

# GOOD FUTURES HORIZON SCAN

# RETAIL

**JANUARY 2023**



# FOREWORD

2022 was a year categorised by massive swings between highs and lows for charity retail. At the start of the year things were looking up. Omicron was on the way out, and footfall to highstreet shopping locations was quickly rising back to near pre-pandemic levels. The interest in thrifting and charity shop hauls (partly driven by TikTok, and partly by rising concerns about the cost of living) was continuing to surge in popularity.

By the autumn, the post-Covid retail recovery had slowed, delivered a further blow by the now infamous mini-budget that almost broke the economy. Cost of living bit hard, and retail analysts that had previously been upbeat and optimistic about the future, were taking an about turn on their predictions.

And yet, against this backdrop, charity shops thrived. Data from the Charity Retail Association showed that charity shop sales were up by 10% compared to the same period in 2021.

However, this uplift wasn't completely unexpected (even given the doom year of

2020 lockdowns). Cast your minds back to the crash of 2008, and something similar happened then. Charity shops saw a boom in trade, whilst the rest of the high street suffered. Interestingly, what followed on from this boom was a steep decline in stock donations to shops, as people turned to car boot sales and online trading sites to directly sell their goods.

Whilst we haven't seen this yet in 2023, we are seeing some loyal customers and those most in need potentially being priced out of the market as bargains are snapped up by 'haulers' for resale on sites like Depop, or those in search of a wardrobe refresh, or that vintage find.

In 2022 we also saw the increasing rise of the eco-shopper: they're motivated by wanting to make sustainable purchasing choices, and drawn in by the budget-friendly variety and unique finds that charity shops can offer. They skew towards the Gen Z segment and wear their charity finds with pride. However, they're also the audience who will consciously buy fast fashion when they want to snag a cheap, on trend item. Shein, and Shelter.

This behaviour also plays into another concerning trend of 2023: Buy Now, Pay Later. Despite the rising cost of living and mounting personal and national debt, for a younger generation brought up on a diet of consumerism, Christmas 2022 was characterised as 'buying things they don't need, with money you don't have'. All washed down with a chaser of deferred payments.


On a brighter note, 2023 trends also bring a continued rise of social commerce, generation alpha influencing everything from colour choice (beige) to toy design (think digital integration), and a search for moments of joy to combat the looming recession - chasing the dopamine. There's also good news from a volunteering front, as it's predicted that 2m more Brits will look to volunteer for charity in 2023.

With all that in mind, we hope that this Horizon Scan offers actionable inspiration now, rather than later ●

Daisy O'Reilly-Weinstock  
**Director of Big Bets**




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# DRIVERS OF CHANGE



## Cost of Living Crisis

Fresh off the heels of post-COVID economic uncertainty, last year saw the UK plunge deep into a cost of living crisis, rapidly heading in the direction of a recession. **Whilst we may stave off the recession yet,** for many households the current economic reality is looking bleak.

With families having to choose between heat and food, widespread striking across various industries (**January saw TfL announce another price increase,** but no hint of being open to negotiations with its striking staff), and inflation breaking record highs, the financial outlook for most consumers is not a positive one. Unsurprisingly, this lack of disposable income led to a **brutal year** for retail in 2022.



## Climate Change

2022 brought **serious flooding in Pakistan, extreme wildfires in Europe,** and a **megadrought** that disrupted supply chains across the world (in conjunction with the war in Ukraine). With the suddenly very real consequences of climate change impacting people's homes and livelihoods, new movements have sprung up in an effort to force the hand of governments and business.

Whether it's Biden signing a **new Green Deal,** Just Stop Oil protestors **throwing canned soup at a Van Gogh painting,** or the owner of Patagonia **giving away his company,** it's clear that a higher standard and more urgent action is necessary immediately.



## The (Continued) Rise of TikTok

When TikTok rose to prominence during the early days of Lockdown One, you'd be forgiven for thinking it was just a place for dancing teenagers.

Now, **3.5B downloads later,** the app's **clever algorithm,** short-form content, and aesthetic quality has drawn in the masses (no, it's not just Gen Z, you'll find anyone and everyone on the platform) and positioned itself as the new tastemaker in town. Moreover, the endless scroll and quick turnover of content is driving an extremely rapid trend cycle across anything from clothes to food to pop culture.



# DRIVERS OF CHANGE



## Fast Fashion Addiction

Fast fashion giant Shein rose to the top spot of **world's most popular retail brand in 2022**. Across its website, you'll find £5 tops and £8 jeans, all perfectly curated for the aesthetics of the TikTok era. And, with **trend cycles changing so quickly**, many have turned to the brand's cheap and trendy products to keep up.

The commodification of society isn't new, but it is now being further fuelled by embedded shopping features, influencer driven sales, and rapid turn-around delivery systems. 'I see it, I want it, I buy it'. Mix that in with post-pandemic revenge spending and a cost of living crisis slashing our disposable income, and the rise of Shein starts to make sense. Never-mind the well documented **worker exploitation and extreme carbon footprint** of the model.



## The Changing Face of Age

**About 20% of the UK population is currently aged 65 and over**, with a disproportionately high spending power to match. But the way we think about age - building ageist stereotypes into marketing, making inaccessible and poorly designed products, and relegating those over 65 to the 'seniors market' - is a hangover from the previous century, both offensive to the ageing population and limiting to retailers.

Older generations don't exist in a vacuum - **they're just as likely to partake in post-pandemic and permacrisis hedonism**. In a lot of cases, they're actually **more likely to party**. Sensible Gen Z smokes and drinks less, doesn't take drugs, and has less sex than their older counterparts. It's time to reframe how we think about age.



# 2023 RETAIL MOODBOARD





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# SUSTAINABLE RETAIL

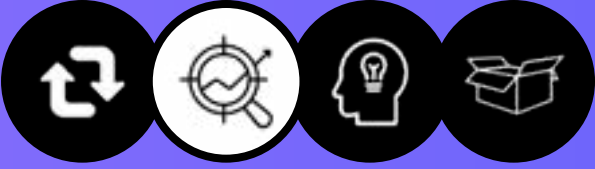


Sustainability is no longer a 'nice to have' or added-value label for retail. It's **fundamental**. Consumers are looking beyond the product, to assess the green credentials of both supplier and retailer. Think everything from materials and point of origin, to microplastics, modern slavery and water pollution. **And they're voting with their wallets.** A 2021 YouGov survey found that **20% of Brits** avoided purchasing items from brands due to environmental concerns.

Greenwashing is being called out across the board, with demands for increased transparency getting louder. Instead of purpose-washed initiatives built for sustainability credits, consumers are looking for **genuine** (and accessible) change that extends across every aspect of an organisation.



# SUSTAINABLE RETAIL – TRENDS



## // What Happened in 2022?

War in Ukraine, continuing Covid lockdowns and **global environmental disasters**, combined to dramatically **disrupt supply chains** across almost all industries, directly leading to the escalating cost of living crisis. Whilst the pandemic may be dwindling, climate related disruptions are only going to intensify in the coming years.

## // The Reaction:

Consumers don't want to bear the burden of rising costs associated with supply chain disruption. They want suppliers and producers to take action now to safeguard their future. **93% of global retail consumers expect the brands they use to support environmental issues**. Also, tighter legislation is **on its way**.



## // Totally Transparent

Last year we saw **HSBC's sustainability ads banned**, KLM get **sued for greenwashing**, and a massive uproar over **Coca-Cola sponsoring COP27**. Greenwashing just isn't going to cut it anymore. Consumers want to see brands' sustainability credentials – they want to know you're walking the talk across every aspect of your supply chain. The way forward is going to be **maximum transparency across all operations**. And, in the event that you got it wrong somewhere along the line, stay transparent and learn from your mistakes.

## // Easy Activism

In the post-pandemic world, **more than half of global consumers** say they want to live a more sustainable life-style. But the average consumer doesn't know the best path towards doing so, and they likely don't have the time

to research or act on complicated initiatives. Good intentions can be taken over by time consumption, price difference, or obscurity. Brands have the power to support this behavioural change, by making their products **accessible, affordable, and easy to use**. Make it easy for consumers to make the right choice.

50% of consumers won't shop with retailers who greenwash.

## // Born Circular

It's not enough to produce a product that can be reused again and again, if its production process relies on fossil fuels or unfair wage practices. 2023 is the year 'reduce, reuse, recycle' become truly circular: products that can be repaired, remanufactured, or recycled after every use, that are sustainably supplied. With pressure for systemic change rising, we're going to see more and more brands and organisations incorporating sustainability into their operations from start to finish. It's not only good for the environment, **it's also an advantage in a retail world hungry for genuine action** •



# SUSTAINABLE RETAIL – CASE STUDIES



## Eco Superstore

In 2022, Aldi **launched a brand new eco concept store** which uses sustainable materials, lower energy, and innovative designs to lower carbon emissions by up to two-thirds. On top of that, they're trialling plastic-reduction initiatives (think coffee refills, carton-less eggs, and BYO-container stations), and introducing a 'hard to recycle' unit, which lets customers recycle items not collected by local authorities, like: coffee pods, batteries, and medicine packets.

**So What:** Aldi managed to wrap up a whole load of sustainability initiatives into their new shop, integrating their climate-conscious approach across the board. But what's got customers talking is that much of the shop's prices are slashed to 5% under standard Aldi prices. It's sustainability made for the inflation crisis era.



