

FIVE HUMAN ASPIRA TIONS



& THE FUTURE OF BRANDS

Foreword

Like never before, brands are navigating an era of constant change.

From data breaches and market volatility to information overload and lightspeed digital evolution, uncertainty abounds. In virtually every industry and category, incumbents are being challenged by upstarts as the marketplace moves faster than ever before.

Brand leaders are at the center of these dynamics, balancing the complexities of brand reputation, consumer trust, radical transparency, hyper-customization and, of course, business sales and growth.

So, in this age of uncertainty, how might we leverage these dynamics for competitive advantage? How might we deliver more value for consumers, employees, shareholders and society?

How might we create brands of enduring value that are relevant to a new generation and resilient for a new world?

We believe an important part of the answer lies in the rise of Aspirationals—more than one-third of the global public—who unite a love of shopping, social status and sustainability values to shape new cultural norms and rewrite the rules of marketing.

In this report, “Five Human Aspirations and the Future of Brands,” we detail a fundamental shift in the marketplace towards authenticity, wellbeing, sustainability and social purpose. And we reveal how the deepest hopes, needs and aspirations of a rising generation of consumers will define our future.

By understanding the Aspirationals—who they are, what they care about and why they matter—brand leaders will be inspired to think more creatively, design more holistically and act more purposefully for a world where we can thrive in change together.



Table of Contents

4 INTRODUCTION:
The Rise of the Aspirational Consumer

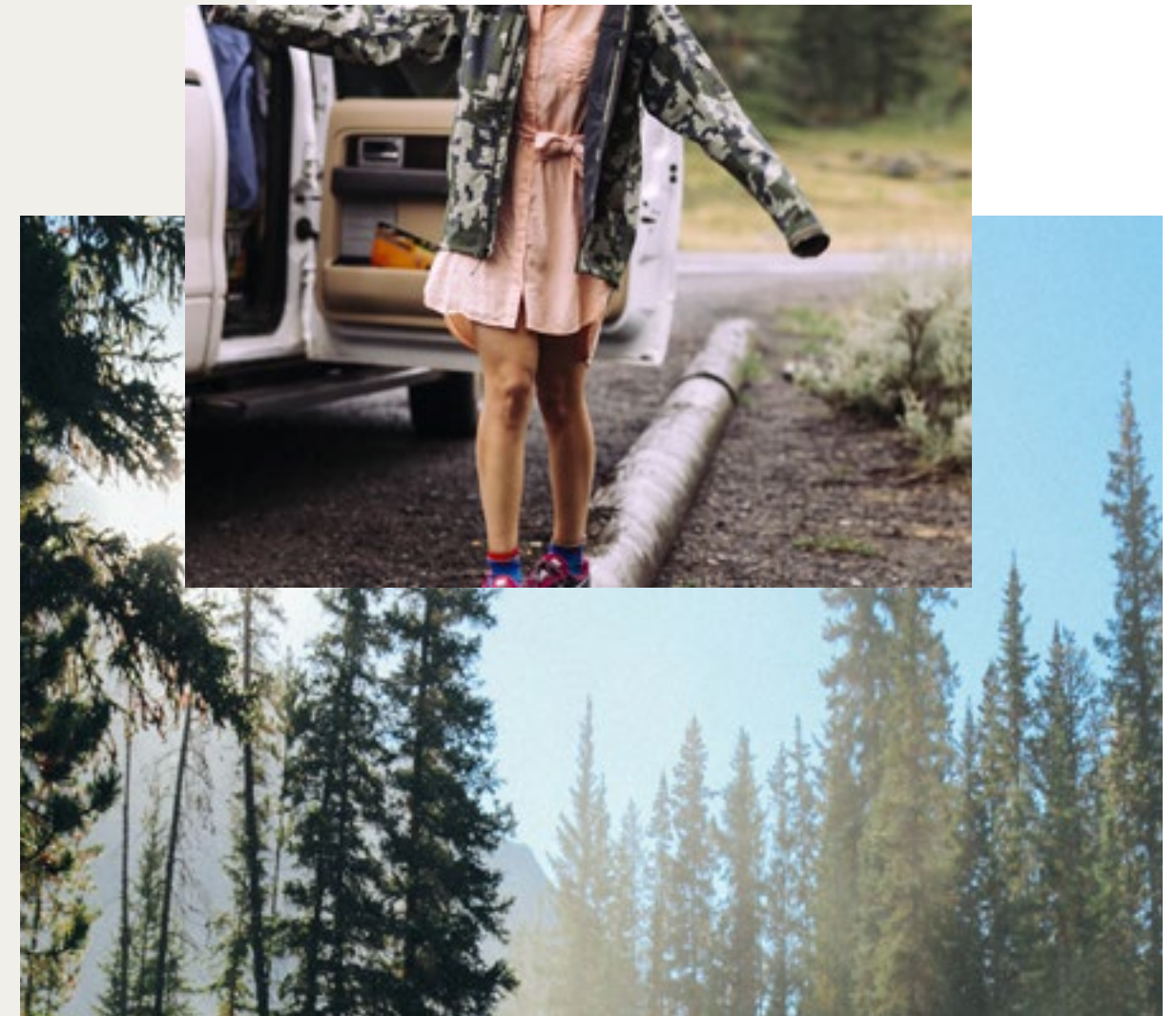
5-12 PART ONE:
Aspirational Segmentation

13-16 PART TWO:
Beliefs and Behaviors

17-20 PART THREE:
A Closer Look at Key Issues

21-51 PART FOUR:
***Five Aspirations That Hold
the Future for Brands***

52-53 TAKEAWAYS:
Key Learnings for Brand Leaders





The Rise of the Aspirational Consumer

We marketers can be obsessed with generational trends. How many meetings have you had lately on what Millennials think of your brand? Or what Generation Z means for your digital strategy?

And yet, while important, we may be asking the wrong questions. Or, at least seeking insights and revelations in the wrong place.

The truth is that generations are defined by more than birthdays. Our generational identity is formed by the common human experiences that shape the very idea of who we are and the understanding of our place in the world around us.

In the emerging 21st century, a generation—shaped by 9/11, perpetual wars, economic crises and environmental threats—is experiencing an equal and opposite reaction toward generosity, creativity, collaboration and caring.

Indeed, building on four years of global insight from more than 22,000 respondents across 22 international markets, BBMG and our partners at GlobeScan have revealed the Aspirational generation who combine a love of style, social status and sustainability values to shift cultural norms and rewrite the rules of marketing.

This Aspirational generation isn't defined by age, but rather the desire for their actions to meet their needs, have a positive impact on others and connect them with an ideal or community that's bigger than themselves. Representing 39 percent of the global adult population, Aspirationals are connecting the right thing to do with the cool thing to do, creating new possibilities for brands, business and the society we share.



PART ONE:

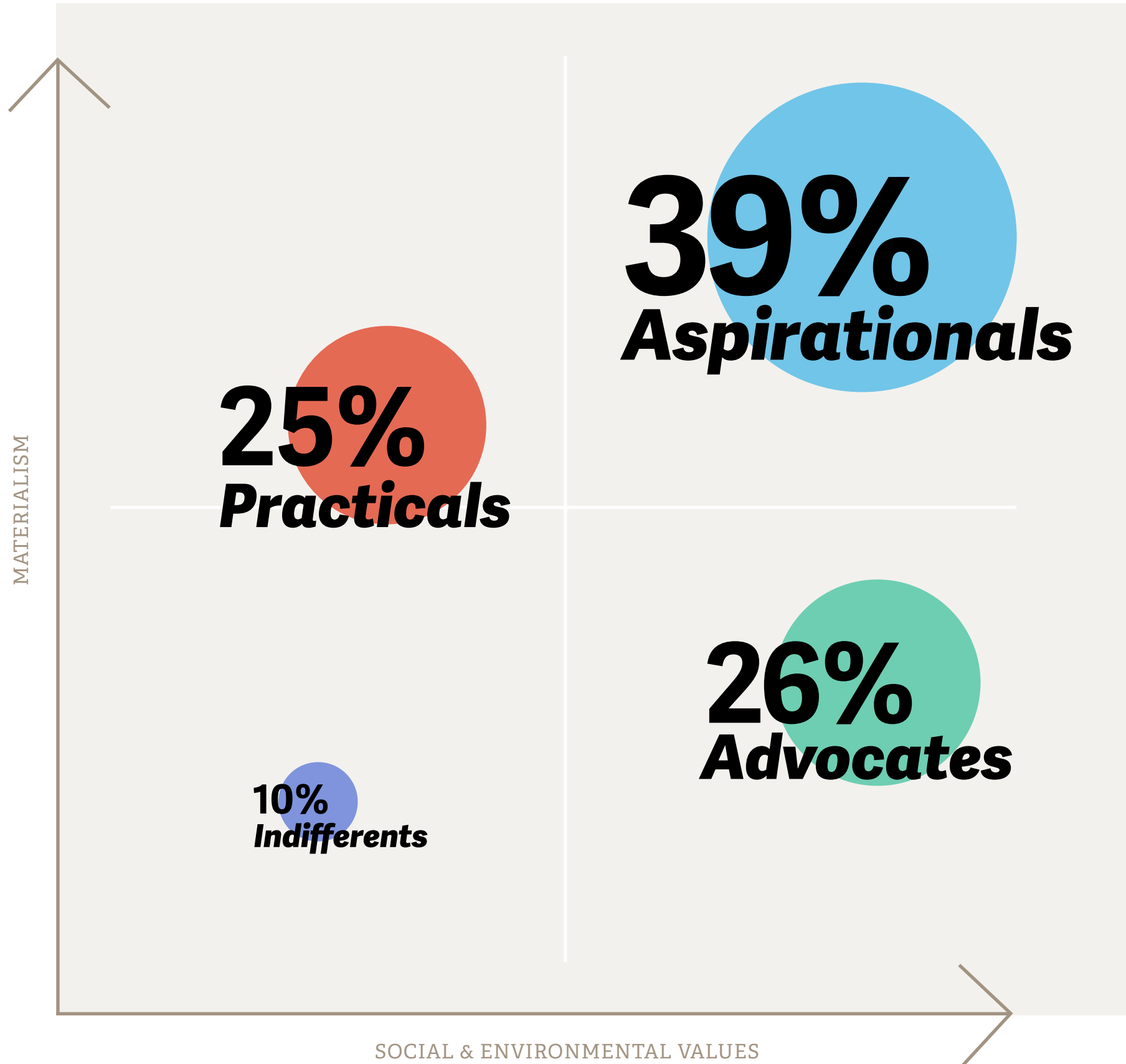
Aspirationals Segmentation

Aspirationals are represented across every age, culture, geography and income. Globally, they are most likely to be Millennials, the largest presence in emerging markets and increasingly parents with children under age 18.

Global Consumer Segmentation

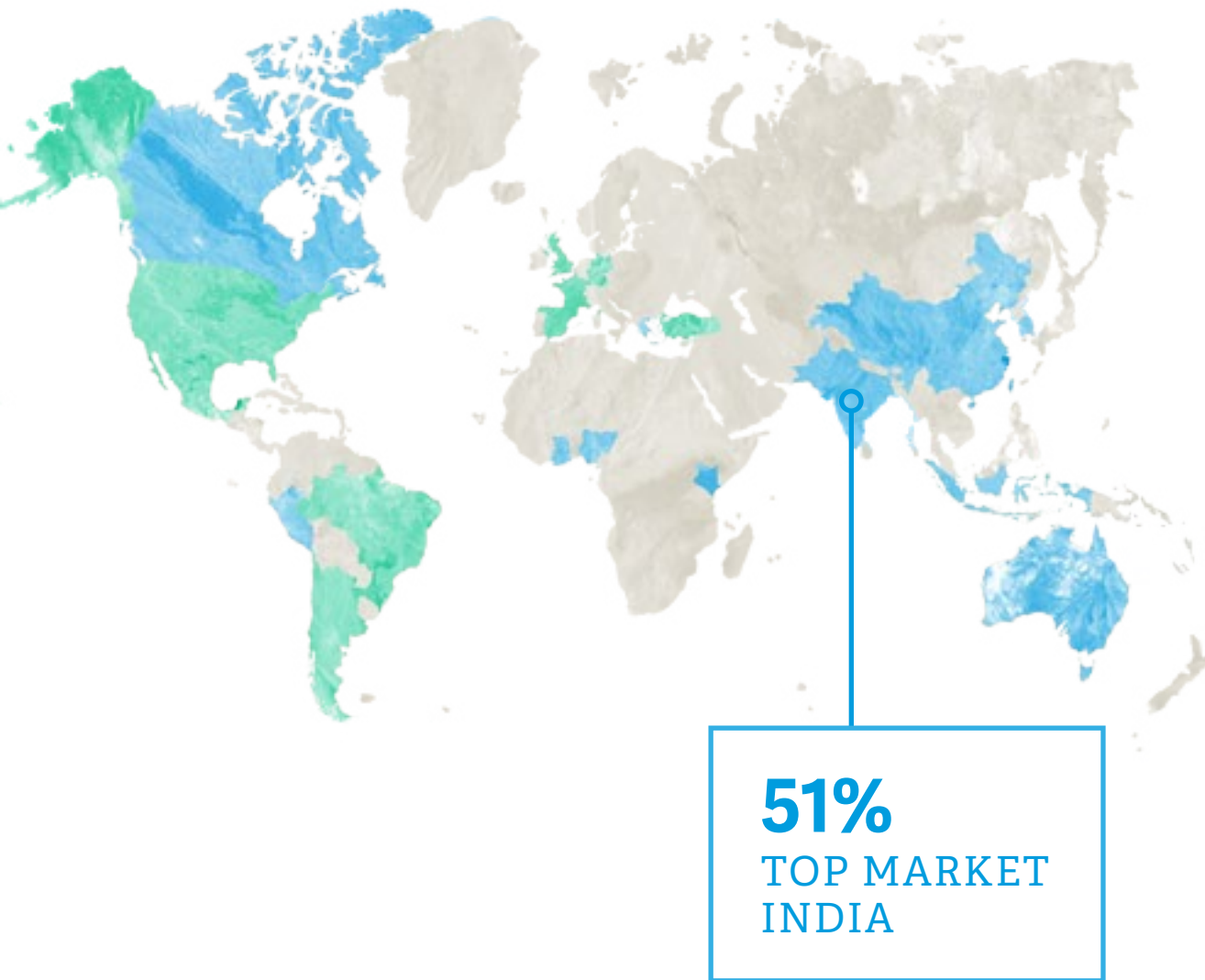
The Aspirational segmentation explores the intersection of consumer needs, desires and shopping behaviors with social and environmental beliefs, values and priorities. The segmentation reveals a spectrum including highly committed Advocates (26% of consumers globally in 2015), style and social status-seeking Aspirationals (39%), price and performance-minded Practicals (25%) and the less engaged Indifferents (10%).

More than any other segment, Aspirationals are defined by their love of shopping, desire for responsible consumption and their trust in brands to act in the best interest of society. And, as the largest consumer segment globally, Aspirationals matter because they are the first to unite materialism, sustainability values and cultural influence, making them an essential audience to build markets, influence cultural norms and shape behavior change at scale.



Aspirational: By the Numbers

Aspirationals represent 39% of the Global Public and are most likely to be Millennials, skewing younger in developing markets.



