

The Future

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A REPORT BY WUNDERMAN THOMPSON INTELLIGENCE

Introduction

Welcome to "The Future 100," our annual report forecasting what's in store for 2020 in 100 snackable trends.

The turn of this new decade is proving a key marker for positive change as consumers and companies are desperate to look beyond the latter part of the 2010s, which was filled with political, economic and environmental instability. People are now banding together, resulting in increased global action and the untabooing of social norms. The reign of Big Tech is coming to an end and irresponsible companies and figureheads are being held accountable for wider social and environmental issues.

What's in store for 2020? Ethically motivated consumers have created a new value system for brands, one that protects consumers, preserves culture and provides hope (see optimistic futures, p6). They are also inspiring improvements to existing environmental promises, as leading brands go beyond carbon-neutral initiatives and announce climate-positive plans.

Wellbeing and sustainability now go hand in hand, with consumers caring as much about the health of the planet as about their own health. In food and drink, recipes are being cooked up to futureproof our entire ecosystem, while in hospitality, hotels are cementing WELL standards into their environments.

Companies are also noting the positive health implications of human connectivity, addressing the continuing population and lifespan rises with products and services to build meaningful connections. Loneliness is being tackled as a social and public health issue, new neighborhoods in megacities are being envisioned to foster social wellbeing, and even social media is starting to promote meaningful rather than multiple connections.

Data is under the microscope and this is affecting all industries, with the trustworthiness of a brand now tied to the way it uses consumer data and how transparent its terms and conditions are. Rules and regulations are slowly being implemented to protect consumers, and brands are racing to ensure they are using personal data responsibly (see the privacy era, p45).

Consumers have laid the foundations for change and now forward-thinking brands are working towards building an optimistic and reassuring future for all.



Emma Chiu
Global Director, Wunderman Thompson Intelligence
JWTIntelligence.com



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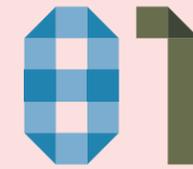
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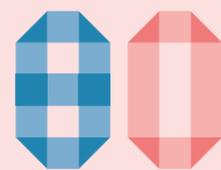
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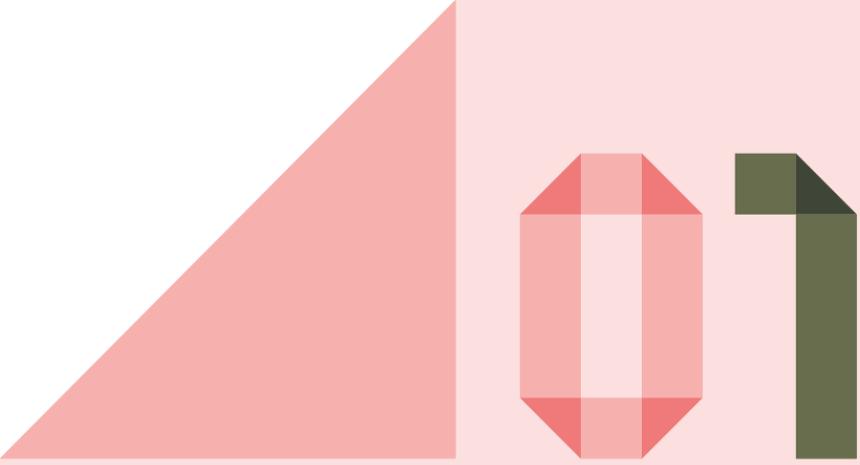
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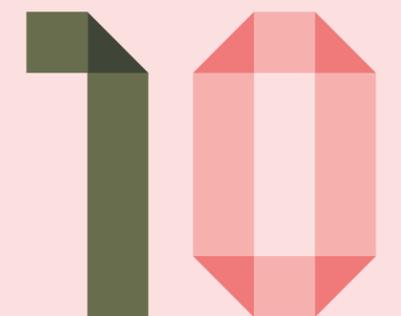
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Culture





Optimistic futures

Brands are adopting an optimistic outlook for 2020 and beyond.

The past years have left societies across the world adrift in unsettling political, economic and environmental times. Consumers have been feeling more anxious than ever, with Americans among the most stressed in the world, according to a 2018 survey by Gallup. Now brands and consumers, eager to move the conversation on from bleak, dystopic times, are casting a more measured and reassuring lens on the future.

“While many refer to these times as the age of anxiety, I’ve begun to feel cautiously optimistic,” Brenda Milis, creative trends lead at Adobe, tells Wunderman Thompson Intelligence. “A scaling number of creative projects and campaigns now focus on presenting honest emotions, expressiveness and connection. These are the kinds of visuals that have the power to build trust, community and help inspire thoughtful change in the world.”

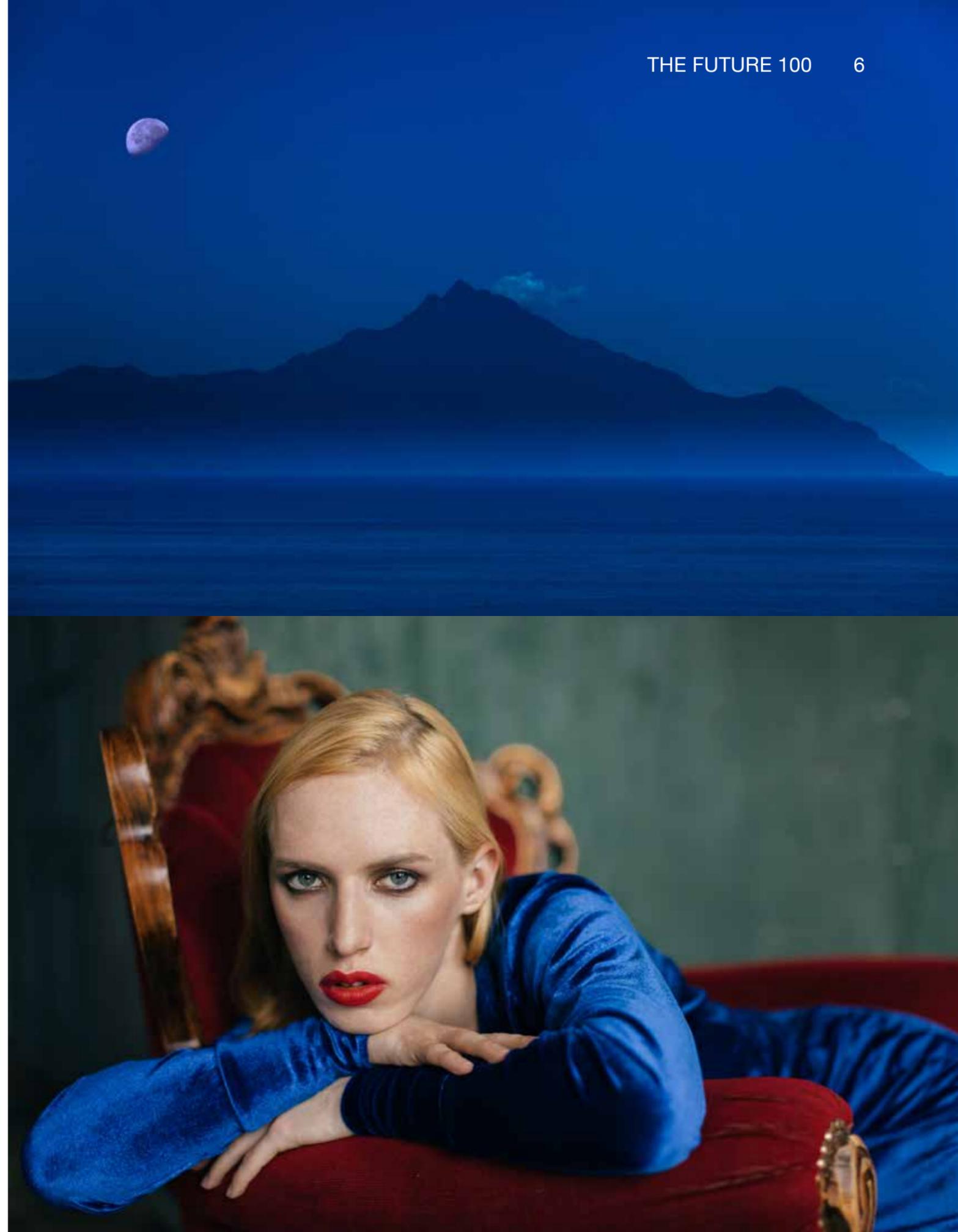
Lego launched a playful campaign in September 2019 with a provocative mission, asking the next generation to take on the challenge to “Rebuild the World.” Prada’s spring/summer 2020 men’s collection, Optimist Rhythm,

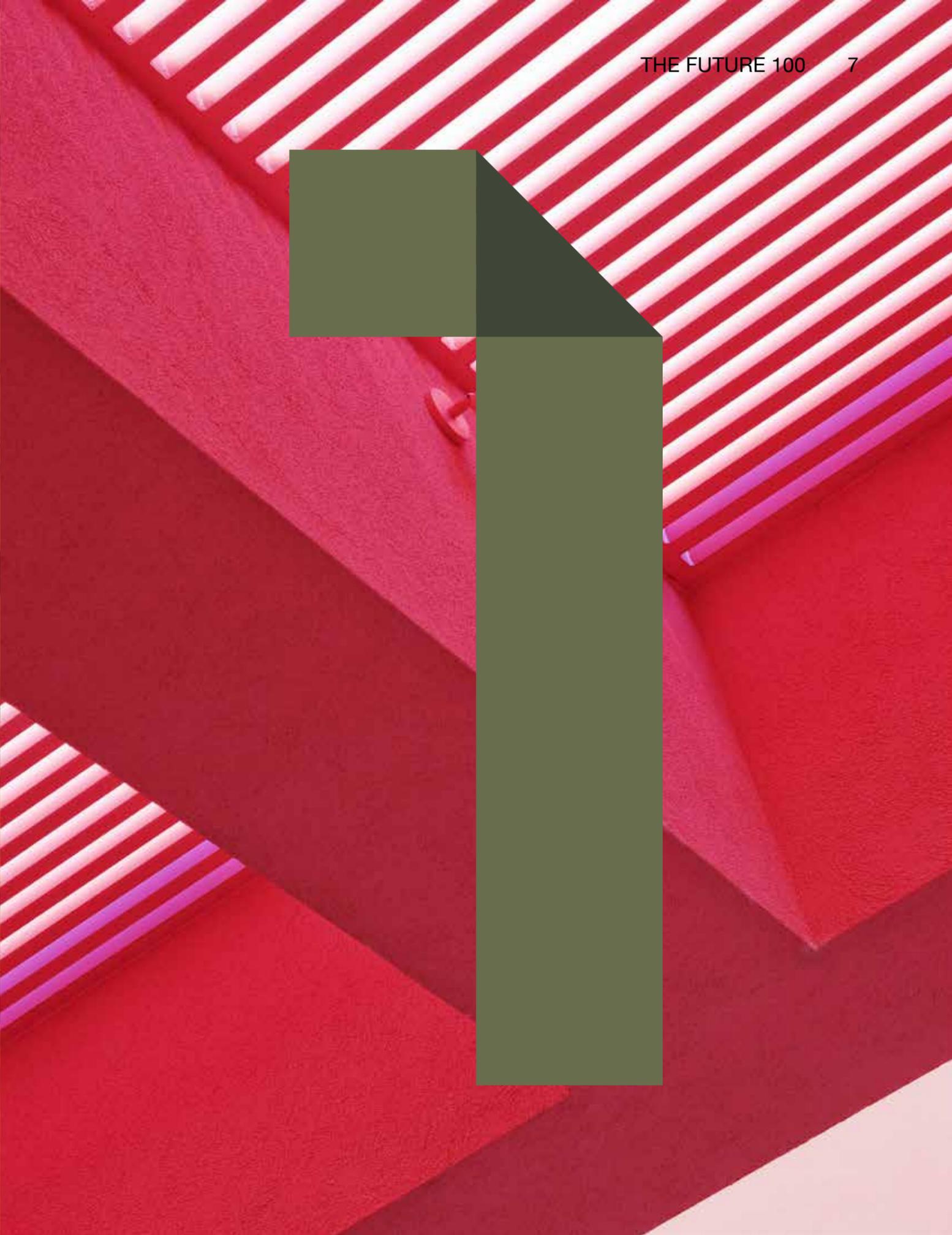
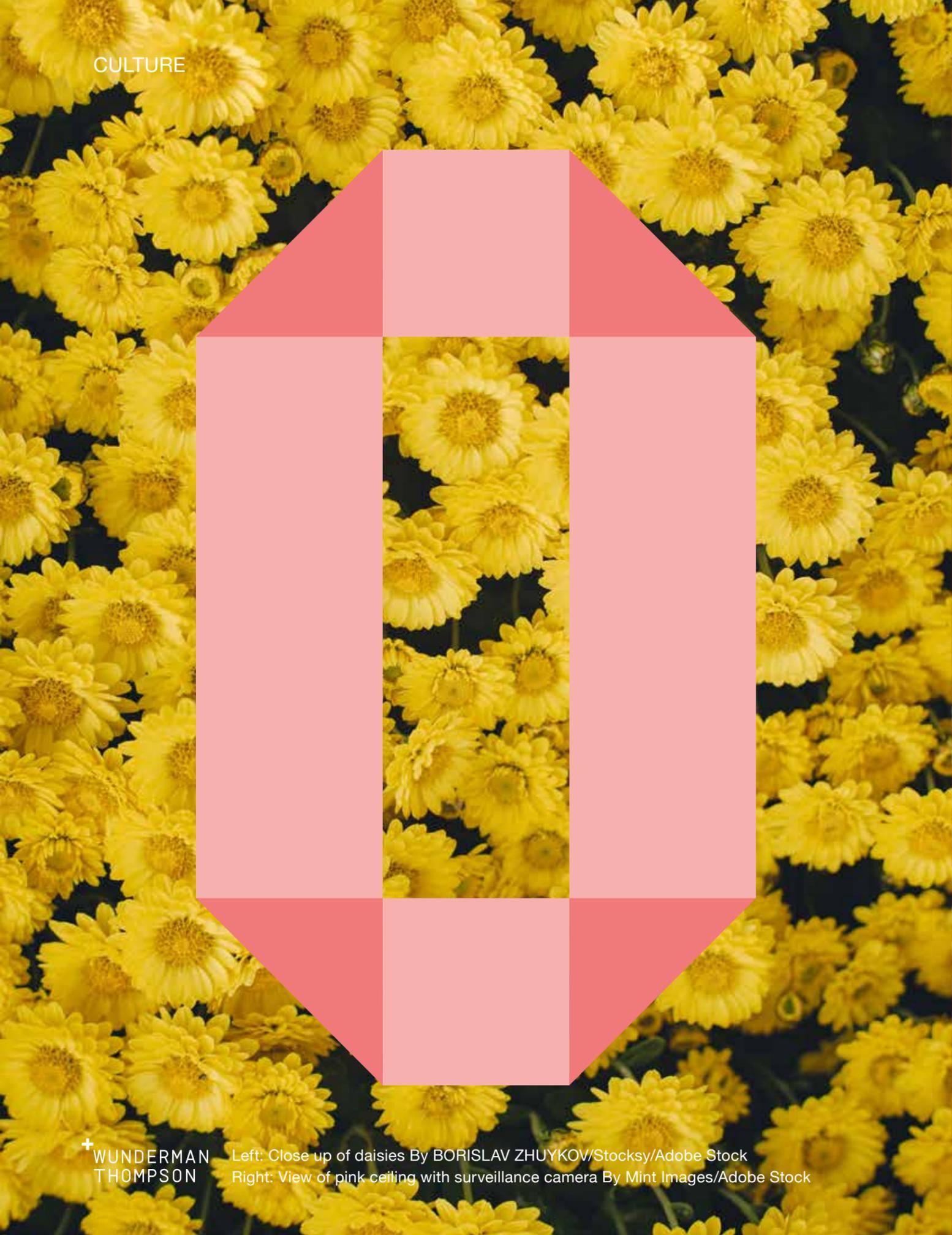
Top: Scenic view of Aegean Sea with Athos Mountain

By Gencho Petkov/Stocksy/Adobe Stock

Bottom: Portrait of androgynous young man in blue velvet dress

By Alexey Kuzma/Stocksy/Adobe Stock





captures a “spirit of confidence, of enjoyment, of boundless positivity and possibility.” Brands are creatively casting a hopeful future for consumers by addressing change for good with hopeful messaging and energizing visual language.

The Pantone Color Institute has also unveiled a positive forecast in its color palette for spring/summer 2020, leading with the confident and fierce Flame Scarlet red swatch. The overall palette is bright and warm, with colors that are bold but grounded and is described as “a story of colorful expression” by Leatrice Eiseman, the institute’s executive director. “Strong and vibrant, this



season’s color palette displays our determined desire for positivity and uplift,” says Eiseman. The announcement of Classic Blue as Pantone’s Color of the Year 2020 perfectly captures a sense of thoughtful optimism. Pantone describes the color as “evocative of the vast and infinite evening sky,” opening up a world of possibilities.

Why it’s interesting:

The nihilistic days are over and forward-thinking companies are brightening the gloom by offering a measured and thoughtful outlook, one that is both realistic and optimistic.





Female sporting revolution

Rising interest in professional female athletes is changing the game for women in sports—they are becoming global influencers, role models for the next generation, and prompting a shift in representation.

Female athletes have had a record-breaking year, drawing unprecedented global media attention. American sprinter Allyson Felix broke Usain Bolt's record for the most gold medals won at the track and field World Championships in September 2019. Kenya's Brigid Kosgei set a new world record at the Chicago Marathon in October 2019, and in the same month, at the Artistic Gymnastics World Championships in Stuttgart, Simone Biles performed two new moves that have subsequently been named after her.

Women's sporting competitions are commanding bigger audiences, and with that, bigger sponsorship deals, as brands hurry to sign up top sportswomen. Visa announced a roster of athlete sponsorships at the 2020 Olympic and Paralympic Games in Tokyo, with leading female names including Biles, soccer





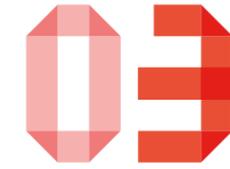
star Megan Rapinoe and swimmer Katie Ledecky on the list. Barclays is investing £10 million in the Women’s Super League in the UK as part of a three-year sponsorship that the Football Association has called “the biggest ever investment in UK women’s sport by a brand.” And Adidas has launched an initiative to “break down barriers faced by women and girls in sport,” kicking off a series of short *She Breaks Barriers* films.

As women’s sport moves into the limelight, high-profile instances of gender bias in pay and treatment are coming into the public eye. In March 2019, the women’s national US soccer team sued the United States Soccer Federation for “purposeful gender discrimination” in pay. Nike also came under the spotlight when runner Mary Cain detailed the toxic culture she endured at Nike Oregon Project, where she was body shamed. The company’s “Dream Crazier” campaign showed the grit and strength of women, but actions within the company did not align with the ad. Female athletes also called out the brand for cutting their pay during pregnancy, and female employees have filed a lawsuit against it for violating equal pay laws.

Beyond excelling at their profession, female athletes represent a bigger shift not only in sports, but also in attitudes to gender equality and female strength, and set an admirable example.

Why it’s interesting:

Women in sports are creating a new paradigm for female strength. Physicality, passion, agency, sweat and grit are the new hallmarks of femininity. But credibility in this space means 360-degree behavior and transparency. Like every brand or company that seeks to champion its female-friendly ethos, brands seeking to tap into the women’s sports revolution need to think carefully about their practices on every level.



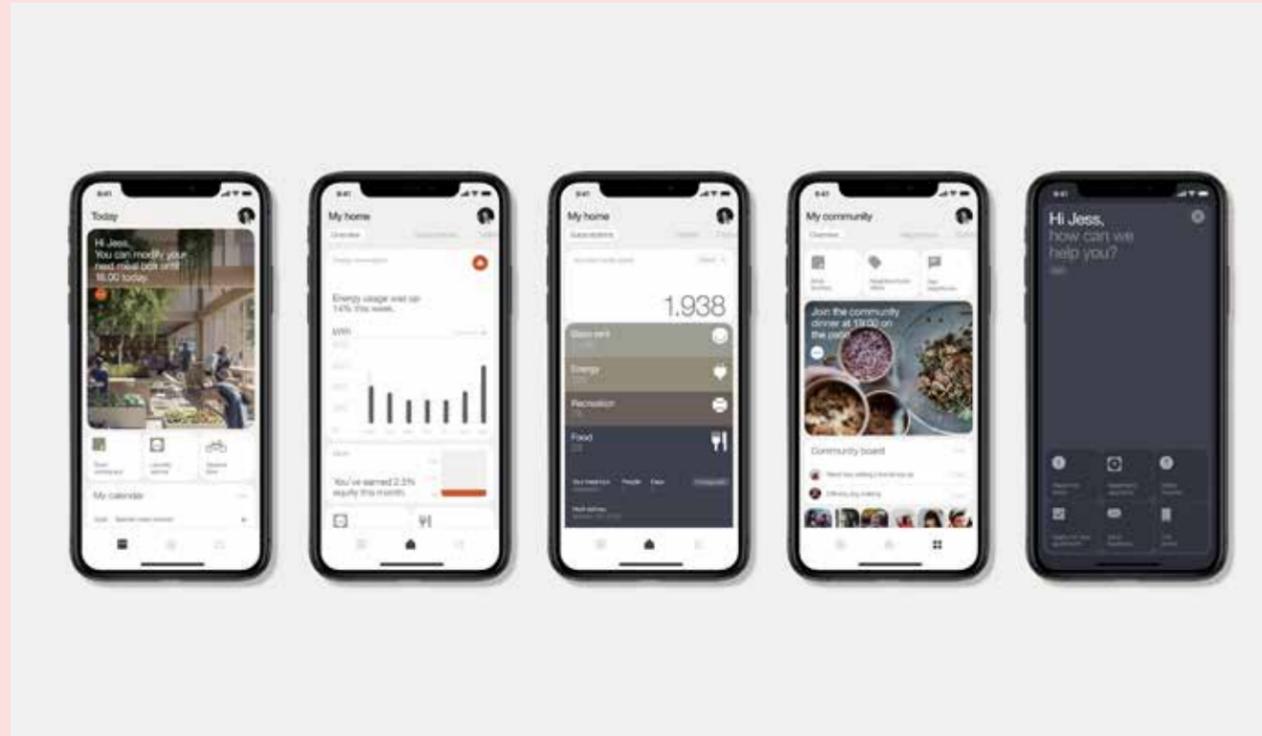
The new neighborhood

Emerging social enterprises are reinventing conventional living models, creating new community structures built around core pillars of digital infrastructure, regenerative resources and social wellbeing.

In the next evolution of coliving, residents share more than just a dwelling. The newest urban living concepts turn the metropolitan community of the future into self-sufficient energy syndicates, communal ownership cooperatives, cross-generational social hubs and farming collectives.

In June 2019, Ikea's Space10 introduced "a new way of living together" with its Urban Village Project. The project rethinks how the home of the future will be designed, financed and shared. The concept is designed for life-long, cross-generational living, with shared facilities and services such as communal dinners, joint daycare, urban gardening, public fitness facilities and shared transportation. For self-sufficient sustainability, the community will be responsible for its own water harvesting, clean energy generation and local food production.





The project also establishes a new financial model for homeownership. A unique legal framework would allow residents to access ownership progressively by offering the option to buy shares of the property each month or sell shares back to the cooperative. Eventually, the property would be fully owned by members of the community, creating a radically new form of democratic housing cooperative.

A mobile app serves as the connective tissue of the community, creating a space where residents can make rent payments, monitor equity investments, schedule laundry services, reserve a bike or car, book a workspace, manage food delivery subscriptions, track energy usage, sign up for community dinners and chat with neighbors.

This follows Space10's March 2019 SolarVille prototype of a neighborhood powered by solar energy. The community would share the energy through





We can create new realities that promote a sense of wellbeing and turn the spaces we inhabit into healthier and happier places, all while being more affordable and efficient for those that live there.

Jamiee Williams, architectural lead, Space10

a microgrid. The neighbor-to-neighbor trading scheme enlists blockchain technology and solar panels, creating a circular clean energy system that would allow residents to make and share their own affordable, renewable energy.

In August 2019, TC Plus unveiled G-Lab, a house design that blurs the line between private residence and community hub. It is both a family home and a space that can be shared by the neighborhood. In place of a traditional front door, the home's entry is marked by an eight-meter-wide curtain that can be drawn for privacy. Inside the house, spaces range from public to private, with movable dividers and beds behind folding wooden panels.

Why it's interesting:

Urban dwellers are ready for a new style of living that is kinder to residents and the planet alike. "It is clear that unless we rethink our built environment, our cities will become increasingly unsustainable, unaffordable and socially unequal," comments Jamiee Williams, architectural lead at Space10. These projects start the conversation of future coliving and of how, as Williams says, "we can create new realities that promote a sense of wellbeing and turn the spaces we inhabit into healthier and happier places, all while being more affordable and efficient for those that live there."



04

Data creatives

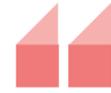
A new class of AI artists is leading a modern creative renaissance.

New artistic projects are inviting machines to be part of a creative dialogue that recasts data as the raw creative material of the future. By endowing technology with creative agency, these creatives are throwing into relief what it means to be human in the digital age.

In November 2019, Jean-Michel Jarre—a musician who has been dubbed the godfather of electronic music—unveiled an “infinite album.” The project, called *Eon*, uses seven hours of Jarre’s music to create an evolving, dynamic musical experience during which no two listening experiences will be the same. The result is a “never ending, never repetitive, organic art-piece that will live and grow forever in everyone’s own singular space-time continuum,” Jarre explains on his website.

“The emergence of AI is a revolution,” he told the BBC. “For the first time, we’re combining the creative process itself with a machine. In 10 or 15 years, robots will have a sense of nostalgia and will be able to cry. I think that’s quite cool, quite exciting. It will mean a new approach to the creative process entirely.”





What makes data so exciting for me is that it's not just data, it's kind of a memory. It's a memory for a moment in life.

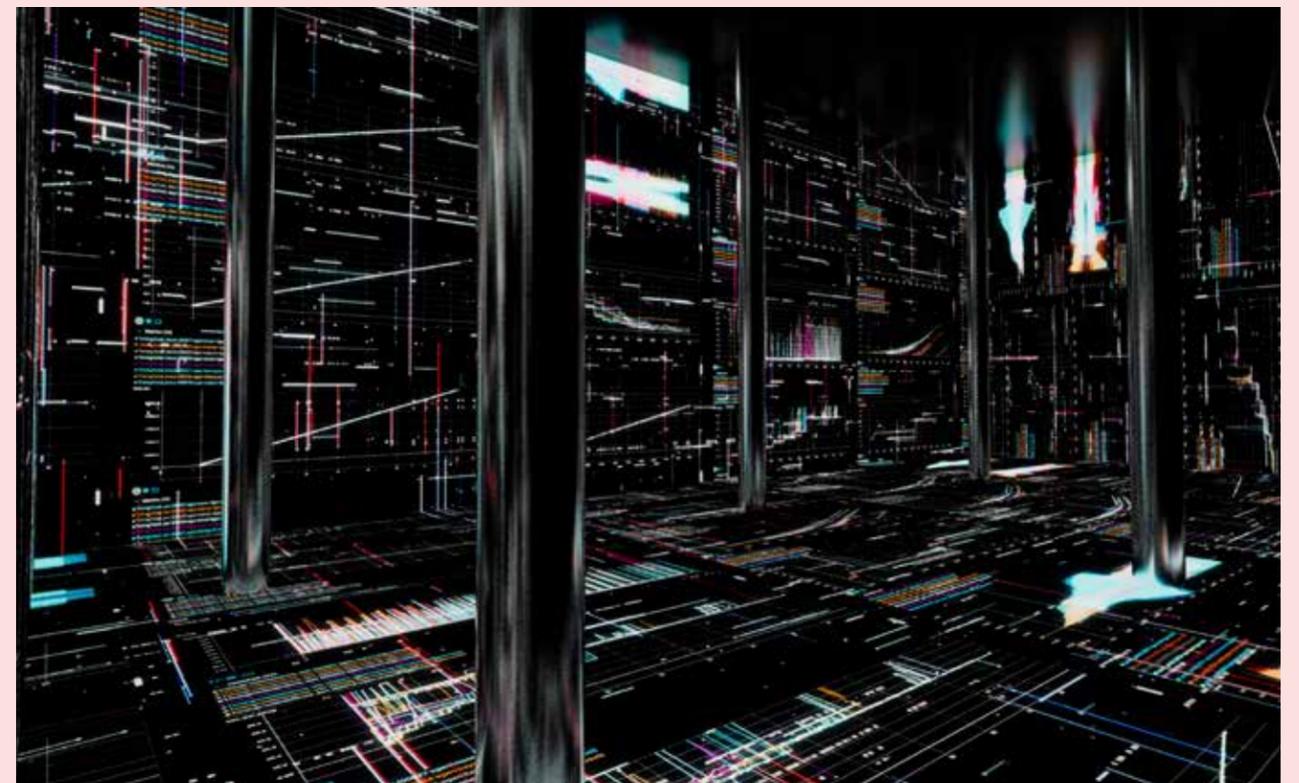
Refik Anadol, artist

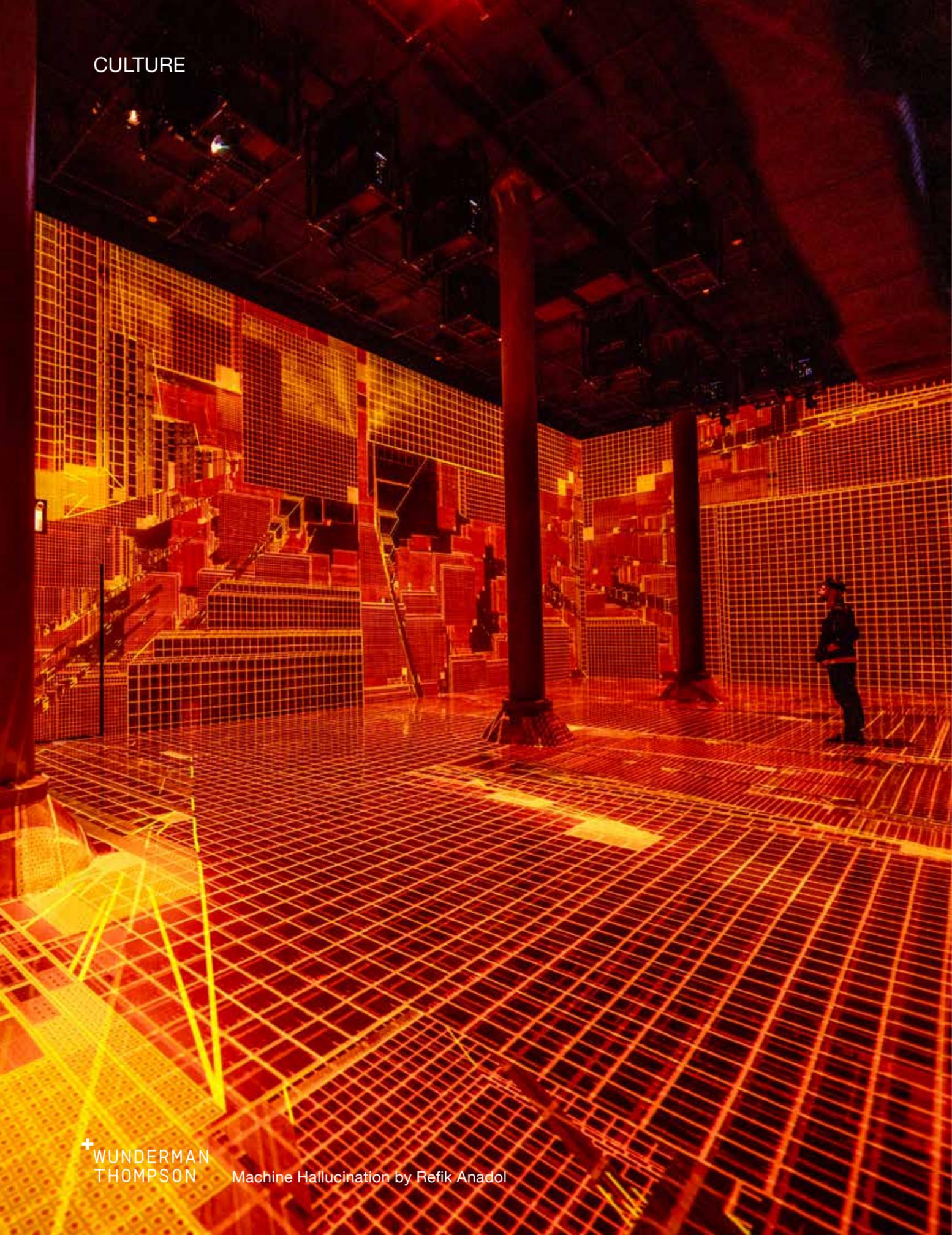


Refik Anadol is another artist fascinated by machines' emotional and psychological faculties. His projects visualize the memories and dreams of machines, exploring the definition of consciousness at a time when machines hold so much of our shared cultural memories. "What makes data so exciting for me is that it's not just data, it's kind of a memory. It's a memory for a moment in life," Anadol tells Wunderman Thompson Intelligence.

His most recent project, Machine Hallucinations, explores New York through the mind of a machine. The project opened in September 2019 as the inaugural installation at Artechouse New York, a new gallery dedicated to digital art in Manhattan's Chelsea Market. To create the exhibit, Anadol mined hundreds of millions of images of New York City's iconic architecture and urban landscapes, then deployed machine learning, artificial intelligence (AI) and bespoke algorithms trained on the images to "visualize a consciousness of New York" from a machine's perspective.

The images are projected onto the walls, ceiling and floor for an immersive viewing experience. Anadol calls this format "latent cinema," which he





By giving tech and machines creative freedom, artists are fueling a new era of AI creativity into one that is more than human.

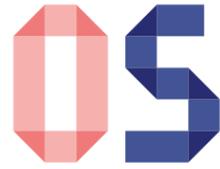
describes as “a new way of exploring narrative conceived from the mind of a machine, one that has the ability to create its own reality.”

In *Melting Memories*, he integrated AI with output from an electroencephalogram that measures brain wave activity, to create “ethereal abstract data sculptures visualizing the moment of remembering,” he tells Wunderman Thompson Intelligence.

The Barbican in London is also exploring the concepts of humanity and creativity in a digitally steeped world. The arts center’s 2019 exhibition *AI: More than Human* questioned “what it means to be human in a time when technology is changing everything.”

Why it’s interesting:

By giving tech and machines creative freedom, artists are fueling a new era of AI creativity into one that is more than human.



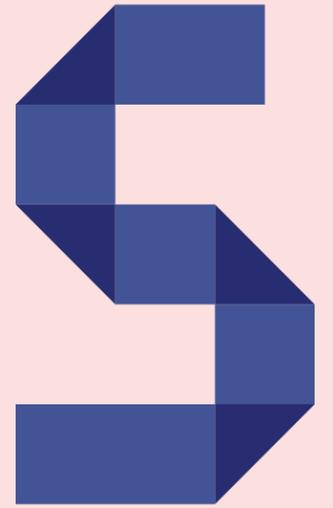
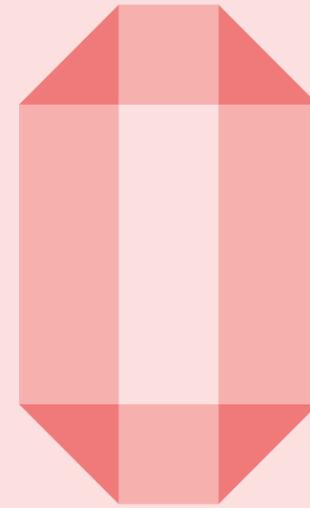
Reframing time

The age of non-linear sequencing is upon us, as people increasingly opt for a flexible and open approach to how they engage with narratives and entertainment.

The popularity of streaming content has shifted the way consumers engage with entertainment, fueling freeform viewing habits not restricted to a predefined timetable or sequential path. According to Nielsen, 56% of US adults stream non-linear content to their televisions, while research by Hulu shows there are twice as many non-linear TV views among consumers under the age of 35. The flexibility of non-linear TV allows people to approach time in a personalized fashion—viewing when it suits them, rather than according to a network’s schedule.

Perhaps as a result of this, the cultural perception of time is shifting towards the unpredictable. This may be why the Metropolitan Museum of Art Costume Institute decided to focus on this broad subject matter for its spring 2020 exhibition. However, the press announcement in November 2019 posed problems for a number of publications, as journalists attempted to explain the theme. *Vogue’s* headline ran “24 hours later, the internet is still working out this year’s Met Gala theme.” “The Met Gala 2020 theme is confusing a lot of people,” wrote *Marie Claire*.





What exactly does the Met's About Time: Fashion and Duration theme mean? According to the official release, the theme is inspired by Virginia Woolf's time-oriented novels and French philosopher Henri Bergson's concept of *la durée*, "time that flows, accumulates and is indivisible." Yes, a bit of a head-scratcher. But perhaps not, as, for consumers rooted in an age of non-linear formats and speed-controlled consumption (see speed-control entertainment, p42), the way time is distributed is no longer constrained by the clock and is instead a far more liberating concept.

The show will open to the public in May 2020 and will take a "nuanced and open-ended" approach to time, according to Andrew Bolton, Wendy Yu Curator in Charge of the Costume Institute at the Met. "It's a reimagining of fashion history that's fragmented, discontinuous, and heterogeneous," he told *Vogue*.

Why it's interesting:

The way time is being broached is evolving, as consumers increasingly adopt on-demand habits and distribute their time more freely. For innovative brands up to the challenge, there's space to help redefine the quotidian and restructure modern life for the 2020 consumer.

06

Next-gen superheroes

The entertainment industry is evolving the definition of "superhuman."

A superhero, according to the Merriam-Webster dictionary, is "a fictional hero having extraordinary or superhuman powers" or "an exceptionally skillful or successful person." Superheroes symbolize cultural exemplars in strength, bravery and altruism, and are often looked up to as role models by fans. With an introduction of LGBTQ superhero characters, the next generation is presenting a broader picture of what it means to be heroic.

LGBTQ representation in television has hit an all-time high. As of November 2019, the percentage of returning LGBTQ characters on broadcast cable networks had reached 10.2%, up from 8.8% in 2018, according to media monitor GLAAD. Showtime's *Billions* and Netflix's *13 Reasons Why* cast nonbinary actors, while NBC's *Good Girls*, Netflix's *Chilling Adventures of Sabrina* and ABC's *Grey's Anatomy* all feature transmasculine characters played by trans actors.



Notably, a number of these characters are action and superheroes—shedding outdated gender tropes and redefining superhuman strength. In July 2019, it was confirmed that Valkyrie will become the first LGBTQ superhero of the Marvel Cinematic Universe franchise when *Thor: Love and Thunder* hits theaters in November 2021. “Our entire success is based on people that are incredibly different,” Marvel’s production chief Victoria Alonso told *Variety*. “If we don’t put pedal to the metal on the diversity and the inclusivity, we will not have continued success. Our determination is to have that for all of the people out there watching our movies.”

The CW television network represents a vanguard of nonbinary and LGBTQ superheroes. In October 2019, Batwoman, portrayed by gender-fluid actor Ruby Rose, became the first gay superhero in a TV series. And when the new season of *Supergirl* aired in January 2019, it included Dreamer, the first transgender action hero in an American television series, played by transgender activist

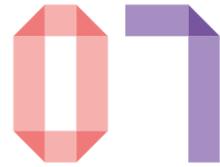


Nicole Maines. This follows the network’s *Arrow*, which features several openly gay and bisexual superheroes like vigilante Mr Terrific, White Canary, and assassin Nyssa al Ghul.

Why it’s interesting:

With generation Z and millennial consumers eschewing outdated and sexist bias in everything from dress codes to dialogue, restrictive superhero archetypes are being re-examined. The next generation of cultural heroes reflects a broader perspective on what it means to be human, rejecting the unfounded notion that the ideal human is informed by gender identity or sexual orientation.





Untabooing in the East

Slowly but surely, some long-established taboos are falling away in Asia.

Attitudes to mental health, sexual health and gender are catching up with the region's rapid economic development, helped along by technology.

In Thailand, a mental health tech startup called Ooca offers video sessions with therapists through a website and a smartphone app. Users can select what's troubling them—whether it's work stress or relationship blues—and check out doctor bios before making an appointment. In pursuit of happier workers and better productivity, large employers are signing on, marking a shift in societal attitudes. Part of the appeal is that the app's software can analyze anonymized data and spot budding problems, such as overwork or other stress.

"It's like a silent heat map within the company," Ooca founder Kanpassorn "Eix" Suriyasangpetch, who has personal experience with depression, tells Wunderman Thompson Intelligence.

Sexual health is also starting to be taken seriously as an important part of general health. In China, a platform called Yummy provides an environment



where women are free to discuss sexual matters, from intimacy to orgasm, and health issues such as breast cancer prevention, in a country where most online sexual health resources are directed at men. User numbers have reportedly topped two million.

Discussions around gender discrimination are also coming to the fore. In Japan, a bastion of tradition, the #KuToo movement campaigns against gender inequality—its name nods to the #MeToo movement in the West. It was founded by freelance writer and actor Yumi Ishikawa after she was forced to wear high heels for her job at a funeral parlor.

Ishikawa combined the Japanese word for shoe, kutsu, with the word for agony, kutsuu, to coin #KuToo and denounced Japan's high-heel requirement for women as a form of gender discrimination that results in real harm—bunions, blistering and bleeding. An online petition she started in 2019 urged the government to make it illegal for employers to force workers to wear high heels. It has garnered more than 31,000 signatures but hasn't managed to change the law yet. In October 2019, Ishikawa appeared on the BBC list of 100 inspiring and influential women from around the world. She has also launched her own brand of flat shoes called KuToo Follower, styled like men's lace-ups, in smaller sizes for women.

Japanese women are also chafing against prescribed hairstyles at work. In 2018, shampoo brand Pantene built a campaign around deconstructing the neat ponytail female Japanese job seekers are expected to sport, encouraging women to let down their hair. The “More Freedom in Job-Hunting Hair” campaign was followed in 2019 by Pantene's “Hair We Go: My Hair Moves Me Forward” campaign, aimed at both job seekers and HR professionals and urging an end to forced conformity.

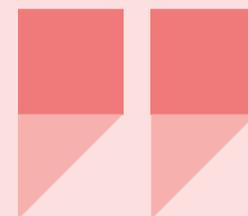


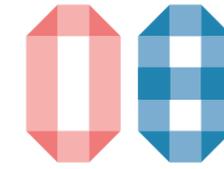
Why it's interesting:

Asian survey data and anecdotal evidence show a shift in openness about traditional taboos and gender straitjackets. Mental health is a big concern across all generations, according to a survey of 2,500 consumers in five countries (China, Japan, Indonesia, Thailand and Australia) by Wunderman Thompson Intelligence. Of the survey respondents, 38% associate sexual health with overall health, with men more likely to say this than women. A new generation is entering the workforce, with new expectations. In a nine-country survey of 4,500 consumers for Wunderman Thompson Intelligence's “Generation Z Asia” report, eight out of 10 respondents say gender doesn't define a person as much as it used to. These changes are coming from the ground up.



Attitudes to mental health, sexual health and gender are catching up with Asia's rapid economic development, helped along by technology.



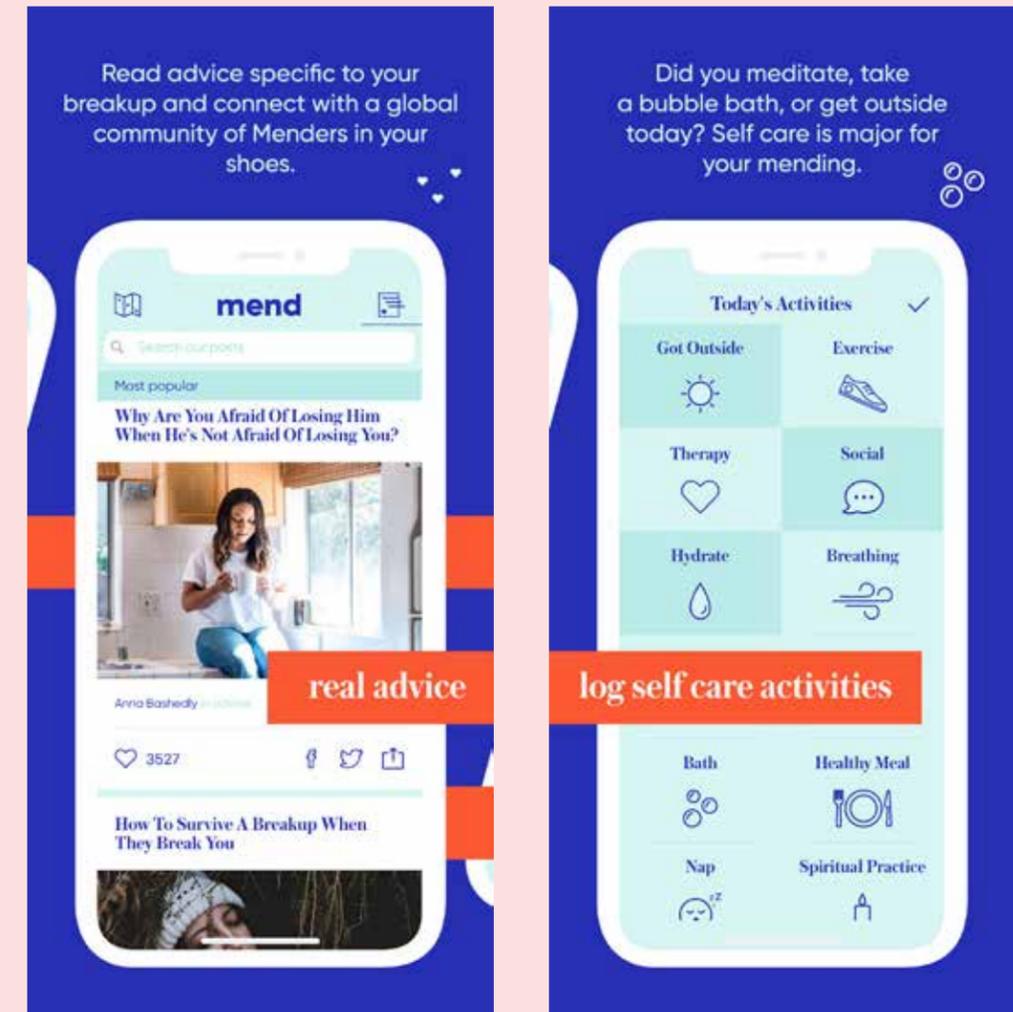
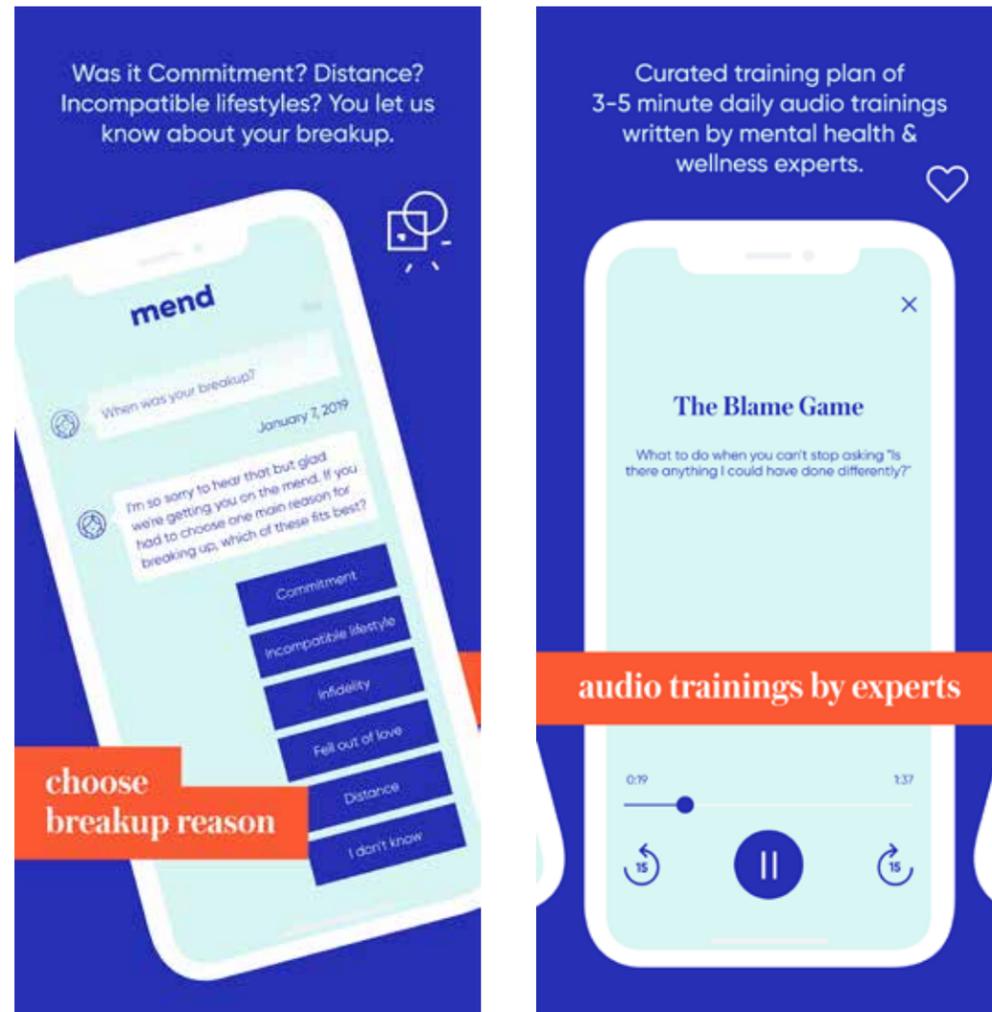


Breakup concierges

New services are hitting the market to help modern daters heal after heartbreak.

According to data from SONAR™, Wunderman Thompson's proprietary research tool, 86% of American singles say being single means they have more freedom, 83% say being single means they have more time for things they enjoy, and 77% say being single is their choice. But there are still hurdles to be cleared before reaching that point of contentment. As more and more people opt to stay single, driving a rising appreciation for singlehood, new services are shifting the cultural focus away from finding a match to smoothing the way for those coming out of relationships—and helping them enjoy the transition to life uncoupled.

Soft-launched in November 2019, Breakup Tours is a new travel service aimed at those coming out of relationships. The service personalizes itineraries based on individual circumstances and preferences, and offers curated “heart-healing and soul-cleansing” experiences, a Circle of Travelers feature to foster friendships, and bespoke “first-aid kits” tailored to each traveler, containing items such as therapeutic writing exercises.



“Breakup is hard as changes are hard,” cofounder Stephen Chung told *CNN Travel*. “When you stick to your routine, you become very aware of the things missing in your routine. Traveling allows you to break away. It gives you new perspectives.”

“What if your breakup was not a breakdown, but actually a breakthrough—a chance to lead a better life?” asks Lindsay Meck, CEO and cofounder of Onward. Launched in February 2019, Onward is a breakup concierge service that helps those exiting long-term relationships “physically relocate and emotionally relaunch their lives,” Meck tells Wunderman Thompson Intelligence.

The service tackles both logistics (moving, housing search, address/utility changes, furnishing setups) and holistic challenges (mental, financial, legal and physical health) for clients. Onwards matches members with a concierge who prepares a “personalized Road Map to solve immediate pain points and manage next steps,” Meck explains.

Why it's interesting:

These services are reframing the transition from coupled to single for a growing faction of consumers reveling in singledom, “creating a new conversation around a traditionally stigmatized narrative,” says Meck.

