

# FUTURE CONSUMER 2018

WGSN



# CONSUMER PRIORITIES







THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PRIORITIES 2018: ECO-EFFICIENCY



WGSN



Cut & Twist  
by UNMADE White Label

Merino jumper  
£200

Colour

Options

Details

Arctic Turquoise & Electric Blue

Undo

Redo

Reset

Size Guide

Female

Medium

SAVE FOR LATER?

BUY

Delivery estimate – will arrive in January



MADE IN  
LONDON





**THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PRIORITIES 2018: ECO-EFFICIENCY**



**“It’s estimated that 10% of all the clothes made in the world go straight to landfill – that’s insane.”**

**WGSN**

**Ben Alun-Jones, Knyttan**



THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PRIORITIES 2018: ECO-EFFICIENCY

“

KEEP ONLY THOSE THINGS THAT SPEAK  
TO YOUR HEART. THEN TAKE THE PLUNGE  
AND DISCARD ALL THE REST.

”

- MARIE KONDO,  
THE LIFE-CHANGING MAGIC OF TIDYING UP

WGSN



THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PRIORITIES 2018: ECO-EFFICIENCY



WGSN



**“Expect dramatic regulatory change in key sourcing markets from China to Africa... Companies will be forced into global initiatives... take approach to engage top management for a strategic change.”**





[MEMBER ACCESS](#)

[JOIN US](#)

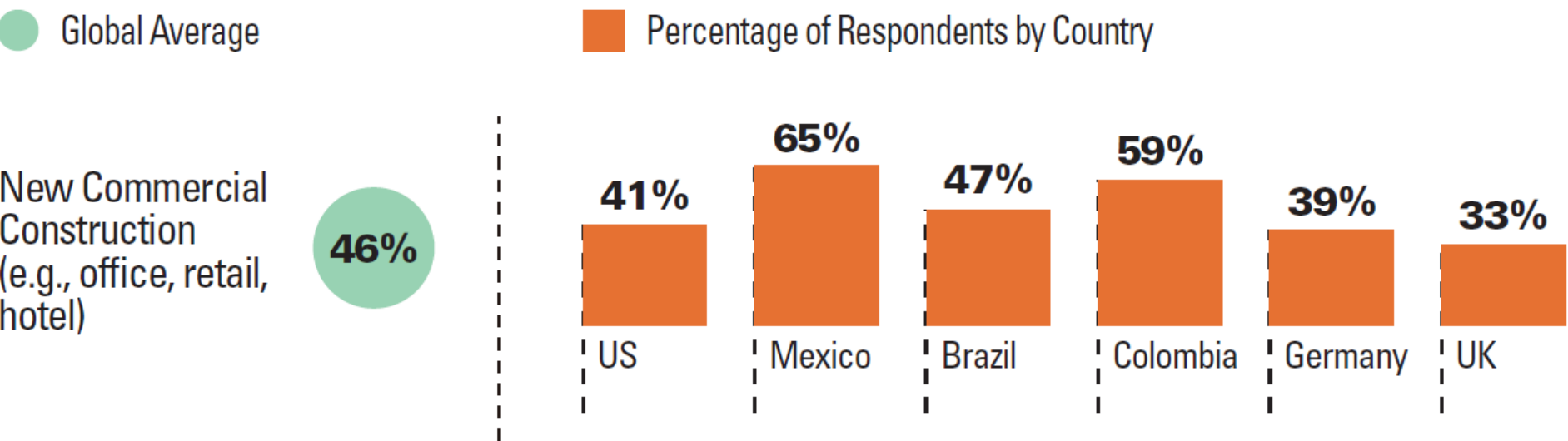
- [The Coalition](#)
  - [Our Members](#)
  - [The Higg Index](#)
  - [Collaboration & Impact](#)
  - [Get in Touch](#)
  - [In the Media](#)
- [Brands & Retailers](#)
  - [Manufacturers](#)
  - [Academic, Affiliates, Government, and NGOs](#)



