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New Consumer Summit Report

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The Future Laboratory is one of Europe's foremost brand strategy, consumer insight and trends research consultancies. Through its online network LS:N Global, it speaks to 300 clients in 14 lifestyle sectors on a daily, weekly and monthly basis.

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About Summits

An obstacle for many businesses today is how to build teams that are armed with fast-changing consumer information and capable of applying it strategically. The most compelling and entertaining way to bring this intelligence to life is through one of our highly subscribed live events.

Our Summits, held in partnership with EMC, are short, sharp and insightful presentations across market verticals on the key trends and business strategies to apply now to effectively meet consumers' demands over the next 12–18 months. These events are free and exclusive to clients, and include networking opportunities and a white paper overview of the presentation.

About Us

Since it was founded in 2001 The Future Laboratory has grown to become one of the world's most renowned futures consultancies, and has worked with more than 1,000 brands in 37 countries from offices in London, Melbourne and New York.

The Future Laboratory offers a range of services, from foresight to inspiration to strategic advice and activation.

At our core is a global team who continually research, analyse and document the new and the next, and set out the implications for organisations across 14 industry sectors.

Our strategy, innovation and creative teams help our clients to explore probable, possible and preferable futures to harness market trends, understand and adapt to emerging consumer needs, position their businesses for success and keep them ahead of their competitors.

About EMC

EMC, our partner and collaborator on this series of events, is a renowned cloud, data storage and e-solutions organisation that sits behind many of the brands, products and services we encounter on a day-to-day basis. As with all of our partners, we are working with EMC to identify the new, next and innovative ideas that are driving, determining and informing tomorrow's business and consumer requirements.

For further information about any of our events and services, please contact: info@thefuturelaboratory.com or call +44 20 7186 0776.

Partner Foreword

EMC

Generation D teens are the most data-hungry to date. This, of course, is only one half of the equation, as they generate and share their own content with equal enthusiasm and vigour.

Whether you want these kids to purchase your products, recommend you to their friends or work for you, first impressions are everything. We call this the five-second rule. If you don't capture their attention immediately then you can kiss goodbye to their engagement, custom and loyalty.

The key to winning the hearts and minds of the digitally dominant is, of course, technology. Data analytics enables businesses to delve deep under the skin of the market so they can create a truly personal message and then promote that on the right channel at the right moment.

*By Mark Sear, CTO big and fast data,
EMC Global Services EMEA*

New Consumer Summit

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Overview

New waves of disruption are rippling across markets and sectors, and their source can often be traced back to Gen Viz, the easily bored, activist, visual-first innovators who are beginning to flex their consumer muscle for the first time.

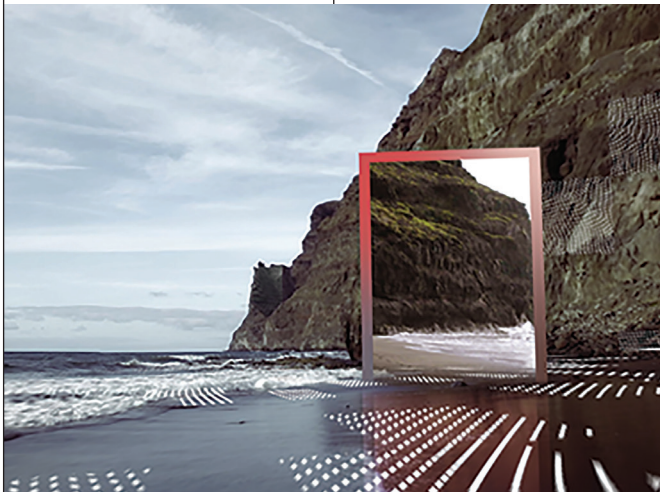
Brands are recognising that these rising teenagers – more often known as Generation Z – are the ultimate early adopters, and can't be regarded as just another demographic to sell to.

Technology pioneers who love to experiment with their own sense of identity, Gen Viz are challenging the status quo and

making waves across our Flat Age Society that are changing the consumer demands and desires of older demographics.

Suddenly everyone from Baby Boomers to Millennials are following the lead of the new kids on the block, accepting that age doesn't necessarily dictate taste, and that they too can plug in to a global network to simultaneously livestream a meek-bang, read news of terror attacks and scroll through images of the latest Decora-style tribes in Tokyo.

For brands, it is time to reconsider signifiers of success and notions of luxury and gender divides, or risk being left behind by the emerging new aesthetics and messaging that underpin the Gen Viz mindset.



