

# THE EVOLVING TARGETS REPORT

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INTRODUCTION

Our lives are undergoing change in all areas. The diversity of lifestyles and interests is becoming increasingly independent of demographic characteristics such as age, gender or place of residence. People’s preferences change depending on their phase of life, and some even adapt their preferences to particular life situations. This new boundlessness is also reflected in consumer behaviour.

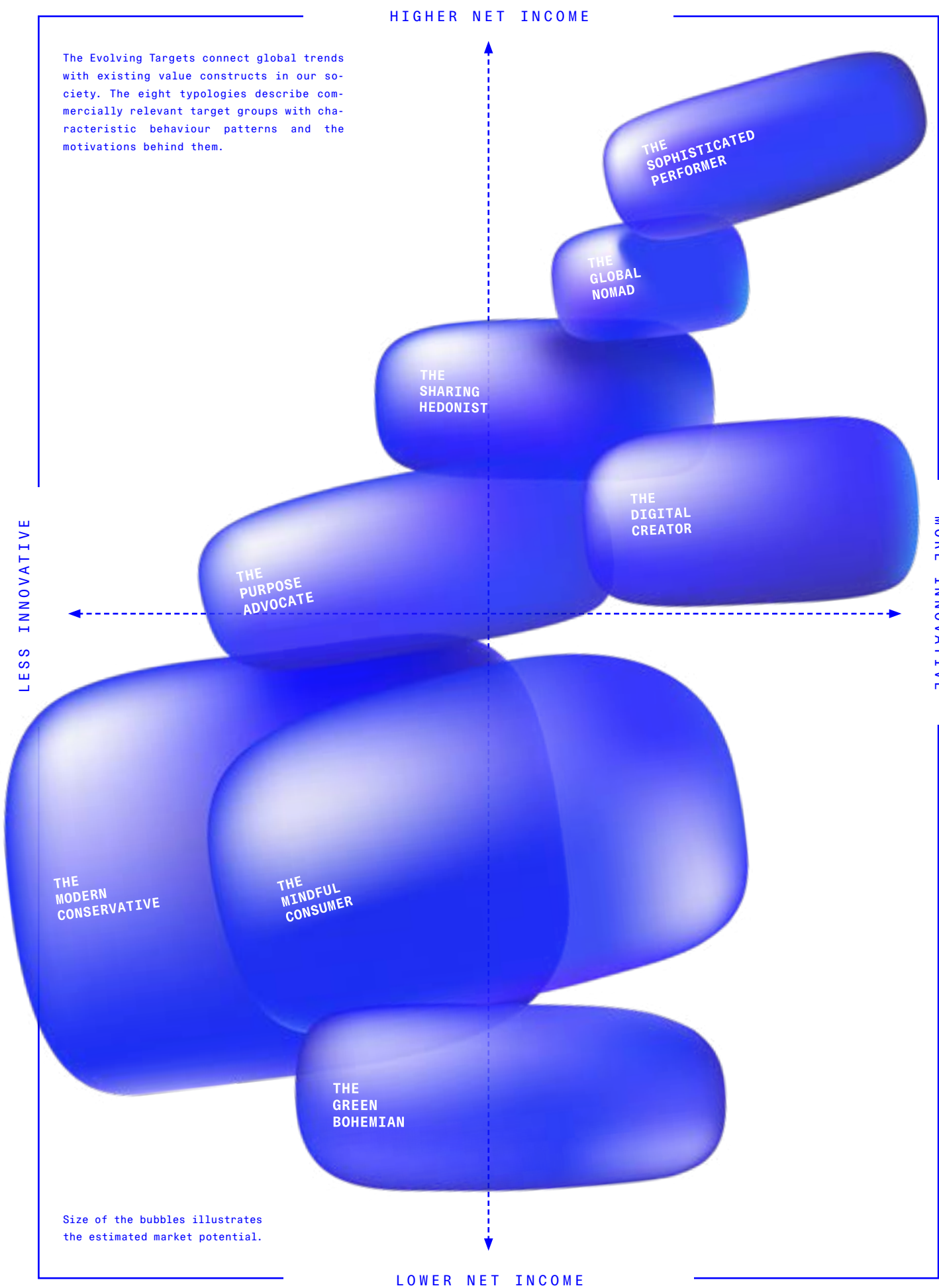
Each of our Evolving Target typologies interacts with the major developments in our society; they are both an expression and driver of megatrends. Just as the major trends of our time continue to evolve, the typologies we describe are also in constant flux. Through our group of Evolving Targets, we also recognise that people are not necessarily assigned to only one typology, and that their typologies may change depending on their situation.

In our meta-study we look at the global trends that influence our actions today, and particularly in the long term. We do not claim to replace other, already-established target group studies. Rather, we view our customer personas as supplementary tools for an empathetic perspective on potential target groups. This document is a snapshot that, like the Evolving Targets themselves, is continuously evolving and fed with new insights.

The crucial questions for us are: Which Evolving Targets do our brands and product ranges appeal to today? And how do we remain and become relevant to other emerging Evolving Targets? The answers to these central questions can offer relevant options for today’s shifting consumer preferences.

Companies have long been selling more than just products or services. They sell brands and, most importantly, value constructs with which consumers want to identify. In this way, constellations arise in which even demographically diverse individuals merge into a uniform target group that places the same demands on a company. This means that in the future, innovations and strategies must not only be oriented towards demographic target groups but towards cross-demographic value-driven communities in order to be successful in the long term.

THE EVOLVING TARGETS MAP



GLOBAL DEVELOPMENTS

Our society is continuously subject to a multitude of developments and currents. The most noticeable of these are the shorter-term phenomena, such as changing trends or attention-grabbing hypes. In these cases, we can easily put the change into the context of the status quo and immediately perceive it. Usually, the impact of these changes is short-lived or is supplemented or even replaced quickly by other changes.

Underlying these modes, hypes and micro-trends are the megatrends: strong currents that move slower, developing over decades and having a lasting impact on all areas of our lives. A clear understanding of the overarching tendencies in society helps us understand, classify, and evaluate short-term trends in this larger context. We will take a look at some of the larger trends below.

1. DIGITALISATION AND CONNECTIVITY

The megatrend of connectivity has formed the basis of global social change in the 21st century: comprehensive networking based on digital technologies. Connectivity is creating new behaviour patterns, cultural forms and lifestyles – and a new economy. Digital technologies enable the disruption of entire industries and artificial intelligence drives digital transformation in living and working environments. The socio-human dimension is crucial, i.e., the way people use new technologies to fulfil their own needs and goals.



2. KNOWLEDGE SOCIETY

Access to knowledge has never been as easy as it is today. At the same time, the importance of critical thinking and the competencies required to understand complex contexts are growing. Dealing with crises, uncertainty and complexity is becoming a skill of the future. Education in the future is no longer conceivable without digitalisation. Professionally, open knowledge and free creativity will determine everyday working life. In dealing with knowledge, the focus is changing: it is not the knowledge itself that is decisive, but rather the way in which knowledge is managed.



3. GLOBALISATION

Whether poverty or hunger, climate or the coronavirus crisis, the dark sides of globalisation are more present than ever. At the same time, the global sense of belonging has never been as strong as it is today. Movements like Black Lives Matter, #MeToo and Fridays for Future show that many people see themselves as part of an international community. Propelled by digitalisation, a new universalism is growing. Disenchantment with politics is real, especially among the younger generations, who, at the same time, also show a neo-politicisation.

#### 4. GLOCALISATION

The global economic system is characterised by interdependence and dependencies. The idea of a global economy is also determining the future. In parallel, the trend towards glocalisation is growing. By making greater use of local resources and production sites, companies are strengthening their resilience in the event of global disruptions. Glocalisation does not mean an exclusive shift towards the local, it also includes fair and transparent globalisation. In addition to transparency and the minimisation of risks in supply chains, the principle of the circular economy is coming into focus.



