The Consumer Goods Experience Reimagined

What really matters to consumers has changed fundamentally. With new preferences, behaviors and habits likely to continue beyond the pandemic, consumer goods businesses must evolve their propositions to build the deeper, more relevant and inclusive consumer relationships on which future success will depend.

Much about what we value, how and where we shop has changed permanently as a result of the pandemic. People are now living differently, buying differently and — in many ways — thinking differently.

Our spending priorities have shifted – we are buying more essentials, for example, and also more local products from local businesses. We have embraced ecommerce. And we have grown used to many more of our purchases being delivered to us at home.

Today, most consumers are making at least one lasting change to how they live, work and play, our internal research shows. Now, with no sign of going back, the time is right to reimagine the consumer goods experience.

By listening and responding to today's adapting consumer, consumer goods brand owners have an opportunity to build greater depth and relevance into their customer relationships and to outmaneuver future uncertainty.

This entails organizing the whole business around the delivery of exceptional experiences, which is what we call the Business of Experience. It entails the rewiring of the consumer-facing functions of the organization – marketing, commerce, sales and service. The Business of Experience is an approach that allows organizations to become consumer and customer obsessed and reignite their growth.

Here, we identify two key CPG opportunity areas which are ripe for experience reimagination.

1. **Design for belonging**
2. **Track, trace, trust: The future is transparent**

The way we live now

Many people are still experiencing altered personal circumstances. Some may have saved money by not being able to go out, and others are worse off for being furloughed or losing their job. With many spending more time conducting more shopping and other daily activities – work, education, play – from home, connections to family, home and local community have strengthened.

As a result of all this, many consumers are redefining what they value and how, when, where and why they shop. They are buying different products. They are buying through channels they may not have used before. And many of these shifts are likely to continue beyond the pandemic.

Human trends:

Long-established behaviors such as the daily commute and in-person shopping have been disrupted, reducing the exposure brands depend on. In the face of an ever-growing barrage of digital communications from brand owners, consumers are becoming pickier about those they choose to engage with.

Recurring lockdowns, habits picked up from the pandemic and social restrictions continue to drive an increase in shopping online and atomizing the shopping experience into micro-moments spread throughout the day and across devices. The lack of many of the sensory cues on which people rely in a physical retail environment has changed how consumers approach buying decisions.

Conscious consumption, shopping local and ecommerce have all grown significantly over the past year and look set to continue.

Some 62% of consumers think the pandemic will increase their focus on environmental issues moving forward, while 79% think it will increase their longer-term focus on health.[1]

Meanwhile, 46% of consumers expect to sustain their increased purchase of locally sourced goods during the pandemic once it is over, while the same proportion expect to continue to shop more from local outlets or suppliers.[2]

New ecommerce users increased their usage of the channel during the pandemic by 156%, and plan to continue similarly after it has passed, according to Accenture consumer research.[3] Shoppers are buying through text messaging and social media platforms. Brands are selling direct to consumers.

Consumers have increased use of omnichannel services such as home delivery, chat features and virtual consultations, and are highly likely to continue using these in the future.

Further, consumers are seeking greater relevance from increased personalization from the CPG brands they choose to engage with. And they are looking to consumer goods brand owners not to solve their problems but to enable them to create for themselves to meet their own needs.

In today's multi-faceted omnichannel world, those organizations with a brand presence that is purposeful, inclusive and integrated across all channels will be the winners.

Business trends:

Having iconic power brands is not enough to command consumer loyalty or drive growth. End-to-end consumer and customer experiences will be needed that, besides being digitally enabled, are cost effective, add value, engage and delight. To do this, consumer goods organizations must deliver on a purpose and prove to consumers that they say what they do and do what they say.

Brand relevance to consumer values will help brand owners strengthen relationships (as trust is in short supply) and differentiate in a crowded market. To thrive in the new era, they will need to explore relevance further – dynamically adapting and making sure they have the right portfolio of brands to be enduringly relevant to consumers and customers.

Increasing complexity in the consumer path to consumption requires greater focus with. And they are looking to consumer goods brand owners not to solve their

problems but to enable them to create for themselves to meet their own needs.

For example, they must accelerate the move towards Artificial Intelligence data-driven reinvention, including new ways of working.

