

# backlash culture

**BACKLASH BRANDS**

**E-MOTIONAL  
ECONOMY**

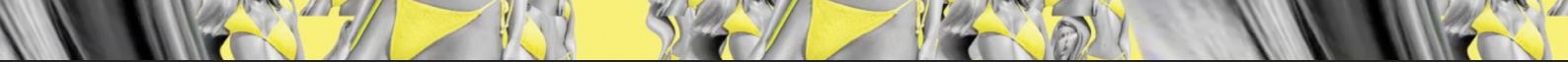
**GEN VIZ**

Isn't the customer always right? Wrong.

For too long brands have pandered to popular sentiment and tried to be all things to all people. As we enter the second half of the Turbulent Teens, the rose-tinted and collaborative vision being peddled by Silicon Valley acolytes feels increasingly out of synch with the genuine consumer experience. A bold vision and a combative stance will now take you further than open-sourced blandness.

Backlash Culture will help you to create a brand positioning that is uncompromising and directional, rather than just collaborative and conversational. It will enable you to challenge consumers with your brand proposition and create direct relationships that stir up complex emotional responses. And it will allow you to reject the minefield of political correctness in favour of a take-it-or-leave-it communication strategy.

The report covers the key new macro trends affecting the future consumer that are set to affect your business over the next 5–10 years. We then provide a toolkit to help you manage risk and focus on the initiatives that will lead to social, environmental and economic growth.



**backlash  
culture**

# **BACKLASH BRANDS**

**IS THE CUSTOMER ALWAYS RIGHT?  
IT'S AN ADAGE THAT IS OVER 100 YEARS  
OLD, BUT THIS CREED WAS NOT BUILT  
FOR THE TECHNOLOGICAL ERA,  
WHEN PUBLIC COMPLAINTS ARE  
ONLY A CLICK AWAY, AND ONE SMALL  
TWEET CAN TURN INTO A SWIRLING  
TWITTER STORM.**

# DRIVERS



## THE BACKLASH MENTALITY IS DRIVEN BY THE CURRENT POLITICAL, SOCIO-CULTURAL TENSIONS THAT EXIST ACROSS THE GLOBE.

### THE AGE OF PROTEST

We are living in an age of protest, when people take to the streets to protest against governments and to Twitter to protest against brands.

This tendency to protest has been made possible by the increased access to the internet, and the ability to take out one's frustrations immediately online. 'People everywhere seem to be morally aroused,' Dov Seidman, author of *How: Why HOW We Do Anything Means Everything*. 'It's like we are all in a crowded theatre, making everything personal – we are experiencing the aspirations, hopes, frustrations and plights of others in direct and visceral ways.'

### SCANDAL SOCIETY

Like members of a global militia of righteousness, consumers stand poised to attack. It is an unsurprising mentality given that brands have repeatedly shown that they are not to be trusted.

The 2015 diesel emissions-fixing scandal was especially damaging for Volkswagen because of the company's global reputation as a trusted brand. In the first quarter of 2015, Volkswagen was one of the top-selling cars in the UK, according to the Society of Motor Manufacturers and Traders, but by November, two months after the emissions story had broken, its sales had dropped by 20%.

### GROWING PAINS

Brands are eager to portray visions of a perfect world in their advertising. 'In ads, people are always happy, healthy and living a life to be admired,' says Jason Chambers, an associate professor of advertising at the University of Illinois.

But look at any newspaper and you'll see the reality of terror attacks, racial slurs and gender biases. Advertising firm Badger & Winters, for instance, showed the reality of sexism in much of mainstream advertising with its video, *We Are #WomenNotObjects*.

In presenting a vision of Innovator and Early Adopter futures, we can often gloss over the growing pains in the Majority.

Piaule, New York

**AGAINST THIS  
TUMULTUOUS BACKDROP,  
SOME BRAVE BRANDS  
ARE CHOOSING TO  
EMBRACE THE NEGATIVE  
BY TAKING A STAND AND  
OCCASIONALLY CAUSING  
A STIR.**

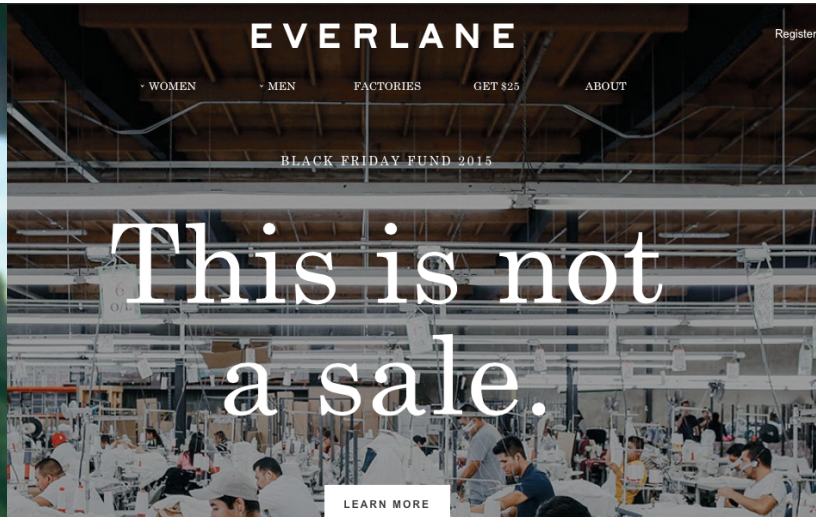


Vitsoe store, New York

# IMPACTS



Squatty Potty advertisement, 2015



Everlane website

## CONTROVERSY-COURTING

Some brands are choosing to face down consumer complaints with contentious campaigns.

Squatty Potty's online ad *This Unicorn Changed the Way I Poop* was vetoed by the company's investor and some co-founders, but co-founder Robert Edwards went ahead with the potentially offensive spot anyway. 'The kinked colon is a large part of our message. We stuck to it in this ad,' Edwards tells LS:N Global.

The advertisement has attracted millions of YouTube views, with the entire process medically explained. According to Edwards, the ad led to a 300% year-on-year increase in revenue in 2015.

## RIGHTEOUS RETAIL

It has long been part of a retailer's DNA to do exactly what the customer wants, but now some retailers are in a less giving mood.

Outdoors brand REI announced it would close all 143 of its stores on Black Friday and encourage its employees and customers to #OptOutside and spend the day exploring the outdoors, rather than standing in queues.

Homewares company Piaule is only launching one item at a time, beginning with a simple white towel, in a bid to persuade its customers to slow down their consumption.

## DICTATORIAL DINING

Restaurateurs and chefs are altering the relationship between themselves and their diners, making changes to the menu and service despite repercussions.

In October 2015, the Union Square Hospitality Group, which has 13 bars and restaurants in New York, announced that all of its establishments would eliminate tipping in the next year.

Eliminating the à la carte menu is another way that restaurants are dictating the rules when diners enter their establishments. At Australian restaurant Lûmé, customers are treated to a tasting menu of between 18 and 20 courses, the contents of which remain a mystery until the end of the meal.

Tate Britain campaign  
by Grey London, UK

You're a gay man.  
Sex is still a punishable offence.  
Love perhaps feels the same way.  
You describe obsessive love as something  
you wouldn't wish on your worst enemy.  
The day before your first Tate Retrospective  
your partner is found dead,  
probably from alcohol.  
History mockingly repeats itself.  
Nearly a decade later, just before your  
Retrospective at the Grand Palais in Paris,  
your next partner is found dead from  
overdose in your hotel room.  
You are a racist bohemian.  
'Triptych - A Study for '72' is a painting that  
follows this torture.  
You don't paint studies of flowers in a vase  
and you aren't going to start now.

