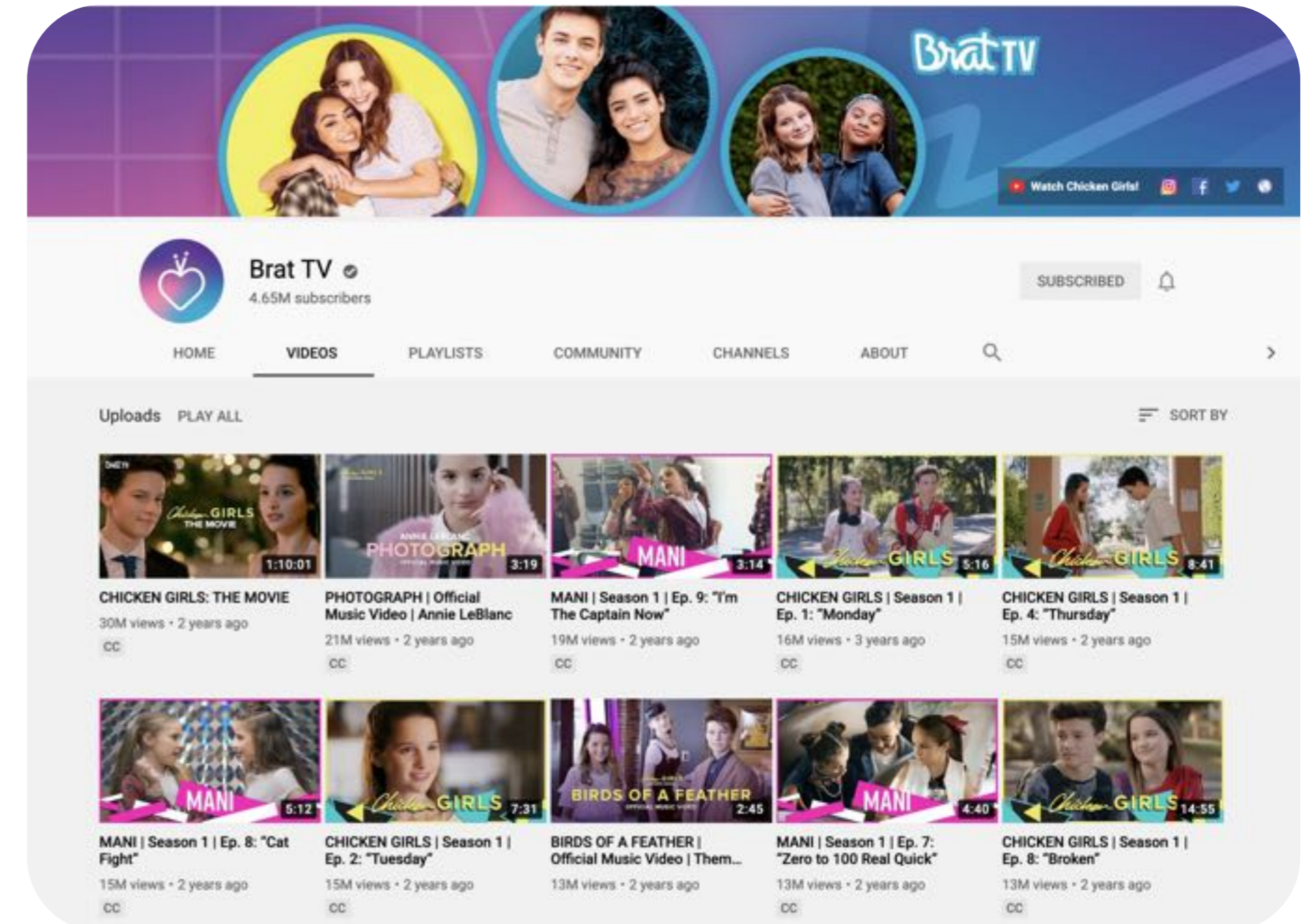
Gen Z media & entertainment company producing original shows on YouTube



Stars **social media figures** like Dixie D'Amelio, Griffin Johnson, Annie LeBlanc

