

# Navigating the Never Normal

How brands can find direction  
in a world turned upside down





# From New Normal to Never Normal

2008

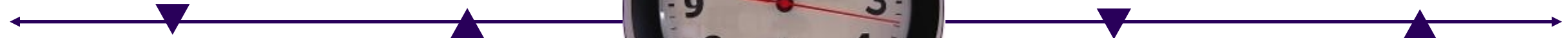


2017





# The Doomsday Clock ticks on...



**2007**  
5 minutes  
to midnight



**2015**  
3 minutes to  
midnight



**2017**  
2.5 minutes  
to midnight



**2023**  
1.5 minutes  
to midnight



**Strategic Foresight**  
is more important  
than ever





# Our Structural Drivers map out the futures



**Environmental  
Challenges**



**Shifting  
Societies**



**Affluence &  
Inequality**



**Health Revolutions  
& Burdens**



**Digital  
Lives**



**Consumer  
Empowerment**



**Globalisation and the  
Multipolar World**

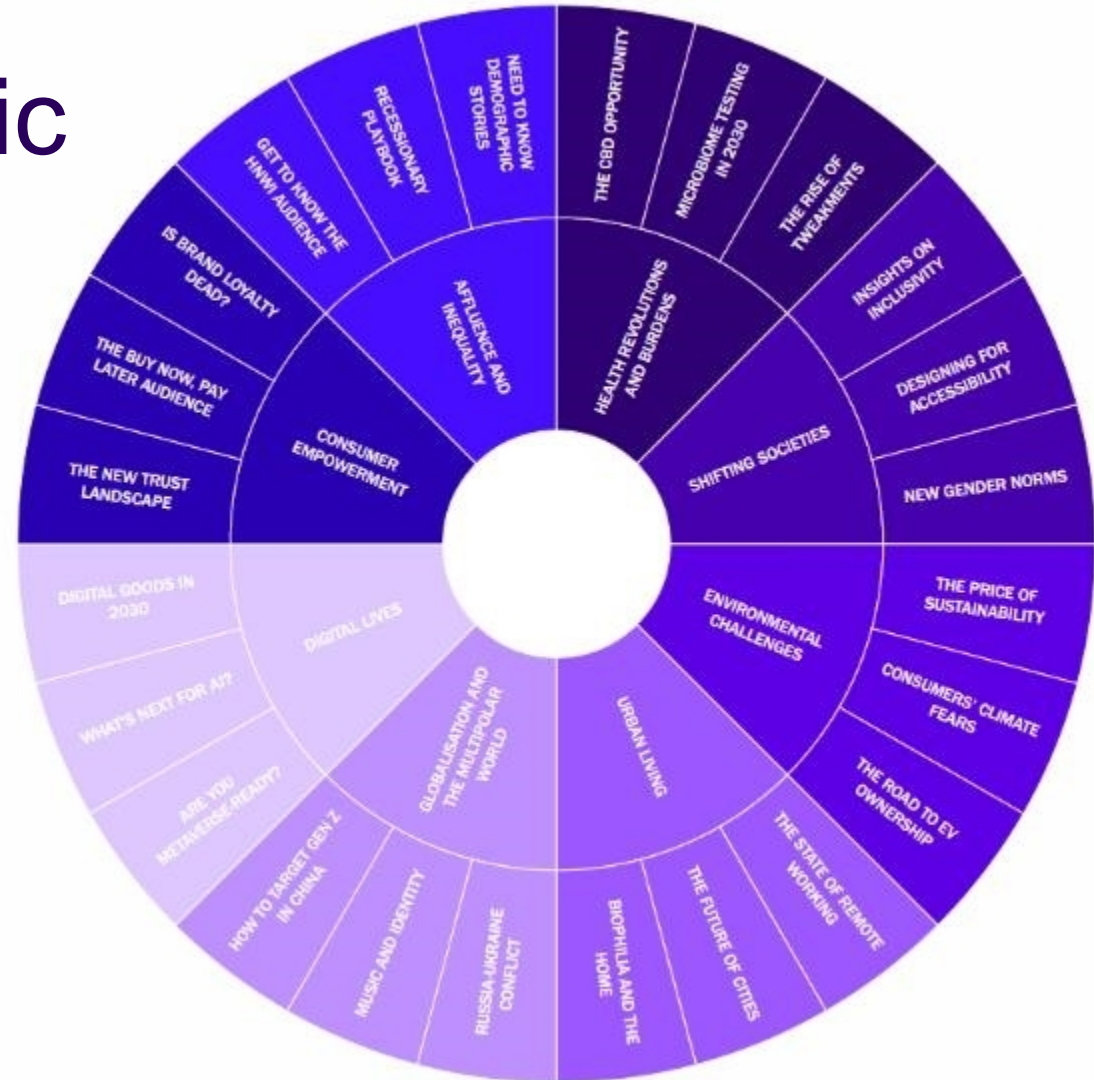


**Urban  
Living**



