

5 TRENDS FOR 2019

Five powerful consumer trends. Five opportunities.
Are you ready?

Here we go. If you plan to make waves in 2019, then consider running with one (or more!) of these big five emerging consumer trends:

1. LEGISLATIVE BRANDS.

Progressive consumers will welcome the 'law of the brand'.

2. LAB RATS.

Why an extreme test and fix mindset is the future of wellness.

3. OPEN SOURCE SOLUTIONS.

A bold new frontier for sustainability.

4. SUPERHUMAN RESOURCES.

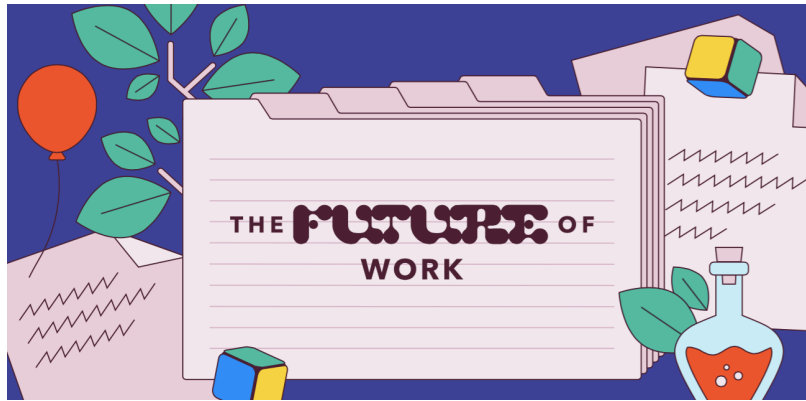
It's time for our emerging AI overlords to play fair.

5. FANTASY IRL.

Imagined and real worlds collide in the name of play.

Regular readers can dive straight in. New readers, here's the deal. The brands and organizations living these trends are *already* setting consumer expectations. You can too. As you read this report, keep asking yourself: how will these trends shape the expectations of *our* customers? What opportunities will the new behaviors they reflect present to *our* organization?

Read. Share. Discuss. But then far more importantly, **do** something with these trends! Good luck!



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1. LEGISLATIVE BRANDS

Progressive consumers will welcome the 'law of the brand'.

A painful dichotomy is opening up. On one hand, every startup or product that delivers a positive impact drives customers' aspirations for sustainable and ethical consumerism ever higher. At the same time, traditional governmental and bureaucratic institutions are increasingly either unwilling or unable to meet many of people's basic expectations. This has left people clamoring for strong institutions to resolve this tension and deliver positive outcomes.

Here isn't the place to comment on the political populism that has swept the world over the past few years (although we still firmly believe everything we wrote two years ago in [TRUTHFUL CONSUMERISM](#), that the only possible route to long-term success is an economy and society that promotes transparency, aspiration, positive impact, tolerance and empowerment).

Instead, let's dive into a much less well-known but just as powerful emerging consumer trend:

In 2019, frustrated consumers will welcome LEGISLATIVE BRANDS: corporate interests using their significant power to call for, promote, and even impose laws that drive constructive change and make the world a better place.

This is an undeniably huge shift. A generation ago, brand lobbying was synonymous with bad outcomes (think big tobacco and big oil). Now, thanks to countless positive examples of brand activism, 86% of consumers *want* brands to take a stand on social issues (Shelton Group, June 2018).

But LEGISLATIVE BRANDS is more than 'just' brand activism. Yes if you get brand activism right, it's still a powerful marketing strategy. Nike's provocative Colin Kaepernick campaign earned the brand more media attention than almost any other campaign during 2018.

But, as the examples below show, the most progressive brands are looking to do *more* than just raise awareness. They are looking to influence – and even change – the rules of the game for the better. And where they lead, customer expectations will follow.

