



How will you build back better?

As we transition into 2021, understanding consumer trends will be more vital than ever to make the right strategic decisions. At Foresight Factory, our role is to make trends meaningful, delivering different, better business answers so you can see beyond.

Every year, we release our highly acclaimed Trending report - our annual summary of the trends we think will shape the consumer experience – and commercial expectations – in the year ahead. Crucially, we don't just look at what's going on, but also what you can do about it and why.

We delve into the world of tomorrow so our clients can move forward with clarity, confidence and conviction today, incorporating the report's insights into their strategic planning.

Trending 2021 features five new and 10 energised trends, all grounded in robust consumer data from 27 markets, in-depth analysis, local commentary, case studies and recommended actions. This preview report gives you a deep dive into four key trends – Social Wellness, Retrospective Resolution, Building Resilience and The Stakeholder Consumer.

If you would like to uncover all of the trends, please do get in touch. We'd be happy to arrange a session with you and your leadership team to explore how the full report's insights can be actioned for your business.



Email Kerry Rheinstein at
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What should you look out for in 2021?

Let's start with the easiest prediction to make: the ongoing COVID-19 pandemic will cast a long shadow over 2021.

As hopes rise for the imminent arrival of effective and accessible vaccines, consumers will be impatient to get back to life as they knew it. But do not expect a rapid and wholesale return to pre-pandemic norms. Many of the trends, perspectives and routines adopted and accelerated through 2020 will remain relevant (especially as restrictions remain), and several pandemic-driven needs and anxieties will persist long after aspects of pre-COVID life resume. The 2020 experience will leave an indelible mark on the COVID Generation.

The COVID-19 economic fallout will cast a particularly long shadow over the future. In 2021, companies and consumers will prioritise the recouping of lost opportunities, while states everywhere will gauge how quickly pandemic debts can be recovered, and who – be it citizens, corporations or future generations – should ultimately pick up the tab.

As we transition to a post-pandemic world, brands can address priority needs and keep promises to “build back better”.

What are the priority needs for 2021? Consumers will look for certainty and resilience, presence-free commerce and connectivity, value in the aisles, escapist reverie (alongside hope for a safe and speedy return to IRL experiences), and a more holistic approach to wellbeing that considers social connections to be as important as hygiene, safety and nutrition.

Meanwhile, if your brand was among the many companies that promised to “build back better” from the crisis, then match commitments with action in 2021 – and align with the enduring needs for eco-positive, ethical and community-minded consumption.

A polarised political and social climate will prevail.

2020 saw widespread and heartwarming evidence of unity, cohesion and community resolve in response to the collective COVID-19 challenge. But the pandemic era has also been a divisive one. It has exposed pre-existing inequalities and created new discord – whether between old and young, the haves and the have-nots, the conspiracists and the supporters, the activists and the traditionalists.



As vaccines arrive, new divisions will emerge – for example, between those who favour a rapid rollback of restrictions and those who want them to continue until majorities have been vaccinated. And expect the protestations from anti-vaxxers to reach a crescendo once mass vaccination begins, attracting new adherents and detractors in the process.

What role will your brand play in conflict resolution – and post-pandemic rebuilding – in 2021?

Remember, the future is fluid.

While we all naturally hope for the best for 2021 – the widespread rollout of game-changing vaccines, a reanimated global economy, a chance to mourn, reconnect and breathe – uncertain times require us to anticipate multiple outcomes.

Rather than planning for a single defined future, we encourage clients to consider alternative scenarios when compiling their 2021 corporate strategy.

Throughout the report, we acknowledge how different scenarios could impact the direction and strength of each new trend. To strategise more nuanced scenarios for your brand or category, we'd love to talk.



Meabh Quoirin & Christophe Jouan
CEOs & Co-Owners, Foresight Factory





Explore the changes shaping consumer mindsets and expectations in 2021.

Anticipate their impact and prepare for multiple outcomes.

Here's a summary of the trends that feature in our full report, before we deep dive into four of them in this Preview.

5 new trends

Fantastical Fun

Consumers seek creativity, community and escapist liberation in fantastical worlds.

Retrospective Resolution

Consumers expect brands to apply today's values and principles retrospectively, and to right past wrongs.

Planning Prowess

Planning is a key route to control – and a source of optimism – in uncertain times.

Power of Now

Livestreaming is a growing channel for engagement, community-building and real-time feedback.

Social Wellness

Consumers prioritise positive relationships as the link between social connection and wellbeing becomes clear.

