



Change *Bite*

10 changes for 2009

bates<sup>141</sup>



*“It is not the strongest of the species that survives, nor the most intelligent, but the one most responsive to change.”*

*Charles Darwin*



## Bates 141: Change in the Asias

As the world's largest Asia-devoted communications agency, we exist in the fastest changing, most exciting region on the planet. We recognize that there isn't one Asia, but a multiplicity that we call 'the Asias'. Madison Avenue is a world away and we like it that way.

Operating in today's hyperconnected world means that we are able to monitor global changes and apply them locally. But the really interesting changes are happening right here, in the cities, towns and villages of the Asias. Our Change Agents are on the ground across the region, spotting, understanding and interpreting this constant change.

For more on change, check out:

Website: <http://www.bates141.com>

Blog: <http://changingasias.blogspot.com>



## This is **not** a trends report

Around this time of the year, a lot of agencies publish trends reports. They present emerging consumer behaviors and aspirations, and predict what might become mainstream while it's still niche. Sometimes these reports are right, other times the observations fall short.

At Bates 141, we publish *ChangeBites*. They are quick, digestible, points of view on neck-snapping changes taking place. We use these changes as nuggets of inspiration for finding brand *ChangePoint* opportunities; radical new ways to engage with consumers.

This year we have included *ChangeWords* that capture the language of the reported shifts. These complement our Change A-Z Dictionary published every year.

For a copy of the 2008 A-Z, check out:

Reading Room: <http://www.wpp.com/readingroom>





**WEI-CHI (CRISIS)**  
"Danger Plus Opportunity"

## 2009: A Foreword

Last year's *ChangeBite* captured some fundamental changes that are maturing in 2009, in spite of, or spurred by the global downturn. We documented how China moved 'from farmland to the world stage'; in this edition, we chart how China is using its new-found superpower status to overtake America as the guardian of domestic and global dreams. We also reported how environmental interests were shifting 'from green to blue'; in 2009 we uncover how the continuing growth of eco-consciousness is seen as an opportunity to save money in a change 'from eco-chic to eco-cheap'.

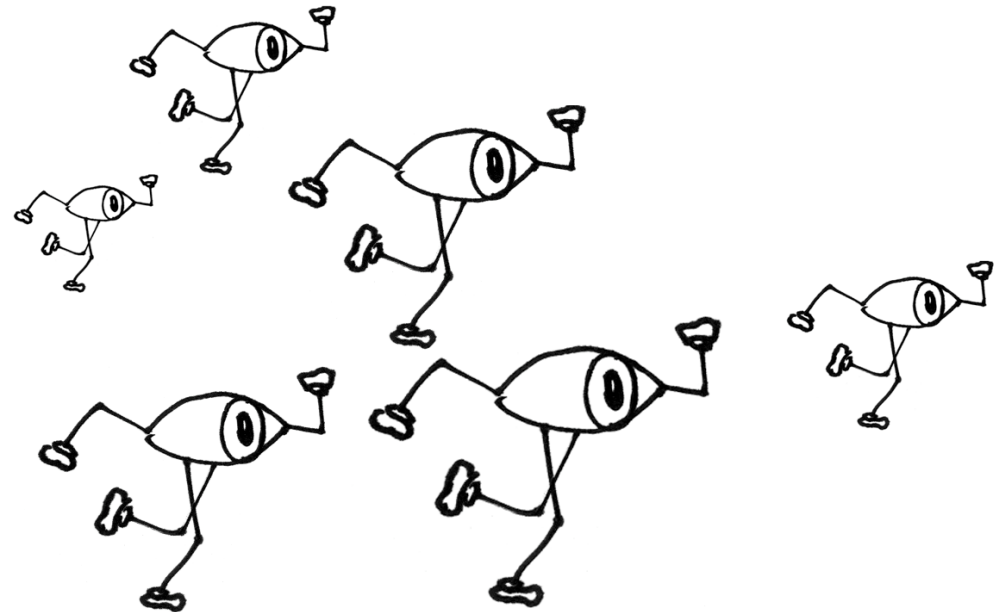
But completely new changes are also surfacing. This year marks a radical transition "from the decade of greed to the age of Obama", new consumption patterns "from eccentricity to sobriety", and a new form of luxury "from Dubai-esque to nondescript".

For many, 2009 will be a tough year driven by the 'Three R's' (Recession, Reduction, Retrenchment). Our point of view is that the changes will also present unforeseen opportunities for marketers. As the Chinese character for "crisis" indicates, there is both 'danger' and 'opportunity' in times of trouble.

Previous downturns have produced vast swathes of creativity, and many companies have flourished through them. There is no reason why, armed with the right information, and changes, brands cannot seize *ChangePoints* and take a leadership role in 2009. To find out how, read on...

# Top 10 Changes for 2009

1. From the decade of greed to the age of Obama
2. From the American dream to the Chinese dream
3. From eccentricity to sobriety
4. From Dubai-esque to nondescript luxury
5. From eco-chic to eco-cheap
6. From concrete jungles to urban gardens
7. From high-rollers to playing it safe
8. From attitude to gratitude
9. From high tech to slow tech
10. From second life to augmented reality



Reskinned reality

Virtual aesthetics

3D advertising

Voluntary **simplicity**

**Slow tech**

**Augmented reality**

Internet of things

Voluntourism

Rustic

**Simplified life**

ARG

Serious game movement

Dematerialized world

Goodism

**Calm tech**

**Rationaissance**

New era

Prosperity reach

Goodvertising

**Micro-fundraising**

Flash causes

**Mattress Culture**

Watchful markets

Era of responsibility

Big Givers

Insurance boom

Politics as a cause

Upbeat

**Gratitude**

Thrifter behaviors

Plastic aversion

Inspired youth

**A e of Ob ma**

**2009**

Playing it safe

Rental culture

Can-do culture

Hope

Saving

Risk-averse

**Pleasure periphery**

BYD

**Chinese dream**

**Eco-cheap**

Blackle

Voucherista

**Coolturalism**

China Pride

Green March

Eco-drive

Eco-watt

Roof gardens

**Nondescript**

Back to basics

Eco-Absorbed

**Ikearchitecture**

Green Rooftop

**Back to luxury classics**

**Monochromatic**

**Sobriety**

Urban farms

Farmlands

Agro-housing

**Bespoke Luxury**

Credit munch

Unfancy food

Guerilla Gardeners

**Urban gardens**

Bioclimatism

**Private moments**

Neutral

Back to basics

Agritecture

Underground farms

Vertical farming

**Status puns**

**Lux overdose**

Weightless

Green walls

Air Trees

Green spaces

Edible landscaping



# From the Decade of Greed To the Age of Obama



## The Change

*The Asias have been at the forefront of a decade of greed. Lifestyles were sustained, and ambitious development projects were realized, thanks to borrowed money and unsustainable consumption of natural resources. Like the rest of the world, the Asias are now feeling the effect of a collective global greed; stock markets are in freefall and exports are down, some Asian economies have succumbed to the official “recession” reality.*

Enter Barack Obama. His victory in the US election marks more than the ascension of a new American politician; he is the icon of a new era. The Age of Obama is seen as a new beginning, new hope for the environment, for international relations, for youth, and for minorities. It is an Age that far transcends Obama the man, and in doing so, is heightening ambitions throughout the Asias.

## The Decade of Greed

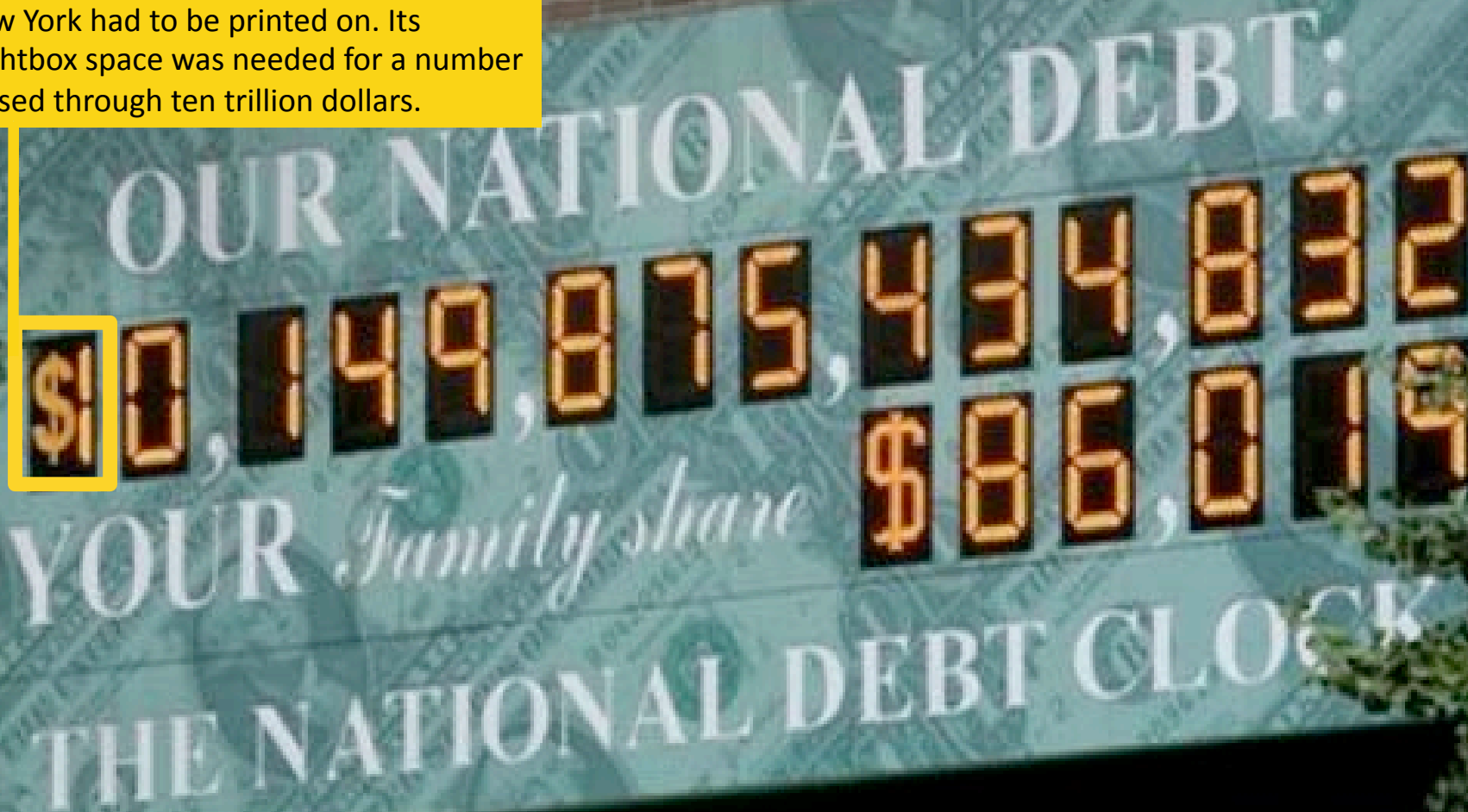
The last 10 years were marked by record-breaking economic indicators, seen by many as signs of excess and greed.

Between 1998 and 2008, oil prices rose 700% to \$147 as demand outstripped supply. In the same period household debt in the US doubled to \$15 trillion. Even today, the war in Iraq continues to cost taxpayers \$17 million every hour.

Ten years ago, sub-prime mortgages didn't exist, yet they grew to account for 21% of all mortgages issued in 2007. The same year, a single bank paid a staggering \$14 billion in bonuses to just 25,000 staff, averaging more than half a million dollars each.

## The Decade of Greed

American hunger for credit meant that in October 2008 the dollar sign on the famous national debt clock in New York had to be printed on. Its previous lightbox space was needed for a number as debt passed through ten trillion dollars.





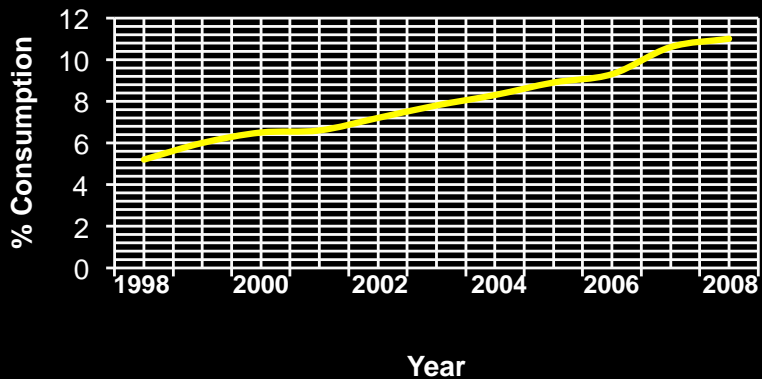
# Consumption in China: out of control

Asian countries were at the forefront of the decade of greed.

In 2008, China replaced America as the world's biggest producer of greenhouse gases. Its insatiable demand for oil and natural resources tripled since 1998 in order to fuel ambitious projects, such as the most expensive Olympics ever staged and the construction of the biggest airport terminal in the world.



## Percentage of global oil consumption from China



The equivalent of four Manhattans are built each year in China.

A woman with long dark hair, wearing a black hoodie and dark pants, is seen from behind, looking at a display of shoes and handbags on shelves in a store. The shelves are light-colored and the background is a light blue wall. The woman is holding a shopping bag in her right hand.

## Yue Guang Zu

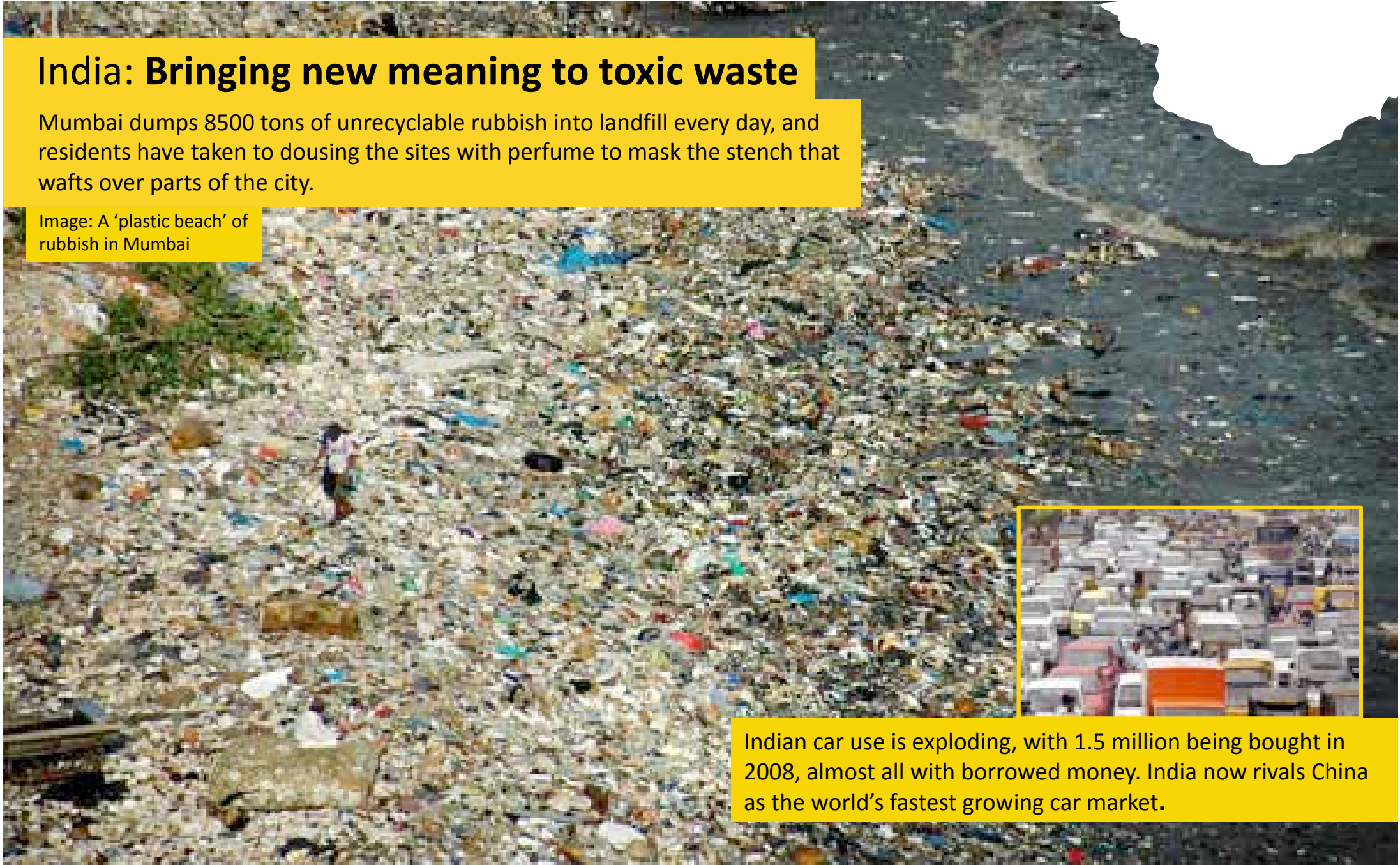
is Chinese for 'Moonlight generation' which refers to the segment of Chinese youths who spend every single penny they earn each month, and borrow more to spend on luxury goods.

In large cities like Beijing and Shanghai, young white collar workers are well-known for their ability to overspend. A recent Shanghai Government survey revealed that office workers in the city spend an average of 2,500 yuan per month – almost double the total average monthly income in China.

## India: Bringing new meaning to toxic waste

Mumbai dumps 8500 tons of unrecyclable rubbish into landfill every day, and residents have taken to dousing the sites with perfume to mask the stench that wafts over parts of the city.

Image: A 'plastic beach' of rubbish in Mumbai



Indian car use is exploding, with 1.5 million being bought in 2008, almost all with borrowed money. India now rivals China as the world's fastest growing car market.

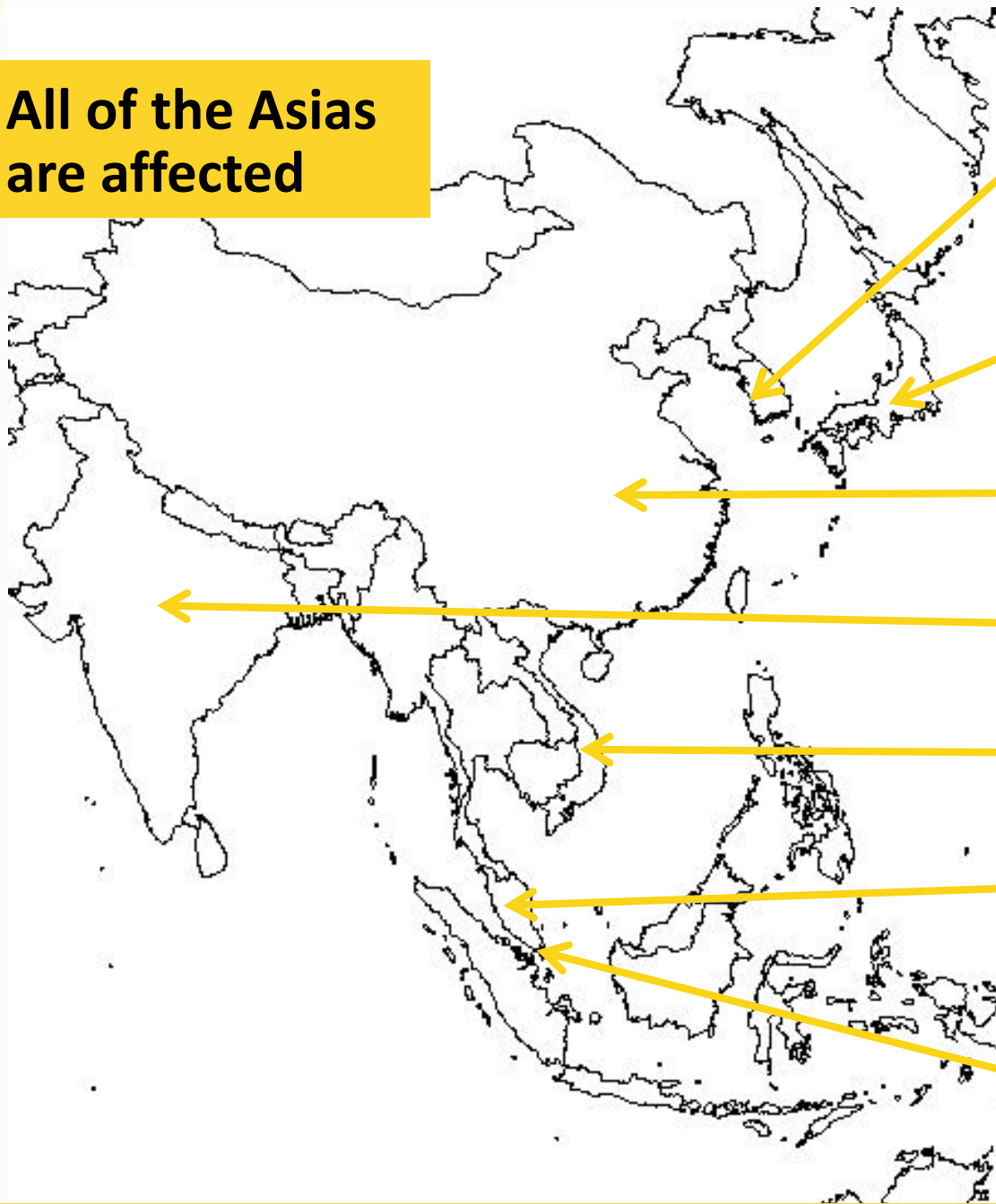


**APAC is now feeling the effect of economic meltdown**  
 Hong Kong's Hang Seng index: January 08 – January 09

@advfn.com



## All of the Asias are affected



### S. Korea

- Has one of the largest per capita debts of any Asian country
- A quarter of its exports dependent on US and European trade

### Japan

- Sony's quarterly profit ending 2008 fell 72%
- Huge job losses expected due to auto and electronic industry slowdowns

### China

- Projected growth of 8% in 2009, the lowest rate for a decade

### India

- Projected growth of 7.5% in 1<sup>st</sup> quarter of 2009 from 9% last year

### Vietnam

- Projected 13% export growth in 2009, down from 29.5% in 2008

### Malaysia

- Projected 3.5% growth in 2009, the lowest rate since 2001
- Suffering fall in operating revenue from the decline in prices of crude oil

### Singapore

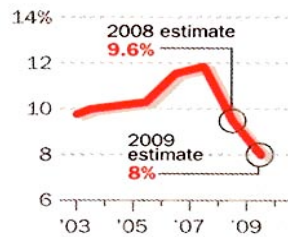
- Fell into recession in Q1 2009

# The situation will be exacerbated by reliance on exports

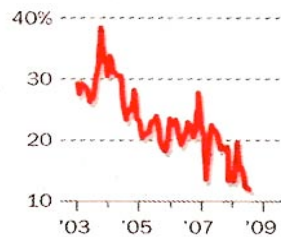
## Cooling Trend

A falloff in exports is impacting China's torrid economic expansion

### GDP growth



### Export growth



Sources: National Bureau of Statistics; World Bank; CEIC data; UBS

The world's busiest container port, Singapore, grew by 7.1% in 2008. But the government expects that 2009 will be the port's first year of negative growth since 2001.

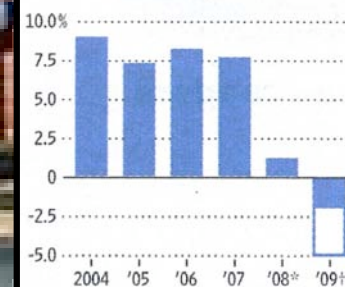
## Exports as a percentage of GDP



Source: Asian Development Bank

## Grim outlook

Singapore's government sees its annual GDP falling between 2% and 5% this year. Year-to-year percentage change:



\*Estimate †Forecast  
Source: Singapore government

## 2009: The Age of Obama

In January 2009, in front of a crowd of millions and TV audience of billions, Barack Obama was sworn in as President of the USA. His arrival marks more than the presence of a new world leader; it is the dawning of a completely new global era.

Obama embodies new global aspirations, and critically, a shift away from the preceding decade of greed that has caused so much harm.





# From to politician to international hero



To capture the seismic global importance of Obama's victory, the New York Times used a 96pt font for a headline - only the 4<sup>th</sup> time in the 158 year history of the paper.




Obama was Time's 'Person of the Year' and even appeared on the cover of Spider-Man.

Press in the Asias reflect the new global era

**Obama reaches out to world**



**INDIA**



**OBAMA FIRST AFRICAN-AMERICAN PRESIDENT SONG AND DANCE AROUND THE WORLD**

**DEMOCRATS EXTEND CONTROL OF CONGRESS**

**MALAYSIA**



**黑人總統**


**TAIWAN**

*"First black President"*

**ABDULLAH: ANYONE CAN**

It is possible for anyone from a minority group to be a nation's leader, the Prime Minister said while congratulating Obama on his election victory >NB

**THE GLOBE JOINS IN CELEBRATIONS**



**PHILIPPINES**

**Thousands of kilometers away, a city rejoices**



**JAPAN**

**हाँ, पाल्तालें ओवामाई**

राष्ट्र के भेदाभेद मुझे निरो इतिहास के सङ्गपूरण



**INDIA**

*"Yes, Obama changed it"*

**A DREAM ALIVE IN OUR TIME**

45 years after Martin Luther King had a dream, America wakes up to a new dawn

**INDIA**

**Obama will be positive for Asia: Eco**

**SINGAPORE**

**World awaits new era in the U.S.**



**INDONESIA**





## From politics to cause

This age marks an evolution from politics as a badge that was worn to politics as the biggest cause of them all. Now, causes are disseminating across borders and cultures to fuel positivity and unite people in a solemn world.