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Examples



PATAGONIA – Anyone watching trends will be familiar with Patagonia's boundary-pushing environmental initiatives. But over the last 12 months, Patagonia's initiatives have moved beyond consumer-facing marketing campaigns

BEAUTYCOUNTER – **Beautycounter** is a US-based direct sales skincare and cosmetic brand with a network of 30,000 consultants. In March 2018, 100 Beautycounter consultants went to Washington D.C. to lobby members

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and become more formal and legal: last December the company **sued the US federal government** over planned cuts to Bear Ears National Monument; in November 2018 it **endorsed political candidates** in Nevada and Montana for the first time ever.

of Congress about the Personal Care Products Safety Act: took them a bipartisan bill that aims to give the FDA authority to regulate cosmetics ingredients (the bill is currently still under review). Beautycounter offered the all-expenses paid trip to Washington to the top two salespeople in each state, with attendees receiving training on effective lobbying strategies. The brand also released a new lip color, Beautycounter Red, to coincide with the day of lobbying.

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YOUR RESPONSE?

This is a trend that will likely make you, or many in your organization, uncomfortable. It should! Actively designing, lobbying for, or imposing laws and regulations is very different to creating a marketing campaign. It means authentic commitment to the common good. It incurs costs. It opens you up to criticism. It requires ongoing monitoring to ensure regulations are being adhered to. *That's the whole point.*

Many consumers are cynical of businesses' cause marketing efforts. Even those that aren't seen as 'purpose washing' risk being challenged on the actual impact of their campaigns. Just one example from the frontlines of the US culture war: recent years have seen **many brands** featuring transgender models in their marketing. But these campaigns will ring hollow if the Trump administration succeeds in its **reported plans** to legally define gender as fixed at birth.

If however you are committed enough to embrace the LEGISLATIVE BRANDS trend, then here are a few thoughts to kickstart your discussion:

First, if you want to apply this trend then know that it's 99% about *listening*. Listen to a diversity of voices - inside and outside your organization - and hear what they're saying about what needs to change. Then act. If you try to decide What's Best for Everyone in a unilateral way, you'll rightly face criticism.

Are there any laws that are simply antithetical to your brand values and positioning? Are you bold enough to 'break' them? Or at least find a loophole as Ceramiracle did with its innovative China distribution strategy.

In an era of **GLASS BOX BRANDS**, your internal culture is your most powerful external marketing asset. Could you empower your staff to lobby for new -and better!- laws, as BeautyCounter did? Or, could you impose new 'laws' on your staff? **WeWork** recently banned its employees from expensing meat. You could think even bigger: Microsoft's initiative reaches beyond its own employees, to its suppliers.

Still need to convince people in your team that is where things are headed? Use Patagonia's involvement to win them over! After all, Patagonia is the poster child of brand activism. It has followed up its famous 'Don't Buy This Jacket' 2011 Black Friday campaign with all manner of tangible **activist environmental initiatives**. Its move into more formal legal and political action is a powerful signal that will redefine what customers expect of *all* brands in this space in 2019.

2. LAB RATS

Why an extreme test and fix mindset is the future of wellness.

Silicon Valley took a beating in 2018. But there's one area where its influence continues to grow, and indeed will be positively welcomed. Among wellness-seekers (and yes, that's almost all of us), a new mindset, is taking hold when it comes to one's health, wellness and lifestyle.

In 2019, LAB RATS will see human wellness and lifestyle as an engineering problem to be solved. This outlook, with its origins in the Valley, will see rising numbers enthusiastically apply a test and fix approach to optimizing their health and lifestyle outcomes.

This trend has been building for a while. A host of apps and devices – think Fitbit, Strava, MyFitnessPal, Apple Health and more – have made millions increasingly aware of their health metrics and stoked the desire to be in control. But here are two reasons why 2019 will be the tipping point for LAB RATS.

First, the explosion in direct-to-consumer startups that leverage 'evidence-meets-marketing' social content means that in 2019 curious consumers can find – and easily purchase! – even the most niche and experimental solutions for any micro-health need.

Second, continual and dramatic falls in the cost of 'hard' science (DNA sequencing today; Crispr tomorrow) means that science fiction-level technologies are now within reach of boundary-pushing consumers. Yes, most consumers won't *personally* have regular DNA-based wellness experiences in 2019. But as with the Quantified Self movement a decade ago, awareness of – and demand for – convenient and affordable hyper-personalized wellness is growing, fast.