10 energised trends

Presence-Free Living

The need to be physically present to work, shop and communicate is being challenged by digital and cultural change.

Healthy Habitats

Consumers feel the need for the spaces they inhabit to boost mental and physical wellbeing.

Local Allure

Heritage, pride and sustainability drive consumers to buy local.

Acclimatise Now

The growing need to adapt to new realities brought about by a changing climate.

Latchkey Loyalty

Consumers are seeking more freedom and flexibility in choosing which brands to commit to – if they commit at all.

Building Resilience

The increased need for personal resilience and preparedness in the face of an uncertain future.

War on Waste

Consumers reject wasteful consumption, and brands are invited to find solutions for waste-free living.

Maximising Behaviour

Price and brand loyalty fall under intense pressure as tech-savvy, bargain-hunting consumers seek the best deal at every touchpoint.

The Stakeholder Consumer

Consumers need to be treated like an active stakeholder by brands, empowered to direct and decide.

Synthetic Society

The desire for shame-free imitations of everyday products and services.

To dig deeper into these trends, and what they mean for your brand, please email Kerry Rheinstein at kerryr@foresightfactory.co



New trend Social Wellness

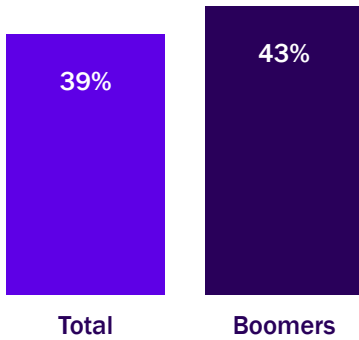
Consumers prioritise positive relationships as the link between social connection and wellbeing becomes clear

What to expect in 2021

- **Conversation about social wellbeing will grow.** Consumers increasingly recognise the valuable role that social connections and interactions play in overall health. Many studies over the past few decades find that regular social contact increases life expectancy by 50% (source: “Social Relationships and Mortality Risk: A Meta-analytic Review”, *PLoS Med*, 2010), and that lack of social contact weakens anti-viral response (source: “Social regulation of gene expression in human leukocytes”, *Genome Biology*, 2007). Friends, partners, family members, colleagues, neighbours – the company we keep is as important to physical and mental health as the careers we choose, the places we inhabit, and the health and nutrition regimens we follow.
- **The pandemic has been isolating for many, bringing this topic to the fore.** In August 2020, 45% of 13-40s reported feeling more distant from friends because they could not spend time together in person during the pandemic (source: **Snap Inc**). While COVID-19 has reminded consumers of the value of their relationships, it has also made them more wary of these connections – especially as they become more attuned to the potential health threats others may pose.
- **Consumers will evaluate the people in their networks according to the impact they have on their mental wellbeing.** In an era of consumer empowerment, the search for personal happiness demands a more calculated approach to relationship-building. Consumers hold parallel needs: to invest in ways to rekindle and strengthen social bonds, and to prune toxic contacts. They may first seek to reconcile differences and renegotiate boundaries rather than end relationships completely. Cutting off contact is usually the last resort, but those who make us feel stressed, sad or inadequate may need to be rooted out entirely. But for some, such relationship management will represent snowflakeism: the inability to tolerate those with differing worldviews and challenging perspectives.
- **Brands will be in a position to help consumers reconnect.** 2021 will see consumers looking to reunite and repair social ties as pandemic separation recedes. This presents brands with an opportunity to lead on messaging and action designed to not only keep social connections alive, but also highlight empathy and togetherness. Experiences can be geared towards social wellbeing – whether that be relationship-building virtual escape rooms or hygienic in-person setups that enable consumers to sate *skin hunger* (the powerful desire for regular physical contact with another person). At its core, **Social Wellness** is about living a fuller life; brands can only benefit by helping consumers achieve this.



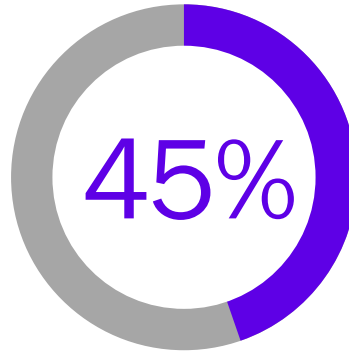
Consumers are social beings



% who agree “I am **sociable** and enjoy being around people”¹

¹ Source: Foresight Factory | Global, 2020 May

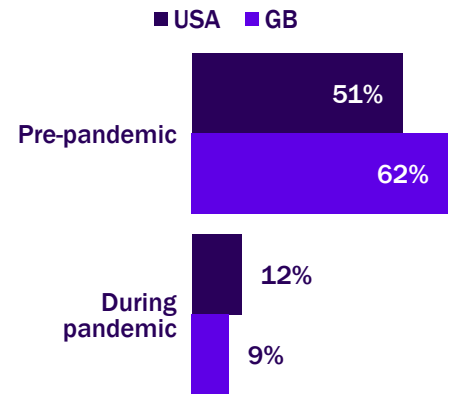
Physical presence is important for social connection