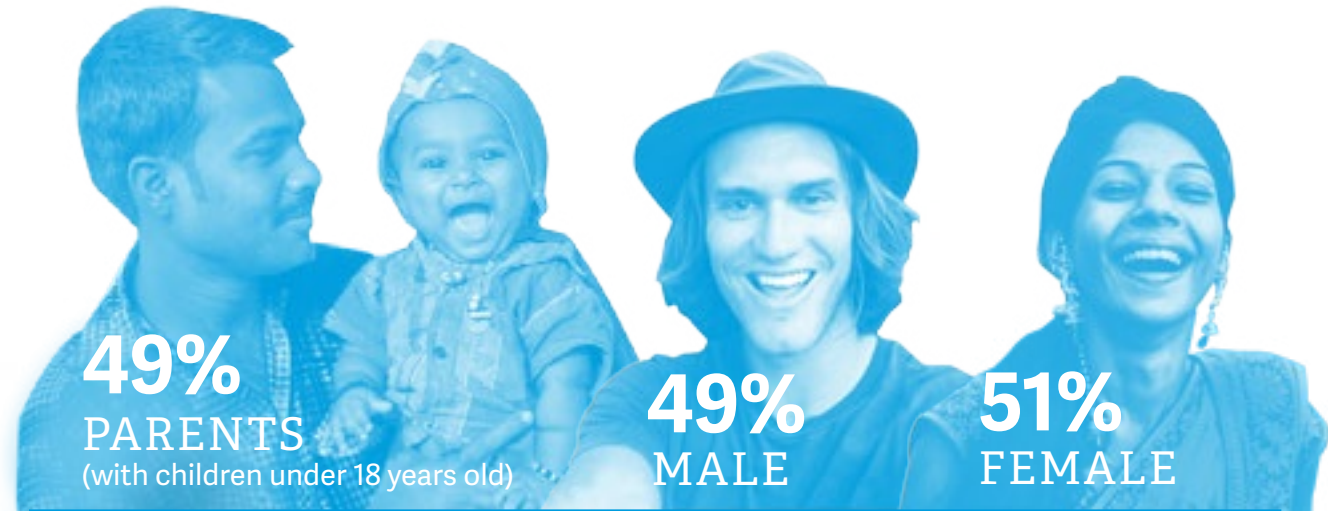
AVERAGE AGE:

40

AVERAGE EDUCATION:

High School

PEOPLE:



GENERATIONS:

35%
MILLENNIALS



34%
GENERATION X



20%
BABY BOOMERS



11%
SENIORS





Advocates have been the traditional focus of sustainable consumerism because of their willingness to pay more for socially and environmentally responsible solutions.

MOST LIKELY:

Generation X

26%
GLOBAL
PUBLIC

93%
RESPONSIBLE
CONSUMERS

28%
STYLE
FOCUSED

WHY THEY MATTER:

Though relatively small in size, Advocates do their homework and have the potential to disproportionately influence others by taking action on issues and causes they care about.

BARRIERS:

They don't like shopping and they don't see brands as a solution. They don't trust global companies.

OPPORTUNITIES:

Brands should honor the Advocates by authentically addressing their concerns and being rigorous in any social or environmental claims.



Practicals are laggards in purchasing more sustainable products; while they're not opposed to sustainability they see it as a bonus after price and performance.

MOST LIKELY:
Millennials

25%
GLOBAL
PUBLIC

A horizontal bar chart with a red segment representing 25% of the total bar.

50%
RESPONSIBLE
CONSUMERS

A horizontal bar chart with a red segment representing 50% of the total bar.

53%
STYLE
FOCUSED

A horizontal bar chart with a red segment representing 53% of the total bar.

WHY THEY MATTER:

Practicals' impact comes from the likelihood that they are tipping-point consumers when trends hit scale.

BARRIERS:

They are discouraged by high prices, and they aren't likely to take the time to look for sustainable products.

OPPORTUNITIES:

Practicals are more likely than others to trust consumer reviews, ratings and proven performance.



Indifferents are the least likely to engage in the sustainable economy.

MOST LIKELY:

Generation X

10%

GLOBAL
PUBLIC



54%

RESPONSIBLE
CONSUMERS



6%

STYLE
FOCUSED



WHY THEY MATTER:

Indifferents are unlikely to make proactive choices for more sustainable goods, so brands will drive health and sustainability for these purchasers by embedding positive impacts in how products are made.

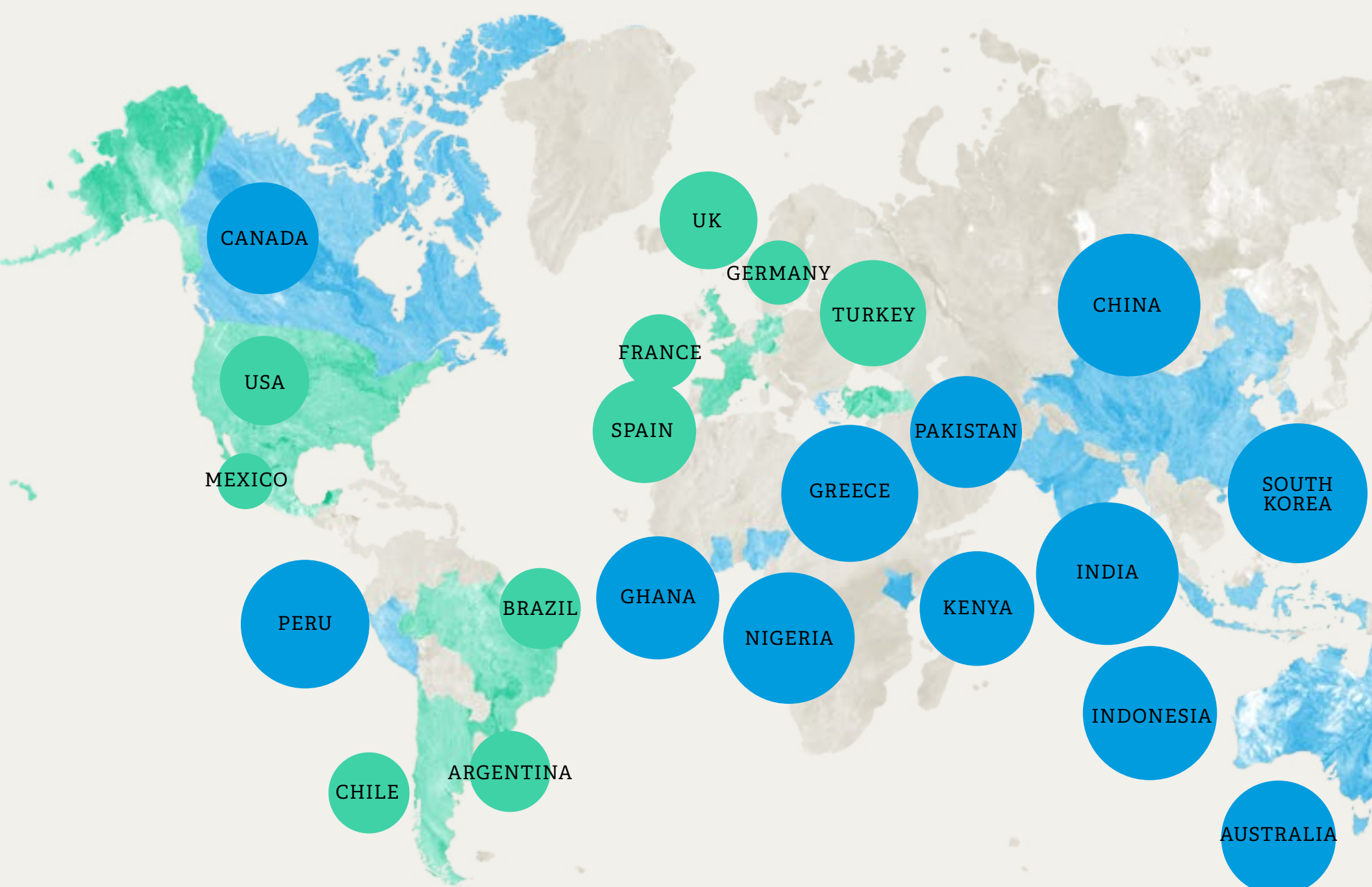
BARRIERS:

They are least likely to feel a sense of responsibility to society with their purchases. They don't place a high priority on products with social or environmental benefits. They are the least likely of any segment to try new things.

OPPORTUNITIES:

Indifferents will ultimately follow the marketplace.

Global Presence



22
COUNTRIES

N=22,000

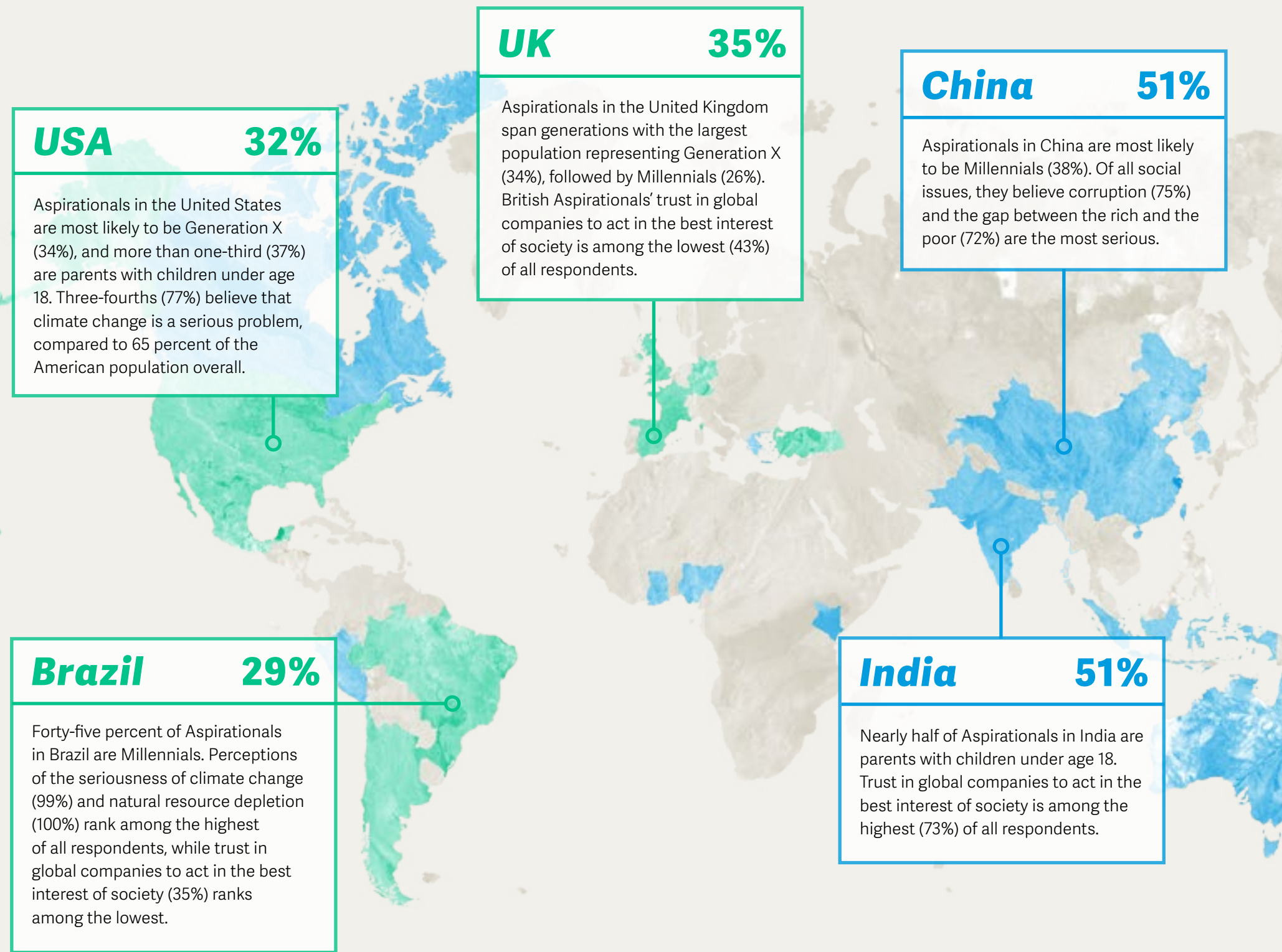
40%–60%
ASPIRATIONALS

- CHINA-51%
- INDIA-51%
- S. KOREA-50%
- GREECE-49%
- INDONESIA-48%
- NIGERIA-47%
- PERU-46%
- GHANA-44%
- AUSTRALIA-41%
- KENYA-41%
- CANADA-40%
- PAKISTAN-40%

20%–39%
ASPIRATIONALS

- TURKEY-38%
- SPAIN-37%
- UK-35%
- USA-32%
- ARGENTINA-29%
- CHILE-29%
- BRAZIL-29%
- FRANCE-29%
- GERMANY-23%
- MEXICO-20%

Global Presence



UK 35%

Aspirationalists in the United Kingdom span generations with the largest population representing Generation X (34%), followed by Millennials (26%). British Aspirationalists' trust in global companies to act in the best interest of society is among the lowest (43%) of all respondents.

China 51%

Aspirationalists in China are most likely to be Millennials (38%). Of all social issues, they believe corruption (75%) and the gap between the rich and the poor (72%) are the most serious.

USA 32%

Aspirationalists in the United States are most likely to be Generation X (34%), and more than one-third (37%) are parents with children under age 18. Three-fourths (77%) believe that climate change is a serious problem, compared to 65 percent of the American population overall.

Brazil 29%

Forty-five percent of Aspirationalists in Brazil are Millennials. Perceptions of the seriousness of climate change (99%) and natural resource depletion (100%) rank among the highest of all respondents, while trust in global companies to act in the best interest of society (35%) ranks among the lowest.

India 51%

Nearly half of Aspirationalists in India are parents with children under age 18. Trust in global companies to act in the best interest of society is among the highest (73%) of all respondents.

Aspirationalists have a broad global presence, with particular strength in emerging markets where they make up nearly half of the population, including **India** (51.4%), **China** (50.8%), **South Korea** (49.9%), **Indonesia** (47.6%), **Nigeria** (46.6%) and **Peru** (45.7%). Similarly, Aspirationalists are a significant presence in developed markets, representing approximately one-third of consumers in markets like **Australia** (41.4%), **Canada** (40%), **Spain** (37.7%), the **United Kingdom** (35.4%), the **United States** (32%) and **Brazil** (29%).

Aspirationalists in emerging markets tend to be Millennials, while in developed markets they are more likely to be Generation X. A snapshot of a few of the largest markets reveals distinct demographics, needs and priorities.



PART TWO:

Beliefs and Behaviors



Aspirationalists are defined by their love of style, shopping and social status. They also share a desire to consume responsibly and influence their peers based on shared interests, passions and values.

Love of Shopping, Style and Status

Aspirationalists are happy shoppers and they see brands as badges of their own identities.

More than any other segment, Aspirationalists say “shopping for new things excites me” (81% Aspirationalists, 57% Global Public and only 34% Advocates), and they are most likely to say they “want to stand out by the way I look, my style” (73% Aspirationalists, compared to 48% Global Public and only 28% Advocates).

This desire for status, recognition and social standing provides an important opportunity for brands to leverage Aspirationalists’ passion and presence as allies, ambassadors and participants in shifting marketplace dynamics and influencing behavior change.

HAPPY SHOPPERS:

“Shopping for new things excites me.”



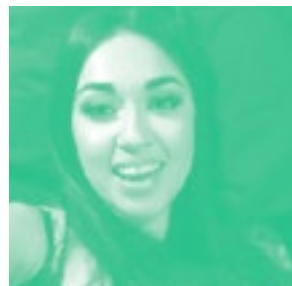
81%
ASPIRATIONALISTS



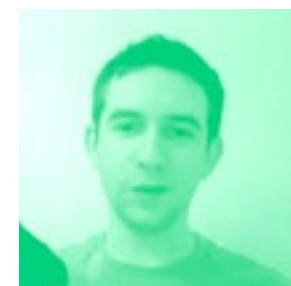
34%
ADVOCATES



57%
GLOBAL PUBLIC



“I love beauty products because of how empowered they make a woman feel.” **Vanessa, 27**



“I like that TOMS embodies the one-for-one philosophy, I’m proud to be associated with the brand.” **Max, 27**

Responsible Consumers and Positive Influencers

Aspirationals are motivated by a sense of idealism and a desire to make a positive impact with their purchases. Aspirationals match Advocates in the belief that “we need to consume less to preserve the environment for future generations (89% Aspirationals, 93% Advocates, 75% Global Public).

