



The Akin Changemaker Report 2019

Contents /

04 - 05
Introduction

06 - 15
Attitudes

16 - 27
Behaviours

28 - 37
Trend Tracker

35
Conclusion



T/A

07
Op
Opinium



Introduction /

Our Changemaker report is important to us. It provides a moment to stop, assess, define the shifts and track the creation of movements. Whether these moments are created by a tweet from Kanye, a show, lyric or piece of art, they always stem from change making. This is at the very heart of what we at The Akin do.

In 2019 we are reaching a turning point for technology, politics and the environment. Last year saw many factors converge that highlighted just how overindulgent consumerism had become. The tipping point was reached as many brands began to realise that typical campaigns, focussed solely on profit, were no longer enough. Brands now know they must think systematically and that success will only come from providing value and positive impact that goes wider than before. In an ideal world, the word growth would be banned and targets would be built on betterment and positive societal and environmental impact.

The following report breaks down the attitudes and behaviours of global Changemakers. Defining the most important values and the opportunities that lie ahead.

Context /

Humans have basic needs that do not tend to change over a year, decade, century or millennium. These include safety, trust, security, privacy, shelter, belonging, community, social status, knowledge, connection and more.

Whilst those basic needs won't change, how they are satisfied will, thus developing new attitudes which in turn manifest new behaviours.

The largest shift that has gone from a desire to a need is the questioning of value. As consumers, we are more frequently questioning where the value is, what gives value and what is the value to the environment?

Brands that fail to take this into account may struggle to sell. "BUYcotts" is a new consumption pattern in which consumers are purchasing products as a sign of support and reflection and beliefs of values.

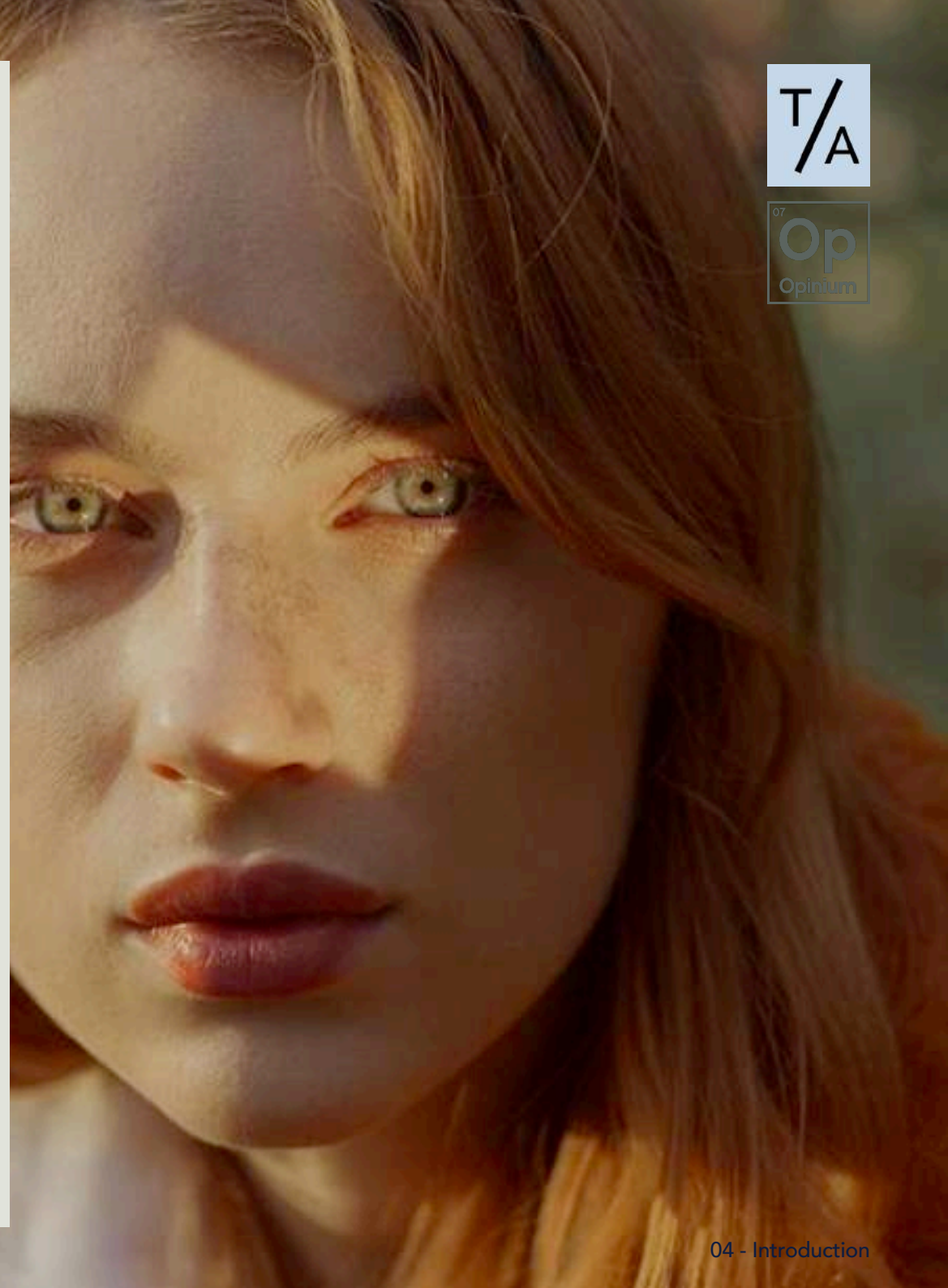
78% would rather buy than boycott a brand to show their support which, while not surprising, illustrates that Changemakers are willing to put their money where their mouths are and support brands with positive messages.

With culture evolving more and more rapidly, we often forget to seek a wider perspective. Many people have nostalgic views of the world but it is important to remember that we live in a post-internet, information, demographics, truth, and consumption world. Many long for a world that couldn't exist in the current day. It's consumers, not technology, that drive the pace of change.

Relationships between brands and consumers are moving away from a top-down, hierarchical system to symbiotic, responsive and respectful dialogue with a focus on cooperative and mutually beneficial development.

78% say their relationship is symbiotic. 85% want brands to be thoughtful and to create products and services that work for them.

One of the most constructive reforms this side of the 2010s is the understanding and requirement for change in our society, ecology and production. Welcome to the age of positive impact.





The 2019 Changemaker /

Who and what are Changemakers*?

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.

They have huge power and influence over industries and markets.

86% likely to switch brands because of their ethical practices. Other reasons include their purpose and their support of a cause (85%), 88% would likely switch brands due to their alignment of values not matching their own (54% are very likely), 69% would likely switch due to their political ties. With this in mind 88% would be likely to switch brand if they aligned with their values.

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.

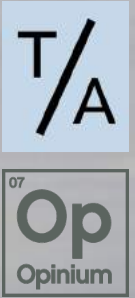
Due to their fickle interests and fast-changing needs, the best way to define this group is by their attitudes and values. These are extremely important to them; their moral compasses are strong and undeterred. Understanding this is crucial to any brand or business wanting to engage with them.

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 affect Changemakers' decision making, thus being able to understand the reasons for shaping their life choices. Interestingly, when discussing these values, Changemakers see little difference between how they operate and how they expect brands to operate.

We explored what Ambi, Circular, Contextual, Grounding and Humanism really means to them; how they think about Ideology, Romance, and Vulnerability, as well as how this will develop in 2019.





Ambi /



Humanist /

Circular /



Ideological /

Contextual /



Romantic /

Grounded /



Vulnerable /

Ambi /

People are seeing the importance of being flexible in their beliefs in order to navigate disputatious times.

Flexibility has been a core skill and needs for consumers for decades. For Changemakers this behaviour is now prevalent, not just their lifestyles but also in their opinions and attitudes. In July we highlighted this group's desire to be Ambi-cultural: to understand cultures other than their own and to build identity through the osmosis of multiple cultures.

Living in an uncertain and undefinable world has mutated Changemakers' attitudes. Many have mixed feelings and contradictory ideas, becoming walking idiosyncrasies and, therefore, living in a state of Ambi. This is, in fact, a positive and progressive thing: by being flexible in their beliefs, flexible and more open to change, this group are blurring the divisions and populating the grey middle area is important for the future.

In August 2018, LA streetwear brand Advisory Board Crystals (Abc) made waves with a surprise collaboration with Wikipedia. They worked together to launch a single T-shirt for \$85, with all proceeds donated to the Wikimedia Foundation in a bid to "keep knowledge free". The T-shirt sold out in a day.



