

Taking the Consumer Lifestyle Trends into 2018 and beyond

KANTAR CONSULTING

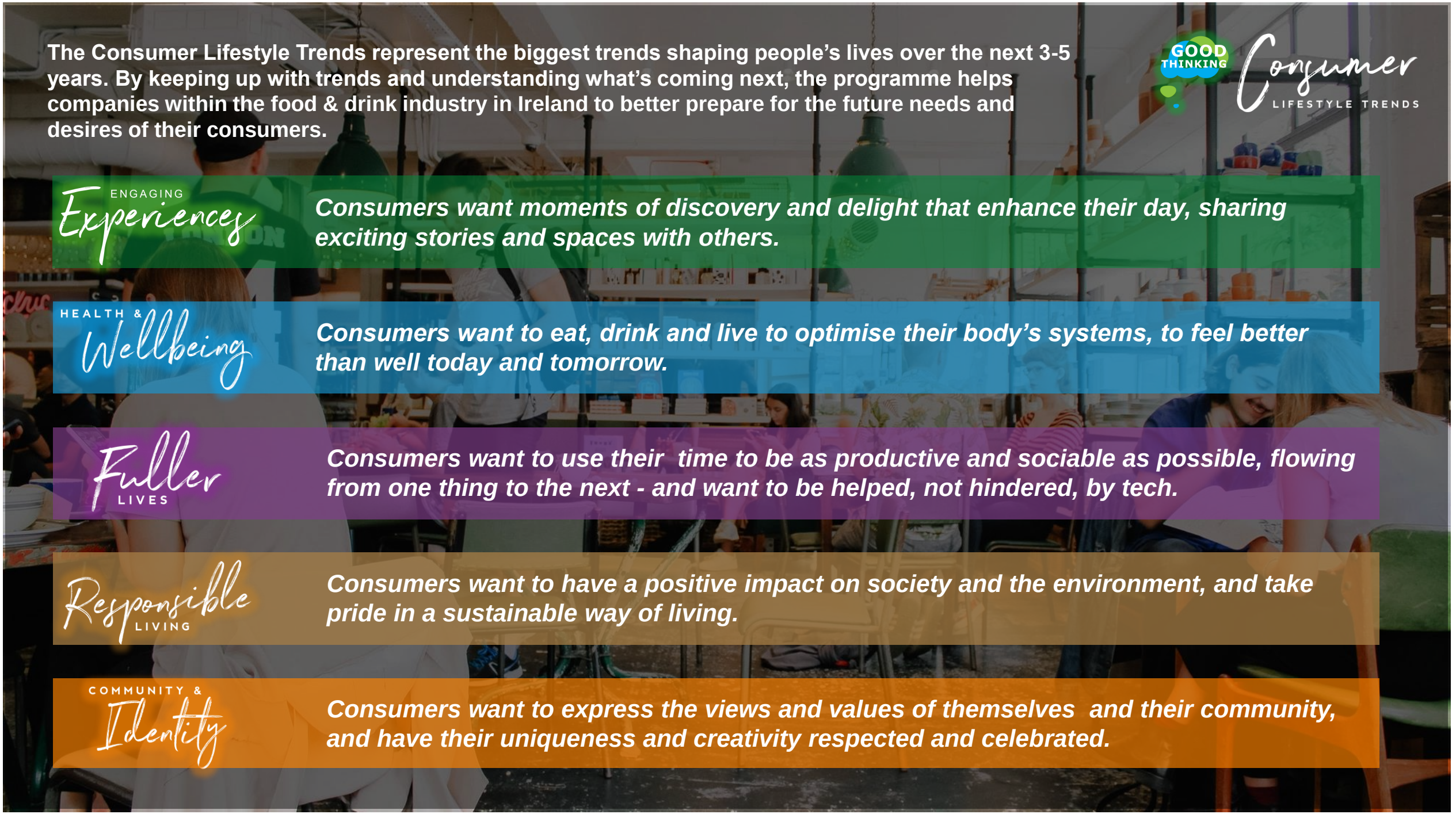


The Consumer Lifestyle Trends represent the biggest trends shaping people's lives over the next 3-5 years.

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.

In this 2018 edition, we take a fresh look at the big forces at play in the world, and broad shifts in consumer attitudes, values and behaviours globally. We explore how these developments are driving trends in consumers' lives.

Enjoy - we hope you find it interesting and useful.



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.

GOOD THINKING Consumer LIFESTYLE TRENDS

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.

