Augmented Humanity

Introduction

As we approach a new decade, the world is primed for change.

Businesses are at a challenging, but exciting, frontier full of opportunity - and the consumer is here to help roadmap the way.

Welcome to the age of the empowered consumer.

Where businesses were once closed-off, exclusive and protective, customers are now actively invited to input, co-create and shape them. Where brands would entice people into store, they now go to where the customer is - online, in transit, at home. What’s more, this empowered consumer is also challenging businesses on their practices and holding them to account whether it’s how customer data is managed, how advertising represents diverse audiences or how processes contribute to sustainability (or not). This is creating an evolving business culture dominated by listening over instructing which permits brands to become more intimately involved in the wider issues that affect their customers lives. Marketing success has evolved beyond simply changing consumer behaviour - good marketing will also evolve brand behaviours, co-shaped by the consumer.

There has been a transfer in the concept of value as businesses seek to monetise that precious asset - attention, enticing people to spend time in their ecosystems.

In a landscape where any business can compete on a desirable product, and consumers move from ownership to access - value added experiences will be what creates differentiation.

Creative Experiences are now platforms for companies. Technology has become less about tethering ourselves to a new gadget or adding more features and more about the experiences it enables us to have.

With creativity, brands have expanded from product silos into experience ecosystems comprised of products, services and content that work together to holistically enhance the customer’s lifestyles and reinforce the business’ purpose.

Whether retail, media, entertainment, finance, fashion or healthcare, all businesses are now in the business of experiences.

More than ever, creativity and experience has become a brand’s greatest differentiator and is a strategic imperative for business transformation. For success in 2020, global marketers need omni-channel experiences driven by ideas, powered by tech and differentiated by creativity at every touchpoint of the customer journey.

Augmented Humanity defines how humanity can work in harmony with technology to expand and enrich life. The term is an aspiration for brand experiences to enrich lives, enhance human experience and power sustainable progress - benefiting people, profit and planet. 2020 brings great challenges but also a wealth of transformative technologies, new opportunities and space for creative exploration and purposeful change.

Isobar’s annual Augmented Humanity report is assembled to inspire with the possibilities and find opportunities in the challenges. It provides strategic thinking and inspiration that will enable global marketers to achieve success in 2020 through idea-led experiences that can deliver growth in the coming decade.
Five themes for 2020

We’ve highlighted five platforms for working towards Augmented Humanity in 2020. In each chapter we’ll cover evolving trends, key action points for businesses and brands and showcase best-in-class examples of these trends in action.

The first four subsections within each theme are key action points, the fifth subsection is a nascent or emerging one-to-watch trend to explore in the coming years.

1. Augmented Experiences
   How technology is enhancing the physical world to create unexpected and joyful experiences

2. Humanising Data
   How data sets, algorithms and AI are ‘humanising’ with emotion and personality

3. Socialised Commerce
   How technology is putting people at the center of how we search, shop and share

4. Digital Kinship
   How technology is helping to find and foster meaningful communities for everybody

5. Post-purpose Activation
   How technology is empowering brands to rediscover and activate their purpose for impact
1. Augmented Experiences
1. Introduction

“The goal is for technology to enhance life without getting in the way of it. By integrating into our surroundings, serving our needs, enriching experiences and making our lives more delightful.”

Ronald Ng — Global Chief Creative Officer, Isobar

In 2020, science fiction author Arthur C. Clarke’s oft-referenced quote, “any sufficiently advanced technology is indistinguishable from magic” becomes a directive for design and technology as the capacity to turn techno-fantasies into a reality becomes within reach.

Internet-of-things connectivity, augmented reality overlays, geo-location-specific content and sensors are already making our world appear ‘alive’ with data and content. In the coming decade, these technologies will be transformed as physical devices and wires are diminished. Humans become the interface for new types of seamless experience where individual, object and surrounds appear to “talk” to each other in a revolution called ‘ambient computing’. “UI” evolves from User Interface to User-as-Interface be it through touch, voice or location becoming triggers for awakening objects, animating surfaces or activating environments - and therein lies the magic.

Further still the magic lies not in the subsequent speed, convenience and reduced interruption but the ability to engineer truly elevated, emotional, entertaining and memorable experiences that leave a lasting impression be it at home, commuting or in a retail environment.

Ambient computing will augment the human experience of the world through initiatives that refocus our gaze from screen to the outdoors with content that informs, delights and enhances. We will see the steady layering of technology across the physical landscape of our lives - our environments will become more alive with technology and our lives will become augmented in the most literal sense.

How can ‘Augmented Experiences’ augment humanity? It...

- Develops balanced relations between digital and outside worlds
- Imbues the world with a liveliness that entertains, informs and surprises
- Evolves the role of the audience as passive viewer to active participant at the centre of the experience
- Creates opportunities to heighten our existing experiences and create new ones - the overlooked is made visible, the mundane more magical
Ambient Literature is another example of ‘enchanting’ the electronics in our pockets through a blend of location tracking and content. A research project between U.K. universities UWE Bristol, Bath Spa University, and the University of Birmingham, Ambient Literature uses GPS, weather and other geographical data from the mobile handset to create immersive fiction for adults that responds directly to your surroundings. Central to the success of the project is that the content is created to maximise the capabilities of the technology.

Both projects also offer creative strategies for reconciling the disconnect between screen and real world interactions creating digital-physical experiences that enhance each other. This will prove all the more important as the youngest generational cohort, Gen Alpha show signs of a more balanced relationship with their devices. 

“With the app we stimulate the imagination of kids and create a fun and interactive experience for the whole family. Through a custom story-engine, the app builds stories in real-time around ordinary highway objects. For example, a story turns a tunnel into a rocket launcher. With this app we want to give children the ability to trigger their creative thinking skills, which are essential to self-discovery.”

Daniel Sytsma — Chief Design Officer, Isobar EMEA
1.2 Gestural Interactions

How we physically interact with computing will fundamentally shift as we graduate from the pinch, swipe and click that have defined our interactions to date to the ‘Natural User Interface’ (NUI) that operates via gesture, voice, gaze and potentially brain activity.

Gestural interfaces will start to permeate the masses from 2020 as tech’s big players create market-ready products fueling the global gesture recognition market that is set to reach around US$48.56 bn by 2024, rising from US$11.60 bn in 2015⁴.

Google’s latest Pixel 4 smartphone features Motion Sense technology developed by its Advanced Technology and Projects (ATAP) division. The phone uses Google’s proprietary Project Soli miniature radar technology to detect human motion enabling the user to switch song, silence an alarm or awaken the screen using hand movement. As well as human-made gestures, objects can also be designed to generate gestures of their ‘own’. Microsoft Research’s Project Zanzibar is a flexible, portable mat that can sense and track physical objects, identify what they are, and allow interactions through multi-touch and hover gestures. The physical mat can sync with digital content creating a gesture-fuelled interactive tool for education, play and gaming.

Gesture has the ability to improve the technology experience by creating a more intuitive, fluid means of interacting with it.

Oblong Industries is powered by spatial computing pioneer John Underkoffler, the researcher who developed the iconic gesture-activated computers in Minority Report - arguably the pop-cultural reference from which all interactive computing visions are measured. Oblong is turning data into physical objects that can be manipulated using a ‘wand’ tool. Its flagship ‘Mezzanine’ collaboration tool re-invents the ‘conference call’ with multiple offices able to pull up content from any device on any screen, across countries.

Isobar created an experience combining both Enchanted Electronics and Gestural Interaction for property developer CapitaLand’s One Pearl Bank apartments. Potential buyers were invited to explore a showflat through a multitude of technologies that both excite and inform whilst reducing the need for the sales agent to repeat the same information to the buyer. Holograms surround customers with imagery and sounds of nature, and through conductive sensors and projection mapping they can choose what they wish to know more about by touching and triggering audio visual presentations along the length of the wall. Alternatively, they could speak with a voice agent within a smart mirror or download an e-brochure after exploring a giant virtualised book, as part of CapitaLand’s efforts to go green.

