



# Consumer Trends

## [2006]

A collection of macro trends that are shaping the lifestyles of youth over the next couple of years.

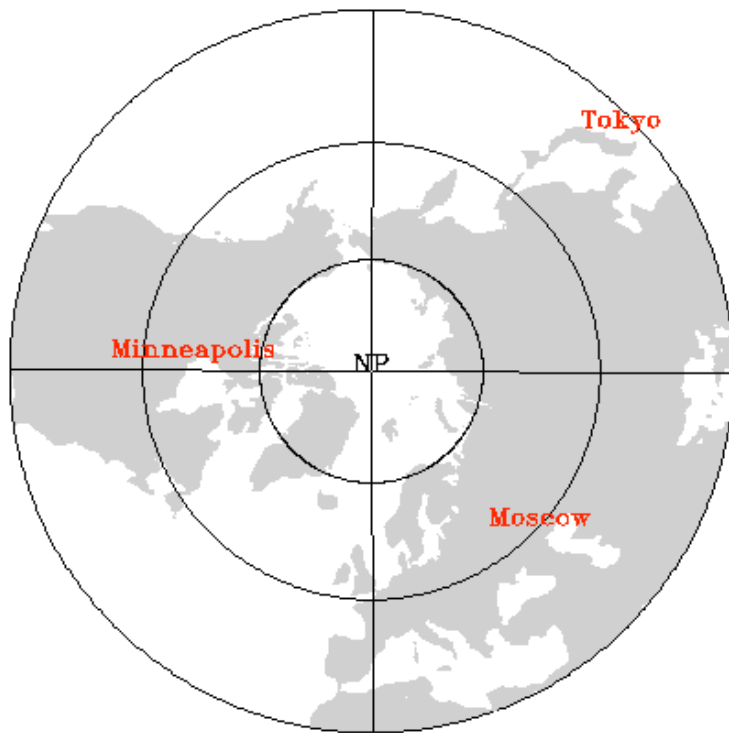
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# consumer trends

- i. Globalization, Localization, Fragmentation, Digitization
- ii. 14 Macro consumer trends impacting us now, and tomorrow
- iii. And some brand trends that are hot too