## Clothing Repair Centre

Patagonia has launched its **United Repair Centre in Amsterdam**. The centre's goal is to carry out a whopping 300,000 clothing repairs this year, saving one million kilos of textile waste. Any brand that wants to use the centre's services can sign up. Customers simply send their item into the URC, and the brand sends it back good as new.

**So What:** With overconsumption in the fashion industry rising to new highs, change is urgently needed. It doesn't help that over-consumerism has ushered in an era of **badly made products**, which break faster than ever before. One upside of the cost of living crisis is that **more people are trying to repair their clothes at home**. Patagonia's new initiative combines all these insights in their drive to extend their clothes' lifespan.



## Product Impact Labels

L'Oréal is **changing the labels on their beauty products**. Their new initiative lets customers see the relative environmental impact of their products on the label, with a handy comparison to other products in the same category. The plan is to roll out the new system across their brand portfolio, which includes drugstore staples like Garnier, CeraVe and Kiehl's.

**So What:** L'Oréal's in-depth labels give the customer all the insight they need to make up their mind about the brand's sustainability credentials. In a time when any and all sustainability claims are under intense scrutiny for signs of greenwashing, the brand has opted for total transparency. Whether their products come out looking sustainable or not.



# CASE STUDY: TEXTILE DUMPING



## // What Is It?

In January 2023, Traid chief executive, Maria Chenoweth, **put out a statement** saying that Traid shops are not a dumping ground for ultra-fast fashion. With **charity shop dumping on the rise**, and donations piling up far beyond what charities are equipped to deal with, there are growing concerns that the **fast fashion boom and culture of overconsumption are leading to more textile waste** than charity shops can handle.

Charities are urging people to consider the quality of their donations to avoid damaged or unusable goods becoming a burden for the charity retail sector.

## // Why Should I Care?

When donations pile up, the consequences are two-fold.

Firstly, having to sort through and sell unusable donations to rag houses can quickly become a **large financial burden** on charities. In Australia, it's estimated that the national cost of responsible textile waste management comes to about **\$18M per year**. Not an insignificant number. And that doesn't cover the manpower required either.

Secondly, and perhaps most worrying, the more donations pile up, the more likely they are to actually end up in landfills regardless. Most UK charities claim that **zero percent of their clothes will ever end up in a landfill**, but this isn't entirely true.

Take the case of the Netherlands: an estimated **one billion items of clothing are thrown away there every year**, the majority of which go into donation bins. But the bulk of the donated items aren't suitable for resale in the country, so they're sold on to Eastern European secondhand retailers. There, the clothes are sorted again, and what still isn't suitable for the market is sold on to Western Africa. The clothes get sorted once more, and from there are likely to end up in a huge pile of waste.

The biggest secondhand clothing market in West Africa is Kmatmanto Market in Accra, Ghana, where **20M items of clothing** from Western Europe arrive on a weekly basis. **40% of these items will eventually leave the market as waste**. Worryingly, recent data suggests that an estimated **70% of UK secondhand clothing** ends up in this market or similar ones. The ones that don't make it to resale end up in landfills, burnt, or dumped into the ocean, where textiles are piling up sky-high.

At the end of the day, charities are responsible for where their donations go. But as textiles pass through so many different places before they end up in these landfills, accountability gets lost along the way. And it's not just up to charities to make sure textile waste goes down – it's also up to consumers to make sure they're responsibly donating (and responsibly consuming in the first place). But with overconsumption only on the rise, it might be worth having a think about how you can encourage your supporters to donate responsibly, and how to properly recycle their clothes if they aren't fit for donation ●



# THRIFTED FASHION



Vintage is booming. The past year has seen the height of vintage trendiness, the **comeback of the charity shop**, and the start of **luxury brands dipping their toes into resale**.

As consumers are craving more and more sustainable retail, with a cost of living crisis pushing a turn to cheaper alternatives, and a flood of thrifting haul videos on TikTok, the secondhand market is about to go mainstream. While that's great news for charity shops, it also means competition for secondhand retail market share is about to get a lot fiercer.



# THRIFTED FASHION – TRENDS

## // What Happened in 2022?

We were hit by a cost of living crisis, supply-chain issues (think climate crisis-related), and an energy crisis that tilted consumer behaviour on its head entirely. At the same time, TikTok solidified into a new social media behemoth, and positioned itself as the tastemaker of the future.

## // The Reaction:

**Recommerce is having a moment**, across all sorts of industries. It's cost-effective, and doubles as a symbol of ethical commitment to sustainable lifestyles. **Charity retail** is thriving, in contrast to downturns elsewhere in the sector. Brands are picking up resale opportunities, and social media is filling up with endless thrifting tips, tricks, and hauls. Thrifting has become a global phenomenon, and it's expected to **grow a further 127% by 2026**.

37% of thrifters believe that sustainable fashion is mostly greenwashing.



## // Who's Buying It?

In the midst of a cost of living crisis, a significant amount of people are turning to secondhand clothes. Recent data suggests that **38% of people have bought from charity shops instead of retailers in the past three months**, purely due to financial stress. But beyond the cost of living crisis, thrifting has officially picked up trend status, especially amongst Gen Z and millennials – over **68% of them would look for an item secondhand before they'd consider buying new**. Not only are secondhand stores capable of providing for an audience more committed to sustainable and ethical shopping, they're also **uniquely positioned to cater to an increasingly rapid trend cycle** that heavily draws on aesthetics popularised in the 80s to early aughts.

## // Ethical Consumption

For a lot of vintage shoppers, it's a badge of honour as much as it's a genuine commitment to sustainability. In fact, the majority of people who bought secondhand for the first time in 2021 said it gives them **bragging rights**. For the so-called **activist generation**, ethical consumption is both trendy and responsible – their attitudes may have something to do with the fact that they're **coming of age in the midst of ongoing permacrisis** and have a lower chance of a stable future than ever before. It's worth noting that for these consumers, thrifting beats sustainable fashion – **37% of thrifters believe that sustainable fashion is mostly greenwashing**.

## // Long Live The Charity Shop

It's not surprising then that charity shop income is booming. **Sales are up by an average of 10%, and the charity retail sector is estimated to raise around £360M a year for charity**, ahead of pre-pandemic levels. And although we're still seeing charity shop closures, mostly due to skyrocketing bills, many of these are a product of the charity retail sector adapting to a change in consumer behaviour. For example, with the rise of hybrid work; previously busy



# THRIFTED FASHION – TRENDS



office-adjacent areas are beginning to resemble ghost towns with limited foot traffic. And some charities want to **move their shops to bigger premises**, to provide more variety and better customer experiences.

In fact, this past year has seen many charity shops rethink their strategies for the new era of thrifting. We saw the launch of the **national charity shop gift card**, more and more upmarket charity boutiques **curating designer and vintage**, and charities **jumping on Depop** and social media to reach a wider audience. All this to appeal to the new generation of charity shoppers.

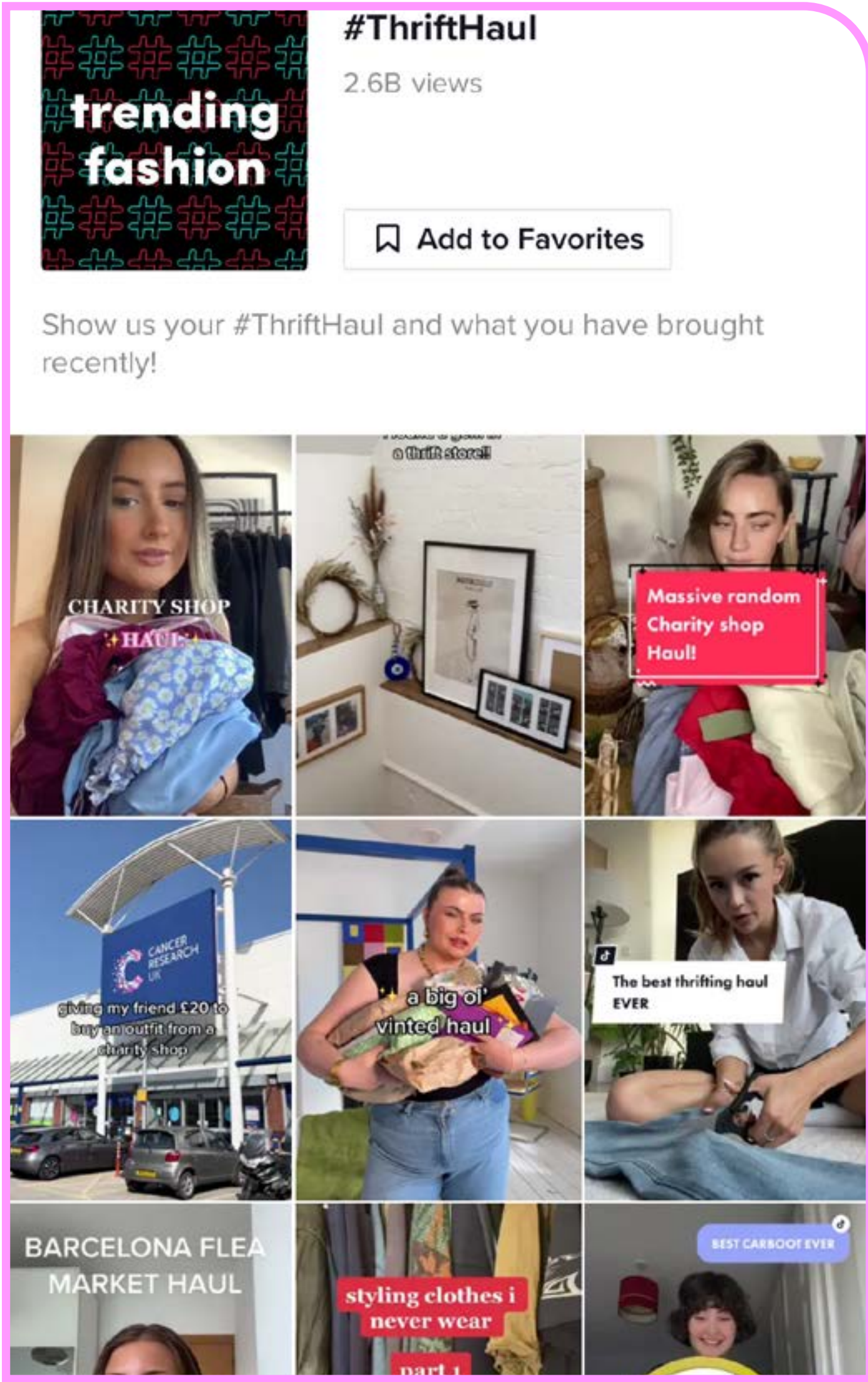
It’s a necessary change for many. With the new and rising interest in secondhand clothes, competition for the charity retail market is only going to increase. Expect more

