



Health and wellbeing evolution

Paula Donoghue - January 2017

Recap on the critical, global forces of change...



Mass scale
urbanisation



Surge of younger
population in
emerging markets



More working women



Greater global
connectivity and
mobile penetration



Growth of older
population in
developed
markets



Rise of lifestyle
diseases



Growing middle
classes



Smaller
household sizes
and changing
family structures

We will see...:

Today's global population of 7.5 billion is projected to hit 9.7 billion by 2050, with most of the growth coming from developing markets

POPULATION GROWTH

Ireland will grow 1.3%, and the **United Kingdom** 2.4% to 2020

Half of global population growth to 2020 will occur in just **9 countries**

By 2100, over **80%** of the world will live in **Africa** and **Asia**

The world is ageing, but we need to understand and address the demands of the older generation as they increasingly embrace an extended middle age

OLDER POPULATION

In **Japan** 8% of the population is **aged 80+**, compared with the 2% global average

The global median age is 29.6 years, expected to **rise to 30.8 years** by 2020

China has the largest number of people aged 60+ at 211.9 million – by 2035 the number will exceed the total population of the UK and US combined



Spending power will grow amongst the middle classes in most markets, leading to greater levels of consumption than ever before

GROWTH IN WEALTH

US consumer spending recorded its **biggest increase in 6 years** in late 2016

The average **UK** household's disposable income rose ~£600 in 2015-2016

The **Chinese middle class** will account for **30%** of all urban households by 2020 – up from 17% in 2016, and 7% in 2010



Family structures are changing across the world as more women enter the workforce and households shrink or enlarge

