

THE : FUTURE : LABORATORY

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PEOPLE. CONTENT. CULTURE.

: EXECUTIVE SUMMARY



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# Executive Summary : 07

Report highlights and key findings

# Executive Summary

Social destinations like MySpace have quickly become a staple media of choice for a generation of 18-to-24-year-olds who are using them to 'put their lives online'. This networked generation are using these sites to explore new levels of creativity and develop new ways of doing business online, according to a ground-breaking report, MySpace 08 : People. Content. Culture, by MySpace from The Future Laboratory.



## The Shape Of Trends To Come

Over a six week period researchers at The Future Laboratory used a variety of quantitative and qualitative techniques, including an online 'virtual hide', to carry out over 15,000 'conversations' with social network users to explore how people, content and culture are colliding on the web.

The results were astonishing – we found new and emerging tribes, trends and lifestyles that had previously gone undetected by the fashion and lifestyle mainstream.

18-to-24-year-olds also told us that if they had 15 minutes of free time they would rather spend it checking out their favourite social networking sites (45%) than watching TV (9%), reading (6%), playing video games (5%) or talking on their mobiles (4%).

The fact that social networking has become more popular than watching television is a major new development in media consumption, and shows peoples own lives are entertainment in the new world.

The research shows that people are now spending longer on social networks than any other sites.

In 2007, the average visit length of the top 20 social networking websites was 25 minutes 27 seconds, compared to 10 minutes two seconds for other types of websites.

And as our survey reveals, women are now more likely than men to choose Internet and social networking sites for pleasure, spending an average of 22.5 hours online compared to the 20 hours spent by men.

Using social networks has also changed the way we engage with media in general.

Some 43% of respondents to our survey said that using social networks had substantially driven up the amount of emails they send and receive, while 22% said that it had decreased their use of video games, 25% said it had increased their use of instant messaging and a further 25% said it had decreased the amount of television they watch.

The survey, which polled 1,000 social network users across key regions and user age groups in the UK, also discovered that for 18-24-year-olds and 35-45-year-olds in particular, social networks are one of the key places to discover a new band, pop star and DJ, with 35% of the 18-24 age group saying they did so and 30% of those in their mid-thirties.

More than ever, social networks are blurring the online and offline worlds, evolving into social destinations that are driving the wider direction of the web and affecting industries like advertising, music and politics.

## More Demanding Users

The survey reveals that networks like MySpace have raised our expectations about the brands we buy on a regular basis.

They have made us more demanding and discerning as shoppers, with 22% of 18-24-year-olds believing that brands 'have to work harder to earn their respect' and 13% saying that social networking sites have made them expect more from brands and their online content in general.

In terms of content, creativity and generating ideas, more and more people are looking to social websites like MySpace for help, inspiration and new ways of making money.

Some 13% of respondents say these social destinations are the best place to look for creative ideas, or to plug into the more trendy, unusual and bizarre aspects of global culture.

Many young people are also using social networks, instant messaging (IM) and email to talk about subjects and issues they have difficulty broaching face-to-face.

In our survey, 44% of 18-24-year-olds said they used social networks to discuss ideas and to find out more about politics, their community, charities and political groups, challenging the idea that networks are just about meeting friends.





## Social Niceworking

The term 'social niceworking' was used by some of the correspondents to describe the growing number of people or micro-sites that promote charitable causes or offer free advice and feedback.

As our respondents indicate, the nature of social networks themselves is maturing and is now much more than just friending.

## Culturpreneurs

According to our research, many now see them as a way to put their commercial, creative and cultural skills to profitable effect. Indeed, 14% of these so-called 'culturpreneurs' between 18 and 24 have already earned money through social networking, and 12% think a good social networking site should allow them to make money as well as connect with friends and people with likeminded interests.

On MySpace, earning good money from art is not looked down on but is in fact the goal, with many users – 12% according to our survey – keen to create money-making sites or schemes.

Culturpreneurs such as indie film maker Omelihu Nwanguma of Inspire Media and t-shirt designer Kesh both use MySpace to raise funds – the former by offering production credits in exchange for cash to shoot a movie and the latter by selling limited edition t-shirts to a select but powerful group of fans.

