



keeping
TABS

{ Trends + Anthropology + Behaviour + Strategy }

CANVAS 

Q2 2011

Welcome



CREDITS

Thanks to all the Thought Leaders, expert contributors and inspirational resources who've influenced the analysis of the last six months:

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Welcome to Canvas8's Keeping TABS, a biannual summary of the most important global changes impacting people's attitudes and behaviour. The TABS in this document are based on a combination of expert opinion and extensive in-house research, tailored to an audience of brands, media and ad agencies. Hence the acronym: Trends, Anthropology, Behaviour, Strategy.

We're aware that most of you will be familiar with some of the TABS here. The purpose of this document is not to sketch out crystal ball predictions, but to put the last six months of global cultural shifts into a usable context.

We've trawled academic journals, panned the gold from hundreds of pop culture and industry blogs, and probed the minds of globally recognised Thought Leaders before stepping back and piecing it all together.

So what's different in Issue 2?

We've still tried to make the navigation as intuitive as possible - there are now three sections: emerging TABS at the front, developing TABS in the middle and a summary of static TABS at the back (they've not evolved, but nor are they going anywhere fast).

Each is supported by six global case studies, key statistics and the audience groups most affected – we've described mindsets where possible, but good old-fashioned demographics are often used for clarity's sake. And, because they don't operate in isolation, we've listed any opposing behaviours or shifts. All external sources – along with some excellent further reading – can be found at the back.

I hope you draw as much inspiration from reading this document as we have in putting it together. Prod it, scribble on it and pass it around – and please do let us know what you think:

keepingtabs@canvas8.com

Warmest wishes,

Debbi Evans
Editor, Canvas8

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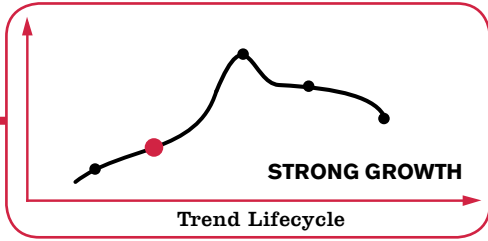
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Section 1 EMERGING



BEING+
CONSCIENCE CONFUSION
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SERENDIPITY
IMPERMANENCE
LIVING THE DREAM
VISUAL DEMOCRACY



Being+

WHAT IS IT?

Being+ is an offshoot of **Hyperawareness of Health** and **Brand Me**, in which the natural human drive for mental, physical and practical self improvement is accelerated by a host of data tracking services.

HOW HAS IT BEEN DEVELOPING?

Daily improvements in biotech hint at what the far future will be like. But for now, it's about careful management and understanding of inherent flaws – such as greed, fear and laziness – and becoming a 'better' person at every level. It's about vigorous self experimentation and testing, 'leveling up' in different areas of your life - whether time management, health, or volunteering. This accelerated pace of learning means that education seldom ends when school does. Whether seeking to map your genetic code or trace ancestry, this is deeply personal data collection. For brands, it's about selling an easily achievable dream, giving consumers the tools to **Being+**.



Who & Where

Connected consumers worldwide, and increasingly in emerging markets. Also particularly relevant for those who believe in evolution.



"Our search history, friend networks and status updates allow us to be analyzed by machines in ways we can't always anticipate or control. It's natural that we would want to reclaim some of this power: to look outward to the cloud, as well as inward toward the psyche, in our quest to figure ourselves out."

Gary Wolf, Contributing Editor, *Wired*



educational resource
Khan Academy has delivered
42,655,875
42,655,876
42,655,877 lessons online

 and counting
 (Source)

WHAT ARE THE SIGNS?

Quantified Self

The first site to gather together the diverse tools for data tracking and self improvement. Its strapline is 'self-knowledge through numbers.'

Fitbit.com

An affordable, sleek gadget which, when worn, automatically tracks your sleeping patterns and fitness in one holistic set of wellness data.

H+ Magazine

Full title *Humanity Plus*, this transhumanist publication tracks current cultural, technological and scientific shifts that will "change human beings in fundamental ways."

Green Goose

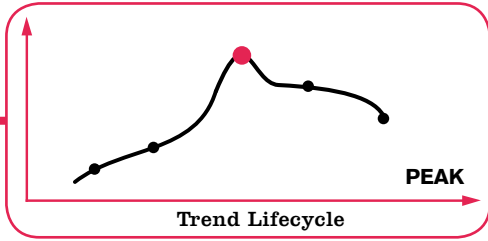
A series of sensors that monitor daily activities and allow the wearer to play life as a role playing game. Players get points for brushing their teeth or completing 5k.

Lifehacker

This hugely popular site revolves around the goal of improved personal productivity in all areas of life.

Gympact

An idea which taps into the theory that people are more motivated by loss than gain – users pay a fee when they don't stick to fitness goals.



Conscience Confusion

WHAT IS IT?

A further backlash against ethical choice overload (see **Attention Economy** in section three), compounded by the upsurge of 'socially conscious' brands. It makes transparent what many had suspected: in spite of voicing concerns around ethical or ecological issues- 'going green to be seen' as part of **Brand Me** - very few mainstream consumers in the developed world actually get involved, either locally or otherwise. Nevertheless, people like to feel as though they're helping.

HOW HAS IT BEEN DEVELOPING?

This is more than political apathy, which in itself is nothing new. It's about wanting to do good but feeling overwhelmed by the number of ethical guidelines and causes to support, and being unable to make a decision. As a result, brands are increasingly expected to take responsibility not just for these causes (**Sustainable Capitalism**) but for their decisions in aligning with these causes. There's an inherent risk that encouraging active brands will make people even more inactive.

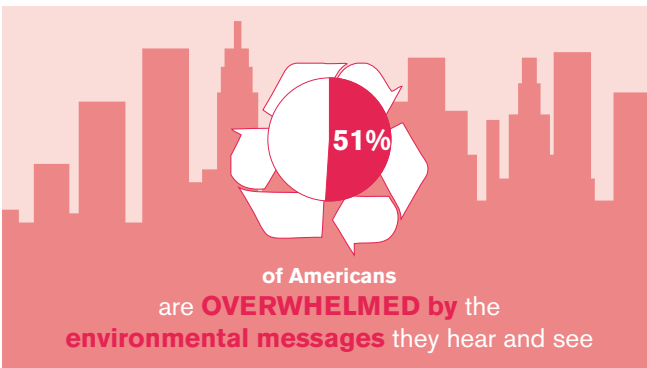
Who & Where

There is an inherent contradiction in youth - filled with idealism but mostly passive (particularly where politics are concerned). This is happening largely in the developed world; emerging markets are key drivers of serious political action online.



"Consumers continue to be confused about environmental claims, often without realizing it. This creates a huge risk for consumer backlash."

Jonathan Yohannan,
SVP of Corporate Responsibility, Cone Marketing



(Source)

WHAT ARE THE SIGNS?



While hated, they tapped into an uncomfortable truth – the masses talk about activism but would rather get a great discount.



A successful New York snack bar that rotates social causes along with its menu to raise awareness of global social and political issues.



Coined by Adbusters editor and activist Micah White, this term generated furious debate about the merit of online participation in eco/ethical.



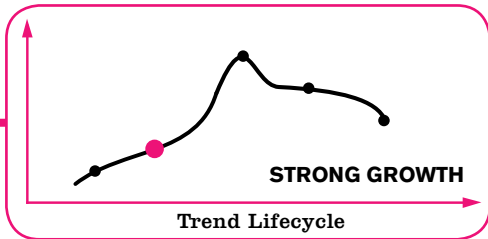
A site which works against what the founders see as endemic pessimism among French consumers.



In a spirited protest against music fundraisers, DJ Terre Thaemlitz criticises the 'wheels of industry' turning behind every charitable sale.



The acronym was coined by journalist Alexis Ong after a series of car bomb tests elicited phone calls from only 4% of Singaporeans.



Byegender

WHAT IS IT?

Byegender is about the blurring and exchange of stereotypical gender imagery and roles in culture and the media, as mindsets prevail over traditional marketing demographics.

HOW HAS IT BEEN DEVELOPING?

