LS:N GLOBAL

THE : FUTURE : LABORATORY

Generations

Now and Next 2024–2025

Introduction

How can you capture the real differences defining and driving each generation? Why is it important now, more than ever, to step beyond the stereotypes towards a more impactful understanding of consumer behaviour?

These are the questions our clients and members ask us, especially when faced with growing debate about the ongoing validity of using generational demographics at a time of seemingly increased polarisation and a raging culture war. Identity boundaries are blurring, yet there seems to be more that divides us than unites us.

At The Future Laboratory, we take a two-pronged approach to helping our clients understand consumer behaviour. As generations entwine and age-dominated attitudes collapse and merge, we believe it's important to look at consumer groups united by attitude – as we do in the Communities analysis on LS:N Global, our trends, intelligence and insights platform.

But we also know that understanding generational demographics and the important factors defining each generation, from Boomers to Gen Alpha, is more essential than ever to ensure your business understands consumer evolution.

Our Generations: Now and Next 2024–2025 report takes an in-depth look at key generational demographics and their evolving attitudes to technology, work, finance, education, sustainability, and health and wellness over the next 3–5 years.

As the global population ages, the UN reports that people over 65 are the fastest-growing age group, with their numbers expected to surpass those aged 15–24 by 2050. So, in many ways, this is a report about ageing, no matter what the age group. It is a demand for an imminent re-assessment of what later life is and how it is referred to. This is also powering new perspectives, particularly around the adoption of Flat Age mindsets and a much-needed focus on a new set of life stage markers.

'I think in marketeers' heads, probably because they've seen so many pictures of it, they still see the smiling white-haired Boomers looking really healthy on bikes and stuff like that,' Georgina Lee of the UK's National Innovation Centre for Ageing told us. 'But that is not the reality. We need our citizen voices to drive businesses to innovate in a new way. Because we've got a 100-year life not a three-stage life any more.'

Dr Jean Twenge, professor of psychology at San Diego State University and author of Generations, explained to us the importance of understanding how technology is shaping a 'slow life' experience: 'Someone who's 25 and has a new-born has some similarities with someone who's 40 and has a new-born. What stage you are at is an important consideration. But age still matters, because with technology and its impact on the slow life strategy, being a certain age doesn't necessarily mean what it used to.'

With this in mind, how should you use this report? Aside from being an excellent reference for generational insight focused on North America, Europe and Australia – updated every 18 months – it is a tool for understanding new models of ageing. If you want all there is to know about Gen Z, we encourage you to look at underserved Gen Xers first. Want to get ahead on Alphas? Be sure to appeal to their gatekeeping Boomer grandpeers. Just don't ask us about Gen Beta (not yet, anyway) as they haven't been born and our business does not operate on wild speculation, but on a foresight model grounded in a well-established, industry-leading methodology.

We ask you to remember this; there is more that unites us than divides us, so when looking at generational difference, put it in context. It is with this strategy in mind that we can all make a better future happen.

As always, we encourage your feedback and would like to continue the conversation, so reach out to us via hello@lsnglobal.com or on any of our media channels.

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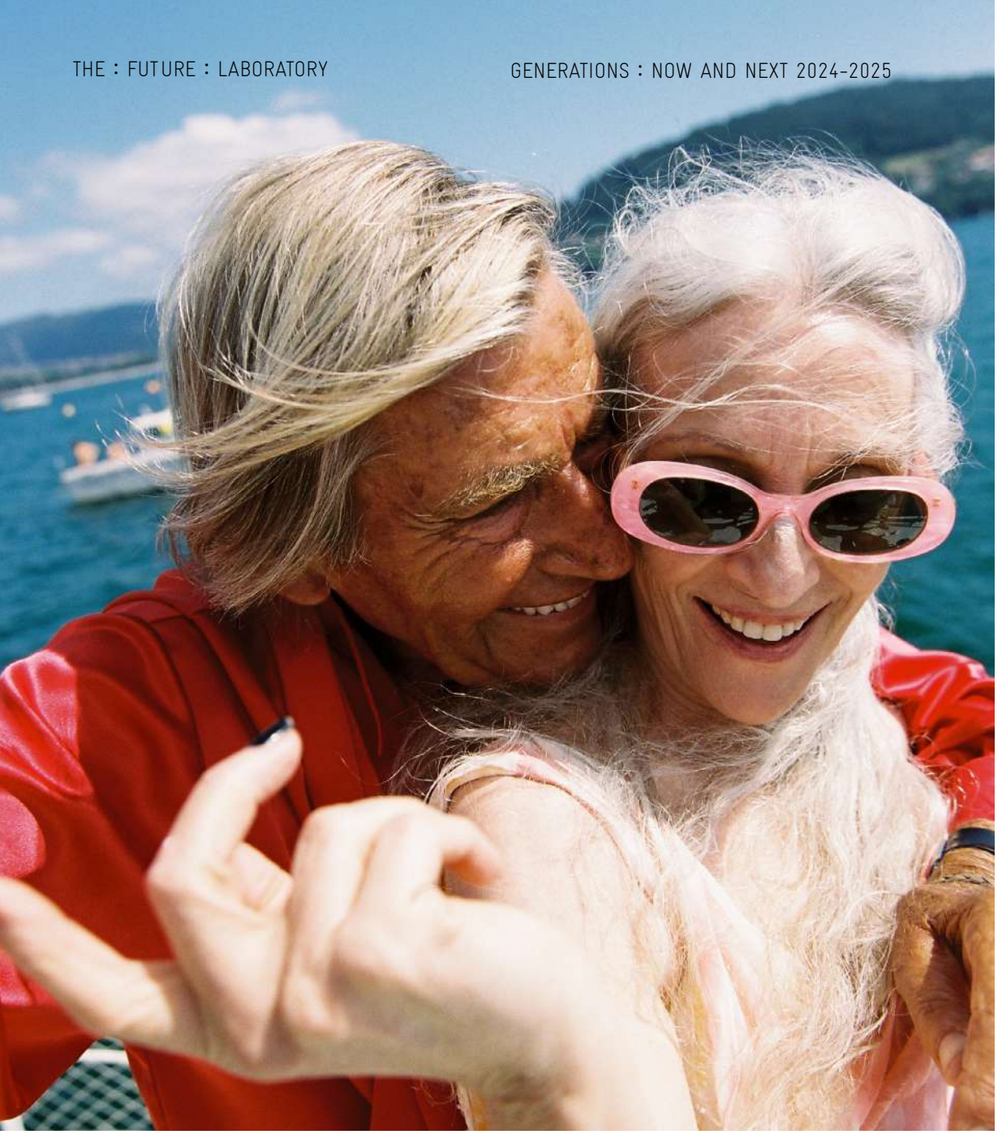
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‘We’ve got to *not* drift apart and *not* unthinkingly drift apart, but actually, thinkingly, *try* to bring each other together again. These things *can* change, *do* change, but you need some intervention’

Bobby Duffy, author, The Generation Divide



Celine Van Heel captures her grandfather, also known as The Spanish King, in his prime senior years, Spain

Born 1946–1964

Boomers Now and Next

From *Ageing* to *Becoming*

There is an upcoming milestone in the Boomers' generational journey. By 2030 they will all have reached the average Western retirement age of 65, supercharging a wider re-assessment of later life purpose along the way



Off The Grid by Gucci in collaboration with Highsnobiety, UK

At a glance

: The Baby Boomers were born from 1946 to 1964, a significant 18-year span with a current age range of 59–78

: With the possibility of becoming centenarians, they are rethinking their retirement era as a successful second act, rewriting the meaning of later-life living

: Although still powerful and with growing wealth, this generation has a wealth and health gap that continues to grow – with repercussions for wider society

: The legacy of this dynamic generation will not only influence their own ageing journey but also set precedents for future generations

The immutable characteristics of a generation – the ones Bobby Duffy defines as the Cohort Effects of being socialised in different conditions from other generations – have seen the Boomers experience many dynamic events that have shaped today's world. These range from the post-war aftermath to the civil rights movement ushering in increased opportunities, choices and autonomy to the hedonism and self-expression that characterised the 1960s.

'Population ageing is an irreversible global trend. In 2021, one in 10 people worldwide were aged 65 or above. In 2050, this age group is projected to account for one in six people globally'

World Social Report 2023, UN

These multi-faceted experiences yield a nuanced and diverse characterisation. But there are significant unifiers: they continue to exert an enduring influence on society, mainly through their accumulated wealth; all Baby Boomers are expected to reach the average Western retirement age of 65 by 2030, according to the US Census Bureau; and finally, technology is awakening in them the possibility of a 100-year lifespan.

But don't expect a post-retirement spiral into social and economic irrelevance, not from the Boomers.

Instead, expect the prospect of longer lifespans not only to influence their outlook but also to demand a significant re-adjustment from society. Add to that substantial wealth, with individual mean net worth ranging from £769,000 ($970,000, €900,560) to £951,235 ($1.2m, €1.1m), according to Fortune, earning them a label as the wealthiest generation on the planet (source: The New York Times).

There should be a note of caution, however: although the richest people in their 50s and 60s in the UK today are twice as wealthy as the richest in this age group were 16 years before, the poorest are almost a third poorer. The UK's **Centre for Ageing Better's** Boom and Bust? report reveals that one in five will be unable to meet their future financial needs in old age – with women being about 10% worse off than men.

Meanwhile, 17% of people from the global majority in their 50s and 60s are unable to meet their current financial needs, compared to 5% of people from white backgrounds. The younger Boomers, often referred to as Gen Jones, will need separate recognition or face a level of invisibility.

Yet this growing section of the global population will be directing their investments towards themselves with travel, wellness and social experiences high on the agenda. But they will also start to adopt a legacy mindset that reaches across the generational divides. Gen Z? Who? It's the Boomers who are the generation to watch.

Drivers

Techno-boomers, Bedrockers, Silver Sprinters – let's count the many ways in which Boomers are bucking the trends set by previous generations and approaching later life as a process of becoming rather than ageing



Demographic Flip

There is a demographic switch under way in 2024 as the number of people aged over 65 is set to outnumber those under 15.



Restoring Purpose

Boomers are searching for a renewed sense of purpose and meaning, driven by their constant need for self-actualisation, independence and challenge.



Boomer Burden

The potential of a more meaningful connection between the oldest and youngest ages can offer a much-needed bridge across the generational divide.



Record Wealth

Questions are arising about how Boomers will control the inevitable transfer of their increasing wealth to younger generations.

Demographic Flip

There is a demographic switch under way in 2024 as the number of people aged over 65 is set to outnumber those under 15, with the number of over-65s expected to double over the next three decades.

According to the World Health Organization, the 65+ age group will outnumber those under the age of 15 in the WHO European Region in 2024. This is backed by UK Census data revealing that there are now more people aged 65 and over in England and Wales than children aged under 15; the number of people aged over 65 has surged by 20% over the past decade to 11.1m (source: **Office for National Statistics**). This means that nearly one in five people are aged over 65.

The global picture is similar: the number of people aged 65+ is expected to double over the next three decades, reaching 1.6bn in 2050 (source: World Economic Forum). Asia is leading this trend, with Hong Kong, South Korea and Japan expected to have the highest share of people aged 65 and over by 2050.

At the same time as experiencing an imminent youthquake, as reported by The New York Times, by 2050 Africa alone is projected to have a population of 163m people aged over 60 (source: **Knight Frank**). But it is Europe and North America combined that have the highest share of older persons, according to the **UN's** World Social Report 2023.

Both power and challenge come with this flip: power in the fuelling of new approaches, attitudes and even solutions to ageing; challenge in ensuring the resources are there to meet the needs of this ageing population and fulfil their desires.

'Life expectancy has largely doubled in the developed world over the past 10 or 15 years,' Ken Stern, founder of US organisation The Longevity Project, told LS:N Global. 'But we've largely responded to that by shoving those extra years into so-called 'old age' because we haven't really changed our notion of what constitutes old age. So, the driving notion behind our work at the **Stanford Center** on longevity is that, in order to optimise life expectancy – and healthy life expectancy for all – we really have to re-invent the life course for the 100-year life.'

It is this imminent demand for a re-assessment of what later life is, and how it is referred to, that is also powering new perspectives, particularly around the adoption of Flat Age mindsets and a much-needed focus on what unites rather than what divides generations.

'We haven't really changed our notion of what constitutes old age'

Ken Stern, founder, The Longevity Project



The New Yorker's *The Race for Office* cover depicts some of the oldest presidential election candidates in US history. Artwork by Barry Blitt, US

What are Drivers?

Drivers are fundamental shifts and external forces that have the potential to reshape the future trajectory of a brand or business, also sometimes referred to as mega-trends or global forces of change. They differ from trends in that they are long-term structural forces that are pervasive, powerful and transformative



‘It’s your life purpose that is pivotable. We all need to be thinking that at **80 or 90**, is there an opportunity to rethink our purpose?’

Georgina Lee, founder of The Commonland and consultant, National Innovation Centre for Ageing UK (NICA)

Restoring Purpose

Boomers are searching for a renewed sense of purpose and meaning, driven by their constant need for self-actualisation, independence and challenge.

They are feeling more psychologically equipped, emotionally motivated and inspired to live for longer. In many ways, this is due to the promise of improved healthcare, as LS:N Global explores in our Longevity Lifestyles macrotrend. But there is also a renewed search for purpose having squared up to Covid-19, derogatorily labelled by the media as the ‘Boomer remover’.

It’s a sense of purpose rooted in the search for self-actualisation that has long defined this generation. ‘Their ideal of ageing tends to be one of youthfulness and vitality: valuing not only activity but also realisation of the self, not only health but also fitness, and not resignation but agency and handling new challenges,’ says The Baby-boomer Generation report (2021).

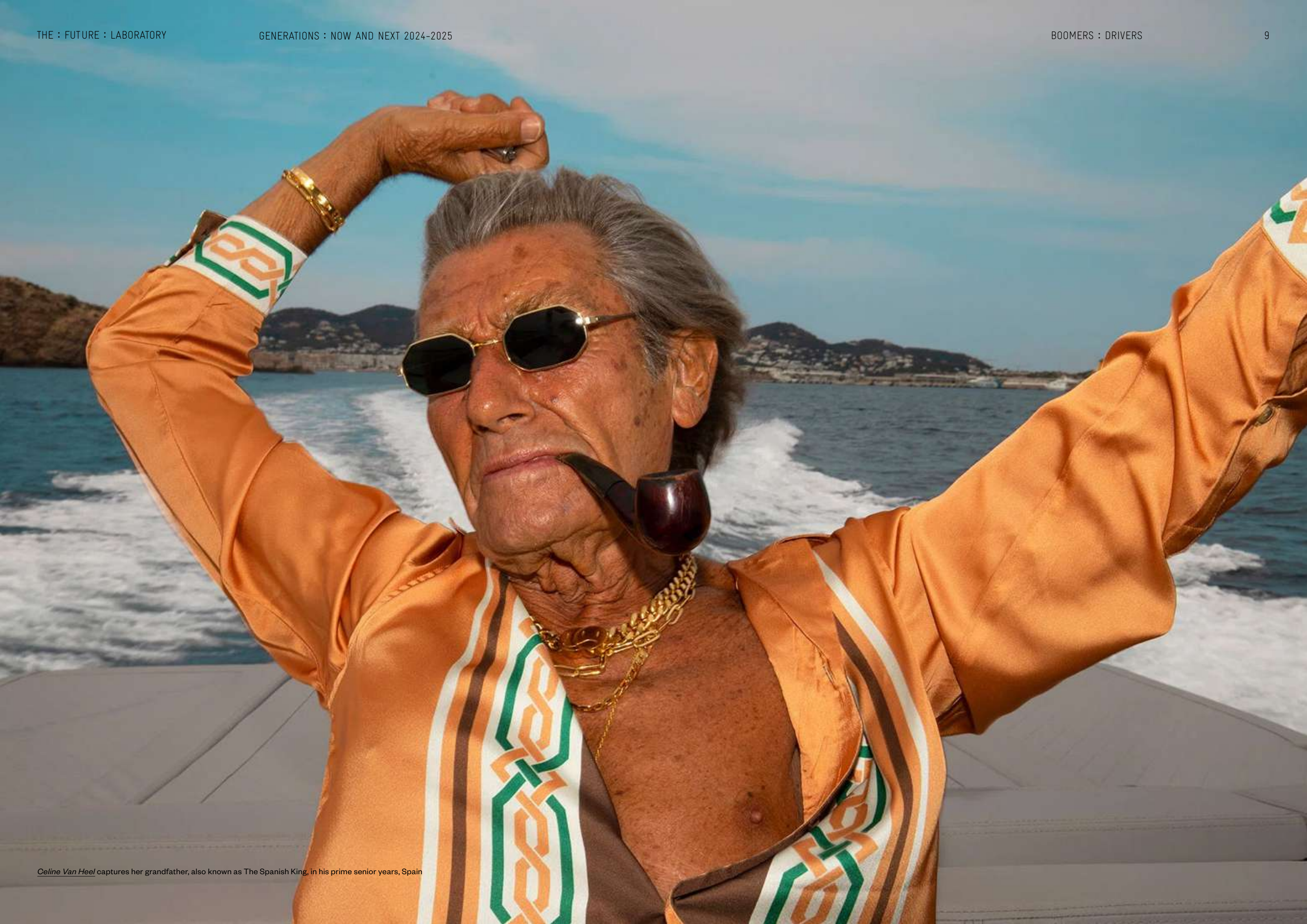
Purpose could also be a valuable unifier across generations. The XYZ@Work Post-Pandemic Workplace Study revealed a significant trend, with 45% of employees across generations feeling a strong need to re-align their careers to a greater sense of purpose and meaning, especially at work.

‘We still view learning to be something we do in our youth,’ says Ken Stern. ‘That formal education is something that occurs between three and 21, or from 18 to 24, and after that it’s sort of episodic and self-driven. I think we’re beginning to see just the start of trends that suggest social norms will change so that the idea of life-long learning is normal, as opposed to your early-life learning.’

The shift may have already started; after **Purdue University** in the US bought education provider **Kaplan**, it launched a Lifelong Learning programme as part of Purdue For Life, specifically to offer off-campus learning opportunities across lifespans.



Left to right: The Golden Bachelor is a spin-off series featuring a cast of senior citizens, US; Faces of Travel by Delta Air Lines and Adobe, US



Celine Van Heel captures her grandfather, also known as The Spanish King, in his prime senior years, Spain



Left to right: The Aged Agitators are Extinction Rebellion environmentalists aged between 60 and 80, based in Bristol, UK; OK Boomer merchandise by Shannon O'Connor, US

‘You are failing us. But the young people are starting to understand your betrayal. The eyes of all future generations are upon you. And if you choose to fail us, I say: We will never forgive you’

Greta Thunberg, in a speech to the UN, September 2019

Boomer Burden

The potential of a more meaningful connection between the oldest and youngest ages can offer a much-needed bridge across the generational divide.

It is through the eyes of other generations that the Boomers have been subject to the most – often negative – assumptions. Whether correct or not, media-boosted stereotypical views are shaping a re-assessment of their purpose and fresh appraisals of Boomer values. After all, who wants to be viewed as a burden or as someone to blame?

While the majority of Boomers appear satisfied with their own lives, as indicated by the **Ipsos** Generations 2023 report, which reveals that 63% of US Baby Boomers believe they had a better life than their parents, not all generations view them and their life decisions favourably.

Gen Z are significantly negative about Baby Boomers (62% negative) and have no positive opinion about them whatsoever (source: April 2023 Report, People's Panel). At worst, Boomers are deemed reckless and selfish due to their contribution to consumerism and the impact that has had on the planet. They have also gained a negative reputation for lack of action on climate change.

Greta Thunberg's burning speech to the **UN** in September 2019 boldly posited the view that older generations have betrayed young people. It is an opinion far removed from that original view of Boomers as the counter-culture 68ers – the pioneers, mavericks, challengers, progressives and social advocators of tolerance and liberal values – whose failure in the present to think beyond their beloved multilateralism is proving to be a climate-saving blocker.

But as new research unfolds, they are shown to be very conscious about the planet's health. 'The groups were also asked how concerned they were about specific environmental issues, such as pollution. In that regard, Baby Boomers were the most concerned generation at 84%,' reveals a Fast Company-Harris Poll report. Whether concern translates into meaningful action is as yet unknown.

But note the pressure to tax the rich more from public figures such as 31-year-old Austrian heiress Marlene Engelhorn, who in January 2024 launched **The Good Council for Redistribution** initiative, or Gute Rat für Rückverteilung, involving 50 randomly chosen people in Austria deciding how best to spend the £21.3m ($27m, €25m) she inherited from her grandmother (source: The Guardian).

But as we explore in Grandpeers Market, Boomers are also increasing their digital adoption and campaigning alongside younger generations. 'Their ongoing participation in social, civic and possibly political activities will likely remain strong, reflecting their historical propensity for activism and engagement,' Stephan Chung, health sciences professor at California State University, told LS:N Global.

Keeping in mind the Generational Flip outlined previously, the stage is set for a potential and much-needed reduction in the generation gap – a chasm fuelled by the media-fanned flames of the so-called culture wars.



If Americans aged **50+** were their own country, they'd be the third-largest economy in the world

Source: Warc, AARP Longevity Economy Outlook report



The Rochambeau Club, France

Record Wealth

Boomers are continuing to increase their collective wealth. As key life stages are delayed – expanding to fit our longer lives – questions are arising about how they will seek to influence or control the inevitable transfer of this wealth to younger generations.

Wealth is power, and with power comes influence. Having already benefitted from a £102 trillion ($129 trillion, €119.6 trillion) 'massive wealth transfer from the government over the past 40 years', according to a **Bank of America Global Research** note, their wealth is still increasing (source: Fortune).

According to **The Washington Post** (via Yahoo), Baby Boomers controlled more than 20% of the national wealth in the US when they were in their early 30s, but similarly aged Millennials held only 3.5%. The Centre for Ageing Better states that in the UK 'the richest people in their 50s and 60s today are twice as wealthy as the richest in this age group were 16 years before' (source: Boom and Bust?).

With no significant decrease in wealth on the horizon, Boomer spending power will be maintained. Consumers aged 50+ contribute £6.5 trillion ($8.3 trillion, €7.7 trillion) each year in economic activity to the US economy (source: AARP Longevity Economy Outlook Report).

Over-65s' global spending power is expected to reach £11 trillion ($14 trillion, €13 trillion) in 2030, up from £6.6 trillion ($8.4 trillion, €7.8 trillion) in 2020 (source: World Data Lab). Hence, the October 2023 trade recommendation from **Bank of America Corp**, and labelled by Fortune as 'Buy Boomers, Sell Millennials', perfectly captures the widening generational wealth gap.

But there is a tension arising. The Future Laboratory's Great Wealth Transfer report explores how Millennials and Gen X currently possess a meagre 3% of all wealth assets, but this is about to reach a significant 60% globally. Why? At some point the Boomers' collective wealth will have to be handed down; in the US alone that's a staggering £42 trillion ($53 trillion, €49 trillion) by 2045 (source: **Cerulli Associates**).

How Boomers will seek to influence and maintain power over this transfer is yet to be seen. 'The stereotype is that all Boomers are rich and powerful, but there's a huge segment who are not,' Dr Jean Twenge, professor of psychology at San Diego State University and author of Generations, told LS:N Global.

'On the one hand, they are holding on to power longer than any other generation ever has. Yet, there are still a lot who have been left out,' Jean Twenge says, highlighting endemic drug addiction issues and high suicide rates among men. 'What's going to happen to those who didn't save enough and who have major mental and physical health issues, especially in countries like the US where there is not universal healthcare? It may very well get worse.'

Insight

We assess the significant insights across each generation in relation to Success and Achievement, Technology, Health and Wellness, and Community and Identity



Success and Achievement

Preserving and protecting their wealth is paramount to Boomers, paving the way for new tools for managing and safeguarding finances.



Technology

Boomers' increasing tech-savviness offers the potential for more cross-generational connection and shared cultural experiences.



Health and Wellness

Not content with continuing to flex their financial and digital muscles, Boomers are bench pressing with their physical endurance too.



Community and Identity

Already opening up to new relationships, situationships and explorationships, there is growing recognition from brands that desire never retires.

SUCCESS AND ACHIEVEMENT

Finance: Long-gamers

Preserving and protecting their wealth is paramount to Boomers, paving the way for more focused spending on certain categories, and new tools for managing and safeguarding finances.

Although Boomers are generally noted as being pragmatic, rational and conservative with their finances, changes are afoot in their spending patterns. Services are emerging that help this financially savvy generation to better manage and preserve their wealth, which is a top financial priority for 55% of US Boomers (source: Ameriprise Financial 2023 Research.)

A majority (60%) have made noticeable changes in their spending habits, according to **Statista's** Consumer Trends 2024 report, as they adopt more frugal choices and prioritise value for money. But it is still in practical investing, including in real estate, that Boomers find their security. In the UK, Baby Boomers now own more than three quarters of the nation's property (source: Savills via The Standard).

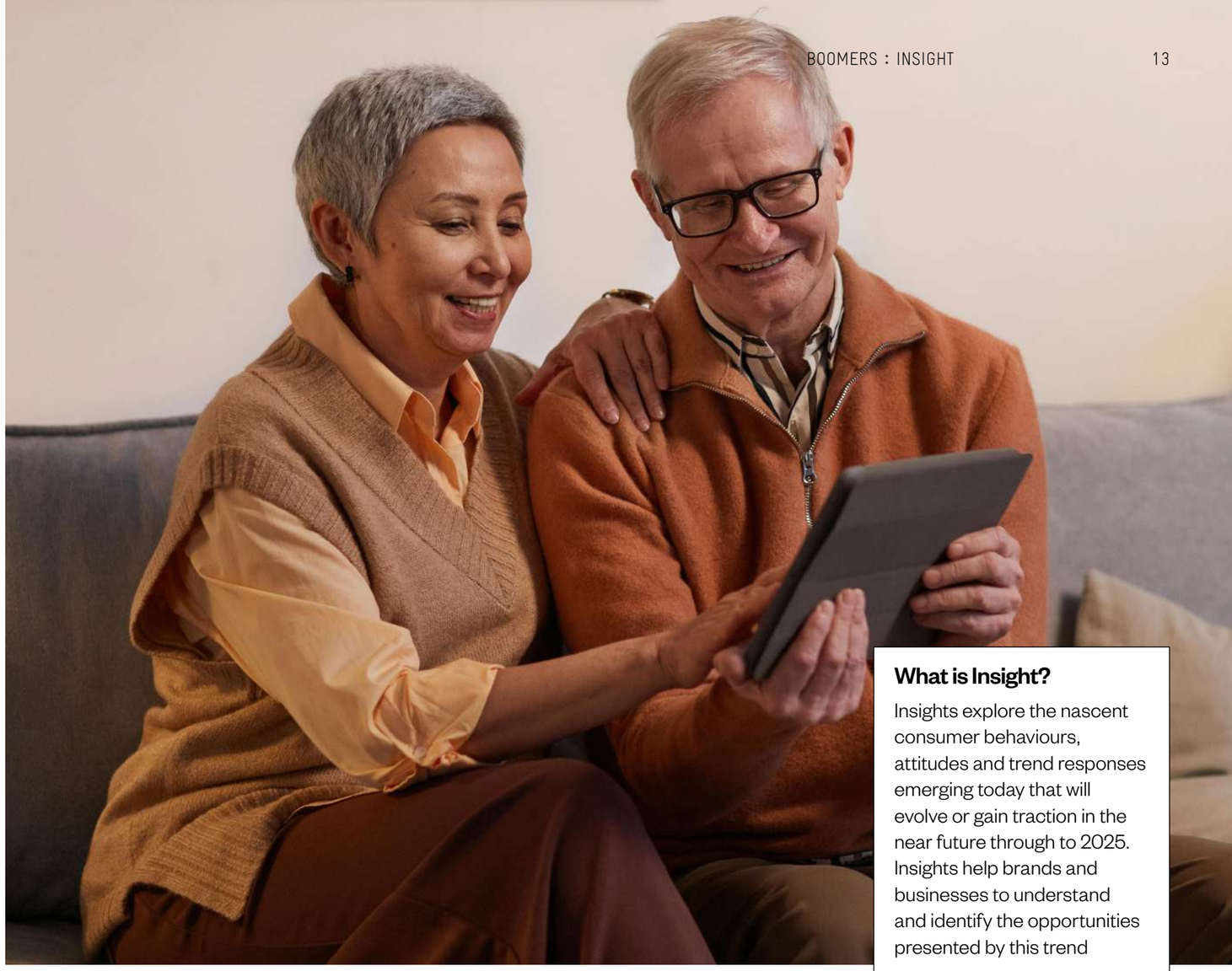
Of significant focus is preserving wealth in order to support retirement. According to The Future Laboratory's The Great Wealth Transfer report, this is achieved through investments: 'Boomers – the progenitors of what we know today as lifestyle products – tend to overly invest their wealth in stocks.'

As a result, they spend less of their income on housing than their younger counterparts. Instead, according to **Bank of America**, a bigger share of Boomers' spending goes on healthcare, home improvements and entertainment than that of other generations. Travel is the top priority for discretionary spending for people aged 50+, with the bank noting that travel businesses and those offering older people care services could benefit from Boomer spending.

Increased investments are being directed towards supporting and safeguarding the substantial wealth of this generation. This ensures their ability to financially support their extended senior years, especially as they live longer and aspire to pursue their passions.

A 2022 Investopedia Financial Literacy survey in the US revealed that the number one relevant skill Boomers would like to acquire is how to keep their financial information safe online today. According to **AARP** research, 56% of adults aged 50 and older made financial transactions on their smartphones in 2022. In 2019, pre-pandemic, only 37% said the same thing (source: AARP via Gonzobanker).

'We know that they have money in houses,' Georgina Lee, founder of UK agency **Commonland** and consultant for the **National Innovation Centre for Ageing**, tells LS:N Global – keen to highlight the Boomer wealth gap. 'But there is a significant portion of Boomers who are living in squalid rented accommodation. Not every Boomer has money, and I think we always have to put caveats on labels because we live in such a divisive society.'



Photography by Marcus Aurelius

What is Insight?

Insights explore the nascent consumer behaviours, attitudes and trend responses emerging today that will evolve or gain traction in the near future through to 2025. Insights help brands and businesses to understand and identify the opportunities presented by this trend

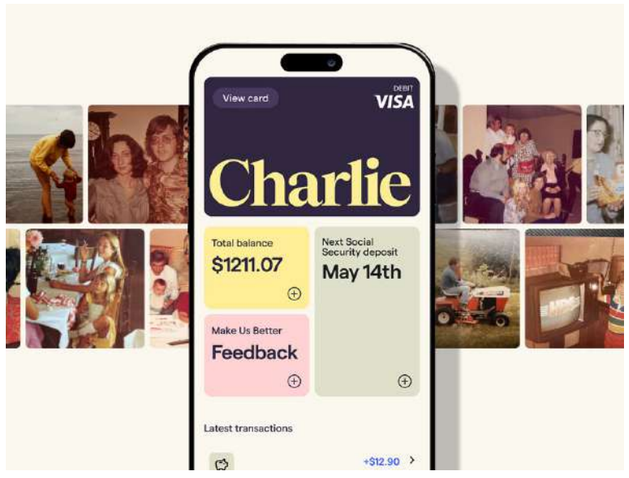
'A growing number of people in this population are either becoming, or will soon become, tech-comfortable enough to want a solution that comes to them, that meets their needs, and is available to them 24/7'

Kevin Nazemi, co-founder and CEO, Charlie (source: Banking Dive)

Case Studies

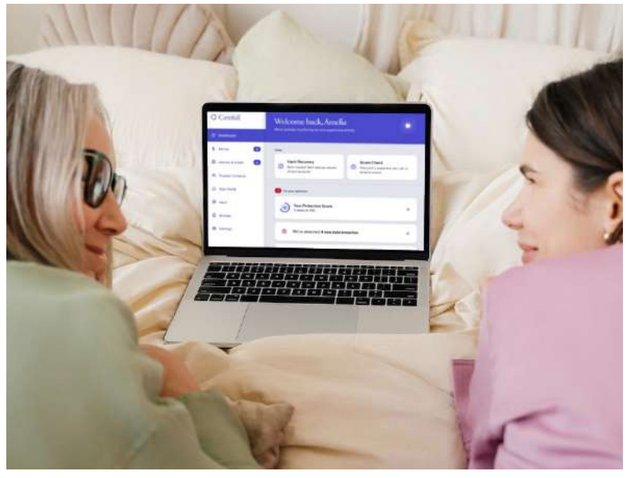
Charlie

Launched in May 2023 with £5.9m ($7.5m, €6.9m) in funding, Charlie is aimed at those aged 62 and over. With its intuitive interface, it is designed to activate access to about 10% of a user's accumulated assets and help those entering retirement adjust to 'deaccumulation' mode. Charlie will let customers withdraw their Social Security benefit up to four weeks early and there are no monthly fees.



Carefull

Receiving significant funding in 2023, Carefull is designed to help banks protect older customers from fraud, scams and 'money mistakes'. Noting a plethora of solutions aimed at Millennials and Gen Z, co-founder Todd Rovak told TechCrunch: 'Banks and wealth managers seemed desperate for technology to better protect and connect with their older families.'



Fintech4Longevity Academy (F4L)

A US-based e-learning platform, F4L Academy offers educational services relating to the changing needs of individuals in the age of longevity. Aimed at corporate professionals and researchers, it is a timely resource for understanding changing financial needs across all generations.



Left to right: Charlie, US; Carefull, US; Photography by Feuxels

Technology



PicPay, brand imagery by *Maltchique*, Brazil

Digital Habits: Techno-boomers

Boomers' increasing tech-savviness offers the potential for more cross-generational connection and shared cultural experiences.

As the digitisation of the Baby Boomer generation continues, they are spending more time online than ever and are also keener to try new technologies, with implications not only for marketing strategies and digital commerce, but also for intergenerational connection.

Baby Boomers in the US spend two more hours online per day than their Gen Z counterparts, and 108 minutes daily on social media platforms such as **Facebook** and **Instagram** (source: Colorado State University via Marigold Engage by Sailthru).

Most significantly, Baby Boomers have the highest awareness and exploration of generative AI tools (53.5%), followed by Gen X with 51.7% (source: Capgemini Research Institute).

The obsession with connecting with younger consumers is not matched with marketing initiatives for Boomers. According to Insider Intelligence, in the US in 2024, 11.3m consumers aged 55–64 and 10.8m consumers age 65+ will make a purchase via social media.

As Boomers move into the same digital spaces as younger generations, there is an opportunity to share the space and engage with similar content in comparable ways. There will be 36.4m Baby Boomers (or 53.8%) using social media networks in the US in 2024, according to Insider Intelligence's May 2023 forecast. Facebook is the most popular social media app used by Boomers, but **TikTok**, **Snapchat**, **Reddit** and **Instagram** are also growing in popularity.

A question arises, however, over whether younger generations will form an exodus from those digital spaces increasingly accessed by Boomers; on the one hand, we see the emergence of cross-generational interests, expressions and lifestyle preferences; while on the other, **Facebook** usage by those aged 55+ is at 12.9%, which is not insignificant considering the largest global user base on Facebook in January 2023 was 17.6%, comprising men aged 25–34 (source: Statista).

For now, a reach across the digital culture gap is evident – look no further than the fashion industry. From ubiquitous **Crocs** emerging as a cross-generational favourite to exclusive Spanish brand **Loewe**, whose spring/summer 2024 collection featuring British actress Dame Maggie Smith is 'evidence of how an icon in her 80s can influence women in their 20s' (sources: Fast Co, The Drum).

Half of grandparents in the UK would watch TikTok if it was available on their tv

Source: TalkTalk

Case Studies

Consumer Cellular

The US network's Iris Flip 'dumbphone' is targeting cross-generational needs despite most of its subscribers being aged 50 and over. It aims to meet two needs: greater connectivity for older users, and simpler, more controllable connection for younger users who want a level of disconnection. 'We're offering it as a counterpoint,' Craig Lister, Consumer Cellular's chief marketing officer, told Fast Co. 'Maybe part of the market isn't interested in the next latest and greatest smartphone.'



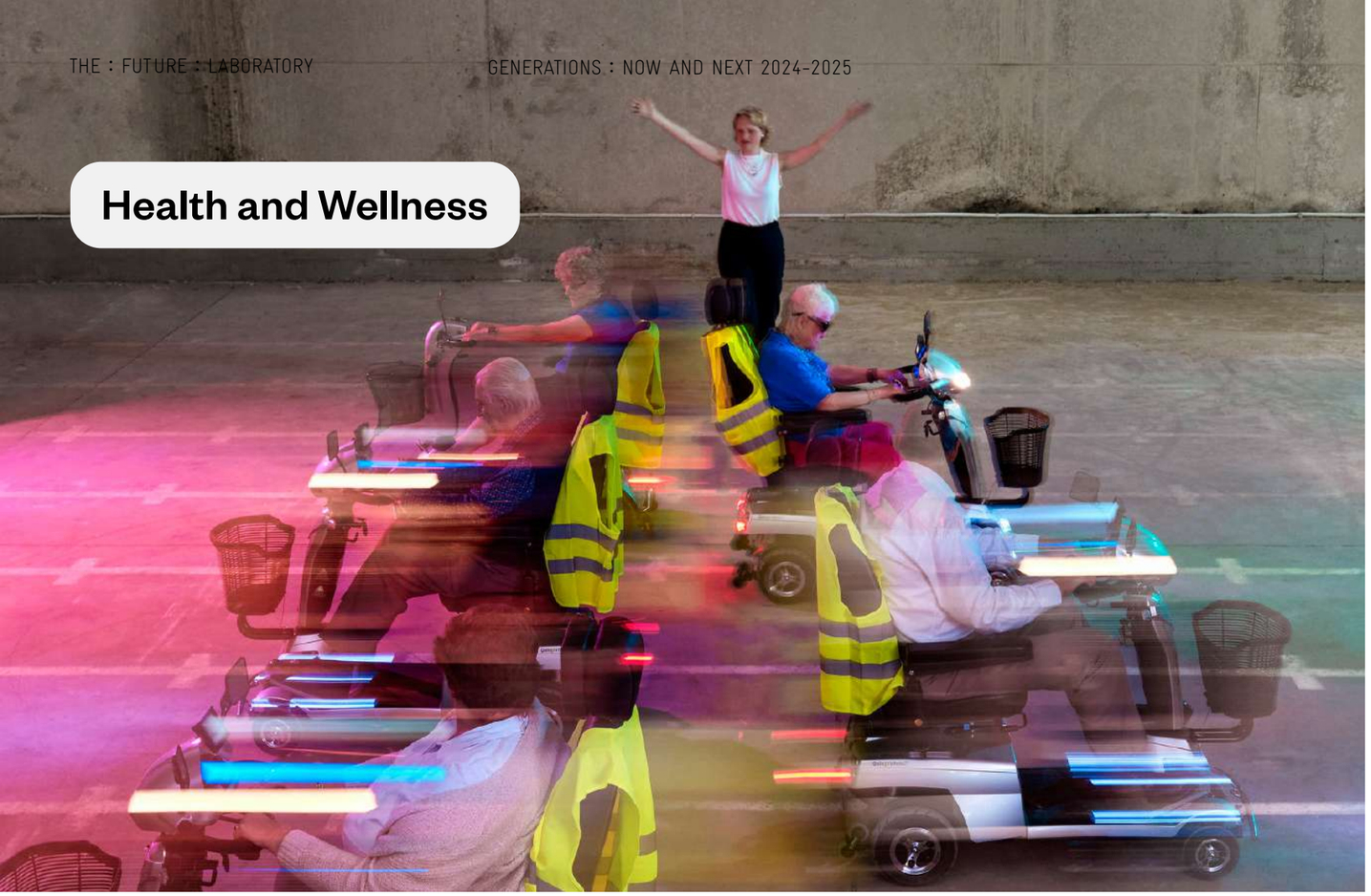
Grandpa Core

From @gramparents on Instagram tracking stylish older citizens and the shift from 'coastal grandma' style to the rise of 'grandpa core', fashion is embracing senior chic. That's according to Pinterest's Predicts 2024 report, which notes an uplift in searches for 'grandpa style' (+60%), and 'retro streetwear' (+55%) in 2023: 'In 2024, Gen Z and Boomers will embrace 'grandpa core' and bring eccentric and expressive elements for the ages to their wardrobes.'



