



UM

# WAVE X REMIX CULTURE

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# 2019

GLOBAL STUDY

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UNLOCKING THE  
POWER OF  
CULTURE & TRENDS



$$\begin{array}{r} 53 \\ -21 \\ \hline 32 \end{array}$$



# BETTER

SCIENCE

ART

OUTCOMES





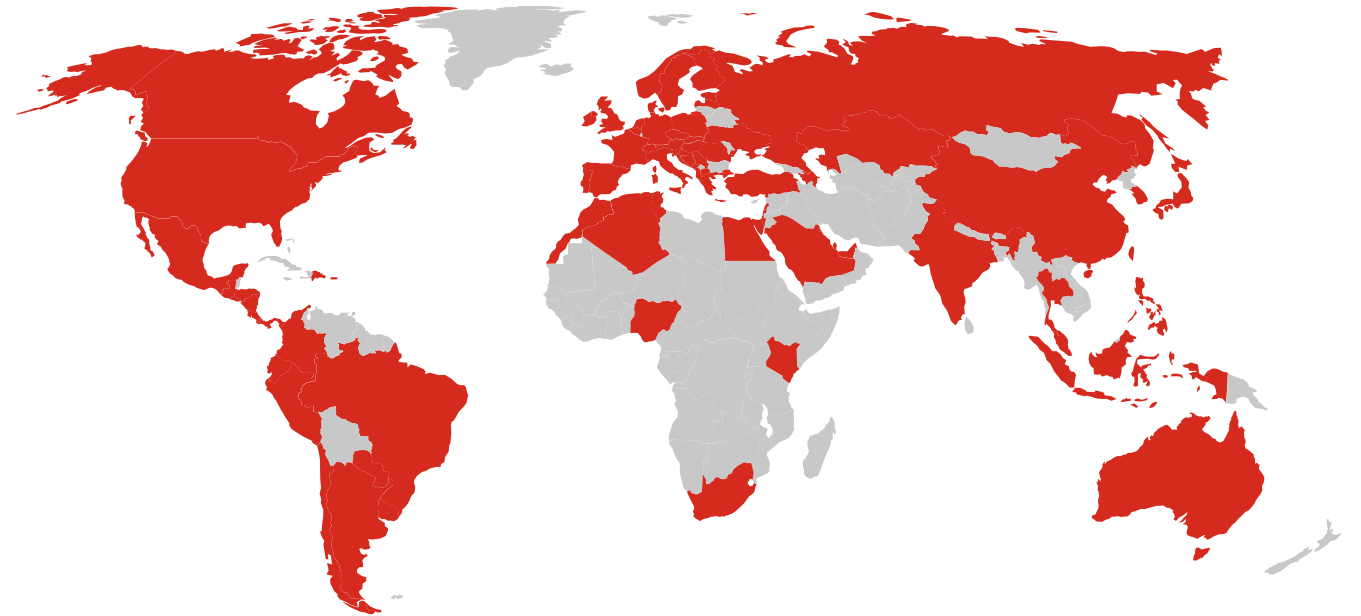
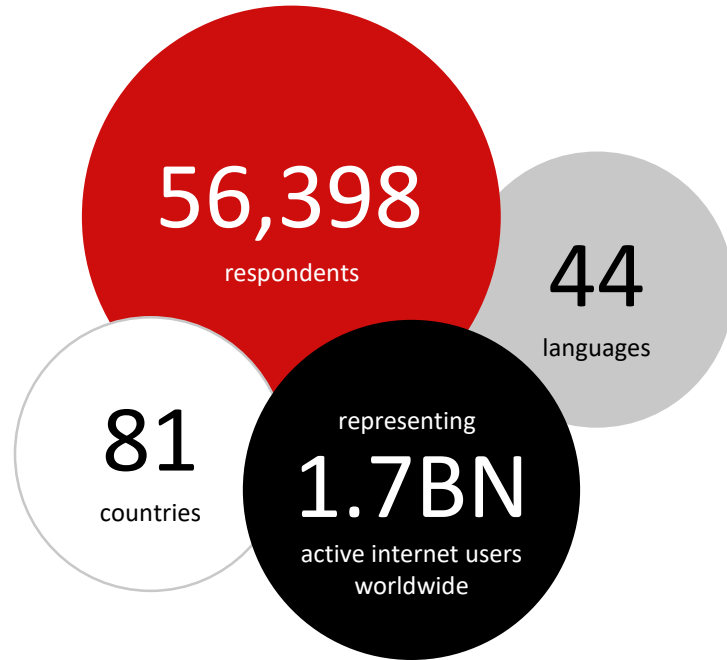
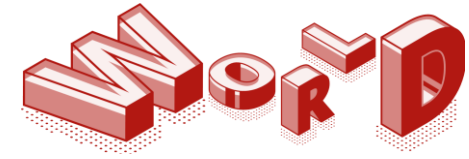
# THE 10TH EDITION OF UM'S WAVE

- An online survey of 56,398 active internet users in 81 countries
- All surveys are self-completed. The data collected is purely quantitative
- Active Internet Users are those who use the internet every day or every other day
- They drive adoption of platforms and tools and they will determine which tools and platforms become dominant





# WE SPOKE TO PEOPLE ALL OVER THE



Albania\*  
Algeria  
Argentina  
Australia  
Austria  
Azerbaijan  
Bahrain  
Belgium  
Bosnia & Herzegovina  
Brazil  
Bulgaria  
Canada

Chile  
China  
Colombia  
Costa Rica  
Croatia  
Czechia  
Denmark  
Dominican Republic  
Ecuador  
Egypt  
El Salvador  
Estonia

Finland  
France  
Germany  
Greece  
Guatemala  
Honduras  
Hong Kong  
Hungary  
India  
Indonesia  
Ireland (ROI)  
Israel

Italy  
Japan  
Kazakhstan\*  
Kenya  
Kuwait  
Latvia  
Lebanon  
Macedonia  
Malaysia  
Mexico  
Montenegro\*  
Morocco

Netherlands  
Nicaragua  
Nigeria  
Norway  
Panama  
Paraguay  
Peru  
Philippines  
Poland  
Portugal  
Puerto Rico  
Qatar

Romania  
Russia  
Saudi Arabia  
Serbia  
Singapore  
Slovakia  
Slovenia\*  
S. Africa  
S. Korea  
Spain  
Sweden  
Switzerland

Taiwan  
Thailand  
Tunisia  
Turkey  
Ukraine  
UAE  
UK  
USA  
Uruguay



# WAVE X: TEN YEARS OF

# LEARNING



ROLE OF PLATFORMS



SOCIAL IMPACT



MOMENTS



CONTENT

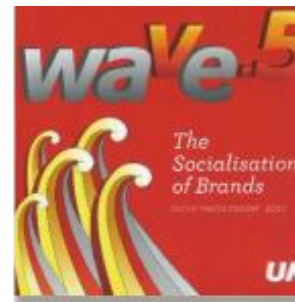
## WAVE X **REMIX** CULTURE



INFLUENCERS



MOTIVES



BRAND RELATIONSHIPS



CONSUMER VALUE  
EXCHANGE



SOCIAL NEEDS



UM

**Brexit:  
is it  
worth it?**

**CHAMPIONS  
DU MONDE  
DES TAXES**

**ARE WE IN A CULTURAL CRISIS?**

WAVE X REMIX CULTURE





# WE INVESTIGATED THE BIG SHIFTS IN CULTURE



IS **TRUST** IN DECLINE?