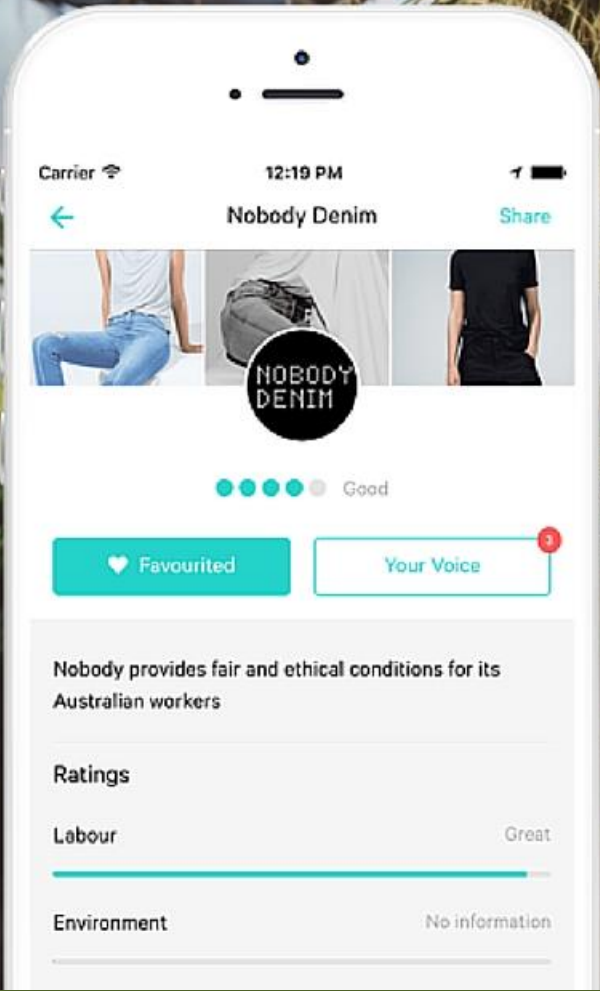
WILLIAMS-SONOMA



## Planned Green Construction Activity Over the Next 3 Years



DISCOVER ETHICAL  
BRAND RATINGS  
IN THE PALM OF  
YOUR HAND







# THE FUTURE CONSUMER: BEHAVIOUR CHANGES

## PRIORITIES 2018: ECO-EFFICIENCY



Cheap Monday



H&M



Cheap Monday



H&M



& Other Stories



Marks & Spencer

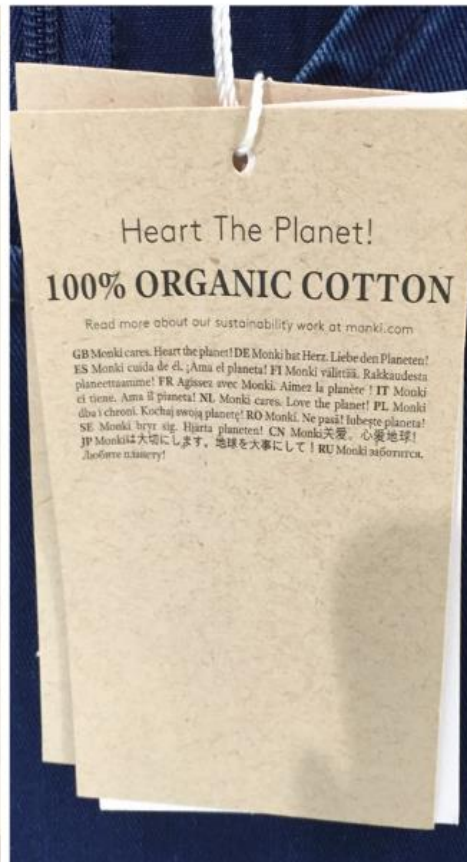


# THE FUTURE CONSUMER: BEHAVIOUR CHANGES

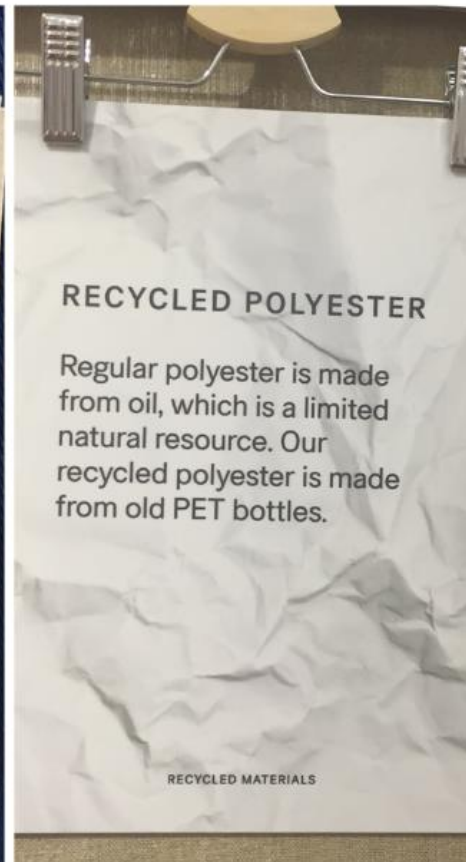
## PRIORITIES 2018: ECO-EFFICIENCY



H&M



Monki



H&M



Marks & Spencer



Uniqlo

**IF IT'S MELTED,  
IT'S RUINED!**

“85% of millennials are asking for brands to have a purpose”





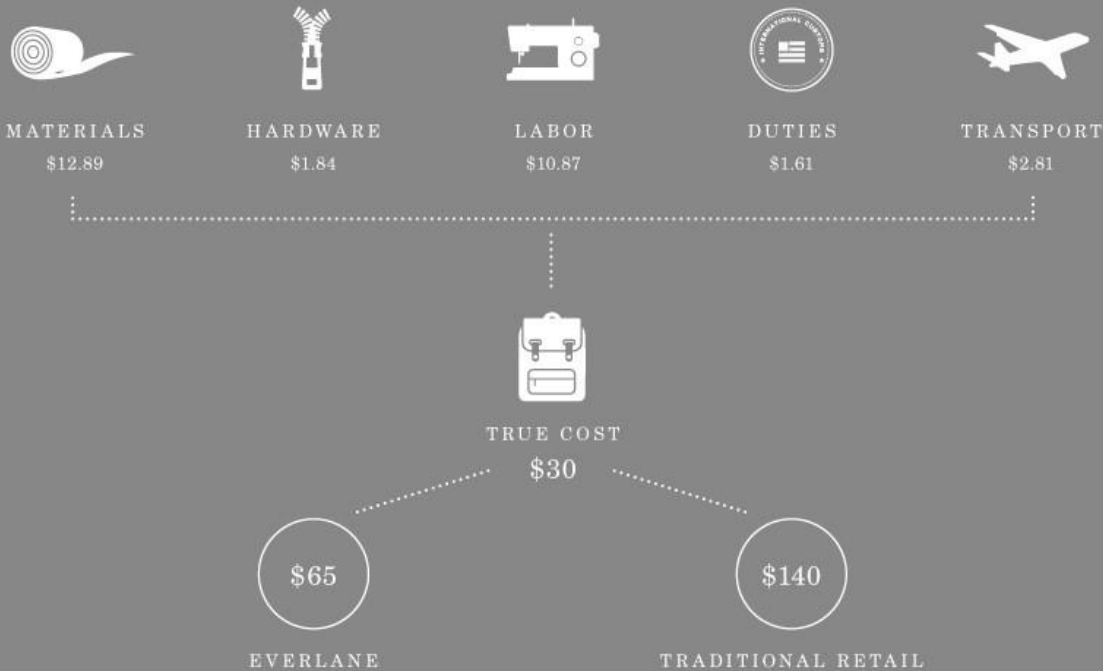


**“I don’t know any person or brand that’s perfect. If you are honest, odds are I’ll like you better despite any imperfections. And dishonesty is much riskier, now that just about everything is discoverable.”**

THE TWILL SNAP BACKPACK

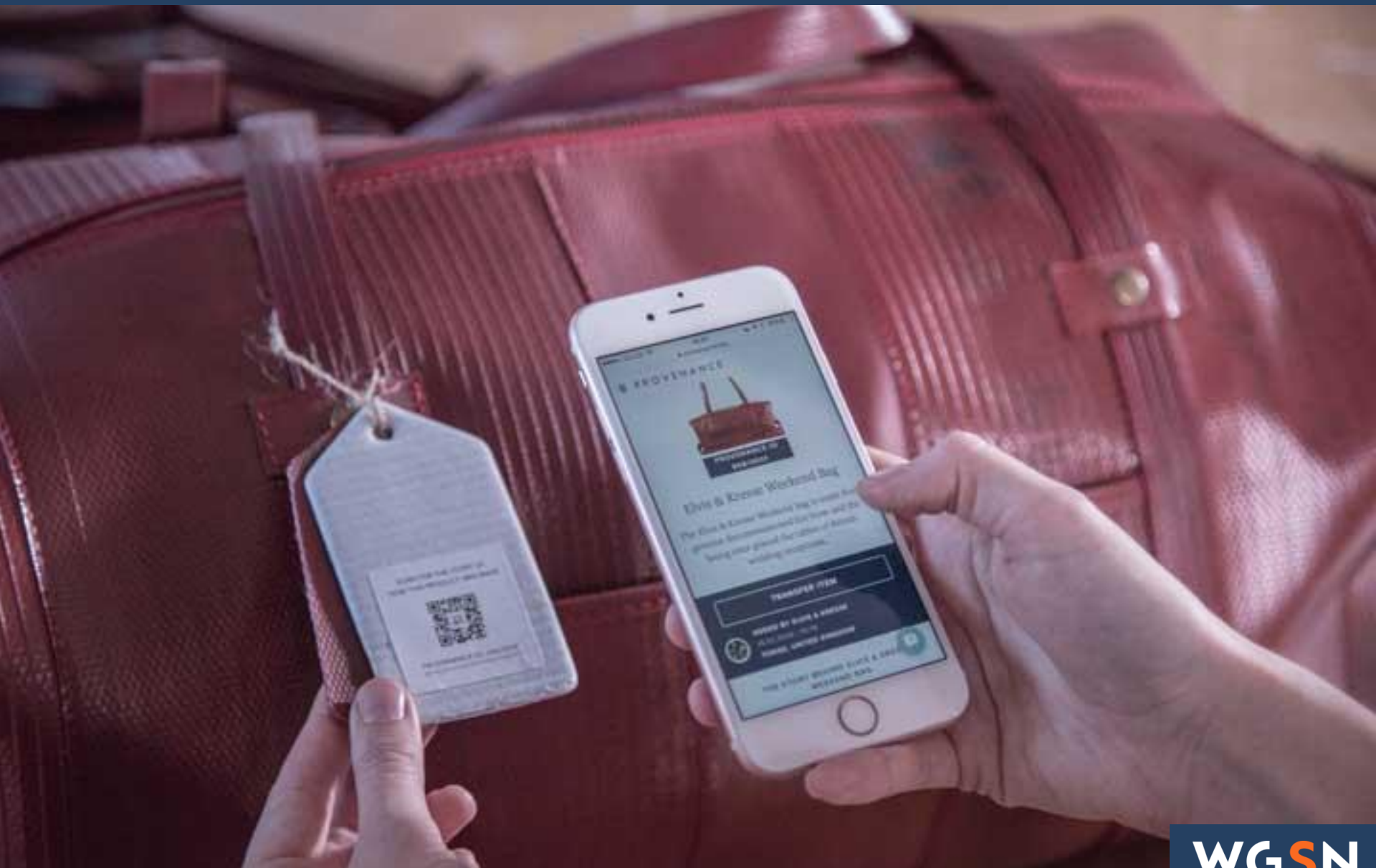
# Transparent Pricing

We believe customers have the right  
to know what their products cost to make.