Here's how brands across multiple sectors are catering to LAB RATS.

NESTLÉ – Launched in Japan in May 2018, the **Nestlé Wellness Ambassador** is a service providing customers with personalized nutritional advice based on their dietary habits, DNA, and blood test results. Users upload pictures of the food they eat via the Line messaging app. Meanwhile at-home DNA and blood tests assess their vulnerability to common diseases such as high blood pressure and diabetes. The service then provides personalized dietary advice, as well as specially formulated vitamin supplements. The program costs around USD 600 a year.

TIMESHIFTER – Released in July 2018, **Timeshifter** is an app providing personalized plans to help people minimize the effects of jet lag. The app operates via an algorithm, used by NASA astronauts, that takes users' ages, sleep habits, flight schedules, and whether they consume caffeine into account. Timeshifter then sends advice via push notifications. An individual trip costs USD 9.99, while a yearly subscription is USD 24.99.

KOLIBRI – Ir partnered Clark to create levels. The customers they prefer priced for

YOUR RESPONSE

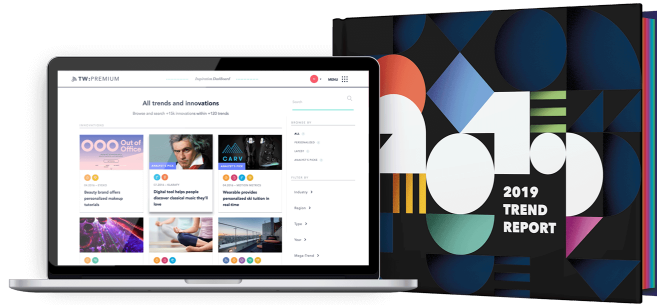
If you work in the wellness, beauty or food and beverage sectors then your head is probably already buzzing with opportunities.

Of course, there are many ways to approach this. Kolibri ripped up the rule book on packaged beverages and developed a bottle format that gives customers greater control. Pax's 'session control' feature brings data-driven precision to a traditionally ad hoc habit. Nestlé's Wellness Ambassador program brings DNA science to everyday diet and lifestyle.

But you can still tap into this trend even if you're not in those sectors, or if you don't sell consumable products. Think expansively about the personalized wellness-related lifestyle services you could offer? We can easily imagine travelers welcoming an airline or hotel chain offering them Timeshifter's jetlag-beating app.

Indeed, *no sector* is off-limits when it comes to expectations around constant optimization, driven by the mainstreaming of the engineering mindset. Take insurance. **Trov**, an on-demand insurance startup that expanded to the US in July 2018. It offers customers item-by-item coverage (more control!), while its Smart Premium automatically responds to changes in items' value (measure and optimize!). Or furniture. Tom Dixon's **IKEA collaboration** encourages a test and fix approach via user 'hacks' and customization.

Whichever sector you're in, focus on empowering your customers to **understand, control, test and fix** every aspect of their experience and you'll speak to the new expectations at the heart of the LAB RATS trend.



PREMIUM SERVICE

Consumer-focused professionals from adidas, Netflix, Nissan, Virgin, Samsung, Sephora, ING, Orange, Fujitsu, Spotify and many, many more have gained 2019 access to our Premium Service.

In the coming weeks and months, they'll be using the platform to ensure their plans remain deeply aligned with what their customers want next.

[Find out more here](#)

3. OPEN SOURCE SOLUTIONS

A bold new frontier for sustainability.

You're undoubtedly working to tick the positive impact box. Perhaps you have a related KPI or two. But are you *really* making a difference? A lasting, meaningful difference that will be felt by future generations? Cynical consumers don't think so either.

That's why in 2019, the boldest and most inspiring organizations will embrace OPEN SOURCE SOLUTIONS: sharing and even giving away their

innovative solutions to our toughest shared problems.

What's bringing this trend to the top of the sustainable and ethical business agenda?