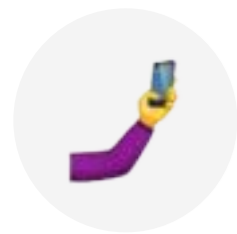


Cost-effective production setup compared to Netflix & Quibi

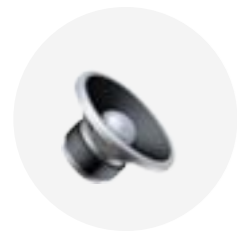


12 **Creator Brands**

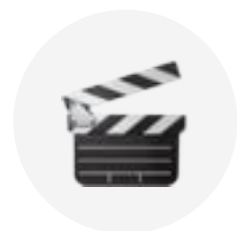
Creators are the new **brands**



Tap into existing fanbase for **free distribution**



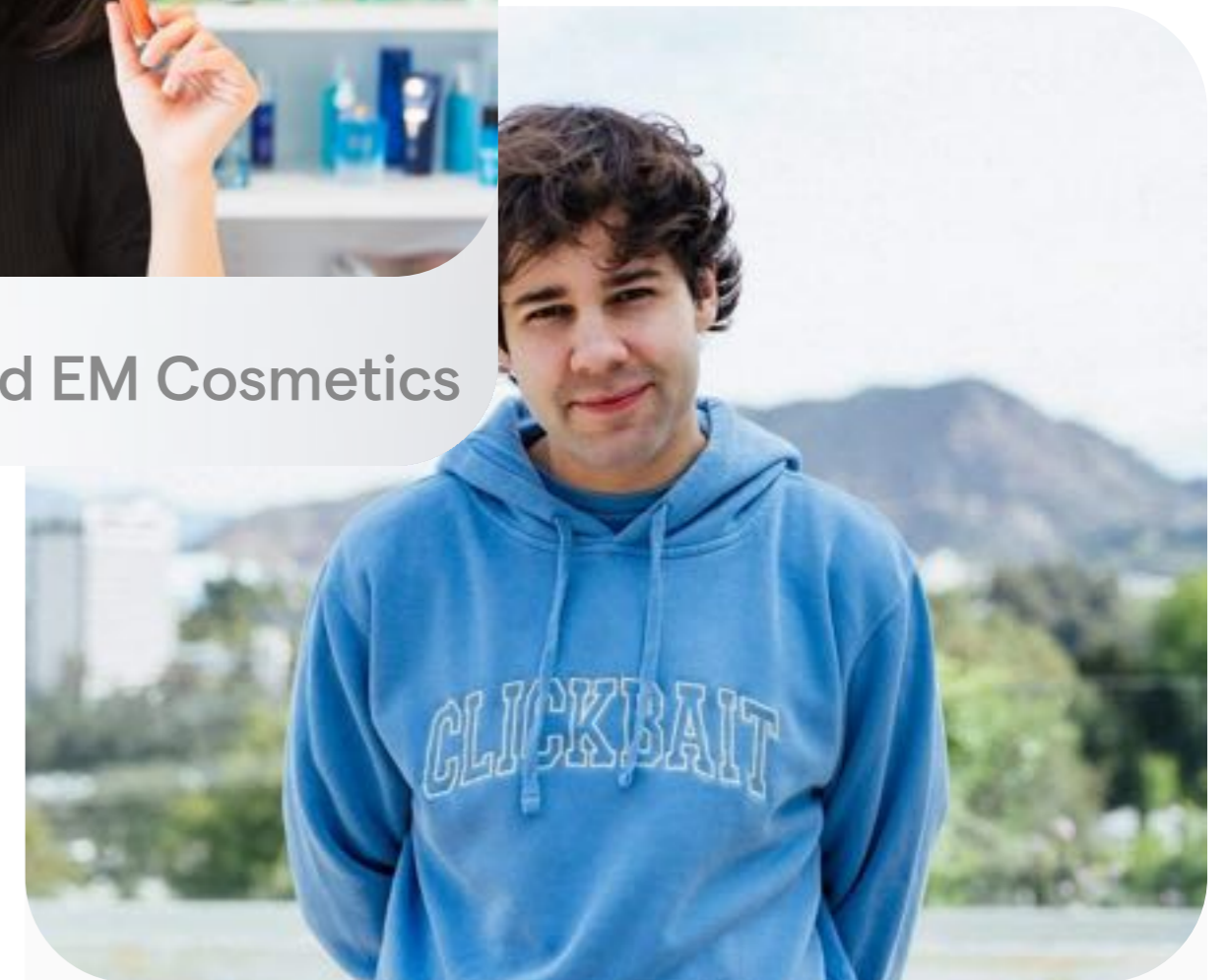
Work with audience to fine-tune products