Billions championed Obama's cause, and victory was met with relief and elation in equal measure.



In 2009, the Age of Obama, the cause is as simple as they come: **CHANGE.**

# The world is infected with this hope

Friends of the Earth in the UK said that the planet had “a much greater chance of success” thanks to Obama

“This is the fall of the Berlin Wall times ten”, said French junior minister Rama Yade

Packed bars in Beijing served red, white and blue cocktails.

Voter turnout in the US election was the highest for 40 years

In Cuba, Fidel Castro said that Obama would “increase the peoples’ opportunities to progress”

Michelle Bachele President of Chile wrote, “the world is now ripe for a renewed multilateralism”



The fishing village of ‘Obama’, Japan played live Rock ‘n Roll all night

In Jakarta (where Obama lived as a child) thousands partied in the rain, chanting “Obama! Obama!”.

MTV Australia is energizing the nation’s apathetic youth by broadcasting Obama’s inauguration ball, featuring live music and a satellite linkup to Kenya

Over half the babies born in Kenya on the day of Obama’s victory were named either Barack or Michelle Obama.

Nelson Mandela wrote that now, “no person anywhere in the world should not dare to dream”

Afghan President Hamid Karzai said “the world has entered a new era, where colour and ethnicity disappear.”

## Hope for a more inclusive world

“In an interconnected world where people in the farthest reaches could monitor the presidential race blow-by-blow, many struggled to put into words their sense that Obama’s election marked an important turning point.” Associated Press

“The world, from Alaska to Indochina, is inhabited by men and women who, like Barack Obama, believe that peace, a balanced ecosystem, equity and diversity are possible...We are ushering in a new world in which social integration is the norm”. Andrew Lam, North American Media

“I really think this is going to change the world” Akihiko Mukohama, lead singer of Anyone Brothers Band in Japan

“Obama represents hope, renewal and proof that the barriers of age, class and race could be transcended.” NPR

Image: Almost a quarter of a million people lined the streets of Berlin to see Obama. They roared when he stated “I am a citizen of the world”.



# Hope for the environment



“This is a huge signal of encouragement for the whole international community.” Yvo De Boer, head of UN Climate Change Secretariat, after Obama agreed to sign a pledge to reduce CO<sub>2</sub> emissions sharply by 2020

“If he is prepared to make...a bold commitment [to climate change] he will become a hero of the planet, for good.” John Schellnhuber, Leading Climate Scientist

“I believe that we could be entering a transformative era for environmental politics.” Joe Klein, Time

Obama has pledged to reduce US CO<sub>2</sub> emissions 80% by 2050, and to make the US “the world leader” on climate change.



# Hope for the youth



Obama reached out and inspired the youth to unite around a cause more than any politician in living memory. Official YouTube videos were viewed 110 million times, and tens of thousands of vloggers added their own.



Under 30's created more Obama content than one person could consume in their lifetime. This included videos, poster designs, and even music. iTunes has released an album of the best tracks that were created to show support for Obama.



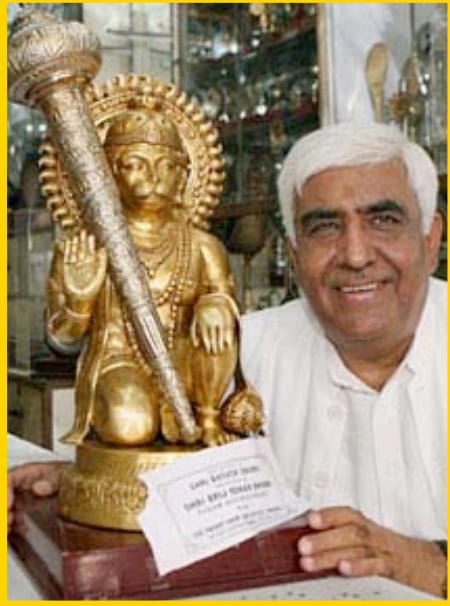
Obama amassed 600,000 messages of support from 3.8 million (and rising) Facebook fans. They hail from every continent on earth.



7 million more under 30's voted in this election than the previous one in 2004. Of those, almost 70% voted for Obama. The BBC polled youths in 22 countries, and found that in every single one, Obama enjoyed support over his rival.

## This hope resonates in the fast-changing Asias

Brij Mohan Bhama is a member of India's congress party. He presented Obama with a 2ft tall solid brass 'monkey king' charm, saying that "he [Obama] will be good for India."



BHAMA  
FOR  
OBAMA

Having been touched by terrorism in 2008, Indians are hoping that the Age of Obama will lead to reforms closer to home. The hot topic on Indian TV in 2009 is "When will India have its own Obama?"

## Qián Jìn

The Age of Obama is not lost on the Chinese either. Translated as 'forge ahead', this mandarin adaption of the now iconic Obama artwork shows that now more than ever, China is hopeful that her ambitious targets for development can be met.



# ChangeWords



## Obamamania

Is the hysterical global reaction to Obama's victory. Billions supported his campaign, and rejoiced when he was announced as the victor in the contest.

## Moonlight Generation

Is the generation of Chinese youth who spend way beyond their means – often using borrowed money and credit cards to buy luxury goods.

## Disco-bama

Is the name given to all the spontaneous parties celebrating Obama's rise to the top. On Inauguration day, thousands of these parties were held across the world.



## Brand **ChangePoint** Opportunity

Although the media reports doom and gloom across the world, there is an appetite amongst consumers for positivity. The Age of Obama is inspiring people to have a point of view, see a better future, and to be the change that they want to see.

Brands can capitalise on this change by changing the tone first and foremost - adopting a more hopeful discourse. Upbeat optimism will gain positive support from consumers who are continuously bombarded with messages of 'crisis' and 'meltdown'. But brands need to also put their marketing dollars against tangible actions. What if Bank of America sponsored shelter programs for those who defaulted on their mortgages, instead of running a multi-dollar corporate ad campaign? And similar to Obama, by using social networks and viral marketing to champion a cause, brands can ensure that they don't just join a debate, they actually own it.

# From the American Dream To the Chinese Dream



Adbusters, 2007



## The Change

*Throughout the twentieth century and beyond, the American dream captivated an entire planet. It was the land of opportunity, a place where anything could happen.*

Now, the American dream is under threat. Its economy is in recession, homes are repossessed, corporations need bailouts and men in their thirties are earning less than their fathers did. Compounding the problem is an over-regulated business environment that stifles entrepreneurialism.

The new home of can-do culture is China. The nation's explosion onto the world stage at the Olympics signaled the arrival of a superpower. This year, China will prop up the world economy, and unlike before, China now looks to itself for inspiration. In doing so it is capturing the dreams of billions at home and abroad.



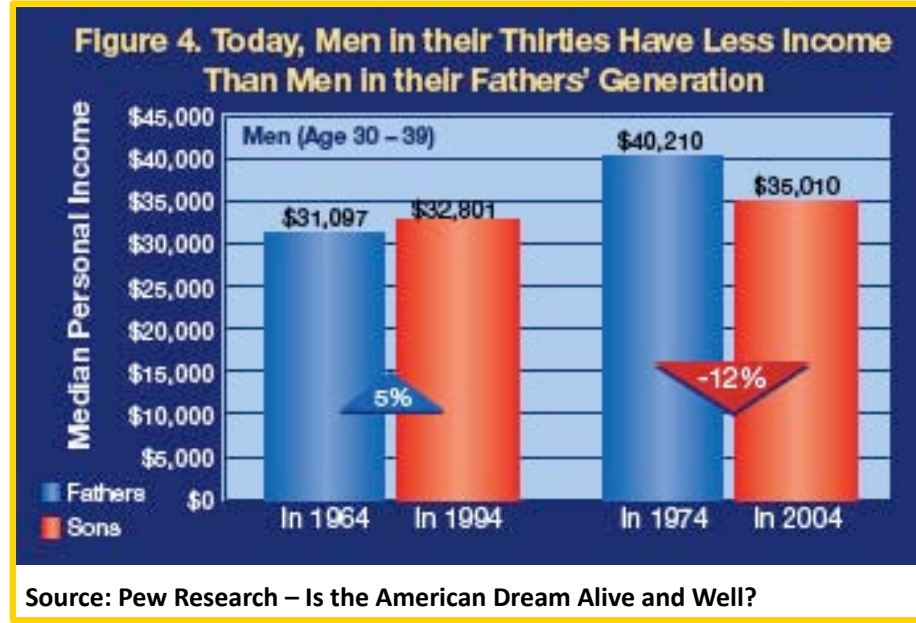


**“What I have witnessed in China is a proud people, ignited by a hunger to succeed, savoring the fruits of their confidence – a bold declaration of a collective can-do that comes only to those who dare to dream and believe in it.”**

Debasish Roy Chowdhury, China Daily

# In recent years, the American dream has taken a blow

While the Age of Obama marks a global shift in attitudes towards politics, consumerism and the environment at large, at the same time the prominence of America is now challenged.



# But for hundreds of millions of Chinese, the dream is just beginning

China is no longer known as 'the next super-power', it has now arrived fully on the world stage.



'This is China's way of saying "yes we can!"'  
– China Daily, 24<sup>th</sup> August 2008

MEDAL TABLE				
	Gold	Silver	Bronze	Total
China	48	14	19	76
USA	26	26	27	79
Great Britain	16	9	8	33
Australia	11	12	13	35
Germany	11	8	9	28
Russia	10	14	18	42
South Korea	8	10	6	24
Japan	8	6	8	22
Italy	6	6	7	19
Ukraine	5	4	8	17
France	4	11	14	29

For the first time since the cold war, the US did not top the Olympics medal table.

## Fueling the world economy in 2009

In 2008, China became the biggest contributor to global economic growth. This year, the world is looking to it for help lifting nations out of the current downturn.

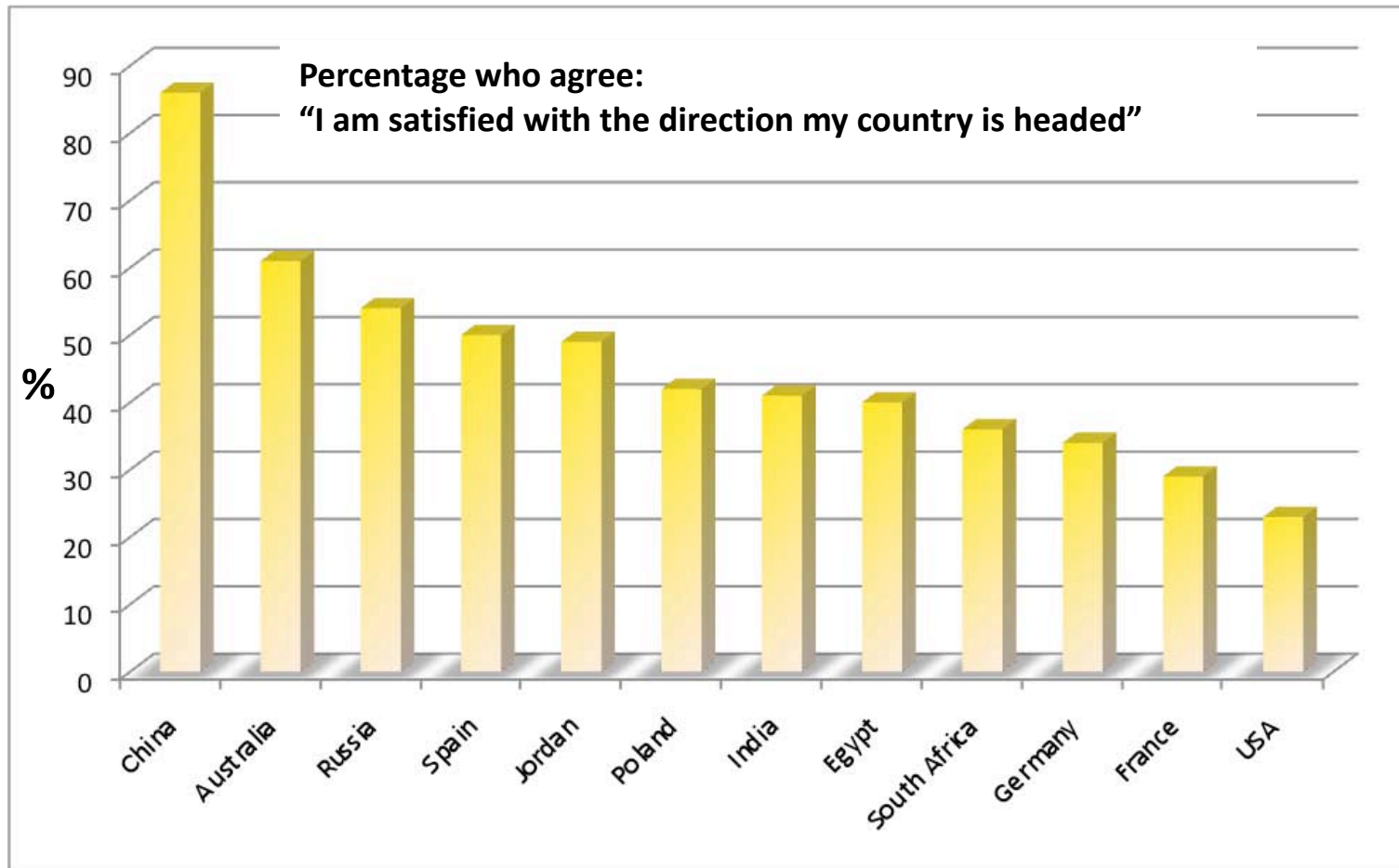
Although China is not immune from this downturn, Merrill Lynch estimates that in 2009, whilst the US is in recession, China will provide 40% of the entire planet's GDP growth.

Bloomberg reported in January 2009 that China had overtaken the UK, France and Germany to become the world's third largest economy. It is now 70 times bigger than when leader Deng Xiaoping ditched hard-line policies in favor of free-market reforms in 1978.



# Positivity rules in China


A recent study by Pew Research shows that an astonishing 86% of Chinese are happy with the direction their country is headed, up from 48% in 2002 and more than any other country in the world. In the US, however, only 23% are as happy.



Source: Pew Research, 2008

## Driven to build a better future

The Chinese Lunar New Year is one of the largest human migrations on the planet. Hundreds of millions of Chinese return home to their villages from the cities that they have chosen to work in so that new generations can share in China's prosperity.

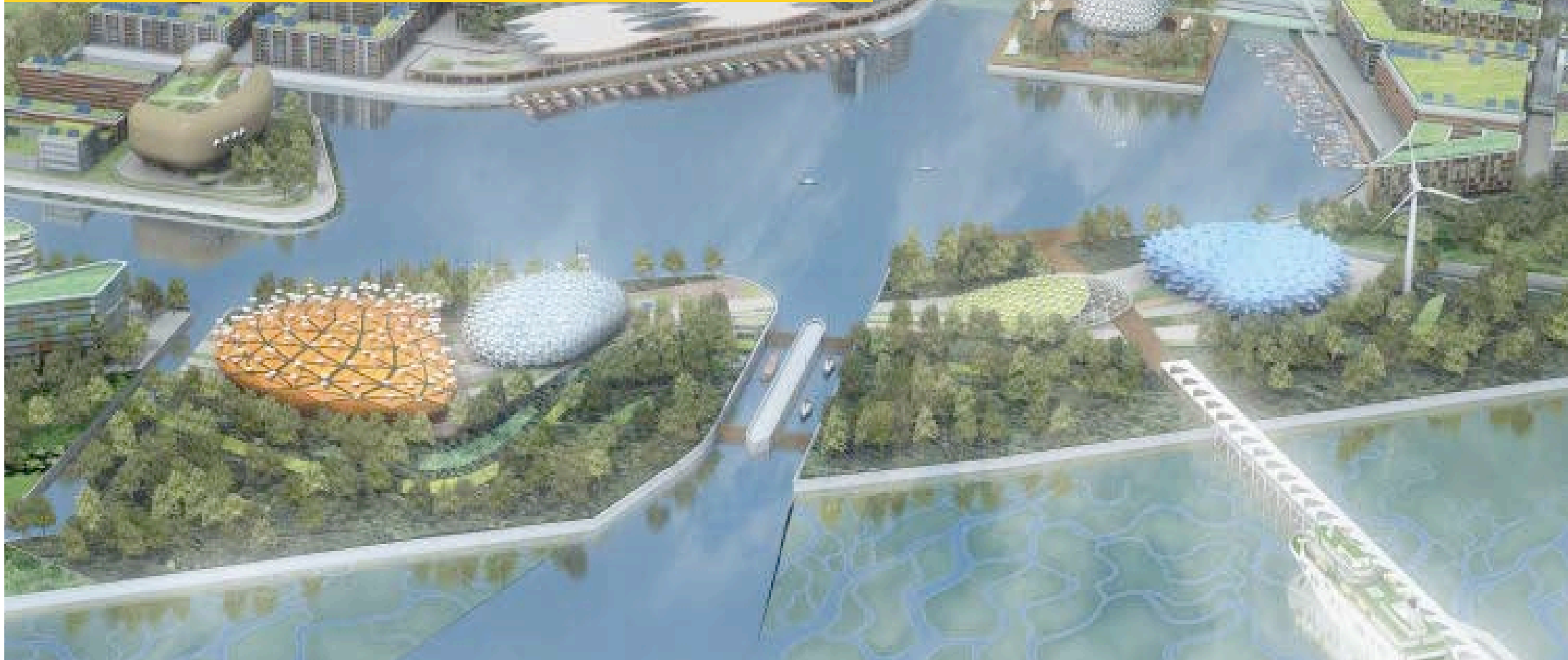
An aerial photograph of a sprawling Chinese city, likely Shanghai, showing a dense concentration of high-rise apartment buildings and commercial structures. A wide river, possibly the Huangpu River, winds through the city. In the background, hazy mountains are visible under a bright sky. The overall scene conveys a sense of rapid urbanization and economic growth.

Zhou Shouheng is the 'embodiment of what was once called the American Dream but might now be renamed the Chinese Dream'. He works on building sites in Beijing, ten hours a day, seven days a week, 50 weeks of the year. He does it for his children... *"I hope that one day they can design great buildings, not just build them like me. The fancy apartments and swish cars of wealthy Beijingers merely inspire me to work still harder"*.

Source: The Times 'The Chinese Dream has replaced Americas'.

## Driven to build a better future

As the Chinese move to cities in search of a better life, the government is taking steps to ensure that positive and harmonious environments are built. China is now home to 120 Mega-cities of more than 10 million inhabitants each, and developers are building more than People's Parks to improve lifestyles. Cities such as Dongtan (pictured) are leading the world in sustainable development.





## Taking pride in their own

For years China has been famed for its ability to copy desirable goods invented in the west, from the HiPhone imitation of an iPhone, to the Hongqi HQD which bears a striking resemblance to a Rolls Royce.





## Taking pride in their own

However, enormous advances in education and investment in technology, research and development mean that China now has the tools to be at the forefront of innovation, developing cutting-edge products of its own for domestic and international markets. China is beginning to look to itself for inspiration.



A laboratory in Shenzhen designs, tests and manufactures high speed fibre-optic cables.

## Choosing Chinese

In a marked change, Chinese consumers no longer exclusively aspire to western lifestyles and instead express their good taste and national pride by choosing to purchase Chinese brands.



# Choosing Chinese

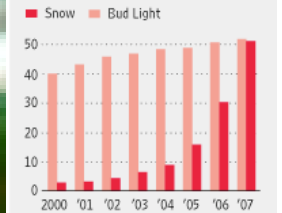


Home-grown computer brands Lenovo and Hasee accounted for more than half the Chinese notebook sales in 2008.

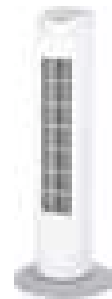
Thanks to strong domestic sales, Snow lager surpassed Bud Light in 2008 to become the world's most consumed beer.



**Battle of the Brands**  
Top two beer brands by global sales volume, in millions of hectoliters



Source: Plato Logic



Chinese appliance maker Midea plans to take the battle to its Korean and Japanese rivals in 2009, by opening 50 stores in Beijing by July.

## Choosing Chinese

Similarly, foreign brands wishing to succeed in China can no longer export global advertising campaigns if they wish to attract consumers. They must position themselves as woven into the fabric of Chinese society.



Christian Dior launched a traveling exhibition of Chinese Artists including Quentin Shih, Zhang Xiaogang and Wang Du. The work explores the beauty of French fashion through Chinese eyes and is currently on display in the Ullens Centre for Contemporary Art in Beijing. This is a stark contrast to previous advertising campaigns featuring Giselle, a caucasian supermodel.



## Choosing Chinese

In 2009, Starbucks will launch a new brand of coffee grown by farmers in China – a first for the company. Starbucks said that after distributing the drink across the country it hopes to bring the blend to stores all over the world.

In 2008, Starbucks opened 40 new stores in China, whilst announcing plans to close 600 in the US. Chinese expansion will continue in 2009.



星巴克咖啡

## Foreign brands are clamoring for a piece of the action


American Apparel, which made its name in the US largely because it bucked the market trend and did not manufacture products in China, has now launched in the country.



American Apparel in Shanghai

## Exporting China pride to the world

No longer does China solely export manufactured goods designed in the west. As confidence grows in China, local brands are putting their stamp of the world by launching in the markets they used to idolize.

A photograph of Shaquille O'Neal sitting on a red, tufted couch. He is wearing a white t-shirt with a red dragon logo and white shorts. He is smiling and looking towards the camera. He is wearing white and red Li-Ning sneakers. He is holding a gold and red Li-Ning sneaker in his hands. The background is dark and out of focus.

In a first for China, the sportswear brand Li-Ning has chosen to raise its brand awareness overseas and compete against Nike and Reebok through sponsorship of US NBA star athletes Shaquille O'Neal, Damon Jones, and Chuck Hayes. This takes advantage of China's new-found status as a respected sporting power following the Olympic Games in Beijing.

## Exporting China pride to the world

Chinese car manufacturer Geely expects to buck the downward trend in the auto category and increase sales by launching 7 new low-cost models into emerging markets such as Vietnam and Malaysia.

In 2008, Geely Auto saw domestic sales increased by 11.6% whilst exports of its cars were up by 79.8%.



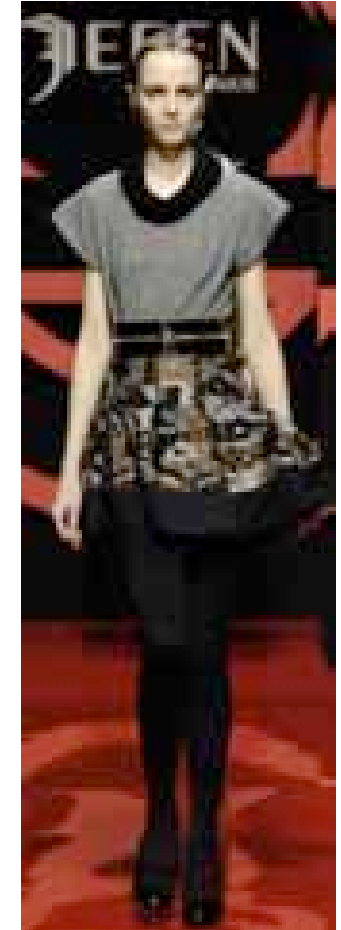
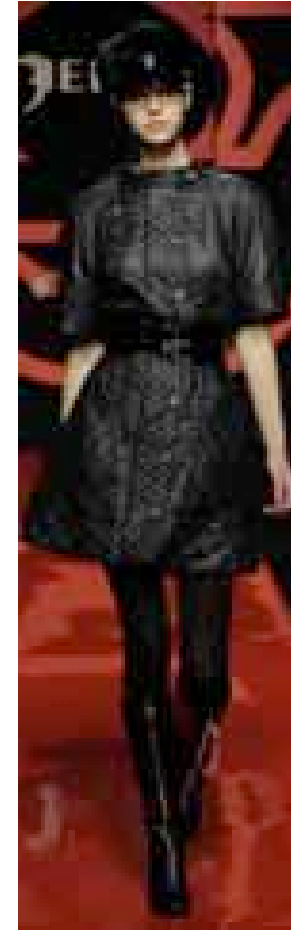
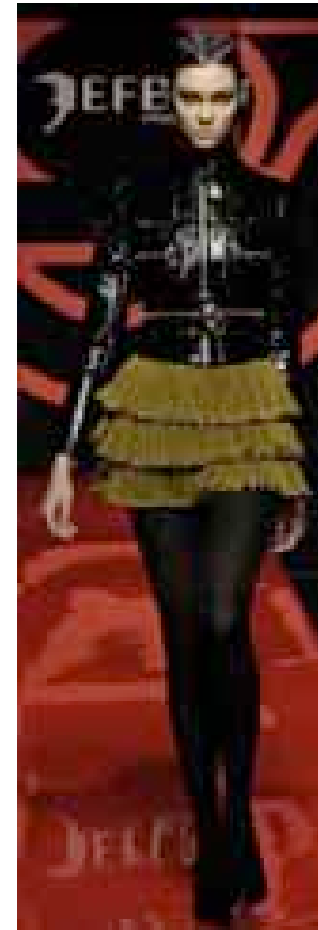
Wahaha drinks successfully launched across the Asias, and are now hoping to gain a foothold in the US market by distributing through Asian stores.





