Futurology Through Semiotics

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Introduction.

The scope of this paper.

This paper is titled 'Futurology Through Semiotics' so let me begin by defining those terms and explaining why I would want to write a paper about them. **Futurology** is the art and science of envisioning probable, and possible, futures. **Semiotics** is a formal, qualitative research method and a form of cultural analysis. It is increasingly widely-used in market research, and distinguishes itself by including a focus on cultural <u>change over time</u>. It is unique among market research methods in this regard. Ethnography shares the focus on culture, but the focus on monitoring cultural change over time is unique to semiotics.

Traditionally, market research has not made a strong claim on the future. Its traditional methods, based on a model of human psychology (uncovering privately-held attitudes, beliefs, motivations, prejudices, and so on), are inevitably limited to discovering how consumers feel *today.* It has had no methodology for discovering how they will feel tomorrow, or in ten years. Currently, the research method of semiotics enjoys good awareness in the market research community, but understanding of what semiotics can do is still very limited and many people think of it as essentially a method of improving visual communications such as packaging and advertising. There is relatively low awareness of the part of semiotics that deals with large-scale cultural change, and this is perhaps because British semioticians have not talked about it very much. Explaining the 'improved packaging and advertising' aspect of semiotics is by far the easier thing to focus on for audiences who are new to that method.

Like other British semioticians, I have spent a number of years introducing the market research community to the idea of semiotics and helping to raise awareness of the method. That effort has included MRS conference papers and seminars, such as *Demystifying Semiotics* (2002), which spelled out the procedure for doing a semiotic project for commercial purposes, and *Colour with Confidence* (2008) which gives a demonstration of how colours acquire meaning. I feel that awareness of semiotics has now reached a good enough base level that, as a community, we are ready to hear something new, and more challenging. The very good news is that, through semiotics, market research <u>does</u> have a claim on the future and, indeed, through the work of practicing semioticians, futurology is already happening in MR. It is here, it is available, and market research suppliers and buyers can start using it straight away. In this paper I propose to explain how futurology happens using semiotics, and to issue an invitation to the wider MR community to start taking advantage of that facility, the better to understand the consumers of tomorrow.

Why business needs futurology.

Consumer-facing businesses need futurology for the following reasons.

1. Business problems need lasting solutions, not just ones that are okay for today. If you are developing a new brand, thinking of diversifying into new products & services, or trying to engage audiences whose needs seem to be shifting, you have an investment in the future.

2. All businesses have to manage risk, and that means anticipating change. What will be the effect on your customers and your brands of technological innovation and the emergence of digital culture, of globalisation, of the continuing growth of the knowledge economy? It's a good idea to know what's in store.

3. We are all futurists, because the future is something we help to create. Every new brand and every new marketing campaign has some effect on the world we live in, to a greater or lesser degree. What can be done to give intentional change the best chance of success? It requires some insight into what else in consumers' world is changing, so that your brand can leverage the parts that will support it, so that your brand contributes to, and is energised by, larger cultural change, rather than being eclipsed.

What's coming up next.

The rest of this paper is organised as follows. First, I'll supply some background by explaining which aspects of the semiotic method explicitly address change over time. This will entail some discussion of semiotic **codes** and their role in a typical semiotic research project. Next, there's a Method section in which I'll spell out the procedure for futurological projects, showing how semioticians use codes to make sense not just of individual product categories, but of entire human cultures. After that, in the Findings section I'll discuss two or three specific futurological insights concerning consumers. Following that is the Discussion section, in which I show how these specific insights connect together to form a larger picture of consumers in the developed world. Finally, there are some Conclusions, in which I sum up the implications of this paper for the MR community.

Background: The Semiotic Story So Far.

Semiotics takes its name from *semio*, the Greek word for 'sign', and the full definition of semiotics is 'the study of signs and symbols'. A sign is any unit of human communication that carries some meaning. A heart shape is a sign for love. A smiley face is a sign for happiness. Writing 'x' after your name at the end of a message means a kiss. Moreover, there's more to communication than just words and pictures. We humans communicate with each other through thousands of culturally specific practices: through our clothing, through the design of our buildings, through the design of our social instititutions and infrastructures, through our personal and national economic policies, through the names we give our illnesses, and our preferred treatments, through our dietary habits, through our choices in entertainment.

Think, for example, of your nearest cinema; perhaps it's one of those multi-screen facilities that have largely supplanted the little independent cinemas of days gone by. Let's observe, for a moment, what a remarkably specific thing the cinema is, and how

strange it would appear to an alien from another planet. Some of the humans wander about the space, but others stand in a line (and don't look very happy about it). Strange foods are on sale that these people don't usually eat outside of the cinema: popcorn; nachos covered in a strange, orange, cheese-flavoured sludge that only cinemas sell; rubbery sweets in electrifying colours. Little bits of paper are passed around. The visitors hand over paper, or sometimes squares of plastic, on arrival, and receive a tiny piece of card in return. They then carry this around for a bit, hand over some more paper in exchange for the orange sludge, and then submit their tiny piece of card to a person who tears it before returning it to them and ushering them into a dark room. How peculiar. How does everyone know what to do?

