

# CULTURE + TRENDS<sup>2021</sup> REPORT

HAPPINESS

RESET



InSites Consulting

# A HAPPINESS RESET

## AN INTRODUCTION

Twenty-twenty; the year that marked the beginning of a new decade ultimately resulted in a re-evaluation of our lives, our futures and the world we live in.

At the center of this reset stood the global COVID-19 pandemic, but it was by no means the only causal factor. A string of wildfires, crop-eating locust swarms, a global resurgence of civil rights protests and continued political polarization marked the world in the shadow of a healthcare crisis.

The pandemic has acted as a catalyst for behavioral change, accelerating slow-moving macro trends as well as creating entirely new ones. While the impact on human behavior can easily be exaggerated, it is undeniable that we are going through a dramatic alteration that will be looked back on as culturally pivotal.

We could label 2020 as the new apocalypse. Yet, in the face of disaster, we also witnessed a revelation. The confinement of life in lockdown opened the door to new attitudes, behavior and values. 2020 not only forced us to stay inside, it also fundamentally changed how we seek and attain happiness. Leading to a fundamental 'happiness reset'.

So, what defines this post-2020 consumer, and what is the role for brands? This report uses our unique Human Drivers framework to capture how people are now seeking happiness and wellbeing, and how this is driving new behavior and expectations towards brands.

Kelly & Joeri





# WHAT TO FIND IN THIS REPORT

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# THE HOW BEHIND THE REPORT METHODOLOGY

There is no shortage of trend reports available. So, what makes this report different? Our unique approach combines a mix of methodologies to produce a unique view of the post-2020 consumer:



This supported by consultancy with our global advisory board, a network of culture-savvy researchers from our 16 offices around the globe.

## MACRO ENVIRONMENTAL ANALYSIS

Our research started with an exploration of the macro environment and the forces of change impacting human psychology and behavior.

## HUMAN DRIVERS MODEL

The engine of our approach is our proprietary Human Drivers model, which encompasses 7 universal drivers people seek to achieve happiness. Using our **proprietary Illume network of leading-edge consumers**, we captured how these are changing in response to the macro environment.

## QUANTIFIED CONSUMER TRENDS

This led to the identification of 14 'trends' or new and visible consumer behaviors, which have been quantified by 15,000 consumers in 16 markets.

## LEADING-EDGE CONSUMERS FROM OUR ILLUME NETWORK

Each phase involved a qualitative collaboration with leading-edge consumers from our Illume Network.

## QUANTIFYING TRENDS WITH 15,000 CONSUMERS

As researchers, we not only want understand which trends are shaping and manifesting around the world, but also how this happens.

Which trends are nascent, emerging, expanding or established? Are they more dominant towards younger generations, or are they growing throughout the wider population?

We quantified our 14 trends with 15,000 consumers from 16 market: Australia, Belgium, Brazil, China, Germany, France, Hong Kong SAR, Indonesia, South Korea, the Netherlands, Philippines, Republic of Singapore, Thailand, the United Kingdom, the United States of America, South Africa. This in field-partnership with Dynata.



# 2020

## A YEAR IN REVIEW





JANUARI

JAN 2020 – IRAN US TENSION: Iran fired missiles to US troops in retaliation for killing Iranian commander Qasem Soleimani.<sup>1</sup>



JAN 23, 2020 – WUHAN LOCKDOWN: the city of Wuhan is cut off from the rest of China to curb the spread of the COVID-19 virus.<sup>2</sup>



JAN 31, 2020 – BREXIT: the UK officially leaves the European Union.<sup>3</sup>



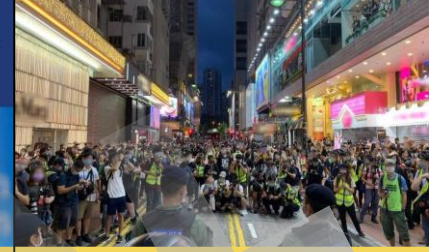
FEBRUARI

SEP 2019 - FEB 2020 – AUSTRALIAN BUSHFIRES killing nearly 3 billion animals.<sup>4</sup>



MARCH

MAR 11, 2020 – PANDEMIC: WHO declares the coronavirus outbreak a pandemic.<sup>5</sup>



MAR 2019 - SEP 2020 – HONG KONG PROTESTS: troubles in Hong Kong cause issues for the economy.<sup>6</sup>



MAR 2020 – BUSINESSES SHIFT FOR HEALTH: companies are shifting production to help keep people safe.<sup>7</sup>



APRIL

APR 20, 2020 – US OIL PRICES TUMBLE: oil prices go negative for the first time in history.<sup>8</sup>



APR 2020 – LOCKDOWN FUELS WILDLIFE: dolphins in the Bosphorus (normally busy marine route).<sup>9</sup>



MAY

MAY-OCT 2020 – BLM PROTESTS: wave of protests and riots after George Floyd's death.<sup>10</sup>



MAY 2020 – LIVESTREAMING IS OFFICAL JOB: with \$150 billion sales in 2020, China's Ministry of Human Resources officially recognizes title.<sup>11</sup>



MAY 2020 – INDIA CHINA DISPUTE: tensions erupt after border dispute between India and China.<sup>12</sup>



MAY 2020 – INVASION OF DESERT LOCUSTS, ruining crops and causing food insecurity for 19 million people in Kenya.<sup>13</sup>



MAY 2020 – US DENOUNCES WHO: President Donald Trump announces his intention to end U.S. relationship with WHO.<sup>14</sup>



JUNE

JUN 2020 – BARCELONA OPERA PLAYS FOR PLANTS: first concert after lockdown; plants were later donated to healthcare workers.<sup>15</sup>



JUN 2020 – GLOBAL WARMING SIGNS: temperatures in the Arctic Circle reach a scorching 38°C (100°F) causing wildfires.<sup>16</sup>



JUN 2020 – KOREAN WAVE IN GLOBAL POP CULTURE: BLACKPINK breaking record with 86.3 mio views first day.<sup>17</sup>



JULY

JUL 2020 – FLOODS IN CHINA: the result of weeks of heavy rain and affecting over 38 million people.<sup>18</sup>

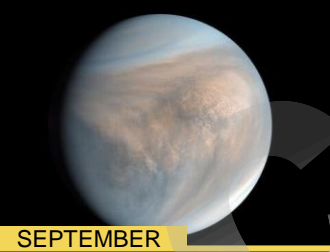


AUGUST

AUG-SEP 2020 – POLAND LGBT PROTESTS: after part of country passed resolution declaring to be free of LGBT ideology.<sup>19</sup>



AUG 2020 – BASIC INCOME EXPERIMENT IN GERMANY: 120 people get 1200 euros per month for three years.<sup>20</sup>



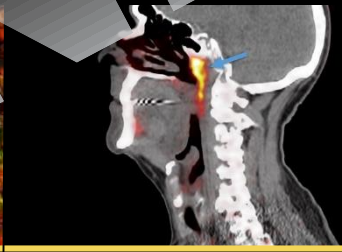
SEPTEMBER

SEP 2020 – POSSIBLE SIGNS OF LIFE ON VENUS after scientists detect the presence of phosphine.<sup>21</sup>



OCTOBER

OCT 2020 – CORALS KILLED BY CLIMATE CHANGE RETURN TO LIFE: scientists discovered unique survival strategy by corals to recolonize when conditions are better.<sup>22</sup>



OCT 2020 – SCIENTISTS DISCOVER NEW ORGAN in our head called 'tubarial salivary glands'.<sup>23</sup>



OCT 2020 – THAILAND PROTESTS for greater democracy using three-fingered salute from 'The Hunger Games' as symbol of resistance.<sup>24</sup>



NOVEMBER

NOV 9, 2020 – Global stock markets surge after Pfizer COVID-19 vaccine news.<sup>25</sup>



NOV 11, 2020 – ALIBABA SINGLES DAY RECORD: reaching record levels of over \$74 billion in 24 hours, indicating demand is bouncing back in China after coronavirus.<sup>26</sup>



DECEMBER

DECEMBER 2020 – after months of dispute, US electoral college officially confirms Biden's victory.<sup>27</sup>



# HEALTH

## *Crisis in confidence*

'Covid will not kill you as fast as a bullet':  
Black doctors go from frontlines of  
pandemic to protests



COVID-19 has killed black people at twice the rate  
of their white counterparts - while police kill twice as  
many black men as they do white men.

Source: *The Guardian*

India's cleaner lockdown air could save  
650,000 lives

Shutdown of industry has led to a huge improvement in air quality, study finds



Pollution hanging over New Delhi's India Gate before -  
and clear skies after - the lockdown. Source: *The Telegraph*



Workers making face masks at a lingerie factory in  
Bangkok. Source: *The New York Times*

## Global health systems have been shaken, showing we are only as strong as our weakest link

Threats to public health such as obesity, air pollution or  
loneliness have been growing, yet COVID-19 shocked  
nations into action.

Health and resilience being key priorities for governments  
around the world, the World Health Organization is guiding  
these aims, with 'strengthening resilience' being a core  
pillar for its 2020 planning.

Industries are pivoting to meet consumer demand for a  
health-driven society, and the impact will far outlast the  
virus itself.

Like finance in the '00s and technology in the '10s, **health**  
**will dominate the '20s.**



# POLITICAL

*Converging on authority*

## ***Black Lives Matter Grows as Movement While Facing New Challenges***

Demonstrations against police shootings and a March on Washington on Friday reflect a cause more enduring than many predicted.



Analysts say the Black Lives Matter movement could take on a years-long trajectory, much like the civil rights movement and the protests against the Vietnam War. *Source: The New York Times*



The danger in the coronavirus recovery will be inertia.

*By Philip Stephens, Financial Times*

GLOBAL *The Atlantic*  
**Populism Is Morphing in Insidious Ways**  
The political movement defined democracies around the globe in the 2010s. It's not going anywhere.  
YASMEEN SERHAN JANUARY 6, 2020



"Western Liberalism has become obsolete and liberals can no longer dictate their ideals on everyone else."

Putin 06/19 *Source: Financial Times*

**We can no longer ignore the broken systems we depend on; we must fight for real change**

Who holds authority and influence in society has been shifting for years, resulting in **political polarization across the globe**.

The crisis has highlighted **systemic failures in our political processes**. It provided not only an anchor for all social suffering, but also the time and space to reassess and go out to fight for what is right.

Signs of a new perspective have been highlighted by a collective, conscious voice, leveraged through protests around the world.

Working together in the future means reconciling the past and investing in all communities.

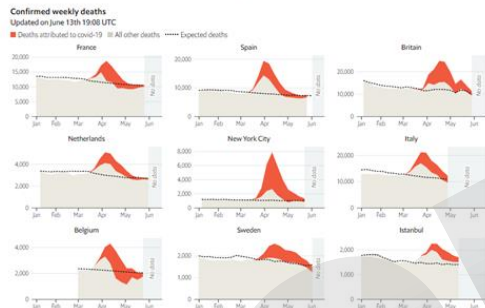


# ECONOMIC

*Reframing entitlement*

## On the Economics of Not Dying

What good is increasing G.D.P. if it kills you?



Source: The New York Times

The Great Lockdown: Worst Economic Downturn Since the Great Depression



The global economy is expected to shrink by 5.2% in 2020 due to the COVID-19 pandemic. Source: IMF



Impact of COVID-19 on commodity markets heaviest on energy prices; lower oil demand likely to persist beyond 2021. Source: Worldbank

**We learned the value equation of our lives; we are entering a new recession**

Having barely recovered from the last recession, the global economy is on the cusp of a much deeper one.

The biggest debate for governments around the world is **how to reconcile the need to protect the population without causing long-lasting harm to the economy.**

The pandemic has made us painfully **aware of the value equation of our lives** in terms of how much we are entitled to earn to live, and how dependent systems are on the money we spend.