Gender-based marketing has taken a long time to drop its clear-cut divisions and preoccupation with pink (or blue) but this is finally starting to change. Socio-economic drivers include increasing female power in the workplace and a rise in stay-at-home dads. On a superficial level, there's been a striking infiltration of androgynous aesthetics. Male youth online experiment with playing as women as part of **Identity Games**. Softer, more emotional strength is favoured over machismo. The boardroom and army are no longer seen as overwhelmingly 'male' domains - and women are happy marching into either: 10,000 more women have signed up for shooting lessons in the US this year, courtesy of Sarah Palin.

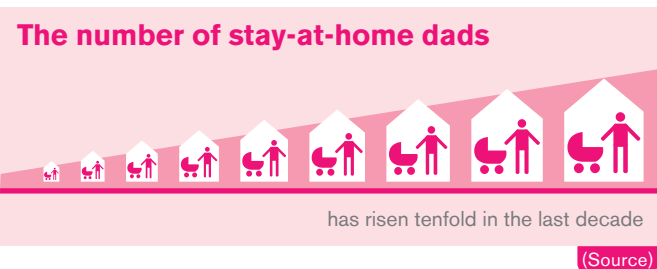
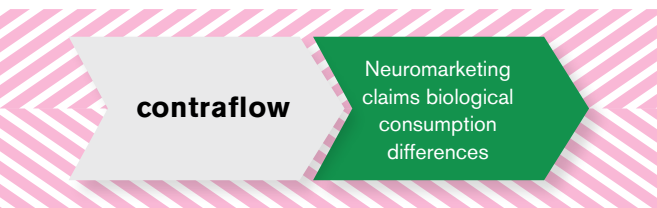
Who & Where

Men and women in developed markets, particularly secular societies. Tends to be more acceptable among younger demographics



“The gender blur is particularly sharp among Gen Y men and women who are more alike than their predecessors. But rather than assume that traditional gender differences are totally passé, marketers ought to tap into this emerging female sensibility to generate human solutions (rather than pink or blue ones!)”

Mary Lou Quinlan, CEO, Just Ask a Woman



WHAT ARE THE SIGNS?



The Kooples

This label is an example of what EuroRSCG call the “new couples paradigm”, in which pairs are marketed to as a unified brand.



Dea Latis

The members of Dea Latis, - leading female members of the beer industry - work closely to encourage beer drinking among women.



Herbivore Men

An established Japanese phenomenon, herbivore men are defined as passive and aberrantly feminine, choosing pampering over pints.



Anthology

This fragrance line by D&G contains five unisex fragrances, all designed to appeal to a certain aspect of the personality (or mindset).



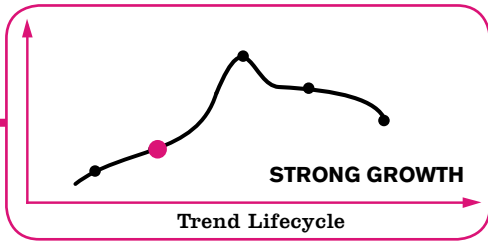
Les Petroleuses

A mainstream crossover publication for “women who are tired of being treated like they only care about high heels and lipstick.”



Pink toenails

A recent J. Crew image on the brand website caused controversy by featuring a boy with painted pink toenails.



Life as an Enterprise

WHAT IS IT?

Closely linked to **Being+**, in which the dynamics of the web encourage individuals to view their entire lives as a project, **Life as an Enterprise** is a reflection of the blurred divisions between work, play and home life. Constantly on the move and connected, with diverse commercial tools at their disposal, people are monetising the minutiae of their everyday existence. For Gen Y, it's about getting paid to do what you love.

HOW HAS IT BEEN DEVELOPING?

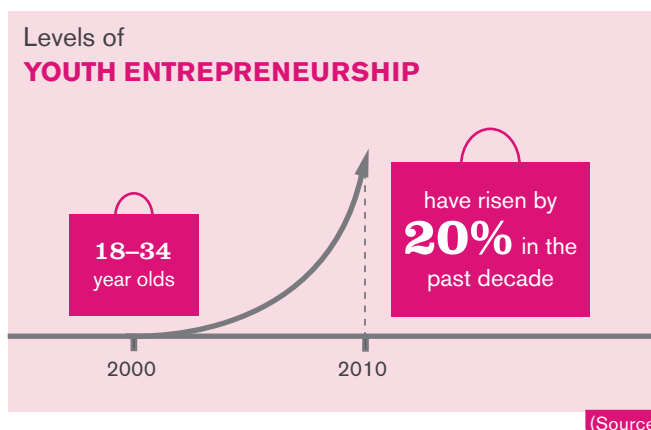
People are increasingly aware of the value of 'idle assets' such as empty parking spaces and unused tools that can be lent to neighbours at a small cost. They are also aware of the value of their data (see **Privacy and Control**) and their influence as a media channel. Being an entrepreneur now carries serious social currency for Gen Y, who see the work they enjoy as a seamless extension of their private lives.

Who & Where

Gen X and Gen Y in developed nations (developing nations do this out of necessity). Those who value interesting careers and independence over money and security.

“The idea of two separate lives, one professional and one consumer, is over.”

Leo Apotheke, CEO, Hewlett Packard



WHAT ARE THE SIGNS?

Atypic Store

A French lifestyle portal which targets 'atypical' individuals – young independent workers who are digital natives and informed consumers.

Human billboards

Individuals like 4head4rent offer up body space as a blank brand canvas, seeding promotional films and images through their networks.

NYNightowls

A community working hub for after-hours projects in NYC.

Parkatmyhouse.com

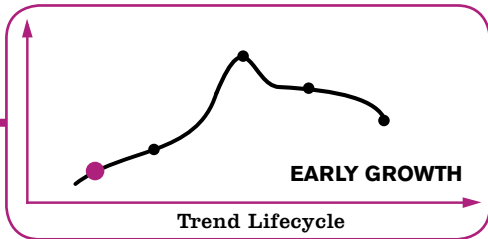
Allows property-owners (residential and commercial) to rent out empty driveways, garages, car parks and other spare pieces of land.

Haul videos

While relatively established, haul videos are a key indicator of teenage girls' status as powerful media channels.

The Adventurous 500

Each day, for 500 days, founder Ryan Parker documents a new Colorado experience, recommended to him by the community.



Identity Games

WHAT IS IT?

A playful backlash against online privacy concerns; **Identity Games** recognises a clear distinction between digital and real world identity and posits that switching between multiple inconsistent personas is an acceptable and, crucially, authentic expression of self.

HOW HAS IT BEEN DEVELOPING?

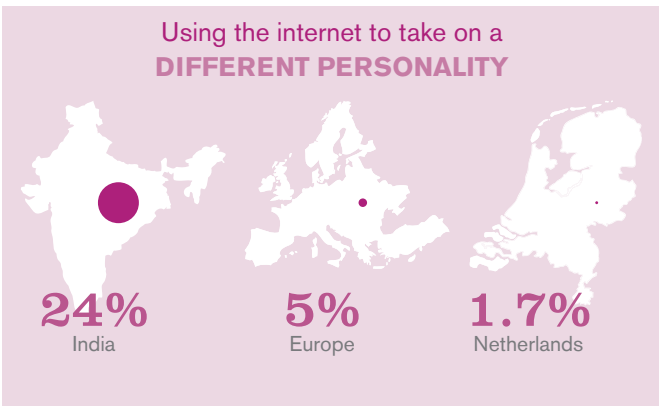
This is about more than having multiple e-mail accounts. Whether you're engaging others directly or simply maintaining an air of mystery because of fears around becoming too transparent, identity games reframe anonymity as the ultimate in status – as social commentator Andrew Keen points out, only the very rich (or very poor) can currently afford it. The rest need to create it. This will become increasingly relevant as governments and companies try to implement SSO (single sign on) technologies and digital identity cards.

Who & Where
Digital natives and power users globally



“If we want intimacy on the internet and we want a private life, the first step we must take is [to think about] how we build our own fiction”

Emma Reel, hacker and journalist



(Source)

WHAT ARE THE SIGNS?



