



THE BRAND

yearbook

2022

And so it begins...

Welcome to the inaugural edition of The Brand Yearbook. This is the totally subjective (yet deeply considered) product of our joint preoccupation with Gen Z and the ways we believe brands can best serve their tastes, motivations, and obsessions.

While we aren't Zs ourselves, we are digital obsessives with backgrounds in editorial content, digital commerce, consumer product and social platforms who spend inordinate amounts of time talking to our Gen Z brain trust and consuming as much information as possible about the generation roughly defined as those born after 1997 who will represent 60% of US consumers by 2025.

In these pages, you'll meet the **Class of 2022**: the brands we believe connected with Gen Z last year, capturing their attention and purse strings, and the ones we think have the biggest opportunity to do so, either due to their market dominance or some other unfair advantage. We also dive into the playbooks they're leveraging—or the ones we think they could implement to stay on course with Zs, and perhaps even future-proof their organizations.

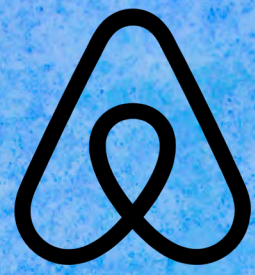
Here, you'll find recurring themes: creator-driven everything, out-of-the-box collaborations, the drop model, reverse-engineering virality, and nostalgia-as-a-service, plus threads borne of the cultural shifts shaping Gen Z, such as the rise of nomadic living, the waning taste for #hustle culture, and explosion of niche fan communities.

We hope you enjoy this masterclass in marketing, making, and re-making culture in the image of Gen Z.

—Sara Wilson & Michelle Goad

Class of 2022





airbnb

*Most likely to build a million-dollar business
from a remote Greek island*

After the challenges of the pandemic, this brand has emerged triumphant by embracing the cultural shifts borne of long-term remote everything. No generation is more attuned to this than Zs, many of whom have already embraced the roaming-the-globe-as-you-please lifestyle (the #nomadlife hashtag has 318M views on TikTok). What's more, by overhauling the platform to prioritize discovery of accommodations with wow factor, it did what Pinterest has been trying unsuccessfully to do for eons: merge travel discovery and booking on one platform.

What we hope happens next:

Airbnb becomes the go-to platform for the global community of digital nomads, which is estimated to be

over 35M Americans by 2025. This will extend beyond simply offering long stays and move into becoming a source of support, information, and community, edging in on the territory of current destinations like Nomad List. We're also anticipating the company making a deeper investment in brand storytelling via partnerships to help Gen Z dream bigger for their next remote work destinations. Think a TikTok reality show starring nomadic creators shot inside a dope Airbnb in an insane location. Or *Architectural Digest* tours that take viewers inside mind-blowing Airbnbs instead of celebrity homes (because anything aspirational is much better served to Zs with a side of accessible).



Most likely to learn to socialize (finally)

Amazon is the #1 place teens shop, according to the latest Piper Jaffray Gen Z survey. That top spot is especially impressive since the platform makes almost no investment in brand marketing, nor does it have distinctive social content of its own—two things considered non-negotiable for Zs. But as apps from the East look to take a piece of the commerce behemoth's market share, it had better be thinking about both (may we suggest starting with a YouTube channel to stream flying drone deliveries?).

What we hope happens next:

We're only witnessing the tip of the iceberg when it comes to the role social commerce plays in our lives. Not one to miss an opportunity, Amazon jumped into the social discovery game with Inspire, a personalized TikTok-esque in-app feed that launched in late 2022. While the platform has long crushed the affiliate game (which has arguably been its most impactful lever in driving its popularity among Zs), this type of social product is new territory for Amazon. As such, the platform can't expect to simply turn on the faucet of influencer content and watch the sales role in. But if it *can* master this pivot to social media, it'll be able to swat a way competition for years to come.



