



# Consumer Trends 2021

*An analysis into the new types of consumers in a dynamic world.*

## Introduction

Driven by the digital revolution, the retail industry is going through a transformation – one that has completely altered the shopping experience for the modern consumer.

According to the third annual Digital Consumer Study, almost 50% of consumers report having performed shopping-related tasks on their mobile phones in the past three months. Consumers surveyed say that they use digital technology to research, browse and purchase, sometimes all on the same website. With the advent of e-commerce and other retail-friendly technologies, consumer demands have shifted towards expedience and convenience. In response, retailers have implemented new strategies to attract and retain the next-generation, omni-channel consumer.

With the rise of influencer marketing, direct-to-consumer (D2C) marketing, peer-to-peer (P2P) marketplaces, re-commerce and more, consumer brands must rethink strategies and reinvent themselves in order to attract and retain the latest generation of consumers. In 2021, the average consumer will belong to one (or more) of four disparate cohorts, each with a unique set of traits and demands, moulded

by evolving social forces and pressures.

Despite the rise of the middle class in markets such as China, India, and ASEAN, we enter the latter half of 2019 on the back of declining GDP growth rates and amid real fears of another global recession, fuelled by the raging Sino-American trade dispute. We live in a time characterised by growing distrust across the board – distrust between the electorate and the elected, between corporations and the public, and – most of all – between governments. This growing distrust between some of the world's economic powerhouses is a worrying sign for a global economy gripped by disruption and rising protectionism. As such, companies must – now more than ever – continue to innovate in order to engage consumers and stimulate growth.

Looking towards 2021, we see the emergence of four distinct types of consumer: the Compressionists, the Kindness Keepers, the Market Makers, and the Cyber Cynics. Each of these consumer profiles are characterised by a unique set of attributes and demands, and businesses must evolve to deploy bespoke strategies tailored to suit each consumer type. At the same time, consumer sentiment can be broadly categorised into three categories: Pressure, Deep Kindness, and Emboldened.

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Dictated by consumer demands, businesses in 2021 must adapt.

Consumers, especially in today's high-pressure environment, favour clean visuals and a streamlined, seamless shopping experience. For e-commerce in particular, a cluttered user interface (UI) is unlikely to improve conversion rates. Less is often more – B2C businesses should focus on fewer SKUs (stock keeping units) and prioritise quality over quantity. In addition, with the rise in salience of social issues among the new generation, corporate care and a focus on values is important in engaging consumers in 2021. Greater investment in direct-to-customer (D2C) strategies will be important. The emergence of 'recommerce' also means that businesses should not neglect aftercare market strategies, rent-to-own collections, and buyback incentives. Finally, to combat cynicism and distrust in the influencer economy, brands need to re-assess and alter strategies for valuable, authentic partnerships, as consumers grow weary of marketing tactics that over-utilise influencers and key opinion leaders (KOLs).

## Consumer Sentiment: Pressure

The advent of social media and the digital revolution has given rise to a very modern phenomenon – the feeling of overwhelming pressure. Encompassing both the economic and social spheres, this pressure is omnipresent and affects people across the demographic spectrum, and has perhaps become the latest “great equaliser”. Whether it's work productivity or gaining likes on social media, people are feeling immense pressure. But at what cost?



## Generation Burnout

Despite being stereotyped as lazy and narcissistic, Millennials are working longer hours than older generations, and for less pay. In a survey of 19,000 Millennials across 25 countries, 73% of Millennials reported working more than 40 hours a week. This always-on work mentality is resulting in high levels of “Millennial burnout” – increased rates of depression and anxiety. Indeed, research shows that the daily pressures for Millennials are considerably higher than for previous generations. Malcom Harris, author of *Kids These Days: Human Capital and the Making of Millennials*, argues that Millennials are bearing the brunt of the economic damage wrought by late 20th-century capitalism, leaving them in a state of perpetual panic. Harris

writes, “If generations are characterised by crises, then Millennials is the crisis of extreme capitalism.” Harris, alongside economists, cites the rising divergence between productivity and compensation. When Gen Xers reached ages 30-34, they saw a 30% income increase compared with the generation before, but Millennials’ income level at the same age fell by 4% in comparison with Gen X. Additionally, Millennials’ net worth is only half that of which Baby Boomers enjoyed at the same age.