DIESEL: NEW NATURES SPRING/SUMMER 2016 BY FIELD, UK



NERD MICROBIOME SKINCARE

You only have to look at China to see a challenging future consumer landscape unfolding before our eyes. In the powerhouse of the world's economy, 61.9% of teenagers no longer believe that financial accomplishment is the main signifier of success, according to RTG Consulting.

This is a stark warning to brands about how they will need to engage with these young consumers in the years ahead. 'If material things and traditional signals no longer dictate happiness, then brands that have pushed aspirational, product-led strategies will struggle to be relevant,' says OMD China.

Teen brands Abercrombie & Fitch and Aéropostale have already taken a hit from shifting aspirations among their Gen Viz customer base that has led their popularity and profits to plummet in China.

Abercrombie & Fitch has closed more than 275 stores, while Aéropostale shut more than 120 stores in 2014 alone, according to the Business of Fashion. Gen Viz, it seems, didn't like the way that both brands were talking to them.

'Overtly sexual marketing began to turn off a consumer who wasn't interested in that any more, which put us in a difficult place,' says Arthur Martinez, executive chairman of Abercrombie & Fitch.

This is a generation that hates to feel that it is being sold to. They are deeply intolerant of traditional advertising, seeking inspiration and ideas from influencers within their extensive online peer groups rather than from magazines or tv channels.

'There is a trend for authenticity and uniqueness over quality, and the meaning of status and luxury have shifted too,' says Felix Petty, an editor at youth culture bible i-D.

'Old subcultural signifiers of identity – terms such as goth, raver or punk – mean very little any more. Today's teenagers layer their identities and create their own unique lifestyle choices.'



OUTDOOR VOICES, US

In this report, The Future Laboratory examines these new layers of identity, aesthetics and status to define how tomorrow's New Consumer Tribes will think, feel and behave.

Extensive interviews with youth culture influencers from tribes such as Instant Messengers, Waste Warriors and Kidpreneurs, and with

sector experts and analysts are combined with quantitative analysis and innovative brand case studies to give you a global snapshot of this generation's demands and desires.

We can't give you all the answers. But this report will help you to start asking the right questions about what is possible for you and your brand in a New Consumer Tribe future.

Steve Tooze, foresight editor, The Future Laboratory



SONOS FLAGSHIP STORE, NEW YORK

Insight

Visual communicators

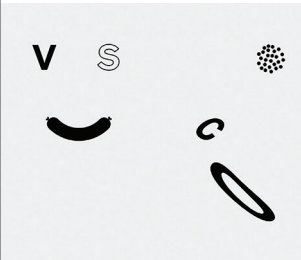
In keeping with their tribal name, Gen Viz teenagers have little patience with traditional long forms of written communication and use highly visual formats such as video games, emojis and GIFs to talk to each other.

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

‘Growing up, for whatever reason, I found it very difficult to focus on words,’ admits Gen Viz member Lance Oppenheim, a film-maker whose work has been exhibited at the Smithsonian Institution and won awards at 16 film festivals.



FIVE APP MESSAGING PLATFORM CREATED BY MATEUSZ MACH, CASE STUDY FROM LS:N GLOBAL'S GEN VIZ TRIBE



VSCO HAS DEVELOPED A CODE-BASED LANGUAGE

Oppenheim loves to indulge in video content from services such as Mubi and Netflix, and his go-to social networks Instagram and Vimeo are, of course, visual-first.

‘Visibility is key in this era because we live in a world of images,’ says Petra Collins, founder of feminist collective The Arduous. ‘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.’

With this in mind, brands are adopting new visual-first strategies. New app Pay Your Selfie pays consumers for taking selfies that feature branded products, and streaming service Spotify is aiming to broaden its consumer base by expanding its video services, releasing 12 original series, in direct competition with Apple Music.

Education-hackers

Gen Viz kids have watched their older Millennial siblings struggle with a jobs market rocked by the aftermath of the global financial crisis and decided to take their education in hand to ensure they are better equipped to deal with future economic turbulence.

More than three quarters (77%) of this demographic in the UK and Australia believe they need to learn the skills they think they’ll need for future jobs themselves because they fear that standard education does little to prepare them for the real world, according to a survey across nine countries by Future Foundation for IT consultancy Infosys.

‘For me it was a lot of learning by doing,’ Ciara Judge, 17, a Gen Viz tribe member and winner of the BT Young Scientist and EU Young Scientist awards, and the grand prize at the Google Science Fair. ‘My sources of learning were experience, which is just messing around and playing. And you can always use the internet to fact-check what you’re saying.’

