TOMORROW'S CONSUMER

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Presented at

NRF RETAIL'S BIG SHOW

New York

TOMORROW'S CONSUMER

- 17 countries in all continents
- + 5,000 interviews
- + 500 trend and behavioral variables
- population above 18 y.o.



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CULTURAL AND BEHAVIORAL TRANSFORMATION

collective fears

dreams

motivations

inertial effects

ambience

SOURCE: TOMORROW'S CONSUMER | DEVELOPED BY WWW.MOSAICLAB.COM.BR | NRF 2021

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collective fears

top 10 issues that most concern society for the next 5 to 10 years

1. Effect of climate change (global warming, rising sea levels ...)
2. Economic financial crises in my country
3. Poverty, social inequality
4. Insecurity (assaults, violence ...)
5. Global economic financial crises, economic recession
6. New and strong epidemic or pandemic waves
7. Natural disasters (tsunami, earthquakes, cyclones ...)
8. Corruption
9. Animal extinction
10. Reduction of non-renewable natural resources

TOMORROW'S mosaiclab

collective fears

 # top 10 issues that most concern society for the next 5 to 10 years

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10. **Reduction of non-renewable natural resources**



4 of 10 are related to environmental concerns.

This has a growing and strong impact on the way people decide about their lifestyle and brand consumption.

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collective fears

 # top 10 issues that most concern society for the next 5 to 10 years

Strong relevance of the economy and society implications when there is a lack of balance (poverty, insecurity, corruption)



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New element added to collective concerns: PANDEMIC FEAR.

Really affected the social mindset.

There is a strong difference by generation in future concern about new pandemics.

YOUNGER, LESS CONCERN
_ HYPER CONNECTED BY NATURE
_ LESS AFFECTED IN HEALTH
_ WORKS AND STUDIES FLEXIBILIZED



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DIFFERENCES PER COUNTRY IN THE TOP 10 ISSUES THAT MOST CONCERN SOCIETY FOR THE NEXT 5 TO 10 YEARS

SOCIAL SECURITY & URBANIZATION IMPACTS



Dissemination of false, manipulated news, fake news

UNITED STATES TOP 7

Terrorism, attacks

GERMANY TOP 2
NETHERLANDS TOP 3
FRANCE TOP 5
JAPAN TOP 5
AUSTRALIA TOP 6
UNITED KINGDOM TOP 7

High population density & problems with urban mobility

CHINA TOP 5

Intolerances (political, racial, gender, age,...)

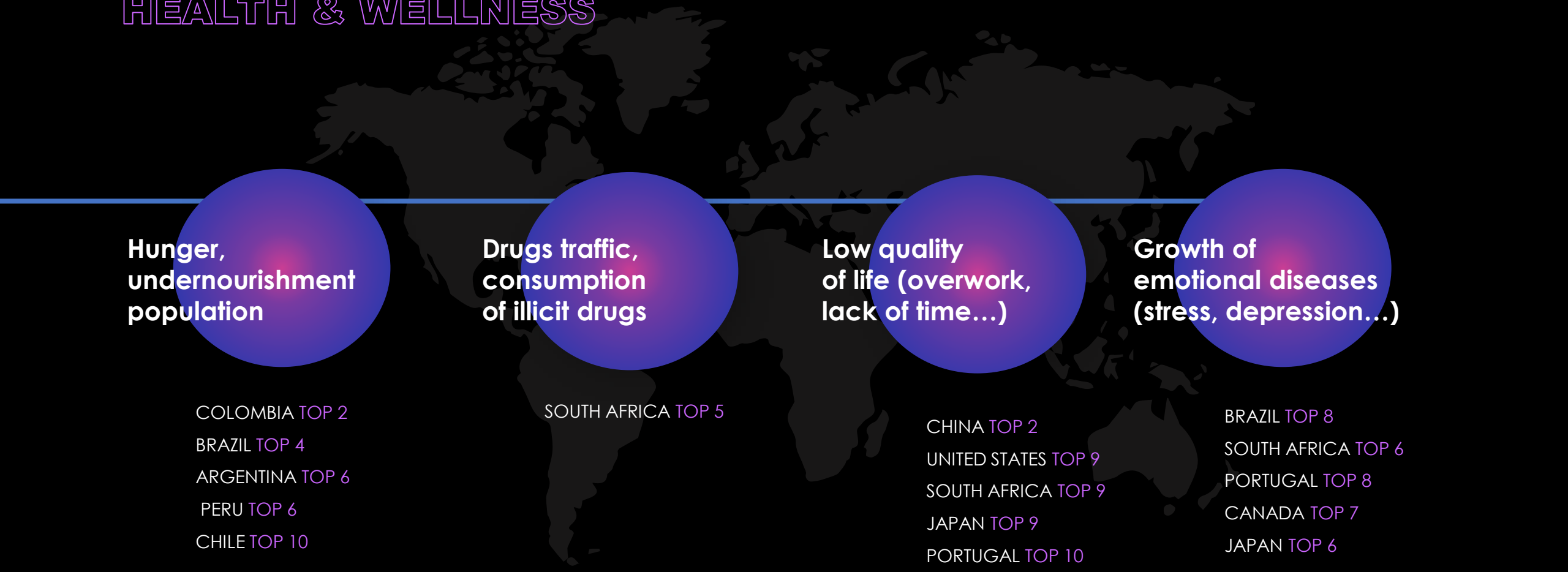
NETHERLANDS TOP 4
GERMANY TOP 6
SOUTH AFRICA TOP 10

