

# Common denominators: what unites global youth?

**Tim Stock** and **Marie Lena Tupot**, scenarioDNA, detail their research that has found, when it comes to youth the world over, the process of ‘becoming’ strikes a common hunger for participation and access. This analysis allows marketers to segment youth culture across a four-quadrant lifestyle matrix

**G**LOBAL YOUTH is a ripe and growing consumer base, with more than \$100 billion in spending power. According to the American Marketing Association, the youthfulness of many other countries – especially in Asia – far outstrips that of the US, where only 21% of the total population is aged 14 and younger (for example, in India 35% of the population are 14 and under).

There are emerging similarities in youth culture across the globe, in particular technology is a focus. The brands and styles preferred by youth around the world are surprisingly alike. The more exposure young people have to common information, for example through the internet, the more homogeneous they appear to become.

Further, no matter where they are – the US, Ukraine or UK – the youth of the world are all deeply immersed in a process of ‘becoming’, that is becoming who or what they aspire to be. War and politics aside, most young people are concerned with who they are and what they will be in the future.

If we can decode the emerging behavioural patterns of this generation now, we will have established a foundation for the future – a body of research that enables us all to better understand Generation Y as its members age into their 30s, 40s and 50s.

To get beyond a generalisation of youth, identify their underlying drivers, and find actionable differentiation, we have dissected youth culture

according to a lifestyle matrix (see Figure 1). This is a cultural overlay that segments youth aged from 14 to 24 years into four categories: those driven by an all-consuming passion for individuality and instant gratification; those driven by a bleeding-edge thrill for notoriety and adrenaline rush; those who live to deconstruct, mobilise and incite revolution and those who follow tradition to the letter in the quest for acceptance and status.

Being instantly connected to like-minded friends and social networks is a priority in the life of a young person. Connections help move them closer towards ‘finding’ their identity. That said, their ties to media consumption are critical. The part that keeps marketers guessing is that different groups modulate and process marketing messages differently. Each segment follows a distinct model of media consumption. If we consider demographics to be old-school marketing, then patterns of media consumption can forge the path as the new dividing line among consumers. We need to be looking at how technology can best amplify the social context of mob/lifestyle groupings.

We believe that too often marketers market only to traditionalists, those most likely to respond to conventional marketing techniques. But, when it comes to global youth today, we are dealing with a highly cynical group of consumers who instinctively shut out obvious messages.

In one research study, marketers found that, having shown a product placement clip to kids,

