

Working with the BRIC family forecasts

As the largest so-called emerging economies, BRIC countries have much in common. But they also have very different cultural, historical, and political trajectories. The BRIC Family Forecasts map and the accompanying digital videos are designed to guide you through this complex, often uneven terrain.

HOW TO READ THE MAP

The map is organized in rows and columns. Each row is a driver of change—a big, emerging pattern that can serve as a filter for understanding the changes in emerging economies. Each column is an impact area: these are the areas of daily life where the family forecasts will play out.

Scattered across the map are individual family forecasts—issues and innovations, concerns and aspirations about the future. Many of these forecasts are illustrated with quotes and photographs that the families themselves took.

Hot spots of innovation show where many hopes and fears converge to create focal points on the map. You can think of these as topics where many families chimed in at the same time, raising the volume on their forecasts.

Start with a Guided Tour

The CD that accompanies this map is a good way to see the highlights of the family forecasts. It introduces the big drivers of change. For each driver, an IFTF team member tells you a story about a family that captures the essence of change. This is a good way to get oriented to the five big messages of the map.

Look at What They Say

The quotes on the map make it personal. They take you into the minds and hearts of the people who are remaking our world. Spend some time just reading these quotes. For each one, think about how you might respond—what you would tell them about your company, your products, your own thoughts about the future?

Strategize in the Hot Spots

Think of the hot spots as an innovative lens for viewing your market. Some of them—like “No Mood to Compromise” or “Teneviki—Shady Business” may pose challenges that you need to address. Others may suggest new opportunities. All of them point to ways to reach out to families in emerging economies.

Explore Implications

On the back of the map are brief summaries of the key messages in each impact area and a few business implications. Look at the map and circle four or five forecasts that you think are most important and list the implications for your organization.

lenses of change

FIRST GENERATION IN A NEW REALITY

Their parents were immigrants to a new kind of global economy. Today's BRIC youth are the first generation to grow up in the landscape of economic prosperity. Like first-generation offspring of immigrants throughout history, they are confident, adventurous, and eager to succeed by new rules. They are also pioneers in a world of pervasive digital mobile media. Over the next decade they will be leaders, innovators, and trendsetters worldwide. Only one generation away from a non-Western world, they will create unique youth markets, media, and styles.

WOMEN AND MEN REVISITED

BRIC women have a growing confidence in their world. They are leaving their traditional roles behind and remaking the rules governing gender. Even the hardships of migrant urban ghettos are often preferable to their old roles as wives and mothers in rural villages. Meanwhile, some men are also redefining what it means to be male, developing new skills, looking after children, doing more housework. In short, gender-defined roles are up for grabs.

NEW ECOLOGIES OF PRODUCTION & VALUE

Ten years from now, the BRIC countries will not look back and see a straight line of progress from handmade economies through an inevitable industrialization to modern high-tech enterprise. Instead they will see an evolutionary process in which multiple ecologies of production and value co-exist, creating an unexpected landscape of opportunity, innovation, and risk. BRIC families are creating their own, non-Western futures, with a diverse set of middle-classes, new kinds of consumers, and unexpected entrepreneurs.

NEW SOCIAL CONTRACTS

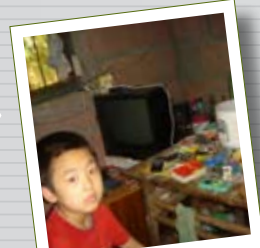
Families are the bridge between the formal institutions of society and the intimacy of personal relationships. In the BRIC countries, families are redefining their expectations and obligations to one another and to a shifting set of supportive institutions. What was formal and sacred is losing its sacredness; and what was intimate is becoming formalized into new guiding ideals. Over the next decade, families will continue to reinvent social relations at home, in public, and in the marketplace.

THE SEARCH FOR PLATFORMS OF PERFORMANCE

BRIC families are in the midst of a level of rapid change that is forcing them to adapt to wholly different economic and social realities. Longterm uncertainty is driving them to look for new platforms of permanence. This quest will lead to surprising mashups of tradition and modernity, a collage of aesthetic preferences, and perhaps a host of new fundamentalisms, as people try to hold onto something in a tidal wave of change.