The fragility of supply chains visualizes consumer misconceptions of 'limitless' and 'infinite' resources.

We must reframe our perspectives beyond the individual consumer and more towards maintaining the society as a whole.



# SOCIAL

## *Self-sufficient networks*

Coronavirus forces Europe to confront China dependency



Disruption across sectors amplifies calls in Europe and beyond to grow less reliant on China.

Source: Politico

Supermarket supply chains laid bare: why empty shelves were only the start

Where does your food come from and how will it be affected by coronavirus?



The fragility of our food and drinks supply chains has been laid bare by the coronavirus pandemic. Source: Which?

**Social Distancing Has Become the Norm. What Have We Learned?**



Source: Wired

## Having learnt a hard lesson about our dependency on global networks, focus will shift to local community

The breakdown of global supply chains exposed a dependency on imported goods. The concept of the 'global consumer' has unraveled as supply lines were cut, flights grounded, and borders closed.

Countries can no longer be dependent on others to thrive. The **need to be self-sufficient will spread from national infrastructure to community networks** as we attempt to restructure the supply lines that matter to us most.

As individuals, the way we connect with each other has splintered.

There will be an active assessment of who we depend on, and how sustainable that is.



# TECHNOLOGY

## *Mandatory compliance*

Green or red light: China coronavirus app is ticket to everywhere



A woman uses a phone app to scan a code required to prove her health and travel status before being allowed to enter a shopping mall in Beijing on May 2. Source: The Japan Times



Police around the world enforce lockdown rules with drones and use anti-terrorist procedures to track and trace potential COVID-19 hotspots. Many question whether authorities are going too far. Source: Sky

## As life was forced online, technology became a virtual utility, demanding increased accountability

The debate around the role of technology, the role of privacy and our digital rights has been superseded by increased physical threats to our health and environment.

With the mass migration from real life to the digital world, the choice of opt-in is gone. As digital services have proven to be essential, they've shifted from tools to utilities. There will be a more unified voice for demanding better accountability from these essential services.

Re-engaging with the real world won't just be about safety and regulation, but about innovation and pushing the boundary of how technology can be woven into everyday life purposefully.

The increased dependency on tech has highlighted and widened the poverty gap in society, demanding new levels of accessibility.



# ENVIRONMENT

*Intrinsic to everything*

## How the coronavirus has impacted climate change – for good and bad

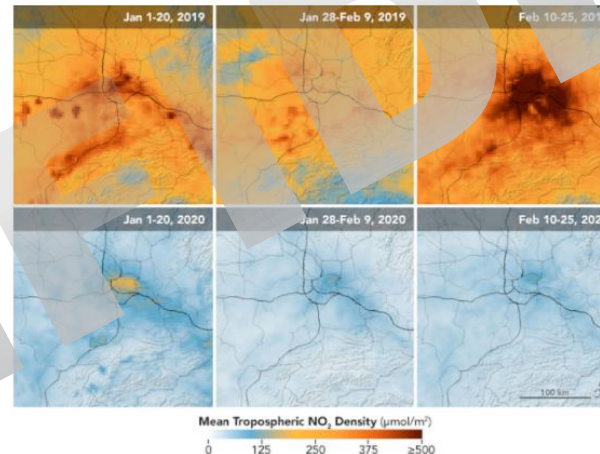
Global warming has become a forgotten crisis during the coronavirus pandemic. But a year that has set worrying climate records also shows how we can remake the world for the better



## The Coronavirus Outbreak Is Curbing China's CO<sub>2</sub> Emissions

An energy analyst describes his efforts to track trends in China's emissions during the pandemic

By Maria Gallucci



Images: NASA Earth Observatory

Pollution-monitoring satellites detected significant decreases in nitrogen dioxide (NO<sub>2</sub>) over China from 1 January to 25 February 2020.

Source: Spectrum

**Eco-priorities will be a tough sell, but essential to our survival; health and environment must go hand in hand**

Environmental concerns dominated the news in 2019, with the UN stating we have 12 years left to save the planet, and Greta Thunberg named Time's 'Person of the Year'. While the environment has benefited from deserted streets and lockdown 'ghost towns', our diverted attention allowed many to take advantage of (un)protected areas.

The mainstream coverage of these issues may have disappeared, the consumers' care and passion has not. The confinement of life has fueled our appreciation of the surrounding nature.

Having witnessed the devastating effect of eco-concerns and the direct impact on health and economy, the environment is seen as a core component of any future proposal.



# LEGAL

## *Moral frameworks*

Addressing the BLM movement, Obama thanks protesters for their action and encourages the ideals of voting AND civil disobedience to effect positive change. Source: *The Guardian*



▲ Barack Obama: 'You matter, your lives matter, your dreams matter' - video



A Molotov cocktail explodes in front of a French gendarme during a demonstration of the yellow-vest movement in Nantes, France.

Source: *World Economic forum*



Many of the catalysts in the 2019 protests were originally small. In Lebanon, a tax on WhatsApp usage spawned weeks of anti-government protests in Beirut and across the country in October. Source: *Bloomberg*

## Rules are being broken while people sacrifice for the greater good; the law is often misaligned with our own morality

Civil disorder was on the increase around the world as people responded to social inequality.

During the chaos caused by civil unrest, a legal vacuum emerged. Those willing and able to capitalize on the crisis have made unprecedented moves to consolidate power and make profits.

Consumers worldwide were instructed to act selflessly for the greater good, while being forced to watch others break the rules for their own personal benefit. Questioning the imposed measures, many opted to trust their own moral frameworks instead.

Fueled by moral values, populations around the world are ready to fight for change.



# AT A GLANCE: EMERGING MACRO ENVIRONMENT

HEALTH	POLITICS	ECONOMY	SOCIAL	TECHNOLOGY	ENVIRONMENT	LEGAL
<b>Global pandemic</b>  +82 million infected +1.8 million deaths <sup>28</sup>	<b>Global unrest</b>  100,000s protested for social equality and human rights on nearly every continent	<b>Global recession</b>  The pandemic took \$6.7 trillion from the global economy, resulting in the deepest recession since WWII <sup>29</sup>	<b>Global withdrawal</b>  Global trade has fallen by 5-9% in 2020, hitting almost every sector <sup>30</sup>	<b>Global digitization</b>  Global internet broadband data usage increased by 47% <sup>31</sup>	<b>Global reprieve</b>  Global emissions decreased by 40% during the first lockdown <sup>32</sup>	<b>Global orders</b>  In April 2020, 3.9 billion people in more than 90 countries were ordered or advised to stay at home <sup>33</sup>
<i>Global health systems have been shaken, showing we are only as strong as our weakest link</i>	<i>The crisis highlighted systemic failures in our political processes</i>	<i>The pandemic has made us painfully aware of the value equation of our lives</i>	<i>Our dependency on global networks has been revealed</i>	<i>As life was forced online, technology became a virtual utility</i>	<i>The confinement of life has fueled the appreciation for the surrounding nature</i>	<i>Civil disorder grew around the world as people responded to social inequality</i>
<b>Health &amp; resilience are key priorities</b>	<b>People are fighting for change</b>	<b>Consumers learned to be told 'no'</b>	<b>The focus will shift to local community</b>	<b>Demand for accountability</b>	<b>Health &amp; environment go hand in hand</b>	<b>Breaking systems to fix them</b>



# HAPPINESS RESET

THE IMPACT OF A WORLD IN TURMOIL  
ON THE 7 WELLBEING DRIVERS



There have been many attempts throughout history to explain human motivation. Since ancient times, philosophers like Aristotle have argued that people seek to attain a happy and tranquil life, with the aim of maximizing their wellbeing. People are on a continuous quest to achieve happiness, and every action we take is an attempt to make us happy.

Building on centuries of philosophical observation and decades of scientific exploration, Positive Psychology shows us that there are seven universal drivers which we seek to satisfy in order to achieve happiness and wellbeing. And while their core remains unchanged, the way this is manifested in our behavior is influenced by the world around us.

**2020 NOT ONLY FORCED US TO STAY INSIDE, IT ALSO FUNDAMENTALLY CHANGED HOW WE SEEK AND ATTAIN HAPPINESS THROUGH THESE 7 DRIVERS, FOSTERING A 'HAPPINESS RESET'**



MEANING



RE-EDUCATION  
TO FIND  
MEANING



RELATIONSHIPS



CRAFTING  
NEW 'FAMILY'  
STRUCTURES



ACHIEVEMENT



RITUALS  
FOR  
RESILIENCE



ENGAGEMENT



MOMENTS  
OF DEEP  
FASCINATION



POSITIVE  
EMOTIONS



FIGHT  
NEGATIVITY



HEALTH



SIMPLER  
WAYS TO FEEL  
HEALTHY



SECURITY



COMPETENCE  
AND COMPASSION  
AS TRUST  
BENCHMARKS





# MEANING

our reason for being

The 2020 'apocalypse' moment led to a **re-evaluation of our perspectives and roles**. The lockdown gave people a moment to reflect on what to do next; it created a 'crisis of meaning'.

## RE-EDUCATION TO FIND MEANING

A more **knowledge-focused approach to attaining meaning in life** is emerging across the world.

Beyond 'wokeness', this is about re-visiting one's sense of identity and position with a lens of re-education.



# RE-EDUCATION TO FIND MEANING



Catalyzed by the BLM movement, statues of racially problematic and colonial historical figures have been torn down and questioned across the world.<sup>34</sup>



Malcolm X - Make It Plain (Full PBS Documentary)

*"I've been using a lot of my free time to educate myself on race relations in America, particularly reading/watching stories of the history of the Civil Rights Movement in order to get a broader context of the situation."* Nathan, US\*

## Re-education x Inclusivity North America / Europe

Educating oneself and others on issues like race, cultural appropriation and gender

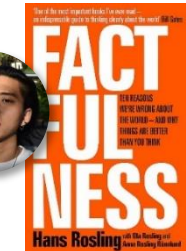


*"I love this because it links pop culture to Victorianism, is super feminist and reminds to not 'hide' my feelings."* Susanne, Germany\*



## Re-education x Harmony South East Asia

Re-establishing societal and personal harmony



*"My uncle gave this book and I find it very revealing - it makes you realize the world is not quite as bad as we are told."* Hyunchoye, South Korea\*



## Re-education x Next-gen empowerment Africa

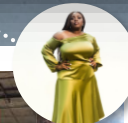
Keeping the past front-of-mind so everyone takes responsibility for the next generation's happiness

## Re-education x Stabilization South America

In nations like Brazil, fear of violence and political upheaval is creating demand for more peaceful and considered approaches to life



*"The Mural of the 200 Chibok girls kidnapped in 2014 reminds us of the country's insecurity, failed governance, but hope for a better tomorrow."* Carol, Nigeria\*



*"As I am on my way to reconnecting with my inner voice, I realize I am going back to my childhood. We adults have been trained to be a 'good person' with 'good manners' in Japan, and we have many issues like overworking, depression and suicide. I hope people reconnect with their inner child as well."* Yukari, Japan\*





# RELATIONSHIPS

our connection to others

Fueled by lockdown measures, our immediate relationships have intensified, while others have been pushed away. This has triggered a **re-focusing on the family and close ties as an essential source of belonging**, connection and comfort.

## CRAFTING NEW 'FAMILY' STRUCTURES

The **concept of 'chosen' families will gain traction**, where people craft their own family structures (including a prominent role for pets). This results out of both necessity (loneliness, single households) and the growing belief that we do not have to do the things we have always done before.