competition this upcoming year from the likes of recommerce websites, high end vintage boutiques, social media secondhand, and retail brands pivoting to secondhand or upcycling schemes.

## // When Thrifting Meets Fast Fashion

But the future of thrifting is not all rosy. If you open #thrifthaul on TikTok (which has hundreds of millions of views), the fourth video down is captioned “I BOUGHT 50KG OF VINTAGE SWEATSHIRTS”. A little further down you’ll see someone advertising their “massive random charity shop haul.” Even further, you see a girl with her arms stacked high full of secondhand clothes. On some social media platforms, thrifting is quickly turning into a trendy hobby, and it’s **not immune to the consumer behaviours that drive the rise of fast fashion**. Not exactly sustainable behaviour. And with the value of the secondhand market skyrocketing due to demand, charity shops will need to be careful to maintain the balance between the new generation of thrift shoppers and those who rely on the value for money that charity retail has long provided ●

**50% of secondhand sales will happen online by 2024.**





# THRIFTED FASHION – CASE STUDIES



## Boutique Charity Shops

Boutique by Shelter, an upmarket version of Shelter's standard high street charity shop, has become the **first charity shop to bag a spot in a premium shopping development**, sitting alongside the lines of COS, Aesop and Paul Smith. With a carefully curated collection of vintage and bespoke interior design, it could easily be mistaken for a fashion retailer.

**So what:** As younger generations begin clamouring for more upmarket thrifting opportunities, boutique locations and trend-focussed curation is going to be crucial for the charity shop to maintain market share. Expect to see increasing amounts of charities draw inspiration from this model, and increasing amounts of developers eyeing charity shops for their shopping districts.



## Secondhand Dating

As of 2022, eBay has **replaced fast fashion brand I Saw It First as Love Island's official clothing sponsor**. With the aim of capitalising on its audience's increasing love of recommerce, eBay provided all of the wardrobe on the show, as well as hosting a shop-front that directed fans to a Love Island style edit.

**So what:** Just a week after announcing the collaboration, eBay saw a **990% increase** in live listings. Whether the collaboration is a genuine sign of a cultural shift away from overconsumption or a clever marketing move to keep Love Island ahead of the curve (most likely the latter, **the new season features eBay's outlet clothing more than their secondhand**), it paves the way for genuine recommerce retailers to crack into mainstream pop culture even further.



## Fashion Fighting Poverty

Oxfam will be hosting the second edition of its second-hand fashion show during upcoming London Fashion Week this February, titled '**Fashion Fighting Poverty 23**'. The show will feature a variety of second-hand fashion, all of which will be available for auction on eBay the week after the event.

**So what:** At the end of the day, London Fashion Week is about showcasing the most exciting trends, and catering to the appetites of consumers in the upcoming year. Where five to ten years ago many Brits **were still embarrassed to be seen going into a charity shop**, charity retail is now rubbing shoulders with famous fashion houses and haute couture – which only goes to show how hungry people are for more sustainable, secondhand clothing.



# CASE STUDY: THE KINDER SHOP



## // What Is It?

When **The Kinder Shop popup** opened in Cumbria last year, you'd be forgiven for mistaking it for any other high street homeware store. On closer inspection, you would've found that the items for sale weren't valued with money, they were valued in acts of kindness. The popup, funded by The Cumberland Building Society, priced its wares at a set amount of hours to be volunteered at local charities. A BBQ would cost a customer five hours of volunteering, whereas a desk chair would only set you back two.

## // Why Should I Care?

**With the number of volunteers dropping across the UK**, hours are in high demand at many charities across the country. Whilst older volunteers have largely returned to the sector following the pandemic, it's been hard to get younger volunteers to do the same. Changing trends and expectations of younger generations are a key challenge for the sector, as they try to get more people to donate their time.

The Kinder Shop hoped to help close this gap by drawing in younger generations with its trendy homeware – the fact that the ongoing cost of living crisis has slashed people's disposable income lent a helping hand towards converting footfall into volunteering hours. One TikTok video of the shop even hit 150,000 views.

Ultimately, the campaign was a resounding success, securing **1100 hours of volunteering for a total of 27 charities**, many of whom were **first time volunteers**. The Cumberland Building Society garnered some attention for their overarching Kinder Banking campaign, the customers got their homewares for (mostly) free during a cost of living crisis, and the charities got a boost in support and recognition ●

Charity shop volunteers have fallen almost a quarter over the past three years.





# MOMENTS OF HEDONISM

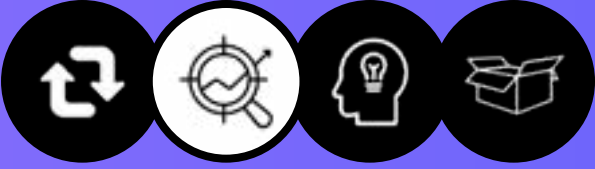


The past three years haven't been the easiest, and the road ahead is still uncertain. We're all becoming used to living in permacrisis. Whilst a portion of Gen Z (and some Millennials) are embracing **apocalypse budgeting and financial nihilism** as a way to navigate uncertainty; for everyone else, searching for small moments of joy in the day to day will become a priority in 2023, to off-set the unrelenting economic, political and environmental doom.

The experience economy is booming, people are spending more on self care or the small everyday luxuries that make them smile, and rave culture is making a comeback!



# MOMENTS OF HEDONISM – TRENDS



## // What Happened in 2022?

Better question – what didn't happen in 2022? To briefly recap: COVID sort of ended, sort of didn't (depending on where you live on the planet), the UK sailed straight into a cost of living crisis, we had three Prime Ministers, four Chancellors and countless reshuffles, war in Ukraine, and record **heat waves, drought, fires and floods**.

## // The Reaction:

Pre-COVID, we were all familiar with serious everyday stresses. Climate change was already looming, income equality was on the rise, and terrorism felt like a serious threat. But the pandemic was the straw that broke the camel's back, and we descended straight into permacrisis. With all those anxieties building up over time, the future seems more uncertain than ever. More and more people are adopting 'live in the now, worry about the future later' mindsets in response.

The global wellness market is worth a whopping \$1.5TR, with annual growth of 5-10%.



## // Now or Never

There's so much going on, most of it entirely out of the average person's hands, that it can feel overwhelming. So what are you supposed to do about any of it? For more and more people, the answer is simple: enjoy yourself as much as you can. Here-and-now indulgence, maximalist excess, and good old fashioned hedonism. Welcome to the pleasure revolution.

Brands are leaning into the **moments economy**, tapping into people's need to break out of the stresses of everyday life and instead dive into a lifestyle of enjoyment. Hedonists want less of a focus on restraint and health, and more bright colours, playful messaging, and riotous events. They want to make memories now, before it's too late.

## // Goodbye Savings

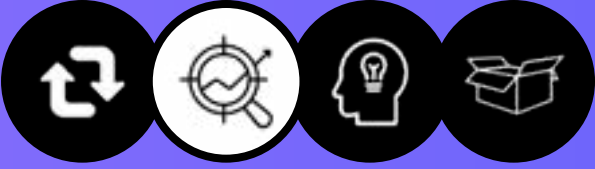
"What's the point of saving if we don't know what the future holds?" That's the mindset that's going through a lot of young people's minds at the moment. Saving amongst younger generations is **down significantly**, but spending is **staying high**. In fact, 45% of Gen Z and millennials don't see a point in saving until things return back to normal. The emphasis is on enjoyment of the right here and now, rather than the future.

People just can't stop spending, even though our disposable income is shrinking. These 'little' indulgences light up the brain's pleasure and reward centres with a hit of dopamine.





# MOMENTS OF HEDONISM – TRENDS



## // Post-Pandemic Treat Brain

During the pandemic, us Brits collectively spent **£40.6B on dispensable lockdown purchases**. That's approximately £770 pp. And it makes sense. Sat at home, unable to spend money on experiences and travel that would normally eat up large chunks of income, bored with nothing to do. But our spending on these things hasn't dropped. The phenomenon has been dubbed the **Treat Brain**: our collective lapse into unrestrained emotional spending.