Creators know how to **authentically promote products**

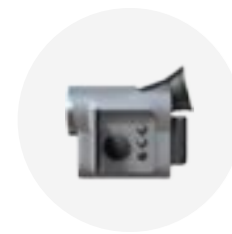


Michelle Phan and EM Cosmetics

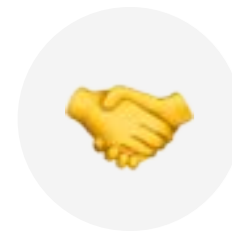


David Dobrik and Clickbait

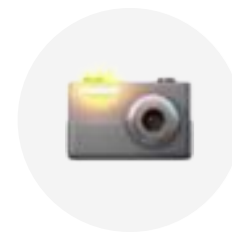
Creator to Brand: David Dobrik



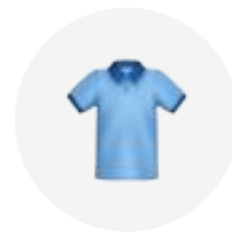
Releases a few videos every month with friend group — **millions of views**



Known to **never change content style for brand partnerships**



David's Disposable app has >1M downloads, raised VC financing



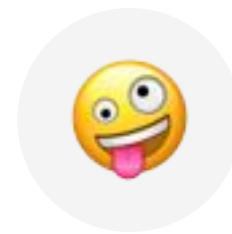
Clickbait merchandise is iconic, always sells out

Takeaway

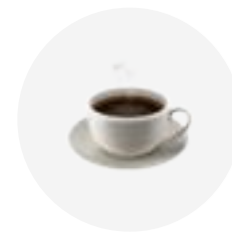
Trust great creators — they know their audience thoroughly



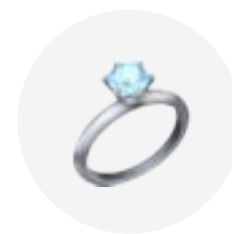
Creator to Brand: Emma Chamberlain



Built brand off **quirky, random, relatable content**



Chamberlain Coffee started from personal brand



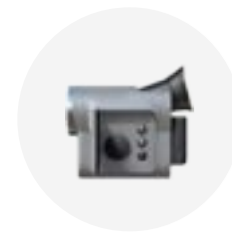
Sells personal items she knows her fans will buy —
scrunchies, coffee bags, paper planners, etc

Takeaway

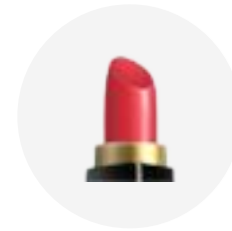
Fans will pay a premium for a share in their favorite creators



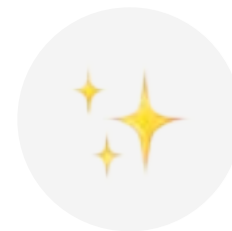
Creator to Brand: Michelle Phan



Posted makeup tutorials on YouTube, became **biggest beauty star at 1B+ views**



EM Cosmetics was started out of love for makeup, audience loves products



Founded **Ipsy**, which raised \$100M and is now valued at \$800M+

Takeaway

Creators can build long-term, sustainable brands and not just seasonal, one-product stores



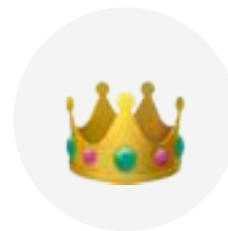
Creator to Brand: **Nadeshot**



Started career as a **competitive gamer** before moving over into content creation



100 Thieves was born out of personal brand



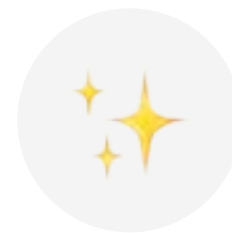
Capitalized on multiple avenues of gaming — **streetwear line consistently sells out**

Takeaway

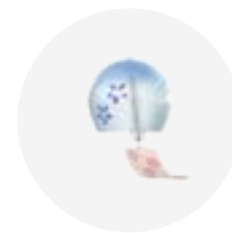
Being unconventional pays off in the long run!



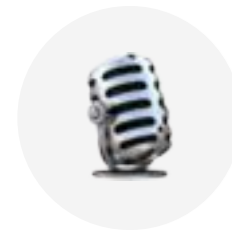
Creator to Brand: Dolan Twins



Hopped across social media — developed from **Vine stars to YouTube stars (50M+ across socials)**



Founded **Wakeheart**, a fragrance brand for Gen Z and Millennials with gender-neutral scents



Expanded into **podcasting**, among other channels

Takeaway

Consider entire fanbase when deciding what to sell!



