

not everything
 but anything
 I want

Barbara, 26, Germany

Introduction

BELIEFS AND BEHAVIOURS CHANGE CONSTANTLY, ESPECIALLY AMONG YOUNG PEOPLE.
EUROPE IS NOT THE SAME BUT A RICH COLLECTION OF LOCAL CULTURES.

These two observations made it evident that there was no comprehensive, up to date study of young adults across Europe that could answer the many questions facing today's brands. How are people coping with an uncertain, changing world? Is there such a thing as a European citizen? Has celebrity had its fifteen minutes? Is TV dead? Does technology make people more creative? Do young Europeans want to be rich?

Brands need to take advantage of broad trends but need to know how to interpret them for local audiences. So BBDO Europe set out to answer some of these questions, using its unique European network to get in-depth local insights combined with an understanding of global trends. Leading research agency Flamingo International carried out a qualitative study of early adopters of change, men and women aged 18 to 30 in the Czech Republic, France, Germany, Russia, Spain and the UK. This included trend forums supplemented by creative inputs from respondents, one-to-one telephone calls and group discussions over dinner. Online specialist The Wire surveyed 1,600 young adults representing more mainstream opinion in eight countries. In addition trends specialist Nilewide and each local BBDO office provided a comprehensive analysis of current behaviour.

We did not approach this project expecting glossy or neat answers, nor did we find them. What we discovered instead was an intricate pattern of similarities, differences and contradictions that beautifully illustrate both the diversity and the common spirit of young Europeans.

The next few pages outline nine trends, each brought to life with examples of actual behaviour and material created by the Twenty Somethings who took part, and highlight implications for brands.

Contents



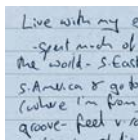
The Big
Picture

08



The Me
Project

10



Life in Motion

14



Return to
Roots

16



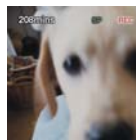
Mixing
Things Up

18



Fame and
Respect

22



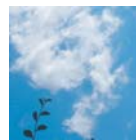
Technology

26



Soul Beauty

30



New
Citizenship

34



Enough
is Enough

36

The Big Picture

FATBOY SLIM,
'BECAUSE WE
CAN, CAN, CAN,
YES WE CAN,
CAN, CAN, CAN'.

'Not everything but anything I want' is a quote that conveys the spirit of this generation of European Twenty Somethings.

For them having everything is out and doing anything is in. They are empowered by their self-confidence and could be called the 'I can' generation. Enabled by their easy use of technology they feel free to do things previous generations could not: travel on a whim, balance work and life, explore diverse relationships and embrace all the experiences life has to offer.

Of this generation, more than 60% believe they can control their own success. Only 12% do not believe they will live better lives than their parents. 82% have goals that they are dedicated to achieving, and there is a clear understanding that with the right planning they can have an interesting and stimulating life that makes the most of who they are.

Another aspect of Twenty Somethings is their rejection of the concept of failure. Because they alone assess their successes and failures, they treat things that don't go as planned as a different kind of learning experience.

But you would be quite wrong to think they are naïve. They have a clear view of the complexity of the world and the anxiety it can create, but they know they can't change it and don't seek to rebel. Instead they choose to filter out the things that do not directly impact on them, and focus their passion and energy on things that shape their lives in a positive way.

This generation knows what it wants and where to find it. Like suns in the middle of their own universes, they choose to be orbited by people and activities that appeal. They view their lives as an adventure packed with experiences. Experiences that are to be collected and displayed like status symbols, and to be valued above everything else - including financial wealth.

We will explore how this impacts on their behaviour and how brands need to respond.



Call me up – I'm virtually yours...

In search of perfection



WANNA NEW TATTOO
BUT DON'T KNOW WHERE?

if you look after your soul YOU'RE A REAL PERSON



Making success of what
you love doing is the
key in life.



The Me Project

YOUNG EUROPEANS
ARE OPEN TO EXPLORING
THEIR SEXUALITY.

The drive to live a rich, fulfilled life and develop one's unique identity we call the "Me Project". It's about finding, planning and executing experiences which will help improve the personal qualities a Twenty Something already has. They are dedicated to their Me Projects, treating them as serious undertakings that call for the same kind of commitment young adults from a previous generation might have channelled into anti-globalisation protests or sculpting their bodies in the gym.

What is different about this generation's approach to identity? Me Projects are not about seeking to invent or reinvent. Twenty Somethings are not at all dissatisfied with who they are but feel rooted and secure. Unlike the previous generation, they define themselves by what they are rather than what they are not, saying in effect "I am" as opposed to "I am not". Similarly, the development of identity does not mean the multiple identities much talked about a few years ago.

This generation has worked out what earlier generations did not: how to shield itself from the white noise the world imposes on it. If something isn't relevant to their personal self they filter it out. This filter of self keeps them free of distraction and fully focused on themselves and their Me Projects.

Personal identity for Twenty Somethings is less about status and possessions in a traditional sense, and more about what they experience in life. They collect experiences in a similar way to how their parents collected stamps and they use those experiences to help define and refine their identity step-by-step.

With such confidence comes a willingness to experiment and play. Knowing fashions as they do, Twenty Somethings will put together personal combinations to enhance who they are. Understanding technology at an intuitive level, they will play with conventions. For example, 56% of this generation has more than one email or web name. This confidence also allows a high degree of tolerance for the identity choices of others.