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What’s truly incredible is that all of this academic research and conceptual thinking has materialised into a very real, very powerful computing platform. The team at Oblong Industries is playing in the future every day. It’s really amazing technology.”

Dave Meeker
Global Chief Innovation Officer, Isobar
1.3 At-home Immersion

‘Immersive’ experiences have been largely the domain of cultural institutions and costly experiential campaigns. Now, immersive technologies be it virtual reality, projection or the multisensory have matured into accessibly priced, pocket-sized devices for domestic entertainment and enjoyment.

The “big brand” experience can now come to wherever the customer is.

Zaha Hadid Architects’ virtual reality division (ZHVR) has taken a version of a technology originally created for professional venues and scaled it down into a domestic listening experience. The Loop sound lounge partners the firm’s signature curvaceous design with sound design company L-Acoustics Creations to create an ultra-high resolution listening experience delivered across 24 channels. More accessible still, Wave is an ‘at home guided meditation experience you can feel’. It combines app-based audio with a responsive, haptic pillow that work in sync to create a holistic, at-home wellness experience.

Incorporating sensory elements is helping to amplify achieving a feeling of immersion. MICRO - UTOPIA: The Imaginary Potential of Home by London-based artist Paula Strunden is a location-based virtual reality experience which illustrates the potential of a truly augmented home where minimal furnishings come alive with digital content - hands are washed by ‘digital water’ and users crawl through virtual ‘fireplaces’ to enter different worlds.

Pocket-sized immersion will only increase as technology companies equip products with mixed reality (MR) ready devices. Apple’s 2020 iPhone release will purportedly be MR-ready equipped with a True Depth camera that can scan its surroundings using laser projection tech - laying the foundations for at-home immersive brand experiences at scale.

The VR, AR & MR arm of Isobar’s Innovation NowLab’s exist to provide end-to-end services for virtual, augmented and mixed reality experiences.

We have the ability to conceive, create and manage next generation content experiences from fully immersive experiences for custom hardware to highly scalable, lower-tech solutions for the mass market. Find out more here.

1.4 Storytelling Voices

We’re seeing the smart speaker evolve from functional assistant to a medium for new forms of storytelling between audience, object, fiction. As smart speaker sales reach a critical saturation point (estimated to jump from $700 million in 2016 to $3.5 billion by 2021), businesses can now justify investing in the platform as a medium for creating experiences that inform, entertain and surprise.

A true frontier in entertainment, kids (and big kids!) alike can break the fourth wall and enter their favourite shows, meeting characters and shape content. This year Isobar highlighted the magic of voice with an Alexa Skill and cinematic storytelling experience for Annapurna Pictures’ animation Missing Link. In Missing Link Adventures, six different stories, voiced by the real actors, make for an hour-long astonishing experience for fans. There are 15,000 possible journeys for users to engage with and as of August 2019 there were 103,000 interactions logged and counting.

This trend is going to gain momentum in 2020. At this year’s Voice Summit, Dave Isbitski, Amazon’s “chief evangelist” for Alexa and Echo, shared plans that they are investing in Skill Flow Builder, a tool designed to help creators of voice-fueled games map out stories. In 2020 we’ll start to see voice-controlled devices evolve from speaker-like units to the stuff of secret agents with wearables including Amazon Echo’s range of Echo Loop Ring, Echo Frames Glasses and earbuds transporting the power of voice on the go.

This ‘characterisation’ of smart speaker devices will by default create more diversity in the voices people hear through their devices, a factor of increasing importance in response to concerns around gender and dialectal biases inherent in the software. Refer to Q, the world’s first genderless voice, built in riposte to binary perceptions of gender (see also: 5.4 Tech for and by everybody).

The Voice arm of Isobar’s Innovation NowLab uses Artificial Intelligence technologies like Natural Language Processing to create conversational interfaces for customer service and creative applications alike. Find out more here.

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At the recent SynBioBeta Conference in San Francisco, former Google CEO and current technical advisor Eric Schmidt projects that biology will undoubtedly fuel computing.

A future-facing evolution of User-as-Interface and one possible trajectory of Wearable Technology are tech experiences that put human biology at the centre of the computing experience.

At the accessible end of this revolution, wearables are evolving from generalist metrics to hyper-specific tracking that can augment your experience of a specific or targeted activity, enabled by the explosion in data points we are now able to acquire.

Capitalising on the growing trend and exposure leading to 2020 Tokyo Olympics, where climbing has been approved as a new Olympic sport. Isobar, in a cross-collaboration effort with MKTG and gyro, worked with JLL, a global real estate firm that believes in enabling urban passions, to devise a wearable training platform to improve the performance of climbers.

Based around climbing walls sponsored by JLL, Isobar utilised a suit embedded with 16 high performance motion sensors to record positional data. This creates 100,000’s data points that virtually recreate the kinematics of the climb offering coaches unprecedented, intimate and actionable data sets.

Wearables will only become more entwined with the body with the advent of machine-brain interfaces, the most widely publicised being Elon Musk’s Neuralink where ‘neural lace’ will be made from ultra-fine threads, embedded in the brain, and operated by an app.

As global healthcare systems experience increasing pressure and the wellness market continues to boom, developments in biological computing and augmented body wearables will give the individual more agency over their healthcare needs. (See also: 2.1 Affective Computing and 2.2 Circadian Content).
Opportunities for brands & businesses

Activate the environment

‘Channels’ are no longer ring-fenced platforms. From retail to packaging, transit to mobile - anything has the capacity to be an augmented interface for your brand. Where are the untapped touch points within your ecosystem? How could ambient computing be leveraged as a conduit for content?

Audience as the Agent

The audience can be literally placed at the centre of your experience whether it’s activated by their location, gesture or voice. This will only become more exciting as technologies are able to respond to multiple people and multiple inputs at once within the same experience. Like retail (See also: 3. Social Commerce) experiences will increasingly come to the audience.

Magic content

Lead with creative content that adds value, excites and inspires - and remember the magic does not lie in the utility. It’s in the memorable experience. Use technology that is sympathetic to the context of storytelling and of course, avoid retrofitting content to the platform.

Innovate with your audience

As with many frontier technologies, new MR technologies are more affordable and in the hands of the consumer (think Instagram’s Snap AR filter generator or Amazon’s Skill Flow Builder) consider opportunities to invite your audience to co-create. (See also: 3.3 The DTC Opportunity).
2. Humanising Data
2. Introduction

There is much to be discussed around the subject of data. This particular theme examines how companies are navigating the complexities and ethical challenges associated with an explosion of hyper-personal data, largely powered by Artificial Intelligence (AI) technologies. Challenges for marketers have compounded amidst a shift in consumer concern around how their data is acquired and utilised.

AI has been a topic high on the business agenda for some years and has been the subject of countless conferences and exhibitions as people navigate risks and capitalise on its potential. In 2020 we’ll continue to see the narrative shift from ‘the robots are taking our jobs’ or even ‘the robots are going to take over the world’ to a more rationalised view which explores the benefits of an ‘intelligence’ that can review swarms of data for complicated tasks, complete mundane operations that allow us time for more stimulating work, and even surprise us with content or creativity.

The key? In the reverse - augmenting technology with humanity. From 2020 individuals become deeply involved in AI and machine learning helping to authenticate content, combat problematic algorithmic biases and add human warmth to sterile data sets.

Technology will also be perceived as becoming more in-tune with us with the rise of affective computing which will “read” our feelings and biometrics to deliver more human responses (like chatbot interactions), anticipate our needs (responsive cars) and provide more access for those with mental or physical disabilities. It’s a key computing capability to grasp - emotion recognition, be it your facial expressions or inner feelings is set to surge to a $25 billion business by 2023.

And it goes without saying - businesses will need to find transparent ways of collecting and managing data with consent.

How can ‘Humanised Data’ augment humanity? It...