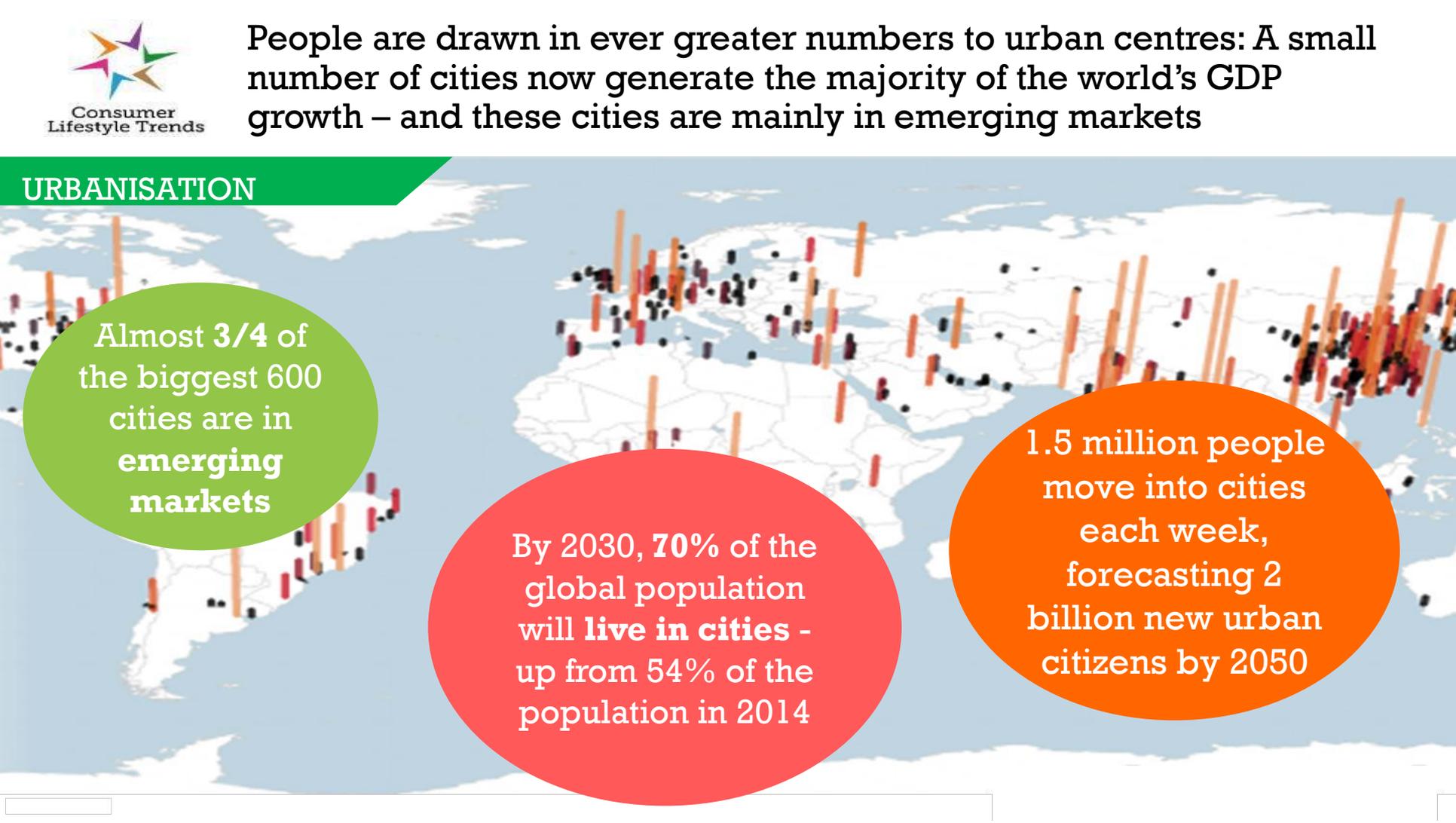
CHANGING FAMILIES

Estimates predict that by 2025 **2.2mn people** in the UK could be living in **multi-family households** – an increase from 1.5mn today

Over the next two decades an estimated further 1 billion women will enter the global workforce