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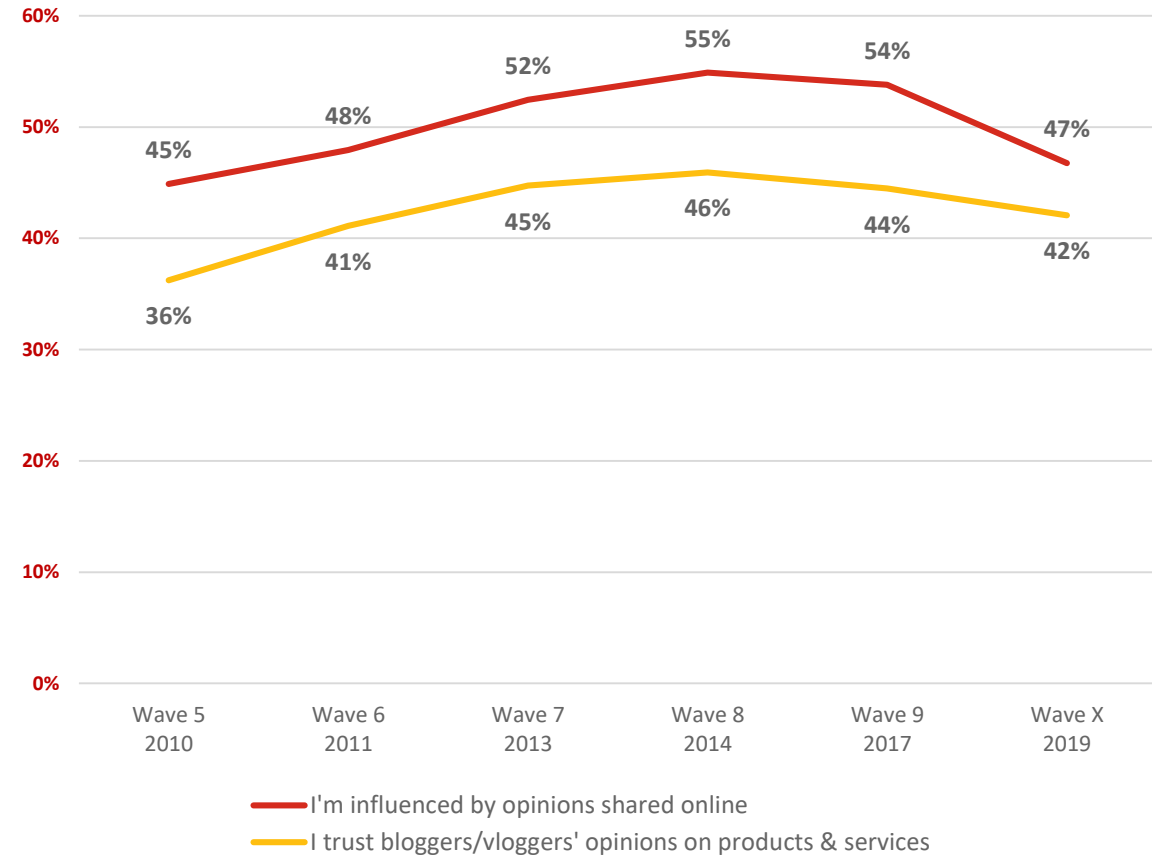
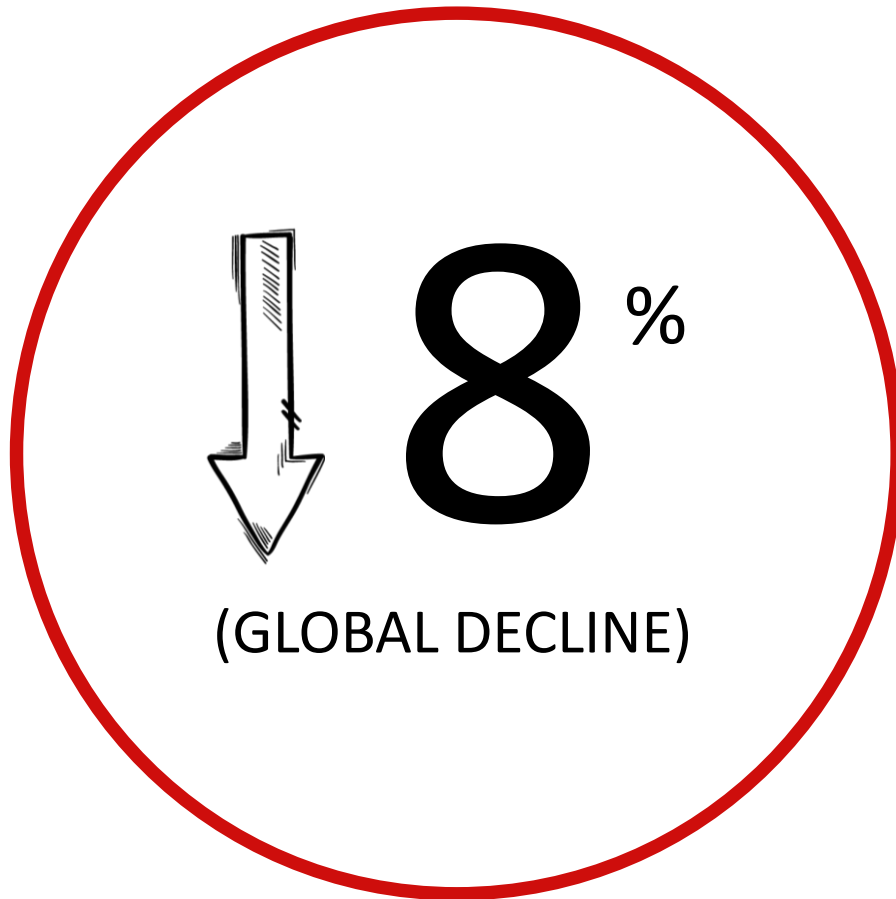
HOW ARE EVENTS IMPACTING  
**IDENTITY?**

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HOW HAS **PROXIMITY**  
(SPACE & TIME) AFFECTED THE SPREAD OF  
CULTURE?



# OVER THE LAST 5 YEARS, WE'VE LOST



Source: Wave 5 (2010) – Wave X (2019). Base: All Markets.

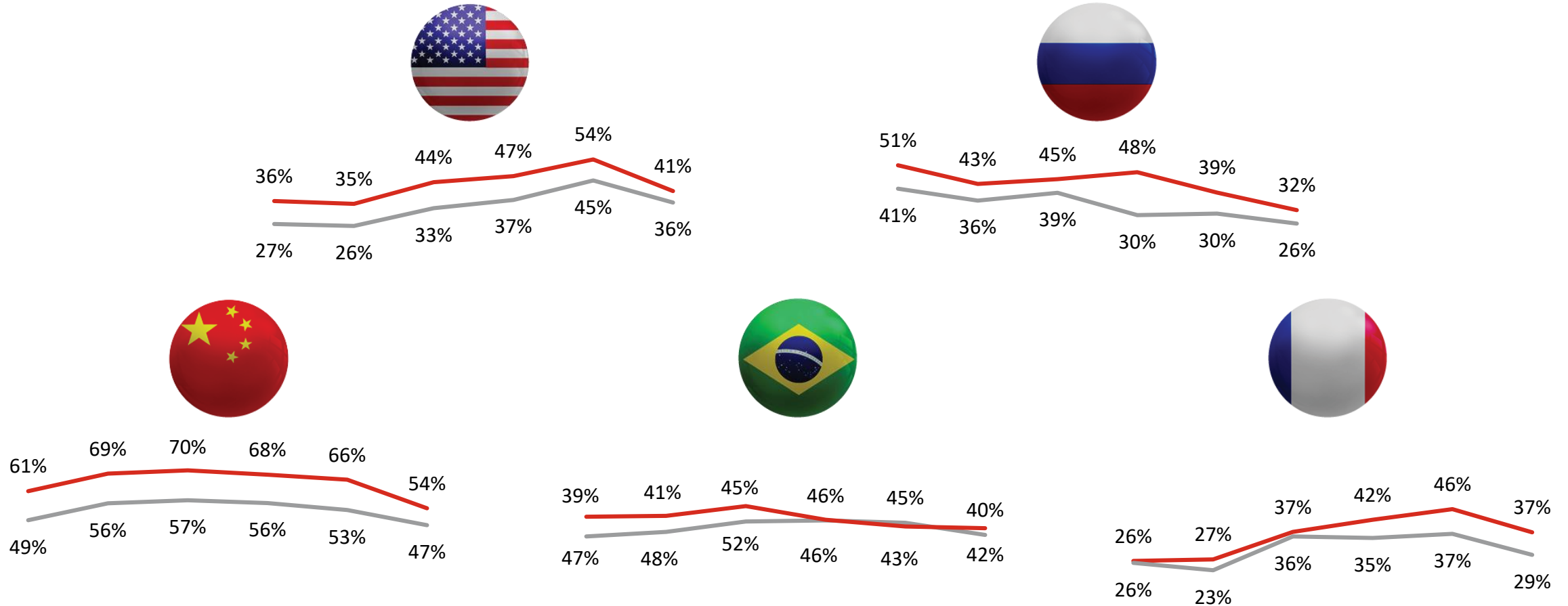
Q39 Below are a list of statements, please can you answer reflecting your opinion [Any Agree]

Agreement with "I'm influenced by opinions shared online" declined 8% from Wave 8 to Wave X