Consumer LIFESTYLE TRENDS

ENGAGING Experiences



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

Consumer
LIFESTYLE TRENDS

ENGAGING Experiences

Value-creation networks

product journeys and stories

AR and VR enhancement

New space design

rise of the storyteller culture

digital & physical experiences merge

experience design

peer-to-peer sharing and exchange

Rise of service, experience and time exchanges

trusted reviewer networks

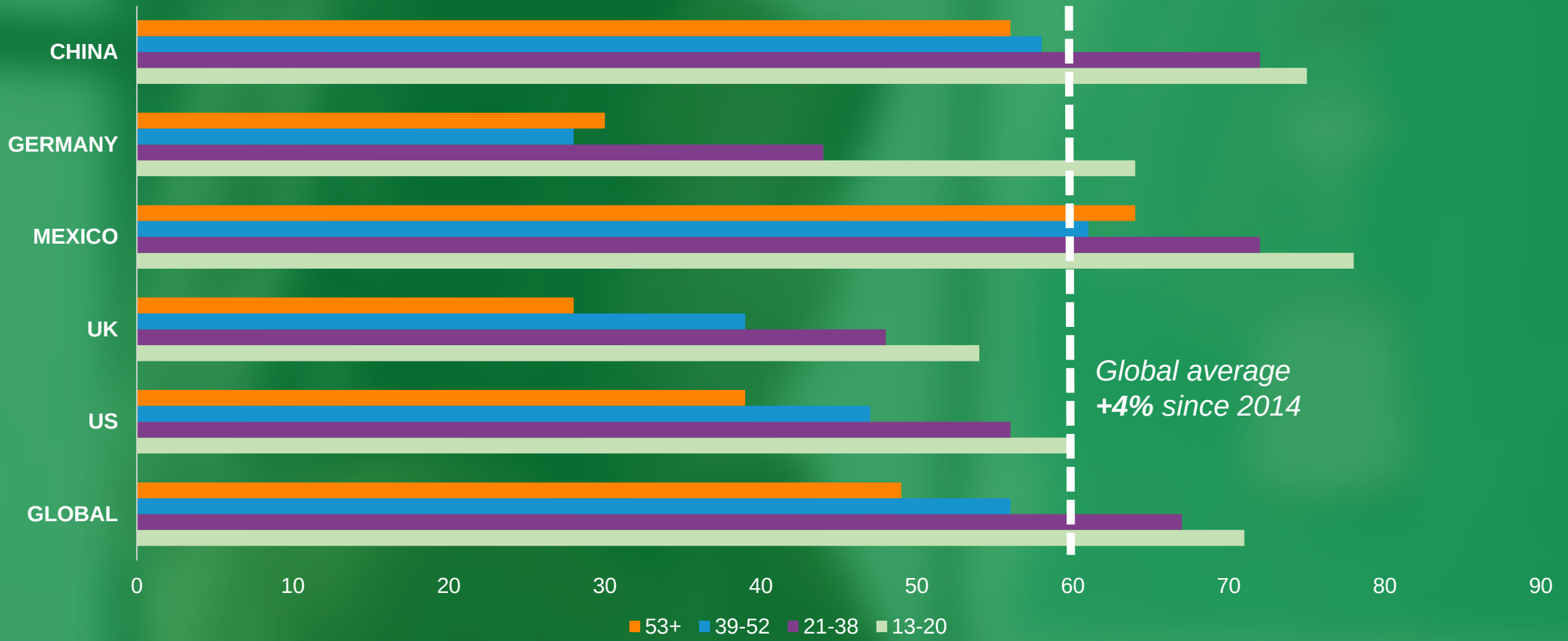


Consumer LIFESTYLE TRENDS

ENGAGING Experiences

"I am always looking for new experiences and sensations that will liven up my everyday activities"

(% agree)

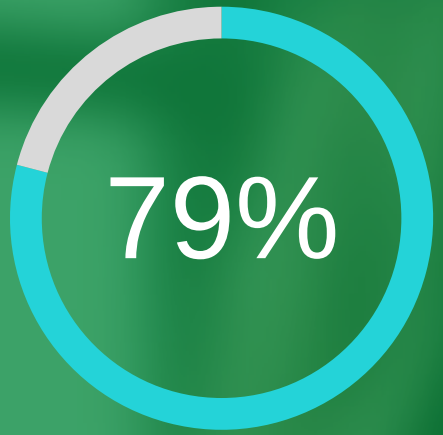


Consumer LIFESTYLE TRENDS

ENGAGING Experiences

"How likely are you to splurge on out-of-home leisure activities with family or friends, (e.g. eating out at a restaurant; visiting the cinema, sports events or theme parks)"

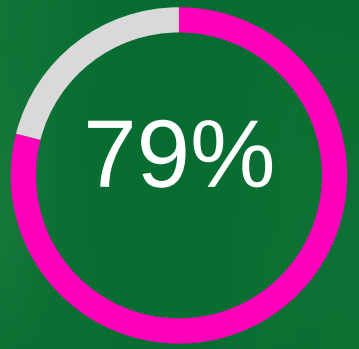
(% very/somewhat likely)



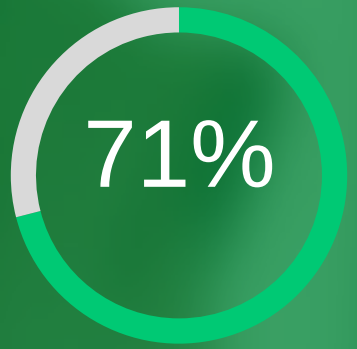
Global

~0% since 2015

Likeliness to spend on engaging experiences out of home remains very high in key markets



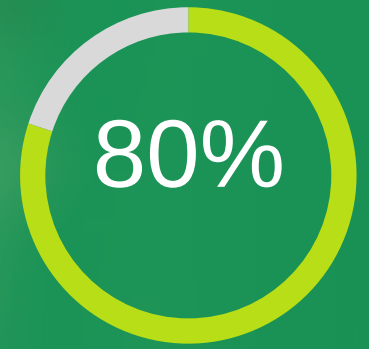
US



UK



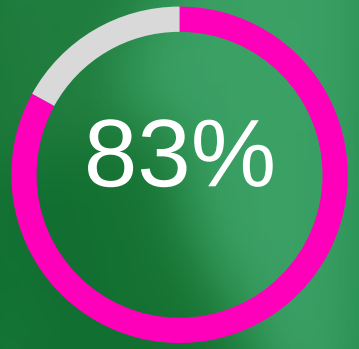
Mexico



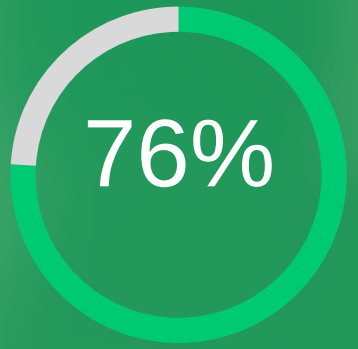
Germany



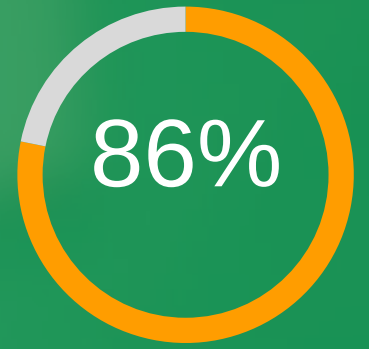
China



Malaysia



Japan



South Korea

Consumer LIFESTYLE TRENDS

ENGAGING Experiences

WHAT'S DRIVING THE TREND?

