

Anarchist in slippers

The Change Report 2022

Where we uncovered a world of
broken systems and the people
trying to live in it.

ROTHCO Part of **Accenture** Interactive

What's your definition of anarchy?

Chaos, punk, violent upheaval?

Anarchy is really any form of questioning the established system. It literally means, without ruler. It is our contention that there is no sector, pillar or structure of society that isn't experiencing a massive disruption. There are few universally accepted 'rulers' in any sector. Everything is up for grabs and as a result, the average person is experiencing what we're coining an 'awakening anarchy.'

Anarchy is everywhere and our image of an anarchist as a punk in hobnail boots doesn't represent the individuals we're talking about in this research, hence our title. So the world is an anarchic place, but to paint it more positively, you could suggest that anarchy is an act of dreamers, dreaming of a kinder, more equitable society.

This research is about people. Your clients, your customers, maybe even you. When you take a proper look, there is dissent everywhere. While this anarchy might not mean people in the street, there are people taking to the street. Dissent is showing up in a multitude of other forms, from dropping out, to non-participation, to hacking systems to create DIY alternatives.

We're drilling into global news to understand the why, and to show that what's happening elsewhere is happening everywhere, and that behaviour and attitudes we're uncovering now, have been forming for a long time. We'll show the undercurrents behind The Great Resignation in the US; what's driving this and what is the long term impact on work life, and the relationship between employer and employee? And why has there been a sharp rise in the proportion of young people (18-44), who think their society is fundamentally unequal and favours the rich, as seen in the latest British Social and Attitudes Survey.

The Covid pandemic forced change, the climate crisis demands change, but what we've found through this research, is that the last two years haven't been 'The Great Reset,' but more of 'The Great Reinforcement'. What could be called 'radical' change has been occurring for some time, and it's very much becoming mainstream. This research will attempt to define that change for you and show you where we're heading fast.

Ultimately, as your partners, we are here to engage the world on your behalf. Understanding it, is half the battle.



Leading edge
thinking

to

Outpace the
change

Areas of focus

In preparation for this research, we reviewed our output for our clients for the past year. What were the common challenges and areas of opportunity that were showing up time and time again? We then cross referenced those themes with trend and forecasting reports in economics, politics and media. Three key areas of interest emerged from this:

Community, Sustainability and Money.

Looking at people and their behaviour through the lens of these three themes has unlocked some fascinating perspectives, and convinced us that, more than ever, brands are communicating in a fractured landscape. We all need signposting, local knowledge and expert map readers to ensure our messages will not be lost.

Our Approach

The background of the slide is a complex, abstract composition. It features a large, dark, textured area on the left that transitions into a lighter, more detailed section on the right. In the center-right, there is a prominent wireframe sphere, resembling a globe or a molecular model, composed of thin lines. Below this sphere, there are several thick, parallel diagonal lines that create a sense of depth and movement. The overall aesthetic is modern and technical, with a focus on geometric forms and textures.

Our approach to this research was from people out. Yes, we wanted to understand change, but more importantly, we wanted to understand how people were reacting to the change. So we spoke to people. Lots of people. Starting with the leading thinkers and experts in our areas of interest. We then got out into the real world taking part in everything from compost making courses to speaking with the dead.

To give rigour to this qualitative work, we used extensive third party data and partnered with CDI to further verify and quantify the behaviours and trends we uncovered.

The brains behind Our brains

20 industry experts

Guerrilla research

CDI Analytics

5 radical thinkers

15 cultural experts

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Laura Whately- Financial Journalist &
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Secondary data analysis

ANARCHIC MONEY

The background is a dark blue field filled with intricate, glowing blue lines that form a complex web of circles and spirals, reminiscent of a stylized atomic model or a chaotic system. In the upper right, there are dark, angular geometric shapes. In the lower right, there are diagonal stripes of a slightly lighter blue. The overall aesthetic is futuristic and high-tech.

Status quo rejectionism

This report opens with a reminder that anarchy isn't only about violent upheaval, it can simply be about rejecting status quos and solving for yourself.

Little surprise then that anarchic problem solving is so vividly evident in the world of money. We saw that very simply 'the system' isn't working, and people aren't willing to just drift along in it.

When 62% of workers are struggling to manage their workloads, but financial fragility and 'employed poverty' is so rife that 'week-to-week' is proving too uncomfortably long a time horizon for many to live by, it's not hard to understand why those who can aren't just pushing back, they're rejecting norms and looking for alternatives that work for them.

Then, in our review of spending patterns we learned that people are rejecting their own status quos and shifting pent up demand towards 'the transformation' category.

Subthemes

The system is breaking,
don't be left in pieces

Stepping off
'the treadmill'

Transformative
spending

1. The system is breaking.

The system is breaking

"I don't know that he is (the right man for the job) but I know that I'll take 'results may vary' over absolute failure any day of the week."

Trump Voter in 'Disunity, The Trump Trip' Documentary.

This is the kind of 'better the devil I don't know' despair we heard about when investigating the financial fragility of people today.

Established systems aren't working, and people are doing more than just taking to the streets to protest over the housing crisis. For want of a financial foothold, people are taking financial 'bets' and designing their own workarounds of broken housing models.

The share of Irish workers who could not meet an unexpected expense was 29.2% pre-pandemic.

1 in 10 were considered financially deprived.

(NERI Institute)

80% of households in Ireland saw gross household income diminish in Q2 2020.

(Central Bank)

Even beyond this crisis, money has been difficult for younger people. With the last crash, a lot of millennials graduated into circumstances where wages were lower, so it's harder to reach traditional milestones.

Laura Whately, Author
Money A User Guide

77% of Americans say their financial situation makes them feel anxious, and 58% feel that finances control their lives.

(Capital One, 2020)

The fight for a financial foothold

So many of us are still raw from Covid-induced personal finance catastrophes, but through our research we learned that regardless of circumstances very few feel like they're on a sure financial path. Many have found that what they called a safety net was insufficient, while both the lifestyle creep that characterised a lot of 'lockdown windfall' mismanagement, and frictionless-finance splurges make it clear that most people need more coaching to feel financially well & navigate a cashless, buy-now-pay-later world.

Few can 'hack' their financial woes with just a shot of prudence. Many are seeing the enduring effects of the last crash catch up with them: the diminished lifetime earnings of many millennials aren't adding up to yield homes in a global property market that increasingly feels like it conspires to lock people out of ownership. Nobody is suggesting the economic shifts of the last 18 months will reverse that.

○ ○

We're seeing more hand-to-mouth style consumption even from people with good incomes. Not everybody is trained to structure spending.

Christos Makridis,
Digital Economy Stanford Academic

○ ○

We're witnessing whole sections of society being shut out of parts of our city because they can no longer afford apartments. That's the case here, in London, Paris, Rome, so many cities.

Michael Mueller, Berlin Mayor

Gaming the system

Despite increased-public consciousness of their parallels to gambling, crypto-fuelled efforts to game the system are in the spotlight.

This style of 'gaming' was the driver for a Reddit-engineered assault on Wall Street that was heralded as a cultural moment and a long awaited opportunity to 'beat the system at its own game'. But, many query if it will reflected on as anything more than a protest against a broken system.

But this game carries a darker side. With Dodgecoin being a satirical digital currency that's now taken over many of its rivals.

What's happening in money culture right now looks something like this: the masses, frustrated by rigid societal inequality and a lack of economic opportunity, are playing whatever new lottery comes along. The price to play is expensive, the rules are designed for them to lose - and they do. According to research firm Chainalysis, investors lost roughly 2.7b to investment scams in 2020.

Fast Company, October 21



By buying GameStop, it's kind of like beating them at their own game.

Ben Patte, 16,
in conversation with NYT

New systems

What happens when the game becomes reality. Look to Robux, a digital in-game currency that can be earned in-game and then translated into USD. Alternatively, it can be brought with USD to be used in the games metaverse. Here the line between 'real' and 'digital' money blurs.

Perhaps the most radical exemplar of this lies in El Salvador with a Bitcoin city planned that's powered by a volcano. The city has also legislated their digital currency to the same status as the state currency. With each member of the populus given an amount that they can withdraw from ATMs and pay for household goods.

For the people of El Salvador this is their new reality.



System workarounds

Because of all of these barriers to fundamental life milestones, formerly fringe extremes are becoming mainstream necessities.

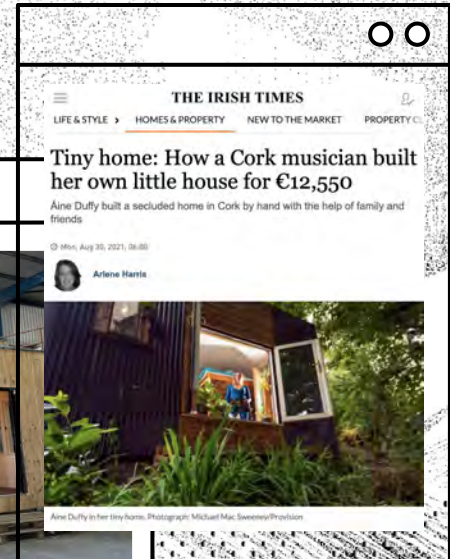
While there's a lot to be celebrated in the ingenuity of housing system workarounds, it's a sad indictment of the system when 'Tiny Homes' become the basis of a mainstream, global Netflix hit, and then the only actionable way forward for hordes of Irish people forced into housing market rejectionism.