PEOPLE

LEFTOVER KIDS



"Every teacher is responsible for one leftover child."
Sichuan
Rural parents leave village children behind

THE NEW ME



"For the last generation, they couldn't live the life they liked. Nowadays, we can freely choose."
Chengdu
Open embrace of the future

EDUCATED WOMEN



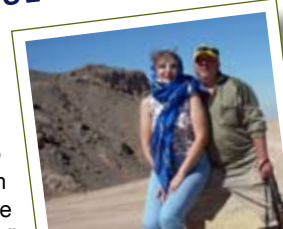
Rural woman learns computing
Beijing
"There are many educated women trying to find a spouse ... it is an alarming social problem."

MADE BY HAND



Handwork for local and global markets
Kolkata
"Here, I can make some saris and sell them. Sometimes I get some work from the boutiques. This is an opportunity for me, a source of income which was not possible back in the village."

BEAUTIFUL FAMILY TIMES



"We have to rest two times a year."
Moscow
"Before I would be more calm and I would get married and stay at home. Nowadays I have to go to work, to make a career, to break myself and make a person of myself. Today there's no time for self-expression in a family."

LEFT BEHIND

"Opportunities for a handful of people are a risk to millions."
Delhi

HUNGER FOR COMMUNITY



Enduring tradition, community identity
St. Petersburg
"I live counting only on myself ... my grandparents' generation I could say they really tried, my granddad was a member of a voluntary citizen patrol. My parents didn't take part in any social programs."

our own solutions

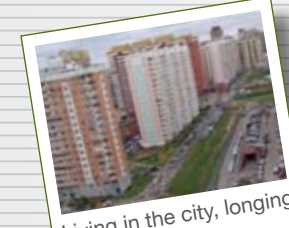
- School for civic society
- Housing for future daughter-in-law
- Public exercise equipment
- Separate apartments, same complex
- Dance troupe as community

PLACES

GEOGRAPHIES OF OPPORTUNITY

"My husband and I will go back to our hometown and live in our own cozy house when we retire from working. But our daughter has already got used to the city life."
Beijing

URBAN ANOMIE



Living in the city, longing for the country
Kolkata
"In the city it's each for himself. Everyone goes out to work. There's always so much loneliness."

MIGRATING WOMEN



Migrant fruitseller gets a new van
Beijing
"There are more women workers in urban low-wage services, while urban jobs for rural men are so limited."

URBAN/RURAL GENDER



Raised expectations for help at home
Beijing
"Many women from rural areas are the victims of traditional views that sons are a better asset for a family than daughters. But in the cities people even have the view that daughters are better than sons."

SUBURBAN LIVES

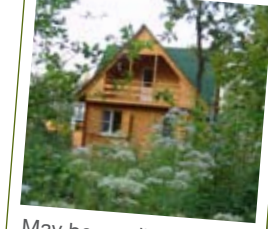


New upscale suburbs surround Asian cities
Beijing
"It's so quiet here, and every family has their own privacy ... and it's a good environment. There are no high-rise buildings ... streets here are wide and the traffic is pretty OK. We have all kinds of activities and a community magazine."

UNEXPECTED ENTREPRENEURS

- Suburban farmers turn land into cash
- IT Brahmins turn caste identity on its head
- Retirees create independent lives away from children
- High school students make it big online
- Vegetable vendors make bags for global market

REBUILDING THE PAST



May be small, must be wooden
Moscow
"Meditating on future changes in my life, I first of all think of moving to a country house"

IDENTITY COMMONS

- Online caste communities
- Afro-Brazilian festival groups
- Housing block online groups
- Fundamentalist churches
- Refugees

LOOKING FOR NATURE



Polluted recreation site
Mumbai
"In one generation the river has been lost: As children we were told not to waste time going to school and join the family business. Now, the river has vanished completely. There is only a pond of scum ..."