So brand marketers are faced with making significant changes if they are to connect with this new generation of consumers. Twenty Somethings seek brands with an equally strong identity to their own. They want to understand the spirit of a brand, and whether it is attuned to their spirit and their world. So although having a benefit remains important, brands need to focus less on selling benefits and more on developing a spirit and creating experiences that reflect that spirit. In this way brands can become enablers of the Me Project.

The emblematic brand is Apple. It stands for creativity, originality, freedom and personal expression. But instead of explicitly selling these benefits Apple presents itself as a facilitator of this generation's creativity. It allows them to explore and experience themselves through its products. And by holding fast to its spirit, Apple has been able to emerge from setbacks stronger than before. It is a perfect symbol for this generation and how it wants brands to be.



A Spanish life plan. PABLO, BARCELONA

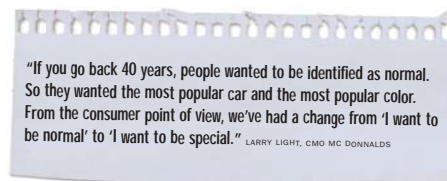


Everyone has to find out for themselves
what sort of life they want to lead.

CLAUDIA, HAMBURG



Der Rote Faden - the red thread: a respondent's interpretation of the binding thread of life. KATJA, BERLIN



LARRY LIGHT, CMO MC DONALDS



"NOTHING IS PERMANENT
AND NOTHING IS IMPOSSIBLE
KNOWING WHAT YOU WANT TO DO
WITH YOUR LIFE IS THE
GREATEST CHALLENGE"

MARC, BARCELONA

EUROPEAN FAST FACTS

COMFORTABLE WITH WHO THEY ARE,
53% of young Europeans are open to exploring their sexuality.

Russians top the list of **SEXUAL OPENNESS** (65%), though German men and Spanish women run them close. Swedes confound the stereotype of sexual freedom with only 41% being open to exploring their sexuality.

SPIRITUALITY is not part of The Me Project and nothing indicates a growing spiritual dimension. Only 25% feel there are more spiritual than their parents. 39% say they are not.

*Online Survey by The Wire for BBDO Europe

Life in Motion

Every journey brings a new experience.

And every new experience brings a new level of understanding about yourself. It's the reason travel is central to this generation. And when it comes to travel, once again this generation first looks at what's in it for them. So, while Twenty Somethings are tolerant and open to how other people think and behave, they are less likely to want to understand fully the culture of the people and places they visit. Instead the question is more what effect experiencing an unfamiliar place will have on them as an individual. A young German woman talked of her interest in how travel might affect her introverted personality. Cheap travel and open borders in Europe have brought about a 'go anywhere, anytime' mentality. The willingness of young Europeans to hop on a plane is creating their own European Community, not one defined by Brussels, but one created in the image of their own free spirit. One result is to fuel the development of Dublin, Barcelona and London as vibrant, cosmopolitan centres. This is creating a small but growing number of young people for whom 'Europe' is home – people who feel comfortable in several countries, cultures and languages. Two broad opportunities for brands result. The first is that travel brands have the opportunity to move from selling convenience to treating Europe, indeed the world, as one big playground. The simplicity of online booking, the cost savings of budget airlines, the practicality of short city breaks are just a means to an end. What counts for Twenty Somethings is the spirit and experiences that can enable their self-development. The second is that cultures which embody the same openness, the same free-spirited approach to living embraced by this generation, are becoming more and more relevant. Be it the melting pot of Brazil or the untamed spirit of Havana, there are opportunities for brands to capitalize and nowhere is this more evident than in the world of drink, food or fashion brands.



L'auberge Espagnole - a film in which young people from different European countries meet for the experience of a lifetime.

LUNEDÌ
MONDAY
30
GENNAIO
JANUARY

Live with my girlfriend - go away a lot
- spent much of last 2 yrs travelling round
the world - S. East Asia, Australasia, USA,
S. America & go to Spain a lot + down to Cornwall
(where I'm from) & up to Shropshire for a rural
groove - feel v. rooted when there - horse riding, mixing
music in studio - going to beach. Love having
freedom - don't like to be in bondage to anything /
anyone - hbb / wosh etc.

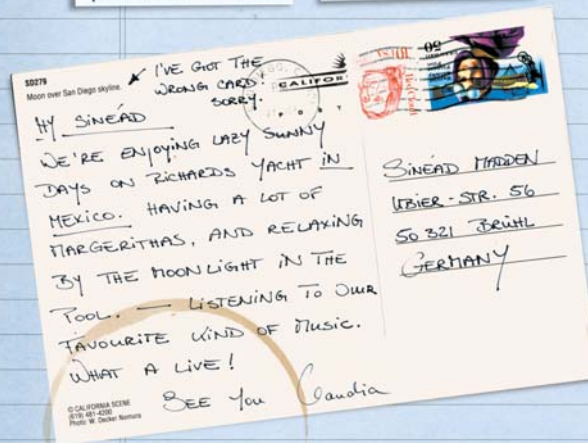
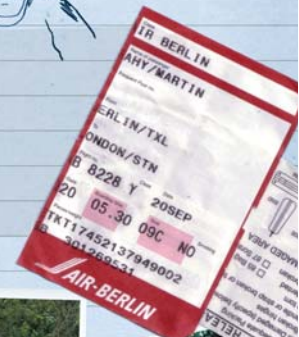


With 1000€ I would open a SAVINGS ACCOUNT OR INVEST IT ON THE
STOCK MARKET. I would keep a small amount of it
to buy a quad, something I've wanted for a long time

JULIAN, PARIS



RED HOT CHILI PEPPERS
Phoenix Park - Dublin 2004



EUROPEAN FAST FACTS

Almost two thirds of our sample aim to take **TIME OUT FROM WORK TO TRAVEL**. The trend is strongest in Europe's newer democracies – 91% of Czechs, 81% of Spaniards, 66% of Russians. More students plan time out than young people in jobs – 68% compared to 58%.