# CRAFTING NEW 'FAMILY' STRUCTURES



Some 30 million European adults (7%) frequently feel lonely; this number is as high as 10% in Hungary, the Czech Republic, Italy, Poland, France and Greece.<sup>35</sup>

*"I believe you can only help others once you've helped yourself."* Danielle, US\*



## Family x The self North America

Individualist culture means the self is still more important than collective needs - there is the perception that you need to be your best self in order to help others



Neighborhood apps like 'NextDoor' growing exponentially across Europe

## Family x Community Europe

Neighborhood and local community have become more important



*"I have been keeping an eye on my local hairdressers to make sure they're doing okay. I've also been paying a membership to my local arts center, even though it's closed right now. I want to support them."*  
Hanne, the Netherlands\*

## Family x Empathy Asia

Generational relationships becoming less hierarchical and more interdependent and empathetic. Also bringing more furry friends into the family!



*"I have been teaching my grandfather English, and we've ended up having lots of new conversations we wouldn't have had before. It feels much more like a two-way relationship now, he realizes I can help him too."*  
Amber, China\*

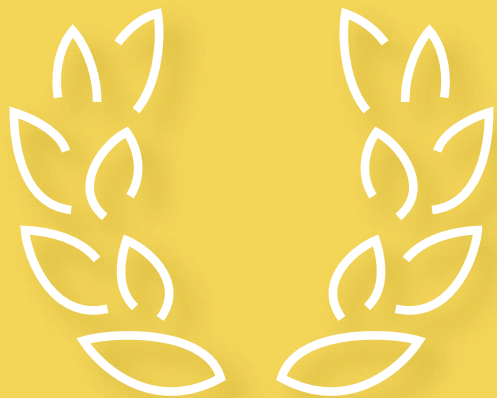


Ossan Rental is a 'rent a family' service in Japan that allows elderly or lonely individuals to get emotional support from people, beyond the role of a carer



*"I would like to have a pet cat; it can really help release pressure [from my life] and enjoy some company."*  
Guangxin, China\*





# ACHIEVEMENT

our drive to accomplish

The pandemic has served as a period of reflection, with people **exploring different ways to structure their routines** in order to get done what they need, avoid unnecessary anxiety, and feel good about their accomplishments in the process.

## RITUALS FOR RESILIENCE

People will continue to evaluate how they are spending their time; **crafting of new rituals and routines that deliver stability and resilience** in a fragile and changeable macro context.



# RITUALS FOR RESILIENCE



*"Upcycling and DIYing are some of my new passions."*  
Susanne, Germany\*



Looking for ways to keep your team engaged and motivated?



*"At my company WE SAY HEJ we facilitated workshops remotely and found how the skills that people normally call 'soft skills' are becoming even more important. We now call communication, flexibility, and resilience hard skills."*  
Hanne, the Netherlands\*



*"A quote I live by, I feel it is imperative to live by this quote to be productive"*  
Danielle, US\*



## Rituals x Forming habits Europe / North America

Rise of habit-forming apps and tools to help us spend our time more wisely, rather than worrying about cramming everything in

## Rituals x Small acts of self-kindness Asia

Mindful of long hours and lack of time for anything else, people are *gradually* looking for opportunities to reconfigure their time, and make small changes that make them feel better overall



*"I've started buying myself flowers online every week. Since nobody else will buy me flowers, not knowing what I will receive makes me feel like getting a gift from someone else."* Amber, China\*



## Rituals x Smaller goals South America

In cultures that are normally highly competitive and full of dynamism, the pandemic has encouraged people to find *smaller* and more controlled ways of accessing achievement, such as drawing, reading and writing



*"Recently I've been feeling the urge to access my artistic senses, so I've decided to start drawing random images every night before I go to sleep. This new habit has been teaching me some life lessons such as patience and perseverance."* Ana, Brazil\*



*"One of the markers of my movement towards a healthier adulthood is the way I define achievement, moving away from hustle culture and focusing on doing things like the 100-day project - I've committed to making art every day for 100 days in order to build resilience, creativity and consistency."* Hana, UK\*





# ENGAGEMENT

our access flow

The great pause of 2020 made it okay to slow down, pay attention to our environment and **engage in low-key activities**; it also highlighted the limitations of digital for delivering truly engaging experiences.

## MOMENTS OF DEEP FASCINATION

Inspired by the psychological benefits and personal space experienced during the pandemic, people will increasingly **seek moments of deep fascination, sensory engagement and 'flow' in their everyday lives.**



# MOMENTS OF DEEP FASCINATION



With lower pollution levels revealing clearer night skies, local stargazing has witnessed a surge in engagement; one leading UK astronomy equipment supplier saw its sales rise 50% in April 2020.<sup>36</sup>

## Fascination x Wellness North America

Leaning into mindful wellbeing activities that offer sensory stimulation



*"I've attended one sound bath and it's really moving. It's something I'd love to continue to attend so I can see the benefits on my mental self."*  
Danielle, US\*

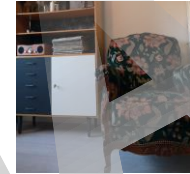


## Fascination x Making Global

Making and fixing things at home to drive feelings of physical engagement



*"I've got super into DIY - this is a chair I reupholstered myself!"*  
Susanne, Germany\*

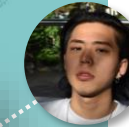


*"This is one of the many digital art festivals that have been happening lately. It's cool to see how creative they are to make them work online, but personally I miss this real thing."*  
Hyunchye, South Korea\*



## Fascination x Digital Asia

More open to digital-driven immersive experiences



*"Since I had to stop running due to the outbreak, I had to find some other stuff to keep myself busy. So, I got addicted to a mobile game called PUBG. I felt like I was able to relieve my stress in this game."* Alper, Turkey\*



The wanderthenight website features footage from different cities and an ambient soundtrack meant to simulate walking around the city at night.





# POSITIVE EMOTIONS

our expression of pleasure

The world being physically and morally restricted has **raised levels of anxiety and depression**. Blocking out negativity and letting off steam are essential for our overall health.

FIGHT

NEGATIVITY

On a quest to block out the relentless bad-news cycle, people will proactively **seek out moments of positivity wherever possible** in order to protect their mental wellbeing.



# FIGHT NEGATIVITY



i-D magazine's coronavirus good-news bulletin.<sup>37</sup>

## Positive emotions x Rebellion North America / Europe

Underground parties/ rebellious groups become counterculture movements during pandemic e.g. COVID hook-ups, raves

## Fighting negativity x Positive affirmation narratives North America / Europe

Start-ups and social-media influencers drive positive narratives online, encouraging people to reframe their situation as an opportunity

## Positive emotions x Conformity Asia

More nervous about breaking rules, there is a greater societal pressure to conform in markets like Korea, China and Japan



Positivity and joy have been core to TikTok's success as a platform in recent years; many users 'manifest' their desired lifestyles and goals on the platform via creative videos

*"There is a thrill that comes from being unlawful but it's mainly about social connections. My joy and pleasure comes from my friendships and social connections which have been so important throughout lockdown and beyond."* Carol, Nigeria\*

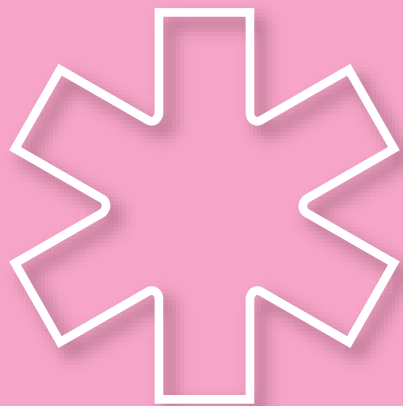


*"This year my friend founded her business 'Fear is Overated' - it's all about coaching people into being open about their feelings so they can have more positive experiences"* Hanne, the Netherlands\*



*"People will shame you for breaking the rules, so you have to be careful not to be irresponsible"* Hyunchye, South Korea\*





# HEALTH

our pursuit of improvement

The global COVID-19 crisis has demonstrated the stark **health vulnerabilities in our society**.

Health has become the number-one priority.

## SIMPLER WAYS TO FEEL HEALTHY

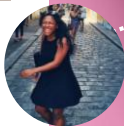
People will increasingly look to strip back the layers and **create healthier habits, lifestyles and environments** that feel instinctively good for us, because of their **simplicity and purity**.



# SIMPLER WAYS TO FEEL HEALTHY



*"Pause is a great company that combines mental, emotional, and physical all into one. This float tank is one way to achieve experiencing those three things."* Danielle, US\*



## Simpler health x Water as healer Global

Taking more baths, swimming, and water-based skin rituals to drive feelings of calm



## Health x Plants Global

Rise of indoor plants accelerated by COVID-19



*"I started learning hang drum which I had always wanted to try after getting bored of staying at home during the pandemic. I love how I can just drum my heart out and sing along without having to read music sheets. It's been a liberating ritual for my body and mind."* Yukari, Japan\*

## Simpler health x Daily strengthening Global

People look for ways to integrate better mental wellbeing into their daily lives

## Health x Rural retreats Global

Urbanites move to the countryside, people realizing the negatives of city life

## Simpler health x Primal rituals Global

Ancient or traditional activities that are tech-free and foster wellbeing

How to Change the Way We Live, Love, Parent, and Work

## I Thought It Was Just Me



WOMEN RECLAIMING  
POWER AND COURAGE  
in a  
CULTURE OF SHAME

Brené Brown, Ph.D., L.M.S.W.

*"While I clean, cook, or do other chores, I tend to listen to audiobooks and podcasts. I feel less restless and bored whilst doing chores and gain some insight into my emotional health."*

Hana, UK\*



*"Young people are buying plots in the mountains and by lakes so they can spend time outdoors. Even if they don't build anything there, it's just to enjoy it."* Alper, Turkey\*





# SECURITY

our sense of safety

Due to the **cracks in our financial, political, social and health systems**, worry has become part of daily life. With fake news on the rise, trust is at an all-time low.

## COMPETENCE & COMPASSION AS TRUST BENCHMARKS

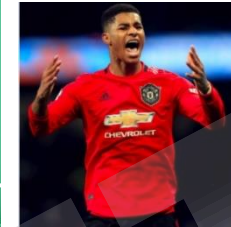
A greater focus on **competence and compassion as desired qualities in leadership**. Going beyond 'speaking out' and vague promises, people will increasingly expect individuals, brands and businesses to create practical, workable solutions to insecurity issues.



# COMPETENCE & COMPASSION AS TRUST BENCHMARKS

*"Things are very unstable right now. We have a duty to keep pursuing what's right."*

Nathan, US\*



Marcus Rashford, Manchester United football player, fighting the government on food poverty.<sup>39</sup>



Paris Hilton - reality TV star has exposed major abuses at schools across the US in recent campaign.<sup>38</sup>

## Competence x Division North America

The United States are more divided than ever as bipartisan perspectives collide in election year

## Security x Equilibrium China

Focus on reinstating the equilibrium and harmony to drive security, rather than striving for major change

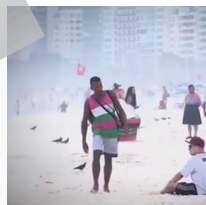
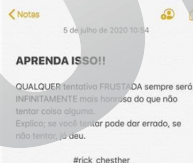


*"It is important that society works together - hierarchy is not a bad thing if everyone has their place and it works."* Guangxin, China\*

## Compassion x Influencers Global

Celebrities and artists are increasingly using their platforms and personal experiences to drive societal change

*"Someone I admire is Rick Chester. He was a typical marginalized Brazilian who was selling water bottles on the beach because he was unemployed. I think he is inspiring because he empowers the reality of Brazilian society rather than promoting unhealthy and utopic aspirations."* Ana, Brazil\*



*"Rap Against Dictatorship is a group of rappers that makes music criticizing social and political issues. Music Video of their song 'Prathet Ku Mee' (My Country's Got...) depicts a scene from the 1976 student massacre in Bangkok. The song went viral and sparked a new wave of political active youths."* Krittin, Thailand\*



New Zealand's Jacinda Arden has been praised for her handling of the COVID-19 pandemic, with commenters noting her relentless focus on public health.<sup>40</sup>



