

# EURO KIDS

THE SINGLE YOUTH  
OF THE SINGLE MARKET

by Simon Silvester



# EUROKIDS:SUMMARY

## ENGLISH

- 1 Older Europeans remain split by national identities and widely differing tastes. They will *never* become a single market. (p.4)
- 2 Meanwhile, young people around Europe-the **Eurokids** of the 1990s - are **increasingly one nation**. (p.6)
- 3 80% of them learned English at school, and 66% claim still to speak it. English is becoming the **lingua franca** of European youth. (p.7)
- 4 Amongst Eurokids, the North/South divide is going. Young Latins are leaving their extended families. And when they do, they switch from mum's local dishes to the pan European youth diet of **chips and frozen pizza**. (p.8)
- 5 In addition, young women all around Europe are all delaying babies. (p.9) *The same social forces drive their lives.*
- 6 Politically, Eurokids are much **more pro European** than their parents. (p.11) *Maastricht mentality is the future.*
- 7 They are also **less American led** than previous youth generations. (p.12) The clothes they buy are European. The style capital is the new European LA: Barcelona.
- 8 And besides, as far as Eurokids are concerned, everything new and exciting no longer comes from America. It comes from **Japan**. (p.13)
- 9 How much will *older* Europeans see of this new culture? Very little, because it will be hidden away on MTV, and other youth only media. In the nineties, European youth media is going **underground**. (p.14)
- 10 Meanwhile, the kids in the East look on enviously. (p.20) When the Iron Curtain fell, the freedoms they wanted were the freedoms to **own a colour TV, drive a car and fly the world**. *But 500 zlotys a week don't buy you much BMW.*
- 11 When all's said and done, Eurokids are a **ripe target market**. (p.18) They are disloyal to their national brands, thirsty for new ideas and have the money to buy into them.
- 12 Marketeers who understand that the medium is the message, that American imagery is no longer enough and that **corporate ethics count more than a few pfennigs off**, will succeed in cracking them. (p.22) The others won't.

## FRANÇAIS

- 1 Les européens plus âgés resteront divisés par leurs identités nationales et leurs goûts largement différents. *Jamais* ils ne constitueront un seul marché. (p.4)
- 2 Pendant ce temps-là les jeunes gens, **les Eurokids** des années 1990, vont petit à petit former une seule nation (p.6).
- 3 80% parmi eux apprennent l'anglais à l'école, et 66% le pratiquent. L'anglais deviendra **la langue universelle** de la jeunesse européenne (p.7).
- 4 Parmi les Eurokids il existe une scission entre le Nord et le Sud. Les jeunes latins quittent leurs familles nombreuses. Et quand ils le font ils passent de la cuisine de maman à la nourriture transeuropéenne genre **frites et pizzas surgelées** (p.8).
- 5 En plus, partout en Europe, les jeunes femmes retardent le moment d'avoir des enfants (p. 9). *Leur vie suit le même schéma social.*
- 6 Au niveau politique, les Eurokids sont beaucoup plus pro-européens que leurs parents. (p.11) L'esprit de Maastricht est l'esprit de demain.
- 7 Ils sont aussi **moins influencés par l'Amérique** que les précédentes générations. (p.12) Les vêtements qu'ils achètent sont européens. La capitale du style et du chic, le nouveau LA européen, c'est Barcelone.
- 8 Et d'ailleurs tout ce qui intéresse les kids en Europe, tout ce qui est nouveau et excitant ne vient plus des Etats-Unis, mais du **Japon**. (p.13)
- 9 Que verront les européens *plus âgés* de cette nouvelle culture? Pas grande chose, puisque elle sera cachée sur MTV et d'autres média jeunes. Dans les années 90 la jeunesse européenne se cache **underground** (p.14)
- 10 Pendant ce temps-là les enfants de l'Est les regardent avec envie (p.20). Quand le rideau de fer tomba, la liberté qu'ils voulaient était de **posséder un télécouleur, conduire une voiture et voyager dans le monde**. Mais 50 zlotys par semaine ne vous permettent pas d'acquérir une BMW pour autant.
- 11 Si tout ce qui a été dit se réalise, les européens seront un marché et **une cible mûre**. (p.18) Ils sont déloyaux vis à vis de leurs marques nationales, cherchent de nouvelles idées et auront l'argent pour se les payer.
- 12 Les professionnels du marketing qui comprennent que le medium est le message, que l'image de l'Amérique ne suffit plus et que **l'éthique de l'ensemble** comptera plus que quelques dollars, réussiront (p.22). Les autres non.

## DEUTSCH

- 1 Alteingesessene Europäer bleiben getrennt durch ihr Nationalbewußtsein und unterschiedlichste Geschmäcker. Sie werden niemals ein einheitliches Marktpotential bilden.(p.4)
- 2 Auf der anderen Seite jedoch verschmelzen die jungen Leute der neunziger Jahre, die **Eurokids**, mehr und mehr zu einer Nation (p.6).
- 3 80% von ihnen geben an, Englisch in der Schule gelernt zu haben. Weitere 66% behaupten, die Sprache zu beherrschen. Englisch wird immer mehr zur **Lingua Franca** der europäischen Jugend (p.7).
- 4 Unter den Eurokids schwindet die bisherige Nord-Süd-Trennung. Junge Südländer verlassen ihre Großfamilien und wechseln im gleichen Atemzug auch ihre Eßkultur, von angestammten traditionellen Gerichten hin zur Europa übergreifenden "Jugenddiät", bestehend aus **Pommes Frites und gefrorener Pizza**. (p.8)
- 5 Zusätzlich ist die Abneigung, Nachwuchs gegenüber, unter allen jungen europäischen Frauen gleichermaßen verbreitet. (p.9). *Die gleichen sozialen Kräfte sind für ihr Leben bestimmend.*
- 6 Politisch gesehen, sind die Eurokids **eher Pro-Europäisch eingestellt**, als ihre Eltern. (p.11) Maastrichter Denke ist die Zukunft.
- 7 Sie sind auch **weniger Amerika-orientiert**, als vorangegangene Generationen. (p.12) Sie kaufen europäische Kleidung und die Mode-Hauptstadt ist das LA Europas: Barcelona.
- 8 Soweit es die Eurokids betrifft kommen die Neuigkeiten eh nicht mehr aus Amerika, sondern aus **Japan**. (p.13)
- 9 Wieviel werden ältere Europäer von dieser neuen Kultur mitbekommen? Herzlich wenig. Sie läuft versteckt ab auf Kanälen wie MTV und anderen, ausschließlich für Jugendliche konzipierte Medien. In den neunzigern gehen die Jugendmedien **in den Untergrund**. (p.14)
- 10 Währenddessen befehligen sich die Kids im Osten als erwartungsvolle Beobachter. (pag 20) Als der eiserne Vorhang fiel, bedeutete Freiheit für sie, **eine Farbfernseher zu besitzen, ein Auto zu fahren und in der Welt herum zu fliegen**. Nur mit 500 Sloties in der Woche ist es ein weiter Weg zum BMW.
- 11 Nachdem alles gesagt und getan ist, sind die Eurokids eine **hochgradige Zielgruppe** mit einem enormen Markt. (p.18) Sie sind in keinsten Weise loyal zu nationalen Markenprodukten, durstig auf alles Neue und sie haben das nötige Geld es sich zu kaufen.
- 12 Anbieter, die verstehen, daß das Medium die Nachricht ist, daß amerikanische Bildhaftigkeit nicht mehr ausreicht und daß **einheitliche Ethik mehr bedeutet, als ein paar Pfennige zu sparen**, werden den Markt erfolgreich knacken (p.22). Die anderen nicht.