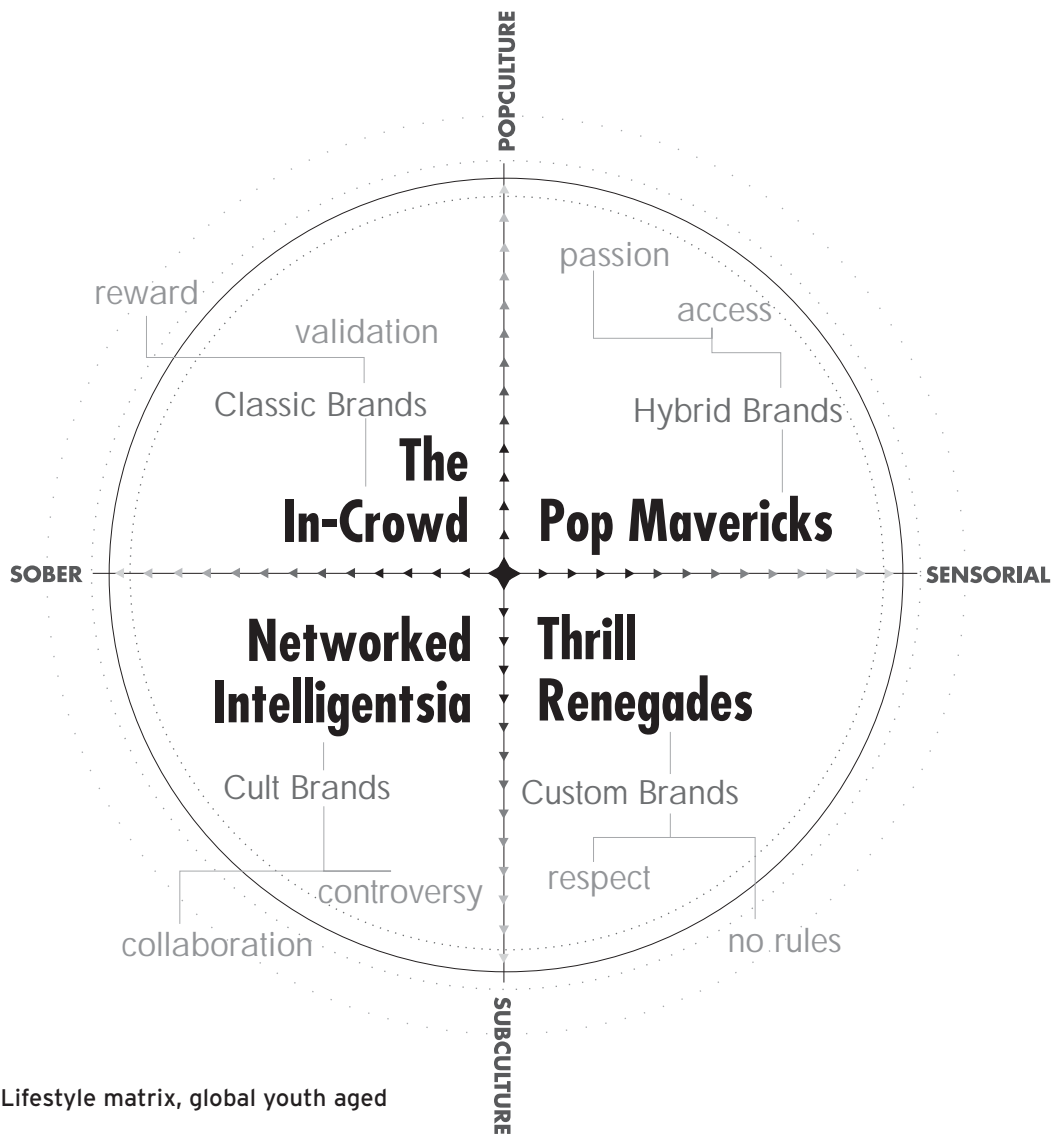


Figure 1: Lifestyle matrix, global youth aged 14-24.

the children typically chose the brand not featured in the clip. Looking outside of traditional consumer behaviour holds the key to gaining brand momentum before the moment of opportunity is lost. Trends begin far outside the realm of the traditional Gen Y consumer. By the time it reaches this quadrant, a trend is already over.

Finding alternative catalysts to reach young people is far more compelling. Getting into the heads of these unconventional consumers by looking at the niche markets and mobs they cre-

ate for themselves allows us to get in step with their respective worlds, their social networks, and their language and establish an authentic view of the Gen Y consumer.

**The underpinnings of the matrix**

Typical Gen Y-ers move and morph across the quadrants of the matrix as it suits their needs, with each choice they make reflecting the complexities of who they are. Taking into account



Bruce Boyajlian/Focused Images

Hilary Duff - in with the 'in-crowd'.

behavioural nuances according to culture, the matrix has stood up across continents.

The consumer models within the matrix are classified into the lifestyle categories of the in-crowd, pop mavericks, networked intelligentsia and the thrill renegades. The mob profiles within these categories are not your average users but specific characters that function as influencers among those in the related group.

### The in-crowd

For the in-crowd – where higher authorities are sought for sanction – it's all about cocooning, privilege and reinforcement. They typically seek approval when communicating. Classic brands such as Nike and Abercrombie & Fitch endorse their beliefs. They desire brands that maintain provenance and uphold tradition. Respected in-

crowd influentials include American adolescent soccer player Freddy Adu, and Disney's coming-of-age actor Hilary Duff.

Within the in-crowd quadrant, niche mobs all over the globe share common patterns and prevalent behaviour. All have deep-rooted traditions in their respective cultures. There can be controversial aspects to some these traditionalists, for example bull-fighters in Spain, but these are downplayed in favour of the long-standing forum they provide for achievement and status.