See 'Triptych - A Study for '72' by Francis Bacon.  
BP Display in the Tate Britain.



# AS BRANDS BEGIN A BACKLASH OF THEIR OWN, COMPANIES ARE CHOOSING TO GO AGAINST THE SYSTEM AND FORCING CONSUMERS TO OPT IN TO THEIR BRAND.

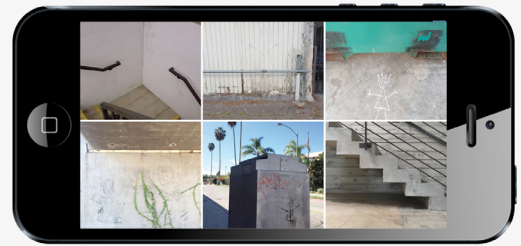


Vitsoe store, New York

# CONSEQUENCES



Burberry SS16 fashion show, London



ANTIdiaRY by Rhianna and Samsung, Global

## CLOSED DOOR POLICY

Some fashion designers are going rogue – not against the consumer, but against the industry’s endless seasons, which are increasingly seen as untenable.

In the US, designers Jack McCollough and Lazaro Hernandez of Proenza Schouler went against the seasonal fashion schedule by previewing their pre-autumn 2016 collection to a small group of press in New York in December 2015, but banned outside photography or reviews until the clothes and accessories hit the stores in spring 2016.

‘The system doesn’t make so much sense any more,’ says McCollough.

## OPT-IN CULTURE

While consumers are used to checking the opt-out button to avoid unwanted communications from brands, some brands are forcing their fans to opt in if they want to get involved.

Everlane recently opened a private Instagram account, @EverlaneStudio, which will only accept up to 100 followers a day. The account will post products that are in development and both act as a focus group and a space for Everlane’s loyal followers. ‘We’re making it private in order to have a curated, high-value experience,’ says Red Gaskell, head of social media at Everlane. ‘People will feel like they’re in on something.’

## AGGRO-TISING

Unafraid of any potential backlash, brands are creating aggressive campaigns that powerfully relay their message.

Yoghurt brand Chobani has landed in legal hot water over its print and television campaign for its Simply 100 line of Greek yoghurt. Chobani challenged competitors Danone and Yoplait in its adverts for including ingredients such as potassium sorbate, which it said is ‘used to kill bugs’, and sucralose, which it claimed has ‘chlorine added to it’.

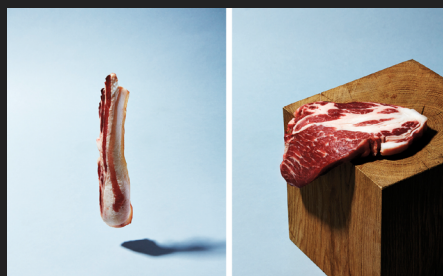
By taking a potentially slanderous stance, Chobani bravely aligns its beliefs with the current zeitgeist of knowing what is in your food – despite the risk of prosecution for libel.





Tetra online store founded by  
Monica Khemsurov, Su Wu  
and Eviana Hartman, US

**AS WE CONTINUE TO  
NAVIGATE THE TURBULENT  
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NOT NECESSARILY ALWAYS  
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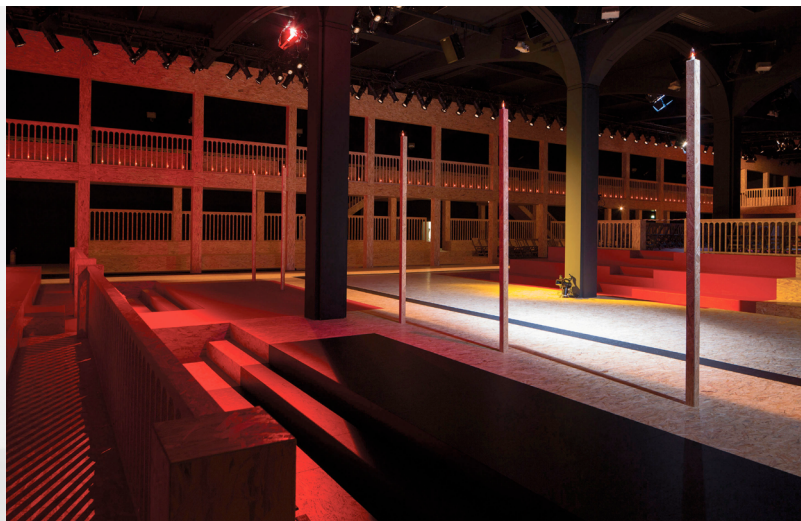


Viande & Chef campaign, Paris

# FUTURES



Space Suit by Yohji Yamamoto and Y-3 for Virgin Galactic's SpaceShipTwo, New Mexico



OMA Prada FW16 menswear show, Milan

## ANTI-CHOICE ARCHITECTURE

Giving the consumer an abundance of choice may become a thing of the past as brands impose their own point of view on consumers, with a take-it-or-leave-it attitude, leaving no option.

'We are moving from a moment of excessive choice – when brands were embarrassingly getting down on their knees asking 'buy me, buy me' – to brands stepping back a bit,' says Margot Hauer-King, strategic consultant at Brand Union. 'For a while consumers have pushed and pushed, and brands have given them what they wanted. But now brands are reining back the power and taking control of the choice architecture.'

## REPLY AND DEMAND

The rise of online review culture often makes companies feel they have to tiptoe around consumers' demands, but more retailers will decide to empower themselves and respond to negative reviews in kind.

In York, after a disgruntled customer left a one-star review of a café because she was charged £2 (\$2.87, €2.64) for a cup of hot water with a slice of lemon, the manager wrote a lengthy reply explaining the exact cost of that cup, including the waiter's time as well as the overheads of running a business.

## GROUND ZERO BRANDING

At the core of Backlash Brands is sticking to your message, whether or not it is alienating to some consumers. If a brand moves so far away from that, or waters down its message by continually apologising, it may be time to reset the clock.

In February 2016, Chipotle closed nearly 2,000 locations in the US for one day to discuss the fall-out from its E.coli and Norovirus outbreaks. The brand plans to launch a new campaign to win back customers, following a call by critics of the brand to focus on safe, rather than just fresh, food.

# TOOLKIT

**NOW IS THE TIME FOR BRANDS TO REMIND THEMSELVES OF WHO THEY ARE AND WHAT THEY STAND FOR: TO NOT BE WATERED DOWN, BATTENED DOWN OR REDEFINED BY CONSUMER VOICES. THE FEAR OF CAUSING OFFENCE HAS MEANT THAT BUSINESSES RISK BECOMING BLAND PROPOSITIONS.**

## **BITE BACK**

- : It is time for brands to get a backbone and stand up for who and what they are, and accept that the customer is not always right
- : Stand your ground. Don't be timid. At a time when apology is the default position, be bold and stare your consumers in the face with confidence and conviction
- : Make your point of view your point of difference

## **GO BEYOND WHY**

- : Be ready to answer the 'how'. With more globally shared narratives, the 'why' risks becoming undifferentiated among brands and businesses
- : Don't underestimate the importance of your internal operations, value chain and systems to add emotional value for consumers

- : Ignore the known inherited wisdom in your category. Imagination is more important than knowledge. Consumers are limited only to what they know and understand today, and brands are in a position to challenge the future

## **REBUFF CHOICE**

- : Embrace the idea of less is more. Limiting choice may be the best thing you can do for consumers
- : Brands must move towards more progressive ideals of how and what they do as businesses to transform mere product skus into precious objects of desire
- : Be clear about who your core target audience is and use your unique point of view to be the voice of reason that helps to edit moments of excess

