



TYDO TABLES²

Forging Their Own Path: Gen Z Meets DTC



02

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Setting the Table

Forging their path: Gen Z meets DTC 🦴

Gen Z is forever changing culture and commerce—in ways we couldn't have ever predicted or imagined.

As Olivia Rodrigo sings in “Jealousy, Jealousy”:

I kinda wanna throw my phone across the room
'Cause all I see are girls too good to be true
With paper-wite teeth and perfect bodies
Wish I didn't care

Rodrigo's lyrics reflect the feelings, values, and opinions of Gen Z—disillusioned with the state of the world and fed up with “performing online,” curated Instagram grids, airbrushed magazine covers, and the status quo. Goodbye, perfectionism, and #goals. Hello, authenticity and relatability. Think Billie Eilish and Emma Chamberlain (aka the Gen Z it girl).

In a recent L.A. Times piece, Snaxshot creator, Andrea Hernández said it best, “[Gen Z] is very much outspoken about imperfection as a counter to [the millennial] generation that wanted everything to be and look perfect.”

Deemed digital natives, Gen Z was born between 1996 and 2012. Other publications and research centers may differ, but for the sake of the Tydo Tables conversation and report, we're defining it as 1996 onward. Raised by the internet and faced with the Great Recession of 2008-09,

a global pandemic, and political polarization, Zoomers grew up in a world of constant criticism, scrutiny, and insecurity—physically, emotionally, and financially. As Cristina Tzintzún Ramirez, the executive director of NextGen America, puts it in The Atlantic, Gen Z is “the first generation in American history to be worse off than their parents.” Today, they are the largest generation in the US.

In addition to these lasting effects, Gen Z shapes and owns today's cultural discourse. We can thank them for the rise of TikTok, BeReal, Lil Nas X, DePop, and emojis, to name a few.

They're hustlers, self-starters, entrepreneurs, and content creators. Almost half of them have multiple side hustles, and altogether, they have \$360 billion in disposable income. Already, 62% of Gen Z have either started or plan to start their own business, per WP Engine and the Center for Generational Kinetics.

TikTok is their bread and butter. Some Zoomers are even replacing college degrees with the For You Page. 65% of Gen Z small business owners use TikTok as a resource to learn about business, per the Microsoft Store. In Bloomberg, Jo Cronk, president of Whalar, said, “TikTok is TV for Gen Z. If you want your brand, your product, your service to get attention with Gen Z, that's just a non-negotiable today.”

As Gen Z has grown up, so has the sheer number of DTC brands servicing these digital natives. Parade, Studs, Starface, Simulate, Topicals, Couplet, and more have latched onto this ripe and more have latched onto this ripe audience of consumers. And, some of these all-star brands are even founded by Zoomers.



A Gen Zer myself (I was born in 1998), I've always been fascinated by this generation of brands. What makes them come alive? How can we unpack and understand what makes them unique in comparison to millennial brands? Few journalists have attempted to tie together what makes these brands so special. Ben Schott is one of them. He pioneered the concept of “adorkable” brands in his [Bloomberg piece](#) last year, describing [BEHAVE](#), [Starface](#), and [Simulate](#) as part of the “growing gang of disruptive brands that deftly target Gen Z with a jarring visual aesthetic and an authentic emotional appeal.”

Fascinated by Gen Z entrepreneurs and this new wave of Shopify brands, we embarked on our second Tydo Tables report, centered around the question: What goes into building a thriving Gen Z-focused brand and reaching today's Zoomers?

Founders and operators can listen to as many webinars, join as many Slack communities, and engage with as many tweets as they'd like, but I've seen firsthand how IRL collaboration, creativity, and conversation lead to magical moments, ideas, and opportunities. Unfortunately for young (and first-time) brand builders, those moments—where they can speak openly and honestly about their struggles and ask questions without judgment—are few and far between.

That's why we created Tydo Tables—a unique experience where we gather niche groups of innovative DTC founders and operators to collaborate, problem solve and connect over passions, curiosities, and challenges.

So, we traveled to New York City to host yet another engaging Tydo Tables. From the brands taking over your For You Page to the ones launching in Urban Outfitters, we gathered 13, NYC-based, Gen Z-aged (some a little older) founders & operators at the hottest brands targeting this generation. Together, we shared a delicious meal and participated in a single, three-hour-long roundtable conversation around the biggest questions in DTC.

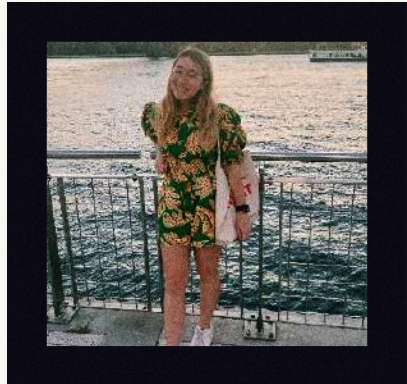
The only rule: No question or topic is off the table.

A little over one month later, we're excited to share the insights, takeaways, and thought starters from our second Tydo Tables experience.

We'll dig into the five key themes that shaped our conversation:

- All about the vibez
- Let's get functional
- Ur community = ur influencers
- Retail has a reputation
- The end goal? Exit.

Let's dive in.



Rachel Cantor
Brand & Content Marketing Lead at Tydo

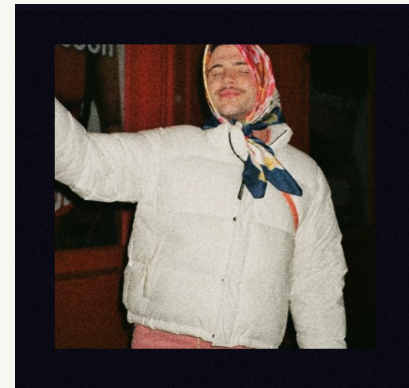


Contributors

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Annelise Hillmann
CEO & Cofounder, **Frontman**



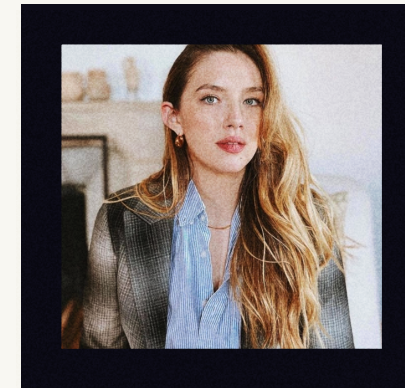
Dev Bowman
Community Growth Manager,
Parade



Drew Lederman
CEO & Founder,
Resist Nutrition



Emma Standing
Head of Customer
Experience and Ecommerce,
Bubble



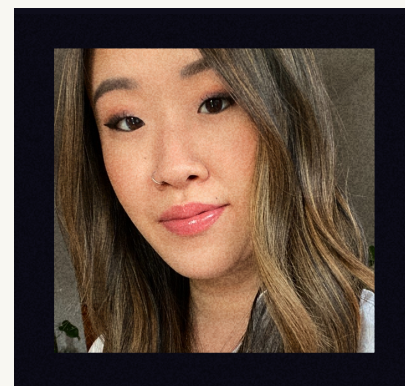
Erin Meskers
Senior Marketing Manager,
Cadence



Griffin Spolansky
Cofounder & CEO, **Mezcla**



Jade Beguelin
Cofounder & COO, **4AM Skin**



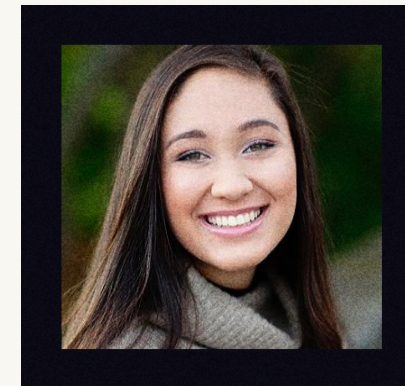
Jennifer Lee
Social Media Manager, **Studs**



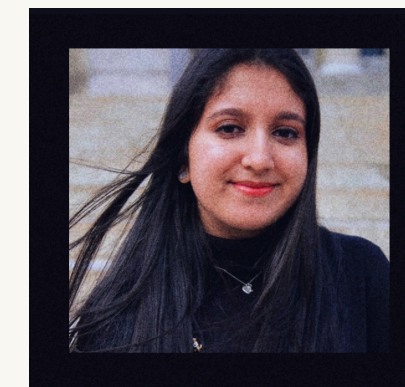
Jonah Reider
Founder, **Pzaz**



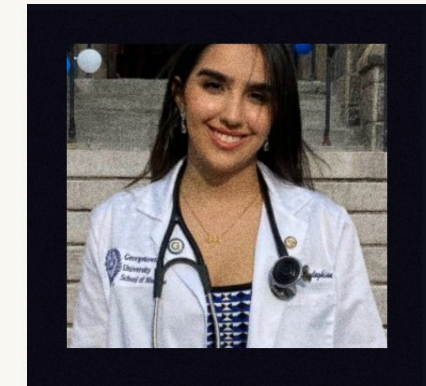
Lisa Guerrero
Cofounder & CEO,
Experiment