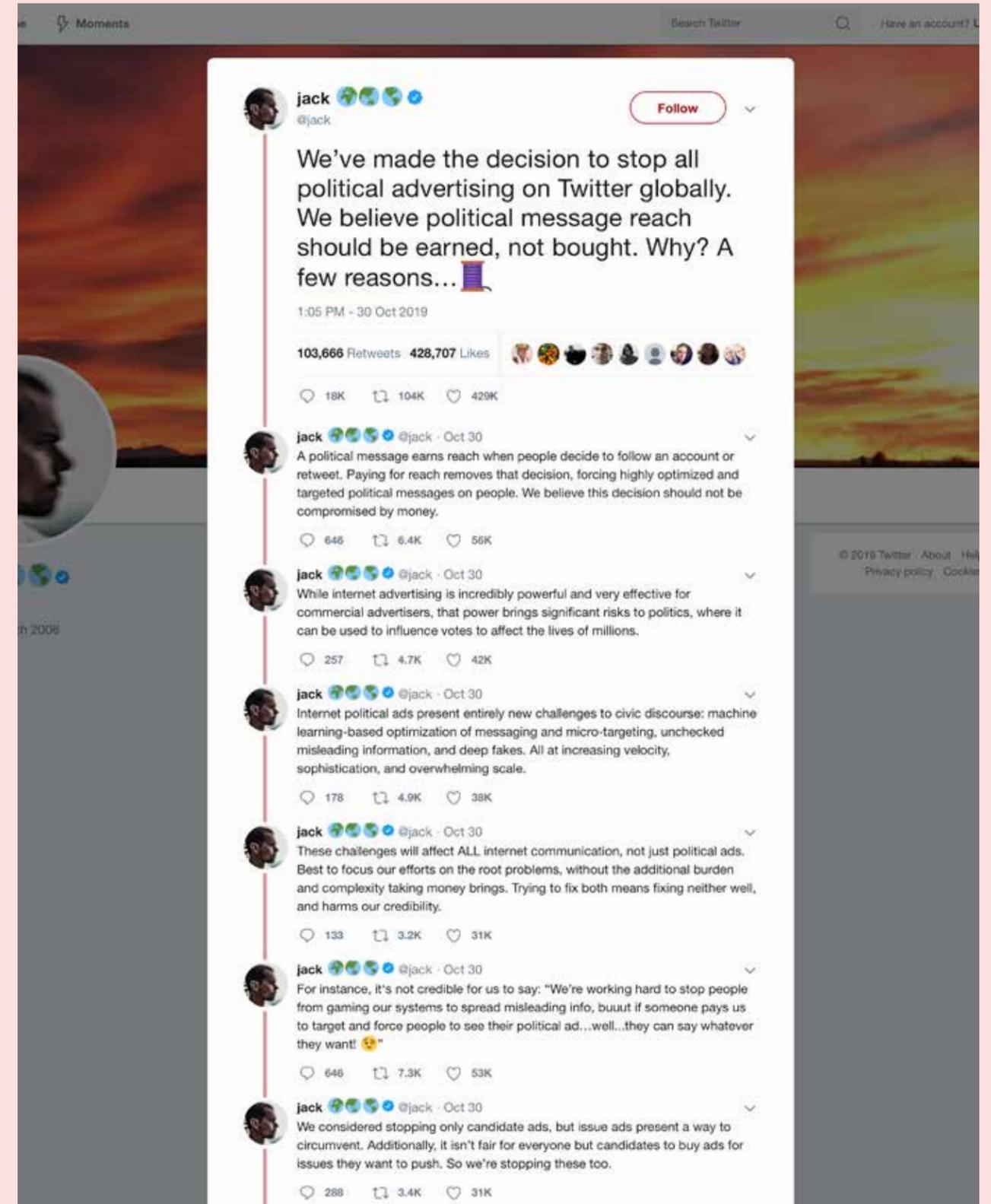


Taming tech's influence

In the run up to the 2020 US presidential election, politicians and tech companies alike are exploring ways to manage how political discourse plays out online, amid the Wild West atmosphere of social media.

In October 2019, Twitter CEO Jack Dorsey announced in a series of tweets that the company had “made the decision to stop all political advertising on Twitter globally,” as “we believe political message reach should be earned, not bought.” He added: “We’re well aware we’re a small part of a much larger political advertising ecosystem. Some might argue our actions today could favor incumbents. But we have witnessed many social movements reach massive scale without any political advertising. I trust this will only grow.”

Twitter’s actions could have “an unintended consequence or two” for users, as highlighted by the *Associated Press*. The article also stated that “among those potentially affected could be public-interest nonprofits eager to reach an audience larger than their official followers, challengers to incumbent



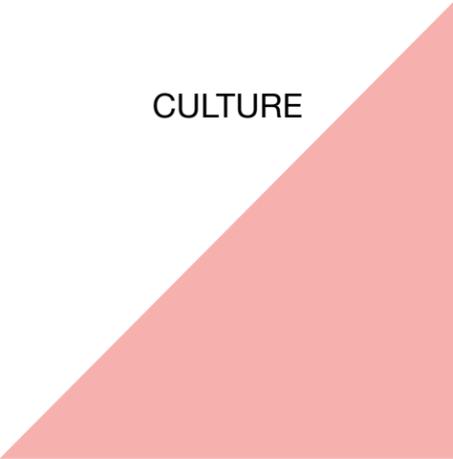
officeholders, and—obviously—political consultants who make a living placing ad buys for their candidates.”

There was outcry in the United Kingdom in November 2019 when the Conservative party rebranded one of its official verified Twitter accounts as “factcheckUK” during a debate between party leaders, in the run-up to the general election in December 2019. Following the move, Twitter said in a statement that “any further attempts to mislead people by editing verified profile information—in a manner seen during the UK election debate—will result in decisive corrective action.”

In late November 2019, Google said that it would limit the targeting of election advertising in the United States to general categories such as age, gender, and postal code-level location. In the past, political advertisers could target US Google ads based on public voter records and general political affiliations, such as left-leaning or right-leaning (Google had already prevented this practice in the EU and the United Kingdom). Scott Spencer, the VP of product management for Google Ads, published a blog post in November 2019 that referred to the changes. “Given recent concerns and debates about political advertising, and the importance of shared trust in the democratic process, we want to improve voters’ confidence in the political ads they may see on our ad platform,” he wrote. “Regardless of the cost or impact to spending on our platforms, we believe these changes will help promote confidence in digital political advertising and trust in electoral processes worldwide.”

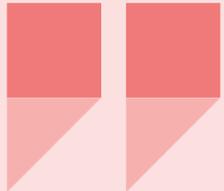
He also outlined how the internet giant’s policies prohibit “ads or destinations making demonstrably false claims that could significantly undermine participation or trust in an electoral or democratic process.”





We believe political message reach should be earned, not bought.

Jack Dorsey, CEO, Twitter



Spotify is the latest company to take a stand on political ads by announcing in December 2019 to suspend them on the music streaming platform from 2020.

On a macro level, Democratic candidate Elizabeth Warren has already made breaking up Big Tech's monopoly one of the central tenets of her campaign. Her plan, *Bloomberg* explains, involves "unwinding old acquisitions," such as Facebook's purchases of Instagram and WhatsApp, and ensuring "that the tech giants—those with more than \$25 billion in revenue—that operate an online marketplace or exchange, shouldn't be allowed to offer services that compete with the participants on those platforms." Amazon, therefore, wouldn't be allowed to sell both its own-brand products and third-party brands on Amazon.com. "Amazon crushes small companies by copying the goods they sell on the Amazon Marketplace and then selling its own branded version," Warren wrote in a March 2019 *Medium* article that set out the plan.

By rolling out its trial of hiding "likes" on a global scale, Instagram is addressing negative perceptions of some elements of the platform. "Our interest in hiding likes really is just to depressurize Instagram for young people," company head Adam Mosseri tweeted in November 2019. "It'll likely affect how much some people engage on Instagram, probably liking a bit less and posting a bit more, but the main thing we're trying to learn is how this affects how people feel."

Why it's interesting:

The wildfire speed of social media has taken political and social discourse to a new level in terms of pace, content, and veracity. Now, politicians—and tech companies themselves—are recognizing this, and aiming to turn the tide on the more malign aspects of its influence. Between the push of regulation and the pull of free speech, 2020 will see a new focus on how information, particularly the political, is disseminated through these channels.



Into the multiverse

Inspired by dystopic projections that nod to the end of the world, artists, designers and experimentalists are creating infinite alternative realities where time, space, energy and matter collide.

For Burning Man in August 2020, the event's temporary city will be themed around the multiverse, inspired by the theory that there are other universes beyond our own. As well as referencing paradoxical worlds, surrealism and pataphysics as inspiration, it will also explore "the quantum kaleidoscope of possibility," the organizer states, and offers attendees the chance to encounter their "alternate selves." With many provocative questions that probe quantum entanglement and the Many-Worlds theory, Burning Man 2020 will be a multidimensional creative testing ground where attendees can disconnect from the stress of today's anxious times and propel themselves into a limitless universe.

In June 2020, the Victoria & Albert Museum will invite visitors to "experience a mind-bending journey into Wonderland" with its in-depth exploration of Lewis Carroll's book *Alice's Adventures in Wonderland*. The exhibition, titled *Alice: Curiouser and Curiouser*, looks at the origins, adaptations and reinventions of the 155-year-old story, showing that the world of Wonderland and its characters not only stand the test of time, but also continue to inspire.





Immersive installations are also propelling audiences into another time, space and dimension. ZeroSpace in New York City, opened in summer 2019, transports visitors into a “multiverse where art, technology and humanity converge,” with its “immersive art playground” of large-scale installations from the world’s leading new-media artists. Otherworld in London leverages virtual reality to encourage people to leave reality behind and enter “a parallel universe of infinite possibilities.”

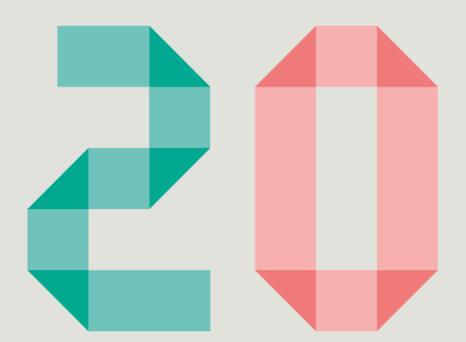
Why it's interesting:

While reality of late has pointed towards a dystopian future and hopeless outlook when it comes to the planet, artists are creating alternative worlds that inspire infinite possibilities. Consumers tired of today’s mundanity are seeking portals that offer escapism, adventure, and a glimpse of what life could be like elsewhere.





Tech & Innovation





Protective tech

In a world rampant with worry, brands are creating new products to soothe, reassure and offer security.

Confronted with unnerving environmental, political and economic instability, people are more anxious than ever. A survey by the American Psychological Association (APA) undertaken in April 2019 found that 32% of Americans felt more anxious than they had the previous year. A previous APA survey found that millennials are the most anxious generation to date. With this uptick in worry and unease, consumers are looking for products and services that offer comfort and protection from the world around them.

At Consumer Electronics Show (CES) 2019, the annual tech extravaganza, a host of products promising protection was showcased. Lishtot is a portable, keyring-shaped device that allows users to check the quality and safety of their water in an instant. Mitte, a smart water filter, promises to filter out modern aggressors such as microplastics, hormones and chemicals. Larq received an innovation award for its self-purifying water bottle, which is designed to remove “99.9999% of bacteria and viruses” from drinking water using UV-C LED technology.





Besides enabling people to breathe better air at home, we hope that Gunrid will increase people's awareness of indoor air pollution, inspiring behavioral changes that contribute to a world of clean air.

Lena Pripp-Kovac, head of sustainability, Inter Ikea Group



In a 2019 study, researchers at the Massachusetts Institute of Technology (MIT) found a direct correlation between happiness and air quality, showing that higher levels of pollution are associated with a decrease in people's happiness levels. With pollution reaching record-breaking highs—in November 2019, a public health emergency was declared in New Delhi due to overwhelming smog—brands are designing products that offer personal protection.

With its new product Bot Air, Samsung tapped into consumers' fear of harmful environmental factors that are invisible to the naked eye. Introduced at CES 2019, Bot Air is a self-operating air purifier that patrols the home and monitors air quality. Ikea plans to debut the Gunrid air purifying curtain in 2020; unique technology woven into the fabric breaks down air pollutants when light shines through it. "Besides enabling people to breathe better air at home, we hope that Gunrid will increase people's awareness of indoor air pollution, inspiring behavioral changes that contribute to a world of clean air," says Lena Pripp-Kovac, head of sustainability at Inter Ikea Group.

Why it's interesting:

Growing concerns about pollution and the negative impacts of the today's environment are behind a new wave of products and services created to mitigate unease about the world around us.



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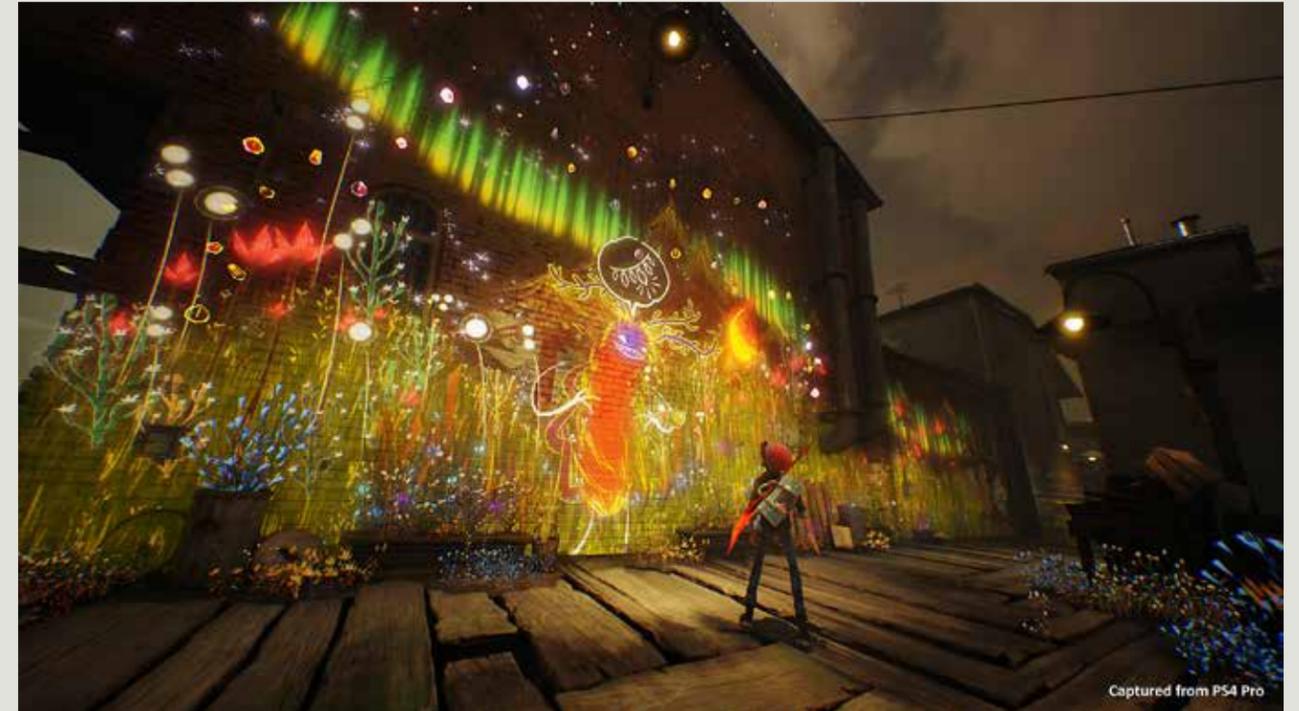
Anti-bullying gaming

Game designers are working to reverse the toxic behaviors that have plagued the gaming community.

In October 2019, Microsoft added a new Xbox Live feature that allows players to set filters on in-game messaging. The update gives each individual the power to decide “what’s acceptable and what isn’t in the text-based messages you receive across Xbox Live,” explains Microsoft.

Dave McCarthy, head of Microsoft’s Xbox operations, said in an interview with the *Verge* technology and media platform that there are stories of “female gamers in competitive environments being called all sorts of names and feeling harassed in the outside world, or members of our LGBTQ community feeling like they can’t speak with their voice on Xbox Live for fear that they’ll be called out. If we really are to realize our potential as an industry and have this wonderful medium come to everybody, there’s just no place for that.”

In November 2019, Samsung Brazil launched a local initiative in partnership with online game *Fortnite* to fight a specific type of cyberbullying. Players in the popular game can acquire “skins,” a graphic asset that changes a character’s





appearance, but the skins—which can cost around \$50—have become a status symbol among players, and those who can't afford the accessory are often mocked and ridiculed. To counteract this, the campaign created a new skin, called Aura Glow, that players can gift to other players to foster camaraderie and inclusivity.

Other games are also nurturing more constructive behaviors. Google's new gaming platform, Google Stadia, launched in November 2019 with an original exclusive game centered on an anti-bullying message. It takes players on “a journey where you face your worst fears and are confronted with the emotional impact of your actions,” the creator, Tequila Works, explains.

Released in October 2019, *Concrete Genie* is bringing a new perspective to gaming by encouraging players to turn to art as an antidote to bullying. Created by Sony's in-house studio Pixelopus, the game is designed to inspire players to counter negativity with creativity, offering a new framework of positivity in the gaming community. The goal, explains Pixelopus designer Jing Li, is to help the player feel “like they're the light of the world, and they're the magician of the world. And we want them to feel like they're filling the world with art and creativity and positive energy.”

Why it's interesting:

The gaming community, which has been often been blamed for rewarding violence and normalizing toxic behavior, is banding together to build a more positive, safe and welcoming space.

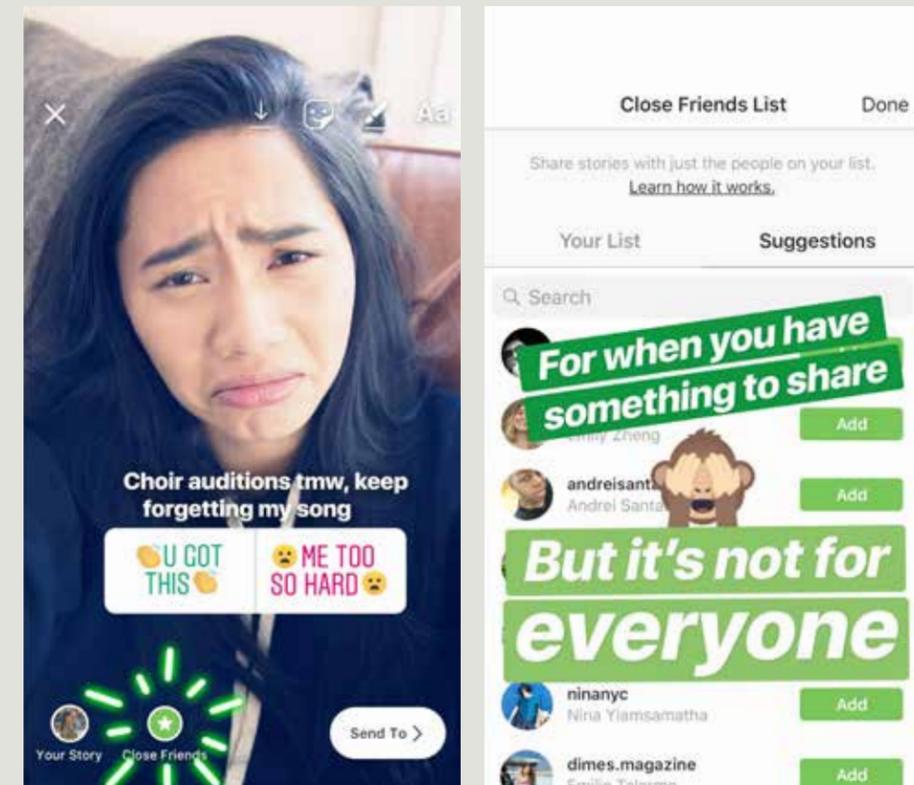


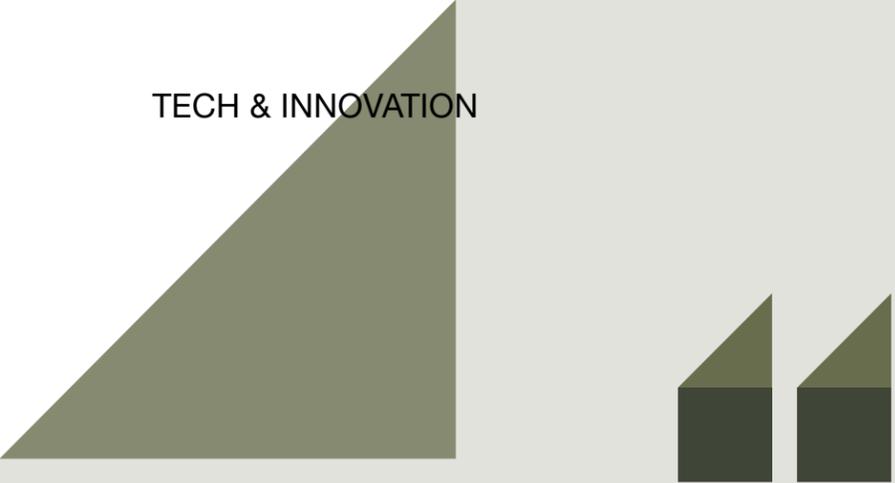
New digital communities

Social media is having a private moment, as a new generation of users eschews the endless friends list in favor of more intimate connections with a select few.

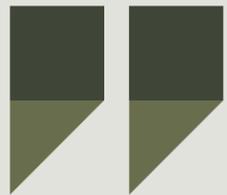
Fueled by a growing desire for privacy, authenticity and wellbeing, young consumers are seeking ways to digitally engage with only their closest companions, whether through bite-sized direct messaging communities, such as the new Threads app from Instagram, or niche interest-based groups on Discord. In our article on social media safe havens we reported on a survey of 1,500 generation Zers and millennials by the Royal Society for Public Health in the United Kingdom. Many respondents said that platforms such as Instagram put too much pressure on users to display perfect versions of themselves online, and many users are wising up to the influencer culture's effect on their mental health.

Threads launched in October 2019 with a mission to help users more seamlessly communicate to their true confidantes the personal information they





As consumers shift into smaller, tight-knit, like-minded groups, brands will have new opportunities to make more deliberate and genuine connections in these online spaces.



don't want to share with their hundreds of followers. Friends on Threads can easily keep in touch throughout the day even if they can't talk thanks to a feature called Auto Status, which, when turned on, communicates whether a user is on the move or out to eat.

In July 2019, Snapchat leveraged its first global campaign to show how its platform helps family members and pairs of friends from around the world stay close and connected. Snap Inc's chief marketing officer Kenny Mitchell told *Adweek* that the Real Friends campaign demonstrates that Snapchat is "really a response to some of the challenges of social media. It became a bit of an escape from social media, where people can really be themselves." Earlier in 2019, Snap launched Bitmoji Party, a multiplayer mobile game played with users' virtual avatars, which offers an alternative terrain for interacting with best pals.

Even Tumblr, a platform known for cultivating niche communities for creative expression, is exploring ways to make public chat groups a staple of its repertoire. In November 2019, it began testing the messaging feature on its mobile platform, giving thought leaders the chance to form discussions based around extremely specific hobbies and passions, from self-care to K-pop.

Why it's interesting:

"It takes a new business mindset, but this is the future of marketing," Mark Schaefer, author of *Marketing Rebellion*, tells Wunderman Thompson Intelligence. As consumers shift into smaller, tight-knit, like-minded groups, brands will have new opportunities to make more deliberate and genuine connections in these online spaces. "To accomplish this, you have to be invited into these groups," he says. "You have to treat people like friends, not prospects."

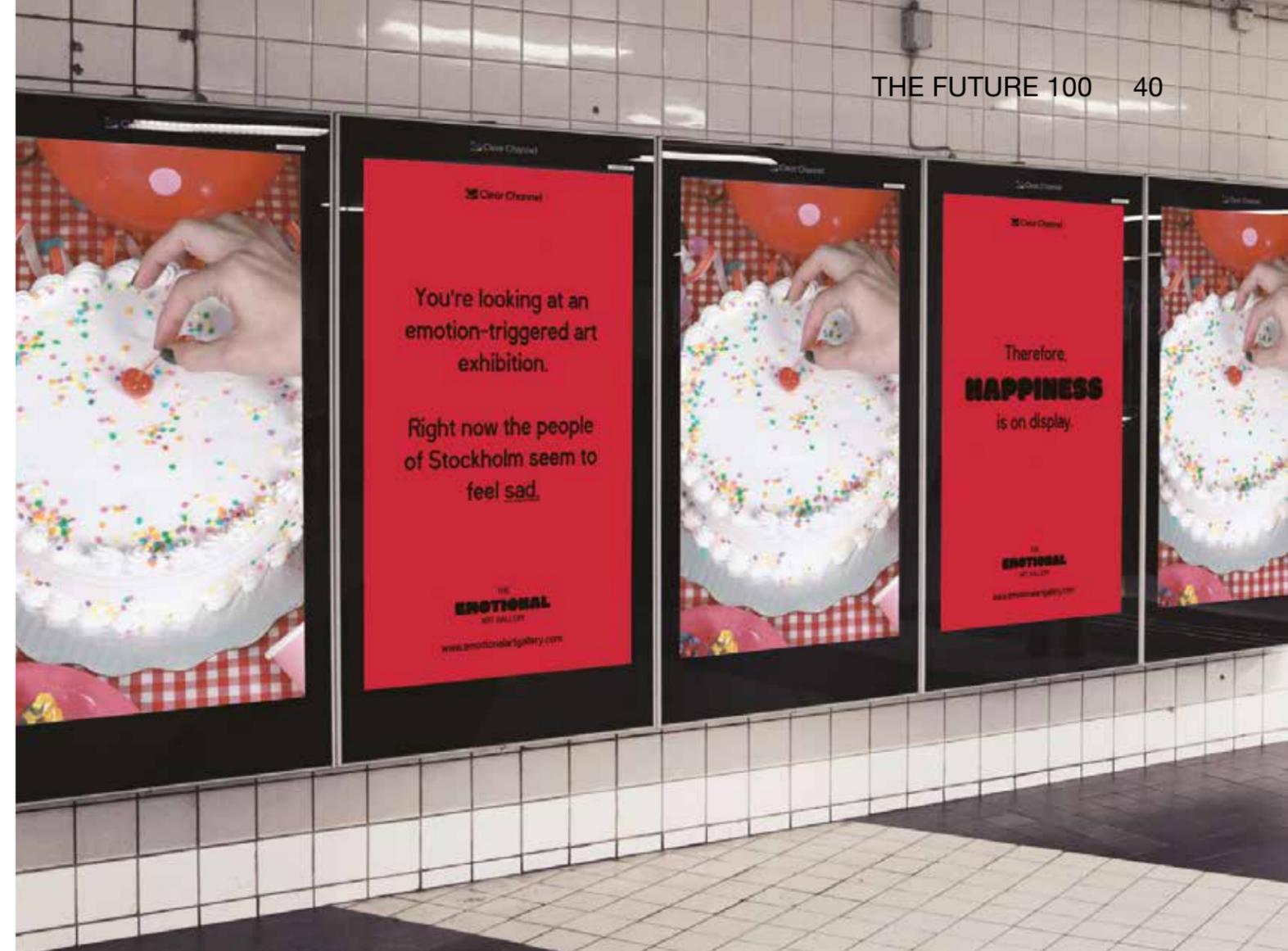


Sentient tech

Brands are using new technologies to recognize and respond to human emotions, with the aim of relieving stress and anxiety.

In March 2019, Clear Channel in Sweden launched the Emotional Art Gallery, a series of 250 digital billboards in Stockholm's metro stations that used digital artworks to reduce commuter stress. Harnessing data available from Google searches, social media, news articles and traffic information, the system selected an art piece to display on each screen, responding in real time to the mood of the city. The works all aimed to instill positive emotions in travelers, enhancing feelings of comfort, calmness, happiness and energy.

In October 2019, Microsoft's research artist in residence Jenny Sabin unveiled Ada, an emotionally responsive AI sculpture, at Microsoft's Redmond campus. Ada is a large, skeletal-like structure that is able to translate people's emotions into a colorful display. When a person in the building interacts with a camera or microphone, Ada reads their facial expressions and tone of voice, and responds in real time by changing color. The more people engage with the sculpture, the more alive it seems, colorfully fluctuating between a range of emotions.



Korean car manufacturer Kia is aiming to incorporate emotion-reading tech into the daily lives of its drivers. At the CES 2019 tech show, the company unveiled its Real-time Emotion Adaptive Driving (Read) system, which monitors a driver's emotions using bio-signal recognition. The system analyses facial expressions, heart rate and electrodermal activity to decipher the driver's emotional state and adjusts the car accordingly, for example by altering the lighting or the music to reintroduce a sense of calm.

Why it's interesting:

Technology has long faced scrutiny for its effects on our mental health. Now it's providing new ways to help enhance our wellbeing.





Speed-control entertainment

As attention spans grow ever shorter, tech solutions are being developed that speed up cultural experiences—but at what creative cost?

Directors and actors were aghast in fall 2019 when Netflix tested a function that could speed up or slow down its content on Android devices. Filmmaker and actor Judd Apatow called the move “ridiculous and insulting,” while director Bill Bird tweeted that the feature was “another spectacularly bad idea, and another cut to the already bleeding-out cinema experience.” Why, he questioned, “support and finance filmmakers’ visions on one hand and then work to destroy the presentation of those films on the other?”

Perhaps one factor that drove Netflix’s move is the oft-cited figure that the attention span of generation Zers is a mere eight seconds, compared to millennials’ attention span of 12 seconds. The speeding up and shortening of media content comes amid the rise of social platforms such as TikTok, whose 15-second videos have been an enormous hit with gen Z.

Among the roster of streaming services flooding on to the market is Quibi, a platform that will offer “snackable” eight-minute video content when it launches in April 2020. The platform has been founded by veteran producer Jeffrey

Katzenberg, while Meg Whitman, who previously headed Hewlett Packard, is its CEO.

“What we say internally is we’d like to be the quality of HBO and offer customers the convenience of Spotify,” Whitman told the *Los Angeles Times*. “We’re not Facebook Watch. We’re not Snapchat. We’re not Instagram TV. We’re not YouTube. We’re Quibi, and it’s not denigrating those platforms at all... but we’re staking out a premium position relative to those.”

The service will cost about \$5 a month with ads and \$8 a month without ads, and according to the *LA Times*, it will offer “premium films shot by award-winning directors like Steven Spielberg and Catherine Hardwicke and present them in short episodic chapters.”

Why it’s interesting:

As attention spans shrink, entertainment companies are striving to find new ways to create the bite-sized content that they believe will appeal to younger consumers. But at the same time creators are pushing back against this, aiming to preserve the immersive, absorbing nature of a cultural experience. As tech allows for an ever more customizable cultural experience, time will tell which stance wins out.



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The new rules for facial recognition

Privacy concerns are increasingly trumping convenience in the world of facial recognition.

Brands employing the tech can survive public backlash and tightening regulations, but only if they change their tactics.

In November 2019, Chaayos provoked a storm of outrage on Twitter after the Indian cafe chain forced customers to pay for their drinks using facial recognition technology, with no clear way to opt out. Countless US companies have faced similar discontent over the technology, including Ticketmaster's parent company Live Nation Entertainment (LNE). Protesters claimed LNE's efforts to develop facial recognition at concerts in a bid to replace traditional ticketing could harm at-risk communities (see our report on facial recognition tech for more).

As brands increasingly begin to recognize facial recognition's potential, it seems consumers aren't quite ready for a mass roll-out. Approximately 60% of US consumers think that brands and companies storing images of their faces is creepy, according to a report from SONAR™, Wunderman Thompson's proprietary research tool.

A marked shift in how regulators think about facial recognition technology is expected in 2020, especially when it comes to protecting people's data and privacy. Brands will see more rules denoting how and when data can be used. Brittany Kaiser, a data transparency advocate and former business development director for Cambridge Analytica, tells Wunderman Thompson Intelligence that data garnered from the likes of facial recognition tech has the potential to be treated in the same way as property rights.

“The idea is, in the future, that we'd have a lot more access and transparency into who wants what type of data,” Kaiser says. “Then we would have the choice to produce or share that data with all of those organizations, be it for profit or non-profit, or governmental, or anyone interested in using those data sets.”

There's one exception to all this: China. “At the end of the day, the privacy concerns around biometrics in China are very different from the United States,” John Artman, editor in chief of *TechNode*, tells us. “In the United States, facial recognition is seen as kind of something Orwellian—1984-ish, Big Brother is watching you—whereas in China, it's just like ‘Hey, I can use my face—alright, why not?’”



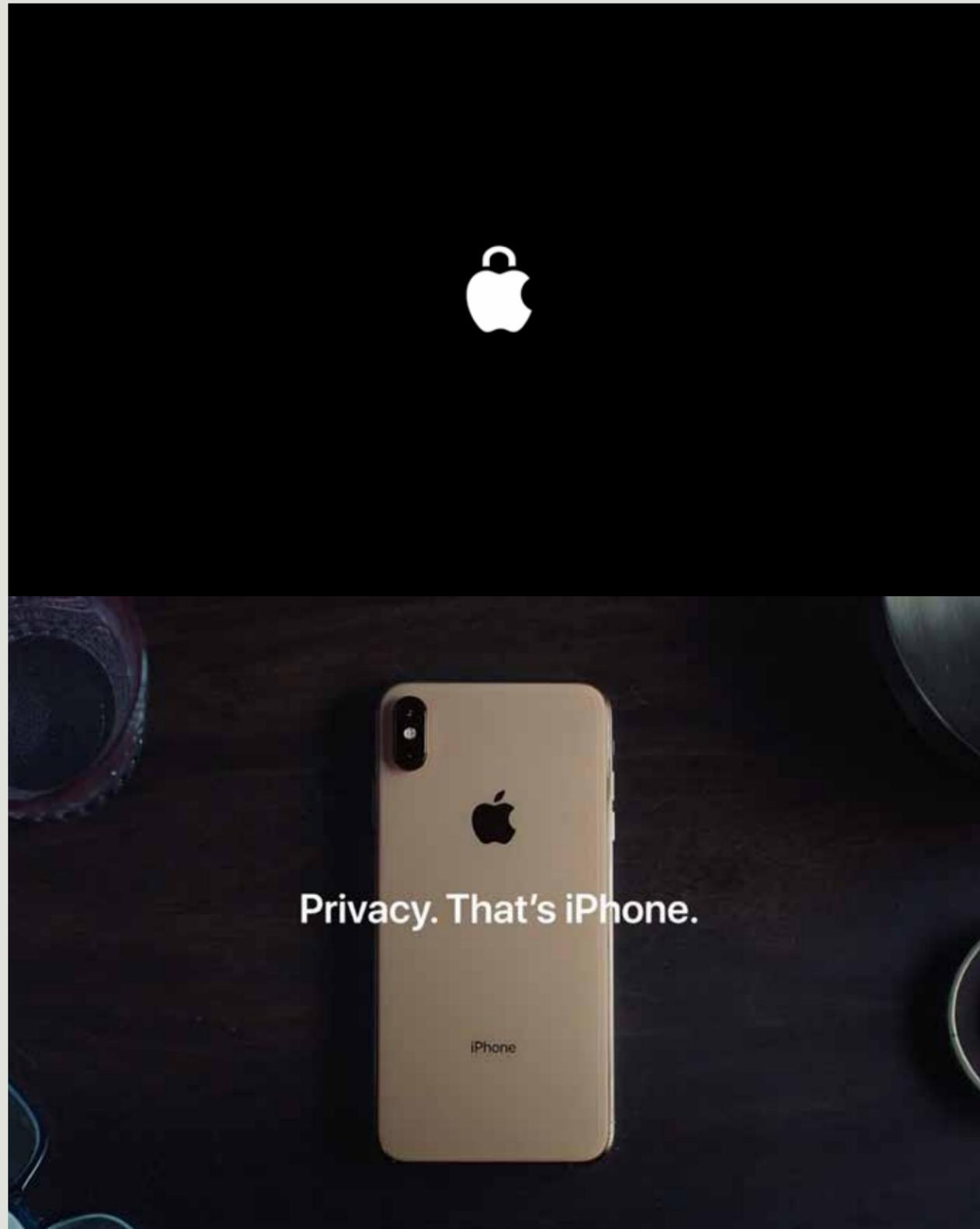
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John Artman, editor in chief, TechNode



Why it's interesting:

Facial recognition provides countless opportunities for brands to collect data on customers to improve and hyperpersonalize their shopping experience, and also offers unprecedented convenience. However, companies will need to be transparent about how they plan to use the data in order to retain the trust of customers and lawmakers. “If people don't want to be bothered then they'll tell you that and you can stop wasting your advertising spend on them,” Kaiser says. “In the end, it's actually an improvement of the business model because you're cutting out people who don't want to be advertised to and you're going to get real, updated information in order to target a better experience to the customers who do want to interact with you.”



The privacy era

The day of reckoning arrives for data privacy.

Data use was originally intended to help make consumers' lives easier by connecting them with personally relevant information, products and services, with minimal effort. But this intent was quickly forgotten as brands fell prey to the siren call of data mining. Today, brands' use of data is generally perceived as underhanded and unethical: 89% of consumers feel that the way companies collect and use data is "sneaky," according to SONAR™, Wunderman Thompson's proprietary research tool. Today, with consumers nearing breaking point amid increasingly frequent and severe data breaches—from the seminal Cambridge Analytica scandal to the massive Equifax credit breach to the September 2019 Ecuador data leak—brands are starting to course-correct, shedding light on their policies and practices.

"Brands are getting more aware that developing loyalty means transparency," Brittany Kaiser, data transparency advocate and former business development director for Cambridge Analytica, tells Wunderman Thompson Intelligence. "It doesn't mean constantly trying to grab your consumers' attention. It means developing a conversation and a trusting relationship."



This idea that we can control our own data and our digital identity is not a figment of our imagination or a wild hope for the future, it's actually possible.

Brittany Kaiser, data transparency advocate



Big Tech companies—arguably some of the worst offenders—are tripping over each other in their rush to release new privacy initiatives in a bid to regain consumers' trust.

Apple is leaning heavily into privacy with its 2019 campaign, which featured slogans such as “Privacy. That’s iPhone.” and “What happens on your iPhone, stays on your iPhone.” In November 2019, Apple updated its privacy website to read like its product pages, communicating its privacy policies in a simple, intuitive and easily digestible format. This addresses the 68% of consumers who find companies’ terms and conditions and privacy policies difficult to read, resulting in only 28% reading them often, according to findings from SONAR™, Wunderman Thompson’s proprietary research tool. This follows Apple’s September 2019 rollout of the iOS 13, an updated operating system that puts data privacy front and center. One of its features blocks voice over internet protocol (VoIP) apps from running in the background when not in use, preventing these apps from collecting data from unwitting users.

In October 2019, Google announced a new Password Checkup function that automatically checks users’ passwords for security concerns, alerting

them if their passwords are vulnerable or have been compromised in a third-party breach.

In May 2019, Google opened a privacy engineering hub in Europe. The new Google Safety Engineering Center (GSEC) is founded on the belief that “privacy and safety must be equally available to everyone in the world” and will work on “building privacy and security into the core of our products,” explains GSEC CEO Sundar Pichai.

Why it's interesting:

While these initiatives mark the first step in repairing the damage already inflicted in the data privacy battle, there is still a way to go. “This idea that we can control our own data and our digital identity is not a figment of our imagination or a wild hope for the future, it’s actually possible,” says Kaiser—and brands that are able to reliably and ethically bring this future to fruition will find success among consumers.





Haptic tech

Haptic technology is set to gain significant traction in 2020, empowering companies to offer a tactile experience for virtual environments.

Haptics refers to any technology that produces the sensation of touch and motion. It works in tandem with AR (augmented reality) and VR (virtual reality), simulating physical interaction in an otherwise audiovisual landscape. A raft of haptic products that made a splash at the CES 2019 tech show will hit the market in 2020, just as 5G rolls out in most major markets around the world, offering the necessary processing power to seamlessly run the tech. Everyone from Alibaba to Disney is racing to explore how the technology can augment their current offerings.

Retail has been quick to adopt this innovation. Alibaba in China, the largest marketplace in the world, has launched its Refinity haptic technology solution, which brings a multisensory experience to online shopping. Gone are the days when potential buyers had to imagine how a product might feel. “The ability to simulate texture and fabric on smartphones and tablets is a breakthrough for



online shopping, connecting the physical and digital worlds,” explains Dominique Essig, chief experience officer at Bonobos, a US online retailer that has collaborated with haptic technology firm Tanvas.

Education is another area already innovating with haptics, as the tech empowers people to test their skills and make mistakes without harming others or themselves. For example, UK-based medical training software company Generic Robotics uses haptic technology and VR to train health professionals in real-world simulations, without the need to practice on actual patients.

Brands have also been quick to realize the opportunities afforded by haptics to the \$150 billion gaming industry. Facebook’s Research Lab is working on a sensory wristband called Tasbi, while Disney has produced a prototype for its haptic Force Jacket. Both are designed to produce physical sensations for VR environments.

In addition to making a digital experience more realistic, haptics can also activate something far more fundamental. As the Fulu website of London-based designer Ryo Tada states, “Touch is important for creating trust and empathy, such as when babies first create a connection with their mother by a simple touch.” Fulu is a fingernail-mounted haptic interface, much like EPFL’s artificial skin, developed by Tada at the Royal College of Art.

There are clear benefits for brands that elicit an emotional response from consumers, so haptics are being employed across a range of industries, from gaming to advertising and beyond. The 2017 “Ads You Can Feel” study by IPG and Immersion found that ads with haptics outperformed traditional versions on a number of indicators. Perhaps most significantly, ads with haptics outperformed standard ones by a wide margin among potential new customers.



**Why it's interesting:**

Haptic technology is set to revolutionize everything from entertainment to education. It elevates 3D digital environments to something far more interactive and emotional. As haptic-enhanced products improve, demand will grow and R&D will see further investment. Now's the time for brands to assess how haptics can enhance their product innovation strategy.



Touch is important for creating trust and empathy, such as when babies first create a connection with their mother by a simple touch.

Ryo Tada, designer, Fulu



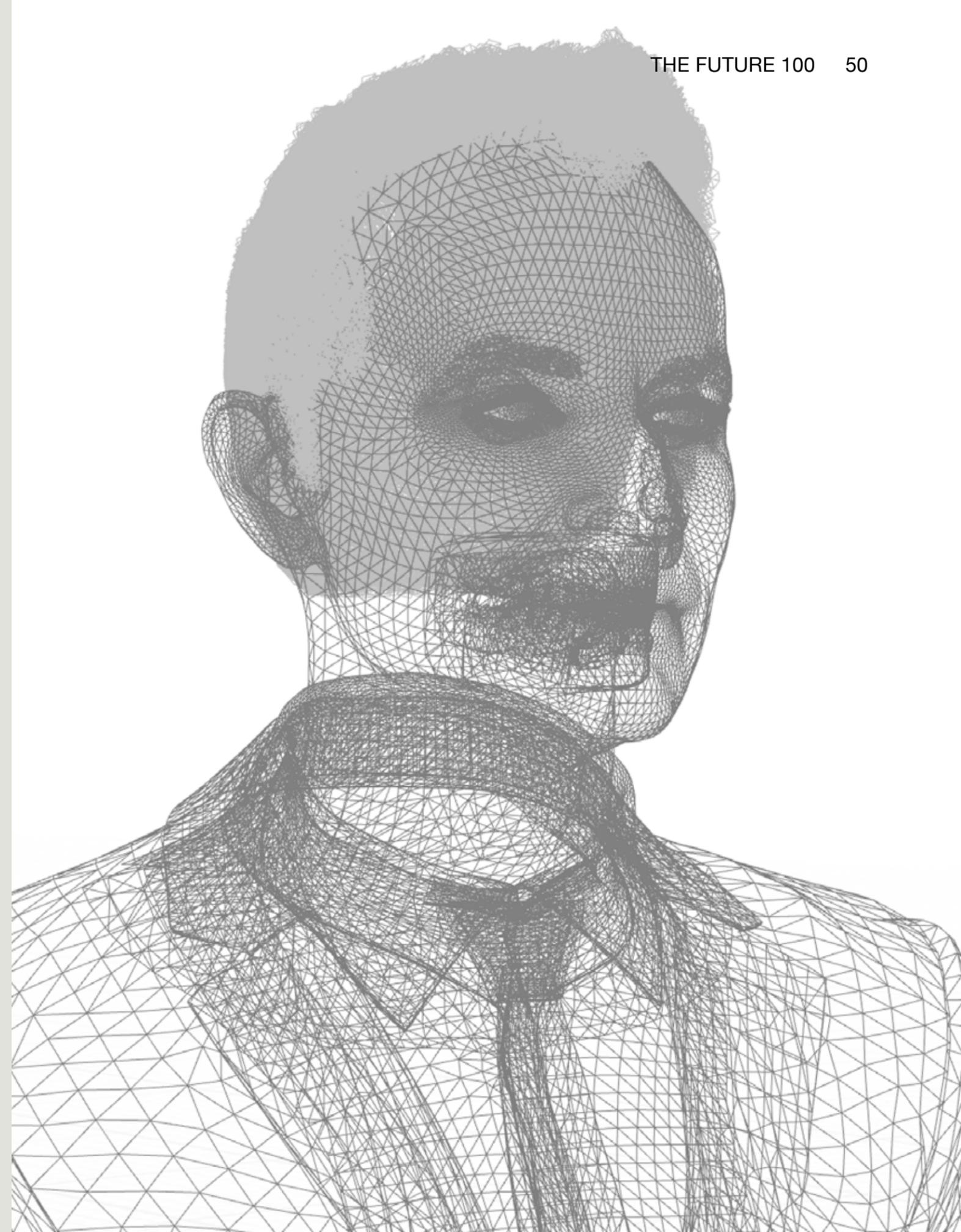
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Navigating the AI workplace

AI in the workplace is evolving from simple automated chatbots towards more cognitive functions.

Companies around the world are adopting avatars and AI software for recruitment purposes. While offering savings in terms of time and cost, this technology is rife with potential hazards and public concern is high. Data from the UK's Royal Society of Arts revealed that 60% of consumers were opposed to the use of automated decision-making in recruitment, and some law firms are already preparing to act in AI-related lawsuits.

With over 700 clients, including Unilever, Hilton, JP Morgan Chase, Delta Air Lines, Vodafone, Ikea and Goldman Sachs, HireVue offers software for video interviews and pre-hire assessments that scans candidates' language—from active or passive phrasing to tone of voice to speed of delivery—and also analyses facial expressions, such as furrowed brows, smiles and eye-widening.





This part of the recruitment process has become so common that some universities are even beginning to offer students training for AI-driven interviews.

While some applaud the use of AI in removing human bias, there are widespread concerns about the effectiveness of the platform. In her October 2019 book *Artificial Intelligence: A Guide for Thinking Humans*, author and Portland State University computer science professor Melanie Mitchell notes that there are a number of flaws in the systems currently at play. AI can be easily tricked and is vulnerable to hackers, and facial recognition technology is significantly more likely to produce errors when applied to people of color.

The global law firm Paul Hastings launched an AI practice group in March 2019 to help clients using AI services and products. The aim is to assist clients to defend against class-action lawsuits and give legal advice in areas such as compliance with laws and regulations, data privacy issues, AI governance and ethics. “AI tools are going to drive decisions like who ought to be promoted and

who should be fired,” Bradford Newman, a member of the law firm’s AI practice group, told the Society for Human Resource Management. “When you have algorithms making decisions that impact humans in one of their most essential life functions—which is their work—there are going to be issues of fairness and transparency, and legal challenges, and I think we are going to see those legal challenges start very soon.”

Cognitive AI that’s less oriented to decision-making is, however, proving more palatable. Already gaining in popularity in China—where California-based tech company Oben is at the forefront—AI avatars will likely encounter fewer hurdles.

In January 2019, China Central Television, the country’s largest broadcast network, aired its Lunar New Year special, which was viewed some 1.8 billion times. Four life-sized “personal artificial intelligences” (PAIs)—three-dimensional holographic replicas of the show’s presenters—moved, spoke, and even sang. Oben, which produced the PAIs, is banking on eventually developing the technology for mass consumption, potentially as celebrity stand-ins or in the workplace for remote meetings.

China’s Xinhua News Agency began using avatars on air at the end of 2018. The avatars were created in collaboration with the search engine Sogou and allow for “tireless” 24-hour news broadcasts.

Why it’s interesting:

In her book, Mitchell questioned which problems in AI were still unsolved. Her ultimate answer was, simply, all of them. AI as a decision-maker is already posing uncomfortable questions in the workplace and there are concerns among a majority of people. With questions of bias and ethics at play, deeper regulations are not far behind—so brands will have to tread carefully.



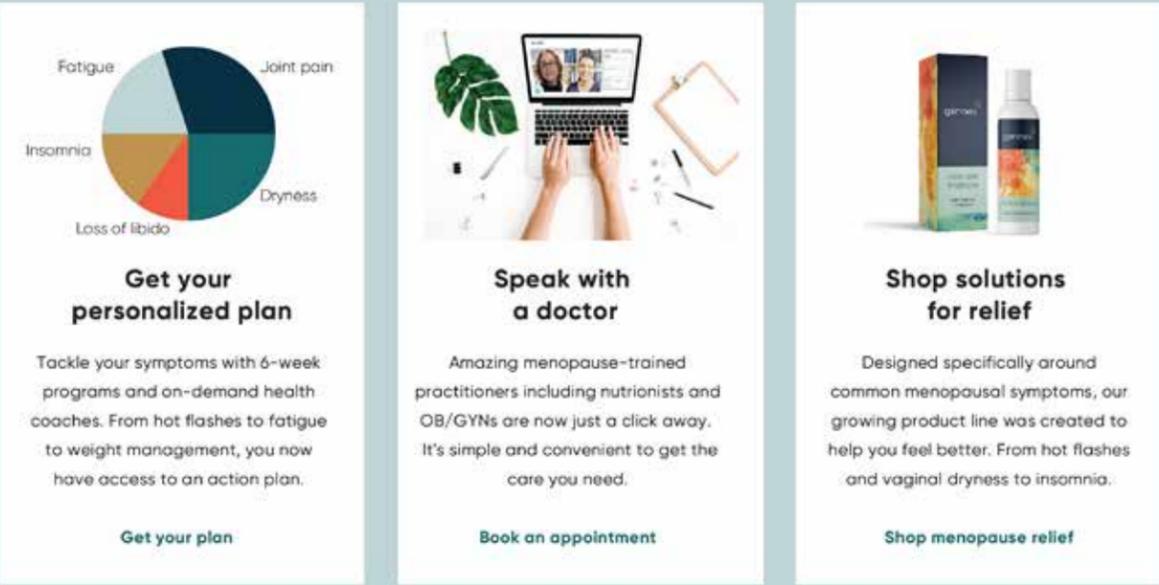
Menotech

New digital-forward resources and tech-enhanced products are reinvigorating life during menopause for an increasingly tech-savvy consumer base.

By 2025, women experiencing menopause will make up 12% of the entire global population, according to the United Nations. While the market for advances in this area remains largely untapped due to residual stigma, pioneering brands are working to change this.

Apple hopes to advance knowledge of women's health and contribute to "the next generation of innovative health products." In November 2019, Apple launched a new health app with an opt-in women's health study to help consumers and doctors better understand menopausal transition, among other gynecological events and conditions. This is crucial because, currently, "there is

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no ‘what to expect when you’re expecting’ for menopause,” Jill Angelo, CEO of digital health platform Gennev, tells Wunderman Thompson Intelligence. “Technology gives us the means to start to build that data.”

Gennev is also leveraging data and technology to help improve the experience for women going through menopause. “We’re using technology to start to build the world’s largest database of menopausal health data that, over time, will allow us to recommend and create a roadmap for women in menopause where none exists now,” Angelo reveals. The platform puts technology at the core of its offering to help empower women and demystify menopause.

In March 2019, men’s health startup Ro launched Rory, a new vertical for women in perimenopause, menopause and postmenopause. Rory merges telemedicine with the direct-to-consumer model to bring digital health to this

I hope that, collectively, this focus on menotech will start to normalize menopause so that it’s not this thing that’s brushed under the rug.