### Time Affluence

According to a Harvard Business Review (HBR) and Gallup survey, 80% of adult respondents felt that they did not have time to do all they wanted in a day. Time affluence is at record lows globally. Harvard professor Ashley Whillans says, “Time poverty exists across all economic strata, and its effects are profound. Research shows that those who feel time-poor experience lower levels of happiness and higher levels of anxiety, depression, and stress. They experience less joy. They laugh less. They exercise less and are less healthy. Their productivity at work is diminished. They are more likely to get divorced.”

Research has also found that time stress has a stronger negative effect on happiness than unemployment. Time poverty has led to the rise of “superhuman syndrome”, a term used to describe people trying to stay on top of it all. Despite this, they still can’t shake the feelings of failure and constant pressure to do more. Superhuman syndrome leaves many aiming for perfection - an impossible ideal. A 27-year long meta-study by psychologists Thomas Curran and Andrew Hill found that multidimensional perfectionism encompasses three levels, and millennials

tend to suffer from all three. Self-oriented perfectionists derive their self-worth from achievement - especially relative to others. Socially prescribed perfectionists obtain their self-worth when others approve of or accept them. Other-oriented perfectionists feel a sense of self-worth when others respect and admire them. The economic and social pressures that millennials find themselves under often lead them to seek unrealistic and unsustainable targets.

### Consumer Type: The Compressionists

This consumer type is one starved of time, and favours convenience and ease of purchase over anything else. Businesses must respond accordingly.

#### Decision dilemma

Pressure, time affluence and an overabundance of choice (googling “black dress” yields 7.2 trillion results) are creating a culture of decision exhaustion. A 2017 Microsoft ad claimed that the average person makes 35,000 decisions a day and a Columbia University study found that the average American makes 70 conscious decisions daily. The research is varied, but all estimate daily decision-making is increasing. As such, how will companies prepare for a high-pressure, lowtime group that craves ease of purchase rather than price discounts? In short, declutter the digital experience, use AI/ML to streamline the shopper journey and take a less-is-more approach to product offering.

As a backlash to digital distractions taking the majority attention share (it takes around 23 minutes to refocus after a digital distraction),





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in 2021, the strategic act of non-action will be a key tool for The Compressionists.

## Cancellation culture

Ghosting. Bailing. Cancelling. No matter the term, social media is largely responsible for the growth of cancellation culture. Between group chats, online invites and DMs, replying with an enthusiastic “yes!” is the go-to, default response for many millennials. For Compressionists, this fuels superhuman syndrome and drives last minute cancellations due to burnout.

“People-pleasers often fall into this category – they don’t want to say no to an invitation out of fear of disappointing anyone, but end up over-stretching themselves and cancelling last-minute which leads to an even greater disappointment for the bailed upon,” notes etiquette expert, William Hanson.

This “cancellation culture” may sound trivial, but in fact has long-term, tangible effects - even on the economy. For the workplace, cancelled meetings impact productivity and planning. For the food and beverage industry, cancellations hurt revenue, which is particularly hard for local establishments with tight margins. A 2015 study from online reservation company ResDiary found that cancelled reservations cost the restaurant industry \$16 billion globally.

## Engagement Strategies: The Compressionists

How do companies prepare for a high-pressure, low-time group that craves ease of purchase rather than price discounts? In short, declutter the digital experience, use AI/ML to streamline the shopper journey and take a

less-is-more approach to product offering.

## AI assistance

Whether it’s Amazon filing patents to use public transportation to deliver goods or Starbucks partnering with Uber Eats for a 30-minute guaranteed delivery, AI is transforming speed-to-delivery. The future of retail will focus on leveraging data to anticipate and respond with stress-free shopping solutions.

## CASE STUDIES

For Amazon Echo users that shop with Whole Foods, customers have two hours after the order has been submitted to add something to the shopping cart for same-day delivery. For example, shoppers can say “add milk to my cart” and Alexa will confirm and ask “anything else?” Additionally, based on the customer’s order history, Alexa will ask if they’ve forgotten to order an item. This service has proved valuable to Compressionists with busy schedules that may have overlooked items. Uber is testing AI to ensure that multi-transport commuters have a seamless journey. Uber has partnered with the city of Denver, Colorado, to give users the ability to track real-time public transport information and walking directions, taking the stress out of the journey.

