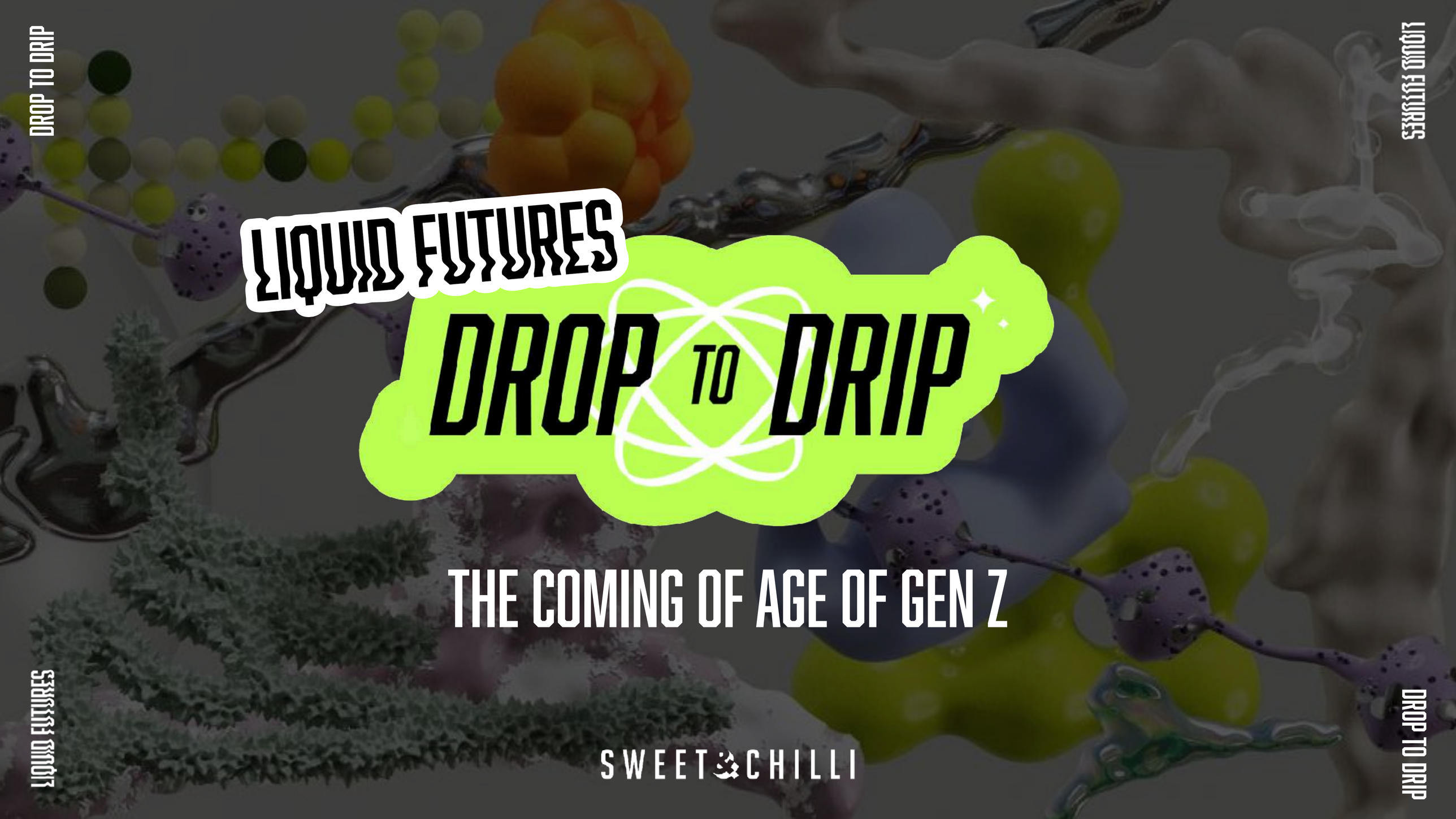
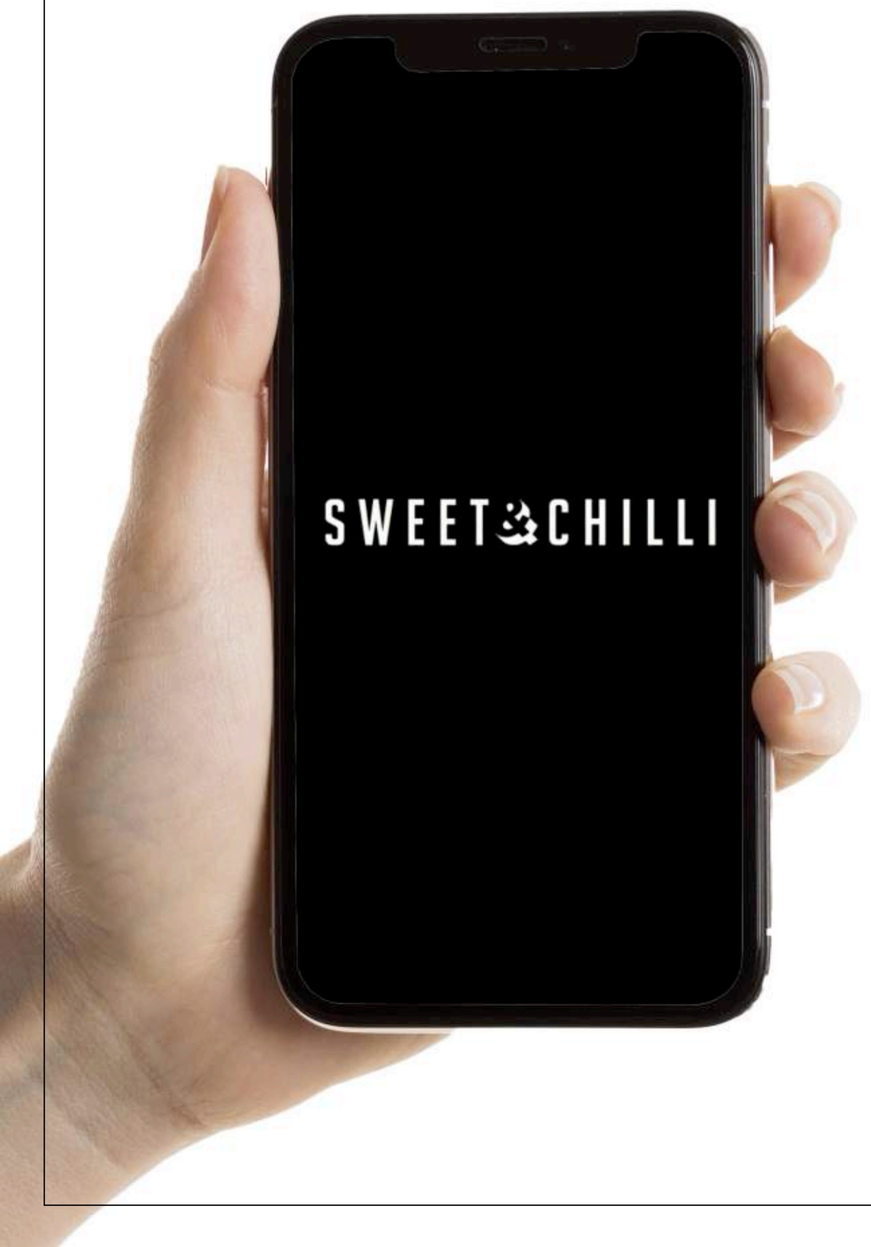

