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Shifts in Global Teen Culture

They are hyper-informed. They are worried about the state of the world around them. They believe it won't be easy to secure a happy life, but are prepared to fight for it. In short, they are the next generation of global teens, and they are unlike any generation that came before them.

Certain experiences transform the outlook of an entire generation. In the case of today's 13 to 18-year-olds, events since 9-11 have acted as a shot heard 'round the world. Global conditions changed overnight — from a world filled with the optimism and endless possibility of the Internet boom, to a dark and anxious place threatened by global war and international terror. These dramatic changes could only logically result in equally important shifts in global teen culture.

The GenWorld global teen study set out to explore the recent changes in global teen attitudes, lifestyle and values. Conducted by Energy BBDO in Chicago, GenWorld is the largest and most comprehensive public study of its kind in recent years.

Our key discovery: seven seismic shifts that we believe will be known as the hallmarks of a new generation.

1. Zeitgeist: From Optimism to Determination in a Dark World Far from the exuberant optimism of teens in the 1990s, just 14% of global teens today say, "I think the world is becoming a better place." Yet rather than resignation, teens are finding a new will to fight. They are facing the future with courage and determination. How can brands follow suit?

2. Success: From Entitlement to Self-Activism Forget the "whatever" detachment and sense of entitlement that defined the 1990s. A new attitude reigns in this generation: "I would fight for a cause I believe in." Their number one cause: hope for their own future. Today's teens are striving for mature, long-term goals like security, balance and enjoyment in life. Can brands act as an antidote to the serious challenges of contemporary teen life?

3. The Vanguard of Cool: From USA Teens to Creatives American teens once represented the vanguard of global youth culture. But in today's world where authenticity matters most, a new group of teen leaders has emerged. Defined more by values than geography, Creatives are curious, altruistic, open to new ideas, and actively engaged in creating youth culture. How can brands leverage their one golden rule: express yourself?

4. American Teens: From Edgy to Traditional Where the last decade of American teen culture seemed dominated by gritty urbanism, American teens today poll among the most conservative in the world — valuing religion, hoping to get married and become parents and striving to live by high moral standards. How can brands authentically tap growing conservatism in a normally no-holds-barred market?

5. Wired Teens: From an Elite to a Mass Market In the 1990s, being wired was limited to a global techno-elite (wealthy kids in the developed world). Today technology is a hallmark of mainstream cool. How can brands follow the lead of SuperConnectors, teens who use technology to create vibrant social networks and are constantly engaged in a whole new, virtually connected world?

6 ■ Global Brand Leaders: From American Brands to World Brands

While American brands still top the charts in terms of overall awareness, overall likeability for global giants such as McDonald's and Coca-Cola has slipped. A new guard of world brands (including Sony, Nokia and Adidas) seems to be winning teen popularity contests. Why? Evidence suggests they are better equipped to meet the desires of this burgeoning generation.

7 ■ Brands: From Symbols of Status to Drivers of Apathy

Marketers face big trouble: 62% of global teens are apathetic about marketing and advertising. That is, they are not anti-brand, but perhaps more dangerously, they just don't care — don't care about wearing brand logos, don't believe advertising, and feel there is too much advertising in the world. For a brand, is taking a stand yourself the only way to get a rise out of this generation?

Our take: Today's global teens may be fearful, but they still give us cause to be optimistic. Ubiquity of information access may give this generation greater equality of opportunity. Their passion and determination may mean a greater willingness to tackle difficult societal problems. And the rise of social networks may lead to increased interpersonal and global understanding.

Perhaps the sharpest signal this generation is sending is to marketers, whose messages and approaches leave them indifferent. American marketers in particular may need a wake-up call. Only by offering global teens understanding and respect can they expect to leverage the full power of the newly emerging global teen culture.

Determination in a Dark World

9-11, 3-11, 7-7...these numbers are not some strange code, but shared experiences that have created a global zeitgeist for a new generation of teenagers.

Today's teens view their world as a dark and ominous place. Only 14% of teens surveyed agreed with the statement, "I think the world is becoming a better place." Instead of stereotypical teen angst about acne and prom dates, safety issues, war and terrorism top the charts.

Yet fear has not made these teens ready to run and hide. Instead, it's turned them into fighters. The pessimism of Gen X and exuberant self-reliance of early Gen Y has given way to a new ethos: self-activism.

The number-one attitude of teens polled was, "I would fight for a cause I believe in."