## ITALIANO

- 1 Gli Europei piu' anziani sono ancora divisi per singole nazionalità e con gusti molto differenti (p.4)
- 2 In contrapposizione, i giovani Europei, - gli **Eurokids** degli anni '90 - stanno diventando una nazione unica. (p.6)
- 3 L'Inglese sta diventando **la lingua ufficiale** dei giovani europei: l'80% lo ha imparato a scuola, mentre il 66% dichiara di parlarlo ancora. (p.7)
- 4 Fra gli Eurokids, la divisione nord-sud sta scomparendo. I giovani dei paesi latini, sempre piu' spesso, lasciano la famiglia, per andare a vivere da soli, cambiando le abitudini culinarie e passando ad una dieta a base di **patatine fritte e pizza surgelata** : la dieta dei giovani pan-europei. (p.8)
- 5 Le giovani donne europee inoltre, ritardano sempre di piu' il momento di mettere al mondo dei figli. (p.9) *Le stesse forze sociali guidano le loro vite.*
- 6 Politicamente, gli Eurokids, sono molto piu' pro-Europa dei loro genitori. (p.11) *La mentalità di Maastricht è il futuro.*
- 7 Gli Eurokids sono molto meno influenzati dall'America delle generazioni precedenti. (p.12) I vestiti che acquistano sono europei, la capitale della moda, la nuova Los Angeles, e' **Barcellona**.
- 8 Per i giovani, tutte le cose nuove e divertenti non vengono piu' dall'America ma dal **Giappone** (p.13).
- 9 Quanto di questa nuova cultura vedranno i vecchi europei? Molto poco, perche' verra' nascosto su MTV ed altri media esclusivamente per giovani. Negli anni '90, i media per i giovani europei stanno diventando sempre piu' **underground**. (p.14)
- 10 I ragazzi dell'Est guardano con invidia i giovani europei piu' fortunati. (p.20) Infatti, con la caduta del *Muro*, la libertà che volevano era **la libertà di possedere una TV a colori, di poter guidare una macchina e di poter volare per il mondo**. Ma con 500 zlotys alla settimana non si puo' acquistare molto di una BMW.
- 11 Quando tutto cio' sarà realizzato, gli Eurokids rappresenteranno **un vero target**. (p.18) Infatti, sono infedeli alle marche nazionali, hanno sete di nuove idee e hanno i soldi per soddisfarle.
- 12 Solo i manager e le aziende che capiranno che il media e' il messaggio, che le immagini americane non bastano piu' e che **l'etica corporativa e' piu' importante di uno sconto** avranno successo con i giovani. (p.22) Gli altri no.

## ESPAÑOL

- 1 Los europeos en edad adulta siguen divididos por sus identidades nacionales y unos gustos muy diferentes. Nunca formarán un mercado homogéneo (p.4).
- 2 Mientras tanto, la gente joven de toda Europa - los **Eurokids** de los 90 - son cada vez más una gran nación (p.6).
- 3 Un 80% aprendió inglés en la escuela, y un 66% afirma que lo habla. El inglés se está **convirtiendo en el idioma** de la nueva juventud europea (p.7).
- 4 Dentro de este colectivo de jóvenes europeos, se crea una división entre Norte y Sur. Los jóvenes latinos están "dejando" a sus familias. Y al hacerlo, cambian la "cocina de mamá" por una dieta de **chips y pizzas** (p.8).
- 5 Además, las jóvenes de toda Europa están retrasando su maternidad (p.9). *Las mismas fuerzas sociales guían sus vidas.*
- 6 En cuanto a la política, los eurokids son **mucho más pro-europeo s** que sus padres (p.11). La mentalidad "Maastrich" es el futuro.
- 7 Se dejan guiar **menos por los americanos** que generaciones anteriores (p.12). La ropa que compran es europea. La capital del estilo es la nueva Los Angeles europea: Barcelona.
- 8 Y además, en la medida que les interese, nada nuevo y excitante viene ya de EEUU, sino de **Japón** (p.13).
- 9 ¿Se dan cuenta las generaciones anteriores de esta nueva cultura? Muy poco, porque queda escondida en la MTV, y otros medios sólo para jóvenes. En los 90, los medios de comunicación propios de los jóvenes son **cada vez más exclusivos** (p.14).
- 10 Entretanto, los chicos del Este miran con envidia (p.20). Cuando cayó el telón de acero, la libertad a que ellos aspiraban se reducían a poder **tener una televisión en color, conducir un coche o viajar por todo el mundo**. Pero 500 zlotys a la semana no compran muchos BMW.
- 11 Cuando todo está dicho y hecho, los eurokids son ya **un target maduro** (p.18). No son fieles a las marcas nacionales, están sedientos de nuevas ideas y de tener dinero para comprarlas.
- 12 Los hombres de marketing que crean que el medio es el mensaje, que lo americano ya no es suficiente para vender o que **la ética corporativa** cuenta más que sus contrapartidas negativas, son los que se los ganarán (p.22). Los demás no lo conseguirán.

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# YOU CAN'T TEACH AN OLD DOG NEW TRICKS

A new Europe is emerging.  
*But older Europeans are not  
adapting to it.*

Across Europe, trade barriers are coming down, customs posts are disappearing and taxes are being harmonised.

In European boardrooms, the talk is of the Single Market and the single European consumer.

But are Europeans changing as fast as some would wish to think? Does the single European consumer *really exist*?

## **Herr and Señora Average**

Take the average European couple. They're on an average income, they're lower middle class and in their late thirties.

By and large, they're sticking to the national attitudes and tastes with which they have grown up.

*Herr Average* retains his liking for Schweinebraten and other traditional dishes.

*Mr Average* still sits down to roast beef on Sunday lunch and retains his liking for darker beers or 'ales'.

Even in less traditional areas, the differences remain great. 90% of British Mrs. Averages have a jar of instant coffee at home. In Italy, the figure is still only 15%.

## **What about Eurobrands?**

Of course, many people would argue that

'Eurobrands' - brands with the same appeal across the continent - already exist.

They would point out that brands such as BMW have a similar appeal to men in their thirties and forties from Düsseldorf to Milan.

But do they? According to BMW's München research centre:

*"However important harmonisation may be, the differences in culture, traditions and lifestyle which have grown up over the centuries will persist and we should be glad of that."*

KERN, WAGNER & HASSIS  
EUROPEAN ASPECTS OF A GLOBAL BRAND: THE BMW CASE,  
MARKETING AND RESEARCH TODAY

Do these differences affect BMW's European sales?

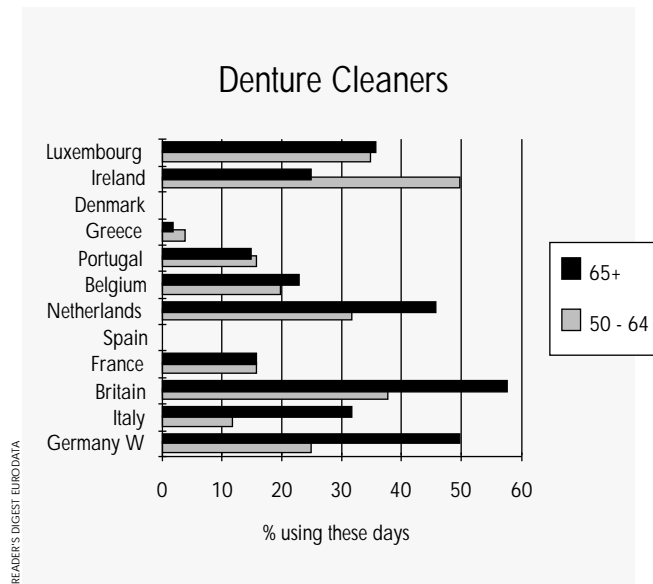
They do. Despite excellent pan-European marketing, 58% of BMW's sold within the EC are *still sold to Germans*.

## **Nej & Non**

It is also clear from the Danish and French reactions to Maastricht that rapid change in Europe is causing xenophobia rather than growing



**The attitudes of Europeans over 60 will *always* remain coloured by their war experiences. Is it therefore so surprising that those of us in our thirties and forties will always remain trapped within our own individual national identities?**



Another market that hasn't unified.  
Why can this be?

harmony.

According to the editor of Le Monde:

*"The French are starting to develop complexes again, about industrial competition, Japanese cars, a united Germany, immigrants, ghettos in the suburbs."*

JEAN MARIE COLUMBANI

It seems that the more we force the average European to be 'European', the more he or she fights against us.

### Gloom and Doom

Thus if you take the *average* European in his or her late thirties, the notion of the single consumer is meaningless.

Europeans are conservative. Whereas a middle aged American welcomes new ideas, Europeans tend to respect tradition, know what they like and stick with it.

The markets they participate in cannot really be called 'single'.

### Hope

But there are other markets - burgers, colas, perfumes, jeans for instance - where buying patterns vary little from European country to European country.

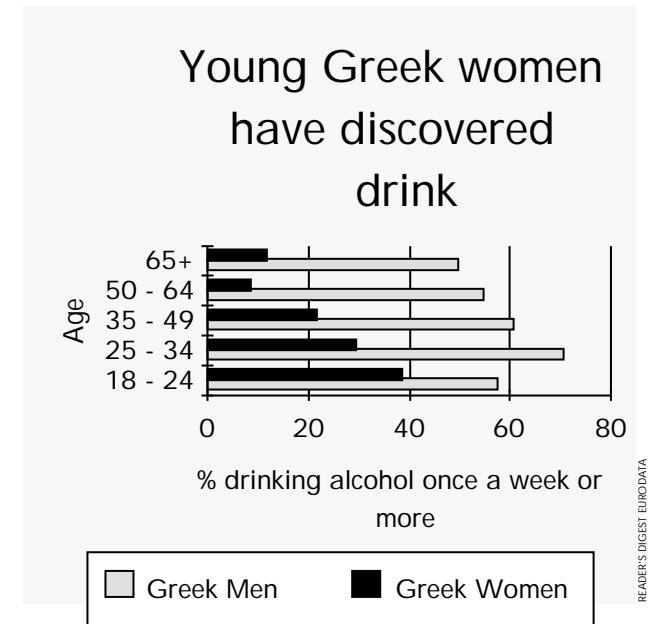
Adidas and Benetton sell using the same products and the same imagery from København to Barcelona.