People are drawn in ever greater numbers to urban centres: A small number of cities now generate the majority of the world's GDP growth – and these cities are mainly in emerging markets

URBANISATION



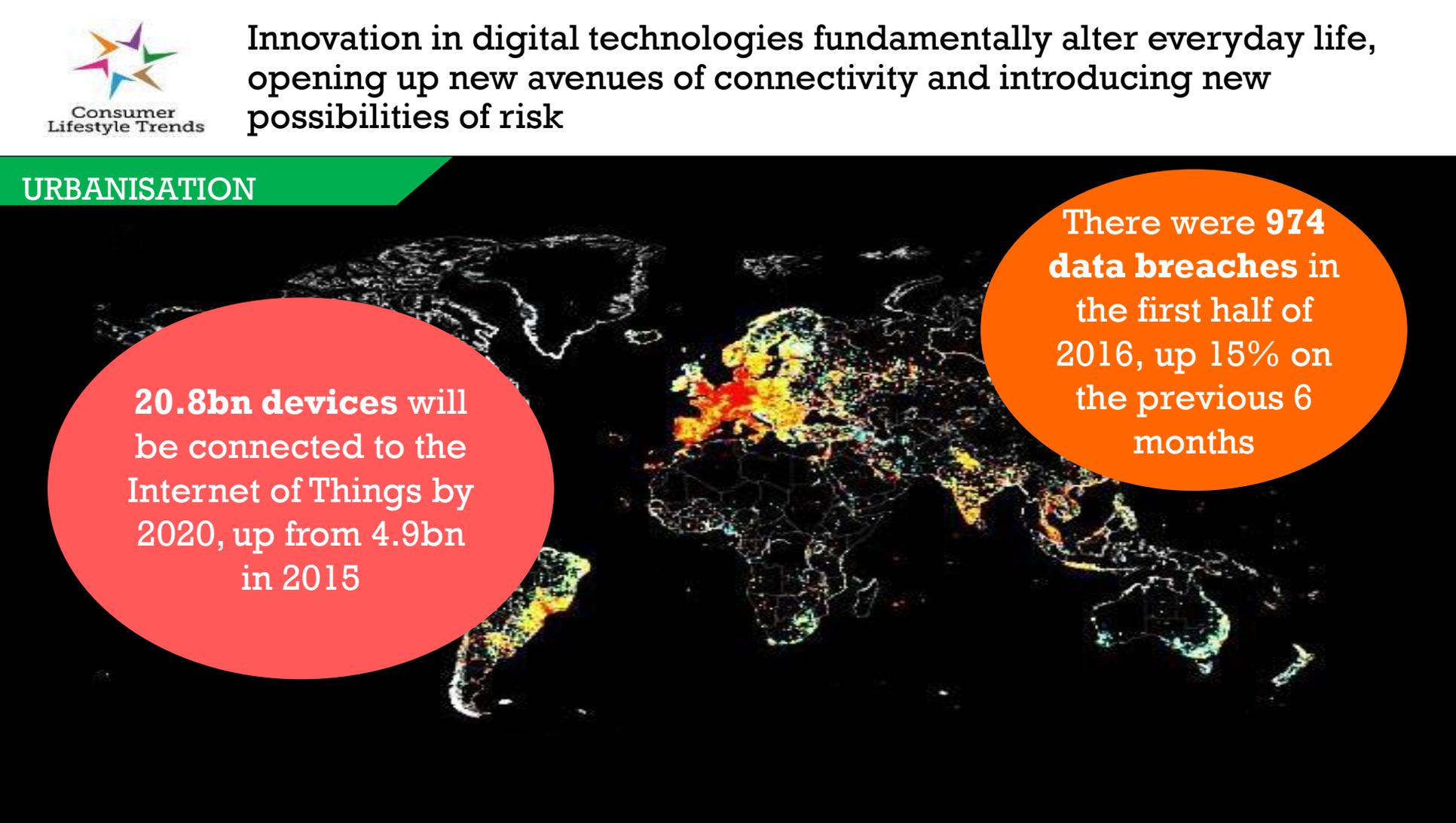
Almost 3/4 of the biggest 600 cities are in **emerging markets**

