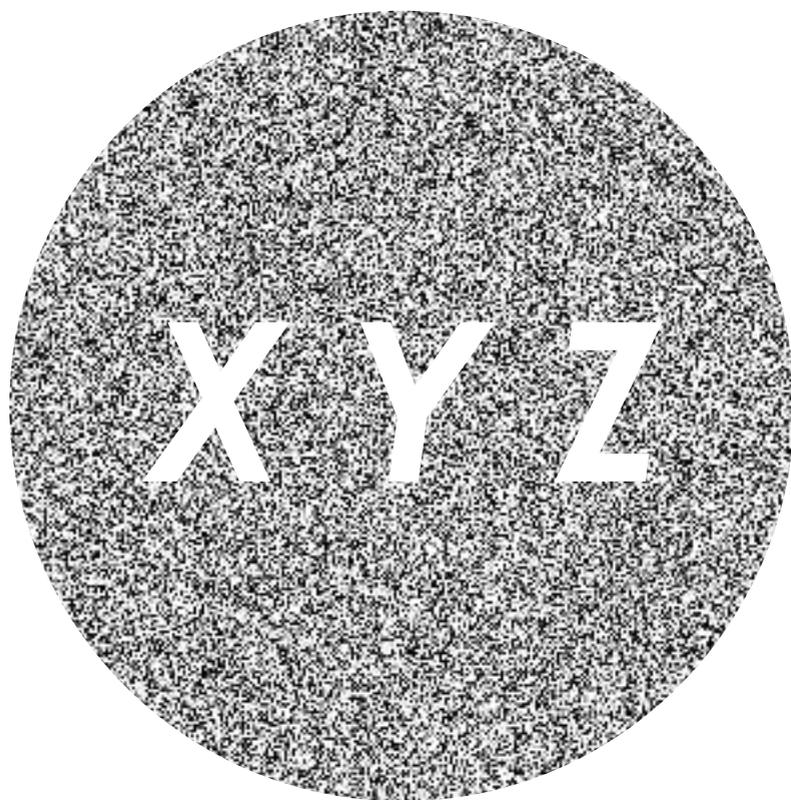


BD | WHITE NOISE
GENERATION ?!

*This
is
BD*



RESEARCH 2016

**THE DRUM // BAUER MEDIA // THE FUTURE LABORATORY //
LSN:LOBAL // MINTEL // FORBES // INKLING // AIMIA //
FUTURECAST // I-D // DAZED AND CONFUSED // THE
GUARDIAN // BBC // BUSINESS INSIDER // MARKETING
MAGAZINE // SPARKS & HONEY // COCA-COLA //
OUTDOOR INDUSTRY // JOHN LEWIS //**

ABOUT//

BD Network is an independent integrated agency based in The Tea Building in Shoreditch.

BD White Noise provides you with the information you need to help you understand your consumer a little better.

CONTENT //

Z

GEN Z

The cohort that are accelerating change in the way that agencies communicate.

Y

MILLENNIALS

One of the most talked about generations of today who are representing the need for change.

X

GEN X

A strong consumer group which one not to be forgotten in today's fast-paced world.





RO S&P THE ACTIVIST ISSUE OVERSOUND © NATALIE WESTLING PHOTOGRAPHY WILLY VAN DEN BERG



GENERATION Z

**WHO ARE GEN Z? // FAST THINKERS //
VISUAL LANGUAGE // WE NOT ME //
TEENAGE CEOS // BRANDS & INFLUENCERS**

GEN Z.

Generation Z were born between 1995 and the 2000s, making them around the ages of 13 – 18. Still at secondary school, Gen Z were practically born with a phone in their hand. They have grown up in a world where technology is nature, and a life without the internet isn't even worth questioning. However, alongside this we know that they were born into an unstable world of recession and poverty.

They communicate using a **visual language**, and have access to all of the information they need to survive in the modern day world - today we have seen our first **teenage CEOs**.

We know they are **fast thinkers** - they have attention spans of around 8 seconds, but don't see this as a bad thing.

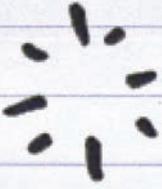
Gen Z have learnt from the mistakes their selfie-obsessed older Millennial siblings have made. They are concerned about the world, and their potentially unsettled futures - they are **Generation We**.

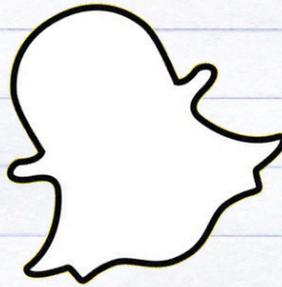
They have grown up knowing that it is possible to make money simply by posting on Instagram or YouTube. For them, YouTube stars are among their most important **influencers**.

BLINK. 

SHARE. 

LAUGH. 

FORGET. 



FAST THINKERS //

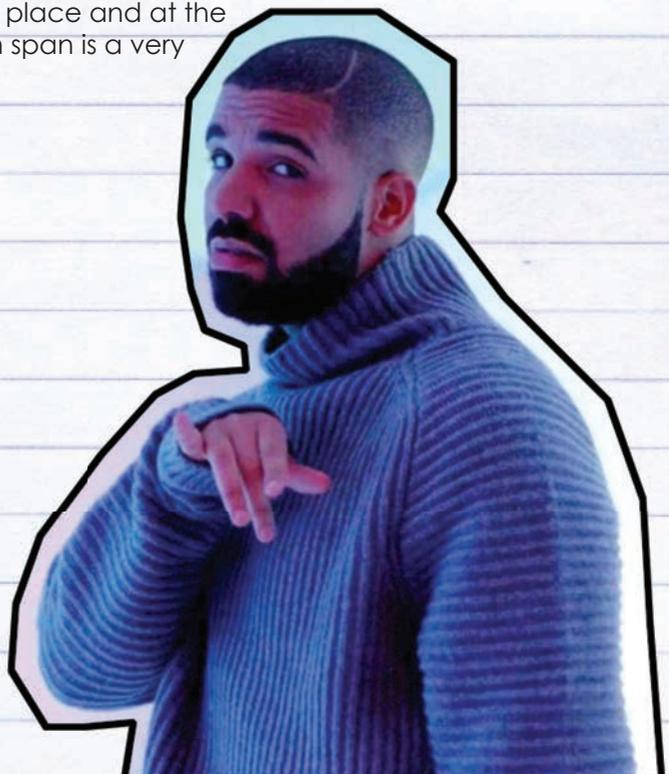
'Blink, share, laugh, forget' - a phrase we first heard from The Future Laboratory, and one that we feel best summaries our Gen Z cohort.