The cinema-goers know what to do in your local cinema, to the extent that they are well-versed and familiar with British culture, of which the local cinema is a part. To those who've had the appropriate cultural training, the cinema is rich in semiotic signs that let everyone know what to think and what to do. The ticket desk is positioned near the front door, a semiotic sign that lets people know they are supposed to pay first. Poles connected by short lengths of soft rope are instantly recognisable to British consumers as an invitation to queue. The the nachos and the sweets, the appearance of which violently contradicts semiotic signs for health and natural goodness, something Brits claim to care about when it comes to food, let visitors know that this is a happy occasion; something of a celebration, when normal dietary restrictions are lifted. The fuss over tearing the ticket lets people know that they may wander freely around the foyer but may not wander in and out of the rooms where the films are screened. The evidence for everyone's reliance on their own cultural training and an abundance of semiotic signs telling them what to do is found in how quickly and easily things go wrong when people are required to operate outside of their own cultural comfort zone, and can no longer read the signs. Anyone who fails to conform to the minimum national standards of British queueing behaviour, anyone who is unable to quickly tell the popcorn salesman whether he wants a medium, a large or a family bucket, anyone who tries to invade spaces which they are forbidden to enter, will be chastised by the other members of the community who happen to be on the scene, in a range of ways from frowning and tutting to physical expulsion.

Semioticians study all of these semiotic signs: the entire scope of human communication, in all its varying forms. We do this so as to understand human cultures. Ultimately, the point of semiotics is not to develop 'better' communications: that just happens to be one, very commercially useful, application. The point of semiotic analysis is to understand human cultures; what they are made from; how they work. If you want to understand a culture, look at the semiotic signs from which it is constituted. Semioticians study the peculiarities and specificities of human cultures from two angles:

- **Synchronic analysis** means looking at human communications and cultural output, at a single point in time, across a wide range of categories or aspects of human life. Commercial buyers of semiotics have caught on to the benefits of doing this. They know enough to include in their brief concerning laundry products or healthy snacks or whatever that the scope of the project should include analysis of semiotic signs in other, related product categories, in case it turns up useful ideas. A semiotician's own idea of synchronic analysis may also include looking at the patterning of social trends on a large, intercontinental scale. Globalisation and the shrinking of the world through cheap travel and digitisation makes that an increasingly important aspect of what semioticians have to offer. For instance, at the time of writing, at my office we are doing a lot of semiotic analysis of the credit crunch, for various interested clients. The

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economic crisis itself is a multi-country phenomenon, and British consumers' understanding of what's happening is also multicultural, because their media sources include peer discussion in online discussion groups and web fora, alongside the more 'official' sources like their daily newspaper – if indeed, they still take one.

- **Diachronic analysis** means looking at human communications and cultural expression <u>as they change over time</u>. If you have encountered commercial semiotics before, you may have heard of semiotic signs being organised into **lapsed, dominant & emerging codes** ('code' simply means a group of semiotic signs that are often found together). For instance, in British culture, gold as a sign for luxury is becoming <u>lapsed</u>. It is called 'bling' these days. It's not the status symbol it once was. It no longer wields the same cultural power and influence over British consumers, so you might want to think carefully before decking out your luxury brand in gold (or conversely, depending on your market and brand values, dressing it up in a bit of bling might be just what you need). While gold was on its way out (which has taken an extremely long time and is not yet over), other semiotic signs stepped in to take centre stage, and now British consumers pay more for things that are wrapped in materials that look handcrafted and natural: paper, linen, card and straw, in unbleached and 'natural' colours. If the hand stitching was done by a women's collective in Peru or Namibia, so much the better. Many commercial buyers of semiotics are very interested to know what's 'in', and are keen to hear about emerging codes in their sector.

<u>Diachronic analysis is under-used in market research in the following way</u>. Typically, partly because of lack of awareness of what diachronic analysis can do, a project in commercial semiotics will limit its diachronic analysis to some very specific type of cultural change. For instance, we have been asked to provide a semiotic overview of changing ideas in British culture concerning parenting, healthy eating and personal finance, at various times. However, while the food client is interested to hear about local and immediate ideological change concerning different types of food, they usually do not invite us to extend our analysis to include large-scale and long-term change in British people's attitudes to work, money, sex, politics, religion, medicine, and so on. While this is perhaps understandable, this means that, because semioticans do that kind of macro-level diachronic analysis <u>anyway</u>, out of necessity, without being asked and without reporting on most of the findings, <u>an enormous amount of insight is being lost. British commercial semioticians hold a huge reservoir of knowledge about where Western consumers are heading, in nearly every aspect of human life</u>, yet the big picture that is revealed by making those kinds of connections is not typically a part of our conversations with clients.