## Clean UI/UX design

A visually overloaded website hurts conversion, as confused and frustrated shoppers won’t buy. Investing in a decluttered UX is as critical to the bottom line as search optimisation.

## CASE STUDIES

Lululemon reported 48% online growth in 2018, largely attributed to a website redesign



that included decluttering product images and faster load times. According to COO Stuart Haselden, since the redesign the number of customers communicating with the brand online has doubled and in Q2 of 2018 there was 80% growth in the company's email file.



### Consumer Sentiment: Deep Kindness

Recent years have seen a boom in kindness. There are corporate kindness classes, Random Acts of Kindness weeks, and shirts with kindness slogans abound on the street. Deep kindness relies on consistent action and challenging our own assumptions.

#### Intellectual humility

The Information Age isn't always accurate

and, as Albert Einstein said, information isn't knowledge. Recent estimates suggest less than 60% of web traffic is human, a phenomenon exemplified by the emergence of "fake news". In addition, online echo chambers on both sides of the political spectrum are keeping people insulated from differing viewpoints and beliefs. Intellectual humility is the recognition that the thing you believe in may in fact be wrong. It's about ditching the ego and being actively curious about our blind spots. People with intellectual humility are better learners, listeners and leaders, and this is becoming a desirable job skill.

As Amazon CEO Jeff Bezos put it, "the smartest people are constantly revising their understanding, reconsidering a problem they thought they'd already solved. They're open to new points of view, new information, new ideas, contradictions and challenges to their own way of thinking."

### Consumer Type: Kindness Keepers

This consumer type places a premium on kindness, values, and social issues. As their numbers grow, so will their economic impact - and businesses must take heed.

#### Impact investing

Kindness Keepers will continue to merge morals and money, making values-driven purchases and investments. A 2019 Lending Tree survey found that one-third of Millennials and Gen Xers boycotted a company that they had previously purchased from and more than one-quarter of those age groups are actively boycotting a product. In addition, this



consumer type prefers to support companies that have received impact investments – the financial practice that aims to generate social and environmental benefits alongside financial returns.

This mindset is driving yearly growth: between mid-2017 and mid-2018, the impact investing market value roughly doubled to \$228 billion in assets under management. ESG (environmental, social and governance) investments now represent 25% of all assets (\$22.8 trillion) under management globally.

“Millennials will see \$30 trillion in wealth under management being transitioned to them in the coming years, and they are twice as likely as previous generations to invest in social impact. So, the change is not just societal, but will also be directly financial,” says Bastiaan den Braber, venture advisor at LUMO Labs.

## CASE STUDIES

The Impact Accelerator Program, an Australian government initiative, backed Hey Startic, a corporate-wear upcycler; the eco-focused baby clothing platform Minikinizz; and Kostoom, an on-demand tailoring service. Southeast Asia is leading the way in impact investing. Patamar Capital and Kinara Indonesia are investing in companies that aim to tackle a range of workers' rights and environmental challenges. The firms recently backed four women-led ethical fashion companies in Indonesia through a peer-selected investment model.

## Engagement Strategies: Kindness Keepers

### Brands should show humility

Brands that admit their faults or past mistakes will resonate with Kindness Keepers. A 2018 study by Accenture found that 48% of US consumers who are disappointed by a brand's words or actions on a social issue complain about it. People are more forgiving of companies when an apology and transparent recovery plan is provided. Remember, not addressing the problem is no longer a viable solution.

### CASE STUDIES

In 2018, a chicken shortage meant KFC had to temporarily close 900 stores in the UK and Ireland. The social media backlash was instant and brutal, so the company responded with a self-deprecating full-page ad in London's Metro and The Sun newspapers with its signature chicken bucket and a re-worked logo: “FCK.”

### Kindness as a KPI

As mass-mattering overtakes mass-marketing, companies need to invest in long-term commitments, not one-time donations. Regularly communicate with your target audiences about the partnership to ensure transparency with funds and resources. Canada Goose launched a programme to “showcase Inuit craftsmanship on a global scale”, and is donating 100% of the proceeds to Inuit communities in Canada. The company commissioned 14 seamstresses, representing nine communities across the four Inuit regions, to create the collection. Rapper Meek Mill and Puma have created





the Clyde Court #Reform. More than just a sneaker with a powerful message, both are connected to the recently established Reform Alliance organisation to improve the US criminal justice system. The Reform Alliance includes Meek, Puma Basketball creative director Jay Z and New England Patriots owner Robert Kraft.