What does this really mean?

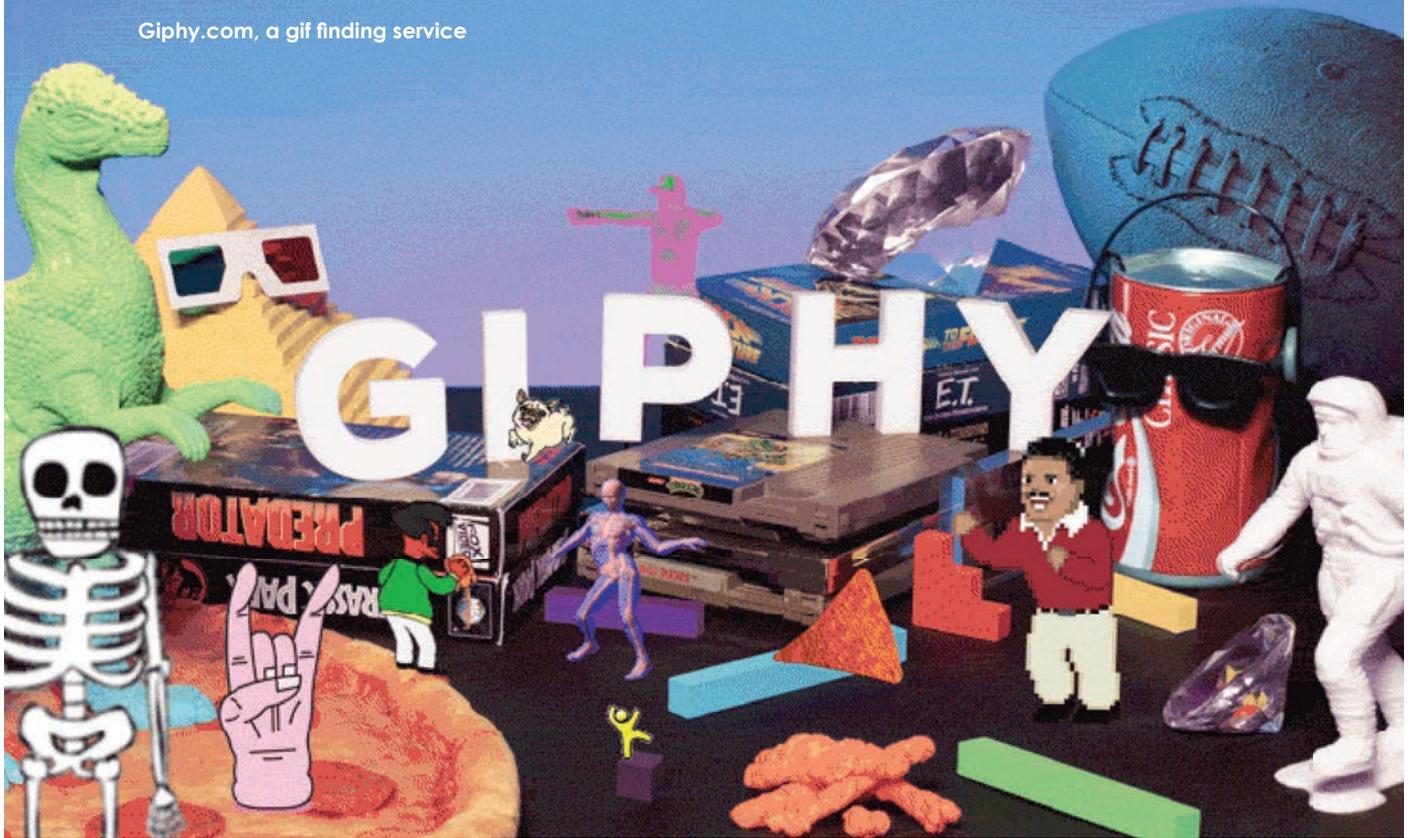
The best way to describe this is through the phenomenon that is Snapchat. A Gen Z'er receives an image, looks at it, laughs/cries/screams (delete as appropriate) and then within 10 seconds, it's gone forever and the next snap starts playing. Research shows that Gen Z typically have an 8-second attention span - but this is not to be seen as a bad thing. In fact, their minds have developed to be able to process information at a quicker pace than older generations. So whilst you are still reading the nutritional content on the back of a cereal bar, Gen Z have already read it, snapped it, posted it on Instagram alongside numerous emojis, understood the pros and cons of eating said cereal bar, eaten it, and moved back on to Whatsapp to ask their friends what they think of Drake's new video.

Phew.

For brands, this means creating bitesized, visual content that Gen Z can quickly digest and process. The more bitesized pieces of information you can get to Gen Z, the further along their path to purchase you can push yourself - you just need to make sure you are saying things at the right place and at the right time. After all, their 8-second attention span is a very savvy one.