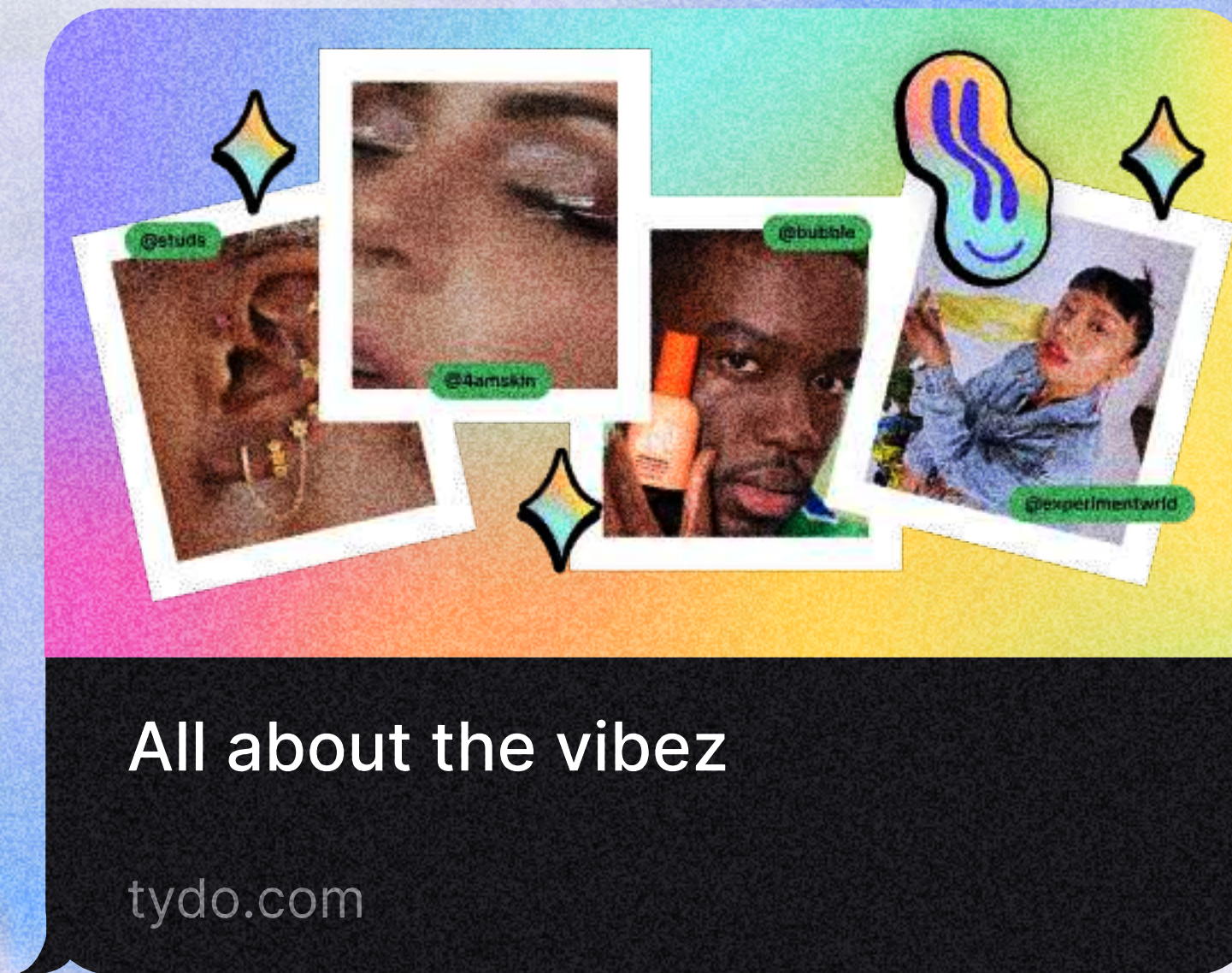
Nadya Eddy
Content Director, **August**



Zehra Naqvi
Senior Investment Associate,
Republic



Sabrina Sadeghian
Founder & CEO, **4AM Skin**

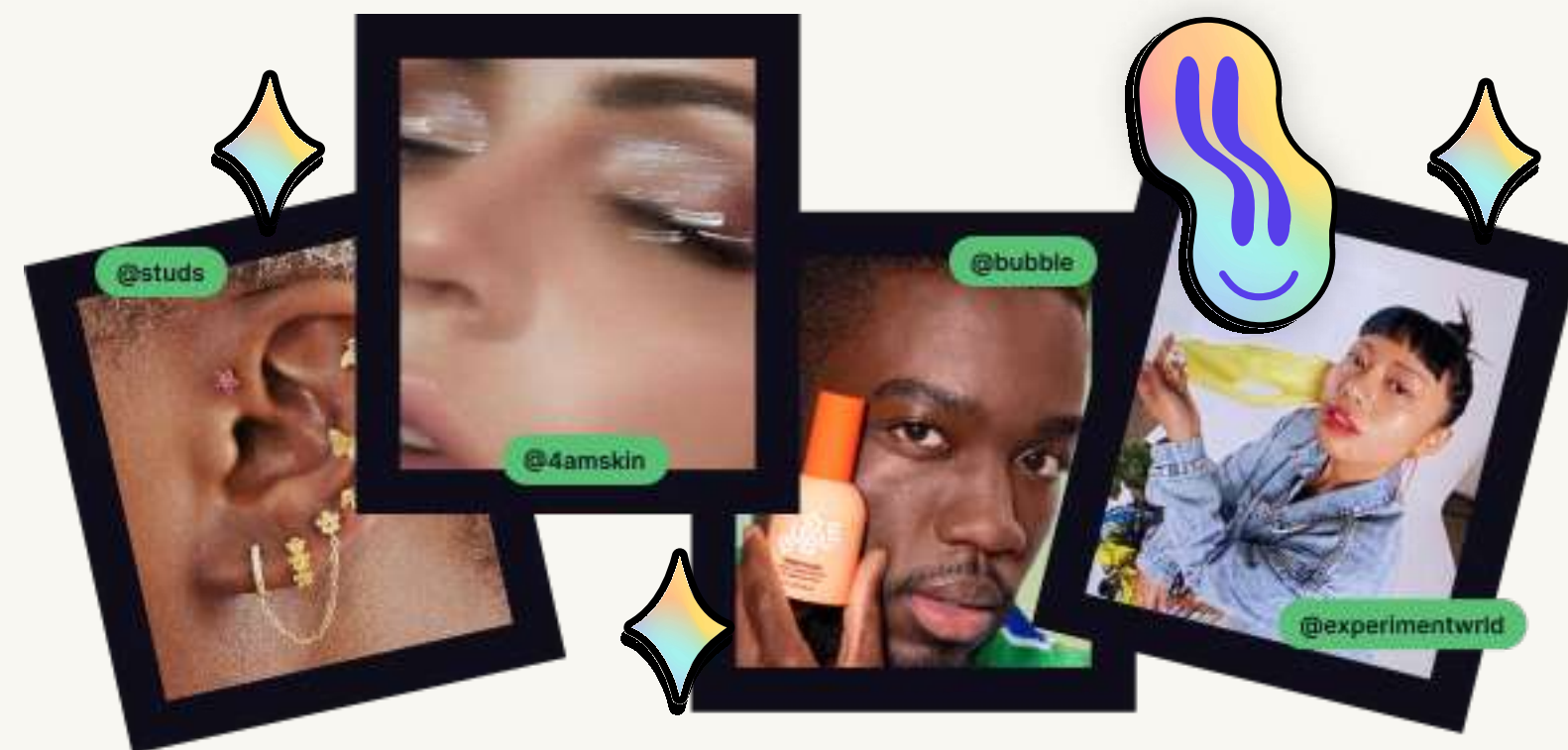


what a vibe 🙌
Delivered

1. All about the vbez → → → →

**Do you or do you not
have the right vibe?
That is the question.**

Welcome to the vibes economy →



W

hat are the defining traits of a Gen Z brand? How and where do they come alive? What makes these brands thrive? How do they develop cult-like followings?

Without a doubt, it all comes down to vibes for the Gen Z consumer.

Now, **“WHAT ARE THOSE?”**

“We know the meaning of the word ‘vibe,’ of course. It’s a placeholder for an abstract quality that you can’t pin down—an ambiance (“a laid-back vibe”). It’s the reason you like or dislike something or someone (good vibes vs. bad). It’s an intuition with no obvious explanation (“just a vibe I get”),” writes Kyle Chaka in the ***New Yorker***.

Vibes are ephemeral. They’re ever-changing, just like Gen Z. For brands, vibes build humanness and connection. More so, they help Gen Z-aged consumers organize and categorize brands in their minds and answer the following questions: Does this brand speak to me? Do I want to pay attention to this brand? Do I want to make a purchase? Do I care about this product? Does this brand align with my values?

“A vibe can be positive, negative, beautiful, ugly, or just unique. It can even become a quality in itself: if something is vibey, it gives off an intense vibe or is particularly amenable to vibes...Through our screens, vibes are being constantly emitted and received,” notes Chaka.

As **Ana Andjelic** puts it, “Aesthetically, vibes give a brand a cultural shortcut (e.g. weird girl aesthetics, giant fit chinos). In terms of audience management, vibes create a human connection - due to their ambiguity, provocation, and openness to interpretation, they are the opposite of transactional. Vibes make us pay attention.”

To the human eye, vibes mostly translate into the visual identity of a brand. But, a vibe can be brought to life via product development, copy, or even content.

Every brand has a unique vibe.

The girls who get it, get it. And the girls who don't, don't.

Take Gen Z-centric beauty brand **Experiment**, for example. Founded by **Lisa Guerrera** and **Emmy Ketcham**, the brand aims to redefine the science-backed beauty space with a lineup of sustainable products. Earlier this year, they launched **Avant Guard**: a lime-green colored, reusable mask, made from 100% medical-grade silicone. Imagine if *The Mask* met Dua Lipa's *Future Nostalgia* album.

Unlike other science-backed beauty brands, Experiment doesn't take itself too seriously. It's playful and expressive. “Other brands give off lab coat, stodgy, stuff vibes,” notes Guerrera. “My cofounder and I are both young chemists, and we don't view chemistry in that way. Instead, we wanted to curate a vibe that's welcoming, community-oriented, and fun.”

Why do vibes matter?

Creating a vibe is one way your brand comes to life. Today, brands are dynamic in the same way that we, as humans, are dynamic.

A brand is more than a brand. It's about the people behind it, the values, the mission, the larger vision, etc. If anyone knows that, it's Gen Z.

Jade Beguelin and **Sabrina Sadeghian**, cofounders of **4AM Skin**, see their brand as an influencer of its own. On Instagram, they share posts about the product as well as memes that have nothing to do with skincare. They're vibe-building—creating a story and a persona that's dynamic and extends beyond the skincare space. “We find that people want to be a part of something bigger and not just engage with the brand. They want to engage with the overall vibe too,” says Sadeghian. It's about a feeling the brand creates.

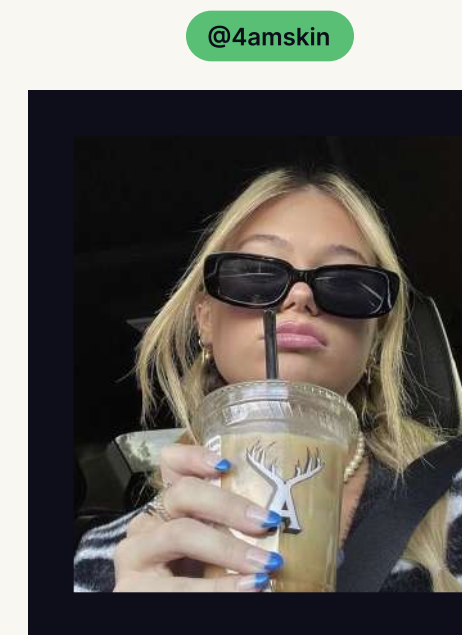
Gen Z wants to know it all—the good, the bad, and the ugly. They want the truth. **Emma Standing**, head of customer experience and ecommerce at **Bubble**, an affordable, science-backed skincare brand specifically built for teens, explains, “The Gen Z consumer doesn't appreciate any secretive nature to your brand. It's all about good vibes.”

A brand is a living, breathing being, and as brands take on more human-like qualities, the people behind them play a pivotal role in bringing the brand's “vibe” to life.

More importantly, the people behind the brand need to embody the vibe.



@experimentwld



@4amskin

And, Gen Z founders are doing just that. **Annelise Hillmann**, cofounder of **Frontman** explains, “As a generation, we lost trust in the brands we grew up with. Creating something for yourself and your peers is very different than someone thirty years old than you, sitting in a boardroom dictating what they think you want. That’s just very disconnected from reality.”