Left to right: Freedom Calls campaign by *Alto* for Consumer Cellular, US; Go for a Lacoste Polo campaign by BETC for Lacoste, US

Health and Wellness



Left to right: Het Scootmobiel Dans Collectief by *Femke Hoppenbrouwers*. Photography by *Femke Reijerman*, The Netherlands; National Senior Games by Humana. Photography by *Tim Tadder*, US

‘Baby Boomers place a high value on health and wellbeing, embracing activities like strength training and cycling’

Professor Stephan Chung, College of Health and Human Development, California State University



Fitness: Silver Sprinters

Generally healthier than people of the same age in preceding generations, Boomers are keen to run further with this generational advantage. Overall, people in their 50s and 60s today have healthier habits than people of the same age in 2002, according to the Boom and Bust? report by the **Centre for Ageing Better**.

‘They are less likely to smoke (15% compared to 22%) or drink alcohol daily (16% versus 29%) and have better cognitive function (77% compared to 61%),’ according to the report. They are also participators, with 67% of people in their 50s and 60s being members of an organisation, club or society, including those that involve physical activity.

With one of the American College of Sports Medicine’s trends to watch for 2024 including ‘fitness programmes for older adults’, the adoption of more dynamic fitness choices such as strength training and cycling is under way. According to **MindBody** and **Classpass’s** 2024 Predictions Report, more than half of Baby Boomers say they prioritise wellness now more than ever, and over a third see strength training as more important than other wellness activities.

And there’s proof, literally, in the muscle power; even people in their 80s and 90s who haven’t weight-trained before can show significant gains after starting a supervised programme of lifting weights three times a week (source: The Washington Post). The industry is increasingly recognising these Silver Sprinters with brands like **Pure Gym** in the UK launching a fitness championship dedicated to the over-50s with a strong emphasis on athletic performance (source: Health Club Management).

‘Baby Boomers place a high value on health and wellbeing, embracing activities like strength training and cycling,’ Stephan Chung, health sciences professor at California State University, tells LS:N Global. ‘Their approach to health is proactive, with a focus on maintaining physical fitness and mental acuity to prevent age-related decline.’

Actively chasing longevity, Boomers are far from slamming on the brakes; in 2023, they were twice as likely to upload rides than runs to **Strava**, whereas Gen Z users were the opposite (source: Strava via Cycling Weekly).

Case Studies

Mooncool

In November 2023 this US-based e-bike manufacturer expanded its efforts to improve accessibility for older adult riders with the launch of its TK1 Folding Electric Trike. The three-wheeled bike is designed to be more stable to support balancing abilities, which decline with age. For simple mounting and dismounting, the trike has a low step-through design so there's no need to swing a leg over a high top bar, simplifying the process of getting on and off the trike.



LudoFit

Created by US-based Ludica Health, which specialises in exercise platforms for care centres, LudoFit is its first direct-to-consumer (DTC) platform in the form of an immersive fitness game for seniors. After each game, which can involve the player's avatar cycling, rock climbing or skiing in immersive, real-world locations, they can record how physically challenging the experience was with answers determining the challenge level of subsequent games.



Left to right: Mooncool, US; Photography by Mikhail Nilov, US



Dajlien collection by Ikea, The Netherlands

Leisure: Golden Gap-ers and Well-cationers

Wellness-related travel and leisure activities are becoming a prominent expenditure among older individuals, ranking high among their top spending priorities.

In 2023, travel was highest on the list of priorities for discretionary spending among American adults aged over 50, according to AARP data, which also showed that holidaying with family remains a key priority for this group. Yet the majority (63%) still embrace the idea of taking a 'bucket list trip' — for many (39%) even more so than before the pandemic.

Over one third (37%) of Baby Boomers surveyed for a **Norwegian Cruise Line** (**NCL**) report also admit they have a new lease of life when it comes to travelling and nearly 40% are planning 'the trip of a lifetime'. As we predicted in our Boomers Travel Market analysis, this bucket list trip is also expanding into a golden gap year opportunity for some; one fifth (20%) are planning to throw caution to the wind and go away for a year, while nine months is the ideal trip length for Boomers.

AARP data offers a note of caution for the coming years, however, revealing that the most common reasons keeping US travellers aged 50+ from booking their dream holiday are the increase in travel costs (21%), health issues (16%) and less available discretionary income (12%).

But it is their wellbeing and a need for recuperation that will drive Boomers to travel more over the coming years. The Hilton Trends Report 2024 reveals that, regardless of generation, the number one reason people want to travel in 2024 is to rest and recharge, although more Boomers said this (67%) than Gen Z (55%). Baby Boomer travellers are also more likely to look for trusted hotel brands with quality mattresses to achieve a good night's sleep (almost one in four). According to the report: 'While many Baby Boomers recognise the benefit of technology, they really appreciate the 'human' factor of hospitality. They are more than twice as likely to say the 'human' factor of hospitality makes the travel experience rather than that technology helps reduce travel stress. Service is paramount.'

Baby Boomers are **more than twice** as likely to say the 'human' factor of hospitality makes the travel experience. Service is paramount

Source: Hilton Trends Report 2024

Case Studies

Geluxe Collection

UK-based G Adventures has launched Geluxe Collection, a line of travel experiences designed to cater for the evolving needs of its older customers, who account for 35% of its clientele. Originally known for its active, community-focused trips connecting young travellers with diverse cultures, G Adventures has adapted its offer after recognising that ageing travellers are more active and demanding more than conventional, leisurely luxury tours. Crucially, there are no age restrictions – the trips are open to everyone.



LifePlan Resorts

Billing itself as the first luxury senior community in Europe, LifePlan Resorts has opened its first destination an hour from Lisbon, Portugal – a country named Europe's best for retirement (source: CNBC). A high-end retirement community, it offers an active Healthy Ageing programme as part of what it calls 'the most comprehensive retirement plan in the world', offering accommodation, hospitality, fitness, wellness and ongoing healthcare on a 36-hole golf estate situated in the Tejo River Nature Reserve in Benavente.



Left to right: Geluxe Collection by G Adventures, UK; Life Plan Resorts, Portugal

Community and Identity

Relationships: Boomer Bedrockers

Boomers have been opening up to new relationships, situationships and explorationships since the rise of grey divorce rates, but now there is growing recognition from brands and businesses that desire never retires.

With an estimated 14% of single people aged between 57 and 85 in the US in a 'dating relationship', according to The New York Times, and more than one-third of Boomers in the US unmarried, according to US Census data, there is a later-life search for new relationship avenues. With that comes a surging interest in sexual wellness as Boomers bring intimacy to the fore.

Boomers are also in exploration mode. Feeld, an app for sexual exploration aimed at singles and couples, revealed that the number of Boomers looking for threesomes increased by 520% on the app in 2023 (source: Mashable).

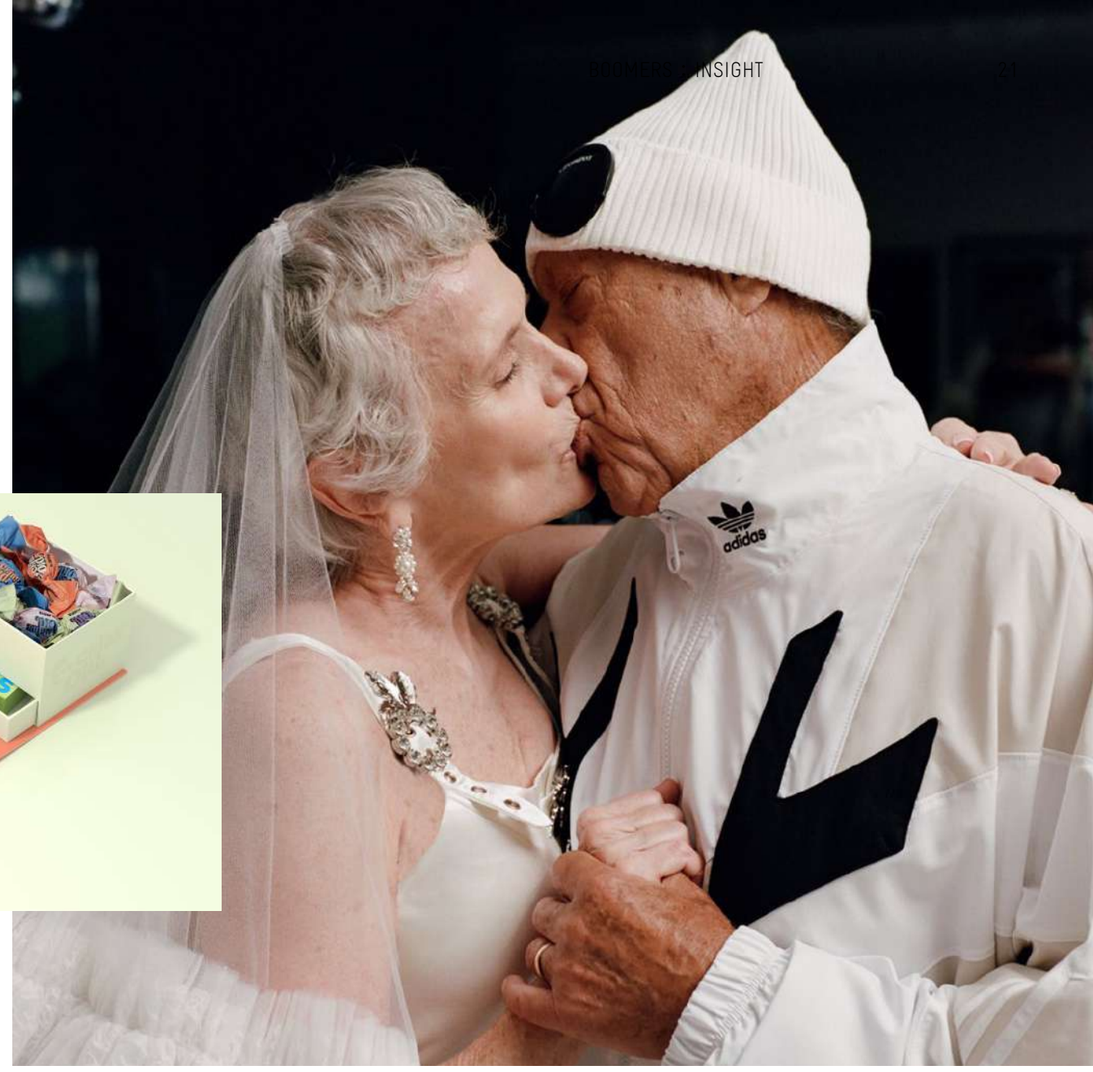
In the US, e-tailer **Wish** expanded its range of sexual wellness products in September 2023 in recognition of an Opinium study revealing that a large proportion of sexually active adults are already using sexual wellness products (77%), with 68% expressing a desire to try new sexual wellness products in the coming year. Among the Boomers in the study, almost three in 10 (28%) said they use vitamins or supplements to enhance their sexual wellness – the second-most popular product for this generation.

As Boomers seek to boost their sexual longevity, they are succeeding in the pleasure stakes. An August 2023 study from UK sexual wellness company Vella **Bioscience** revealed that although Gen Z respondents have the longest-lasting orgasms (14.04 seconds on average), Boomers are outperforming Millennials in this area with orgasms lasting longer (11.89 seconds versus 11.04 seconds). Campaigns manager for e-tailer **Escentual.com**, commenting on the study, told Wellbeing magazine: 'Previously it was thought women reached their sexual peak in their mid- to late 30s, but Vella Bioscience's research showed that the greatest quantity and quality of orgasms for women were over 10 years older. Clearly, attitudes towards sex for more mature women are changing and they are more likely to want to have fulfilling sex lives well past the menopause.'

But these sex-positive Boomer exploits come with a rising rate of sexually transmitted infections (STIs) in their demographic. In the past decade, STI rates for Canadian seniors over 65 have risen by 267% for chlamydia, 340% for syphilis and 388% for gonorrhoea (source: Jems press release). This prompted Canadian condom brand **Jems** to launch a 2023 safe sex campaign entitled F#cking Old, encouraging younger family members to speak to older ones about safe sex. In a further reach across the generational divide, it has also partnered with Jane Johanson, daughter of sex expert and Canadian television personality Sue Johanson, former host of the Sunday Night Sex Show.

'Talking about sex with your parents or grandparents may be awkward, but frankly, has never been more necessary,' said Johanson in a press release. 'This campaign is about harnessing the power of Gen Z who talk about sex easily, and often over their vast social media networks, to bring that conversation to the older generation who often don't understand their risks.'





Left to right: F*cking Old campaign by Dentsu Creative for Jems Condoms, Canada; Ssense Bridal Capsule Collection, Canada

'Over-65s are hugely under-represented when it comes to sex – in health documents, popular culture and advertising – and often represented through an ageist lens'

Adam Lea, marketing manager at PHE International, on Wild Secrets' Better with Age campaign

Case Studies

Wild Secrets

The Australian online sex toy retailer set out to break the stigma around sex for older citizens with a campaign encouraging over-65s to embrace their pleasure, offering a 20% seniors card discount in a 16-page mail order catalogue. The Better with Age campaign is part of the brand's broader mission to normalise sexual pleasure. The catalogue featured sexologist-approved educational content and was distributed in lifestyle villages, golf clubs and bowling clubs across the country.



Feeld

After a rebranding in November 2023, Feeld has been sure to include older faces and experiences in its brand imagery, focusing on the universal concepts of curiosity and fluidity while upholding the brand's goal of challenging societal and cultural dating norms and binaries. 'We're living in an era of rapid transformation,' said CEO Ana Kirova. 'People are discovering themselves in deeper ways and exploring different types of connections and relationships.'



Left to right: Wild Secrets, Australia and New Zealand; Feeld, Europe



Photography by Askar Abayev

Social: Social Seniors

The rise in unmarried people in mid-life leaves Baby Boomers even more vulnerable to the vagaries of ageing. The need for strategies to address the loneliness epidemic and the accepted social isolation of older groups is becoming imperative.

'In the US, older people are much more generationally isolated than in other countries,' says Ken Stern. Nearly 16m people aged 65 and older in the US lived solo in 2022, three times as many who lived alone in that age group in the 1960s, according to US Census data. The majority of these unmarried people are evidence of the rising grey divorce rate, according to CNN Health, and they face greater economic, health and social vulnerabilities than married Boomers. They need access to services, healthcare and products that recognise their needs beyond marital status.

'The things that break down some of these barriers physically, this sort of divide, are creating care networks, keeping older people involved in learning, in work and volunteering, anything that encourages engagement with their communities,' says Stern, who believes that these are all things that are extremely important, not just economically, but socially. 'We do a lot in the US to make it hard to do those things. We physically divide – see the growth of 55+ communities, which means the decline in multi-generational homes.'

The cultural norm for ageing has been one of decline, but in some societies there are attempts to address the need for social engagement and generational mixing, such as Spain's superilla. 'Spain is very good at it, they have something called the social superblocks that bring generations and communities together,' adds Stern, noting how Japan has had to soften its hard retirement age, while in South Korea and Singapore, life-long learning has become a constitutional requirement.

A Yale study by academic Becca Levy revealed that median survival was seven and a half years longer for those with the most positive beliefs about ageing, compared with those having the most negative attitudes. The fact that ageism knocks 7.5 years off lives – more than smoking – should be a wake-up call to brands, organisations and institutions.

'This is a dangerous experiment in age segregation,' Bobby Duffy, professor of public policy at King's College London and author of The Generation Divide, told LS:N Global. 'This is the most separate, by age, that the human race has lived, and we drifted into that without really thinking about it. We've got to not unthinkingly drift apart but, thinkingly, try to bring each other together again. These things can change, but you need some intervention.'

'We've got to not unthinkingly drift apart but, thinkingly, try to bring each other together again. These things can change, but you need some intervention'

Bobby Duffy, author, The Generation Divide

Case Studies

MEA Wisdom

Previously known as the Modern Elder Academy and founded by Chip Conley, Christine Sperber and Jeff Hamaoui, it was rebranded in 2023 as MEA Wisdom, referring to mid-life as a ‘calling not a crisis’. Its goal is to help people consciously curate the second half of their adult lives through a range of courses that cultivate purpose and doing good in the world.



Silver Pride and Misterb&b

LGBTQ+ short-term accommodation platform Misterb&b teamed up with Silver Pride and the non-profit Les Audacieuses et les Audacieux, which supports LGBTQ+ seniors in danger of isolation. First in Paris, then in Atlanta in 2023, Misterb&b reserved all its flats along the parade route for LGBTQ+ seniors so they can participate comfortably from a balcony or window.



Beck’s Brewery

In Brazil, Beck’s launched a limited-edition beer for those aged over 70. Repackaged in silver grey colours, the beer was reformulated with stronger bitter notes in view of how taste buds age and develop more resistance to acidic flavours. Fronted by an anti-ageism campaign imagined by AKQA-Brazil, in a tongue-in-cheek twist, the product is only available in stores when customers show their 70+ ID.



Left to right: Modern Elder Academy, Mexico; misterb&b, Silver Pride and Les Audacieuses et les Audacieux, France and US; Beck’s 70+ by Beck’s and AKQA-Brazil, Brazil

Foresight

Here, we expand on speculative future scenarios to 2030. Building on the Insight section, Foresight delves into what's possible: new directions, divergences or developments. For Boomers, we explore what an adjusted view of ageing could look like



AI-ging

The acceptance of AI companionship as a solution to isolation and bridging the care-giving gap could prove divisive in more ways than one.



The Becomers

Rejecting traditional retirement and with the prospect of becoming centenarians, Boomers are rewriting the meaning and purpose of later life.



Philanthropensioners

In response to their continued influence and power in society, Boomers will step up to the role of legacy-givers, actively fostering generational unanimity.



Grandpeers and Grandfriends

Valued grandpeers will pave the way for new generations supercharged by the powers of Flat Age exchange.



Left and right: Neural Sleeve by Cionic and Fuseproject, US

What is Foresight?

Foresights examine speculative scenarios 5–10 years in the future. Building on the Insight section, they showcase new directions, divergence or developments

AI-ging

Boosted by innovations in healthcare, the acceptance of AI companionship as a solution to isolation and the care-giving gap could prove divisive in more ways than one.

Not only will AI become a routine part of our healthcare, but it will also develop more empathetic skills. These will, in turn, be offered as a solution to the health-damaging epidemic of loneliness caused by the sequestering of older generations in many Western countries.

The global AI healthcare market is predicted to be worth almost £149bn ($188bn, €175bn) by 2030, according to Statista, and we will begin to rely on the new technology to help us achieve and maintain longevity goals. The focus will be on healthspan, not lifespan, and ensuring our longer lives are lived better.

Look to companies such as BioAge Labs, which is on a mission to extend healthy life by using AI to discover biomarkers to target molecular causes of ageing. AI technology will also be employed in tactile therapeutics that aid longevity, such as the Neural Sleeve bionic wearable created by California start-up Cionic and designer Yves Béhar's US-based studio **Fuseproject** designed to correct muscle movements in people with limited mobility.

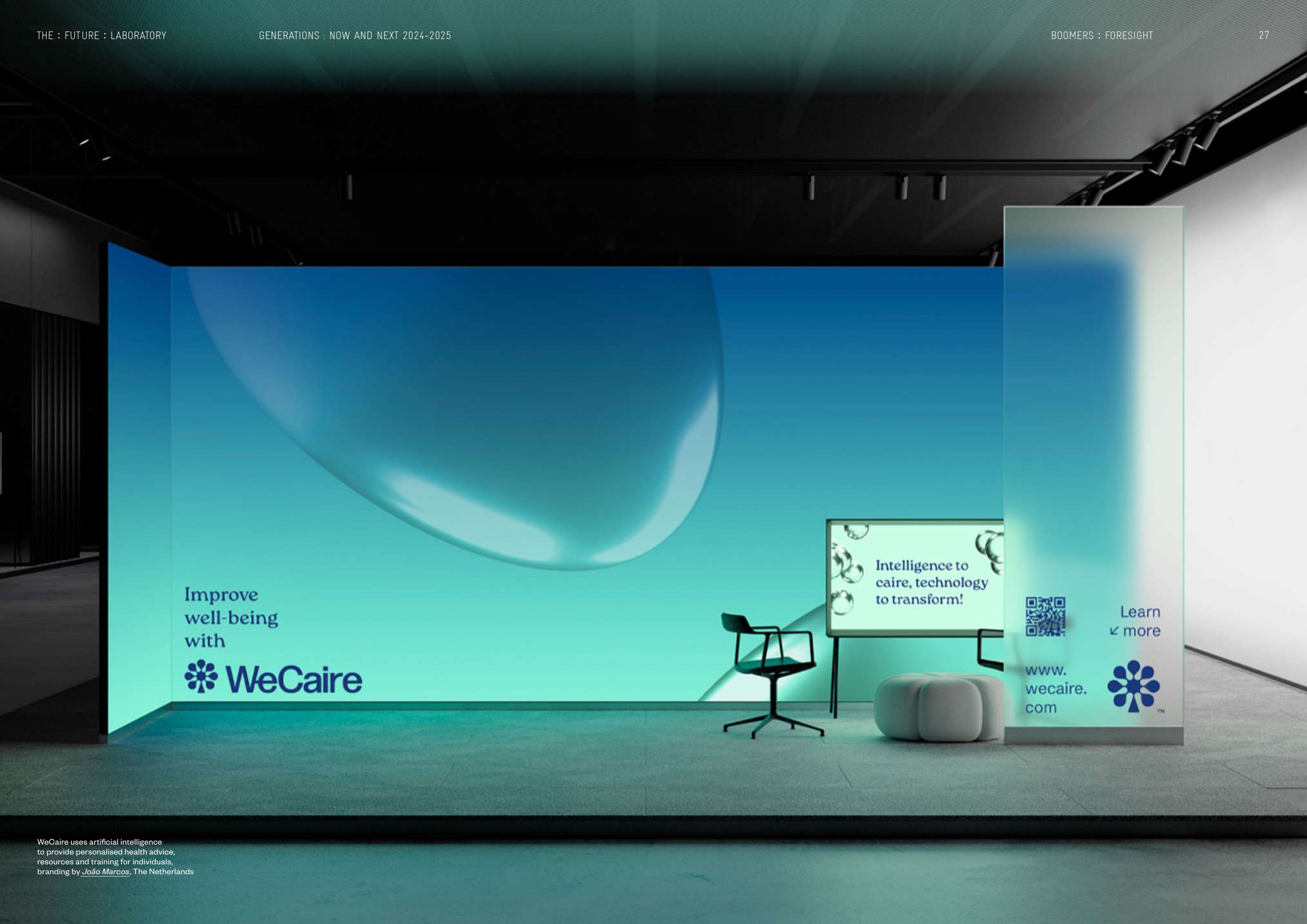
But the wealth gap among Boomers raises the question of who can afford to live longer and better. 'Yet even today with clamouring calls to 'conquer death' and press beyond previous bounds of human lifespan, questions of equity and justice go begging: 'Whose lives?',' highlights **ScienceDirect's** The Future of Aging in Smart Environments report.

'We just don't really know what the impact is going to be with AI, and in particular, empathetic AI. But there are others who are really concerned about it,' says Jean Twenge, who highlights a wider academic concern about whether AI companionship is a sticking plaster and not a solution. 'It's not real,' she adds.

The global AI healthcare market is predicted to be worth almost **£149bn** ($188bn, €175bn) by **2030**

Source: Statista





WeCaire uses artificial intelligence to provide personalised health advice, resources and training for individuals, branding by *João Marcos*, The Netherlands



Photography by Mart Production, Russia

‘Life-long learning is important to Boomers. Many are interested in continuing education, whether for career advancement, personal development or pleasure’

Stephan Chung, professor on the need for later life education opportunities, California State University

The Becomers

With a rejection of the traditional view of retirement taking hold and the prospect of becoming centenarians, Boomers are beginning to rewrite the meaning and purpose of later life.

Determined to leave their mark, younger Boomers enter their ‘retirement era’ in 2030, driven by a renewed focus on purpose and legacy, and determined to redefine this period of later life on their terms.

This rejection is not just about leaning in to an active, work-filled ‘pro-tirement’, but rather a total repudiation of this life stage and its connotations of stepping back and winding down. For those seeking to work to ensure more financial security in later life this is necessity-based, while for others, it is a conscious choice.

This will be followed by a re-assessment of all other life stages as they continue to blur, although it could be said that Gen Z have already stretched out their adolescence by hitting generational milestones such as getting a driving licence at a later age.

We see the beginning of the Era of Becoming, not ageing. This is defined as a constant iteration of self in accordance with personal values, circumstances and needs. If it is possible in 2024 to run for president of the US at age 81, then a new pacing of life is needed, with new milestones and markers.

‘Life-long learning is important to Boomers. Many are interested in continuing education, whether for career advancement, personal development or pleasure,’ says Stephan Chung on the need for later life education opportunities.





Left to right: Octopus Legacy is a tech start-up redirecting the conversation about death, branding by Sonder & Tell, UK; Photography by Karolina Grabowska, Poland

Philanthropensioners

Boomers will step up to the role of legacy-givers, actively fostering generational unanimity. In response to Boomers' continued influence and power in society will come a greater awareness of legacy, responsibility and duty. This could result in more mentorship positions, a surge in voluntary work and a focus on charitable endeavours – and lead to the rise of the philanthropensioner.

Look to organisations like Patriotic Millionaires, founded by communications strategist Erica Payne, gathering grassroots pace with its non-partisan goal of encouraging Americans with high net worth to restructure the US tax system so that wealthy people pay a greater share of their income in taxes. Its UK branch website states: 'We have plenty of wealth to go around – it's where it's stuck that's the problem.'

The environment will become an unavoidable flashpoint for unification as its effects become increasingly visible and concern shifts up the age range. Look to the **Grandparents for the Climate** – or Grootouders voor het klimaat – group in Belgium, a citizens' movement that aims to leave a liveable world for their grandchildren. 'We, Grandparents for the Climate, are not just grandparents,' the group says. 'We do more than defend the young. We take positions, inform, motivate and support initiatives.' The group employs civil disobedience and protest as tools, offering step-by-step guides on how to join marches.

'Their impact on society, the economy and cultural norms will continue to evolve, as will their approach to retirement, health and technology,' adds Chung. 'The legacy of this dynamic generation will influence not only their own ageing journey but also set precedents for future generations.'



Nike and Feng Chen Wang collection, UK

One in four seniors in the UK move closer to help their family out

Source: McCarthy & Stone

Grandpeers and Grandfriends

Valued grandpeers will pave the way for new generations supercharged by the powers of Flat Age exchange.

The potential of this more meaningful connection between the oldest and youngest age groups serves the Boomer need for renewed purpose. Their alignments will become magnified by a conscious effort on the part of business, society and government to foster greater cross-generational exchange, whether at work, in education or at home. Look to the Belong intergenerational community in Chester, UK, a 'care setting' in a purpose-built city centre block with a fully integrated children's research nursery, offering daily mixing between tots and residents, who go on 'prambles' together and have polystyrene snowball fights during screenings of Frozen.

This kind of proactive generational blending gets under way as 5G workplaces – those catering for five generations – and multi-generational households become more common. As younger generations expand their adolescence and living at home for longer becomes the norm, the crossover with older generations increases, especially for those grandparents who reject expensive, isolated retirement community models in favour of at-home care powered by new technologies and supported by Gen X and older Millennial children.

According to a survey by personal finance platform Credit Karma, nearly one-third of Americans aged 18–25 live at home with their parents or other relatives. 'We're hearing more and more about adult grandchildren living with grandparents,' says Donna Butts, executive director of Washington DC-based Generations United. If not at-home then they are neighbouring; one in four seniors in the UK move closer to help their family out (source: McCarthy & Stone).

This brings with it a renewed appreciation of our grandpeers, with the potential to broaden the perspectives of younger people and paving the way for a new generation supercharged by the powers of cross-age exchange. As younger generations search for authenticity and meaning away from the polarising effects of social media and the digital world, grandpeers offer a valuable social connection – despite their own embracing of technology, which has not affected their social interactions.

'Boomers have certainly embraced social media, particularly Facebook,' Jean Twenge, tells LS:N Global. 'But they have not shown as big a decline in how much time they spend with people in person as younger adults. I suspect that some of their social media time may have come out of tv time. And for younger folk, it's more often come out of time that used to be spent with people face to face.'

Strategic Implications

Our Strategic Implications are actions and future considerations for brands and businesses to contemplate



Marta Stewart for Sport Illustrated Swimsuit, US

Strategic Actions



Fill the care gap

With the growing focus on healthspan, Boomers will expect greater levels of independence and activity, but the challenges of age-related disease remain. Consider how you can meet the critical need for innovation in the supportive care sector



Take a life-long approach

At present, only 8% of US organisations include age as part of their diversity, equity and inclusion strategy (source: PwC via SHRM Foundation). Rethink how your business can support the Boomer need to upskill, reskill and skill-share in workplaces



Court the silver dollar

The combination of spending power and influence over younger generations is giving rise to ‘brandparents’. How can you match the values of these gatekeepers in order to create successful products and services for younger generations?

Left to right: Photography by Anna Shvets, Russia; Photography by RDNE, US; Pangaia, UK

Thought-starters



In the era of Becoming, not ageing, have you considered how your business can meet the need for life-long learning and re-invention?



As a new lexicon emerges replacing descriptors such as ‘old age’ and ‘late life’, when was the last time you checked your ageism?



When speaking to Boomers, how can you focus on their interests, passions and ambitions and not their age?

Left to right: You’re Not Wrong by Saga, UK; Photography by Vlada Karpovich, Poland; The Rochambeau Club, France



Centre for Ageing Better, UK

Born 1965–1980

Gen X
Now and Next

From *Ambiguity* to *Advocacy*

Having long lived in the shadow of Baby Boomers and Millennials, Gen X are racing against time to make their influence felt, while juggling their care-giving and financial responsibilities

At a glance

: Born between 1965 and 1980, Gen X were the last generation not to have the internet in their homes when growing up

: Gen X currently make up 31% of the global population. They are the second biggest generation in the UK, while in the US their population is only two percentage points below the largest generational group, Millennials (sources: Global Web Index Q1 2023, Statista, Statista)

: Seen as a forgotten generation, sandwiched between Baby Boomers and Millennials, Gen X play a key role as translators between the pre- and post-digital eras

: In the US this generation have an average retirement savings shortfall of over £356,000 ($451,000, €418,600) (source: 2023 Schroders US Retirement Survey)

: Gen X are more likely than any other generation to be dual carers, caring for both their children and their elderly parents (source: The Journal of the American Geriatrics Society)

The Big Quiet, US

Generation X, born between 1965 and 1980, are a sandwich generation that have long lived in the shadow of Baby Boomers and Millennials. Often referred to as the Forgotten Generation, this characterisation continues to ring true in their lack of exposure in the media and attention from brands and marketers.

With the youngest in their mid-40s and the oldest turning 59 this year, they didn't have the internet in their youth, but have embraced technology since joining the workforce. In this sense, Gen X play a pivotal ambassadorial role as generational translators between the pre-digital era and the digital native generations that followed.

Gen X currently make up 31% of the global population and 35.5% of the US workforce (sources: Global Web Index Q1 2023, Johns Hopkins University). They are more likely than any other generation to hold dual caring responsibilities for both children and ageing parents, leaving their time and financial priorities finely balanced between their home and work lives. Indeed, after an adulthood defined by a series of catastrophic financial events, including the Dot.com bust, the Great Recession and Covid, this generation are faced with the prospect of having to re-imagine the concept of retirement in the years ahead.

More tech-savvy than they're often given credit for, Gen X's focus on improving their mental health and halting climate change also matches that of younger generations. Sceptical, yet fiercely loyal to those who've earned their trust, with an independent spirit and a hankering for nostalgia, Generation X are in the process of redefining the period of mid-life in an age of increased longevity.

Drivers

Sandwiched between more influential generations, the Gen X mindset is driven by a strong sense of cynicism and detachment, but also by fierce independence and self-determination



The Forgotten Generation

Despite being one of the most prominent generations in terms of size and income, Gen X continue to feel overlooked by brands and marketers, and in the workplace.



Sceptical Loyalists

Generation X's cynicism and self-determined spirit make them harder for brands to court, but this also perpetuates great levels of loyalty for their favoured brands.



Impeded Influence

Generation X's ability to exert their influence at work, in politics and in wider society has been hamstrung by the durability of older generations.

The Forgotten Generation

Despite being one of the most prominent generations in terms of size and income, Gen X continue to feel overlooked by brands and marketers, and in the workplace.

Gen X are often referred to as the Forgotten Generation. Sandwiched between the two cultural powerhouses of Baby Boomers and Millennials, they are used to being overlooked and underserved by brands and advertisers alike. With the younger Gen Z and Gen Alpha starting to steal their own share of attention and Boomers enjoying a renaissance among brands, this feeling of invisibility has never been stronger.

Gen X make up 31% of the global population, according to data from Global Web Index Q1 2023, but Global Web Index data published by **Wavemaker** in its 2023 Finding the Gen X Factor report found that just 13% of Gen X feel represented in advertising. In addition, research by marketing effectiveness agency Warc in May 2023 found that they account for just 4% of industry research into different generations.

And it's not just brands and the advertising industry who ignore the generation. Gen X feel overlooked at work too: 79% of Gen X say they're forgotten in the workplace, overshadowed by younger and older workers, while Gen Xers are promoted at rates 20–30% slower than Millennials (source: **PeopleScoutUK**).

Despite all of this, Gen X remain influential both in terms of size and financial strength. In the UK, Gen X are the second biggest generation, according to **Statista**, while in the US they are only two percentage points smaller than the biggest generational group, Millennials (source: Statista). And according to the **US Bureau of Labor Statistics'** 2022 Consumer Expenditure report, Gen X have the highest average income rate of any generation, as well as the highest average annual expenditure. Perhaps they shouldn't be overlooked any more.

Only **5%** of brand spending on social media influencer marketing campaigns targets Generation X

Source: WPP media agency Wavemaker

What are Drivers?

Drivers are fundamental shifts and external forces that have the potential to reshape the future trajectory of a brand or business, also sometimes referred to as mega-trends or global forces of change. They differ from trends in that they are long-term structural forces that are pervasive, powerful and transformative



Peanut, US



73% of US Gen X are prepared to pay more to shop with their favourite brands

Source: The Marigold and Econsultancy 2023 Consumer Trends Index

Sceptical Loyalists

Generation X's cynicism and self-determined spirit make them harder for brands to court, but this also perpetuates great levels of loyalty for their favoured brands.

Gen X were the first modern generation to grow up experiencing both parents working outside the home in great numbers. Many Gen Xers, often referred to as 'latchkey kids', would return home from school to an empty house and need to fend for themselves. Compared to the helicopter parenting that would define Millennials' formative years, Gen X enjoyed great independence in their youth. This enabled them to forge a strong sense of self-determination that continues to inform their outlook in adulthood.

Driven by this spirit, rather than accepting things at face value, the Gen X mentality is often one of scepticism. Whereas other generations are more trusting, Gen X will ask questions first and make up their own minds. This mindset shapes the Gen X attitude to authority. Gen X are less likely than any other generation to think governments are trustworthy, with only one fifth (20%) agreeing that they trust their government (source: Ipsos Global Trustworthiness Monitor 2022).

This mindset also influences their approach to dealing with experts. Data from healthcare communications specialists GLC reveals that nearly half of Gen Xers are sceptical of what doctors say, a 48% increase compared to Baby Boomers. It is no surprise, then, that they are regarded as the first generation of self-directed healthcare consumers, who feel entitled to have a say in their own health decisions.

This scepticism also has great relevance to Gen X's relationship with brands. While they might be harder to convince than other generations, the trade-off is that once they accept a brand, they are fiercely loyal.



Left to right: Dis-loyalty programme by Ennismore; Viscero ECG Vest by Design Partners, UK

Impeded Influence

Generation X's ability to exert their influence at work, in politics and in wider society has been hamstrung by the durability of older generations.

Owing to the longevity of the Baby Boomers, Gen Xers have had to patiently bide their time while waiting to climb to the top of the food chain across all walks of life.

Research in 2023 found that more than 58% of the world's heads of state are still Baby Boomers (source: **Visual Capitalist**). They account for 104 global political leaders compared to only 38 Gen Xers, whose number currently include Emmanuel Macron of France and Volodymyr Zelenskyy of Ukraine. While a young Silent generationer (Joe Biden) and a Boomer (Donald Trump) are heavily expected to go head to head once again in the 2024 US presidential election, younger generations are queueing up to leapfrog Gen X to the top of the political pile. Already Millennials Jacinda Ardern and Alexandria Ocasio-Cortez have made significant political impacts in their countries.

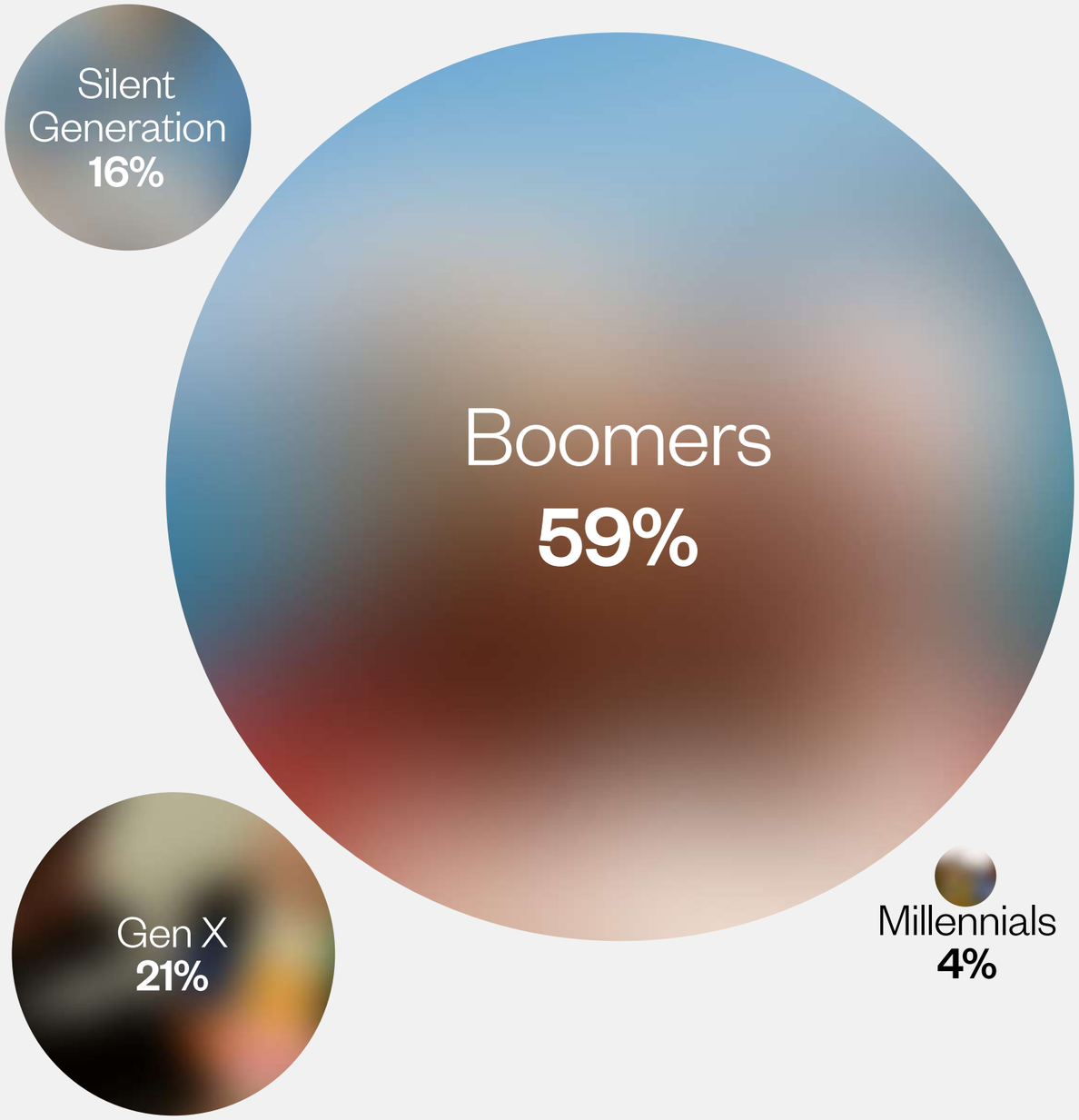
A similar story is unfolding for Gen X in the workplace. By the time the average Baby Boomer was 50 in 2005, 65 of the 100 CEOs of **Fortune** 100 companies came from that generation. Yet by comparison, in 2021, when the average Gen Xer was the same age, the generation were running just 23 of those companies. It is only in the past few years that Gen X have finally taken charge of the majority of Fortune 500 companies. The generation currently account for 267 Fortune 500 CEOs, but Boomers remain in charge of a significant 226 (source: Fortune).