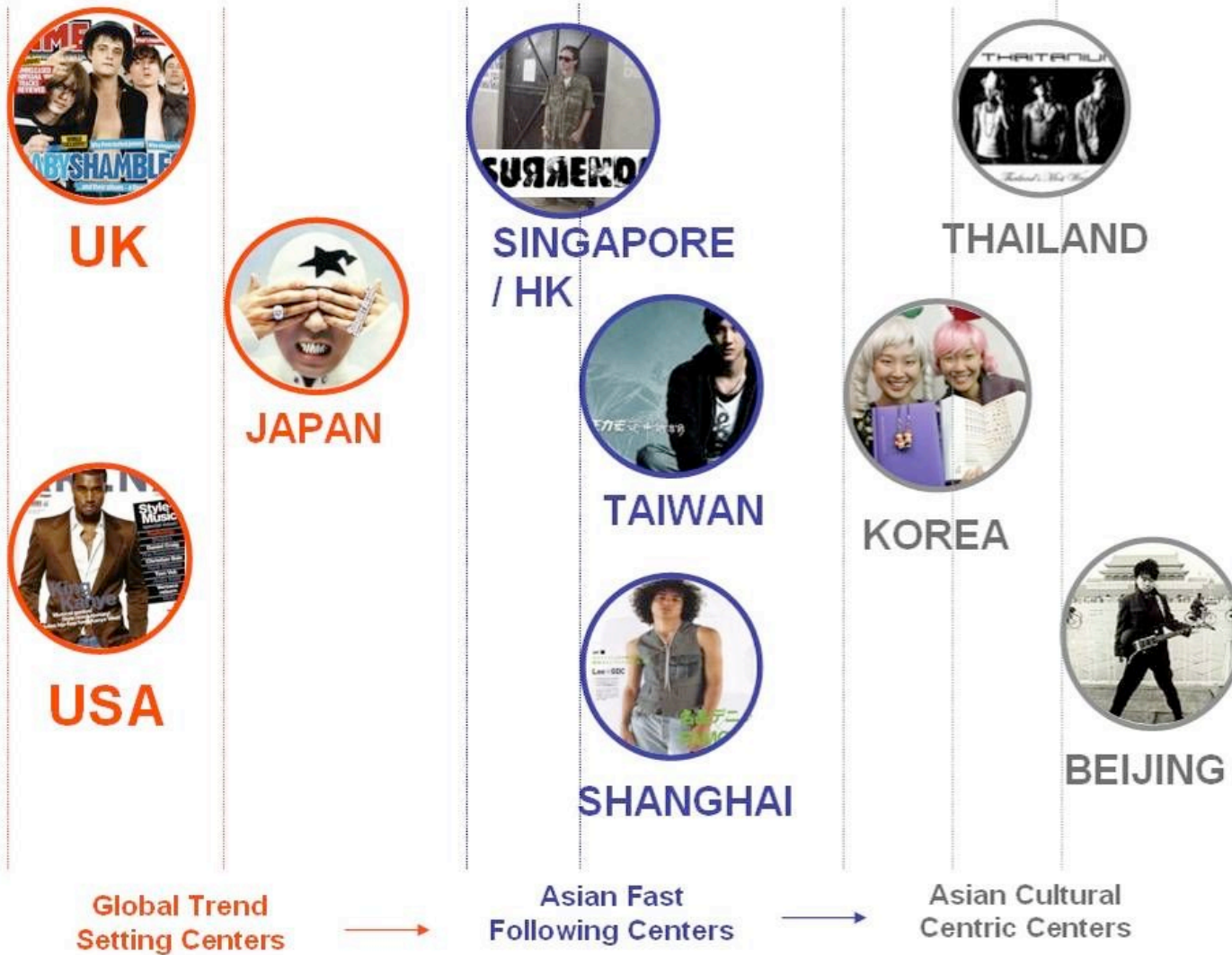
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## The flow of trends

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the macro trends  
that are shaping  
who we are this  
d e c a d e



**Globalization** --- going out into the world, absorbing influences



**Localization** --- growing national pride, growing cultural exports



**Digitization** --- we are all six degrees (or less) apart, and LOVING it



**Fragmentation** --- the splintering of popular culture



# Globalization

News travels fast – we know what’s happening as it happens. And with cheaper and cheaper travel, we can also get “there” with less of an outlay.

The world has never been so small, and we have never been keener to get out and explore – physically, or virtually via TV or PC.

A fascination with interesting themes and concepts from other places is a very solid trend, and one that will be around for many years. It is clearly one that brands can leverage regionally and globally.



# Localization

As the world gets smaller, national pride is getting stronger and larger.

When the rest of the world is beating down your real or virtual door to take a look inside, a Nation gains confidence, increases efforts, and sends out more cultural exports --- look at London and Japan over the last decade, Korea and Brazil over the last year, and the rise of China, India and Russia as cultural hotspots in the coming decade.

There are huge opportunities for exporting national brands to a curious and eager world.



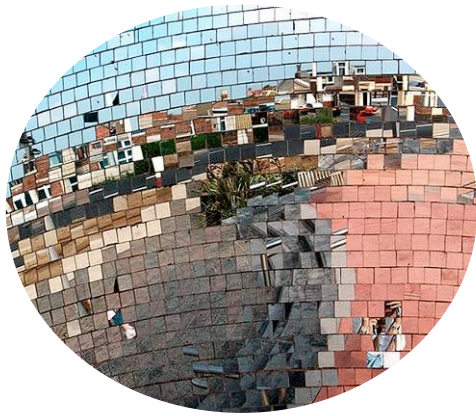


# Digitization

Broadband, Bit Torrent, MP3, P2P, 3G, TiVO, DVD-R, Blackberry, Blogging, Podcasting, Bluejacking, home theatres, plasma screens, MySpace...

Everyone is becoming “six degrees” or less apart, and by-and-large, LOVING IT. 99% of the time. People are more confident with technology, and becoming more able to switch on, and switch off.