• Balances data biases and mitigates objectification
• Helps anticipate needs and scenarios
• Tunes into human emotions to create an enhanced experience
In media, audio technology company Dolby Labs is using sensor data generated from similar biosignals to explore how audiences react to films on a physical level, enabling creators to “optimise the intent” of their work - in other words affective computing could make comedies funnier and horrors more frightening.

Such technologies will also downscale to personalised electronics. Take Calm Case of Galaxy, a concept project developed by designer Emilios Farrington-Arnas for Samsung. It uses a galvanic skin response (GSR) sensor to passively detects its user’s stress levels as they touch it throughout the day, and responds with breathing exercises or wallpaper changes when they need calming.

2.1 Affective Computing

Closely tied with ambient computing (see also: 1.0 Augmented Experiences), affective computing will supercharge technology with emotion-sensing capabilities.

Through affective computing, adaptive products will sense our moods, agile services will adjust to our whims and content will be finely attuned to our state of mind. Equipping businesses for this uncharted territory, Isobar’s proprietary applied neuroscience product, MindSight® has been developed to uncover the emotions that allow us to decode complex human responses and generate actionable insights. MindSight® targets the why behind the choices we make. It’s what drives consumers to try a new product, to choose one brand over another, or to keep watching an ad. A version of the cutting-edge technology has even been developed for content delivered in virtual, augmented, and mixed reality experiences.

A direct example of an application that uses affective computing is (R.E.A.D), the Real-time Emotion Adaptive Driving concept by Korean car marque Kia. Lighting, sound, airflow, seat vibration and scent are adjusted as you drive in response to bio-signals like facial expression and heartbeat picked up within the vehicle. The company claims the technology could combat the “94% of serious crashes” caused by humans (U.S. Department of Transportation) by sensing stress, confusion, sleepiness, distraction and inebriation.
2.2 Circadian Content

Affective computing not only delivers highly personalised product engagement but can enhance consumers state of wellness, an aspect intrinsically linked to emotion.

In 2018 and 2019, sleep has been a prominent topic with wellness with the value of sleep tech alone reported to reach over $80 billion by 2020 of the $4.2tn industry. From 2020 this conversation will extend to rhythms, in particular the circadian rhythms that govern our body clock for both activity and rest.

An example activation for this mindset is Isobar’s Jetlag Social Club app created for Air France’s loyalty programme, Flying Blue.

The app acts as a concierge that suggests personalised experiences that match the traveller’s biological clock. The app is being piloted for travellers to Tokyo and offers 130+ geo-localised experience ideas, be it breakfast at 3pm or afternoon naps under the stars. Biosay is another app that tracks your wellness in response to your surroundings. It tracks moods over time creating a unique ‘bioji’ from the data and measures stress, energy and relaxation levels to help increase awareness of how external factors impact our health. Kickstarter-backed Circa Solar is an app for phone and smart watches that displays a full day based on your location, with a dark wedge showing the local hours of darkness based on the season and a line indicating where you currently sit between daylight and night-time.

As pocket-technology becomes capable of synthesising more data it will offer actionable insights that fortify wellbeing. London’s Somerset House gallery even opened a landmark exhibition 24/7 dedicated the exploring different aspects of modern rhythms.
2.3 Human-crafted data

Businesses are coupling AI capabilities (the ability to scan lots of data, or relay standardised information quickly) with a human touch which crafts the data with sense, character, fairness and warmth.

In previous reports, we’ve talked at length about the frictions and teething problems with early encounters between AI and Humans - whether it’s frustrating chatbots that don’t understand the nuances of your query; ‘bland’ robotic recommendations or the algorithmic biases that have incorrectly profiled or worse yet - failed to recognise segments of the population.

Human input is adding character to the digital assistants becoming ubiquitous in our homes. Amazon is launching a program called Alexa Answers that lets anyone field questions asked by users for which Alexa doesn’t already have a response. In future if Alexa relays an answer generated through Alexa Answers, it will also note the information is “according to an Amazon customer.” Not only does this help respond to the kind of bizarre and curiosity-led questions customers might have but creates an ‘assuredly human’ stamp of approval. It also helps combat troubling algorithmic biases that have plagued such services by widening the machine-learning data sets to a diverse range of contributors.

*Moving forwards, the better use of data will include human oversight and assisted curation, be that playlist suggestions, photography selections, creative ideation, copywriting, financial advice or customer support. The best businesses will use AI technology to process data at huge scale, but also use human finesse to get to a best solution.*

Simon Gill — Chief Experience Officer, Isobar EMEA

A key area of criticism has been in ‘discovery’ be it entertainment, news stories (see also 3.3 Social Media in Check) or product with sterile recommendations based on algorithms removing the surprise and serendipity that might be offered by humans. Tonic is a new kind of app offering a personalised selection of reads through a mix of proprietary ‘discovery architecture’ and human curators. Ahead of the curve, it also offers data-free engagement and stores no personal details.

2.4 (Sub)conscious Choice

Access to more affective and human-crafted data is powering more nuanced insights that enable businesses to be more creative in their targeting using personality rather than statistics to make recommendations.

As Gen Z reassess what it means to value themselves, traditional research methods like multiple-choice quizzes suddenly feel wildly inadequate. Fortunately, companies are experimenting with formats that work to avoid cliches, ‘profiling’ mishaps and ultimately deliver more successful experiences.

New formats are taking cues from deep-rooted choices and preferences rather than subjective self-assessments of your vitals creating more true-to-self insights. A great example of this is Tinder’s Choose Your Own Adventure-style Swipe Night series that matches users based on the choices they make. The first trial is a perilous interactive, post-apocalyptic adventure where viewers have seven seconds to instinctively swipe on moral dilemmas and practical choices as they lead a group through the end of the world. The idea being that by modelling an (albeit fun) fight-or-flight series, you’ll reveal your true colours creating more authentic partnerships.

This relates to psychographics which deals with personality and behavioural traits as opposed to demographics which deals with informational data like age, location, employment status.

We couldn’t address this topic area without mentioning the ongoing Cambridge Analytica scandal in which psychographic profiling has been allegedly used to highly segment and target audiences with persuasive political advertising on digital media using data gleaned without willful consent. Regardless of the details, this approach, even in principle has been widely lauded as an egregious means of data.

Transparency, clarity of intent and elected inclusion in these schemes will be key.
One-to-Watch: Rehearsing Realities

Companies are investigating and implementing products that combine data with mixed reality technologies creating virtual experiences that offer space to test ideas, simulate environments and ultimately, rehearse reality.

We’ve seen the power of data-fuelled virtual tools for retail. VELUX windows created an augmented app that allowing homeowners to pre-visualise windows in their home, complete with different lighting simulations and Ikea has developed an AR app for customers to try furniture in their home environments.

If done right, such previsualisation tools will both inspire purchase, help close sales and reduce costly returns - The National Retail Federation estimated a total of $400B in merchandise was returned to retailers in 2018.

Beyond retail and lifestyle, there is a real opportunity to use virtual reality to model history and enact futures. The History Blocks project, a collaboration between UNESCO and Minecraft’s Education Edition, combines educational storytelling with interactivity inviting students to digitally resurrect monuments like those that have been destroyed during conflicts. Augmented reality company Magic Leap has partnered with Brain Lab, a company which supplies visualisation and training software for surgeons to develop spatial computing solutions to optimise medical procedures for every patient.

“Our operating system will enable anyone to integrate multi-dimensional virtual data into real-world clinical workflows, driving precision, productivity and an intuitive user experience,” said Stefan Vilsmeier, Founder and CEO of Brainlab reads the press release. These projects demonstrate the potential for data plus alternate reality technologies to be leveraged for social good, scientific benefit and cultural understanding.

In November 2019, internationally renowned scientific journal Nature announced the development of a new innovation where virtual and augmented reality is enhanced by haptics or the sensation of touch. The ‘skin machine’ is a device that also allows people to experience physical sensation through pressure, vibration and motion which will have transformative impact on video games and prosthetics, entertainment and media. (See also: 3.3. At-home Immersion).

