

A photograph of a city square at sunset. The sun is low on the horizon, creating a strong golden glow and long shadows. In the foreground, several people are silhouetted against the bright light, walking across a checkered tile plaza. A tall, ornate street lamp stands on the left. In the background, there are palm trees and buildings. The overall mood is warm and urban.

Taking the Consumer Lifestyle Trends into 2018 and beyond

KANTAR CONSULTING

The Consumer Lifestyle Trends represent the biggest trends shaping people's lives over the next 3-5 years. By keeping up with trends and understanding what's coming next, the programme helps companies within the food & drink industry in Ireland to better prepare for the future needs and desires of their consumers.



ENGAGING
Experiences

Consumers want moments of discovery and delight that enhance their day, sharing exciting stories and spaces with others.

HEALTH &
Wellbeing

Consumers want to eat, drink and live to optimise their body's systems, to feel better than well today and tomorrow.

Fuller
LIVES

Consumers want to use their time to be as productive and sociable as possible, flowing from one thing to the next - and want to be helped, not hindered, by tech.

Responsible
LIVING

Consumers want to have a positive impact on society and the environment, and take pride in a sustainable way of living.

COMMUNITY &
Identity

Consumers want to express the views and values of themselves and their community, and have their uniqueness and creativity respected and celebrated.



I want moments of discovery and delight that enhance my day, sharing exciting stories and spaces with others...

Value-creation networks

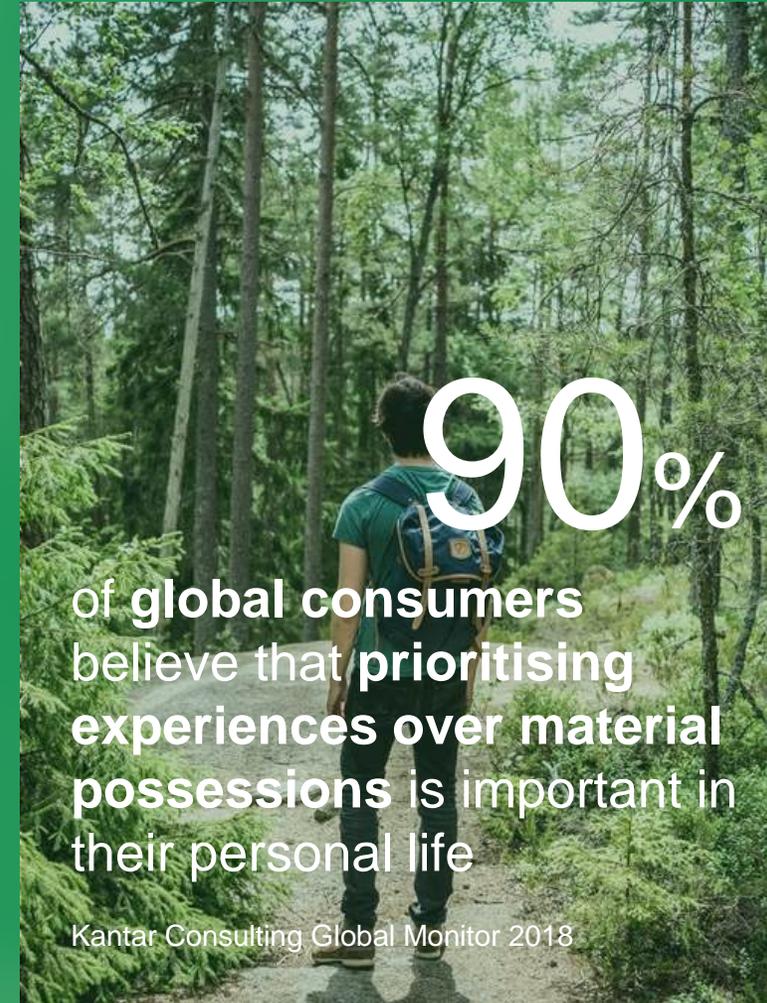
product journeys and stories AR and VR
New space **rise of the** enhancement

design **storyteller culture**

digital & physical experience design

experiences merge peer-to-peer sharing
and exchange

Rise of service,
experience and time
exchanges **trusted reviewer networks**



90%

of global consumers believe that **prioritising experiences over material possessions** is important in their personal life

Kantar Consulting Global Monitor 2018

WHAT'S DRIVING THE TREND?: DRIVERS



Multipolar World

Growing economies and connectivity in certain markets is opening up new worlds of experience and excitement to new markets of consumers



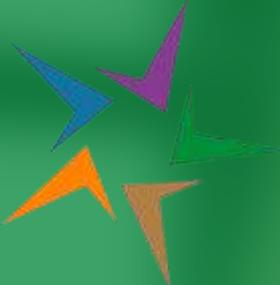
Growing Digital Connectivity

New pools of consumers get connected, Qatar has at least 2.3 million cell phones in a country of around 2 million people where 34% of consumers own a tablet.²



Changing Lifestages & Household Structures

Globally, more Millennials will be pursuing a variety of unique lifestyle paths and are deferring getting married. In China, the average age women are getting married in 2015 was 27, vs 20 in 1950.³



ENGAGING *Experiences*

HOW IS IT MANIFESTING?: SUB-TRENDS

Story Culture

We see a global proliferation of consumers as storytellers and curators of their day-to-day lives, sharing streams of mini moments with their online networks

Sensory Experiences

Advancing technologies enhance and add entertainment to moments of consumption, playing with the senses and perceptions of reality

Peer-to-peer Engagement

Consumers access and exchange all kinds of experiences through platforms that enable peer-to-peer in all realms of their lives

Food Fusions

Intensifying multiculturalism in urban areas is leading to breakthrough culinary hybrids at both high-end and in the mainstream

ENGAGING Experiences

We see a global proliferation of consumers as storytellers and curators of their day-to-day lives, sharing streams of mini moments with their online networks

STORY CULTURE



HOW IS IT MANIFESTING?