Multipolar World

Whilst productivity booms in a few markets, post-materialism sweeps developed markets and new experiences and cuisines are brought to different markets around the world

Previously marginalised groups gain louder voices, where once the US and Europe dominated, developing countries are now in an increasingly powerful position – reflected in new food fusions and international flavour hubs in cities

Growing Digital Connectivity

The continuing breadth of social connectivity is upending the way we communicate and experience the world, and each others' worlds.

58% already say they are on the internet constantly throughout the day (vs 49% in 2015).

Changing lifestages and household structures

People's openness to non traditional routines and careers goes hand in hand with the new generations of consumer who prioritise *experiences* over material possessions

58% of Millennials say it's "extremely important to prioritise experiences over material possessions", vs 48% of the generation before.

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

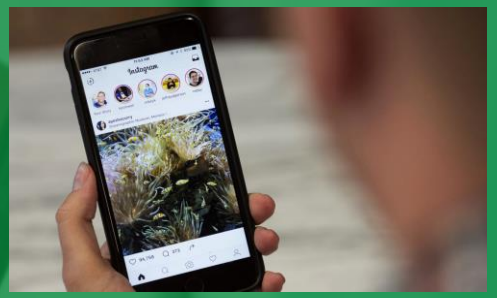
South Korea

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. "

Gagyeong, South Korea

ENGAGING
Experiences

Story Culture

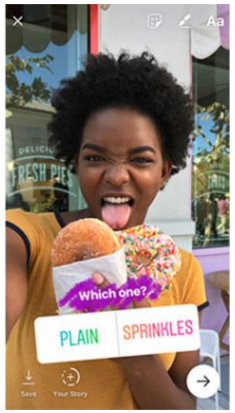


More than 500 million Instagram users open the app every day, and **300 million** of them are watching Stories daily.[1]















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

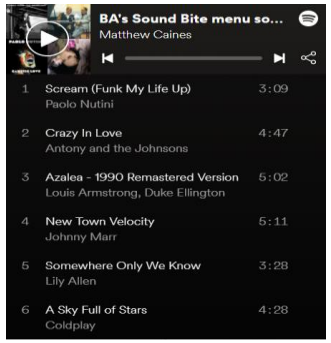
ENGAGING
Experiences

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

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

PEER-TO-PEER ENGAGEMENT





HOW IS IT MANIFESTING?

Through the eyes of our Streetscapers…

Vietnam

"With the help of social media, such as Facebook and blogs, consumers create networks for exchanging information about products and brands"

Julian, Vietnam

Japan

"There are huge virtual communities coming together around the online sharing of food and experiences. There are TV shows and YouTube channels dedicated to people sharing what they eat and food companies are launching items to target these consumers."

Patrick, Japan

ENGAGING
Experiences

Peer-to-peer Engagement

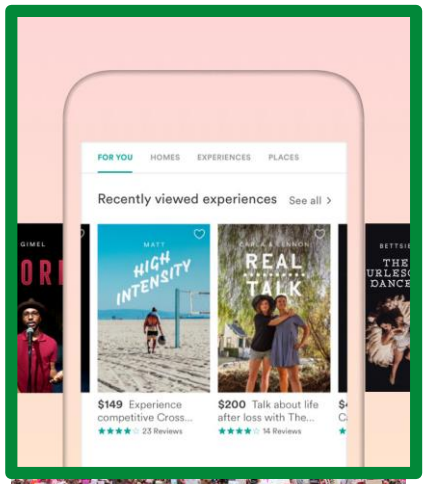


Between the five key sectors of automotive, hospitality, finance, staffing and media streaming, PwC estimate the revenue generated by the sharing economy will increase from the current $14 billion to $335 billion in 2025.[1]















Tesco became the platform through which consumers could connect and express their feelings in the Food Loves stories campaign

The campaign centred around the person behind the recipe and the relationships they hold around a dish



Peanut allows mothers to connect and access experiences based on shared interests outside of motherhood

It even extends to sharing and exchanging skills whilst on maternity leave

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

ENGAGING Experiences

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.



Consumer LIFESTYLE TRENDS

Responsible LIVING



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

CONSUMER Lifestyle TRENDS

Responsible LIVING

awareness of planetary limits

Eco-incubators

Rise of scrutiny

blockchain revolution

intense media coverage

resource scarcity

activist investment

local initiative

conscious lifestyle change

in-home contamination scanners

shifting regulation

rise of innovation for sustainability

Sustainable as premium



55%

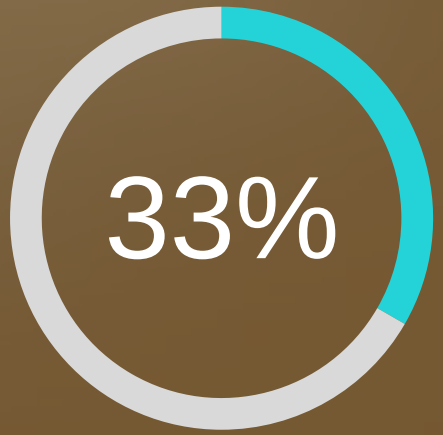
increase in searches for **'plastic recycling'** this year following Blue Planet's episode on marine plastic

Hitwise online search behaviours, 2018

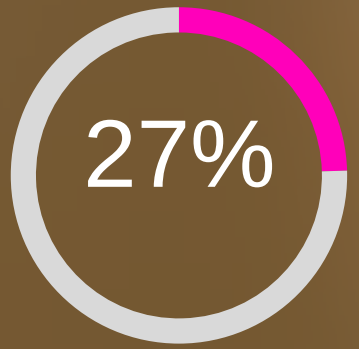
CONSUMER Lifestyle TRENDS

Responsible LIVING

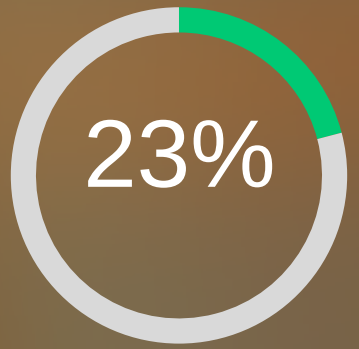
"I mainly buy from companies who have a clear, committed environmental policy for environmental reasons"