“The emerging technology that will have the greatest impact on the consumer experience will be augmented reality as it continues to gain traction among users, making the shopping experience more interactive, personal and interesting.”

Dave Meeker — Global Chief Innovation Officer, Isobar

Photography: Isobar
Opportunities for brands & businesses

The humans behind the humanising

Who is behind the programming and is there a diverse spectrum of input to counteract the inherent biases behind it? Are you using humans to craft and refine your data? And better yet - do those humans include your customers?

Meeting emotional expectations

Affective data offers possibilities for rich insights and anticipating consumers needs. Where this gets really exciting is the opportunity to craft experiences that meet the consumers emotional needs.

Divert data for good

There are real opportunities to shift the narratives around data to positive stories around data-for-good. We’re seeing the benefits of data to make the world safer and better understood whether it’s smart technologies that detect loneliness or a drunk driver or platforms to model and avert risks.

Corporate Data Responsibility?

Will we see ‘CDR’ (Corporate Data Responsibility) enter the vernacular? A succession of high profile data leaks have left consumers vulnerable and on alert. All five of the trends in this Augmented Humanity reports are entrenched in good data management practices.
3. Socialised Commerce
3. Introduction

In 2020, retail models will continue to transform around the customer.

Where ‘inspiration’ once happened on social platforms and ‘transaction’ happened on websites, the two functions are now merging as social platforms become centralised destinations for a holistic retail experience. With 92% of people admitting to trusting their peers over a traditional advert, it’s little wonder retail has migrated to where the customer is sharing, socialising and seeking advice.

Where the ‘sharing economy’ turned consumers into merchants, the direct-to-consumer model has turned consumers into co-creators with start-up challenger brands iteratively shaping their offerings through active feedback loops and intimate customer service. This is encouraging legacy brands to take note, assess their own brand-merchant-audience relationships and unlock new revenue streams in the process. In this new ‘community economy’, best case scenario, your consumers can tell you what they want, promote and even sell on your behalf whilst your cloud-based platforms feed you fast, real-time data you can respond to for constant iteration, creating a hyper-attentive service for your customers.

The roles of ‘influencers’ and ‘followers’ are being reappraised in terms of endorsement vs effectiveness in a social-scape that is increasingly championing inclusivity over exclusivity.

With ecommerce forecast to account for over 60% of all online interactions by 2020, these are key developments to understand and implement. Creativity has once again become of vital importance in achieving differentiation in the commerce experience.

How can ‘Socialised Commerce’ augment humanity? It...

• Drives with the consumer, where they are
• Empowers individuals to control retail experience
• Champions innovation that mitigates waste and losses creating retail models that are better for customers, companies and planet
'Pocket Store’ was designed for WeChat and anyone with a phone could open, design and share their store turning brand customers into brand owners with promotions and discounts for both seller and buyer. Demonstrating an appetite for this kind of retail model - 560,000 pocket stores were opened on day one with one retailer selling $1 million worth of KFC alone. Through the initiative, KFC total ‘stores’ increased by 345 times illustrating the significant potential in the model.

3.1 Peer-to-Peer

In 2020, we’ll continue to see the evolution of peer-led sales models where the customer becomes sales agent and advertiser within their own sphere of influence.

Traditional influencer status is changing and research is now demonstrating that ‘micro’ influencers with 1,000 - 5,000 followers have a higher engagement rate (8.8%) compared to traditional influencers with 10,000+ followers (3.6%)\(^1\). In 2020 brands will leverage the powerful influence of friends, family and familiars with the rise of peer-to-peer sales, particularly amongst the millennial cohort, 70% of whom are influenced by the recommendations of their peers in buying decisions\(^2\).

This trend is also being driven by the predominantly peer-led, resale economy whether it’s online marketplaces for sought-after sneaker models like Grailed or fashion-led eBay-style marketplaces like Depop. In the US alone, resale is predicted to reach $41bn by 2022, up from $20bn in 2018\(^3\).

This year, Isobar created a Cannes Gold winning execution of peer-to-peer retail with Pocket Store for KFC.

How do you reach more Chinese consumers in a country of 1.93 billion and only 5,860 stores? Isobar developed a ‘Me-Commerce’ experience enabling Chinese consumers to open their own KFC store and sell chicken on behalf of the brand.
3.2 The D-T-C Opportunity

2019 has been the year direct-to-consumer (DTC) has truly crystallised as a leading retail model blueprinted by brands like Everlane, Casper, Beauty Pie, Hims and Glossier.

The DTC model has revolutionised how new brands and start-up retail, has created a legion of brands with loyal databases, repeat custom, reduced returns and reduced overheads. Here, the audience is at the centre of the product creation (Glossier), transparency in costs and supply chain builds inherent trust (Everlane, Beauty Pie), customers aren’t overwhelmed by product assortment (Hims) and storytelling is tightly focused (Casper is all about ‘sleep’).

The inherent benefit of DTC however lies not just in the leaner operating costs but in the direct relationship with consumers, specifically the consumers’ data which is not mediated or owned by marketplaces or 3rd party merchants. Consumers forge tighter relationships with the brand from the get-go fostering longer term loyalty. Great for start-ups but how do global and legacy brands replicate that DTC success with owned-data at the heart? Whilst marketplaces provide quick wins in terms of sales, they don’t necessarily forge long-game brand loyalty and there will be an upweighted focus on reconstructing brand-owned platforms into engaging destinations be it on social media channels (see also: 3.3. Social Storefronts) or on websites. Mixed reality technologies will open up previously untapped opportunities to create memorable retail experiences on brand-owned platforms.

Japanese beverage giant Suntory’s ready-to-drink (RTD) brand BOSS coffee leveraged the LINE platform (with over 80% of active users in Japan) to operate an in-app commerce experience called “Touch-and-Go” for time-poor commuters. The familiarity of LINE facilitated great user adoption and engagement and its UI functionality underpinned customisation between 120 coffee flavour combinations, bespoke label designs, packaging for easy mobility and speedy pickups. The solution balanced fast service and unique customer experience underpinned by a social-first storefront with seamless commerce capabilities. LINE’s own cashless system ‘LINE pay’ and pre-registered credit cards enabled users to be notified with a unique code in real-time when their drink was ready for pick up at the designated Touch-and-Go unmanned stores. The code opens a locker box with the ready drink and operates at a 10-second pickup time on average. This service reported acquisition of 40K new friends on LINE, 27.4 million impressions on social from UGC, and selling out every day within a month of launching.

Some brands are also learning from DTC from the inside out with in-house DTC Incubators. Earlier this year adidas launched Platform A, an accelerator program for sports start-ups within the areas of digital, global sales and community building. Amazon’s internal incubator Launchpad have also invested in entrepreneurs with product-based business ideas as a means of learning about the DTC process.
3.3 Social Storefronts

With a rise in Peer-to-Peer sales, 30% of consumers saying they would make purchases through social14, and social media becoming the third-largest channel for advertising (behind television and paid search)15, the major social platforms are introducing in-app shopping functions to centralise commerce where the conversation happens.

"Shopping in social media is a natural progression of mobile based customer behaviour, where research, preview and transaction can happen across multiple throughout-the-day moments. By connecting the shopping process to one’s own social graph, it’s easier to access to deeper product knowledge and more valuable personalised reviews, resulting in a greater belief of making the right purchase.”

Dave Meeker — Global Chief Innovation Officer, Isobar

Rising short-form video platform TikTok11 has launched a new feature that allows users to shop for products associated with a sponsored Hashtag Challenge without leaving the app. For example, users might be asked to upload a video of their favourite t-shirt, tag it with their campaign hashtag #t-shirt and shop from that hashtag via a separate tab.