Through the eyes of our Streetscapers...



Mexico

"We spend most of our time on social media and this is how we project who we want to be. Social media has gained a whole new role as we record and take pictures of everything so that others can see and aspire to our lives."

Marianna, Mexico



South
Korea

Activities evolving around when and how we share experiences online are widespread. A lot of people go on hot restaurant tours, creating their own version of Michelin guides and posts instagrammable dishes on social networks."

Gageong, South Korea

ENGAGING Experiences

Story Culture



More than 500 million Instagram users open the app every day, and **300 million** of them are watching Stories daily.¹



Virgin Red "Keys to the Kasbah" takes consumer engagement to the next level with set missions and tasks to win prizes.

Virgin invited consumers to undertake "secret agent" missions and complete tasks, capturing efforts via video to win a stay at the Kasbah Hotel. Consumers became characters in the campaign's story, unlocking different rewards by completing tasks and engaging with the brand online. It shows a new type of marketing where consumers no longer accept being talked to but want to take part in an experience & the full story behind a brand they are interacting with.



The Body Shop leveraged the sharing of day-to-day clips using vegan influencers in order to reach their desired audience.

Embedding their skin product in casual story snippets of the lives of influencers revealed the effectiveness and ease of the vegan products – which required no editing to look good.

ENGAGING *Experiences*

Advancing technologies enhance and add entertainment to moments of consumption, playing with the senses and perceptions of reality



SENSORY EXPERIENCES



HOW IS IT MANIFESTING?

Through the eyes of our Streetscapers...



Chile

“There is a huge appetite for experiencing the context and culture of world foods and how that can be brought into the environment it is being consumed in”

Stefano, Chile



USA

“Apps are being developed to let you dine under the sea or at a rural hillside in Italy from home or a budget hotel; sip Californian wine whilst VR takes you to the vineyards it was made in... for tourism this creates a long-lasting experience and encourages people to visit the area.”

Vincent, USA

ENGAGING Experiences

Sensory Experiences



Creating a fully immersive and stimulating experience around the food, Quince in San Francisco serves 'A Dog in Search of Gold'. It consists of chestnut crisps, celeriac, porcini and ricotta truffle, served on an iPad playing a video of a dog searching for truffles.



Whisky River in Black Rock Bar

Guests drink from a "river of whisky" contained in an old oak tree.

The venue adds a different label each week to one of the "rivers", creating an ever-evolving house blend.



Geolocation podcasts, Echoes

Echoes invites everyone from around the world, from global travellers to street artists, to share stories from the communities they live in for anyone to download and listen to whilst immersed in the physical space the podcasts relates to.

ENGAGING *Experiences*

Intensifying multiculturalism in urban areas is leading to breakthrough culinary hybrids at both high-end and in the mainstream



FOOD FUSIONS



HOW IS IT MANIFESTING?

Through the eyes of our Streetscapers...



Chile

“Santiago is shifting into something more alive, challenging and captivating - embracing diversity and becoming a real multicultural city [...] we’re enjoying foreign foods and festivals especially”

Stefano, Chile



USA

“The proximity of diverse foods in the new American pallet has created an appetite for fusions foods. Some blend a new cuisine with something more familiar and others create something more creative and new, like Korean-Mexican tacos trucks.”

Vincent, USA

ENGAGING Experiences

Food Fusions



62% of 18-22 year-olds say they cook international cuisines at home from social media, compared to 46% of Millennials (23-38), and just 23% of Gen X consumers (39-52)

(modernrestaurantmanagement.com, US study, July 2018)



Eastern techniques in Danish cuisine

Michelin-starred chef Jonathan Tam uses bamboo steamers for several of his Restaurant Relae dishes, a clear move away from European techniques of boiling or blanching, and a much more entertaining 'reveal' as part of a dining experience



Street food leads in breakthrough combinations

With vendors like 'Saucy Porka' dishing up Vietnamese-Puerto Rican dishes on the edge of Hyde Park, Chicago



WHAT DOES A SUCCESSFUL BUSINESS LOOK LIKE IN 2025?

IT IS THE PERFECT EXPERIENTIAL SPACE PARTNER

These new social spaces need to be seen as lucrative new channels for food and drink brands.



IT IS AN EXCITING CHARACTER IN A CONSUMER STORY, NOT THE STORY ITSELF

Creating a Story online is not only easy, but effective: one in five Stories generates a direct message from followers.¹



These interactions reach thousands and provide Instant market research and reaction data; the key is creating products that spark imagination for story creation.

IT USES VR/AR TO UNLOCK WORLDS AROUND THE BRAND

From first encounters in retail settings to virtual second life for packaging, and virtual loyalty programs, enabling brands with AR & VR taps into consumer desire for experience.





