Human8

SPACE DOCTORS
Part of Human8

What matters 2024

From less harm to more good

We can't alter the past, but we can shape the future.

The pressure on people and the planet is at an all-time high. Political instability and armed conflicts are pushing people out of their homes. The cost-of-living crisis continues to put pressure on budgets. And the impact of climate change is becoming more and more visible.

8 out of 10 people worldwide seriously worry about the future. This is driving a collective desire for change: how can we move from less harm to more good?

Many people, organisations and brands want to make a positive change, but they often don't know how or where to start. This report maps out different ways to do just that.

We shed light on the underlying frictions and needs as well as expectations towards brands, what people say versus what they do – and the role brands play in closing this gap.

This is not a trend report. This is a story about what matters.

Raising the bar: from sustainability to regeneration

Protecting what's there is no longer enough.

Our society's current focus is to maintain the state of the environment and our communities, but this status-quo mindset is simply not enough anymore. We need to fundamentally change how we do things to safeguard the well-being of present and future generations.

78% of people globally agree we must move beyond 'sustaining' and into 'reversing' the damage done. This means we need to change our mindset and start thinking in regenerative ways to actively restore and reimagine our societal communities and ecological systems.

This is on all of us, we all have a role to play – even brands. In fact, 85% of people worldwide feel brands need to take responsibility.

We help you understand what matters and how to act upon it. This report highlights four dimensions of positive change and eight different ways you can help drive this transformation. These changes can start anywhere and be of any size. What's important is that we start now.

The method behind it all
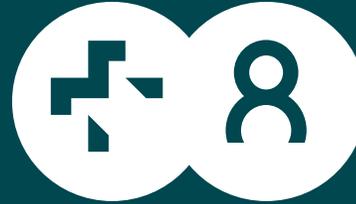
Our unique approach uses a mix of methodologies to help you understand what matters and how to act on it.

1
Expert cultural & semiotic analysis

The Space Doctors teams in EMEA, APAC and the US identified four dimensions of change with input from our unique global network of semiotic, cultural and category experts. These four dimensions are mapped in the cultural framework of 'positive transformation' that provides context for a more meaningful and regenerative future.

2
Cultural AI & changemaker perspectives

This resulted in eight culture-led codes of transformation, developed with input from Space Doctors' global network of leading-edge consumers (the Illume Guides). These were stress-tested for emergence via our global semiotic & cultural networks and substantiated further by our in-house cultural AI and analytics team.

3
Global insight community

We connected with 69 consumers from ten markets* in a two-week insight community to contextualise these transformation codes and hypotheses. Creative tasks and discussions allowed us to capture the drivers, barriers, frictions, and needs people experience with each of these codes and how these manifest in their lives.

*AU, CN, DE, FR, HK, MX, SG, UK, US, ZA

4
Quantification in 17 markets

As we want to understand what changes are manifesting worldwide and to what extent this happens, we surveyed 13,028 consumers in 17 markets**. This global quantification uncovered how prominent these changes are, the say-do gap people experience, and the sector playing field for each code.
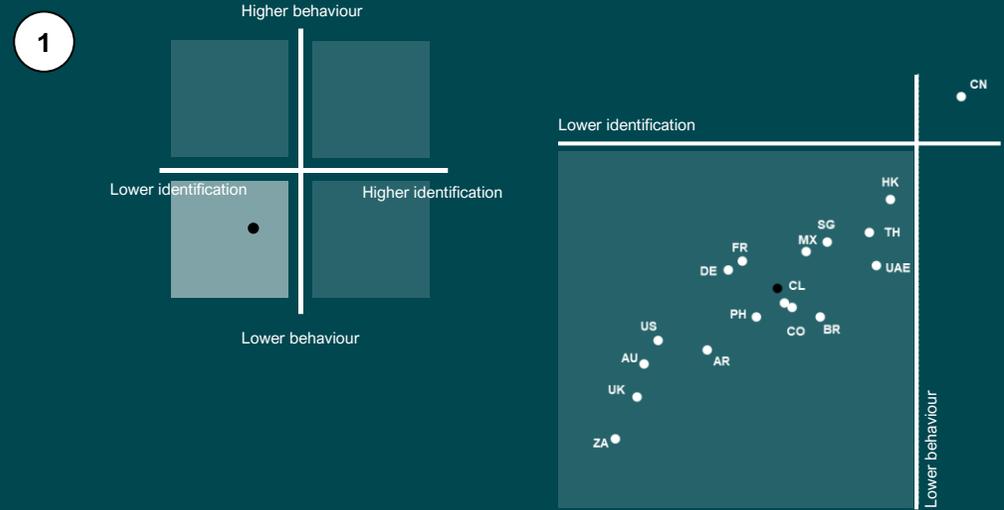
**AR, AU, BR, CL, CN, CO, DE, FR, HK, MX, PH, SG, TH, UAE, UK, US, ZA

The data story

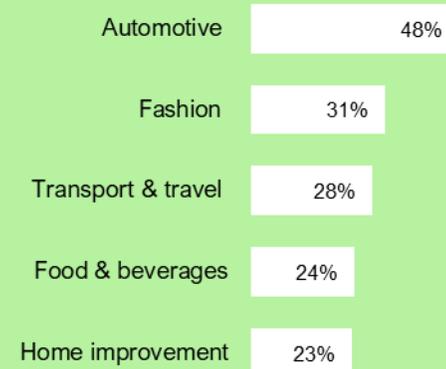For each of the codes in this report we highlight:

- (1) **Mapping:** an overall mapping indicates to what extent a code has a higher consumer identification and/or behaviour in comparison to others. The zoom-in highlights regional nuances, in which markets a code has a higher identification and/or behaviour compared to other markets or the global average (indicated by the black dot).

- (2) **Say-do gap:** this illustrates the gap between consumer identification and actual behaviour. A positive gap highlights the opportunity space for brands to help people act upon their intentions.

- (3) **Sector playing field:** gives an overview of some of the sectors people believe are already acting upon this.

Data collection: online survey with 13,028 people in 17 markets during October 2023. This was realised in field partnership with Dynata.