# POST-2020 CONSUMER

## 14 EMERGING CONSUMER TRENDS





# MIND

NEW WAYS TO FREE OUR MINDS  
AND DEVELOP OURSELVES

01. LIFE COACH



02. DIY EVERYTHING



03. ATTENTIVE EXPERIENCES



04. WILD & WEIRD



05. RE-IMAGINED INTERACTIONS



06. SENTIMENTAL OPTIMISM



# BODY

PROTECTING AND CELEBRATING  
OUR PHYSICAL SELVES

07. NURTURING NATURE



08. FIGHT FOR IMMUNITY



09. DESIGNING FOR RESILIENCE



10. AT-HOME PLEASURE



11. REBUILDING TRUST



# SOUL

SEEKING ESSENCE THROUGH  
PEACE AND PURPOSE

12. DISENTANGLING TABOOS



13. UNAPOLOGETIC ACTIVISM



14. NEIGHBORLY NETWORKS





# MIND

//New ways to free our  
minds and develop





ACHIEVEMENT

+



ENGAGEMENT

01

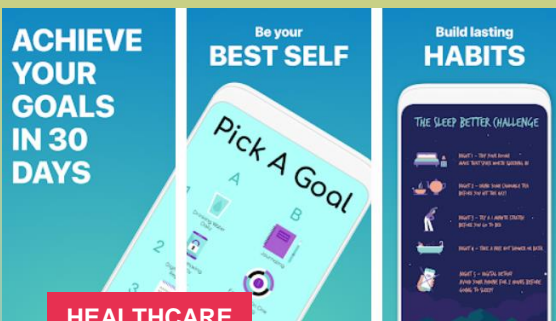
# LIFE COACH

Consumers are turning to personal projects, rituals and routines that offer a sense of control and stability in a changeable world. There is a role for brands that coach rather than preach by offering tools to support individual goals and promote positive behavior change. Brands that easily fit into everyday rituals will form part of consumers' long-term routines.



### HEALTHCARE

Finc is Japan's number-one wellbeing app; it has been designed to use AI and gamification techniques to help people stay engaged and on track. Usership has grown significantly during the pandemic.



### HEALTHCARE

Billed as 'not your average habit tracker', **Fabulous** is a science-based app that promises to "motivate you to improve your fitness and achieve your weight loss goals, reboot your sleep cycle, and discover mindfulness to reduce your anxiety".

### FINANCE

New start-up **Millie** is a US multiplatform personal finance brand which helps young women better understand and manage their finances.



### INSURANCE

Pan African insurance firm **Old Mutual** provides financial education, tools and courses to improve a user's financial situation and achieve financial goals in a fun, interactive way.

### WHAT ABOUT NEXTGEN?

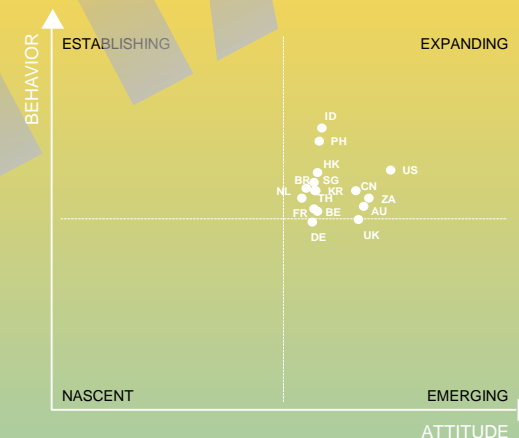
*By Joeri Van den Bergh, NextGen expert*

The oldest Gen Zers are entering the workforce in very uncertain times. Many are worried about finding a job that matches their skills. While self-reflection made them question job paths and career goals, Gen Z is now turning to brands to help shape a more sustainable and better future for them. More meaningful brands will help them rebalance to more purposeful hobbies, jobs and relationships.

GLOBAL\* TREND SCORE 81%

NEXTGEN TREND SCORE 86%

### TREND MAPPING



### SECTOR PLAYING FIELD

25% FINANCE

20% CONSUMER ELECTRONICS

17% RETAIL & LEISURE

23% NO SECTOR

\*including the 16 markets from this research





ACHIEVEMENT

+



ENGAGEMENT

02

# DIY EVERYTHING

The desire for individuality and shift towards sustainable living is driving the uptake of do-it-yourself formats. This creates opportunities for brands to offer platforms and solutions that inspire consumers to creatively express themselves on their own terms through maker collaborations, DIY recipes, self-serve apps and cross-category competitions that tap into DIY entrepreneurship.



### FOOD & BEVERAGE

Dublin zero-waste store **Reuzi** sells Grow Your Own Cocktail kits.



### RETAIL

In South Africa, homeware store **Leroy Merlin** used Facebook to post quick DIY projects for customers to use up leftover materials and create their own designs at a budget.

### WHAT ABOUT NEXTGEN?

By Joeri Van den Bergh, NextGen expert

To provide themselves with structure and distractions, many Gen Zers actively looked for daily activities, including even the once abhorred household chores or walking the dog. To escape boredom, they looked for new hobbies and crafts - weapons of mass distraction. Although some of these were new - learning a different language, cooking or coding courses - most were in line with their interests or identity.

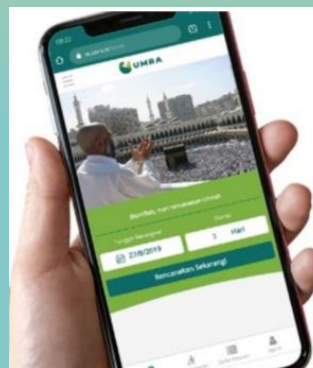
### PERSONAL CARE

Spanish plant-based skincare brand **Rowse** has a range of 'raw ingredient' products such as avocado, argon and hemp. The website showcases DIY recipes and sells ceramic equipment for mixing at home.



### RETAIL

Tapping into Gen Z's love for social-media challenges, sustainable UK brand **Raeburn** partnered with **Depop** to offer a free reversible bucket hat in return for a social-media post of the design.



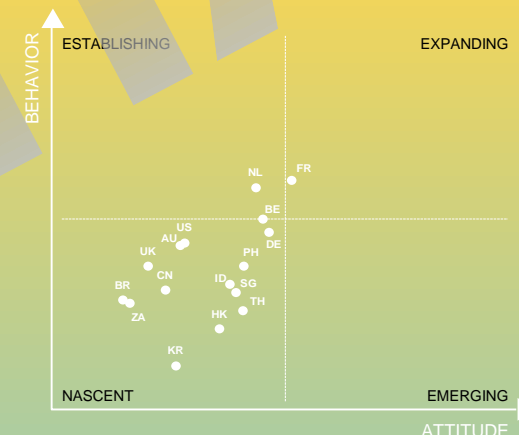
### TRAVEL & TOURISM

After eased restrictions on Umrah visas, **Umrah.id** became Indonesia's first DIY Umrah app appealing to the country's growing demographic of young Muslim travelers.

GLOBAL\* TREND SCORE 61%

NEXTGEN TREND SCORE 65%

### TREND MAPPING



### SECTOR PLAYING FIELD

35% HOME IMPROVEMENT

21% FASHION

21% GROCERIES

23% NO SECTOR





POSITIVE  
EMOTIONS

+



ENGAGEMENT

03

# ATTENTIVE EXPERIENCES

Consumers are craving slow moments that allow them to reach 'flow' and escape from their everyday lives. Both online and offline, brands can offer immersive experiences that connect with consumers in new ways, allowing for full engagement in the present moment.



### TRAVEL & TOURISM

After being closed temporarily, **Arima** - Japan's famous hot-spring destination - launched a virtual reality experience to stimulate soaking in an 'onsen' (hot-spring bath) with an ASMR mix of birdsong, running water and a gentle breeze to immerse the senses.



### MEDIA & ENTERTAINMENT

Social gaming platform **Roblox** & global YouTube kids channel **Ryan's World** will launch a virtual space of activities that emulate real life, like meeting with friends and window shopping.

### TRAVEL & TOURISM

South African luxury tour company **Andbeyond** hosts private guided game drives remotely, with an expert that shares an educational deep dive into the animal sightings and allows viewers to feel closer to nature.



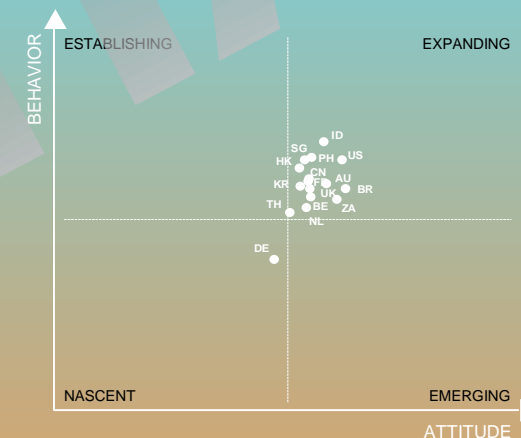
### RETAIL

**Lego Botanical** has launched a 750-piece series consisting of intricate, colorful flower bouquets and small bonsai trees to help stressed-out adults to zone in on calming play.

GLOBAL\* TREND SCORE 78%

NEXTGEN TREND SCORE 83%

### TREND MAPPING



### SECTOR PLAYING FIELD

23% CONSUMER ELECTRONICS

19% MEDIA & ENTERTAINMENT

17% FINANCE & INSURANCE

25% NO SECTOR





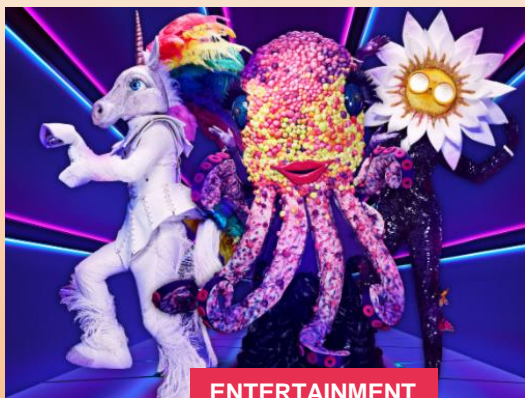
POSITIVE  
EMOTIONS

04

## WILD & WEIRD

Consumers are consciously creating time for spontaneous, silly moments to fight the relentless cycle of negativity in the world. Brands that inject playfulness and fun into consumers' lives by embracing digitally-driven satire, social-media challenges and celebrating the weird and wonderful in their campaigns will be valued. It's about daring to be different!





### ENTERTAINMENT

Originating in Korea, talent show **The Masked Singer** has been an international hit, featuring celebrities performing in unusual costume guises.

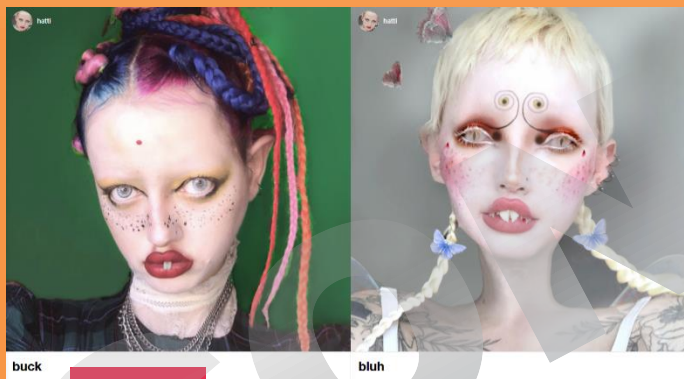
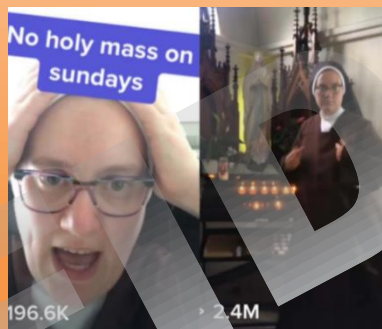
### TELECOMMS X MEDIA

**Three Mobile** partnered with **LADBible** for its Relaxing Stuff campaign. For its 2019 Christmas ad, '90s boyband East 17 were sound-tracked by ASMR whispering in the form of fake snow, sleigh bells and chocolate wrappers.



