dentsu

EXECUTIVE SUMMARY

The Age of Inclusive Intelligence

Executive Summary

As the world adapts to life in the new normal, it's time to go back to the future.

Before the COVID-19 pandemic crisis brought the world to a standstill and before the Black Lives Matter movement swept across the United States in 2020, we began charting the long-term consumer trends that would shape the next decade out to 2030. Little did we know that this analysis would be challenged so quickly.

Now, as brands assess the impact of a seismic year and look to chart a new path to recovery, these trends provide them with a roadmap for the next decade. Many of these trends have been accelerated by the events of 2020—some have been irreparably altered and revised. But they are offered up as an attempt to grapple with some of the long-term influences that brands must understand and master. In a discipline often obsessed with short-term results and next-quarter thinking, our inaugural consumer vision provides a new perspective on the drivers of long-term, sustainable brand growth.

The research is based on in-depth interviews with a panel of 20 world-renowned futurists, academics, authors and experts; multiple proprietary consumer surveys from more than 20 countries; a comprehensive technological patent and innovation scan of the next decade; and extensive secondary research and case study analysis. It is essential reading for anyone who hopes to understand consumer behaviour and the implications for brands through to 2030.

Of course, it would be hubristic in the extreme to assert that all our forecasts and predictions will materialise. However, directionally we believe these are the key forces that will shape our future. Inevitably, they will evolve—and potentially be disrupted themselves.

In this spirit, we've identified four over-arching themes that will shape the next ten years in terms of consumer behaviour and brand response. Each is underpinned by three key trends—not by design, but by a thorough, bottom-up identification, assessment and prioritisation of the key trends impacting brands. For more on our methodology, please see page 23.

We've also proposed a variety of recommendations for brands across each trend. Together, these can help brands develop what we call 'inclusive intelligence'—the ability to incorporate new views, values and behaviours into their value proposition against a backdrop of widening inequality, societal dislocation and ethical complexity. We believe this will be the critical quality for brands to develop if they are going to navigate successfully the forces shaping their future.

So here they are. The 2030 consumer trends your brand must master today:

Universal Activism

Trend 1: Acclimatise now
Trend 2: A new data paradigm
Trend 3: Kaleido-dentity

Synthetic Society

Trend 1: Beyond human
Trend 2: Virtual sets the standard
Trend 3: Tech togetherness

Bigger Bolder Brands

Trend 1: Rise of the Titan brands
Trend 2: Every brand is a health brand
Trend 3: 5-star citizens

The Human Dividend

Trend 1: What robots can't do
Trend 2: Objective-free play
Trend 3: Emotion trumps objectivity

Universal Activism

In the 2010s, brands were rightly obsessed about meeting consumer needs. But the term 'consumer' itself is too narrow a concept. In the 2020s, brands will need to reconceive of their customers as activists, driven in their decision-making by a new range of influences and causes, from climate change to data privacy and new definitions of identity.

TREND ONE

Acclimatise now

By 2030, the fight against climate change will be as much about adaptation as it is mitigation, with increasingly severe weather occurrences continuing to cause loss of life and habitat. A new, sustainable stock market is likely to emerge over the next decade, with the incorporation of sustainability into corporate metrics becoming mainstream. Regulation will play a key role in incentivising more sustainable lifestyles—over the 2020s, we may well see a red meat tax introduced in some EU countries. For brands, inaction on climate change will be considered by consumers as an act verging on criminal negligence. Seven in ten people believe that in 2030 brands will be penalised through fines or higher taxation if they fail to reduce their environmental impact.

At the same time, an uncomfortable truth remains that climate change will lead to some growth opportunities; for example, the expansion of the wine industry to new terroirs. How brands communicate the concrete action they are taking to combat climate change alongside realising some of its benefits will be a delicate balancing act.

> **My hunch is that we are going to see a new stock market in the next decade, which measures factors besides only economic growth and profit.**
>
> Gerd Leonhard, futurist and author

A new data paradigm

By 2030, more and more consumers will be deploying personal data assistants to manage their relationships with brands, creating a new power paradigm. With eight out of ten people globally saying they would like more control over the personal information they share with companies, new AI-enabled services will emerge to help them do this. Within this context, brands will now engage a customer's personal data assistant more than they communicate with the customer themselves—expect the emergence of a new award at Cannes Lions for the best brand engagement with a personal AI service.

