

Trends 2022+

Global Trend Synthesis:

Connecting the dots between what we see today and projections of the mid-term future.

May 2022

Jo Lepore & Lianne Kwan,
MW Global Foresight

with assistance from Jessica Southard,
Mars Horizon Foresight

MARS WRIGLEY | Human Intelligence



You cannot know all things at all times. You should be curious, rather than absolutely certain, about what you perceive in the present.

Amy Webb, Quantitative Futurist, 2022.

We synthesized over 200+ reports and 2,000+ global trends.

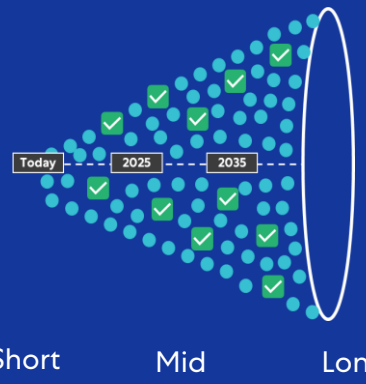
Research.

Global Horizon Scanning leveraging 200+ global trend reports focused on 2022-2026.



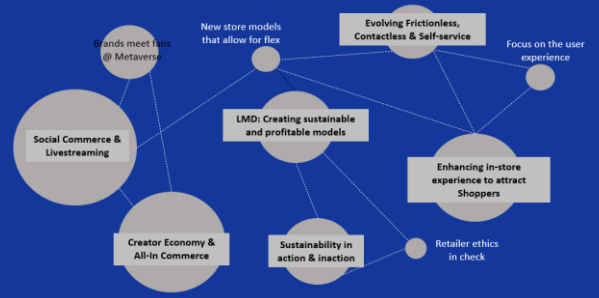
Synthesis.

Plotting the key trends and projecting their short, mid and long term impact on our industry.



Mapping.

Fringe mapping allows you to plot signals of change. It allows you to see the big trends and their relation to one another.

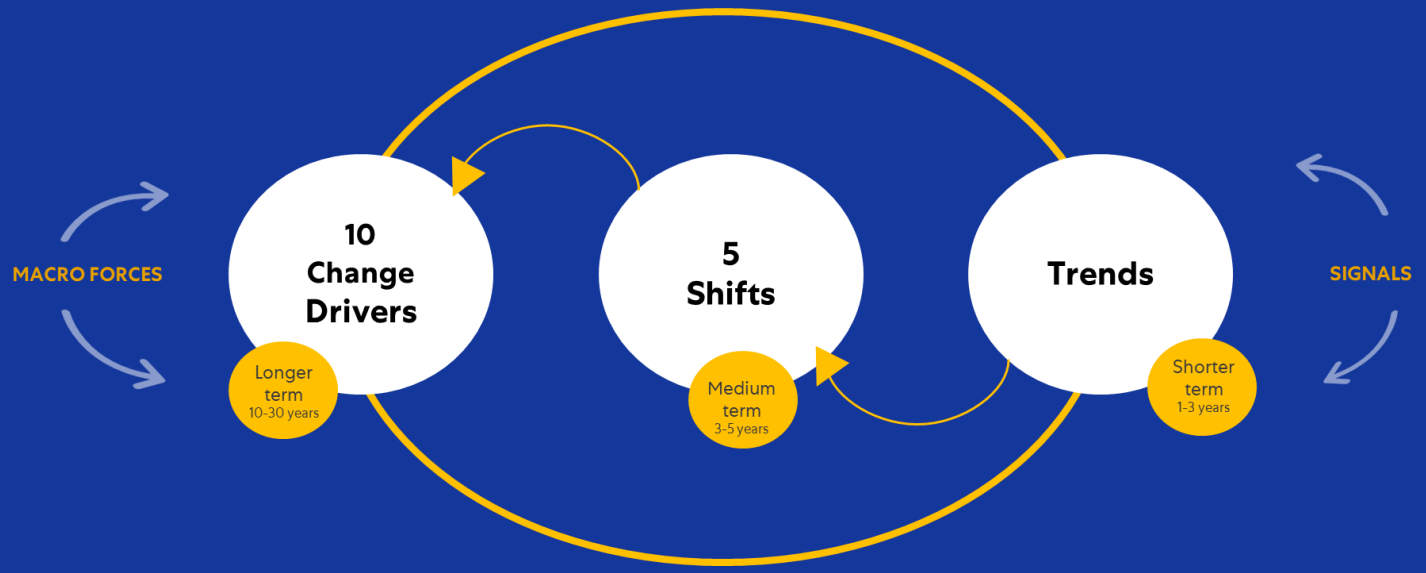


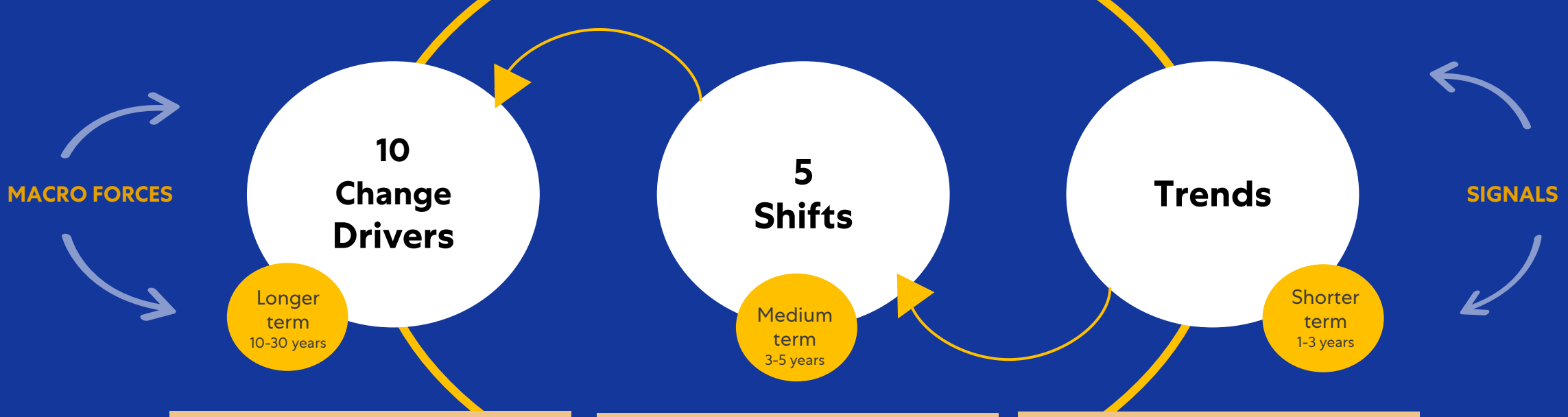
This trend synthesis allows us to look deeply across our existing macro trends & shifts.

It is important to learn how the shorter term trends create pathways for longer term futures.

While it feels new, this is aligned to our Macro Trends







Change Drivers identify the cause and implication of a longer lasting and significantly influential force of change. While they describe an external disruption, they also clearly articulate a business problem to solve.

Change Drivers should be used for scenario planning and as a guide on where to dig deeper in research and analysis for long term planning.

Shifts articulate the human and cultural implications of durable trends impacting our category. They therefore focus in on macro and micro factors as they identify both what is growing today and transitioning into the future.

Shifts should be used in strategic planning to build or compliment frameworks that looks out 3-5 years.

Trends represent movement, driven by human needs and desires. They are usually persistent, evolving into a slightly different iteration. That's why some of the trends you'll see in this deck look somewhat familiar. Remember we're never looking at what is trendy and transient, but at the trends that will grow stronger and more prominent in our industry.

Trends can be acted upon NOW.

Copyright © 2022 Mars Wrigley Human Intelligence — Confidential

Everyone sees trends. Anyone can read a trend report.

Let's make sense of it.



What this doc is:

1. A review and analysis of over 200 global trends reports.
2. One aligned view of the top trends that we'll see influence mid term human behavior from 2022.
3. A lens into how these trends travel across the world and key differences between a west and east market.

What you'll get from this doc:

1. Exposure to global trends beyond a handful of reports traditionally relevant to you and your area of responsibility.
2. Translation of WHAT is happening into WHY.
3. Learn the skills to build your foresight muscles by applying critical thinking.

Shorter term trends allow you to act NOW.

How you can apply these trends into strategic thinking and planning:



Strategy Planning:
Identify new opportunities and assess headwinds that may impact our business both in the near and long term. Consider the red flags carefully; they show wild cards and blindspots missing from mainstream conversations.

One Demand Teams (sales & marketing):
Highlight changing shopper and consumer behaviors – and the broad context influencing that behavior – and feed this into trade, branding, communications planning.

Innovation teams:
Identify changes to JTBD and platforms to scale for innovation territories and platforms.

Regional and local teams:
Consider how key trends will or will not impact your markets & where trends will come from before they reach you (who can you learn form?) to anticipate changes that will impact 3 year planning.

Everyone:
Use this as an opportunity to STOP! Get curious, go broad and think critically about what you see.

But first. What is the world feeling in 2022?

We started the year on a high.

In February, we saw remarkable stability in global consumer sentiment, at similar levels to pre-pandemic.

IPSOS Feb 2022, Global, n=17,500

A war in Ukraine, high cost of living, resource scarcity, a new covid wave ...

In March, Consumer Confidence dropped to near-pandemic lows. A pessimistic outlook was evident in both business and consumers.

OECD, March 2022, 38 markets n=100,000

Exhaustion and fatigue set in.

Three in 10 people say mental health is one of the top health problems facing people in their country today. Around the world, 79% now say that our mental health is as important as our physical health.

IPSOS, Global 30 countries, Oct 2021 n=21,513
The World Bank 2020

But who will help us get through?

Only one-third of the world believes most people can be trusted fueled by an all-time high fear of fake news (76%). More than half (51%) do not believe their families will be better off five years from now.

Edelman Nov 2021, Global, n=36,000+

What will the world look like in 2025?



By 2025, the **world's population** is expected to increase by nearly one billion people, 300 million of whom will be aged 65 or older.



Those over **65+** will make up 11% of the global population (21% of EU). (9.3% 2020.)



Population **density** is expected to increase from 51 people per km2 to 55, with more people in urban areas.



GDP is expected to grow in G7 and E7 markets but from 2024 this will be at a significantly lower rate.



At least 40% of companies will be contingent (**gig**) **workers**.



Gen Z will make up 27% of the global workforce.



1 in 5 adults worldwide are expected to have **obesity** with all countries falling short of 2025 targets.



There's a 40% chance of at least one year being **1.5C hotter** than the pre-industrial level.



Renewables will have usurped coal to become the biggest source of electricity generation globally.



The annual number of **natural disasters** is set to increase by 37% (from 442 to 541 occurrences) by 2025 globally.

MARS WRIGLEY | Human Intelligence

Sources: Deloitte, The Economist Intelligence Unit, World Obesity, We Forum, Forbes, Access Partnership, Int Energy Agency, World Meteorological Organization, PWC. (2020-2022)

If we define futurism as an exploration beyond accepted limits, then the nature of limiting systems becomes the first object of exploration.

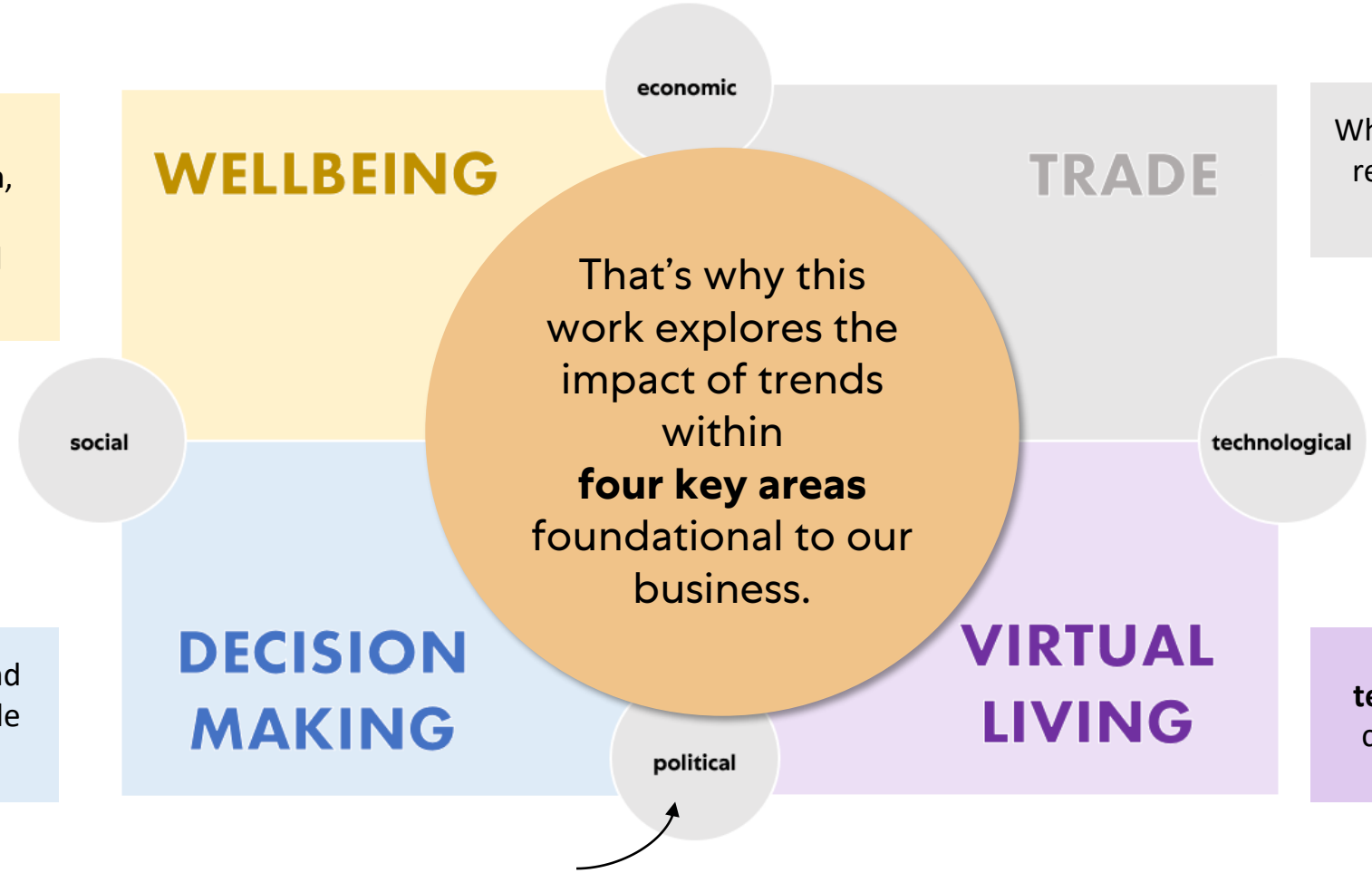
Frank Herbert, American author (Dune).



That's why this work explores the impact of trends within **four key areas** foundational to our business.

2022 Trend Maps

The evolution of our relationship to **health**, spanning physical, emotional and social dimensions.



Where and how we **shop**, reflecting our changing expectations.

The external forces and inside voices that guide our **choices**.

The influence of **technology** on how we connect, transact and enjoy our lives.

These four areas are influenced by the longer term **macro forces**.

To see more on the Macro Trends, Shifts and Change Drivers please get in touch.

2022 Trend Maps

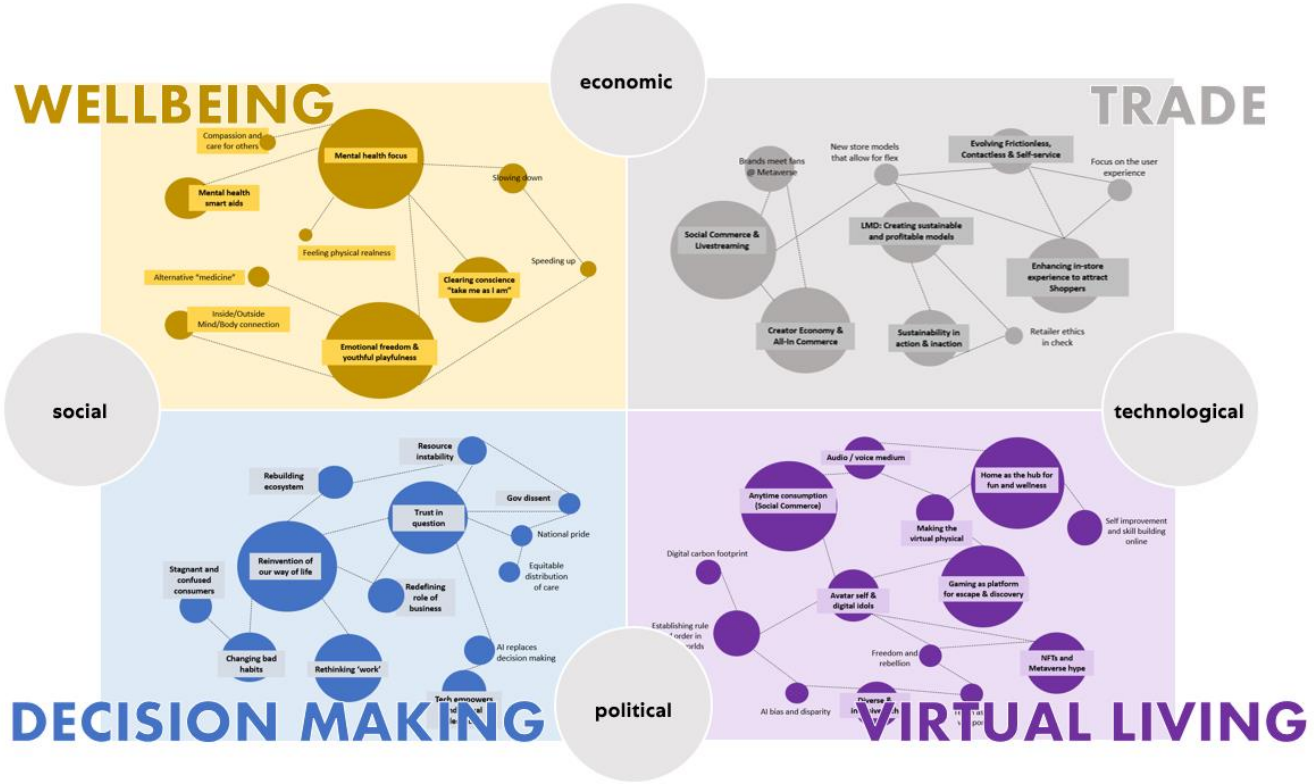
In synthesizing trends across these four key areas, we have also found alignment with our mid and long term foresight work.

