

THE VIBRANT FRINGES

Spotting opportunities beyond the mainstream

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A CHANGING WORLD

The story of the Fringe is the perfect example of how people and initiatives relegated to “the margins” are often the source of disruptive innovation, breakthrough ideas and the bellwether of emerging trends and things to come. In a broader sense, global demographics are shifting, identity is being redefined, the definition of “mainstream” is in unprecedented flux, and the people we consider to be “marginalized” will twist and shift according to context, culture, and interactions.

The term “mainstream”, a relic of the mass marketing era, has essentially lost its meaning. The traditional family – its structure, attitudes, and challenges – has evolved to a point where it’s impossible to describe with a single definition or description. In fact, many consider the term obsolete. With the global internet now accessible to nearly two-thirds of the world’s population,¹ previously marginalized and underserved segments, interests, preferences, and populations can connect, develop, and flourish by bypassing traditional gatekeepers, and opening a new panoply of opportunity.

- National censuses are showing that people of European origin who were previously a clear majority across North America are no longer, and that populations across Europe and Australasia are becoming more diverse.

- In both the US and the UK, the fastest growing ethnic group is those who are sometimes termed “mixed race” – a classification that itself conceals a huge range of diversity.
- The World Health Organization estimates that 1.3 billion people experience significant disability² – around one in six of the world’s total population. Although there is still stigma and discrimination, the world is gradually learning to acknowledge and accommodate these people.

Beyond the demographic shifts, attitudes and lived experiences are changing. Dualities and segmentations of the past require continuous updating and ongoing new thinking. Experiences have become a dynamic kaleidoscope of identity and while more dominant aspects are front and center of a given interaction, all of oneself hovers close behind. None of us belong solely to one group and our connection to other identities will determine how we navigate within and across our boundaries.

THERE’S FUTURE AT THE FRINGE

Every year in August, the streets of Edinburgh come alive for three weeks to celebrate the Edinburgh International Festival and the Edinburgh Festival Fringe.

The Edinburgh International Festival was originally created in 1947 to celebrate European cultural life following the devastations of WWII. Performers required a special invitation, but eight radical theatre groups turned up uninvited to perform in smaller alternative venues around the fringes of the main event. This disruptive group unknowingly launched a spontaneous artistic movement that became known as the

Edinburgh Festival Fringe – or more commonly – “the Fringe”. Today, this open-access festival provides opportunities for more than 50,000 new, unknown performers and attracts some 2.5 million audience members. It has become a feeder event for new talent and stories, the place to be to get ahead of emerging acts and trends and has launched such well-known works as *‘Six the Musical’* and Phoebe Waller-Bridge’s *‘Fleabag’*. The Fringe has become a world leading celebration of arts and culture, second only to the Olympics and FIFA World Cup for global ticketed event sales.

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THE VIBRANT FRINGES

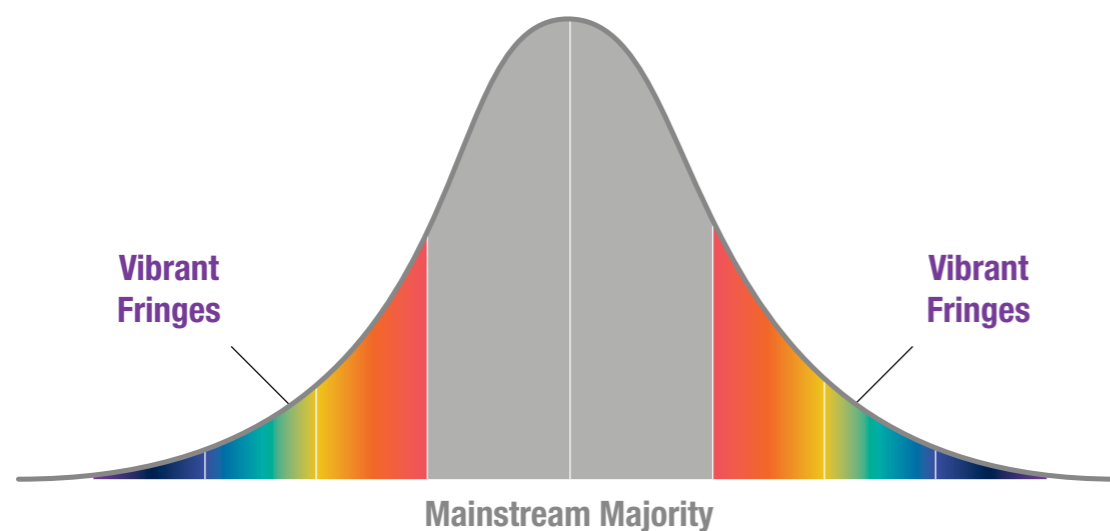
In the context of marketing, “fringes” – niche or unconventional segments of the market that exist outside the traditional consumer base – have come to represent smaller opportunities and distractions from the needs of the broader market.