This delayed power transfer has seriously affected Gen X's earning power. As the generation start to move out of the Boomers' shadow in the coming years, they will need to make up for lost time. They'll be looking to both earn and save more money to safeguard their long-term futures in retirement, while also wanting to exert their influence over the organisations they work for.

'It's not that we are individually silent or uninfluential, but when we talk about intergenerational connection, it's nearly always the oldest with the youngest, and we sort of skip Gen X'

Professor Bobby Duffy, director, The Policy Institute at King's College London

World heads of state by generation:



Data visualisation by The Future Laboratory, inspired by Edit Gyenge's visualisation of CIA World Factbook and Wikipedia data, UK

Insight

We assess the significant insights across each generation in relation to Success and Achievement, Technology, Health and Wellness, and Community and Identity



Success and Achievement

Faced with a wide range of financial priorities spanning their current and future needs, Gen X are in need of solutions that balance their monetary burdens.



Technology

Generation X women have made great strides in the workplace but are still fighting for the perimenopause and menopause support they need.



Health and Wellness

Gen X take a personalised approach to healthcare, embracing alternative solutions to maintain their physical and mental wellness.



Community and Identity

Gen X, as the sandwich generation, have a crucial bridging role to play in uniting their forebears with their digital native descendents.



Sustainability

Focused on environmentalism since their teenage days, Gen X are more willing than any other generation to lead by example on sustainable behaviour.



SUCCESS AND ACHIEVEMENT

‘To create a stable retirement for themselves, Gen X have to believe that tomorrow can be better, which can feel uncomfortable after a lifetime of: ‘yeah, whatever, never mind”

Emily Guy Birken, retirement expert and author

What is Insight?

Insights explore the nascent consumer behaviours, attitudes and trend responses emerging today that will evolve or gain traction in the near future through to 2025. Insights help brands and businesses to understand and identify the opportunities presented by this trend



Left to right: Photography by Karolina Grabowska, Poland; Photography by Ketut Subiyanto

Finance: Balancing Burdens

Faced with a wide range of financial priorities spanning their current and future needs, Gen X are in need of solutions that balance their monetary burdens.

Gen X may well have the largest average income and expenditure, according to data from the **US Bureau of Labor Statistics**, but many of this generation feel they are in a perilous financial situation, fearing they will never earn enough to retire.

In the UK, 50% of Gen Xers are either very worried (14%) or fairly worried (36%) about achieving the lifestyle they want in retirement (source: **International Longevity Center UK**). This is echoed in the US, where Gen Xers have an average retirement savings shortfall of over £356,000 ($451,000, €418,600) (source: 2023 Schroders US Retirement Survey).

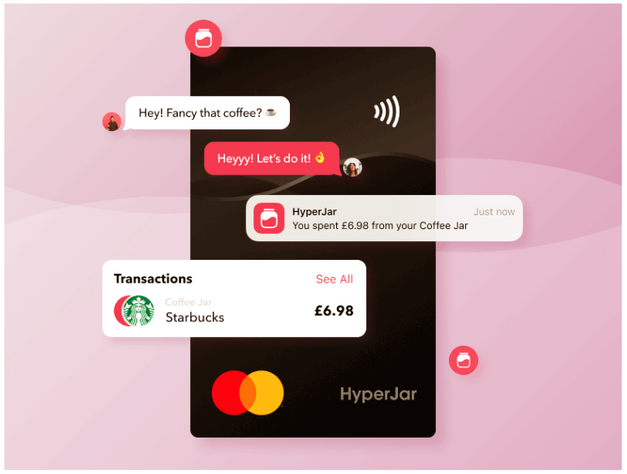
A key driver for this struggle is the varied financial burdens faced by the generation as they attempt to pay off their mortgages, support their families, save for the future and contribute to their pensions. Research from financial comparison service Bankrate shows that more than half of Gen X are sacrificing their pension savings and other financial obligations to help their children. These obligations vary from putting younger children through school to helping adult kids onto the property ladder.

Financial institutions and brands can play a key role helping Gen X to shoulder their financial burdens. But, Emily Guy Birken, retirement expert, co-host of Gen X podcast **Deep Thoughts About Stupid Sh*t** and author, told LS:N Global that they are hugely underserved in this space. ‘Compared with Millennials and Boomers, less education and media is geared to Gen X, which means they have fewer resources to help them meet their financial needs.’

Case Studies

HyperJar

HyperJar is a UK-based fintech solution aimed at families, which raised £18.9m ($24m, €22.2m) of Series A funding in 2023. It incentivises users to save money by offering them higher annual growth rates if they pledge to spend money with its partner brands. Referring to its solution as 'save now, buy later', the app-based platform promotes budgeting, financial literacy and savings.



Multipl

Multipl, which refers to itself as the world's first 'spendvestment' platform, helps people to save for desired purchases. Launched in India in 2020, the app lets users set any saving goal and make regular payments towards it. Partner brands, including Garmin and Decathlon, also make micro-contributions towards the goal, saving consumers up to 20%.



Left to right: HyperJar, UK; Multipl, India

72% of women want employers to take action to retain older women in the workforce by providing support through menopause

Source: British Standards Institution



Photography by Karolina Grabowska, Poland

Work: Equity Benefits

Generation X women have made great strides in the workplace but are still fighting for the perimenopause and menopause support they need.

Nearly one in three US-based Gen X women are the primary breadwinners in their household, a statistic that has increased dramatically by one and half times compared to previous generations (source: Wells Fargo). But this growth in stature in the workplace hasn't ushered in a revolution in the way women are treated in the workforce, a sentiment that is particularly true when it comes to menopause support.

In the US, a survey from the Bank of America and the **National Menopause Foundation** found that nearly two-thirds of women (64%) want menopause-specific support at work yet HR consultant firm Mercer reports that as few as 15% of US companies offer this.

Childcare provider **Koru Kids** conducted a poll in the UK with Research Without Barriers that revealed that 18% of menopausal or perimenopausal women are looking to quit their current roles because of their symptoms. The company estimates that at least 1.05m women in the UK alone are feeling this way, citing reasons such as a lack of support or understanding from management, the absence of any meaningful measures to improve their situation, and the extra pressure placed on them.

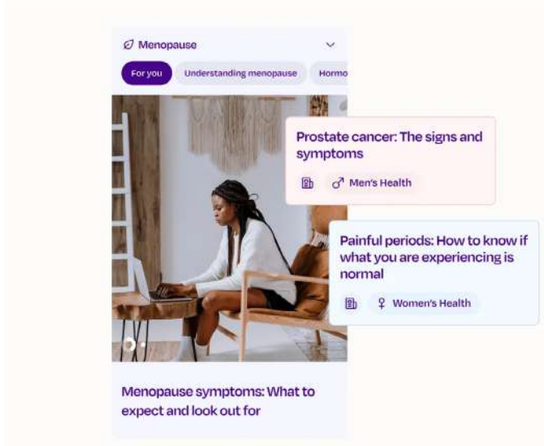
With worldwide menopause-related productivity losses soon expected to reach £118.4bn ($150bn, €139.1bn) a year, it is incumbent on employers to find ways to offer women going through perimenopause and menopause the support, flexibility and understanding they need to empower them to do their job on their own terms (source: Bloomberg).

Addressing this problem, which is now largely one faced by Generation X women in the workforce, will not only allow companies to retain the expertise and knowledge of these workers, but will also redraw the balance of the workplace for generations to come.

Case Studies

Lululemon and Fertifa

Athleisure brand Lululemon works with reproductive healthcare provider Fertifa to give all UK and European employees access to calls and chat with dedicated nursing practitioners for advice on their menopause and reproductive journeys. Aligning with the company's core missions of inclusivity, health and wellbeing, Lululemon's employees are invited to have one-to-one calls with Fertifa's experts or take part in monthly reproductive health Q&A sessions.



British Standards Institution

After its Lifting the Second Glass ceiling report that focused on how to retain older women in the workforce, business improvement organisation British Standards Institution (BSI) has launched a menopause care programme for its global employees. From January 2024, a partnership with the Maven Clinic gives 24/7 access to experts across a wide range of specialisms, including obstetricians, gynaecologists, nutritionists and career coaches.



Left to right: Lululemon and Fertifa, Europe; British Standards Institution, UK



Left to right: Photography by Darina Belonogova, Germany; TikTok

Digital Habits and Media: Forgotten Followers

Although often eclipsed by younger generations, Gen X are the fastest growing group on **TikTok**, bringing engagement and, increasingly, sales to social media platforms.

When it comes to technology and social media, Gen X are often overshadowed by younger digital natives. But in the past five years this generation have made the leap from laptop-first to mobile-first and are now said to be more likely to buy a product online via mobile than desktop computer (source: GWI).

And the data shows their social media behaviour is catching up with that of younger generations too. According to worldwide data from **Global Web Index** quoted in Wavemaker's Finding The Gen X Factor report, 92% of Gen X are on social media every day and they self-report as more confident users of new technology than Gen Z. The research also reveals that Gen X now make up nearly a third (28%) of **TikTok** users, making it the fastest-growing generational group on the platform.

Gen X aren't just scrolling on social media, they're converting their search into purchases; 55% of Gen X consumers in the US made a purchase from a social media post in the previous 12 months, which is a significant 20% year-on-year increase (source: **Marigold and Econsultancy** 2023 Consumer Trends Index).

While Gen X are appearing in great numbers on the same social media platforms as younger generations, they are often looking for a different style of engagement. Posts from Gen X creators are on average more than 75% longer than those from younger creators, and tend to be less direct and salesy, more informative and based on self-improvement (source: Wavemaker). This aligns with the generation's dislike for being sold to, in preference for having more equal, honest and transparent two-way conversations with brands (source: **ClearVoice**).

78% of Gen X social media users in the US think that TikTok is addictive

Source: SurfShark



Case Studies

AARP

The American Association of Retired Persons (AARP) has taken notice of the shifts in Gen X's social media usage to produce a series of TikTok videos to encourage them to start thinking about retirement. Its Gen X ASMR playlist includes nostalgia-packed ASMR videos featuring sounds from the 1980s and 1990s, including cleaning a Nintendo game cartridge, winding up a cassette tape and shaking an Etch-A-Sketch. The series is memorable and relatable without being salesy.



L'Oréal

Beauty brand L'Oréal is also courting Gen Xers on Instagram with longer self-help-focused content featuring relatable and more mature models and influencers. After receiving praise for a video of brand ambassador Eva Longoria covering her grey hairs in 2020, the brand's 2023 campaign for Rosy Oil Serum focused on bringing a glow to the 40-, 50- and 60-something influencers they worked with, promoting positivity and confidence rather than anti-ageing.



Left to right: ASMR playlist on AARP TikTok, Global; Age Perfect Golden Age Rosy-Oil Serum campaign by L'Oréal, the Nordic region

Health and Wellness

50% of US Gen Xers place wellness as a top goal, resolution or inspiration for 2024, with **32%** specifically referencing mental wellness

Source: American Express

Zoe, US

Health: Healthcare Pioneers

Gen X take a personalised approach to healthcare, embracing alternative solutions to maintain their physical and mental wellness.

Sceptical Gen Xers, regarded as the first generation of self-directed healthcare consumers, aren't won over by one-size-fits-all health solutions. They seek out, and are willing to pay extra for, the wellness options that best meet their needs and lifestyle. As a result, this generation are 18% more likely than the average to seek out alternative medicines and therapies (source: GWI). This may include embracing yoga and meditation or less mainstream therapies like acupuncture, reiki or even hypnotherapy, while being willing to try ingredients like CBD and functional foods to see whether their medicinal properties boost their health.

Research from the The Food Institute found that the top wellness-focused need states among Gen Xers are relaxation (54.4%) and digestive health (51.1%), while they seek foods with real, natural ingredients, and are more likely to be convinced by health claims that relate to hydration, gut health and energy-boosting.

Another big consideration for Gen X is mental wellness: 66% of Gen X say they prioritise mental health, while 67% believe that products with health benefits are worth the money (source: Leger). Gen X are on a par with Gen Z when it comes to opening up about mental health, with about one in three of the generation saying they are comfortable talking about it (source: GWI Gen X report).

As we move towards an age when all brands will be viewed as wellness brands, companies courting Gen X must build in opportunities for their products and services to boost the physical and mental wellness of their consumers.

Case Studies

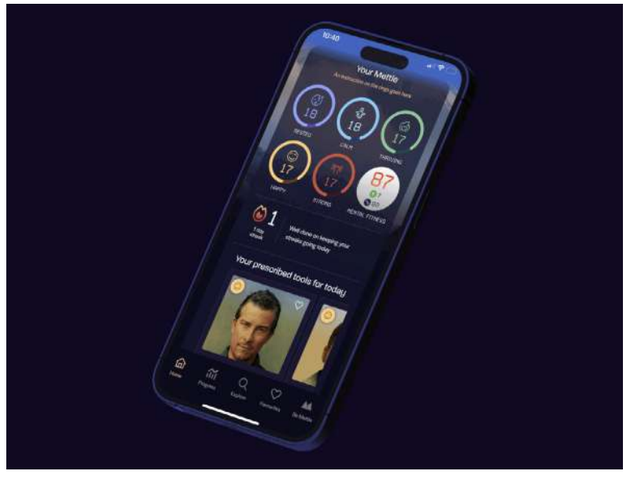
Holland & Barrett

The UK's leading health and wellbeing retailer Holland & Barrett has shown it is in step with Gen X's wellness expectations with the launch of its Drinks with Benefits takeaway service in November 2023. Its drinks include the latest trending health and wellness ingredients, focusing on supporting gut health, mental focus, energy and immunity, with customers able to personalise their orders.



Mettle

Aiming to eradicate the taboo faced by Gen X men focusing on their mental wellness, British Gen X survival expert Bear Grylls launched the Mettle app in November 2023. Positioned as a daily mental wellness companion, the AI-powered app creates a personalised toolkit of short daily activities, such as meditation, to help users boost their mood, improve focus and build positive habits.



Just Hotter

Just Hotter is an online store for women over 40 set up in August 2023 by former True Fit CMO Sarah Curran. The e-tailer sells skincare, beauty products, wellness supplements and wearable tech to support those going through menopause or perimenopause. Visitors can shop by symptom, with a selection of products addressing mood changes, hot flushes, bloating, brain fog and more.



Left to right: Holland & Barrett, UK; Mettle, UK; Just Hotter, UK



Left to right: Reimagining Luxury book launch, courtesy of Diana Verde Nieto, UK; Day Fever, photography by *Pedalo*, UK

Relaxation and nostalgia trump technology for Gen X, with **77%** of Americans aged 35–54 saying they would like to return to a time before humanity was 'plugged in'

Source: Harris Poll



Leisure: Nostalgic Pursuits

Gen X are prioritising relaxation in their leisure time, while gravitating towards nostalgic pursuits that put a chilled-out spin on the blow-out activities of their youth.

The key thing that Gen X in the US are looking for in their leisure time is relaxation. Watching tv and films is the generation's number one pastime, favoured by 39.8%, while walking (29.8%) is both the generation's second favourite leisure pursuit and preferred form of exercise (source: The Food Institute).

In line with these expectations, **Netflix**, number three in Gen X's top 10 favourite brands, is being reframed as a relaxation tool to align with the generation's needs (source: MBLM Brand Intimacy Ratings). This was most overtly seen with the launch of its Unwind Your Mind collaboration with **Headspace**.

Gen X's favourite pastimes of decades gone by are also getting nostalgic updates to fit in with the generation's change of lifestyle and ageing limbs. To appeal to the rave generation of the 1990s, Day Fever day club events are launching across the UK to allow Gen Xers to get on the dancefloor during the afternoon and still get home in time for dinner and a night in front of the tv. The brainchild of British actress Vicky McClure, the events open at 2:00pm and close at 8:00pm.

The original backpacking generation that Interrailed across Europe and beyond in their youth are also more likely than any other to travel alone (source: CBI Gen X report). Wellness and relaxation also remain core reasons for Gen X travel, particularly among empty nesters, singles and couples without kids (source: CBI).

Case Studies

Cabilla Cornwall Dirty Weekends

The Cabilla Cornwall retreats in the UK deliver on Gen X's yearning to unwind and escape during their leisure time. Launched originally in 2023, its Dirty Weekends prioritise relaxation and reconnection with nature. The weekends include a nature walk, woodland sauna, yoga and sound bath sessions alongside meals, cocktails and live music featuring local brands and bands.



Flashpack

In response to the fact that Gen X are more likely than any other generation to travel by themselves, Flashpack arranges group holidays for solo travellers aged 30–50. The company specialises in organising individuals into groups for 'can't-do-it-yourself' travel experiences. These include both short breaks and extended trips ranging from safari adventures to off-the-beaten-track escapades.



Left to right: Dirty Weekends by Cabilla Cornwall, UK; Habitas, AlUla, Saudi Arabia

Health and Wellness

Two in five US Gen Xers either manage or help manage their parents' healthcare

Source: GoHealth

Three Generation House by *Beta*. Photography by *Ossip van Duivenbode*, The Netherlands

Relationships: Generational Lynchpins

Gen X, as the sandwich generation, have a crucial role to play in uniting their forebears with the digital natives who follow in their families, workplaces and wider society.

As the final generation to go through their childhood without the internet before being inundated with technology in the workplace, Gen X play an important role as cultural translators between the pre-digital generations that preceded them and the digital native generations that followed.

'We are the hinge generation, in the middle,' professor Bobby Duffy, professor of public policy at King's College London, tells LS:N Global. 'If you group Millennials with Gen Z, and Baby Boomers with the pre-war generations, we are kind of that middle group that remember times before technology. So, we've got a bit of a blend of everyone and we're comfortable with technology now still.'

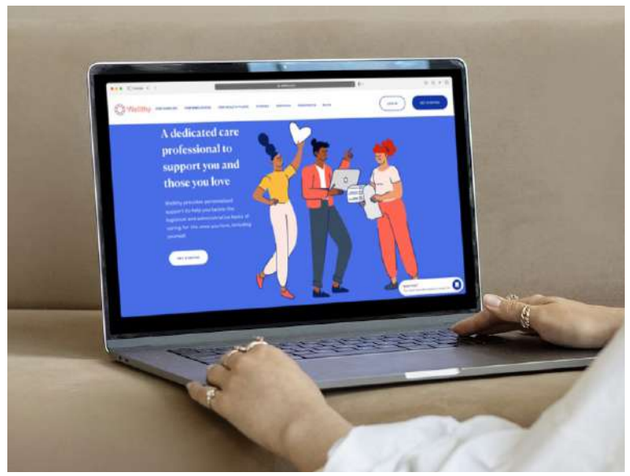
Nowhere is this guise as generational lynchpins seen more clearly than in the family. A recent study published in the **Journal of the American Geriatrics Society** highlighted that Gen X are more likely than any other generation to be dual carers. It found that 54% of those in their 40s and 36% of those in their 50s caring for a parent over 65 are also raising a child under 18. This compares to the national average of 24%.

It is no surprise, then, that CBI's Gen X tourism report reveals that Gen X are more likely than any other generation to travel with family members, including children, parents and grandchildren, as they fulfil this lynchpin role. And employers are starting to react to Gen X's position as generational lynchpins too, with benefits that help to lighten the load.

Case Studies

Cisco

Digital communications company Cisco has launched an employee benefits programme to support its Gen X workers with dual care-giving responsibility. It has partnered with digital healthcare provider Wellthy on its Caregiving Concierge offering that gives support and advice to help employees navigate the stressful and often complex role of looking after the health needs of their ageing parents, their children and their partners.



EasyJet

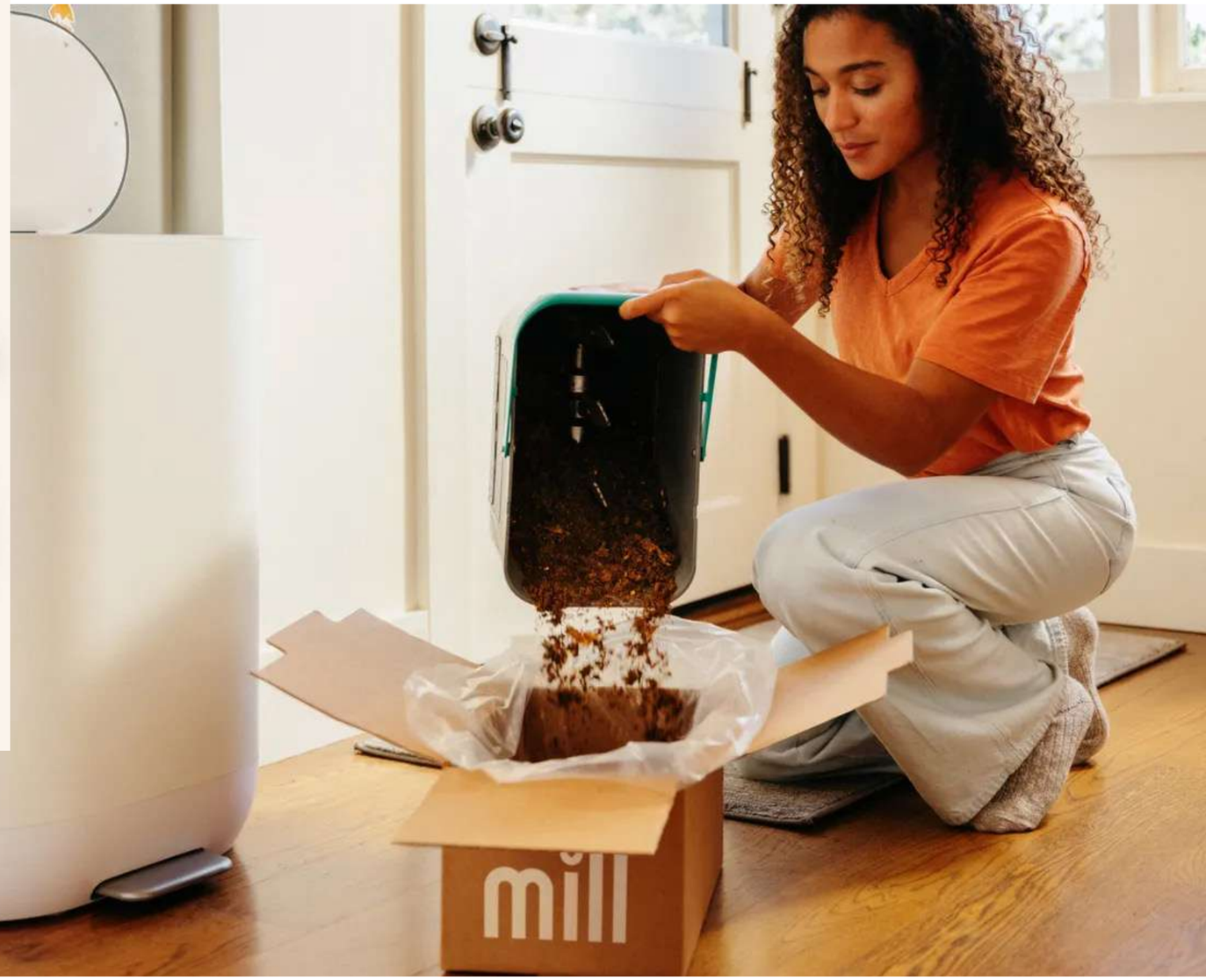
In response to the demand for multi-generational family holidays as Gen X travel with both their children and their parents, budget European airline EasyJet launched its Grans Go Free offer in February 2024. To lessen the financial burden of multi-generational travel, families leaving from the UK to specific European destinations will be able to apply for one free grandparent ticket.



Left to right: Cisco, US; Grans Go Free campaign by EasyJet, UK

Sustainability





Left to right: Mill is a kitchen bin that dehydrates food waste to encourage more convenient eco-friendly habits at home, US

Individual: Responsible Recyclers

Focused on the best outcomes for the planet since their teenage days, Gen X are more willing than any other generation to lead by example on sustainable behaviour.

Gen Xers were the original teenage environmental activists. Data from the Monitoring the Future survey, analysed by Jean M Twenge for her 2023 book Generations, found that more than 80% of Gen X teens in the US agreed that 'people will have to change their way of life to help the environment'. This figure is greater than for any other generation before or since, and this focus on individual responsibility continues to pervade Gen X's commitment to sustainability.

The EY and JA Worldwide Generational Sustainability Survey 2023 found that Gen X are more likely than any other generation to agree that it is down to individuals to make the world more sustainable (31%). Members of this generation are also the most likely to say they are either extremely or very willing to make changes in their daily life (65%).

The report also highlighted that Gen X are the most likely generation to embrace the ethos of recycle, upcycle, re-use, with 39% saying they have adopted these behaviours. This underlines the generation's willingness to make small changes to their everyday behaviour in the name of sustainability. Brands wishing to appeal to Gen X should bake the ideals of recycle, upcycle, re-use into the lifecycle of their products and services to make it easier for consumers in this generation to achieve their sustainability goals.

Almost **90%** of Gen X consumers say they would spend at least **10%** more on any kind of sustainable product

Source: First Insight

Case Studies

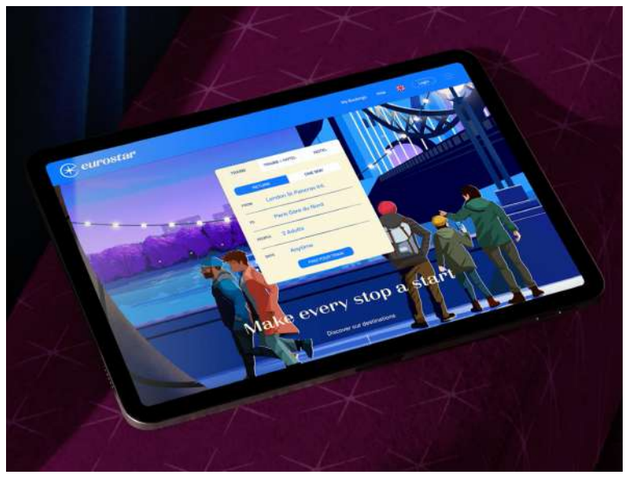
Ridwell

Seattle-based Ridwell satisfies Gen X's commitment to recycling via a subscription service that collects hard-to-recycle items. Each member receives a cloth sack for each category they wish to recycle which is collected every two weeks from a Ridwell box outside their front door. Ridwell expanded to Los Angeles in January 2024.

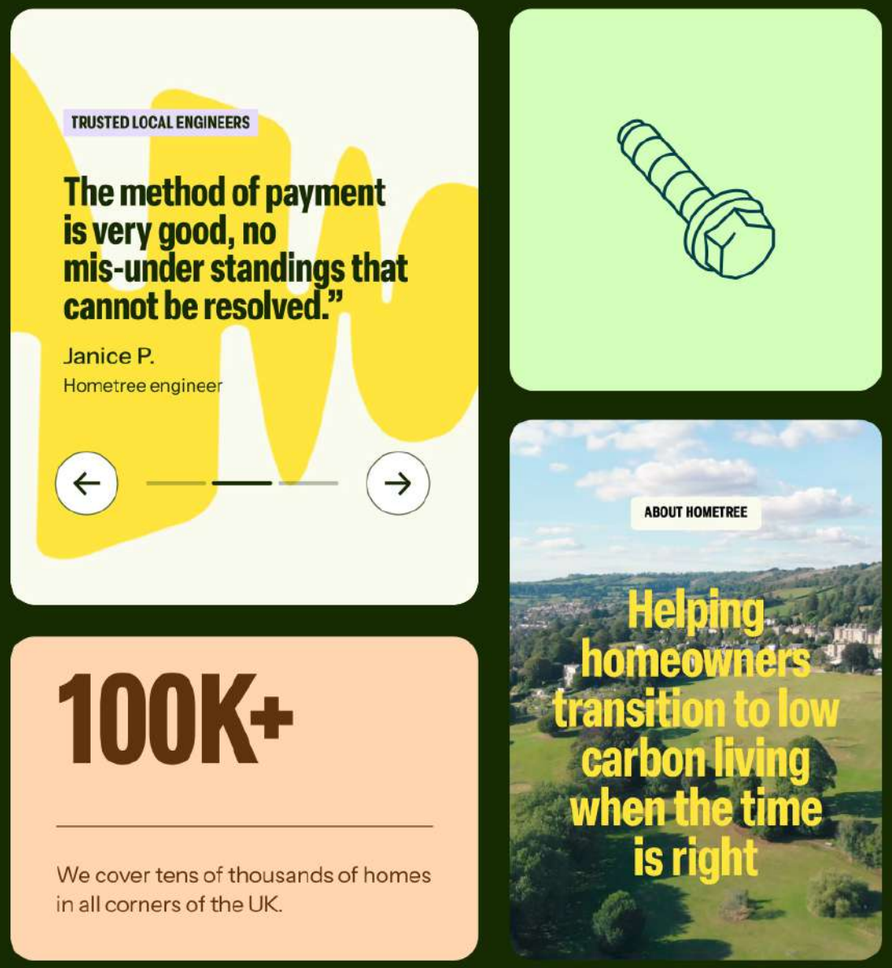


Byway

No-flight travel agent Byway meets Gen X's expectations of sustainability by arranging sustainable travel itineraries using trains, bikes, buses and ferries in a bid to make slow travel mainstream. While helping to reduce the carbon impact of travel by avoiding planes, Byway offers personalised trips with customer service via WhatsApp.



Left to right: Ridwell, US; Byway, UK



63% of US Gen Xers believe that climate should be our top priority to ensure we leave a sustainable planet for future generations

Source: Pew Research Center

Societal: Eco-leaders

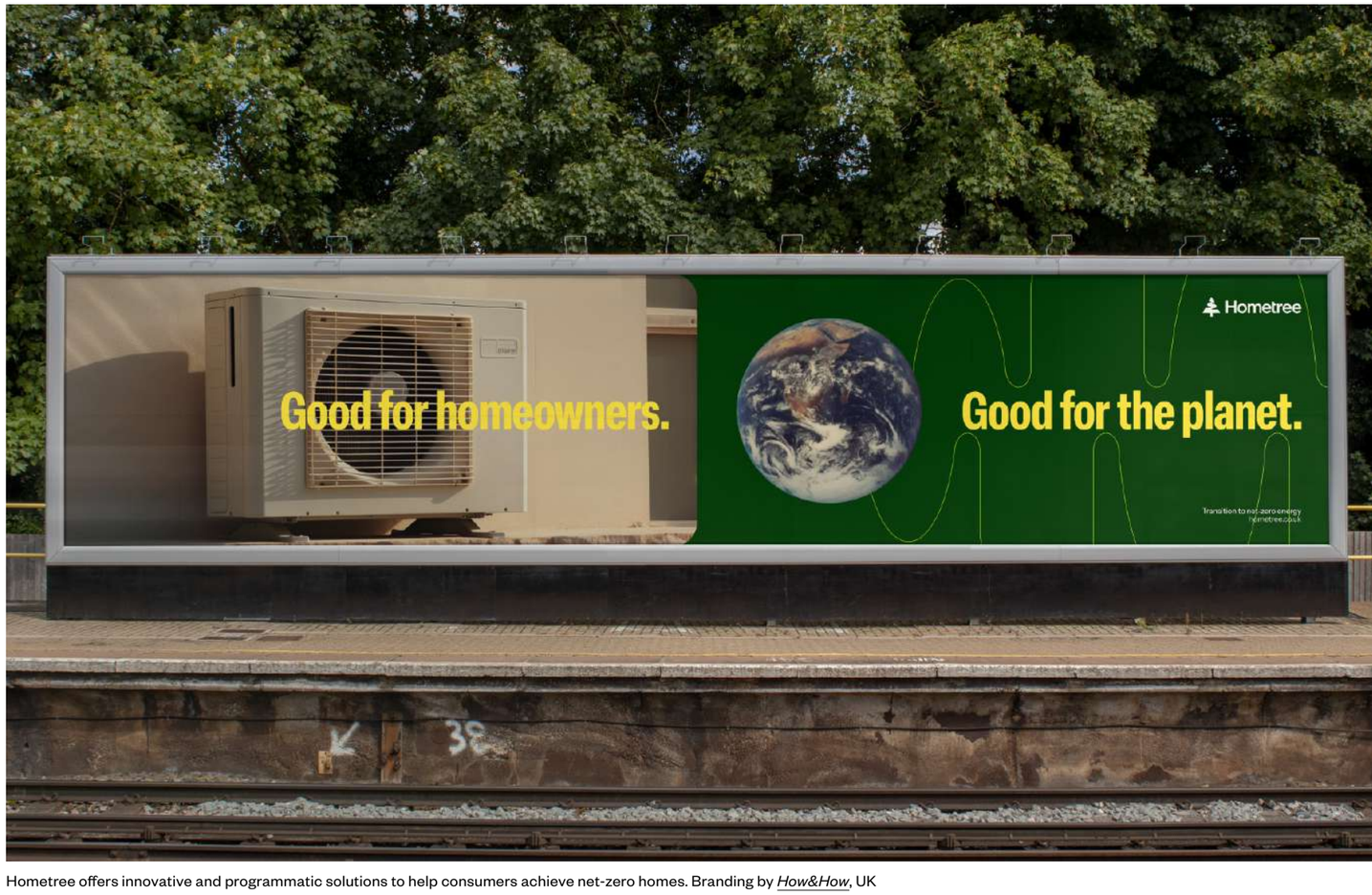
Gen X are taking the lead in ensuring big businesses and corporations take their share of responsibility in the growth of sustainable practices around the world.

Gen Xers, more than any other generation, believe individuals hold the key to climate change, meaning that just 33% think it is down to governments to make the world more sustainable, significantly less than Baby Boomers (44%), Millennials (43%) and Gen Z (41%). But Gen Xers do call to account corporations and businesses more than any other generation, with 18% believing these big players are the most responsible for driving positive change (source: EY and JA Worldwide).

This may explain why one of the most notable activist organisations of today was set up by three Gen Xers. **Extinction Rebellion** was founded in 2018 by Simon Bramwell, Dr Gail Bradbrook and Roger Hallam to campaign for immediate action to reverse the climate emergency, halt biodiversity loss and lobby the government into long-term structural change. While younger activists may receive more column inches, this underlines the leadership role that Generation X can still play in mobilising other groups.

And despite the generation’s overt scepticism and nihilistic attitude, it does have a more hopeful outlook for the future than other generations. The **EY and JA** Worldwide Generational Sustainability Survey 2023 reports that 60% of Gen X are at least somewhat hopeful for the future, which is higher than any other generation.

Going hand in hand with Gen X holding companies to account when it comes to sustainability, the generation also show a strong preference for buying from sustainable brands. Two thirds (67%) of US Gen Xers say that, when given the choice, they prefer to buy from sustainable brands (source: First Insight). This sends a clear signal to brands that they must demonstrate their credentials as sustainability leaders if they want to be considered by Gen X.



Hometree offers innovative and programmatic solutions to help consumers achieve net-zero homes. Branding by *How&How*, UK

Case Studies

Patagonia

Sustainability-focused outdoor clothing brand Patagonia gave a clear indication that it meets Gen X's expectations of sustainable leadership when founder Yvon Chouinard gave the company away to a trust. The Patagonia Purpose Trust has been tasked with ensuring all profits go towards the ongoing fight against climate change. According to Chouinard: 'Earth is now our only shareholder.'



Faith In Nature

Ethical British personal care brand Faith In Nature claims to be the first company in the world to appoint Nature to its board. In late 2022 it added a new position to its executive committee, known as nature's guardian. The move was taken to ensure that during every business meeting and with every decision, one person is specifically tasked with representing the best interests of the planet.



Left to right: Patagonia, US; Faith in Nature, UK

Foresight

Here, we expand on speculative future scenarios to 2030. Building on the Insight section, Foresight delves into what's possible: new directions, divergences or developments. For Gen X, we explore how this generation will seek to balance their financial and family priorities while rethinking the concepts of retirement and middle age



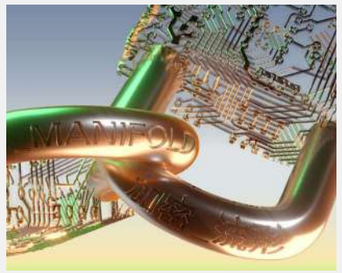
Middlescence Re-invention

Generation X are reframing middle age as a time for proactive upskilling and positive reinvention, rather than lamenting the end of their youth.



Worktirees

Generation X will re-invent the concept of retirement with hybrid lifestyles that balance the financial benefits of work with the leisure possibilities of retirement.



Budgetary Barterers

Faced with numerous financial priorities, Gen X will embrace a new consumer mindset based on the principles of bartering to get the products and services they desire.

Middlescence Re-invention

Generation X are reframing middle age as a time for proactive upskilling and positive re-invention rather than lamenting the end of their youth.

As members of the Silent and Greatest Generations reached their 50s, they were firmly focused on the descent towards the end of their lives. As life expectancy, and more importantly healthy life expectancy, has grown significantly in recent decades, Baby Boomers have started blazing a trail for a new way to live post-50 that is less about ageing and more about becoming a new you.

Following in their footsteps, and buoyed by the increased longevity of life, Gen X will rewrite the rules for this period of life to shift the focus away from it being the end of an era, towards considering it a transitional period of re-invention. Gerontologists Ken Dychtwald and Barbara Waxman, who study the act of ageing, have popularised the concept of middlescence, an adult version of adolescence that provides space to grow and adapt ahead of the challenges in the second half of our lives.

Hotelier **Chip Conley**, the founder of the **Modern Elder Society** (now known as **MEA Wisdom**), and author of the recently released book Learning to Love Midlife: 12 Reasons Why Life Gets Better with Age, released a Ted Talk in 2023 entitled An Alternative to the 'Midlife Crisis'. In his talk he proposes that rather than thinking in terms of a mid-life crisis, Gen Xers in their 40s, 50s and 60s should be thinking about a mid-life chrysalis.

Gen Xers hitting 50 can reasonably expect to live for another 30 years or more, the lion's share of which they will be active for. Thus, thinking in terms of constant evolution and continued growth is much more likely to resonate with them than discussions of mid-life. Brands should be talking to Gen Xers in these terms and helping them flourish during their middlescence to help them adapt physically and mentally to their new roles in the workplace, in family structures and beyond.