Cash App

Most likely to be your personal CFO

What was once one of the unsexiest categories in the consumer app world—P2P fintech—is unsexy no longer, thanks to this supernova which has become a fixture on the homescreens of Zs everywhere. How'd it come to dominate the landscape (and hip-hop lyrics)? First, by integrating super-sticky social features designed to drive network effects into the product (such as \$Cashtags, the platform's answer to hashtags). And then by aligning with culture makers, particularly those in the Black community in which the app first gained traction (the brand has partnered with superstars like Kendrick Lamar for financial literacy content, Megan Thee Stallion for a stock giveaway, LaQuan Smith for a capsule collection, and launched Cash App Studios to nurture rising talent).

Cash App has even brought the thrill of sneaker customization to banking with its debit card. (Amex and Visa don't let users trick out their cards with customized emojis—yet.)

What we hope happens next:

The company launches a social impact arm to raise awareness about the issues at the heart of the economic disparities that primarily affect minorities, from unfair mortgage practices to predatory lending to cash bail. It's the least we could expect from a company poised to become the Ant Group of the West.



Most responsible for giving the burrito a glow-up

Moving at the speed of culture is easier said than done (read: most brands struggle to do it well). Restaurant chain Chipotle is the consistent exception, and as such, its cred with Zs has never been stronger. The brand's obsessive focus on social listening and culture-hunting has sparked some of the most creative and organically viral brand moments ever, like 2022's Corn Kid collab video. Chipotle isn't afraid to experiment with new platforms—in fact, it embraces them (case in point: launching a collection made from avocado pits on Z-favorite resale platform Depop or hosting a job fair on Discord). The brand turns out viral products that deliver value in the form of surprise-and-delight moments to an already highly engaged, scaled community of superfans (one

standout drop from 2022 included a limited-edition candle—an arch nod to customers who “accidentally” avail themselves of the restaurant's lemonade).

What we hope happens next:

The brand's loyalty program, accessible through its mobile app, has 28 million members—nearly three times the size of *The New York Times*' subscriber base. Throw in more of that sharp consumer strategic thinking, and they could become the next great loyalty-driven media company.



Coca-Cola

Most likely to drive the next big beverage moment

We're calling it: beverages have replaced fashion as the new social platform flex. With a surge of new buzzy beverage brands and personalized concoctions to drink on the go, showing off one's drink of choice online telegraphs identity as much as showing off a new on-trend fit (and at a much lower price point). The dozens of creator-led brands that flooded the market in 2022 understood this instinctively, such as Chamberlain Coffee, Juvee, and PRIME Hydration—all of which translated their creators' social media followings into extremely profitable sales. And let's not forget about beverage-led executions like Ralph's Coffee from Ralph Lauren, with its Blair Waldorf-approved Upper East Side outpost and Instagrammable trucks parked at tourist-friendly locations like Rock

Center. So, who would we expect to be all over this trend? The most iconic brand of all, of course: Coca-Cola. But so far, they've stayed relatively quiet. We're hopeful they're scheming for a big 2023 push.

What we hope happens next:

Coke's distribution, brand, and logistics chops power the next wave of brand and creator-driven beverage drops (imagine a Lululemon canned adaptogen-infused water or a Paul Rudd Fountain of Youth drink). Plus, the Coke-owned Minute Maid and Fruitopia brands come back, fueled by Gen Z's love of Y2K everything.



Corteiz

Most likely to make you climb a fence to score a hoodie

Community is perhaps the hottest buzzword in marketing today, but for the majority of brands, it's still a pipe dream. Not so for UK-based streetwear label Corteiz, which launched in 2017 as a buck against the corporatization of streetwear and the multi-billion-dollar resale industry which have watered down what was once a grassroots scene. The obsessive quality of its fan base recalls Supreme's early days. But unlike that brand, Corteiz is marketed only through social, its limited-run drops sold via a password-protected site. (Only the chosen few are granted access, with fans swapping intel on Discord and Reddit). The under-the-radar sensibility extends to its founder, known as Clint (a.k.a. CRTZ), who launched the brand from his bedroom and garnered early fans among

industry insiders including the late fashion icon Virgil Abloh. Corteiz adheres to its egalitarian values, which exist in opposition to the industry norm: everyone gets the same access (or lack thereof) to drops, resale is discouraged, and products are made to last.