Experts are predicting the following big tech trends in 2006: Wi-Fi everywhere, Internet TV, streaming video into everything, Bluetooth content on the fly, and the digital home explosion...



# Fragmentation

Sub-sub-sub-genres in music, niche media, cut'n paste fashion, multiple youth tribes, international film everywhere, an explosion of the arts...

The Media can't keep up with the splintering and fusing of pop culture, and the globalization / localization of it. Consumers are reaching out everywhere for everything: it's an information and ideas explosion.

Brands can act to help guide consumers thru and to the options, and can act as ambassadors of new ways to do things.



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Our primary focus for trend monitoring is changes in the lifestyle of urban young adults in Asia and around the world – who we call the “**globally connected urban tribe**”





## globally connected urban tribe

male/female. “20-something”. middle-upper class. urban dweller. educated. working. blue-chip. boutique. entrepreneur. well-traveled. bars. clubs. restaurants. cafes. galleries. film. exhibitions. social. gym. spa. yoga. pilates. balanced. media hungry. gadgets. real world. virtual world. high speed. wireless. connected. casual. luxury. fashionable. opinion leader. trend conscious. trend watcher. trend setter. confident. successful. **in control.**



These “20-something” consumers are a core client base ...  
They are the trend setting opinion leaders to those younger and those  
older than themselves today.

**They are an important customer sweet spot.**

Source: Filter / Synovate Trends

14

consumer  
trends



# consumer trends

forever young / gen gap blur / peter pan  
authorship / p2p / six degrees / passion groups  
wellness / simplicity / slow down  
heritage / retro / roots / back to go forwards  
mobility / field trip travel / experiential journeys  
content management / data storage / documentation / librarian  
culture blending / fusion / expatriatism  
genuineness / reality / true colors / transparent  
crisis management / immortality / fatalism  
self-enhancement / learning is fun / hobby classes  
from bigness to smallness / intimate experiences / comfort  
mix 'n match / cut 'n paste / customization  
luxury twisted / bling goes suave / what you do / fashion understated  
indie spirit / underdog / raw energy / realness



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# one

forever young / gen gap blur / peter pan

No pressure to act your age. Being 30 acting 20, 40 acting 30. Video games, casual wear, hello kitty, anime, manga comics, cartoons for all ages. Parents as friends, friends from all ages. Knowing when to be serious, but enjoying acting like a kid. Having fun, being light.

**Forever young.**



**Brands like Pixar, Apple, Mini, Puma, Xbox, and LV are tapping into this trend with much success ...**

# two

authorship / p2p / six degrees / passion groups

The blog explosion, coupled with peer-2-peer free file sharing has opened up a world of new virtual friends, with common interests and passions. Online diaries to share your views, online clubs to meet others, friend finders, alumni searches, meeting new people, re-connecting with lost ones. Six Degrees or less.



**Check out [skype.com](http://skype.com), [myspace.com](http://myspace.com), [youtube.com](http://youtube.com), [friendfinder.com](http://friendfinder.com), ([adultfriendfinder.com](http://adultfriendfinder.com)), [hi5.com](http://hi5.com), and Korea super-site [cyworld.com](http://cyworld.com) ...**



# three

w e l l n e s s / s i m p l i c i t y / s l o w d o w n

The move to wellness, via the boom in spas, yoga, pilates, treatments and retreats has been present for several years. It has yet to peak. People want to escape, take-care, pamper, revive, and slow down more than ever. As the trend matures, expect it to swing from it's current "feminine" slant to become more unisex, if not splintered to cater for male needs too ... this is not m e t r o s e x u a l .

**This is the beginning of a very long term trend of balance.**



**Brands like Planet Yoga, Planet Fitness (and others) plus Chiva Som, and hotels like the Conrad are well on the way to offering unisex wellness ...**

# four

heritage / retro / roots / back to go forwards

An interest in the history, heritage and roots of modern concepts has fueled music, fashion and design trends so far this decade. Consumers have been digging back to discover how things started. The trend is so powerful that there has been little desire for futuristic concepts. However change is afoot; the year 2010 is coming up. Expect this trend to swing soon and fast.



