

Expert Outlook 2019

# Find Balance

CANVAS8



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In 'Break Reality' – last year's Canvas8 Expert Outlook – we zeroed in on the growing appetite for escapism. From the meditation pods of London's Browns East to the wanderlust-inducing Instagram Stories of *Condé Nast Traveler*, our experts predicted that 2018's most talked-about brands would be the ones that offered people moments of respite from the daily grind.

From the safety of their gravity blankets, people binged on *Bojack Horseman* and *Love Island*, and multi-step beauty routines were a salve for social stressors, with searches for 'self-care' peaking in September. But in this year's Expert Outlook, we're seeing a shift away from escaping reality and towards a desire to address it. Political pressures, the rise of automation, and climate change have people rethinking their individual agency. And after a year of diverse viewpoints coming to the fore, people are becoming more aware of the power their voices carry and want businesses to take responsibility for ensuring they are heard.

People are seeking equilibrium in all aspects of their lives – between humans and technology, brand and personal, and global and local. They expect shopping to be quick and convenient, but not at the expense of our planet's future. They're responding to Glossier's BFF marketing and Nike's social commitment, but want to see that brands also understand personal privacy and differing political views. And though wary of AI's potential to replace human interaction, they will appreciate how it can enhance face-to-face services, hyper-personalise their beauty routines, or help break the everyday grind.

As you discover 2019's key themes, we invite you to immerse yourself in the Canvas8 Library, exploring our experts' insights in more detail. Happy reading.

– Jo, *Editorial Director*

## EXPLORE THE LIBRARY

The Canvas8 Library is an unrivalled resource of 23,000+ articles on global consumer behaviour. It is available exclusively to members at [www.canvas8.com](http://www.canvas8.com).

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# Canvas8 expert panel

## Beauty



**Dr. Barbara Brockway**  
Director of personal care at Applied DNA Sciences



**Jillian Wright**  
Co-founder of Indie Beauty Media Group



**Bunny Kinney**  
Editor-in-chief of Dazed Beauty

## Careers



**Adam Smiley Poswolsky**  
Workplace expert and keynote speaker



**Maddie Grant**  
Culture consultant at Human Workplaces



**Oliver Sidwell**  
Co-founder of RateMyPlacement

## Citizenship



**Tomas Diez**  
Co-founder of Smart Citizen



**Renée DiResta**  
Director of research at New Knowledge



**Michael Pawlyn**  
Director of Exploration Architecture

## Communications



**Dr. Pamela Rutledge**  
Director of the Media Psychology Research Center



**Nancy Baym**  
Principal researcher at Microsoft Research



**Simon Wadsworth**  
Managing partner of Igniye

## Eating and drinking



**Megan Poiniski**  
Senior Food Dive editor at Industry Dive



**Jenn de la Vega**  
Food writer and cook-in-residence at TASTE



**Brandt Maybury**  
Co-founder and managing director of Tastehead

## Getting around



**Dr. Oded Cats**  
Associate professor in transport and planning at Delft University



**James Ruppert**  
Editor of Free Car Mag



**Jack Sheldon**  
Founder of Jack's Flight Club

## Health



**Michael Fishman**  
Founder of the Consumer Health Summit



**Andrea N. Giancoli**  
Nutrition and health advocate, and registered dietician



**Deborah Wyatt**  
Founding director at talkhealth Partnership

## Home



**Peter Giacalone**  
President of Giacalone Associates



**Oliver Heath**  
Biophilic design consultant and director at Heath Design



**Dr. Harriet Harriss**  
Reader in architectural education at the Royal College of Art

## Leisure



**Serena Guen**  
Founder and CEO of SUITCASE Media



**Randy White**  
CEO of White Hutchinson Leisure & Learning Group



**Tom Holland**  
Exercise physiologist and certified sports nutritionist

## Luxury



**Dina Khalifa**  
Programme leader at the British School of Fashion



**Florine Eppe Beauloye**  
Founder and CEO of mOOnshot digital



**Pamela Danziger**  
Luxury/retail market researcher and author

## Media and entertainment



**Brian Steinberg**  
Senior TV editor at Variety



**Marcela Kunova**  
Acting editor of Journalism.co.uk



**Nia Wearn**  
Senior lecturer in games studies at Staffordshire University

## Money



**Pierre-Jean Hanard**  
Entrepreneurship lecturer at the University of Arts London



**David Birch**  
Expert on digital identity and digital money issues



**David Clarke**  
Head of policy and advocacy at Positive Money

## Shopping



**Jemima Bird**  
CEO and founder of Hello Finch



**Glynn Davis**  
Founder of Retail Insider



**Bob Phibbs**  
CEO of The Retail Doctor

## Technology



**Eric Poindessault**  
Co-founder and CEO of Biggerpan



**Dr. Blay Whitby**  
Philosopher and tech ethicist at the University of Sussex



**Paul McAleer**  
UX director at Bounteous



## BEAUTY OUTLOOK

# Made for me

As a result of the powerful conversations around diversity and inclusivity that took place in 2018, beauty standards are in flux. People are no longer content to squeeze into a pre-made mould. Instead, as cosmetics firms expand their ranges, they're under pressure to pay close attention to their customers' individual needs. From quasi-customisation to the coming of age of big data and augmented reality, 2019 will see beauty become an increasingly personalised and inclusive experience as brands make it easier for people to create their perfect products at home.



Beauty /

# Made for me

Aioryn Haust, 2018



## Tailored tech



**Dr. Barbara Brockway**

Director of personal care at Applied DNA Sciences

I think that the sea-change in our industry is going to be driven by how artificial intelligence and big data are used. A person's digital tools – whether a smartphone, bot assistant, smart mirror, or just their regular desktop screen – will be recommending products to address individual needs. Customers will experience greater benefits from these products when used according to the advice provided by their own digital beauty consultant who will be available 24/7.

The beauty industry is deep in its 'Uber' moment. Beyond consumers using smart mirrors such as the HiMirror and various apps to judge the appearance of products, the Internet of Things is connecting all our gadgets, so new at-home beauty-Nespresso-type machines can make single doses of bespoke products, designed perfectly for someone's day. These gadgets will tailor cosmetics to an individual's personalised needs.



Tanja Heffner, 2018

## On-the-go glamour



**Jillian Wright**

Co-founder of Indie Beauty Media Group

I think 2019 will see more brands focusing on taking their 'mobile' experiences to the next level. People continue to get busier but still want to look and feel beautiful. Nowadays, the modern multi-tasking man or woman doesn't have to stop at the sink to refresh. Brands are offering wipe-on and wipe-off liquid cleansers and toners that require nothing more than a cotton ball.

Millennials, who we know value experiences over possessions, are travelling more than ever, but are not quite willing to give up their beauty routines while they're away. Many brands, including those within the luxury sector, are refining their deluxe travel-size options. For instance, Yuni Beauty Flash Bath is a mousse that can be used without a standard shower or bath, Andmetics is a brand offering at-home and travel waxing kits, and Bare Me Beauty offers a dry sheet mask that can be used three times.