# Collision: Your strategic foresight partner

Introducing:  
**The Dynamic Trends Framework**



# Navigating the Never Normal



**1. Coping with rising costs**



**2. Powering lives sustainably**



**3. Eating well and staying healthy**



**4. Having fun**



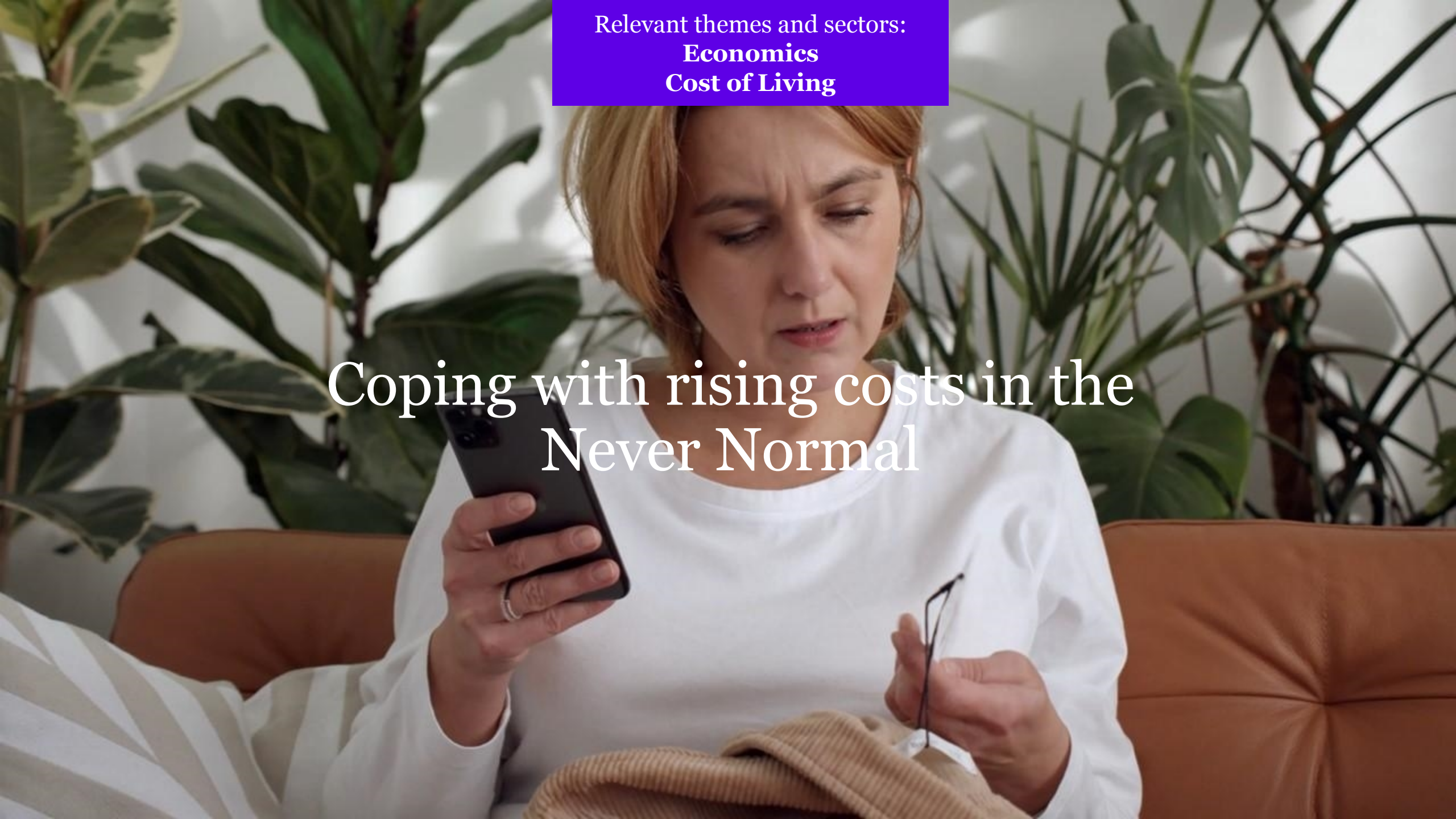
**5. Saving for the future**



**6. Working alongside AI**

Relevant themes and sectors:  
**Economics**  
**Cost of Living**

# Coping with rising costs in the Never Normal

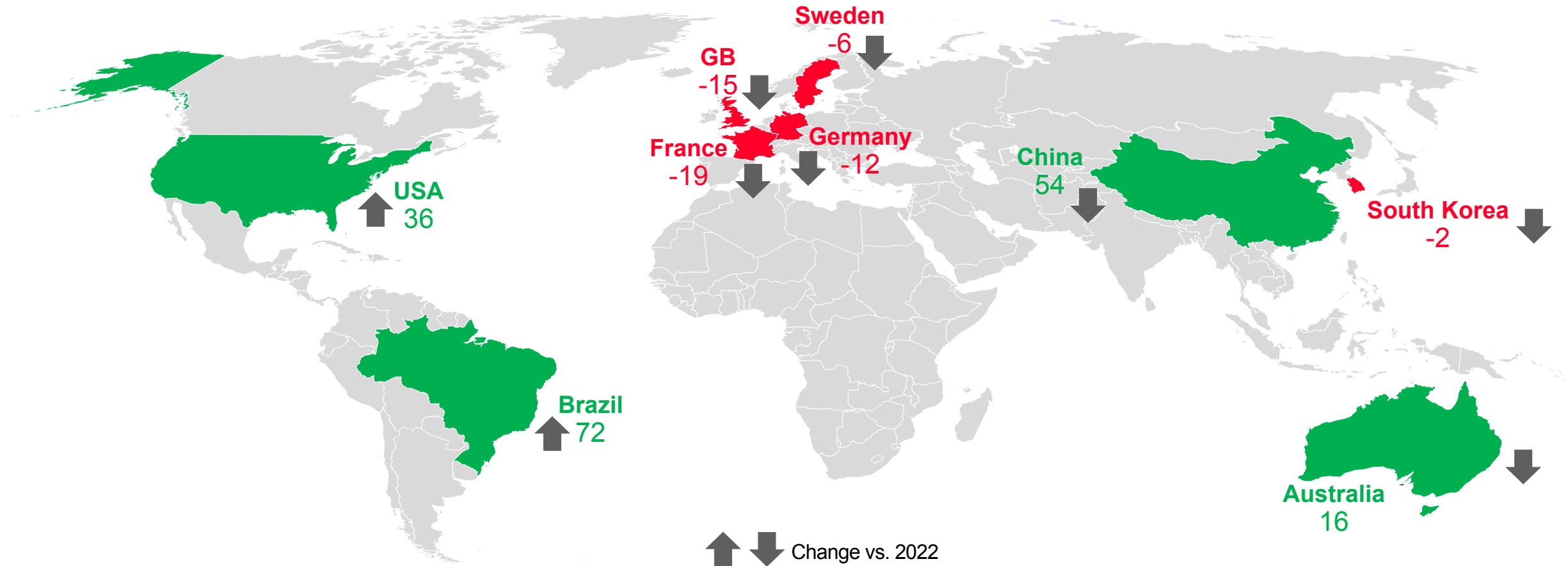






# Mixed feelings about own personal finances in year ahead

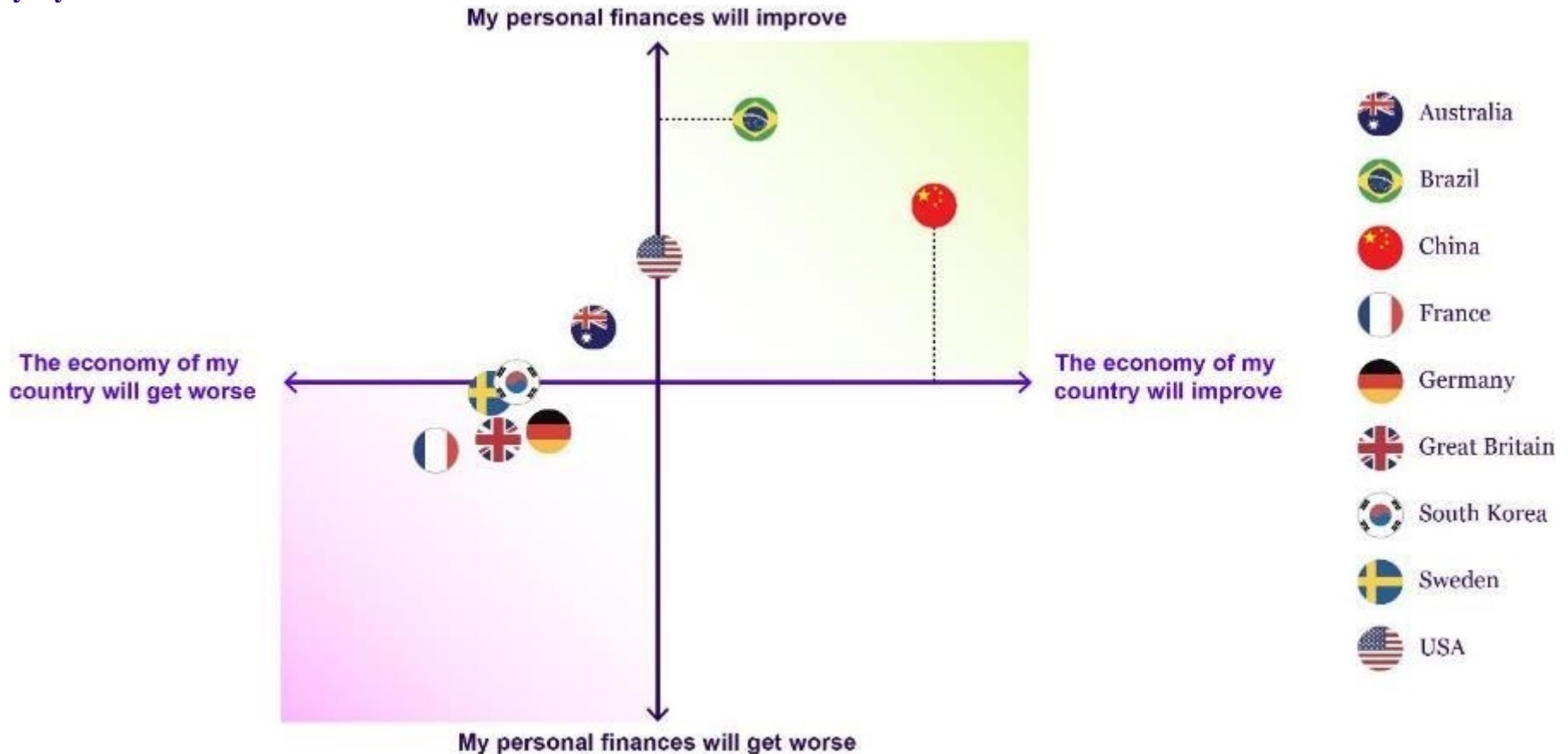
Net score of **own personal finances** over the next 12 months (pp difference between % say will **improve** and % say will **worsen**)





