



T/A

The Akin

Changemaker Report 2018

In partnership with Opinium

The Akin /

We are The Akin, a global, agile collective of freelance talent.

We're working to rebuild trust and restore faith in the insight, innovation and creative industries by creating a new operating model that puts transparency and humanity at the centre of everything we do.

Creating a business fit for the future.

Our Story /

Co-founders Anna, Helen and Sarah are a trio of global insight and strategy specialists with 30 years of collective experience.

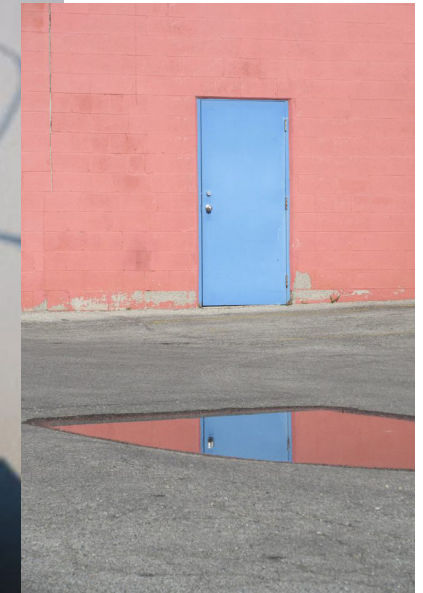
We have led innovation, research, futures, creative and strategy projects for a wide range of brands, from Nike and Sonos to Pernod Ricard and Google.

After working with numerous agencies in both permanent and freelance positions, we found ourselves increasingly frustrated by the dishonesty around agency transparency and agility.

Agency models are rigid, outdated and cloaked in mystery. We believe that it is time for a change.

Our Vision /

As a diverse group of thinkers, doers, provocateurs, creators and visionaries, it is our aim to bring specialists and clients closer together to work in a way that is honestly collaborative.



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Introduction /

2018 is going to be a year of breakneck shifts in consumer needs, fuelled by the continued discontentment of society, increased austerity and rapid technological advancements.

Industries and marketers are navigating a volatile and enlightened consumer landscape, one where they are assessed from every angle. There has been a seismic shift in transparency. From the #TimesUp campaign to the increasing prevalence of Blockchain, there is no room to hide - and toxic practices and processes will continue to be exposed in 2018.

As a business our core pillars at The Akin are humanity, transparency and agility, and we know that Changemakers morph both radically and very rapidly, and that to keep pace with them is imperative. For a brand to be successful in 2018 they must be in-tune and in-line with this group, as losing favour with them is only too easy, and impossible to regain once it's gone.

That is why we are launching our 2018 Changemaker* Report, digging deep into this group's beliefs and behaviours. *A Changemaker has many names: early adopter, progressive consumer, influencer, 'hipster'. They are the consumer group that drives change.

We hope you enjoy reading it as much as we enjoyed compiling it. Thanks to our partners Opinium who consulted, collected and consolidated the data. We hope you learn something to arm you for the year ahead, to inspire you, your teams and your business to make a positive change.

Happy 2018

Love, The Akin

Methodology /

We have studied Changemakers across 10 global markets, questioning their life goals and values, wants, needs and behaviours, and attitudes to brands and industries to provide a clear 360-degree picture of them. We have also tracked our July 2017 predictions and in this new report we show their manifestations and mutations through case studies.

Many reports claim to understand this desirable group and make proclamations on how their actions and behaviours will trickle down to the masses. To ensure our thinking, qualitative research and expert opinion was rooted in robust data, we collaborated with Opinium Research who used their global network to bolster our predictions.

Opinium conducted The Akin's survey with 2000 online changemaker interviews (early adopters engaged with culture and politics aged 18-45): 200 each in the UK, Brazil, France, Germany, Russia, China, South Africa, the US, India and Australia.

Opinium's data analysis is highlighted in pull-out boxes and italics throughout the report.



Opinium /

Opinium is an award winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on pulse of what people think, feel and do. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and overcome strategic challenges – helping them to get to grips with the world in which their brands operate. We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes.

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The 2018 Changemaker /

A Changemaker has many names: early adopter, progressive consumer, influencer, 'hipster'. They are the consumer group that drives change.

If a brand gains advocacy with this group, it won't be long until the mass market follows. They are a marketer's achilles heel - they rapidly change and are hard to please, and falling out of favour with them can be fatal.

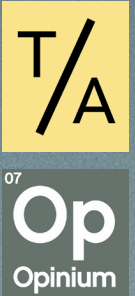
This group are also the most difficult to understand. They evolve constantly and sometimes in no logical manner. They remix their multifaceted identities, depending on mood, environment, company, and even time of the day or week. They don't fit into simple boxes or pre-defined subcultures.

Due to their fickle interests and fast-changing needs, the best way to define this group is by their attitudes and values. These are extremely important to them; their moral compasses are strong and undeterred. Understanding this is crucial to any brand or business wanting to engage with them.

This is just the start of the process of defining this group's attitudes and needs, and for every industry and brand it will be nuanced and slightly different. The following attitudes and behaviours explore the ways this group are living now, and how that will develop in the near future.

Attitudes /

We investigated the key values and attitudes that are affecting every decision Changemakers take. We wanted to truly understand what the real reasons behind their life choices were. Interestingly, when discussing the values, Changemakers organically move to discussing brands and see little difference between how they operate and how they expect brands to operate. We explored what Authenticity, Conscious, Convenience, Contentment, Freedom, and Luxury really mean to them, how they think about Politics, Sexuality, and Spirituality, and how this will develop in 2018 and beyond.





Authenticity /

Authenticity is a term much abused and misused by brands, but the concept behind it - that of having a strong character and acting with integrity - is even more vital in 2018. For Changemakers it is the most important attribute across the board.

Authenticity does not equal craft - it is not heritage or artisanal - unless that actually is who you are. It is also not about "being real and down with the kids" if you are a geeky finance brand. It is about being your true self, warts and all.

Authenticity is also not static, it changes, it is about being agile and adapting to the times without losing sight of who you are.

Changemakers want to question and confront societal norms. It is not about shying away from weaknesses but rather displaying vulnerability, glorifying our very humanness, and they expect the same openness from brands.

In the community that congregates around streetwear brands, there exists a belief system that makes them - and by extension that brand - authentic. Perhaps the most successful embodiment of this ideal is American menswear brand Noah. The brand's founder, former Supreme creative director Brendon Babenzien, pens the majority of their blog posts, which lends him and the brand an uncommon air of accessibility and authenticity.



Opinium Analysis

Authenticity and integrity are the personal aspirations of Changemakers. For 93% authenticity is the most important trait to have, and 87% monitor their own authenticity. There is a clear desire for integrity - when interacting with others they expect integrity in anything anyone does (91%)

Conscious /

The idea of being a conscious or low-impact consumer is not a new one, but the speed of change, and the depth of feeling of responsibility has markedly heightened. This sense of responsibility encompasses a drive for diversity and sustainability with humanity at its very core.

Changemakers don't want to, and won't accept, feeling powerless. According to the American Psychological Association, "people are deeply affected by feelings of loss, helplessness and frustration due to their inability to feel like they are making a difference in stopping climate change"

Being value-led is not just for the few. And those privileged enough to be making life decisions based on social, political or ethical beliefs are increasingly doing so.

For brands, bolt-on CSR or diversity campaigns are an embarrassment and genuine change is needed to satisfy Changemakers.

Brandless is a new online marketplace that enables consumers to access products that are aligned with their social, religious or environmental values at a low price point by cutting out what it calls a 'BrandTax™' – the hidden costs you pay for products from a named brand, which can increase beauty products such as face cream by 370%



Opinium Analysis

Changemakers have a greater sense of community and society with a strong faith in humanity (82%). A part of this is looking to preserve culture for the future, with 91% actively trying to become more sustainable and 87% believing that diversity in all parts of society is crucial to their future.

