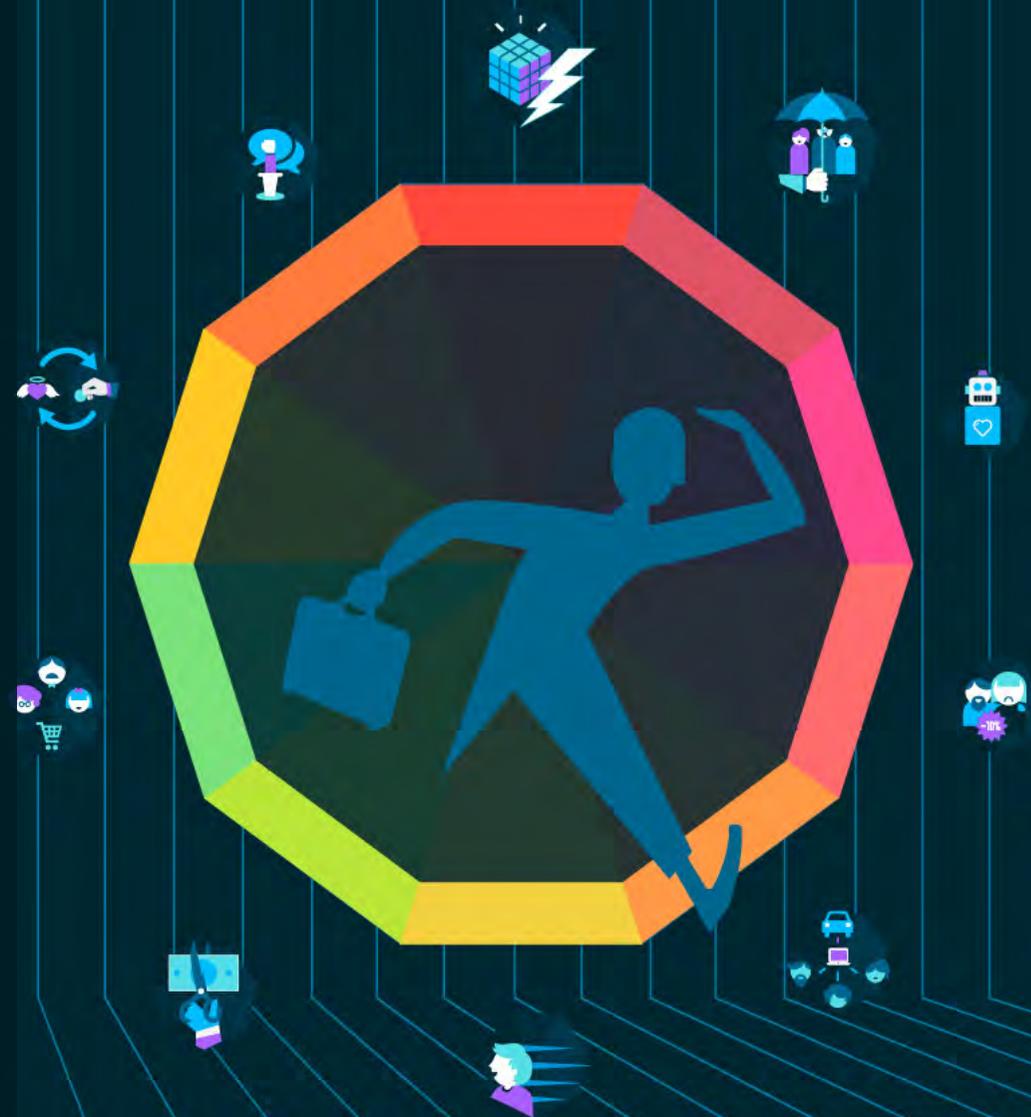




DEC 2014 / JAN 2015
GLOBAL TREND BRIEFING

10 TRENDS FOR 2015

And 10 prime innovation opportunities
to run with – and profit from – in 2015!



So you've read a lot of 'for 2015' lists recently.

Here's why this one is different ;)

We know: your inbox is already full of MUST READ predictions for 2015. And no doubt some of them were great.

So you're already well versed in the Big Changes coming. The Internet of Things (yes, more of it). More smartphones. Economic recovery (the US). Economic slowdown (China). Economic uncertainty (pretty much everywhere). Aging populations. More China. You know the drill.

This list is different. First, it's consumer trends that we're interested in. Not the ongoing macro-trends (see above) that will form the backdrop to 2015.

Second, and more important, when it comes to this list the trends aren't really the point...

This list is all about actionable opportunity.

Trends are just a means to an end: successful (and profitable!) innovation.

An industry secret:

Trends aren't really the point – opportunities are.

So, time to be transparent: yes, our list does feature the Internet of Things. But in the INTERNET OF SHARING THINGS you'll discover one exciting way to do something with these technologies, for consumers, in 2015.

The same goes for each of the 10 trends below: each one highlights a key, actionable innovation opportunity that could see **YOU** serve, delight, surprise or build stronger relationships with your customers. Indeed, you could (and should!) start putting at least one of these into action tomorrow, if not in the weeks and months ahead!

So all set? Read, be inspired, then get going!