Consumer goods organizations must deal with the unprecedented pressures their supply chains are now under to meet new demands, which is placing stress on business models. They must understand how to get value from existing assets, how to play in the ecosystem with other business-to-business players, how to manage an experience the company is not in sole control of and how to design for resilience and uncertainty.

Consumer goods leaders who scale data, analytics and AI strategically outperform their peers, our internal research shows. This allows them to integrate the end-to-end analytics organization, set up new future-fit ways of working to sense and respond with agility and speed to previously unforeseen value chain disruption.

Ultimately, CPGs need to change how they operate to unlock value and enable new growth by launching new capabilities and streamlining existing ones.

A final thought

Now is the moment to reinvent consumer goods business models and reintegrate the value organizations provide into a new societal landscape. The time to shape a mindset of bold business transformation powered by new approaches to technology and responsible leadership is underway.

Organizations that set a high ambition level for human experience and embrace meaningful innovation will grow and sustain their mission while leading to a positive shift in the industry.

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Design for belonging

For years, consumer goods (CPG) brands have set standards for what 'normal' means in product offerings and stuck to them. But at a time when equality, diversity and inclusion have moved centerstage, the pressure is on to evolve beyond one size fits all. Powered by inclusive design, CPG businesses have an opportunity to reimagine their products and services, experiences and propositions to be inclusive to all.

What's going on

Concerns about inequality grew significantly in recent times – driven as much by the renewed global energy sparked by the Black Lives Matter movement in the United States as by the unequal impact of COVID-19 felt around the world.[1] Inclusion and diversity (I&D) continues its rise up the business agenda.

Yet despite this, shopping for products if you do not fit the standards imposed by different industries and societies can still become a journey of exclusion.

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Imagine a person of color buying beauty products designed by a Eurocentric brand that offers nothing but options for people of white skin and blond thin hair. Or a person with any sort of disability browsing for items such as shoes, home furniture or even video games – none of which has been designed with accessibility in mind.

Or, perhaps, a person who just does not fit the 'S, M, L' options of many clothing brands. Though such consumers exist and are willing to shop and connect with brands, they all too often feel brands and stores ignore their needs.

For years, consumer goods companies have set standards of what 'normal' means when it comes to product offerings. One-size-fits-all products and stereotypes have become common across many different industries and heavily reinforced through marketing and communication. Today, the idea of companies telling consumers what they should buy, eat, look and behave like is no longer acceptable – especially when a certain product category makes a particular consumer group feel left out.

Previously ignored and underserved markets of consumers are finally able to tell their stories on social media to show that there are significant numbers of consumers out there whose needs are currently unmet. Accountability and callout culture are pushing businesses to rethink the inadvertent exclusion around their culture and offerings. Further, COVID-19 has made us all more aware of the importance of mental health and social responsibility which, in turn, has impacted how we view companies.

Excluding people is bad business for brands. Consumers are more likely to consider and purchase from companies they consider inclusive – especially for product categories that once made them feel excluded.[2]

They are more likely to see brands that include them as relevant – a key business driver. Relevant brands grew 5% more than their counterparts, according to BrandZ's analysis of the top 100 most valuable global brands which showed from a value perspective, relevance was the most differentiating feature.[3]

Further, inclusive ads affect consumer behavior. In a joint study from Google, Ipso and Female Quotient, for example, 69% of black consumers say they are more likely to purchase from a brand with advertising that positively reflects their ethnicity.[4]

At a time when brands are paying more and more attention to responsible business drivers and investing in areas such as self-care, wellbeing and positive thinking, now is the time to eradicate exclusion in CPG.

CPG companies need to embrace I&D beyond human resources to expand their product portfolio by making it more inclusive and accelerating towards equality.

They need an approach to I&D that goes beyond Employee Experience. And they need to embed it in portfolio creation and management, provoking impactful disruption in product development process – shelves rearranged to meet all colors, sizes, diets, mindsets and individual tailored needs, for example.

To achieve this, they must see Inclusive Design as an integral part of business.

What's next

I&D will go beyond Employee Experience to become ingrained in portfolio creation and management. Companies will use Inclusive Design, Universal Design and Accessibility throughout the entire R&D process to achieve better results while including new consumer groups.