The evolution of our relationship to **health**, spanning physical, emotional and social dimensions.

Connected to ...
Macro Trends: Holistic H&W, New Values Equation
Shifts: Inside Out, Joy of Misbehaving
Change Drivers: Nourishing Wellbeing, Happy Moments, Reconnect with Real

The external forces and inside voices that guide our **choices**.

Connected to ...
Macro Trends: Power & Trust, Environmental Awakening
Shifts: Adaptability, Renewed Purpose
Change Drivers: New Trust Models, Lasting Shifts



Where and how we **shop**, reflecting our changing expectations.

Connected to ...
Macro Trends: Connected Lives, New Values Equation
Shifts: Adaptability & Presence Free Living
Change Drivers: Accessible Convenience, New Trust Models, Consequence Discovery

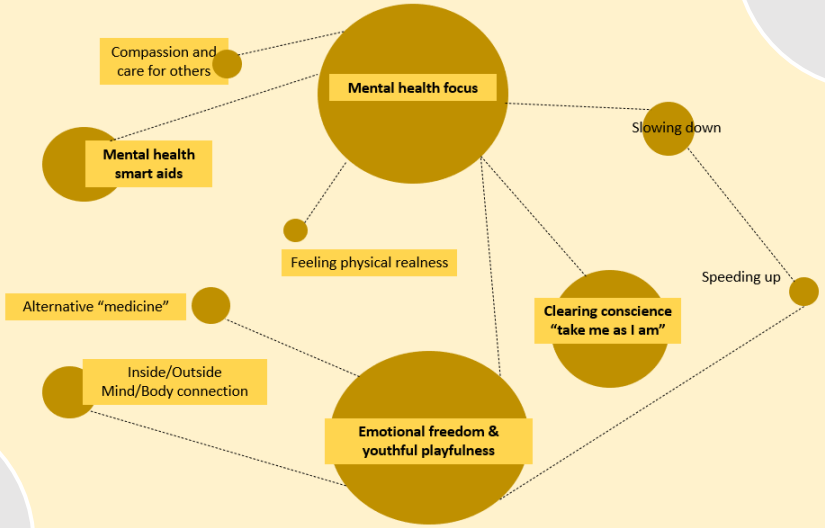
The influence of **technology** on how we connect, transact and enjoy our lives.

Connected to ...
Macro Trend: Connected Lives, New Values Equation
Shifts: Presence Free Living, Joy of Misbehaving
Change Drivers: Navigating the Metaworld, Superhuman, Consequence Discovery

To see more on the Macro Trends, Shifts and Change Drivers please get in touch.

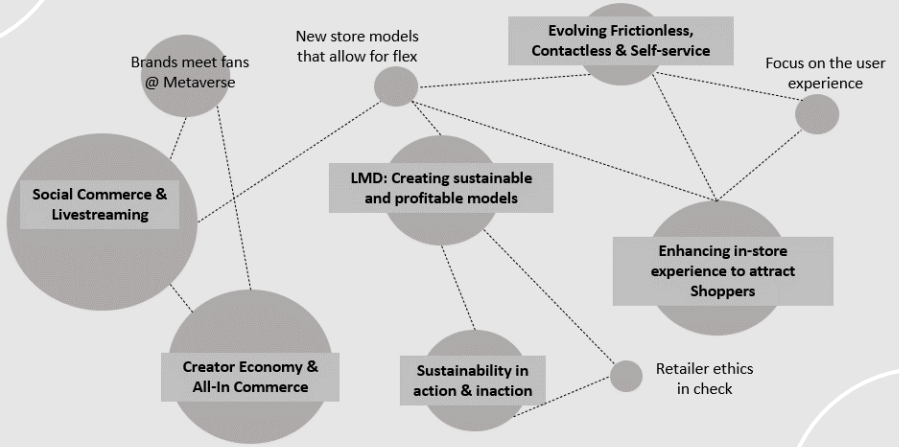
2022 Trend Maps

WELLBEING



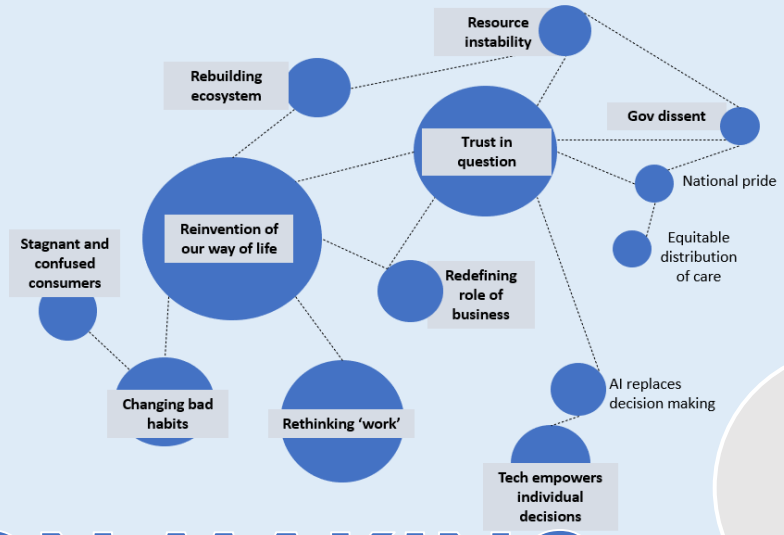
economic

TRADE

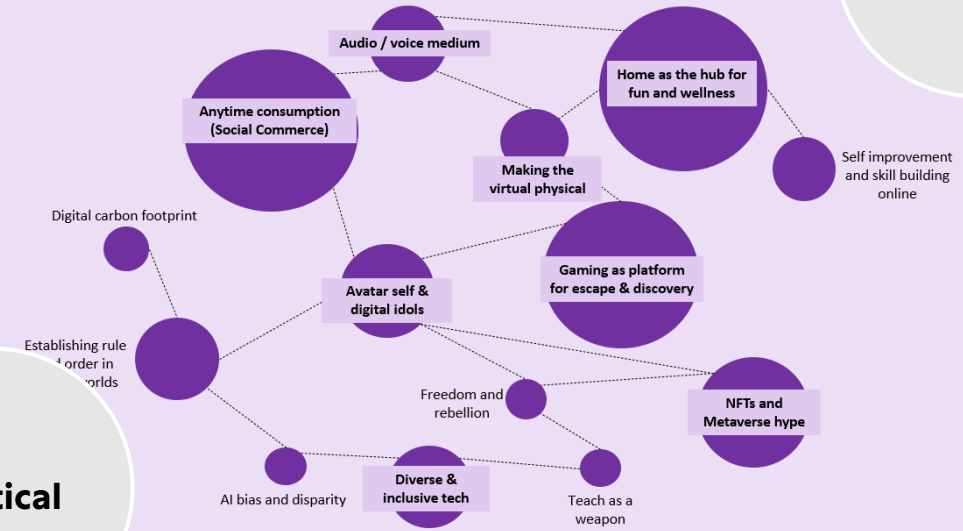


social

technological



political



DECISION MAKING

VIRTUAL LIVING

How to read our maps.

Why read trends, when you can see them?

See the mature and mainstream trends



See key signals within each trend

See where trends are connected

And the smaller fringe trends

See the bigger themes that come through

See what's missing from trend reports

Click on a signal or report to go directly to the source

2022 Trend Maps

Because we all digest information a little differently, use this as guidance of what's available but pick your own starting point!

How to read the maps:



1: This map is core to the **key trends** we see. It gives you a high level view of what the mainstream trends are, the smaller bubbling trends, and how they are connected.



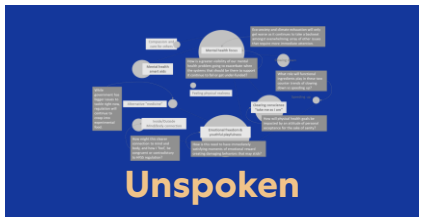
2: This page outlined the **key thoughts and feelings** driving this for people.



3: This is an overlay of the **bigger themes** coming through when you look at the intersection of the trends, to help push our thinking into the longer term.



4: We know there is A LOT here! If you need a shortcut, you can go to the **TL; DR** (Too Long; Didn't Read) page to get some thought starters of the **trends that we can act on NOW**.



5: Many trend reports talk about the same things. **What is unspoken**? What is implied? What are the potential blindpsots and risks? This is key to practicing critical thinking.



6: It's important to know what sits underneath each of the trends, here you can see some of **key signals** to spark ideas for our category.



7: **Opportunities for Treats & Snacks** exist everywhere, even in less obvious places. Here we've highlighted some direction for our business, whether it's preparing for a headwind or accelerating a tailwind.



8: Trends show up differently in different markets, here we spotlight a key trend and show its **different activation in the US vs China.**

Let's start exploring!

WELLBEING



The COVID-19 pandemic has accelerated the deterioration of our collective well-being. In this dire landscape, mental wellness offers a path forward to help meet widespread needs and increase well-being for all. A big shift toward mental wellness is just beginning.

Global Wellness Institute

MARS WRIGLEY | Human Intelligence

TRADE



Many consumers don't go to a store to make a purchase – they go to experience the brand, get inspired and learn about products. So it's time to start thinking about the store as a marketing opportunity, rather than a marketplace.

Trendwatching

MARS WRIGLEY | Human Intelligence

DECISION MAKING



We find a world ensnared in a vicious cycle of distrust, fueled by a growing lack of faith in media and government. Through disinformation and division, these two institutions are feeding the cycle and exploiting it for commercial and political gain.

Edelman Trust Barometer 2022

MARS WRIGLEY | Human Intelligence

VIRTUAL LIVING



The new tools that transform humanity always look like toys at first.

Raj Gokal, co-founder, Solana

MARS WRIGLEY | Human Intelligence

Click on the area to go directly to that section

WELLBEING



The COVID-19 pandemic has accelerated the deterioration of our collective well-being. In this dire landscape, mental wellness offers a path forward to help meet widespread needs and increase well-being for all. A big shift toward mental wellness is just beginning.

Global Wellness Institute

WELLBEING is about

the evolution of our relationship to **health**, spanning physical, emotional and social dimensions.

fast facts



$4.4 T +9.9%

Global Wellness Economy 2020, and projected growth to 2025, to $7 T.



$1.1 T

Food & Beverage H&W market by 2027



$131 B & $945B

Mental Wellness & Heathy Eating, Nutrition, Weight Loss markets



36% & 45%

People in the US and APAC who have experienced serious mental health effects in 2021

MARS WRIGLEY | Human Intelligence

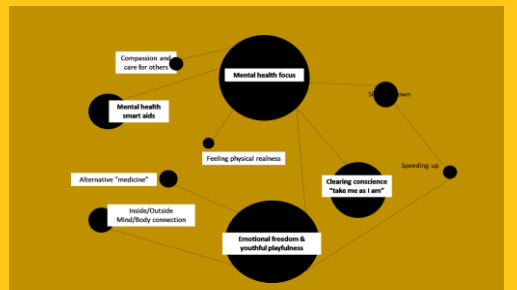
Sources: Global Wellness Institute, McKinsey, IPSOS, American Psychiatric Association, 2021.

WELLBEING

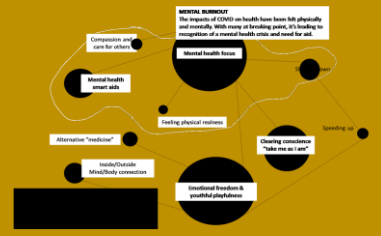
Trends maps directory:

click on a section to go straight there.





[Key Trends]



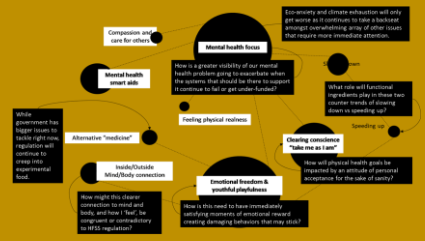
[Bigger Themes]



[TL;DR / Act Now]



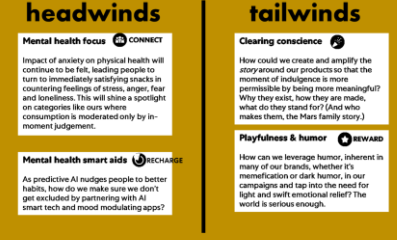
[Thoughts & Feelings]



[Unspoken]



[Key Signals]



[Opportunities]



[US & China Example]

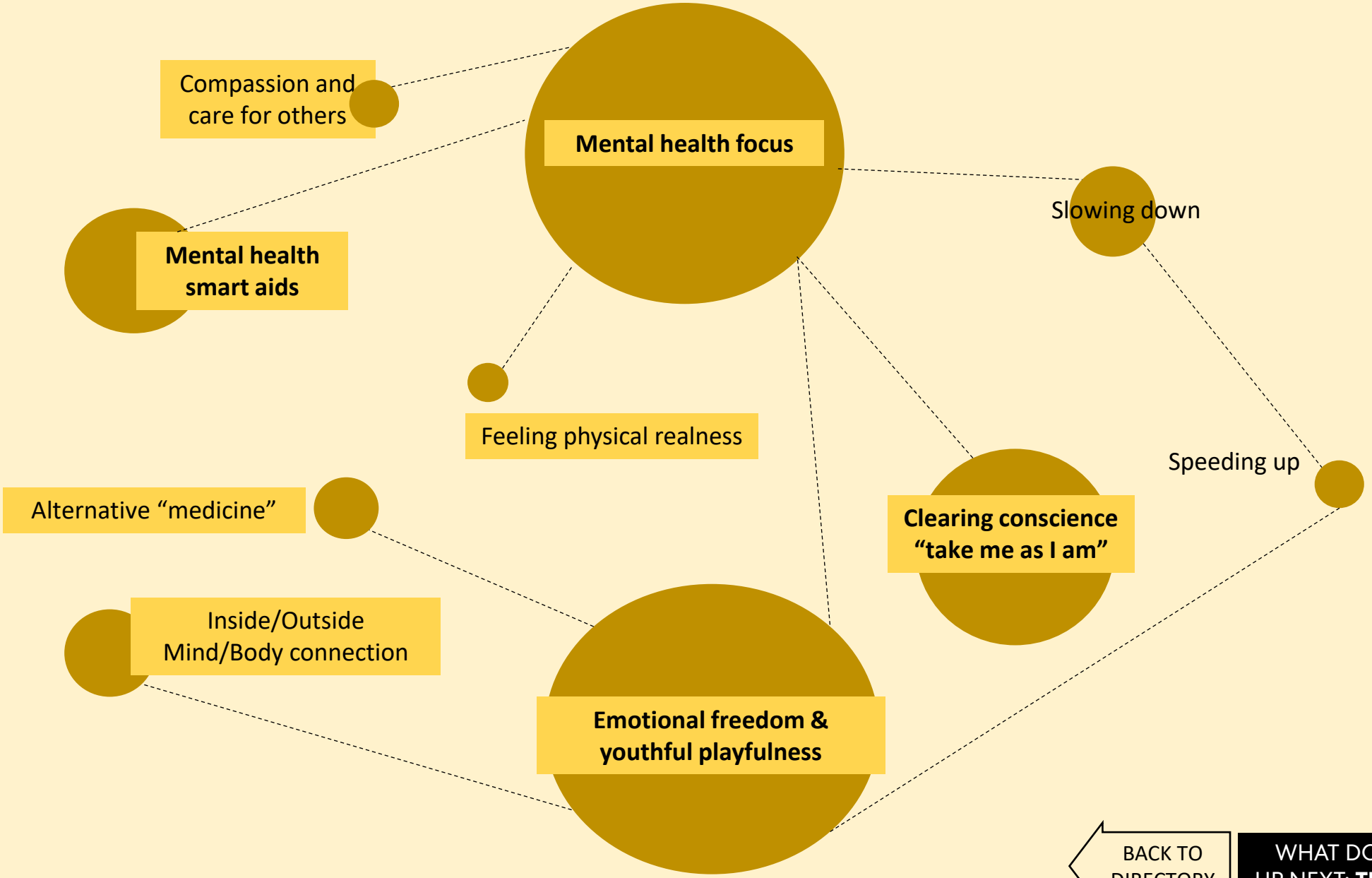


[Sources]

MARS WRIGLEY | Human Intelligence

WELLBEING

Trends map.