% of 13-40s **felt more distant from friends** because they couldn't spend time in person during the pandemic²

² Source: Snap Inc. | Worldwide, 2020 July-August

Real-world interaction is not worth the risk



% who say **in-person** is their most preferred method of connecting with friends and family³

³ Source: Foresight Factory | GB/USA, 2020 June

2021 scenarios and post-pandemic outlook

1. Light at the end of the tunnel: vaccines arrive in H1 2021, enabling economic growth and confidence to return

A vaccine would allow consumers to reconnect with others outside of their inner circles, but expect barriers to linger, alongside widespread post-pandemic resolutions to reunite and repair social ties.

2. Prolonged pandemic: vaccines and suppression tools are delayed or ineffective, downturn persists in 2021

A prolonged pandemic would reinforce social walls and increase feelings of isolation and loneliness. Distancing practices and social pods would become entrenched. There would be ongoing reluctance to mix with people with different attitudes to the virus.

3. What will the Social Wellness trend look like post-pandemic?

Regardless of economic or epidemiological developments, definitions of wellbeing will become ever more holistic. **Social Wellness** will become embedded in the overall picture of healthy living, and consumers will proactively build and maintain positive relationships.



As I get older, I cut more and more “toxic” people out of my social circles. I think in my early 20s it was important for me to surround myself with more and more people simply to grow my social network. But now that I’m less insecure, I’m more certain of who I want to surround myself with and why I want to keep certain people closer to me than others.

**Male, 32,
Shanghai, China**

To discover how your brand can play a role in creating positive interactions among consumers, please email Kerry Rheinstein at kerryr@foresightfactory.co



Social Wellness

What does this mean for you?

Marcoms

Promote safer interactions and new COVID etiquette between people. This will help remove potential barriers to positive interactions and relationships, and enable disagreeing parties to get on board with one standard.

Customer Engagement

Offer rewards that bolster social connections. Tailor perks for your customers' social circle, such as by offering group discounts and experience packages that enable them to spend more quality time with friends.

Retail

Help consumers to solidify their relationships through gifting. Use personal data to offer advice on the best gifts for individuals in consumers' networks, whether they be good friends, partners or family members.

To unlock more actions for the sectors and business areas below, please email Kerry Rheinstein at kerryr@foresightfactory.co

Branding and Positioning

Leisure

Social Media

Work and Skills

Travel and Hospitality

Health and Wellbeing



New trend

Retrospective Resolution

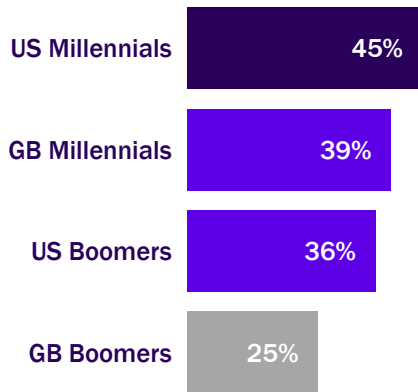
Consumers expect brands to apply today's values and principles retrospectively, and to right past wrongs