MARKETS

no mood to compromise

"We are addicted to the kind of change that has been taking place. There are a lot of new products invading the market every day ... I am part of the marathon where people are racing against time to get the best, even if it means spending a fortune."
Delhi



More new products everyday

OPENING UP WOMEN'S WORK



Girl drummer, strong role model

- Online stock brokers
- Street athletes
- Private school entrepreneurs
- Call center workers
- Online shop owners
- Rock musicians

learning economies

"Now society needs synthesized thinkers. You need to develop yourself in every way. And you have no other choices; you are forced by the development of society."
Shanghai

NONLINEAR VALUE CHAINS

"In earlier times our grandmothers stitched our clothes but now with more nuclear families, local tailors are finding more prominence."
Delhi

BELIEVING IN BRANDS

"I usually go to big supermarkets for shopping in order to avoid buying counterfeit and shoddy products."
Beijing
Western brands offer security

NEW CLASS MARKERS



Rise of VIP service culture

"People now go hiking or trekking ... a lot of these adventure sports ... International holidays, international shopping. Now we can even think of going to Dubai, Malaysia, just to shop."
Bangalore

SUSTAINABLE DREAMS

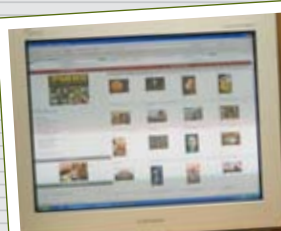
"You would hardly consider sustainable products once you have your own car."
Beijing

SPACE-BUBBLE HOMES

"You need never really go onto the street."
Sao Paolo

PRACTICES

NEW MEDIA PRODUCERS



Russian photographer sells online

- Personal blogs
- Web businesses
- Community Orkut groups
- Online photo albums

media-made women

"... a girl in Hangzhou ... wrote her traveling diary in English on the Internet, which attracts large amounts of fans from all over the world. They all feel that such a girl is so independent and brave."
Beijing



Actress makes a comeback after motherhood
Source: beijingblog.com

NON-TRADITIONAL ROMANCE

"People pay less attention to the traditional moral standards. Extramarital love and one night stands are more and more popular in big cities."
Beijing

Zhang family cost per child:
• School fees: \$42
• Piano & English lessons: \$1400
Source: IFTF, TVF BRIC map 2008

NEW MEDIA COMMONS

"I get all my information from magazines ... what clothes to put on, how celebrities live, how to keep the house, what to cook."
Moscow

PLAYING THE ODDS

"Planning really exists only if the society is stable."
Sichuan



Lottery tickets, a common sight in China

CELL PHONE ECONOMIES

The mobile phone has given rise to a host of new opportunities for ordinary families:
• Side-loading businesses
• Mobile repair shops
• Hacking
• SMS writers
• phone accessories
• mobile advertising

40% of new mobile phone accounts since 2001 have come from BRIC countries.
Source: BBC News, December 2007

FINANCING THE FUTURE

"Before ... if we needed money urgently we would pledge our field or house to the bank. If we didn't repay they would come to confiscate. This used to be a common scene. Now these things don't happen. They don't ask for house papers ... and the interest is very little."
Bangalore

NEW RELIGIOSITY

"While religious values have remained constant, they have now been juxtaposed with a liberal outlook ..."
Delhi



An evangelical church in Russia

TECHNO-OPTIMISM

"The influence of internet on Chinese people is comparable to a new revolution."
Beijing



Adults are learning to use the computer

AMPLIFIED NETWORKS

"I will not stay in the same place as my friend who sells fruit next to me at the market because we are from different parts of the country, but we will stay in touch by using the telephone or sending short text messages."
Beijing



Cross border chatting—China and Eastern Europe

CARS, CARS, CARS

"Who knows, maybe the next time you come to meet me I might be driving around in a car?"
Beijing



Hoping for a car in Shanghai

	SCALE OF 1 TO 10	DIRECTION OF CHANGE
Russia	2.3	Getting worse
India	3.5	Getting better
Brazil	3.5	Getting worse
China	3.5	Holding steady
United States	7.2	Getting worse
United Kingdom	8.4	Getting worse
Singapore	9.5	Holding steady

Source: Transparency International 2007

BRIC FAMILY FORECASTS



PEOPLE

YOUTH DISCOVER “THE NEW ME”

Growing up in a new paradigm of globalization, rising standards of living, and new material goods, today's BRIC youth are inventing new ways of being young. An exuberant exploration of individualism leads them to strike out in search of “the new me”: taking up new body practices such as mountaineering and skateboarding, adopting new kinds of sociality such as roommates, and pioneering life outside their family networks. They rely more on their peers and sense that many elders are ill-equipped to give them the tools they need for success. As one young Chinese man says about his parents' help: “I trust myself more.”