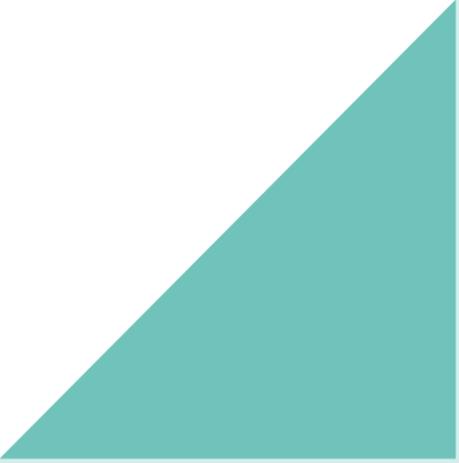
Jill Angelo, CEO, Gennev

generation of women. Through Rory, women are able to connect direct with health providers, treatments, information and community.

“I hope that, collectively, this focus on menotech will start to normalize menopause so that it’s not this thing that’s brushed under the rug,” says Angelo. “Technology is an enabler. I’ve seen what it does to transform how we think about education, or banking, or personal finance, or healthcare; menotech is just another slice of that. And we’re just beginning.”

Why it’s interesting:

Women in their 50s, 60s and 70s have been largely overlooked by brands and marketers. But as this vibrant cohort is increasingly upending the status quo, defying expectations and ditching tired stereotypes, the market is ripe with opportunity for tech brands to innovate menopausal and perimenopausal lifestyles.



21

Travel & Hospitality

30



Biocontributive travel

The travel industry is cleaning up its act with a wave of pioneering initiatives that move beyond doing no harm to actively contributing to a carbon-positive future.

Norway broke ground on the world's first energy-positive airport city in late 2019. Oslo Airport City will be powered entirely by renewable energy and will also function as a local source for clean power; it will have the capacity to sell all surplus energy it generates to neighboring buildings and communities, extending sustainable contributions beyond city limits. The city will also serve as a testing ground for urban initiatives to reduce carbon emissions, piloting innovative green technologies including driverless electric cars, automatic lighting for streets and buildings, and smart-tech solutions for waste and security management.

“This is a unique opportunity to design a new city from scratch,” Tomas Stokke, director at Haptic Architects, told *Dezeen*. “With the latest developments in technology, we will be able to create a green, sustainable city of the future.”

The development, which is backed by the Norwegian government, is an extension of Norway's nationwide initiative to transition from oil to green energy.

Oslo Airport, which is owned by the Norwegian government, plans to run a fleet of electric-only vehicles by 2025, and by 2040 all short-haul flights in and out of Norway will be run on electric aircrafts.

In Trondheim, 300 miles north of Oslo, Snøhetta unveiled the world's northernmost energy-positive building in September 2019. The Norwegian city is situated 63 degrees above the equator and here sunlight varies drastically between seasons, presenting what the architecture and design firm describes as “a unique opportunity to explore how to harvest and store solar energy under challenging conditions.” Called Powerhouse Brattørkaia, the building produces more than twice as much electricity as it uses daily. Unused resources will supply renewable energy to neighboring buildings, electric buses, cars and boats through a local micro grid.

Snøhetta describes the project as “aiming to set a new standard for the construction of the buildings of tomorrow: one that produces more energy than it consumes over its lifespan, including construction and demolition. This also includes the embodied energy in the materials used to construct the building.”

Snøhetta is also espousing this standard with Svart hotel, which will become the world's first energy-positive hotel when it opens in 2021, generating more solar energy than it uses—including enough energy to power its own construction.

Why it's interesting:

Doing no environmental harm is no longer enough. As these projects prove, the future of travel, tourism and hospitality will be rooted in conscious contributions to a carbon-positive future.





Gated tourism

As popular sightseeing destinations become overrun with tourists, new regulations are limiting entry—and laying the groundwork for a future iteration of luxury travel.

With over-trafficking putting culturally significant sites in danger of destruction, gatekeepers are enforcing stricter measures for those who wish to visit—or closing them to the public altogether.

Uluru is a sacred site for Australia's aboriginal Anangu people. For decades the remote rock in the Northern Territory has annually attracted hundreds of thousands of tourists intent on scaling the summit—in spite of the many signs imploring visitors to stay off the rock, both out of respect for the Anangu people and for their own safety. “It is an extremely important place, not a playground or theme park like Disneyland,” Anangu community member Sammy Wilson, former chair of the Uluru-Kata Tjuta National Park board, told the BBC.

In October 2019, the site permanently closed to climbers in deference to the Anangu people. Yet in the face of impending closure tourist numbers significantly increased: Parks Australia reported that the site received 70,000 more visitors in 2018 than in 2017, when the ban was announced.





Overcrowding is occurring worldwide. In April 2019, during the Netherlands' famous tulip festival, barriers were erected in an attempt to prevent tourists from destroying the fields of flowers in their pursuit of the perfect picture. In an interview that appeared in the *Guardian*, translated from Dutch paper *Algemeen Dagblad*, Simon Pennings, a grower near the town of Noordwijkerhout in the bulb region of south-west Netherlands, remarked that the visitors “are so careless.” He said that while the large groups of people visiting can be fun, they flatten everything. “It is a shame and we suffer damage as a result. Last year, I had a plot with €10,000 (\$11,000) in damage. Everything was trampled... They want to take that selfie anyway.”

In addition to the tulip fields being fenced off, the Dutch tourism board released a dos and don'ts guide to photographing the flowers. The local tourist office also organized a group of ambassadors to teach visitors about the history of the fields and the work that goes into maintaining them.

In March 2019, the *Washington Post* reported that Lake Elsinore, a small city in southern California, declared a public safety crisis after “Disneyland-size crowds” descended to witness a rare “super bloom” of wildflowers.

In order to protect such landmarks—not to mention the safety, livelihood and religion of local inhabitants—many sites are instituting new requirements for entry. In December 2018 the renowned I Amsterdam sign in front of the city's Rijksmuseum was removed in an effort to staunch overtourism and since then the Dutch capital has been developing an initiative that targets and attracts luxury travelers. “Focusing on this group will get locals excited about welcoming travelers, as opposed to being concerned about the number of tourists,” says Antonia Koedijk, North America director of the Netherlands Board of Tourism and Conventions.

Other heritage sites are implementing high-end hurdles for entry. In October 2019 Indonesia announced a new membership system to limit the number of visitors to famed Komodo National Park; premium memberships will go for \$1,000 and grant full access to the entire park—including Komodo Island—while non-premium memberships will give access to specified areas only. At Machu Picchu a stricter ticketing policy was instituted in January 2019. In April 2019 the Philippines' Boracay Island introduced a ban on cruise ships during peak season. In May 2019 Iceland announced that the popular Fjaðrárgljúfur canyon will be open to visitors for only five weeks each year.

Why it's interesting:

To preserve iconic sites and ecological marvels, stanchions are being put in place to restrict overcrowding at heavily trafficked landmarks. The ensuing costly entrance fees and restrictive access are turning these sites into exclusive destinations for luxury travelers.



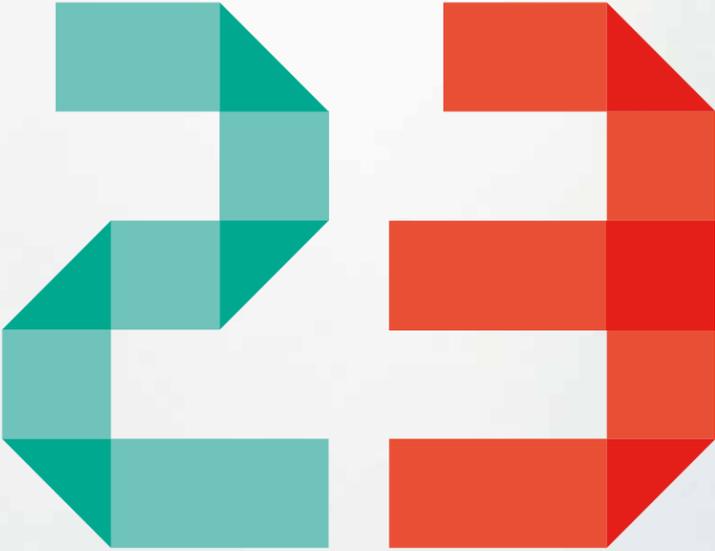
Scientific expeditions

Modern explorers are going to the ends of the earth in pursuit of once-in-a-lifetime experiences—and the opportunity to contribute new findings to the scientific community.

In December 2019, Airbnb hosted Antarctic Sabbatical, a month-long research expedition for five intrepid travelers. Run in partnership with Ocean Conservancy and led by environmental scientist Kirstie Jones-Williams, the program's mission was to better understand the impact of microplastics on the Antarctic ecosystem. Participants, who were not required to have any scientific background or experience, received a crash course in glaciology, field sampling and research protocols before arriving in Antarctica.

Ahead of the trip, Jones-Williams let participants know that this was a vacation with a difference: "This expedition will be hard work, with scientific rigor required during unforgiving wintry conditions. We are looking for passionate individuals with a sense of global citizenship, who are excited to be a part of the team and to return home and share our findings with the world."

Travel company Luxury Action is also catering to citizen scientists with an excursion to the North Pole in April 2020. "We provide all of the equipment,"





We're not just providing the experience, we want to spread the word on what's happening.

Janne Honkanen, founder, Luxury Action

Luxury Action founder Janne Honkanen told CNN, “but you definitely need to have the spirit of an explorer or scientist.” It is billed as the world’s northernmost hotel, and those who can afford the \$100,000+ price will stay in heated igloos, accompanied by arctic wilderness guides and private security teams.

“We’re not just providing the experience, we want to spread the word on what’s happening,” Honkanen said. “How the climate crisis affects local culture, local food and the Arctic animals—we see the effects first-hand.”

In March 2020, Polar Latitudes will run its second expedition to study humpback whales, in partnership with the Woods Hole Oceanographic Institution. Alongside marine biologists, environmental scientists, geologists and historians, citizen scientists tag whales and study their behavior.

Why it's interesting:

The mark of luxury travel is shifting away from material and creature comforts. Scientific pursuits are becoming the ultimate status symbol for an emerging echelon of elite adventurers prioritizing purpose-driven travel.



Slow travel

A wave of mindful travel sees travelers luxuriating in the journey rather than rushing to their destination.

Echoing modern mental-health mantras, travelers are embracing a longer journey as an opportunity to savor the moment. The journey, once simply a means to an end, is being relished as much as the final destination. And with growing awareness of the negative environmental impact of air and auto travel, train travel is experiencing a sweeping resurgence.

Climate activist Greta Thunberg famously renounces air travel, instead commuting around Europe exclusively by train. Now, as the flight-shaming movement gains momentum, global tastemakers are piping up in support of the romanticized train trip.

Supermodel Edie Campbell opted for a 12-hour train trip from London to Milan for fashion week in fall 2019 instead of flying. In an October 2019 article she wrote for *Elle* addressing the fashion industry's carbon footprint, Campbell described her trip as “heaven... I was gently rocked in my comfortable seat, while gliding past glittering lakes and mountain passes, and catching glimpses of Italian nonnas hanging out their bloomers.”



In October and November 2019, model and activist Adwoa Aboah took to Instagram to extoll the virtues of rail travel, captioning one carousel post of images taken on board the Belmond British Pullman, “To be chic on a train with my Mumma dearest is already my favorite thing.”

Iconic fashion house Chanel emphasizes the luxury of train travel in its Resort 2020 collection. Rather than sending models down a traditional runway, the collection debuted against a recreated beaux arts-style train station. The marketing campaign that followed brought to life the elegance of the modern train journey, evoking “the promise of an adventure,” the brand explains.

“Luxury travel, so we are told, is life in the fast lane; private jets and champagne at 40,000 feet,” Campbell wrote. But this definition of luxury is outdated, she argued, instead declaring that “luxury is taking your time, and moving more slowly.”

Why it's interesting:

Train travel, which harks back to a slower pace of life, is redefining modern luxury travel as consumers hunger for opportunities to step back from the stressors of daily life and engage more deeply with the world around them.





Farm-to-plane dining

Airlines are bringing a crop of garden-fresh ingredients to in-flight menus.

Planes, with their limited storage and postage stamp-sized prep areas, are not conducive to gourmet meals. But as health and wellness remains a top priority for consumers, airlines are making major strides towards offering meals that cater to wellness-obsessed and sustainably minded passengers. The latest feat? Runway-adjacent gardens to fuel flyers with hyper-fresh produce—grown and picked planeside.

As part of its wellness cuisine initiative, Singapore Airlines has launched a menu in collaboration with hydroponic farm company AeroFarms. From October 2019, arugula, baby bok choy and mixed greens grown in AeroFarm's Newark vertical gardening facility have been served as part of the “farm-to-plane” menu on flights from New Jersey's Newark Liberty International Airport to Singapore's Changi Airport.

“Imagine boarding a plane and enjoying a salad harvested as close to departure as possible—literally the world's freshest airline food,” says Antony McNeil,



**Imagine boarding a plane
and enjoying a salad
harvested as close to
departure as possible—
literally the world's
freshest airline food.**

**Antony McNeil, global food and beverage director,
Singapore Airlines**



global food and beverage director for Singapore Airlines. “The only way to get fresher greens is to pick them from your own garden.”

Silicon Valley food startup Crop One is bringing fresh produce to flyers on a mass scale. The hydroponic farming company partnered with Emirates Flight Catering to construct the world’s largest vertical farm in Dubai. From December 2019, produce harvested from the facility began making its way onto in-flight menus out of Dubai, which ranked as the world’s busiest airport for international passengers in 2017 and 2018 (the most recent numbers available at the time of writing).

Chicago’s O’Hare International Airport has been a pioneer in hydroponic produce since 2011, when a vertical garden was planted in one of the airport’s terminals. Vegetables from the garden are sourced directly to restaurants and cafes in the terminal, offering diners fresh produce year-round for pre-flight meals.

Why it’s interesting:

These new initiatives are taking freshly picked produce to the skies, enabling travelers to eat just as well in the air as they would on the ground.



Legacy preservation

Travelers and companies are becoming far more conscious of how tourism can threaten the future of heritage landmarks and cultural traditions.

Overtourism has become a buzzword—the *Oxford English Dictionary* made the term one of its words of the year in 2018. Now destinations and companies are fighting back, both in terms of mitigating current overtourism levels and offering tours and activities that positively impact landmarks and local communities.

Alongside moves such as Venice introducing a €10 (\$11) fee to enter the city for short stays and Amsterdam removing the I Amsterdam sign that attracted hordes of Instagrammers (see gated tourism, page 57), steps are being taken that aim to include tourists in a destination’s preservation. Mark Tanzer, chief executive of the Association of British Travel Agents, says that “tourism brings with it considerable benefits that the industry should rightly be proud of. Economies and people depend on tourism, it protects and promotes cultural exchange and can support the preservation of natural environments and cultural heritage.”

In tune with the move to conserve, in October 2019 Airbnb in China launched a campaign called Lost & Found. An article on *Marketing Interactive* explained



that this aims to “preserve China’s heritage sites as masters hailing from traditional industries face an increasing loss of awareness and recognition for their craft.” Airbnb’s Chinese platform offers travelers the chance to learn Chinese crafts and traditions from 40 masters, as part of its traveling experiences. Mia Chen, head of marketing at Airbnb China, told the publication “we want to inspire a combination of travel and participation in cultural heritage experiences,” adding that the platform seeks to encourage the younger generation to explore, care for and value the treasures of China’s traditions.

In another initiative, Airbnb sponsored a project called the Italian Sabbatical, in which selected visitors became temporary members of the southern Italian village of Grottole. The aim, the company states, was to “revitalize a village that is at risk of disappearing” as its population ages and younger people move away. Out of 280,000 applicants, five were selected to live in the village for three months, where they volunteered with Wonder Grottole, which was rehabilitating Grottole’s historic center. Wonder Grottole’s site says that the project, experimented “with a new tourism model.” The traveler, it explains, doesn’t visit passively, or just enjoy the experiences offered by locals, but becomes a participant in change.

Illustrating the strength of sentiment behind preserving cultural landmarks, there has been heated debate in France over the restoration of Notre Dame cathedral after it was extensively damaged in a fire in 2019. According to data from Odoxa-Dentsu published in *Le Figaro* in May 2019, 55% of French citizens believe its landmark spire should be rebuilt identically. French president Emmanuel Macron, however, is pushing for a “contemporary architectural gesture” to replace it and the French government has invited architects to submit proposals for the roofline. This, the *Guardian* reported, resulted in a Twitter hashtag #TouchePasANotreDame (don’t touch Notre Dame). General



Jean-Louis Georgelin, the army general overseeing the Notre Dame restoration, has said that a final decision on the spire’s design will be reached in 2021.

Why it’s interesting:

Travelers and brands can no longer ignore the cultural and environmental impact that traveling has on heritage destinations and local culture—and the importance of this heritage to locals and travelers alike. These initiatives are taking proactive steps to preserve heritage and aim to bring a sense of altruism to the tourism trail, and some experiences dovetail with young consumers’ desire to do good while seeing more of the world. Expect more travel experiences that take a 360-degree view of how they impact a destination.



Social stays

Solo travel is on the rise—and hotels are investing in providing ready-made entertainment for lone guests.

More and more travelers are choosing to go it alone; a survey by the Association of British Travel Agents found that 15% chose to vacation by themselves in 2018, up 12% compared to the previous year. Hotels are catering to these solo visitors by transforming themselves into social and cultural hubs.

Among the venues experimenting in this sphere is the Stratford, a hotel and loft apartment development that opened in spring 2019 in east London. Its Happenings program is intended to bring “lifestyle, fashion, wellness, art, culture and entertainment to Stratford,” the hotel says. Among its events in 2019 were life drawing classes with artist Alexandria Coe, cocktail masterclasses and doga—yoga for dogs and their owners.

In January 2019, *Skift* published an article on luxury hotels’ desire to “make you feel culturally relevant.” Among those it cited were Heckfield Place in Hampshire, England, which opened in late 2018. This restored Georgian house’s Assembly Events program has spanned tours of its art collection with a curator, a talk on recovery by Russell Brand, and a “mud and guts” outdoor experience



for children. “The inspiration behind the Assembly really came from our owner,” Olivia Richli, general manager of Heckfield Place, told *Skift*. “He’s an academic and very keen that you take away more than a luxury hotel experience, that you leave with something you learned.”

This follows on from Moxy Hotels’ established social programs, which have included knitting classes in its Times Square hotel and a collaboration in 2018 with networking and dating app Bumble—as part of this, Moxy’s hotels were verified as “inclusive environments to meet your Bumble connections, across dating, friendship and professional networking.”



The Life House hotel chain has an app that allows guests to connect with each other during their stay. “The travel industry has a unique opportunity to match new people with other people,” Rami Zeidan, CEO and cofounder of Life House, tells Wunderman Thompson Intelligence. “Everyone is traveling and doesn’t necessarily have a home base or safety network of friends in a given location. Hotels have a particularly unique opportunity to connect people.”

Why it’s interesting:

In the face of competition from the likes of Airbnb, hotels are pitching themselves as more than merely a place to stay. Expect to see more hotels launching social and cultural events to engage travelers and locals alike, to cement their status as a powerful hub for visitors and the community.



Elevated airports

Airports are getting an experiential upgrade, becoming exciting cultural destinations in their own right.

Long lines, bad food and grim terminals are horrors of the past when it comes to new airports. Cities are opening up mega airport spaces which deliver seamless, interactive and even enchanting experiences.

Singapore's Jewel Changi Airport opened in April 2019. The space hosts the tallest indoor waterfall in the world, at 40 meters high, which is fed by rainwater collected on the terminal's huge donut-shaped roof. The atrium is made of glass panels, allowing natural light to shine on visitors as well as on the multistory garden that is home to more than 2,000 trees and 100,000 shrubs. Travelers can take a guided tour to explore the garden as well as shop, eat and drink at the 280-plus outlets in the airport. According to Safdie Architects, the practice that designed the airport, the space was built for travelers and non-travelers alike and devised to be more than a transit hub. The designers intend Jewel Changi Airport to establish "a new model for airports as discrete destinations for shopping, entertainment and social activity."

Beijing's newest airport opened on September 25, 2019. Designed in a starfish pattern that utilizes the principles of movement, Beijing Daxing International





“ ”

Cities are opening up mega airport spaces which deliver seamless, interactive and even enchanting experiences.

” ”

Airport also features the latest technology to speed up the airport process—which will be necessary for the 72 million passengers it aims to service by 2025. The airport, designed by the late Zaha Hadid, is sure to become a landmark worth a visit whether or not you plan to fly.

Saanen Airport in Gstaad, Switzerland, is the location of Tarmak 22 gallery, which in 2019 hosted an exhibition by German artist Andreas Gursky and a selection from the collection of Mexico-born artist Alex Hank. The gallery is open to the public as well as travelers and was created as a space where visitors and locals can view contemporary art shows and enjoy cultural talks and performances. It is a permanent addition to the luxury ski resort’s airport. Antonia Crespí Bennàsar, the gallery’s cofounder, tells Wunderman Thompson Intelligence, “with Tarmak 22, we hope to contribute to a cultural dialogue and make Gstaad an inspiring destination for curious travelers and locals alike.”

Why it’s interesting:

By providing new experiences like these, where visitors can be inspired or entertained, airports are going beyond merely facilitating travel. In expanding their offerings, they are attracting new audiences and becoming unique cultural destinations in their own right.



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Disaster-proof destinations

Forward-thinking architects are designing homes to withstand apocalyptic weather conditions.

With freak weather events becoming the norm, from category five hurricanes to raging wildfires, architects are designing more resilient buildings to withstand an increasingly volatile climate.

Lebron Lackey's home on the coast of Florida gained renown in October 2018 as one of few homes to emerge unscathed amid the devastation wreaked by Hurricane Michael. Lackey reportedly spent twice the normal construction cost to protect his dwelling against 250-mile-an-hour winds and flooding. "We wanted to build it for the big one," Lackey told the *New York Times*. "We just never knew we'd find the big one so fast."

Architects are turning to maritime construction techniques that stand up to heavy rain, flooding and coastal storms. Completed in 2018, Raad Studio's Beach House in New Jersey is designed to counteract the seaside home's vulnerability to storms and flooding. "We created a set of hydrodynamic dunes with penetrations that allow water to sluice through the land, while simultaneously elevating the house well above the historic high-water mark,"

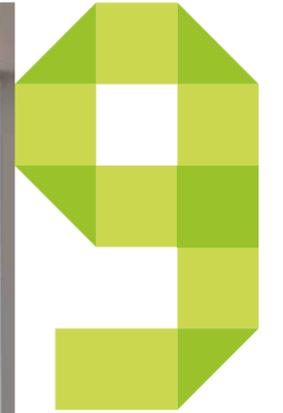




the firm explains. A trough-like path bracketed by concrete retaining walls runs underneath the home and serves as a storm drain during heavy rainfall, creating a building that James Ramsey, designer and director of Raad Studio, describes as “in sync with the land and water in a way that allows it to survive.”

An oceanside home constructed by Specht Architects on Long Beach Island, New Jersey, which was hit hard by Hurricane Sandy in 2012, takes its cue from nautical construction with the highest grade hurricane-proof windows, stainless steel components and a fiberglass roof to withstand heavy weather.

Bruce Beinfield of Beinfield Architecture has constructed a fortress on the coast of Connecticut. The house features several components that were specifically



engineered to protect it from extreme weather conditions. Salvaged wood sidings and roll-down steel shutters create an “exoskeleton of lateral-bracing shield storm shutters that protect the large operable glazed surfaces from storms,” the firm explains. The house is raised on concrete pillars 15 feet above sea level—two feet higher than the Federal Emergency Management Agency’s flood regulations require. The ground-level garage is constructed on a base of reinforced concrete, with vents where flood water can enter and equalize water pressure.

Why it’s interesting:

As climate concerns mount, the next generation of luxury homes is being built to provide heightened protection from extreme conditions.



WELL hospitality

The next generation of hotels is taking healthy hospitality to new heights, building health-enhancing elements into their very structures.

According to the most recent data from the Global Wellness Institute, in 2017 wellness tourism accounted for \$639 billion of the global wellness economy. Pioneering hotels are working to capture a share of the market by constructing environments specifically formulated to optimize wellbeing.

In July 2019, the Inn at Moonlight Beach in Encinitas, California, became the world's first hotel to earn a WELL building certification. Introduced in 2014, the International WELL Building Institute exists "to improve human health and wellbeing in buildings and communities," and "enhance people's health and wellness through the buildings where we live, work, and play." There are some 3,880 projects applying WELL standards across 58 countries, the majority of which are workplaces.

To meet the certification's standards, the Inn at Moonlight Beach reviewed its buildings and offerings to align with standards from WELL's seven categories—air, water, nourishment, light, fitness, comfort and mind. The inn's features

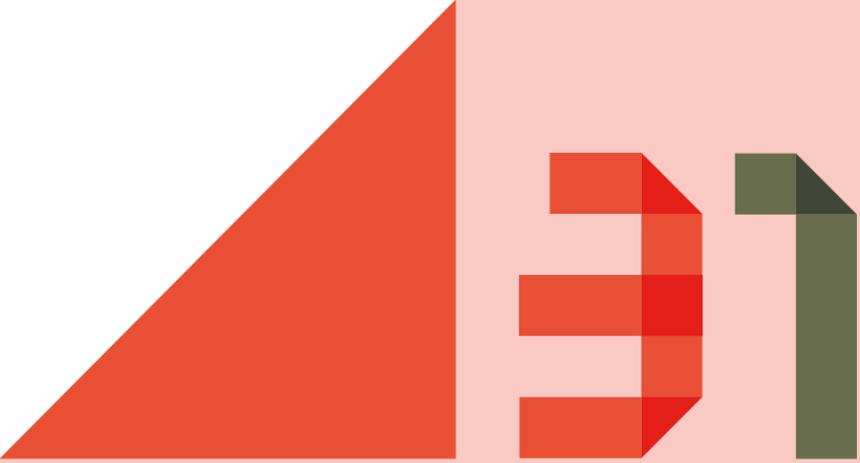


include a biodynamic farm, a meditation garden and a top-of-the-line air filtration system.

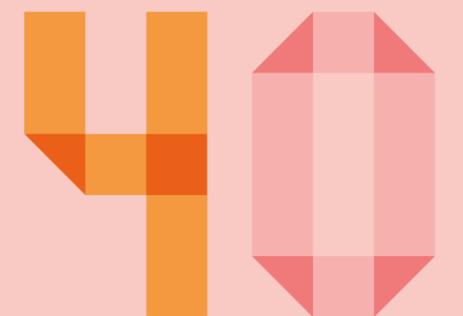
While the Inn at Moonlight Beach is the first hotel to be WELL certified, several others are also pursuing the certification, including the Keihan Kyoto hotel in Japan, the Zem Wellness Retreat in Alicante, Spain, and California's Stanly Ranch.

Why it's interesting:

Wellness-obsessed vacationers are seeking out new ways to supercharge their rest and relaxation—and are starting to look beyond activities alone to achieve this, choosing carefully considered environments built on a foundation of health and wellness.



Brands & Marketing





Gamefluencers

GlobalData predicts that the gaming industry will be worth \$300 billion by 2025, and brands want a slice of that multibillion cake.

Apple Arcade launched in September 2019, upping standards and accessibility for mobile gaming, and Google is also attempting to change the way games are accessed with the launch of Stadia in November 2019.

As the gaming universe diversifies and the uptick in users continues, brands are turning to gaming influencers to engage with this growing audience. In August 2019, *Fortnite* megastar Tyler Blevins, better known as Ninja, entered a multiyear partnership with Adidas. Earlier in 2019 in China, Nike signed a deal to become the official and exclusive apparel and footwear partner for *League of Legends Pro League (LPL)* players, and the company even tapped *LPL* player Uzi (real name Jian Zhao) to appear in one of its campaigns. In 2018, K-Swiss sponsored footwear for the esports team Immortals.

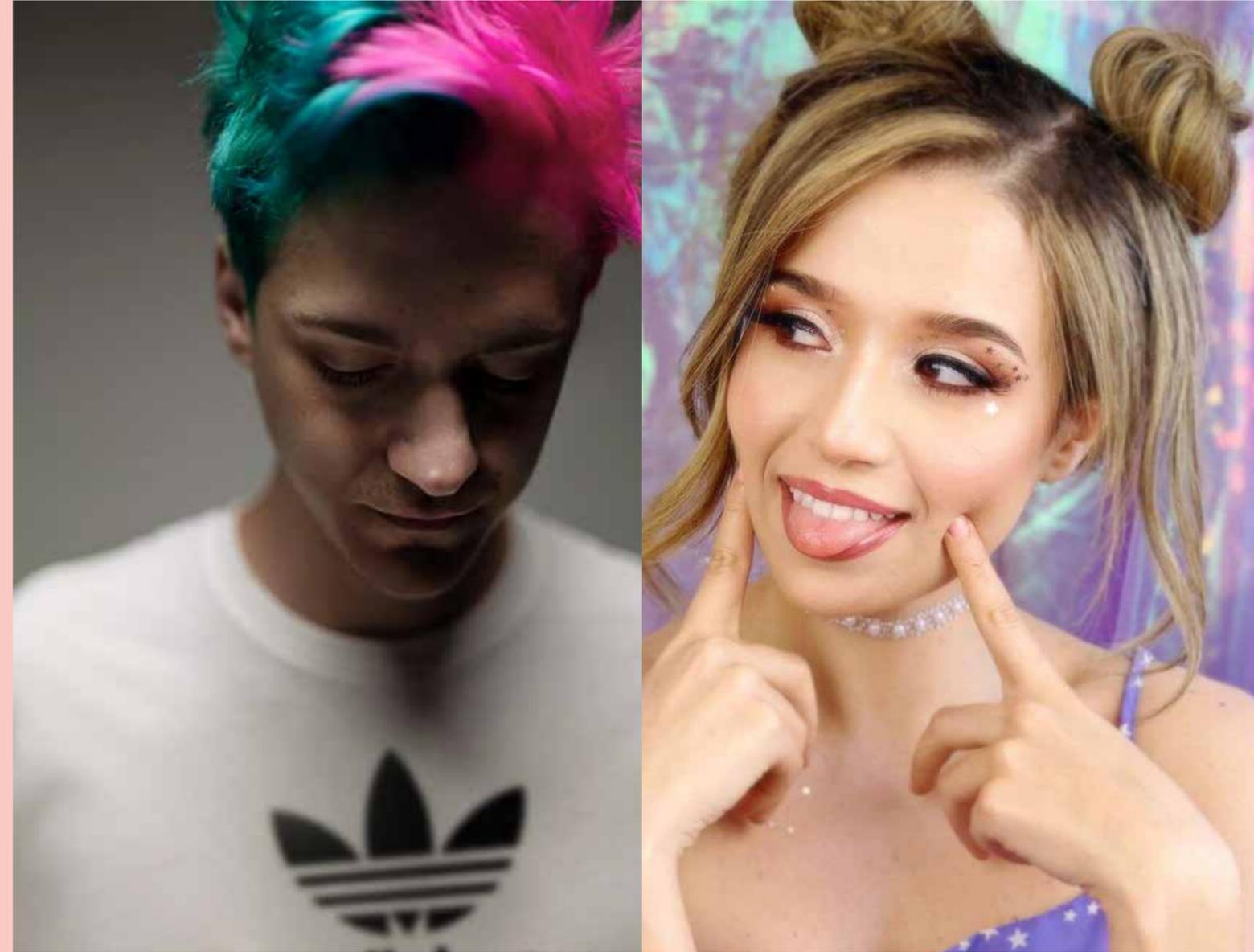
Beauty brands are collaborating with female gamers. In March 2019, *Fortnite* and *League of Legends* streamer Pokimane (real name Imane Anys) released an





eyeshadow palette in collaboration with makeup brand Winky Lux. In February 2019, Mac Cosmetics partnered with Tencent mobile game *Honor of Kings* in China to launch a limited edition of lipsticks, which reportedly sold out within 24 hours.

Louis Vuitton has also been spotting in-game brand opportunities. The luxury brand partnered with Riot Games in September 2019 and is offering two unique “prestige skins” for *League of Legends* champions. These are designed by Nicolas Ghesquière, artistic director of Louis Vuitton’s women’s collections. The Qiyana skin dropped in November 2019 and the Senna skin’s release is expected in early 2020.



Why it's interesting:

Gaming is shaping up to become the next frontier for brand activations—and esports stars are becoming the newest class of celebrities. “Brands have historically been cautious when approaching gaming as it’s somewhat unknown. However, the scale at which talent is building audience—particularly mobile gamers—simply can’t be ignored now,” says Charlie Baillie, cofounder of esports media company Ampverse.



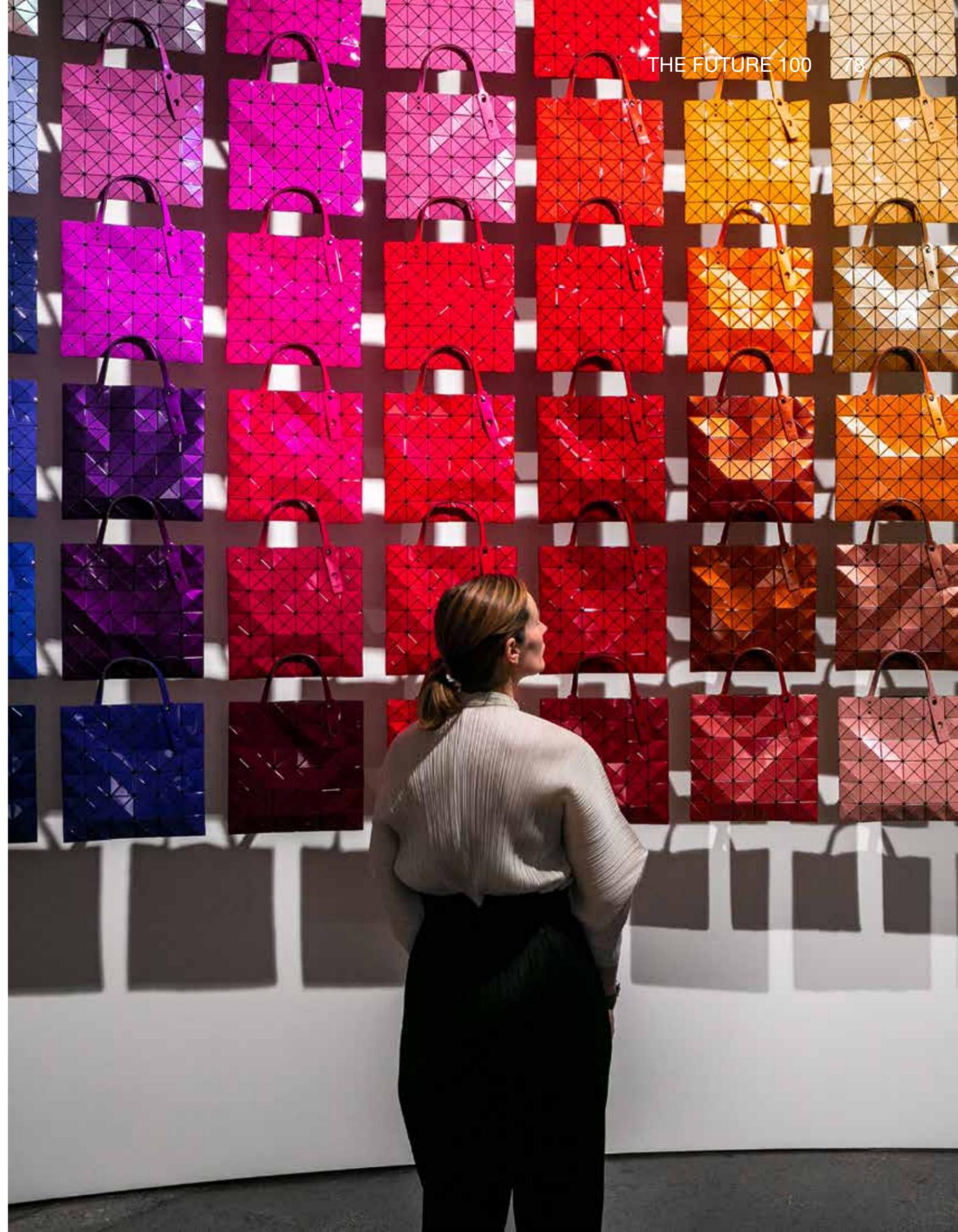
Sonic branding

From finance to fashion, companies across industries are creating bespoke sounds to reinforce their brand identities and forge multidimensional connections with today's consumers.

As noted in the sound empires trend report in “The Future 100: 2019,” ears have become a key gateway to audiences, thanks to the rise of audio entertainment and an abundance of sound systems—and brands are starting to take note.

In September 2019, Coach published a series of Instagram posts requesting that viewers put the sound on, and highlighted noises associated with Coach, from the “always satisfying sound” of its Turnlock bag fastenings to the clink of its metal buttons and the whirr of a sewing machine stitching one of the brand’s pieces. In the same month, Bao Bao Issey Miyake invited London Design Festival attendees to visit Bao Bao Voice, an “interactive, multisensory event” that included more than 100 sounds attached to its renowned geometric bags.

In the auto world, audio innovation is unsilencing electric cars, which have raised safety concerns for being too quiet. The European Union (EU) is already





rolling out rules to equip electric cars with sound for new models, and from July 2021 all cars in the EU must have an acoustic vehicle alert system. BMW has decided to up its game by rejecting the traditional sound of a car engine and tapping composer Hans Zimmer and sound engineer Renzo Vitale to create audio cues for its BMW Vision M Next electric car. The partnership was announced in June 2019 and Zimmer and Vitale have developed the BMW IconicSounds Electric series of sounds. The brand says that its aim is to address the “gap in the emotionality of the driving experience” when driving a nearly inaudible electric car.

In early 2019, both HSBC and Mastercard unveiled new sound identities. HSBC worked with composer Jean-Michel Jarre to create “a bespoke piece of music that will help people instantly recognize the bank.” Mastercard devised a sonic logo and ensured the originality of the melody by hiring musicologists to compare it with a database of music.

In June 2019, US music platform *Pandora* launched an audio consultancy called Studio Resonate, which, according to *Businesswire*, will help “propel brands into the new era of audio.” In the same month iHeartMedia and WPP announced Project Listen, a new content and research service providing sonic branding.

Audio branding services are being ramped up as a result of the reinvigorated need for bespoke sounds. “Consumers are listening more than ever and we already know the power of music, voice and sound to create engaging and emotional human connections,” says Mark Read, CEO of WPP. “As consumers’ behavior evolves, from the media they enjoy to how they relate to brands and make purchase decisions, it’s essential to have a modern approach to creative and strategy for all media, including audio.”



Why it's interesting:

Companies are tapping into the science of sound to strengthen brand identities and better resonate with consumers. Sound, after all, is our fastest sense; according to auditory neuroscientist Seth Horowitz it takes our brains at least one quarter of a second to process visual recognition but only 0.05 seconds when it comes to sound. Brands seeking to leave a long-lasting, emotional impression on consumers should look to trademarked audio identities.



Singles lexicon

Call them self-partnered, or consciously uncoupled, or sologamists—but don't call them single.

A new vocabulary is emerging to describe the myriad, multifaceted ways to live without a partner, reframing tired stereotypes and stigmas.

Gwyneth Paltrow and Chris Martin made headlines for their “conscious uncoupling” in 2014. The neologism opened the door for a new way of talking and thinking about life without a partner, and now culture is starting to catch up.

In an interview with British *Vogue* for its December 2019 issue, actor Emma Watson described her lifestyle as “self-partnered.” The term, like that of Paltrow and Martin, set off a media maelstrom. Amidst the frenzy, one thing was made abundantly clear: traditional vocabulary about single lifestyles no longer applies.

“When Emma Watson and Gwyneth Paltrow come out and use phrases like ‘self-partnered’ and ‘conscious uncoupling,’ it challenges the psychological implications and narratives behind the phrases being ‘single’ and ‘getting a divorce,’” therapist Travis McNulty told NBC News.

These high-profile women join the ranks of a growing, empowered group embracing singlehood for the fulfillment and freedom it provides. Author Glynnis



MacNicol, who in 2018 published *No One Tells You This*, a memoir on singledom, tells Wunderman Thompson Intelligence that she sought to “add some new language to the story around women’s lives.”

She says that “we don’t really have a way of talking about women’s lives outside of marriage or babies.” But, as she expands, “that’s what’s happening now: we’re creating a new language around women’s lives. It’s happening in fits and starts. Sometimes it looks good and sometimes it’s: wow, they did a really bad job with this. It’s messy, it’s hard and it’s new.”

In our report “The Single Age,” interviewee Joe Staton tells Wunderman Thompson Intelligence that if brands were to address him as a single person “they would be immediately off my consideration list. I would find it quite

Culture of late is experiencing a push to reframe single people as they really are: confident, fulfilled and empowered.

patronizing, I think. I don’t think it would resonate with me. Although I am very happy being single, my typology is not singledom.”

As this discourse widens, traditional tropes of singlehood in the media are changing, shedding the portrait of immature, pitiable desperation and trading it for one of independent freedom. According to findings from a survey of 3,000 respondents across the United States, the United Kingdom and China commissioned by SONAR™, Wunderman Thompson’s proprietary research tool, 82% of American singles think that it’s becoming more acceptable to be single in today’s society and 77% think society places too much emphasis on being in a relationship. The majority of respondents—regardless of age, gender or nationality—say that they love being single, with upwards of 70% saying single is their choice. Across generations, more than 50% of Americans prefer being single to being in a relationship.

Why it’s interesting:

Culture of late is experiencing a push to reframe single people as they really are: confident, fulfilled and empowered. The evolving dialogue reflects a fundamental and seismic paradigm shift to adulthood uncoupled. Armed with a more nuanced and accurate arsenal of terminology, society is able to meet this growing cohort as they are.



The new super-creatives

Digital tools are enhancing the creative habits of the next generation of consumers—and giving them a powerful voice.

Generation Z, the cohort aged 13 to 22, is the first generation that will grow up surrounded by tech. The group's digital capabilities and hyper-connectivity have equipped its members with an unmatched fluidity in creative expression. This super-creativity is being used for the greater good; in "Into Z Future," a report from the Innovation Group in partnership with Snapchat, when asked to offer a slogan for their generation, gen Zers first say "be yourself," followed quickly by "save the planet."

In November 2019, the women behind the Gen Z Girl Gang community—cofounded by outspoken advocate for women's reproductive rights Deja Foxx, now 19—partnered with Samsung to present the "College Access for All" campaign as part of Samsung's Galaxy Innovator Sessions. They used their platform to discuss inclusivity in education and a new mentorship opportunity, and collaborated with tween-focused wellness brand Blume for a self-care workshop.

Other prominent gen Z creatives include indigenous rights activist and poet Kinsale Hueston, who recently worked with *Refinery29* and Target on a





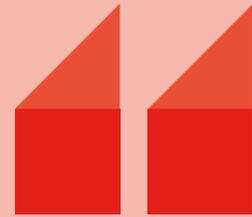
campaign called “Future Seekers”; Matt Bernstein, who uses makeup as a storytelling device to speak out on LGBTQ rights; and 19-year-old Em Odesser, who was listed in *Teen Vogue*’s 21 under 21 in 2019 for the way she uses her creative talents to break down stigma around mental and sexual health for young people.

“I don’t know if I want to be a journalist, a dildo slinger, a novelist, a magazine editor, a comedian, a stylist, or what,” she told *Teen Vogue*. “But I hope I’m still expressing myself in a way that feels authentic.”

Why it’s interesting:

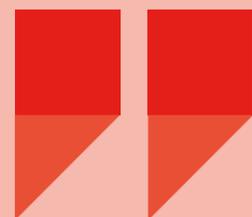
Teens are charting new territory for digital and artistic expression. Many are doing so with an activist streak at various scales, and brands looking to reach this generation need to communicate on their level. “You have to completely remove any sense of binaries or rules—there are no contradictions for gen Z, it’s just all raw material,” Molly Logan, cofounder of gen-Z run think tank Irregular Labs, tells Wunderman Thompson Intelligence in the “Into Z Future” report. The companies that succeed with these young consumers will be those that align their activities with what gen Zers care about, from authenticity and inclusivity to the environment.

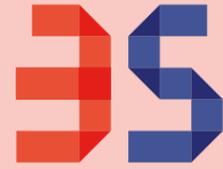




You have to completely remove any sense of binaries or rules—there are no contradictions for gen Z, it's just all raw material.

Molly Logan, founder, Irregular Labs





Analog renaissance

Cultural creators are turning to analog formats to cut through the digital noise.

A growing number of artists are reviving analog formats that had seemed consigned to the media dustbin.

In June 2019, Radiohead frontman Thom Yorke teased the launch of his album *Anima Technologies* with a series of mysterious ads placed on London Underground trains, in Italian phone booths and in the classified section of the *Dallas Observer*.

The ads also offered a telephone number which, when dialled, played the cryptic message “*Anima Technologies* has been ordered by the authorities to cease and desist from undertaking its advertised business.”

Coldplay also chose the analog route for their eighth studio album release, promoting the launch with a series of small ads placed in the classified section of a selection of newspapers. In the *North Wales Daily Post*, the advert for *Everyday Life* reportedly appeared alongside sales notices for hay bales and a fridge freezer.



The band also took the opportunity to revive a much-loved tradition, sending seemingly personally typed postcards to selected fans via snail mail.

Completing the analog-fest, the album has been released on humble cassette, too, which is itself seeing a nascent revival as a format. Cassette Store Day, an annual event dedicated to the format, originated in the United Kingdom in 2013 but is now thriving across the world in China, Indonesia, the United States and Canada among others.

In the United Kingdom, sales of cassette tapes are at their highest since 2004; according to a November 2019 *Guardian* article, the number of tapes bought



In the digital age, analog formats offer novelty with a helping of nostalgia, and even anemoia—nostalgia for a time you have never known.



that year were predicted to reach 100,000. In the United States, sales were up 23% in 2018, amounting to 219,000 tapes sold. Artists such as the 1975, Madonna, and Catfish and the Bottlemen are all driving this surge with their own cassette launches.

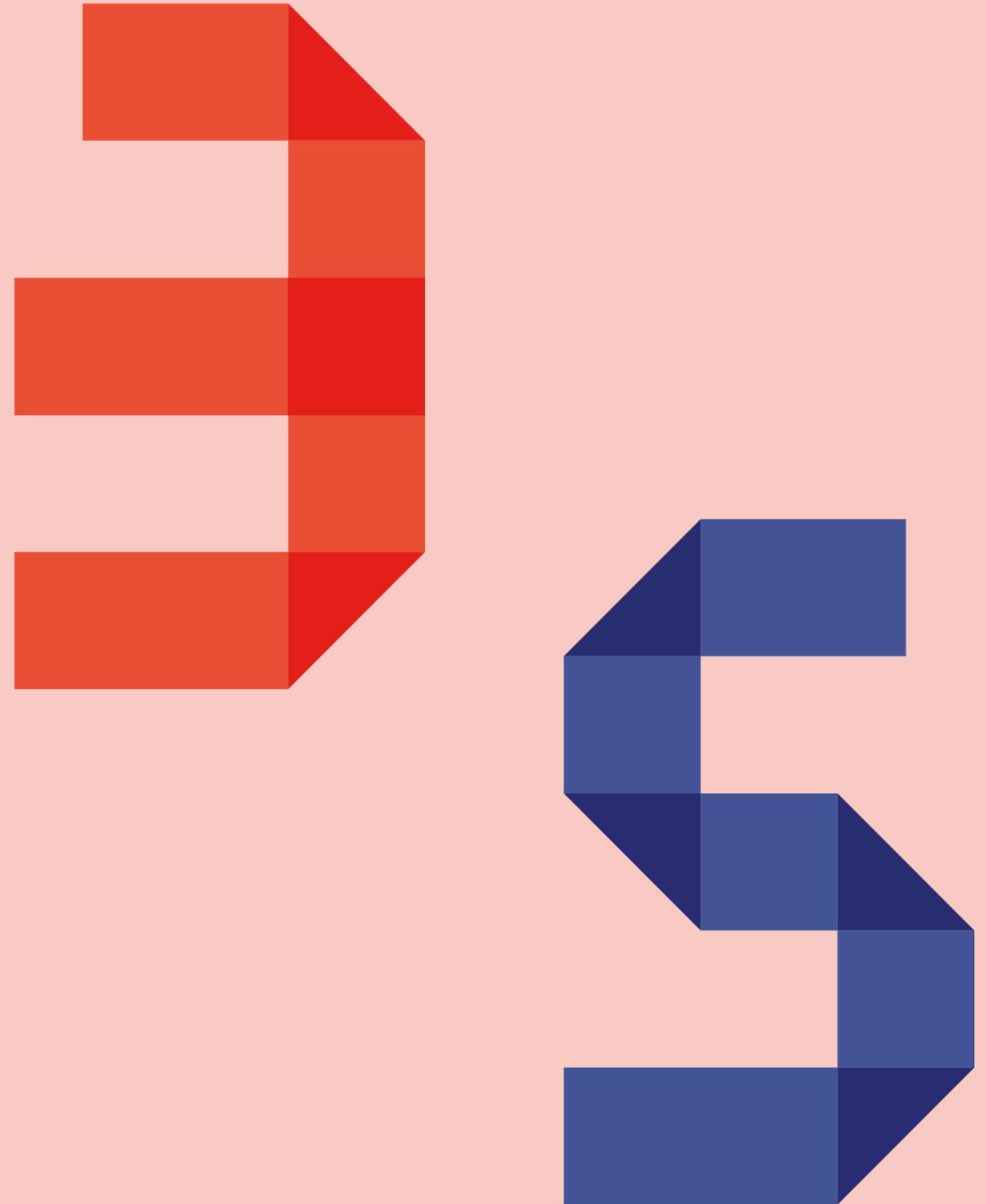
Teen singer Billie Eilish, who was not even born when cassettes were in their heyday, released her debut album *When We All Fall Asleep, Where Do We Go?* on a limited-edition lime green cassette, including a UV glow-in-the-dark version.

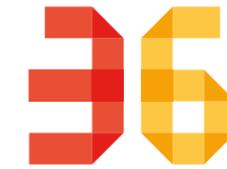
The latter perhaps nods to collectability and Instagrammability rather than any serious dedication to the format. But nostalgia plays a role in cassette sales as many music fans hark back to the distinctive sounds of their youth.

Gennaro Castaldo of the BPI British recorded music trade association attributes the shift to the “element of nostalgia.” He adds that the “*Guardians of the Galaxy*” film franchise, which features the cassette as part of its storyline, has also helped to reawaken interest in the format over the past few years.”

Why it's interesting:

In the digital age, analog formats offer novelty with a helping of nostalgia, and even anemoia—nostalgia for a time you have never known.





Unbiased interfaces

The ever-present issue of gender bias has infiltrated everything from the media to algorithms in recent years.

A prime example is the furor in fall 2019 over the Apple credit card, which customers reported was offering women lower credit limits than men. While card issuer Goldman Sachs said its algorithm “doesn’t even use gender as an input,” *Wired* pointed out that “a gender-blind algorithm could end up biased against women as long as it’s drawing on any input or inputs that happen to correlate with gender,” adding that studies had shown “creditworthiness can be predicted by something as simple as whether you use a Mac or a PC. But other variables, such as home address, can serve as a proxy for race. Similarly, where a person shops might conceivably overlap with information about their gender.”

With this in mind, companies are thinking up inventive ways to weave gender neutrality into their interfaces.

In May 2019, Vice Media’s creative agency Virtue launched Q, the first genderless voice assistant. Virtue says that Q “is an example of what we hope the future holds; a future of ideas, inclusion, positions, and diverse representation in technology.” It points out that “technology companies often

choose to gender technology believing it will make people more comfortable adopting it. Unfortunately, this reinforces a binary perception of gender, and perpetuates stereotypes that many have fought hard to progress.”

Virtue has asked people to share the innovation, so that Apple, Amazon, Google, and Microsoft implement it in their voice assistant products.