Designers will partner scientists, engineers and communication teams to bring new voices into the product creation process. This can happen through co-creation workshops involving consumers, listening hubs or inclusion-focused qualitative research. Companies will also have to reassess their culture to find purpose while doing this, ensuring I&D is built into their DNA and spread across the organization.

Portfolio, packaging and shelves will be rearranged to meet all colors, sizes, diets, mindsets and individual tailored demands. Further, retail brands will have to reassess their service ecosystem to make sure all consumer-facing channels are hardwired

for equity. From eliminating bias from artificial intelligence to the use of inclusive language and addressing racial profiling, there is a long roadmap ahead for the years to come.

Reimagining the experience around consumer goods includes breaking industry boundaries and responding to previously ignored consumer needs. This shift can lead to new users interacting and connecting with brands and expanding products built on purpose.

CPG companies' main focus should be giving consumers choice where once there was none. For many markets, this will mean offering products that free consumers from being dependent on niche brands or specialist stores.

As more products are designed to be inclusive, build confidence and a sense of belonging in consumers from all walks of life, industries will be redefined.

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Opportunities for reimagination

1. Portfolio expansion

Creating new products and product lines or reassessing those currently available is one way to reimagine the experience in order to connect with a broader range of consumers. New York-based apparel brand Universal Standard, for one, has built an entire business on offering sleek, minimalist items to a full range of consumers – its jeans come in sizes ranging from 00 to 40.[5]

The beauty industry – mainstream hair brands, especially – are under particular pressure to expand their products and cater to people of different skin tones and hair types.[6] The success of the Fenty brand – which from day one positioned itself as a diverse brand for diverse people using social media to connect to people in unfiltered and organic ways – is a powerful example of this.[7]

Portfolio expansion, however, offers opportunities for any CPG business.

Consider Band-Aid, which recently expanded its lines with bandages in a wider array of tones to better accommodate a more diverse range of

skin colors.[8] Crayola, meanwhile, has launched a 24-shade range of skin tone coloring crayons.[9]

CPG leaders can also take inspiration from a number of other initiatives that have already come to market.

Online retailer Zappos' Adaptive range allows consumers to buy only one shoe or two shoes in different sizes and widths to create a pair through partnerships with shoe brands including UGG and RSVP.[10] Gillette, meanwhile, recently introduced a new razor designed to help caregivers safely groom their loved ones and patients.[11]

In contrast, others have developed new ideas that make pre-existing products more adaptive.

Logitech's Adaptive Gaming Kit is a customizable collection of buttons and switches designed with occupational therapists to plug into the Xbox Adaptive Controllable to meet any user's needs.[12] IKEA's ThisAbles project makes its products more usable by people with disabilities.[13]

Consumer goods companies will need to carefully evaluate which aspects of their products could be adapted, enhanced or spun into new products in order to

be more inclusive, then match this to their local market need to understand the opportunity. Continue to ask what consumers want, then consider what they are willing to pay for and if such an offering fits into a profitable portfolio.

2. Packaging design

Product packaging and the experience around it is core to value creation and needs to be designed to be inclusive. For CPG brands, this is likely to mean redesigning packaging to ensure old stereotypes are avoided and accessibility is a main design pillar.

The packaging of products by 'good beauty' brand The Ordinary[14] and skincare brands Aesop[15] and Ursa Major[16] are great examples of unisex, gender-neutral packaging – a growing trend in the beauty sector.[17]

Significant opportunity – and creative potential – also lies in designing packaging to meet accessibility needs for users with visual, physical or cognitive impairments.

Kellogg's, in partnership with the UK's Royal National Institute for the Blind, developed Coco Pops boxes designed for the partially sighted and blind, featuring technology that allows a smartphone to detect a unique on-pack code, playback labelling and allergen information to the user.[18]

GSK's Voltaren, a pain relief gel, comes in a pack with a special easy to open cap designed to be best-in-class inclusive packaging for users suffering joint pain.[19]

"Touch is so important, and it would be really great if more products had tactile differentiators because it would just make life using beauty products so much easier," blind beauty influencer Molly Burke says.[20]

3. Brand repositioning and inclusive marketing

Bold inclusive product design is an important advance but it needs to be accompanied by a more inclusive approach to brand communications.