Aspirationals are also ambassadors for the brands they admire, equaling Advocates in encouraging others “to buy from socially and environmentally responsible companies,” (86% Aspirationals and Advocates, 66% Global Public).

And yet, more than any other segment, Aspirationals feel guilty when they’re not living up to their own expectations. In trying to live a life that balances their responsibility to the planet with their desire to express themselves and consume, nearly three-in-four Aspirationals say “I feel guilty about my negative impact on the environment” (73% Aspirationals, 55% Advocates, 51% Global Public).

RESPONSIBLE CONSUMERS:

“We need to consume less to preserve the environment for future generations.”



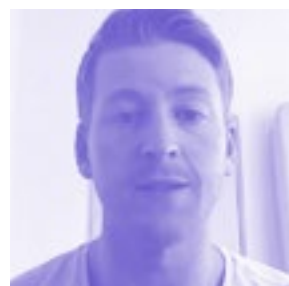
89%
ASPIRATIONALS



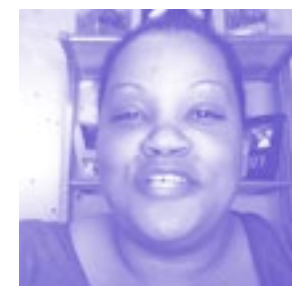
93%
ADVOCATES



75%
GLOBAL PUBLIC



“I like buying clothing that’s made with organic cotton because it’s sustainable and a better clothing purchase.”
Jesse, 30



“We are Apple people. I’m kind of the tech advisor for my friends, so people wait for me to love something before they love it. It’s fun to be able to share and get people into your world.”
Kelly, 39

Optimistic About the Future and Empowered Together

Aspirationalists are defined by their innate sense of optimism and a belief that their actions can make a difference. Even in the context of profound economic, political and social challenges, Aspirationalists are the most likely of any segment to “believe the world is going in the right direction” (49% Aspirationalists, 30% Advocates, 40% Global Public), and that “our children and grandchildren will have a higher quality of life than we do today” (56% Aspirationalists, 38% Advocates, 48% Global Public).

This sense of optimism includes a belief in their power to influence corporate behavior, with nearly eight-in-ten Aspirationalists saying, “as a consumer, I can make a difference in how a company behaves,” (78% Aspirationalists, 75% Advocates, 68% Global Public).

However, they don’t believe they can do it alone, expressing the need to join to create change. Aspirationalists are nearly four times as likely as Advocates to believe that “individuals cannot do much to save the environment” (55% Aspirationalists, 15% Advocates, 41% Global Public).

OPTIMISTIC ABOUT THE FUTURE:

“Our children and grandchildren will have a higher quality of life than we do today.”

56%
ASPIRATIONALISTS

38%
ADVOCATES

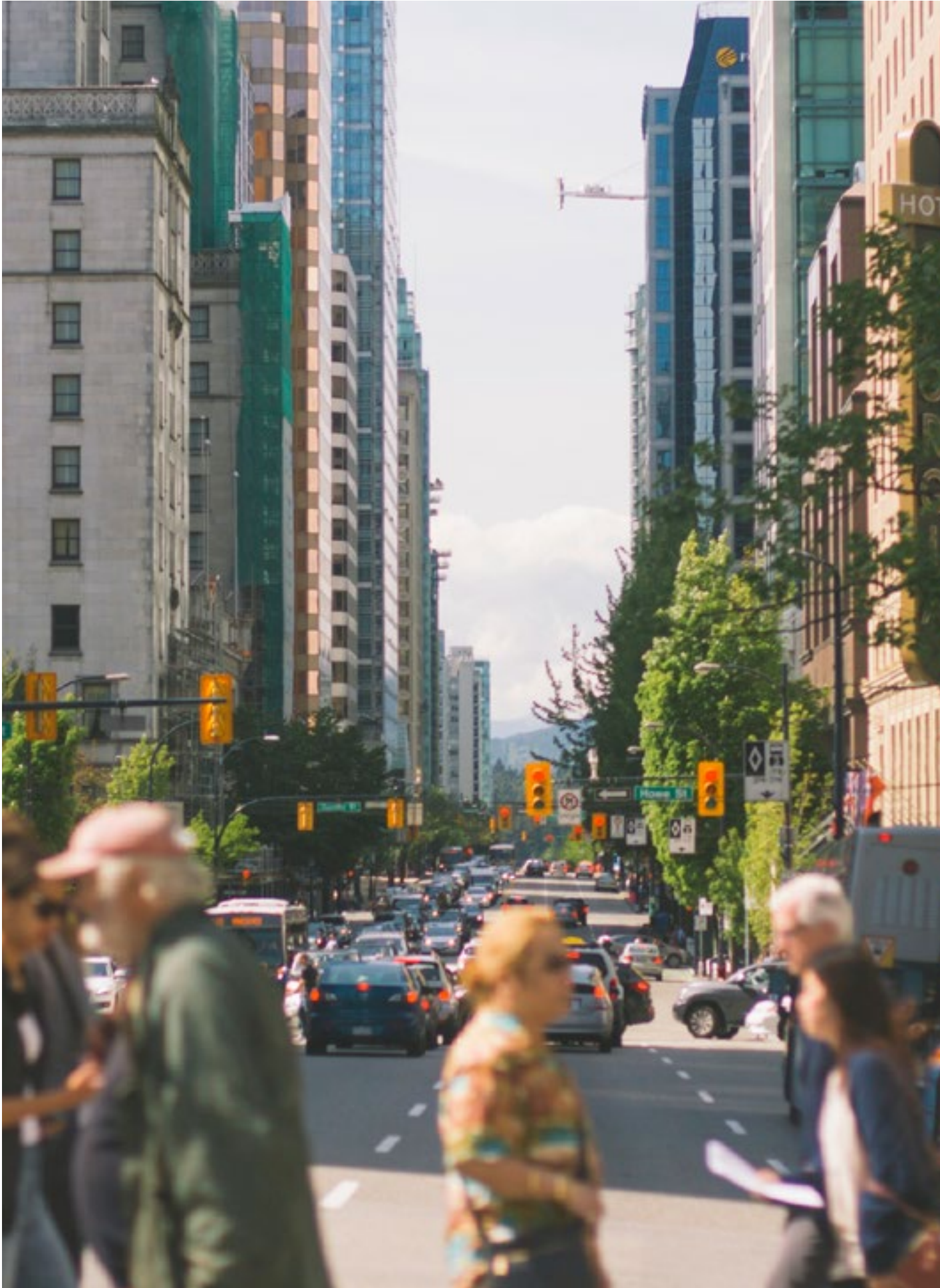
48%
GENERAL PUBLIC



“I’m optimistic in the sense that our generation is better at putting politics aside to solve issues together. We’ve come a long way on issues like LGBT legislation but not very far on climate, but I’m still hopeful because we’re a generation that looks for the facts and takes collective action.”

Hans, 27





PART THREE:

A Closer Look at Key Issues

At the unique intersection of social status, substance and style, Aspirationalists are aware of their impact on the environment while also being active participants in brands and the marketplace. As such, they have high expectations on brands to act in society's best interest.

Capitalism

Fueled by a global conversation about the role of capitalism in society and increasing focus on income inequality, brands are under pressure to show the marketplace can be a force for good in the world.

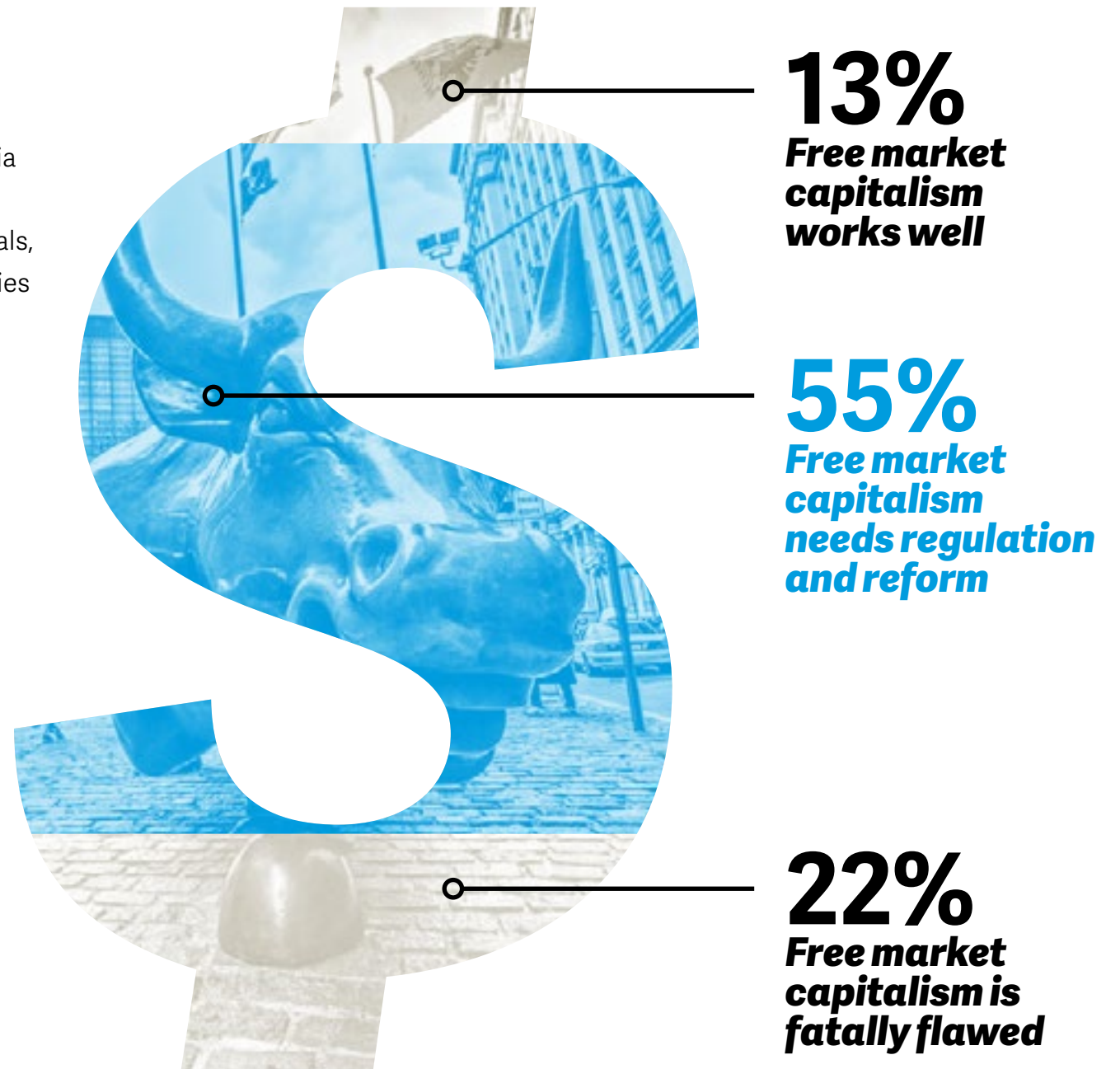
While Aspirationalists generally support free market capitalism, a majority believe that reforms and regulations are necessary to make it work.

Fifty-five percent of Aspirationalists believe that “free market capitalism has some problems, but these can be addressed through regulation and reform” (55% Advocates, 51% Global Public), compared to 22 percent who believe that “free market capitalism is fatally flawed, and a different economic system is needed” (25% Advocates, 22% Global Public). Only one-in-ten Aspirationalists (13%) say “free market capitalism works well and efforts to increase regulation will make it much less efficient” (12% Advocates, 13% Global Public).

Aspirationalists are also more likely to trust institutions across sectors to act in the best interests of society, including scientific and academic institutions (79% Aspirationalists, 74% Global Public), NGOs (67% Aspirationalists, 62% Global Public), large national companies (61% Aspirationalists, 56% Global Public), media (57% Aspirationalists, 51% Global Public), national governments (55% Aspirationalists, 50% Global Public) and global companies (55% Aspirationalists, 48% Global Public).

Balancing their belief in capitalism and trust in institutions with a desire for reforms, Aspirationalists see the marketplace as an important lever of positive change.

VIEWS ON CAPITALISM



Corporate Expectations

For decades, marketers created value by developing products and advertising campaigns that would deliver against a simple equation: what the product does for the consumer and how it makes them feel in a specific use occasion.

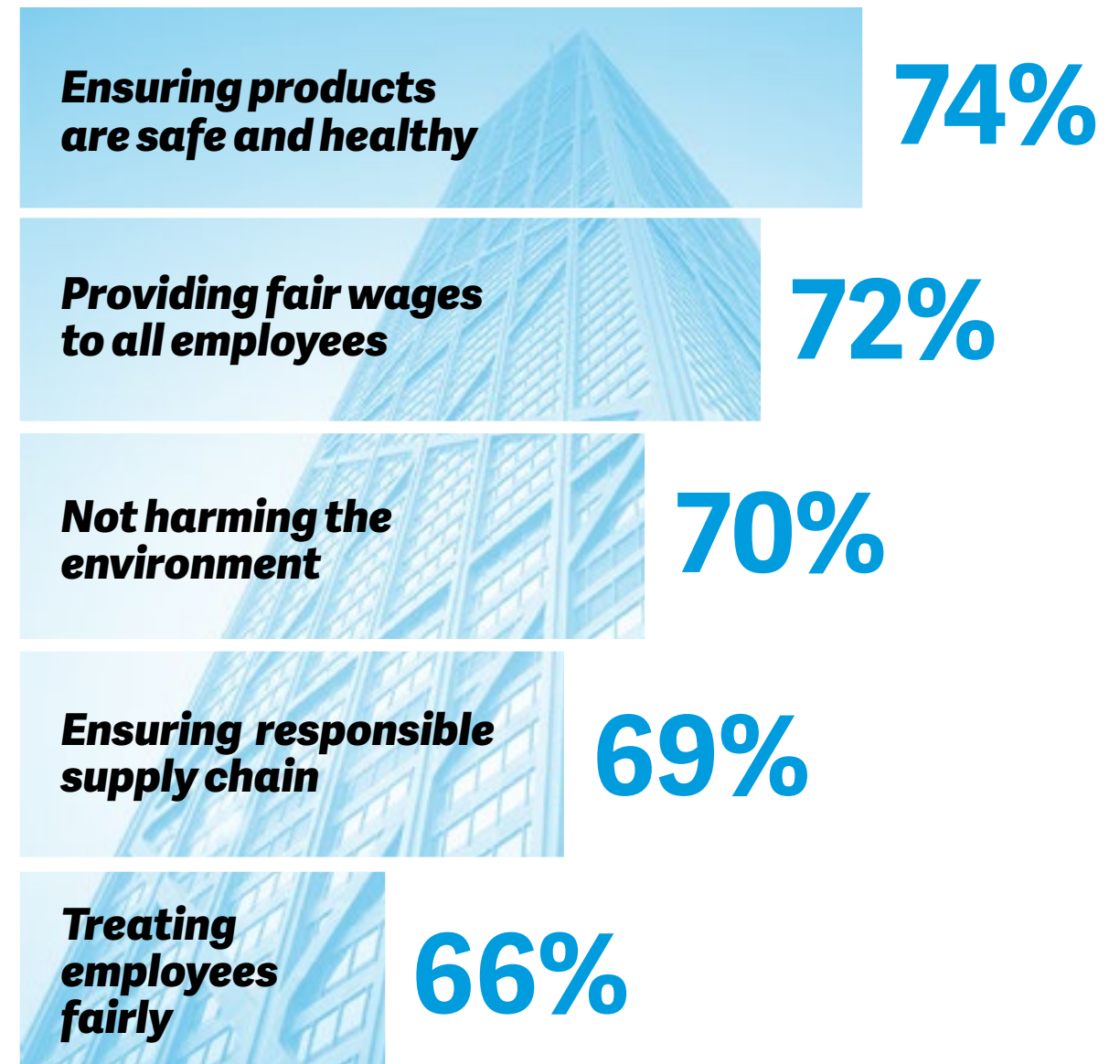
To remain relevant in the age of Aspirationals, however, brands must evolve how they create value by not only offering practical and emotional benefits, but also offering “societal and cultural benefits that deliver against deeper human needs and aspirations and help care for the wellbeing of consumers, family members, communities and the planet,” as Tom LaForge, the former Coca-Cola executive and cultural insights expert, has noted for years.