Size of bubbles indicate maturity (mainstream/weak)

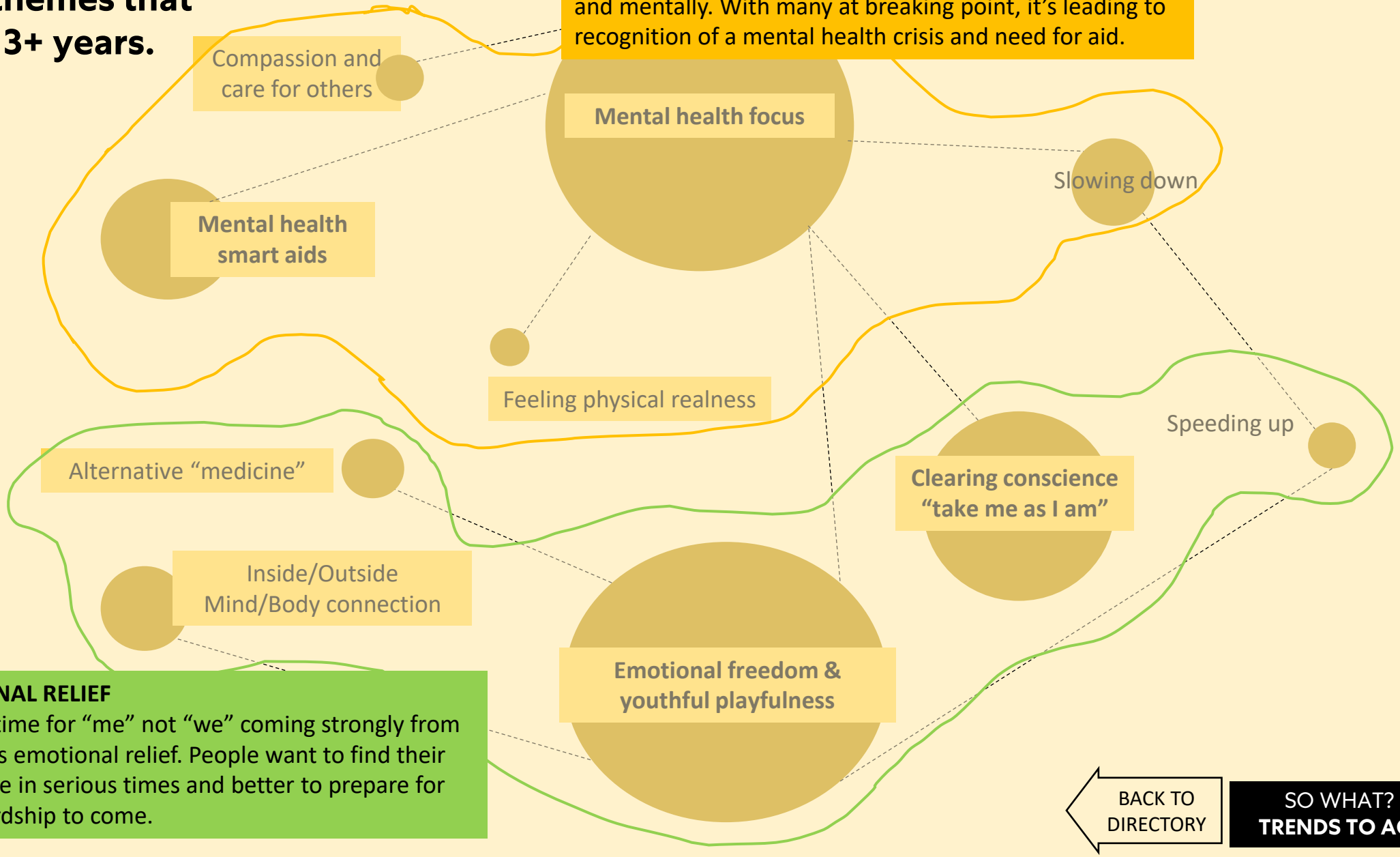
BACK TO DIRECTORY

WHAT DOES IT MEAN?
UP NEXT: **THE BIG THEMES**

WELLBEING

The big themes that may last 3+ years.

MENTAL BURNOUT
The impacts of COVID on health have been felt physically and mentally. With many at breaking point, it's leading to recognition of a mental health crisis and need for aid.



EMOTIONAL RELIEF
This is a time for "me" not "we" coming strongly from rebellious emotional relief. People want to find their innocence in serious times and better to prepare for more hardship to come.

BACK TO DIRECTORY

SO WHAT? UP NEXT: **TRENDS TO ACT ON NOW**

TL;DR WELLBEING

TRENDS WE CAN ACT ON NOW.

CONNECT



Buddy from LiveFreely monitors senior wellbeing

Compassion and care for others

RECHARGE



Douyin in China forces users to take 5 sec pauses after 1 in 6 videos

Mental health smart aids

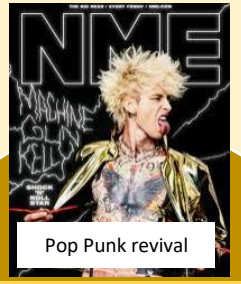
Mental health focus



Red Bull's 2021 World Mental Health Day campaign explored the importance of self-esteem.

REWARD

REWARD



Pop Punk revival

Speeding up



Multifunctional wellness with Mojo gummies

RECHARGE

Emotional freedom & youthful playfulness

RECHARGE

Inside/Outside Mind/Body connection



Astrology and mysticism boom

TREND OPPORTUNITY #1:

Be a mental health friend

The impacts of COVID on health have been felt physically *and* mentally. People are looking to brands to help them counter physical exhaustion, feelings of stress and anxiety, and provide some small aid through hardship.

TREND OPPORTUNITY #2:

Provide play and emotional escape

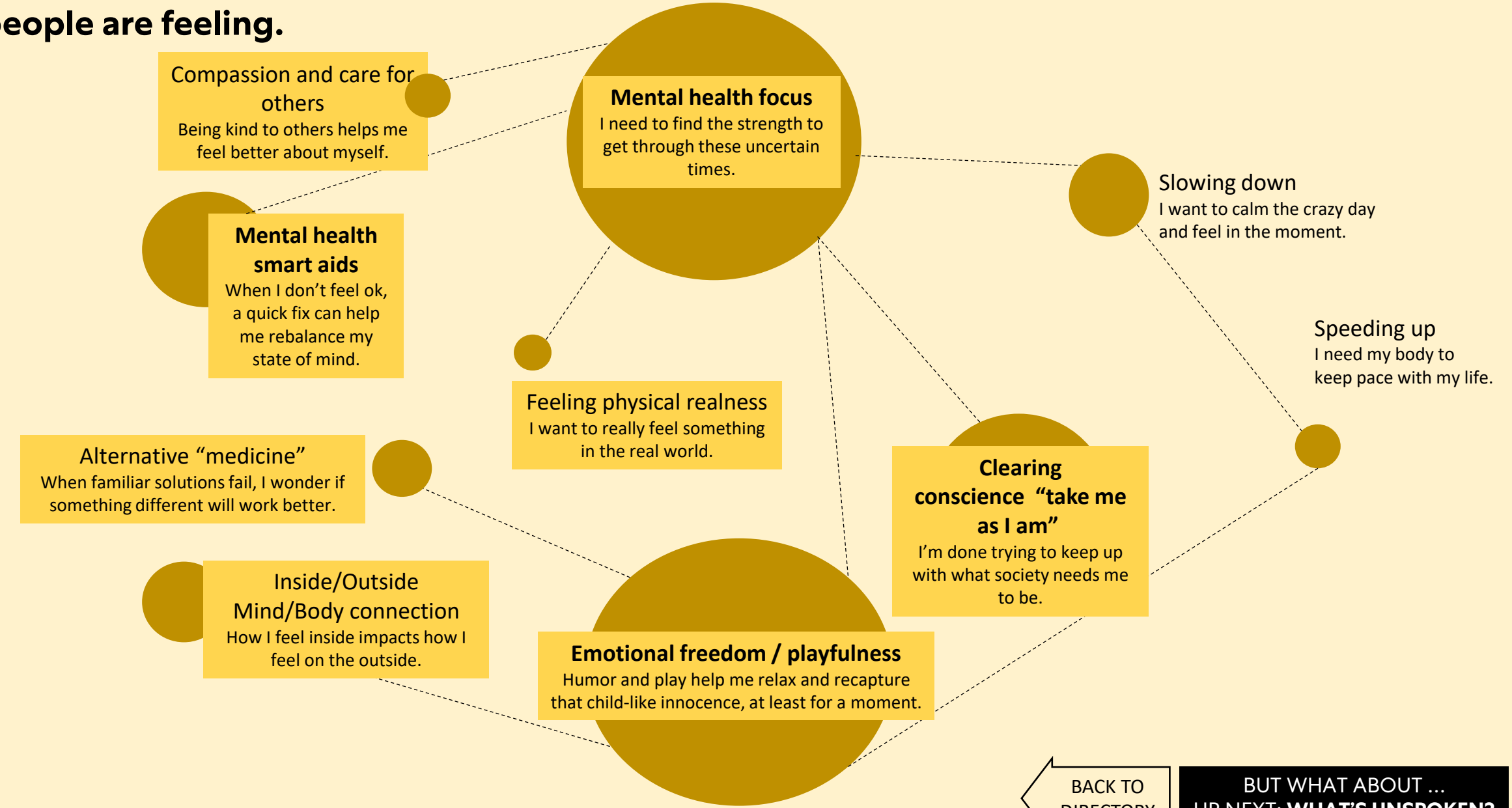
People are looking for emotional relief, by seeking connection to their inner feelings or through playful escape. How can we leverage humor, playfulness and youthfulness, inherent in many of our brands, to deliver on these needs for light and swift emotional relief?

BACK TO DIRECTORY

TELL ME MORE. UP NEXT: **THOUGHTS & FEELINGS**

WELLBEING

What people are feeling.



Size of bubbles indicate maturity (mainstream/weak)

BACK TO DIRECTORY

BUT WHAT ABOUT ...
UP NEXT: **WHAT'S UNSPOKEN?**

WELLBEING

What's unspoken.

What people are NOT talking about (and should be).

Compassion and care for others

Eco-anxiety and climate exhaustion will only get worse as it continues to take a backseat amongst overwhelming array of other issues that require more immediate attention.

Mental health focus

Mental health smart aids

How is a greater visibility of our mental health problem going to exacerbate when the systems that should be there to support it continue to fail or get under-funded?

Slowing down

What role will functional ingredients play in these two counter trends of slowing down vs speeding up?

Speeding up

Feeling physical realness

While government has bigger issues to tackle right now, regulation will continue to creep into experimental food.

Alternative "medicine"

Clearing conscience "take me as I am"

How will physical health goals be impacted by an attitude of personal acceptance for the sake of sanity?

Inside/Outside Mind/Body connection

Emotional freedom & youthful playfulness

How might this clearer connection to mind and body, and how I 'feel', be congruent or contradictory to HFSS regulation?

How is this need to have immediately satisfying moments of emotional reward creating damaging behaviors that may stick?

BACK TO DIRECTORY

SHOW ME SOME EXAMPLES.
UP NEXT: **SIGNALS OF CHANGE**

WELLBEING

Signals of change.

Compassion and care for others

Gender inclusive wellbeing (male dysmorphia)

"Chief care officer".



Buddy from LiveFreely monitors senior wellbeing

Mental health, mindfulness, taking care of self is still relevant.

Physiological stress of uncertainty

Mental health focus

Focus on better sleep

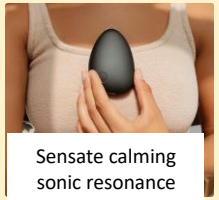
Impact of loneliness and social disconnection on physical health



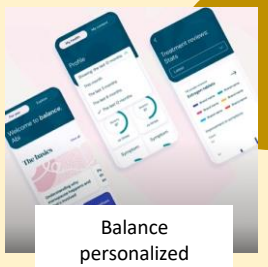
Mental health storefronts

Slowing down

Calming tools aids and zones.



Sensate calming sonic resonance



Balance personalized meditation app

Mental health smart aids

Ongoing focus on mental health and wellbeing apps, smart apps for sleep and rest.

Real time emotional checks through smart devices

Selfridges therapeutic multisensory pods



Feeling physical realness

Nature + Nurture: Obsession with gardening, outdoors, biophilia

Destination dining (immersive, magical)

Communal gardens

"Lying flat" phenomenon China



Speeding up

Nutrition taking on gummies and candy formats.



Multifunctional wellness

Popularity of Astrology and mysticism



Alternative "medicine"

Food with anti-aging properties: NAD+, Keratin

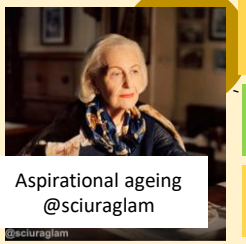
Experimental therapy; micro dosing

Clearing conscience "take me as I am"

Rethinking work "take me as I am"

Countering 'toxic positivity'

Sanctioned Indulgences: Mindful morning snacking, self-care snacking, end of day treating



Aspirational ageing @sciuraglam

Inside/Outside Mind/Body connection

Longevity and quality of life hacks

Health and diet mgt APP is growing.

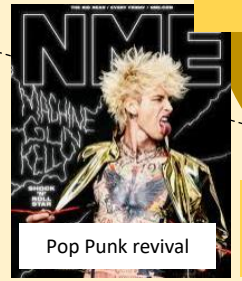
Emotional freedom & youthful playfulness

Playfulness and make believe Happiness / Wellness tourism

Meaningful indulgence, products designed with conscientiousness

Meme humor provides a sense of control.

Purposeless fun is purposeful — youthful levity is the antidote to our fear.



Pop Punk revival

Growing signal

Weak emerging signal

Size of bubbles indicate maturity (mainstream/weak)

BACK TO DIRECTORY

SO WHAT FOR US? UP NEXT: **HEADWINDS & TAILWINDS**

WELLBEING

Headwinds & Tailwinds.

headwinds

Mental health focus

CONNECT

Impact of anxiety on physical health will continue to be felt, leading people to turn to immediately satisfying snacks in countering feelings of stress, anger, fear and loneliness. This will shine a spotlight on categories like ours where consumption is moderated only by in-moment judgement.

Mental health smart aids

RECHARGE

As predictive AI nudges people to better habits, how do we make sure we don't get excluded by partnering with AI smart tech and mood modulating apps?

tailwinds

Clearing conscience

CELEBRATE

How could we create and amplify the *story* around our products so that the moment of indulgence is more permissible by being more meaningful? Why they exist, how they are made, what do they stand for? (And who makes them, the Mars family story.)

Playfulness & humor

REWARD

How can we leverage humor, inherent in many of our brands, whether it's memefication or dark humor, in our campaigns and tap into the need for light and swift emotional relief? The world is serious enough.

BACK TO DIRECTORY

BONUS! UP NEXT: **HOW TRENDS COME TO LIFE IN THE US VS CHINA**

WELLBEING

Spotlight Trend: Mental Health

	US	China
	It's about: Connection, Confidence, Relaxation	It's about: Balance, Preparation, Physical performance
Innovation	 Chicago cannabis company Wonder Wellness Co.'s low-dose hard candies for sleep, laughter and relaxation.	 This late-night snackable drink promises to make consumers wake up looking beautiful. Produced exclusively for the Chinese market, Coca-Cola's "wakeup face" appeals to two different beauty cults in China: tonic food lovers and beauty sleep ritual believers.
Media	 Energy drink brand Red Bull interviewed some of its female athlete brand ambassadors for 2021's World Mental Health Day. The campaign, hosted on its lifestyle magazine's Instagram page, explored the importance of nurturing self-esteem.	 Douyin, the short video app, is forcing users to take five-second pauses after every one in six videos viewed. The interruption cannot be swiped away and contain messages such as 'go-to bed', 'put down the phone', or 'work tomorrow'.
Trade	 Urban flagships become lush destinations answering consumers' post-Covid cravings for nature. Cult US beauty brand Glossier Seattle store features live moss, Mexican feather grass and flowering shrubs – a direct response to local fans' description of nature as a unifying force in their community.	 **Heartly Lab** launched in March 2021, focus on Mindfulness. The business consists of three modules: online content, offline experience and new consumption occasions. The target user groups include urban white-collar from fast-paced cities, active practitioners of meditation and yoga, and general users who pursue physical and mental health.

BACK TO DIRECTORY

WANT TO READ MORE? UP NEXT: SEE OUR **SOURCES**

WELLBEING

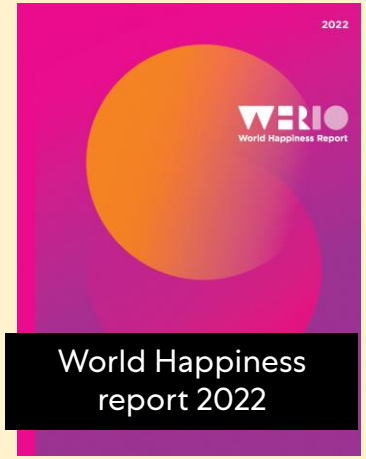
top 15 sources

- Dentsu: Health 2030
- Independent: World Happiness Report 2022
- McKinsey: Feeling Good future of wellness
- GWI: Global Wellness Economy.
- DDB: “Super protectors” & “dystopian pleasure”.
- Fjord Accenture: “Handle with Care”.
- Euromonitor: “Self Love Seekers”
- Zine: Meta22 “purposeless fun is purposeful.”
- Foresight Factory: “Mood makers”.
- Holland & Barrett: Wellness report.
- Insites Consulting: “Considered Rituals”.
- Bompass & Parr: “Geophagy of Health”.
- IPSOS: What the Future Wellness
- Mercer Marsh Benefits: MMB Health Trends
- Economist Intelligence: Healthcare in 2022

read more



Dentsu **Health 2030**



World Happiness report 2022



McKinsey **Feeling Good** report

BACK TO THE START

NEXT SECTION: **TRADE**

All sourced material was published in preparation for, or in, 2022.
Sources in quotes refers to articles within a larger report. Learn more on Foresight Knowledge Zone.

TRADE



Many consumers don't go to a store to make a purchase – they go to experience the brand, get inspired and learn about products. So it's time to start thinking about the store as a marketing opportunity, rather than a marketplace.

Trendwatching

TRADE is about

where and how we **shop**, reflecting our changing expectations.

fast facts



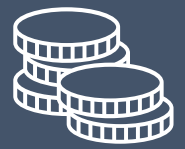
40%

of Global Chain Retail Sales by 2026 will happen online



$824M +115.7% yoy

Global consumer spending on Tik Tok



$3.3T

Social commerce projected sales by 2028 globally



80%

of retailers are moving to an omnichannel model

MARS WRIGLEY | Human Intelligence

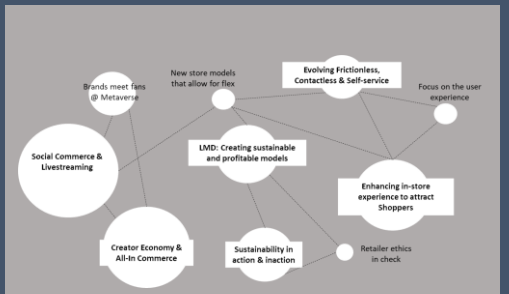
Source: Future Retail Disruption, 2022 by EDGE, Grand View Research, MIT, 2021, 2022.

TRADE

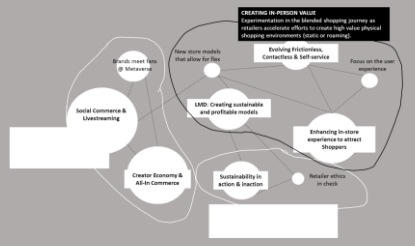
Trends maps directory:

click on a section to go straight there.