@thesmallchangemovement

I'm Paul. I'm taking housing into my own hands by leaving my job, selling everything I don't need and building a tiny house on wheels.

Fed up with what's on offer, my hope is to find a sustainable, affordable and scalable alternative to traditional housing that can be replicated.



2. Stepping off the treadmill.

Stepping off the treadmill

Why drift along in a system that isn't working for you? That's the question driving cultural phenomena like the Great Resignation, Striketober in America, Tangping 'Lying Flat' in China, and the rise of the 'time millionaire.'

People have had time to pause, reassess, and ultimately reject rules that weren't working for them and as a result millions are opting out of pre-pandemic 'striving' norms.

A resistance is forming, their mission is clear: a no-return to our pre-pandemic lives.

For some, that means a total life redesign that makes less work 'work' by embracing a more pared back way of life that puts time above all else. The micro-anarchy version of this is simply indulging in the benefits of more time-saving services.

For others it means a shift to freelance and self-employed work, or celebrating all things Anti Work on Reddit.



People are focusing more on time. Thinking about how they can use their own money to improve their quality of life. It's not an instrument for getting ahead, it's an instrument for living well

Ashley Whillans, Professor of Behavioural Science, Harvard Business School

1 in 4 young people in Ireland describing themselves as overworked
(up from 1 in 10 the same period just last year, Global Web Index)



The idea of what success means has changed. Does that mean money? Property? Time? Covid has made people pause

Laura Whateley, Financial Journalist & Author of 'Money A User Guide'

Saving Time not Money

Perfecting the balance of time vs money is a fine art. Until recently, it seemed the scales were tipped heavily on the side of prosperity and economic gain. But that came at a cost and if there's something the past couple years have taught us, it's that money does not always translate to success. A mass recalibration is happening and people are not prepared to let go of their time gains from the past 2 years. A new hallmark of success is emerging, The Time Millionaire.

Meanwhile in China, a unique form of protest has emerged, one that involves doing nothing at all. Sparked by a viral post on the social network Baidu, *The Lying Flat* movement is being hailed by the youth of China, many overworked and overstressed, who want to escape from the pressures and competitiveness of modern day society. It represents the antithesis of President Xi Jinping's 'Chinese dream', the vision for modern Chinese society which the Financial Times described as "a hamster wheel of increasing effort and diminishing reward". The youth of China aren't buying into it and they're fighting back by lying flat.

WORLD

Chinese Millennials Are Giving Up the Rat Race to 'Lie Flat'

| WHERE DO I SIGN? |

Zijia Song

Updated Jul. 07, 2021 6:07AM ET
Published Jul. 07, 2021 5:00AM ET



Time Millionaires and those choosing to lie flat have something in common - they represent a cohort of society who are at odds with the current system and are choosing to carve out a life that's better aligned to their new value systems.

Making work, work for me

Workers everywhere are hungry for change and are willing to risk safety, security and the prevalent social contract to achieve this. There's a feeling that the current status quo isn't serving them so what have they really got to lose?

The Great Resignation, a term coined only earlier this year, is something we're all too familiar with now. In the US "Striketober" has taken a hold and more 100,000 workers have authorized their unions to go on Strike across various sectors from Hollywood, the Food industry and academia.

Brands are responding to this new relationship with work. In May, Airbnb implemented 100 changes to adapt its platform to fit customers who are tethered by work but still want to travel to new places and stay for longer once there.

More than a third of people searching Airbnb in early 2021 were flexible in terms of date and location of their desired trip.

Or they'll just walk out all together

People are stress testing the definition of work itself and the separation between earning vs living is no longer so binary. Employers are recognising the ramifications of not getting this right and are going to great lengths to let current and prospective employees know they offer a more flexible, employee-oriented understanding of how people live and work. Earlier this year Facebook announced that any employees whose job can be done remotely can request to do so permanently if they wish. They've also said work schedules for those returning to office will be flexible.

Elsewhere, the conversation around the 4 day workweek isn't going anywhere. The anarchist is just warming up, mass disruption has meant that everything is up for grabs and nothing is safe from disruption.



VICE

Reddit's Million-Strong Antiwork Community Wants to Blackout Black Friday

The viral subreddit is organizing a general strike on Black Friday—can it become a political movement?

The Undercurrent

Aspiration meets transformation

3. Transformative spending.

Transformative spending

Since day zero of the first lockdown, we've heard how pent up demand will be one of the drivers of economic recovery, but what is there the greatest demand for?

Yes, we all crave 'normal', but nobody craves going back to things *exactly* as they were. Through our research, we heard about a new category: the transformation category.

Think of the range of experiences people have had over the pandemic. For some, it's mostly been a disconnecting time. They're focused on experiences & getting spontaneity back. Others are gravitating towards tangible things: after a disruptive time that feels constructive. That creates a sense of control. It's like a version of the Ikea effect - after hardship there's greater value on something you can hold.

Ashley Whillans,
Behavioural Economics Professor @ Harvard

Transformative spending

If you change how people feel about themselves and their circumstances, you're in it, and you can expect to benefit from anarchists dreaming of a better reality. We're not talking about products that fix a problem, we're talking about anything that exudes the unmistakable glow of an upgrade.

That could be something durable that makes things feel a little less unmoored after so much turbulence, or something novel & experiential that ends the novelty famine we've all suffered. Courses, wellbeing-boosters, things that feel like a 'reward', whatever - if it helps a person unlock a 'transformed' version of themselves it's got big 'pent-up' demand power.

Meaning is the next consumer sensibility, and one of the best ways to get it is through a transformative experience. Travel, Wellbeing, Education - they're transformative things. For those people who've had hardship, yes, beyond experiences, I can see those durable things being valued for their transformative power.

Joe Pine, Author of the Experience Economy

Consumer-Packaged-Compensation

We've all heard about revenge spending, but there's more meaning behind this thirst for tangible rewards for a tough time than we initially gave it credit for. Individual patterns within this broader trend of transformative spending are based on whatever it is that will prove transformative for the individual.

Psychologists have found that after hardship the most comfort is found in something tangible, so for many who have experienced loss, or more than simply feeling constrained by this experience, the best way to compensate themselves will be with tangible items. This is evident in the luxury sector, up +29%, the hair, nail, and skin up by 300%, and searches for mindful apps up by 2,483% since 2020.

To become the method of compensation of choice, brands need to convey the transformative power of what they sell e.g., do you sell a utensil, or do you sell something that can help someone love their kitchen again?

When people have experienced hardship they actually gravitate towards material purchases because things like furniture, they're durable, they're tangible, they're not ephemeral. It feels sounder. It's problem based coping. 'Ok, I can't change the world, but I can change my house a bit'

Ashley Whillans, Behavioural Economics Professor @ Harvard

The New York Times

Even in a Pandemic, Fine Jewelry Is Selling

Jewelers say many buyers are compensating for the loss of travel — or just treating themselves.

Where does this lead us?

Then

Materialism

The days of Conspicuous Consumption. Where our purchases portrayed social signifiers.

Now

Experience

The age of the intangible but valuable, travel etc.
The very thing Covid put a pause on.

Next

Transformation

When aspiration meets transformation. Personal meaning takes center stage and can found in both the tangible and intangible.

The so what?

The system is breaking

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The entire global financial system is being challenged. Joining the game now is more valuable than entering too late.

Stepping off the treadmill

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As the nature of aspiration changes, there's an opportunity for brands to lead that redefinition.

Transformative spending

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If you want to soak up your share of pent-up demand, you need to speak to the transformative power of what you sell.

ECO ANARCHY

Sustainability is bigger than a trend, it is the issue of our times

We crossed the tipping point and awareness of sustainability is huge; it is everywhere. However, *understanding* is still developing. The conversation around sustainability has become more nuanced, complex and in-depth. The images and statistics in the news are terrifying and people are frightening and beginning to take action.

Alongside the evolution of sustainability, stereotypes are breaking down. Sustainability is not niche and not just for eco-warriors. As a movement, it is becoming more inclusive, and welcoming new advocates into the fold.

What is really powerful is how people are reacting. In a consumerist society, small acts of sustainability are actually acts of defiance, self-reliance and a rejection of the accepted norm. People are not seeing businesses and governments stepping up fast enough, so they are creating their own sustainable solutions.

Subthemes

Modern Grannies

Climate Fatalism

Emerging Eco Men

Sustainability is full of 'orphan problems'

The conversation around sustainability has become more complex; we hear about circular economy, zero waste, low carbon, deforestation, ESG, net zero and so on.