Opinium Analysis

Acceptance of difference is an integral part of the Changemaker's DNA, which is reflected in their openness to all aspects of cultures and societies. Where we see change a year later, is that now Changemakers are beginning to integrate other cultures into their own identity. When asked them what makes their identity, 68% said experiencing cultures different to their own. As these different cultural ideas permeate, flexibility in overcoming any contradictions is needed and Changemakers know this: over nine in ten (92%) say that flexibility is important to them.



Circular /

People are seeking sustainability and stability that they can relate to and invest in.

Solastalgia is “the distress produced by environmental change impacting on people while they are directly connected to their home environment”. Where before it was “too big to do anything about”. Now, sadly, for many it is real.

Companies, people and places are increasingly attempting to put as much into society as they take out by creating ‘net positive’ strategies. Changemakers are committed to making a real impact on the planet’s future, not just with small changes or good looking products and campaigns, but by exploring philosophical and social ideologies such as closed loop systems.

When you think of luxury scents, it’s easy to imagine fragrant fields of flowers or the elegant crushing of petals. Etat Libre D’Orange’s 2018 I Am Trash fragrance was made using an upcycled extract process that distills oils from used organic material. The perfume condemns the waste luxury perfumes creates. Its creation was driven by asking: how can we reuse the exorbitant amount of waste left over from the industry’s process of fabricating perfume?



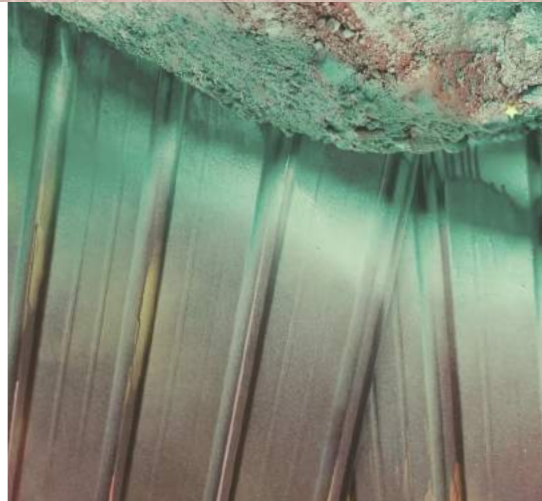
Contextual /

People have a greater need for context during the age of pseudo-news and misinformation.

The world is finally learning how to weather the storm of fake news and prejudiced opinions that flood our feeds with partisan content. Changemakers have especially realised the importance of having multiple viewpoints and gazes on subjects. They are also bored of 'insta filters' and portrayals of perfect lives - Instagram vs reality is a growing movement (check out @celebface on Instagram).

Relevance and the availability of context are becoming key. Review culture is growing and this group demands perspective, as well as a range of personal opinions. A spectrum of narratives and experiences feel more accurate than binary options and gives a better vantage point from which to form a personal opinion. Brands who try to hide information or divert attention to reduce context will be found out in an age of transparency.

Canada Goose Cold Chamber: In September, Canada Goose opened a new store in Short Hills, New Jersey. Here, the brand debuted its Cold Room concept, where shoppers step into a refrigerator-like room to test how the brand's jackets can keep them warm in temperatures as low as -25 Celsius, or -13 Fahrenheit.



Opinium Analysis

Changemakers aren't immune from fake news: amazingly over half (52%) struggle to differentiate between fact and opinion. To help navigate through the daily bombardment of information, context is king, and a lack of context is frustrating for 76% of Changemakers. The bad news for brands is that as far as Changemakers are concerned, they aren't currently pulling their weight, with 66% agreeing most advertising is out of context. This is particularly prominent in India (84%) and the UK (81%).

Grounded /

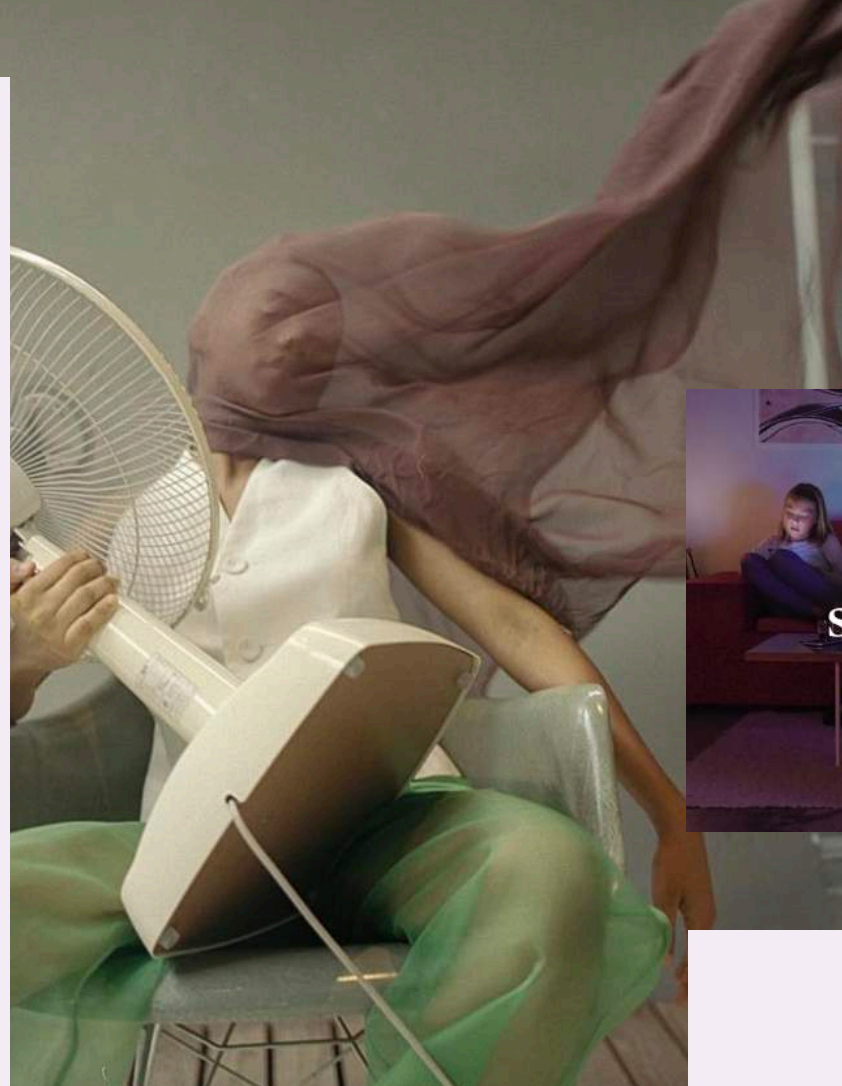
People are striving for presence, bringing themselves back into the moment.

We live in a perpetual thirst trap where our notifications cause a distraction and the blue light keeps our addicted eyes on shiny screens. We struggle to disconnect and focus, although some devices are now trying to help us - Screentime. Changemakers have realised the danger in this, with digital detoxes being commonplace in their weekend or holiday plans.

A recent movement, and one that is a continuation of trying to be more present, is to be grounded.

Trying to be more physically connected to the world around us, as well as one another, can be done through both digital and physical strategies. Changemakers are looking for allies to help them be in the moment and inhabit the now they are in.

While you were wandering in your phone, laptop or tablet all night, the evening slipped past and you didn't notice. The Swedish insurance company, Länsförsäkringar, known for its work with social sustainability and digital health, wants to help people regain life in the real world by creating the Skärmfri Lamp. Designed by Stendahls the Skärmfri limits daily screen time and turns red when 30 users have been online for 30 minutes.