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DIFFERENCES PER COUNTRY IN THE TOP 10 ISSUES THAT MOST CONCERN SOCIETY FOR THE NEXT 5 TO 10 YEARS

HEALTH & WELLNESS



Hunger, undernourishment population

COLOMBIA TOP 2
BRAZIL TOP 4
ARGENTINA TOP 6
PERU TOP 6
CHILE TOP 10

Drugs traffic, consumption of illicit drugs

SOUTH AFRICA TOP 5

Low quality of life (overwork, lack of time...)

CHINA TOP 2
UNITED STATES TOP 9
SOUTH AFRICA TOP 9
JAPAN TOP 9
PORTUGAL TOP 10

Growth of emotional diseases (stress, depression...)

BRAZIL TOP 8
SOUTH AFRICA TOP 6
PORTUGAL TOP 8
CANADA TOP 7
JAPAN TOP 6

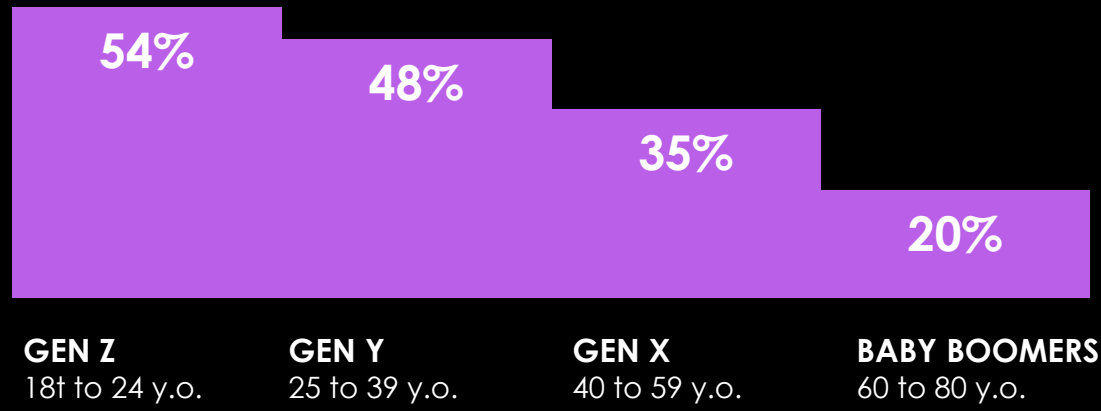
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Emotional illnesses are a subject that companies should be aware of specially for younger generation.

Conscious not only in product or service development, but also concerned about employees, and how-to better deal with the situation, helping them with it.

% BELIEVES THAT HAVE A CHANCE OF **DEVELOPING AN EMOTIONAL PROBLEM** [STRESS, DEPRESSION, ANXIETY ...] IN THE NEXT 5 TO 10 YEARS