### Pop mavericks

For pop mavericks – where word-of-mouth spreads like rapid fire – it's about passion, individuality and instant gratification. Passing word from peer to peer, their communications are viral. Hybrid brands including Diesel and Adidas allow them to personalise their choices. The roots of product innovation lie here. They create the products they want around their passions. Well-known and respected pop mavericks include singer/designer Gwen Stefani and second-generation surfing legend Laird Hamilton.

Niche mobs within the pop maverick quadrant might include BASE jumpers, skateboarders and rock stars. They live for recognition and perfecting their technique. Their communities allow and encourage them to hone their skills. They feature peer-to-peer forums that connect them to those that might inspire them. For example, the Australian BASE Association website includes a chat forum for jumpers to keep in contact.

### Networked intelligentsia

For the networked intelligentsia – the hub of online social networks – it's about revolution, creativity and deconstruction. Cult brands such as Vespa (in the US) and Vans contribute to their sense of obscurity. Retro brands are fuelled here through ongoing commentary giving them new life. They use communication tools to broadcast their messages.

Influential members of the networked intelligentsia include arrested Belgian hacker

Gigabyte and record producer DJ Danger Mouse, the author of an unauthorised album-length mash up project called *The Grey Album*, (the vocals are from Jay-Z's *The Black Album*, and the musical bed is a highly processed and reorganised version of the Beatles' *White Album*).

Niche mobs to compare within the networked intelligentsia quadrant might be 'gold farmer' gamers, who collect in-game currency for the express purpose of selling it to other players for real world currency, new anarchists who shun big brands, and graffiti taggers. Members of these groups strive to impart their subversive views and unseat the establishment.

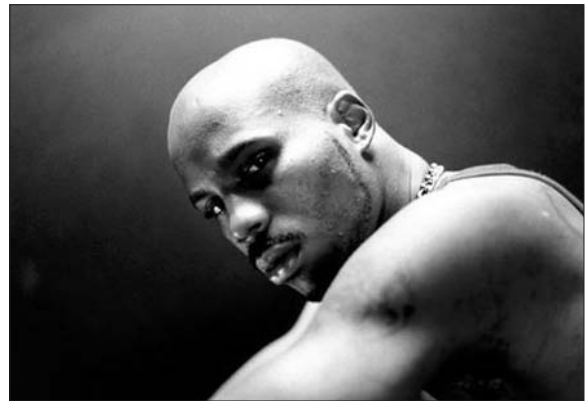
Even within quite specialised niches, the quadrants of the matrix may be seen to overlap. The affluent online gamers who buy from gold farmers fall into the in-crowd, where gaming status reflects their self-worth. They will suffer any consequence to attain acceptance.

### Thrill renegades

For thrill renegades – for whom law and order does not exist – it's about infamy, adrenaline and anarchy. They communicate to build notoriety. They connect to the in-crowd by co-opting the provenance of in-crowd brands (such as Tanqueray and Timberland) to command respect, and then taking the brands to another level, magnifying their credibility. Influential thrill renegades include former Bronx street kid, retired rapper, and now actor DMX, and extreme wrestling group Insane Clown Posse.

Niche mobs within the thrill renegade quadrant might include football hooligans and street

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Thrill renegade DMX.

racers. Their extreme lifestyles lead them to deviant, often destructive behaviour. This violence in sports has a long history.

Keeping the rush going today, Italian fans created a particularly fanatical brand of football support known as Ultras, now a major force in the Italian game and prevalent in a few other European countries.

### Choosing the right influential

The lifestyle quadrants reveal a world that requires marketers to look at a range of evolved and influential types. The growth of custom markets and a propensity toward insular, yet instantaneous communication, shape how Gen Y-ers respond to the influentials in their world.

No longer is there a one-size-fits-all influencer. We need to be mapping influential behaviour through several different niches. If a marketer presses that one traditional influential button, at some point the brand message hits the proverbial brick wall. Each influential has a different line of sight. For a brand owner, the implications of choice of influential resonate loudly, particularly when it comes to celebrity endorsement and product placement.

Marketers must choose a celebrity that has a genuine resonance with a product, and will not alienate existing customers. With Gen Y armed with access to worldwide media, the global implications of the choice of influential run deep. If a

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global brand chooses a celebrity from a particular country, the celebrity need to be respected in countries on the other side of the world as well.

To set off a positive and sustained chain reaction, marketers need to start at the right point with knowledge of prospective niches and considering the modality of the campaign wherever the brand goes. All of a brand's layers of influence must work in tandem with each other.