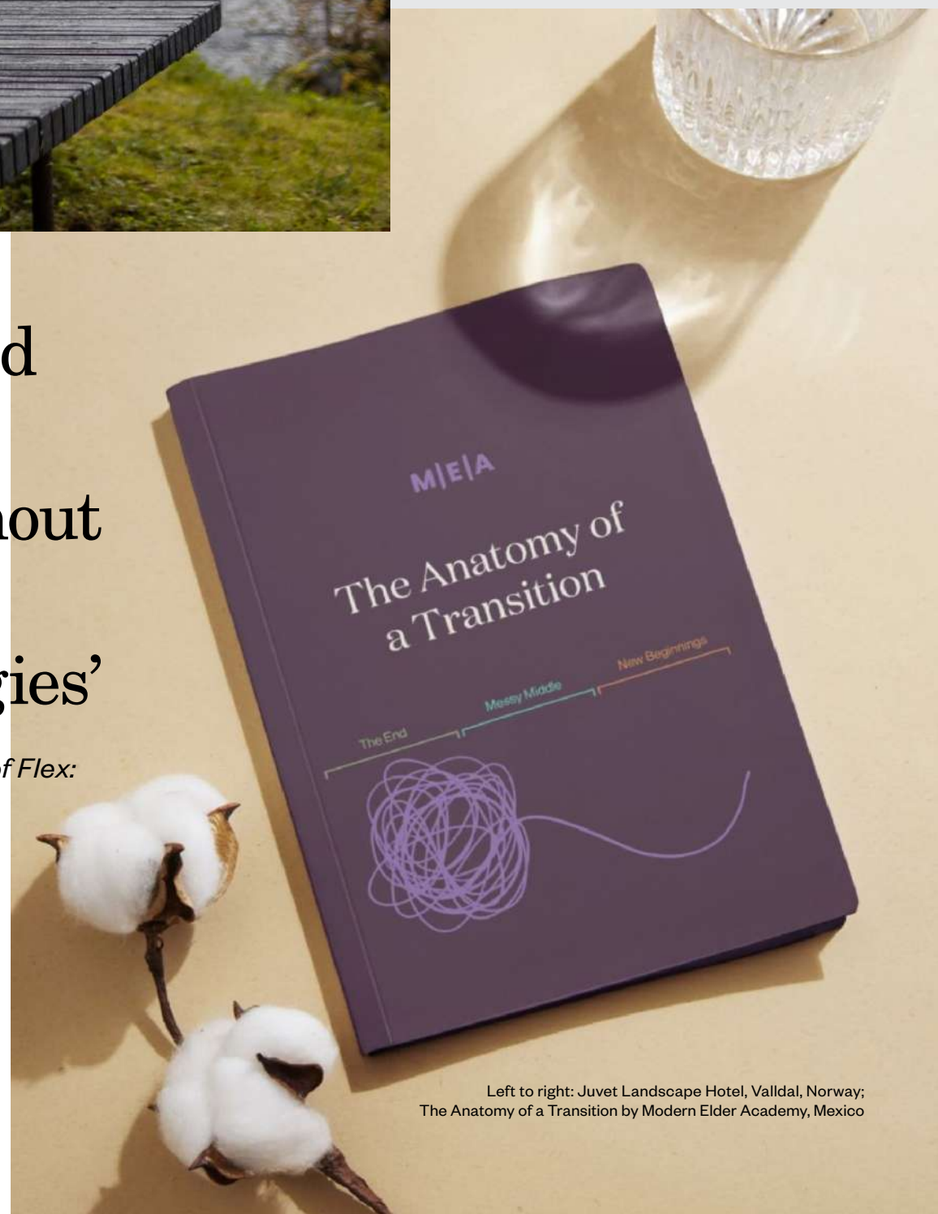


What is Foresight?

Foresights examine speculative scenarios 5–10 years in the future. Building on the Insight section, they showcase new directions, divergence or developments

‘Learning will not be front-loaded at the start of our lives, but will have to be redistributed throughout our lives so we can adapt to changing cultures and technologies’

Annie Auerbach, co-founder of cultural research studio Starling, and author of Flex: Reinventing Work for a Smarter, Happier Life



Left to right: Juvet Landscape Hotel, Valldal, Norway; The Anatomy of a Transition by Modern Elder Academy, Mexico

‘Gen X will have to not just work longer but work smarter – that might be incorporating sabbaticals along the way, retraining and upskilling, and also pauses to find meaning in their work’

Annie Auerbach, co-founder of cultural research studio Starling, and author of Flex: Reinventing Work for a Smarter, Happier Life



Photography by Darina Belonogova, Germany

Worktirees

Generation X will re-invent the concept of retirement with hybrid lifestyles that balance the financial benefits of work with the leisure possibilities of retirement.

A 2023 report found that only 22% of Gen X workers are very confident they will be able to fully retire with a comfortable lifestyle (source: TransAmerica Center For Retirement Studies). In addition, the report reveals that 31% of Gen X say they’ll probably want to do some form of paid work during retirement, a significant 10 percentage points increase compared to Baby Boomers.

Retirement expert and the author of The Five Years Before You Retire, Emily Guy Birken, tells LS:N Global that the financial concerns of Gen X, coupled with their increased health, could see them re-invent the concept of retirement entirely.

‘It’s important to remember that retirement, as we currently think of it, is a modern invention,’ she says. ‘I believe Gen X will blaze a trail that works for them, as they have done throughout their lives. So, they may not get the gold-watch-and-golfing retirement at age 65 that previous generations enjoyed, but I believe they will find a way to take care of themselves financially and enjoy their lives in their 60s and 70s, by working part-time, freelancing, consulting, or otherwise finding less strenuous but enjoyable paid work.’

In this context, the generation will be transitioning to ‘worktirement’, rather than retirement, in their 60s, where they work a couple of days a week alongside an increase in time spent on leisure pursuits. The benefits will not be purely financial. In the wake of the loneliness epidemic and the isolation felt by many during the Covid pandemic, the camaraderie and community will also offer significant boosts.

As the oldest Gen Xers approach their 60s and move to within striking distance of traditional retirement age, employees and brands must support their transition into ‘worktirement’. This switch will have interesting implications for businesses, which will have the opportunity to create new part-time roles that keep the expertise of Gen X in their organisations for longer.

Budgetary Barterers

Faced with numerous financial priorities, Gen X will embrace a new consumer mindset based on the principles of bartering to get the products and services they desire.

The fact that Gen X have the highest average income of any generation, according to the **US Bureau of Labor Statistics**, is often conflated with the belief that they have the biggest disposable income. But scratching below the surface tells a different story. Research from PYMNTS Intelligence and Sezzle shows that Gen X have the biggest debt of any generation, at an average of £196,860 ($248,000, €231,345). And, while trying to service this debt, Gen X also urgently need to reduce their pension savings shortfall, while many have significant familial financial obligations.

When The World Economic Forum examined what the different generations in the US spend their money on, it found that Gen X outspend every other generation on necessary, functional outlays such as housing, transport and education. Indeed, State Street Global Advisors' Inflation Impact Survey found that Gen X have reduced their discretionary spending significantly more than any other generation in recent years, with 61% cutting back on dining out, 41% reducing holiday spending and 39% delaying major purchases. This paints a more realistic picture of where Gen X are financially as they struggle to balance all of their economic priorities.

In the wake of this, a new Gen X mindset is emerging that is open to bartering in different ways to stay on budget while getting the products and level of service they desire. Brands can win their loyalty by engaging with this Budgetary Bartering to help them to spend less, save more and invest wisely. The Marigold and Econsultancy 2023 Consumer Trends Index reveals how brands can do this by underlining the value of loyalty programmes for the generation, 73% of whom consider them to be important or critically important.

But the real game-changer is their willingness to give up their data as part of a fair, two-way value exchange. The report found that a huge 97% of Gen X consumers are prepared to trade data for discounts or coupons. This new mindset will define how Gen X spend in the years ahead, and brands must get on board to enable them.





Left to right: Shopify Retail Kit, US; Keys to NYFW by Afterpay, US

75% of Gen X consumers are comfortable sharing information about their hobbies in return for a better service

Source: Marigold and Econsultancy

Strategic Implications

Our Strategic Implications are actions and future considerations for brands and businesses to contemplate



Photography by Polina Tankilevitch, Russia

Strategic Actions



Orchestrate their re-invention

Find ways that your brand can support Gen Xers through their Middlescence quest of discovery, growth and re-invention, empowering their constant evolution



Earn their loyalty

The least promiscuous consumer cohort, Gen X show fierce loyalty to brands that help lighten the load of their care-giving and financial obligations



Boost their health

All companies courting Gen X must think like a wellness brand to ensure their products and services boost the physical and mental health of their consumers

Left to right: Moving With Menopause by P.volve in collaboration with Elektra Health, US; Photography by RDNE, US; Luma concept by Morrama Lab, UK

Thought-starters



How can you cater for the potential of Gen X on social media with longer content that is relatable and useful, rather than salesy?



Taking inspiration from Day Fever club events, how can you use nostalgia to make your products and experiences resonate with Gen X?



How can you tap into Gen X as generational translators to bridge the gap between older and younger consumers and employees?

Left to right: Photography by CottonBro, Russia; Symbol identity by High Tide, US; Photography by Askar Abayev



Mr Porter and Arket, Europe

Born 1981–1996

Millennials Now and Next

From *Pink* to *Prime*

After a stuttering start to their adult lives, the first generation to use the internet as children are hitting their prime earning years while rebelling against traditional nominated life paths

At a glance

: Born between 1981 and 1996, Millennials were the original social media masters and have been smartphone-first since their teenage years or early 20s

: Millennials overtook Baby Boomers as the largest generation in the US in 2019, the same year that Gen Z overtook them globally as the biggest generation ever (sources: US Census Bureau, Bloomberg/UN)

: By 2025, Millennials are expected to make up 39% of the UK workforce, which could rise to 70% by the end of the decade as older generations retire (source: French Chamber of Great Britain)

: Millennials are more educated and less religious than any US generation that preceded them (source: General Social Survey Data)

: Millennials are buying homes, having children and getting married later in life than any previous generation (source: University of Cambridge, Humboldt University, Sciences Po)

Photography by Shvets Production

Millennials, born from 1981 to 1996, are currently the largest generation in the US and the UK. Statistically the most educated generation ever, with the oldest Millennials turning 43 this year and the youngest approaching the end of their 20s, their prominence in the workforce looks set to boom in the coming years.

By 2025, Millennials in the UK will make up 39% of the workforce, which could rise to 70% by the end of the decade as older generations retire (source: **French Chamber of Great Britain**).

Variously referred to as the Unlucky Generation and the Screwed Generation because of their financial prospects, and the Optimistic Generation because of their unabashed confidence shown since childhood, they are leading the charge for younger generations against traditional nominated life paths.

Significantly less religious than their forebears, according to General Social Survey data, Millennials are questioning the necessity of marriage and parenthood, while pushing for true gender equity in the workplace.

Beset by depression, stress and anxiety at levels greater than older generations, Millennials value brands that can bring elements of relaxation and escapism into their day-to-day lives.

Adept at balancing their financial constraints to prioritise splurges on once-in-a-lifetime experiences, Millennials are also optimistic about the role of technology and expect its seamlessness to touch all areas of their lives.

Drivers

Financial struggles and health concerns are driving Millennials' attitude to adult life as they follow a different path than their parents' generation



Optimistic Improvisers

As the reality of adulthood didn't match the idyllic expectations of Millennials in their youth, they have re-appraised and optimised all areas of life.



Late Achievers

Whether by choice or as victims of circumstance, Millennials are reaching traditional life milestones later than preceding generations.



Wellbeing Crisis

The rise of anxiety, depression, and alcohol and drug dependency is threatening the mental and physical wellbeing of the Millennial generation.

‘Millennials often appear as confident, but research has shown they have high levels of anxiety. This anxiety is often hidden under a veneer of confidence’

Elisabeth Kelan, professor of leadership and organisation, Essex Business School, University of Essex

What are Drivers?

Drivers are fundamental shifts and external forces that have the potential to reshape the future trajectory of a brand or business, also sometimes referred to as mega-trends or global forces of change. They differ from trends in that they are long-term structural forces that are pervasive, powerful and transformative

Nobu Hotel Portman Square’s Shiawase experiences campaign, London, UK

Optimistic Improvisers

As the reality of adulthood didn’t match the idyllic expectations of Millennials in their youth, the generation have re-appraised and optimised all areas of life.

Coming of age after the ultra-cynical Generation X, Millennials are often referred to as the Optimistic Generation. They grew up as the world was embracing the ideals of individualism, self-focus and self-esteem, and this shaped their demeanour. According to Dr Jean M Twenge’s analysis of The Freshman Survey and Monitoring the Future database, as both high school and college students, US Millennials over-indexed compared to every other generation at the same age in believing that they were of above average intelligence and would be a success in adult roles.

But upon reaching adulthood as the Great Recession of 2007/2008 was changing the economic outlook of the world, they found things were different from their expectations. They were woefully unprepared for a reality in which they faced greater financial hardship than their parents, while finding it harder to get a good job and buy a house. This led to the generation inventing the term ‘adulting’, referring to the drag of having to do boring, but essential grown-up tasks.

The generation started to be characterised as unlucky and screwed, and perhaps with good reason; Ameriprise Financial research 2023 shows that they are nearly twice as likely as Generation X or Baby Boomers to have relied on financial help from family members, with 78% having done so.

Despite these knock-backs, Millennials remain the most optimistic generation of Americans, with more than four in five (84%) feeling upbeat about the future (source: The Harris Poll). This underlines the generation’s focus on re-appraising what is important in life and finding new ways to thrive.



Late Achievers

In some instances out of choice, and in others as prisoners of circumstance, Millennials are reaching traditional life milestones later than preceding generations.

A combination of greater levels of education, changes in societal norms and the challenging financial landscape have seen Millennials reach common life stages significantly later than previous generations.

According to a Millennial study by the University of Cambridge, Humboldt University Berlin and French research university Sciences Po: 'By age 35, 17% of Baby Boomers had followed a path in which they progressed from college into prestigious professional careers like law and medicine, whereas only 7.3% of Millennials did the same.'

Millennials, often referred to as Generation Rent, are also moving into home ownership later. An analysis of government data by online real estate marketplace Apartment List found that by their 30th birthday, just 42% of US Millennials owned their own home, a significant drop from Gen X (48%) and Baby Boomers (51%). The difference is even more stark in the UK, where the Institute for Fiscal Studies (IFS) reveals that, while 55% of 25–34-year-olds were home-owners in 1997, this number fell to 35% by 2017 as the oldest Millennials came of age.

Millennials are also more likely to have children later than other generations, if at all. The average age of UK women at the birth of their first child rose by more than three years from 1990 to 2018, from 25.5 to 29 (source: UNECE Statistical database).

This delay in life stages has often led to the characterisation that the generation will never have children, own a house or have a prestigious career. While this may be true for many, for others the reality is that their extended time in education, compared to previous generations, and the chaotic financial landscape of their adult years, have meant they will simply reach these stages later in life.



Left to right: Generation Rent by Chloe Timperley, UK; *OMSE's* identity for Ark, a co-living space designed to provide a practical alternative to living in London, UK

47% of Millennials expect starting a family to become harder or impossible

Source: Deloitte's Gen Z and Millennial survey

Wellbeing Crisis

The rise of anxiety, depression, and alcohol and drug dependency is threatening the mental and physical wellbeing of the Millennial generation.

Despite being the most educated generation of all time and often referred to as the most optimistic, Millennials are facing some significant wellbeing declines.

The **Population Reference Bureau's** index of women's wellbeing, updated in November 2023, worryingly found that Millennials are the first generation of women since the (so-called) Silent Generation who are seeing declines in overall wellbeing. Despite the index recognising the generation's gains in education and employment, it noted that Millennial women's physical health and safety has worsened in recent years, threatened by rising suicide, homicide and maternal mortality rates.

According to data from the US National Survey on Drug Use and Health, the **National Vital Statistics Systems** and the **Centers for Disease Control** and **Prevention's WISQARS** database, American Millennials of both genders are also more likely to die deaths of despair, including overdose, suicide and liver disease, than any other generation. The use of marijuana and hallucinogenic drugs, as well as binge drinking, are also at historic levels among older Millennials and younger Gen Xers aged 35–50. In 2022, 29% of that group reported binge drinking, up from 23% in 2012 (source: **National Institutes of Health**).

This paints a worrying picture for the generation that all employers and brands courting them must play a part in trying to reverse.

A third of US Millennials have health conditions that reduce their quality of life and life expectancy

Source: Blue Cross Blue Shield Association

Sister Circle is a charity that empowers women from diverse communities in East London to access better healthcare. Branding by *Droga5*, UK

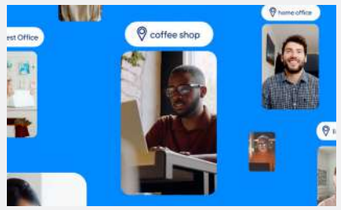
Insight

As Millennials move further into adulthood, we reveal significant insights that explain their quest to take control of their finances and health, while finding the right work-life balance



Success and Achievement

Faced with continued concerns about the cost of living crisis, Millennials are looking for ways to proactively improve their financial situation in 2024.



Technology

Millennials embrace the possibilities of technology and expect to see its seamlessness and efficiency baked into all elements of their lives.



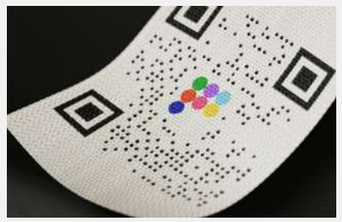
Health and Wellness

With increased focus on their mental and physical wellness, Millennials are looking for products and services that help them optimise their health.



Community and Identity

Millennials are redrawing the rules of parenthood, removing the taboo of having no kids, while upping the ante for those who do.



Sustainability

Millennials' quest to do their bit in the name of sustainability starts at home as they prioritise reducing the impact of their consumption habits.

SUCCESS AND ACHIEVEMENT



Finance: Positive Movers

Faced with continued concerns about the cost of living crisis, Millennials are looking for ways to proactively improve their financial situation in 2024.

US data from Ameriprise Financial 2023 suggests that Millennials are more reliant on help from previous generations, with 41% revealing that they expect to rely on family for future financial needs and more than half (56%) saying they feel under pressure to balance their multiple priorities. The cost of living is their top concern, with 42% ranking it among their top three worries for 2023, up six percentage points on 2022 (source: Deloitte's Gen Z and Millennial Survey).

Despite these financial impediments, there are signs that Millennials are focused on taking active steps to improve their financial situation this year. A US survey from Fidelity Investments shows that Millennials are now looking to take charge of their finances, with 76% saying they are considering financial resolutions for 2024, compared with 66% of all respondents and just 53% of Baby Boomers.

Research shows that these attempts to boost their financial situation are already under way, with Millennials looking for new ways to bring in money and rethink their shopping behaviour. Deloitte reports that 37% of Millennials have taken on either a part-time or full-time paying job in addition to their primary job to improve their finances, while GfK's A fresh look at Gen Z and Millennials report suggests that, compared to the average consumer, they are more likely to postpone purchase until sale, swap down from branded goods and buy second-hand.



Left to right: Photography by Tatiana Syrikova; State of Mind campaign by Neiman Marcus, US

54% of US Millennials say one of their top three money goals for 2024 is 'increasing my income'

Source: Ameriprise Financial

Case Studies

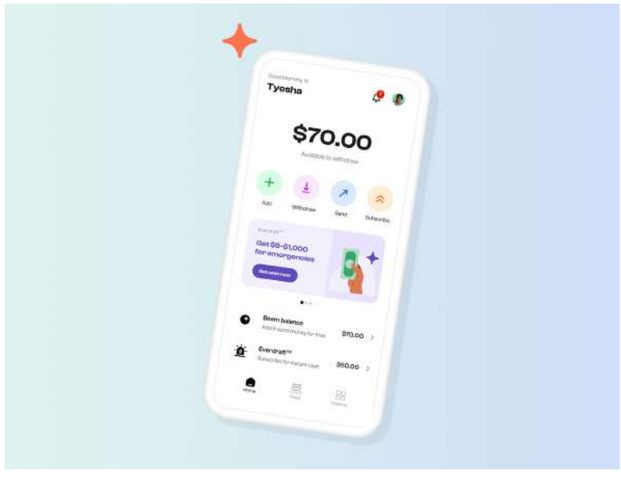
Piñata Pay

Piñata Pay is a fintech company launched in August 2023 designed to incentivise Generation Rent to prioritise meeting their financial commitments. The app enables users to track the payment schedule for their rent and receive cashback rewards and other benefits when they pay on time. Rewards known as Piñata Cash can be used with brands including Starbucks and Sephora.



Beem

US start-up Beem gives users access to short-term emergency loans without interest or credit checks. Customers pay a monthly fee to access the service and increase the value of loans available each time they pay back what they owe. It aims to help Millennials balance their financial priorities by giving them access to money when they need it, rather than when paid.



Left to right: Piñata Pay, US; Beem, US

Millennials make up **35%** of the US workforce and will represent **75%** of the global workforce by 2025

Source: TeamStage



Zoom app on Apple Vision Pro, US

Work: Work-flex

Millennials view flexible working as non-negotiable as they strive for better work-life balance and prioritise their mental health.

As the world continues to embrace flexible working patterns in the post-Covid era, Millennials are driving the agenda more than any other generation. More than three quarters (76%) now expect flexible working options as standard (source: **LiveCareer** and **Oyster Generational** Work Survey 2022). While most generations agree on this, Millennials are the most vociferous in their support.

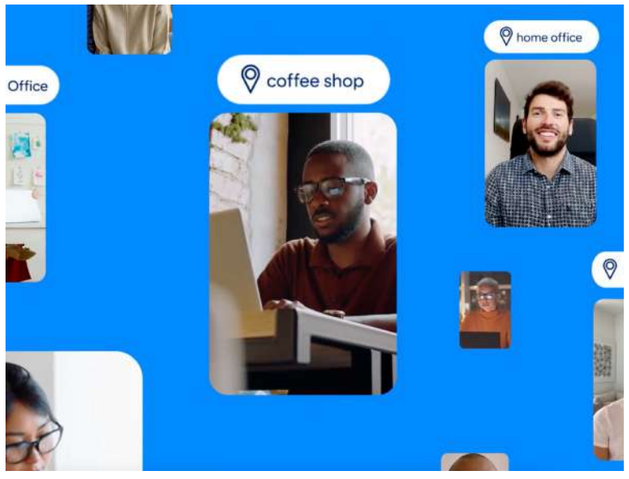
Deloitte's Gen Z and Millennial study reveals that the reason for this is their focus on achieving optimum work-life balance. The majority (62%) of Millennials agreed that, while work is central to their identity, better work-life balance is something they strive for. Just 16% of Millennials want to be fully remote workers, while 59% believe hybrid working is positive for their mental health. A further 27% say it helps them save money.

Businesses are meeting these flexibility demands with the launch of new working models. Despite this, Millennial work expert Elisabeth Kelan, professor of leadership and organisation at Essex Business School, University of Essex, cautions that Millennials are not only interested in flexibility and working on their own terms. 'Millennials do not expect jobs for life and are often said to be job-hoppers. However, one of the things they value is a stable and secure job, largely because they are hard to come by,' she says. This underpins the need for employers to offer their Millennial workers a sense of long-term security as well as elements of autonomy over how and where they work.

Case Studies

Pinterest’s PinFlex

Image-sharing social media platform Pinterest launched a new hybrid working model in 2023 designed to give maximum flexibility and autonomy to its employees. The PinFlex scheme gives US workers permission to live anywhere in the country. Rather than delivering a blanket return to the office mandate, PinFlex empowers individual teams to decide for themselves when their work dictates that an in-person office day is necessary.

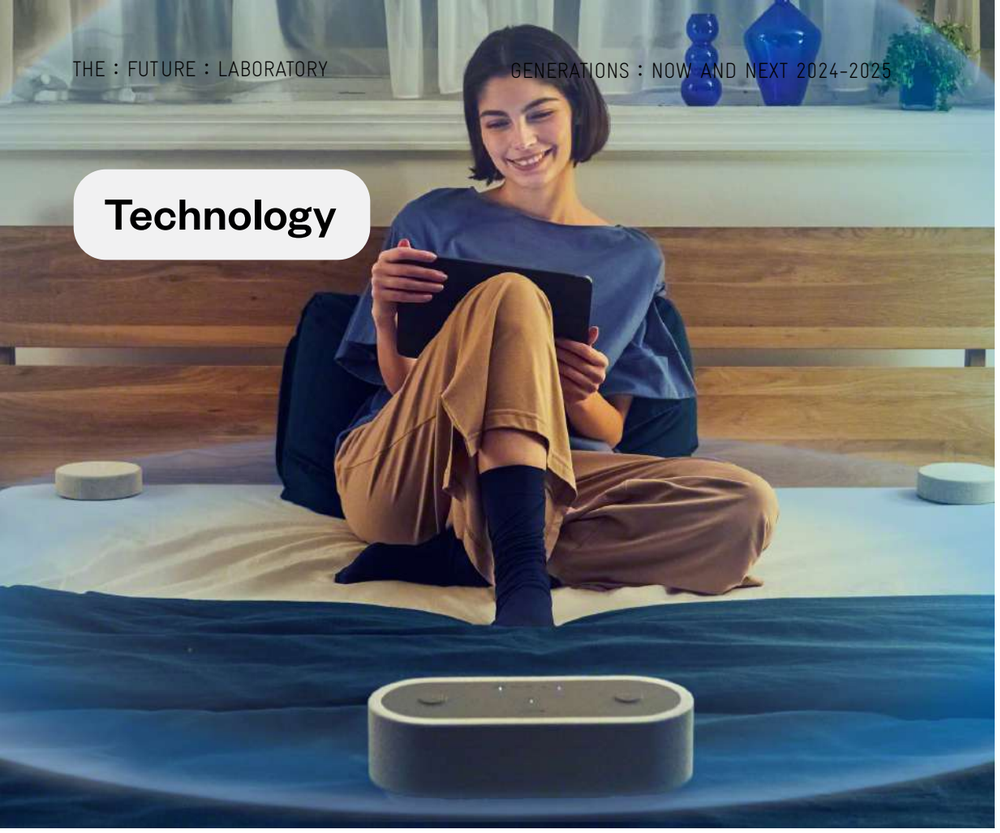


Bank of Ireland hybrid hubs

The Bank of Ireland has built a network of 16 co-working locations throughout Ireland to provide its hybrid employees with an alternative to working from home or in its central office locations. The latest co-working hub opened in Douglas, Cork, in February 2024, and provides desk and meeting room space for 36 workers. A Bank of Ireland survey last year found that 85% of workers feel that the hybrid working model supports work-life balance.



Left to right: Pinterest PinFlex, US; Photography by Mikhail Nilov, US



Technology

Left to right: Sony HT-AX7; Pop-up Positive News Feed by Amy Sellers, UK

Digital Habits and Media: Tech Optimists

Millennials embrace the possibilities of technology and expect to see its seamlessness and efficiency baked into all elements of their lives.

Having been the original social media masters and smartphone-first since their teenage years or early 20s, Millennials fully embrace the role of technology in their lives and remain positive about its impact on the future.

As younger generations raise warning flags about the detrimental effect of social media on their self-esteem and attention spans, Millennial users tell a different story. Nearly half (49%) of this generation believe that social media has a positive impact on their mental health as they use social media platforms as key touchpoints for staying in touch with friends, watching videos and keeping up to date with current affairs (source: Deloitte). Indeed, 45% of US Millennials use social media as their main news source at least once a day, dwarfing the numbers who get their daily news from radio (18%), news websites (17%) and national newspapers (6%) (source: Statista).

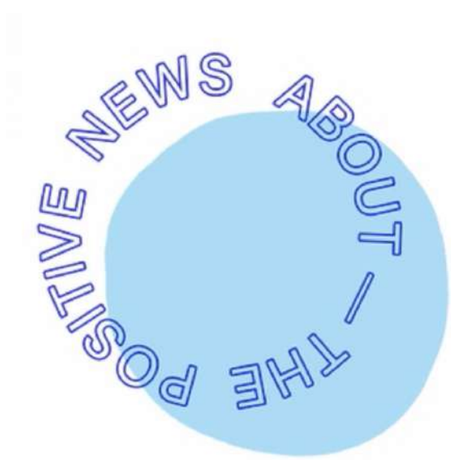
Millennials are also particularly bullish on the potential of new technology, with two-thirds (66%) believing it will have a positive impact on their careers (source: The Harris Poll). This includes having an optimistic outlook on the proliferation of AI, despite wider concerns in society about the existential threat it poses and its potential to replace human workers.

The AI Generational Gap Study by Aberdeen Strategy & Research found that 62% of Millennial workers and younger generations are optimistic about AI's impact on their line of work, a significantly higher number than among Gen X (45%) and Boomers (38%).

Having grown up with the seamlessness of technology at their fingertips, this optimism is now shaping Millennials' expectations of service provisions across all categories.

25% of Millennials said they would spend more on consumer electronics in 2023, including on phones, games and software, compared to **19%** of Gen Z and Gen X respondents, and **13%** of Baby Boomers

Source: ESW









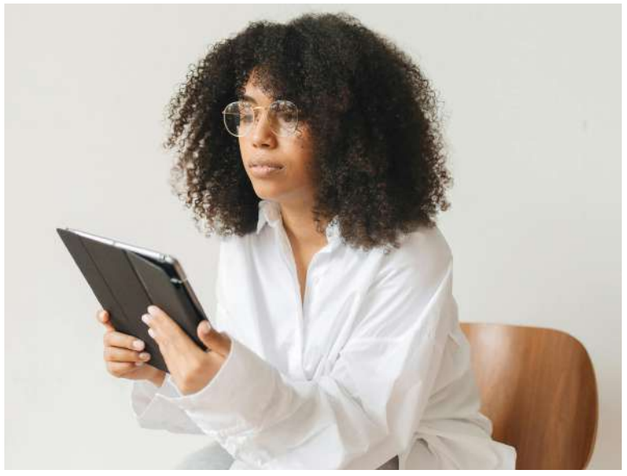




Case Studies

Nowly

Nowly is a Millennial-focused, digitally powered Canadian life insurance provider built on the premise that getting a new policy should be as easy and instantly gratifying as ordering a takeaway or getting a date. As such, it offers instant coverage based on a quick consultation, and gives all customers an annual £83 ($100, €93) Healthy Living rebate towards any health and wellness programme, app and gym membership.



CarePod

The CarePod AI-powered self-service doctors' offices are rolling out across the US in 2024, bring the digital-led frictionless expectations of Millennials to healthcare. Situated in high-footfall locations, initially in the San Francisco Bay Area, New York, Chicago and Philadelphia, they offer on-demand 24/7 access to advanced diagnostics and personalised health insights whenever they are needed.



Left to right: Nowly, Canada; CarePod, US

Health and Wellness

50% of US Millennials own a wearable device to track or monitor health

Source: Insider Intelligence

Moonbird, UK

Wellness: Wellness-boosters

With increased focus on their mental and physical wellness, Millennials are looking for products and services that help them optimise their health.

The digitally connected, always-on existence of Millennials, and their relentless social media-fuelled focus on improving every aspect of their lives, have resulted in higher levels of stress, anxiety and depression than the generations that preceded them (source: Business Insider). It also earned them the moniker The Burnout Generation.

Deloitte's Mental Health Deep Dive 2023 reveals that 73% of Millennials have concerns about their mental health, while 39% say they feel stressed or anxious all or most of the time. The Thriving Center of Psychology reports that more than one in four (28%) of US Millennials and younger adults saw their mental health decline in 2023 compared to 2022. It also reveals that 93% are hoping to improve their mental health in 2024, yet more than a fifth of these (22%) do not think this will be possible.

With The Thriving Center of Psychology's research also revealing that more than half (55%) of Millennials and Gen Z have gone to therapy, or are currently going to therapy, there is a clear recognition among this generation that things need to change, coupled with a proactive drive to make this change happen. This presents an opportunity for companies and brands in all categories to build transformative elements of health and wellness into product design and service provisions to support Millennials on this journey.

Case Studies

Sunnyside Mindful

Specifically addressing the spike in binge-drinking among Millennials in recent years, the Sunnyside Mindful drinking companion encourages users to drink in moderation via personalised goals, nudges, timely messages and access to expert coaches. Rather than supporting full abstinence from alcohol, Sunnyside embraces the 'damp' drinking approach of drinking fewer beverages in a more mindful way.



Moonbird

Moonbird is a hand-held breathing companion launched at CES 2024 that is said to be scientifically proven to reduce anxiety and improve sleep after as little as five minutes of slow breathing. Users hold the device in the palm of their hands and simply breathe along to the pattern it suggests in its tailored slow breathing sessions.



Left to right: Sunnyside mindful drinking app, US; Moonbird, UK



Left to right: Nike sports bras; Love Supreme Projects has created a virtual shared space in which music is combined with yoga, dance classes and other community-led activities. Branding by *Pentagram*, UK

Leisure: Positive Escapologists

Millennials are looking for escapist experiences that help them unwind and boost their mental health.

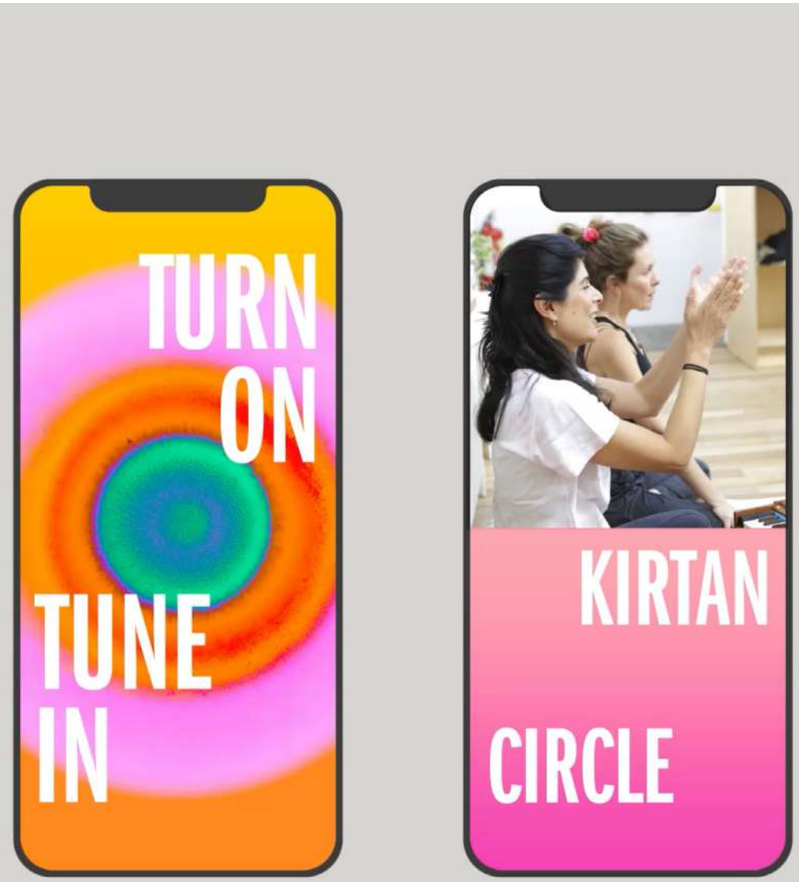
Y**Pulse's** Hobbies and Passions Behavioural Survey reveals that digital experiences dominate Millennials' everyday leisure activities, with listening to music, scrolling through social media, online shopping, gaming and watching films, tv and **YouTube** all featuring in the top 10. The Entertainment Software Association reports that 30% of the 155m gamers in the US are Millennials, while research from Deloitte finds that 72% of this generation believe digital entertainment like streaming services offers them positive escapism.

A 2023 survey by UK retailer **Argos** found that 81% of British Millennials still enjoy hobbies they loved as a kid, with 78% saying they are good for their wellbeing and more than half (51%) revealing they help them relax and destress. Mental wellbeing plays a big part in Millennials' leisure pursuits. According to **Deloitte**, Millennials believe that the top driver of positive mental health, acknowledged by 78% of this generation, is spending time with friends in real life. After this, 75% of Millennials believe physical exercise like yoga and running gives them the mental boost they need.

And the American Express 2023 Global Travel Trends Report suggests the need to unwind is now influencing Millennials' travel plans. It found that 60% of Gen Zers and Millennials go out of their way to book hotels that offer spa and wellness services.

54% of US Millennials use their free time to improve their health and wellness, compared to an average of **45%**

Source: Healthline Media



Case Studies

Marriott Bonvoy and Fortnite

In response to Fandom's Inside Gaming report, which found that Millennials are more likely to purchase brands that have investments in the gaming space, international hotel and hospitality brand Marriott Bonvoy launched a series of mini-games in Fortnite. Pairing Millennials' love of gaming with their desire for positive escapism, gamers took part in a series of challenges while exploring digital versions of Marriott's Millennial-focused destinations.



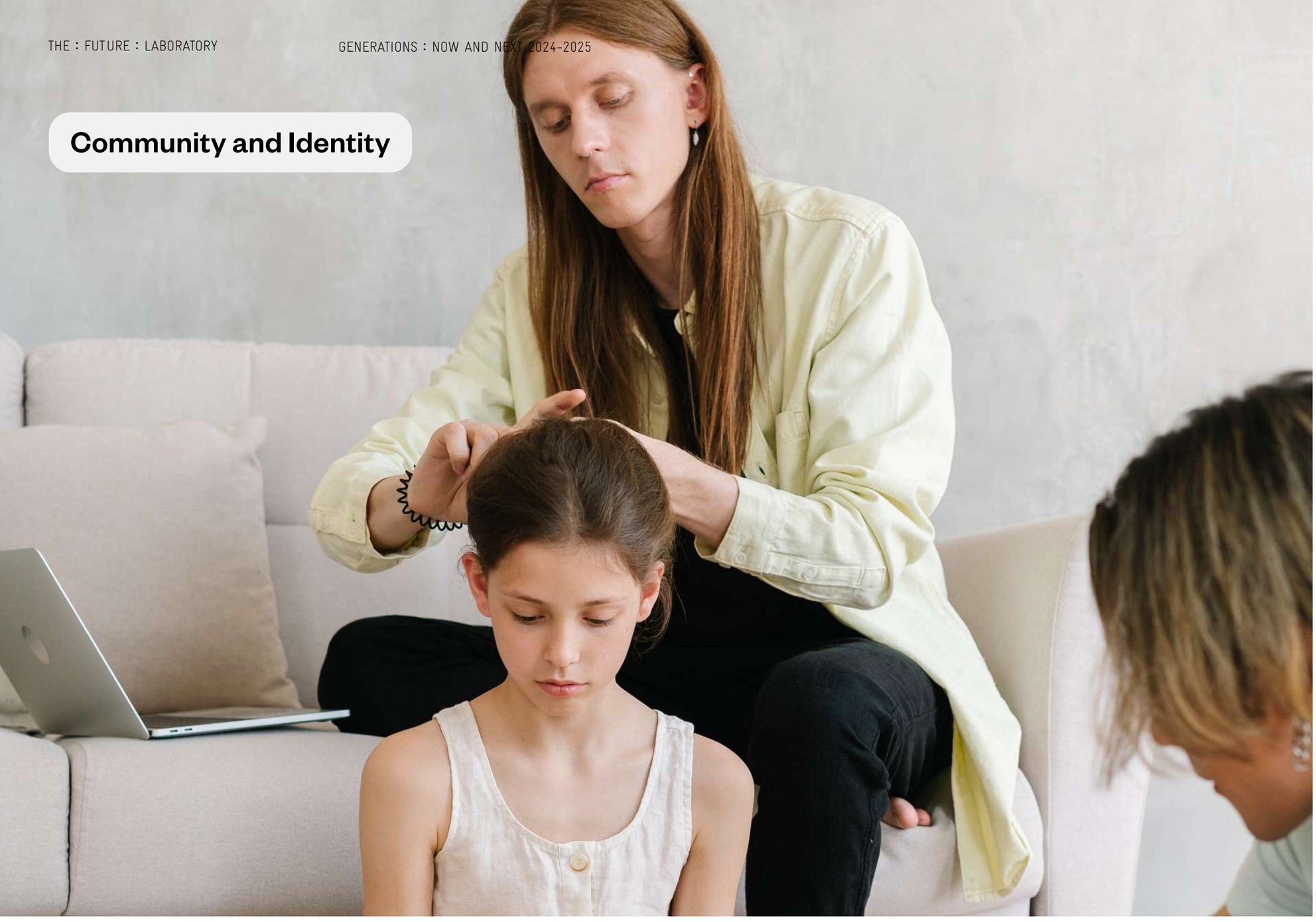
Lego Adult Nights

Legoland Discovery Centres across the UK have started hosting adult-only evening sessions to allow older Lego fans to unwind by taking part in themed building competitions. The no-kids-allowed events, which were launched initially in 2023, tap into the 'kidulting' trend of adults indulging in their childhood hobbies. At these Adult Nights, visitors can enjoy the Kingdom Quest laser ride, have fun in the brick pits and relax in the Lego 4D cinema.