Other case studies identified in the report include Warrington-based Nico Reynor, who runs his own music-based charity initiative via his MySpace page. There is also Liam Walsh, a street magician who has developed a cult following offline thanks to his cut-to-the-beat tricks and street patter online, not to mention a team of Roller Derby Girls from Glasgow (a cult activity in its own right) who manage and grow their league nationally and internationally via their MySpace page.

We asked social network users to determine the kind of networker they are based on usage, activity and their ability to create, consume or sell products. The major typologies to emerge were the moneymaking Culturpreneurs, link-passing Connectors, network-using Transumers, 'people power' ethos Collaborators, new-movement-seeking Scene Breakers and the friends and family-only messaging Essentialists.

All are covered in-depth in the main body of the report, along with the growing number of Tribes, Trends and Super-Consumer groups identified via our PROJECT: CREATIVE LAB, an online 'virtual hide' established by MySpace and the Future Laboratory's research team to identify and interact with new and emerging sub-groups that are set to influence creative and cultural thinking over the coming year.

As the team discovered, and as the full report illustrates, social networkers who use MySpace as a 'try-space' (as one of our correspondents put it) are spearheading new behaviours that represent their 'can-do' mind sets and, increasingly, their cultural and commercial outlooks.

## Fly Solo

MySpacers, for instance, are using the site to its maximum potential, handling their own management, distribution, sales and marketing with little or no input from outside sources.

## Do-It-All

This DIY (Do-It-Yourself) culture is mutating into a new DIA (Do-It-All) culture. In the same way that MySpace allows creatives to handle all aspects of their career it is also encouraging them to diversify and expand their skills, with musicians often producing their own album covers, events flyers and t-shirts.

## Know Thy Digital Neighbour

Despite its global reach, MySpace has also been pivotal in fuelling the growth of local scenes and community-based activities. As up-and-coming audiovisual DJ VJ1000Errors says, 'the fact that you can search for people within a distance radius and add them to your mailers can really help spread awareness of a local scene'.

## Glocal

It has also become much easier to connect with like-minded people from around the world rather than just the immediate vicinity. Many examples of this are contained within the report. For example, the second-ever issue of Fever Zine, a 28-page photocopied fanzine, has contributors from the Netherlands, Belgium and America, despite the fact that its creator, Alex Zamora, lives in East London. The contributors contacted the zine through MySpace, and were happy to contribute for free.

## Talent Exchange

Talent swapping, talent exchanges, and talent-tanks (as opposed to think-tanks) are also becoming a key phenomenon of note for 2008, thanks to the activities of talent swap or trade sites on MySpace.

## Work Space

MySpace, as the report indicates, is increasingly a breeding ground for new occupation and interest-based communities that were previously unconnected. For example, young chefs demonstrate their skills with slide shows of their most impressive culinary achievements, while barbers specialising in black and Asian hair styles swap tips, big up each others' clipper work and give advice to junior stylists.

## Online Angels

MySpace also contains a burgeoning community of amateur Agony Aunts. Up-and-coming singer Karen Bishko started an official Dear Karen problem-solving blog after the emotional songs she writes encouraged friends to ask her advice on situations. Meanwhile, Carly from Edmonton in North London, aka hotblacchic, also regularly answers problems in her blog, as does 25-year-old Josh, aka Swish Bish.

## Issues Networks

With cable and terrestrial TV channels awash with soaps and reality TV shows, social networkers are turning to MySpace to access issue-related programming, as the report shows.

OneWorldTV and BigPictureTV show documentaries and videos on human rights, sustainable development and environmental issues. OneWorldTV boasts work from film makers in Britain, Afghanistan, Indonesia and the Congo, and gives its members the opportunity to connect with 4,500 international filmmakers concerned with issue-related programme making.





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Now that users are familiar with the formats and array of communications and expression tools found on social networking sites, MySpacers in particular are pushing the boundaries of what can be done online, as the Future Laboratory team discovered when they established PROJECT : CREATIVE LAB, their online 'virtual hide' and trend anthropology site inside MySpace.

The first of its kind, the hide was established to understand and capture the new tribes and trends set to emerge in 2008.