## **BE ANTI-SOCIAL**

- : Always remember that technological advancements are tools, not imperatives. Don't let Twitter redefine who and what you are
- : Brands should take control and use social media as an editing tool. Listen to how people digest your products and services to decide whether they are the consumers you want to attract
- : Challenge your audience and make them feel uncomfortable. As people engage more openly with social and political topics, brands can reach consumers with controversy and discourse in a proactive way and with positive benefits

# BEST IN CLASS

1

## PROTEIN WORLD

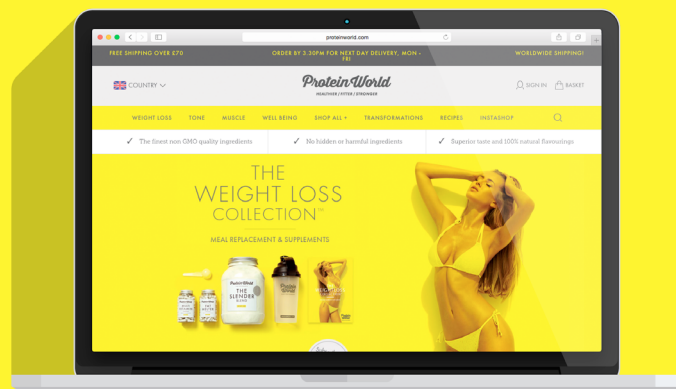
Protein World knows how it feels to be hated. The brand is unlikely to have predicted the level of sheer vitriol its Are You Beach Body Ready ad would generate, but instead of being beaten, it embraced the backlash in the most effective way possible.

Some 70,000 people signed a petition calling for the campaign posters to be removed on the grounds that they were sexist and promoted an unrealistic body image. Despite this, Protein World considered it a successful campaign and claimed it gained the brand 5,000 new customers in four days and tripled its sales.

On Twitter, the brand stuck to its original message and encouraged dialogue among its core demographic. Its first tv campaign continued in a similar fashion, showcasing a parade of beautiful models and featuring the tagline 'New Year New You'.

Are You Beach Body Ready? campaign, Protein World

Protein World website



**ALTHOUGH ITS CONTROVERSIAL APPROACH MAY APPEAR DISTASTEFUL, PROTEIN WORLD'S CAMPAIGN STANDS OUT FOR ITS STRATEGY OF ALIENATING SOME WHILE ATTRACTING THE INTEREST OF OTHERS.**

2

### TATE BRITAIN

Up until November 2015, Tate Britain’s marketing output was standard museum fare, for example, an image of a famous painting accompanied by a short invitation.

Its collaboration with Grey London radically transformed its approach by removing all visual cues and presenting commuters with detailed copy that describes a piece of art and ruminates on the artist’s state of mind. Small type set against a grey background encourages people to engage with the copy and leaves them wanting more.

‘By drawing people in and forcing a reappraisal of artworks they think they know, the ads compel people to visit Tate Britain and see the artworks for themselves,’ explained Grey London.

Tate Britain campaign by Grey London, UK

Grief has never looked so beautiful.  
Quite a paradox, as surely it must be the  
hardest emotion we have to bear.  
It is said the only way out of grief is through it.  
Otherwise it can hold us in depression or  
send us into a madness that can take lives.  
Even in death Ophelia is held by grief  
as firmly as her heavy dress holds her in water.  
The haunting subject makes  
this painting an unlikely favourite.  
In postcard form it remains far and away  
Tate Britain’s biggest seller.

See ‘Ophelia’ by Millais.  
BP Displays. Free at Tate Britain.



Selfies showing us living the dream.  
We show the world only  
what we want the world to see.  
The right setting,  
the best angles,  
wearing the latest fashion.  
Maybe true for you.  
Certainly true for celebrities.  
And it’s long been true for royals.  
The earliest full body portrait  
of the ‘Virgin Queen’,  
Elizabeth I,  
is portrayed with a body ideal  
that would break the internet.  
There are no shadows.  
Like wrinkles,  
aren’t they for ordinary folk?  
Elizabeth couldn’t  
take a selfie in 1563  
but if she could,  
it would look like this.  
If you like likes  
or shares,  
come and take a selfie  
with the Queen of selfies.  
Queen Elizabeth I.

See ‘Portrait of Elizabeth I’ British School.  
BP Displays. Free at Tate Britain.

**BACKLASH BRANDS ARE ADOPTING AN ALOOF ATTITUDE WHEN IT COMES TO CONSUMER INTERACTION, CHOOSING TO LET THEM OPT IN TO THEIR SERVICES RATHER THAN OVERLOAD THEM WITH RELENTLESS COMMUNICATIONS.**

## 3

**CHOBANI**

The boldest move a Backlash Brand can make is to face its competitors head on. Greek yoghurt brand Chobani pulled no punches in its Simply 100 campaign, which called out competitors Danone and Yoplait for their use of ingredients such as sucralose, which has the same chemical compound as chlorine, and potassium sorbate, a preservative that is also found in insect repellent.

There is significant risk involved in taking such a bold strategy. Following the campaign, Chobani's competitors accused the brand of false advertising and took legal action. The ads were later removed, but the brand remained steadfast in its principles.

'Today, we are asking food makers across the country to join us in only using natural ingredients. If we can give people more information and help other food companies make better food, everyone wins,' the brand said in a Twitter post.

Chobani Simply 100 advertisement, 2016



Refers to nationally distributed brands



**CHOBANI'S AGGRESSIVE APPROACH TO DIFFERENTIATING ITSELF FROM COMPETITORS GOT IT NOTICED. AND WHILE THEY FACE LEGAL RAMIFICATIONS, EVEN IF THEY STOP RUNNING THE ADS, THE IMPACTS – AND IMPRESSIONS – HAVE ALREADY BEEN MADE.**



**backlash  
culture**

# **E-MOTIONAL ECONOMY**

**AS RAISED PERSONAL AWARENESS  
PERVADES PEOPLE'S LIVES, CONSUMERS  
ARE BECOMING OBSESSED WITH HOW  
EVERYTHING MAKES THEM FEEL. IN THE  
NEW ERA OF EMO DIVERSITY, BRANDS  
THAT DESIGN MEMORABLE, POIGNANT  
AND SURPRISING EXPERIENCES WILL  
WIN BY INCREASING A SENSE OF DEEP  
AUDIENCE CONNECTION.**

# DRIVERS



## THE EMPHASIS ON EMOTIONS IS DRIVEN BY BROAD ATTITUDES THAT HAVE EMERGED ACROSS MULTIPLE SECTORS OF CULTURE, SOCIETY AND TECHNOLOGY.

### THE POST-POLARITY SPECTRUM

In The Polarity Paradox, people fled to temporary states of emotional extremism. Following an overdose of dramatic single-note experiences, a new reactionary mood means people now want to experience a more nuanced spectrum of emotions – plus entirely new ones.

More than ever, people are searching for ways to get in touch with all of life's emotions. For brands this means moving beyond the obvious to build content and experiences that enable their customers to explore the niche and the various, and connect with complexity.

### THE OPTIMISED SELF

The blending of wellness and pop psychology has made wellness a blossoming lifestyle industry with which we have become familiar. The consumer health market will be worth £512bn (\$737bn, €675bn) by 2017, with 1.7bn tablets and smartphones hosting apps for monitoring wellbeing, according to Accenture.