What we hope happens next:

Other community-led, drop-centric apparel brands like Stocked and Minted NY get inspired by Corteiz's give-back initiatives, like the one in 2022 that incited frenzied crowds to descend on the streets of West London to snap up just 50 jackets.

Deuxmoi

Most likely to out-gossip Gossip Girl

What started as an anonymous fashion blog in the 2010s and blossomed in the early months of the pandemic to an Instagram account featuring fan-submitted blind items largely chronicling celebrity minutiae (sightings, on-set encounters, tipping habits) became a Gen Z answer to Us Weekly—only in real time, social and e-commerce-enabled, with multiple podcasts, a fictionalized memoir, newsletter, merch, sponsorship and affiliate deals, and an HBO Max show. Though it has garnered plenty of criticism for publishing unverified personal information (a disclaimer on the site screams that it “publishes rumors and conjecture, not facts”), its legions of fans don’t seem bothered

enough to stop reading. And while a reporter recently revealed the identity of the two founders, whomever is behind DeuxMoi has not confirmed this.

What we hope happens next:

In order to stay relevant with Zs, the brand partners with less exposed brands that have complementary fan bases, like OGBFF or Ian Charms. Maybe also take a page from the real Gossip Girl and set up a private community on Geneva where gossip can be exchanged in real time. For now, r/FauxMoi is the closest approximation.



Most likely to relocate to Silicon Valley

What a wild year for Disney. \$8 billion losses in streaming. Shrinking margins at the theme parks. One Bob out as CEO, the other back in. Sure, there were bright spots: *Black Panther: Wakanda Forever* and *Hocus Pocus 2* were celebrated by fans, critics, and generated impressive returns for the corporate giant. And *Avatar: The Way of Water* kicked off 2023 with a bang. But the company is at an inflection point in its 100-year history. Streaming, movies, and IRL alone won’t drive its long-term growth.

What we hope happens next:

To keep Gens Z and Alpha in the fold, Disney will become a full-blown tech company. The key will be giving them novel tech-enabled ways to participate. Younger audiences have grown up playing a role in the creation of the entertainment products they consume. As such, they expect tools that go beyond the company’s current offerings and will bring the brand to life daily. If Disney can extend the magic of parks and movies with next-gen creator tools, empowering anyone to become an animator, character creator or world builder right from their phone by leveraging Disney’s character-driven IP, Disney will transform the future of storytelling, and cement its business for the next century.

duolingo

Most likely to take over the school

The genius of Zaria Parvez, the 24-year-old social media manager behind the language learning app's TikTok account, has been well-documented. In 2021, she took the creative reins of the account. Free of the layers of content approvals that can be the death of brands on that platform, she began posting self-described "unhinged" content that spoke TikTok's meme-infused, trend-reactive language. In the process, she made a TikTok celebrity out of the brand's owl mascot (fittingly named Duo) and grew the account to 5.4 million followers. That social-first mindset shows up across all parts of Duolingo's business: the brand has brought Duo to life across SMS, email marketing and in-app upsells, added

social features like Streaks to the app, and even staged a conference called Duocon where the brand announced an expansion to math, the first vertical outside of language.

What we hope happens next:

A Duo & friends cartoon launches on Netflix, and the brand rolls out snacks featuring international cuisine as well as educational products that make Baby Einstein look like a relic. What if your kid's next math teacher were a talking Duo stuffie with a Tesla-esque OS that updated lessons as she completed them? Just saying.