So if a marketer of a pop culture brand wanted his brand to reach a subculture crowd, he would need to find an influencer that maintains credibility in both the pop and subculture arenas yet held its own in each – wherever they are in the world. Pop culture aficionados would be looking to an influencer that inspired them or gave them access to the inaccessible. The subculture would likely want a role in the selection process. The traditionalists would want to know that the influencer sanctioned the brand whole heartedly.

Embracing the right influential allows for connections that work within a brand's existing identity and beyond.

### **The foils of earlier years**

It used to be that being a teen was the last bastion of reckless abandon before the harsh realities of adulthood set in. Yet no matter which lifestyle grouping a Gen Y-er falls into, we have witnessed childhood icons continuously surfacing through

our research. This demonstrates two things. For one, the search for identity does not begin once a kid becomes a tween. The inclination begins early on. Second, the move from child to teen to adult has expanded its scope giving kids a more extended juvenile period. The demarcation across youth stages is less defined than ever before and this phenomenon is universal.

Consider the 'twixter' phenomenon reported in *Time* magazine: 'They're not kids anymore, but they're not adults either.' The report discusses similar occurrences of unmarried young adults job hopping and living at homes: 'Boomerang Kids' in Canada, 'Kippers' in the UK, 'Tanguy Syndrome' in France, 'Nesthockers' in Germany, 'Mammone' in Italy and 'Freeters' in Japan.

The phenomenon has its roots based in economics, but is facilitated by a closer bond with parents. It is also being compounded by the way in which Generation X parents embrace nostalgia. In essence, Gen X is reinforcing a cult of merchandising that has emerged within Gen Y.

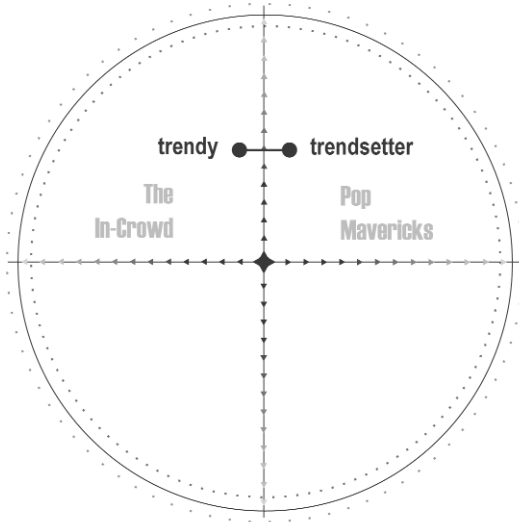
Kids today do not cut off their youth when they become adults. In fact, they are expected to nurture a healthy relationship with aspects from their childhood. Think *Star Wars*, *Transformers*, Hello Kitty, *Pokémon*, *Super Mario Brothers*; college kids watching *Teletubbies*. Remnants from earlier childhood years become relevant in new ways, rather than discarded.

Young people are far more participatory with the brands they choose to keep around themselves. Via Nickelodeon, Viacom, Cartoon Network and MTV, there a great variety of media content out there, available 24/7. There is no reason for young people to shut out the old. There is room for ever kind of brand in whatever form young people morph it into, provided it's accessible when they want it.

### **Localising messages, or not**

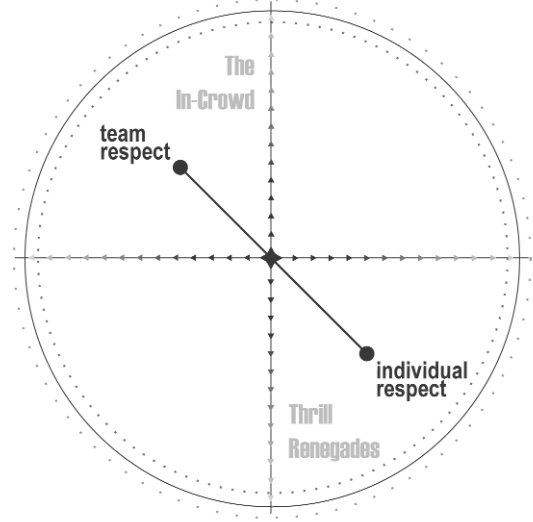
We can expect trends in buying habits to become even more prominent as cultures collide and collaborate through increasing exposure to