What’s a recent example of a brand that’s not built with a Gen Z vibe in mind? The founders and operators at Tydo Tables cite the **latest Victoria’s Secret rebrand**. “To me, the rebrand feels like 60-year-olds thinking about what Gen Z wants,” explains Sadeghain. “That’s why young people should be in board-level positions, especially at legacy brands.”

Build for *who* and *what* you know.

“I can’t relate to a boomer. I can barely relate to a millennial. I know my space is Gen Z,” Sadeghian adds. “I’m not trying to build a brand for someone or something that I don’t know anything about.”

As brands become more dynamic and human, should they stand up for social and political issues?

The grand majority of founders and operators at the table believe so. At the end of the day, a brand is a collection of people who work for a brand, says Annelise Hillman. Consumers want to know what those people believe in, and if a brand says nothing, no one will know.

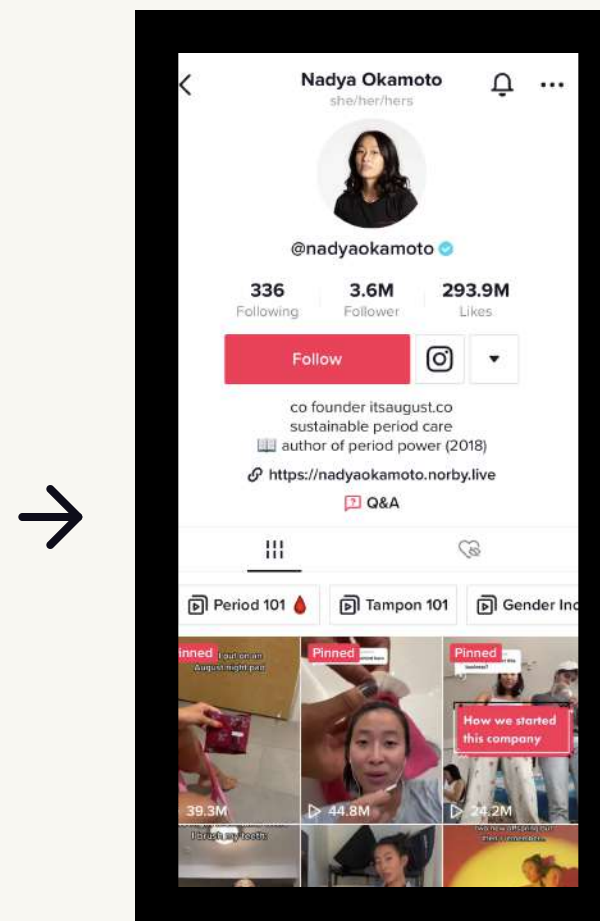
“It’s a competitive advantage to be small and young enough not to risk speaking up,” adds Lisa Guerrero. “It gives you the ability to react quickly and easily to what’s happening in the world and be a person first before a brand.”

Sometimes, you have to pick and choose your battles. Jade Beguelin says, “If you’re a brand for everyone, you’re a brand for no one.”

If brands are dynamic and more human-like than ever before, how does that “humanness” come to life?

Finding a face to your brand is the easiest place to start. It’s not that difficult since so many founders are built-in influencers, such as **Nadya Okamoto**. She’s the cofounder of **August**, a sustainable menstrual care brand, with **3.5+ million TikTok followers**. She uses her platform to chat about all things August, open up about her personal life, share travels, adventures, and more. She’s honest, open, and unapologetically herself—building not only her brand but that of August’s as well.

Okamoto has encouraged her team to do the same with the **August account**, which has 285.7K+ followers. Every August team member has a login to the account. **Nadya Eddy**, August’s content director explains, “We have gut checks. We come in and share our personal beliefs and which ones we think translate to the brand. We have our own lists of things we like to talk about, and if you want to post about one of those topics, you can. Now our audience is getting to know our team personally. Some people will even message our account and ask, ‘Is



this Neddy? Is this Elena?’ We kind of like that everyone has their archetype.”

In a **Thingtesting** piece, Okamoto said, “TikTok is a place where you can say a lot in 30 seconds. And the best person to do so is the person who lives and breathes the brand” (the founder or team members aka the face).

Okamoto isn’t the only founder who’s also an influencer. Beguelin has **18.1K+ followers** on TikTok. Sadeghian has **83.8K+ followers on Instagram**. Guerrero has **62.8+K followers** on TikTok. These founders harness their unique personal platforms to grow their brands and show their humanness. These platforms serve a top-of-funnel purpose.

Plus, more people are likely to remember your brand if there’s a face to it. That especially rings true in the age of TikTok. At the same time, Gen Z founders recognize the risk. “There’s something scary about adding a face to the brand,” states Beguelin. Putting yourself out there is scary, but it just as well may pay off in the long run.

Other brands lean into community; they leverage community members to be the “face” of the brand.

That’s the case for **Studs**. Their founders aren’t present on their social media accounts. They aren’t the “face” of the brand. “Most of our virality on TikTok comes from our community,” says **Jenn Lee**, social media manager for the brand.

The whole store experience invites and welcomes customers into the Studs’ world—one that promotes self-expression, creativity, and authenticity. Lee adds, “Studs is all about self-expression, so we allow our community to tell that story to their audience.”

They lean into that community to encourage Gen Z consumers to create a “hole new you.”

In addition to creating a face, it’s about crafting a brand voice.

“I feel like it’s all about a voice more than a face,” says **Jonah Reider**, founder of **Pzaz**, a caffeinated energy mist that launched in September 2021. “A brand should have a strong, consistent voice that manifests itself across a variety of faces.”

Pzaz has a sassy, clever tone of voice. Take a look at their **Twitter**, and you’ll be bombarded with a series of aggressive (and hilarious) tweets in ALL CAPS.



CAN SOMEONE EXPLAIN TO ME WHAT “DROP SHIPPING” IS AND WHY 17 YEAR OLDS ARE BUYING MASERATI’S BECAUSE OF IT

Experiment is another Gen Z brand leveraging copy to curate a vibe and level with a Zoomer audience. “Our audience will now say, ‘It’s giving us sexy alien vibes.’ We give them the language to help them feel like they’re a part of the Experiment universe,” adds Guerrero.



@studs



Ultimately, there are multiple ways to craft a vibe—whether it’s through a face, snappy copy, or both. “What works best for one of us won’t work for some of us at this table. That’s what’s cool about Gen Z. It’s a lot of trial and error. Your community will let you know very quickly what they like and don’t like,” says Nadya Eddy.

But, one throughline: All these brands tap into Gen Z’s obsession with nostalgia.

Fraught with the pandemic, the Great Recession of 2008-09, and mental health challenges, this generation longs for simpler, better times. In an **Insider article**, Krystine Batcho, a Le Moyne College professor and psychologist, said, “Nostalgia is a refuge, as people turn to the feelings of comfort, security, and love they enjoyed in their past.” Gen Z brands know the Zoomers crave it.

“Brand is all about nostalgia. You can always trace creative, aesthetic moments in culture back to the nonstop pendulum of being somewhat nostalgic about something,” explains Jonah Reider. “Nostalgia is such an evergreen place to start for any creative initiative.”

Parade, a sustainable intimates brand and Gen Z fan favorite, capitalizes on nostalgia to connect with its audience. **Dev Bowman**, community growth manager, says that Parade followers go crazy whenever the brand nods to Lizzie McGuire, specifically the episode where she gets a bra.

← Look at their Instagram, and it’s filled with pics referencing **the best slumber party scenes** (*13 Going on 30*, *The Cheetah Girls*, *Princess Diaries*, to name a few), **High School Musical 2**, **shrinky dinks**, and **Mary Kate and Ashley**.



@parade

Frontman was built on nostalgia. Originally, the men’s grooming brand went by a different name until Hillmann and her cofounder **Nick Bunn** encountered trademark issues. They rebranded and renamed the company while sitting at a diner at 11 pm, jotting down different names on a napkin (they still have it) until they landed on Frontman.

“Immediately, when we said Frontman, the iconic image of the ‘70s, ‘80s, and ‘90s music idols—think Freddie Mercury and Michael Jackson—all came to mind. We tap into that image for the brand. It all boils down to confidence,” says Hillmann. “That’s what Frontman is all about. Plus, it goes back to nostalgia. It ties into the ease of life and ease of being that came with that time.”

Even Experiment’s vibe is built around nostalgia. “We looked at Silly Putty, lava lamps, and the space age for inspiration (aka when the US was optimistic about science),” adds Guerrera. “We wanted to nod to the fact that we’re starting a new era in beauty that’s optimistic about science and what it can do for you and your skin.”

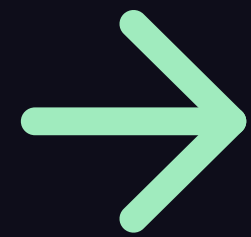
“Gen Z is all
about the vibes.”



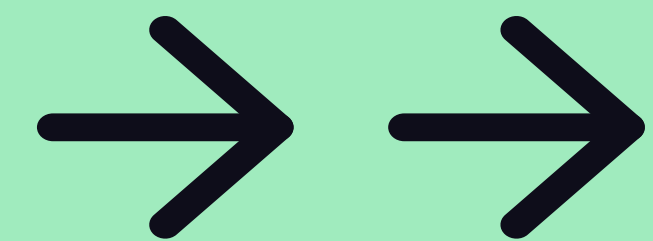
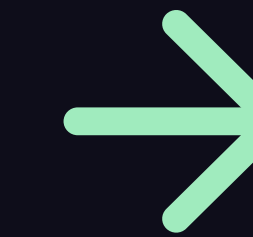
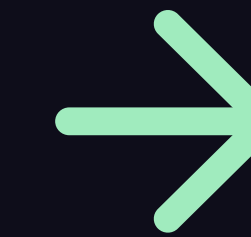
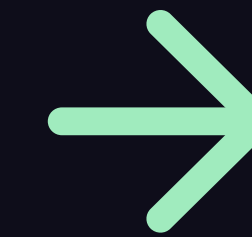
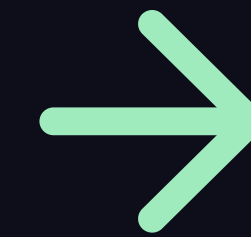
Lisa Guerrero