# The Great Catwalk of China

Chinese couture has taken the fashion world by storm, with designers such as Mark Cheung, Zhang Zhaoda, Jefen and Li Xiaoyan all receiving praise and attention from international fashion houses.



Jefen wows at the Paris fashion show

## China: The new home of can-do culture

Perhaps no company embodies the spirit of the new Chinese Dream more than BYD, or “Build Your Dreams”.

The Shenzhen-based company rose to one of the world’s largest manufacturers of mobile phone batteries. BYD now plans to use its experience in battery making to become the world’s dominant electric car maker, launching models in China before the end of the year followed by the US and Europe in 2010. Their vision so impressed the greatest investor in living memory, Warren Buffett, that he invested \$230 million in the company for a 10% stake.



As American carmakers request government bailouts to stay afloat, BYD unveils new models at the 2009 Detroit Motor Show.

# China: The new home of can-do culture

The anything is possible outlook of the Chinese is increasingly attracting foreigners who want to become part of the Chinese Dream through realizing their own.

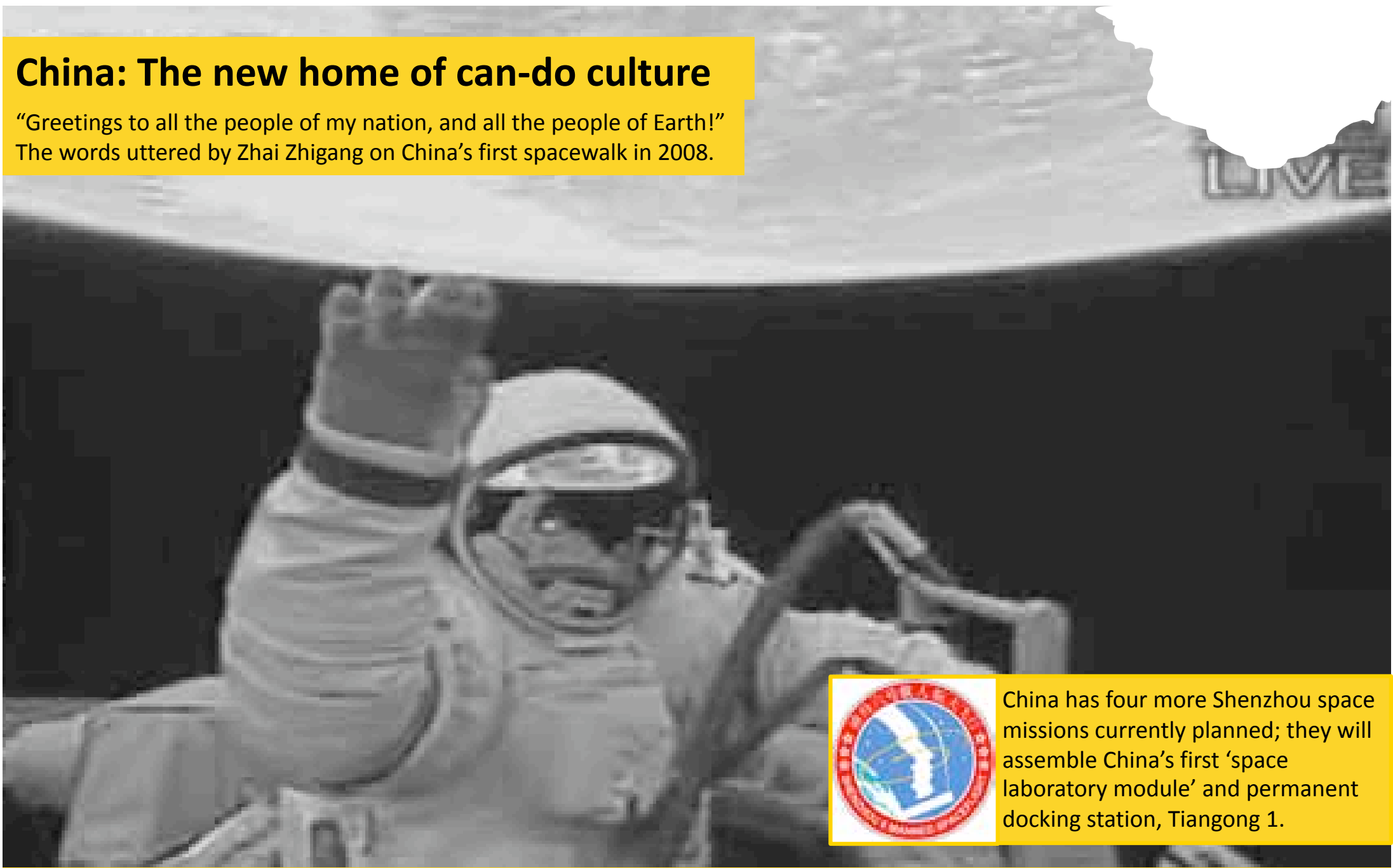


American Gage Galinger founded his gaming company, Possibility Space, in China after finding that Americans overregulate, overthink and overplan. He is now saying that developers in China are better than any team he has worked with in the US by an 'exponential factor'. Source: China Vortex

Dutch architect and urbanist Rem Koolhaas went to China to fulfill their vision of the enormous CCTV headquarters in Beijing – not New York.

## China: The new home of can-do culture

“Greetings to all the people of my nation, and all the people of Earth!”  
The words uttered by Zhai Zhigang on China’s first spacewalk in 2008.



China has four more Shenzhou space missions currently planned; they will assemble China’s first ‘space laboratory module’ and permanent docking station, Tiangong 1.



# ChangeWords



\* Coined by Bates 141

## BYD

Is the corporate embodiment of the Chinese Dream. Meaning 'Build Your Dreams', the company invested the profits in its cellphone battery business into R&D to become a major player in the emerging electric car market, even attracting the attention of Warren Buffet.

## Snow lager

Is a Chinese beer that has become the world's best-selling lager, having overtaken Bud Light in 2008. This is based almost solely on domestic sales.

## Tiangong 1

Is to become the permanent home of China in space. It is a 'space laboratory module' that is being built in space by China's 'Shenzhou' space programme.



## Brand ChangePoint Opportunity

Although China is not immune from the economic meltdown, it has become the new home of the can-do culture globally.

Now is the time for Chinese brands to celebrate their country's achievements and to encourage local entrepreneurs (e.g. via branded grant programs) to produce cutting edge ideas that will become the new global icons. Meanwhile, international marketers must forgo the centralized marketing approaches that assume campaigns and products can be merely "localized" for success. Starbucks paid a high price before it realized the need to brew 'made-in' China coffee. To succeed in today's Chinese market, brands need to know not just how to position their products, but also who to enlist to talk about them. Chinese influencers as brand champions are the best way to ensure that brands connect with billions. Forget Giselle!



**From eccentricity  
To sobriety**



## The Change

*Throughout the decade of greed, and for the past few years in particular, eccentric fashion tastes, design trends and eating habits have dominated. Eating out and consuming peculiar value-added food became the norm, as did fluorescent colours and pimped out pads.*

This year, consumers are looking for ways to save money and tone down excess. Sobriety will enter the fray and transcend everything from the colours and fabrics used by fashion houses to the food people eat and the architecture they aspire to live in.

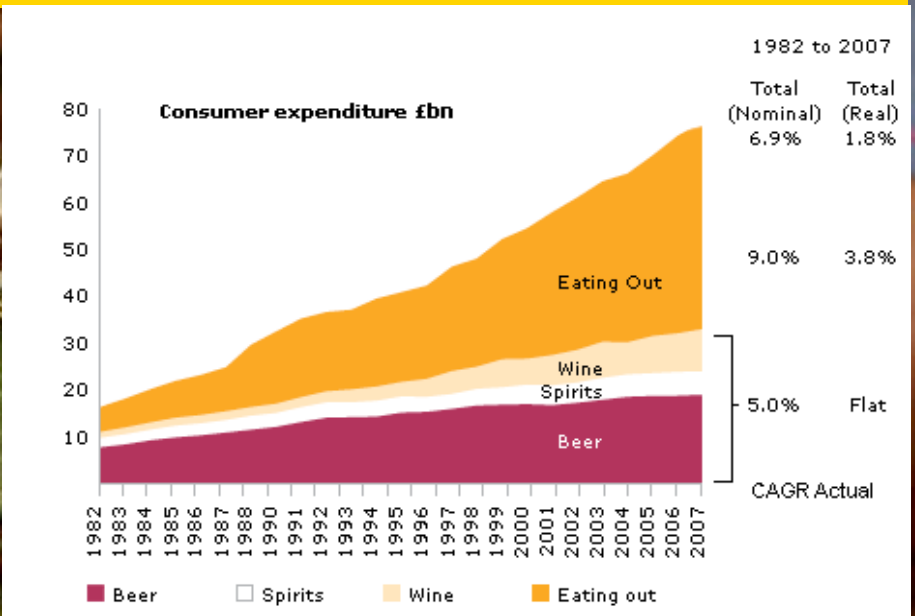
# Return to simple pleasures

Eccentricity ruled for much of the decade of greed. Outlandish fashion, ostentatious meals and peculiar value-added products were societal norms.

However, lifestyle expectations and priorities have changed, and in the current economic climate, consumers are increasingly seeking life's simple pleasures.



UK consumers reflect the global increase in restaurant culture.



Source: Mitchells and Butlers



## Cooking from scratch will make a comeback

Gone are the days of premium ready meals and regular dining out. According to Nielsen, sales of raw cooking materials are on the rise as shoppers buy more flour, shortening, oils, and even canned supplies.

Although the motivation may be cost savings, many families will find that cooking from scratch is also a step up in both taste and nutrition. "Credit munch" is here to stay.





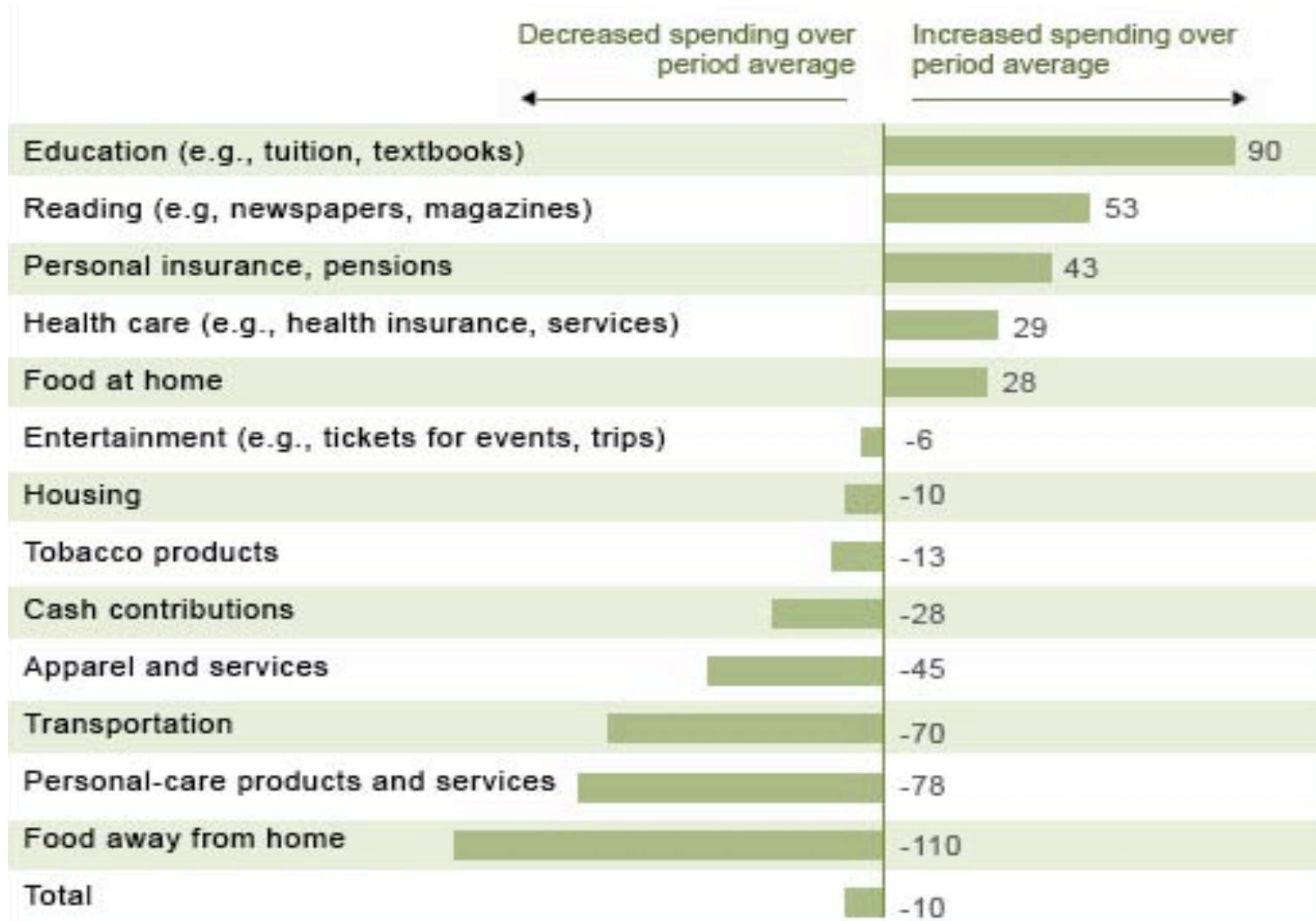
## Unfancy food is on the rise

From Coke with added vitamins to chocolate bars with an energy boost, the past few years saw an explosion of value-added food and beverage products. Now, the return to the kitchen will signal a shift in consumer's attitudes to food, and wholesome, natural produce will again be seen as the most healthy choice.

The second annual "Unfancy Food Show" a celebration of handmade, unfussy food, was held in New York last year. Visitors could sample goods from nearly 20 of the area's best "unfancy" producers. Treats included country pâté with wild ramps, blackberry ice cream, and direct-trade, stone-ground organic chocolate.



# Consumers are going 'back to basics'



Source: McKinsey report on US consumer spending during previous downturns

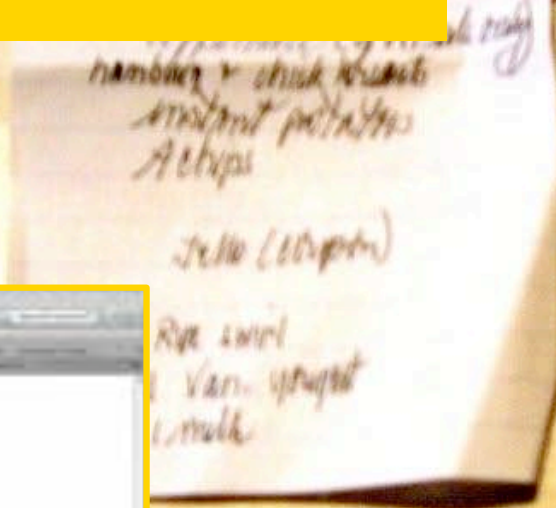


## Voucher culture will take off

Voucheristas are an emerging group of people, described as 'shopping warriors' who clip, download and share vouchers in order to save money on their shopping. Voucheristas are now setting up their own websites in order to share tips as well as vouchers with each other.



Vouchermate and Food Freebies are both examples of websites where consumers share money-off coupons in order to 'save yourself rich'. Many more websites such as these are expected in 2009.





# Recycled and second-hand will be cooler than ever

Vintage and second-hand products have been growing in popularity for some time now. But the desire amongst consumers for basic fashion will see an explosion.



Muji is now selling T-shirts made from recycled yarn both online and in-stores.

Online communities in Shanghai now organize regular second-hand markets selling everything from post-cards to comic books. They are dominated by the Shanghaiese youth.





## Recycling Royals

**'One must cut costs'! Thrifty Queen to reuse old outfits to save money**

By DAILY MAIL REPORTER

Last updated at 2:25 AM on 22nd October 2008

## Sober monochromatic colours will dominate

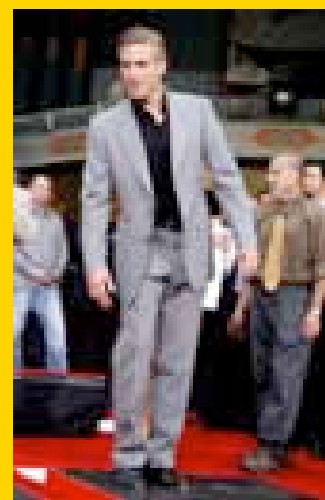
WGSN report that fashion will also turn back to basics in 2009. There will be an increase in garments reflecting colours that are earthy and “untreated” such as Okra, baked clay, terracotta. Perhaps reflecting the global mood, black and white will also make a comeback.



Faux motifs and surfaces will be popular this year, as will wooden accessories.



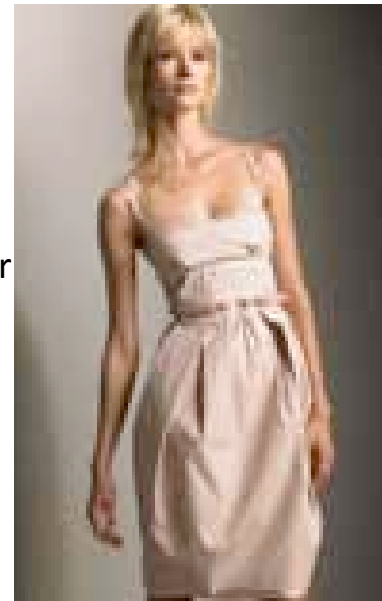
# From...



# ...To

Fluorescent pink  
to flesh tones

Shopping in best  
to shopping in leisure wear



Showy red  
to sober orange

Attention grabbing grey  
to understated smoke





## Natural textures

Portuguese craftsman Carlos Alberto released this recycled, second-hand masterpiece in January 2009. It is a fully functional vespa, clad entirely in wood.

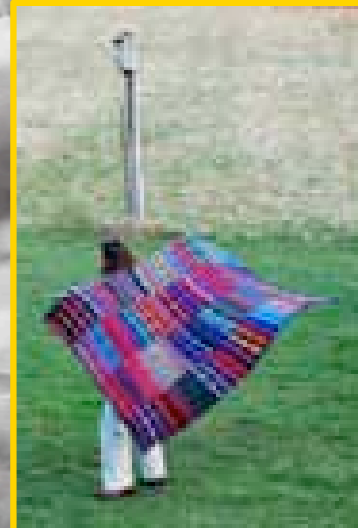
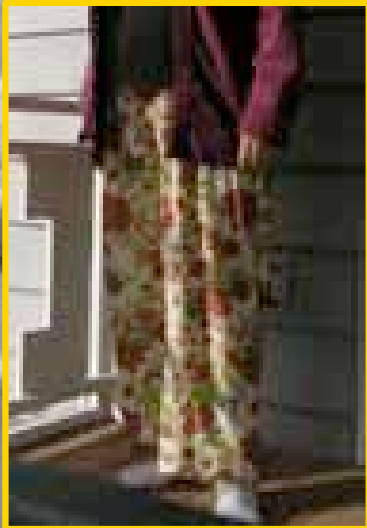




## Earthy fabrics

WGSN also note that fabrics that looking 'untouched', such as crumpled materials, well-worn and acid washed materials will rise in popularity this year.

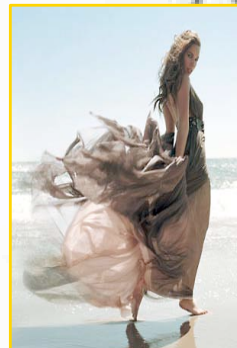
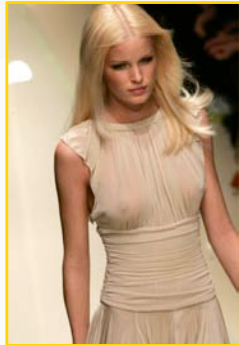
Farm-like patterns, bra tops and crochets will be worn alongside all in one suits and pyjama pants.





# Fashion Weightlessness

'Weightless' fashion will take hold in 2009. This marks a shift away from day-glo colours and heavy fabrics of last year, to be replaced by colours that feel light (such as the natural tones previously reported), vapor prints, levity patterns and nature-inspired motifs. Sheer is back in a big way, as are see-through fabrics, feathers and shadowy effects.



Bling-bling bachelor pads will make way for more flexible, rustic and country-inspired architecture, reflecting the desire of consumers to get back to basics in 2009.



# ChangeWords



\* Coined by Bates 141

## Credit Munch

Is the name given to the explosion in money-saving eating methods. Rejecting ready meals and shunning restaurants, consumers are going back to basics and cooking wholesome, simple meals from scratch.

## Voucherista

Is an emerging group of people who clip, download and share vouchers in order to save money on their shopping. Voucheristas are now setting up their own websites in order to share tips as well as vouchers with each other.



## Brand ChangePoint Opportunity

Now is not a time for posing. Times are tough and consumers are worried. Brands can appeal to consumers by removing anything associated with excess in their product line, including packaging. They should go back to the basics of their core offering, and if possible, offer raw and recycled materials.

Consumers are feeling comforted by images of freedom, nature and rusticity; not in-your-face craziness. Brands can generate online buzz by selectively seeding cost saving opportunities to voucheristas, who will amplify the message throughout the blogosphere.

This is a good time to win the hearts and minds of consumers. Brands that comfort their consumers in tough times will be celebrated by them in good times.

# 4

## From Dubai-esque To nondescript luxury





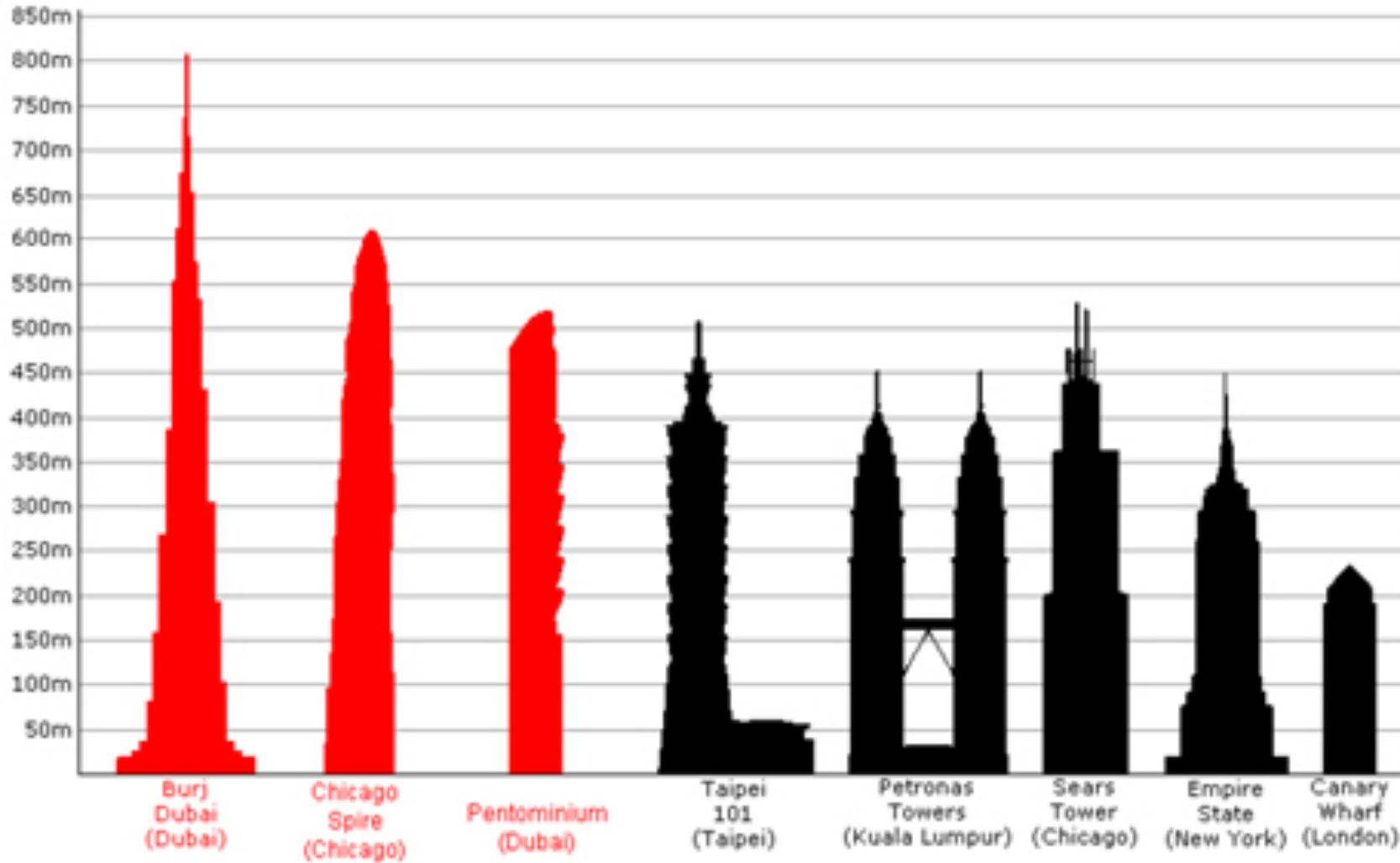
## The Change

*Home to seven star hotels, uber-luxurious shopping malls and some of the world's grandest property developments, Dubai-esque luxury was glittery, oversized and in-your-face; ultra-exclusive and expensive. In the Asias, where the luxury market has been growing faster than anywhere else in the world, understanding how the new sobriety is impacting luxury is essential.*

With the recent downturn, luxury is not going to disappear in the region, but it will take a new, scaled-down form. People still want to stand out for their good taste, but unlike luxury in the decade of greed, too much ostentation will seem out of place. Non-descript luxury will be about a private moment in time, personal to its owner, that need not be outrageously overpriced or trendy in order to provide a lasting memory.