The routine commercial activity of semiotics causes me to encounter and contemplate that big picture on an almost daily basis. I have often wished that I could hold one enormous debrief, bringing together all my clients from banking and from food, from the travel industry and from pharmaceuticals, from telecoms and from personal care, to tell them the complete story of the British consumer, how her life is changing, where she is headed, and how she finds her place in the world. The fact is, the larger the scope of your semiotic analysis, the further you can see into the future. The daily business of a practicing semiotican, over time, makes the scope of analysis very large indeed. Semioticians know something about the future, and we are ready to share.

Method.

The methodological model for futurology through semiotics is fairly simple to explain, because it does not deviate very far from what semioticians are already known to do. The process usually begins with the observation of some interesting phenomenon. Some new form of consumer behaviour or new attitude is being exhbited. Is it a micro-trend? Is it the start of something large? How long will it last? How can all of our business respond to it with new consumer goods and services? We need to understand what is going on. The new phenomenon needs an explanation.

There are a lot of ways that a new phenomenon might come to our attention. Here are some of them.

- **An interesting finding emerges from academic research,** perhaps attracting the attention of news media. In 2002, the BBC published details of a report by the economist Edward Castranova. He had completed the kind of study where countries are ranked by their gross domestic product. Unusually, and ahead of his time, Castranova included in his study the country of Norrath; a small but prosperous land that exists entirely in digital form within the online video game known as Everquest. The game has a large player base and players interact with each other in Norrath, in real time and in 3D. They farm resources and trade in virtual commodities with each other, and they generate virtual gold, which has an exchange rate with real-world currencies. Startlingly, Castranova found Norrath to rank 77th in his list of economically developed nations, behind Russia but slightly ahead of Bulgaria. A follow up analysis in 2004 confirmed his findings.

- **New information technologies tell us what new ideas are on the streets and what people around the world are talking about.** There are some nifty new technologies emerging that collect and organise potentially useful data about social trends, especially micro-trends. Anthony Tasgal speaks of one such technology in his paper, *Inspiring Insight Through Trends,* presented in the same MRS conference session as the one you are reading now.

    o There are **technologies that generate raw data,** like Twitter.com. Twitter is a fascinating resource for any observer of human behaviour. Humans love to talk, they like talking much more than they like listening, and, especially at the moment, consumers are falling over themselves to broadcast their opinions and their current state of mind. No detail is too banal or too small for consumers to be uninterested in sharing it with the world. Twitter is a large, online, message-posting facility, seamlessly linked to all the major email services such as Hotmail, and it represents a centralised information point at which millions of users upload very short comments, about the length of a text message, remarking on their current mood or activity. The express purpose of Twitter is to help people sustain a more intimate relationship with family and friends,and this it does, but since a user may choose to view anyone's and everyone's 'twittering', and search the flow of twitter for specific words, a fascinating picture emerges, of the thoughts of large numbers of people, on specific topics, in real time. The trained eye of a semiotician soon begins to detect systematic patterns in the flow of data. As I write this, Twitter is unrolling, in real time, the comments of its entire population (six million, according to the Daily Telegraph, 2008) which include the word 'shopping'.

o Then there are **technologies that collate and organise data**, These range from the very simple, to the very complex. At the simple end, you have various trendspotting enterprises that encourage people around the world to send them a message if they see something interesting going on. They take lots of little 'heads ups' from professional and amateur people-watchers around the world, who will email, text and twitter the trendspotting website as and when they notice something that's worth commenting on. The site owners then collate this information, sorting it into themes, and publish it in tidy packages for the end user. Trendspotting companies will then fund themselves by charging for subscription to their full database, releasing small samples of information for general consumption, and they may also charge for access to information-crunching technology that will display charts and graphs of cultural 'stuff' in the form of pie charts, maps of the world, or whatever you want. At the top end of this technological market, there is the unique output of computer scientists such as Jonathan Harris, whose digital landscapes of the world's emotions I recommend to you. For everyday business purposes, it's important to remember that trend technology is not magic; it is basically the same technology that number-crunches your survey results. Technology can collate and organise data in lots of different ways, but it will not do the analysis. As with any data processing software, all it will do is show you what your data set looks like. Doing something with that information requires interpretation, which only humans can perform.

- **Direct observation.** This often comes from clients, or will emerge from direct observation of consumers, perhaps during the course of a project. Maybe sales in a particular product category are falling, while in a different category, they are rising. A brand that creates a stir in one country or region fails to launch successfully in another. Small details of people's behaviour change, producing large effects for retailers, lawmakers and public services. At the time of writing, the city of Birmingham is the subject of much public discussion, within and even outside the UK, because of its proposal to remove apostrophes from place names such as King's Norton and Druid's Heath. Small details of people's behaviour change; what's a missing apostrophe here and there? People aren't as precise and fastidious with apostrophes as once they were. And yet, cumulatively, the effect of those gradually disappearing apostrophes is to cause a problem for the city council of one of England's largest cities, because now there's no standardised, agreed spelling and punctuation that everyone knows how to use and that is consistent across public documents and records. As Martin Mullaney of the council's Transportation Scrutiny Committee observed, the emergency services need to look up people's addresses in official online databases all the time. "*It would be tragic if the ambulance couldn't find your street if you forgot to use the possessive apostrophe*," he said. So now the council is going to spend a certain amount of money standardising all the place names *sans* their apostrophes, and meanwhile that minority segment of the British general public who were well acquainted with the apostrophe and its rules of use are enjoying being upset. For context; the United States dropped such punctuation in 1890, at the decision of the US Board of Geographic Names.