Groups identified include;

: Slash/Slash Kids (Multi-skilled kids with a do-it-all creative ethic for music, fashion and design)

: Double Dressers (teens who dress, act and behave like twins)

: Tea Cake Tuesday Boys (mad-hatter types who prefer tea to alcohol)

: Mindies (non-drinking, underage indie music fans, who look, dress and behave like their teen band tee-totalling idols)

Among the more involved activities identified by the PROJECT: CREATIVE LAB and its research team are several trends that are expected to make big inroads in 2008:

### Everyday Heroes

Many MySpacers are using the site to pay homage to their favourite everyday heroes by creating 'shrines' or profiles for them, often without their knowledge.

### Social Niceworking

Launched by hip-hop producer Nico Rayner of Warrington, MagicPass aims to raise money for Oxfam through a musical chain. An Akai MCP4000 digital recording device is sent to a global chain of recognised music producers who Rayner invited to contact him through MySpace. Each producer or artist is required to leave a beat, track or rap on the device before passing it on. When the uncomposed MPC400 device returns to Rayner, he will compose the music into a compilation, the profits of which will go to Oxfam.

### Brand Me

Paul Griffiths is a MySpace 'me-brand', as he calls himself. He has 62,826 friends (and growing), his own t-shirt line (Babycakes) and a promotions company called The Secret Party Ltd that manifests on MySpace as The Club Kids. He has sold 10,000 t-shirts since March 2007, a fact he attributes to 'people buying into his personality' (he doesn't sing, play an instrument or tell jokes) through reading his blog, viewing his pictures and watching video uploads of his drunken rants.

### Pepperpot Publishing

So called traditional media – printed magazines and newspapers – have long cited the Internet for their diminishing sales, yet for niche appeal fanzines and microzines, social networks have proved a real boon. Alex Zamora, editor of Fever Zine, a photocopied black and white zine that sells 600 copies per issue, says that 'if it wasn't for MySpace, we'd probably only sell 20 issues in a couple of shops in London. We have followings in creative, graphic design-hungry spots like Paris, Bangkok, Barcelona, Gothenburg and Sydney, which without MySpace would never have transpired.'

### Micropreneurialism

Nineteen-year-old Kesh, an East London designer, stylist and DJ, releases new t-shirts and hoodies one design at a time and in small batches of 20-200 onto her Big Cartel Kesh Wear retail space. Before doing so, she uses the power and the 'pass it on' effect of her friends network to tell them to tell others about the pending arrival of new stock – which, she says creates a rush of potential buyers to her Big Cartel site in 'much the same way crowds gather outside an Adidas or Puma store before the release of a limited-edition trainer'.

MySpace is a riot of new and experimental culture and styles, largely fuelled by the explosion of teens who rifle through bygone eras, some as recent as just two or three years ago, for cultural inspiration to put together a constantly evolving mish-mash of looks.

Some of the topline findings among the many new looks currently simmering on MySpace and set to appear in a club, store or bar near you for 2008 include:

### Slash/Slash Kids

Slash/Slash Kids are creative multi-skidders and culturpreneurs who define the DIA (Do-It-All) mindset. They don't just design clothes but also style, DJ, present and act and have no qualms about self promotion and putting their image 'out there'.

### Double Dressers

In a world that prizes individuality, a growing number of youths are embracing sameness – albeit of the studied and deliberate kind. What used to be every girl/boy's nightmare – accidentally wearing the same outfit as a peer – has become a contrived style statement known as 'twinning' or as we like to call it, Double Dressing, that is spreading throughout Asia, Europe and the US.

### Mindies

These under-18 indie fans are as earnest, dedicated and passionate, if not more so, as their elder indie counterparts when it comes to their music of choice. Free from the distractions of sex, drugs and alcohol, the scene focuses purely on the music. They love the more established indie groups, but this tribe's real heroes are their similarly aged peers in teen bands such as Pull In Emergency, Kid 4077, Forty Fives, Lion Club and US alternative punk/garage duo Tiny Masters.