On the internet, no one knows you're a man. The practise of gaming as female characters is increasingly popular among teenage boys.



Weavrs are robots imbued with human personalities that explore the internet, allowing users to “design the personas they want to follow.”



Witch House artists strive to remain hidden from Google's all seeing eye by using HTML symbols instead of letters to make them unsearchable.



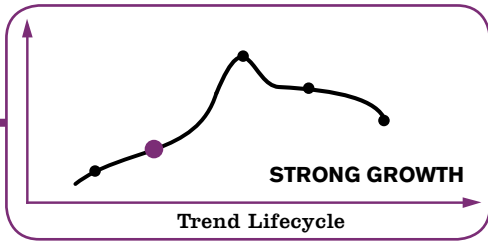
Largely playful, increasingly political, 4chan's army of anonymous live to cause havoc on the internets and beyond.



From Don Draper to Sarah Palin, fake Twitter accounts are testament to an increasing confidence and playfulness with identity.



A Berlin techno geek with six (known) aliases - revealed only to those select few with the dedication and musical knowledge to seek them out.



Public and Private

WHAT IS IT?

Public and private spaces in the real world are blurring as work and life priorities become increasingly interchangeable. Truly private space is dwindling, compounded by networks and notions of the global bedroom. Conversely, public space becomes private as companies seek to provide a sense of intimacy missing elsewhere.

HOW HAS IT BEEN DEVELOPING?

Over half of the world now reside in cities. The premiumisation of available urban space has two major consequences: smaller homes, and busier public spaces. Because living spaces are shrinking, people are looking to reclaim 'public areas' - cue Foursquare-fuelled territory wars. Public places are re-purposed from the anonymous crowds and people are using them to foster more intimate cultural and social connections. This extends to retailers who make their shopping environments more homely. Furthermore businesses like Google or Groupon make their offices 'feel like home'. This blur also means people are making public use of their private spaces as part of **Life as an Enterprise**.

Who & Where

Connected urban consumers
in developed and emerging economies



"If brands go too much into the private sphere - itself a triumph of democracy - people will revolt. So they need more modesty, more elegance and certainly more subtlety."

Dominique Wolton, Director, CNRS

contraflow

Secrecy and
privacy - what's
mine is mine

House Party now has
800,000
mailing list subscribers

The database
grew about
135%

from 2010 2011

(Source)

WHAT ARE THE SIGNS?



An intimate concert in a stranger's living room. In the same vein, Foo Fighters recently announced their 'Rock the Garage' tour.



Increasing numbers of people are signing up to host branded events in their own homes for products from Windows7 to Kraft.



The last bastion of true private space - the bedroom - reduced to a coffin-sized box for weary travellers.



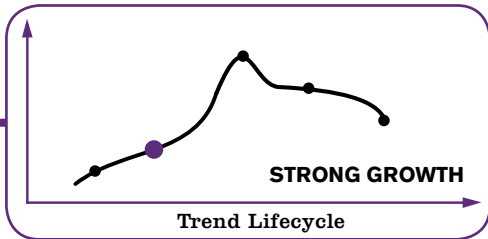
As part of the 'Hacking public space' exhibition in Ghent, artist Lucas Murgida affixed mirrors to city urinals for the benefit of passersby.



Influenced by sustainability and economy, the Tiny Homes movement reflects people's increasing ability to cope in reduced living space.



A games lounge masquerading as a friend's front room: customers can even order in takeaway while button-mashing.



Serendipity



WHAT IS IT?

The internet promised that we'd meet the world. We didn't. Instead we've gravitated (and are increasingly pushed toward) 'people like us'. For the mobile digital generation everything is searched, mapped, known and planned in advance. There is a danger that people never really go beyond their comfort zone physically or mentally. People crave the unexpected.

HOW HAS IT BEEN DEVELOPING?

Online and offline, brands are recognising the importance of creating serendipity and surprise to counteract the siloes. On the web, services are looking to enable 'serendipitous search' through social recommendation and interest graphs. In the physical world, this is being accelerated with counterintuitive mobile applications that encourage users off the beaten path into real-time discovery and interactions with strangers. There is a danger, however - as Adam Greenfield pointed out - that smartphone adoption will lead to increasingly dense networks overlaid on top of cities, originally intended as spaces of contrast and diversity.

Who & Where
Anyone with a smartphone



"Serendipity is not randomness. It is unexpected relevance."

Jeff Jarvis, author, *What would Google Do?*



Google now uses **57** different personalisation filters to customize what we see on the Web even if we aren't logged in

(Source)

WHAT ARE THE SIGNS?



Serendipitor is an iPhone app that "helps you find something by looking for something else".



A 'community building' application that instantly shares images with phones in the vicinity without asking owners' permission.



A mobile social network alerting users to nearby strangers shared interests, encouraging face to face interaction.



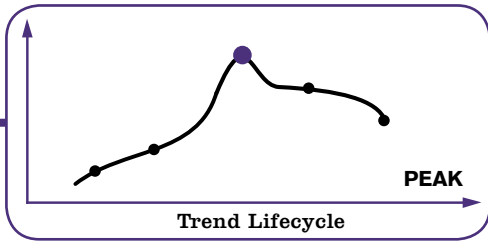
Eat With Me offers new ways to connect with people in your neighbourhood through sharing food and eating together.



The content sharing platform has seen massive growth in 2011, shooting up to 1 billion stumbles every month.



A polite algorithmic middle man, Gatsby introduces people who share similar interests via a mobile app.



Impermanence

WHAT IS IT?

People are renting rather than buying, and streaming rather than downloading. As our lives, neatly packaged into little bundles of data, migrate towards the cloud, we leave fewer concrete markers behind in the physical world.

HOW HAS IT BEEN DEVELOPING?

We first pinpointed this emerging sense of impermanence in late 2009, but if anything it's since increased in relevance and mass market impact. In terms of evolution, it's been mediated by the impact of communities and collaborative consumption – when sharing becomes the default mode, things are never really 'yours' so there's no sense of real ownership. At an organisational level, 'pop-up' and beta's marketing sway still holds and business agility is evangelicised. Even the way people group together is increasingly temporary - as services like Fast Society demonstrate. It's also about being OK with vagueness and uncertainty - unlike **Being+**, which demands that everything is quantified. Conversely, the backlash against digitisation and impermanence also remains strong. JWT predict that people will "fetishize physical objects" in 2011 as **Slow** goes back to basics.

Who & Where

Digital natives and daily web users, globally



"If the 20th century was about [...] individual ownership, the 21st century will become defined by [...] shared access."

Rachel Botsman, *What's Mine is Yours: The Rise of Collaborative Consumption*

contraflow

Being+ / Slow

Spotify has



PAYING SUBSCRIBERS

(Source)

WHAT ARE THE SIGNS?



Club Kanazawa

A Japanese tourism company which locates the value and authenticity of an experience in its transient nature - the concept of *Wabi Sabi*.



Birchbox

A subscription service which delivers a package of high end beauty samples to your door for a monthly fee.



Pop-up apps

A recent Apple patent hints at temporary apps which deliver relevant info in situ and disappear from the phone once no longer needed.



Streetcar

The UK's answer to the Zipcar car rental service has experienced huge success since launching in 2004.



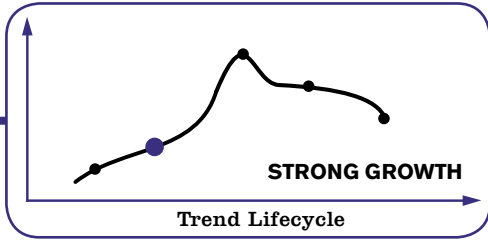
Pop-up magazine

Publishing goes pop-up: a one-night-only event curated in magazine format, complete with interviews, photography and features.



Possibilianism

A philosophy coined by neuroscientist David Eagleman which involves being "open to ideas [there's no] way of testing right now."



Living the Dream

WHAT IS IT?

Consumers are increasingly looking for opportunities to live out their fantasies. They can't be a professional footballer, singer, film star or superhero - they have to be realistic - but they can pretend.

HOW HAS IT BEEN DEVELOPING?