10 trends shaping consumerism in 2015

And 10 ideas to put into action.
TOMORROW! ;)

1. INSTANT SKILLS »

All the gear, AND the idea.

2. FAST-LANING »

The end of the line for waiting in line.

3. FAIR SPLITTING »

Mobile wallets find their (shared) value.

4. INTERNET OF SHARED THINGS »

New connections. New behaviors.
New opportunities.

5. BRANDED GOVERNMENT »

Time to get behind corporate-powered civic change.

10 trends shaping consumerism in 2015

And 10 ideas to put into action.
TOMORROW! ;)

6. POST-DEMOGRAPHIC CONSUMERISM »

Demographics are dead! Long live demographics!

7. CURRENCIES OF CHANGE »

Because good behavior should no longer (just) be its own reward.

8. SYMPATHETIC PRICING »

Pain point-targeting discounts.

9. ROBOLOVE »

2015: Rise of the Robots.

10. BRAND STANDS »

Get off the fence!

1. INSTANT SKILLS

All the gear, AND the idea.



1/10 TRENDS FOR 2015

INSTANT SKILLS

Why 2015's status-hungry prosumers will LOVE services that allow professional-quality output – minus the learning or time barriers.

We've been banging on about STATUS SKILLS for years now (since [2006](#)). And in 2015 – fueled by everything from mass affluence to digital narcissism – hundreds of millions of 'post-status' consumers will care less about what they *have or buy* and more about what they can *do or create*.

Nothing new there. But, with cravings for lifestyle maximisation still as intense as ever, **reducing if not eliminating the barriers to the creation of high quality output will be the key to delighting aspirational consumers everywhere in 2015.***

Mindful of how Instagram created an army of instant art-photographers, try kicking off a brainstorm by asking how your products and services give [prosumers](#) the INSTANT SKILLS (and corresponding status fix) they will *demand* in 2015.

** If this trend offends your Protestant work ethic ;) remember that for every trend there are counter-trends. Alongside INSTANT SKILLS, there will be other (smaller but often more intensely devoted) tribes who will prioritize the journey, rather than the destination.*

FEATURED INNOVATIONS: INSTANT SKILLS

Seedsheet, Paleta and HEXO+

Crowdfunding during November 2014, the [SeedSheet](#) offers aspiring gardeners a simple 'plug and plant' approach. The service enables customers to enter the location of their garden (to identify which plants will thrive), and plan their bed using the online garden-building software. A custom 'Seedsheet' is then despatched, which can just be unrolled onto soil and watered.

Announced in September 2014, US-based [Palate Home](#)'s Smart Grill promises to ensure that food is perfectly cooked. The sensor-equipped device connects to an accompanying app, through which the user ('chef'? ;) inputs what's being cooked and their cooking preference. The grill can sear meat, and automatically hold food for up to an hour once cooked.

[HEXO+](#) is a drone that follows and films its users autonomously. Once people have entered the perspective from which they wish to be filmed, the drone follows their every move, automatically maintaining the desired framing. Developed in the US, the HEXO+ raised over USD 1.3 million on Kickstarter in July 2014.

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2. FAST-LANING

The end of the line for waiting in line.



2/10 TRENDS FOR 2015

FAST-LANING

In 2015, expect perennially time-starved customers to expect accelerated physical service options, especially from brands they extend their loyalty towards.

After a year where mobile-powered, on-demand startups found favor with consumers from London to Lagos, where will demands around customer service head next?

In 2015, more consumers – accustomed to total control – will expect those brands that they give a lot of money to, and therefore often spend a lot of time with, to provide an optional FAST LANE through on-site wait times.

Of course, multi-tiered service provision is not suitable for all situations and [can upset paying customers](#) (if handled crassly paid FAST LANES will just draw attention to sub-standard normal service). But winning brands will design FAST-LANING solutions that benefit all customers, even if that's in part by removing the most time-sensitive customers from the 'slow' lanes.

Something to 'run' with in the months ahead?