### Urban Bikers

Urban Bikers are racially mixed, inner-city bikers who team their love of urban street culture with a passion for motorbikes. Their obsession with how they dress and look make them the antithesis of the stereotypical Hells Angels/tourer biker scene that has dominated British motorbike culture for the last three decades. Supreme Riders in South London are the unofficial scene leaders, with a dedicated team, garage, and salesroom. Since 2005 they have hosted the annual Urban Bike Fest event.

### Super Heroes Anonymous

Super Heroes Anonymous are individuals who give themselves superhero aliases and dress in matching costumes in order to become real life citizen do-gooders, crime fighters or public activists. They use MySpace as a place to communicate their mission and connect with other super heroes around the globe, and sometimes only accept friend requests from other super heroes.

### Tea Cake Tuesday Boys or Mad Hatters

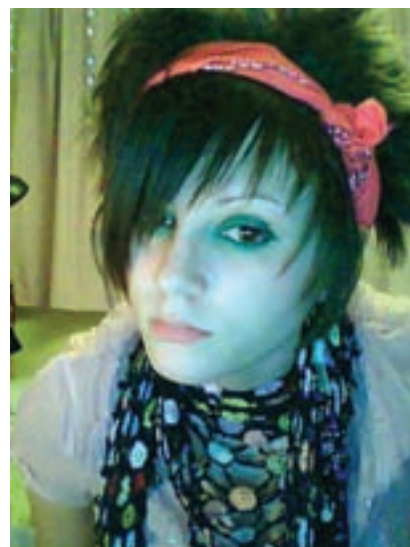
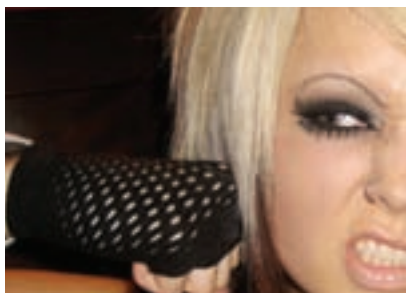
Mad Hatters are local teen communities based around the old-fashioned pastime of throwing a tea party with close friends. Nostalgic, young, fogeyish and cheerfully middle-class, this group is also about resisting youth stereotypes and dissociating from virtual socialising.

### Green Gauges

For the Green Gauges tribe, gardening is not just a relaxation activity, it's a way of life, a political statement and about making a stand against an increasingly desk-bound, concrete heavy, manufacturer dependent (as opposed to agriculture-based), 9am-9pm society. They revel in teaching and sharing their gardening knowledge with novice and wannabe gardeners, particularly when it comes to growing vegetables, fruit and herbs.

### Alt.black

One of the most interesting groups to watch for in 2008 (according to our PROJECT : CREATIVE LAB correspondents) are what we call Alt.blacks, a group of people who say they are rebelling against the stereotype of what it means to be black. Alt. black youth have experienced a comparatively racism-free society (compared to their parents) and are confident enough to mix their roots with current white and cross-over culture movements and genres.





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## Conclusion

The overall data collected by the hide has been instrumental in helping us work with MySpace members to identify and isolate the new tribes, tastes, buzzwords and must-do or must-have lists for 2008 – a full index of which can be found in the final section of our report.

Established originally to make contact with friends, family and colleagues more convenient and manageable, as this report indicates, social networks like MySpace have evolved into highly articulate, heavily visual, extremely collaborative and creative hubs, which have become for many a vibrant and engaging way to keep up to date with, and comment upon, changes in the wider cultural scene.

They have also become ‘culturpreneurial’ platforms that are increasingly used to manufacture, market, distribute and retail brands, products and services created by a new generation of ‘canny, can do’ teens.

This is the Internet economy in its mature stage, one where the user is also the creator, buyer, seller, retailer, distributor and ever-critical and passionate consumer: a blurred world where the traditions of the market have been collapsed and superseded by the new traditions of the network economy.

If anything, then, this report, offers us a small but significant and revealing snapshot of the shape of things to come – in business, in pleasure, in culture and in how we collaborate at the personal level.

And for that reason alone, social networks deserve to be studied more seriously and readily by anthropologists keen to understand how our sense of community has shifted from the real to the virtual and, in the process, back to the real again but in a way that empowers the many, as we see in ‘My Space 08: People. Content. Culture.’, as well as the few.