Growing up with gaming as a primary source of entertainment means consumers are used to playing the lead role, not watching it. As gaming becomes more realistic and immersive, the skills required to play are closer to the ones needed in real life (particularly with Rockband or Singstar) and are therefore deserving of greater **Brand Me** kudos. For brands, it's a way of tapping into narcissism and giving people starring roles as a way around the **Attention Economy** - see the hyper-personalised and public Old Spice, AT&T and Orange campaigns.

Alongside this, the allure of (small-time) fame feels ever closer; video is emerging as the primary mode of communication and there are new YouTube stars and seemingly ordinary people 'going viral' every day. After all, **Life is an Enterprise**.

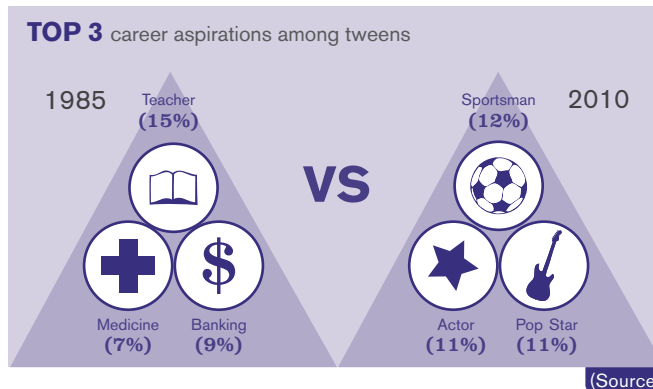
Who & Where

Tweens, teens and Gen Y; older generations yearning for youthfulness



“The big advantage to the ARG genre is that you play as yourself. So when the game is over, you are more likely to see yourself as capable of extraordinary things.”

Jane McGonigal, author, *Reality is Broken*



WHAT ARE THE SIGNS?



Hollywood karaoke. Pick a scene from a classic film and see yourself projected on-screen.



Hip hop magazine XXL launched an app for budding rappers: spit lyrics into the phone and get signed. Maybe.



An event that allows dads to relive their boyhood rock star fantasies by starting a band and performing in front of an audience.



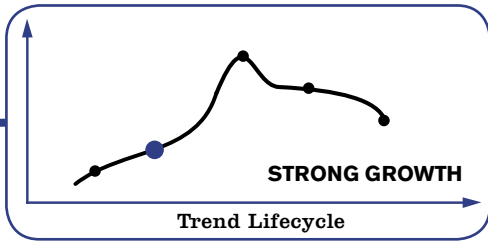
An immersive football-themed ARG which plays out publicly across social media. Be a premier league champ and choose your own adventure.



A video testimonials site that courts word of mouth by making you a celebrity.



The production company responsible for the (in) famous and heavily autotuned Rebecca Black phenomenon.



Visual Democracy

WHAT IS IT?

We are now “people of the screen.” The accelerated shift from a predominantly text-based to video and image-based culture, which is both a byproduct of the web’s open, democratic structures and a result of the attention economy is closely related to **True Stories**. It also indicates a wish to remove any barriers between teller and listener, making communication more visceral and emotional – and therefore more intimate – even as both teller and listener sit at either end of a technological device.

HOW HAS IT BEEN DEVELOPING?

On one level, it’s a return to an ancient form of communication - Egyptians used images to communicate. But this is also around the democratisation of communication; people who don’t know the rules of language are denied knowledge to it, visuals can be understood by anyone. The emphasis on photo stories, infographics, educational videos and video conferencing - sharing experiences not information, according to former Skype CEO Josh Silverman - bridges distances and cultures, evening out inequality in education. The shift is likely to accelerate further with the spread of 4G, and video

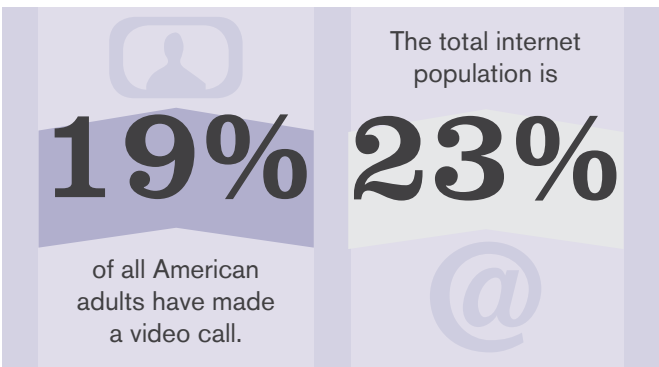
Who & Where

Connected cultures globally



“Historically, those who set up language structures were the same people who set up social structures. The shift to visual culture is a further example of the switch from a top down power structure to a democratic alignment.”

Dr Alex Gordon, Founder, SignSalad



(Source)

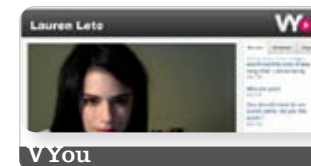
WHAT ARE THE SIGNS?



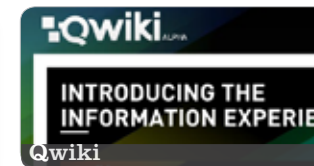
In January 2011 the coffee behemoth dropped all text from its 40-year-old logo in favour of a rounded mermaid icon.



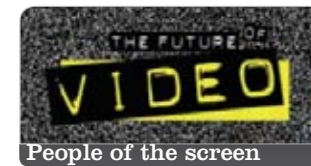
Without billboards and signs, Sao Paolo retailers are forced to invent what Marc Gobe calls a “new sensory language.”



The video-based social network in which users post 30-second question and answer clips for strangers.



A disruptive search tool which displays results in “quintessentially human” storytelling form, using video and audio.



An Institute for the Future think tank which researches the impact of the shift to a visual culture on human behaviour.

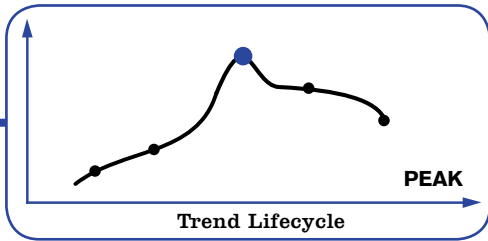


Even the Oxford English Dictionary conceded the cultural relevance of signs by including the heart symbol in its recent batch of additions.

Section 2 DEVELOPING



BRAND ME
CODES OF CONDUCT
COLLABORATIVE LIVING
EAST/WEST
HYPERAWARENESS OF HEALTH
INFORMED CONSUMERISM
NEO-TRIBALISM
PRIVACY AND CONTROL
SUSTAINABLE CAPITALISM
TRUE STORIES



Brand Me

WHAT IS IT?

Whether for commercial or social purposes individuals carefully curate and optimise their personal image across a multitude of channels. In an increasingly participatory society, social currency plays a key role – it's not just about peer reviews of products, it's about peer reviews of peers. People 'like' brands – but they are no longer 'fans'.

HOW HAS IT BEEN DEVELOPING?

As geolocation services continue to grow, the biggest shift has been offline, with the influence of mobile. People are constantly aware of the image they're portraying in interactions with others, and status symbols take a suitably **Blended Reality** approach. Not only can physical checkins be seen online, but Twitter status updates can now be worn on t-shirts. This narcissistic exhibitionism has had negative side-effects: numerous studies have identified a growing sense of inadequacy as people struggle to imitate others' idealised social media portraits. This competitiveness is something brands could leverage.

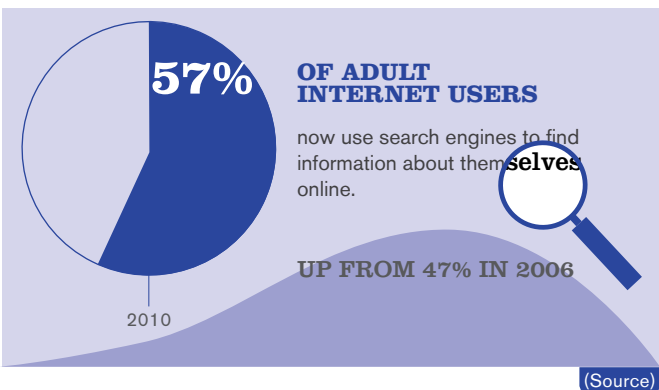
Who & Where

Increasingly those aged 30+, especially those living in cities or working in creative industries. The over 40s are still inclined to think of personal branding as relating to their work life, rather than a blend of the two.