Even **LIVING OR WORKING ABROAD** is now mainstream with one third expecting to do so. The British are keenest (almost half) with Swedes close behind (40%) but only 28% of Italians and 22% of Russians. Fluency in English, opportunity and family ties may explain variations.

Those who put **ENRICHING EXPERIENCES** ahead of being rich outnumber those that don't in every European country, on average by 4 to 1, their parents. 39% say they are not.

*Online Survey by The Wire for BBDO Europe

Return to Roots

MARRIAGE AND FAMILY STILL ATTRACT.

For a generation so keen to experience the world and themselves in it, it is surprising to discover how strongly our Twenty Somethings still want the conventional things: marriage, children, home. But these are part of their roots - and they are not looking to escape. Origins and nationalities are a positive part of who they are and provide a safe place to come back to. It makes exploration and experimentation far less risky in today's more troubled world. Post September 11th, half young French people say their family 'has become more important'.

This is a real change from five or six years ago when people seemed more restless and less satisfied with where they had started out. Emigration to somewhere (anywhere!) better was a desire for many. Now much of this restlessness has been replaced by a confidence to feel good about yourself and where you come from.

In some countries, this attachment to roots is expressed through nostalgia for better times, a past that may never have happened but which offers reassurance today. Young Russians like things that feel reminiscent of the USSR both in terms of fashion and even Stalinist architecture. In the former East Germany, "Ostalgie" is rife and in France too there has been a recent flood of nostalgic films.

So, just perhaps, now is the time for brands to start proclaiming their origin with renewed confidence. A brand which is firmly rooted, that doesn't pander to every current whim, mirrors this generation's calm self-assurance. Brands, for example, like Rittersport from Germany or Marmite in the UK.

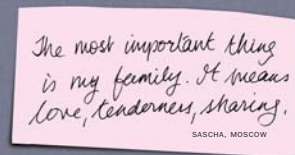
Combining nostalgia with new technology also offers brands an opportunity. Vespa and the new Mini bring back things from a fondly remembered past - but better. Last, but not least, there is a real attractiveness for brands that are able to mix a global structure and a local touch, thus having a real attachment to one's culture and rooted identity.



SPANISH PRIDE
BULL ICON



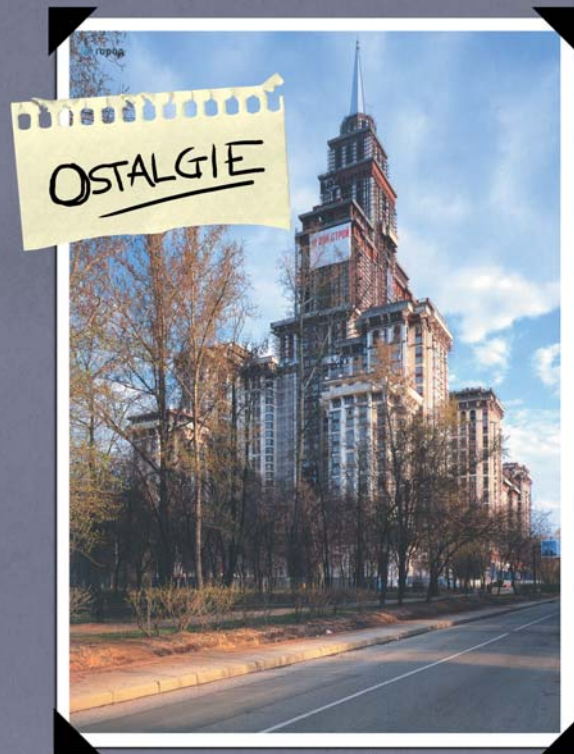
They may not feel like loyal citizens but young Europeans feel rooted to the place they were born, a physical and mental refuge.



SASCHA, MOSCOW



The importance of family



Soviet era products touch a chord with modern audiences

EUROPEAN FAST FACTS

For 79% **MARRIAGE AND FAMILY** still attract. More so still for Czechs, Russians, French and Italians. And women.

57% of men and half of all women take a **PRAGMATIC VIEW OF PARENTHOOD**, believing mothers should take time off work when their children are young. France and Spain are exceptions with a third or less agreeing.

*Online Survey by The Wire for BBDO Europe

MIXING THINGS UP

This veiled woman was the most selected image of all during the trend forums



Mixing Things Up

IN WESTERN COUNTRIES THERE WAS AN OVERWHELMING LEVEL OF AGREEMENT FOR BEING EQUALLY COMFORTABLE IN GAY OR STRAIGHT COMPANY. IN GERMANY ONE GROUP TALKED ABOUT THE VARIED SEXUAL ACTIVITIES OF THEIR FRIEND (INCLUDING THREESOMES AND SWINGING) WITH UNQUESTIONING ACCEPTANCE.