1

Higher behaviour
Lower identification — Higher identification
Lower behaviour

CN
Lower identification
HK
SG
MX
TH
FR
DE
UAE
CL
PH
US
CO
BR
AU
AR
UK
ZA
Lower behaviour

2

57%
Identifies with this

Say-do gap
25%

32%
Acts upon this

3

Sector playing field

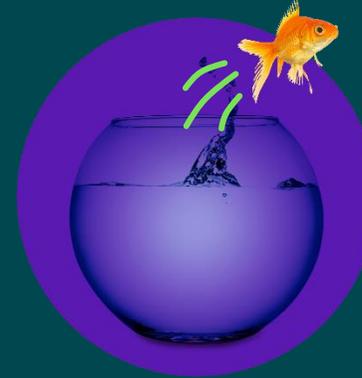| Sector	Percentage
Automotive	48%
Fashion	31%
Transport & travel	28%
Food & beverages	24%
Home improvement	23%

Four dimensions of positive change*

Surgical solutions

We're looking for precise and focused actions that can have an exponential impact

Courageous vision

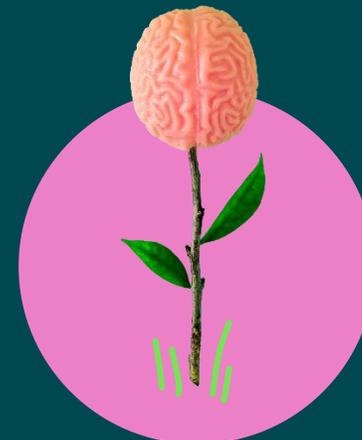We're looking for bold ideas and visions revolutionising how we think and act

Empowered minds

We're enabling and empowering everyday people to become changemakers

Rethink & thrive

We're challenging conventional paths and exploring alternative forms of organisation

Scan the QR code to deep dive into the semiotic landscape of positive transformation. Explore the cultural framework that sits behind these dimensions.

Eight transformation codes

Surgical solutions
Pressure points

Surgical solutions
Inventive applications

Courageous vision
Negative fuel
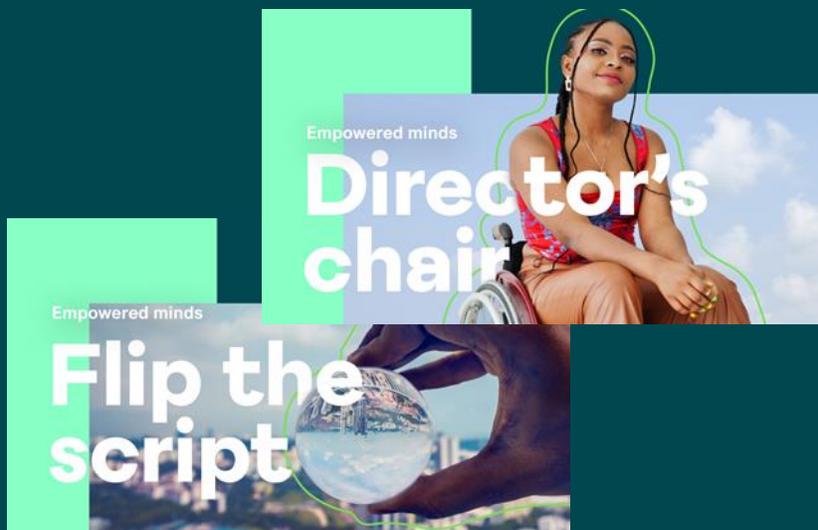
Courageous vision
Manifesting manifestos

Empowered minds
Director's chair
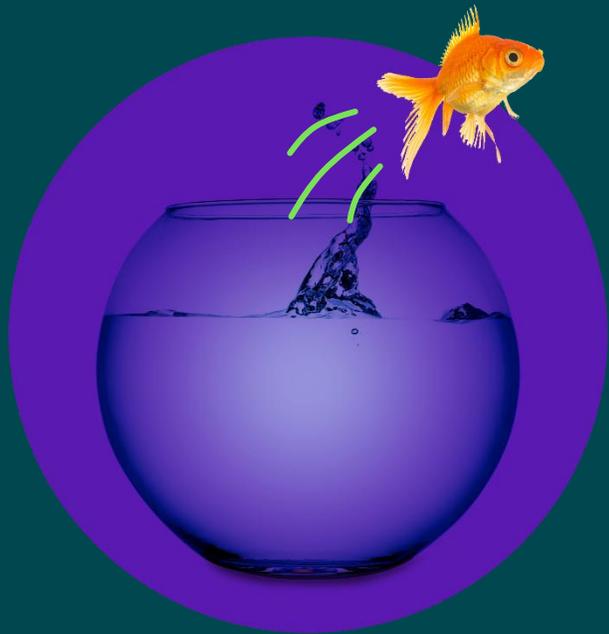
Empowered minds
Flip the script

Rethink & thrive
Sharing is daring

Rethink & thrive
Decentralised networks

Courageous vision

All it takes is a spark.

We're looking for bold ideas and visions to revolutionise how we think and act.

A new and disruptive way of thinking that has a large impact in a short time. A fresh approach driven by a dedication to make things better.
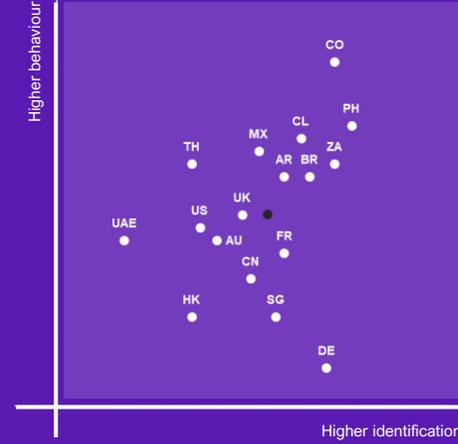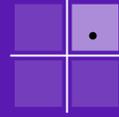
Courageous vision

Negative fuel

Negative fuel

From global warming to the many acts of unkindness in this world, we're becoming more aware of the environmental and social damage that's been done over the years. While we can't undo the past, it's time we own up to our actions.

We need to not only acknowledge the past but use it to fuel a more positive future. Take the negative and actively utilise it as a resource for something beneficial.