Aspirationals’ propensity for brand love and loyalty comes with new expectations for corporate purpose, responsibility and behavior. They expect brands to lead with their values and meet higher standards for health, safety, fairness and social impact in ways that drive progress for people and positive impact for the world. Like all consumers globally,

Aspirationals believe that companies should be held responsible for “ensuring products are safe and healthy” (74%), “providing fair wages to all employees” (72%), “not harming the environment” (70%), “ensuring a responsible supply chain” (69%), “treating employees fairly” (66%) and “providing quality products and services at the lowest price” (65%). Yet, Aspirationalists are more likely than the global public to expect that companies should “support charities and community projects” (60% Aspirationalists to 57% Global Public), “reduce human rights abuses” (56% to 54%), “help reduce the rich-poor gap” (55% to 52%) and “solve social problems” (53% to 49%).

In the context of shifting expectations, stand-alone products, services and CSR programs are no longer sufficient. Aspirationalists want brands to deliver more than functional and emotional benefits. They want brands to speak more holistically to their values, hopes and desires for their lives and for the world around them.

TOP EXPECTATIONS FOR ASPIRATIONALS



Top Issues

In 2015, global consumers are increasingly aware of their interdependent relationship with the environment. From access to clean water and fresh air to the depletion of natural resources to the impacts of extreme weather, environmental issues are now part of people's daily lives.

Indeed, nine-in-ten Aspirational consumers rank "pollution and the environment" as the most serious problem facing the world today (91%), followed by corruption (89%), extreme poverty (88%), human rights abuses (88%), terrorism (87%) and the gap between the rich and poor (87%).

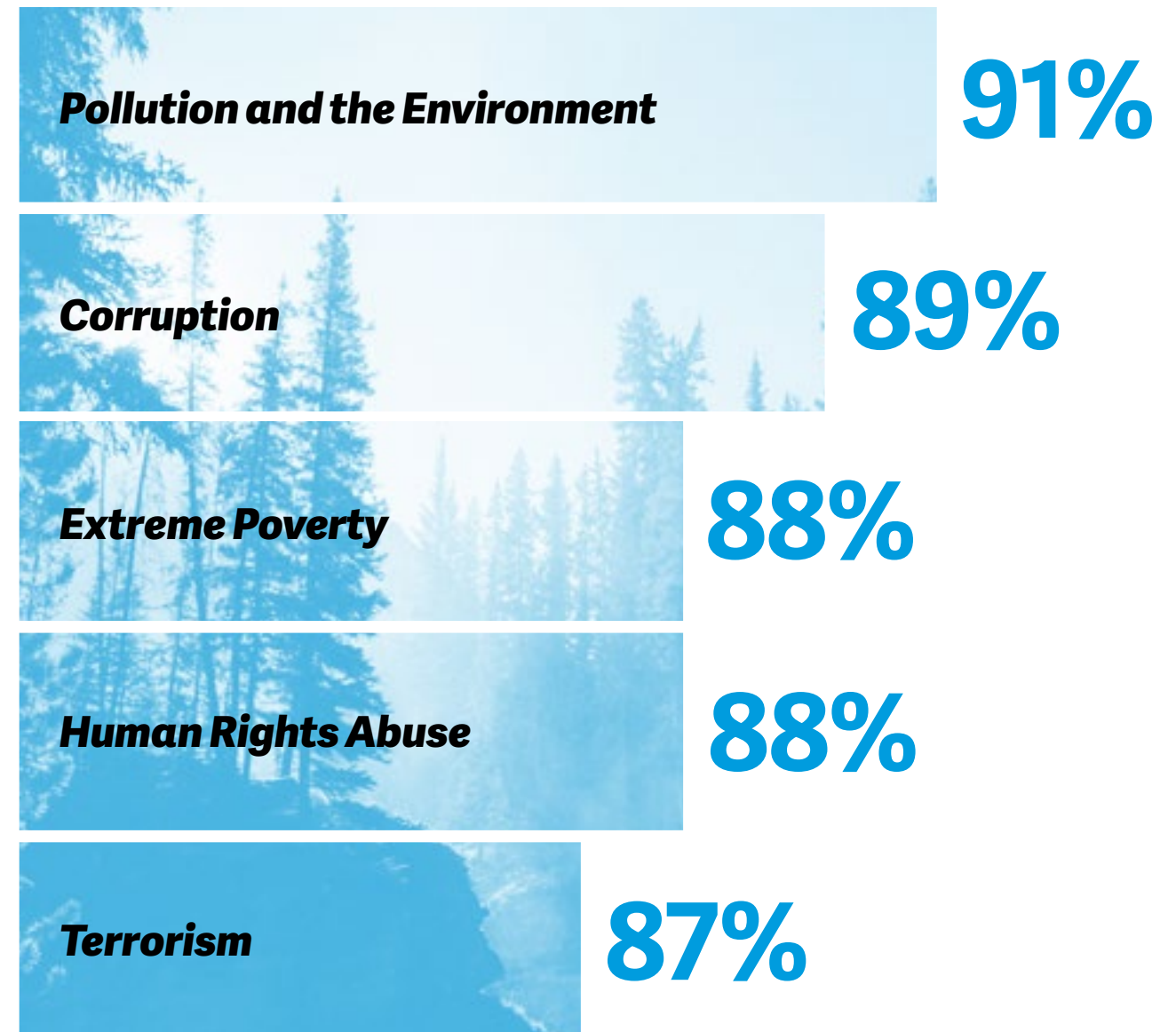
As a consequence of increased awareness of environmental concerns, nearly nine-in-ten Aspirationals (89%) believe that "it is necessary to take steps to reduce the impact of human activities thought to cause climate change," including 54 percent who say it is necessary to "take major steps very soon."

Aspirationals also believe that companies must play a role in addressing environmental concerns, with nearly seven-in-ten (70%) saying companies should be held responsible for "ensuring their products and operations do not harm the environment."

The complexity of environmental issues and impacts reveals an innate tension for Aspirationals, as they seek to balance their own needs and desires for consumption with the recognition that people and businesses alike must take positive action to reduce environmental harm.

In the face of this new reality, Aspirationals are looking to join forces with brands to be more responsible stewards of the planet together.

TOP ISSUES FOR ASPIRATIONALS





PART FOUR:

Five Aspirations That Hold the Future for Brands

We've identified Five Aspirations rooted in deep human needs and desires that define the identity, priorities and behaviors of this new generation of shoppers, workers, citizens and humans. These Aspirations point the way to the next frontier of marketing, design, innovation and the marketplace of the future.



1

Abundance Without Waste

MORE EXPERIENCES, FEWER RESOURCES



FIVE ASPIRATIONS:
Abundance Without Waste



Aspirationalists are redefining the idea of abundance, seeking more experiences in ways that use fewer resources and produce less waste. It's a shift from a scarcity mentality to a new reality where our creativity is an infinite resource. Aspirationalists are leading the way from an ownership economy to one driven by access, sharing and collaboration. Aspirationalists don't necessarily want more material possessions but rather, more meaningful experiences that help them live better.

FIVE ASPIRATIONS:
Abundance Without Waste



Pley




Le Tote



BAGGU: MAKES ME FEEL GOOD

"BAGGU makes me feel good because I reduce the amount of plastic bags that I use in stores. I'm able to carry around all the things that I purchase without having to waste on plastic. And I can keep using it, so it's good for the environment." **Melissa, 41**



In virtually every product category, brands are meeting this aspiration with new business models and delightful brand experiences.

From apparel to fitness to toys, brands are adopting subscription models to offer more access for consumers and an extended life for products. **Le Tote** is an apparel subscription service that delivers on-trend clothing and accessories to your door, allowing you to rent full outfits for as long as you want and return them when you're ready. **ClassPass** has a membership model that gives access to the largest

network of fitness studios in major American cities. Members may visit any studio in the network without having to be a member at every location. And **Pley** is a subscription program that delivers educational toys right to customers' doors. Parents can return the set in exchange for a new one whenever they want. Even DIY home improvement retailer **Home Depot** allows customers to rent traditionally big-ticket tools and trucks rather than buying equipment they will rarely use.

FIVE ASPIRATIONS:
Abundance Without Waste



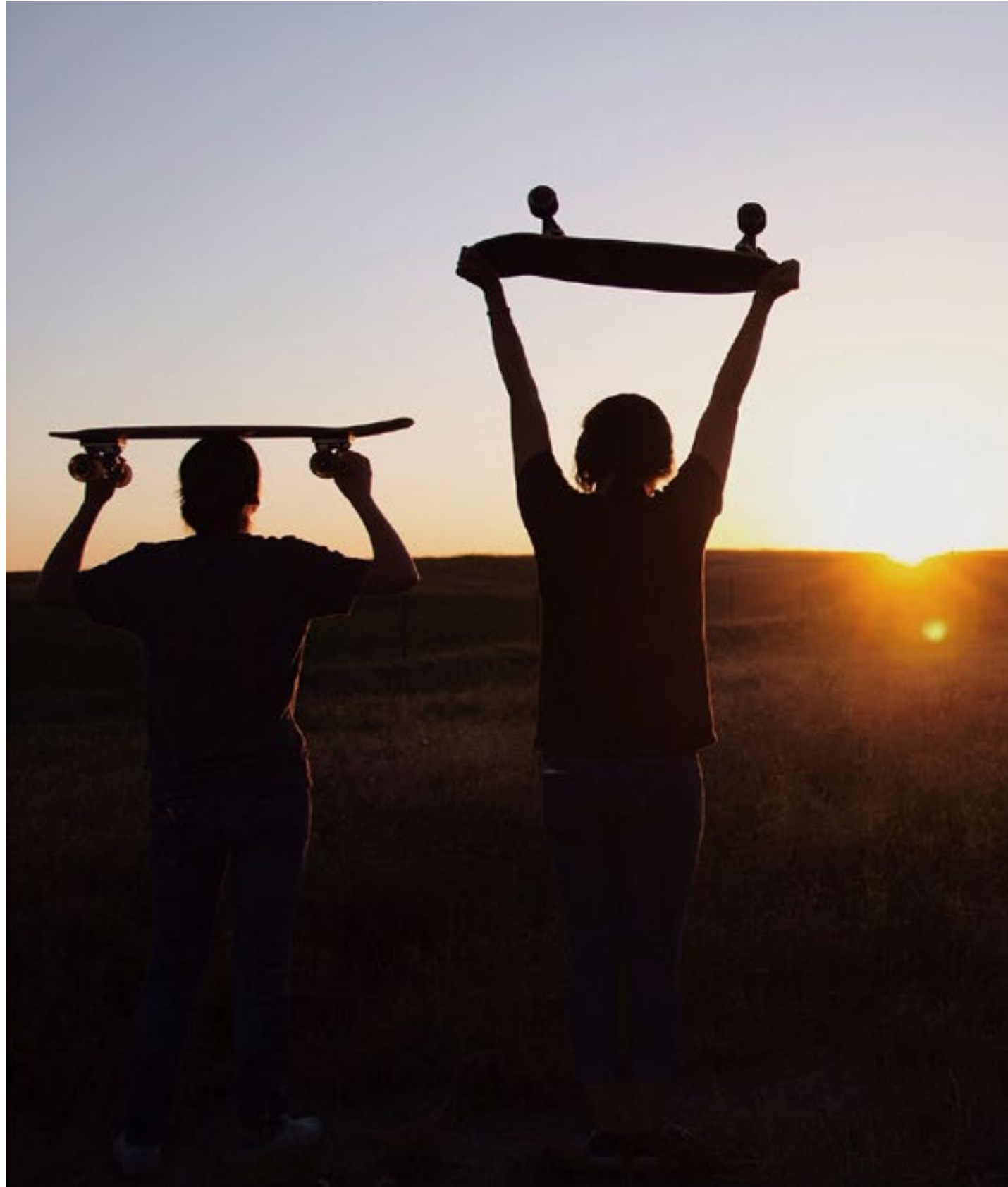
**NEW BALANCE: DURABLE
FOR ADVENTURES**

"I love adventure. I'm always seeking that rush of exploring new areas. New Balance shoes are durable. They last a long time and so they always go with me." **Thomas, 36**

Abundance Without Waste is not limited to the sharing economy. It's an aspiration that prizes quality, simplicity and creativity to get more out of what we already have. **Patagonia** embodies these values with *Worn Wear*, a documentary film and engagement platform encouraging people to think about the durability of what they buy and to repair, share or recycle their clothes so that the stories and experiences live on and on.

In the food category, French grocery retailer **Intermarche** created *Inglorious*

Fruits and Vegetables, a campaign to get shoppers to buy and appreciate produce that doesn't look perfect yet tastes just as good. Its funny advertisements, recipe tips and tasty samples drove a 24 percent increase in store visits. Similarly, **Hill & Szrok**, a London butcher by day specializing in British free-range organic meats, turns into a restaurant at night serving leftover cuts that weren't sold. Its approach reduces waste, attracts rave reviews from foodies and generates enough cash to pay for the area's expensive rent.