First, it's now simply assumed your organization is working to reduce its impact. For example, the Ellen MacArthur Foundation **announced** in October 2018 that over 250 organizations, including PepsiCo, Coca-Cola, Unilever and H&M, had signed its pledge to eliminate single-use non-recycled plastics by 2025. This is good news, of course. But these important and ambitious efforts have become background noise to many consumers. Fair? No, but it's the truth. Organizations that wish to differentiate themselves – to *set* expectations – must do even more.

Combine this with the fact that while mega-brands keep getting bigger, they are often still tiny players in the epic arena that is modern consumerism. One telling example: McDonald's and Starbucks with their global footprints still only distribute **4% of the estimated 600 billion cups** the world uses each year. The takeaway here? Even global mega-brands can't solve our toughest shared problems alone. But one way they *can* make a transformative difference? Leverage their resources to create powerful new solutions – and then share those solutions with the world.

With that in mind, let's take a look at the most exciting frontier in sustainability, where pioneering brands are creating – and then sharing – OPEN SOURCE SOLUTIONS:

matured innovations



HP, IKEA & NEXTWAVE – In October 2018 it was **announced** that HP and IKEA had joined NextWave Plastics, a coalition to reduce ocean-bound plastics. Both HP and IKEA already have numerous initiatives focused on reducing their plastic consumption. By joining NextWave Plastics the brands pledge to share their learnings and technologies in 'a collaborative, open-sourced and transparent fashion to create the first global network of

ALLBIRDS & BRASKEM – After three years of development, US shoe brand Allbirds debuted its **Sugar Zeffer** flip-flops, which use the first sustainable version of EVA foam. The typical EVA foam used in shoes is produced using fossil fuels, while Allbirds' SweetFoam is made from sugarcane. SweetFoam has a molecular structure that is identical to EVA foam and feels the same way on the foot. The platform Allbirds and its partner petrochemical company Braskem

UBER, LYFT – that Ford, I public-priv urban tran Bloomberg cities, inclu standards

ocean-bound plastics supply chains'. NextWave plastics was founded by Dell Technologies and Lonely Whale in 2017 and now includes 10 companies including General Motors and Herman Miller. has also made the formula for the material open-source, enabling c meaning that any company – in the footwear industry and managem beyond – has access to it. The Sugar Zeffer flip-flops retail for USD 35.

YOUR RESPONSE?

This is one of the biggest and most impactful trends we've *ever* published! It should challenge and excite you in equal measure. But let's take a moment to note that while the innovations above might be new, the underlying thinking isn't. In 1959, Volvo invented the three-point seat belt. Next, they famously made the patent available to everyone in the interests of public safety. It's estimated that since then the invention has saved over 1 million lives. The brand still (rightly!) **celebrates** this decision. What could you do in 2019 that you can still talk about in 60 years time?!

Feeling inspired by OPEN SOURCE SOLUTIONS? Here are a couple of thoughts to get you started:

Don't wait until you've got a solution before you start collaborating and sharing. After all, it's unlikely you'll be able to solve huge industry-wide issues on your own. NextWave is a collaboration of ten companies from different sectors, all focused on the issue of ocean-bound plastics. Fierce ride-hailing competitors Uber and Lyft are working together (!) with Ford and SharedStreets, a data platform to solve urban congestion. AllBirds tapped petrochemical company Braskem for its SweetFoam soles. Who's your perfect partner?

Yes, sustainability is an obvious target. But don't limit yourself to eco-issues. Starbucks' open sourcing of its racial bias training shows there are other socio-cultural issues where you can help contribute to a better future (even if this wasn't exactly a planned move).

But the first questions to ask are radically simple ones: where are we making a positive impact? Could we have an exponentially bigger impact if we shared what we're doing? What's stopping us?

On that final question: don't hide behind outdated notions of 'competitive advantage'. The long-term benefits you'll get from being seen as a leader will far outweigh any short-term benefits from a specific material or process. Leave a legacy!

4. SUPERHUMAN RESOURCES

It's time for our emerging AI overlords to play fair.

The previously mentioned techlash of 2018 has many parts. Some have been outraged at where their data ends up. Others resent the negative social impacts that the tech giants have fueled. Others still are frustrated at the mismatch between what tech promises and what it delivers.