So, an interesting phenomenon may come to our attention via any one of these sources, and indeed, these are the sorts of things most semioticians like to keep an eye on, because that is where interesting things are known to turn up. We read the news, we keep in touch with academic research, we keep in touch with what's new in business,

we know what kinds of things the trendspotters are talking about, we keep one eye on Twitter, and Reddit, and all Twitter's competitors, and we directly observe the slowly evolving behaviour of our fellow consumers, in the digital and material world.

The method for doing a futurological investigation of the interesting phenomenon can be expressed in this simple formula, known as the **twig-to-branch formula**:

1. Identify the phenomenon. What is it? What are its boundaries?

2. Think of your phenomenon as a twig on a tree. What branch is this twig connected to? What larger idea makes it possible for this twig to exist?

3. Find out whether there are any other twigs extending off this same branch. There almost certainly are, and their number and size will tell you something about the probable thickness of the branch your twig is attached to. Is it near the trunk of the tree, or is it a small branch at the tree's outer limits?

Let me offer an example. Perhaps we've noticed that people are more concerned about having white teeth now than they used to be. When consumers are surveyed, it's clear that rates of dissatisfaction with tooth colour have gone up. More people than before think their teeth look bad, and they are more worried about it than they used to be. What's going on there? Let's think of 'want white teeth' as a twig. What branch is it connected to? Most semioticians will tell you straight away that the branch is the Western world's increasingly **visual culture**, in which everything is reduced to appearances, in which we have raised entire generations who are visually extremely literate, can see straight through advertising and can concentrate on video games for hours on end, but cannot finish a book, in which first impressions matter more than ever, in which elections are won and lost on techno-savvy and telegenic appeal, in which your photo travels more than you do, in which your very existence, in the end, is a matter of how you were seen. This is a huge branch, close to the trunk of the Western consumer's tree. Other twigs and branches extending from that same branch: sponsored weddings, private gym membership; pubic hairdressing; celebrity gossip magazines; 10 years of Big Brother and associated reality TV; CNN's unprecedented partnership with Facebook for President Obama's inauguration; YouTube; customisable avatars; Simpsonize Me.

Following the twig-to-branch formula lets you get a feel for the shape of the tree. If you study the whole tree, as semioticians must do every day, you can tell the new branches from the old by their size and placement. You can see the direction of the tree's growth: you can see whether it is forming a tall, narrow tree that points directly upwards, or a low, wide tree with a gradually expanding radius. **We can see the shape of consumer culture, and where it is heading.**

In the next section,, '*Findings*', I want to show you a couple of interesting branches and twigs from the tree, which I've chosen because they are new, and they tell us something about the direction of cultural change for consumers in the Western world. What's in their future?

Findings: Two interesting branches on the tree of consumer culture.

#1: The future of sex & gender.

As every semiotician knows, if you want to understand a culture, much is revealed by looking at how it manages gender orientations. One obvious way to monitor change is to monitor the language. What sorts of names are people using for matters relating to sex and gender? Which terms are considered 'correct', which are offensive, and why? When people get into disputes about the best way to talk about gender issues, what is revealed by the nature of their disagreement?

Well, what used to be called 'homosexuality' would be a good example. At one time, in Britain, it was perfectly acceptable to speak of 'homosexuals' as though they were one homogenous, distinct type of person, and to use a most pejorative tone. Homosexuality was, at that time, pathologised, and people used to talk about (and argue about) the 'causes' of homosexuality in the way that they argue about the causes of diabesity today. Then gay people decided that they weren't going to put up with being called 'homosexuals' any longer, and after a certain amount of political activism, the socially correct term became gay, which sounds a lot less like a disease. Soon after that, lesbians decided that they needed a mention separately from gay men, and the correct term became 'lesbian and gay'. After that, 'L&G' gave way to 'LGBT', and finally that has given way to 'LGBTQQA', which is absolutely the most correct term you can use today, in 2009. Definitions vary, but it translates broadly as 'Lesbian, Gay Bisexual, Transsexual or Transgender, Queer, Questioning & Asexual, or sometimes Ally'.