For Gen Viz, hacking their own bespoke education is as important as learning at school or university, and brands and governments are beginning to take steps to address their new approach to less-structured learning.



TEKLA TECHNOLOGY FESTIVAL, SWEDEN

In Finland, schools have begun teaching topics rather than subjects to grab Gen Viz’s attention. Meanwhile, Adidas Originals’ Future House club space, with drop-in workshops by industry insiders, engages with the ad hoc approach of tomorrow’s cultural influencers.

Multiple browsers

Gen Viz is the iPhone generation, whose members are proud owners of five connected devices on average, and nearly a quarter (24%) of them are online ‘almost constantly’, according to the Pew Research Center.

Voracious consumers and creators of online content, they have a low attention span owing to continually juggling multiple screens simultaneously. ‘These heavy multiscreeeners find it difficult to filter out irrelevant stimuli – they are easily distracted

by multiple streams of media,’ says Alyson Gausby, consumer insights lead at AOL Canada.

Nameless.tv uses revelatory browsing to grab their attention. Its bespoke interface comes complete with niche YouTube content and a live community chat room encouraging users to comment on content.

Virgin Active has taken an alternative approach with a Pokémon Go integration that aims to encourage engagement with the real world. A gamified fun run takes in local Pokéstops and Pokégyms to create an augmented reality experience for those who might otherwise be distracted by their phones.

Advertising

Members of Gen Viz hate being sold to. Consumers aged 18–24 are the most frequent users of ad-blockers, according to a study by Sourcepoint and comScore.

‘The traditional model sends information that disrupts your experience of online,’ says Steven Lammertink, founder and CEO of influencer marketing group Cirql. ‘But nobody clicks on banner ads any more. People follow people because they want to see what they’ve experienced.’

This has driven a rise in the influencer market, where Instagram, YouTube and Snapchat stars have far more reach and engagement with a youth audience than a typical brand campaign.

Gucci understood this perfectly when it gave artist Petra Collins control of its Snapchat feed to offer an authentic, behind-the-scenes look at the creation of its latest campaign.

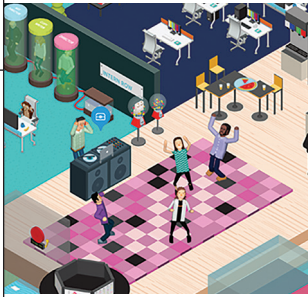


Global Netizens

On virtual paper, Gen Viz would seem to typify stereotypical isolated suburban teens locked in their bedrooms with only a plethora of screens for company. In fact, members of this tribe use their hyper-connected lifestyle to practise a new form of online global transnationalism.

In developed economies, these teens are the most racially diverse demographic by far. In the US, Hispanic, African-American, Asian and multiracial teenagers make up 47% of Gen Viz, according to the US Census Bureau.

Aware and proud of this, they are building online communities that dispel old notions of nationalism and race to build new senses of identity. '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.



INTERACTIVE RECRUITMENT SITE BY 360i

This developing trend can be seen in key Gen Viz cultural reference points such as Banana, a new print magazine that explores what it means to be physically, culturally and sociologically Asian, and asks Korean-American rapper Rekstizzy to talk about his acceptance of Kawaii – cute culture – as a lifestyle for men.

Kidpreneurs

Members of Gen Viz are entrepreneurial to the core, with almost three-quarters (72%) of them keen to start their own business, according to research by Millennial Branding. And they start young.

Kidpreneur Morgan Hipworth, 15, is the founder of Bistro Morgan, and makes and delivers as many as 700 doughnuts each week to cafés in Melbourne, Australia, in between his school work. 'It was a hobby that turned into a business and now it's my whole life,' he says. 'But I didn't start it with a business philosophy.'

Recruitment

Brands are waking up to the fact that graduate fairs and recruitment websites are no longer relevant as platforms for recruiting Gen Viz talent, and are creating engaging interactive experiences to grab their attention.

Gamification-based assessment is increasingly used to create a more detailed picture of potential recruits. Digital marketing agency 360i has created an interactive recruitment website that enables potential staff to explore 14 departments and observe avatars of real staff members as they work and play.

Technology start-up Arctic Shores creates mobile games that are designed to replace the stressful psychometric tests used by blue-chip companies to process candidates.

'We pick up 3,000 data points in a 20–30-minute assessment, whereas the typical self-report assessment test will pick up 50,' says Robert Newry, co-founder of Arctic Shores. 'Our ability to identify nuances and map what good looks like for a particular role in an organisation is significantly enhanced by that increased volume of information.'