What cause is worth fighting for? Evidence suggests it's not abstract social issues or traditional institutions. Many popular social causes of the past, like racism, women's rights and civil rights, rank near the bottom of their list of concerns. Only 11% have political ambitions, a mere 8% want to serve in the military and just 23% consider themselves religious.

What these teens believe in most: themselves and their dreams for a better life. Self-activism drives toward personal, tangible results advancing teens' goals in life.

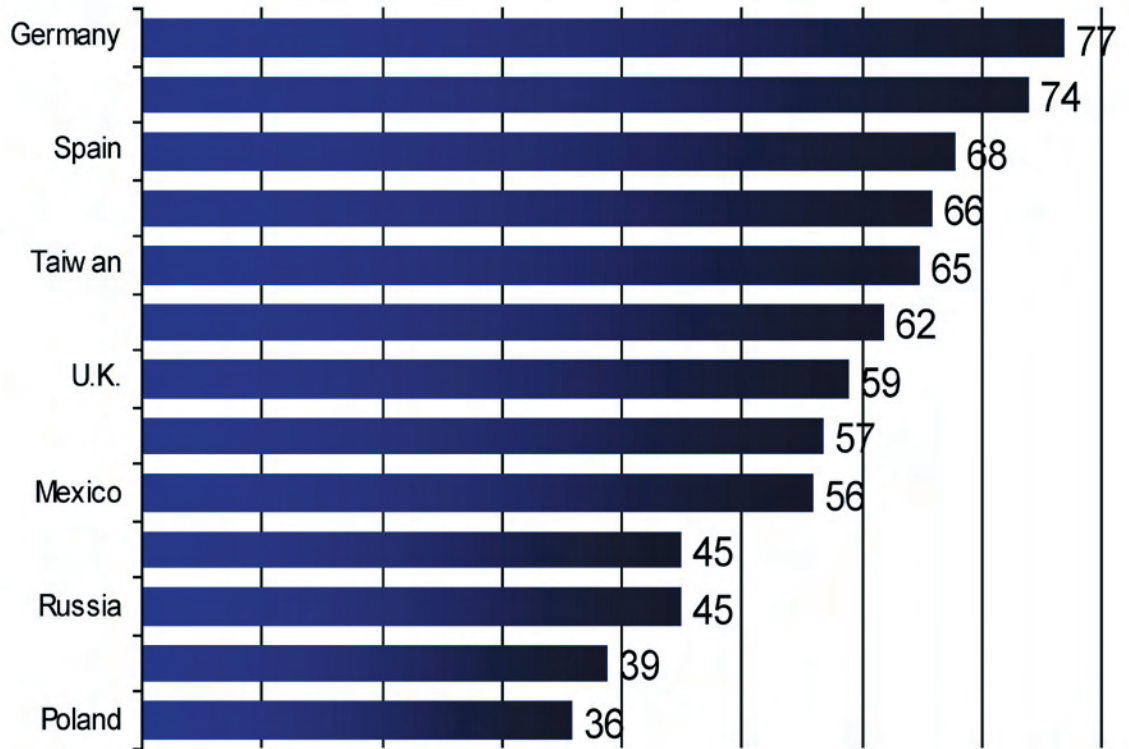
Consequently, it's no mistake that Harry Potter has captured the imagination of this generation. His story speaks deeply to teens who are not looking for grand heroics but for real-world courage, determination and skill to succeed by their wits in a dark, foreboding world.

Implications: The detachment and "whatever" attitude of Gen X and Gen Y will fall flat with this generation. To connect with them, start by fueling optimism. Today's global teens have plenty of exposure to negatives, and appreciate being entertained, empowered and engaged.

Demonstrate that your brand believes passionately in something important – a cause, a philosophy or a mantra. Brands that have a difference-making purpose in the world are more likely to have a lasting place in their lives.

Fight for a Cause I Believe In.”

“I Would



Entitlement to Self-Activism

Gen X made “slacker” a household word. Gen Y expected to be Internet millionaires by age 25.

GenWorld, by contrast, is obsessed with something different: their future security.

“Being financially secure” is a concern for 70% of teens around the world. In fact, in 8 out of 13 countries studied, being better off financially than their parents, being financially secure or being rich was the number-one ranking life expectation.

Does this suggest a new generation of hard-driving over-achievers? Not necessarily. Teens today are redefining the good life. They view money as a means to an end rather than as an end in itself.

