

2024 M2M Report

Marginal behaviours that are moving towards the **mainstream** – and what they could mean for your category, and your brand

What happens in the margins stays in the margins. Until it doesn't.

HELEN EDWARDS, IN 'FROM MARGINAL TO MAINSTREAM'

Whenever I talk to marketers – which is pretty much every day – it's not long before the vexed question of growth crops up. Where is it going to come from? Last year I attempted to answer that, with the publication of 'From Marginal to Mainstream: why tomorrow's brand growth will come from the fringes – and how to get there first.'

What two years of years intensive, cross-cultural research had shown me was that marginal behaviours and fringe ways of life can break through to popular appeal. They can go mainstream. And when they do, consumption patterns change abruptly, powering new routes to market and creating new winners and losers – a phenomenon I called 'consumer-driven disruption'.

The rise of veganism was a key example – a life choice practised well inside the 1% of the population that broke free to fuel a vegan food & beverage category now worth \$22bn. Close analysis of the years preceding that surge demonstrated that the marginal-to-mainstream (M2M) journey can be plotted – that there are signs, signals and motifs to alert marketers to what's over the horizon.

What is the next 'veganism'? What are the behaviours that will go mainstream and ignite new growth? For this report I have worked closely with the team at Kantar to extend the research exploration across new territories, with new diagnostic tools. The results will inspire you. Today's margins are tomorrow's pot of gold – if you know where and how to look.



Dr Helen Edwards
Adjunct Associate
Professor of Marketing at
London Business School

Author, 'From Marginal to Mainstream: why tomorrow's brand growth will come from the fringes – and how to get there first'



The vegan surge
Veganism goes mainstream – and powers a \$22bn global food & beverage category.

x2

Kantar's data shows that when brands find new space, they double their chances of growth.

Room for growth
There are still exciting new opportunities in vegan fashions, furnishings and beauty.



The breakthrough book
that explores over 50 marginal behaviours and fringe ways of life.



Marginal behaviours are breaking through faster

The 2024 study went further than the pioneering 2022 study in two ways. First, we used Kantar's Digital Analytics to supplement the quantitative fieldwork. Second, we reran the original quantitative study and added a new country – Brazil – to give more cross-cultural breadth to the original UK and US data.

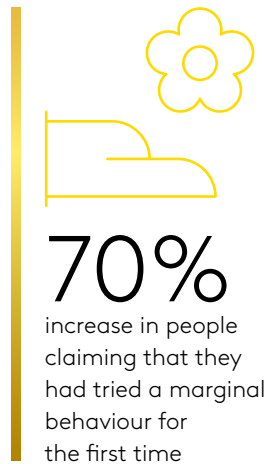
One of the most interesting general findings was an average 70% increase in people claiming that they had tried a marginal behaviour for the first time. This was especially pronounced in the US, where the biggest increases in trial were seen in microdosing, insect protein and the quantified self. In the UK, it was new nomads, polyphasic sleeping and microdosing that saw the sharpest rises.

This generalised increase in interest and trial is probably down to a combination of factors. Social media is of course playing a key role in generating awareness: people love to share unusual content. But if you look at the lead behaviours, they are not just unusual but also ways for people to 'live better'. Microdosing

is gaining mainstream interest for its ability to manage anxiety and depression; insect protein is not only a cheap, low-fat source of nutrition, it is better for the planet; finally, quantified self puts people actively in charge of managing their own health.

The Gen Z accelerators

The other factor that will influence the continued trial and uptake of marginal behaviours is the nature of the biggest generation on Earth: Generation Z. Born between 1996 and 2010 – with the oldest now 28 and the youngest 14 – these are the first true digital natives, characterised by their open-mindedness, lack of tribalism and social activism. We can expect them to exert an increasingly significant influence on wider society and we predict that the take-up of marginal behaviours will be part of that influence. Globally we are already starting to see this uptake as Gen Z are 32% more likely to have tried a marginal behaviour than Non-Gen Z consumers. This is especially evident in the UK where they are 53% more likely.