What to expect in 2021

- **Addressing past misdeeds.** In this era of conscious consumerism, brands have a moral imperative to do what is right – but corporate social responsibility no longer only applies to the here and now. Increasingly, consumers are demanding that brands translate their values and principles *retrospectively*, and rectify any past wrongs – be they a historical lack of diversity, unpalatable connections with slavery, or an outsized carbon legacy. This has spawned a culture of forensic investigation, with consumers delving deep into brands' past records to search for – and call out – any evidence of wrongdoing.
- **The need for retrospective resolution – and reparation.** Under this heightened scrutiny, expect more brands to come clean about their dark and dirty histories. And no longer will a simple apology suffice – instead, brands will also be obliged to make reparations accordingly. Brands like **Google** and **Microsoft** have detailed the steps they are taking to nullify their carbon legacy. And in June 2020, UK brands **Lloyd's of London** and **Greene King** announced that they will compensate minority groups to make amends for their founders' roles in the trans-Atlantic slave trade.
- **The penalties for inaction can be severe.** For instance, consumers have no qualms boycotting brands that offend their beliefs. Also, present-day campaigns or promises for the future can dramatically backfire if they are at odds with your brand's past doings. In June 2020, **L'Oréal's** "speaking out is worth it" campaign launched in support of **Black Lives Matter** received huge backlash, with consumers pointing out that the brand has previously terminated its contract with black trans model **Munroe Bergdorf** specifically for speaking out about racism. However, it is also crucial that brands tread carefully when atoning for past wrongs. When syrup brand **Aunt Jemima** announced a rebrand after acknowledging that its image is rooted in a racial stereotype, some consumers felt that the move was akin to an erasure of history.
- **A year of reflection.** Are there any historical transgressions that your brand or sector needs to address? 2021 will also see many consumers reflecting on their own personal legacies. How can your brand help consumers make up for their past shortcomings?



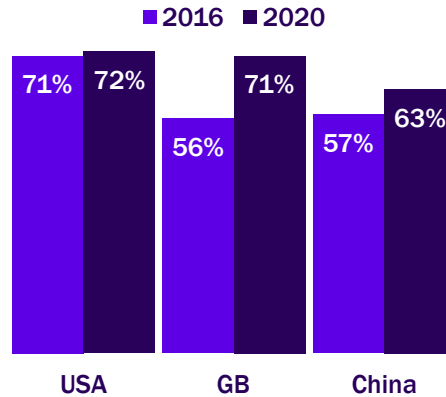
Consumers increasingly select brands based on values



% who agree they have **boycotted a brand** because it **offended their beliefs or culture**¹

1 Source: Foresight Factory | GB/USA, 2019 May

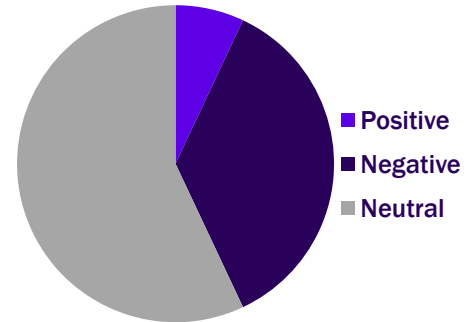
Consumers want to check products' ethical credentials



% who would be interested in using a **service to check how ethical a product is before buying it**²

2 Source: Foresight Factory | Global, 2020 May

Brands should tread carefully when atoning for past mistakes



Social media sentiment surrounding **Aunt Jemima's rebrand** in June 2020 was largely negative or neutral³

3 Source: Foresight Factory/Brandwatch | Global, 2020 June

2021 scenarios and post-pandemic outlook

1. Light at the end of the tunnel: vaccines arrive in H1 2021, enabling economic growth and confidence to return

This trend would flourish under more positive economic conditions, as brands would have the capacity – financial and otherwise – to expand corporate social responsibility efforts and examine their legacies.

2. Prolonged pandemic: vaccines and suppression tools are delayed or ineffective; downturn persists in 2021

Under more uncertain economic conditions, brands would channel their efforts towards pandemic survival and focus on offering value above all else. Many would not have the bandwidth to rectify past transgressions; instead, they would be forced to focus on the here and now.

3. What will the Retrospective Resolution look like post-pandemic?

Retrospective Resolution will become a key consumer expectation. Brands seeking to build back better from COVID-19 will look to correct previous misdeeds and start the post-pandemic era with a clean slate. New transgressions will come under the spotlight – from factories with poor labour conditions to brands that push relentless consumerism.



I think [brands righting past wrongs] is important to people. In the US, **Georgetown University** as well as a growing group of other colleges are paying reparations for the slaves they used to own, and they have generally been lauded for this approach.

**Male, 30,
New York, USA**

Does your brand need to make up for past shortcomings? Let us help you dig deeper and find out. Email Kerry Rheinstein at kerryr@foresightfactory.co



Retrospective Resolution

What does this mean for you?

Branding and Positioning

Own your brand's past transgressions – and offer a positive vision for the future.

Consumers will appreciate an honest appraisal of your brand's past record of social and environmental issues – even if the findings that are unearthed are less than savoury.

Work and Skills

Address historical workplace inequalities. For instance, racism has long been embedded in many workplaces – an issue that has come to the fore thanks to the **Black Lives Matter** movement. Some companies, such as **adidas** and **Glossier**, have taken steps to address this,

Consumer Tech

Address your carbon legacy. From energy-intensive data centres to the problem of e-waste, the tech industry has a massive carbon footprint.