This generation seeks to explore their identity in every choice that they make. Someone wearing a pair of furry Ugg boots with a retro blazer, eating sushi and listening to mash-ups may have sent mixed signals to a previous generation. To this one, it is a sign of being confident and sophisticated enough to mix things up. This enables a complex form of self-expression that demonstrates the individuality of each person's particular combination and in turn helps him or her to understand themselves better.

In Western Europe, we found that this trend went as far as people playing with their identities - exploring different ideas and looks in phases or even changing day to day. This range of options is limitless but includes piercings, temporary tattoos and extreme hair colours, and is exemplified by a suit-wearing, fasttracked Brussels bureaucrat who has a tongue piercing that is replaced by a plastic pin during work hours. In Russia and the Czech Republic, this trend is less playful and more assertive than in the West. There remain clearer boundaries about what the image people aspire to – be it sexy city chick or metrosexual playboy.

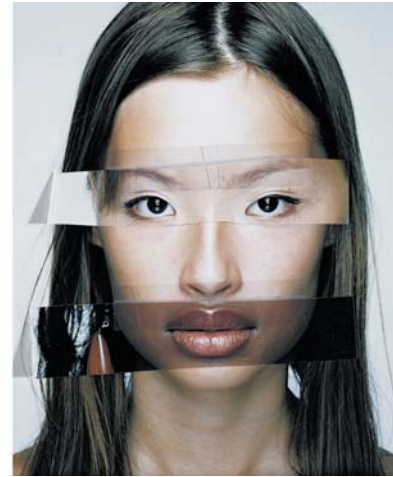
Another element of this mixing manifests itself in a very high level of toleration for the behaviour of others. Twenty Somethings think it extremely uncool to judge the behaviour of others and expect the same in return. When asked if they would decline a job abroad if their families or friends opposed them going, respondents were baffled – 'why wouldn't they want what's good for me?'. All said they would take the job.

This focus on mixing has implications for brands. Twenty Somethings respect brands that have a strong identity, and they can put them in their repertoire and start to play. This is one of the reasons why luxury brands have become popular with this audience. There is also a clear opportunity for brands that establish themselves as 'enablers to play'. Gap's current advertising (in which Sarah Jessica Parker wears clothes in different ways) is a great example of this concept. Think too of the iPod, which enables people to control and customise their whole music selection.

This trend challenges conventional brand thinking that looks to target markets based on demographics, behaviour and lifestyles. For this group, brands need to offer slivers of identity, momentary cues as to who a person wants to be at any one time. The idea of mixing things up can help this generation find in brands echoes of themselves. Drinks brands are probably nearer this realisation than most: depending on the person, mood and situation there are choices to signal individuality, conformity, laddishness, discrimination or hedonism.



Blurring sexual boundaries



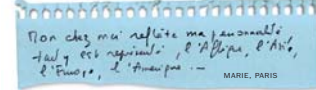
Italian advertisement for Campari Mixx



Polysexual - The new way to mix things up



Retro chic all over again



MARIE, PARIS



Intolerance = uncool

The third sex

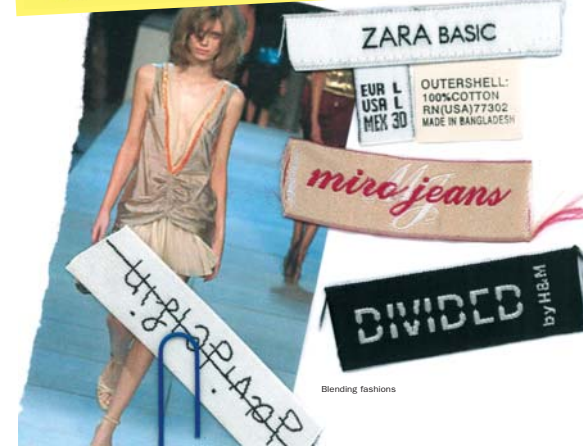
The phenomenon of refined consumption - metrosexuality - appeared in Russia too. The most striking representatives of this group in



Metrosexuality in Russia and Spain



LIFE IS ABOUT CREATING NEW CONSTELLATIONS MAY IT BE MUSIC ART OR EVEN MA* SEXUALITY CHRIS, HAMBURG



Blending fashions

EUROPEAN FAST FACTS

THE WIRE FOR BBDO EUROPE

.....

An **OPEN AND ACCEPTING** generation: 57% are equally comfortable in gay or straight company compared to 22% who are not. But big variations exist. Tolerant Sweden (75%) and Britain (70%) contrast markedly with Eastern Europe where opinion is sharply divided

.....

Women (64) are more comfortable in **GAY COMPANY** than men (45%).

.....

A sizable number (30%) have incorporated **ALTERNATIVE THERAPIES** into their health management. France leads the way: one in two believe in alternative therapies.

.....