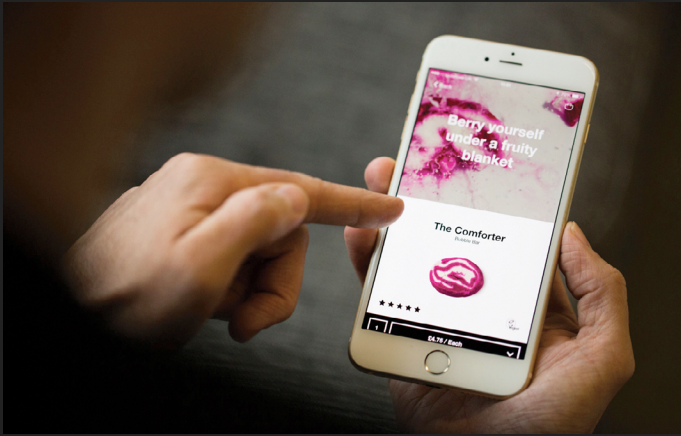
Companies such as US food brand Dr Smood, whose tagline is Smart Food for a Good Mood, now use the language of mind-body wellness. Goldman Sachs is in conversation with the brand's founders to look at how mood-enhancing nutrition could influence the workplace.

### HUMANISED TECH

The first wave of digital life was flat, but now it's 3D, sensorial and interactive. We now find it normal to conduct the most intimate areas of our personal lives via our phones and laptops.

At the start of 2016, Andrew Moore, the dean of the School of Computer Science at Carnegie Mellon University, said this year would be the moment when machines begin to grasp human emotions. The evolution of our own minds is now not only being understood, but boosted by technology.





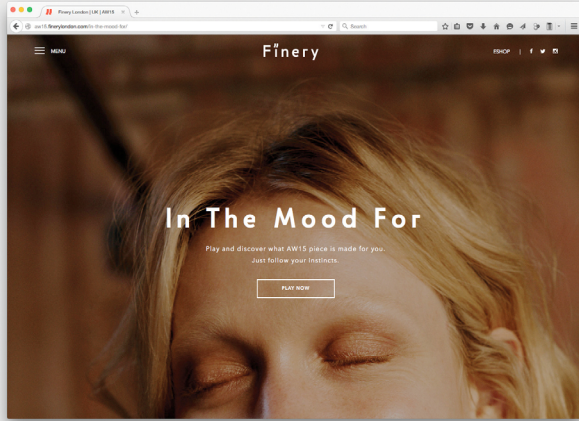
Lush app

**THESE CONTEXTS ARE  
GIVING RISE TO A NEW  
SET OF EMOTION-CENTRIC  
APPLIED TECHNOLOGIES,  
COMMUNICATION  
TECHNIQUES, PRODUCTS  
AND COMMERCIAL SPACES.**



Lightwave emotion measurement  
for The Revenant

# IMPACTS



In the Mood for by Finery



Hermèsistable by Hermès

## EMOTIONS IN FOCUS

15 newly identified emotional categories, known as compound emotions, blur the boundaries between things we have polarised as happy or sad. These compound emotions are conveyed by the facial muscles we use to express each feeling, and computers can now read these and respond appropriately.

Boston-based artificial intelligence (AI) company Affectiva, a leader in facial recognition technology, has developed software that responds to a frown and laughs alongside you. Realeyes, Sension and Beyond Verbal offer similar services, and Emotient, bought by Apple in January 2016, sells software to advertisers to assess viewers' reactions.

## EMOTIONAL DATA COLLECTION

Websites already know how you feel. And so do the brands buying their data.

Using facial-recognition software, M&C Saatchi's smart poster can measure the strength of different ads and filter out weaker ones to develop highly effective campaigns. Emotional data isn't just being gathered via your face, but also from your fingertips.

San Francisco-based bioanalytics company Lightwave joined forces with 20th Century Fox for the launch of The Revenant to monitor audience engagement with the film based on viewers' physiological responses, such as heart rate, electrodermal activity and motion.

## MOOD RETAIL

Brands are capturing emotional data to make recommendations and products are being organised by the emotions they elicit.

Finery womenswear launched a A/W15 microsite that customers browse by feeling.

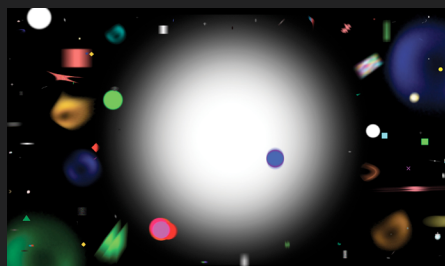
Hermès' Hermèsistible platform, launched in November, explores ways of expressing the feelings around desire.

UMood by Uniqlo makes recommendations based on reactions to stimuli. Customers don headsets in-store to measure responses. The tech then suggests the perfect shirt based on customer mood.



Still from Wet Sounds  
by Tanja Busking

**THESE INNOVATIONS NOW  
INFORM HOW ADVERTISING  
AND BRAND LANGUAGE  
REACH OUT TO CONSUMERS  
IN THE LATTER HALF OF  
THE TURBULENT TEENS, AND  
EVEN HOW DESIGNERS  
FORGE THE FUTURE OF  
BESPOKE PRODUCTS.**



Condition Black experiment  
by Vollebak

# CONSEQUENCES



Baker Miller Pink hoodie by Vollebak



Still from Vintersaga, by Forsman & Bodenfors for Volvo

## COMPOSITE MOOD MESSAGING

With compound emotions comes compound brand DNA. Jens Skibsted, member of the Global Agenda Council on The Future of Cities at Davos, says: 'Owning a basic emotion has become a given. It's about adding different senses to the experience. Now, your USP means your unique way of layering.'

Volvo sets the example with its Vintersaga campaign, playing with the Swedish word *vemod*, which roughly means melancholy tempered with optimism. Samsung's See More, Feel More ad also taps into the consumer desire for emodiversity, emphasising the emotional range that can be felt watching HD content.

## CONVERGENT COMMS

The ASMR YouTube channel has more than 300,000 subscribers. ASMR refers to Autonomous Sensory Meridian Response, defined as 'a perceptual phenomenon characterised as a pleasurable tingling sensation in the body in response to visual, auditory, tactile, olfactory or cognitive stimuli'. The first ASMR ad was released on the Chinese market promoting Dove chocolate.

The Waldorf Project layers theatre, art, choreography, design, music, food and drink. Lead artist Sean Rogg says of *Futuro* (2016): 'All disciplines will be engaged and interwoven to give guests a complete emotional journey.'

## SUBCONCIOUS BESPOKE

Copenhagen Business School conducted a study in which subjects were shown brand names before subsequently being shown an item of clothing. 'Even when we show people brand names like Gucci or H&M for less than 50 milliseconds, there is an emotional response', explains Dr Thomas Zoëga Ramsøy, co-author of the report.

Taking this idea that subconscious consumer reactions hold the key to better product personalisation, designer Merel Bekking is working with Neurensics in Amsterdam to research the development of people's ideal product based on MRI scans of their brain.