# Economic expectations

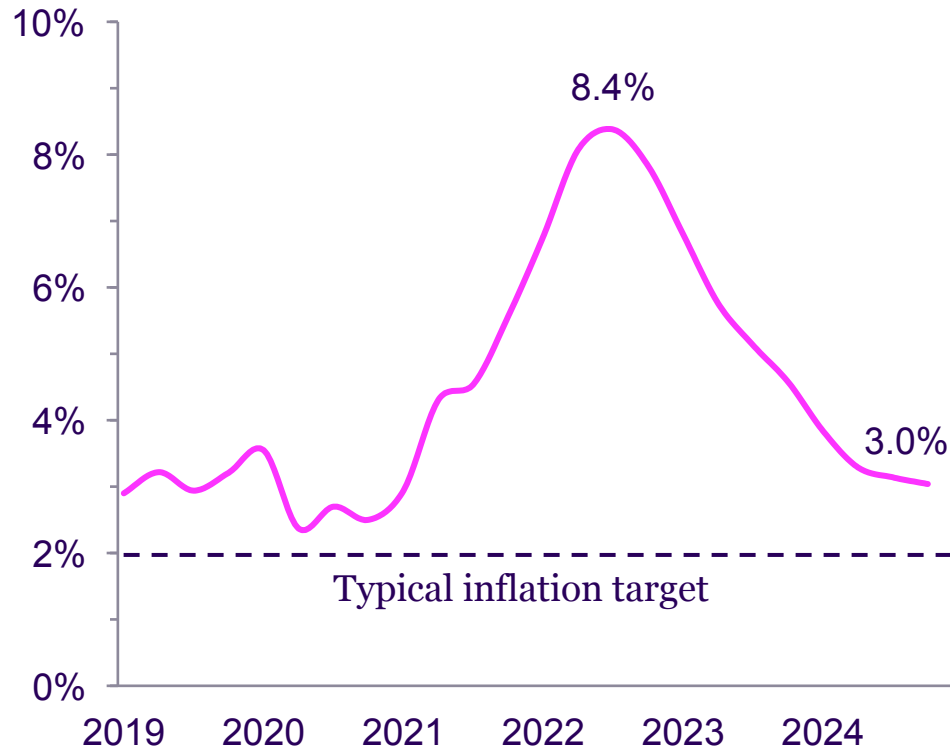
Please say whether you think the following will improve, worsen or stay the same over the next 12 months: Average rating of personal finances and the economy by market



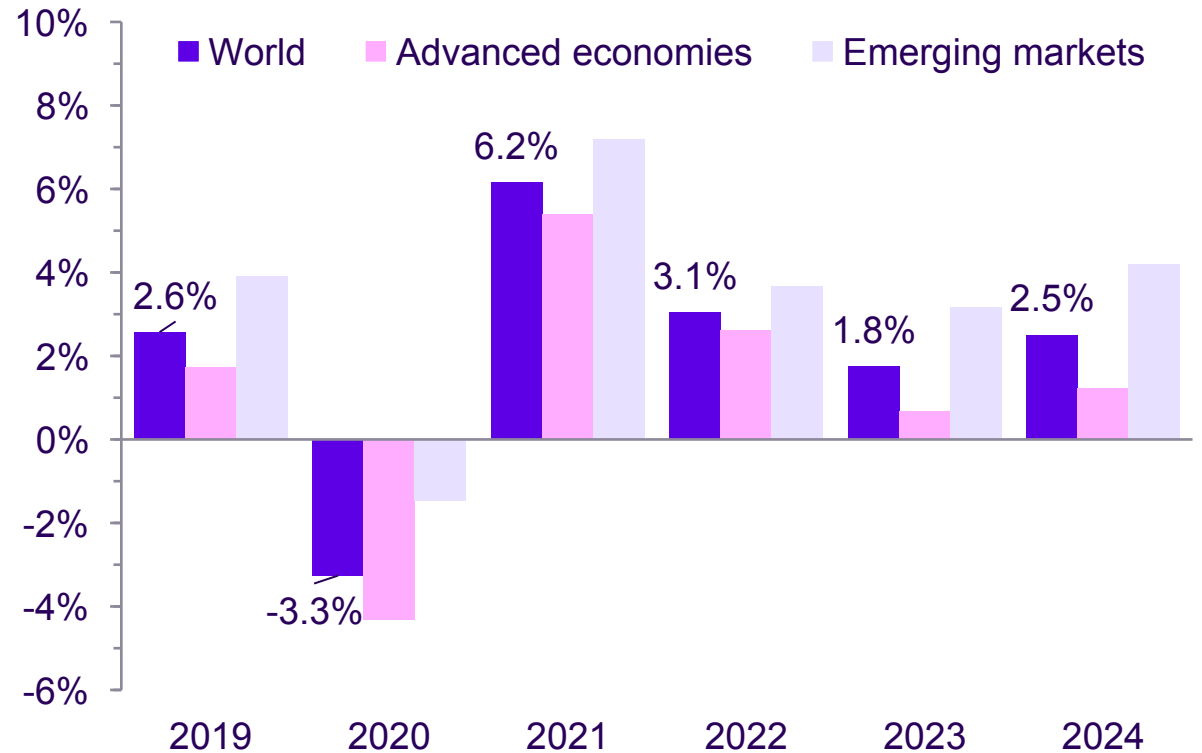


# Inflation and global GDP growth forecasts

Quarterly Global CPI Inflation

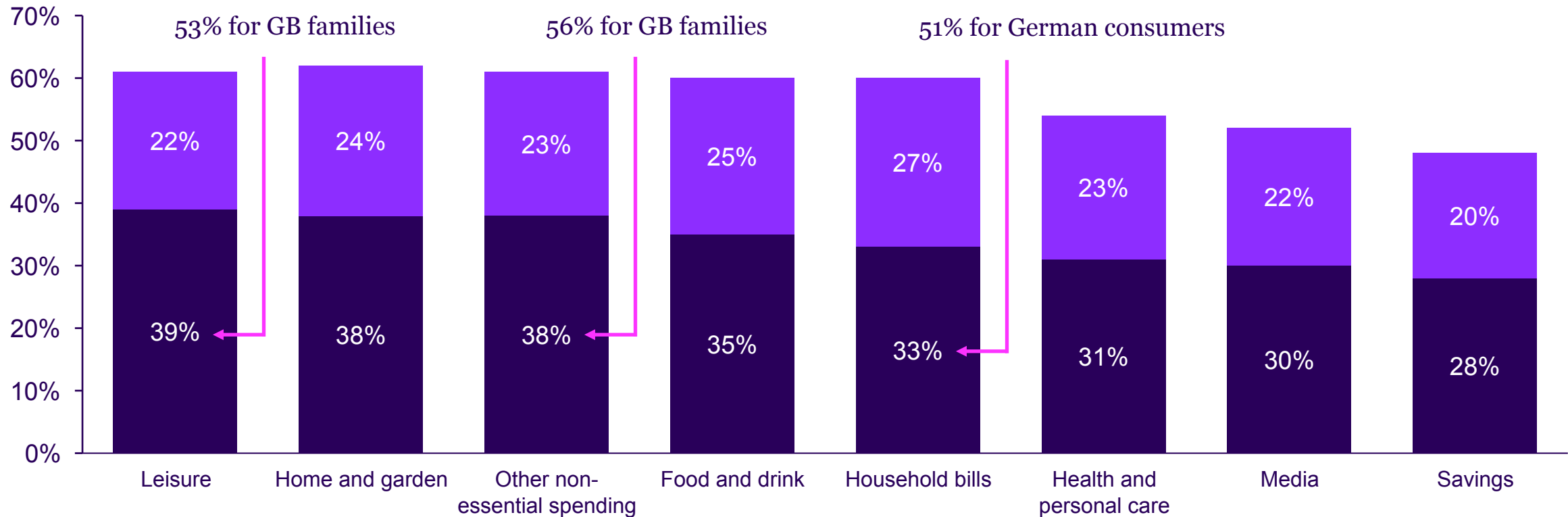


Year on year % change in real GDP globally and within advanced economies and emerging markets | March 2023 forecast





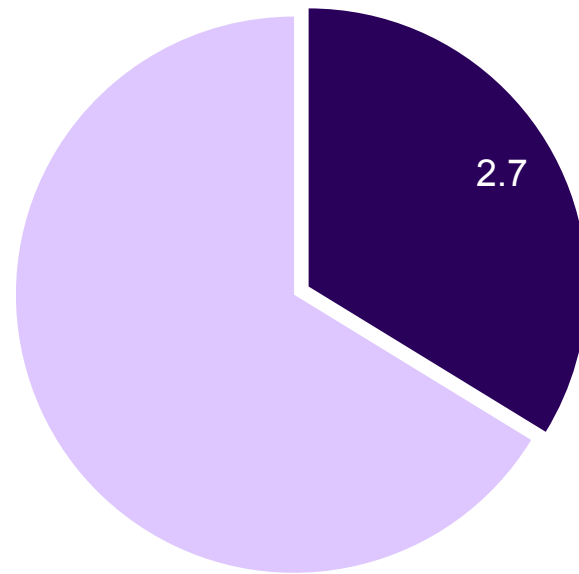
# Which sectors are people cutting back on?