*Online Survey by The Wire for BBDO Europe



Fame and Respect

Andy Warhol famously said that everyone can be famous for fifteen minutes. For this generation it is truer than ever, and they are quite happy to be famous for fifteen minutes, as long as once they've had the experience they can move on with the rest of their lives. Even in Russia, Turkey and the Czech Republic, where it is seen as a short cut to wealth, fame that is not earned as a result of personal achievement counts for little. Twenty Somethings do not crave fame for two reasons. Firstly, because they do not equate fame with respect (in many cases quite the reverse) - and they have a strong desire to be respected for what they do. Twenty Somethings do not admire the fame that comes purely from media exposure, particularly that from reality shows like Big Brother. And, secondly, because fame would restrict the personal freedoms that they hold so dear, and leave you dependent on what others think. As we have said, these Twenty Somethings are much more concerned with self-evaluation. As the gap between celebrity and non-celebrity has narrowed, the value of celebrity has decreased. A combination of reality TV and the exposure of celebrities' failings have highlighted the similarities rather than differences to the rest of us: "They aren't so special", "We aren't so ordinary." And so people today see fame more as a matter of luck than real talent and have turned their back on celebrity in favour of something more valuable. Respect. There are important lessons to be learned for celebrity endorsements. The more celebrity loses currency, the more consumers are likely to respond to communication which emphasizes the talent that created the celebrity in the first place. There is a growing need to show the talent and skills that made the celebrity famous in the first place, rather than playing only on celebrity itself.



Swedes love the heroic unaffectedness that puts the team above any individual. 70% reject personal fame, the highest level in our survey.

*Making success of what
you love doing is the
ultimate goal in life.*
SANDORINE, PARIS



*I CAN BE WHATEVER
I WANT TO BE,
IT'S NOT GOT NOTHING
TO DO WITH BEING FAMOUS*
JOHN, LONDON



The sleazy side of fame



Nadia, transsexual winner of the UK's Big Brother



EUROPEAN FAST FACTS

.....
Only one in five want to **BE FAMOUS** and the vast majority (three quarters) have no wish to go on a reality TV show.
.....

Russians and Italians see fame as a **SHORT CUT TO SUCCESS**: 41% of Russians want to be famous; one in three Italians are drawn to reality TV.

*Online Survey by The Wire for BBDO Europe

208mins

SP

REC

00:00:02



Technology

*TECHNOLOGY ENABLES
ME TO DO THE
THINGS I WANT TO DO.
BUT IT DOESN'T
MAKE ME WHO I AM*
SAM, 28, UK

Technology is so integrated into the lives of this generation that much of what it offers is taken for granted. To them technology is no more than a tool that enables their Me Project and boosts confidence in managing it successfully. Constant advances in technology have helped this generation become more empowered than those before them.

Technology has made high-speed living possible for this generation, allowing them to rapidly pick out what they want, get it and consume it. It has also helped them to travel further, and work smarter, faster and anywhere they want. It is an integral part of the way this generation lives, and its impact will be even stronger for the upcoming generation – today's teenagers.

Contrary to previous concerns, Twenty Somethings do not seem either addicted to or isolated by technology. Quite the opposite. Online games, in particular, form part of a much richer world of role-play where your identity is extended to create a highly interactive personal experience.

Furthermore technology has gone so far as to become a new way to link people together making new communities possible. One in two people say they have made a friend online even though no-one thinks technology has made them better at making friends. Because we can be connected to others 24 hours a day, across massive distances and in real time we can make use of networks for social and work life, and become part of new communities. The phenomena of flash mobbing, cult-like in Italy and Germany, may turn out to be passing fads - but this generation will continue its social experiments with technology. Chat rooms, online dating, speed dating, even online versions of classic games like poker are set to flourish.

These new techno-communities are one of the biggest opportunities for brands. If a message is well targeted through online and mobile channels, this generation will have the ability to take control of it and diffuse it among peer groups. The result will be a buzz that no mainstream media can achieve. Some brands like Puma have been using technology in this way to create a unique connection with the audience.

Technology also opens up new ways for people to express themselves creatively. Even if no Twenty Something thinks that technology makes you more creative, they recognise that new ideas may come to life more easily and in a different form. British group 'The Streets' put together its first album for a reputed 1500 euros with the help of free software - but the creative inspiration was all the artist's. Technology brands in tune with their audience acknowledge their role is merely to empower and avoid taking credit: Sony uses the line 'You make it a Sony', Wandaoo identifies a new 'Positive Generation' without claiming to have been instrumental in creating it.

This role of 'enabler' will be more and more the key role that technology brands should embody, always keeping in mind the need to create new experiences in which 'I am the hero', a creative, talented, powerful and respected hero.

*I've spent a lot of time
on eBay, I believe it's
creating a cultural revolution*
SAM, LONDON



Flash mob pillow fighting at St. Pauls, London

THE OBSERVER
Thursday 20 Jan 2011

NEWS



'Flash-mobbers' do the rush-hour waltz as new craze of mobile clubbing moves into Britain

Call me up – I'm
virtually yours...



Seeing and being seen



Playing with technology

SPEEDDATING: 4 MINUTES CLEARLY
ISN'T ENOUGH TIME TO GET TO KNOW SOMEONE
BUT IT IS ENOUGH TO DECIDE
WHETHER YOU WANT TO MEET THAT PERSON AGAIN

JOHN, LONDON



Meet my alter ego, Sam the
Spaceman, London



Technology meets art

EUROPEAN FAST FACTS

MAKING FRIENDS online IS widespread:
47% HAVE DONE SO. NOW IT IS THE
MINORITY (44%) WHO HAVE NOT.

Young people in work are more likely than
students to reject **ONLINE FRIENDSHIPS**
(38% compared to 28% disagreeing)
suggesting the trend will grow. Women,
perhaps fearful, are more resistant.