Left to right: Marriott Bonvoy on Fortnite; Adult Lego Nights at Legoland Discovery Centres, UK

Community and Identity



Photography by Mikhail Nilov, US

By 2027, **83%** of parents with young children will be Millennials

Source: WARC

Relationships: Upskilled Parenting

Millennials are overseeing a rethink of parenthood, with more adults than ever choosing to remain childless, while those having kids are changing the focus of their parenting.

Data from Pew Research Center shows that 44% of childless adults in the US are unlikely to have children in future. This highlights the growing acceptance of not having children for financial, lifestyle and climate change reasons, and has led to a renaissance for DINKs, or couples with Double Income and No Kids.

But those Millennials deciding to have children are approaching parenthood with vigour. Research by London-based **Beano Studios** found that 87% of Millennial parents in the UK and the US view parenting as their most important job. Beano Studios also highlights a significant shift in the mindset of Millennial parents, compared to previous generations, with 81% believing it is more important for their children to be happy than to be successful.

This radically changes traditional views on education in favour of supporting children to be themselves and follow their own dreams. This research is backed up by the findings of a research panel by **Saatchi & Saatchi** and **NowWhat**, which revealed that US Millennial parents are focused on mental health and have replaced the pursuit of status with the quest for calmness both for themselves and their kids.

While companies and brands must recognise the varying life choices of Millennials, they have a key role to play in helping Millennial parents reach their goals.

Case Studies

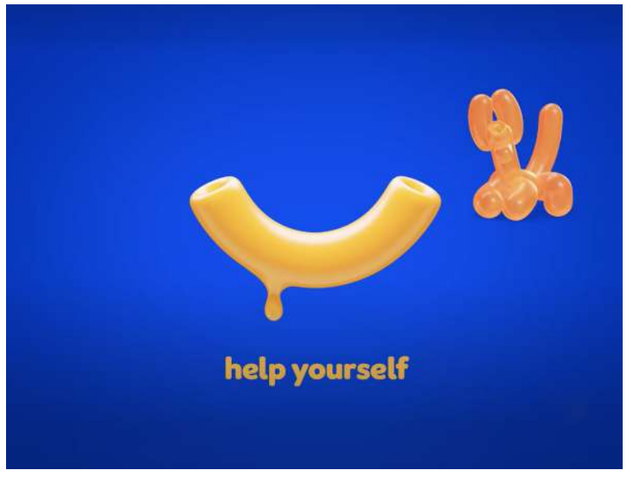
Gluxkind

Gluxkind's Rosa smart stroller, unveiled at CES 2024, is designed to meet the cutting-edge technology expectations of Millennials, while offering moments of respite for new parents. The pushchair includes the Rock-My-Baby feature that mimics the act of rocking a child, while playing white noise from in-built speakers to lull the baby to sleep as its parents rest or accomplish other tasks.



Kraft

Kraft's advertising in 2023 courted Millennial parents with nostalgic ads that position its Mac & Cheese bowls as a 'vehicle of transformation' during their hectic days. One instalment of its Help Yourself series features 6- and 15- second spots showing the product can be the catalyst for turning 'struggles' into 'snuggles', 'rush hour' into 'happy hours' and 'overworked' to 'werkin' it'.



Left to right: Rosa Smart Stroller by Glüxkind, Canada; Help Yourself campaign by Johannes Leonardo for Kraft, US

Individual: Eco-nesters

Millennials' quest to do their bit in the name of sustainability starts at home as they prioritise reducing the impact of their consumption habits.

Millennials overwhelmingly say they are willing to, and already are, doing their bit for the planet. According to the EY and JA Worldwide Generational Sustainability Survey 2023, 64% of this generation say they are either extremely or very willing to make changes in their daily life in the name of sustainability, second only to Gen X.

Indeed, 73% of Millennials polled for Deloitte's Gen Z and Millennial Survey 2023 said they are actively trying to minimise their impact on the environment. The most common way that Millennials say they are reducing their carbon footprint is by turning their backs on unsustainable brands, with 37% saying they now avoid fast fashion. A third of this generation claim that their quest to live more sustainably has changed their mobility habits. Some 33% say their climate concerns have stopped them from driving a car. Sustainability is also cited as a motivating factor in not having children, with 26% of Millennials saying the environment has influenced them to have fewer or no kids. Millennials have also shown more willingness than any other generation to make their home more sustainable, with 31% agreeing with that goal (source: EY and JA).

In line with these aims, companies have a key role to play in helping their Millennial consumers to understand and lessen the impact of their shopping behaviour.





Left to right: *Impulse* recently unveiled its battery-integrated home appliances encouraging people to move away from natural gases in favour of more sustainably generated and cost-efficient energy, developed in partnership with Blond and The Ad Hoc Group, US; Photography by CottonBro, Russia

82% of Millennials globally are interested in a holiday with minimal environmental impact

Source: American Express

Case Studies

Asket

Longevity-focused Swedish fashion brand Asket gives customers an Impact Receipt to lay out the true environmental impact of their purchases. The Impact Receipt is sent to each customer via email, detailing the CO2e emissions and water and energy consumption during the production of each of their items, as well as the impact of their packaging and shipping.



Pangaia ReWear

Millennial-focused sustainable fashion brand Pangaia also launched its circular ReWear platform where pre-loved items can be bought and sold. To make the experience as seamless as possible, each new item from the brand will have a QR code on the label, which can be scanned to instantly list the item for re-sale when customers no longer want it.



Left to right: Asket, Sweden; Pangaia ReWear, UK and Ireland

Sustainability



Left to right: Non-Nation by Alex Szwaj. Photography by *Femke Reijerman*, The Netherlands; Pangaia ReWear, UK and Ireland

64% of US Millennial parents say the environment has become a top concern now that they have kids

Source: Barkley

Societal: Eco-collectivists

Millennials believe that collective action backed at government level is the key to positive climate action.

While Millennials express a strong willingness to do their bit individually to fight climate change, they firmly believe that real progress needs to be driven at a government level.

Just 22% of Millennials believe that it is down to individuals to make the world more sustainable, the lowest amongst all generations. Nearly twice that number (44%) believe it is down to the government to bring about sustainable change - second only to Baby Boomers (source: EY and JA Worldwide Generational Sustainability Survey 2023).

Gen Z climate activists may receive the most column inches, but in the UK, two Millennials are working to reignite one of the biggest sustainability focused NGOs in the world as the first joint executive directors of **Greenpeace UK**. Areeba Hamid, the first woman and the first person of colour to lead the organisation, and Will McCallum took over from Baby Boomer John Sauven last year, tasked with re-engaging with the activist community to 'build a long-term campaign around climate justice.'

The optimism of the Millennial generation even stands firm in the face of the climate emergency with 57% of Millennials polled by **EY and JA Worldwide** saying they are at least somewhat hopeful for the future of the planet. While younger generations are taking up the mantle of climate change, this optimism, coupled with Millennials' resourcefulness in reimaging new ways of living, means the generation still has an important role to play in averting climate disaster.



Case Studies

Ganni Insetting

Millennial favourite Scandinavian fashion brand Ganni has made a stand against brands that position carbon offsetting as a sustainable practice. Addressing concerns that offsetting does nothing to discourage unsustainable practices, the brand has committed to a programme of insetting - reducing the carbon footprint of its production process - including converting its factories to solar power.



Doconomy 2030 Forecast

Sustainable fintech company Doconomy's 2030 Forecast campaign used out-of-home advertising to display real-time data about how far away its homeland of Sweden is from meeting its future eco-targets. The company, whose DO Black credit card comes with a carbon emissions limit, used the activation to pressurise the government into making meaningful changes towards achieving its 2030 targets.



Left to right: Ganni, Denmark; Doconomy 2030 Forecast, Sweden

Foresight

Here, we expand on speculative future scenarios to 2030. Building on the Insight section, Foresight delves into what's possible: new directions, divergences or developments. For Millennials, we explore how new forms of community and neo-hedonistic consumption habits will shape their 30s and 40s



Reconstructed Families

Millennials will continue to challenge traditional life paths and create new forms of community to serve their emerging family structures.



Neo-hedonist Spenders

Contrary to myths about their financial troubles, resilient and resourceful Millennials will power a new shift towards hedonistic spending.



Equity Agitators

A new, self-assured activist mentality amongst Millennial women will see them become equity champions in the workplace and beyond.



Left to right: Photography by Mikhail Nilov, US; Commune, France

Restructured Families

Millennials will continue to challenge traditional life paths and create new forms of community to serve their emerging family structures.

While previous generations of adults ascribed to the life paths set out by their elders, Millennials are leading the charge of younger generations to live, grow and make forms of community and family on their own terms.

For the first time, young adults are pushing back on traditional, nominated life paths and viewing them as options, not obligations. Research from the Thriving Center of Psychology shows this is how they're thinking about marriage, with 85% of US Millennials and older Gen Zers saying they don't think marriage is necessary for a committed and fulfilling relationship. A similar mindset is evident when it comes to children. The rapidly declining birth rates in the US and the UK reflect a new generation of adults choosing not to have kids for a multitude of reasons (sources: Pew Charitable Trusts, Office for National Statistics).

The knock-on effect of this in the coming years will be an increase of Millennials, both single and in couples, embracing new forms of community and found families based on a shared ethos of life. In France, for example, a company called **Commune** has started opening co-living spaces for single-parent families. While each family has their own private living space, they also have access to tutoring, babysitting, school transport, legal advice and tv streaming services, creating a new form of extended family unit that meets their specific needs.

Now is the time to reconsider how the products and services we create could be redesigned to better serve a variety of emerging family structures. Brands must understand that, unlike previous generations, Millennials in their adulthood are not a monolith going through the same life experiences and nominated paths. In the coming years it will become increasingly important to reflect this in the way we talk to Millennials, to show we understand and support their life choices, whatever they may be.

20% of Millennials say their goal in life is to be single without kids

Source: YPulse

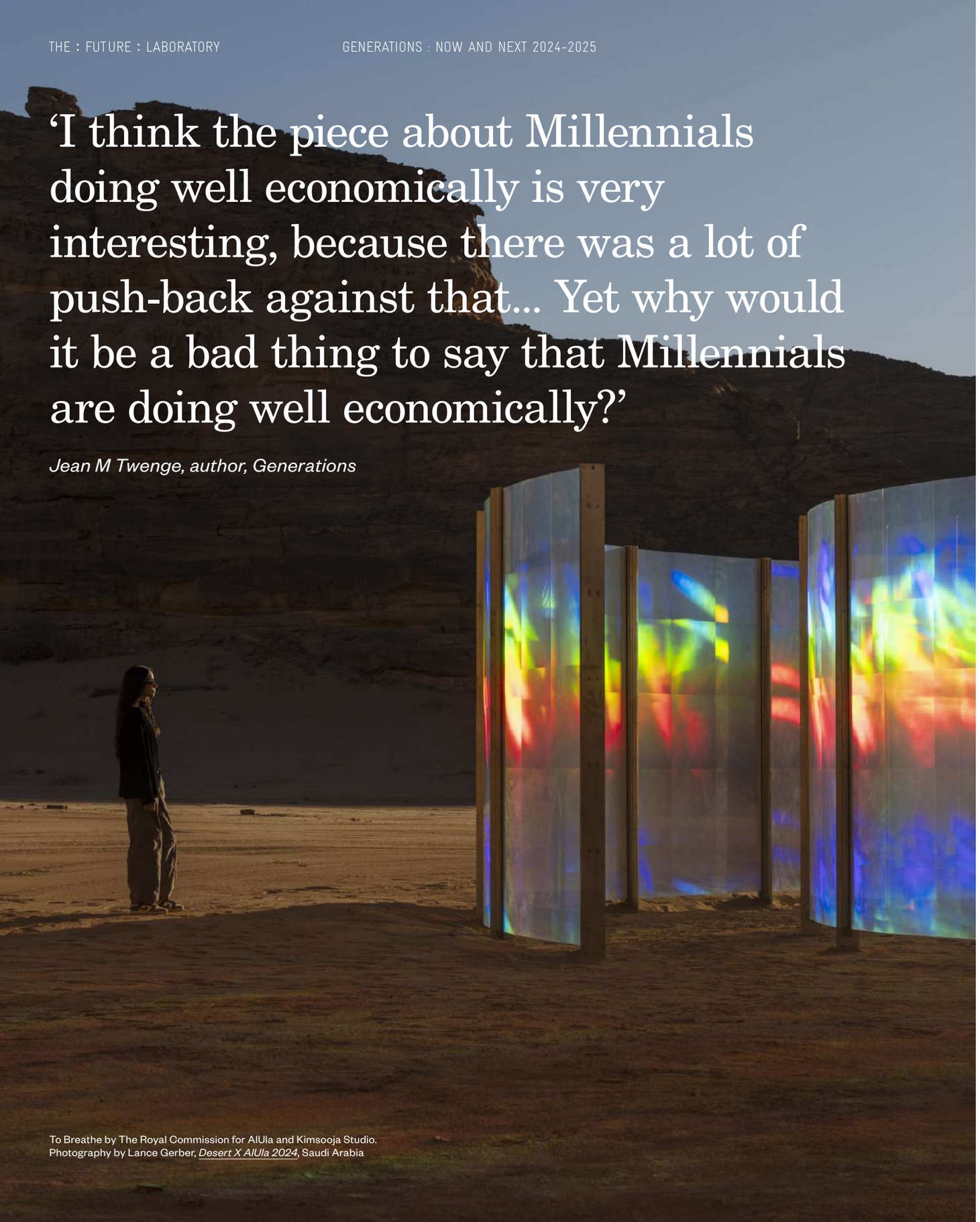
What is Foresight?

Foresights examine speculative scenarios 5–10 years in the future. Building on the Insight section, they showcase new directions, divergence or developments



‘I think the piece about Millennials doing well economically is very interesting, because there was a lot of push-back against that... Yet why would it be a bad thing to say that Millennials are doing well economically?’

Jean M Twenge, author, Generations



To Breathe by The Royal Commission for AlUla and Kimsooja Studio. Photography by Lance Gerber, *Desert X AlUla 2024*, Saudi Arabia

Neo-hedonist Spenders

Contrary to myths about their financial troubles, resilient and resourceful Millennials will power a new shift towards hedonistic spending.

Millennials are challenging long-held myths about their financial impotence and proving their spending power. Market insights from apartment rental website Rent Café based on data in the 2022 US census found that the majority of Millennials (52%) in America now own their own homes. And many are predicting their longer-term prospects look good too. The Vanguard Retirement Outlook suggests that the average Millennial is likely to generate sustainable retirement income equal to 58% of their pre-retirement earnings, which is eight percentage points more than the average median-income late Boomer.

As Millennials’ finances improve at a time when most of the generation still have another three decades of high earning capability ahead of retirement age, a new consumption mindset is emerging based around the prioritisation of once-in-a-lifetime experiences. More than half (60%) would prefer to spend money on life experiences than saving for retirement, a shift referred to as neo-hedonism (source: Diageo’s Distilled foresight report).

And even Millennials with smaller budgets are finding ways to splurge on the experiences they desire via financial dieting. The Trendex Millennial and Gen Z Summer Spotlight US survey found that 65% saved during the first half of the year to finance their summer activities, while 87% of respondents would be willing to spend more money on once-in-a-lifetime experiences. One in three Zillennials (a bridge cohort with Gen Z born in the 1990s) still lives at home, paying little or no rent, giving them the disposable income to splurge on key purchases (source: The ConnectedEconomy Meet The Zillennials report).

Millennials’ global spending power is now said to be £2 trillion ($2.5 trillion, €2.3 trillion) and they are expected to benefit more than any other generation from the Great Wealth Transfer from Baby Boomers (sources: ESW, Forbes). As their financial might and their appetite for aspirational lifestyles and bucket list experiences grow in the years ahead, they will transform into an increasingly important and influential consumer group.

Equity Agitators

A new, self-assured activist mentality among Millennial women will see them become equity champions in the workplace and beyond.

Millennial women have made strong gains in education and the workplace. They are the first US generation in which women are more educated than men, with 43.6% gaining a college degree, while the gender pay gap in the US has reduced significantly since they entered the workforce (source: **Population Reference Bureau**).

Progress has been made, but gender inequality still proliferates. Professor Elisabeth Kelan, the author of Rising Stars: Developing Millennial Women as Leaders, tells LS:N Global that, in the past, Millennial women have tried to ignore inequality. 'When Millennial women were younger, they did not anticipate that gender inequality would impact their lives. They thought it was something that had been solved. They worked very hard to ignore gender inequality in their own experience.'

But a new, more activist, mentality is emerging among Millennial women that will lead them to fight for true equity in the workplace and beyond in the coming years. The Great Place To Work® employee survey of 300,000 workers found that Millennials are more likely than any other generation to cite gender equity as a top concern. And in recent years Millennial women have become more likely to ask for pay rises than any previous generations (source: YPulse).

With Millennials predicted to make up 70% of the UK workforce by the end of the decade, this same confidence and ambition will be used to make them equity champions as they rise into positions of power (source: **French Chamber of Great Britain**). 'Millennials are stepping into those leadership roles with a lot more ambition and interest than Gen X had,' Dr Jean Twenge, professor of psychology at San Diego State University, tells LS:N Global.

This determination is echoed in the emerging Age of Millenopause, as the oldest members of the generation are starting to experience perimenopause and menopause, and are demanding that their needs are seen, heard and serviced. Millennials, and particularly Millennial women, may be experiencing some of the same hardships as previous generations, but their focus, drive and entitlement will force employers and brands to deliver substantial and meaningful change.





Left to right: Fu£k the Pay Gap by *Anna Douglas*, UK; Photography by Liza Summer

'Power is going to go, not from Boomers to Gen X, but from Boomers directly to Millennials'

Jean M Twenge

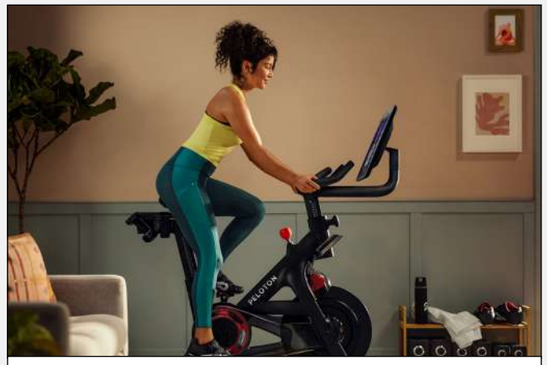
Strategic Implications

Our Strategic Implications are actions and future considerations for brands and businesses to contemplate



Faces of Travel by Delta Air Lines and Adobe, US

Strategic Actions



Prioritise their mental health

In the face of significant depression, stress and anxiety levels, it is imperative to find ways that your brand can enhance the mental wellness of your Millennial consumers.



Encourage positive money moves

As Millennials make a concerted effort to get a grip of their finances this year, brands can prosper by helping them achieve their proactive money goals.



Embrace divergent life choices

Recognise that Millennials are not a monolith going through the same nominated paths. Find ways to focus on purpose and changing life choices, no matter what the life stage.

Left to right: Peloton; Ikea Buy Now Pay Later; Photography by CottonBro, Russia

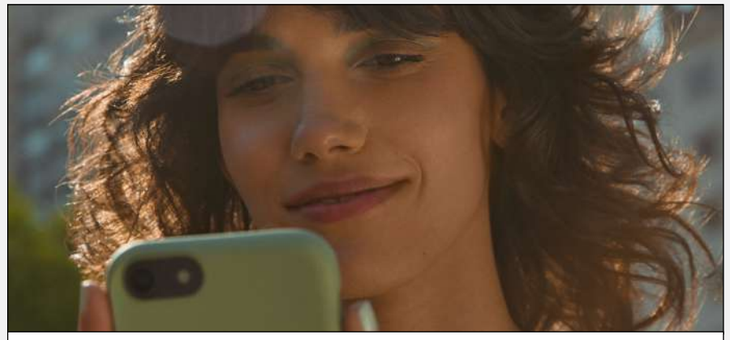
Thought-starters



Given the way Millennials mix saving and spending, how can you update your products and services to make them worth splurging on?



How can you provide your Millennial customers with opportunities to experience the positive escapism they crave in their leisure time?



How can you take inspiration from Millennials' positivity towards technology to add extra seamlessness and personalisation to your propositions?

Left to right: Wise. Identity by Ragged Edge, UK; Faces of Travel by Delta Air Lines and Adobe, US; PicPay. Brand imagery by *Maltchique*, Brazil



Photography by Yan Krukau, Thailand

Born 1997–2012

Gen Z
Now and Next

From *Vision* to *Contradiction*

Gen Z are stepping into adulthood carrying the weight of the world on their shoulders. Without the tools or role models to help them enact the change they want to see, they find themselves paralysed by paradox



At a glance

: Born between 1997 and 2012, Gen Z's coming of age has coincided with climate catastrophe, political upheaval and a global pandemic

: Burdened with infobesity, daily doom and a responsibility to save the planet, they find themselves paralysed by cognitive dissonance

: This lack of agency has met with economic turmoil to make the traditional markers of adulthood – home-ownership, parenthood, financial security – seem unattainable

: A life spent using technology has left Gen Z unable to switch off, hyper-connected online but lonely in real life and looking for sources of community and connection

: As Gen Z set to overtake Baby Boomers in the full-time workforce, a second wave of rethinking workplace culture could be just around the corner

Photography by Mart Production, Russia

Born between 1997 and 2012, Gen Z's coming of age has coincided with climate catastrophe, political upheaval and a global pandemic. Burdened with the responsibility to provide solutions to the polycrisis they've inherited, these young people are navigating a rocky path to adulthood.

Gen Z want to change the world for the better, but they were never given the tools or the role models to make this happen. Pulled in so many directions and inundated with more information than any generation before them, they find themselves paralysed by cognitive dissonance: they eschew religion but seek community and spirituality; are tech-savvy but addicted to social media; are hyper-connected online but lonely in real life; and are eco-conscious consumers who keep falling for fast fashion.

Five years ago, this was a generation energised and empowered by Greta Thunberg and Fridays for Future – the youth of today saving the world of tomorrow. But as news of wildfires, droughts and extreme weather has consistently met with empty promises from governments and evasion by big corporations, the adrenaline has worn off.

Where young people once felt inspired to take control of their future, a lack of agency and a sense of burnout has followed, exacerbated by the pandemic and cost of living crisis. Yet this shadow of responsibility continues to follow Gen Z as they enter the workforce and attempt to navigate a world filled with technology, so remarkedly different from the one their parents were born into. The result is a generation defined by paradox.

At the end of 2020, the year of the pandemic, **73%** of Gen Z said that older generations can't act as guides to adulthood because too much has changed in the world

Source: Spotify

Drivers

Ascending into adolescence and adulthood, Gen Z face a complex landscape of climate catastrophe, pandemic afterquakes, information overload and tech-driven loneliness



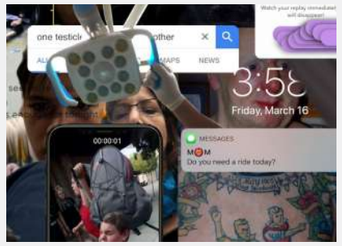
Infobesity

In less than three decades Gen Z have taken in a lifetime of information; this has left them feeling anxious and immobilised.



Delayed Adulthood

The pandemic stole two years of their adolescence. As a result, the transition to adulthood has been put on pause.



Toxic Technologies

Gen Z face challenges navigating excessive screen time, the impact of social media on mental wellbeing and a susceptibility to fake news.



E-solation

Gen Z are experiencing loneliness at alarming rates and looking for offline connections and community wherever they can find it.

Infobesity

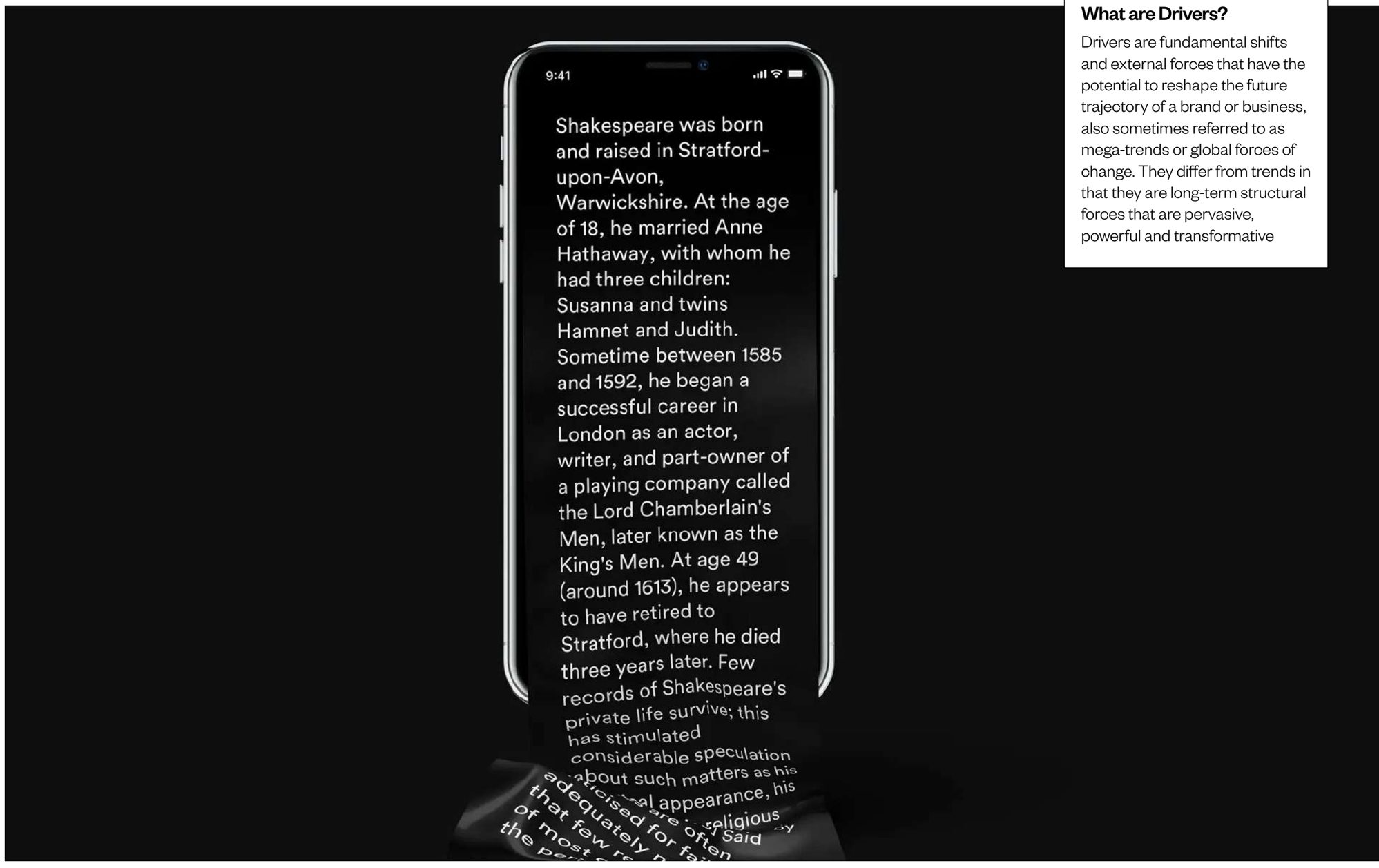
With great knowledge comes great responsibility, and in less than three decades Gen Z have taken in a lifetime of information; this has left them feeling anxious and immobilised.

From **Nintendo** Wiis to iPhone 15s, technology is growing up even faster than Gen Z. Most of this cohort won't remember a time without super-connected internet or unabridged access to **Google**. Amid wars playing out on **TikTok** and instant news notifications for every natural disaster around the world, doomscrolling, doom dressing, and doomed thinking have become part of Gen Z's everyday lives.

'Growing up being constantly overstimulated and exposed to large amounts of information is the worst part of being Gen Z,' says Erifili Gounari, founder of Gen Z marketing consultancy The Z Link. 'It's led to a lot of issues around how we get our dopamine, how we live day to day and how we disconnect.'

Almost two-thirds (65%) of Gen Z self-reported as struggling with at least one mental health issue between 2020 and 2022, according to Oliver Wyman, while a 2021 study of 16–25-year-olds found that more than 50% feel sad, anxious, angry, powerless, helpless and guilty about climate change. Just under half say their feelings about climate change negatively affect their daily life and functioning (source: University of Bath).

Activism cannot exist without optimism and this weight of responsibility has immobilised Gen Z, replacing proactivity with paralysis as they try to create a better future.



iPhone Long Scroll by *LS Graphics*

What are Drivers?

Drivers are fundamental shifts and external forces that have the potential to reshape the future trajectory of a brand or business, also sometimes referred to as mega-trends or global forces of change. They differ from trends in that they are long-term structural forces that are pervasive, powerful and transformative

45% of Gen Z say their feelings about climate change negatively affect their daily life and functioning

Source: University of Bath



Left to right: Pizza Hut's £5.50 ($7, €6.40) Deal Lover's campaign taps into the viral concept of Girl Math, in which women justify their spending habits with discounts or refunds. Campaign by RQ Agency, US; Photography by CottonBro, Russia

31% of Gen Z in the US live with a parent or a family member because they can't afford to live alone

Source: Intuit

Delayed Adulthood

The pandemic disrupted their studies, moved them back into their parents' houses and stole two important years of their adolescence. As a result, the transition to adulthood has been put on pause.

In the US, 31% of Gen Z live with a parent or a family member because they can't afford to live alone, leading them to be known as the Boomerang Generation (source: Intuit). The UK paints a similar picture: 40% of citizens aged 15–34 lived with their parents as of 2022 (source: Statista).

From girl maths to girl dinners and lazy girl jobs, this shift towards delayed adulthood has manifested in popular culture too. Sales of soft toys – such as Squishmallows and Jellycat – are seeing a spike among adult consumers. Kidults (aged 12 or above) are responsible for some £7.1bn ($9bn, €8.3bn) in toy sales annually and, post-Covid, are the toy industry's biggest driver of growth (source: NPD Group). Childhood characters such as **Hello Kitty** and **Moomin** have recently seen revivals in popularity, to the point that in early 2024 an exhibition titled Cute showed at **Somerset House** in London exploring 'the irresistible force of cuteness in contemporary culture'.

With just under half (48%) of 11–16-year-old girls believing 'it'll be harder for them to get a job when they leave education than it was for young people five years ago', Gen Z are leaning into the naivete of adolescence as a defence mechanism against the tough realities of our fractious world (source: Girlguiding).



Girls Just Wanna Grow Plants by Jas Nadoo and Georgette Fischer for *The Agency for Nature* targets the pressures felt by young women to be constantly on the grind, and promotes a slow life in nature, UK



Left to right: Going Online by *Andrea Horváthová* depicts the physical effort of going online to make users think about their consumption and creation of content. Photography by *Femke Reijerman,* The Netherlands; Pocket by Zach Wechter and Mishka Kornai, US

Toxic Technologies

Despite being digital natives, Gen Z face challenges navigating excessive screen time, the impact of social media on mental wellbeing and a surprising susceptibility to fake news.

Gen Z might laugh at Boomers struggling to switch off their iPhone torches, but being digital natives doesn't equate to a healthy relationship with technology.

On average, Gen Z received their first smartphone around age 12 (source: YPulse). They have an average mobile screen time of seven hours per day – 104% higher than the global average – and spend at least four hours a day on social media (sources: DCDX, Morning Consult). As algorithms upgrade, social media platforms have slowly become more addictive and young people are finding it harder and harder to put down their phones.

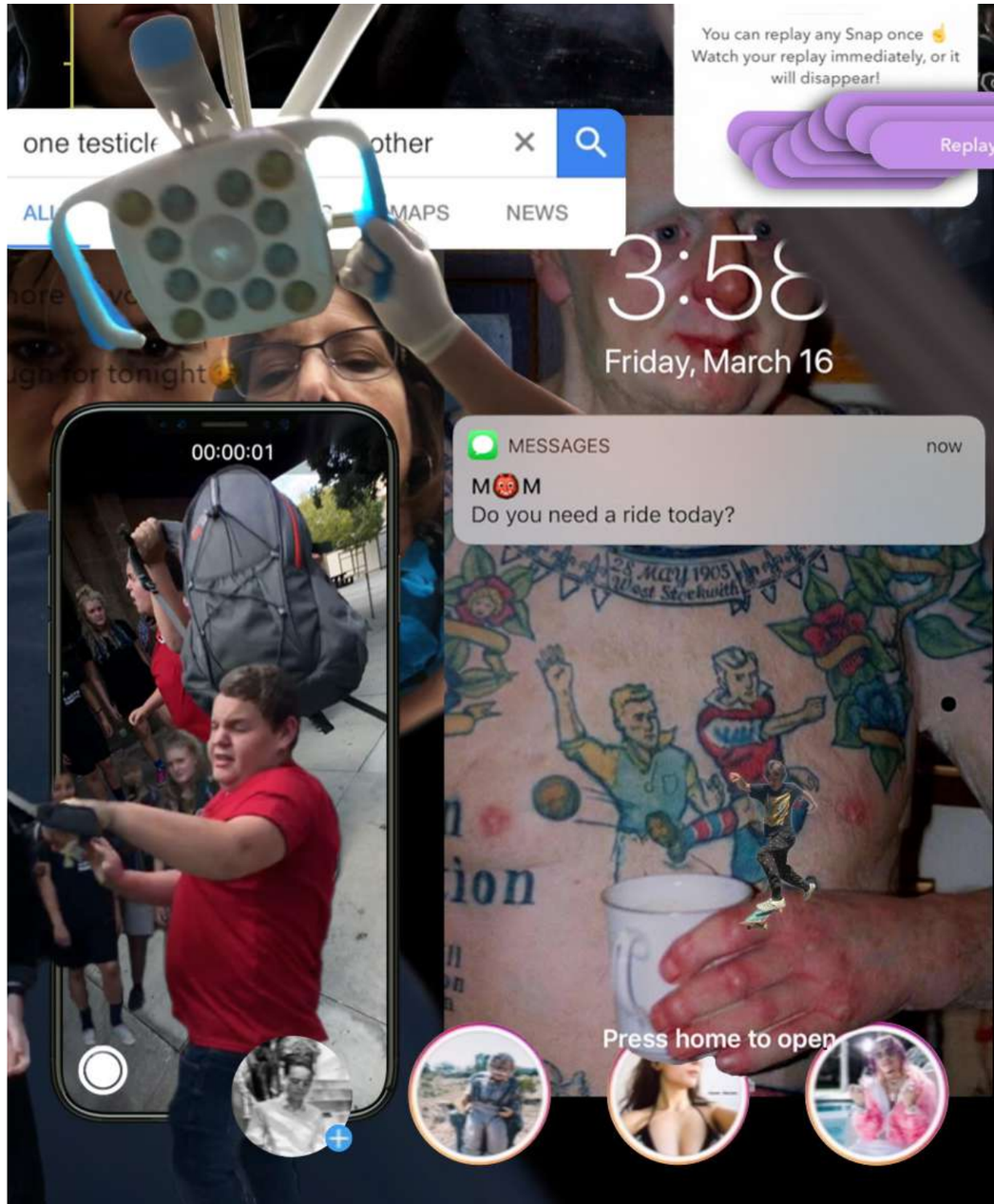
Spending excessive amounts of time on social media has been found to have a negative correlation with identifying fake news, surprisingly placing Gen Z at risk of consuming and believing misinformation (source: Center for Countering Digital Hate).

From **Instagram** filters wreaking havoc on young women's self-esteem to young men falling down rabbit holes of misogynistic message boards, the internet has presented a miscellanea of safeguarding issues. The number of 13–21-year-olds receiving sexist comments online, for instance, has more than doubled since 2018 (source: Girlguiding).

As the world gears up for a 2024 filled with elections and further political unrest, Gen Z will be searching for brands that can help them reclaim the internet, avoid misinformation and take back control of technology.

In 2023, Gen Z had **104%** higher mobile screen time than the global average

Source: DCDX



‘Gen Z are getting quite savvy about how algorithms are dictating who they spend time with and becoming more open to this idea of organic possibility and meeting people in real life’

Zing Tsjeng, editor-in-chief, Vice

Revolt London’s Loneliness Kills campaign reveals the startling epidemic of loneliness, UK

E-solation

Despite being hyper-connected online, studies suggest Gen Z are experiencing loneliness at alarming rates.

A 2022 study by the charity Eden Project Communities found that 19% of 16–24-year-olds, ‘often’ or ‘always’ feel lonely – three times more people than in the 65–74 age group – while 41% of girls aged 11–21 often feel sad or depressed after spending time online (source: Girlguiding).

Social media is constantly evolving, and more people than ever use these platforms passively (scrolling but rarely posting), behaviour that has been previously linked with reduced wellbeing (source: Social Issues and Policy Review). As a result, the internet is becoming a space that seems to be increasingly dominated by sponsored content and brand deals, slowly shifting further away from the ‘social’ function of these intended social networks and resulting in a loss of digital third spaces for community and connection.

‘In the same way that Gen Z is the generation that grew up with **Amazon**, it’s also the generation that grew up with dating apps,’ says Zing Tsjeng, editor-in-chief of **Vice**. But dating apps have run dry for Gen Z, as a general sense of loneliness prevails, both romantically and platonically. Instead, they’re turning their attention to the real world and ‘getting quite savvy about how algorithms are dictating who they spend time with and becoming more open to this idea of organic possibility and meeting people in real life’, says Tsjeng.

As Gen Z increasingly seek intimacy and connection offline, they will be looking to brands to help them find it.

Insight

We assess the significant insights across each generation in relation to Success and Achievement, Technology, Health and Wellness, and Community and Identity



Success and Achievement

The cost of living crisis has taken its toll, resulting in a cohort that are hesitant to set up long-term goals, overwhelmed by personal finances and wishfully dreaming of home-ownership.



Technology

After years of having their attention held captive by their phone screens, Gen Z are seeking ways to get offline and navigate a more mindful relationship with technology.



Health and Wellness

Gen Z have better language, tools and understanding of their mental health than previous generations, yet face the brink of a mental health epidemic.



Community and Identity

When it comes to Gen Z relationships, gender norms are outdated and marriage is optional, yet loneliness runs rife and a worrying gender divergence is emerging.



Sustainability

Gen Z's paradoxical attitude is conspicuous in their eco-sensibilities - at the fore of their concerns. So why can't they stop buying fast fashion?



Finance: Financial Fretters

The cost of living crisis has taken its toll on Gen Z's optimism for the future, resulting in a cohort that are hesitant to set up long-term goals, overwhelmed by personal finances and wishfully dreaming of home-ownership.