The terms are proliferating and 'sustainability' is fragmenting because it is full of 'orphan problems'. These are problems that are so large, they don't have one or two parents; they are orphans. Who is responsible for climate heating, ocean acidification or ice caps melting? The issues are so complex that everyone is responsible which also means no one is responsible.

We spoke with Ruth Mourik, who's organisation in the Netherlands understands and creates collaborative projects to begin to solve these problems. She said that level of collaboration required across the planet in the coming decades will be unparalleled.

We need multi-year, multi-stakeholder, massively collaborative solutions.



Ruth Mourik, Chief Executive Officer (CEO)
Copenhagen Centre for Energy Efficiency

People are taking matters into their own hands

Besides the massive solutions, we also need small, everyday, personal solutions. And this is what is happening; we are seeing people step up.

They are asking themselves 'what can I do personally? How can I make a difference?'

I can rewild my garden.

I can choose my bicycle.

I can learn to mend my clothes.

I can reuse and reduce.

I can learn about
regenerative farming.

I can support brands who
have a circular ethos.

I can find little ways to
have a lower impact life.

I can fight back in my own small
way against a system that is not
nature positive.

1. Meet the “Modern Grannies”

Meet the “Modern Grannies”

What’s really interesting about these new behaviours is that they are not new.

They are packaged as new. But really this is how our parents and grannies lived. Isn’t shared ownership just like going to a library? Isn’t upcycling clothes what everyone had to do when they had limited clothes?

There are positive announcements about schemes for recycling ... isn’t that like us leaving out the milk bottles for the milkman in the 80s? Or our grannies giving back the jam jars for 1 penny in the 50’s?

There is an emerging group, that we have called **the ‘Modern Grannies’**. They are finding ways to push back against the system, live more simply, but doing it with some modern comforts like Wifi and hot water.

In a more more more society, less is a quiet act of anarchy.

People are rejecting the 'more more more' narrative of society and returning to ways to live more simply and creating their own acts of defiance and taking back control in a constructive way.

They are driven by a sense that their lives are frantic and the constant striving for more doesn't make them happy. Alongside this they are looking for ways to live a lower impact life. They are returning to simpler pleasures and reducing their environmental impact. These acts of quiet rebellion can feel like aspirational frugality.

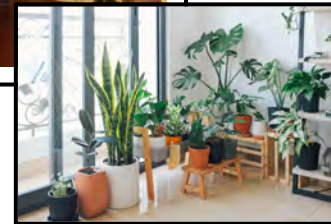
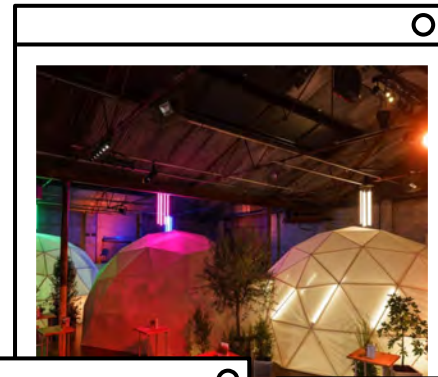
Behaviours that had gone out of fashion have returned and now have a cache that they didn't have. During the pandemic, people took time to figure out how to make sourdough from scratch, ensuring they avoid food waste and holidaying a short drive away rather than abroad.

Back to our roots

As people attempt to live more sustainably, they are naturally reconnecting with old skills and hobbies. Throughout the pandemic, we saw the rise of gardening, composting, and sewing - activities that may have previously been considered 'grannyish' were adopted across generations and social classes.

Gardening exploded in 2020 when Irish consumers spent €1.2 billion on their gardens which was up 50% versus 2018 figures (Bord Bia). The Royal Horticultural Society(UK) had a 533% increase in web traffic in the first 9 days of the first lockdown.

Tech giant Samsung want to encourage people to use technology to make the best of small growing spaces at home. They created a pop-up urban farm vegan pizzeria where the tomatoes, mushrooms and herbs are grown in dark spaces with lights and heat lamps and are all connected to a Samsung app on a Samsung tablet, so growing conditions can be controlled at the touch of a button. Anyone can do it ... find a dark corner, some cardboard and a blue light connected to an app and you'll be drowning in mushrooms before you know it.



In the UK, 80% of 18-34 year olds in the UK agree that gardening is a cool hobby.

[Independent.co.uk](https://www.independent.co.uk)

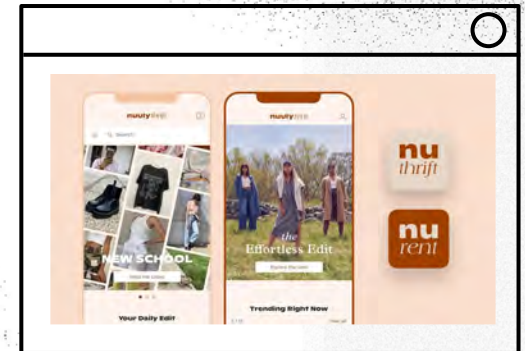
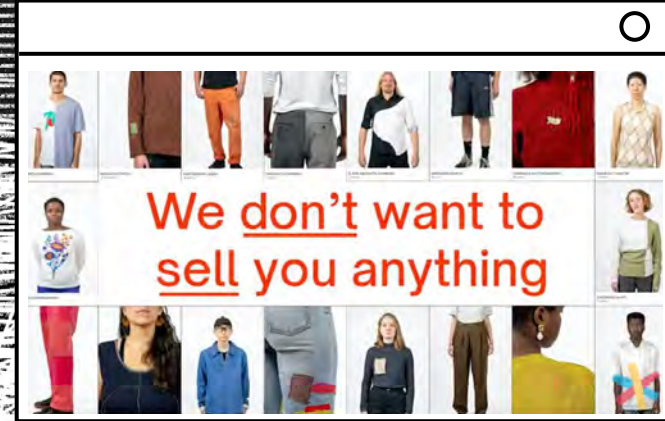
Self-Sufficient chic

Another space that exploded during the pandemic was the second-hand clothing market.

Previously, thrifting carried a social stigma; but now people are embracing the joy of buying used clothes as a way to reject big business and show-off their sustainability credentials. A piece of vintage clothing can be seen as a little act of defiance in the face of a fashion world telling people what trends to buy.

We are seeing brands facilitating this shift and putting power back into people's hands. Nuuly Thrift is a second-hand apparel resale marketplace launched by Urban Outfitters. 'Fixing Fashion' is platform that provides instructions and video tutorials to repair, remake, resize and recolour unwanted clothing items.

This is big business and it is estimated to be worth \$64 billion globally by 2024, which is up from \$28 billion in 2019.



Self-Sufficient SUPER chic

Mirroring the revival of flea markets among the general market, the luxury consumers are looking for a more ethical way to enjoy luxury brands.

According to Boston Consulting Group, the global market for pre-owned luxury goods is worth between \$30 and \$40 billion and is expected to grow by 15% to 20% annually over the next five years.

Luxury resale platform, Vestiaire Collection, was valued at \$1.7 billion in September 2021. They reported that their orders rose by a massive 90% in the previous year.

Jean Paul Gaultier has created a section on their website to sell vintage pieces and they will also rent out some of their more iconic pieces.



VestiaireCollective



Vintage Gaultier

Guerrilla research

We took a trip to a massive flea market in Dublin and their first event since the Pandemic started. Sustainable Fashion Dublin had been started by Taz and Ger, two 20-something Modern Grannies in 2019 and they had to move it online during the pandemic. They noticed how their young audience was becoming larger and asking for advice beyond vintage clothes, so they expanded and rebranded to The Useless Project. The story behind the name is insightful and two-fold; people can feel 'useless' when it come to trying to live a more sustainable life, but also because the answer is simple - we all need to Use Less stuff.

The flea market has expanded hugely and we met several 20-somethings who had taken the opportunity during the pandemic to develop new skills. These new skills became small businesses, like home-sown face-masks made from materials that would otherwise go to waste, and greeting cards designed on a personal ipad on biodegradable paper.

What is really interesting at the flea market, in speaking to several people, they know exactly why they are there and what it means for the planet; they are well-informed and are connecting the dots between sustainability, life-simplicity and personal happiness.

The Useless Project





Living more sustainably just completely brings back that sense of connection, human beings together engaging in a way that's like, God, I'm not alone.