Brazil: new region, new data

In this region, in our first year of data, we saw relatively lower levels of trial. The most tried behaviour was 'zero wasters', followed by homeschooling. General awareness of the behaviours was reasonable across the board at around 20% of respondents. Modest levels of trial relative to the US and UK might best be explained by a lack of opportunity. That could change.



Marginal behaviour definition

A behaviour or life choice practised by fewer than 3% of the population

- Entered into voluntarily and repeated or maintained over time – so not just a one-off or seasonal trial of something novel
- Not based solely on religion or politics
- Not a reflection of mental disorder or anything that would obviously harm self or others
- Could be enhanced by technology but not technology driven
- Not simply a consumption choice, but a rounded human behavioural pattern that might prompt multiple consumption decisions across multiple categories



92%

US marginal behaviour
increase in trial versus 2022



46%

UK marginal behaviour
increase in trial versus 2022



Increase in people
trying a marginal
behaviour versus
2022

2024 M2M Rankings

The rankings of the top 10 behaviours is a scale of the likelihood to go mainstream for the behaviours that we tested. In each country, the ranking was created by assessing and weighting a range of factors including propensity to try, actual trial and conversely strength and nature of any resistance.

In all three countries we see similar behaviours occupying the top five slots: zero wasters, homeschooling, quantified self, living from the sea, new nomads.

Four factors unite the top five behaviours:

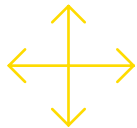
1 Any mainstream resistance is more likely to be practical than emotional. This means business could play a role in helping them become more practical, maybe by offering a 'diluted' form or a way of getting a flavour of the lifestyle.



2 All enjoy reasonably high awareness, with entrepreneurial activity helping keep them top of mind – especially for the quantified self, with the apps Zoe and WHOOP.



3 All invite innovation inspiration across multiple categories. For example, living from the sea has innovation opportunities in packaging, healthcare, food & drink, beauty and clothing.



4 All have clear links to macro forces shaping society. For example, new nomads is driven by sustainability, human connections and optimised self.



Rank



- 1 Zero wasters
- 2 Quantified self
- 3 Living from the sea
- 4 Homeschooling
- 5 New Nomads
- 6 Microdosing
- 7 Polyphasic Sleeping
- 8 No soapers
- 9 Wicca
- 10 Insect Protein



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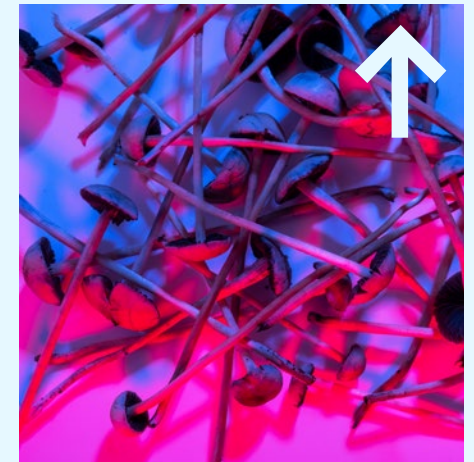


Low flyer with potential: Insect protein

Insect protein was in the bottom third of the 2022 rankings and sits firmly at the bottom in all three countries in 2024. This reflects the visceral disgust people feel about insects, even as they accept the rational and environmental arguments in favour. That balance could shift towards acceptance as more entrepreneurs enter the space and find ways to make snacks, bars and protein powders palatable – or persuade people that it's a great solution for their pets. And we note that in the enhanced analytics that Kantar conducted for all behaviours, twice as many people were willing to give insect protein a go than in 2022. Meanwhile the EU is looking to add its support through legislation. Bottom line: despite its low ranking, this is one to keep your eye on.