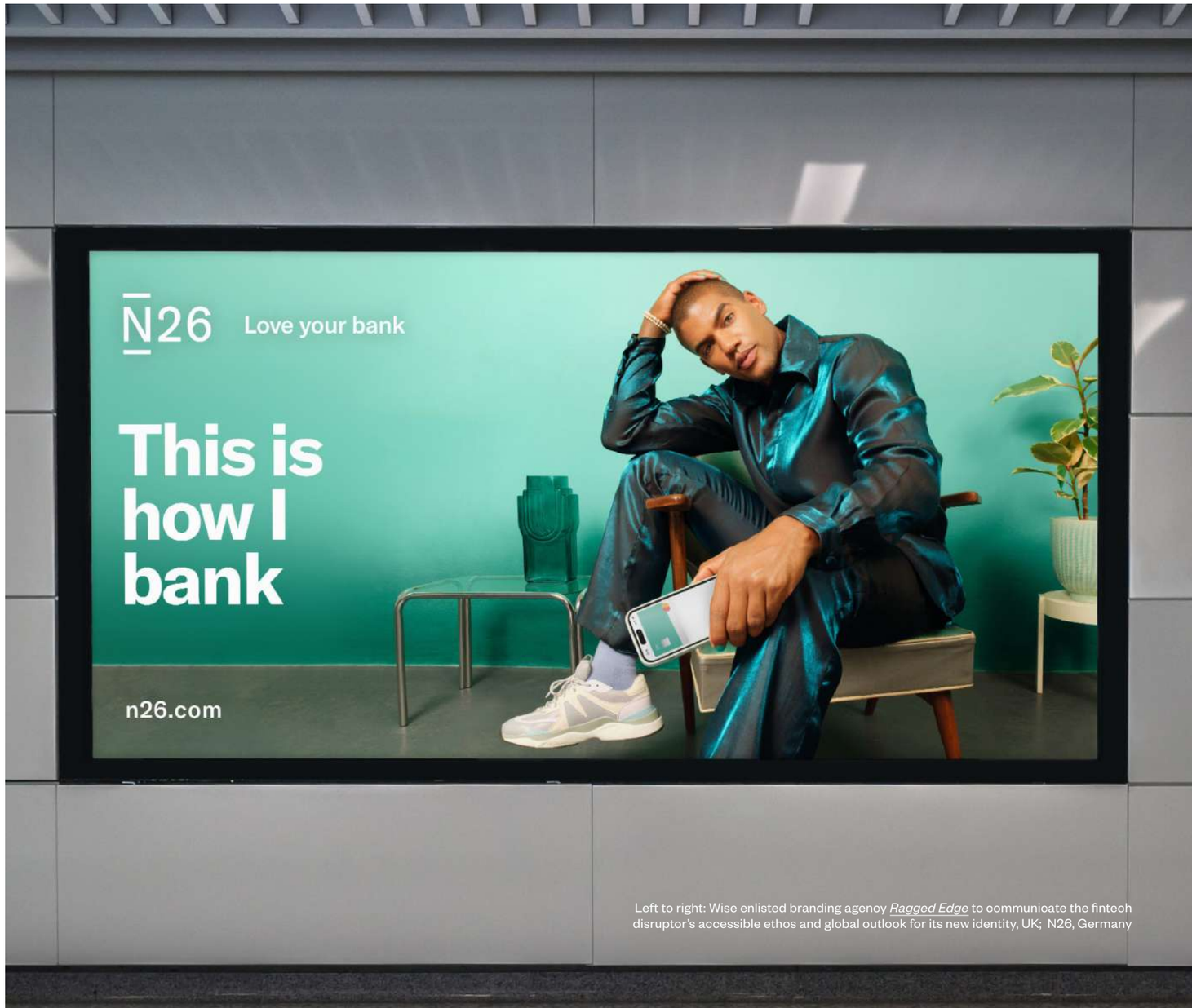
Half of Gen Z expect starting a family to become harder or impossible due to their finances, according to Deloitte, two in three say they're not sure they'll ever have the financial security to retire, and only 29% have confidence in their abilities to manage money, almost double that of the general population (source: Intuit).

But are their worries well-founded or a product of their anxious and volatile environments? In the UK, over half (60%) of Gen Z have savings, 14% have a mortgage and one-third have a pension by 26 (source: Ipsos). There's hope for home-ownership too: as of 2022, 30% of 25-year-olds in the US owned a home, compared to 27% of Gen X at the same age (source: RedFin).

At the same time, this tech-native generation have grown up with tools for money management such as digital saving pots and budget breakdowns via online banking apps and a wealth of 'financial influencers', using social media as a platform for free financial education. In the 'money-tok' sector of **TikTok** creators such as 'financial hot girl' Devamsha Gunput and Emma Edwards post videos translating financial jargon around investing, debt, savings and mortgages into Gen Z's language.

52% of Gen Z worry about their financial security and stability, more than double the percentage in older generations

Source: Oliver Wyman

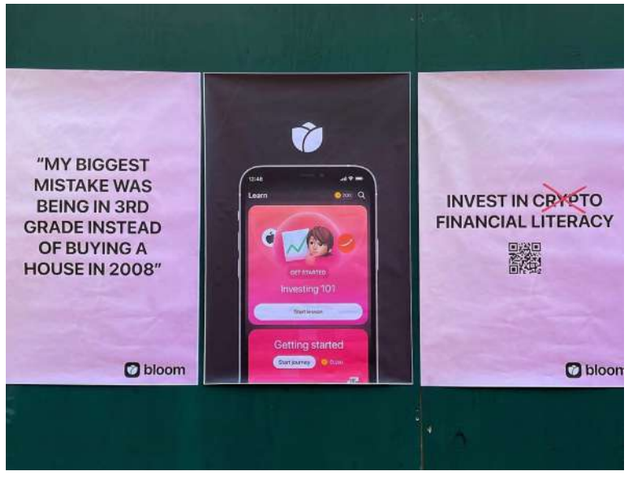


Left to right: Wise enlisted branding agency *Ragged Edge* to communicate the fintech disruptor's accessible ethos and global outlook for its new identity, UK; N26, Germany

Case Studies

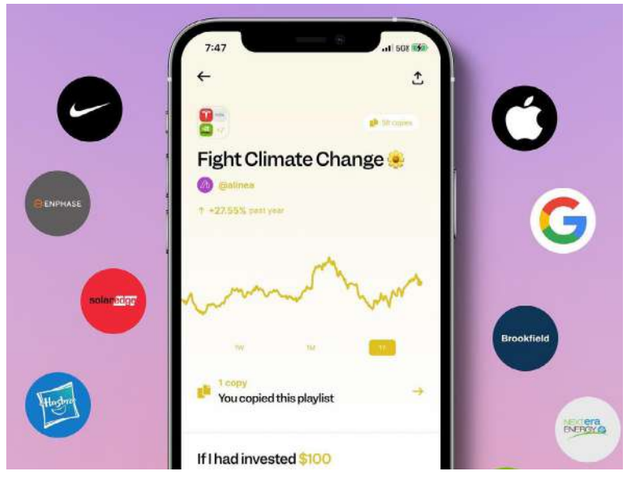
Bloom

Financial services are entering a new era as they evolve to appeal to Gen Z's tech-native and frugal nature. In July 2023, Bloom, a zero-commission stock investing app for ages 13+, reached 1m downloads a year after launching. Founded by Gen Z entrepreneurs Allan Maman and Sam Yang, the platform includes more than 200 financial lessons and stock rewards for learning, helping the next generation of Americans to build wealth.



Alinea

Alinea, an investment app and AI-driven personal wealth manager created by Gen Z for Gen Z, was launched in the US in March 2021, targeted at first-time investors. Users can create 'playlists' – as opposed to customised investment portfolios – bundling together collections of stocks around a particular theme, such as companies working to address climate change.



Monzo

In December 2023, online banking app Monzo released Year in Monzo 2023, an end-of-year campaign taking cues from Spotify Wrapped to provide users with a summary of their spending habits. The concept was launched in 2018, but upgraded for the 2023 iteration, with social-ready placards telling users if they were in the top percentile of spenders at vendors such as Greggs or McDonald's.



Left to right: Bloom, US; Alinea, US; Monzo, UK

What is Insight?

Insights explore the nascent consumer behaviours, attitudes and trend responses emerging today that will evolve or gain traction in the near future through to 2025. Insights help brands and businesses to understand and identify the opportunities presented by this trend

‘The whole idea of presenteeism, this idea that you have to turn up to the office to show your face and then people would know you’re working, I think that’s completely died with Gen Z’

Source: Zing Tsjeng, editor-in-chief, Vice

After Hours by Shauna Summers via DTS, Germany

Work: Polarising Professionals

Gen Z are something of an enigma in the workplace. To some, they are lazy, entitled and unprofessional, while to others they are entrepreneurial change-makers not afraid to challenge the status quo. Either way, by 2025, Gen Z will compromise 27% of the workforce (source: Oliver Wyman).

A large proportion of Gen Z have never experienced pre-pandemic office culture. To them, remote, flexible working is the norm, and they won’t be convinced otherwise, with 85% preferring hybrid or remote work environments (source: Oliver Wyman).

When this new-age thinking doesn’t compute with the corporate world, Gen Z aren’t afraid to take matters into their own hands. Almost half of Gen Z are engaged in work outside their employment (side hustles), while 64% of Gen Z in the UK have either started their own business or considered doing so (source: AAT).

Remote working made juggling several income streams possible, while social media and influencer culture have generated endless new ways to make money on the internet; 64% of Gen Z social media users planned to monetise a project in 2023 (source: Instagram). Thus, a side hustle economy has been born.

‘The idea of Gen Z being lazy or entitled doesn’t bear any resemblance to the Gen Zers that I work with,’ says Tsjeng. ‘But the whole idea of presenteeism, this idea that you have to turn up to the office to show your face and then people would know you’re working, I think that’s completely died with Gen Z.’

Case Studies

Contentful

Attracting the top Gen Z talent requires businesses to take Gen Z's way of working on board. Opening in 2022, software company Contentful's Berlin office was designed by T3 to feature multi-directional, adjustable lighting, automated sunshades, privacy booths, ergonomic workstations and interactive screens to support its workforce's diverse needs.



L'Oréal

When Beauty brand L'Oréal opened its US headquarters in Los Angeles in August 2022, it boasted an unusual perk. If workers attend the office at least three days a week, they can take advantage of a concierge service to help with errands such as collecting laundry or posting mail, for just £4 ($5, €4.57) per hour.



Left to right: Contentful, Germany; L'Oréal headquarters, US

Education: Disillusioned Students

Some 80% of Gen Z are set to complete higher education qualifications, in comparison to only 15% of Baby Boomers (source: Open Study College). Yet Gen Z's paradoxical nature is evident in their attitude to education. Rising tuition fees, crippling college debt and the inequalities highlighted by the 2019 US college admissions scandal have led to disillusionment with the schooling system.

A 2020 Spotify survey found that just under half (45%) of Gen Z in the UK considered an education plan other than a degree immediately following A levels, 46% of American Gen Z reportedly don't think college is worth the cost and 59% say they can still be successful without a four-year degree (sources: Business Insider, YouGov). Despite this, the global education market is projected to grow from £374bn ($477.1bn, €434.7bn) in 2022 to £668.7bn ($853.3bn, €777.6bn) by 2030 at a CAGR of 7.03% (source: Verified Market Research).

Rather than entirely rejecting higher education, Gen Z are looking to question the curriculum and demand more for their money. A 2019 poll by YouGov found that 26% of Gen Z feel the British empire is something to be ashamed of, versus 13% of over-65s; and only a fifth of UK universities have made genuine attempts to address the harmful legacy of colonialism (source: The Guardian).

Improved welfare services and environmental sustainability are also priorities for the students of today and tomorrow, with 45% of US university students having considered environmental sustainability in their university enrolment decision (source: Inside Higher Ed, College Pulse).





Left to right: T Levels offer British youth post-GCSE technical qualifications equivalent to three A Levels, UK; CoLab by Pearson Lloyd, UK

83% of US Gen Z say college education is 'very' or 'fairly' important

Source: Gallup and Walton Family Foundation

Case Studies

Pearson Lloyd

In July 2023, industrial design studio Pearson Lloyd partnered with office equipment supplier Senator to create CoLab, a range of furniture designed for next-generation learning. The hybrid furniture offers a range of seating and surfaces so students can sit, lean, perch or stand. The collection's easy adaptability enables agile group learning, makes space for laptop-based teamwork, can be adjusted for casual gatherings and is easy to repair or replace.



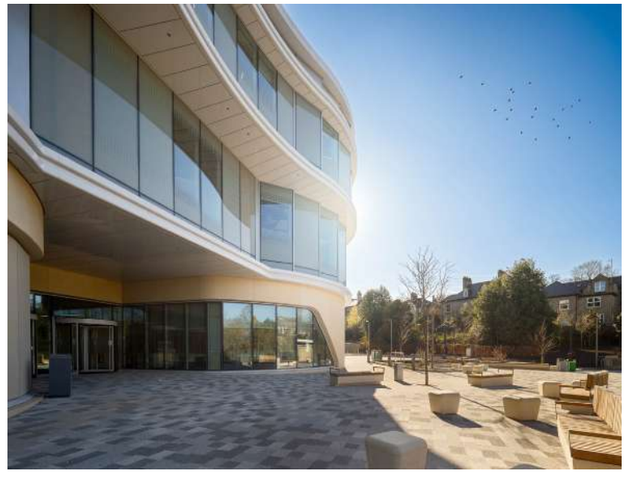
Georgia Tech

The Georgia Institute of Technology in Atlanta, US, is one institution meeting the demands of the students of today and tomorrow. Since 2021, the university has abided by eight dimensions of wellness for academic environments, adapted from work conducted by The Global Wellness Institute. In 2022, the university opened a Wellness Empowerment Center as a hub to educate, encourage and equip students to prioritise their health and wellness.



University of Sheffield

In November 2023, the University of Sheffield, UK, unveiled its first net-zero emissions building, The Wave. It uses ground-source heat pumps for heating and cooling and solar panels to generate electricity, while new landscaping and green spaces will boost local biodiversity. It is one of a number of new-era learning environments designed to meet the expectations of younger generations, both as students and faculty.



Left to right: CoLab by Pearson Lloyd, UK; The Georgia Institute of Technology, US; University of Sheffield, UK

Technology



Life's Best Angle campaign by *Maltchique* for Samsung, Brazil

Digital Habits: Tech Captives

After years of having their attention held captive by their phone screens, Gen Z are seeking ways to get offline and navigate a more mindful relationship with technology.

From iPhones to artificial intelligence, Gen Z have consistently embraced new technologies with open arms: 79% of British 13–17-year-olds already use generative AI tools and services (source: Ofcom); in the US, 92% use **YouTube**, 85% use **Instagram** and 78% use **TikTok** (source: Statista).

When 7,022 16–18-year-olds living in the UK were asked about social media usage as part of the Millennium Cohort study, however, 48% said they 'agreed' or 'strongly agreed' with the statement: 'I think I am addicted to social media' (source: Millennium Cohort).

With Gen Z averaging a mobile screen time of six hours and 41 minutes per day, research platform DCDX suggests 'tech captives' might be a more fitting label for Gen Z than 'tech natives'.

This captivation manifests in Gen Z being unable to switch off, even when they know it's affecting their mental health and wellbeing. Over two-thirds (67%) of girls say they sometimes feel ashamed of the way they look because they're not like the girls and women they see in the media and online (source: Girlguiding) and 32% of Gen Z admit to comparing themselves to people they see on social media, compared to 14% of the general population (source: Intuit).

As a result, Gen Z are increasingly seeking ways to get offline and navigate a more mindful relationship with technology: a 2023 study by website-building company Squarespace found that 50% of Gen Z would like to take a break from their phones. By contrast, only 20% of Baby Boomers want to do the same.

For Erifili Gounari, founder of Gen Z marketing consultancy The Z Link, however, this is a positive sign that the generation are beginning to evaluate their relationship with technology and are striving to create healthier habits.

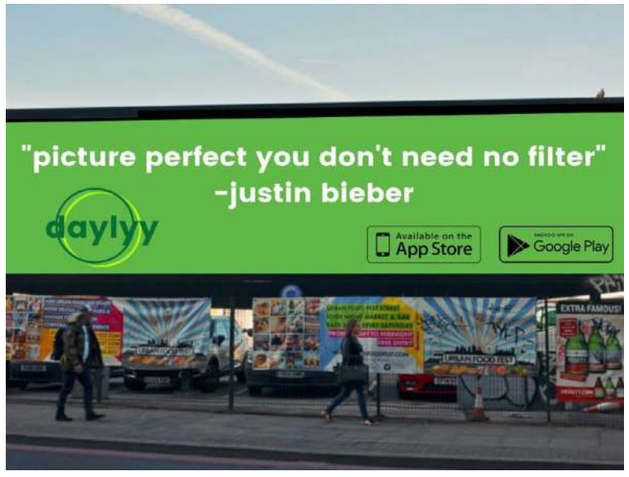
48% of surveyed **16–18-year-olds** said they 'agreed' or 'strongly agreed' with the statement: 'I think I am addicted to social media'

Source: Millennium Cohort

Case Studies

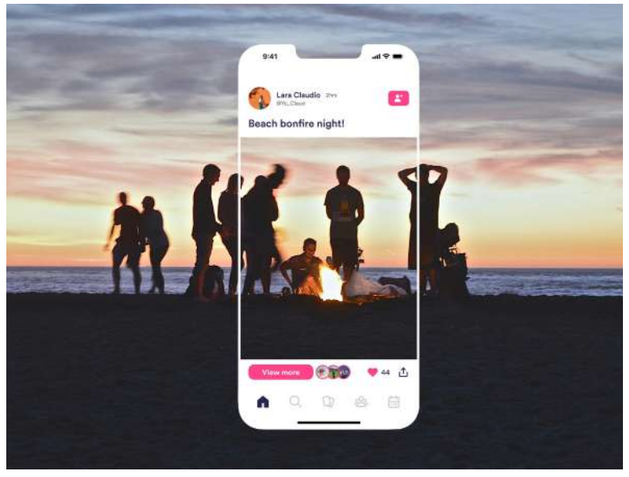
Daylyy

Photo-sharing app Daylyy was launched in 2022. Posited as ‘the opposite of current social media’, it requires photos to be taken in the app and instantly uploaded without filters or vanity metrics and no algorithm. It doesn’t allow comments to be posted on photos and all communication must be made through private messages to foster more personal connections.



Clyx

Gen Z are also looking to technology to help them find connections offline. Launched in 2022, Clyx recommends events in the local area, connects people and groups going to the same events with a dating app-style swipe feature, and allows users to organise their social calendars by sending requests to friends to attend events together.



LinkUp

In pre-reg phase, LinkUp aims to connect young people in new places such as university or while travelling. In relation to Gen Z, LinkUp says that we’re ‘beginning to see a shift towards developing more a mindful relationship with social media and a shift towards communities reclaiming the internet to make it more of an intentional space’.



Left to right: Daylyy, US; Clyx, UK; Link Up, UK



Left to right: Dazed Club app; The Verge has redesigned its website in a bid to revive the golden age of blogging through a new content strategy and user experience, US

Media: The New New News

As the world gears up for a 2024 jam-packed with elections (at least 64 countries plan to head to the polls in 2024), having trustworthy news sources and being armed with the skills to identify misinformation are more important than ever.

In recent years, the media landscape in the UK and the US has undergone seismic changes, but the transition from print to digital media to social-first has not been without its challenges.

A 2022 Statista survey found that half of Gen Z in the US report using social media as their daily news source, while only 5% say they read newspapers. **TikTok** has also become a popular news source for young people, with 20% of 18–24-year-olds using the platform for this purpose (source: Reuters Institute for the Study of Journalism).

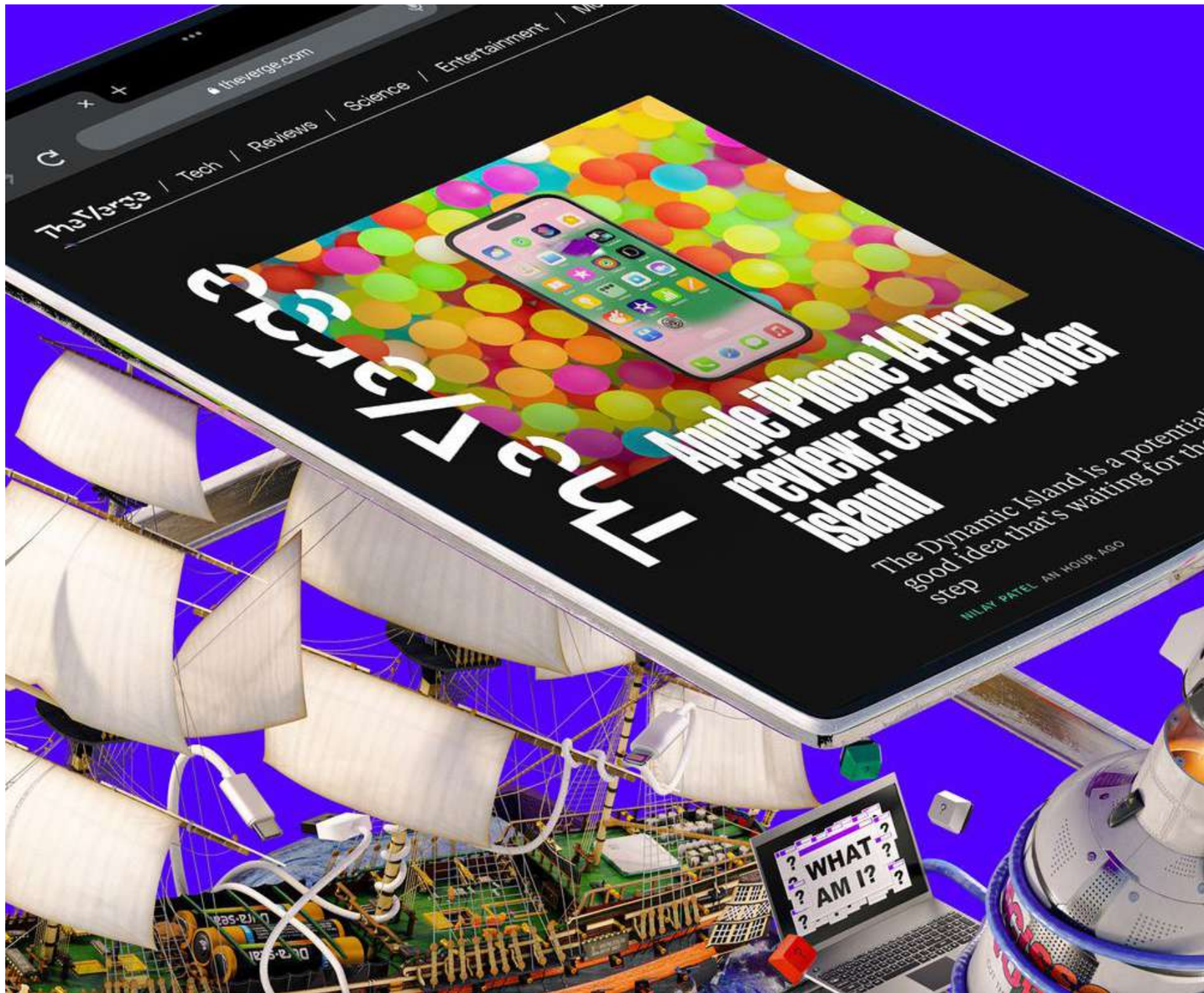
Findings from the Center for Countering Digital Hate, however, indicate a negative relationship between time spent on social media and identifying fake news: 60% of 13–17-year-old Americans surveyed agreed with four or more harmful conspiracy statements, compared with just 49% of adults. For teens who spend four or more hours on social media per day, this figure rose to 69%.

'I think the internet is going to become a very strange place by the end of 2024,' says Vice's editor-in-chief Zing Tsjeng, explaining that Gen Z's media habits could go one of two ways in the next few years. 'There's a chance that people will just get turned off by the absolute distrust floating around the internet and will decide to log off. But there's also every chance that even though they like to think of themselves as being savvy online, Gen Z will fall for the same kind of misinformation and disinformation, just packaged in a different way.'

Despite the obvious need for their content, traditional broadcasters often fail to break through on social media, looking out of place on apps such as TikTok that thrive on 'authenticity' and casual face-to-camera videos.

'I really don't buy the idea that Gen Z are not interested in news. It's just about publishers meeting them where they are and accepting that reading habits have changed'

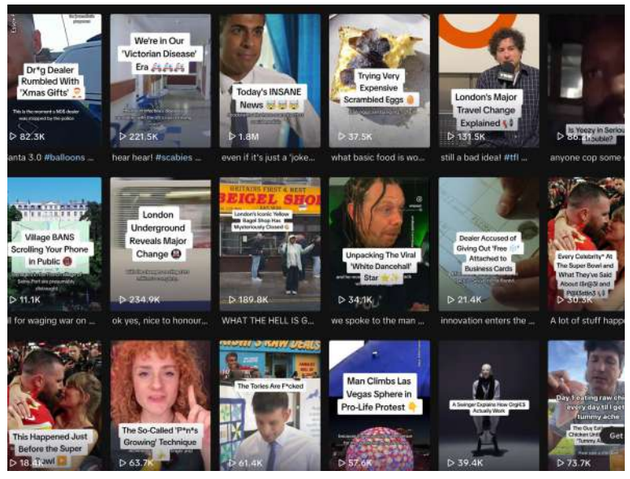
Zing Tsjeng, editor-in-chief, Vice



Case Studies

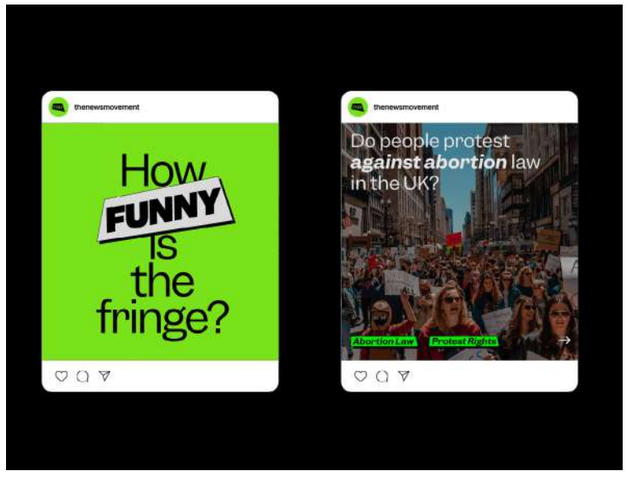
Vice

Vice is one media organisation that seems to get it right. Amassing millions of followers, the Vice TikTok posts simple, concise clips that lean into TikTok's under-polished aesthetic. Gen Z journalists record piece-to-camera videos or record voice-overs played behind fast-moving clips, tackling daily news and providing related information, for example: 'If NATO went to war with Russia, here's what could happen.'



The News Movement

Another successful example is The News Movement, a Gen Z-focused news brand that was launched in the UK in 2020. Similarly putting its Gen Z presenters in front of the camera, The News Movement TikTok and Instagram accounts post videos answering specific questions about news stories, such as 'What is the Iowa caucus?' The new media brand has hundreds of thousands of Gen Z followers on TikTok.



Left to right: Vice on TikTok; The News Movement, UK

Health and Wellness

65% of Gen Z in the UK and the US self-reported struggling with at least one mental health issue between 2020 and 2022

Source: Oliver Wyman

Project 84 by adam&eveDDB for Campaign Against Living Miserably tells the stories of 84 men lost to suicide, representing the 84 men who take their own lives every week in the UK

Health: Anguished Adolescence

From workplace boundaries to prioritising self-care, Gen Z undoubtedly have better language, tools and understanding of their mental health than previous generations. Despite this, between 2020 and 2022, 65% of Gen Z in the UK and the US self-reported struggling with at least one mental health issue (source: Oliver Wyman). Between April 2021 and March 2022, **Childline**, a telephone counselling service for children and young people in the UK, recorded a 61% increase in mentions of accessing support for suicidal thoughts (source: NSPCC).

A 2023 survey by girl-only youth organisation **Girlguiding** paints a similarly concerning picture: 89% of girls and young women aged 7–21 report feeling 'generally worried or anxious', with 61% saying they often feel this way if not most of the time. In 2009, when participants were asked if they were happy with how they looked, 72% said they were; in 2023, this fell to 59% (source: Girlguiding).

Boys and young men aren't exempt from this mental health crisis. A 2021 survey of 2,000 Millennial and Gen Z men found that only 26% were happy with their appearance and only 21% would feel comfortable admitting this to anyone. Almost half (48%) also reported struggling with their mental health due to their feelings about their bodies (source: Calm).

Boys are falling behind academically around the globe: in 130 countries they are more likely than girls to repeat primary grades and more likely to not have an upper secondary education in 73 countries (source: Unesco). Some argue that this unhappiness, underperformance and enduring stigma surrounding men's mental health has created the perfect environment for young men to fall under the influence of nefarious social media personalities who position toxic masculinity as the solution to young men's problems.

Case Studies

Mandem Meetup

Holding events in Manchester and Wolverhampton in the UK, Mandem Meetup helps men to feel comfortable sharing their feelings. In January 2024, the organisation released the documentary Mandem, a breath of fresh air on the internet, featuring the real-life stories of men who've been helped by the charity, expressing their feelings and how they came to seek help.



Dove

International brands are also paying attention to Gen Z's struggles with mental health. In 2023, personal care brand Dove released a campaign video raising awareness of the impact of social media in reinforcing toxic views on body image. Calling for better safeguarding on the internet, the video spoke to many of the concerns of teenagers and their parents in an authentic and relatable way.



Left to right: Mandem Meetup, UK; Cost of Beauty by Dove, UK

Leisure: Teetotal Trailblazers

Youth might typically be associated with reckless hedonism, but Gen Z are bucking the trend in favour of sober curiosity.

Typically, youth is associated with reckless hedonism, but one area where Gen Z seem to face no contradiction is in their relationship with alcohol. A 2020 study of college-age Americans found the proportion of non-drinkers had risen from 20% to 28% in a decade, while a 2023 report by charity Drink Aware found that the proportion of young adults who do not drink has increased from 14% in 2017 to 21% in 2023, although remaining relatively stable among the rest of the population (13%).

Alcohol hasn't been entirely rebuffed by Gen Z, but many are exploring sober curiosity and looking to 'sober influencers' – such as **Sober Girl Society** founder Millie Gooch – for guidance on reconsidering social lives without the presence of alcohol.

On average, Gen Z drink 20% less than Millennials, who also drink less than their predecessors (source: Forbes). This shift is thought to be predominantly due to an increased awareness of the dangers of alcohol and a prioritisation of health and longevity, although mental health plays a part too – 86% of Gen Z believe their mental health is as significant as their physical health with regard to drinking alcohol (source: Forbes).

As a result of this shifting attitude about alcohol, brands are rushing to bring low- or no-alcohol alternatives to market.





Left to right: The New Bar, US; Sippers is an online no- and low-alcohol store for the sober-curious, UK

'Gen Z are more aware than any generation before them of mental health issues and the need to care for themselves. Alcohol simply doesn't have the grip or glamorised appeal that it once had'

Brianda Gonzalez, founder and CEO, The New Bar

Case Studies

Lucky Saint

Since its launch in 2018, alcohol-free beer company Lucky Saint has secured more than £10m ($12.2m, €11.7m) in funding. In March 2023, the brand opened an alcohol-free pub in London, The Lucky Saint, which doubles as its headquarters and launched its second product in December 2023, the Lucky Saint Alcohol-Free Superior Hazy IPA.



The New Bar

Sober Bars are finding their footing in the hospitality market too; in 2022, alcohol-free drink discovery platform The New Bar was launched in Los Angeles. The e-commerce site sells products and provides tips and tools to help people drink less and in 2023, became Coachella music festival's first non-alcoholic retail partner.



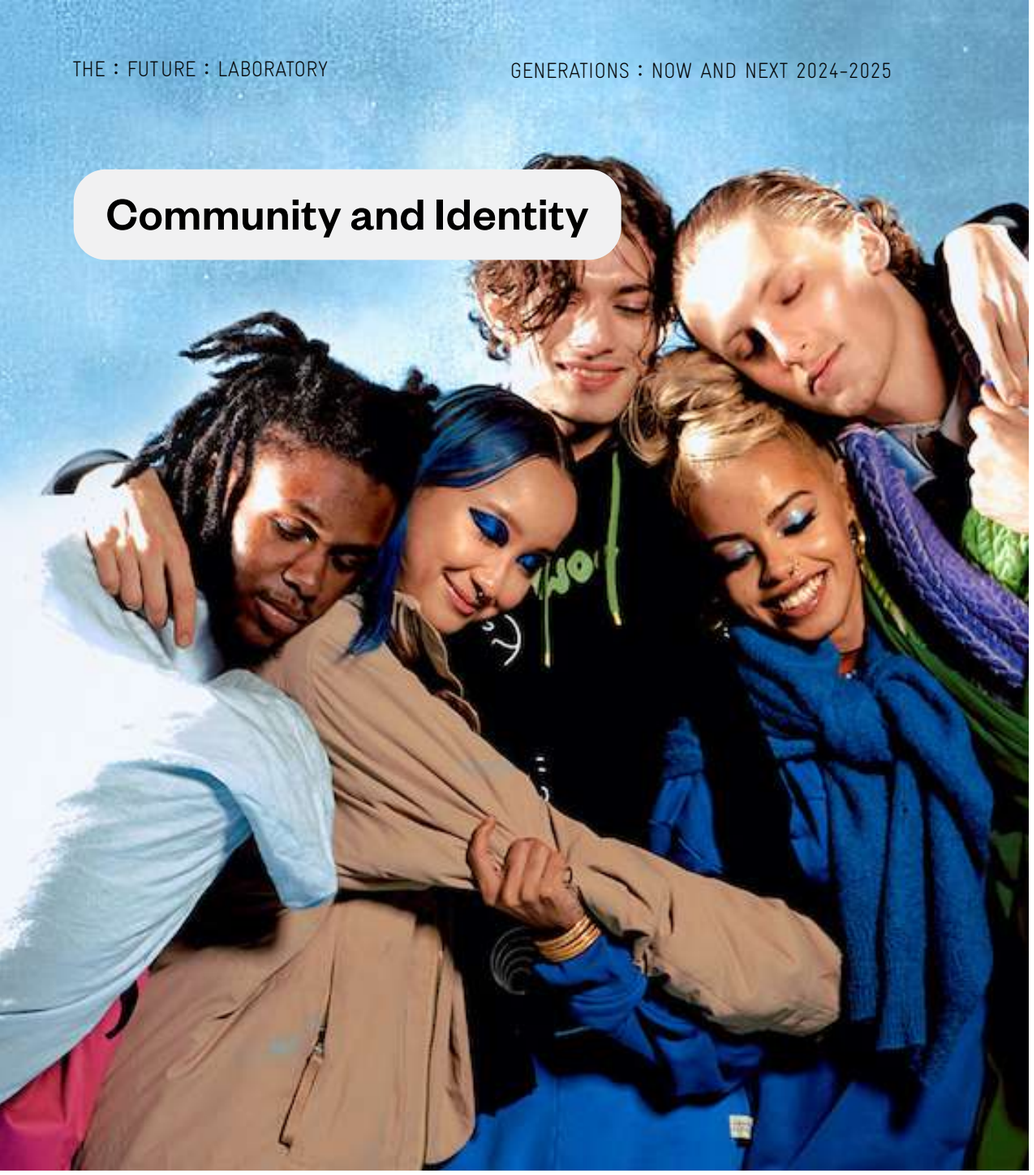
Love From

Offering alcohol-free twists on traditional cocktails and non-alcoholic beers and wines, Love From opened in Manchester, UK, in January 2024. It also hosts weekly quizzes, open mic nights and mindful art evenings, with founder Karl Considine aiming to spread the message that 'cutting out doesn't mean missing out'.



Left to right: Lucky Saint, UK; The New Bar, US; Love From, UK

Community and Identity



Left to right: Woo, UK; Hinge has created a free resource filled with ideas to unplug from technology and make real-world connections, US

‘One of the things that defines Gen Z is this state of flux. I think that you can see that in the way they approach identity, gender identity, relationships’

Zing Tsjeng, editor-in-chief, Vice

Relationships: Generation Isolation

When it comes to identity, Gen Z know that the rules of the past do not apply. This cohort are 82% more likely than other generations to believe traditional gender norms are outdated and 130% more likely to believe it’s ok to be in an open relationship (source: Oliver Wyman). Marriage is considered to be an optional, rather than a necessary, life stage, with 85% of US Gen Z and Millennials saying they don’t believe marriage is necessary to have a committed and fulfilling relationship, according to the Thriving Center of Psychology, and more women than ever in England and Wales remain childless by their 30th birthday, signifying a decision to have children later in their 30s or not at all (source: Office for National Statistics).

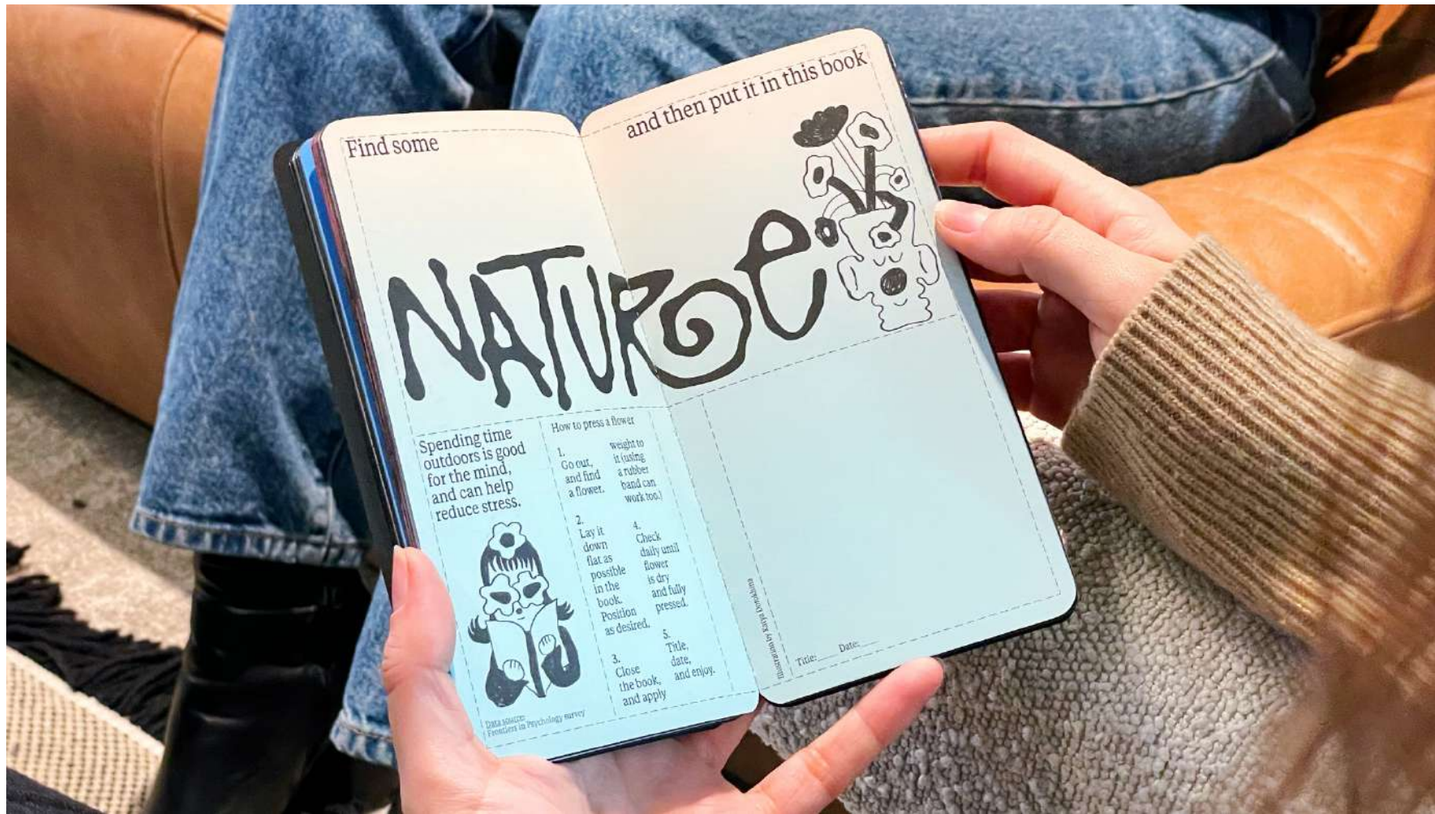
Concurrent to this liberal attitude to relationships and identity, however, is a state of loneliness, with The Cigna Group finding that 73% of 18–22-year-olds reported feeling alone ‘sometimes’ or ‘always’. This loneliness comes from all sides: Gen Z today experience 1,000 fewer hours of in-person connection annually compared to two decades ago, according to the University of Rochester, only 28% of UK families eat dinner together in the evenings, according to **Sainsbury’s**, and the cost of living is no doubt curtailing young people’s social budgets.