So does Coke.

So does Orangina.

Could it just be coincidence?

Or is it that they are single European markets because they rely on young consumers who are *increasingly exactly the same?*



Alcoholic drinks for women are growing in Greece at the moment, not because Greek women are changing, but because the grannies who never touched the stuff are being replaced by a new generation of **party animal Eurokids**.

# ONE YOUTH NATION

*They eat the same food, they wear the same clothes, they do the same things. And increasingly, they understand the same language.*

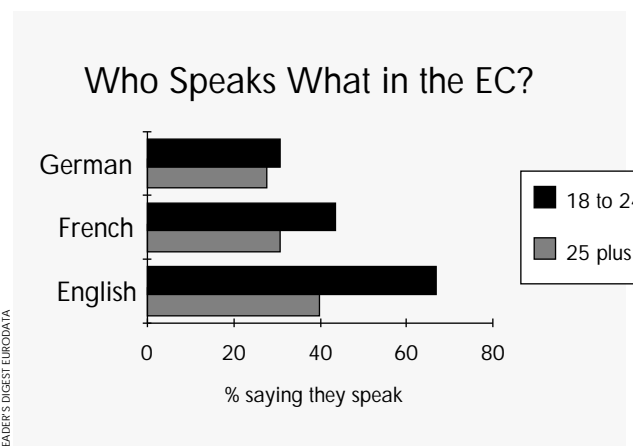
Whilst the over 30s remain secure within their national identities, and view other European countries as mere holiday destinations, the next generation are different.

## They all talk English

Whilst only 60% of the European population as a whole ever had the chance to learn a foreign language, the figure is now over 80% amongst young people.

The language they are learning above all is English.

English teaching is now so widespread and to such a level in Europe today that the vast majority of under 25s in *all* EC countries now speak Eng-



lish, and English has now become the lingua franca of European youth.

With serious job incentives for good English speakers, and increasing exposure to English language pan European media, it is likely that

English speaking across Europe may eventually reach the pattern in the Netherlands, where everyone speaks Dutch at home, but retains a good knowledge of English for work.

## They're getting out of their motherlands

Young Europeans travel more, a lot more than previous generations, aided by cheap youth travel with schemes such as Interail, and by education programmes designed to expose them to the new Europe of 1992.

Across Europe, young people take 40% more foreign trips than the adult population as a whole. In the 'new' European states of Spain, Portugal and Greece, the figure is more like 60%.

With a high disposable income and no children to spend it on, those in the pre-family age group have the income to travel further, being 40% more likely to have travelled *by air* in the past three years than the European population as a whole.

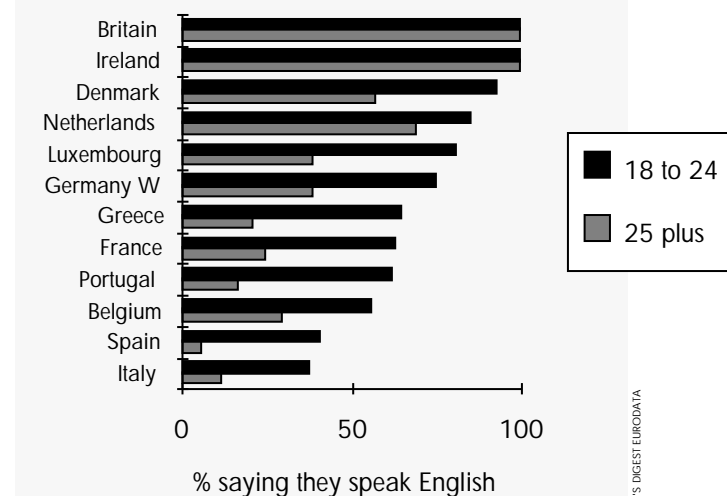
According to Eurobarometer, the EC public opinion measurement unit, a large proportion of young Europeans aspire to work in other EC countries. (The favourites are France, because of its lifestyle, and Britain, because of its reputation as a 'rock island'.)

*With the EC freedom of labour directives, this will be easier for them than ever before.*

## One lifestyle

Traditional European marketing has always drawn a strict dividing line between northern and southern Europeans in terms of lifestyle and mentality. For older Latins, this is still correct.

## Youth Speak English



But when you look at *youth* within Europe, the differences are fading rapidly.

Historically, the most important youth divide in Europe has been that in the North, young people have left home to live lives independent from their parents, whereas in the South, they have remained part of an extended family.

In the 1990's, this difference is disappearing:

## The Latin family is breaking up

For centuries, Southern European youth have stayed at home all their lives, with spouses moving in with the family.

In the 1990's, youth are no longer participating in this traditional Latin extended family arrangement.

According to Madrid's Centro di Investigaciones Sociológicas\*:

- In the past, the extended family home was essential for old and for young, because Latins were *poor*. Nowadays, as Latin *incomes are rising* to the EC average (Spain is already 80% of the way there), the economic logic of staying together as one family unit has disappeared.
- The extended family home made sense, because young Latins expect a close relationship with their parents. Nowadays, as *car ownership* rises, they can stay in close touch with their parents whilst living separately. (In 1969, only 30% of Spanish households had a car. Today the figure is 62%, close to the EC average of 69%.)
- Additionally, In the past, children were pressurised to remain at home to care for grandparents. With affluence, state pension care is growing in Latin countries, and care is seen less as a personal duty.

As a result, young people in Spain - and across the

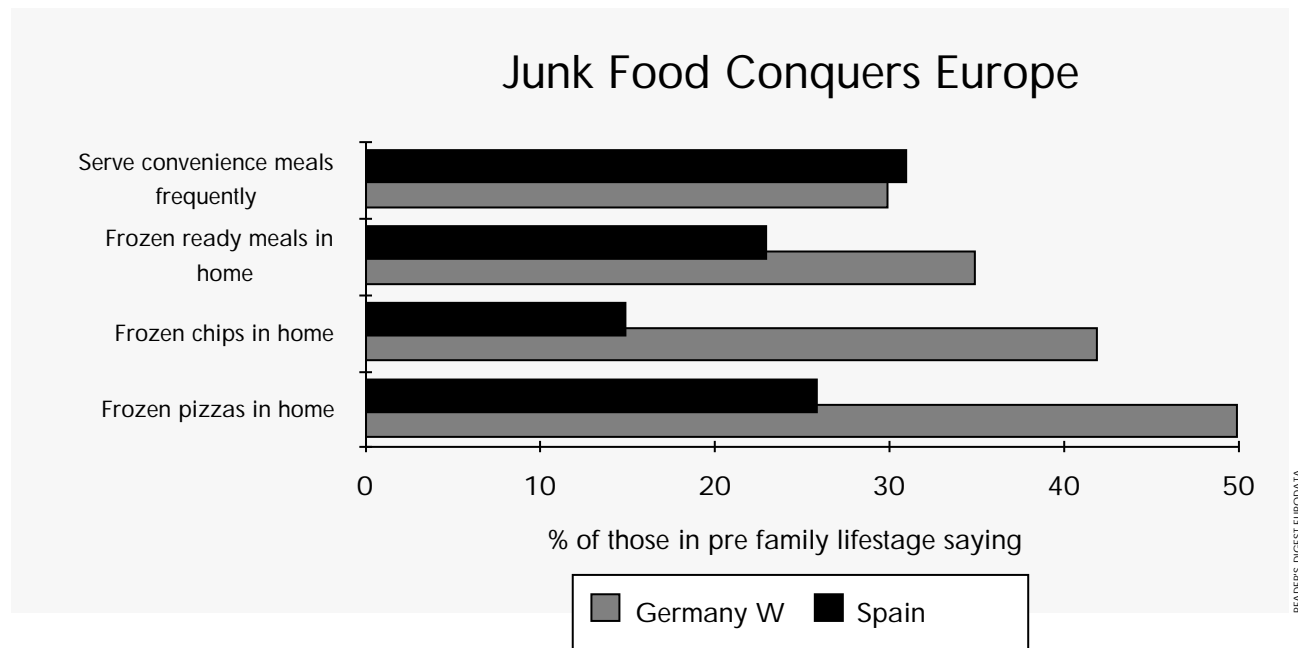
## I WANT TO BREAK FREE

% of EC 21 - 24s living at home

	male	female
Living with parents	62	49
Live alone	13	13
Live with boy/girlfriend	11	13
Live with spouse	8	19

Base circa 3,000 EC 21 - 24s  
Source: EC

Across Europe, girls escape the nest before boys.



rest of Southern Europe - are free to leave home and adopt Northern lifestyles.