"Whether you like or not, we live in a social hierarchy where your every move is indexed and calculated into a score that represents your stature in a digital society."

Brian Solis, Consultant, Altimeter Group



WHAT ARE THE SIGNS?



The newest personal branding craze in the US is all about creating a slick, professional looking 'face' (even if there's a little substance).



Taps into the narcissism of the trend by providing an affordable, professional airbrushing service for your Facebook pictures.



Another professional branding service for individuals (and small companies) which reflects the deep awareness of the trend in the mainstream.



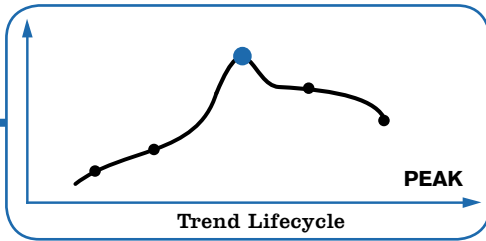
Social currency meets real currency; pay bloggers whose work you like with real money and register on the site to earn money yourself.



OneTrueFan tells web users "you are what you read. Now, get credit for it."



This social betting site encourages punters to play for "money, bragging rights and respect."



Codes of Conduct

WHAT IS IT?

Physical codes of conduct, initially mimicked online, are being modified in the digital space and impacting real-world behaviour, which has become noticeably more playful, collaborative and open. The non-hierarchical structure of the web is changing traditional hierarchies offline.

HOW HAS IT BEEN DEVELOPING?

A new lexicon of online behaviours is emerging. Thoughtcatalog identified five new emotions the internet had created, including IM anxiety and Twitter outrage, which impact our real world selves. Berg CEO Matt Webb points out there is a risk that as we get used to interacting with AI we will start treating our real friends like Facebook friends. Mobile will play an increasing role in all this, turning us into streams of easily readable data and altering initial face to face interactions (the basics such as name and interests are already taken care of, courtesy of our smartphones).

Who & Where

So-called 'digital natives' are the key proponents of lack of hierarchical structure and new forms of netiquette offline.



“Social media has led to a third type of thought: one that you share with a virtual social network instead of those who you may be interacting with in person. When you have and share this type of “third thought,” the big cultural question is whether this is anti-social behaviour, or just a new kind of social interaction.”

Rohit Bhargava, SVP, Global Strategy & Marketing, Ogilvy 360 Digital Influence

contraflow

Identity Games

80%

of internet users are active in some kind of VOLUNTARY GROUP OR ORGANISATION

compared with 56% of non-users

(Source)

WHAT ARE THE SIGNS?



Sleepover Theatre:

Lullaby is a stage show in which the entire audience change into their night clothes and sleep in the theatre.



KLM surprise

When someone checks in to Foursquare at Schiphol Airport, the 'KLM Surprise' team present them with a creative gift.



Diesel Island

This tropical utopia is a perfect example of Codes of Conduct, bringing the web's casual, open attitudes to a real life space.



Less sex in the city

Codes of interaction in social networking circles are impacting the amount of sex had by New York's twentysomethings.



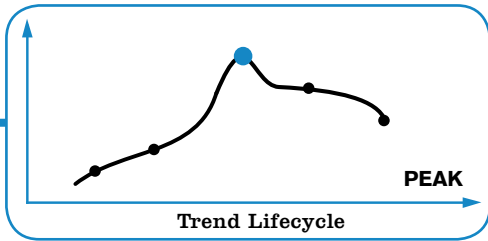
Transito y gentil

A Brazilian campaign by insurer Porto Seguro encouraging kinder commutes and less road rage – all with the use of a simple car sticker.



e-tiquette

A series of contraptions designed to tell little white lies so as to protect the recipient's feelings.



Collaborative Living

WHAT IS IT?

Closely linked to the **Hyperlocalisation** trend, we are seeing bustling fragmented cities spilling out into niche community groups, working closer together and sharing space. It's fuelled by the Gen Y work ethic (awareness of Brand Me, job-hopping), and collaborative working online (crowdsourcing).

HOW HAS IT BEEN DEVELOPING?

There is now a strong recognition that collaboration is the most effective way of getting things done, both on and offline. Shirky's cognitive surplus testified to the power of collective intelligence, groups are banding together for significant political change and games are increasingly being used to reward cooperation over competition. Niche demographics (such as LGBT in the US) are choosing to set up communities away from the city. It doesn't have to be ethical - it's about getting stuff done without traditional organisations and free from bureaucracy. The most significant development, however, is in the rise of the DIY community, where (often remote) groups collaborate to improve infrastructure and access to services.

Who & Where

Busy, urban-dwelling technology lovers and, increasingly, rural communities.



"The nature of community is changing shape: if for our grandparents community was public, compulsory and rooted to one place, today it is increasingly private, voluntary and mobile."

Henry Hemming, author, *Together*

contraflow

Brand Me

In 2010 Kickstarter funded

3,910

projects with a total of

27,638,318

dollars pledged

(Source)

WHAT ARE THE SIGNS?



An internet revolution driven by tiny rural communities in Lakeland is giving the telecoms giants a run for their money.



Village Telco is a community-driven local wireless telephone network in South Africa intended to help 'bridge the digital divide'.



A unique transport solution found in Washington DC in which drivers commuting into the city stop to carpool with complete strangers.



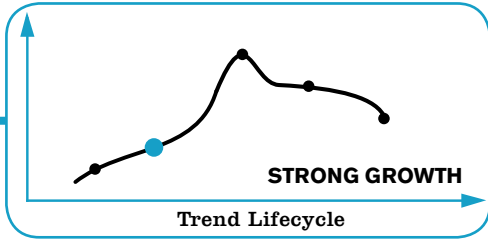
The artists and environmentalists behind Hive Houston aim to discover the next generation of responsible building and living practices.



A community of older French women founded by two friends who didn't want to live on their own after retirement or burden their families.



A bold, gay-friendly community that invites everyone to think differently about aging.



East/West

WHAT IS IT?

The Easternisation of Western culture, and vice versa, caused by shifting dynamics on and offline. The traditionally Eastern focus on community and Western focus on individual are merging, driven largely by social networking and online behaviour.

HOW HAS IT BEEN DEVELOPING?

While aesthetic and pop-cultural influences are still very much at play – see the extensive Asian influence in high-end Western fashion titles in the last few months – the two largely opposed cultures appear to be borrowing values at a deeper social and economic level. The World Bank predicts a massive migration from Asia Pacific to the West in the next few years as a result of extreme weather, so this influence will be sown in at a more localised level. As China’s economic influence spreads, so too will its cultural influence.

The cross-pollination can also be seen in the medical industries; there’s been stronger signs of the East in Western medicine, and vice versa, for a more holistic approach to wellbeing on both sides of the globe.

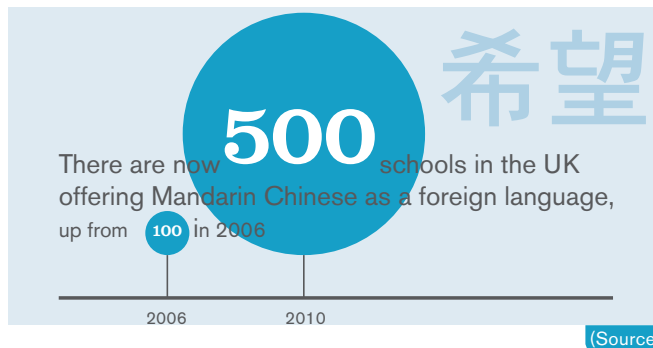
Who & Where

Tweens, Gen Y and Gen X in Asia (Japan, China, South Korea), North America, Europe



“The ease and speed at which digital generations from opposing spheres can dive straight into each other’s cultures has led to a genuine cross-cultural openness and understanding without any barriers or false learning imposed from outside sources.”