# Until recently, the sky was the limit

In architecture, Dubai has been leading the race to the top.



# Bigger was better

Palm Jumeirah, man-made islands in Dubai.





# Architecture reached new heights

“The World” man-made islands in Dubai.







## Private homes became skyscrapers



In the heart of Mumbai, Indian billionaire Mukesh Ambani is building the world's first billion dollar home.

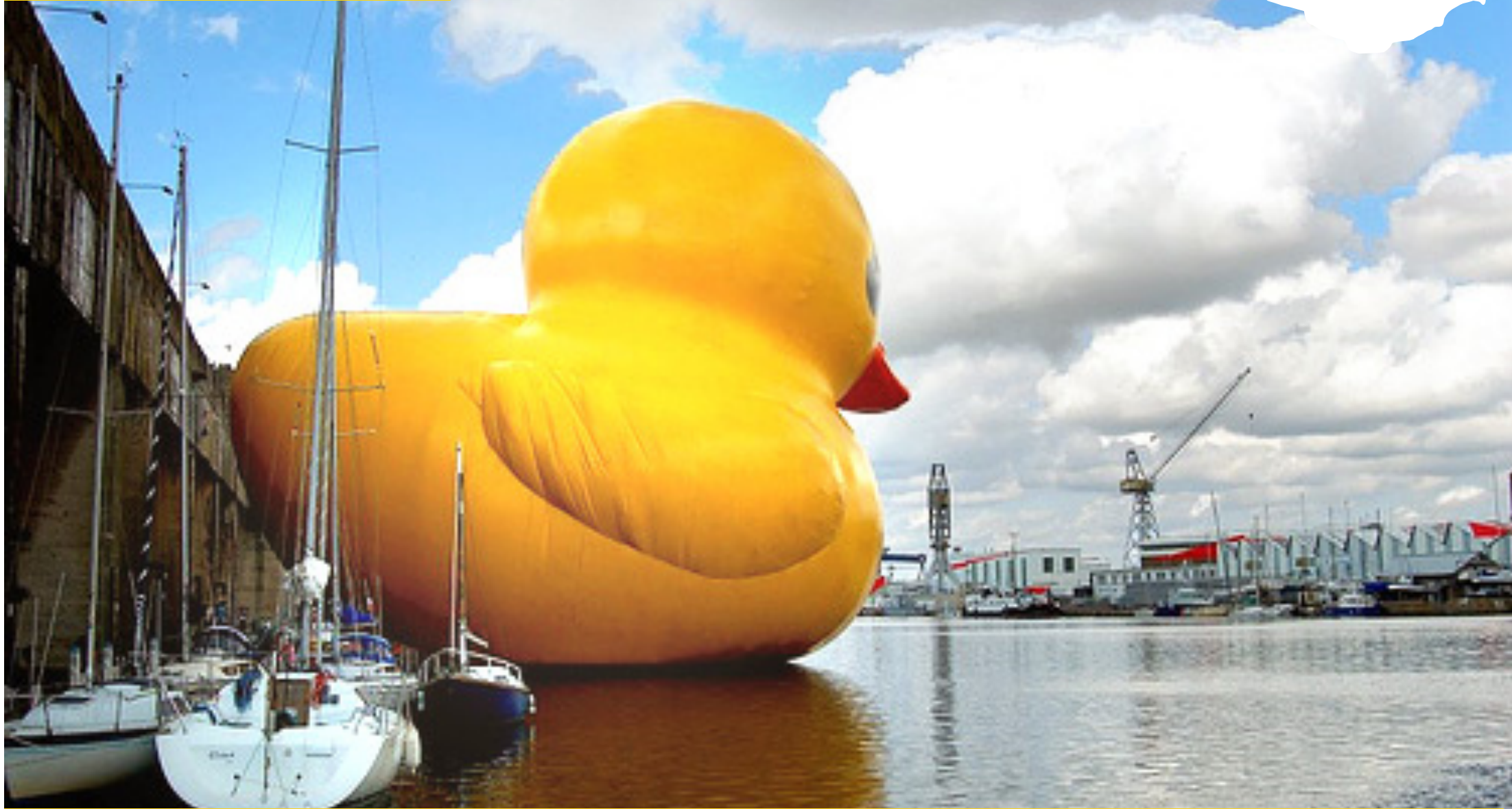
## In art, supersizing became a formula for success

1995: Jeff Koons's giant stainless steel "Balloon Dog" made the room look out of scale and invited the viewer to reassess their environment.



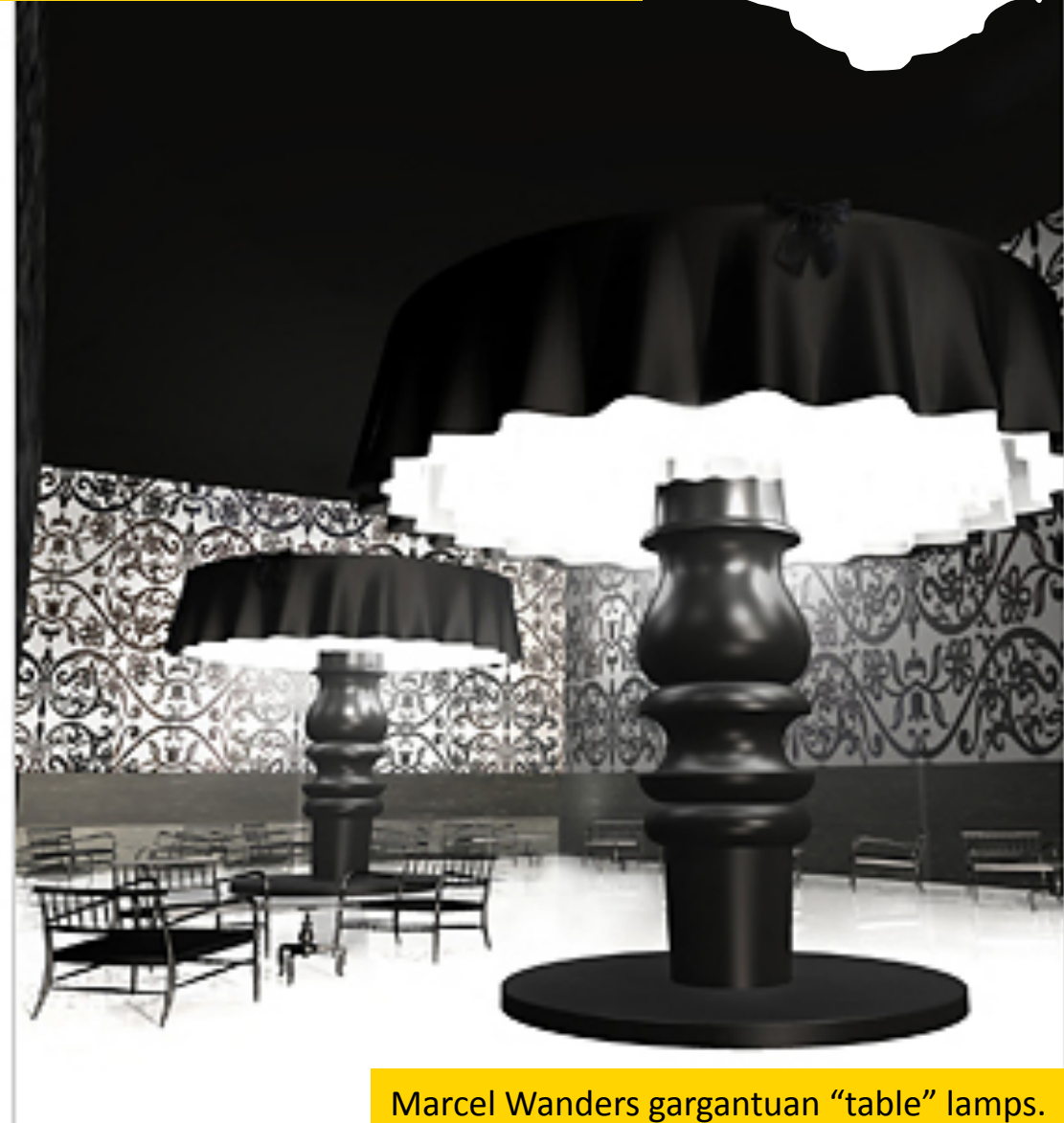


2007: Dutch artist Florentijn Hofman created the giant "Rubber duck".



## Hyperbolized design took over

*"A lot of the fans of this hyperbolized design style will be found around the wealthy Gulf. The new Villa Moda store for Kuwaiti luxury fashion retailer in Dubai by Jaime Hayon and the proposed store for the same company by Marcel Wanders located in Bahrain are two good examples."* The David Report, 2008



Marcel Wanders gargantuan "table" lamps.



## Over-commercialized art and design

*"In the recent boom, some in the luxury industry deluded themselves into believing that the more expensive an item, the greater its appeal to the wealthy, regardless of quality, functionality and service experience."*  
The Luxury Institute

**DESIGN:**  
Giant spoon by  
Studio Job, 2008

**ART:**  
Giant spoon sculpture, by Claes  
Oldenburg and Coosje van  
Bruggen, 1977





## Lux overdose

In the US, purchases of luxury goods were down a mind-boggling 34.5% for the first week of December.  
Source: Mastercard's SpendingPulse unit.

*"In the recent boom, some in the luxury industry deluded themselves into believing that the more expensive an item, the greater its appeal to the wealthy, regardless of quality, functionality and service experience."*  
The Luxury Institute

## Extravagant luxury is dead

*“The economic crisis is a moral and physical housecleaning. Until the world economy gets back on the right track, designers should stop with the extravagance. Crystals, sequins, rhinestones, and all that is glittery is done. Bling should be stopped.”*

Karl Lagerfeld







## Superfluous is out.

*"I was a producer of materiality and I am ashamed of this fact. Everything I designed was unnecessary."*

Philippe Starck, designer known for his mass consumption objects.



## But luxury is not dead

With an estimated 18,000 billionaires and 440,000 super-rich multimillionaires in China, the Chinese consumption of luxury goods will continue to grow at least 20% per annum. Last year, more than half of all Rolls Royce Phantom coupes were sold to China's super-wealthy class.

Source: China Luxury Summit November 2008





## Enter: Non-descript luxury

*"People are developing a distaste for extravagance that promises to affect spending on everything from cars and travel to electronics, fashion and household goods."*

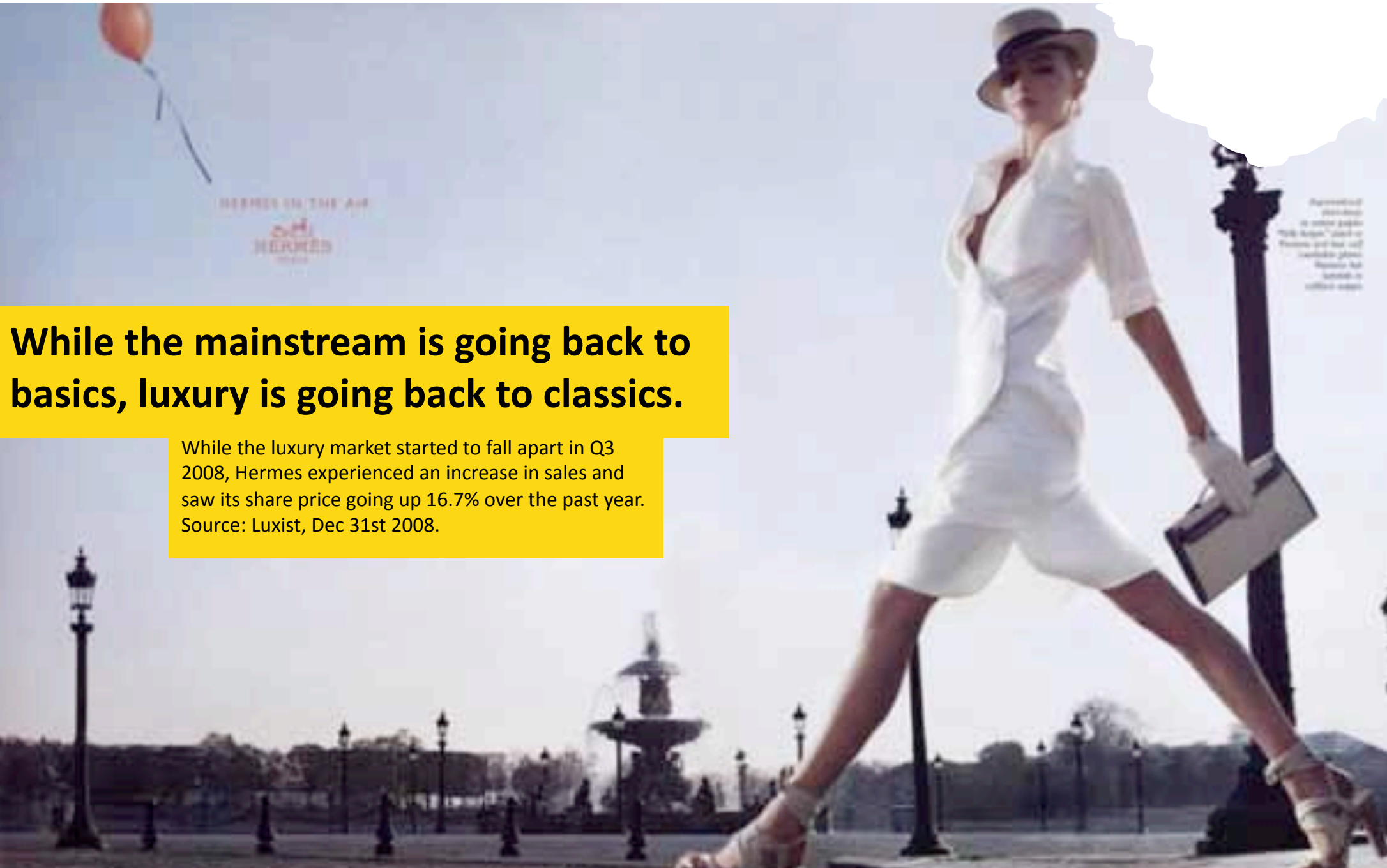
Wall Street Journal, Marketplace, 5<sup>th</sup> of November 2008

*Be anything but obvious*



TUDOR

WELCOME BIENVENUE BIENVENUTI WILLKOMMEN BIENVENUDO 歡迎 欢迎



**While the mainstream is going back to basics, luxury is going back to classics.**

While the luxury market started to fall apart in Q3 2008, Hermès experienced an increase in sales and saw its share price going up 16.7% over the past year. Source: Luxist, Dec 31st 2008.



## Luxury to be more bespoke

Global communities aggregating categories of bespoke luxury designers and producers are starting to flourish. Online membership models ensure members can be signed up from everywhere and shop from anywhere.



CURATED LIVING.

## Luxury to be more private

*"In the midst of this financial crisis, many wealthy consumers are feeling a tad defensive about luxury. They are selectively looking for a few playful indulgences that they can enjoy in privacy with family and friends".*

The Luxury Institute



Gilt Groupe is a private online community, which is dedicated to providing its members with access to coveted fashion and luxury lifestyle brands at sample sale prices. You must be invited by an existing member to join, and there is no cost to join Gilt Groupe. For additional information or questions about our membership policies, please send us an email at [membership@gilt.com](mailto:membership@gilt.com).

Thank you,  
Gilt Groupe Customer Support

Luxury brands  
Hand selected styles  
Members only prices

**GILT**  
GROUPE

## Luxury to tap more into folklore

“Coolturalism” is about giving brands a cool factor by tapping into local culture and regional folklore instead of globalized and identical design trends.

Source: David Report



Pattern by Klaus Haapanieri on an Iittala plate by Heikki Cirvola



Headlights open



## Luxury to be more subtle

*"The industry will move toward a period of subtle luxury. People are going to go with something more discreet that only the connoisseur would know and appreciate."*  
Julien Tornare, US president of luxury watchmaker Vacheron Constantin.



Some details of the BMW GINA can only be seen when in use or when needed.





## Luxury to be less serious

Eduoard Larmaraud diamond ring has a magnifying glass to stare at a tiny diamond.

## Status puns

*"It is a time when the logos and egos of luxury brands will start to look old-fashioned and people decide that luxury is no longer defined by the purchase of a designer product but is representative of something that is far more personal."*

Nicole Fall, FivebyFifty Asian Trends consultancy, January 2009.



Alissia's totes are simple and sturdy bags printed with the trompe l'oeil image of a status purse.



# ChangeWords



## Coolturalism

Is about giving brands a cool factor by tapping into local culture and regional folklore instead of globalized anonymous design trends.

## Hyperbolized design

Is the use of kitsch elements and imagery or surreal proportions to mix art and design together and sell designer products at a premium.

## Status puns\*

Is about making a product more fashionable by using it as a way to make fun of traditional status symbols.

\*Coined by Bates 141



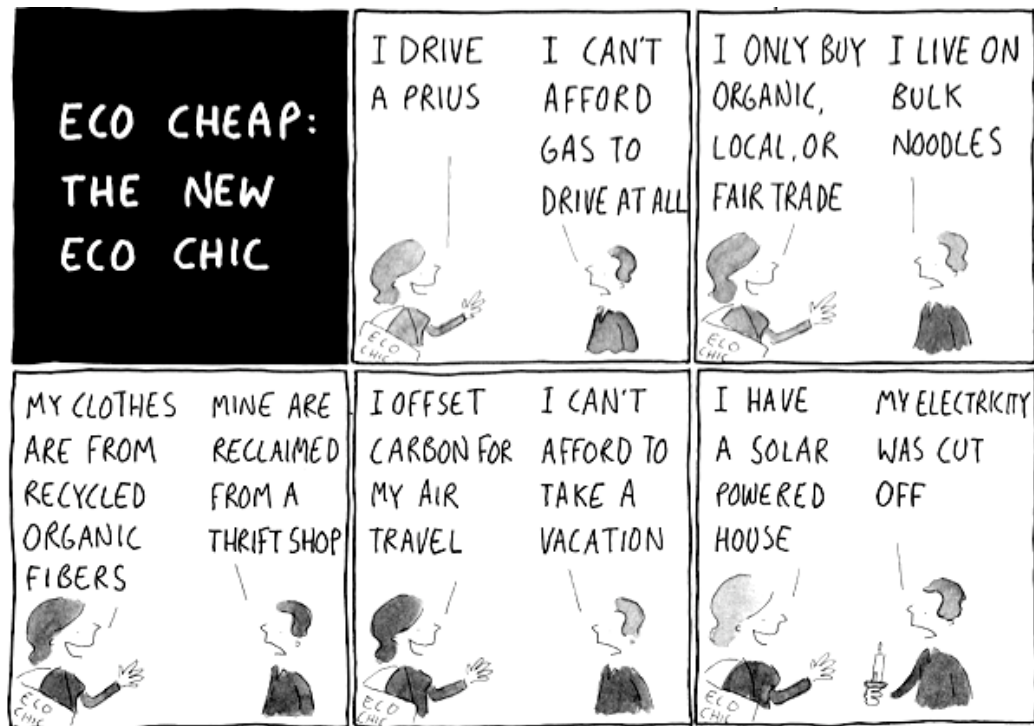
## Brand ChangePoint Opportunity

Luxury isn't about being the biggest and most expensive any more. The economic crisis is causing people to re-examine who they are, what they buy, as well as what constitutes true luxury.

Producers of luxury will have to offer more than fashion, scarcity or illusions of grandeur. Now, to justify a premium, luxury brands must rediscover genuine, timeless values such as quality, craftsmanship and service.

To reverse perceptions of greed, luxury brands should begin to give back to society; this could be through preservation of cultural folklore and tradition. How about opening up a heritage centre that showcases product inspirations by local craftsmen?

# 5 From eco-chic To eco-cheap







## The Change

*While eco-chic was all about looking good by doing good, eco-cheap is a new form of green consumerism more concerned with saving money.*

Being green means different things to different people and we are seeing the emergence of at least 3 segments of green consumers, from the most altruistic to the most pragmatic:

- The believers: who think ecology is a cause to champion
- The show-offs: who wear green as a way to keep in style
- The savers: who go green as a way to save money

In the context of the downturn, the green savers segment is likely to grow the most rapidly.



**IS YOUR  
TRIP NECESSARY?**

Historically, tougher times have always been a call for frugality.



**NEEDLESS TRAVEL  
*interferes with the War Effort***  
OFFICE OF DEFENSE TRANSPORTATION

**Do with less  
so they'll have  
enough!**



**RATIONING GIVES YOU YOUR FAIR SHARE**





The recessionary climate is likely to force even greater consumer change in relation to the environment as people seek ways to save money.

## Environmental crisis + financial crisis = eco-cheap

*"The current crisis is altering everyone's psyches even if they are not directly affected. There's been a real cultural shift: Self-sufficiency, once the mantra of hippies, is now fashionable."*

Dr Sheila Keegan, of Campbell Keegan Ltd trends consultancy

Photos by Martin E. Klimek, for USA TODAY

Green acres: My Farm gardener Max Goldstein checks out the corn patch in Anne Fisher Vollen's backyard in San Francisco.

# Farmland sprouts in the city





***“The economic downturn is accelerating mainstream acceptance of the thriftier behaviors of the green movement, like cutting out bottled water and growing vegetables.”***

Wendy Liebmann, Chief Executive at WSL Strategic Retail Consultancy, The Wall Street Journal, Marketplace, 5<sup>th</sup> of November, 2008

***“Businesses of all sizes are recognizing that going green can save money, open up new avenues of revenue, and help keep employees, shareholders and customers happy.”***  
WSJ, The Color of Money, October 6, 2008





**In Korea, direct to consumer farms enable people to source fresh food that is locally produced, greener and cheaper**

Agricultural Information Exchange Hansalim.or.kr directly connects consumers to local producers. The service is aimed at housewives who want to feed their children cheaper and fresher food.





the greentomatokit is here!

welcome to greentomato.org, the home of the greentomatokit, your green starter kit for the home. Each kit contains carefully selected energy, water and waste saving products that will instantly reduce your impact on the environment and

**save you money.**



the greentomatokit

The greentomatokit is an essential starting point for people who want to live greener lifestyles but don't know where to start.

£7.99 per kit  
inc. P&P

[buy now](#)

It contains carefully selected energy, water and waste saving products that help you make simple changes around your home that will reduce your impact on the environment.

## Going Green is now a means to being financially savvy

In 2009, "Going green" will be fueled primarily by cost-cutting as consumers shift from shopping therapy behaviors to consumption aversion.

*"greentomato's mission is to offer you ways of being kinder to the planet without sacrificing your standard of living and without it costing you more."*

**Saving money and materials are prompting a resurgence in DIY**



## Better for Your Budget

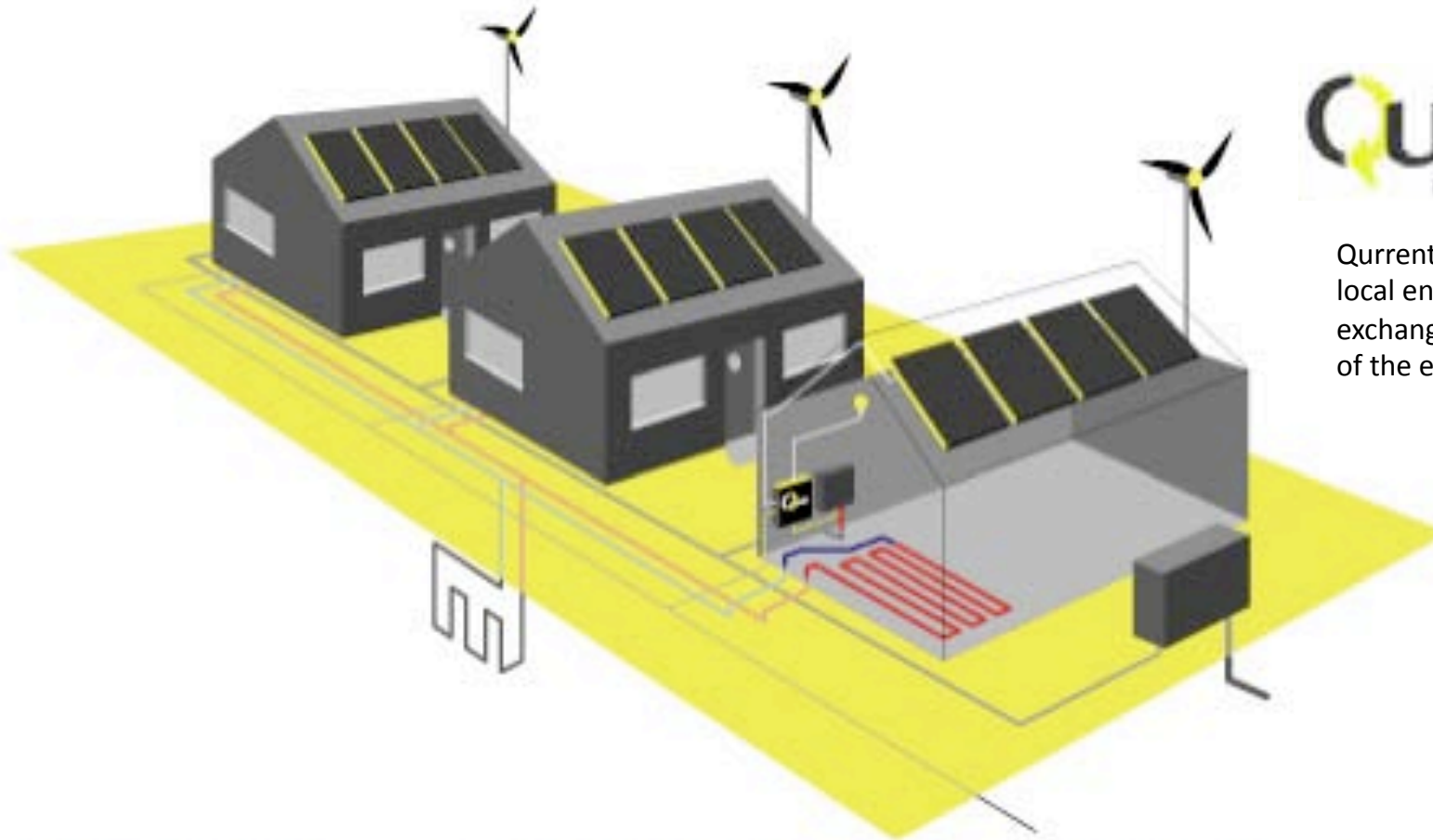
### Better for Your Home

Feeling a little strapped as of late? Use eco-friendly tips and products to actually reduce household costs.