How brands can drive change:
Finish off better than you started. Critically evaluate (past) actions and acknowledge previous wrongs. Introduce bold, smart and creative ways to turn the negative into something positive.
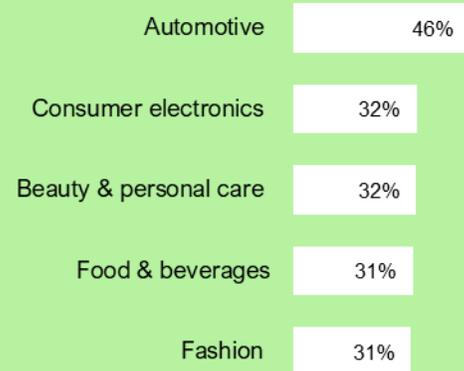

Higher behaviour

CO
PH
CL
MX
TH   ZA
          AR BR
US   UK
UAE   FR
    AU
      CN
HK   SG

DE

Higher identification

77%
Identifies with this

Say-do gap
29%

48%
Acts upon this

Sector playing field

Automotive	46%
Consumer electronics	32%
Beauty & personal care	32%
Food & beverages	31%
Fashion	31%

"Even if I was not part of either social or environ-mental damage in the past, it affects me now, so I need to take ownership and help on fixing what was damaged by doing the right things."

ZA, Gen Y, Female

> "In France we have an association which collects plastic bottle caps and recycles them to make wheelchairs for people with disabilities."
>
> FR, Gen X, Male

On Running turns carbon emissions into shoe foam through its CleanCloud technology

The brand On Running is making shoe foam from carbon emissions and incorporating it in its concept trainers 'Cleanprime'. The mono-material can be easily broken down, recycled and upcycled into a new pair. Users pay a monthly subscription to access On Running's services, which allows them to request new trainers when their current ones are worn out.

Location
Switzerland
Sector
Fashion

Traditional architecture using recycled brine waste

Location
UAE
Sector
Construction

The 'coral house' wetland exhibit explores an innovative, environmentally friendly cement made from recycled brine waste. It's inspired by the UAE's traditional coral-built houses on the country's salt flat land. As the salt dries, it creates natural blocks that have been used in ancient construction.

The exhibition aims to raise awareness of the problems of using cement where traditional architecture can make the most of naturally occurring waste.

Miller Lite turns sexist ads into sustainable hops to empower female brewers

Location
US
Sector
Beverages

Beer brand Miller Lite wants to acknowledge the(ir) historically harmful representation of women in beer advertisements. They've collected old sexist print ads and posters, including their own, and ground them down into fertiliser. This fertiliser was given to 200 female brewers, to help them grow hops and gain a foothold in a male-dominated industry.

Negative fuel

Courageous vision

Courageous vision
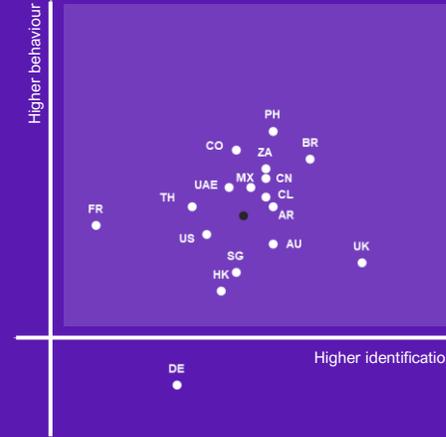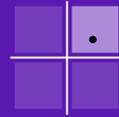
Manifesting manifestos

Manifesting manifestos

While we're conscious of the future we aspire to and the kind of world we want to live in, we often feel powerless to make a change.

We need frontrunners and inspirational figures who dare to challenge existing norms and lead with a fresh perspective — those who inspire through action and renounce things that don't bring us closer to positive change.

How brands can drive change:
Actions speak louder than words, so become the change you want to see in the world by taking a stand and leading by example. Inspire others with a fresh point of view, and don't be afraid to make sacrifices for the greater good.
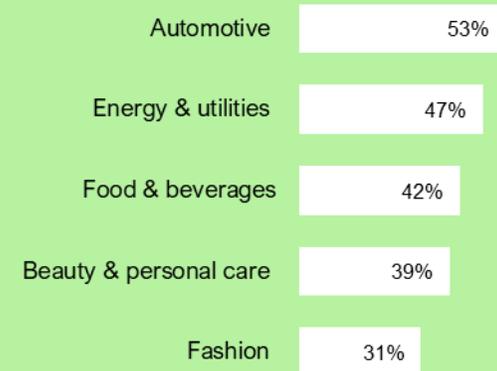
78%
Identifies with this

Say-do gap
31%

47%
Acts upon this

Sector playing field

Automotive	53%
Energy & utilities	47%
Food & beverages	42%
Beauty & personal care	39%
Fashion	31%

"Sometimes we just need that spark that will bring along endless discussion and hopefully lead to actual actions."

SG, Gen X, Male

"Many people are unable to make decisions for themselves. They need to be shown the way."

FR, Gen X, Male

"I think the needs go beyond the product. People are now more interested in what and who's behind the company. Are they doing good work?"
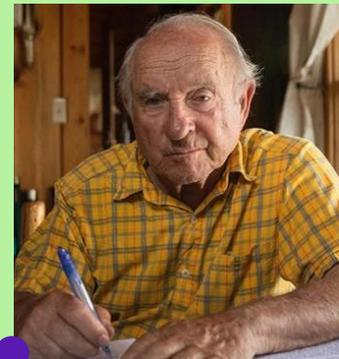
Andrew Grill, FMCG Expert

How Deplastificate rethinks personal care for a plastic-free planet

Deplastificate aims to 'deplasticise' the planet by creating waterless personal care products and installing a refillable glass bottle return system. The brand sets out its point of view on plastic, stating that it never really degrades but translates into microplastic. "The average human being consumes 40 pieces of microplastic a year. This is not right, and we have to change it."

Location
Mexico
Sector
Beauty

Pi, your personal AI mentor

Pi (Personal Intelligence) is a personal AI assistant that looks at AI as a way to better understand yourself. The chat function gives a range of interaction options from 'practise an important conversation' to 'just vent.'

Location
US
Sector
Tech

Patagonia going for purpose rather than going public

Sustainability is embedded in Patagonia's DNA. As Yvon Chouinard, the brand's founder, says: "Caring for our planet is not in conflict with running a successful business". In September 2022 Patagonia pushed their efforts to the next level, where 98% of all stocks were transferred to a non-profit which will use all earnings to protect nature and diversity and support thriving communities.