#### 8. MOBILITY

A new mobile society is emerging. Driven by a steadily growing number of innovative forms of mobility, tomorrow's society is not about mobility per se, rather, it is about the many ways of mobility. New products and services offer alternatives to cars, especially in urban areas. The need for flexibility is accompanied by an awareness of environmental protection, climate change and resource consumption.



#### 5. INDIVIDUALISATION AND 'WE CULTURE'

The megatrend of individualisation reflects the central cultural principle of the modern Western world: self-realisation through a unique lifestyle. The future, however, will include a second dimension: an individualised society. Here, the focus will no longer be exclusively on the autonomous self, but rather on the individual as a member of open communities. The individual defines themselves as part of a new 'we culture'.



#### 9. URBANITY

The global growth of cities continues. They remain the drivers of creativity and innovation. New living, working and consumption models are beginning to emerge in cities. With increasing complexity arising through the digitalisation of life, the need for smaller structures is growing. The city district is becoming progressively more important. At the same time, remote working is leading to increased urbanisation in rural areas. Lifestyles can no longer be clearly assigned to the urban-rural schema.

#### 6. GENDER SHIFT

Gender roles are losing their social relevance as gender becomes increasingly less important in determining the course of individual biographies and personal preferences. Women and men have new opportunities to shape their lives. Changing role patterns and breaking down gender stereotypes are moving the economy and society into a new culture of pluralism. Gender-specific approaches and offers are more frequently becoming inappropriate.



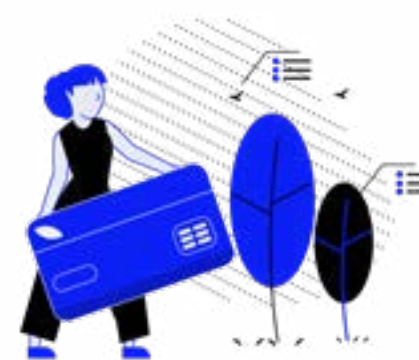
#### 10. HEALTH AND NUTRITION

Health is becoming recognised as a core value in society, and even more so since the coronavirus pandemic. Above all, nutrition and food production have a strong influence on both individual health and the environment. The paradigm of health and nutrition is shifting: in the future, it will not only be about the individual's health-conscious regimes, but also about a responsible form of nutrition that encompasses ecological, animal-ethical and social aspects.



#### 7. WORK-LIFE BLENDING

Work-life blending is beginning to replace work-life balancing. Digitalisation is merging work and private life and individuals are adjusting their daily routines to their individual situations. Working time is becoming more flexible and self-organisation is becoming the norm. New work concepts are transforming corporate offices into places of creativity, innovation, and a sense of togetherness.



#### 11. NEO-ECOLOGY

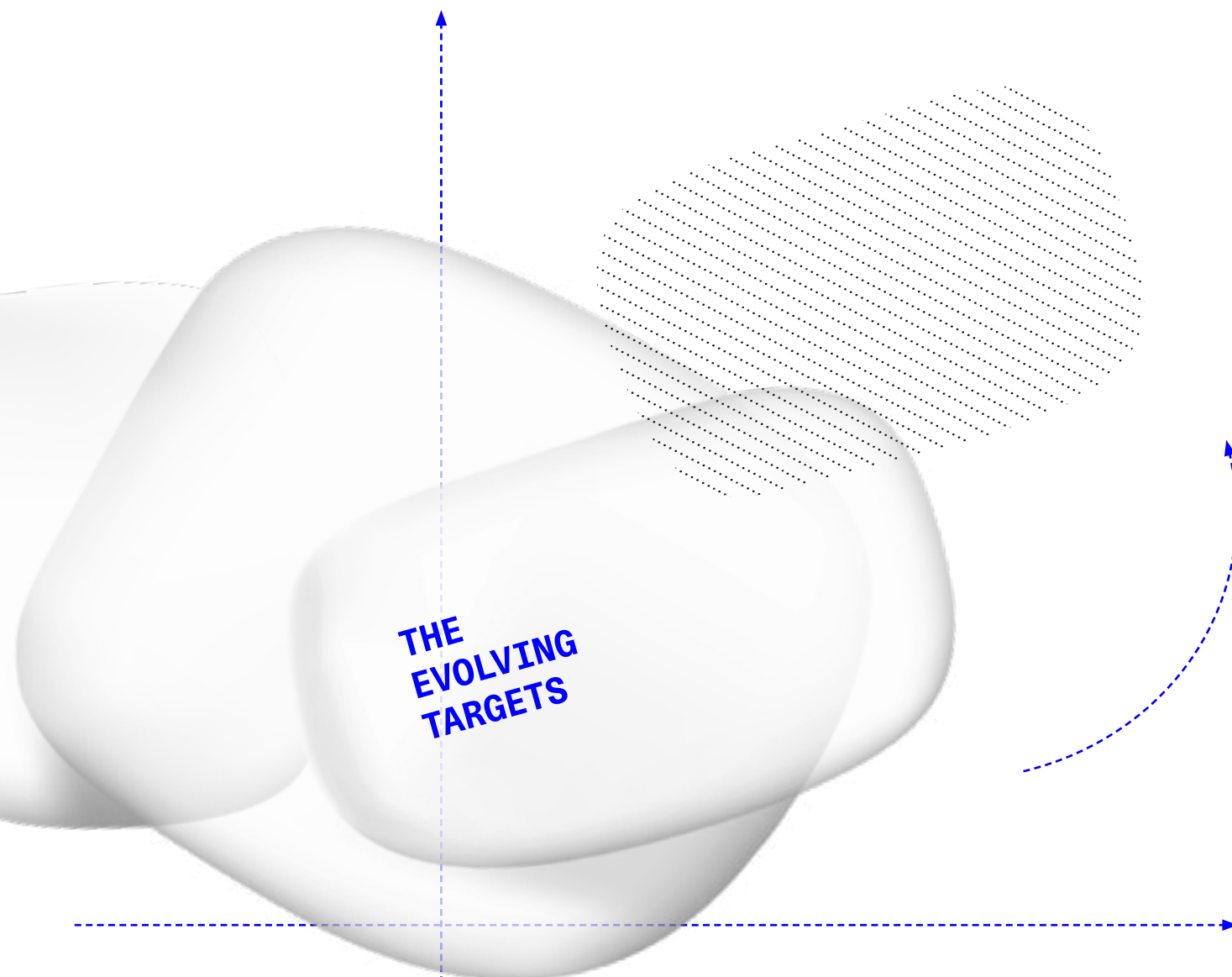
Environmental awareness has developed from being an individual lifestyle to a social movement. The neo-ecological megatrend is causing a realignment of values in the everyday lives of many consumers. A new sense of responsibility is growing. The core of neo-ecology involves a different way of consuming: away from the maxim of scarcity and towards an intelligent and sustainable use of resources.



## THE EVOLVING TARGETS

The characteristics of our Evolving Targets are based on a broad analysis of different trend and target group studies. They connect global trends with behavioural patterns in our society, placing these into a narrative.

The eight Evolving Targets are primarily an empathetic perspective on existing and emerging groupings within our society. They provide a fictional impression of the people behind the statistics. They shed light on their social environments, their life situations, and what motivates their behaviour.



## 1. THE DIGITAL CREATOR

### THE ENGINE OF THE CREATOR ECONOMY

Always online - the Digital Creator's everyday life takes place on the Internet. Yet they are much more than just consumers of digital content and services. They actively create content on social media and participate in online discussions. The Digital Creator is the professional evolution of the digital native - for them, technology is only a tool with which they create innovation, in both their professional and private lives.

Often those with large followings on social media have monetised it by promoting branded products. Today they start to develop brands on their own. From cosmetics or fashion lines to fast food chains with thousands of outlets, the creator economy provides their specially created target groups with the appropriate products - often with great success.