Cofounder and CEO, **Experiment**

THEME 01



DATA



42% OF GEN Z

**EXPECT BRANDS TO BE BRAVE
(YUGOV PROFILES).**

59% OF US GEN Z

**AGREE "I LIKE BRANDS THAT ARE
WILLING TO GET INVOLVED IN SOCIAL
ISSUES". (YUGOV PROFILES)**

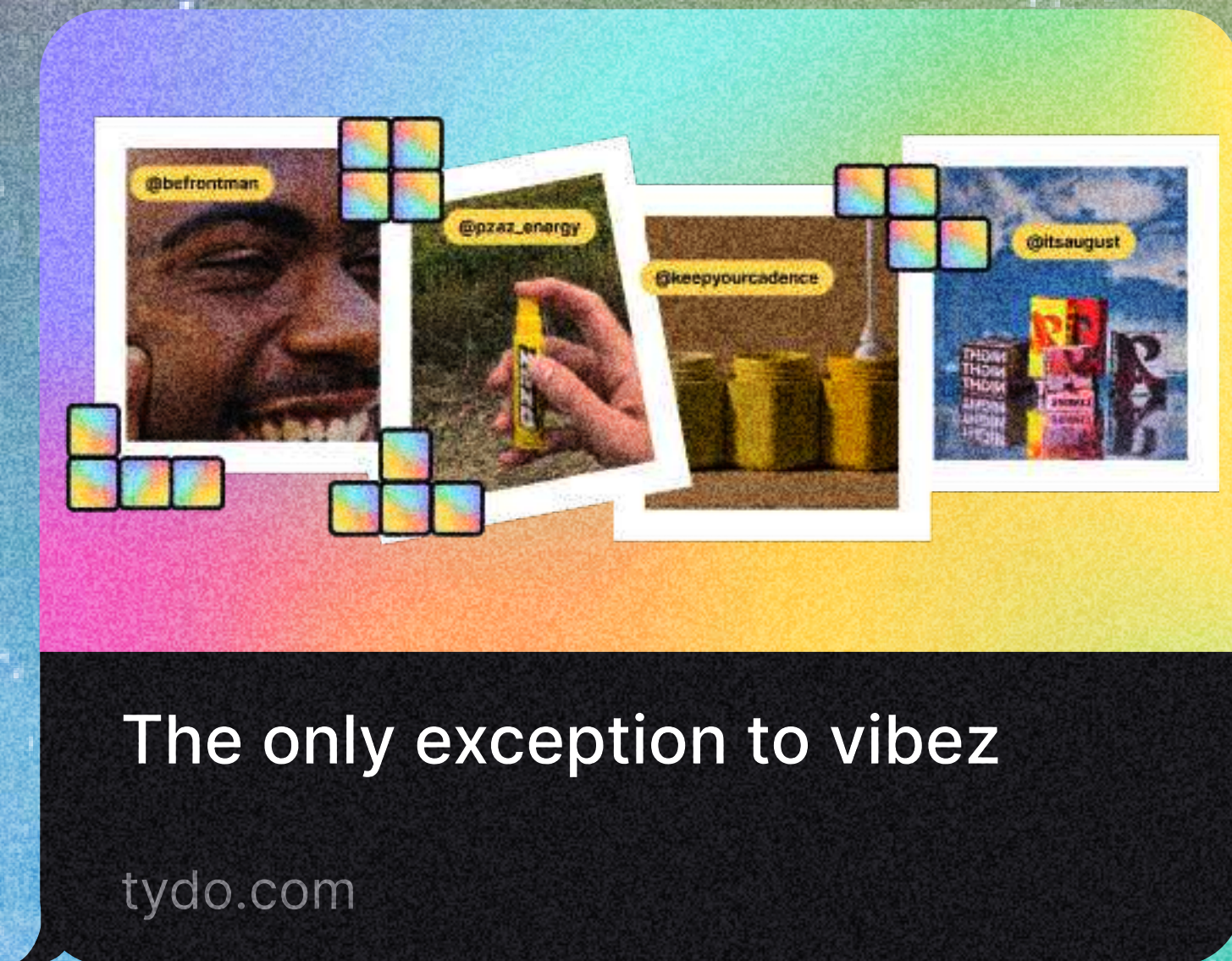
64% OF GEN Z

**SAYS BRANDS DON'T UNDERSTAND
PEOPLE THEIR AGE (VS 45% OF
MILLENNIALS) (YUGOV)**

1 IN 5 GEN ZERS

**SAY THEY WERE INFLUENCED BY A BRAND'S
ETHICS WHEN MAKING A PURCHASE DECISION
(WUNDERMAN THOMPSON)**

← ← ← ← 2. Let's get functional



Function FTW

Delivered

Let's get functional →

The one exception to vibez: function.



Yes, Gen Z loves the vibes, but there's one thing they love even more, and that's a functional product. "I guess I wouldn't necessarily call myself a vibes enthusiast," states **Jonah Reider**, founder of **Pzaz**. "I think products have to have visuals. But, it's so much more about function for Gen Z. Does the thing f**king work? Does it fill a functional need?"

Pzaz has a unique vibe—one that we would describe as bold, Y2K-inspired, and almost comedic—but "vibe" isn't the number one priority, notes Reider. "For me, Pzaz is all about an obsession with this sense of fatigue for DTC, food & beverage snack items. I became fascinated by America's convenience store culture and where we actually buy food and beverage. Pzaz is reimagining what I believe to be the worst, least competitive, and sh*ttest category at convenience stores and gas stations," he adds.

We all consume some form of caffeine or energy. Energy drinks are great consumer products; however, they don't fit in a pocket or purse. So, he asked himself, "What's ultra-affordable? What's accessible?" Those questions led him to develop a portable, caffeinated breath spray. It's a quick way to charge up, whenever and wherever.



Pzaz is a prime example of a product rooted in function.

“Taste isn’t the primary reason someone would buy Pzaz. Hopefully, it tastes good, not terrible,” adds Reider. “It’s functional. You buy it because you want to wake up and find the cheapest, most affordable, most exciting, expressive way to energize.”

“Gen Z wants brands that appeal to what actually matters: a working product,” says Sabrina Sadeghian, cofounder of 4AM Skin.

Griffin Spolansky, cofounder of Mezcla—a plant-based protein bar brand—prioritized building a strong product over vibe. Now, he’s focusing on retention aka how you win in the long run. “You’re losing money on the first order. I’d be surprised if anyone at this table doesn’t,” says Spolansky. “So, you need to feed that customer, and it all comes down to a functional product.”

If the product isn’t filling a need or solving a problem, the consumer will walk away. There are plenty of other options on the market, especially in the protein bar space.

If it’s all about function, then where does sustainability fit in? Does sustainability matter to Gen Z?

Most sustainability reports emphatically say yes. Gen Z is 73% more likely to pay 10% or more for sustainable goods, per a First Insight study. But, is there real truth to that stat? Does it ring true in practice?

Sustainability is always top of mind for Erin Meskers, senior marketing manager at Cadence, which makes reusable, customizable, magnetic capsules for everyday essentials. The brand is rooted in sustainability. Ocean-bound plastic makes up **20% of Cadence’s finished capsule**. Scrap material makes up an **additional 30% of a capsule**. Last but not least, their boxes are made from 100% recyclable cardboard, their shipping labels are compostable and recyclable, and their seed paper is plantable. Cadence goes to great lengths to be environmentally-friendly—a value near and dear to Cadence Founder Steph Hon’s heart. And, crafting a sustainable product of that caliber is not a cheap process, by any means.

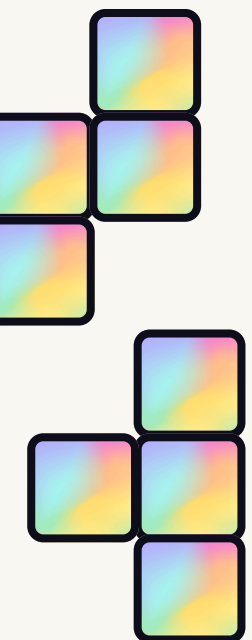
The key question: Is it worth it?

Time and time again, Meskers sees users drop comments about the price of the brand’s products on TikTok. Some people even share links to less expensive dupes on their videos, but that goes against the whole mission and purpose of Cadence.

“Honestly, I don’t think sustainability actually matters enough for Gen Z to spend money on it,” says Meskers.

In a McKinsey survey, when asked, “When purchasing a product or a brand, how important are the following factors that may be attributed

@keepyourcadence



to the product or brand,” around 42% of Gen Z said, “Health and the environment” is very important, compared to around 53% of Millennials.

So, it’s important, but for most consumers, it’s not the #1 driver or main driver of a purchasing decision.

It’s more of a bonus. “A cool product that’s priced well and that’s sustainable. That’s the secret,” says **Lisa Guerrero**, cofounder of **Experiment**.

Despite their commitment to sustainability, Gen Z can’t resist fast fashion.

Amazon, among **SHEIN** and **Princess Polly**, were a few of Gen Z’s favorite retailers, per **a survey of 7,000 teenagers** by Piper Sandler. According to **ThredUp’s fast-fashion report**, one in three Gen Z shoppers feel like they’re addicted to fast fashion.

In an **interview with Morning Brew**, Gen Z investor, **Meagan Loyst**, said, “I would argue that most Gen Zers don’t purchase things solely because they’re sustainable. Shein is a great example of that...Shein hauls have [more than] 5.1 billion views on TikTok, and a majority of their users are Gen Z...The assumption that Gen Z is buying things just because they’re sustainable and good for the world is just a misconception because there’s a bunch of factors that go into the buying decision at the end of the day.”

Annelise Hillmann, cofounder of **Frontman**, a men’s grooming brand, knows that even though their team deeply cares about sustainability, Frontman’s audience doesn’t care (at least not as much as they do).

Function always comes first in their messaging. Sustainability is a secondary point. “Including sustainability in our messaging is more for our conscience than for the consumer. All men really care about price and function,” notes Hillmann.

“At the end of the day, sustainability is a cherry on top for a lot of people. It’s all about if the product works and if it fits into their budget. Then, they want to know if it’s sustainable,” adds **Sabrina Sadeghian**.

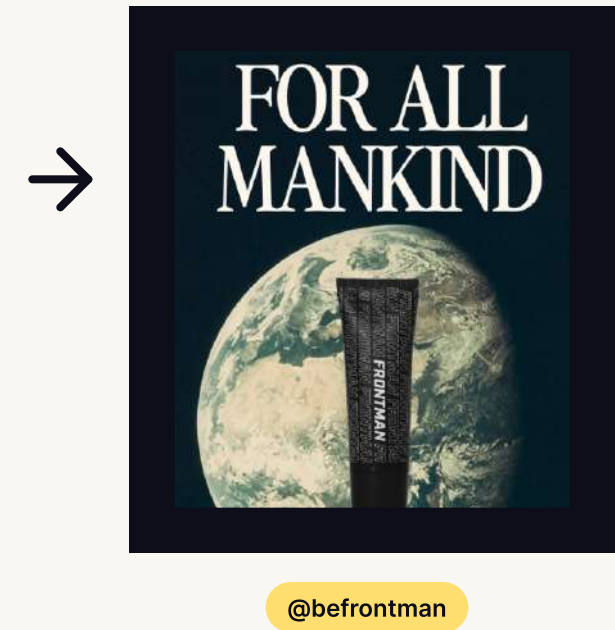
Even though **Experiment’s Avant Guard** mask creates 93% fewer carbon emissions than a standard, single-use sheet mask, Cofounder Lisa Guerrero knows it simply checks a box for the brand. “I don’t think it’s the reason people buy Avant Guard. I used to think that. We ended up taking sustainability off one of our site pages in favor of other content,” notes Guerrero.