What is going on here? This fascinating twig is connected to a larger branch that has to do with a near-religious belief among Western consumers in The Individual's Right To Choose. I would particularly alert you to 'Queer', which, in the language of the LGBTQQA community, is a *political* stance and does not imply anything about human biology or physical preference, whether pathological or healthy. To be queer is to deliberately break the rules of gender and sexual orientation, to refuse to conform, even to the point of refusing to be straightforwardly gay. Western consumers believe passionately that their right to choose trumps nearly everything else, and this includes matters such as sexual orientation, which were previously thought to be immutable. There are many, many other twigs extending from the big branch of My Right To Choose, as we see from the changing ways that consumers relate to brands, use retail services, develop spiritual beliefs, find their preferred style of parenting their children, and do things like subjecting themselves to cosmetic surgery, especially gender reassignment surgery. To consider the 'surgery' twig for a moment, here's something I think is fascinating. Gender reassignment surgery is much more advanced and more affordable than it used to be. Because it is more accessible, there are more people who've had some kind of gender-reassigning surgery walking around. As their numbers grow, they are noticeably starting to include people who, for their own reasons, do not complete the full sequence of surgeries that gender reassignment amounts to. These people used to be known as 'pre-operative transsexuals', but that term is becoming a lapsed semiotic sign now because: (1) it is no longer okay to assume that the person is pre-operative and has not already completed whatever surgeries they felt they needed, and (b) it is no longer okay to assume that a person having these kinds of surgeries is straightforwardly trying to 'swap' one gender for the opposite number. After all, they might be queer.

Here's a prediction: the proliferation of categories of sexual orientation is going to be followed by a proliferation of gender categories. We can already see the early signs of

this happening, in the newly emerging social rules around use of the word 'queer' and the phrase 'pre-operative transsexual'. The long-term implication of this is that in the not-too-distant future: it will no longer be politically correct to infer someone else's gender on sight, the polite thing will be to ask, or wait for them to tell you how they want to be understood; official forms asking people to indicate their gender will start to include new categories such as 'queer', 'transitional' and 'prefer not to say'; eventually, businesses will respond to the new culture by ceasing to market products as though there were only two sets of people in the world. Marketers of 'men's' deodorants and 'ladies'' razors will start to acknowledge that the target audience for those products is not straightforwardly 50% of the population, but anyone who identifies as male or female for the purposes of that product category. Later still, new forms of product segmentation will appear, such that deodorants and razors will start to be differentiated in terms of what they can do (care for sensitive skin; tackle tough problems; fight bacteria) rather than in terms of the presumed genitalia of the user.

#2: The future of leisure.

The development of the knowledge economy in the West, which has replaced our old manufacturing economy and made us a nation of customer service representatives, Ebay vendors, media studies students, insurance salesmen, intellectual property lawyers, brand managers and semioticians has been the subject of much discussion over the years. It has become a truism, a cliché, even, to say that work has become more like play, at least for the more fortunate among us. Work used to mean labour; mining, shipbuilding. Now it means generating and trading in information. Thinking about things. Sitting in a warm, carpeted room, using a keyboard and screen to move information around from one place to another. It's a cliché to say that work is becoming more playful, especially when increasing numbers of people can do it from home, in their pajamas.

Here's a new branch I've noticed lately: newly popular forms of play strongly resemble work, and are spoken of as work. We have conducted semiotic analysis of the culture of players of *World of Warcraft,* a multiplayer online game and a mighty brand with a rapidly growing customer base that is currently 11.5 million players strong (http://www.blizzard.com/us/press/081121.html). *WoW*, as it is often known, is the most successful game of its kind, and is the title that finally managed to eclipse *Everquest,* the object of Castranova's study. *WoW* players turn out to be very similar to players of *Everquest.* They are not particularly young (certainly not children; Castranova's sample had an average age of roughly 28) and they are slightly skewed towards being middle-income and well-educated. They are, in short, the same averagely-well-off, middle-income 28-year-olds who turn up for market research focus groups. They are mostly brand loyal, for the duration of their interest in a specific game, because these games demand an enormous amount of real time investment from players in order to make any progress, so the convention is to play one game fairly monogamously and to invest significant amounts of time in that activity. Something has to give, particularly for an adult with a partner or a job, and so often the TV falls by the wayside. Many couples play *WoW* together, and recruitment into the game by a male partner is a common point of entry for the now large numbers of *WoW's* women gamers.

What are Warcrafters doing when they plough all this time into the game? What's keeping them so busy in their virtual world? If you talk with gamers, it is surprising how much the language of work intrudes into their accounts of something that is ostensibly a

leisure activity. They will tell you what they are doing. They are 'grinding', which means killing an endless line of digital monsters, for which they'll receive virtual gold, as well as assorted items such as weapons and food that they can use or sell. They are 'farming', which means travelling to an area rich in natural resources for the purpose of mining certain rare metals or collecting herbs. They are 'auction housing', which means deeply contemplating an enormous database and spreadsheet, albeit an attractively-designed one, and making careful tactical decisions about what prices you are going to charge today for commodities such as wool cloth, chilled meat and hand-crafted bullets. Despite the rather fantastic landscape of Azeroth, the virtual land where all this activity takes place, it is nothing glamorous. It is a lot like being at work.