*Increasingly they are doing so.*

### Why leaving home is important

When young Europeans leave home, all of the traditional, national tastes they acquired from mum's cooking are dumped.

Consider young people living apart from their parents in Spain and in Germany. Huge differences in income pattern, huge differences in style, but when it comes to diet, the Spanish are rapidly adopting the favourite dishes of German youth: *convenience meals, frozen chips and pizzas.*

According to Readers Digest Eurodata, a third of Spaniards in the young, pre-family lifestage serve convenience meals regularly nowadays. In the Spain of a decade ago, they were *unknown.*

### The metro singles lifestyle

In Northern Italian cities, youth lifestyles are changing even more rapidly.

Whilst 95% of Italian 15 to 24 year olds in rural areas still live with their parents until marriage, the figure in Milan is much lower.

There, and in Turin, the Northern European shared metro singles lifestyle is rapidly emerging.

In these cities:

- Young people are renting flats together.
- Cohabitation is increasingly the norm.

*Let them break free of their extended Latin family, and young Spaniards stop eating olives and defrost oven chips like everyone else.*

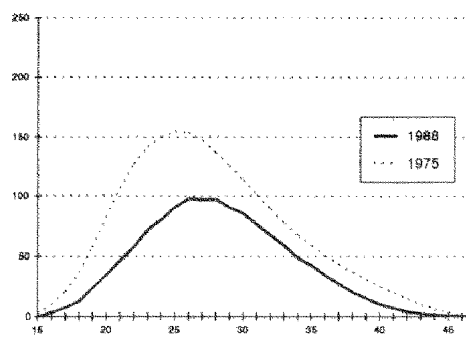
**'Young European women are increasingly the same'**

KLAUS MORWIND, HENKEL

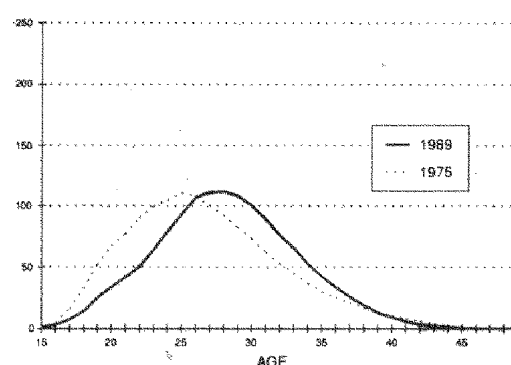
## Why get pregnant when you can get rich?

*Fertility Rates: (Live births per 1000 women of each age)*

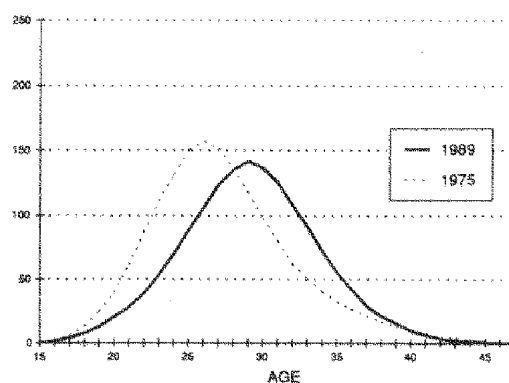
### Italy



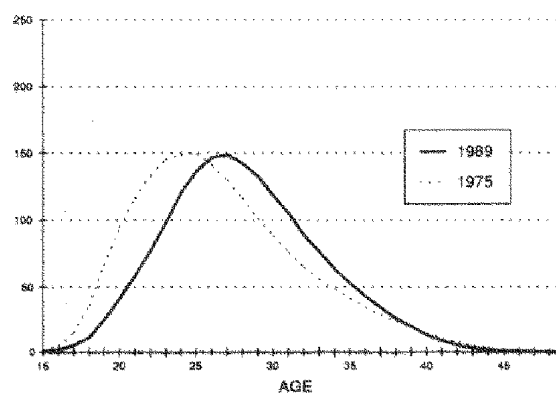
### Germany



### Netherlands



### France



*In these countries as in all other EC countries, the young women of the nineties are delaying getting pregnant. They seem to be driven by the same social forces.*  
Source: Eurostat

- Sex without marriage, once taboo all over Italy, is commonplace and accepted. Sex outside of conventional long term relationships is also growing.

Importantly, once they have the lifestyle, there is little difference between young northern and southern Europeans in their attitudes towards life, consumption and the future.

*All reject the traditional habits of their parents, all want an answerphone.*

### The same basic desires

European youth aren't just harmonising their lifestyles, they are also 'harmonising' some of the most important decisions they have to make in life: when to get married, or live together, and when to have children.

Statistical evidence shows that the patterns are changing rapidly, in *exactly the same way in all EC countries\**.

### I don't want to say 'I do'

As part of the move towards later parenthood, young Europeans are delaying marriage until later in life.

Between 1980 and 1989, average age of first marriage for women rose in Holland from 22.6 years to 25.6 years, and in Greece from 22.3 to 23.5 years.

This pattern is the same for all EC countries in both northern and southern Europe.

*Clearly, the same social forces are at work.*

### None of us want kids yet

Throughout Europe, as young women have been delaying settling down, the mean age of first motherhood has risen.

Again, according to figures published by Eurostat in Luxembourg, this pattern is the same for every state in the community.

A few decades ago, a young Italian woman would often expect to have four children in her lifetime - way above the EC average.

Things have changed so rapidly, that in 1992 it is impossible to distinguish childbirth patterns in Italy from those in the North.

### The same concerns

Thirty years ago, the youth agenda varied enor-

mously from country to country across Europe. Young Germans were into East vs West issues; young Britons were into little except rock and roll. Today, young people around Europe all worry about the same things.

According to surveys conducted by the European Commission, all are obsessed by sport and the problems of society; environmental issues, arts and pop concerts fill the youth agenda.

With green concerns, the only areas of difference across Europe are the particular local issues. In Italy, young people worry more about river pollution; in Germany, young people worry most of all about the effect of acid rain on forests.

### **One youth nation**

Clearly if young people are adopting the same lifestyles around Europe, making the same life decisions at the same time around Europe, and worry about the same thing around Europe, the idea of a single youth European nation is powerful.

But the question then remains to be asked:

Do they *want* to be Europeans?

## GREEN & SPORTRY

*% of EC 15 - 24s concerned by:*

Environment and nature	51%
Sports	46%
Social problems*	44%
Arts and Entertainment	39%

\* human rights, poverty, sexual equality

Base: 7600 15 - 24 year olds

Source: EC

*If you're looking for a presenter for your new pan-European advertising campaign, choose a hermaphrodite pole vaulter who's into rainforests and baby seals.*

# THE GREAT MAASTRICHT DREAM

*If the will of young people for political change reflects their need for social change, the single European consumer is one generation away.*

## **We all want to be Eurocitizens**

Whilst their parents moan about Maastricht, and whinge about the Germans on holiday, young Europeans have much more positive view of European institutions and EC policies. A full 78% think that their country should be part of the EC. *Even in Denmark and Britain, young people are much more positive about the EC than their parents.*

## **We're more pro Maastricht**

Whilst older Germans and the Britons question the role of the EC in social policy, and desire it to remain primarily an economic institution, research by Reader's Digest shows that young people are much more positive about its social aspects. Younger Europeans support disproportionately the growing role of the EC in Eastern Europe, along with subsidies to its poorer members.

## **We know more**

Fifteen years of EC influence on education has also left young people in Europe much more knowledgeable about the EC than their parents. Research by Readers Digest shows that 58% of 18 to 24 year old Spaniards know the EC has 12 members, compared with less than a third of Spanish over 50s.

Evidence from research into the 'No' result of the Danish referendum indicates that *lack of knowledge* of Europe is the biggest barrier to positive attitudes towards it

The level of understanding of Europe amongst young people thus offers strong evidence that their *political will to unify will grow* as they age.

## **A European identity**

Clearly, young people around Europe feel more comfortable than previous generations with a European political identity.

Perhaps one reason why this is true is because they are currently rejecting the image youth have worn for the past 30 years - the image of *America*.

***"I think we know too little about what the Union is about. Recently an experienced politician was unable to answer the most simple question regarding the consequences of the Maastricht treaty."***

ALICE LARSEN,  
DANISH HAIRDRESSER, ON WHY SHE VOTED NO.

***"Young people in many of Europe's countries are more in favour of building a united Europe than their parents' generation who set up the European Community in the 1950's. This is particularly true of the late joining nations such as Britain and Spain."***

DAVID BLAKE  
THE EUROPEAN

# AN INCREASINGLY UNAMERICAN YOUTH CULTURE

*Youth Euroculture is no longer an American import, and it's not what you expect.*

25 years ago, everything that European youth stood for came from America. The values, the cosmetics, the jeans, everything came across the Atlantic.

Nowadays, much of European youth culture is home grown.

