



Decoding the DNA of the ‘Sovereign Single’

April 2026



BRAND GENETICS

Is your brand **patronizing**
the fastest-growing
global household?

Or worse, are you
ignoring them altogether?

Expected



Actual



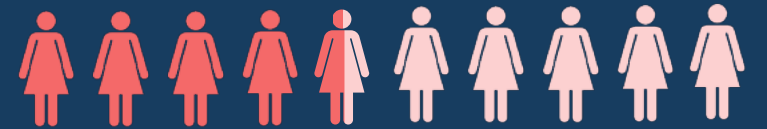
100M+

more singles globally
than expected since 2017¹



30%

of China will be living in
single-person households
by 2030²



45%

US women between 25-44 will be
childless and single by 2030³

“

All over the world people are more likely to go solo, not even want to get married, have relationships or have children.

– John Gottman Ph.D | Professor Emeritus of Psychology, Author, Founder of The Love Lab

‘Single’ is no longer just a phase.

It’s a new **operating model** for life.

A mass cultural **shift** crossing gender, generations and continents.

It’s rewriting the rules of what it means to be single.



Who is the Sovereign Single?

Sovereign sov·er·eign
Single sin·gle

a supreme ruler or an independent with self-governing authority.

an individual not currently in a committed romantic relationship, marriage or civil union.

LIFESTAGE

Legacy Single Principle:

**Singlehood is a transitory
"Pre-Family" stage (18–28)**

HOUSEHOLD ROLE

Legacy Single Principle:

**The single person
'gets by'**

ECONOMIC STATUS

Legacy Single Principle:

**Single income =
Low spending power**

CONNECTIVITY

Legacy Single Principle:

**Singlehood equals
isolation (no partner, no
support)**

Sovereign Re-Code:

Proudly solo.

Prime-Age (25–45) with a
high-wealth subset of Silver
Sovereigns (55+).

They aren't "pre-anything",
they have arrived.

Sovereign Re-Code:

Sole Executive.

They are the exclusive
decision-maker.

No "secondary influencer" or
partner to dilute intent and
they are not waiting for them.

Sovereign Re-Code:

**Zero-dependent
wealth.**

Disposable per-capita spend is
entirely their own.

Euromonitor found single person
households spend 87% more per
capita than large households.

Sovereign Re-Code:

Networked.

They are influenced by the Group
Chat and their Chosen Family.

They are living solo but are
hyper-connected.

As social norms evolve, singles are increasingly **choosing not to compromise**



“

*The goal is to **become a whole person on their own** so any relationship is a partnership of two complete people, **not just two halves, trying to complete the puzzle.***

— Pan Wang, Associate Professor of Chinese & Asian Studies



“

*People now have such a **strong sense of their identity** that they're **not willing to sacrifice anything for someone else***

— Holly Friend, Futurist & Cultural Strategist



“

*Divorcees in their 40s, 50s, 60s now have **more money, more time, more self-knowledge...** you don't have to look for a partner for a life project*

— Carol Tilkian, Psychoanalyst & Relationship Researcher

Yet brands are **compromising profits** by not understanding the DNA of the Sovereign Single

“

*Singles' Day online shopping sales in 2023 were estimated to be **\$156.4 billion***