Heading higher: Microdosing



In the 2022 index, **microdosing** was firmly in the bottom half of the behaviours tested. Now it's hovering around the halfway mark. In the intervening two years we have seen increasing publicity around the mental health benefits of taking small amounts of psilocybin. In the UK, as things stand, it is still illegal. In the US it is legal in Colorado, and decriminalised though illegal in certain cities, including San Francisco and Washington DC. In Brazil it has a more ambiguous legal status. But the appeal is growing, and that could imply multiple opportunities in the wellness and food categories. Look out for broader legislation change.

Focus on the Top 5

#1



Behaviour:
Zero wasters

Rank:



What it is:

People who fit their family's entire weekly recycling into a single jam jar.

Where it could take you:

This is about eliminating as much waste as possible from lives and dumping less trash on the planet. The research behind the ranking reflects a strong desire to live more sustainably, held back by issues of practicality. There are lots of offers already out there in recycling, but business needs to think beyond that. While fully committed zero wasters might be few, they signal an appetite for compostable packaging alternatives and simpler ways to refill, reuse and remove packaging completely.

#2



Behaviour:
Quantified self

Rank:



What it is:

Daily measuring and recording of personal metrics.

Where it could take you:

This is an exciting area, with entrepreneurial activity raising awareness and opening it up by offering people a way to do it 'a bit'. ZOE, for the microbiome, is the most obvious in the UK, but there is also WHOOP for heart health and Oura smart rings for sleep. Additional digital analytics show strong growth potential. Opportunities for mainstream businesses across multiple categories might also be found in offering 'diluted' offers. This is one that will repay imagination. Pet care, skin care, financial services, education, and food & drink are all areas that could have potential.

#3



Behaviour:
Homeschooling

Rank:



What it is:

Parents electing to educate their children at home.

Where it could take you:

The desire for homeschooling from the purists comes from wanting to free children from a standardised and formal curriculum, and allow them to pursue their interests and particular talents (academic, athletic, artistic). The ranking reflects a strong score for wanting to try, with resistance being primarily practical. This means there could be opportunities to develop diluted adjuvant services in content and events, in both the online and offline spheres. The financial services sector could also get involved, helping people find ways to fund a more rounded education. And there are implications for flexible working and attracting talent.

#4



Behaviour:
New nomads

Rank:



What it is:

What: Living permanently in motor homes.

Where it could take you:

What we see in the appeal of new nomads – and its close cousin digital nomads – is the desire to live and work more flexibly. Longer lives mean the days of ‘education, work, retire, die’ are gone. Our research showed more people wanting to try it and a desire for practical help. This has multicategory implications for innovation in financial services, travel, education, technology, home and storage solutions.

#5



Behaviour:
Living from the sea

Rank:



What it is:

Harvesting ocean plant kelp, which grows abundantly in coastal waters, and using it as a natural ingredient and resource.

Where it could take you:

Ocean kelp is extraordinary – sustainable, rich in protein, and with less impact on the planet than other foods or resources. Our additional research indicated an increase in licenses for kelp farm development, reflecting entrepreneurial activity. Consumers show growing interest, and resistance is low – a happy combination that presages opportunity. Food and drink are obvious areas but will need careful development as people are wary about taste. There are also opportunities to use kelp as an ingredient in wellness and beauty, clothing, packaging and even furniture.

Ones to watch



Over 50 niche lifestyle behaviours were highlighted and examined in 2023's Marginal to Mainstream book. Others continue to emerge as those ones did, reacting to societal themes and world events or gaining traction through social media. These newer examples, touching on environmentalism, race, health, relationships and families, could be ones to watch.

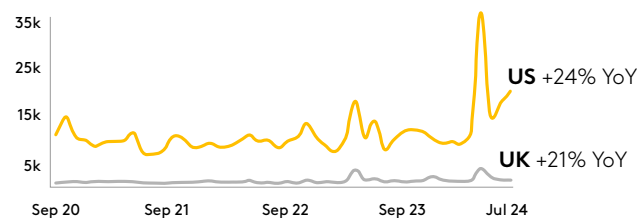
Natalists

Natalists believe that the reproduction of human life is a key objective, and therefore advocate for a high birth rate. In response to a broadly universal population decline (associated with cultural modernisation), the pro-natalist movement is on the up.