Danny Taewoo Kim, Canvas8 Thought Leader



WHAT ARE THE SIGNS?



Inspired by a blend of Zen Buddhism and the cult classic *The Big Lebowski*, it has over 100,000 members in the US alone.



An exhibition by artist Gil Woo Lee in February 2011 which “merges ancient Naturalist Asian philosophy and New York City pop culture.”



The AAIM describes itself as “the medical society for the 21st century”, refusing to subscribe to either allopathic or alternative schools.



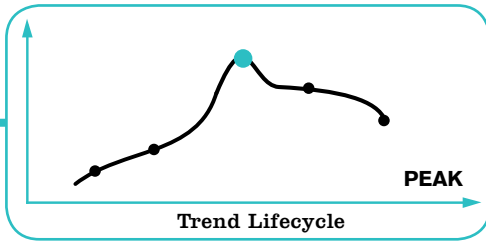
Photographer Steven Meisel shot eight Asian supermodels for the cover of US Vogue in a punk reinterpretation of a classic Cecil Beaton portrait.



Givenchy’s Tisci showcased his Spring 2011 collection with a cast of Asian-only models dressed in Japanese-robot inspired designs.



While there have always been differences in Eastern and Western attitudes to AI, these are slowly being eroded by inventions such as the Kinect.



Hyperawareness of Health

WHAT IS IT?

The popularity of organic food, holistic living and attention to personal mental health has sharpened individual focus on daily wellbeing, fuelled by mobile monitoring apps and access to like-minded communities online. At the most basic level, people want to know what they're consuming and what impact it will have on their health, as an extension of **Informed Consumerism** and **Natural Mindset**.

HOW HAS IT BEEN DEVELOPING?

Increasing consumer confidence, driven by the availability of health data and bolstered by support from health communities, is causing "the gradual erosion of the GP as the first point of contact" in the UK. Health monitoring devices are becoming increasingly wearable and brands award badges for fitness, allowing consumers to wear their wellbeing on their sleeves as a form of status. *Wired's* infographic redesign of US blood test results places further importance on the aesthetics of health information. We've also seen more of a holistic approach to medicine in Western circles, and vice versa, in line with **East/West**.

Who & Where

Boomers, Gen X, Smartphone users in North America, Europe, Asia and increasingly in the developing world



"The target of this information should not be the doctor, it should not be the insurance company, it should be the patient – the person who, in the end, is going to have to start adopting new behaviours."

Thomas Goetz, author, *The Decision Tree*

contraflow

Conscience
Confusion

In 2010
175 million

Americans searched for health information online
up from **117 million** in 2005

(Source)

WHAT ARE THE SIGNS?



This German chemist democratizes health information, displaying rows of leaflets where boxes of medicine should be.



Intel and GE have teamed up to form a joint company for new models that support healthy, independent living for seniors.



Nigeria is piloting several anti-counterfeit measures for pharmaceuticals. Consumers can text or scan a barcode to authenticate a product.



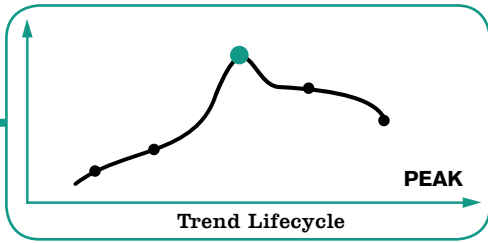
Bangkok Medplex is the world's first health-focused mega mall, three quarters of which consists of holistic and medical treatments.



A medical tourism app which provides information about experience, quality of facility, prices and ease of travel in a simple format.



It may soon be possible to implant tiny LEDs under the skin for a range of biomedical applications, including monitoring and drug delivery.



Informed Consumerism

WHAT IS IT?

People are looking to make increasingly informed (but crucially, not always rational) decisions both prior to and at point of sale. For brands, providing comparative analysis and transparent information creates trust and generates goodwill.

HOW HAS IT BEEN DEVELOPING?

There is evidence that it's not always about making ethical or rational choices anymore; many of the **Informed Consumerism** apps emerging focus solely on improving the experience of physical retail, and focusing on the emotional rather than factual elements of the product - expert taste information rather than calories, for example. Augmented reality apps allow you to look at individual hotel rooms, rather than just hotel availability, or see what the 'best seats in the house' are. This shift taps into the notion that emotional purchases, unlike 'rational' purchases, tend to elicit far less post-consumption guilt or regret.

Interest in product lifecycles and supply chain transparency is also strong, creating an opportunity to brand raw materials (linking closely with **Natural Mindset**).

Who & Where
Globally,
with more progress in developing nations



“Anything that puts people into an analytical [rather than emotional] framework makes them more likely to doubt [a decision]”

Prof. Baba Shiv, Neuroeconomics Professor and Canvas8 Thought Leader



Barcode scanning app **ShopSavvy** has been downloaded by

10 million Android users

(Source)

WHAT ARE THE SIGNS?



Yi Mu Tian

Yi Mu Tian is an organic 'e-farm'. Members select which vegetables they wish to cultivate and monitor their progress via real time video.



Brewer's nose

A barcode scanning app by brewer Cascade provides neutral taste information for almost any beer in Australia.



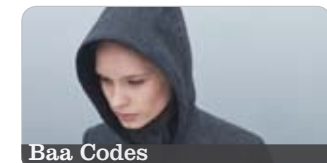
Whole Foods Animal Welfare

Whole Foods have introduced a 5-Step Animal Welfare Rating which tells customers how the meats they are buying have been raised.



AisleFinder

A website that helps shoppers find goods in supermarkets by giving them the aisle numbers of items on their shopping list.



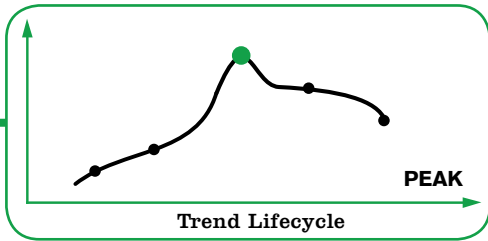
Baa Codes

Icebreaker labels their woollen garments with a special tag - dubbed the Baa-code - that lets you look up the location of the flock.



Room77

Room77 lets travellers have their pick of hotel rooms by browsing detailed plans of size and layout and viewing pictures before booking.



Neo-tribalism

WHAT IS IT?

The cultural equivalent of spread-betting. People no longer identify with a single tribe or subculture, but rather pride themselves on moving fluidly between various disparate groups, cementing their membership to each by demonstrating understanding and appreciation of a common subject.

HOW HAS IT BEEN DEVELOPING?

As like-minded communities online spread across geographical and social borders, **Neo-tribalism** has diversified to reach the most in-depth extremes of identity, from experimenting with gender to collating a 'pick n mix' spirituality influenced by diverse cultural forces and peer groups. Cultural differences and hierarchies are eroding as connected youth share identity inspiration in the same vast online pool, and niche stays normal. Services are springing up which allow temporary group coordination based on the members' context and location.

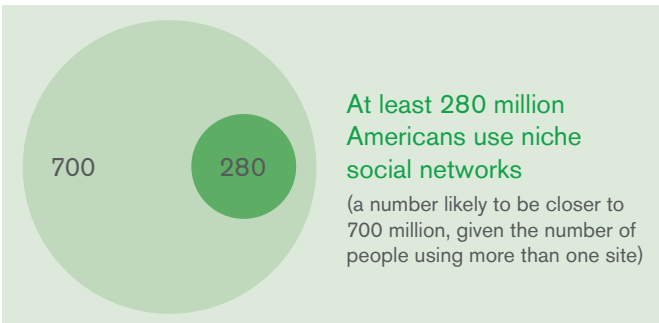
Who & Where

Tweens, teens and twentysomethings in developed markets



"Today's consumers are not one-dimensional. They live across the cultural spectrum and that's where adidas has its edge. The adidas brand extends beyond sports and 'all adidas' celebrates this breadth of passion from athletes, musicians, artists and beyond."

Patrik Nilsson, President, adidas



(Source)

WHAT ARE THE SIGNS?



A group texting service that recognises the fluid shifting nature of tribes. It creates instant, short-term groups for SMS and conference calling.