EREWHON

Most likely to help us achieve self-actualization

In an era when self-care has become a religion, this LA-based premium grocer chain, which stocks the latest and greatest foods, beverages, tinctures, and supplements across the #cleanliving ecosystem, has become the wellness world's answer to Barneys New York. Celebs regularly get snapped by paparazzi shopping there, it's home to smoothie collabs with talent beloved by Zs like Hailey Bieber, and it stocks oversized totes and sweatsuits (a.k.a. the Gen Z uniform) as part of its in-house apparel line. Sure, the products are expensive by any sane measure. But compared to, say, \$250 sneakers, a \$25 bag of kale chips in Insta-ready packaging designed for off-the-shelf content creation seems like a steal, and arguably makes sense to a generation that came of age as Goop cleanses and #wellness content went mainstream.

What we hope happens next:

Erewhon has all the ingredients required to build a full-blown super app of wellness, leveraging its cult following to become a platform that delivers self-actualization, one smoothie at a time. Its recently refreshed membership program is the first step to cementing the loyalty required to make this happen. Or maybe just start with delivery outside of LA?

GUCCI

*Most likely to reignite your
“experimental” phase*

Name a luxury brand that speaks the language of Gen Z more fluently than Gucci. We'll wait. The brand may be out of reach for most Gen Z consumers, but that hasn't stopped it from establishing relevance among this cohort that will pay dividends for years to come. (It's currently the top luxury brand Gen Z *wants* to own). So what's the brand's secret? A drumbeat of innovation across platforms where Zs congregate that reflect how this generation communicates and prioritizing values it cares about, like inclusivity. In just one year the brand staged a collaboration with quirky Trainspotting TikTok Francis Bourgeois for its North Face collaboration, partnered with esports organization FACEIT to start a gaming academy, set up a permanent virtual town in Roblox, launched a

curated archival retail experience that does double duty as a portal to the metaverse and drops of digital toys and collectibles, and partnered with Adidas for a collection.

What we hope happens next:

Though creative director Alessandro Michele departed at the end of 2022, we expect the momentum to continue with an expansion of physical-meets-digital assortment. (Sorry, we can't bring ourselves to utter the word 'phygital'). In the meantime, the brand will continue to enjoy its strong following on TikTok.

I DEW CARE

*Most likely to trip and fall
holding a selfie stick*

When it comes to building a beauty brand these days, if you're not leveraging social in every way, you're NGMI. The Korean beauty brand I Dew Care, currently filling the bathroom cabinets of Gen Z girlies everywhere, seems to have internalized this edict. One quick look at its TikTok, and you'll see exactly how: its short-form video execution is 10/10. Products look irresistible, and not just because they're visually appealing (which is table stakes), but also because they inspire girls to make similarly compelling content at home, essentially deputizing an army of micro-influencers to rep for them. It's clear that the content insights gleaned from the brand's consumers inform physical product creation: why

else would face mask sets come with tweezers or face-cleaning tools have delightfully squishy ASMR elements? It's all about the #content, duh.

What we hope happens next:

While other standout Z brands like Starface, LANEIGE, and Glamnetic have leveraged similar social-first playbooks to dominate in DTC and social growth, we expect I Dew Care to translate its digital magic to physical stores next.



Most likely to be the guy you end up marrying

LinkedIn is like the boyfriend you rejected in high school for not being exciting enough, but who grew up to be kind of awesome. During a tumultuous year of Elon drama on Twitter, polarizing hate speech on Facebook, and Chinese surveillance chatter on TikTok, LinkedIn remained a constant, stable, reliable presence: the social platform equivalent of a safety school, which, of course, made it the subject of endless shit-posting. And with record layoffs across every industry, the platform devoted to work became a neutral place to express vulnerability and demonstrate genuine empathy across industries. (The “Open to Work” badge LinkedIn dropped in 2020, which boosts posts to reach potential new employers, is the product expression of this positivity.)