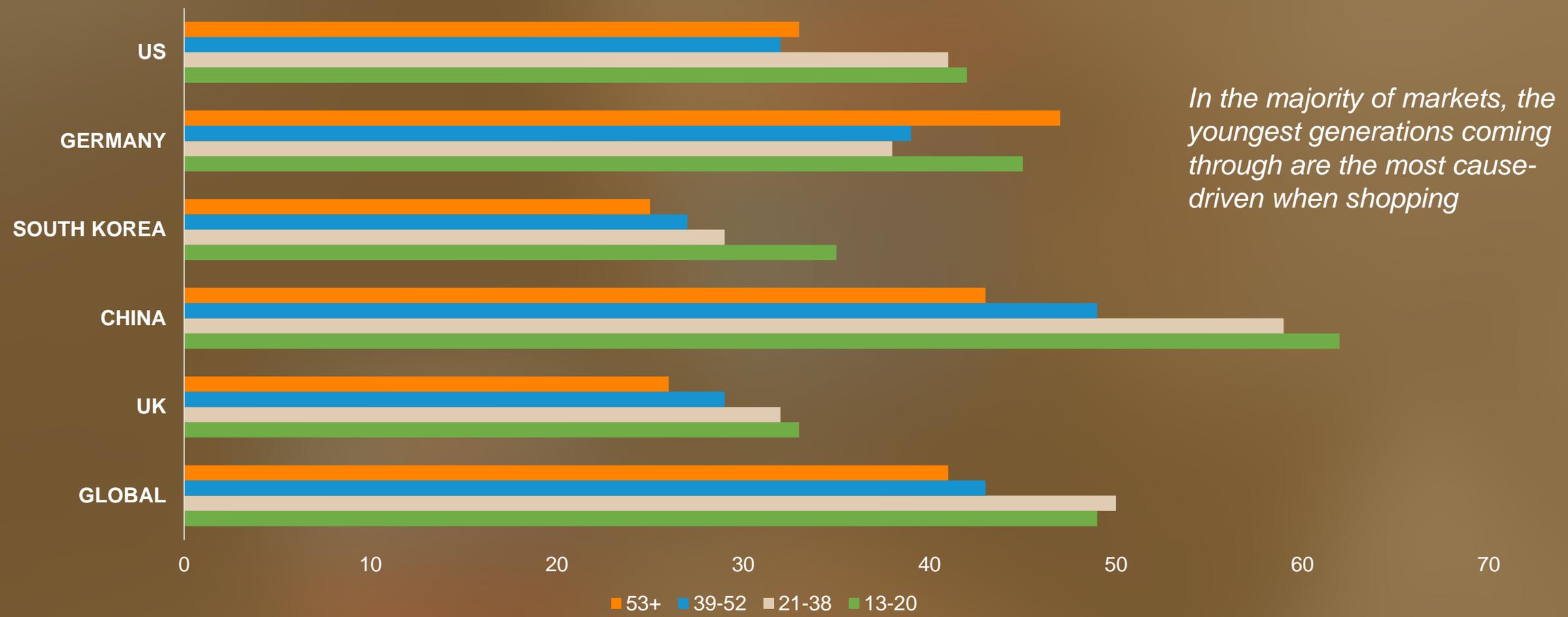
I want to have a positive impact on my society and the environment, and take pride in that sustainable way of living...

awareness of
Eco- planetary limits **Rise of scrutiny**
incubators **blockchain revolution**
intense media resource scarcity **activist**
coverage **local initiative** investment
conscious lifestyle change
in-home contamination scanners **shifting**
rise of innovation for **regulation**
sustainability Sustainable
as premium



Responsible
LIVING

“I make an effort to buy products from companies that support causes I care about”



WHAT'S DRIVING THE TREND?: DRIVERS



Increasing Environmental Pressure

120 million more hectares of natural habitat need to be converted to farmland to meet demand for food by 2050. ¹



Rise of Protectionism and Nationalism

From January 2018 China has banned imports of plastic waste from other countries. ²



Rapid Urbanisation

Cities are responsible for 67% of the total global energy consumption and more than 70% of greenhouse gas emissions



Responsible LIVING

HOW IS IT MANIFESTING?: SUB-TRENDS

Supply Chain Laid Bare

Consumers will expect brands to operate ethically and have a net positive impact within their supply chain. Increasingly powerful and accurate technologies will provide proof of this from independent sources.

Innovating against waste

War on waste takes on new life and meaning as cutting edge innovation helps environmentally friendly alternatives hit the mainstream

Eco-Status

Consumer behaviour is fundamentally reshaped by a new wave of sustainable brands that are premium in look and feel, and are markers of status

Local Action

With global longevity increasing and changing population status quo, consumer and government focus on taking proactive measures to live better, not just longer intensifies

Responsible LIVING

Consumers will expect brands to operate ethically and have a net positive impact within their supply chain. Interest in provenance remains as relevant as ever and is enhanced with powerful and accurate technologies which provide proof from independent sources

SUPPLY CHAIN LAID BARE



Every product has a story

We enable great businesses to build trust in their goods and supply chain. Provenance powered data helps shoppers choose your product.

Enter your email... [JOIN FOR FREE](#)

HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers...



Japan

“ Higher productivity and overwork are the key issues that get media attention, there is no mainstream awareness of the sustainability aspect of manufacturing”.

Patrick, Japan



USA

“Technology is improving our food systems with ingredient tracking techniques like blockchain and innovation to food production”

Vincent USA

Responsible LIVING Supply Chain Laid Bare



Walmart and IBM have partnered to create the **first blockchain tracking system for food** for a major retailer, cutting down the time it took to track produce from six days to two seconds.¹



Tony's Chocolonely, Germany uses bean tracking (blockchain) technology to ensure 100% slavery free chocolate

The first in the snacking space to invent this kind of accreditation



Spinneys Supermarkets in the UAE provides in-store codes to track product journeys

Next-level demands for traceability are evolving globally, not just in the West

Responsible

LIVING

The war on waste takes on new life and meaning as cutting edge innovation helps environmentally friendly alternatives hit the mainstream



INNOVATING AGAINST WASTE



HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers...



Chile

“Plastic bags are a real pain. We are so used to them that sometimes it is ridiculous, it’s like we don’t realize the harm we are doing with this kind of behaviour. The government is working on a decree to ban plastic bags as soon as January 2019.”

Stefano, Chile



USA

“...there is a near futurology that most Americans could see themselves using completely new, sustainable, lab-grown foods and materials in the next few years”.