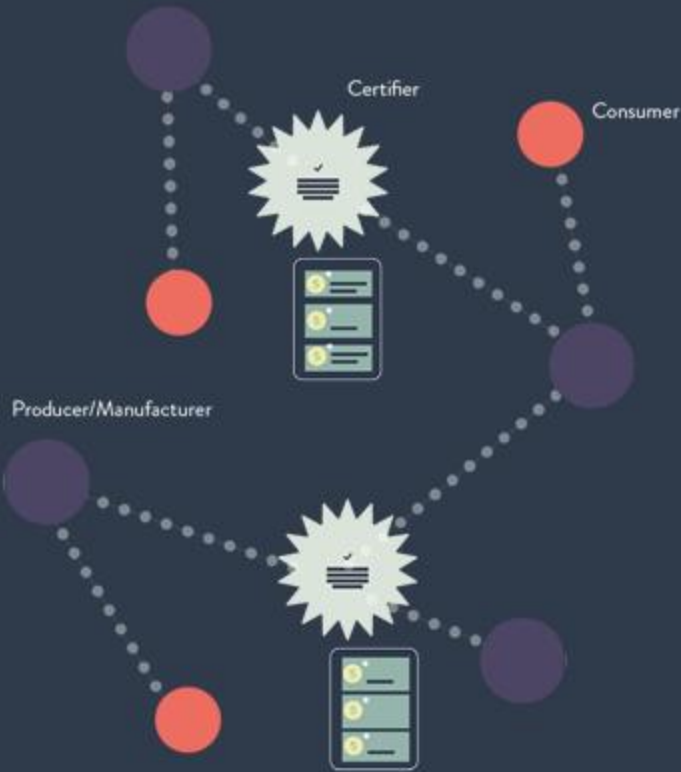


THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PRIORITIES 2018: TRANSPARENCY

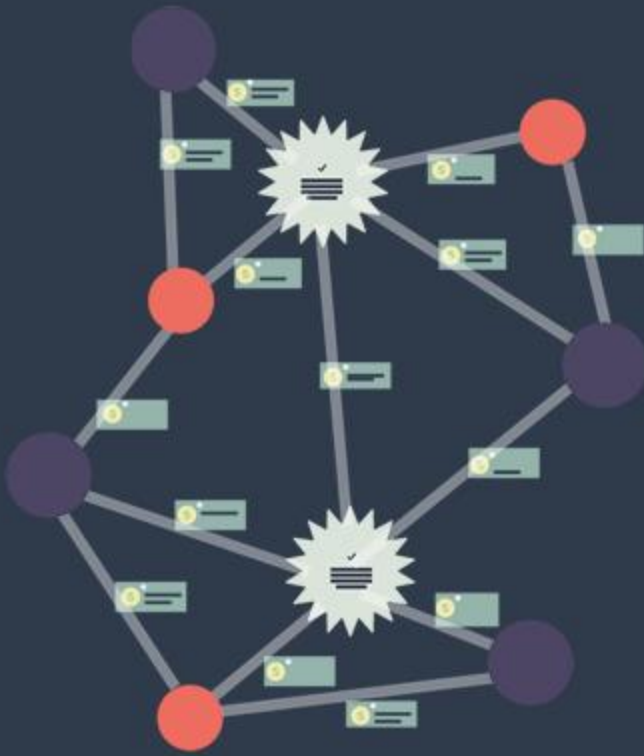


THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PRIORITIES 2018: TRANSPARENCY

CERTIFICATION ACCESS TODAY



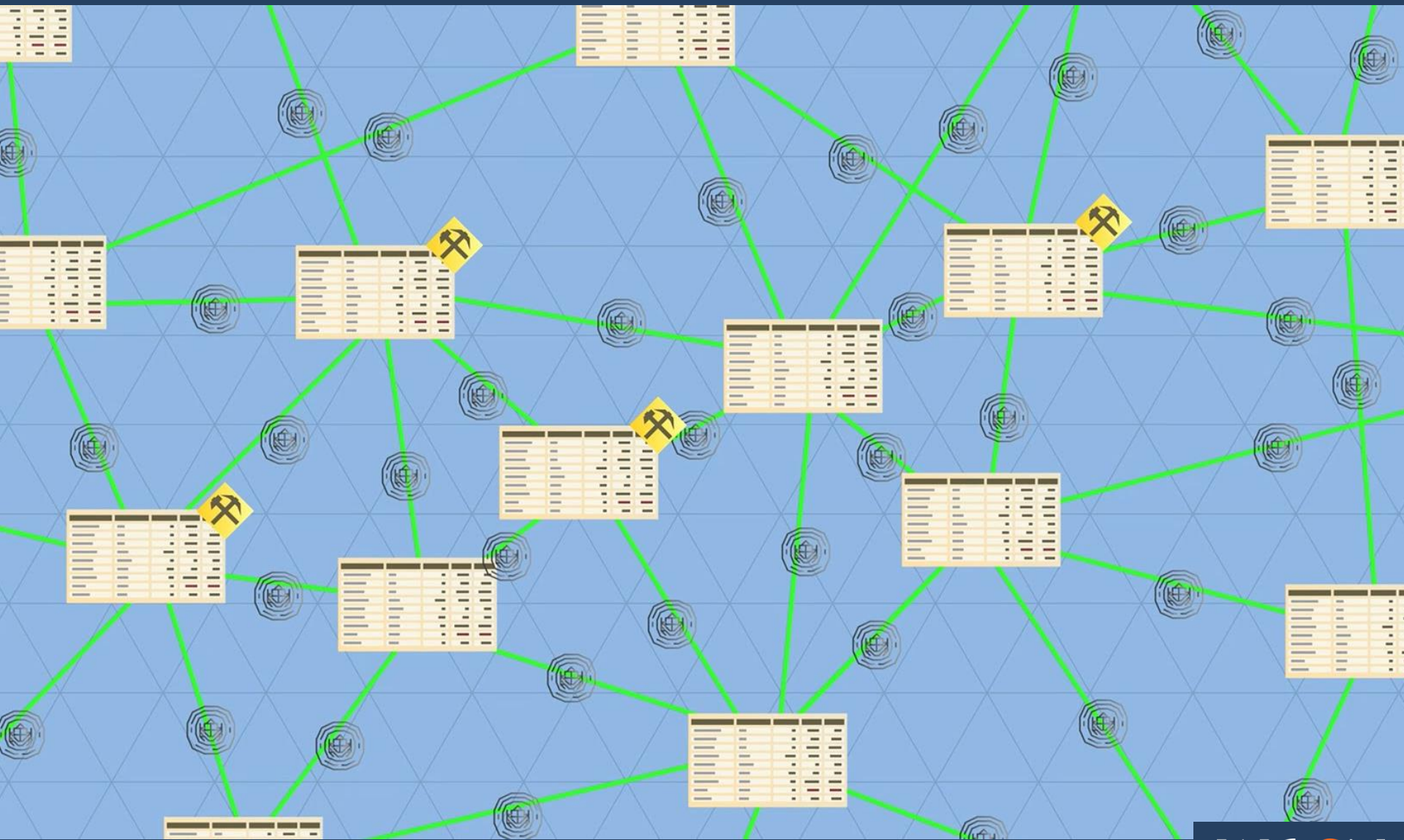
THE FUTURE



*With blockchains data can be accessed and verified by all actors, rather than solely by the original certifier.*



THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PRIORITIES 2018: TRANSPARENCY



THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PRIORITIES 2018: TRANSPARENCY



WGSN

Bitpay.com | Credit Cards: 3% charge average vs Bitpay: 1% flat charge





**Some 70% of US shoppers use their mobile phones in-store.**



**The number of consumers globally that say they 'always look out for special deals and offers' rose to 71% in 2015, from 66% in 2014.**



## 100% PREMIUM LINEN SHIRT

*Made with 100% French linen that has been a part of international textile traditions for thousands of years, these shirts broadcast a timeless sophistication.*

**£29.90**



**In 2015, 47% of retailers put price transparency in its top 3 pricing pressures, compared with just 24% in 2014.**



## 100% PREMIUM LINEN SHIRT

*Made with 100% French linen that has been a part of international textile traditions for thousands of years, these shirts broadcast a timeless sophistication.*

£29.90



**Cost transparency could lead to  
44% increase in sales.  
Harvard Business School**





THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PRIORITIES 2018: TRANSPARENCY



MATERIALS: \$71.57



LABOR: \$69.95



TRANSIT: \$7.29



DUTIES: \$8.92



TOTAL COST  
\$157.73

OLIVER CABELL  
\$ 285

TRADITIONAL RETAIL  
\$ 1,695

**THE FUTURE CONSUMER: BEHAVIOUR CHANGES**  
**PRIORITIES 2018: TRANSPARENCY**



**WGSN**

**Cohn & Wolfe | 63% would choose an authentic brand, 59% tend to recommend them**



THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PRIORITIES 2018: TRANSPARENCY



I want the shirt Taylor Swift is  
wearing on the 1989 album cover 🤩

MQ

Our search will be swift 😊



**THE FUTURE CONSUMER: BEHAVIOUR CHANGES**  
**PRIORITIES 2018: TRANSPARENCY**



**“It’s very hard for brands to get away with not being authentic. It’s a key driver for trust and belief between brands and consumers... Authenticity is the only way to scale, because brands will change and evolve, but values will stay the same.”**

**WGSN**

**John C Jay, President of Global Creative, Fast Retailing**

THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
**PRIORITIES 2018: LIFE ON DEMAND**



**WGSN**

2014: \$4.1 bn funding on-demand apps (+514% YOY) | 2015: 198 venture investors vs 20 in 2010



A woman with blonde hair, wearing a white short-sleeved shirt and a pink skirt with a geometric pattern, is standing on a city street. She is holding a red smartphone in her hands and looking at it. She is also carrying a yellow bag and a black belt. The background is blurred, showing other people and a city street.

**“34% of all US online retail purchases happen on mobile.”**

THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PRIORITIES 2018: LIFE ON DEMAND



WGSN

movile.com | 15 Offices: Brazil, Mexico, Colombia, Argentina, US | \$55 m in funding



## THE FUTURE CONSUMER: BEHAVIOUR CHANGES PRIORITIES 2018: LIFE ON DEMAND



**WGSN**

eMarketer | 2018 LATAM: 219.9 million smartphones





**Last Christmas 2015,  
32% of consumers used  
click-and-collect;  
69% of those shoppers  
adding to their purchase  
once in store.**



UBER RUSH



# IMPRESS YOUR CUSTOMERS WITH ON-DEMAND DELIVERY

WATCH VIDEO ►

WGSN



**SAME DAY DELIVERY**  
*the new delivery standard*



THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PRIORITIES 2018: LIFE ON DEMAND



WGSN

[www.starship.xyz](http://www.starship.xyz) | Ahti Heinla, CEO | Last Mile Delivery Cost: £3/£7 > £1 | 30 min delivery



**Boston Consulting Group estimates that robots will complete around 25% of all tasks in the manufacturing sector by 2025**





THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PRIORITIES 2018: LIFE ON DEMAND



WGSN

Trunk Club



How much do you usually spend on these items?

Most of the items you'll see on Thread are tailored to you:  
your preferences, tastes, sizes, existing wardrobe,  
and importantly, your budget.

£

££

£££

££££

You can adjust your budget individually:







**THE FUTURE CONSUMER: BEHAVIOUR CHANGES**  
**PRIORITIES 2018: LIFE ON DEMAND**



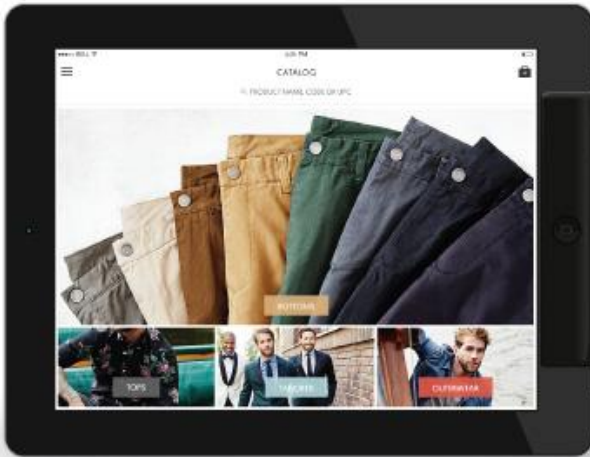
**WGSN**

**71% of UK shoppers believe they know more about a retailer's products and services than their store associates**

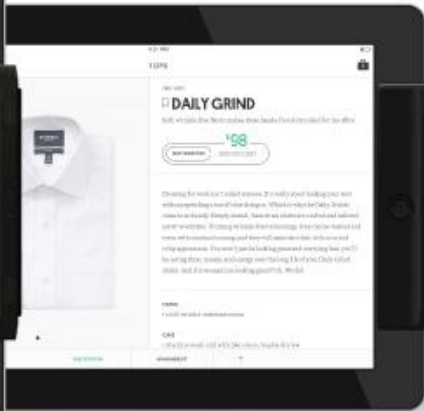


# THE FUTURE CONSUMER: BEHAVIOUR CHANGES

## PRIORITIES 2018: LIFE ON DEMAND



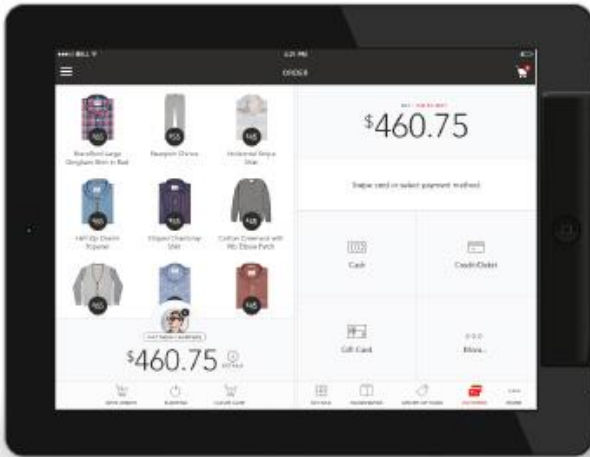
Product Catalog



Product Details



Look Building



Omnichannel Transactions



Clienteling



Customer Manager



THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PRIORITIES 2018: LIFE ON DEMAND