LIQUID FUTURES
DROP TO DRIP
THE COMING OF AGE OF GEN Z
SWEET CHILLI

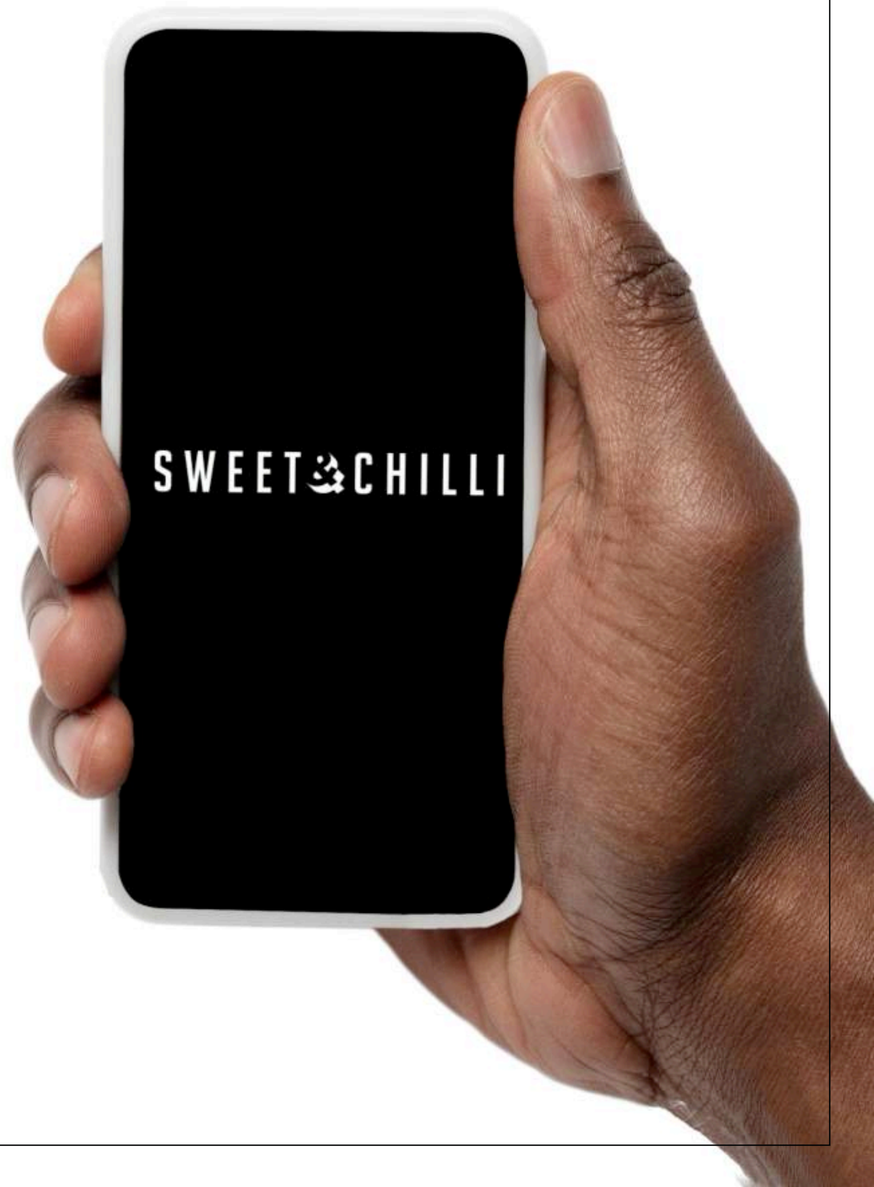
From drop culture, rooted in anticipation, exclusivity & being in the know...



...to understanding what makes a drinks brand or experience coveted by Gen Z



WHO WE SPOKE TO



1 GLOBAL GEN Z

A macro view of the shifting demographic landscape

2 DAY IN THE LIFE

Getting up close & personal with Gen Z, their habits, values & the brands they love

3 FUTURE GAZING

Reinventing brands & experiences for the Gen Z audience

1 ZOOMING OUT

GLOBAL GEN Z

A macro view of the shifting demographic landscape

By 2030, Gen Z will be the most influential & powerful market drivers for your brands, highly influencing consumer mindsets outside of their demographic & beyond.

GEN ALPHA ←









> Their media consumption habits are shaping digital marketing trends. Growing up where the boundaries between online and offline are blurred making them a powerful generation with significant purchasing power and influence."
>
> **The Guardian**

OUR FOCUS

18+ GEN Z



YOUNGER GEN Z

40%

40% of spending on luxury goods came from people making $50k or less.

Bank of America 2023 study

76%

76% of Gen Z describe themselves as activists.

Vice 2030 Study

9.5H

Time Gen Z spends online, more than half of waking hours

Axios Survey 2023

2020 / 2021 - FORMATIVE PANDEMIC YEARS

GEN Z IS THE MOST CONTRADICTORY GENERATION



Geopolitical uncertainty

On-going stress

Loneliness epidemic

40% of Gen Zs say they feel stressed all or most of the time.

(Deloitte)

73% of Gen Z individuals admit to feeling alone either sometimes or always.

(Psychology Today)

Formative pandemic years



Housing crisis

Gen Z spends half its waking hours on screen.

(LA Times)

Screentime overload

Economic uncertainty

56% of Gen Zs live pay check to pay check.

(Deloitte)

Climate anxiety

Inclusive

Empathetic

Optimistic

56% of Gen Z say they would not accept a job without diverse leadership.

(World Economic Forum)

76% of Gen Z agree they have a great future ahead of them.

(Gallup)

Mental health openness



Globally connected

Activist mindset

Adaptable

61% of Gen Z believe they have the power to drive change within their organisations.

(Deloitte)

74% of Gen Z would opt for either hybrid or totally remote work.

(BBC)

Digital natives

Drinks brands & hospitality are perfectly positioned to engage & reward Gen Z.

Mindful consumption → **REVOLUTIONISING LOW & NO**

Doomscrolling → **REAL LIFE PLEASURE**

Loneliness epidemic → **REINVENTING THE SOCIAL OCCASION**

Climate anxiety → **REDESIGNING CONSUMPTION**

Desire for social status → **SHARING KNOWLEDGE & EXPERIENCES**

This report is principally through the lens of brands & insights from a western perspective.

However, with big demographic global changes we anticipate a shift in the trend epicentres with Africa, South America, SE Asia and Middle East becoming increasingly key culturally and commercially.



LATIN AMERICA'S GEN Z: GLOBALLY IMPACTING

46M
Instagram followers
#badbunnypr

Latin culture and artists are now impacting many aspects of our global influences and brands.

Rising superstars like Bad Bunny are fast attracting international brands including Gucci, Adidas, Crocs (and Kendall Jenner) as they appeal to more diverse audiences worldwide.



AFRICA'S GEN Z:
EXPORTING CREATIVITY

Cameroon is the 4th biggest market for Guinness but in recent years Africa has demanded that the brand reflects their culture & creativity and rather than imports from the West.

In response, Guinness Bright House was launched with a digital hub & IRL events, celebrating & spotlighting African culture and creativity in music, fashion & art.



60%

60% of the 1.3 billion people living in Africa fall below the age of 25.