### MEDIA & ENTERTAINMENT

**TikTok** has become a hotbed for wild and weird performances worldwide such as 'Nuntok'.



### BEAUTY

**My Beauty Brand** embraces otherworldliness imagery and conventionally 'weird' or unusual looks as a point of pride.

## WHAT ABOUT NEXTGEN?

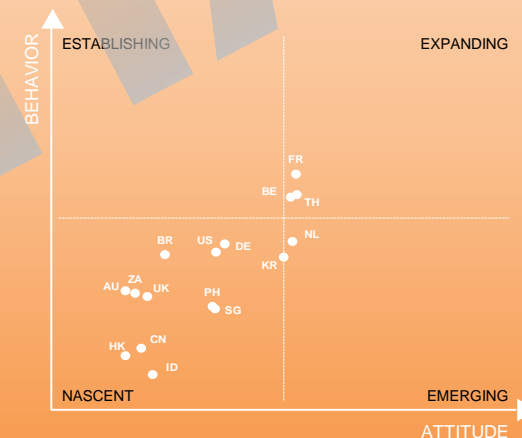
By Joeri Van den Bergh, NextGen expert

Gen Z counterbalanced the 2020 negative-news magnet by focusing on positive social media (like TikTok), avoiding trolls, bullying and fake news. They love brands but are looking for authentic real people with relevant content. COVID-19 created an opportunity for Gen Z to discover new 'curators of cool', a different type of hero far away from glamorous celebrities: essential workers, scientists and entrepreneurs,...

GLOBAL\* TREND SCORE 63%

NEXTGEN TREND SCORE 71%

## TREND MAPPING



## SECTOR PLAYING FIELD

28% MEDIA & ENTERTAINMENT

23% FASHION

18% CONSUMER ELECTRONICS

25% NO SECTOR





RELATIONSHIPS

+

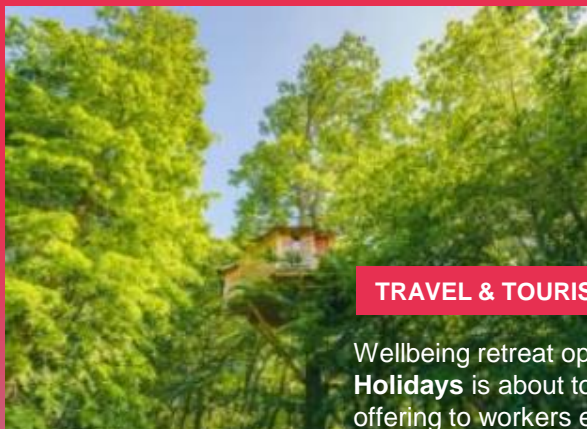


ENGAGEMENT

05

# RE-IMAGINED INTERACTIONS

From the rapid rise in home working to the adoption of online appointments, the way people interact is changing moving forward. For future relevance, brands should show how they are uniquely positioned to become part of consumers' new working and social lifestyles, with tools and spaces designed to keep people connected.



### TRAVEL & TOURISM

Wellbeing retreat operator **Balance Holidays** is about to expand its offering to workers eager for a change of scenery, putting on early-morning, evening and weekend classes as part of its curated working packaging to achieve a work-life balance.

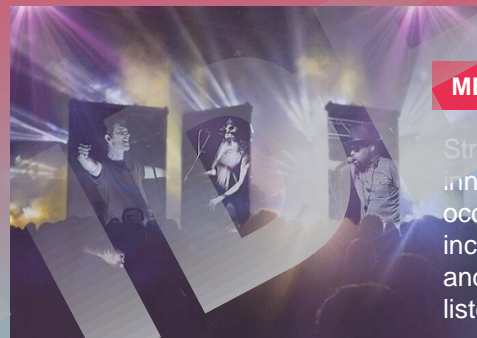
### PET RETAIL

US pet retailer **Petco** supports the digital adoption process with remote training services. New owners can attend Instagram live streams to ask vets about indoor exercising for dogs, or helping pets adapt to new environments.



### HEALTHCARE

Thai banking brand SCB sponsored healthcare sub-brand **Doctor A-to-Z**, an app that offers virtual consultations with medical professionals.



### MEDIA & ENTERTAINMENT

Streaming platform **Rippla** is innovating to meet changing occasions, with online features including artist VIP chat rooms and tips jars - connecting listener and artist in new ways.

## WHAT ABOUT NEXTGEN?

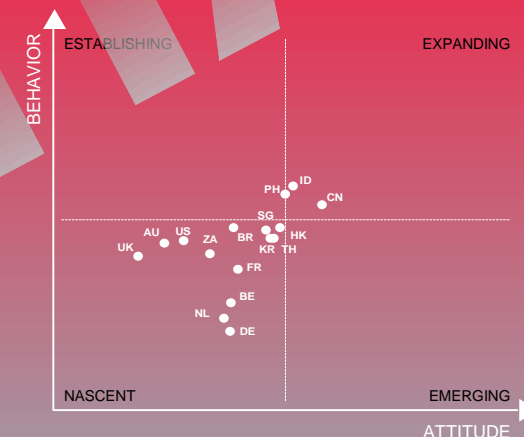
By Joeri Van den Bergh, *NextGen expert*

Gen Z, dubbed as 'digital natives', has never craved for face-to-face interactions as much as today. Weirdly, they have now learned to value in-person interactions more than before the COVID-19 crisis. The lockdowns have taught them the importance of living in the moment, as the simple things in life can be wiped out in a split second. Spending more time on screens than ever before is driving the need for a digital detox.

GLOBAL\* TREND SCORE 66%

NEXTGEN TREND SCORE 75%

## TREND MAPPING



## SECTOR PLAYING FIELD

34% MEDIA & ENTERTAINMENT

33% CONSUMER ELECTRONICS

22% TRAVEL & TOURISM

18% NO SECTOR

\*including the 16 markets from this research





RELATIONSHIPS

+



POSITIVE  
EMOTIONS

06

# SENTIMENTAL OPTIMISM

In times of crisis, consumers typically look back to happier times for comfort and social connectedness. Today there is a fresh take on nostalgia, with consumers blending decades that focus on youth culture. To tap into this, brands should transport consumers to carefree times with coming-of-age content featuring well-loved popular culture references.



## BEAUTY

Beauty brand **Squish** embraces coming-of-age style harking back to '80s/ '90s/ '00s youth culture in its brand comms.



BEST NEWCOMER: SKINCARE



## TRAVEL & TOURISM + ENTERTAINMENT

Airbnb partnered with the last **Blockbuster** store in Oregon to offer a one-night stay at \$4 – the price of a movie rental. The four-person stay included a couch, beanbags and '90s movies to watch, for those seeking some nostalgia.

## SPOTIFY JUXTAPOSES OLD-SCHOOL TUNES WITH TODAY'S RITUALS IN NOSTALGIC OUTDOOR CAMPAIGN

Ads remind music fans to "listen like you used to"



## ENTERTAINMENT

Spotify's 'listen like you used to' campaign playfully compares past and present lifestyles with a wordplay on different lyrics and tracks from the '80s and '90s.



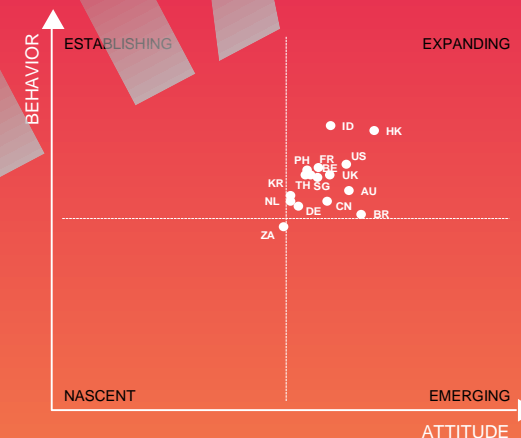
## FINANCE

Klarna is partnering with retro game **Animal Crossing** on a virtual pop-up for an in-game shopping experience featuring the game's main influencer Micah 'Noodles' Mahinay.

GLOBAL\* TREND SCORE 79%

NEXTGEN TREND SCORE 81%

## TREND MAPPING



## SECTOR PLAYING FIELD

26% MEDIA & ENTERTAINMENT

23% TRAVEL & TOURISM

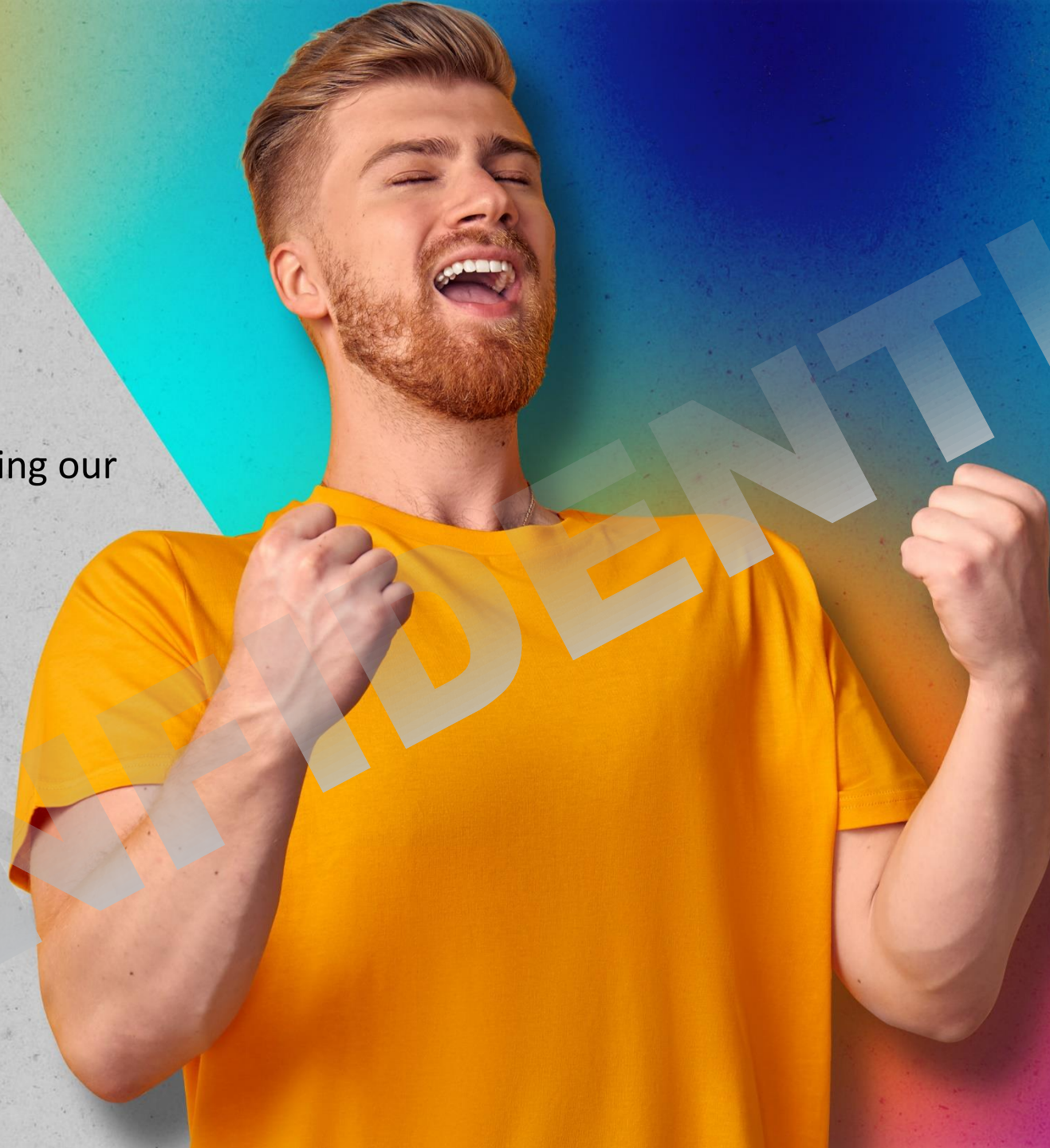
22% FASHION

19% NO SECTOR



# BODY

//Protecting and celebrating our  
physical selves







HEALTH

+



SECURITY

07

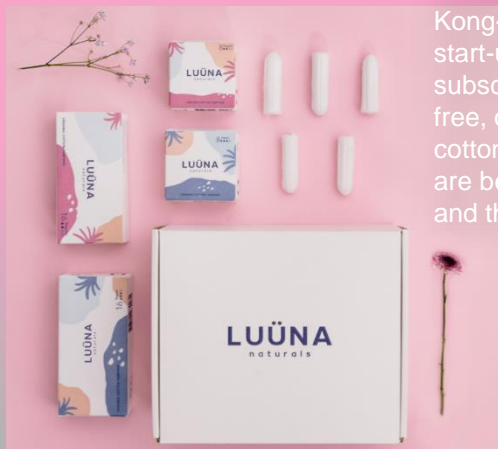
# NURTURING NATURE

Consumers are experiencing a new immediacy with nature, realizing its importance for better physical and mental wellbeing. This creates a brand opportunity to help consumers bring nature into the home as well as restore natural spaces. Brands should focus on unadulterated ingredients, alternative materials, and services that support enjoyment of the great outdoors in ways that make a positive impact on people and planet health.