Findings suggest that teens’ financial ambition is a practical means to protecting their families, creating security and having the freedom to enjoy life.

In fact, “Enjoying life and doing things because I like them,” was among the most important guiding principles in their lives. Meanwhile, only 34% of teens cited ambition and aspiring to get ahead as important personal values, and 78% disagree that in seeking a job, money is more important than personal fulfillment.

Interestingly, 50% expect to own a business, but only a third expect to be senior business executives.

Companies today must address teens who crave financial security, but also want a well-rounded life.

To do so, they need to recognize the nuance, sophistication and many goals of teen life. Unlike their predecessors, many generations of which have been faulted for choosing immediate gratification over the long-view in life, many teens today have their eyes on a higher prize: balance and enjoyment in life.

In their dark and dangerous world, these simple dreams – for security, balance and enjoyment in life – will take super-human focus and determination to achieve.

Implications: Teens grappling with these issues must be approached with sophistication and sensitivity, not hype. Instead, empower them and entertain them. Become an antidote to the very real challenges of their lives.

#1 Ranked Life Expectation

Money, money, money

COUNTRY

EXPECTATION

U.S.	Be financially secure
U.K.	Make my family proud
France	Be financially secure
Australia	Be financially secure
Germany	Be financially secure
Spain	Make my family proud
Taiwan	Find a soul mate
Poland	Be rich
Brazil	Be better off financially than my parents
Mexico	Earn an advanced degree
China	Own a business
Russia	Be better off financially than my parents
India	Be rich

From USA Teens to Creatives

In the 1990s, you only had to look one place if you wanted to find the coolest teens: the USA. They were the most technologically advanced, their style was envied, their brands coveted.

After a thorough analysis of the GenWorld data, we came to a surprising conclusion. Today, the most leading edge teens are defined not by country of origin, but rather by their personal values.

In fact, one group of teens with a particular values orientation appears to be at the epicenter of the trends that define this generation.

We call them Creatives, a group that is curious about the world, altruistic, and highly open to new and innovative ideas. More than other teens, they enjoy expressing themselves through personal web pages, art, music, writing and design.

In a world where individuality matters most, Creative Teens are leading the way, redefining cool as we know it. Unlike cool kids of the past, they eschew external appearances (only 9% value looking good) and the majority are highly apathetic about brands (only 37% say they “like wearing brand logos” and 64% believe there is “too much advertising and marketing in the world”).

Why do we consider them the vanguard? They are the most technologically advanced teens. Nearly 70% go on-line every day or almost every day. They are much more likely than other teens to IM, email,

or use a search engine every day. And they are leading the huge trend toward original content creation that includes blogging, personal websites, personal networks and personal media creation.

They epitomize the attitudes that define this generation. For example, these teens nearly universally embrace the study’s #1 attitude: “I would fight for a cause I believe in” (70% agree).

They are more innovative than other teens studied. They are the most likely group to say they “are among the first to try something new,” and to value curiosity, creativity and freedom.

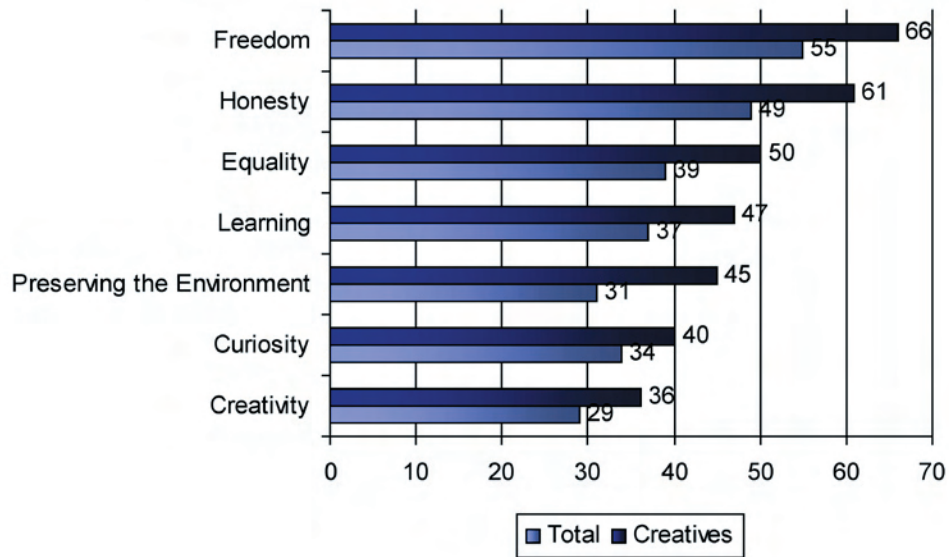
Creative Teens are present in all 13 countries studied. They represent about 30% of teens worldwide, and their numbers are especially high in Western Europe.