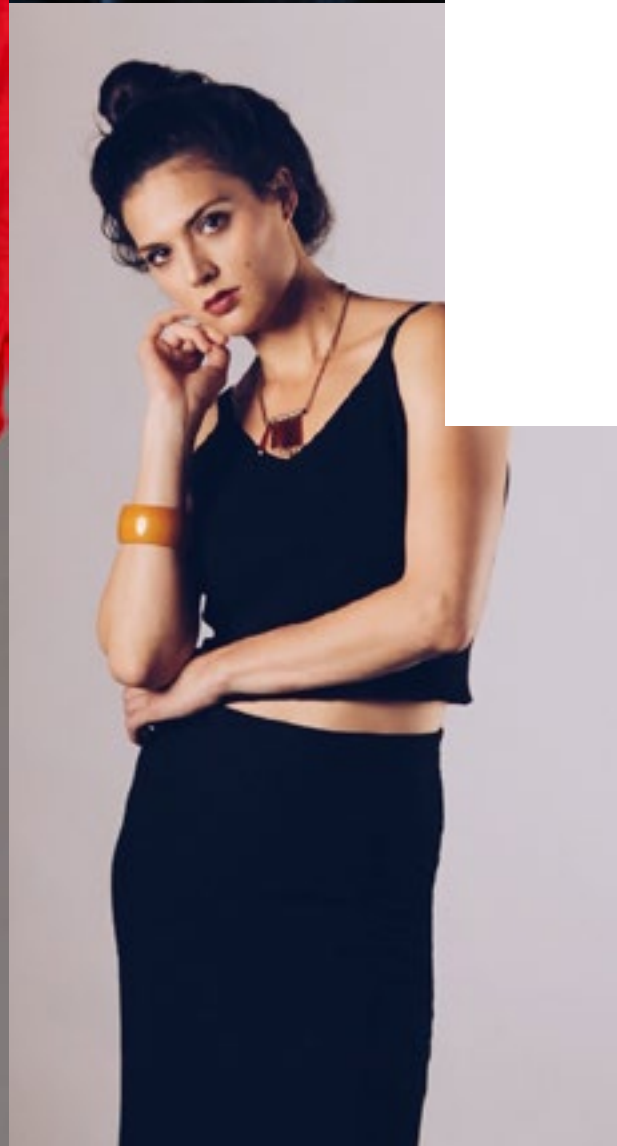
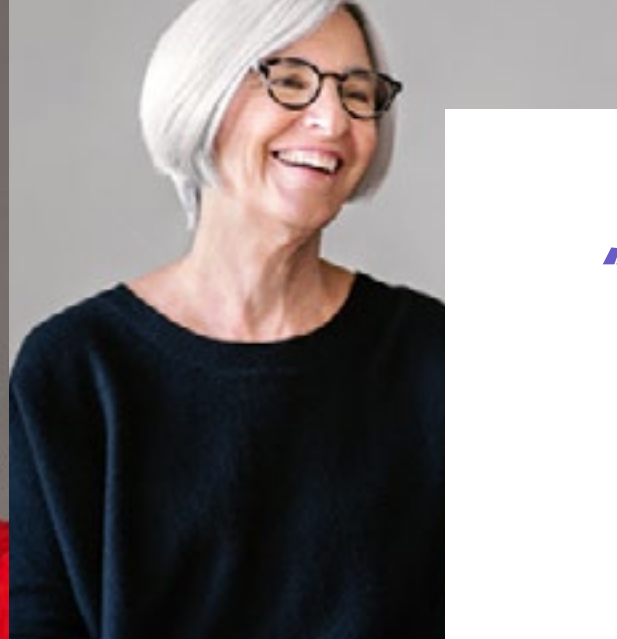
The Upshot

Brands can deliver on Abundance Without Waste by designing for quality, durability and ongoing resourcefulness while rewarding consumers who use, repurpose and recycle their products to get the most out of what they already have.

Winning brands will also embrace new business models that increase access to product benefits and enable meaningful experiences so consumers are free from the potential burdens of debt, clutter and stress that can accompany ownership.



WE'D
LIKE OUR
CLOTHES
BACK
NOW
THANKS
VERY
MUCH.



“We’ve never been about buying more. We’ve been about buying the right thing for you that will make your life simpler because we understand that you have better things to do than always be shopping for what to wear.”

Ann Gilligan
Director of Marketing at Eileen Fisher

Case Study: Eileen Fisher

Fashion pioneer Eileen Fisher founded her eponymous brand 30 years ago based on the design principles of simplicity, quality, versatility and durability. With exquisite fabrics, timeless cuts and endless combinations, the brand is challenging the very notion of fast fashion. The company’s take-back program, *Green Eileen*, reduces waste and expands access to Eileen Fisher’s signature clothing, so the love of fashion never has to end.

A person wearing a blue jacket is looking at produce in a grocery store. The produce includes potatoes and onions. A price tag for potatoes is visible, showing "\$49.95 per lb" and "Certified Organic".

2

Truly as You Are

WELCOMING IMPERFECTION
AS HONEST AND BEAUTIFUL

FIVE ASPIRATIONS:
Truly as You Are



The explosion of mobile technology and data has fueled new expectations for transparency and new dynamics of trust. The very fact that “the truth will out” is accepted by the Aspirational generation, and whether it plays out in their lives or in their expectations of brands, it’s no longer about perfection, but honesty.

FIVE ASPIRATIONS:
Truly as You Are



Everlane



Inside Amy Schumer, Comedy Central

AMY'S ORGANICS: NO WORRY ABOUT WHAT'S INSIDE

"The mission of Amy's Organics is family-safe food, so I can buy it and feed it to my child and not worry about what's inside. I can trust the back [of the package] without reading it. (But I still read it)."

Kelly, 32



Aspirationalists are leading the shift from flawless to honest, from hiding imperfections to revealing realities and from controlling the conversation to inviting others in to help solve challenges together.

The fearless fashion house **Everlane** is making radical transparency an essential part of its brand promise, providing detailed information and costs on every step of its manufacturing process and inviting customers to "know your factories, know your costs and always ask why."

Emmy® Award-winning comedian **Amy Schumer** inspired a phenomenon with her *No Makeup Challenge*, inviting fans to post selfies just as they are. Thousands answered her call. "I have been brought to tears with all the strong, badass, incredible women [who responded]," Schumer declared via Twitter. "We are all different and beautiful. Smile at yourself in the mirror, girl."

FIVE ASPIRATIONS:
Truly as You Are



Chipotle



Apple



EVERYDAY SHEA BUBBLE BATH:
SAFE FOR MY CHILD

"This Everyday Shea Bubble Bath is Fair Trade. No animal testing. Paraben free. No GMOs. Unrefined ingredients and it's unscented.

I bought it because it was actually safe as a bubble bath for my child."

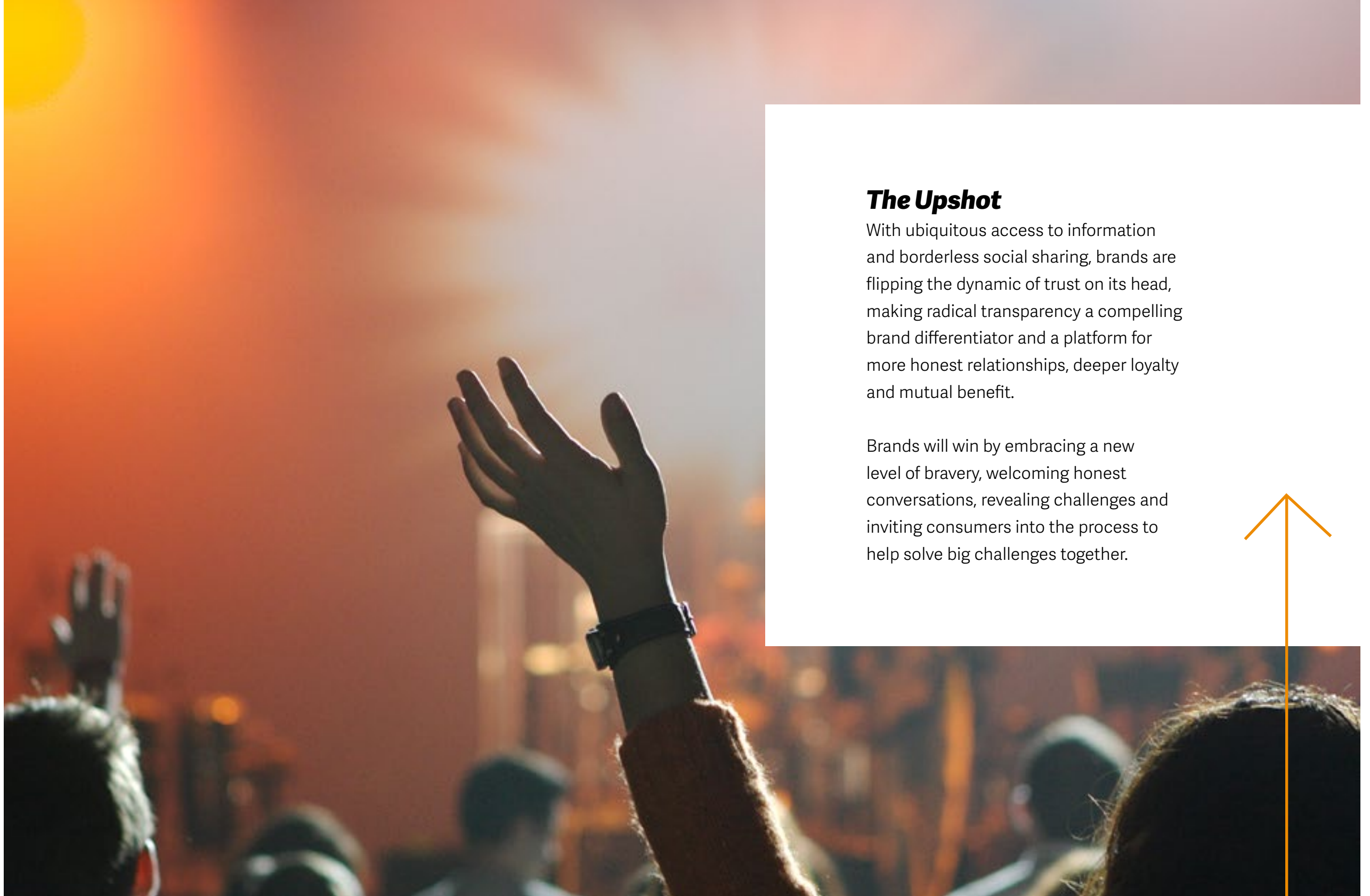
Karen, 30

Like few others, **Chipotle** has made sharing imperfections a badge of honor. The quick-serve chain has not only produced iconic films and a Hulu series highlighting the significant problems in the conventional food industry, it also recently suspended serving its popular carnitas in one-third of its restaurants when auditors revealed a supplier was violating the company's animal welfare standards. "Trust us, we're just as disappointed as you," in-store signage proclaimed. Now, the brand is reinventing its supply chain and bringing responsibly raised pork back to market.

Brands are also bringing consumers inside to solve challenges together. Tech companies like **Google** and **Apple** are

acting on the philosophy of "living in beta," inviting the public to test and improve new operating systems and platforms before they're ready for official release. Apple beta testers not only get a sneak peek of what's next, they also help improve the next generation of technology solutions.

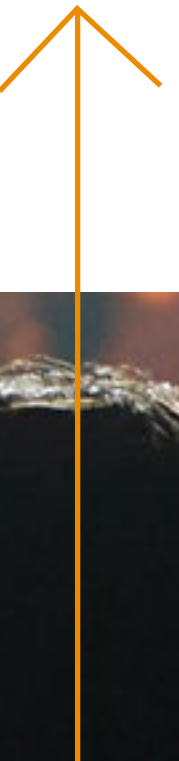
"Marketing will no longer be the department that puts lipstick on the gorilla. It needs to be about truth well told," says Steven Althuas, the Global Director of Brand Management and Marketing Services at **BMW**. "Brands need to be transparent about what they do. It's ok to fail as long as you learn from your mistakes."



The Upshot

With ubiquitous access to information and borderless social sharing, brands are flipping the dynamic of trust on its head, making radical transparency a compelling brand differentiator and a platform for more honest relationships, deeper loyalty and mutual benefit.

Brands will win by embracing a new level of bravery, welcoming honest conversations, revealing challenges and inviting consumers into the process to help solve big challenges together.





“The secret for us is having earnest conversations with our customers. We champion their desire for food that aligns with their values, so we make sure they have the right information to make informed purchasing decisions.”

Samantha Cabaluna
VP of Marketing & Communications at Earthbound Farm



Case Study: Earthbound Farm

Earthbound Farm knows that food tastes better when consumers know what’s in it, how it’s cultivated and who grows it. The brand’s commitment to transparency is embedded in every product with tracking technology that traces the entire life-cycle from seed to plate. By honoring its customers with authentic, honest food, the brand is inspiring trust that their purchases positively impact consumers, communities, employees, farmers and the planet.

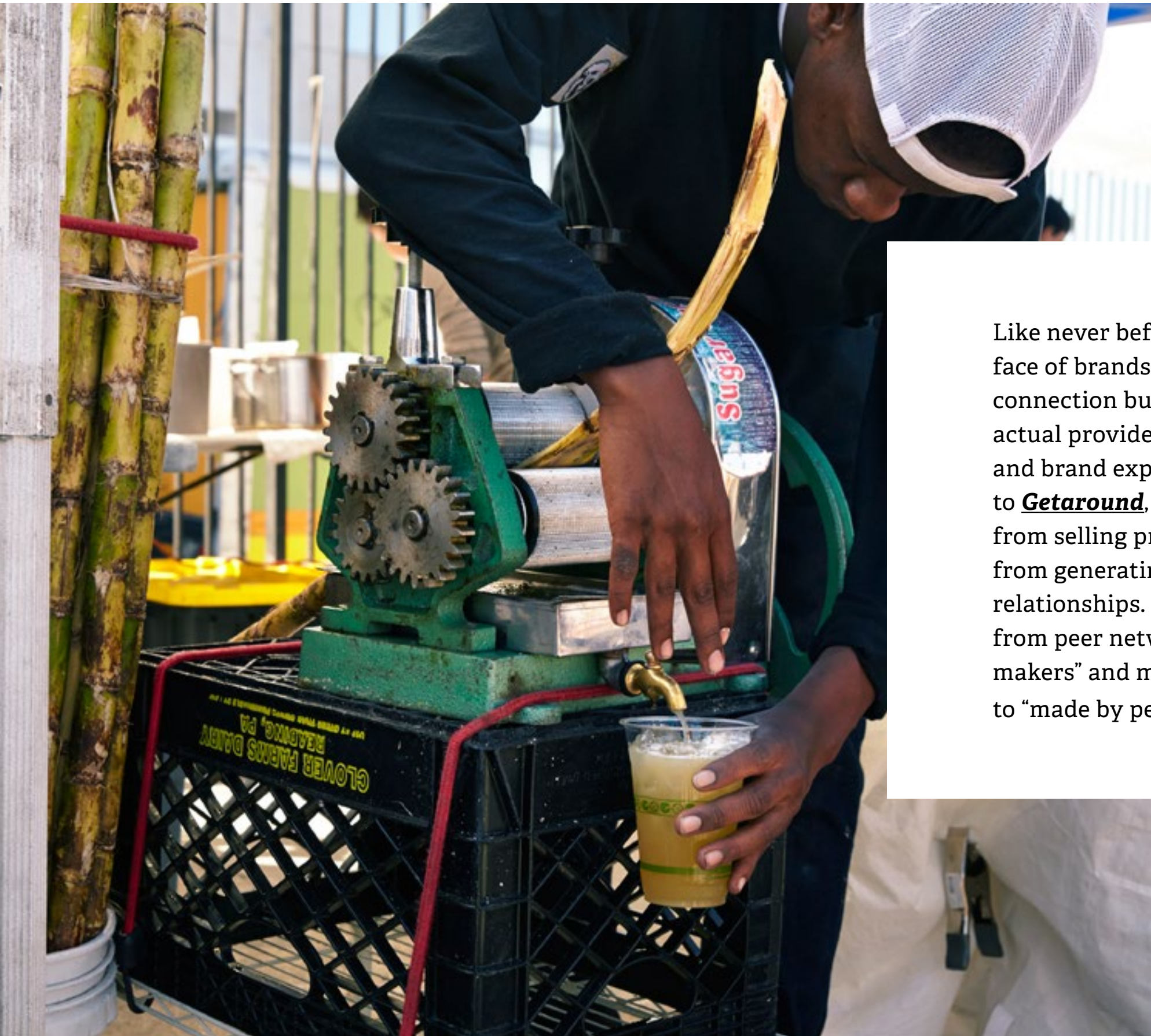
A person with dark hair and glasses, wearing a blue button-down shirt, is focused on working on a motorcycle. They are using a small black tool, possibly a soldering iron or a precision screwdriver, on a component of the bike. The background shows a workshop setting with various tools and parts of the motorcycle, including a prominent orange helmet hanging on a rack. The scene is lit with warm, natural light, creating a professional and hands-on atmosphere.