Ben Fisher, the founder and CEO of MagicCo, a company that deploys brands onto connected home interfaces, including voice assistants, tells Wunderman Thompson Intelligence he believes that “in the future consumers will be able to select a variety of voice options on these assistants, and genderless voice assistants will be one of many options. I think having a genderless option will impact a company’s sales, especially if consumers make their preference for this option known.”

Fisher adds: “I think it is unfortunate that the first home voice assistants defaulted to female-sounding voices. I imagine this is because so many decision-makers in tech are men. But I think, in the long term, there will be options for different people. The voice assistants are merely platforms for software that can be configured, and they will be.”

Fisher notes, however, that there is a degree of uncertainty over what exactly a genderless voice sounds like. He says it is “hard to truly get right and it may take time to figure that out.” With the service currently offering voices that can be altered and configured, Fisher says that this “will make the technology feel accepted and trusted by the user.”

The concept of redressing gender balance is coming to search engines too. In April 2019, Procter & Gamble brand Pantene launched SHE (Search, Human,



Equalizer) to “shine a light on bias in search.” The search tool, P&G states, “operates on the search back end by filtering results to produce less biased and more balanced results, ultimately giving the women behind some of the world’s greatest accomplishments and transformations the visibility they deserve.” The launch chimed with Pantene’s “Power to Transform” campaign, which saw the haircare brand spotlight how women are “transforming the world.” It also marked the launch of a \$1 million Pantene partnership with women’s member’s club The Wing, to help fund female entrepreneurs and women-led businesses through a pitch investment competition.

Why it’s interesting:

Rather than simply paying lip service to gender inequality and bias, brands are trying to innovate with products that actively strive to address these issues. From taking on a gender-neutral identity to actively promoting women’s achievements, these innovations could be a signal of change for tech’s reputation for gender bias.



Original content economy

As the streaming wars heat up, brands are increasingly investing in original content.

Viewing habits are shifting. According to an August 2019 report from YPulse, “millennial parents are raising their kids without cable. Their kids are more likely to watch streaming services than anything else—shaping a future where cable is seen as a rare exception.” The report found that only 33% of US 13-18-year-olds surveyed watched content on a TV set weekly, while 73% said they watched video content on their smartphones, and a mere 18% watched cable weekly or more.

In this climate of on-demand viewership, entertainment brands are under pressure to deliver unique offerings—and are turning to original content to differentiate themselves from competitors.

Apple TV+ debuted in November 2019 with a slate of exclusive shows, movies and documentaries, including an Emily Dickinson biopic starring Hailee Steinfeld and a mental health docuseries collaboration between Oprah and Prince Harry.





OTT video revenue in the United States will grow at a rate of 10.3 per cent to reach \$23.7 billion in 2023.

PwC

Disney+ hit screens 12 days later with a roster of new launches including *The Mandalorian*, a new show set in the Star Wars universe, and a lineup of scripted and docuseries expanding the Marvel franchise. Further highlighting the growing importance of original content, Disney announced a newly created VP of international content role at the end of November 2019, which is dedicated to the development and production of global original content.

NBC Universal's streaming service Peacock will launch in April 2020. The company said in September 2019 that it offers "a world-class slate of originals" alongside favorites from the NBC vaults. And WarnerMedia's HBO Max, launching in May 2020, has signed movie production deals with Reese Witherspoon and Greg Berlanti.

Brands outside the entertainment industry are also looking to capture consumers' attention with original content. In September 2019, Procter & Gamble premiered *Activate*, a six-part documentary series created in partnership with *National Geographic* and focused on inspiring global activism. "It's not product placement. It's not sponsored content. It's prestige television," wrote *Fast Company*.

In October 2019, dating app Tinder released the original interactive video series "Swipe Night," offering a new way to connect on the app. In June 2019, email marketing platform Mailchimp unveiled Mailchimp Presents, a new entertainment division creating original series, films and podcasts for entrepreneurs and owners of small businesses. In April 2019, home rental

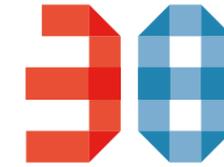


platform Airbnb announced its plans to develop original shows and content that would promote Airbnb hosts, guests and travel destinations. And in January 2019, e-commerce platform Shopify expanded into TV and film production with Shopify Studios, which will develop docuseries and feature-length documentaries geared towards entrepreneurs.

A PwC report has forecasted that OTT video revenue in the United States will grow at a rate of 10.3% to reach \$23.7 billion in 2023, and the importance of original content shows no indication of lessening. PwC noted that “exclusive and original commissions have proven to be the crucial determinant in the battle to attract subscribers to streaming services. The level of content spend being poured into the market by both new and existing players is prodigious and shows no signs of lessening any time soon.”

Why it's interesting:

Branded original content is becoming a key pillar in a fracturing entertainment industry—as well as a novel way for brands to capture the attention of consumers who are looking beyond linear television formats for entertainment.



Climate-positive brands

Pioneering brands are yoking sustainability to their business models, putting their money where their mouths are.

According to Wunderman Thompson Intelligence's SONAR™ research, 90% of consumers believe that companies and brands have a responsibility to take care of the planet and its people. As climate concerns reach fever pitch, brands are assuming greater responsibility for environmental impact.

“More and more, we’re seeing brands and retailers really focus on sustainability as a business priority,” Lizzie Willett, retail consultant at BJSS, tells Wunderman Thompson Intelligence. Brands need to move beyond “clever advertising campaigns,” Willett says. “Consumers can see through it. It’s not just about marketing and advertising, it’s about your whole company ethos and how you really bring that through in your products.”

In November 2019, Dame became the first climate-positive period brand. Its new carbon offsetting initiative dovetails with the brand's founding ethos to cut down on single-use plastic with its reusable tampon applicators. Dame's new initiative—which will remove twice as much carbon from the atmosphere as it has generated since it launched in 2018—earned it the UK's first Carbon Neutral Plus Product certification from Carbon Footprint.





We are entering a new decade of corporate accountability. As businesses, we all have a responsibility to meet the reality of our global climate and biodiversity crises head on.

Marco Bizzarri, CEO, Gucci



“As a business, we have a huge responsibility to do everything we can to help tackle our climate emergency and give consumers better options,” Dame cofounder Celia Pool told the *Evening Standard*. “To us, becoming climate positive wasn’t a choice, but an absolute necessity.”

Mass market brands are also responding to this necessity. Since 2017, H&M has been working towards its aim of becoming carbon neutral by 2040, while Unilever has pledged to be carbon positive by 2030, eliminating all fossil fuels from its production processes and supporting its supply partners in doing the same.

In September 2019, Ikea announced plans to generate an excess of renewable energy for its stores. The homeware company also plans to make solar panels available for sale in all of its markets by 2025, helping consumers achieve carbon neutrality on their own.

“Being climate smart is not an added cost,” Jesper Brodin, chief executive of Ikea’s holding company Ingka, told Reuters. “It’s actually smart business and what the business model of the future will look like.”

Why it’s interesting:

Carbon-positive practices are becoming more than just a trust-building exercise to earn consumer loyalty—they are evolving into a modern business imperative. “We are entering a new decade of corporate accountability,” Gucci CEO Marco Bizzarri wrote in a November 2019 open letter that invited CEOs to join his Carbon Neutral Challenge. “As businesses, we all have a responsibility to meet the reality of our global climate and biodiversity crises head on.” But patience is key: given that sustainability planning requires a timeline of 20 to 30 years to fully implement and scale, brands, consumers and stakeholders alike will need to adopt a long-term view.



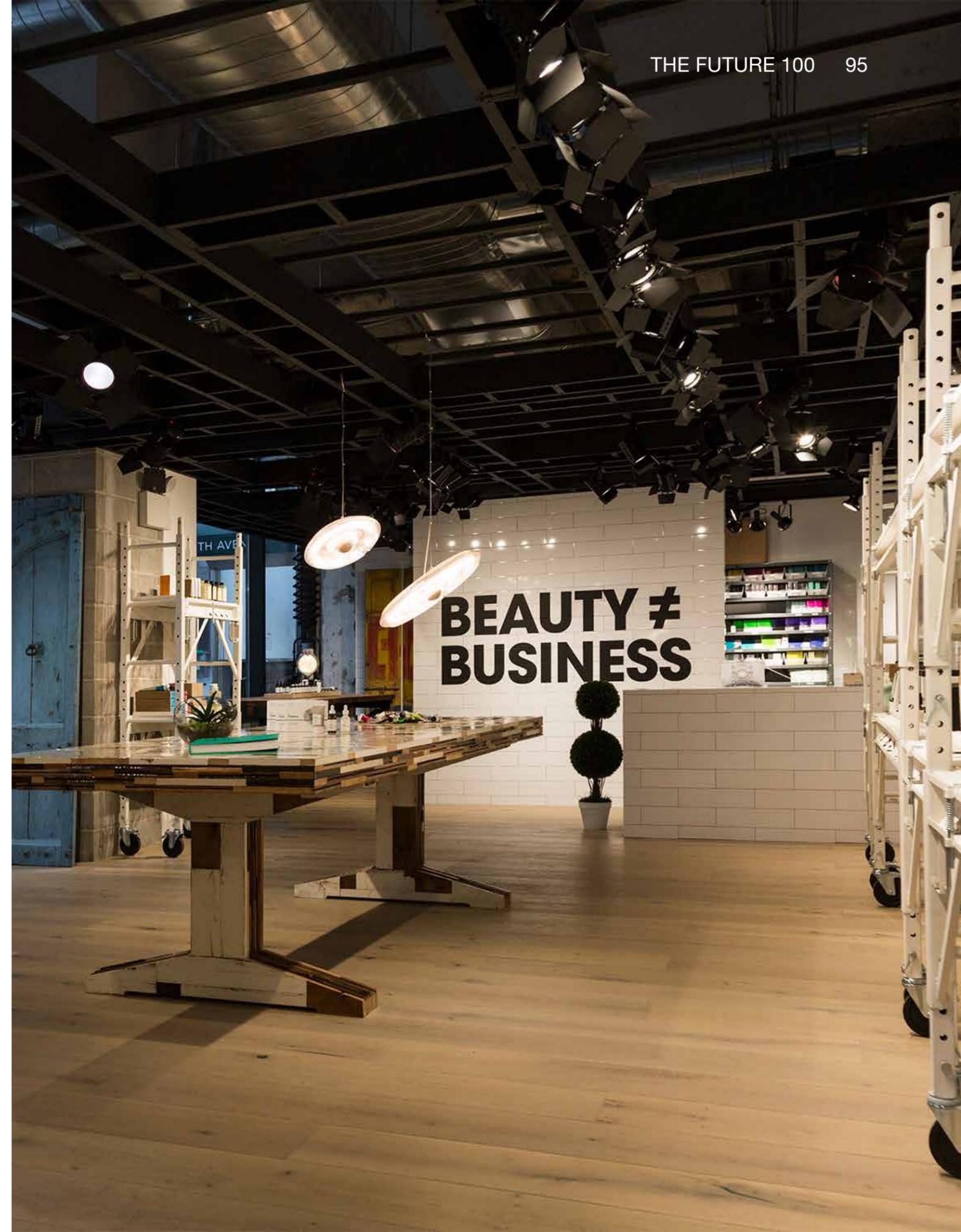
Unconventional brand actions

Can the most counterintuitive brand activations be the most impactful?

Brands that are serious about sustainability are making some unexpected moves to underline their commitment to the cause.

Taking a stance against the excessive consumption of Black Friday, brands including REI and Deciem opted to close their stores on what's become a major US shopping day. Deciem announced that it would shut both its website and retail stores for Black Friday 2019, and states that it “no longer feels comfortable being involved in a single day so heavily centered around hyper-consumerism.” Deciem instead opted to offer a 23% discount off all its products throughout November 2019. “We strongly believe that skincare decisions should be based on education rather than impulse and we want to give our audience the time for research, reflection, and consideration,” the brand says.

In 2019, outdoor clothing brand REI closed its doors for the fifth consecutive year on Black Friday, alongside launching a “cleanup” mission across the United States in the run-up to Thanksgiving, with customers invited to take part in organized cleanups in their neighborhoods. It also launched the Opt to Act Plan, arming consumers with a checklist of actions for all 52 weeks of the year



to help the environment. “As a single company, our impact is limited, but as a community, we can drive change that powers meaningful action beyond our walls,” Eric Artz, CEO of REI, wrote in a memo to members of the brand’s co-op scheme. “As a co-op, we know that many people taking many small steps together can add up to big changes. Collective intention will drive collective impact.”

Patagonia, Lush, Ben & Jerry’s, and Seventh Generation all joined the global climate strikes in 2019 and closed their stores on September 20 that year in solidarity with the climate activists.

“These businesses are rejecting some revenue to bolster a larger cause—climate change—and that’s a potentially radical move,” an article in *Vox* stated, while *AdWeek* wrote that “the closed door represents to consumers that a brand is willing to put their money where their mouth is.”

Harriet Vocking, chief brand officer at London-based sustainability consultancy Eco-Age tells Wunderman Thompson Intelligence that these unconventional activations are “less about sacrificing sales and more about putting purpose at the heart of the brand. It is about building a business that will last 20 years and not five.” Vocking adds that one of Eco-Age’s clients, jewelry house Chopard, has chosen to use Fairmined gold after working with the consultancy. Chopard now works with the Alliance for Responsible Mining in Colombia to directly support four gold mines. Vocking explains: “As it is, Fairmined gold has a premium attached, but Chopard absorbs this as a company so that it is not passed onto the consumer.”

“Customers want to know that they are buying from a brand that they can trust and one that has committed to being better,” she adds. “This is not about being





As a single company, our impact is limited, but as a community, we can drive change that powers meaningful action beyond our walls.

Eric Artz, CEO, REI



perfect—it is about brands beginning to look at their supply chains and production processes, and starting to change the system.”

In another unconventional move, Travalyst launched in September 2019. Led by Prince Harry, the initiative was founded by competing companies Booking.com, Visa, Ctrip, TripAdvisor, and Skyscanner, with the aim of being “the driving force that paves a new way to travel, helping everyone explore our world in a way that protects both people and places, and secures a positive future for destinations and local communities for generations to come.”

George Wallace, chief executive of retail consultancy MHE Retail, notes that “in the last 12 months, sustainability’s gone from being a bit fringe to being really very, very mainstream. Everybody has to have a position on it.” But he also believes that “some of the moves don’t really have much meaning or impact. Closing stores during climate demonstrations in reality doesn’t contribute anything other than ‘we’re on your side.’”

Wallace says that it’s broader actions by mass retailers that will end up having a wider impact, such as UK supermarket chain Tesco’s pledge in November 2019 to remove a billion pieces of plastic from its products by the end of 2020. “That’s heavyweight stuff. That’s what really has a proper impact. I think customers respond well to that. It’s not just a gimmick,” he says. “The smaller gestures are still valuable; the exciting thing about this now is that big businesses are doing something about sustainability.”

Why it’s interesting:

Consumers care about sustainability and now, thanks to the wealth of information available online, they can be forensic in examining the transparency behind companies’ sustainable and environmental claims. Brands going against the capitalist grain, to stand up for sustainability and against climate change, demonstrate that they’re truly aligned with these causes—and their actions are moving larger businesses to make sustainability a priority, too.

40

Asia's generation Z

Asia's generation Z is coming of age in the world's fastest-growing region, amid trade battles and territorial disputes. They are shaped by the maturing of China's great market experiment, the opening up of Vietnam to the world and Japan's long economic stagnation.

Yet despite this turbulence all around them, gen Zers in Asia are working towards a future they see as largely positive, and in many cases using the technological tools now at their disposal.

Overall, they are more socially progressive. They think race matters less than it used to and seven out of 10 are willing to date outside their race, according to a survey of 4,500 gen Z respondents across nine countries in the new "Generation Z: APAC Edition" report by Wunderman Thompson Intelligence. Brands are likewise starting to emphasize inclusivity. Beauty brand Sunnies Face in the Philippines, for example, features warm colors suitable for all skin tones, without a whitening product in sight. Likewise with China's cult beauty brand Hedone, featuring men sporting their makeup range.

Gen Zers move easily between online and offline worlds, with 76% saying they are as comfortable shopping online as offline, although 62% say they still like



To remain relevant to this rising consumer group, brands need to understand and cater to gen Z's drive to make the world better—environmentally, socially and politically.

buying in a physical store. In Thailand, JD.com-backed fast-fashion platform Pomelo seamlessly merges online with offline retail. After placing an order on the brand's mobile app, consumers pick up their purchases at local checkpoints—in cafes, coworking spaces and gyms—where they can try on their clothes and instantly return items they don't want.

Like their global counterparts, gen Zers in Asia worry about climate change and environmental pollution, and are willing to stand up for political and social change. In Hong Kong, schoolchildren are balancing homework with protesting for greater freedoms, while young LGBTQ activists are showing up in force at Viet Pride, Singapore's Pink Dot SG and Taiwan Pride events.

Seven out of 10 overall think being LGBTQ isn't a big deal anymore, although young Indonesians are most likely to think it still is. In Taiwan, an ad for Kimlan soy sauce showed a household with two mothers in the kitchen, with the voiceover, "Different families have different flavors."

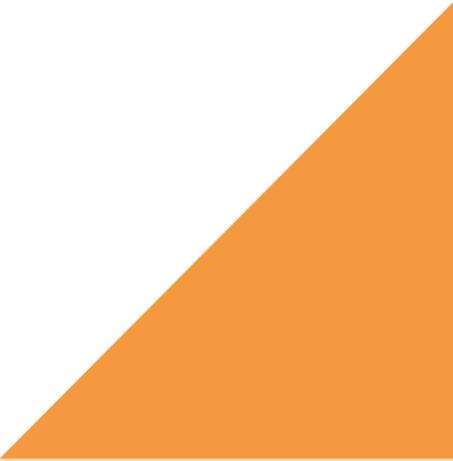
And yes, family still matters. Gen Zers in Indonesia, the Philippines, Thailand, Singapore and Vietnam are most likely to pick family members as personal heroes, mostly followed by teachers. Those in China, Hong Kong and Taiwan



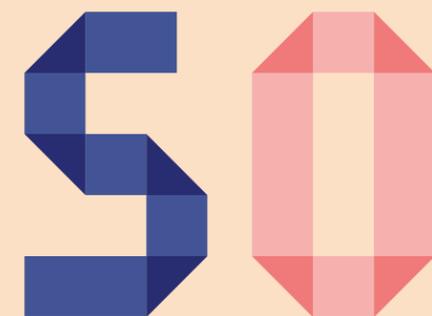
are most likely to pick celebrities as personal heroes; and young people in China also hold scientists, entrepreneurs and politicians in higher esteem.

Why it's interesting:

Gen Zers are entering adulthood saddled with huge challenges, including climate change, political upheaval and shifting gender and sexual identities—with a modern set of values to match. That means everyone's an activist in some way. "They are really questioning the norms and don't want to be straitjacketed," Gerda Binder, UNICEF's Bangkok-based regional gender advisor for East Asia and the Pacific, tells Wunderman Thompson Intelligence in the new "Generation Z: APAC Edition" report. To remain relevant to this rising consumer group, brands need to understand and cater to gen Z's drive to make the world better—environmentally, socially and politically.



Food & Drink





Futureproof recipes

As pressure to reduce food waste continues to mount, climate-conscious consumers are opening up to new recipes that are not only healthy for themselves, but for the planet too.

Future Food Today is a cookbook that aims to overhaul nonsustainable foods in today's fridges and pantries, and offer wholesome, environmentally friendly options. Released in May 2019 by Ikea's research lab Space10 in collaboration with creative agency Barkas, the recipes introduce ingredients tailored for the future palate. From bug burgers containing mealworms to algae chips to microgreen popsicles, the future of food is served in a familiar form and made from unusual—but potentially planet-saving—ingredients. “The aim is to inspire people to explore new delicious flavors and sustainable and healthy ingredients,” Simon Caspersen, cofounder of Space10, tells Wunderman Thompson Intelligence, “and to be a bit more curious and open-minded about food diversity.”





The research lab recognizes that dramatic changes need to be made to the way we consume and produce food. “In the next 35 years, our demand for food will increase by 70%, and we simply do not have the resources to achieve this demand on today’s diet,” says the lab.

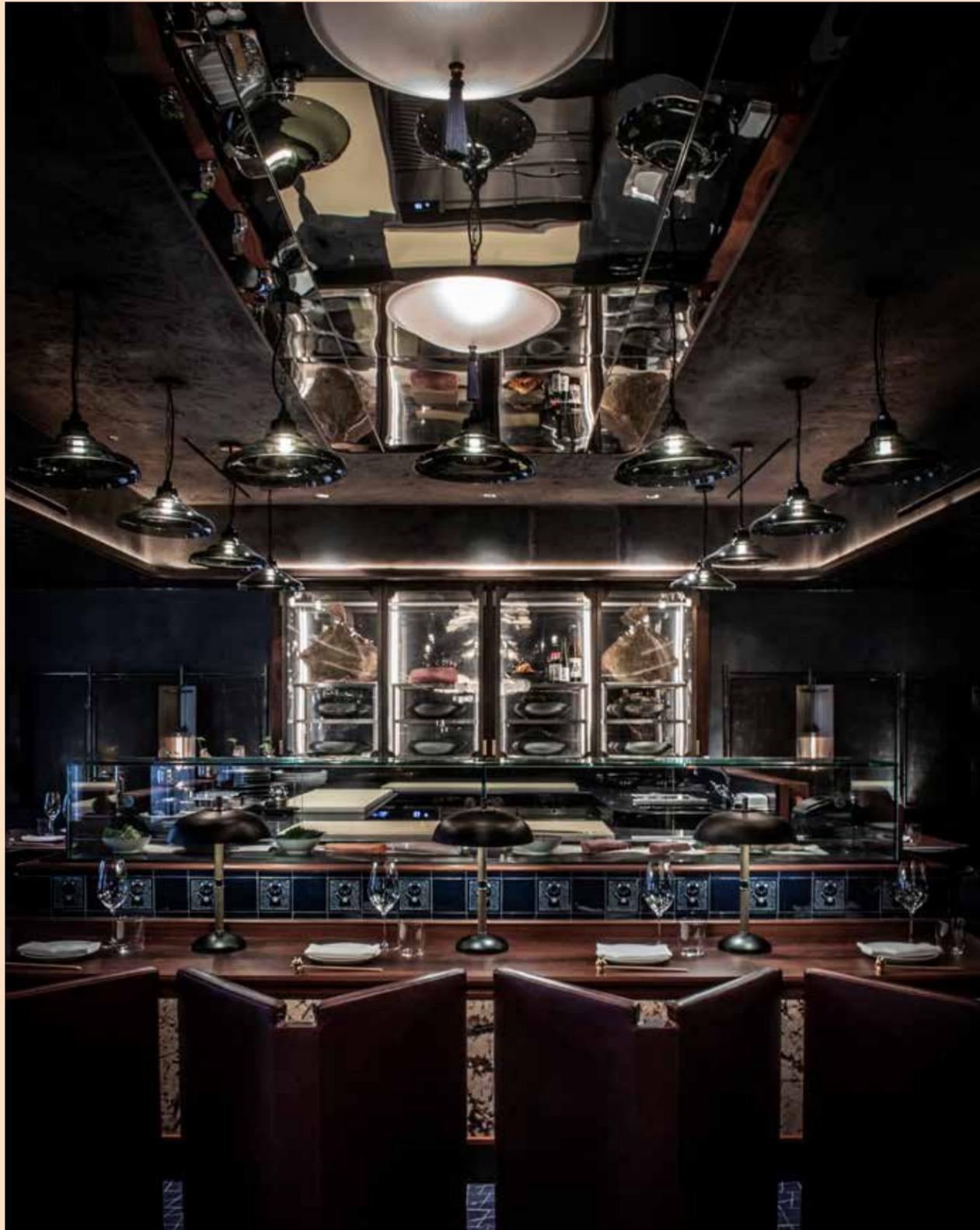
Innovative food brands are utilizing technology, science and food to tackle food’s impact on the environment, and consumers are readily embracing these options. Take Impossible Foods’ Impossible Burger, the plant-based burger that “bleeds,” which is now widely available for sale at supermarkets and even on the menu at Burger King and White Castle.

Dairy Farmers of America reported that sales dropped by over \$1 billion in 2018 compared to the previous year, while sales of dairy alternatives continue to grow. It appears that mainstream consumers are open to substituting unsustainable food and drinks with comparable or superior sustainable choices.

Why it’s interesting:

Consumers are pivoting towards a “climate diet,” consuming less meat and dairy, and seeking environmentally friendly alternatives. Food brands will need to start producing healthy and sustainable foods that not only feed consumers but also nourish the planet.





Anti-Instagram interiors

The newest restaurants are turning away from the monotonously predictable design vernacular fetishized by social media.

Lucky Cat restaurant in London, opened in June 2019, consciously avoids the color-saturated, eye-catching aesthetic popularized on Instagram. In contrast to the vivid palettes, bold wallpapers and punchy light fixtures found in the countless trendy eateries just begging to be photographed, Lucky Cat's deep colors and dim lighting create a shadowy atmosphere that isn't meant to translate well on screen.

Design studio AfroditiKrassa “deliberately went dark” to discourage people from sharing images on Instagram. “We tried to work with materials and colors that are subtle and classic, not too shouty,” the studio's founder, Afroditi Krassa, told *Dezeen*. “How many times do you visit a place because it looks great in a picture but disappoints in real life?”

Lucky Cat's distinctive environment prioritizes the tactile over the visual, creating depth through texture rather than relying on attention-grabbing





Going forward, consumers will respond to spaces that encourage them to live in the moment, rather than through the lens of their phone.



graphics. “There is relatively little contrast between colors, pattern and finish, yet a lot of richness in texture and tactility—Lucky Cat is a layered design that reveals more every time you visit,” Krassa explained.

The dark and sensual design at Marcus, the restaurant and bar at Montreal’s new Four Seasons hotel that opened in May 2019, similarly encourages in-situ enjoyment. The design is “deeply rooted in intimate interactions, singular moments, and glamor,” Atelier Zébulon Perron, the design studio behind the space, told *Dezeen*.

In spring 2019, architect Bernard Khoury redesigned Beirut’s B018, a nightclub in an underground bunker that has become an institution since it opened in 1998. Khoury has doused the interior in a monochromatic deep gray, with macabre design elements adding to the somber aesthetic.

Why it’s interesting:

These designs signal the end of a flashy “look at me” era that canonized experiences and spaces crafted expressly for sharing on social media. Going forward, consumers will respond to spaces that encourage them to live in the moment, rather than experiencing the world through the lens of their phone.



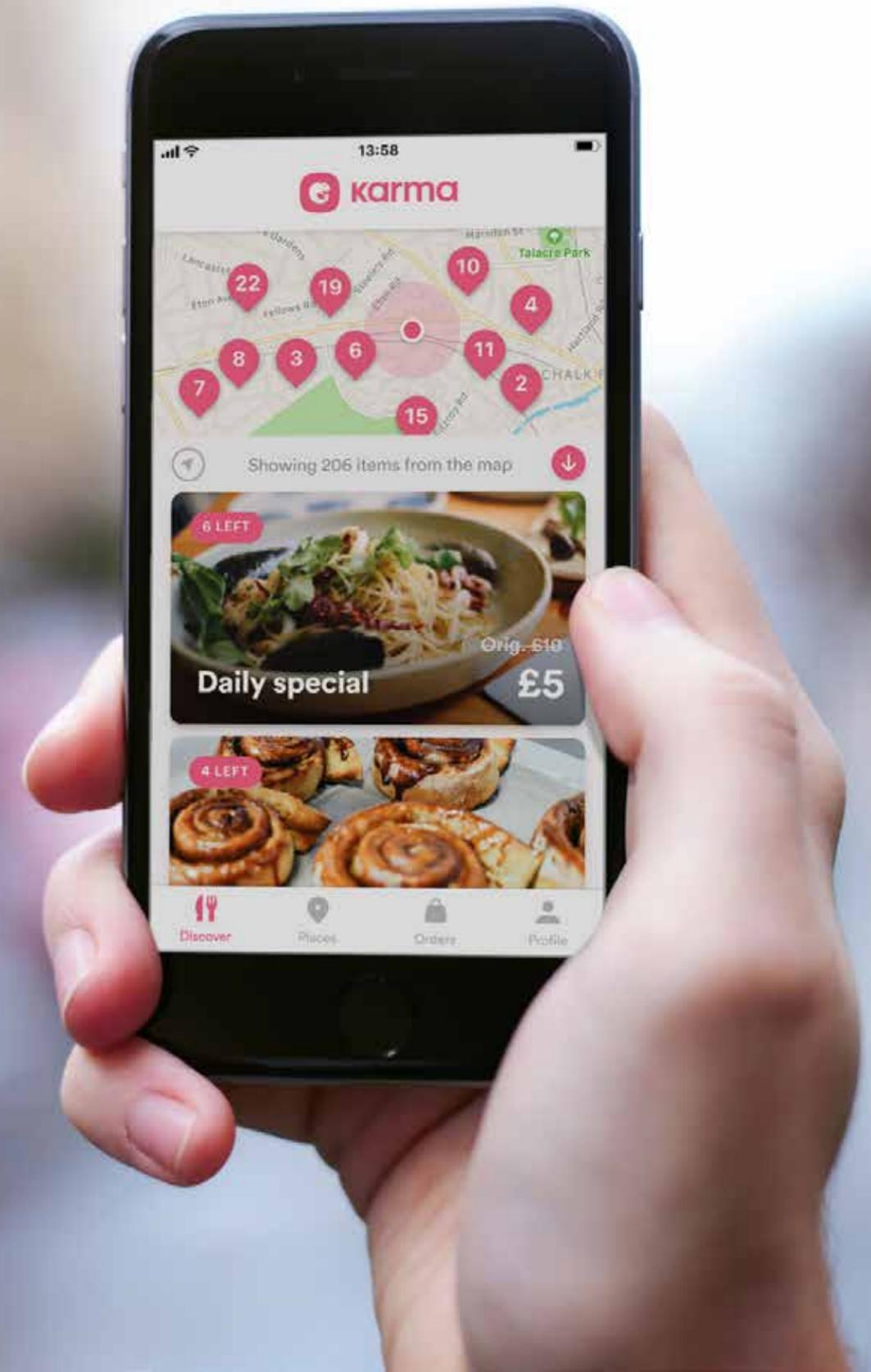
Solving the surplus

Companies are designing sophisticated solutions to tackle food packaging waste.

Evolving efforts are trying to resolve the waste issue around food packaging and make it easier for consumers to make waste-free choices. New contenders are offering waste-free alternatives to everyday products and name brand favorites, so consumers don't have to change their daily habits.

In September 2019, Swedish food-waste app Karma expanded its partnership with household goods brand Electrolux, piloting the Karma smart refrigerator in Stockholm's central underground station. Consumers can purchase discounted food on the Karma app and collect their items from the fridge, making it easier to pick up food on the journey home. The pilot follows the 2018 launch of the smart fridge in Stockholm's ICA Kvantum Liljeholmen supermarket, where shoppers can purchase surplus food items at a reduced price in store. Charlie Humphries, Karma's UK marketing manager, tells Wunderman Thompson Intelligence that it's changing the "small patterns in our behavior that can make the difference."

Loop, which launched in the United States in May 2019, allows consumers to purchase everyday grocery, personal care and household products in durable, refillable packages. Shoppers pay a refundable one-time deposit to join the





scheme, and Loop delivers the products to their door in a durable Loop Tote box. As products run out, users put the packages back in the Loop Tote. They then schedule a pickup and the packages go back to Loop to be cleaned and reused. An auto-refill option automatically adds favorite products to the next shopping list.

In Northern Ireland, the new Gander app recently partnered with Henderson Group, the parent company of a number of popular supermarkets, to help minimize waste in food stores. The app notifies local shoppers as soon as a food item's price is reduced, giving them a heads-up to get to the store. The SpareEat app combats food waste in Israel by connecting users to restaurants, supermarkets and cafés so they can purchase surplus food. Both apps, which were launched in fall 2019, benefit consumer and retailer alike.

Why it's interesting:

By creating apps and platforms which utilize existing food and delivery systems, businesses are helping consumers to easily and conveniently adopt greener practices. Brands have a huge opportunity here to provide innovations, drive consumer momentum and support the move towards sustainable living.

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Complex cocktails

More is more at these bars slinging drinks with 20-plus ingredients.

The A-Z Cocktail, conceptualized by Bompas & Parr and available at W Hotel in Times Square during January 2019, boasts one ingredient for every letter of the alphabet.

“It would be all too easy to randomly combine a minibar’s worth of ingredients and make something undrinkable. The challenge here was to create something beyond novelty for its own sake and end up with a balanced drink,” says Harry Parr, cofounder of Bompas & Parr and the cocktail’s creator.

The ingredient list includes eight types of rum, three types of cognac, one of mezcal, one of gin, six liqueurs and two types of bitters, as well as vermouth and other aperitif wines from around the globe.

The objective? An unusual drinking experience—one that consumers would be hard-pressed to create at home. “The idea with mixing so many rums is to get a more intriguing flavor profile than what you might be able to achieve with a simple serve,” says Parr.



The beverage program at upscale Mexican eatery Xixa in Brooklyn offers deconstructed takes on classic cocktails. These complex creations feature multi-ingredient ice cubes which are then dropped into the drinker’s liquor of choice. The Old Fashioned Cube, for example, freezes together 23 ingredients to recreate the spicy, citrusy, smoky essence of the cocktail. The ice cube is added to a couple of ounces of alcohol, and the flavor profile evolves with each sip as the cube melts, for a progressive and unique drinking experience.

Why it’s interesting:

With millennials and generation Z drinking less, it takes more for alcohol to grab their attention. Bars and restaurants are stepping up their game in response, leaning into sensational, compelling cocktails that pique drinkers’ interest and offer a unique experience that can’t be recreated at home.



Transportational interiors

Seeking an edge that goes beyond their menus, cafés and restaurants are conjuring up elaborate interiors that transport consumers to exotic locales.

Now getting a cup of coffee can involve a walk through a Zen-like garden and ordering a cocktail can propel you to outer space.

At a Beijing shopping mall branch of Shanghai chain Seesaw Coffee, Nota Architects has created a stone path through lush foliage and mossy boulders, with cherry blossoms overhead and occasional puffs of white fog to add to the atmosphere. Wooden decks and benches ring the space, with the coffee bar theatrically positioned on a softly lit stage.

At Shanghai tea house Icha Chateau, design studio Spacemen hung 35,000 meters of shimmering, layered gold chains from the ceiling, evoking traditional Chinese tea terraces. The opulent interior underlines the rising design stakes in a city that also houses the largest Starbucks in the world, where coffee is described as theater.

Tokyo also has its share of transportational interiors. Nikunotoriko serves Japanese-style barbecue, competing with countless other restaurants in the



city. The difference here is that architect Ryoji Iedokoro has created a dining room in a cave, employing low lighting, walls of jagged rock and a translucent floor that resembles water underfoot.

Those wanting to be transported even further can head to Tokyo's Bar Planetaria, owned by Konica Minolta, which constructs and operates planetarium theaters. The planetarium hosts regular drink and food evenings, where for a few hours, Tokyo denizens can kick back on a circular sofa and drink among the stars. From August to November 2019, the domed theater offered views of the Hawaiian night sky.

A planetarium-like domed ceiling also features in upscale Copenhagen restaurant Alchemist. The domed area is one of several sections that diners experience on a visit that could last up to five hours. There might be images of jellyfish swimming among plastic bags overhead, to raise awareness of sea pollution, or a dark sky streaked with the northern lights. Rasmus Munk, the chef and founder of Alchemist, told *Food & Wine* magazine the restaurant is designed to make you feel "as though you've left the outside world and arrived somewhere new." Hence it may not, as its website warns, be ideal for business discussions or nervous first dates.

Why it's interesting:

Transportational interiors are emerging at a time when competition is heating up among cafés and restaurants. This is particularly true when it comes to capturing generation Z, which prizes experience and yearns for a story behind every cup of tea or coffee. These cafés and restaurants provide brief moments of escape from busy cities, without having to board a train, a plane—or a rocket ship.



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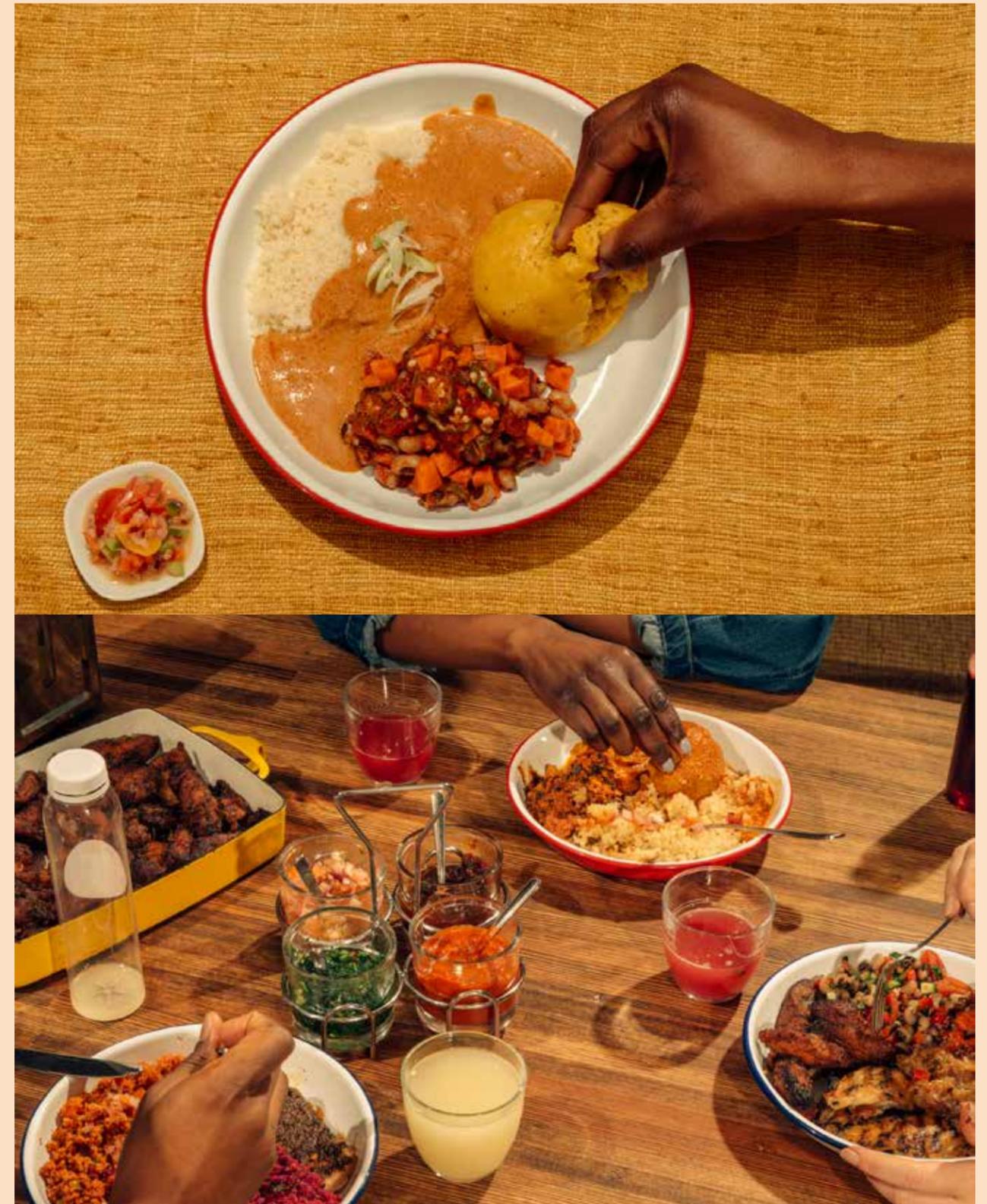
Biodiverse dining

Chefs are cooking up biodiverse menus that cater to climate-conscious diners.

The United States has lost 90% of native fruit and vegetable varieties since the 1900s. Today, just 12 plant sources and five animal sources make up 75% of the food we consume, according to the Food and Agriculture Organization of the United Nations, despite the fact that there are approximately 300,000 edible plant species globally. And just three crops—wheat, corn and rice —make up almost 60% of plant-based calories in most modern diets.

This reliance on a handful of species poses a serious threat to ecosystems and food security. Biodiversity is crucial for ensuring everything from human health to ecological stability to wildlife protection, as the World Wide Fund for Nature (WWF) attests. The wildlife conservation organization's March 2019 "Future 50 Foods" campaign, in collaboration with Knorr, hopes to encourage people to diversify their diets in an effort to protect endangered species.

The "Future 50 Foods" report includes a list of 50 plant-based ingredients consumers and chefs can incorporate into meals. "Diversified diets not only benefit human health but benefit the environment through diversified production systems that encourage wildlife and more sustainable use of resources,"





By supporting underutilized crops in my menus, I contribute to saving our planet's biodiversity. In the current context, designing a menu should be a conscious and responsible act.

Pierre Thiam, chef and owner, Teranga



explains Peter Gregory, research advisor at Crops For the Future, which contributed to the WWF campaign.

At Teranga, a West African eatery that opened in New York City in February 2019, chef and owner Pierre Thiam emphasizes ingredients that expand today's limited diet. "By supporting underutilized crops in my menus, I contribute to saving our planet's biodiversity," Thiam told *Forbes.com*. "In the current context, designing a menu should be a conscious and responsible act."

Teranga's menu features ingredients like baobab, moringa and fonio, overlooked in the West, which are not only central to West African cuisine but also support biodiversity. Take the ancient grain fonio. "It's a grain that's great for the planet," said Thiam. "It's drought resistant; it grows in two months; it scores low on the glycemic index, so it's great for your health too."

Lou, which opened in Nashville in September 2019, substitutes more conventional processed sugars and flour with ingredients such as coconut sugar and buckwheat to achieve a more diverse diet.

"By actively championing biodiversity inside and outside the kitchen, chefs can play a key role in creating interest in and a market for more diverse ingredients, helping to support farmers' livelihoods, improve diets and strengthen our food systems," Marie Haga, executive director of the Global Crop Diversity Trust, which supports crop diversity to protect global food security, told *Forbes.com*.

Why it's interesting:

As examples such as the recent surge in veganism and the sweeping renouncement of plastic straws illustrate, diners are shifting their eating habits to support environmental efforts. Diversified diets offer another avenue for environmental activism—and a tastier meal.



Co-cooking kitchens

Cooking is getting communal.

Dense urbanization is creating a need for smarter use of spaces, while budding culinary entrepreneurs are looking for more cost-effective options when it comes to getting started in the business. Taking cues from the explosion of coworking offices, co-cooking spaces are opening up around the world to cater to the growing desire for a place in which to not only innovate and network but also cook and socialize.

In July 2019, Samia Bingham, founder and CEO of culinary services startup Flavors Culinary Group, won the Small Biz Challenge in Los Angeles, hosted by the UPS Store and *Inc* magazine. The Maryland-based winner is using her prize money to launch Flavors, The Culinary Complex, a kitchen incubator where chefs and culinary specialists can innovate and network with other members of the culinary community. The hub is set to open in summer 2020.

WeWork launched WeWork Food Labs in spring 2019 in Manhattan, initially as a membership-based scheme. The WeWork Food Labs New York flagship and its first accelerator program both launched in October.

Menachem Katz, head of operations at WeWork Food Labs, tells Wunderman Thompson Intelligence, “WeWork Food Labs aims to empower innovators

across the food and agricultural space, giving them the tools and resources they need to create sustainable solutions that address challenges both within our own community and on a global scale.” Accepted startups receive investment from WeWork, and access to industry experts, investors and VCs, as well as workshops and events, not to mention space in the R&D kitchen.

Mission Kitchen will open its first two London co-cooking facilities in 2020. These also offer mentorship opportunities, events and professional kitchens for their members.

Co-cooking isn’t just for professionals, however. Communal kitchens are opening up in countries like Japan where apartment space is limited. Kitchen Studio Suiba in Tokyo was designed as a rental space where users can cook for each other, as well as a place where food and drinks businesses can interact with their customers.

Why it’s interesting:

With space at a premium and costs for kitchen equipment prohibitive for many, co-cooking kitchens are a practical and sociable solution for home chefs and culinary specialists alike.





Sober bars

A wave of restaurants and bars are dedicating themselves to alcohol-free service.

According to the World Health Organization, between 2000 and 2016 the number of drinkers in the world decreased by 5%. Accompanying this shift, consumers opting for teetotal lifestyles—or simply cutting down on booze—are looking beyond simple juices and soft drinks as alcohol alternatives, and are in search of new concoctions to satisfy elevated palates. As a result, restaurants and bars are creating teetotal environments, and curating non-alcoholic drinks menus.

Getaway opened in April 2019, providing a swanky social hang-out for Brooklyn teetotalers. The menu boasts a list of sophisticated beverages, each containing a complex blend of flavors, including quirky ingredients such as pink peppercorn, juniper and fennel—without a single drop of alcohol on site.

In New York, Listen Bar has been creating teetotal buzz since it opened in October 2018. Proving it is possible to have a good night without alcohol, it hosts themed party nights once a month where visitors can enjoy an array of non-alcoholic cocktails and craft beers while taking part in activities such as karaoke, astrology readings, a sex-toy version of truth or dare and even live tattooing.

The Virgin Mary opened in Dublin in May 2019, claiming to be the first permanent alcohol-free bar in Ireland that follows standard pub opening times and contains all the traditional vibes of a regular pub. It offers carefully hand-crafted cocktails with additional twists, and even a brew that mimics the texture and appearance of Guinness, made with chilled nitro coffee served from a stout tap.

Choosing to focus on the health-conscious client, London's Redemption bar serves nourishing booze-free alternatives, drawing on ingredients like activated charcoal, CBD cannabidiol extract in its lager, and kombucha on tap, all claiming a ream of health benefits.

For bars that want to delve into the teetotal space, non-alcoholic contenders like Seedlip are making it easier. Seedlip's beverages, made using a variety of herbs and spices, provide an alternative to spirits in more than 300 Michelin-starred restaurants and are served in more than 25 countries. Aecorn's non-alcoholic aperitifs, made from Pinot Noir, Meunier and Chardonnay grapes, are designed to be served as a spritz or mixed in a cocktail.

Why it's interesting:

As consumers shift towards healthier lifestyles, bars and drinks brands are catering to this shift without making clients feel that they are missing out on social experiences.





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Regenerative farming revolution

Food brands are tackling climate change through regenerative farming.

Intensive farming has so depleted the world's soils that the United Nations has warned we could have just 60 harvests left. In response, some food brands are asking producers to transition to regenerative agriculture. This term covers a raft of techniques that actively restore soil quality, with the added benefit of sequestering carbon and reducing greenhouse gases, thus delivering a win-win—food that's better for the planet and for people too.

In an interview with *Pebble* magazine, Guy Singh-Watson, founder of the UK's Riverford Organic Farmers, explained that “food grown in healthy soil is healthier. It's better balanced nutritionally, with fewer toxins. If you're growing your own food that's the reason you want to get to grips with the soil near you. I've met farmers who won't eat the produce that's grown on their own farms.”

Danone is now leading a coalition of 19 major companies, including Nestlé, Unilever and Kellogg Company, to push for regenerative agriculture, aiming to reinvent our food system and restore diversity. According to the Food and Agriculture Organization of the United Nations, just nine plants account for





Food grown in healthy soil is healthier. It's better balanced nutritionally, with fewer toxins.

Guy Singh-Watson, founder, Riverford Organic Farmers

two-thirds of the world's crop production, a key factor in the depletion of soil quality.

General Mills has also announced a major commitment to regenerative agriculture, promising to adopt the techniques on a million acres of farmland in the United States by 2030. The company has also donated \$650,000 to Kiss the Ground, a non-profit organization that trains farmers to use soil health practices to make land more resilient. General Mills brand Annie's Homegrown is also helping to raise awareness of soil health via its Soil Matters campaign, which has featured on limited-edition packs of products made with ingredients grown using regenerative practices.

The opportunity to combat climate change has led outdoor brand Patagonia to partner with Hopworks Urban Brewery in Oregon and launch its own Long Root beer brand. The beer is brewed with a trademarked novel grain called Kernza that removes more carbon from the atmosphere than other grains, requires less water and pesticides, and helps prevent soil erosion, thanks to those eponymous long roots.

Why it's interesting:

In the future, food brands that adopt regenerative agriculture practices can be a powerful force in the fight against climate change, combating greenhouse gases and restoring soil quality.



Hot new ingredients

Mounting climate concerns are inspiring a new look at ingredients that have previously flown under the radar.

Solein powder

A Finnish company called Solar Foods is developing a protein powder from nothing more than air, water and electricity. Solein powder, estimated to hit the market in 2021, is about 65% protein, on par with soy and algae. It is, the company website declares, “an entirely new kind of food that is both natural, and free from the burdens of agriculture and aquaculture.”

With viable farmland diminishing and ethical questions arising around eating animals, there’s been a flood of research globally into future sources of protein, from culturing meat in labs to frying up crickets and blending mealworms. Each has its downside. Lab-grown meat is hugely expensive and the thought of eating bugs and insects makes many people queasy.

Solein powder doesn’t have any of those issues. It uses a fermentation process similar to that used for making wine or beer; however, instead of putting yeast into a sugary liquid, Solar’s microbes are nourished by small bubbles of

hydrogen and carbon dioxide, producing a fine powder that looks and tastes like wheat flour and can be used as an ingredient for food such as yoghurt, shakes or pasta.

Solar Foods' technology is sparking interest from those with an interest in making food in places where arable land and sunlight is scarce—in some cases, very scarce. Solar is working with the European Space Agency to develop the technology for Mars missions, CEO Pasi Vainikka told BNN Bloomberg.

Watermelon seeds

Watermelon seeds, a traditional snack for guests at Chinese New Year and other festivals around Asia, are getting a modern makeover in the global health food market.

The world watermelon seed market is expected to grow to \$751 million in 2025, according to Grand View Research, Inc. The bulk of the market is composed of raw seeds, a nutritious vegan alternative to other fats.

Watermelon seeds are also showing up in some novel applications. Atomo, a Seattle-based startup is reverse-engineering coffee, aiming for a more sustainable version of the brew without using actual coffee beans.

Climate change is expected to reduce the land suitable for coffee production by as much as half by 2050, according to the Climate Institute. By 2080, wild coffee—a key genetic resource for coffee farmers—could be extinct, say the institute's researchers. Atomo's brew uses a combination of watermelon seeds, sunflower seed husks, acacia gum and yerba mate caffeine. The goal, cofounder Jarret Stopforth told CNBC, is to re-create the "core components





Sustainability and climate concerns are driving innovation in the food and drink category—and fostering a newfound appreciation for previously overlooked ingredients.



of coffee—the body, the mouth feel, the aroma and flavor.” The company hopes to ship its first batch of cold brew to its Kickstarter backers in 2020 and to start retailing by mid-year.

Watermelon seeds also appear in not one but two of Whole Foods’ top 10 trends for 2020—as a new plant-based alternative to soy in supplements and as a spread in the form of watermelon seed butter.

Butterfly pea flower

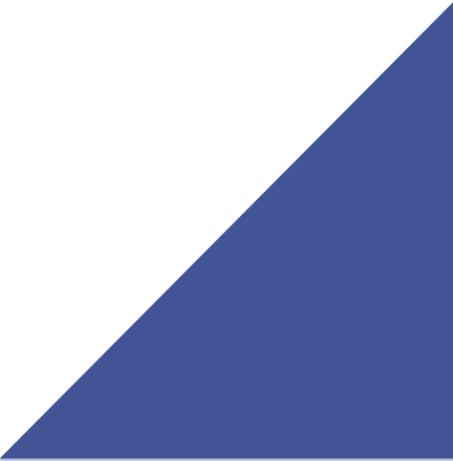
Chefs and mixologists on multiple continents are experimenting with the vibrant indigo and color-changing properties of the butterfly pea flower. The flower—long used in Southeast Asian cakes and rice dishes—is now showing up around the globe, its popularity fueled as much by its health benefits as by its distinctive color.