*Online Survey by The Wire for BBDO Europe



Soul Beauty

THE IDEA THAT RECREATIONAL
DRUGS ARE A NORMAL
PART OF MODERN LIFESTYLES
IS WIDELY REJECTED.

We might expect a generation so inundated with messages about health, beauty and wellness to be either obsessive or very confused. Neither is true. All across Europe, this group understands that they and only they can take responsibility for their wellbeing. This responsibility goes well beyond the superficial desire to be slim, beautiful and youthful. It is an acceptance that the whole package - beauty, health and happiness - is within their grasp.

FAR FROM BEING A GODLESS
GENERATION, 40% BELIEVE
THERE IS A GOD WHILE 38%
THINK NOT.

So what is their approach? As we saw in 'Mixing Things Up', Twenty Somethings enjoy experimenting with their bodies, and talk about 'celebrating the body' and say 'this is my body and I will do what I want with it'. This is true of both women and, to a growing extent, men. The metro sexual phenomenon of urban males with a strong aesthetic sense is familiar enough in France, Italy and the UK. Now their counterparts in Eastern Europe and Spain are racing to catch up.

Like previous generations, Twenty Somethings are largely dissatisfied with their appearance. But the good news is that they feel they have the power to act upon it. Most are not happy with their bodies, over half want to change it and one in five of admit to wanting plastic surgery.

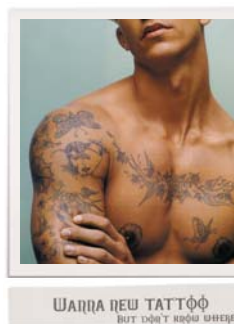
Young people today believe wellbeing depends on balancing extremes of behaviour. They are less likely than previous generations to live by a single set of rules, neither living solely for the moment nor treating their bodies as temples. Instead each individual picks and chooses from what they know about diet, exercise and relaxation, but all laced with doses of unhealthy fun.

So our Twenty Somethings remain committed to heavy-duty nights out, just not all the time. Partying hard at the weekend is followed by detoxing in the week. Weeks of impulse eating are interspersed by a few days on the South Beach Diet and stints at the gym.

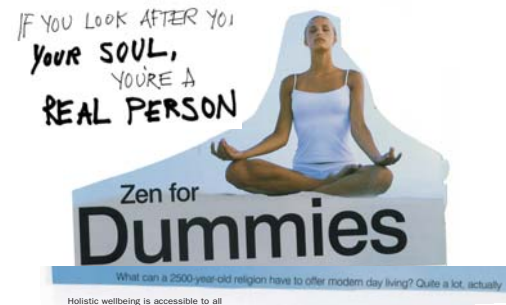
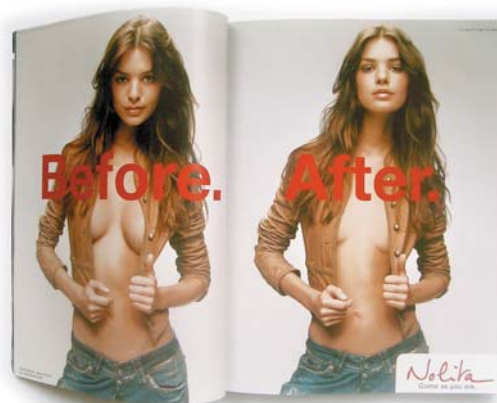
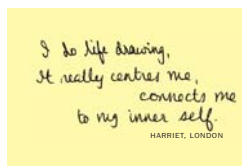
The first important point for brands is that healthcare and wellbeing is a very serious subject for Twenty Somethings: they spend a lot of money and a lot of time on it. However, there is no single solution. Each individual wants to make their own cocktail of health care products to suit their individual needs. To put together their own personal mix they will absorb information from any source so long as it does not feel patronising or preaching. Their cocktail might include all types of food: fresh, organic... and a new generation of functional food.

More fundamentally, the new health revolution lies in the holistic view that this generation takes. They do not separate beauty, health and spiritual aspects of wellbeing. This attitude drives a strong desire for feel-good experiences that sooth the mind and body simultaneously: spa treatments, trips to the countryside, alternative therapies and yoga. This concept is illustrated in advertising by British retailer Boots that reads 'Wellbeing is... making time for me'.

Taking care of their "soul" becomes the new way to be healthy. Their confidence leads them to make their own "religion", picking up anything and everything that will help them take care of their wellbeing.



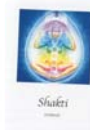
Playing with soul beauty



In search of perfection



Organics are part of the soul beauty cocktail



Shaktiastic

EUROPEAN FAST FACTS

Today's young adults are not satisfied with what they have achieved so far. Most are not happy with their bodies, over half want to change it and one in five of admit to wanting **PLASTIC SURGERY**.

Room for improvement: Only 47% feel **COMFORTABLE IN A SWIMMING COSTUME** on the beach, a modest 32% of Germans but confident Russians - two thirds do.

80% reject **RECREATIONAL DRUGS**, only Britain bucks the trend, but even so rejecters outnumber users 4 to 1.

*Online Survey by The Wire for BBDO Europe

New Citizenship

TWENTY SOMETHING
EUROPEANS ARE WILLING TO
FIGHT FOR A CAUSE THEY
BELIEVE IN, MUCH LESS SO
THEIR COUNTRIES.