## Equal representation



**Bunny Kinney**

Editor-in-chief of Dazed Beauty

In 2019, we'll see progress in what's been happening around inclusivity and representation in a more pronounced way. It's really about people feeling like beauty brands and products cater to them and who they are. Beauty is becoming less about fitting in and camouflage and more about expressing yourself.

Conformity is over. People aren't interested in looking the same anymore. This is especially true of the younger end of the Millennial spectrum and Gen Zers – and beauty offers a natural, affordable, accessible way to experiment. I think gender-inclusive beauty is becoming more mainstream. We're seeing a big shift towards celebrating the individual and there's this idea now that, yes, you can stand out and be an individual, but it's not ultimately about you, it's about this shared world that we have together. That's having an impact on how things are marketed and how beauty products and brands are launched.

## Brands to watch



**HiMirror**

How is beauty getting a tech-fuelled makeover?



**Jade Beauty Roller**

How is personal care evolving to become more sophisticated?



**Milk Makeup**

How is beauty becoming more inclusive?



## CAREERS OUTLOOK

# Positive agency

With university degrees becoming increasingly expensive, young people are opting to get a head-start in the workplace through alternative education routes. In 2019, apprenticeships will grow in popularity and businesses will court young talent with lifelong learning opportunities, appealing to Gen Yers' desire for self-actualisation in the workplace and beyond.



Careers /

# Positive agency



NESA by Makers, 2018

## Employers as educators



**Adam Smiley Poswolsky**

Workplace expert and keynote speaker

I think there's going to be a push for the employer to become an educator. People are expecting their workplaces to provide skills, education, growth, and career training on the job. The workplace is becoming the new business school both in terms of hard skills (industry 4.0, AI, future-facing preparedness)

and soft skills (critical thinking, public speaking, interpersonal skills, creativity). Many are also looking for a boss who can guide them through their careers as well as their life development. It's not just professional development they're looking for, it's personal growth.

To cater to this, some companies are planning to offer reverse-mentoring programmes, intergenerational cooperation programmes, and coaching platforms. MailChimp has tapped into this idea of lifelong learning with MailChimp University, for example.



Brooke Cagle, 2018

## New intrapreneurs



**Maddie Grant**

Culture consultant at Human Workplaces

Companies are no longer defined by the traditional organisation chart, which is like a pyramid. Instead, it's more like a spiral, where people can come in at different levels and can all progress in the company by doing meaningful work. I think there's going to be an increased understanding that people have a responsibility to create their own career paths. It's on the company and the recruiter to share how that's going to be possible but, on the employee side, it's all about knowing that you can ask for these things.

We're also seeing the rise of smaller start-ups within bigger businesses. Haier has built a whole system of 'micro-enterprises', which is basically individual people inside the company who create tiny start-ups within it. We're seeing the rise of integrating much smaller companies like this because bigger organisations are hard to move. The value in being small and nimble is that you can innovate quickly.

## Career conscience



**Oliver Sidwell**

Co-founder of RateMyPlacement

People want to work somewhere where they can really make a difference. Traditional brands that just relied on their status as a big company to lure new staff are going to change up their thinking. Instead, it's companies that are socially responsible that are becoming far more attractive. That factor is going to become more important than salary or even career development for many people.

Younger employees aren't led by tradition as much because they've grown up in a world with the internet and they're very conscious of how advertising works. Companies can't just say 'we're brilliant, come work for us'. This new generation sees through that. What they truly value is someone making a real recommendation based on experience and trust. They value reality more than perception.

## Brands to watch



**MailChimp**

How are businesses encouraging lifelong learning?

**Haier**

**Haier**

How are micro-enterprises helping companies innovate?

**15Five**

**15Five**

How is behavioural science driving employee engagement?



## CITIZENSHIP OUTLOOK

# Joint responsibility

Digital platforms have given people the power to put more pressure on brands to speak up, participate, and take a stand on the issues that matter to them. No longer content to see CSR as separate from a brand's DNA, consumers want responsible decisions to start at the top – partly because they have declining faith in their own self-control. As it becomes evermore convenient to consume, people want companies to actively help them make better choices, whether that's in stemming the tide of misinformation or cutting back on the vast amounts of waste headed to landfills.



Citizenship /

# Joint responsibility

## Participation dilemma



**Tomas Diez**

Co-founder of Smart Citizen

The idealistic view of participatory democracy is in crisis as it hasn't delivered what it promised in recent years. Some see participation – not in terms of direct democracy but rather participation as a citizen – in the construction of the city, society, and everyday life. That kind of participation ranges from the type of products

you buy to the transport you use to the contribution you make to advancing knowledge. However, while there's more information available with which to make such conscious decisions, there's also more noise, which complicates the identification of meaningful information.

Apple, Google, and Nike were all built following common standards of the 20th century – prioritising the maximisation of profit – so despite being more informed, some brands make life so convenient that it's hard for consumers to cut them loose. Additionally, people sometimes know a decision will affect the environment negatively, but economic limitations inhibit pro-social behaviour.



For Days, 2018



Toa Heftiba, 2018

## Gameable platforms



**Renée DiResta**

Director of research at New Knowledge

Techniques for spreading misinformation have shifted away from creating and sharing complex content and towards simply amplifying existing narratives on social media (produced by other real people). The platforms still distribute to humans, but it's clear that algorithms are gameable. It's harder to make a new trend, but now we see more people engaging on the platforms by spreading a message.

While people are more aware of how social media can be manipulated, with many sceptical about information they encounter online, there hasn't been any significant change in the way the majority of regular users engage with such platforms. However, different organisations are getting involved in asking companies to take concerns about misinformation more seriously. The ideal outcome isn't people leaving social platforms en masse, but rather people becoming better educated.

## Regenerative mindsets



**Michael Pawlyn**

Director of Exploration Architecture

There's an urgent need to shift from a sustainable to a regenerative mindset, going beyond simply mitigating negatives to finding wholly positive ways of existing. Regenerative means having a net positive impact in myriad different ways, like restoring ecosystems and making people live healthier, longer lives. Single-use plastics and other items that are just sent to landfills are already becoming unacceptable. This change in attitudes is driving companies to rethink the way they're perceived and the way their products are made.

Lots of people are familiar with the idea of the circular economy now, but there's still quite a gap between rhetoric and reality. This gap could be a matter of cultural factors, but the more the idea becomes established as a standard that everyone is expected to meet, the more pressure there will be on companies to fulfil public demand.

## Brands to watch

**IKEA**

**IKEA**

Can brands convince customers they're instigators of change?



**Nike**

How will brands fight against the manipulation of narratives?

**FOR DAYS**

**For Days**

Are people open to a temporary ownership model?



## COMMUNICATIONS OUTLOOK

# Real talk

People are still feeling the aftershock of a polarising 2016. Whether they're fleeing into 'dark social' or tweeting directly at a CEO, they now expect brands to communicate sensitively and with integrity. When it comes to their personal lives, however, they're making room for playfulness. In 2019, the rise of image-first technologies will encourage people to drop their wordiness and communicate more visually instead.