By 2030, **70%** of the global population will **live in cities** - up from 54% of the population in 2014

1.5 million people move into cities each week, forecasting 2 billion new urban citizens by 2050

Innovation in digital technologies fundamentally alter everyday life, opening up new avenues of connectivity and introducing new possibilities of risk

URBANISATION



20.8bn devices will be connected to the Internet of Things by 2020, up from 4.9bn in 2015

There were **974 data breaches** in the first half of 2016, up 15% on the previous 6 months

Despite changes in legislation and an increase in cooperation by corporations, deadly lifestyle diseases continue to rise around the world

LIFESTYLE DISEASES

Worldwide, tobacco causes almost 6 million deaths a year – both from active use and passive inhalation

The global incidence of diabetes is expected to more than double between 2000 and 2030, with much of the growth in **emerging markets**

How did we get here?

the drinks business



Passport

KANTAR FUTURES

MarketWatch

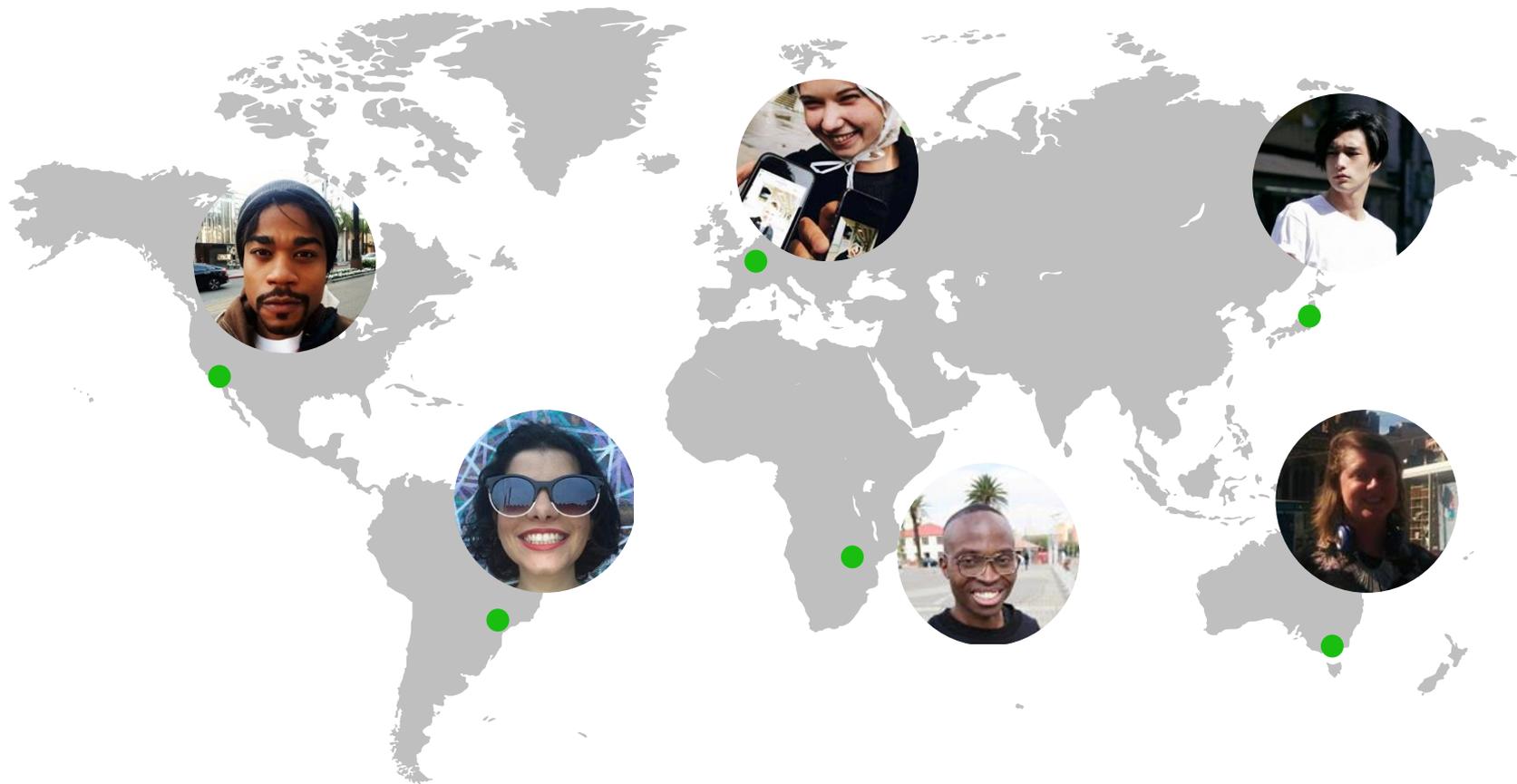
**The
Grocer**



EUROMONITOR
INTERNATIONAL

MONITOR  DOWNLOAD

How did we get here?





Consumer
Lifestyle Trends

Health & wellbeing



“I want to achieve a holistic approach to physical health and emotional wellbeing”







Consumer
Lifestyle Trends

Overview of Health & wellbeing sub-trends



Proactive prevention

Essential purity

Pursuit of happiness *(Creating headspace)*

Strength in numbers *(Tribal wellbeing)*

Seamlessly in tune *(Managing the tempo)*

Personal solutions

Good start





With this in mind we see **three shifts in the sub-trends:**





Consumer
Lifestyle Trends

Which have the greatest momentum?



Heating up
Still warm
Cooling



Seamlessly in tune

Pursuit of happiness

Strength in numbers

Heating up
Still warm
Cooling



Proactive prevention

Personal solutions

Good start

Essential purity



Key takeaways

Consumer Lifestyle Trends



PURE & NATURAL PRODUCTS AND PROCESSES WIN



CASHEWS
PER 1/4 CUP

314
CALORIES
25G
FAT
17.1G
CARBS
10.3G
PROTEIN



AVOCADO
PER 3/4 AVOCADO

241

KNOWLEDGE IS POWER FOR CONSUMERS



HEALTHY LIVING = ENJOYMENT AND SOPHISTICATION



Proactive prevention

Proactively defending the body
against future disease and illness



How is 'Proactive prevention' evolving?

Consumer
Lifestyle Trends



How it was



A desire for routine and targeted solutions, with tangible benefits

How it is



More sophisticated and personalised health measures that are woven into exciting products and services

How it will be



Technology being used to enhance the goodness of nature and boost the defences of the body