Good Product Circle is an extension of WeChat’s ‘Shopping List’ feature, a new interactive module that allows users to recommend products, access friends’ recommendation lists, and socialise on the interface. Native mobile shopping startup Dote features a “Shopping Party” function which puts ‘meet-and-greet’ style hangouts at the centre of the shopping experience allowing people to share live video whilst browsing different products on Dote and talking to fans. With 1 in 3 people shopping on mobile, social-ready commerce solutions are becoming an essential component of business sales ecosystems.18

3.4 Blockchain Products

In 2018 we discussed how blockchain is powering track-and-trace solutions to measure provenance and distribution, now we’re beginning to see blockchain technologies integrated into the very fabric of mass-market products.

Blockchain, Bitcoin and cryptocurrency are entering mainstream marketplaces through the introduction of proof-of-concept products. Take The Other Bar, an ‘experimental’ new chocolate bar designed to fight global poverty with a scannable code inside the packaging that allows you to donate a blockchain token to the farmers in Ecuador who produced the cocoa. As well as accepting payments in bitcoin, online coffee retailer Blockchain Coffee provides ‘verified’ customers access to a “private chat server for crypto and coffee enthusiasts”. New York’s Grit Bxng is even bringing bitcoin to the boutique fitness opening the technology to new audiences.

We’ll start to see blockchain touch multiple aspects of the consumers retail experience including advertising which was listed as one of the Gartner Hype Cycle’s top six marketing technology investments. In the report, blockchain was highlighted as having promising applications to combat fraud, lack of transparency, privacy and barriers to open competition within the advertising supply chain. “Beyond fraud prevention, blockchain could offer new ways for consumers to manage personal data. It can enable organisations and individuals to verify the provenance of content and goods, reducing the threat of association with fake news, counterfeit products and ads promoting them.”19 (See also: 5.3 Trustmarks).

“Despite the scepticism, distributed ledger technology continues to develop at pace. A growing number of collaborations have been recently announced, including; New Balance’s use of the Cardano blockchain to track product authenticity, Lamborghini’s use of the Salesforce blockchain to certify vintage models and the many banks using Ripple or Stellar to execute cross border payments. Perhaps the most exciting, is the development of compelling distributed finance (DeFi) solutions, that clearly demonstrate how blockchain is being used to engineer a new financial system.”

Simon Gill — Chief Experience Officer, Isobar EMEA

For more information about blockchain, download the Isobar Blockchain Playbook. The playbook explains what blockchain is, the technology in practice and how it can be integrated into businesses today, including high-growth markets Brazil, India and China. It unpacks blockchain’s potential impact on the global media and marketing industry including supply chains, transparency, brand management and creativity, as well as explaining what marketers should do next.
One-to-Watch: Render-only Retail

What started as a sci-fi concept is now becoming a tangible reality with the rise of digital-first or digital-only products.

These are designs that exist purely on digital platforms and made-to-order, or sometimes not even made at all.

In a culture where it’s all too often about the digital brag, retailers are exploring digital-only concepts that satisfy the customers need to post the latest thing but with reduced material costs.

On a creative level, render-only retail invites brands to be experimental and explore the outer edges of their design identity with low risk. “Imagination is our only atelier, and our fashion stories are free from the constraints of the material world” says digital fashion house The Fabricant who specialise in photo-real 3D fashion design and cinematic-level animation for digital fashion editorials and digital clothing.

On a practical level, it also means ideas can be tested and shaped with the audience reducing design misfires, reducing wasted stock, increasing customer satisfaction and supporting the environment. Marking a turning of the tide, US fashion brand Tommy Hilfiger have announced that they are striving for a 100% 3D design process across creation, development and selling samples by Spring 2022 onwards (Vogue Business).22

The explosion of e-Sports, video games and virtual environments are legitimising the need / desire for digital products and brands are already responding with new products unveiled during gameplay or through designs made exclusively for pixelated characters. Digital-first retail experiences could also have interesting design implications for physical products.

Mink for example is an experience that bridges the digital and physical shopping practices. Described as the ‘world’s first portable 3D makeup printer’, users can share any image to the printer which is then printed onto a special paper and then brushed onto the skin with 16.7million colour possibilities offering unmatched and instant personalisation.

Photography: Isobar
Opportunities for brands & businesses

As transactions migrate to social - what’s the role of the website? Mixed reality technologies and unprecedented rendering capabilities have opened a toolbox of creative opportunities that can strengthen and differentiate your website platform. How might ambient computing support transaction as well as storytelling? Ethical retail practices - averting ads appearing in the wrong place, is your chain in check?

Re-imagining the website experience

Assess where research, inspiration, recommendation, comparison happens and select your social storefronts accordingly. There is also scope to use social media platforms as a place to experiment.

Are your social storefronts transactional?

Future of the website - robust is a must!

The best innovations will fall flat if the fundamentals aren’t right. Robust web support and fast loading speed are essential. See the results of a well-supported web platform in Isobar’s case study for British supermarket retailer ASDA - one of the first brands in the UK to launch a Progressive Web App, a fast-loading landing page that sits in front of an ecommerce site, taking shoppers from search to brand content while the main website is loading. ASDA reported a subsequent 14% decrease in bounce rate and a 56% increase in page views.

Plan for consumers-as-consultants

Both Peer-to-Peer and DTC are generating ‘instant advisory’ services for brands. At the moment this advisory related primarily to product development but in future we’ll see consumers start to advise more on more on business practices that shape your company.
4. Digital Kinship
4. Introduction

“The web has grown up—and so has its users. Adapting to their behaviour is a huge opportunity for brands to build better, more trusted relationships.”

Tim Andree — Executive Chairman & CEO
Dentsu Aegis Network

The emergence of social media platforms created a culture of mass-connectivity, but not necessarily connections. 2019 has been a pivotal year for people’s relationships with social media behemoths particularly Facebook, Instagram and Twitter. Trust has crumbled in light of a number of high-profile controversies from the selling and manipulating of user data to the use of social media as vehicles for the distribution of harmful content.

Furthermore, despite 100’s if not 1,000’s of acquaintances/connections/friends, the statistics are evidencing a rise in loneliness as individuals report a lack of connection in the ‘real world’. In addition, there has been a rise in the distrust of digital profiles with many believing they represent carefully engineered portraits that don’t reflect the depth of true human experience or worse yet - represent fake identities or bots.

Dentsu Aegis Network’s Digital Society Index research found that 33% of people believe they have been affected negatively and 20% have actively limited their time online and 14% have deactivated a social media account.

These widespread concerns are catalysing the emergence of new platforms and new behaviours in an attempt to combat the negative side-effects of social. In addition, two-thirds of people believe the positive impacts of digital (like access to information, efficiency and choice) outweigh the negative (cyber-crime) today and over the next 5-10 years.

Technology is empowering nuanced segmentation that can better reflect real “community” groups whilst allowing previously underrepresented or entirely new community groups to rise to the fore. Whilst the major social media platforms continue to meet a variety of needs, we’re also seeing people adopt smaller platforms with the intent of forging genuine connections that reflect shared interests and affinities and bridge both digital and real world interaction.

How can “Digital Kinship” augment humanity? It...

- Enables positive, productive connections
- Means everybody is involved
- Protects from harmful content and behaviour
- Redefines ‘demographics’ with more meaningful segmentation that reflects the breadth and depth of the audience
4.1 Micro-segmentation

Technology is empowering marketers to fully understand the breadth and depth of their existing and potential consumer groups by deconstructing limiting catch-all groups into nuanced segments.

CMOs believe that the deeper understanding of consumers and culture (65%) will be one of the most important future sources of differentiation for marketing agencies. The voluntary (and involuntary) masses of data within reach has upended the traditional notion of consumer demographics. AI will play a key role in reviewing and categorising masses of data to create nuanced consumer groupings that result in more accurate product recommendations and ads served to customers that help them find what they need more efficiently. British AI firm Peak are specialising in this type of quantitative insight. For one clothing retailer, they used AI to scan previous search and transactional behaviours and generate grounded predictions on style, size and colour preferences turning the retailers 8 segments into 962 tribes such as “women with small feet who wear children’s shoes” and “women buying for a 14-year-old son”. The brand subsequently enjoyed an 8,400% return on social ad spending and 28% in campaign revenue.