Furthermore, we'll also see the emergence of 'privacy islands', consumers who are willing to forego convenience and access to digital services for the sake of control over their data, becoming almost invisible to brands. Today, a quarter of people globally are unwilling to share personal information under any circumstances, while half of consumers globally expect to be able to refuse to share their personal data, but still receive the same level of service. This will place a huge emphasis on brands finding new 'offline' strategies to reach under-the-radar communities. To help govern the ethical implications of this new data economy, we can expect to see the emergence of a new global digital ethics council to ensure brands use their power responsibly.
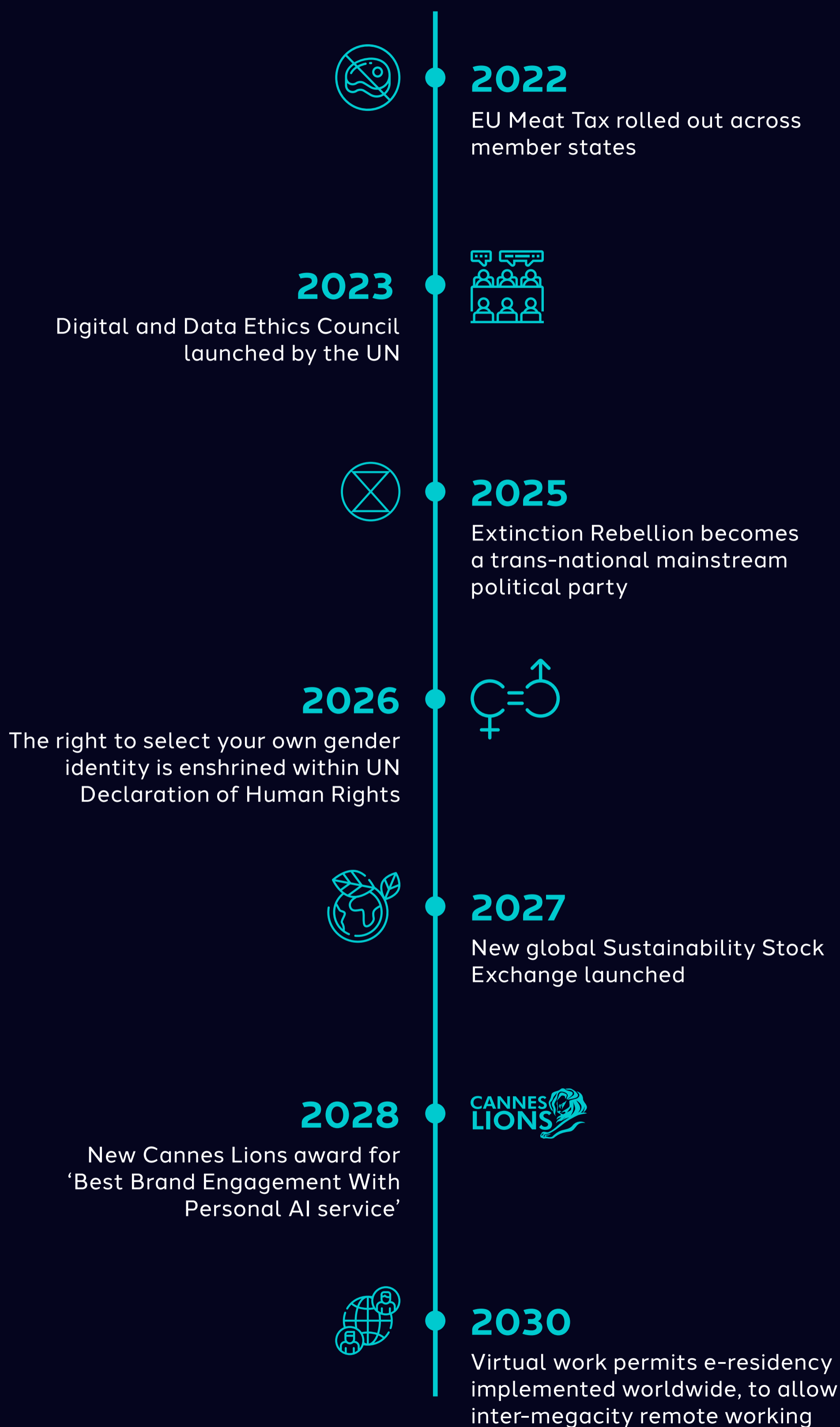
Kaleido-dentity

By 2030 the concept of identity will have evolved even further, beyond sex and gender to incorporate a range of values including attitudes to sustainability, granular minority rights and urban dwelling, for example. These will give consumers new sources of belonging and identity that brands will need to navigate carefully. Already today around one-third (29%) of consumers globally agree they are troubled that ads do not reflect society in terms of race and gender. As concepts of identity evolve further, brands will need to self-educate and act continuously—for example, reflecting a broader spectrum of identities in creative executions and evolving targeting approaches beyond demographics to more nuanced combinations of contextual data.

At the same time, the pressure for conformity across social and professional interactions means we will likely see the use of AI to warn us when we are about to express a view that may risk a negative reaction. Expect 'wokeness' to rival aesthetic beauty in terms of social capital, the public reception to our ideas competing with how we look.

❝ **We will probably see the end of governments acting against the wishes of their principal cities in the coming decade... because young people move to cities.** ❞

Parag Khanna, global strategy advisor, author

Universal activism: Pathway to 2030

2022
EU Meat Tax rolled out across member states

2023
Digital and Data Ethics Council launched by the UN

2025
Extinction Rebellion becomes a trans-national mainstream political party

2026
The right to select your own gender identity is enshrined within UN Declaration of Human Rights

2027
New global Sustainability Stock Exchange launched

2028
New Cannes Lions award for 'Best Brand Engagement With Personal AI service'

2030
Virtual work permits e-residency implemented worldwide, to allow inter-megacity remote working

dentsu consumer vision | executive summary

Synthetic Society

In the 2010s consumers and brands alike placed a premium on natural, organic products and ways of living. In the 2020s, we'll see a widespread embrace of synthetic enhancements and virtual experiences that improve our health as well as the way we express emotion and experience pleasure.