Thirsty mag ran a piece in May 2019 featuring eight different blue pea flower cocktails served across the United States, from the Little Violeta at Geist in Nashville (other ingredients include gin, pineapple and aloe) to the Purple Rain at Madison on Park, San Diego (peach liqueur, lemon, egg white and a few drops of CBD oil). *Food & Drink* magazine featured three butterfly pea flower drinks to make for summer 2019, using citric acid to turn the hue from blue to purple.

Butterfly pea flower is used to tinge lobster linguine at the Woodside Inn in Colaba, Mumbai. In Australia, the Hunter Distillery makes a butterfly pea liqueur.

Why it’s interesting:

Sustainability and climate concerns are driving innovation in the food and drink category—and fostering a newfound appreciation for previously overlooked ingredients.



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Beauty

60



Euphoric makeovers

Make way for maximalist beauty.

Shimmering streams of glitter tears, unabashed multicolored eyeshadows and a glistening constellation of rhinestones are just a few of the eye-catching looks that define HBO's coming-of-age hit series *Euphoria*. The show took to the screens in June 2019 and has sparked a makeup frenzy on social media.

Vogue published an article in November 2019 titled "Why the fashion world can't get enough of *Euphoria* makeup" and Instagram now offers *Euphoria* filters created by Igor Saringer. Why the hype? Because the dazzling, attention-grabbing looks in the show fully capture the characters' self-expression—an aesthetic espoused by generation Z.

"Gen Z is completely redefining what makeup can and should be used to do, by embracing a total freedom in expression and defying beauty and makeup norms," the show's makeup artist Doniella Davy told the *Hollywood Reporter*. "I love seeing how these young artists and humans are flipping the whole idea of beauty and makeup on its ass."

Glossier launched the Glossier Play collection of "dialed-up beauty extras" in March 2019. This playground of possibilities promotes bold and dramatic looks,





Gen Z is completely redefining what makeup can and should be used to do, by embracing a total freedom in expression and defying beauty and makeup norms.

Doniella Davy, makeup artist



with products such as Vinylic Lip and Glitter Gelée offering ultra-shiny lacquered lips and jeweled-effect eyes—essentials to building a *Euphoria*-inspired look.

The expressive and maximalist makeovers that once felt exclusive to high fashion are now being democratized thanks to *Euphoria*. Davy said the show's creator Sam Levinson encouraged her to “introduce a new makeup language,” and with that she has opened new possibilities of makeup experimentation for gen Z and beyond.

Why it's interesting:

Euphoria has tapped into gen Zers' desire for makeup with meaning and the notion that the beauty brush can paint a story. Brands should rethink their makeup tools as a channel for capturing a generation of self-expressive youth wanting to break stereotypes, convey how they feel and be fueled by creative inspiration to experiment—and, more importantly, have fun.





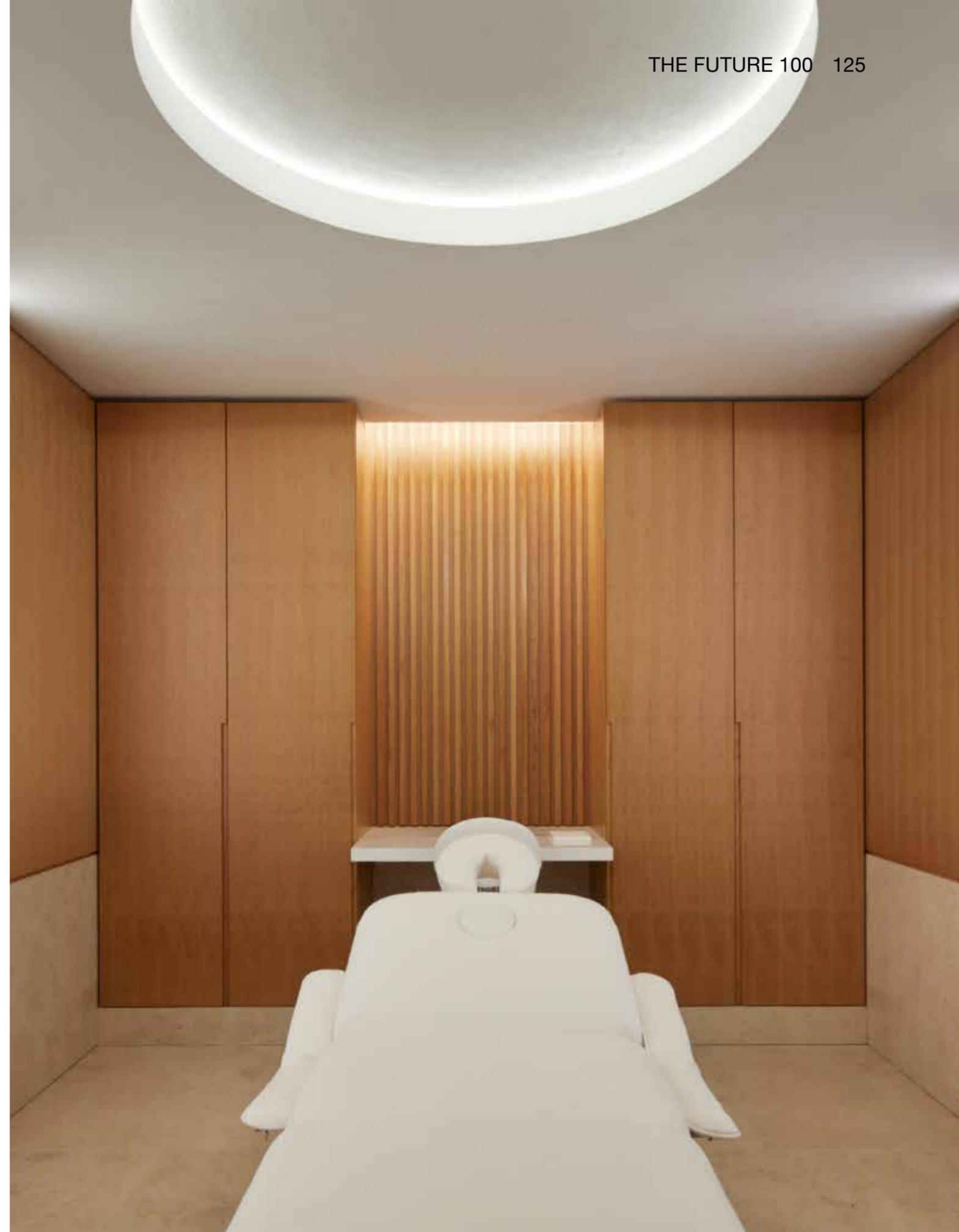
Molecular spas

Luxury skincare brands are diving into DNA analysis for the ultimate in bespoke beauty.

EpigenCare, a winner of Johnson & Johnson Innovation's contest for biotech beauty companies in 2018, piloted Skintelli in February 2019 with plans for a full rollout in 2020. Skintelli leverages epigenetics to analyze skin. The personalized, direct-to-consumer service uses next-generation DNA sequencing to offer consumers deep insight into their skin's genetic condition and predisposition.

British luxury retailer Harrods incorporates DNA analysis into its beauty services at the Wellness Clinic, an integrative beauty spa opened in 2018. For the Gen Identity service, guests give a saliva sample and complete a lifestyle assessment and these are used for skin diagnosis and the preparation of a treatment plan. "We have developed a unique, personalized cosmetic treatment for the skin based on the analysis of the DNA of each person," explains the clinic's José María García Antón. The results are used to craft a tailored skincare regimen and to create a bespoke facial cream that targets the individual's specific needs and genetics.

Cult beauty brand Biologique Recherche is leveraging DNA for its latest luxury offering. The My Beauty DNA kit offers a full analysis of genetic data by



analyzing cheek swabs to assess an individual's genetic predisposition to skin concerns such as collagen breakdown, glycation (an excess of sugars that causes deep wrinkling), inflammation, sensitivity, free radical damage and pigmentation.

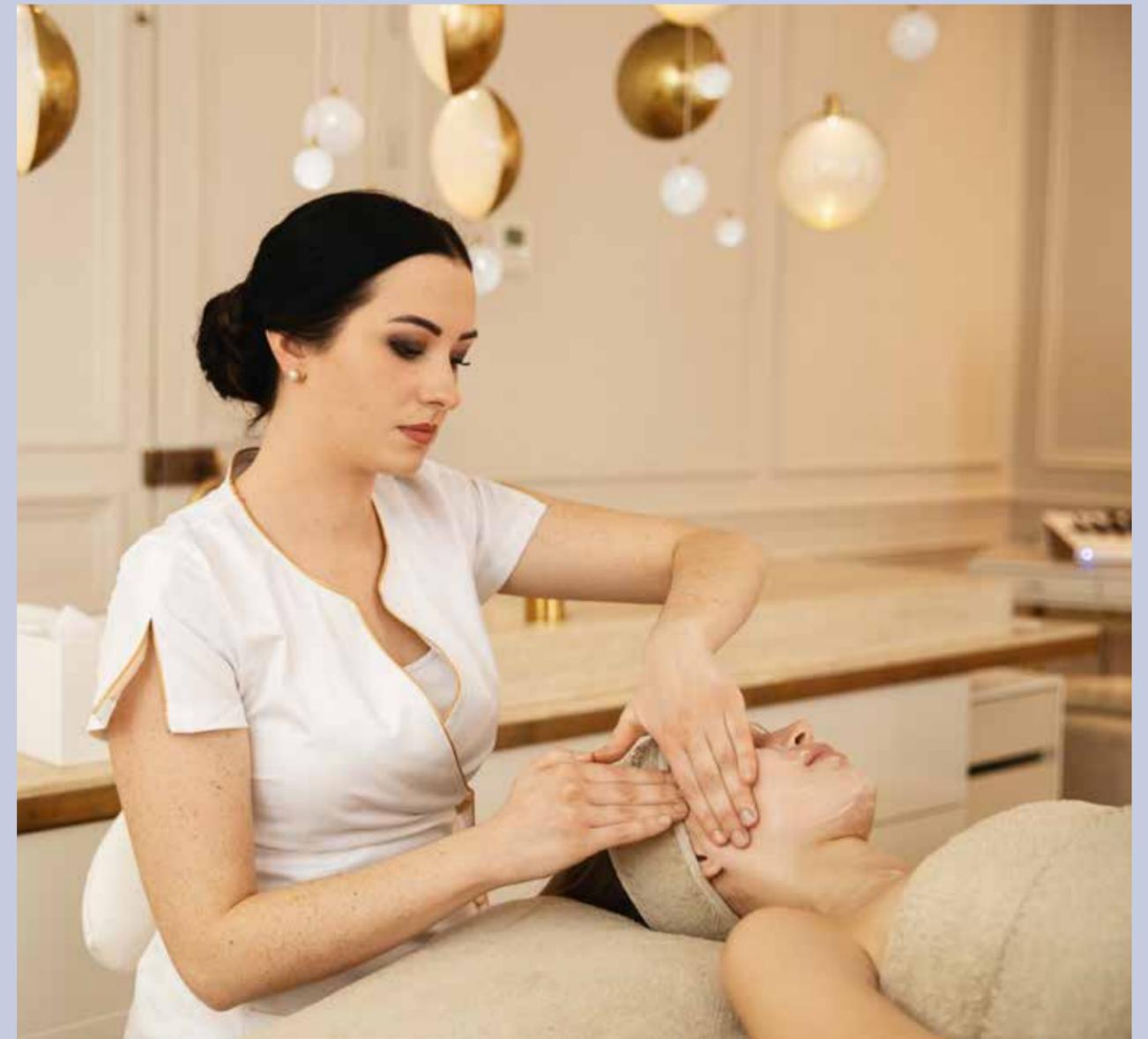
“Understanding your genetic predispositions helps both the patient and the dermatologist to better understand an individual skin's inherited needs and



can explain up to 60% of factors affecting your skin's condition,” says Raphaëlle Faure, Biologique Recherche brand manager.

Why it's interesting:

Services such as 23andMe have democratized DNA testing, and consumers are looking for new ways to integrate genetic analysis into their daily routines, revolutionizing everything from diets to beauty habits.





Transhuman beauty

Designers are looking beyond traditional beauty standards, experimenting with transhumanist looks that will evolve beauty as we know it.

“A revolution is unfolding in operating rooms, labs, artist and designer studios across the world,” wrote trend forecaster and designer Geraldine Wharry in her article “The transhuman future is here” for *Dazed Beauty*. Wharry depicted a landscape where science, technology and design come together to exalt a transhuman aesthetic. “New beauty standards will emerge out of this transhumanist scenario in which mutant creations would colonize our current traditional sense of reality,” she predicts.

As science steadily merges human and machine, the beauty and fashion industry borrows this concept to create forms and features that transcend traditional beauty standards. In fall 2019, Balenciaga sent models down the runway with dysmorphic features, sporting exaggerated, sculpted cheek bones and overly plumped lips for its spring/summer 2020 collection at Paris Fashion







A revolution is unfolding in operating rooms, labs, artist and designer studios across the world. The transhuman future is here.

Geraldine Wharry, trend forecaster and designer



Week. The luxury fashion brand explained that the looks aim to “play on beauty standards of today, the past and the future.”

Rick Owens replaced traditional makeup aesthetics with prosthetic horns, bulging black eyes and other face-altering features in the show for his fall/winter 2019 collection. In October 2018, *Vogue* featured the self-described “transhuman” Instagram-famed duo Fecal Matter, and also showcased the pair’s extreme three-hour beauty routine on *Vogue.com* in March 2019. The artists have created a pair of \$10,000 boots that blend into human skin, replacing conventional stilettos with skin heels, and plan to release a cheaper and more accessible version.

Why it’s interesting:

Transhuman beauty marks a further step toward the uprooting of conventional beauty standards, an evolution of the 2018 Grotesque Beauty anti-beauty movement. Anticipating a future where natural ecosystems and human existence may be fundamentally altered, consumers and designers are beginning to re-evaluate the definition of beauty.



S4

Skintellectuals

Skincare devotees are turning to experts in scientific fields to deliver technical, precise products.

Launched in October 2019, Noble Panacea is a luxury skincare line developed by Sir Fraser Stoddart, the 2016 Nobel laureate in chemistry. The trademarked Organic Molecular Vessels derived from his research are 10,000 times smaller than skin cells, and offer a new product delivery system which enables improved product penetration and absorption. “The precise selection and encapsulation of active ingredients aims to deliver unprecedented results,” says the scientist.

Atolla launched in August 2019 with a mission to make consumers experts on their own skin. Founded by graduates of the Massachusetts Institute of Technology (MIT), Atolla leverages machine learning and data analysis for



precise and hyper-personalized product formulations that take into account everything from medications and diet to local air quality and pollution, and also the oil, moisture and pH levels of each individual’s skin. Each month users take a skin test and receive an updated serum. The formulas are accompanied by a precise breakdown of ingredients and a detailed explanation of what each component does. So, just as Atolla’s algorithm learns from the data, subscribers’ knowledge of their skin health improves with each use. Maelove is another skincare line founded by MIT graduates—a roster of cancer and brain researchers, chemical engineers and medical doctors. “We start by looking at proven clinical research in peer-reviewed journals and collaborate with brilliant chemists, dermatologists, plastic surgeons and medical researchers to create formula blueprints,” the brand explains.

Why it’s interesting:

Scientific skincare is raising the bar for a growing class of educated consumers. Offering scientific levels of expertise and insight into skin, these new brands are answering demand for education and deep insight into skin health.





Menopause beauty

The beauty industry is catching on to a powerful group of consumers: women experiencing menopause.

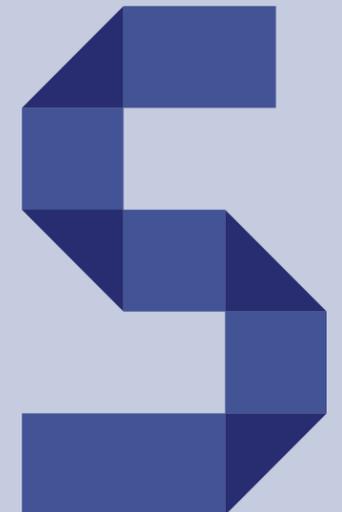
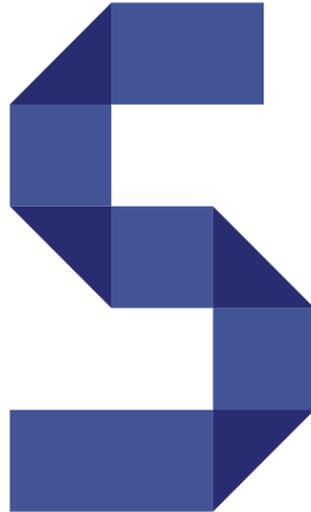
“After a few million years, we figured it was time,” says Kindra, a new brand backed by Procter & Gamble. It offers a beauty and wellbeing range for women experiencing menopause and is just one of a wave of brands that is waking up to a major opportunity.

According to the North American Menopause Society, more than a billion women around the world will be experiencing menopause in 2025. While menopause is nothing new, the way women approach this phase of their life is changing. As our report “Elastic generation: the female edit” revealed, a new generation is ripping up the rules and reinventing life past 50.

Fay Reid (@9to5menopause), a London-based blogger aiming to take the stigma out of menopause, wants brands to acknowledge this shift. “What I want brands to realize,” she tells Wunderman Thompson Intelligence, “is that women like me in their 40s and 50s still like makeup and fashion, just like they did in their 30s. I still want to look and feel good.”

Menopause brings a host of changes for women. Alongside hot flashes, they can experience dry, dull or dehydrated skin, reduced skin elasticity and even





breakouts. At a time when women are turning away from anti-aging messaging (68% of UK women aged 53-72 use beauty products to look and feel their best, rather than look younger, according to Wunderman Thompson Intelligence research), there is potential for brands that can offer targeted, effective solutions.

In addition to Kindra, several other meno-friendly brands were launched in 2019. Pause Well-aging is a US startup founded by Rochelle Weitzner, a beauty industry veteran who reached menopause and realized there was a dearth of suitable skincare products. Better Not Younger, a US brand tackling

menopause-related hair issues such as thinning and brittleness, was founded by women in the industry who also spotted a gap. Alongside the startups, big players such as Vichy are dipping their toes in the water.

Why it's interesting:

Currently these brands are targeting an affluent audience. There's a broader opportunity to cater widely to women, offering more affordable price points as well as more inclusive solutions that meet the needs of all ethnicities. "The brand that delivers something that's inclusive will clean up, I promise you," says Reid.



IRL filters

The digital overlay has given beauty consumers a new lens to push experimentation with new looks.

From inspirational to real life, these beauty filters are reimaging contemporary trends that can live both online and offline.

New skincare brand Starface launched a collection of star-shaped pimple patches called Hydro-Stars in September 2019, bringing the emoji aesthetic into the real world. The playful acne stickers are akin to star emojis and make for a great Instagram-worthy portrait; the remedy for a zit has never looked so fun. “It’s a subtle accessory—a little accent piece that you see when you’re face to face with somebody—and it’s super-photogenic and cute,” cofounder Julie Schott told *Vogue*.

A recent movement on TikTok is driving what *Dazed Beauty* described as “a roulette of body mods.” From temporary facial stickers to permanent piercings, the trending #piercingchallenge hashtag on TikTok sees users cycle through Snapchat’s series of digital facial piercings with their eyes closed. The challenge is to then get a real-life version of whatever piercing they randomly land on. As



of mid January 2020, the hashtag had over 98 million views, with some users taking up the challenge and others donning fake piercings instead.

Why it’s interesting:

Driven by the playfulness with online filters of generation Zers and younger millennials, and their drive to push beauty boundaries, digital filters are inflecting a direct and very real influence on physical beauty looks.



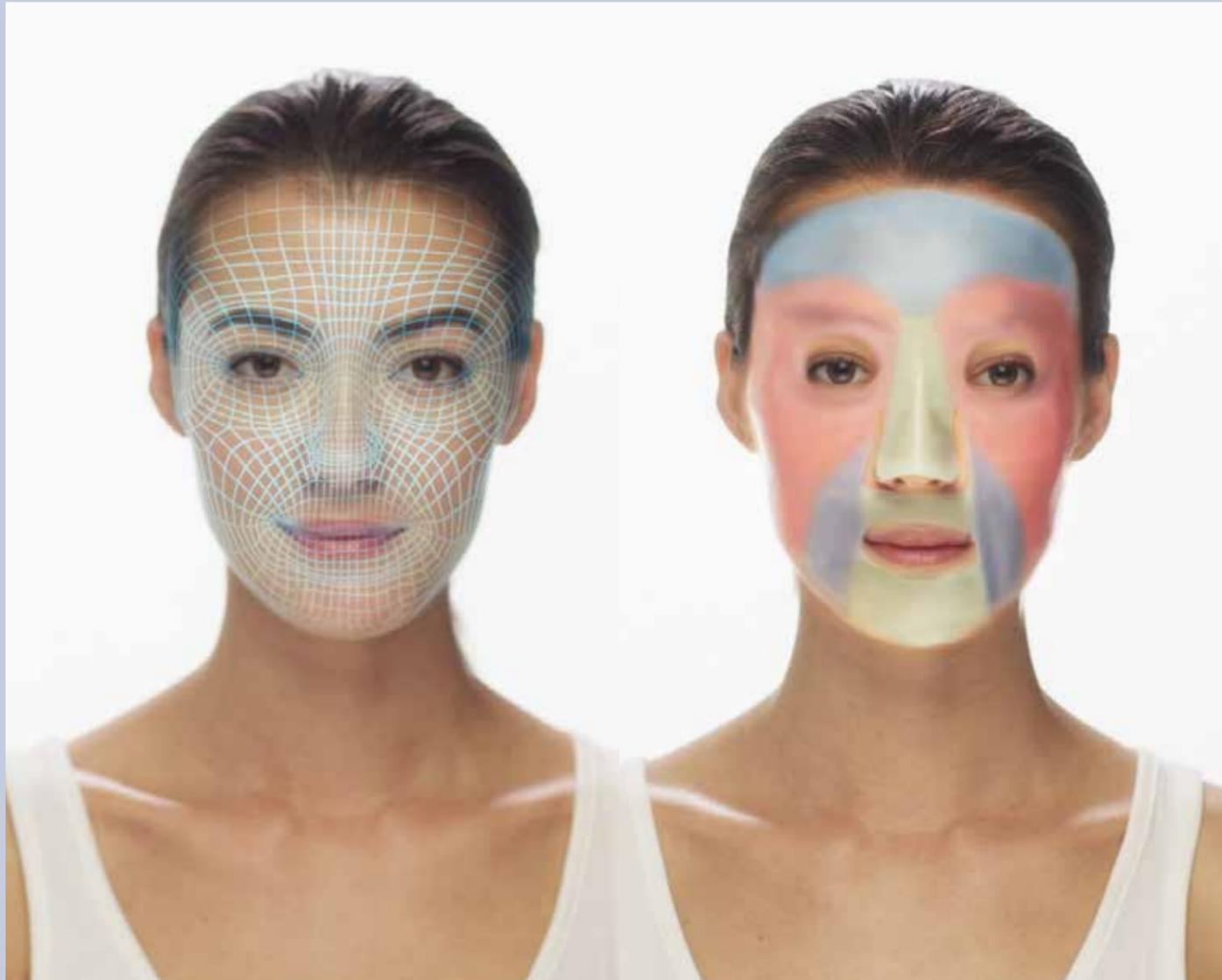
Skincare 2.0

Growing demand for hyper-personalization is driving innovation in product dosage and application.

In July 2019, Japanese luxury beauty brand Shiseido unveiled Optune, an IoT personalized skincare system. The system combines a dedicated app, where users can track skin conditions, sleep patterns, hormone levels and environmental factors, with a proprietary countertop dispenser which includes five serum cartridges. Informed by daily—or even hourly—skin analysis via the app, a combination of serums is formulated to address the user’s needs that day and doled directly into their hand for application.

Neutrogena is also rethinking how skincare products are formulated and applied for hyper-personalized results. Unveiled at the CES 2019 tech show, Neutrogena MaskiD is a 3D-printed face mask crafted specifically for each individual’s unique face shape and skin needs. The hyper-personalized, on-demand production means that the mask not only delivers active ingredients specific to the user’s needs, but also helps ensure that those ingredients are properly aligned on the user’s face.

“Using micro 3D-printing, we can actually get your exact eye alignment, your nose, your mouth, how high your forehead is,” Michael Southall, research director and global lead of beauty tech at Neutrogena, explained to *Allure*.



“The key with 3D printing is that we can put the active ingredient you want just where you need it, anywhere on the mask, as opposed to one product that you’re trying to use all over the face.”

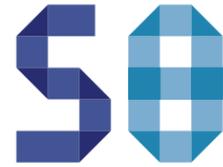
Opté is also leveraging 3D printing to reimagine how consumers apply skincare. One of the first brands to emerge from P&G Ventures, Procter & Gamble’s innovation arm, Opté combines optics, proprietary algorithms and printing technology for a new way to apply skincare products. Revealed at CES 2019,



the Opté Precision Skincare System incorporates a wand that digitally scans the user’s skin, analyzes their complexion using LED lights and an integrated digital camera to detect spots in real time, and delivers targeted serum to treat and correct the skin.

Why it’s interesting:

Technology is paving the way for a reconsidered skincare regime, ushering in a new frontier of product creation and application.



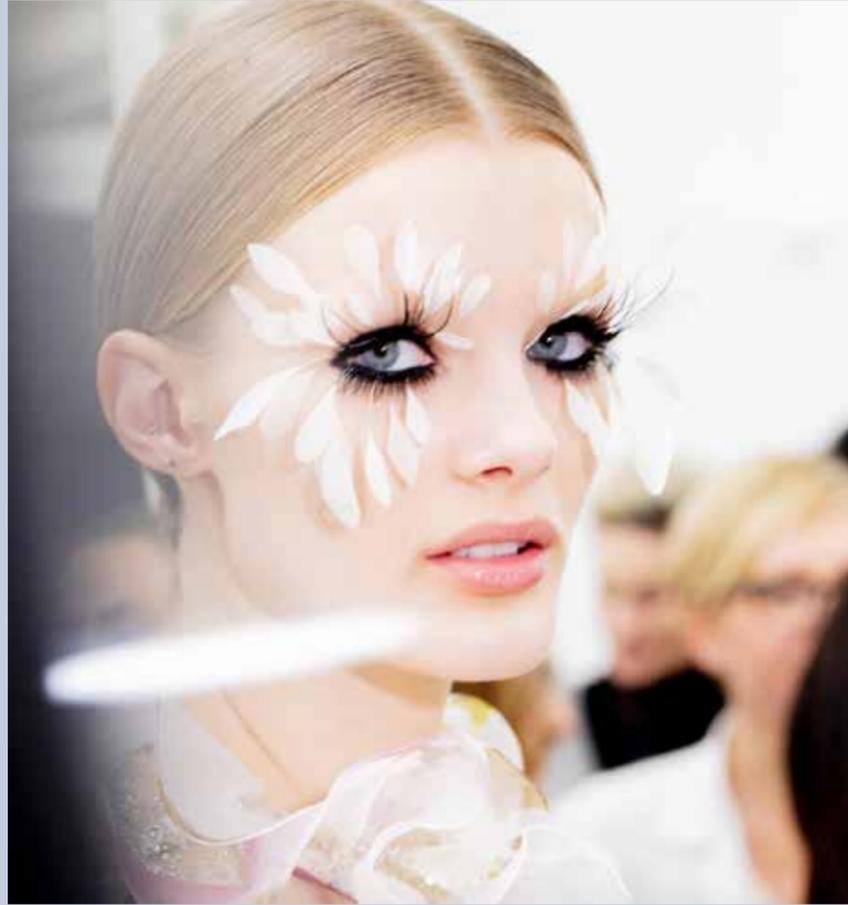
Lash out

While brows might have been the major canvas for beauty experimentation in 2019, it looks as if the lash is set to take over for 2020.

Master makeup artist Pat McGrath, whose creations are harbingers of beauty trends, executed a number of inventive lash looks at the spring 2020 shows. The 61 different makeup looks that McGrath created for the Marc Jacobs show—nodding to what she calls “an idealized interpretation of real life”—included spidery false lashes for an exaggerated, artsy take on 1960s chic. For Valentino, McGrath crafted lashes from gold in a look she dubbed Opulent Obsession. But the concept can also take an underground turn. At Gucci, makeup artist Thomas de Kluyver, who’s known for a leftfield beauty aesthetic, positioned false lashes on the brows and under the eyes, while Isamaya Ffrench, another artist renowned for experimentation, worked up punkish, clumped-together lashes for Olivier Theyskens that she refers to as “spider legs.”

This focus on lashes on the runway comes against a background of growth for the false eyelashes market. According to an October 2019 report by Grand View Research, the global false eyelashes market is set to reach \$1.6 billion by 2025, representing a CAGR of 5.4%. The report added that the false lash market in





the United States was valued at over \$400 million in 2018, and that growth of the false lash market in the Asia Pacific region is set to achieve a CAGR of 6.6% by 2025.

Why it's interesting:

Lashes offer a way of highlighting the eye that contrasts with the recent focus on brows. McGrath told *Fashionista* in a 2019 interview that “brows have taken a back seat a little bit—it’s all about the lashes.” And this focus on lashes could translate into more experimentation in the mascara category, which has been somewhat subdued in recent years, with the *Business of Fashion* wondering in 2019 whether mascara was “losing its relevance.” Could a renaissance be on the way?





Microbiome beauty

Beauty gets biological: a swathe of beauty brands are bridging biology and skincare, turning their attention to the skin's microbiome, the bacterial barrier that protects the skin.

Kinship, launched in November 2019, is the latest beauty brand to address the skin's microbiome. Kinship's products are formulated with Kinbiome, a trademarked plant-based prebiotic that supports the skin's natural barrier, developed using proprietary microbiome technology.

In the same month, SL&Co—launched by Susanne Langmuir, the founder of Bite Beauty—hit the market with a product formulated to balance the skin's microbiome. Released in November 2019, The Powder of Youth No 1 is the first product in the brand's lineup and the powder cleanser, exfoliator and mask features Lactobacillus ferment to protect good bacteria on the skin.

Nimble indie brands are not alone in driving this shift; legacy beauty companies are also throwing their weight behind microbiome research and products.

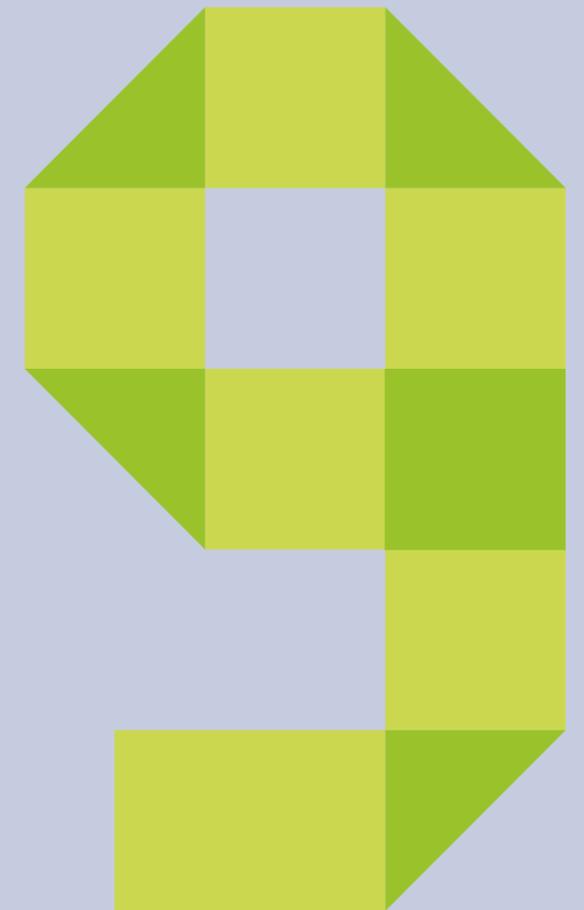
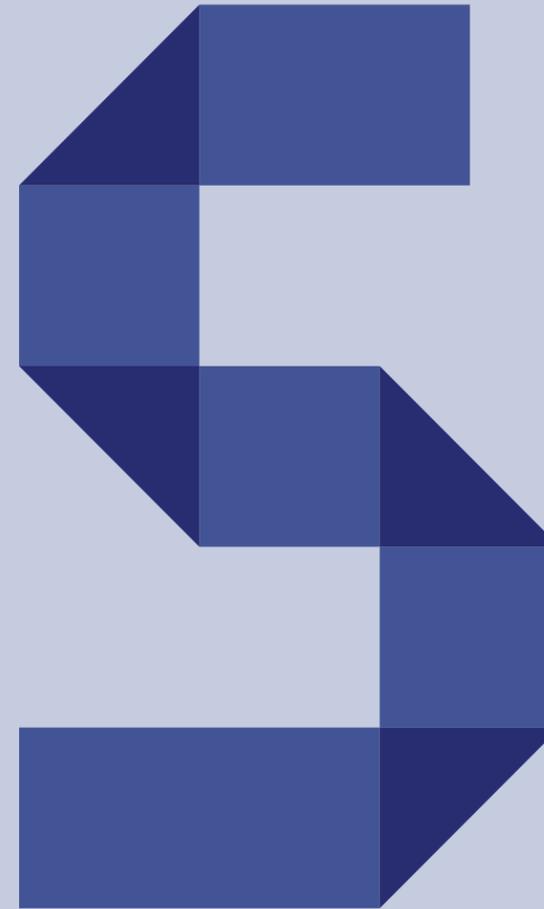


Estée Lauder has partnered with leading microbiome research company Nizo, and released findings in November 2019 that correlated skin aging with microbial composition of the skin. “The Estée Lauder Companies has been working with a probiotic culture of *Lactobacillus plantarum* and has identified several positive benefits in topical application of *Lactobacillus* extract,” says Steve Schnittger, vice president of global microbiology and fermentation research and development at Estée Lauder.

In March 2019, L’Oréal announced a new partnership with microbial genetics company Ubiome to advance microbiome research and “better understand the interplay between bacterial diversity and skin health,” Guive Balooch, global vice president of the L’Oréal Technology Incubator, tells Wunderman Thompson Intelligence. L’Oréal previously partnered with Epicore Biosystems, a startup specializing in microfluidic platforms and wearable sensors. At the CES 2019 tech show, L’Oréal debuted My Skin Track pH by La Roche-Posay, a wearable sensor that measures skin pH levels using microfluid technology developed in collaboration with Epicore Biosystems. Balooch notes that although “the scientific and medical communities have long known the link between skin pH levels and common skin concerns,” the My Skin Track pH concept takes this a step further to “empower consumers with meaningful information about their skin, so that they can find the products that are right for their individual needs.”

Why it’s interesting:

“Biology could bring skincare to a new level,” says Balooch. And as consumers demonstrate a growing appetite for a biological approach to beauty, established legacy brands and emerging startups alike are turning their attention to microbiome beauty.





Blue beauty

Cosmetics brands are turning to the oceans as their latest source of natural ingredients.

Naturally derived, sustainable skincare is increasingly popular. According to research by Hamacher Resource Group released in March 2019, 30% of skincare consumers—a percentage that skewed female and younger—had increased their natural purchases in the last year, *Global Cosmetic Industry* magazine reported. The seas are now proving a rich source of natural elements.

With part of its mission to conserve the oceans, One Ocean Beauty creates products formulated with marine-based ingredients. Founder Marcella Cacci told *Well & Good* that the process involves taking “a single cell or micro-organism out of nature, and then we regrow it in the lab through biotechnology, so it’s completely sustainable production.” Among the brand’s products are Marine Collagen capsules, made from hydrolyzed marine collagen sourced from deep-water fish, and Replenishing Deep Sea Moisturizer, with algae extract from the Sea of Japan that will “soothe inflammation and brighten the complexion,” the brand says.





“
Mindfully sourced marine-based ingredients are powerful, natural and sustainable.
 ”

Launched in August 2019, British skincare brand Freya & Bailey uses seaweed in its anti-pollution cosmetics products as an alternative way to boost collagen. Its Sail! Marine Eye Gel is formulated with seaweed algae, fruit extracts and vitamins, which support the production of collagen, the brand says.

At the ingredients level, In-Cosmetics North America 2019 saw several marine-based actives on show, as *CosmeticsDesign USA* pointed out. These included Seadermium, a skin-plumping marine active produced by LipoTrue and sourced

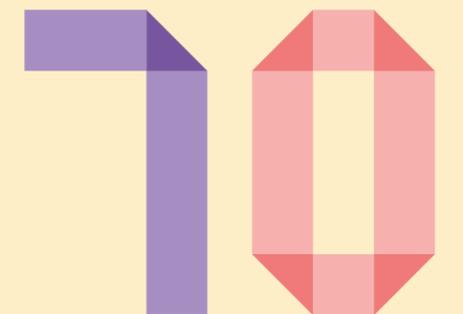
from Réunion island in the Indian Ocean. The Creanatural range by French brand The Innovation Company offers natural ingredients based on marine and plant extracts that include caviar extract and squid ink.

Why it's interesting:

Infusing skincare products with mindfully sourced marine-based ingredients unites consumers' desire for natural and sustainable products with a unique source of powerful actives—and each one has a captivating story behind it.



Retail





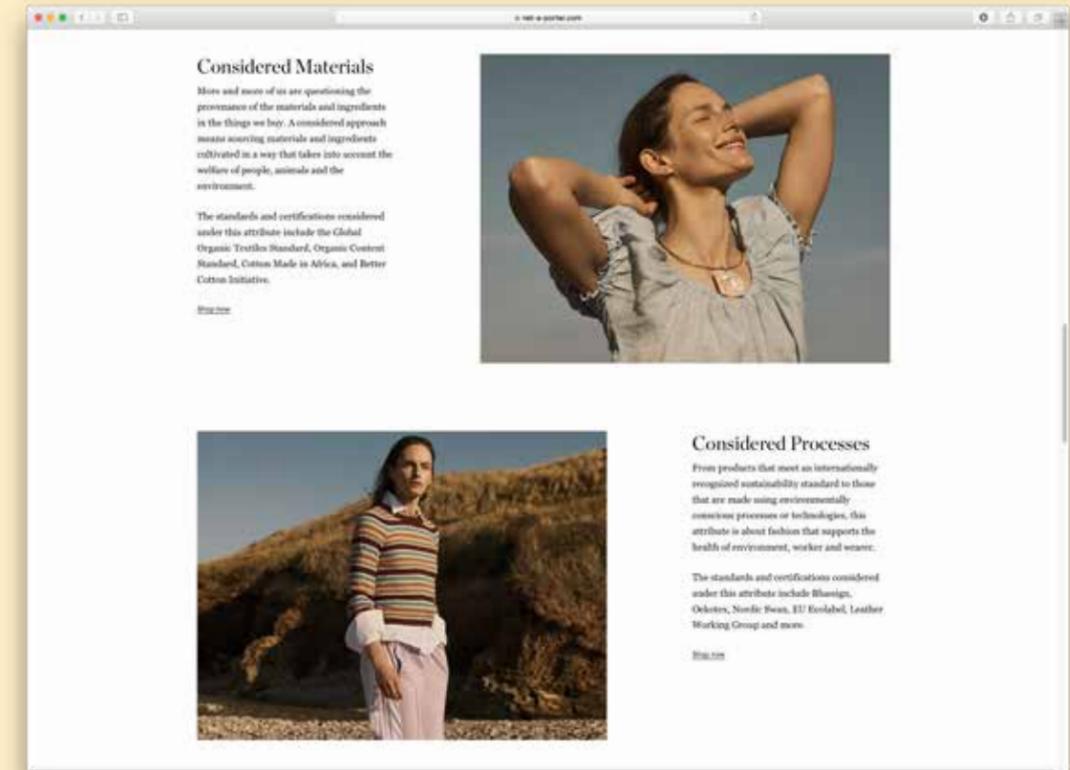
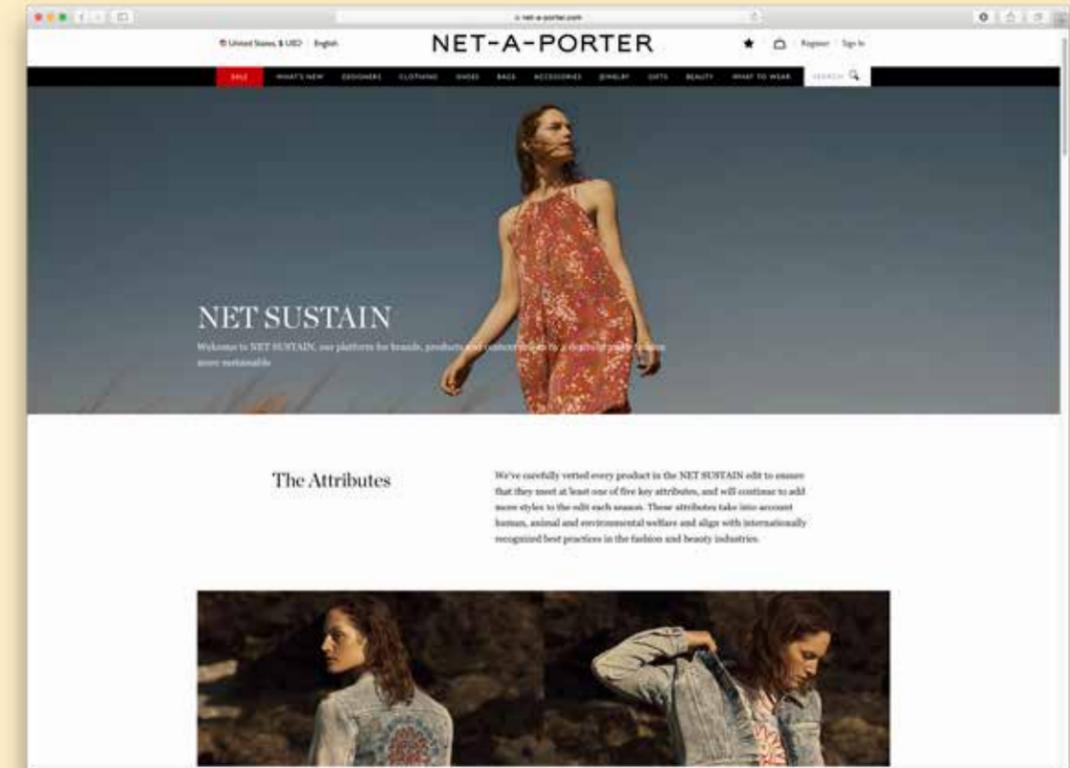
Ethical edits

Online luxury marketplaces are elevating ethics as well as aesthetics when curating their collections.

Consumers are purchasing for values more than ever. “The New Sustainability: Regeneration,” a Wunderman Thompson report published in fall 2018, finds that 83% of consumers say that, when deciding between brands, they’ll always pick the one with a better sustainability record, and 70% are willing to pay more for products and services that help protect the environment or don’t infringe on human rights. To help cater to this conscious shopping movement, a host of retailers are curating ethically driven collections.

Launched in July 2019, Buho is an ethical e-commerce hub offering a curated selection of brands that prioritize sustainable practices, gender equality and fair trade. Buho works with carbon-neutral shipping partners, and uses fully compostable packaging and plantable seed tags for its consciously crafted homeware and products for men, women and kids.

In June 2019, luxury fashion online retailer Net-a-Porter launched Net Sustain, a new vertical dedicated to sustainable brands. The 26 brands and over 500





products in the edit meet at least one of five sustainability related requirements set out by the retailer—these cover human, animal and environmental welfare.

“Our sustainable edit provides our customers with the knowledge they need, understanding that they can trust that these brands have been carefully reviewed and meet our criteria for inclusion,” says Elizabeth von der Goltz, Net-a-Porter’s global buying director. “Our aim is to give a voice to the brands that are truly making positive changes by providing them with a platform to highlight their best practice.”

In June 2019, luxury fashion veterans Dexter and Byron Peart launched Goodee, a luxury marketplace that refines sustainable retail with a principled and story-forward approach. “We don’t just want people to shop, we want to cultivate a purpose-driven conversation,” Dexter Peart tells Wunderman Thompson Intelligence. “People now want to make better choices in their lives and we have created an opportunity for people to engage.”

Goodee’s goal is to show consumers that sustainable and design-forward don’t have to be mutually exclusive terms. “We want to change the narrative of organic and sustainable consumer purchases as being a trade-off against owning beautiful things. We felt like there needed to be a more modern approach to sustainability, to present it in a more appealing, digestible way,” Byron Peart explains to Wunderman Thompson Intelligence.

Why it’s interesting:

Consumer are increasingly seeking out brands whose values align with their own. In response, retailers are tailoring their products and platforms to showcase ethics and help consumers shop purposefully.





Anti-excess consumerism

As skepticism about influencers and awareness of environmental damage rise, shoppers are consciously stepping back from the ledge of excess consumer culture.

Beauty bloggers, whose very existence and success has previously hinged on reviewing the latest products and releases, are starting to actively denounce the beauty industry's endless cycle of new products. One beauty YouTuber is taking a radical stance; Samantha Ravndahl, who as of January 2020 had amassed 976,000 subscribers, has asked brands to stop sending her PR packages and free products to review. "Every time a new product was sent to me, I'd look at it and think, 'Well, it's here, it's new, I might as well review it,'" Ravndahl explained to the *Cut*. "I wouldn't want to be told to buy something new when just last week, I'd been told to buy something else that was really similar. That's not realistic, and that's not how people buy makeup. It's certainly not how I'd buy makeup."

Review culture is not only impractical, short-sighted and even anxiety-inducing—beauty consumers are also increasingly uncomfortable with the excessive waste it generates. "What pushed it over the edge," said Ravndahl,

“was the physical waste. I live in a household of eight people, and the waste that I alone created was more than the others combined.”

The beauty community is echoing this sentiment. Ravndahl received overwhelmingly positive feedback on her decision to cut back, with one viewer commenting, “Thank you SO much for this. Unfortunately the beauty community thrives on buying more, more, more and it’s not a healthy trend.”

Elsewhere on the internet, beauty junkies are flocking to popular online community Reddit to support each other in the decision to purchase less. The thread r/MakeupRehab, which had over 75,000 members as of January 2020, sees many former members of the thread r/MakeupAddiction banding together to encourage conscious consumption.

The anti-excess movement is also taking root in the fashion industry. The secondhand clothing market is on track to reach sales of \$43 billion by 2022, according to the “ThredUp 2019 Resale Report” compiled for ThredUp by Global Data, and is particularly strong among the key millennial and generation Z markets, which are adopting secondhand apparel two and a half times as fast as other age groups. The secondhand luxury goods market is even growing faster than the primary market; the 2019 BCG-Altgamma “True-Luxury Global Consumer Insight” study estimates that luxury resale will grow at an average annual rate of 12% through 2021, compared to the 3% growth rate for the primary market over the same period.

Brands and retailers are pivoting in response: in November 2019, Selfridges opened a permanent space for luxury clothing resale platform Vestiaire Collective, following a pop-up for Depop, the peer-to-peer second-hand marketplace, from August through October 2019.



“We have had the most insane excess,” Orsola de Castro, cofounder and creative director of Fashion Revolution, a British non-profit that campaigns for global supply chain transparency and responsibility, tells Wunderman Thompson Intelligence, “so it makes sense that we’re questioning it.”

Why it's interesting:

The archetypal insatiable consumer is becoming an outdated relic of the 20th century as consumers turn a more discerning eye on purchasing. “Millennials and gen Z are disrupting the market and placing greater importance on the social and environmental impact of their purchases than previous generations,” notes Vestiaire. Rising generations are buying with less frequency and more mindfulness, creating a better model for consumerism, so brands should be cautious of pushing products mindlessly—they risk appearing blindly greedy and out of touch.



AR(etail)

Retail experiences are being reimaged by advances in augmented reality (AR), creating new windows for discovery.

More brands are investing in AR's boundless potential for creating immersive shopping landscapes. In New York City, Italian furniture house Natuzzi has followed Ikea's lead and opened a showroom where shoppers can wear Microsoft's HoloLens 2 headset to enter an augmented version of their own home. They can fill this virtual version with Natuzzi pieces, easily customizing patterns and colors.

"It gives them a sense of place and mood that's almost as real as a physical furniture display, and the experience helps them form an emotional connection to their choices," creative director Pasquale Junior Natuzzi told *Dezeen*.

Kohl's is the latest in a line of brands, from Gucci to Gatorade, to harness Snapchat's Portal AR Lens. For a limited time in November 2019, customers could access the retailer's virtual holiday pop-up boutique and shop labels like Jason Wu, Vera Wang and Lauren Conrad by clicking on the merchandise to access Kohl's online store.

In the long-term future of AR glasses—and later contact lenses—our eye view will become our screen.

Neha Singh, founder, Obsess

Then there's Obsess, a dynamic online shopping platform developed by *Vogue's* former head of product Neha Singh. Obsess ditches the 2D thumbnail images featured on most online shops. Its multiple CGI-powered, 3D virtual worlds range from luxurious apartments to natural landscapes, each containing themed shoppable product lines.

In China, Armani has become the first global luxury brand to employ AR on a mass scale via a WeChat Mini Program. Through a partnership that draws on L'Oréal's ModiFace technology, Armani's cosmetic customers can use their WeChat app to virtually try on makeup at home and make immediate purchases. Alibaba has also heavily invested in AR for its beauty consumers on the Tmall e-commerce portal, giving brands like Tom Ford Beauty and MAC the tools to help online shoppers virtually test out makeup products in their online flagship stores.

Offline, Swarovski brought its AR try-on experience to Chinese customers in its Chengdu store in spring 2019, following its London debut. Shoppers entering



the boutique encounter multiple mirror-like interactive screens that let them virtually wear crystal-encrusted jewelry, in a similar vein to Sephora's AR-powered makeup counters.

In June 2019, Shenzhen-based tech startup Coolhobo demonstrated just how the future of AR-powered retail could look. Its winning concept for Google and JD.com's China AR competition showed how customers at Walmart's bricks-and-mortar store could use AR navigation to pick up everything on their shopping lists by following floating arrows that point the way to each item. Along the way, they encounter product information and friends' recommendations in real time, and interact with brands via fun, immersive games.

Coolhobo founder and CEO Loïc Kobes tells Wunderman Thompson Intelligence that investment, research and development that takes new AR to the next level would mean "giving the camera the ability to understand our physical world, like a 3D GPS, accurate within centimeters." The camera, he explains, would know what it was looking at, just as humans do. "That will massively impact retail, especially physical stores."

Why it's interesting:

Right now, most retailers are experimenting with AR in one-off projects, but with the rollout of 5G, AR shopping experiences could reach uncharted levels of immersion, giving new depth and meaning to the merging of the online shopping experience with IRL. Singh told *Vogue* her predictions: "In the long-term future of AR glasses—and later contact lenses—our eye view will become our screen. Digital information and objects will often be indistinguishable from physical objects, and a new layer of digital fashion will emerge where items won't need to be manufactured physically, but will be 'worn' in this AR realm virtually."

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Subscription goes east

Subscriptions are no longer just for news and gyms.

The ecosystem for a subscribed life may be most advanced in Japan, where you can now subscribe to everything from bar drinks to hair and beauty treatments, cars, suits and even stays in charming rural homes.

Subscription used to mean committing to pay in advance for an agreed number of uniform products, in exchange for convenience and bulk savings over time. Now more imaginative subscription models are building variety into their packages, in some cases blurring the lines between purchase and rental.

In Japan, Toyota launched a car subscription service called Kinto in February 2019. Kinto One, the basic plan, lets consumers “own” a Toyota for three years and then return it, for a single price that includes insurance and maintenance. The premium Kinto Select plan, aimed at younger drivers looking for variety, lets subscribers “own” and “try” six Lexus cars over three years.

In Japan’s famously formal work culture, a subscription service called Kirudake offers fuss-free working wardrobes for corporate clients. The plan starts at 4,800 yen a month (around \$40), which covers two suits, one for summer and





A new generation is embracing subscriptions, even for big-ticket items, to achieve convenience and affordability.



one for winter. Garments are individually hemmed and adjusted to fit each member, and shirts and ties can also be included.