Vincent, USA

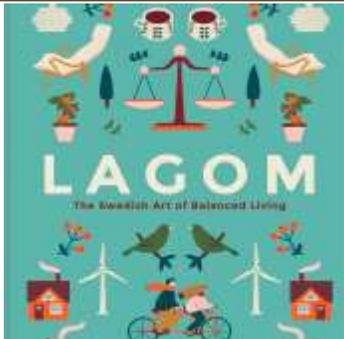
Responsible

LIVING

Innovating Against Waste



KeepCup, the Australian reusable cup brand, sold a **quarter of a million** of their barista-standard cups in the UK in the run up to Christmas - the biggest three months of sales in its history and just before the 25p “latte levy” was imposed.



Using an existing by-product in agriculture - Piñatex is a natural textile made from pineapple leaf

Creating additional income streams for farming communities as well as a sustainably sourced, high-fashion material



Eliminating waste from the consumption cycle - Plastic Eating Enzymes

Scientists in Japan & the UK have created a mutant enzyme that breaks down plastic drinks bottles

Responsible LIVING

Consumer behaviour is fundamentally reshaped by a new wave of sustainable brands that are on-trend and are markers of status

ECO-STATUS



HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers...

"We see that the next generation is more conscious of sustainability, where their food comes from and their carbon footprint and are making everyday choices that have longer-term impact"

Zaina Kanaan, UEA



United Arab Emirates



Denmark

Tackling the next big environmental problem: fast fashion. It is a signal of pride to wear environmentally sustainable clothes brands which are creating limited products following three key principles: quality, sustainability and pride"

Kinvara, Denmark

Responsible

LIVING
Eco-Status



The ethical products and services sector in the UK has grown by more than £40bn since 2008 and is now worth **£81.3bn** (Financial Times, 2017)



Michelin star 'The Perennial' in San Francisco reinvents classic dishes within a zero waste 'loop'

The Perennial grows its veg with restaurant compost and even makes resin and varnish for the interiors from cooking by-products



The Giki Food app is a catalogue of sustainable, premium suppliers with ratings against different values

Consumers can make fully informed decisions on how brands match up in the metrics that matter the most to them



Responsible

LIVING

Consumers continue to find their own community solutions and initiatives, but proactive businesses are becoming part of the local, social fabric too



LOCAL ACTION



HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers...



United Arab Emirates

“Local ethical concerns are still largely unattended, UAE is mostly built on international concepts and franchises and aspirational attitudes, there will be trickle down effect from trends in the west”

Zaina, UAE



USA

In the US Hyperlocal marketing allows brands to communicate to a group of individuals with similar interests in a specific community or neighbourhood. Mondelez’s brand, Ritz Bits, recently sponsored over 1,000 youth soccer teams across the US and built positive relationships with team parents in the process.

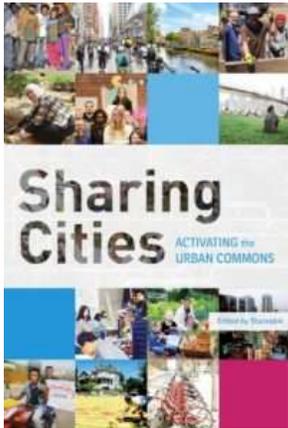
Vincent, USA

Responsible

LIVING
Local Action



47% of 21-38 year olds actively buy from smaller brands as it allows them to support local entrepreneurs (vs 40% of 38-53 year olds)



Unilever is proof that huge multinational businesses can build local economies too

Unilever have committed to donate 50% of the profits from their Growing Roots urban farming initiative



Patagonia Action Works – networking activists and facilitating local action

Patagonia copy media headlines onto the platform, next to a button saying 'What Can I Do?'



WHAT DOES A SUCCESSFUL BUSINESS LOOK LIKE IN 2025?

IT IS NOT AFRAID OF BUILDING LOCAL ENTERPRISE & BRANDS

For the benefit of the economies and lives involved in and impacted by its supply chain, successful businesses will become investors and service partners



IT NUDGES CONSUMERS TOWARDS MORE CONSCIOUS CONSUMPTION

Via setting an example when it comes to transparency, becoming partners with brands with a similar ethos and purpose, and openly supporting public initiatives



IT AVOIDS WASTE AT ALL COSTS, AND LOVES GIVING IT NEW VALUE

With significant investment into innovating alternative packs, or even products that require fewer materials, and sees opportunity in the waste of others





I want to eat, drink and live to optimise my body's systems, to feel better than well today *and* tomorrow...

focus on sleep Self-care &
wellness as status emotional wellbeing
interrelated systems

Awareness of gut and mental performance diets
neural connections **healthy ageing**

Lifestyle navigating health advice

philosophies genetic traits

trackers and sensors

intensifying public health initiatives
Self-diagnosis & empowered consumers



75%

of global consumers say they are likely to buy products or services that will enhance their sense of emotional wellbeing in the next 12 months

WHAT'S DRIVING THE TREND?



**Redefining
of old age**

The perception of 'old age' is changing drastically, driven by longer life expectancy and increasing wealth and health levels of older populations in many markets

The global 85-and-over population is projected to increase by 351% between 2010 and 2050, compared to a 22% increase for the population under the age of 65.



**Growing digital
connectivity**

Constant connectivity has unlocked consumer desire to monitor and track health – and now consumers look for proactive ways to improve their scores and connect different aspects of their lifestyle

35% of global consumers actively “wish there were more technology tools and apps that would manage their life”, up 5% from 2015, while 58% say they are on the internet constantly throughout the day (vs 49% in 2015).



Rise of lifestyle diseases

Across the world, rising prosperity and access to convenient, processed foods are leading to a higher incidence of life-threatening health conditions, such as obesity, diabetes, cancer and heart disease.

Obesity is predicted to become increasingly prevalent, becoming the seventh biggest cause of death globally by 2030, with much of the growth coming from emerging markets.