Think ordering three courses (the most expensive ones) at a restaurant, buying nice candles and expensive skin-care, bath salts, fancy coffee pods, the nice brand of olive

oil you've been eyeing for ages. People just can't stop spending, even though our disposable income is shrinking. These 'little' indulgences light up the brain's pleasure and reward centres with a hit of dopamine.

## // Welcome Back, Rave Culture

And whilst younger generations are spending more on every day treats, older generations are spending more on partying. Forget a night on the sofa with a cup of tea; Boomers and Gen X want to bring back rave culture. In fact, 3.7M Brits over the age of 45 are now going clubbing **once a week**. With the way we frame age changing alongside longer life expectancies, a new life stage has been added between 'boring middle age' and 'senior'. Their kids have flown the nest, bank balances are comfortable, and they're getting divorced **faster than ever before**. Expect older generations to lead the charge on bringing back the rave ●

Brits collectively spent £40.6B on dispensable lockdown purchases.





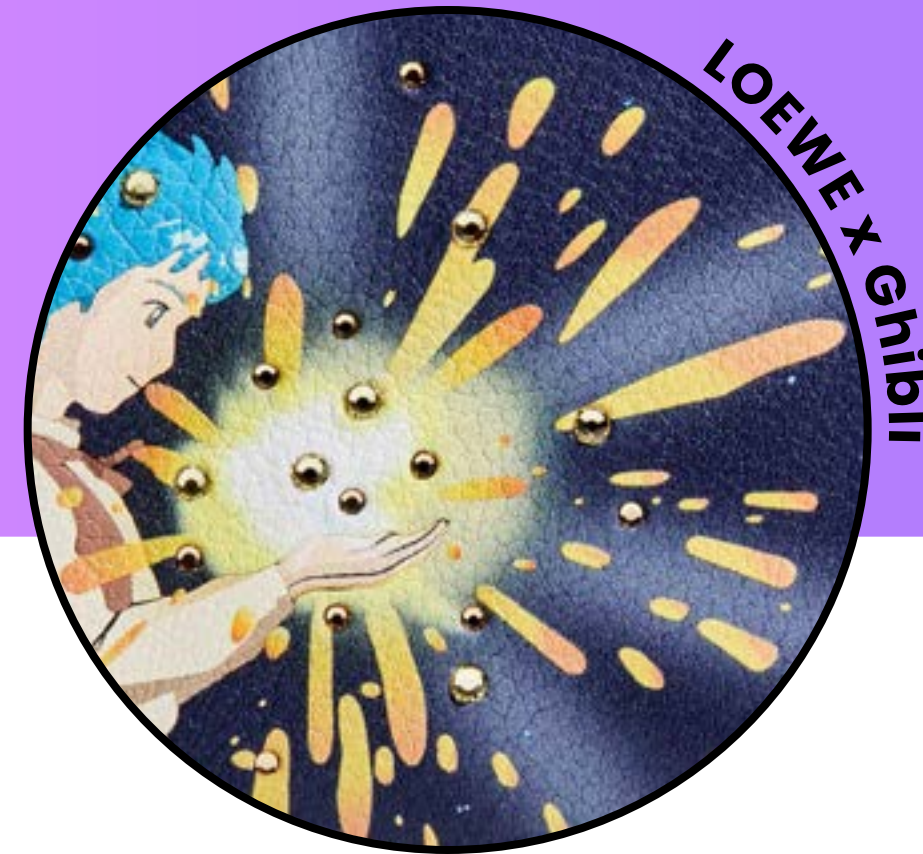
# MOMENTS OF HEDONISM – CASE STUDIES



## Sober Singles Events

Thursday, a new dating app that only works on, you guessed it, Thursdays, has **partnered with alcohol-free spirit brand Caleño** to host a dating event entirely fuelled by non-alcoholic cocktails.

**So what:** Thursday is a dating app that perfectly encapsulates the modern hedonistic mindset – it's only open for swiping on Thursdays, and users only have 24 hours to match, chat, and organise a date. Caleño's product is maybe not the first thing you think of when you consider hedonism – non-alcoholic spirits seem more in line with the health-conscious trends of the past. But by partnering with Thursday, they've managed to align their product as a non-alcoholic option for those of us that want to jump on the hedonism train and be sober at the same time.



## Ghibli Does Luxury

LOEWE has been **collaborating with Japanese film Studio Ghibli**, launching a series of collections inspired by various Ghibli films. The first collab, LOEWE x Spirited Away, was immediately flooded by frantic fans looking to get their hands on Chihiro handbags and No Face wallets.

**So what:** **Luxury brands are booming**, as the UK's richer shoppers continue to spend more freely. Buying that £500 piece of merch instead of the £10 Ghibli t-shirt from H&M? Go on, treat yourself! LOEWE's campaign lands well at a time where we're investing more in our shopping habits, and **medicinal nostalgia** is in full-swing.



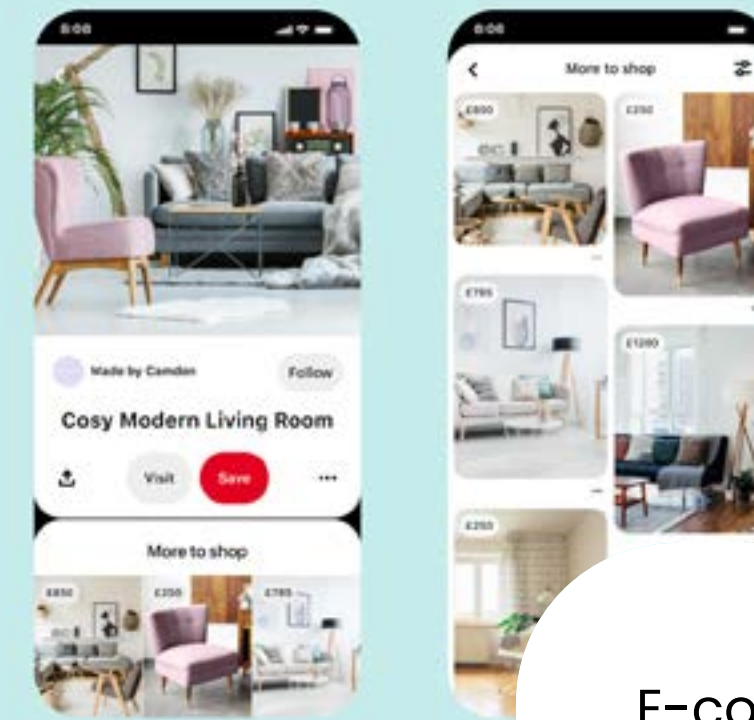
## Cool People Like Cool Things

**Perfectly Imperfect** is Tyler Bainbridge's pandemic-era brainchild. A newsletter based on the simple premise "cool people like cool things." (Think **Nathan Barley** for a Gen Z audience, but with none of the irony). Having garnered serious attention over the past year, the newsletter is a look into what so-called tastemakers and aesthetes are finding trendy at the moment.

**So what:** What does the newsletter tell us about what 'cool' people are into right now? They're into buying small luxuries, experiences, enjoying life, and being unapologetically themselves.



# SOCIAL COMMERCE

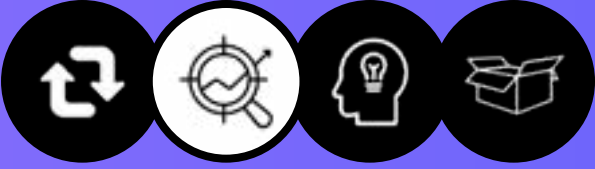


E-commerce has come of age, and TikTok is supercharging a new era of online shopping. The ability to see something served in a post and click straight through to buy it immediately.

The integrated Shop feature streamlines the customer experience, as well as its algorithmic ability to serve up exactly what's on trend in the most aesthetically pleasing way possible; expect social media to become increasingly shoppable this coming year.



# SOCIAL COMMERCE – TRENDS



## // What Happened in 2022?

TikTok shop expanded across the world, with the app quietly filing a trademark for a **future fulfilment centre**. Its plans to challenge Amazon seem to be underway.

## // The Reaction:

The #TikTokMadeMeBuyIt reached **16B views**, and other social media platforms scrambled to keep up.



## // I See It, I Want It

Social Commerce is retail that happens entirely within social media, like the native commerce apps built into Instagram, Facebook, Pinterest and TikTok. The supreme convenience of the algorithm learning your tastes, presenting you with an influencer raving about something it knows you'll love, and being able to immediately press 'buy' on your latest obsession makes a smooth customer journey.

Essentially, the entire process is frictionless. Products exist in the same space as consumers are. On top of that, trusted influencers, comments, and reviews exist in the same space as well. Buying online has never been easier. And the strategy is very effective: **81% of shoppers already research products on Instagram and Facebook, and 48% of shoppers are ready to purchase directly through TikTok.**

Less positive is the potential environmental implications of such a smooth and frictionless customer journey – the ease of online shopping, combined with the efficiency of the algorithm in convincing you that you NEED to buy does not bode well for our overconsumption habits. In fact, TikTok's algorithm is so effective at encouraging shopping, that **67% of users say the platform inspired them to shop** even when they weren't looking to do so.