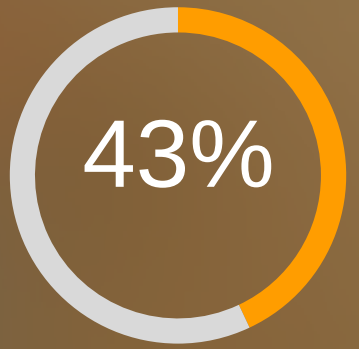
Global
+1% since 2015



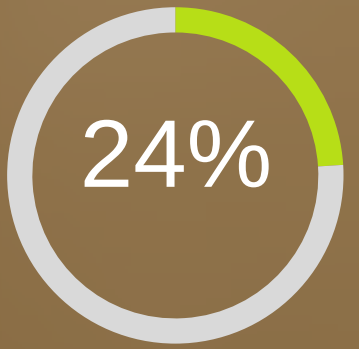
US (+1%)



UK (+2%)

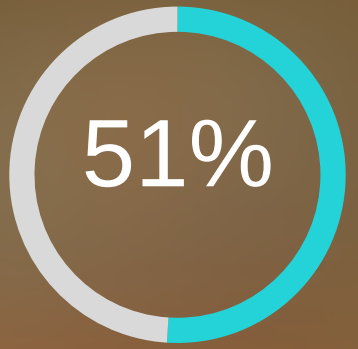


Mexico (+5%)

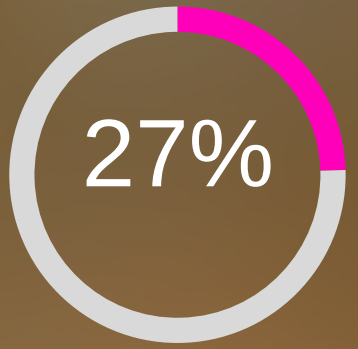


Germany (-2%)

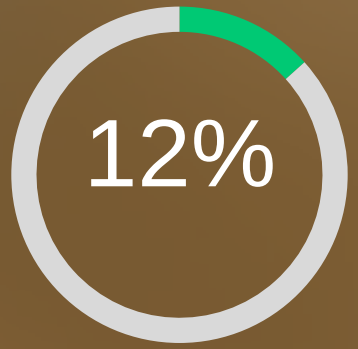
The subset of highly environmentally-conscious consumers is small but growing fast in most markets…



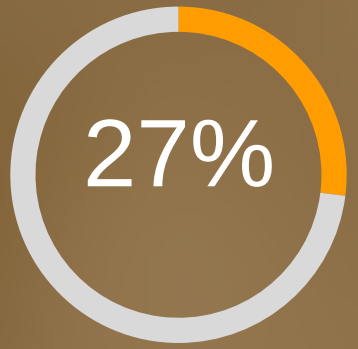
China (+4%)



Malaysia (~)



Japan (~)



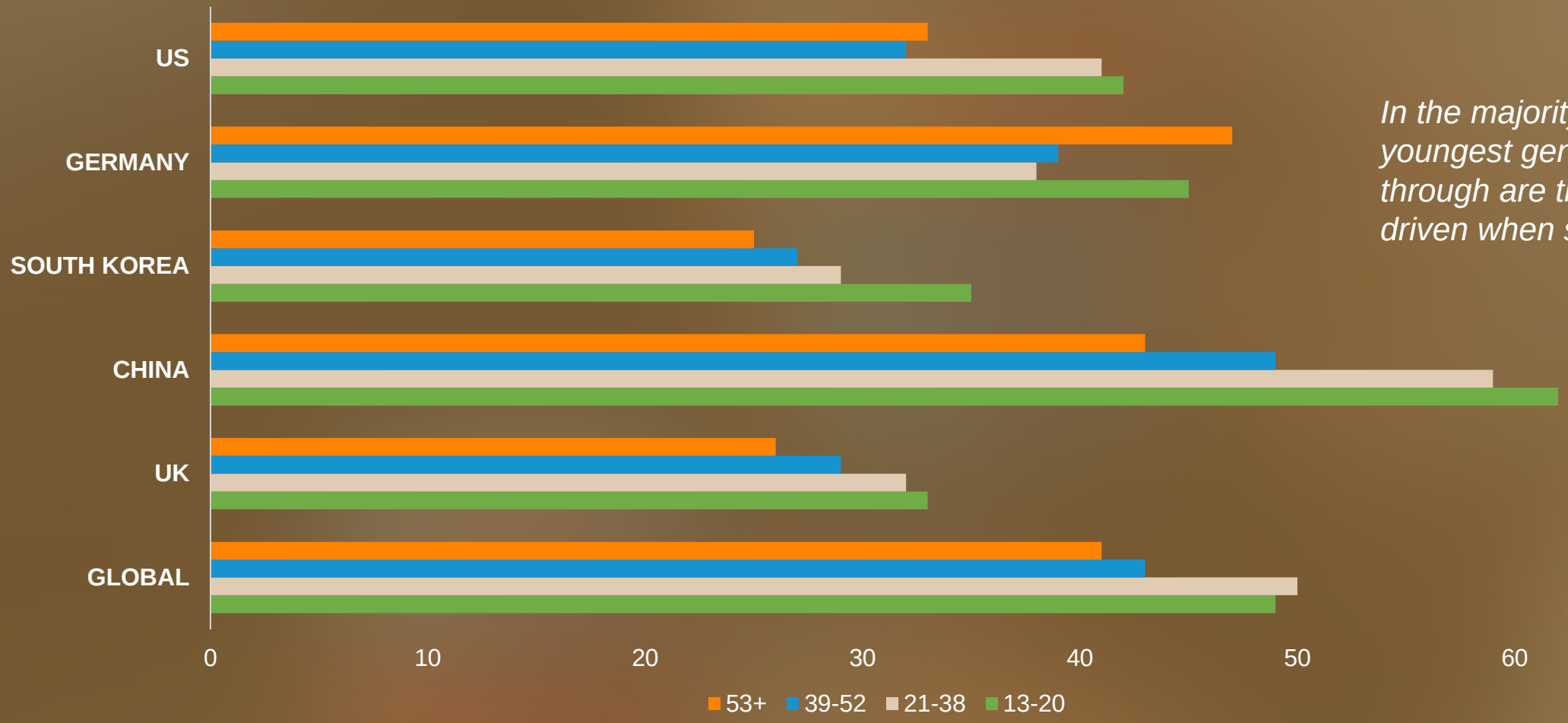
South Korea (+6%)

%agree

CONSUMER Lifestyle TRENDS

Responsible LIVING

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



In the majority of markets, the youngest generations coming through are the most cause-driven when shopping

(% Extremely Important/)

CONSUMER Lifestyle TRENDS

Responsible LIVING

WHAT'S DRIVING THE TREND?