Taz & Geraldine

Founders of The Useless Project

Modern Grannies

Disposable



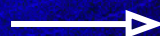
Durable

Disconnected



Connected

Meaningless



Meaningful

2. Meet the 'Fatalists'

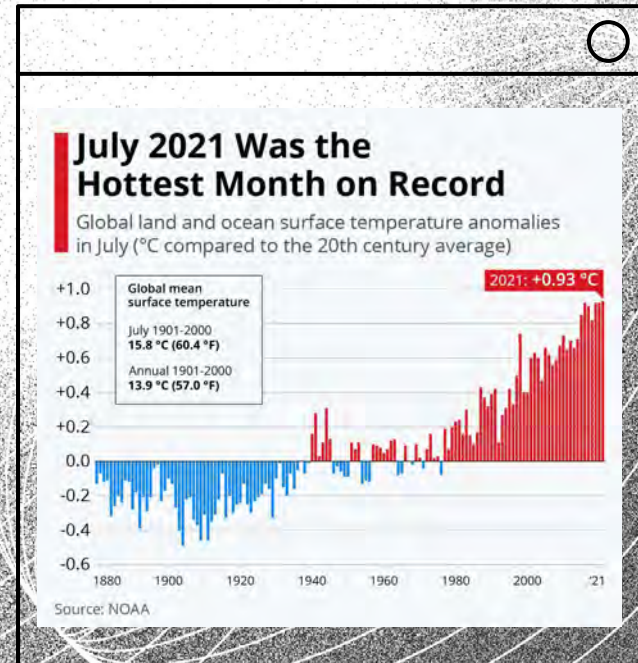
**We are seeing
frightening
images of
climate chaos
every week**



Climate fatalism

The climate crisis is a mainstream topic with terrifying images and headlines in key publications on a daily basis. The evidence is irrefutable. The planet is getting hotter year after year. And these charts along with other stats and images are very frightening.

The fear can overwhelm many, but there are those who are fighting back.



1 in 5

**People under 35 believe
it's too late to fix the
climate crisis.**

According to a study launched at COP26, of 20,000 people worldwide, 20% of people under 35 believe it is too late to fix the climate crisis.

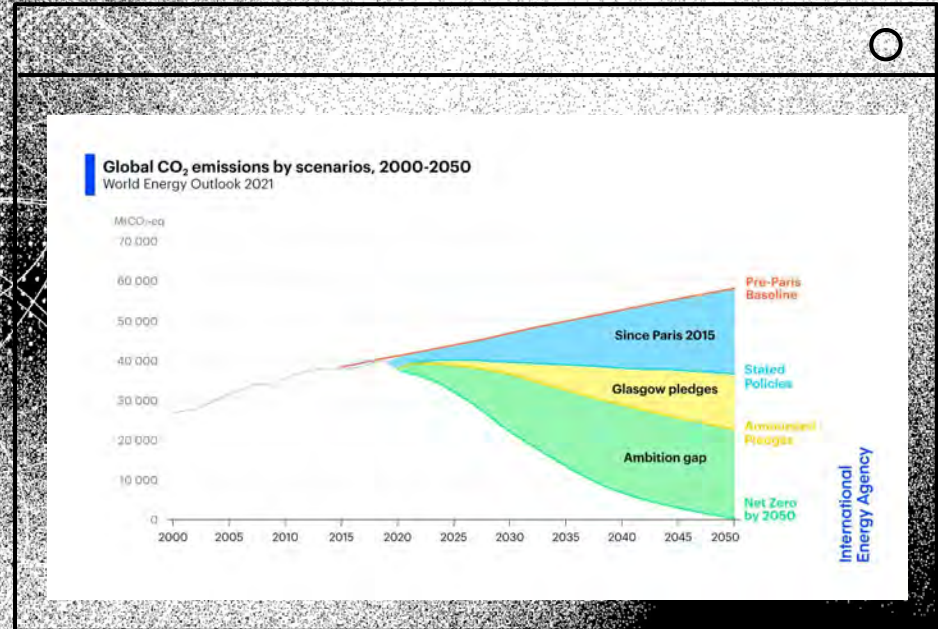
They have given up hope.

And they look to governments and are disappointed. Across the world, in the same study by IPSOS and Futerra, only 30% of all respondents believe their government is stepping up to take action.

Eco-anxiety is on the rise.

Eco anxiety comes less from the frightening predictions and more from the perceived lack of action to prevent and avoid disaster

This group of Climate Fatalist reason that Governments and businesses know the predictions and that they are not doing enough. People walked out of COP26 because all the pledges made by governments will not put us on track to stay below 1.5 degrees.



Prepping Now Everyday

Prepping is the practise of preparing all things needed for survival and people who do this are known as 'preppers'. They are a small but devoted group, mostly based in the United States. This survivalist trait has long held associations with wartime living. Interestingly, the pandemic and the climate crisis has amplified this behaviour. Online, in small communities, they share tips of how to best prepare for disaster. Notably, the audience profile here is aged 25-35, followed by 35-45. Most are living in urban rather than rural areas and are split evenly between men and women.

Bradley Garrett, a social geographer at University College Dublin and author of Bunker: Building for End Times, estimates there are about 20 million preppers globally. "I saw a kind of insatiable desire for self-sufficiency and safety in this age of uncertainty," Dr Garrett says, during his research. "It was interesting to me how culturally and politically diverse they were; it was strangely one of the few communities that we find today that really is not partisan."



USA based company providing all you need for the Apocalypse bag

Procreation Protest

Having a child is the greatest act of hope in a positive future and for Climate Fatalist who don't see that, they are fighting back. There is a movement of women in the UK who are on 'birth strike' and refuse to bring a child into a world with massive threats from climate change and biodiversity loss.

A women-led network of Americans called 'Conceivable Future' are bringing awareness to the threat climate change poses to reproductive justice, and demanding an end to US fossil fuel subsidies.

While 'birth strike' may represent the extreme edge, a poll in the United States found 33% of Americans younger than 45, either don't have children or expect to have fewer than they might otherwise have had because they are worried about climate change. Millennials and Gen Z are the first generations to realise they are inheriting a world with far greater chance of imminent, catastrophic, irreversible change and are less willing to bring a child into it.

33%

of Americans younger than 45 either don't have children or expect to have fewer than they might otherwise because they are worried about climate change.

CONCEIVABLE
FUTURE

Climate Fatalists

Fearful



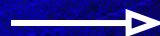
Prepared

Suspicious



Independent

Angry



Active

The Undercurrent

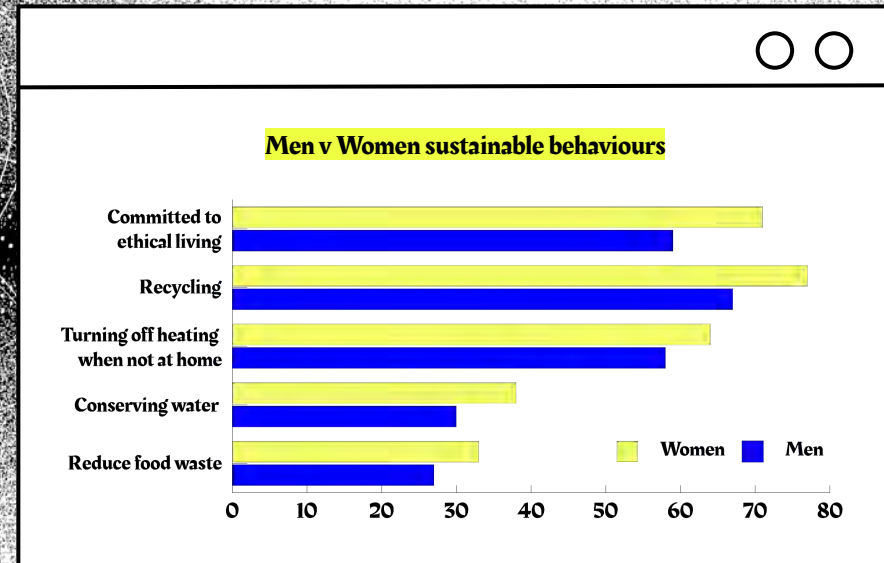
The eco gender divide

3. Emerging Eco men.

Is sustainability a woman's problem?

Mintel found that across a whole host of sustainable behaviours, women were more inclined than men to do them. They noted that there was an 'eco gender gap'.

Pound for pound, when men spend money, their spending causes 16% more climate-heating emissions than women (Carlsson Kanyama, et al. Journal for Industrial Ecology 2021)



The Eco Gender Gap, Mintel 2018

The Green Feminine Stereotype

Research shows there's an unconscious connection between eco-friendliness and perceptions of femininity among both men and women. People who engage in green behaviors are often stereotyped by others as more feminine and even perceive themselves as more feminine. This is known as the green feminine stereotype.

We spoke with *Mathew Isaac, Professor of Marketing in Seattle University* and he told us that the reason men are less likely to engage is that sustainability threatens their masculine identity.

However some men, particularly younger men, are pushing back against the outdated stereotypes and perceptions and demonstrating that sustainability and masculinity can go hand in hand.

What is really powerful for marketers is that there is a critical role for brands to help break down the stereotypes.



Mathew Isaac,
Professor of Marketing in Seattle University

Masculinity and Meat

Some of the oldest, most deeply entrenched codes of masculinity are some of the most destructive behaviours to the environment. These codes have been reinforced through social norms and popular culture for generations and thus are some of the most challenging for men to break away from.

For centuries, meat has been a bastion of masculinity. There are many theories behind this relationship (Modlinska et al. 2020). Think back to evolution - meat meant hunting and danger and so it became a prized food with great status in a patriarchal society.