Opinium Analysis

In the UK, adult internet users spend a day a week online and check their mobile phones every 12 minutes on average. For Changemakers, this level of connection to devices and the internet is now seen as unsustainable: 87% of social media users say they would consider quitting. When looking at the reasons why, in order to connect more with people in real life (34%) comes out on top, followed closely by being able to spend time more valuably (31%) and being more present (30%). They no longer want to live their life through a screen but value living in the here and now.*

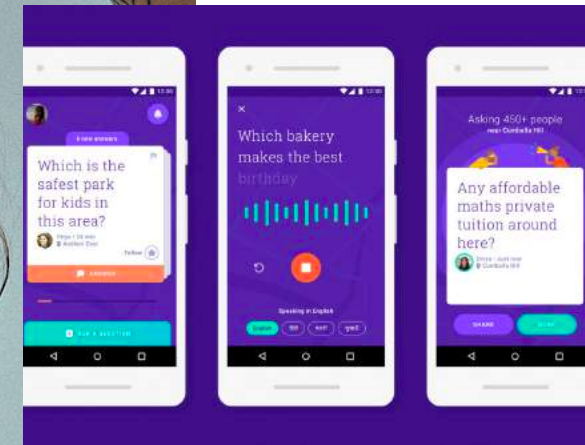
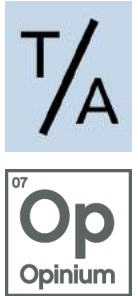
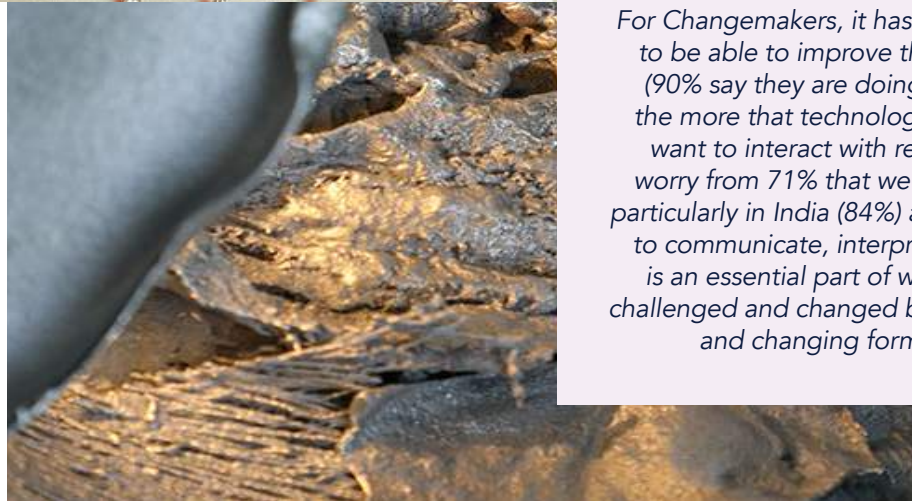
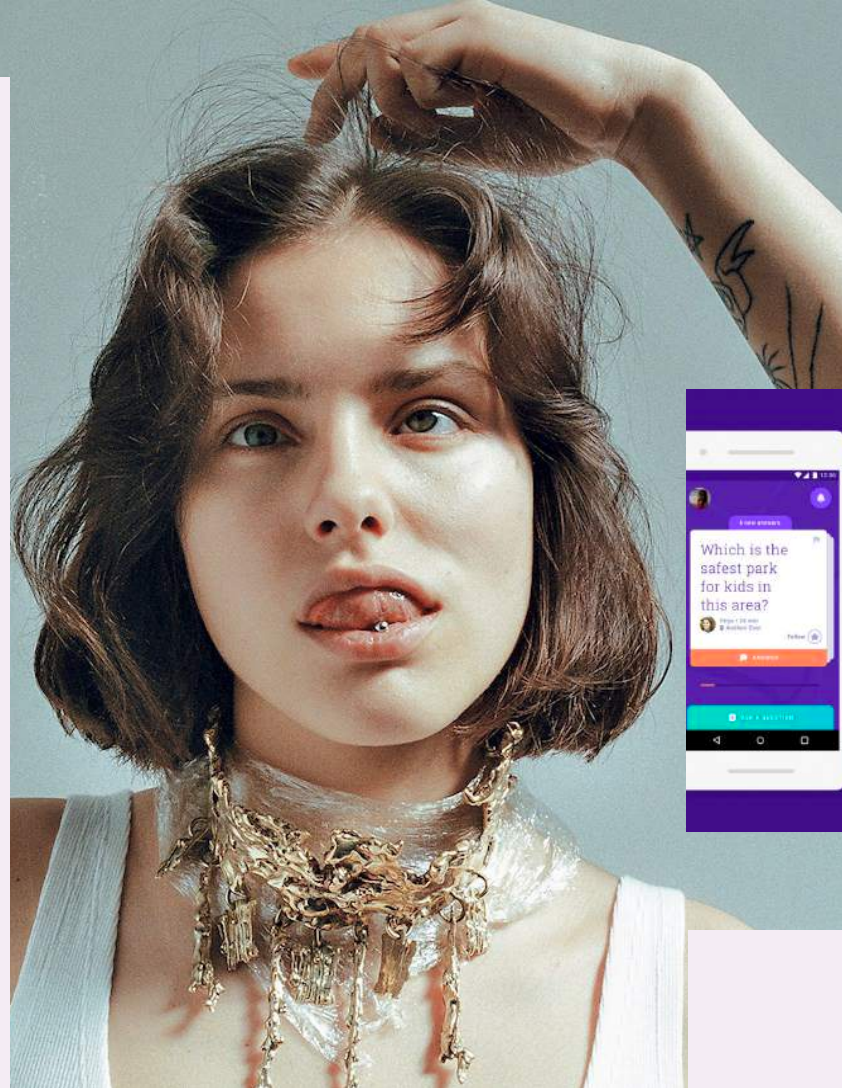
Humanist /

People are realising we have wandered too far from our personage.

There has been a striving for wealth, ownership, social currency and individuality. Our reality has changed beyond what many could have imagined just 40 years ago. We now live in two worlds: the physical and the digital. Society has taken to technology and science to make huge leaps, but those leaps come at a cost.

Changemakers feel that we are losing our humanness. Whether that is our ability to be empathetic, to receive and give acts of kindness or to identify weaknesses. As automation continues to replace skills, jobs and even thoughtfulness, it is more important than ever to find key human skills for the future. There has never been a greater need for human connection and community.

Google's Neighbourly app allows India's quickly urbanising consumers to connect with others nearby. This allows for crowdsourced hyper-local information and the forging of new communities – and roots – close to home.



Opinium Analysis

For Changemakers, it has never been more important to be able to improve their emotional intelligence (90% say they are doing so), and 85% are finding the more that technology improves, the more they want to interact with real people. There is also a worry from 71% that we are losing our humanness, particularly in India (84%) and the UK (81%). The ability to communicate, interpret and connect with others is an essential part of wellbeing, but this is being challenged and changed by the advent of social media and changing forms of communication.

Ideological /

People are realising real luxury is freedom and the privilege of making a change.

Anxiety in the developed world is often caused by the dizziness of freedom. When we have too many options, we stress about making the correct decision or how overwhelming everything can be. This is, ultimately, a true privilege or first world problem, depending on who you hang out with. Your politics, bank, social media accounts and pants brand really do matter, not just for social currency but for the fate of capitalism and our wider society.

Changemakers are at a watershed moment where many are realising their power but also the responsibility their advantages bring. They are using that privilege to invest in values and constructs, not just products or labels. There has been an upsurge of interest in the Japanese concept of 'ikigai' is the latest cultural lifestyle trend. It means 'purpose' or 'reason for being'.

Making Money Make Change is a weekend retreat that taps into young adults' desire to do more with their wealth. During the escape, attendees generate visions of a future in which wealth, land and power are equitably shared, as well as considerate spending and the pursuit of goods and services that illustrate greater awareness of people, the planet and social causes.



Opinium Analysis

How you choose to spend your time and money has always been, and will always be, a series of trade-offs. For the wealthy, this has traditionally been a lot easier, as with more money comes fewer responsibilities. Changemakers, being well off themselves, recognise this, with over half agreeing that luxury (52%) is freedom, and a slightly higher proportion (54%) seeing luxury as privilege. Furthermore, they are beginning to realise that they have the ability to start making the positive impact they want to see in the world: 68% want to use their privilege for good.