## PERSONAL CARE

**LUÜNA Naturals** is a Hong Kong- and Shanghai-based start-up which offers monthly subscription boxes for toxin-free, organic and natural cotton sanitary products that are better for personal health and the planet.



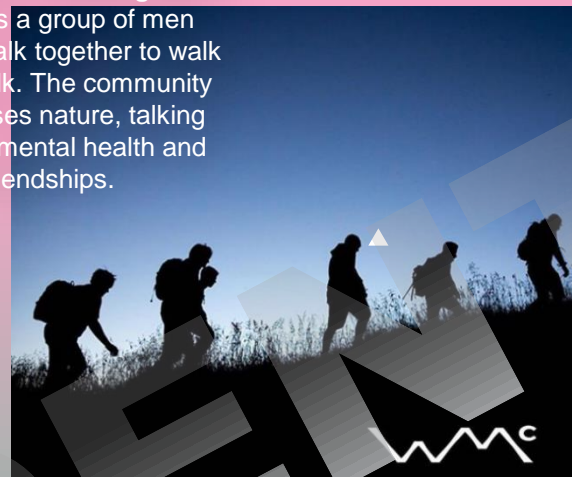
## PET RETAIL

As brands focus on rewilding pets, **My Dog Bites** pet-food range is based on all-natural ingredients and eco-friendly packaging.



## TRAVEL &amp; TOURISM

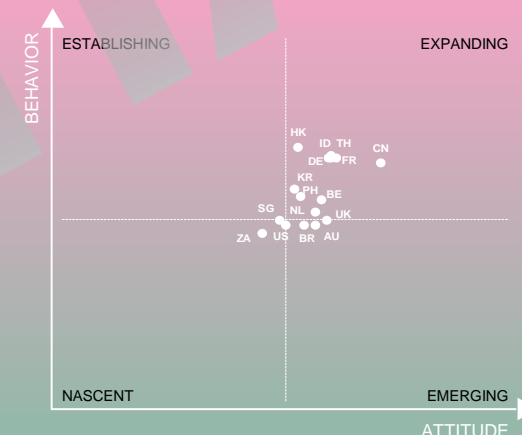
UK-based **Walking Men's Club** is a group of men that walk together to walk and talk. The community endorses nature, talking about mental health and new friendships.



GLOBAL\* TREND SCORE 76%

NEXTGEN TREND SCORE 77%

## TREND MAPPING



## HOME IMPROVEMENT



**IKEA's** 'Fortune Favours the Frugal' campaign shows that simple everyday solutions in the home, such as growing herbs and reusing water, can have a big positive impact on the planet.

The logo for 'Minimal' cleaning products, featuring the word 'Minimal' in a large, rounded, black font. Above the 'i' in 'Minimal' is a small icon of a spray nozzle with lines representing spray.

REFILLABLE CLEANING PRODUCTS  
NO NASTY CHEMICALS  
ABSOLUTELY NO WASTE

## CONSUMER GOODS

UK-based cleaning brand **Minimal** handmakes all products, promoting a closed-loop supply chain and green-only formulations.

## SECTOR PLAYING FIELD

28% TRAVEL &amp; TOURISM

26% HOME IMPROVEMENT

15% GROCERIES

23% NO SECTOR



HEALTH

+



SECURITY

08

# FIGHT FOR IMMUNITY

Consumers are now familiar with a range of biological terminology driving deeper engagement and fascination with personal biology. Looking ahead, brands should focus on immunity-boosting ingredients and formats that help build resistance and make tailored recommendations based on specific health needs.





## BEAUTY

**Drunk Elephant** recently introduced the F-Balm Electrolyte Waterfacial Hydrating Mask, claiming to replenish the skin barrier with an electrolyte cocktail.



## FOOD & BEVERAGE

Japanese fermented-food brand **Hakko Shokudo Kamoshika** offers consumers a fermentation-kit subscription service, enabling users to make soy sauce, miso, pickles, Yuzukoshō and Amazake at home.

## BEAUTY

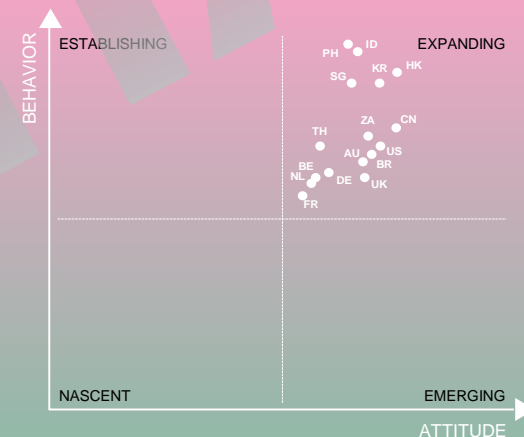
UK-based microbiome beauty brand **Gallinée** launched its first beauty supplement containing living probiotic strains, claiming one capsule is “as concentrated as 25 probiotic yoghurts”.



GLOBAL\* TREND SCORE 84%

NEXTGEN TREND SCORE 86%

## TREND MAPPING



## HEALTHCARE

German start-up **Loewi** analyses blood samples to make personalized nutritional recommendations.

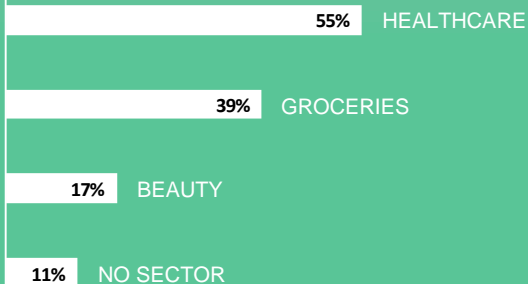


## HEALTHCARE



Israeli start-up **Nutricco** is developing an at-home smart device that dispenses supplements based on daily nutritional deficiencies, identified by a diet tracker via the app. The app also recommends foods to fill nutritional gaps.

## SECTOR PLAYING FIELD





HEALTH



SECURITY

09

# DESIGNING FOR RESILIENCE

Resilient environments are more important than ever to make consumers feel protected against outside forces, and to build resilient mindsets against future worries. Brands can help consumers feel safe and secure with new innovations, designs and systems that address future-focused needs, including mental health, hygiene and urban pollution.







SEE STRESS DIFFERENTLY

## HEALTHCARE

**Cigna International** is on a mission to improve its customers' mental health, wellbeing and peace of mind.

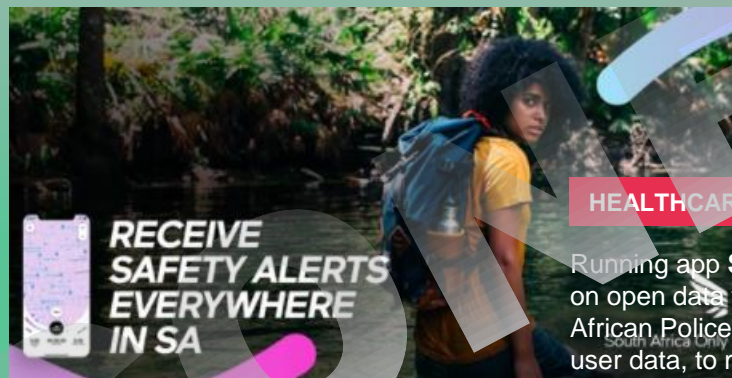


## AUTOMOTIVE

As hygiene becomes a baseline in transport, Chinese car company **Geely** rolled out contactless car-key delivery by drone to new owners.

## GROCERIES

Australian grocery store **Coles** launched a Coles Local in Chatswood, focused on building a better eco-shopping system. The store features refilling stations for toiletries and detergents. Their food and drinks offer includes Sydney-based businesses like Pasta Pantry, and Field to Fork.



RECEIVE SAFETY ALERTS EVERYWHERE IN SA

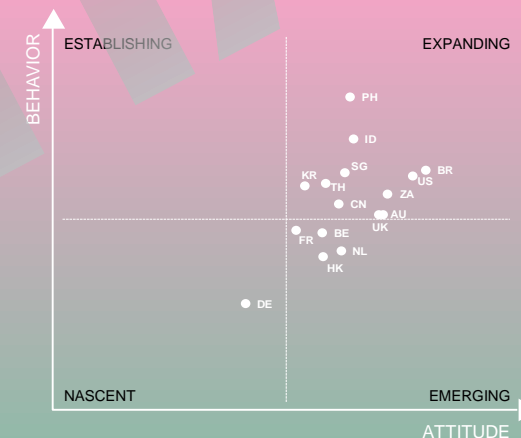
## HEALTHCARE

Running app **Safe Pace** draws on open data from the South African Police Service, and on user data, to map safe exercise areas for vulnerable groups, such as women and non-binary individuals.

GLOBAL\* TREND SCORE 81%

NEXTGEN TREND SCORE 84%

## TREND MAPPING



## SECTOR PLAYING FIELD

31% HEALTHCARE

26% FINANCE &amp; INSURANCE

19% GROCERIES

22% NO SECTOR





POSITIVE  
EMOTIONS

+



ENGAGEMENT

10

# AT-HOME PLEASURE

Consumers are spending more time at home, but still crave highly pleasurable and sensorial experiences. This creates opportunities for brands that bring rewarding and luxurious moments into the home, from perfectly crafted cocktails to high-end furniture. Being at home is no longer a pleasure compromise, it offers a familiar environment to explore new ways to feel great.





### LUXURY / HOMEWARE

UK-based interior rental company **Harth** revamped its website and expanded its services in July, now allowing users to not only rent Harth's pieces but also to put their own up for rent and sale.



### FOOD & BEVERAGE

**PPP Coffee** in Singapore has introduced a coffee subscription perfect for the aficionados that do not like settling for a regular cup.



### ELECTRONICS

Samsung is offering an upgrade of their 'The Wall' multimedia display, with a 110-inch television system to enjoy an at-home cinema experience. The Wall is being trialed in South Korea before a global release in summer 2021.



### HOMEWARE

Polish florist **Badylarz** has innovated doorstep sales to deliver long-lasting floral features in glass jars for people that cannot afford cut flowers regularly but still want a feature in the home.