In addition, recent studies have revealed that Gen Z are undergoing a worrying gender divergence. Findings from King’s College London’s Policy Institute and Global Institute for Women’s Leadership found that one in six (17%) of the UK public believe that in 20 years’ time it will be harder to be a man than a woman. Men aged 16–29 are almost twice as likely to feel this way, including 19% who think it will be much harder to be a man. ‘It’s not the whole of Gen Z men, but it is quite a big and worrying chunk,’ says Professor Bobby Duffy, director of the Policy Institute. ‘Usually, generations are more progressive one after the other in social issues and come close together across these sorts of demographics.’

Meanwhile, in the US, data from Gallup published in the **Financial Times** shows that women aged 18–30 are now 30 percentage points more liberal than their male contemporaries, after decades of being spread roughly equally across political views.

In the wake of the Me Too movement, young women feel more empowered than ever to reject heterosexual standards and express progressive views, which in turn seems to be pushing young men the opposite way, offering little to no role models for healthy masculinity. Algorithms are exacerbating these differences, creating increasingly divisive online spaces where a glimmer of interest in feminism or ‘toxic masculinity’ will result in being served hundreds of videos on the topic, eliminating the chance of exposure to content challenging personal views or promoting empathy and compassion for others.

The result is a fragmented generation craving intimacy and connection.



Case Studies

Runners High

In 2023, 26-year-old Celina Stephenson founded the Gen Z running club Runners High in London. More than 200 women take part in each run, with Stephenson saying that the club's popularity is down to Gen Z's 'collective desire for community that doesn't revolve around heavy drinking, spending a lot of money and staying out late'.



One More Hour

In December 2023, dating app Hinge launched One More Hour, a £796,700 ($1m, €927,895) fund dedicated to providing grants to social groups offering in-person socialisation in US cities. 'There has been a steady decline in free and accessible third spaces for people to build community,' says Josh Penny, social impact director at Hinge.



Tinder

In January 2024, Tinder launched a UK film ad following Ava, a young woman who is feeling lonely after moving to London. She downloads Tinder and is pleasantly surprised by the wide circle of relationships – platonic and romantic – the app unlocks. The ad reframes Tinder as an app for companionship as much as for sex.



Left to right: Runner's High, photography by *Caio Turbiani*, UK; One More Hour by Hinge, US; Tinder, UK

Sustainability



eBay is encouraging second-hand shopping with the opening of its Swap 'Em Out store, in which people can swap sneakers they don't wear for a pair they will, UK

Individual: Contradictory Consumers

Eco-sensibilities are at the fore of many Gen Z's brains, so why can't they stop buying fast fashion?

Sustainability is perhaps the area where Gen Z's paradoxical attitude is most conspicuous. Growing up with Greta Thunberg as a peer role model and at a time when the gravity of the climate crisis was slowly dawning on much of society, eco-sensibilities are at the fore for many, with 51% of Gen Z checking a company's corporate social responsibility statement before making a purchase, 62% preferring to buy from sustainable brands and 73% willing to pay more for sustainable products (sources: Forrester, First Insight).

The climate crisis also takes a toll on Gen Z's mental wellbeing. A survey of 10,000 16–25-year-olds in 10 countries revealed that 59% were 'very' or 'extremely worried', and 84% at least 'moderately worried', about climate change (source: Preprints with The Lancet).

Yet, despite 65% of Gen Z saying they want to shop more sustainably and buy higher-quality clothing, one-third also describe themselves as 'addicted' to fast fashion, and in the UK, 64% of 16–19-year-olds say they have purchased clothes that they have never worn (sources: ThredUp, Mintel). The success of **TikTok** Shop (the social media platform's e-commerce site) and the continued popularity of fast fashion retailers such as **Shein** and **Pretty Little Thing** among Gen Z consumers further attest to a contradiction in Gen Z's sustainability ethos.

This incongruity is often attributed to financial barriers to sustainable living. In a 2022 survey of UK Gen Z and Millennials, 96% said they have been negatively affected in their ability to make a sustainable choice due to the increase in the cost of living (source: 33Seconds). Worryingly, new research from the Center for Countering Digital Hate has found that a third of UK teenagers believe climate change is 'exaggerated', largely due to climate misinformation on social media.

Despite **65%** of Gen Z saying they want to shop more sustainably and buy higher-quality clothing, one-third also describe themselves as addicted to fast fashion

Source: ThredUp

Case Studies

Liquid Death

Realising Gen Z are suffering from information overload, brands are turning to subversive humour to cut through the eco-noise. In May 2023, canned water company Liquid Death released a spoof advertisement addressing the global plastic pollution issue by introducing a fictional cosmetic surgery clinic where plastic bottles are inserted into the body.



Glimpse

In August 2023, non-profit creative collective Glimpse took to Instagram with its Unfollow an Influencer film, featuring faux-influencer Sally who is going on a brand trip with Shell. As she defends her decision to collaborate with the oil giant, she splutters up thick black oil-like liquid. The parody ends with the copy ‘Oil companies pay influencers to make their dirty businesses look green’.



Left to right: Liquid Death, US; Unfollow an Influencer by Glimpse, UK

Foresight

Here, we expand on speculative future scenarios to 2030. Building on the Insight section, Foresight delves into what's possible: new directions, divergences or developments. For Gen Z, we explore how adulthood might restore a sense of agency for this paradoxical generation



Welcome to the Z-Suite

By early 2024, Gen Z in the US are predicted to overtake Baby Boomers in the full-time workforce, ushering in a second rethink of workplace culture.



Positive Parenting

While Gen Z feel paralysed by uncertainty in their lives, one way they might regain agency is in the education and upbringing of their children.



Eco-ducation

The structures of education and work will help Gen Z overcome their cognitive dissonance by providing the tools to help them feel empowered and enact change.



Social Scavengers

Love, connection and intimacy play heavily on Gen Z's minds. Burnt out from dating apps and excessive screen time, they're trying to log off and get real.

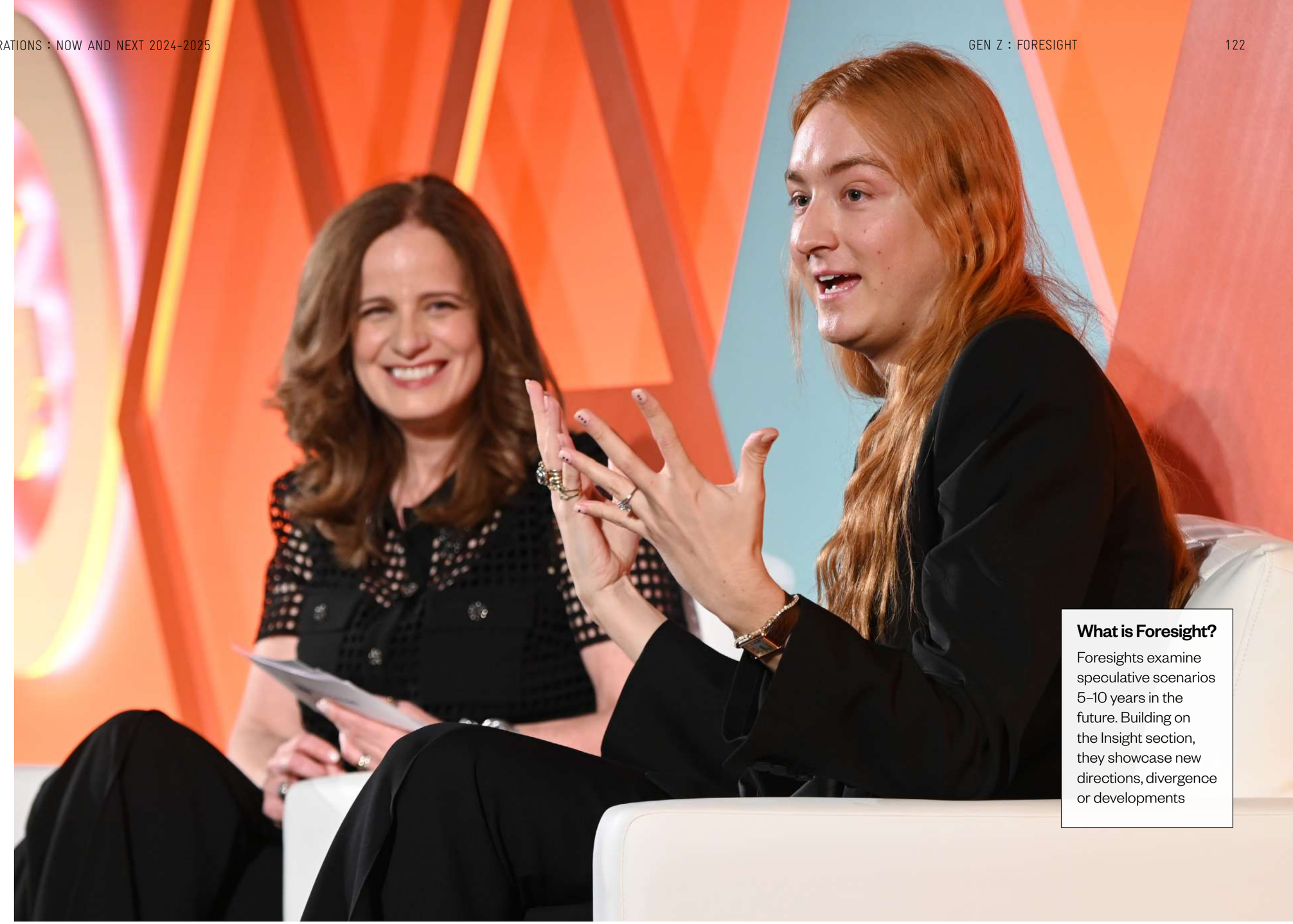
Welcome to the Z-Suite

By early 2024, Gen Z in the US are predicted to overtake Baby Boomers in the full-time workforce, ushering in a second wave of rethinking workplace culture, according to Glassdoor, with hybrid working, flexible hours and four-day working weeks being hot topics of conversation.

'Gen Z are becoming more and more aware of creating a work-life balance that is more attuned to their long-term personal goals,' says **The Z Link's** Erifili Gounari. She explains that Gen Z believe it is possible, and necessary, to create a working culture that 'contributes to fulfilment and happiness rather than hindering it, like so much traditional career advice would have you believe'. Where Millennials were swayed by office perks such as table tennis and free breakfast, Gen Z are only interested in financial remuneration and flexibility.

It won't be long until Gen Z start looking to the growing interest in longevity either. This will see demand for adaptations to offices and work culture to fit in with advice from scientists on how best to protect the mind and the body for a long lifespan. A 2023 report from US firm HMC Architects points to fresh air, natural light, green spaces, thermal comfort, nutrient-rich snacks and access to health centres as essential features of offices designed for employees' wellbeing.

Tired of being dismissed as unprofessional snowflakes, Gen Z will also be keen to collaborate with Gen Alpha to stay in touch with youth culture, recognising the importance of inter-generational workforces for brand resilience. 'You can't expect to future-proof your brand if your team is all 50-year-old men that have no connection to communities on the internet,' summarises Gounari.



What is Foresight?

Foresights examine speculative scenarios 5–10 years in the future. Building on the Insight section, they showcase new directions, divergence or developments

Gen Z Lab by Edelman

By early 2024, Gen Z in the US are predicted to overtake Baby Boomers in the full-time workforce

Source: Glassdoor



Puma and Liberty autumn/winter 2023

Positive Parenting

Data suggests that 2032 will be the year that the largest number (770,000) of Gen Z mothers give birth for the first time in the US, and by 2060 there will be 17m Gen Z mothers in the US (sources: Openfields, Capita).

While Gen Z might have suffered through years of feeling paralysed by uncertainty in their own lives, one way they could regain agency is in the education and upbringing of their Gen Alpha and Gen Beta (born 2024+) children.

Gen Z's parenting priorities include 'ensuring tech-free time for children' (50% versus 40% of Millennial parents), 'being open to children exploring their own identity' (53% versus 45%) and 'keeping kids busy with lots of activities (48% versus 34%) (source: What to Expect). This hands-on, social-wary approach to parenting will help them empower the next generation to take on the world while protecting themselves and their mental health.

Raising planet-conscious kids will also be a priority for Gen Z parents, and they will expect the same sustainability standards for their children's toys, clothes and food as their own.

Optimistically, this is already beginning to manifest with brands entering the kids' second-hand clothing market. American children's clothing company Hanna Andersson, for example, launched a Hanna-Me-Downs resale site in February 2023 where people can buy and sell the brand's pre-loved clothing.

In October 2023, toy manufacturer VTech launched Turbo Edge Riders, a toy car racetrack building set that uses spare cardboard boxes to create the track. Ready to recycle once children grow bored of it, the toy also introduces youngsters to the concept of upcycling.

By 2060 there will be 17m Gen Z mothers in the US

Source: Capita



Left and right: Wild Awake, US

Eco-ducation

New degrees, curriculums and careers in sustainability will play a huge role in Gen Z's lives in the coming years. The structures of education and work will help Gen Z overcome their cognitive dissonance by providing the tools to help them feel empowered and enact change.

In autumn 2023, Black Mountains College, UK, enrolled its first students in a new undergraduate degree, Sustainable Futures. Students on the three-year cross-disciplinary course will study climate science, neuroscience, environmental history and critical thinking, with the aim to train the next generation of change-makers.

In Spain, the University of Barcelona has plans to introduce a mandatory climate course for all students in the 2025/2026 academic year, following pressure from student activists (source: Times Higher Education). Before then, in India, all university students will have to study subjects such as environmental education to graduate in spring 2024 (source: University World News).

Collective efforts to tackle the climate crisis will also provide Gen Z with a much-needed sense of community. Eco-endeavours will become a hobby and pastime as much as work or school, helping to alleviate loneliness at the same time as saving the world. Sustainability creator and slow fashion designer Lydia Bolton's upcycling workshops, for example, provide Gen Z with a space to catch up with friends while learning eco-focused skills such as how to make hair accessories out of old clothes.

All university students in India will have to study subjects such as environmental education to graduate in spring 2024

Source: University World News





Nike AU Collection

73% of **18–22-year-olds** report feeling alone ‘sometimes’ or ‘always’

Source: Cigna

Social Scavengers

Love, connection and intimacy play heavily on Gen Z’s minds. Burnt out from disastrous dating apps and excessive screen time, they’re trying to log off, but the world has changed, and no one seems to know how to meet people in real life any more.

Gen Z don’t go to church, urban living means most don’t know their neighbours, work-from-home culture leaves fewer opportunities for friendships to form in the office and, because they are drinking less, they aren’t meeting up in the traditional spaces. Post-Covid, Gen Z’s circles have become smaller and smaller, and tech-induced loneliness has ensued.

The tide is turning, however. Working out has undergone the mass movement treatment as Gen Z form communities in running clubs, climbing gyms and yoga studios. Wellness hubs are the next frontier, as urban bathing becomes more accessible through initiatives such as **Hackney Community Saunas**, which opened its second location in East London in January 2024. Regular community events are the key to its success, such as the once-monthly trans sauna night.

Even book clubs are back. In October 2023, independent New York bookstore **McNally Jackson** launched four book clubs, including an after-hours club, with the tagline ‘read, flirt, sip’ – a speed-dating style discussion event, bringing young people together through literature.

Brands wanting to make an impression on Gen Z will increasingly need to find ways of fostering a connection between their customer base and follower counts, using social media and digital marketing campaigns to bring young people together in real life.

Strategic Implications

Our Strategic Implications are actions and future considerations for brands and businesses to contemplate



Photography by CottonBro, Russia

Strategic Actions



Building a blue-zone office

Designing office spaces with longevity in mind will not only improve employee wellbeing but also reduce absenteeism and employee turnover, saving your company money in the long term



Sponsored third spaces

Communicate an understanding of Gen Z's needs by sponsoring and hosting events in third spaces such as sober bars or workout studios, bringing young people together and attracting earned media opps

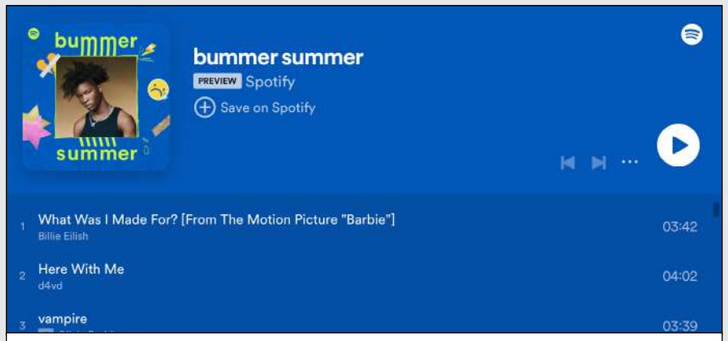


Simple and subversive sells

Alleviate Gen Z's information overload by keeping brand communications simple and using subversive humour to provide a welcome break from what they view as the current doom and gloom

Left to right: Toi Toi Toi Creative Studio for Contentful. Photography by Koy+Winkel, Germany; Queering School/s by Emma Sfez. Photography by Ronald Smits, The Netherlands; Wise. Identity by Ragged Edge, UK

Thought-starters



To tackle misinformation, consider tapping into information-led digital channels such as YouTube and Spotify, where misinformation is rife



As first-time Gen Z parents emerge, how can your brand use inclusive language to cater for an increase in non-traditional families?



Can your business help Gen Z redeem agency and a sense of purpose by involving them in social or sustainability initiatives?

Left to right: Bummer Summer campaign by Spotify; Photography by William Fortunato; Woodland Trust: Plant More Trees campaign by Creature London, UK



H&M and Eva Chen, US, Canada, and Mexico

Born 2013-2025

Gen Alpha Now and Next

From the *Sandbox* to *Roblox*

This is the first generation to be born entirely in the 21st century, and many of the technologies, careers and crises that will define and shape the lives of Gen Alpha are yet to exist



At a glance

: Born between 2013 and 2025, Gen Alpha are the first generation born entirely in the 21st century

: Armed with a tech-native understanding of the world, for them life without social media, smartphones and streaming services is hard to picture

: Many of Gen Alpha were born or began their early years amid the Covid-19 pandemic, the true impact of which is still being measured

: This cohort will never know a world without extreme weather, and the climate crisis will shape their education, careers and family lives

: Gen Alpha's spending power is forecast to grow three times faster than other generations by 2030 (source: Bain & Co)

Blooming Sexualities by Taïs Holzhauer. Photography by *Iris Rijskamp*, The Netherlands

Born between 2013 and 2025, Generation Alpha are only just getting started, but by 2030 their spending power is forecast to grow three times faster than other generations (source: **Bain & Co**).

Armed with a tech-native understanding of the world, for them life without social media, smartphones and streaming services is hard to picture. In fact, growing up in the era of spatial computing, Gen Alpha might be referred to as the quantum leap generation and the technology, jobs and family structures that will shape their lives seem light years from the world we know now.

The minimum age limit for apps such as **TikTok** and **Instagram** might be 13, but the oldest Alphas are already making a name for themselves on social media. In December 2023 the first Gen Alpha meme went viral, with social media's youngest users viewing and sharing 'Skibidi toilet' videos (videos of evil toilets with scary faces fighting one another). Gen Z were appropriately baffled by the videos.

Their parents have nicknamed them the honey badger generation owing to their tenacious and fiery personalities and happiness to call out and challenge injustice. One Gen Alpha parent on TikTok describes her five-year-old child as having 'more fury, fire and conviction in their pointer finger – which they don't mind putting in your face – than any activist or politician'.

Proactive where Gen Z and Millennials were reactive, Gen Alpha have the tools and parental (or sibling) role models to feel empowered to navigate the modern world. Set to be the largest generation in history, according to McCrindle, they won't plant trees or wear tote bags to try and save the world but will take a methodological approach, exercising technology for good and creating curriculums and careers to help form radical new societal structures.

If Gen Z challenged the status quo, Gen Alpha are here to reset it completely.

In Britain, **25%** of Generation Alpha with smart devices speak to apps such as Alexa every day. Yet only **11%** talk daily to their grandad, and just **14%** to their grandma

Source: YouGov

Drivers

Moulded by empathetic parenting, social scarcity and a fluent yet cautious attitude to technology, Gen Alpha are conscious and creative pioneers, embracing the future with inherited resilience



Benevolent Browsers

Raised with an understanding of the impact of excessive screen time on mental wellbeing, Alphas are already developing healthier attitudes to being online.



Social Scarcity

Beginning their lives during the pandemic, many Alphas missed out on the formative social experiences necessary for optimal cognitive development.



Neo-Nurture

As parenting shifts towards prioritising and protecting mental wellbeing, Gen Alpha's world view is shaped by empathy for the planet and the people on it.



Fluid World

Inheriting a less structured and rigid world, Gen Alpha are creative visionaries, embracing change and redefining norms for a better future.

Benevolent Browsers

Raised with an understanding of the impact of excessive screen time on mental wellbeing, Alphas are already developing healthier attitudes to being online.

Could members of Gen Alpha finally declare death to doomscrolling? Despite being young, evidence suggests they are already developing healthier attitudes to being online than their parents and siblings.

When Gen Alpha are online, they're seeking out sandbox games such as **Minecraft**, **Roblox** and **Fortnite**, user-generated spaces that revolve around building, creating and socialising. A 2021 report from Common Sense found that just 12% of Generation Alpha tweens enjoy social media 'a lot', whereas 61% enjoy online videos and 47% enjoy video games. They are seemingly less interested in content creation too, spending eight minutes a day creating content versus an hour and a half each day gaming (source: Pew Research Center).

Where Gen Z lack role models to help them navigate our digital world, Gen Alpha are being raised with an understanding of the impact of excessive screen time on mental wellbeing. A quarter of the oldest members of Generation Alpha say it would be very easy for them to give up social media, compared to 16% of the youngest members of Generation Z (source: Pew Research Center).

'Gen Z have developed a healthy scepticism of social media, which I think is going to drive them to limit their own children's exposures,' says Joe Waters, co-founder and CEO of children's policy think tank Capita.

On the other hand, Gen Alpha are the victims of 'sharenting' – the over-zealous documentation of their every move on social media by snap-happy parents – and a desire to get offline might reflect a backlash to that. After all, spending four hours a day on social media loses its cool if your mum, grandma and uncle are all doing it too.

The digital habits of these benevolent browsers paint a hopeful picture of how they will use technology in the future, with nearly half (41%) of Gen Alpha seeing technology as making the world a better place (source: Beano Brain).

A quarter of the oldest members of Generation Alpha say it would be very easy for them to give up social media, compared to **16%** of the youngest members of Generation Z

Source: Pew Research Center



Photography by Julia Cameron

What are Drivers?

Drivers are fundamental shifts and external forces that have the potential to reshape the future trajectory of a brand or business, also sometimes referred to as mega-trends or global forces of change. They differ from trends in that they are long-term structural forces that are pervasive, powerful and transformative



Left to right: Photography by Anastasia Shuraeva, Russia; Photography by Katerina Holmes

‘For some children, they’ve not had much interaction at all if they’ve spent all their time looking at screens. Children have been talking in the funny voices of cartoons they’ve been spending enormous amounts of time watching’

Amanda Spielman, former chief inspector, Ofsted (source: BBC Radio 4’s Today programme)

Social scarcity

Beginning their lives during the pandemic, many Alphas missed out on the formative social experiences necessary for optimal cognitive development.

Many of Gen Alpha were born or began their early years amid the Covid-19 pandemic. From babies meeting their grandparents for the first time on Zoom to nurseries being shut for months on end and toddlers not playing with other children until well into their first years, only now are we beginning to measure the true impact of the pandemic.

A study in Ireland of 309 babies born in the first three months of lockdown found that, on average, only three people had kissed the babies born in the pandemic (including their parents) and one in four babies had not met another child their age by their first birthday (source: Royal College of Surgeons in Ireland).

Data recently presented by Labour’s education team found that more than 80,000 children born in 2020 or 2021 did not reach one or more of the key measures of progress for their age group in 2023 (source: The Guardian). Another report based on childcare provider inspections in 2022 found that some babies even ‘struggled to respond to basic facial expressions’ partly due to interacting with people wearing face masks (source: Ofsted).

‘It was people at transitions that were most affected, whether that’s going to school for the first time or changing from primary to secondary school,’ explains Professor Bobby Duffy, director of the **Policy Institute** at King’s College London and author of Generations: Does When You’re Born Shape Who You Are? The pandemic ‘exposed vulnerabilities’, he says, creating a gulf in impact, driven by class and income as well as life-stage transition points.

This divide was also identified in a social distancing and development study from Oxford Brookes University’s **Babylab**, undertaken during the spring 2020 UK lockdown. The study found that children who attended nurseries and childminders more frequently during the pandemic had higher vocabulary skills and more advanced social readiness and emotional development, while disparities between disadvantaged children and their peers also widened during this time (source: Babylab).

‘For some families, lockdown was a very positive experience because that allowed parents to spend quality time with the children,’ says Dr Nayeli Gonzalez-Gomez, senior lecturer in psychology and researcher at Babylab. ‘But on the other side, you have families that really struggled in terms of parental mental health issues, financial difficulties, lack of access to resources, and all of that has an impact on infant cognitive development.’



Neo-Nurture

As parenting shifts towards prioritising and protecting mental wellbeing, Gen Alpha's world view is shaped by empathy for the planet and the people in it.

Liberal, planet-conscious and sensitive to their children's mental health, 70% of Gen Alpha parents in the US are Millennials, 21% are Gen X and 8% are Gen Z (source: Morning Consult). Raised as inherent empaths, Gen Alpha's understanding of the world is bolstered through the hyperconnectivity of the internet, for better and for worse. 'Social media and tv bring the realities of conflict and natural disasters directly into children's homes,' explains Melanie Pilcher, quality and standards manager at pre-school educational charity the Early Years Alliance. 'Even very young children are much more aware of the wider world around them.'

As a result, parents of Gen Alpha children don't take the decision to have children lightly and they shoulder the responsibility of helping Alphas make sense of what's going on: 87% of Millennial mums and dads say parenting is their most important job and that they are taking the role as seriously as, and sometimes instead of, their next big career move (source: **Beano Studios**). Investing in a hands-on approach is essential to parents of Alphas, with 53% putting faith in their children to help solve the problems caused by previous generations (source: Beano Brain).

Millennials are parenting differently than their predecessors too: 81% think it is more important to be happy than successful, signifying a shift from 'tiger' or 'helicopter' parenting to more gentle parenting styles (source: Beano Studios).

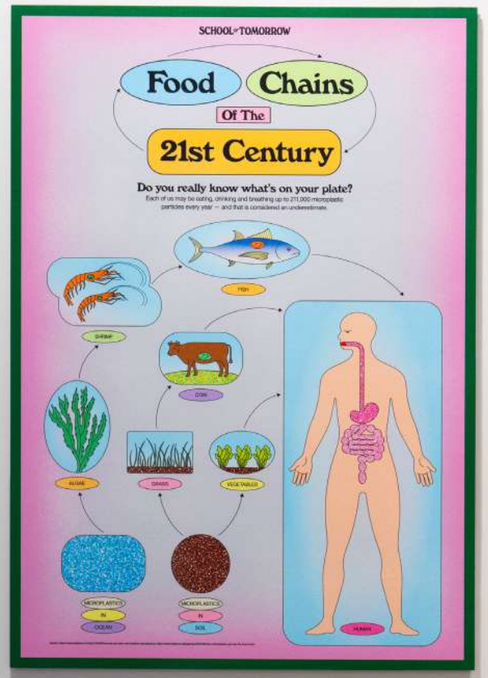
But when it comes to monitoring children's use of technology, the parents of Gen Alpha take a stricter approach. Still navigating their own relationship with technology and social media, parents are turning to 'drone parenting' – using apps to limit screen time on children's devices or GPS trackers to keep track of their locations, with 82% of children saying that their parents supervise or limit their use of technology (source: Qustodio).

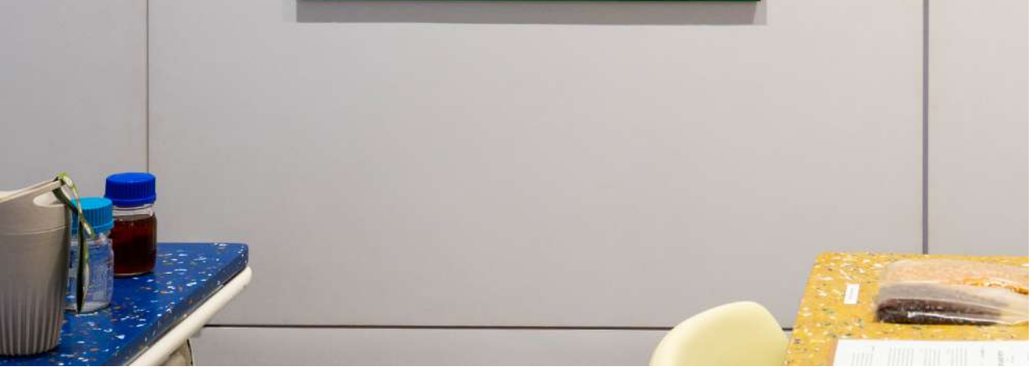
81% of Millennial parents raising Gen Alpha children agree that it is more important for their children to be happy than successful

Source: Beano Studios



Nerys Jones featuring Sports Banger, captured during Covid-19 lockdown, UK





Left and right: School of Tomorrow by *Kinetic Singapore* for Singapore Design Week is a fictional education experience teaching the threats and challenges of a changing planet, Singapore

For the first time, children of colour comprise more than half of the total US youth population

Source: Brookings Institution

Fluid World

Inheriting a less structured and rigid world, Gen Alpha are creative visionaries, embracing change and redefining norms for a better future. Alphas are inheriting a less structured and rigid world. Curriculums are being decolonised, education systems and work-life balance are being reviewed and inclusive modern relationships have eclipsed the nuclear family. In 2013, when the first Alphas were being born, the Marriage (Same Sex Couples) Act was passed in England and Wales; two years later, the US Supreme Court ensured that every state in the country would allow same-sex marriage.

This fluidity makes space for Gen Alpha to be themselves. Neurodivergence is better understood and accommodated in schools and workplaces and despite a seemingly constant backlash against young people's 'woke agenda', Europe is becoming more socially liberal over time (source: World Values Survey).

Gen Alpha are also set to be the most diverse generation yet (source: Warc) and for the first time, children of colour comprise more than half (53%) of the total US youth population (source: Brookings Institution).

In our macrotrend report The Zalpha Reckoning, published in 2021, we unpacked how the youngest Zoomers and Gen Alphas are 'the first generation who do not need to unlearn antiquated behaviours, thus becoming a group of radical compassionates and diversity natives' – a statement that holds fast today. The world is far from perfect, and conflict and the cost of living crisis very much define the present day, but a more fluid world sets the stage for Gen Alpha to grow into creative visionaries and their imagination for the future knows few limits.



Insight

We assess the significant insights across each generation in relation to Success and Achievement, Technology, Health and Wellness, and Community and Identity



Success and Achievement

Gen Alpha's parents have experienced financial turmoil and as a result, they are keen to give their children the best financial education possible.



Technology

Gen Alpha's early digital habits suggest their parents are helping them to form healthy relationships with technology, learning to balance the offline and online worlds.



Health and Wellness

In the past, parents worried about their children and the danger of drugs and alcohol or unwanted teenage pregnancies. Nowadays, they worry about mental health.



Community and Identity

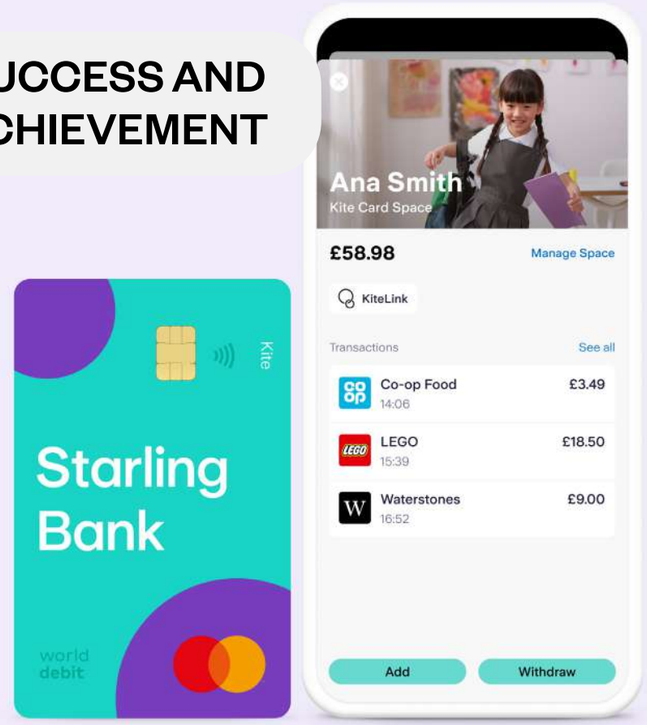
Described as 'mini-Millennials' due to their majority-Millennial parents, Gen Alpha are eating planet-conscious foods and playing with sustainable toys.



Sustainability

Empowered by their parents, Gen Alpha are already exhibiting signs of being conscientious consumers, seeking out brands with a positive impact.

SUCCESS AND ACHIEVEMENT



Finance: Pocket Money Economy

Gen Alpha's parents have experienced the fallout from financial crashes, cost of living crises and recessions. As a result, they're keen to give their children the best financial education possible. More than half of Millennial parents have already discussed money with their children, according to Coinbase, and more than half of UK parents think children should start learning about money between the ages of eight and 10 (source: Netguru).

Gen Alpha are already establishing brand affinity and influencing their parents' purchases. More than four in five parents of Gen Alphas say they ask for specific tv shows or food and snack brands, according to Morning Consult, and 40% of Millennial parents say requests from their children influence what they purchase for them (source: YPulse).

By the end of 2024, more than £4.23 trillion ($5.39 trillion, €4.95 trillion) will be spent on Gen Alpha annually, an amount that will increase by £7.8bn ($10bn, €9.2bn) every year (source: Harvard Business Review Analytic Services). Long gone, however, are the days of pocket money being paid in pound coins. In 2021, pocket money app RoosterMoney found that 60% of surveyed parents say their children would turn down £10 ($13, €12) of pocket money in favour of 1,000 V-Bucks (Fortnite currency) or another gaming currency. Virtual goods are increasingly replacing sweets and toys as Gen Alpha's priority for spending, despite parents' caution about games that continuously prompt in-game purchases.

As they grow older, these digital natives will use technology to help them track and analyse their spending behaviours and to enhance money management.

60% of surveyed parents said their children would turn down **£10** ($13, €12) of pocket money in favour of **1,000 V-Bucks** (Fortnite currency) or another gaming currency

Source: RoosterMoney



Left and right: Starling Bank Kite card, UK

Case Studies

GoHenry

GoHenry, a debit card and financial learning app for 6–18-year-olds in the UK and the US, launched an eco-card made from renewable materials in May 2020, appealing to Gen Alpha's conscious nature. A year later, the company introduced Money Missions, quizzes, videos and interactive lessons, gamifying finance to incentivise children to learn more about money management.



Ally

In 2021, US online bank Ally and financial media brand Blockworks created Fintropolis, a gamified learning experience created for Minecraft. Using real-world scenarios in pixels, the game introduces users to financial concepts as they explore the city, earn gold to purchase homes and learn the value of decisions such as spending versus saving.



Left to right: GoHenry, UK and US; Ally, US

What is Insight?

Insights explore the nascent consumer behaviours, attitudes and trend responses emerging today that will evolve or gain traction in the near future through to 2025. Insights help brands and businesses to understand and identify the opportunities presented by this trend



FutureSchool.AI is an online learning platform offering courses in machine learning and artificial intelligence. Branding by *Studio Alessia Oertel*, Asia

85% of respondents believe it will be important for businesses to have a chief metaverse officer by 2030

Source: Qlik

Work: Prophetic Professions

Generation Alpha will probably grow up to work in jobs and study degrees that don't yet exist. A Qlik survey found that 85% of respondents believe it will be important for businesses to have a chief metaverse officer by 2030 when older Alphas are entering the work market, and 88% believe their companies will hire for a head of betterment by the same year. McCrindle research, meanwhile, points to cybersecurity, app development and cryptocurrency as key fields for future careers.

In April 2023, Bloomberg interviewed 678 investors on the future of work. Almost 40% recommended that, in order to AI-proof their careers, children who are currently in primary school should, when they reach adulthood, seek jobs in healthcare that require human-to-human interaction. Artificial intelligence will alter and change many careers significantly over the next decade, meaning the job market will look very different by the time Gen Alpha enter it (source: Goldman Sachs).

Gen Alpha will also want, and need, green careers to help countries achieve and maintain net-zero targets. By 2030, as the oldest of Gen Alpha leave secondary school and begin to consider their career prospects, the International Labour Organization projects the net creation of 18m green jobs, including 4m in manufacturing and 9m in renewables and construction.

While Gen Z hold a reputation for friction in the workplace, businesses are beginning to recognise that hearing the voices of the next generation is essential for building resilience. The benefit of intergenerational learning is also being taken on by the UK government, which in 2023 launched a scheme giving children aged five to eight from underperforming schools a chance to meet employees and role models from different industries to raise aspirations and link learning to future jobs (source: The Guardian).

Case Studies

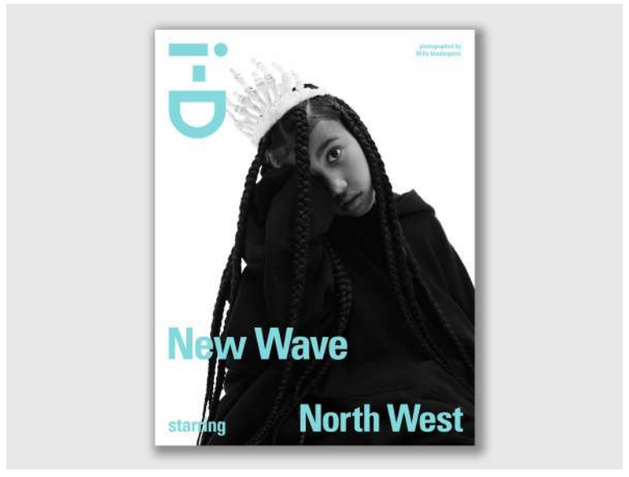
Visa

Digital payment network Visa launched Junior Inventors' Day in 2024 to find its first junior innovation officer. The scheme is open to children aged eight to 14. The successful applicant will get the chance to pitch an invention, interview an employee, join a board meeting and share ideas on how companies should prepare for Gen Alpha employees.



i-D

In October 2023, 10-year-old North West (daughter of Kim Kardashian and Kanye West) was i-D magazine's youngest-ever cover star. Describing herself as 'The best ever', the Gen Alpha influencer (@kimandnorth has 18.4m followers on TikTok) declared: 'One day, I want to own Yeezy and SKIMS.'



Louis Vuitton

In November 2023, a proud mother from France posted her son's fashion sketches of Louis Vuitton designs on X (formerly Twitter) in the hope of securing him a work experience placement. The fashion house offered Milan a week's internship, making this 13-year-old Gen Zalpha (on the brink of Gen Z and Gen Alpha) LVMH's youngest-ever employee.



Left to right: Junior Investors' Day by Visa, UK; North West for i-D, US; LVMH intern drawing, France

Education: AI Academics

Alphas are set to rival Millennials as the most educated generation ever, with new technology and sustainability-focused curriculums and education centres.

In the same way that Gen Alpha's job market will look very different to that of their predecessors, so will their curriculums and degrees. From plans to introduce a natural history class focusing on climate change in the UK in 2025 (source: Gov.UK) to new qualifications such as the Advanced British Standard, education is due for an overhaul and Gen Alpha will have front seats in the lecture hall.