EDUCATION CHANGES WOMEN'S ASPIRATIONS

Greater access to education and a growing entrepreneurialism among BRIC women are disrupting traditional paths to family life. Traditional gender biases in China and India still dictate that husbands should be more educated than wives, and in Beijing, a young college graduate told us that her mother worried for her future marriage eligibility because she had “spent so long” on her education. However, young BRIC women are determined to create new patterns for family, romance, and employment.

“LEFTOVER” KIDS CREATE A YOUTH READINESS GAP

The rapid growth of migrant parents is hollowing out extended families, leaving children in rural areas with elderly grandparents. In China, this is creating a new social class of children—the Chinese media calls them “leftover kids”—who are being raised by those with the least ability to help them navigate a new world. Chinese rural schools turn to overworked, underpaid teachers to “adopt” these children, but leftover kids will face the future more alone than their parents and often with fewer resources for the long arc of their lives.

FAMILY TIME GETS REPACKAGED

The pace and rhythm of BRIC family life are speeding up, reducing informal face-to-face interaction and putting new pressure on family time together. Many BRIC families seek new ways to create what one family calls “beautiful family times.” These may be new rituals like road trips in the new family car, or new ways of viewing old rituals, such as turning traditional religious pilgrimages into more informal family picnics. Leisure time and travel will become increasingly important domains for creating family stability in the face of change.

Implications:

- Human connection will be a prime motivating logic behind adoption of new products and services. New resources will be sought to support, reconnect, and reinvent families.
- BRIC families will look for products and practices for new play and leisure activities, from new sports to more local documentation of travel and fun.

PLACES

UNSTABLE LANDSCAPES FEED A SENSE OF OPEN FUTURES

The flux in built environments in BRIC countries is difficult for most outsiders to comprehend. The most visible changes are in the cities that provide emerging “geographies of opportunity,” where people can make money or a new life. These cities and the spaces between them are undergoing constant construction, creating raw new satellite cities that dwarf average American or European cities. In this landscape, BRIC families face both involuntary and voluntary mobility, moving from village to high-rise, city center to city edge, and industrial suburbs to newly planned rural leisure homes. They are, nearly all of them, imagining their futures in an environment that they know is anything but fixed.

EXTREME SUBURBS REWRITE THE MEANING OF LOCAL

The prosperity of some BRIC families has taken them to upscale enclaves at urban edges, where they can take refuge from the city. Automobiles make the new wealthy suburban lifestyle possible, allowing for a daily range of mobility that far exceeds the experience of previous generations. A Shanghai family finds itself in a patchy high-rise complex on land that they themselves farmed just a few years ago; the surrounding villages are literally paved over to create a new material reality. In Sao Paolo, über-rich families protect themselves against the wilderness of street life with “space bubble” homes; living in high rise apartments, they take elevators to underground parking garages and drive to members-only malls for daily outings into the world.

FAMILIES LOOK FOR NEW WAYS TO CONNECT WITH NATURE

Unstable land-use policies, endemic land grabs, and industrialization have made rural environments anything but “natural,” spewing toxic chemicals and metals across the landscape so that rural families can no longer count on healthy fish from rivers or clean soil for their crops. Meanwhile, urban centers eat away at farmlands around them. For many urban dwellers, a second home in the country is the only way to return to nature. One Moscow family dreams of building a wood cottage in the forest, while a family from St. Petersburg purchases a small plot of land outside the city on which to grow its own fruits and vegetables. The value of nature grows even as it is being destroyed.