Apple is already collaborating with the University of Naples Federico II to harness this entrepreneurial Gen Viz spirit at its iOS Developers Academy. Students learn free of charge how to develop for iOS platforms and conceive, establish and run a start-up business.

Instant Messengers

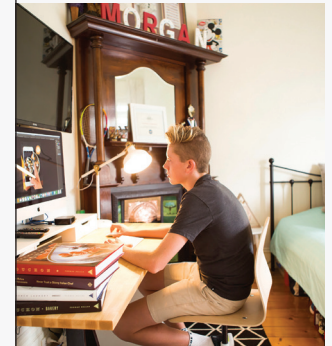
Forget about Facebook and Twitter when you're talking to Gen Viz. These retro tweens and teens have given the ageing technology of mobile Instant Messaging a whole new lease of life as their primary form of communication.

In the US, 90% of teenagers with mobile phones exchange texts, with a typical teenager sending and receiving 30 texts per day, and almost three-quarters (73%) using messaging apps such as WhatsApp, according to Pew Research Center.

'Messaging is one of the few things that people do more than social networking,' said Facebook CEO Mark Zuckerberg as he explained why the social network launched Messenger as a stand-alone app.

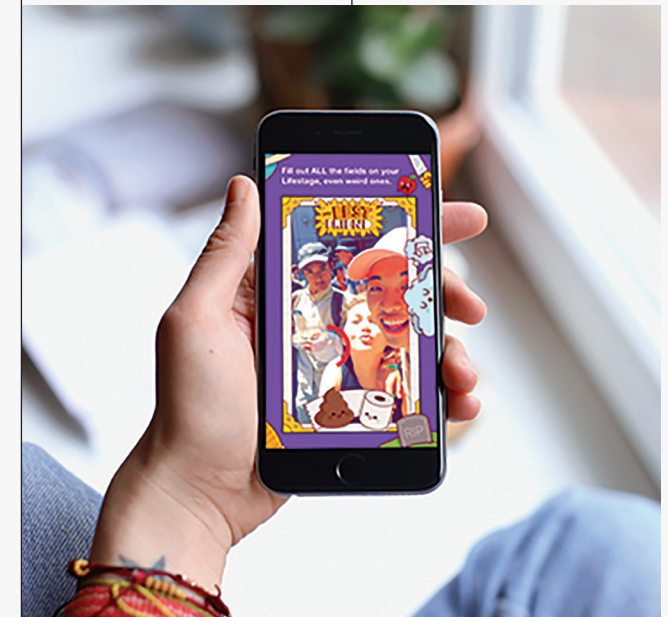
It's a move that makes sense to Gen Viz member, 15-year-old Emily Sanderson. 'Texting is where I can be private and my friends and I can talk about real stuff, like how I'm feeling or what I like and dislike about the day,' she says. 'I get the sense that I am spending time with them.'

Brands are beginning to plug into the Gen Viz texting obsession, recognising that the ability to talk in emoji is a key driving force for teens. Nintendo has launched Miitomo, a social messaging app that enables users to interact with each other using digital avatars.



MORGAN HIPWORTH, CASE STUDY FROM L:SN GLOBAL'S KIDPRENEURS TRIBE

Web magazine Refinery29 built its This AM messaging app to offer a daily news digest, aware that its readers wanted a mobile experience attuned to shorter attention spans.



LIFESTAGE APP BY FACEBOOK

Interactivity-lovers

Snapchat neatly encapsulates what Gen Viz teens want from their online communication tools of choice. Unabashedly honest, playful, fun, and perhaps best of all, quickly disappearing without a digital trace.

Some 77% of US college students use Snapchat each day, according to research by Sumpto. And 69% say the number one reason they use the platform is that it's fun to use, according to a study by Global Web Index.

Instagram has realised that the ephemerality of its competitor's service is one of the main reasons for its popularity among Gen Viz teens who are keen to control their digital footprint. So it has launched Stories, a



CAMPERLAB'S SPRING/SUMMER 2016 CAMPAIGN BY ROMAIN KREMER AND CONVOY AGENCY

feature that enables users to create and share photo and video content that is automatically deleted after 24 hours.

This Snapchat effect is being felt in other areas too. OKgrl, an online magazine for teenage girls, emulates the feel of a messaging app by enabling users to play games, share images and scroll through fashion shoots on an interactive site designed by DVTK.

'We set out to create a new fashion platform that can match the entertainment levels the young generation already gets from apps such as Instagram, Snapchat and Tumblr,' explains founder Louby McLoughlin.