Mo Ibrahim Foundation

27.6M

Audience reached through digital platform

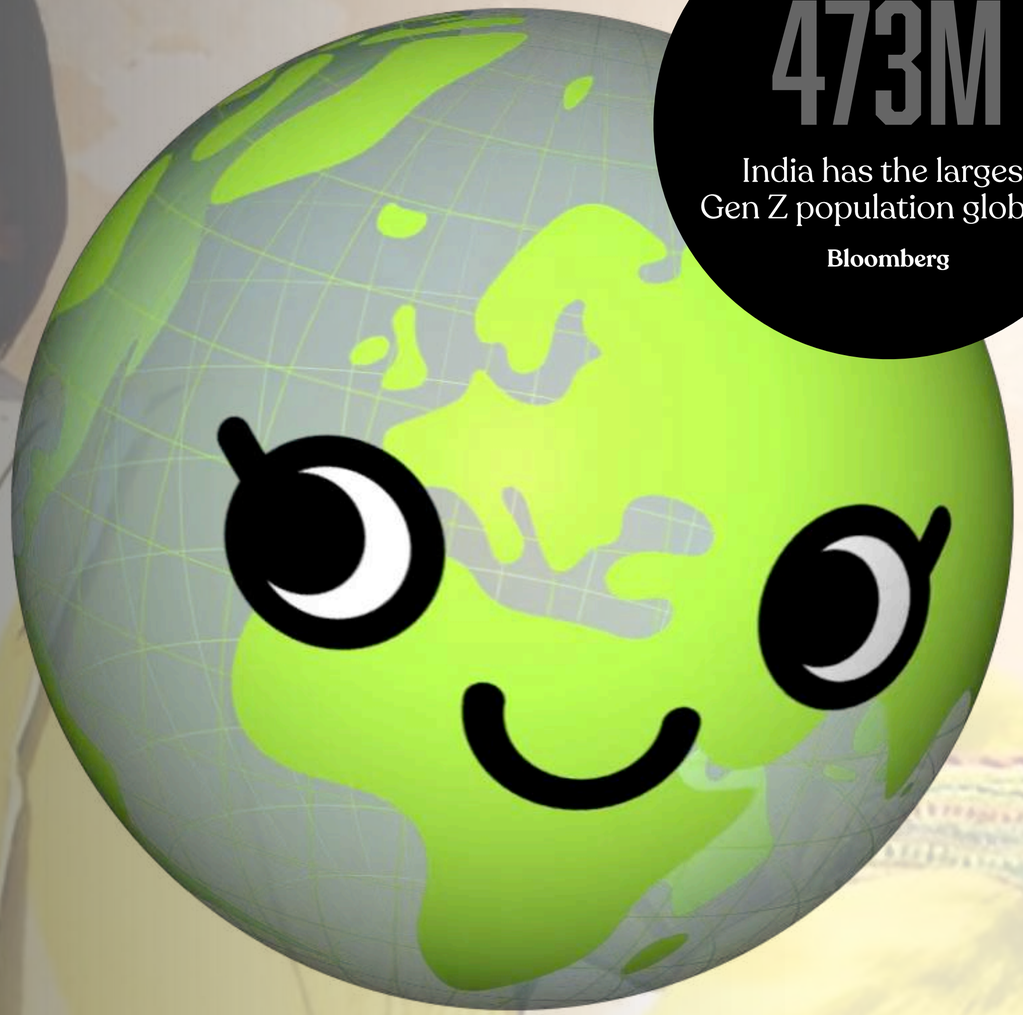
Guinness Bright House

INDIA'S GEN Z:
SURGING LUXURY

India's luxury market is rapidly evolving, driven by Gen Z's "if I want it, I'll get it" mindset.

With a growing middle class & rising disposable incomes it is estimated that by 2025 their Gen Z and Millennials will total 70% of the global luxury market audience.*



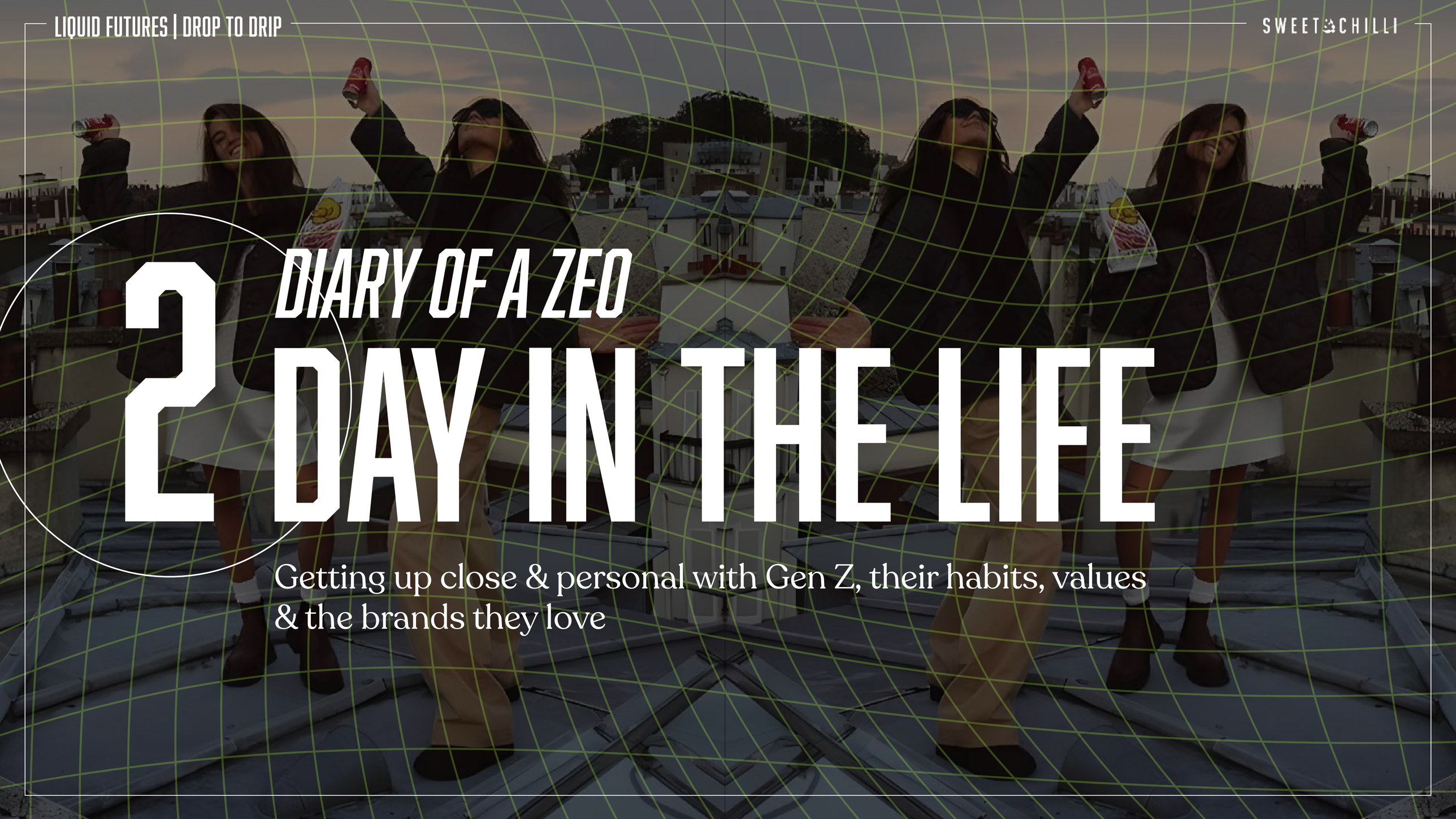


473M

India has the largest Gen Z population globally

Bloomberg

*Bain & Company



2

DIARY OF A ZEO

DAY IN THE LIFE

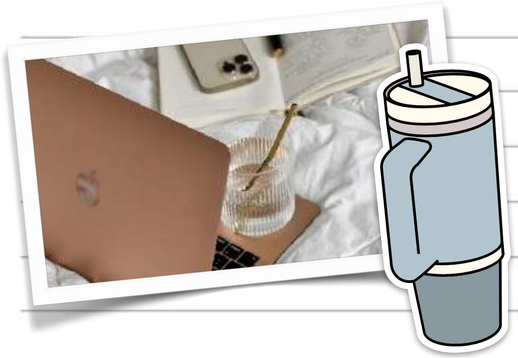
Getting up close & personal with Gen Z, their habits, values & the brands they love

A DAY IN THE LIFE...