Implications:

- New trusted sources of security will become more important as people negotiate unfamiliar urban spaces.
- New tools, services, and products that make it easier to maintain neglected commons—from shared apartments to city streets to the natural landscape—will be needed.
- Families will be looking for ways to bring nature back into their lives through experiences, spaces, or products. But “nature” will vary across BRIC countries.
- The rise of private spaces, whether created by a cell phone, a car, or a portable cookpot, will create new opportunities for customization and personalization.

MARKETS

HUNGER FOR THE “NEW” DRIVES SPENDING

The rapid shift from widespread scarcity to growing abundance (or credit) means that BRIC families are ready to buy, eager to experience, and “in no mood to compromise” when it comes to consumption. A 30-something Delhi man talks frankly of the hyper-consumerism that has pervaded his family's life like a “marathon,” while a Brazilian favela family shows off a new computer with Internet connection, purchased via high-interest installment plans and hot-wired into the electricity grid. New, fashionable, and technological consumer experiences win.

WOMEN RE-IMAGINE “WOMEN'S WORK”

BRIC women are moving into new jobs and new lifestyles. Millions of women who previously had little spending power or access to technology create huge new markets for personal care products, personal electronic technologies, clothing, educational services, and household items. An older woman in Kolkata takes the music classes she always wanted to take as a girl; a Shanghai factory worker learns to use her teenage daughter's computer for online accounting courses and instant messaging with newfound friends. Whether they are stock-market savvy or plugging into the global boutique with hand-made goods, BRIC women are creating new roles for themselves.

TRANSPARENCY RAISES HOPES FOR ACCOUNTABILITY

Corruption shapes every aspect of BRIC family lives, from educating their children to getting medical treatment to starting a small business. But many families point to signs that the rule of law and the increased transparency of information are providing some new relief. Chinese families turn to local courts to solve disputes about workplace injuries and construction incompetence. Meanwhile, the mother of a Russian lawyer worries that her son won't be able to do business if he adheres too closely to the rule of law. In the next decade, BRIC families will begin to push back against traditions of “shady business.”

CONSUMERS LIKE GREEN—BUT THEY LIKE CARS, TOO

Green energy, green food, and green urban planning are all making an impact on BRIC families' daily lives. But new consumer experiences are still top of mind, and the private car is the product of choice. BRIC governments are busy creating markets for alternative energy, organic food, and state-of-the-art mass transportation, but global warming will intensify as BRIC families enjoy the newfound freedom of personal mobility.

Implications:

- BRIC consumers are rapidly becoming sophisticated and demanding.
- Small businesses and hungry entrepreneurs will find it easier to create new markets, designs, and products in their own countries, challenging foreign brands and products but also offering new opportunities for partnership.
- BRIC families will look for ways to achieve sustainability through small daily practices that don't compromise their ability to enjoy their new cars.

PRACTICES

YOUNG PEOPLE REDEFINE ROMANTIC TRADITIONS

Global media, education, longer periods of freedom before marriage, and greater financial autonomy are changing BRIC notions of romance. Chinese and Russian youth are becoming romantically involved at earlier ages, meeting online, and living together before marriage. A Bangalore woman notes that her husband's traditional family wanted a wife who would contribute to the family economy by working outside the home. A young man in Chengdu lives with his college roommates and has multiple casual girlfriends, unbeknownst to his parents. New ideas about gender and new forms of romance go hand in hand.

THE LEARNING ECONOMY HEATS UP

For BRIC families, education and learning are the key to future stability. Russia, India, and China have long traditions of educational aspiration, which are now amplified by new opportunities and risks. In post-socialist Russia and China, new private educational institutions offer the wealthy access to even faster social mobility, and middle-class families are spending every penny on learning products and services for children and adults alike. One Beijing rural family spends the equivalent of several months' salary on piano and English lessons for their young daughter. Markets for learning products and services will abound.

VIP CULTURE EXPLODES IN THE BRIC MARKETPLACE

Increasing socioeconomic stratification across BRIC countries is fueling the growth of a VIP culture, whether in retail, transportation, fashion, or technology. Elite BRIC families are looking for ways to distinguish themselves from others, and to experience the best the world market has to offer. Luxury is a new market category—different but growing in every BRIC country.