– TatlerAsia



“

***Two-thirds** of consumers struggle to name even one brand that they feel **truly** understands single people*

– MediaCat



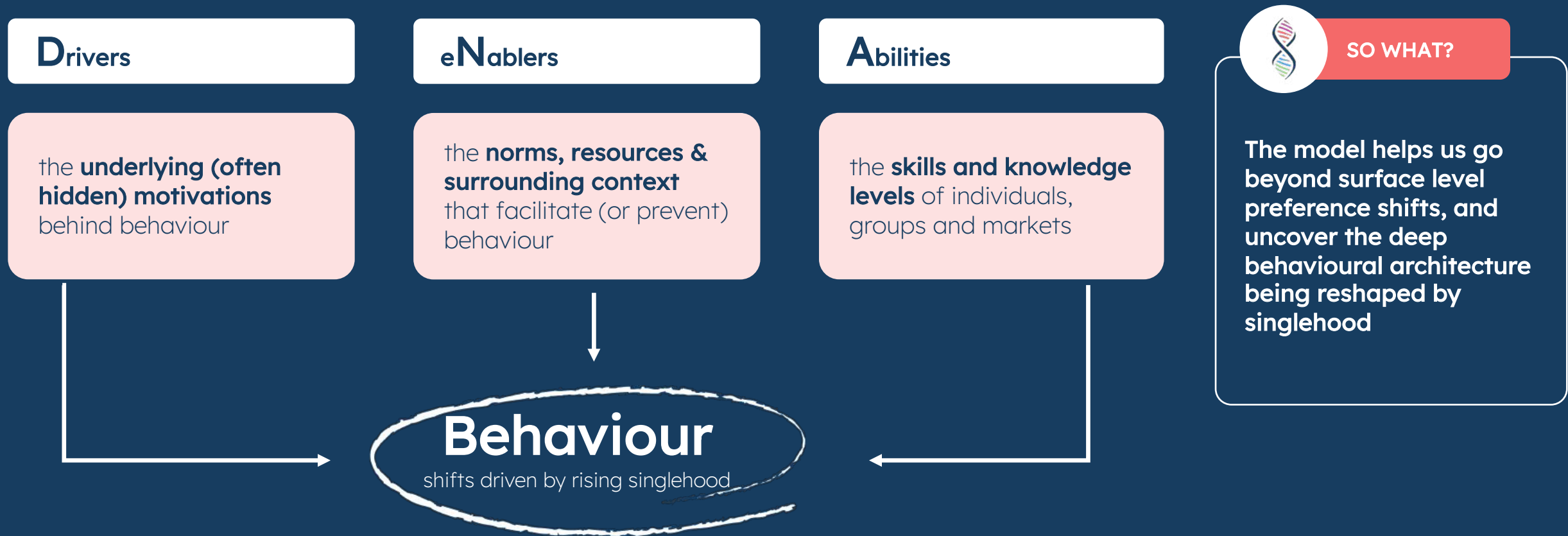
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*Only **6%** of marketers surveyed consider single-person households to be **strategically important***

– WARC Marketer's Toolkit



Our **DNA model** is a science backed, evidence-based model that reveals how the drivers, enablers and abilities **shape behaviour***



**Research was conducted across 4 markets (UK, US, Brazil & China) with a series of consumer and expert interviews, alongside extensive desk research and utilisation of Brand Genetics' proprietary AI tool (LEXI), designed to decode hidden motivations using psychological frameworks*

It enables us to **decode** the Sovereign Single, their behaviour and how brands can meaningfully connect

D Drivers

Identity: I want to live an uncompromised life just for me

Empowerment: I want to feel fully self-sufficient & capable

Nurturance: I want to feel cared for & comforted

Belonging: I want to feel seen, accepted and part of a community

N eNablers

+

Tech: AI, smart tech & platforms help offload tasks & act as safe 'third spaces'

Time surplus: Singles enjoy absolute autonomy over their calendars

-

Lack of support: External emotional and tactile support is reduced

Social stigma: Norms & spaces, from recipes to restaurants, make solo living awkward

A Abilities

+

Operational efficiency: Acting as a 'committee of one' accelerates decisions

Self-knowledge: Singles are more in touch with exactly what they like and want

-

Individual bandwidth: Mental & physical ability is reduced as a sole operator

Social fatigue: The effort required to maintain connections can be tiring

These components are impacting behaviour – the operating conditions – of the Sovereign Single. **Are you aware how?**

Four behavioural shifts and JTBD for the Sovereign Single



HOW THEY SPEND

Zero-compromise Consumption

Spending to validate the self and indulge without shame

Driver: Identity

Ability (+): Self knowledge

eNabler (-): Social stigma



JTBD

Help me legitimise my high standards



HOW THEY OPERATE

Scaffolding Independence

Using tech, tools, and UX as structural support

Driver: Empowerment

Ability (+): Operational efficiency

Ability (-): Low bandwidth



JTBD

Help me seamlessly master the logistics of solo life



HOW THEY REST

Engineering Comfort

Curating the sanctuary to self-soothe

Driver: Nurturance

eNabler (+): Time surplus

eNabler (-): Lack of support



JTBD

Help me embrace the comfort of my own life



HOW THEY CONNECT

Unbundling Intimacy

Redistributing emotional needs across a trusted network

Driver: Belonging

Ability (-): Social fatigue

eNabler (+): Tech



JTBD

Help me experience everyday companionship

A person with curly hair is holding a credit card in their right hand and a tablet in their left hand. The image is overlaid with a semi-transparent blue filter.