**DIY Cleaning Kit - Save \$50/yr.**



## Local energy networks enable people to share energy



**Current**  
renewable energy

Current enables people to develop small local energy networks in which people exchange energy to maximize the efficiency of the energy they produce.



## **Wasteful incandescent light bulbs are going to be phased out worldwide**

Australia and Italy became the first countries to announce an outright ban by 2010 on incandescent bulbs. In the Asias, the Philippines are also attempting to introduce measures to phase out the use of incandescent light bulbs.

# Blackle

Search

Google™ Search

1,000,045,563 Watt hours saved

Blackle - Google - Google Maps  
Blackle - Google - Google Maps  
© 2008 Google

## From screen-saver to energy saver

Blackle is a blacked-out version of Google. It saves energy simply by having a black homepage instead of the normal Google white.



## Design is helping to visualize electricity consumption

Eco Watt displays the amount of electricity being used, the cost of electricity and amount of carbon emissions for any household appliance.



Wattson shows homeowners how much energy they are using in their home through both numbers and colours, ranging from cool blue for small amounts to red for high energy consumption.



Saving you up to:

# 15%\*

\* if used effectively



## Software companies and car-makers are teaming up to help people visualize gas consumption

Eco:Drive is an innovative, easy-to-use computer application developed by Fiat and Microsoft, that analyses consumers' driving style and helps them to use less fuel, reduce CO<sub>2</sub> emissions and save money.

Multinationals are using 'Green' as a way to save money too

# Honda drops F1 to go green

Japanese automaker responds to falling demand and growing sustainability concerns by ending Formula One sponsorship

By Kenny Lim

**TOKYO** Honda is expected to shift its focus to environmental campaigning after dropping its sponsorship of Formula One in a cost-cutting move.

According to reports, the Japanese firm will shut down its 750-strong Honda Racing team unless a buyer can be found to fund its participation in the motorsport.

Following a 32 per cent plunge in sales in the US in November, its most profitable market, Japan's second-largest automaker is expecting its worst operating profit, 350 billion yen (US\$5.9 billion), in eight years.

It is thought the decision to pull out of F1 will save the company US\$400 million a year. According to Richard Leung, regional channel planning director at Lewis, the automaker is also bracing for



*“Honda’s decision to pull out of F1 is expected to save the struggling carmaker US\$400 million a year.”*

ground on Toyota, which is trading the way for hybrid cars. Some 10 years back, it was leading the market with the Civic model, which was renowned for its engine. This latest move shows a tighter one of resources and good management in bringing the brand back in the right direction again.

In this environment, Formula One is a luxury Honda can no longer justify, according to Dan Parr, senior account director of sports marketing agency BrandHapport Asia Pacific.

with the launch of a regional campaign to promote the fuel efficiency of its i-VTEC engines. The ‘Drive every drop’ campaign came at a time when fuel prices were skyrocketing and Honda was keen to raise awareness of its fuel-efficient technology.

In 2007, Honda launched an F1-based green drive, ‘Earth car’, involving a car with no sponsorship logos. That initiative drew fierce criticism from environmental lobby groups, which claimed it was greenwashing.

See *Business 9* page 99



## Traditional packaging is being revisited to save space and raw material

Newton shoes packaging is recycled from egg boxes. Like an egg carton, the molding adds strength so you can stack them high for cost-effective distribution.



## Iconic products get repositioned as 'eco-cheap'

With the Mini E (for Electric), BMW is repositioning the premium little Mini as an energy efficient car.





## Key players are investing to make green products more affordable



**IKEA GreenTech Fund**  
IKEA is investing US\$77 million dollars into clean technology start-ups to develop solar panels, lighting and efficiency meters. Due to IKEA's size, these green efforts could reshape the entire furniture industry.



## Broken furniture gets a new life

Dutch designer Jetske de Groot project “Multiple Family” is driven by a simple approach: take two or more broken chairs or tables and fuse the non-broken bits to produce a new, functional and completely unique design.



## China is set to lead the production and consumption of eco-cheap products

According to Synovate, ¾ of all Chinese respondents claimed they bought a green product in the past year; 60% bought energy efficient devices; 70% reduced use of plastic bags and 82% cut power consumption.

Source: "The Impact of Chinese Consumer Perception of Climate Change on Business" by Media Planning Group, July 2008.



Vegetables and solar panels in urban Hangzhou, China



# Because China is very polluted, Chinese people are more “eco-absorbed”

46% of Chinese are “eco-absorbed”, or very focused on the issue of climate change and 93% believe they can contribute to solving the problem.

Source: "The Impact of Chinese Consumer Perception of Climate Change on Business," by Media Planning Group, July 2008.



31% of Chinese consumers identify the environment as a higher priority than the economy, a higher percentage than the U.S. and the U.K.

Source: Landor Associates September, 2008 study.





## From “Red March” to “Green March”

China's rapid industrialization has resulted in major environmental problems. Almost all the nation's rivers and 90% of underground water in cities is polluted. 16 of the world's 20 most-polluted cities are in China and air pollution is a serious issue for 2/3 of China's 338 largest cities. Meanwhile, half of the 1.3 billion Chinese population lacks access to clean drinking water.  
Source: World Bank

Leveraging Beijing's status as the Olympic host city, a youth movement started in China. Over the summer, 32 universities and 5,000 students participated in the Green Long March, playing on the idea of Mao Zedong's "red" long march to galvanize environmental change across China.

# ChangeWords



## Eco-cheap

Is a new form of environmentally friendly product or service that save consumers money by principally enabling them to reduce waste.

## Ikearchitecture\*

Is a kind architecture that is sustainable, cheap and modular in nature so that it can be pre-fabricated and easily de-assembled, re-used or recycled.

## Eco-absorption

Is when a consumer is so concerned about environmental issues that he becomes willing to contribute materially by changing his way of life for a more eco-friendly lifestyle.

\* Coined by Bates 141



## Brand **ChangePoint** Opportunity

The current economic turmoil is making it impossible for brands to command a premium for being green. But the upside, is that more consumers might end up going green for saving money.

From selling sustainability as a cause to 'believers' or as fashionable to 'show-offs', marketers now need to consider equating 'green' with 'value for money' to attract 'savers', the new segment of green consumers which is likely to grow the most rapidly. Do you know which green segment your brand is going after?





# From concrete jungles To urban gardens

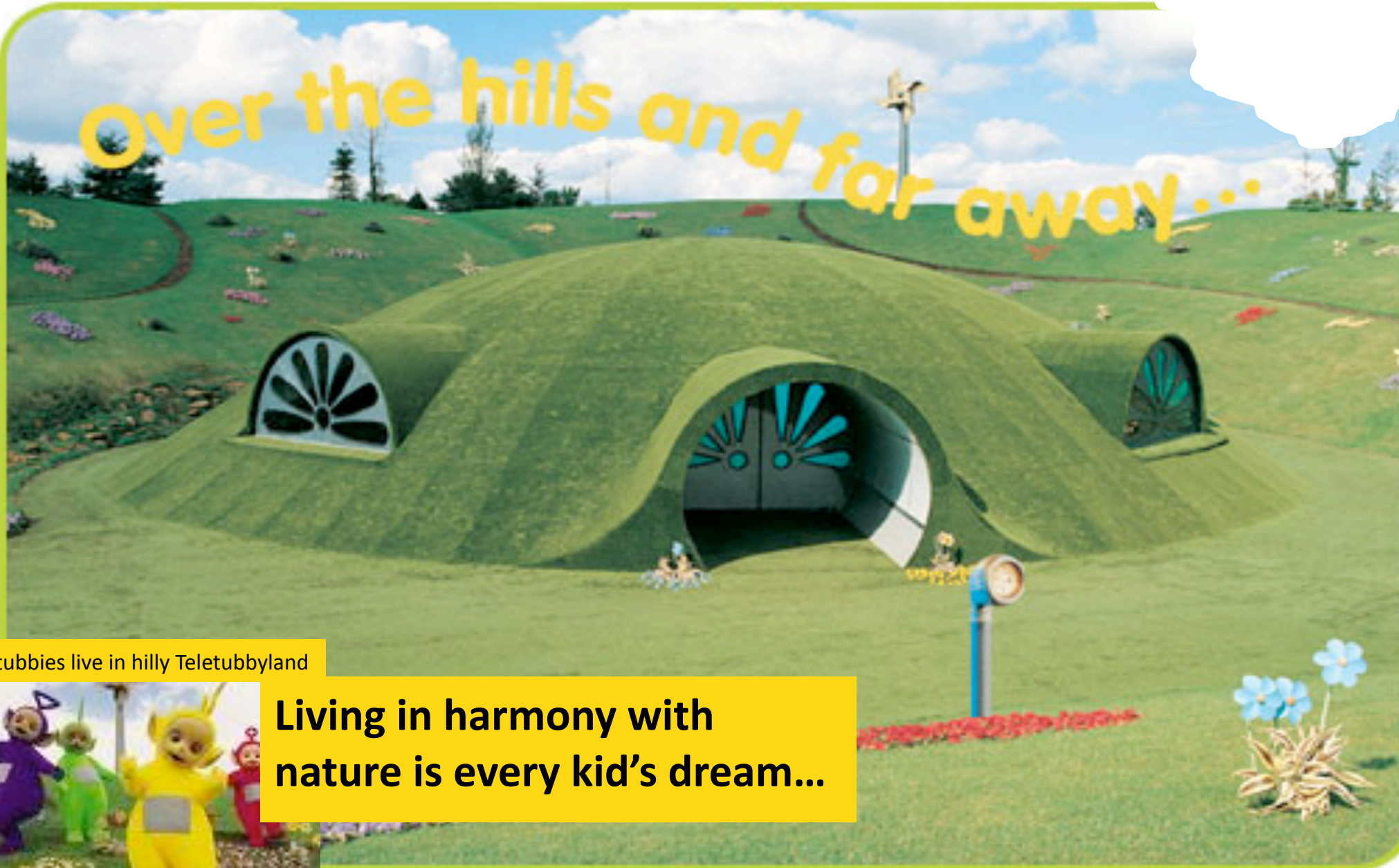


## The Change

*With more than half of the human population (3.3 billion people) living in cities for the first time, 2008 marked the advent of the urban age.*

To make up for the lack of nature in crowded urban environments, inhabitants and architects alike are now increasingly reappropriating the cities by filling them with greenery. Areas that used to be concrete wastelands are being transformed into unexpected urban gardens.

Over the hills and far away...

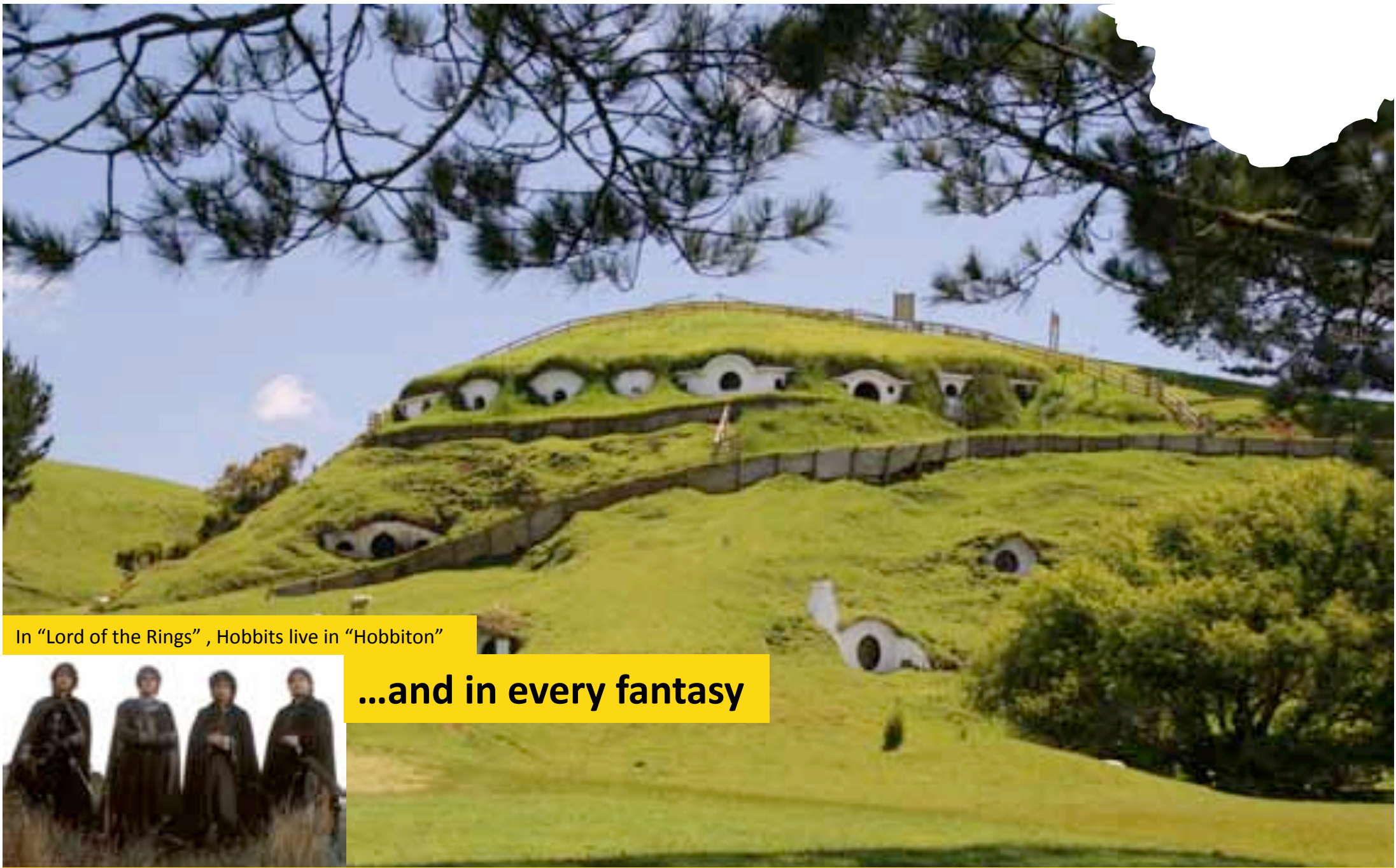


Teletubbies live in hilly Teletubbyland



**Living in harmony with nature is every kid's dream...**





In "Lord of the Rings" , Hobbits live in "Hobbiton"



**...and in every fantasy**





**The role of the architect is changing from designing housing to building green spaces**

California Academy of Science by Renzo Piano



A photograph of the interior of a large rainforest dome. The space is filled with lush, green tropical plants, including ferns and large-leafed trees. A winding path or walkway is visible in the background, and the overall atmosphere is bright and verdant.

## Urbanism is evolving from building gardens in the city to building cities in a garden

Rainforest dome in the California Academy of Science.



## Vertical farming

In the near future, sky farms or vertical farms producing food and water for city inhabitants will be as common as the theatres and libraries which produce the culture that feeds the mind.

Irrigation will come from filtered sewage, nourishing a wide variety of plants growing on hydroponic technology.





## Underground farms

Pasona is an underground urban training facility for wannabe farmers in Tokyo where a square kilometer of subterranean soil has been planted with rice, vegetables, fruits, flowers and herbs.





## Urban gardens

Urban farming is a global phenomenon that sees people save money and reduce carbon emissions whilst increasing their intake of healthy food by growing their own vegetables.



This picture was taken by a Bates 141 Change Agent in Singapore. Six months ago, this garden was just a unkept patch of grass, now the owners have started to grow their own vegetables.



## Edible landscaping

Edible landscaping is the planting within communities of anything that can be eaten. This can include vineyards and orchards of edible plants, from spices to fruits, nuts to potatoes.





# Agro-housing

The Agro-Housing concept by Israeli Knafo Klimor Architects is a combination of housing and urban agriculture. The building is composed of two parts; an apartment tower and a vertical greenhouse for cultivating crops.



# Agritecture

To save the NY Train high line from decay, architect firm DSR converted it into a promenade. This 'agritecture' project is the biggest project in the city since the turn of the 20th century.





# Bioclimatism

Bioclimatism is about using natural ventilation as air-conditioning and optimizing the building's use of natural light to create a controlled microclimate.



The portable “air trees” by the Architects Urban Ecosystems are covered with plants that breathe and release humidity in the air to bring together local citizens and keep them cool.



The Solstice on the Park, a Chicago residential tower to be completed in 2010, is literally shaped by solar access. Its surface is designed to precisely the optimum angle for 41.5 degrees north, which allows the sun to enter the apartments during winter for passive solar warming and keeps it out during the summer to reduce air-conditioning usage.

South Beach is a commercial and residential complex by Foster + Partners, to be located next to Bates 141 in Singapore. Two towers with slanting facades will catch wind and direct air flow to ground-level spaces while a large 'environmental filter' canopy that covers open spaces, will provide shelter from the elements and draw air currents to cool the area beneath it.





## Guerilla gardening

Guerilla gardeners fight the tyranny of the concrete in the urban jungle with plants and flowers aimed at bringing back greenery in grim parts of the city.





## Green Walls

Green walls are the vertical version of a green roof. They provide a unique façade on exterior or interior walls while increasing air quality, absorbing sounds, and adding a striking aesthetic element.

## Green Rooftops

Recent research has shown that the average city street produces too many stimuli for the human brain to cope with, while even small doses of nature improve mental functioning.

Source: University of Michigan study, 2008





# Green Rooftops

Disconnected from the real world and living in an increasingly virtual environment, people will seek reconnection with nature. Green rooftops will provide urban dwellers with the necessary green space to breathe, daydream and socialize.

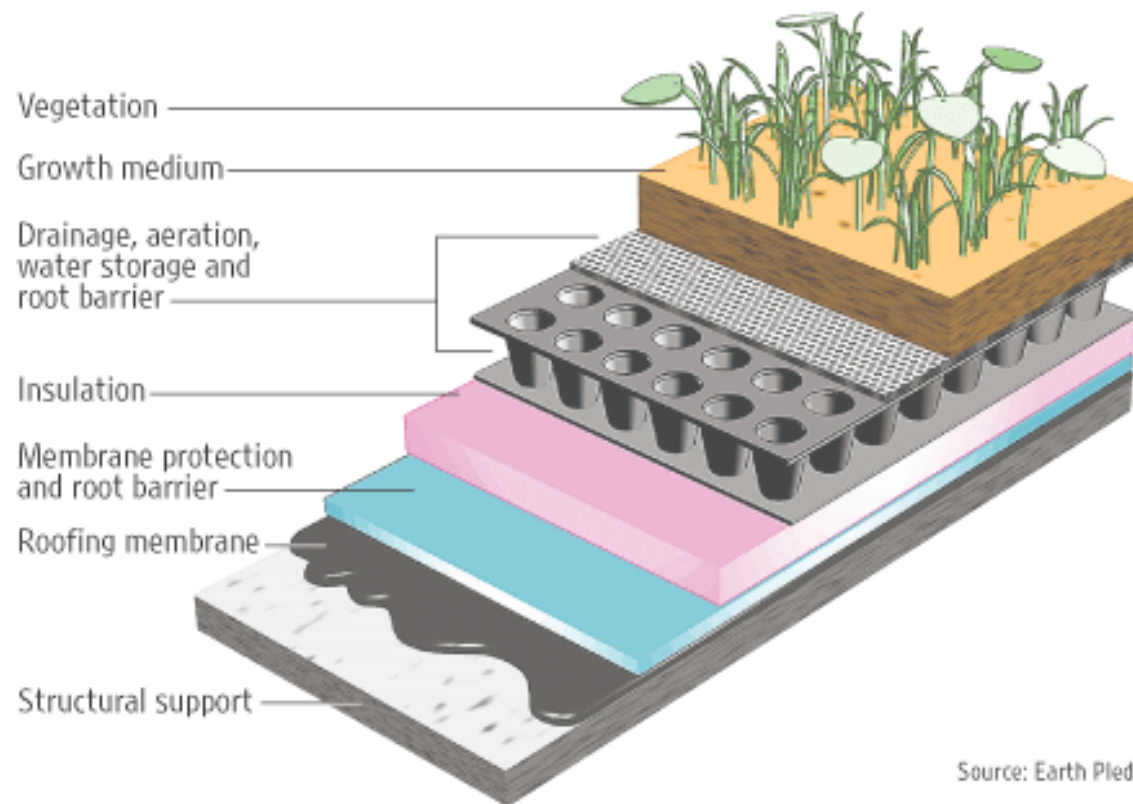


Parking Block Roof Garden, Queenstown, Singapore



# Green Rooftops

Adding a layer of vegetation on the top of buildings insulate them better and therefore reduce the reliance on heating systems or air conditioning. This may ease global warming by reducing the urban-heat-island effect created when dark-colored, impermeable surfaces absorb heat energy and radiate it back into the air.



Source: Earth Pledge

# ChangeWords



## Agro-housing

Is a housing project with a greater purpose: to provide the space and conditions to grow food for consumption by the local community.

## Edible landscaping

Is the use of food-producing plants in the residential landscape. The idea is to produce fruits and vegetables for home use in a layout that is aesthetically pleasing.

## Guerilla gardening

Is a form of nonviolent direct action by green activists who take over an abandoned piece of land which they do not own to grow crops or plants. The idea is to to reclaim land from perceived neglect or misuse and assign a new purpose to it that benefits the community.



## Brand **ChangePoint** Opportunity

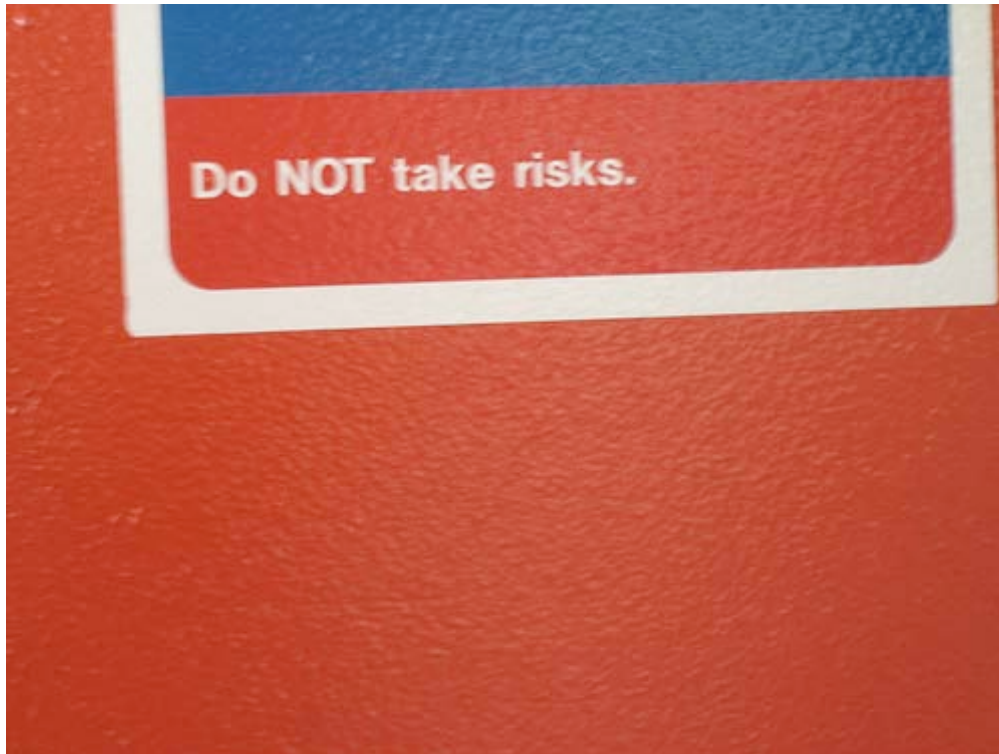
Cities are more crowded than ever, and their claustrophobic inhabitants are taking a stand. They seek nature to escape from concrete wastelands.

Now more than ever, people are looking for cheap, green and cheerful ways to enjoy themselves. Brands need to leave the comfort of their air-conditioned environments and set about using green spaces so that people can get a breather from the city. From cinema under the stars, to rooftop garden parties and picnics in the park, brands should make use of urban gardens as new touchpoint opportunities to connect with the crowd.





