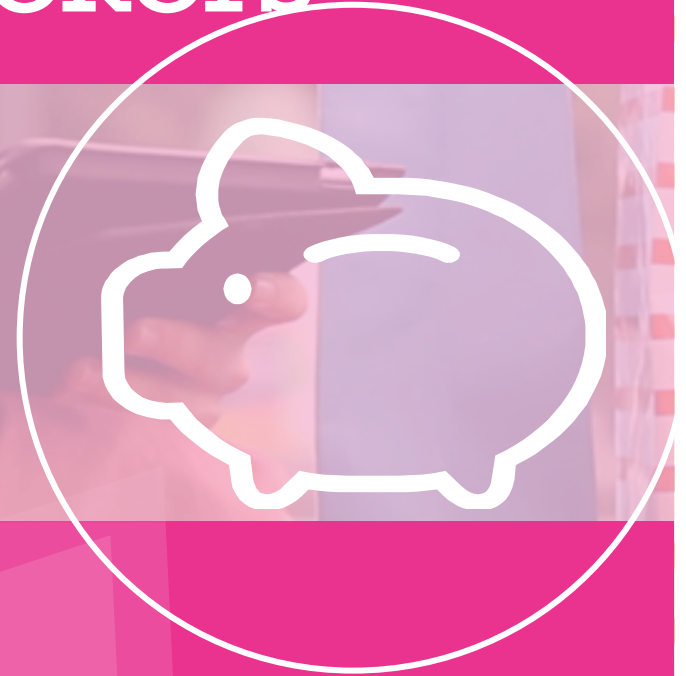




Personal value seekers



“I’m willing to spend money on the things that are valuable to me, and am pursuing more creative ways of getting what I want”

Key takeaways



**PERSONAL NOTION
OF 'HIGH' VS 'LOW'
ENGAGEMENT
CATEGORIES**



**CONSUMER
LIFESTYLES AS
VEHICLES FOR BRAND
BROADCASTING**



**VALUE IS DEFINED BY
CONSUMERS ON
THEIR OWN TERMS**

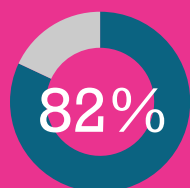
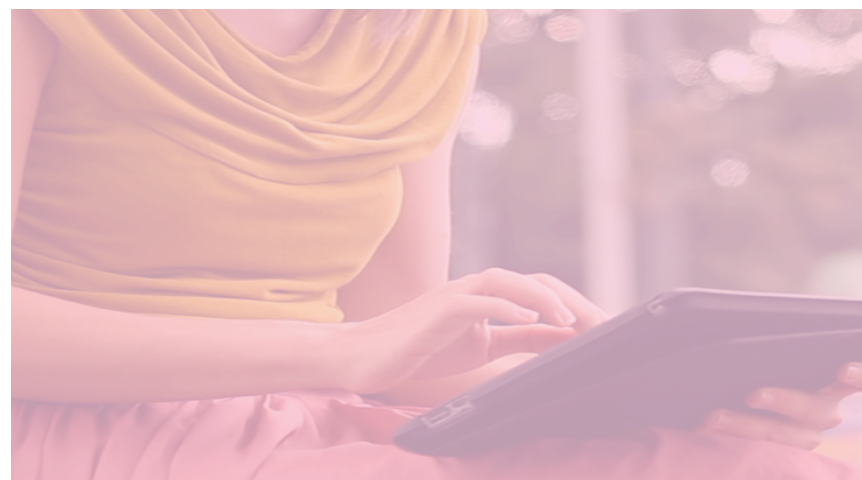


Personal value seekers

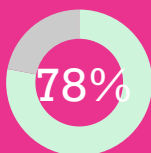


Spend money pursuing personal hobbies and interests in the next twelve months: Likelihood to do in next 12 months

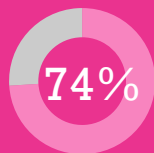
(% very/somewhat likely)