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Alex Kern
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Special thanks to Trinity Moore, Jnyflower Choe, Thanh Thieu, Kiyoon Ko

Zebra is a platform empowering every creator to build a **business around your community.**

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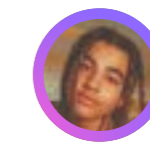
The Atlantic BUSINESS INSIDER The Economist VOGUE FORTUNE

Creators

Are you looking for a place to hang out with your fans all in **one place?**

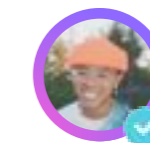
For early access, visit zebraiq.com/creators

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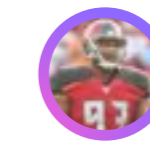
24kGoldn

#49 biggest artist



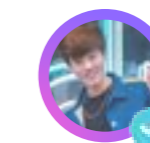
JustMaiko + Shluv

#7 biggest TikTok star (40M+)



Ndamukong Suh

Professional NFL player



Alan Chikin Chow

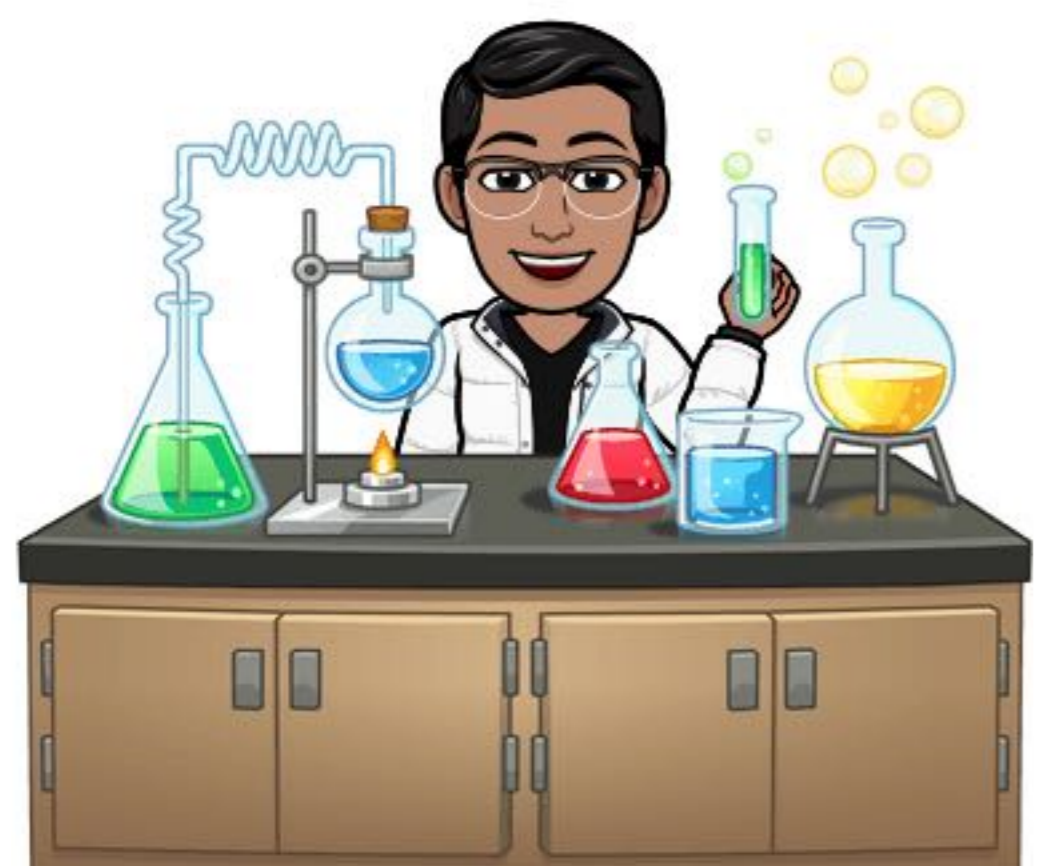
Official TikTok Ambassador

Brands

Are you looking to learn more about **Gen Z** or receive a **custom presentation** of this report?

Email brands@zebraiq.com

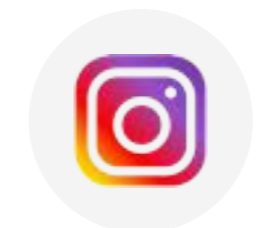
Any Questions? 



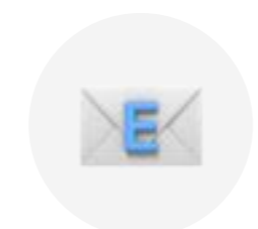
Thank you!



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