

VOLUME ONE

CITY LIMITS

THE ERA OF CITIES

KEY TRENDS SHAPING
THE CITY OF TODAY

HOW BRANDS ARE
DOING 'URBAN'

CITY 2060

CROWD.DNA

INTRODUCTION

It's not by accident that we term our businesses as Crowd DNA London, Crowd DNA Amsterdam and Crowd DNA New York – rather than UK, Netherlands and US.

It's through cities that we find meaning. And it's in cities where, increasingly, we are all living: 30 percent of the global population lived in cities in 1950; 53 percent today; an estimated 66 percent by 2050.

As much as we may talk longingly about the great outdoors, cities are important to us in myriad ways. And they're certainly central to our work at Crowd DNA – projects take us to many of them worldwide; briefs often seek to understand how people survive/thrive in these complex spaces; how products and services can learn from our coping strategies to answer needs; and where the global commonalities of urban living give way to fascinating local nuance, unique challenges and inspiring opportunities.

City Limits* is the name we've chosen for a series of pieces in which we'll explore these ever-growing hubs of humanity; places that we find so thrilling and rewarding – but often so draining and punishing. By Limits we mean the extremes, the disruptions and the innovations – where city living might take us next.

Come with us, then, as we take a view on loneliness, the future city and how brands represent the urban experience. Oh yes, and show off a few of our global snapshots.

We hope you enjoy – both this 'mag' and life in your city, wherever that may be.

Andy Crysell, group managing director, Crowd DNA

* With apologies to the 1980s London listing mag of the same name



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**And all the globetrotters
of Crowd DNA**

WELCOME TO THE ERA OF CITIES

POPULATION: EVERYONE



More of us than ever are living in cities. As urban environments swell, what are the new opportunities to look out for – or are we just in for one big eco-disaster?

We're head first in city century. 21st century urbanisation – aka the era of cities – has exploded across the globe, with new and existing areas still set to swell at a staggering rate. And you can feel it. Be it the enormous commuter crushes in Tokyo; the ever-evolving skyline of Lagos; or the mushrooming megacities of Bangalore and Guiyang, more of us are squeezing into urban environments than ever before – and even more will soon.

The global urban population is growing at one million people each week (AppMyCity)

Back in the 1950s, only 30 percent of the world's population lived in a city. Fifty years later that had all changed. In 2001, the United Nations reported that, for the first time in history, more people were living in cities than rural areas. That number had risen to 53 percent by 2016; bringing the pace of 21st century urbanisation clearly into view.

Now, it's all about scale. AppMyCity – an online contest for city living apps – claims that the global urban

population is growing at around one million people each week. Add that to the latest UN predictions, which expect the overall population to grow by around three billion in the next 30 years (equivalent to the current size of India), and the idea that humans might one day be an exclusively urban species isn't that weird. By 2050, it's projected that a full 66 percent of the population will live in a city.

One thing is clear: cities matter now more than ever. While it's true that urban planners and city-centric brands need to keep up with the overwhelming pace of urbanisation, the small, everyday details of city life shouldn't be overlooked. Popping into a shop, getting from A to B, exercise, out-of-home advertising, a city's distinct character, negotiating between public and private space are all set to be disrupted. How, for example, will people find 'alone time' in a city of 21 million others?

Urbanisation has seen areas all over the world mushroom in size, putting undoubtable strains on infrastructure and resource. But the 21st century is also the era of tech innovation and it's worth exploring the advantages of urban density, too.

Urbanisation has the potential to correlate with wealth creation and

How will people find 'alone time' in a city of 21 million others?

better living standards for all, as well as exciting new activation spaces and opportunities for brands. After all, a city – no matter what shape or size – is where change happens.

CITY LOGOS

Guess the city...

Around the world in capital Ms, can you guess the city logo?



Answers: 1. Manchester 2. Moscow 3. Madrid 4. Mexico City

FIVE KEY SHIFTS IN CITIES OF TODAY

What makes a city?