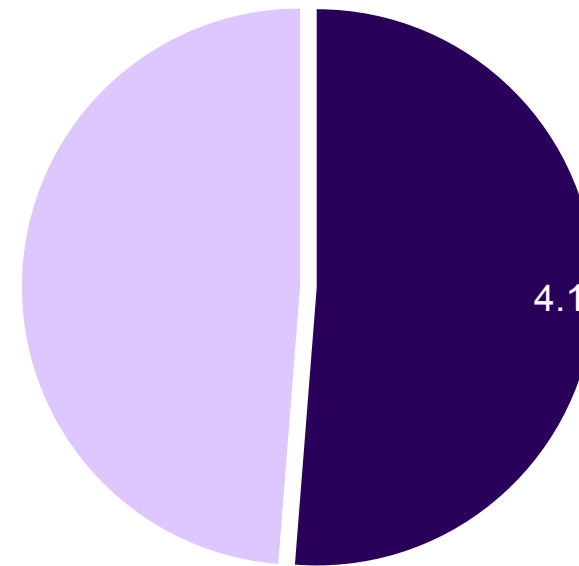


# How many sectors are people cutting back on?

Global average



Those that struggle to afford the essentials





# Across categories, we explored over 70 cutbacks

## Food and drink

- Buying less of my usual groceries
- Buying cheaper groceries
- Buying fewer takeaways
- Switching brands I normally use to other cheaper brands
- Switching supermarket I normally use to another cheaper one
- Buying items in bulk or larger sizes
- Cooking from scratch more
- Buying fewer snacks/treats
- Using food banks/food donations
- Planning meals carefully to meet my budget
- Eating smaller meals
- Eating fewer meals
- Spending my loyalty points
- Using deals or vouchers

## Savings

- Reduce the amount I put into my savings account/s
- Take out savings to spend
- Reduce the amount I put into my investments
- Reduce the amount I put into my pension
- Stop paying into my children's savings

## Household bills

- Use less heating and electricity
- Turn off appliances instead of leaving them on standby
- Use less water
- Reduce car journeys
- Use energy saving cooking methods
- Use appliances such as a washing machine at “off-peak” times
- Switch to cheaper suppliers
- Insulate my home to save energy
- Switch to a pay-as-you go mobile contract

## Leisure

- Just do less of what I normally do
- Do more free things
- Entertain at home instead of going out
- Use deals or vouchers
- Drink alcohol at home instead of in a pub/bar
- Go on holidays in your country instead of abroad
- Spend my loyalty points
- Take day trips instead of overnight stays
- Cancel leisure subscriptions
- Switch to cheaper pubs, bars, restaurants, cafes etc than my usual

## Health and personal care

- Do free exercise
- Use deals or vouchers
- Switch personal care brands I normally use to cheaper brands
- Find cheaper versions of beauty brands I normally use
- Use less of beauty products to make them last longer
- Use less of personal care products to make them last longer
- Do home beauty treatments instead of going to a salon
- Spend my loyalty points
- Cancel gym/fitness subscriptions
- Put off health treatments due to cost
- Do cheaper online fitness classes instead of in-person ones
- Cancel healthcare plans

## Media

- Reduce the number of media subscriptions I use
- Switch to using free-to-use ad supported media
- Read more free newspapers/magazines
- Buy fewer newspapers/magazines
- Use deals or vouchers
- Switch to a cheaper media package

## Home and garden

- Repair some items instead of buying new
- Spend less on small home décor improvements
- Delay big purchases for the home
- Use deals or vouchers
- Buy second hand items
- Delay big home improvements/renovation plans
- Switch to cheaper brands
- Do more D.I.Y home or garden improvements instead of paying for help
- Do D.I.Y home décor projects
- Spend my loyalty points

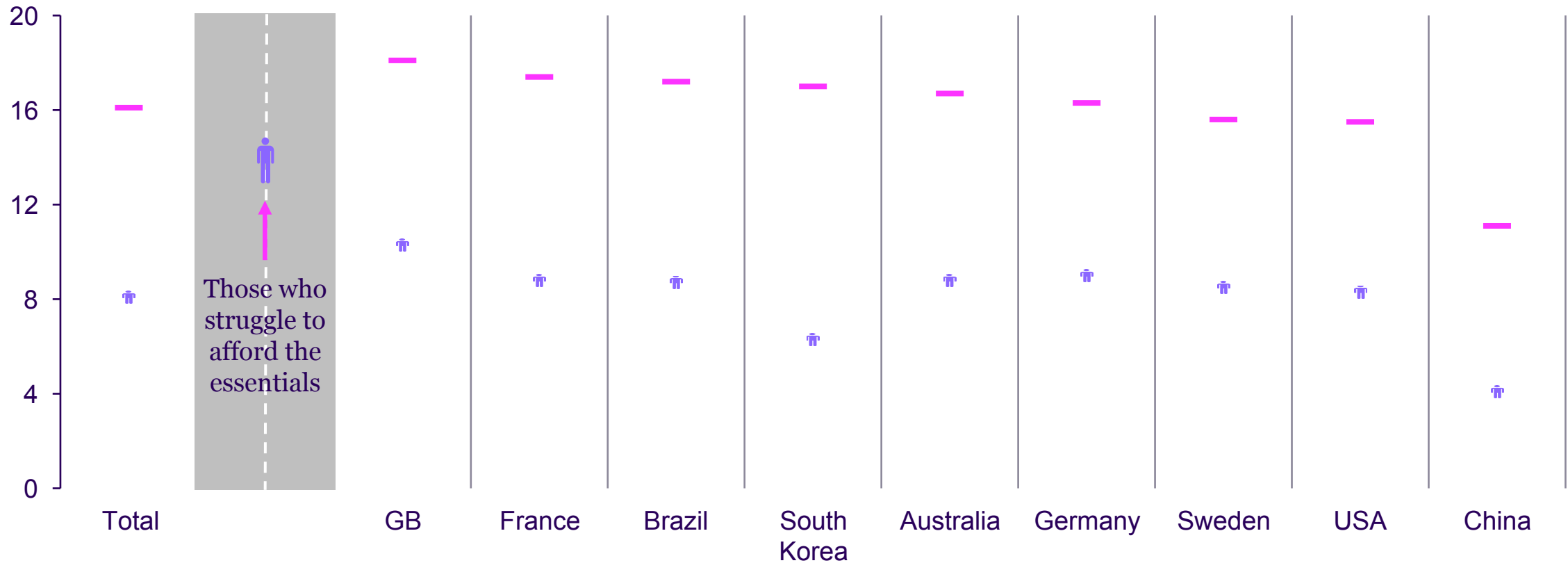
## Discretionary

- Only buy clothes I really need
- Buy fewer treats for myself
- Buy fewer gifts
- Use deals or vouchers
- Spend my loyalty points
- Buy second-hand clothes instead of new
- Switch product brands I normally use to other brands
- Stop playing the lottery
- Cancel regular charity donations
- Gamble with smaller amounts of money



# Are you doing, or planning to do any of the following to cut back even more on your spending in the next 12 months?

Average number of cutbacks done and planned



Relevant themes and sectors:  
**Utilities**  
**Home**  
**Automotive & Mobility**