Convenience /

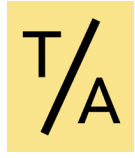
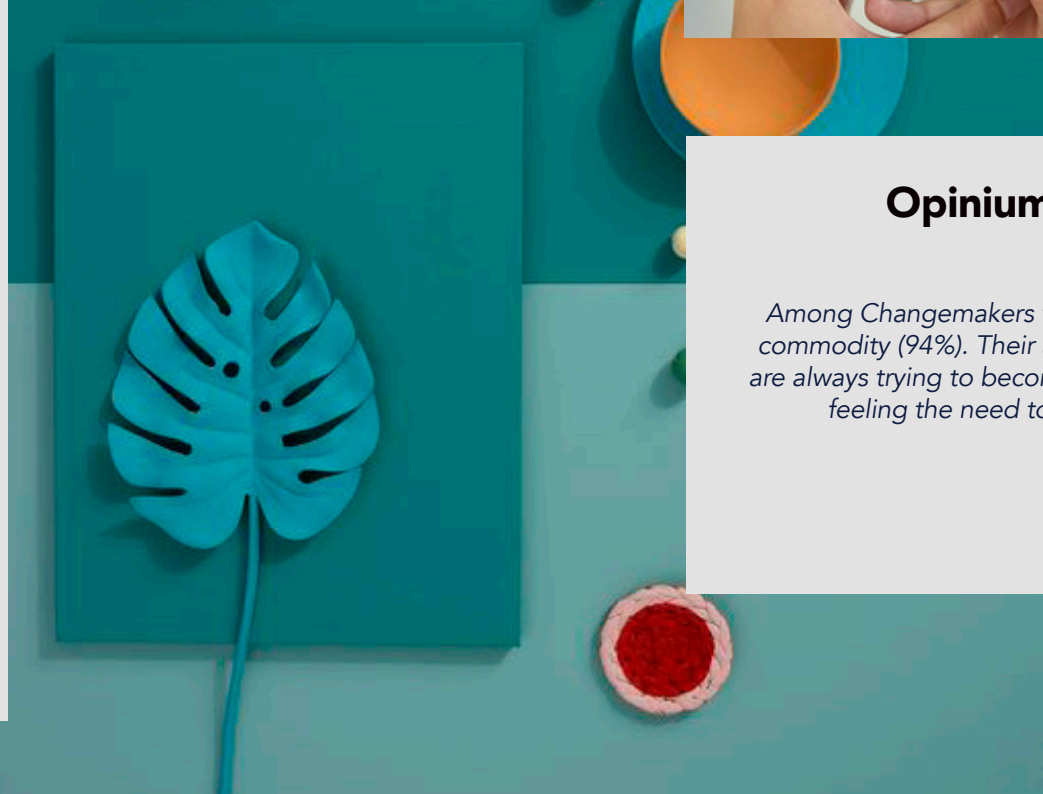
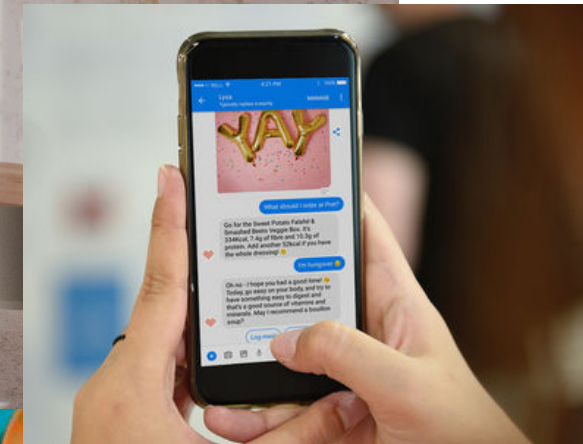
Convenience is not a straightforward concept for Changemakers. If time is the most valued commodity then how you choose to spend it is incredibly powerful.

The drive for efficiency and seamless services is about freeing up time, to spend more time engaged and invested in more experiential and rewarding activities.

The desire for slowing down lingers, and the idea of finding joy in the seams, the snags and friction points still exists.

Improving brain function, ability to focus and cognitive abilities to be able to stop multitasking and complete tasks quickly and efficiently has also led to new brand innovations.

Lysa uses AI to offer consumers an easier way to make more informed food choices. While the platform works by getting smarter in line with your physiology, goals, lifestyle and tastes, it is the way in which the technology communicates that makes it a success. Although all of the content is based on scientific research, it uses a lot of animated GIFs and emojis to keep it light and not time consuming - users receive short messages rather than long articles.



Opinium Analysis

Among Changemakers time is their most precious commodity (94%). Their actions reflected this - 91% are always trying to become more efficient, with 84% feeling the need to streamline their life.

Contentment /

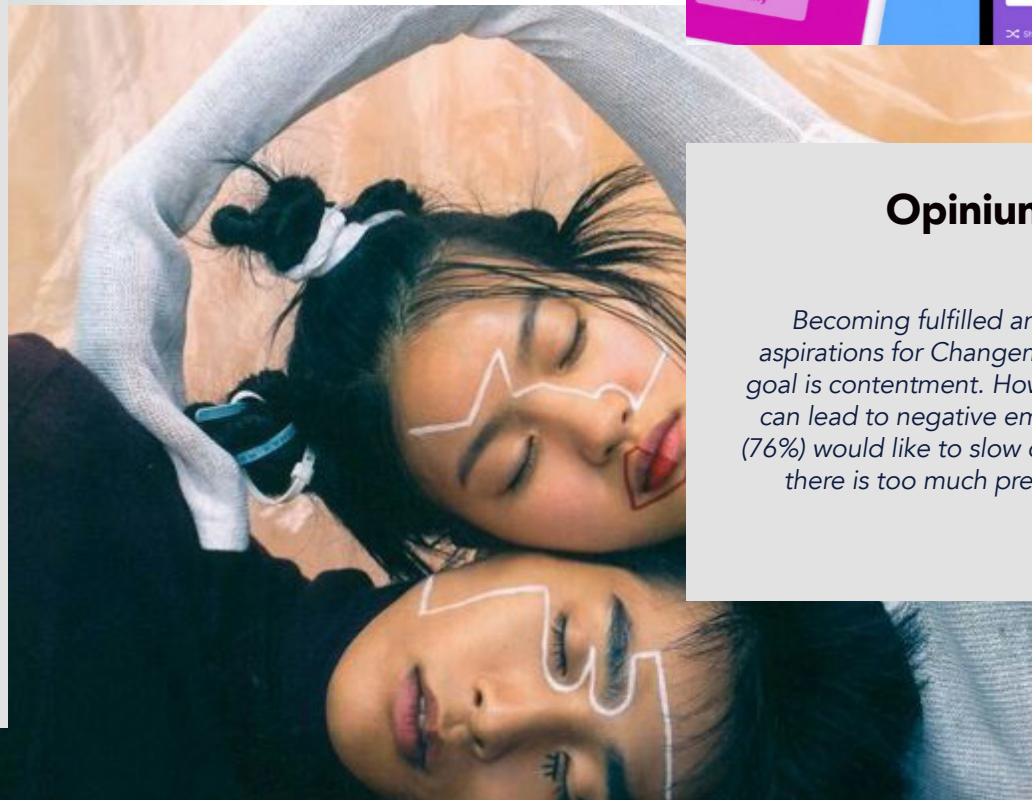
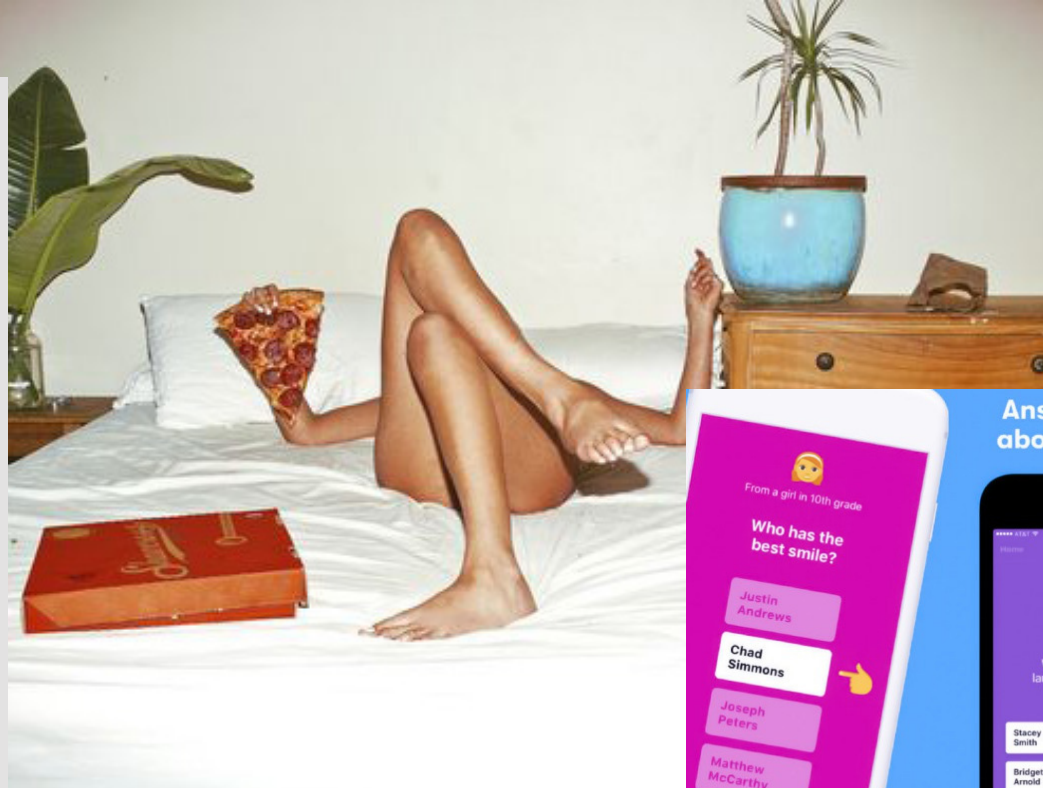
In our last report we talked about happiness goals - happiness that isn't dictated by financial or professional success.

Studies have shown that individual happiness has started to strongly correlate with national GDP. However, we see a move beyond this to Changemakers actually seeking a feeling of contentment.

The beginning of any new year sees people reassessing their lot and setting intentions for the next 12 months, but for Changemakers there is a definite ongoing shift towards genuine fulfillment and personal worth. This takes priority over competition and attainment among this group.

This can sometimes come at a cost, with the quest for betterment taking an emotional toll, but the acceptance of setbacks and personal flaws is considered an integral part of the process.

Tbh (to be honest), is an anonymous compliment app. Users can post kind words about their peers anonymously and receive points from other users for their efforts. Facebook recently bought it for £76.3m.



Opinium Analysis

Becoming fulfilled and happy in their lives are aspirations for Changemakers; for 89% the ultimate goal is contentment. However, the pursuit of this goal can lead to negative emotions. Over three quarters (76%) would like to slow down more and 78% feel that there is too much pressure to always be happy.