The subscription world has mushroomed to a point where Kirudake, along with some 100 other subscription services, is part of an umbrella super-subscription service called Oyo Passport, which offers an added layer of savings for dedicated subscribers.

Another recent entrant to the subscription game is responding to problems associated with Japan's super-aging population. Almost a third of the country's population is over 65, according to 2018 government figures cited by the World Economic Forum, and 2.3 million Japanese people are aged 90 or older.

When old people die, their homes are often left vacant, especially in rural areas. ADDress, a subscription service version of Airbnb launched in April 2019, is one answer to rural depopulation. Users sign a one-year contract and pay a fixed monthly rate of 40,000 yen (around \$360) to live in any listed property (a single

month's subscription is available for 50,000 yen, or around \$450). The homes are often in bucolic locations, and come with a local "guardian" who imparts living and sightseeing tips, and keeps common areas in the homes clean.

ADDress president Takashi Sabetto writes on the company website that he believes having just one address is "a thing of the past," adding: "I hope you will work together to create a society that protects and takes advantage of the rich nature of Japan, old houses and local goodness." The service, with its community-building aspect, has gained the attention of big brands. All Nippon Airways recently announced a collaboration where the airline offers low fares to ADDress members.

Why it's interesting:

A new generation is embracing subscriptions, even for big-ticket items, to achieve convenience and affordability. This new iteration of subscriptions differs from previous models in that it's flexible enough to allow consumers all the variety they seek.



New shopping worlds

From streaming channels to virtual landscapes and games, immersive retail has reached new heights for the next generation of shoppers.

E-commerce platforms are exploring innovative ways to make their content enticing and their products come to life. In China in October 2019, Alibaba's Taobao Life launched a 3D avatar game aimed at generation Z. Users can customize their character's outfits with luxury streetwear apparel and accessories that are also available for purchase on the platform. Soon after the launch, Chinese pop idol Dong Youlin posted photos of himself on social media wearing the same MSGM sweatshirt and Iceberg pants as his Taobao avatar, kicking off a viral frenzy on Weibo.

"The market is going to continue to get younger and these young consumers are inundated with brand messaging," China social media and marketing expert Lauren Hallanan tells Wunderman Thompson Intelligence, describing the future of social gaming and commerce as a retail channel. "Games are a way to draw them in and keep them engaged."

Popular PC video game *The Sims* inspired Moschino's creative director Jeremy Scott to create a ready-to-wear line. Featuring prints based on the game's

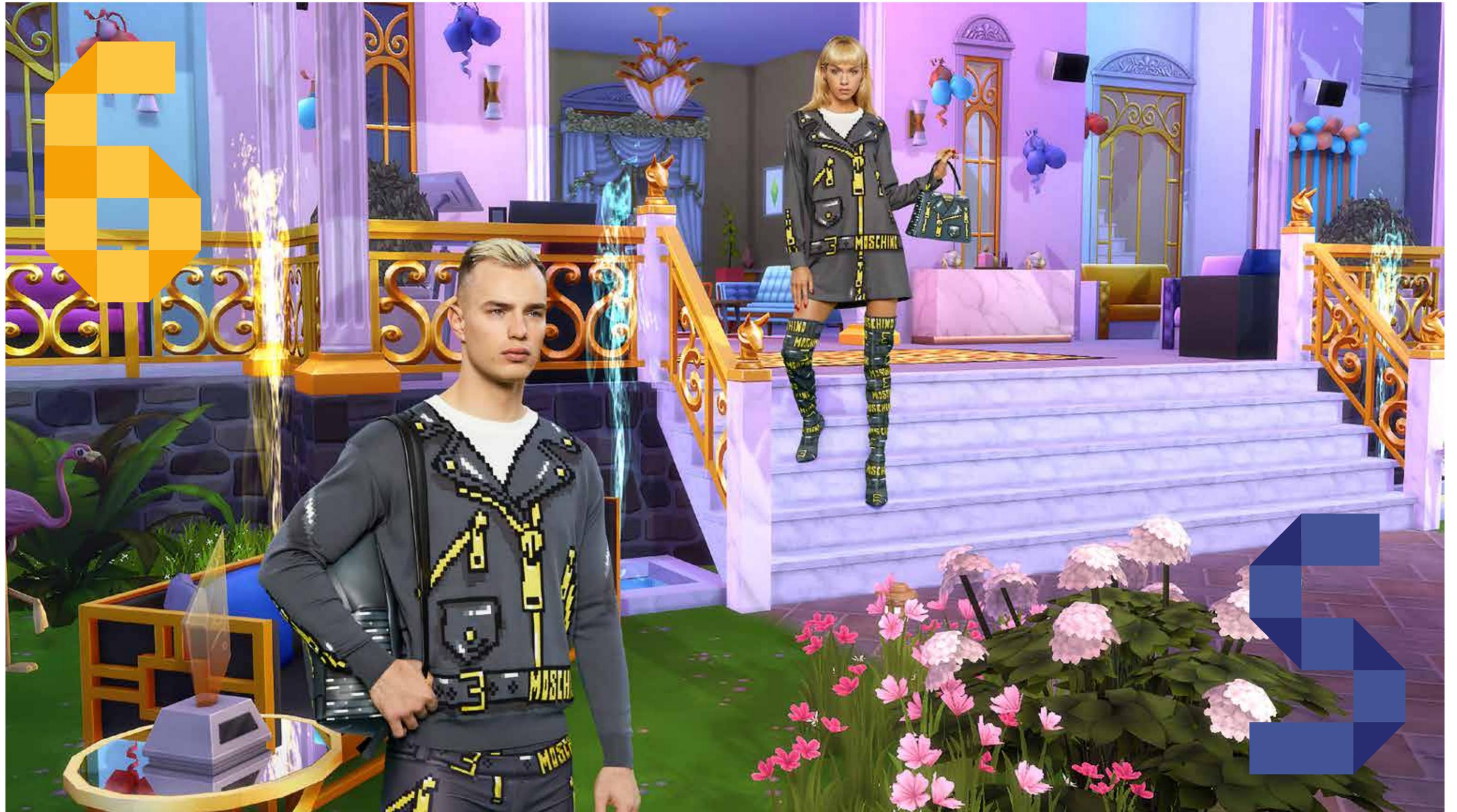
Plumbob symbol, denim wear, and a hoodie branded with the Freezer Bunny character, the collection was released in spring 2019 and was available both IRL and digitally within the game, as part of the avatars' wardrobe.

Streaming experiences have also expanded into uncharted spaces. Just months before Victoria's Secret announced it was canceling its annual live fashion show, Rihanna's Savage X Fenty brand collaborated with Amazon to stream its New York Fashion Week runway on Amazon Prime, giving the video service's members the opportunity to shop the lingerie collection without leaving the platform.

Why it's interesting:

Global brands are embarking on unconventional partnerships that blend worlds to create innovative retail discovery experiences for a young cohort of mobile-first and digital-native shoppers. Successful retailers will meet gen Zers and millennials wherever they are, whether it's in a virtual game or on new streaming platforms.





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New beauty playgrounds

As experience culture cuts a swathe through retail, there's perhaps no sector better suited to a hands-on moment than beauty.

No matter how alluring a product might appear online, there's no substitute for consumers being able to test out shades or try a new texture IRL. In April 2019 the *Business of Fashion* cited research from Piper Jaffray that showed around 90% of American teenagers still preferred to buy cosmetics in stores. While e-commerce sales account for an ever greater share of consumer purchases, "beauty is the only category where bricks-and-mortar's share hasn't fallen," says Erinn Murphy, principal and senior research analyst at Piper Jaffray.

With that in mind, brands are ramping up their in-store beauty experiences, and reimagining them as veritable playgrounds.

In October 2019, Harrods announced the launch of its H Beauty standalone beauty concept, with the first store set to open at the UK's Intu Lakeside shopping center in Essex in April 2020. *Retail Gazette* reported that the store will span 23,000 square feet and offer services such as a "coffee-to-cocktail"





bar, and blow dry and facial treatments. Brands will include Chanel, Dior, Huda Beauty, and others new to the retailer. “H Beauty is an opportunity to bring our mission to more beauty lovers across the UK,” says Annalise Fard, Harrods home and beauty director. “We are on a mission to show the world the art of what is truly possible in the world of beauty today.” Harrods has also announced it will open its second UK H Beauty store in Milton Keynes.

After Beauty, which opened in fall 2019 on London’s bustling Piccadilly, describes itself as a “beauty playhouse.” The extensive three-story space carries 140 brands, including SkinCeuticals, Dermalogica, Holika Holika, and Patchology. “After Beauty was founded to bring fun and excitement back to the beauty industry,” cofounder Zanelle Lim told *Get the Gloss*. “We wanted to create a destination for beauty obsessives to lose themselves in a world of products, color and creativity. Customers have a better understanding of products now than ever before, so we want them to throw out the rulebook and discover new things.”

The trend is taking hold globally. In October 2019, e-commerce platform Grove Collaborative launched clean beauty concept store Roven on Abbot Kinney Boulevard in Los Angeles, as a sub-brand to its core natural home products business. *Beauty Independent* described the store’s design as “a study in pastels enhanced by soft edges” that incorporates “a lot of good vibes, and eye-catching colors and curves.” Roven cofounder Nicole Farb told *Beauty Independent* that “the ability to touch and feel the brand is more powerful than we would have expected.”

In Seoul, Villa de Mûrir is described by Collective B, the design studio behind the concept, as a “beauty curation brand.” The store is at once futuristic and cocooning, decked out in millennial pink and terrazzo stone, and offers Villa de



Mûrir’s own line as well as products from other leading beauty brands. The space also includes a production studio “for YouTube and social media content creators,” the *Coolhunter* reported, alongside treatment rooms and a café.

Why it’s interesting:

Beauty retailers are clearly listening to research that points to generation Z’s love of IRL shopping. According to data released by AT Kearney in September 2019, 81% of 14-24-year-olds surveyed preferred to shop in stores, with some using it as a way to disconnect from social media and the digital world, while 73% said they liked to discover new products in stores. These new beauty environments are being conceived as welcoming, warm spaces that invite the consumer to play, experience and, of course, buy new products.



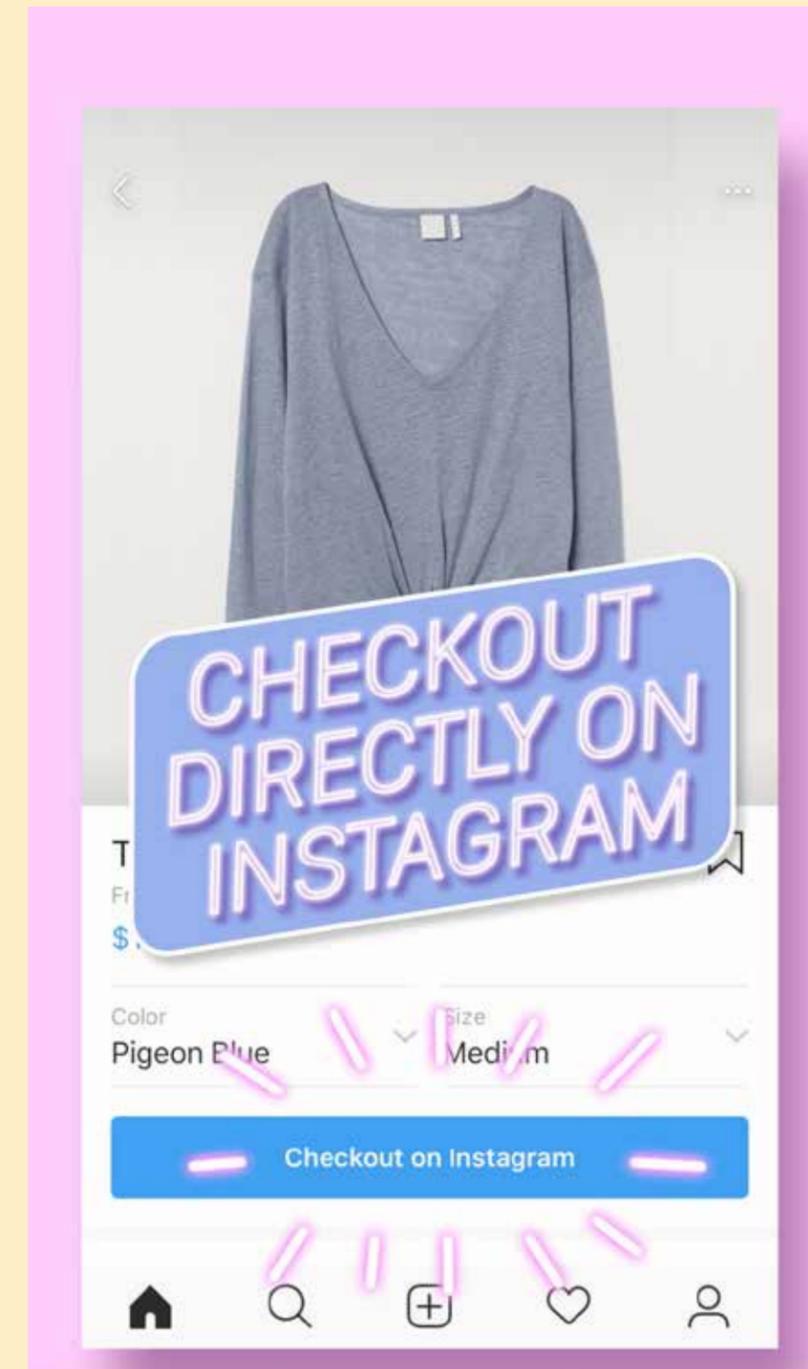
Uninterrupted commerce

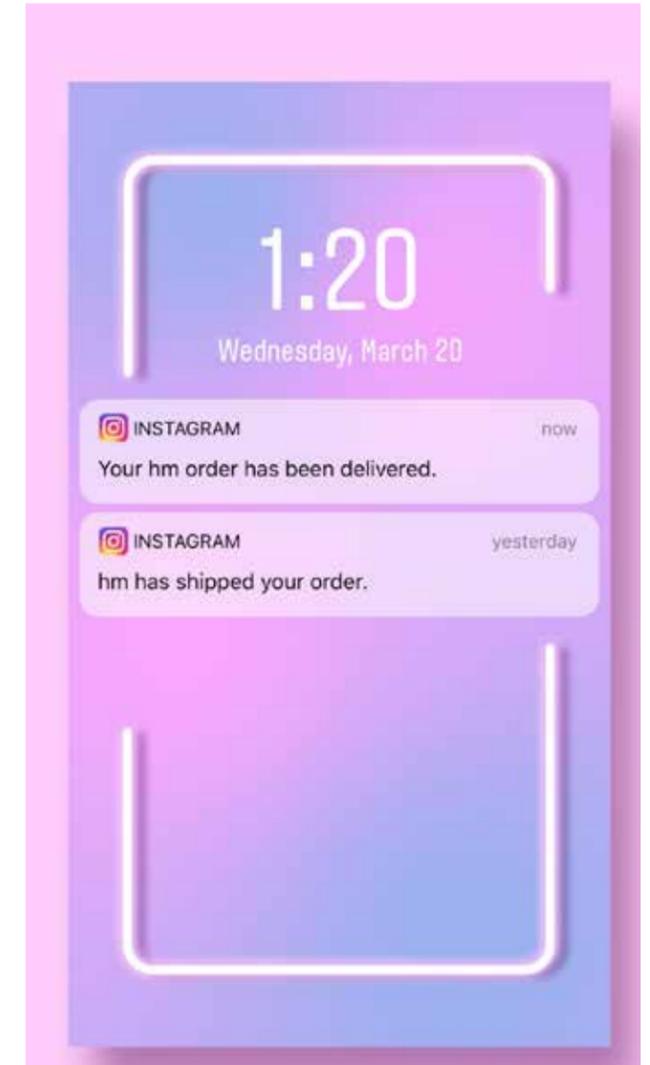
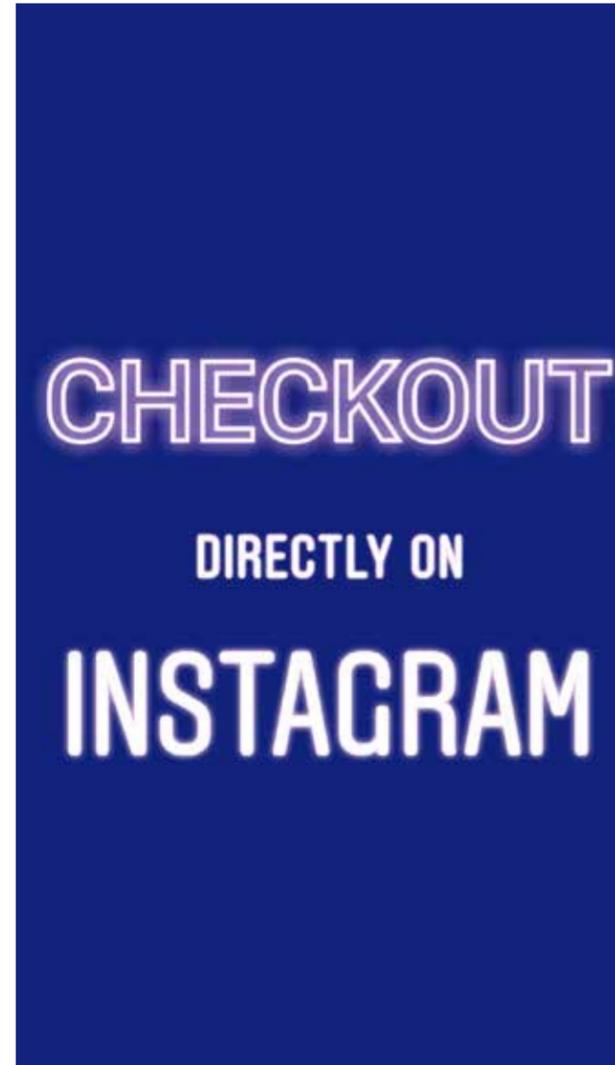
From social media to search engines, consumers can shop just about anywhere online and the process is becoming more seamless than ever before.

Instagram is on its way to becoming a one-stop shop for brands thanks to the launch of Checkout in spring 2019, and enthusiasm around native commerce on the platform only seems to be accelerating. *Glossy* reported in November 2019 that brands such as Joe's Jeans and SoulCycle are working with Instagram influencers and collaborators to sell their apparel through the Checkout feature, and have achieved overwhelmingly positive results so far.

Hot on Instagram's heels, Google introduced an update in October 2019 that allows users to shop and make purchases from thousands of vendors directly through its search engine. Consumers can also use Google Shopping to locate an item they're looking for at a nearby store, track the price of a product, and receive personalized shopping recommendations.

With extensive e-commerce capabilities already in place in China, TikTok is experimenting with in-app e-commerce in the United States. In China, brands can link to stores both inside and outside of the short video platform, and nearly every other Chinese social media site has its own built-in e-commerce platform, from Xiaohongshu to generation Z favorite Bilibili.





“This state of affairs in China is very advanced,” Elijah Whaley, a brand growth and influencer marketing expert in China, tells Wunderman Thompson Intelligence, adding that consumer sentiment towards online shopping as entertainment will continue to fuel a completely integrated content to commerce experience.

“Sixteen-year-old girls aren’t going to the mall necessarily anymore, but sitting on their phones and flicking through online stores or watching e-commerce live streams or direct to commerce content,” he says. “For the right demographic,

online shopping is the new going to the mall for entertainment and hanging out.”

Why it’s interesting:

According to Instagram data, 130 million users tap on shopping posts every month. Consumers are undoubtedly using Instagram and other online content spaces for product discovery, and brands can leverage this by working with influencers to remove the pain points in the purchasing experience.



Death of the luxury department store

A string of long-established big-name department stores has folded under staggering levels of debt and bankruptcy, which begs the question: what does the future of luxury retail look like?

Business Insider has calculated that more than 9,000 individual stores closed in the United States in 2019. This is unsurprising given that bricks-and-mortar retail revenue is plummeting across the world. US department stores experienced a dramatic 30% drop in sales between 2007 and 2017, according to US Census Department retail figures, and Morgan Stanley has predicted that department stores will account for just 8% of the apparel market by 2022, down from 24% in 2016.

Barneys declared bankruptcy in August 2019 and in November 2019 announced that it would officially close. “The entire industry is in survival mode,” Daniella Vitale, then Barneys CEO, told employees earlier in the year, according to a recording obtained by CNBC. “The model is not working,” she said, adding that it’s not working for Neiman Marcus, “it’s not working for Saks, it’s not working for us, it’s not working for Nordstrom.”

In November 2019, LVMH purchased renowned but diminished Tiffany & Co, whose prestige and Hollywood heritage were no longer enough to keep it afloat on its own.

In January 2019, Lord & Taylor’s Fifth Avenue flagship—which first opened in 1914—shut its doors for good. The store had completed a \$12 million renovation just over 18 months before. Struggling parent company Hudson Bay, which also owns Saks Fifth Avenue, then sold the retailer to Le Tote in November 2019.

Henri Bendel officially shut down in January 2019 after 123 years in business, and bankruptcy could be looming for Neiman Marcus, which in March 2019 reached a deal with creditors to restructure its \$5 million debt.

These struggles are symptomatic of a larger shift in the luxury retail landscape. According to research from Expedia and the Center for Generational Kinetics, 74% of Americans value experience over products. Legacy retailers such as Nordstrom and Selfridges are pivoting to the experience economy with workshops, cultural programming and pop-ups, while newcomers like Showfields are blurring the lines between art, commerce and experience, turning shopping into an immersive and multisensory experience.

When they do shop for products, idealistic and principled generation Zers and millennials are looking for brands that align with their beliefs. According to research by Bain, this group is driving 85% of luxury sales growth globally and is expected to constitute 45% of luxury shoppers by 2025. A survey by SONAR™, Wunderman Thompson’s proprietary research tool, found that 83% of consumers always pick the brand with the better sustainability record, and 70% are willing to pay more for products and services if they protect the environment or don’t infringe human rights.



The entire industry is in survival mode. The model is not working. It's not working for Saks, it's not working for us, it's not working for Nordstrom.

Daniella Vitale, former CEO, Barneys

“It’s very hard now for a company not to stand for something,” said Vanessa Friedman, *New York Times* fashion director and host of the newspaper’s international luxury conference. “People buy things not just because they are pretty but because they represent something more.”

Byron Peart, cocreator of e-commerce platform Goodee and cofounder of luxury accessories brand Want Les Essentiels, echoes this sentiment. “The brands of the future will be rooted in purpose,” Peart tells Wunderman Thompson Intelligence. “There is a change in real time about how luxury is

defined. Whereas it previously fell under a price and exclusivity matrix, we think it will shift towards drive and purpose.”

Why it’s interesting:

In a climate where status is increasingly cued by values and purpose in place of price and prestige, the luxury retail category is undergoing a seismic shift. Luxury department stores of yore no longer resonate with modern consumers, who are willing to pay for experiences and ethics. As Peart says, “good design and purpose will become the arithmetic to luxury.”

69

Next-gen retail spaces

With much of their lives spent on social media, millennials regard design values as being of paramount importance—and they have high design expectations on behalf of their offspring too.

In major cities across the globe, various aspirational children's spaces have been devised in striking contrast to the primary colors and wipe-clean surfaces that have long dominated play areas.

In China, the Loong Swim Club in Suzhou is a soothing space designed by Shanghai architecture firm X + Living. It has been imagined in soft tones of pink and blue, and has circular lighting fixtures that emit a pleasant, diffused glow. It's more than just a pool: a library space is decked out with inviting, lozenge-shaped curved seating, and its café borders on the fantastical, with ornate, egg-shaped domes, a mirrored ceiling and polka-dot floors. It's a space that's equally appealing to parents and children—a rarity in design aimed primarily at kids.

In New York, the Wonder is a family members' club that opened in the Tribeca district in 2019. Its interiors are bold—tones of red, yellow and blue abound—and carefully designed, with a café and a coworking space for parents







alongside play and activity areas. “Our vision, ultimately, is to be that voice for a new generation of parents,” cofounder Noria Morales told media company PSFK. “The whole idea or perception around parents is so outdated. It’s more diverse. We’re interacting with our kids in different ways. We’re spending more time with our kids than ever.”

Restaurants for children are taking on a chic identity. In Dubai, White and the Bear is a children’s eatery imagined in black and white, with pale wood furniture and fixtures. Sneha Divias Atelier, which designed the space, told *Dezeen* that it chose a palette that would not “overstimulate the senses,” adding that “the color scheme promotes creativity, imagination, and learning.”

In Dalian, China, Wutopia Labs devised Lolly-Laputan café as “an imaginary fairyland,” *Dezeen* writes. The design is fantastical and playful, yet with a hushed, refined color palette. A steel slide sits over a pit filled with white balls, there’s a carousel in stark white and gold, and there’s a café with pale, Scandinavian-style wood tones.

Why it’s interesting:

These design-led spaces appeal to the exacting tastes of millennial parents, whose children are part of generation alpha. Born between 2010 and 2025, this emerging generation is driving its parents’ purchases: according to a July 2018 Wunderman Thompson Intelligence study of gen alpha parents, 81% of US millennial parents say the habits of their children influenced their last purchase. These children value time spent in physical spaces as much as in the digital world. In a 2019 report on gen alpha, Hugh Fletcher, head of thought leadership (EMEA) and UK marketing at Wunderman Thompson Commerce, advised that whatever brands start doing now “needs to be built around what gen alpha customers expect.”



The super-convenient superstore

Chinese grocery giants are diversifying, developing a hybrid retail model to appeal to a wider range of lifestyles.

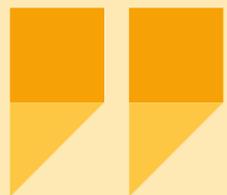
Hema Fresh, the supermarket from China's Alibaba, opened in 2017, targeting smartphone-savvy young shoppers with a gamechanging blend of digital commerce and bricks and mortar. By July 2019 the fresh food retailer had 160 stores across 21 cities in China. According to NACS, it aims to penetrate yet more locales and to deepen its online-to-offline ecosystem. Part of this strategy includes developing new sub-brands that are tailored to specific consumer groups in different regions.

At the end of 2019 there were four Hema sub-brands. The original high-tech Hema is aimed at convenience-seeking millennials in first-tier cities. In July 2019, Alibaba launched sub-brand Hema Mini, which sells unpackaged fresh produce in a format catering to older, price-sensitive, suburban shoppers—the parents and grandparents of Hema's original target customers—who would otherwise shop at their neighborhood vegetable market. Hema F2 stores stock ready-to-eat deli items and snacks geared toward office workers in business





To achieve a truly seamless online-to-offline experience, big chains are adapting their business models across different locations to cater to specific communities.



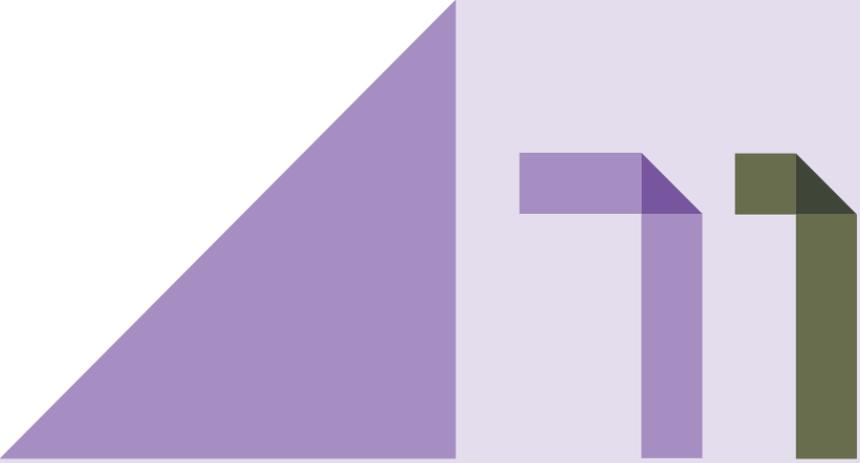
districts. Hema Market, positioned near large residential communities, offers daily staple foods. Hema Station is a delivery-only hub located mainly in areas that lack a physical Hema retail store.

Other chains are developing similar models. In September 2019, electronics retail giant Suning acquired an 80% stake in supermarket chain Carrefour China; that month it announced plans to transform Carrefour stores into integrated online-to-offline supermarkets and to introduce smaller versions of its electronics stores in 200 of the supermarkets, based on each outlet's location and customer profile. Café chains Luckin and HeyTea offer several online-to-offline formats tailored to different lifestyles, from pick-up only spots to more upscale coffee and tea bars.

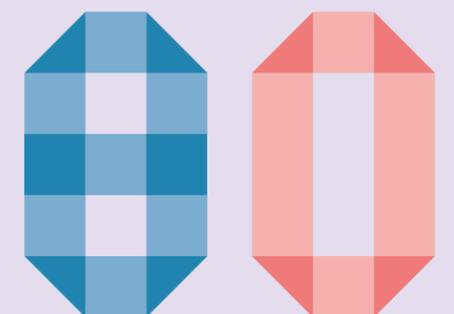
Tencent-backed Yonghui Superstores launched its Super Species brand in 2017, a high-end offering with a cook-to-order service. This was followed in June 2018 with opening of a Guangzhou Super Species outlet with fresh food delivery by drone.

Why it's interesting:

Retail expansion in China used to depend on targeting the booming smaller cities. Yet digitized customers and supply chains have changed the retail landscape. To achieve a truly seamless online-to-offline experience, big chains are adapting their business models across different locations to cater to specific communities.



Luxury





Retro gaming retail

Luxury brands are tapping into millennials' affinity for nostalgia and adventure by borrowing from vintage video games.

Louis Vuitton, never shy of dabbling in the world of games, released a retro-inspired, 16-bit video game called *Endless Runner* in July 2019. Inspired by Virgil Abloh's fall/winter 2019 collection, the game is free to play via the Louis Vuitton website and harks back to a 1980s lo-fi blocky aesthetic with simple gameplay. There are no product pushes or redirects to shop embedded into the game; first and foremost, it is intended to entertain. The game is familiar, accessible and, like most video games, extremely addictive.

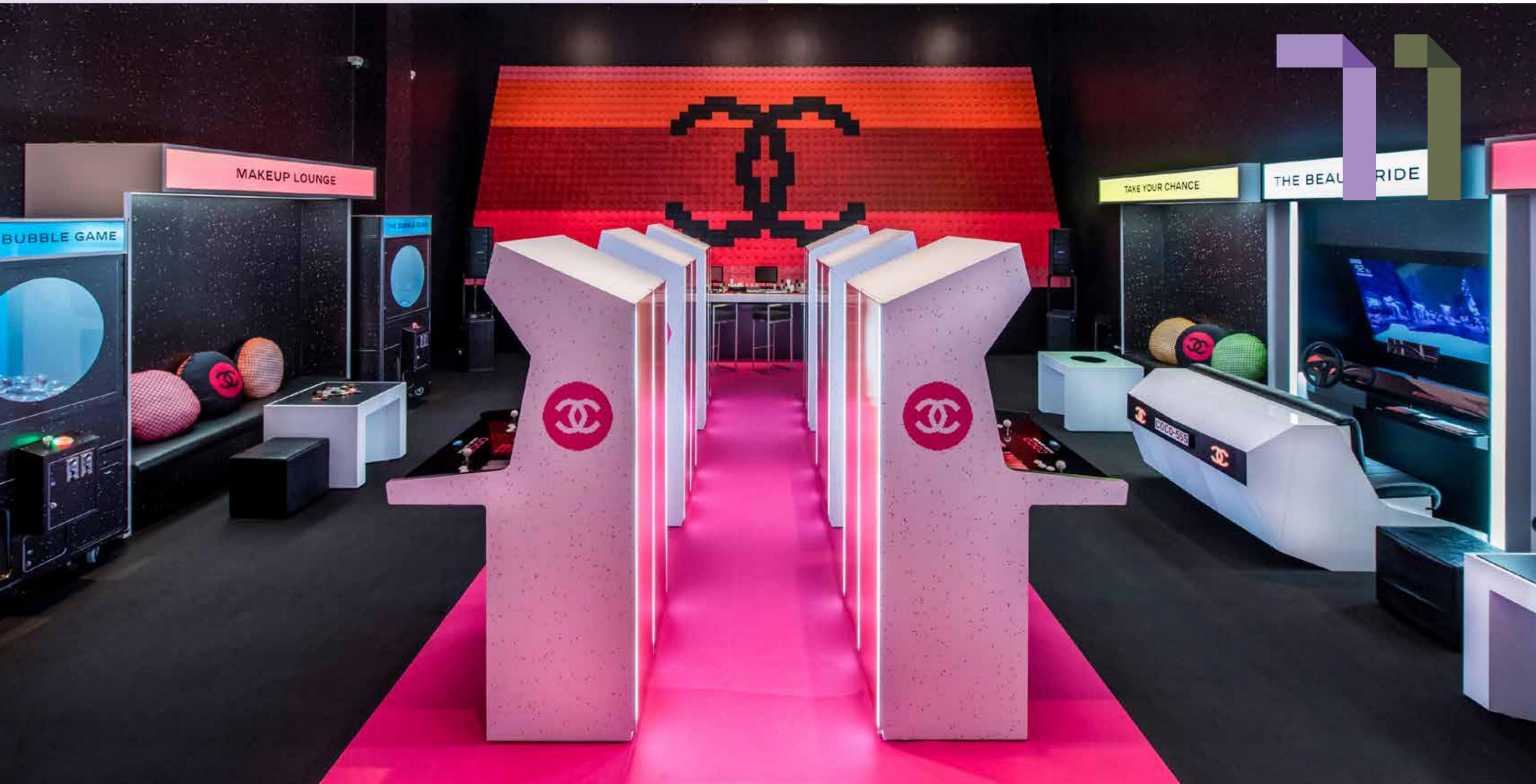
Earlier in July 2019, Gucci introduced the vintage-inspired Gucci Arcade gaming feature on its mobile app. It currently features four titles: *Gucci Lips*, *Gucci Grip*, *Gucci Ace* and *Gucci Bee*. The latter is a maze game reminiscent of Pac-Man, where players have to navigate a bee (a popular motif for the brand) through different levels while collecting tokens and unlocking special elements.



These launches follow in the footsteps of Chanel's Coco Game Center, a pop-up beauty arcade experience. The 1990s-themed video game arcade toured Asia in spring 2018 and incorporated the brand's products and identity. In 2017, Cartier launched a Pac-Man-style game on WeChat to promote its Amulette de Cartier range.

Why it's interesting:

Millennial shoppers are expected to account for 50% of spending in the personal luxury market by 2025, according to a 2019 report from Boston Consulting Group and Altagamma. Looking to stay relevant with younger consumers, luxury labels are embracing gaming culture and refining the image of the stereotypical gamer.





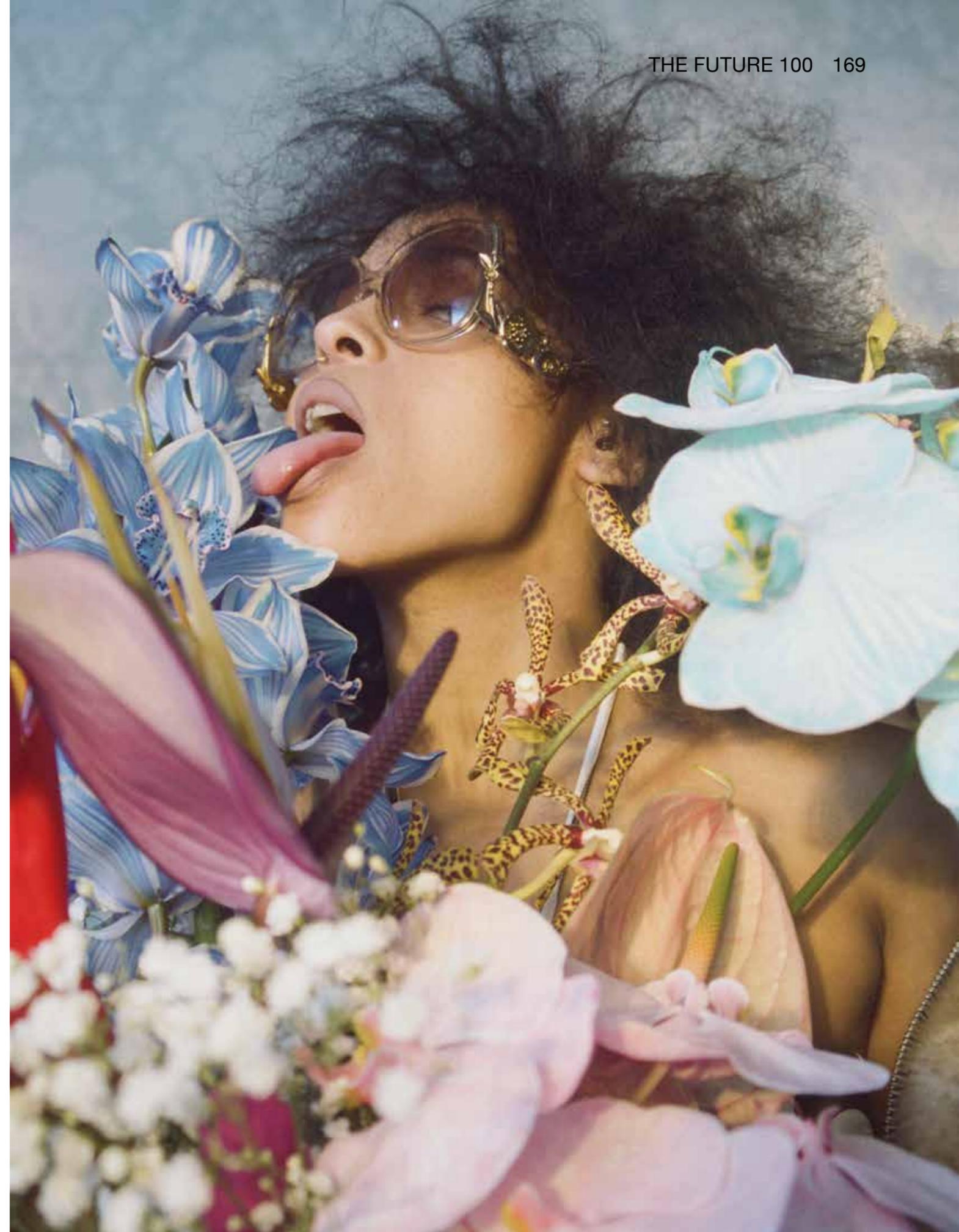
Haute horticulture

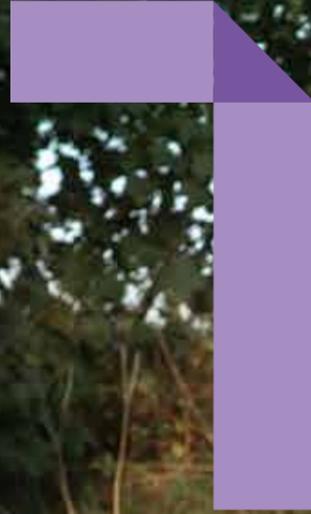
A groundswell of designers, celebrities and retailers are featuring florals in brand activations, elevating flowers to a mark of luxury.

As an evolution of the elaborate floral headpieces that dominated the SS19 runways, brands and retailers are turning to florals to reference high-fashion opulence.

In September 2019, high-end department store Selfridges tapped “imaginative and flamboyant” floral studio Rebel Rebel for the launch of Kate Hudson’s sustainable clothing collection HappyxNature. Elegantly overgrown pedestals and flower crowns were chosen to complement the fashion line. The floral design house was also responsible for the flowery backdrops and floral arrangements featured in haute-couture fashion house Giambattista Valli’s fall/winter 2020 campaign for H&M.

Retailers are also putting fresh blooms front and center. As part of Neiman Marcus’s March 2019 grand opening of its first New York City retail location, PopUp Florist opened a semi-permanent flower cart offering its beautiful







Floral creatives are reinvigorating floristry—and having a profound effect on visual culture and design.

Claire Coulson, contributing author, *Blooms*

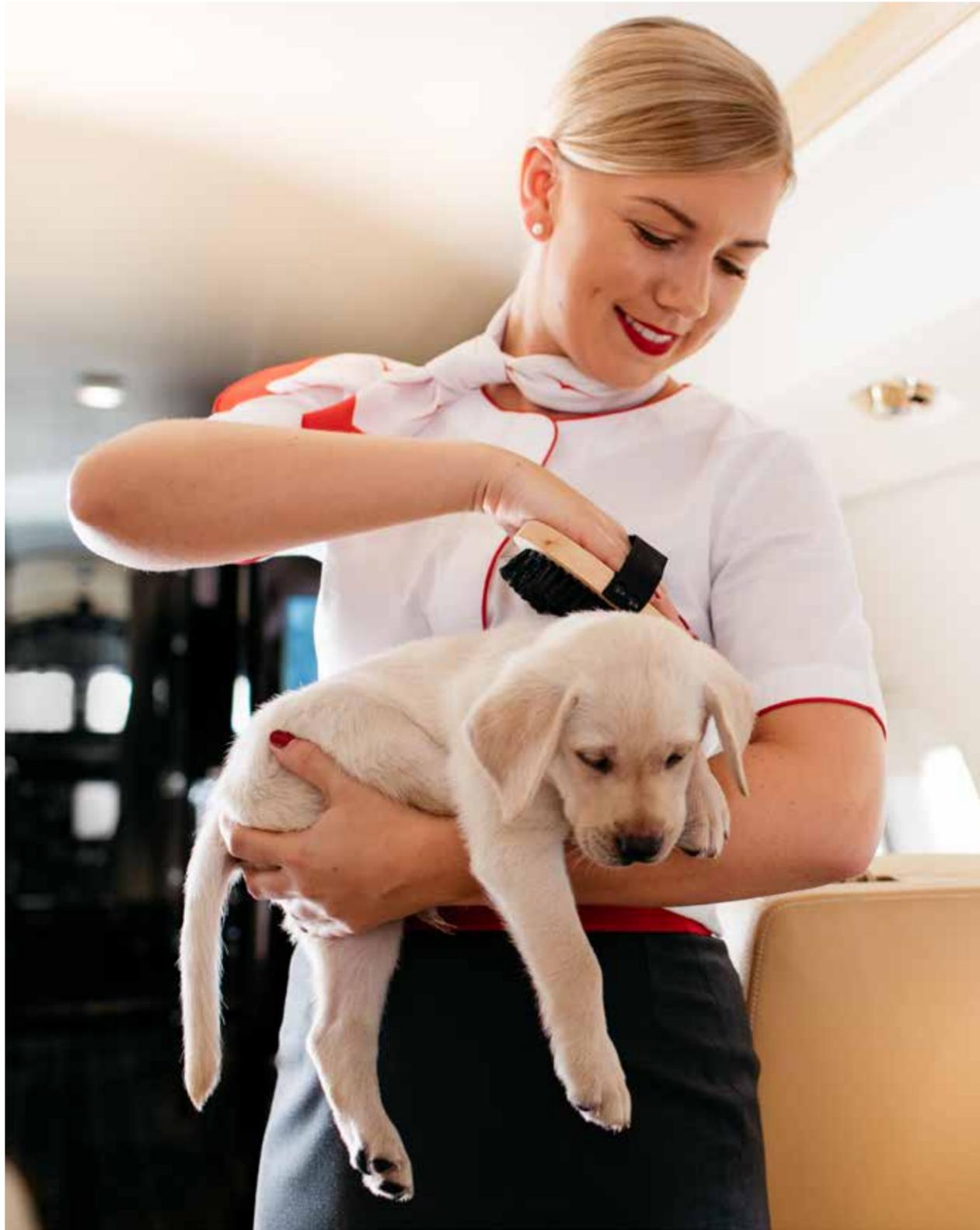
bouquets. And luxury consignment retailer The RealReal has a flower stand stocked by Fox Fodder Farm—rated top florist by *Vogue* and *Harper’s Bazaar*—at the entrance of its Manhattan flagship boutique.

The art of floristry has been further established in Phaidon’s 2019 book *Blooms: Contemporary Floral Design*, which celebrates this craft across disciplines, from haute couture to music videos. “Together, these floral creatives are reinvigorating the world of floristry,” Claire Coulson, *Blooms* contributing author,

tells Wunderman Thompson Intelligence, “pushing the boundaries of artistic expression with flowers and plants and having a profound effect on visual culture and design.”

Why it’s interesting:

Flowers have evolved from pretty to provocative thanks to a visionary class of creatives who are elevating avant-garde and unexpected floral designs into a luxury cue for brands.



Jet-setting pets

Pets are increasingly being treated as members of the family, including tagging along on luxury holidays, and some hotels and airlines are bending over backwards to make them feel welcome.

At VistaJet, a private jet charter company based in Malta, the number of animals on board has increased by 104% since 2017, with one in four VistaJet members flying regularly with a pet. The jet travel company's VistaPet pet flyer program, introduced in April 2019, offers four-legged travelers care kits, handmade sleep mats, rope toys and bio-organic menus.

Prior to their holiday, nervous pets can undergo a four-week pre-flight course to counter their fear of flying, helping to desensitize them to things like the smell of fuel, the roar of jet engines, cabin air pressure and turbulence. Once your pet is on board, flight attendants offer natural flower essences to mix in pets' drinking water to further help relaxation. The airline can also recommend pet-friendly hotels, salons, walkers and even photographers at your destination.

In November 2019, Canopy by Hilton, a boutique hotel-style chain in North America, introduced its partnership with Bark, makers of the BarkBox monthly customized subscription box of themed dog toys and treats. Canopy's emphasis is on a local experience and dogs are no exception. In addition



At the Smith & Whistle in London's Mayfair there's an entire dogs' drinks menu-Dogtails include the Bubbly Bow Wow and the Poochie Colada



to a snuggly toy and all-natural treats, it also offers a neighborhood guide of dog hot spots for Fido to visit.

At the Smith & Whistle in London's Mayfair there's an entire dogs' drinks menu, with Dogtails including the Bubbly Bow Wow (dog-friendly prosecco and liquidized blueberries) and the Poochie Colada (kale, broccoli and coconut water).

The trend for luxury holidays for pets is prevalent in Asia too. Hotel W Shanghai The Bund is among many in the Marriott group to join the Pets Are Welcome (PAW) program, with special treats, toys and dog walks.

Why it's interesting:

Luxury for pets is being bolstered by the singledom trend, particularly in China. Singles are lavishing their disposable income on dogs and cats instead of kids. Nearly 40% of Chinese pet owners are single and they're contributing to a pet economy that's more than tripled from 2013 to 2018, reaching almost \$25 billion, according to a 2019 report by Frost & Sullivan.





Health concierges

High-end destinations are catering to wellness-minded travelers with tailored health services.

In October 2019, Four Seasons launched a new wellness retreat in Hawaii. The all-inclusive destination was created specifically to provide “what today’s luxury traveler wants: an exclusive and differentiated wellness travel experience,” says Christian Clerc, president of global operations at Four Seasons Hotels and Resorts.

Guests are matched with a personal wellness guide who helps craft a bespoke health program incorporating nutrition, fitness and holistic spa treatments. The experience also includes one-on-one sessions with wellness practitioners and makes use of tech-enhanced services, such as thermal body mapping, for deeper health insights.

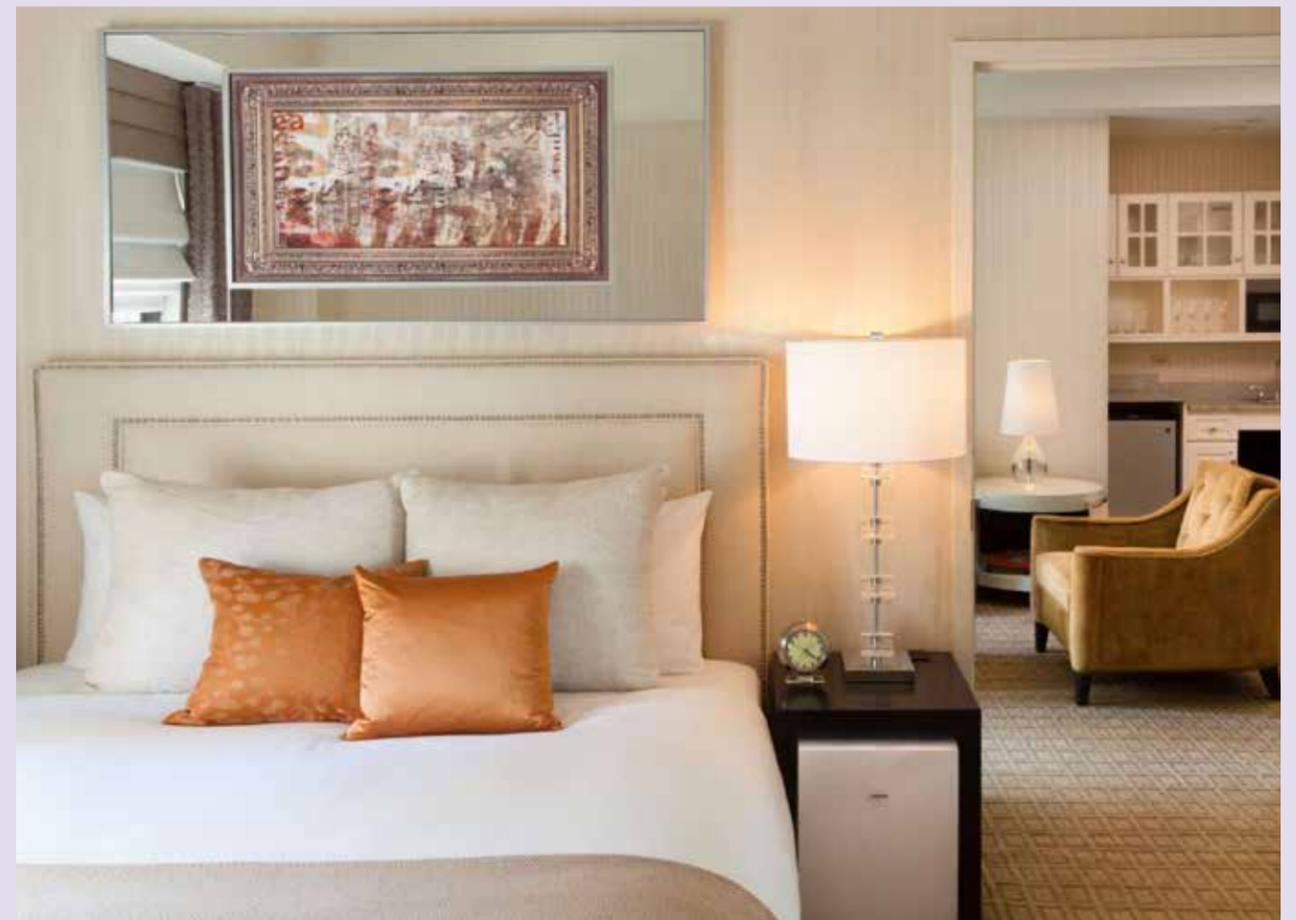
Combining tailored services with expert insight, health concierges are shaping up to be the next evolution of the global wellness tourism industry.

Equinox Hotel, which opened in New York City in July 2019, also features individual health concierge services. To ensure a good night's sleep, the hotel offers on-call sleep coaches to analyze guests' circadian rhythms, and it provides in-house services such as jet-lag tonics and cryotherapy chambers.

This follows the success of The Benjamin hotel's Rest & Renew program, developed by sleep expert Rebecca Robbins. "We've designed a series of products and services that improve the sleep experience," she tells Wunderman Thompson Intelligence. These range from a pillow menu segmented by sleeper type to a "power down" call (the opposite of a wake-up call) where "the staff will come up to your hotel room and share some good sleep strategies," she explains.

Why it's interesting:

Combining tailored services with expert insight, health concierges are shaping up to be the next evolution of the global wellness tourism industry, worth in excess of \$639 billion according to the Global Wellness Institute.





Wellness architecture

Architects are constructing a healthier living environment, further cementing the wellness movement.

“More and more architects, interior designers and engineers are working together with scientists for healthy design,” says Xue Ya, president of architecture firm Delos Asia and part of the team behind the Well Living Lab. She adds that they aim to make spaces “more like human beings’ natural life.”