TREND ONE

Beyond human

By 2030 we'll see the emergence of a new, privileged class of citizens who can afford technological upgrades (e.g. exoskeletons, genetic editing, smart drugs, brain-computer interfaces) to their physical and psychological states. Around a third (32%) of consumers would by 2030 consider undergoing non-essential surgery to improve their mental health. This will introduce a new health divide and potential source of increased inequality between those lucky few able to afford such enhancements and the rest of society. However, two-thirds of consumers globally expect organisations in the next five to ten years to use technology in a way that has wider societal impact, signalling that brands will need to prioritise the democratisation of human augmentation.

Furthermore, new ethical questions will be raised by these enhancements, requiring brands to update their strategies to an evolved notion of what it means to be human. Will brands have to develop a brain microchip targeting strategy? It may sound far-fetched, but these new interfaces are advancing rapidly.

> " In the future inequality will happen not because of money but because of gene editing, where we have super humans who will be able to afford to get the best traits and the others that don't. "
>
> Victoria Alonsoperez, engineer and entrepreuner

Virtual sets the standard

By 2030, eSports and immersive gaming will have changed the way we look at 'real-world' sports and activities, forcing the latter to innovate to keep up. Global awareness of eSports is expected to reach two billion by 2021, while a 'never before' event by 2030 could be the FIFA eWorld Cup becoming the most watched sporting event on the planet.

In addition, the next generation of augmented technology will elevate day-to-day experiences, overlaying audio and visual content across many aspects of a consumer's day in 2030 and opening up a new range of immersive experiences. For example, expect the haptic suit to become the new joystick, allowing consumers to feel physical sensations corresponding with their virtual experience.

AR glasses will also have evolved to a state where augmented content can be displayed continually, creating unique personal realities that separate how consumers view and engage with daily life. For brands, the implications are manifold. New arenas of potential sponsorship and partnerships will emerge as eSports become mainstream, while new domains of augmented experience will provide further opportunities for entertainment and engagement. On the downside, virtual addiction will become more commonplace, requiring brands to be more mindful of how their consumers engage with more immersive experiences in a responsible way.

" We are only just seeing the start of VR. You can go into full immersive wearing a haptic suit and inside the gyro rings you can tilt, go uphill, lie flat on your back, all in the system. "