Similarly, Jonah Reider decreased the size and prominence of Pzaz’s sustainability section after discovering that it significantly messed with conversion.

While many brands lean on function for their messaging and product positioning, we recognize that there are Gen Z-focused brands who have found great success in using sustainability as a differentiator.

August is one. The first line of copy on their home page reads, “Sustainable period care that actually works.” Consumers come for the product’s efficacy and absorbency, but they stay for sustainability and education, says **Nadya Eddy**, content director.

“I guess the assumption is that if it’s more sustainable, the product probably sucks, doesn’t work, and is more expensive,” says Eddy. “But,



@sheinofficial

Why has sustainability worked so well for August in comparison to other brands? In addition to fair pricing, free shipping for subscriptions, and the brand's decision to cover the tampon taxes in states that categorize menstrual products as luxury goods, August has doubled down on education—a **sustainability episode on their podcast “The Period Feels”** to TikToks about **compostability** and **plastic-free swaps**, to name a few examples.

Parade has taken sustainability one step further. Not only is the product sustainable—their underwear is made from 80-95% recycled materials—but they're also holding consumers accountable for their actions. In January 2022, they launched **Second Life**, a program created in partnership with TerraCycle where consumers can recycle any pair of underwear. Parade is asking a key question (that so many brands have left unanswered): How can we get consumers to think about using the product a year after they've purchased it?

As Parade Cofounder **Cami Téllez** put it in a **Glossy interview**, “It was really important for us to answer the question the customer always had, which was, ‘What do I do with my underwear when I'm done?’ It was critical to address the full lifecycle, especially as we're making a product that the customer is wearing every single day.”

That's a selling point for consumers—maybe not the selling point but it impacts loyalty, retention, and LTV. “Every sort of point that you have with [Parade] feels authentic to me. They use recycled fabrics—that's not why I buy, but I do love that I know when I'm buying from Parade, that there's some type of social impact and cause behind it. I know that a percentage of my purchase is going towards **Planned Parenthood**. I love that they stand for things,” added **Loyst**.

A sustainable-first approach helped **Drew Lederman**, CEO and founder of **Resist Nutrition**, enter a few key retailers and earn press. “We're getting into markets that no other protein bars are in because we can be in the zero-waste groups,” states Lederman. “We've gotten on blogs because we're the only brand leaning so hard into sustainability. We even found out that we're the only American-based protein bar with compostable film because we ship it from Europe.”

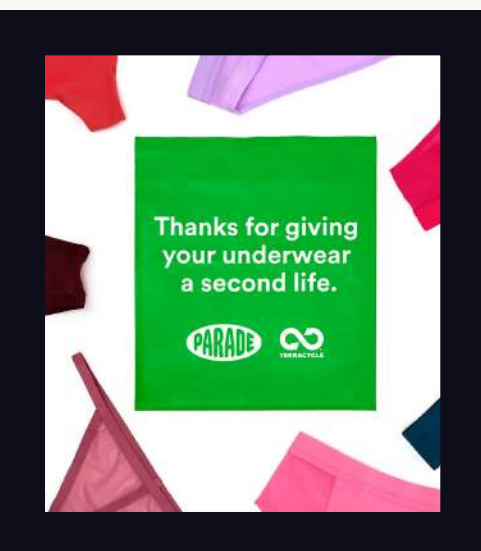
But, sustainability isn't a necessity for Gen Z brands.

We all know **Studs** as the Gen Z fan favorite. Founded by Lisa Bubbers and Anna Harman, the brand aims to modernize the piercing experience for Gen Zers. Bye, bye, Claire's. Hello, **earscaping**.

To be blunt, nothing about the brand is sustainable.

According to **Jenn Lee**, the brand's social media manager, she's never received a DM about sustainability in the year and a half she's worked there. More often than not, customers ask about the quality of the jewelry, its durability, and if it's safe for sensitive ears. The brand stays true to its values of self-expression and **ear(ducation)**, not doing good for the planet.

All things considered, Gen Z is a ball of contradictions.



@parade



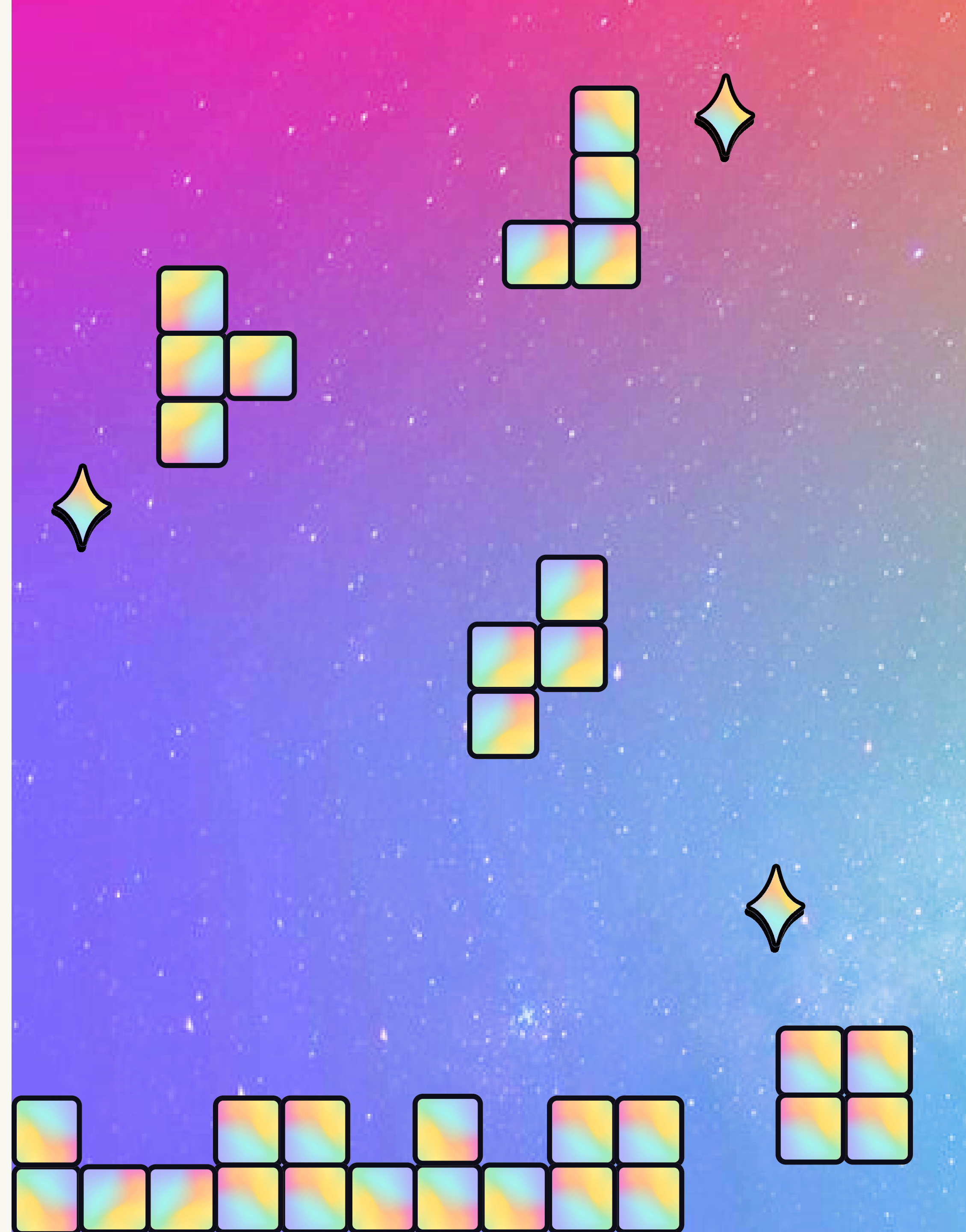
@studs



They're passionate about fighting climate change, yet they love a \$25 pair of jeans from H&M. They're imperfect, just like the rest of us. One day they're using Stasher bags, the next day they're recording a SHEIN TikTok haul.

Gen Z can't be put in a box.

A unique look and feel matters. But more importantly, a functional product that works matters even more (more than you think).



“I guess I wouldn’t necessarily call myself a vibes enthusiast, I think products have to have visuals. But, it’s so much more about function for Gen Z. Does the thing fking work? Does it fill a functional need?”**

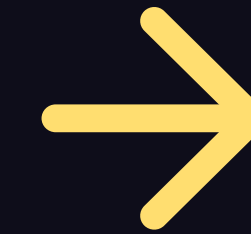


Jonah Reider
Founder, **Pzaz**

THEME 02



DATA



53% OF TEENS

**SURVEYED SAY AMAZON IS THEIR
TOP SHOPPING SITE** (PIPER SANDLER)

62% OF GEN Z

**AND MILLENNIALS SAY THEY LOOK FOR AN ITEM
SECONDHAND BEFORE PURCHASING IT NEW**
(GLOBALDATA CONSUMER SURVEY)

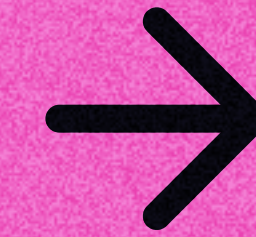
**1 IN 2 COLLEGE
STUDENTS**

**WATCH FAST FASHION HAULS ON
SOCIAL MEDIA WEEKLY OR MORE**
(THREDUP'S FAST FASHION REPORT)

**51% OF COLLEGE
STUDENTS**

**SAY THEY WANT TO QUIT FAST
FASHION OR SHOP IT LESS**
(GLOBALDATA 2022 CONSUMER SURVEY)

3. Ur community = Ur influencers



You bet

Delivered

Ur community = ur influencers

Community-first FTW



Influencer rates are on the rise, and they're still rising. From 2021 to 2022, influencer rates increased by 45%, on average, per influencer agency, **The Motherhood**. While influencers are recognizing their worth (and rightfully so), there's an influx of new creators—thanks to TikTok, YouTube, Clubhouse, Stripe, Swaypay, Stir, and more tools. **Stripe** found that around 680,000 creators have been onboarded across 50 platforms from 2012-2021.

Digital natives, Gen Z has learned how to leverage these platforms to build their brands and earn multiple streams of income. Cha-ching, cha-ching! More than one-third of Zoomers consider themselves digital creators (**Coefficient Capital**).

To reach Gen Z, brands have to exist and thrive on these channels, especially on TikTok. And as influencer prices continue to increase, more and more Gen Z brands are tapping into their unique communities for content creation, UGC, and product development/feedback.

“When we think about the creator economy at Parade, we see anyone as having influence,” explains **Dev Bowman**, community growth manager at **Parade**. Parade, amongst other Gen Z-focused brands, is leaning on its day one fans and community members to grow and reach new customers. That's how they reached such massive scale.

Anyone and everyone can be an influencer.

In its early days, Parade gifted its underwear to every cool kid with an Instagram account, ideally in exchange for social posts. The brand offered free product over IG messaging to **6,000+ people in their first year.**

Now, the brand has a community of 10K+ ambassadors, known as **Parade Friends.** From free samples to community events, these brand advocates even play a role in developing the next generation of Parade products.