WHAT'S DRIVING THE TREND?: DRIVERS



Growing digital connectivity

The number of connected wearable devices worldwide is expected to jump from 325 million in 2016 to over 830 million in 2020.¹



Redefining of old age

In the US, over 60s will hold 24% of total income by 2020.²



Rise of lifestyle diseases

One fifth of all adults in the world will be obese by 2025.³

1 in 6 people in the past week experienced a common mental health problem.



HEALTH &

Wellbeing

HOW IS IT MANIFESTING?: SUB-TRENDS

Health as Systems

We increasingly understand our body as interrelated systems, and seek to improve them with diet, from the inside-out, and through external, tech-enabled stimulation.

Expert Enhancement

Democratised information leads to an increase in 'expert' voices when it comes to health. Consumers are reaching for tech-enabled, personalised and verified solutions for enhancing their diet and wellbeing.

Rediscovering Natural

Health-savvy consumers and innovators are discovering and extracting the true wellness benefits of natural ingredients, giving certain products a surge of popularity or a new lease of life.

Engineering Goodness

Increasing consumer expectation for alternatives to products perceived to be unhealthy is driving the growth of solutions reshaping our overall diet.

Optimising Age

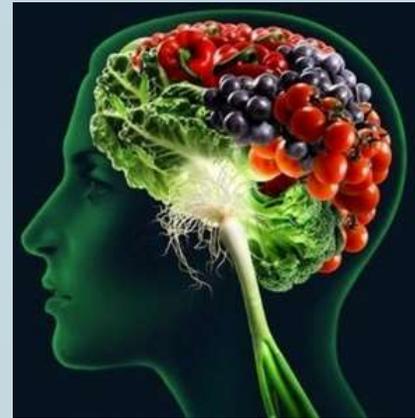
With global longevity increasing and changing population status quo, consumer and government focus on taking proactive measures to live better, not just longer intensifies.

HEALTH &

Wellbeing

We increasingly understand our body as interrelated systems, and seek to improve them with diet, from the inside-out, and through external, tech-enabled stimulation.

HEALTH AS SYSTEMS



HOW IS IT MANIFESTING?

Through the eyes of our Streetscapers...



South Korea

"More and more Koreans are trying to find the balance between work and free-time and to search for the meaning of life."

Gayang, South Korea



Denmark

Healthy good quality food permeates everyday life in Denmark. So much so that the international convenience store 7/11 serves Paleo food that promotes digestive functionality and mental alertness"

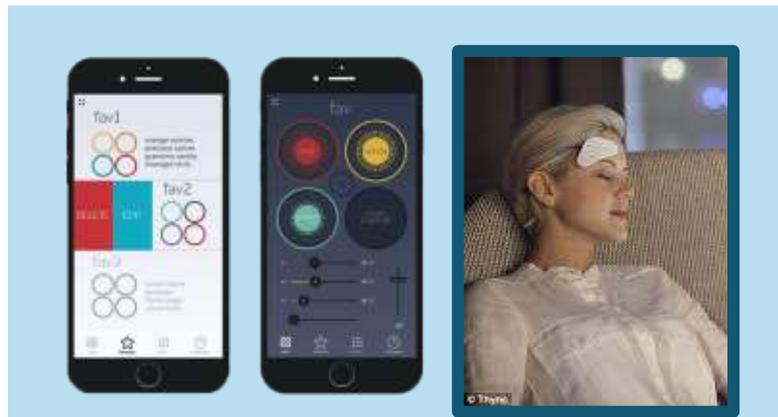
Kinvara, Denmark

HEALTH & Wellbeing

Health as Systems



Only 43% of the cells in the human body are human. The rest is taken up by our microbiome that includes bacteria, fungi, single-celled, archaea and viruses...
2018 study by bioRxiv.org



Apps that facilitate mental health

Moodo – using fragrances to create a stress-free and healthy environment

Thync – non-invasive bioelectronic platform which targets certain nerves for electrical stimulation - used to combat mental health illness and autoimmune disorders



Bio-dynamic ingredients to improve physical and mental wellbeing

High Mood Food –natural, fermented and living food, promoting the link between digestion and mental health

WellWell – organic cold-pressed juice with biodynamic (fermented) lemon, a performance enhancer and counter-fatigue drink

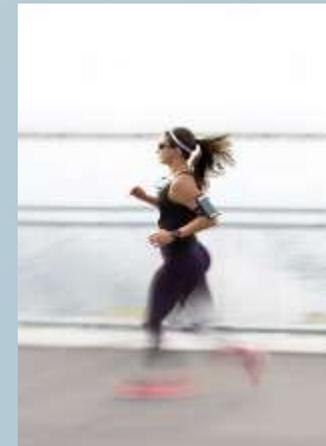
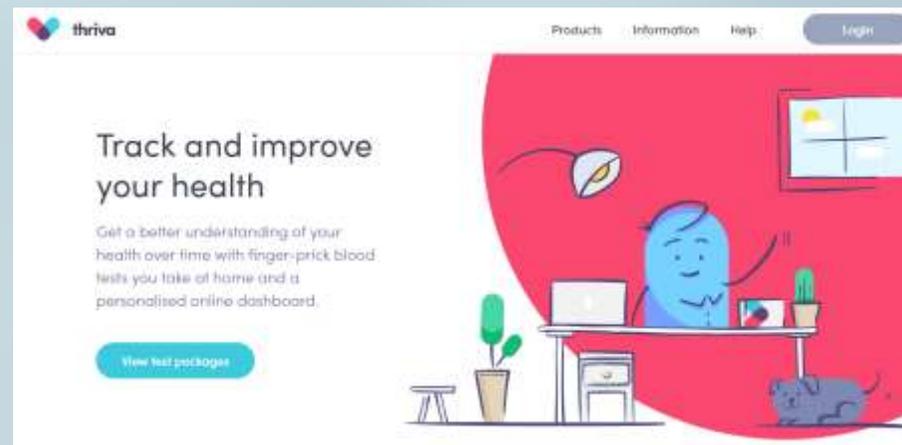
HEALTH &

Wellbeing

Democratised information leads to an increase in 'expert' voices when it comes to health. Consumers are reaching for tech-enabled, personalised and verified solutions for enhancing their diet and wellbeing, and mitigating risk.