This is a very interesting development, because for the last 60 years or so, Western consumers have been happy to accept the idea that paid work and leisure activities are supposed to be noticeably different, particularly with regard to the amount of effort involved. During the 19th century, and the first half of the 20th century, throughout two world wars and prior to the invention of television, common sense and the Protestant Work Ethic dictated that even leisure activities ought to be productive. Needle<u>work</u>, wood<u>work</u>, natural history, mastering a musical instrument: all were deemed to be an acceptable use of leisure time because they either had useful results (clothing, furniture) or because they developed the mind and were considered character-building because of an element of formal study and practice (natural history, music). After the second world war, British culture changed and relaxed considerably, a whole host of new social movements were ushered in, teenagers were invented and so was TV. A new ethic of relaxation and pleasure for its own sake emerged in relation to ideas of leisure. TV, in particular, trained entire generations to believe that leisure could legitimately consist of nothing more than passively sitting on the sofa watching 'what's on' (alternately enjoying it and intermittently complaining about it), with no larger purpose at hand. It is interesting, then, that after 60 years of passively consuming entertainment, consumers are taking advantage of new entertainment technology to <u>turn leisure back into work, the way it used to be</u>.

A new academic discipline, **ludology**, has emerged to study and analyse the changes that are going on in adult play. Ludology exists because adult leisure habits are changing, and here we find the larger branch, to which the twig of *Warcraft* is connected. Technological innovation has raised consumers' expectations of play. It has once again become a serious business. Newspaper circulation rates are declining. TV audiences are shrinking, leaving the advertising industry with plenty to worry about. Sales of CDs and DVDs take blow after blow as people fill up their iPods with individual songs, film clips and single episodes of made-for-TV shows, which they have acquired both legally and illegally from the web. Wherever and whenever they have the opportunity, people are giving up their traditional relationship with entertainment media, where the consumer's job was merely to consume and not to create. They are engineering a new relationship, where the consumer's job is to write their own newspaper (their blog), broadcast their own TV (YouTube), and schedule their own evening of music and entertainment without needing to look in the *Radio Times* to find that someone has done it on their behalf. This is why firms like **Procter & Gamble** make such a big deal about consumer **co-creation** in developing products and marcoms. I think it's important to recognise that consumers expect to participate in, and have a significant level of control in operating, the end product as well as its early concept development.

Gamers talk of their activities as work because they are serious about what they are doing. They are not 'just' watching TV (notice how conversational remarks about the

activity of watching TV conventionally used to be qualified with an apologetic 'only' or 'just'. It wasn't something to show off about.) They are earning, achieving, questing, persisting, planning, making decisions and plugging away, because they can, because the medium of the internet, and particularly the sophisticated medium of online video games, puts that power in their hands.

There is insight here for any brand that purports to know what consumers want out of their leisure time. The rhetoric of leisure used to be relaxation and escape. Now, <u>new metaphors are needed</u> for successful brands and brand communications, because consumers are no longer trying to break <u>out</u> of worlds they only partially control, they are trying to break <u>in</u>.

Discussion.

So far, I have discussed only some specific branches of the tree of consumer culture, so let me say a few words about its overall shape. There are a few, macro-level trends that are powering all of this change, and are the engine that drives consumers to: buy whitening toothpaste; think that things wrapped in straw are luxurious; fail to open a savings account; gradually stop reading *heat!* magazine and switch to *Reveal* or *Closer;* believe that their theories of nutrition and many other aspects of health are as good as their doctor's; still like getting a real birthday card in the post, and lose track of what's happening on TV. Those macro-trends, not segmented attitudes or individual tastes, are what ultimately make the difference, in the long term, to the success among consumers of Coke versus Pepsi, Body Shop versus Lush, Barclays versus Lloyds TSB.

A short list of macro-trends:

- **Visual culture**, and **Accelerating culture.** Change in consumer language shows that new forms of meaning are emerging. There's a new word in circulation now, 'long photo', which was first observed at Flickr.com, and is widely used by consumers, specifically to describe very short (consumer-created) videos, which are intentionally created that way and are not clips of something else. It is more than a photo but less than a video. You would typically find videos of this length being passed between consumers on their mobile phones, as well as being uploaded to YouTube and people's personal blogs and web spaces. The implication is that consumers operate at such an accelerated speed now, their time measured out in such small units, that a long photo is actually a relevant thing to them. It is meaningful to them to know that this isn't a 'video' that you have to commit your attention to. It takes a bit more processing time than a still photo, but not much. Consumers have got no time to spare. They want everything fast. Faster! And they want it attractively presented in a full colour graphic format.