Delos collaborated with the Mayo Clinic on the Well Living Lab, which investigates the health implications of indoor environments. The lab, which opened its second location, in Beijing, in 2019, is “dedicated to identifying how buildings—and everything that goes in them—impacts human health and wellbeing.”

As well as its work on the lab, Delos has devised multiple projects pioneering healthy home design. It has created what it identifies as the healthiest condo in New York City, incorporating amenities such as antimicrobial surfaces, showers dispensing filtered water infused with vitamin C, in-duct aromatherapy and individually calibrated circadian lighting systems.



At the 2019 CES tech show, Delos unveiled Darwin, a smart-home system that certifies a healthy indoor environment. It adds “a layer of wellness intelligence to the smart-home landscape,” says Delos CEO and founder Paul Scialla. The system integrates features such as indoor air and water purification and light and temperature optimization throughout the day to support natural sleep cycles.

The need to create healthy indoor retreats will become a necessity as people spend more time indoors. Research by the US Environmental Protection Agency has found that Americans spend approximately 90% of their time inside, meaning a lucrative market in interiors that prioritize wellbeing.

Why it's interesting:

Sustainable building practices—which show no signs of slowing down – focus on the health of the environment, and they prioritize the health of the occupant. “The spaces that we inhabit influence and partially shape who we are and how we are feeling,” designer Jenny Sabin tells Wunderman Thompson Intelligence. As nearly every aspect of modern life gets the wellness treatment, architects are drawing this attention to the built environment, turning wellness-infused living spaces into the latest luxury.



Sensory travel

In an era of mass distraction, luxury travel is using all five senses to imprint experiences.

Hotels and airlines are diffusing signature scents; spas are offering chime and gong baths; and nature is being welcomed in rather than shut out.

For some brands, it's simply a question of pointing out and making time for what's already on their doorstep. Luxury travel company Belmond offers First Light nature walks in partnership with Leica Sport Optics at its hotels in Botswana, Mallorca, Cape Town and Iguazú Falls, on the Argentina/Brazil border. Guests head out at dawn with Leica binoculars to spot flora and fauna in the surrounding area. The soft light and quiet help deepen guests' appreciation for local natural beauty, and the brand draws on nature to differentiate it in a memorable way.

At downtown Kuala Lumpur's EQ, the new flagship of the Hotel Equatorial chain, ambient music is played through underwater speakers in the 29th-floor infinity pool and its Japanese restaurant Kampachi boasts a sushi counter made of fragrant hinoki wood, a type of cypress used to make incense.

EQ also employs scent in the lobby, ballroom and lounges to evoke a sense of luxury. Scent consultant AllSense worked with EQ to pick a scent called Black

Your senses are connected so strongly to experience. We are at a point where clients are looking for bespoke stuff.

Errol Capel, creative director, SynerG



Orchid, with floral and lemony top notes and a woody base that includes sandalwood and musk.

Another client of AllSense, and of sound specialist SynerG, Singapore's Changi Airport plays music carefully selected to help with traffic flow. At all four terminals at Changi, voted the world's best airport by Skytrax for seven years in a row, music has a faster tempo at peak hours and is slower at off-peak times—a subtle way of influencing the speed at which travelers walk. “Your senses are connected so strongly to experience,” Errol Capel, creative director at SynerG, tells Wunderman Thompson Intelligence. “We are at a point where clients are looking for bespoke stuff.”



Why it's interesting:

There's increasing awareness of the importance of being present in the moment. Luxury travel has long focused on sight, taste and touch to create evocative experiences and memories, and is increasingly expanding its tool kit to also include smell and sound.



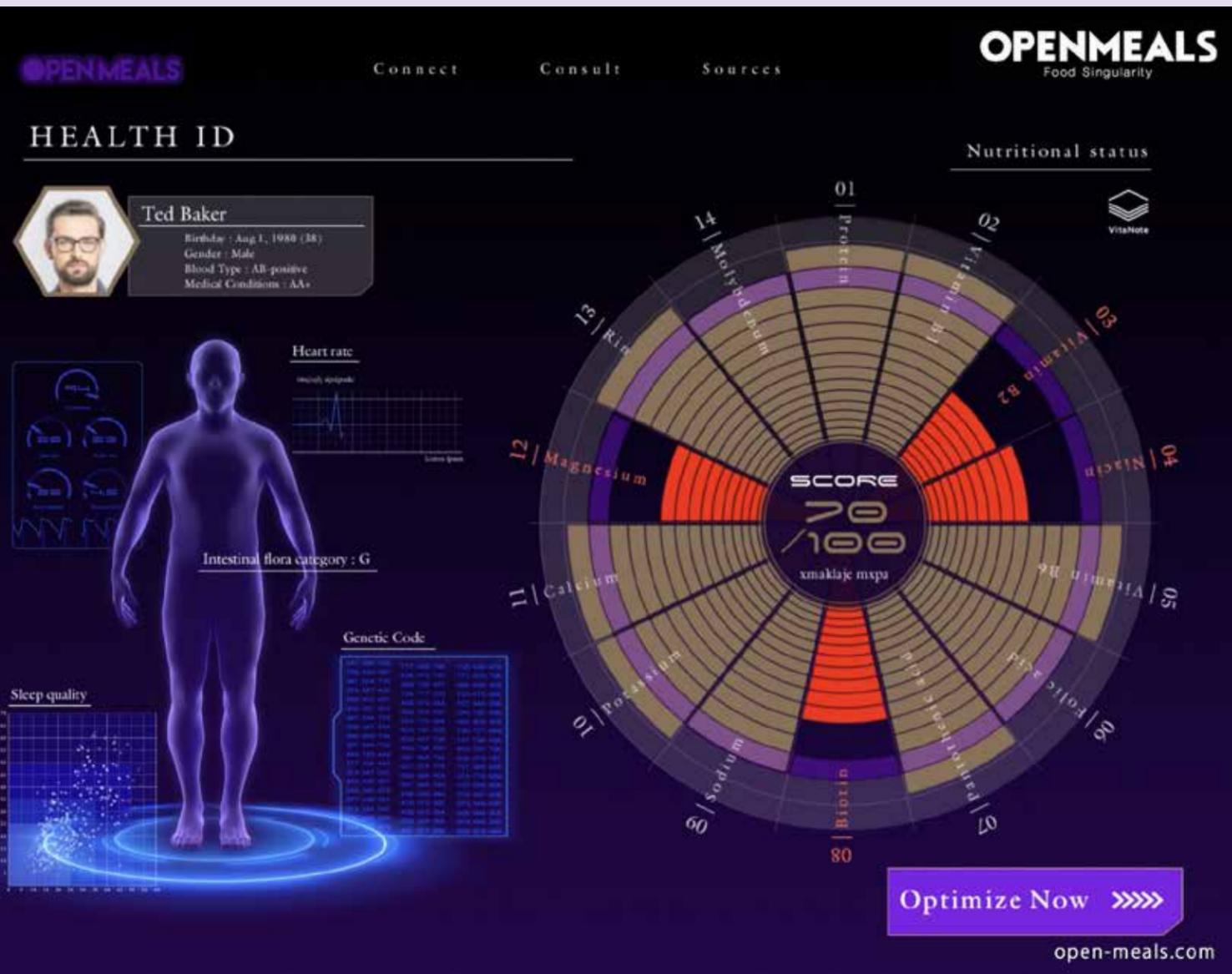
Biodata services

Advances in speedy, sophisticated DNA analysis are paving the way for lifestyle experiences that elevate the hyper-personalized offerings already saturating the luxury space.

Set to open in Tokyo in 2020, restaurant Sushi Singularity will collect bio samples from guests to create bespoke, 3D-printed sushi tailored to diners' nutritional needs. Daniel del Olmo, founding partner of the Passionality Group, has called it the next era of dining. "We believe hyper-personalization will become commonplace in the future," he said at the Restaurant Finance & Development Conference in Las Vegas in November 2019.

Another sushi dining experience assesses a person's DNA information to curate a menu suited to their specific nutritional needs. London's Yo! Sushi partnered with at-home genetic testing company DNAFit in February 2019 for the Yo! Dinner, Yo! Way scheme, and offered free personalized meals to a select number of customers who mailed in a saliva sample.

DNA matchmaking is also turning the search for love into a science. Tokyo-based Gene Partner Japan uses DNA samples to analyze a person's human leucocyte antigen (HLA) genes. The theory is that the bigger the difference between two people's HLA makeup, the more likely they'll find each other



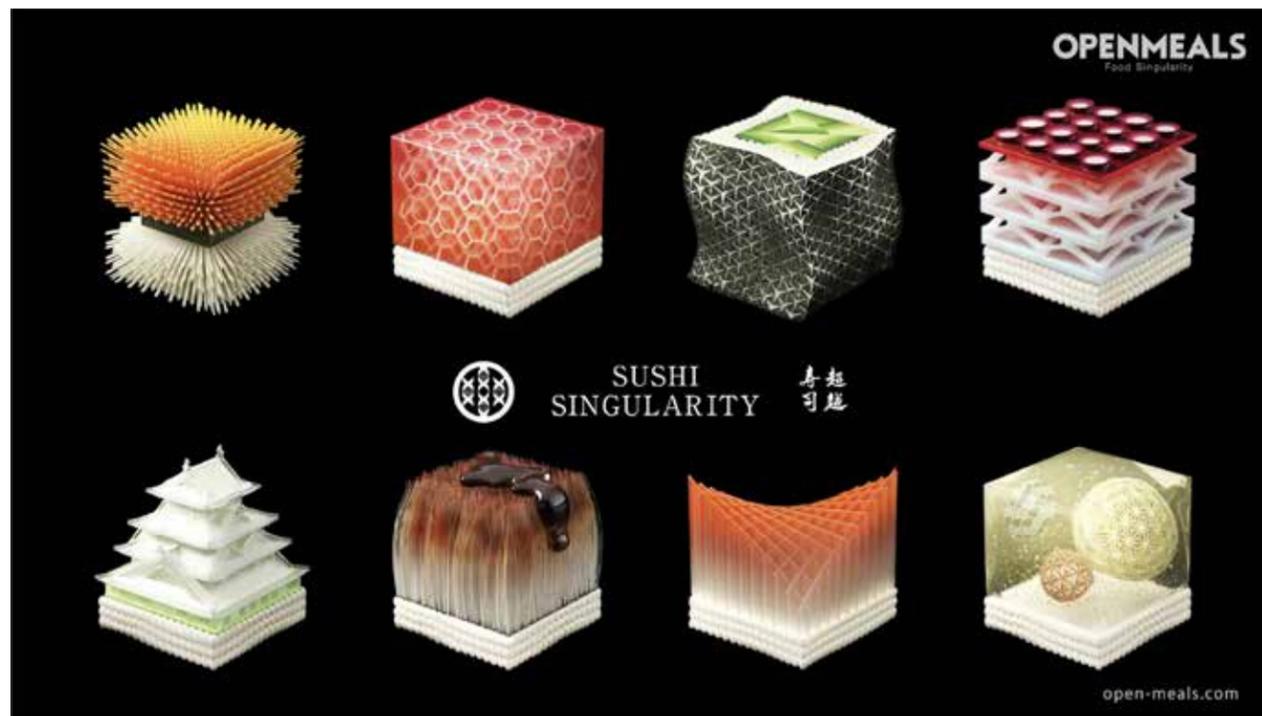
attractive. Competing Tokyo firm Gene Future offers a similar service to future couples at a more affordable price. In Singapore, GeneMate, which launched in June 2019, offers customers the chance to find their life partner using biodata and the firm's own unique algorithm. Companies in both Japan and Singapore have received government support for DNA matchmaking services as they battle dropping birthrates.

In travel, biotechnology is taking already unique Airbnb experiences to a transformative level. Airbnb partnered with 23andMe in spring 2019 in a bid to help customers tailor their activities around their ancestral heritage, revealed

through taking one of 23andMe's DNA testing kits. "Someone with Mexican roots could find an experience in Mexico City to learn ancient techniques of natural dye as part of their heritage vacation," Airbnb suggests.

Why it's interesting:

Despite continued debate over whether genetic testing can accurately and conclusively predict factors like compatibility or even heritage, consumer DNA services aren't going anywhere anytime soon. As testing kits become more streamlined and advanced, applications will likely continue to expand into new territories that add value beyond basic wellness reports and assessments.





We believe hyper-personalization will become commonplace in the future.

Daniel del Olmo, founding partner, Passionality Group





Cannabis consultants

As cannabis culture becomes increasingly refined, experts are offering connoisseurship services to discerning customers.

Cannabidiol, one of the active but non-psychoactive ingredients in cannabis, is now universally known as CBD and is increasingly widely available, in increasingly sophisticated formats.

In May 2019, CBD retailer Standard Dose expanded from an online shop to a bricks-and-mortar wellness haven in New York City. In-store “educators” are on hand to walk visitors through the products and find ones that “suit their individual needs, since CBD affects everyone very differently,” Standard Dose founder Anthony Saniger told *Coveteur*. The guidance complements a range of curated experiences, from meditation workshops to a tea bar with hemp-infused drinks.

On an even more exclusive level, California-based cannabis consultant Amy Robertson provides ultra-personalized experiences and advice to help her clients sift through the hype and find the high-quality, artisanal cannabis that can fulfil their unique needs. “The high-end market—they can have anything,” Robertson told *Vice*. If clients aren’t looking to solve a medical issue, “it’s about what kind of mind-shifting experience can they have,” said Robertson. A growing number of luxury consumers are looking for education and guidance



for navigating the cannabis market and business ethos, as claims and products become subject to more intense scrutiny. According to Arcview Market Research, the market could exceed \$23 billion by 2022.

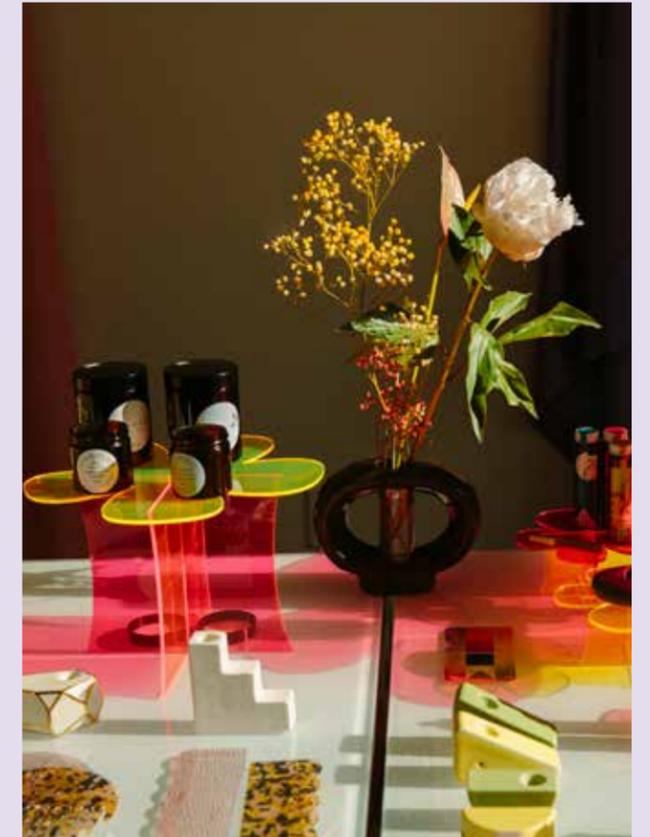
“It is in part due to consumers becoming more conscious in general,” Emma Chasen, cofounder of cannabis education firm Eminent Consulting, tells Wunderman Thompson Intelligence. “If you care about the food you put in your body and take time to source organic, local produce then you should absolutely care about the cannabis you are consuming.”

New festivals and immersive events are bringing together brands, experts, first-timers, and seasoned enthusiasts for education, entertainment and networking. *Broccoli* magazine’s In Bloom festival kicked off in May 2019 in Portland, Oregon, with cannabis-themed art and musical performances, workshops, panel discussions and tastings. A few months later in Los Angeles, the Weedmaps Museum of Weed took guests on a cultural and political journey, shedding light on common misconceptions of cannabis.

“I think the next step in education will be targeting healthcare professionals and physicians,” says Chasen. “To best help their patients, they need the education more than any other demographic. Therefore, I predict we will start to see more degree programs and accreditations coming from universities and community colleges in the near future.”

Why it’s interesting:

The CBD market swarms with countless brands aimed at the cannabis curious. Those that take the extra step to enlighten customers on the many facets of cannabis consumption, from strains to dosage to formulation, will stand out. High-end consumers in this space are seeking an experience crafted exclusively to them.





The new-age explorer

In an era of political and economic unease, people are turning to travel as a respite and as a tool for happiness.

A survey conducted by the Travelzoo members' travel site found that 70% of respondents polled across Australia, Canada, China, France, Germany, Hong Kong, Spain, the United Kingdom and the United States planned on incorporating wellness activities into their travel plans for 2019—and 83% of respondents said that taking a holiday has a positive effect on their mental health.

In response, Travelzoo launched its spring 2019 “May for Me” campaign. The campaign’s online hub offered dedicated travel packages specifically focused on wellness, along with wellness travel tips. Travelzoo defined wellness holidays as breaks tailored to improving mental or physical health, and the May for Me site included packages for yoga in Nepal, health farms in Portugal, and spa days across the United Kingdom and United States, all aiming to meet the growing demand for wellness travel.





The world can feel like a dark and dreary place; our feeds filled with bad news, uncertainty and stress. Every Cloud goes in search of silver linings.

Black Tomato

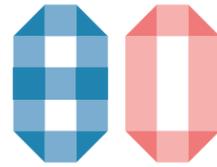
In October 2019, luxury travel site Black Tomato kicked off the Every Cloud contest. Acknowledging that “the world can feel like a dark and dreary place; our feeds filled with bad news, uncertainty and stress,” Every Cloud goes “in search of silver linings.” The winner will travel the world over the course of 2020 in search of joyful experiences, while creating content alongside Black Tomato, leaning into the widespread belief that travel experiences are universally uplifting.

According to the Black Tomato site, the traveler will document “encounters with some of the world’s most unique—and unquestionably positive—people, places and experiences” and the year-long campaign will be shared with the Black Tomato audience, turning one person’s individual journey into inspiration for many.

Why it’s interesting:

As consumers try to embrace a more optimistic mindset, travel is evolving from an escape into a meditation on positivity and happiness, and a channel for wellbeing.





Vegan hotels

High-end travelers get the vegan treatment thanks to luxury hotels providing an ethical and sustainable experience.

In a Victorian village in the Scottish Highlands is a hotel that showcases “ethical luxury.” Saorsa 1875 opened in June 2019 and every aspect of a stay here is steeped in its thoroughly thought-through vegan philosophy. From staff uniforms to cleaning products to minibar snacks to electricity—which is provided by vegan-certified green energy company Ecotricity—every detail, from check in to check out, is vegan, ethically sourced and free of animal byproducts.

“We want to show people that veganism isn’t just a compassionate, ethical choice; it’s also an exciting, vibrant way of life,” says Saorsa 1875 cofounder and head of lifestyle Jack McLaren-Stewart.

Saorsa 1875 is a timely opening, as more Britons adopt a vegan lifestyle. According to the Vegan Society, the number of vegans in the United Kingdom quadrupled between 2014 and 2019. Mintel research released in 2019 found that 34% of British meat eaters had taken a flexitarian approach and actively reduced their meat consumption in the six months to July 2018.





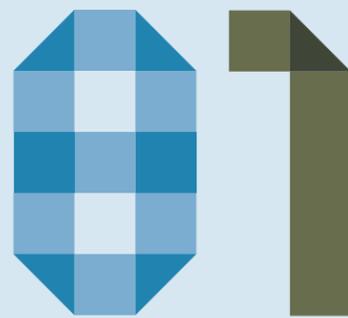
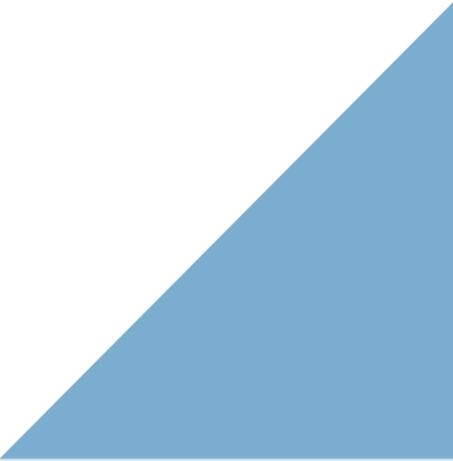
Reflecting this growing market, Hilton unveiled “the world’s first vegan suite” in January 2019 at its London Bankside location, created in collaboration with design duo Bompas & Parr and the Vegan Society. The suite’s soft furnishings are exclusively made from plant-based fabrics, including organic cotton carpets, soybean-silk curtains and buckwheat-stuffed pillows. Fittings, right down to the key cards issued at the dedicated check-in desk, draw on Piñatex, a material made from pineapple leaves that resembles leather.

“While the suite is primarily designed for the sustainable traveler, we hope that everyone can enjoy it—not just those who enjoy a vegan lifestyle,” general manager James B Clarke told CNN, also revealing that the suite has attracted high-profile attention, with “inquiries from celebrity athletes, among others.”

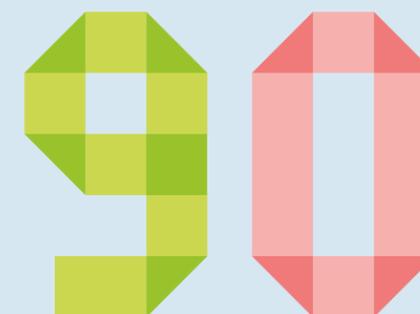
Why it’s interesting:

Veganism, which once called to mind an ascetic, puritan lifestyle, is being elevated to a covetable luxury amenity driven by ethical consumers. While the food industry is responding en masse to this market, luxury brands are going one step further by transforming destinations into sanctuaries free of animal-derived products.





Health





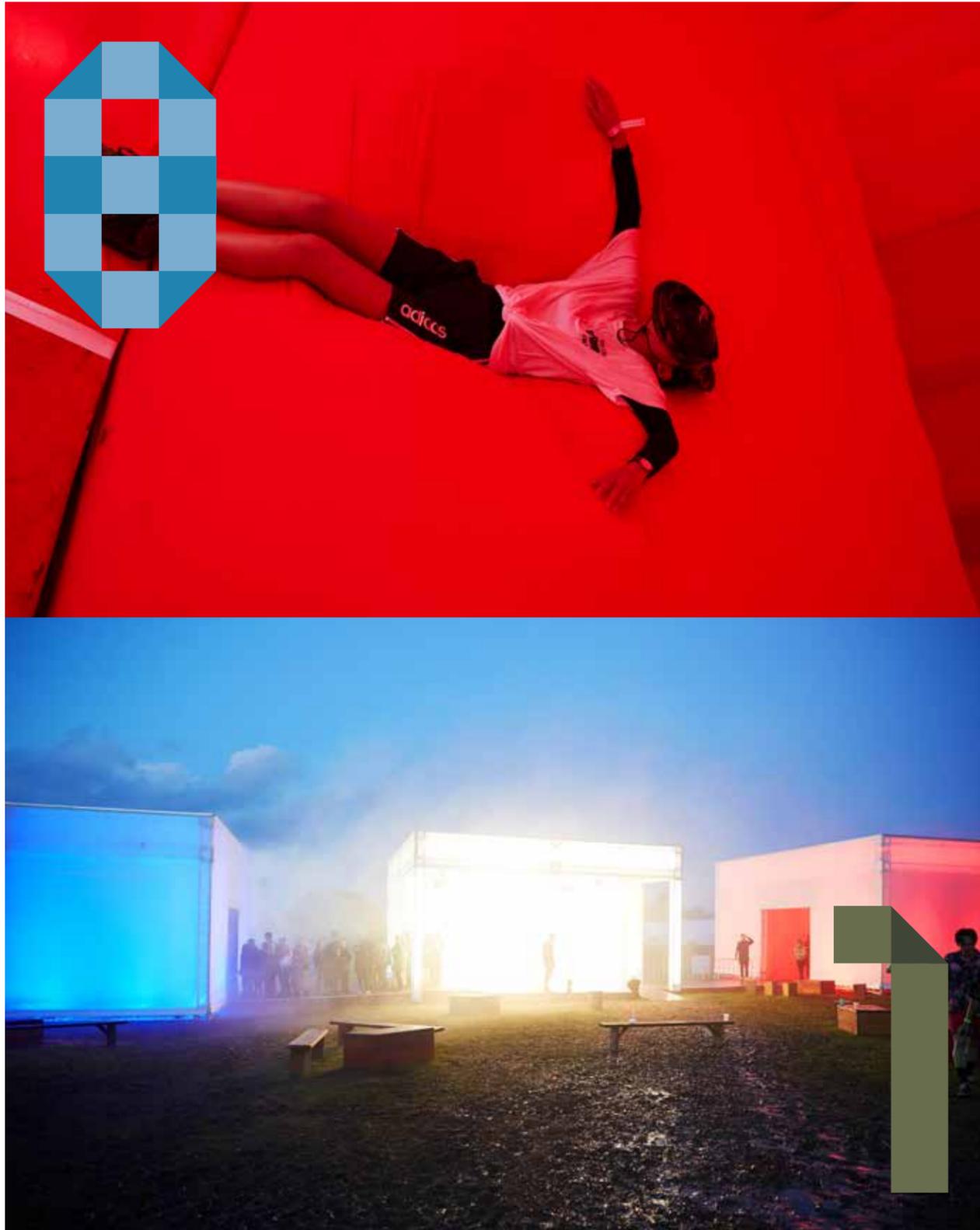
Healing festivals

Music has the power to transport us and it seems a natural step for musicians to embrace the wellness wave.

Icelandic band Sigur Rós, renowned for creating ambient, otherworldly music, held a series of sound baths to enable fans to experience the playlist *Liminal* “in a live arena with other human beings.” The band describes each sound bath as a blend of “soaring live vocals and mesmeric, sound-reactive lights to bliss you out. Everyone surrenders to the stillness and, if it’s been done right, gets to go away feeling like they might just have seen everything from a slightly different angle.” The events took place between 2017 and 2019 at venues ranging from the Natural History Museum of Los Angeles County to the Days Off festival in Paris and London’s British Summer Time Hyde Park festival.

Glastonbury Festival launched the Humblewell area in 2019, which the organizer describes as encompassing “the physical, emotional, and social dimensions of





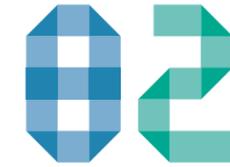
wellness.” The program of events included Breathbeats, a fusion of “breathwork and psycho-acoustic sound,” created by DJ Tom Middleton and Richie Bostock—otherwise known as the Breath Guy.

Charting the rise of the wellness trend at festivals, the *Guardian* pointed to Love Trails Festival, which fuses running with music. The festival says that from its main stage, “an eclectic mix of iconic and new artists soundtrack three jam-packed days featuring trail running adventures of various distances.” Theo Larn-Jones, cofounder and director of Love Trails, told the *Guardian* that “the crux of the festival is tapping into the desire from especially younger people—so those in their 20s and 30s—to live fuller and healthier lives and feel good. I am part of that group: we still want to go to festivals and want to party but don’t necessarily want to get off our faces and get drunk in the process. It’s like the runner’s high; that endorphin hit from a run is replacing other kinds of highs you might get at festivals.”

There were a host of wellness activities at Childish Gambino’s Pharos event in New Zealand in 2018, including “sound baths, cosmic humming, truth connection booths, and enlightenment exercises,” *Dezeen* reported. “Pharos is meant to be a communal space—a place that evolves and reacts to the culture,” the rapper, whose real name is Donald Glover, told *Dezeen*. “We are selling real intimacy. We protect the experience and it becomes something you genuinely share with the people around you and you take away something special.”

Why it’s interesting:

For millennials and generation Zers, a music festival experience isn’t necessarily synonymous with unbridled hedonism. Instead, they’re looking to expand their minds in ways that enhance their wellbeing, with forward-thinking musicians and festival organizers tapping into this nascent movement.



Psychedelic health

As cannabis moves smoothly into the mainstream, psychedelic drugs are coming to the fore as the next generation of therapeutics.

Research within the scientific community points to the potential for psilocybin—the psychoactive compound in magic mushrooms—to treat depression by taking users deeper into their consciousness.

In September 2019, Florida-based John Hopkins Medicine launched the Center for Psychedelic and Consciousness Research after receiving \$17 million from private donors. The lab says it will use psychedelics “to study the mind and identify therapies for diseases such as addiction, PTSD and Alzheimer’s.” Its program includes research into psilocybin mushrooms.

Imperial College London opened the Centre for Psychedelic Research in April 2019 to study the action of psychedelic drugs, with a particular focus on researching the treatment of depression. Dr Robin Carhart-Harris, the head of the center, says that the opening “represents a watershed moment for psychedelic science; symbolic of its now mainstream recognition. Psychedelics are set to have a major impact on neuroscience and psychiatry in the coming years.”

As more research points to the benefits of psychedelics, US lawmakers are paving the way for its integration into the mainstream. Denver, Colorado and Oakland have decriminalized the possession of psilocybin products, with Santa Cruz potentially following in the same footsteps.

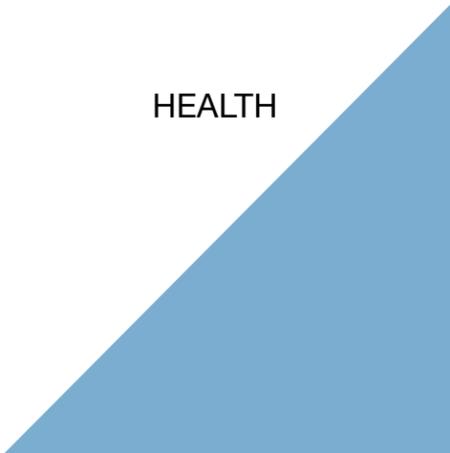
Further legitimizing the halogenic substance, the Food and Drug Administration (FDA) granted Breakthrough Therapy designation to Compass Pathways in October 2018 and, more recently, to Usona Institute in November 2019. Both companies are conducting clinical trials into psilocybin's potential to treat severe depression. According to the Anxiety and Depression Association of America (ADAA), 16.1 million Americans suffer from major depressive disorder (MDD)—if the research proves correct, psilocybin could become a treatment option.

Health benefits aside, consumers are also tapping into psychedelics to explore their mind and consciousness in a deeper way, and psychedelic retreats are growing as a result. Britain's Psychedelic Society offers psilocybin retreats in Europe, and says they are “aimed at people in good mental and physical health wanting to explore the nature of reality and the mind.”

Synthesis is a retreat center in the Netherlands that pioneers “transformative wellness.” Launched in April 2018, it offers core three-day events at £1,640 (\$2,148), aimed at “curious individuals who want to utilize moderate-to-high doses of psilocybin truffles to catalyze creative breakthrough, explore consciousness, find meaning, improve confidence and search for mystical experience.”

Achieving a psychedelic experience without drugs is becoming a viable option thanks to startup Wavepaths. Led by a team of scientists, technologists,





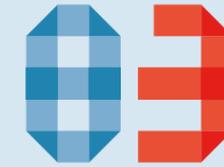
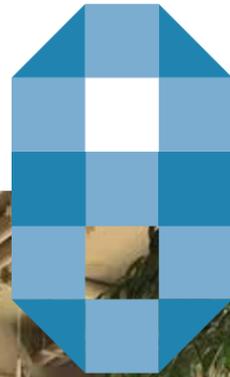
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psychotherapists and artists, its mission is to make “transformative experiences widely accessible.” Combining music, light and input from psychotherapists, Wavepaths’ immersive experience will guide participants either towards “stillness and calm,” or on a “journey inwards, connecting to deeper emotional states,” the company says.

Why it’s interesting:

Psilocybin could be the new cannabis. Growing research into psychedelics points to its therapeutic benefits for mental health and, with the legal process slowly trudging along, consumers are turning to retreats to tap into psychedelics and open up a new wellbeing experience.



Fast healing spaces

Self-care as a concept might be front and center in consumers' minds, but how many city dwellers can take time out for a spa day or lengthy treatment?

Enter a crop of fast healing spaces, offering doses of peace and calm squeezed into convenient time slots for stressed urbanites.

3Den describes itself as an “urban lounge,” located in New York’s new Hudson Yards development. Alongside places to work, it also offers “quiet zones, nap pods, and generously stocked showers” that provide its clientele with the opportunity to recharge while they’re in the city. “We’re an aggregate of the best parts of the coffee shop, the hotel lobby, elements of a gym and various other resources,” 3Den founder and CEO Ben Silver tells Wunderman Thompson Intelligence. “We’re not reinventing the wheel when it comes to consumer behavior; these are things that people are already doing, but they’re doing them in a very disparate and dysfunctional manner. We’re aggregating them into a much better consumer experience.” Entry to 3Den is affordable, starting at \$6 for 30 minutes.

Thinx, known for its period-proof underwear, created a wellness experience around its products with the opening of the Rest Room, a pop-up space on Elizabeth Street in New York’s SoHo that ran from October 28, 2019 to January



1, 2020. Customers could purchase Thinx products, relax in the drop-in lounge area and enjoy a program of events that spanned OB/GYN fertility consultations and educational sessions on how Thinx products work.

The concept is taking hold in London too. With branches in the city's Holborn and Shoreditch neighborhoods, Pop & Rest offers nap and meditation pods from £8 (around \$10) for 30 minutes. Inhere currently rents outs and sells its chic wooden meditation pods to businesses, with a permanent location set to open in spring 2020.

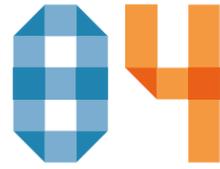
These western takes on fast, functional healing follow in the footsteps of established healing cafés in South Korea. Chains include Shim Story, a “public

The pace of life might be faster than ever, but consumers are increasingly conscious of the mental and physical toll a non-stop lifestyle can take.

convenience lounge” that offers heated beds, massage chairs and video games, and Mr Healing, which provides massage chairs and eye masks in an atmosphere scented with essential oils. Writing in the *Atlantic*, Uri Friedman called the cafés “a balm for a sleep-deprived population that works some of the longest hours in the developed world.”

Why it's interesting:

The pace of life might be faster than ever, but consumers are increasingly conscious of the mental and physical toll a non-stop lifestyle can take. These “walk-thru” healing spaces are tailoring mindful wellness to suit the breakneck speed of the modern world, allowing patrons a moment of contemplation and respite in their hectic days.



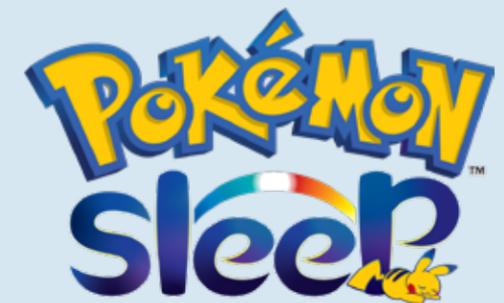
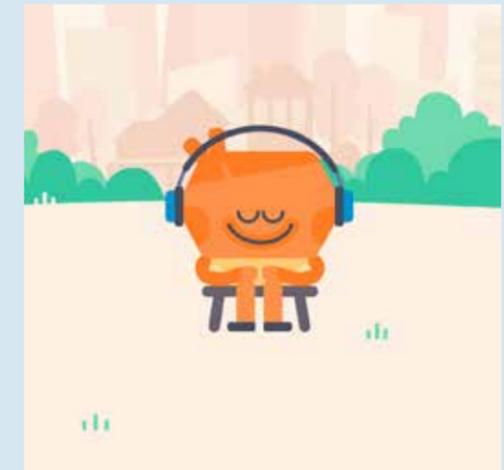
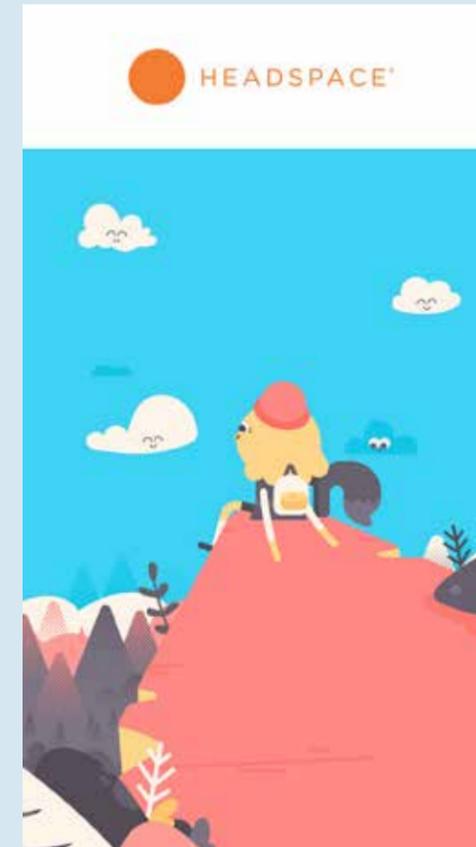
Digital spas

Social media and technology are frequently blamed for mental illness and poor health habits. Forward-thinking digital apps and platforms are now leveraging technology to encourage mindfulness and foster wellbeing.

In May 2019, *Dazed* launched the Dazed Beauty Digital Spa, which it describes as “an immersive space designed to make you feel healthier and happier away from the stresses of everyday life.” Reimagining the traditional spa, the initiative falls somewhere between an online community and a digitally guided wellness practice. The week-long program includes live-streamed yoga and breathwork classes, and a range of think pieces, quizzes and meditative podcasts that cover everything from color therapy to positive affirmations.

Other digital platforms are also being designed to help users find respite, relaxation and mental balance. Meditation app Headspace is working on the world’s first prescription-grade meditation app, specifically designed to treat a range of stress-related chronic diseases.

Even the Pokémon Company is turning its attention to wellbeing with the Pokémon Sleep gamified app. Announced in May 2019 and launching for

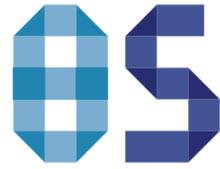


mobile devices in 2020, Pokémon Sleep aims to “reward good sleep habits as part of a healthy lifestyle.”

“The future is about integrating digital health tools like therapy apps with standard healthcare treatment,” Daniel Månsson, cofounder of Flow, tells Wunderman Thompson Intelligence. Launched at the beginning of June 2019, the Swedish startup is creating a medication-free digital treatment for depression.

Why it’s interesting:

Tech and smartphones have been blamed for a host of health problems, from poor mental health to sleep disruption. These new apps and platforms, however, are working to change that, paving the way for optimal wellbeing.



Genderless periods

As society moves towards a more inclusive future, gender norms are being re-evaluated and period brands, once exclusively marketed to girls and women, are rethinking their audience.

In fall 2019, Always made the decision to stop using the Venus symbol on its packaging, in a bid to be more inclusive of trans and non-binary consumers. “For over 35 years Always has championed girls and women, and we will continue to do so,” says Procter & Gamble. “We’re also committed to diversity and inclusion, and are on a continual journey to understand the needs of all of our consumers.”

New York-based company Thinx is taking a much more definitive stance. It first featured a transgender model in a campaign in 2016, and released a commercial called “MENstruation” in October 2019 that portrays a world where both men and women have periods. It ends with the tag line, “If we all had them, maybe we’d be more comfortable with them.”



The terms “feminine care” and “feminine hygiene” will be made redundant as society moves towards an inclusive future.

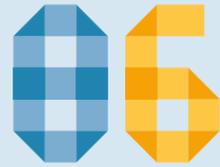


Changes in language and marketing to be more gender inclusive have been adopted by brands over the past few years. Lunapads released a period boxer brief in 2016 which has been “designed to meet the needs of transmasculine customers,” while in 2017 Pyramid Seven created “underwear for periods, not gender,” and Aunt Flow is actively changing language to be more gender inclusive.

Why it’s interesting:

The terms “feminine care” and “feminine hygiene” will be made redundant as society moves towards an inclusive future. Brands in this space need to rethink language and products—replacing “feminine products” with “menstrual products,” for example, or positioning themselves in the wellness sector, rather than women’s health, will allow everyone who has periods to identify.





PH-balanced everything

Could pH levels be the next port of call in gaining a deeper understanding of skin and health concerns?

L'Oréal's My Skin Track pH launched as a prototype in June 2019, under the personal care giant's La Roche-Posay brand. This microfluidic sensor captures trace amounts of sweat from pores through a network of micro-channels, "providing an accurate pH reading within 15 minutes," L'Oréal said at the time of the product's reveal at the 2019 CES tech show.

When pH balance is compromised, L'Oréal explains, it can trigger inflammatory responses, which could exacerbate conditions such as skin dryness, eczema and atopic dermatitis. The skin's acidity balance can be affected by environmental factors or individual underlying conditions, for example.

"PH is a leading indicator of skin health," says Professor Thomas Luger, head of the department of dermatology, University of Münster, Germany, in L'Oréal's statement. "It is something my patients ask about, but until now it has been very challenging to measure skin pH outside of a clinical setting. This tool has the potential to inspire consumers to adopt healthier skincare habits and empower medical professionals with an entirely new way to recommend skincare regimens."





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My Skin Track pH is being tested through La Roche-Posay dermatologists in the United States, with the aim of eventually launching a direct-to-consumer product.

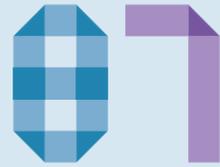
Vaginal health is also affected by pH balance, and a number of underwear brands have launched claiming to balance pH levels in that area. Among them is Huha, infused with zinc “to prevent infection and odor-causing bacteria.” Pure 5.5 says its breathable underwear helps to prevent infections and odor by keeping the vagina’s pH balanced. However, obstetrician and gynecologist Dr Sherry A Ross told *Well & Good* that she doesn’t believe pH-balanced underwear is “any safer than other vagina-friendly fabrics like cotton.”

Alkaline water is on the rise, too. Citing data from Spins, a data firm with a focus on wellness, *Bloomberg* reported that the alkaline water category, which is still a fraction of the massive bottled water industry, grew 36% to nearly \$270 million

in the United States in the year to April 2019. Claims for alkaline water include that it offers “better hydration,” with market-leader Essentia saying it offers “supercharged hydration so you can do that thing,” while Flow, promoted by Gwyneth Paltrow’s *Goop*, offers what it calls “naturally alkaline water” in cartons, rather than plastic bottles, to underline its sustainable ethos.

Why it’s interesting:

While pH levels are linked to skin health, the jury’s out on the efficacy of alkaline waters—in August 2019, *Forbes.com* ran an article titled “Seven reasons why alkaline water is basically a waste of money.” But the rise in this market illustrates the ongoing interest among consumers in the next big wellness-enhancing thing that they can fit seamlessly into their hectic lives. As Kara Nielsen, vice-president of trend insights at CCD Helmsman, told *Bloomberg*: “We’re demanding more from everything—it has to have a purpose. This is how the younger generation thinks about nutrients.”



Engineering companionship

Loneliness is not just a social issue, it's a public health problem too.

As the population's overall lifespan continues to extend, more of today's elderly population is facing aging alone and a number of new services and innovative tech brands are addressing this problem.

Research published in the *Wall Street Journal* suggests that eight million Americans over 50 years old have no spouse, partner or living child, according to sources including the US Census, and data from the Amsterdam Study of the Elderly published in the *Journal of Neurology, Neurosurgery and Psychiatry* shows that those who are lonely are more susceptible to depression, heart disease and dementia.

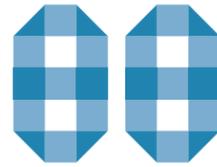
Japanese robotics startup Groove X unveiled Lovot at the CES 2019 tech show. An appealing robot, Lovot offers companionship and affection. Its many sensors allow it to interact with its user, responding to cuddles, squeezes and strokes. Lovot was designed by Kaname Hayashi, creator of pioneer robot Pepper. As he explained to *CNET*, the point is not to replace human relationships, but to preserve the capacity to engage emotionally. "If you love something every day, then you have the power of love," Hayashi said.



Also featured at CES 2019, ElliQ is a voice-activated companion robot that, after several years in development, is now available for pre-order. The multifunctional device helps older people stay connected to family and serves as an in-home companion, responding to voice, touch and even gaze. It can also act as entertainer, as well as supply helpful, proactive reminders to drink water and take exercise or medication.

Why it's interesting:

Projections by the US Census Bureau show that by 2030 there will be more Americans aged 65 and older than aged 18 and younger, for the first time in US history. With older generations set to outnumber their younger counterparts, this growing consumer group is not to be ignored.



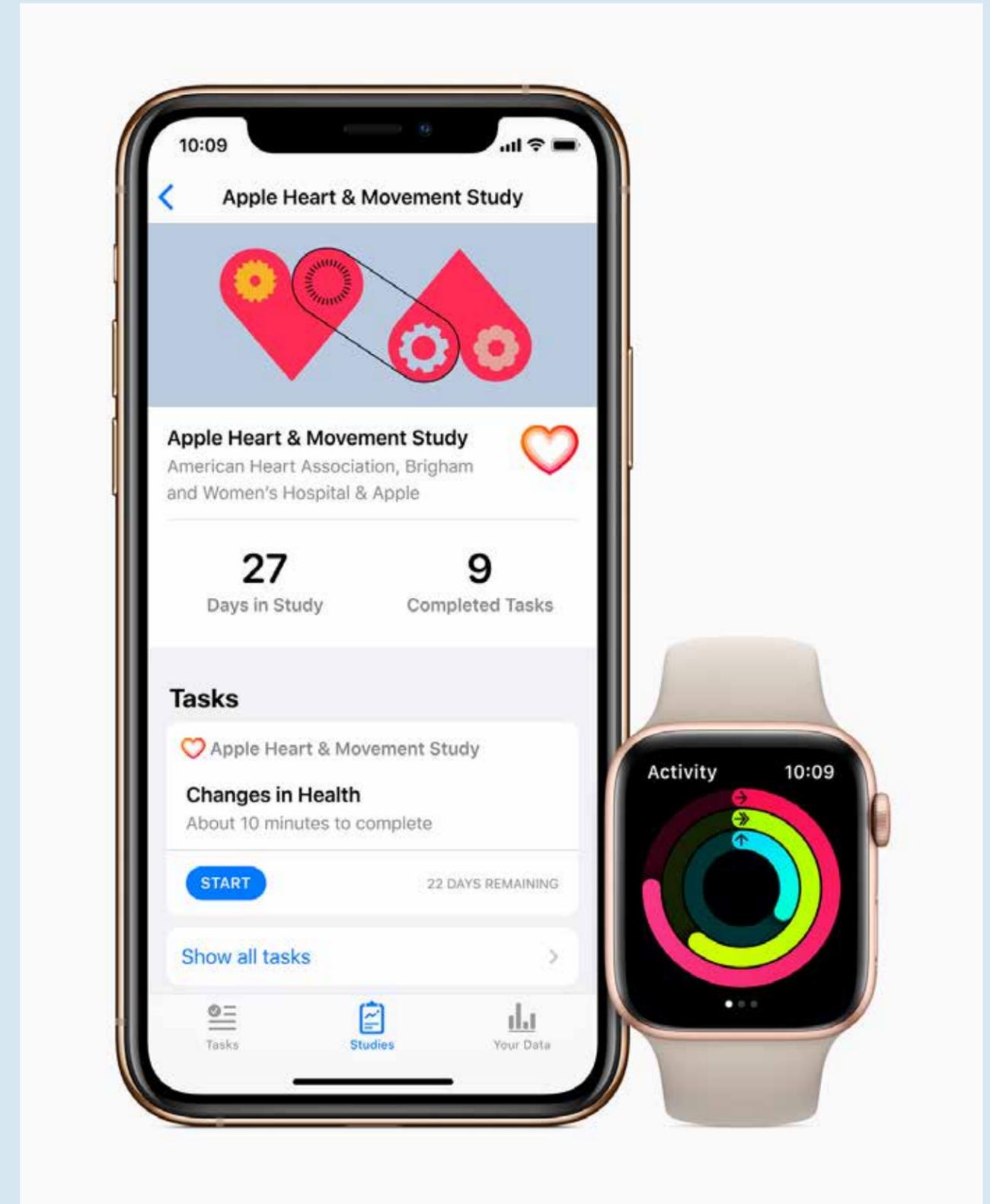
Big Tech health

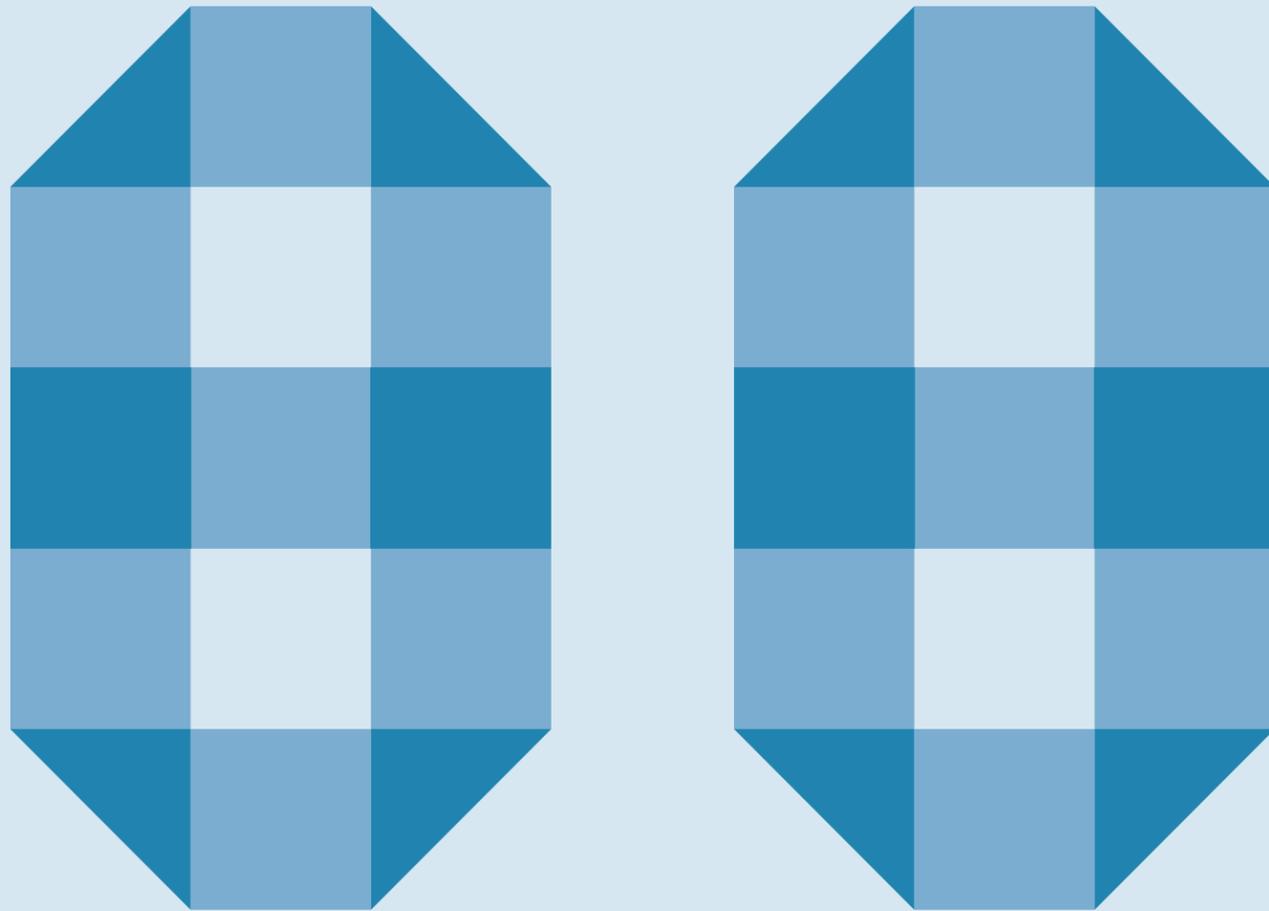
Big Tech's next frontier? Taking on the labyrinthine US healthcare system.

Several tech giants have dived into health in recent months, with mixed reactions given tech's growing monopoly on society's infrastructure.