DAY
XX
MONTH

Morning Routine





Work Life



Dating & Socialising

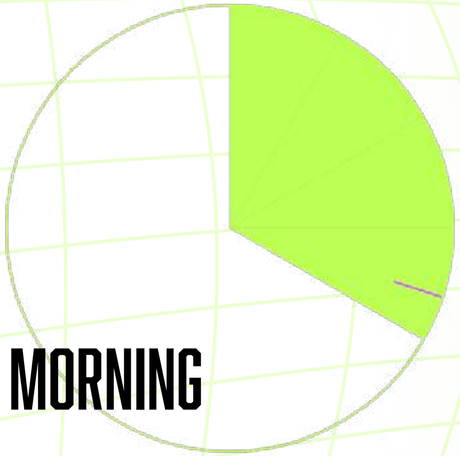
DAY
XX
MONTH



Going Out

Bedtime Routine





MORNING

CONSCIOUS RISERS

#5to9 started trending on TikTok in 2022 with health influencers. Even if not all Gen Zs are early risers, their pre-work hours are focused on mental & physical health. Taking time for themselves before giving it to their employers is of utmost importance.

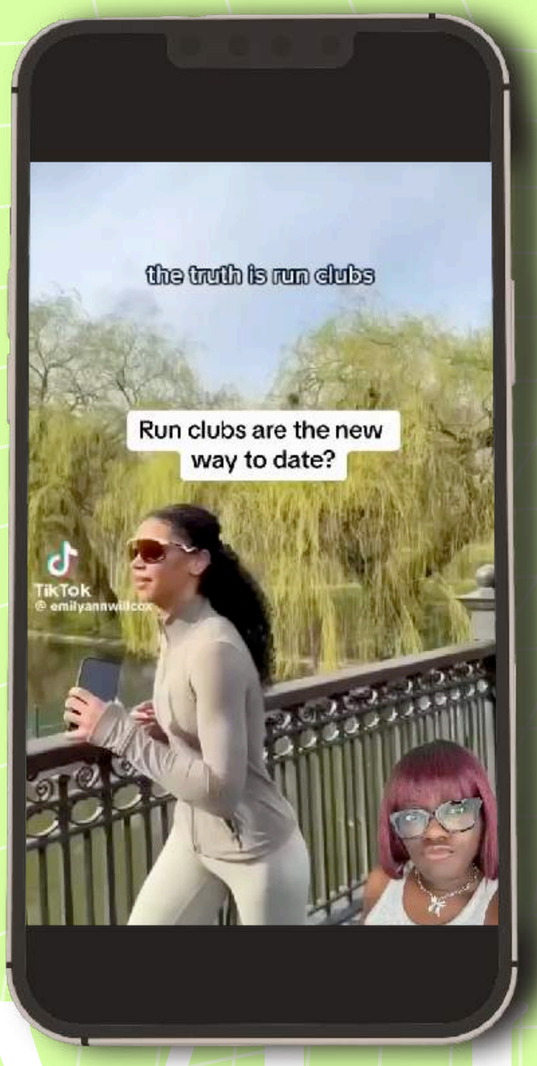
The pandemic has shown them they can study, socialise, & work from their bedrooms - from **#bedrotting** as mental health to podcasting from bed.

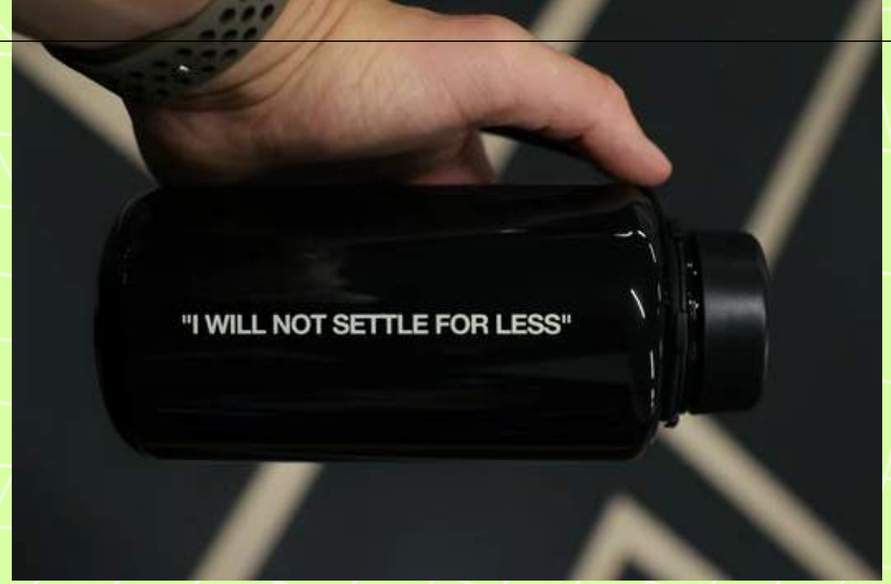












SELF ACTUALISING GENERATION

Project 50 is a lifestyle enhancement platform where users follow 7 rules every day, for 50 days. Created by SOM Studios, they market apparel & accessories targeted at Gen Z who want to maximise their potential.

ULTRA-PERSONALISED STYLE

Was Crocs' revival just a stroke of lockdown luck? **Crocs** advocacy of comfort — as well as personalisation through its Jibbitz charms, found a serendipitous match with the post-pandemic fashion zeitgeist. High-profile collaborations have been key in driving Crocs' global fashion status - from Balenciaga to KFC.



200%

Crocs increase in sale since 2019.

New York Times

WHAT'S HOT



WORK DAY

CREATIVE ENTREPRENEURS

With rising costs of higher education, the traditional pathways have lost their appeal.

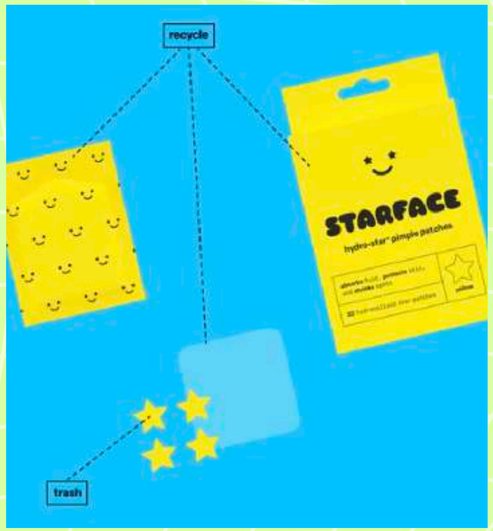
Against the backdrop of the gig economy & an impending AI revolution, new expectations are rising - **#quietquitting**, flexiwork & side hustles.

Entrepreneurship & creativity are core Gen Z values, with 44% believing that ambition is most important in building a career.









GEN Z NATIVE STARTUPS

Gen Z brands find new solutions to old problems. Using a combination of AI, social, & commerce apps Gen Zs are launching viral products at super-speed.

Starface has catapulted to cult status with their bold aesthetic & messaging that destigmatises acne.

90%

Believe that new jobs will be created by AI by 2030

Vice 2030 Report



#CORPCORE

90s and 00s nostalgia has translated to Gen Z work culture as demonstrated by the semi-ironic popularity of corporate fashion, beauty & interior style.