'Proactive prevention' in action



NEW 2017



KeVita flavoured, sparkling probiotic drink



USA

NEW 2017



Organic Burst Baobab Joy prebiotic supplement powder



South Africa

NEW 2017



Reliefband Neurowave biotech-powered sickness prevention

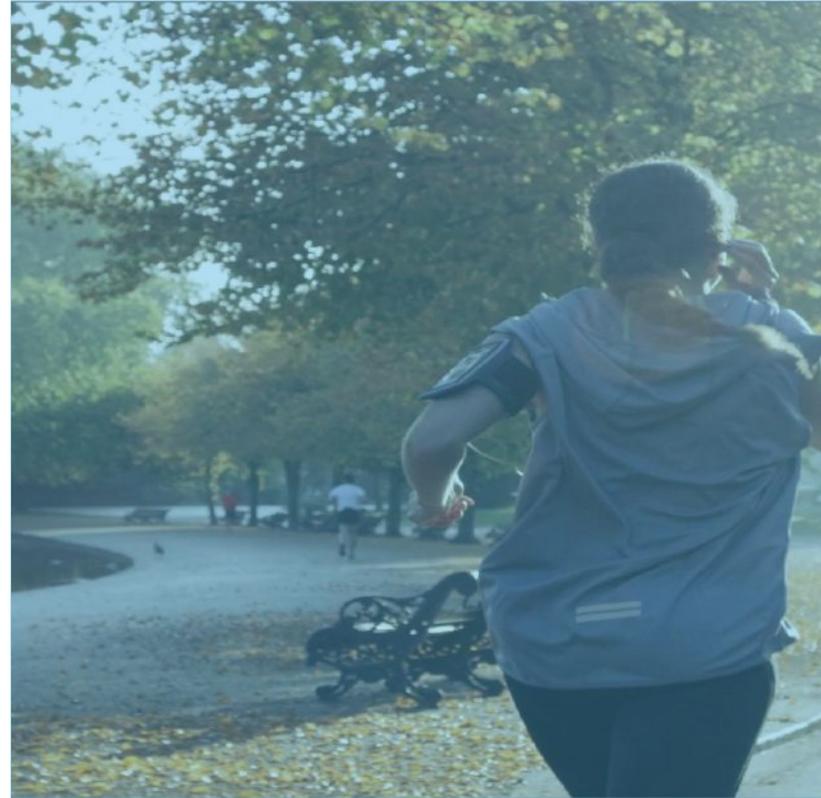


USA



Essential purity

Desire for raw, natural and clean





How it was



Harnessing the health benefits of specific natural ingredients, and prioritising lower processing

How it is



A more holistic understanding of the benefits of simple food preparation processes and components

How it will be



Greater desire to incorporate stripped back eating into everyday diets (e.g. part-time vegans or flexitarians)



'Essential purity' in action



NEW 2017



JuicePress 1-5 day 'Eat Clean' exciting plan



USA

NEW 2017



Gloops innovation to meet Brazilian government guidelines



Brazil

NEW 2017



Purple Carrot vegan and organic delivery service



USA



Pursuit of happiness

Healthy choices are seen as an
enjoyable and effective way to
nourish your mind, body and soul.

(Formerly CREATING HEADSPACE)





How it was



Sophisticated solutions that meet different moods or emotional states at different times, and help achieve balance