Authenticity-seekers

Challenging their public image as a generation that likes to hide behind their online avatars, members of Gen Viz are using social platforms to embrace realness, turning difficult personal traits such as being cross-eyed or overweight into badges of honour.

'We are a generation busting the standards of the industry in terms of retouching models,' says Elise By Olsen, the 16-year-old editor and founder of Recens Paper. 'We know that it's fake, and we know we can't live up to it.'



MILK MAKEUP

Beauty brand Milk Makeup understood this attitude when it cast a diverse group of 40 ambassadors for a campaign that emphasised the beauty in originality and authenticity. 'Consumers today just want the truth,' says co-founder Mazdack Rassi. 'They don't want to be sold to, they don't want to be talked down to and they don't want people telling them how they should consume a product.'

Skincare brand Clearasil hit the right note with a new campaign aimed at a Gen Viz demographic that admitted it knew nothing about teenagers and their lifestyles. 'We only know teen acne,' a deadpan voiceover explained.

Food and drink

Teenagers are replacing the social ritual of shopping with dining, cooking and learning about food. Teenagers spend 22% of their income on food, up by 7% from 2005, according to Piper Jaffray.

Gen Viz will drive an 11% rise in fresh food consumption between 2013 and 2018, according to NPD Group. 'Food is the new status symbol for them,' says MaryLeigh Bliss, trends editor and strategic consultant at youth research agency Ypulse.

Healthy, freshly prepared vegetables, sushi and salads from brands such as True Food Kitchen, Whole Foods Market and Pressed Juicery are popular with Gen Viz tribe members.

In contrast, many of these teens avoid ready-to-eat foods and microwavable meals, and shun fast food brands such as McDonald's for ethical reasons.

'One of my main goals is never to be in a situation where I can't afford to eat healthily,' says Gen Viz member and Five app founder Mateusz Mach.



EVERYTABLE HEALTHY FAST FOOD RESTAURANT, LOS ANGELES

Generation Sober

Drink and street drugs have been a rite of passage for almost every teenage generation of the past half century. But once again Gen Viz is exploding stereotypes by embracing sobriety, healthy living and sport with more enthusiasm than any other current demographic.

Only 38% of 11–15-year-olds have tried alcohol at least once and just 18% have smoked at least once – the lowest percentages the NatCen survey has recorded since it began in 1982.

Gen Viz members are adamant that this is a long-term lifestyle choice rather than a statistical blip. 'Why would you smoke when you know it increases your chance of getting cancer by 50%,' says Ciara Judge.

'It's a reflection of what happens when you provide accurate information to teens – they can make informed decisions,' said Deanna Wilson MD, Johns Hopkins University School of Medicine, speaking to USA Today.

To cater for their sober take on life, alcohol-free and drug-free experiences are on the rise. Lik in London offers substance-free nights for health-conscious partygoers and US-based pop up The Shine promises a Happy Hour packed with music, meditation and food – without the booze.

Alcohol alternatives are gaining popularity with a Gen Viz audience too. Cacao is being hailed as the new ecstasy, but without the comedown. Morning Gloryville, Lucid and Lady Cacao's Secret Chamber are all venues where people can drink cacao together, meditate and dance to electronic music.

Hand in hand with a rejection of drink- and drug-induced fun, Gen Viz teens are making healthy living and sport a key part of their lifestyle. Sports participation among high school students in North America has jumped from 25% to more than 35% over the past 35 years, largely driven by a near doubling among girls, from 17% to 32% in the same period, according to Morgan Stanley.

Swimming, cheerleading, cross-country running and quadrathlons are Gen Viz favourites and Skyler Dearen, 16, of Newport Beach, California, is typical of the new breed. She is the youngest certified hot yoga instructor in the US – and she has been practising yoga since the age of six.



ADIDAS FUTURECRAFT

'Each day I do a workout for my body and a work-in for my heart and soul,' she says. Perhaps unsurprisingly, this attitude extends to Skyler's food, drink and beauty rituals, where she keeps things clean, organic and raw.

Technology brand Samsung highlighted this growing attitude in its #TheOnlyWayToKnow campaign following teen

stars of the 2016 Winter Youth Olympic Games as their friends, families and social media followers helped them battle with self-doubt.

Similarly, Nike's eight-part YouTube series about a likeable slacker called Margot and an uptight fitness vlogger called Lily further mirrors this generation's attitude towards optimising its health as the characters encourage one another to make fitness videos and friends.