# AND THIS EROSION OF TRUST IS CONSISTENT IN EVERY PART OF THE WORLD



— I'm influenced by opinions shared online

— I trust bloggers/vloggers' opinions on products & services

Source: Wave 5 (2010) – Wave X (2019). Base: All markets. Q39  
Below are a list of statements, please can you answer reflecting your opinion [Any Agree]



# WHILE TRUST IS DOWN, THE DESIRE TO BE CONNECTED HAS INCREASED



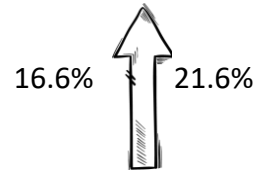
Source: Wave 5 – X (2010-2019) All Markets.  
Q46. Which of these online applications does a good job when you want to “Feel like I belong” [Any channel]



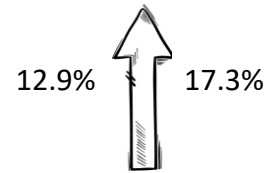
# AND THIS NEED TO BELONG IS A GROWING GLOBAL FEELING



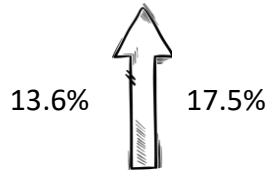
US



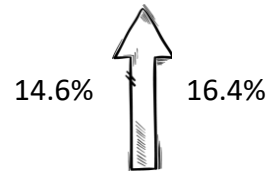
UK



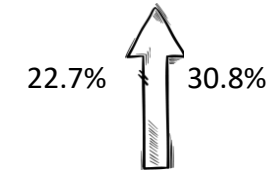
GERMANY



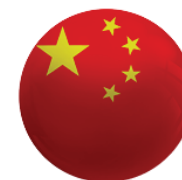
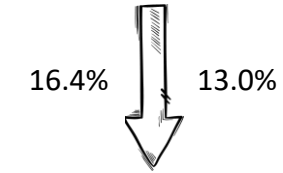
AUSTRALIA



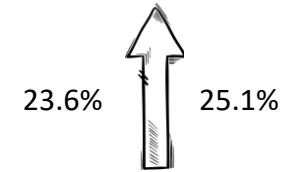
BRAZIL



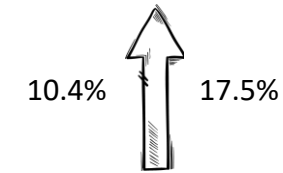
FRANCE



CHINA



JAPAN



Source: Wave 5 – X (2010-2019) All Markets.

Q46. Which of these online applications does a good job when you want to “Feel like I belong” [Any channel]





# WHEN STRIVING TO BELONG WE LOOK FOR SIMILARITIES

## SOCIAL IDENTITY THEORY

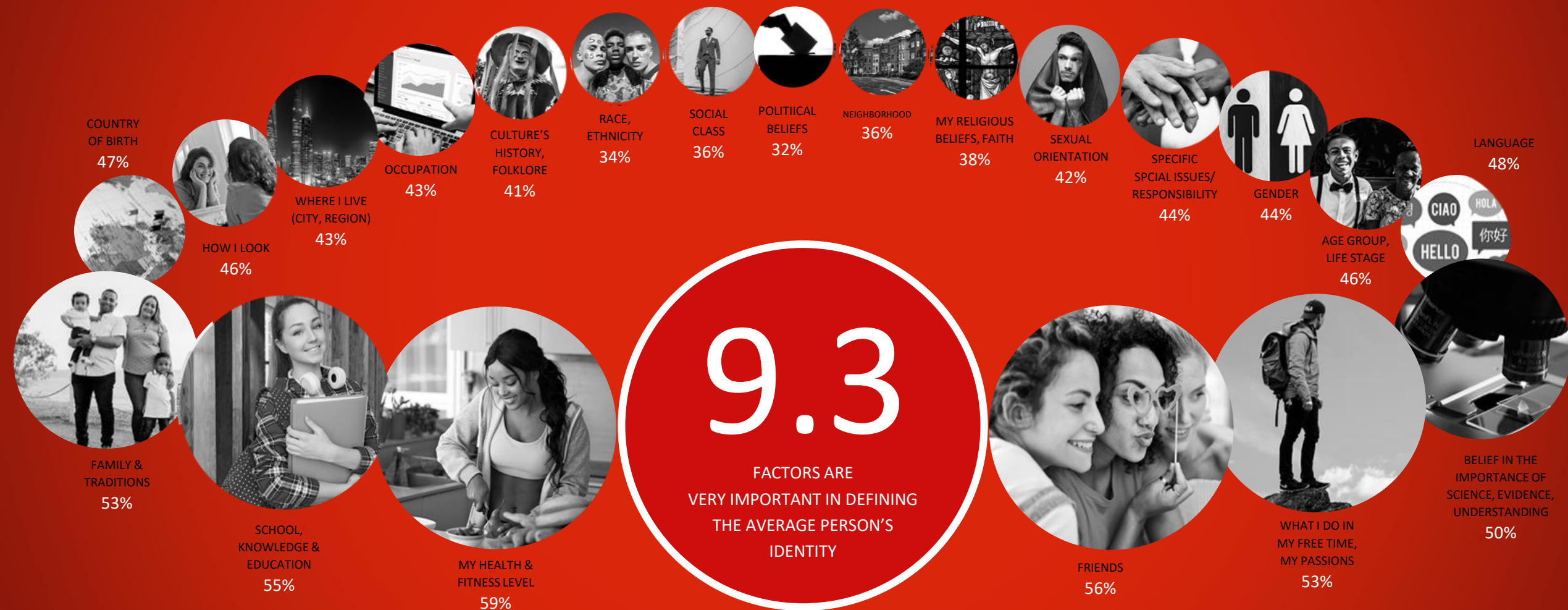
GROUP  
MEMBERSHIP  
DRIVES  
ACTION

GROUP  
MEMBERSHIPS  
ARE NOT  
FIXED

SIMILARITY  
IS A STATE OF  
MIND



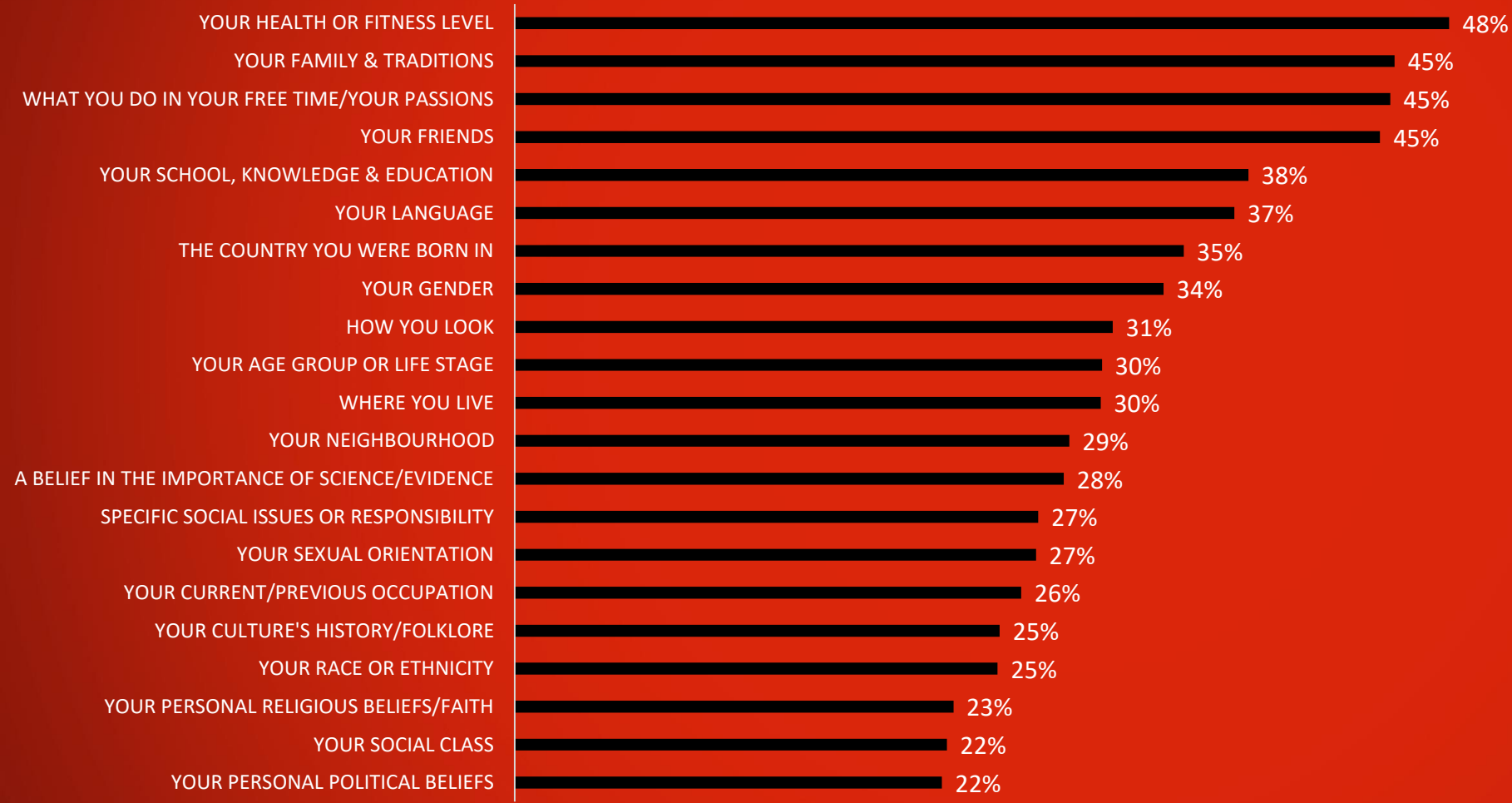
# AS WE LOOK FOR SIMILARITIES WE NEED TO UNLOCK THE FACTORS THAT SHAPE OUR IDENTITY