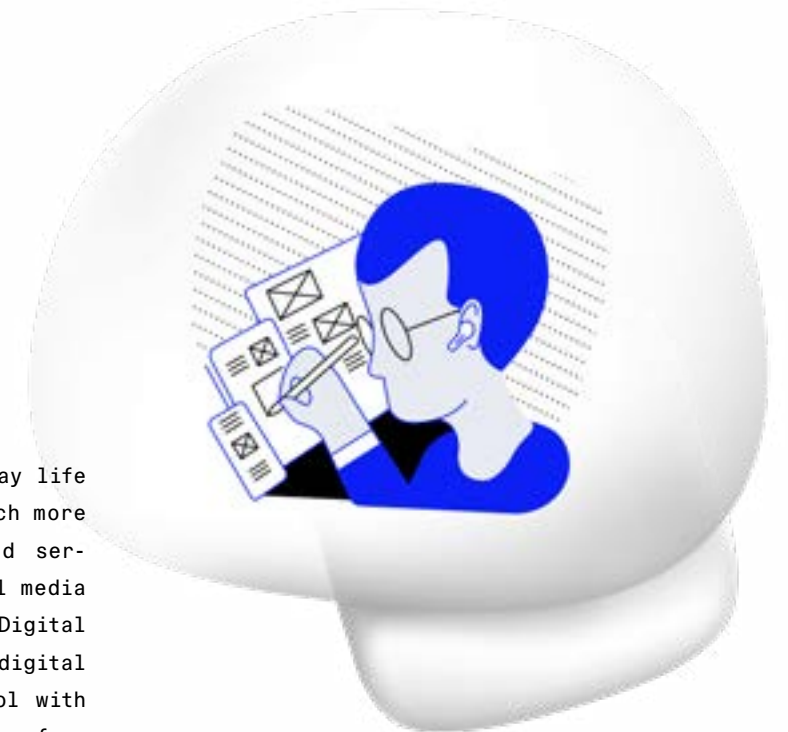
### TRY, EVALUATE, MULTIPLY

Digital Creators are early adopters of new technologies, services and products. Whether virtual or augmented reality, 3D printing, smart homes or cryptocurrencies, Digital Creators are among the first to buy and try out technological innovations. They share their opinions on these online, in expert forums, on community platforms or through their own blogs. This way they increase the perception and acceptance of the innovations in more technology-critical target groups.

POTENTIAL IN EUROPE  
DIGITAL CREATORS

**28 MILLION**

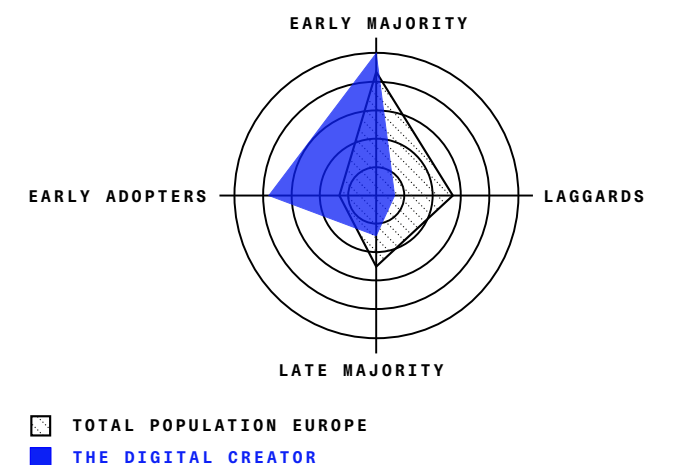
The Digital Creator has a pronounced affinity for art and culture, discovering music and films on independent streaming services. They prefer to spend their time learning about new ideas and creating them themselves. Things become really interesting for them when their creativity or their problem-solving ability is in high demand.



### LIBERTY AND EQUALITY RATHER THAN RIGID STRUCTURES

The Digital Creator relies on communities. They use tutorials, wikis, manuals and platforms to exchange problems, ideas and solutions with colleagues, acquaintances and friends. For them, their peers are nuclei of innovation and the yardstick of progress. In this way, they transcend the classic categories of expert and opinion elites. For businesses, one-sided communication based merely on a universal brand promise is no longer effective for the Digital Creator. They want both dialogue and inspiration.

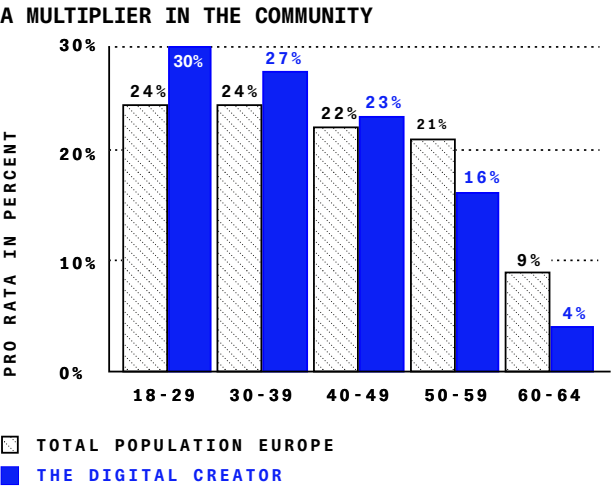
INNOVATION AFFINITY COMPARED TO EUROPEAN SOCIETY AS A WHOLE



This attitude also characterises the professional philosophy of the Digital Creator. They are generally not enthusiastic about rigid work-by-the-book

and top-down structures. For Digital Creators, the appeal of a job lies in exchanging ideas with others and growing through joint projects and tasks. Their curiosity, coupled with a passion for questioning ideas and always creating something new, makes them ideal employees in the network economy with its new technologies, business models and values.

AGE STRUCTURE COMPARED TO THE EUROPEAN POPULATION AS A WHOLE



Digital Creators need the community as a source of inspiration and feedback, and their circle of friends is correspondingly large. They also continually expand this circle by actively searching the Internet for those who share their interests. Although the Digital Creator is always online, they like meeting friends offline, and online acquaintances often become offline friends. There is no clear separation between the digital and the real worlds for Digital Creators – they know how to use the advantages offered through both.

AVERAGE MONTHLY NET INCOME/HOUSEHOLD

**DIGITAL CREATORS: € 3,589**

BASIS: € 2,554

The search for new ideas and the constant desire to expand their own horizons also dominate their consumer behaviour. Fashion, food, mobility, living, leisure, travel – Digital Creators are eager to experiment. This makes them ideal customers for innovative products, yet they are, at the same time, potentially harsh critics. Once the Digital Creator has been won over, however, their enthusiasm quickly

increases and their extensive networking guarantees a strong multiplier effect. As consumers, Digital Creators from Gen Z in particular need digital interaction and creative spaces. Helping to design new products via social media, showing them in action in their own videos, networking with other buyers – as consumers they become creators. The Digital Creator redefines status symbols and luxury; what counts are the values of the respective community – for example, the espresso experts, the bicycle enthusiasts, the sneaker fans. For the Digital Creator, status symbols are no longer universal. They are individual.

**2. THE SHARING HEDONIST**

**SHARING FOR A STRONG COMMUNITY**

They love excess and a grand entrance, they are always on the lookout for variety and entertainment, they even stage trivial parts of the everyday as an event. They are bored by routine and tradition; they are looking for experiences and adventures beyond the daily grind. ‘I want to have fun!’ is their motto: they are hedonists through and through. However, it is not the experience itself that is important – what is relevant for them is the communal experience within a group. The Sharing Hedonist is thus a representative of a new ‘we culture’ that defines the principle of individualisation in a radically different way, away from the limitations of ego and towards the development of one’s own individuality in a self-selected group.