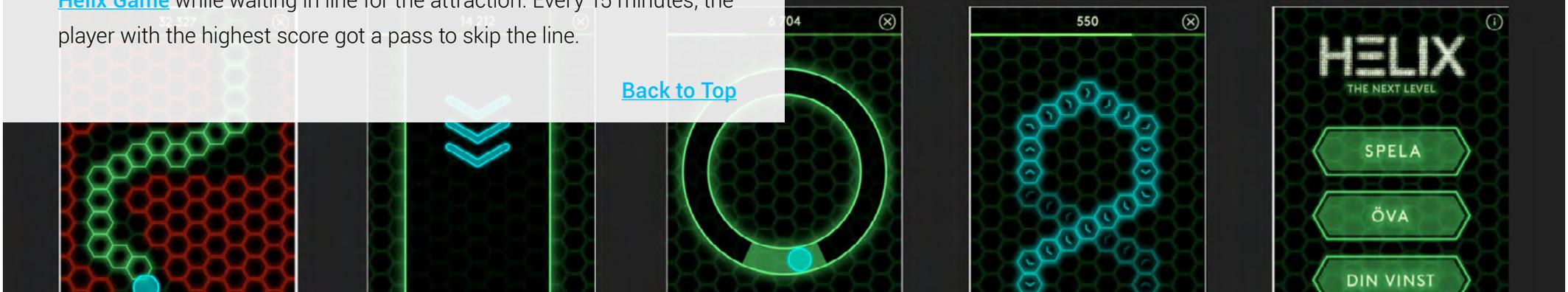
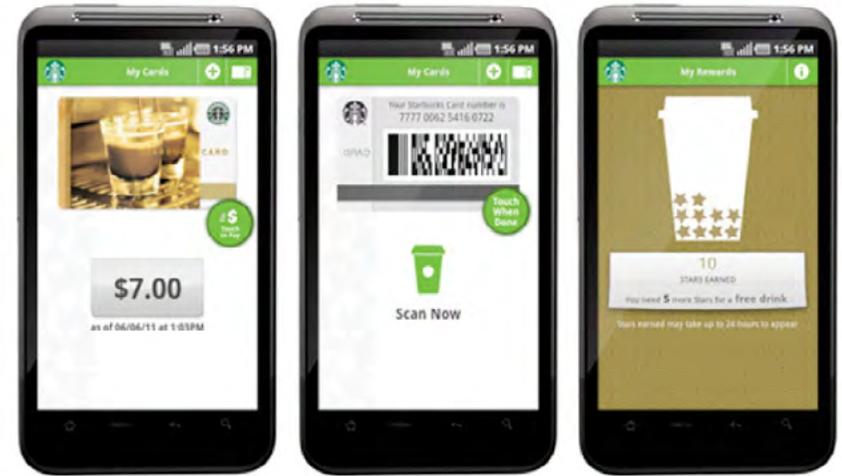
FEATURED INNOVATIONS: FAST-LANING

Starbucks, Taco Bell, luxury hotels and Liseberg amusement park

In October 2014, [Starbucks](#) announced a new 'order ahead' function for its app, planned to roll out across the US during 2015. In the same month, [Taco Bell](#) also enabled customers using its app to place – and pay for – an order while they are en route to a drive-thru, and have it waiting for collection upon arrival.

Q3 2014 saw the Starwood, Hyatt and Hilton hotel chains all [test initiatives](#) allowing guests enrolled in their loyalty programs to check in via their apps and use their mobiles as room keys, in order to avoid wait lines at the front desk.

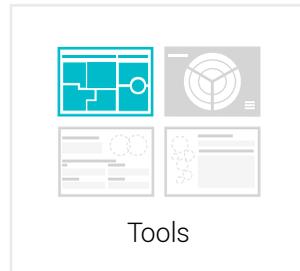
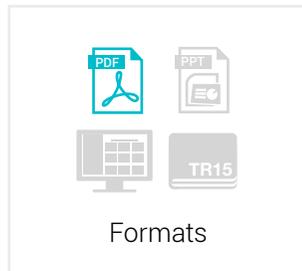
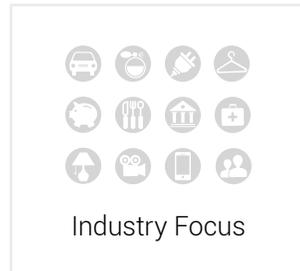
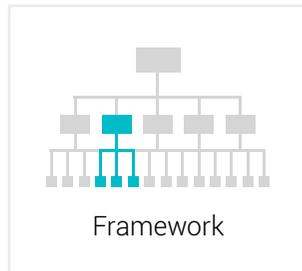
For a fun and creative FAST-LANING initiative, look to Swedish amusement park Liseberg, who in June 2014 released an app to accompany its new Helix roller coaster. Attendees could play the free [Helix Game](#) while waiting in line for the attraction. Every 15 minutes, the player with the highest score got a pass to skip the line.



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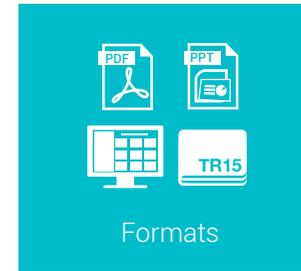
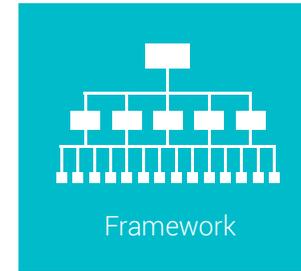
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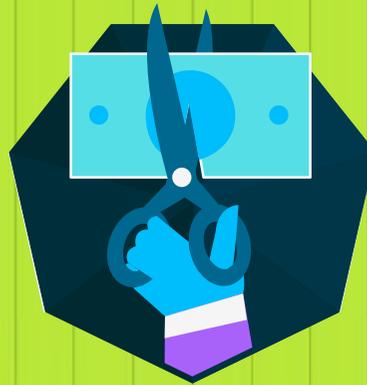
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3. FAIR SPLITTING

Mobile wallets find their (shared) value.



3/10 TRENDS FOR 2015

FAIR SPLITTING

Those planning to simply accept mobile payments in 2015 will fall behind the curve. One way to go further? Let m-payments facilitate new ways to share and split costs, and add new value for consumers in the process

2015 will (finally!) be the year when mobile payment platforms become commonplace. Starbucks now processes 7 million mobile payments a week in the US. Venmo processed USD 700 million in Q3 2014, up 500% in a year. Apple Pay saw 1 million cards registered in its first three days after launch. And by 2017, there are forecast to be 450 million mobile payment users, up from 245 million at the end of 2013 (Juniper Research, June 2014).