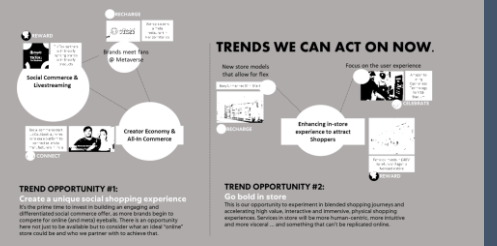




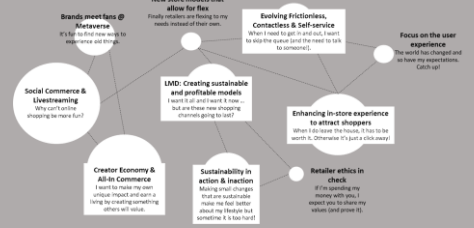
Key Trends



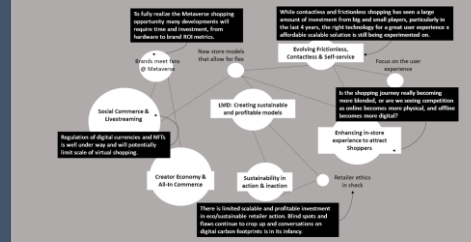
Bigger Themes



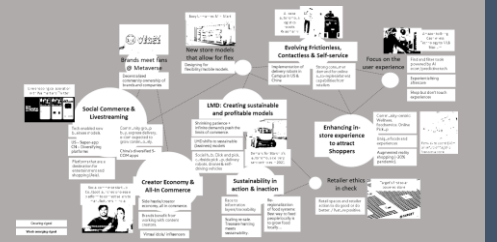
TL;DR/ Act Now



Thoughts & Feelings



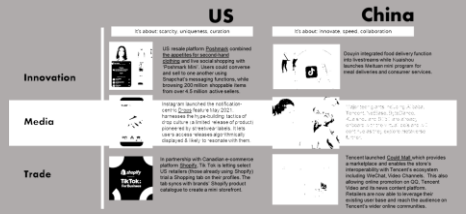
Unspoken



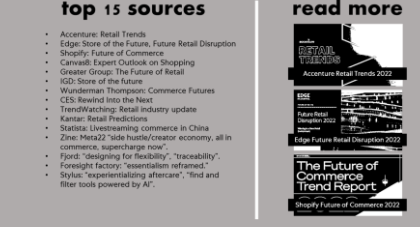
Key Signals



Opportunities



US & China Example

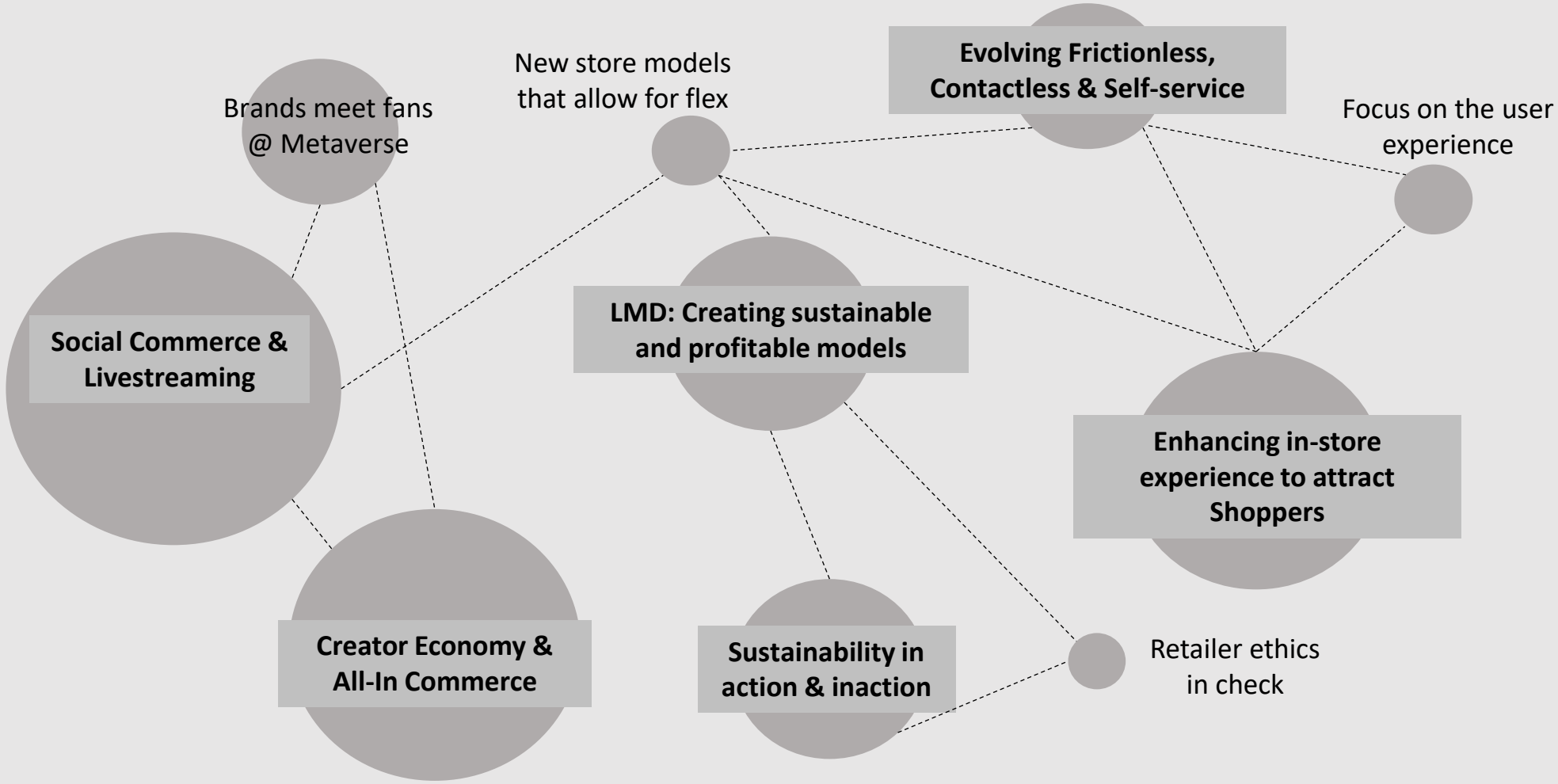


Sources

MARS WRIGLEY | Human Intelligence

TRADE

Trends map.



Size of bubbles indicate maturity (mainstream/weak)

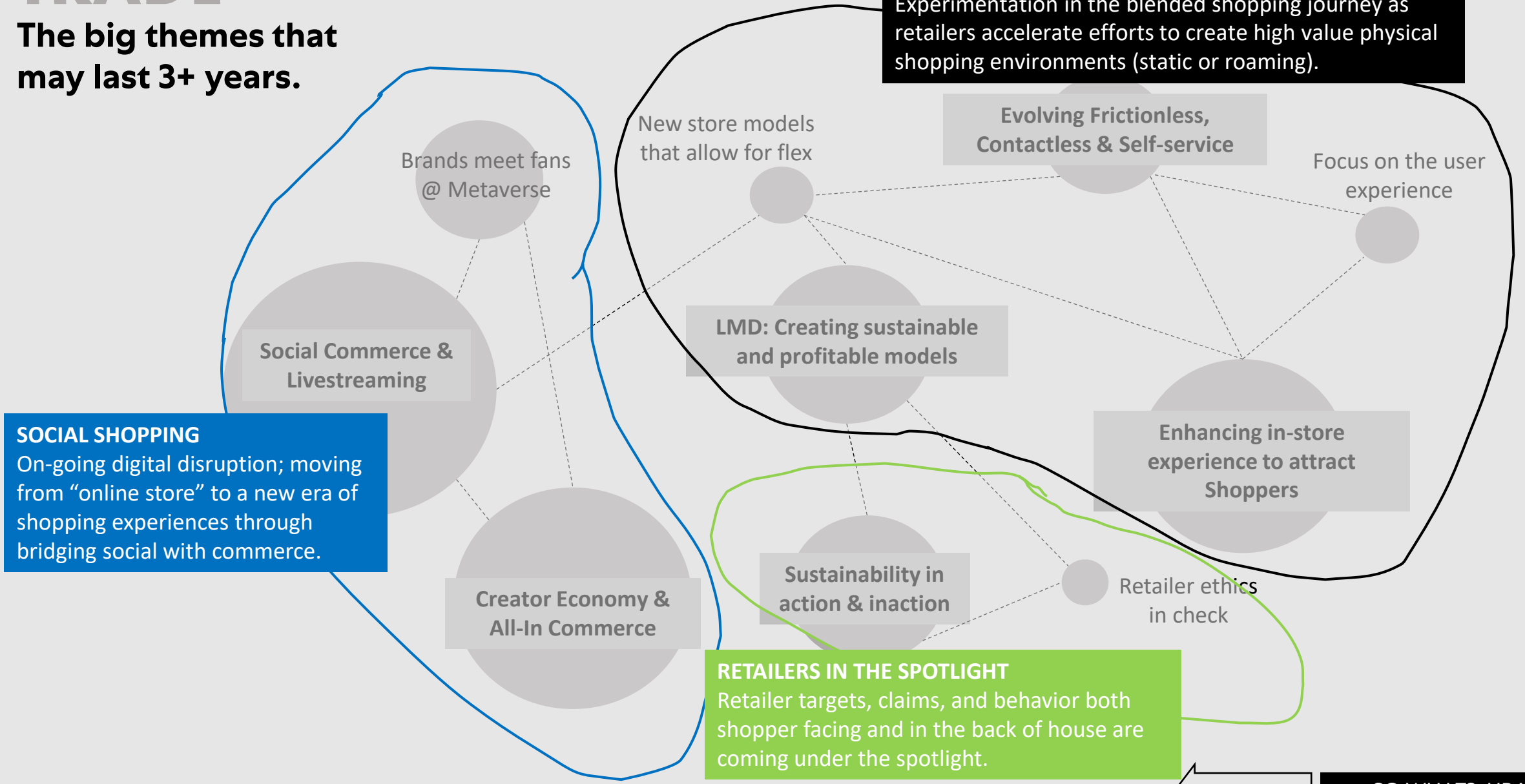
BACK TO DIRECTORY

WHAT DOES IT MEAN?
UP NEXT: **THE BIG THEMES**

TRADE

The big themes that may last 3+ years.

CREATING IN-PERSON VALUE
Experimentation in the blended shopping journey as retailers accelerate efforts to create high value physical shopping environments (static or roaming).



SOCIAL SHOPPING
On-going digital disruption; moving from "online store" to a new era of shopping experiences through bridging social with commerce.

RETAILERS IN THE SPOTLIGHT
Retailer targets, claims, and behavior both shopper facing and in the back of house are coming under the spotlight.

Size of bubbles indicate maturity (mainstream/weak)

BACK TO DIRECTORY

SO WHAT? UP NEXT: **TRENDS TO ACT ON NOW**

TL;DR TRADE

TRENDS WE CAN ACT ON NOW.

RECHARGE



Wendy's opens a meta restaurant in Horizon Worlds

REWARD

Tik Tok partners with Shopify syncing brands with Shopify products

Brands meet fans @ Metaverse

Social Commerce & Livestreaming

Creator Economy & All-In Commerce

Social commerce start up CoutLoot launches wholesale platform to connect sellers to manufacturers in India



CONNECT

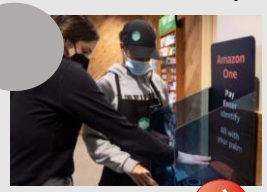
New store models that allow for flex

Boxy Unmanned Mini Mart



RECHARGE

Focus on the user experience



Amazon to bring Cashierless Technology to MLB Stadium

CELEBRATE

Enhancing in-store experience to attract Shoppers



Fenwick invests in £40M to refurbish flagship Newcastle store

REWARD

TREND OPPORTUNITY #1:

Create a unique social shopping experience

It's the prime time to invest in building an engaging and differentiated social commerce offer, as more brands begin to compete for online (and meta) eyeballs. There is an opportunity here not just to be available but to consider what an ideal "online" store could be and who we partner with to achieve that.

TREND OPPORTUNITY #2:

Go bold in store

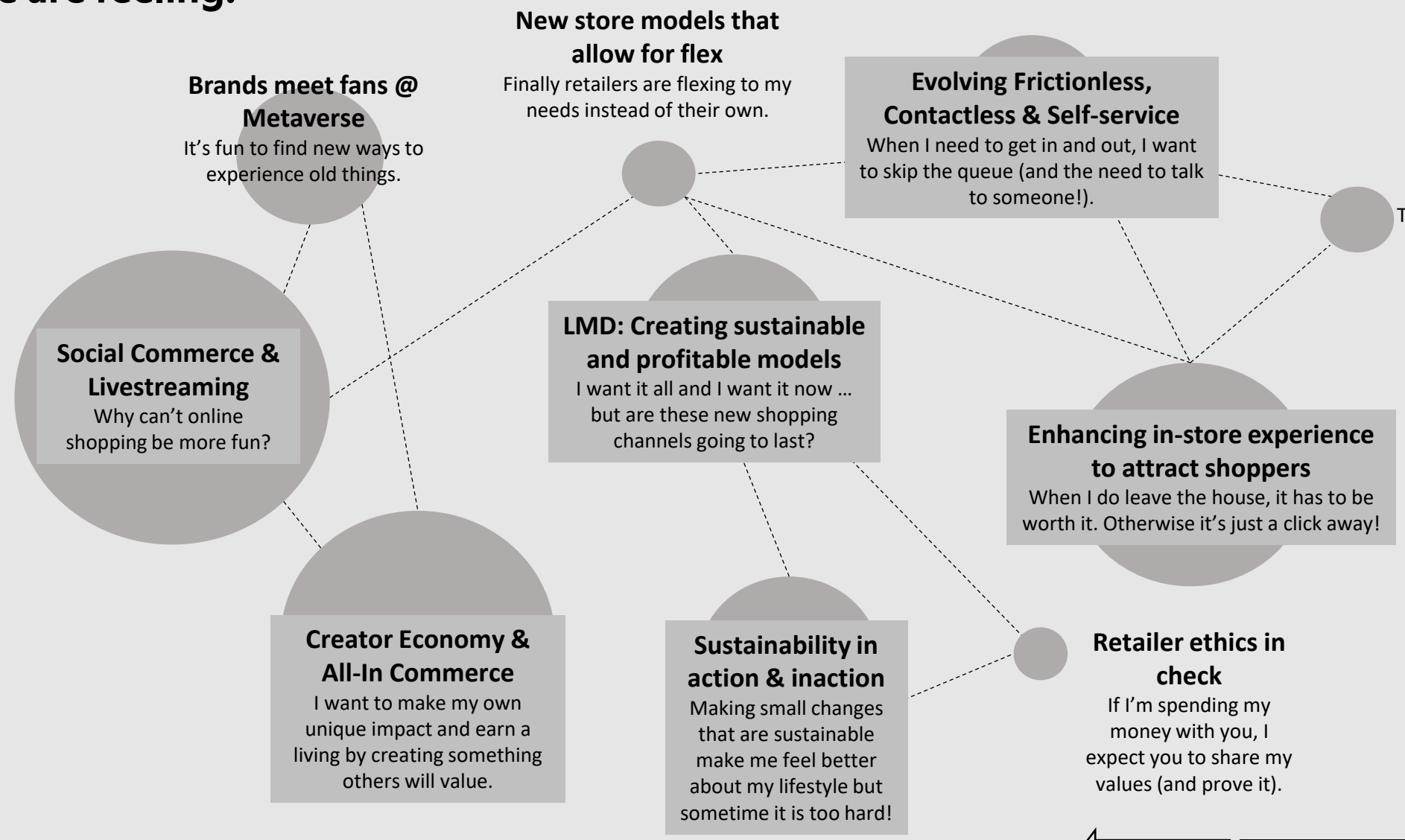
This is our opportunity to experiment in blended shopping journeys and accelerating high value, interactive and immersive physical shopping experiences. Services in store will be more human-centric, more intuitive and more visceral … and something that can't be replicated online.

BACK TO DIRECTORY

TELL ME MORE. UP NEXT: **THOUGHTS AND FEELINGS**

TRADE

What people are feeling.



Size of bubbles indicate maturity (mainstream/weak)

BACK TO DIRECTORY

BUT WHAT ABOUT …
UP NEXT: **WHAT'S UNSPOKEN?**

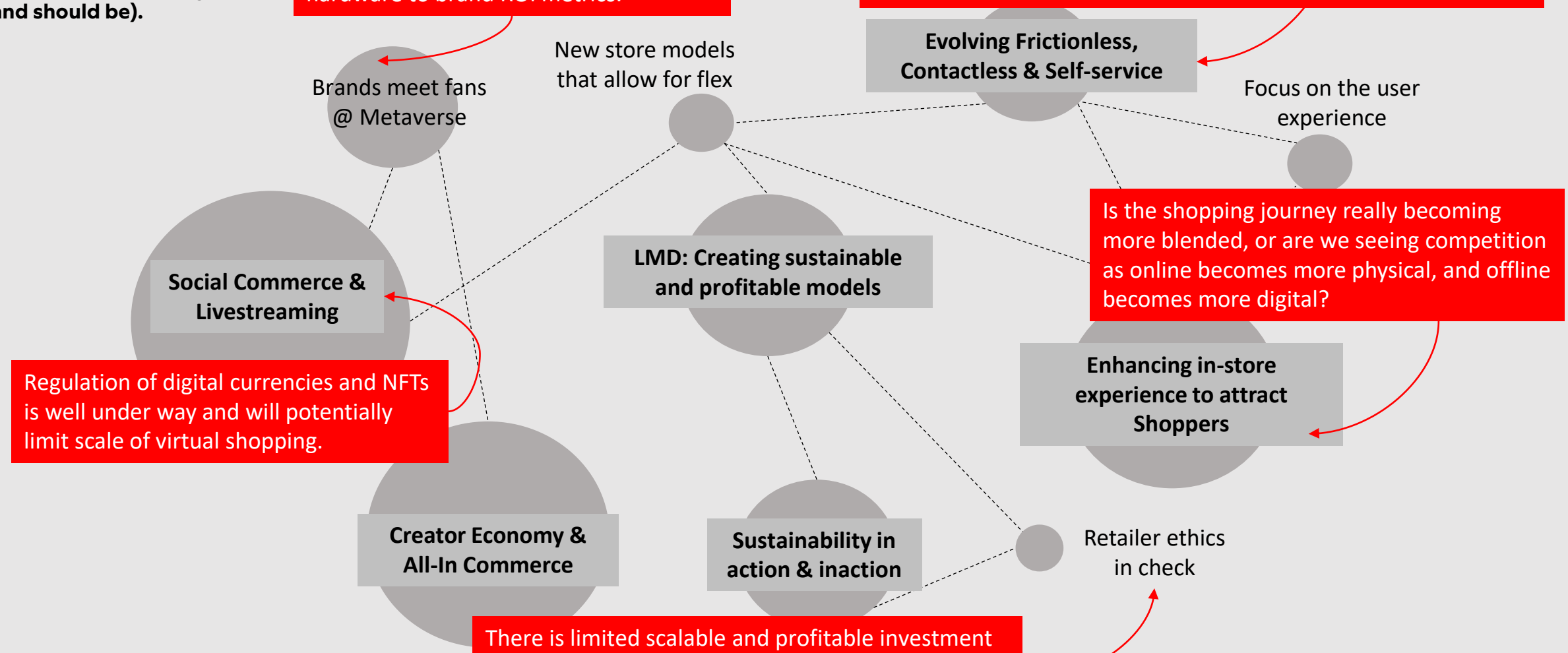
TRADE

What's unspoken.