Women are more likely to be vegan or vegetarian (UK Vegan Society) and, interestingly, mens' diets are responsible for 40% more climate-heating emissions than those of women.

Soy Boys

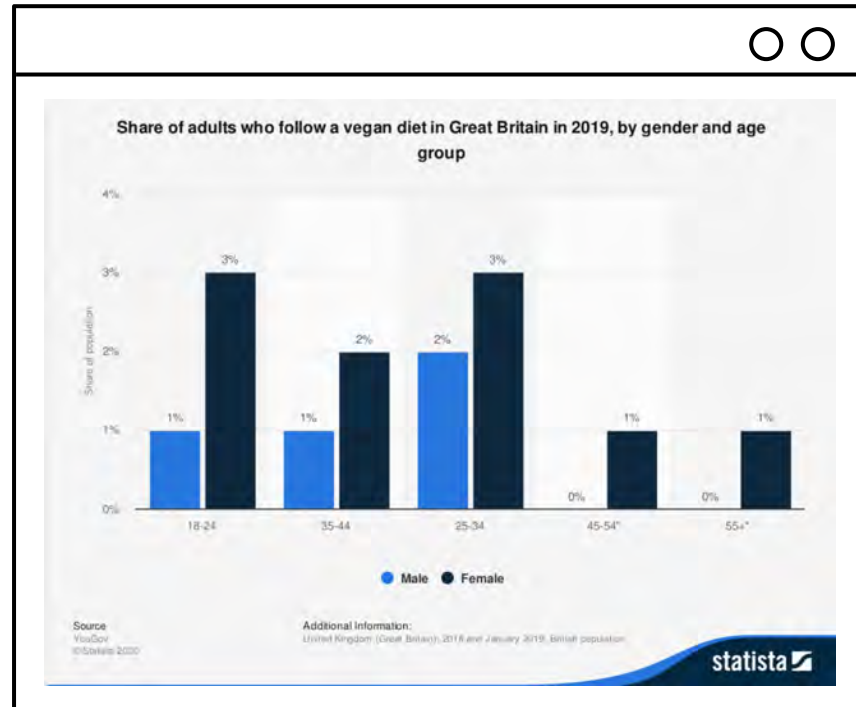
A derogatory term used to describe men who lack all necessary masculine qualities

Masculinity and Meat, take two

There is a younger age cohort of men beginning to break the link between meat and masculinity.

Though still small, it is interesting to note that in the UK, 1% of 18-24s and 35-44s follow a vegan diet. This rises to 2% among 25-34 year olds.

Following a vegan diet 100% of the time is a very strong commitment but it seems men are opening up to at least trying a vegan diet. According to a study earlier this year in the Grocer Magazine, 1 in 10 men say they ate Vegan in January 2021 in the UK. Perhaps this will see a greater increase in January 2022.



Vegan Masculinity

We met with Barto Sova who is the founder of Sova Vegan Butcher, Ireland's first fully vegan restaurant. A former weightlifter, his goal is to show men there is more to masculinity than eating meat.

He told us that 60-70% of his customers are female but that he notices more men opening up to the idea of vegetarianism and veganism.



Sova Vegan
Butcher



Tesla are making sustainability attractive to men

Petro-masculinity suggest that fossil fuels actually mean more than just profit; they contribute to the male identity. In 2014, Swedish researchers found Climate Denial was intertwined with a masculinity of industrial modernity.

Professor Mathew Isaac pointed to inventions like Tesla that are making men more interested in electric cars and sustainability overall. Previously electric cars were small cute vehicles, but this has since changed. The brand focused its marketing on men and helped shift broader perceptions - it is possible to be both sustainable as well as aspirational and dominant.

One journalist coined the term the 'Tesla man', a guy who is a rugged CEO who has the prestige, success and knowledge of tech, and he has a good heart.



"Elon Musk's sexy, coveted, and very expensive Tesla has made the EV a masculine status symbol"

Virginia Scarff, Professor at the University of New Mexico

The so what?

Modern Grannies

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|
|

They want businesses that provide simple solutions and manage their design to reduce waste. Is there a way your business can facilitate their quiet anarchy journey?

Fatalists


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|
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The role for brands is to take genuine action and be transparent. Anything less will be treated suspiciously. Be warned this is a growing and challenging audience.

Emerging Eco-Men

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|

This is the area for brands to be most active, and play an essential role in breaking down the eco-fem stereotype. Create gender neutral opportunities and challenge expectations.

The background is a dark blue gradient. In the upper right, there is a large, faint blue sphere with a complex network of white lines radiating from a central point, resembling a network or a stylized globe. To the left of the sphere, a black silhouette of a ship is visible. In the bottom right corner, there are several parallel yellow diagonal stripes.

community

Community, together or apart.

Community was probably one of the most overused terms throughout the pandemic, particularly in our industry, as we heard multiple messages that we had all been enlightened as to the importance of local community in our lives and we would never go back to taking it for granted ever again.

However, what this piece of research has shown is that this persistent narrative is not only reductive, but more of a fad than a trend, and in many cases the longer-term impacts of our experience of the last 2 years may well have the opposite effect.

Anarchist communities is all about how people are redefining and re-imagining the relationships they have with the people and places around them. Just as we were forced to recalibrate everything in our previous lives from how we worked to how we socialised, people are also taking a step back and analysing their relationships in a way that few had the time or head space to do previously.

The result? Many are asking themselves not what they can do for their community, but what can their community do for them.

Subthemes

The rise of the Introvert

Nichification of
community

The search for belonging
at work

Are we really 'All in this Together'?

I'm sure we are all familiar with stats such as this on the right hand side at this stage. People all over the world were reporting newfound connection to their local communities on unprecedented levels, largely as a result of simply spending more time there and getting to know their 2KM radius intimately as we paced it in every direction possible. And while this was absolutely true at the very beginning of the pandemic, what we were interested in unpacking was to what extent this immediate reaction would actually result in long-term change in attitudes and behaviour.

Juxtapose this stat with the following 2 for example, taken from the UK last year. The percentage of people still describing their neighbours as 'Strangers' and not even knowing their names. While there was evidence of people pulling together with their local community in the short-term, the picture as we emerge is more nuanced, and while trends such as supporting more local businesses are likely to continue, the extent to which we derive a sense of community and belonging from our locality is less likely.

Sources: 'The Mobility Mindset' Report, Posterscope & The Skipton Building Society

50%

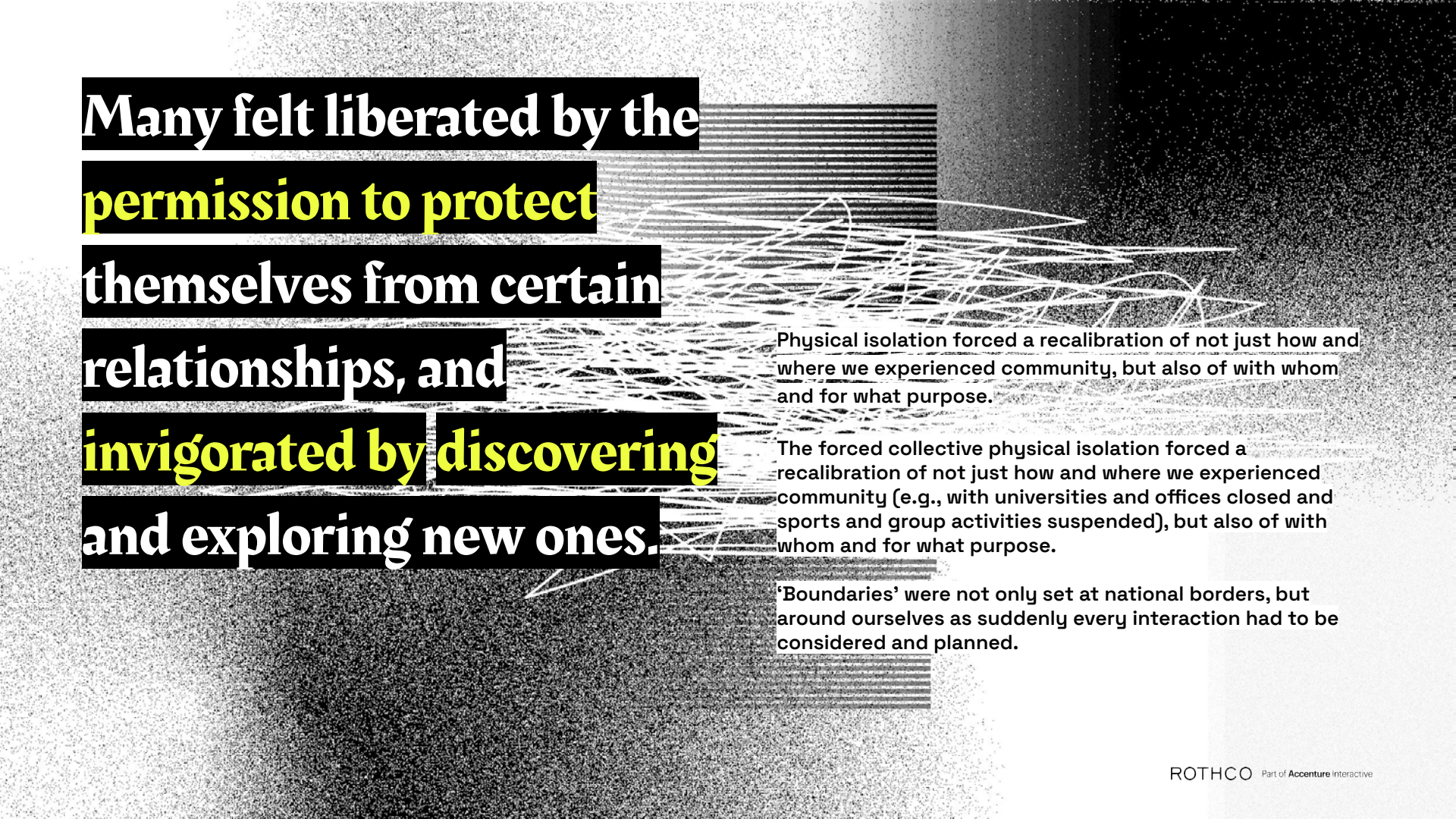
of people believe they have created a stronger emotional tie with their local community following Covid-19.