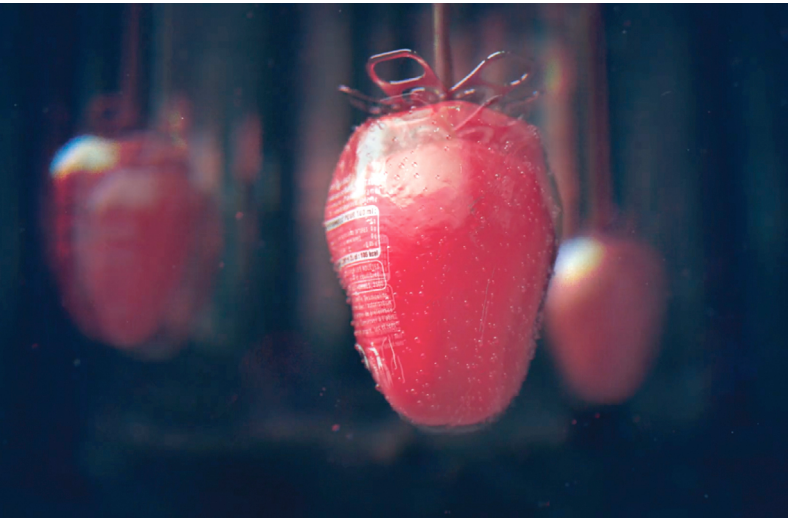
Geist.xyz by Zeitguised, Berlin

**AS WE LOOK AHEAD,  
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Light Spirit by Friends With You  
during Design Miami/Basel,  
December 2015

# FUTURES



Still from Branded Dreams: The Future of Advertising by Studio Smack, Amsterdam



The Reality Theatre by Allison Crank

## SHOPPABLE EMOTIONS

Through the meeting of technology and pharmacology, consumers will soon be able to tailor their emotions at will, as *The Optimised Self* finds new avenues.

‘Techniques for direct brain stimulation have made it possible to write information into single neurons,’ says head of Imperial College London’s Tech Foresight Practice Alex Ayad. ‘At the moment data transfer rates are still slow, but this could increase to reach broadband speeds by 2045. The range of human perception could then expand. One can foresee a virtual marketplace for trading high-quality emotions.’

## CONNECTED THERAPY

We are already seeing the rise of apps that help people cope with their emotions. As the impacts of emotions analytics emerge, the personal wellness industry will use them to offer better care.

Art collective FriendsWithYou, which is set to have a children’s tv show on Netflix in 2017, exhibited the *Light Spirit* VR installation at Art Basel Miami Beach in December. It sought to reconnect people with themselves through ‘an experience that spans the gamut of human emotions’. The goal of immersing people was to ‘create an emotionally impactful memory that provokes mindful exploration’, according to the artists.

## DREAMTIME NEUROMARKETING

The potential of lucid dreaming for developing metacognition is triggering interest across the scientific and creative worlds.

At JW Goethe-University Dr Ursula Voss found that applying an electric current to the brain prompts lucid dreams and Dr Patrick Bourke at Lincoln School of Psychology conducted the first study showing the link between lucid dreaming and waking insight.

Inspired by this, Studio Smack created a short film showing a future in which neuromarketing lets advertisers access the subconscious during sleep.

# TOOLKIT

**BRANDS MUST RECOGNISE THE IMPORTANCE OF EMOTIONS AND ENGAGE WITH THE NEW DIALOGUE AROUND THEM.**

**WE NEED TO START PLACING VALUE ON THE FULL BANDWIDTH OF EMOTIONS, RATHER THAN ON THE OVERSIMPLIFIED EQUATION: HAPPY = GOOD, SAD = BAD. TECHNOLOGY CAN ALSO BE USED TO ENHANCE RATHER THAN REPLACE OUR FUNDAMENTAL HUMANNESS AND EMOTIONAL CAPRICIOUSNESS.**

## **EXPAND YOUR EMOTIONAL LEXICON**

- : Start using the language of mind, body and wellness to market products that historically have not come with emotional value attached
- : Acknowledge compound emotions, and embrace the fact that people can feel sad, happy, angry and frustrated at any one time
- : Become a champion for new emotions, especially for a visual generation that communicates beyond the conformities of written language and doesn't subscribe to traditional categories

## **CREATE MORE EMO-VALUE**

- : Organise your products and services according to the emotional response that they elicit, and use personal data to make more emo-based recommendations
- : Consider retail as part of the solution to consumers' complex internal lives by enabling them to browse by feeling and mood
- : Show that you understand that emotions are not simply a marketing tool. Foster deeper emotional intelligence in the workplace as greater empathy will lead to new ways to improve productivity and performance

## **USE TECHNOLOGY TO FOSTER EMPATHY**

- : Start to combine data with a deep knowledge of human biology, emotion and technology in your brand strategy
- : Brands need to be as good at reading emotions as analysing data. Businesses that can help consumers make decisions based on their heightened emotional senses will be the ones that thrive
- : Go beyond traditional brand tracking measures, and understand and improve on empathy to improve customer loyalty

# BEST IN CLASS

1

## VOLVO

The car brand continues to release moving ads that take viewers on complex emotional journeys and leave them feeling connected with the brand and its long-standing values.

Volvo's Vintersaga campaign, part of the brand's Made By Sweden series, plays with the Swedish word 'vemod', which roughly translates to a type of melancholy tempered with optimism that is distinctly Swedish in feel.

Through this, the brand creates a sense of meaning and human connection while retaining its established identity as a grounded company that people can trust.

Volvo XC60 lifestyle imagery

Volvo 'Made by Sweden' campaign  
by Forsman & Bodenfors, photography by Felix Odell



**CONSUMERS INCREASINGLY SEEK INNOVATIVE CONTENT ACROSS ALL FORMS OF MEDIA THAT ENABLES THEM TO EXPERIENCE DIVERSE AND NUANCED FEELINGS, AND CONNECT WITH BRANDS AND EACH OTHER ON A DEEPER LEVEL.**



2

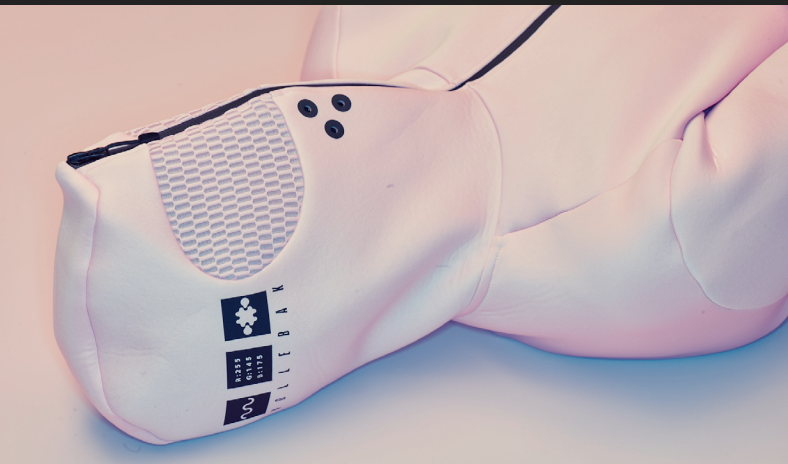
## VOLLEBAK

Founded by brothers Nick and Steve Tidball in 2015, the adventurewear label uses technology-led design in its products to influence the temperament of wearers before, during and after physical activity.

The brand's best-known product is a pale pink hoodie engineered to regulate the parasympathetic nervous system, while its Condition Black jacket, which features ceraspace panels that limit body heat loss and armour-like plating, is built for pure survival.

Finnish for 'all out', Vollebak's experiments sit at the intersection of psychology, exploration, history, colour theory, material technology, physiology and neuroscience.

Baker Miller Pink jacket by Vollebak



Condition Black jacket by Vollebak



**TECHNOLOGY-LED DESIGN INNOVATIONS THAT CREATE DIFFERENT EMOTIONAL STATES WILL INCREASINGLY FEATURE IN THE FUTURE AS CONSUMERS SEEK TO HEIGHTEN THEIR SENSES**

## DR SMOOD

Co-founder of Pandora René Sindlev began developing his mood-elevating food brand in 2012 to tackle poor nutrition among his employees. Framed in the language of wellness, Dr Smood taps into Optimised Self mindsets and highlights the link between mind and body.

The brand's holistic menu is built around six colour-coded pillars – immune, energy, general health, beauty, detox and super power.