Giphy.com, a gif finding service



VISUAL LANGUAGE //

Generation Z are visual communicators. From sending emojis in texts to Snapchatting their friends, they express their emotions through images. We know they work across 5 screens, from tablets to phones to wearables, and so their attention span is small, meaning brands have seconds to grab their attention.

Brands are now communicating with this audience through memes and hashtags, across social media sites such as Instagram, Twitter and Snapchat.

We have also seen the comeback of the GIF, through sites such as Giphy.com. This has shown a trend for lo-fi images becoming the new cool. On the other end of the scale, we are starting to see new forms of visual communication coming through from start-ups such as Magic Leap.

Magic Leap are a platform that are looking to deliver something along the fine line that lies between biology, art and tech. They layer augmented reality over the real world, making real world environments more interactive. The company has been heavily invested in by big names, including Google, but we are still awaiting the big reveal. However, what we do know is that this is likely to be on Gen Z's radar. It is the possibilities Magic Leap bring that really matters here - for Gen Z, tech and nature are fully integrated.

BRANDS DOING IT WELL //

Snapchat is a great platform to capture the attention of Gen Z, as it delivers bitesized chunks of information that need to be acted upon immediately, before the image disappears forever.

Asos are targeting Gen Z on Snapchat. Those that follow 'asofashion' get a backstage pass to the brand's photoshoots, product reveals, and unique discount codes. This quick-fire information is both on-trend and exclusive for Gen Z asos fans. The brand claims that although they are gaining little data on their audience, the platform is still relevant as they are seeing high levels of engagement from Snapchat users.

GENERATION 'WE' *"Let me tell you something about my generation. NOT 'ME' // There's a lot written about us. We get demonized by the older generations for being 'a vain, selfie generation', and 'all about me'. In reality, this couldn't be further from the truth. We're not a 'me' generation. We are the 'we' generation."*

BETH REEKLES, FROM A HAPPINESS STUDY, COMMISSIONED BY COCA-COLA

The above statement summarises Gen Z and their concern for the world and those around them. Their older siblings are Millennials (more on this group later), who are known for their frivolous spending and throwaway culture. Gen Z have learnt from the mistakes of millennials, and really do want to make a change to the world they are growing up in, from gender neutrality to saving the animal kingdom.

Brands are already starting to tap into this hunger for change. World Wildlife Fund (WWF) used Snapchat for a campaign titled 'The Last Selfie'. The top 5 endangered animals in the world were photographed and sent out on the social media channel with the caption 'Don't let this be my last selfie', in order to raise awareness of the rapidly declining numbers of the species.

On the other hand, Mattel's brand, Barbie, have been empowering girls with one of their latest campaigns, titled 'Imagine The Possibilities', showing girls thinking about becoming powerful business women. The campaign ultimately rids Barbie of its stereotypical blonde bombshell appearance, but for Gen Z, it shows the beginning of change for gender roles in society. Pink for girls and blue for boys is a bizarre concept for this generation.



THE RISE OF THE TEENAGE CEO // *“70% of teens are working in entrepreneurial jobs, such as teaching piano lessons or selling items on sites like eBay or Etsy. This is helping them to think outside of the box, preparing them to become tomorrow’s innovators”*

HARVARD BUSINESS REVIEW, SPARKS AND HONEY, GEN Z 2025

Sparks & Honey, a cultural research agency, have predicted that Generation Z will be working multiple jobs when they reach their twenties. However, employers will no longer see frequent short bursts of jobs as a negative, this will become the norm. This fast-thinking generation will be able to cope with more work, and they might have to, because if the futurists of today are right, Gen Z will be competing with robots for jobs...

Today, technology has become so advanced that we are able to access content from around the world in seconds. Apps are creating shortcuts for start-ups; anyone can order supplies and get them delivered within an hour using Amazon Prime, and sites such as Etsy have revolutionised opening online stores. This fast-paced world is granting Gen Z access to the assets they need to start a business. Global is the new local, or 'glocal'. Glocalisation has seen Gen Z become some of the first teenage CEOs, something that was not possible pre-internet.

TEENAGE CEOS //



NAME: Tavi Gevinson

AGE: 19

COMPANY: Style Rookie

ABOUT: An online fashion magazine

COMPANY FOUNDED:

2008, when Tavi was 12

NET WORTH: \$7 million



NAME: Robert Nay

AGE: 17

COMPANY: Nay Games

ABOUT: Games for iPad, iPhone, iPod Touch

COMPANY FOUNDED:

2011, when Nay was 14

NET WORTH: Unknown, but we know he made \$2 million in his first 2 weeks of selling games



NAME: Maddie Robinson

AGE: 17

COMPANY: FishFlops

ABOUT: Footwear for kids and young adults

COMPANY FOUNDED:

2006, when Maddie was 8

NET WORTH: Unknown, but we know she has made over \$1 million in sales

TOP BRANDS //



Peterson, H. (2015). How teens are spending money, what they like, and where they shop. Business Insider