What we hope happens next:

Gen Z is completely reshaping the workplace, but the platform doesn’t yet reflect the shifts the generation is ushering in. In 2023, we’re guessing the product evolves to showcase the multi-faceted, non-linear careers Zs are building, with features for showcasing their work via video and images—hello, Figma integration!—plus creator commerce tools like course integrations and digital product functionality to make the platform a one-stop shop for rising solopreneurs.



Most likely to make MTV look like a cultural blip

Lyrical Lemonade embodies the multi-hyphenate ethos of Gen Z perhaps more than any other brand in this yearbook. What began as Illinois high school videographer Cole Bennett’s blog chronicling up-and-coming Chicago rappers has since become a media juggernaut, with a production company, record label, festival, merch, and a 20M+ YouTube channel that has launched numerous rap artists into notoriety. Along the way, Bennett, now 26, became the go-to video director for a host of hip-hop talent, among them Juice WRLD, Eminem, Wiz Khalifa, Lil Pump, and Ski Mask the Slump God. He’s already doing brand deals with Nike and Illumination Entertainment (Lyrical Lemonade was behind Yeat’s “Rich Minion,” which became a breakout hit and sparked the TikTok virality

that led to its popularity among Zs and jaw-dropping box office, something no song on the official soundtrack could come close to claiming).

What we hope happens next:

Cole already set his sights on building the next MTV, but considering his track record, that seems far too diminutive. We predict he’ll think bigger: upending artist ownership models via Web3 technology and reinventing concert ticketing, perhaps. Or just get more of that corporate money by teaming up with Google on rising hip-hop artists’ showcases in cities where ‘rap’ is the most-searched musical genre.

Madhappy

Most likely to grow up with a clear conscience

Want to launch a fashion brand that has Gen Z consumers lining up around the block? Pair it with a higher purpose. For Madhappy, that purpose is to normalize conversations around mental health—an increasingly relevant topic to its core audience, as rates of anxiety, stress, and depression among this cohort ascend to epidemic levels. While this LA-based brand may sell streetwear, its mission is firmly centered in all of its content, experiences, and product drops. The result is a flywheel powered by meaningful conversations. (We're not quite sure how the Madhappy x Larry David collection fits into the mission, but we'll take it.) **Honorable mention:** PANGAIA is another streetwear brand with a cause Zs love. Unlike most so-called earth-friendly brands, this B Corp actually delivers, with bio-based, animal-friendly

alternatives to environmentally harmful fabrics from its team of biologists, fiber scientists, and engineers that's as stylish as it is sustainable.

What we hope happens next:

Since Madhappy has already amassed a following with content including a text hotline, podcast, and editorial site, it is well-positioned to launch the next mental health-centric social network, or perhaps simply team up with Gas App, the anonymous question-and-answer platform devoted to doling out compliments to friends that caught fire with teens over the summer.



Microsoft

Most likely to peak long after high school

Once upon a time we may have lamented this iconic tech brand for its *Office Space* vibe and lack of connection with Gen Z. Xbox was the exception, and the moat that protected it from irrelevance with young audiences. But its 2022 purchase of Activision Blizzard for \$69 billion—the highest price ever paid by a US tech company in an acquisition—is set to change that (assuming the FTC doesn't kibosh the deal), by bringing the company deeper into gaming, which Zs and their Alpha brothers and sisters are obsessed with. The shift in company culture that CEO Satya Nadella has ushered in, i.e., moving the workforce from 'know-it-alls' to 'learn-it-alls', aligns well with Z's always-be-learning mindset, the product of growing up with learning tools and unlimited access to information.

What we hope happens next:

A full-blown Clippy comeback that captures Z's love of '90s nostalgia and taps into the broader re-evaluation of work-and-grind culture surfacing in communities like r/antiwork. Plus: unlocking the power of its investment in OpenAI in new ways, such as adding game-changing AI capabilities to Microsoft Office, thus enabling members of a generation accustomed to creating on-demand to channel their imaginations using AI tools—a move that would enable the company to truly outpace Apple.