At Ipsos, however, we believe that by engaging with those who sit on the fringes of defined groups, we can uncover valuable insights about our deepest current and future needs. Engaging within these colorful spaces – **Vibrant Fringes** – with understanding and empathy can help organizations to get ahead of and navigate the desires and demands of tomorrow. Nurturing fringe relationships can reveal incremental niche opportunities and can also unveil speculative ideas from those whose lived experience has been limited by the status quo and whose solutions may very well be beneficial to all.

Defining a Vibrant Fringe opportunity requires a dynamic process that recognizes intersectional lived experiences. Many factors including an individual’s life stage, status, or cultural context could shift them from being on the probability “tail” in one situation and squarely in the middle in another.

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Figure 1: Redefining the spectrum



ETHNOGRAPHY TELLS THE STORY

In a recent ethnographic study, we dug into the intersectional lived experiences of a range of individuals and explored how they might affect various beliefs and behaviors.

The ethnography revealed several things:

- Individuals contain multiple identities and the experiences they have from a given perspective often leaves a formative impression that impacts how they make decisions and what they pay attention to in other situations.
- The emerging emphasis on individuality has created a heightened sensitivity for authenticity and consistency. The freedom to be a unique individual, to be heard and to not be judged is considered critical and is good not only for the individual but also for the whole – be that family, organization, or community.

- People today operate in multiple realms, within which their “primary” identity can shift. They are willing to represent whatever aspect of themselves is most in need of focus or attention given the context and immediate need.

“I think it was based on what needed to be shouted the loudest. I’d be in spaces that weren’t queer and so it was very important to me that people knew that I was queer, that there are queer people in the space.”



BASHAR

Identifies as:
Queer, Iraqi, Chaldean

“I am Asian. I’m American. I’m a woman. In different moments I want to express myself a little bit differently. Our consumers also have multiple facets of themselves they want to express.”



ALICE YU

VP Consumer Insights
Tapestry

- Our respondents were willing to develop workarounds and alternative solutions when an aspect of their identity created specific needs that were not addressed by available offerings. But there was a strong sense of loyalty to any brand or business that addressed it first with viable solutions that reflected genuine understanding and empathy.
- Brands and businesses are expected to play a bigger role in ensuring all stakeholders are recognized and included. Clear, consistent, inclusive intentions were seen, appreciated, and rewarded with loyalty. What felt disingenuous or manipulative was easily recognized and created the opposite effect.