Communications /

# Real talk



Noah Buscher, 2018

## Visually rich



**Dr. Pamela Rutledge**

Director of the Media Psychology Research Center

There is going to be a new shift towards non-textual communications (both visual and voice-activated), and the richness of this information is profound. In the same amount of time I can text something to you, I can take a picture. If you look at the pixels in each of those messages, you see how much more information is going through with an image. A smart person would choose the communication path that would let you transmit the most information possible in the least amount of time.

If you're not hung up on the 'right' way to communicate, the productivity factor would argue that you're going to see more visuals, such as live-streaming and emojis. These images are becoming extraordinarily powerful, even the silly ones. As new, visually-rich technologies, like AR and VR, become more accepted, our communication styles will get more image-based, too.



Shawn Fields, 2018

## Polarised positions



**Nancy Baym**

Principal researcher at Microsoft Research

In 2019, we're going to see an escalation in the manipulation of media in order to achieve social and political ends. We're seeing the way in which memes, for example, have been weaponised. Meanwhile, people are increasingly moving to channels like WhatsApp, where they're more difficult to track and where there's less wholesale data being collected about them. In some ways, the manner in which people communicate will not change all that much; I think it adapts to whatever sorts of media are available.

As politics in the US and Europe get more divisive, it's going to be interesting to see brands manage their public positions. For example, Nike took advantage of the protests launched by Colin Kaepernick and used that in a way that alienated some and won the loyalty of others. We're going to see more brands having to take sides, so being in the middle is going to get harder and people will be more exacting about trust and integrity.

## All-access pass



**Simon Wadsworth**

Managing partner of Igniye

People want to see brands communicate directly with their customers, partners, and suppliers through social media. When they're reviewing a product, for example, they expect brands to respond to their feedback appropriately. Companies that have avoided any sort of response mechanic are coming to realise that's a mistake and now want to understand when and how to respond. If a brand is getting 30-40 reviews a day and isn't responding, or is responding with stock answers, or only responding to positive reviews and not negative reviews, then it's incredibly frustrating for customers. You can see that frustration boiling over online.

As people expect brands to become more sociable, there's more pressure on CEOs to embody the personality of their organisations. Traditionally, most CEOs and founders remained in the background and didn't really have a profile online, but that's changing. Today, they're increasingly asked to step into the role of thought leader, which is slightly alien to some. Many are beginning to put their ideas into the world through blogs and articles, however, giving people a sense of their story.

## Brands to watch



**Giphy**  
How will people communicate without words?



**Nike**  
Will the brand continue to engage in politics?



**KFC**  
Is tongue-in-cheek marketing the key to success?



# Cultural agenda

In 2018, the Cambridge Analytica scandal shone a light on how online data could be maliciously manipulated to influence international events, while the aftershocks of #MeToo re-emphasised the ways women are subjected to sexual harassment and assault in various parts of society. As 2019's cultural agenda unfolds, the impact of these events will continue to guide people's choices when using tech brands and their expectations of media producers.



Josh Howard, 2018

## / World Cup

Though not yet as popular as the men's game, the 2019 FIFA Women's World Cup is set to be the most-watched edition of the tournament since its inception. By raising the profile of women's football, it will hopefully combat the sexist views that still exist among some fans.

## / Demanding diversity

With the BAFTAs introducing new diversity requirements for two British film categories and Disney set to release its first family film featuring an openly gay character, media producers have seemingly woken up to the demands for on-screen diversity.

## / Ethical tech

Following news that the personal data of 87 million Facebook users had been shared with Cambridge Analytica, the public's trust in social media brands has dropped significantly. Tech firms are facing pressure to demonstrate their digital ethics and commitment to privacy.

## / Mighty mouse

Disney is once again set to rule the big screen in 2019 as it releases live-action remakes of Dumbo and The Lion King alongside new Marvel and Star Wars movies. Its foray into VOD will further cement its media dominance, pushing niche content into ever-smaller avenues.



## EATING AND DRINKING OUTLOOK

# Knowledge hungry

From de-prioritising meat to shopping at farmers' markets, 2019 will see people make small but informed changes to the way they eat. Far from the ultra-disciplined diet of clean eating, the rise of 'swapping in' will see healthy and equally delicious alternatives to booze and beef reach the mainstream. Hungry for knowledge about the food they eat and how to make it, people are seeking information to better their diet while still having fun.



Eating and drinking /

# Knowledge hungry



Jesson Mata, 2018

## Edible benefits



**Megan Poinski**

Senior Food Dive editor  
at Industry Dive

Consumers are more interested in food as preventive medicine because they've realised their diet is a big component of their health so there's an increased desire to know what they're eating. Thanks to the internet and social media, they are able to research everything, so it's logical that they'll expect more from food packaging and labels. In response to consumers' demand for more information, there is a greater range of seals and certifications for products in America.

There's also been a lot of growth in the 'plant-based meat' space as companies promote lab-grown cell-cultured products. Plant-based meat is better for you because actual meat has so much fat and cholesterol, while cell-cultured meat is better for the environment. Impossible Foods has done a great job boosting excitement and momentum by creating the Impossible Burger – selling first in a few restaurants, then moving into grocery stores.



Impossible Foods, 2018

## Food lessons



**Jenn de la Vega**

Food writer and  
cook-in-residence at  
TASTE Cooking

People want to boost their skills in the kitchen. The desire has always been there, although now there's a knowledge gap between following instructions from a box you get in the mail and trying to recreate a restaurant dish. 'How-to' is the most searched term on YouTube and a new app called Jumprope focuses on these videos. Online resources have limits though, because there isn't somebody supervising and prompting adjustments, so there are educational opportunities there.

There is also growing interest in conviviality and locality, with community-sourced agriculture (CSA) gaining popularity. CSA company Local Roots sources vegetables from farms within two hours of New York City and organises up to 20 farmers' markets. People subscribe and edit orders online, then pick a nearby location so it's convenient. It's heavily guided but you choose specific produce and weigh it out yourself, offering more customisation than subscription boxes.

## Healthy balance



**Brandt Maybury**

Co-founder and  
managing director  
of Tastehead

The biggest trend within food over the next year relates to its role in improving overall health. While hardcore health enthusiasts do their research, the majority of people haven't got the time or inclination. They rely on brands and retailers to communicate the 'better-for-you options' and, if there appears to be a health benefit, foods are seen as more permissible. If you give people a healthier option and they believe it's going to taste as good as the indulgent one, most of them will choose the former.

It's a fine balance, however. If you claim something has zero calories, zero fat, and zero sugar, people will assume it tastes bad. The ice cream brand Oppo has nailed this. It doesn't attempt to tick every box, because if you try to do everything, the taste will be compromised. Instead of saying 'it's completely sugar-free and vegan', Oppo simply states that its products have 50-70% less calories, sugar, and fat than the average competitor product.

## Brands to watch

jumprope

**Jumprope**

How are people upskilling in the kitchen?

IMPOSSIBLE™

**Impossible Foods**

Will people embrace lab-grown meat?

oppo

**Oppo**

Can health food brands find a balance between virtue and indulgence?