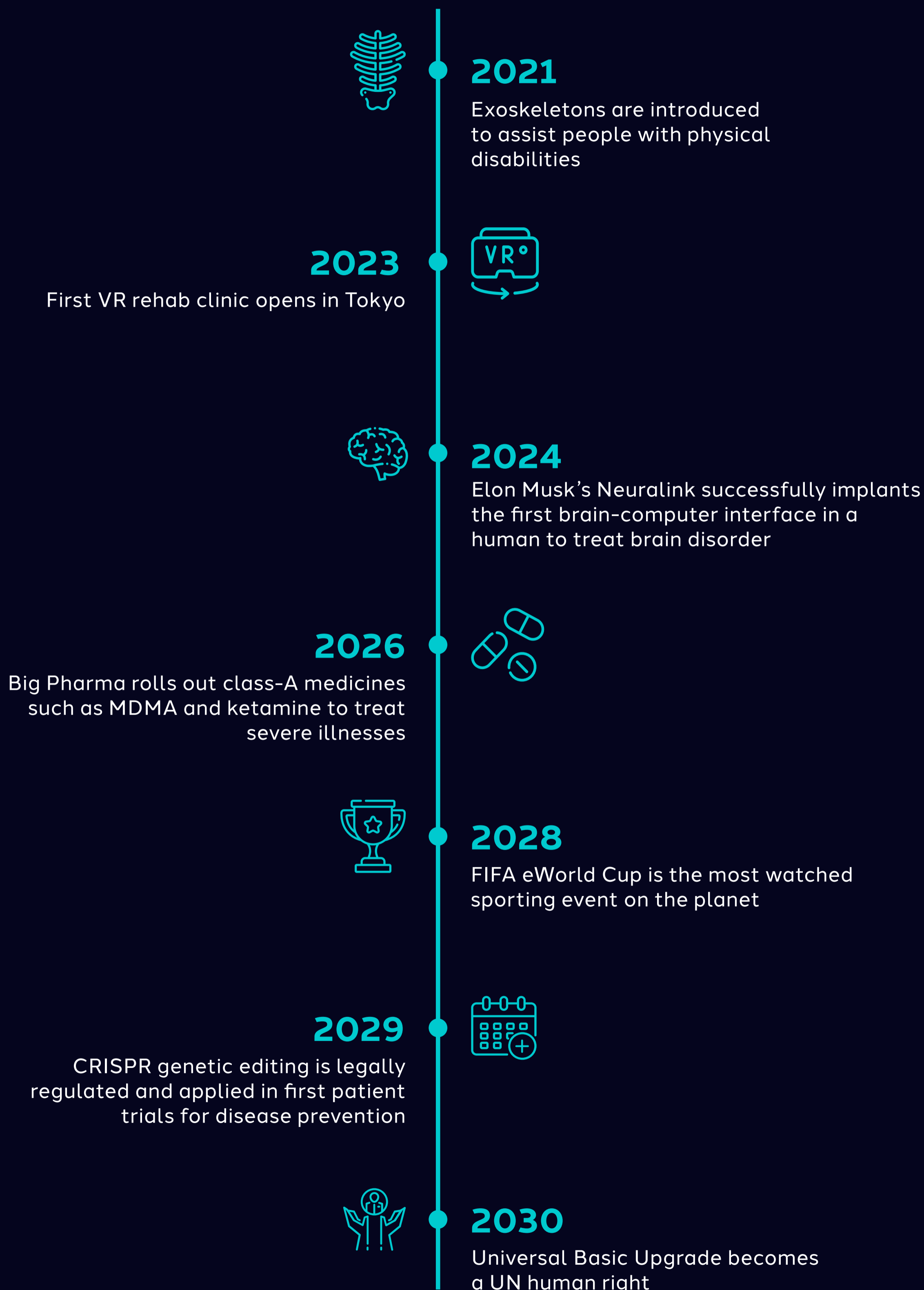Peter Hamilton, science fiction author

Tech togetherness

In the next decade, technology will be leveraged in increasingly innovative ways to foster human connection, forging togetherness despite distance or solitude, and democratising friendships and intimacy. The COVID-19 crisis has accelerated developments in this area, particularly among vulnerable groups who have experienced loneliness more acutely.

Already today, one-third (32%) of consumers would consider allowing AI to care for an elderly relative unsupervised. In 2030, robot companions will become more commonplace as a way of helping the elderly and disabled, providing in-home care more effectively. Furthermore, the heightened appetite to experience closeness to others will be met by continued innovation in the sex industry that is likely to move more into the mainstream in the 2020s.

For brands, technology's potential to enable new emotions and sensations will provide new ways of communicating with and engaging potential customers, through senses beyond sight and sound. Expect marketers in the future to increase their appeal and strengthen their identity through their sentient branding.

Synthetic society: Pathway to 2030

2021
Exoskeletons are introduced to assist people with physical disabilities

2023
First VR rehab clinic opens in Tokyo

2024
Elon Musk's Neuralink successfully implants the first brain-computer interface in a human to treat brain disorder

2026
Big Pharma rolls out class-A medicines such as MDMA and ketamine to treat severe illnesses

2028
FIFA eWorld Cup is the most watched sporting event on the planet

2029
CRISPR genetic editing is legally regulated and applied in first patient trials for disease prevention

2030
Universal Basic Upgrade becomes a UN human right

Bigger Bolder Brands

Over the course of the 2010s consumers became progressively more empowered, given more choice and ability to dictate the terms of their engagement with brands. In the 2020s, the focus will shift to how brands can help service consumers more effectively across all aspects of their lifestyle. At the same time, data will enable brands to be more selective in the consumers they choose to engage with, focusing on those segments that will in time be most lucrative.

TREND ONE
Rise of the Titan brands

By 2030 we can expect to see consumers selecting specific brands to be their main lifestyle partners, becoming an integral part of their commercial activity and everyday lifestyle. In China, 4 in 10 consumers would by 2030 consider using a single company for all their lifestyle needs, such as shopping, financial services and healthcare. The possibility of consumers choosing select brands to be their main partners by 2030 has the potential to transform our current perception of customer loyalty and brand choice. Super-functionality will be a primary driver of brand loyalty, with customers assessing the holistic benefit to their desired lifestyle. However, this mass migration to a few select platforms will also challenge brand identity as consumers increasingly search for categories rather than specific brand names, letting the platform select which products they see.

Competing with these 'Titan' brands will also be made harder by their access to huge amounts of customer data, placing the onus on other brands to form effective partnerships and alliances— or to develop a direct-to-consumer relationship that secures access to first-party data. Regulators will likely look to curb Titan brands' market dominance, experimenting with more anticipatory approaches to legislation, but ultimately will struggle to keep pace with their rapid innovation and growth.

> **" Regulation historically tends to be very backward looking and regulation of tech companies has tended to solve things that were a problem ten years ago. "**
>
> Benedict Evans, mobile, media and technology analyst

Every brand is a health brand

By 2030, securing long-term health and well-being will be an increasingly central goal in purchase decision-making for many consumers. 'Sin substitutes' such as the emerging range of alcosynths (non-alcoholic drinks that mimic not only the taste, but also the effects of drinking alcohol) will help reorient diets around health enhancement, while the increasing use of predictive tools will help consumers gain insight into future health risks to pre-empt future care needs.

Nearly half of people globally believe that over the next five to ten years they will use technology to predict what will happen to their physical health. Building on this trend, GPs will offer DNA analysis to assess future risk of chronic disease and help patients adjust lifestyles accordingly. In 2030, every brand will have become a health brand and all companies will be expected to help consumers enhance their well-being through the brand's products and services. Within this context, the home will become an increasingly important domain for the practice of self-care, with the detection and forewarning of pathogens being a feature of smart cities and homes in 2030.