# From high-rollers To playing it safe



## The Change

*Gold credit cards, luxury holidays, shopping sprees and risk-taking were just part and parcel of life for even the middle-classes. Life was good for the past few years, easy even, and the bank balance was never really an issue with plastic to the rescue.*

In 2009, consumers will be much more risk-averse. Even those who can afford to keep spending throughout the downturn will re-evaluate their behaviour and cut out many un-necessaries. The Asias will return to their old savings habits and what is owned will be protected, as the period of financial frivolity gives way to financial conservatism.

## Consumers were living the dream

Throughout the decade of greed, consumers brushed risk aside and enjoyed lifestyles that were way above their physical means.

*"The rich were not the only ones consuming conspicuously in recent years. The middle class, bingeing on cheap credit, also treated itself. Those consumers were beneficiaries of false wealth, and they were living, literally, like millionaires."*  
Marshal Cohen, chief industry analyst for NPD Group



Masses queue to get inside Gucci, 2008



## Cheap credit fuelled the dream

Bank of China data shows that between 2007 and 2008, the number of credit cards in China rose by 93% to 105 million, and with 105 billion yuan spent on them.

This huge uptake was encouraged by the government, as Asia Times reported: *'Beijing, keen to encourage domestic spending and reduce the country's dependence on exports to generate growth, wants 30% of retail sales to be made through credit and debit cards in big cities by next year, from 10% at the end of 2005'*

Source: China Stocks Up on Credit Cards, 2008

It is not unusual for urbanites in the Asias to own two, three, or even four credit cards to sustain their 'millionaire' lifestyles.

## But high-rollers are getting worried

Consumer confidence declined across the APAC region in Q4 2008, which now ranks third in the world. South Korea is the least confident country in the region, and many other countries have seen sharp falls.

Confidence in Thailand dropped by 3 points to end the year at 67.5 (against a regional average of 85.1), China's level is the lowest since the SARS outbreak in 2003, and Singapore has fallen an enormous 22 points to eighth place in the region.

*Source: Nielsen*

Scenes such as this in Singapore may become a thing of the past because the city-state has recorded its lowest consumer confidence in history.



## Plastic aversion

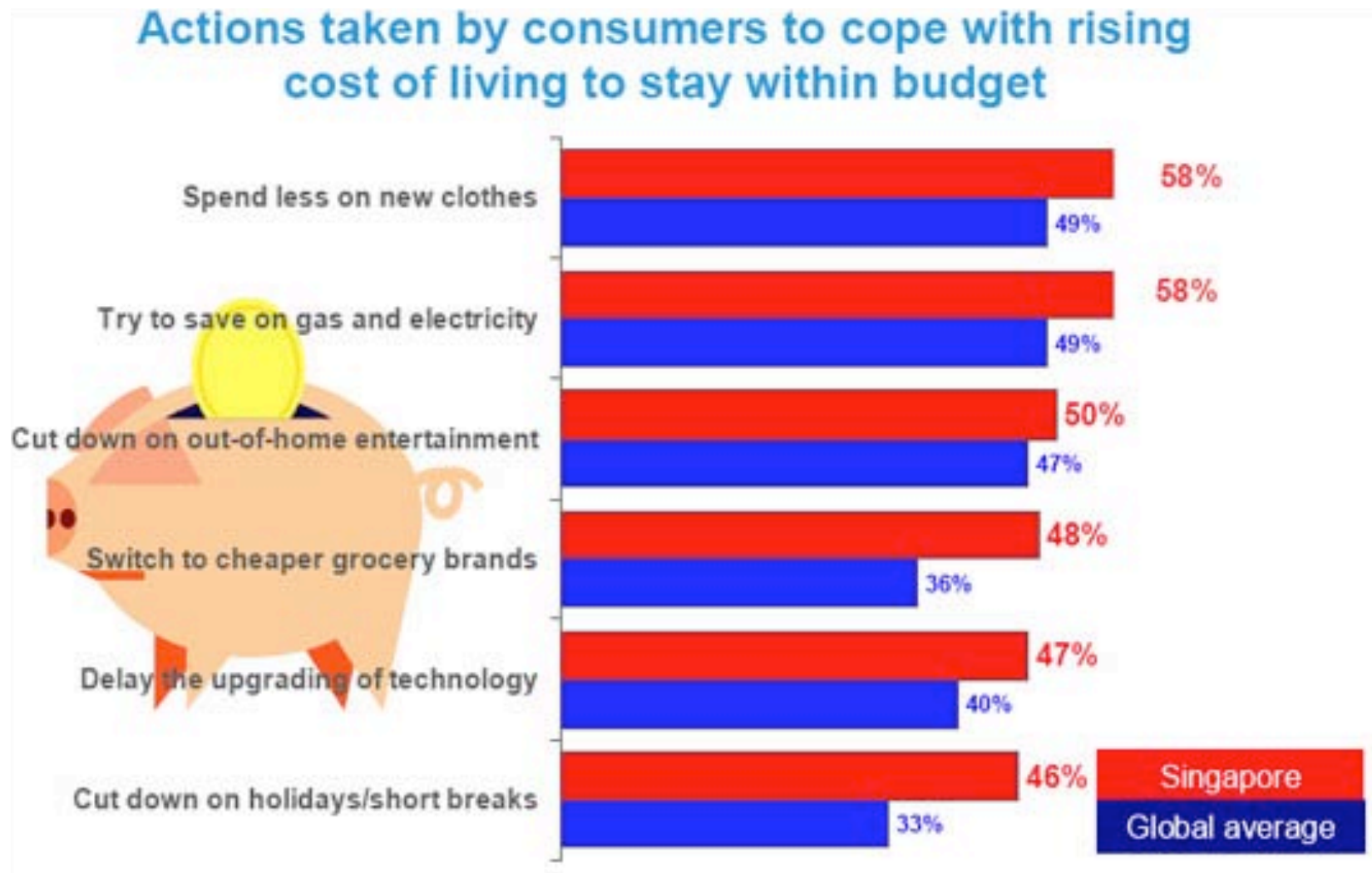
The global financial crisis is causing Asian consumers to re-evaluate their priorities. Unlike in the West, it is still relatively uncommon for homes to be repossessed and most local corporations are still intact, however there is a fear across the Asias that the worst is yet to come. Consumers are no longer attracted by the fake 'millionaire life', instead they are choosing to spend only the money they earn, and spend it more wisely.





# Playing it safe

A Nielsen study undertaken in Q4 2008 shows that Singaporeans plan to slash frivolous expenditure. In every measure, they intend to cut down spending more than the global average.

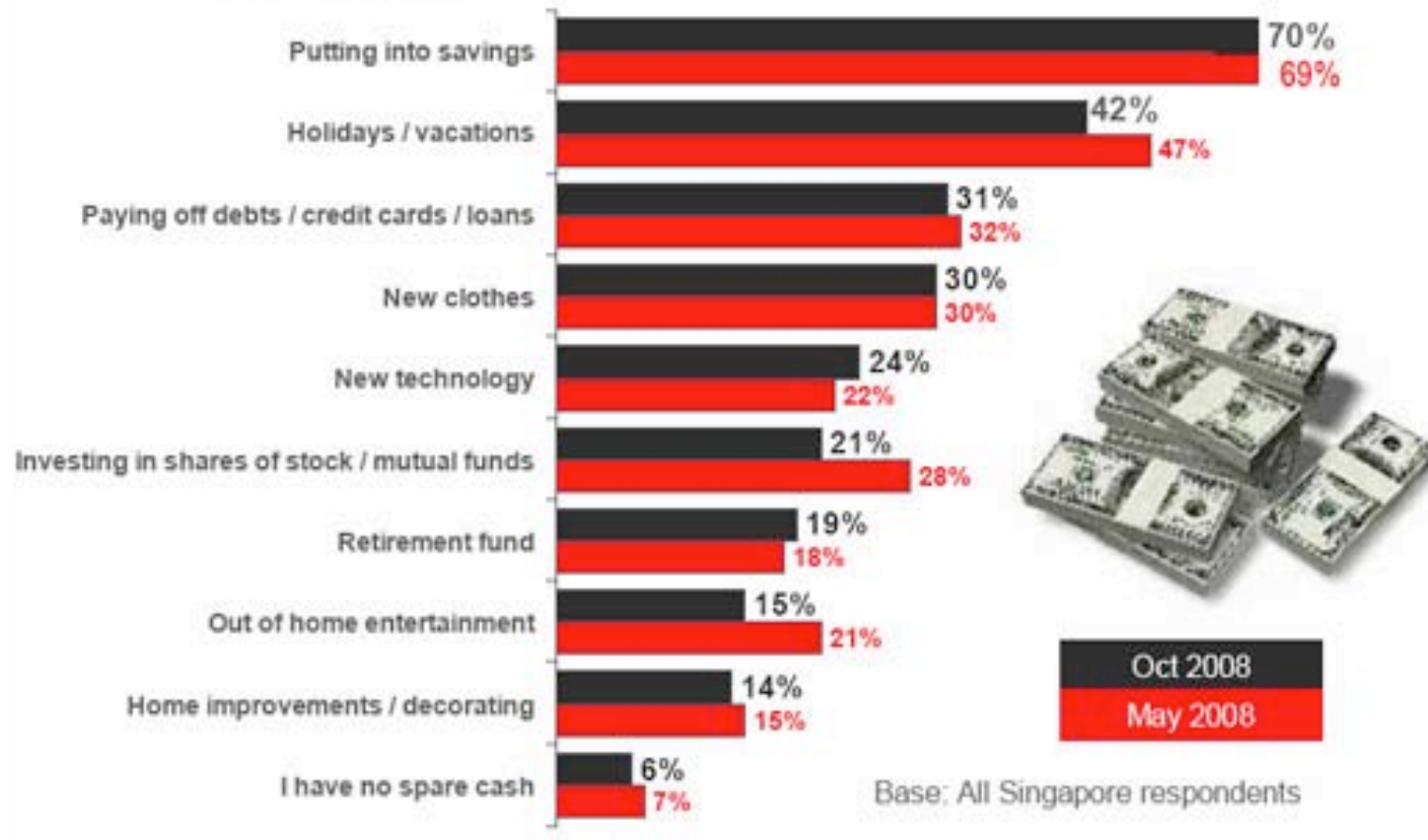


Source: Nielsen Global Consumer Confidence Survey, 2008

# Playing it safe

Spending on extravagances, such as out-of home entertainment and holidays, will be cut back and risky investments in stocks are seeing a decline. At the same time, Singaporeans will play it safe and plan ahead by putting money into savings and, increasingly, retirement funds.

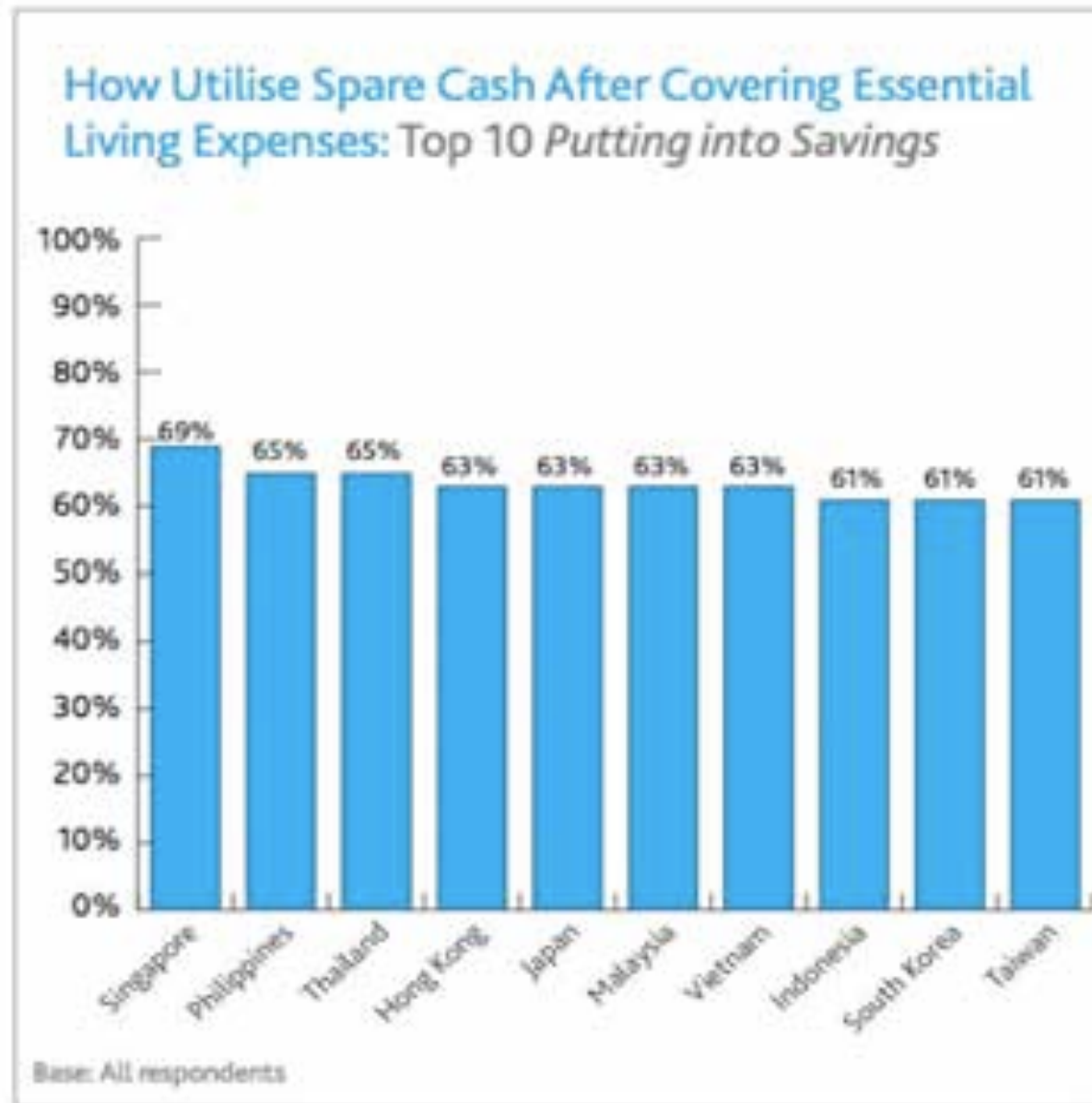
## How Singaporeans intend to spend their spare cash Oct 08 vs May 08



Source: Nielsen Global Consumer Confidence Survey, 2008

## Saving is making a comeback

Historically, Asians have been big savers. Having lived the 'millionaire' life for a while, the Asias will see frivolity scaled back and a return to saving will ensue. Every single country in the 'Top 10 putting into savings' is drawn from the Asias, with an average of 64% saying this is how they will use their disposable income. This compares to 46% globally.



Source: Nielsen Global Consumer Confidence Survey, 2008



## Consumers avoiding risk

In Japan, risky investment trust balances have fallen by 40% since Q1 2008. Whilst they tumbled, deposit balances at banks were still rising by 6% in December '08. In addition, there is now JPY179 trillion of deposits in Japan Post, who is seeing a renewed rise in deposits after losing around JPY10 trillion per year in savings for the past five years to sexier investment opportunities with much higher risks associated.

## Insurance boom

Instead of borrowing more, consumers are starting to protect what they have. A total of 978.4 billion yuan (US\$143 billion) in insurance premiums were collected last year, a jump of 39.1 percent from a year ago, the China Insurance Regulatory Commission said on its Website.

In spite of issuing a profits warning, China Life's premium revenue reached RMB 295.6 billion (US\$43 billion) last year, representing a increase of 50% from 2007, China Knowledge reported.



## Risk aversion

Flybe, a UK-based airline, is eliminating the risk involved with booking a flight and providing consumers with a reason to purchase. Every flight booked in January 2009 comes with free redundancy insurance. This means that anyone who books a flight and then loses their job will get their money back.

**FREE REDUNDANCY CANCELLATION  
COVER FOR BOOKINGS MADE  
THIS JANUARY...**





## Planning ahead

Not only are sensible shoppers cutting out excess and eliminating risk, they are re-evaluating the necessity of every purchase they make; even ones that are affordable. By only purchasing only what is absolutely necessary, consumer spending is shifting from 'wants' to 'needs'.



No longer do people buy without thinking of the consequences.

*"Corrosion shmorrosion—I said I want it chromed!"*

# Rental culture strengthens

Why buy something that gets used once or twice? In 2009, more people will be renting instead of owning.



iLetYou, is a website that hooks US consumers up with rental retailers. So far, 61,000 business have signed up for the site



Rent-a-toy Singapore allows parents to provide their children with up-to-date toys, and return them when they are deemed boring by their child.



No Londoner is ever more than 5 minutes walk from a Streetcar. By booking the car online, drivers gain access to vehicle with their card, and start the ignition with a pre-emailed PIN number.



ThatBagIWant.com delivers ultra high-end handbags and sunglasses to women who still crave the millionaire look, but have shunned the millionaire life.

## A return to mattress culture

In the Asias, there has been a marked increase in those who distrust economic institutions. Emotional security is now ruling the region, and so people are choosing to play safe by saving their money and keeping it where they can see it: under the mattress.



According to the Economic Daily, more than five trillion RMB is in private hands in China, of which only about 3 trillion is held by banks.



## Safe is good

The desire to keep money where it's known to be safe is leading to sharp rises in the sale of safes.

*"It's simple...if there is a lack of confidence in banks, people buy safes and put the contents on their home insurance... We've seen a 25 per cent increase in sales and inquiries over the last four weeks, in particular for higher-grade safes that insurance companies approve for larger sums."*

Russ Reader, MD of Leigh Safes in January 2009.







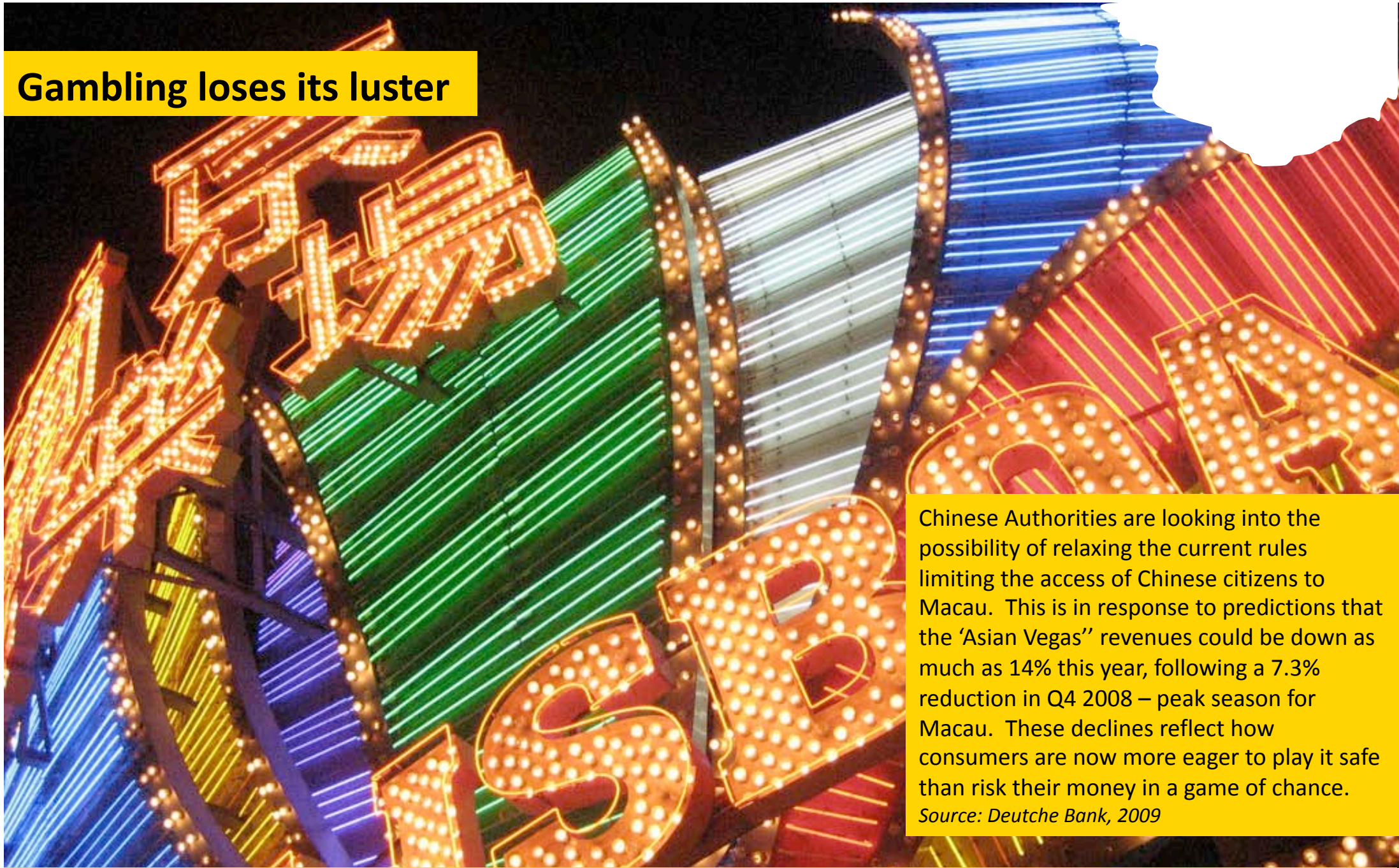
## Even the super-rich are going low-risk

High-net worth Indians are withdrawing their money from stocks, even low risk-return investments, and turning to less turbulent commodity-based opportunities such as gold. Whilst the percentage of investors putting their money in stocks fell from 74% to 58% between Q3 and Q4 2008, investments in gold skyrocketed, from 42% in Q3 to 97% in Q4.

*Source: Commodity Online, 2009*



## Gambling loses its luster



Chinese Authorities are looking into the possibility of relaxing the current rules limiting the access of Chinese citizens to Macau. This is in response to predictions that the 'Asian Vegas' revenues could be down as much as 14% this year, following a 7.3% reduction in Q4 2008 – peak season for Macau. These declines reflect how consumers are now more eager to play it safe than risk their money in a game of chance.

*Source: Deutsche Bank, 2009*



## Pleasure peripheries are decreased

The combination of high oil prices, economic uncertainty, and a desire to play it safe, is causing consumers to re-evaluate their pleasure periphery; that is, the distance needed to travel in order to feel as though one is on holiday. As a result of the number of 'urban gardens' cropping up, in many cases the pleasure periphery has reached zero, with people opting to holiday at home, or 'staycation'.

Conservative spenders are compounding an already dire situation for the world's airlines. In 2009, many airlines will ground planes and cut capacity to remain profitable.

# ChangeWords



## Mattress culture

Is derived from the Asian tradition of keeping money under mattresses instead of in bank accounts. Now, as trust in financial institutions ebbs away, consumers in the Asias are again keeping their money at home.

## Pleasure periphery

Is the distance that an individual needs to travel in order to 'get away from it all', or to feel as though they are on holiday. As a result of playing it safe in '09, many consumers' pleasure peripheries are reducing to zero. Instead of travelling overseas, they 'staycation'.

## Staycation

Is a choice by a consumer to take a holiday in their home town. Now that green space is being actively developed in many cities, expect staycations to rise in 2009.





## Brand **ChangePoint** Opportunity

In today's risk-averse environment, brands need to entice consumers to live a safer lifestyle, rather than tease them with 'millionaire life' products and services.

Marketers should think of new forms of insurances they can tie to their products – look at return guarantees, sponsoring savings schemes and using better money management as part of their CSR efforts.

The time has come for brands to help consumers save, rather than spend.





# From attitude To gratitude



"Kissing the ceiling" Photo series by Fred Muram.  
(Be happy to have a roof above your head ;-)

## The Change

*While attitude was all about finding status through consumption, gratitude is about finding happiness outside consumerism or at least feeling grateful for what one sells, buys, makes, tries, trades or shares.*

Challenging times will see people craving more positive ideas that spread a cheer. From CSR to upbeat advertising, green efforts to goodvertising, consumers are going to seek more empathy, generosity, positivity and reciprocity from people and brands. From repentant billionaires to the man on the street, activism is going to become mainstream.

## Billionaire Activism

Richard Branson was named Citizen of the Year by the United Nations for his eco-advocacy and commitment to funding green energy solutions.







## The global search for redemption is on

Post-crisis, doing good will become a way to salvage reputation among discredited wealthy people. However, Bill Gates and Warren Buffet's entry into big-league philanthropy has now created a new level of scrutiny for ineffective philanthropies to deliver results.

Internet is making online activism mainstream globally

Share with the people in your life.

The screenshot shows the Facebook Causes application interface. At the top, it says "Causes" with "Edit | See All" options. Below that, it features a "Featured Cause" for "Feed Hungry Children in Haiti" with 10,235 members and \$14,810 donated. It also lists "12 recruited", "\$60 donated", and "\$145 raised". There is a "View" button and a "Donate" button. At the bottom of the featured cause section, there is a large group of colorful cartoon children.

"Causes" is one of the most popular Facebook application.

**CAUSECAST** is a place to explore issues while helping you connect with a community of people wanting to make a difference. [Join Now](#) or [Log In](#)

The banner features a world map composed of small white dots on a dark blue background. Below the map, the text reads "THE CAUSECAST" in large white and pink letters, followed by "YOUR CHANNEL FOR CHANGE™" in smaller white letters, and "CLICK HERE TO START WATCHING" in blue letters at the bottom.