## // Livestreamed Shop

It's not just social media platforms that are going to change the way we see e-commerce. Livestream shopping platforms (think eBay meets Twitch) are already garnering significant attention abroad, and are poised to **make a move across to the UK** in the imminent future. Amazon recently relaunched its livestream platform, YouTube hosted a holiday event full of shoppable videos, dedicated livestream retail platforms like **Verishop** and **WhatNot** are gaining traction

Livestream shopping combines the overconsumption, algorithmic shopping that we're becoming accustomed to from social media, with the human connection and entertainment that the videos (and the other shoppers) provide. Stay tuned to see how this lands in UK markets ●



# SOCIAL COMMERCE – CASE STUDIES



## YouTube Live Shopping

Video giant YouTube has officially **broken into the livestream shopping space**. In December, it launched its 'From YouTube To You' Christmas-themed livestream shopping event. It partnered with some of its biggest creators to produce ten days of shoppable live videos across a variety of sectors.

**So what:** Of course, in the future, YouTube's goal isn't to shift their top creators towards live shopping. Instead, they're hoping that by leveraging the serious followings of these creators (for example, Mr Beast has a huge **128 million** subscribers) they can entice both dedicated live shopping creators to their platform, and introduce a large section of their users to a new way of shopping. We'll have to wait to see if it pans out.



## AR Fashion

**Snapchat has partnered with Amazon Fashion** to bring to life its new AR-powered Virtual Try-On (VTO) experience. Snapchat users will have access to Amazon eyewear brands, and virtually try on their dream sunglasses through AR filters. They can then check out through the app as well.

**So What:** Amazon AR shopping technology has already existed for a while, with eyewear being a long-time favourite. But with more and more customers living online, Amazon has decided to bring their innovative retail experiences to them. Snapchat's users themselves are no strangers to AR-filters, with the app first **gaining popularity through its famous dog filter** (who could forget). Here's hoping its users still have an appetite for filters.



## Insta Charity Shop

Homelessness charity Crisis UK has introduced their Instagram Shopfront. With the shopping feature being introduced to the platform in late 2020, Crisis is one of the few charity retailers that has introduced the storefront in-app.

**So what:** Moving their collections online lets them meet younger thrifters in their natural habitat – finding inspiration for their next haul online. Not only are they streamlining the shopping process, they're also collaborating with influences and capitalising on user-generated content.



# CASE STUDY: UNRECOMMENDED BY THE ALGORITHM



## // What Is It?

In June 2022, French retailer Fnac launched its '**Unrecommended by the Algorithm**' campaign. The idea? Users would be given suggestions that contradicted their browsing history, subverting the algorithm. 'Unrecommended' items were served up in banners across various websites, and people were also able to access their personalised anti-recommendations on a dedicated site.

## // Why Should I Care?

According to Fnac, **80% of what we read, watch and listen to nowadays is determined by algorithms**. The retailer concerns itself with our slowly eroding cultural freedoms, as more and more of us get pushed into our own little algorithmic echo chambers online. In their words:

"We are living in the age of the algorithms. It's never been so important to nourish the unexpected, search for serendipity and to escape from the recommendation bubble. It's a cultural battle, and a human battle after all."

**Marco Venturelli, CEO Publucis Conseil.**

Fnac, a primarily brick-and-mortar retailer that sells books, music, film, and electricals and is known for their **cultural expertise**, needed to find a way into the online retail sphere. Their digital-first campaign comes at a time where consumers are starting to **feel uneasy about the power algorithms have over us**, and has neatly positioned the brand as an alternative to most impersonal online brands. The brand is successfully adapting to the digital world, but refuses to lose its human touch ●





# BUY NOW, PAY LATER



If you live in a UK city, you'll probably have seen the bright pink billboards advertising the slogan: Buy Now, Pay Later, with Klarna.

Despite post-2008 fears of personal debt, BNPL has convinced a whole new generation to get into credit. Riding the wave of the fast fashion boom, a cost of living crisis pinching our wallets, and a financially-illiterate generation of shoppers, BNPL services are growing and expanding to new sectors in 2023. Prepare for the rise of Donate Now, Pay Later, as well as keeping an eye out for potential legislation surrounding the product.



# BUY NOW, PAY LATER – TRENDS



## // What Happened in 2022?

The end of lockdown restrictions brought post-lockdown revenge spending with it, as people threw themselves into more hedonistic and self-indulgent spending patterns. At the same time, the cost of living crisis bit.

## // The Reaction:

With inflation cutting into disposable incomes, people are **increasingly turning to credit** to buy themselves rewards. As spending continues to be high and overconsumption rages on, companies like Affirm, Afterpay and Klarna have boomed in popularity. From 2019 to 2022, the total value of BNPL loans originated in the US **grew more than 1000%**.



## // Gen Z and BNPL

**Almost half of all young people have used a BNPL service in the past twelve months**. And in the US, almost half of young users have missed **at least one payment**. It seems out of character for a generation characterised as ‘Generation Sensible,’ in part to their aversion to credit cards, but Gen Z loves Buy Now Pay Later. Whilst credit cards are a **huge no go** for most of them, they see no moral distinction between BNPL and debit, happily using it on anything from grocery shopping to luxury items. At the same time, Gen Z users have the **highest chance of defaulting their loans or delinquency**. And yet, the market is only growing.

## // Buy Now, Save The Planet Later

The rising popularity of BNPL services is in no doubt due to the collision of the rise of fast fashion, pandemic treat brain and hedonistic spending, TikTok’s impact on trend cycle duration, and the ease and accessibility of social media commerce. Making it even easier to shop is only fanning the flames of fast fashion and overconsumption. In fact, retailers who use BNPL services can see an average **55% increase in average order value** from shoppers. Data even suggests that **44% of users would have abandoned their shopping carts** if it weren’t for BNPL. Whilst the service has been praised for making shopping more accessible, it’s led to a serious increase in

demand for fast fashion brands. And, at the end of the day, **most of the items get returned** anyways, with consumers using BNPL as a ‘try before you buy’ service. What doesn’t get returned? The carbon cost of delivery and the amount of returns that **end up in a landfill**.

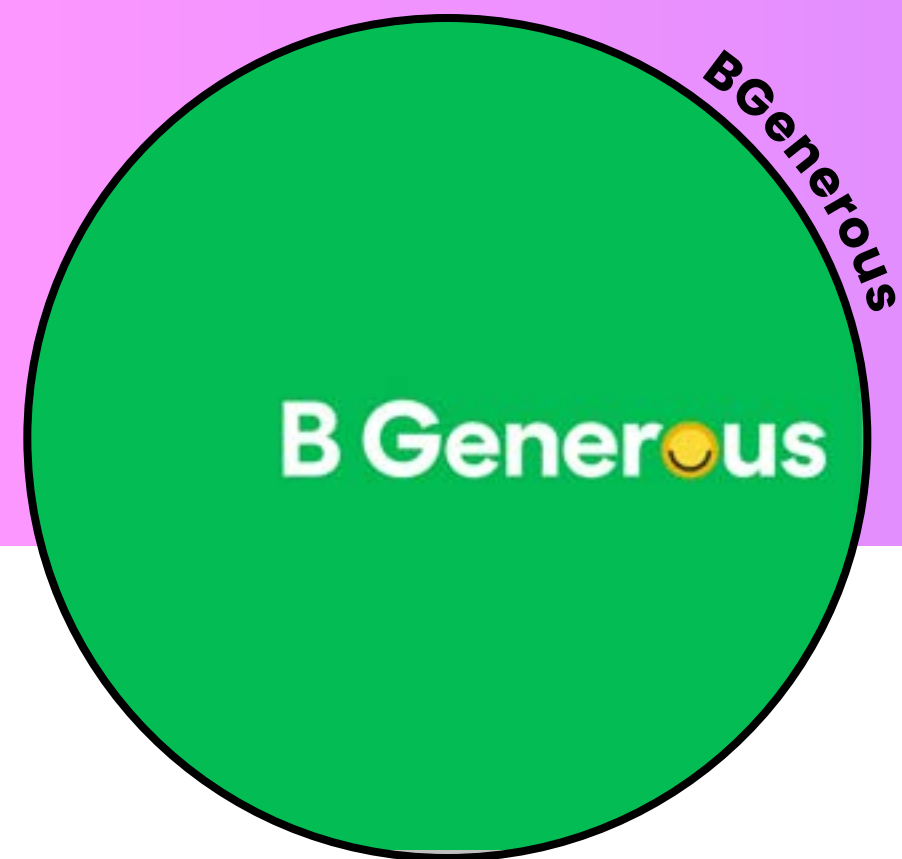
## // Buy Now, Donate Later

So can BNPL still be used for good? Those behind the idea of ‘Donate Now, Pay Later’ **certainly think so**. The idea would be that with DNPL, users could donate to charities in instalments – akin to recurring fits, with the exception that the charity gets the money in one lump sum. It’s a committed repayment duration, which aligns with how younger generations are paying and shopping, and **83% of existing charitable givers** say that DNPL makes it more likely they’ll increase their donations. And, of course, charitable gifts don’t come with return policies or the carbon costs of deliveries.