MINIONS

THE RISE OF GRU

*Most likely to end up in an HBS case study on *chef's kiss* viral marketing*

Sure, *Minions: The Rise of Gru* isn't a brand in the typical sense. But it arguably generated more viral traction among Zs than any brand we encountered in 2022, or maybe ever. When was the last time any launch from a corporate entity felt like a can't-miss cultural moment? The perfect storm that propelled the film to gross nearly \$1 billion in worldwide box office sales (yes, that's billion with a "b") was the result of an unorthodox approach that turned the traditional movie marketing playbook on its head, brilliantly tapping Gen Z's love of meme culture, niche fan communities, '90s nostalgia, music-as-cultural-capital, clever brand integrations, and the 24/7 participation enabled by social platforms. The result: a massive hit that prompted moviegoers to flood screenings dressed as "Gentleminions"

to take part in one of the most viral moments ever sparked by TikTok (the #gentleminions hashtag recently hit 307M views). All of this, no less, during an active pandemic when overall theatrical box office was way down.

What we hope happens next:

Bottle up the energy surrounding the film's release into 365-day-a-year executions. Start by offering fans the chance to create their own Minion avatars to create custom storylines. Failing that, we'll settle for adding "Minionese" to Duolingo.



MRBEAST BURGER

Most likely to put Burger King out of business

MrBeast (a.k.a Jimmy Donaldson) may have launched his eponymous YouTube channel a decade ago, but 2022 was the year he arguably broke through to the mainstream, becoming the biggest YouTuber in the world with 112 million largely Gen Z followers tracking his every move, from over-the-top stunts like colonizing a mountain in Antarctica (a move sponsored by Shopify) to giveaways totaling millions. It was also the year he accidentally-on-purpose created a mob scene in a New Jersey mall, attracting over 10,000 fans to the opening of the first physical location of his delivery-only restaurant chain, MrBeast Burger, which otherwise operates out of thousands of partner kitchens worldwide. While the primary ingredients of the MrBeast Burger may be virality and hype, and perhaps not much more, he certainly

leads the pack in demonstrating the epic profitability of creator-driven business models. **Honorable mention:** Feastables, MrBeast's CPG brand of gluten-free and plant-based chocolate bars, which happen to be legit delicious, and may be the only chocolate bar with a dedicated Discord server.

What we hope happens next:

Given Jimmy's penchant for making a splash IRL, we expect him to go big. Meaning a MrBeast World probably isn't far off. He's already Gen Z's answer to Walt Disney, so why not make it official?

NETFLIX

Most likely to be BFFs with everyone

Netflix's prowess in marketing to young audiences is legendary. As one of the first corporate entities to embrace Twitter, it led the brands-as-people trend, inserting itself into cultural conversations with sass and self-deprecation. Netflix leveraged that same energy for *Wednesday*, *The Addams Family* revival that's become a phenomenon, smashing viewing records with nearly 23 billion views of the #wednesdayaddams hashtag on TikTok, thanks to a dance clip from the show. The brand's marketing playbook (stunt marketing + risk-taking social strategy + real-time fan reactions) leverages an understanding of Gen Z tastes and the dynamics of Internet culture to spark virality. Brands looking to speak to Zs need to pay attention.

What we hope happens next:

After years of too much Netflix (thanks, Covid), we're jonesing for IRL interactions. The platform is already crushing it with experiential marketing tied to shows like the *Stranger Things: The Experience*. Next is finding ways to establish Third Spaces for superfans via brick-and-mortar outposts. This could include next-gen screening rooms or restaurants modeled after LA's cult-favorite Chain. And maybe they'll roll out avatars that let fans remix Netflix IP to continue the story once the last episode airs? If not, we'll settle for a bigger merch play: Wednesday x Spirit Halloween x Liquid Death collab, anyone?