Increasing Environmental Pressure

Consumption and production patterns will be significantly altered by increasing resource constraint. Awareness around sustainability is becoming part of mainstream consideration.

A third of consumers (33%) are now actively choosing to buy from brands they believe are doing social or environmental good.[1]

Rise of protectionism and nationalism

There has been a surge of support for political and economic insularity, with rising advocacy for protectionist measures, from an industrial and environmental point of view.

As tariffs are imposed against imported goods, consumers turn away from products made or grown in far away locations and will turn to local products where they can see the value as well as the clear journey the product has taken before landing on their plate.[4]

Rapid Urbanisation

Urban populations are rapidly increasing, having significant impacts on food systems and driving intensive farming. It also drives a proliferation of premium, sustainable brands in urban areas.

More than 80% of people living in urban areas are now exposed to air quality levels that exceed safe limits. [6] Food production is one of the leading causes of air pollution and governments are under growing pressure to open new avenues of cleaner production.

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

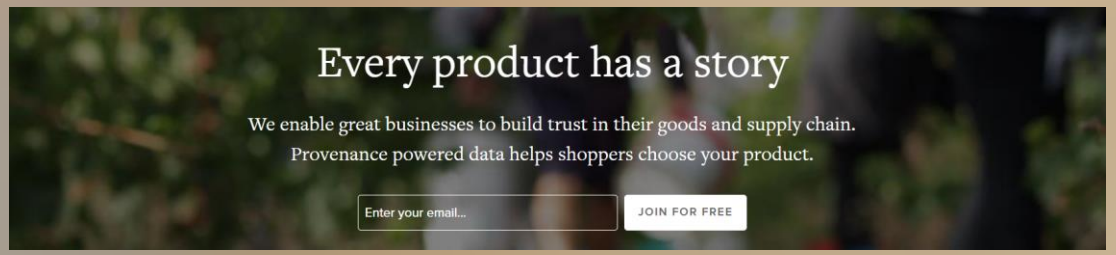
With global longevity increasing and changing population status quo, consumer and government focus on taking proactive measures to live better, not just longer intensifies

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





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

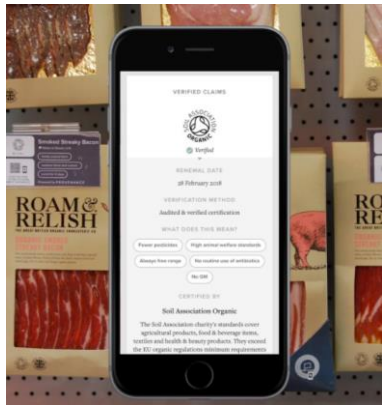
Responsible LIVING

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]









Soil Association





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

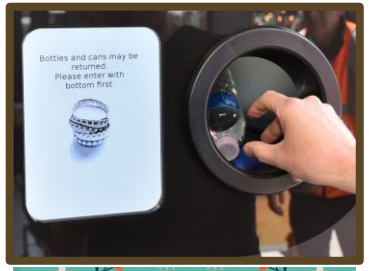
Innovating Against Waste



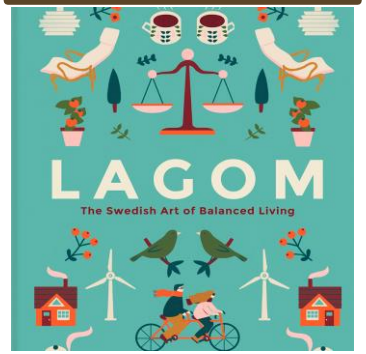
KeepCup, the Australian reusable cup brand, sold **a quarter of a million** of their barista-standard cups in the UK in the run up to Christmas - the biggest three months of sales in its history and just before the 25p “latte levy” was imposed.















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



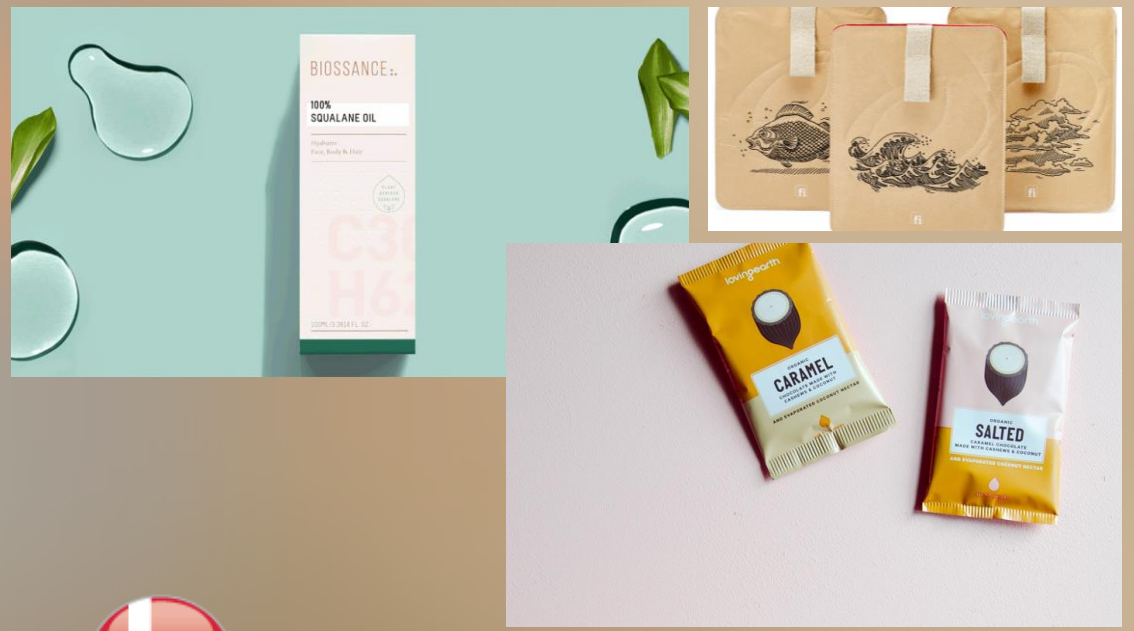
Eliminating waste from the consumption cycle - Plastic Eating Enzymes

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…

United Arab Emirates

"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

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.