GETTING AROUND OUTLOOK

# Selective journeys

When it comes to getting across the city, most urbanites can take their pick from a glut of transport options, from ride-sharing to electric scooter schemes. And if they want to skip town altogether, they're presented with an equally competitive landscape. Too much choice can be a challenge, however, especially if it compromises the quality of existing services. In 2019, finding a balance between comfort and convenience is top of the agenda.



Getting around /

# Selective journeys

Angelo Pantazis, 2018



## Blended modes



**Dr. Oded Cats**

Associate professor in transport and planning at Delft University

There is going to be a greater fragmentation in the transport sector, with an increasing number of both local players (like bike-sharing, car-sharing, ride-sharing, ride-sourcing companies) and global players, such as Uber and Google. These can potentially complement good quality public transport services, but there's also a risk of brands competing against each other instead of working together.

What we should see is much more consolidation across transport options, bringing together information and ticketing to help people use different modes of travel within the same trip. For example, a card or app that integrates all of these kinds of services so you can tap in and tap out of a transit journey, unload your bike, open your car-sharing scheme and pay for your Uber ride. Transport brands will have access to invaluable data about people's travel habits and this is a real opportunity to make different services work together more fluidly.



Drivy UK, 2018

## Ownerless vehicles



**James Ruppert**

Editor of Free Car Mag

Most people are terrified of buying a car outright, so they prefer anything that makes the process easier, such as Personal Contract Purchase schemes, which offer the ability to lease a car as simply as signing up for a phone contract. Rather than owning something forever, people are able to get the latest thing every two to three years – it suits the modern lifestyle.

There are some companies now that want consumers to share their cars, like Drivy or Hiyacar, so that if you don't use your car (statistics show that most people only use their vehicle two or three times a week so there's a lot of downtime) you can rent it out to other people on-demand. It's all part of this shift away from ownership. Some major car manufacturers are even beginning to see themselves as transport companies, with brands like Ford moving into sharing schemes and even bus schemes.

## Trim travel



**Jack Sheldon**

Founder of Jack's Flight Club

An increased interest in a more streamlined travel experience is what we're expecting to see next year. The airport remains a pain point for many, but there are efforts being made to automate more of the check-in and security processes. Some people are even picking trains over planes, tolerating longer journey times for the convenience of centrally-located stations and fewer protocols and restrictions.

There will also be more interest in no-frills flying as people begin to see travel as something that doesn't have to break the bank. This is tied to the rise of semi-budget airlines, offering the kind of travel experience where amenities such as food, checked bags and carry-on bags cost extra. It could be that by the end of the year, you can no longer get a transatlantic flight that includes a checked bag and prior seat selection.

## Brands to watch



**Mercedes me**  
How is transport technology evolving to serve lifestyle needs?



**Via**  
How can technology consolidate people's travel preferences?



**Drivy**  
How are sharing economy services making urban travel easier?



## HEALTH OUTLOOK

# Prudent patients

Patients in 2019 are very different to the ones visiting doctors five years ago. With a wealth of information at their fingertips, people today are aware of what they're putting into their bodies and how it is beneficial to them personally. They also know that good mental health is just as important as physical wellbeing and are therefore showing more responsibility for their own lifestyle choices.



Health /

# Prudent patients



Katherine Hanlon, 2018

## Organic cures



**Michael Fishman**

Founder of the Consumer Health Summit

Looking into the next year, we'll see a continuation of the shift to organic. People are already aware that selecting food without harmful chemicals is important, and choosing organic medication is an extension of this trend. Genexa, for example, is an over-the-counter company that dispenses organic decongestants and medications for coughs. An increasing number of health coaches have helped accelerate this shift by focusing on educating people about nutrition, food and supplements over a much longer time frame than patients would normally spend with a doctor.

Rising healthcare costs have also led the public to seek out other options and realise there are a lot of conditions they can diagnose or prevent themselves. We'll see the continued popularity of books and platforms that promote very specific information – such as what an adrenal gland is or how the digestive system works – that will lead to a new level of awareness in the consumer market.



Fathurraman, 2018

## Tailor-made diets



**Andrea N. Giancoli**

Nutrition and health advocate, and registered dietician

I think personalised nutrition is going to be the main trend in 2019. That's across all different aspects of people's life – finding what's right for me based on my lifestyle. I think people are going to become a lot more interested in the microbiome and how to nourish it so that they're healthier. Brands like DayTwo, for example, have taken advantage of this by offering personalised nutritional advice after testing individual microbiomes.

Overall, the public are more interested in the science behind wellness. But beyond thinking 'OK, what pill can I take', people do want to find balance in their lives and are looking towards holistic approaches to health, such as mindfulness, quality sleep, decreasing stress, and focusing on the mind as well as the body. There will also be an awareness of the need to interact with others and find a place within a community to look after emotional health alongside the physical body.

## Shifting accountability



**Deborah Wyatt**

Founding director at talkhealth Partnership

In the UK, the public are beginning to realise the NHS, while a fantastic service, can't be sustained as it currently is because of increasing pressures. Along with press coverage about issues like obesity and diabetes, that's leading to more awareness of the small changes people can take to improve their own health. There's subsequently a growing ownership and responsibility being taken by patients for their own conditions, without the need to go to a GP or seek medical advice.

This includes a new awareness and openness about mental health issues. Not only are the public more willing to talk about them, but employers and other institutions are recognising they have a responsibility to support people. Optimised mental health is finally being recognised as an essential part of good overall health, which is reducing the stigma.

### Brands to watch



#### Genexa

How are organic medicines making their way into the mainstream?



#### DayTwo

How are microbiome tests helping people better understand their health?



#### Welldoing

How are bespoke services removing the stigma around mental health?



## HOME OUTLOOK

# Self preservation

From easy-to-install security systems to indoor gardens, 2019 will see people endeavour to turn their homes into safe and self-sustaining spaces. Rather than portray themselves as virtuous minimalists, they'll be more interested in creating comfort-first sanctuaries that can provide respite from an increasingly uncertain world.



Home /

# Self preservation

## DIY security



**Peter Giacalone**

President of  
Giacalone Associates

Previously, people didn't think much about home security systems. But smart home integration can now offer more than just protection thanks to app-based access to lights, thermostats, garage doors, and locks. People see how these systems can offer lifestyle enhancement, giving them greater control over their home in addition to securing it.

Cameras play a significant role in this trend. People have gotten used to a degree of uncertainty when it comes to what's happening around their home, but app-compatible cameras have made it easier than ever to keep tabs on the domestic environment, alleviating any anxiety that may have weighed on their minds. We're seeing more people, who may not have installed a security system in the past, becoming dependent on these devices for peace of mind.



Jztna Usknyties, 2018



Mike Bowman, 2018

## Holistic homes



**Oliver Heath**

Biophilic design  
consultant and director  
at Heath Design

Most people spend 90% of their lives indoors and they're becoming increasingly aware of how indoor environments impact their wellbeing. People will be more concerned by how lighting affects their energy and sleep. They'll start to think about indoor acoustics and how damaging it is to be surrounded by noise 24/7. And as awareness of air quality increases in the public agenda, people will be more aware of its hidden dangers.