How it is



Helping consumers find and experience mental downtime

How it will be



Healthy choices are about adventure, choice and freedom



'Pursuit of happiness' in action



NEW 2017



Parusha's Plant Based Paradise vegan pop-up events



South Africa

NEW 2017



The Robin Collective health food tricks and treats



United Kingdom

NEW 2017



EatChaCha "feeding a positive attitude" with different menus daily



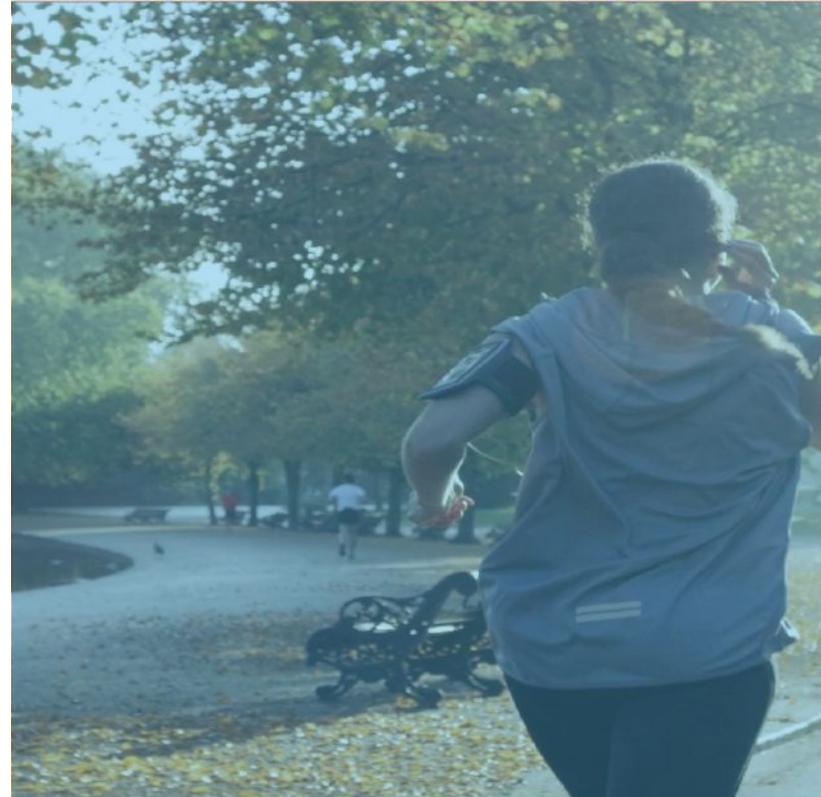
Switzerland



Strength in numbers

Focused training and protein rich diets are gaining mass appeal and status, forging new fitness communities

(Formerly TRIBAL WELLBEING)



How is 'Strength in numbers' evolving?



How it was



Individual motivation to reach personal health goals, even if part of a group

How it is



Collective health-focused endeavours that give a greater sense of purpose

How it will be



A network of physically, digitally connected individuals with shared goals and ambitions, healthy living at the centre



Consumer Lifestyle Trends

'Strength in numbers' in action



NEW 2017



Purpose.com Foodstand social health app



Australia

NEW 2017



Kayla Itsines building global health & fitness communities



USA

NEW 2017



Reebok Spartan Team Challenges



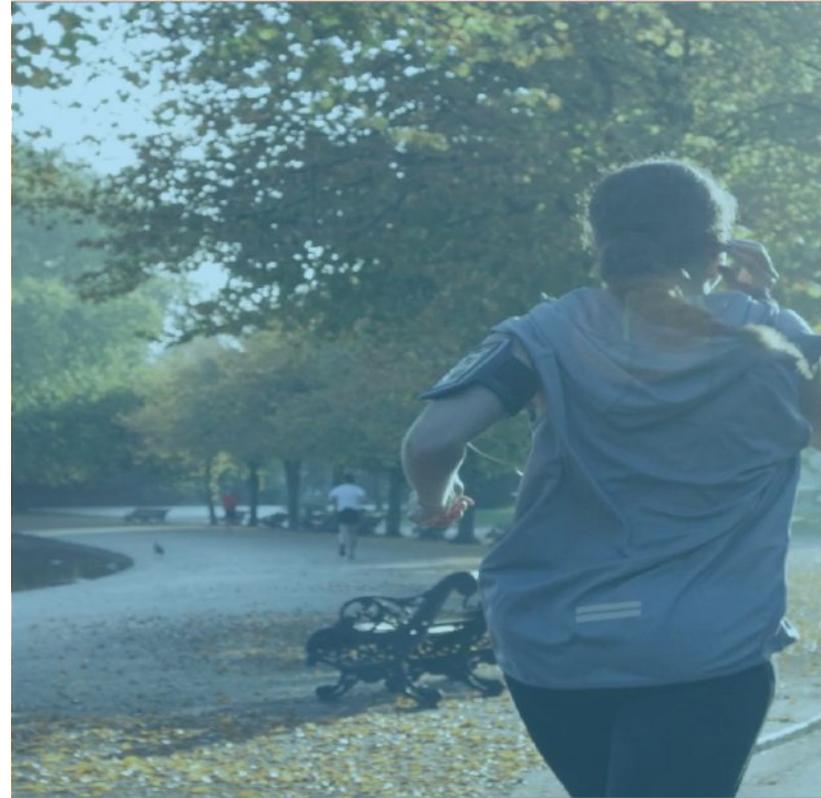
United Kingdom



Seamlessly in tune

Tuning into the long- and short-term cycles of your body and mind

(Formerly MANAGING THE TEMPO)