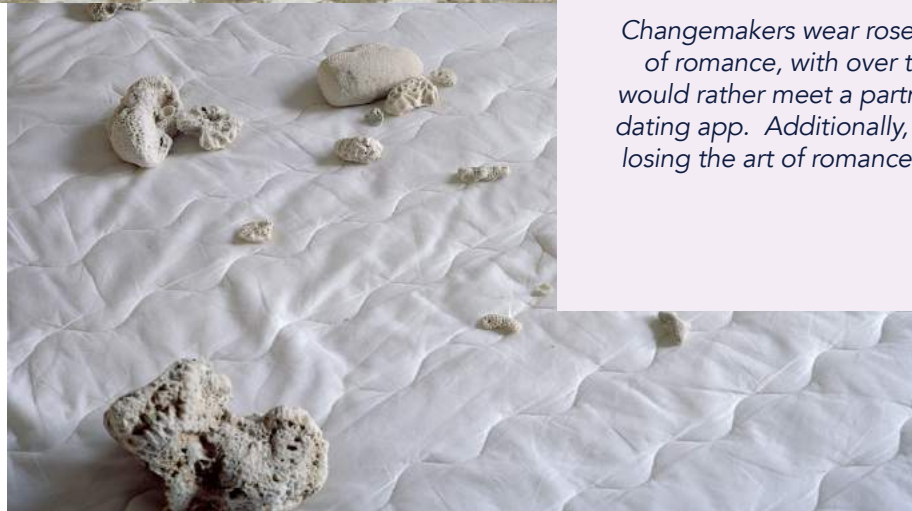
Romantic /

People are nostalgic for romance after a decade of swiping.

In the past two months, The Atlantic, Vice and Refinery29 have all reported the decline of and the nostalgia for romance. While online networks are changing how people meet and flirt, over 25% of the adult world are single by choice. With this new cohort having new aspirations over the 2.4 goals of previous generations, many messages miss the mark.

Whether single, partnered up or polyamorous, romance is still needed. Changemakers realise this doesn't have to mean a love affair in the traditional sense. The online dating space is beginning to change, with platforms such as Instagram overtaking the likes of Tinder because they offer more self-expression and an ability to learn more widely about a potential partner.

Room 301 is a new project from The Kimpton Everly Hotel in Los Angeles. Described as a social experiment, Room 301 explores the human connection with interactive elements that allow guests to share their experiences with previous and future occupants. Guests can leave notes, share personal Spotify playlists and even pay forward rewards points for the hotel. Guests also share more personal information by answering questions like, "What is your favourite thing about yourself and why?" and "When was the last time you cried or laughed intensely?"



Opinium Analysis

Changemakers wear rose-tinted glasses when thinking of romance, with over two thirds (67%) saying they would rather meet a partner in real life rather than on a dating app. Additionally, half (50%) believe that we are losing the art of romance, particularly so in USA (59%).

Vulnerable /

People are getting high off notifications, but desperate for company.

In a time where people feel uncertain about the future, their place in it and how best to navigate it, there is a constant connection to information and to friends, families or strangers if you wish. However, why are people feeling more lonely than ever even with these communication tools?

Changemakers are recognising their vulnerability and utilising a series of coping mechanisms to combat loneliness, whether that be getting a weighted blanket or going to a hug café. They are beginning to see the difference between being physically and digitally connected, or between lonely and alone. Some have predicted that the next decade will be defined by vulnerability and one thing that is already clear is that in this generation, loneliness is one of the biggest negative effects on wellbeing.

Case study: R29 launches 'Lonely Girls Club' for women. The project is looking at how to tackle this issue, from the women making friends in new ways, thanks to technology, to introducing them to the networks and organisations connecting women in real life through book clubs, sports teams, or over food and cocktails.



Opinium Analysis

Vulnerability and loneliness are issues often associated with older people, yet our research shows that even those who are socially connected and travel often are not immune: 41% of Changemakers say they have felt lonely in the last week, rising to 65% of those in India. It is unsurprising therefore that 55% believe loneliness is one of our generation's biggest issues. As people who suffer from loneliness themselves, 70% of Changemakers think brands and society should work harder to help people feel connected and supported.



Behaviours /

In our second section, we explore how these deeply held values and attitudes affect how this powerful group behave across key categories.

We dig into: beauty, care, fashion, finance, food, drink, health, wellness, media, retail, tech, travel and hospitality. This provides illuminating global data and case studies of brands leading the change.

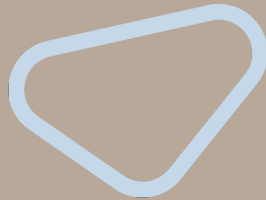
It is crucial to create thoughtful services across these industries that help brands and businesses connect more meaningfully with customers. These connections must go beyond the initial transaction and encourage repeat interactions, as well as build positive impact credentials.



Qualities which attract Changemakers to a brand or product in

Beauty and Care /

Innovation (36%)
Sustainability (34%)
Authentic (32%)



Fashion /

Innovation (40%)
Sustainable (31%)
Crafted (29%)



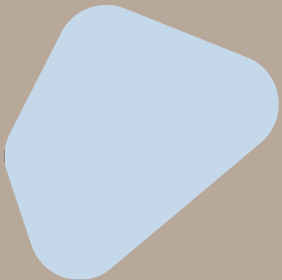
Finance /

Transparent (39%)
Innovative (32%)
Authenticity (30%)



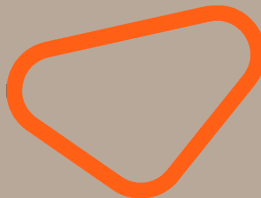
Food /

Sustainable (41%)
Local (29%)
Ethical (25%)



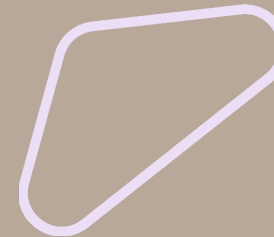
Drink /

Sustainable (34%)
Innovative (32%)
Authentic (28%)



Health & Wellness /

Sustainable (39%)
Authenticity (34%)
Innovative (31%)



Media /

Authenticity (34%)
Transparent (34%)
Innovative (32%)



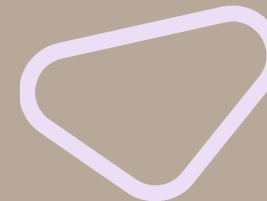
Tech /

Innovative (50%)
Sustainable (31%)
Transparent (21%)



Travel & Hospitality /

Innovative (34%)
Sustainable (28%)
Ethical (27%)



Beauty & Care /



Health & Wellness /

Fashion /



Media /

Finance /



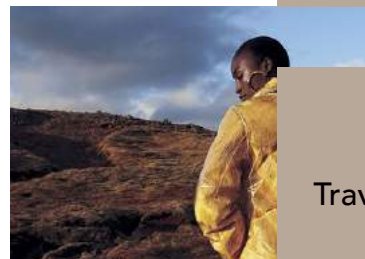
Retail /

Food & Drink /



Tech /

Travel & Hospitality /



Beauty & Care /

We have moved from the quantified self, through quantified stress and onto quantified beauty. After spending decades on expensive products and routines, people are now beginning to question whether this really works and, more specifically, whether it works for them. The average person spends between 45 minutes and 1.5 hours researching products before they buy any beauty items, and even after they buy, 55% of people are still unsatisfied (Proven, 2018). With machine learning seeping into large areas of our lives it is unsurprising that beauty has used the technology to constantly evolve its products.

Case study: Atolla Skin Lab gathers skin data from an individual – such as moisture levels, oil levels and lifestyle factors – and feeds it into their machine learning algorithm to create customised oils. The team continues to monitor a person's skin and tweak the formula as needed. 'A lot of skincare companies stop at the point that they sell the product to someone,' says Maupin. 'They don't measure the efficacy on an individual level to assess whether that product's working for someone.'



Opium Analysis

Changemakers know the importance of maintaining a healthy mind and body with 48% saying they have prioritised more time for self-care over the next 12 months. Valuing themselves as individuals is key, and looking good is part of the process, with 58% saying they invest heavily in their appearance, especially in India (75%). Looking at the products themselves, brands cannot simply rely on advertising promises and word of mouth - many (65%) are looking for solid data to track the effectiveness of the products they use.

Fashion /

As awareness of sustainability continues to grow, fast fashion is out and circular is in. Ninety per cent of clothing is thrown out before the end of its useful life (Reformation 2018). Changemakers are reassessing their attitude and behaviours towards their wardrobes and want to utilise their items for longer, with many willing to pay in to keep them in good condition. ThredUp predict the recommerce market will be worth £31.4bn (€35bn, \$41bn) by 2022. This is driving new aftercare and product preservation strategies, such as specialist sneaker cleaning, bag and shoe repair services and in-store laundries.

Case study: H&M are globally rolling out a new in-store service that repairs any clothing. The new Take Care program has brought post-purchase repair to the fast fashion megastore.

Sewing machines are available so clients can have their fashion pieces repaired. By investing in a program that repairs seemingly dispensable clothing, H&M is not only shifting their appearance but also offering their visitors experience and so a more meaningful positive connection.