WGSN

True Religion



## THE FUTURE CONSUMER: BEHAVIOUR CHANGES PRIORITIES 2018: NO LABELS



**WGSN**

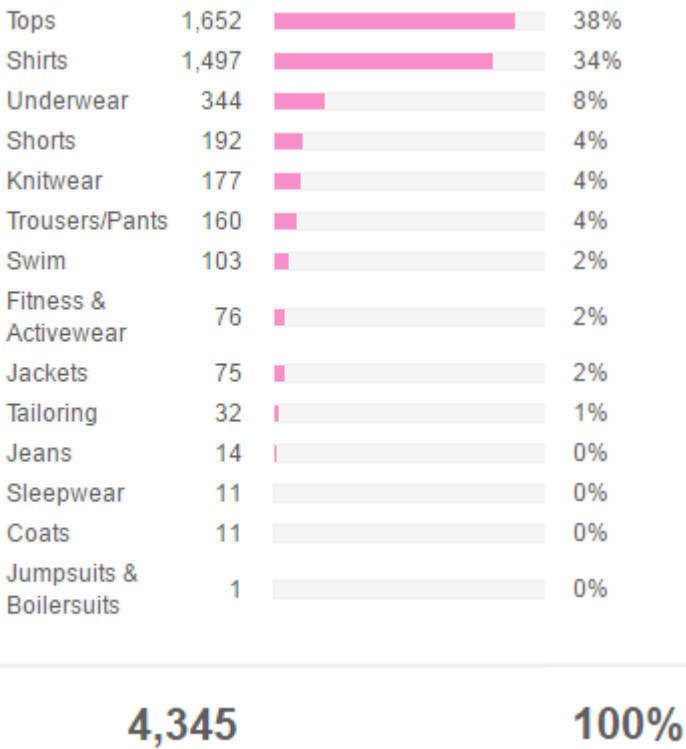
Intelligence Group | 14-34 y.o. survey: 60% think gender lines have been blurred

**65% of men over the age of 65 say that they are 'completely masculine', while only 28% of men aged 30-44 and 30% of men aged 18-29 say the same.**

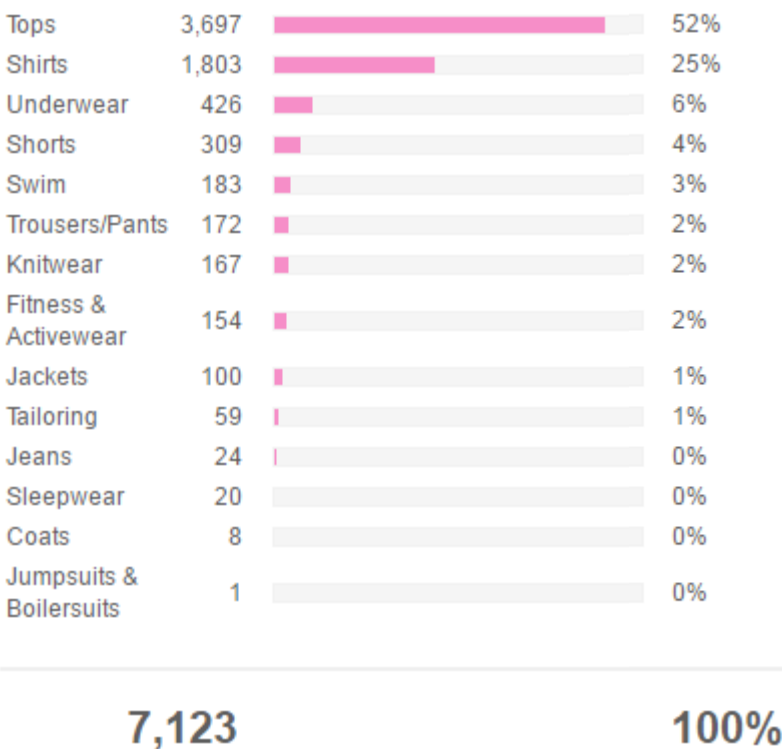




S1 2015



S1 2016



## THE FUTURE CONSUMER: BEHAVIOUR CHANGES PRIORITIES 2018: NO LABELS



**WGSN**

Genderless Brands | Knitwear & Denim | NattoFranco | Daimorf  
Gucci | Fendi | Youasme Measyou | Unmade | Ader Error | Senyor Pablo | Heich es Heich | Anderson Bell



**THE FUTURE CONSUMER: BEHAVIOUR CHANGES**  
**PRIORITIES 2018: NO LABELS**



**WGSN**

**Genderless Brands | Knitwear & Denim | Moses Gauntlett Cheng**  
**69 Worldwide | Bethnals | Wood Wood | Phlemens | Bianca Chandon | Lilful | Yeezy | Shan Huq | Vejas**

**THE FUTURE CONSUMER: BEHAVIOUR CHANGES**  
**PRIORITIES 2018: NO LABELS**



**By 2020 more than 40% of the American workforce will be freelancers, contractors or temporary employees (60 m). The online staffing exchange is expected to reach \$5b in annual spend in 2018.**

**WGSN**

**Hyphenated-careers**



**THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PRIORITIES 2018: NO LABELS**



**WGSN**

THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PRIORITIES 2018: NO LABELS



WGSN



## THE FUTURE CONSUMER: BEHAVIOUR CHANGES PRIORITIES 2018: NO LABELS



**"I think terms labelling the style of clothing are needed, but a whole separate term just based off sizes? When you walk into a store, you will never see a section labeled 'straight' or 'standard' size."**

**WGSN**





- **60.9% of plus-size consumers prefer to shop a retailer's core offer rather than a specific plus-size sub-brand.**
- **Approximately 2/3 said they wanted to see plus sizes in the same section as other sizes.**
- **60% reported feeling embarrassed having to shop for clothes in a separate store or department.**



**THE FUTURE CONSUMER: BEHAVIOUR CHANGES**  
**PRIORITIES 2018: NO LABELS**



**Teens buying plus-size:  
from 16% in 2010  
to 34% in 2016  
NPD Group (US)**

**WGSN**

**UK: expected growth of 23.8%, up to £6.4bn , between 2015 and 2019**

**US: sales of apparel size 14+ rose from 17.4 bn in 2013 to 20.4 bn in 2016 (17%) | All apparel: 7%**

**THE FUTURE CONSUMER: BEHAVIOUR CHANGES**  
**PRIORITIES 2018: NO LABELS**



**WGSN**

**Plus-Size Brands**

**PLY | Universal Standard | Beth Ditto | Eloquii | Melissa McCarthy Seven7 | Torrid | BooHoo | Asos Curve**



## THE FUTURE CONSUMER: BEHAVIOUR CHANGES

### PRIORITIES 2018: NO LABELS



**In 2015, 45% of shoppers spent money on personalising a product or experience. Consumers are happy to pay up to 150% more for custom items.**



**THE FUTURE CONSUMER: BEHAVIOUR CHANGES**  
**PRIORITIES 2018: NO LABELS**



**24% of consumers like packaging that has an appealing design dedicated to a limited-edition, seasonal or special release.**



**WGSN**



“

WE'VE GONE FROM MASS MARKETS TO MARKET  
SEGMENTS TO MARKET NICHEs TO MICRO NICHEs TO  
MARKETS OF ONE.

”

- KELLY MOONEY, CEO, RESOURCE/AMMIRATI



A woman with long, straight, reddish-brown hair is shown from the back, wearing a white long-sleeved button-down shirt and a black skirt with a large bow at the waist. Her right hand is in her pocket. The background is split: the left side is a solid light gray, and the right side is a blurred, warm-toned image of the same woman from the front, creating a sense of depth and duality.