What brands say, how they say it and the images they choose to use in their marketing can all have an impact on the experience and whether a consumer feels included or excluded.

One powerful demonstration of this was Unilever's recent announcement that it would eliminate the word 'normal' from all of its beauty and personal care brands' advertising and packaging.[21] The move followed a pledge by the company just a few months earlier to stop using the terms 'fair/fairness', 'white/whitening' and 'light/lightening'.[22]

CPG brands will also have to pay closer attention to where they stand on social issues and be open to take bold actions against exclusion and prejudice. Such actions must be carefully considered and cannot be empty marketing stunts.

Brand actions against exclusion and prejudice that are credible and authentic are meaningful and add value – such as when a company does something that involves giving back to a particular community. To find meaning, companies need to listen to what consumers are saying more often and learn how to connect with them.

Once a brand owner knows its consumers better, there is also an opportunity to offer segmented communication tailored to specific consumer groups. Recently, ecommerce company Zalando's 'Here To Stay' campaign celebrated those who stay true to their beliefs and take a stand for lasting progress.[23] Its aim was to foster dialogue on core values such as I&D and women's empowerment.

Dove[24] and Nike[25] are other examples of brands who have addressed exclusion and prejudice in their campaigns in a smart way.

What CPG
leaders can do next

1. Adopt an applied empathy approach

Invest in new and different ways of thinking. An 'applied empathy' approach is one that starts with understanding everyone who is going to be interacting with whatever you are creating then takes that understanding and applies it to every aspect of what you do.

Cognitive, demographic and experiential diversity can bring new perspectives to your business. Reach out to design teams and search for new lenses. Forget what you think you know about your consumer and learn from underserved markets of consumers.

Listen, more than anything. Hire for diversity. And make sure voices are heard equally throughout the design process. Make sure to have all the difficult conversations that had been hiding under the mat.

2. Do an I&D experience audit

Interrogate your current portfolio and how you go to market, to find any blind spots.

Search for barriers and points of exclusion in your consumer journey and get rid of biased communication and offerings. Assess your digital and customer support channels looking for accessibility gaps. If they are not accessible, make sure they are accessible from now on.

Carve new opportunity areas and plan to build new products with Design For Belonging in mind.

3. Define bold metrics

Define criteria and measure the work around inclusive product design.

Go one step further from your current KPIs and NPS statistics and start paying attention to Experience Indicators. Instead of simply measuring sales numbers, why not measure inclusion points in your consumer journey?

Experience Reimagination
**CPG - Track, trace, trust:
The future is transparent**

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Track, trace, trust:
The future is transparent

As people pay closer attention to the impact of what they buy on communities, society and the environment, transparency has become a critical differentiator. The time has come for consumer goods businesses to fix broken traceability systems and create consumer experiences around provenance that add meaning, inform purchase decision-making and deepen consumer relationships.

What's going on

Now is a time of conscious consumption in which consumer goods brands are under unprecedented pressure to be transparent about their behavior – anything from how they handle personal data to how their suppliers treat their local workers.

Consumers want to consume more consciously, basing purchasing decisions on sustainable and ethical considerations. To do this, they need to know more about what they purchase. They are demanding to see the origin, ingredients and manufacturing of the products they buy. And they want to know about the behavior of the companies behind those purchases to be sure that the choices they make are right.

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In 2020, consumers' behavior evolved dramatically. Accenture research found that amid the pandemic, 61% of consumers are making more environmentally friendly, sustainable or ethical purchases, and nine in ten of that percentage are saying they are likely to continue to do so.[1]

The shift to conscious consumption has forced consumer goods (CPG) brands to think more carefully about their choices and to be transparent at every point in a product's lifecycle. Those that do this well build a stronger reputation and gain respect.

If the planet's resources and endangered species are to be protected, and corruption and irregular practices tackled, traceability is a must. And this applies not just to the food industry but across every type of CPG business – from beauty to household cleaning.

The good news for conscious consumers is that a variety of traceability apps are now available for mobile phones. With a quick QR scan, a shopper can check a product's ingredients, origin, caloric intake and toxicity levels in the shopping aisle. Yuka is a great example that deciphers food labels, translating them simply so a

shopper standing in a food aisle can see just how healthy the product they are about to put into their basket really is.[2]

Blockchain technology is being used by some organizations to make a product's origin more visible. In fishing, for example, it is being used to track and trace across the seafood supply chain – ensuring greater visibility of product movement to help guard against over-fishing, which threatens a number of species.[3] But is blockchain a sustainable solution in itself?