ROBLOX

Most likely to create the currency of the future

While crypto dominated headlines in 2022, gaming platforms quietly made a killing from in-game virtual currencies. Our favorite is Robux, used by players on Roblox, which has 43.2 million daily active users at last count, to purchase in-game upgrades and avatar accessories. (Brands like Samsung and Nike set up virtual worlds on the platform in 2022.) While we don't know exactly how much revenue Roblox generates from sales of the currency, the company generated \$1.9 billion in revenue in 2021, a 107% increase year-on-year, and sales of Robux is a major source of it. Given its Gen Z audience base (more than two-thirds of all 9-12-year-olds in the U.S. play Roblox), Robux already has an enviable stronghold on Gen Z, having become the preferred currency of teen allowances everywhere. **Honorable mention:** We

also love Fortnite's V-Bucks, which is used on the de facto social network to buy everything from skins to emotes. (The company sold \$50M from a single set of NFL-branded skins.)

What we hope happens next:

Now that the "it" virtual skin has replaced the "it" bag, we want the ability to move our skins from virtual world to virtual world. Thanks to Web3-enabled tech, that option, theoretically, isn't too far off.

By

SHEIN

*Most sharp-elbowed fashion plate
in the schoolyard*

While TikTok dominates Gen Z's eyeballs, SHEIN dominates Gen Z's closets. During a mind-blowing year for the Chinese fast fashion retailer, it officially took the top spot for largest fashion retailer globally, ahead of Zara and H&M, winning over the hearts and wallets of teens and their parents, one \$6 dress at a time. SHEIN's formula: moving at the speed of TikTok trends. Unlike its legacy peers, SHEIN is a technology company that happens to sell apparel, or anything else they choose to make, enabling them to pull off feats like A/B testing physical goods. They've been called out for questionable labor practices, health concerns, and an abysmal environmental record, but none of this has stopped their unprecedented growth (#sheinhaul has been viewed over 7.6 billion times on TikTok,

serving as a stark reminder that Gen Z is not a monolith demanding its brands be ethical at all costs).

What we hope happens next:

The brand rolls out apparel creation tools that empower anyone to design products, test them with SHEIN audiences, and manufacture them using their unparalleled supply chain—a move that would tap into Gen Z's desire to create, not just consume. That said, we hope to see a more sustainable platform knock them off their throne.

By



shopify

Most likely to succeed

If there is a single platform most perfectly positioned to take advantage of the spending habits, seismic cultural shifts, and potential of a wildly entrepreneurial generation who grew up shopping online, it's this one. All-in-one commerce platform Shopify anticipated the creator economy boom long before it was a thing, and is now poised to benefit from its growth for the foreseeable future, as well as related trends like the rise of online shopping, which is projected to hit \$31 trillion globally by 2025. In 2022, the company made several moves that aligned the business around creators, which has made it the go-to commerce platform for every TikTok micro-influencer with her sights set on building the next Kardashian-esque empire.

What we hope happens next:

To avoid being disintermediated by the big social platforms, Shopify's Shop app steps up its game significantly with data-driven curation and a social graph that enables users not only to shop creators' brands, but also to shop the Shopify stores creators themselves shop. It would be affiliate marketing on steroids, and we'd be here for it.



TikTok

*Most likely to be more popular than
Regina George*

Paging doctor obvious: TikTok is a big deal with Gen Z, something the daily headlines about the platform's dominance with young audiences never let us forget. But all that noise obscures what we're witnessing, which is truly a first of its kind: the TikTok-ification of everything. It seems as if every platform is taking, er, #inspo from the Chinese behemoth's signature short-form video feed, from those unabashedly ripping it off (Facebook, Amazon, Instacart) to those more subtly testing the waters (Etsy). When was the last time one platform's core feature became an existential threat to the biggest companies on the planet? Speaking of which: a Google exec admitting that TikTok is eating its lunch in search was not on our 2022 bingo card. The most fascinating part is that it

all happened in plain sight, forcing Silicon Valley to wake up and start innovating after a decade of coasting along the 101.