For instance:

- One of the strongest influences on European youth at the moment is the rave scene. But the rave scene *did not originate in America*; it is *European* in origin. The prime sources of rave music are Italy, Belgium and Britain.
- In European cities in the sixties and seventies, the 'cool' youth clothes were brands of American jeans, like Levi's. Nowadays, Levi's are what your parents wear. The brands that youth aspire to: Chipie and Naf Naf - are *French* in origin.
- If you're seventeen, female, and want to stun the world, the prom queen look is no longer where it's at. Instead, you check out Kookai (from France), and become a *Kookaiette*.

In the nineties, if youth culture does cross the Atlantic, *it is as likely to be going the other way*:

- In New York's SoHo in 1989/90, the colour to wear was black. But this trend did not originate in America, it originated in Europe. The colour was always referred to as *London Black* in the New York style bibles because the trend had its origins in mid-eighties Britain.

- American youth is currently experimenting with wild colours and designs in clothes and household items that are *Spanish* in origin.

## **Drinking at sixteen is UnAmerican**

When marketeers claim that European youth follows American youth, they forget that young Americans don't enter a legalised drinking culture until they are 21, whereas in Europe, young men start regular drinking from the age of *sixteen*.

With drink becoming a more and more prominent part of the lives of young European women too, the differences between American 'rites of passage' and European ones are widening:

- Drink plays a prominent role in European teenage parties from 14 on. In the States, the legacy of Prohibition means young Americans can only gain unlimited access to drink when they *go to college*.
- Nowadays, many European teenagers report that their first sexual experiences were under the influence of drink. *Would this be true of the States?*

## **America will no longer be the future**

Twenty five years ago, everything from moon landings through to surf culture came from America. Europe, preoccupied with the cold war, and with a much lower standard of living looked on enviously.

In the nineties, all will change:

- Already Japan, not America, produces all the

***"Americans are so poor. The ones you meet are always going on about how much everything in Europe costs. You feel so sorry for them."***

MAN, 19, MÜNCHEN

***"How can young people in America have a good time at parties when there are so many armed psychos around?"***

GIRL, 17, LONDON

exciting consumer goods from ghetto blasters to sports cars that European youth covet.

- Japan will increasingly be seen as 'the future' - toilets that talk to you, high speed trains, interesting new foods that, unlike American foods, are *actually good for you*.

In addition, European youth are not as afflicted by the increasing xenophobia which Americans feel towards the Japanese, except in certain instances:

*"It is absolutely impossible to chat up a Japanese girl. They look at you, they smile at you and they walk off."*

MAN, 24, ROME

#### **The influence of Spain**

In 1992, where it's at for European youth is Barcelona, Seville and Madrid. Not only because of the Olympics and Expo 92, but because Spain is felt to be a *bubbling cauldron of energy* at the moment.

Levels of interest in things Iberian is so high at the moment, that Interail have slapped a 40 ecu surcharge on young Europeans who visit Spain this summer.

The Spanish influence on youth culture is increasingly being felt across Europe:

- Tapas bars are the trendy places to eat in many cities.
- Bars and nightclubs of all types are increasingly being decorated in 'Spanish' colours: ochres, bright greens, deep blues.

#### **New confidence**

This feeling that they are no longer 'style followers' has led to a new feeling of *confidence* amongst European youth.

There is a consciousness that, with the opening of the East, Europe is an interesting place to be, and with the single market about to happen, *no generation of young Europeans has ever had it so good*.

#### **A cultural explosion**

Will European adults be witness to this new explosion in youth culture across Europe in the nineties? We doubt it. In the nineties, youth culture will go *underground*.

***"In Spain, they never sleep. they finish work at 9 o'clock at night and go out and party until 2 or 3am. It's one big party."***

GIRL, 22, PARIS

***"I flew on a PanAm flight from Berlin to Frankfurt a while ago. God, their planes are so old. "***

MAN, 23, DÜSSELDORF

***"What's trendy to eat? Tapas, and above all, sushi."***

MAN, 25, LONDON

**WALKMAN  
COMPACT DISC  
VIDEO CAMERA**

These items are rated by European youth as 'the best inventions of the past decade.' *How many of them were invented in America?*

***"The only new thing to come out of America in the past few years has been Grunge Rock. What a joke."***

MAN, 19,  
DÜSSELDORF

# THE INVISIBLE MEDIA GOD

*Declining youth numbers, and a declining reliance on the media their parents watch means that in the nineties youth culture is going underground.*

## One medium

25 years ago, the mass media access was restricted to the affluent households of Northern Europe. Young Latins had limited exposure to the international sixties culture.

In 1992, the South has caught up.

Nowadays, 91% of EC 18 to 25s have a colour TV in their home, with the average home having 1.67 sets; even in poorer countries like Greece and Portugal, the figures are 70% and 80%.

In addition, one young person in two across Europe has a video at home.

*The current generation of EC teenagers are the first to grow up with the uniform cultural experience which homogenised American youth in the sixties and seventies.*

## Two forms of authority: PAL and Secam

Youth across Europe are much more likely to place trust in the *media* as a source of authority than the generation above.

Conversely, they are uniformly less in favour of authority across Europe than older Europeans, seeing the police, the armed forces and the church in a much less positive light than their parents.

*TV has replaced the Bible as their source of moral authority*

## Why haven't you noticed?

There are profound differences between the position of European youth in 90s society and the position of youth in the 60s.

In the sixties, the European population profile was much younger, and young people represented the

mainstream of society.

Declining birth-rates in European countries in the seventies however mean that youth represents a much smaller proportion of society in the nineties. *Youth culture is thus no longer mainstream.*

## Private media

By 1990, 19% of homes across Europe had cable TV, and 4% had satellite. Over the past two years these figures have grown dramatically.

*But they mean a lot more than just more channels for young people to watch.*

In the sixties, the television culture which unified and directed American youth (eg The Ed Sullivan Show) had an anodyne content, because it had to be acceptable for family viewing in the American living room.

In the nineties, more channels have allowed European TV companies to produce youth-only programming - programming designed to be watched by youth on their own TVs (and increasingly videos) privately in their bedrooms.

As a result, TV is now becoming part of youth *subculture*.

## It's the same with cinema

25 years ago, the cinema in Europe was an all adult medium. The growth in TV ownership has meant that older adults no longer go.

The cinema has become a *youth only medium*, the exclusive province of the under 25s.

Again, youth culture has gone underground.

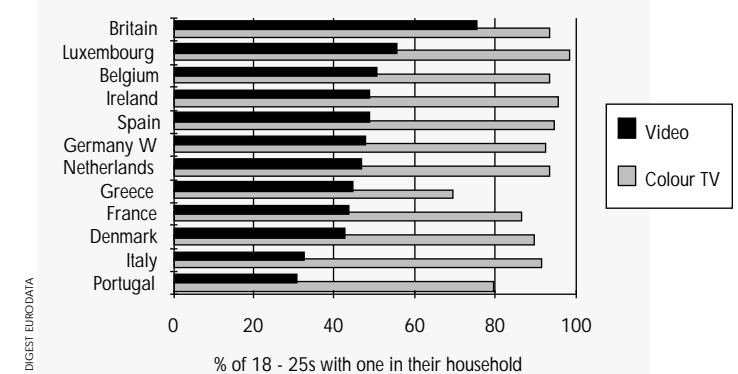
KRISTIANE BACKER

PIP DANN

RAY COKES

*Recognise these names? They are known to young people across Northern Europe as MTV 'VJ's. They are part of a pan European youth culture which is all but invisible to older generations.*

Who's got a colour telly and video?



*In the nineties, kids from Cadiz to Helsinki watch the same videos on the same televisions.*

## I WANT MY MTV

### MTV Europe adult audience

	INDEX
16 - 24	306
25 - 34	135
35+	33

Source: PETAR 1990

A decade ago, TV was a mass medium, and audiences had a flat age profile. As a result, older people saw what youth were up to. In the nineties, this is no longer the case.

### Marketing mistakes

Marketeers thus tend to make mistakes when they try to understand what youth is about.

They tend to think of youth as people who like Sting, Bruce Springsteen and Bob Geldof.

But they no longer appeal much to people under 25.

The youth icons of 1992 are people like Kriss Kross and Ice-T, who are all but invisible to older observers.

### Pan European media

Older Europeans have been brought up with media strictly limited to their own national environments.

With the next generation, this is no longer the case. Transnational cable and satellite channels have now penetrated such a large proportion of

northern European households that pan European youth TV is now an extremely powerful force.

### MTV

MTV is a combination of music videos, music news and interviews and lifestyle features.

What makes it completely different from conventional TV is:

- A much more fluid programme structure, designed for video literate youth, who prefer to dip in and dip out of the channel, rather than to watch formal programme segments.
- Content designed exclusively for the under 25s. No explanation of who Metallica are, assumed knowledge of Axl Rose's recent court case. None of the references to 'young people nowadays' that plague conventional 'yoof' TV.
- Content in Euro-English from presenters from all over Northern Europe. Euro-English is a simplified form of American English which is readily understood by youth from Berlin to Milan. Surprisingly to older viewers perhaps, this use of simplified English does not prevent the verbal content being powerful and interesting.