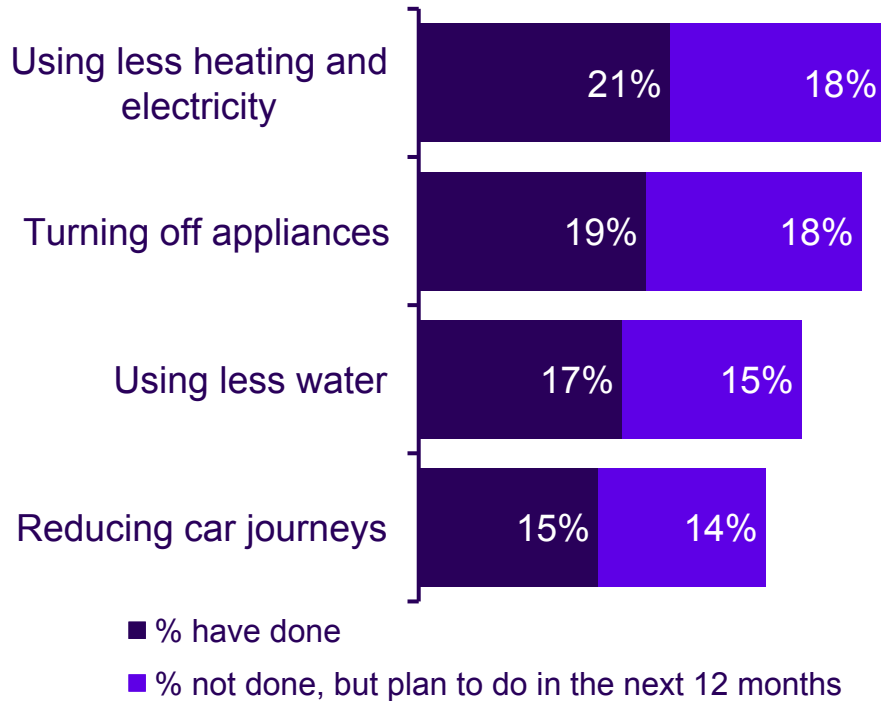
Powering lives sustainably  
in the Never Normal





# Now: Energy shock leads to cutbacks

## Most common cutbacks in household bills



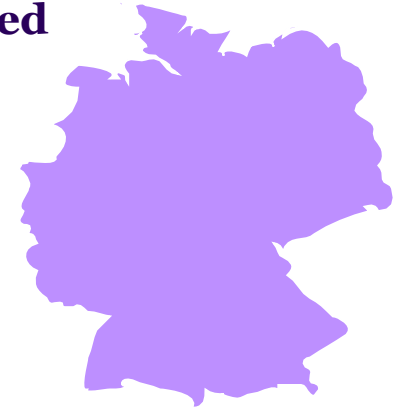
## Germany has been particularly affected

**40%** have used less heating and electricity

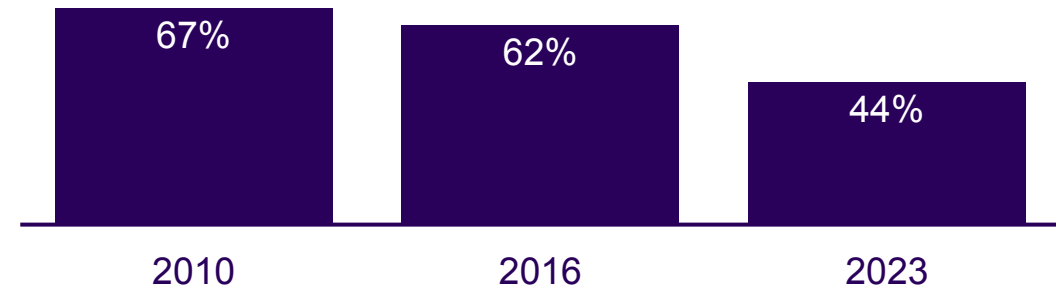
**34%** have used less water

**30%** have turned off appliances

**25%** have reduced car journeys



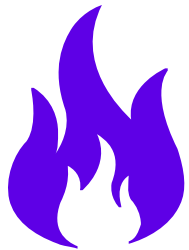
% in Germany who agree today's children will enjoy greater prosperity than themselves



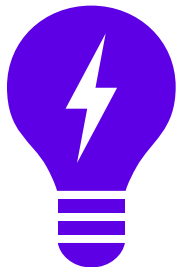


# Now: Energy-saving hacks are appreciated

Household energy price increases in Europe (22-country average) 2021-22



**Gas: 214%**  
(559% in Estonia)



**Electricity: 114%** (323% in Estonia)

Source: GreenMatch. Note: Average does not include UK

Air-fryers saw a surge in popularity, with a 3,000% growth in demand between 2021 and 2022

Source: PriceRunner



Brands such as **Barilla** encourage more energy-efficient methods of cooking, such as **passive cooking**, where the heat is turned off once the water is boiling



# Next: Structural factors to consider



## Globalisation and Multipolar World

How will geopolitical tensions develop around the world?



Geopolitical confrontation is the third-biggest risk factor in the next two years

Source: WEF



## Environmental Challenges

How will net zero clash with industries?



\$3.5 trillion more a year on infrastructure needed to reach net zero

Source: McKinsey



## Urban Living

How can expanding cities decarbonise and adapt to climate change?



By 2030, 90% of Portland residents should be able to easily walk or bicycle to meet all basic daily, non-work needs

Source: Portland's Climate Action Plan



# Next: Bumpy road to net zero

Protests and legal challenges for  
Low Emissions Zones



Impressions of car sharing services

**24%**  
“They are  
cheaper than  
buying a car”



**20%**  
“They are too  
expensive”



Which of these statements do you think  
apply to car sharing/renting services?  
**% globally selected**

Source: Foresight Factory, 16+, 2023

Innovative tech could help solve  
energy shortages





# Helping consumers power their lives sustainably in the Never Normal

## How to act

Now: Provide innovative ways to drive **everyday energy efficiency**.

Next:

Be an **educator brand** that helps consumers **navigate the journey towards Net Zero**.

Help consumers in **Building Resilience** by getting involved in **decentralised energy** grids, for instance.

Provide a **range of mobility solutions** that offer a similar level of **convenience** to a private car.



Relevant themes and sectors:

**Food**

**FMCG**

**Health & Wellness**

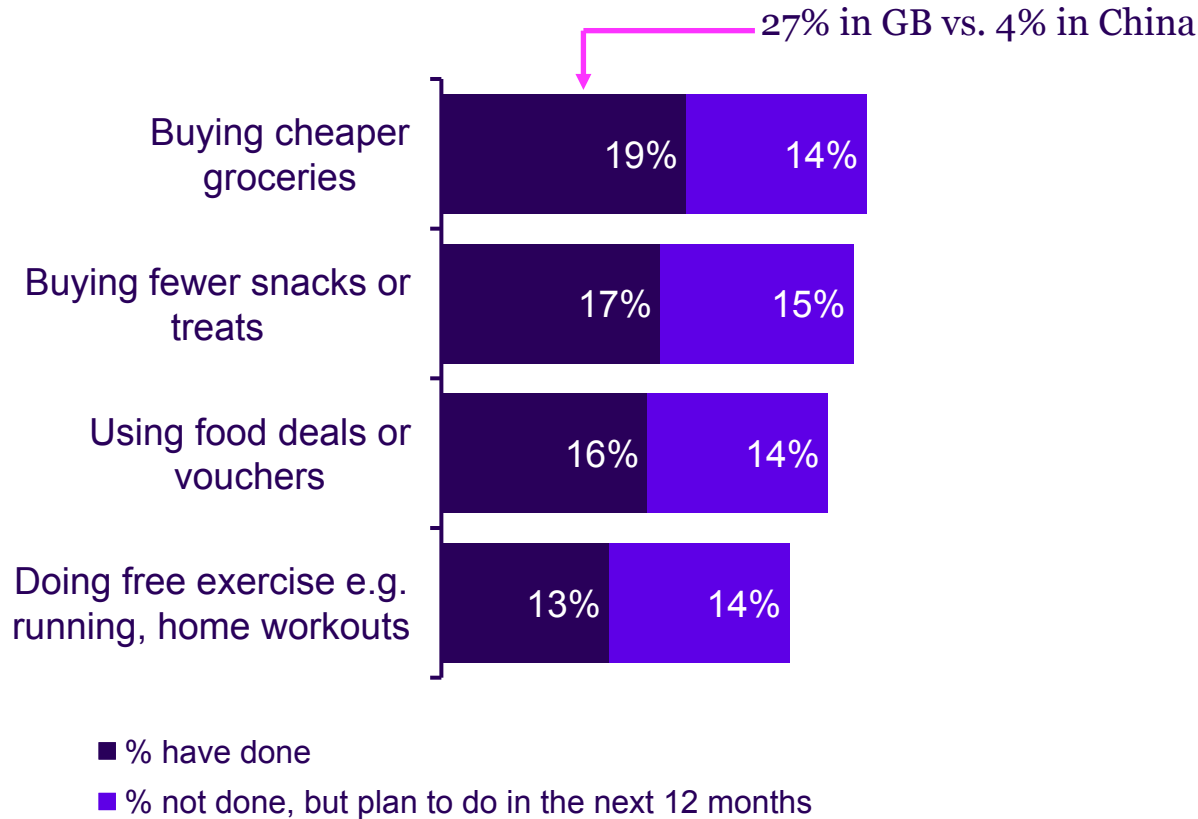
**Sustainability**

**Eating well and staying  
healthy in the Never Normal**

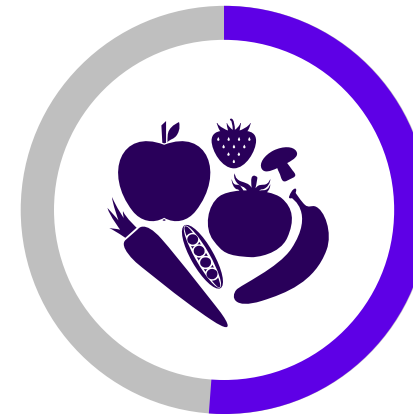


# Now: Trading down, finding deals and forgoing treats

## Most common food and health cutbacks



Source: Foresight Factory, 16+, 2023



# 51%

% globally who say that **healthiness is something they look for in the meals and snacks they eat**

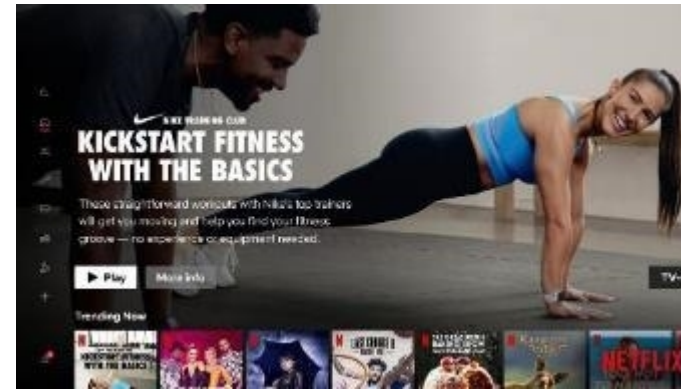
Source: Foresight Factory, 16+, 2023



# Now: Elevating pantry staples amid high inflation



**Fancy ice** brings the glamour of the cocktail bar into the home



**Nike Training Club** offers remote workouts for **Netflix** streamers



The **TikTok** trend **#tinfishdatenight** is all about jazzing up recession-era meals



**Mara** makes wholesale groceries accessible to lower-income shoppers in Brazil





# Next: Structural factors to consider



## Health Revolutions and Burdens

How can we manage ageing populations and chronic health crises?



By 2050, almost **16% globally may be obese** and **1.6 billion people will be aged 65+**

Sources: Potsdam Institute for Climate Impact Research, WHO



## Affluence and Inequality

How can we ensure that everyone has access to resources and life-saving innovation?



By 2050, the **top 1% income share will increase to 24%**, while the bottom 50% share will fall below 9%

Source: Federal Reserve



## Environmental Challenges

How can we feed 10 billion people in a healthy and sustainable way?



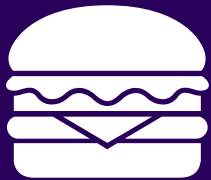
By 2050, **agricultural demand will grow by around 50%**

Source: UN



# Next: The need to increase accessibility

Projected retail price of a  
0.14kg cell-cultured  
hamburger:



\$18

Source: Journal of Agriculture and Food  
Research, 2022

Net agree

26%

Net disagree

45%

% globally who agree they would be  
**happy to eat GMO (genetically  
modified) foods**

Source: Foresight Factory, 16+, 2023



Appetite suppressants  
like **Ozempic** gain  
new traction among  
the elite



DNA testing as seen in  
**Limitless Chris  
Hemsworth** could  
transform preventative  
health



# Helping consumers eat well and stay healthy in the Never Normal

## How to act

**Now:** Clearly indicate how your products deliver more **nutrients per dollar**.

**Next:** Help consumers overcome cost and perception barriers to **embracing lab-grown foods**.

Ensure **less affluent consumers aren't priced out** of health innovation.

Invest in **regenerative farming** to cut emissions and improve biodiversity.

# Navigating the Never Normal

## Dynamic Trends Framework



# Hi Webinar

Act on the latest consumer behaviors and attitudes to answer your critical business challenges.

Latest content

Trend Framework

Filter by [Choose an audience...](#) ▾ in [Choose a market...](#) ▾ for [Choose an Opportunity status...](#) ▾ and [Choose a Category...](#) ▾



A person is skateboarding on a grey concrete ramp in an urban park. The person is wearing dark blue jeans and white sneakers. In the background, there is a large, multi-story building with many windows. A red car is parked on the street to the right. The scene is captured in a slightly blurred, dynamic shot.

Relevant themes and sectors:

**Leisure**  
**Retail**  
**Travel**  
**Indulgence**

Having fun in the  
Never Normal



# Now: Buying essentials and staying in

## Most common cutbacks across leisure and discretionary spending



Source: Foresight Factory, 16+, 2023



Only 10% have chosen a staycation instead of going abroad.

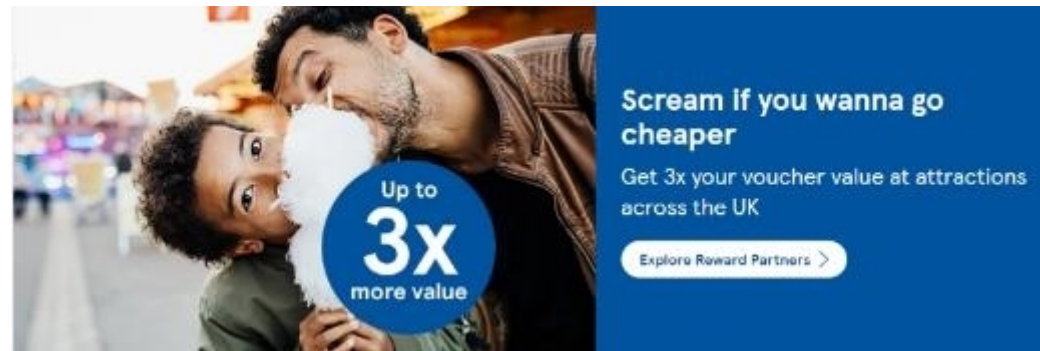
Only 9% have bought second-hand clothes instead of new.





# Now: The best things in life are free

Tesco lets its Clubcard members redeem points against discounted days out



AR art exhibition in Zagreb allows anyone to enjoy a gallery experience by downloading an app



Stealing is one way of getting more for free, and TikTok trends suggest it could be losing its stigma among some consumers



# Next: Structural factors to consider



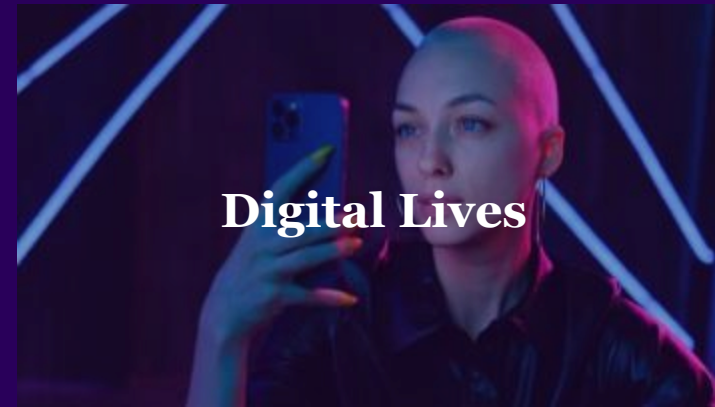
## Environmental Challenges

How can we decarbonise the travel sector to meet net-zero targets?