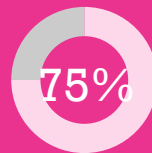
Global Average
+2% since 2013



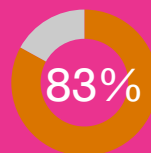
AUSTRALIA



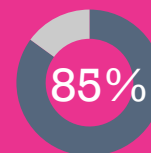
FRANCE



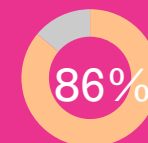
BRAZIL



USA



JAPAN



GB

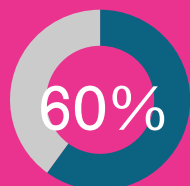
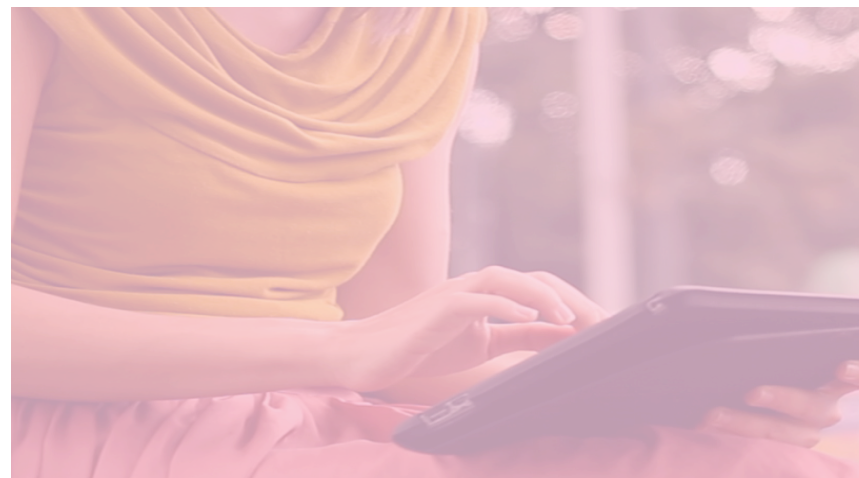


Personal value seekers

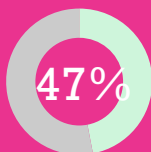


Importance of a brand sharing
and promoting the values I most
care about

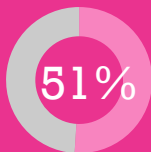
(% essential/important to have)



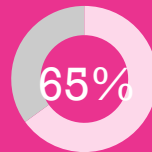
Global Average



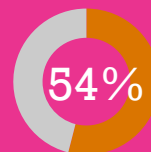
AUSTRALIA



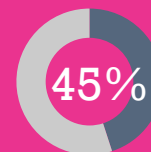
FRANCE



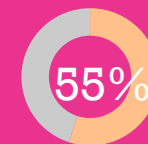
BRAZIL



USA



JAPAN



GB

Overview of sub-trends



The sharing economy

The web enabling information sharing and new models of ownership

Personal values

Willingness to save and spend where it matters to you most

Redefining values

Rising expectations of added functional and emotional benefits

Tailored to me

Products and services that are tailored to the end user are truly unique and ultimately markets of exclusivity



The new experts

Leveraging newly available sources of expertise to get the best products and deals for you



How have the sub-trends evolved?



Value is increasingly defined by consumers on their own terms, with lifestyles becoming the vehicle for personal broadcast; with this in mind we see **one shift in the sub-trends:**

Exclusive Choices



Tailored to me



How dynamic are the sub-trends?



Heating up
Still warm
Cooling



The sharing economy

The web enabling information sharing and new models of ownership

Personal values

Willingness to save and spend where it matters to you most

New experts

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Heating up
Still warm
Cooling



Redefining values

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Products and services that are tailored to the end user are truly unique and ultimately markets of exclusivity





The sharing economy

The web enabling information sharing and new models of ownership



How is this sub-trend evolving?



How it was



Sharing information with your personal network, and collaborating with peers to access the best deals

How it is



Growing interest in sharing not only advice and recommendations, but also the ultimate products and services

How it will be



High-tech capabilities allow the peer-to-peer sharing of basic skills, assets, and resources

New in-market examples from around the world



NEW
2017



House of All creates space for exchanging things, ideas, skills, and expertise



Brazil

NEW
2017



La cuisine de grand-mère, chez vous.

Lou Papé creating a platform for seniors to share their skill, advice, and passion around food and cooking



France

NEW
2017



Yerdle helping brands to develop re-use programmes, providing access over ownership to people



USA



Personal values

Willingness to save and spend
where it matters to you most



How is this sub-trend evolving?