Source: Wave X – Remix Culture. Base: All Markets.  
C1. Please tell us, how important each one of the following is to your own sense of identity and in defining who you are today.  
Please use a scale of 1-10, where 1 is “not at all important” and 10 is “extremely important”. [8-10]



# AS WE LOOK FOR SIMILARITIES WE NEED TO UNLOCK THE FACTORS THAT SHAPE OUR IDENTITY



6,7

FACTORS ARE  
VERY IMPORTANT IN DEFINING  
THE AVERAGE PERSON'S  
IDENTITY

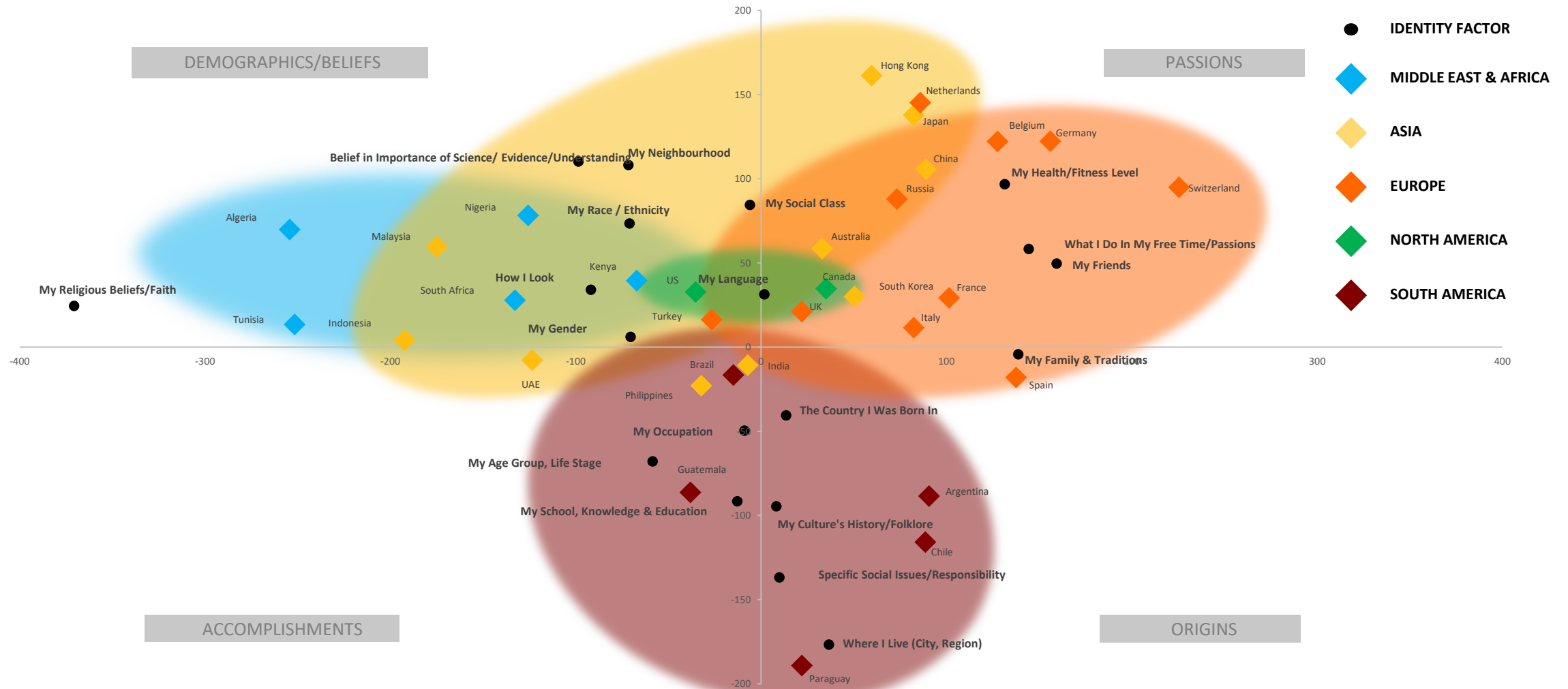
Source: Wave X - Remix Culture. Base: Netherlands  
C1. Please tell us, how important each one of the following is to your own sense of identity and in defining who you are today.  
Please use a scale of 1-10, where 1 is "not at all important" and 10 is "extremely important". [8-10]





# CLUSTERS SHOW HOW REGIONS & COUNTRIES MOST PROMINENTLY ALIGN AND SELF IDENTIFY

## CORRESPONDENCE MAP BY COUNTRY



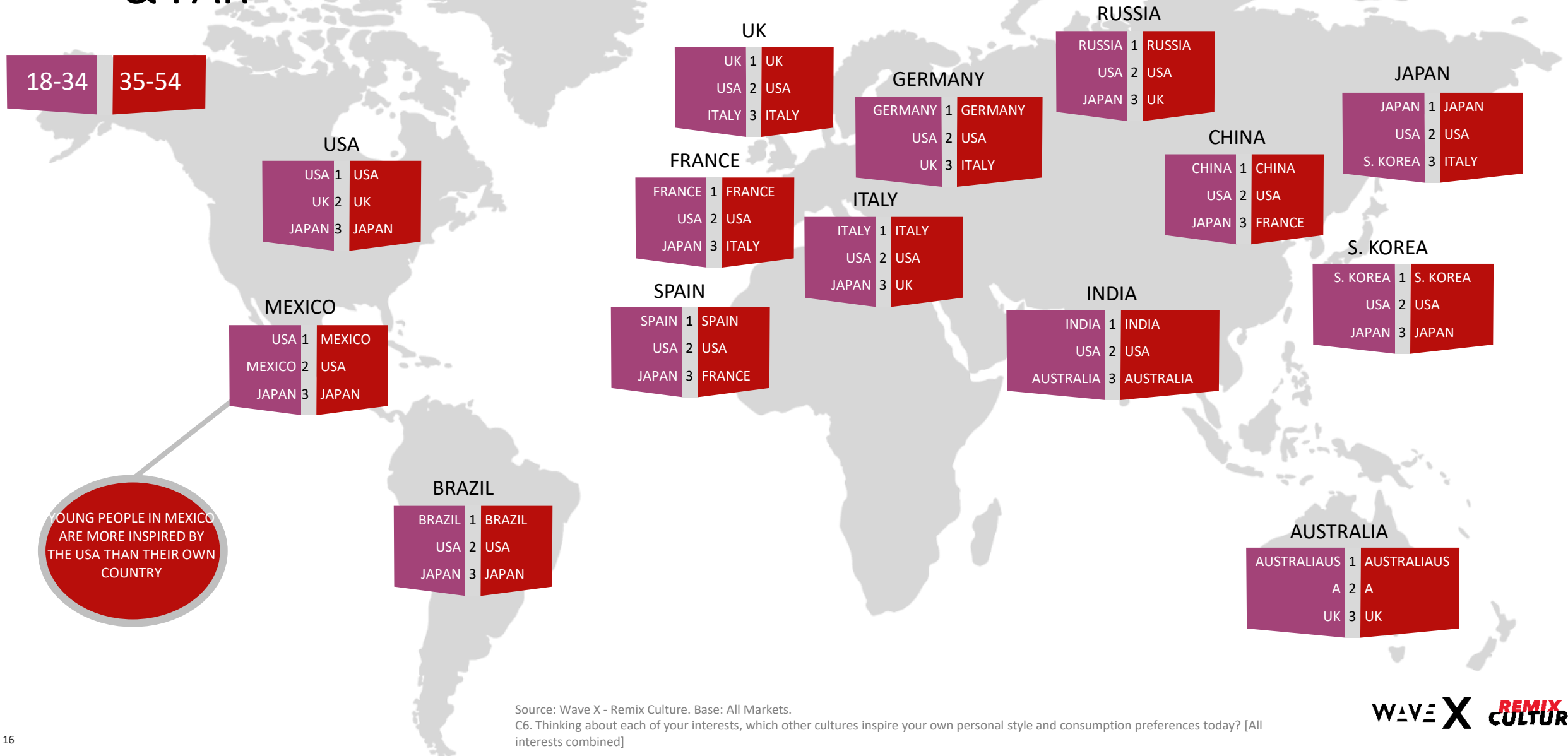
Source: Wave X - Remix Culture. Base: All Markets.  
C1. People define their individual identity in different ways. Please tell us, how important each one of the following is to your own sense of identity and in defining who you are today (extremely important). [Excluding Sexual Orientation and Political Beliefs as not asked in all markets]