In-Crowd / Pop Mavericks Synergies



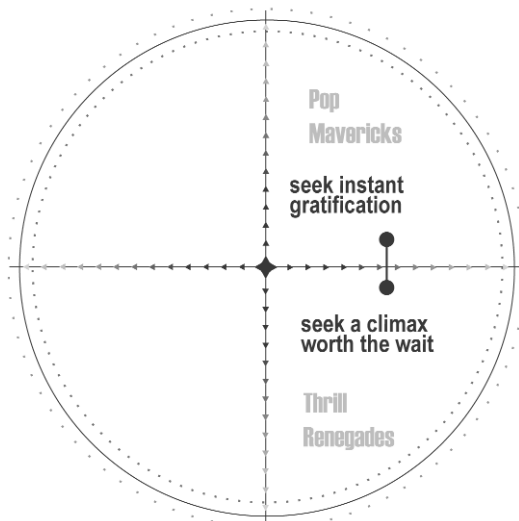
**In-Crowd versus Pop Maverick**, both desire to be in style, the former prefers a style once it's been cultivated and accepted while the latter breaks ground and sets style in motion.

In-Crowd / Thrill Renegades Synergies



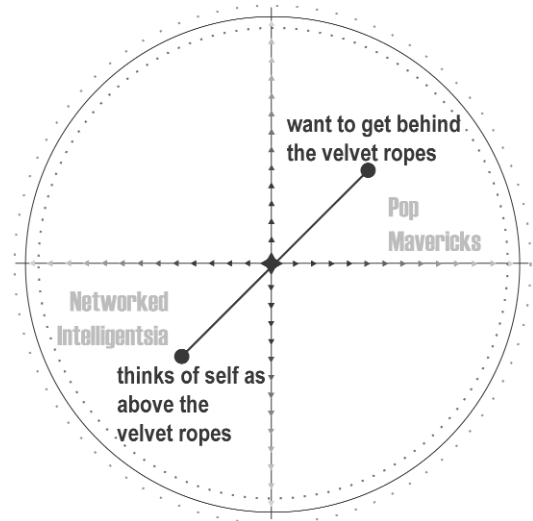
**In-Crowd versus Thrill Renegades**, both seek respect, the former seeks respect as part of a team while the latter seeks individual respect.

Pop Maverick / Thrill Renegade Synergies



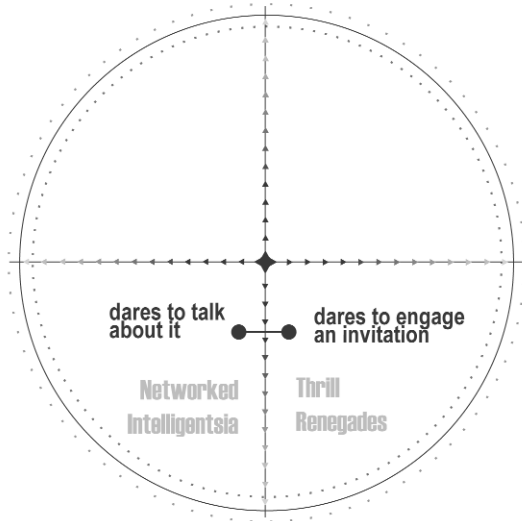
**Pop Maverick versus Thrill Renegade**, both are passionate, the former expects instant gratification while the later will hone and cultivate their passion.

Networked Intelligentsia / Pop Mavericks Synergies



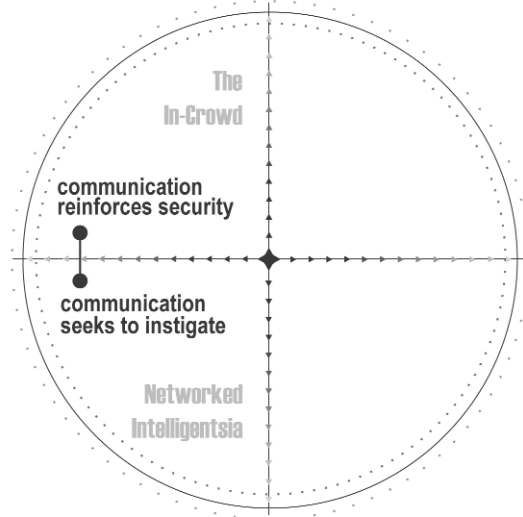
**Pop Maverick versus Networked Intelligentsia**, both find attraction in the inaccessible, the former seeks access to it while the latter wants to embody the concept.