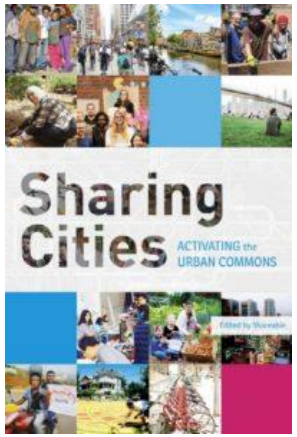
Vincent, USA

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?’

Responsible LIVING

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



HEALTH & Wellbeing



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

Consumer LIFESTYLE TRENDS

HEALTH & Wellbeing

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%

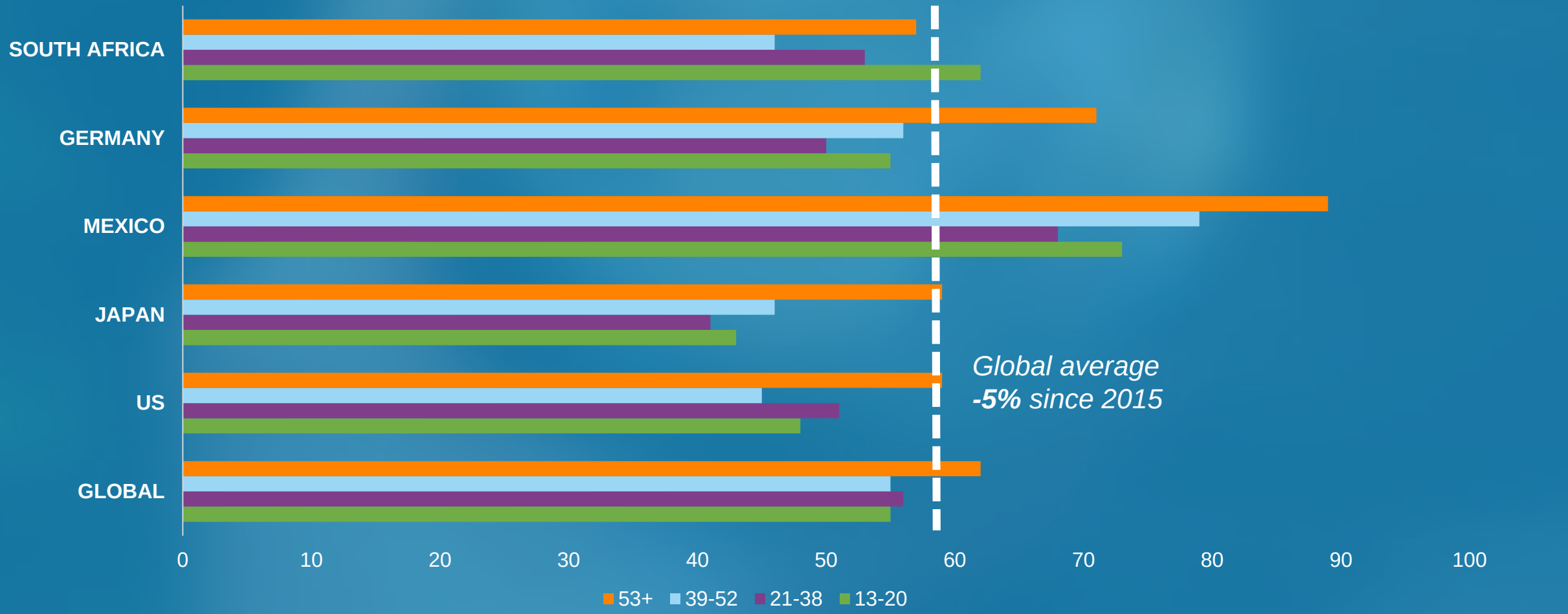
of **global consumers** say they are likely to buy products or services that will enhance their **sense of emotional wellbeing** in the next 12 months

Kantar Consulting Global Monitor 2017

Consumer LIFESTYLE TRENDS

HEALTH & Wellbeing

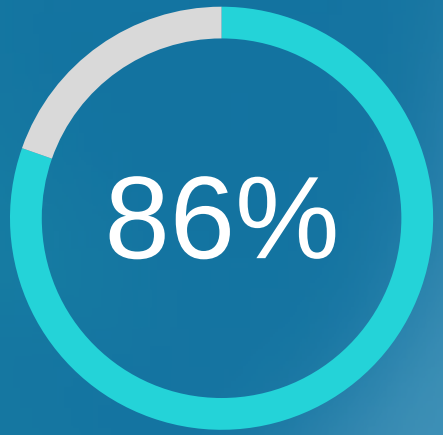
"I think having the tools to monitor my own health on a regular basis is very important"



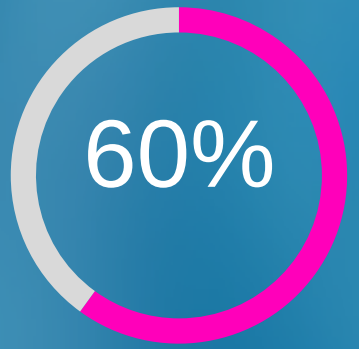
Consumer LIFESTYLE TRENDS

HEALTH & Wellbeing

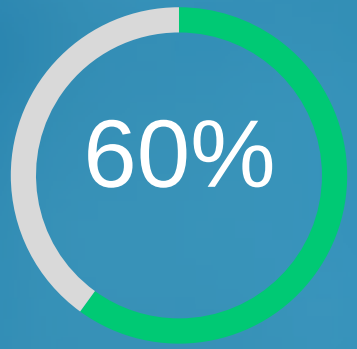
"Not getting enough sleep causes me stress"