Freedom /

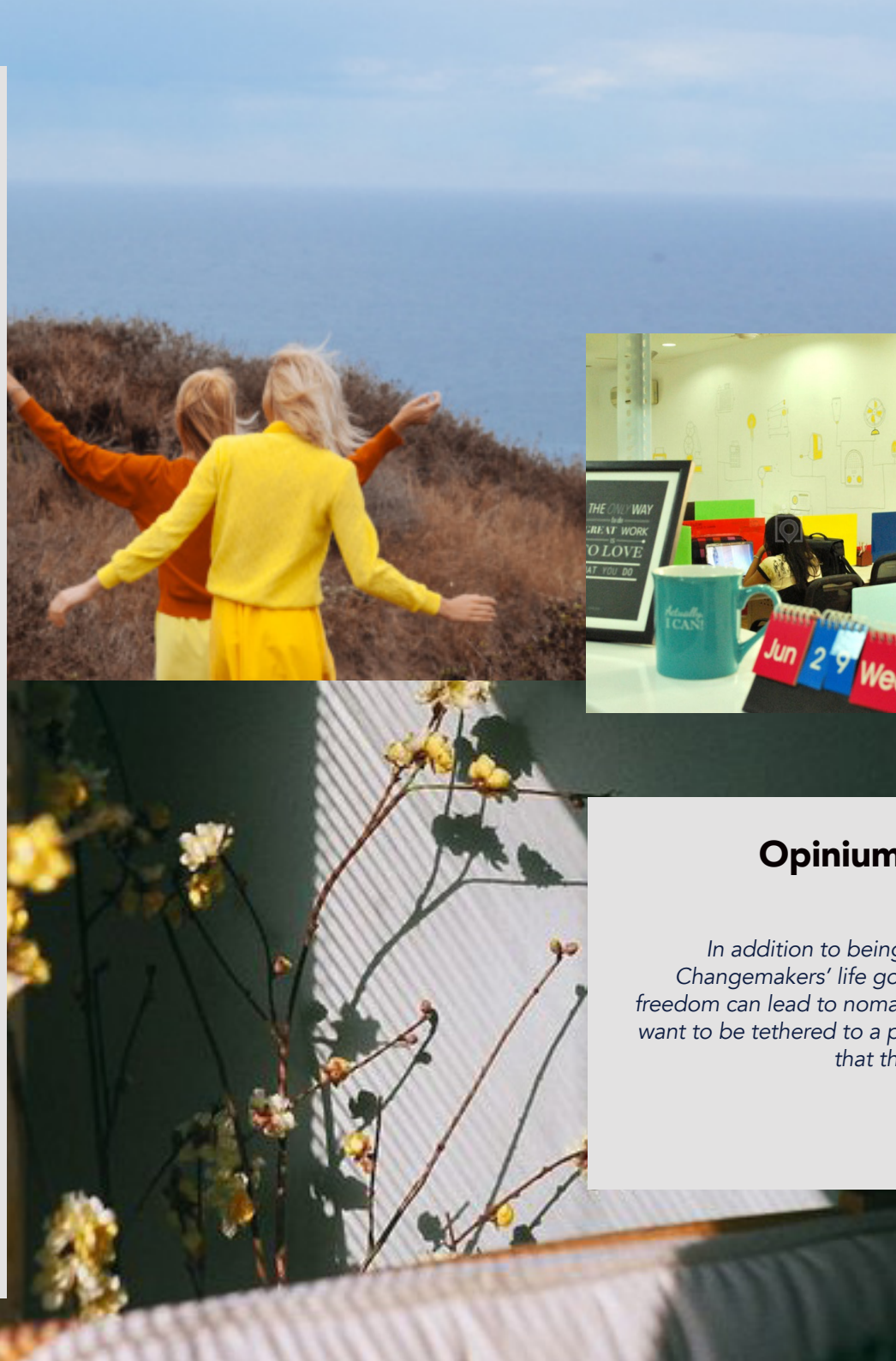
We know that Changemakers' dreams are not of traditional markers of success or possessions. The driving force is a dream of freedom and their passport is their most cherished object.

Freedom is not just about being untethered geographically - although that is a huge part of it - it is about freedom of identity to be and to behave without imposed limits. Ideas of nationality, sexuality and gender are continuing to evolve.

The restrictions of austerity have created new desires, if home ownership is not a possibility and financial security unlikely, this group will continue to find new ways to feel fulfilled.

Perceptions of freedom differ from person to person.

The NQube co-working space in New Delhi, India, offers a 'graveyard shift' membership plan (available from 10pm until 8am) for global workers on different time zones.



Opinium Analysis

In addition to being content, freedom is Changemakers' life goal (92%). Their quest for freedom can lead to nomadic lifestyles, as 83% do not want to be tethered to a place because of the objects that they own.

Luxury /

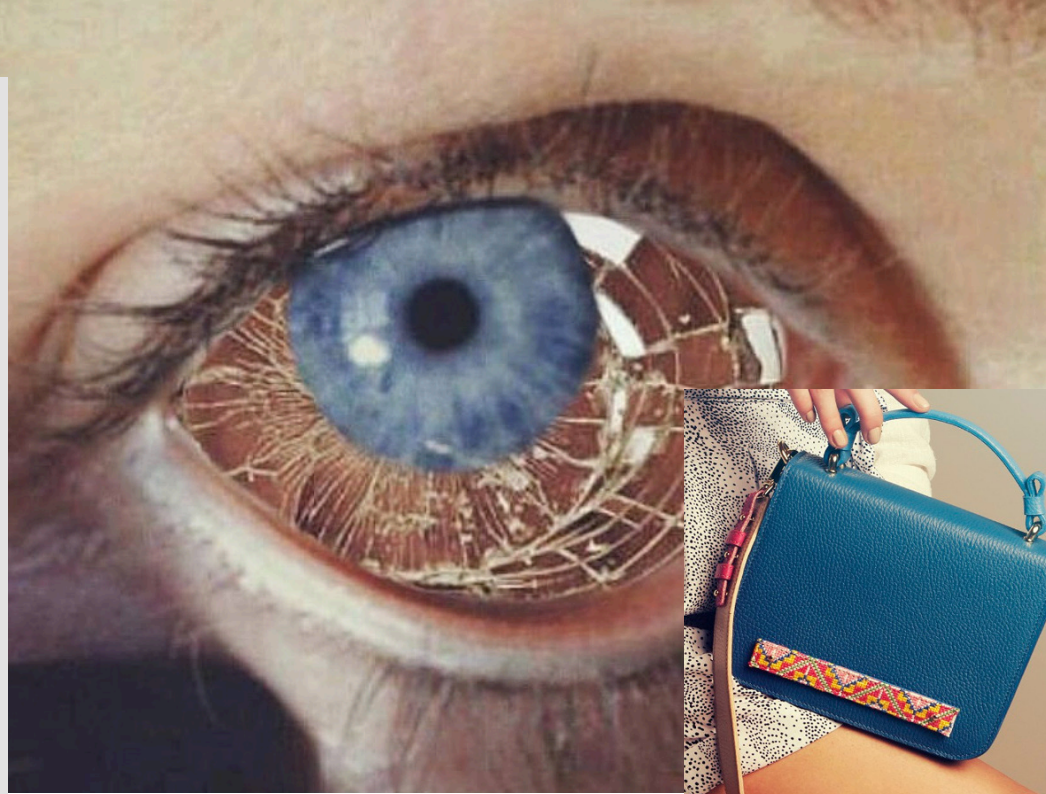
For Changemakers globally, luxury is not a category. It is not something that can be bought. It is not about products. For Changemakers it is definitely a feeling.

The bad news for brands is that this feeling is “intangible” and much like freedom, with which it can be intrinsically linked, it differs from person to person.

What is true is that the idea of exclusivity is still key to luxury, but that this too has morphed. Exclusivity defined by price is no longer relevant. Now exclusivity is about rarity of experience.

Luxury can also be about the ability to invest your money in lesser-known causes, or feeling like you can effect change with your purchasing decisions.

[Palestyle](#), a luxury handbag line from the United Arab Emirates with embroidery hand-stitched by female refugees, relaunched in 2017. It donates a percentage of its sales to development projects in the camps.



Opinium Analysis

Luxury to Changemakers isn't an object, it is an intangible experience or feeling. 82% believe that luxury is services and access, not ownership, and a further 87% think that it is experiences and not objects.



Politics /

We have expressed previously how value sets and personal ethics affect how Changemakers behave on a daily basis, from their interactions with brands to choosing a holiday, a city to live in, or a company to work for.

What is abundantly clear is that traditional single or two-party politics does not resonate with this group and they do not consider it the future.

Changemakers are actively involved in local issues such as housing or air pollution and equally engaged with global issues that do not affect them personally, but go against what they hold to be right or fair.

This group are well-informed (although the desire for more knowledge is strong) and aware of changes that need to be made, but conscious that beyond protest and debate, radical solutions are needed to effect such transformations.

[Azeema](#) magazine is a modern platform for women of colour from North Africa and the Middle East. The magazine looks at issues of identity, race and gender but also serves as a way in for its Western readers to better understand the Islamic faith.

A photograph of a hand holding a white protest sign. The sign has text written in red and blue marker. The background shows a city street with buildings and trees.

So bad,
even introverts
are here.

Opinium Analysis

Changemakers are increasingly becoming disaffected by politics and government - 79% believe that the future of politics is not the current parties in power. Furthermore, 77% would like to have a better knowledge of politics.