01

Zero-Compromise Consumption

Spending to validate the self and indulge without shame

Singles are unlocking their 'partner budget' and choosing to **invest in themselves instead**



*“We are increasingly **unwilling to settle for something that makes our lives worse.** If you made it this long and haven't settled for the wrong person yet, **I don't think you're going to do it at all.**”*

- Shani Silver, Author & Columnist

Singles are rewriting the rule that indulgences must be gifted from a partner or deemed 'a reward'

An exaggerated manifestation of the rise in individualism, they refuse to wait for external validation. They are actively self-gifting – seeking out highly individualized, VIP indulgences that feel truly 'worth it'.

57%

of consumers plan to shop for themselves during the holidays, with self-spend up 20% YoY

62%

of US beauty buyers want hyper-personalized products; **28%** are willing to pay a premium for them

Consumer JTBD #1: Help me legitimise my high standards

“

I'd rather pay the price of getting exactly what I want versus letting it go...

*It feels like **an act of self-care, an expensive act of self-care.** It's just my choices for me.*

*So **I don't feel much shame** a lot of time in making these purchases.*

- Female, 26, UK



DNA Analysis

While Sovereign Singles know what they want and refuse to settle, they must navigate a stigma that attaches guilt to solo indulgence

Driver: Identity

Ability (+): Self knowledge

eNabler (-): Social stigma

From:

Solo consumption as the budget, sad option or 'guilty pleasure'

To:

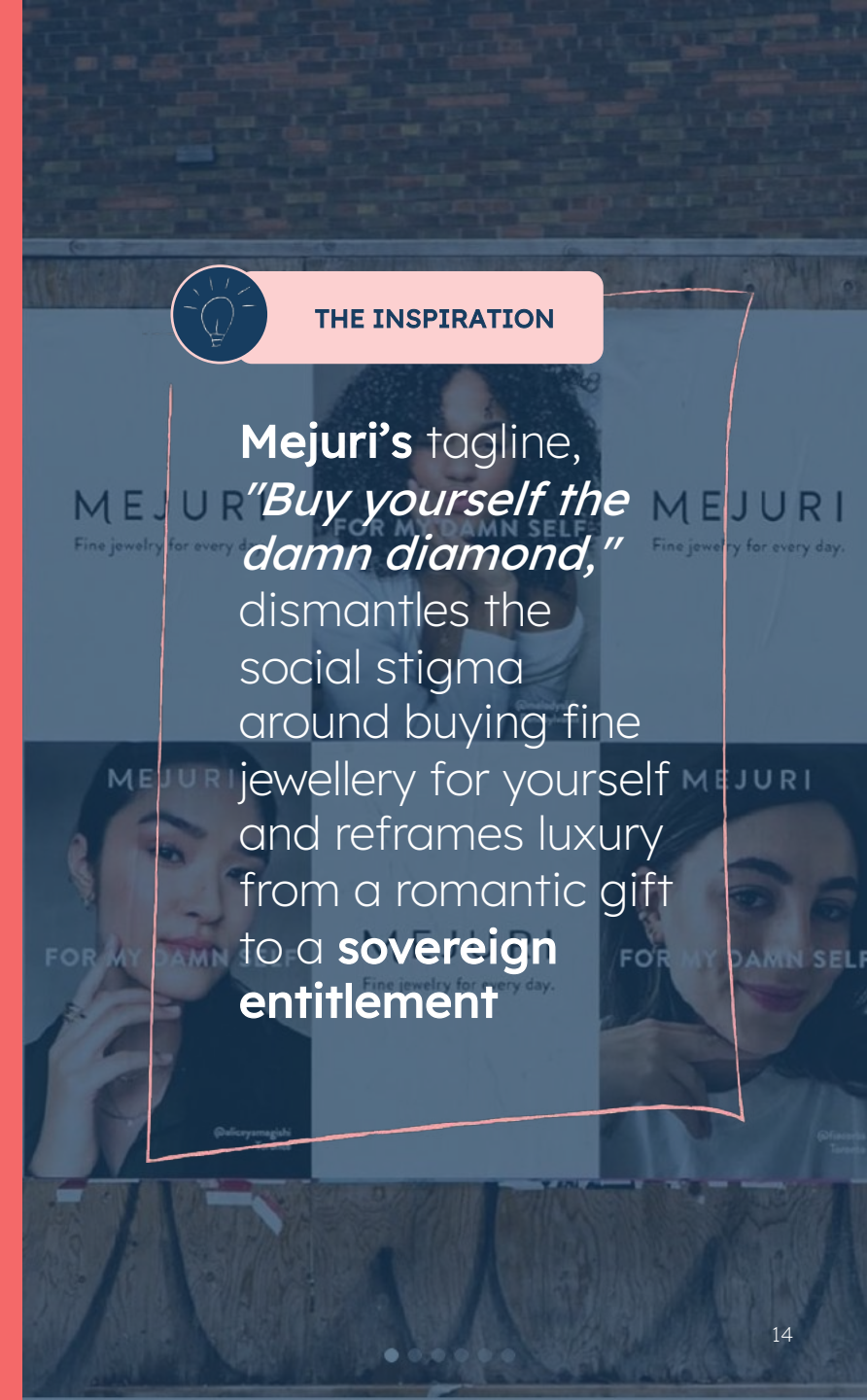
Celebrating the identity of the solo lifestyle