INFLUENCERS //



Zoella
YouTube



Shaun McBride
Snapchat



Christine Mi
Snapchat



Amanda Jas
Instagram



Ryan Parrilla
Instagram



The Fine Bros
YouTube



FouseyTube
YouTube



Pewdiepie
YouTube



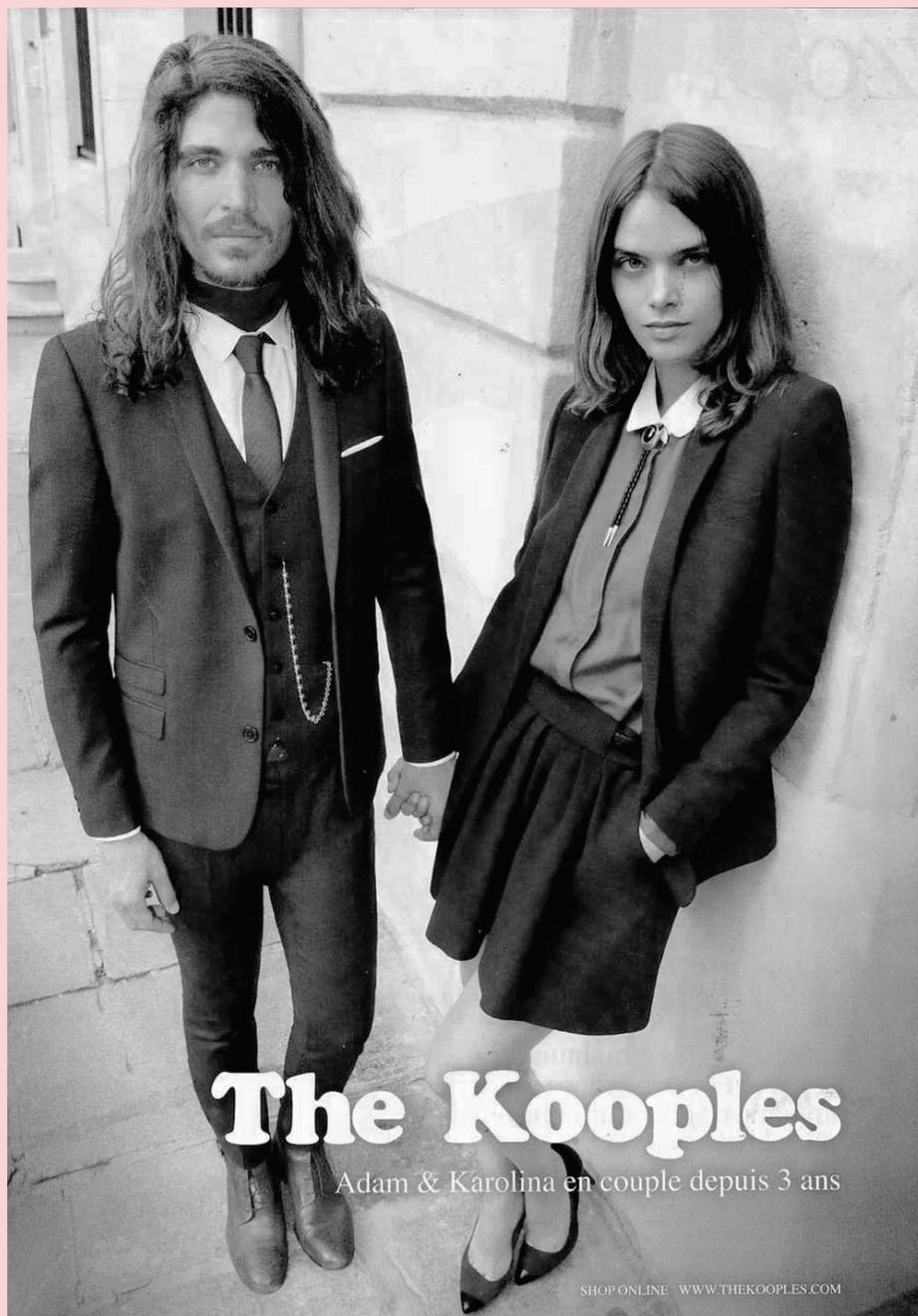
Shane Dawson
YouTube

Morrison, K. (2014). Top 10 YouTube Influencers and the Brands They Work With. Ad Week
Bergen, M. (2015). Gen Z Influencers to Brands: Let Us Be Ourselves -- and Forget Tumblr. Ad Age

GEN Z IN SUMMARY

Gen Z are a generation to keep our eyes on. Those that have not yet launched their own start-up will be entering the world of employment soon. This means the start of some spending power from this tribe, and so brands will need to think about delivering their comms in clever but bitesized chunks, in order to fight for 8 seconds of attention from this savvy, fast thinking group. For them, digital exists in their physical world. If a brand isn't online, then it may as well not exist. They are hopeful realists - they are fighting for change in the world and will continue to do so. They will love brands that can help them fight for this change, be it gender neutrality or animal rights - we are talking to a generation of activists. The brands they love are largely practical, and they are influenced by social media stars. Gen Z will be a powerful consumer group in the future.





The Kooples

Adam & Karolina en couple depuis 3 ans

SHOP ONLINE WWW.THEKOOPLES.COM

WHO ARE GEN Y? //

EXPERIENCES OVER EVERYTHING //

ALWAYS ON

// 'NO'WNERSHIP// SUPERLATIVE NATURE

GEN Y.

Millennials were born between 1984 and 1994. So today they are aged around 21 - 35. They are ambitious, carefree, know no limits and yet are unsure as to what the future might bring them.

Also known as Generation Y, Millennials are heavy social media users, particularly on Instagram and Facebook. We know they thrive off sharing **experiences** online.

They are '**always on**', meaning there is never a moment when they are offline, and when they are offline, they feel lost.

Alongside this, they have less responsibility than older generations - they rent their homes, cars, and even music and TV, otherwise known as 'no-wnership'. This makes them an interesting generation, who understand the benefits of instant gratification, and today expect everything to be easily accessible.

EXPERIENCES *“73% of this audience agreed that FOMO (Fear Of Missing Out) is their primary motivator in seeking **EVERYTHING//** out new live experiences and activities.”*

Inkling, Millennials Book, 2015

Our audience are heavy mobile users, and so are constantly seeing updates from friends on what events they have been to on various social media sites. This creates a need to find the next best thing.

Millennials crave experiences. In fact, they cherish experiences over owning things, as long as those experiences are shareable. When we say shareable, we mean being able to show off attending said experience on Instagram, Facebook and Twitter.