One practical opportunity? **FAIR SPLITTING, and the use of new forms of real-time tools and data to help consumers seamlessly share costs.** And not just for products, but services and experiences, too.

Need more data to convince your boss/client? A recent study found that 45% of Millennials in the US & UK would like to use their mobiles to split bills with friends (JWT, October 2014).

Your challenge for 2015: turn the moment of payment into a moment of pleasure for your customers.

FEATURED INNOVATIONS: FAIR SPLITTING

Lyft Line, Audi Unite and Guevara

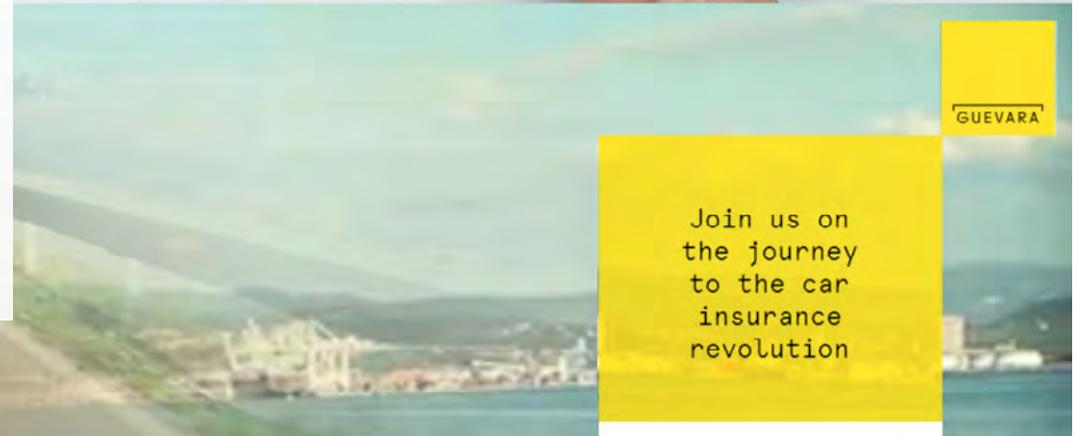
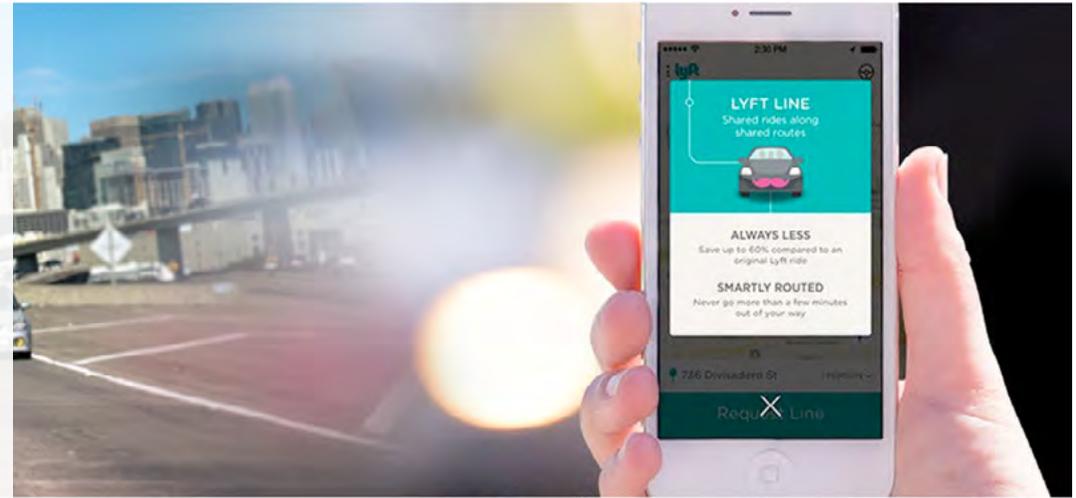
One sector where new possibilities are being opened up is the auto sector:

US ride-sharing service Lyft launched [Lyft Line](#) in August 2014. Users can save up to 60% by opting to have their ride pick up other passengers traveling along a similar route. In November 2014, the company reported that 30% of journeys in San Francisco were via Lyft Line, and will roll out nationwide during 2015.

Announced in October 2014, [Audi Unite](#) enables customers in Sweden to share a car in a private network of up to 5 people (friends, colleagues or neighbors). Via the app, users can view the location and availability of the car, and can access the vehicle using a smart key fob. Depending on the agreement, drivers are charged either a usage-based or fixed monthly fee.

UK-based car insurer [Guevara](#) launched in July 2014. Customers create a group of trusted friends, with premiums covering members of the private pool. Any unclaimed premiums are used to offset the costs in the following year.

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4. INTERNET OF SHARING THINGS

New connections. New behaviors. New opportunities.



