

# Identity

Consumer  
LIFESTYLE TRENDS



I want to express the views and values of myself and my community, and have that uniqueness and creativity respected and celebrated...



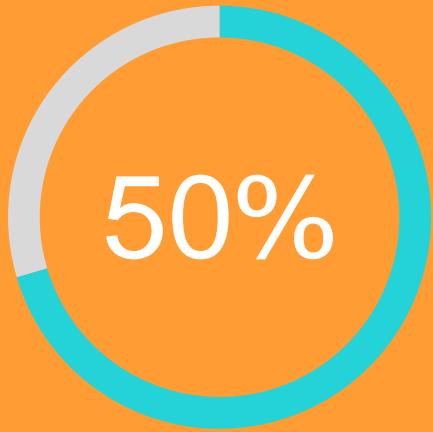
Fragmentation of groups  
Identity spectrums  
Growth of niches  
Creative networks  
markets of one  
Hyper-personalisation  
fluid gender  
**Polyculturalism**  
empowered groups  
culture  
protection  
Local, national and regional pride



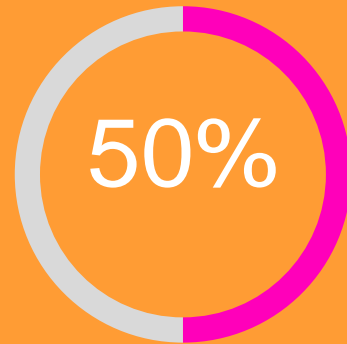
61%  
of consumers agree that nowadays we are free to shape our identities and transform ourselves in whatever way we want – vs 52% in 2014.

Global Monitor, 2017

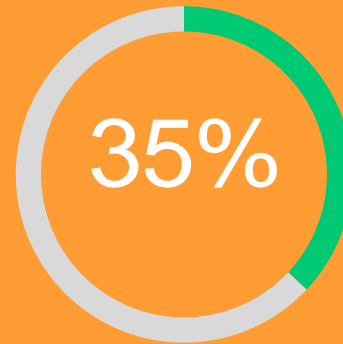
How likely do you think you are to be at risk from discrimination on the grounds of gender, religion, ethnicity, sexual orientation etc?



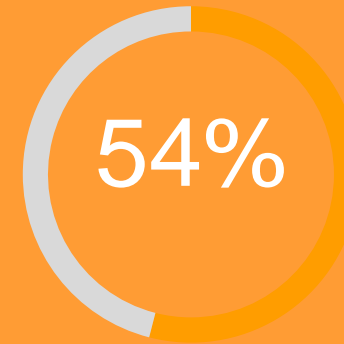
**Global**  
-4% since 2016



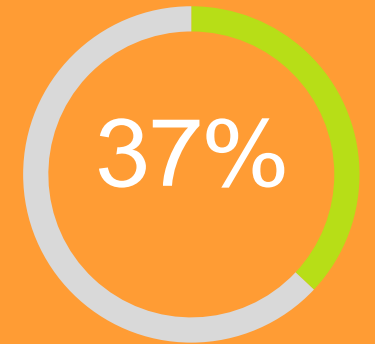
US (-6%)



UK (-11%)

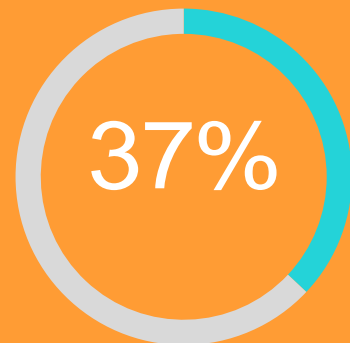


Mexico (-3%)

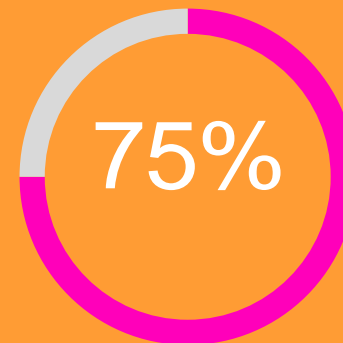


Germany (-8%)