- According to UN statistics, the number of countries with pro-natalist policies, such as paid maternity leave, family allowances and childcare funding, grew from 20% in 2005 to 28% in 2019
- Elon Musk told a Meloni-fronted conference late in 2023 that industrialised countries should make more children or their cultures 'will disappear' and their economies will be threatened (Musk has 12 children with three different mothers)

Could be relevant to: baby & child care, education, household aids, automotive, travel

Search volumes related to Natalism



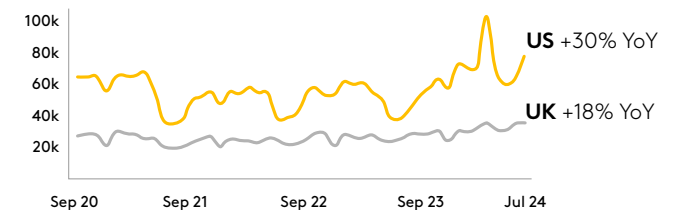
Underconsumption core

This lengthy hashtag has been used more than 130 million times on TikTok. As a reaction to fast fashion and over-consumption, it urges the opposite: buy as little as possible, re-use, re-work and fix what you already have.

- Those sharing tips and tricks online often call themselves 'de-influencers' and now believe that wearing an outfit multiple times is a badge of honour
- Sabrina Pare is a key driver on TikTok, telling her 250,000 followers to remember that 'everything you've bought is still on this earth'

Could be relevant to: retail, fashion, B2B suppliers in packaging, waste disposal

Search volumes related to Underconsumption core





No-flyers

It's a movement that cares about how people move. No-flyers turn their back on air travel because of its 'unnecessary fossil fuel use', out of a conviction that 'global warming presents a clear, present and dire danger for humanity'. A more dilute, and arguably more realistic, form of the life choice is to encourage people to think before they fly, and to at least try one year of no-fly travel.

- The movement started in Sweden, where the world's most famous climate activist, Greta Thunberg, is a keen advocate, once taking 32 hours to get to Davos by ferry and train, while 1500 private jets delivered other attendees one by one
- Campaigner George Monbiot found it easy to adapt. 'Once you've made an intellectual decision', he says, 'your feelings seem to follow it'

Could be relevant to: travel, tourism, business systems, technology



Buying Black

This movement grew out of the racial reckoning of 2020 and the energy of the Black Lives Matter campaign. With the spotlight thrown on Black communities and businesses, hard facts emerged that were pretty raw – for example, that Black-owned businesses are turned down disproportionately by banks for loans.

- At a BLM event, British boxer Anthony Joshua urged people to Buy Black, and rapper Swiss (ex So Solid Crew) founded Black Pound Day, which directed people to Black-owned companies in sectors like entertainment, fitness, sports, food, health, hair and beauty
- Aggregators began to pop up to help people find, support and buy from Black-owned businesses: webuyblack.com in the US and black2business.uk in the UK, while Lloyds Bank run an accelerator programme specifically for Black entrepreneurs

Could be relevant to: financial services, retail, multiple consumer sectors



Sunseekers

This isn't just about getting a week at the beach; research has shown that people who spend more time in the sun tend to live longer. Despite the increased risk of skin cancer, sun exposure is inversely correlated with other cancers, and those who are exposed to lots of sun appear to have longer life expectancies than sun avoiders.