The question for charities will be whether or not they’re able to mitigate the financial risks for younger donors when it comes to BNPL. On one hand, DNPL allows organisations to accommodate for younger donors, but on the other, it comes with a reputation for fiscal irresponsibility ●



# BUY NOW, PAY LATER – CASE STUDIES



## Donate Now, Pay Later

Fintech-for-good company B Generous has launched a first of its kind **Donate Now, Pay Later** product. The idea is that donors can make a charitable donation to a nonprofit organisation without paying any money at the point of donation, whilst the charity receives the money immediately. In the US, the average online donation in 2022 **came to \$128**, whilst the average DNPL donation came to \$470.67 – a 267% increase.

**So what:** The product holds the idea that people are, even through economic downturn, inherently generous. They just need a helping hand. Riffing off the rise of BNPL to meet younger donors in the middle, they've been very successful at securing new donors, increasing donation size, and decreasing fundraising pressures on charities themselves.



## Financial Literacy

In an effort to minimise the harmful effects of new technologies like BNPL or cryptocurrencies on younger spenders, Australian non-profit organisation Ecstra Foundation has launched the **Talk Money** programme. The entirely free curriculum offers financial literacy workshops in schools.

**So what:** In theory, BNPL and other credit-based products aren't harmful when used correctly – in fact, they can be very beneficial. But there's a gap between the financial literacy levels of their users and the levels needed to use them safely. In the near future, it doesn't look like BNPL is going anywhere. Ecstra is hoping to make it safe for use.



## B2B BNPL

Seeing the popularity of BNPL in consumer commerce, London startup Hokodo is launching a **B2B BNPL service**. Although B2B merchants have been trading on credit for a long time, the new system would digitise and streamline the sales process – as well as significantly speed it up.

**So what:** Given how rapidly BNPL has spread across different aspects of consumer commerce, it's perhaps unsurprising that it is now being adopted as a payment method across different industries as well. If Hokodo's marketplace proves successful, BNPL systems could significantly reduce the amount of time organisations spend buying products for their operations.



# BRICK AND MORTAR

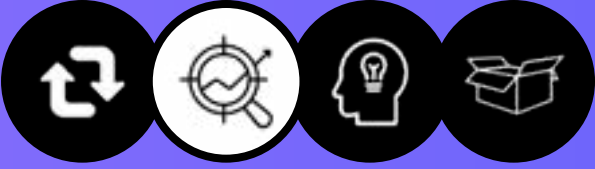


Brick and mortar stores have not had the best few years – competing with e-retailers, soaring rent prices and oversaturated markets. Fresh off the back of a pandemic that forced many to close their doors for the better part of two years, those who were hoping for foot traffic in the high street in 2022 were disappointed.

But the brick and mortar store is very much still alive. At least, the brick and mortar store that is willing to invest in crafting the perfect experience for its customers is still kicking. Experiential stores that also manage to match the efficiency of e-retailers will keep customers coming back in 2023.



# BRICK AND MORTAR – TRENDS



## // What Happened in 2022?

Brick and mortar stores continued to suffer from **poor retail spending**, as inflation continues to rise. Footfall stays low, at **11.1% below 2019 levels**.

## // The Reaction:

The high street is getting creative with new ways to entice customers into their shops regardless. Shops are becoming more efficient and more experiential.

81% of shoppers are willing to spend more in stores that offer rich experiences.

## // Experiential Stores

The experience economy is on the rise – **59% of consumers now expect retailers to dedicate more store space to experiences**. From in-store cafes and monthly mending clubs, to book clubs, running groups and yoga classes; in-store experiences can bring a product to life, or engage new consumers. People come for the experience,



and stay for the wares – and a shop-in-shop arrangement can lead to **splitting overhead costs**, which is never a bad idea during an ongoing rent crisis.

Essentially, customers just want their shops to use their spaces creatively. Beyond offering experiences, retailers are angling for interesting locations, repurposing warehouses or factories, or even growing their products in-store. Just look at IKEA: they've introduced vertical farms in their German stores, where they **grow the herbs needed for their restaurant's food**.

## // Efficiency

With the rise of e-commerce, consumers have become accustomed to a **standard of efficiency** and automation that brick and mortar stores have historically lacked. The online experience allows you to check out without queuing, at the touch of a button, behind a screen, without any

human interaction. More and more retailers are trying to emulate the convenience of e-commerce in their own shops. Think of **dematerialised shopping aisles** with digitised product catalogues, or **checking out on your phone in-store**.

## // Magic of The Charity Shop

The charity shop **has an advantage over the average retailer** when it comes to the experience economy. When done right, the magic of walking through a charity shop is uniquely experiential in and of itself, at times feeling like a treasure hunt. In future, charity shops will need to continue to tap into the sense of discovery, surprise, and escapism that sets them apart from the average high street shop to begin with ●





# BRICK AND MORTAR – CASE STUDIES



## In-Store Tech

Sustainable fashion brand Reformation has brought its concept stores **to the UK**. Their shops feature a limited catalogue being displayed on the shop floor, with **screens on the walls and in fitting rooms** showing the full collection. Customers can order sizes to their fitting room and pay through the touchscreen.

**So what:** Reformation is tapping into the need for a more streamlined shopping experience. Ultimately, they recognise that shop assistants in-store can get distracted finding sizes or putting back stock, and can't give the same level of personalisation and inspiration that customers get online. The solution: giving customers the tools to build their personalised shopping experience. Bonus points for showing the **carbon footprint of every product** on the screens.



## Chatty Checkout

Dutch supermarket chain Jumbo has introduced the **Kletskassa**, or 'chat checkout' in their stores. The slow checkout lanes accommodate customers that aren't in a rush and could use a chat with the cashier. They've also introduced chat corners, where shoppers can gather over a cup of loneliness. Their aim: making residents feel less lonely.

**So what:** It's certainly true that a lot of shoppers are craving efficiency and speed in their shopping experiences, but this doesn't extend to everyone. For some of us, the digitisation of the high street can, at times, feel isolating. Jumbo has found a unique way of integrating a different experience into their shops that offers connection to those who need it.



## Stores As Art

At first glance, the **Omega Mart** in Las Vegas may look like any other American grocery store. But upon closer inspection, you'll find a rather otherworldly experience, built into a 52,000sq ft interactive art installation. Designed by immersive experts Meow Wolf, the store gives a glimpse into the future of experiential retail.

**So what:** Though not technically a retail store, the concept isn't far away from what the experiential retail store of the future might look like. Beyond the Las-Vegas-does-Blade-Runner aesthetics of the installation, it offers in-store games, puzzles and distractions, as well as ultra-personalised shopping – if you want to buy a personalised bottle of bleach, this is the place.



# CASE STUDY: LOVE NOT LANDFILL



## // What Is It?

Eco-fashion campaign **Love Not Landfill hosts a second-hand fashion pop-up** to raise money for charity. The campaign, run by ReLondon, encourages fast fashion buyers aged 16-24 to shift their focus to thrifting, and give up the 'buy it, wear it, throw it away' model. Various charities have partnered with fashion influencers to curate the selection, and the pop-up will feature a mend and repair station to learn about upcycling.

## // Why Should I Care?

Thrifting is cool again, and whilst some charity shops have got the memo, others seem to be lagging behind a bit. The idea behind Love Not Landfill is to capitalise on the **seven million Gen Z-ers living in London**, by bringing the thrifting trend to a location catered to their aesthetics and spoken in their language.

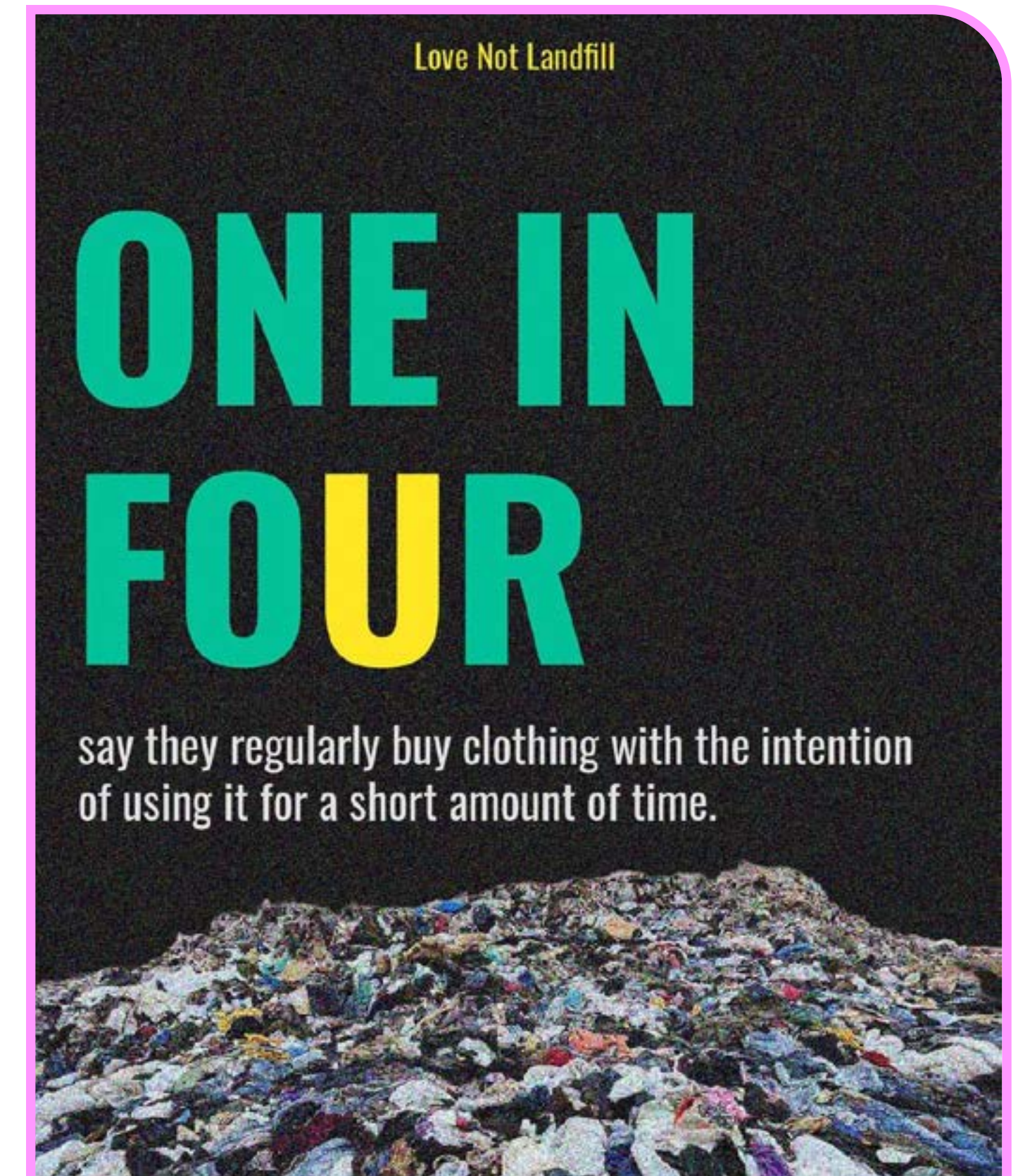
Clothes are curated by influencers and branded as 'Edits' - adopting the language of influencer-collaborations with fast fashion brands - and selected to be in line with Gen Z trends. The shop itself was built to be a place where Gen Z would actually want to spend time: clean, spacious and slick, stocked to the brim with cool secondhand clothes.