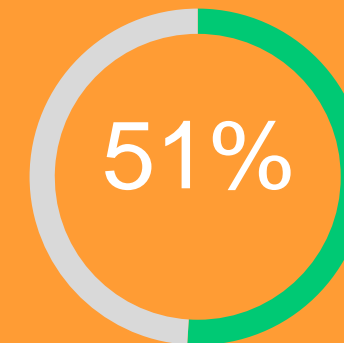
*With demographic change and increased migration, perceived risk of discrimination decreases dramatically...*



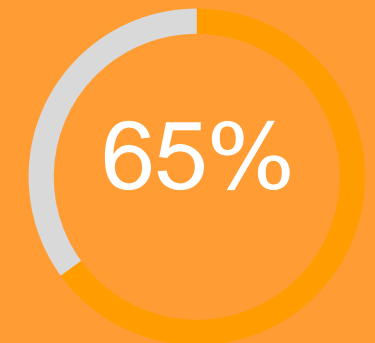
China (~)



Malaysia (~)

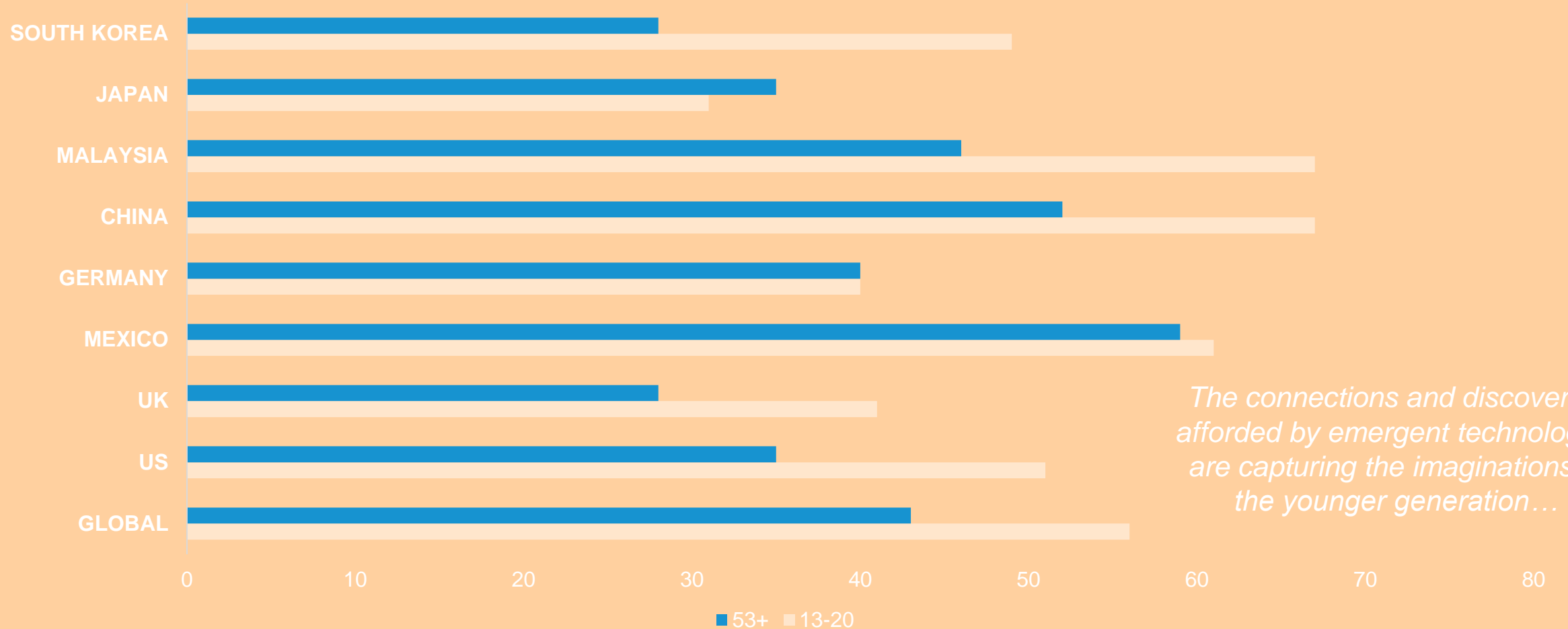


Japan (-6%)



South Korea (~)

“I am always looking for different cultural experiences and influences that will broaden my horizons“



*The connections and discoveries afforded by emergent technologies are capturing the imaginations of the younger generation...*



## WHAT'S DRIVING THE TREND?



### Multipolar worlds

Slow growth and heightened volatility in developed countries, and booming industries with rising middle classes in developing countries, has shifted the balance of global power.

