5 TRENDS FOR 2020 (AND 23 FOR 2023!)

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

UPDATE: For an up to date take on the opportunities for *this* year, please dive into our 2023 Trend Check!

January 2020 | It's here! For what feels like forever, 2020 has been every trend watcher's near-mythical time horizon. Now, we're about to live it.

New challenges – and huge new opportunities! – are ahead. So here are five key emerging consumer trends to supercharge your planning. Each one is a powerful opportunity to build new products, services, campaigns, brands and more that people will love in 2020 and beyond.

1. GREEN PRESSURE
In 2020, consumers move from eco-status to eco-*shame*.

2. BRAND AVATARS
Human brands take powerful new form.

3. METAMORPHIC DESIGN
Consumers demand relevance as a service.

4. THE BURNOUT
Smart brands rush to help those burned by the pressures of modern life.

5. CIVIL MEDIA
Why the future of social is *meaningful* connections.

Remember, trends mean nothing if you don't use them to make what you do – and the world – better. So absorb these trends, take them to your team, share, discuss, argue and conspire.

But most of all, *act*.
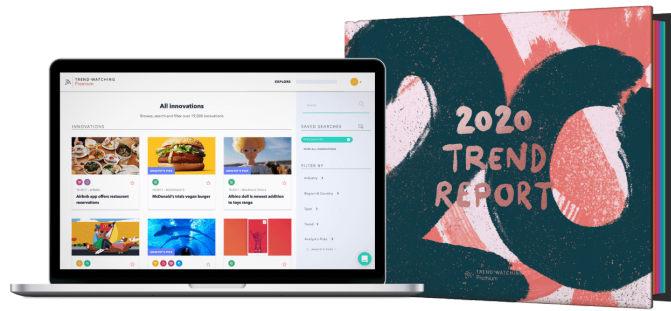
2020 TREND REPORT

This is just a sample of the full 2020 Trend Report, available as part of our Premium Service.

Clients get more trends, more context and structure, more useful formats, ongoing updates and much more!

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1. GREEN PRESSURE

In 2020, consumers move from eco-status to eco-shame.

The search for a more sustainable consumption is reaching a critical moment.

When sustainable alternatives are widespread, affordable and just as good or better than the legacy option, then eco-consumption becomes less about the *status* of opting in, and more about the *shame* of opting out. That's why in 2020, millions of consumers will seek out products, services and experiences that help them alleviate rising eco-shame.

It's hard to overstate the significance of this shift. We've been tracking the search for a more sustainable consumption for over a decade. The common thread that runs through much of it? The evolution of eco-consumption as a *status* play.

Just take a look at three iconic eco-consumption moments. Way back in 2008 Tesla launch the Roadster, a USD 100,000 electric supercar. Eco-status! In 2016 Adidas partner with Parley for the Oceans to produce a limited-edition line of sneakers made from recycled ocean plastic; only 50 pairs are made. Eco-status! Also in 2016, NYC's Momofuku Nishi becomes the first restaurant in the world to offer the Impossible Burger. Yet more eco-status!

But what has been the story since then? Fast-forward to 2019, and Tesla's Model 3 is a play for the mainstream driver, and now the third best-selling car in the UK. Adidas made 11 million pairs of ocean plastic sneakers in 2019. And Impossible Burger is available at over 7,000 Burger King outlets across the US.

From high-end and rare to affordable and widespread: that's the eco-consumption journey across the last few years. And when eco-alternatives go mainstream in this way, they're no longer an exciting status currency. The key implication? A shift in the moral calculus for consumers. Because when eco-alternatives are as available, affordable and effective as the legacy option, there's no reason *not* to choose them. Eco-consumption becomes less about the status of opting in, and more about the shame of opting out.

Throw in Extinction Rebellion, the global Strike for Climate movement, and Greta, and you have a tipping point in awareness also fueling this crucial shift.

Increasingly widespread shame at air travel – or *flygskam* in the original Swedish – is now set to diffuse across every B2C industry. It's a shift with profound implications for consumerism, business, everyone. Implications that you *must* act upon in 2020. 🌍

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Examples

KLM – We all remember Patagonia's groundbreaking 2011 'Do Not Buy This Jacket' ad. In a world of GREEN PRESSURE, millions will demand that brands drenched in eco-guilt radically reform their attitude to their own offering. The Fly Responsibly campaign, launched by KLM Royal Dutch Airlines in June 2019, asked passengers to consider whether they really needed to travel, and if so, whether their journey would be better undertaken by train. A video also asked all flyers to travel light, and to offset flight-related CO_2 emissions. Meanwhile, November 2019 saw EasyJet became the first airline to ...ounce plans to offset carbon emissions from all ...hts.