Location
US
Sector
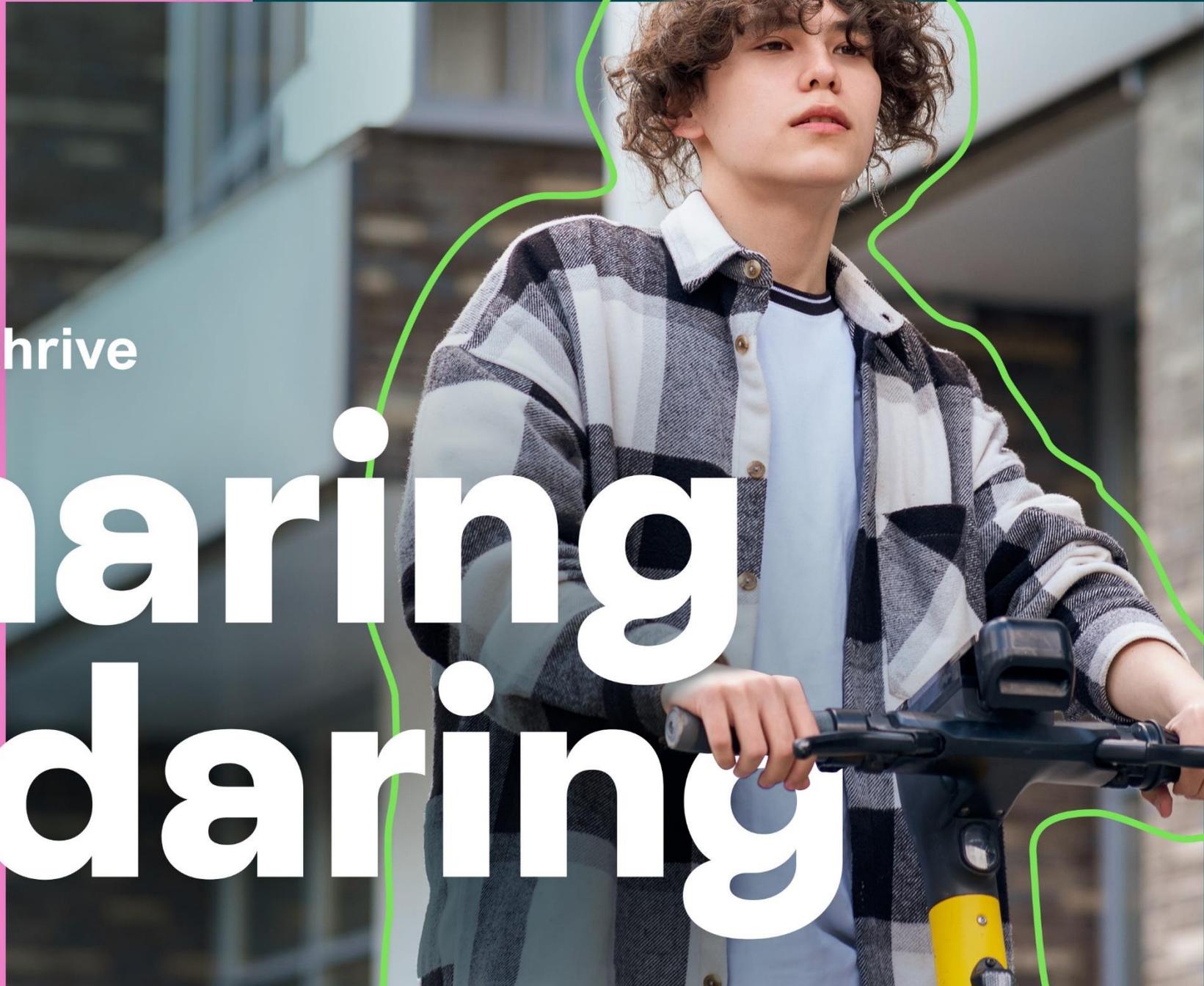**Fashion**
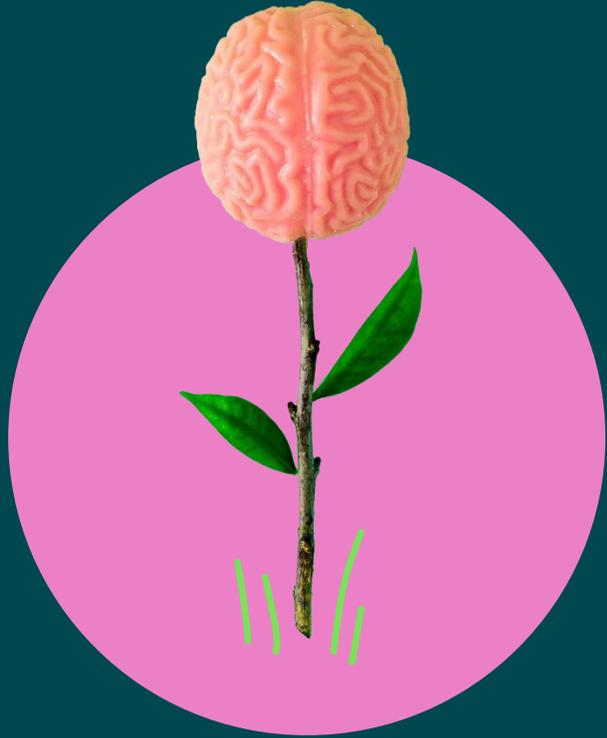
Rethink & thrive

Circumventing norms and systems.

We're challenging conventional paths and systems by exploring alternative forms of organisation that enhance access and opportunity.

Together, we're finding the strength to navigate and apply pressure to the status quo creatively.

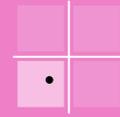**Rethink & thrive**

Sharing is daring

Sharing is daring

The cost-of-living crisis has forced many of us to rethink how we spend our money. The throwaway culture that defined our past is no longer viable, with more people recognising its negative impact on both people and the planet.

We are increasingly questioning the definition of value. Where value was previously determined by ownership and transaction, sharing is becoming the new currency.