The fashion industry is also embracing traceability to meet consumers' demands to understand the impact that their clothes have on the people who make them and the planet.

Good On You, for example, is a free app that helps people make better fashion purchasing decisions.[4] Covering more than 2,000 brands, it allows users to see a product's rating out of five as well as a summary of how ethical the company behind it is. Its rankings are based on brands' own reported data to information from certification schemes and investigations by NGOs and Greenpeace.

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Yet despite all this, the growing number of CPG traceability systems, schemes and apps have a downside for conscious consumers.

The current traceability experience is fragmented and inconsistent. Users often feel brands are overloading them with data they do not need. Few brand owners have cracked the challenge of displaying the most relevant data in a way that is both understandable and actionable. Meanwhile, many the appeal of those brands that do offer sustainable, ethical or healthier products is obscured by a lack of a universal set of standards and inconsistent design language and consumer experience.

In short, CPG traceability systems are broken.

What's next

Consumers increasingly turning to brands to take into consideration health and safety, honesty, relationships and "doing good" will further build pressure on CPG brand owners to fix broken traceability systems, creating a powerful opportunity for CPG brands to build trust.

Companies will need to unify platforms, systems and languages around sustainability, provenance and design for the full product lifecycle. Doing this will create exceptional opportunities. Innovative solutions and models will create new experiences around provenance that add meaning and deepen consumer relationships.

Improved traceability will help consumers identify the authenticity of products – a need Amazon recently met with the launch of Amazon Transparency to help protect brands and shoppers from counterfeit scams.[5]

CPG businesses best positioned will be those that translate data into content and insights that actually speak to consumers in a language they understand, helping them to make more informed decisions and gain greater control over what they are buying. Companies like CadDo are already helping businesses by providing data-driven insights to help with their environmental and social challenges.[6]

More intuitive user interfaces for platforms and solutions could allow consumers to adjust the type and volume of data they want so it is neither too much nor too little for their needs. This would also pave the way for greater personalization of traceability to what each individual needs to do "the right thing".

The lesson from all of this for CPG brands is the potential to take traceability into other spaces. By tracing the whole of a brand's service ecosystem – its connections, players, partners – and ultimately putting those experiences as part of the transparency, trust and purpose trilogy, a consumer's experience of a brand's services can be enhanced.

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Opportunities for reimagination

1. Earning consumers' confidence

All brands need to build consumers' trust – even more so at a time when the pandemic has had a significant, adverse impact on consumer confidence.

Transparency and traceability are essential trust-building tools. And as governments around the world suffered the greatest loss of trust, businesses became the only trusted institutions.[7] Even so, no organization can afford to take trust for granted.

To date, traceability efforts have been supply chain-focused, enhancing logistics and productivity. Efforts have also included creating visibility around products' provenance to address concerns about sustainability, fair trade or working practices. Good On You, for example, enables people to make fashion choices that align with their values.[8]

Traceability efforts are now extending to other areas, especially within the luxury and beauty industries.

The $24 billion luxury secondhand market, which is growing as 12% annually – four times faster than the primary luxury market – is a huge opportunity for traceability to build trust.[9] In 2020 alone, annual worldwide sales losses from counterfeit clothing cost the fashion industry an estimated EUROS 26.3 billon.[10] Luxury fashion giant LVMH's blockchain-powered AURA project is aimed at countering counterfeiting by ensuring fashion and luxury goods' authenticity at scale.[11]

Now is the time to externalize traceability by focusing more closely on the end consumer. Done well, this will benefit organizations and consumers.

An essential starting point for any traceability strategy is to take ownership of the whole process – from suppliers to directly employed staff, from raw materials to third-party distributors – and monitor it. The most effective strategies then use traceability as the conductor of brand narrative to enhance consumers' experiences and through them show how a brand's full ecosystem helps makes this world a better place.

However, an important opportunity lies in extending traceability to areas beyond

logistics and productivity, products and ingredients. What if consumers could also trace experiences?