In light of this knowledge, nature will only become more valuable. We're certainly seeing more interest in using plants to create a sense of peace indoors. An active interest in greenery infers a sense that the home is a lush, healthy place where life can be supported to thrive and flourish. It's also a response to environmental issues and our inability to change many aspects of the places that we live in. People are responding well to the portability and sensory quality plants have to offer, thanks in part to companies like Patch and Plantabox, who are making it easy for people to improve their lives with personal indoor gardens.

## Contingency design



**Dr. Harriet Harriss**

Reader in architectural  
education at the Royal  
College of Art

People are responding to growing uncertainty in the world by investing in 'contingency design' – items and services that help them feel safe at home. On one hand, some are starting to grow their own food and, on the other, there's more interest in the installation of panic rooms and home security. Whereas people previously saw storage as something they were sacrificing space to, they're falling back in love with it, largely because they want to feel their home contains resources that could support them through any kind of critical economic insecurity.

The home is increasingly taking on the obligations of a workspace and it's also had to absorb fairly complex living arrangements as fewer people live within traditional nuclear families. Rather than seeing the home as private, people are seeing it as a commercial space. As their home's inherent value remains front-of-mind and platforms like Airbnb and Pinterest influence personal design decisions, people are becoming less likely to express their identity in home decor, instead making more conservative choices sure to appeal to future guests or buyers.

## Brands to watch

ring

**Ring**

Will smart technology change attitudes to home security?



PATCH

**Patch**

How are people cultivating a healthy atmosphere at home?

Ma·tt·er

**Matter**

Can people rethink their relationship to traditional materials?



# Economic agenda

Last year began with cryptocurrencies in the spotlight – but for all the wrong reasons. Within one month, the price of bitcoin slumped from \$19,000 to just over \$11,000 and kept falling throughout the year, demonstrating the volatility of this market. Traditional investments were also somewhat unpredictable due to tariff trade-offs and Brexit negotiations. As 2019's economic agenda unfolds, this uncertainty will affect people's everyday shopping habits and their sense of job security.



Robert Bye, 2018

## / Stable crypto

While many cryptocurrency investors aim to earn a quick buck, stablecoins could see the distributed ledger system used for its intended purpose. As their value is tied to fiat currencies (meaning they fluctuate less), they're well-suited for quick and secure everyday transfers.

## / Protectionist policies

Donald Trump's trade war against Chinese goods clearly demonstrated that the protectionist stance he took on the campaign trail was more than just hot air. The election of Jair Bolsonaro in Brazil, who similarly aims to bring business home, may pose an additional threat to free trade.

## / Brexit deal

Having secured a departure deal with the EU, the Conservative government's next challenge is passing it through Parliament. Should it fail, the Brexit process will once again be thrown into disarray, with a no-deal outcome projected to have a severe impact on all parts of the economy.

## / Mobile money

According to 451 Research, m-commerce transactions are set to surpass e-commerce in 2019, fuelled partly by the growing number of Chinese smartphone users. Given that millions of people worldwide can only get online via their phones, this retail segment will continue to grow.



## LEISURE OUTLOOK

# Home comforts

Leisure time is as precious as ever, with staying in replacing going out for 2019. There are high-tech home workouts chasing at the heels of boutique fitness classes, affordable VR and AR tools entering living rooms, and a burgeoning interest in staycations. People are seeking more personalised, worthwhile recreational activities that maximise on experience without cutting any of the convenience.



Leisure /

# Home comforts



Toa Heftiba, 2018

## Hyper-personal trips



**Serena Guen**

Founder and CEO of SUITCASE Media

Travel is becoming increasingly personalised, especially at the top end of the sector where there has been a rise in exclusive concierges and experiences. People are trying to one-up each other – visiting a pop-up hotel concept, escaping to a desert island, or doing a round-the-world yacht trip. At the same time, achievement

travel is one to watch – going somewhere to accomplish something new or learning a skill. It’s travel with a purpose, whether that’s climbing Kilimanjaro, helping to restore a chateau in France, or learning to knit in the Faroe Islands.

There’s also a growing demand for flexibility as people want to feel more in control of their time. They might want to work from home more, take a sabbatical at 50, or settle into a Balinese co-working space for a year. It’s super cheap and allows them to continue their job. There are lots of pros and cons to that lifestyle, but it’s what people are aspiring to.



Peloton, 2018

## Domestic bliss



**Randy White**

CEO of White Hutchinson Leisure & Learning Group

We keep talking about the experience economy, but people aren’t going out much anymore. This shift to digital leisure has been a continuous rather than a dramatic one, with the percentage of income spent on out-of-home entertainment remaining almost constant. By contrast, the percentage spent on digital options – smartphones, big screen televisions or subscription services like Netflix – is dramatically increasing. Affordable virtual reality and augmented reality are only going to enhance the attractiveness of staying at home.

As a result, brands must offer a higher fidelity experience to compete with the low-cost convenience of all the digital options at home. That means providing something great enough to motivate people to shun convenience and spend more time, money, and effort. Any facility with fixed attractions, like a theme park or family entertainment centre, won’t do as well in the future. People have an attitude of been there, done that – the established ‘same old’ norm doesn’t cut it anymore.

## DIY workouts



**Tom Holland**

Exercise physiologist and certified sports nutritionist

The fitness industry will move from the gym to the home. More people will create their own home set-ups and established gyms must change accordingly. Businesses in the industry are starting to offer more options, whether that’s home workouts or expanding fitness technology. Peloton has been disrupting the sector and competing with SoulCycle. People might love the latter, but they’re doing Peloton at home 100 times more than getting to a class. My analogy is it’s like movie theatres – they’ll always be around as it’s great to experience a movie with others, but we’re more likely to use Netflix at home.

Motivation has always been a problem in the fitness industry and behavioural changes will happen when people get away from the weight loss focus. The behavioural change in the fitness and nutrition industry will be what is called ‘non-scale victories’. The overall benefits of exercise have been overlooked for too long. We’re living longer than ever and functional fitness isn’t just adding years to our lives, but adding life to our years. People are going to invest in nutrition and home fitness so they can enjoy those years.

## Brands to watch



**Velocity Black**

How will AI impact travel decisions in the future?



**TOPGOLF**

**Top Golf**

How will social venues evolve to attract footfall?



**PELOTON**

**Peloton**

What impact will home workouts have on the gym sector?



## LUXURY OUTLOOK

# Young money

As Gen Yers settle into adulthood and accrue more spending power, luxury brands are having to evolve to stay relevant to their values. In a bid to cater to a cohort that views luxury as a channel for their creative self-expression, watchmakers are harnessing digital tech, fashion labels are celebrating gender diversity, and retailers are enabling more cross-industry 'contamination'.



Luxury /

# Young money



Owen Spencer, 2018

## High-tech trinkets



**Dina Khalifa**

Programme leader at the British School of Fashion

The demand for digital luxury is transforming the industry. Young people are after products that integrate tech as opposed to just seeking out old-fashioned craftsmanship. A key example of the rise of digital luxury is the popularity of active watches. Gen Yers do not see the value in a luxury watch alone – it's the technology in a digital timepiece that is the added value for them. In this sense, the values this generation have developed are quite different from those they inherited from their older counterparts.