What we hope happens next:

Despite all the chatter (not to mention threats to national security flagged by the FCC), a US ban is unlikely. TikTok's social commerce launch is set to happen this year. When it does, we anticipate a fire hose of consumer products reverse-engineered to appeal to specific micro-communities like #cleantok (61B views), #antiwork (129M views), and #hotgirlwalks (50M views).



UGG

*Most likely to be voted best
dressed once every decade*

While Crocs and Birks have both staged comebacks in recent years — does any product embody the Gen Z mindset more than Crocs' Jibbitz charms? —UGG was the footwear that dominated 2022 among Zs, or at least the one that played a starring role in their holiday hauls. The comeback arguably began a year prior with fashion-forward pairings like UGG x Telfar and smart influencer seeding. Then 2022 brought a host of delightfully unexpected collaborations across fashion, design, and culture, plus immersive marketing initiatives. All of this cemented the brand's reign not just as a '90s artifact that was back in vogue, but as a wardrobe staple embodying cool-girl comfort that was suddenly everywhere. Every style icon that mattered to Gen Z

girls, from Dua to Kendall to Kaia to Gigi, was snapped in them. We have always assumed sneakers would be the dominant footwear choice for younger consumers, thanks to their comfort-meets-style-meets-streetwear trifecta, but UGG's ascendance gives us pause.

What we hope happens next:

UGG rolls out its answer to Jibbitz, enabling consumers to make each pair uniquely their own, with custom color combinations and cheeky monogramming poised for virality that harks back to the L.L. Bean viral canvas tote moment, plus more unexpected creator collabs to inspire and delight.

Looking ahead...

Most likely to make big moves in 2023



This Z-fave chain is often called a bank that sells coffee. So of course it's leaning into the financialization-of-everything. This year it will bring Web3 to its loyalty program with Starbucks Odyssey, unlocking digital, physical, and experiential benefits via gamification.

dELiA*s

For a certain segment of Millennials (us!), the arrival of the dELiA*s catalog was an event. With a craving among Zs for '90s nostalgia, the grunge-era brand is ripe for a bigger comeback than the one retailer Dolls Kill mounted in 2018.



The streaming platform is missing opportunities to wow Zs. May we suggest a more robust social graph (what's Beyoncé's wake-up music?), and more opps that telegraph identity through music vs. the one-and-done that is Spotify Wrapped.



Horror is having a major moment among Zs, and Halloween spending has exploded. Spirit Halloween, the biggest Halloween retailer in North America, has a scary amount of room to flex. Think horror franchise collabs, pop culture-driven costume collections, and tapping genre-specific creators.

Yearbook Editors



Sara Wilson

Sara is a journalist-turned-social-marketer who works with brands, publications, and platforms like Nike, YouTube, and Bumble to help them find, engage and grow obsessive communities across digital channels through her consultancy SW Projects. Sara writes frequently on digital marketing trends; she coined the term “digital campfires” in the Harvard Business Review to describe the types of spaces young audiences are gathering online today, and often speaks on this and other topics related to social innovation to companies such as Microsoft and McKinsey. Prior to founding SW Projects, Sara ran lifestyle partnerships at Facebook & Instagram and was an editor at The Huffington Post.



Michelle Goad

Michelle is an Operating Partner at The Chernin Group and the Founder of Thompson Street Studios, a digital commerce strategy firm and innovation studio focused on developing corporate strategy and new growth-driving consumer experiences. Previously, Michelle was Head of Global Branded Services and GM of Gen Z Innovation at Nike, co-founder and CEO of the pioneering social shopping app PS Dept. (named a Breakthrough Brand by Fast Company) and a fashion executive for several leading luxury brands. She has been featured as an authority on new commerce in publications such as the Wall Street Journal, The New York Times, Vogue, and more.

For in-house speaking and strategic initiatives to help your organization connect better with Zs, [contact editors@thebrandyearbook.com](mailto:contact_editors@thebrandyearbook.com)

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