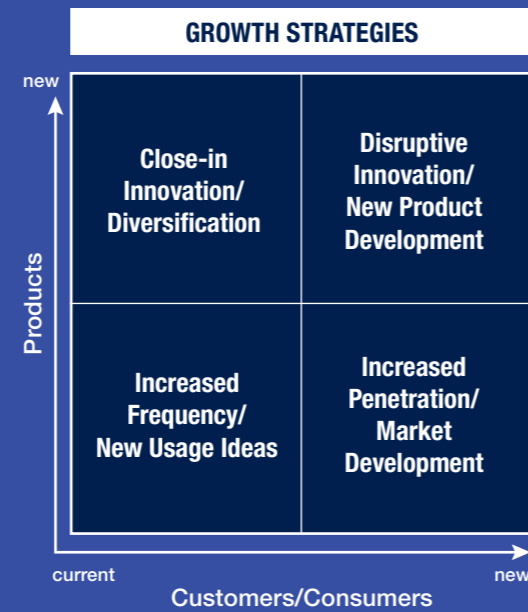


THE FRINGE: OPPORTUNITY CANVAS

01 THE GOAL

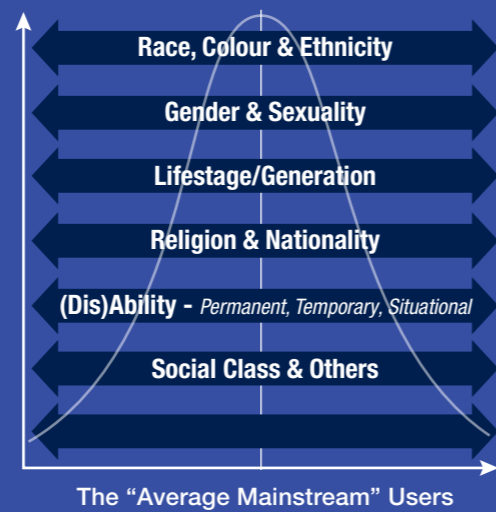
What are you seeking to achieve?

New market, innovation, fresh perspective, inspiration?



02 DEFINE INTERSECTIONAL DIMENSIONS

Consider consumer, culture, context and category



03

EXPLORATION OF FRINGE OPPORTUNITIES

Who do we need to study to meet the strategic goal?

04 EMPATHETIC UNDERSTANDING OF TENSIONS

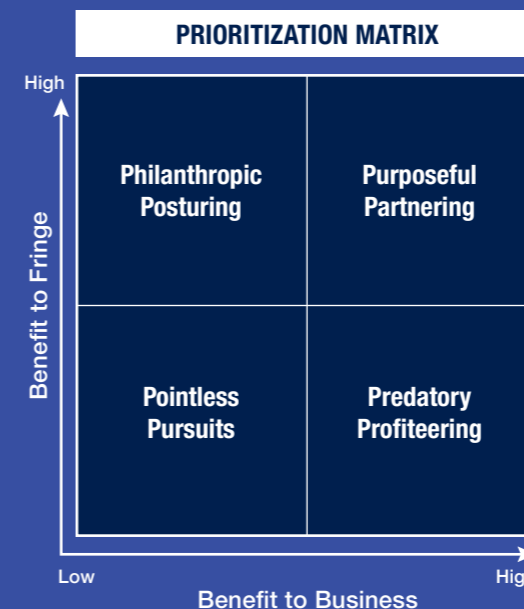
What is the meaningful insight/tensions/problems faced?



05 PRIORITIZING THE PATH

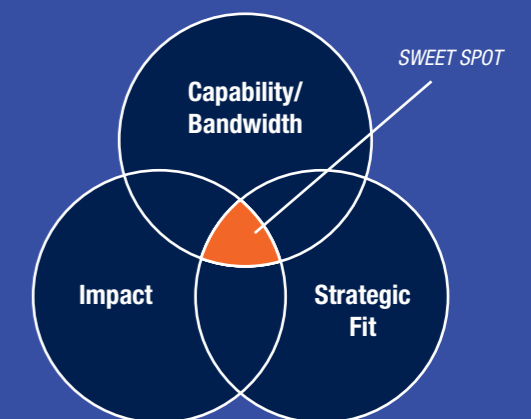
What are you doing and why are you doing it?

What's the right path for your business?



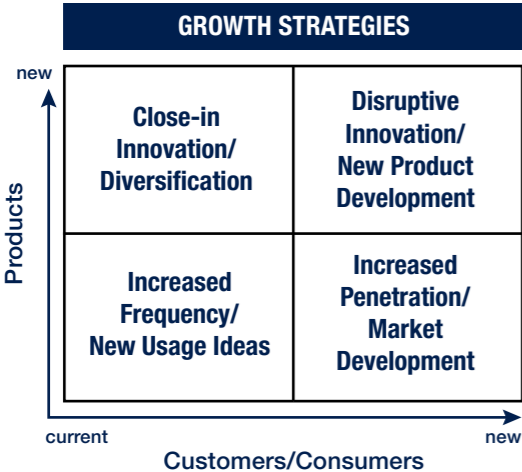
06 THE ENDGAME

How will this help us to achieve our business objective?



UNLEASHING FRINGE POTENTIAL

These honest and direct conversations revealed opportunities to be found by listening to and addressing individuals in the Vibrant Fringes and highlighted the possible consequences of doing it poorly or not doing it at all. Identifying individuals as they move in and out of mainstream and fringe is a dynamic process and requires constant attention. The following six step model can help to identify the right opportunities for a business or brand and to mitigate risks.