**Brands like adidas, Nike, Puma have all built and profited from this trend, as have record labels and documentary producers. But what's coming next?**

# five

mobility / field trip travel / experiential journeys

Leisure travel no longer means a year saving for a two week global tour. Adventurous young adults are jetting off for long weekends several times a year to do specific things in nearby countries – shopping at the weekend markets, clubbing in Shibuya, eating in Kowloon. Intense experiences with a purpose. Cheap airline, luxury hotel. Cheap by day, quality by night. Field trip travel. Friends in many cities. Knowing what's hot. Mobility.



**From Lonely Planet, to LUXE Guides via the boom in travel and lifestyle magazines, websites and TV shows --- people want content about the world.**

# six

content management / data storage / documentation / librarian

In the past four years we have evolved from CD disks capable of holding 700MB, to portable hard-drives which hold 100GB or more of data. This means that we have centralized our digital lives into one place, opening up opportunities for better ways to retrieve and use this content. The next big thing in this space is our ability to manage all the digital content we have acquired --- safely and easily. And then take portions of it with us on the move. Expect the next few years to be defined by a content explosion.



**New devices for storing and accessing digital content --- centrally or on the move. How can brands use these new mediums to also distribute info?**



# seven

c u l t u r e   b l e n d i n g   /   f u s i o n   /   e x p a t r i a t i s m

A clash of globalization (going out into the world) and localization (being apart of the surrounds), the fusing and blending of cultures is like “collaboration culture” for culture. Fusion foods, and trends in music and fashion are showing that mix ‘n match hybrids keep brands fresh and consumers excited. Culture concepts from Japan, Korea, China and beyond. Asians are loving Asia, as is the rest of the world. Absorbing the world in many ways.



**Showing a multi-cultural face, blending the best the world. Thinking locally, regionally, and globally all at once --- brands like MTV are masters at this mix.**



# eight

genuineness / reality / true colors / transparent

Partly as a backlash to the celebrity fever of the 90's, we are seeing a desire for realness all around us – movies & tv, music, fashion, media and spokespeople. While some need “the dirt”, many simply want to know what's going on behind the scenes. This quest for realness has also impacted the design world; with cool, simple, fine-lines preferred over glamour: glitz and gloss.



**Show consumers the “real face” of the brand, be transparent, be genuine.  
Look at how most high end fashion brands now communicate to the world**

# nine

crisis management / immortality / fatalism

Crisis, disaster, terrorism. 9/11, Bali, Tsunami, heightened security. We have experienced threat and danger from unexpected sources up close and very personal in the past few years. People react and respond in different ways, but most of us have thought about if and how we may get placed in harms way. Immortality, pragmatism, fatalism. New views on travel, movement and safety.



**Brands need to keep smiling (Peter Pan), but also consider what can be done, when needed, to offer a sense of safety, security, and peace of mind.**

# ten

self-enhancement / learning is fun / hobby classes

While previous decades were defined by higher education for career enhancement, we are in a period where people are opting for (often obscure) hobby classes for personal expression and fun – art classes, musical instruments, cooking, languages. Not to get a pay rise, but a good way to release pressure, meet others, and feel e m p o w e r e d .



**What could a brand offer in terms of fun learning, that benefits both sides?  
There are no wrong answers in this space.**

# eleven

from bigness to smallness / intimate experiences / comfort

Another swing of the pendulum, this time from big to small – super clubs to tiny bars, big festivals to intimate live gigs, big brands as leaders to small brands as supporters (or big brands acting small). People want comfort (simplicity), but more importantly, a desire for intimacy, being surrounded by a few close friends, feeling familiar, safe, and secure.