# CULTURAL INFLUENCE IS DRIVEN BY PROXIMITY ...BOTH NEAR & FAR



In-depth data is shown  
for your market on the  
next slide.



Source: Wave X - Remix Culture. Base: All Markets.

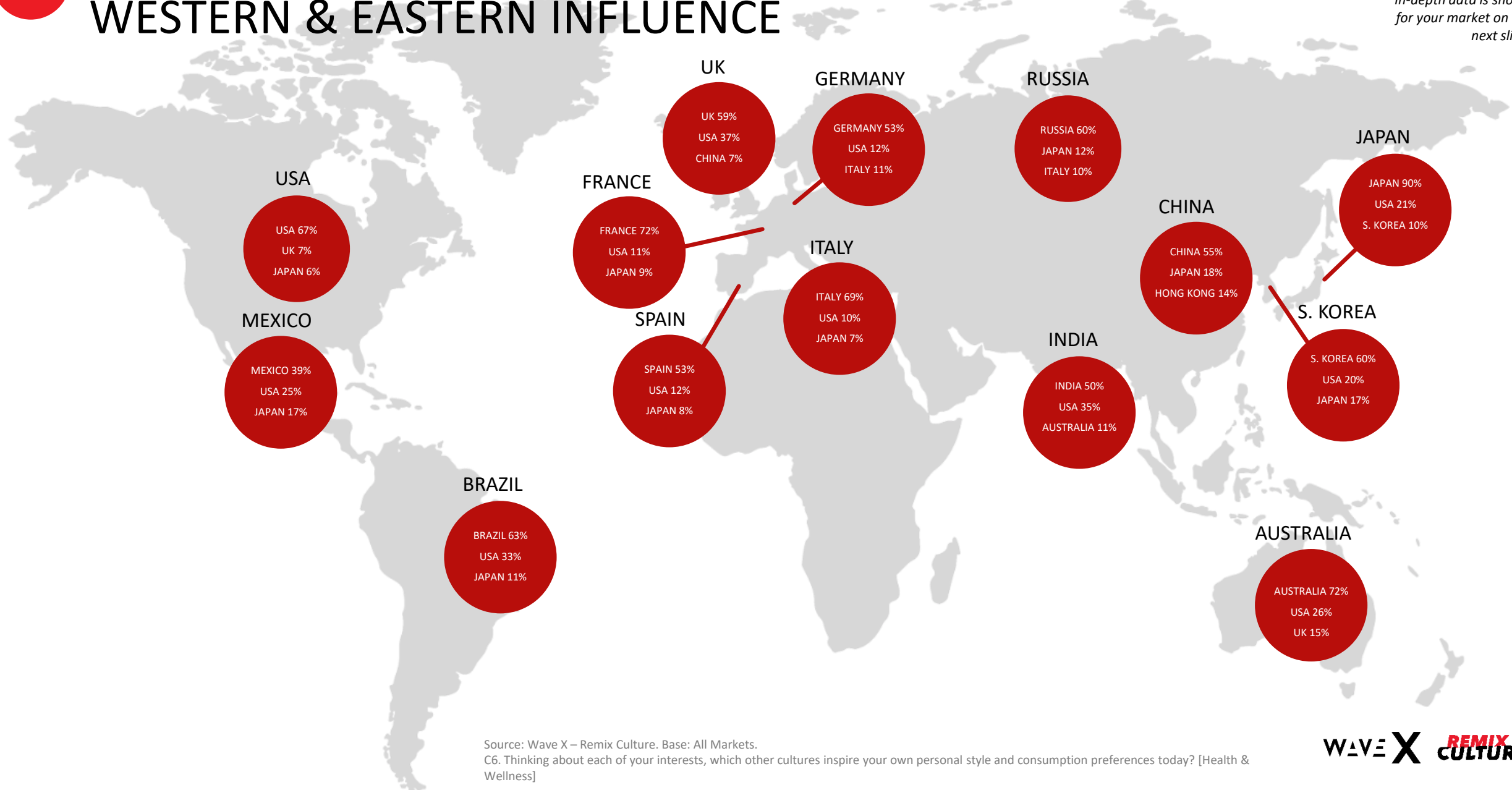
C6. Thinking about each of your interests, which other cultures inspire your own personal style and consumption preferences today? [All interests combined]



# IN HEALTH & WELLNESS, US AND JAPAN LEAD – BALANCING WESTERN & EASTERN INFLUENCE



*In-depth data is shown  
for your market on the  
next slide.*



Source: Wave X – Remix Culture. Base: All Markets.

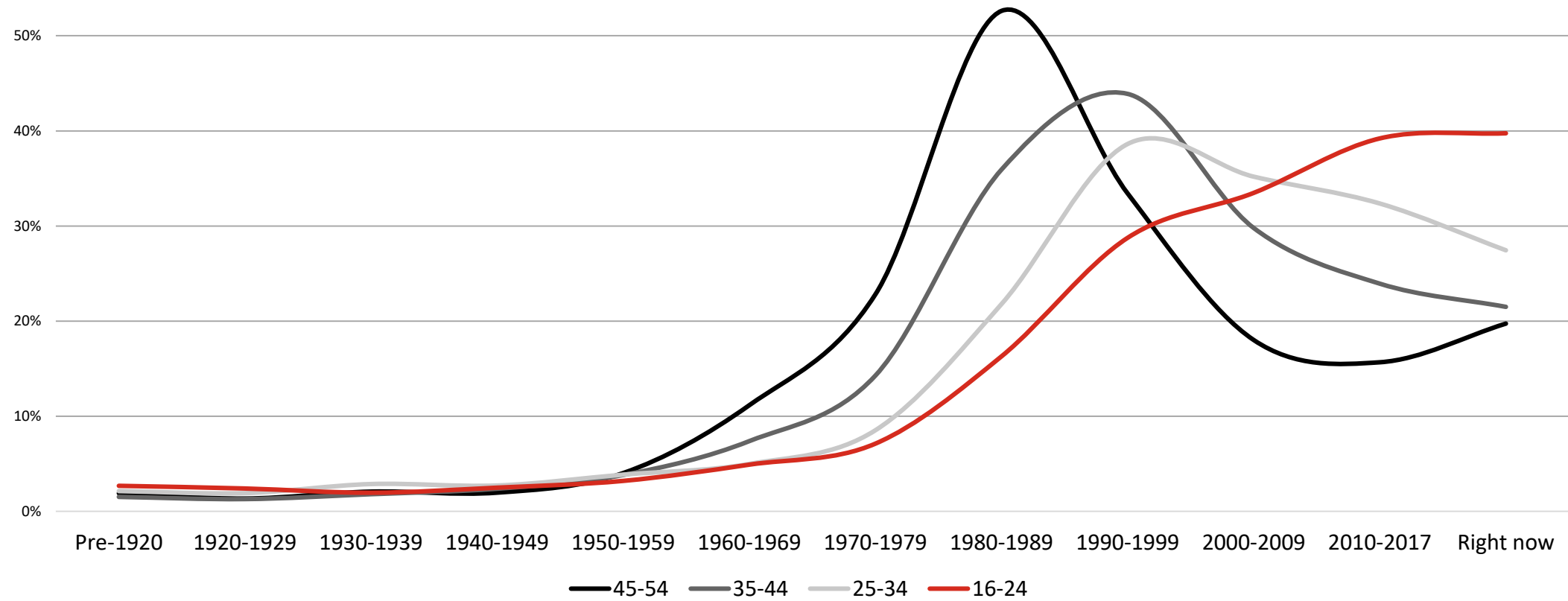
C6. Thinking about each of your interests, which other cultures inspire your own personal style and consumption preferences today? [Health & Wellness]