Cofounder **Cami Téllez** called it “inspired co-creation” (**ELLE**). In June 2022, Parade launched its first “gender-expansive” collection. For the launch, Bowman and the community team leaned on the brand’s day one fans who identify as gender-queer. Bowman says, “I told them, ‘Whether your code has been used or not, this launch might mean something to you, so we want to send you a pair.’ Reaching out as a real human—without looking at their historical influence—is key.”

Interestingly, Parade doesn’t provide scripts for content. The team finds that the best content surfaces when community members have the freedom to be creative—and that includes Parade posts that have nothing to do with underwear.

“Working with micro-influencers is part of our DNA,” Téllez said in an NYTimes interview. “Unlike brands of underwear past, we don’t think you need to have hundreds of thousands of followers or be a supermodel to share your underwear story.”

This approach—leaning into your community—can also be an effective acquisition tool.

Seeding product to community members can result in a cheaper CAC than running paid ads. Even if a random customer makes one sale, a friend might see their content and tell their friends about your brand.

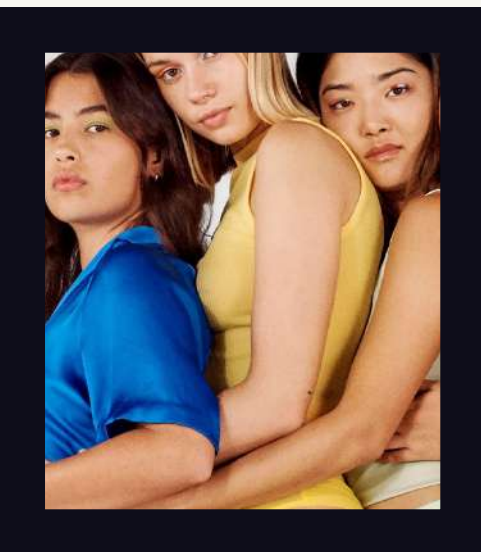
For the **4AM Skin** team, they’ve stayed lean by leveraging existing friendships for content. “The people who love the brand are people who have existing relationships with Jade and me. It’s helped us stay super low budget on influencer stuff and not shell out big checks,” says **Sabrina Sadeghian.**

As the influencer economy rapidly shifts, brands are raising the bar while influencers are raising prices.

The stakes are only getting higher for creators. “If I pay someone \$5-10K for a post, I’m expecting a higher ROI,” says **Lisa Guerrero,** cofounder of **Experiment.**

Brands, including Experiment, are thinking even more strategically about influencer segmentation. “As a brand owner, I’m looking at not just engagement by numbers but who captivates and holds attention. Numbers don’t always tell the full story on TikTok,” she explains.

TikTok has changed the game for creators and brands alike. The platform is rooted in authenticity over performance; therefore, content can easily flop just as it can easily go viral. “On TikTok, content needs to be useful. If it’s an ad, it needs to be funny or teach you something, not just show a pretty product. It has to do something for you,” says Sadeghian.



@parade

So, if you're ready to leverage your community as influencers, how do you build that community, and what does that community look like? What's the go-to community platform for Gen Z?

August, the sustainable, menstrual-care brand remaining the period experience to be empowering and inclusive, first started as a community. Today, the brand has about 4,000+ community members. They're all a part of the "**Inner Cycle**," August's **Geneva community**.

Before using Geneva, the August team tried a Facebook group. They hated it. They tried Discord. It didn't feel cozy. The team describes Geneva as a "cozy Discord," focused on meaningful brand conversations, not follower count or likes.

Alexa von Tobel, managing partner at Inspired Capital and seed investor in Geneva, said the platform "sits at the nexus of what communities — driven by creators and Gen Z — are looking for" (**Insider**).

How does August harness Geneva to build their community? Before major product launches, August sends free samples to 30 randomly-selected community members to source feedback. Sometimes, the brand will contract community members as UGC creators, and other times, they'll host IRL community meetups.

August also invites thought leaders, experts, and doctors to join

Geneva chat rooms. Plus, they partner with other mission-built, value-aligned brands to offer their community members exclusive discounts, such as **Cocokind**.

"Gen Z loves that they can connect with our team and August on this level," notes **Nadya Eddy**, content director. "We all have our DMs open on Geneva. Nadya, our cofounder, is accessible there too. She hosts office hours where she'll help people with their resumes and stuff like that. It's cool that community members get to help build the brand as well."

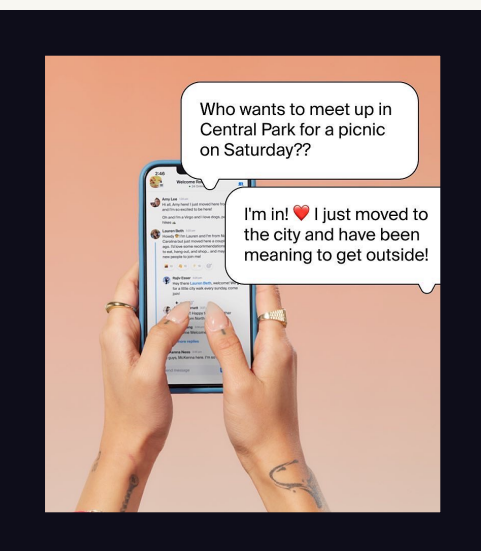
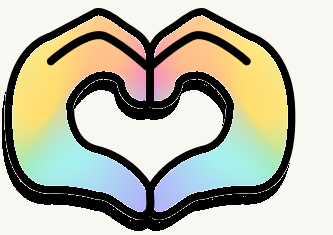
August's community has turned into its own kind of affiliate network.

Your community can also be an experimentation tool.

Other Gen Z-focused, DTC brands are building thriving communities on Geneva, including **Bubble**, the dermatologist-tested, vegan, youth skincare brand.

When **Shai Eisenman** first started Bubble, she conducted focus groups with 500+ teens. Then, she launched Bubble's Geneva community, which now has 4,000+ people.

In a **2020 Beauty Independent piece**, Eisenman said, "I spend probably about five hours a day on the app talking to them. They are a part of the brand. They help us make the decision on everything, our packaging, the talent we work with."



@geneva

“Feedback is definitely a huge undercurrent within the brand. We send a ton of product to our community for testing before launch. They’re even a part of the product testing for the lab,” adds **Emma Standing**, Bubble’s head of customer experience and ecommerce.

And, Gen Z always has an opinion. “The majority of Gen Z community members have a guttural reaction. They’ll tell you if they hate it. Gen Z likes to tell you exactly how they feel,” says Eddy.

Plus, a community-first approach is a smart marketing approach. It’s an opportunity to say, “Here’s the color our community picked. We made it happen.”

In addition to Geneva, brands are using drops to create FOMO and a sense of exclusivity.

From **Parade** to **Studs**, brands are leaning hard into drops. Their purpose? Build hype and create FOMO. This marketing technique isn’t anything new or groundbreaking in today’s day and age. Drop culture, popularized in the US by Supreme, has come a long way. Now, we’re seeing more and more DTC brands adopt this playbook—Parade, Studs, Minted NY, August, Hill House Home, and Madhappy. Plus, bigger brands are seeing value in it too—**Chipotle’s water cup candle** and **McDonald’s Kid Kudi t-shirt collab** are two recent examples. In addition to creating hype and exclusivity, it’s an effective way to understand demand, explore new product offerings, and build community.

Top community members are on top of each drop. They want to be where the action is at, and they want to be there first. At Studs, they build waitlists for new drops. They’ll tease new store locations or collections to their engaged audience and drive to piercing appointment sign-ups.

The **Frontman** team has been experimenting with the drop model. They launched six products in small batches to test demand. “That drop provided us with data for long-term product development. Now, we know what people want, and we can make that a part of our new offering in the long run,” notes Cofounder **Annelise Hillmann**.

The model applies to food & beverage as well. **Griffin Spolansky**, cofounder of **Mezcla**, produced a very limited quantity of a new flavor last fall and sold out within the first week and a half. “After they sold out, we had people asking us about the flavor for a month and a half. When it was back in stock, people got so excited about it that the bars sold out again. People still message us to this day about the flavor,” explains Spolansky.

The drop model works time and time again. It excites community members and general shoppers. It even entices shoppers to join brand communities as community members are often the first ones to hear about drops and gain exclusive access. You heard it here first.



@eatmezcla

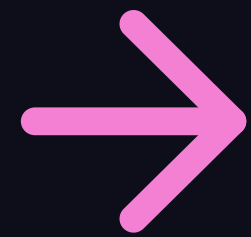
“There’s a certain element of looking at content creators as entrepreneurs and not just 18-year-olds with an iPhone.”



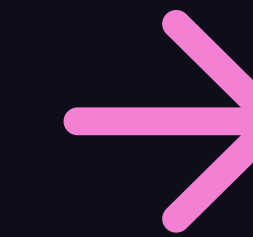
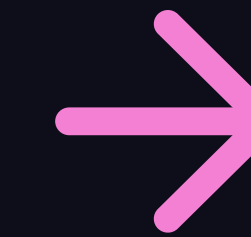
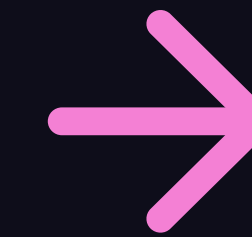
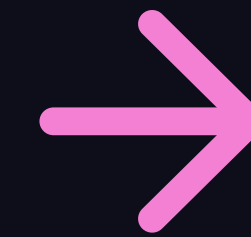
Dev Bowman

Community Growth Manager, **Parade**

THEME 03



DATA



→ 32% OF GEN ZERS SPEND 1-2 HOURS ON TIKTOK A DAY
(JOY VENTURES AND GETWIZER)

95% OF TEENS

(13-17) USE YOUTUBE, 67% USE
TIKTOK, AND 59% USE SNAPCHAT
(2022 PEW RESEARCH STUDY)