Legitimise self-gifting

Dismantle social stigma around gifting, using messaging that encourages & supports VIP, guilt-free spending

Validate self-knowledge

Singles refuse to settle for generic 'dupes'. Offer highly curated, uncompromised products that meet their exacting standards



A person in a red and black plaid shirt and dark pants is crouching in a forest. To their right is a green A-frame tent. A large green backpack with a rolled-up rug on top sits on the ground next to the tent. In the foreground, there is a small fire pit with logs and a kettle. The background is a dense forest of tall trees.

02

Scaffolding Independence

Using tech, tools and UX as structural support

Singles are **seeking structure & support** in how they manage the demands of solo life



*“Nowadays, the platform economy is thriving, so apps can solve everything. Like Red Note and Taobao in China. These are very useful resources that people can resort to **facilitate their living alone**. They don't have to ask a partner for help with these daily tasks. **Everything can be done on their own.**”*

- Pan Wang, Associate Professor of Chinese & Asian Studies

Being the CEO, CFO, and COO of your own life is exhausting

Single consumers want to feel capable & independent, but their bandwidth is limited. They're increasingly turning to platforms, services, and tools that lighten the load while keeping them in control.

11%

Faster revenue growth for companies in the Subscription Economy Index than the S&P 500

8 in 10

Gen Z/Millennials use subscription services to explore new products, outsourcing their choice fatigue

JTBD #2: Help me seamlessly master the logistics of solo life

“

*The home space can be **tricky to navigate if you're on your own**. When I think of IKEA or furniture, home improvement, home care, it would be so useful to have an indication like how many people needed to build it – **because it's kind of up to you to figure it out**.*

*I tried building something the other day and **I needed help with it** and it was annoying.*

- Male, 31, UK



DNA Analysis

Sovereign Singles move with the agility of a 'committee of one', but doing it all alone takes its toll

Driver: Empowerment

Ability (+): Frictionless decision-making

Ability (-): Low bandwidth

From:

Managing the mess of solo life

To:

Scaffolding independence

Be the co-pilot

Give them the tools they need to conquer it on their own. Design physical products for one pair of hands and offer seamless cognitive offloading.

Validate capability

Acknowledge them as a highly capable CEO. Shift the narrative from pitying or needing to be rescued to supporting independence.



THE INSPIRATION

Bio-hacking tools like **Zoe** remove the guesswork of adulting, speaking less about 'eating well' and more about 'managing your biology', offering consumers a superpower supported by data

A woman with blonde hair styled in large, red and white curlers is shown in profile, looking at a laptop screen. The laptop screen displays the Netflix logo. The background is a bedroom with floral wallpaper and a lamp. The entire image has a blue tint.