Five years ago, the idea of knowing your virtual coach – who they are, their past experience and personal stories – would have been unthinkable. Yet the rise of brands featuring virtual instructors – each with their own unique style, has changed the narrative. Showing us the story behind the virtual coach has enhanced the way we do fitness.

Trust, once earned, provides a powerful platform on which to create new experiences which, in turn, can be used to build trust further. Together, trust and new experiences strengthen brand loyalty among existing consumers and attract new consumers, too.

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2. Sustainability as a vital sign

Not every consumer has the same sense of responsibility – or knowledge – when purchasing products. By positioning sustainability as something that sets an individual apart, there is an opportunity for brands to motivate sustainable consumption behaviors.

Already, not being sustainable is out of style. Soon, it will become unforgiveable. Consider how your brand might make it easier for consumers to feel like their purchases make a difference. What if you could show how much carbon footprint your consumers are saving while consuming your products? Initiatives like DoConomy are paving the way for us consumers to understand how each of our payments make an impact.[12]

In the mid-term, sustainability could become a sign of status. For certain demographics, it can expand from a being a statement to strengthening the desirability of an item – as it has for adidas by Stella McCartney, a unique and innovative fashion and sportswear partnership with products that are ethical and sustainable as well as stylish and functional.[13]

And there's significant growth in sustainable goods. Some 50% of US consumer packaged goods growth came from sustainability-marketed goods – a rate 5.6x faster than conventional counterparts, Harvard Business Review reported.[14] Eventually, sustainability will become a vital sign – both an indicator of a brand's essential functions and a sign to conscious consumers that it is an appropriate brand for them to buy.

3. The power of personality

Once traceability is embedded in everything a brand does, opportunity lies in optimizing brand positioning and communications accordingly. Though important, this doesn't just mean making brand language and storytelling clearer. Brands should adopt a bold positioning to push the agenda even further by challenging their competitors – their entire industry, even – to be more transparent.

Already, some companies make transparency their brand purpose, then make that the core of their story.

Patagonia, for example, strives to establish traceability of the materials it uses in its products by mapping out all the entities in its supply chain, embrace transparency as their purpose and adopt traceability as a way to show it.[15]

Newer brands such as French footwear and accessories brand Veja are also popular as they push transparency, fair trade, equal wages and even zero advertising.[16]

Companies like these effectively harness the power of personality and empower their narrative by tracking what, who, where and why. They bring to life their products, services and, ultimately, their consumer's experiences with their unique stories.

By allowing their consumers to be in charge – for example, by letting them choose what they see – they make them part of the experience.

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What CPG leaders can do next

1. End-to-end transparency: It's everyone's business

Getting your own house in order is an important first step, but it's just the beginning. True progress will come from true collaboration – for example, sharing lessons learned and agreeing common practices – between organizations.

Dismantle practical barriers that can prevent this – such as inefficient processes, misaligned communications and opaque language. Develop new frameworks, value propositions and KPIs to realign sustainability and profitability.

The Roundtable on Sustainable Palm Oil with its 4,000 members working to make sustainability the norm demonstrates what can be achieved when collaborative spirit replaces the knee-jerk self-protective desire to hold back information and close ranks.[17]

2. Recalibrate value

Respect all stakeholders — including consumers, customers, employees, suppliers, communities and shareholders — throughout and consider how best to ensure that value is created for all.

Put sustainability goals on a par with shareholder value. Use transparency benchmarks as a key investor metric. To avoid environmental and social governance-related risks, investors are looking for evidence that a company is effectively identifying risks in its own operations and bringing solutions to the table.

Extending transparency beyond production and products – to also include traceable services around a consumer's purchases and related brand experiences, for example – builds both credibility and impact. A holistic approach will help make transparency systemic and value visible to all.

3. Be human-centric, act human-first

Apply service design methodologies and processes to understand what consumers are looking for, what your brand can offer them and the narrative you need to bring. Don't start from the assumption that all you need to help your consumers is another platform.

Once all those points are aligned, then assess what is the best technology to deliver the service.

Remember, traceability is an opportunity for CPG brands to get closer to consumers' ethical decision-making and, by demonstrating transparency, build trust. Tomorrow's winners will be those that push traceability furthest and use it to enhance their brand experiences.

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