## Consumer Sentiment: Emboldened

Despite the rise of emotional fragility in the West, Africa, India and Southeast Asia are experiencing a wave of optimism that will result in social and political change. Rising youth populations in these developing regions are responsible for this regional dichotomy, as Western populations continue to age.

### Demographic polarisation

A key driver for 2021, age disparity is reshaping the population pyramid. Globally, 14% of the world's nations have a population in decline and by 2050 that figure will rise to a third. In China 17% of the population is aged over 60, forecasted to rise to more than 30% by 2050. In Japan, more than 28% of the population is aged 65-plus. In the UK, Australia and most of Western Europe, the pattern is the same. This scenario is starting to cause intergenerational friction as younger people (already financially strapped) are faced with picking up long-term elderly care costs.

Based on youth population alone, it is likely the next generation of leaders, creatives and shoppers will come from these regions. More than half of India's population (600m) is under 25. By 2050, Africa's youth population will increase by 50%, making it the most youth-populated continent.

By 2030, middle income households – those earning \$10,000 or more per annum – are forecast to increase by 51m in Indonesia, 18m in Vietnam, 11m in the Philippines and 8m in Thailand, according to the Economist's Intelligence Unit. This burgeoning cohort is seen as promising, not just because of the rising middle class, but because of the steady youth population.

### Pride and patriotism

"Chinese consumers, especially the younger generation, don't just believe the notion that foreign brands are better. Right now, Chinese consumers think China is good and 'made in China' is not bad at all," says Charlie Chen, director of consumer research, Credit Suisse. The influence and power of Chinese brands are rising globally. According to a 2018 report by Kantar, China's Top 100 Total Value brands increased sales 23% y-o-y. The biggest spike is in overseas revenue. Lenovo reporting 72% of its earnings were from outside China in 2018. As more Chinese youth see Made in China as a badge of honour, the international market share will see declines. This is a wider trend: Indian, African and Brazilian youth no longer look to the West for inspiration or idols. They look to their smartphones for local peer influencers and 'home-grown' entertainment.

### Act now or pay later

"Adults keep saying we owe it to the young people, to give them hope. But I don't want your hope. I don't want you to be hopeful. I want you to panic. I want you to feel the fear I feel every day. I want you to act," 16-year-old Greta Thunberg told a packed audience at the 2019 World Economic Forum

Thunberg inspired multiple youth-led rallies



across Europe demanding action on climate change. With eco-anxiety (chronic concern over environmental issues) slowly rising, companies need to put sustainability at the forefront or risk losing future consumers. This is not just a Western sentiment – 82% of Southeast Asian Gen Z claim they prefer products from sustainable or ethical brands, and 58% of Chinese Millennials are willing to pay more for ethical brands.

### Consumer Type: Market Makers

This consumer type values equitable local innovation and representation. If they can't find an opportunity, they'll create it.

#### Efficiency vs market-creating innovations

Market-creating innovations do exactly what the term implies: they create new markets. For frontier markets, this means serving people for whom either no products or services existed or the access was limited due to price.

For the West, there's been a decline in market-creating innovations. Fearful of economic instability, companies are opting for efficiency innovations – doing more with less resources. With efficiency innovations, companies can become more profitable and free up cash flow, but they often sell to overcrowded markets. This has been less of a problem in the developing world, where innovation is less hindered. Identified in the 2020 macro-trend Empower Up, hands-on creativity is rising as underserved communities mobilise to design their futures.

Nairobi-based start-up BRCK pointed out

that the next 800m internet users will come from Africa. With free Wi-Fi and tablets, BRCK brings rural regions online, empowering African youth to use digital tools for creative outputs.

In Brazil, social underdogs are becoming cultural icons. Jacaré Moda is a modelling agency that empowers new voices by casting directly from low-income neighbourhoods. Meanwhile, non-profit Fa.vela holds the Creative Run: the first accelerator helping favela-based creatives to grow their ideas into businesses.

#### The Under-served

While emerging countries focus on creating new markets, other regions are focused on under-served ones, such as minorities and people with disabilities (PWD).