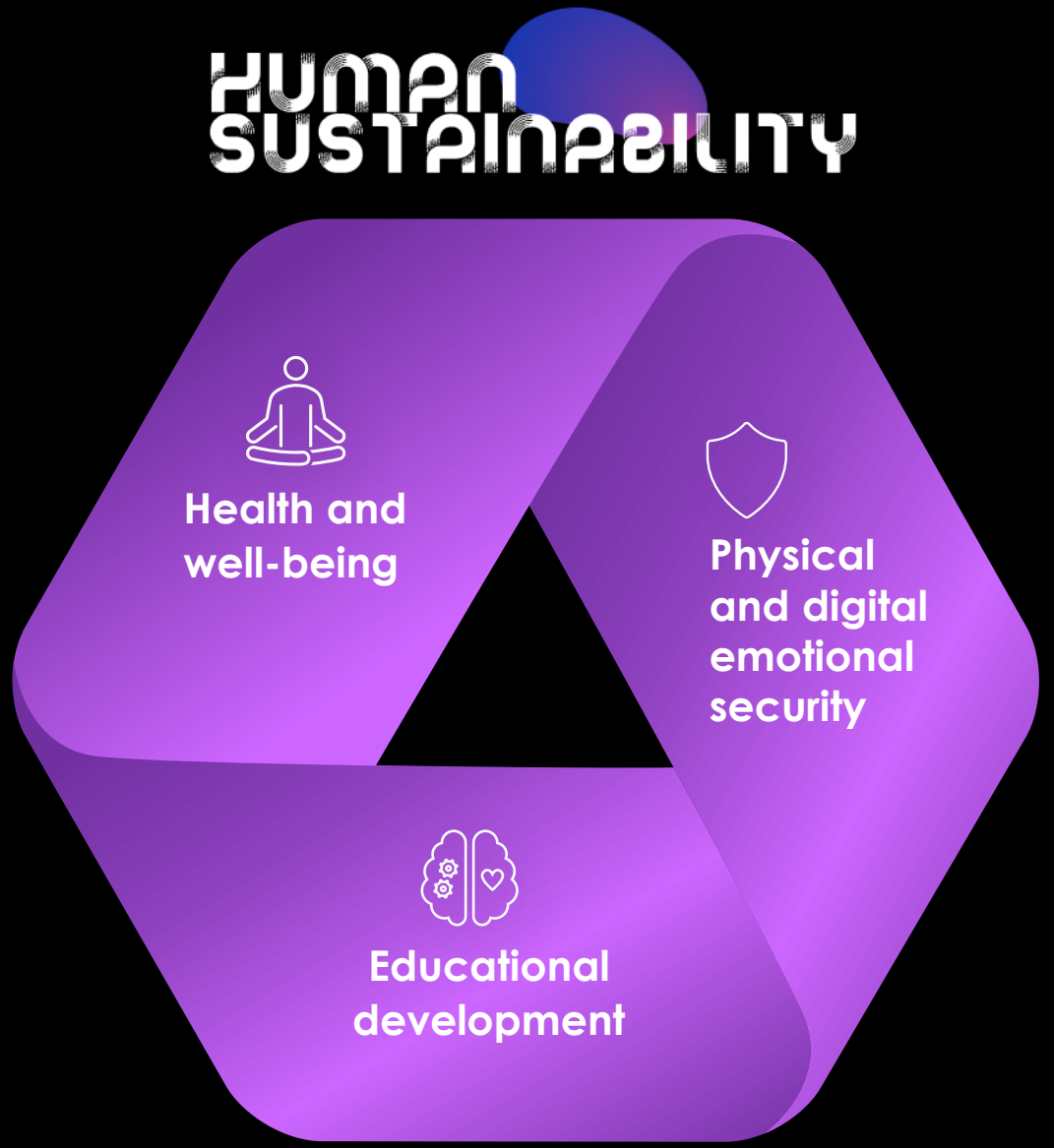




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An emerging trend from this context is Human Sustainability.

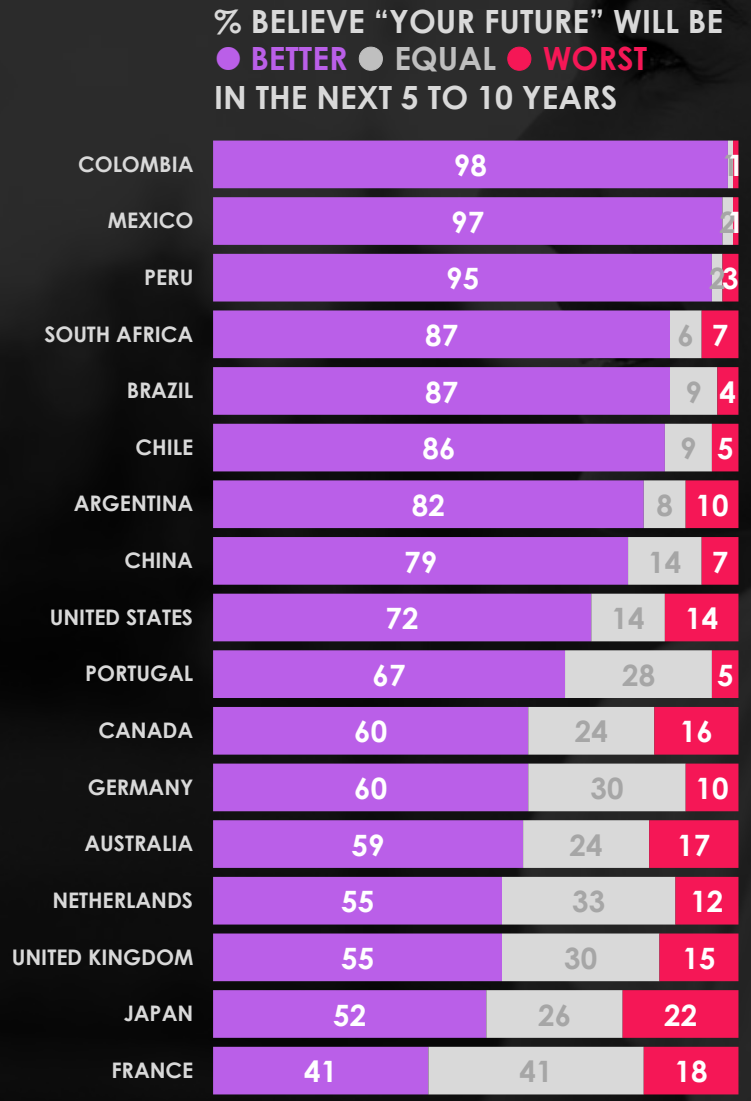
Preserve and improve the quality of life aiming access and balance of health and well-being, emotional, physical and digital security and educational development.