The United States, on the other hand, lags slightly in its share of Creative teens (only 23%). They are outnumbered by Traditional teens (at 41% the largest segment in the States.)

Implications: Appealing to status or creating a superficial ‘badge brand’ won’t work with Creatives. They don’t want to fit into one neat little box – and they don’t want their brands to either. Instead, brands should appeal to their desire for authenticity. Help them answer the age-old questions: Who am I? What do I stand for? What do I believe in?

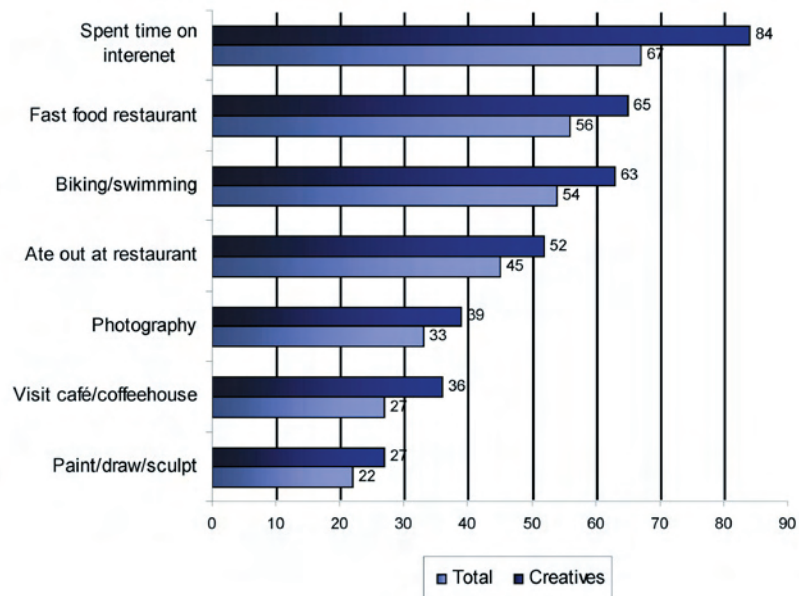
Most Important Values

Creatives:



Activities For Enjoyment

Creatives:



From Edgy to Traditional

Whatever happened to good old teenage rebellion? The USA, the global birthplace of that notion, has officially turned a conservative corner in its history.

USA teens appear to be more traditional than many of their global counterparts, including teenagers from the UK, Germany, France and even China.

In questions about their values and expectations in life, American teens overall emphasize morality and family. The majority list “living by high moral standards” as a top life expectation – 58% of USA teens versus 33% of teens globally. Forty-five percent believe it is best to remain a virgin as long as possible versus 22% globally.

Marriage and kids are among their top life expectations: 83% expect to get married (vs. 58% globally) and 74% expect to be a parent (vs. 52% globally).

American teens are more religious than teens in any of the other countries studied. They are much more likely to believe in God, more likely to consider themselves religious and more likely to have attended a religious service in the past 30 days than other teens around the world.

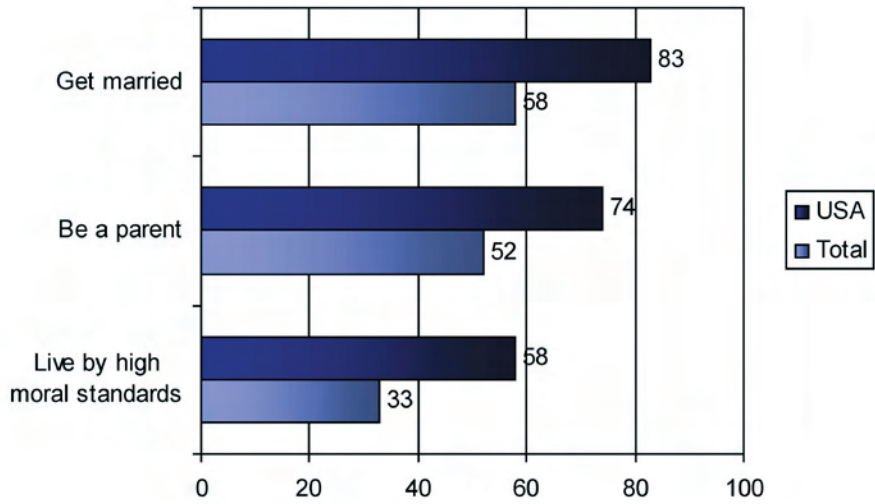
Not all USA teens fit this pattern, however. Instead, a Blue Teen/Red Teen phenomenon seems to be occurring, based on their personal values (not their state of residence). About half of USA teens qualify as Red Teens with strong conservative views, while the remaining half, Blue Teens, emphasize individuality and tend to reject tradition.