...re examples >>>

DOCONOMY – How about new tools that help consumers track behavior and avoid eco-shame?
February 2019 saw Sweden-based fintech Doconomy partner with Mastercard to offer a credit card that lets users track and limit their CO_2 footprint. The DO Mastercard tracks the CO_2 impact of purchases, and blocks payments when the user exceeds their personal carbon emission budget. The fully biodegradable card is printed with Air Ink, an ink made from recycled air pollution particles.

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YOUR RESPONSE?

We're not saying that the behavior of all, or even *most*, consumers is going to turn 180 around this trend in the year ahead. The evolution of GREEN PRESSURE will be complex and long-running.

But it is a tectonic shift with profound implications for business. And responding to the initial tremors – which *will* be felt in the months ahead – will send a clear message to consumers that you get it.

Think about two modes of response…

Shame therapy will be about helping consumers alleviate the eco-shame they feel when they engage with you.

That means initiatives that acknowledge shared eco-guilt, and help consumers take steps to avoid it. Practical steps are key: see Burger King trying to atone for decades spent producing disposable plastic toys. But this trend also demands a radical shift in our shared attitude to consumption: Dutch airline KLM is asking consumers to fly less. What is the equivalent for you?

Shame avoidance will be about helping consumers avoid eco-shame altogether.

Think new tools that enable them to track and control their own eco-impact will be embraced; see how the Doconomy credit card helps consumers stick to a personal carbon budget.

Consumers won't expect you to be perfect. No one can eradicate the damaging impacts of consumerism overnight. But in 2020 they'll look for clear signs that you understand a new world of GREEN PRESSURE, and that you're taking the first steps in a long and necessary journey towards change.

2. BRAND AVATARS

In 2020, human brands take powerful new form.

You already know that virtual influencers are moving into the mainstream. This year saw Lil Miquela, the best-known among Instagram's virtual influencers, star alongside supermodel Bela Hadid in a (cringe-inducing) campaign for Calvin Klein.

Meanwhile, virtual avatars are making noise elsewhere. The Chinese state news agency, Xinhau, have launched their second virtual news anchor. And the newest member of the YouPorn's legendary marketing team is a virtual character called Jedy Vales. Just another slice of digital ephemera? Perhaps, but a crucial shift informs these three examples.

The media landscape continues to fragment. Digital channels multiply. One opportunity? In 2020, consumers will pay deeper attention to brands who embody themselves via new virtual characters and avatars, allowing them to inhabit digital channels in richer, more immersive and more human ways.

Deep underlying forces are fueling the rise of BRAND AVATARS.

First, a multiplicity of digital channels – TikTok! Fortnite! Alexa! In-store touchscreens! – means new expectations when it comes to the democratized conversation between brands and consumers.

Second, consumers are already becoming accustomed to meaningful relationships with AI-fueled entities. Relationships that go way beyond *Alexa, order me some washing powder*, and that encompass wellbeing, creativity, and even the human need for companionship. Now Amazon are working on a

wearable that will understand and respond to the emotions of the user. The rise of these VIRTUAL COMPANIONS is priming consumers to expect branded virtual entities that connect to them on a deeper level.

So, ready to code your BRAND AVATAR to life in 2020? First, check out how others are doing just that.

Examples

SK-II — Could a new AVATAR be your primary point of contact with customers? Japan-based skincare brand SK-II announced in June 2019 that it has created YUMI, an avatar ambassador for the brand. YUMI was built using AI, and can autonomously move, interact and develop her own personality – without being controlled by a human. The avatar is designed to answer questions in a 'warm' manner, and give customers real-world advice about SK-II products and how to take care of their skin. Consumers will be able to interact with YUMI via their devices and in-store. The avatar will be able to speak in multiple languages including Japanese, English and Mandarin. A launch date has not yet been announced.

WENDY'S — Think of online shared video games and other virtual worlds as new frontiers for the right BRAND AVATAR. US-based fast food restaurant chain Wendy's won the Social & Influencer Grand Prix in Cannes in June 2019 for Keeping Fortnite Fresh, a campaign inside video game Fortnite. A digital avatar in the video game, resembling Wendy's red-haired mascot, entered burger restaurants in the game, located the freezers and destroyed them to make the point that Wendy's never uses frozen beef. The campaign was streamed on Amazon's live-streaming platform Twitch, and many Fortnite players joined in destroying the freezers.