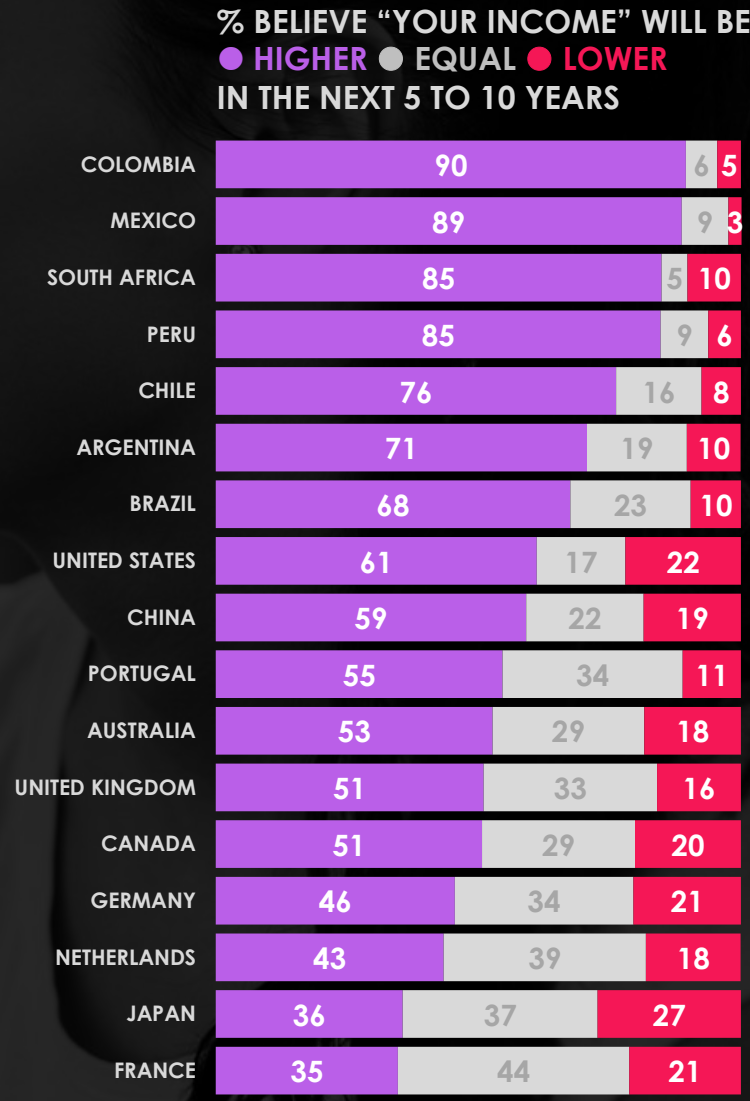


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Even though all these issues, population has a positive view about the future.





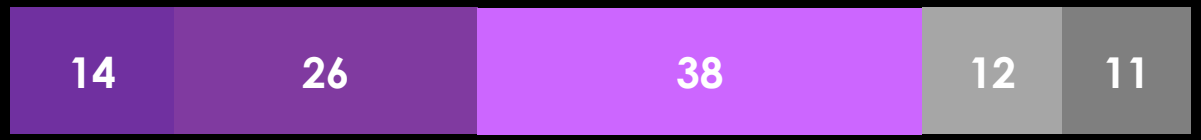
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People are mobilizing to solve social problems.

78% declare that are getting involved in positive actions.

Thinking about these society problems, how much do you get involved, do you mobilize to solve them?



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SOURCE: TOMORROW'S CONSUMER | DEVELOPED BY WWW.MOSAICLAB.COM.BR | | RF 2021

POSITIVE CONSUMERS

are more than a buyers, they engage with services and branded content.