How brands can drive change:
Move beyond just purchasing and owning products. Rethink your business models and whole ecosystems, embrace circular thinking and take responsibility for the entire lifecycle of your products.
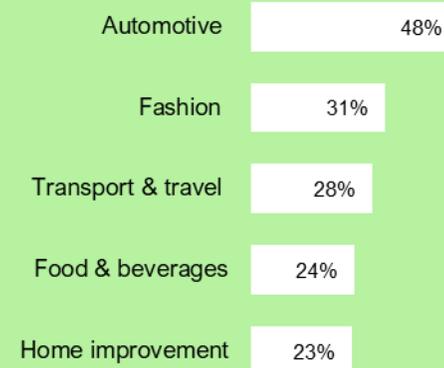
Lower identification

Lower behaviour

CN, HK, SG, TH, MX, FR, DE, UAE, CL, US, PH, CO, BR, AU, AR, UK, ZA

57%
Identifies with this

Say-do gap
25%

32%
Acts upon this

Sector playing field

Sector	%
Automotive	48%
Fashion	31%
Transport & travel	28%
Food & beverages	24%
Home improvement	23%

"Keeping up with the Joneses isn't something that's fashionable anymore."

AU, Gen X, Female

"Owning was the 20 century mantra, that's not anymore the case."

FR, Gen Y, Male

The Library of Things for affordable renting of useful items

The Library of Things is a social enterprise that helps people save money and reduce waste by affordably renting out useful items like drills, sound systems and sewing machines from local spaces – and by helping neighbours share practical skills.

Location
UK
Sector
Home goods

Sharing app Olio questions norms around sharing food

Olio is an app that helps people pass on what they no longer need to people living nearby, with the aim to reduce household and food waste. In one of its campaigns Olio boldly questioned the cultural norms around sharing food, suggesting that it should be normalised.

Location
UK
Sector
Food

Boundless Life empowers globetrotting families through learning, living, community

Boundless Life empowers families to 'live and learn around the world'. They offer help through their co-living and education program and provide families with a sense of community. Through experiences, networking events and cultural excursions, Boundless Life connects adventurous families to exchange their knowledge and share experiences.

Location
Global
Sector
Living

Vopero's hassle-free reselling or upcycling of clothing

Location
Uruguay, Mexico & Chile
Sector
Fashion

Vopero helps its users to effortlessly resell unused pieces of clothing from their wardrobe. After dropping your bag with garments, Vopero processes the clothes and creates and uploads the images to their online platform where users can easily monitor the sales process. Garments that aren't suitable for resale are repurposed by Vopero's partner, Green Bone, into pet toys, produced by people from marginalised communities. Users can also exchange items for pieces in Vopero's selection that match their style.

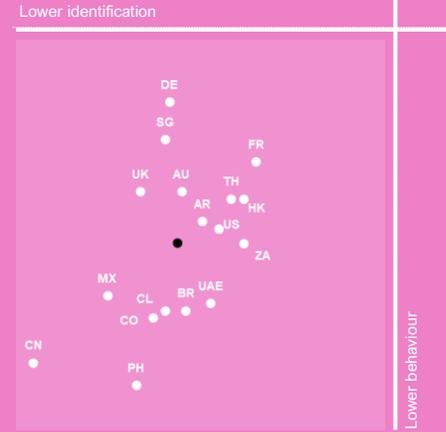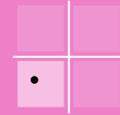**Rethink & thrive**

Decentralised networks

Decentralised networks

Having witnessed the failure of long-trusted systems, there is a growing frustration with how current institutions (e.g., law, money) are centred around authority, hierarchy and control rather than the people they serve.

We are looking for alternative forms of organisation that provide more access, transparency and autonomy. Decentralised approaches where everyone in the network has a say about the future.

How brands can drive change:
Empower people and communities by adopting decentralised thinking and initiatives to give them the power they need to drive change.
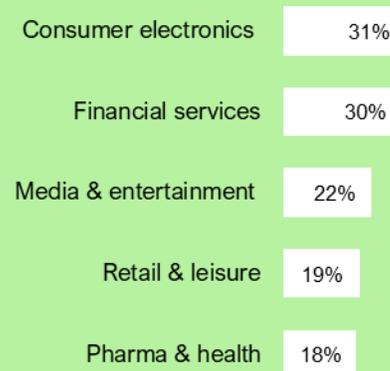
Lower identification

DE
SG
FR
UK AU
TH
AR HK
US
ZA
MX
CL BR UAE
CO
CN
PH

Lower behaviour

41%
Identifies with this

Say-do gap
8%

33%
Acts upon this

Sector playing field

Sector	
Consumer electronics	31%
Financial services	30%
Media & entertainment	22%
Retail & leisure	19%
Pharma & health	18%

"A lot of systems that served our grandparents and great-parents well, simply don't benefit people anymore."

AU, Gen X, Female

"They [institutions and systems] are centred around themselves and not the customers."

US, Boomer, Female

ObvioHealth, a decentralised approach to clinical trials

ObvioHealth uses digital technology to communicate with patients and enable remote participation in clinical trials. This innovative approach results in higher quality, real-time data that is more representative of populations that would not be able to attend trials in person. In China, for instance, the platform is used to reach people in dispersed or rural communities.
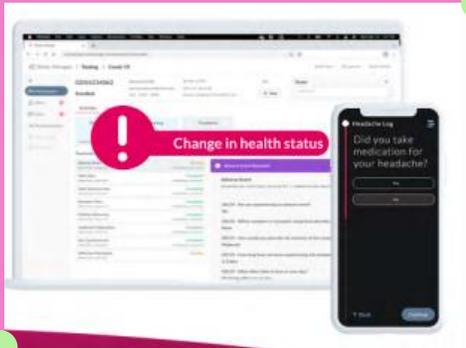
Location
China
Sector
Health

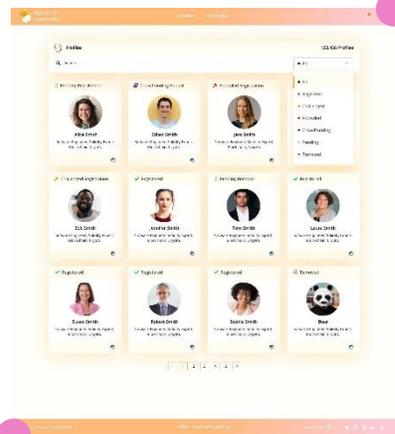## WhatsApp voice notes transform the agricultural landscape in Senegal

WhatsApp voice notes are supporting networks of farmers in Senegal to collaborate and access information in their local language. In a country where nearly half the population had limited literacy, these voice notes have become a vital tool to collectively strategise and share cutting-edge regenerative techniques.