3

Get Closer

CONNECTING WITH THE PEOPLE
BEHIND THE BRAND PROMISE

FIVE ASPIRATIONS:
Get Closer



Like never before, peers have become the new face of brands. We've always desired human connection but today people like us are the actual providers of the products, services and brand experiences. From ***Airbnb*** to ***Uber*** to ***Getaround***, the marketplace is shifting from selling products to engaging peers and from generating transactions to building relationships. Increasingly, we're purchasing from peer networks, seeking to "meet the makers" and moving from "made by machines" to "made by people."

FIVE ASPIRATIONS:
Get Closer



American Express



West Elm Local



Hiut Denim



**STAINLESS STEEL RAZOR:
ARTISAN MADE,
DOMESTICALLY SOURCED**

“What I really appreciate about my stainless steel razor is the level of entrepreneurship. It’s small, artisan made and domestically sourced. I definitely paid more because of those qualities.” **Richard, 37**

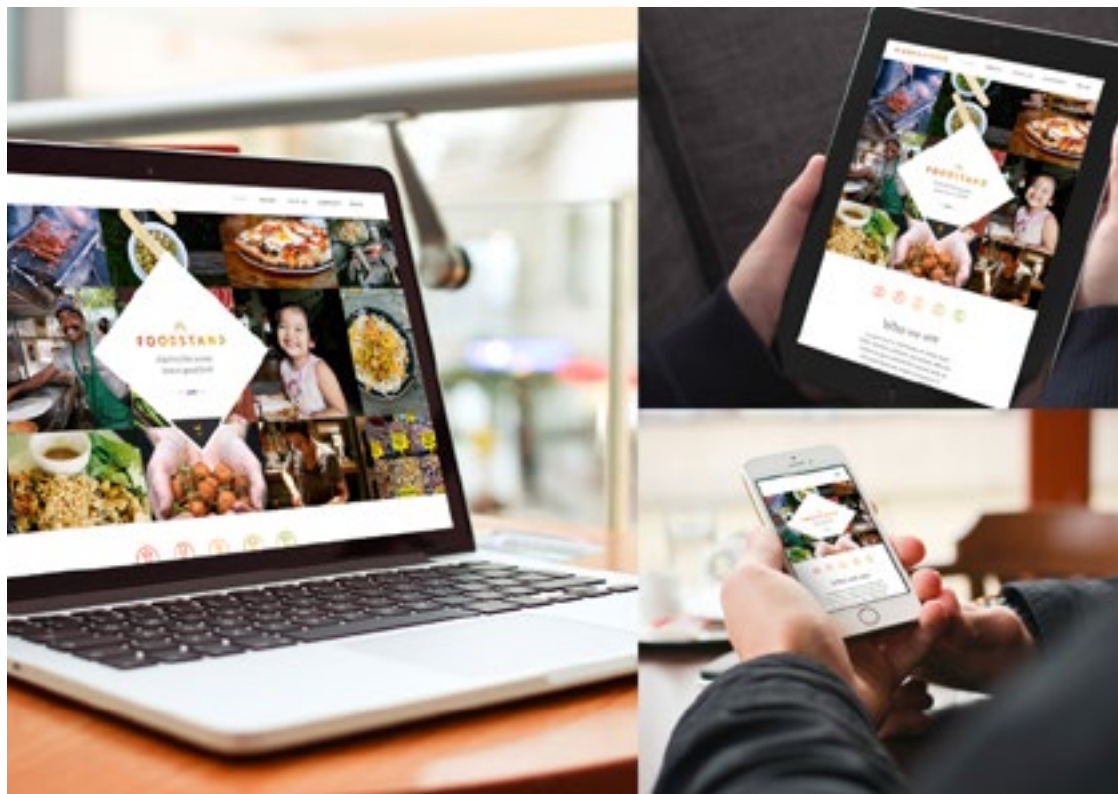


From global enterprises to local startups, brands are embracing the power of the human story. **American Express** is championing local businesses with its *Small Business Saturday* campaign, while **West Elm Local** is helping consumers get closer to the people behind its products by sourcing locally-made furniture in its retail outlets and working with Etsy to connect, support and empower the artisans in our own backyards.

In the Welsh town of Cardigan, **Hiut Denim** is fueling a renaissance after the town’s biggest employer, a jeans factory, moved operations offshore. Today, the company is producing organic cotton and raw selvedge jeans with each artisan involved in the process signing his or her name inside every pair.

FIVE ASPIRATIONS: *Get Closer*

Makerbot Thingiverse



Food Stand



APPLE: BRINGING THE WORLD CLOSER TOGETHER

"Apple's philosophy is to celebrate the unique experiences and skills that we all bring to the table. It's about bringing the world closer together. Uniting us through technology, art and creativity."

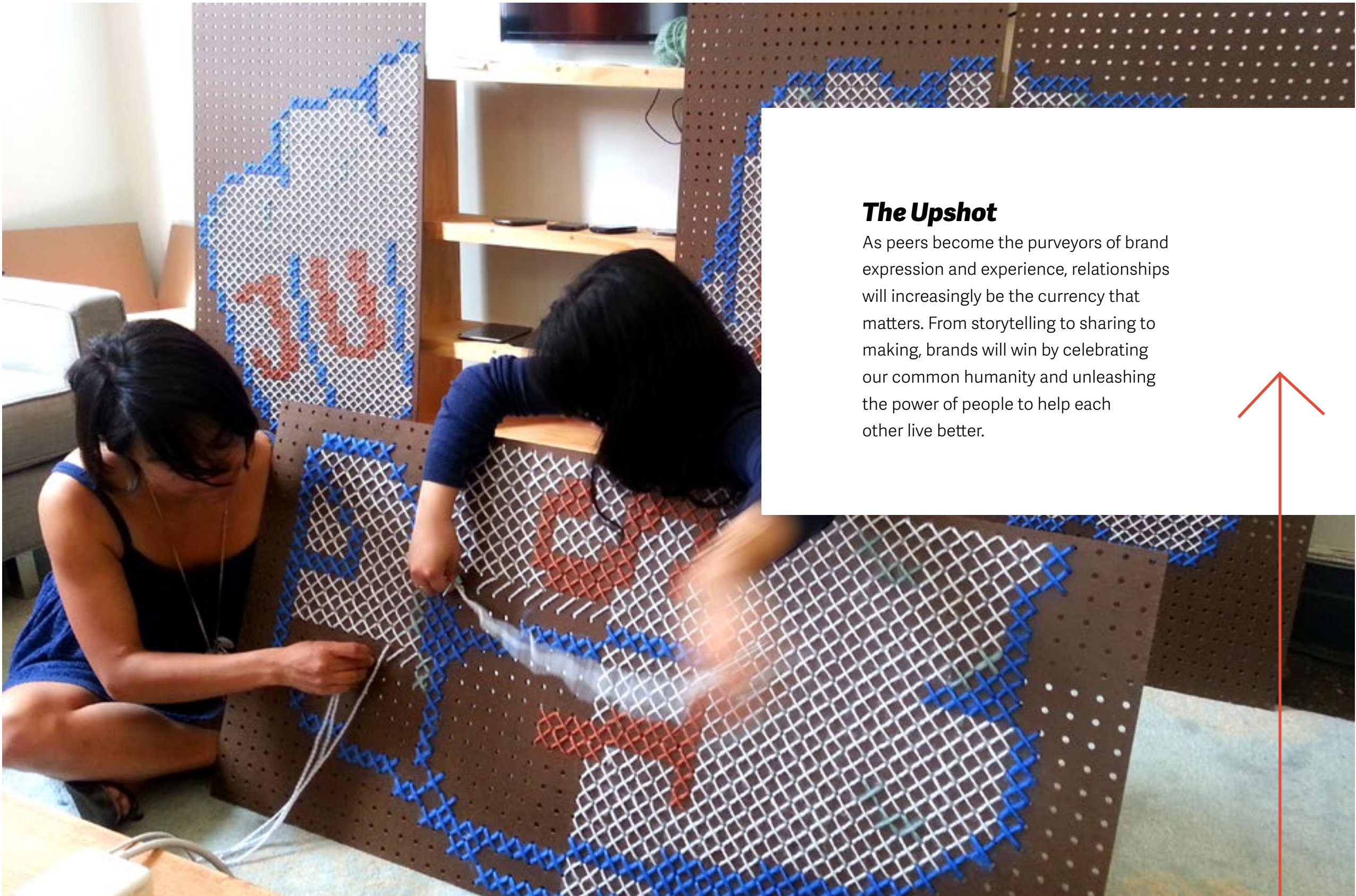
Daniel, 31

And increasingly, technology is bringing people closer together and empowering human-centric design, manufacturing and commerce. **Makerbot Thingiverse** is inspiring collaborative design and access to local 3-D printing, while the mobile platform **Food Stand** is bringing food lovers of all kinds together to share recipes, products and tips, taking the mystery out of good food and elevating the story behind every meal.

From home studios to food trucks to community markets and festivals, platforms like **PayPal**, **Square** and **Venmo** are enabling a new world of peer-to-peer commerce where *People Rule*.

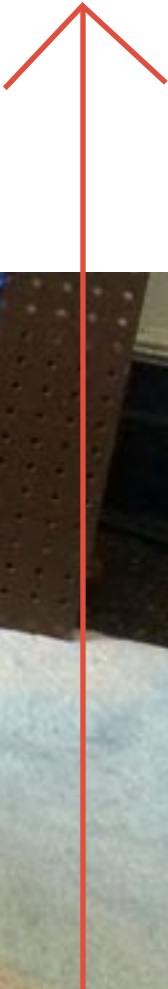
"People want a genuine connection with the brands in their lives," says Scott Novak, Senior Vice President of Communications and Brand Development at **Time Inc.** "They want brands to move from an 'us and them' society to a 'we' society. Looking forward, that's not going to change."

FIVE ASPIRATIONS:
Get Closer



The Upshot

As peers become the purveyors of brand expression and experience, relationships will increasingly be the currency that matters. From storytelling to sharing to making, brands will win by celebrating our common humanity and unleashing the power of people to help each other live better.





“Brands are realizing they need to be people-centric and heavily empathetic. At Etsy, our community leads and our brand follows. Business opportunities come from understanding people’s problems, rather than just finding white space.”

Randy Hunt
VP of Design at Etsy



Case Study: Etsy

Guided by a vision of bringing humanity to commerce, Etsy is a global marketplace of makers and buyers where entrepreneurs can find meaningful work and thoughtful consumers can discover and build relationships with the people behind the products they buy. The platform has brought together 1.5 million sellers, 21.7 million active buyers and more than 32 million items for sale grossing \$1.93 billion in 2014 alone.

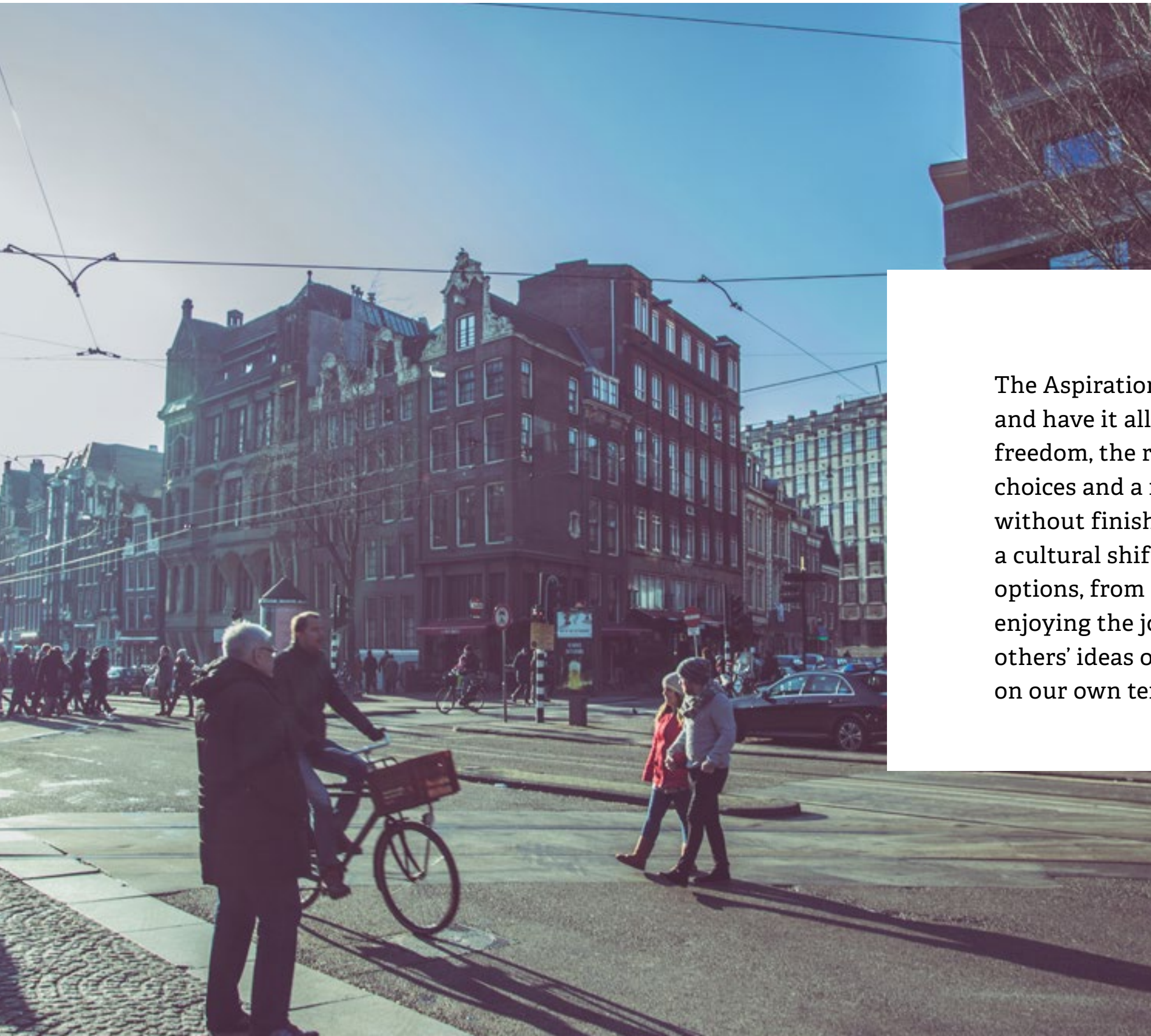


4

All of It

EXPERIENCING FREEDOM BEYOND
BINARIES AND FINISH LINES

FIVE ASPIRATIONS:
All of It



The Aspirational generation wants to be, do and have it all. Rooted in a deep desire for freedom, the rejection of limiting binary choices and a reimagination of progress without finish lines, Aspirationals are fueling a cultural shift from fixed answers to fluid options, from having a clear destination to enjoying the journey and from reacting to others' ideas of success to seeking happiness on our own terms.

FIVE ASPIRATIONS:
All of It



Urban Outfitters - Without Walls



Selfridges & Co - Agender



Wildfang



**FREELANCE MAKEUP ARTIST:
DOING SOMETHING I LOVE**

"I've always wanted to be a freelance makeup artist. Last year, I started a Facebook page, Instagram page and YouTube page. And just by using those networks, I was able to book a wedding with people I didn't even know. It felt really good putting myself out there and doing something I love." **Vanessa, 27**



Shifting the paradigm from fixed to fluid means refusing to be trapped by predetermined categories like age, gender or yesterday's expectations. Tapping this new reality, **Urban Outfitters** has created *Without Walls*, a new brand and curated collection that takes you from morning workout to the workplace to an evening with friends, living seamlessly through the roles, opportunities and adventures that each day brings.