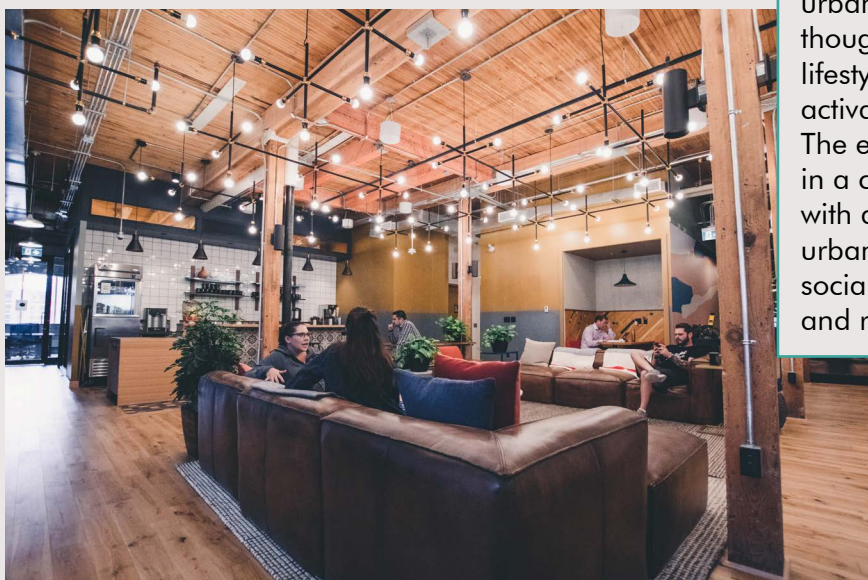
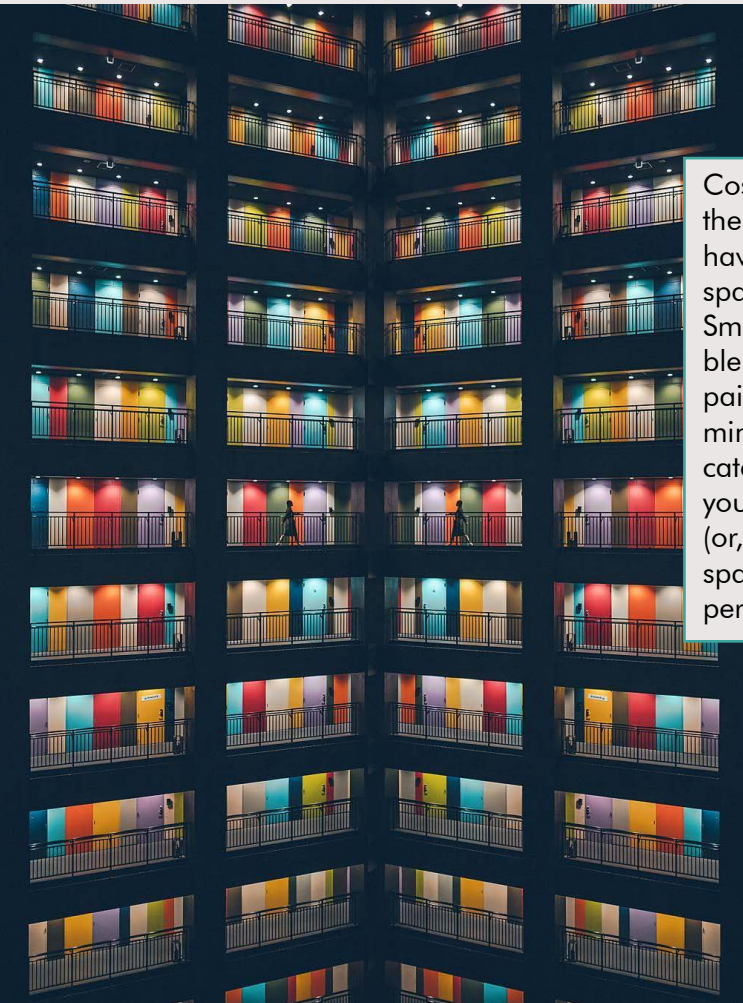
All cities are different, clearly. But constant connectivity and globalisation-on-tap has led to stark similarities, too. And, as more millennials grow into influential positions and reach their peak impact years, the blueprint of a city has changed.

LIVING

Cost of land, price of living and the huge wave of urbanisation have led to smaller and smaller spaces to call home. Smart storage solutions and blended living areas have paired with a move toward minimalism across other categories. Why surround yourself with loads of products (or, indeed, loads of living space), when you can have one perfectly optimised experience?