“53% would rather spend money on an experience than a possession”

Inkling, Millennials Book, 2015

Brands are creating niche experiences to play to the niche needs and wants of our audience. Today we are seeing more pop-ups than ever before to play to the Millennial generation. Great examples include Castello's cheese pop-up shop, Bompas and Parr's Alcoholic Architecture pop-up that allowed visitors to inhale alcohol, and Lynx's Black Space, which was dedicated to launching a new antiperspirant and the blackest black you've ever seen. We know from research that Millennials are favouring these types of experiences over going out to nightclubs - after all, these are far more shareable in the world of Instagram.

New Theory Magazine. (2015). Bid Farewell: Why Millennials Are Abandoning Nightclubs.



Bompas and Parr: Alcoholic Architecture



Castello: Pop Up Store



Lumier Festival



Cadbury: Creme Egg Cafe



Lynx: Black Space

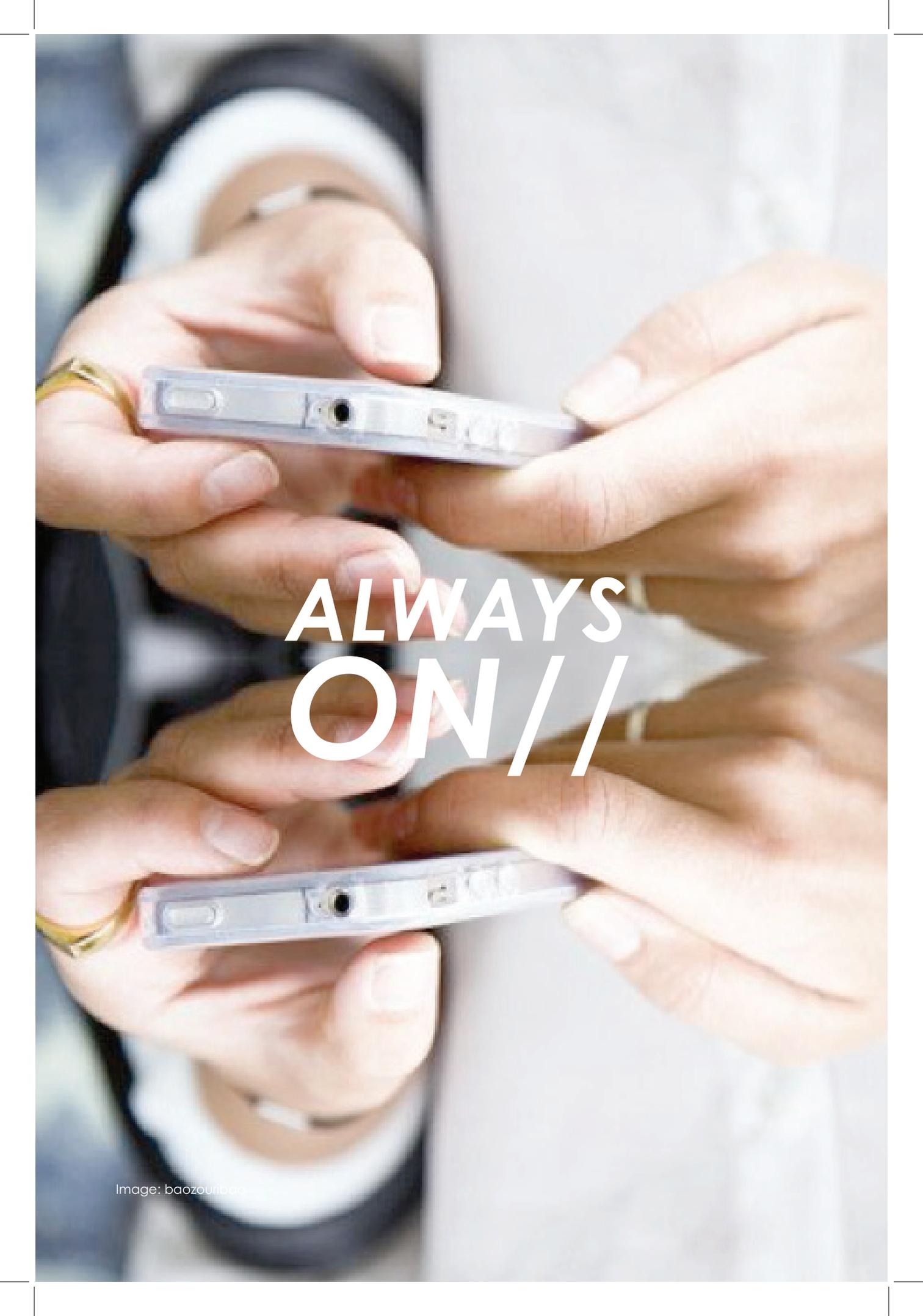


“Living a meaningful, happy life is about creating, sharing and capturing memories earned through experiences that span the spectrum of life’s opportunities.”

Morgan, B. (2015). NOwnership, No Problem: Why Millennials Value Experiences Over Owning Things. Forbes
 Images: Art Experiment Garage CCC 2013, Q Awards, A Hope, Seventa Events



Rekordelig Summer

A close-up photograph of two hands holding two identical smartphones side-by-side. The phones are held horizontally, with their edges facing each other. The hands are positioned as if comparing the devices. The background is a blurred, light-colored surface. The text 'ALWAYS ON//' is overlaid in the center of the image.

**ALWAYS
ON//**

Millennials will look at their phone 221 times a day. Those phones are connected to the internet. The Internet provides them with most things they need to get through their daily routine.

MOBILE

Their phone is an extension of themselves - the boundaries between physical and digital are blurred. With the onset of wearables, Millennials are becoming increasingly connected to the internet. This also means that we are able to provide more data on ourselves. The more data we provide, the better brands are able to personalise the services that they give us. Personalisation is a hot topic, and the more we can personalise a promotion to a Millennial, the more likely we are to gain the attention of this always-on group. For brands, it's about getting in front of a Millennial's eyes, through one of their devices, at one or more of these 221 views

of a phone in a day - the onset of wearables will make it easier for brands to tailor their message to ensure they talk to the right person at the right time.