Brands today will need to consider this cultural dividing line as they're targeting teens in the United States.

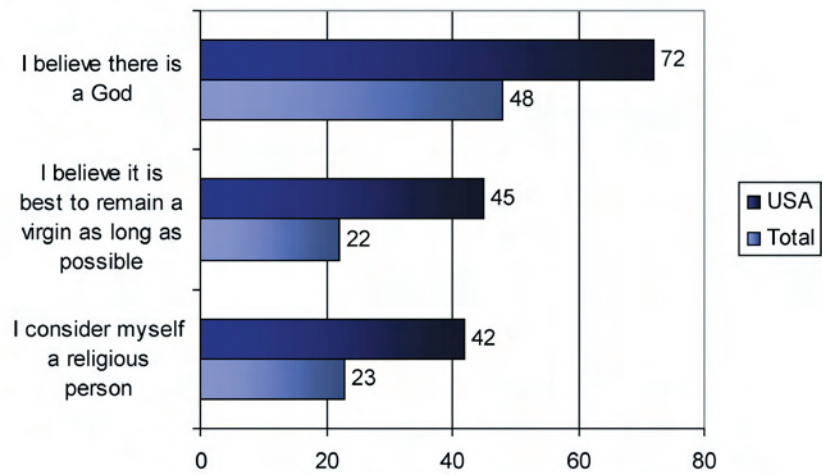
In fact, evidence suggests that brands are being forced to one side or the other in the culture wars. Based on positive brand ratings, USA Blue Teens tend to gravitate toward brands like Sony, Amazon, Apple, eBay. Red Teens stick to more wholesome, tried-and-true brands such as Gap, Kraft, Nestle and Disney.

Implications: Familiar teen themes of cynicism, irony and sexuality will fall flat with the large group of American Traditional teens. Don't run from tradition, duty or sincerity. Re-interpret them for a new generation, as American teens are doing themselves.

Life Expectations



Attitudes



From an Elite to a Mass Market

Technology isn't just for geeks or rich kids anymore. As access and technological proficiency increased over the past decade, the profile of the most wired teens has changed dramatically.

Worldwide, new technology-savvy, social-networking teens have emerged — the SuperConnectors. They are a large group of teens who wield a host of communication technologies to maintain their always-on social network and constant connection to information and culture.

SuperConnectors are defined by their regular use of technologies such as cell phones, text messaging, the Internet, email, instant messaging and search engines.

How do they differ from their peers? The SuperConnector is more likely to go online than to watch TV and more likely to use a search engine than to listen to a CD. They are as likely to be female as male and do not self-identify as geeks or techies.

They are active and engaged. Going shopping, eating at fast food restaurants, visiting cafés or coffee shops, playing sports, going to parties, bars, and nightclubs more often than their peers.

What's driving the shift? For SuperConnectors, it's no longer about technology with a capital T. Sending a text message is like passing a note in class. It's a way to stay connected.

So what does the emergence of SuperConnectors mean for brands? Word of mouth is still the number-one consumer influencer. Brands have a new opportunity to leverage these personal networks and talk to teens through the channels they use with each other every day.

In fact, with the right infrastructure, we could see a day in the future when a teen's favorite coffee shop could send a text message about cool events or Nike could IM him/her when a favorite color running shoe comes out.