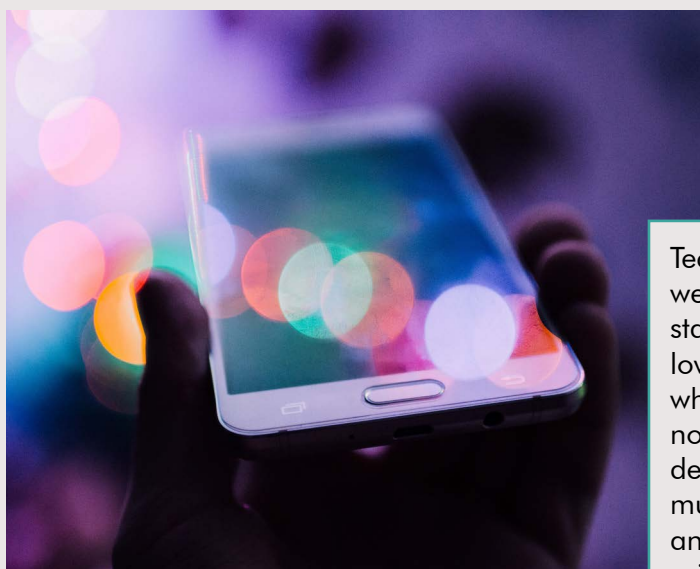
WORKING

Coworking spaces complete with gyms, social areas and, increasingly, crèches, are commonplace. A single-use office block or a soulless business district already feels stale. Instead, 'work' is part of the multifunctional urban campus, thrown thoughtfully together with lifestyle offerings and activations to match. The experience of working in a city is now blended with all aspects of the urban day-to-day, such as socialising, exercising and raising a family.



TRAVELLING

Traffic and air quality are top of mind, thanks, in part, to new commuter belts and extensive cross-country connections. While that's definitely true for cities worldwide, new forms of transport are also helping people move around in more sustainable ways. Brands like oBike and Zipcar offer PAYE mobility and speak to a rejection of ownership in favour of experience, while reducing congestion and pollution at the same time.



CONNECTING

Technology has undoubtedly changed the way we interact with our environment. These early stages of so-called 'smart cities' are fairly low-fi: think intelligent LED street lighting, which automatically dims when there's no one around. But, as tech innovations develop, expect more automated municipal services, such as driverless buses, and the inevitable debate over data privacy when popping to the shops.

BEING

The quest for honesty and transparency that typifies millennials has also extended into urban activations. New sustainable business models have emerged, enabling people to live and consume consciously within the city. Whether it's urban farms using vertical growing technologies, the rise of biophilic design or, simply, the use of reusable coffee cups; sustainable urban living is a clear feature in city's of today.



LONELINESS IN THE CITY

We're constantly connected to those around us –
yet we're also at our most alone.

The 'loneliness epidemic' is growing as our cities become 'smarter' and ever-present technology reduces the need for us to interact and connect with real people, in real life. Here's how loneliness plays out in the urban world; also how some brands are helping combat one of the biggest health issues of the 21st century.



'Affection-for-hire' industries are on the rise in Tokyo, with a marked increase in cuddle cafés, cat-rental and hire-a-friend agencies over the last five years.

Brands combating urban loneliness

Costa Coffee

'Chatter and natter' tables dedicated to those on their own looking for someone to chat to

Mush - Meet Mum Friends Nearby

A matchmaking app for city mums to tackle parental loneliness

Arts Collective Girl Gang

Speed-mating events for millennials: 'Tinder for friends, but in real life'

McVitie's

'Sweeter Together' campaign against loneliness; bringing people together biscuit by biscuit