68%

Of people in the UK describe their neighbours as strangers.

73%

Don't even know their names.



**Many felt liberated by the
permission to protect
themselves from certain
relationships, and
invigorated by discovering
and exploring new ones.**

Physical isolation forced a recalibration of not just how and where we experienced community, but also of with whom and for what purpose.

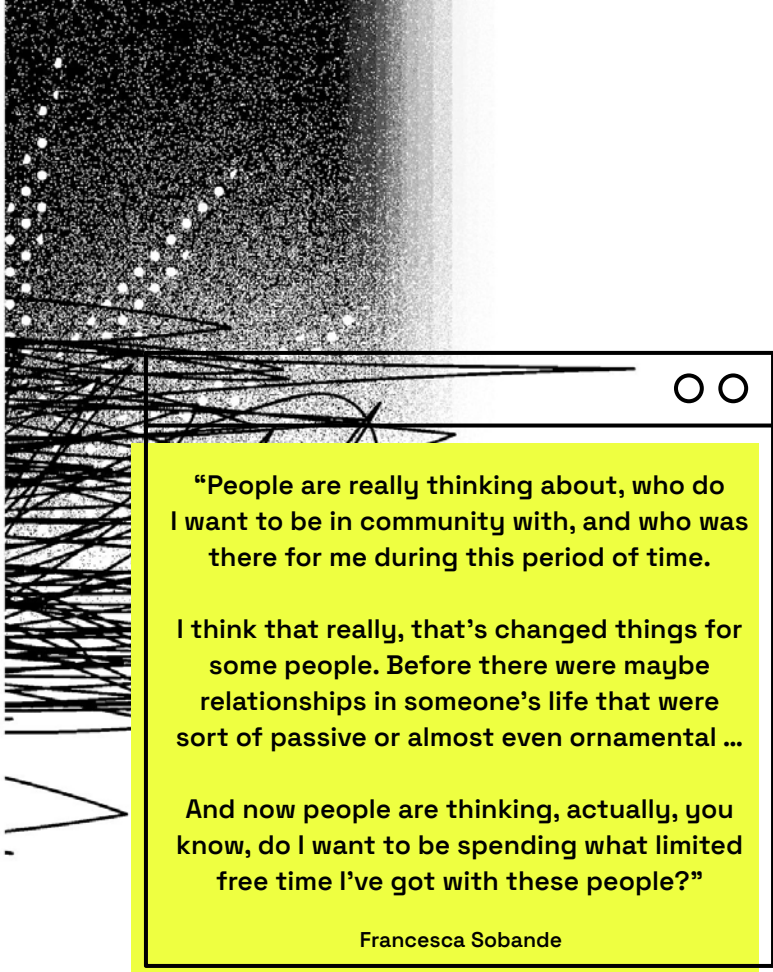
The forced collective physical isolation forced a recalibration of not just how and where we experienced community (e.g., with universities and offices closed and sports and group activities suspended), but also of with whom and for what purpose.

‘Boundaries’ were not only set at national borders, but around ourselves as suddenly every interaction had to be considered and planned.

There were no spontaneous interactions, no small talk with strangers or proximity to unlike-minded individuals

- and in those anxiety inducing and uncertain times, people felt liberated by the freedom to protect themselves from people and relationships that no longer served them. As much as we were being encouraged to check in on others, we were being told it was ok to put ourselves and our needs first ... and as we emerge into the new normal, the need to 'check-in' on others fades, but our desire to view community and relationships to others through the lens of how they best serve our needs does not.

On top of this, you had people spending more time at home, in their own company than ever before, discovering new hobbies and interests that they might not have had the chance to previously. And through this, many have connected with like-minded people, who share these interests, be it through online classes or forums - and they have found that experience inspiring and invigorating. In many cases some of these new relationships or communities feel more 'them' than their previous 'default' relationships based on proximity or convenience.



"People are really thinking about, who do I want to be in community with, and who was there for me during this period of time.

I think that really, that's changed things for some people. Before there were maybe relationships in someone's life that were sort of passive or almost even ornamental ...

And now people are thinking, actually, you know, do I want to be spending what limited free time I've got with these people?"

Francesca Sobande

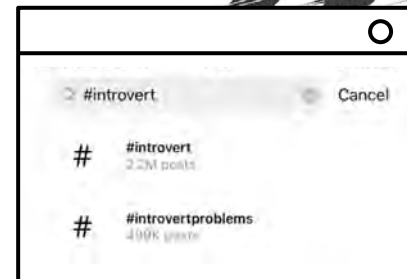
1. The rise of the Introvert.

The rise of the 'Introvert' in an extroverted world.

One of the ways people are pushing back in this every connected world, is actually by drawing in. As outlined previously, many reported a certain feeling or freedom from having permission to re-engineer their social circles in a way that better suited them. But what we're seeing emerge is that it is not only more socially acceptable to be a little more guarded with your 'energy', to be a little more introspective and protective of yourself and your boundaries, but it is in fact more socially desirable, more aspirational to do so.

It is in part a backlash we are seeing amongst younger generations who have largely grown up on social media, or even grown up with their parents documenting their lives on social media without their permission, and are now starting to question whether this is desirable and for want of a better phrase 'cool'.

One data point that demonstrates this beautifully is how many mentions #introvert has on Instagram compared to #extrovert - 10x the amount, with #introvertproblems showing x24 times the amount as it's extrovert counterpart. The irony is not lost on me that these are mentions on a platform essentially built on extroversion, but I think that underscores the point. People are using platforms that have fuelled this culture of extroversion and over-sharing to push back and project themselves as 'introvert' as a statement.



The rise of the 'Introvert'.

"I definitely do think that we're going to see more disengagement and more disconnection and also people are more critically aware of how information is more available, breaches that are happening all the time, and digital literacy is constantly expanding, There will also be, children whose childhood was broadcast on social media, who will reach a point that they have feelings about that. How do I feel about the fact that my parent was posting pictures of me and as I was growing up?"

Francesca Sobande

"Because the whole world is kind of operating as a fear paradigm... people are looking for calm and escapism largely."

"When people did stop or they were forced to stop, they realised that a whole lot of stuff in their life wasn't working and that's obviously been extremely confronting for people. There has been a huge increase in self care, not in a narcissistic kind of Hollywood way, but in an even, existential way, this very new deeper idea of self care is really coming up."

Libby Sander

The “I” in community

Historically, community was born out of people living as close-knit groups in small villages but as people moved from rural areas to cities, societies became too big to have relationships with everyone. As a result, the concept of community has come to mean something quite different in the post-modern era.

In his book, *Understanding Digital Culture*, Dr. Vincent Miller outlines how the term ‘community’ is not longer fit for purpose when it comes to describing the types of relationships that now dominate in today’s digitally-driven world. Rather, we should see them as ‘networks’. This new type of social organisation which he calls ‘networked individualism’ has formed thanks to increased physical and social mobility and developments in online communication, and it has given people more freedom, choice and specialisation - essentially allowing them to curate their relationships and communities.

As the name suggests, the downside is that we have become increasingly self-centered to the point we now feel less responsibility toward others (with the exception of immediate family) and rarely perform acts of social capital outside of our immediate circle.