Apple announced in November 2019 that its Research app is partnering in three health studies that it describes as “landmark”: the Apple Women’s Health Study, the Apple Heart and Movement Study, and the Apple Hearing Study. The multiyear, longitudinal studies are being conducted in partnership with academic and research institutions—for example, the Harvard TH Chan School of Public Health and the NIH’s National Institute of Environmental Health Sciences are partnering Apple for the Women’s Health Study, and the Brigham and Women’s Hospital and the American Heart Association are participating in the Heart and Movement Study. Participants can enroll in the studies via the Research app. Apple says that they “can contribute to potentially groundbreaking medical discoveries with iPhone and Apple Watch, and help create the next generation of innovative health products.”

However, writing in the *New York Times*, Natasha Singer mused that, alongside the fact that Apple’s products tend to be owned by higher-earning consumers,





potentially skewing the results of the studies, “there are also some concerns that Apple, which has already reshaped how people live, communicate and entertain themselves, is pursuing yet another way to influence society, this time through health.”

Google is targeting the health market, too. In November 2019, fitness wearables company Fitbit announced that it had agreed to be acquired by Google, in a deal that valued the company at \$2.1 billion, with the transaction expected to complete in 2020. “Google is an ideal partner to advance our mission. With Google’s resources and global platform, Fitbit will be able to accelerate innovation in the wearables category, scale faster, and make health even more accessible to everyone,” says James Park, cofounder and CEO of Fitbit.

Analyzing why Fitbit’s healthcare connections are likely to have attracted Google, Patrick Lucas Austin wrote in *Time* that Fitbit already works with “insurance companies, other firms and even the government of Singapore to provide customers, employees, and citizens with fitness trackers in what are likely lucrative deals,” adding that, “for Google, Fitbit’s healthcare ties, along with its established base of users, might be exactly what it needs to give its wearable device strategy a shot in the arm.” The *Time* article also points out that, according to a Statista estimate, “the healthcare tech space could be worth \$24 billion by 2020.”

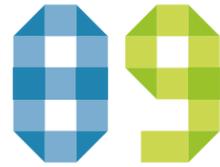
Not to be left behind, Amazon has launched Amazon Care, which the company bills as “the best of both virtual and in-person care.” Currently being piloted for Amazon’s own employees in the Seattle area, the service provides general healthcare services, such as help with colds, allergies and infections, contraceptive consultations and STI testing, and prescriptions delivered to the door, with both in-person visits at the home or office and remote consultations. TechCrunch observes that, while Apple also offers remote and on-premises



healthcare for its employees, Amazon Care is notable given that it's "much more external-facing than those offered by its peers in Silicon Valley, with a brand identity and presentation that strongly suggests the company is thinking about more than its own workforce when it comes to a future potential addressable market for Care." Pointing out that Amazon acquired Health Navigator, an online symptom-checking and triage tool, in October 2019, CNBC wrote that "if Amazon Care succeeds among employees, the company could someday sell it to millions of people who already rely on Amazon for their groceries, entertainment, and more."

Why it's interesting:

Having overhauled almost every aspect of human existence, Big Tech is now setting its sights on the healthcare market. While there's no doubt that these tech giants' prowess in creating seamless interfaces could positively impact the often difficult-to-navigate US healthcare system, questions over privacy and the use of customers' data loom. Fitbit says that, following the Google acquisition, data will not be sold or used for ads, while Apple says that consumers can tailor the data they share with its studies. However its moves are viewed, it's clear that Silicon Valley is firmly staking its claim in the healthcare market.



Beyond cars

America, the country that pioneered mass production of the automobile and created a car culture of road trips and drive-in restaurants, is seeing the development of its first purpose-built car-free neighborhood.

Culdesac Tempe is a new neighborhood in Arizona that broke ground in late 2019. It is set to open in fall 2020 to 1,000 renters who must agree not to own a car. Culdesac bills itself as “the world’s first post-car real estate developer,” and its \$140 million project will boast a dog park, market hall, grocery store, gym and restaurants.

Culdesac aims to promote a lifestyle that’s both good for the environment and good for people, with an abundance of shaded paths to encourage walking, scootering and biking. There are plans for light rail to connect it to downtown Tempe, Arizona State University and the airport. Emergency vehicles and delivery services can still get in, as well as a small fleet of shared cars.

This resonates with a clutch of other cities around the world which, for health reasons, have banished cars from their centers. These include Oslo—which early in 2019 removed 700 parking spots downtown to discourage driving—Madrid and Fazilka, India.

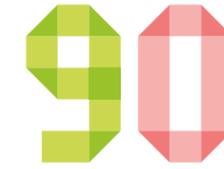
In 2011 an article in the *Journal of Public Health*, published by Oxford University Press, mused “Are cars the new tobacco?” and drew a direct link between car culture and physical inactivity, obesity, cardio-vascular disease from air pollution, death and injury from crashes, and climate change. Since then, there have been renewed efforts around the world, mostly by governments, to curb air pollution from vehicles and get people walking and pedaling.

In 2021, New York will become the first US city to impose a congestion charge for driving downtown at peak hours, following cities such as London and Singapore. Beijing holds a lottery for new car license plates, with more slots for electric vehicles than conventional ones, and requires every gas-powered vehicle to remain idle one day a week, with the day determined by the last digits of its license plate.

In 2019, New Delhi began restricting cars to alternate days on the road, also based on license plate numbers, after toxic pollution left people with smarting eyes and resulted in schools being closed. In Singapore, the government is heavily subsidizing workplace showers and changing rooms so people who walk, run or cycle to work can freshen up before clocking in.

Why it’s interesting:

For decades, urban design has been dictated by automobiles, with space set aside for street parking and with the development of ever more sprawling suburbs. But the growing realization of the ill effects of too many vehicles has brought a tipping point. Young people are less interested in owning cars, partly because of cost and partly because of the ease of ride-hailing, preferring to spend their money on experiences and travel. For Culdesac’s founders, the car-free experiment in the college town of Tempe is just a start. Ultimately, the company hopes to build the first car-free city in the United States.



Death doulas

A swathe of innovative services is driving a wellness-centric and eco-friendly approach to death.

According to Statista, in 2019 funeral homes in the United States alone generated revenue of \$17 billion. The industry, which has seen little innovation over the past century, is primed for an overhaul. From new-age funeral homes to end-of-life coaches, newcomers are shaking up the sector and re-examining taboos and traditions surrounding the end of life.

Death doulas, also referred to as death midwives, are increasingly recognized as modern care practitioners, driving a raft of official training and certification programs. In 2019, the University of Vermont's College of Medicine became the first university department to offer an end-of-life doula professional certificate program, becoming part of a roster of global organizations including the International End of Life Doula Association (INELDA), the Art of Dying Institute, the Conscious Dying Institute and End of Life Doula UK.

Recompose is a new kind of after-death facility, slated to open in spring 2021 in Seattle. It will be the first facility to offer a sustainable option to traditional burial and cremation. Recompose will offer a proprietary system for corporeal composting, which "gently converts human remains into soil, so that we can nourish new life after we die," says the Recompose website.

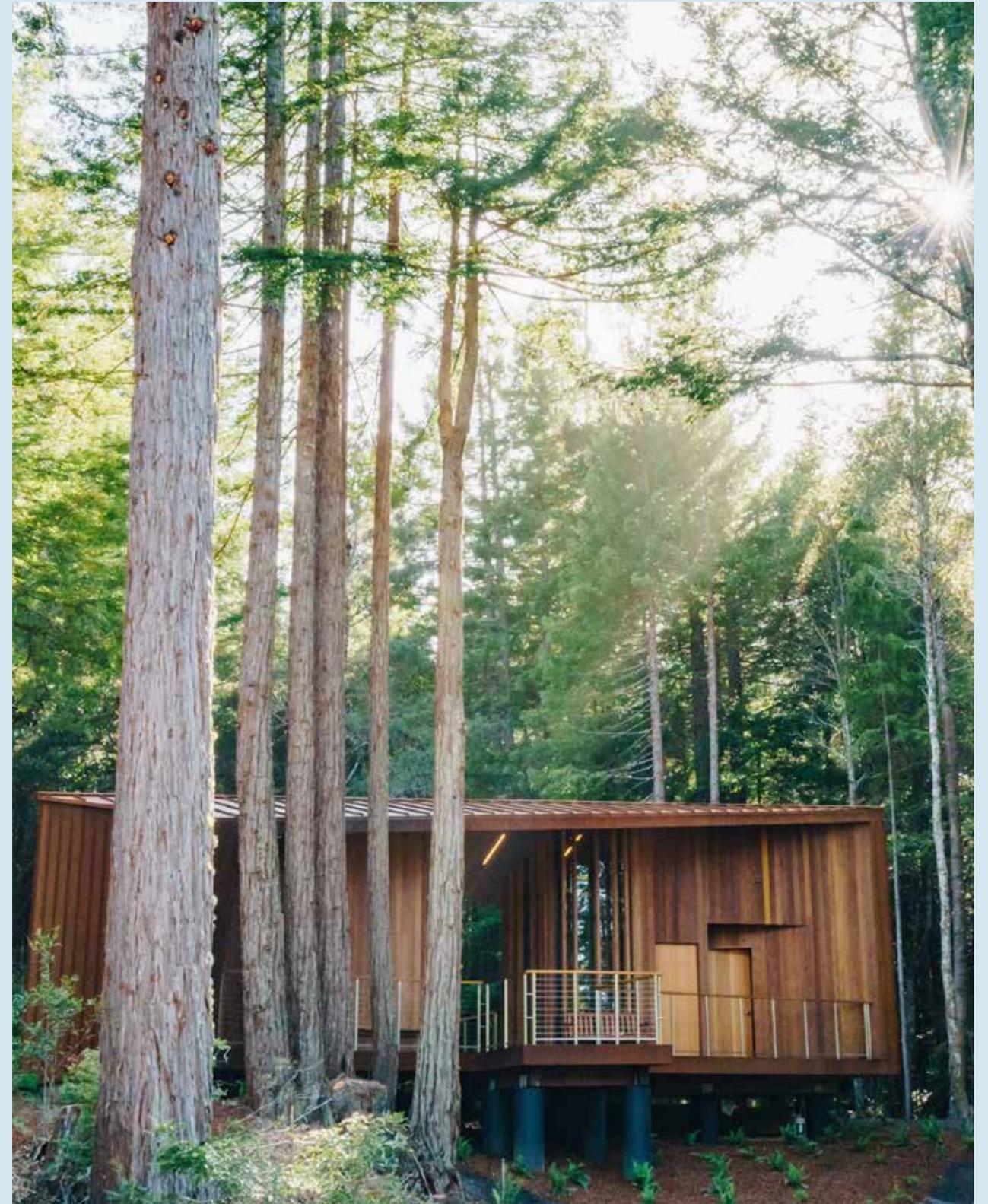


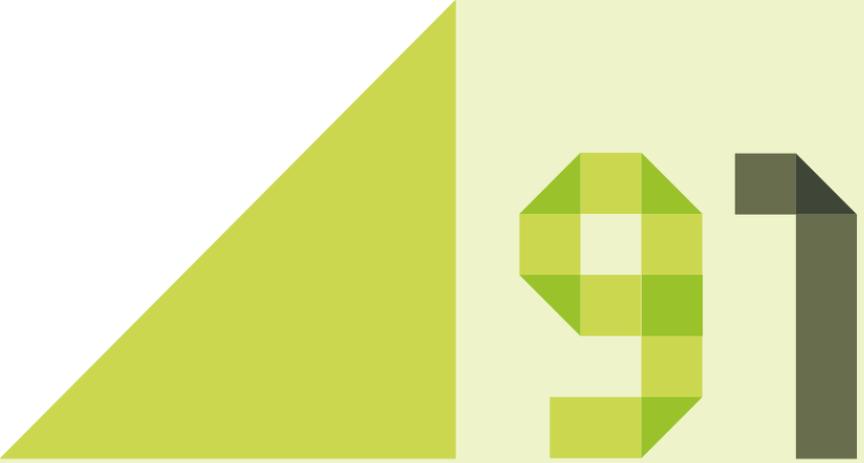
“I started looking at the sort of relationship we have to death in this society,” Recompose CEO and founder Katrina Spade told WBUR radio station, “and I started to think about whether we could have places in our cities where we had a more conscious relationship with death and could think more about our mortality and our place in the natural cycles.”

Exit Here opened in London in October 2019. It is a nouveau funeral parlor overhauling the funeral planning process. Founded by restaurateur Oliver Peyton, it offers “a previously unavailable level of service, choice, flexibility and attention to detail.” Exit Here was created to put the individual first, with a full service experienced in a polished, dignified and ultra-modern package—including caskets and urns designed in house. “From religious beliefs to the environment, today we have a much more individual and informed view on life,” says the parlor’s website. “Exit Here has been created to reflect that individuality and offer choices that weren’t there before.”

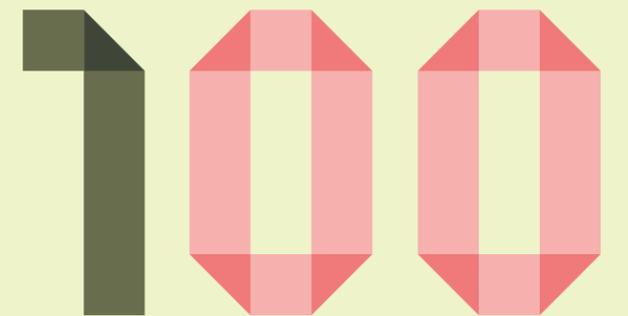
Why it’s interesting:

The growing interest in dying well is giving rise to this death-positive movement, ushering in new end-of-life services. As the Global Wellness Institute notes in its 2019 trends report, “finally, a ‘better death’ is becoming integral to a ‘well life.’”





Finance



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New faces of finance

Fintech is reinvigorating the stuffy financial sector with new branding that taps into pop culture and has unlikely brand ambassadors.

Klarna, the Swedish online payments company famed for its disruptive “shop now, pay later” business model, is on a mission to remove financial friction for consumers—or, in the brand’s words, “make shopping smooth” (yes, the third “o” is intentional). In January 2019, Klarna doubled down on this sentiment with an unconventional and provocative move, announcing rapper Snoop Dogg as brand ambassador and minor shareholder.

Snoop Dogg is “arguably the smoothest man alive,” and is a great match for the company, says Daniel Jontén, VP marketing at Klarna, adding that “he allows us to convey our mission in a new and creative way.” Together they devised the campaign “Get Smooth” and consequently rebranded Snoop Dogg as Smooth Dogg. The rapper is put into unique (and sometimes cheekily outlandish) scenarios that emphasize the smoothness of making online payments with Klarna—think pink silk robes, glossy Afghan hounds and golden peanut butter. “Klarna and Snoop’s smoothness, as well as quirky worlds and visual expressions, harmonize perfectly,” says Jontén. “It is a great way for Klarna to plunge into pop culture, becoming a global topic of conversation.”



FINANCE

The “Get Smooth” campaign led to the March 2019 launch of products that are featured in the ads, including a silky bed set, cashmere toilet paper and a “smooth robe.” From the marketing language to the payment model, Klarna has gained popularity among millennials and generation Z, who value convenience, flexibility and financial control.

Launched in 2005, Klarna went through a radical rebrand in 2017, stripping away its early visual identity and communication, which was “closely aligned with the vast majority of the financial industry—blue and monotonous,” says Jontén. The strategy has paid off. Klarna is now the largest private fintech



company in Europe and is valued at \$5.5 billion. It has 70 million shoppers, and partners with 170,000 retailers to offer seamless purchasing.

Why it's interesting:

Even as lifestyle and culture evolve, little has changed in traditional banking to keep up with consumer trends. Fintech companies such as Klarna have found success by revitalizing conventional payment models while referencing pop culture to become a consumer-led brand.



Carbon credit

Imagine a world where every transaction impacts on an individual's carbon footprint score.

That vision is not too far off, as new systems are being implemented to heighten consumer awareness and shift a sustainable mindset to one that is actionable.

Consumers say they want to live more sustainably and do less harm to the planet. But acting on that desire can be difficult. For instance, 89% of US and UK consumers say they recycle at home yet only 52% always do so, and 85% say they avoid single-use plastics but only 20% do so on every occasion, according to SONAR™ research in Wunderman Thompson's "New Sustainability: Regeneration" report. Now businesses and governments are coming up with tools to nudge consumers to do the right thing.

In spring 2019 Swedish fintech company Doconomy introduced a no-nonsense credit card that cuts off spending when you reach a carbon limit, rather than a financial limit. The Do Black credit card tracks the carbon footprint of each purchase and stops working when a user is deemed to have hit their monthly limit. Calculations for the limit are based on the United Nations' 2030 carbon reduction target, and the amount of a user's limit is roughly half of the per capita carbon dioxide currently emitted by citizens of developed countries.



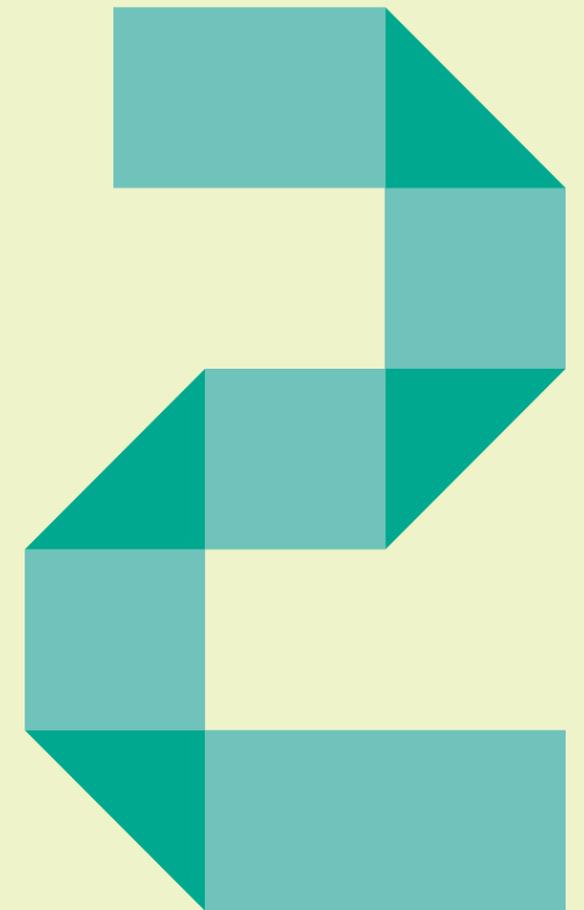
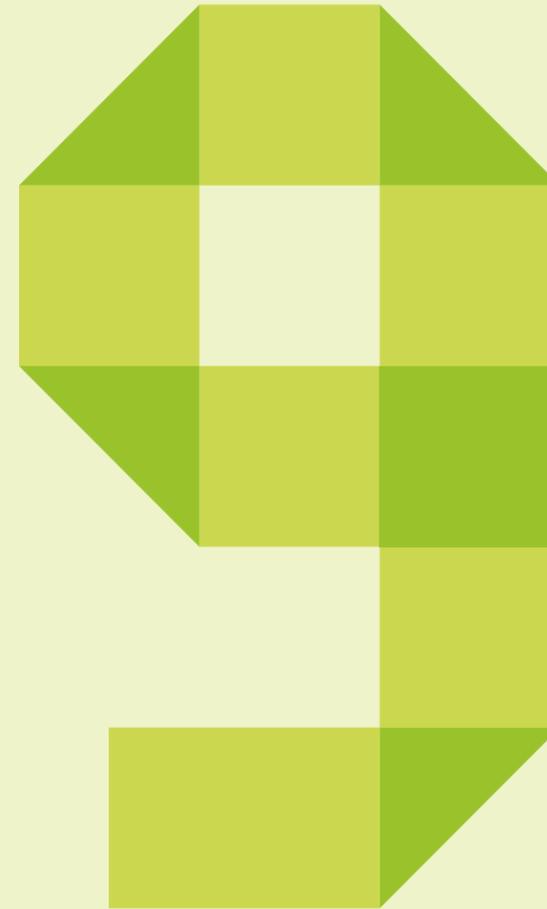
Doconomy also offers a way for users to purchase additional credit by buying units in climate-friendly projects in developing countries. But this “should not be used as an indulgence for further consumption,” its website says. The startup, which bills itself as the “world’s first mobile banking service for everyday climate action,” also offers a Do White credit card that simply tracks a user’s carbon footprint without imposing a carbon limit.

Governments are also facilitating sustainability. Helsinki, Finland, launched the Think Sustainably platform in mid 2019 to give residents, visitors and business owners tools to assess their daily behavior and make greener choices. From a think tank called Demos Helsinki, the platform rates local restaurants, galleries and attractions according to criteria including their greenhouse emissions. It also takes into account waste management, protecting biodiversity, accessibility and employment and preventing discrimination.

Other cities that are taking significant action on sustainability include Copenhagen, Denmark, where planners envision a city that is carbon neutral by 2025. The former industrial neighborhood of Nordhavn is being transformed into a “five-minute city” in which getting anywhere—to school or shops, for example—should be no more than a five-minute walk, to discourage driving. Oslo, Norway, is aiming to become carbon neutral by 2050 and Stockholm, Sweden, intends to be fossil-fuel free by 2040.

Why it’s interesting:

According to SONAR™, Wunderman Thompson’s proprietary research tool, 92% of consumers are trying to live more sustainably and 79% are conscious of their personal impact on the planet. But knowing how to put this into action can be a challenge. These new tools—from credit cards to sustainable city guides—can be useful for turning green intentions into actual green behavior.





Data: the new currency

Consumers are recognizing the value of their data—and rebelling against brands that harvest it for free.

“Data has become the most valuable asset on planet Earth, yet all of us as individuals, the people that produce that asset, have no rights to its value at the moment,” data transparency advocate Brittany Kaiser, former Cambridge Analytica business development director and author of a whistleblower book about the company, tells Wunderman Thompson Intelligence.

Historically, brands relied heavily on data to learn about their consumers, and to date it’s been freely collected. Recently, consumers have been starting to realize the value of what they’re providing—and are pushing back. Asked to value on the information they’re giving brands, US consumers priced demographics at \$87 per month, digital behavior at \$105 per month, purchase data at \$200 per month, location data at \$375 per month and biometrics at \$550 per month, according to SONAR™ research conducted in September 2019 by Wunderman Thompson. The research reveals that 91% of consumers wish companies were more explicit about how they use consumer data and 89% think that companies are deliberately vague about data exchange terms.



If you own your data like your property, you have all the legal recourse to protect your property.

Brittany Kaiser, data transparency advocate



Kaiser believes a property rights framework is required to regulate data usage and incentivization. “If you own your data like your property, you have all the legal recourse to protect your property. And if anybody wants to use your property—be it the government or a corporation—you should get to know what they’re using it for, how they’re using it and be compensated for that,” she says. “The right to property is a basic human right.”

Why it’s interesting:

As data complexity increases, so too does the need to provide greater oversight and regulation around managing and maintaining that data—marking a momentous shift in the traditional brand-consumer value exchange.

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Biometric payments

Cash in hand takes on new meaning with the rise of biometric payments.

In 2018 consulting company Goode Intelligence predicted that more than 1.2 billion people would be using biometric payments by 2020. Advances in technology are allowing biometric scanning to be rolled out around the world, leading to increased payment security and more seamless transactions.

In April 2019, NatWest bank in the United Kingdom ran a pilot with 200 customers to test its new biometric fingerprint card. Customers register their fingerprint on their card and the fingerprint is stored locally so no biometric data is held by the bank. The card can then be used at any till with contactless payments, including purchases over £30, the usual contactless limit. By continuing to use cards for each payment, stores will not have to update their contactless-enabled card machines.

Getting rid of the card altogether, in September 2019 Fingopay launched its new finger vein ID recognition payment system at Copenhagen Business School's Spisestuerne café. Fingopay spent a year trialing the technology, and its payment system allows students and staff to register their Dankort, Visa or Mastercard with their fingertip at the till and then pay seamlessly going forward.





As vein patterns leave no trace and cannot be copied, it has been hailed as the ideal biometric for high-security authentication such as payments and identification.

Simon Binns, CMO, Fingopay

“As vein patterns leave no trace and cannot be copied, it has been hailed as the ideal biometric for high-security authentication such as payments and identification,” Simon Binns, CMO of Fingopay, tells Wunderman Thompson Intelligence.

San Francisco-based Incode is looking to make online payments more secure using facial recognition. Through its Incode Check product, launched

in October 2019, consumers can use their face to verify online payments. This helps to secure transactions that credit card companies could potentially deem fraudulent.

Why it's interesting:

As more and more consumers expect seamless transactions across all touchpoints, biometric payments will deliver both on ease and security.



Financial therapy

Increasing financial insecurity is leading to a rise in financial therapy, which helps people get to grips with the emotional issues linked to money worries.

According to a Gallup poll released in April 2019, 25% of Americans worry “all” or “most” of the time that their family income will not meet their expenses, while 26% say they are “just making ends meet.”

In November 2019 in the United Kingdom, the Money and Mental Health Policy Institute launched the Money and Mental Health Manifesto 2019. It was a call to politicians ahead of the UK’s December 2019 general election to address issues such as “the link between suicide and financial difficulty,” and recommends making money-related advice available as part of the mental health services provided by the British National Health Service.

Research psychologist Dr Galen Buckwalter spoke to *Goop* about the issue of financial post-traumatic stress disorder (PTSD), which he defined as “the physical, emotional and cognitive deficits people experience when they cannot cope with either abrupt financial loss or the chronic stress of having inadequate financial resources.”

Amid these feelings of financial insecurity, financial therapy is on the rise. This growing field helps people to untangle the emotional issues that lie beneath their financial decisions. Nicolle Osequeda, a Chicago-based financial therapist, told *Fast Company* that “there is a lot of emotional, historical value tied into money and our relationship with money, and we need to talk about those things before someone can make changes or follow a plan.”

In tandem with this more holistic approach to financial advice, financial services that take into account the emotional aspects of money are launching, too. Buckwalter in *Goop* points to Happy Money (in which he is an investor). The company says it “helps borrowers become savers.” Following Happy Money’s \$70 million funding round in September 2019, the company’s founder and CEO, Scott Saunders, told *Cheddar* that its research found “about a third of millennials have the equivalent of PTSD-like symptoms from their finances.”

Saunders explained that the company makes loans at low interest rates “to help people eliminate high-interest credit-card debt faster and cheaper,” working with “a national network of credit union partners.” He added that Happy Money is “in business to take debt out of the world.”

Why it’s interesting:

Emotional and mental health remain at the forefront of national conversations, so it’s no surprise that the thorny subject of financial health is getting more attention, with specialist financial therapists increasingly untangling financial and emotional issues. Services such as Happy Money illustrate a shift in corporate stance that, rather than profiting from keeping consumers stuck in debt, recognizes its emotionally debilitating effect and helps them break free.

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Gen Z finances

Teaching financial literacy to a digital-native generation.

As Wunderman Thompson Intelligence reports in its “Into Z Future” study, even the youngest members of generation Z are entrepreneurial and many are earning big bucks. In the United Kingdom in 2018, children aged between six and 18 earned £4.5 billion, and have savings of over £550 million, according to the GoHenry “Youth Economy Report.”



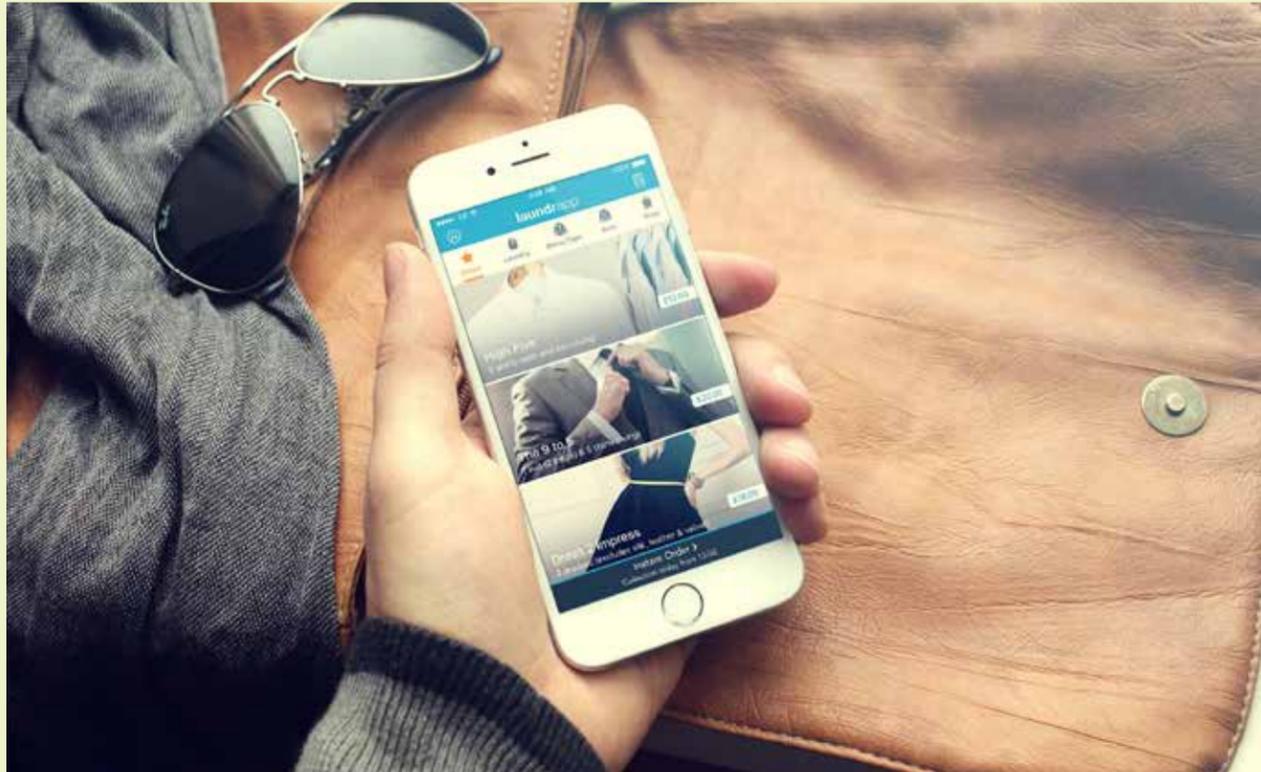
Startups, many backed by large financial institutions, are stepping in to teach young adults to be financially savvy in a digital-first way.

Greenlight is a US-based debit card and app which aims to teach kids and teens about financial literacy. Parents can monitor kids’ spending through the app, adding money when needed and limiting the venues where it can be spent. “In the near future, I hope that this generation of kids grow up to spend wisely, learn the importance of saving and feel confident investing to build wealth over the long term,” says Tim Sheehan, Greenlight CEO and cofounder.

Other fintech companies are expanding their offerings into the teen and youth market. UK-based Revolut’s Revolut Youth card was reportedly imminent when this report was written, along with a corresponding app. In 2018, Monzo launched a youth account for customers aged 16 and 17, with plans to expand to younger audiences currently in the works.

Why it’s interesting:

As financial transactions become increasingly digital and intangible, today’s youth will need to learn the value of a dollar without ever having to touch one. Financial literacy apps can equip gen Z and those even younger with the tools to handle their digital financial futures.



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Single spending

With the increase in singles comes the rise of single spending.

For too long, marketers have focused on traditional life stages, with carefree youth followed swiftly by marriage and family life. That's no longer a reality for many. "Single people represent an economic powerhouse, a force that can reshape markets with new needs and new standards of living," declares "The Single Age," a recent report from Wunderman Thompson Intelligence.

Single people buy houses, spend significant amounts on travel and tend to be better educated than their married counterparts. The trend is especially pronounced among women, who are increasingly financially self-sufficient. According to the Harvard Joint Center for Housing Studies, women made up more than half the single population in 2015, while the National Association of Realtors showed single women bought homes at twice the rate of single men in 2017.

“Businesses are finally starting to address the “single tax,” the costs that come with not having a partner with whom to split bills.

Singledom is also up globally. Eurostat figures show that in Sweden, Denmark, Finland and Germany, single households accounted for more than 40% of all households in 2016. In China, the percentage of single adults grew from 6% in 1990 to almost 15%, or 200 million people, in 2017, according to China’s Ministry of Civil Affairs. In Hong Kong, single women are buying homes to the point where they are a primary driver of gentrification.

Perhaps the most overt commercial celebration of singles is Alibaba’s Singles Day, held each year on November 11. It is now the world’s biggest shopping festival, hitting sales worth a record \$38 billion in 2019.

Still, the “single tax,” a term coined to describe the costs that come with not having a partner with whom to split rent, a mortgage or a healthcare premium, remains a real problem—and businesses are finally starting to address it.

Apps are popping up in many cities to support single life; from food deliveries to services such as Laundrapp in the United Kingdom, which picks up and drops off laundry and dry cleaning, and TaskRabbit, which outsources household tasks.



A recent *Refinery29* article offered tips for avoiding the single tax, such as sharing Netflix, Spotify and other accounts with family; going on holiday with friends to split room costs; and batch-cooking and freezing to save on food bills.

Why it’s interesting:

Singles today are not shy about wielding their financial power. According to a survey of 3,000 respondents across the United States, United Kingdom and China commissioned by SONAR™, Wunderman Thompson’s proprietary research tool, over 80% of American singles enjoy the fact that they can make all of their own financial decisions, and over 85% agree that making their own financial decisions is empowering. Whether the offer is innovations in coliving, single dining or solo travel, businesses that recognize and cater to this economically powerful demographic will come up tops.



New payment gestures

New payment options are making checkout more frictionless than ever.

Amazon engineers are working on a card-free, phone-free biometric system code-named Orville that will let shoppers at Whole Foods settle their bills with a wave of the hand. Orville, currently still at the test stage, uses scanners designed to recognize an individual hand using computer vision and depth geometry—shoppers would not need to physically touch the device or use their fingerprint.

This means an ultrafast and consequently more pleasant in-store purchasing experience—an Orville transaction should take less than 300 milliseconds on average, compared to the three to four seconds it takes to use a card, the *New York Post* reported.

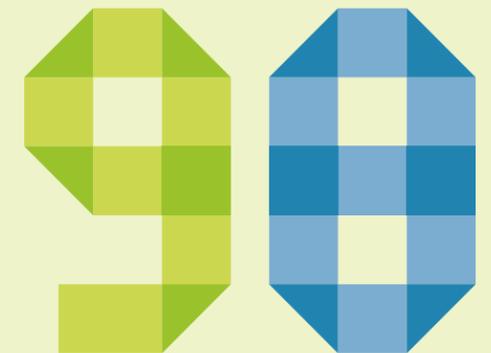
And frictionless payments will likely mean monetary perks for retailers as well. “People tend to spend more when they don’t have the experience of touching something tangible like money,” Majd Maksad, founder and CEO of Status Money, a personal finance site, told the *New York Post*. “The utility of money becomes more ephemeral.”

While this kind of transaction could still involve a cashier, Amazon and a handful of other technology companies are in a race to implement cashierless stores. Cashierless convenience store Amazon Go already operates in 21 locations around the United States and in November 2019 announced plans to open larger cashierless grocery stores—and potentially license the technology to other retailers.

In September 2019, technology startup Trigo raised \$22 million for its checkout-free endeavors, which, like Amazon Go, use cameras and sensors that track shoppers as they move around the store. Trigo technology will first be used by Shufersal, Israel’s largest supermarket chain. Supermarkets that use Trigo’s technology will be able to implement cashierless payments and also use data aggregated from shoppers’ in-store activities to create personalized experiences and loyalty programs.

Why it’s interesting:

The leather wallet has seen better days. Advances in payments technology are giving retailers the tools to almost completely remove pain points in the in-store transaction experience for discerning digital natives. Companies now only need to get more customers and regulators completely on board with biometrics. In the meantime, less invasive alternatives to facial recognition, like hand-gesture payments or cashierless stores, might gain more traction.



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Subscription-based insurance

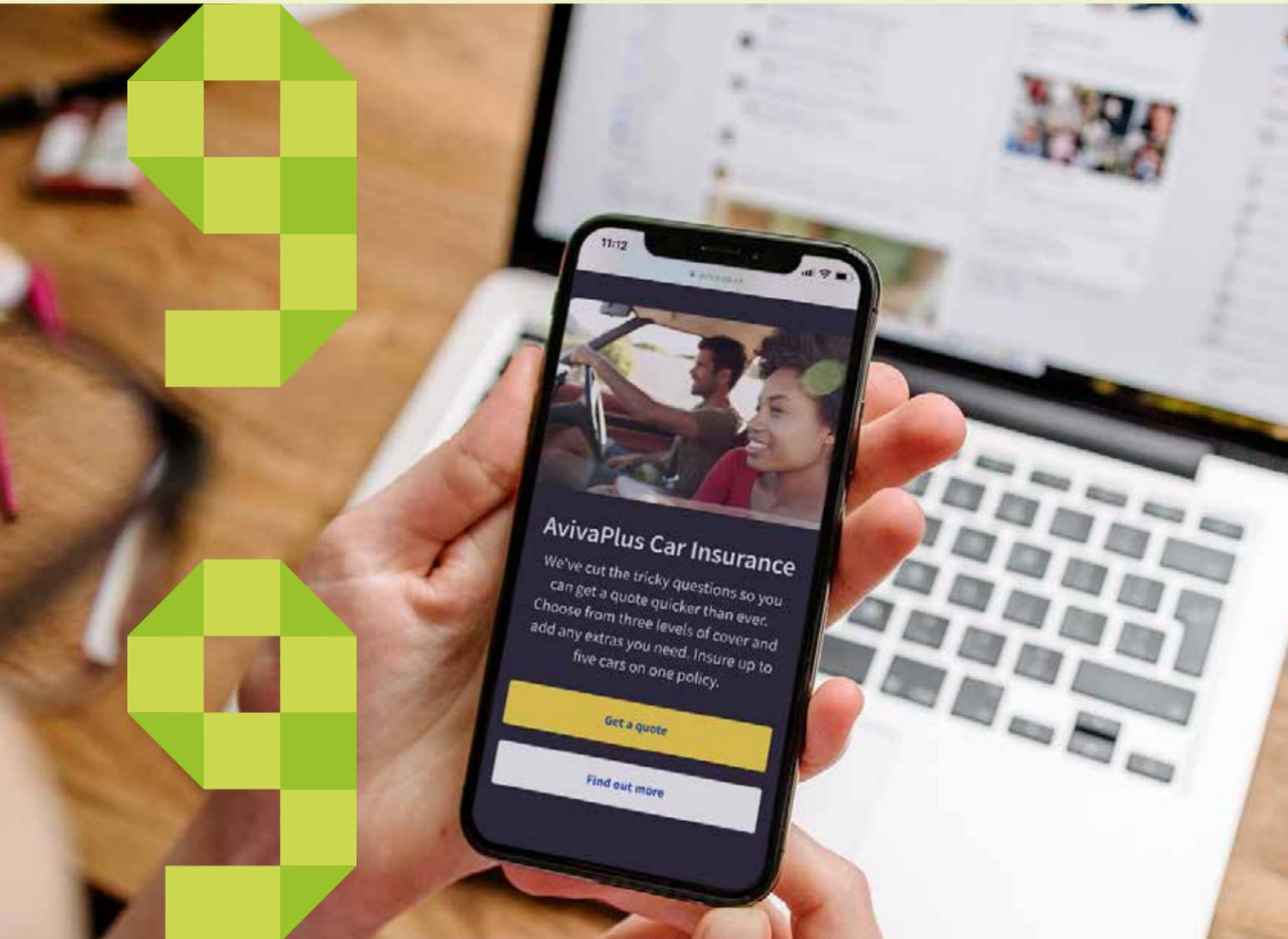
Insurance companies are realizing that the important millennial and gen Z markets don't conform to life stages in the same way as previous generations.

The insurance industry, traditionally slow to change, is dipping a toe into the subscription model that has become the norm for millennials and generation Z.

The open-ended nature of accessing services by subscription, from Netflix to clothing to personal care products, has become the new norm for younger generations. Almost 33% of millennials are members of at least one retail subscription service, according to MarTech Advisor.

The insurance industry is starting to catch up. In the United Kingdom, HSBC introduced Select and Cover in November 2019. This subscription insurance service allows customers to select between three and seven different kinds of policy, including motor breakdown, mobile phone, home emergency, and gadget cover. Subscribers, who must be HSBC account holders, can change their options annually as their needs shift. The monthly fee starts at £19.50 (around \$25) and can be canceled at any time, at no cost.

HSBC's Select and Cover launch follows AvivaPlus's UK debut in 2018, when *Which*, the impartial product-review platform of the UK's Consumers'



Association, compared its monthly insurance payment model to that of a Netflix subscription. The monthly payments are interest free, existing customers are guaranteed the same or a better price than an equivalent new customer when they renew, and the subscription can be canceled without incurring a fee.

AvivaPlus offers home or car insurance with three tiers of cover. “Like subscription services, it’s designed to make it easy for customers to change their cover as often as they want without incurring charges,” says Andy Briggs,

Aviva’s UK insurance CEO, adding that Aviva has “worked with thousands of customers to understand how insurance could better meet their needs and provide the flexibility they want for their modern lives.”

In Brazil, São Paulo-based startup Kakau has launched a home insurance subscription service following a similar model.

British insurance company Urban Jungle focuses on renters’ needs, offering what it describes as a flexible, pay-as-you-go monthly policy “designed specially for renters.” Monthly contents cover starts at £5 (around \$7). In May 2019, the company announced a £2.5 million (\$3.2 million) seed funding round, stating that it had been “working closely with underwriters to remove many of the legacy home-owner questions renters are asked when taking out a policy,” making its policies easier to understand and better suited to “generation rent.” The company added that it intends to “stay with its customers as they grow and experience new life stages—many of which will happen while they’re still renting” so it will further expand its insurance product in the future.

Why it’s interesting:

Insurance companies are realizing that the important millennial and gen Z markets don’t conform to life stages in the same way as previous generations. As a result, they’re devising new products that are easier to understand and meet the ever-changing needs of young consumers who are reluctant to commit to long-term contracts. According to a 2019 First Insight report, “millennials continue to be the dominant force in retail both in the United States and the United Kingdom, as their shopping habits can be a deciding factor in what makes or breaks the success and longevity of retail models.” With that in mind, insurance brands are shifting their focus to woo the vital younger generations.

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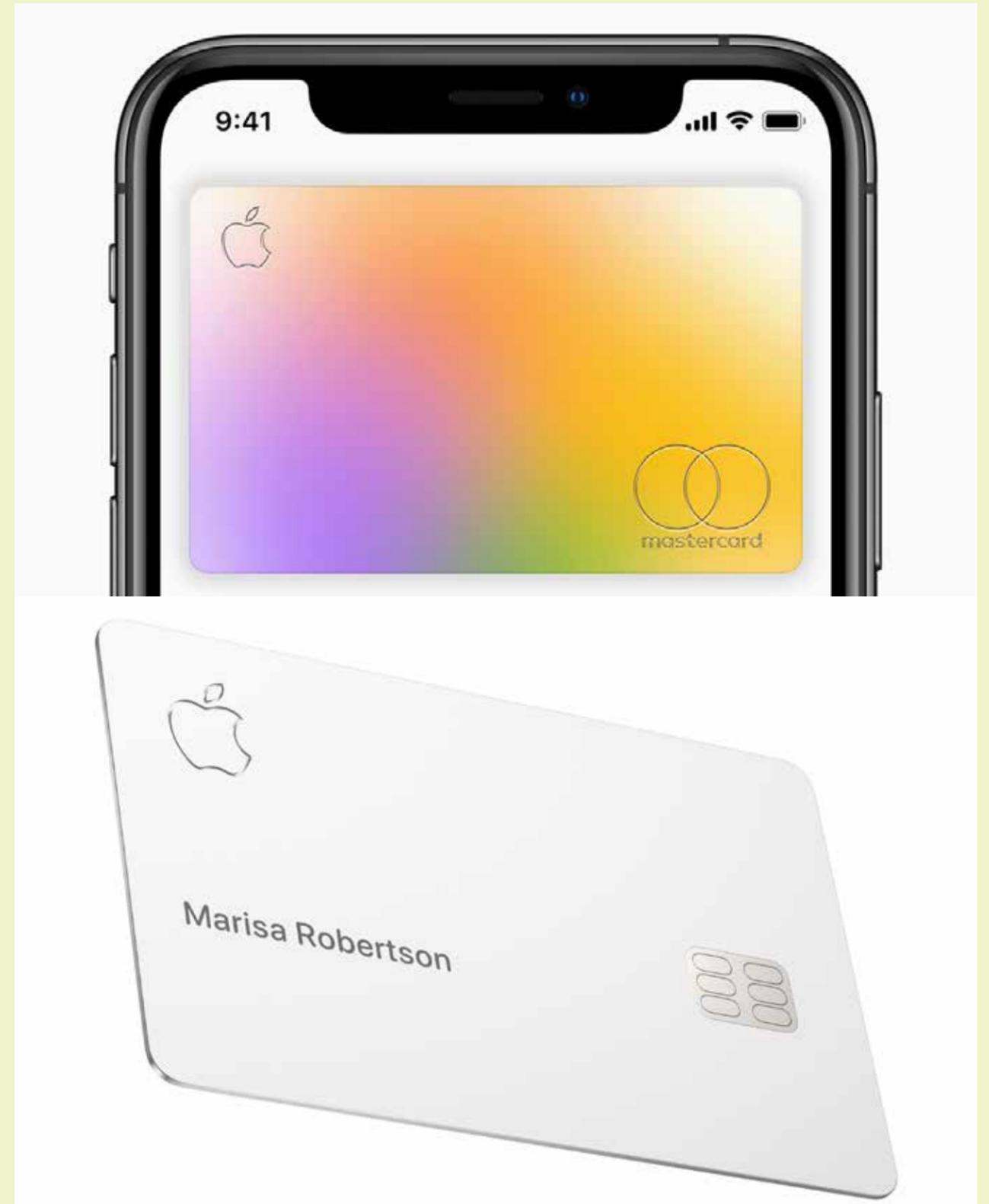
Branded payments

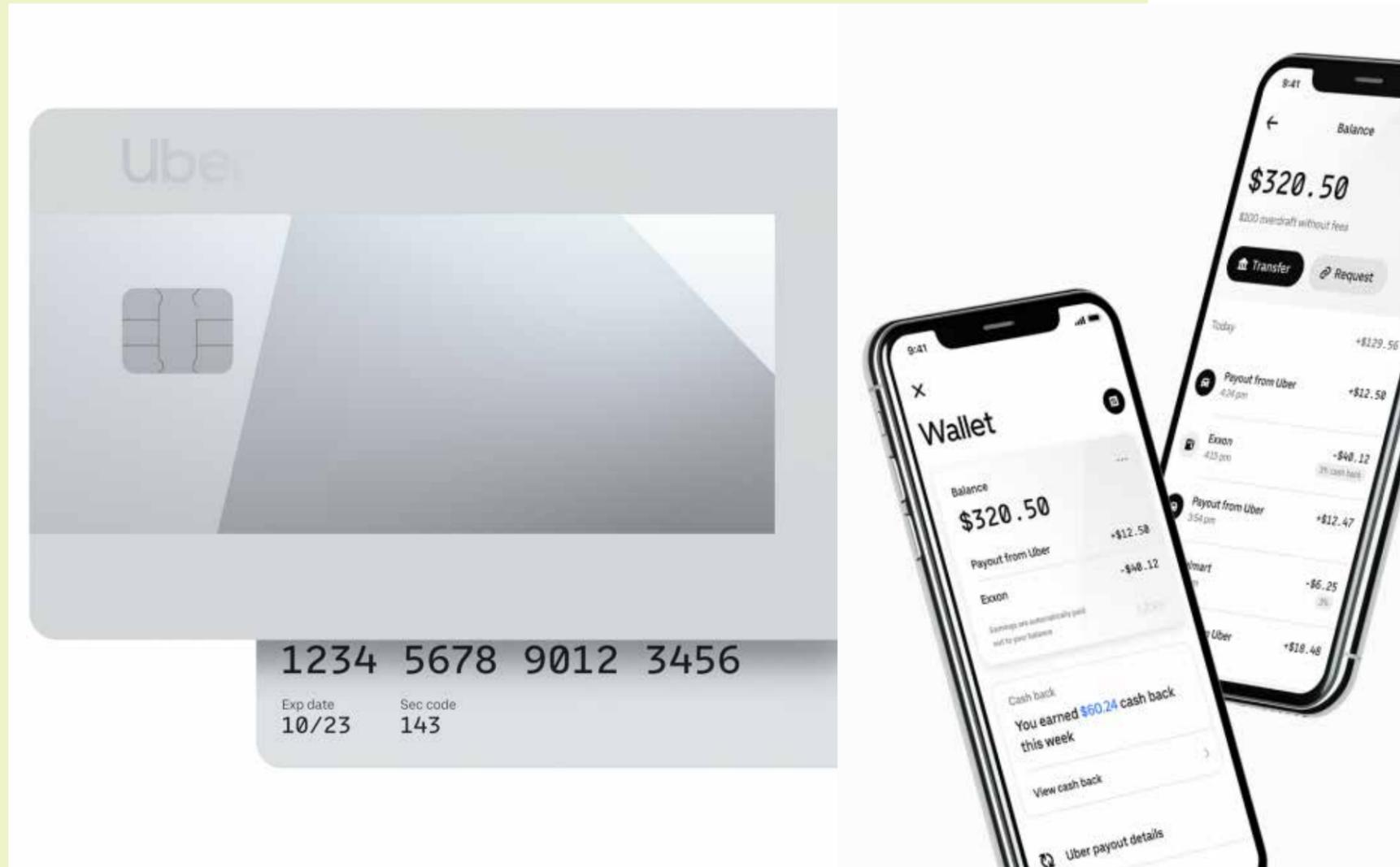
Big Tech is looking to the world of finance—but trust remains an issue.

From transportation to entertainment, Big Tech has had its hand in almost all the cookie jars of consumerism, making its pervasive reach hard to ignore. Do consumers trust Big Tech enough to hand over their financial details?

In October 2019, Uber announced a new division: Uber Money. The banking initiative offers debit cards and improved payment options for drivers. A mobile banking account gives Uber drivers and couriers “real-time access to their earnings after every trip through the Uber Debit account,” the company says, rather than having to wait for weekly payments. The move also offers a digital wallet so “earners and spenders will now be able to easily track their earning and spending history, manage and move their money, and discover new Uber financial products all in one place.”

In August 2019, Apple released the Apple Card, a credit card backed by Goldman Sachs. The card is Apple’s attempt to do for banking what it did for





After finding success in lifestyle brands, the world of finance is a natural next step for these tech leaders.

computers and smartphones: upend the status quo with innovative, simplified, streamlined technologies. Apple positions the card as a simple, transparent way to bank, “designed to help customers lead a healthier financial life,” according to Jennifer Bailey, vice president of Apple Pay.

Although the card has met gender discrimination issues, its release marks a significant step for Apple into the world of finance. Alongside the Apple Card, Apple Pay continues to make significant inroads in the financial realm, processing \$1.8 billion in transactions in the first quarter of 2019.

And while Facebook Libra, the social media giant’s foray into cryptocurrency, announced in June 2019, seems to be unraveling, it’s another signifier of Big Tech’s relentless push into the fintech space.

Why it’s interesting:

After finding success in lifestyle brands, the world of finance is a natural next step for these tech leaders. Traditional banks, beware: despite hurdles, Big Tech brands are already starting to give the stodgy world of banking the Silicon Valley treatment.

About the Wunderman Thompson Intelligence

Wunderman Thompson Intelligence is Wunderman Thompson's futurism, research and innovation unit. It charts emerging and future global trends, consumer change, and innovation patterns—translating these into insight for brands. It offers a suite of consultancy services, including bespoke research, presentations, co-branded reports and workshops. It is also active in innovation, partnering with brands to activate future trends within their framework and execute new products and concepts. It is led by Emma Chiu, Global Director of Wunderman Thompson Intelligence.

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For more information visit: jwtintelligence.com

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Cover image: Still-life arrangement with flowers including sweet peas and clematis. Image courtesy of Phaidon Press