An international organisation dedicated to researching and recreating the arts and skills of pre-17th-century Europe.



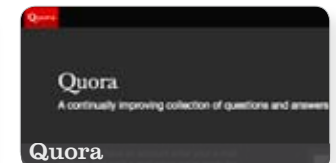
The uniform of a generation appeals because of its 'blank slate' versatility – teens can transform their identities with accessories alone.



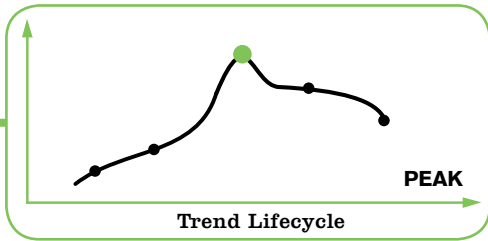
Formerly Gravity, this site allows users to jump between subject areas, debating their interests with a plethora of audiences and demographics.



A workshop in Germany which involves killing and cooking a pig. The act of slaughter is the ultimate proof of dedication and knowledge.



This Q&A site makes clear that Neo-tribalism threatens the loss of 'insider' status. Quora's expert platform helps restore this status.



Privacy and Control

WHAT IS IT?

A heightened awareness of the importance of controlling private data, and companies' access to that data: a refusal to accept 'public by default' settings. Stricter management of **Brand Me** and a rise in invite-only social networks. At the same time, experimenting with inviting brands into private spaces under tightly monitored parameters as part of **Public and Private**.

HOW HAS IT BEEN DEVELOPING?

The issue at the centre of the privacy debate is the proliferation of customer data, which is gradually being recognised for its value to advertisers and monitored far more carefully by all parties. Consumers are becoming highly selective about how and what they give up, and for what benefits. For example, giving up privacy and control for medical monitoring via new technology, in the form of intelligent homes and social networking. In January 2011, the World Economic Forum called data the "new asset class" and it's also been referred to as "the new oil."

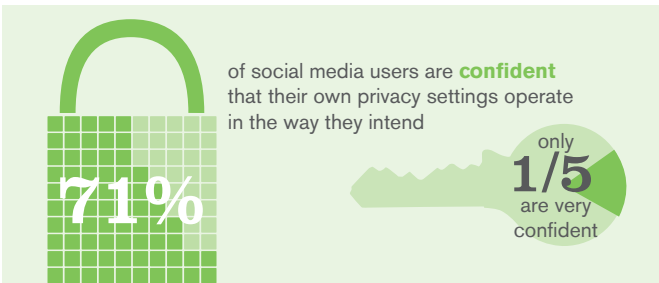
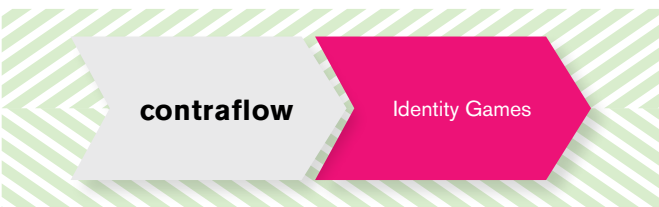
Who & Where

Web users in developed markets; although awareness is higher among power users and younger generations



"It's a matter of building up trust. If you come to me and I don't know you from Adam and you want me to tell you everything, I won't. But if you tell me that with this information you could do something useful for me, I'd think about it."

Amitava Chattopadhyay,
Professor of Marketing, INSEAD



(Source)

WHAT ARE THE SIGNS?



i-allow cuts out the middle man and lets web users sell their data direct to a selected group of companies.



Tru.ly verifies online ID data against US government records, dissolving the boundaries between digital and physical identity.



An open-source project in which users collect and control all their data from a digital 'locker', and share it securely with peers.



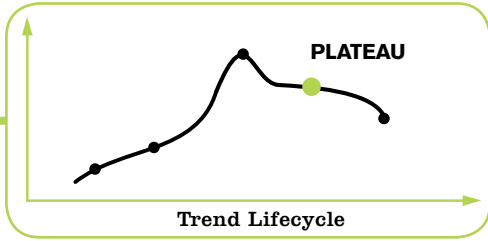
Like i-allow, Personal - 'Where you set the rules for your data, not companies' - allows individuals to profit from their personal information.



Artist Elahi found that after sharing his entire life online in the form of vast amounts of data, he actually led quite a private life.



A browser plugin that scans ad networks for interests and restores control by allowing you to delete interests or make them more relevant.



Sustainable Capitalism

WHAT IS IT?

The creation of a business model that understands and respects the triple bottom line of people, planet and profit. It is about responsibility and longevity.

Sustainable Capitalism's watershed moment came in 2006 with Al Gore's Oscar-winning *An Inconvenient Truth* and has accelerated through the recent economic recession and people's increasing desire to do something inherently good and 'right'.

HOW HAS IT BEEN DEVELOPING?

People's tastes are getting more sophisticated, and they will no longer compromise quality for green when it comes to product selection. On the plus side, people no longer expect brands to be flawless leaders - particularly given the increase in peer-influenced apps which mean that people increasingly look to each other for behavioural cues. As long as brands are transparent about their efforts (and feelings, as part of **True Stories**) consumers will tolerate the less-than-perfect.

Who & Where

Affluent nations; all consumer groups. According to Maslow's hierarchy of needs, self-actualisation happens later on in life - but Gen X and Y are just as motivated by Brand Me



"If designers and policy makers can find a way to link more sustainable behaviours with a higher quality of life, then we have the problem cracked. If we can provide a context in which we can link personal satisfaction and self-actualisation with a more sustainable lifestyle, then we can create a society in which wealth means not having more, but living better."

Mark Vanderbeeken,
Founding partner, Experientia

WHAT ARE THE SIGNS?



Shebeen

Shebeen is a not for profit bar in Melbourne which donates a percentage of beers sold to their native countries.



Levi's WaterLess

The average pair of jeans uses 42 litres of water in the finishing process. Levi's award-winning jeans slash this by 28%.



New Sun Chips packaging

The first packaging redesign was famously loud. Too loud, it seems; it's now been redesigned with all the eco benefits but none of the noise.



Hermes Petit H

The first sustainability label from a luxury brand - an eclectic series of items made from factory cast-offs - makes eco unique and sought-after.



75% said it is OK if a company is not environmentally perfect as long as it is **HONEST** about its efforts

(Source)



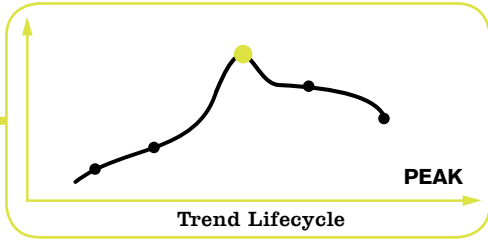
Supervalu bags

Supervalu used to pack three to five items per bag. By increasing this by 5% they've saved an estimated \$4-6 million annually.



Casa Dell'Acqua

A fountain in Paris dispensing still or sparkling mineral water for discerning French tastes. It saves an estimated 2,300 plastic bottles a day.



True Stories

WHAT IS IT?

The consumer search for brands that demonstrate authentic, transparent behaviour with personality, and communicate this honestly - warts and all - across all platforms and brand touchpoints. An engaging story which communicates a human brand is not enough - it needs to carry deeper meaning and purpose.

HOW HAS IT BEEN DEVELOPING?

There's been a shift in which stories are being told, and the way they're communicated. In a **Visual Democracy**, there's a desire to remove barriers between teller and listener, make the stories immersive as possible through the use of first-person video and geo-fenced snippets of audio that are tangibly linked to another's memories. While tales of nostalgia continue to appeal, the focus on 'true' stories has taken an altogether darker turn. 'Decay porn' is an offshoot of this: there's a fascination with reclaiming negative history. Certain brands are letting negatives take centre stage as they look for excuses to confound expectations and assumptions around brand honesty.

Who & Where

Gen Y + Brand-aware Gen X + Eco-conscious boomers, globally (stories are universal)



“The opening up, rather than the hiding of difficult history is what has made Berlin a booming tourist destination. Indeed the resurrection of history could be said to be its major industry.”