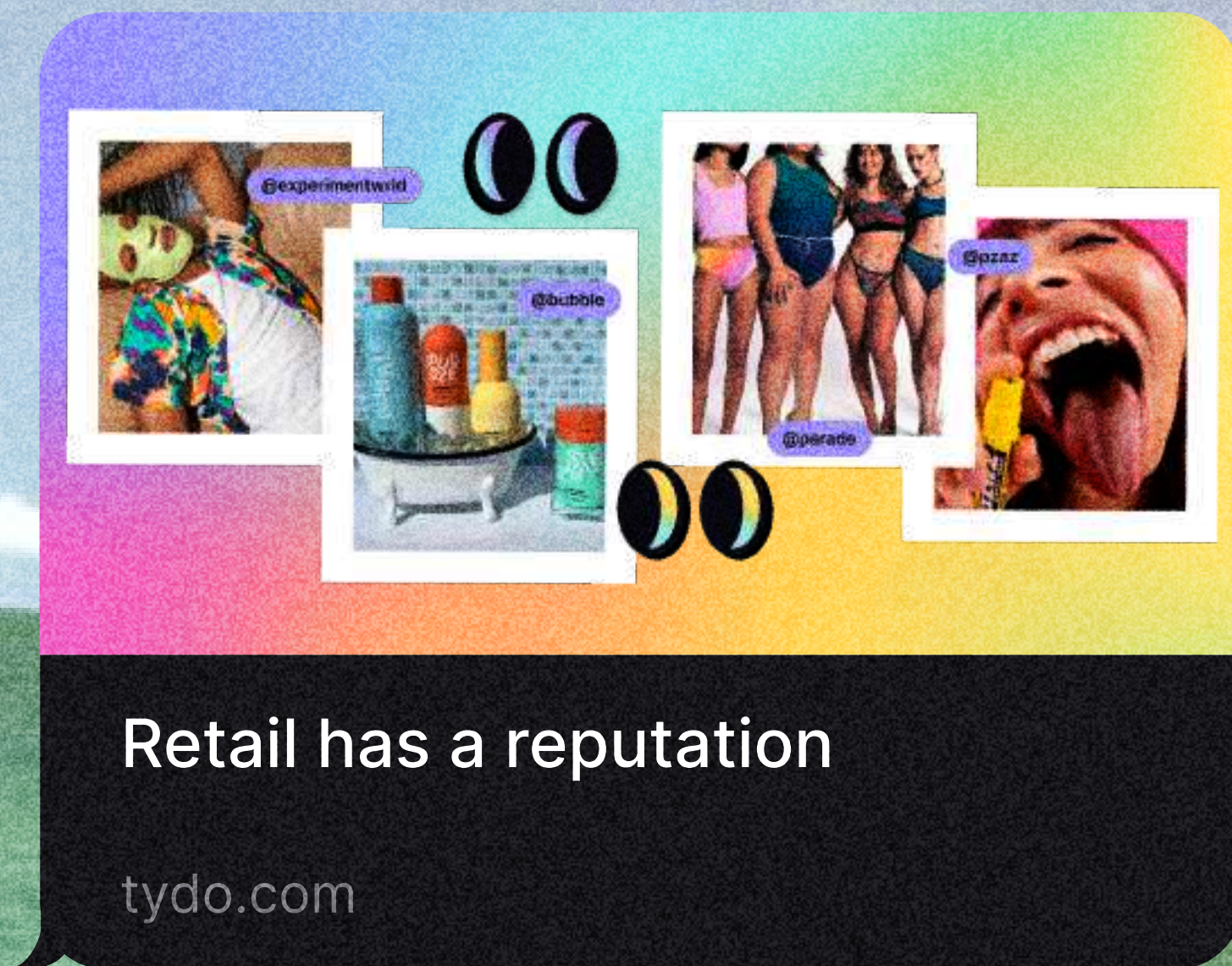
44% OF GEN Z

HAS MADE A PURCHASE DECISION
BASED ON A RECOMMENDATION FROM A
SOCIAL INFLUENCER, COMPARED WITH
26% OF THE GENERAL POPULATION
(KANTAR WITH MOBILE MARKETER)

TIK TOK

IS ON TRACK TO OVERTAKE FACEBOOK IN TERMS OF
INFLUENCER MARKETING SPEND THIS YEAR AND WILL
OVERTAKE YOUTUBE BY 2024 (INSIDER INTELLIGENCE)

← ← ← 4. Retail has a reputation



Delivered

Retail has a reputation

Brands turn the table on retail



E Every founder dreams of seeing their product come to life on the shelf—whether that’s in Whole Foods, Target, Urban Outfitters, Erewhon, or Costco. But, making it to the aisle is only half the battle. The other half? Dealing with retailer shenanigans (plus, doing the hard work to get your product to fly off the shelf).

Urban—the Gen Z hotspot— isn’t as cool as it looks. The retailer is elusive, to say the least, per a few Gen Z founders.

Science-backed beauty brand **Experiment** will be launching in Urban Outfitters this fall. Although the brand technically falls under the gender-neutral and sustainable skincare categories, it was merchandised for men. When the team asked Urban for a reason, Cofounder **Lisa Guerrero** said, “Urban told us that it’s for this whole thing they’re doing and that they’re going to keep it under men.”

Guerrera thought about turning down the retailer until a senior buyer mentioned that the brand would be getting a whole display. The only issue: “They haven’t given us any info on where the display is going to be, what it’s going to look like, and what we need to prepare,” notes Guerrero.

“Urban has been so challenging. It’s obscenely top down,” adds **Jonah Reider**, founder of **Pzaz**. Don’t get him wrong, he’s thrilled to be in Urban, especially since the retailer doesn’t typically sell consumables. Plus, Urban picked up Pzaz before their official launch.

“Urban very much underscores our narrative of reimagining energy as a very expressive accessory,” states Reider. “But, it’s been atrocious for us in the sense that it’s incredibly challenging to speak to a buyer.”

Urban is playing the “I’m too cool for you” card.

“Urban underscores our narrative of reimagining energy as a very expressive accessory,” adds Jonah Reider, founder of Pzaz. Reider is thrilled to be in Urban, especially since the retailer doesn’t typically sell consumables. So, it’s a big deal. Plus, Urban picked up Pzaz before their official launch.

“But, it’s difficult in the sense that it can be challenging to speak to a buyer or receive detailed sales updates,” he adds.

Brand teams need to be ready to put their all behind retail partnerships.

Bubble exclusively launched in Walmart in 2021, and in July, they launched in CVS.

Committed to reaching America’s teens, Bubble’s retail launch in Walmart furthered product accessibility. In an interview with the retailer, Founder Shai Eisenman said, “We’ve known since launch that buying online is a challenge for people, whether they didn’t have their own credit card or because their parents didn’t trust an online-only brand they hadn’t heard of. Being in Walmart stores really makes the product more inclusive and accessible.” They’re meeting their customer where they are.

At the same time, it’s been a major commitment for Bubble’s small team—in terms of time, effort, and the actual product. “Retail can be a really daunting place for small brands. You gotta feel ready when you do it,” says Emma Standing, head of customer experience and ecommerce at Bubble.

Entering retail has been an immense learning opportunity for Standing. She’s learned how to pivot and help make the brand shine outside of the site and the brand itself.

“We’ve had to start thinking a lot more thoughtfully about how to balance our marketing efforts while simultaneously lifting retail messaging and strategies,” she says. And, that’s no easy lift—one that teams might not be aware of as they start to navigate the retail world.

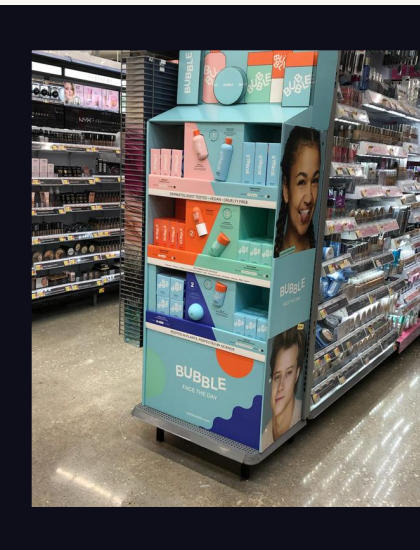
“I’ve seen a lot of brands rush into retail, not realizing how much of their own time and resources go into making the partnership happen and be successful,” states Standing. “Our whole team—no matter what department or specialty—is heavily involved in making these partnerships happen.”

Know what you’re getting into. She adds, “The brand’s team needs to be confident that they can provide a substantial lift on their end before taking on a major retail relationship. It’s super rewarding, but it definitely takes a lot of work.”

Interestingly, Nadya Eddy, content director at August, has noticed that more and more retailers are asking more and more of brand teams, especially content. When August launched on Foxtrot, the retailer asked the August



@urbanoutfitters



Source

team for content. “Maybe it’s because Nadya is a built-in influencer, but more retailers have certain deliverables, such as content, otherwise they won’t buy,” says Eddy.

“Content is a huge part of the deal, especially if the retailer doesn’t have a strong presence on Instagram or TikTok.”

What unique opportunities do brick-and-mortar stores present for Gen Z, DTC brands?

Parade launched its first brick-and-mortar store in December 2021. Parade Cofounder **Cami Téllez** wanted to bring Parade to life and create a safe space for the community. It’s less of a “retail play” and more of a “clubhouse vibe,” as **Dev Bowman**, community growth manager, puts it. Plus, it’s an opportunity for people to go and touch the product.

In a **Nylon interview**, Téllez explained the IRL experience as “the next dimension of Parade where [their] community can color outside the lines with [them].”

Téllez adds that the next chapter of retail is “about the entire experience the brand is manifesting in the physical realm. Our intention was to offer a space

where our community can gather, connect, and have a haven to freely express themselves in. We also plan to have ongoing events at the store.”

For **Studs**, it’s not necessarily about building community but rather creating virality as well as driving growth. The brand has 10+ stores across New York City, Miami, Seattle, Boston, Los Angeles, Boston, and more US cities.

“Most of our virality comes from our Studs stores,” explains Jenn Lee, head of social media at the brand. “Our earrings are cute, but everyone posts about the store and the experience. The design is cool. Our employees are welcoming. The whole point is that everyone is welcome, and everyone can get their ears pierced in a comfortable, safe environment.”

The store is ripe for UGC. Cofounder **Lisa Bubbers** added, “They’re highly Instagrammable. Piercing itself, as an act, is very Instagrammable; you really want to tell the world and your friends what you just did. So we have a lot of UGC in-store. And for at-home ‘earscaping,’ our packaging is very Instagrammable. We have really cute neon Studs pouches, we have a scratch-off in every e-commerce order — you can scratch off to win. One of the prizes is a \$500 shopping spree, or [you could win] a tote or a discount code. And so we have moments and stickers. And also showing your

earscape as part of your outfit at home is really popular. So we really see you UGC across the board; that goes for both ends of escaping — both piercing and the fashion assortment.”

Plus, brick-and-mortar plays a pivotal role in their business model. In a **Glossy interview**, Studs Cofounder **Anna Harman** said, “Stores are the key business driver for Studs. They are very economically viable; they are not just a marketing activation. The business wouldn’t function without the stores...And then in terms of how they will work as a marketing tool for Studs, the biggest thing we see is that where we put Studs stores, we get bumps in our e-commerce revenue — which is not unique to us; all physical businesses frequently see that. But we are definitely experiencing that, which is proving to us that, as the store business grows, the e-commerce business will grow in tandem.”



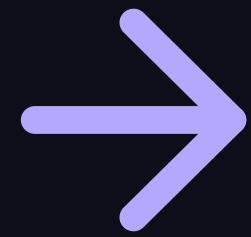
“You can’t just drop your products on the shelves and walk away. Brand founders and their teams are key in making their items stand out and be successful in retail.”