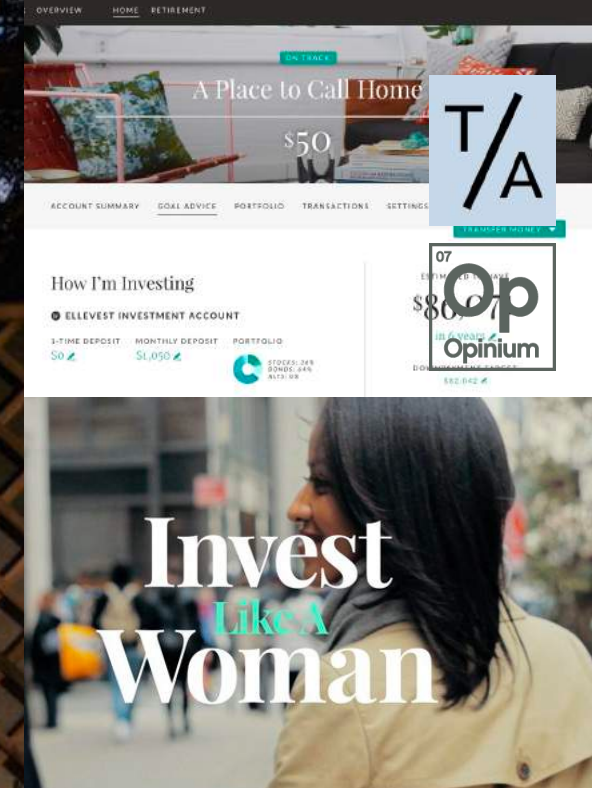
Opinium Analysis

The sustainable and ethical credentials of a brand are hugely important to Changemakers. They no longer want to abide by a fast paced fashion industry, with 48% actively avoiding retailers who promote fast fashion. They believe recycling and upcycling should now become mainstream with 62% thinking fashion brands should have to offer repair services and 51% preferring to repair an item than purchase a new one. With this in mind, 62% believe clothes care labels should include repair information.

Finance /

The world of finance is a daunting place, with many believing banks prefer that people do not fully understand what they do. Due to this, there is a large disconnect and a lack of loyalty to financial institutions - 75% of US millennials would be more excited by a financial solution from Google or Apple (Accenture, 2018). New financial services utilising AI's are putting a person's life into a financial context to provide a personalised and on-demand approach to their financial affairs. This is something that Changemakers are interested in, as well as demanding from their financial gatekeepers.

Case study: Ellevest uses an investment algorithm tailored specifically to women's income projections, investment preferences, age predictions (globally, women live longer than men) and life cycles, including motherhood and career pauses. All personalised portfolios are based on a detailed questionnaire and can be updated in real time without any charges, echoing consumers' unpredictable life.



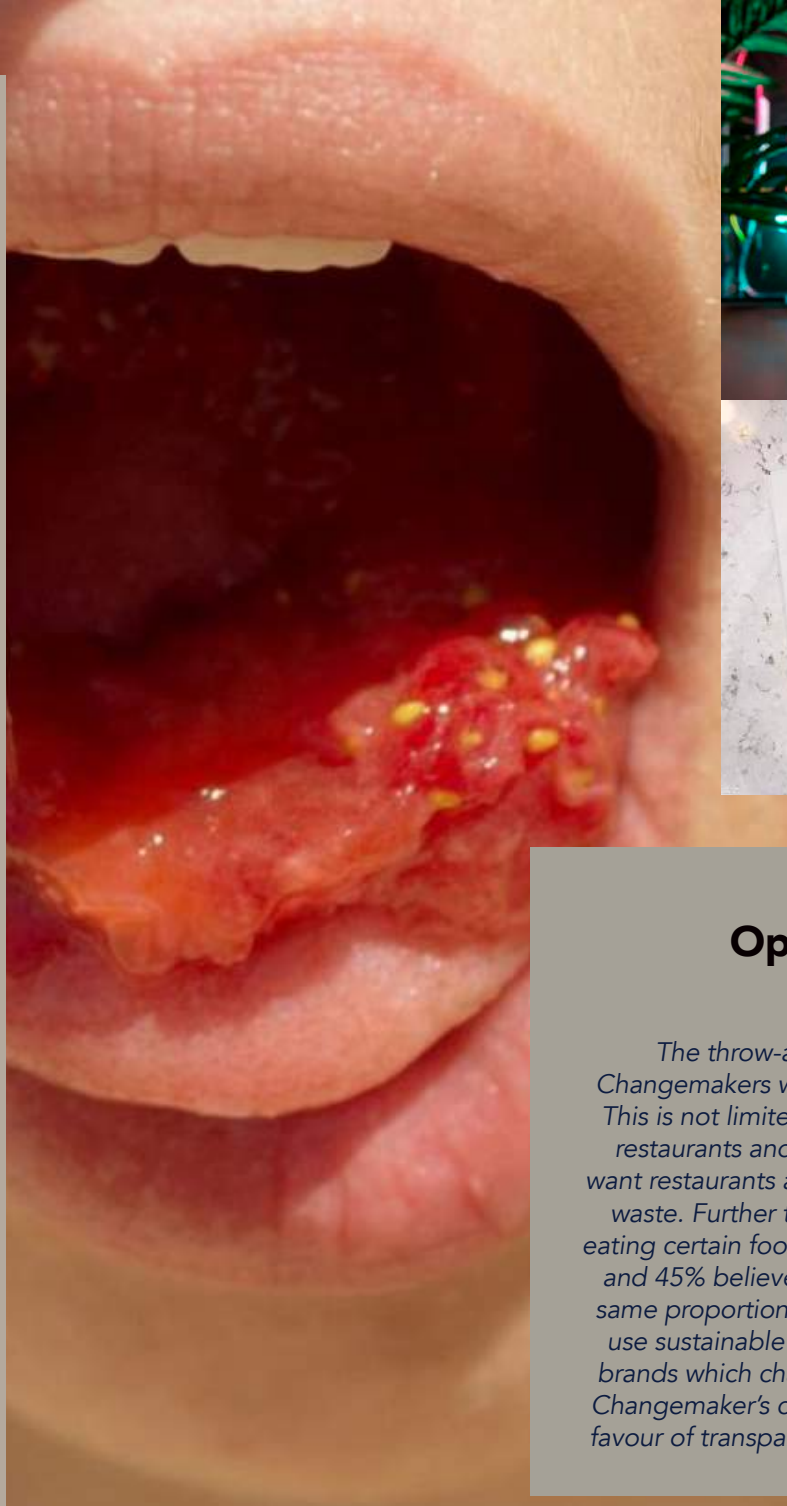
Opinium Analysis

By nature, Changemakers are knowledge seekers and will not blindly enter relationships with financial services providers without understanding the benefits for them. Failures from traditional financial services providers in closing the feedback loop has therefore led them to look for alternatives: 48% indicate they would trust AI to advise them on their finances more than they would a human. This trust extends to investments with a further 46% saying they would trust AI to invest for them over a human.

Food & Drink /

The stability and security of food sources has a huge impact on our diets. The localisation of food has become bastardised with local organic markets selling avocado etc. Changemakers are beginning to question the contexts of this label and its meaning. In the UK, the six-week heatwave meant consumers felt the pinch at the supermarket, where the price of cauliflower went up by 81% and broccoli prices rose by 37% (Big Hospitality 2018). In the near future, we may have to learn to go without certain foods and be more inventive with the produce available in our country or town.

Case study: Patagonia is set to launch Patagonia Provisions in 2019 with new products that include fruit bars, breakfast cereals and whole grain soups. It has also introduced a Long Root Ale beer, made from wheat which fosters micro-organisms and pulls carbon dioxide into the ground. "Of all the activities we humans go about on our planet, producing food has the biggest impact on the environment, but it also has the biggest opportunity for solutions."