For the aviation sector to reach net-zero by 2050, it will require **an average annual investment of \$175 billion**

Source: MPP/CST



## Digital Lives

Could virtual fun supplant IRL leisure and play?



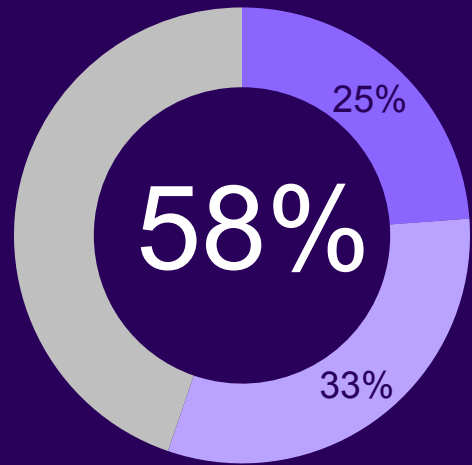
By 2030, 25% of global consumers will own or have access to a **VR headset**

Source: Foresight Factory, 2022





# Next: The move toward sustainable leisure



■ Have done

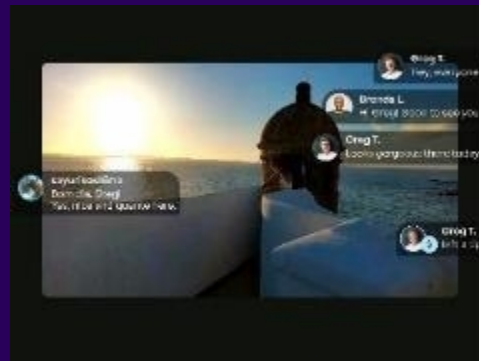
% who have chosen an alternative means of transport to **avoid flying for environmental reasons**



France's **ban on short-haul flights** becomes official



**Last chance tourism** poses further threats to at-risk destinations



**Heygo** offers travel livestreams for virtual tourists



The **New Murabba** in Riyadh uses XR to augment an IRL destination



# Helping consumers have fun in the Never Normal

## How to act

**Now:** Identify **free ways** in which consumers can **engage with your brand**, especially as a **gateway to future spend**.

**Next:**

Strive to ensure that **second-hand does not seem like second-best**. The same goes for access-over-ownership.

Consider how **guilt-free indulgence** must evolve to cover aspects including health, cost, environmental impact and more.

Consider opportunities in **virtual worlds** to provide consumers with **inexpensive and sustainable indulgences**.

A person with long hair, wearing a white long-sleeved shirt and a silver bracelet, is sitting on a brown leather sofa. They are holding and counting a stack of US dollar bills. To their right, a silver laptop is open on the sofa. The background is slightly blurred, showing a green folder or book on the sofa.

Relevant themes and sectors:

**Banking**

**Insurance**

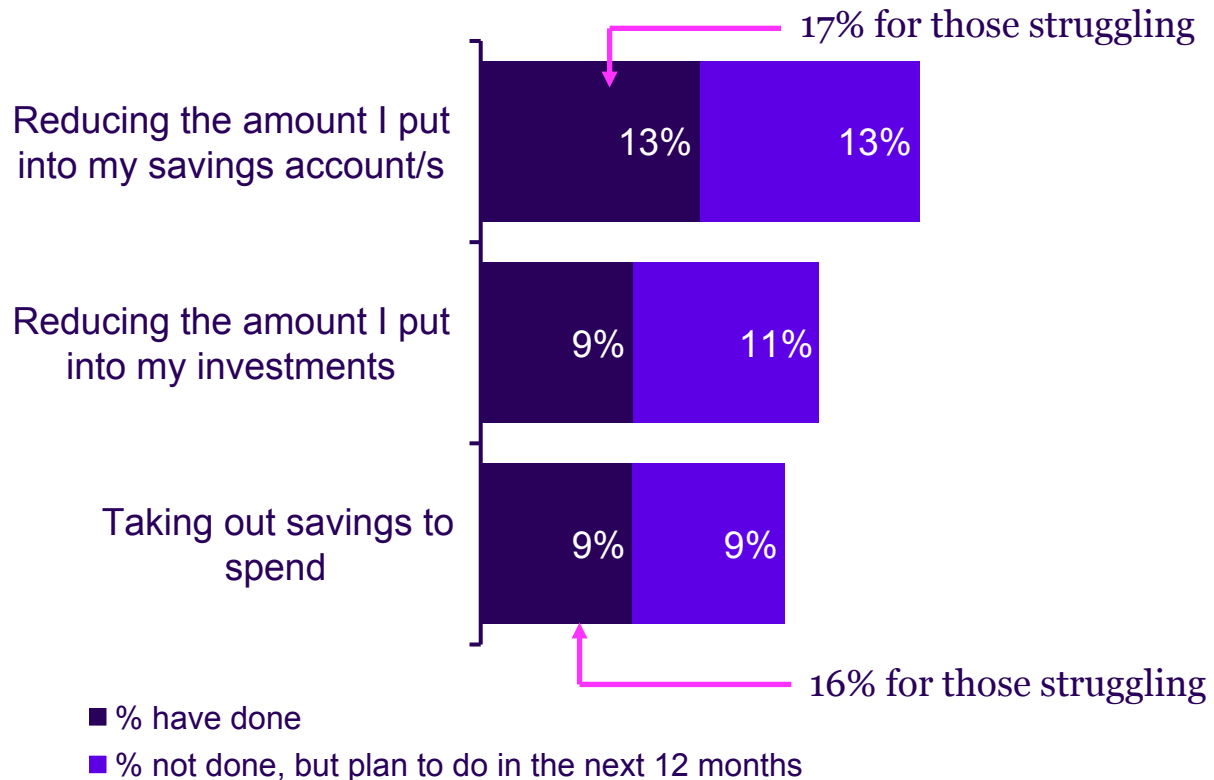
**Personal Finance**

Saving for the future  
in the **Never Normal**



# Now: Less saving, more reliance on BNPL

## Most common cutbacks across spending for savings



Those who've cut back on savings

Millennials

35%

Total

45%

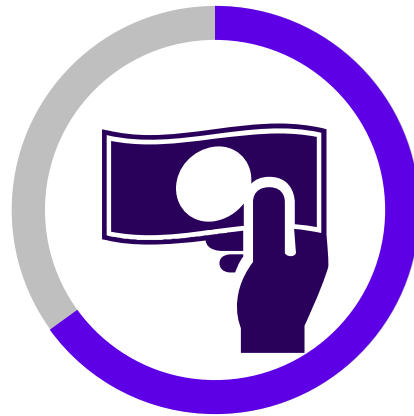
39%

% who **have used** BNPL services when buying online or in-store



# Now: Cashstuffing and other hacks to the fore

#cashstuffing has almost 1 billion views on **TikTok**



# 64%

% of US Gen Z who say they try to have as much fun as they can now and **let the future take care of itself**

Source: Foresight Factory, 2022

Social media users justify ongoing spending in the face of economic gloom



**Terrill Fischer**  
@Terrillific

I tried to save money by cutting back on my vices. But then I realized, without my vices, life is just one long, boring, miserable existence.

9:39 PM · Mar 10, 2023 · 26 Views



**Lulu Simmons**  
@missLuluSimmons

The news: this is a recession, save your money.

Me: \*books a hair appointment\*

4:15 PM · Jun 21, 2022

48 Retweets 1 Quote Tweet 104 Likes



# Next: Structural factors to consider



How can we help an ageing population stay financially resilient throughout their long lives?



By 2050, 80% of older people will be in low- and middle-income countries

Source: WHO



How can we close the gap between the richest and poorest swathes of society?