Sindlev plans to open 50 stores in the US over the next three years, including seven locations in New York, and is in discussion with Goldman Sachs to examine the effects of his products on workplace productivity and happiness.

Dr Smood juice range, US



Dr Smood kale granola, US



**THE SHIFT TOWARDS EMO-DIVERSITY HAS ITS ROOTS IN THE OPTIMISED SELF MOVEMENT. THE HEALTH AND WELLBEING SECTOR IS A PERFECT FIT FOR THE NEXT WAVE OF EMOTIONALLY AWARE PRODUCTS AND BRANDING.**



**backlash  
culture**  
**GEN VIZ**

**TEENAGERS ARE NO LONGER  
SELF-ABSORBED SOULS STRUGGLING  
THROUGH PUBERTY. ABSTINENCE AND  
REALNESS ARE THE ORDER OF THE DAY  
FOR THESE NEW SOCIAL ACTIVISTS.  
SAY HELLO TO GEN VIZ, THE ULTIMATE  
EARLY ADOPTERS POWERING THE  
VISUAL-FIRST CULTURE OF TOMORROW.**

# DRIVERS



764 likes  
4m  
candaceparker Creating our own rules! 🍌🍌🍌



## HYPER-CONNECTEDNESS AND TECHNOLOGICAL INNOVATION HAVE DRIVEN GEN VIZ TO HAVE A HIGHLY VISUAL LEXICON, GLOBAL OUTLOOK AND HACKER MINDSET.

### VISUAL FIRST

Forms of communication that require longer periods of concentration are less and less relevant to Gen Viz. They are being replaced by highly visual formats.

In Vietnam, 47% of 13–21-year-olds prefer to express their emotions with stickers, emoticons and emojis rather than words, according to Epinion.

Twitter, with its ultra-short 140-character word count, has one of the lowest forms of engagement with this demographic. Just 3% of young teenagers aged 13–14 use the platform, according to Pew Research Center.

### CHILDREN OF THE WORLD

Members of Gen Viz are hyper-connected to a global network, and the most racially diverse of all generations. Hispanic, African-American, Asian and multiracial Gen Viz make up 47% of teens, according to a survey by the US Census Bureau.

The borders between these demographics are dissolving and a sense of freedom is emerging among teenagers. 'Transnationalism and layers of identity are becoming more common, particularly among the young,' says professor Ian Goldin, director of the Oxford Martin School at the University of Oxford.

### HACKER MINDSET

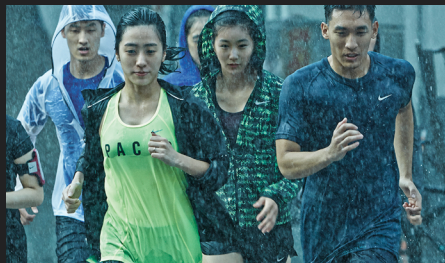
Teenagers have a DIY attitude to getting work done. Whether starting a business, coding a website or producing a video, they are doing it themselves. Some 52% use YouTube or social media for school research assignments, according to a study by Pew Research.

'I don't use one curriculum and I'm not afraid to look for shortcuts or hacks to get a better, faster result. It's a mindset, not a system,' explains Logan LaPlante, a 16-year-old hack-schooling advocate. Helsinki is already adapting to this behaviour by scrapping teaching by subject in favour of teaching by topic.



Break a Sweat campaign by Petra Collins for Adidas StellaSport

**TEENAGERS ARE EMBRACING  
THEIR CREATIVE SPIRIT,  
STANDING UP FOR CAUSES,  
COMMUNICATING FASTER  
AND PUSHING THEMSELVES  
TO BE STRONGER.**

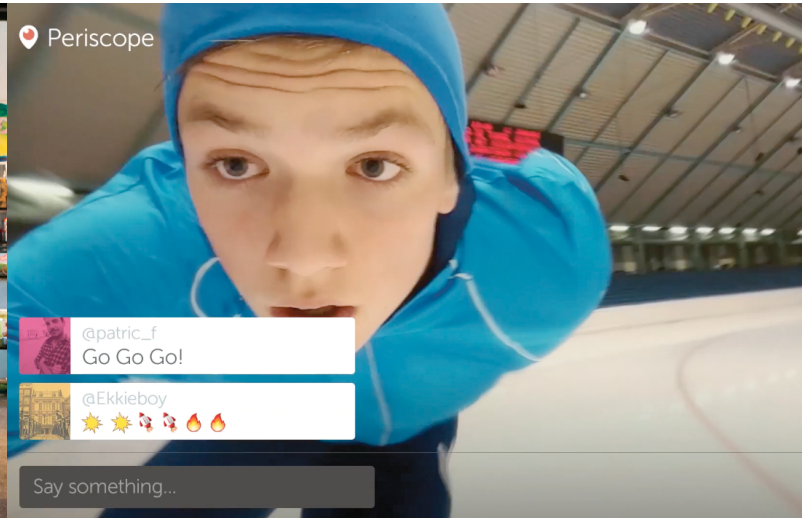


Just Do it Korea by Wieden + Kennedy, Tokyo

# IMPACTS



Your Story, New York



Samsung #TheOnlyWayToKnow campaign for the 2016 Winter Youth Olympics, Lillehammer

## INSTANT MESSENGERS

Short, spontaneous bursts of visual-first communications appeal greatly to Gen Viz. And a number of brands have been experimenting with how to capitalise on this.

In the US, Partnership for Drug-Free Kids launched an emoji-only anti-drug campaign with the slogan: Not Everyone Gets It, We Got You. 'The entire campaign was born out of a very simple idea: speak to teens in their language,' says Amanda Roberts, copywriter at advertising agency Hill Holliday. 'It just so happened that language was emojis.'

## BORN ACTIVISTS

Gen Viz are liberal and open, and they value socially conscious brands. Art Hoe, a teenage collective with more than 30,000 Instagram followers, creates a dialogue around gender and identity. Elizabeth Farrell, a 19-year-old climate change activist, uses her Instagram account to share provocative images that appeal to her generation's aesthetic sensibility.

BuzzFeed's day of content by and for its Muslim users on Snapchat perfectly encapsulates this socially aware attitude. 'We wanted to show appreciation for our Muslim audience, while exposing non-Muslims to authentic glimpses of their culture,' says Johnny Woods, producer at BuzzFeed.

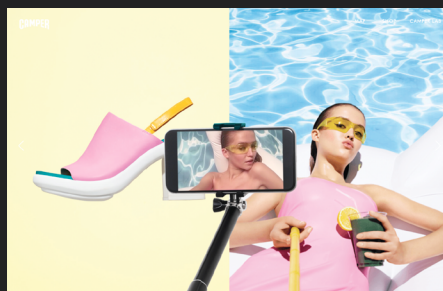
## HEALTH-CONSCIOUS

The prevalent shift of The Optimised Self is apparent in Gen Viz. Only 38% of 11–15-year-olds have tried alcohol at least once and 18% have smoked at least once, according to a 2014 NatGen survey – the lowest figures since the survey began in 1982.

Mobile brand Samsung engaged with this in its portrayal of powerful teen athletes, raising questions of self-doubt among the athletes, from ski jumpers to ice skaters and hockey players, as they prepared to compete at the 2016 Winter Youth Olympic Games.