### Interactive TV

Science fiction? Wrong. It's already here. Cable companies around Europe are *already* offering interactive coverage of the Olympics. Instead of being told by the TV company what to watch, you can choose - athletics, swimming or results tables.

By the turn of the century, interactive TV will be so complex that it *won't just be the video where the kids have got the edge.*

### Tomorrow w

If the youth media situation *today* surprises you, in five years time, you will not recognise it at all. Youth will increasingly watch programmes older people *have never even heard of.* And the increasing use of a visual language understandable only by those aged under 30 means that youth TV will soon become *incomprehensible* to older adults.

### Disappearing from adult eyes

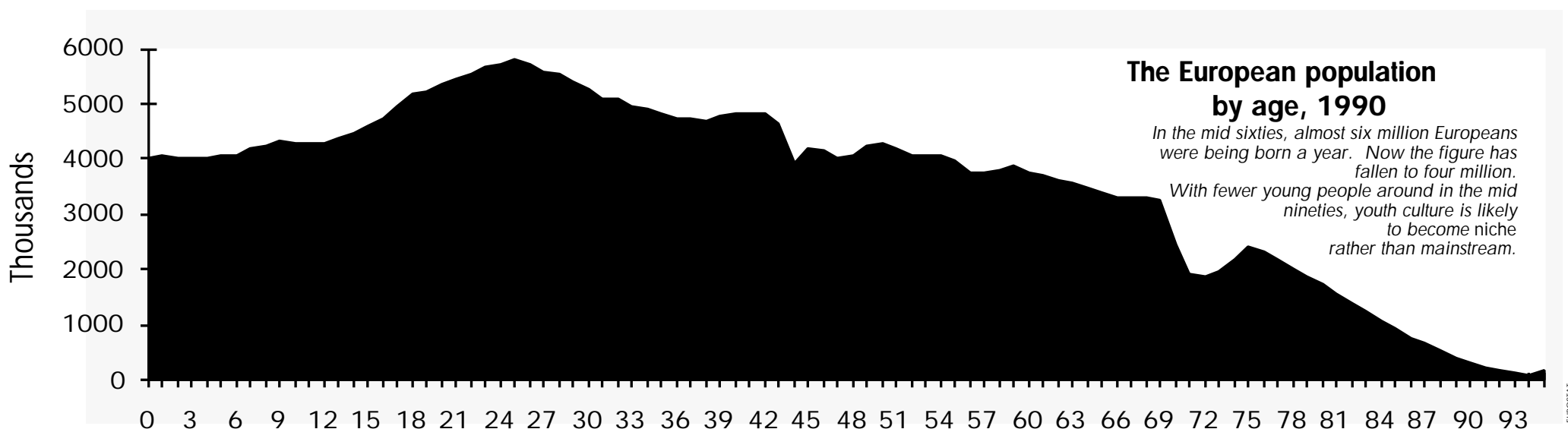
Soon youth *advertising* will disappear from adult eyes

Adults still see it at the moment, because segmented channels are still establishing their audiences. According to Nike:

*"With Eurosport and MTV the pure sports or youth oriented rock'n'roll stuff is obviously right for our image, but neither can do the job alone. The highest penetration they have is maybe 50% of households in one of the smaller markets."*

TIM O'KENNEDY,  
INTERNATIONAL MARKETING DIRECTOR, NIKE

He's right at the moment. But will he still be using mass channels in five years' time?



# WHAT'S IN AND WHAT'S OUT

*Most of what was in five years ago, isn't any more.*

## Back to 1971

The nineties is the 'new age' according to the youth style bibles, and as in the early seventies, mysticism is in, contrasting starkly with the materialist values of eighties youth.

In line with this, tarot readings and occultism have become areas of interest for young people. There is also a fascination with all things oriental.

## Kinky sex is in

Ever since Hollywood first started making romantic films, the cinema has had a powerful effect on the way men and women relate to each other.

Hollywood made it the done thing for couples to shut their eyes before they kissed. And the trend in sexy underwear in the thirties and forties was driven by a Hollywood banned from showing nudity by the censor, showing couples dressed in erotic lingerie as a second best.

## The naughty nineties

In the nineties, the many of the filmic influences on the sexual culture of European youth are completely different.

Whilst young Europeans still get many of their ideas about love from anodyne films like *Pretty Woman*, most of the time their material has a new slant on sexuality like:

- *Silence of the Lambs* - *glamorisation of a serial killer*
- *Blue Velvet* - *kinky sex*
- *Red Hot Dutch* - *the cable channel from the Netherlands that makes the cable smut you*

*get in hotel rooms look like Julie Andrews*

- Videos: *young European males habitually trade porno videos amongst themselves.*

This set of influences has strongly coloured young Europeans' attitudes towards relationships:

*"My boyfriend likes blindfolding me, undressing me and feeding me olives and dates."*

WOMAN, 22, LONDON

## Gay imagery is out

Youth nowadays have grown up in an atmosphere of AIDS hysteria, and the indications are that the campaigning has had some unintended effects:

- Young Europeans have a lot less affinity for homosexuals in the nineties. As one French girl put it to us:

*"If you suspect a boy is bisexual, you don't go near him. You assume he's positive."*

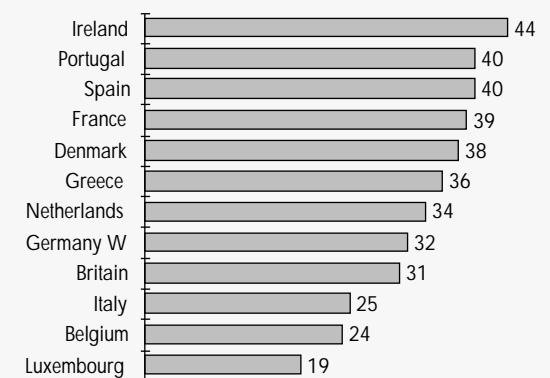
GIRL, 19, NÎMES

- It's the same with anyone who shoots drugs. In the seventies, drug addicts were seen as the vanguard of youth society. In the nineties, they are seen as 'diseased'.
- The kids of the nineties across Europe have parents who are reasonably liberated. Sex does not have the shock value it used to have

***"Our material civilisation will not survive, but we are not going backwards, we are going forwards.. this planet is ready to bring forth intelligent, spiritualised, dematerialised consciousness."***

TERENCE MCKENNA,  
PSYCHEDELIC PROPHET

## Smoking is in in Iberia



% of 18 - 24s saying they smoke regularly

*Smoking is in decline amongst young people throughout Northern Europe. However, tolerance is the watchword. They are less likely than their parents to object to smokers in a group. In Spain and Portugal, meanwhile, smoking is in. Men smoke to be macho, women smoke as a sign of liberation from the male dominated Iberian societies under the dictators.*

## IN

Crystals  
Tarot  
Shamanic Arts  
Sharon Stone  
House music  
Going to Thailand  
Anything Japanese  
Prague

to previous generations of youth. The way to shock your parents is to admit to having *unsafe sex*:

*"I told my mum that I did it with Thierry without a condom because it felt better, and she just freaked out."*

GIRL, 22, PARIS

**AIDS is a joke**

Young people in the nineties are not convinced that AIDS is the threat it is cracked up to be. Most young people dismiss AIDS as 'just hype'.

The consensus is that:

- It isn't a disease that 'normal' people get.
- You don't need to worry as long as you're careful.

Clearly, there are grounds for great concern amongst the healthcare community.

**Drugs, except E, are boring**

The American drug culture has now penetrated so far into Europe that a wide variety of recreational

drugs are available to youth in all urban and suburban centres.

However, most drugs are seen by European youth as merely 'part of the scene' nowadays. They have lost their social protest value, as many of today's young Europeans' *parents* smoked soft drugs in the sixties and seventies.

*"We have forgotten 1968 and all the hash. It's our parents who haven't."*

MAN, 25, VERSAILLES

In the nineties, drugs such as Ecstasy (MDMA) have made an impact. This is one of the few drugs which 'belong' to young people nowadays.

**Evian is in**

With high energy dancing the craze of the early nineties, young people across Europe get dehydrated. As a result, the humble mineral water bottle is rapidly acquiring cult status. With time, it may become a youth icon.

**Sexism is out**

As young European women increasingly seek a career rather than babies, traditional sex stereotypes are on the decline amongst European youth.

This lack of sexism is reflecting itself more and more in terms of social life. Whereas twenty years ago, a rigid, male dominated Spanish society made bars and alcohol a taboo for women, in the nineties, young Spanish women party and drink almost as much as Northern European women.