What people are NOT talking about (and should be).

To fully realize the Metaverse shopping opportunity many developments will require time and investment, from hardware to brand ROI metrics.

While contactless and frictionless shopping has seen a large amount of investment from big and small players, particularly in the last 4 years, the right technology for a great user experience x affordable scalable solution is still being experimented on.



BACK TO DIRECTORY

SHOW ME SOME EXAMPLES. UP NEXT: **SIGNALS OF CHANGE**

TRADE

Signals of change.



Brands meet fans @ Metaverse

Decentralized community ownership of brands and companies

Boxy Unmanned Mini Mart



New store models that allow for flex

Designing for flexibility/mobile models.

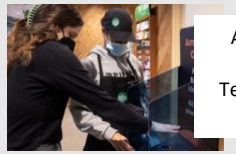


Alibaba autonomous logistics robots #xiaomanlv

Evolving Frictionless, Contactless & Self-service

Implementation of delivery robots in Campus in US & China

Strong consumer demand for online auto-replenishment capabilities from retailers



Amazon to Bring Cashierless Technology to MLB Stadium

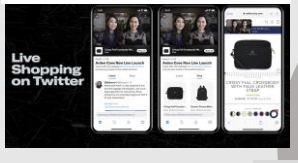
Focus on the user experience

Find and filter tools powered by AI ecom/predictive tech

Experientialising aftercare

Shop but don't touch experiences

Live shopping collaboration with Walmart and Twitter



Social Commerce & Livestreaming

Tech enabled new business models.

US – Super-app
CN – Diversifying platforms

Platforms that are a destination for entertainment and shopping (Asia).

Community group buy, express delivery, e-com expected to grow continuously.

China's diversified S-COM apps

LMD: Creating sustainable and profitable models

Shrinking patience + infinite demands push the limits of commerce.

LMD shifts to sustainable (business) models

Social hub, Click and pick, curbside pick up, delivery robots, drones & self-driving vehicles



Demand for Starship's autonomous delivery service triples in 2021

Enhancing in-store experience to attract Shoppers

Community-centric; Wellness, foodservice, Online Pickup

Unique foods and experiences

Augmented reality shopping (+20% pandemic).



Fenwick to spend £40m on refurb of flagship Newcastle store

Social commerce start up CoutLoot launches wholesale platform to connect sellers to manufacturers in India



Creator Economy & All-In Commerce

Side hustle/creator economy, all in commerce.

Brands benefit from working with content creators.

Virtual idols/ influencers

Sustainability in action & inaction

Race to information layers/traceability

Scaling re-sale. Treasure hunting meets sustainability.

Re-regionalization of food systems: Best way to feed people locally is to grow food locally...

Retailer ethics in check

Retail spaces and retailer action to do good or do better. / Nature positive.



Target's first solar powered store

Growing signal

Weak emerging signal

Size of bubbles indicate maturity (mainstream/weak)

BACK TO DIRECTORY

SO WHAT FOR US? UP NEXT: **HEADWINDS & TAILWINDS**

TRADE

Headwinds & Tailwinds.

headwinds

Social shopping

CONNECT

ALL brands are trying to fight for the finite focus from people online. While Social Commerce is diversifying, how we can test & learn faster to decode what are the critical elements for our categories to engage and inspire consumers? How do we partner with the “agent” who could be hundreds of KOC instead of category man from a retailer?

Retailers in the Spotlight

CELEBRATE

As people demand business to act more ethically, pressure on Retailers could pass to suppliers – how we could partner with Retailers in helping them in achieving their purpose?

tailwinds

Creating in-person value

REWARD

As retailers are improving their service and thinking in a more human-centric way, this could provide us a better medium to provide a improved experience to shoppers, uniquely leveraging our small format in-store executional expertise.

Enhancing in-store experiences

REWARD

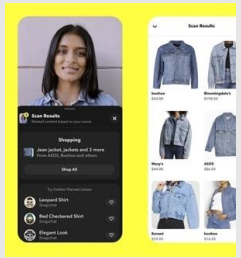
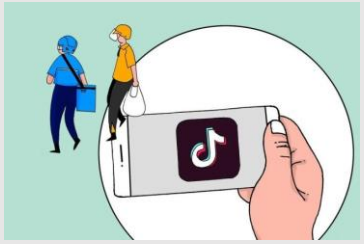
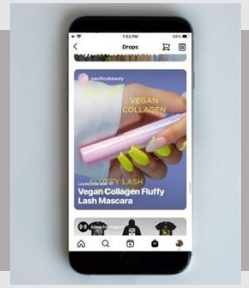
People find visceral experiences more memorable and more inspiring to take action; we have a wealth of experience in immersive shopping environments as a starting point for elevating that shopping trip into something of greater value that can’t be replicated online (just yet).

BACK TO DIRECTORY

BONUS! UP NEXT: **HOW TRENDS COME TO LIFE IN THE US VS CHINA**

TRADE

Spotlight Trend: Social Commerce

	US	China
	It's about: scarcity, uniqueness, curation	It's about: innovate, speed, collaboration
Innovation	 US resale platform Poshmark combined the appetites for second-hand clothing and live social shopping with 'Poshmark Mini'. Users could converse and sell to one another using Snapchat's messaging functions, while browsing 200 million shoppable items from over 4.5 million active sellers.	 Douyin integrated food delivery function into livestreams while Kuaishou launches Meituan mini program for meal deliveries and consumer services.
Media	 Instagram launched the notification-centric Drops feature May 2021, harnesses the hype-building tactics of drop culture (a limited release of product) pioneered by streetwear labels. It lets users access releases algorithmically displayed & likely to resonate with them.	 Major tech giants including Alibaba, Tencent, NetEase, ByteDance, Kuaishou and Bilibili are already onboard with the virtual idols and will continue as they explore metaverse further.
Trade	 In partnership with Canadian e-commerce platform Shopify, Tik Tok is letting select US retailers (those already using Shopify) trial a Shopping tab on their profiles. The tab syncs with brands' Shopify product catalogue to create a mini storefront.	 Tencent launched Could Mall which provides a marketplace and enables the store's interoperability with Tencent's ecosystem including WeChat, Video Channels. This also allowing online promotion on QQ, Tencent Video and its news content platform. Retailers are now able to leverage their existing user base and reach the audience on Tencent's wider online communities.

BACK TO DIRECTORY

WANT TO READ MORE? UP NEXT: SEE OUR **SOURCES**

top 15 sources

- Accenture: Retail Trends
- Edge: Store of the Future, Future Retail Disruption
- Shopify: Future of Commerce
- Canvas8: Expert Outlook on Shopping
- Greater Group: The Future of Retail
- IGD: Store of the future
- Wunderman Thompson: Commerce Futures
- CES: Rewind Into the Next
- TrendWatching: Retail industry update
- Kantar: Retail Predictions
- Statista: Livestreaming commerce in China
- Zine: Meta22 “side hustle/creator economy, all in commerce, supercharge now”.
- Fjord: “designing for flexibility”, “traceability”.
- Foresight factory: “essentialism reframed.”
- Stylus: “experientializing aftercare”, “find and filter tools powered by AI”.

read more



Accenture Retail Trends 2022



Edge Future Retail Disruption 2022



Shopify Future of Commerce 2022

BACK TO THE START

NEXT SECTION: **VIRTUAL LIVING**

All sourced material was published in preparation for, or in, 2022.
Sources in quotes refers to articles within a larger report. Learn more on Foresight Knowledge Zone.

VIRTUAL LIVING



The new tools that transform humanity always look like toys at first.

Raj Gokal, co-founder, Solana

VIRTUAL LIVING is about

the influence of **technology** on how we connect, transact and enjoy our lives.

fast facts



62.5% % 92.1%

Global Internet and mobile access penetration
+192 million vs. LY; +4.0% YOY change



+10.1%; +424 Million

Active Social Media Users in 2021



6H 58M (+4M vs. LY)

Average daily time spent on Internet



$178.7B +14.4%

Video gaming industry with 77% higher growth than predicted in 2016. New projections est $268B value by 2025.

Source: Digital 2022 Global Overview Report, WEPC 2021

VIRTUAL LIVING

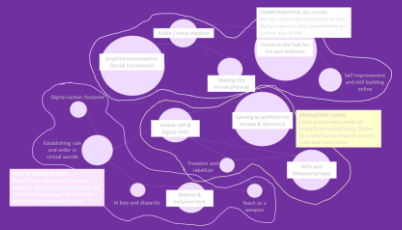
Trends maps directory:

click on a section to go straight there.





Key Trends



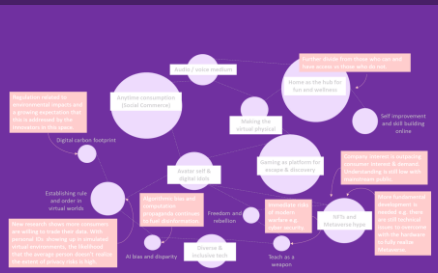
Bigger Themes



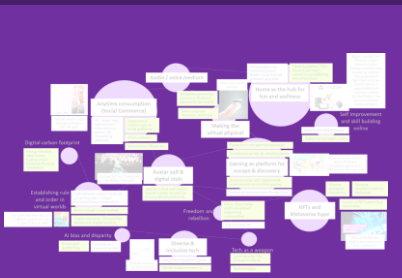
TL; DR/ Act Now



Thoughts & Feelings



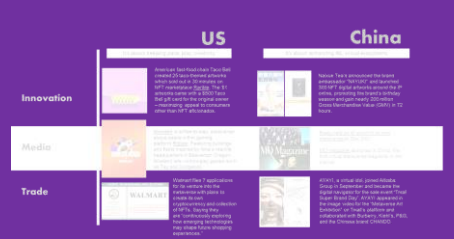
Unspoken



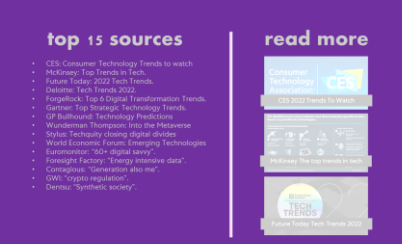
Key Signals



Opportunities



US & China Example

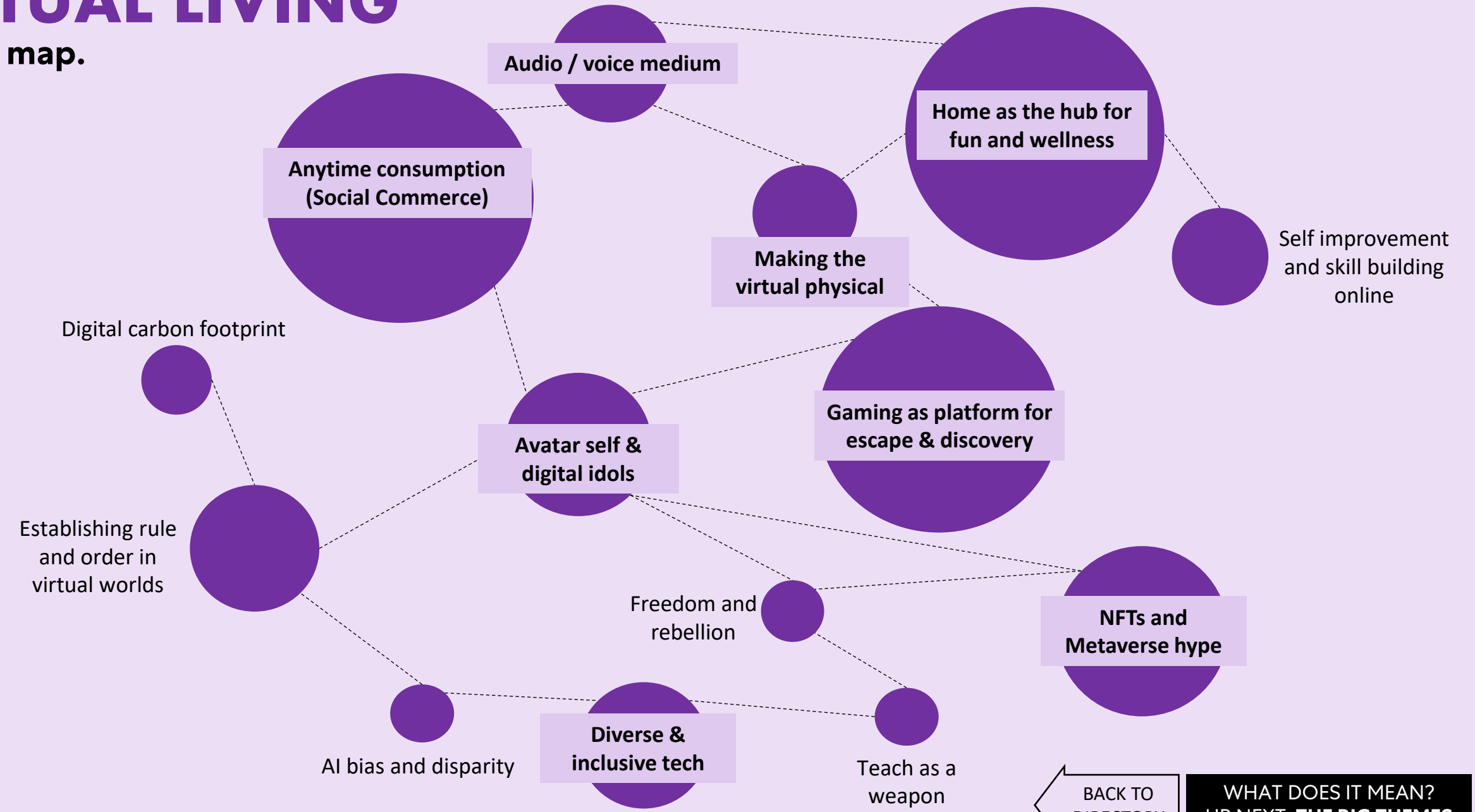


Sources

MARS WRIGLEY | Human Intelligence

VIRTUAL LIVING

Trends map.



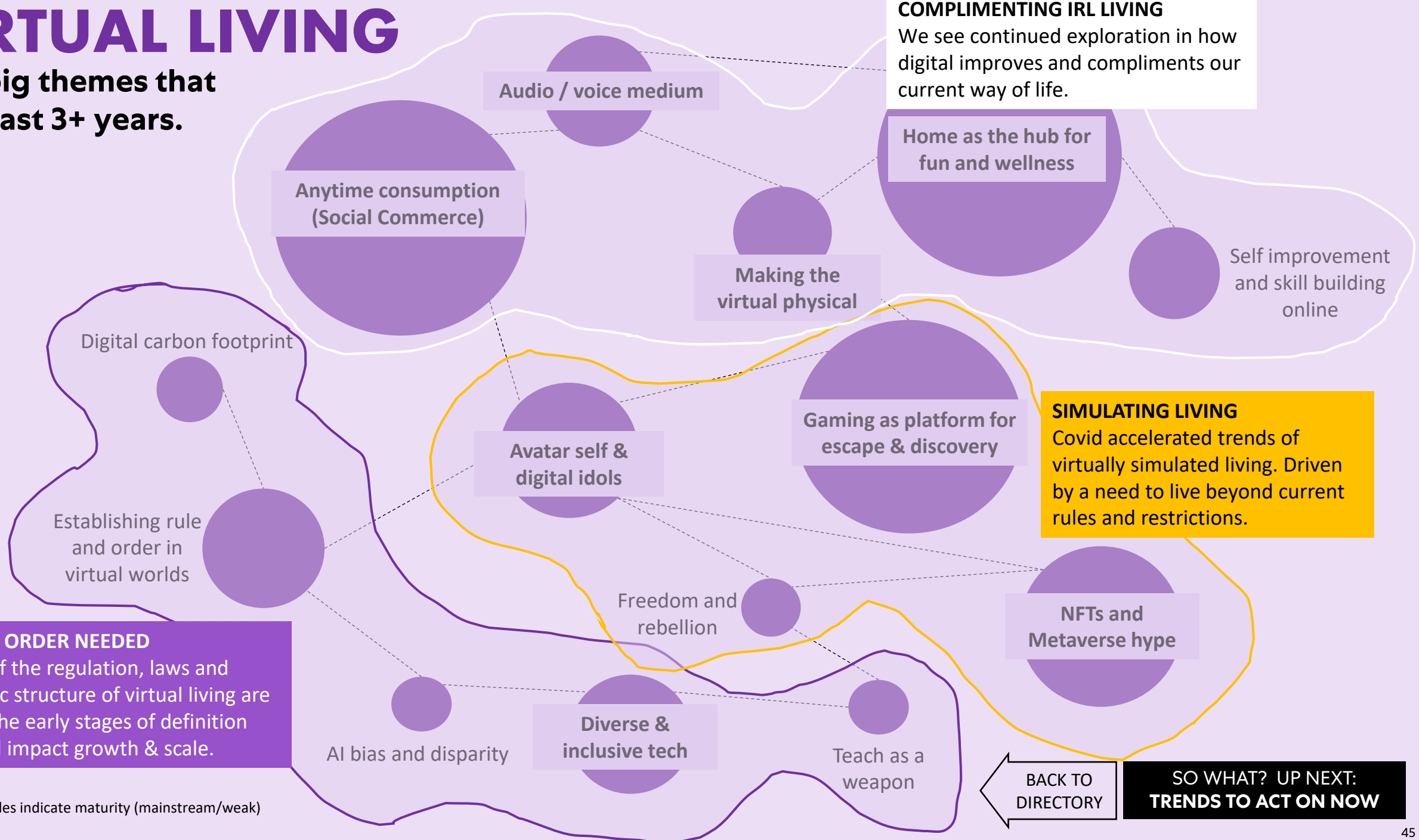
Size of bubbles indicate maturity (mainstream/weak)

BACK TO DIRECTORY

WHAT DOES IT MEAN?
UP NEXT: **THE BIG THEMES**

VIRTUAL LIVING

The big themes that may last 3+ years.