This generation is not interested in revolution. They know they can't change the world and are sceptical of mass political engagements, large scale collectives and the commitments of governments, NGOs and companies.

However Twenty Somethings are willing to take part in concrete, localised actions with small, real steps in which they can play a direct part. Without, of course, much substantial sacrifice of time or convenience. And they expect companies to shoulder social and environmental responsibilities on their behalf.

"WORKING IN A CHARITY IS MY
WAY OF GETTING A BROADER
PICTURE PERSPECTIVE AND TO
BECOME MORE TOLERANT"
SANDRINE, PARIS

A new model of citizenship can be seen emerging: pragmatic citizenship. As pragmatic citizens they are unmoved by ideology and lifetime causes, but will act with determination on issues that matter personally. Demonstrations against Iraq were tellingly under the banner "Not in my name." If their quality of life or rights are infringed they will make a stand - for example against proposals to curb rave parties. Despite being often viewed as apolitical, four out of ten under 25s have demonstrated in the street at least once (twice the proportion of the previous generation). 58% say they are willing to engage in local issues.

Brands have an opportunity to connect with this generation by saying clearly what they believe in, their values and vision of the world. Most importantly, they need to act on these beliefs with visible, practical actions and a minimum of hype.

But Twenty Somethings are open to welcome back companies who make mistakes, apologise and make amends (always providing their products are still attractive). Think Nike, which having addressed the issue of child labour is once again the product of choice. "The anti globalists in Geneva were all wearing Nike." Michelle (23) UK.

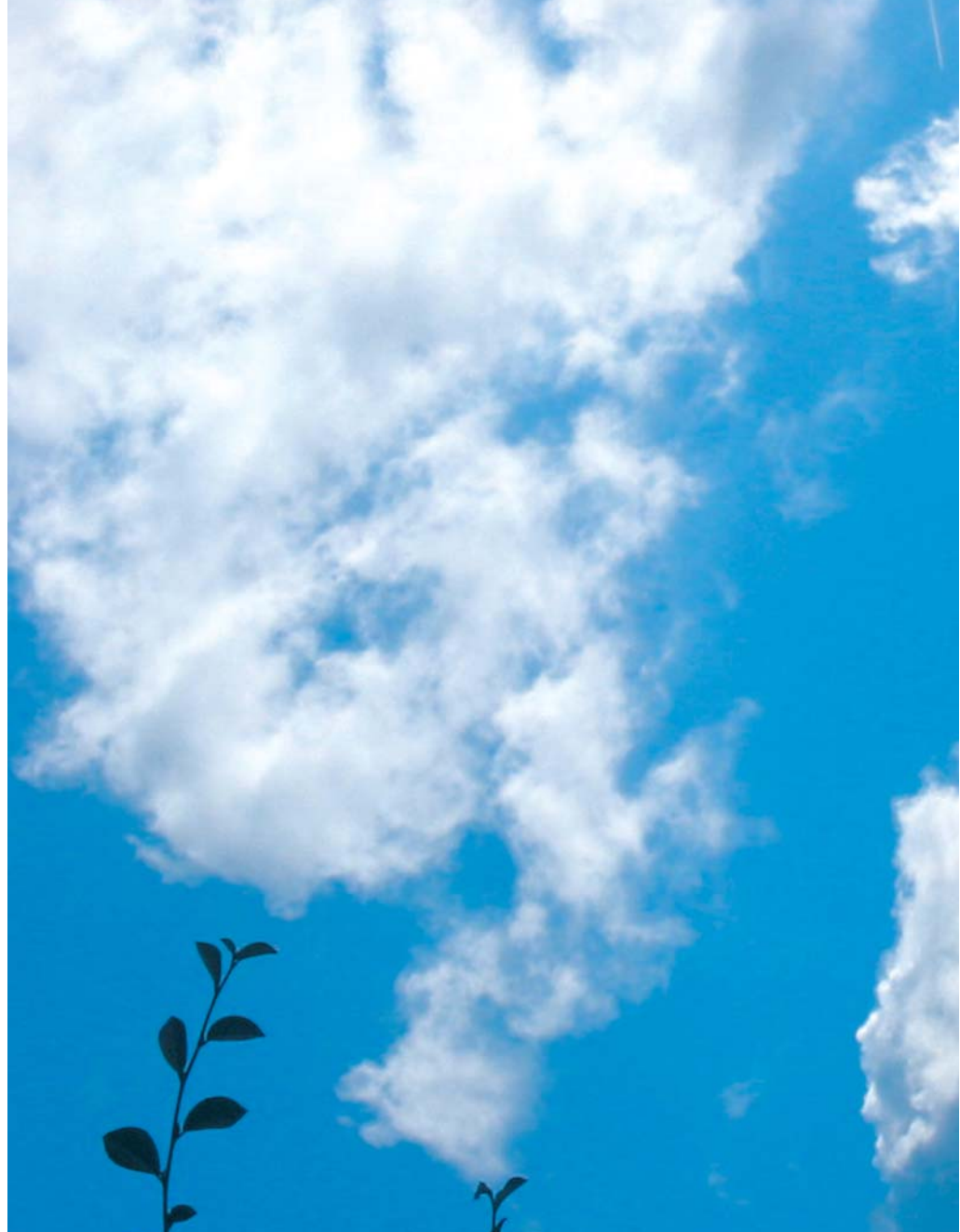
But for brands to really demonstrate pragmatic citizenship, the product and services they produce need to be less "What is good for the planet is good for me" and more "What is good for me should be good for the planet." This generation will not compromise or sacrifice comfort and pleasure. What they want and expect are product experiences which fully reconcile personal and collective benefits. Starbucks is cited as a good example of a company that provides a complete consumer experience, mixing pleasure, conviviality and responsibility to create a feel good moment.