# 16-34 YR-OLDS ARE TIME TRAVELLERS AND DRAW INSPIRATION FROM MANY DECADES

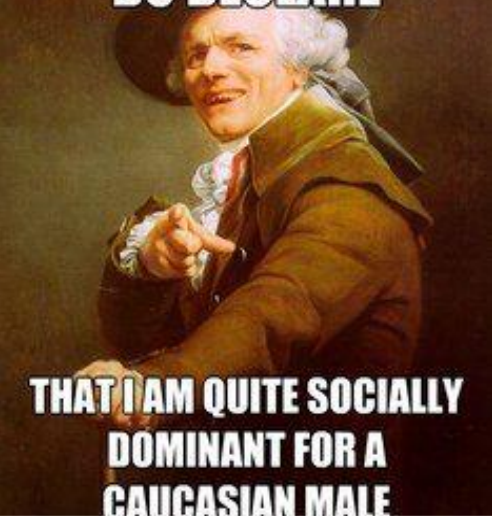
DECADES THAT INFLUENCE AUDIENCES, BY AGE



Source: Wave X – Remix Culture. Base: All Markets.  
C8. Switching gears to pop culture and thinking about everything from music and movies, to clothing and cars, which of the following decades would you say influences your attitudes, beliefs and behaviours (e.g. your music, fashion, etc.) today?

UM

AND ALL THE FEMALES  
DO DECLARE



THAT I AM QUITE SOCIALLY  
DOMINANT FOR A  
CAUCASIAN MALE



A NETFLIX ORIGINAL SERIES

CHILLING ADVENTURES OF  
**SABRINA**

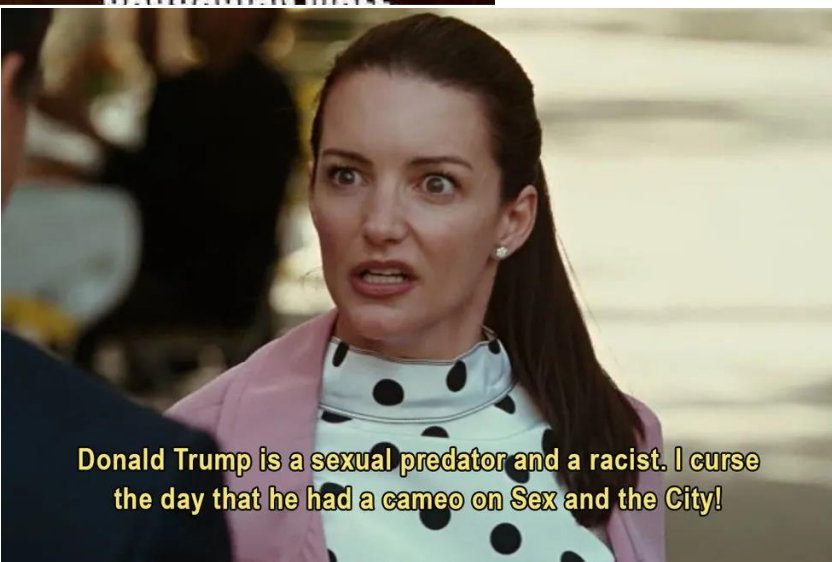
OCT 26 | NETFLIX



ABC  
JK  
RS  
**STRANGER  
THINGS**

A NETFLIX ORIGINAL SERIES

MUSIC BY KYLE DIXON & MICHAEL STEIN • VOLUME ONE

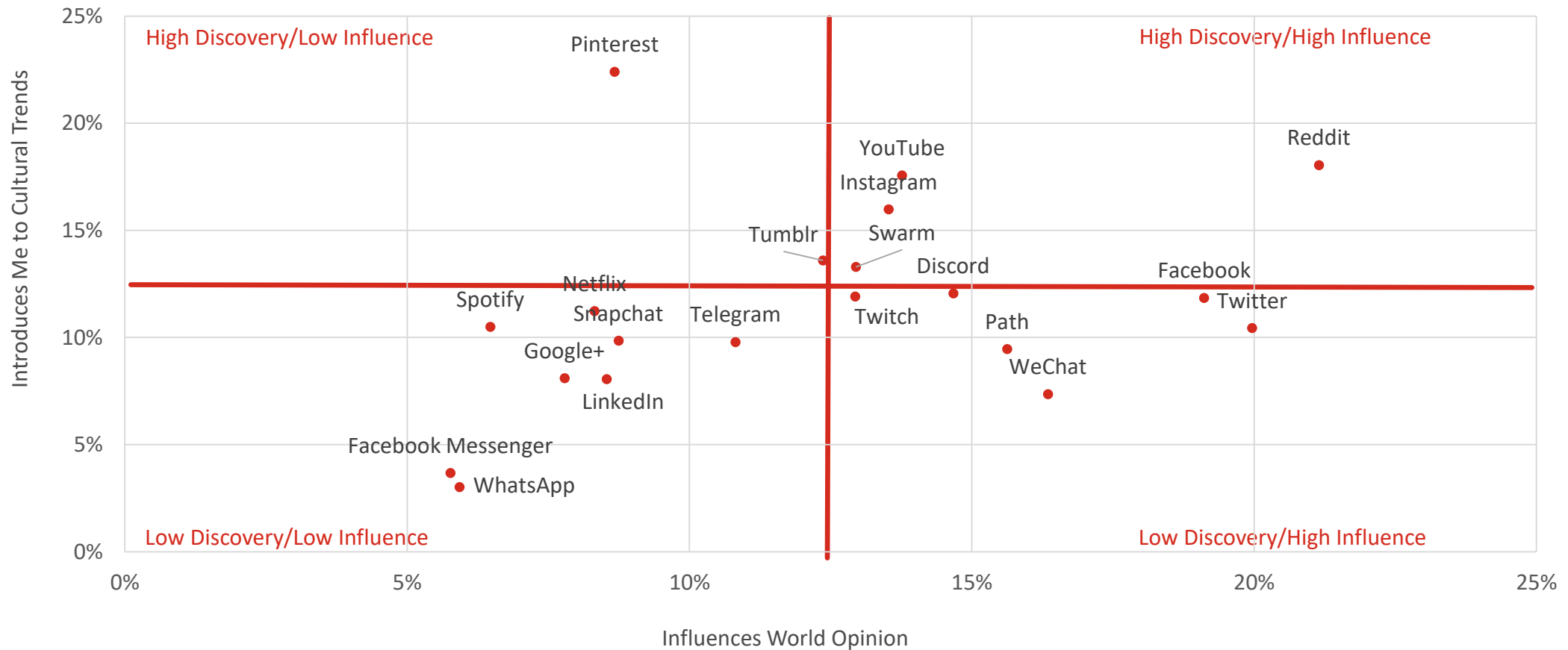


Donald Trump is a sexual predator and a racist. I curse  
the day that he had a cameo on Sex and the City!