COMPLIMENTING IRL LIVING
We see continued exploration in how digital improves and compliments our current way of life.

SIMULATING LIVING
Covid accelerated trends of virtually simulated living. Driven by a need to live beyond current rules and restrictions.

RULE & ORDER NEEDED
Many of the regulation, laws and systemic structure of virtual living are still in the early stages of definition and will impact growth & scale.

Size of bubbles indicate maturity (mainstream/weak)

BACK TO DIRECTORY

SO WHAT? UP NEXT: **TRENDS TO ACT ON NOW**

TL;DR VIRTUAL LIVING

TRENDS WE CAN ACT ON NOW.

CONNECT



Animal Crossing New Horizons (social simulation game) sold 34M units in the last year

Gaming as platform for escape & discovery

RECHARGE



Apple, Google, and Amazon have formed an industry coalition with Matter, the 'smart home standard'.

Home as the hub for fun and wellness

REWARD

Alibaba, Tencent use virtual idols as promoters



Avatar self & digital idols

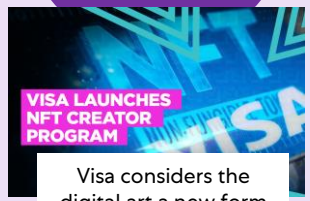
Establishing rule and order in virtual worlds



Congress Has Introduced 35 Bills Focused On U.S. Crypto Policy in 2021.

RECHARGE

NFTs and Metaverse hype



Visa considers the digital art a new form of e-commerce

CONNECT

Diverse & inclusive tech



Alibaba version for the elderly

REWARD

TREND OPPORTUNITY #1:

Escapism through 'smart' living

Covid accelerated trends of virtually simulated living, where you can be who you want to be and play by your own rules. Smart tech is not the driver here but the enabler. How can we partner with early adopters to actively learn and pilot in this virtual space?

TREND OPPORTUNITY #2:

Consider upcoming regulatory parameters

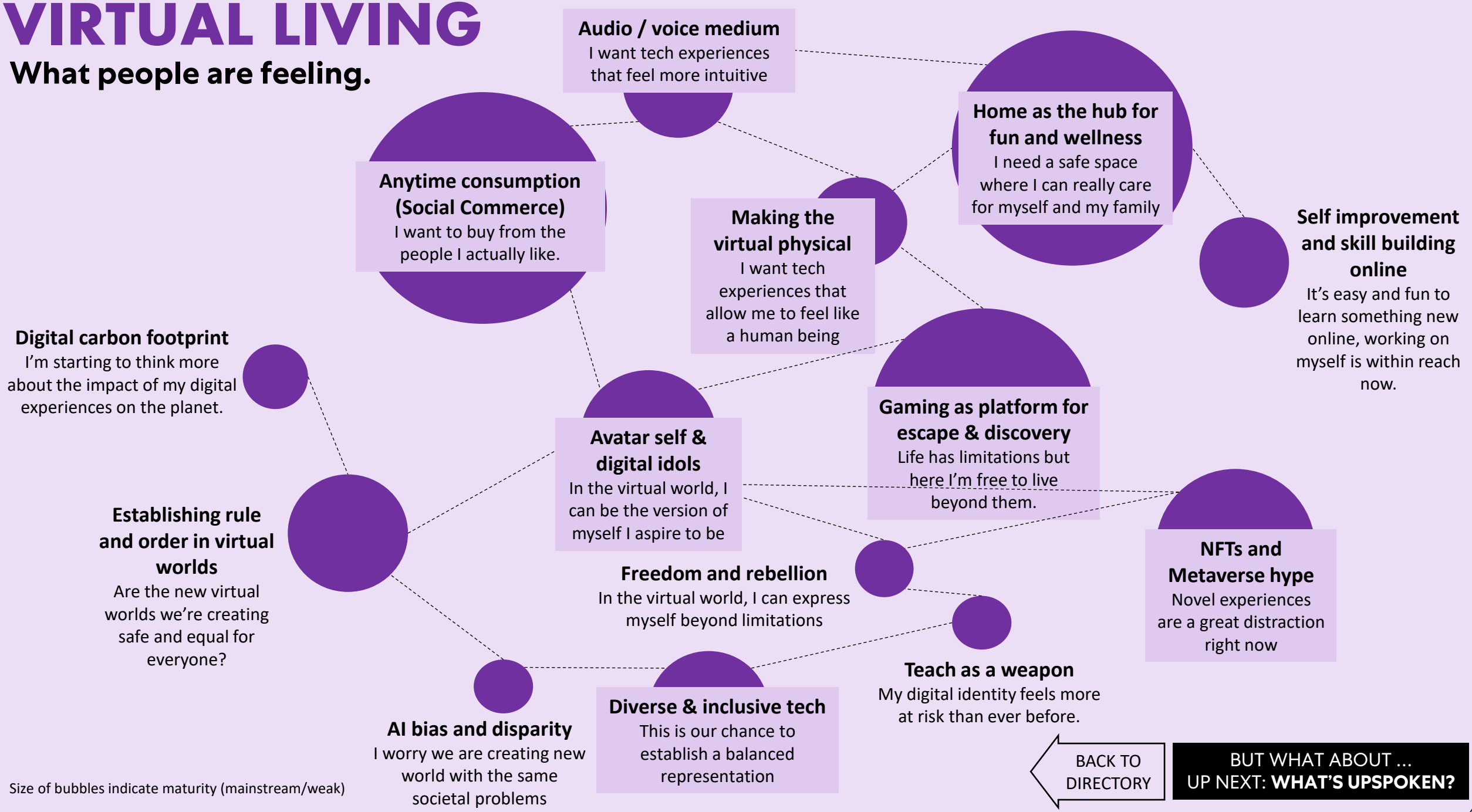
Many of the digital advancements we are excited about, and are seeing fast investment within (crypto, NFTs, Metaverse, AI), will evolve when they are guard railed by regulation. We should continue to experiment while considering how we can co-create a fair and equitable vision for these.

BACK TO DIRECTORY

TELL ME MORE. UP NEXT: **THOUGHTS AND FEELINGS**

VIRTUAL LIVING

What people are feeling.



Size of bubbles indicate maturity (mainstream/weak)

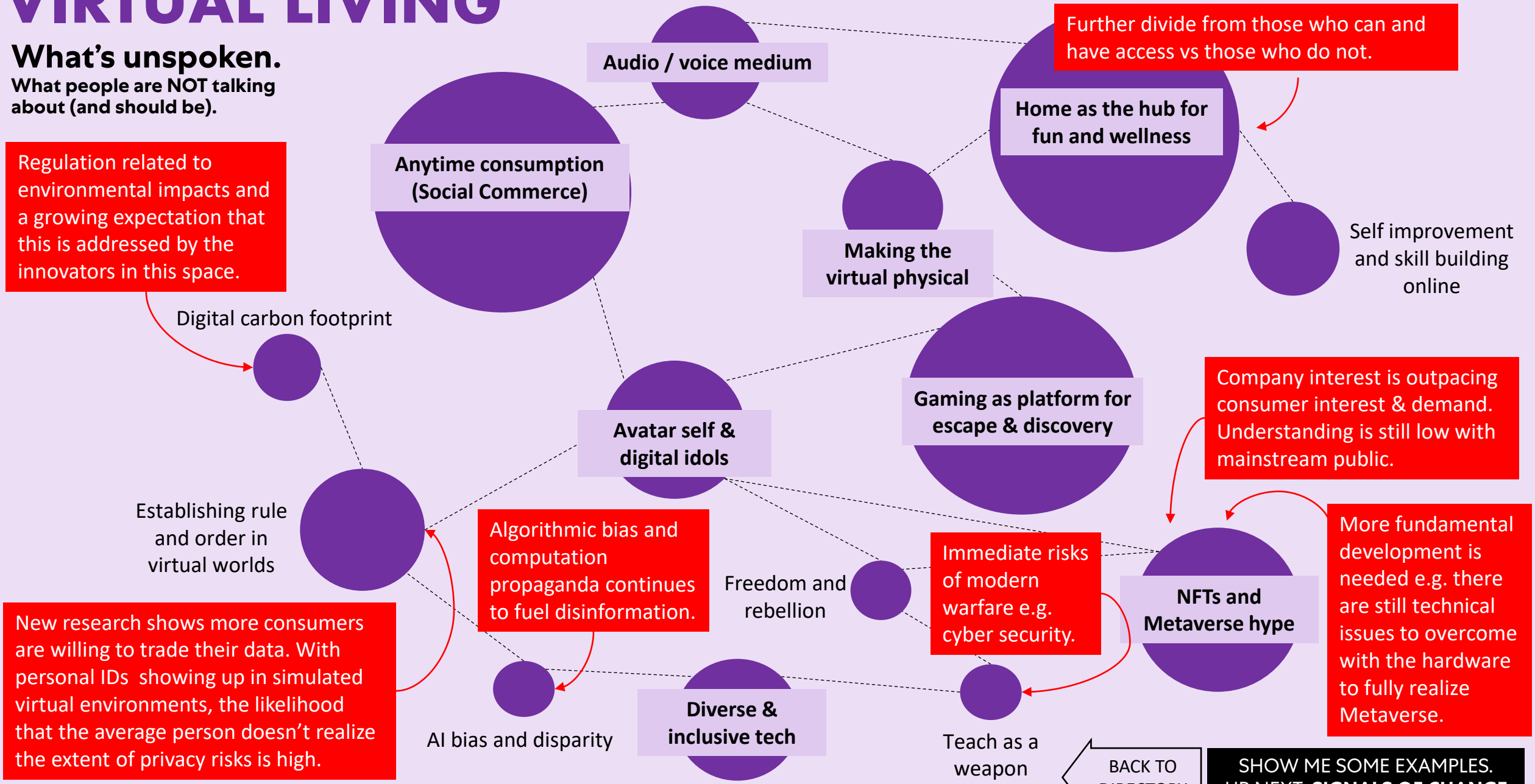
BACK TO DIRECTORY

BUT WHAT ABOUT ...
UP NEXT: **WHAT'S UPSPOKEN?**

VIRTUAL LIVING

What's unspoken.

What people are NOT talking about (and should be).



Size of bubbles indicate maturity (mainstream/weak)

BACK TO DIRECTORY

SHOW ME SOME EXAMPLES. UP NEXT: **SIGNALS OF CHANGE**

VIRTUAL LIVING

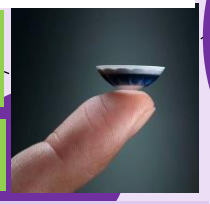
Signals of change.

Audio / voice medium

Virtual/live events that connect to IRL (food delivery for the event).

Brain-computer interfaces, smell tech

Mojo vision smart contacts



Home as the hub for fun and wellness

Home makeovers; enhancing home theatre, smart homes, premium upgrades

Home is a shelter / Our house is our heart, central to our wellbeing and all functions



Apple, Google, and Amazon, major manufacturers Samsung and LG and smaller, accessory-focused players Nanoleaf and Eve, have formed an unprecedented industry coalition behind Matter, the upcoming 'smart home standard'.

Anytime consumption (Social Commerce)

US – Super-app; extension into other sites e.g. twitter. CN – Diversifying platforms

Expansion of creator tools on social platforms.

Viral commerce

Virtual idols/ influencers



TikTok's new in-app shopping feature with Shopify

Making the virtual physical

Self improvement and skill building online

Edtech and digital courses

Digital mental health coach

Gaming as platform for escape & discovery

Expansion in the gaming metaverse.

Socialization growth & campfire games.



Animal Crossing New Horizons (social simulation game) sold 34M units in the last year

Boomers, those with disabilities & underserved communities gaming.

Interactive gaming events for fandoms.

Avatar self & digital idols



Virtual Idol Luo Tianyi has 5m Weibo followers

Identity is fluid and I expect brands to keep up with me (cross pollinate platforms).

Digital carbon footprint

Energy intensive data centers fueling virtual living see focus on renewables

Establishing rule and order in virtual worlds

Fight between current financial/ social structure ⇔ Digital currency/ Internet regulations

ROI of virtual / social markets.

Crypto regulation. 50 countries already ban digital currency.



Congress Has Introduced 35 Bills Focused On U.S. Crypto Policy in 2021.

Freedom and rebellion

DAOs, cloud native platforms and self supporting communities.

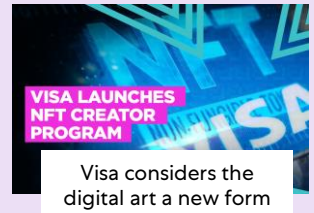
Cryptocurrencies

NFTs and Metaverse hype

Virtually simulated everything.

Growing investment behind metaverse.

Growth of NFTs and virtual retail estate



Visa considers the digital art a new form of e-commerce

AI bias and disparity

AI race and gender bias

Limitations based on access

Diverse & inclusive tech



Alibaba version for the elderly

Vision/hearing optimizations

Gender balance in tech co.

Tech as a weapon

Cyber security; 31% increase in attacks

Disinformation

Growing signal

Weak emerging signal

Size of bubbles indicate maturity (mainstream/weak)

BACK TO DIRECTORY

SO WHAT FOR US? UP NEXT: **HEADWINDS & TAILWINDS**

VIRTUAL LIVING

Headwinds & Tailwinds.

headwinds

Establishing rule & order

RECHARGE

As tech giants are building out the infrastructure for virtual worlds and rules and orders are yet to be defined, how can we be ahead of the curve in better navigating what's the favorable future for us ... and more equitable for our consumers?

Simulated living

REWARD

Virtual living removes a lot of restriction in real life. It is an exciting place for many and offers a level of predictability in dystopian times full of uncertainties. Early adaptors have started to build out their simulated living in the virtual world; while it might seem far away for some, there are people already living most of their time virtually – what we can learn from them so we can better anticipate the future?

tailwinds

Anytime consumption

REWARD

The consumer journey is continuously evolving and getting fragmented through technology. How can we start to think about how defined moments of Connect or Reward will be replicated, or improved, in virtual worlds? How do we monetize that? How do we experientialize that?

NFTs

CONNECT

While it may feel like we are playing catchup here, it's worth remembering most brands are in the same boat. As we continue to build our e-com offer, how can we add partnerships with the right agents that will allow us to pilot an extended commerce proposition that captures NFT potential and taps into the places they thrive – communities.

BACK TO DIRECTORY

BONUS! UP NEXT: **HOW TRENDS COME TO LIFE IN THE US VS CHINA**

VIRTUAL LIVING

Spotlight Trend: Metaverse

	US	China
	It's about: keeping pace, play, creativity	It's about: enhancing IRL, virtual ecosystems
Innovation	 American fast-food chain Taco Bell created 25 taco-themed artworks which sold out in 30 minutes on NFT marketplace Rarible. The $1 artworks came with a $500 Taco Bell gift card for the original owner – maximizing appeal to consumers other than NFT aficionados.	 Naixue Tea's announced the brand ambassador "NAYUKI" and launched 300 NFT digital artworks around the IP online, promoting the brand's birthday season and gain nearly 200 million Gross Merchandise Value (GMV) in 72 hours.
Media	 Nikeland is a free-to-play, metaverse-esque space within gaming platform Roblox. Featuring buildings and fields inspired by Nike's real-life headquarters in Beaverton, Oregon, Nikeland lets visitors play games such as Tag and Dodgeball.	 Baidu held an AI event in its own metaverse on Dec 2021. MO magazine launched in China, the first virtual Metaverse magazine in the market.
Trade	 Walmart files 7 applications for its venture into the metaverse with plans to create its own cryptocurrency and collection of NFTs. Saying they are "continuously exploring how emerging technologies may shape future shopping experiences."	 AYAYI, a virtual idol, joined Alibaba Group in September and became the digital navigator for the sale event "Tmall Super Brand Day". AYAYI appeared in the image video for the "Metaverse Art Exhibition" on Tmall's platform and collaborated with Burberry, Kiehl's, P&G, and the Chinese brand CHANDO.

BACK TO DIRECTORY

WANT TO READ MORE? UP NEXT: SEE OUR **SOURCES**

VIRTUAL LIVING

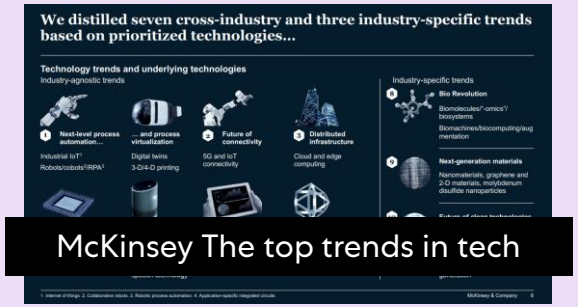
top 15 sources

- CES: Consumer Technology Trends to watch
- McKinsey: Top Trends in Tech.
- Future Today: 2022 Tech Trends.
- Deloitte: Tech Trends 2022.
- ForgeRock: Top 6 Digital Transformation Trends.
- Gartner: Top Strategic Technology Trends.
- GP Bullhound: Technology Predictions
- Wunderman Thompson: Into the Metaverse
- Stylus: Techquity closing digital divides
- World Economic Forum: Emerging Technologies
- Euromonitor: “60+ digital savvy”.
- Foresight Factory: “Energy intensive data”.
- Contagious: “Generation also me”.
- GWI: “crypto regulation”.
- Dentsu: “Synthetic society”.

read more



CES 2022 Trends To Watch



McKinsey The top trends in tech



Future Today Tech Trends 2022

All sourced material was published in preparation for, or in, 2022.
Sources in quotes refers to articles within a larger report. Learn more on Foresight Knowledge Zone.

BACK TO THE START

NEXT SECTION: **DECISION MAKING**

DECISION MAKING



We find a world ensnared in a vicious cycle of distrust, fueled by a growing lack of faith in media and government. Through disinformation and division, these two institutions are feeding the cycle and exploiting it for commercial and political gain.