Roger Boyes,
Germany and East Europe Editor, *The Times*



The London School of Business found that people retain

65 to 70%
of information shared via a story

VS

5 to 10%
of information conveyed through statistics

(Source)

WHAT ARE THE SIGNS?



Japanese food guide Shominchelin positions itself as resolutely “anti-Michelin”, rejecting homogeneous ranking by an expert elite.



An ongoing research project which seeks to offer the viewer a “mental, psychological or spatial pair of shoes to step into.”



A gallery in an old Nazi air raid shelter, a members club in an old Communist Party HQ, a boutique Hotel in an old KGB building.



After battling years of meth addiction, in and out of prison, Dave Dahl is a baker - and a very successful one too. His story has won over thousands.



Ruin porn's biggest victim. *Vice* complain: “You can't [throw a stone] without hitting some schmuck with a camera worth more than your house.”



Nokia admitted its long-running Symbian platform couldn't compete with iOS or Android and signed a deal with Microsoft Windows 7.

Section 3 STATIC



RISING SOCIAL CONSCIENCE
NATURAL MINDSET
SOCIAL PARTICIPATION
SLOW
SIMPLE INTERFACES
BLENDED REALITY
MASS CUSTOMISATION
ATTENTION ECONOMY
HYPERLOCALISATION

Static trends



Rising Social Conscience

A growing backlash against 'greed culture' coupled with a genuine desire to do something wholesome and 'give something back'. It has also been referred to as the 'moral reset'.



Slow

Slow allows people to invest time in the things that matter and has created a polarisation in behaviour between functionality and richness of experience.



Mass Customisation

Consumers' needs vary from one moment to the next; **Mass Customisation** gives them intuitive and exciting ways to customise products, services and experiences.



Natural Mindset

A stringent avoidance of the artificial in all walks of life, seeking out experiences and products with a definitive, plausible origin (rooted in nature or science).



Simple Interfaces

People are making decisions to help them simplify and streamline their lives, spurred on by economic austerity. **Simple** is about intuitive interfaces and complex filters. It is not about 'basic'.



Attention Economy

People are information rich but attention poor. Irrelevant interruptions are unwelcome. Time is people's most precious commodity, evidenced by the savouring of downtime.



Social Participation

Mass social participation is embraced as the antidote to information isolation and overload. Directly linked to **Rising Social Conscience**, it's a shift from a 'me' to a 'we' culture.



Blended Reality







Online and offline worlds are no longer separate entities. People have multiple experiences in reality and virtuality, switching between the two seamlessly to enhance their experience.



Hyperlocalisation

A focus on local community, local produce and local news - accessed online or off - and resulting in new product development which caters to a community or region.

Explore SECTION 1

| | On Canvas8 | External | | On Canvas8 | External |
|---|---|--|---|--|--|
|  <p>Being+</p> | <p>Being+ Quickfacts: Being+ Functional foods Goalpher Vagueness and motivation Mind games</p> | <p>blogs.telegraph.co.uk chicagotribune.com lifonaut.com bbhlabs.com guardian.co.uk bbc.co.uk</p> |  <p>Life as an Enterprise</p> | <p>Life as an enterprise Enterprise everywhere The bored at work network The Adventurous 500 Learnable Atypic store</p> | <p>thersa.org thenextweb.com twistimage.com businessinsider.com callroomservice.nl fastcompany.com</p> |
|  <p>Conscience Confusion</p> | <p>Apathy, youth and politics Women, WOM and trust Making France optimistic</p> | <p>cnngo.com guardian.co.uk comatonse.com newsweek.com theconversation.edu.au policyinnovations.org</p> |  <p>Identity Games</p> | <p>Personal branding and ID play Digitising the underground Privacy and panopticons Hacking ID and authenticity Gender play Weavrs</p> | <p>digitaldebateblogs.typepad techcrunch.com nytimes.com emergentbydesign.com wired.com telegraph.co.uk</p> |
|  <p>Byegender</p> | <p>Byegender Gender play Les Petroleuses Herbivore men Stay-at-home dads New female aesthetic</p> | <p>prnewswire.com prosumerreport.com mariansalzman.com guardian.co.uk whatsonxiamen.com blog.nielsen.com</p> |  <p>Public and Private</p> | <p>Public and Private Brands in personal spaces Airbnb Living Room Bangalore Tiny House movement SoFar Sounds</p> | <p>bldgblog.blogspot.com transmediacamp101.wp.com businessinsider.com artiststakingthelead.com mastersofmedia.hum.uva.nl fortune.cnn.com</p> |

Explore SECTION 1

On Canvas8



Serendipity

Courting chance
7scenes
Data, discovery and prediction
Surprise and brand affinity
Color

External

techcrunch.com
speedbird.com
publishingperspectives.com
mascontext.com
chiefamusementdesigner.com
kurzweilai.net

On Canvas8



Living the Dream

Heroic imagination project
IAMPLAYR
The bored at work network

External

hyperorg.com
jakehalpern.com
youtube-global.blogspot.com
techcrunch.com
michelreilhac.blogs.arte.tv
pikaba.com



Impermanence

Impermanence
Pop-up apps
Agile business, agile marketing
Club Kanazawa
Nostalgia in the digital age
ReDigi

nytimes.com
brazilianideas.com
possibilian.com
npr.org
digitallabblog.com
emeraldinsight.com

On Canvas8



Visual Democracy

The viewer owns the screen
Video Genie
Dialogue cafe
People of the screen
Visual culture in the UAE
The Italian Experience

External

gigaom.com
kk.org
techcrunch.com
drewconway.com
internetretailer.com
idostream.com

Explore SECTION 2



On Canvas8

External

On Canvas8

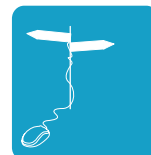
External



Brand Me

Social betting
The Joneses go digital
Uniqueness and WOM
Cloud girlfriend
Persona
Honestly

healthland.time.com
briansolis.com
nytimes.com
fastcompany.com
businessoppsandideas.com
trendwatching.com



East/West

East and West
Man in the machine
Changing attitudes to death
Church of the latter day dude
Bangkok mediplex

brainpickings.org
mckinseyquarterly.com
blog.iconoculture.com
guardian.co.uk
rubypseudochat.com
miller-mccune.com



Codes of Conduct

The ignorance industry
Diesel Island
Project VRM
Singapore Kindness Movement
E-kids
Captains of Industry

observer.com
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nytimes.com
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Hyperawareness of Health

Self-medication in India
Bangkok mediplex
GE Care Innovations
apotake

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geekmom.com
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Collaborative Living

Active journalism
La Maison des Babayagas
Reimagining Cleveland
Quickfacts: DIY demographics
Village Telco
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Informed Consumerism

Emotionals and Vulcans
Porkcamp
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True Life Costs
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Neo-tribalism

Spain's punk publishers
Nostalgia in the digital age
Quickfacts: DIY demographics
Porkcamp
Galeria do rock

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Sustainable change part 1
Sustainable change part 2
B-line
Mariposeando
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Privacy and Control

Data is king
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PlanIT Valley Portugal
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True Stories

The scent of Revolution
Boese Orte
War in the first person
Being There
Shominchelin
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About Canvas8



Canvas8 is an independent behavioural insights agency. We work with a network of global thought leaders and industry experts to generate in-depth, authoritative analysis of what people are doing and why.

We mine a rich seam of intelligence from our network of industry insiders and globally recognised Thought Leaders, supplemented by our team of rockstar academics.

Our research is used to underpin corporate strategy, innovations strategy and communications strategy.

We've been fortunate enough to work with the likes of Danone, Coca-Cola, The Post Office, Ford, FremantleMedia and Channel 4 as well as leading agencies including AMV, Edelman, Mother, Naked Communications and Universal McCann.

We tailor our service to your requirements. This includes database access, qual and quant research, visions days, strategic consultancy, workshops, videography and industry panels.

If you would like to **find out more** about Canvas8, TABS or any of our other services, please contact our Head of Sales and Marketing Oliver Chubb (olly@canvas8.com).

We hope you've enjoyed reading TABS. Thank you for exploring.



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