Causecast is the equivalent of YouTube for people who want to broadcast or share cause-related videos.



# China's Me Generation is turning into the We Generation

China's "Little Emperors" are a result of the country's "One Child Policy" instigated in the late 1970's. Also known as the "Me Generation", these young people have enjoyed lavish parental attention and dedicated family resources. As a result they have become demanding consumers.



Source: WGSN

## China's Me Generation. The new middle class is young, rich and happy. Just don't mention politics

BY SIMON ELEGANT, BEIJING





# Now, "Little Emperors" are becoming "Big Givers"

## the earthquake

*"Wanting to help the earthquake victims has made me work harder than before. I'm ready to help them rebuild their homes, that's why I am choosing architecture as my major."*  
- Biwei, 18, M, Shanghai



*"I have always relied on my parents but, after the earthquake, I realized that I may have to face and conquer some difficulties on my own."*  
- Yi, 20, F, Chengdu



*"I study in Chengdu and I didn't used to go home, even for the holidays. Now, I chat with my parents using a webcam every week. I feel relieved when I see with my own eyes that they are happy and healthy."*  
- Lei, 24, M, Beijing



*"I haven't gone out with my parents since I was in high school. I used to think it was boring but now I cherish every moment with them."*  
- Lucy, 25, F, Chengdu

# trend in focus: new youth activism

We can't help but notice a big shift happening in China. Youth born before 1980 have a reputation for being self-centered, dependent and superficial. Born in an age of prosperity and enjoying the perks afforded only children, young people in China haven't been challenged much - until recently. Confronted by the outside world's opinions regarding Tibet, then the earthquake in Szechuan (May 12) and now the ban on plastic bags (June 1), youth are taking a more serious look at themselves, foreign brands and social action. Let's take a moment to pause and look at what these events mean to young Chinese.

## the environment

Spurred by the banning of free plastic bags in stores that took effect on June 1, China has been enthusiastically promoting a few environmental issues. While environmentalism as a trend is in its infancy here, we have seen some interesting incarnations. Youth-focused magazines and web sites have featured taste makers chatting up "green" activities.



# Coke suffers brand backlash

Iconic US brand urged to build stronger local ties after boycott in Malaysia over Israeli attacks in Gaza

By Kenny Lim

**KUALA LUMPUR** Coca-Cola needs to raise its local relevance following a wave of boycotts in Malaysia over US support for Israel's attacks on Gaza.

The brand, say industry sources, has not done enough to present itself as a local operation. Ismael Elmoutasafti, CEO of The Brand Union's Southeast Asia Hub, said Coke required a longer-term approach than it has so far adopted, pointing to action taken by McDonald's including partnering with schools and other CSR activity. "As evident from this episode, brands these days have to do more to be a part of a country's social, cultural and economic climate."

Another regional PR agency CEO argued that Coke should start leveraging on local communities and meetings, such as "local mosque heads and Malay lan-



Coca-Cola... has to do more to fall in step with a country's social, cultural and economic climate

guage publications and blogs" to do damage control.

Over 2,000 Muslim restaurants in Malaysia have pledged to remove Coca-Cola

from their menus as part of a boycott of US products. The nationwide boycott is led by the Malaysian Muslim Consumers Association with sup-

port from the Muslim Restaurant Operators Association.

Besides Coke, 100 other US brands including Starbucks, Colgate and McDonald's

could be caught up in the ac-

**In Malaysia, expectations for global brands at the local level are higher than ever**

*"People must act.. They won't die if they don't drink Coca-Cola".* Former Malaysian Prime Minister Mahathir Mohammad calls for a boycott of US products in a protest against Israel.

due to US foreign policy. He said stressing the local nature of its business is the right approach. "When people realise how important these brands are to their economy, the boycotts will stop."

See Opinion 1, page 21



Current challenges are putting a premium on positive thinking globally.



Pepsi's new logo is all about unadulterated positivity.

JOY

LOVETC.

GOOD DAY

OPTIMISM

LOVE

ONE FOR ALL

YouTube

YouTube

YouTube

HAPPY 2009



ALL FOR ONE



# HALFULL

**People are yearning for more positivity, reciprocity and gratitude from others, themselves, designers, CEOs, businesses and brands.**

“Halfull” by Kay Rosen



# Goodalism (the opposite of vandalism)

Graffiti knitting



\* Coined by Bates 141



# Voluntourism

Ritz-Carlton's Give Back Getaways program gives hotel guests the opportunity to volunteer their time to improve and assist the local community in which they are vacationing.



Hunger and Poverty Relief



Environmental Conservation



LOCATION



REGION



Every Tuesday, Thursday and Saturday



Save the Corals

Bali

Asia-Pacific

Daily upon request. Advance reservations require



Guardians of Sierra Blanca

Marbella, Villa Padierna

Europe

Wednesday, January 21, 2009



Giving Children Hope

Rose Hall, Jamaica

Mexico, Caribbean, South America

Friday January 23, 2009



Blue Iguana Recovery Program

Grand Cayman

Mexico, Caribbean, South America

Friday January 30, 2009



Blue Iguana Recovery Program

Grand Cayman

Mexico, Caribbean, South America

Saturday, January 31, 2009



Cooking For Those in Need

Georgetown, Washington D.C.

North America - North East

Saturday, January 31, 2009



Malaysian Rainforest Preservation

Kuala Lumpur

Asia-Pacific

Fridays in February



Blue Iguana Recovery Program

Grand Cayman

Mexico, Caribbean, South

Saturday, June 6, 2009



The Greening

Saturday, February 7, 2009



Plant Life to

Saturday, February 7, 2009



Music Therap

About Us  
 Our History  
 Our Standards  
 Our Mission  
 Our Values  
 Our People  
 Our Partners  
 Our Impact  
 Our Future





# FLASH MOB

Presumptive Republican Presidential Nominee

## John McCain

Promises us 100 years of WAR

## STOP McCain

Friday June 20th, 2008 from 11am to 2pm  
John Mc Cain will be at the Chateau Laurier  
1 Rideau Street, Ottawa, Ontario Canada  
McCain is a WAR CRIMINAL!

The convergence of media is going to make it possible to instantly and cheaply organize, raise money, or gain attention anywhere in the world.

**Flash causes**


McCain is a WAR CRIMINAL!  
Do you want a war criminal here?

FLASH MOB

# Crowdsourced cleaning effort

In 2008, Denmark's Roskilde Festival promoted the slogan "Less Trash—More Music" in its effort to control the leftover garbage. Special red garbage bags were handed out to festival-goers with rewards for each bag collected.



<p>NYTIEDER</p> <p>ORDDAG 23.08.08</p> <p><b>GET A TENT - HØB ET OPSLÅET TELT *</b></p> <p>Prøv Roskilde Festival's Get A Tent-ordning, hvor dit telt er slået op, når du kommer, og du har ubegrænset adgang...</p>	<p>BANDØNSKER</p> <p>Helst er hands kunne du tænke dig at se på Roskilde Festival 2009? I hele januar måned kan du ønske dine favoritter.</p> <p><a href="#">SEND BANDØNSKER</a></p>	<p><b>GREEN FOOTSTEPS</b></p> <p>Sæt dit grønne fodspor på Roskilde 2009</p> <p><a href="#">LÆS MERE</a></p> 
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## Crowdsourced cause ideas

Last year, Google launched Project 10100, encouraging the public to submit ideas that help other people, with the most helpful concepts eventually being implemented with a share of USD 10 million.

Project 10<sup>100</sup>

**May Those  
Who Help  
The Most Win**



Your daily commute.  
Your cause + our sponsor = rewards



## Micro fundraising

+3 network combines exercise and charity and helps consumers get corporate sponsorship for their everyday exercise activities. Every effort becomes a fundraising effort for the cause of their choice.

Not a Member Yet?

Keep me signed in

1. get fit

2. get connected

3. get results



**Track + Log**

- Log Activities
- Track Stats
- Share Activities



**Community**

- Invite Friends
- Plan Events
- Share Commitments

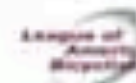


**Rewards**

- Support Causes
- Raise \$ w Miles
- Earn Rewards



**Sponsors**



We provide willing Sponsors to support worthy Causes.

## Give to get

Orange RockCorps gives away free concert tickets to youth in exchange of a few hours of volunteering. "You can't buy a ticket, you have to earn it".

Orange  
**ROCKCORPS**

 Sign In

 Join up now

[Home](#) [What is Orange RockCorps?](#) [The Collective](#) [The gig](#) [Latest news](#) [Sony Ericsson comp](#)

Orange  
**ROCKCORPS**  
**Give, Get Given**



# Good

## Get to give

For each home it sells, California eco-urban design firm LJ Urban pays for a new home in Burkina Faso by funding the complete training of a local mason.



LJ Urban



# Being useful by sharing one's infrastructure

Cola life is Coca-Cola message in a bottle. Coca Cola use their extensive distribution channels in developing countries to distribute rehydration salts to the people that need them desperately.

# colalife

Home About About About About About About Alms and Objectives Get Involved Supporters [Subscribe](#)



## Let's Talk to Coca Cola About Saving Children's Lives

Our idea is that Coca Cola use their distribution channels (which are amazing in developing countries) to distribute rehydration salts to the people that need them desperately. Maybe by dedicating one compartment in every 10 crates as 'the life saving' compartment? >> [Find out more](#)

Image credit: Mariëtte Ernst

>> [Please join our Facebook Group](#)

[facebook](#)

## Latest News

- [From Communication & Learning to Collaboration - we can do it!](#)
- [More ColaLife Serendipity and Web 2.0 Magic](#)
- [First Edition ColaLife Cards on eBay!](#)
- [Introducing the AIDPOD concept](#)
- [ColaLife on BBC \(UK\) National Radio \(27/12/08\)](#)





## Design for the unprivileged

*"The majority of the world's designers focus all their efforts on developing products and services exclusively for the richest 10% of the world's customers. Nothing less than a revolution is needed to reach the other 90%".*

Dr. Paul Polak, International Development Enterprises.



# Generosity beyond charity

Red Bull Academy





# Brand gestures

Nike Game Changers is an online competition that challenges young social entrepreneurs to come up with ways to “leverage sport for positive social change in the lives of girls and women.”



# Goodvertising

Northland Professional outdoor apparel recently gave away free caps, gloves and scarves on roughly 50 billboards throughout the city of Graz. Lucky passers-by could snag a free accessory as well as the chance to try it out and tell everyone about it.



... TESTED UNDER EXTREME CONDITIONS...



# Upbeat advertising

Certain brands have decided to poke fun at the recession... to avoid a global depression





# Upbeat advertising

Australia is using the recession to make a point about eating Lamb Chop. The effort is part of an overall 'Ode to Lamb' campaign that has been running for years.



# Giving randomly

Leading Chinese e-tailer DangDang.com gives back to its customers—and encourages their vigilant attention to the site—by randomly assigning one hour a day as “Lucky Time” in which all purchases made within that hour are free of charge.

The screenshot shows the DangDang.com website interface. At the top, there are navigation links for categories like '数码家电' (Digital Electronics), '美妆' (Beauty), '母婴' (Mother & Baby), '服装服饰' (Clothing), '家居' (Home), '运动健康' (Sports & Health), and '食品' (Food). A search bar and a '搜索' (Search) button are visible. A prominent banner across the top reads '以下订单也免运费!' (Orders below are also free shipping!).

Below the banner, there are several promotional blocks:

- 全球最大中文网上书店** (World's largest Chinese online bookstore): Promoting '社科类图书' (Social Science books) and '先贤智慧融入心灵' (Ancient wisdom融入心灵).
- 2008年度畅销榜隆重揭晓** (2008 Bestselling List Grand Reveal): A large red banner announcing '书碟Top10全场7折封顶' (Top 10 books and discs, 70% off). It mentions '源于当当网顾客的实际购买数据!' (Based on actual purchase data from DangDang.com customers) and '官方非山寨榜 实力决定畅销' (Official, not山寨 list; real power determines bestseller status).
- 当当公告** (DangDang Announcements): A list of updates including extended customer service hours, domestic expansion, gift cards, and new book releases.
- 积分+折上折** (Points + Discount on Discount): Promoting membership benefits like '普通会员' (Regular member) and '银卡' (Silver card).
- 图书频道** (Book Channel): A sidebar with categories like '少儿' (Children's), '文艺' (Arts & Literature), '外语' (Foreign Language), '青春' (Youth), '计算机' (Computer), '社科' (Social Science), '原版书' (Original books), and '管理' (Management).
- 促销专区** (Promotional Area): A grid of product promotions including:
  - Accounting textbooks: '会计职称教材 辅导书 热销' (Accounting qualification exam textbooks, popular).
  - Office 2007 software: 'OFFICE2007 限量发售 199元' (Limited edition, 199 yuan).
  - Author Xu Qian's book: '徐睿领衔《乐宴》全国独家' (Led by Xu Qian, 'Le Yan', exclusive nationwide).
  - Obama's book: '【社科】奥巴马最新亲笔力作' (Social Science, Obama's latest handwritten work).
  - Foreign books: '【外语】外语精品每套7书49折' (Foreign language, premium set of 7 books, 49% off).
  - Anti-virus software: '【杀毒】瑞星最新杀毒软件低价' (Anti-virus,瑞星 latest anti-virus software at low price).
  - Youth novels: '【青春】青春小说新书榜低至50%' (Youth, youth novel new book list as low as 50% off).
  - Gift books: '【文艺】礼品图书专场59折封顶' (Arts & Literature, gift book special 59% off).
  - DVDs: '【DVD】变形金刚完整版89元送' (DVD, Transformers complete edition 89 yuan gift).
  - Sichuan cuisine: '全球独家德川家康豪华精装版' (Global exclusive, Dechuan family luxury edition).
  - Wujiuqi: '《五味俱全》58折' ('Wu Jiou Qi' 58% off).
  - Loveitda kitchenware: '爱仕达厨具三件套 特价99元' (Aishida kitchenware 3-piece set, special price 99 yuan).
  - Li Yuchun CD: '李宇春N+1珍藏版 现货发售' (Li Yuchun N+1 collector's edition, on hand).



# ChangeWords



## Voluntourism

Is a new form of tourism, where travelers take time out of their vacation to improve and assist the local community that they are visiting.

## Goodvertising

Is the use of traditional advertising outlets, e.g. billboards, to distribute free merchandise to passers-by.





## Brand ChangePoint Opportunity

While attitude was all about having, gratitude is about being and giving: being more grateful, more generous, more in tune with people and one's environment.

As people lose their jobs and faith in consumerism, brands would be well advised to thank people for their business. It is time to shift 'loyalty programmes' to 'caring programmes' and for brands to also show more gratitude vis-à-vis their customers. As activism becomes mainstream, big ideas and big ideals are just not good enough, one needs big actions. Marketing is about what you do not what you say. To become a truly caring brand, companies will need to create products, services and systems that question the traditional approach of buying and private owning and instead encourage sharing and leasing.



# From high tech To slow tech



## The Change

*Technology has infiltrated every aspect of consumers' lives, to the extent that now many feel that they are over-reliant and over-expectant of high tech gadgetry. It is cluttering their lives and becoming a nuisance.*

Slow tech is the response. Following the 2009 fashion trend towards sobriety, tech design will begin to simplify and draw inspiration from rusticity and nature. New products will be simple and timeless in character ensuring technology will again complement the lives of consumers, rather than dictate them.



## Expecting too much from technology

With the proliferation of technology into every aspect of their lives, consumers often looked to technological advances to better their life.





## Depending too much on technology



The typical business travelers bag is cluttered with gadgets, cabling and peripherals, making previously simple tasks more complicated.

“By living outwardly more simple, we are inwardly more rich.”

Duane Elgin, Founder, Voluntary Simplicity Society



72% of US Consumers wish to ‘de-clutter their lives’

Source: BrainReserve Research, 2008



Simplicity sells





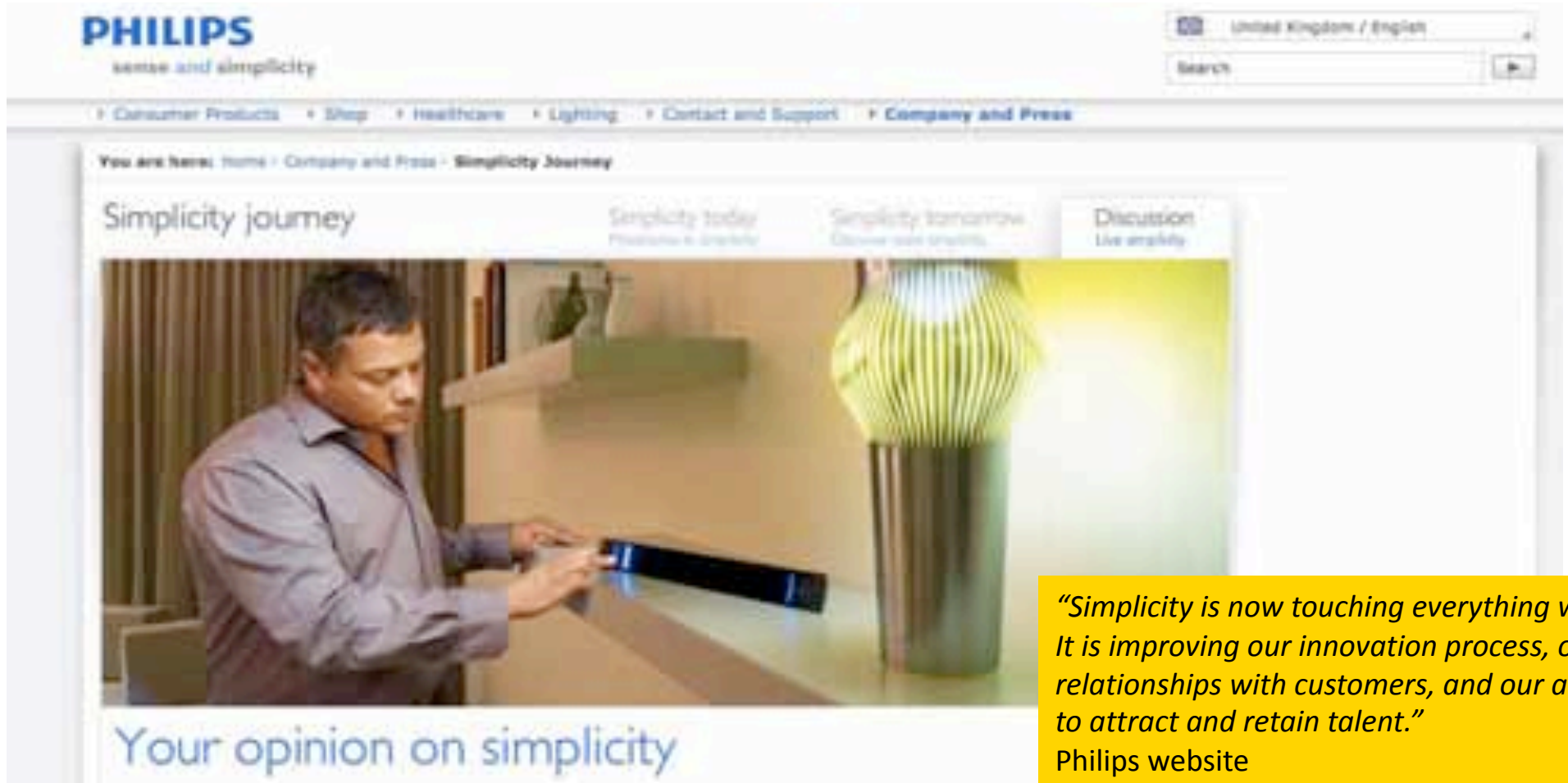
*iPhone by Jonathan Ive and calculator by Dieter Rams*

## Simplicity is timeless

Simplicity was not invented by Apple, it has always been the mantra of designers. However, more than any other tech company, they have embraced it.

# Simplicity is being embraced

Philips have repositioned their offering around simplicity and earthliness. Only products that enable simple living are released onto the market, and consumers are crowdsourced for their opinions on simplicity via their website.



**PHILIPS**  
sense and simplicity

United Kingdom / English

Search

Consumer Products | Shop | Healthcare | Lighting | Contact and Support | Company and Press

You are here: Home > Company and Press > Simplicity Journey

Simplicity journey

Simplicity today  
Philips is simple

Simplicity tomorrow  
Glowing with simplicity

Discussion  
Live simplicity

Your opinion on simplicity

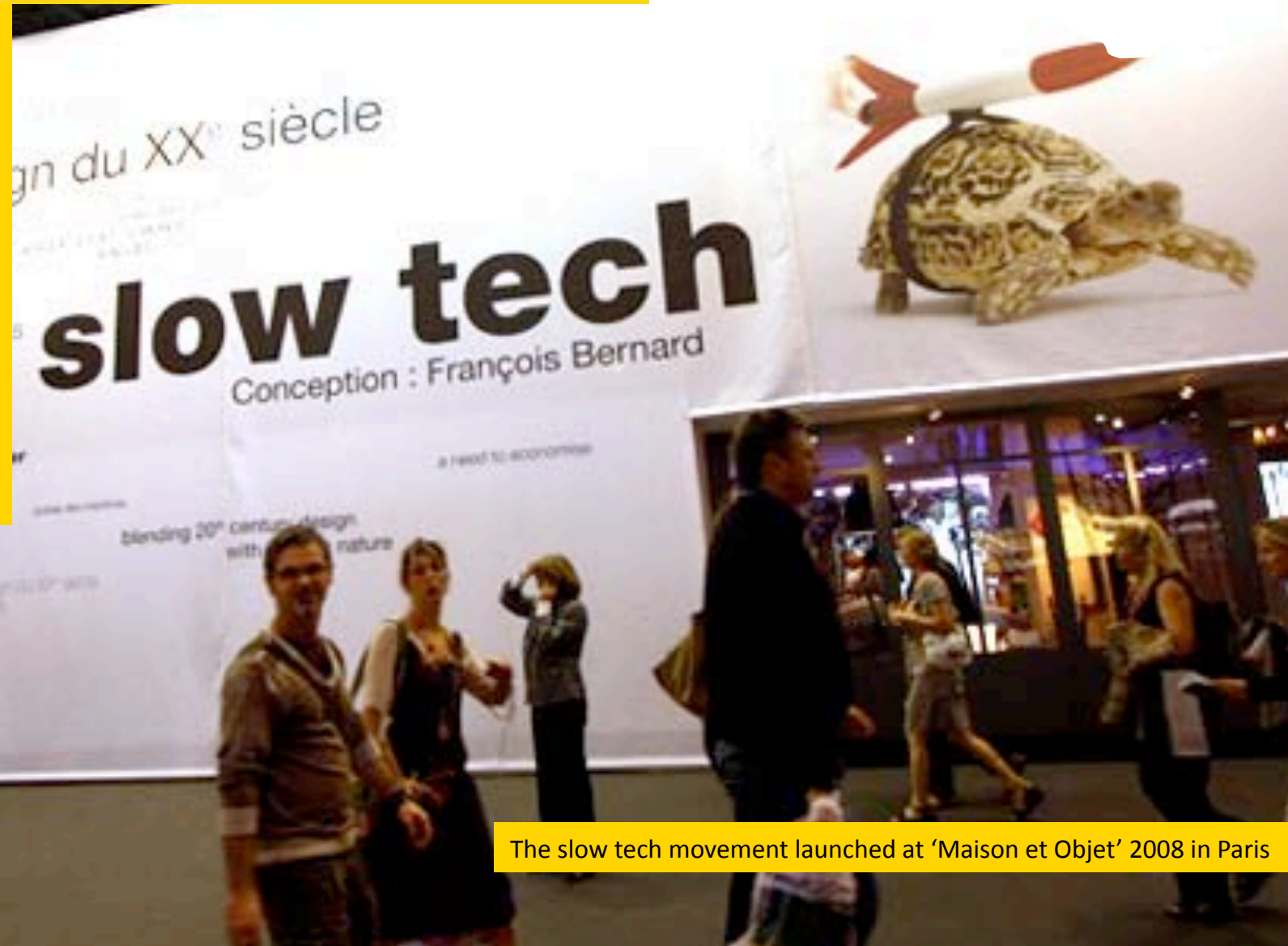
*"Simplicity is now touching everything we do. It is improving our innovation process, our relationships with customers, and our ability to attract and retain talent."*  
Philips website



## Ultimate simplification: The birth of slow tech

*“Less speed for better living. Taking a break in a dematerialised world. Soft, fluid technologies revisit naturalness and a simplified life philosophy. Style is also inspired by the industrial aesthetics of last century’s designer-engineers. Heavy, peaceful forms cultivate a solid, reassuring elegance. The house is taking on depth and weight, worlds away from the ready-to-discard.”*

François Bernard on Slow Tech



The slow tech movement launched at 'Maison et Objet' 2008 in Paris

## Timeless tech: The Rationaissance

The rationaissance is, according to David Report, a new direction in design that aims to create simple, timeless technology that people enjoy spending time with. It aims to exude simplicity by hiding the technology buried within objects.



Vintage record player by Dieter Rams for Braun

## Rusticity makes things look simpler

Even advanced software such as Photoshop can be made to look simple when distilled down to their bare simplicity, as this award-winning Bates 141 ad shows.



## Rustic tools for a simpler life

Slow tech de-clutters lives bombarded with high-tech complications. It is design's take on sobriety in 2009.



# Making technology more human

Slow tech draws inspiration from nature to add warmth to traditionally cold technology.