1. **Setting the strategic goal.** Agreeing on strategic objectives upfront will help to focus and set appropriate priorities moving forward, allowing teams to make decisions based on consistent direction. Attention to the Vibrant Fringe can open opportunities for deeper penetration, increased frequency or establishing new markets, but making eventual target decisions as well as innovation development and communication choices will be easier if growth objectives are clear at the start.

2. **Define the appropriate intersectional dimensions.** “Othering” occurs in different ways for different reasons. Brands must consider the nature of their products, consumer, cultural influences and the dynamics of context and situation to locate the most common and the strongest dimensions to consider when assessing fringe opportunities. To address this, Ipsos suggests a process to design, recruit, and analyze using a broader number of lenses than those typically applied. We found the sweet spot in six dimensions that provide a more holistic view of how one experiences the various situations brands live in and influence. But the number of dimensions is not finite and may differ in number and nature depending on the context

Figure 2: Cardinal dimensions and multiple intersectionalities

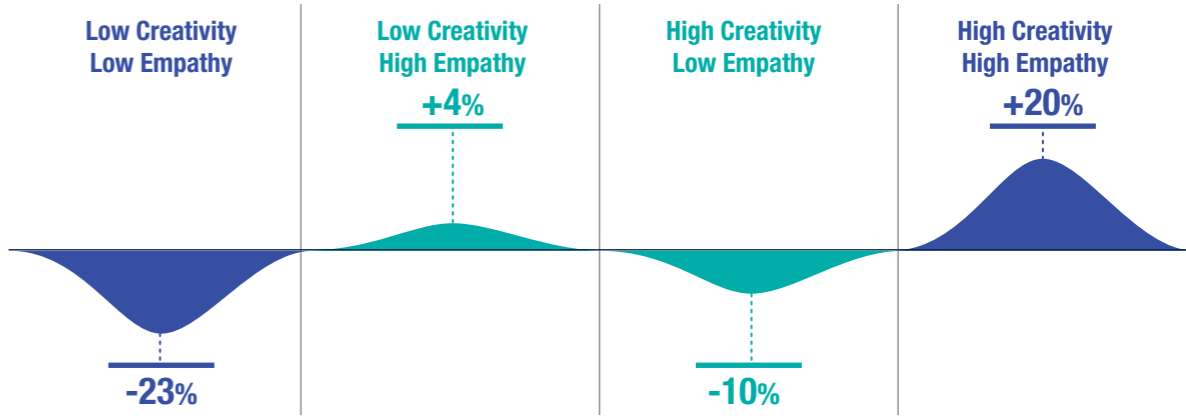


or category of the business objectives. In our research, we looked at the dynamic exchange between race/ethnicity, gender/sexuality, life stage/generation, religion/nationality, ability/disability, and social class. Considering the cross section of two or more of these six dimensions has revealed unexpected intersectionalities and layers.

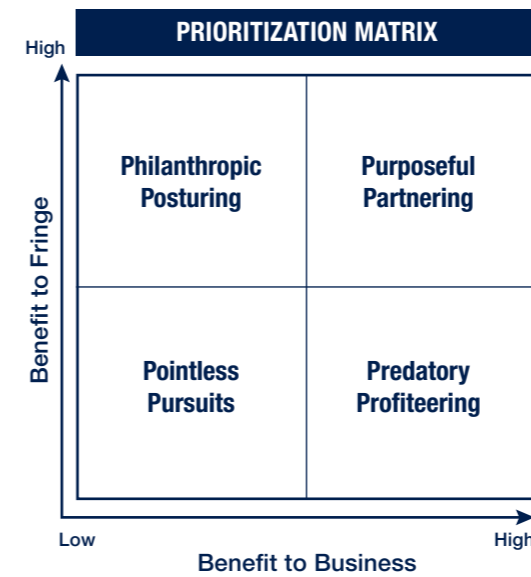
- 3. **Explore the fringe opportunities and decide where to focus.** Examining the various dimensions and intersections will expose possibilities and opportunities that you may not have considered. Align these opportunities with brand objectives and determine where and how to focus your attention and resources to meet your goals.
- 4. **Employ empathy to understand specific tensions.** See and hear the world through their specific lens and practice deep listening to better understand their challenges and tensions. Deep listening during this phase includes starting with observation, suspending your current beliefs and preferences, and having a consumer-led conversation. Brands often encounter difficulties in identifying opportunities among the Vibrant Fringes due to unintended biases and high-level assumptions. These biases, stemming from ingrained or limited perspectives, can create blind spots that hinder the understanding of the needs and desires of fringe communities. Successfully reaching and connecting with fringes often requires a deep understanding of their needs, behaviors, preferences, and communication channels. At this stage, genuine empathy is key and can lead to improved impact in the long term. An Ipsos global ad test analysis demonstrates that adding empathy to creative executions can undo the negative impact of low creativity or boost a highly creative execution significantly.