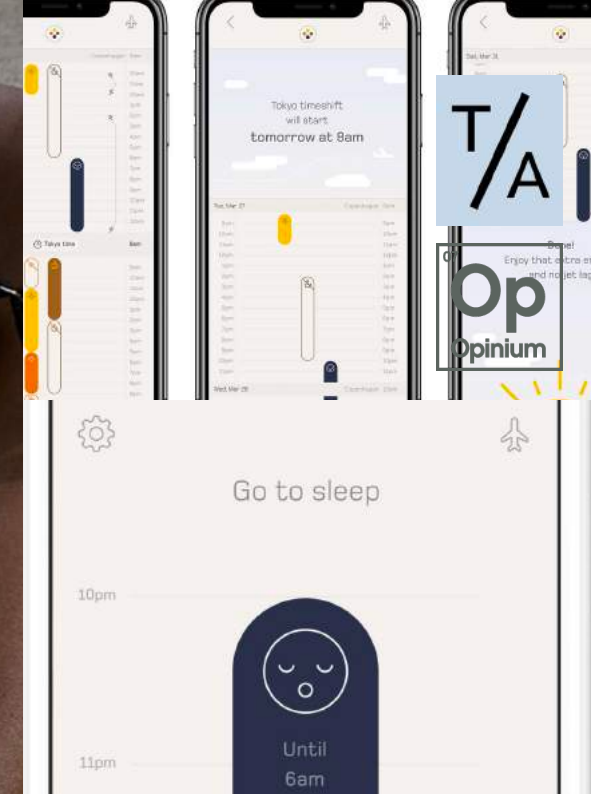
Opinium Analysis

The throw-away society is not favoured by Changemakers with 71% trying to avoid food waste. This is not limited to their own cooking but also the restaurants and brands they interact with, as 60% want restaurants and brands to openly offer their food waste. Further to this, 53% say they have stopped eating certain foods due to their environmental impact and 45% believe veganism is now mainstream. The same proportion (64%) seek out drinks brands which use sustainable ingredients and are open to drinks brands which challenge traditional recipes. In short, Changemaker's consumption patterns are evolving in favour of transparent and responsible food and drink.

Health & Wellness /

There have been many discussions about peak wellness and the dangerous obsession with it. One of the biggest concerns is the disconnection we have with our own realities and the homogenisation of wellness programmes: everyone is and should be different and understand themselves as thus. Growing numbers of Changemakers are striving to get in sync with their body clocks to maximise wellness and productivity on a more personal level. This is being aided by a flurry of new book releases exploring circadian and ultradian rhythms, including *The Circadian Code*.

Case study: Timeshifter is an app providing personalized plans to help people recover from jet lag. The app operates via an algorithm used by NASA astronauts that takes details such as the user's age, sleep habits and flight schedule into account. It offers advice on a sleep schedule, exposure to light, use of caffeine and more.



Opinium Analysis

Changemakers are always trying to maximise their performance and understand what makes them more productive and they feel the answer may lie in their body cycles. Seven-in-ten (69%) want to learn more about their body cycle and 65% agree their body feels different at different times of the month. By looking to understand their body rather than change it, they hope to improve their health and overall wellness. However, they aren't looking to go it completely alone. 65% say they would like products to be made available that address their bodily differences due to the times of the month / year (65% agree).

Media /

The media climate seems in constant flux if it is not the death of print, it is the merging of international titles or the reduction of publishing frequency. Magazine newsstand sales volume stood at \$2 billion in 2017, an almost 60% fall from 2007 (Forbes 2018). Although, conversely, and perhaps linked to the arrival of GDPR and the exhaustion of 'fake news cycles', niche print magazines and paid-for content is on the rise. Changemakers are leaning into taking control of their media choices and choosing to opt in for higher quality.

Case study: Tortoise media's promise to build 'a different kind of journalism' – an antidote to fast and free media – is a bold claim, but co-founder Katie Vanneck-Smith's position is that there has never been a better time to launch. "The trends look favourably on quality paid-for news. The propensity to pay for it is at the highest point in 50 years. There is a wave of consumer acceptance. The technology has finally caught up with the aspirations." To exploit this development, Tortoise is looking to slip into a niche somewhere between the Economist's output and a Ted Talk.



Slow down
Wise up

T/A

Op
Opinium

Tortoise.
Slow down
Wise up

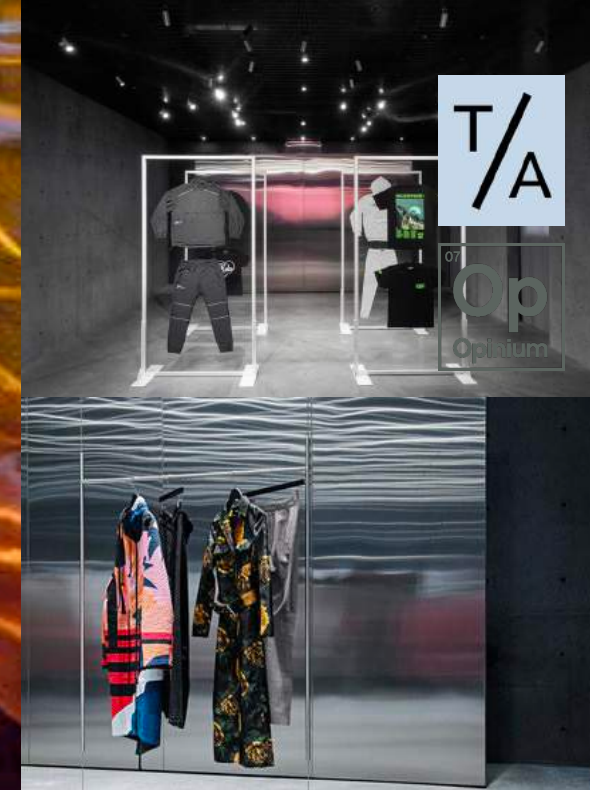
Opinium Analysis

Changemakers are interested in looking outside their own viewpoints and understanding different cultures, and this is mirrored in the news they would like to receive: 70% would like to see a more informed global picture in the news. They are not looking for quick, distorted or biased views but are seeking more in-depth insights. Increasingly, the news cycle is seen to be too fast (54%) and no longer want to be bombarded with new stories which lack empirical findings. Perhaps this is why 63% claim they would pay for media that cuts out the noise.

Retail /

As urbanisation continues to rise and real estate continuing to increase in price, there is more competition for prime space in central areas. *The most expensive global retail locations are Hong Kong followed by NYC and then London and Paris. The the average rent for retail space on New York City's Fifth Avenue is \$2,250 per square foot per year (ICSC 2018).* This means retailers are having to be more thoughtful with their square footage. Changemakers expect experiential retail and, in smaller stores, there can be greater experimentation and flexible merchandising with more tightly-curated edits.

Ssense has opened a store in Montreal based around appointments, not inventory. Customers book 24 hours ahead to request any of the 20,000 items online to try on in-store with a stylist. An automated network then sources the items from the Ssense warehouse, delivers them to the store and assigns them to the right personal styling room at the right time. The idea is to move past outdated department store layouts and leave more space for experiential programming.



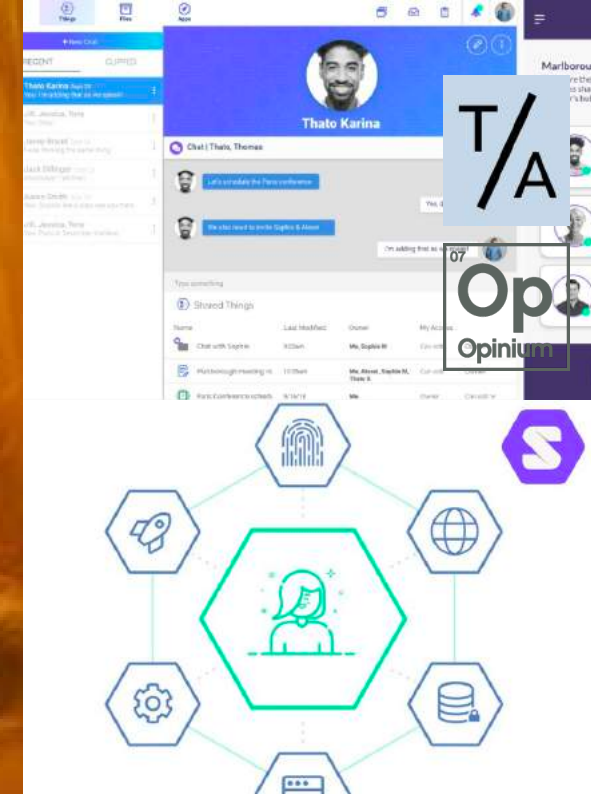
Opinium Analysis

Purchase preparation is now not limited to store browsing but begins before they enter the store, with 65% saying they often pre-browse brands offers before they visit a physical store. Consequently, more thought is now going into every purchase, and the in-store experience should be used to help contextualise goods. For Changemakers, 64% would like to have the ability to test items in the situations they would be used and sometimes the best things come in small packages: 51% prefer curated small retail spaces over large flagships.