> **By the end of the decade most of us will have had our DNA decoded so that it can be used in our medical treatment. This is going to make drugs and treatments much more powerful than they are today.**
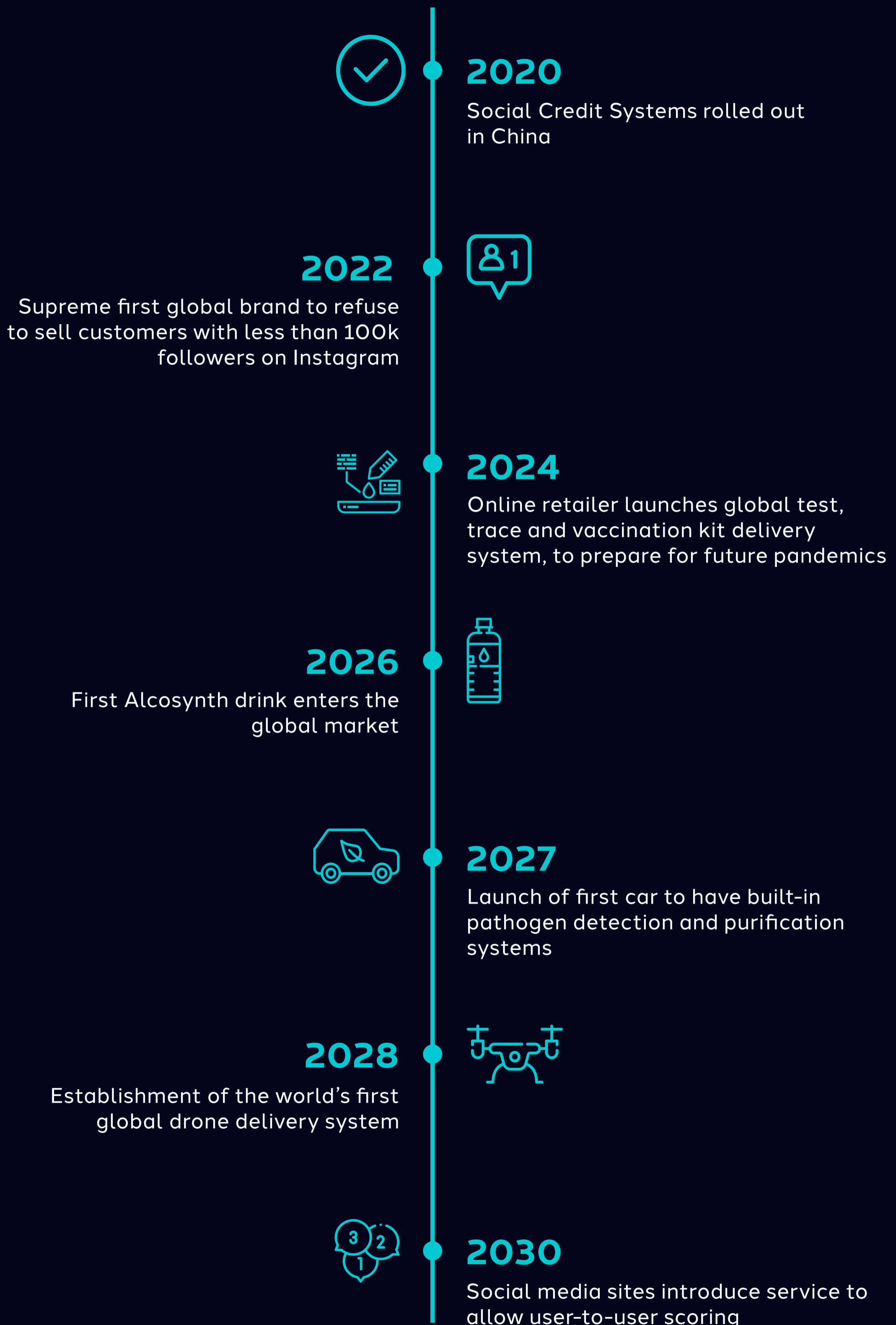
Ray Hammond, futurist and author

5-Star citizens

By 2030 it will be standard practice for brands and governments alike to rate their consumers/citizens across a whole range of factors, determining whether they can access exclusive or even public services. Already today, one-third of consumers globally believe it would be acceptable in future for governments to use their personal data to assess their trustworthiness.

For brands, examples would be hotels allowing only 5-star customers to stay or those in the luxury space only selling to consumers with a high influencer score. Such change will also open the possibility of a Black Mirror-like future where new social platforms allow consumers to rank each other, suggesting a plausible world in which each person has a score across work, personal and public service contexts.

For brands, navigating the reputation economy will be rife with risk, requiring them to carefully navigate the acceptable boundaries of exclusivity as well as develop a new model of what a 'good' customer looks like.

Bigger bolder brands: Pathway to 2030

2020
Social Credit Systems rolled out in China

2022
Supreme first global brand to refuse to sell customers with less than 100k followers on Instagram

2024
Online retailer launches global test, trace and vaccination kit delivery system, to prepare for future pandemics

2026
First Alcosynth drink enters the global market

2027
Launch of first car to have built-in pathogen detection and purification systems

2028
Establishment of the world's first global drone delivery system

2030
Social media sites introduce service to allow user-to-user scoring

The Human Dividend

In the 2010s, we were focused on digitising processes and business operations, with a commensurate focus on digital skills and education. In the 2020s, attention will shift towards those traits and capabilities that make us human, leading to a renewed celebration of what makes us unique—as well as understanding its limitations.

TREND ONE
What robots can't do

Faced with the threat of automation, by 2030 there will be an even greater premium on human skills such as creativity and compassion—and the brands that successfully embody those traits. Embedding and nurturing human skills and traits across a customer base and workforce will become a dominant brand attribute. Human vs. automated services will become a key factor in consumer choice and a never before event we could see emerge by 2030 is product labelling that clearly states whether something was produced by a robot or a human. Automated services will likely provide a sense of novelty in the early 2020s, but quickly become mainstream. Humanised service will be at the centre of premium brand propositions by 2030.