## WHAT ABOUT NEXTGEN?

By Joeri Van den Bergh, NextGen expert

Gen Z is leading the homebody renaissance or the new 'cocooning'. They are (dis)engaging and escaping in TikTok bedroom content, hours of gaming and taking long lazy baths. Coziness, and staying at home for holy 'me' moments in their own bedroom fortresses, give them a chance to rebuff the cultural pressure of going out and being young.

### PERSONAL CARE

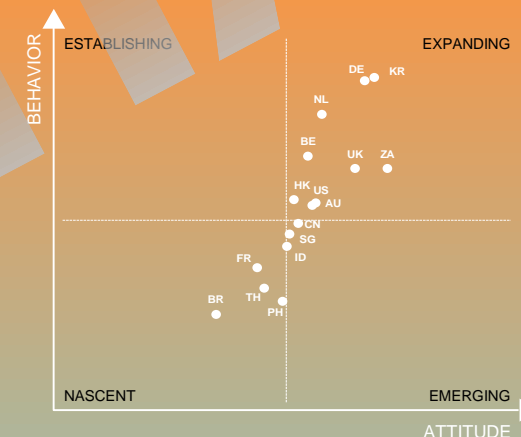
UK-based company **Green Stem** specializes in luxury CBD oils, bath bombs, lip balms and vape liquid for a calm wellness experience in the home.



GLOBAL\* TREND SCORE 75%

NEXTGEN TREND SCORE 80%

## TREND MAPPING



## SECTOR PLAYING FIELD

38% CONSUMER ELECTRONICS

33% HOME IMPROVEMENT

27% MEDIA & ENTERTAINMENT

13% NO SECTOR



RELATIONSHIPS



SECURITY

11

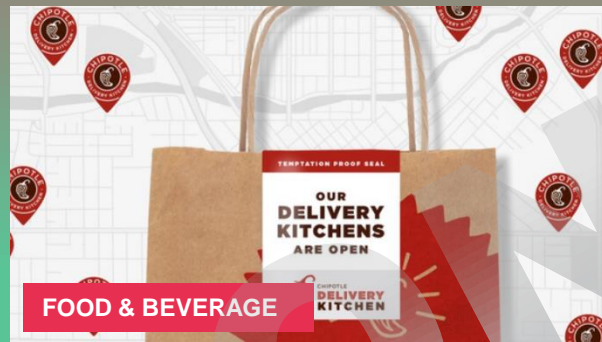
# REBUILDING TRUST

In an age of widespread misinformation and fake news, consumers are leaning on brands to deliver solutions that instill trust and restore a sense of security. Innovations in safe ingredients and tamper-proof packaging will thrive, as hygiene and safety become core needs, while tackling misinformation in the form of trusted accreditations, verifications and expert opinions will become a true marker of trust.

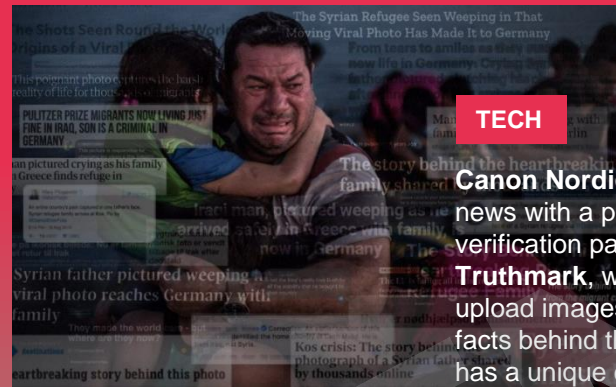




Prior to the 2020 US election, **Tumblr** launched an internet literacy campaign designed to help young audience spot fake news and unsavory posts on the voting scene. World Wide What? uses memes, GIFS and videos to teach about authenticity, news bias and sharing information online.



US fast-food chain **Chipotle** began offering takeaway deliveries in packaging with a tamper-evident seal, by way of a sticker that folds over the bag opening.



**Canon Nordic** is tackling fake news with a photojournalism verification partnership with **Truthmark**, where photographers upload images along with the facts behind them. Each photo has a unique digital fingerprint, and once uploaded the images are encrypted.

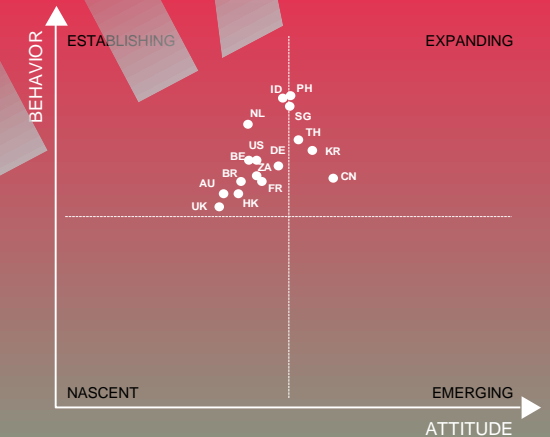


**Sity**, Brazil's very own Uber competitor, is regaining consumer trust by prioritizing driver and customer wellbeing. Sity takes detailed information and full-face photos of drivers and riders before allowing either to use the service, and the app has a built-in panic button in case of emergency.

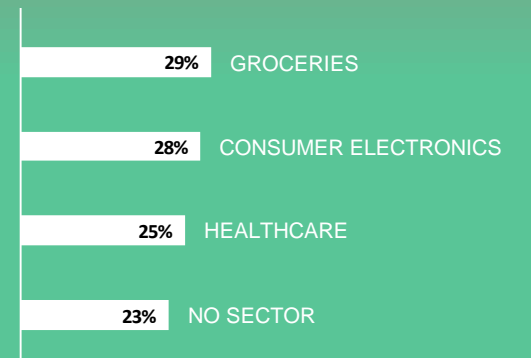
GLOBAL\* TREND SCORE 73%

NEXTGEN TREND SCORE 77%

## TREND MAPPING



## SECTOR PLAYING FIELD





# SOUL

//Seeking essence through  
peace and purpose







MEANING

+



RELATIONSHIPS

CONFIDENTIAL

12

# DISENTANGLING TABOOS

Consumers are seeking knowledge and understanding of topics deemed uncomfortable taboos, such as poverty, disability and menopause. Brands can play an important role by identifying, educating and uplifting social stigmas. Real-life storytelling and visually raw campaigns will help actively challenge societal norms and the status quo.



How to deal with leaks during the menopause



### PERSONAL CARE

Feminine care brand **Tena's** latest Silhouette Noir product range is designed to tackle perceptions of ageing, menopause and incontinence.



I've loved this body for 58 years, and still do.  
"我58岁，我依然爱我的身体。"

Less is more.  
"平胸，真的不会有负担。"

Scars are life's burning kisses.  
"疤痕，完整我的生命线。"

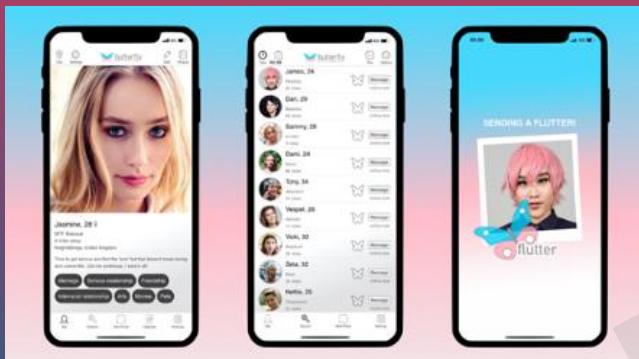


### FASHION

Chinese lingerie brand **Neiwai** challenges narrow cultural expectations of Chinese bodies to celebrate the diversity of women in all shapes and sizes.

### MEDIA & ENTERTAINMENT

Global trans dating app **Butterfly** launched recently in India, promoting LGBTQ+ rights. The app gives unconstrained gender and sexuality options, with members being able to adapt their preferences as they go through their transition.



## WHAT ABOUT NEXTGEN?

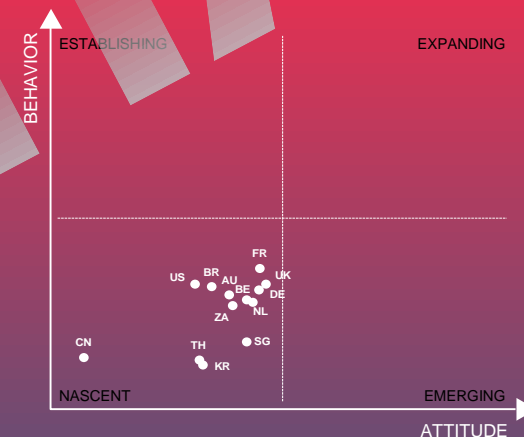
By Joeri Van den Bergh, NextGen expert

Gen Zers do not want to be put in a box. They are the most open-minded, diverse and globally connected generation ever. Being more socially progressive than the generations before them, Gen Z is challenging societal norms and labels. They reject non-inclusive brands or binary thinking, and believe companies have a responsibility to help build a better world. They buy brands that care about values and issues that are important to them.

GLOBAL\* TREND SCORE 59%

NEXTGEN TREND SCORE 63%

## TREND MAPPING



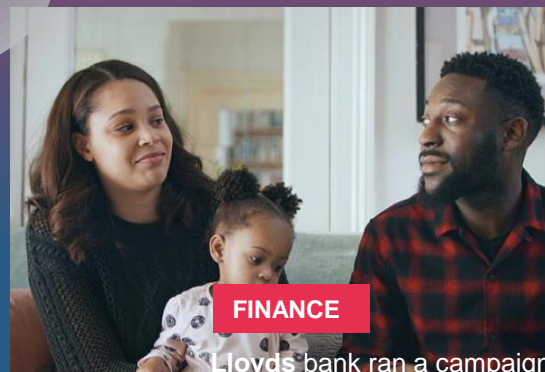
## SECTOR PLAYING FIELD

22% MEDIA & ENTERTAINMENT

16% FASHION

15% BEAUTY

39% NO SECTOR



### FINANCE

**Lloyds bank** ran a campaign that encouraged people to talk about their financial anxiety and concerns to break money taboos, especially in families.





MEANING

+



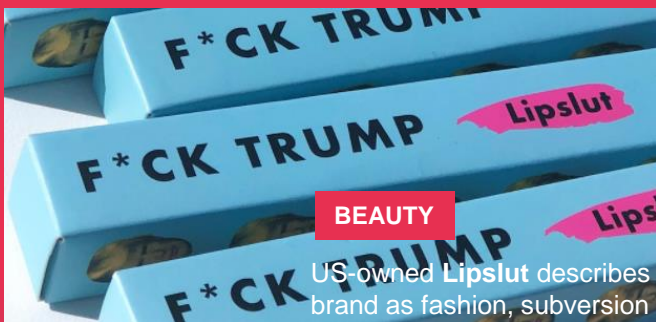
RELATIONSHIPS

13

# UNAPOLOGETIC ACTIVISM

Consumers have been exposed to visible systemic injustices, causing a spark to act and drive social reform. This is creating opportunities for brands that can positively impact a cause and call out deep-rooted discrimination in society. Authentically calling out relevant issues specific to local markets is key for success.





### BEAUTY

US-owned **Lipslut** describes its brand as fashion, subversion and a middle finger to the current political landscape, with products such as a F\*ck Trump lipstick.



### FINANCE

**Mastercard's** inclusive initiative **#AcceptanceMatters** launched **True Name**, supporting the LGBTQ+ community enabling a person's chosen name to feature on their payment cards.



### MEDIA & ENTERTAINMENT

**Confinada**, a comic book published regularly on Instagram, used the pandemic to illustrate issues of racism, structural inequality and sexism in Brazil.

## WHAT ABOUT NEXTGEN?

By Joeri Van den Bergh, NextGen expert

Gen Z is challenging the status quo. During the global pause, they witnessed irresponsible leadership, systemic injustice, corrupt politics, and inequality and disparity, even more than before. It led to waves of disappointment and activism that went beyond the climate protests of 2019. While being unable to turn to the streets to protest, Gen Z turned into clicktivists using TikTok, Animal Crossing and other social media to voice their disapproval.