## Technology inspired by nature

'Calm tech' takes its inspiration from the wider world, and aims to be less interfering than high tech. This allows people to live a more harmonious life.

This alarm clock makes no sound. Instead, it wakes people from their slumber by imitating the sun and filling rooms with light.





## Slow tech gives people time to think

Technology design *'should leave room for imagination and evoke poetic interactions'*  
Loris Vangelder, Slow tech designer.



# ChangeWords



## Slow tech

Is a new category of soft, fluid technologies that are easier to use, more natural and tactile and aim to be less interfering than high tech.

## Calm tech

Is a kind of technology born from slow tech, that promotes natural, calmer technologies (e.g. sun light) to promote harmonious living.



## Brand ChangePoint Opportunity

It's much easier to make something complicated than to make something simple. And right now, there's so much going on in consumers' lives, much of it driven by tech, that there's a huge desire for simplicity.

Technology that clutters and requires extensive instruction manuals is out. Functionality and simplicity are in. Brands should not focus on the bells and whistles of technology, rather sell their simplicity. Time and time again, research shows that consumers only use 10% of a given technology due to its complexity – which brand will do something about it first?

Brands should also challenge themselves to think differently about “innovation”. To consumers, more natural, calm and harmonious technology might just be the latest advancement they've been waiting for.



# 10

**From second life  
To augmented reality**





## Virtual aesthetics are entering the real world

Computer icons are now part of pop culture and the everyday design language.





# Virtual goods can now become real

With GetThemIn, Facebook users can send real flowers and candy to their virtual friends.



- 1 You choose & buy a gift for a friend on Facebook
- 2 They receive a message announcing your gift
- 3 They visit a participating store to collect the gift > More



**SEND REAL GIFTS**  
BUY BEER / WINE / CHAMPAGNE AND MORE

REDEEM THEM AT OVER 1500 PARTICIPATING STORES FOR THE REAL THING!

NOW LIVE ON **facebook** > GO

### USE IT NOW ON FACEBOOK IN THE UK

We were fed up a long time ago by virtual "fun" gift applications so we thought we'd do something about it - visit the GetThemIn facebook application and start sending your UK friends gifts they can actually use.

### COMING SOON...

In addition to off-licences, we're currently working on making our products available to redeem in bars. We're also working to launch variations of the application on



**ParcelPoke**  
Send a real gift instantly without needing a postal address.



Peggy Mail allows people to send real postcards through snail mail.



PEGGY MAIL

Send With Peggy.com



Hello, welcome to Peggy.

We want to make it easier to keep in touch with friends and family, even those who don't use computers.

Use Peggy to send postcards from facebook, yep real postcards by post. Plus every postcard send comes with a pre-addressed, pre-stamped reply.

For the time being it's free to send postcards - but we can only send to addresses in the UK and Ireland.

Click here to install  
Peggy Mail for facebook ...

facebook

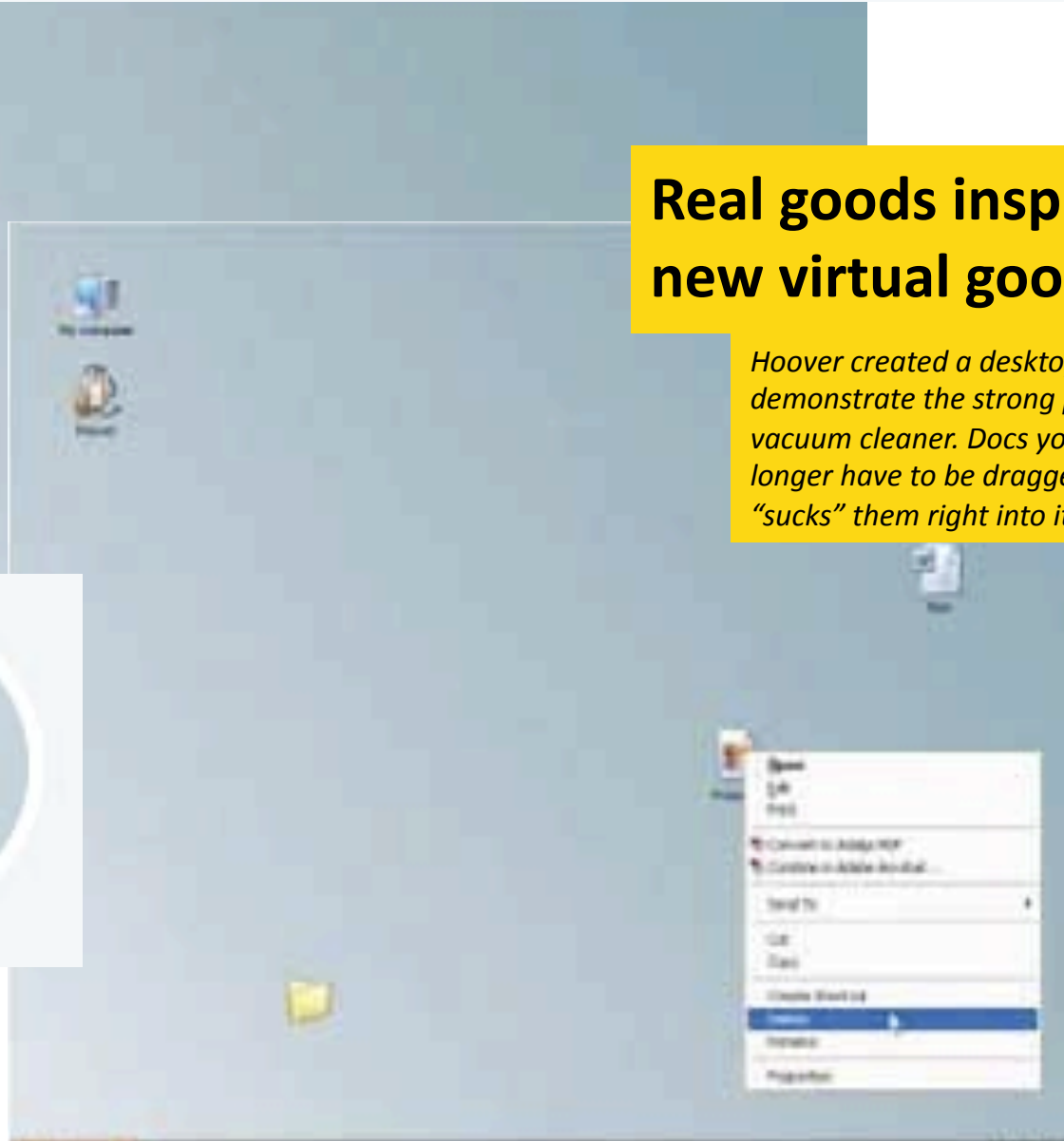
### The Peggy Story

Peggy is inspired by a real life Peggy. The real Peggy finds it difficult to get out of the house these days. She says she really misses "the buzz", yet all her younger family are in "the buzz" keeping in touch on Facebook and other social networking tools. It seemed crazy that they couldn't connect so we invented the Peggy service: a way to keep in contact that's convenient for them and works for Peggy too.

# HOOVER DESKTOP VACUUM CLEANER

## Real goods inspire new virtual goods

*Hoover created a desktop vacuum cleaner to demonstrate the strong power of the Freemotion vacuum cleaner. Docs you want to remove no longer have to be dragged to the bin the Hoover "sucks" them right into it.*







## The “Internet of Things” is now available

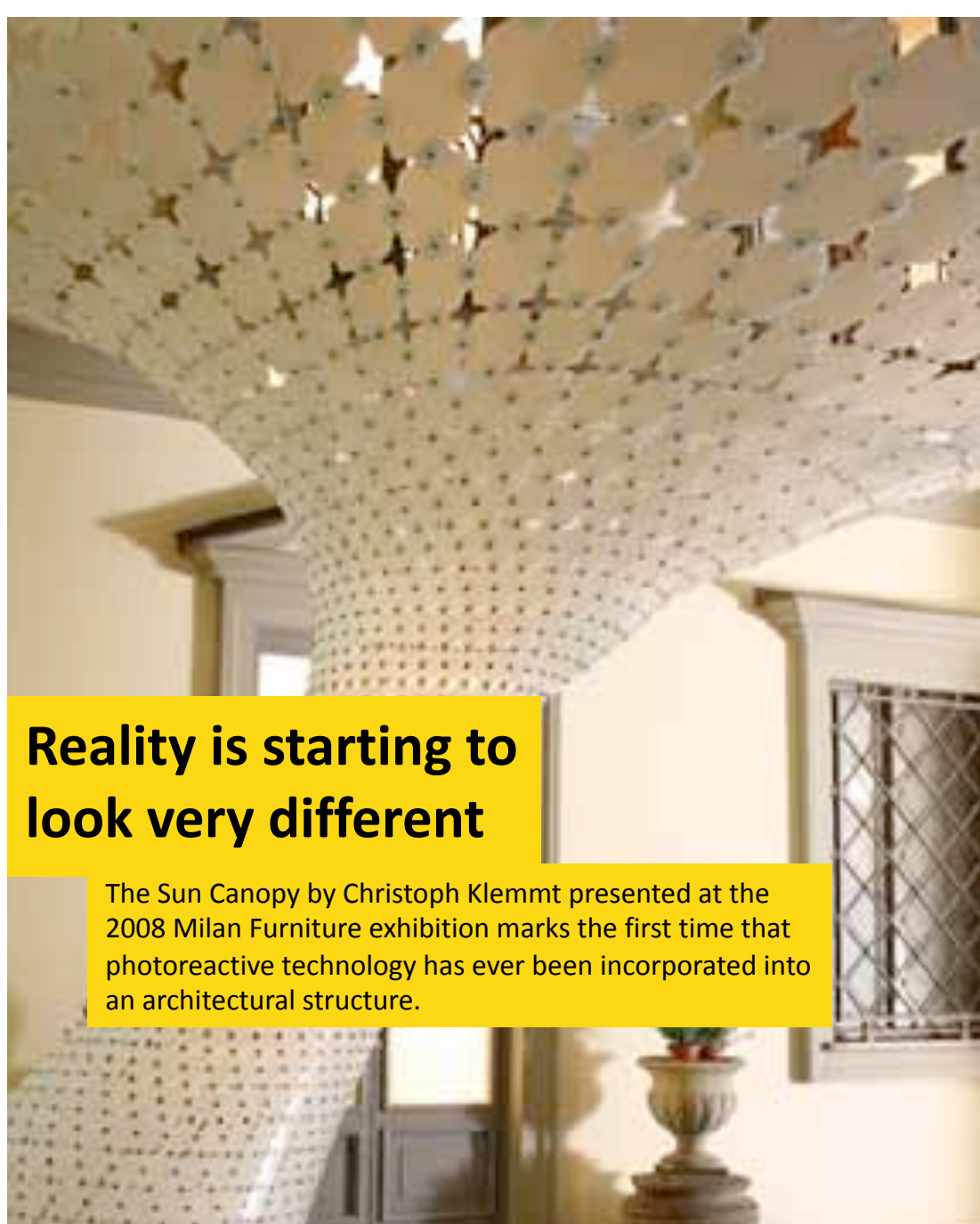
Tikitag service enables anyone to link anything to the online world using RFID. The service enables people to tag real world objects like business cards with an online webpage or applications and to make them accessible with a single touch.



## Online moves offline

Tony Player is an online music service that creates a timeline of the music people listen to online. Users can share their timelines and discover new music. Tony Player, builds playlists from multiple timelines. When members arrive at a club that uses Tony Player, the tracks they've most recently listened to can be imported to the DJ's playlist.





## Reality is starting to look very different

The Sun Canopy by Christoph Klemmt presented at the 2008 Milan Furniture exhibition marks the first time that photoreactive technology has ever been incorporated into an architectural structure.





## Experiencing a new reality

At the dark restaurant in Beijing, people eat in total darkness. Waiters wear night vision and mobile phones or even luminous watches are prohibited.

By starving the sense of vision, your other senses are stimulated to full alert and so the food tastes like it's never tasted before.



# Sneaking into someone's reality

HBO's "Voyeur" campaign had a massive outdoor projection onto the side of a building to reveal an interior rife with dramatic action.





## Creating a new reality

Spore is a video game that allows a player to control the development of a species from its beginnings as a unicellular organism, through development as an intelligent and social creature, to interstellar exploration as a spacefaring culture.

# SPORE

How will you create the universe?

Creator

Learn More

Game Overview & Information

PC GAMER

"91/100"



# Reskinned reality

Alternate reality mask concept from Frog Design will let people of the future escape the harsh reality of a doomed planet by augmenting or replacing what they see, smell, and hear with sensory inputs of their own choosing. Inspired by the idea of making the world appear a better place, this shows how the times we are living in are troubling.



## 3D is now an advertising reality

The ad for the new MINI Cabrio directs you to a website that renders a 3D model of the car if you place your magazine in front of a webcam. It's like a miniature showroom in the palm of your hands.



[WWW.MINI.DE/WEBCAM](http://WWW.MINI.DE/WEBCAM)





## 3DTV to become mainstream

Where several years ago the latest television sets were hailed as “HDTV ready”, a handful of TV makers are now touting models that are “3D ready”.

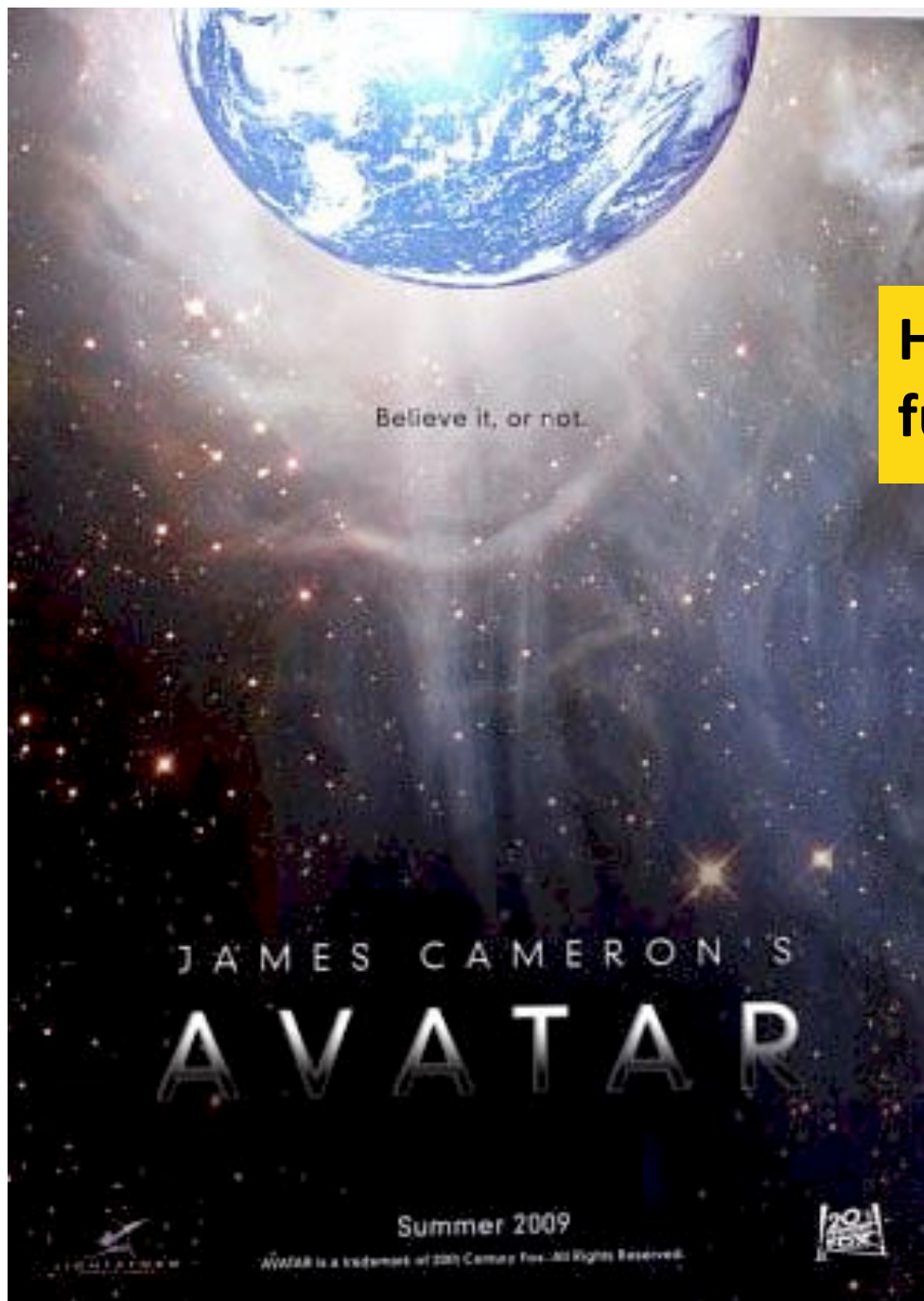






## 3D is becoming a mainstream production technique

The cast of Beowulf included real celebrities like Angelina Jolie and Anthony Hopkins but the whole movie was computer generated instead of being shot on film. It was available to be viewed in IMAX 3D and standard 2D format.



## Hollywood is banking on 3D for future blockbusters

Desperate for anything that can revive its dwindling fortunes caused by the collapse of home DVD sales, Hollywood hopes "Avatar" by James Cameron — the first of a string of 3D blockbusters— will kick-start the home-3D trend.



## Alternate Reality Gaming (ARG) is becoming pervasive

Carcade! is an "augmented reality in-car videogame" designed by art students in Berlin. Using a webcam, the landscape is captured and incorporated into the game itself, letting you navigate your urban environment with a little spacecraft.

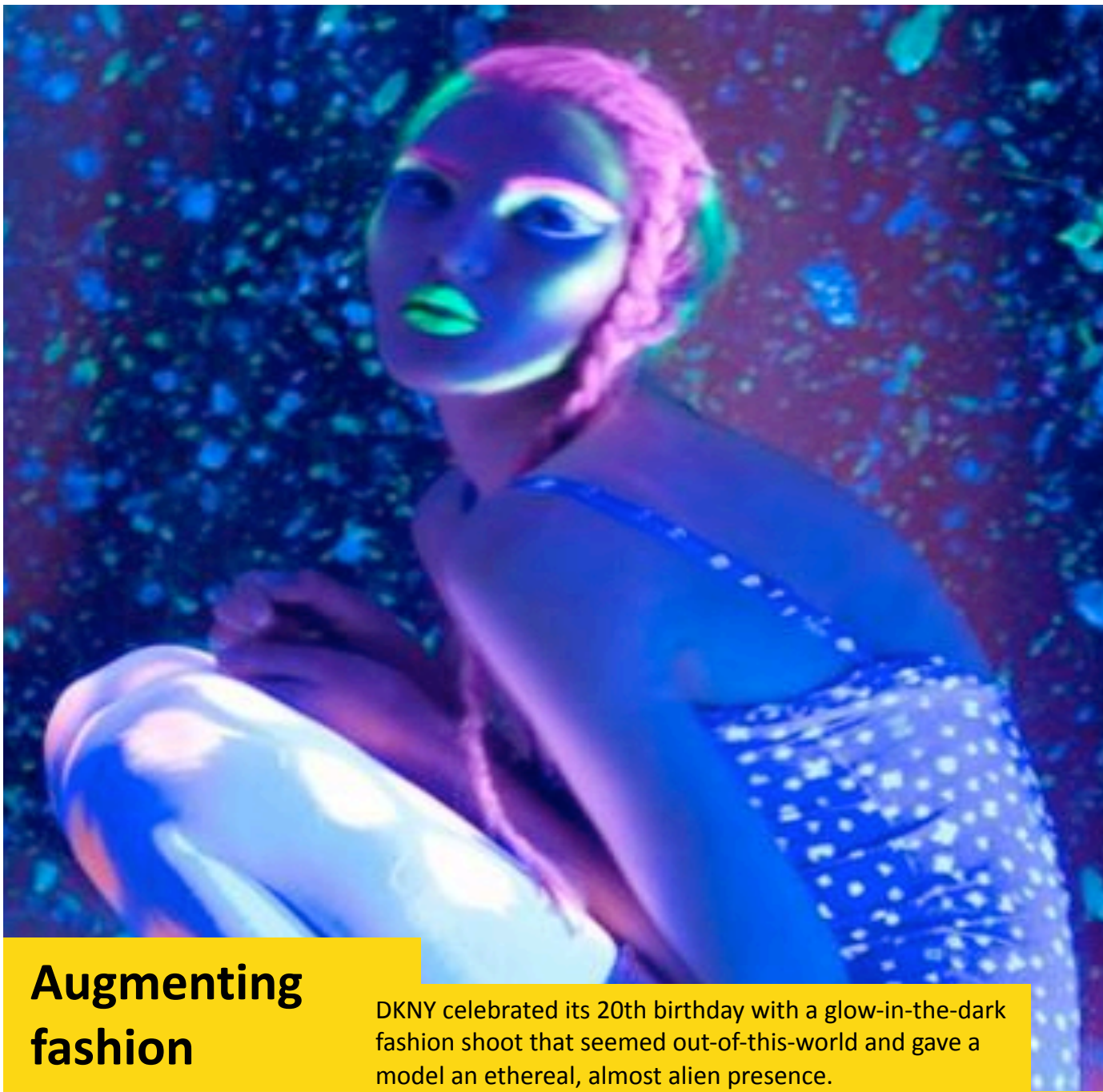




## Alternate reality is augmenting visual culture

Radiohead's new video for "House of Cards", did not use no cameras but some 3D plotting technologies that collected data about the shapes and relative distances of objects and people to come up with the images.





## Augmenting fashion

DKNY celebrated its 20th birthday with a glow-in-the-dark fashion shoot that seemed out-of-this-world and gave a model an ethereal, almost alien presence.



This skeleton tattoo is invisible in normal light, but visible under black light





# Augmenting participation to causes

“Operation: Sleeper Cell” is a spy-themed puzzle game in aid of Cancer Research UK which is part of the “Serious game movement”.

## OPERATION: SLEEPER CELL

in aid of  
CANCER RESEARCH UK

[faq](#) / [register](#) / [log in](#)

GRID

HOW TO PLAY

MISSIONS

DONATE

COMMUNITY

ABOUT

The Agency's Operation: Sleeper Cell raised a total of **£3,638!**

Operation: Sleeper Cell has now ended. The Agency wishes to thank all Agents for their sterling work in bringing down the E.V.I.L. empire.

### Agent login

Agent name \*

Password \*

[Log in](#)

- [Become an Agent](#)
- [I forgot my password!](#)

### Top teams

Team	Score
Marsh-Ayre	18750



## Augmenting music

Year Zero is an arty alternate reality game (ARG) based on band Nine Inch Nails concept album of the same name. Year Zero takes place in 2022 and "could be about the end of the world". The marriage of the pop and gamer aesthetics provide a new avenue for artistes to express themselves and new ways for labels to merchandise artistes.





# Augmenting movies

For The Dark Knight's viral campaign, 45 fans were recruited to join Joker's army, each receiving a cake in which a hidden cell phone could be used to call for the next clue.



SOME JOKES ARE MEANT  
TO BE FUNNY, BUT HE ISN'T.

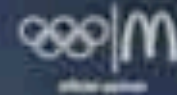
RADWORKS™ 98  
radworks@yahoo.com  
http://www.flickr.com/photos/radworks/





## Augmenting branding

Launched for the 2008 Summer Olympics, “The Lost Ring”, revolves around a fictional Olympic sport that vanished 2,000 years ago and five athletes who have reappeared in the present. It was discreetly sponsored by McDonald’s.



### THE LOST RING

THANKS TO MILLIONS OF PEOPLE AROUND THE WORLD, THE QUEST FOR THE LOST RING WAS SUCCESSFUL. THE LOST SPORT OF OLYMPIA IS FULLY REVIVED, THE ATHLETES HAVE RETURNED TO THEIR HOMES, AND OUR WORLD IS SAFE ONCE AGAIN.

ALTHOUGH THE ADVENTURE MAY BE OVER, THE IMPACT OF THOSE WHO PARTICIPATED WILL LAST FOREVER.

[FIND OUT WHAT HAPPENED >](#)

## Augmenting dine-in

Seeking to capitalise on the success of the “World of Warcraft” in China, a Chinese businessman opened a restaurant inspired by the videogame.

### The World of Warcraft Restaurant Opened in Beijing





# Allstate®

You're in good hands.

## Augmenting business



AllState Insurance InSight program uses online videogame tests to identify safe older drivers. "Jewel Diver: Divided Attention", tests the player's ability to track multiple moving objects at once to extrapolate the user's competency to track many vehicles on the road.



# ChangeWords



## ARG

Is an alternate reality game that takes place in real-time, involves multiple media and uses the real world as a platform to tell a story that unfolds depending on participants' actions. Players often work as a community to analyze the story and coordinate real-life and online activities.

## Serious game movement

Is the use of video games for education and social purposes rather than pure entertainment.



## Brand **ChangePoint** Opportunity

Up until recently, marketers were learning about consumers' "real life" and their "second life", and how to communicate online or offline. Fact is, brands need to embrace the new complexity of "augmented reality".

By using virtual technology, games or 3D, brands can bring added value to consumers' everyday life, helping to educate as well as to entertain them. The divide between worlds is gone, and brands must not only gain a foothold in both, but try to improve one with the other.

# SAVE TREES!

## DO NOT PRINT THIS REPORT!

## READ IT ON YOUR COMPUTER SCREEN PLEASE

(AND REDUCE THE LUMINOSITY TO SAVE ENERGY ;-)

For more information, please contact:

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