> " In this decade everything is emotion: every job is emotion, every role is emotion and all of the skills you needed to maintain a position in an organisation are also emotion. "

Mark Pesce, futurist and innovator

Objective-free play

By 2030, our focus on maximising our free time will further perpetuate the widespread use of technology. A never before event we anticipate is the launch in 2026 of the first AI-driven voice assistant that can provide hyper-personalised leisure suggestions to consumers.

However, at the same time, we can also expect a backlash against AI-driven product recommendations and optimised leisure time. Consumers will increasingly want more serendipity and surprise in how they spend their free time, providing a new opportunity for brands willing to curate seemingly spontaneous moments of discovery. The rise of immersive leisure experiences will drive renewed appeal for offline, human-led fun, such as traditional games, digital-detox holidays and nature escapes.

Expect the growing appeal of sustainable and social purpose led experiences, providing new opportunities for brands as curators of offline experiences.
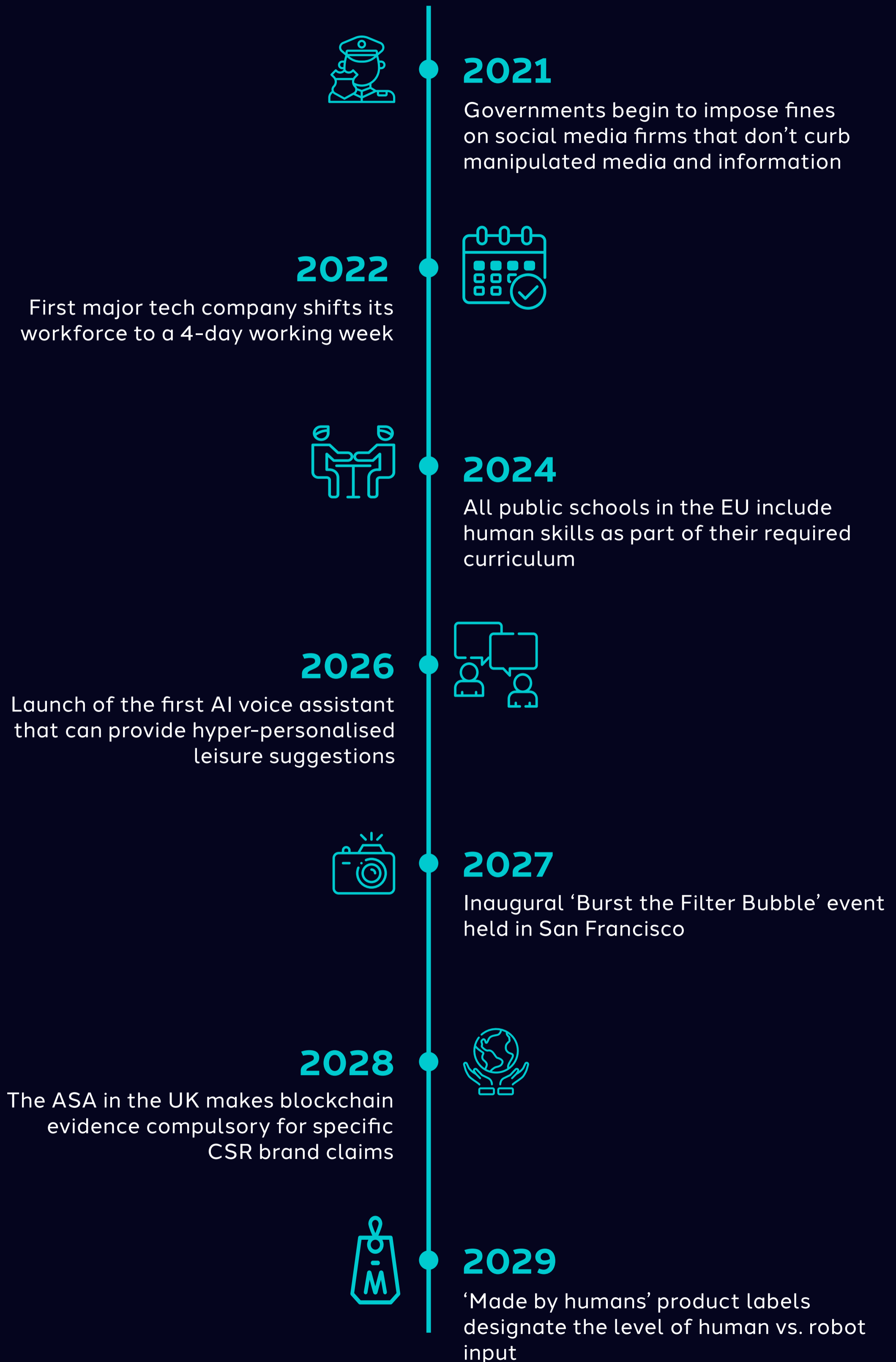
Emotion trumps objectivity

By 2030, appealing to emotion will become an even more powerful way of asserting truth than objectivity or rationale/critical thinking. Fuelled by social media, authenticity is being questioned as consumers curate their own online personas to show idealised versions of themselves and interact with the sponsored content of their peers. The development of AI-generated deepfakes will further blur the line between fact and fiction, making it hard for any consumer to identify the truth.