Global
+1% since 2015



US



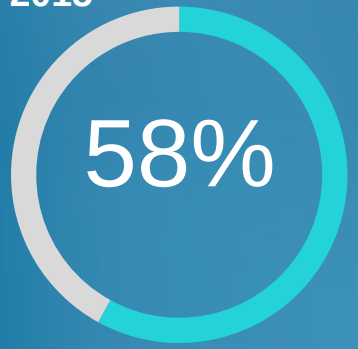
UK



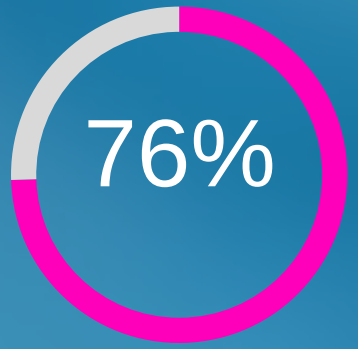
Mexico



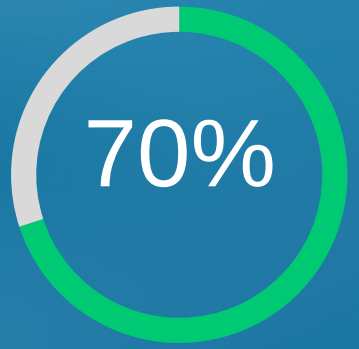
Germany



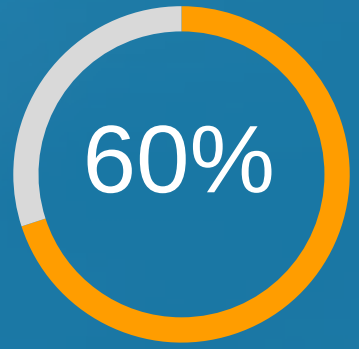
China



Malaysia



Japan



South Korea

Consumer LIFESTYLE TRENDS

HEALTH & Wellbeing



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 dour 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

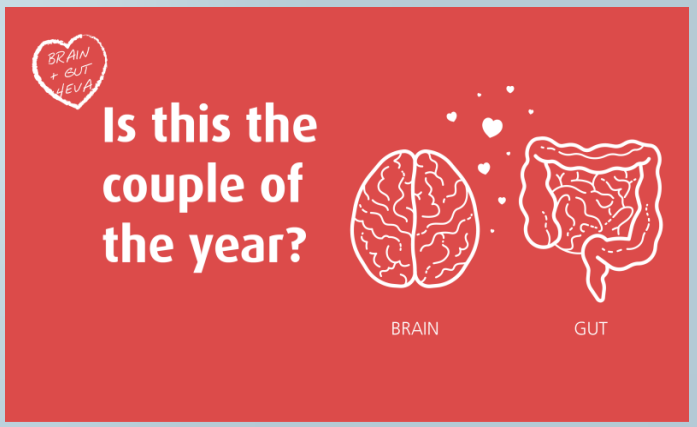
With global longevity increasing and changing population status quo, consumer and government focus on taking proactive measures to live better, not just longer intensifies.

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



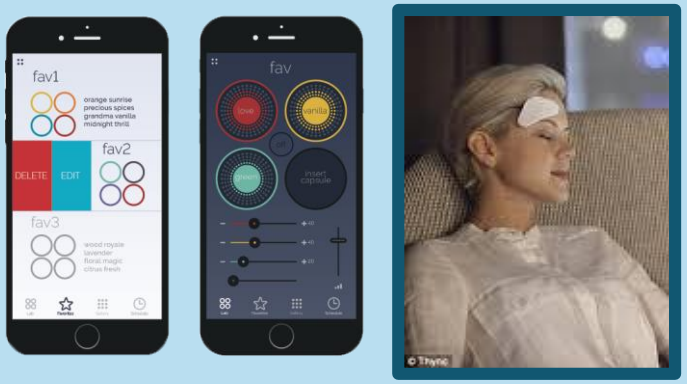












Apps that facilitate mental health

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

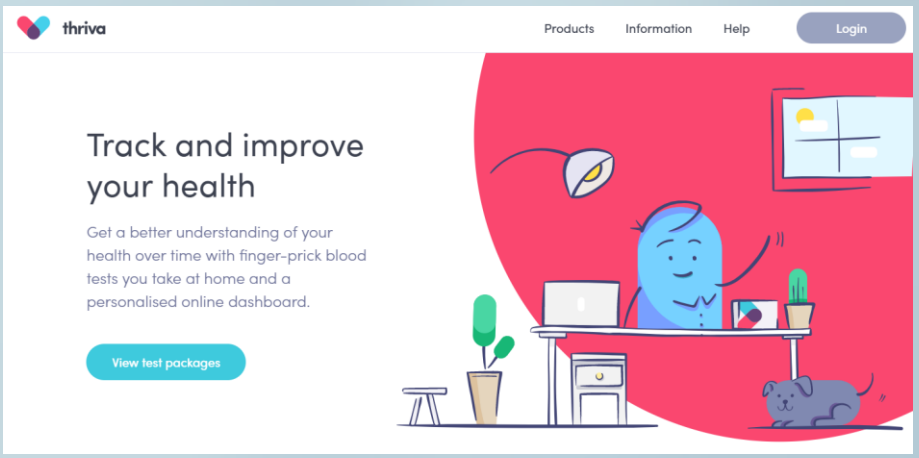
High Mood Food –natural, fermented and living food, promoting the link between digestion and mental health