The research demonstrated how many fringe communities, especially when intersectionality is considered, often do not feel seen or heard. Approaching them with openness and empathy will be noticed, appreciated, and rewarded with loyalty.

Figure 3: % difference vs. average performance on creative effect index

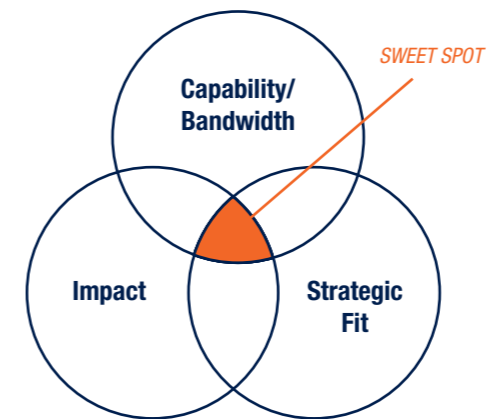


Source: Ipsos Global Ad Testing Meta-Analysis (n=1,734 cases)
Ipsos Creative Excellence | MISFITS How creativity in advertising sparks brand growth



5. **Prioritize purposeful partnering.** The beauty of shifting focus is the potential for purposeful partnering i.e., a state that is mutually beneficial to the previously overlooked audience at the fringes as well as the business. Diversity and inclusion efforts are one example of a Vibrant Fringe approach, but these efforts are sometimes limited by outdated definitions of monolithic groups and are often categorized as “nice to do” with diminished strategic value. Consequently, they lose priority in the face of day-to-day immediate business challenges. DEI (Diversity, Equity, and Inclusion) efforts continue to be

one of the most challenging initiatives for most brands and organizations – often falling short on authenticity, brand coherence, cultural sensitivity, and transparency. But an empathetic focus on a strategic Vibrant Fringe target will benefit both the fringe and the business such that purposeful partnering can occur.



6. **Iterate towards a realistic endgame.** Be realistic in choosing the initiatives that have the greatest potential for success while also pushing your team for disruptive, meaningful growth. Honestly assessing your organization’s current capability, bandwidth, and passion for these types of strategic initiatives will determine the most effective way to move forward and encourage continued engagement for the long term.

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THE BUSINESS CASE

Including Vibrant Fringes is not just a feel-good approach – but in fact very good for business with the potential to unlock new opportunities and innovations that would otherwise be excluded from the scope. Listening to voices from the fringes can allow marketers to address an underserved market and uncover opportunities for growth. Here are some of the specific ways in which including Vibrant Fringes can reinvigorate, galvanize, and step up your business growth and innovation:

- **Providing fresh perspectives and new voices:** Those who live on the Vibrant Fringes often possess a unique perspective due to their experiences outside the mainstream. Their distinct

vantage point allows them to challenge and question prevailing norms, offering fresh insights and alternative viewpoints. Engaging with these audiences enables a brand to embrace this fresh perspective and tap into a wealth of untapped creativity.

- **Build brand equity:** Companies that prioritize diversity and inclusion are often viewed more positively by customers. By including perspectives from historically underrepresented targets in their marketing efforts, companies can demonstrate their commitment to diversity and build brand equity among a wide range of customers.

- **Vibrant innovation:** Typically, users on the tails of the bell curve have a unique set of needs, whereby they need less or more of something, and are often ignored by marketing. These could include individuals who are differently abled, or have a specific allergy, ailment, or those who fall outside of the margins of a

typical marketing brief. Understanding the unique needs and preferences of these ignored groups on the fringes can help companies develop products that better meet the needs of not just the diverse customer base but also the mass in the middle.