Sexuality /

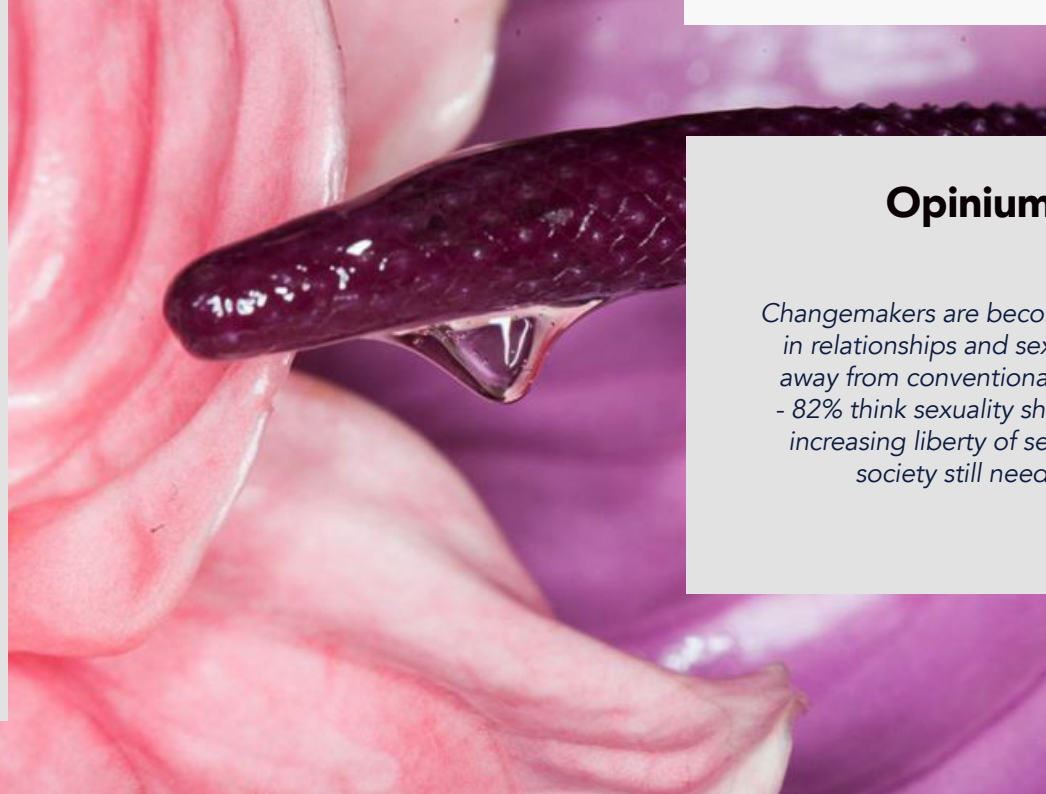
The tide of sexuality is fundamentally turning.

The focus of sex discussions over the last few years has been on fluidity of sexual preference, but going forward Changemakers are approaching the previously taboo topics of pornography, sexual enjoyment and liberation in new ways.

Inclusive and forward-thinking brands are offering well thought-out products that speak to sex as part of the holistic wellness movement and shifting the focus away from the realm of secrecy and shame.

In a charged environment where sexual assault horror headlines greet us daily, Changemakers are carefully navigating this landscape to celebrate pleasure and consensual relationships whatever their form and call out inappropriate behaviours.

Maude is a range of intimate products (toys, lubricants, condoms), created by two female designers in the US. They say "we created maude to simplify sex. tired of seeing an outdated and gendered approach to a human experience both on the drugstore aisle and in the industry, we said enough: let's make sex better for all people"



Opinium Analysis

Changemakers are becoming increasingly liberated in relationships and sexuality. They are stepping away from conventional ideas of binary sexuality - 82% think sexuality should be fluid. Despite the increasing liberty of sexuality, 76% believe that society still needs sexual liberation.

Spirituality /

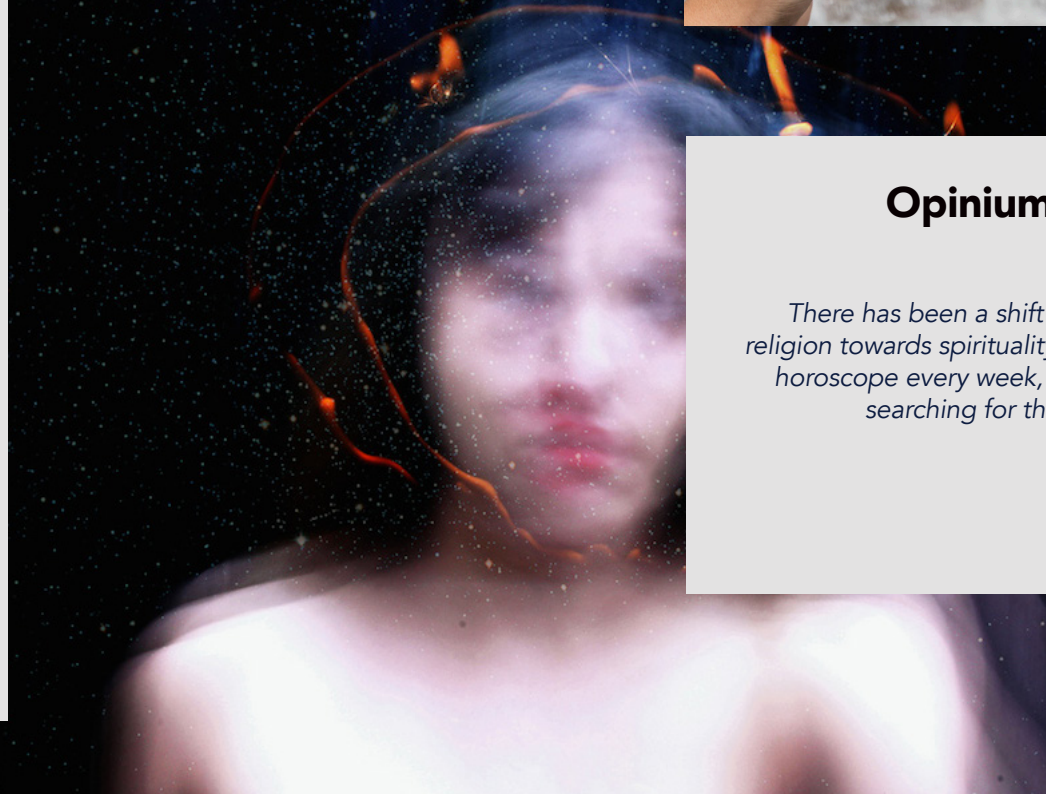
The search for contentment and personal freedom in uncertain times has seen a huge resurgence in spirituality and non-traditional faith over the last few years, this much we know.

In 2018, Changemakers will continue to look for solutions and/or escapism, but more than that the search for the meaning of life has greatly intensified.

In a world where little makes sense, reading horoscopes has been legitimised and modern witchcraft apothecaries are appearing in city centres.

Going forward, this non-conventional spirituality is moving from a personal passion to group pursuits, as - much like church-goers found for many years before - congregating around shared ideals helps people feel less alone.

The [Ultimo Hotel](#) in Sydney bases room allocations on guests' horoscopes. Food, drink and experience recommendations are also all specifically tailored for their sign of the zodiac. Guests receive a moon calendar and a personalised star chart on arrival, followed by an hour-long one-to-one astrology reading with the in-house astrology team.



Opinium Analysis

There has been a shift away from conventional religion towards spirituality. Two fifths (41%) read their horoscope every week, with 81% saying they are searching for the meaning of life.



Behaviours /

In our second section we explore how these deeply held values are affecting how this powerful group are behaving across key categories.

We dig into: Fashion, Finances, Food & Drink, Health, Media, Retail, Self Care, Sports & Fitness, Tech, Travel, Work & Education and provide illuminating global case studies of brands leading the change in and across these industries.

Fashion /



Health /



Finance /



Media /



Food & Drink /



Retail /

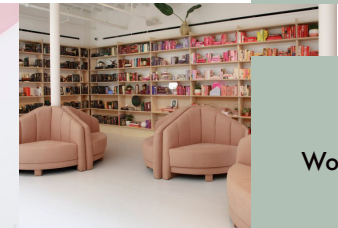
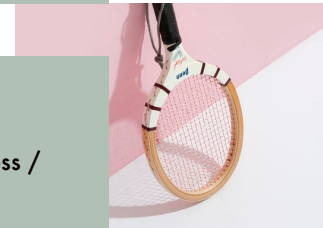


Self Care /



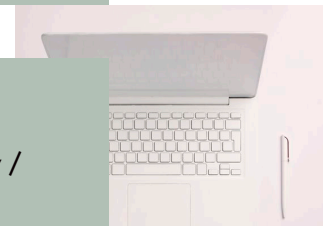
Travel /

Sport & Fitness /



Work & Education /

Technology /



Fashion /

Ironically, fashion seems to be lagging behind the trend curve. It is struggling to keep pace with tech innovations (unlike some of the more agile industries) and still producing huge amounts of waste and environmental damage through dated processes.

A dumbing-down of fashion has seen a plug and play approach where even couture designers are turning to youth streetwear, and the offer across fashion media is of a tired high/low brand mix formula. This may give an accurate picture of what Changemakers are wearing, but not what they find inspirational. But perhaps menswear is our saviour.

Change is coming in 2018, spearheaded by conscious consumers: we will see major growth in the second-hand industry. The second-hand apparel industry is forecast to grow by a staggering 11% per annum (Forbes, 2017), reaching \$33bn by 2021. We will also see a drastic move away from paid influencers; renewed emphasis on supporting local designers; and quick and dirty tech innovations shaking things up.