Gen Alpha will also be drawn to education centres that take cues from hybrid working and integrate technology into their curriculums. According to data from YPulse, 56% of Millennial parents say their children already use online study platforms such as **Duolingo**, **Quizlet** and **Kahoot!**, and the British Computer Society (the chartered institute for IT) is calling for children as young as 11 to be taught to work with generative AI tools to set them up for the future.

A 2023 Ofcom report found that among 7–12-year-olds, two in five have already used an AI tool such as **ChatGPT** or **Snapchat's** My AI. Gen Alpha's enthusiasm for this technology indicates that advanced AI chatbots have the potential to be used as a powerful classroom aid, helping capture this tech-savvy generation's attention by making lessons more interactive and personalised. Effective implementation of generative AI in schools, however, will require an allotment of time and funds for teacher training, both of which are in short supply across the education sector.





Left to right: Dig World, US; FutureSchool.AI is an online learning platform offering courses in machine learning and artificial intelligence. Branding by *Studio Alessia Oertel*, Asia

In November 2023, **42%** of primary and secondary teachers in the UK had used generative AI in their role, up from **17%** in April

Source: Department for Education

Case Studies

Roblox

The ways in which Gen Alpha will apply for and be interviewed for jobs is likely to look different too. In 2023, Roblox introduced a virtual company career centre on the metaverse platform where prospective job candidates can participate in events, listen to podcasts and hold conversations with current employees. Tailored for junior role applicants, the centre aims to attract job hunters who grew up playing Roblox.



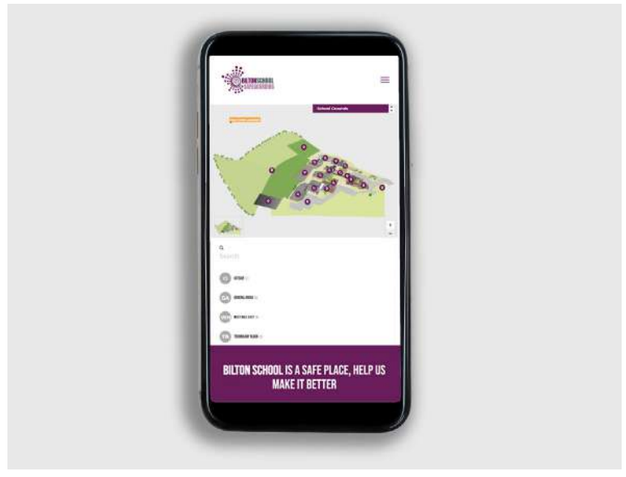
Elf Cosmetics

In November 2023, Elf Cosmetics launched Elf Up!, a tycoon-style Roblox experience designed to foster entrepreneurial skills and financial literacy among young consumers. Users can play at being entrepreneurs and earn Robux virtual currency. The virtual landscape is also a play on the brand's product offerings, with a Big Mood recording studio, Holy Hydration! marine life charity hub and Halo Glow jewellery and art gallery.



The Student Voice

In 2023, schools in Norfolk and Salisbury, UK, began trialling the use of student support app The Student Voice. Available on school tablets, pupils can use the app to report incidents that made them feel vulnerable, such as bullying (source: BBC). The app helps to safeguard children by removing barriers to reporting issues by creating a virtual safe space and is a positive use of digital tools to support Gen Alpha.



Left to right: Roblox, US; Elf Up! by Elf Cosmetics, US; The Student Voice, UK

Technology



Explore with Alexa

While **67%** of parents feel concerned about what their child is watching, they also understand the value of screens, with **65%** agreeing that they have the ability to foster creativity and communication

Source: BBC

Digital Habits: Digital Architects

Gen Alpha's early digital habits suggest their parents are helping them to form healthy habits with technology and are learning to balance the offline and online worlds.

Despite speaking to smart devices such as **Alexa** more than they speak to their grandparents, according to YouGov, and not knowing a world without smart televisions and iPads, Gen Alpha's digital habits suggest their parents are helping them to form healthy habits with technology and are learning to balance the offline and online worlds.

Almost half (46%) of 6–11-year-olds have active social media accounts despite minimum age limits on apps such as **Instagram** and **Facebook**, and more than half (54%) of Gen Alpha own a tablet (sources: YouGov, Morning Consult). Yet the popularity of games including **Fortnite**, **Roblox** and **Minecraft** among this age group indicates a shift in digital habits – Gen Alpha are using gaming to socialise and express creativity, rather than losing hours to doomscrolling.

For the time being, Gen Alpha are also at an age where gaming devices, iPads, televisions and cinemas appear more enticing than mobile phones and social media. Almost one-third of 8–11-year-olds visit the cinema monthly, and watching television or films is Gen Alpha's most popular weekend activity (59%) (source: GWI).

Parents are similarly optimistic about Gen Alpha's digital habits. About two in five (41%) parents of Gen Alpha say online games have had a positive impact on their children's socialisation, while data from GWI suggests that Alphas are more likely to see their friends in person over the weekend than speak to them online (sources: Morning Consult, GWI).

This healthier online-offline relationship provides opportunities for brands to explore phygital (physical experiences with digital elements) experiences, re-inventing entertainment for the next generation.

Case Studies

Bratz World

In October 2023, MGA Entertainment launched an in-store Bratz World augmented reality experience in the US supermarket group Walmart. By scanning a mobile-friendly QR code only available in-store, shoppers could enter a 360-degree virtual Bratz World, and get access to a Bratz doll photo filter.



House of Hype

At the end of 2023, phygital theme park House of Hype opened in The Dubai Mall, UAE. Designed by HyperSpace, the 'future-forward' theme park mixes physical and digital elements such as gaming to create a new genre of third spaces for Gen Alpha in a bid to revive footfall in shopping malls in the process.

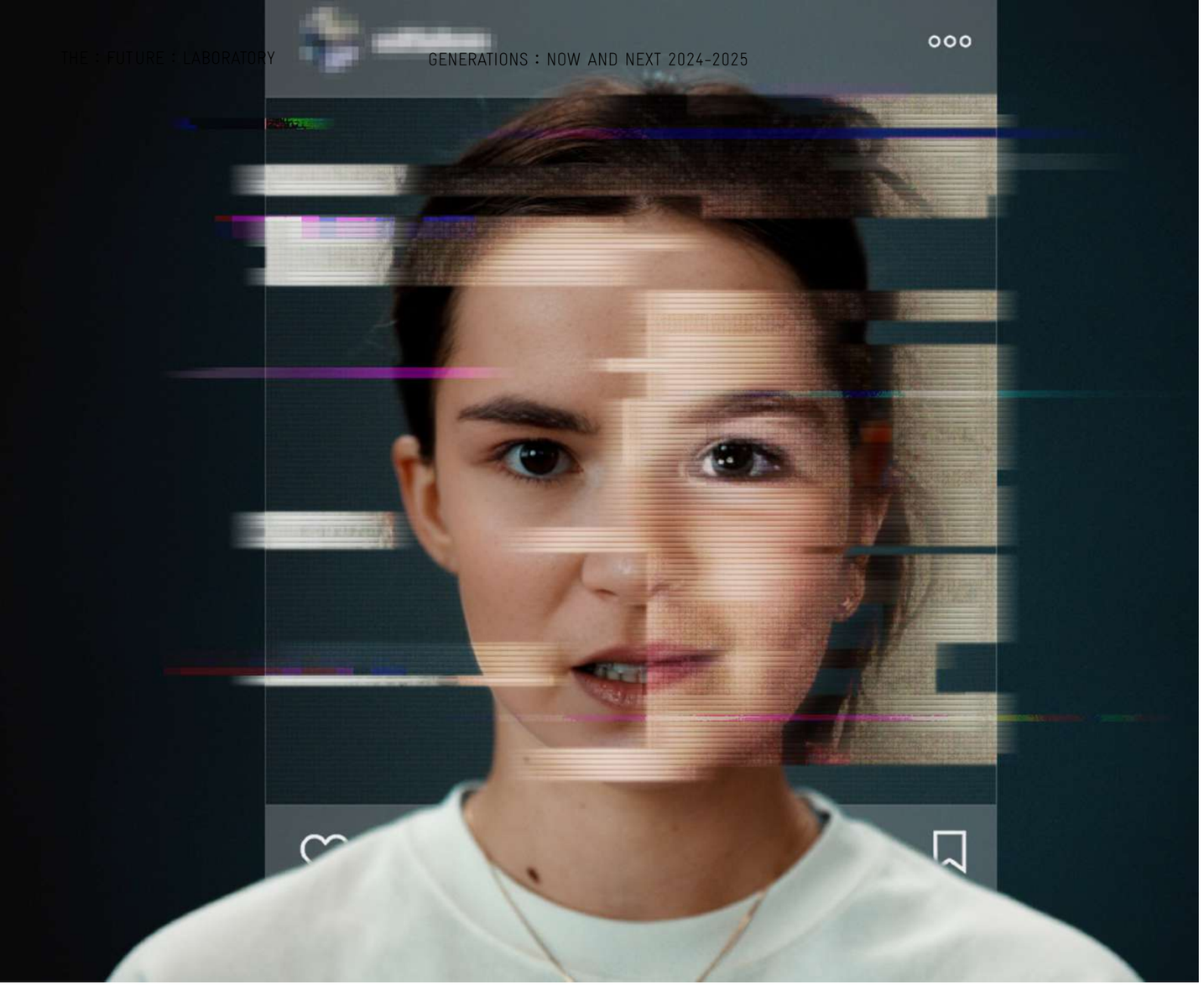


Curio

At the end of 2023, singer Grimes and Curio announced the launch of interactive AI soft toys that can converse with, and learn the personalities of, its owner. The three characters are voiced by Grimes and provide a way for children to have endless conversations with AI without spending time staring at a screen.



Left to right: Bratz collaboration with Kylie Jenner, US; House of Hype, Dubai; Grimes and Curio, US



Left to right: Share With Care by Deutsche Telekom, Germany; *Kidfluencer Starterkit* by Doortje Smithuijsen and Joep van Osch, The Netherlands

Media: Big Tech Backlash

As Gen Alpha begin to show interest in social media, parents are looking to brands, policymakers and the creator economy to help make the internet a better, safer place.

Safety on the internet is a complicated subject for parents of any age group. Big tech has recently faced scrutiny after a study revealed that in 2022, social media platforms made nearly £1.6bn ($2bn, €1.8bn) in ad profits derived from users aged 12 or under (source: Harvard).

Across six major social media platforms, the 2022 annual advertising revenue from youth users aged 0–17 was nearly £8.8bn ($11bn, €10.2bn) (source: PLOS). Unsurprisingly, 51% of Alphas first hear about brands through **YouTube** videos (source: Razorfish).

In October 2023, attorneys general in 33 US states filed a federal lawsuit against **Meta**, claiming the company is harming young users on **Facebook** and **Instagram** by using highly manipulative tactics to sustain engagement and collect personal information for advertisers, without parental consent. More recently, in January 2024, internal Meta documents which were made public showed that the company estimates that about 100,000 children using Facebook and Instagram receive online sexual harassment each day (source: Meta via The Guardian).

A 2023 Girlguiding survey found that almost one-fifth (19%) of girls aged 7–10 reported that comments were made to them about their bodies online, which has more than doubled from 8% in 2016. A quarter of girls aged 7–10 reported experiencing online bullying.

About **100,000** children using Facebook and Instagram receive online sexual harassment each day

Source: Meta via The Guardian



Case Studies

Deutsche Telekom

In 2023, German telecommunications company Deutsche Telekom hired creative agency adam&eveBERLIN to create a campaign highlighting the risks parents face when sharing photos and videos of their children online. The#ShareWithCare campaign features A Message from Ella, in which a deepfake of a nine-year-old girl warns against failing to safeguard children's digital identities.



BBC

In 2023, the BBC partnered with London-based animation studio Blinkink to produce an animated short film, The Square Eyed Boy. Running for 60 seconds, it follows an animated young boy whose eyes have turned square due to excessive screen time. Although initially distressed by his new eyes, the boy soon realises that screens, when used responsibly, can be a great tool for learning. The film closes with the tagline 'Screens, it's what's on them that counts'.



Left to right: Share With Care by Deutsche Telekom, Germany; The Square Eyed Boy by BBC, UK

Health and Wellness

One in five British children aged eight to 25 have a probable mental health condition

Source: NHS

Faces of Travel by Delta Air Lines and Adobe, US

Health: Anxious Alphas

In the past, parents worried about their children and the danger of drugs and alcohol or unwanted teenage pregnancies. Nowadays, four in 10 US parents with children under 18 report being 'extremely' or 'very worried' about their children's mental health (source: Pew Research Center).

Their concerns aren't unwarranted. The number of girls in the UK who describe themselves as 'very happy' has decreased from 40% in 2009 to 17% in 2023, the steepest decline of which was identified in girls aged 7–10 (57% in 2009 compared to 28% in 2023) (source: Girlguiding). Meanwhile, a record 496,897 under-18s were referred for treatment under Child and Adolescent Mental Health Services at the end of November 2023, up from 493,434 the month before (sources: NHS, The Independent).

An increase in mental health disorders among Gen Z and Millennials during the pandemic has had a knock-on effect on Alpha children too. 'Parental mental health difficulties during the first lockdown were related to infants' regulation skills and their ability to calm down,' explains Dr Gonzalez-Gomez, whose research at the Oxford Brookes **Babylab** also revealed that boys are more affected by parental mental health than girls.

Rachele Harmuth, head of the ThinkFun division of toy manufacturer **Ravensburger** along with resilience expert and family physician Deborah Gilboa are looking to the toy industry for solutions to this crisis in mental wellbeing. They have formed Mesh, a mental, emotional and social health taskforce to encourage the toy industry to invest in toys designed for emotional resilience. Aiming to launch accreditation in 2024, the Mesh label will be applied to toys meeting eight criteria.

As Gen Alpha reach their tween and teen years, mental health will continue to be a growing concern for parents.

Case Studies

Gryt

Skincare brand Gryt launched in 2023 as a 'youth empowerment brand disguised as personal care'. As well as selling tween skincare products such as a moisturiser and cleanser, Gryt's website includes a 'learn' page that tackles common questions around puberty and emotions, such as 'Why do I feel moody all the time?'. Gryt also has a Youth Advisory Council of eight high school teenagers.



Mr Men Little Miss

In November 2022, the book series Mr Men Little Miss collaborated with clinical psychologist Dr Elizabeth Kilbey on a collection exploring children's emotional wellbeing and mental health. In 2023, six new titles were added to the Discover You series, including Find Calm and I Am Angry. Each book includes engaging questions to encourage conversations on different topics.



Shaping Us

At the beginning of 2023, Kate Middleton (the Princess of Wales) and the Centre for Early Childhood launched an awareness campaign in the UK to increase public understanding of the first five years of a child's life. Shaping Us hopes to educate adults on how best to support children during these formative years to ensure they grow up to be happy, well-adjusted adults.



Left to right: Gryt, US; Mr Men Little Miss and Dr Elizabeth Kilbey, UK; Shaping Us, UK

Leisure: Collective Youth

The first few years of Gen Alphas' lives may have been filled with more screen time than soft play, but following in the footsteps of their Gen Z parents and siblings, Alphas are indicating an appetite for in-person socialising to make up for valuable time lost to the pandemic.

Since 2021, there's been a 10% drop in parents saying their child spends a lot of time on their devices, and Gen Alpha are more likely to say they see their friends (43%) than talk to them online at the weekend (39%) (source: GWI). They're even reviving in-person retail, with nearly half (47%) of these youngsters preferring to spend money on the high street than online (source: **Beano Brain**).

During the pandemic 'children were not able to take risks, socialise with their peers, or choose when, where and how to play,' says Melanie Pilcher, quality and standards manager at the **Early Years Alliance** educational charity. Missing out on these social experiences means that many children are behind and will find it harder to make friends in the future.

Parents are consequently looking to social collectives such as **Girlguiding** and **Scouts** to help their children develop social skills outside of school. Since 2021, Girlguiding – the UK's largest girl-only youth organisation – has experienced a 20% increase in young memberships and the highest number of young member enquiries since 2015 (source: Girlguiding).

Meanwhile, 42,000 young people are currently members of Scouts – a social youth organisation with an emphasis on outdoor activities. In 2022, the organisation saw the biggest youth membership growth since World War Two, following the pandemic (source: Scouts).

The pandemic might have narrowed the world for Gen Alpha, but now they are ready to get outside and explore it.





Left to right: Girl Scouts USA rebranding by Collins, US; Air Max 270 Go, Europe

Gen Alpha are more likely to say they see their friends than talk to them online at the weekend

Source: GWI

Case Studies

Squirrels

In September 2021, Scouts launched Squirrels, a social organisation for children aged four or five. As of 2023, 953 Squirrel Dreys have opened across the UK, following a programme carefully designed to help Alphas catch up and develop key skills such as teamwork, communication, creativity and community awareness.



Rainbows

The biggest membership growth for Girlguiding in the UK has been in its offering for its youngest participants, Rainbows. Girlguiding reduced the minimum joining age from five years to four in 2022, 'which we believe is a likely cause of this growth', a Girlguiding spokesperson told LS:N Global.



Left to right: Squirrels, UK; Rainbows, UK

Community and Identity



61% of US parents with children aged three to five say they are likely to buy gender-neutral toys during the holiday season

Source: Statista

Relationships: Mini-Millennials

Compared to just one-quarter of Gen X parents, 34% of Millennial parents planned and researched when would be best to have children, and just under half (47%) read up and selected a parenting style before having children, a figure that rises to 54% for Millennial dads (source: Beano Brain).

Often described as 'mini-Millennials' due to their majority-Millennial parents, Gen Alpha are growing up eating healthy and planet-conscious foods and playing with sustainable toys.

In the US, 61% of parents with children aged three to five say they are likely to buy gender-neutral toys during the holiday season, signalling an evolving approach to educating children about gender and identity (source: Statista).

Parents are also looking to the toy industry for solutions to excessive screen time. In 2023, The Toy Association ranked 'back to basic' toys that encourage good habits such as mindfulness or good sleep hygiene as their number one trend to watch for the coming year.

A 2023 King's College London and Mattel UK study found that playing with analogue train toys encourages collaboration that can help foster essential social skills such as communication, negotiation and turn-taking.

Promoting emotional intelligence and educating children about sustainability through play has become a priority for parents when it comes to leisure time. As Gen Alpha grow into their buying power, demand for ethical and inclusive toys will only increase.



Left to right: Mr Porter and Arket, Europe; Little Spoon Lunchers, US

Case Studies

Mattel

In April 2022, entertainment manufacturer Mattel launched the company's first carbon-neutral toys. Each Mega Blok Green Town playset is made from a minimum of 56% plant-based materials and 26% bio-circular plastics, and is certified as Carbon Neutral. Mattel has also pledged to achieve 100% recycled, recyclable or bio-based plastic materials in all products and packaging by 2030.



The Lego Group

The Lego Group expanded its Friends characters in 2023, aiming to be more representative of the world that children inhabit. Lego collected data indicating that three in four children feel that there aren't enough toys that represent them. The new characters have limb differences, Down Syndrome, anxiety or vitiligo, and represent a wider range of skin tones and cultures.



House of RoRo

New York design studio House of RoRo is pushing the boundaries of play with its line of multifunctional kids' furniture. Launched in 2023, the designs are like life-size puzzle pieces, encouraging the child to be involved in their assembly. Sustainable, playful and practical, the furniture is adaptable, gender-neutral and designed to appeal to parents' aesthetic tastes and children's curiosity.



Left to right: Mattel, US; The Lego Group, Denmark; House of RoRo, US

Sustainability

Individual: Conscientious Consumers

Empowered by their parents, Gen Alpha are already exhibiting signs of being conscientious consumers, seeking out brands that have a positive impact on the planet.

'Climate is the context of Gen Alpha's formation,' says Joe Waters, co-founder and CEO of children's policy think tank **Capita**. 'This generation are not going to have known a world without extreme weather. That's going to be normal for them.'

While this could easily lead to apathy towards the climate, empowered by their parents Gen Alpha are already exhibiting signs of being conscientious consumers, with 66% wanting to buy from brands that have a positive impact on the world (source: VML).

They aren't afraid to call out others for their eco-failings either: 35% of Alphas have asked someone to pick up their litter and 26% have encouraged an adult to change their behaviour to take better care of the planet (source: Beano Brain).

More than three-quarters (79%) of Gen Alpha also believe that it's crucial to study the climate emergency (source: Brainly); however, only 45% are satisfied with school sustainability education (source: EY). Educational bodies, parents, brands and governments must all meet this generation half way to help truly make a difference and protect them from eco-burnout.

From food to clothes and toys, Gen Alpha's brand maturity and purchasing power over their parents will put pressure on businesses to rapidly produce sustainable solutions to existing products in the coming years.



Photography by Karolina Grabowska, Poland

66% of Gen Alpha want to buy from brands that have a positive impact on the world

Source: VML

Case Studies

Clif Kid

In April 2023, Clif Kid – the children's iteration of the popular US plant-based energy snack Clif Bars – became the first kids' snack bar to be Climate Neutral Certified. To celebrate the certification, the snack brand partnered with Climate Kids to create a resource bank on the Clif website, providing small actions families can take to help protect the planet.



The Toy Loan Company

British teacher-turned-entrepreneur David Riley set up the Toy Loan Company in 2023 after realising how many toys his children had, but didn't play with. The subscription-based business offers a monthly toy box for babies, toddlers or children. Any unwanted toys can be sent back, sterilised and sent to someone else, while favourite toys can be kept for as long as the child wants.



Left to right: Clif Kid, US; The Toy Loan Co, UK

Foresight

Here, we expand on speculative future scenarios to 2030. Building on the Insight section, Foresight delves into what's possible: new directions, divergences or developments. For Gen Alpha, we explore how the world will change to meet their adolescence



Quarter-life Extension

As the world embraces longevity, the parameters of childhood and adolescence must be redefined to align with an ever-evolving demographic landscape.



Cyber-Curriculums

The education system is facing a generative AI revolution in edtech which will allow teachers to expand their pastoral responsibilities.



Metamorphosing Brands

Fostered by constant digital exposure, Gen Alpha's brand maturity provides a unique opportunity for brands to evolve alongside them.



Ethical Influencers

As the oldest Gen Alphas prepare to officially join social media, is a new, philanthropic genre of influencer about to appear?

‘In 2050, we could see the mainstream use of artificial wombs for alternative reproduction’

Lisa Mandemaker, speculative artist at Dutch Design Week



What is Foresight?

Foresights examine speculative scenarios 5–10 years in the future. Building on the Insight section, they showcase new directions, divergence or developments



EctoLife is a conceptual artificial womb facility created by biotechnologist and film producer Hashem Al-Ghaili, Germany

Quarter-life Extension

As the world embraces longevity, the parameters of childhood and adolescence must be redefined to align with an ever-evolving demographic landscape.

Society is increasingly pursuing longevity lifestyles and, as a result, lifespans will extend and traditional life stages will be renegotiated. Instead of considering young people living at home longer and having children later as ‘delayed adulthood’, the parlance will shift to ‘elongated childhood’.

If humans are commonly living to 100 years, what is the hurry to take on responsibility at 18?

Advances in egg freezing and the development of artificial wombs may accompany this shift, allowing women to reproduce into their mid-life so they can have character-enriching experiences in their 20s and early 30s; it also provides a solution for non-conventional and LGBTQ+ families wishing to have children. According to **MIT** Technology Review, artificial wombs are nearing human trials in the US (for now, the focus is on creating a womb-like environment in which extremely premature babies can develop for additional weeks).

Shifting the parameters of life stages will have legal and ethical ramifications, and there will also be opportunities for brands to define and support them. In April 2023, co-living developer **Folk** opened Florence Dock in south London, the company’s third development in 12 months. Modelled on university dorms, spaces such as this might offer a solution for quarter-lifers.

Cyber Curriculums

The education system is on the brink of a technological revolution. Driven by generative AI, this uptick in edtech will allow teachers to expand their pastoral responsibilities.

As the youngest of Gen Alpha reach school age, the education system will have to adapt to accelerate their cognitive and social development and to support parents who are struggling financially or mentally. At the end of 2023, the UK's leader of the opposition Keir Starmer called for supervised toothbrushing to be introduced in British primary schools following data showing the biggest cause of hospital admissions for children up to the age of 10 is tooth decay.

To provide teachers with the capacity to take on these types of pastoral responsibilities, the education sector must implement artificial intelligence technologies to write lesson plans and handle other administrative tasks. In October 2023, the UK government invested £2m ($2.5m, €2.3m) in the online classroom and resource hub Oak National Academy to provide teachers with personalised AI planning assistants.

Already, 60% of US and 46% of UK school students are provided with an electronic device from school (source: Qustodio). These numbers will increase as the edtech industry receives more investment in the coming years, leading to the further integration of technology into Gen Alpha's schooling to fully capture these tech natives' attention.

Labster, for instance, is a virtual lab and interactive science edtech platform that enables students to conduct virtual experiments. In September 2023, the start-up surpassed 6m users (source: Business Wire). Meanwhile, Cartwheel, a telehealth start-up for schools, raised £15.7m ($20m, €18.4m) in October 2023. Founded in 2022, Cartwheel matches schools in five US states with mental health professionals who can meet students virtually.

As explored in our Baby Boomers report, traditional educational journeys will also be reconsidered over the course of the next few decades. Longer, healthier lives will inspire societies to embrace a model of life-long learning, where formal education is continuous rather than curtailed to childhood and adolescence.

'60% of US and **46%** of UK school students are provided with an electronic device from school'

Source: Qustodio



My First AI by Modem Works imagines a future when children will learn from intelligent, personalised tutors. Imagery by Wang & Söderström, Amsterdam



Left to right: Vans World and Gucci Town; Fendi Kids

‘**A quarter** of children **aged 5–13** use virtual reality devices weekly’

Source: The Institution of Engineering and Technology (IET)

Metamorphosing Brands

Gen Alpha’s constant exposure to digital advertisements has created a generation of young children with brand maturity beyond their years. Brands that truly understand Gen Alpha and the context of their development have the opportunity to evolve alongside this generation and form life-long brand affinity.

Luxury brands are already investing in this long-term return on investment by launching metaverse activations and stepping into the virtual spaces where Gen Alpha spend most of their recreational time (source: IET).

Gen Alpha are years away from being **Gucci’s** target demographic, yet the luxury fashion brand has built an immersive Gucci Town on **Roblox**, and in April 2023 launched a collaboration with footwear brand **Vans** on a pair of virtual shoes available only on the platform. While this activation is unlikely to generate any revenue from Alphas for the time being, Gucci Town will establish brand familiarity among the next generation of consumers.

In September 2023, **Pizza Hut** also entered the metaverse with the launch of a Pizza Hut world in which gamers can dress their avatars in pizza-themed costumes and play mini-games. The activation was accompanied by a family pizza and sides deal in physical pizza hut restaurants in the Middle East. The campaign cemented brand affinity with game-loving Gen Alpha and generated profit by following through with an in-person promotion.



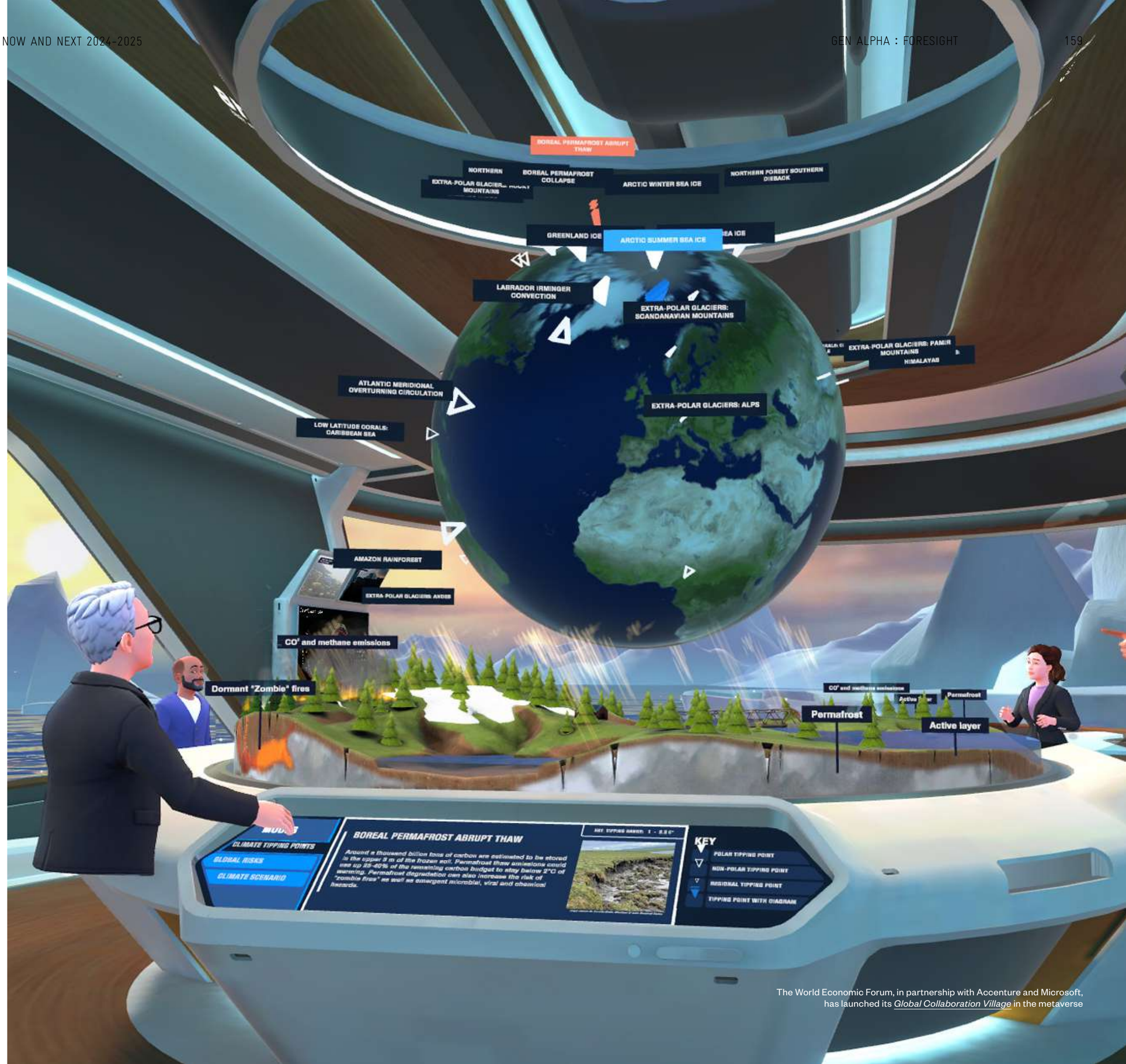
Ethical Influencers

As the oldest Gen Alphas prepare to officially join social media, is a new, philanthropic genre of influencer about to appear?

In 2026, the oldest Gen Alphas will celebrate their 13th birthday and officially join social media. Raised by parents eager to safeguard their children on the internet, this sudden influx of Alphas has the potential to break the internet as they tear down social media and rebuild it as a space for activism, community and positive influence.

We've seen the reach of Gen Alpha influencers already: 12-year-old Ryan Kaji's **YouTube** channel Ryan's World – aimed at under-10s – has 36.3m subscribers. In 2021, Kaji made £25.6m ($30m, €27.6m) in revenue by reviewing toys and doing DIY science experiments (source: Forbes). Gen Alpha also rank **TikTokers** and YouTubers as having the most influence for stimulating ideas (51%), compared to drawing and writing (36%), reading (33%) and playing with toys (26%) (source: Visa).

As they enter adolescence and the seeds of eco- and social consciousness that their Millennial parents have spent years planting begin to flower, Alphas will create a new genre of influencer. More akin to Greta Thunberg than Kylie Jenner, they'll partner with ethical brands, promote sustainability, bust fake news and influence others to stand up for what they believe in.



The World Economic Forum, in partnership with Accenture and Microsoft, has launched its *Global Collaboration Village* in the metaverse

Strategic Implications

Our Strategic Implications are actions and future considerations for brands and businesses to contemplate


Cloud Play and Cloud Sky by On, Switzerland

Strategic Actions



Betterverse 2.0

Brands, charities and non-profit organisations with a do-good agenda should take inspiration from Gucci and Pizza Hut and enter digital spaces such as Roblox to connect with Gen Alphas who can buy into their cause and enact positive change in the future



Alphafluencers

The next generation of content creators are emerging from Gen Alpha now. Consider partnerships with young alphafluencers to provide unique perspectives and future-proof businesses as Gen Alpha's spending power builds



Gamify your brand

Alphas are growing up on a steady diet of Roblox and Minecraft. Gamify your brand offering, loyalty system and marketing to capture the attention of these tech-native tweens

Left to right: The World Economic Forum, in partnership with Accenture and Microsoft; Photography by Karolina Grabowska, Poland; Cloud Play and Cloud Sky by On, Switzerland

Thought-starters



Gen Alpha are empathetic tech natives. How can you dig into the intersection between emotions and technology to speak to their feelings?



As Gen Alpha join social media at 13, their interests and brand affinity are likely to mature fast as they consume content from creators of all ages. How can you adapt your brand offering for tween consumers?



Adolescents embracing an extended quarter-life want a taste of independence without sacrificing childhood security. How can your brand make this cohort feel seen?

Left to right: Photography by Julia Cameron; My First AI by Modem Works. Imagery by Wang & Söderström, Amsterdam; Photography by Norma Mortenson

Methodology

Strategic foresight is the most valuable tool you can adopt to identify future prosperity. Despite our reputation for getting it right, we can't predict the future. There is no crystal ball.

However, our methodology enables clients to interpret and frame all their decisions about future risk within a brand, consumer or organisational context that is provable, practical and minimises uncertainty.

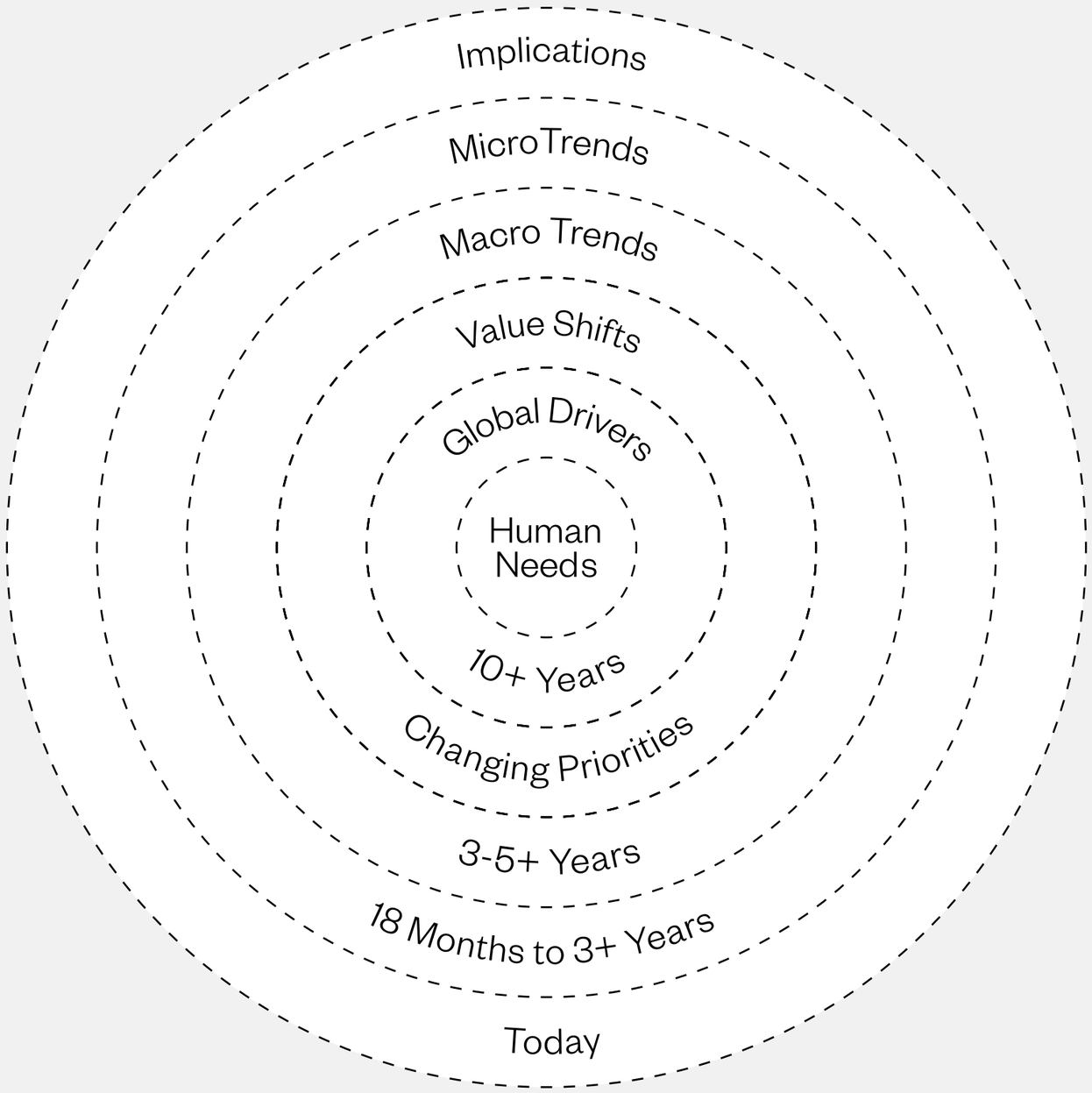
We do this by understanding the influence of six global drivers causing profound, consistent – and therefore relatively predictable – change.

Their impact is assessed against seven core human needs and the ensuing value shifts that change consumers' attitudes and behaviours.

This leads us to identify emerging macrotrends and microtrends, and ascertain what their implications are for the future landscape



Lab Meta for The Future Laboratory



The Future Laboratory's proprietary foresight methodology

Methodology: Foresight Process

At the heart of The Future Laboratory is a unique proprietary methodology that allows us to determine, define and track the key drivers of change affecting the future. We do this by tracking:

Human Needs : Universal

The foundation of our society based on a value system that supports human nature's physical and emotional programming.

Global Drivers : 10-year+ Horizon

Key global drivers represent the cultural, social, economic, political, technological and environmental eventualities reshaping the world we live in.

Value Shifts : Ever-evolving

The new ways in which we strive to meet these human needs, shaped by our contemporary context.

Macrotrends : 3–5 years+ Cultural and Societal Shifts

The cultural manifestations of new and emerging attitudes worldwide as shown by the behaviours of innovators and early adopters.

Microtrends : 1–3 years+ Lifestyle

Specific and tangible business innovations already emerging across key lifestyle categories

Access to **LS:N Global** provides our members with a thorough understanding of consumer evolution. You will have continual access to our Generations resource, which is updated regularly.

Read more about Generations on **LS:N Global**



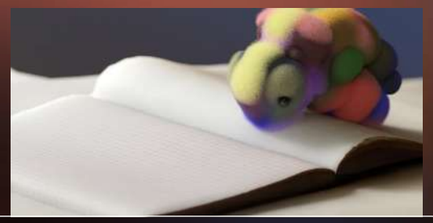
Reading Raves

Communal reading events are attracting young consumers for their unique blend of socialising and serenity.



The Great Wealth Transfer

Wealth ownership, distribution and the politics that influence cross-generational spending are all in flux, according to the latest findings of The Future Laboratory's Great Wealth Transfer report.



AI Edu-play-tion

Meet the innovators using generative artificial intelligence to re-imagine screen-free educational play time for children.

Not a member yet?

Sign up or book a demo now

Left to right: Modern Home by Rob Christian Crosby, New York, US; AI imagery by The Future Laboratory; My First AI by Modem and Wang & Söderström, The Netherlands

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The Future Laboratory is one of the world's foremost strategic foresight consultancies. Members of our trends intelligence service LS:N Global get exclusive access to the mindsets defining tomorrow and the early adopters driving global change across ten industry sectors.

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