- ENGAGE WITH RELEVANT IDEAS AND PURPOSES
- NON-LINEAR CONSUMPTION JOURNEY
- HYPERCONNECTED EXPERIENTIAL FLUID
- PASSIONAL IMMEDIATIST REACTIVE

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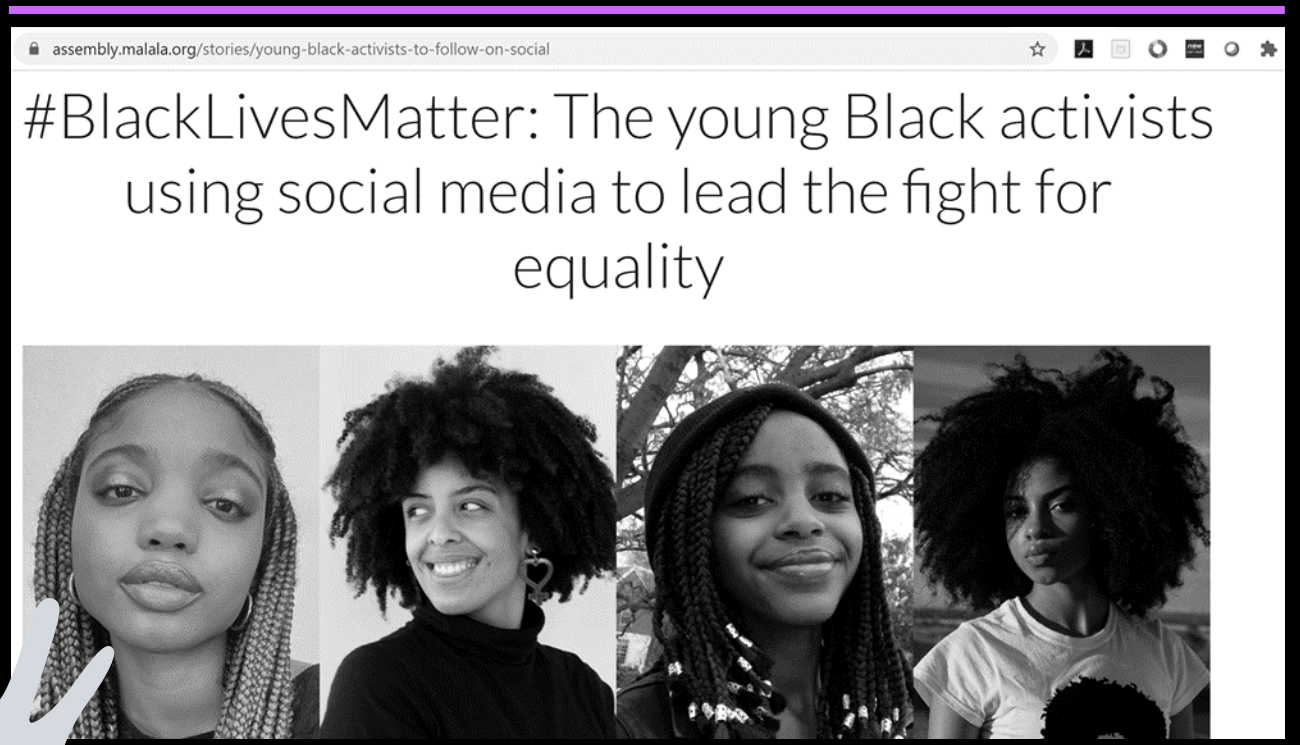
In addition to society, they believe that those who help to solve social problems are:

YOUNGERS, PERSONALITIES AND DIGITAL INFLUENCERS

43%

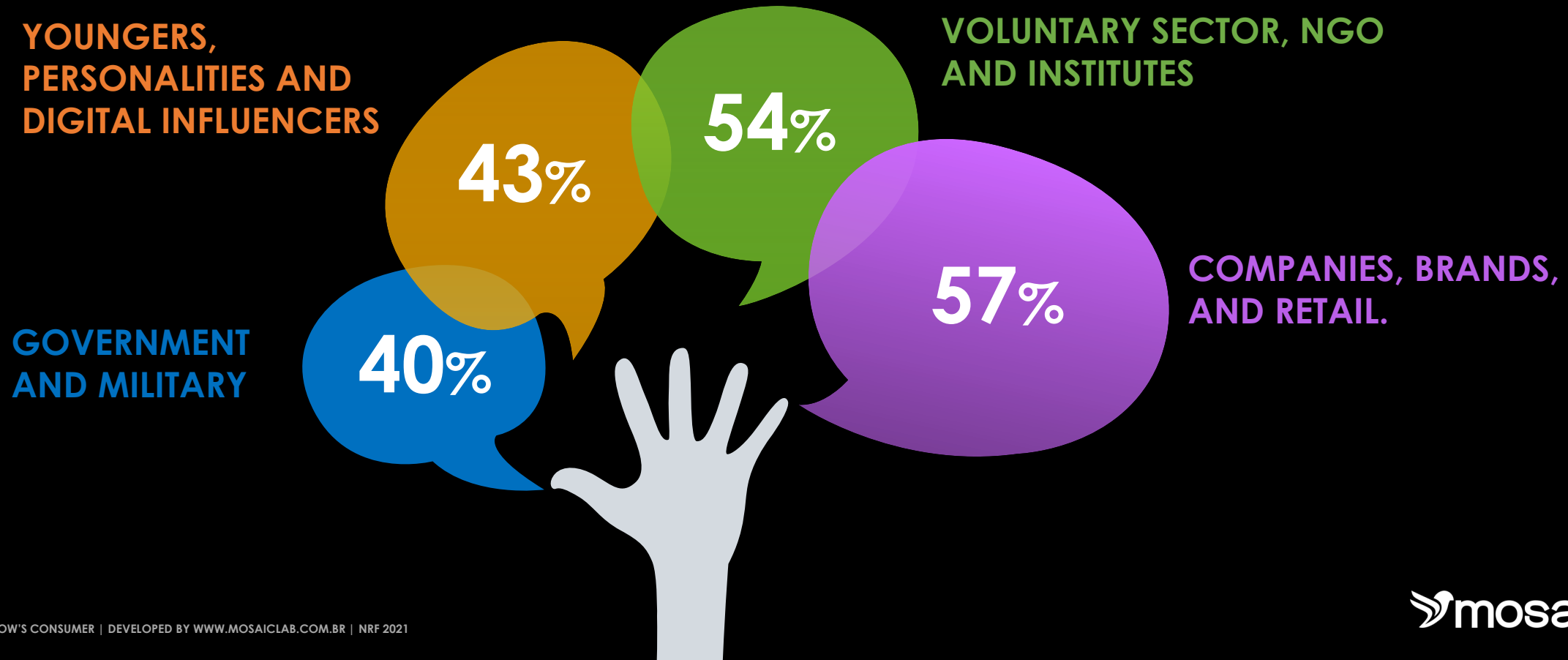
GOVERNMENT AND MILITARY

40%



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In addition to society, they believe that those who help to solve social problems are:



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Population expects companies play a relevant role to solve social problems.

As profits come from the consumption of the community, they expect a social return.

POSITIVE CONSUMER



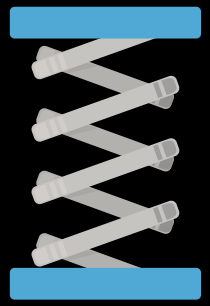
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BRAND ATTRACTIVENESS | MACRO DRIVERS

To better understand what connects Positive Consumers with brands they admire, we carry out a territory's analysis and found four macro drivers:

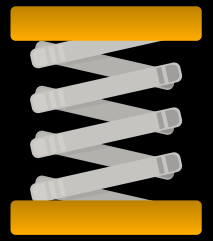
MEGA POWER



RELEVANCE
68%

- INNOVATIVE
- GLOBAL
- VISUALLY ATTRACTIVE
- DIGITAL PRESENCE
- PREMIUM VALUE
- CULTURAL FUSION

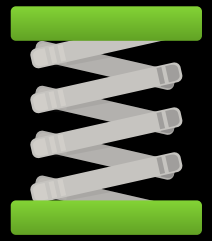
EXPERIENTIAL CONNECTION



RELEVANCE
64%

- TRUE EXPERIENCES
- AUTHENTIC STYLE
- TRUE VALUES
- TEACH SOMETHING NEW
- INSPIRING GENUINELY

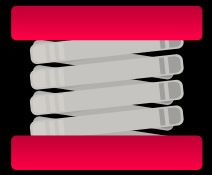
EVOLUTIONARY LIFE-CHANGING



RELEVANCE
64%

- ACT IN A SUSTAINABLE WAY
- PROMOTE SOCIAL INCLUSION
- FIGHT AGAINST ILLICIT WORK.
- CARE FOR PRODUCTIVE CHAIN (EMPLOYEES, SUPPLIERS ...)
- HONEST, TRANSPARENT

PROMO DISCOUNTS



RELEVANCE
39%

- LOW PRICE PRODUCTS
- PROMOTIONS
- DISCOUNTS

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PANDEMIC LEARNINGS

90% learned something for life due to pandemic period.