- **Individualism,** and **Relativism.** Of course, rugged individualism, belief in the Sovereign Individual as author and master of his own destiny, is a defining feature of modern Western culture. However, due to factors such as economic globalisation and rapid technological innovation, and fuelled by philosophical movements such as postmodernism, individualism among consumers has reached new heights, with some interesting effects. On the one hand, they are more resistant than ever to being told what to do (so brands don't have much to gain from claiming backing by official authorities and government bodies); on the other hand, their collective valorisation of 'real people' over 'officials' means

that they are disproportionately ready to believe the opinions of their peers, and the opinions of 'real person' gurus. One of the perhaps less desirable effects of postmodernism in consumer culture is the advent of 'anything goes' relativism, which makes consumers feel entitled to reject, not just 'official' messages but even the most basic scientific and historical facts on which our society is founded, leading to a proliferation of personal theories about nutrition, health & illness, child-rearing, climate change, the economy and a host of other issues.

- **Return of the Real.** The advanced relativism described above creates a concomitant sense of anxiety among consumers. It is nice to have the right to be right all the time, no matter how unqualified your view, but that right comes with a loss of security, a loss of certainty that some things just <u>are</u> the way they are, and that is that. Consumers are not looking for a return to the sort of certainty that dominated Britain in the 19th century ("the rich man in his castle, the poor man at his gate, God made them high or lowly, and ordered their estate"). However, they are comforted, in the Information Age, an age where everything in the world seems reducible to a string of zeroes and ones, by things that feel Real: things that are tangible, show signs of human intervention and come with an historical back-story. It is the Return of the Real that has prompted new codes for luxury to emerge, replete with string, cardboard, straw and wood. It is the Return of the Real that leads consumers to value organic vegetables covered in dirt more than they value superficially similar veg which look uniform, are clean and wrapped in plastic. It is the Return of the Real that underpins the massive craft revival going on the UK just now: knitting is the biggest it's been since the 1940s, scrapbooking is the biggest it's been since the 19th century, and new books and websites are appearing extolling the pleasures of domestic activities such as cake-decorating and even hanging up wet laundry (yes really, see Brocket, 2008). It is the Return of the Real that is responsible for the emerging practice of indigenization (Popcorn, xxxx), which means adopting and expressing largely-forgotten traditions, such as traditional styles of dress. Here's an interesting fact about nuns, by way of example. Second-wave feminism in the 1960s and 70s had an effect on nuns, quite as much as any other population, and it was around this time that the full, mediaeval-style habit fell out of favour. Progressively-minded nuns worked hard to free themselves from the habit and now the conventional style of dress for a nun is modest 'civilian' clothing with perhaps only an over-sized crucifix or even a discreet lapel pin to indicate their occupation and the order they belong to. Here's the interesting part: there's a trend now for new nuns to revert to the full, mediaeval habit. They think it is romantic. They find it comforting. They are very aggravating to the older generations of feminist nuns who worked hard for them to be allowed to wear ordinary clothes. Religious commentators find this trend hard to explain, but in fact it is just one more twig sprouting from the large branch that is Return of the Real.

- **Death of the Author.** This handy phrase is borrowed from academia, where it describes the effect of postmodernism on literary criticism (something we don't need to worry about for the purposes of this paper). From a marketing and consumer insight perspective, Death of the Author refers to the tendency of the general public to value <u>their own</u> interpretation of a message (a TV show, an ad, a bit of DM, a viral video) over the meaning that was intended by the person or company that wrote it. That is, the audience is taking on the role of the author. Your consumers are the ones who decide what your ad means, and what your brand means. They think it's their right, now, to be the arbiters of such things. As

consumers take on the author's mantle, a number of behavioural effects result (twigs growing from the branch). There is consumer scepticism and <u>deliberate</u> misinterpretation of advertising. There is subverting, a way for consumers to rewrite ads in a way that pleases them, as I discussed in *Culture Jamming*, my MRS conference paper of 2007. Above all, there is the widespread tendency of consumers to think 'I can do better' and to set about designing their own communications and their own entertainment. I earlier mentioned the new trend for adults to turn their leisure time from play back into work, just because they can. It is because they take themselves seriously. What they are doing, however trivial it looks to an outsider, is worth enough to them that they are willing to invest work and effort to make it happen. This is where current ideas in market research about **co-creation** come from, and I cannot emphasise strongly enough how important consumer participation and co-creation is going to be for brands that want to survive the coming decades. P&G manages to include elements of co-creation in its brands, especially Dove. Amazon manages. Wikipedia would be nothing without it. Halifax managed it for a while, with its Staff as Stars TV campaign. Lush manages, with its hands-on, school art-room aesthetic it has in-store (bowls of water and bath bombs for consumers to play with). Most brands, though, aren't visibly trying.