WEARABLES

Talking of wearables, after the demise of the infamous Google Glass, Microsoft have come forward with Hololens - a device that layers virtual reality over the physical environment. Although this device is in its early stages, it's a potential hint to the future of 'always on'. Instead of having to look down at their phones, our Millennial audience can strap on their Hololens and get live updates from friends literally right before their eyes. This is a sign that tech will become increasingly integrated into everyday life for our first true digital natives.

24/7 TECH

Millennials will be connected to the online world 24/7. In fact, we have already seen the likes of Pharrell create a 24 hour

video for his song 'Happy', which seems like a good representation of our always-on culture. Always-on doesn't just extend to being online 24/7. It also represents 'FOMO', or Fear Of Missing Out. Because everything is so accessible, Millennials now know about more events/parties/pop ups than ever before, so therefore they know the ones they are missing out on. Fashion brand Burberry created '24 hour Burberry' on Snapchat, which allowed Millennials to see their SS16 creations for 24 hours only, the day before the live catwalk. This created a sense of urgency to view the items before they were gone forever into the Snapchat-osphere. Millennials are searching for more location based items. In fact, the search 'near me' has increased 34 times since 2011.

'NO'WNERSHIP//

Millennials are part of an interesting shift in the way we get access to products and services. We can now rent/hire services in an instant, at our fingertips. Consider Spotify. Fifteen years ago, you would walk into someone's house to see shelves of CDs. Today, you walk into someone's house, and see that space being used for a single iPad and a Sonos speaker set. Today, Millennials have access to 20 millions songs on Spotify, and they do this by effectively renting the songs through a subscription service. The idea of renting, or 'no ownership' stretches from songs to cars. It is believed that in 5 years, Millennials won't buy cars, instead they will rent them from services such as ZipCar, so they can use them at their own convenience. This all forms part of the sharing economy – we don't own goods, such as music, anymore, we rent them. The result of this, is that Millennials now expect to be able to get what they want, and whenever they want it, otherwise known as instant gratification. So this generation knows that they can get their make up done within an hour of realising this needs to be done (check out Blow LTD. if you are interested), and they can put their room up for rent within 10 minutes after deciding to go on holiday for 3 weeks.

This has led to Millennials having a fairly carefree mindset - they know they can solve a problem in an instant, so long as there's an app for it.