Location
Senegal
Sector
Agriculture

Proof of Humanity to claim your online identity

Location
Argentina
Sector
Tech

Proof of Humanity (PoH) is founded based on the need to establish a more reliable, inclusive, and fraud-resistant system to verify unique human identities in the digital space. It's often used in blockchain and cryptocurrency as a way of verifying that real people, rather than bots or automated systems, are interacting with a system. To join PoH, users must provide social verification and a video submission.

Star Atlas, a player-owned gaming universe

Star Atlas is a multi-player blockchain-based online game with its own economy. The game is player-owned and fully controlled and funded by decentralised governance. Players can directly buy and sell their in-game assets to one another, without the involvement of an intermediary taking custody of these assets.

Location
US
Sector
Leisure

Empowered minds

Power to the people.

Not everyone is in a position where their voices are heard, but change often lies in these marginalised perspectives.

We're enabling and empowering everyday people to become changemakers. By devolving power and authority, we are turning them from believers to doers.

**Empowered minds**

Director's chair

Director's chair

You can't judge a situation you've never been in. People who have experienced injustices themselves know best what needs to change. Yet, it's often the more privileged groups – that are distanced from the issues – that make key decisions.

A growing frustration is fuelling the belief that we need to give a platform to those with a vision but previously lacked the chance, connections or resources to act upon it.

How brands can drive change:
Recognise and support people that are often unheard, giving them not only a voice but a platform to tell their story and install the change they need.

Higher behaviour

Higher identification

DE · UK
AU
ZA
US
SG
TH
UAE
FR
CL · PH
AR
HK
BR · CN
CO · MX
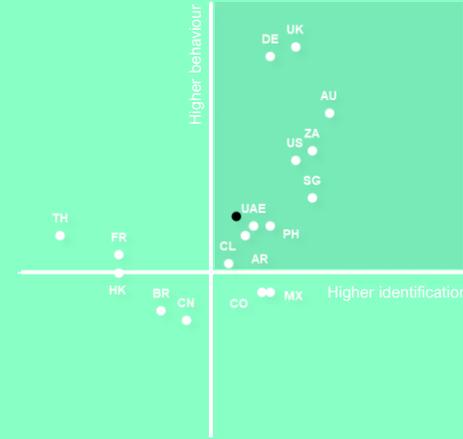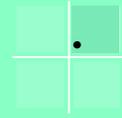
67%
Identifies with this

Say-do gap
24%

43%
Acts upon this

Sector playing field

Beauty & personal care	26%
Fashion	24%
Financial services	22%
Media & entertainment	22%
Pharma & health	20%

"Actively seek out and amplify the voices of marginalised communities, ensuring that their perspectives and experiences are heard and considered in decision-making processes."

CN, Gen Y, Female

"Few people have the time, let alone the luxury to sit and reflect on how we should build society. Many people are focused on just paying the bills. It prevents them from engaging more deeply with positive societal change."

Baphiwe, Illume Guide, South Africa

'Restaurant of Mistaken Orders' increases understanding and reduces loneliness

The Tokyo-based restaurant hires people suffering from dementia as part of their wait-staff. This initiative has a positive impact on both individuals with dementia, reducing loneliness, and the broader community, contributing to a more inclusive and understanding society in an aging population.

Location
Japan
Sector
Food

P&T Knitwear empowers people to tell their story in a podcast

P&T Knitwear, an independent bookstore and event space in New York, has a podcast studio that is free for the Lower East Side NY community to use, empowering people who might not have the means, nor access to create their own shows and narratives. They are free to record about any topic.

Location
US
Sector
Retail

L'Oréal uses training as a catalyst for inclusion

L'Oréal created 'Beauty for a Better Life', a global training programme for beauty skills such as hairdressing and make-up. It supports people in difficult living situations, particularly socially and economically vulnerable women, victims of conflicts and violence or young people who have left home or dropped out of school. L'Oréal's aim is to empower these people through training. The longest program is in Vietnam, where more than 3,003 students have graduated since 2009, with 100% finding jobs immediately. Some 603 students graduated in 2022.

Location
Global
Sector
Beauty

**Empowered minds**

Flip the script

Flip the script

Many dominant norms and labels used in society are outdated and discriminatory. Fighting these descriptions, assumptions, and expectations is draining and often ineffective.

We're realising that it's better to design our own playbook than contest the one that's laid out in front of us. It's about finding your own rhythm rather than trying to follow the beat.

How brands can drive change:
Support new ways of thinking and see them as an opportunity to learn from. Acknowledge the people you might have excluded before.

Higher behaviour
Lower identification

ZA
BR
HK
CN
PH
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MX
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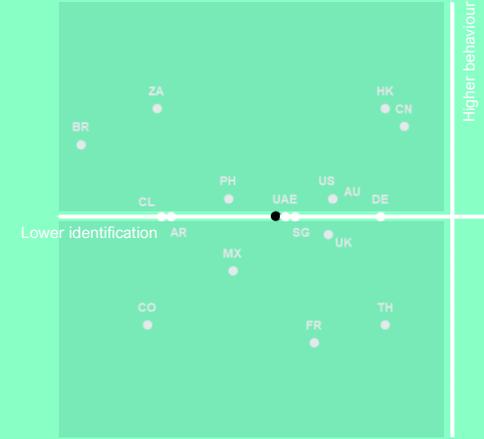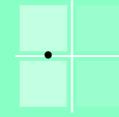
50%
Identifies with this

Say-do gap
9%

41%
Acts upon this

Sector playing field

Beauty & personal care	35%
Fashion	32%
Consumer electronics	30%
Media & entertainment	24%
Financial services	24%

"Rigid categorisation of people and things can be limiting and harmful. We should strive to see each other as individuals, with our own unique experiences, perspectives, and values."

US, Gen X, Male

"Since the dawn of time, we have never stopped putting people in boxes… Life would be so much simpler if we only had one category: the human being."

FR, Gen X, Male

Cabinet Health turns their back to single-use plastic

Cabinet is on a mission to eliminate single-use plastic in healthcare, an industry that is heavily reliant on this material. The brand delivers medicines in refillable and compostable containers, holding a mirror up to 'big pharma', asking them to join them on their mission of making every aspect of healthcare more sustainable.