Macro-trends change rather slowly, over a period of decades. As the above trends gradually wear themselves out (some will take longer than others to become lapsed: I predict that the Return of the Real will have a much shorter lifespan than Individualism, for instance), we'll be able to see what new macro-trends are stepping in to take their place. My predictions for the very long-term are probably beyond the scope of this paper, and indeed my own life expectancy. By way of a preview, the early indications are that following several more decades of rampant Individualism, the new ideas that replace it and make it looked lapsed will come from **Post-Humanism**. Sexual orientation has evaporated. Gender is starting to evaporate. Eventually, humanistic individualism will evaporate too, spurred on by technological innovation, particularly in the field of bio-technology. However, that is a story for another time.

Conclusions: How all this affects your business, and what you need to do.

Let me conclude this paper with some very specific recommendations for brands, which I hope will help you visualise what action you need to take in pursuance of the macro-trends I've identified above.

Barclays, your consumers have lost confidence in banks and bankers. They think you don't know what you're doing. They doubt your expertise. What's more, because they trust each other more than they trust you, they're starting to form their own banks: peer-to-peer lending operations such as Zopa. You cannot win them back with obscure, over-complicated messages about interest rates, calculated to within two decimal points. A better strategy would be to see how you can get involved in helping them to do the things they are trying to do anyway, such as peer to peer lending. Some personal finance brand needs to step forward and be the one to break the invisible wall between private individuals and professional banking operations. The alternative is to stay remote and distant, while consumers embrace the Return of the Real that they find in doing business with each other.

United Biscuits, will you please do something with the *Go Ahead!* brand. It has been underperforming for years, despite being repositioned from a 'diet' brand to a 'healthy eating' brand. It will continue to underperform until you change the name. Just look at the semiotics of it. It gives permission, it issues a licence. This might have been fine, back in the 1970s, when every woman in Britain was on 'a diet', complete with a prescriptive 'diet sheet' and a willingness to live on grapefruit and black coffee, on somebody else's orders. They needed permission, back then. However, times have changed. This is the age of My Right To Choose and I Am The Expert On What's Right For Me. You really need to take this seriously. Consumers don't need your permission to eat cereal bars. They have already decided whether that is the right choice for them. The marketing of that brand needs to concentrate on acknowledging *their own* power to make decisions about their own health and nutrition.

Clinique, let's talk about skincare. The 1950s, institutional aesthetic of the Clinique brand has served you well for a long time. Its strengths today are: (1) it is rather retro, which taps right into the Postmodern Relativism macro-trend, and (2) it is free from perfumes, which, while the Clinique range does not include the most 'natural' of products, gives the Clinique brand some access to the Return of the Real, which consumers find reassuring and comforting. However, I do wonder how many consumers manage to, or even want to, comply with the rather laborious three-step routine of 'cleanse, tone, moisturise'. I wonder how much of a barrier to the Clinique brand that laborious regime is becoming. Why not steal an insight from competitor cosmetics brand **Benefit**, which acknowledges that in our Accelerated Culture, consumers want near-instant results? You can still be clinically clean, but in a fraction of the time. Something to think about.

Tate & Lyle, are you taking full advantage of the UK craft revival? Are you sure you are doing everything you can to get consumers baking again? This is a perfect time to talk to consumers about baking, but you must reach out to them. You can't hide behind a wall of advertising and remote celebrity chefs. You need to get out there, into the public space where your consumers are. Remember, they trust Real People (including each other) much more than they trust the word of any official, so you need to get into the places and spaces where trust flows freely. Stage events. Organise activities in store. Organise activities out-of-store. Organise cake-decorating sessions in bars and pubs. How about decorating Britain's city centres with some Banksy-style 'graffiti' made out of icing – you could get consumers to join in, helping to create it. Call it a public art project. How about an exhibition of sculptures made out of cake, with lots of opportunities for the public to have a go. Consumers are in the mood to play with food. How are you encouraging them?

Microsoft, please sort out some basic usability issues. In your sector, there's a constant proliferation of new products, driven by technological innovation and not by actual consumer need. That would be okay if people could work out how to use the products they already have. Yet how many of your customers can successfully synchronise their mobile phone or PDA with MS Outlook? Almost none of them. We are in an age where peer to peer, word of mouth recommendation is king and is more highly valued than any official ad messages, no matter how beautifully designed. You need consumer goodwill. You need consumers to tell each other how simple the products are, how intuitive they are to install and set up, how easily they work, how they let you forget that you are negotiating with a piece of technology and let you focus on the thing you are trying to do with that technology. There is a reason why Nokia has 40% of the world handset market; ease of use. Your consumers have developed a huge sense of self importance and self esteem, because of Death of the Author, because of their interest in co-

creation, or, to put it even more accurately, self-creation. They don't want to be outsmarted by Outlook. Put your customer back in the driving seat before you saddle them with yet another version of Windows.

In this paper, I've taken the opportunity to reveal the macro-level thinking that semioticians engage in, beyond the details of this or that specific project. I've spelled out the twig-to-branch formula for understand interesting behavioural trends, and I've made some predictions for the future, in the medium- and the long-term. There's a lot of vision in semiotics, and that vision includes the future; a future in which this paper invites you to share.

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