During 2018, southern and eastern economies are projected to show GDP growth of 4.8% whilst western economies will grow by just 2.1%. Governments are introducing policies to cement this success. China's government have invested \$990bn on their 'One Belt, One Road' strategy, which seeks to re-centre regional trade along the Silk Road.



### Increasing economic empowerment of women

In the next two decades, an estimated 1 billion women will enter the global workforce. This shift will predominantly be seen in emerging and developing nations, and will significantly alter women's economic and political influence.

Entrepreneurial opportunities are being seized by women, breaking down the historic 'glass ceiling'. In China, 55% of new internet businesses are founded by women.



### Rise of Protectionism

There has been a surge of support for political and economic insularity, with rising advocacy for protectionist measures.

The world's top 60 economies have adopted more than 7,000 protectionist trade measures since the financial crisis of 2008.

Nationalist movements have become more dominant, tapping into economic uncertainty, rising terror threats, and a loss of trust in conventional governing bodies to rally support. In the West, populism is at its highest levels since the 1930s.

## WHAT'S DRIVING THE TREND?: DRIVERS



### Multipolar world

Emerging and Developing markets' GDPs are predicted to grow by 7.4% CAGR form 2018-2025, compared to 3.89% CAGR for developing countries.



### Economic empowerment of women

In China, 55% of new internet businesses are founded by women.



### Rise of Protectionism

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## COMMUNITY & Identity

## HOW IS IT MANIFESTING?: SUB-TRENDS

### Identity spectrums

'Deaveraging' becomes an essential approach for meeting the diverse needs of consumers who identify with a broad variety of gender identities

### Cultural grafting

Individuals select and amplify elements of their heritage and culture to forge their identity, drawing on countless other influences and inspired by global connectedness

### Closing Gender Gaps

Women represent an increasingly disruptive, collective force, overturning cultural norms whilst creating affirmative new forms of culture and community

### Access & involvement

Tapping into consumer creativity, collaboration is on the rise, as individuals want active involvement in, and the chance to make their mark on, their community and on the goods they consume

### Polarising Politics

Political identities become polarised within groups, as volatility and protectionism prevent openness to other points of view



# Identity

'Deaveraging' becomes an essential approach for meeting the diverse needs of consumers who identify with a broad variety of gender identities

## IDENTITY SPECTRUMS



### HOW IS THIS MANIFESTING?

*Through the eyes of our Streetscapers...*



Global

*"The Oxford English Dictionary added the gender-neutral title Mx to the dictionary and a recent petition has launched to require government bodies to use the Mx honorific. We still need to develop a deeper understanding of gender issues that include non-binary identities.*

MARTA, STREETSCAPER, LONDON



Sweden

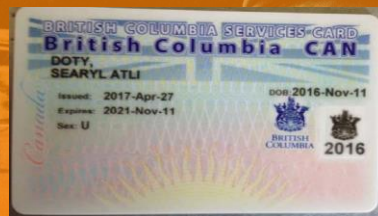
*Sweden takes gender issues seriously; for several years they have been introducing new legislation and have also launched gender neutral pre-schools. They have been praised as one of the most equal societies in the world.*

BBC, 2017



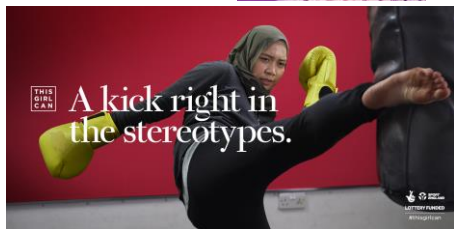
# Identity

## Identity spectrums



2017 saw the first baby receive no legal gender designation, with official documents stating 'U', meaning 'unspecified' or 'undefined'.  
(CNN, 2017)

**12%** of Millennials in the US identify as transgender or in some way gender non-conforming  
(Accelerating Acceptance, 2017)



**Global brands challenge perceptions of normal and do away with labels in 2018 comms**

McCain chips challenge traditional views of consumers through their adverts investigating 'What's normal?'

Smirnoff shouts 'labels are for bottles, bottles are for people'



**Male cosmetics lines in South Korea**

Korean men in their 20s use an average of 13 cosmetic products a month...