Here we'll look at one key pain point which, like most pain points, also contains an epic opportunity for those organizations that are able to resolve it.

In 2019, rising numbers of consumers will demand SUPERHUMAN RESOURCES: ethical AI and algorithms that deliver fair and unbiased decisions.

Why is this the key technology challenge for 2019? Recent years have seen rising awareness of both how much of our lives are shaped by decisions made by AI and algorithms, but also just how fallible and biased decisions made by those algorithms can be. The news keeps coming, and it isn't pretty: take evidence of facial recognition systems being significantly **more reliable on white male faces** (what a surprise 😊), or worse disproportionately **flagging black politicians as criminals**. Or Amazon discontinuing its algorithmically-fueled hiring tool, **which turned out to be biased against women**.

The result? A deep shift in attitudes to technology. In a **survey** of 27,000 consumers in eight markets, 97% of consumers now expect brands to use technology ethically. Hardly surprising. More interestingly, 94% now say if not then governments should step in. That's a profound change from the era when tech companies could do no wrong...

Let's take a look at organizations at the leading edge of this trend:

Examples



FACEBOOK – At its May 2018 F8 developer conference Facebook announced a tool called **Fairness Flow**, intended to help identify biases in the platform’s algorithms. The tool was first targeted at the platform’s jobs algorithm, where it sought to identify gender and age-based bias. Fairness Flow is now available to any Facebook engineer to evaluate an algorithm for bias. In September the American Civil Liberties Union filed a gender discrimination lawsuit against Facebook and ten of its advertisers, citing a tool that allows advertisers to target job ads solely at men.

IBM – September 2018 saw IBM announce a suite of tools to tackle bias and increase **transparency in AI** services. The package enables users to check whether certain individuals or groups are subject to bias, tools to help developers identify what might be causing biased outcomes, and suggestions on how to correct them. The tools can be used on IBM’s Watson platform, as well as with third party frameworks such as Tensorflow and AzureML.

CRISIS TEXT has trained over 62 million managers. The company handles difficult situations, firings and

YOUR RESPONSE?

Step one when it comes to applying this trend? Ensure your existing AIs and algorithms are ethical and unbiased. When consumers see tech giants such as Facebook and IBM making changes to do just that, what changes will they start to expect from you?

But if you’re not a tech giant, don’t think this trend is out of reach. Perhaps you could partner with an AI startup to use data to shine a powerful light on an important issue, as Forbes Brasil did? Or even better, perhaps you have a unique dataset that can help *others* deliver better outcomes. Nonprofit Crisis Text Line tapped its own unique dataset to create a new chatbot that helps managers learn to have difficult conversations.

But wherever you start to apply SUPERHUMAN RESOURCES, there’s one challenging truth at the heart of this trend. You know that customers expect the people inside your organization – your human resources – to be fair and ethical. But when a human staff member makes a bad decision, most customers will be willing to view this as an isolated mistake. They won’t be so forgiving if they discover that your algorithms and AIs are structurally biased or unethical.

In 2019 you have a choice: make your digital outputs truly superhuman (i.e. flawless); or make them a little more transparent, a little slower, indeed a little more *human*.

5. FANTASY IRL

Imagined and real worlds collide in the name of play.

Humans have always sought out escapism. From telling stories around the campfire, to cheering on a sports team, to booking last minute getaways. Increasingly societal polarization, inequality and political turbulence are prompting many to seek out a break from the 'real world' with greater urgency. See the near-tripling of Google searches related to 'anxiety' in the last ten years.

Alongside a growing desire to get away from it all, consumers have more channels with which to escape than ever before. Media consumption continues to grow to almost insane levels: American adults spend more than 11 hours per day (!) interacting with media. At the same time, media itself is becoming ever-richer and more immersive: 80 million Americans use augmented reality every day.