Even better, Love Not Landfill changes up what it means to be a brick and mortar charity shop. It doesn't just look good, it also provides experiences for its customers. The space ran tactile maker workshops each night, with events like Barnardo's x Charity Fashion Live running upcycling workshops to the soundtrack of a 90s throwback DJ.

You might be wondering if all this turned out any results? The first iteration of the popup made **£15,000 in four days and drew in 2500+ customers**.

## // Keep An Eye Out

Later in 2023, the even more ambitious **Charity Super. Mkt** is opening, bringing together 10 UK charities under one roof for a collaborative pop-up shop in the former TopShop store at Brent Cross ●





# GEN ALPHA

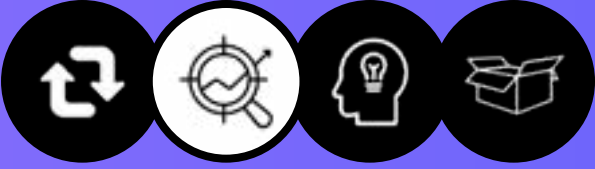


By 2025, there will be **two billion Generation Alpha**. Classified as those born between 2010 and 2026, this new generation is going to be driving retail trends for a significant chunk of the near-future. Right now, it's mostly their parents - a new generation of millennial parents, with the occasional Gen Z parent mixed in - who control the purse strings, but expect this to change quicker than anticipated. Nearly half of kids between ages six and sixteen **already have access to an Amazon Prime account**.

So what do we expect from Generation Alpha? In the near future, a lot of alignment with millennial buying behaviours (think gender neutral childrens' retail, a demand for sustainability and accessibility), and expect a heavy emphasis on digitisation and social commerce from the first fully native e-generation.



# GEN ALPHA – TRENDS



## // What Happened in 2022?

The millennial generation are currently the **biggest demographic group** amongst current generations, and are now raising their own kids. This is the generation that **largely entered the workforce in the wake of the financial crisis, and grew up with significantly different social values to their parental predecessors**. They're the first generation of parents with **significant social media presence**, with the generational technology gap closing quickly. And Gen Alpha is the first generation to be born into a complete tech ecosystem; they'll not only be influenced by their millennial parents, but also by the Gen Z content-creators that populate their feeds.

**D.O.B: 2010 – 2026**  
**In Case of Emergency:**  
**Millennial Parents**  
**Likes: Roblox, Ethical Retail,**  
**iPads, YouTube**  
**Skills: e-Native, High**  
**Spending Power**



## // Sustainable Toys

There might be two billion members of Generation Alpha by 2025, but the vast majority of them will be kids for a while to come. Most of us, when we were kids, would have grown up playing with Barbie and Lego – and this isn't changing any time soon. Despite technological advances, millennial parents keep spending money on analogue toys. And in order to appeal to their value-based shopping habits, toy producers are leaning into high demand for sustainability. For example, Barbie-producer Mattel has launched a **recycling programme** which lets families return their old products to be made into new ones; whilst Lego has unveiled sustainable **bricks made out of sugar-cane plastic**.

## // Generation Androgynous

Driven by both Gen A appetites and their millennial parents' beliefs, the youngest generation is likely to buy **increasingly gender neutral clothing**. With millennial parents trying to raise their kids slightly further away from the gender binary, and their Gen A kids following in Gen Z's footsteps to adopt more androgynous trends, plenty of brands are already **future-proofing for this**. From **PacSun launching their gender neutral children's brand**, to **California enforcing genderless retail by law**, or even Prada flogging **gender-neutral NFTs**, expect more of this in the coming years. Even so, there's a while yet to go before brands catch up with consumer expectations of what gender neutral is. Take PacSun's children's line – their take on gender neutral clothing consists of plain t-shirts and baggy hoodies. Type 'skirt' into the search, and you'll exclusively find womenswear. This all to say – consider adopting the gender-neutral shopping aisle.

## // Accessibility First

Similar to the activist generations that came before them, Gen Alpha's disrupted growth trajectory due to permacrisis, as well as growing up in a time of constant access to all the information all of the time,



# GEN ALPHA – TRENDS



is likely to drive the generation towards **impact-based buying**. Both Gen A kids and millennial parents are demanding more inclusivity, better representation and access for all. The backlash for not keeping up with these standards is going to be swifter than ever. Case in point: **Sony just released their first accessible controller**.

## // Born Online

They might as well have been born with an iPhone in hands – Gen A is the first **fully native e-generation**, growing up with an unprecedented immersion in technology. With **nearly half of kids between ages six and sixteen already having access to an Amazon Prime account**, they've already got more buying power than any other generation did at the same age, purely through their

technological access. In future, it'll be crucial to reach this generation where they reside: online. Moreover, they'll likely adopt their shopping habits from the social media they're weaned on, so the TikTok rapid trend cycle, influencer brands, and Instagram shops are unlikely to go anywhere.

64% of Millennial Parents say they play video games together with their (Gen A) children.

## // Keeping The Metaverse Alive

While the metaverse has taken serious hits to its credibility in the past year, if there's one generation that will be living in some version of web3, it'll be Gen Alpha. If we consider Roblox to be a crude, early version of the metaverse, they're already there. **Over half of kids aged eight to eleven regularly play Roblox**, and together with similar sandbox games Minecraft and Fortnite, they make up three out of the top four most played games amongst Gen Alpha. Brands that want to catch the early worm on building loyal relationships with young consumers have already been moving their marketing onto Roblox ●





# GEN ALPHA – CASE STUDIES



## Biodegradable Toys

In a push to be more environmentally sustainable, Lego has begun making some of its bricks out of **sugarcane plastic**: a more sustainably sourced and biodegradable material. The toy company has partnered with WWF for guidance on how to responsibly farm sugarcane.

**So what:** Although it currently only makes 150 of its elements out of sugarcane, Lego plans on being 100% biodegradable by 2030, and has made genuine efforts towards meeting its goal. **In a \$90BN industry that produces approximately forty tonnes of plastic for every \$1M of revenue**, there is a surprising lack of sustainability innovation. Brands that can set themselves apart have a higher chance of appealing to environmentally conscious millennial parents.



## Gender Neutral Makeup

**Tom Daley is Rimmel's new brand ambassador** – the first man ever to step into the role, following the likes of Kate Moss and Cara Delevigne. The campaign will promote Rimmel's new foundation products.

**So what:** As our perceptions of gender norms shift towards broader inclusivity, the demand for makeup is increasing across different genders. Rimmel is looking to cater to a younger generation that's increasingly less concerned with the gender binary, by taking steps towards better representation of what a makeup-wearer looks like in today's day and age. On YouTube, finding a male makeup artist or influencer is easy, there's plenty – it seems the industry is finally starting to catch up.



## Branding The Metaverse

Chipotle has launched its metaverse debut on Roblox, with **Chipotle Burrito Builder**. Like most Roblox branded content, the Chipotle experience is an immersive game that allows players to complete challenges (in this case: rolling burritos) in exchange for in-game currency.

**So what:** Unlike most other Roblox branded content, this is the **first collaboration** that allows Roblox users to exchange their in-game currency for real-life items, namely a real burrito from Chipotle. Given the huge success of Roblox amongst young teenagers, it's no surprise that brands are investing in building brand relationships with young Gen A consumers in their native (online) environment.