The great challenge will be how to balance ‘useful’ recommendations with ‘manipulative’ recommendations as highlighted in the much documented Cambridge Analytical scandal, (see also: 2.4 (Sub)conscious Choice).

Isobar are working with brands to conduct global segmentation, shopper journey, and customer analysis using MindSight®, Isobar’s proprietary emotion-led insights platform (see also: 2.1 Affective Computing).

Isobar created MindSight® to access the emotional brain and transcend consumers’ barriers. Uncovering emotional forces that drive category usage, product trial, and brand loyalty. Find out more here.
4.2 Niche Networks

New social media platforms are arising around the cultivation of smaller, more contained, more connected communities around specific interests.

1 in 5 Canadians identify as being lonely,\(^{26}\) 30% of U.S. millennials say that they always or often feel lonely\(^{27}\) and the UK Govt has even appointed a Minister for Loneliness\(^ {28}\) to combat the issue. Loneliness is becoming one of the social crises of our time and somewhat ironically, ‘social’ media has compounded the effect as the initial rush of collecting digital friends has worn away and not delivered on the social connection humans crave.

Whilst big platforms like Instagram and Twitter continue to provide useful services like research, news, entertainment and shopping, we’re seeing the rise of ancillary platforms that convene smaller gatherings of like-minds together. Research by Activate analysis says people in the U.S. now belong to an average of 5.8 social networks, and projects that number will rise to more than 10 social networks by 2023.\(^ {29}\)

Quilt for example is one such platform touted as ‘a leaderless community of women who gather to grow together through conversation’ where individuals are invited to join gatherings of interest. Frolo is a network for single parents to find other like-minded single parents living in your area with shared interests and similar-aged children. The Grief Network aims to tackle the lack of resources for people who have experienced bereavement in their early adulthood. Crucially, these smaller communities are creating a sense of ‘safe space’ and sense of neighbour hood that means it’s more likely that these people will meet up in real life and forge genuine friendships.

We’re also seeing the resurrection of simpler forum-based communities partly in thanks to gamer communities using platforms like Discord for voice and text chat during gameplay. Swedish retailer H&M launched Itsapark in beta earlier this year as a ‘Quora’ style Q&A platform for shoppers to get answers from stylish interviewees and we’re even seeing some communities turn to sub-Reddits for quieter conversations. The founders of sub-Reddit thread r/MakeupRehab describe it as “a place for those who are on a no-buy, low-buy plan, or just want to talk make-up and beauty without being bombarded with sales, hauls, and other tempting posts.” Earlier this year, Facebook underwent a major redesign putting Groups at the heart of the experience complete with a Groups-only tab offering a more focused newsfeed.
4.3 Social Media Influence in check

It is now impossible to detach the influence of social media behemoths like Facebook, Instagram and Twitter as a shaping force on culture, societal behaviours and even politics.

Amidst a history of distrust, accountability is a clear and residing focus for social media companies with heavy investment into safety features, tech and human moderation and stringent rules on data usage designed to protect both the public and advertisers.

Six out of ten US Citizens surveyed in the Dentsu Aegis Digital Society Index believe that social media is having a negative impact on political discourse in their country.29

Kantar CAMAG reports estimate spending for political ads in 2020 will reach $10 billion (up 59% from the 2016 election)30 and social media networks are under pressure to instil measures to safeguard against manipulated or fake campaign content.

This is of course, a huge and on-going subject but we are beginning to see initiatives that indicate accountability. Twitter announced October 2019 that they intend to ban all political advertisements on its platform and Social Media Today reported Twitter are also considering checkmarks that would indicate content created by bots.

Facebook are set to launch a ‘False Information’ feature on Instagram with an independent team of fact-checkers verifying the information featured (see also: 2.3 Human-crafted data).

54% of people in the US, UK, France and Germany are more concerned with protecting personal information today than a year ago31 and this is creating a migration to private messaging apps with 63%32 of people opting for private messaging apps over social media, SMS and Email. Apple is putting ‘privacy’ at the heart of their latest product campaigns in an attempt to lead by example highlighting features such as maps that don’t track where you’ve been and Intelligent Tracking Prevention that helps stop advertisers that follow you as you browse across sites. There’s also a proliferation of encrypted alternatives in response to unease surrounding cloud platforms like Graphite for online document creation and sharing and Everipedia which uses blockchain technology to track and reward people for contributing to the network.

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4.4 IRL Social

Recognising the irony in its ability to create disconnect, businesses and brands are experimenting with creative ways to bring the ‘social’ back to social media.

Isobar created a campaign for Makossa designed to do just that.

Makosa is an annual festival in Brasilia designed to bring together different people of different music tastes. We echoed this sentiment in our campaign via a poster covered in multiple AR codes, the idea being you need multiple handsets to activate the content, get a complete picture and obtain all the details for the events.

Squad is a group chat smartphone app that allows up to six participants per video chat. Users can “flip” their camera to show their phone screen so that everyone in the chat can follow the user’s activity as if it were happening on their own phone creating a “hangout space and sense of connectivity, even when participants are apart”.

Google’s Digital Wellbeing Experiments have been set up to foster healthier or more mindful relationships with devices. We Flip for example is a digital detox where groups are challenged to stay off their phones together.

The session is ended once someone unlocks their phone whilst the We Flip app reveals how many times individuals snuck a look at their phone during the detox.

Many of these initiatives will serve as beta tests as device design gears towards cultivating healthier habits for children especially amidst backlash against unethical, ‘persuasive design’ techniques used to extend screen time on YouTube, Facebook and Twitter.
One-to-Watch: Countercultures

The internet or ‘cyberspace’ was once a cradle of ‘counterculture’ where creativity, alternative systems for living and new ideas were born and shared. As hacking, gaming and even biohacking communities assimilate into mainstream behaviours - how is ‘counterculture’ expressed now?

Perhaps ‘counter culture’ could be shorthand for ‘under-represented culture.’ We’re seeing new online and media platforms emerging that exist to shine a light on cultures which not yet risen to influential prominence, despite being as globally connected as the rest of the web.

Next Eleven Paper is a magazine and exhibition platform dedicated to championing the music scene from the ‘next eleven countries’, Bangladesh, Egypt, Indonesia, Iran, Mexico, Nigeria, Pakistan, the Philippines, Turkey, South Korea and Vietnam. “Their over-driven economic metabolisms will generate all manner of social tensions and cultural rifts, which could spawn some 21st Century musical form that might take the world by storm just like jazz and rock’n’roll did in their day. It could be that non-Western folk forms colliding with digital technology and the Internet will spawn some unimaginable new sound.”

As the ‘who’ behind the tech is reassessed (see also: 5.4 Tech for and by everybody) will we see surprising new software, web applications and technologies emerge from new perspectives?

Ctrl Your Future is an event series hosted by Digicat in partnership with the Institute of Coding aimed at 16-18 year old “women, non-binary people and transfolk” who are interested in learning skills to pursue a career in creative tech. Google’s Creatability is exploring how creative tools like drawing can be made friendly for people with disabilities.

As individuals seek to decentralise the web and cultivate more meaningful networks (see also: 4.2 Niche Networks) we’re seeing the emergence of new types of platform that hybridise different technologies. Newlife.ai for example is intended for artists, designers, crypto-nerds and tech enthusiasts. It’s also ‘governed’ differently as founder Vector Newman explains, “There is no boss, no executives. As the founder, I’m federating people but eventually I want this project to be owned and driven by the community.” The app itself is divided into eight video game-style levels and each level unlocks a different function on the app. Level one is a voting booth where users are presented with various posts from across the network, the more you vote with the community, the more Newpoints you gain. It uses New Coin, a blockchain “measured by the curation, the trust and the creativity of the users of the app.” Belacam is a cryptocurrency-based social media site that is positioning itself as a competitor to Instagram and a place where users may earn between $.05 to $.10 for each like they get on their photos. (see also: 3.4 Blockchain Products).