4/10 TRENDS FOR 2015

INTERNET OF SHARING THINGS

Nothing gets trend watchers more excited than when two sexy trends get all amorous (even if most mainstream consumers have hardly heard of either ;)

In 2015, the Internet of Things and the Sharing Economy collide to allow a whole new world of asset sharing: spontaneous, useful, fun, profitable and more.

Last year we urged innovators to put basic human needs at the center of their connected object initiatives. And there have been some exciting [INTERNET OF CARING THINGS](#) innovations, such as Chinese tech giant Baidu's set of [smart chopsticks](#), which can detect the freshness of cooking oil. Now, where next for the Internet of Things?

Enter the INTERNET OF SHARING THINGS. **As more objects become connected, new ways of deriving value from them will become possible for consumers, shared access being one.**

The Collaborative/'[Mesh](#)' economy has long been predicted, but the coming months will see it start to become a consumer reality via the INTERNET OF SHARING THINGS. One signal: currently only 4% of consumers own an in-home IoT device, but nearly two-thirds plan to buy one in the next five years (Acquity Group / Accenture, August 2014).

FEATURED INNOVATIONS: INTERNET OF SHARING THINGS

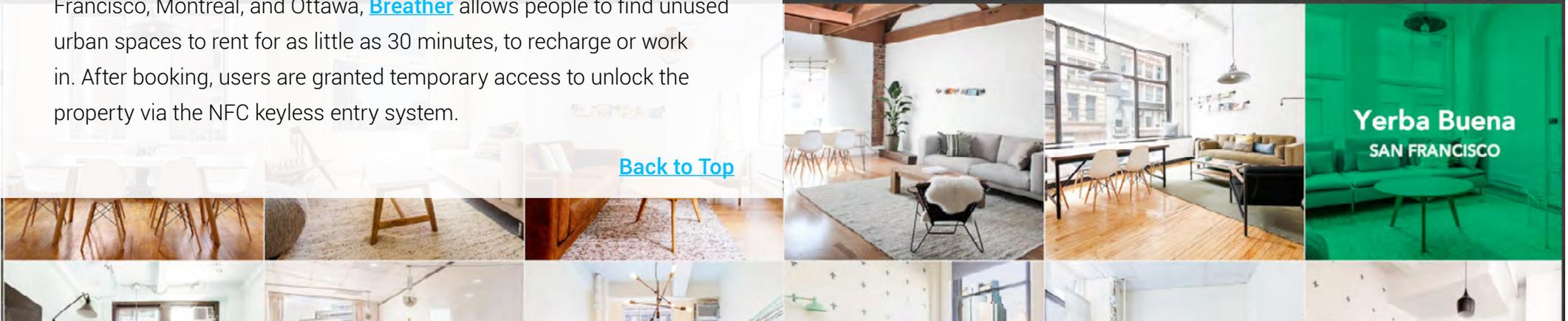
Umbrella Here, BitLock and Breather

The [Audi Unite](#) initiative (in FAIR SPLITTING above) is a great example of the INTERNET OF SHARING THINGS. Three more:

Shipping in January 2015, Hong Kong-based group [Umbrella Here's](#) USD 28 donut-shaped Bluetooth device fixes onto the top of umbrellas. When it rains, owners can use the companion app to signal (via colored LEDs) to nearby strangers they are willing to share their umbrella.

Reaching its Kickstarter funding target during November 2013, the [BitLock](#) smart bike lock verifies a user's identity via Bluetooth when they are nearby; users simply press a button to unlock the bicycle. The BitLock app also enables users to unlock their bicycle remotely and/or share it with others using the app.

Launched in Q4 2013, and now available in four cities – New York, San Francisco, Montreal, and Ottawa, [Breather](#) allows people to find unused urban spaces to rent for as little as 30 minutes, to recharge or work in. After booking, users are granted temporary access to unlock the property via the NFC keyless entry system.



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5. BRANDED GOVERNMENT

Time to get behind corporate-powered civic change.



5/10 TRENDS FOR 2015

BRANDED GOVERNMENT

2015 will be the year for progressive brands to initiate, undertake or support meaningful civic transformation.

Across the globe, consumers know that public authorities are struggling to address many pressing social and economic issues in the face of constrained funding and/or ineffective legacy systems.

In fact, 73% of Millennials don't believe governments can solve today's issues alone, and 83% want businesses to get more involved (MSLGROUP, September 2014).

That's why **in 2015, forward-thinking brands will step up to the challenge of real, meaningful change in the civic arena.** And not just with 'standard' CSR initiatives, but by identifying governmental shortcomings and – either through partnerships or by working directly with the community – effecting real and lasting positive change.

One caveat. If it's just your marketing department driving a BRANDED GOVERNMENT initiative, then may we humbly suggest you re-examine your commitment to your chosen cause. If it feels and looks like a PR stunt, that's probably because it is ;)

FEATURED INNOVATIONS: BRANDED GOVERNMENT

Easy Taxi, Dettol, Volvo and Waze

In response to the Ebola virus spread across West Africa in August 2014, mobile app [Easy Taxi](#) partnered with Dettol to offer Nigerian cab drivers lessons on how to diagnose and prevent the disease, with drivers encouraged to pass their knowledge onto passengers.