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More examples >>>

YOUR RESPONSE?

This trend is just one, actionable angle on a far deeper and ongoing shift that you know well.

Back in the days of top-down, legacy, one-to-many media, we had top-down, legacy, one-to-many brands. Now we live in a world of democratized, participatory, immersive media. And that means the rise of democratized, participatory, immersive brands.

Most consumers don't want to *connect* with a fast food, cosmetics, or media brand. If your guiding idea when you apply this trend is, 'hey guys, let's be friends!' then you're going to faceplant. But what consumers will respond to are brands that meet them in the digital channels *they* live in, and serve them: solve pain-points, offer useful information, and yes, even deliver a dose of fun.

Applying this trend effectively, then, means thinking hard across two dimensions. First, the digital lives of the consumers that you want to reach. Second, your brand and its values.

On the digital lives of your consumers, ask yourself: who do we want to reach with a new AVATAR? Crucially, what digital channels are these consumers living, working, playing inside? Will our AVATAR be about solving a serious pain point inside a traditional channel? The BBC made a new AI-fueled assistant that understands regional accents from across the UK. Will it be about playing alongside consumers in a way that enhances their experience of the channel: see Wendy's and their AVATAR inside *Fortnite*.

Clarity around your brand is just as important. When you create an AVATAR, you're bringing your brand – its values, characteristics and essential nature – to a new kind of life. Take this trend, then, as an opportunity to clarify your brand as never before. Gather your team and ask: what are the fundamental properties of our brand? What kind of virtual character would personify the values we hold? Does the AVATAR we see taking shape unintentionally send messages that marginalise or exclude certain groups?
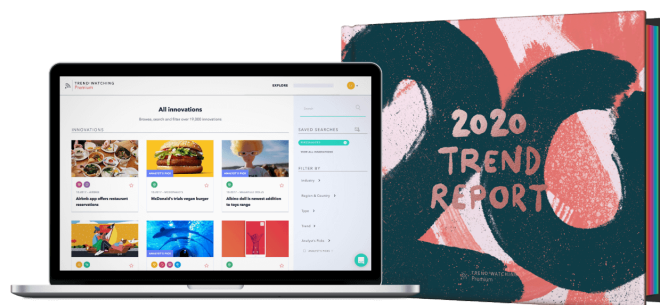
3. METAMORPHIC DESIGN

Consumers demand relevance as a service.

Two powerful consumer expectations are converging.

The desire for personalization – 'give me exactly what I want!' – has always been a part of the story of consumerism. Meanwhile, a decade of on-demand and 'everything as a service' has reshaped the meaning of convenience for millions around the world.

The next chapter? **In 2020 consumers primed by constantly evolving digital services and smart physical spaces – and accustomed to the ultra-convenience of 'everything as a service' – will increasingly expect *relevance as a service*, too. That means services and experiences that constantly adapt around the changing needs of the user**.

This trend is founded on an eternal human truth: people are always in a state of flux. For that reason, there can never be one perfect product, service or solution for any given person. Rather, a true perfect fit means constant adaptation around the changing individual.

But why *now*?

Facial recognition, sensors and smart objects are turning the world into a landscape that shifts and changes around consumers. The result is ever-heightening expectations for responsive personalization. No wonder 39% of global businesses say they have started to deliver personalized experiences in real-time (Adobe and Econsultancy, February 2019).

New technologies – think affordable DNA testing, blood testing and more – are making new innovations that shift and change around the changing

human body possible for the first time.

Meanwhile, subscriptions, on-demand and sharing have become a part of daily life for millions: a recent survey of US consumers found more than half (54%) of online shoppers pay for at least one subscription box service (Clutch, September 2019). The next step? Expectations for seamless convenience will intersect with heightened expectations for ever-shifting personalization.

Ready to deliver relevance as a service in 2020? First, take a look at how others are riding this trend.

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Examples

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SHISEIDO — This new METAMORPHIC skin cream adapts around the user on a daily basis. In July 2019, Japanese beauty brand Shiseido announced the global launch of Optune, a new skincare service. Users take a daily selfie via an app. An algorithm analyzes their skin, and also takes into account environmental factors such as temperature and humidity, as well as sleep data. This information is sent to a bespoke device, which mixes the user an optimized skin cream matched to their personal needs. Optune was first trialled in 2018.