**Big brands like Motorola, Heineken, Virgin, Puma are acting “small”, while the boom in Member Clubs and Private Bars are offering gated familiarity.**



# twelve

mix 'n match / cut 'n paste / customization

Influences from across the decades, old with new, high meets low, catwalk meets the street. The new rule is “no rule” though this has really been the case for most of the decade. Consumers are not being led by one influence anymore, but are following many, or making it up as they go. Brands don't need to be so rigid in their delivery – mashing up tone, manner and style works more than ever



**Global fashionistas have been onto this for a while, though “the look” is now seen throughout the world, as it now is in music and other areas of pop culture.**



# thirteen

luxury twisted / bling goes suave / what you do / fashion understated

Consumers are turning away from the “bling bling” lifestyle that hip hop portrayed. High end fashion continues to push “luxury casual” - \$300 jeans, \$200 sneakers, \$1000 sports watch. Leisure fashion is taking itself upmarket. Spending patterns are changing, with more \$\$\$ now going to the experience – what you eat, where you travel, how you kill time, how you take care of yourself.

**Understated extravagance.**

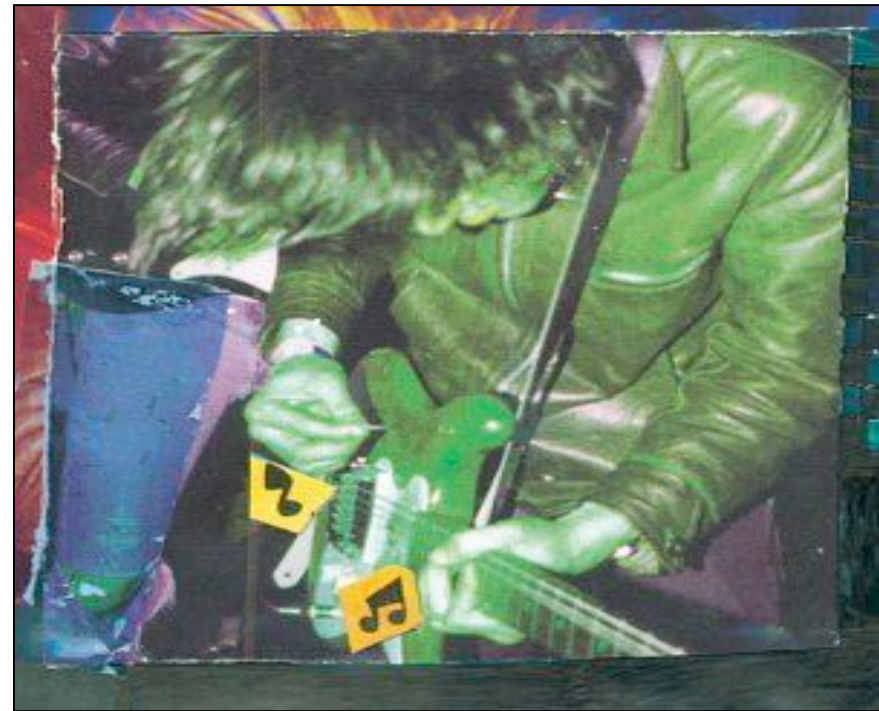
**Finding ways to present extravagance and luxury in new, interesting and understated ways will excite consumers.**



# fourteen

indie spirit / underdog / raw energy / realness

A look to the music charts – a strong barometer of pop culture shifts – shows a move away from electronic and US-driven urban music towards independent raw UK bands and related fashion themes. “Indie” record labels, fashion labels, films, and bars are storming the large players. Youth are seeking new sources of rebellion, aggression and creativity.



**Turn your trend radar towards London and start monitoring breaking trends for a view on what's coming next – look at what (French) Dior has done of late.**

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i n t i m a t e  
u n d e r s t a t e d



Source: Filter / Synovate Trends

# fragmentation



Being able to satisfy a diverse range of consumer tastes, desires and wants. Yet maintaining a consistent brand position

# individuality





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Source: Filter / Synovate Trends



## Ian Stewart, VP Research & Planning MTV Asia

Came to Asia from Sydney in 1990 after university. Worked for British qualitative agency **MBL** for 5 years – Bangkok, Jakarta, Hong Kong. Then as Trend Manager for **Coca-Cola** in North Asia in Hong Kong. Moved to **MTV Asia** as head of research and strategy in Singapore. Then head of planning for **Ogilvy** Thailand in Bangkok. Founded **Filter** in 2000. Built the company to 80 people in five countries. Acquired by **Synovate** in 2005. Global head of Trend Research unit. Now VP Research & Planning at **MTV Asia**

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