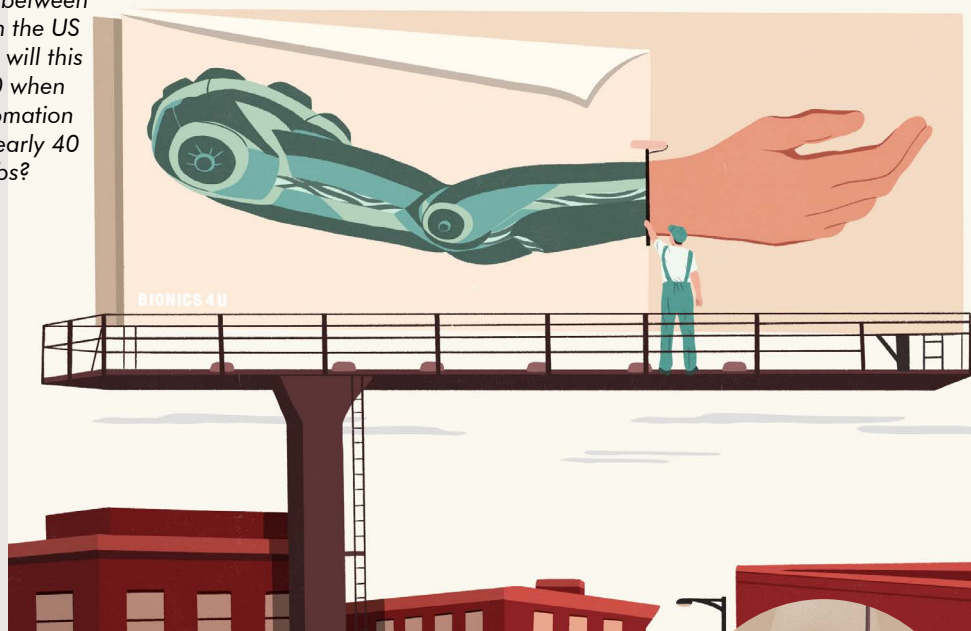
Common Co-Living

Providing pop-up furnished bedrooms in shared housing to promote co-living in cities

Red Cross

Awareness partnership with Legacy Esports, encouraging anyone in sports to rebrand their team with #BeatLoneliness

Robots in industrial use increased fourfold between 1993 and 2003 in the US and Europe. What will this look like in 2030 when it's expected automation will account for nearly 40 percent of jobs?



A third of people in NYC live by themselves, but it's even more pronounced in European cities – 58 percent of people in Stockholm live alone, a figure considered one of the highest in the world.



7 C I T Y 2 0 6 0

Running cultural insights projects in far-flung locations means we constantly hear people's hopes and fears for their city's future

What do you reckon this city will be like in 50 years? There's no better subject to quiz a cab driver on in a three hour traffic jam – particularly when you've exhausted football. And, while there's thousands of think-pieces from trend forecasters, architects and urban planners on the subject, there's much less from the urbanites themselves.

Setting aside the beautifully rendered CGI cityscapes and notions of accelerating technological change, what do actual, everyday consumers expect their cities of the future to be like?

Living Alone, Together

Come 2060, there's an expectation that more and more people will live alone in cities. People will be less likely to live in extended or nuclear family set-ups; technology will allow work and leisure to happen in physical solitude; the milestone of 'marriage and kids' will have ceded to greater individualism; and, as we see in most APAC markets, parents will be wealthier (and so won't need supporting in the traditional way). For social brands, this will mean working hard to remain part of digital connections and conversations, as well as finding new ways to encourage people in cities to interact IRL.

Cities Of Extremes

Our urbanites often share visions of a city with even greater polarisation than we see today. Cities are expected to become more 'global' and ethnically diverse as a result of migration and ageing population-related skills shortages. People worry about an ever more pronounced wealth gap, with more privatised space and de facto segregation (no smart implant? No entry!), as well as the inevitable security concerns that come with social stratification. On a more positive note, there will be goodwill to be earned from helping people bridge divides, celebrate diversity and find common values.

Office, RIP

There's a widespread prediction that working will have been transformed: hyperconnectivity, perfect VR, the decentralisation of business and on-demand

servicing of material needs. Employees will be able to work anywhere. Sadly, however, it's not all weekday lie-ins. Technology and the ability for people to 'self-teach' will mean upping the pressure to remain work-optimised. Scary stuff, but an opportunity should also open up for brands to help urbanites stay ahead in the 'work game'; by helping them network, upskill and cope with workplace competition.

Emerald City

Reassuringly, the people we meet are optimistic about the future environmental health of their city – with both developed and emerging markets cracking down on pollution, recycling and transport. They widely expect the 2060 city to be a cleaner, greener, healthier place, thanks to vertical gardens, urban greening, micro-farming and tech-enabled smart energy conservation. For optimists, the city is lush and more 'human-shaped'. For pessimists, it's heavily air polluted, crowded and congested, thanks to the planning failures of today. Any activation that will help make the city more green and 'human' will win out – even if it's just offering a brief haven in a polluted, noisy quarter. Similarly, brands that champion urban health and fitness will surely prosper.

So despite our tendency to drift toward gloomy dystopian predictions, the voice from the street suggests it's not all bad news. As our cab driver might say: the future of cities is bright, 'just don't get me started on those cyclists!'.