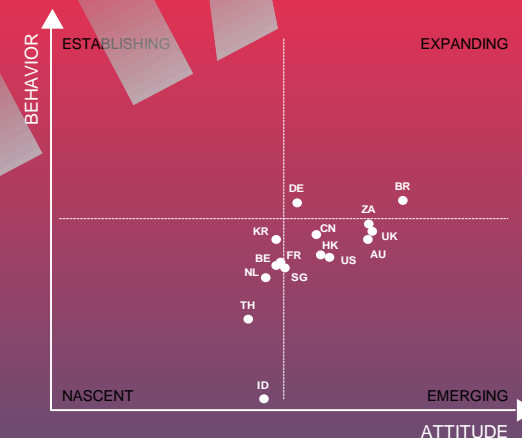
### FASHION

**The Denim Tears x Levi's** collab explores the African-American history. The campaign features a short film featuring the designer Tremain Emory's two grandmothers discussing growing up in the segregated South.

GLOBAL\* TREND SCORE 72%

NEXTGEN TREND SCORE 73%

## TREND MAPPING



## SECTOR PLAYING FIELD

25% MEDIA & ENTERTAINMENT

14% FASHION

13% FINANCE & INSURANCE

41% NO SECTOR





RELATIONSHIPS



SECURITY

14

# NEIGHBORLY NETWORKS

Accelerated by COVID-19, consumers are recognizing the value of community ties to their social lifestyles, while new platforms are enabling local networks to tackle growing concerns about education gaps, loneliness and sustainability. Brands can navigate this space with partnerships or upskilling schemes that actively support specific communities and small businesses.



### TRANSPORT

Ride-hailing app, **Angkas** launched their food-delivery services throughout lockdown to provide income for their bikers, allowing them 100% of the profit.



### FOOD & BEVERAGE

**Unilever's Food Solutions** created learning modules for chefs around the world facing challenges in the catering industry. From food safety to nutrition and immunity support, the scheme helps local chefs worldwide, from Singapore to the US.

## WHAT ABOUT NEXTGEN?

By Joeri Van den Bergh, NextGen expert

With many Gen Zers seeing local business under pressure, they have shown an increased willingness to support them. The crisis also exposed some of the more vulnerable groups in their age cohort, like singles, asking for more effective mental health assistance. Gen Z was also confronted with an increase in divorce rates and domestic violence, that might have a long-term impact on their wellbeing.



### FINANCE

**NextDoor** is currently available in Australia, the US and Europe. In the UK, NextDoor partnered with Barclays bank. Their new feature allows businesses to opt in on a dedicated Coronavirus Open for Business Directory so residents can see local traders.



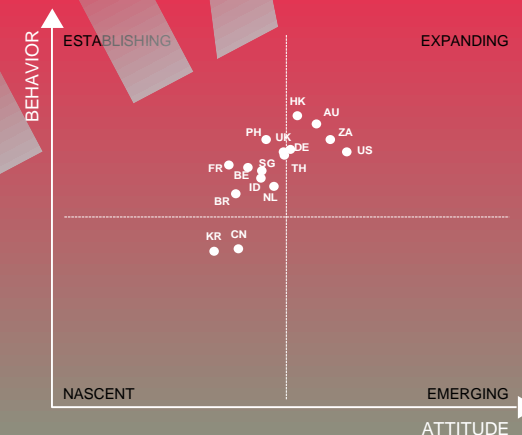
### FASHION

Streetwear brand **Neighborhood Spot** was set up to support iconic New York businesses such as Ray's Candy store. In addition to selling merchandise, it also holds a monthly Rent Relief Lottery.

GLOBAL\* TREND SCORE 73%

NEXTGEN TREND SCORE 75%

## TREND MAPPING



## SECTOR PLAYING FIELD

38% GROCERIES

24% RETAIL & LEISURE

20% FASHION

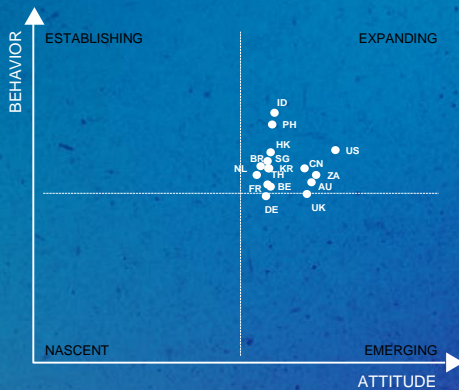
22% NO SECTOR



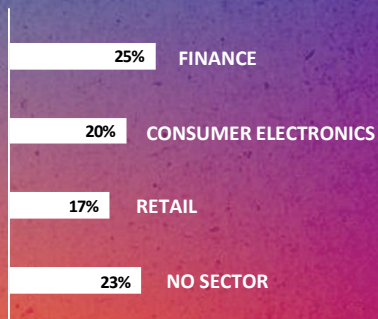
GLOBAL\* TREND SCORE 81%

NEXTGEN TREND SCORE 86%

### TREND MAPPING



### SECTOR PLAYING FIELD



## HOW TO READ THE DATA IN THIS REPORT

- **TREND SCORE:** represents the trend strength. The percentage of people for whom the trend is emerging, establishing or expanding, and that therefore have a positive attitude and/or behavior towards the trend. The global\* score gives this percentage across 16 markets, while the NextGen trend score shows the result for GenZ and Millennial consumers.
- **TREND MAPPING:** highlights how a trend is manifested across the world, in terms of attitude and behavior. Attitude is measured as the extent to which people identify with the trend, while behavior indicates to what extent people have acted upon the trend when buying brands. The mapping uses standardized scores, to filter out any country-specific response biases and to make country comparisons possible.

Country codes in this mapping: AU (Australia), BE (Belgium), BR (Brazil), CN (People's Republic of China), DE (Germany), FR (France), HK (Hong Kong SAR), ID (Indonesia), KR (South Korea), NL (the Netherlands), PH (Philippines), SG (Republic of Singapore), TH (Thailand), UK (the United Kingdom), US (the United States of America), ZA (South Africa).

- **SECTOR PLAYING FIELD** graph: gives an overview of the top three sectors consumers link with the trend. It also indicates the number of consumers that indicated no sector, illustrating there is still room for sectors to act upon the giving trends.

The data is based on a survey with 15.000 consumers in 16 countries, in a field partnership with Dynata.



# WHAT DOES THIS MEAN FOR YOUR BRAND

We hope you found this report interesting and inspiring, but we know true value comes in the application in your real-world business challenges. Which culture shifts and emerging trends are shaping your consumer, your category and your brand?

At InSites Consulting, we have a centralized team of culture and trends experts and thought leaders, experienced in delivering Culture + Trends projects for brands across the globe:

- **Future lifestyle scenarios** - provide clarity on how consumer lifestyles are set to change, and the opportunities this will create for your category or brand
- **Innovation platforms** - create future-facing platforms for consumer-centric innovation, by understanding emerging consumer needs
- **Creative territories** - build powerful creative territories that deliver strategic brand growth by leveraging genuine cultural change
- **Concept optimizations** - supercharge concepts so they authentically match your target audience, through collaboration with passionate cultural connectors
- **Future-Consumer Inspiration sessions** - (virtual) in-company sessions on consumer trends, sustainability or the impact of NextGen on marketing

Should you like to hear more, we would love to hear from you, so please get in touch!

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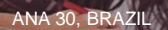
## MEET CULTURE + TRENDS

Our awarded Culture + Trends team is a global group of specialists with backgrounds across anthropology, history, journalism and psychology. They are immersed in trends and work globally across markets, sectors and client accounts.





## ILLUMINE NETWORK

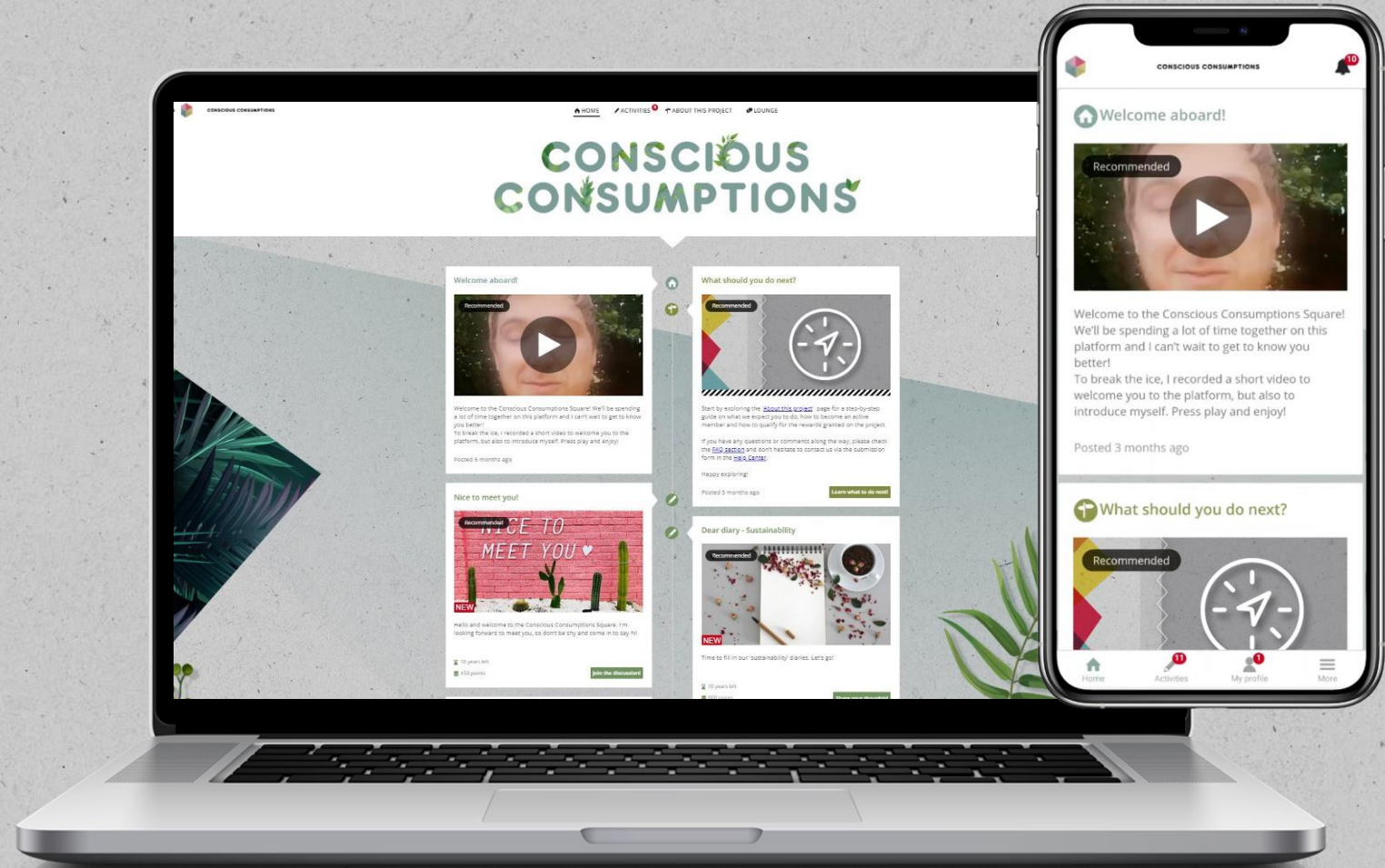




# MEET THE SQUARE

Our powerful insight community platform allows to connect with and learn from consumers. Its integrated suite of qualitative and quantitative research activities not only brings deep consumer understanding; it also allows to test ideas and concepts and validate trends.

This next-level proprietary insight management platform connects consumers and brand stakeholders to shape the future of your brand(s).





# SPECIAL ACKNOWLEDGMENTS

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