As Swiss watch manufacturer Patek Philippe once suggested, luxury watches are not items you own, you simply take care of them for future generations. Gen Yers don't necessarily have this long-term vision – they don't get married as much and they don't have kids as much. They're buying for now, not for future investment, so a digital watch is much cooler. This poses a challenge for luxury watch manufacturers: how do they reach out to Gen Yers with traditional values more relevant to their elders?



Dmitry Ilkevich, 2018

## Variety seekers



**Florine Eppe Beauloye**

Founder and CEO of mOOnshot digital

The definition of luxury will continue to broaden as luxury shoppers evolve to include a more diverse set of profiles. Increasingly, luxury is becoming about inclusivity and enabling self-expression. People want to incorporate their own personalities into the products they purchase and, as such, diversity and gender fluidity are gaining momentum. Chanel debuted its men's make-up line, Boy de Chanel, and luxury fashion houses such as Louis Vuitton, Burberry and Dior have already begun embracing diversity on the runway.

Cross-industry 'contamination' – collaborations and new offerings that magnify a brand's DNA rather than distort it – will affect even the most traditional luxury houses. This is why you see retailers such as Net-a-Porter, Saks Fifth Avenue, or Neiman Marcus selling wellness products. Luxury brands increasingly have to reach outside their comfort zones to court youth, through everything from capsule collaborations to strategic creative talent appointments. Young people are no longer 'absolute' luxury shoppers. They mix and match the high with the low to express their personal style.

## Democratic luxury



**Pamela Danziger**

Luxury/retail market researcher and author

Young people want luxury that is more democratic than before. Everybody wants to be wealthy, but when Gen Yers look at the rich, they also see elitism, implicit class structures, and income inequality. They are not necessarily looking to conform to any particular social markers. Instead, they're looking for luxury that they can proudly define themselves by and which makes them feel fulfilled. It's luxury on the inside, not the outside, that counts.

There's now a large swathe of young people for whom the idea of wearing a logo or being a conspicuous consumer is anathema. This is not to say the Kim Kardashians and luxury influencers of the world are not going to carry clout in 2019. The recently rich are still clambering for old social status markers and looking for Louboutin shoes, but brands can't assume consumers are just going to pay up because they've got a heritage logo on their product. They have to actively tap into the new democratic spirit of luxury.

## Brands to watch

### BURBERRY

#### Burberry

Are digitalised in-store experiences sustainable going forward?



#### Boy de Chanel

How is gender fluidity transforming the luxury sector?

### Istdibs.

#### 1stdibs

How is luxury home decor going down the do-it-yourself route?



## MEDIA AND ENTERTAINMENT OUTLOOK

# Suspended reality

With political crises, natural disasters, and global conflict playing out in a 24-hour cycle of bad news, many viewers are seeking some form of escape. Whether they're paying more attention to 'solutions journalism', which promotes hopeful aspects of world news, or fleeing into mobile gaming, they're finding ways to lighten the tone. Making the most of this appetite for engrossing content, advertisers are edging into TV shows via sponsored



Media and entertainment /

# Suspended reality



Christian Fregnan, 2018

## Branded content



**Brian Steinberg**  
Senior TV editor at Variety

As streaming platforms and subscription-based content continue to dominate the way people consume entertainment media, their appetite for ad breaks is diminishing. This means advertisers are having to get creative with product promotion, particularly when it comes to TV.

Subscription fees and ad-blockers have allowed people to get used to watching programmes without the distraction of advertising, but live TV still relies on this revenue stream to create and broadcast new content. In the US, late-night shows have started returning to old-school ‘sponsored by’ messaging as a solution. Stephen Colbert, for example, introduced a sketch that was sponsored by Google, while James Corden’s *The Late Late Show* has a branded Heineken bar on set. Both strategies have enabled broadcasters to invest more time in content creation and avoid long ad breaks. These types of sponsorship provide a better avenue for advertisers to cater to modern viewers.



Sean Do, 2018

## Goodwill hunting



**Marcela Kunova**  
Acting editor of Journalism.co.uk

With an abundance of negative news causing many viewers to switch off, 2019 will see outlets increase the positive spin on their reporting. It is impossible to reflect on 2018 within the media sphere and not talk about Brexit and Trump, or to mention shock election results around the world and the refugee crisis, but newspaper headlines and prime-time features that continuously highlight the sorry state of the world are overwhelming audiences.

‘Solutions journalism’ that focuses on the positive and hopeful aspects of world news, such as government initiatives and charity organisations, help lift the media narrative and motivate audiences, rather than leaving them disheartened. *The Guardian* and *The New York Times*, which publish weekly newsletters promoting goodwill stories and solutions to social problems, will inspire more reporters to look for the bright side of their stories to keep readers engaged in 2019.

## Multi players



**Nia Wearn**  
Senior lecturer in games studies at Staffordshire University

Gaming companies are starting to recognise how profitable alternative audiences can be and are beginning to engage with them in a much more meaningful way. Middle-aged females, for example, don’t consider themselves gamers, but they often max out the levels of the games they are playing and spend around £15 a week on in-game purchases.

They aren’t loyal to any specific developers and don’t tend to use forums to communicate with other players, so developers have had a hard time recognising them previously. But by using similar mechanics across new games that use the same currency, developers can start to understand this demographic better.

Forums such as Discord are helping other niche members of the gaming community find their voice with a variety of specific channels just for fans of particular games, and for providing update suggestions and feedback. These chats have enabled players to come together and feel empowered by communicating directly with designers and developers.

## Brands to watch



**Stephen Colbert**  
How is TV embracing sponsored content over traditional advertising?



**The New York Times**  
Can newspapers keep readers engaged through feel-good stories?



**Discord**  
Can new forums help developers engage with alternative gamers?



# Environmental agenda

In 2018, campaigners called upon global citizens and policymakers to take urgent action against climate change. At the same time, however, cynicism grew from some quarters, with the US, Russia, Saudi Arabia and Kuwait blocking the endorsement of a landmark UN report on the state of the world's future. People are crying out for other parties to now make a positive impact, and as 2019's environmental agenda unfolds, this pressure will manifest in changes to everyday shopping decisions and consumers' relationships with brands.



Ben Blennerhassett, 2016

## / Corporate collaborators

Brands are showing a heightened sense of responsibility around environmental issues, with Selfridges and Iceland among the retailers going palm oil-free. Many others have promised action on single-use plastics, helping to win over an increasingly eco-conscious public.

## / Humanised havoc

The hurricanes, wildfires, and extreme temperatures experienced across the world in 2018 are set to be followed by a new El Niño event in early 2019. As the realities of climate change become easier to visualise, younger generations are demanding immediate action.

## / Cultured cuts

While vegan diets have grown in popularity, lab-cultured meat remains a niche product. But as it makes its way on to supermarket shelves, it's being hailed as a sustainable solution to world hunger that can suit the tastes of those looking to cut down on the real thing.

## / Fracking fracas

With thousands of acres of land and sea auctioned off for oil and gas extraction, concern is growing over the link between the fracking process and seismic events. As public knowledge around the issue grows, activists are taking matters into their own hands.