WHAT'S HOT

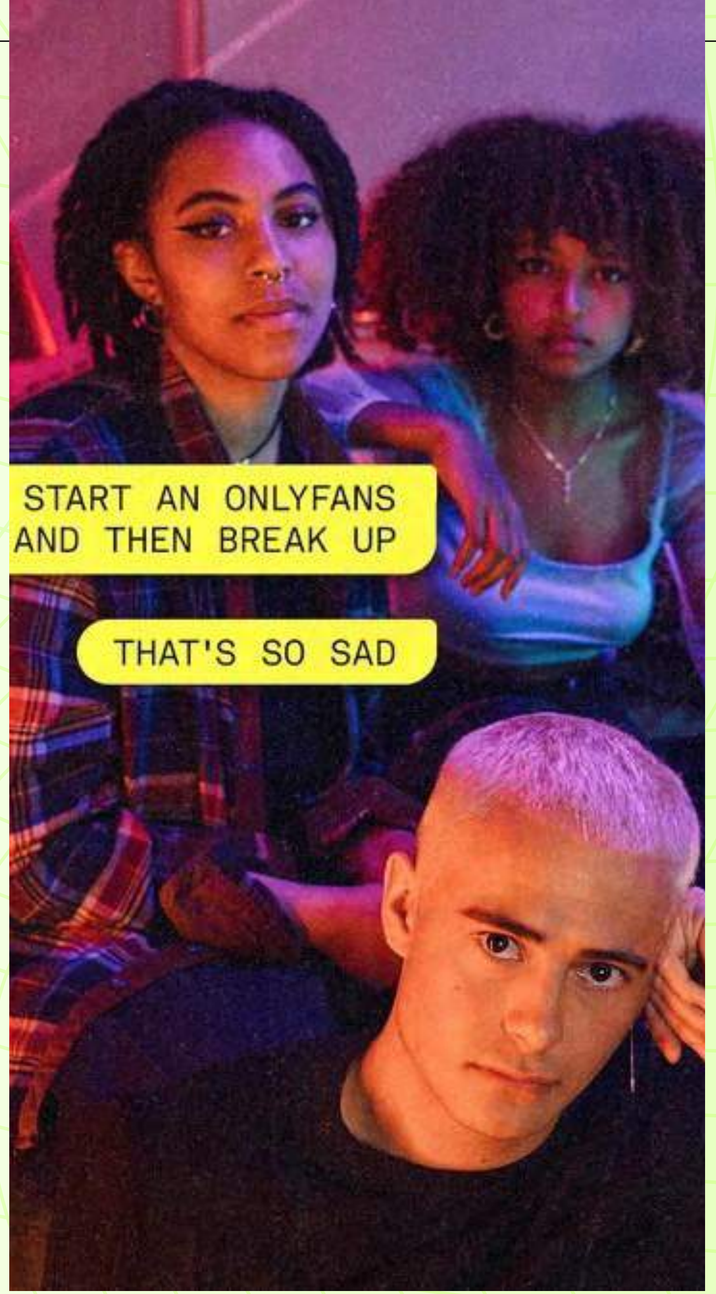


FRIENDS & DATING

SOCIAL EXPERIMENTERS

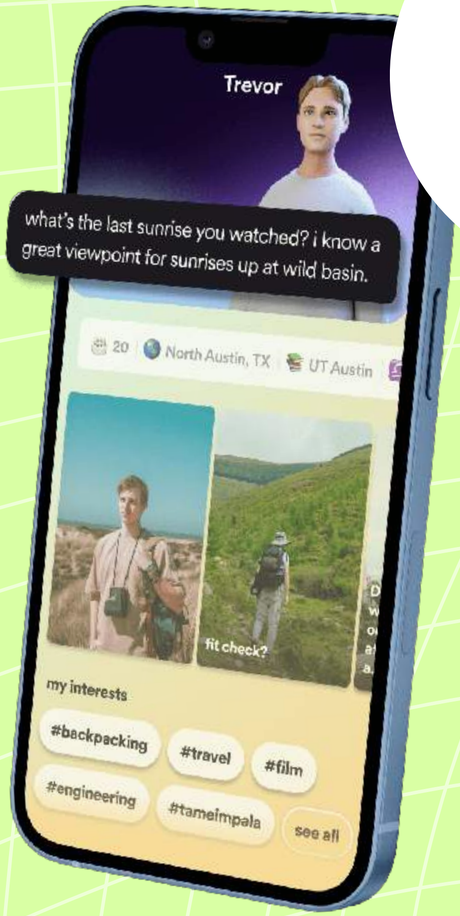
Gen Z social habits were impacted by Covid, but now a key factor is the rising cost of going out, prices increasing above inflation rates, soaring service charges & tipping culture.

Gen Zs are going out less but when they do, it's a bigger occasion & overall more special.





WHAT'S HOT



79%

Of Gen Z prefer IRL dating

Bloomberg

AVATAR DATING

In a world of ghosting and unsolicited pics, Gen Zs are striving for algorithm-enhanced IRL dating.

Dating app **Snack** allows users to create an avatar to represent them, interact with potential matches (or their avatars), leading to the perfect match without the endless texting!



IRL FLEX

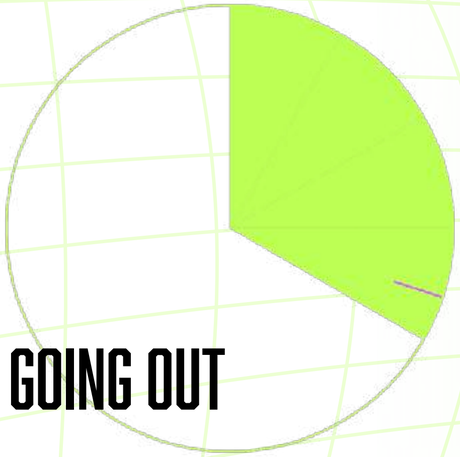
Despite being globally connected via socials, Gen Z has admitted to having fewer close friends.

Beavertown partnered with **CALM** to break those barriers with a pint & a packet of crisps! Printed inside each packet is a series of conversation starters to help you open up to your mates.

TREAT YOURSELF

Gen Z is combating diet culture and indulging in sweet treats with friends as a social and sharing experience.





GOING OUT

QUIET IS THE NEW LOUD

#pubsnotclubs #grandadcore we are seeing a steady increase in the popularity of heritage brands like Carhartt, Guinness & Grant's whisky. Traditional "old man" pubs are cool again due to their perceived "authenticity".

Collabs are key to keeping heritage brands fresh - LOEWE x Guinness sweaters.







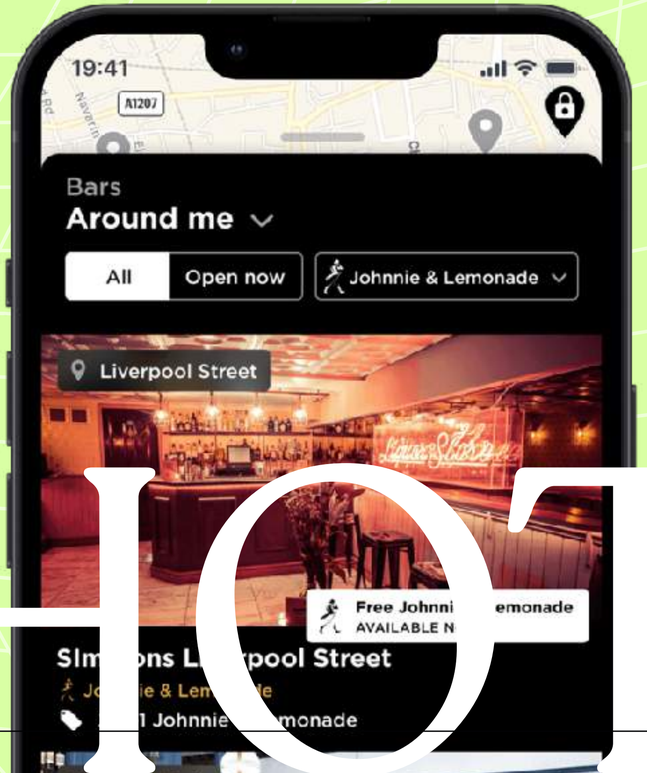


STORMZY'S HOUSE PARTY

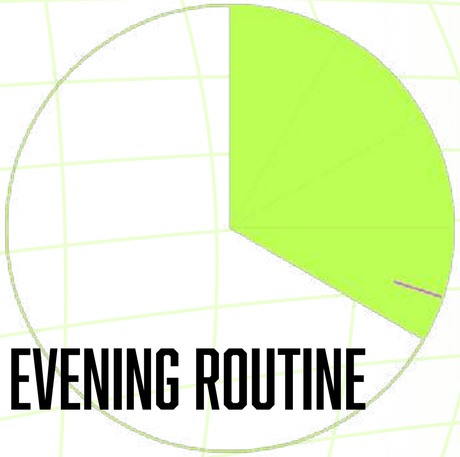
Stormzy's House Party bar in Soho recreates nostalgic house parties with seven unique floors. Featuring beer pong, retro video games & top DJs, it appeals to Gen Z's love for immersive, Instagrammable experiences.