03

Engineering Comfort

Curating the sanctuary to self-soothe

Without a partner to provide passive comfort, singles are **outsourcing emotional regulation**

The performative ‘Girl Boss’ era of the 2010s is over – now, singles are allowing themselves to be vulnerable

Biologically wired for comfort, single consumers are rejecting hustle culture cliché and constant self-optimization. Instead, they prioritize self-soothing, sensory comfort & radical self-acceptance.



*“If you're feeling really rubbish and you're alone... **you need to have a support...** so basically your teddy bear or whatever that sits on your bed, **it becomes a security blanket.**”*

- Paul Marsden, Behavioural Psychologist

\$500bn

in projected growth for the global Pet Care industry by 2030

405%

increase in share price for designer toy brand Pop Mart between November 2024 and August 2025

JTBD #3: Help me embrace the comfort of my own life

“

*That's where my head goes, to like
take your time. It goes to like...
have a bubble bath. It's so for you,
so slow, and so intentional.*

- Female, 27, UK



DNA Analysis

Sovereign Singles have a deep need for soothing, but without built-in emotional or tactile support, they must create it themselves

Driver: Nurturance

eNabler (+): Time surplus

eNabler (-): Lack of support

From:

Performative empowerment

To:

Unapologetic ease

Build the sanctuary

Design products that help people feel calmer and more grounded — through touch, slow rituals and premium care.