“it is perhaps more appropriate in contemporary times to talk about ‘my community’, as in an egocentric network of relationships centered around oneself and one’s interests, than to talk about ‘the community’, as a set of people who all have things in common, a mutual interdependence and who share a common fate ... the internet is one part of a larger shift away from place-based ‘groups’ or ‘communities’ to person-centered social ‘networks’”

Dr Vincent Miller, Sociology and Cultural Studies, University of Kent



2. The nichification of community.

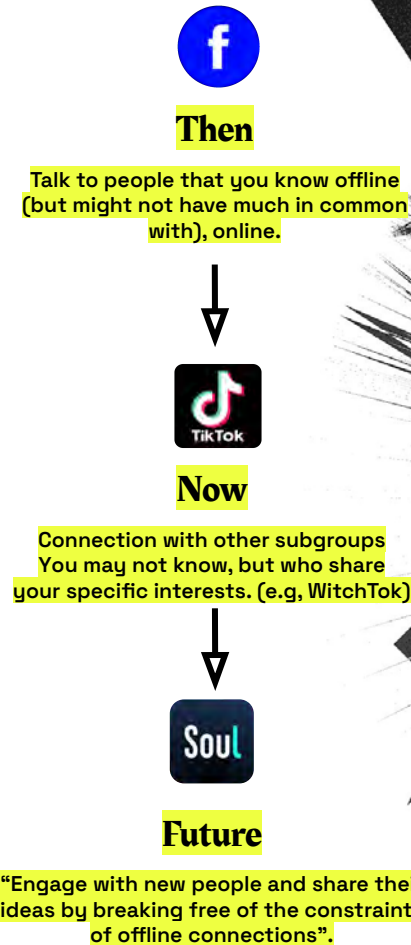
Nichification of community

The redefinition of community as interest based networks is most evident when we look at the infinite number of niche groups that exist online. From hobbyists to die-hard fans, there is a tribe out there for even the most obscure obsessions.

Social media has been evolving to reflect this nichification of community. The first two generations of social networks (AIM, MySpace, Facebook, Instagram etc..) were mostly used to talk to people online that we knew offline. As we become more individualistic, we are less interested in being connected to people we know in real life but have very little in common with.

We are more interested in new platforms like TikTok that facilitate connection with others who share our specific interests.

China's 5th most popular app Soul is another platform that embodies this next generation of AI-driven, interest-based online interaction. It describes itself as a social playground and involves creating a virtual identity with an avatar. After taking a personality test, its algorithm connects you to like-minded people. You interact with these people on "Planets", each built around a shared interest.



Nichification of community

This evolution of 'community' away from the traditional idea of groups of people that we know, who have a shared experience, or even geography with, towards individual interest based networks is something that is not only being reflected in the platforms that we use, but is also something that all of the community experts that we spoke to reported seeing.

As people sought to curate and control their communities more than ever, partly in reaction to a lack of control over other parts of our lives as Libby Sanders points out, we are seeing an almost 'pick and mix' attitude towards community develop. Where many are opting out of more general communities, such as their workforce, and opting into multiple niche communities or sub-groups that all serve different individual purposes on their own terms.

In many ways, community is the final frontier of personal optimisation as people seek to redesign the groups around them in order to maximise personal gain (e.g., knowledge exchange in relation to specific interests like cooking or gaming) and minimize personal drain (e.g., the dispensing of any personal energy on relationships that do not serve them).

The ability to have autonomy has shrunk so significantly for people in many parts of the world, that they are desperate to regain that, and perhaps in different ways from before and people will increasingly want to curate their community.

I've found in talking to younger people, for instance, if you think of teenagers, it's just normal for them to build their communities online and to meet people online in a safe way. And so I think it will be much more normal for them to do that.

Libby Sanders

We just have access to so many different types of things you can believe in and sign up to and get involved in ... you pick what's for you. So we're seeing these micro communities ... all these little tiny little groups that are serving all these kinds of needs for people that you probably wouldn't necessarily find in your own community if you were just out about asking.

Andrea Richeson

Nichification of community

However, whether or not these interest based connections are as deep and fulfilling as the ones once formed in more traditional understandings of community is up for debate. Dr. Fay Bound Alberti, Professor of Modern History at University of York, as well as several of the other experts we spoke to, don't believe they quite measure up.

“‘Community’ is both everywhere and nowhere. Individuals might inhabit multiple online and offline communities, but those based on shared interests offer less give and take than communities of place, based on where they work or live.

To truly belong to a group or a place, in a way that is psychologically meaningful and encourages resilience, requires more than a shared interest. It demands a sense of shared obligation and commitment, something both emotional and practical.”

Fay Bound Alberti, Professor of Modern History, University of York
and author of *A Biography of Loneliness: The History of an Emotion*

“I think it's misguided when this idea that everybody has to be in agreement about everything is pushed as being the basis of community”.

Francesca Sobande

“One of the key things underpinning the shifts in relation to community is there's been a significant decrease, which actually has accelerated quite a lot recently, of psychological safety”.

Libby Sanders

The Undercurrent

How it's impacting the world of work



3. The search for belonging at work.

Is 'The Great Resignation' the ultimate act of Anarchy?

So, how does all this relate to the world of work? What became clear quite quickly was that our macro theme of the 'nichification' of community and the question mark as to whether it is fulfilling our deep human need for belonging and psychological safety, was actually playing out in many workplaces across the world, whose people had the opportunity to WFH.

In many ways, our new 'niche community' was (aside from the people within the 4 walls of our home) the sub-set of people you saw on calls everyday - whom you only tended to connect with specifically over a shared interest, like a specific project. The vast majority of small talk or 'general' connection was stripped away and relationships became much more transactional.

And the results speak for themselves - we've all seen the stats of the amount of people willing to quit in the next 6 months, or even more staggeringly as shown here, the % of people who have quit in the last 6 months, doing so without anything else lined up. On face value, this looks like the ultimate act of anarchy right? This system is no longer working for me so I'm tapping out. But as we dug a little deeper we realised it was in fact indicative of something else.

Source: McKinsey The Great Attrition Report



40%

Of employees globally are at least somewhat likely to quit their job in the next 3-6 months.

36%

Of people who quit their job in the last 6 months did so without having a new job to hand.

Or indicative of something else?

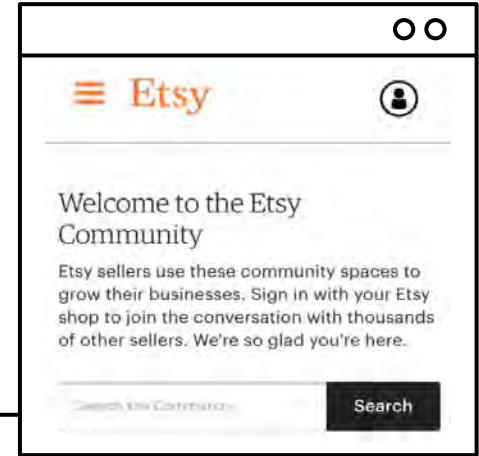
Lots of people were leaving the traditional workforce, but where were they going? One of the places we looked to get a better understanding was Etsy.

This graph documents the 62% rise in Etsy sellers YoY from 2019 - 2020, which makes total sense. Many who lost their jobs, and many others who were disenfranchised with their current work and wanted to take more autonomy over their work lives, turned to the global marketplace to monetise their hobbies and side-hustles.

You can be sure that Etsy has done lots of research into better understanding the needs states of these new sellers flocking to their platform - and what's the one stand out message on their seller homepage shown here? How many times do they mention the word community? This is the primary message they want new sellers to understand about their platform - that it's a place for them to belong.

Fun Fact: Take a little trip in 'The Way Back Machine' a digital archive or, as I like to call it, an internet time machine that allows you to view any website as it was at any point in its history, and you'll see that the Etsy of old spoke to potential sellers about the size of the prize, how many customers there were and the potential to reach them - this is what mattered most then, being part of a community is what matters most now.

Source: Statista



Missing the point:

The growing Executive - Employee Disconnect

Employers losing staff seem to be struggling for 1 key reason: they don't really understand why people are leaving in the first place. Instead of taking the time to understand the root cause, many are defaulting to well intentioned quick-fixes, such as a 'Thank you' bonus, without any effort to strengthen relational ties people have at work.

As a result they are inadvertently reinforcing the idea that the relationship is simply transactional, highlighting to people that their deeper human needs aren't being met.

When employers were asked why they thought employees had quit, the top 3 answers were:

1. Compensation. →
2. Work-life balance. →
3. Poor physical and emotional health. →

When employees who had quit were asked why they had, the top 3 answers were:

1. Didn't feel valued by their organisation.
2. Didn't feel valued by their manager.
3. Didn't feel a sense of belonging at work.

**"The view of the office looks
different from the top."**

While executives are banging down the door to get back into their corner offices, non-exec employees are demanding flexibility and they must do more to bridge this gap to retain top talent.



Brian Elliot, Senior VP at Slack and
Executive Leader of the Future Forum.

And the Gap is widening...

75%

Of **management** currently WFH want to return to the office 3-5 days a week

34%

Of **employees** currently WFH want to return to the office 3-5 days a week.

+3%

in satisfaction of their work environment **amongst management** since returning to work at a management level.

-5%




in satisfaction in their working environment **amongst employees** since returning to work at an employee level.

Source, Future Forum Survey

But the impact on minority groups is even more pronounced

While the data shows that greater flexibility in how and where we work improved the employee experience overall, the impact on minority groups has been even more pronounced, with many reporting higher levels of equality and feeling supported in the workplace as a result of working from home.