ESSENTIAL APPS FOR THE FUTURE CITY

So you've got your hardware: VR headset, AR glasses and iPhone 73s. Here are a few urban apps you'll need to really fit in with your discerning Futurecity mates

Buckscanner

Yearning for wilderness? Buckscanner finds rare city badlands that don't have four Starbucks



Gentridatr

A middle class must. This Kreuzberg fave reveals the date your neighborhood gentrified, by adding two years to when you arrived



Neighbourdodger

Smart-sensor alerts when your neighbour's putting out the bins. Goodbye, awkward eye contact!



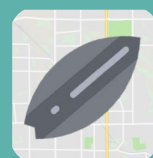
Izzithip

Mini drone that checks if that smoking hellhole's actually a hip street food experience



Hoversurf

'We don't need roads!' A surfboard in the sky. Sleek! Swift! Clean! Locate your nearest PAYE docking station and Hoversurf away!



HOW BRANDS ARE SPEAKING

URBAN

Exploring emergent visual language of urban spaces, as represented in the media and popular culture.

DIVERSE TRIBES

Urban tribes are moving from segregated to hyper-inclusive; highlighting our strength in a unified difference.



Nike, LDNR

'Nothing Beats A Londoner' celebrates the rich diversity of the city, demarcating cultural boundaries (as well as tube zones) and highlighting overlaps between London's tribes.



Charles Jeffrey, Loverboy

The fashion label's very own subculture of radical inclusion and self-expression; 'Loverboy' champions androgyny, body diversity and the city as a place of grotesque beauty.



Diesel, Go With The Flaw

Shining a light on the flaws that make us unique, within the context of the vast urban sprawl.

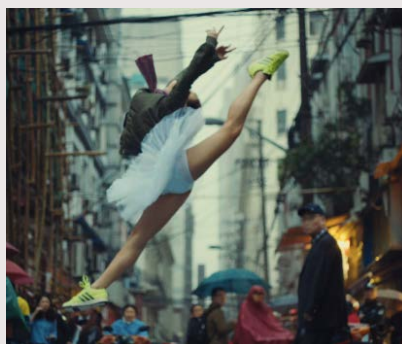
STEPPING OUT

A desire to break out of the urban norm is being expressed via spaces of social, emotional and physical escape.



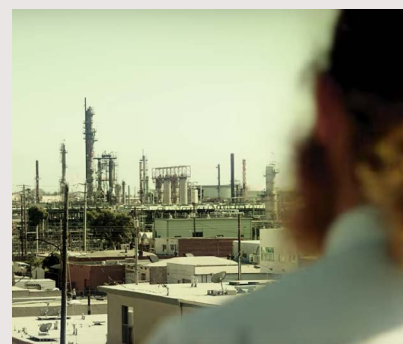
Apple, HomePod

Images of urban stress are replaced by the transformative power of dance and personal space. FKA Twigs creates her own world within the safe haven of an ordinary city home.



Adidas, One In A Billion

Individuals break out from the constraints of the collective, making the city their own and inspiring others to carve paths along the way.



Tesla, Home

A man escapes from city life after discovering a map to a fairytale kingdom, removing his suit of urban uniformity and reconnecting with a higher purpose.

THE EMPTY SPACE

Empty urban spaces are used as a backdrop for the contemporary human experience, offering a stripped back and focused exploration of society.



Heineken, Open Your World

Pairing people of conflicting backgrounds in sparse industrial spaces to examine their similarities over differences.



Childish Gambino, This Is America

An empty warehouse plays host to familiar scenes of inner city violence and joyful schoolyard games to build a chaotic image of city life from an African American perspective.

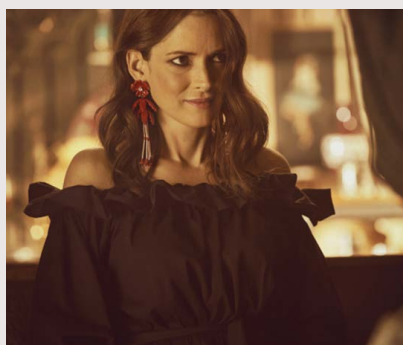


Under Armour, Unlike Any

Ballerina Misty Copeland transforms a sports pitch into a concrete stage. Poetry speaks of the social barriers she has broken through, highlighting individual accomplishment and the ability to elevate above the crowds.

CITY AS A PLAYGROUND

Urban spaces aren't just about the rat race. They're spaces of opportunity and fun – if you know where to look.



H&M, Spring 2018 By Holly Blakey

Holly Blakey's all female tango in Buenos Aires transforms the urban environment into a place of passion, unity and celebration.



Tate, One, Two, Three, Swing!