AmorePacific and Skinfood are capitalising on demand, and amongst varied target audiences from urbanites to army personnel



COMMUNITY &

# Identity

Individuals select and amplify elements of their heritage and culture to forge their identity, drawing on countless other influences and inspired by global connectedness

## CULTURAL GRAFTING



### HOW IS THIS MANIFESTING?

*Through the eyes of our Streetscapers...*

*There's a generation of young people that have grown up making the cultural commute between urban and township life (peri-urban). Today, that double knowledge is exploding into youth culture, especially through music, art and fashion. They have used their township and urban surroundings to create new sounds, new words, new shapes and new narratives.*



South Africa



Lebanon

*'Third culture kids' are the key to Beirut's progress and creativity; they are the plugged-in, proactive consumers who do more and demand more. They've been behind almost all the exciting new cultural ventures, incubators and start-ups that have galvanized Beirut's evolution*

*KASIA, STREETSCAPER, BEIRUT*

*MILISUTHANDO, STREETSCAPER, JOHANNESBURG*



# Identity

## Cultural grafting

12% of Millennials in the US identify as transgender or in some way gender non-conforming (Accelerating Acceptance, 2017)



Cultural grafters capture the South African youth population's imagination

Boys of Soweto singing group merge urban styling and sounds with township and rural traditions



Major markets talking candidly about multiracial realities

Japan - catching onto the rise of previously ostracised mixed race citizens (Hafu), forging their own hybrid cultures

US - The Race Card Project celebrates self-expression from those who represent a mix of ethnicities, rejecting labels

gotshakira Following when u meet a dude so quality u have to decide whether to seduce him or save him for friendship



1,843 likes





# Identity

Women represent an increasingly disruptive, collective force, overturning cultural norms whilst creating affirmative new forms of culture and community

## CLOSING GENDER GAPS



### HOW IS THIS MANIFESTING?

*Through the eyes of our Streetscapers...*

*South Korea's culture offers women few opportunities to be honest about their experiences with harassment ... But initiatives like Blind, an app for anonymous workplace messaging has sparked a wave of #MeToo stories, resonating with South Korean women...*



South Korea

*Gagyeong, South Korea*



China

*Sorority China is the first female-only co-working space in China, providing safe and affordable spaces for both co-working and co-living, aimed at professional women. It offers two locations currently, Shanghai and Beijing.*

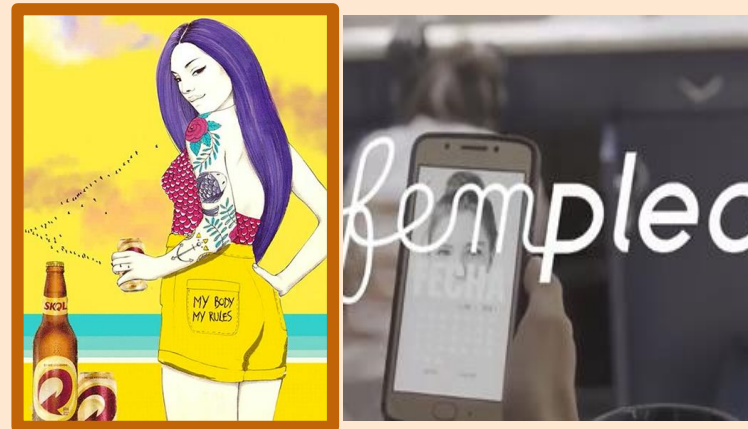
*Rose, China*



# Identity

## Closing Gender Gaps

Women make **85%** of all consumer purchasing decisions globally<sup>1</sup>



**Latin America making strides against sexism and towards equal opportunity**

Skol beer confronted their history to challenge a group of female artists to 'reposter' for them

Femplea labour bank app advertises services provided by women for women, from plumbing to accounting



**The Wing in NYC is a co-working & community space designed for women**

Part of a broader women's club movement sweeping developed markets, The Wing challenges elitism in a major city – but has been criticised for taking new age feminism too far; verging on positive discrimination



COMMUNITY &

# Identity

Consumer creativity is on the rise, as individuals want active involvement in, and the chance to make their mark on, their community and on the goods they consume



## ACCESS & INVOLVEMENT

### HOW IS THIS MANIFESTING?

*Through the eyes of our Streetscapers...*

*“Food and drink are some of the first sectors to really bring the average consumer in to the creation process. Some of the best places to eat and drink include ‘build it yourself’ aspects”*