Zora Sicher for Milk Makeup

**GEN VIZ NO LONGER PLACE  
AS MUCH VALUE ON BODY  
IMAGE. THEIR WORLD IS  
DOMINATED BY DIGITAL-  
FIRST NETWORKS, INCLUDING  
MULTI-PLAYER VIDEO GAMES  
– AND THEY’RE DEMANDING  
THAT SAME INTERACTIVITY IN  
THEIR EVERYDAY LIFE.**

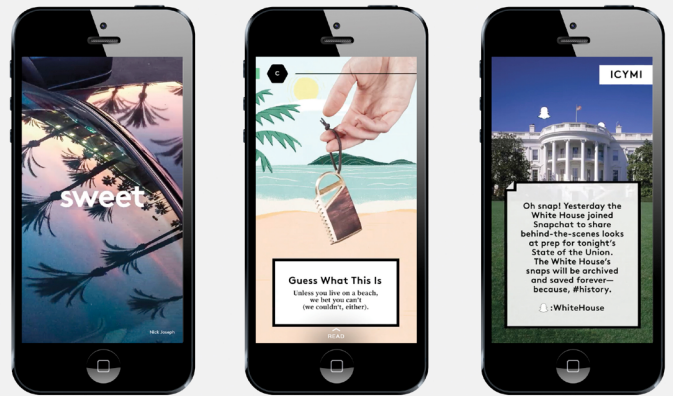


CamperLab's spring/summer 2016  
campaign by Romain Kremer and  
Convoy Agency

# CONSEQUENCES



OKgrl

Sweet Snapchat channel  
by Hearst

## POST-BODY MINDSET

Teenagers are rejecting traditional ideas of perfection in beauty and media. Traits they once tried to hide, such as being overweight, cross-eyed or geeky, are now being proudly displayed. ‘Social media, especially how I used it, isn’t real. I was miserable. Stuck. Uninspired. Angry,’ said 19-year-old Instagram model Essena O’Neill.

They have applied supermodel Cara Delevingne’s ‘embrace your weirdness’ rallying cry to their own lives. Beauty brand Milk Makeup understood this when it cast a diverse group of 40 ambassadors for a campaign that emphasised the beauty in originality and authenticity.

## GAME STATIONS

Video games are the new social networks for teenagers – they are the spaces in which friendships are created and romances blossom. ‘Games function like chat rooms. You stay for the social aspects, to play and chat with your friends,’ says game designer Nina Freeman.

Some 36% of Gen Viz expected to play more video games in 2015, according to Piper Jaffray. Verizon’s campaign with Minecraft cleverly tapped into this virtual reality by allowing players to make video calls and order food without ever leaving the game world.

## VISUAL SERENDIPITY

Gen Viz value interactivity in everything from magazines to retail and beauty. OKgrl, an online platform for teenage girls, enables users to play games, share images and scroll through fashion shoots. ‘We set out to create a new fashion platform that can match the entertainment levels the young generation already gets from apps such as Snapchat or Tumblr,’ explains Louby McLoughlin, founder and creative director of OKgrl.

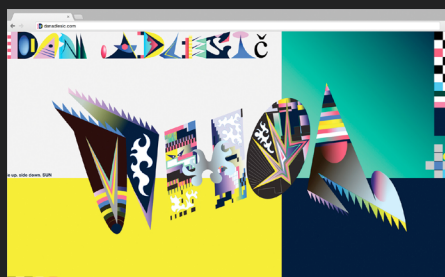
Similarly, Hearst Corporation’s straight-to-Snapchat magazine Sweet features brief articles and shoppable style advice for the scrolling generations.





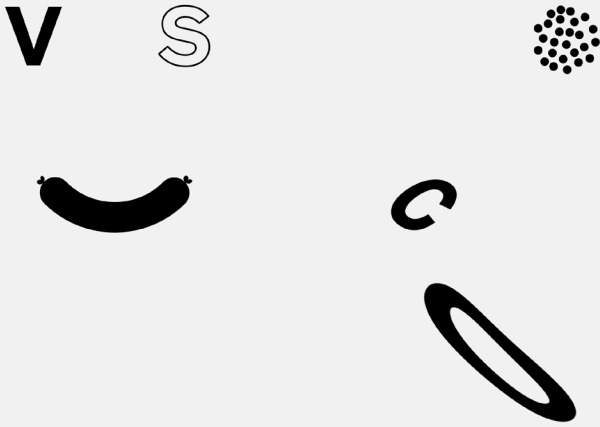
Don't Hug Me I'm Scared collection  
by Lazy Oaf, UK

**GEN VIZ IS AS MUCH  
A PSYCHOGRAPHIC  
MACROTREND AS A  
DEMOGRAPHIC ONE. ALREADY  
NEW TRENDS ARE EMERGING  
IN THE WORKPLACE, TRAVEL  
AND LEISURE INDUSTRIES.**



Dan Adlešič's portfolio site  
by Nejc Prah

# FUTURES



VSCO has developed a code-based language, produced in collaboration with Göran Söderström;

Museum of Future Government Services, Dubai

## LOGICAL CONNECTIONS

In the future Gen Viz will seamlessly connect with local tribe members and influencers. Some 57% of teenagers have met a new friend online and 26% would need to fly to see one of their online friends, according to Pew Research Center.

In Brazil, Sprite used Snapcodes for its RFRSH na Lata campaign to help people extend their social networks. Specific codes were assigned to 15 influencers and tastemakers to enable people to connect to them and their Sprite-related content. The campaign received 2.3m views in two days, according to CUBOCC, the agency behind it.

## OPTIMISED TEENS

Teenagers will also start to look for social experiences in sober atmospheres. Lik is a substance-free night out, where hangovers are a waste of time and dancing is the path to real ecstasy – a place in which healthy-minded people can come together and party.

‘It’s a reflection of what happens when you provide accurate information to teens. They can make informed decisions,’ says Dr J Deanna Wilson from Johns Hopkins University School of Medicine.

## FULL-TIME HACKERS

Envisage a future when human and machine processes are combined to increase productivity. Some 35% of all workers in the UK and 47% of those in the US are at risk of being replaced by technology over the next 20 years, according to research by the University of Oxford.

You have to stop thinking about education as you get a general education and then go into a profession and are stuck in it for the rest of your life,’ says Jerry Kaplan, serial entrepreneur and futurist. ‘You need to think of education as an ongoing process of re-education.’

# TOOLKIT

**A PICTURE SPEAKS A THOUSAND WORDS, AND NEVER MORE SO FOR A GENERATION THAT COMMUNICATES THROUGH VISUAL LANGUAGE ALONE. FORGET FACEBOOK OR TWITTER FOR GEN VIZ. LIVING IN A WORLD OF ATTENTION DEFICIT, VISUAL COMMUNICATION NEEDS TO CUT THROUGH AND GRAB THEIR ATTENTION.**

## **DON'T BE THE DAD AT THE DISCO**

- : The emoji is not the future. Look beyond fads to see the true power and immediacy of visual communications
- : Make live stream storytelling such as Periscope an essential part of your marketing arsenal. Telemetric platforms are interactive, responsive and relevant
- : Think laterally about media strategy and remember that this is not a one-channel-fits-all generation

## **CONSTRUCT NEW IDENTITIES**

- : Use digital tools and services to enable Gen Viz to connect globally and push further their personal journey of identity construction

- : Embrace a Whole-system Thinking approach and bring transparency to the products you offer, the way you run your business and the impact you have on the world around you
- : Use social media channels to champion causes that are close to your business and to Gen Viz hearts to show that you care too

## **START STRAIGHT TALKING**

- : Brands need to adjust their message to appreciate that members of Generation Z like to celebrate uniqueness and their imperfections, rather than hide behind Photoshop perfection
- : Embrace Anti-authenticity Marketing and try to articulate real values throughout your business by creating more complex storylines that appeal to these consumers

- : Don't be an everyman. Generation Z teens value people for who they are, and in turn value brands in the same vein