POTENTIAL IN EUROPE  
SHARING HEDONIST

**30 MILLION**

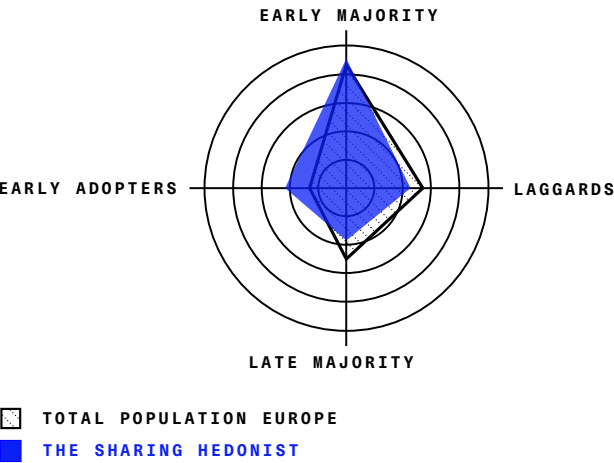
Sharing Hedonists seek, live and create community. However, this does not mean that they identify completely and permanently with any particular community. Their core group and most important point of orientation are their best friends and partners. Yet, depending on their phase of life, other communities can also be relevant: fellow students, colleagues, day-care parents, the football club or yoga group, Instagram followers and TikTok communities. Digitalisation and connectivity are the basis of their new ‘we culture’, the foundation for networking and exchange. At the same time, digital technologies reinforce the Sharing Hedonist’s desire for community and belonging – and this applies equally to both the real and digital worlds.



**A LIFE OF SHARED MOMENTS**

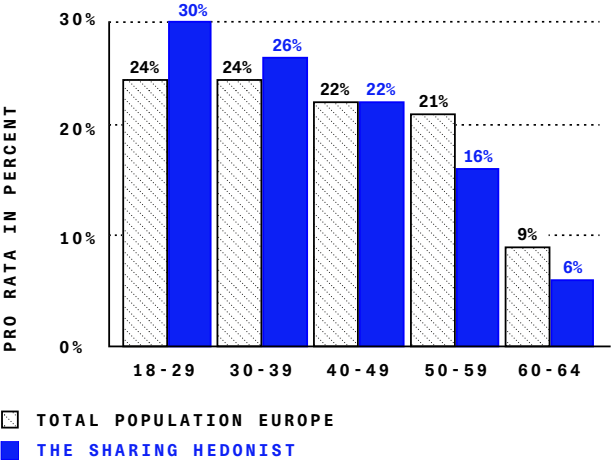
The Sharing Hedonist is constantly online, where they stay in touch with their social reference groups, telling them about experiences, both big and small. WhatsApp and Snapchat are their central communication channels; they post and research content and experiences on Instagram and YouTube. They also find the simple kind of entertainment that interests them on the Internet. More complex cultural topics are not necessarily for them. The central element of their fast-paced lifestyles is the event. The Sharing Hedonist likes to attend concerts, go to clubs and bars with their friends, attend sporting events as a group or relax together over the weekend at the seaside. They also transform everyday activities like cooking or watching TV into events, regularly organising collective Netflix evenings and inviting people to cook together.

INNOVATION AFFINITY COMPARED TO EUROPEAN SOCIETY AS A WHOLE



For Sharing Hedonists, looks are very important, both for celebrating individuality and as a fun factor. They like to experiment and looking good in an individual way is part of their understanding of status. Classical material status symbols such as brand-name fashion or watches are losing their appeal for them; their focus is on immaterial status symbols, such as special events, unusual experiences or unique outfits. As a customer, they can be best reached via word-of-mouth strategies and through their communities. For the Sharing Hedonist, what counts most is the effect they have on their immediate environment. They also evaluate their purchasing decisions according to this.

AGE STRUCTURE COMPARED TO THE EUROPEAN POPULATION AS A WHOLE



RESPONSIBLE HEDONISM

Those having a Sharing Hedonist lifestyle combine youthful hedonism and an adult sense of responsibility. The new value of ‘we’ can be observed in modern forms of co-operations. Urban gardening projects, crowdfunding, couch-surfing communities, clothing swap parties with like-minded people are natural for them. Sharing Hedonists are important drivers of the sharing economy. Not because they need this financially. But out of conviction. They don't see the benefit in owning something. It is enough for them to know who in their environment owns something and how they can obtain it when they need it.

As the hub of a networked society, the Sharing Hedonists have the necessary reach to carry other people along. And even if their ‘I want to have fun!’ at-

titude doesn't always go down well, the combination of the values of community and hedonism attract attention regardless. Social Hedonists are a reliable source of inspiration, and this alone ensures their popularity.

AVERAGE MONTHLY NET INCOME/HOUSEHOLD

SHARING HEDONISTS: € 3,394

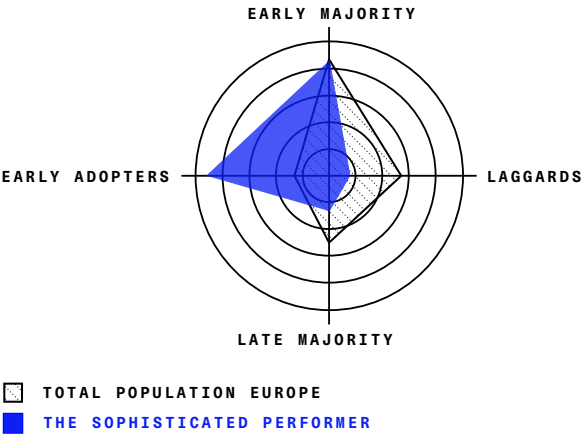
BASIS: € 2,554

3. THE SOPHISTICATED PERFORMER

WORK HARD, PLAY HARD

Performance, luxury, lifestyle - the Sophisticated Performer works hard and, as compensation, rewards themselves well. Their lives follow the performance principle and serve their self-realisation. They embody the most striking version of individualisation. Social recognition and status are important to them. They view success at work as central; for the sake of their career and salary they will sometimes put even their private life aside. The Sophisticated Performer works in a disciplined manner.

INNOVATION AFFINITY COMPARED TO EUROPEAN SOCIETY AS A WHOLE



They believe in themselves and are often only temporarily satisfied with what they have achieved, before setting themselves a new, even more ambitious goal.



This is how they gain recognition in their professional environment - and secure the financial basis for their consumption-oriented lifestyle.

POTENTIAL IN EUROPE  
SOPHISTICATED PERFORMERS

22 MILLION

They often choose to manifest their success through material possessions. Luxury, design and quality are important. When it comes to consumption, the Sophisticated Performer acts situationally and impulsively, allowing themselves to drift through shops, restaurants and online shops, buying whatever they feel like. Indulging and enjoying is what counts; price is secondary. They define their own luxury. They place value on a high-quality whiskey of which there are only a few bottles available worldwide, an individual tailor-made outfit, a watch from a small goldsmith. Their new luxury is limited access, personalisation, credibility and the story behind the product.

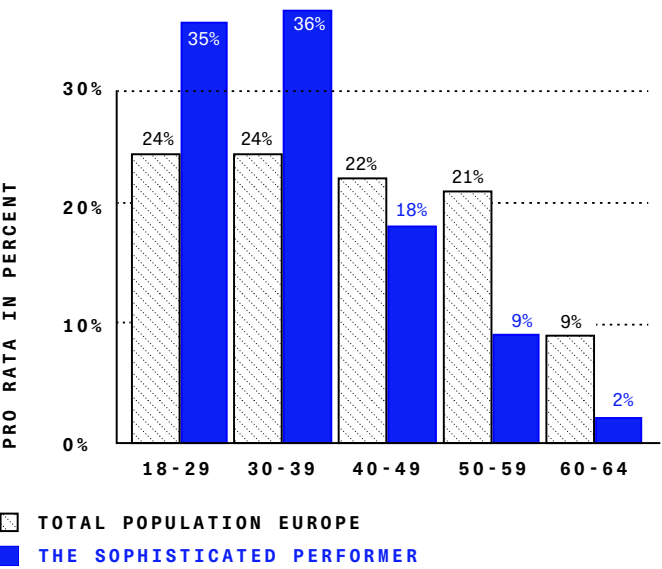
ALWAYS AT THE FOREFRONT

Sophisticated Performers attach great importance to their appearance and invest a lot in fashion, cos-



metics and their fitness. In their limited free time, they take city trips or shopping trips, and undertake longer journeys for their hobbies. Extreme sports arouse their ambition and competitive spirit. They are not necessarily interested in the sport itself, but rather in the thrill and the challenge.