Generation M (Muslim Millennials) are slowly gaining ground as more modern fashion hits the high street. The next industry poised for growth is Halal travel. The Mastercard-CrescentRating Halal Travel Frontier 2019 reported an uptick for impromptu weekend trips for Generation M.

According to the World Health Organization, there are an estimated 1.3 billion people with disabilities (PWD) who would constitute an emerging market the size of China.

The growing elderly population adds to this group daily. Whether it's assistive products, apparel and life necessities, including jobs and housing, technology is enabling this group to lead better lives. From hi-tech jackets built for the mobility impaired to companies such as Starbucks opening up cafés for the hearing impaired, the innovations to assist these shoppers is growing.

The global elderly and disabled assistive devices market is expected to surpass \$26 billion by 2024, with care robots, wearables and adaptive fabrics leading the way.



## Engagement Strategies: Market Makers

### The Reverse supply chain

The reverse supply chain, also known as re-commerce, exemplifies the growing trend toward transforming consumption through reuse. Its central premise is deceptively simple: one person's trash can be another person's treasure. At its most basic, this can be as mundane as selling gently used items to people who want them. Re-commerce is the

business of this new approach, and it turns consumerism on its head while creating new markets and driving sustainable consumption.

Re-commerce retailers like Momox, ReBuy, and Quoka.de are the biggest drivers of the industry. Momox, which resells books, console games, CDs, and DVDs, has recorded double-digit growth every year, for seven consecutive years, earning €150 million in 2016 alone. The global market for refurbished smartphones grew 13% in 2017, reaching close to 140 million units. This was in contrast with the global new smartphone market that grew a scant 3% last year.

## Consumer Type: Cyber Cynics

This consumer type is cynical of technology and suspicious of big data and tech companies - and for good reason. Trust has been eroded, and businesses must be able to reassure this group of consumers that they can be trusted.

### Surveillance capitalism

Security expert Bruce Schneier wrote that "surveillance is the business model of the internet". People seemed OK with this when the B2C data exchange was an email address or referring a friend for a discount code. But now, as increasingly huge data breaches make headlines, consumers have a better understanding of the true cost of the data exchange and a new term has emerged to describe the market.

Surveillance capitalism works by providing free services that people willingly use, enabling the service providers to track and monitor the behavioural attributes of the

users. The monitoring is often done without consent, and as the Internet of Everything (IoE) grows more sophisticated, surveillance capitalism has evolved beyond social media platforms to product devices.

Many businesses can afford to sell consumer products at low prices, only because the real value lies beyond the purchase, in a phenomenon known as post-purchase monetisation.

## Post-purchase monetisation

Smart TVs are a prime example of post-purchase monetisation. Some consumer electronic companies sell the TVs for a fraction of the costs. The real value is the constant data stream collected from the TV that is sold to third parties. The data includes the types of shows a viewer watches, approximate location and viewing times, and ads that are watched or skipped. It's a data goldmine – but this may soon change. A 2019 global survey from IBM found that 75% of consumers will not buy a product from a company (no matter how great the product is) if they don't trust the company to protect their data.

## Data disbelievers

Cyber Cynics and companies are increasingly aware of data inaccuracies. For example, a customer is shopping for gifts and the next time they visit the retailer's site they only see similar products to the search. Useful data is problematically rare.

Data aggregation is more complex than taking point-of-sale or online customer habits and dumping them into a database in hopes of gaining "deep insights". Ultimately, meaningful data - and thus, actionable

intelligence - is more valuable than comprehensive data.

Influencers losing influence (and trust)

Data distrust causes distrust of influencers, particularly with late Millennials and Gen X. Between bought engagement and fake accounts (a recent New York Times investigation reported 15% of Twitter users are bots and up to 60m Facebook accounts are automated or bots), more people and companies want regulation of the influencer economy. Despite this, the Association of National Advertisers' 2018 annual report found that "75% of marketers currently work with influencers and of that 43% plan to increase spending in the next year".

Yet the same report found that only 36% of companies judged their influencer marketing efforts as effective, and 19% admitted they thought that the money spent was ineffective. Companies are taking a stand: Unilever's chief marketing officer, Keith Weed, called for "urgent action" to clean up the influencer marketing ecosystem, and Kellogg's announced they are no longer paying influencers based on reach due to fraudulent and dishonest activities.