Edelman Trust Barometer 2022

DECISION MAKING is about

The external forces and inside voices that guide our **choices**.

fast facts



83 v 43 pts

Trust index rating in China vs US, an all-time high divergence gap



50 year high

Democrats and Republicans ideological divide in America



$554 B

AI market value projected at 2024, from $327 B in 2021. 63% of consumers believe AI will solve complex problems in the future



52%

Believe business isn't doing enough on climate change, with similar sentiment for other societal problems

Source: Edelman Trust Barometer, Pew research, IDC, PWC, 2021, 2022

DECISION MAKING

Trends maps directory:

click on a section to go straight there.





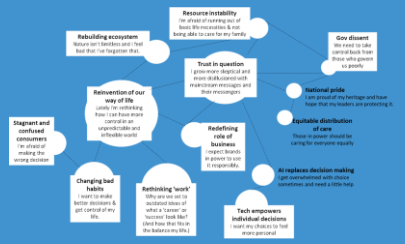
Key Trends



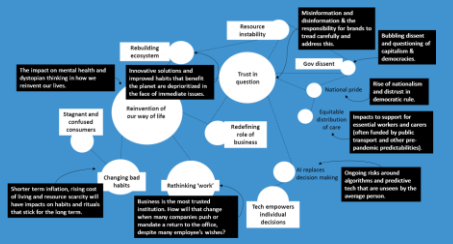
Bigger Themes



TL;DR/ Act Now



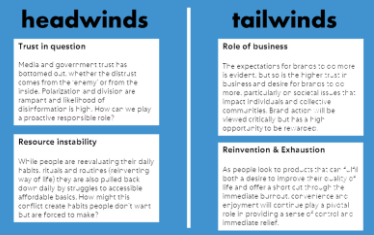
Thoughts & Feelings



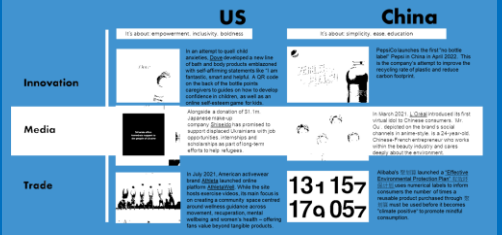
Unspoken



Key Signals



Opportunities



US & China Example

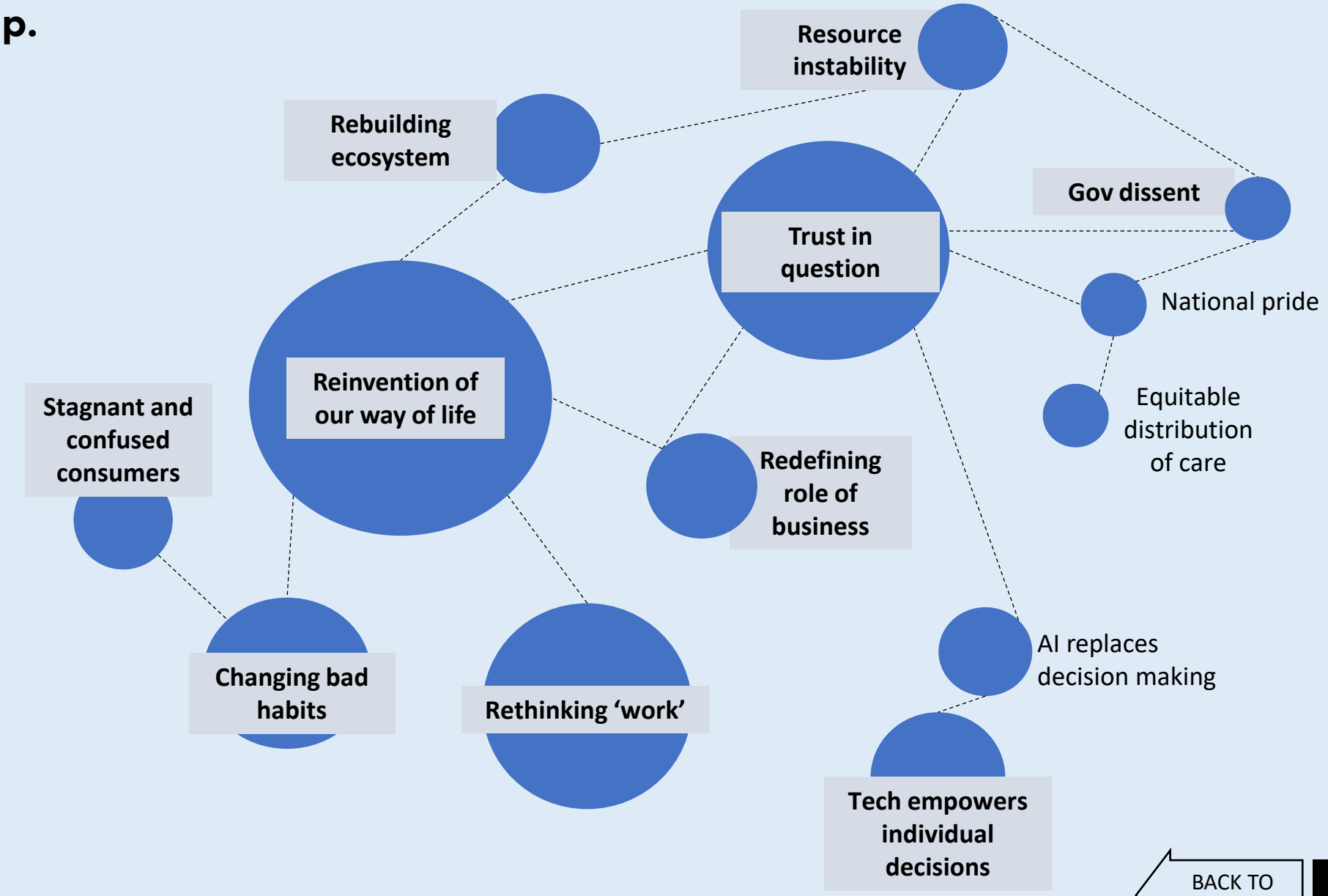


Sources

MARS WRIGLEY | Human Intelligence

DECISION MAKING

Trends map.



Size of bubbles indicate maturity (mainstream/weak)

BACK TO DIRECTORY

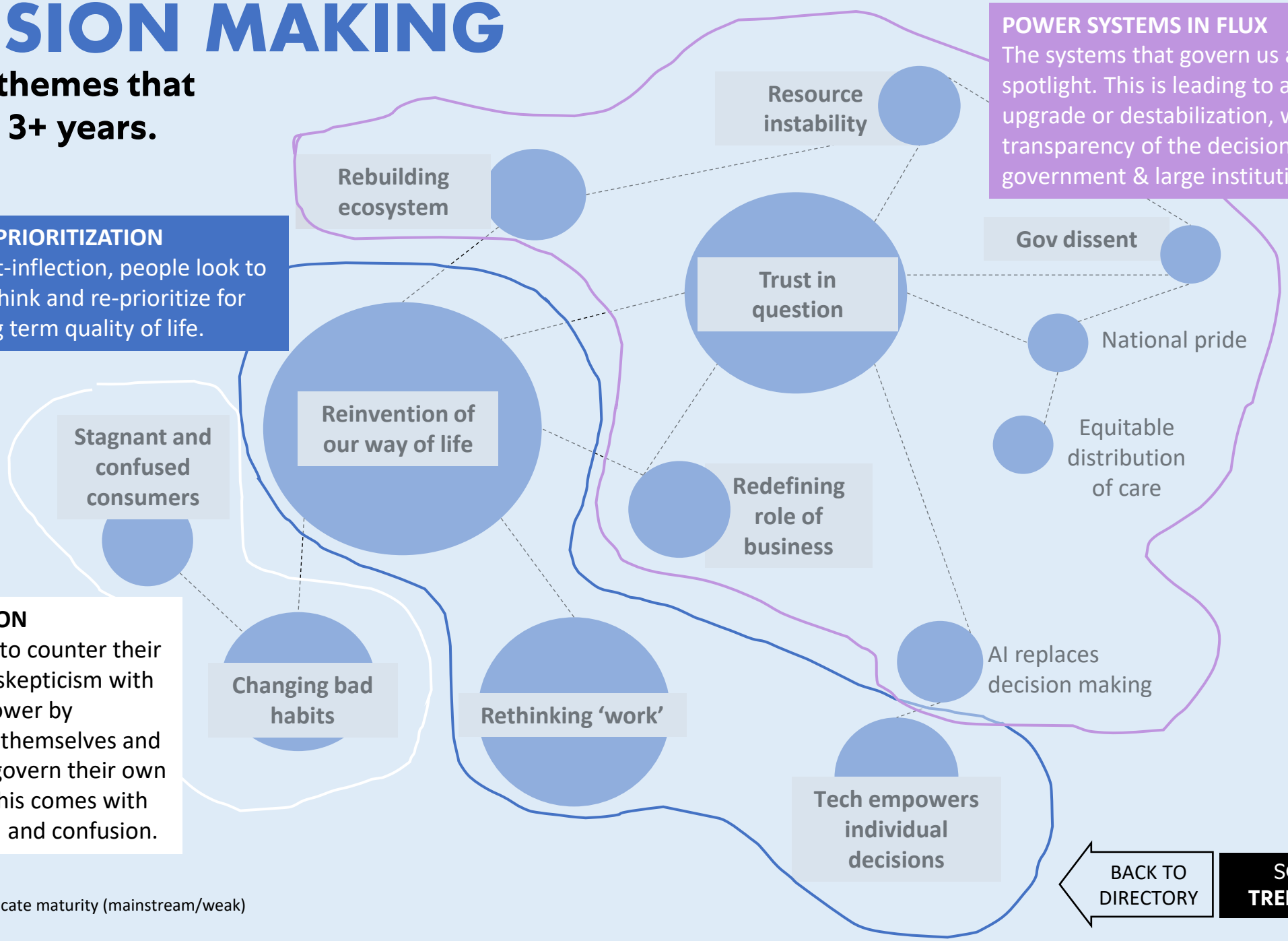
WHAT DOES IT MEAN?
UP NEXT: **THE BIG THEMES**

DECISION MAKING

The big themes that may last 3+ years.

POWER SYSTEMS IN FLUX
The systems that govern us are under the spotlight. This is leading to a revamp, upgrade or destabilization, with greater transparency of the decisions and outcomes government & large institutions make.

RE-PRIORITIZATION
Post-inflection, people look to re-think and re-prioritize for long term quality of life.



EXHAUSTION
People try to counter their distrust & skepticism with those in power by entrusting themselves and how they govern their own lives. But this comes with exhaustion and confusion.

Size of bubbles indicate maturity (mainstream/weak)

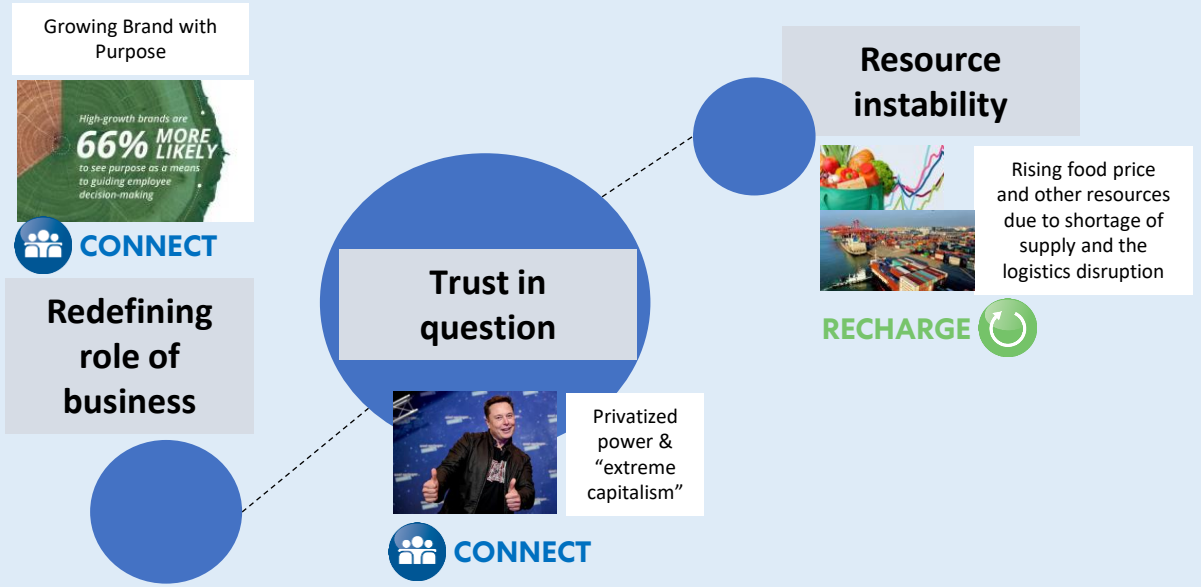
BACK TO DIRECTORY

SO WHAT? UP NEXT: **TRENDS TO ACT ON NOW**

TL;DR DECISION MAKING

TRENDS WE CAN ACT ON NOW.





TREND OPPORTUNITY #1:

A little (brand) help in a time of change

More and more people look to brands to improve their quality of life. In the time of change, what memory structure can we borrow, and distinct associations can be tap into, in helping consumers to easily and quickly make better choices?

TREND OPPORTUNITY #2:

Build brand trust through credible action

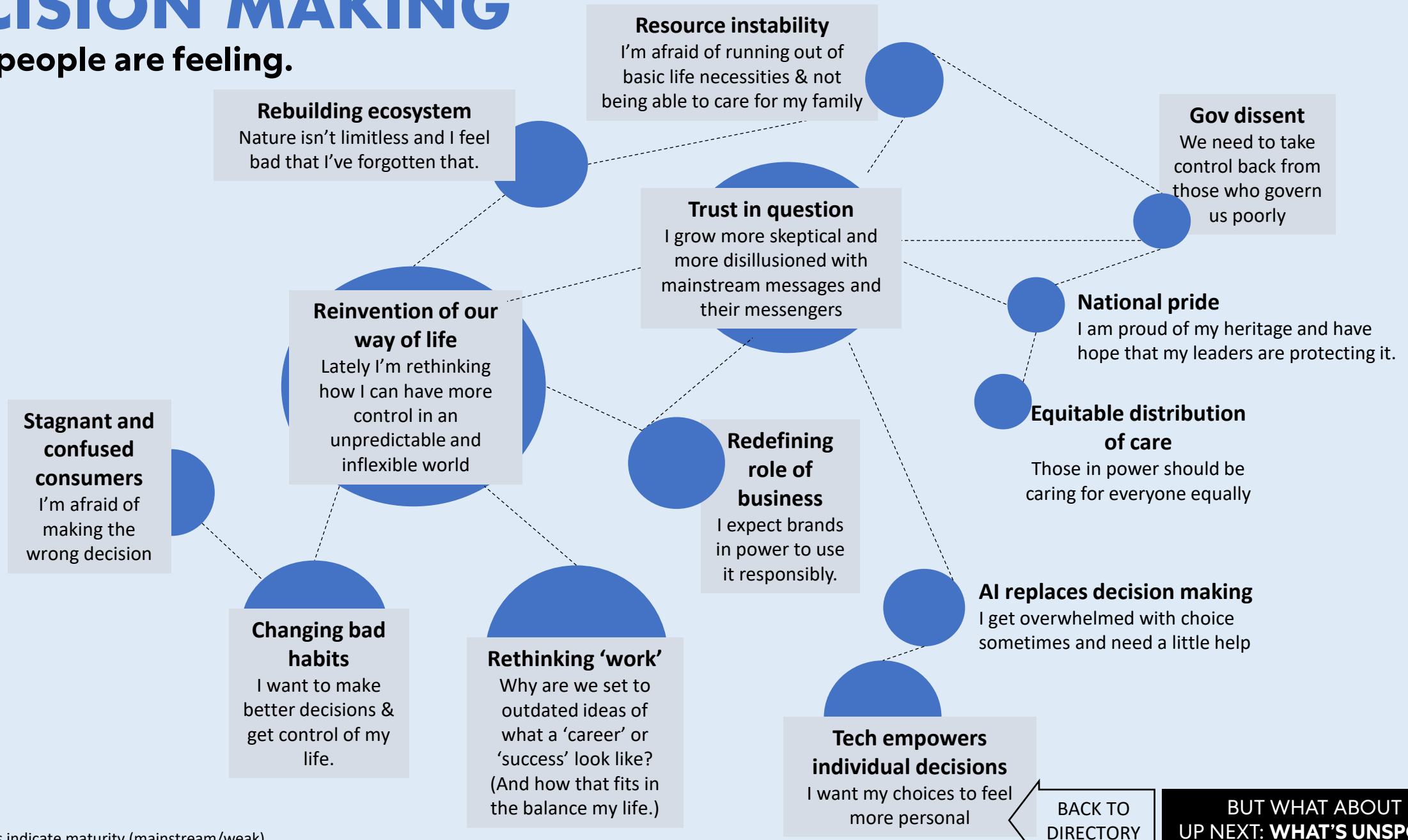
People demand business to do more in solving societal issues, but with credibility and words backed by action. As people face real-world issues around inflation and resource shortages, how can our brands be a trusted aid to provide security and stability to people's core needs?

BACK TO DIRECTORY

TELL ME MORE. UP NEXT: **THOUGHTS AND FEELINGS**

DECISION MAKING

What people are feeling.