FAMILY HEALTH MEETS ENVIRONMENTALISM

Even as BRIC families adopt unsustainable products and practices, they take note of the environmental degradation around them. Many BRIC families have seen their natural landscapes devolve alarmingly during their lifetimes. In Russia and China in particular, families are wary of toxic food and household items. They protect themselves with strategies like buying green-certified foods and monitoring industrial pollution online. Many BRIC families will become more worried and more discerning about the things they buy over the next decade.

Implications:

- Products and services with educational value for all ages of BRIC family members will win.
- Families will look for luxury and special treatment in products and services.
- Indigenous environmental movements rooted in family health will make new demands on the market.

TOOLS

EXPERIMENTS WITH MOBILITY AND IDENTITY PROLIFERATE

Just as they have in the West, the Internet and mobile phone technology are driving experimentation with identity and mobility in the BRIC countries. With China at the forefront, hundreds of millions of BRIC family members are joining social networking sites, creating new relationships with strangers, and posting their own creative work in online forums. Mobile phones allow more physical mobility for young women in particular, provide a first-time experience of private virtual communication as well. A young Beijing woman blogs in English and Chinese. A Moscow photographer starts his own business online. Watch for the growth of distinctive online BRIC cultures.

SPECULATION GROWS

BRIC families are dreaming big. They seek to catapult themselves into financial security through new tools like lotteries and stock markets. Surrounded by people who seem to be getting rich overnight through skillful manipulation of volatile conditions, many are afraid of getting left behind. In Russia, China, and India, property values have skyrocketed in the past decade, creating real estate bubbles and infusing family decisions about property with a sense of anguish over timing. A Beijing family waits to find out what the city will do with their traditional courtyard in a dilapidated section of the city and worries that neighbors will make better deals with developers. The next decade is likely to bring a rollercoaster in BRIC family fortunes, but for now, BRIC families are sharpening their speculative skills.

FUTURE PROOFING THROUGH INSURANCE

Constant change means that BRIC families are looking for ways to guarantee a measure of security in the future. Although still serving only a small portion of the population, private insurance plans—including life insurance, health insurance, private pensions, and auto insurance—are all growing at impressive rates across the BRIC markets. Governments, banks, and NGOs are developing microinsurance plans for those with lowest income. These kinds of products will develop quickly, each within its unique regulatory environment.

Implications:

- BRIC families will seek products and services that can provide a sense of consistency and durability in the midst of social instability.
- Given that BRIC families are likely to experience financial setbacks as their rapidly developing economies go through growing pains, businesses should be prepared for erratic growth in these markets.
- Social media will become mainstream in the next decade across BRIC countries, and BRIC families will be at the forefront in creating new uses for these tools.

A Map of Local Lives in a Global Economy



The BRIC countries—Brazil, Russia, India, and China—are reshaping the world as we know it.



They are emerging as the engines of global economic growth in the early 21st century, and their people are experiencing the best and worst that globalization has to offer. Entire landscapes disappear and are rebuilt. Millions of agriculturalists enter the cash economy. Hundreds of millions get connected with broadband internet and mobile phones. As BRIC families adapt to this heady swirl of new opportunities and dilemmas, the choices they make will drive global cultural change.

This map is their own view of a future they themselves are creating.

Inspired by their resilience, we at Institute for the Future (IFTF) set out to understand more about their visions and their strategies for ballast amidst turbulence. We asked more than 40 families from urban, rural, and suburban BRIC locations to tell us what they look forward to in the next decade, what worries them, and how they are building new kinds of alliances to maintain their stability.

With photographs and diaries, they pinpointed many familiar trends: the vast increase in opportunities for women, the dispersion of families in search of employment and urban alienation, to name a few. They shared important and surprising personal details of their lives. And they also gave us insight into five big drivers of change that help us see the larger patterns across all four countries.

We invite you to tour the world as these ordinary families see it. Look through their eyes to understand how they will make decisions about work, education, and leisure over the next ten years. Use their own language and images to anticipate how those decisions will shape where they live and what they buy. Imagine how these patterns will change the lives of families, communities and businesses in other parts of the world—whether through new market opportunities or new social and environmental challenges. Use their voices to probe your own future.