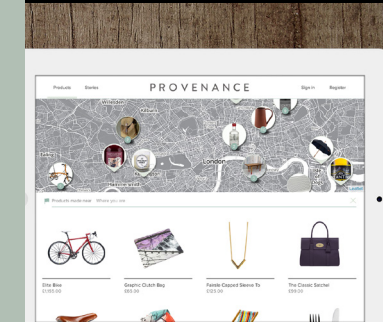
[adidas](#) is teaming up with Berlin's transport authority BVG to offer customers a year's worth of free subway travel when they buy a pair of limited-edition trainers. The shoe design incorporates BVG's multi-coloured seat upholstery pattern and the annual pass is assimilated into the tongue.

Changemakers' move away from Fast Fashion is echoed by H&M's next move; the affordable luxury label [Nyden](#). From Cos to Arket, the Swedish monolith is investing in a simpler minimalist approach with better, more sustainable materials.

The [Provenance](#) platform empowers brands and designers to log the supply chain details of their collections onto blockchain. As garments become digitised, the supply chain data can evolve into storytelling about the product journey beyond store delivery.

Opinium Analysis

Changemakers tend to invest in clothing to last more than 4 seasons (68%) rather than buying big ticket trend-led items. Companies play a large part in this - for 56% their inspiration comes from brands rather than the street. Though as we know, they are interested in the next with 56% agreeing they prefer to find new designers and support new talent.



Finance /

Fintech and its disruptors will be put into the spotlight again in 2018, as former bank upstarts like Monzo and Atom become institutions in their own right and are pressured to prove they deserve the mass of investment they received in 2017.

Financial innovation is not enough. Changemakers expect transparency and sustainability from their money services.

The aspiration of ownership is not actually dead, and Changemakers are finding new solutions through the sharing economy to incorporate saving and planning for the future. They are also more than willing to barter and exchange their data and influence.

A lot of traditional media may have their head in the sand about cryptocurrencies, but the reality is that it's here and it is not showing any signs of disappearing, so even mainstream brands need to be inventive and incorporate it into their planning.

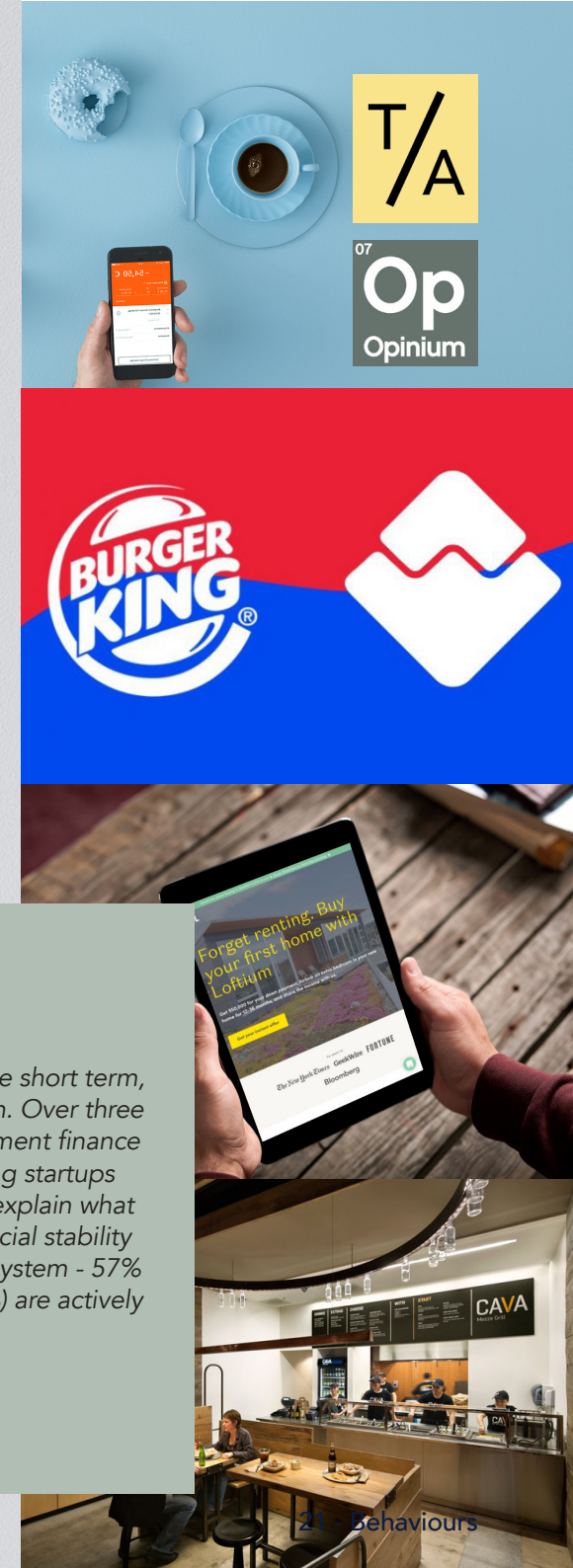
In Russia, fast food chain Burger King launched the [Whoppercoin](#), a new cryptocurrency billed as a 'blockchain loyalty programme'. Consumers are given one Whoppercoin for every Rouble they spend with the brand.

[Loftium](#) is a Seattle start-up that aims to transform home ownership for those struggling to save for a deposit. The company offers prospective home-buyers up to £37,583 (\$50,000, €42,180) towards a deposit in return for shared Airbnb income from renting out a spare room for 12–36 months.

US-based Mediterranean restaurant chain [Cava](#) plans to launch a data-driven loyalty programme that will offer bespoke discounts to consumers not only when dining in its restaurants, but also when they buy the brand's products in other stores, such as Whole Foods Market, My Organic Market and Balducci's.

Opinium Analysis

Changemakers are financially literate in the short term, however they may struggle in the long run. Over three fifths (81%) use platforms or self-management finance tools. 78% are interested in new banking startups such as Monzo. 84% think that they can explain what Bitcoin is. However, their long term financial stability feels problematic in the current financial system - 57% have a pension, and only three fifths (60%) are actively saving to buy a home.



Food & Drink /

Changemakers know that what they eat is a political and social act. Contrary to the right-leaning press belief that it's just a Millennial fad, we have seen a rise of food consciousness and it's not just Netflix viewers or niche animal activists. 2018 will be the year vegan goes mainstream.

As much as Changemakers love a new ingredient or superfood (raw water or purple sweet potato), there will be more available information than ever about what they put in their bodies and how it affects them.

Beyond this we will also see less costly, more efficient, ethical delivery solutions provided for these impatient, on-demand consumers, with more off-site and dark kitchens as cheaper alternatives to high restaurant rents.

Pizza Hut is currently trialling vegan cheese in five of its branches, and McDonald's has launched its first McVegan burger, featuring a soy-based patty. Even UK chicken chain Nandos has a vegan offer.

Subscription service [Euphebe](#) bills itself as a "health company whose prescription is food." Euphebe's meals are plant-based, vegan, and come with nutrition coaching - a month long programme designed to break what it calls the "Crappy Food Cycle" for good.

[Daily Harvest](#), the frozen food delivery service which until now has focused on lighter breakfast options and snacks, is diversifying its offer with the launch of a new, more substantial range of vegetarian food bowls. Consisting of six dishes, the new line incorporates an eclectic mix of exotic ingredients such as chimichurri, kimchi, kitchari and tahini.



Opinium Analysis

Changemakers are becoming more aware of what goes into their food, with 69% buying as much organic and ethical food as they can, and 70% always knowing every ingredient in what they eat. They do not just seek out ethical practices in the food they consume, but the environmental impact is of paramount importance. 55% are actively reducing their meat consumption, with an additional 78% more conscious and selective when it comes to food packaging.



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**MODERN
DIET**



Health /

Changemakers are time-poor and aware that systems are failing, they are not prepared to wait for appointments or infrastructure transformation that is not forthcoming, so they are taking things into their own hands, whether digitally, alternatively or mindfully.

Changemakers are thinking of and providing for their future selves through DNA and genetic understanding among other things.

We have seen the repeal of Obamacare in the US, continued dissolution of the NHS in the UK and inconsistency of care globally and across consumer groups, leading to a growing need for efficient, convenient and cost saving alternatives to traditional medical providers.

Startups and traditional providers are acutely aware of the need to explore solutions that provide physical and mental wellness for the masses - not just the privileged few and there will be a growth in new collaborative care systems.

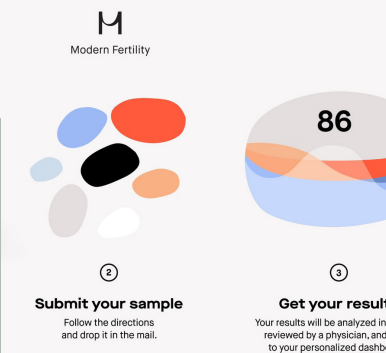
Swedish based **KRY** is an on demand-doctor app, transforming the world of healthcare by making it more accessible and convenient. With KRY's app you can meet a doctor or therapist at any time or location. Users can order prescriptions to their homes and get referrals to specialists.

Modern Fertility is an at-home fertility kit. Subscribers submit four drops of blood to a laboratory, which are analysed for 10 key fertility hormones. The results are broken down online to offer a clear picture of hormone levels.

Well Told Health is an online pharmacy brand offering organic, whole-food, vegan supplements. Founded by Monica Ruffo, the brand hopes to educate customers on the ingredients in each product and their individual health benefits. The company, which was launched at the end of 2017, has now introduced a new vitamin D Booster to its range.