Pandemic brought to the population a strong reflection of daily life aspects and values.

Rethink and revalue
consumption needs,
family relationship,
use of time, profession, leisure
and nature importance in daily life.

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For the future, pandemic impacted and accelerated movements that arrived to stay

- HIGHER RELEVANCE OF HEALTHINESS, IMMUNITY
- HIGHER CONNECTIVITY
- MEGA CONVENIENCE (DELIVERY, SUBSCRIPTION...)
- CONNECTION WITH ROOTS, NATURE, THE REAL, TRUTHS
- INCREASED THE FUTURE DESIRE FOR EXPERIENCES (TRAVEL, LEISURE, ENTERTAINMENT ...)
- INCREASED PURCHASE INTENT BASED ON SECURITY (DURABLE GOODS, CARS,...) BUT ALSO REFLECTION ABOUT REAL NEEDS
- COLLECTIVE DESIRE OF GENUINE INCLUSION



TO CREATE TRUE CONNECTIONS
BRANDS MUST BE AWARE OF THESE EXPECTATIONS

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People expect to be accepted in a genuine way in their personal lives.



genuine inclusion

TRUE ACCEPTANCE OF DIFFERENCES

SOCIAL	ORIGIN
GENDER	THOUGHT
SEXUAL	AGE
ORIENTATION	BODY
RELIGION	STYLE

SOURCE: TOMORROW'S CONSUMER | DEVELOPED BY WWW.MOSAICLAB.COM.BR | NRF 202

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People expect to be accepted and included in a genuine way in their work lives.

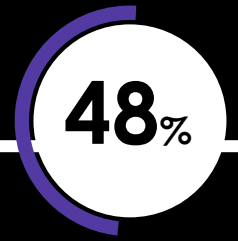
GENUINE INCLUSION

WHAT DO YOU BELIEVE THAT WILL INCREASE IN LABOR MARKET, IN THE NEXT 5 TO 10 YEARS?



INCLUSION

- Inclusion and acceptance for diversity (ethnic, gender, cultural....)
- Inclusion and acceptance for people with special needs (physical and mental)
- Inclusion and acceptance for older people



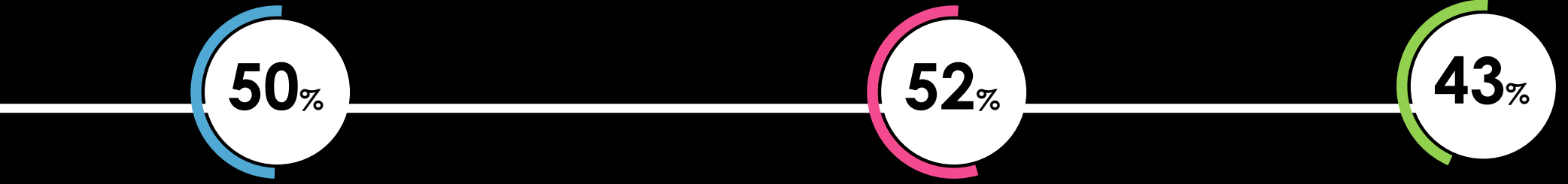
EQUAL RIGHTS

- Gender: payment equality
- Gender: rights equality when they have children (parental leave time, flexible hours ...)

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People expect to be accepted and included in a genuine way in their work lives.



FLEXIBILITY

- Changes in the hiring: higher presence of freelancers, flexible schedules,...
- New professions that don't even exist or are just starting

FLUID ENVIRONMENT

- Increased the use of home office
- Increased the use of shared offices (co-working)

BALANCE

- Encouraging companies to have more free time, work balance
- Increase of environments in companies for leisure, games, decompression, sports, rest...

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PANDEMIC DIGITAL ACCELERATION

Consumption and cross leanings intensified digitally during pandemic.

SURVIVAL INSTINCT



OUR CONTEMPORARY WEAPONS ARE KNOWLEDGE AND TECHNOLOGY

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PANDEMIC DIGITAL ACCELERATION

Consumer expectations of digital interaction and convenience services in retails increases.

WHAT WOULD YOU LIKE TO SEE MORE IN RETAIL IN THE NEXT 5 TO 10 YEARS?

54%

IN-STORE DIGITAL INTERACTION INTENSIFICATION

- Digital shop window
- Virtual mirror
- VR glasses
- Labels or scannable packaging, to access information by smartphone (tutorial videos,...)

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WHAT WOULD YOU LIKE TO SEE MORE IN RETAIL IN THE NEXT 5 TO 10 YEARS?