*Stefano, Chile*



Chile



BLINDSPOT  
INITIATIVE

KICKSTARTER



USA

*“DEWALT, leader in the professional power tool sector, recently revealed that it has saved close to \$6 million in research costs along since launching its open insight community. This is a great example of the kind of collaboration we’re seeing”*



COMMUNITY &

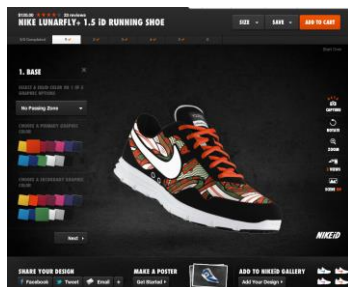
# Identity

## Access & Involvement



### 4 in 10

millennials globally are actively seeking opportunities to co-create products with companies



Whisky company lets consumers blend their own scotch through DIY kit or the online portal

Different degrees of on- vs offline personalisation available



Google creates new medium for artists to paint in, bringing about renewed interest in fine art

Tilt brush lets consumers paint in 3D space with virtual reality. A room becomes a canvas and imagination a colour palette, and users can walk around their art creations.



# Identity

Political identities become polarised within groups, as volatility and protectionism prevent openness to other points of view

## POLARISING POLITICS

### HOW IS THIS MANIFESTING?

*Through the eyes of our Streetscapers...*

*In South Africa, we're seeing an unfolding hyper-awareness of the economic, racial and gender disparities embedded in our society. The Born Free Spring is a wave of activism started by the youth generation who were never meant to know what apartheid is... They say things that older generations are afraid to say...*

*Milisuthando, Johannesburg*



South Africa



Sweden

*Countries like Sweden and Germany have struggled to integrate refugees, but this political tension has helped generate a wave of apps to connect refugees with their new neighbours... Users chat and arrange meet-ups, and can handle translation between Swedish, Arabic, Farsi and English.*

*Karin, Stockholm*





COMMUNITY &

# Identity

## Polarising Politics

**OVER HALF** of global consumers agree that they worry the values and traditions that they most appreciate about their country are being eroded by other cultural/global influences

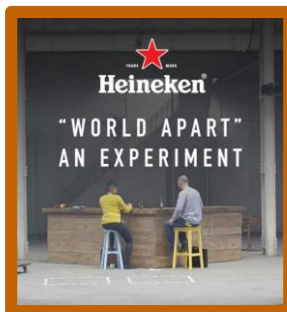
*(Global Monitor, 2017)*

Kitlenizin Gücünü Ortaya Çıkartın.



### digital handshakes, everywhere.

Even with good intentions, it can be overwhelming and difficult to know how to welcome someone to a new country. That's why we want to present the digital handshakes. A handshake is as easy as a like-button, except that it does make a difference in a person's life. Physical distance and language barriers don't matter anymore - now everyone can receive a personal welcome, one handshake at a time.



### German initiatives seek to close the gap between Europeans and immigrants

Start With a Friend connects natives with immigrants for business and social



**BRANDLESS**™



### Closed online groups like Pantsuit Nation foster outspoken political tribalism

Pantsuit Nation started as a secret Facebook group in the States, encouraging voters to wear pantsuits to polling stations in support of Clinton. It began as a group of thirty and now has 3 million members.



# Identity

## WHAT DOES A SUCCESSFUL FOOD OR DRINK BUSINESS LOOK LIKE IN 2025?

### IT HARNESSSES THE CREATIVITY OF ITS CONSUMERS

With inspiration and innovation coming from a diverse range of identities and cultural influences, enabled by digital platforms

### IT HEROES INCLUSIVE FUNCTIONALITY

Products and services are designed for efficacy and use by all people, regardless of orientation, meaning that messages of inclusivity go beyond brand comms and packaging

### IT IS A SOURCE OF JOY AND EASES TENSIONS

Within markets rife with political and societal tension, food and drink brands have an opportunity to generate happiness and bring communities together



197 backers

**\$10,835**  
pledged of \$10,000 goal

9 days to go

[Manage Your Pledge](#)

This project will be funded on Monday Jun 10, 3:07pm EDT.

Funding period  
May 8, 2013 - Jun 10, 2013 (33 days)