Size of bubbles indicate maturity (mainstream/weak)

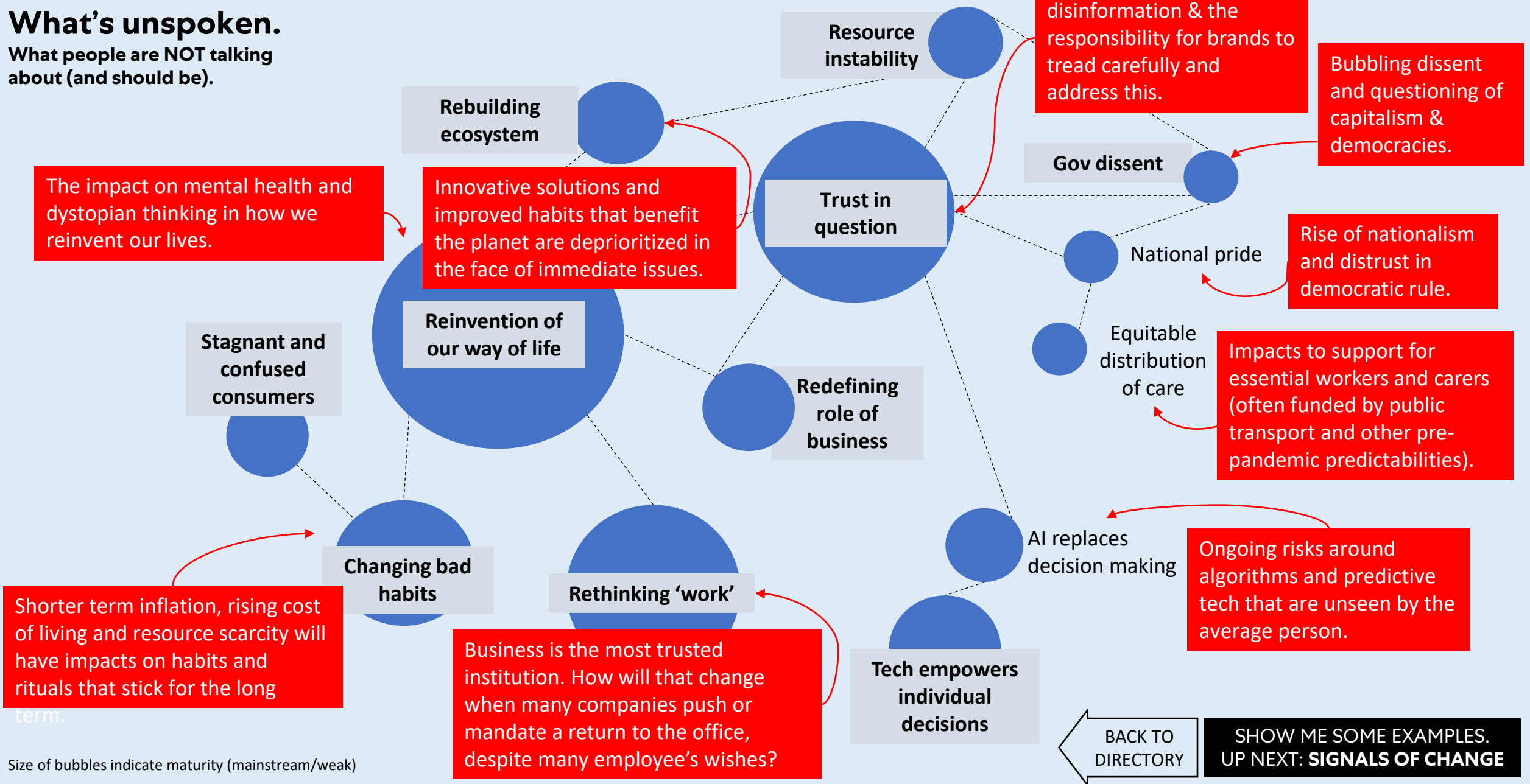
BACK TO DIRECTORY

BUT WHAT ABOUT ...
UP NEXT: **WHAT'S UNSPOKEN?**

DECISION MAKING

What's unspoken.

What people are NOT talking about (and should be).



Size of bubbles indicate maturity (mainstream/weak)

BACK TO DIRECTORY

SHOW ME SOME EXAMPLES. UP NEXT: **SIGNALS OF CHANGE**

DECISION MAKING

Signals of change.

Rising cost of living, inflation

Scarcity-thinking. Preparing for life without an abundance of everything we're used to.

Shortages across industries

The Guardian
Desperation amid food shortages in Shanghai as Covid lockdown bites



Resource instability

Questioning capitalism. authoritarian aggression.

Polarization

Nottingham City rewilding scheme to build community spaces



Gov dissent

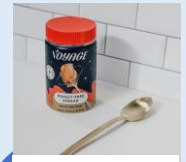
Growing National Pride – more favorable towards Chinese brands/ culture

From just "local" to family owned and operated

Focus on communities

National pride

Shift from biodegradable to nature-based, regenerative materials.



Voyage wastestream food

Rebuilding ecosystem



Personalized Vitamin Subscription – convenient ways to ensure nutrition intake



Little People, Big Dreams books showcase positive world changers

Misinformation

Trust declines for government and media

Trust in question



Privatized power & "extreme capitalism"

Supervision on anti trust and anti monopoly

Reverse globalization

Fatigue from contingency planning.

Information bankruptcy. Trust in data sources is dwindling.

Stagnant and confused consumers

Normalizing "food": "What I Eat in a Day", Anti-diet, Intuitive Eating

Reinvention of our way of life

Unstable business environment due to changing gov policies

Suburban urban communities / shift in CBD to rural

Redefining role of business



Growing Brand with Purpose

Sustained trust in business

Boycotts and sanctions in Ukraine war

"cool to be kind" activism

Equitable distribution of care

Addressing shifting demographics (expansion of middle class, aging population, 3rd child).

Addressing the wage gap (2021 CEO bonus)

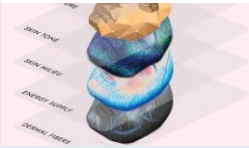
Walt Disney World earmarks 80 acres for affordable housing project



Human-driven decisions will minimize 2024 onwards as we use things like data fabric (integrating data across platforms).

AI replaces decision making

Revea AI skincare tech for curated health plan



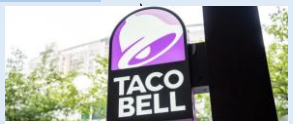


ArtBar Tokyo; growth of self improvement groups

Financial empowerment particularly for young people

Personalized Nutrition: Metabolic Watches, DNA testing, AI powered Home Diagnostics.

Changing bad habits



Taco Bell launches Business School for employees

Rethinking 'work'

Younger consumers are more open to share data for COVID control.

5G and the wide application in daily life.

Choice paralysis

Tech empowers individual decisions

Streamlining health data

Polywork and side hustles

Growth of entrepreneurs 40 year high in the US

The great resignation / demand for flexibility

DAOs

Growing signal

Weak emerging signal

Size of bubbles indicate maturity (mainstream/weak)

BACK TO DIRECTORY

SO WHAT FOR US? UP NEXT: **HEADWINDS & TAILWINDS**

DECISION MAKING

Headwinds & Tailwinds.

headwinds

Trust in question

CONNECT

Media and government trust has bottomed out, whether the distrust comes from the 'enemy' or from the inside. Polarization and division are rampant and likelihood of disinformation is high. How can we play a proactive responsible role?

Resource instability

RECHARGE

While people are reevaluating their daily habits, rituals and routines (reinventing way of life) they are also pulled back down daily by struggles to accessible affordable basics. How might this conflict create habits people don't want but are forced to make?

tailwinds

Role of business

CELEBRATE

The expectations for brands to do more is evident, but so is the higher trust in business and desire for brands to do more, particularly on societal issues that impact individuals and collective communities. Brand action will be viewed critically but has a high opportunity to be rewarded.

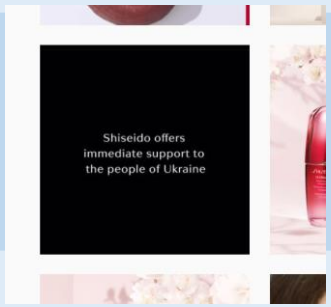
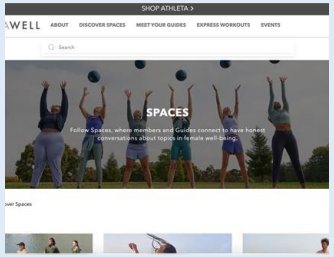
Reinvention & Exhaustion

RECHARGE

As people look to products that can fulfil both a desire to improve their quality of life and offer a short cut through the immediate burnout, convenience and enjoyment will continue play a pivotal role in providing a sense of control and immediate relief.

DECISION MAKING

Spotlight Trend: Role of brands

	US	China
	It's about: empowerment, inclusivity, boldness	It's about: simplicity, ease, education
Innovation	 In an attempt to quell child anxieties, Dove developed a new line of bath and body products emblazoned with self-affirming statements like "I am fantastic, smart and helpful. A QR code on the back of the bottle points caregivers to guides on how to develop confidence in children, as well as an online self-esteem game for kids.	 PepsiCo launches the first "no bottle label" Pepsi in China in April 2022. This is the company's attempt to improve the recycling rate of plastic and reduce carbon footprint.
Media	 Alongside a donation of $1.1m, Japanese make-up company Shiseido has promised to support displaced Ukrainians with job opportunities, internships and scholarships as part of long-term efforts to help refugees.	 In March 2021, L'Oréal introduced its first virtual idol to Chinese consumers. 'Mr. Ou', depicted on the brand's social channels in anime-style, is a 24-year-old, Chinese-French entrepreneur who works within the beauty industry and cares deeply about the environment.
Trade	 In July 2021, American activewear brand Athleta launched online platform AthletaWell. While the site hosts exercise videos, its main focus is on creating a community space centred around wellness guidance across movement, recuperation, mental wellbeing and women's health – offering fans value beyond tangible products.	 Alibaba's 聚划算 launched a "Effective Environmental Protection Plan" 有效环保计划 uses numerical labels to inform consumers the number of times a reusable product purchased through 聚划算 must be used before it becomes "climate positive" to promote mindful consumption.

BACK TO DIRECTORY

WANT TO READ MORE? UP NEXT: SEE OUR **SOURCES**

DECISION MAKING

top 15 sources

- Edelman: Trust Barometer 2022.
- Korn Ferry: The Future of Work
- EY: Geostrategic Outlook.
- Dentsu: Consumer Vision - Bigger Bolder Brands.
- Deloitte: China Mobile Consumers Survey.
- Coefficient: The new consumer.
- Mintel: In Control, Ethics in Check and Flexible Spaces reports.
- Trend Micro: Security Predictions
- Kantar: The Imperative of Imagination
- Deutsche Bank: 10 Themes for 2022.
- Stylus: Climate Crisis spotlight
- IPCC Sixth Assessment report
- Euromonitor: “Adaptable Models”.
- Gartner: “Human-Driven Decisions”.
- Fjord: “Information Bankruptcy”.

read more



Edelman Trust Barometer



Korn Ferry Future of Work



EY Geostrategic outlook

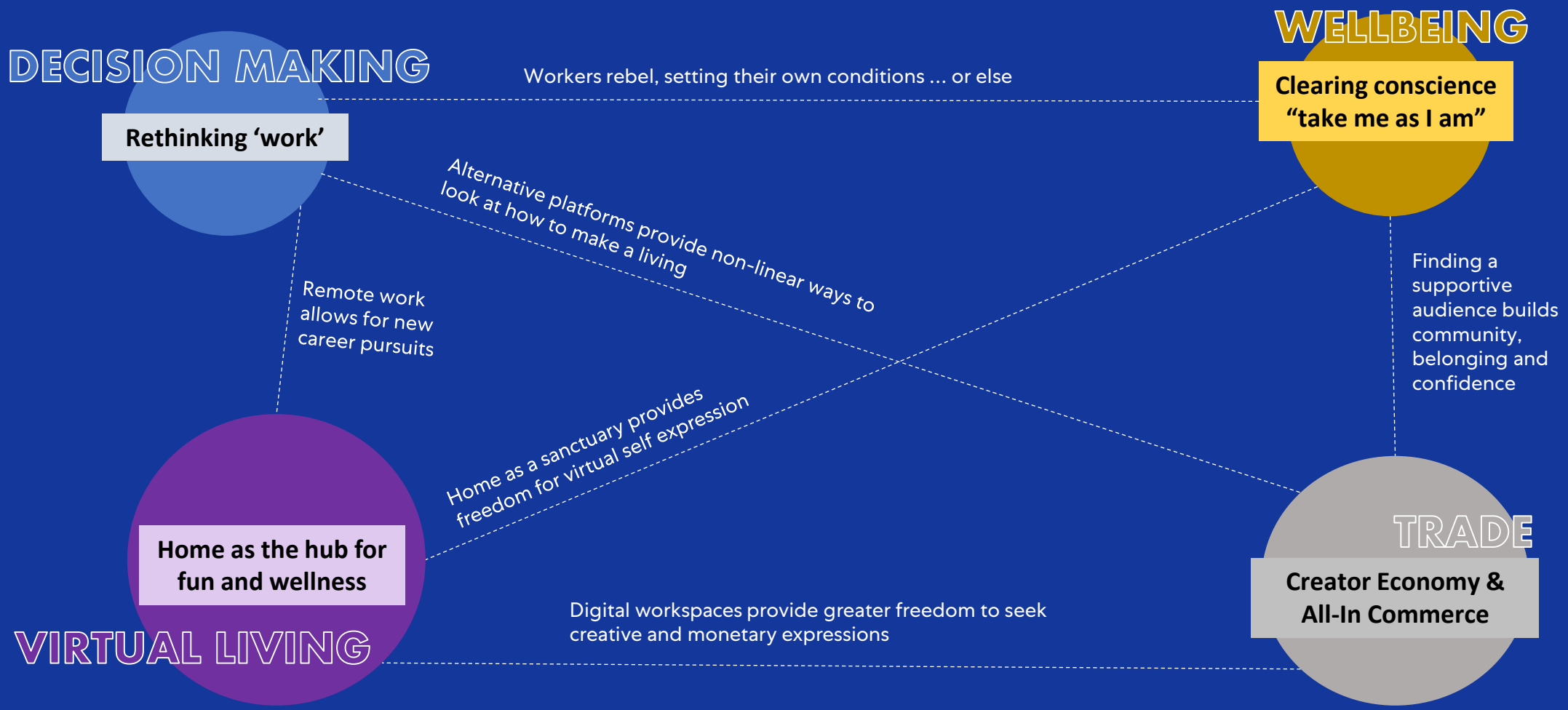
BACK TO THE START

UP NEXT:
FINAL GUIDANCE

All sourced material was published in preparation for, or in, 2022.
Sources in quotes refers to articles within a larger report. Learn more on Foresight Knowledge Zone.

Don’t forget

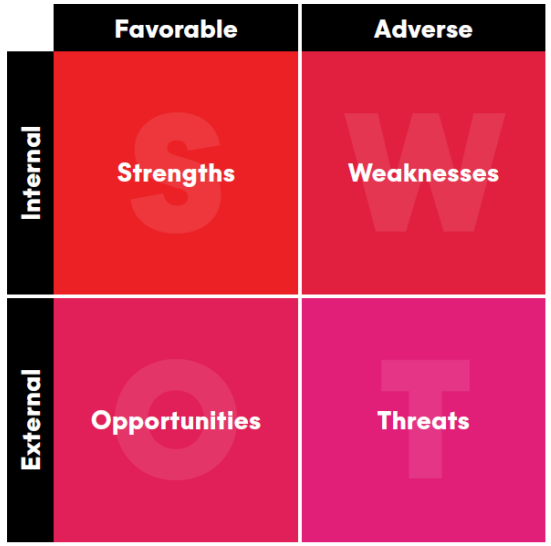
These Trends are connected to one another …



What you can do next

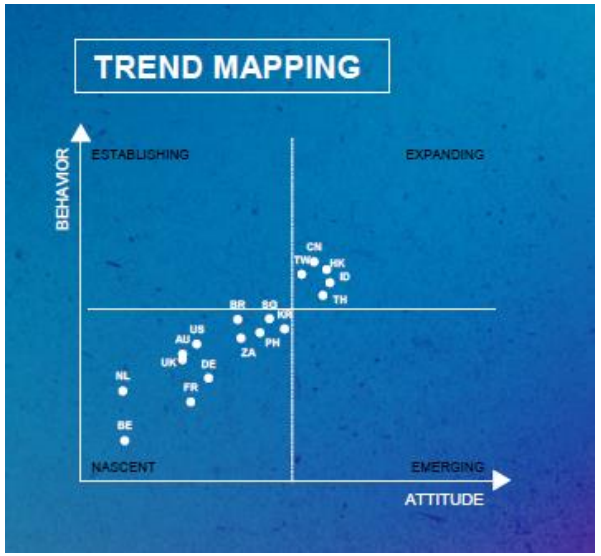
Three key foresight prioritization tools you can utilize to make choices for your segment or brand

SWOT



Familiar frame work may help you understand how certain trends or themes may disrupt, internally or externally

Prioritization map



Helpful in understand which trends are most relevant for you to act on now vs observe. The X & Y axes can be tailored.

Future Stakeholders

FUTURES STAKEHOLDERS	Familiar	Adjacent	Theoretical
Your organizations	the usual suspects	those who are one or two steps removed, but who intersect with your company's future	those who are not directly connected to your company now but could be later
Partners			
Customers			

Who will be the future winners and losers? Identify how trends may play out for you, your retailer partners and your competitors.

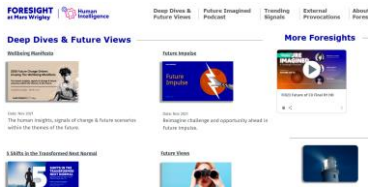
Still curious?

These are some of our favorite holistic trend reports.

Exploring with us



Read more on the Foresight Knowledge Zone





Fjord & **Accenture** Trends 2022



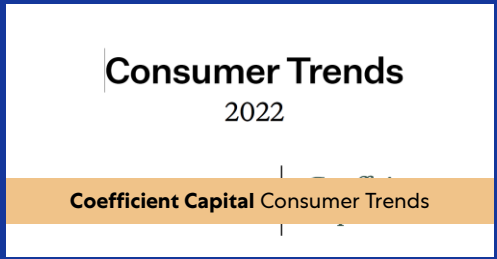
Most Contagious Report 2021



Euromonitor Top 10 Global Consumer Trends



Wunderman Thompson Future 100



Coefficient Capital Consumer Trends



Foresight Factory Trending 2022



Forrester Predictions 2022



IBM 5 trends for 2022



Insites Consulting Consumer Trends Report



Stylus Look Ahead 2022

STYLUS



TrendWatching Trend Report 2022



SOON Futures 2024 Forecast

Stay curious!

Get in touch with your foresight team.



Joanna Lepore
Associate Director
Foresight North America



Lianne Kwan
Associate Director
Foresight China



Sandeep Das
Associate Director
Foresight GEM



Jessica Southard
Director Foresight
Mars Horizon

MARS WRIGLEY | Human Intelligence



When you're curious, you find lots of interesting things to do. But one thing it takes to accomplish something is courage.

Walt Disney

Let's act today on the foresight of the future.

MARS WRIGLEY | Human Intelligence