Technology /

We might be reaching an era where a single global internet is being replaced with a number of fractured networks. Tim Berners-Lee, the creator of the world wide web, acknowledges that the internet has reached a point where it will start to fork. Google currently owns 93.7% of all internet searches, but this is beginning to shift with over a billion websites existing as a result of the decentralized domain name system (Google 2018). The decentralised web - also known as the DWeb, is a blockchain-based internet model that eliminates the reliance on third-party power brokers – such as Facebook and Google – and returns ownership of data back to users.

Case study: Solid is an open-source web project that transfers ownership of the internet from corporations to communities. Rather than walled gardens, Solid's vision is that the internet becomes 'a collaborative read-write space' for everyone involved. On this platform, ApolloX is a token-based ecosystem for e-tailers, which it will begin testing in April 2019 and with a planned roll-out set for 2020.



Opinium Analysis

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Travel & Hospitality /

Considered travel is on the up and Changemakers are looking for destinations that are sustainable and unique. For digital natives, design, good wifi, as well as a destination that is socially conscious and off the beaten track were must-haves when planning a trip (Holiday Place 2018). Whether on robes, daily newspapers or mini toiletries, hotels rarely skimp the thoughtful small extras. But, with Changemakers conscious of unnecessary waste or pretensions, hoteliers are beginning to take a more considered approach to their offering.

Case study: Hilton announced an investment of \$1m towards driving sustainable tourism in its properties in Africa. As part of the company's Travel with Purpose goals for 2030, this will address the social and environmental impact of its hotels. This investment will centre on five key areas: youth opportunity (training and apprenticeship programmes), water stewardship (aiming to reduce water consumption by 50% by 2030), anti-human trafficking (working with local NGOs), local sourcing of goods and services, and wildlife protection.



Opinium Analysis

Despite tech companies' continuous connection with consumers, 2018 has widely been recognised as a sea change in awareness and concern for how our personal data is used online. This has melded with the existing concerns of online filter-bubbles for Changemakers, of which 52% think the internet has become a monoculture. They want more diversity on the internet, with 46% believing the internet is too censored, particularly in India (72%). Perhaps most interestingly, is that 52% claimed to have used an alternative browser such as Tor or Brave in the last 12 months, which claim to offer greater security and privacy for its users.

Trend Track /

We constantly re-examine our thinking. We stress test our ideas and are our own biggest critics.

In these confirmations, we look at how our 2018 trends
- Empathy, Contradiction, Enlightenment, Obscenity,
Complicity and Patience - have developed, illustrated by
key case studies. We also predict how these trends will
continue to affect Changemakers' values and attitudes in
2019 and beyond.



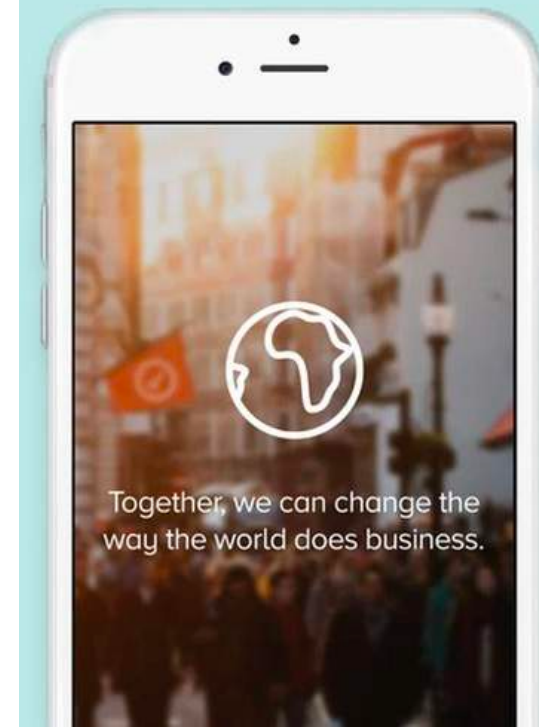


Enlightenment /

From 2018: People have been standing too close to see the bigger picture. One of the results of realising this is to move to a more natural capitalist economy. Here, commerce is based on protecting environmental resources and re-focusing on humanity, not profit. Changemakers expect real progress and are focussing on the future, making changes now that ensure their longevity and future success.

To 2019: People are prioritising the consumption of things that will long term nourish their minds, bodies and lifestyles. Changemakers expect quality materials, sustainable systems and circular thinking. They have a greater perspective than ever before and are searching for additional context and more thoughtful solutions. They are optimistic, engaged with the future and are putting society over themselves.

Case study: DoneGood is a mobile app and browser extension that helps consumers choose ethical and sustainable options when they are shopping online. Essentially the 'Amazon for Good Brands', DoneGood provides a list of ethical, sustainable products, based on its extensive database that analyses everything from B Corp certifications to fair trade practices.





Contradiction /

From 2018: People are full of contradictions and are now accepting that, in some cases, apathy is the only solution. Changemakers are realising stressful lives are not sustainable. In order to navigate the world, and its maelstrom of instability, they need to pick and choose when to lean in to find real lasting contentment. Focusing more on being more human than superhuman.

To 2019: People are actively turning to apathetic moments for self-care. Changemakers don't see this as a character flaw, but a coping strategy and a way to boost mental health, self-esteem and encourage contentment. They are regularly tuning out of the news and social media and, in extreme cases, deleting apps to remove the temptation to engage with them. They are embracing that it is ok to not be ok all of the time and to be vulnerable. This is impacting what they share on their channels, with many becoming bored of the fakeness of filtered and over curated lives.

Case study: There was a time where Kanye West was widely thought of as a musical genius....With coverage of political Kanye hard to avoid, a group of tired Kanye fans in New York set out to give the world a rest with the SnoozYe Chrome extension. Downloading the free extension allows fans and ex-fans a chance to block out all Kanye-related news from entering their personal feeds for a day, a week until Yandhi drops or however long they need. As a feel-good bonus, pins will also be available to purchase, with 100% of the proceeds going to the ACLU.





Empathy /

From 2018: People are demanding technology become more responsible and considerate to humans. Changemakers see technology as an enabler of connections and positive spaces to share and form communities that couldn't function safely outside it. However, there needs to be a push for more emotional protocols and adding this level of intelligence to the technology we use.

To 2019: People are employing a 'nutritious' attitude toward technology, favouring experiences that nourish us rather than addict us or hook us up. Tristan Harris, Google's former design ethicist compares our current relationship with our devices to fast food. As companies innovate, they will need to switch from a mentality that encourages time on screen to one that encourages time well spent. Humanist in their values, Changemakers are also favouring new networks which foster citizenry.

Case Study: Ikea is promoting better sleep habits by partnering with Dr Guy Meadows, the co-founder of The Sleep School. Including training for its workers on the science of sleep, the partnership will enable them to better help customers in store and the campaign will also offer insight direct to consumers through a new online resource named the Ikea Sleep Hub. The advert reimagines sleep as an event to be celebrated. In the video, a group of friends arrive at a club in pyjamas, the dance floor is filled with Ikea beds and the drinks are milk and cereal.

THE A TO ZZZ

For 26 tips on how to sleep better or make your space just right for you, read our A to Zzz guide.



T/A

07
Op
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Complicity /

From 2018: People are realising they have more power acquiescing to the system than attempting to exist on the outside. Changemakers are increasingly accepting their complicity in these larger systems and finding new ways to work within the constraints and to control what they can. Many are happy to be part of these new giant infrastructures as long as they are offered emotional value.

To 2019: People are opting into products from GAFAA (Google, Apple, Facebook, Amazon & Alibaba), and are open and excited about the prospect of even more consolidated services. Changemakers are utilising their flexibility and forging symbiotic relationships with these conglomerates. Whether that is improving service to better fit their lifestyle needs or aligning and engaging in their politics.

Case study: In October 2018 HP and IKEA joined NextWave Plastics, a cross-industry group of companies working in "a collaborative, open-sourced and transparent fashion to create the first global network of ocean-bound plastics supply chains". Founded by Dell and Lonely Whale in 2017 and now includes 10 companies including General Motors and Herman Miller.





Obscenity /

From 2018: People are holding up a mirror to culture and seeing some gross reflections. Avoidance, escapism, switching off, revelling in fantasy or different realities are all ways of putting our heads in the sand. Changemakers are recognising the need to look at what makes them uncomfortable, deliberately disgusting and challenging. Brands and designers are making fun of themselves and the society that led to existing situations.