# CONSUMER PROFILES



**THE FUTURE CONSUMER: BEHAVIOUR CHANGES**  
**PROFILES 2018: THE MOMENT MAKERS**





THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
PROFILES 2018: THE NEW EXPRESIONISTS



WGSN



**THE FUTURE CONSUMER: BEHAVIOUR CHANGES**  
**PROFILES 2018: THE CONSCIOUS CREATIVES**







# GAME CHANGERS





## THE FUTURE CONSUMER: BEHAVIOUR CHANGES

### ACTIVATION MARKETING



**In the US, Activation Marketing accounts for nearly 60% of advertisers' budget. Projected value of \$740 bn by 2020.**

**WGSN**

**Nike, Milan Design Week 2016**



## THE FUTURE CONSUMER: BEHAVIOUR CHANGES

### IMMERSIVE MARKETING



**VR is predicted to be a \$30 bn market by 2020**

**WGSN**

**Tommy Hilfiger, NYC | Kevin Kelly, Wired**

## THE FUTURE CONSUMER: BEHAVIOUR CHANGES

# CORPORATE AMNESIA

An aerial, top-down view of a large office space. The floor is a light grey. There is a grid of white rectangular desks. Most desks are empty, with only a chair and a small trash can. A few desks have people sitting at them, working. The people are small figures, some wearing different colored shirts (blue, orange, white). The overall impression is one of a large, impersonal, and somewhat empty corporate environment.

**30% of Companies lose +15% Millennial workers within a year.  
The median tenure for a Millennial employee is 2 years  
(7 years for Baby Boomers).**



## THE FUTURE CONSUMER: BEHAVIOUR CHANGES

### SUCCESS METRICS 2030



**Many stores won't sell product in 20 years' time.  
Success metrics will be customer experience per square metre,  
active participation, social interaction, and staged product ratings.**

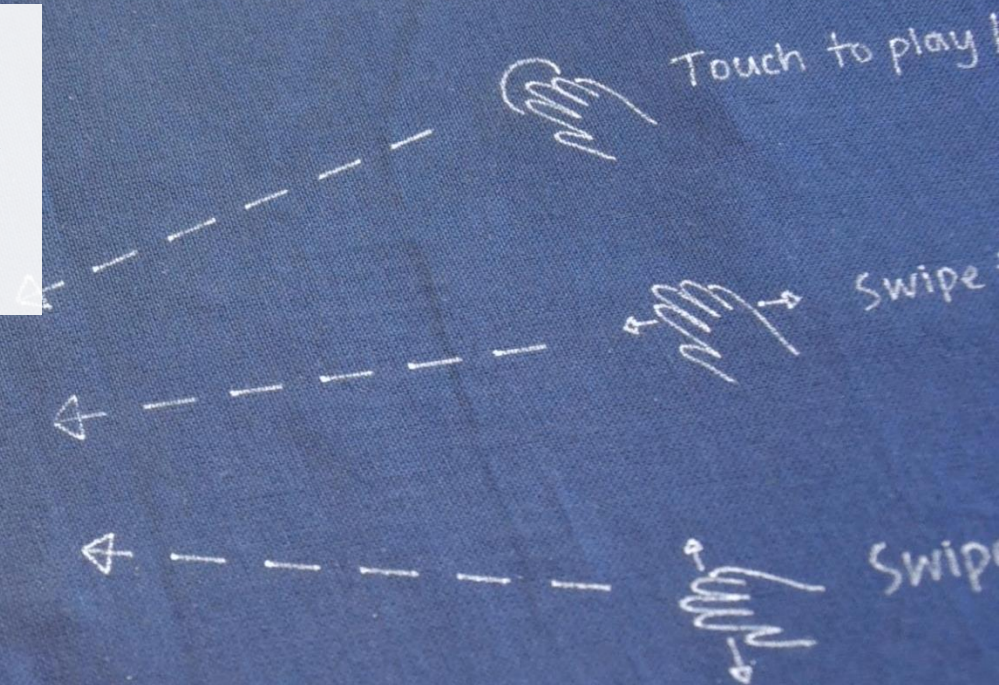
**WGSN**



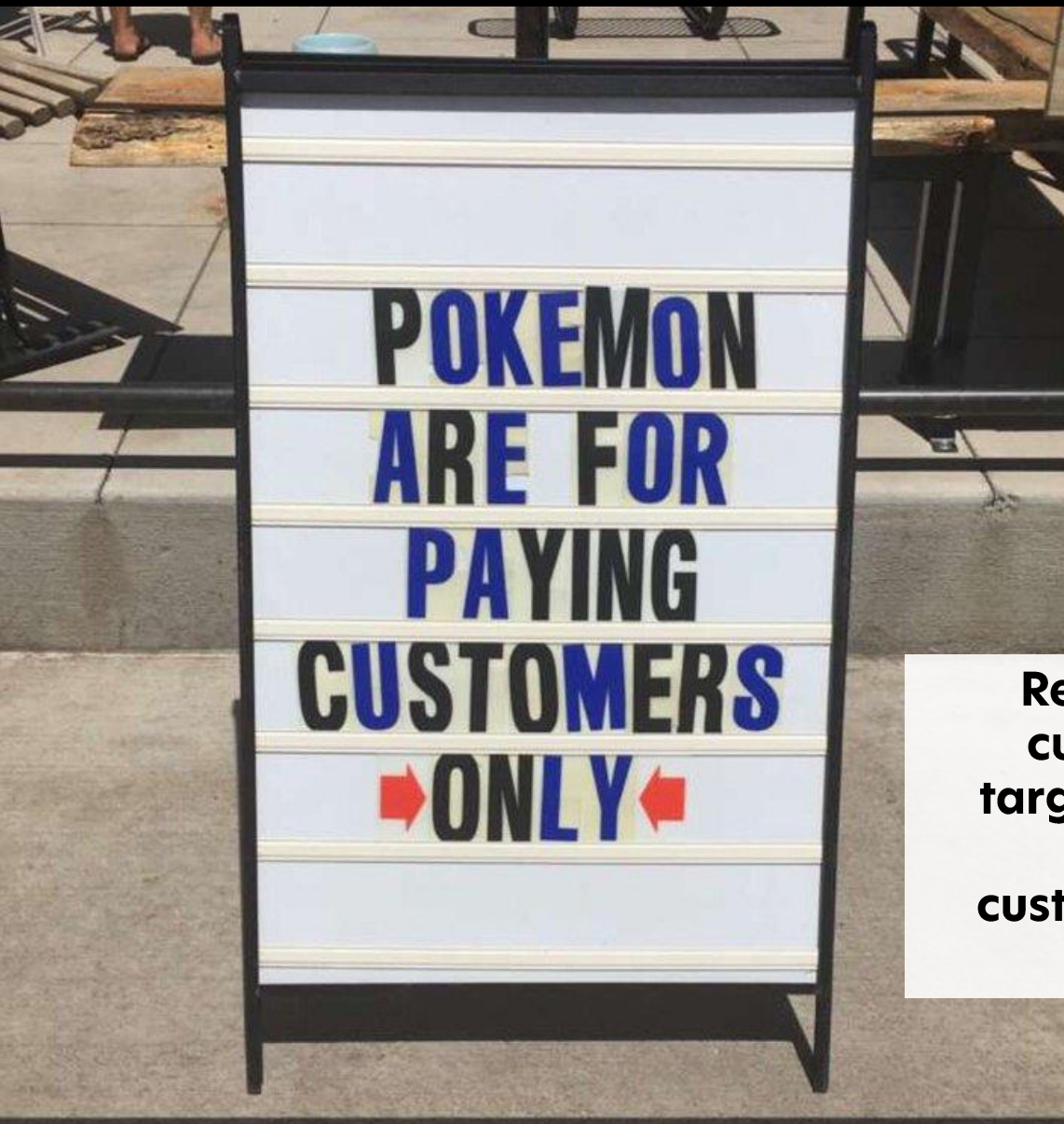
# CONTROLLING YOUR DEVICES

**Today, 6% of adults own a piece of wearable technology.  
It took 18 months for tablets to grow from 5% to 25%.**

**You Gov**







**Retailers need to focus on which customer they were serving and target the sales per customer, and identify their most profitable customers and offer them a better experience.**

THE FUTURE CONSUMER: BEHAVIOUR CHANGES

# CONVERSATIONAL COMMERCE + BOTS



6 May  
14:25

Key Pieces for the New Season

These versatile, key pieces are perfect for the new season as the weather gets warmer! I have included some fun printed pieces and nice soft shades to lighten your colour palette for Spring/Summer.