SKYLER DEAREN'S HOME, CASE STUDY FROM LS:N GLOBAL'S GEN VIZ TRIBE



RECENS PAPER BY ELISE BY OLSEN

Chief Influence Officers

Media, advertising and entertainment brands are waking up to a hard truth: those with the greatest influence online are often still at school – because the editors and influencers of Gen Viz are the only ones truly able to engage with their peers.

'Teenagers are making the culture, not some 40-year-old broadsheet journalist at The Independent who happens to be a Vine whizz,' says Dazed Digital's Gorton.

Recens Paper's Elise By Olsen couldn't agree more. 'It's about having an insider's point of view. It's about being part of the youth community,' she says. 'Thirty-year-olds writing about youth culture means there are a lot of stereotypes about youth.'

An understanding is growing that brands need Gen Viz input to talk effectively to a Gen Viz crowd. Obsessee, a new social media-first magazine published by Clique Media Group and aimed at girls and women aged between 14 and 22, has four members of Gen Viz as editors.

It is not just publications that are taking this line. The Tate's youth engagement team Tate Collective has recruited 15–25-year-olds to drive a rethink about how young people access the gallery's collections, leading to a late night gig by underground radio station Krupt FM.

For one of the world's most successful media brands, employing teenagers is a more of an investment than a risk. Shane Smith, CEO of Vice Media, recently stated: 'The BBC isn't going to give a 23-year-old kid straight out of college £7.5m [\$10m, €9m] to make a tv show – but we are.'

Fashion

Activewear is outselling denim among US Gen Viz teens, according to a report by Piper Jaffray. This tribe prefer leggings to jeans, favour activewear brands such as Nike and Lululemon, and talk about fashion as a form of self-expression.

'Denim is associated with old people,' explains Daryoush Haj-Najafi, senior editor at Complex UK. 'Athleisure is frowned upon, so it's a good way of placing yourself on the side of the new. Nike particularly appeals to those less bound by convention.'

Overall, today's teens spend less on material goods, however. Chinese members of Gen Viz are keen to explore lifestyles that focus on experiences, rather than materialism and consumerism, according to a study by agency OMD China.

Gen Viz member Elise by Olsen buys second-hand clothing from thrift stores because she values style over fashion, and feels it is an environmentally friendly alternative to mainstream materialism.



Live Streamers

A large proportion of Gen Viz teens crave spontaneous and ephemeral interaction with live audiences that share their niche interests. As a result, video chat platform YouNow averages 150,000 live broadcasts each day and has a strong following among young consumers – 74% are under 24 and 56% are female.

Recognising a growing need among Gen Viz consumers, Amazon paid £735m (\$970m, €859m) for Twitch, a platform that enables viewers to watch and chat to other users as they play video games in real time.

This generation's preference for visual content explains why Twitter is suffering – just 3% of US teenagers aged 13–14 use the platform, according to Pew Research Center – and platforms such as Periscope are thriving.



FABLED BY MARIE CLAIRE AND OCADO, UK



UNISEX BEAUTY BRAND MAKE

'People have the ability to interact in a new way and the playing field has been levelled to allow all people to broadcast,' says Jon Erlichman, co-founder of Periscope channel Parachute TV.

Department store group Selfridges took this desire to interact to heart with its Shakespeare ReFASHIONed campaign. To reach a youth demographic, it created a Boiler Room-style live stream with performances from spoken word poet James Massiah and DJ Siobhan Bell.

BuzzFeed UK is another strong advocate of livestreaming for Gen Viz fans. Since Facebook launched its service, it has broadcast everything from a game show where The Try Guys exploded a giant balloon to a public debate on the EU referendum.

Beauty

Gen Viz teens have become Post-body Advocates, rejecting commercial perfection in favour of a celebration of individual traits such as a big nose or gap-toothed grin. For them, cosmetics are a tool of self-expression rather than a route to flawlessness.

This desire to experiment with identity through beauty products is creating a mainstream market for men. Leading beauty brands are reporting a huge rise in interest from male consumers.

MrPorter.com, which sells everything from a Tom Ford Beauty concealer to a sonic system deep cleansing brush by Clinique, reported 300% growth in sales of men's beauty and grooming products in 2015.

'The shift towards non-gendered products is not a mere consumer trend in cosmetics,' says Rintaro Okamura, head of product at Shiseido Men. 'It is a small part of a larger societal shift.'

MAC Cosmetics director of artistry Terry Barber was intrigued by the gender neutrality on show in the London men's spring/summer 2017 collections. 'It's all about blurring the lines between masculine and feminine,' he says.

Born activists

Today's hyper-connected teenagers have a global perspective on social concerns ranging from environmental issues to LGBT rights, and they use their social media channels to champion the causes that they believe in.