WAVE X REMIX  
CULTURE

# Q24. WHICH OF THE FOLLOWING STATEMENTS DO YOU THINK DESCRIBE EACH OF THE PLATFORMS BELOW?







# OUR PLAYBOOK TO NAVIGATE

TRENDS



**CULTURE  
WAVES**



CULTURAL MAPPING

GLOBAL STUDY  
*Remix Culture/Wave X*

REMIX BRAND SURVEYS  
*Custom study*

MOMENTS TOOL  
*Remix Culture Pillars*

GLOBAL TREND  
NETWORK  
*Cultural  
REMixologist*



**REMIX  
CULTURE**

Coke

US Brand/Category Customization  
*J&J/Beauty | CVS/Health  
Amex/Financial | Quicken/Mortgage*

WAVE X **REMIX  
CULTURE**



# THE REMIX CULTURE: 4 PILLARS



*RESIST*

STANDING UP FOR SOMETHING



*RETROGRADE*

AUTHENTICITY & NOSTALGIA



*RECREATE*

MIXING UP TO DISRUPT

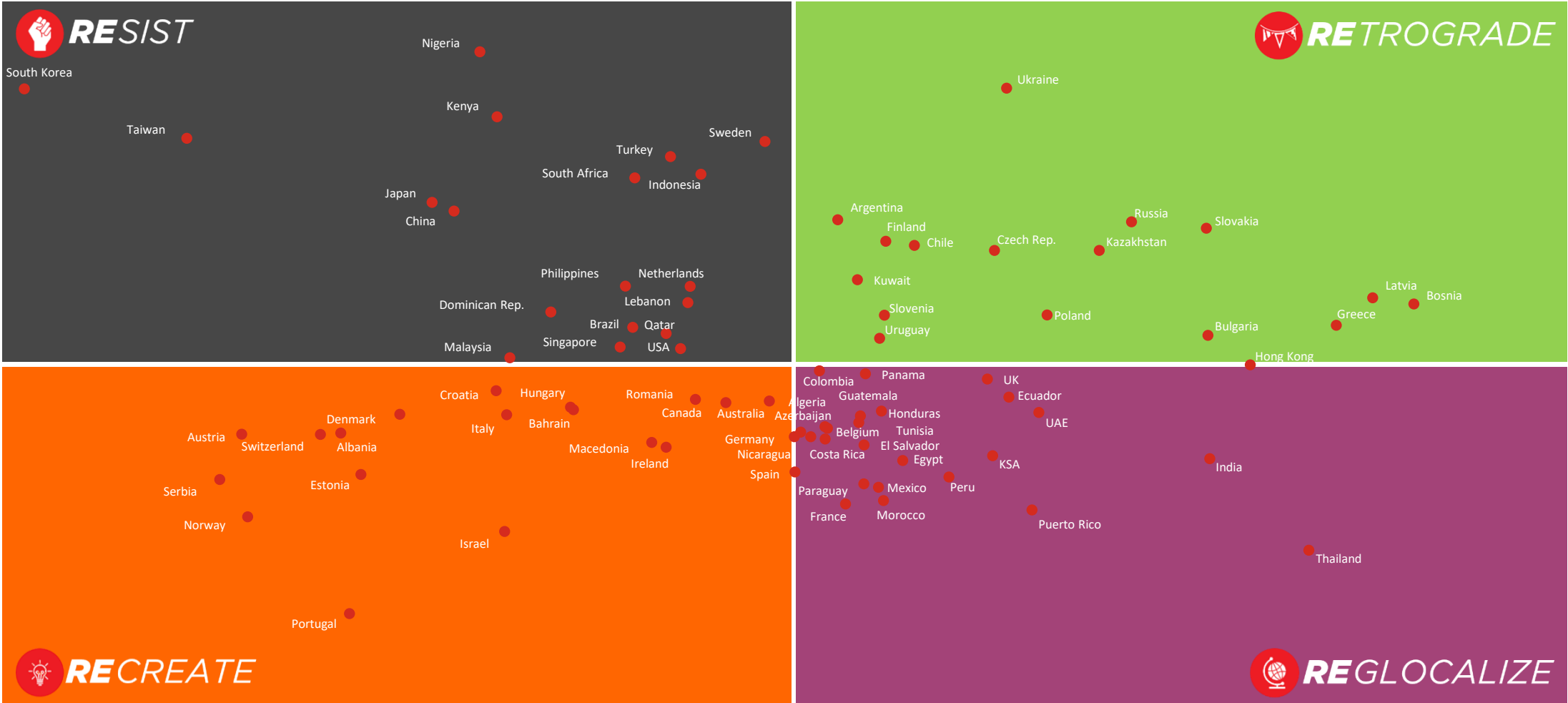


*REGLOCALIZE*

GLOBAL REACH & LOCAL CONNECTIONS



# MARKET ANALYSIS: EACH PILLAR HAS VARYING LEVELS OF INFLUENCE ACROSS MARKETS



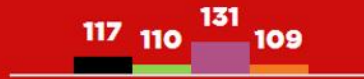
Source: Wave X – Remix Culture. All Markets  
Cultural Pillars vs. Countries



# REMIX CULTURE - 4 PILLARS BY AGE



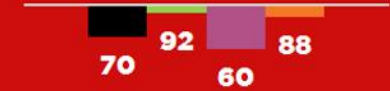
**16-24**



**25-34**



**35-44**



**45-54**

**RESIST**

**RETROGRADE**

**REGLOCALIZE**

**RECREATE**



CASE STUDIES:

# REMIX CULTURE

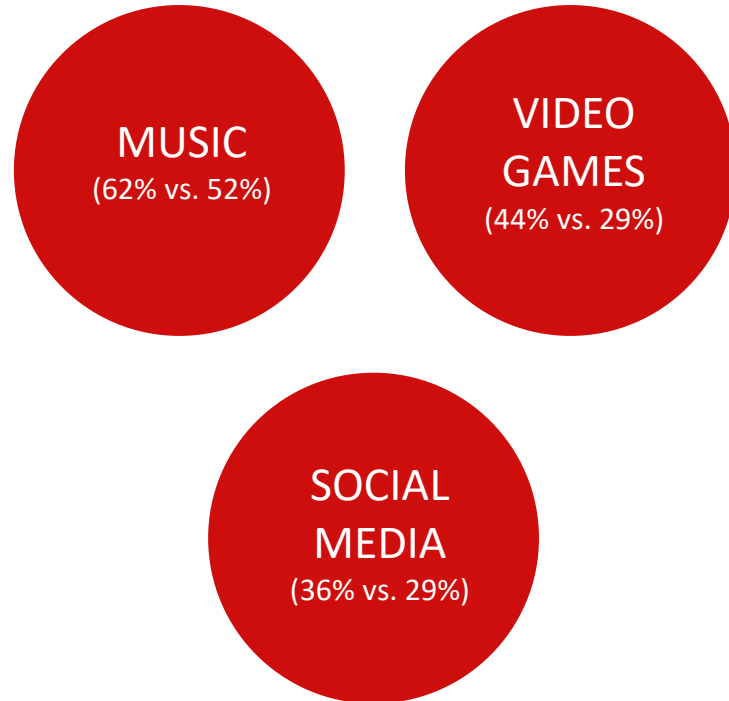


# MUSIC ANALYSIS: AGE 16-24

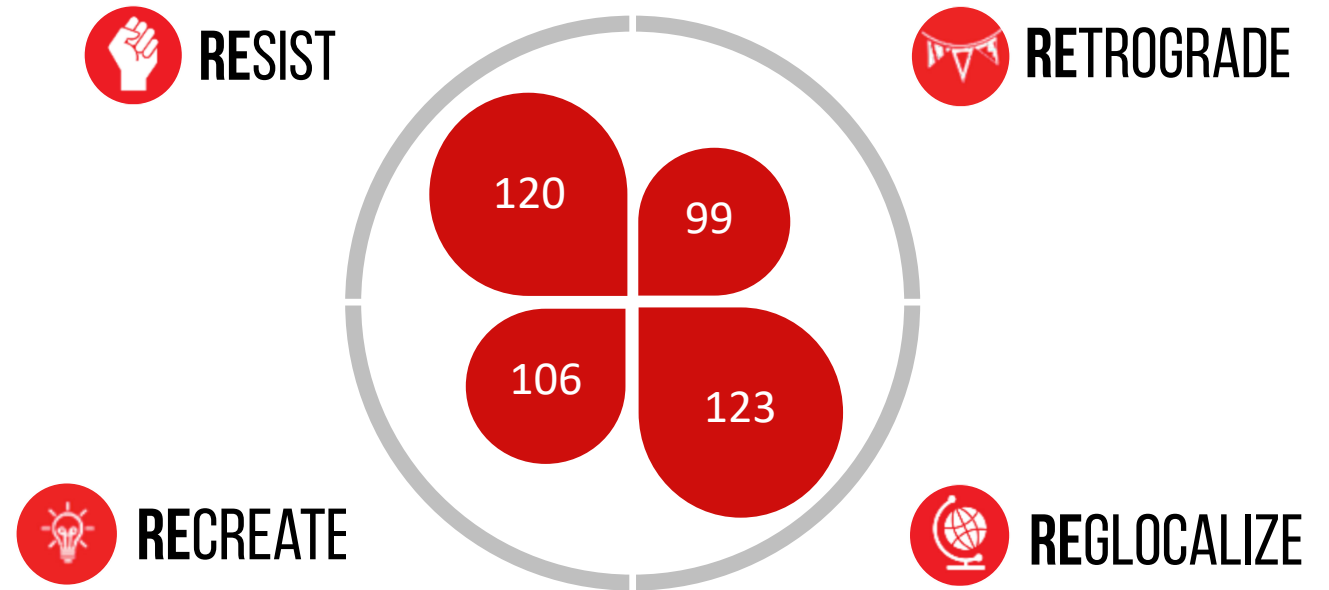


## PASSIONS THAT DEFINE ME

(Top 3 out of 6 most discriminating passions vs. All Adults)