In May 2014, Volvo partnered with the Swedish Transport Authority on the [EletriCity project](#) to create roads that can charge electric vehicles. Features will include inductive charging that can wirelessly transmit power to the city of Gothenburg's electric bus fleet.

October 2014 saw traffic data platform Waze announce [Connected Citizens](#): a partnership program exchanging data with governments across the world with the aim of improving urban traffic conditions. The program launch partners included cities such as Los Angeles, Rio de Janeiro, Barcelona and Tel Aviv.



W10

WAZE CONNECTED CITIZENS

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The Waze logo, featuring a smiley face with a car wheel and the word "waze" in lowercase letters.

6. POST-DEMOGRAPHIC CONSUMERISM

Demographics are dead! Long live demographics!



6/10 TRENDS FOR 2015

POST-DEMOGRAPHIC CONSUMERISM

Why it's time to throw out the traditional (and tired) demographic models of consumer behavior!

This list is (almost) totally focused on innovation opportunities for today. But for those who want a BIG idea to wrestle with, then our November 2014 Trend Briefing is one to respond to in not just the months but years ahead!

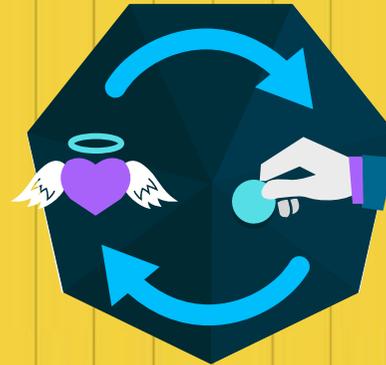
The 2 minute recap: people – of all ages and in many markets – are constructing their own identities more freely than ever. As a result, **consumption patterns are no longer defined by 'traditional' demographic segments such as age, gender, location, income, family status and more.**

Yes, younger, affluent consumers are still (usually) the earliest adopters of innovations. But now successful products, services and brands will transcend their initial demographics almost instantaneously. The takeaway? Never stop scanning all demographics for relevant new innovations.

[Read the full Trend Briefing, including four strategies – with examples – on how to thrive in a POST-DEMOGRAPHIC world, here »](#)

7. CURRENCIES OF CHANGE

Because good behavior should no longer (just) be its own reward!



7/10 TRENDS FOR 2015

CURRENCIES OF CHANGE

In search of wellness, strength, new skills, knowledge and more, 2015's consumers will embrace device-fueled rewards that incentivize improving behaviours.

The impulse towards self-improvement is deep-rooted, but too often there's a chasm between aspiration and reality.

Set that chasm against the fact that 66% of consumers feel that the value exchange between consumers and brands is one-sided. Meanwhile, 70% feel that brands are motivated by a self-centered desire to increase profits rather than by a sincere commitment to their customers (Edelman, October 2014).

In 2015, smart brands will look to flip that picture.

Here's one approach, **build your inevitable 'what to do with wearables in 2015' discussion around how wearable devices (and smartphones) can enable your customers to earn CURRENCIES OF CHANGE:** personalised rewards*, incentives and discounts that help them overcome the inconvenience, cost or just the oh-so-human inertia that so often prevents self-improvement.

** Either for consumers themselves, or for a cause they believe in.*

FEATURED INNOVATIONS: CURRENCIES OF CHANGE

Alfa-Bank, Foodtweeks and Fietsmodus

In June 2014, Russian bank [Alfa-Bank](#) launched a special account that rewards customers for taking physical exercise. Users connect their fitness tracker to the service, and for every step taken, funds from their existing account are transferred into the savings account, which pays a higher rate of interest than normally available.

[Foodtweeks](#) helps people looking to decrease their calorie intake. Users tell the app what they're about to eat and receive tips to reduce the dish's calorie content. If the user says they followed the advice, Foodtweeks then makes a donation of the equivalent number of calories to a local food bank. In November 2014, the service had partnered with 55 food banks in the US.

We've also seen a number of anti-phone CURRENCIES OF CHANGE initiatives, from the [UNICEF Tap Project](#) to the [McDonalds' BFF Timeout](#) in the Philippines. One more: [Fietsmodus](#) (meaning 'Bike Mode') encourages people to avoid using their cellphones while cycling. Launched by the Dutch government in September 2014, activating the app while cycling earns points which can be used for the chance to win prizes.



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8. SYMPATHETIC PRICING

Pain point-targeting discounts.



8/10 TRENDS FOR 2015

SYMPATHETIC PRICING

Get ready for a wave of imaginative discounts that relieve lifestyle pain points or offer a helping hand in difficult times.

We've seen above that consumers will embrace rewards for good behavior. And how brands can step in and provide essential public services. Now one more totally practical way to prove that you 'get it' *and* are willing to put your money where your mouth is: SYMPATHETIC PRICING.

Our full [SYMPATHETIC PRICING](#) Trend Briefing back in June 2014 looked at how and why consumers will embrace helpful, compassionate discounts and deals that support a shared cause or alleviate personal pain points. And the examples just keep rolling in...

Why? Because when **only 30% of global consumers think brands make a sincere commitment towards their customers** (Edelman, October 2014), addressing an eternal consumer concern (price) *and* linking this to a personal or meaningful cause, is a super-powerful way for brands to show they care.