Opinium Analysis

The trend towards a wider description of wellbeing is clear. The vast majority (91%) actively care for their mental health and 87% consider their mental and physical health holistic. There is a new interest in a deeper understanding, 69% wanting to have a DNA test to understand their genetic makeup better. There are also new approaches to maintaining health, 74% believe, use or are interested in alternative medicines.



Media /

Changemakers are continuing to consume massive amounts of rectangular content and are looking to their favourite platforms to surprise and delight them with new genres and formats.

The need for curation in this world of endless content continues and Changemakers desire an easy-to-digest, single stream of information and entertainment rather than jumping between multiple platforms.

Although ease of delivery is key, last year there was huge awakening of the danger of existing within media echo chambers - this has extended beyond news to entertainment and culture as a whole. Changemakers are looking for content, which offers a multitude of perspectives and gazes be it female, black, trans, and beyond. They are celebrating new talent that can open their eyes and minds to new ideas as well as educating themselves on issues past, present and future.

Immersive entertainment is also here to stay, engaging multiple senses, emotions and realities at once. Content must make Changemakers feel something.

Kemet is a radio station transmitted via the Cairo Metro's public address system. Broadcasting every day, the shows have been designed to suit all ages and backgrounds, while avoiding topics such as politics and religion.

Netflix worked with a California-based cannabis dispensary to launch 10 new strains of medical marijuana. Themed around shows such as Grace and Frankie and Arrested Development, the collaboration offered a tongue-in-cheek acknowledgement that the brand is already intrinsically linked with cannabis consumption, through the idea of Netflix and chill.

Them is a next-generation community platform that chronicles and celebrates emerging and inspiring stories, people and voices, ranging in topics from pop culture and style to politics and news, through the lens of today's LGBTQ community.

Opinium Analysis

Content is still king, and the medium it is delivered on is highly important, as 42% agree that the delivery format of content is important. Consumption of content is changing - consumers are wanting the content to be immersive and interactive (47%). With the multitude of different media platforms, it can be exhausting checking each, this has led to 37% wishing that their content was in one stream or source.

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Retail /

For Changemakers the retail sphere is an oxymoron. Yes they want efficient digital solutions, but they equally want incredible sales service and experience when they venture in store. To achieve both needs at the level expected is difficult to attain, and in many cases not worth pursuing.

What young and more agile brands have been able to do is get one offer right first and slowly expand to deliver on the other. Old institutions and market leaders that activated their online presence in 2006 have still not yet caught up. Changemakers hack the system and order products from these brands through huge aggregators to receive them the next day.

An added issue is that there has been a levelling of the retail playing field, where many Changemakers now know as much, if not more, than sales associates, so a hard sell and traditional store models feels outdated and uninspiring.

Currently, a regularly-used strategy is to throw tech at the problem, and mass retailers are experimenting with new methods of engagement (AR & VR), same day delivery and hyper-personalised shopping services - some more successfully than others.

Walmart's tech incubator Store No. 8 is testing a new personal shopping service to streamline the shopping experience. The service allows customers to text through their order which is couriered to their door free of charge.

MySize is an Israeli smartphone technology that enables consumers to measure themselves using their iPhone and, once a size has been determined, match that consumer with products in their size online.

Amazon has opened more than a dozen brick-and-mortar bookstores in the United States. Books are selected by algorithm and there is a "highly rated" table for books that score 4.8 stars and above on Amazon.com. There are steep discounts for members of Amazon's Prime loyalty program.

Opinium Analysis

The proliferation of accessible information has informed Changemakers' decisions to an almost expert level in certain areas. When shopping these Changemakers are now armed with so much information that three quarters (75%) rarely ask shop assistants because they know as much if not more than them. As with media, there is an expectation of personalisation of the shopping experience both online and offline, which could be a key area since over half (54%) believe that shopping in store isn't convenient.



Self Care /

Beauty, self care, wellness - these words are part of the Changemakers' everyday lexicon. What is apparent is that brands have calculated the financial prospect of this quest to betterment, and are increasingly building wellness triggers into products and campaigns - sometimes tenuously.

Excitingly in this area, innovation continues, from ingestible skin solutions and ameliorating fragrances, to hyper-personalised products, and internal and external toxin removal.

For brands in this space the “*Glossier effect” (*the act of building a brand in the Insta-age) has blown traditional marketing apart, and what we will definitely see is companies big and small trying to replicate this success.

L’Oreal, announced the release of [Botanea](#): its first line of 100 percent plant-based hair dye, created in response to consumer demand for naturally-formulated hair products. This is part of L’Oréal’s goal to commit to entirely sustainable product development by 2020.

New York-based [Meant](#) brings a more focused approach to bodycare, positioning its products based on need rather than body part.

[Hims](#), is a new men’s care brand tackling men’s care in a modern way. The range of shampoos, serums, vitamins and pills that cater for both baldness and erectile dysfunction are bought through a new online platform that offers a new visual aesthetic.

Opinium Analysis

Within self-care there is a tendency towards niche innovative companies - 70% are willing to try out new brands and 80% like to try innovative options, such as new formats such as ingestible supplements. They are also highly concerned with not just the traditional impacts on skin but ones of the modern age, as 70% are actively seeking pollution protection in products.

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Sports & Fitness /

The wellness epidemic of recent years has led to an increased fitness focus and seen an over-quantification of the self: counting calories, miles cycled and steps taken, and some more negative outcomes including body shaming and disorders.

Changemakers feel an acute pressure to be into fitness due to both social pressures and increased knowledge of future health concerns.

In 2018 they are placing more emphasis on re-developing their uniquely human skills, identifying ways and techniques to listen to and trust their bodies and senses more. Moving away from the quantified self to the instinctual athlete. This includes pushing the body to its extremes to really test what it can do.

Changemakers are seeking out collaborations and activities that blend multiple interests and techniques together for maximum impact within minimal time.

POPiN caters to casual fitness routines, letting users bypass expensive day use fees meant to encourage people to purchase memberships. The founder explains, "I'm not against membership... I'm against membership if you don't use it." The startup is for the customers who don't plan on ever signing up for full memberships, but are still willing to pay good money for some quality gym time. So far, the app is only available in NYC.

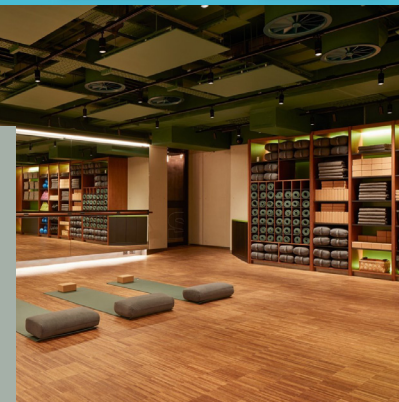
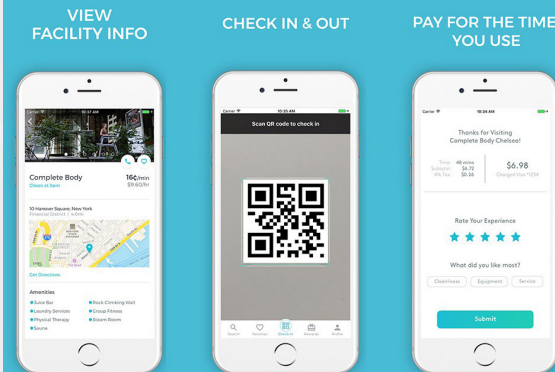
KXU requires no fee and prices classes at just £24 (\$32.14, €27.26). The club offers more than 80 classes that range from strength to cardio and stretch, and has a five-room beauty and wellness clinic that includes a cryotherapy chamber, an infrared sauna and a sports clinic.

Australian surf and skate company **Ozmosis** offers customers discounts starting at \$20 for displaying their injuries. To get the discount, online shoppers need to upload a photo of their scar with the hashtag #PayWithPain, or in-store shoppers can simply show their injuries.



Opinium Analysis

52% of Changemakers are exercising regularly, though interestingly 66% feel pressured by society to be into fitness, particularly women. This pressure often comes from social media, and we are seeing a growing rejection of influencers with 37% not finding Instagram fitness influencers inspiring. There are two key trends in new exercise - 75% of Changemakers want to push themselves to the extreme to see how far they can go and 70% like to try innovative formats of sports/fitness i.e. HIIT, suspension yoga



Technology /

Changemakers are excited by technology and its creation of the future, yet accept that they are too overly reliant on it and find its ethics questionable (but are all eagerly awaiting 5G)

Tech experts believe no industry will move forward without AI, and that 2018 will be the year that people really start to have meaningful relationships with their robot friends. Changemakers are definitely not adverse to new developments and are happy interacting with bots and experimenting with face and eye recognition, but they are less convinced by current applications of VR.