Yes, 24/7 connectivity and digital experiences that blur the boundaries of the real and virtual are not 'new' trends, but in 2019 their convergence will reach deeper than ever before into culture. Your customer is now a veritable escape artist, able to plug into a universe of their choosing - from the battle royales of Fortnite, to their fantasy sports league - at any moment. At home, stuck in traffic, bored in a meeting...the scope to imagine, escape, explore, create and connect is unlimited.

In 2019, fanciful worlds will permeate the real world as never before. As consumers seek out FANTASY IRL and play on the blurring boundaries between real and imagined, smart brands will join in the fun!

Examples



LOUVRE – The Louvre in Paris began offering Jay-Z and Beyoncé at the Louvre, a self-guided tour, in July 2018. The art museum's tour stops at each of the artworks featured in the couple's music video for APES**T, which was filmed at the museum and released in June 2018. The

TIFFANY & CO AND TIONG BAHRU BAKERY – August 2018 saw jewelry brand Tiffany & Co. partner with Tiong Bahru Bakery to make Breakfast at Tiffany's a reality. The Singapore-based bakery's flagship was painted in Tiffany's signature eggshell blue, with the surrounding

BLIZZARD – donated U Research F charity can 15 pink ski

17-stop tour explains the history behind each artwork, but area dressed up to look like a New York sidewalk. Of not specifically why Jay-Z and Beyoncé displayed them in course, with it being 2018, visitors were invited to share the clip. their #tiffanyxtbb experiences on social media.

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YOUR RESPONSE?

You'd be hard-pressed to name any business more proven in building transmedia fictional universes that capture the imagination of tens of millions of consumers, than **Blizzard**. And in breaking the record for the single largest donation made by a corporation to the Breast Cancer Research Foundation, they proved the life-changing impact these universes (and their participants) can have in the real world.

Don't fret. You needn't be a game studio with millions at your disposal to play within this trend. Could there be a more 'now' example of FANTASY IRL than jeweler Tiffany & Co. leveraging a much-loved cultural artifact and bringing it into the real world for the experience-hungry Insta-generation? Going the other way, see how the Louvre made itself relevant to a new generation by harnessing the good old-fashioned audio guide to layer Beyoncé and Jay-Z's creative output onto the gallery. Not only does this give fans a new chance to connect with their favorite superstars, but it provides a little educational benefit, too!

One final thought. Yes, some instances of this trend might feel a little gimmicky. Do diners *need* to see a virtual chef prepare their food? Does this mean the search for natural and authentic experiences is over? No, of course not! Not all trends apply to everyone, all of the time! But in these turbulent times, perhaps your audience might welcome a little light escapism?

Whichever angle you take on FANTASY IRL, in 2019 consumers *will* weave in and out of the real world in an ever-growing number of fantastical ways! The question is, will you keep up?

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THE BIGGER PICTURE

The 5 trends featured here are important, but they represent just a small fraction of the consumer landscape.

Clients of our **Premium Service** have an instant global Trend Department at their fingertips. They have access to our entire Trend Framework, built around the 16 mega-trends that define modern consumerism. Beneath these sit 120+ actionable trends (the trends featured here, along with a host of

others we continue to track), all illustrated with 19,000+ hand-curated, best practice innovations. If you're serious about trends, it's a no-brainer.

OVER TO YOU

As always, we wrap up these annual Trend Briefings with a call to action...

While it's our job just to watch trends, ambitious business professionals should read this Briefing with only one thing in mind: how to *apply* these trends to create compelling new innovations that will delight your customers (and win new ones!).

So, what are you waiting for? Time to make 2019 your best year yet!









Cheers! Proost! 干杯! Salud! Skål! 건배! Santé! Prost! Şerefe! Mabuhay! Saúde! Chok dee!

ABOUT THE AUTHOR:

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IT TAKES A TEAM

This Trend Briefing has many hands on it. A huge thanks to the team that pulled this together with such positivity and enthusiasm, especially: Vicky Kim and Nikki Ritmeijer (for design!), and also Maxwell Luthy, Vicki Loomes, Henry Mason, Alida Urban, Harry Metzger, Harvey Gomez, Jareth Ashbrook, Jonathan Herbst and Lisa Feierstein. THANK YOU!

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