More examples >>>

BAZE — How about truly METAMORPHIC health supplements? In May 2019, personalized vitamin startup Baze closed a USD 6 million series A funding round. Baze customers use a device to capture a small amount of blood, which they then send to Baze for testing. Users then receive a monthly subscription of multivitamins and other supplements that are optimized around their personal nutrition needs. The blood test is repeated each quarter, and supplements are iterated accordingly. A starter kit costs USD 99 and the subscription starts at USD 15 per month.

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YOUR RESPONSE?

Sure, METAMORPHIC vitamin supplements (see Baze) or skin cream (see Shiseido) almost certainly aren't on your agenda for 2020.

But as ever, we're not showing you these innovations so that you can copy them. It's the *underlying expectations* that these examples are signalling that's crucial here.

Convenience and personalization are already on your radar. But in a METAMORPHIC world, consumers will expect the merging of those two imperatives. Not just your offering as a service, but relevance as a service, too.

So the key question for your team: when vitamin supplements iterate around the changing needs of the user, and when skin creams adapt on a *daily* basis, what form of ultra-convenient, ever-shifting personalization will your customers come to expect from you?

Could you launch an 'X as a service' innovation that also delivers relevance as a service? Or will it be more about imbuing your product with new features that allow it to constantly shift and adapt around the needs of the user, as the Tonal workout station does?

What does a METAMORPHIC banking service look like? Or METAMORPHIC retail, media, travel...the list is endless!

4. THE BURNOUT

Smart brands rush to help those burned by the pressures of modern life.

Three glimpses of an urgent opportunity for you to help:

86% of British people say they have experienced anxiety due to work pressure in the last year. 87% have difficulties switching off from work, and 79% cite feelings of failure as a result (Microsoft, September 2019).

Two thirds of working parents in Australia struggle to care for their health due to the tension between work and caring. One in four are thinking about

quitting their job (National Working Families Report, October 2019).

71% of women and 66% of men in Singapore feel they work in an 'always-on' environment, with a constant need to access work emails, answer calls or check phones (Cigna, March 2019).

No wonder that in May 2019 the World Health Organization recognized burnout as an occupational health phenomenon.

Constant pressure to be on fire all the time – personally and professionally – is causing many to burn through their mental and physical reserves. Amid a growing focus on wellbeing, individuals are confronting the impact of always-on lifestyles. In 2020, those consumers will look to brands to help them battle THE BURNOUT.

That's where an on-demand culture, in which self-appointed gurus sell the #hustle as a lifestyle and corporate icons champion a 966 work schedule, has brought us.

Taking action is the right thing to do, and a huge opportunity for innovation. An opportunity to serve consumers. And to change *yourself* from the inside out. Get ready for a future in which the mental wellbeing of your employees is just as important as your supply chain. As your environmental footprint. As your mission. Put simply: the best organisations will recognise this new reality, and reorientate their internal culture around it.

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Examples

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THRIVA — What about new tools that empower consumers to manage THE BURNOUT? UK-based home health company Thriva launched its Stress Test offering in Q1

WPP HEALTH AND BIOBEATS — Yes, there's something slightly sinister about this example. But paying deep attention to the mental welfare of your own people is a key

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2019. The saliva-based test measures the cortisol levels; cortisol is a hormone associated with stress. Users are able to see if their cortisol levels are high, and when they peak throughout the day. Users chew on a piece of a material four times within one day and then send the samples back to Thriva for analysis. Thriva's offering, priced at GBP 79, promises results within 48 hours.

More examples >>>

application of this trend. To coincide with World Mental Health Day in October 2019, employees of the agency WPP Health in London, Milan and Sydney were given a BioBeats wearable monitor to track metrics such as heart rate, steps and sleep. Participants also tracked their weekday and weekend anxiety levels via an app, which used AI to suggest lifestyle adjustments. At the end of the trial, BioBeats shared data with WPP Health to help the agency determine where to invest in mental health support.

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YOUR RESPONSE?

If you're a wellbeing brand, the path ahead is clear: address burnout in 2020.

Even if you're not, are there new offerings, support, or advice you can offer that can help? See how IKEA India focused on sleep.

One way to apply this trend? Simply make the task of engaging with your brand easier, faster and more efficient, so that you kill much or all of the hassle/stress associated with it. Couple that with a campaign that tells consumers: 'we get it, you're stretched. That's why we've made things easier,' and you have the makings of a great 2020 campaign around this trend.

But perhaps the most powerful application of this trend, and one that any brand can look to? Make meaningful changes to your *internal culture* that alleviate stress and potential burnout among your own people.