'Identity at its core is what teenagers are interested in – the idea that they control who they are, their bodies and what they say,' says Thomas Gorton, editor of Dazed Digital.

Art Hoe, a Gen Viz collective with about 30,000 Instagram followers, aims to cultivate a dialogue around gender, race and identity with its socially conscious philosophy and challenging imagery.

BuzzFeed tapped into this with a day dedicated to Muslim content on Snapchat. 'We wanted to show appreciation of our Muslim audience, while exposing non-Muslims to their culture,' says supervising video producer Johnny Woods.



REMEMBER THE GLACIERS BY GLACIER GIRL

This activist mindset extends to Whole-system change, a sentiment that fashion designer Stella McCartney acknowledged with the launch of her environmentally friendly fragrance POP. The campaign for POP featured activists such as Grimes, Amandla Stenberg and Kenya Kinski-Jones, three young women with a high social media profile based on their ethical campaigning.

But it's not all about big-budget marketing campaigns for this psychographic. 'Anyone can make a change, whether it's sharing a message through selfies in your bedroom or just speaking to friends and family,' says teen activist Elizabeth Farrell, also known as Glacier Girl. 'You don't have to be a pop star to get your voice heard.'



MARTINA SPETLOVA'S SUSTAINABLE LEATHER COLLECTION, PART OF SELFRIDGES' BRIGHT NEW THINGS, 2016



LONELY GIRLS LINGERIE CAMPAIGN WITH
LENA DUNHAM AND JEMIMA KIRKE

Post-body Advocates

Members of Gen Viz place less value on body image. Personality comes first. In the words of supermodel Cara Delevingne: 'Don't worry, be happy. Embrace your weirdness. Stop labelling, start living.'

Only 48% of Generation D kids in the US identify as exclusively heterosexual, compared to 65% of Millennials, according to J Walter Thompson Innovation Group. And according to NPD Group, non-gender-specific brands are reporting double-digit growth in a challenging market.

Fragrance brand Axe, renowned for its masculine, babe-magnet ads, was one of the first to acknowledge this sentiment in its Find Your Magic campaign, which championed personality over body image.

Shiseido's film *High School Girl?* similarly examined genderless beauty. At first, the film appears to show a group of young women in a classroom. But then each one pulls off wigs and removes make-up to reveal the boys beneath Shiseido's cosmetics – and the transformative power of its products.

E-commerce

Teenagers are becoming the new barometer of consumer expectations in retail. Generation D kids have a spending power of about £151bn (\$200bn, €177bn) when factoring in their influence on parental or household buying decisions, according to Mintel.

'If you are focused on just getting Millennials, you are going to lose the generation that is coming up behind,' explains Marcie Merriman, executive director of growth strategy and retail innovation at Ernst & Young.

'Generation Z has the highest expectations. If you please them, you're also going to please Millennials – and Generation X and Baby Boomers and others will be happy.'

Brands are tapping into this market by responding to Gen Viz's preference for social media-driven platforms. Women's lifestyle site PopSugar has declared it wants to be the iTunes of fashion and accessories by integrating purchase points on both ShopStyle and PopSugar.

Meanwhile, subscription beauty service Birchbox has launched its own Snapchat video customer service hotline.

Conclusion

Over the next decade, Gen Viz will conduct a global bonfire of traditional consumer certainties. Long-accepted understandings about identity, gender and status will be ripped apart by these constantly connected, visually precocious teens to be re-assembled in intriguing and inspiring new patterns of purchase and engagement.

It's time for the brands that want to win their loyalty to start dismantling any stereotyped visions about these young customers – not least because, in a reversal of the normal patterns of adoption, older demographics are starting to take a lead from Gen Viz behaviour.

For starters, drop any notion that members of this generation are using their multitude of screens to hide away from reality or from each other. The reverse is true.

Gen Viz kids are using digital technology and social media to radically re-engage with a wider world, and in so doing, to build new communities, identities, loyalties and priorities.

Gender feels far more fluid to a generation that is coming of age in an era when being gay

is unremarkable and when a transsexual can win an international singing contest. These are feisty believers in the right to gender neutrality in lifestyle choices, and they are ready to fight and campaign for their right, or the rights of others, to make those choices.

Nationalism, and the often associated tropes about race, feel irrelevant to teenagers who've grown up playing online games or Snapchatting with peers on the other side of the world.

Similarly, a from-the-cradle immersion in the image-shifting possibilities of the web have made them reject the quest for impossible perfection that lies behind much of the retail and beauty sector's marketing. The real and the authentic are sought and passionately embraced.