So start brainstorming: how (and where) will you implement a SYMPATHETIC PRICING strategy in 2015?

FEATURED INNOVATIONS: SYMPATHETIC PRICING

South China Morning Post, PareUp and Lote 42

In September 2014, Hong Kong newspaper the [South China Morning Post](#) removed its paywall to give readers free access to the paper's Occupy Central articles.

Launched in May 2014, [PareUp](#) allows New York-based restaurants, coffee shops and grocery stores to offer soon-to-be-wasted food at a discounted price. Participating merchants can send alerts to users detailing what is available, and the discounted price.

During the FIFA World Cup in July 2014, Brazilian publisher [Lote 42](#) offered customers a 10% discount for every goal scored against the national team during the soccer championship. After Brazil lost 7-1 to Germany, customers were offered a 70% discount for 24 hours, catapulting the brand to national attention.

Morning Post 南華早報



O Brasil fez um gol?

CELEBRE!

O Brasil levou um gol?

NÃO FIQUE TRISTE!

A Lote 42 vai dar **10% DE DESCONTO**
para cada gol que nossa seleção sofrer no jogo

[Back to Top](#) O Brasil fez um gol?

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para cada gol que nossa seleção sofrer no jogo

BRASIL X ALEMANHA, NESTA TERÇA (08).

Não leve frango! A promoção vale por 24 horas depois do jogo final.

O Brasil fez um gol?

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2 Trend Framework



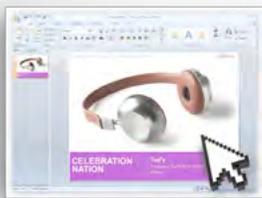
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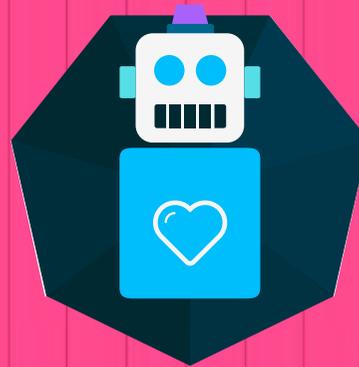
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9. ROBOLOVE

2015: Rise of the Robots



9/10 TRENDS FOR 2015

ROBOLOVE

Forget the dystopian nightmares and/or the sci-fi fantasies: many consumers will have their first face-to-face encounters with robots in 2015. And they'll enjoy them.

Jeff Bezos recently told shareholders that Amazon would have 10,000 Kiva robots by the end of 2014 (from just 1,400 in 2013), and that this could cut fulfillment costs for an average order by 20-40% (BCG, August 2014).

And while lower costs will be central to the robot narrative told in boardrooms during 2015, **smart business will be planning not just how robots might decrease *their* costs, but how they can also increase customer *satisfaction*, too.**

Draw inspiration from the examples below around how to use robots to initiate better customer service: more reliable, faster, richer, more personal, more convenient ... the list goes on.

Remember, this isn't about Man vs. Machine. ROBOLOVE will free your (human) employees from the most repetitive parts of their roles, and free them to focus on the more engaging, valuable tasks (that will further increase *their* satisfaction, and so ultimately that of your customers too).

FEATURED INNOVATIONS: ROBOLOVE

Düsseldorf Airport, Lowe's and Nestlé Japan

In July 2014, [Düsseldorf Airport](#) unveiled the world's first robotic parking valet. Customers leave their car, and a robot picks it up and positions the vehicle in one of 249 dedicated spaces. The system connects to the airport's flight database, meaning that customers find their vehicle ready and waiting for them upon their return.

November 2014 saw US hardware retailer [Lowe's](#) trialling OSHbot robot sales assistants in a California store. The robots have a 3D scanner to identify items bought in by customers and check if replacement parts are in stock. They are also programmed to speak English and Spanish, with further language options planned.

In Japan, Nestlé are trialling a robotic customer service assistant named [Pepper](#) to help guide people through the Dolce Gusto and Gold Blend coffee brand product ranges. Trials start in December 2014, with plans to roll the robots out to 1,000 stores by the end of 2015.



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10. BRAND STANDS

Get off the fence!



10/10 TRENDS FOR 2015

BRAND STANDS

In 2015, winning brands will *start* contentious, painful and necessary conversations.

Watch (almost all) brands closely, and you'd be forgiven for thinking it was their mission to be as anodyne as possible.

Two reasons why in 2015, that strategy couldn't be more misguided.

First, when consumers are surrounded by an ocean of branded content, constantly occupying neutral ground means a slow drift into obscurity.

Second, many consumers believe brands should speak out:

- 73% of Millennials believe that businesses should share a point of view about issues;
- 73% also think businesses should influence others to get involved in an issue.

(MSLGroup, February 2014)

In October 2014 we looked at how in 2015 daring brands will make real, tangible BRAND SACRIFICES for people, society and the planet. But if your CEO/client isn't ready for that? At least take a BRAND STAND on something that matters to consumers.

FEATURED INNOVATIONS: BRAND STANDS

Glamour Poland, Nando's and Pantene India

Launched in Poland in July 2014, [Nie hejtuje](#) ('I don't give hates') is an online community that highlights the negative effects of cyberbullying and trolling. Glamour Poland offered a free full-page advertisement to the group and invited the founder to publish an editorial about the 'culture of hate' prevalent online.