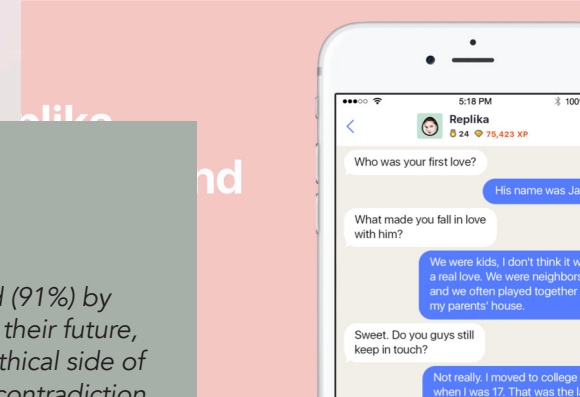
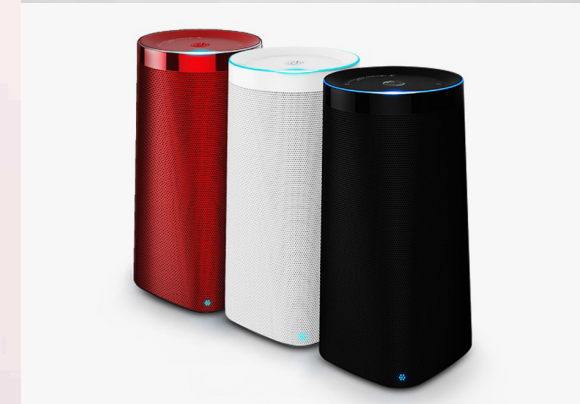
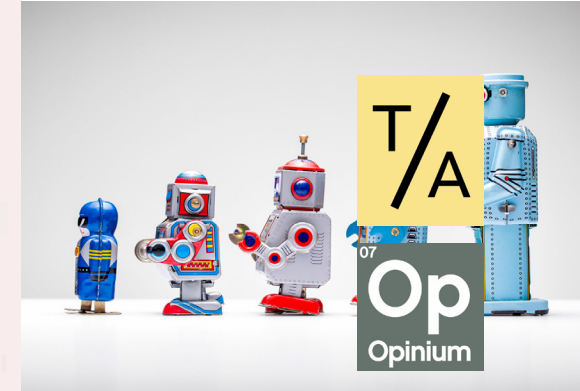
As voice control continues to penetrate spaces, Changemakers are forming comfortable bonds with their digital assistants and are increasingly happy to subcontract tasks such as purchasing, just like their rapid adoption of Sally SatNav back in the 00s.

We live in a post internet world that is yet to be fully formed, and Changemakers realise that rules and regulations need to be put in place to ensure a level of etiquette is developed around this new world. And as we move into the next billion internet users, they are fully aware that it could change the way the internet works.

In China, [LingLong](#) launched the DingDong, its answer to the Amazon Echo and the Google Home. This smart speaker understands Mandarin, Cantonese and basic English, reaching a new and massive audience.

[Replika](#) uses AI to create a chatbot in your likeness. Over time, it picks up your moods and mannerisms, your preferences and patterns of speech, until it starts to feel like talking to the mirror — a “replica” of yourself..

Smart computing is moving from the Internet of Things to the Internet of Eyes. Alibaba affiliate Ant Financial is trialing a “smile to pay” service at KFC. No smartphone is required, if customers have already enabled facial recognition through Alipay.



Opinium Analysis

This group are overwhelmingly excited (91%) by technology and its role in the creation of their future, although 77% are concerned about the ethical side of the tech. In doing this they have created contradiction between knowing that they rely too much on tech (82%), and seeing uses for VR and AR in their lives (70%)

Travel /

For Changemakers travel is integral to their lifestyle, but the drivers for travel have shifted and multiplied. Self discovery, doing good, intellectual challenge, like-minded community and personal growth top the list for Changemakers over luxury indulgence or simple escapism.

When considering destinations, this group are assessing them politically and ethically too. The global nomad isn't disappearing, but in selecting cities to visit or work in - LGBT friendliness, job opportunities, immigration tolerance, and startup viability are key.

With all of these potential destinations and choices, and plethora of flight and hotel aggregators, our time-poor Changemakers would actually appreciate a thoughtful travel agent to take the stress out of travel.

[Oceangate](#) are offering a once-in-a-lifetime voyage to explore the Titanic in 2018 - the first such mission since 2005. Fewer people have seen the wreck than have been into space or climbed Everest. Despite the \$100,000-plus price tag for the eight-day trip, guests are treated as part of the ship's crew working on board - rewards come in the form of a unique experience.

Air France launched its subsidiary [Joon](#), described by Air France CEO Franck Terner as "a new model of airline, between a traditional and low-cost airline, a new travel experience for all customers." Joon offers organic treats on board, in-flight streaming, and USB ports for charging.

[Habitat](#) specializes in global wellness travel, offering retreats and eco-chic hotels to members in Tulum, Malibu and Namibia. They build and activate spaces around the world - hotels in inspiring destinations, clubhouses in hub cities and a membership and events program, acting as social architects to create extraordinary experiences.

Opinium Analysis

The ability to take flight from not only their physical relationships but also their virtual ties is just as important; 62% switch off their social media on holiday. Booking holidays or even deciding on a destination can be stressful, and so unsurprisingly 71% would like a travel agent to help organise trips for them.

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Work & Education /

For Changemakers the traditional workplace of permanent jobs-for-life does not exist and parents not understanding their children's jobs is widespread.

The modern workplace may claim to be one of hyper-agility and diversity, but in 2018 employers big and small will be under intense scrutiny to clean up their act as the era of "glassbox" transparency continues.

Outdated education systems and recruitment techniques are not preparing future workers for the future workplace, except in regions with emerging industries and rapid tech development like India, where Changemakers are learning new skills and creating new roles at lightning pace and fully expect to embody portfolio careers.

With so many options at their disposal, what Changemakers want from work is flexibility yes, but not at the cost of security and personal fulfilment. They are also turning to their places of work to provide networks, facilities and innovative solutions to age-old issues like mothers returning to work.

The idea of co-living is moving from a dystopian vision of community to a viable temporary option for transient global citizens.

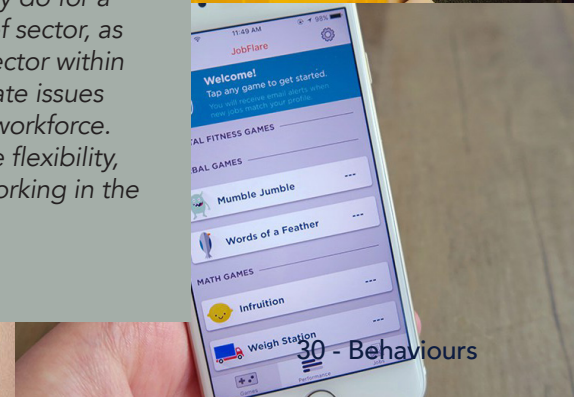
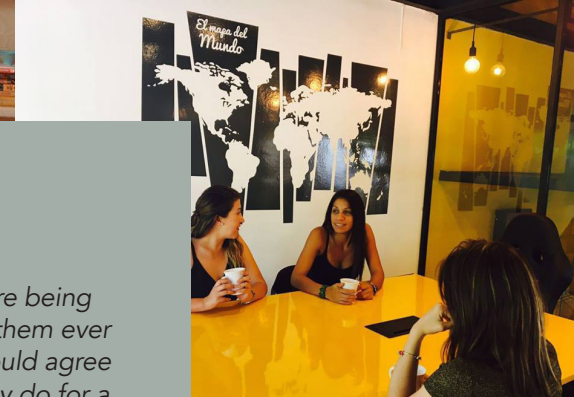
Continuing its exploration of the future of living, car brand [Mini](#) has announced its plans to build a co-living development in Shanghai. The complex, which will include apartments, workspaces and car-sharing services, will be located in a former paint factory in the city's Jing'an district.

[Urban Mujer](#) is a co-working space in Chile, created specifically for women, designed to provide networks and support for women and provide mothers the opportunity to bring their children.

[Jobflare](#) is an iOS app that measures American jobseekers' abilities as they play games—analysing attention to detail, problem-solving and math skills. Users are then sent job posts that suit their profile, top performers are personally contacted by a team of talent scouts.

Opinium Analysis

The idea of traditional job dynamics are being challenged by Changemakers. Moving them ever further away from their parents, 51% would agree their parents don't understand what they do for a living. They are liberal with their choice of sector, as 69% think that they'll change career or sector within the next five years, though this can create issues for employers looking to create a loyal workforce. Furthermore, they are seeking workplace flexibility, with 77% open to the idea of living and working in the same space.



Trend Track /

We constantly re-examine our thinking and stress test our ideas at The Akin - we are our own biggest critics. In these confirmations, we look at how our 2017 trends - Action, Congregation, Fantasy, Humour, Instinct and Presence - have developed, illustrated by key case studies. We also predict how these trends will continue to affect Changemakers' values and attitudes in 2018 and beyond.

Self improvement /// amelioration moving from simply developing new skills to holistic improvement of body and mind, and beyond personal wellbeing to caring for peers, the environment and wider community.

Self image /// human fallibility - revelling in our humanness - this is not trite authenticity but the reality of being human and all its messiness and rough edges.

New and next /// post internet - rapid digitisation has altered everything: the world is reforming, culture will never be the same. The trick is not to produce products, campaigns or content for a world that no longer exists.

Time as luxury /// boredom becomes a welcome status - the cult of busyness is no longer aspirational. Future consumers would much rather be bored and happy than busy and stressed.

Identity Marks /// we will see the end of demographics and even typologies - if niche, weird, and one-off identities are the new drivers of the mainstream, it will become the norm to be radical.

Social Newsrooms /// newsbots - a streamlining of all our feeds into one channel - a bot who understands us and our likes/dislikes and communicates all our information in a personalised way.

Quest for happiness /// the realisation that happiness and actual contentment are two different things and re-assessing what can bring true contentment.