Similarly, the disregard for women in the business sphere which pervades Spanish men over 30:

*"You see how he just ignored me? Women in this country just don't exist."*

GERMAN BUSINESSWOMAN,  
SPAIN

...is not a part of the culture of younger Spaniards.

**So what?**

A study of youth culture is interesting in itself. But it is *vital* if you wish to target a group that is the future of the EC Single Market.

A group which is ripe for exploitation...

***"I got a dish and a decoder for Red Hot Dutch. Electric Blue has nothing on this."***

MAN, 18, LEEDS

***"A fin de siècle air of liberation has granted Europe's youngsters the legal right to behave in ways their parents could only dream of."***

ROMAN ROLLNICK  
THE EUROPEAN

## OUT

Money  
Greed  
The American dream  
Safe Sex  
Settling down  
Yuppies  
Nirvana

# RIPE FOR EXPLOITATION

*Not only are Eurokids a single target market, they are much more likely to respond to the appeals of marketers expanding out of one EC country into others.*

## **I'm too sexy for my country**

Young people across Europe have much less loyalty to their own national brands than older adults.

According to research conducted by INRA/MINTEL, 18 - 24 year olds in Italy, Spain, France UK, Germany (W) Belgium and the Netherlands are all significantly less likely than older adults to favour buying household durables made in their own country.

They are also more likely not to mind what country their clothes come from, 'as long as they are the right design, quality and price.'

In a 1991 study commissioned by Alto amongst men across Europe, car buyers were asked how likely they were to buy a Japanese car next time round.

*In all countries surveyed, younger car buyers were more likely to choose Japanese.*

## **Foreign is groovy**

In our qualitative research across Europe, we have consistently noticed that young people have a much greater affinity with foreign influences than their parents.

This is clearly reflected in research into eating habits. In each of seven European countries surveyed for MTV, 18 - 24s had a much greater interest in eating foreign foods than their parents.

*So if you're launching a pan-European restaurant chain, you know who to target.*

## **Le fric, c'est chic**

It would be easy for marketers in many areas to

dismiss European youth as a niche market and to ignore them.

Youth are important in colas, is the argument, but not in televisions.

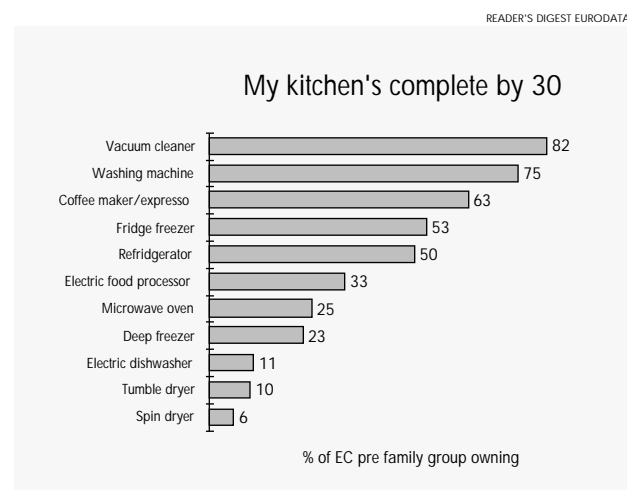
But with rising affluence amongst youth in the nineties, they are now the drivers in many markets which would normally be seen as middle aged in profile.

For instance, young Europeans have usually bought most of their household appliances in their twenties, long before they proceed to have a family.

Amongst young pre family Europeans who live away from their parents, 53% have a fridge freezer, and 25% a microwave oven.

Affluence at an earlier age means that these items are no longer the prerogative of couples in their thirties.

*Eurotrash are the core consumer in more markets than you think.*



## INTERNOSHNAI

*"I'm interested" in international cuisine*  
18 - 24 age group INDEX vs all adults

Italy	200
Belgium	167
Germany W	162
UK	157
Netherlands	155
Spain	131
France	130

Base: 7000 European adults  
Source: INRA/MINTEL 1988/MTV

*If you're launching a range of microwaveable Tapas, or home sushi kits across Europe, think young.*

*Rising youth affluence means that 'middle aged' goods are being bought by younger and younger consumers.*

# KIDS IN THE EAST

*Whilst youth in the West are homogenous, lack of valuta makes a distinct difference for youth in the East.*

## 40 years of hell

Consider the case of a young woman from Dresden interviewed in depth by Alto in 1987, two years before the Wall came down:

- Not only had she never heard of the soft drink Seven-Up, she had never seen a standard Western soft drink can before, and when given one, *did not know what to do with it.*
- Living in Saxony, the 'valley of the lost', where West German television signals could not penetrate, she had *never heard of Madonna.*
- Despite widespread travel in Eastern Europe (Lake Balaton, Sochi), she had *never enjoyed a hamburger.*

This young woman was by no means untypical of young people in Eastern Europe.

Five years ago, before the Iron Curtain came down, and before the homogenising influence of Western TV swept the East, the differences between East and West were huge. *Culturally, Eastern youth could have been on another planet.*

## Commie coercion

The *pressures* on youth in the East were also significantly different to those on youth in the West at this time:

- Lower incomes meant that youth had to aim for what they wanted in mid life (a colour TV, a car) *from eighteen onwards*, to stand any chance of getting it.
- State control of entertainment meant that access to decent nightlife usually required *Party*

*connections.*

- Aspirations were dictated by those who did well out of communism. In the eighties, young women in Dresden all wanted to date Libyan students - because such students had *more disposable income per week than most local men earned in a year.*
- Young Russian girls all went for KGB officers, because only they had access to the *sophisticated nightclubs* aimed at Westerners.
- The declining population of the DDR also put huge state pressures on young women:

*"The state give you huge incentives to get married, a flat and a large amount of money. But the money isn't a gift, it's a loan. And you have to pay most of it back if you don't get pregnant within a year or so."*

WOMAN, 25,  
OFFICE ADMINISTRATOR  
DRESDEN, 1987

## Change in the former DDR is fast

However, whilst Eastern German youth are still far behind the West, they are rapidly catching up, as part of the second German economic miracle.

The indications are that they will catch up with Western living standards a long way before their parents will, simply because they are more *flexible*:

***"Pessimists say that getting the East up to western standards will take 50 years. It probably won't take ten."***

BARBARA BECK,  
ECONOMIST

***"The impossible will be done at once. Miracles take a little longer."***

GERMAN PUB SIGN

Whilst older Eastern Germans remain at home, the railway stations and offices of the West ring with the distinctive Saxon accents of young Eastern clerks.

### Rest of the East

For other young East Europeans, the economic situation is not as promising. With no EC membership and little Western economic aid, many young East Europeans are disappointed by the lack of progress since the wall came down:

- The Western freedoms most had wanted were the freedoms to drive a car, to have a colour TV and to travel. *But such freedoms require money.*
- Economic instability has led to disillusionment with capitalism. The only visible signs of capitalism to Eastern youth are *closing factories.*

It is this resentment, more than anything else, which is driving the growing ugly nationalism in eastern countries.

### Concerns

Whilst Eastern European youth are held back from

adopting western lifestyles, they are rapidly adopting western *values*. The core concern of western youth, environmentalism, is of particular concern to young people in the East because of the limited environmental controls applied to eastern industry, and the preponderance of heavy industry in Poland and eastern Germany.

In addition, young Poles still resent the legacy of Chernobyl:

*"We don't enjoy our food as much back home. It glows in the dark."*

POLISH WAITRESS,  
LONDON

Clearly, youth in the East are slowly moving towards western youth values. Whether we will be able to classify them as Eurotrash soon, or not depends on one thing: *money*

## KIDS IN THE WEST WANT TO HELP

% of EC citizens in favour of taxes to help Eastern Europe	
18 - 24	56
<b>25 - 34</b>	<b>51</b>
<b>35 - 49</b>	<b>47</b>
<b>50 - 64</b>	<b>46</b>
<b>65 +</b>	<b>36</b>

Source: Readers Digest Eurodata 1990

There is a solidarity between Eastern and Western youth that isn't present amongst their parents.

***"We advertised for waitresses in the Leipziger Post, and got 100 replies for every job we had. It seems that every father in the DDR wants to send his daughter to work in the West."***

WESTERN GERMAN HOTEL OWNER,  
1991

## MAIN RESEARCH SOURCES

### 1 Alto youth qualitative research project

14 focus groups conducted by Bianca Taapken and Simon Silvester of Alto amongst young men and women aged 18 - 24, in Amsterdam, Barcelona, Brussels, Düsseldorf, Milan, Paris and London.

### 2 Reader's Digest Eurodata

A Consumer Survey of 17 European Countries, sponsored by The Reader's Digest Association Inc. The EC sample base was 16860 adults aged 18+, representative of the 239.6 million adults in the EC. The survey was conducted by Reader's Digest in Summer 1990. Many questions are comparable with a similar survey conducted by Reader's Digest in 1969.