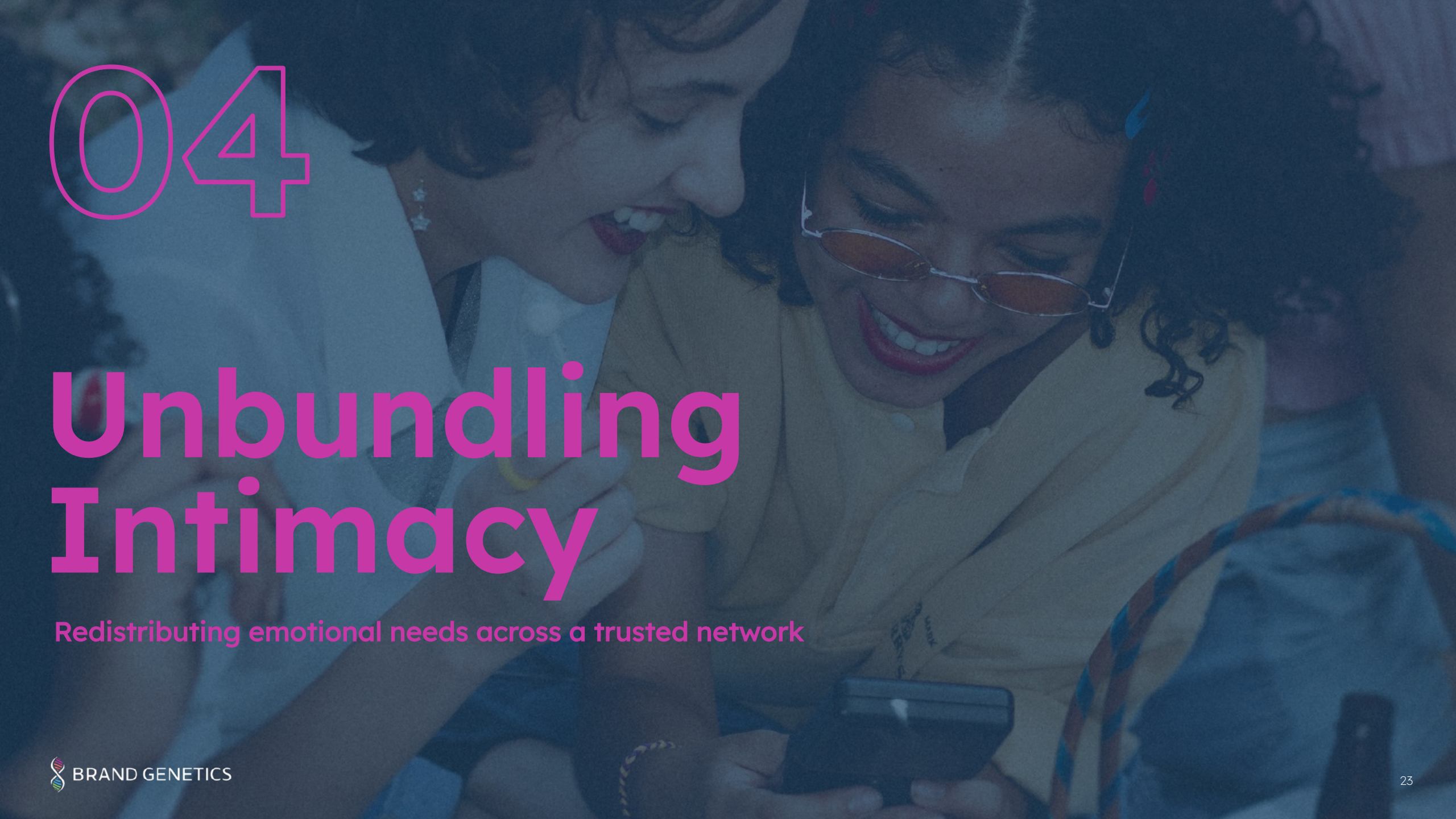
Grant permission to rest

Drop the 'girl boss' empowerment messaging, giving people unapologetic permission to drop the armour and embrace laziness



THE INSPIRATION

Graza sell sensory satisfaction for the soul, with ASMR-adjacent comms that tell the Sovereign Single they don't need to cook a 3-course meal to feel cared for. 'Girl dinner', but with high standards

The background of the slide features a photograph of two young women. The woman on the left is wearing a white shirt and has short dark hair. The woman on the right is wearing a yellow shirt, glasses, and has curly dark hair. They are both smiling and looking down at a smartphone held by the woman on the right. The image has a dark blue overlay.

04

Unbundling Intimacy

Redistributing emotional needs across a trusted network

Singles are **harnessing digital & physical spaces** to find belonging beyond 'the couple'



“Friendships are taking on the emotional load of partnerships... sharing much more with each other than they used to and seeing each other as an emotional outlet.”

- Holly Friend, Futurist & Cultural Strategist

Singles haven't stopped wanting connection, they have just stopped expecting it from romantic partners

Singles aren't looking to be 'fixed', but to fit in. They're strategically meeting their need for relatedness through various channels: rituals with friends, online micro-tribes & unconventional relationships.

89%

of Gen Z and Millennials consult their group chat for major life decisions

554%

rise in 'Galentine's Days' searches since 2019

JTBD #4: Help me experience everyday companionship

“

*What people miss is the **passive care and companionship** that a romantic partner would traditionally provide.*

*Because when friends see each other now, **it's the catch-up trap.***

- Female, 34, UK



DNA Analysis

Sovereign Singles deeply crave belonging – but with connection requiring constant effort, they are leaning on digital spaces to sustain it more consistently

Driver: Belonging

Ability (-): Social fatigue

eNabler (+): Tech

From:

Romantic exclusivity

To:

Distributed connections & networks

Validate the tribe

Elevate the 'chosen family' to partner status, using messaging and tools that validate & support deep platonic intimacy.

Engineer passive intimacy

Shift from high-pressure to low-effort occasions. Become the invisible glue by designing products and spaces that enable effortless 'parallel play.'



THE INSPIRATION

White Claw has successfully tapped into 'parallel play', positioning itself as removing the performative pressure without asking you to be romantic, celebratory or rowdy - showing friends just existing

The Sovereign Mandate:

A strategy for future- proof growth

If you can win the most autonomous, bandwidth-poor and uncompromising consumer in history, you can win anyone.

Here's how to start.

EVALUATE them.

STOP researching a demographic 'waiting room'.

Move beyond the Demographic Tickbox: Measure their Operating Conditions

Rewrite the Customer Journey: Track the influence of the group chat and 'chosen family'

Update your U&A: Understand how your brand intersects with the Sovereign Single

AUDIT their uncompromising operating conditions.

SHOW UP for them.

STOP marketing to a state of deficit.

Positioning: Are you validating their Sovereignty as an aspirational destination?

Innovation: Are you building the invisible co-pilot infrastructure to offload their mental load?

Occasions & Activations: Are you designing for unbundled intimacy?

DESIGN for a triumph of autonomy.

The Sovereign Single needs to be designed for.

We're here to help with a human-first perspective.



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