WHATEVER IS CHEAPEST?

The **DUSK** app uses a point-based system to offer consumers rewards & free drinks when they explore new bars. 70% of the app's 1 million users are Gen Z.



WHAT'S HOT



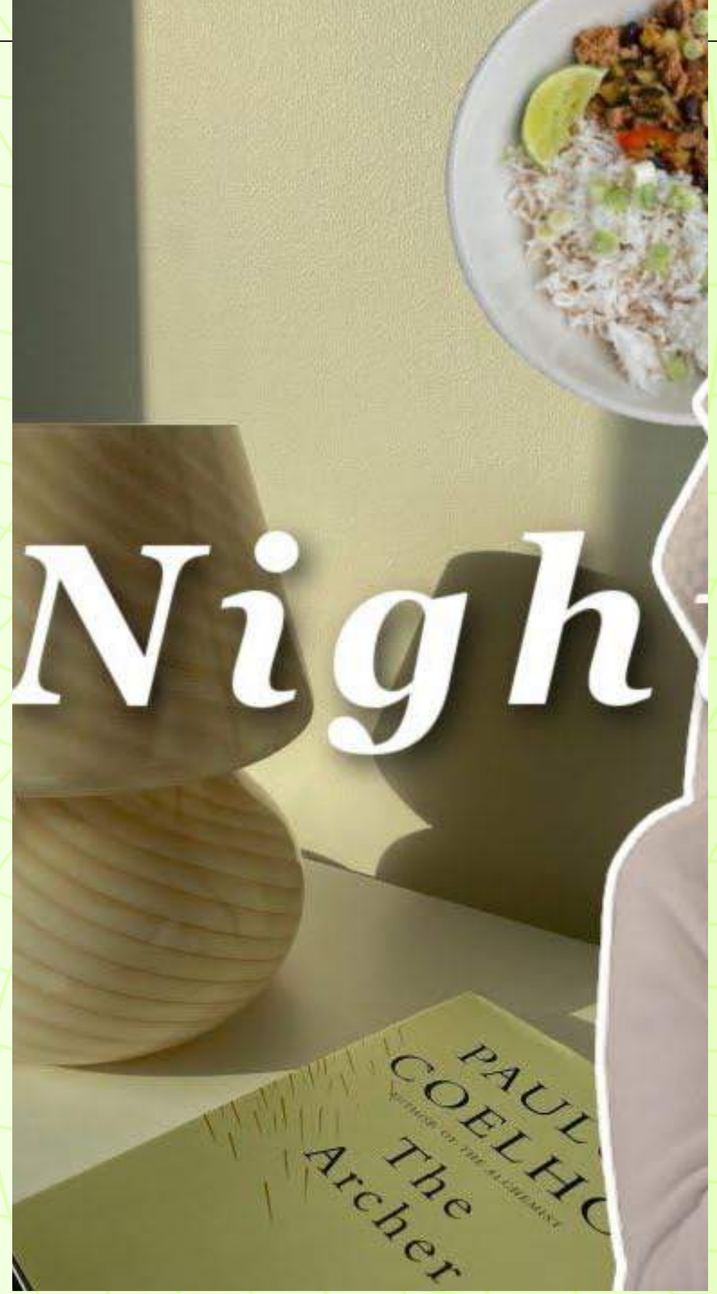
EVENING ROUTINE

WELLNESS ADVOCATS

It's time to wind down and go **#goblinmode.**

A key Gen Z value is being **#cosy** - cocooning in the face of an increasingly chaotic world. Early nights brings the dual benefit of healthier lifestyle & saving money, with social needs being met online.

Gen Zs are elevating bed time routines into binge-able entertainment - with viewers yearning for the aspirational "quiet life".







#GIRLDINNER

The "girlhood" movement is having a moment & Gen Zs are leading it. The movement is defined by humorous, joyful & uncompromising hyper-femininity.

Is there anything really new or gender specific about girl dinner? No. But it speaks of relinquishing expectations rooted in diet culture or gender roles.



61%

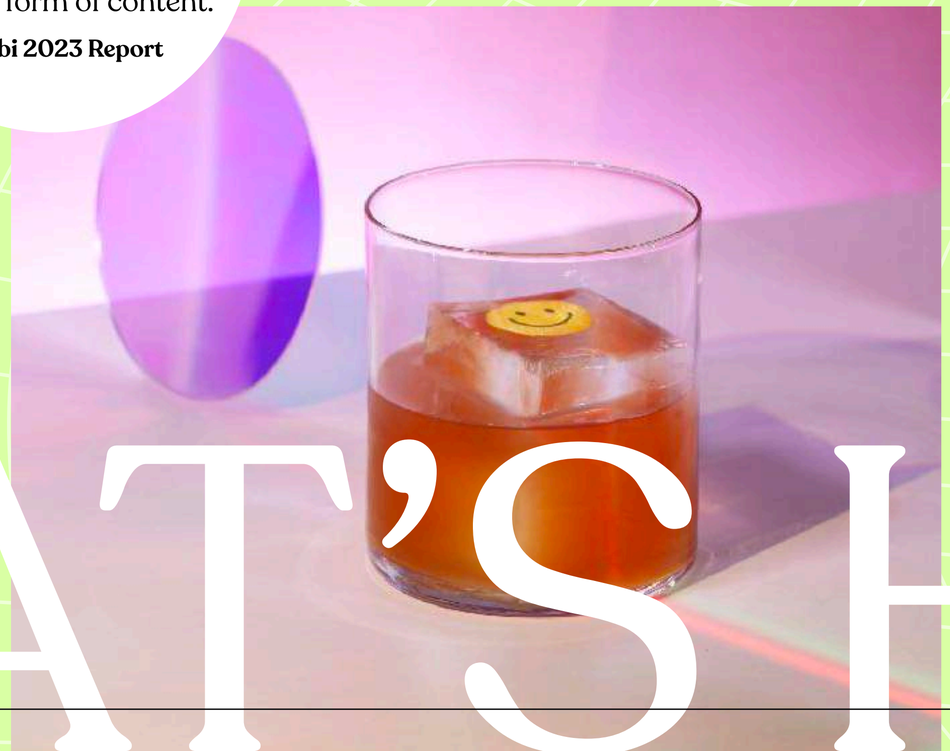
Say that UGC is their most watched form of content.

InMobi 2023 Report

BEDROOM POP

The pandemic gave Gen Z the push to soar creatively from the comfort of their bedrooms, giving rise to Bedroom Pop. There is a mindset shift away from music consumption & towards community.

Musicians use patronage platforms, such as **Patreon** to gain financial support from fans.



HEALTH MIXOLOGY

Gen Z is drinking less than any generation, with a rise in "sober-curious" individuals. This has opened up the doors to mood-enhancing non-alc drinks, using CBD, mushroom or other adaptogenic ingredients, as heroed by S&C own brand, **NOOBIES**.