## HOW THEY REMIX RAP/HIP-HOP MUSIC







# MUSIC CASE STUDY

## SPRITE - RAP CAVIAR/BREAKTHROUGHS





# **REMIX** **CULTURE**

---

 **RESIST**  
STANDING UP FOR SOMETHING

 **RETROGRADE**  
AUTHENTICITY & NOSTALGIA

 **RECREATE**  
MIXING UP TO DISRUPT

 **REGLOCALIZE**  
GLOBAL REACH & LOCAL CONNECTION

# REMIX CULTURE

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# REMIX CULTURE

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MIXING UP TO DISRUPT

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GLOBAL REACH & LOCAL CONNECTION

 Toy Category

# REMIX CULTURE



 **RESIST**  
STANDING UP FOR SOMETHING

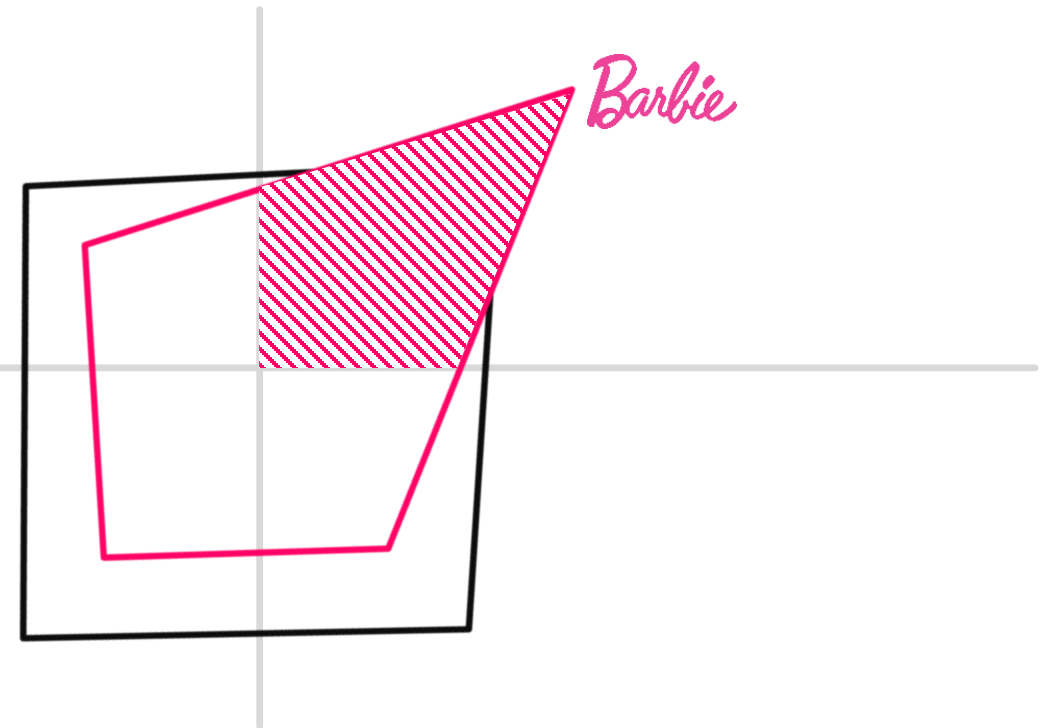
 **RETROGRADE**  
AUTHENTICITY & NOSTALGIA

 **RECREATE**  
MIXING UP TO DISRUPT

 **REGLOCALIZE**  
GLOBAL REACH & LOCAL CONNECTION

 Toys Category

 Barbie



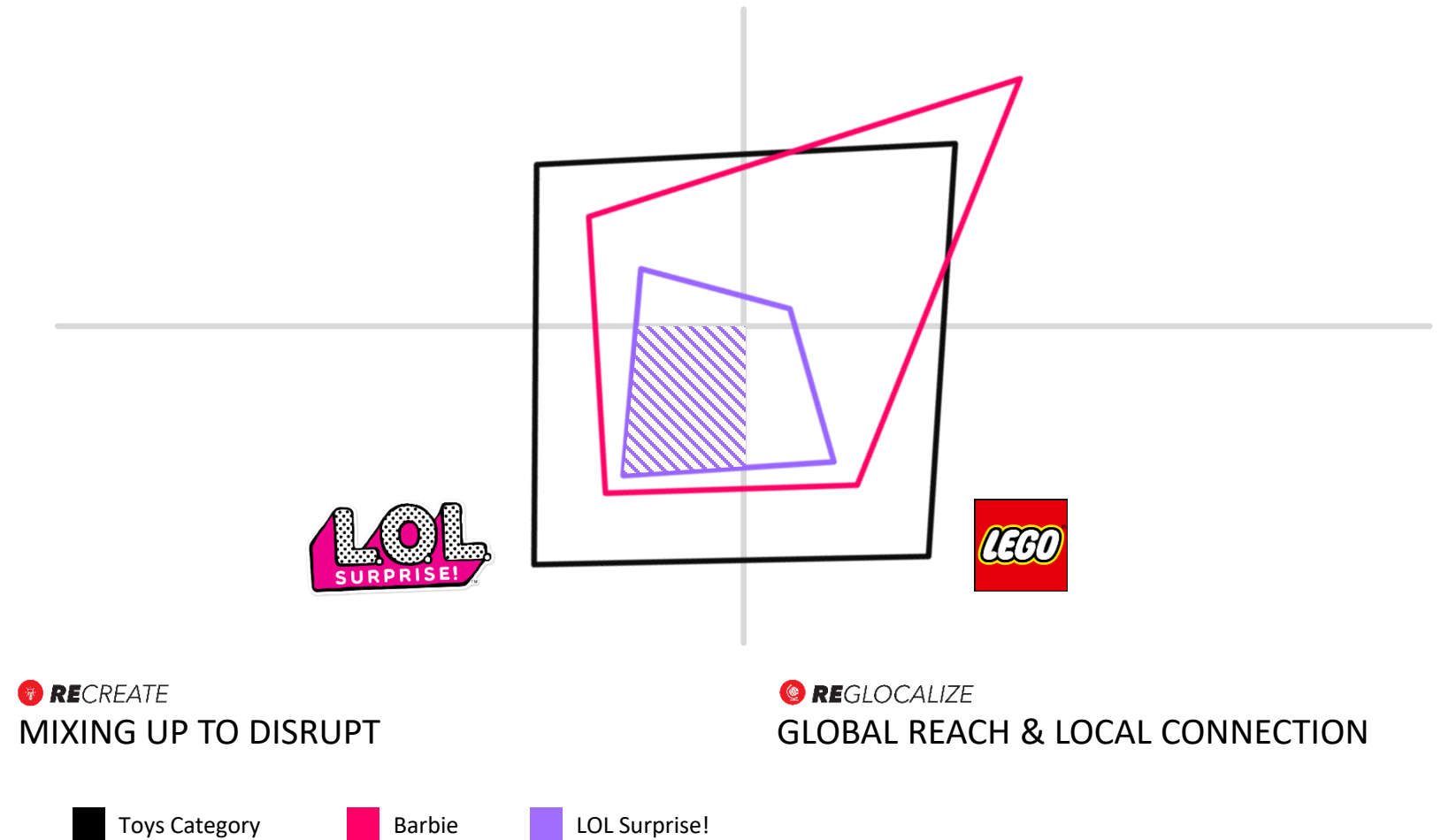


# REMIX CULTURE



 **RESIST**  
STANDING UP FOR SOMETHING

 **RETROGRADE**  
AUTHENTICITY & NOSTALGIA



# REMIX CULTURE

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Barbie

 **RESIST**  
STANDING UP FOR SOMETHING

 **RETROGRADE**  
AUTHENTICITY & NOSTALGIA



RE-IMAGINE

CREATE  
CONNECTIONS

 **RECREATE**  
MIXING UP TO DISRUPT

 **REGLOCALIZE**  
GLOBAL REACH & LOCAL CONNECTION

THANK YOU

WAVE X REMIX  
CULTURE