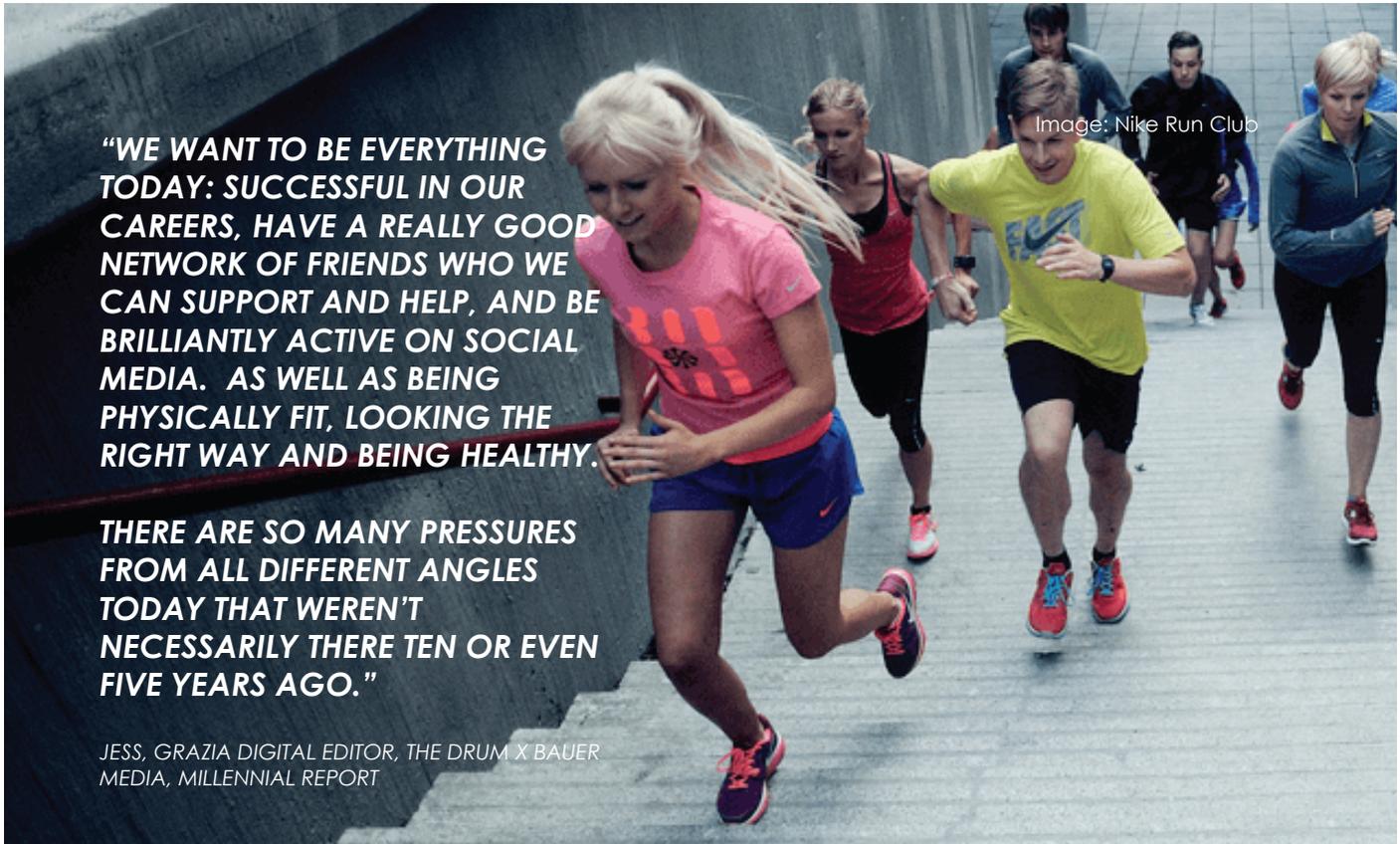


Image: Nike Run Club

“WE WANT TO BE EVERYTHING TODAY: SUCCESSFUL IN OUR CAREERS, HAVE A REALLY GOOD NETWORK OF FRIENDS WHO WE CAN SUPPORT AND HELP, AND BE BRILLIANTLY ACTIVE ON SOCIAL MEDIA. AS WELL AS BEING PHYSICALLY FIT, LOOKING THE RIGHT WAY AND BEING HEALTHY.”

THERE ARE SO MANY PRESSURES FROM ALL DIFFERENT ANGLES TODAY THAT WEREN'T NECESSARILY THERE TEN OR EVEN FIVE YEARS AGO.”

JESS, GRAZIA DIGITAL EDITOR, THE DRUM X BAUER MEDIA, MILLENNIAL REPORT

SUPERLATIVE NATURE //

Superlative means 'to the highest quality or degree'. This summarises the Millennial need for the best. To be the best, look the best, have the best. After all, they wouldn't share anything less than the best on social media for fear that it might damage their social status. According to Protein's article on 'Generation Risk', this audience will do what they can to get the jobs they want, or even create themselves new jobs, where they have seen demand for a service.

Technology is allowing our Millennials to be the best they can be. They can monitor their food intake, steps taken, what events their friends are going to, all just by looking at their phone (or their wrist if they are lucky enough to have a smart watch). They don't even need to worry about public transport any more, with apps such as Uber allowing them to travel with a private driver.

So our Millennials know that they can get what they want, when they want it. Apps are making day-to-day tasks easier, allowing them to be better at the things that they have to do themselves (instead of their apps), like be the best at their careers.

COOLBRANDS//



CHANEL



ALEXANDER MQUEEN



ASTON MARTIN



MILLENNIALS IN SUMMARY

Millennials are one of the most talked about generations of today. We know that they value experiences over materialistic things, but those experiences need to be shareable.

Millennials define themselves by their values, so if a brand can share those values, then they're on to a winner. Their lives are guided by technology, and new apps allow them to do things faster, and manage their busy social schedules - after all, they are aiming to be the best they can be. They don't own stuff, they rent it, and this leads to a fairly carefree attitude. Unlike Gen Z, they aren't thinking about the future so much, they are more in the now and living for whatever life throws at them.