Joseph Harper, social media lead at Kellogg's, said at the Digiday summit, "One agency we work with said a campaign was a success... but when we dug deeper into the report, we realised that the influencers we'd paid had just gone to a WhatsApp group of other influencers and asked them to make all of those comments."



## Engagement Strategies: Cyber Cynics

How do companies prepare for a cohort that will choose data ethics over brand loyalty and price? Access and accountability.

### Datanomics

The realisation that the digital data we create is a commodity to be bought and sold will drive the growth of data as currency. There is a growing public debate around how individuals should be compensated for the use of personal data. In May 2018, Dutch activists founded the Datavakbond, a data labour union, whose collective aims include seeking payment for commercial use of personal data.

Brands and retailers aiming for hyper-transparent transactions should create reward systems for trading data or partner with established programmes.

### CASE STUDIES

Wibson is a start-up that purchases user data in exchange for points that are redeemable for Spotify Premium accounts, Visa gift cards and Uber credits.

Users of the Sweatcoin app collect one “sweatcoin” for every 1,000 steps they take and can redeem tokens against a changing range of incentives.

Killi takes it even further, offering consumers cash for sharing their data, location or providing insight about what ads they’d like to see. Even more money is on the table if users scan the back of their driver’s license with a smartphone or give more personal details.



According to the company, participating brands include McDonald’s, GM, Danone and Staples.

### New value exchange

For companies where paid data compensation isn’t an option, be transparent and highlight the value exchange whether it’s a service, convenience or reward. For example, people who share their data with a health app are less cynical because the value exchange is keeping them healthy. Consumers understand that there will be some degree of commodification of data, but are generally willing to trade data - at least some - for service and convenience.

### Post-truth to post-trust

For Cyber Cynics, the term “vanity metrics” is likely met with eye-rolls. Identified in the Social Media Drivers 2019 report, consumers are growing more sceptical about the platforms and influencers pushing products. As fake sponsored ads continue to rise, brands must prioritise transparency and build a forum for closed, secure engagement.

### CASE STUDIES

RÜH is a women’s label that “champions a private sense of identity in a time of

overexposure". Audiences must request access to the brand's ("private") Instagram.

Starface is a pimple-positive beauty account that focuses on creating empowering content for its closed community of followers.

Conde Nast Traveler's Women Who Travel is a closed Facebook group for female travellers that boasts 126k engaged members.

## The face of AI

As industries continue to automate, the human element is critical for this cohort. There is no denying that data is being collected and exchanged. A recent survey by Emarsys found more than four in five (82%) are now aware of the use of AI in their shopping experience. However, human interaction lessens the "Big Brother" paranoia. Companies need to offset the data exchange with a human one.

## CASE STUDIES

San Francisco-based online grocer Farmstead uses AI to determine demand to avoid overstocks, which reduces local food waste and saves time and fuel on delivery routes. As Farmstead works with local farmers and grocers, they've kept the model open to talk and exchange with the local farming community.

TD Ameritrade mixes real investment agents with a bot named Alvi, who is incredibly human-like. AI-powered Alvi asks them personality-minded questions, like "if you could write a letter to your 17-year-old self, what would you say?" Both agent and Alvi work together to provide tailored, investment-based information.

## Conclusion

Ultimately, consumers have had their say, and the message is clear – the future consumer is willing to pay a premium for convenience, authenticity, and ethically sourced or produced goods. Companies will do well to embrace a values-based approach to their marketing strategies, as today's young, socially progressive consumers have shown little hesitation in boycotting brands that they perceive to be ethically questionable. At the same time, brands must re-evaluate their use of influencers and KOLs in marketing, as it becomes increasingly difficult to stand out from the competition on hyper-saturated social media platforms such as Instagram. Authenticity, in particular, is proving hard to come by. A major theme emerging in these trends is the need for brands to "keep it real." Retailers need a deep understanding of their customers, not just as consumers to extract more money from, but people with a diversity of needs that cuts across all aspects of their lives. In 2021, retailers will, above all, need to be authentic, be real, and be human - even as techno-powered consumers force them to turn increasingly digital. Businesses will need to retain the human connection – even in the face of rising digital disruption – in order to prosper in the evolving consumer landscape. ■

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