How it was



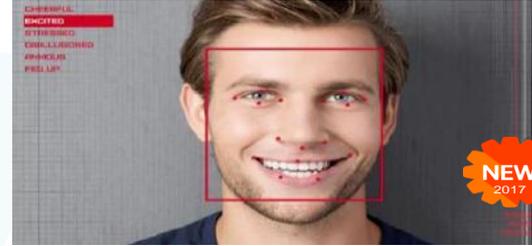
Energy solutions that feel natural, not synthetic

How it is



Sophisticated and exciting energy management through understanding food and drink combinations

How it will be



Real-time reactive products that work your body needs at specific times of the day, year and in certain situations



NEW 2017



B.eat time-tailored snacking in Brazil



Brazil

NEW 2017



Sleep Number 360 personalised mattress-tech for optimal sleep



USA

NEW 2017



Fabulous award-winning healthy habit builder

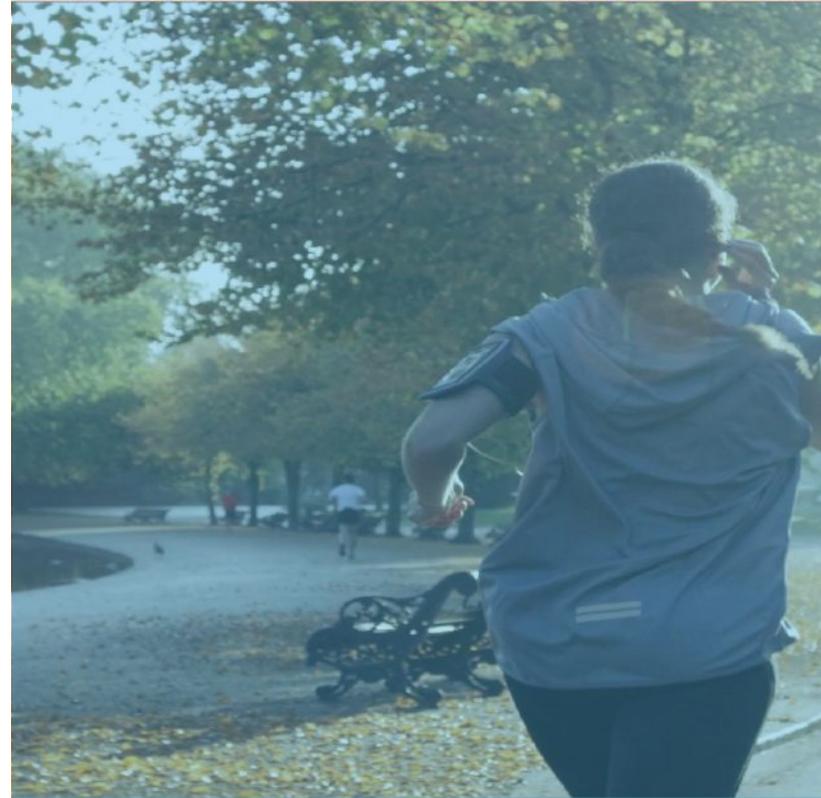


USA



Personal solutions

Desire for personalised health solutions & measurement tools (tech-enabled or otherwise)