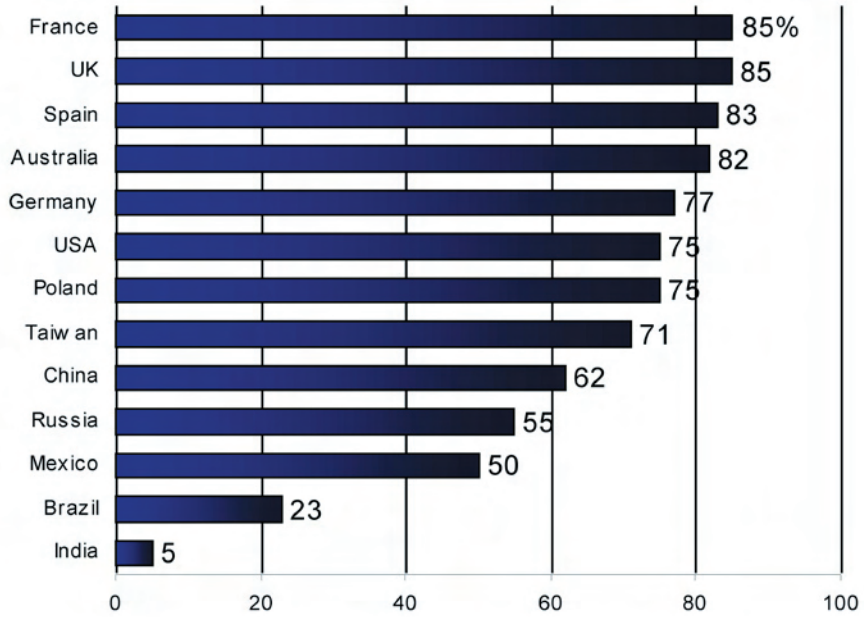
More than any generation, today's global teens have an adept command of how to leverage new technology to benefit their everyday lives. It is time for brands to follow suit.

Implications: If your brand wants a relationship with this generation, connect them to each other. For them, there are no "new media." Connecting virtually is how they live. The way marketers connect with them may be as important as the messages their brands convey.

of the Following EVERY DAY:

% Who Do 2+

Talk on cell phone, text message, go online, email, IM, use search engine:



From American to World Brands

A generation ago, Coca-Cola taught the world to sing. Today, USA brands no longer dominate the list of top 10 global teen brands.

While Coca-Cola, McDonald's and Disney can still boast worldwide brand awareness, GenWorld findings suggest that to a new generation of global teens, being well-known isn't enough to make a brand popular.

In fact, several American mega-brands appear to be slipping down the charts, with McDonald's and Disney leading the descent. McDonald's, while still #2 in recognition, has fallen off the charts in preference (a dismal showing at #32). While Disney's awareness is #9, positive ratings leave it at #23. Coca-Cola still ranks #1 in awareness; but its affinity ratings have slipped to #8.

Which brands are tops today? Sony, Nokia and Adidas rank highest in teen consumer preference. These three brands are all from different countries (Japan, Finland, Germany). Nike, at number-four, is the leading US global teen brand.

Is this a sign of America's slipping stature in the global markets? Findings are unclear. There seems to be a great ambivalence toward

America among global teens. About half admire America while half don't. Yet, it remains by a slim margin the country they would most like to visit.

This is more likely a sign of the increasingly global nature of teen consumer culture which, includes many global icons in music, fashion, movies and brands. As teen lives have become more of a multicultural melting pot, so have their brand choices.

Nonetheless, some American brands are thriving among global teens. These include several energized up-and-comers like Microsoft, Levi's, MTV, M&M's and Kellogg's. At the same time, several USA brands are better known than liked among global teens, including Panasonic and Motorola.

Implications: Awareness doesn't equal affinity for today's global teens. Plastering a brand logo everywhere doesn't guarantee a connection and in fact may have the opposite effect. Whispering, rather than shouting louder than the competition, may do more to earn this generation's respect.

Top Global Teen Brands:

Net-Positive Rating

Sony	72
Nokia	69
Adidas	65
Nike	64
Colgate	63
Nestlé	63
Cadbury	62
Coca-Cola	62
M&M's	62
Kodak	58

Top Global Teen Brands:

Brand Recognition

	Rank Based on Brand Name Recognition	Net Positive
1.	Coca-Cola	8
2.	McDonald's →	32
3.	Nokia	2
4.	Sony	1
5.	Colgate	5
6.	Nestlé	6
7.	Nike	4
8.	Disney →	23
9.	Kodak	10

of Status to Drivers of Apathy

Teen apathy has found a new and unexpected target — brands.