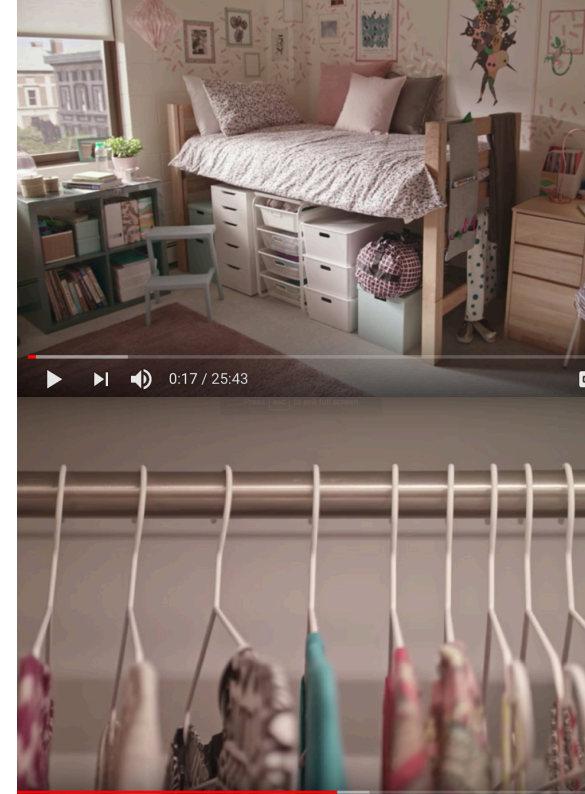


Presence /

From 2017: People are finding inspiration in moments of boredom, and joy in slowness. The constant distraction in contemporary life means there is a growing desire for Changemakers to allow themselves to feel bored. The slow movement has been part of cultural narratives for the last few years and people are finally realising their need to be present and still.

To 2018: Beyond making time in their personal lives for stillness, Changemakers expect brands to facilitate this desire for quiet. From travel and hospitality to art and public spaces, brands are creating experiences and offerings that make it easier to feel present and revel in slowing down.

In our July report we talked about the growing internet phenomenon of ASMR: from whispering to playing with slime. Huge corporations including IKEA, MTV and IBM have all used the gentle noises and voiceovers in recent campaigns.



Opinium Analysis

96% say they like to live in the now and focus on the moment, and when describing themselves to their friends a higher percentage say that they are content rather than busy (69% vs 24%). This has increased from last July, where previously only 52% agreed with the statement.



Instinct /

From 2017: Changemakers are beginning to rely on intuition to cut through the constant online noise. In the melee of peer-to-peer recommendations and the rise and fall of online influencers, many people lost faith in their ability to make the right decisions in life.

To 2018: Going forward, expect more emphasis on re-developing our uniquely human skills, identifying ways and techniques to listen to and trust our bodies and senses more. Brands must experiment with creating experiences that help engage and develop these traits.

Organised by luxury travel company Black Tomato, [Get Lost](#) takes customers to an unknown, uncharted destination in order to evoke the feeling of being genuinely lost. The programme offers a range of environments – polar, jungle, desert, mountain and coastal – and users are fitted out with the relevant kit they'll need to complete their experience. For safety reasons, customers will also be tracked closely by Black Tomato's expedition operations team from a distance.



Opinium Analysis

In July 2017, 83% of Changemakers said they rely on their instincts regularly if not always when making their mind up about things. 18% said they wanted to improve their decision making ability over the next 12 months, this has nearly doubled in the last 6 months to 32%.



Congregation /

From 2017: Changemakers are looking for togetherness, comfort and creativity in new networks. Humans long to belong and seek constant, multiple connections with others. These connections are global and local, analogue and digital, on social media and in real life, and people will increasingly layer them to create diverse and multiple relationships.

To 2018: Brands need to help people re-congregate and find common values across divides. More than this, they need to be actively promoting diversity and inclusivity. Brands must look to support new platforms, ways and moments to connect IRL and virtually.

This is not just a youth quake.
Older Women's Cohousing have created their own community to tackle loneliness in old age. Comprising 26 women aged between 50 and 86, the project encourages a socially fluid lifestyle, where participants share maintenance and gardening tasks, and cook and eat a meal together each week.

Nesterly aims to tackle the housing crisis by connecting students with elderly homeowners. In return for reduced rents, users of the platform agree to offer companionship and carry out chores for their hosts.



Opinium Analysis

Changemakers actively engross themselves within the environment around them. 92% regularly look for new ways to connect with other people. Social media is the most popular way to do this, 69% say social media makes them feel connected, confident (34%) and supported (30%).



Fantasy /

From 2017: Changemakers are looking to lose control and enter new states of consciousness. The need to escape unpleasant realities and the growing ability to experience multiple realities through tech will see mind-altering moments become more mainstream. Beyond the escapism economy, we will see new levels of fantasy, sci-fi and psychedelia creep into leisure activities.

To 2018: Fantastical and surrealist narratives have been adopted by the fashion community at large and the growth in boutique cannabis products and tourism sees new-psychedelics as part of an ongoing wellness movement. Changemakers are expecting brands to seamlessly incorporate multiple realities into their offering as fantasy becomes an integral part of reality.

Written and directed by American actor Natasha Lyonne, [Kenzo's](#) short film *Cabiria*, Charity, Chastity follows Chastity, played by Maya Rudolph, as she journeys through the School of Clowns on a voyage of self-discovery and acceptance. The 13-minute long surreal film features a host of well-known names, including Saturday Night Live's Fred Armisen, Macaulay Culkin and Matt Lucas, who help Chastity to face her future by playing out her Vaudevillian past.



Opinium Analysis

Fantasy and escapism are highly desirable to Changemakers. 86% of Changemakers like to escape life regularly to reset themselves. 44% are looking for new and interesting experiences over the next 12 months.

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Action /

From 2017: Changemakers are ready to act, wanting to be heard and often willing to rebel. Many feel like they are living in a dystopian film plot and this generation's mission is to rectify the mess created by their predecessors. Acting with a sense of righteous rebellion, people are moving beyond Slacktivism to the next level of defiance - actually making change through doing, and finding new allies to help them.

To 2018: Changemakers are placing their faith in brands and expecting them to facilitate real change. Brands need to leverage the expertise inside organisations to deliver services that have traditionally been left to governments. Brands should rethink the role of influence - how can you empower, and represent for a greater good?

German supermarket Edeka surprised customers by removing all foreign products from its Hamburg store. Confronting xenophobia head-on, the campaign makes the point that it is impossible to create the variety that consumers value without including products from other countries. Non-German produce was replaced with signs reading 'Our range now knows borders', and 'This shelf is pretty boring without diversity'.



Opinium Analysis

Four fifths of Changemakers (80%) are actively engaged in political and social causes - this has dramatically grown from July 2017 where only 54% agreed with this statement.



Humour /

From 2017: Changemakers are finding relief in frivolity, and repose in satire. When it feels like the world might implode, politicians are making outrageous statements and reality seems hard to grasp, humour makes life a bit lighter. After years of austerity, it's time for some frivolity and regressing to childhood to feel free and happy, even if just for a few minutes.

To 2018: Changemakers are holding brands to a higher standard of authenticity in communications. They are human and fallible, so brands need the confidence to be real and use humour as a tool to connect on an honest level. Brands need to express themselves in lighthearted and unpredictable ways; embracing visuals that are not always "on brand," humorous and sometimes quite uncomfortable.

Netflix revealed the meaning behind a series of billboards in New York and Los Angeles bearing the phrase '[Netflix is a joke](#)' in a 60-second spot aired during the Primetime Emmy Awards. The billboard campaign was part of the streaming service's wider campaign to promote its stand-up comedy offering. In the ad, comics including Ellen DeGeneres, Chris Rock and Jerry Seinfeld are overlaid onto scenes from a selection of shows from Netflix's Original Series section.



Opinium Analysis

Amongst uncertain times humour is ever-present. 95% of Changemakers try to see the lighter side of life and incorporate humour into their personalities. This has also dramatically risen from last July when only 74% agreed with the statement.

Conclusion /

them is imperative. For a brand to be successful in 2018 they must be in-tune and in-line with this group, as losing favour with them is only too easy, and impossible to regain once it's gone.

Interestingly, when discussing their values Changemakers organically move to discussing brands and see little difference between how they operate and how they expect brands to operate.

The act of building a brand in the Insta-age has blown traditional marketing apart and all brands must be producers of great content and experiences.

Changemakers know they are locked into a symbiotic relationship with brands and are OK with that if brands behave appropriately. They trust brands over government and media (68%) and with such trust comes great responsibility - they expect brands to be bold and surprising. They actively avoid brands that make negative social or environmental impact on society, and look for those that go beyond paying lip service to cultural or political causes to actually take some kind of action.

Authenticity is a term much abused and misused by brands, but the concept behind it - that of having a strong character and acting with integrity - is even more vital in 2018. For Changemakers it is the most important attribute across the board.

Our July 2017 survey told us: 54% want a brand to improve their lifestyle, 43% want a brand to teach them something and 41% want a brand to entertain them. These statements still ring true.

For Changemakers there is a definite ongoing shift towards genuine fulfillment and personal worth. This takes priority over competition and personal gain. Their dreams are not of traditional markers of success or possessions. The driving force is a dream of freedom.

In a charged environment where horror headlines greet us daily, Changemakers are carefully navigating this landscape to celebrate pleasure and consensual relationships whatever their form and call out inappropriate behaviours.

Brands need to push innovation to the top of the agenda - as we have learned, bots and cryptocurrencies are here. Expectations of service and experience are continuing to increase, digital and physical aren't simple binary options. Ethics and sustainability aren't a CSR play for any company, a business's culture and values are public property. Diversity is an expectation not a campaign, different gazes and perspectives need to be used to tell more stories.

You are being watched.

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