How it was



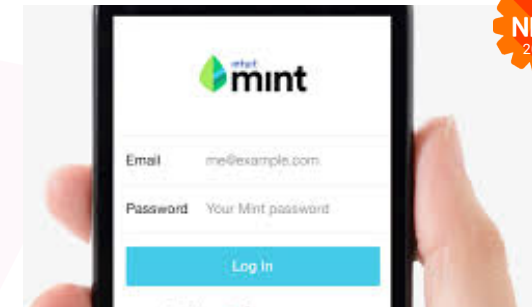
‘Trading up’ and
‘trading down’ within
the same category

How it is



Combining premium
and budget elements
within a single product
or experience

How it will be



People giving more
attention to their mental
wallet, budgeting for
saves as well as splurges

New in-market examples from around the world



NEW
2017

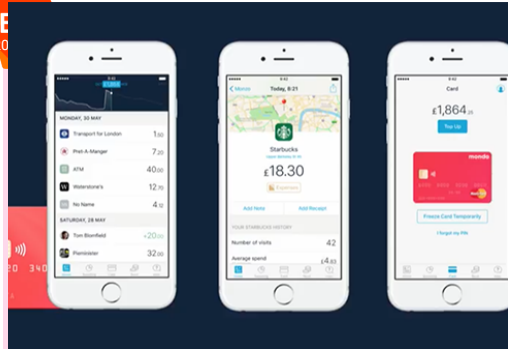


Seijo Ishii catering to the uprising of foodies who want to splurge on niche ingredients



Japan

NEW
2017

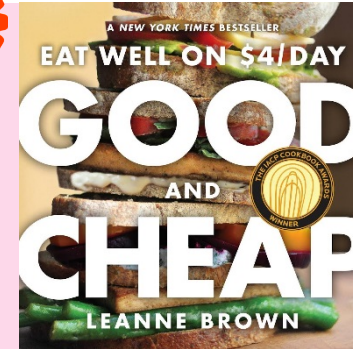


Monzo giving people real-time access to their account so they can see their mental budget



United Kingdom

NEW
2017



Good and Cheap: Eat Well on \$4/Day guiding people to eating well while sticking their food budget



USA



Redefining values

Rising expectations of added
functional and emotional benefits



How is this sub-trend evolving?



How it was



A desire for good value beyond just price e.g. versatility, transparency, control

How it is



Increasingly personal definitions of 'value', including both functional benefits and alignment with consumers' personal values

How it will be



Primarily products need to work for the consumer but after that they must align with values, and do some additional good



New in-market examples from around the world



NEW
2017



5Skippas Beer promoting South African culture and tradition on an international stage



South
Africa

NEW
2017



RockStar Energy Drink aligning with fringe youth culture that values high-intensity living



USA

NEW
2017



Barnana's sustainable business model, aligning with people's passion to reduce food waste



Brazil



NEW
2017

Tailored to me

Products and services that are tailored to the end user are truly unique and ultimately markets of exclusivity

Formerly EXCLUSIVE CHOICES



How is this sub-trend evolving?



How it was



Exclusivity in everyday products, invite only products and content

How it is



Exclusive product and service experiences that consumers can easily share with and impress their friends

How it will be



Products and services that are tailored to the end user are truly unique and ultimately markets of exclusivity

New in-market examples from around the world



NEW
2017



Trunk Club putting people's tastes and characteristics first, curating exclusively picked wardrobes



USA

NEW
2017



Vinome wine delivery based on DNA taste profiling



USA

NEW
2017



Fresh Fitness Food creating nutritionist designed meals with your personal requirements and goals in mind



United
Kingdom



New experts

Leveraging newly available sources
of expertise to get the best products
and deals for you



How is this sub-trend evolving?



How it was



Individual consumers pursuing knowledge and discernment as an increasingly important social marker of accomplishment

How it is



Trusted consumer experts, whose opinions and advice in their specialist area are hugely influential

How it will be



All parties - brands, self-made experts, people - share, collaborate and question to find mutually beneficial solutions

New in-market examples from around the world



NEW
2017



London's anonymous
Clerkenwell Boy finding the
hottest restaurants before
critics



United
Kingdom

NEW
2017



Mama Blogs empowering
women from all walks of life
to share their expert
knowledge and experience



Japan

NEW
2017



GlutenDude connecting a
wider community of peers to
co-create solutions for gluten-
free living



USA

Thought-starters: How could you..?



Next level

Ensure your product meets consumer needs on a functional *and* emotional level? How can you best align with their personalities and values?



Change the story of your category, challenge the definition of your product, and offer something new and relevant?

Thought-starters: How could you..?



Next level

Bring an element of exclusivity or 'shareability' to your product offer? Could partnerships make this possible?



Give consumers the opportunity to customise your products to have a greater sense of ownership?

Thought-starters: How could you..?



Next level

Leverage the power of today's 'new experts' to create excitement around your product?



Create a buzz around your brand to be the place where people actively come to have a voice and participate? What shared values can you dial up?