WHAT'S HOT

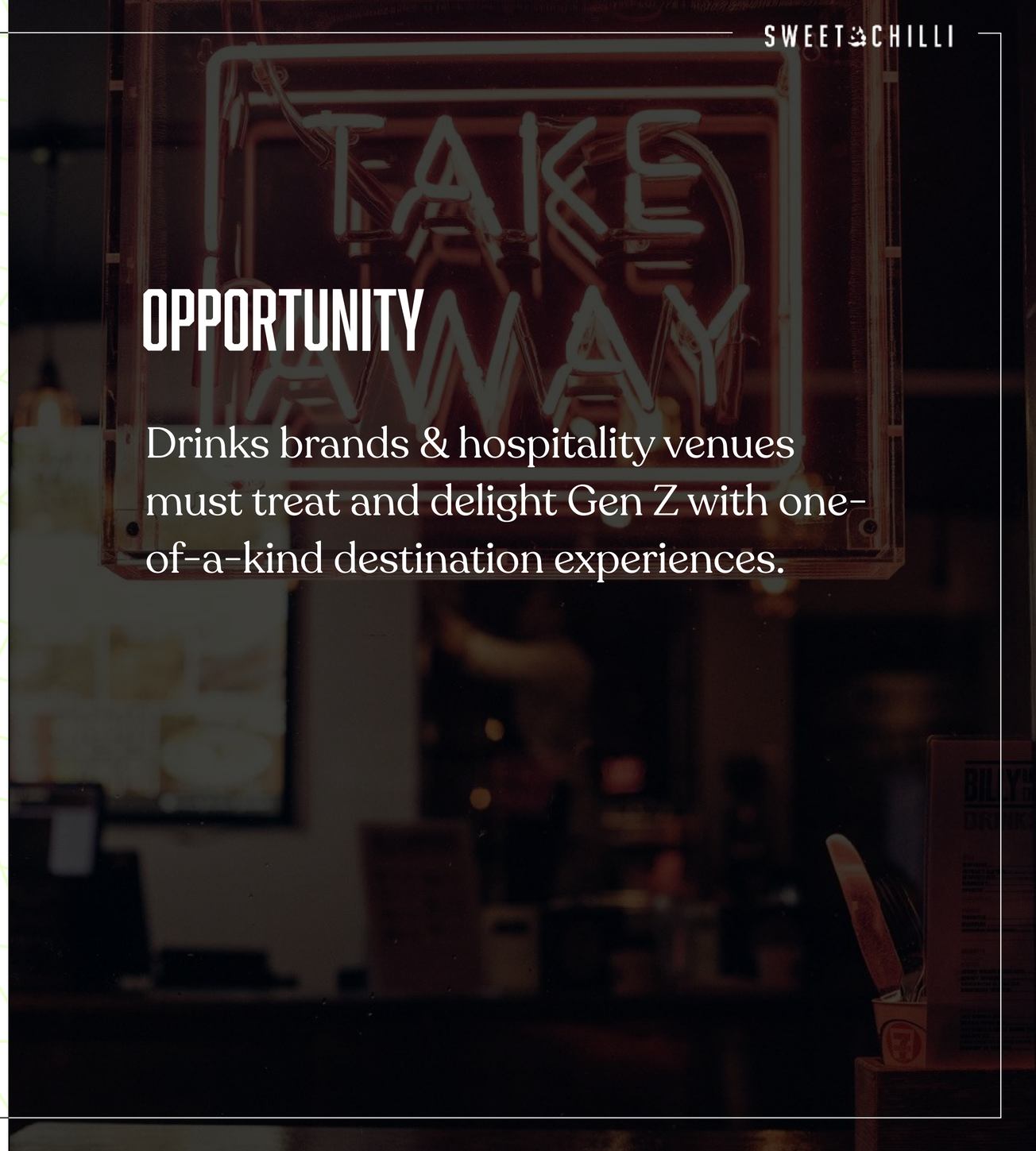


3 ASKING WHAT IF? FUTURE GAZING

Reinventing brands & experiences for the Gen Z audience

KEY TAKEAWAYS: MONEY

- Gen Z's influence is disproportionate to their purchasing power.
- Housing market inequality means they are disincentivised to save, so they like to treat themselves.
- They go out less, so when they do it's a bigger occasion.
- They enjoy the power of being in the know & spending more on higher quality or even luxury brands.

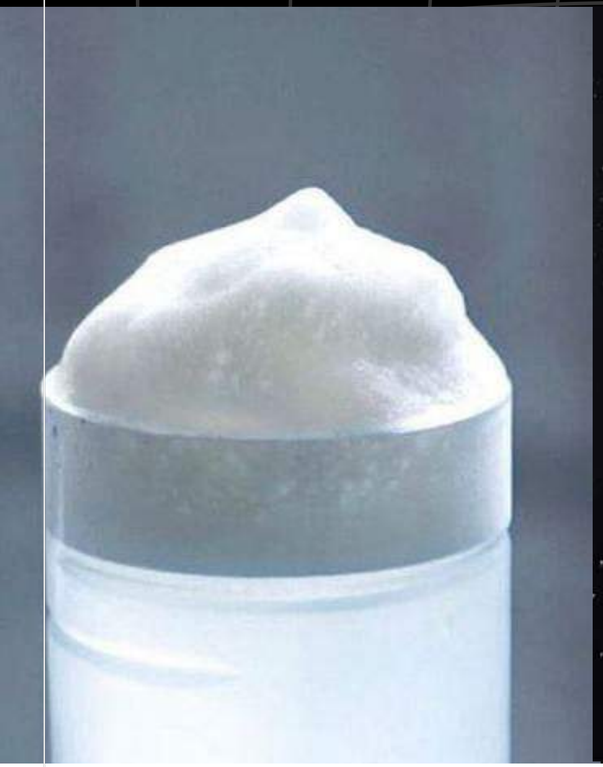


OPPORTUNITY

Drinks brands & hospitality venues must treat and delight Gen Z with one-of-a-kind destination experiences.

WHAT IF...?