AGE STRUCTURE COMPARED TO THE EUROPEAN POPULATION AS A WHOLE



Whether fashion trends or technology gadgets, Sophisticated Performers are always on the lookout for new products and services that serve their penchant for self-optimisation and prestige. They are always up to date. The need to be perceived as a pioneer by those around them make the Sophisticated Performer very trend-savvy. The desire for innovation makes them the ideal early adopter of premium offers, lifestyle services and personalised products and services.

AVERAGE MONTHLY NET INCOME/HOUSEHOLD

**SOPHISTICATED PERFORMERS: € 5,426**

BASIS: € 2,554

**BECAUSE THEY ARE WORTH IT**

A family of their own is secondary for the Sophisticated Performer for the time being. Those having this lifestyle have a large circle of friends who live the same values as they do. They like to entertain guests or get together with friends and acquaintances to celebrate, have fun and treat themselves. Because they have earned it.

Traditional material status symbols may change over time, but they will continue to have relevance for those who wish to express their success in a striking way and for those who have above-average financial resources. Representatives of this lifestyle are a relevant target group for companies in the premium and luxury segments.

**4. THE MINDFUL CONSUMER**

**MINDFULNESS AS THE HIGHEST PREMISE**

Less work, more free time – that’s not enough for the Mindful Consumer. Their lifestyle is oriented towards wholeness. For them, a healthy body and mind takes centre stage. Everything they do is related to their physical and mental well-being. The lifestyle of the Mindful Consumer reflects two forward-looking social changes: the first is the development of health as the dominant aspect in life, while the second is the growing desire for a working world in which the decisive parameters lie in the well-being of the individual and their respective needs.

Permanent pressure to perform, rigid structures and a highly competitive climate are a no-go for the Mindful Consumer. They require both spatial and temporal flexibility at work – they want to be able to sometimes work from home or reduce their working hours depending on their private situation. In addition, creativity and productivity are not retrievable services for them, and their wish is to protect themselves from self-exploitation and burnout. Because work is a significant determinant in their lives, a job must offer added value beyond monetary rewards: fun, self-development, meaning.

POTENTIAL IN EUROPE  
MINDFUL CONSUMERS

**96 MILLION**

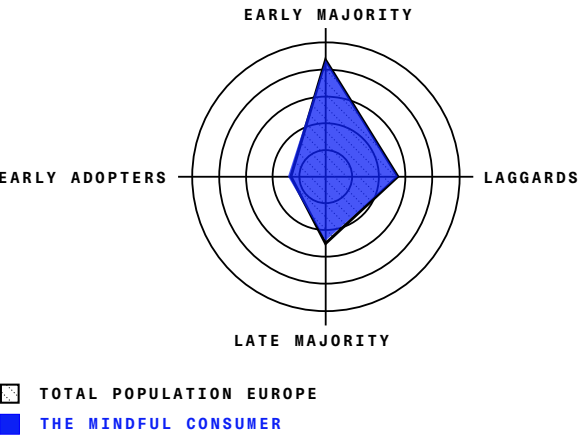
**GOOD IS WHAT IS GOOD FOR THEM**

The Mindful Consumer is the prototype of the developing knowledge and value-oriented economies. Their prevailing principle of self-care means they live an



alternative lifestyle to the performance and optimisation of society – they drive the ‘slow economy’. They confront the ever faster-moving outside world with concepts such as slow food or slow fashion.

INNOVATION AFFINITY COMPARED TO EUROPEAN SOCIETY AS A WHOLE



Financial independence – and thus security in everyday life – is important to the Mindful Consumer, but not a central criterion for (or against) a job. Money is not everything for them, but a means to an end. Their inner balance is based on reflecting on what they really need in life. Good things do not need to be expensive. At the same time, they are not ascetics. On the contrary, they like to indul-



ge themselves. However, it is not necessarily always big investments, but also sometimes the little things that make everyday life more pleasant and relaxed. ‘What is good for me?’ This central criterion of their actions also applies to their consumer behaviour.

AVERAGE MONTHLY NET INCOME/HOUSEHOLD

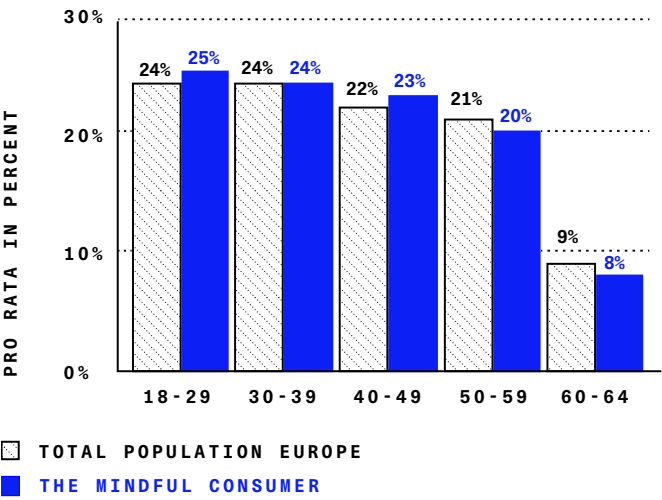
MINDFUL CONSUMERS: € 3,172

BASIS: € 2,554

WELL-BEING IS THE NEW LUXURY

Health and well-being as sales arguments are those that are most convincing to the Mindful Consumer. Wellness trips, meditation and yoga courses are a matter of course when it comes to finding and maintaining their balance. They also practice digital detox – when it comes to restaurants, hotels and means of transport, they prefer to choose the off-line variant. Culture also plays a central role in their well-being, providing them with inspiration and strength in their everyday work. The Mindful Consumer does not define health in medical terms – they are concerned with feeling good and being satisfied. Typically, they make sure they get enough exercise and do sport, but they do not necessarily train in a gym or for a marathon. A balanced diet is important to them.

AGE STRUCTURE COMPARED TO THE EUROPEAN POPULATION AS A WHOLE



The Mindful Consumer does not rely on the opinions of others. They act according to their own standards, deciding for themselves what is good for them in their professional and private lives and

what seems to make sense. As customers, they are critical. Yet, at the same time, they provide companies with an opportunity: their lifestyle plays an increasingly important role because their focus on holistic well-being corresponds to the generally growing need for self-esteem and self-efficacy. People are increasingly looking for options to find inner peace and balance, especially in fast-paced urban centres.