EXPERT ENHANCEMENT



HOW IS IT MANIFESTING?

Through the eyes of our Streetscapers...

"Word of mouth and influencer endorsement are the key forms of advertising for wellness brands in Mexico."

Mariana, Mexico



Mexico



Germany

"Consumer choices are made out of practicality and better, tech-enabled insight as they wish to make reasoned and responsible decisions."

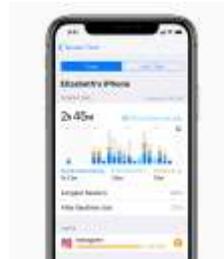
Paul, Germany

HEALTH & Wellbeing

Expert Enhancement



Google and Fitbit are collaborating to merge Fitbit tracking with electronic medical records for a comprehensive data set for patient and clinicians.



iEAT allergen detection system, a portable key ring food scanner and 'allergen alert'

Processes previously restricted to science labs are now mainstreaming for families



Lumo Lift is a corrective wearable which vibrates when you are hunching or can help correct your stride

Lumo Lift aims to reduce visits to medical specialists and physiotherapists

HEALTH &

Wellbeing

Health-savvy consumers and innovators are discovering and extracting the true wellness benefits of natural ingredients, giving certain products a surge of popularity or a new lease of life.

REDISCOVERING NATURAL

HOW IS IT MANIFESTING?

Through the eyes of our Streetscapers...

"It seems our dark Tualang honey is gaining popularity outside of Malaysia – we understand now it is good for amino acids and vitamins, much like other traditional ingredients here."

Lavina, Malaysia



Malaysia



United Kingdom

"We're trying to incorporate berries into everything now we're shown their pigment contains cancer-fighting enzymes."

Lucy, UK



HEALTH & Wellbeing

Rediscovering Natural

The global **Natural Health Extracts** market is set to grow **8% YoY to 2024**

Newfoodmagazine.com, 2017



Major health foods retailer Planet Organic embraces Ayurvedic anti-inflammatory and antioxidants

Traditional Eastern medicinal herb turmeric (and related curcumin) now features in products as diverse as popcorn, to tea and coffee, granola and chocolate



Increasingly popular health influencer profiles highlight the most innovative and beneficial natural extracts

Like @realfoodology, (Courtney Swan) who has gathered 113k followers since she began her online campaign against antibiotics

HEALTH &

Wellbeing

Increasing consumer appetite for alternatives to products perceived to be unhealthy drives growth of solutions reshaping our overall diet

ENGINEERING GOODNESS



HOW IS IT MANIFESTING?

Through the eyes of our Streetscapers...



Japan

“Food and drink in Japan occupies a strange place in 2018. In general, consumers are inclined to eat at cheaper restaurants — McDonald’s has seen a massive sales spike in recent years – although interest in more expensive and novel alternatives is also sky rocketing”

Patrick, Japan



Denmark

“Green restaurants and cafes began opening all over Copenhagen from the end of 2016 and have become hugely popular. ‘Green restaurants and cafes’ count as places that have a strong focus on health-oriented alternatives to traditional dishes, often lab-grown”

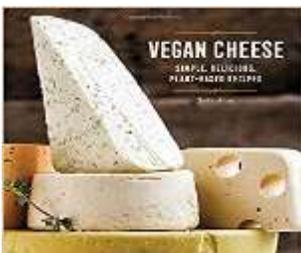
Kinvara, Denmark

HEALTH &
Wellbeing

Engineering Goodness

**\$5.2
billion**

projected value of the global
meat substitutes market in 2020



Identifying plants that blend like egg

Given the vilification of high levels of cholesterol found in eggs, and therefore mayonnaise, JUST mayo's yellow split pea formula is true engineered goodness



Vegan seafood: New Wave Foods and Ocean Hugger Foods enter US institutions as part of the 'Healthy for Life 20 by 20' initiative

Vegan prawns and plant-based raw tuna are free from marine toxins, high mercury levels & contaminants found in polluted ocean fish farms

WHAT DOES A SUCCESSFUL BUSINESS LOOK LIKE IN 2025?

IT IS TECH-ENABLED, BUT HUMAN-LED

Food and drink brands that can capitalise on the technologies used to profile consumers, and deliver guidance and health benefits.



IT TAKES A FRESH LOOK AT AGE AND LIFESTAGE

Food and drink can be the key to unlocking and activating the natural wellness our own body systems can achieve in different periods of our life.



IT INNOVATES ALTERNATIVES TO UNHEALTHY PRODUCTS

Brands that invest in R&D to solve for particular dietary problems and public health concerns will win.





I want to use my time to be as productive and sociable as possible, flowing from one thing to the next - and helped, not hindered, by tech...