Location
US
Sector
Health

Digital Nomad Anji rethinks work in rural tranquillity

Digital Nomad Anji (DNA) questions and rejects high-pressure, urban-centred work environments. They offer an alternative in the form of a community where digital nomads can stay, work, and connect at low membership and residence fees. DNA aims to offer people a new relationship with work, centred around rural tranquillity.

The community describes their outlook: "Here, as long as it does not affect others, you can choose any way of life without social pressure."

Location
China
Sector
Living

"Within a lot of systems, we simply don't know what's next on a scale that's implementable. […] We need to get farmers at the table, they're going to provide a lot of nuance and paint a fuller economic picture of what matters at the origin of the value chain."

Alyssa Whitcraft, Food & Beverage Expert

Surgical solutions

Enacting change with precision.

We don't want to do more; we want to do less.

We're looking for precise and focused actions that can have an exponential impact. We're seeking to identify and unlock the most effective alterations within our existing behaviour and systems.
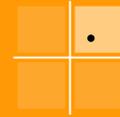
Surgical solutions

Pressure points

Pressure points

Sometimes, a single, focused action can release a more significant wave of change than many fragmented, incremental activities.

Being overwhelmed with recommendations on what (not) to do, we seek to understand which concrete actions we can take for maximum impact. Being aware this may come at the cost of convenience, how can we get there by doing less, and not more?

How brands can drive change:
Take a step back, looking inward and outward for concrete, targeted actions that can have an exponential impact - and help people understand how they can do the same.
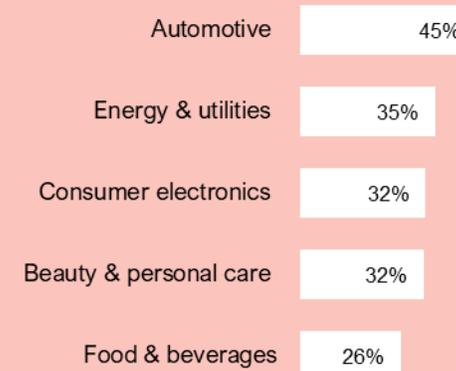

Higher behaviour

Higher identification

CL
US
AR
BR
UK
AU
PH
ZA MX
DE
CO
UAE
SG
FR
HK
TH
CN

77%
Identifies with this

Say-do gap
29%

48%
Acts upon this

Sector playing field

Automotive	45%
Energy & utilities	35%
Consumer electronics	32%
Beauty & personal care	32%
Food & beverages	26%

"The messages we get about sustainability can be overwhelming, and it's challenging to parse them and workout what's achievable and what's actually effective."

AU, Gen X, Female

"I understand that I need to take action for the environment, but I'm not sure what kind of profound impact my actions will have."

CN, Gen Y, Female

"Coming at the fashion industry with the value system of wanting to create the highest quality clothes possible to reduce consumption, means stepping away from synthetic materials like polyester and nylon elastane."

Lucianne Tonti, Regenerative Fashion Expert

On the road to zero-carbon with Element 2

Element 2 are building hydrogen refuelling stations across the UK and Ireland. This aims to enable the rapid transition of heavy road vehicles and municipal fleets, working towards a zero-carbon and zero-emissions future. According to the brand, the set-up of this infrastructure is one of the biggest barriers to rapid decarbonisation of British road transport.

Location
Europe
Sector
Mobility

Using social media innovation to democratise banking and put people first

The banking service developed by Korea's leading social media provider, Kakao, focuses on digitisation, removing barriers in a stagnant banking industry. Kakao bank provides easier access to money, accounts and loans. It resulted in millions of people having access to a bank in the palm of their hands, leading to increased understanding and control over finances.

Location
South Korea
Sector
Fintech

AI solutions to reduce farmers' overall environmental impact

Brahm Works, an innovative AI start-up, developed a digital solution to tackle soil degradation and the overuse of fertilisers, helping farmers to reduce their carbon emissions. AI-driven precision fertiliser and nutrient feeding results in optimised yield, reduced greenhouse gas and retention of soil health.

Location
India
Sector
Tech

"Single use wet wipes are seen as the only option when looking after a baby. Parents could be informed about things like reusable wipes by midwives and be given them for free."

Danielle, Illume Guide, UK

Surgical solutions

Inventive applications

Inventive applications

Many of our existing systems, networks or supply chains are not used to their full potential or are becoming obsolete (e.g. outdated manufacturing lines, empty office spaces).

Being aware that we don't have unlimited resources, we are looking for new and creative ways to maximise the use of existing systems and assets.

How brands can drive change:
Find new and innovative ways to use your existing resources and systems to avoid them becoming underutilised or obsolete.

Higher behaviour

Higher identification

PH
ZA
CO
BR
UAE CN CL
HK AU FR
US AR
TH UK
DE MX
SG
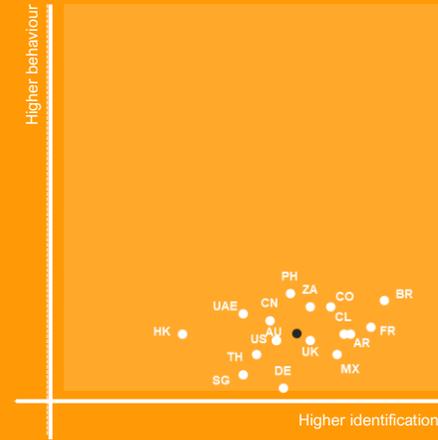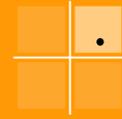
83%
Identifies with this

Say-do gap
38%

45%
Acts upon this

Sector playing field

Sector	
Consumer electronics	33%
Fashion	27%
Food & beverages	26%
Household products	23%
Home improvement	21%

"Very often I see abandoned buildings, when there are thousands of homeless people."

MX, Gen Y, Female

"It lays in the nature of our advancing industrial society that many resources and systems, which were important in former times, are not necessary anymore."

DE, Gen Y, Male

Lego Braille Bricks apply practices of play to learning

Lego Braille Bricks are designed to help children learn braille. The raised bumps on each brick have been modified to correspond to a letter or character of the braille alphabet. The bricks apply the principles of learning through play, helping all children to learn braille while being inclusive to those with partial or impaired sight. To facilitate the use of Braille Bricks in the classroom, Lego also offers online courses for educators.