September 2014 saw Nando's South Africa launch its [#nobluelights](#) campaign. The spot pokes fun at how security convoys take precedence over 'normal' traffic and imagines what would happen if four such convoys met at the same intersection. The clip has received over 600,000 views and was among YouTube's most watched videos in South Africa.

[Pantene India](#) launched a campaign in August 2014 inviting consumers to point out ridiculous claims made by beauty products that don't work. The brand launched the campaign with a powerful YouTube video (entitled [SHIT Beauty Promises They Make](#)). A Facebook post from a 'Proof Walk' event in October 2014 (a Hair Show featuring celebrities and bloggers), received over 100,000 Likes.

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SHIT
BEAUTY
PROMISES
THEY MAKE

Shampoo to repair split ends



NEXT



NEXT

Over to you!

These trends have given you a fast download of how the consumer landscape will look in 2015. So now – get innovating! Take these insights as the launch-pad for a discussion with your team.

How can you adapt these trends to serve your consumers or clients better in the coming year?



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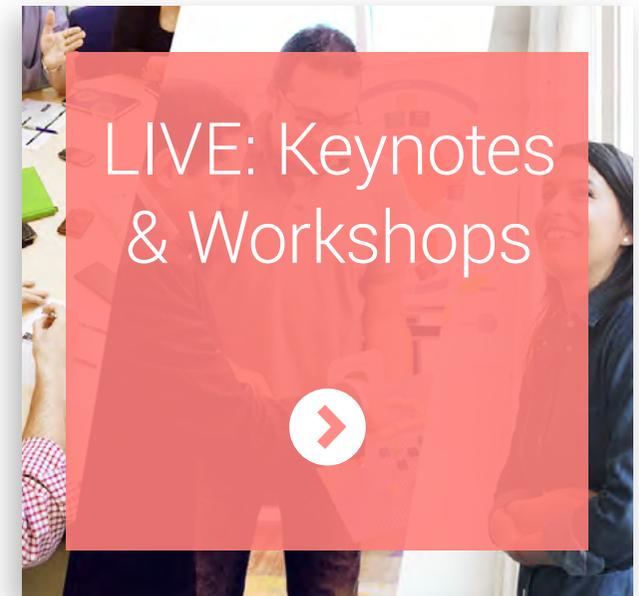
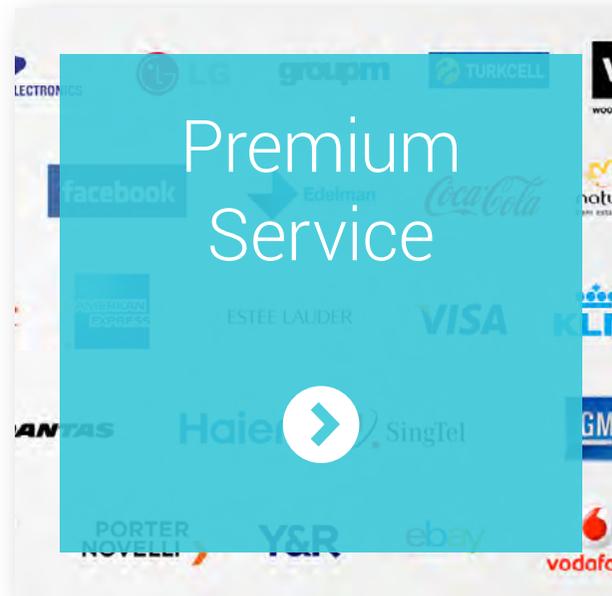
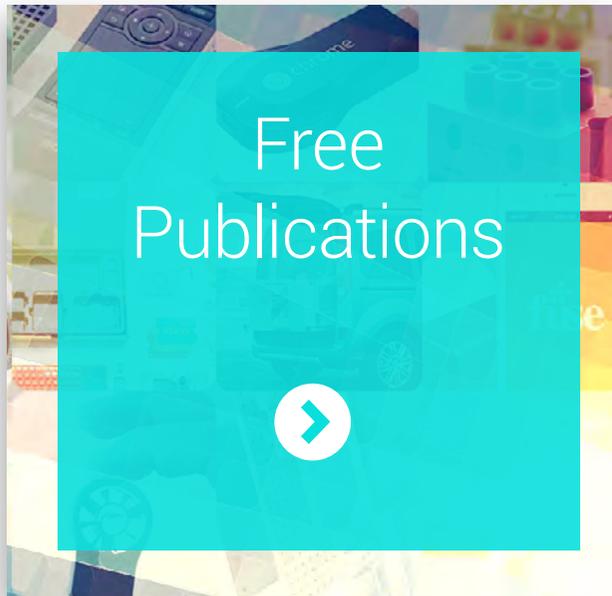


AND FINALLY...

HERE'S TO A SUCCESSFUL 2015!

Cheers! Proost! 干杯! Salud! Skål! 건배! Santé! Prost!
Şerefe! Mabuhay! Saúde! Chok dee!

— *Want more?* —



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PAUL BACKMAN
Chief Client Officer
paul@trendwatching.com

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