Photography: Isobar
Opportunities for brands & businesses

Is there a case for groups that tap into “dark social” habits or smaller communities? Are there existing smaller communities, forums or micro-influencer networks you can support? (See also: 3.1 Peer-to-peer).

Consider your social media mix

Tools for tighter segmentation are now within reach, partly in thanks to AI but targeting will need to be used with consent and carefully balance helping the customer to find what they want and meet their needs vs. persuasive or even manipulative design.

Mindful segmentation

It’s worthy of the repetition - data sensitivity and transparency around data usage will become a powerful source of differentiation.

Transparency

Instead of striving for more frequent interactions, there may be an opportunity to push for fewer but more premium encounters. There is also scope to encourage more balanced relationships with technology by rewarding collective behaviour or reduced screen-time.

Reward healthy habits
5. Post-purpose Activation
5. Introduction

It is time for action. ‘CSR’, ‘cause-marketing’ and ‘purpose’ are synthesised and superseded by ‘Post-Purpose’ which is in short, an exciting but challenging opportunity for businesses to re-discover their purpose and create a positive impact in the fields in which they are operating.

“Society is at a tipping point. It’s a period of extinction for brands. Those that survive will be the ones that move beyond what is popular, to what is important, and demonstrate authentic action on the most material issues facing our society today. As an industry we have incredible influence to effect change. Now is the time for action.”

Anna Easton
Head of Social Impact, Dentsu Aegis Network

It seems like every week, new statistics are released on the global consumers increasing preference for brands with a cause and conscience. It will be increasingly difficult for brands to operate without contextualising their existence in relation to some of the most challenging issues of our time, be it social justice, the planetary crisis, healthcare and wellness or human rights. Whilst ‘activism’ may be a stretch, advocacy isn’t and consumers are increasingly demanding that brands take an off-the-fence stance, in some cases creating a kind of civic surrogacy in place of governments focused on domestic politics. In order to earn cachet with your audience, alongside championing your product or service, it’s also about saying - we represent you and your community. Campaign-led hooks are outdated and consumers won’t stand for ‘woke washing’ or opportunism. Every facet of your business and decision-making should be in line with that purpose. It’s not enough to feature disabled models in your campaign - does your hiring policy reflect mixed ability staff? Are your stores and businesses offices accessible? Is your website optimised for visually-impaired users? Evidencing, authenticating and demonstrating your long-game commitment will be paramount. Not only is this shift better for individuals and the planet but it’s better for business. Sustainable product sales have grown 20 percent since 2014. At the same time, conventional product sales have dropped. Desire for more sustainable lifestyles is also on the rise. 92% of consumers around the world say they are trying to live more sustainably and 54% say they could be doing more — but they need help.

How can ‘Post-Purpose Activation’ augment humanity? It...

- Builds and evidences relationships founded on trust
- Helps respond to planet’s biggest challenges via the consumer
- Assesses the context businesses are working in and make a difference to it
5.1 Civic Brands

It’s almost impossible for a company to exist in a vacuum without recognition of the context in which it is operating in the world. Consumers believe companies have a duty to contribute to improving the situation of what has become a turbulent time. We’re seeing a fundamental shift in the ways companies choose to contribute to the good of society evolving from ‘halo effect’ projects to bold investments that address or contribute to driving systemic changes. Many of these actions support or in some cases substitute civic shortfall.

San Francisco has been a hotbed of controversy with Silicon Valley’s billionaires rubbing shoulders with some of America’s most impoverished. When Amsterdam-based WeTransfer opened an office in the area they were determined to create a significant contribution to remediating the local homeless crisis. They joined forces with fellow tech brand Headspace to donate $30 million towards tackling medical debt - a root cause of the city’s crisis and further still, are developing best-practice guidelines for how growing tech companies can better engage with and support their new communities.

Patagonia is often cited as a brand striving for purpose-driven excellence by channeling every brand and marketing effort into “build the best product, cause no unnecessary harm, use business to inspire and implement solutions to the environmental crisis” describing their efforts as ‘advocacy’ rather than activism.

This might include founder Yvon Chouinard donating its $10 million made from tax cuts to environmental groups; advertising campaigns encouraging consumers to fight for public land in response to government legislation and their ‘Action Works’ cafes educating citizens on how to get involved with causes they care about or even their infinite returns policy.

With more access to funding, global reach and influence, businesses and brands are becoming duty-bound to help solve some of the world’s biggest problems. To help clients think of innovative ways to drive social impact, in 2018 Isobar launched Isobar Good, a solution using the agencies’ capabilities to bring about significant social, community and environmental change aligned to the UN’s sustainable development goals.

“Isobar Good catapults brands into the future by bringing social impact into the core of their business models – all brands can play a meaningful role in thinking (and executing) innovatively to make the world a better place. It’s an urgent need for the c-suite: consumer expectations around transparency have held up a mirror to where global business is making a negative contribution to humanity - whether that be compounding stereotypes or contributing to landfill - and as such, a ‘higher purpose’ makes both brand and business sense.”

Kara Prosser — Isobar Good Lead

Photography: Isobar
5.2
Shared I.P.

Where to start? Companies are acknowledging that true solutions to problems and systemic change is going to require cooperation, shared ideas and infrastructure.

We’re seeing companies form unprecedented allegiances - in a bid to galvanise industry wide and long-term change. We’ll start to see more collaborative playbooks as industries attempt to navigate (and regulate) fourth industrial revolution technologies from blockchain to data privacy, self-driving cars and even biotechnologies.

In the UK, in response to the influx of commercial robotics, we are seeing automation in sectors such as retail. The John Lewis Partnership has worked with robotics companies, design consultants and industry bodies to develop what it says is the first blueprint for human robotic interaction (HRI) of the 21st century. Likewise Google Cloud is partnering with fashion brands, NGOs and industry experts to create an open, industry-wide tool and set of data resources that will help companies to better measure the impact of their raw material in relation to air pollution, greenhouse gas emissions, land use and water scarcity.

Central Saint Martins recently partnered with Nike to create a manual or ‘textbook’ laying out the principles of circular design featuring best-in-class examples from a variety of competitor brands including Patagonia, Outerknown and Eileen Fisher.

Isobar is committed to transforming the role of brands in the digital economy, using the power of partnerships to deliver better outcomes for society, as well as long-term commercial opportunities. Dentsu Aegis Network (parent company of Isobar) is actively collaborating with industry through initiatives like Common Ground - the world’s six largest advertising holding companies, uniting to help tackle the UN Sustainable Development Goals (SDGs) with a mission to impact 1 billion people through SDG-led campaigns by 2020. Find out more here.

Photography: Isobar
5.3 Tech for and by every-body

Augmented Humanity means including everybody under ‘humanity’ in both the creation and end-user application of tech services. As we move away from clunky demographics and towards better representation and inclusivity, this will mean investing and involving overlooked audiences in the process.

In previous reports we’ve highlighted the issues surrounding algorithmic biases and gendered product design which has triggered an industry-wide debate around the inherent biases behind the products and digital services we use, and their perpetuation of societal imbalances. “Imagine a world where your phone is too big for your hand, where your doctor prescribes a drug that is wrong for your body, where every week the countless hours of work you do are not recognised or valued. If any of this sounds familiar, chances are that you’re a woman”. Caroline Criado-Pérez’s book Invisible Women: Data Bias in a World Designed for Men received plaudits for its illuminating review of how the global populace are operating in a world largely built for men.

Setting a positive example and in response to the fact that most automakers still produce cars based exclusively on male crash test dummies resulting in a higher risk of injury in a car for women, Volvo have made 40 years of research on both men and women available for public download to share insights and mitigate future risks for the wider good.