## MONEY OUTLOOK

# Personal power

Traditional banks have faced no shortage of challenges since the recession, from plucky disruptors to scandals that have led to a decline in trust. Thanks in part to the greater freedoms offered by challenger banks such as Monzo and Starling, as well as the potential of centralised, digital currencies just over the horizon, people are taking back control from a previously restrictive financial system.



Money /

# Personal power



Starling Bank, 2018

## Taking liberties



**Pierre-Jean Hanard**

Entrepreneurship  
lecturer at University  
of Arts London

AI will become a natural add-on to the banking experience going forward into 2019. We're on the move all the time, so these services need to be where the customer is. This represents a shift in approach, where banks would previously prioritise their own requirements and expect customers to adapt. Nowadays, people have little patience for poor

systems. Their views of banking have changed. We want to delegate the tasks we do not like and recognise that we can be more efficient if we delegate to a good machine.

Challenger banks are changing the sector. They've introduced very limited constraints for customers and have a good understanding of the customer experience. It's about providing convenience. In the future, tech giants like Amazon and Google are the most likely to put banks at risk – not by being banks themselves, but because they 'own' the customer. They are exactly where the customer is. They're in our kitchens and on our phones, and that's their strength. As long as you have a system that is clear, immediate, and obviously positive, people will feel confidence when using it. But it's a loop that can very easily be broken.



Tyler Nix, 2018

## Evolving security



**David Birch**

Expert on digital  
identity and digital  
money issues

The biggest thing on the financial horizon for next year is secure authentication. We're seeing exponential growth in open banking, so it's integral to smooth these new pathways. There's a big focus on passive authentication, in particular. In 2019, we'll begin to see banking technology recognise users

based on a picture it derives from their location, habits, and devices. We won't have to worry about PIN codes and passwords, the app will know it's us.

We've not been making much progress in this area even though our security requirements continue to grow. The failed rollouts of universal digital identity systems, like the UK government's Verify scheme or the Indian government's Aadhaar programme, nonetheless got people thinking about better ways to affirm their identity. Once the related problems are ironed out, we'll see digital wallets once again pushed to the fore, freeing them up to help organise our finances.

## Centralised spending



**David Clarke**

Head of policy  
and advocacy  
at Positive Money

Sweden will become the first country to pilot the use of a central bank digital currency and a digital version of cash. I expect to see more and more countries announcing similar projects in 2019, with central banks scrambling to avoid being left behind as payments evolve.

It's a threat to the banks because it means that people will be storing their money in a different way. The rationale for it, from the central bank's point of view, is that it reduces the risk in the payment system. If we rely on a handful of big banks to store our savings and make payments, and one of those banks fails, then millions of people lose access to their money. Trust in traditional banking is low, especially in light of recent failures, which has been driving people to look for alternative methods of money management. This is one way of putting the payment system in public hands where that access is protected.

## Brands to watch



STARLING BANK

**Starling Bank**

How are challenger banks forcing traditional players to adapt?

**Uber**

**Uber**

Will the launch of Uber Cash reignite digital wallets?



**E-krona**

How will the first central bank digital currency impact the financial system?



## SHOPPING OUTLOOK

# Two-way street

The shopping landscape has been in flux over the past decade. Amid rising rents, competition from new players, and e-commerce offering the highest convenience, traditional retailers are under pressure to adapt. But people aren't discounting the benefits of heading in-store to make a purchase or try out a product. Just as brick-and-mortar shops are scrambling to meet the demand for convenience, digital retailers are opening physical spaces to





Shopping /

# Two-way street

## Experience first



**Jemima Bird**

CEO and founder of Hello Finch

There's lots of talk about technology and how it's innovating retail, but if we look at the in-store experience, technology can't replace emotional interaction. We already know that we should not see online as a direct competitor to offline. We should use that thinking to reimagine the traditional approach to shopping, whether that means changing what the high street represents or reinventing the role of the customer assistant.

The power of experiential retail will become more crucial in 2019 as convenient ordering and delivery models disincentivise people from purpose-led shopping. Retailers are under pressure to be less soulless and transactional. Instead, they would do well to appeal to the other reasons people buy things – because of an emotional connection or a need for entertainment – rather than simply wanting more possessions.



Felippe Schiaroli, 2018



Xuanjuan Hu, 2018

## Augmented humanity



**Glynn Davis**

Founder of Retail Insider

AI has been successfully used to streamline retail back office functions – lots of businesses are already using robotics in low-key areas like stocktaking and inventory management. And if we look at the shop floor, AI can empower shop assistants with more information so they can better advise customers. In the same breath, with the increase of online sales, we'll see more people in back-end roles, like analytics.

These technologies will help brands keep up with people's rocketing expectations for convenience. Delivery will continue to be a big component of retail, with click-and-collect increasing in popularity and developments such as Amazon Key giving businesses trusted access to the private space of the home. Potentially, we could see everything from deliveries to repairs to add-on services like someone cooking meals for you from your grocery delivery being developed. Brands will have to be cautious about people's privacy concerns, but it's an exciting time.

## Phyigital connection



**Bob Phibs**

CEO of The Retail Doctor

In 2019, the idea that products are going to find us will have increasing prominence. People won't have to go looking for something to buy. Instead, more experiences – such as streaming video or browsing social – will become 'shoppable' and this will continue to build as algorithms get smarter. However, we may see a tipping point when people realise the wastefulness of shopping online, which may lead to a renaissance for brick-and-mortar stores.

Everybody is out to thwart Amazon's dominance in the retail scene, largely by providing more enticing in-store experiences that blend the convenience of digital with the tactility of physical. Many retailers are using click-and-collect to encourage people to see going in-store as more convenient than waiting around for a delivery, especially those with a good proportion of locations. Target is giving people various different ways to buy – you can come into the store, you can buy online and pick up at the store, you can have curbside delivery. Even if the company might be losing money trying to figure it out, the advantages will be worth it.

### Brands to watch

macy's

**Macy's**

How can physical spaces use tech to their advantage?

TARGET

**Target**

What retail strategy best caters to delivery divas?

brooklinen

**Brooklinen**

How can offering a tactile experience boost online sales?



## TECHNOLOGY OUTLOOK

# Private eyes

Following the Cambridge Analytica scandal, privacy is on many web users' minds. But they're not ready to sacrifice personalisation, convenience, and seamlessness for tighter restrictions. Next year will see the tech industry focus on bettering the user experience while keeping tabs on what's happening with sensitive data behind the scenes. Brands will use AI to make digital experiences feel more personal and get creative with UX design, while navigating impending regulation and concerns around privacy.



Technology /

# Private eyes



Lucrezia Carnelos, 2018

## Personalised privacy



**Eric Poindessault**  
Co-founder and CEO of Biggerpan

People’s digital experiences are now better connected thanks to AI, but there are lingering issues related to privacy. People want AI to help them share photos easily, but they don’t want their insurance firms to know everything about their lives or to access their pictures. Companies are working on facilitating seamlessness while offering new solutions for these privacy

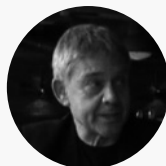
problems. On the one hand, AI models will be processing large amounts of data in the cloud and using anonymous datasets. On the other hand, processing at ‘the edge’, or on device, will allow for more personalisation and data security for users.