# BUT REALLY... SO WHAT?



## 1// Help Customers Take Action

Their purchase is just the first step. What more can you do to help people take action on climate change? From positive purchasing choices, to holding big brands to account. They're looking to you to help guide, advise and empower them to create a better future.



## 2// Be Transparent

Showcase your sustainable credentials. Be transparent about your supply chains. And where you don't know, be honest. But most importantly, engage your customers in the conversation. Help educate them about the circular economy, and the role their purchase from you is playing in combating fast fashion, or unethical supply chains.



## 3// Leverage Your Expertise

You've validated your green credentials, and scoured your supply chain. So why not leverage that expertise to help other businesses do the same? Corporates are looking to charities to help them validate and prove their sustainable credentials.



## 4// Stories to Drive Repeat Purchase

They may have crossed your threshold in search of a bargain, but that doesn't mean they need to be a single-visit shopper. Be creative about how you tell your story and how to connect them to the cause. From the pre-loved story behind a donated item, to the impact their purchase will have on your mission, leverage all opportunities to connect.

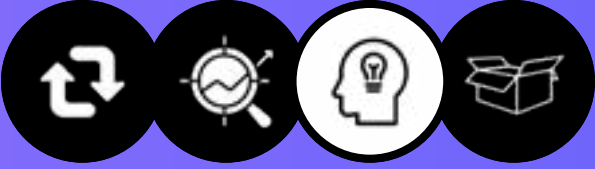


## 5// Rethink Volunteering

**2023 is set to be the year of volunteering**, with 1 in 6 people aged 18-34 planning on volunteering this year, bringing 2.5m new volunteers to the third sector. These volunteers will have different availability, expectations on commitment, skills and experiences to offer. How can you leverage this and make them feel welcome in store?



# BUT REALLY... SO WHAT?



## 6// The Power of Curation



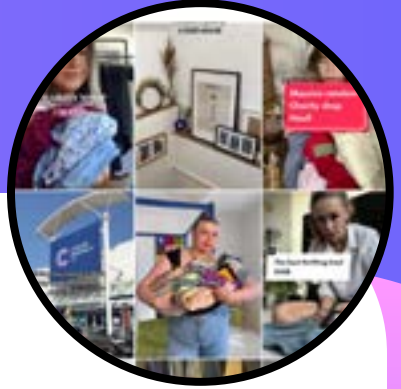
Match your product offering to your audience. From vintage sections, to trend-themed windows, to BookTok linked displays. Know your location, know your audience, and appeal to their appetites. And don't be scared to try new things. Like the **Crisis shop on Brick Lane**, which recruited a graffiti artist to bring a pop of colour and local flavour to their windows.

## 7// Be Social



TikTok has seen a new generation discover the magic of charity shop fashion. So meet your customers where they are, and showcase your shop. We know that charity social media can be a brand nightmare to navigate, but being authentic, present and part of the conversation can help bring new customers through your door and to your cause.

## 8// BookTok



Have a wall of books you can't shift? Selling last year's Christina Lauren for £1? Take a look at BookTok to see what's trending, who's big and what might be the next sleeper hit. Why not start an in-store book club, or take a leaf out of Waterstone's and add staff recommendations to the shelves?

## 9// Tap Into Hedonism



Look for ways to tap into the dopamine and offer people little moments of joy. From carefully curated till point purchases, to a self-care section that can entice the lunchtime shopper. Budget friendly bargains on your shop, Depop store or Ebay marketplace.

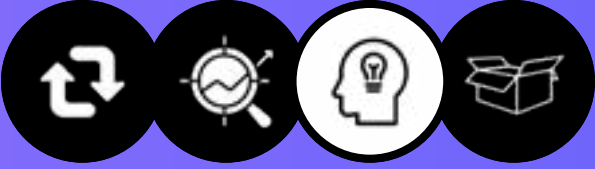
## 10// Hedonism Meets Sustainability



Combine hedonism and sustainability to help pleasure-seekers lessen the guilt associated with consumption, by offering sustainable and budget friendly forms of pleasure.



# BUT REALLY... SO WHAT?



## 11// Cost of Living

The cost of keeping the lights on has gone through the roof. What role does your bricks and mortar store play in both helping support your local community, and communicating the rising cost of delivering your mission? Do you have an opportunity to help educate shoppers about the risks of 'buy now, pay later'?



## 12// Make the Most of Your Space

When CRUK launched their 'superstore' concept in 2016, it included additional services like: a nurses hotline and private information booths. How can you make the most of your bricks and mortar locations, by offering additional services and support functions?

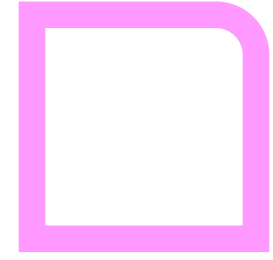


## 13// Gender Neutral

Could you appeal to a younger shopper by doing away with a binary view on gender? Rethink stock division, merchandising and models.

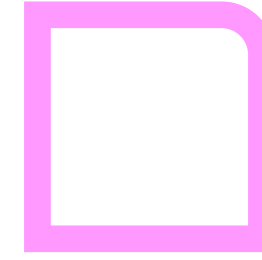


# CHECKLIST



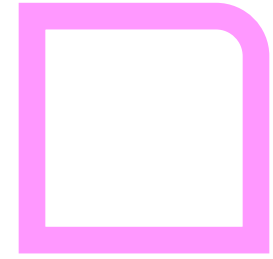
## Make The Most of Your Sustainable Creds

Showcase your sustainable credentials at every opportunity. Tell the story of your supply chain & the impact a purchase can have. Stuck on how to integrate your impact? Check out [our work with Aviva](#) to 'bake' sustainability into their products for inspiration.



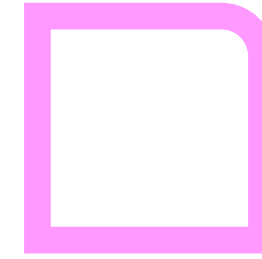
## Recruit New Volunteers

Think about your volunteering offer. How can you engage the 18-34 audience who want to volunteer this year? Not sure? Consider [Good Innovation's work on onHand](#) for some insight into how we can help you level up your volunteering offer.



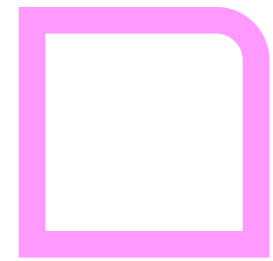
## Know Your Customers

Update your segmentation and keep your audience insight fresh. Get to know your customers. [Click here](#) for a look at how Good Innovation could help you with audience insight.



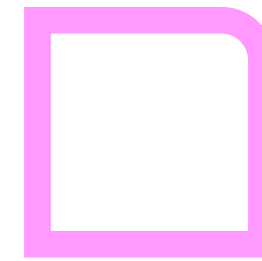
## Curation, Curation, Curation

Make the most of your stock by curating to evolving trends and fads. And keep it up to date and seasonal. Not sure how to curate for your audience? Check out an example of how [GI got to the bottom of Gen Z audiences](#).



## Build A Social Presence

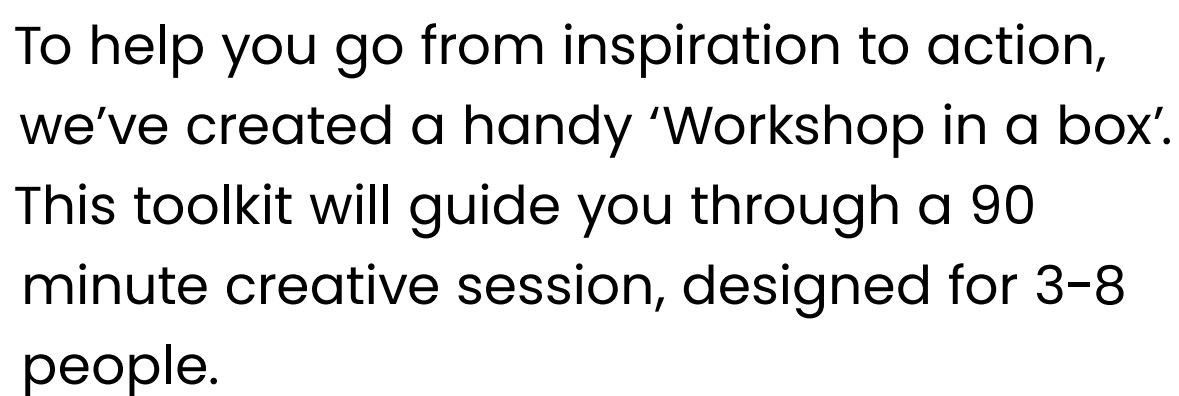
Showcase your shop, connect with your community and build your brand presence on the virtual high street. Need some inspiration for how to tap into your (online) community? Check out an example of GI's community-focussed work with the [Royal British Legion here](#).



## Moments of Joy

Tap into the need for little moments of joy by offering affordable treats, self-care and till point purchases. Good Innovation can help you integrate these moments into your customer journey: dive into the work we've done with WWF adoptions for a taster of [our supporter journey projects](#).





1. Part one is designed to help you quickly problem statements to ideas, using trends as inspiration and fuel.
2. Part two helps you select the most

**Download the kit here** or visit the **Mural**.



# CONTACT US

Want to discuss how you can use the horizon scan as an opportunity to innovate?

**We're here to help.**

Get in touch.

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