SuperFlex's 2017 installation in London's Tate Modern transformed the industrial space into an angular adult playground.



Vans, Off The Wall

Using brand imagery to transform urban spaces into playgrounds, Vans has begun to focus on expanding its reach, exploring the potential of global cities as places to play.

TALES OF ESCAPE

People search for a deeper connection with community, the natural world and themselves, by finding pockets of escape from everyday urban experiences.



Airbnb, Belong Anywhere

Escaping to the city or the country, a connection can be made by expanding your boundaries and leaving your everyday to join someone else's.



Guinness, Compton Cowboys

Challenging images of inner cities and offering an alternative to gang violence and poverty, the Compton Cowboys represent freedom against a backdrop of urban decay.



Ketel One vodka, Clean Air Bar

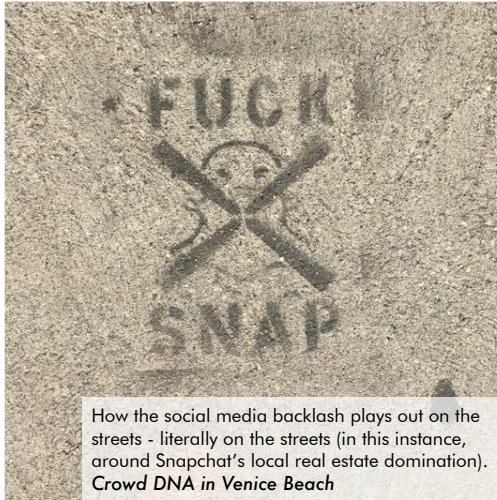
A 'clean air bar' experience offers a natural escape from the urban environment, right in the heart of it.

CROWD SNAPSHOTS

Where we've been and what we've seen in cities around the world.



Craft beer and the Kremlin? Nu da! Raising a glass at Rule Taproom's cosmopolitan beer hub. *Crowd DNA in Moscow*



How the social media backlash plays out on the streets - literally on the streets (in this instance, around Snapchat's local real estate domination). *Crowd DNA in Venice Beach*



California's legal weed industry aims high. *Crowd DNA in Los Angeles*



How does your garden grow? In Singapore it's likely on top of, inside and in the midst of buildings. Biophilic design combining the timeless desire for nature with modern urban demands. *Crowd DNA in Singapore*



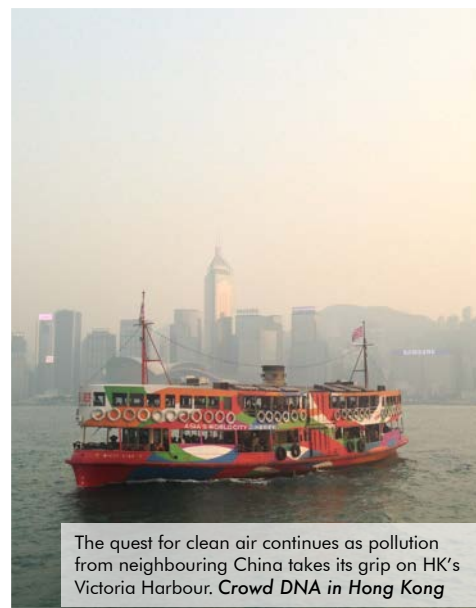
Mindfulness meets determination as spirituality-seekers try to relax in one of London's top tourist spots. *Crowd DNA in London*



The city is a playground: communal swings used by adults and children in Palm Court, a luxury shopping complex in Wynwood. *Crowd DNA in Miami*



Not just any old urban utility, Hiroshima Naka Incineration Plant combines function with award-winning architecture, proving there's always space for immaculate design in Japan. *Crowd DNA in Hiroshima*



The quest for clean air continues as pollution from neighbouring China takes its grip on HK's Victoria Harbour. *Crowd DNA in Hong Kong*



Favelas multiply through the trees in downtown Ipanema, right next to a block of luxury flats on the beachfront. *Crowd DNA in Rio de Janeiro*



One of the many NYC establishments embracing the convenience and safety of a cashless world. *Crowd DNA in New York*

Thanks for reading.

Crowd DNA is a cultural insights and strategy consultancy with offices in London, Amsterdam, New York & Singapore.

Formed in 2008, operating in 55+ markets, we bring together trends specialists, researchers, strategists, writers, designers and film-makers, creating culturally charged commercial advantage for the world's most exciting brands.

CROWD.DNA

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