54% globally agree that people today should be angrier about inequality in society than they are

Source: Foresight Factory, 16+, 2023



# Next: Making building resilience easier



Universal basic income programmes are being introduced or trialled around the world



Smart money app Plum's Naughty Rule automatically set aside money for savings when users spend on guilty pleasures



58%

% globally who are interested in an AI investment service

Source: Foresight Factory, 16-64, 2022



# Helping consumers save for the future in the Never Normal

## How to act

**Now:** Find ways to help consumers **maintain the saving habit** in times of difficulty, even in small amounts.

**Next:** Decide as a brand whether to **support or warn against** the **live now, pay later** approach – or both.

Consider what you can do to **help the less-well-off prepare** for their future, in a world of Naked Citizens.

Can you be a brand that has your customer's back, **not just in the short term**, but for their whole life?



Relevant themes and sectors:

**Work**

**AI**

**Health & Wellness**

**Consumer Tech**

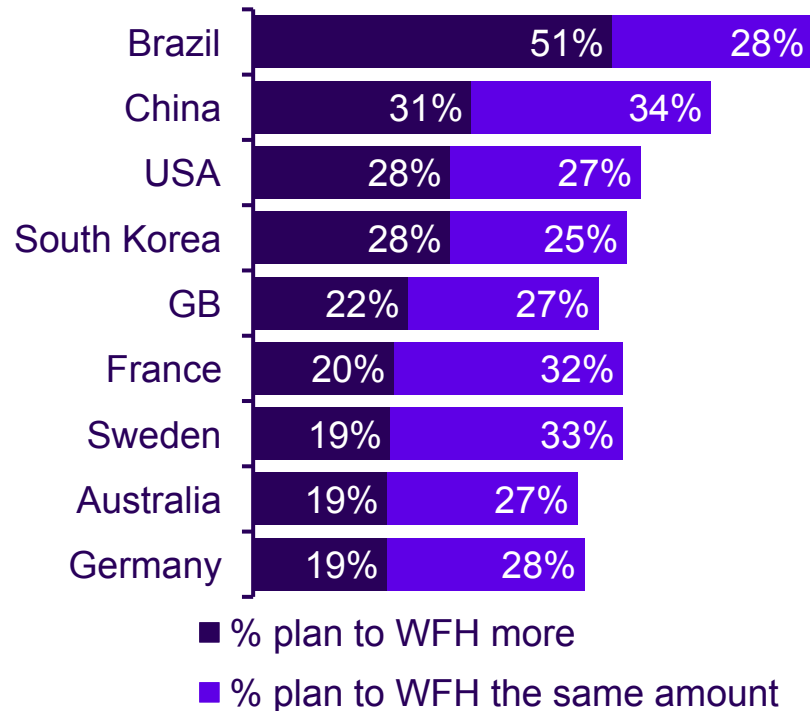
# Working alongside AI in the Never-Normal



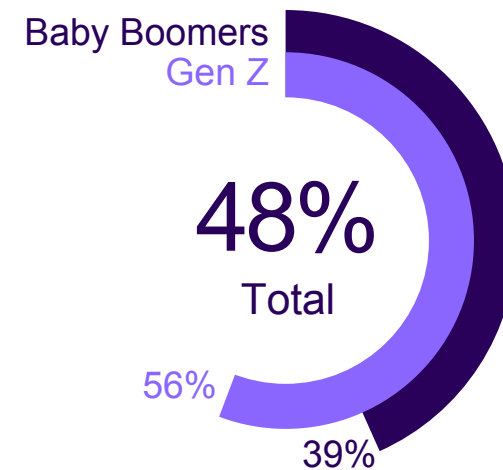


# Now: Digital disruption at work

## Plans to work from home in the next 12 months



Source: Foresight Factory, 16-64, 2022



% globally who **miss time spent with colleagues** now that more of us can work remotely

Source: Foresight Factory, 16+, 2022



# Now: Work takes a backseat to wellbeing



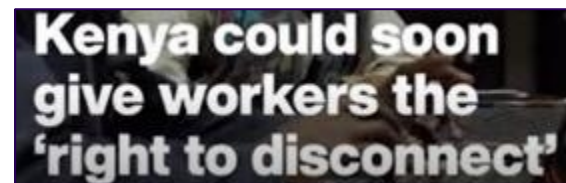
**TikTokers** ease into the work week with “bare minimum Mondays” to protect mental health



Industrial **strikes** pushing for **higher pay** and better working conditions proliferate



Momentum builds in the movement for a **4-day work week**, with trials showing promise



New laws like paid **period leave** and **the right to disconnect** move the needle toward greater workplace wellbeing



# Next: Structural factors to consider



## Consumer Empowerment

How can we ensure AI empowers rather than displaces employees?

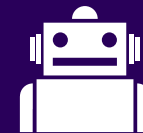


By 2045, futurist Ray Kurzweil has predicted that computer intelligence will surpass that of the human brain



## Digital Lives

How will the rise of automation impact the way we work?

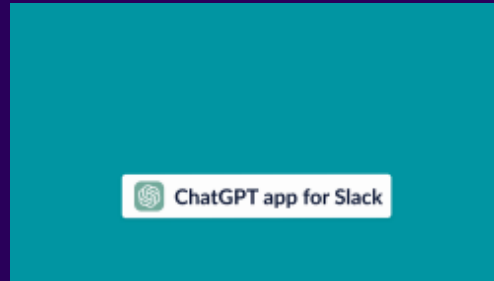


By 2035, **35-50% of jobs** in manufacturing, transportation, storage, wholesales and retail trade will have **high potential for automation**

Source: PwC



# Next: Using AI to enhance, not detract

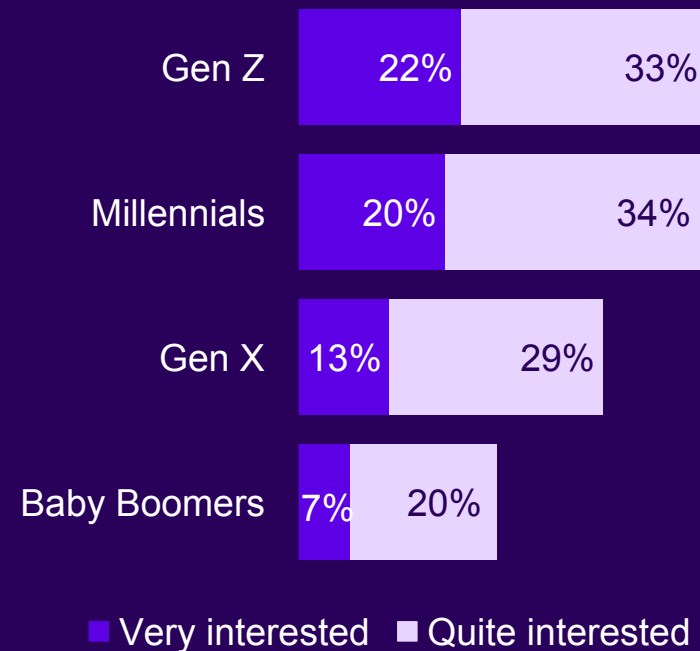


**Microsoft 365 Copilot** unleashes productivity through large language models. **Slack** integrates **ChatGPT** to bring AI-powered convenience to workplace conversations



**Google** stock price slumps after its launch video for **Bard** flubs a question about the James Webb telescope

## Interest in an AI friend to talk to for advice or companionship



Source: Foresight Factory, 16+, 2022



# Helping consumers work alongside AI in the Never Normal

## How to act

**Now:** Be intentional and considerate about **the role of AI within your brand**, and avoid the temptation to move too quickly.

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**Next:** Promote **AI literacy** to empower future generations to interact with the technology in a positive way.

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Explore the potential of **AI to ease loneliness** and support mental health at work and at home.

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Celebrate the traits that make us **innately human** while embracing the convenience of AI.

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# Navigating the Never Normal



**1. Coping with rising costs**



**2. Powering lives sustainably**



**3. Eating well and staying healthy**



**4. Having fun**



**5. Saving for the future**



**6. Working alongside AI**

# Navigating the Never Normal

## Q&A