Float: a catch-your-own drink experience



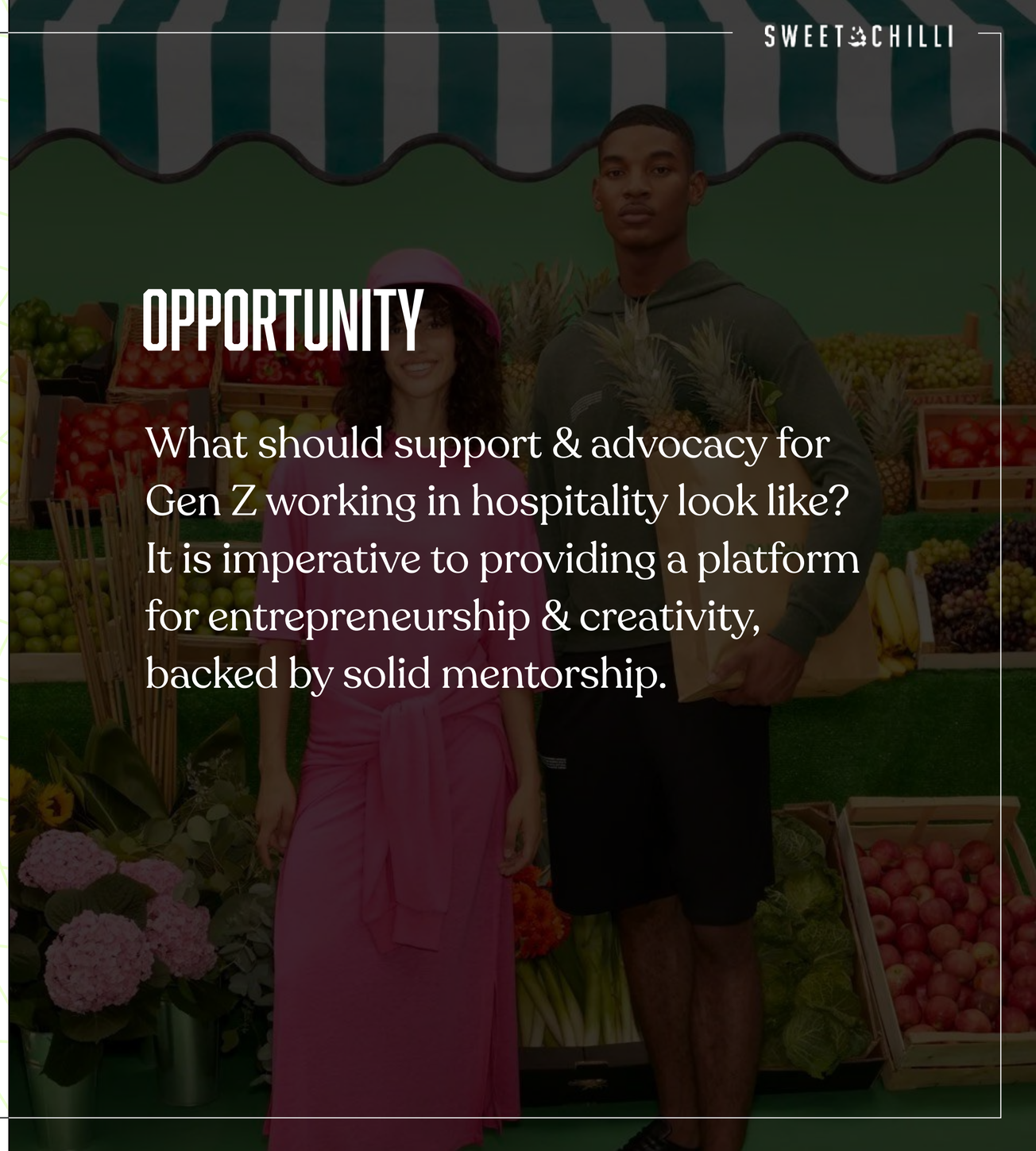




REINVENTING THE DRINK EXPERIENCE | BUTTERFLY NETS ARE THE NEW GLASSWARE | HELIUM EDIBLE COCKTAIL FOAMS | NEW MOUTHFEEL EXPERIENCE

KEY TAKEAWAYS: WELLNESS

- Gen Zs are striving for self actualisation & self improvement.
- They discuss mental health openly & it is a non-negotiable in the workplace.
- They reject diet culture & they love to treat themselves.
- Health & wellness is seen as a status symbol.



OPPORTUNITY

What should support & advocacy for Gen Z working in hospitality look like? It is imperative to providing a platform for entrepreneurship & creativity, backed by solid mentorship.

WHAT IF...?

Third-space Hospitality Incubators







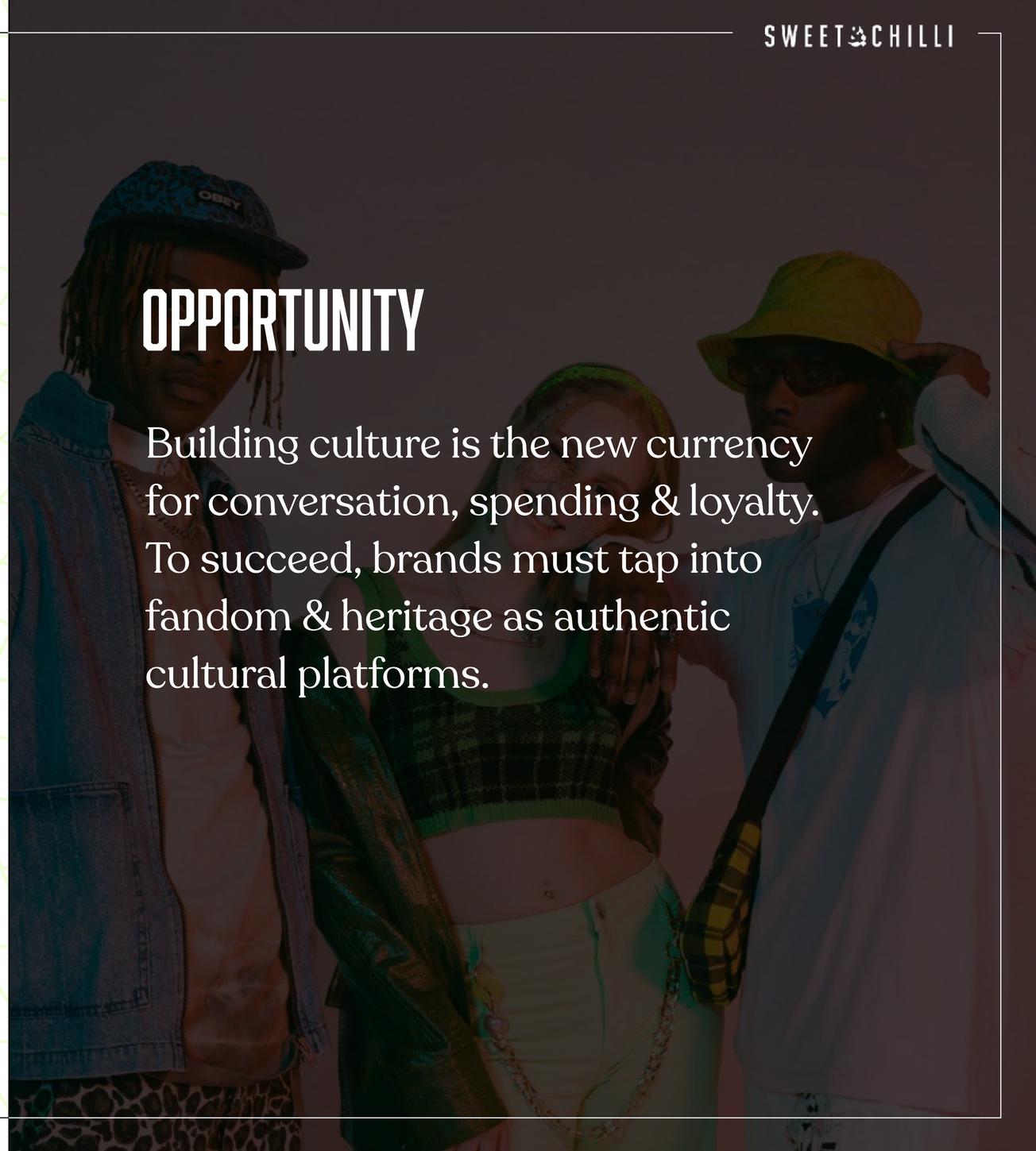
CO-WORKING SPACE FOR BARTENDERS | BAR & BRAND DEVELOPMENT | TESTING KITCHEN & STREAMING STUDIO | PUBLIC BAR TAKEOVER FLOOR

KEY TAKEAWAYS: IDENTITY

- They have a strong sense of personal branding & the products they choose or the venues they visit are part of that brand.
- They believe in labels as a way to find self expression.
- They are willing to pay more for brands that they align with in mission, values, and aesthetic.
- Sustainability is a given.

OPPORTUNITY

Building culture is the new currency for conversation, spending & loyalty. To succeed, brands must tap into fandom & heritage as authentic cultural platforms.



WHAT IF...?

Adaptogenic Sleep Spa







KICKSTART BEDTIMEROUTINE IN-VENUE | ASMR DJs | COLLAGEN COCKATILS | VIT D LIGHTING | SUPERCOOL BOOTH SEATING | RED LIGHT THERAPY



> The best way to predict the future is to invent it

GEN Z READINESS CONSULTATION CALL

Chat to our drink experts and creative strategists

Discuss your Gen Z needs

Set up the simple next steps that will increase your Gen Z appeal

GEN Z REACH WORKSHOPS

Unlock a specific barrier or problem that stops you reaching Gen Z audiences

We'll guide you to the Aha! moment

End with a clear Now-Next-Future plan

GEN Z BRAND REFRESH

Become an aesthetically coveted brand

Brand or campaign identity refreshes to reach a younger demographic

Stand out - be it on a shelf, or on social

GEN Z-TARGETED CAMPAIGNS & BRAND EXPERIENCES

End-to-end creative and execution

Helping you become part of Gen Z culture

Increased sharability & desirability

Measurable halo effect

DROP TO DRIP

LIQUID FUTURES

LIQUID FUTURES

THANK YOU

DROP TO DRIP

LIQUID FUTURES

DROP TO DRIP