Similarly, UK retailer **Selfridges & Co.** recently launched *Agender*, a brand platform dedicated to "shifting gender boundaries through ground-breaking fashion, music and design collaborations," while two former Nike executives have created **Wildfang**, a brand for "modern day, female Robin Hoods raiding men's closets."

FIVE ASPIRATIONS:
All of It

Gap Kids X ED



WeWork



UNDER ARMOUR: STAND
OUT IN THE CROWD

Under Armour doesn't try to be like other companies. They like to stand out in the crowd, which I love. They're true to their core values and they stick to them. They're not going to sell out."

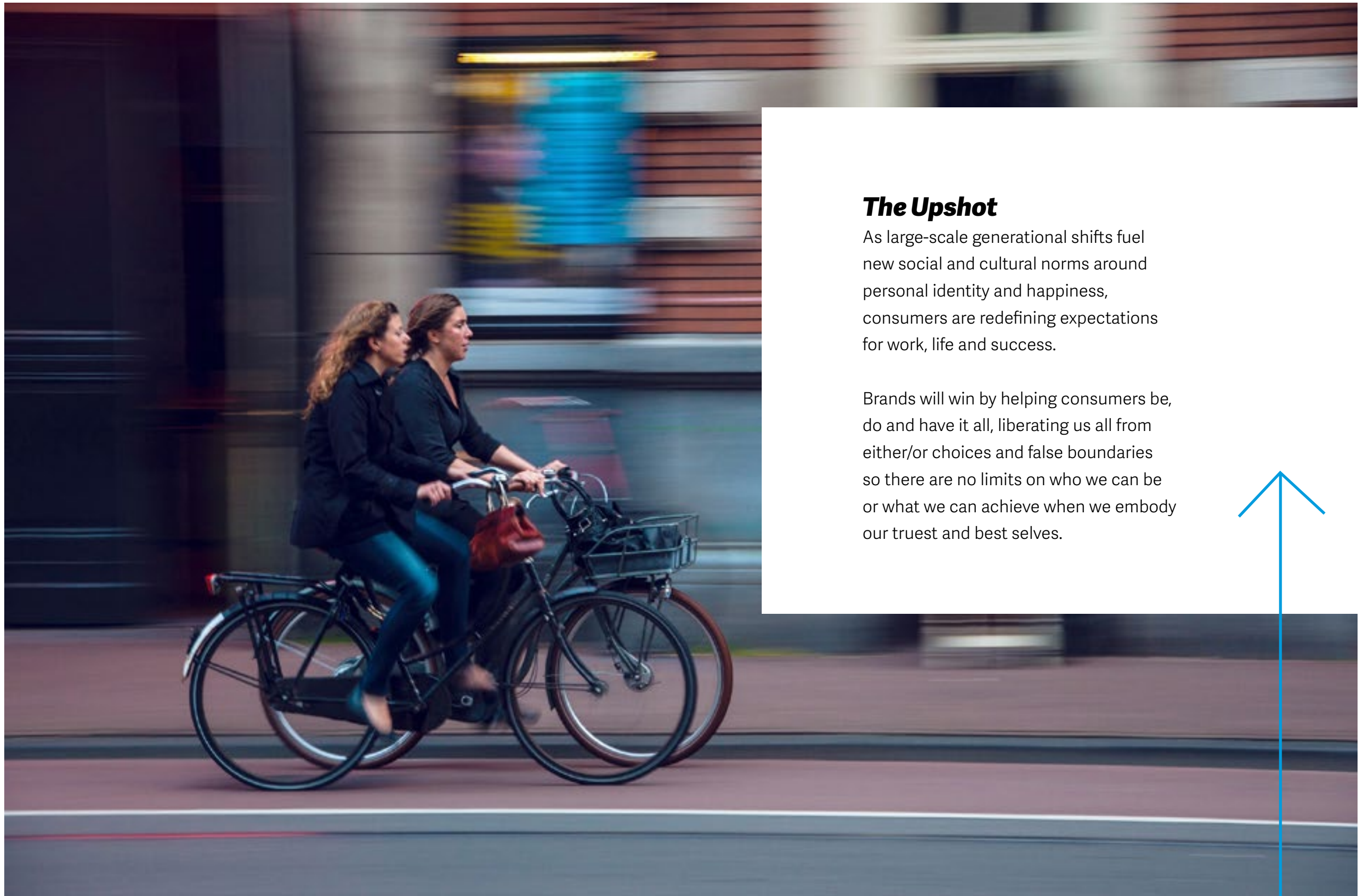
AJ, 38

And, brandishing slogans like "Strong. Brave. Fearless. Creative." and "Be Your Own Hero," **Gap Inc.** teamed up with Ellen Degeneres to launch *Gap Kids X ED*, a clothing line dedicated to supporting girls "whether they skateboard or dance, wear dresses or jeans, build forts or paint rainbows, or everything in between."

The desire for All of It signals a bold and brave new world where work is fun, treats are healthy and brands help us experience the best of life and realize our best selves. Online retailer **Zappos** is pioneering "holonomics," a new way of doing business whereby workers manage

themselves, transforming their roles from rules-driven employees to self-empowered entrepreneurs with no job titles, no bosses and no limits.

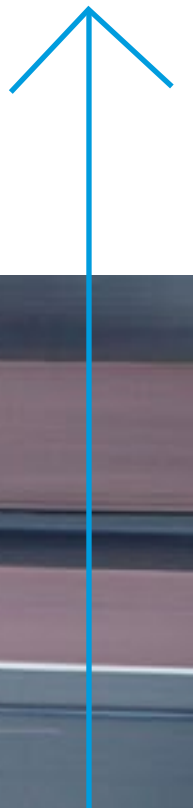
And in cities from Los Angeles to London to Amsterdam and Tel Aviv, coworking spaces like **WeWork** are shaping a global community of creators and a new culture of work where freelancers, startups, small businesses and remote teams are invited to re-imagine the nine-to-five workday and be "bold," "scrappy," "inventive" and "do what you love."



The Upshot

As large-scale generational shifts fuel new social and cultural norms around personal identity and happiness, consumers are redefining expectations for work, life and success.

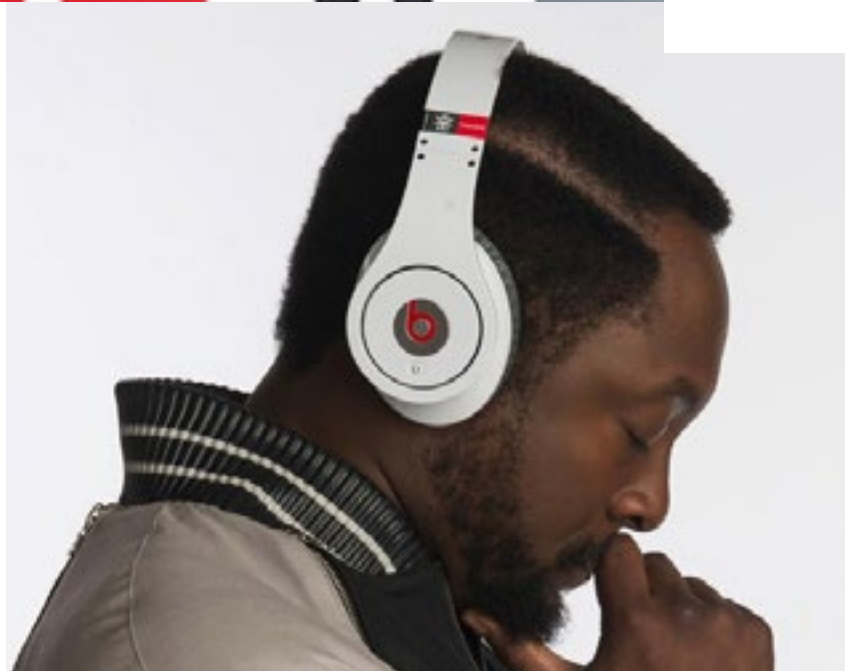
Brands will win by helping consumers be, do and have it all, liberating us all from either/or choices and false boundaries so there are no limits on who we can be or what we can achieve when we embody our truest and best selves.





“I came off stage with the Black Eyed Peas in Costa Rica and saw the aftermath that I was part of: waste everywhere.... with Ekocycle we are on a mission to make better stuff cool and cool stuff better.”

will.i.am
Founder of Ekocycle



Case Study: Ekocycle

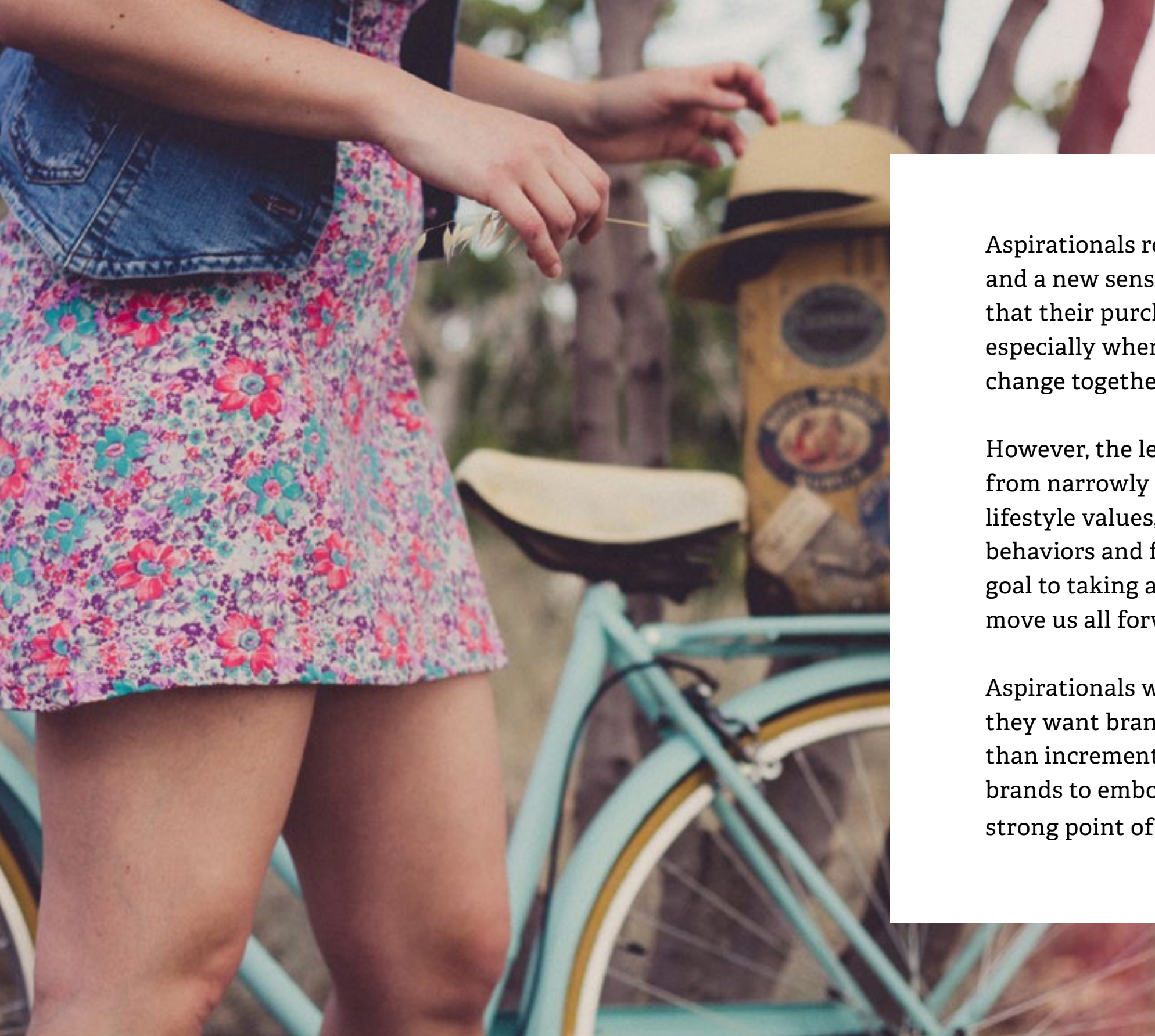
An iconic pop star, a global beverage company and a radically refreshing attitude toward consumer packaged goods. Ekocycle is a joint effort between will.i.am and The Coca-Cola Company to inspire new things made in part by recycled materials. By doing so, the brand frees style-savvy shoppers from trade-offs between style and sustainability. Ekocycle empowers consumers to truly have all of it, be all of it and do all of it with zero waste and unlimited style.

A woman with long brown hair, wearing a dark grey fedora hat and a light-colored, long-sleeved top, is looking down on a wooden deck. The background is a blurred outdoor setting with green foliage and a wooden fence. The scene is brightly lit, suggesting a sunny day.

5

Do Some Good

AGENCY AND IMPACT
IN THE EVERYDAY



Aspirationals represent a refreshing optimism and a new sense of agency born from the belief that their purchases, votes and actions matter, especially when joining with others to create change together.

However, the lens for social impact is shifting from narrowly defined political issues to broad lifestyle values, from bold stands to everyday behaviors and from rallying for some distant goal to taking action today in ways that help move us all forward.

Aspirationals want something to believe in and they want brands to stand for something bigger than incremental product benefits. They want brands to embody an inspiring ethos, to bring a strong point of view and put a flag in the ground.

FIVE ASPIRATIONS:
Do Some Good



KIND



PepsiCo Transform Your Patch

**TOMS: NOT ONLY DO THEY DONATE,
BUT THEIR SHOES ARE CUTE**

"I like TOMS because I want to help others in need. I know that there are children out there that can't even afford to buy a pair of shoes. I also want to remind my children that there are others who need something as simple as a pair of shoes. It's nice because not only do they donate, but their shoes are cute." **Karen, 30**



Inspired by pioneering social brands like **TOMS** and **Warby Parker**, **Target** is delivering on the desire to do some good with *Made To Matter*, a handpicked collection of 31 brands that are better for your health and give back to the community. This new tribe of brands, including **Method**, **Happy Family** and **KIND**, is projected to generate \$1 billion in sales for Target this year.

In the UK, **PepsiCo** launched *Transform Your Patch*, a campaign to regenerate outdoor spaces in partnership with the environmental charity Groundwork. With the purchase of every drink, the company is restoring a one square centimeter patch of parks, playgrounds and football pitches throughout the country.