- The skin is the body's largest organ, packed with sun-responsive chemicals like melanin, releasing beta-endorphins which play a role in stress relief and pain management
- Pelle Linqvist's 2014 study had followed the health of 30,000 women over 20 years. On average, women who spent more time in the sun lived for one to two years longer than those who avoided it, even taking into account factors like wealth and exercise

Could be relevant to: healthcare, beauty, travel, technology



Entrepreneurs are leading the way

Five M2M innovation stories to inspire you

Entrepreneurial activity can be found in almost all the marginal behaviours in the scale. Innovating from the margins and getting ahead of the consumer and the competition fits well with the entrepreneurial mindset and approach to testing, learning and pivoting.



Grub Club (Insect protein)

This is dog food made using insect protein. It was started by London Business School MBA alumnus Alessandro Di Trapani who, along with his co-founder Hugh Petit, wanted to reduce the impact on the planet of the pet food industry, but also provide tasty and healthy food for pets. The answer came in the form of Black Soldier fly larvae. Insect farming produces 96% less CO2 than traditional livestock farming, contains pet essential nutrients and amino acids and is hypo allergenic.



Agoprene and Barnacle Foods (Living from the sea)

Norway-based biotech business Agoprene develops furniture from seaweed. Its eco-friendly foam is used in pillows, mattresses, sofas and soft furnishings. Normal foam is made from environmentally damaging petrochemicals. At the consumer end of the spectrum is Barnacle Foods. This Alaska-based start-up describes its role as 'Stewards of the sea' and promotes kelp as the ocean's 'multivitamin', which it uses in its range of sauces, salsas and seasonings.



Reborn (Zero wasters)

Reborn makes planet-friendly homewares: bins, hangers, washing up bowls, drainers and more. It uses recycled plastic, produces locally and designs for reuse and repair. All that, and super-stylish colour and design, means that at less than a year old it has secured exclusive distribution with John Lewis.

Mendi (Quantified self)

Mendi is a Swedish start-up that aims to improve the brain health of millions via its headband and training game. The headband monitors brain activity, and the game helps strengthen the neural pathways.



Recompose (Home burial)

Home burial is where people lay to rest loved ones in gardens, back yards or private land, to keep them close. It's impractical for many. But the whole category of alternative burial and more personal ways of remembering loved ones after they die has potential for innovation. One of the most interesting is Seattle-based Recompose, which specialises in human composting. Using alfalfa, wood chips and straw, in about 30 days the body becomes a nutrient-dense soil that can be used to enrich the land.

Conclusion

This report is the topline findings from a wealth of primary data that Kantar has gathered and analysed. It consists of:

- Extensive quantitative data sets from UK, US and Brazil on the top 10 behaviours. These give a full breakdown on awareness, attitudes, the nature of resistance and frictions, and what might fuel growth
- Beacon analysis using both the quantitative data and digital analytics to give a more nuance and insight into the potential and application of the behaviours for innovation

A rich dataset that could be used to:

- Inspire a breakthrough innovation session
- Inform existing innovation plans
- Inform and inspire brand positioning in commoditised categories
- Provide a data-driven foundation to breakthrough innovation

A process for consumer-driven breakthrough innovation

Increasingly, we see established businesses challenging their teams to combine incremental innovation with a consistent effort to find the next breakthrough opportunity. Kantar and Dr Helen Edwards have developed an approach to meet that need and de-risk the process. It utilises the rich primary dataset on marginal behaviours, proven methods to unlock the potential opportunities and Kantar's existing Marketplace innovations tool to test, learn, iterate and experiment.

A 4-month end-to-end process that could be used to

- Develop M2M breakthrough innovation ideas relevant to your category and brand
- Develop new ways to address specific marginal consumption challenges

All innovation is risky, but this new dataset combined with our rigorous approach means you can stay ahead of the competition by confidently staying ahead of the consumer.

The original M2M research unearthed **8 'beacons' of analysis** and action that could both predict the potential of a marginal behaviour and point to ways for businesses to realise that opportunity.



INTENSITY



RESISTANCE



MISALIGNMENT



VECTORS



REFRAMING



REVERSAL



ACCELERATORS



DILUTION

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