Networked Intelligentsia / Thrill Renegades Synergies



**Thrill Renegade versus Networked Intelligentsia**, both live for revolution, the former takes it on while the latter broadcasts the concept.

In-Crowd / Networked Intelligentsia Synergies



**In-Crowd versus Networked Intelligentsia**, both thrive on communication, the former to gain approval while the latter communicates to project their thoughts.

media and travel. But that is not to say that all brands will thrive equally in a global world.

Brands such as iPod and Red Bull stretch across the world maintaining their cult status and gaining fervour by word of mouth. We see these brands as belonging within both pop- and sub-culture.

However, more traditional, legacy brands such as Abercrombie and Timberland require shepherding and handholding from their parent companies in order to maintain penetration. Their consumers are not proponents of peer-based communication.

## Communication

Whereas a mobile phone is the primary hub of pop maverick communication, mobile phones would fall secondary to the internet for the networked intelligentsia. Their sources of information differ as well. Research from our most recent IGNITE!/youth report shows when it comes to mobile phone purchases, for exam-

ple, Gen Y pop mavericks look at a more diverse mix of resources. Fifty per cent cited print, 50% cited online and 50% cited friends. One hundred per cent of the networked intelligentsia group cited friends as their main source of information.

## Food brands

It's also critical to monitor the evolution of brands as they migrate. In 1974 when the first McDonald's opened in southeast London, it was not widely accepted by the locals. It was the company's 3000th restaurant, yet still a deviant choice for Britons who favoured the homegrown Wimpy franchise, established in 1954. To date, there are about 300 franchised Wimpy restaurants across the UK. Now, McDonald's, with more than 1,200 restaurants in the UK, is as commonplace as you can get.

Past research also found American teens prefer food on the go, while youth in other countries seem to favour meals they could savour. Our current research has actually found

the American teens patterning after the Europeans. Now they, too, look for comfortable restaurants that allow them to bring friends, get inexpensive good food and stay for a while.

American teens are also catching up on SMS. Not too long ago, text messaging was the domain of teens in Europe and Japan. Not true anymore.

### A tricky cycle

The more elusive a sector youth becomes, the more marketers push to reach them. Alienate youth as they are searching for their identity and maturing in their brand choices and your brand is dead in the water. The key is to empower young people, allow them to choose a brand that is ‘naturally’ exposed – rather than forced upon them. This requires looking at youth as evolving consumers and exceeding their expectations.

Generally, kids crave information. They want to know about bands they would love, how to find others like themselves, how to find the greatest places to be seen and heard. These themes recur all over the world. Brands and technology play a critical role in getting their

answers, but the question is do brands and technology work together in this? By following the patterns of technology use among Gen Y lifestyle categories, brands can seamlessly synch marketing goals with the needs and desires of young consumers in the midst of their evolution from child to adult. A fluid world where marketing messages resound loud, clear and intuitively without pushing is the goal.



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### A note on methodology

Our research is multi-layered and based on semiotic analysis. The task is to reveal the pattern of functional signs and connect behavioural actions to these signs. The research is part of our IGNITE!/youth knowledge bank.

Related to this particular article, we conducted one-on-one interviews throughout 2005 with 100 participants ranging in age from 14 to 24 in the US, UK, Canada, Hong Kong, Germany and Russia.

In collaboration with Snippies, these interviews were conducted in the participant's home, workplace, on the street or during a special interest venue. All interviews were videotaped. No interviews were conducted outside the normal routine of a participant's day.

We also conducted online surveys with 400 Gen Yers in the US regarding their attitudes toward popular products in their everyday lives. To get even further into their heads as they posted off-the-cuff sentiments, we combed message boards, blogs and chat rooms. We also pored through online archives of their photography to best see what they see.

In addition, we talked with 20 leading professionals addressing specialties from finances to parenting as related to Gen Y.