58%

RESTAURANT DIGITAL INTERACTION INTENSIFICATION

- Interactive menu, accessed by my own mobile phone
- Place orders from smartphone, even inside the restaurant
- Restaurant with artificial intelligence recommendation
- Restaurant with 3D food printer
- Robots to serve

46%

SMART STORES

- Digital service (e.g., intelligent digital robot as an attendant)
- Stores without employees
- Stores with virtual attendants (vendors who are not physically in the store, but serve by video)



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WHAT WOULD YOU LIKE TO SEE MORE IN RETAIL IN THE NEXT 5 TO 10 YEARS?

38%

KNOWLEDGE RECOMMENDATION AND TRAINING

- More specialized attendants to ask questions and make recommendations
- Stores that teach you how to use your products and services (training, ,...)

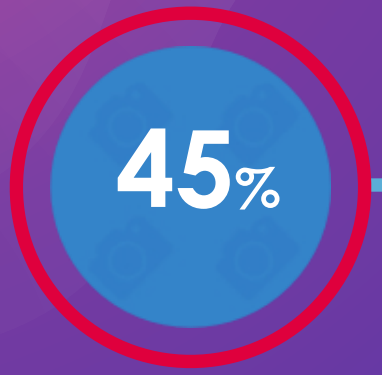
50%

MORE SERVICES AND CUSTOMIZATION

- Stores with services (sewing, customization, ...)
- Stores with products that I can customize as I wish (put details, colors, images...)
- Stores that carry products in my house for me to try with possibility to return

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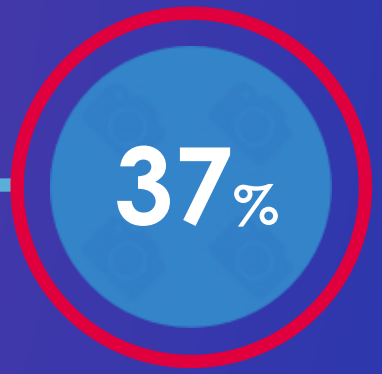
WHAT WOULD YOU LIKE TO SEE MORE IN RETAIL IN THE NEXT 5 TO 10 YEARS?



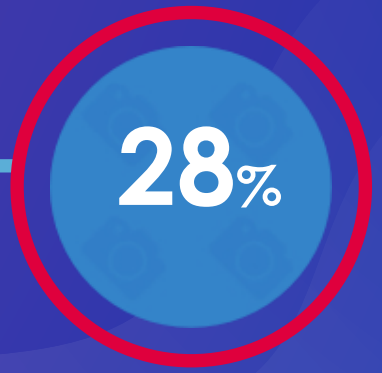
SMART SHOP EXPERIENCE

- Order online and pick up in store
- Itinerant store or restaurants

STORE WITH EXPERIENCE



- Stores with integrated concepts (e.g. shop and bar, shop and playground...)



LIVE COMMERCE

- Purchase of products in where influencers test products live, take questions, make promotions and instant sales of products

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WHAT WOULD YOU LIKE TO SEE MORE IN RETAIL IN THE NEXT 5 TO 10 YEARS?

27%

SHARED ECONOMY

- Use temporarily or rent instead of buying various products such as clothing, footwear, home appliances...

29%

DRONE DELIVERY



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We are an insight hub, a center of living intelligence that turns data into powerful insights, driving confident, future-focused decisions.

For businesses and people seeking strategic clarity amid complexity, we are **the future of applied data intelligence.**

We combine data with innovative analytics, strategic sensitivity **and business acumen** to deliver living, applied intelligence:clear, useful and inspiring.

We think fluidly, through multiple lenses that intersect, connect and reveal the bigger picture. These lenses are our insight hubs: dynamic perspectives that bring together diverse viewpoints to uncover what truly drives businesses, people and markets.

HUB
Influence & Future
Understand today to anticipate tomorrow.

Foresight, scenarios, macro forces and growth opportunities.

HUB
Immersion & Behavior
Uncover what drives choices and behaviors.

Drivers, barriers, motivations, personas and consumption patterns.

HUB
Interaction & Journeys
Decode every touchpoint to elevate the experience.

Journeys, friction points, moments of delight and value optimization.

HUB
Impact & Competitiveness
Drive performance and competitive momentum.

Positioning, marketing mix, pricing, tracking, communication and differentiation.

HUB
Innovation & Activation
Turn insights into tangible growth.

Innovation initiatives, development and validation of ideas, concepts and prototypes.



+10
years of experience

+700
projects delivered

+30
countries analyzed

+60
industries impacted

With a multidisciplinary perspective, we generate and analyze data, combining advanced analytics, cutting-edge technology, human intelligence and strategic vision.

We turn complexity into claritya nd insights into direction.

THANKS!

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developed by

mosaiclab

we're ready to share
more insights with you!
contact us:
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