To 2019: People are accepting some hard truths. Acknowledging forgotten pasts is driving a more progressive sense of world history. Changemakers with their ideologies are seeing that in order to build an inclusive and non-combative future, we need to recognise our iniquitous histories and develop an inclusive past. Whether that is changing Australia Day to Invasion day, or to openly discuss and question the Commonwealth.

Case study: In a backlash against the traditional notions of conventional, pristine beauty, artists and influencers are exploring a darker side by hacking the human form. Dazed Media launched Dazed Beauty in September 2018, aiming to “redefine the language and communication of beauty”.





Patience /

From 2018: People are realising their need to be present and still. Waiting becomes the ultimate luxury as we dedicate more time to things that matter. In an era of cultural richness, boredom is a new challenge and responsibility. We require periods of inner seclusion and calm to finish off something worthwhile. Changemakers need to re-learn patience and move from a culture of instant gratification to one where the waiting itself is part of the pleasure.

To 2019: People finding an equilibrium and a more sustainable pace. Changemakers are searching for tools and experiences that add in waiting, slow down time, and stretch out memories. Grounding themselves and drawing out moments, to purposefully wait. This is a new luxury, and it's all about experience and the romance. In a next day delivery world, the pause that comes from waiting will be seen as a pleasure, rather than a chore.

Case study: LOT2046 is a Los Angeles and Shenzhen-based subscription service that periodically distributes clothing, footwear, self-care products, accessories and media content when it chooses to an without a regular schedule. Promising to change your life, the brand is based on a near future ideology that subscribers literally buy into, creating an anonymous membership community.



Basic plan:
LOT 0046 - bracelet, black, 80% nylon, 13% nylon, 7% spandex,
beamsleeves, sizes S/M, M/L, 1 per 3 months



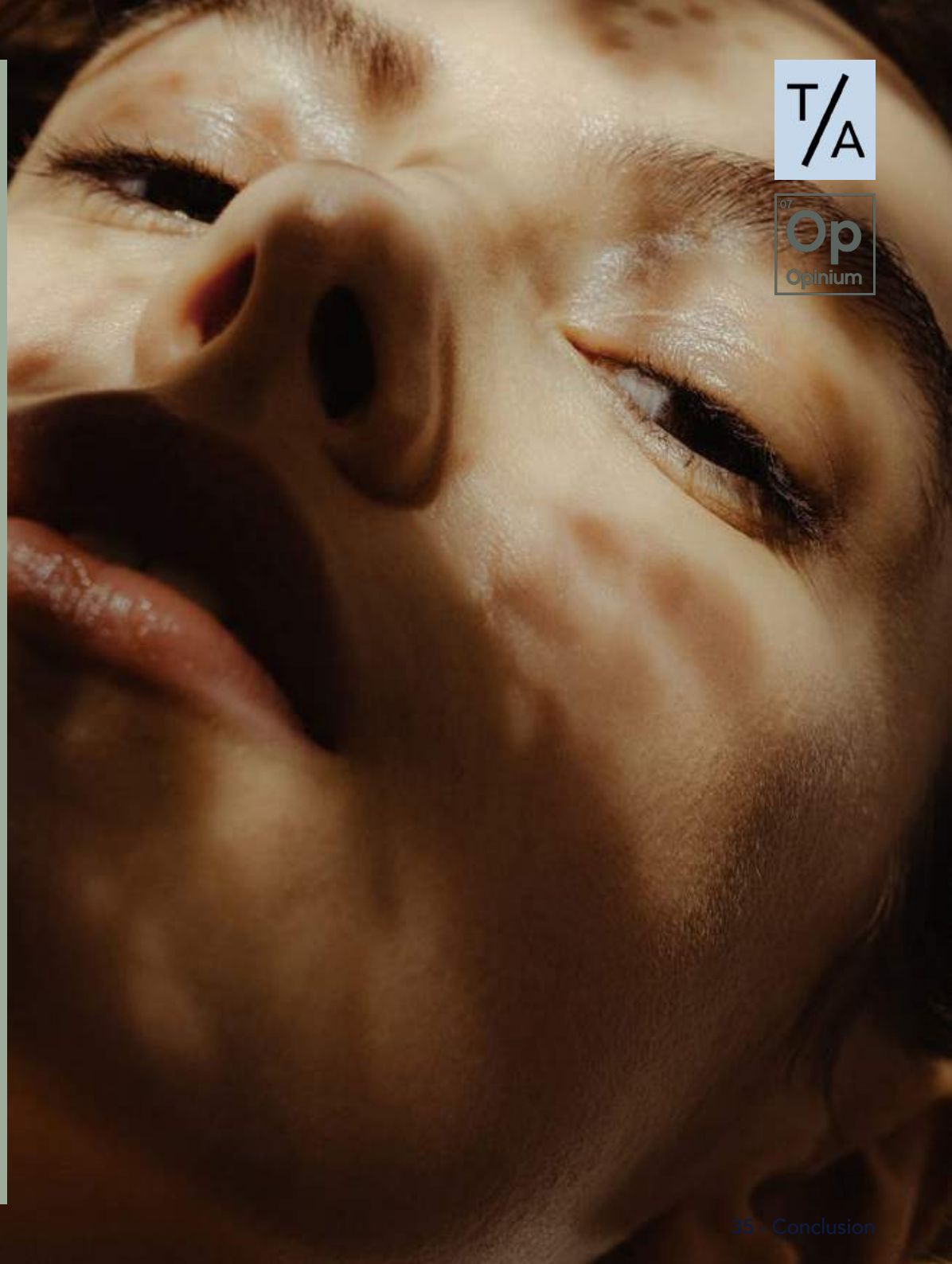
Conclusion /

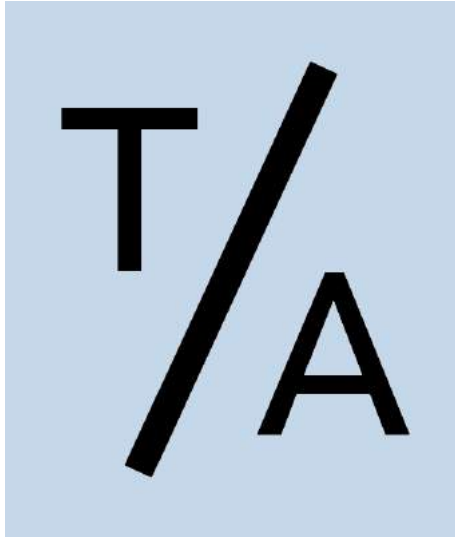
Interestingly, Changemakers consider their relationship with brands to be symbiotic. They have high expectations from them and want creativity, sustainability and long term thinking to be a priority. If they see this they will invest, with 'buycotting' being the preferred method of support.

There is an ongoing move towards contentment and patience. Their ambitions are not traditional markers of success but to use and appreciate their privileges. They want to feel grounded but not weighed down with possessions.

In a charged media landscape, with a stream of notifications, Changemakers are carefully navigating by using apathy. Hoping for romance and acknowledging vulnerability is a strength.

This group are radically searching for their purpose and expect brands to be on the same journeys. Looking for ways to make a positive impact. So what is your plan?





Thank you!

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Methodology /

We have studied Changemakers* across ten global markets, questioning their life goals, values, wants, needs, behaviours and attitudes towards brands and industries in order to provide a clear 360-degree image of them. We also tracked our July 2018 predictions and, in this report, show their developments through case studies.

The collaboration with Opinium Research who used their global network to bolster our predictions validate this report.

Opinium conducted The Akin's survey with 1800 online changemaker interviews (early adopters engaged with culture and politics aged 18-45): 200 in each of the UK, Brazil, Sweden, Germany, Russia, China, Nigeria, US, India and Australia.

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.

www.opinium.co.uk | research@opinium.co.uk

The Akin /

We are a global collection of consultants.

Coming together as a reaction to the outdated and opaque agency model, we bring a fresh and personal approach to consultancy, with a focus on long-term relationships. Our process allows us to provide work that is honest, challenging, agile, original and inspiring.

Think innovation, research, creative and strategy projects. But done differently. We decided to rethink how a team of individual consultants can better work together in order to deliver tangible outputs which brands can action to elevate their practices.

For our larger projects we activate our wide network of talented and trusted consultants, known as our Next of Kin (NOK) to create the best team. The NOK includes gifted up-and-comers through to vastly experienced heavy-hitters that have all worked with us personally.

Their day rate is based on their level of experience and we take no cut.

Our work is honest, transparent and we work directly with our clients forming long-term relationships. When we work on a project it is because we care.

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