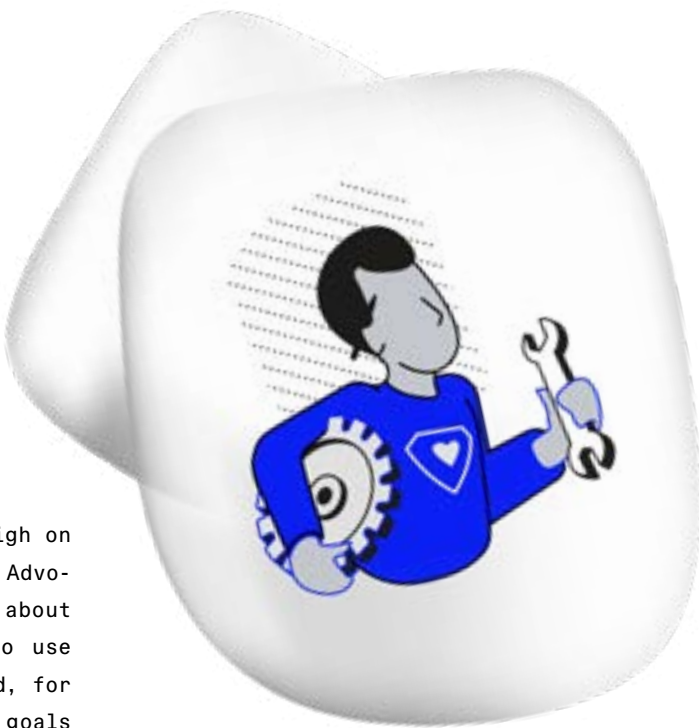
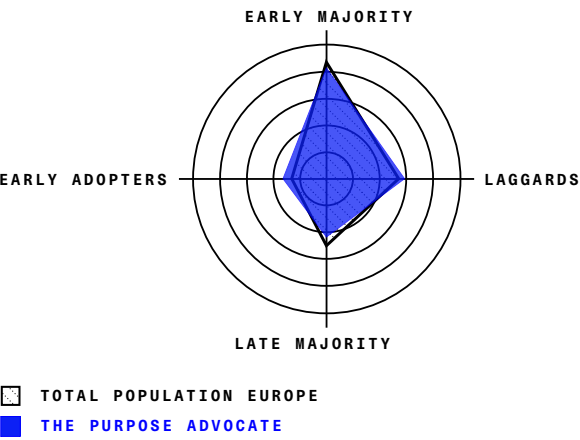
5. THE PURPOSE ADVOCATE

CONSCIOUSLY MAKING THE WORLD A BETTER PLACE

Success at work and earning good money are high on their list of priorities. But for the Purpose Advocate, ambition in their professional life is about much more than ego and salary. They want to use their talents and skills for the greater good, for the environment and society. Their proclaimed goals are to advance ecological, social and political issues and to set new standards in business. Purpose rather than profit.

Purpose Advocates are active framers with a strong will to change. They are already living the change in the world of work today. They need and promote new work cultures, leadership styles and corporate structures. They want to work flexibly and have their own responsibilities; they reject classical hierarchies and static organisations.

INNOVATION AFFINITY COMPARED TO EUROPEAN SOCIETY AS A WHOLE



ALWAYS LOOKING AT THE BIG PICTURE

Those having this mindset have key competencies for a forward-looking economy: they are very well educated, assertive and embody a set of values that subordinates individual interests to the holistic interests of humanity. They are already working in influential positions, and their social influence is correspondingly high. And this will only continue to grow. Their thoughts and actions are rooted in the conviction that the world is whole: ‘I am only well if the environment and my fellow human beings are as well.’

POTENTIAL IN EUROPE  
PURPOSE ADVOCATES

35 MILLION

Purpose Advocates push the concept of ‘new work’ in all its forms: from co-working spaces and remote work to collaboration and self-organisation. At the same time, they are driving the change towards a new understanding of education. For them, education is never complete, but an ongoing process – lifelong learning. Purpose Advocates are passionate media users, they inform themselves through a wide variety of sources. Rather than being experts, they rely on their ability to quickly acquire specialised knowledge as and when needed.

CONSCIOUS CONSUMPTION FOR A BETTER WORLD

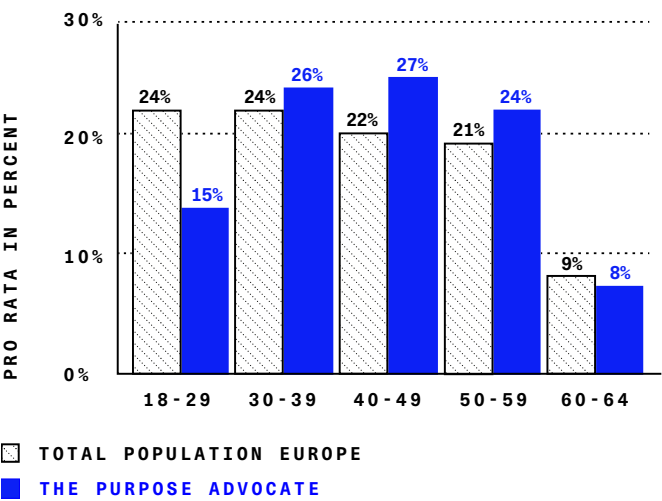
For the Purpose Advocate, standing still is taboo, even in their free time. They exercise regularly, eat healthily and take care of themselves. Culture plays a major role in their lives. They attend concerts and visit museums, galleries, exhibitions and even the theatre more often than average. An essential aspect is that the event is sophisticated. The Purpose Advocate seeks input, information and inspiration in their free time.

AVERAGE MONTHLY NET INCOME/HOUSEHOLD

PURPOSE ADVOCATES: € 3,589

BASIS: € 2,554

AGE STRUCTURE COMPARED TO THE EUROPEAN POPULATION AS A WHOLE



This also applies to their consumer behaviour. The Purpose Advocate drives the so-called purpose economy through their demands. The sustainability of products and services plays a major role for them. Organic, regional and fair trade are their key purchasing criteria. They are interested in transparency relating to the origins of a product and its conditions of production. Where possible, they choose to support local trade. The motto of the Purpose Advocate: you can't change the world through renunciation or boycotts, but you can change it through conscious consumption. They appreciate luxury. However, they do not define luxury by price, but instead by the meaningfulness and social added value created through the product.

6. THE GLOBAL NOMAD

ALWAYS ON THE GO

Always on the move, always online, always in touch. Like no other lifestyle, the Global Nomad embodies the major trends of the 21st century. Globalisation, digitalisation and mobility shape their everyday lives – the Global Nomad lives, works and communicates on the go. Digitalisation and connectivity give them the opportunity to consistently detach themselves from the physical location. They thus have a pioneering role in society: while many people see the challenges and risks of digital transformation, the Global Nomad sees opportunities for professional and private fulfilment and development. Independence, including financial independence, is important to them.

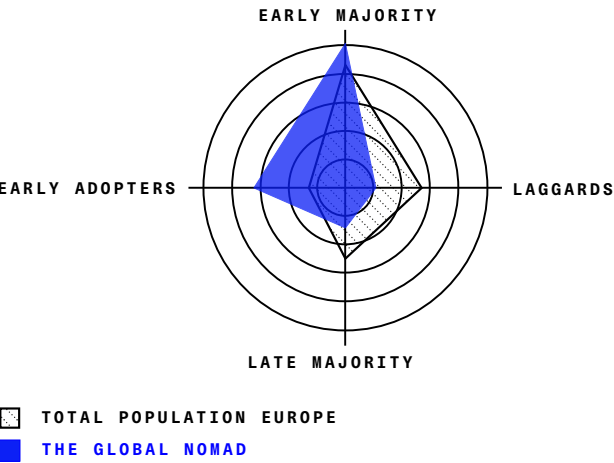
POTENTIAL IN EUROPE  
GLOBAL NOMADS

14 MILLION

They work from anywhere in the world – a job is not bound to fixed working places and times. Many of those having this lifestyle are either freelancers, permanent employees working remotely or frequently change their place of work. With their extreme flexibility and strong personal responsibility, the Global Nomad fits perfectly with the growing trend towards project work. The classical career models and job titles mean little to them; their professional success is defined by the impact and appeal of individual projects. Many Global Nomads are self-taught, having acquired most of their knowledge and skills on their travels.