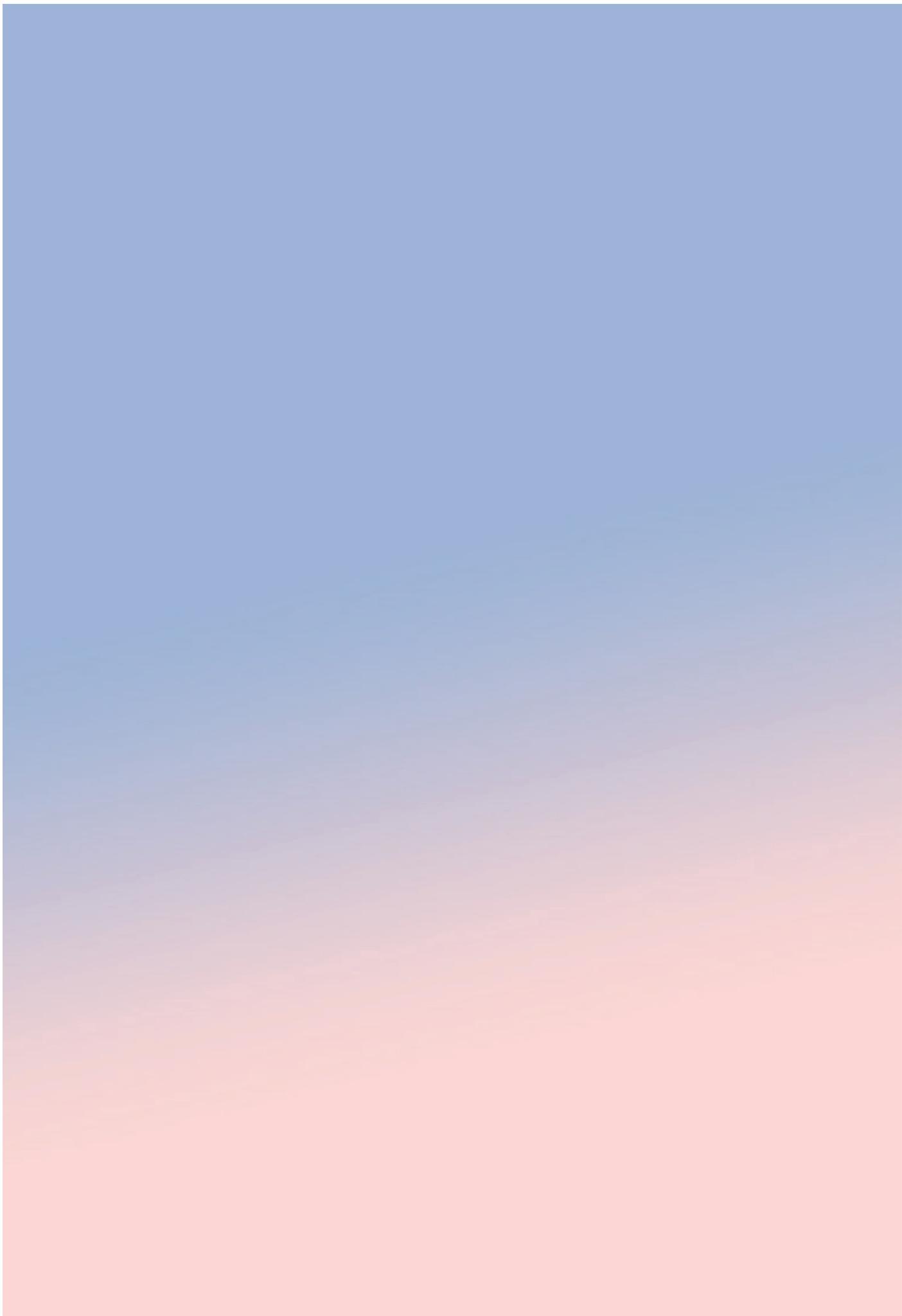




Image: M&S Leading Ladies

GEN X.

WHO ARE GEN X // ADAPTABLE //
WEARABLES // SHREWD SHOPPERS //
IMPROVED SHOPPING



Generation X were born between the early 60s and early 80s. What makes this generation unique is their **adaptability** to change. They were post-war babies, and so have grown up in an improving world, where they have seen major changes in technology.

They understand the differences that this technology can make, and do not take anything for granted. The recent evolution of wearable **fitness** tech has taken this cohort by storm.

Alongside all of this, we know that they are **shrewd shoppers**. They know where to get the best deals, and will happily shop around in order to make the most of their money.

ADAPTABLE // Generation X grew up in a time of change. They have experienced tech from rotary dial phones through to fingerprint-reading-all-encompassing smartphones. This has made them adaptable and responsive to changes in society.

On the other hand, living with this change has made them very savvy. They have seen the rise and fall of ideas, and brands adapting to the ever changing consumer.

ADAPTING TO WEARABLES // *“Six out of ten (59%) Gen Xers are planning to adopt some sort of wearable fitness tech in the next five years”*

FUTURE LABORATORY, RETAIL FUTURES, 2015

Generation X aren't just wearing wearables. They are talking about them online, suggesting that this tech means much more to them than you may first think. Sharing your fitness regime and how healthy you are is now on-trend. According to a report by Outdoor Industry, Gen X are using wearable fitness tech to monitor performance, stay ahead of issues and manage their health and well-being. This generation did not grow up with mobile internet, and so they can really see the benefit that these devices are making. Devices such as Fitbit and Jawbone are assisting Gen X to count their steps, to ensure they're doing enough every day, whilst devices like Spire are tracking breathing patterns, enabling users to reduce stress and anxiety.

What does this mean for brands? Health and wellbeing is top of mind for our Gen Xers, so consider what health benefits you can bring to this cohort.

Outdoor Industry Association. (2014). WEARABLE TECHNOLOGY: Changing Outdoor Behaviors Bring New Opportunities.p24 - 26.



Fitbit device

Image: Fitbit



Spire device

Image: Punchkick



John Lewis

Image: Retail Week



Waitrose Swindon is leading the way with tech

Image: Retail Week

SHREWD SHOPPERS //

Generation X are known to be cynical. Having grown up in an age of change, they have seen ideas rise and fall, so are familiar with those that work and those that don't. This has meant that when it comes to parting with their hard earned money, they will do so with caution.

According to a report by the Future Laboratory, they take a 'high low' retail strategy. This means shopping around for items. So going to Waitrose to buy food for when guests come over, but sticking to Morrisons for things like milk and bananas. Or even going to Primark for basic clothes, and to Hobbs for something a little more special. Our Gen X shoppers know exactly what they are buying in to, so transparency is key with these consumers. For example, when purchasing a cheap top from Primark, they know that this cheap price comes with a caveat that the item may only last a few months.

IMPROVED SHOPPING //

Our shrewd shoppers are open to technologies that will improve their shopping experience.

John Lewis have hit the spot when it comes to finding a balance between digital and physical shopping. They introduced click and collect shopping back in 2008, which now sees 6 million orders a year, compared to only 350,000 when it first started, despite charging £2 for orders under £30 from July 2015, proving that it is an invaluable phygital service to its Gen X consumer base.

John Lewis's 'How We Shop' report from 2015 talks of how consumers are less about "I need it now" and more about "I need it how, when and where I want", a phrase that is typical of Gen X. Waitrose are in talks of rolling out a device called 'Hiku', that allows the user to scan the barcodes of items that already exist at home in order to add them to a shopping list, ready for ordering. This will create greater loyalty to products as the consumer can only scan products that they already have at home. Sainsbury's have been testing a new app this year with Nectar card holders - the app will allow consumers to add items to a shopping list on their mobile. When they get in to store, their app will tell them where to find their items, which they can scan with their phone. At the end of their shopping trip, all they need to do is pay for the items they have scanned with their phone, therefore skipping the queues at the checkout.

It is services like this that are playing to Gen X's needs to get the best out of their shopping trips, for the best deal, and in the best place.

GEN X IN SUMMARY

Gen X are our oldest cohort of this zine, and probably the most savvy. They have grown up seeing ideas come and go, fail and succeed, so they know what works and what doesn't. Furthermore, they know what works best for them when it comes to shopping. They are happy to seek out bargains for everyday items, but will happily pay a little more for things that stand the test of time. They are predominantly users of Facebook, and will happily share their steps taken in the day from their Fitbit device (so long as it's a high count). Gen X are ones to watch - they will part with their cash for a product that improves their health and wellbeing, and is given to them at the right place and right time.