As a result, their basic message to brands is: 'We trust each other – we don't



KOREAN-POLISH RESTAURANT KIMSKI,
CHICAGO. BRANDING BY FRANKLYN



HELLO HATSU! ART DIRECTION
BY PABLO ALFIERI

trust you.' So identifying their most influential online peers has never been so vital.

Their layers of overlapping online identities and avatars make them natural entrepreneurs. When you're comfortable with the idea of yourself as a one-person digital brand, it's only a short step to thinking about how to monetise the things that your online friends value about you.

This adds up to both a challenge and a huge opportunity for brands. Gen Viz will ridicule and reject you if you cross any of their red lines: note the problems that Abercrombie & Fitch hit in China with over-sexualised messaging to young consumers.

But if you have the confidence to talk to them authentically in a visual-first, interactive and irreverent way by using one of their own as your translator, then this is a generation that is ready and waiting to be your virtual friend and playmate.

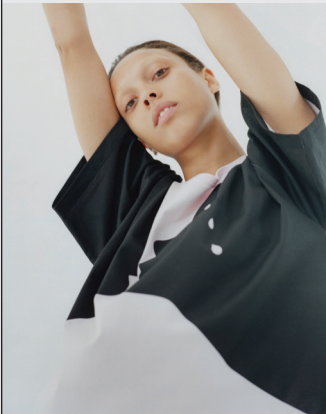
Toolkit

• Short attention spans

- : Visibility is key in this era. Be visual-first and keep copy to a minimum as pop culture continues to draw on the online phenomenon for creative influence. Make sure your brand is an aesthetic, shareable experience
- : Embrace a multiplatform approach and think laterally about your marketing and media strategy. This is not a one-channel-fits-all generation so cleverly layer points of access and engagement
- : Always be fun to use, connected and in the moment. Invest in new and niche technology that incorporates spontaneity and ephemeral interaction



CAMPER AUTUMN/WINTER 2016
COLLECTION CAMPAIGN BY DOM
SEBASTIAN



SELFRIDGES PRESENTS SHAKESPEARE
REFASHIONED, LONDON

• Authentic perfection

- : Being relatable is your biggest currency so embrace diversity to enable Generation D kids to feel truly represented. A homogeneous look does not appeal to these new consumers with their global, multicultural outlook
- : Generation D teens are intolerant of traditional advertising, and are proving that anyone can effect change from as young as 13, and from their bedrooms, so reach beyond stereotypical identifiers of status and typical celebrity culture
- : Remember, personality comes first and foremost, so as a brand, champion this over body image and stereotypes. Be challenging when it comes to gender boundaries as this is no time to be timidly unisex

• Be an insider

- : Use one of their own as your translator. It's teenagers that are making culture not the efforts of a 30something or 40something marketer
- : Have an insider's point of view to be part of their community and aim to cultivate a dialogue that challenges the status quo. Give Gen Viz kids a platform to be heard rather than dictate your brand's terms and conditions
- : Refocus your marketing budgets. Brands are starting to redefine their entire marketing campaign as an influencer strategy so go beyond static, traditional print media



MILK ANTI-FRIZZ LEAVE-IN NOURISHING
TREATMENT BY REVERIE

• Global strategies

- : Mirror Generation D's hyper-connected online lifestyles to practise new forms of global transnationalism. This is no longer about localising campaigns, but about the right time for global brands to represent cultural diversity
- : Use popular real-time networks and channels to simultaneously live stream and deliver global connectivity, as Generation D teens respond positively to immediacy, newness and momentum
- : Help to blur the boundaries between commerce and culture to enable these new global citizens to build their identity, broaden their reach to global audiences and turn their hobbies into businesses



MR ROBOT INTERACTIVE HACKING GAME
BY NIGHT SCHOOL STUDIO

• Conscious consumption

- : Reflect Generation D teens' more long-term focused lifestyle choices. Consider a more holistic business system that has environmental and social longevity at its core
- : Vices are definitely changing for this generation. Champion a more honest and transparent approach to campaigns, and provide accurate information as this equals a more considered, informed, and therefore loyal, future consumer
- : Make healthy living a key part of your brand proposition to reflect Generation D's own lifestyle choices. Generation D kids are the ultimate Optimised Selves and are influencing older generations



ASICS 2016 SPRING CAMPAIGN.
PHOTOGRAPHY BY JUCO

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From inspiration to strategic advice and activation, The Future Laboratory offers a range of services to help you harness market trends, understand and adapt to emerging needs, and keep you ahead of the competition.

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