Blurred dayparts **social shopping**
Supported & **On-the-go** Living in the cloud
enabled by tech 'decluttering' **D2C delivery**
Invisible and maximising **Eat & drink**
seamless solutions time
Changing work 'gig economy' **anywhere**
and home life Automated shopping
beacons and sensors fluid routines
Smart environments



WHAT'S DRIVING THE TREND?: DRIVERS



Growing digital connectivity

75.4bn different connected devices worldwide expected by 2025.¹



Changing lifestyles and household structures

By 2040, there will be an increase of 25% in single person households in the UK.²



Rapid urbanisation

Between 2016 and 2030, the number of cities with 500,000 inhabitants or more is expected to grow by 80% in Africa and 30% in Asia.³



HOW IS IT MANIFESTING?: SUB-TRENDS

Delivery 2.0

Direct-to-consumer takes on new meaning as goods can find their way to any convenient, and changing, personal location, not just personal address

Flexi-food

Eating and drinking occasions reshape and shift to suit consumers who seek to maximise their days (and nights), forcing rapid change for food & drink manufacturers and channels

Invisible Digital

Algorithm-based living means less exciting purchase decisions are easily outsourced for consumers

Living Workplace

The blurring between places for work, retail and social life leads to a reimagining of the workplace as an enjoyable and lifestyle-enhancing destination

Techlash

A counter-subtrend in many ways: Consumers become more averse to using technology and sharing their personal information, seeking meaningful and human connections to maximise living

Direct-to-consumer takes on new meaning as goods can find their way to any convenient, and changing, personal location, not just personal address



DELIVERY 2.0



HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers...



Malaysia

“Late night dining is still present in old and young Malaysians which makes 24/7 services or extended hours appreciated today, however, few businesses are being innovative enough with their offerings to deliver to exactly where the person is!”

Lavina, Malaysia



South Korea

“Lotte Mart continuously integrates technology into its shopping experience to provide a better and more convenient experience for the consumer”

Gagyeong, South Korea

Fuller LIVES

Delivery 2.0



Uber's latest promise to the major urban centres in which it operates is that delivery of goods via Uber will always take under 30 minutes from now on. **Uber is now the world's largest food delivery business.**

(Uber CEO Dara Khosrowshahi, 2018)



Smart locks that can be opened with one time passcodes free up consumers

Walmart has partnered with August SmartLock to enable its drivers to use one time codes to enter customers' homes to unpack and refrigerate any perishable food. Customers can track the delivery and even watch it via smart cameras.



Tagging every corner of the world in a universally accessible system so that unmapped and unregistered locations can be accessible

What3words provides a precise and simple way to share and access locations more quickly and accurately across the world, making no address off-limits for delivery.

Eating and drinking occasions reshape and shift to suit consumers who seek to maximise their days (and nights), forcing rapid change for food & drink manufacturers and channels

FLEXI-FOOD



HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers...

“Supermarkets are always trying to innovate for speed ... making life easy for shoppers no matter what the size of their basket”

Gagyeong, South Korea



South Korea



USA

“Whole Foods stores offer so many different types of shopping experience, whether you want to grind your own peanut butter there and then, eat fresh on site, or get groceries delivered to another place later on.”

Vincent, USA

Fuller LIVES

Flexi-food

Meal kits (scratch and semi-scratch cooking solutions / subscriptions) were the **fastest growing food channels in the US** in 2018, with total sales of **\$2.2bn**

(Nielsen, 2018)



Strategically placed meat vending machines in South Korea cater to late solo diners

Specifically adapted to fluid routines and small households as they provide one person portions



Algorithm-based pricing based on demand fluctuations pricing meals at differently at peak times

Gebni discounts fluctuate in real time and can range from a minimal 2% to a substantial 35%, even on a \$10 item

Algorithm-based living means less exciting purchase decisions are made automatically, and physical retail automates the point of purchase so consumers can live seamlessly



INVISIBLE DIGITAL

HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers...

“Products and services that do the job for you so you can relax, and get off the phone – that’s what people are looking for”

Marianna, Mexico



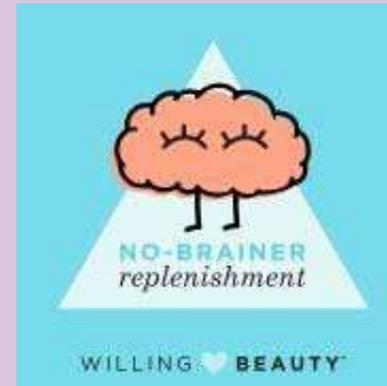
Mexico



Germany

“Whoever feels overwhelmed by choices turns to algorithms to make life easier. We no longer really have a choice in the matter, if we want to live life to the full!”

Paul, Germany



Fuller LIVES

Invisible Digital



The amount of smart devices connected to the internet is predicted to increase to 75.44 billion in 2025 from 15.41 billion in 2015

(Statista, 2017)



Smart bins mean an end to household shortages

GeniCan attaches to your bin and scans items when you throw them away before saving them onto your shopping list or ordering them directly through Amazon Dash



Microchips which function as swipe cards and payment methods

SJ Railways in Sweden accept tickets on a microchip embedded into your hand, which can be read with a smartphone

WHAT DOES A SUCCESSFUL BUSINESS LOOK LIKE IN 2025?

IT IS JUST AS GOOD AT MARKETING TO ALGORITHMS AS TO HUMANS

Making algorithms more likely to choose one brand over another in lower engagement categories



ITS PRODUCTS ARE ENABLED FOR 'WALK OUT SHOPPING'

Using sensors and app user-profiles so that automatic payment for the goods can be processed in breakthrough retail environments



IT HAS ADAPTABLE DISTRIBUTION PARTNERS

Exploiting the new channels of B2B and technologies enabling D2C – the best food and drink products will be those that are most accessible – meaning those that can make it all the way to the individual



Identity



I want to express the views and values of myself and my community, and have that uniqueness and creativity respected and celebrated...

Fragmentation of groups
Identity spectrums
Growth of niches
Creative networks
markets of one
Hyper-personalisation
fluid gender
Polyculturalism
empowered groups
culture
protection
Local, national and regional pride



61%
of consumers agree that nowadays we are free to shape our identities and transform ourselves in whatever way we want – vs 52% in 2014.

Global Monitor, 2017

WHAT'S DRIVING THE TREND?: DRIVERS



Multipolar world

Emerging and Developing markets' GDPs are predicted to grow by 7.4% CAGR from 2018-2025, compared to 3.89% CAGR for developing countries.