First, it's the right thing to do. Second, it makes business sense (see how Microsoft increased productivity via a four day week). Third, in a transparent GLASS BOX world in which your internal culture is an increasingly important part of your brand, it will send a powerful signal to the world – and to potential customers – about who you are and what your brand stands for.

In a world in which pretty much every form of brand messaging has become so much white noise, it's hard to think of any play more powerful in 2020.
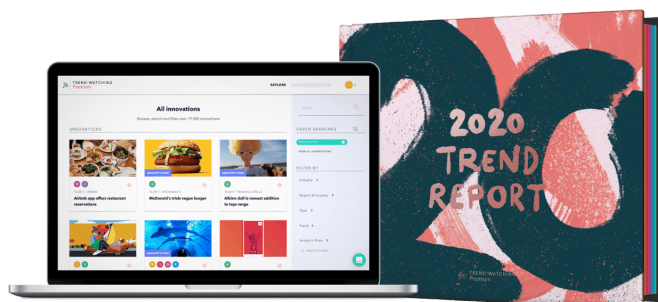
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5. CIVIL MEDIA

Why the future of social is meaningful connections.

Legacy social media has been a car crash for our collective and individual social relations. And the only thing the Big Platforms care about is keeping us addicted.

There, we said it. And sure, there are legitimate arguments about the shades of grey here. No one has a problem with a great no context Twitter account. But the benefits of social are being overwhelmed by bad actors and toxicity.

In 2020 consumers will seek an antidote to vast and toxic online communities and social media platforms. They'll embrace smaller and more intimate digital spaces that facilitate respectful and meaningful connections, let them interact with like-minded peers and allow them to truly be themselves.

What's driving this? In brief:

As 2019 comes to a close, the zeitgeist is now more attuned than ever to the failure of the big platforms to to step up to their responsibilities (go Sacha!).

And evidence that mainstream social media is often a toxic morass of bullying and harassment is now impossible to ignore. See this recent Cornell University study which found that female Instagram influencers are criticized for being too real and, you guessed it, criticized for not being real enough. Or the linking of social media to a sharp rise in teen suicide rates.

Put it all together, and 2020 is the year that the search for a new kind of social achieves lift off. The only question is: will you be involved?

Examples

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LT – Think communities that truly empower. July 2019 saw US-based startup Quilt launch an app that helps professional women host gatherings out of their homes. Users can search for meet-ups happening near them, in which small groups gather to share personal experiences around a variety of topics – anything from money and fundraising to love and social media addiction. Women purchase tickets for chats (USD 12-30) and hosts receive a portion of sales. Users can also purchase an all-inclusive membership for USD 39 per month. Quilt members who meet at chats can continue to connect with one another through the app.

More examples >>>

SPRITE – Could you partner with an online platform to create a CIVIL space? In October 2019, soft drink brand Sprite launched a campaign called You are Not Alone in Latin America. The brand worked with Google to identify personal issues of concern to young people, and then opened forums on Reddit to allow young people to connect and discuss with others. Each forum was led by an influencer with experience in the issue, and subjects included concerns around still being a virgin, or coming out as transgender. This follows the January 2019 I Love You Hater campaign, which addressed bullying.

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YOUR RESPONSE?

Connection and self-expression are fundamental human needs. Consumers will continue to seek to meet those needs online – in 2020, and forever. But creating new CIVIL MEDIA platforms in 2020 will depend on your ability to do something that legacy social media currently won't. That is to look beyond the race for short-term profits, eyeballs at all costs, and massive scale.

Instead commit to a long-term mission, a constructive social space, and the *right* scale. How can you create new communities and foster new connections that are truly relevant, meaningful, life-enhancing and supportive?

Think about the interest groups, tribes and collectives that look to you, and could see you as a credible meeting place. Think about real-time, pop-up communities: see how The Night Feed is seeking to serve new mothers who are awake breastfeeding in the small hours.

And crucially, think most about those for whom legacy social media is often most toxic: traditionally marginalised and overlooked groups, including women (yes all women, still marginalised and overlooked in 2019!). See how Stream Queens is reaching out beyond the often white, male world of gaming to gamers who fall outside that category.

If you can create a truly CIVIL space for consumers to come together online in 2020, then ultimately the rewards will be huge. But your desire to serve your community must be authentic, sincere and properly executed. Millions have been burned once; they won't let it happen again. Get to it!

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 20,000+ 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 2020 your best year yet!

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

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 and Lisa Feierstein. THANK YOU!

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