Location
Denmark
Sector
Entertainment

Coca Cola bridges the last mile in bringing life-saving medicines to remote areas

In collaboration with Last Mile, Coca-Cola use their existing distribution methods of refrigerated vehicles to deliver vaccines across Africa for treatable diseases like Malaria and TB. By leveraging Coca-Cola's networks, public health departments can strengthen their systems. Last Mile also works with Coca-Cola to improve marketing and communication so that patients are aware of these services and can access them.

Location
Africa
Sector
Beverages

Precious Plastics provides the tools for people and businesses to recycle waste

Precious Plastic offers tools to collect and repurpose waste plastic into new products. People or organisations can buy a starter kit which comes with everything from machinery to an education workshop. Through Precious Plastic's website people can connect with fellow recyclers and creators, joining a big community working to fix the plastic waste problem.

Location
Global
Sector
Plastic recycling

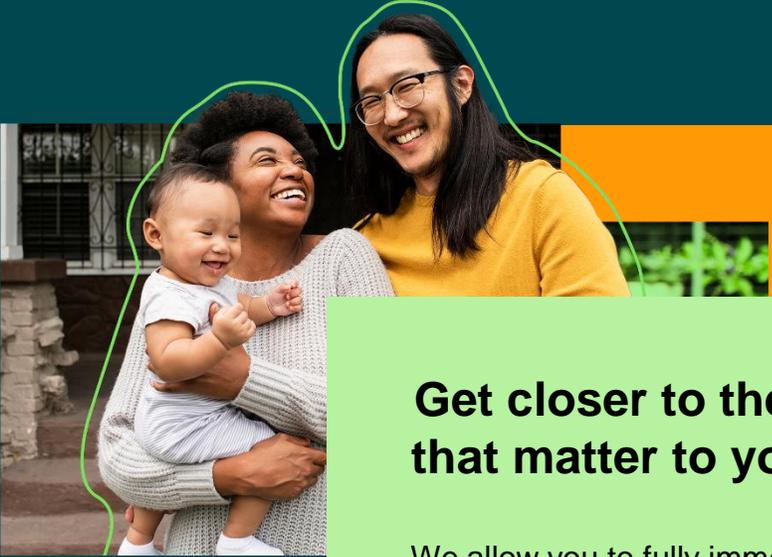Recycling Workspace   Machine Shop   Community Point
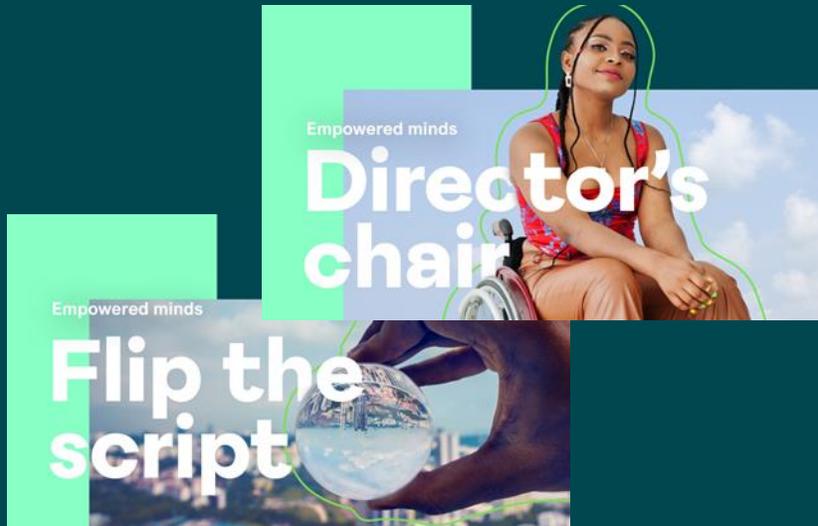
Eight transformation codes

Want to make it matter?
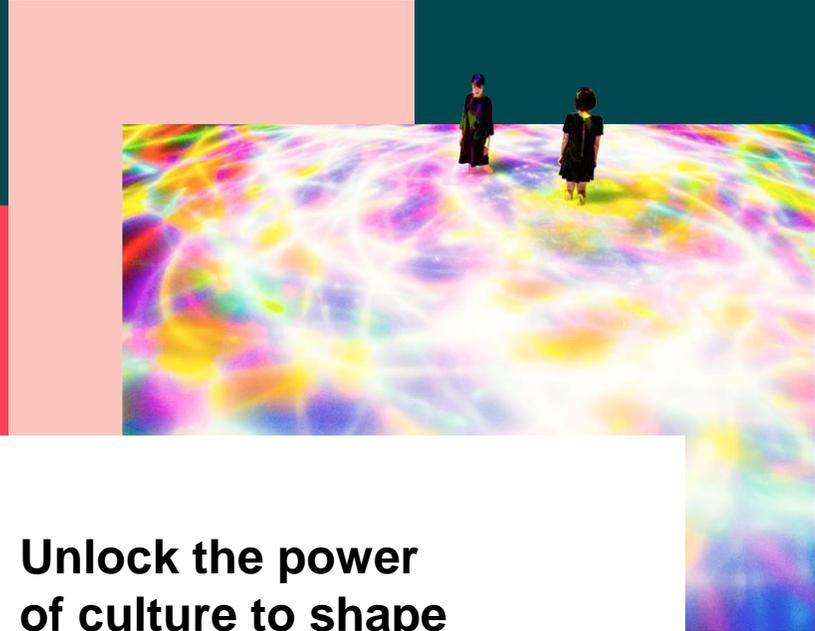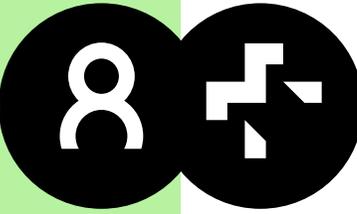
The time is now.

Get closer to the people that matter to your brand

We allow you to fully immerse in your consumers' reality, uncover relevant insights and create meaningful products and experiences.
We help you understand what matters and how to act upon it.
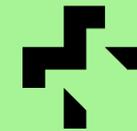
HUMAN8

Unlock the power of culture to shape the future

We reveal the powerful cultural ideas that will influence what tomorrow's consumers think, feel and do. We use this understanding to create more meaningful, future-ready, regenerative strategies and activations.

SPACE DOCTORS
Part of HUMAN8

Together, we help you do what matters!