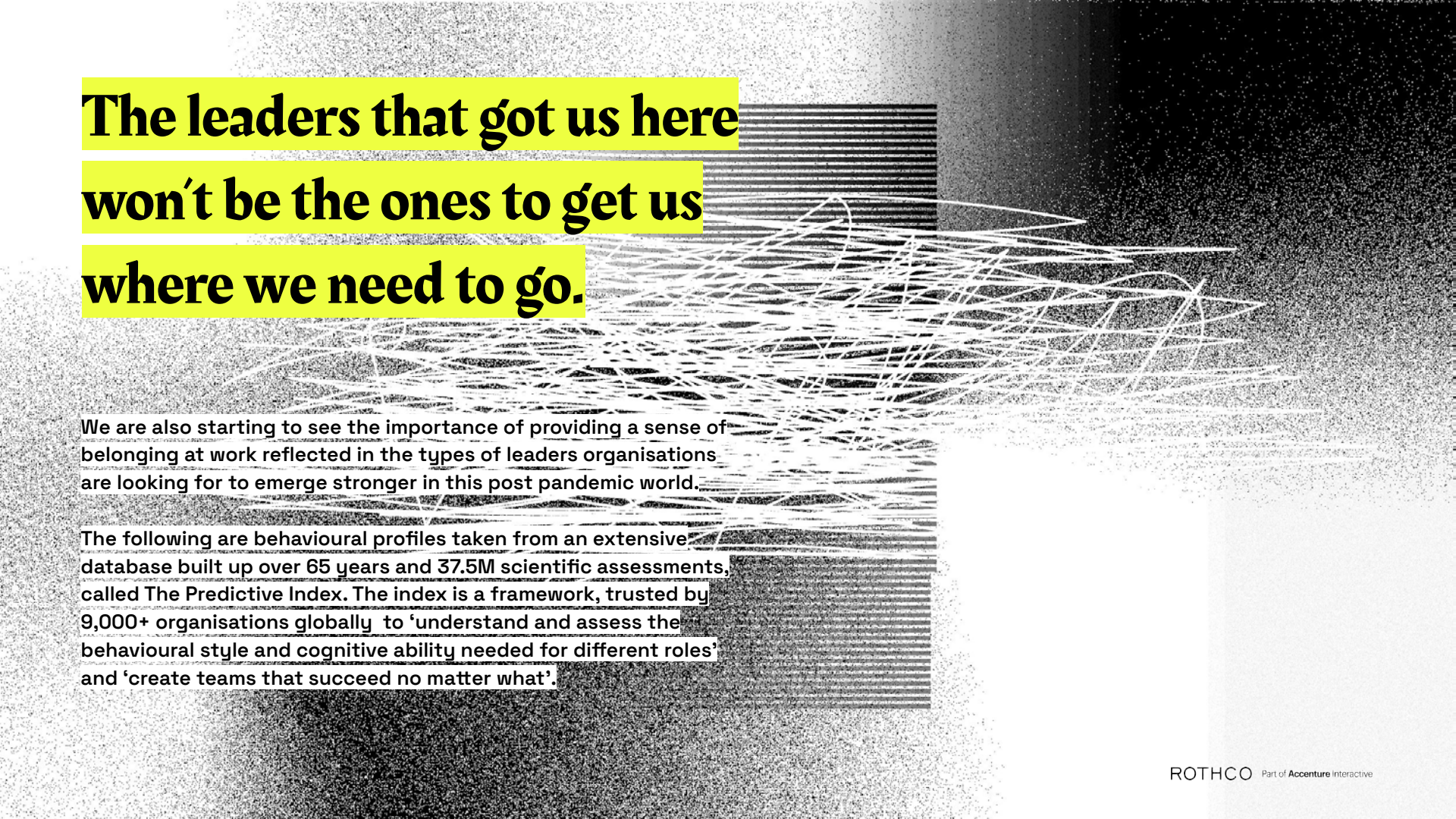
These statistics show the increase YoY in the extent to which Black respondents agreed with the following statements and highlight in plain view the need to approach the return to the office with caution. In the rush to return, we must make sure that no-one is left behind and that we are doing everything that we can to continue to provide all workers with a sense of community and belonging.

1. 'I value the relationship I have with my co-workers'  **28%**
2. 'I am treated fairly at work'  **26%**
3. 'Management is supportive'  **32%**

Black Respondents who agreed with the following statements, Aug 2021 compared to Aug 2020. Source, Future Forum Survey.

"In a way zoom is the great leveller. Everyone's box is the same size, no-one's name is bigger or shinier, everyone messes up the mute button."

Survey Respondent.



**The leaders that got us here
won't be the ones to get us
where we need to go.**

We are also starting to see the importance of providing a sense of belonging at work reflected in the types of leaders organisations are looking for to emerge stronger in this post pandemic world.

The following are behavioural profiles taken from an extensive database built up over 65 years and 37.5M scientific assessments, called The Predictive Index. The index is a framework, trusted by 9,000+ organisations globally to 'understand and assess the behavioural style and cognitive ability needed for different roles' and 'create teams that succeed no matter what'.

The leaders that got us here won't be the ones to get us where we need to go.

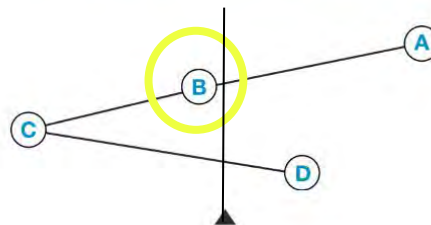
The 'traditional' leader profile shows the most important characteristic was 'A', 'Dominance' - i.e., how assertive, decisive and dominant you are as a leader.

Fast forward to the leader profile organisations are now looking for and the most important attribute here is 'B', Inclusion - i.e., how good are you as a leader at including your colleagues in your vision, at connecting them to a sense of purpose, at bringing them on the journey? As we look at data such as this, we can be assured that fostering a genuine community at work will be high on the agenda for years to come.

Source: Predictive Index

Traditional leader profile

Results-oriented, innovative and analytical with a drive for change.

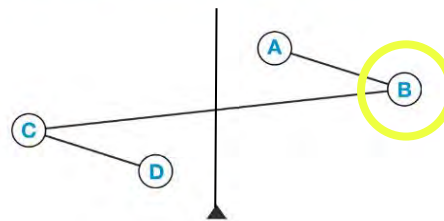


Average Behavioral Pattern



Future leader profile

Risk-taking, socially poised and motivating team builder



Average Behavioral Pattern

A.Dominance

B.Inclusion

C.Patience

D.Formality

The so what?

The rise of the Introvert

As people feel more empowered to put themselves first, how can your brand position their service or product as a way to do just that?

Nichification of Community

Demographics are becoming less and less relevant - how can you start to build more meaningful connections with your audience by tapping into niche communities?

The search for belonging at work

As we 'return to work', do not underestimate the importance of bringing your employees and colleagues on the journey with you and ensuring they continue to feel valued.

implications

1

The system is breaking

The entire global financial system is being challenged. Joining the game now is more valuable than entering too late.

2

Stepping off the treadmill

As the nature of aspiration changes, there's an opportunity for brands to lead that redefinition.

3

Transformative spending

If you want to soak up your share of pent-up demand you need to speak to the transformative power of what you sell.

4

Modern Grannies

They want businesses that provide simple solutions and manage their design to reduce waste. Is there a way your business can facilitate their quiet anarchy journey?

5

Climate Fatalists

The role for brands is to take genuine action and be transparent. Anything less will be treated suspiciously. Be warned this is a growing and challenging audience.

6

Emerging Eco Men

This is the area for brands to be most active, and play an essential role in breaking down the eco-fem stereotype. Create gender neutral opportunities and challenge expectations.

7

The 'I' in community: The rise of the introvert

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The search for belonging at work

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**The world is
demanding
change, the winners
will be those who
can make that
change.**

Final Thought

Change is ever present in our lives, but over the last two years, we've spoken a lot about change being accelerated. Our research bore that out, but more importantly, it showed us that actually most of the radical change we're experiencing now has been a long time coming.

The biggest conclusions to draw from this work is that there is significant disruption occurring in every facet of our lives, and people are pushing back. However, the outtake from all this shouldn't be a gloomy one. Far from it, as we said in the beginning you can view this upheaval as the acts of dreamers looking at the world and dreaming of something better. Chaos creates opportunity, and chaos demands creativity.

For businesses and brands out there, now is the time to build something better, to completely rethink how you engage with your audience, to consider radical new offerings. If this is a world without clear rulers, then the old rules don't apply, and now more than ever, a business or brand has permission to evolve and change radically. The world is demanding change, the winners will be those who can make that change.

If there's anything in this report you'd like
to discuss in more detail, please reach out
to Emma Sharkey, Chief Strategy Officer
emma.sharkey@rothco.ie or Jimi McGrath,
Managing Director jimi.mcgrath@rothco.ie