EUROPEAN FAST FACTS

81% would fight for a cause they believe in and 58% are prepared to engage in local issues, but only 38% are willing to **FIGHT FOR THEIR COUNTRY**. The Spanish are most involved in causes, Swedes the least. Russians most likely to fight, Germans the least.

Half think **ANIMAL RIGHTS** are as important as human rights. Despite or because of bull fighting, Spaniards top the list at 69%.

*Online Survey by The Wire for BBDO Europe



THEY SEEK BALANCE. A THIRD
DO NOT WANT TO WORK
AS HARD AS THEIR PARENTS.
DOING WELL AND TAKING
EARLY RETIREMENT APPEALS.

An implication of this trend is that Twenty Somethings are not willing to tough out bad experiences – unless the experience offers them some concrete reward. They will leave a job they dislike unless it meets a short term goal or is a valued experience. They are fast to complain and do not want to be a victim of circumstances beyond their control and, as we have seen elsewhere, they are quick to make changes to get what they want or avoid what they do not.

This focus on multiple, interesting experiences that we have explored earlier is also seen here – note the huge rise in the number of people who are taking extended periods of leave from work to travel. Again and again we found a willingness to sacrifice wealth for quality of life and not only within the strongest economies – in the Czech Republic an overwhelming 91% want to take time off to travel.

This has implications for brands, retailers and financial service companies. Twenty Somethings need excellent money management systems to enable them to save for that extended trip or time out of paid employment. Customers cannot be cleanly pigeon holed as being of the right social economic group for a brand. Indeed luxury stores that make less wealthy potential customers feel ill at ease will lose out. From a corporate point of view, this is a generation that has never known a world without email and mobile telephones. They believe they can do anything from anywhere and accomplish a number of tasks simultaneously. Flexible work and remote working are assumed to be a norm. This has huge implications for the way that businesses are structured to welcome the next generation of the workforce.

WITH 1000€ I WOULD OPEN A SAVINGS ACCOUNT
OR INVEST IT ON THE STOCK MARKET.
I WOULD KEEP A SMALL AMOUNT OF IT
TO BUY A QUAD.



A third do not want to **WORK** as hard as their parents. But the same proportion, and 40% of British, French and Germans are quite happy to.

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Doing well and taking **EARLY RETIREMENT** appeals to 42%, more so in the UK and France, less so in Russia and the Czech Republic.

*Online Survey by The Wire for BBDO Europe



Conclusions

Above all, this research suggests that many of the established marketing structures that we have long adhered to are flawed when set against the values and behaviour of this new generation of consumers.

For years, we have defined our target market by age, demographic and lifestyle. Those definitions may still have value, but they are all about fixed points and specific criteria. Today's Twenty Somethings mix up their identities and refuse to be pigeon holed. As we write creative briefs today it is more important to establish their relationships to categories and brands than to isolate a lifestyle or socio-economic group.

It is important to always remember that their relationship to brands has changed: from the 80s focus on status, to 'No Logo' and the rejection of labels to the current real enjoyment of brands. Twenty Somethings love their brands! But they have a different relationship with them.

They come to a brand not so much because of what it does for them, as for what it stands for and the values it embodies. Because they have such a strong sense of themselves they use brands to enrich or illuminate facets of their personality rather than to provide them with an identity. While we will always need consumer insights to fuel our communication, we may have reached a point where advertising should focus as much on what a brand stands for as what role it can play in its users' lives.

The brands which connect successfully with this target today are those which seem already to have begun to change their own way of thinking, and evolved the bedrock tools and language with which they work. It's a new way of thinking that involves re-thinking the WHO (the brand identity), the WHAT (the brand proposition) and the HOW (the brand connection) of consumer communication.

- Brand identity today is about more than who you are; it's about what you stand for. What consumers seek is a strong Brand Spirit, one that allies a clear *raison d'être* with deeply held convictions and unique values. That kind of spirit resonates with a target thirsty for a clearly expressed identity and point of view. And in its turn can guide all elements of Brand expression from boardroom behaviours to point-of-sale.
- From conventional selling proposition to experience catalyst. These consumers are open-minded and experimental. They are on the look out for new experiences and new opportunities to learn more about their world and themselves. They have vivid imaginations and seek colourful lives. It's an added value existence – and that in its turn is very much the role that brands today set out to fulfil.
- From Talking to consumers to Connecting with them. From dealing in one-way communication, to brokering a genuinely shared, but personally created, meaning. Twenty Somethings need to assimilate, process and create meaning from a message to make it properly their own. But, once their imaginations are properly engaged, they can also become a kind of informal and self-selecting media channel: viral marketing today has barely scratched the surface of their potential role as a community of message carriers.

Brand Spirit, Experience Catalyst, Active Connection: It's a new language for a new generation of consumers. One that promises an exciting future for brands, brand owners and consumers alike.