We know we can do a great deal with AI in the cloud, but research lately has focused on trying to reproduce the performance levels with models that require less data – ones that can be pre-trained and embedded on devices. It’s why some tech manufacturers are building chipsets that can run AI models on small devices like a smartphone. If you tailor those models to fit on a phone and you run them on a chipset, you can get state-of-the-art results without having as much data as other models.



Charles Deluio, 2018

## Regulated tech



**Dr. Blay Whitby**  
Philosopher and tech ethicist at the University of Sussex

There is a fundamental conflict of approach between certain social networks and the regulatory powers. Facebook, Google, Amazon, and Apple are all making vast profits out of having people’s personal data. There’s a major conflict in that approach and the approach of the European Union, particularly with the General Data Protection Regulation legislation imposed in 2018.

In 2019, there is going to be growing tension – maybe even an open fight – between firms that are making money out of people’s personal data and state and supranational organisations like the EU that think individuals should own their data. This means there’s room for alternative, more data-responsible companies. If some clever start-up could have a business model that was friendlier to the data approaches of the likes of the EU and the US, then there might be an opportunity for them in the market. It’ll be good business in 2019 to say how ethical you are, especially now both users and governments are watching closely.

## Easy navigation



**Paul McAleer**  
UX director at Bounteous

Some of the interface-related trends that emerged a few years ago have really come into their own. Companies are removing the need for navigation from their interfaces pretty significantly, enabling it to be all about the content. Rather than having navigation split out, for example, they’re making sure it’s content that’s guiding people through the app or site.

Tech brands are also diversifying their offerings in terms of interface. They might include chatbots or pure voice UIs, blending offline and online, and making something that is a little more cohesive and more of an omnichannel experience. Those that have sat on the sidelines of this over the past couple of years have now taken note that it’s time to catch up with the competition. It’s leading to a more creative approach, with brands moving away from basic screen interfaces to make space for more VR, AR, voice interfaces, and so on, while also aiming for more personalisation in UX.

## Brands to watch



**Hugging face**  
Will chatting with AIs become the norm?



**Port.im**  
How will brands navigate fears around data privacy?



**Unforgettable**  
How will UX evolve to cater to differently-abled users?



# Political agenda

In 2018, America saw a small blue wave as the Democrats took back the House of Representatives – a result that may stifle Donald Trump’s policies and potentially open the door to impeachment proceedings. Meanwhile, the poisoning of Sergei Skripal and murder of Jamal Khashoggi prompted widespread condemnation of Russian and Saudi leaders. As 2019’s political agenda unfolds, it will open people’s eyes to just how much (or how little) power they have over domestic and international affairs through voting and protesting.



*Dmitry Ilkevich, 2018*

## / Tory schism

She may have survived a vote of no confidence from Tory MPs, but Brexit could yet cost Theresa May her job. Party in-fighting risks dooming her proposed deal and even if it does pass, she’s already said she won’t lead at the next election due to internal opposition.

## / Refugee repatriation

Efforts to repatriate refugees in 2019 face major problems. While many Syrians harbour concerns about documentation and property, Rohingya refugees fear continued persecution in Myanmar, and those from Central America are committed to gaining asylum in safer states.

## / EU election

The rise of anti-establishment parties may tip the balance of power in the EU parliament towards the right in May 2019. While France and Germany are calling for closer integration, domestic concerns could lead people to elect MEPs focused on limiting the bloc’s reach.


## / Hostile actors

Enquiries into the Salisbury poisonings and Jamal Khashoggi’s death heavily implicated Russian and Saudi leaders, sparking diplomatic tensions. A lack of answers and continued political ties will keep the public’s gaze on these nations, though this pressure has had little impact.




# Brands to watch


## Beauty

**HiMirror**

How is beauty getting a tech-fuelled makeover?


**Jade Beauty Roller**

How is personal care evolving to become more sophisticated?


**Milk Makeup**

How is beauty becoming more inclusive?


## Communications

**Giphy**

How will people communicate without words?


**Nike**

Will the brand continue to engage in politics?


**KFC**

Is tongue-in-cheek marketing the key to success?


## Health

**Genexa**

How are organic medicines making their way into the mainstream?


**DayTwo**

How are microbiome tests helping people better understand their health?


**Welldoing**

How are bespoke services removing the stigma around mental health?


## Luxury

**Burberry**

Are digitalised in-store experiences sustainable going forward?


**Boy de Chanel**

How is gender fluidity transforming the luxury sector?


**1stdibs**

How is luxury home decor going down the do-it-yourself route?

## Shopping

**Macy's**

How can physical spaces use tech to their advantage?


**Target**

What retail strategy best caters to delivery divas?


**Brooklinen**

How can offering a tactile experience boost online sales?


## Careers

**MailChimp**

How are businesses encouraging lifelong learning?


**Haier**

How are micro-enterprises helping companies innovate?


**15Five**

How is behavioural science driving employee engagement?


## Eating and drinking

**Jumprope**

How are people upskilling in the kitchen?


**Impossible Foods**

Will people embrace lab-grown meat?


**Oppo**

Can health food brands find a balance between virtue and indulgence?


## Home

**Ring**

Will smart technology change attitudes to home security?


**Patch**

How are people cultivating a healthy atmosphere at home?


**Matter**

Can people rethink their relationship to traditional materials?


## Media and entertainment

**Stephen Colbert**

How is TV embracing sponsored content over traditional advertising?


**The New York Times**

Can newspapers keep readers engaged through feel-good stories?


**Discord**

Can new forums help developers engage with alternative gamers?


## Technology

**Hugging Face**

Will chatting with AIs become the norm?


**Port.im**

How will brands navigate fears around data privacy?


**Unforgettable**

How will UX evolve to cater to differently-abled users?


## Citizenship

**Ikea**

Can brands convince customers they're instigators of change?


**Nike**

How will brands fight against the manipulation of narratives?


**For Days**

Are people open to a temporary ownership model?


## Getting around

**Mercedes Me**

How is transport technology evolving to serve lifestyle needs?


**Via**

How can technology consolidate people's travel preferences?


**Drivy**

How are sharing economy services making urban travel easier?


## Leisure

**Velocity Black**

How will AI impact travel decisions in the future?


**Top Golf**

How will social venues evolve to attract footfall?


**Peloton**

What impact will home workouts have on the gym sector?

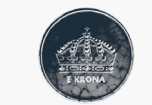
## Money

**Starling Bank**

How are challenger banks forcing traditional players to adapt?

**Uber**

Will the launch of Uber Cash reignite digital wallets?

**E-krona**

How will the first central bank digital currency impact the financial system?



Expert Outlook 2019

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## Contact

Jerome Linder  
[jerome@canvas8.com](mailto:jerome@canvas8.com)  
+44 (0)20 7377 8585  
+44 (0)7746 138 264

James Cunningham  
[james@canvas8.com](mailto:james@canvas8.com)  
+44 (0)20 7377 8585  
+44 (0)7832 258 749

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