Inspired by ↘



6 May  
14:25

Sit back, take a look, read my style notes, and let me know your thoughts on each piece :)

"So this is a little bit of a wildcard as I know..."



M&S COLLECTION  
Denim Jumpsuit  
£45.00

"So I bought this at the weekend and I have been..."



BEST OF BRITISH FOR M&S COLLECTION  
Cotton Rich Breton Striped Long...  
£29.50

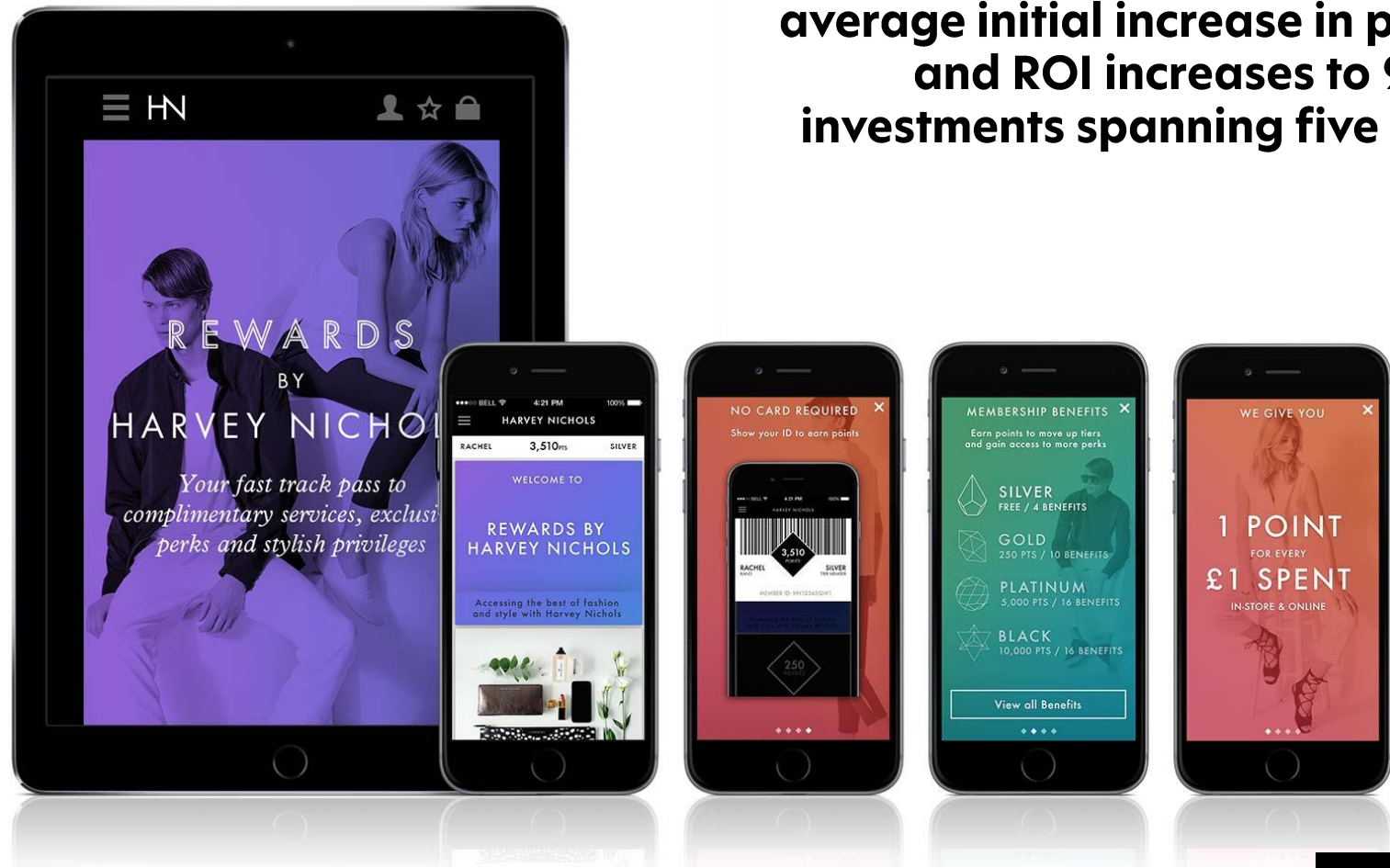
"Mules are going to be everywhere this season..."



AUTOGRAPH  
Stain Away™ Suede Block Heel...  
£49.50



Investing in big data yields a 6% average initial increase in profits, and ROI increases to 9% for investments spanning five years.



## THE FUTURE CONSUMER: BEHAVIOUR CHANGES

### BEACON TECHNOLOGY



**44% of airlines will use beacon technology by 2018, up from the 9% of airlines actively using beacons in 2015**

**WGSN**

**SITA, Air Transport Technology Firm | Barneys New York, True Religion, Harvey Nichols, M&S**



# THE FUTURE CONSUMER: BEHAVIOUR CHANGES HYPHENATED BUSINESS

## UNDER ARMOUR CONNECTED FITNESS™

The definitive health and fitness network dedicated to helping you lead a healthier life. Track, analyze, and share your fitness activity with the world's first social network for athletes and fitness enthusiasts.



**Think about the life of the consumer. Learn from today's tech start-ups.**

**WGSN**

**WRC 2016 | BS Nagesh, Vice Chairman, Shoppers Stop (India) | Under Armour App: 160 m users**



THE FUTURE CONSUMER: BEHAVIOUR CHANGES

# HYPHENATED RETAIL



Pogledite  
[www.alpstories.hr](http://www.alpstories.hr)