INNOVATION AFFINITY COMPARED TO EUROPEAN SOCIETY AS A WHOLE



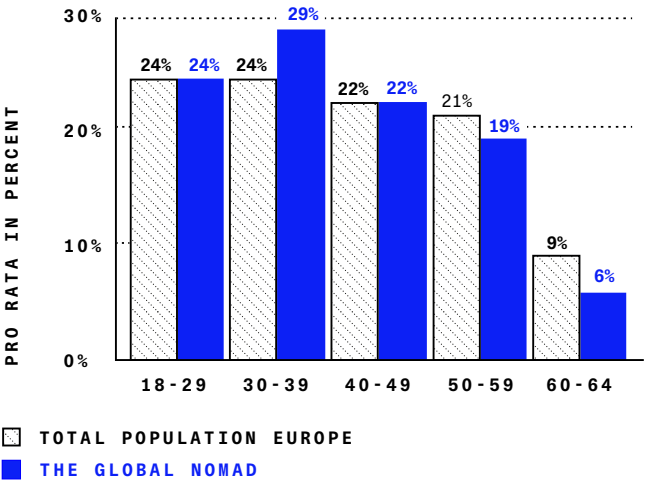
HOME IS A RELATIVE CONCEPT

Working and living, private and public – the conventional categories are no longer relevant to the Global Nomad. They already live in a hyper-connected, global world. Their home is the in-between, the places of encounters: airports, train stations, cultural and sports venues, restaurants and shops. The Global Nomad likes to travel: they want to see the world, meet people, experience many different things. This is how they build a constantly growing international network, which they expand and maintain through social media.

They are not primarily interested in making useful contacts for their job or their travels but are genuinely interested in people's lives and thoughts.

The common denominator in their network is an open and unconventional mindset. The Global Nomad represents fundamentally humanistic and egalitarian values. Origin, skin colour or gender play no role in their world view; they appreciate the mix of cultures and languages of global metropolises. They have only a loose connection to their home country. Home can be anywhere – they put down roots wherever they like. The urge for freedom and independence is also evident in their private life. Many older Global Nomads have stable relationships, are married and have children, but often live with their families only temporarily. Young Global Nomad families move often and travel around the world frequently and for long periods of time, even with small children.

AGE STRUCTURE COMPARED TO THE EUROPEAN POPULATION AS A WHOLE



A HEDONIST ON THE MOVE

As a consumer, the Global Nomad loves everything that supports their flexibility. They drive the so-called service economy: because their lifestyles make them minimalists when it comes to material objects, they are maximalists when it comes to services. They are early adopters of innovative travel apps and mobility services and they are among the first to use new social platforms and invest in new tech gadgets. The Global Nomad sees themselves as a citizen of the world. Global problems such as climate change and environmental protection play a major role for them and they like buying regional and fair-trade products. However, these values are not decisive purchasing criteria. Global Nomads are far too hedonistic for that. They want to be able to afford mobility and spontaneity and are happy to

spend their money on expensive brands and luxury items – as long as these fit in perfectly with their always-on-the-go lifestyle.

AVERAGE MONTHLY NET INCOME/HOUSEHOLD

GLOBAL NOMADS: € 4,042

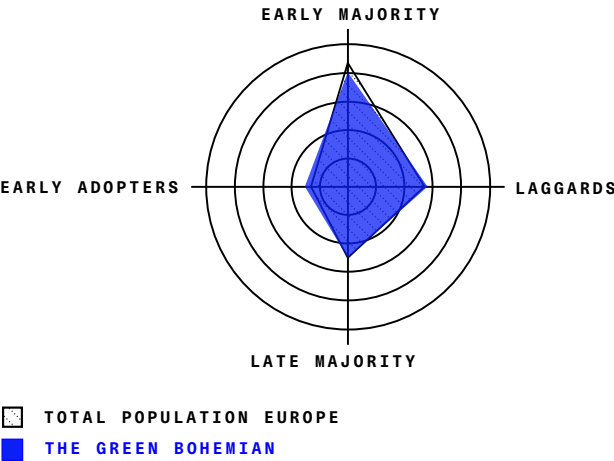
BASIS: € 2,554

7. THE GREEN BOHEMIAN

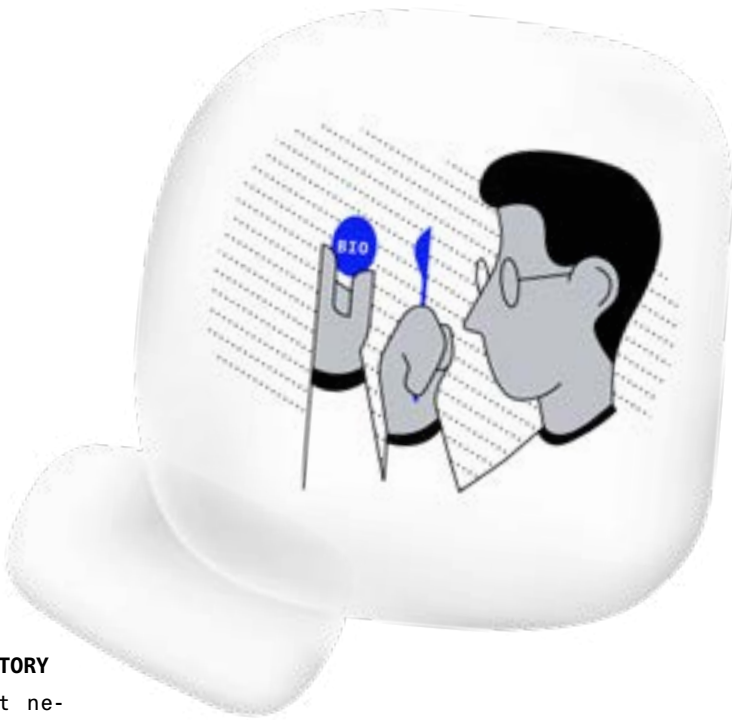
SUSTAINABILITY AND ENJOYMENT ARE NOT CONTRADICTORY

For the Green Bohemian, sustainability is not necessarily synonymous with renunciation. Climate change, environmental protection, global pandemics – the big problems of the 21st century play a dominant role for them. They are committed to ecological goals in all areas of life and are driven by the desire to save the world, at least to some extent. While other target groups try to do without. The Green Bohemian does not. Their eco-social actions are ethically correct and fun for them – they are simultaneously sustainable and hedonistic.

INNOVATION AFFINITY COMPARED TO EUROPEAN SOCIETY AS A WHOLE



The Green Bohemian is aware that it is, above all, their consumption decisions that they can use to influence the future of the planet. They do not reject the classical status symbols, but buy from brands and manufacturers that combine luxury with sustainability and guarantee environmental and ethical standards. The Green Bohemian also finds upcycled



objects and products designed within the so-called circular economy approach attractive. They are supporters of the zero-waste movement, which views waste and discarded items as raw materials.

SHARE, SWAP, EAT DIFFERENTLY

The Green Bohemian lives by the motto 'less is more'. Possessions are relative and the Green Bohemian relies on a sharing culture. When they need a car, they use a car-sharing platform, and food that has been bought in excessive quantities is offered onwards through food-swapping communities.

POTENTIAL IN EUROPE GREEN BOHEMIANS

35 MILLION

Food is a central topic for them. Here, too, they want to combine enjoyment with ecological and social responsibility. Green Bohemians include vegetarians, vegans and flexitarians – and recently also so-called 'real omnivores'. Although they eat mainly plant-based foods, they will also eat algae and insects. They include all parts of an animal when eating meat and are the first buyers of products such as in-vitro meat and fish from cell cultures. Green Bohemians are always looking for new options for a balanced, sustainable diet that are not solely based on the exclusion principle.



TRAVEL YES, BUT CONSCIOUSLY

With their openness and willingness to experiment with sustainability, those with this lifestyle are sensors for trends that later become established in society as a whole due to the increasing relevance of neo-ecology. The Green Bohemian’s sustainability-hedonistic consumption pattern leads to new products and services; through their lifestyle, environmental awareness and sustainability develop into broad social movements.