Faced with this complexity, many consumers will increasingly go with their gut and prioritise emotional responses in decision-making. This complex terrain will make it increasingly important for brands to focus on transparency to substantiate any claim they make about their products or services. A never before event in the next decade is media owners launching events to connect people with each other and new ideas to meet desires to burst their filter bubble.

> **Echo chambers and filter bubbles and confirmation bias... that very much is in the DNA of what digital technologies want to do and it will get worse.**

Rachel Botsman, trust expert and author

The human dividend: Pathway to 2030

2021
Governments begin to impose fines on social media firms that don't curb manipulated media and information

2022
First major tech company shifts its workforce to a 4-day working week

2024
All public schools in the EU include human skills as part of their required curriculum

2026
Launch of the first AI voice assistant that can provide hyper-personalised leisure suggestions

2027
Inaugural 'Burst the Filter Bubble' event held in San Francisco

2028
The ASA in the UK makes blockchain evidence compulsory for specific CSR brand claims

2029
'Made by humans' product labels designate the level of human vs. robot input

Building inclusive intelligence

Each of these trends carries specific implications for brands. But across almost all of them sits the concept of 'inclusive intelligence'— the ability to incorporate new views, values and behaviours into their value proposition against a backdrop of widening inequality, societal dislocation and ethical complexity. This concept will be a key battleground for brands to understand and master over the next decade. It brings with it different dimensions, requiring brands to determine how best they close the following gaps (among others):

- **Identity**
  Adapting to new values and sources of identity and ensuring these are incorporated into all aspects of consumer relationship management. With consumers increasingly motivated by a widening array of values, beliefs and sources of identity, traditional ways of analysing and segmenting people will require a radical shake-up. How will brands decide which values they will mirror back to their consumers and how best to update their tools of engagement to better align with new sources of identity?

- **Inequality**
  Addressing potentially widening disparities in access to products and services e.g. through more flexible pricing structures and better design. As many of our trends demonstrate, progress in new product development and innovation may also have the unintended consequence of widening the gap between those who can afford access and those who cannot. What role will brands play in addressing the inequalities that their services may inadvertently create?

- **Influence**
  Balancing consumers' desire for control (e.g. as it relates to their data) with the vast analytical power at brands' disposal. Increasingly brands will use technology and data to provide proactively new sources of insight and utility to consumers, empowering them to make better decisions across many aspects of their everyday lives. But how will brands decide where the line should be drawn between enablement and encroachment?
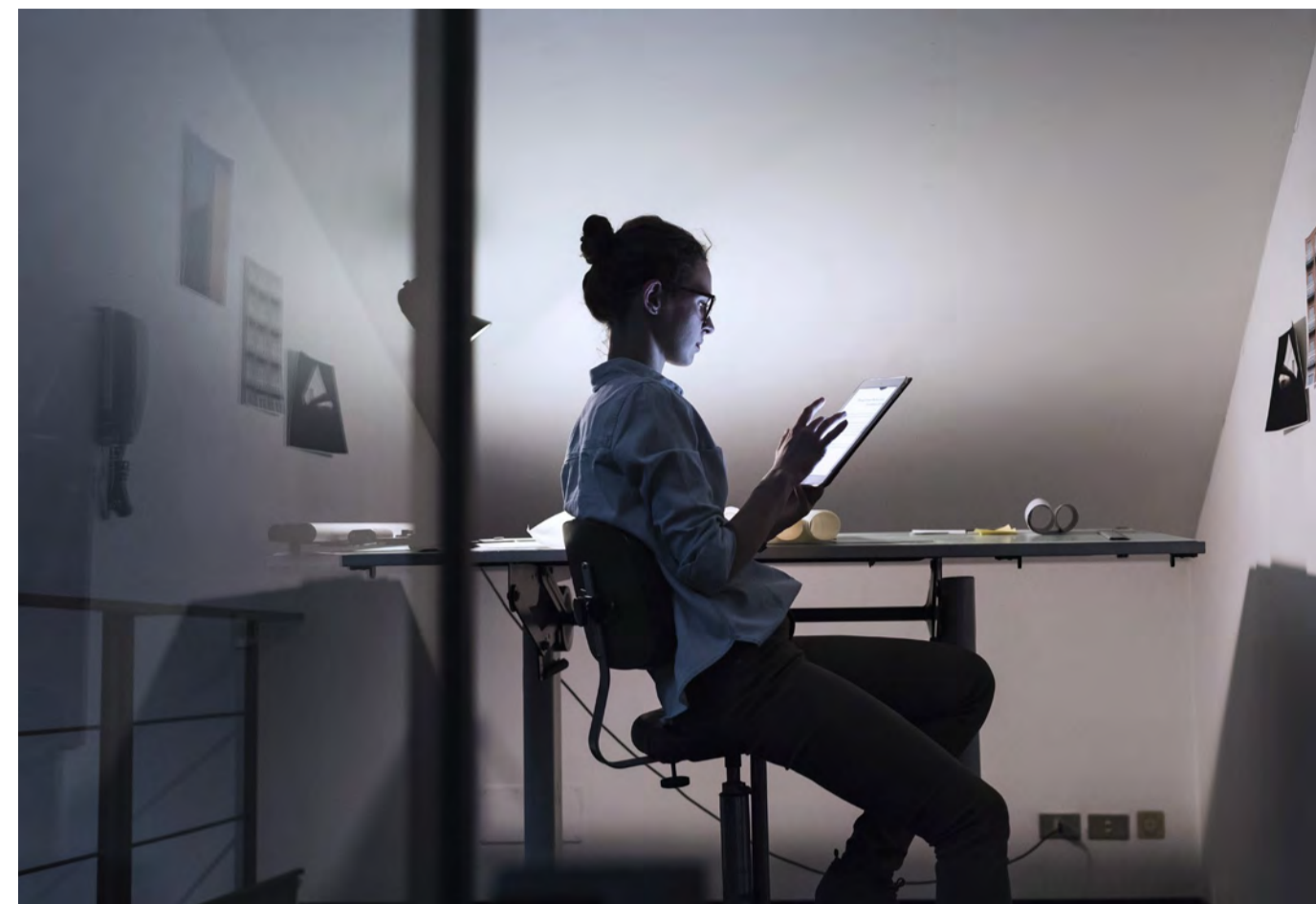
- **Integrity**
  Putting ethics at the heart of decision-making, governing issues such as technological development, public support for social issues and more broadly how to ensure that growth can be delivered within the environmental constraints of the planet. How will brands integrate ethical principles of good growth into the fabric of their business operations?