According to GenWorld findings, less than half of teens polled want to wear brand logos, less than a third feel you can tell a lot about someone by the brands they use, and the majority feel there is too much advertising in the world.

In fact, 62% of teens around the world register as “apathetic” toward brands. In countries such as Spain, the percentage of apathetic teens trends upwards of 80%.

Will teen brand apathy build into a full-scale brand backlash?

Most likely not. But what’s happening is perhaps even more dangerous for brands.

Even anti-brand sentiments can be leveraged to a company’s advantage. Look at Urban Outfitters or American Apparel, which have turned unbranded into a fashion

statement. Brand apathy, unfortunately, means teens just don’t care.

So, what’s the antidote? The mantra in the ’90s was stand out, stand apart, be different. Brands were just trying to break through the clutter. He who yelled loudest won. It was all about disruption and shock value.

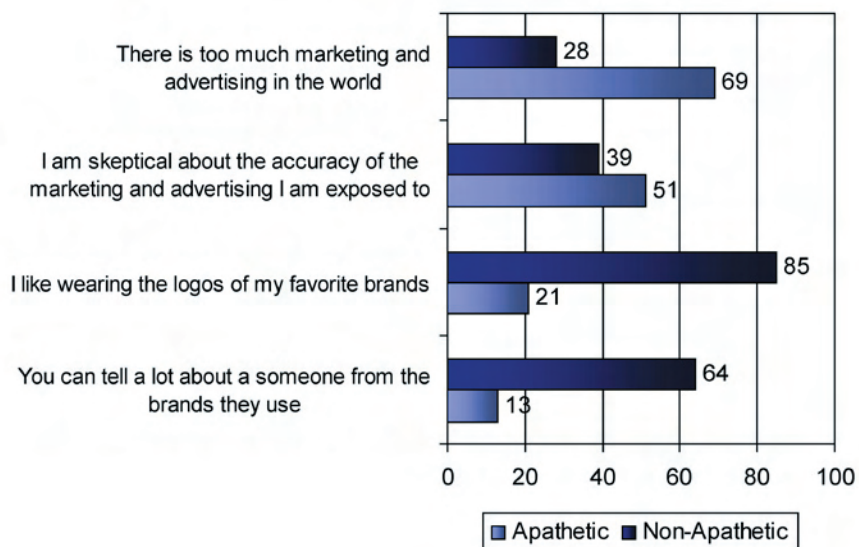
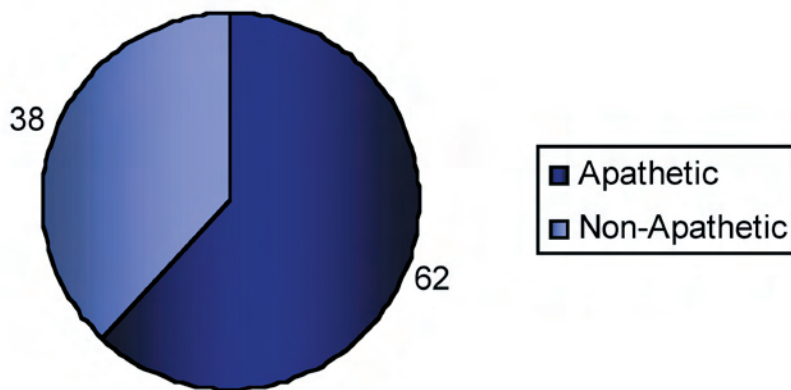
What’s missing today is meaning. Instead of just striving to stand out, brands must strive to stand for something important.

Doing so allows teens to adopt, explore and interpret a brand’s meaning as they create their own personal statements.

Implications: Give teens something to care about. Have a cause, a mission, a difference-making purpose in the world. Hype causes apathy, but meaning energizes. To stand out, be a brand that matters.

They Feel About Brands?

How Do



The GenWorld Teen Study, commissioned by Energy BBDO, gauged the lifestyle, values, attitudes and brand perceptions of 3,322 teens aged 13-18 in 13 countries around the world. Countries included: USA, Mexico, Brazil, U.K., France, Germany, Spain, Australia, Russia, Poland, China, Taiwan and India. The study was fielded over the summer of 2005 and administered in participants' indigenous language. An online methodology was used in developed countries where Internet access is widely available and an in-person methodology was used in developing countries. The sample was balanced male and female, with older and younger teens equally represented, and reflected broad socioeconomic status (A, B, C social classes.)