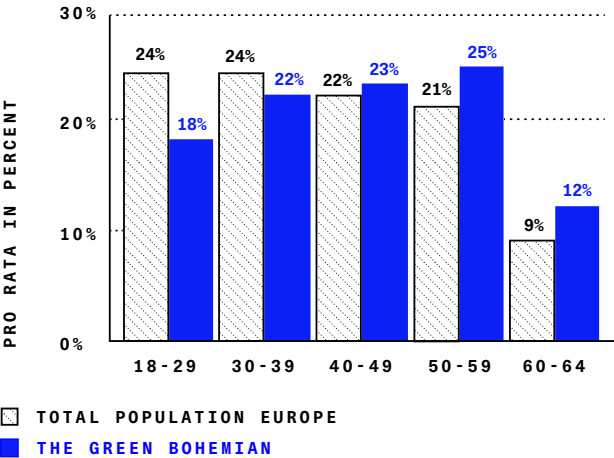
AVERAGE MONTHLY NET INCOME/HOUSEHOLD

GREEN BOHEMIANS: € 3,114

BASIS: € 2,554

While young consumers demonstrated their will to change at the Fridays for Future demonstrations, and while older people showed solidarity with the movement, one area remains almost completely excluded from the willingness to change: travel. On the one hand, the Green Bohemian consciously refrains from individual air travel, while on the other hand, travel has a central meaning for them, especially the younger generations. Discovering foreign cultures, getting to know people in other countries – these desires are very high on the list of Green Bohemians.

AGE STRUCTURE COMPARED TO THE EUROPEAN POPULATION AS A WHOLE



REGIONAL, SELF-SUFFICIENT, SOCIALLY RESPONSIBLE

In all other areas, however, they show a consumer behaviour in which the local is becoming increasingly important. Green Bohemians are committed to

the sustainable development of their places of living, which are mainly the urban centres. They prefer to buy from local retailers and directly from producers. Through urban farming initiatives and community gardens they try to bring a piece of land into the city and fulfil their desire for regionality, local self-sufficiency and a stronger social togetherness.

With the coronavirus pandemic, the Green Bohemian finally received confirmation that there can be no more ‘business as usual’ when dealing with our planet Earth, and that things can be done differently. The economy and society are embarking on a change of values. Instead of unlimited growth and profit, the focus is now on sustainability, post-growth and the common good. Digital technologies play a decisive role, helping to cope with global challenges. The Green Bohemian sees ecological and social added value as central consumption criteria, and consumption as a lever for achieving change. They are living today the mindset of tomorrow.

8. THE MODERN CONSERVATIVE

STRUCTURE, STATUS AND SECURITY

For them, virtues such as diligence, honesty, loyalty and a sense of duty count. The Modern Conservative is a preserver of traditional values. At work, they find orientation in hierarchical structures and conventional career models. Change and progress are desirable, provided that the new developments bring a personal advantage.

The Modern Conservative pursues conservative goals: their own property provides stability. Preferably in a quiet area or even in the countryside. A permanent position with an above-average salary is a matter of course for them. Their job title is important to them and so is the company car. Yet, the Modern Conservative is not a workaholic. Rather, they value time with their family.

POTENTIAL IN EUROPE  
MODERN CONSERVATIVES

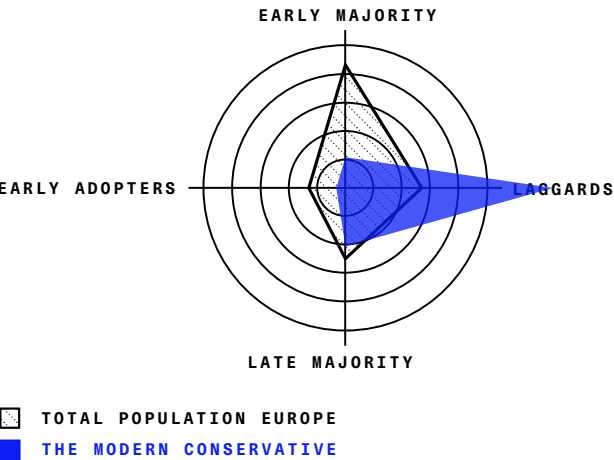
120 MILLION

Because their focus is not always on themselves and their needs, for the Modern Conservative it is always about their core social group: their family and closest circle of friends. This is where they seek and find security and commitment, the fixed points in their lives. They offer their children the



best possible education, they like to dress them in well-known brands and encourage them with sports, music lessons, language courses or student exchange programmes.

INNOVATION AFFINITY COMPARED TO EUROPEAN SOCIETY AS A WHOLE

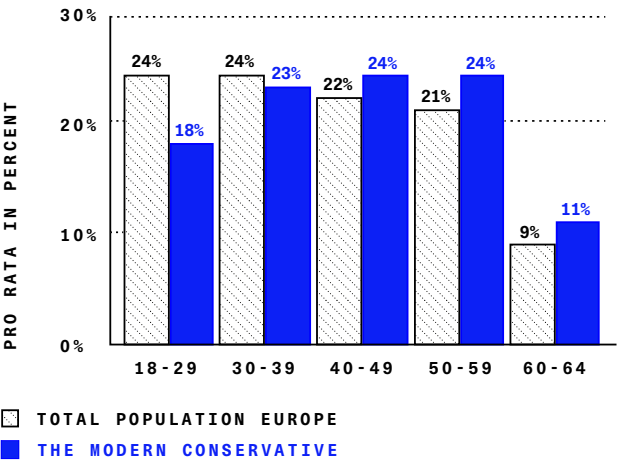


INVESTING IN ESTABLISHED SUCCESS CONCEPTS

For them, their home is an oasis of cosiness, relaxation and warmth. It is a place of security where they can retreat from an increasingly complex and fast-paced world.

They are initially cautious about digital technologies, waiting for others to do the testing. For the Modern Conservative, data protection and security take precedence over usefulness and convenience. Their consumer tastes are based on established concepts – they appreciate products with high quality and prestige, and the price is often secondary. The Modern Conservative is a fan of traditional brands. They are less impressed by the latest trends and fashions and already know what they want. They are enthusiastic about timeless classics and eagerly await their new editions.

AGE STRUCTURE COMPARED TO THE EUROPEAN POPULATION AS A WHOLE



CRITICAL, BUT WITH PURCHASING POWER

The Modern Conservative avoids anything that appears to be strange or uncertain. Before buying something expensive, they want to try it out. Before trying something, they need to have done extensive research or obtained advice. Often, however, they stick with the tried and tested – although preferably in the latest version. It is not easy to convince them to try something new, but the cumulative purchasing power of Modern Conservatives makes it worth the effort.

AVERAGE MONTHLY NET INCOME/HOUSEHOLD

MODERN CONSERVATIVES: € 3,172

BASIS: € 2,554

In terms of society as a whole, the Modern Conservative does not drive any major changes. At least not at first sight. However, ever since COVID forced

lockdowns and convinced more people of the benefits of working from home, retreating into the private sphere is no longer seen as escaping the world. But as building a new quality of familiarity and commitment – behaviour that is evident in rural regions already but is now also lived in cities.

OUTLOOK

Based on various target group and trend studies, the Evolving Targets provide a fictitious, more human-centred insight into potentially growing target groups, each with their own characteristic attitudes, behaviours and expectations of companies and brands.

Some of them are similar to a certain degree. Others are almost at odds with each other. Ultimately, all of them are travellers that need to be catered to in the future.

This paper is primarily intended to trigger a change in perspective and inspire rethinking. Because the demands on companies and brands are becoming increasingly more diverse, reaching tomorrow's customers requires new approaches and new tools for innovation. This document is meant to be one of them.

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