- **Integration**
  Acting as a source of unity, shared values and social integration against a backdrop of ongoing political and cultural polarisation. Brands have the wonderful ability to unite and help people find common cause. But which cause? And how can brands make themselves relevant to a plurality of consumers as views and political positions become more entrenched?

Addressing these questions—and more besides—will be critical if brands are to navigate successfully the uneven contours of the next decade.

Making meaningful progress

Making meaningful progress at this moment in history may seem a tall order for many brands. In the foreground, a tumultuous global economy disrupted by recession, health crises and social upheaval. And in the distance, long-term trends that are already beginning to reshape what brand success will mean in the future, requiring careful recalibration around emerging dynamics.

Within this context, building inclusive intelligence starts with superior consumer understanding. Of course, almost all brands profess to put the consumer at the heart of everything they do. But too often this is challenged by clunky internal architecture and legacy assets. Furthermore, brands often find themselves playing catch up as they try to adapt at the speed of consumers, rather than looking ahead and pre-empting discernible changes in consumer behaviour. Back-casting, horizon scanning and scenario planning can all help brands imagine who their customer in 2030 will be—assessing what that consumer would think of their business as it exists today and beginning the work required to meet these future expectations throughout the coming decade.

Furthermore, as brands are drawn into new fields of activity and debate, they will need to become as comfortable collaborating outside of their organisations as they are within them. Suppliers, partners, clients, NGOs, governments, communities will all need to be engaged more radically to develop an acute sense of inclusive intelligence, helping to avoid a potential widening of existing inequalities in the societies that brands operate within and to ensure progress for the whole of society.

In many ways, the story of the next decade is one of progress and peril. Securing the future and building lasting relationships with consumers requires a new kind of thinking within a new kind of brand. The journey starts now.

Methodology

The dentsu consumer vision has been developed with the support of Foresight Factory, a leading consumer trends agency. Our analysis draws on different sources:

- **Expert interviews:** We convened a panel of some of the world's foremost futurists, academics, authors and experts to help identify our trends (see below). They provided a rich, diverse set of perspectives and we are extremely grateful for their commitment to this project.

- **Primary consumer surveys:** We have utilised proprietary consumer surveys from both Foresight Factory and dentsu, covering 20+ countries and more than 30,000 people. These surveys were conducted online over the course of 2020.

- **Innovation and patent scan:** A thorough review of upcoming and possible industry, technological and scientific advances over the coming decade.

- **SME workshops:** Interactive workshops were conducted with dentsu experts across creative, media and CXM as well as both client and functional leaders.

- **Secondary research:** Extensive desk-based research was undertaken to develop a long list of potential trends that were then prioritised and down-selected.

Our expert panel

Ian Pearson
Futurist and author

Ray Hammond
Futurist and author

Gerd Leonhart
Futurist and author

Jennifer Gidley
Author, futurist and researcher

Puruesh Chaudhary
Futurist

Parag Khanna
Global strategy advisor, author

Mark Pesce
Futurist and innovator

Nick Harkaway
Science fiction author

Peter Hamilton
Science fiction author

Dr Edmund Lee
Public health communication scientist

Mina Al-Oraibi
Editor in Chief, The National

Cath Tayleur
Biodiversity expert

Eliot Whittington
Climate change expert

Geci Karuri-Sebina
Author, Associate at South African Cities Network

Rachel Botsman
Trust expert and author

Benedict Evans
Mobile, media and technology analyst

Victoria Alonsoperez
Engineer and entrepreuner

Kate Adams
Director of Operations and Special Projects at Nesta

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About dentsu international

Part of dentsu, dentsu international is made up of eight leadership brands - Carat, dentsu X, iProspect, Isobar, dentsumcgarrybowen, Merkle, MKTG, Posterscope and supported by its specialist brands.

Dentsu International helps clients to win, keep and grow their best customers and achieve meaningful progress for their businesses.

With best-in-class services and solutions in media, CXM, and creative, dentsu international operates in over 145 markets worldwide with more than 46,000 dedicated specialists.

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