FENTY BEAUTY DELIVERED 'BEAUTY FOR ALL'

Rihanna, the founder of *Fenty Beauty*, was very clear that absolutely no one was to be excluded. Her vision of “Beauty for All” soon became the brand’s marketing mission.

Fenty Beauty first launched in 2017 with 40 beautiful shades of foundation and today it has even more. It was the first time underrepresented, underserved women and cultures were featured in a global prestige beauty campaign.

With an **annual revenue of \$582 million dollars** and **valued at \$2.8 billion by Forbes**, *Fenty Beauty* has not only become the most successful celebrity beauty brand in the world but has also demonstrated that there is fortune on the fringes.



PLANT MILK, A VIABLE ALTERNATIVE IN EVERY CUP

Oat milk was invented in 1994 in Sweden by *Oatly*’s founders, brothers Rickard and Bjorn Oeste, who were researching an alternative to cow’s milk for people with lactose intolerance. Today oat, almond, rice, and other plant milks can be found in a range of popular beverages at your favorite café chains and the market is only slated for further growth with the rise of veganism.



OXO GOOD GRIP

Sam Farber founded *OXO*, a company selling kitchen tools, when he saw his wife Betsey having trouble holding her peeler due to arthritis. Sam saw an opportunity to create more thoughtful cooking tools that would benefit all people (with or without arthritis).

- **Risk avoidance:** Companies that fail to prioritize inclusion, those who treat it as mere tokenism, or appear inauthentic while addressing their needs can face significant backlash from customers and

stakeholders. By including diverse perspectives, companies can avoid controversy and demonstrate that they are committed to understanding the needs and preferences of all customers.



HIP HOP – ANOTHER FRINGE SUCCESS STORY

As we celebrate the 50th anniversary of Hip Hop it would be remiss not to highlight it as another prime example of what happens when the Vibrant Fringes come alive. What started as a local movement in New York in the 70s, has blossomed into a multibillion-dollar industry that crosses industries and categories including music, fashion, technology, art, entertainment, education, politics, media and more. These young artists were delegated to the fringe and left to their own devices in many ways when dwindling economics and shifting demographics led to abandoned segregated communities. They created their own means of expression and grassroots outlets for delivering them. What was once an emerging trend has now become a global phenomenon influencing business, art, and culture around the globe.

KEY TAKEAWAYS

1. The world is changing. Strategies for future success must acknowledge and address shifting demographics and emerging attitudes and behaviors.
2. People on the Vibrant Fringes have the unique ability to expose and highlight emerging needs and incremental growth opportunities.
3. Deep listening to people within the Vibrant Fringes provides an empathetic perspective into their genuine experience, needs and tensions.
4. Companies that get ahead of the changes will be able to provide the right product for a dynamic consumer and customer base and will be able to communicate genuinely, creating loyal brand followers.

REFERENCES

1. Petrosyan, A. (2023) "Internet penetration rate worldwide 2023, by region". Statista. 28 November, 2023. <https://www.statista.com/statistics/269329/penetration-rate-of-the-internet-by-region/>
2. World Health Organization. (2023) "Disability". World Health Organization. 7 March, 2023. <https://www.who.int/news-room/fact-sheets/detail/disability-and-health>

FURTHER WATCHING

1. The Vibrant Fringes: Human Stories Driving the Business Case for Inclusion <https://www.ipsos.com/en-us/webinar-vibrant-fringes-human-stories-driving-business-case-inclusion>
2. 75 years of the Edinburgh Fringe and the history of the festival <https://www.timeout.com/edinburgh/things-to-do/75-years-history-of-the-edinburgh-fringe>
3. Breaking Barriers: Fenty Beauty's Marketing Strategy Case Study <https://www.brandvm.com/post/fenty-beautys-marketing>
4. Behind the Design: OXO's Iconic Good Grips Handles <https://www.oxo.com/blog/behind-the-scenes/behind-design-oxos-iconic-good-grips-handles>
5. How 50 Years Of Hip-Hop Provided 50 Years Of Marketing Game <https://www.forbes.com/sites/marcuscollins/2023/08/11/how-50-years-of-hip-hop-provided-50-years-of-marketing-game/?sh=3e91055b1b93>

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