Oslabite proizvod  
i satopite



Kreirajte svoju  
etiketu

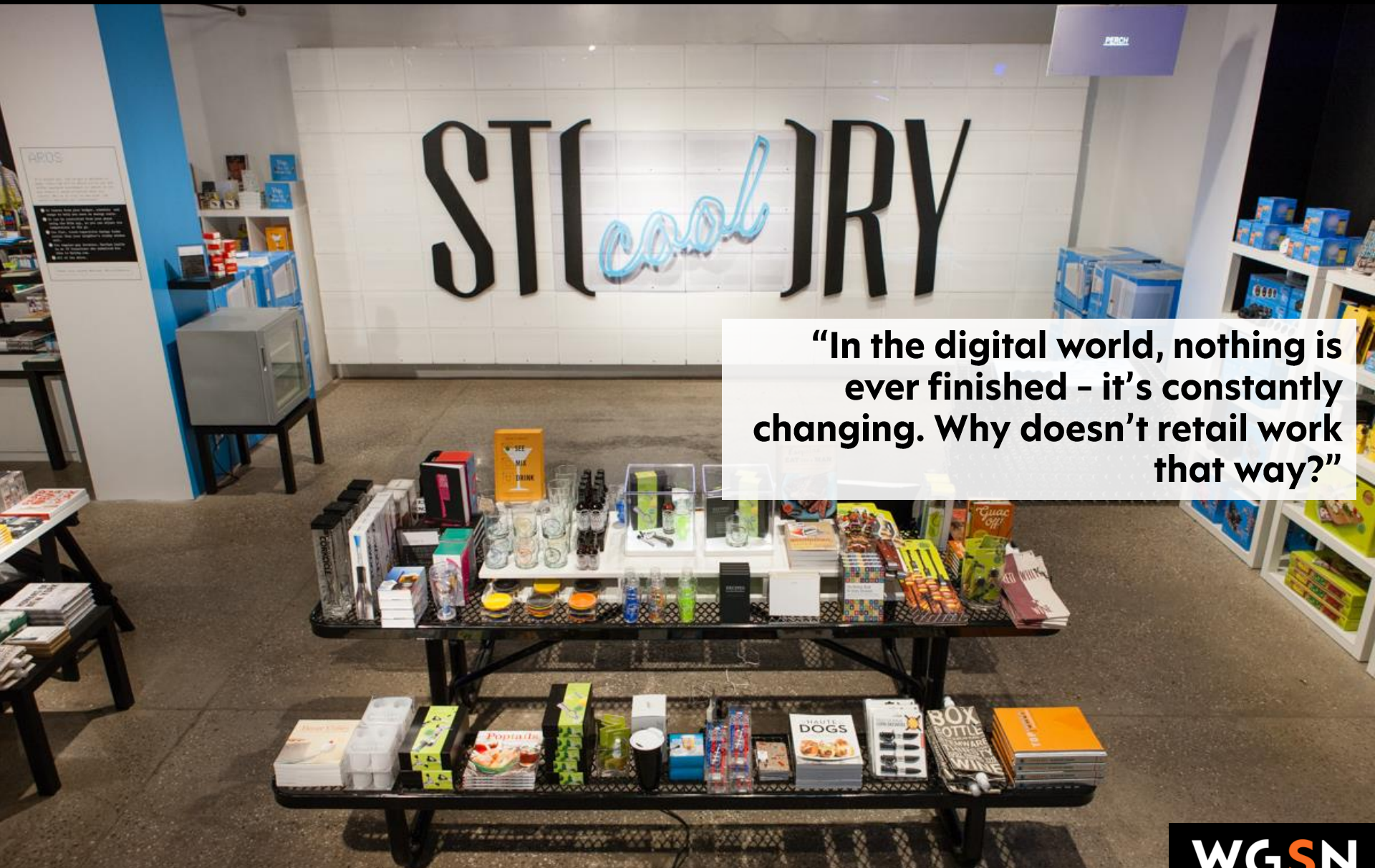
**WGSN**

AlpStories, Zagreb, Croatia



# THE FUTURE CONSUMER: BEHAVIOUR CHANGES

## FLUID RETAIL



**“In the digital world, nothing is ever finished - it’s constantly changing. Why doesn’t retail work that way?”**

**WGSN**

THE FUTURE CONSUMER: BEHAVIOUR CHANGES

# FLUID RETAIL



FITCH

WGSN



**“We’re used to a rhythm in retail where projects usually last 6 months. Imagine reducing that to 6 hours. That’s what we’re trying to do in our Explorium: we’re experimenting with rapid prototyping, teaching ourselves how to move fast, like a start-up.”**





**in 2013, Siri understood 55% of what users said.  
By autumn 2015, Siri understood 95% of  
inquiries.**



WGSN CATWALK GALLERY

Women ▸ Autumn/Winter 2016 ▸ All Cities ▸ Designer Search

LONDON  
Autumn/Winter 2016  
**BURBERRY PRORSUM**  
WOMEN + MEN

- View Complete Collection
- Download Collection
- Print Collection
- Details



Collections

Burberry Prorsum

Designers A-Z

SEP 15 Tim Coppens x Under Armour

SEP 14 Ralph Lauren

SEP 12 Opening Ceremony

SEP 10 Rebecca Minkoff

SEP 09 Tom Ford

Tommy Hilfiger

THE FUTURE CONSUMER: BEHAVIOUR CHANGES  
SEE NOW, BUY NOW



KNITTED UTILITY

The heavy woven fabrics of utility styles are replaced with jerseys, offering a softer approach to heritage designs. Warm tones of ginger and evening sand accentuate this soft approach, which is particularly relevant for young women's casualwear. Look to *Nettofranco's* knitted cargo-pocket pants for inspiration.

- **Market** : Women, Young Women
- **Drop** : Autumn Transitional





## FAST FASHION / MASS MARKET

Ascena Retail Group:

Ann Taylor, **Lane Bryant**, **Justice**

Forever 21

Primark

Fast Retailing: **Uniqlo**

E Land World (South Korea)

## DEPARTMENT STORES

Coppel

Lojas Americanas (Brazil)

Chongqing (China)

Central (Thailand)

Woolworths Holdings (South Africa)

Falabella (Chile)

## ACTIVEWEAR

**Nike**

Academy Sports + Outdoors

Sports Direct International (UK)

Belle International Holdings (HK)

## LUXURY

Prada Group

LVMH

Ralph Lauren

Hermés

# FUTURE CONSUMER 2018

WGSN





# KEY TAKE AWAYS

---

- **We are living in fluid times empowered by technology and communication; we can't just be fast, we have to learn to be fluid.**
- **In a changing environment, standards will have to change.**
- **2017 will bring ground breaking changes that will be maturing by 2018.**
- **In 2018 consumers will value more than ever: sustainability, transparency, immediacy, and the freedom to be themselves.**

# FUTURE CONSUMER 2018

WGSN





# WGSN | LIFESTYLE & INTERIORS

The pioneering lifestyle and interior design trends service for the world's consumer industries, helping inform great product design and business strategies.

Fashion / **Lifestyle & Interiors** / Instock / Styletrial / Mindset / Futures

**wgsn.com**

# WGSN | INSTOCK

The big data retail analytics product for buyers, merchandisers and strategists to ensure your range is packed with winners at the right price at the right time.

WATCH VIDEO ►

Fashion / Lifestyle & Interiors / Instock / Styletrial / Mindset / Futures

**wgsn.com**



# WGSN | STYLETRIAL

Harness the “wisdom of the crowd” to help you assess the market potential of your product as seen by your target customer.

WATCH VIDEO ►

Fashion / Lifestyle & Interiors / Instock / Styletrial / Mindset / Futures

**wgsn.com**



**WGSN | INSIGHT**

**wgsn.com**



**WGSN** | FUTURES



# THE VISION 2030

**wgsnfutures.com**

**NYC | November 10, 2016**

## How To Drive Engagement On Sina Weibo, China's Alternative To Twitter



BY WGSN INSIDER

With a close to a quarter million followers on Sina Weibo guest blogger Monki Yuki shares three tips for effectively building a following.

[wgsn.com/blogs](http://wgsn.com/blogs)

## Three models discuss the term 'plus size' and fashion's relationship with it



BY LOURDES LINARES

Our WGSN West coast editor sat down with three key players in the plus industry and asked the question of the moment: 'How do you feel being referred to as Plus-Size in 2016?'





**2 Mexicos McKinsey**



Google Search

I'm Feeling Lucky

Google.com.mx offered in: [Español \(Latinoamérica\)](#)

# *A two-speed economy ...*

Productivity has grown **5.8%** a year in large modern firms  
but has fallen **6.5%** a year in traditional firms

Small traditional firms were **28%** as productive  
as large modern ones in 1999, **8%** in 2009

## *... slows down growth*

**0.8%** average rate of  
productivity growth from 1990 to 2012

Wages in traditional firms fell  
**2.4%** a year from 1999 to 2009

**McKinsey  
& Company**

Manufacturing in Mexico is **24%**  
as productive as in the United States, even  
though top plants exceed the US average



**WG-SN**

**THANK YOU!**



**WGSN**

**THANK YOU!**

**Saul.LopezSilva@wgsn.com**

**TEL: +1 212 201 2820**

**CEL: +1 917 214 8171**