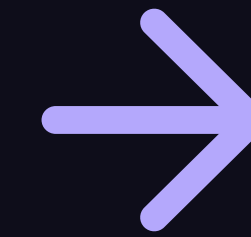
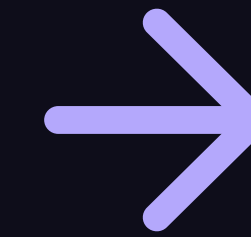
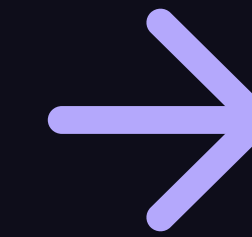
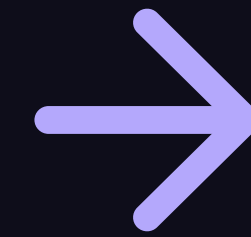
Emma Standing

Head of Customer Experience and
Ecommerce, **Bubble**

THEME 04



DATA



WHEN ASKED, "WHAT MADE YOU STOP PURCHASING FROM THE RETAILER?"

23% OF GEN Z

SAID POOR STORE EXPERIENCE, THE HIGHEST OF ANY GENERATION. (SALESFORCE RESEARCH, APRIL 2022)

→ 73% OF GEN Z

RESPONDENTS SAID THEY USE IN-STORE FOR DISCOVERING PRODUCTS
KEARNEY'S FUTURE CONSUMER REPORT)

65% OF GEN Z

ENJOY IN-STORE FOR TRIAL
KEARNEY'S FUTURE CONSUMER REPORT)

81% OF GEN Z

LIKE TO PURCHASE IN-STORE
KEARNEY'S FUTURE CONSUMER REPORT)

→ 98% OF GEN Z

SHOPPERS SAID THEY USUALLY MAKE PURCHASES IN A BRICK-AND-MORTAR STORE SOME OR MOST OF THE TIME (IBM)

5. The end goal? Exit. → → → →



The end game? Exit.

tydo.com

Up up and away 🚀

The end game? Exit.

Lessons learned and future plans 🙄



Raising venture dollars hasn't gotten any easier for DTC brands. Inflation, a potential recession, and an ecommerce slowdown aren't working in their favor.

The **Frontman** team closed a **\$1.2 million seed round** in January 2022. As they explored fundraising this summer, they struggled to know whether or not angels are writing checks, or they're just saying that. **Zehra Naqvi**, senior investment associate at **Republic**, has seen some term sheets pulled here and there, but she notes that funds are still excited and are actively investing.

Given the current climate, the Gen Z founders at the table shared their best practices and perspective on raising venture dollars.

The numbers always matter. But, so does the vision too.

In addition to crowdfunding, protein bar brand **Mezcla** raised a pre-seed round, per **Crunchbase**. From his fundraising experience, Cofounder **Griffin Spolansky** notes that revenue and cash flow are critical, and so is retention when talking to investors. Plus, investors care about the blue sky ideas.

It's easy to get lost in the numbers, especially as an early-stage consumer brand, but Spolansky finds that investors get most excited about investing when they hear about the larger vision.

"They need to be excited about the product and where you're heading. That's when they invest," notes Spolansky.

Lisa Guerrero, cofounder of **Experiment**, agrees. “You know you’ve kind of lost them when they’re busy searching through the numbers,” she says. When she first started the science-backed beauty brand, she overcomplicated the vision. Then, she shifted her pitch and started focusing on how Experiment makes science cool. Soon after, investors hopped on board.

“That kind of black and white simplification helped them see the broader vision for how we’re changing the entire medicine cabinet. We’re splashing color over it. So, I think it’s about simplifying your blue sky vision as much as possible,” adds Guerrero.

One of Experiment’s lead investors encouraged Guerrero to think even bigger, even crazier. What’s the blue sky idea? If everything were to go right, what would that look like?

Now, let’s turn the tables for a second. Gen Z founders aren’t accepting any and every investment.

They’re looking to diversify their cap table—searching for investors who reflect their values, who believe in their vision, and who bring new perspectives or insights.

Lisa Guerrero, as well as other Gen Z founders, has found value in adding creators to Experiment’s cap table. **Liah Yoo**, founder of **KraveBeauty** and creator with over 1.2M YouTube subscribers, invested in Experiment. It was Yoo’s **first investment** as part of her new venture fund, **Press Reset Ventures**.

Yoo isn’t the only content creator actively investing in brands. TikTok stars Josh Richards, Griffin Johnson, and Noah Beck banded together to launch **Animal Capital**, a new VC fund. **Night Media** built its venture fund, backed by MrBeast, Matt Stonie, ZHC, and more creators on their roster. Even the D’Amelio family launched their fund, **444 Capital**.

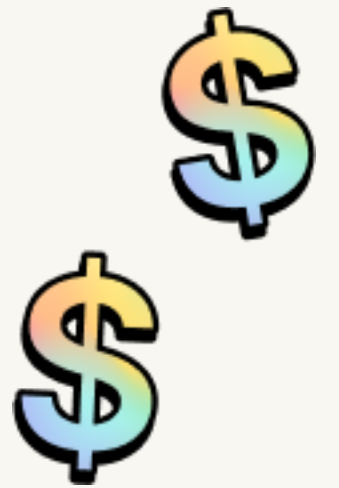
Right now, Guerrero is the only founder at Tydo Tables with a creator on her cap table, but she’s eager to add another. And, for the other founders? Well, they’d gladly take a check from a content creator any day.

Although fundraising can be a struggle, press has helped Gen Z founders in the immediate term in some aspects.

Press has been useful as Gen Z brands continue to fundraise, manage investor relationships, and seek out general visibility; it hasn’t necessarily impacted sales. For **August**, press primarily helps with investors, notes **Nadya Eddy**. Even if it’s a small press mention, investors will text the team congratulating them on the feature.

Investors discovered Experiment through their Thingtesting drop (**Thingdrop**). And, Urban discovered the brand through **CPGD.XYZ**.

Not every press opportunity yields the same results. **Bubble** was recently featured on Good Morning America, and the inclusion lifted the brand from a visibility standpoint over anything else, notes **Emma Standing**, head of customer experience and ecommerce at Bubble.





What are the biggest lessons they've learned from their predecessors?

It's all about the exit. "Sell to Estée Lauder when you can. That's what Glossier taught us," says **Sabrina Sadeghian**, cofounder of **4AM Skin**. "You want your brand to keep growing, but you have to be realistic. If you have that high and you have a great offer in front of you, I would maybe take it."

Sure, a legacy brand is appealing, but so is a big check.

But, it can take 10, 15, or 20 years to see an exit. Most people don't realize how long some brands have been around. Take **ILIA Beauty**. Founded in 2011, the clean makeup brand raised \$14.5 million in funding over two rounds. 11 years later...In February 2022, they were acquired by the Courtin-Clarins family holden company. Or, look at the **recent acquisition of Clif Bar** by Mondelez International. The brand was founded in 1992 and was only just acquired—30 years later—for \$2.9 billion.

However, there's no real rush.

"I used to think that I wanted to build the next Estée Lauder, the next legacy company. Now that I look at it, I'm also young and I like building and creating things," says Guerrero. "Experiment is awesome. It's not going to take three years. It'll probably take longer than that, but I don't know if I want to be an exec at a conglomerate. I'm happy to sell it later. I'm not trying to sell it now."



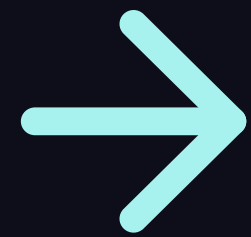
**“Exit. Exit
on a high.”**



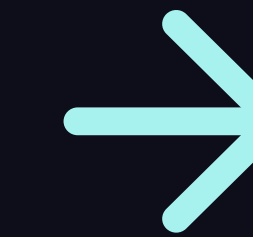
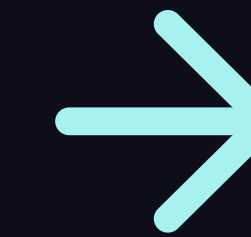
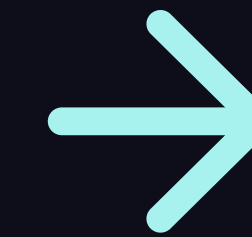
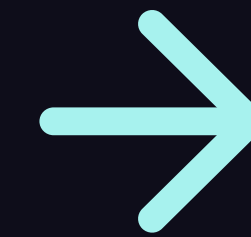
**Sabrina
Sadeghian**

Founder & CEO, 4AM Skin

THEME 05



DATA



68% OF GEN-ZERS

AND 72% OF MILLENNIALS SAY THEIR FINANCIAL STRESS HAS GROWN IN THE FACE OF CURRENT EVENTS (PWC)

2022 IS PROJECTED TO HAVE

17% MORE M&A

ACTIVITY COMPARED TO LAST YEAR

(CB INSIGHTS VIA MODERN RETAIL)

THE AVERAGE RESPONDENT BETWEEN THE AGES OF

18 AND 25

IS SEEKING A \$171,633 ANNUAL SALARY TO STAY AFLOAT

(PERSONAL CAPITAL SURVEY, CONDUCTED BY THE HARRIS POLL)

The Last Course

Gen Z: A little bit of this and a little bit of that

Gen Z might be the most diverse generation. It might be the most entrepreneurial. It might be the most authentic, community-focused, and values-driven. But, it's also a generation full of contradictions.

In this report, we've learned that a vibe can make or break a brand. Gen Z wants a unique look and feel, but then if the product doesn't work, it's see ya l8ter, alligator. This generation is full of DePop girlies, passionate about secondhand shopping, yet Gen Zers can't resist a sub-\$20 dress from SHEIN.

Nostalgia—especially for the '90s and early aughts—is key. You'll never catch a Gen Zer in skinny jeans. Baggy jeans, a grunge look, and platform Docs—that's the look. Middle parts are in, side parts are out. Yet, we live in an age of never-ending newness—new content, new technology, new brands. Society is advancing at an exponential rate; however, Gen Z longs for simpler and older times.

Digital natives, Gen Z is separating themselves from an ever-present, perfectionist, highly-performative life online—more and more. Goodbye curated Instagram posts, hello BeReal.

This report explored these contradictions as well as the unique ways brands are communicating with and targeting Gen Z. To put it simply, it's no easy feat to reach this audience of consumers. Gen Z is still, in many ways, undefined...or maybe every generation is to some extent. But, this generation, in particular, is more expressive and nuanced than ever before. As you can see, Gen Z brands all have a unique approach and vibe, but the throughline is authenticity and humanness. Be real. Be true.

Thank you to all the incredible founders and operators who participated in the conversation. And, thank you to all of you for reading and following along. We hope you walk away with thought-provoking questions, new ideas, and conversation starters.

Tydo Tables doesn't stop here.

The insights gained from this conversation will live here as well as in Tydo Tables content to come. We hope to have you as part of future Tydo Tables experiences—whether it's a seat at the table or as a long-time reader of our content.

Check out our first Tydo Tables experience, featuring Austin-based CPG founders and operators [here](#). And for more content from the Tydo team, head to [The Pulse](#).