### 3 Eurostat

Statistical office of the European Community, based in the Berlaymont Building, Rue de la Loi 200, Brussels. In particular, Demographic Statistics, 1991.

### 4 Eurobarometer

Eurobarometer public opinion surveys have been conducted on behalf of the EC Directorate-General for Audiovisual, Information, Communication, Culture of the Commission of the European Communities each Spring and Autumn since 1973. Standard sample size is 1000 per country.

### 5 Centro di Investigaciones Sociológicas, Madrid

Publications such as Permanencia Y Cambio en la Familia Española, 1990, and La Opinión Pública Española ante Europa y los Europeos.

### 6 Euroscopie

Published by Larousse, Paris and based on the pan European studies of the market research company Sécodip, Paris. Author: Gérard Mermet.

### 7 Alto European Car Buyers Survey

An investigation into the effect of national provenance upon car

buying motivations amongst men in Germany, France, Italy and Britain. Fieldwork by Sample/Mölln, Audience Selection/London, SPI-Téléperformance/Paris and Computel-Laser Research/Milan

### 8 Alto pan European automotive qualitative study

A four country qualitative research project managed and conducted by Market Behaviour Limited, London

### 9 MTV Youth Survey

Fieldwork by INRA/MINTEL in 1991

### 10 Der Mittelstand als Gestaltende Kraft in den neuen Bundesländern

... and other publications of DM/Verlagsgruppe, Düsseldorf.

### 11 Marketing and Research Today

Published by ESOMAR: the European Society for Marketing and Advertising Research, J.J. Viottastraat 29, 1071 JP Amsterdam.

# WHAT IT ALL MEANS FOR MARKETING

## Do you have a Euroconsumer?

If your product appeals mainly to *older people* - pensions, vitamin supplements and so on, the differences between your consumers in the various European countries will remain so great for the foreseeable future that it makes little sense to try to think of them as a single target market.

If your product appeals mainly to *families* - most foods, toilet cleaners - you will find that attitudes vary by country, but they are slowly subsiding over time.

You will need to market sensitively by country.

If however, your product appeals to *youth* in Europe, you should consider pan European marketing thinking.

Young people are increasingly a single target market across Europe - you can treat them as such.

## Sophisticated advertising consumers

The traditional approach to European youth has been to dress young people up in wacky clothes, and do wild typography in print advertising, and rock soundtracks on TV.

There are strong indications that this approach no longer works. Youth, more than any other part of European society is now advertising literate. Creativity is what counts, not patronising imagery.

## America isn't enough

Over the past twenty years, the standard method of doing European youth campaigns was to link the product to America. This has been done by every product Coca Cola to brands which have no

real American heritage, like Stimerol chewing gum.

Whilst America remains a powerful image for Europeans, the indications from qualitative research are that America is no longer enough, and that advertising imagery borrowed heavily from the American dream is now seen as a stereotype, not belonging to brands any more.

## Ethics

Today's youth have grown up in the affluent Western Europe of the seventies and eighties.

20 years ago, youth dreamed of attractive clothes and a decent nightlife. Nowadays, to most young people in European cities, such things are freely available.

So whereas youth in the past hankered after cars, records and so on, in the nineties the youth battleground has risen a stage.

Youth around Europe youth have gone ethical.

They are concerned more about rainforests than clothes.

As their concerns have become more spiritual, so they have become less susceptible to the traditional 'designer' trappings of eighties marketing. You can't attract them with a superficial label any more.

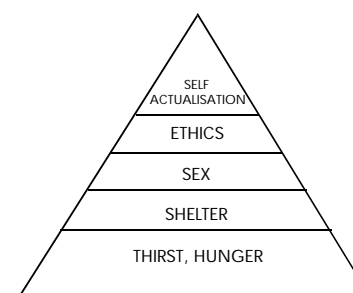
## The medium is the message

When Marshall McLuhan said this in the sixties, he was twenty years ahead of his time.

When it comes to nineties youth, even a good

**"You can fool too many of the people too much of the time."**

JAMES THURBER,  
THE NEW YORKER,  
1939



*Maslov's hierarchy of needs. Young West Europeans are at the 'ethics' level; young Easterners are lower down.*

advertisement placed in the wrong medium, mainstream media rather than MTV, Wheel of Fortune rather than a music show can fail to attract.

Youth know they are a niche market nowadays, and they *expect* to be targeted.

Selecting the right media environment has thus become a crucial part of a successful youth advertising campaign.

### Style permission

The reaction of European youth to an ad depends as much on *who it is perceived to be talking to* as on what it is actually saying.

If they sense that the advertisement is 'middle aged', 'out of touch' or just 'not on the right wavelength', the marketing message stands little chance of being taken in.

*Most advertising produced by European banks aimed at recruiting young account holders falls into this category.*

For an advertisement to work against Eurotrash, it must contain 'style permission'.

Before you open your mouth, you must ensure that they are listening.

*"An advertisement has to be only fractionally off the cutting edge for its entire communication to fail."*

PATRICIA MANN,  
JWT, LONDON

### Ethics

One campaign which provokes outrage and discussion amongst youth across the continent is that of Benetton. The campaign uses powerful political metaphor and a social conscience rather than mundane product points. Whether Benetton have got the approach right or not is open to debate.

But what is clear is that the successful youth campaigns of the nineties will follow their lead, by realising that a marginal product-based selling point has little power compared with the *lure of ethical beliefs*.

### Summary

Much as we may despise their junk culture and preference for frozen pizza over fresh pasta, MC Hammer over the Rolling Stones, these people are

the future of Europe.

As they grow older and become the mainstream of European society, their single tastes will unify the markets they buy in.

Eurobrats thus represent the most important generation in European marketing history.

This report has merely scratched the surface of their beliefs fears and aspirations. Marketeers who wish to follow them into the history books need to look at them much, much closer.

## EUROKIDS MARKETING CHECKLIST

Score one point for each name on this list you recognise.

Get 18 out of 20 and it's congratulations\*. Less than five? Keep your day job.

Daddy Mac	o
Marijne van der Flugt	o
Diamond and Pearl	o
Helena Cristiansen	o
Super Mario Bros	o
Zuppa di Capra	o
Sophie B. Hawkins	o
Tonton David	o
James Pond	o
Suprême NTM	o
Sonya Soul	o
L7	o
Dana Carvey	o
Mathilda May	o
Claudia Schiffer	o
Falco	o
Sonic the Hedgehog	o
Sir Mixalot	o
Callum Colvin	o
Naomi Campbell	o

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# SO WHAT IS ALTO?

Alto is a group of advertising agencies, with offices in Barcelona, Brussels, Düsseldorf, Hamburg, London, Milan and Paris.

Each agency is independent, none is run by distant bosses thousands of miles away. Alto doesn't like long chains of command.

## **Creative**

Each Alto agency has a formidable creative reputation in its home market.

Alto thus has the talent to create powerful ideas and imagery that can sell products and services across the continent.

Without such ideas and imagery, an internationally coordinated approach will still work.

As a structure, that is. It is unlikely to have much effect on consumers.

## **No dogma**

Alto does not apply any specific dogma to any particular advertising problem.

Our organisation has been built on the belief that there are no short cuts when it comes to European advertising.

## **A neural network**

To make an advertising approach work, each Alto member first makes it their business to acquire a deep understanding of its local market, consumers, distribution and media.

We then fit the organisation to the advertising problem, not the problem to the organisation.

Alto's structure thus flexes in line with the new Europe - a complex tapestry of nations, with no simple borders.

## **Relais and Châteaux**

From a client's perspective, it's a bit like staying in *Relais and Châteaux*, where the service is good and the sense of local culture strong, rather than

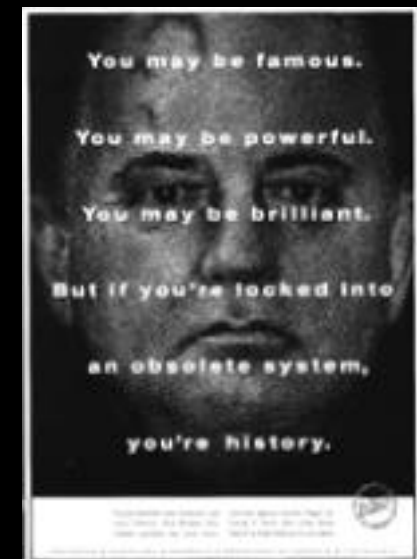
in an international hotel chain, where, but for a couple of dishes on the room menu, the guest may as well have stayed in New York.

## **What's in it for you**

Alto offers the best possible treatment for Pan European advertisers.

It offers this treatment regardless of size of budget. Pan European advertisers will find in Alto seamless co-ordination, a common view and identically high standards of quality along with a powerful understanding of individual markets.

They will also find themselves helped by the *total involvement of the founders of our six agencies.*



***“It is much easier to act under conditions of tyranny than to think.”***

HANNAH ARENDT