Data needs diversity as designers and architects build a more diverse digital economy. Senior Planet Exploration Center in NYC geared to help 60+ year olds master tech devices and online surfaces, smoothing the knowledge gap between digital natives and silver apprentices.

We’ll also continue to see technology unlocked for segments of the population with physical or cognitive disabilities and older populations representing $2.1 trillion spending power. Big brands are in the process of addressing the accessibility of their products, be it IKEA’s ‘ThisAbles’ open source project that invites people to suggest 3D printed add-ons for its furniture or Microsoft’s accessible gaming controllers released for XBOX. APAC alone is home to 690 million people with disabilities and yet technology is not adequately equipped to cater for them. Simple initiatives can transform this, whether its retail giant Alibaba’s ‘Smart Touch’ silicone overlay that helps blind consumers use their smartphones or Isobar India’s ‘Blind Faith Upgrade’ kit that enables hotels to transform any of its rooms into a visually-impaired-friendly room.

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Brands are continuing to experiment with novel ways of applying popular technology and cultural phenomena for social good.

How can we listen to consumer behaviours and use them as models for engagement? Take Isobar’s EarthApp project for Greenpeace Russia. In July 2019, ‘FaceApp’ became a global phenomenon with 1.2 million people a day using it to age their face. Capitalising on this captivating form of engagement, in lightning-speed Isobar created a real-time marketing app that mimicked this craze...for the Earth.

The app showed six possible future scenarios for Russia if we don’t halt climate change. The app resulted in widespread coverage with more than 135m campaign views (as of Nov 2019). The magic was in the responsive turnaround as a cultural phenomenon was coupled with cause to create significant results.

And it needn’t be complicated developer builds. We’re seeing a return to simple but powerful tools using basic cell phone functions. Direct Relief developed a “bot” application to answer questions on Facebook after realising its response time was getting critically high. Direct Relief and its bot builder, Mind Heros have subsequently open-sourced their model made available for free to other nonprofits through BotsForCharity.com. A pilot program in Anchorage, Alaska is using a conversational marketing, SMS system for unenrolled residents to communicate with The Food Bank of Alaska.

As more tools are handed over to the consumer we can expect another wave of Open Source innovation as consumer-creators offer new and unexpected ways of employing tech for good. Take Spark AR, which allows users to create and share their own augmented reality effects and filters or Bounce, which has released a public version of its music creation and distribution app.

5.4 Subverting tech for good
One-to-Watch: 
Trustmarks

In a post-truth world, companies will need to not only walk the talk but verify and evidence their activities.

‘Transparency’ has been a buzzword in recent years with companies increasingly called upon to be open about their practices and processes be it American retailer Everlane inviting customers to ‘choose what you pay’ or luxury cosmetics website Beauty Pie retailing at factory cost.

From 2020, ‘transparency’ will be partnered with ‘verified’, with the rise of new marks that distinguish transparent practices across supply chain, disclosure, data governance, accountability and relationships. For example, new IoT platform ThingsCon have developed the ‘Trustable Technology Mark’ in collaboration with Mozilla Foundation helping consumers identify connected devices that respect their privacy and security. Sustainable skincare brand Maiiro has launched ‘Pack of Lies’ a campaign and platform to call out and eliminate greenwashing in the beauty industry with a petition demanding brands clearly list on their website how much plastic they use and how much they have currently reduced from their products and packaging.

Expect to hear ‘minimal viable data’ enter the vernacular as companies start to assess the scale and specifics of the actual data they need in order to best serve customers - and earn extra kudos in the process.

Isobar worked with Australasian bank ANZ on a seamless and transparent loan application process for customers. Simplifying the process for customers and bankers alike, the Banker Desktop only asks for the most necessary data from the customer and by focusing on transparency within the customer experience, ANZ has been able to reduce its application time by 83%, giving the company back around 1,660 hours daily across Australia.
Opportunities for brands & businesses

Inclusive Augmented Humanity

Augmented Humanity should be powered by a spectrum of individuals to safeguard products and services from inherent biases and avoid exclusion of minority and marginalised groups. Products and services should by default, consider the full spectrum of its end users. From 2020, there will be no excuses for algorithmic bias and machine learning will need to be sourced and trained from diverse datasets.

Address all touchpoints

In terms of physical product - can buttons be accessed and can packaging or tools be used by people with a physical impairment? In terms of service delivery - can your website be understood by someone with a sensory impairment? How might your store be adjusted to suit someone who has an invisible disability?

Activate around your purpose

Grafting purpose or alignment with a cause onto your business will result in inauthentic and unsustainable activation. Revisit your original purpose and run that through your brand, business and marketing decisions and evidence it. Authenticate your actions - no one can achieve full transparency overnight but think about how you could effectively communicate your intentions, journey and process.

Be humble through collaboration

Who do you need to collaborate with to amplify the impact of your efforts? Where might third-party expertise add weight or credibility to your proposition? How might learning with like or even competitor brands compound your efforts?
1. Experience is a critical differentiator

Whether retail or media, entertainment or finance, all businesses are now in the business of experiences. Technology impacts the “Augmented Humanity” experience on both sides of the coin. On one side it can create smooth, seamless interactions with complicated or convoluted activities made discrete, fast, efficient - more enjoyable. On the other side of the same coin, technology can elevate those experiences to a magical, inspiring and unexpected effect.

2. Creativity and experience drive differentiation in commerce

With the consumer rapidly reshaping where and how commerce is happening and in a time where any business can compete on desirable product, experience and creativity will set brands apart, create memorable interactions and drive loyalty. Fourth industrial revolution technologies are equipping businesses with tools for unprecedented creativity (Internet of Things, Mixed Reality, voice-activated assistants) and reliable performance (cloud computing, chatbots, AI) that will redefine the commerce experience.

3. Creativity and agility are critical to business transformation

With creativity, brands have expanded from product silos into experience ecosystems comprised of products, services and content that work together to holistically enhance our lifestyles and reinforce their purpose. As an example - US consumer brand Casper has positioned itself as being in the business of ‘better sleep’ which has permitted it to creatively diversify from retail mattresses into gesture-based lamps, CBD gummies and whatever it chooses next...

This agility is the key to safeguarding businesses for the future. A transforming business can move with it and create holistic offerings for the audience, unlocking new audiences and opening new revenue streams.

4. Untethering technology

Technology is an integrated aspect of our lives but true Augmented Humanity will be achieved in our untethering from it, on multiple levels. As the average number of connected devices rises to seven per person in 2020, the challenge will be to upweight technological innovation that makes our lives better but eradicates the challenges like distraction, disconnection, addiction and over-reliance. This will become all the more important as Gen Alpha matures into next-generation technology users. The next big leaps will be consolidation of technologies and a dematerialisation from hardware to software, data-based solutions and systems infrastructure.

5. Corporate Data Responsibility

Data has become a true extension of technology and underpins each trend in this report. Its opportunities will only truly be optimised when it is collected, managed and applied under a rigorous framework of ‘corporate data responsibility’. Each company has their own distinct data needs and while there is not a one-size-fits-all rulebook, there will be an implied need for policies that manage consent, usage and application with the experience of the audience at the heart.
About Isobar and further reading

We are a global digital agency transforming businesses and brands through the creative use of digital. Our 6,500 digital experts in 85 locations across 45 markets in Americas, EMEA and APAC deliver experience-led transformation, powered by creativity through our end to end service offering. Isobar’s clients include Adidas, Coca-Cola, Enterprise, KFC, Mead Johnson, Nestle and Philips, and is part of Dentsu Aegis Network, a wholly owned subsidiary of Dentsu Inc. www.isobar.com.

Interested in reading more? Explore our insights and thought leadership on the latest emerging technologies and trends affecting digital marketing today.

Extended Reality Playbook

Blockchain Playbook

Creative Experience: The Evolution of CX

Recap Report from Dreamforce
Appendix

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