Economic empowerment of women

In China, 55% of new internet businesses are founded by women.



Rise of Protectionism

The world's top 60 economies have adopted more than 7,000 protectionist trade measures since the financial crisis of 2008



COMMUNITY & *Identity*

HOW IS IT MANIFESTING?: SUB-TRENDS

Identity spectrums

'Deaveraging' becomes an essential approach for meeting the diverse needs of consumers who identify with a broad variety of gender identities

Cultural grafting

Individuals select and amplify elements of their heritage and culture to forge their identity, drawing on countless other influences and inspired by global connectedness

Closing Gender Gaps

Women represent an increasingly disruptive, collective force, overturning cultural norms whilst creating affirmative new forms of culture and community

Access & involvement

Tapping into consumer creativity, collaboration is on the rise, as individuals want active involvement in, and the chance to make their mark on, their community and on the goods they consume

Polarising Politics

Political identities become polarised within groups, as volatility and protectionism prevent openness to other points of view

Political identities become polarised within groups, as volatility and protectionism prevent openness to other points of view

POLARISING POLITICS



HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers...

In South Africa, we're seeing an unfolding hyper-awareness of the economic, racial and gender disparities embedded in our society. The Born Free Spring is a wave of activism started by the youth generation who were never meant to know what apartheid is... They say things that older generations are afraid to say...



South Africa

Milisuthando, Johannesburg



Sweden

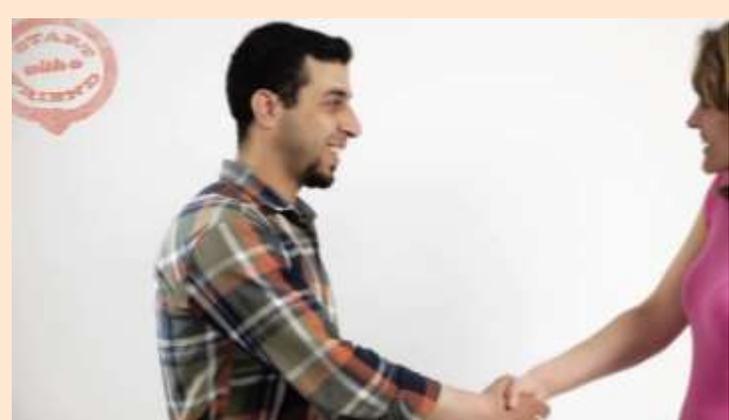
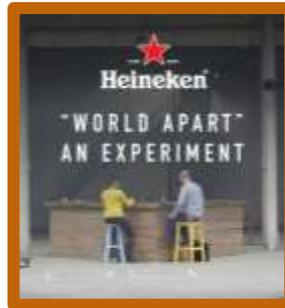
Countries like Sweden and Germany have struggled to integrate refugees, but this political tension has helped generate a wave of apps to connect refugees with their new neighbours... Users chat and arrange meet-ups, and can handle translation between Swedish, Arabic, Farsi and English.

Karin, Stockholm

Identity

Polarising Politics

OVER HALF of global consumers agree that they worry the values and traditions that they most appreciate about their country are being eroded by other cultural/global influences
(Global Monitor, 2017)



German initiatives seek to close the gap between Europeans and immigrants

Start With a Friend connects natives with immigrants for business and social



Closed online groups like Pantsuit Nation foster outspoken political tribalism

Pantsuit Nation started as a secret Facebook group in the States, encouraging voters to wear pantsuits to polling stations in support of Clinton. It began as a group of thirty and now has 3 million members.

COMMUNITY &

Identity

Consumer creativity is on the rise, as individuals want active involvement in, and the chance to make their mark on, their community and on the goods they consume



ACCESS & INVOLVEMENT



HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers...



Chile

“Food and drink are some of the first sectors to really bring the average consumer in to the creation process. Some of the best places to eat and drink include ‘build it yourself’ aspects”

Stefano, Chile

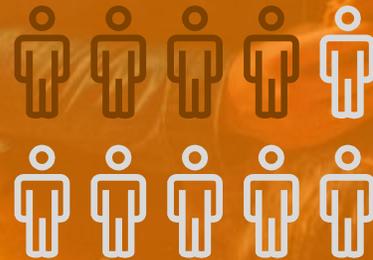


USA

“DEWALT, leader in the professional power tool sector, recently revealed that it has saved close to \$6 million in research costs along since launching its open insight community. This is a great example of the kind of collaboration we’re seeing”

Identity

Access & Involvement



4 in 10

millennials globally are actively seeking opportunities to co-create products with companies



Whisky company lets consumers blend their own scotch through DIY kit or the online portal

Different degrees of on- vs offline personalisation available



Google creates new medium for artists to paint in, bringing about renewed interest in fine art

Tilt brush lets consumers paint in 3D space with virtual reality. A room becomes a canvas and imagination a colour palette, and users can walk around their art creations.

WHAT DOES A SUCCESSFUL FOOD OR DRINK BUSINESS LOOK LIKE IN 2025?

IT HARNESSES THE CREATIVITY OF ITS CONSUMERS

With inspiration and innovation coming from a diverse range of identities and cultural influences, enabled by digital platforms



197
backers
\$10,835
pledged of \$10,000 goal
9
days to go

[Manage Your Pledge](#)

This project will be funded on Monday Jun 10, 3:07pm EDT.

Funding period
May 8, 2013 - Jun 10, 2013 (33 days)

IT HEROES INCLUSIVE FUNCTIONALITY

Products and services are designed for efficacy and use by all people, regardless of orientation, meaning that messages of inclusivity go beyond brand comms and packaging



IT IS A SOURCE OF JOY AND EASES TENSIONS

Within markets rife with political and societal tension, food and drink brands have an opportunity to generate happiness and bring communities together