How it was



Personalised diets based on allergies and intolerances

How it is



Holistic, personalised and often tech-enabled plans

How it will be



Solutions that are tied to the unique DNA of your body



'Personal solutions' in action



NEW
2017



Jawbone and Munchery
tracking your take-away
nutritional information



USA

NEW
2017

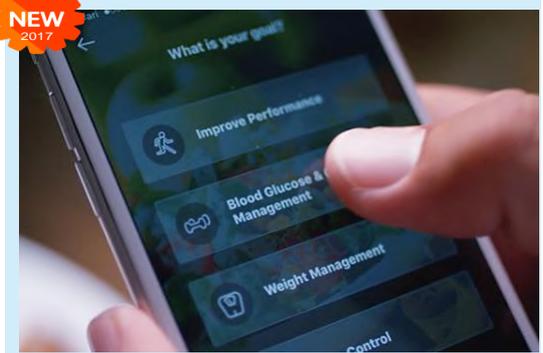


Tossed digital salad
customisation



United
Kingdom

NEW
2017



Smartplate Topview
personal health suggestions
thanks to Artificial
Intelligence

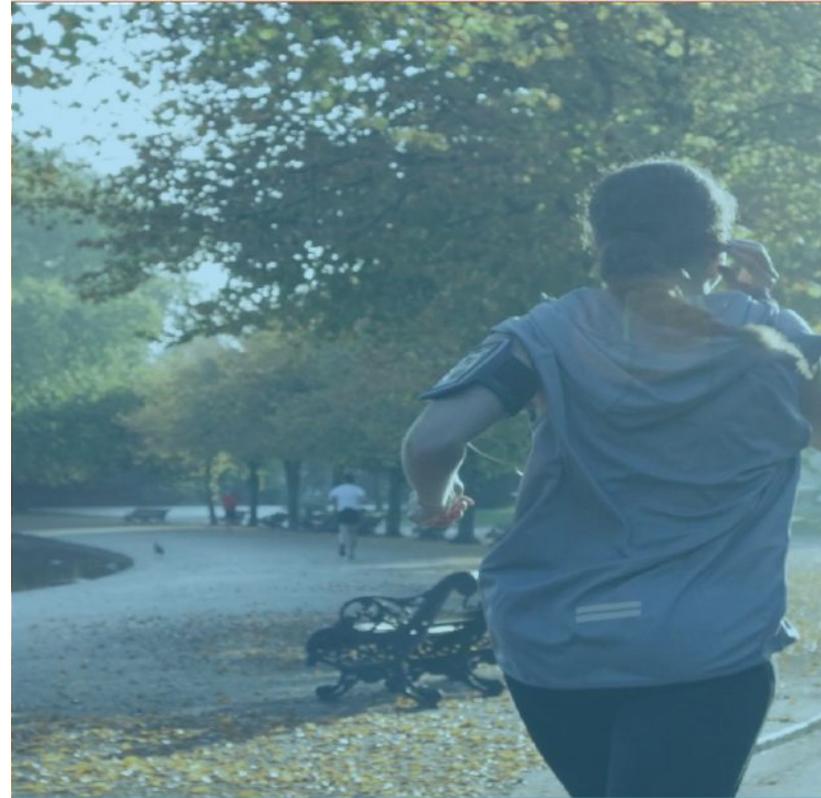


USA



Good start

Ensuring children get the best start
in life





How it was



Introducing kids to more sophisticated tastes and food education from a young age

How it is



Simple ways (often tech-enabled) to get kids involved in sourcing healthy food and cooking

How it will be



Digital, integrated platforms for involving tech-savvy children in food preparation - to develop healthy relationships with food



'Good start' in action



Consumer Lifestyle Trends

NEW 2017



Adachi Ward schools pioneering Japan's dietary education programme



Japan

NEW 2017



Rainbow Plate discovering healthy eating through art and play



USA

NEW 2017



Bub's superbaby range harnessing ancient grain goodness



Australia



Overview of sub-trends



Proactive prevention

Essential purity

Pursuit of happiness (*Creating headspace*)

Strength in numbers (*Tribal wellbeing*)

Seamlessly in tune (*Managing the tempo*)

Personal solutions

Good start



Next level

Leverage technology to help consumers make the most of your product, and understand its health and energy benefits?



Work with digital partners to tailor your products to the specific needs of individuals?

Next level

Pare back ingredients, processes or packaging to emphasise the naturalness of your product?



Ensure that natural still communicates and delivers full flavour and experience?



Next level

Make your product customisable, and suitable for a variety of diets and lifestyles? How can it contribute to a holistically balanced lifestyle?



Act more like a lifestyle brand - build on consumers 'showing off' about Health & Wellbeing?



Consumer Lifestyle Trends

Our Trends calendar for 2017



JAN



Health and wellbeing



FEB



Responsible living



MAR



Responsible living



APR



Busy lives



MAY



Busy lives



JUN



Keeping it real



JUL



Keeping it real



AUG

Summer break



SEPT



Personal value seekers



OCT



Personal value seekers



NOV



Shared experiences



DEC



Shared experiences



Health and wellbeing evolution

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