To unlock more actions for the sectors and business areas below, please email Kerry Rheinstein at kerryr@foresightfactory.co

Marcoms

Customer Experience

Customer Engagement

Food and Beverage

Alcohol

Retail

Health and Wellbeing

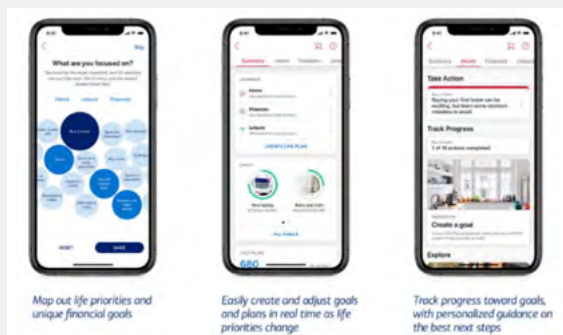


Energised trend

Building Resilience

What to expect in 2021?

In a volatile world where “unprecedented” events come thick and fast, many accept that it pays to prep. Threats include the continuing pandemic, related economic shocks, political uncertainty and extreme weather. Consumers will seek to improve their immune systems, build mental resilience, increase precautionary saving, stock up on household essentials, and upskill to boost their employability – and many will welcome related brand assistance.



Life Plan goals

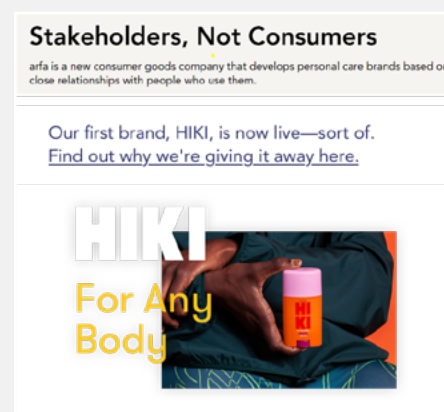
In October 2020, **Bank of America** launched **Life Plan**, a new tool to help customers set and track life goals. Customers can select and prioritise their most important goals at every lifestage and across multiple areas, including finances, family, health, home, work and leisure. Goals can be continuously adjusted as priorities change, and professional advisors are on hand to help.

Energised trend

The Stakeholder Customer

What to expect in 2021?

During the pandemic, brands turned to customers with engagement and community-building activity to seek input and approval for pandemic pivots, and to create a sense of shared ownership over their evolving response. Customers will continue to be regarded as stakeholders in 2021, with collab centres, customer board meetings and *feedforward* sessions driving the trend.



Arfa seeks customer input

Arfa is a US personal care brand that keeps this trend at the heart of its business with the tagline “stakeholders, not consumers”. Its philosophy is to involve customers directly in the creation, testing and marketing of its products. 5% of profits will be directed to customers who get involved with the brand – its “co-pilots”, who form a group called **The Collective**.

From increased eco-awareness to category-switching behaviour and a renewed focus on local community, which energised trends will impact your business in 2021? To find out more, please email Kerry Rheinsteint at kerryr@foresightfactory.co

What's next for your brand in 2021?

What's next for your brand in 2021?

You might be wondering how to steer your business through uncertainty. Or perhaps you're asking which behaviours are here to stay, where opportunities lie, or how to create a roadmap for long-term growth.

We know. And we're here with the answers you need.

Helping you understand what key consumer trends mean for you

Everyone else looks at what's going on – we make trends actionable across your business, so you know what to do – and when. And we'll help you plan multiple scenarios that are as fluid as the future you're facing.

Providing different, better business answers

Whether you need to build your strategic foresight skills, future-proof your corporate strategy, or optimise your targeting and investment, we're here to help.

Our dynamic intelligence platform, Collision, is where trends collide with data – and inspiration with application – to create a seismic business impact. With our live, customised trend intelligence, reports, data and analysis, you'll never miss a signal.

And work with our experts to apply a future lens to a critical business theme, build or refresh your trend framework to prepare for every eventuality or present recommendations to your C-suite that anticipate and meet COVID-driven consumer shifts.

If you would like to uncover all of the trends in the full report, please do get in touch. We'd be happy to arrange a session with you and your leadership team to explore how its insights can be actioned for your business.

Just email Kerry Rheinstein at kerryr@foresightfactory.com and we'll come right back to you.