## **ADOPT A NEW MINDSET**

- : Be clean and conscious. Bucking the traditional teenage years, members of this generation are more in line with their 40something parents who are healthily eating their way into their futures
- : Give Gen Viz some privacy. This generation was born into social media and knows the pitfalls. They want to have fun, but without leaving a trail of embarrassing moments. Offer them fun but also allow them privacy
- : Smart brands will value their consumers and treat them as peers. Members of this generation value their liberal and open relationships and rely on peer-to-peer interactions

# BEST IN CLASS

1

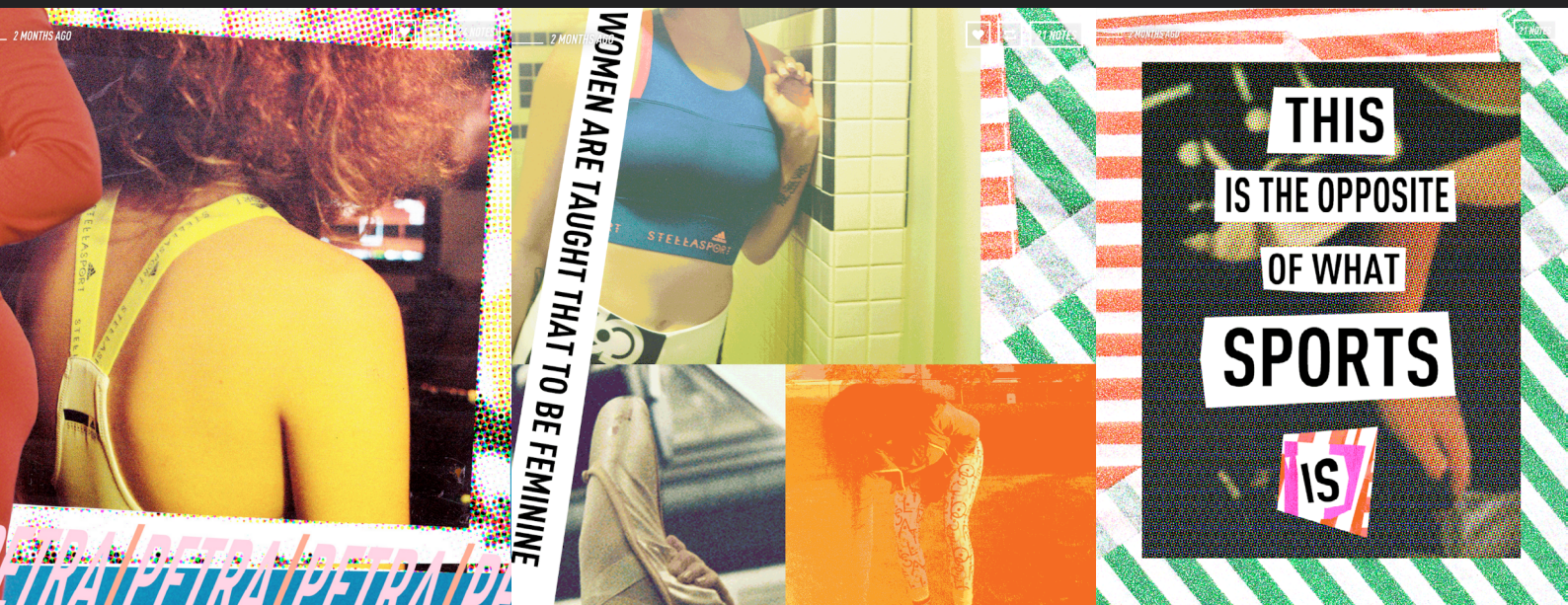
## BREAK A SWEAT

Artist Petra Collins teamed up with Adidas StellaSport to create a campaign that perfectly captures Gen Z's open-minded and liberal attitude.

Break a Sweat film by Petra Collins for Adidas

The film features a group of intelligent, healthy girls who are fighting to express who they are and who they want to be, from a ballerina to a football player to a hot yoga enthusiast. By representing a broad range of women with a diverse variety of interests, the brand challenges traditional notions of masculinity and femininity.

'Visibility is key in this era because we live in a world of images,' explains Collins. 'If you don't see yourself represented, you don't feel like you are part of a landscape. It's like you don't exist.'



**TODAY'S HYPER-CONNECTED TEENAGERS HAVE A GLOBAL PERSPECTIVE WHEN IT COMES TO SOCIAL CONCERNS SUCH AS ENVIRONMENTAL ISSUES AND LGBT RIGHTS.**

2

## CUTE OVERLOAD

OKgrl is a new digital platform for teenage girls that breaks all the traditional rules of publishing. Users can play games, paint on graphics, share images and scroll through fashion shoots on a website designed to emulate the feel of an app.

Founder and creative director Louby McLoughlin teamed up with Kenzo's former digital art director DVTK to produce an interactive experience for a generation known to rapidly scroll and click through editorial content. 'We would rather do a video than write 1,000 words,' says McLoughlin.

OKgrl by Louby McLoughlin



**GENERATION Z CONSUMERS ARE TURNED OFF BY TRADITIONAL BRAND MESSAGING AND FIERCELY REJECT BRANDS THAT DON'T UNDERSTAND THEIR VISUAL LANGUAGE.**

3

### OLYMPIC AMBITIONS

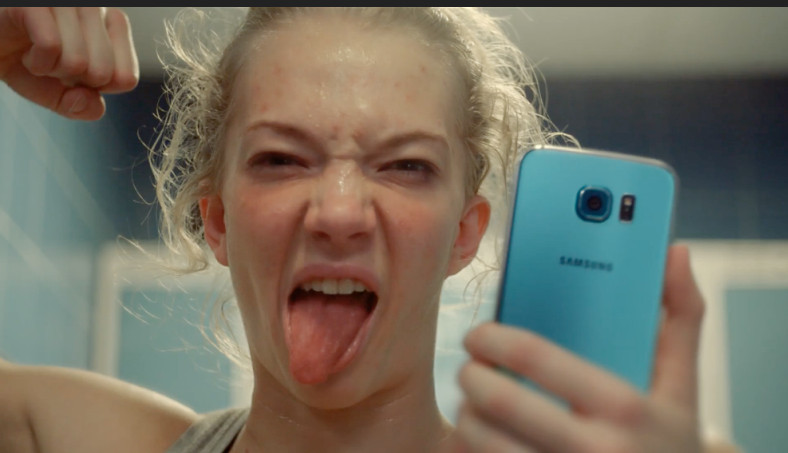
The teenage stars of the 2016 Winter Youth Olympic Games grapple with their inner demons in a campaign by Samsung.

#TheOnlyWayToKnow sheds light on the young athletes' feelings of self-doubt as they prepare for a crucial time in their fledgling careers. Will they rise to the challenge and triumph in Lillehammer or be forgotten and forced to give up on their dreams?

Narrated as an internal monologue, the campaign shows how the support of friends, family and followers on social media emboldens the athletes when they are at their lowest.

'All athletes, especially teenage athletes, face a debilitating amount of doubt and pressure. Together we fight these pressures and celebrate young athletes everywhere,' said Samsung.

Samsung #TheOnlyWayToKnow campaign for 2016 Winter Youth Olympics, Lillehammer



**THE PREVALENT SHIFT OF THE OPTIMISED SELF IS APPARENT IN GEN VIZ. RECENT RESEARCH SUGGESTS THAT GENERATION Z IS THE MOST HEALTH-CONSCIOUS CONSUMER DEMOGRAPHIC.**

# BACKLASH BRANDS

# E-MOTIONAL ECONOMY

# GEN VIZ

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