FIVE ASPIRATIONS:
Do Some Good

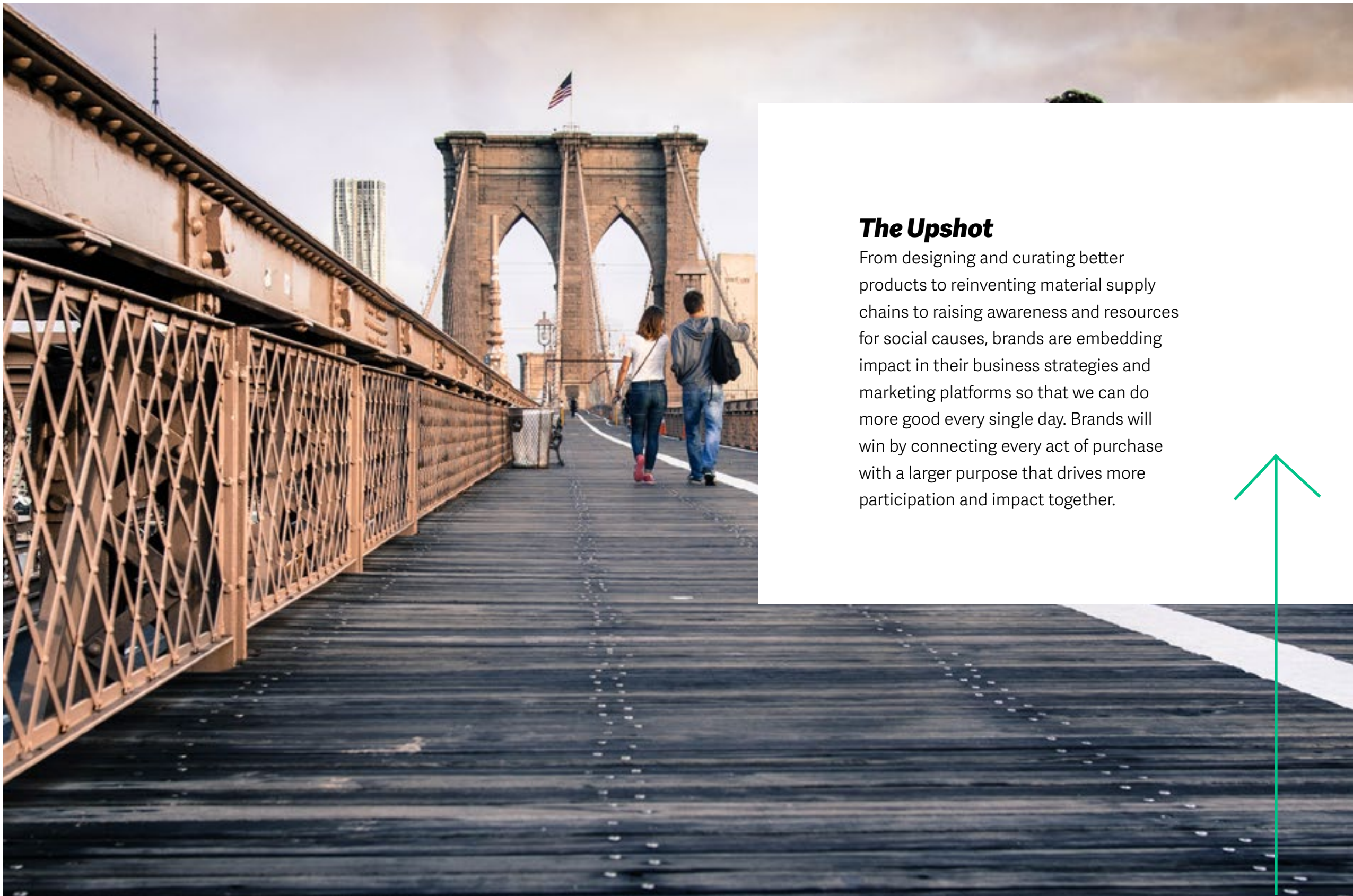


And **Intel** is raising the bar on standards for sourcing raw materials, setting the ambitious (and complicated) goal of only manufacturing conflict-free microprocessors. The move requires the reinvention of their supply chain so no minerals come from mines involved in human rights abuses and armed conflict in the Democratic Republic of Congo.

Across sectors, geographies and categories, brands are infusing purchase with social purpose and embedding positive change in their very reason

for being. Underwear brand **Thinx** is on a mission to break the taboo around menstruation for women in developing countries, while **This Bar Saves Lives** donates its nutrient-rich snacks to severely malnourished families through their partnership with Save the Children. And in the far reaches of the Zambian bush, **Mulberry Mongoose** offers jewelry made using snare wire that's collected during anti-poaching patrols to help save the lives of lions, leopards, elephants and wild dogs with every purchase.

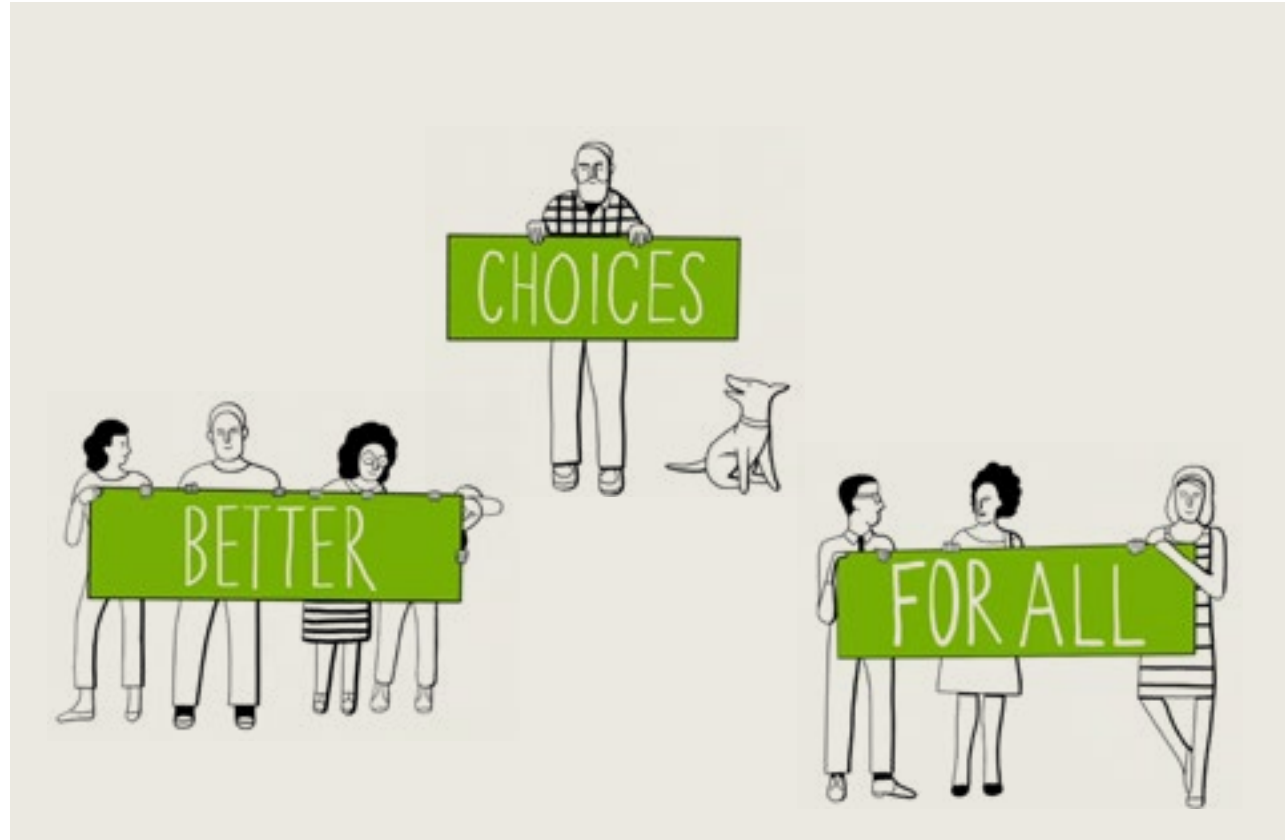
FIVE ASPIRATIONS:
Do Some Good



The Upshot

From designing and curating better products to reinventing material supply chains to raising awareness and resources for social causes, brands are embedding impact in their business strategies and marketing platforms so that we can do more good every single day. Brands will win by connecting every act of purchase with a larger purpose that drives more participation and impact together.





“Our guests are looking for products they can feel good bringing home without sacrificing price and performance. We’re taking the guesswork out of buying better-for-you products by bringing together trusted brands.”

Kathee Tesija
Executive VP, Merchandising & Supply Chain at Target

Case Study: Target

Made to Matter, Handpicked by Target is a curated collection of better-for-you products and includes brands like Annie’s, Plum Organics, Method, Stonyfield and Seventh Generation. To be selected for the collection, brands have to support all three pillars of the *Made to Matter* program—foster unique collaborative partnerships, develop exclusive innovations and be committed to social responsibility. Every purchase of a *Made to Matter* brand is an opportunity do more good for consumers, communities and the planet. The collection is projected to see sales hit \$1 billion in 2015.



Takeaways

These Five Human Aspirations represent a profound cultural shift in the marketplace and a tremendous opportunity for brands.

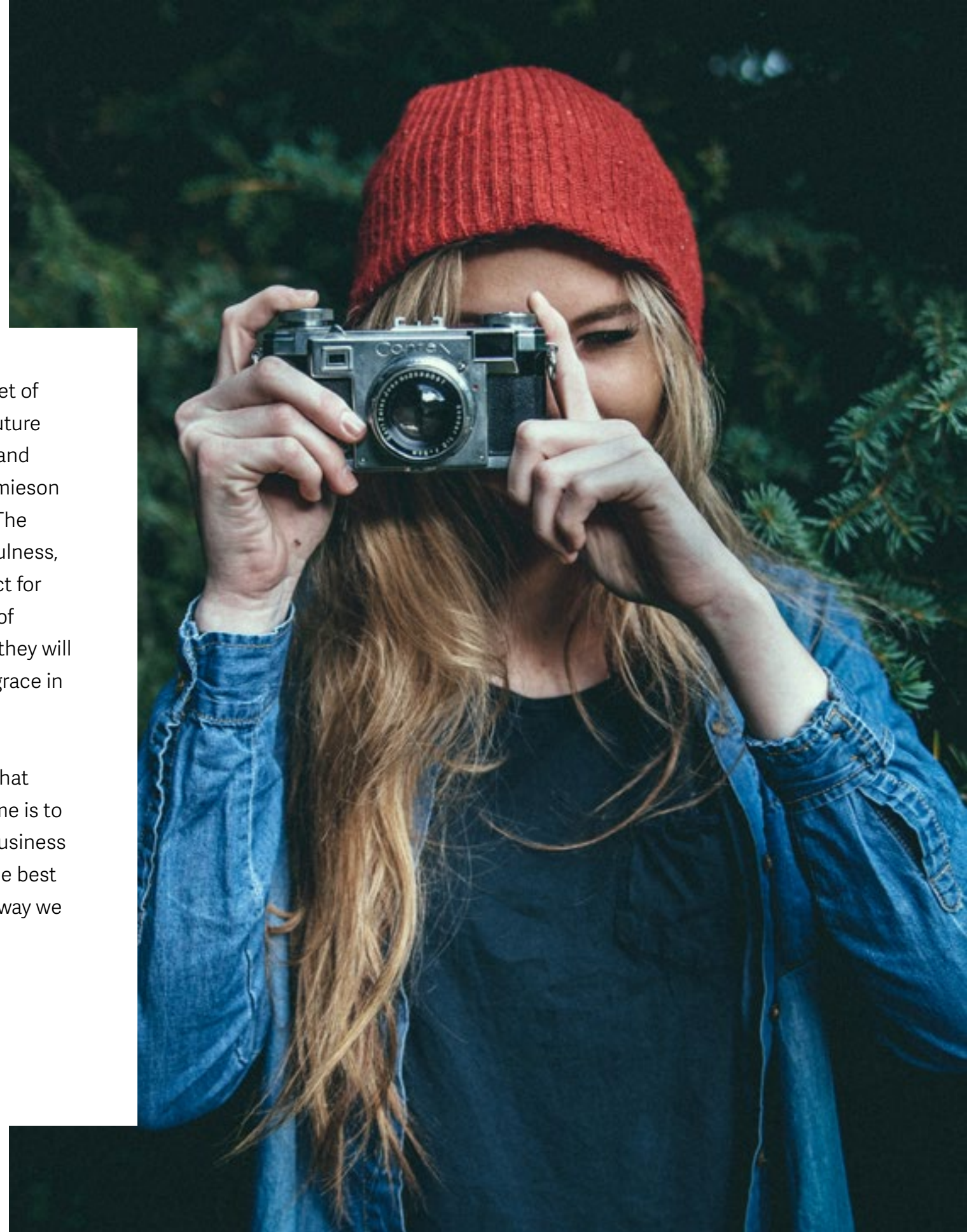
It's no longer about asking consumers to buy something. It's about inspiring them to be something by helping us reveal our best selves and realize a better world.

It means honoring, respecting and engaging not just consumers, but human beings based on the deeper needs, hopes and aspirations that define who we are and what we want to be.

And it's about embodying a new set of cultural values that can shape a future with unprecedented possibilities and constraints. As Professor Dale Jamieson at New York University explains, "The virtues of cooperativeness, mindfulness, simplicity, temperance and respect for nature will not solve the problem of climate change on their own, but they will help us to live with meaning and grace in the world that we are creating."

At the end of the day, we believe that the greatest opportunity of our time is to leverage the power and scale of business to serve humanity, and harness the best of our humanity to reimagine the way we do business.

A new generation of Aspirationalists is leading the way.





How Can Aspirationals Help Build Relevance and Resilience for Your Brand?

The rise of the Aspirationals represents a fundamental shift in culture as the values, needs and priorities of a new generation move toward authenticity, wellbeing, sustainability and social purpose.

Since we began tracking Aspirationals globally in 2012, we've helped organizations across industries and sectors to reimagine brand purpose, products and experiences by uniting the cool thing with the right thing.

Leveraging the reach and influence of Aspirationals can help brand leaders and marketers drive relevance, sales, loyalty and positive impact for business and society. By using Aspirationals as a lens for brand strategy, design and marketing, organizations can:

- Build brand loyalty in a fickle market
- Grow market share in a crowded industry
- Lead as new entrants enter the category
- Win with consumers who shop based on value and values
- Inspire and engage employees to be their best

To explore how Aspirationals can help drive new growth for your brand, email Raphael Bemporad at [**rbemporad@bbmg.com**](mailto:rbemporad@bbmg.com), Mitch Baranowski at [**mbaranowski@bbmg.com**](mailto:mbaranowski@bbmg.com), or Chris Coulter at [**chris.coulter@globescan.com**](mailto:chris.coulter@globescan.com).

Credits

CONTRIBUTORS:

Raphael Bemporad
Mitch Baranowski
Grant Griglak
Amanda Yogendran
Daianna Karaian
Eric Whan
Chris Coulter
Abbie Curtis
Perrine Bouhana

DESIGN:

Jess Oswald
Kristin Power
Andrea Franz

PHOTO CREDITS:

Cover, Vincent Laforet
pg. 23, Billie Ward, "Blonde,
Boots, Leather Leggings"
pg. 39, Callender, "Just Ship'
Etsy Hack Week Cross Stitch"

BACKGROUND AND METHODOLOGY

The Aspirational consumer segmentation explores the intersection of consumer values, motivations and shopping behaviors with sustainability and social purpose.

Aspirationals 2015 data are based on GlobeScan's annual Radar survey of the global public, which is a research program that draws upon GlobeScan's unique database of nearly 20 years of tracking global citizen and stakeholder perceptions around business and its role in society. It includes representative samples of around 1,000 adults per country in 22 countries. This includes some urban-only surveying in certain developing countries. Interviews were conducted both face-to-face and via telephone between December 2014 and March 2015.

The global survey data was supplemented by consumer ethnographies performed by BBMG in April and May of 2015. Verbatims have been edited for clarity and brevity; full responses are included in video clips.

The Aspirational consumer segmentation has been validated across the food, fashion, beauty and retail sectors, and presents a compelling new model for understanding the market for sustainable consumption and the opportunity for strong relationships between companies and consumers. Based on nearly four years of investigation, it provides a foundation for defining the key audience for sustainable growth.

ABOUT BBMG

BBMG is a globally recognized brand and innovation consultancy dedicated to creating brands of enduring value. We design brands and re-engineer brand experiences to drive growth and positive social impact. BBMG.com

ABOUT GLOBESCAN

Since 1987, GlobeScan has been providing evidence-led counsel to a wide range of organizations seeking to understand and engage with their varied stakeholders, and to adopt or refine strategies on brand, reputation and sustainability. Our mission is to unite business and society in envisioning and delivering a sustainable and equitable future for all. GlobeScan.com

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