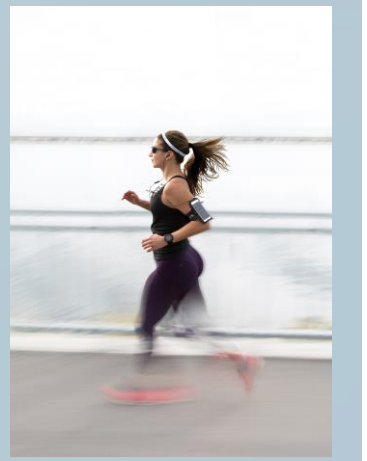
WellWell – organic cold-pressed juice with biodynamic (fermented) lemon, a performance enhancer and counter-fatigue drink

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…

Mexico

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

Mariana, Mexico

Germany

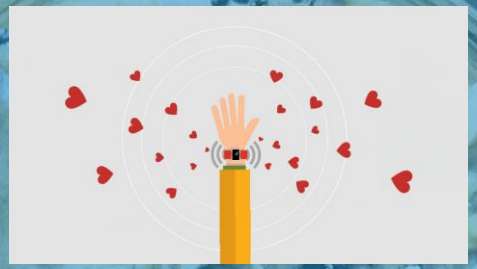
“Consumer choices are made out of practicality and better, tech-enabled insight as they wish to make reasoned and responsible decisions.”

Paul , Germany

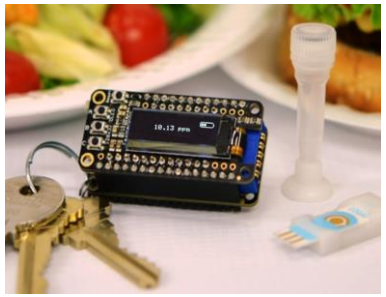
HEALTH &

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.

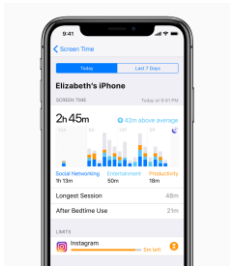














iEAT allergen detection system, a portable key ring food scanner and 'allergen alert'

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…

Malaysia

"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

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-inflammatories 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

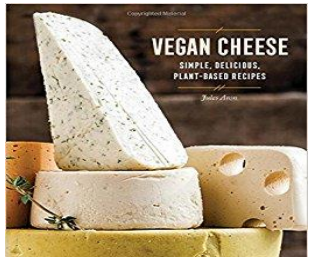
$5.2 billion

projected value of the global meat substitutes market in 2020







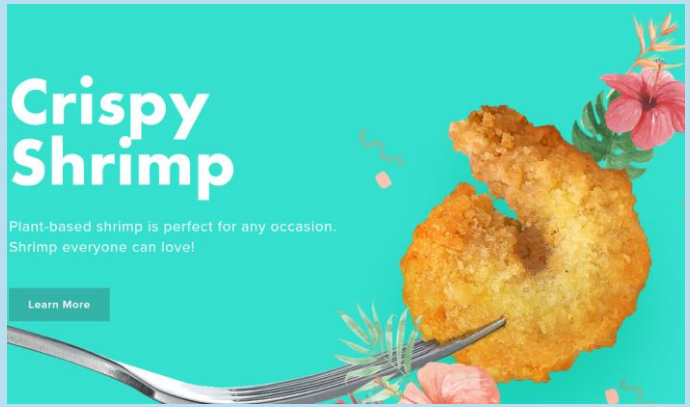






Identifying plants that blend like egg

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



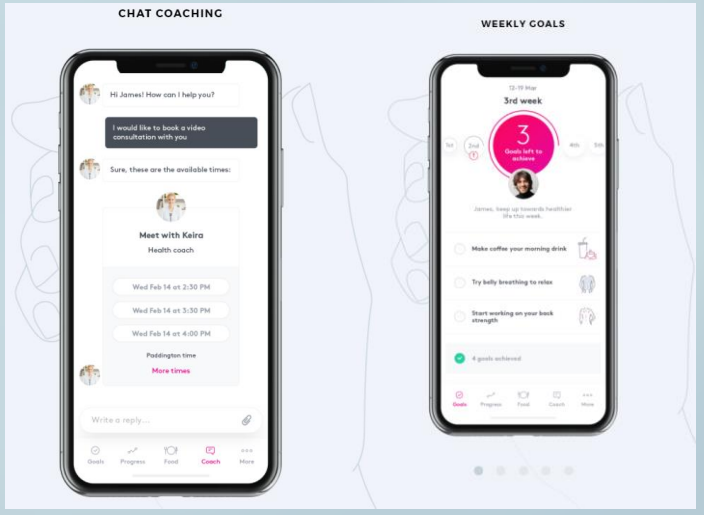
Vegan seafood: New Wave Foods and Ocean Hugger Foods enter US institutions as part of the 'Healthy for Life 20 by 20' initiative

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

HEALTH & *Wellbeing*

From awareness of the different needs for stages of teen development to the nuanced protein needs of the older generation, we are seeking age-targeted solutions for living better, not just longer

OPTIMISING AGE





HOW IS IT MANIFESTING?

Through the eyes of our Streetscapers…

United Arab Emirates

"In the UAE We see younger generations all very health conscious compared to the baby boomers in the way they eat and their choices, older generations take a smaller but growing interest in where their food comes from and the health effect of their everyday choices"

Zaina, UAE

South Korea

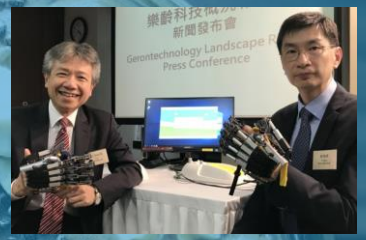
"There is a recognized respect in older generations' ways of life, returning to farm and rural settings is increasing, and Jeju Island, a Korean vacation island, has become a dream destination for many young Koreans to realize the ideal slow-lifestyle exemplified by older generations"

Gangyeong Seo, South Korea

HEALTH &

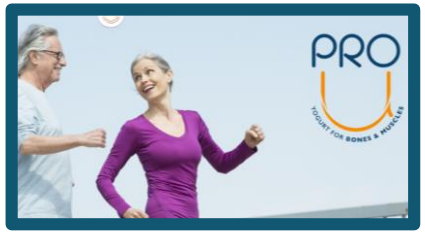
Wellbeing

Optimising Age

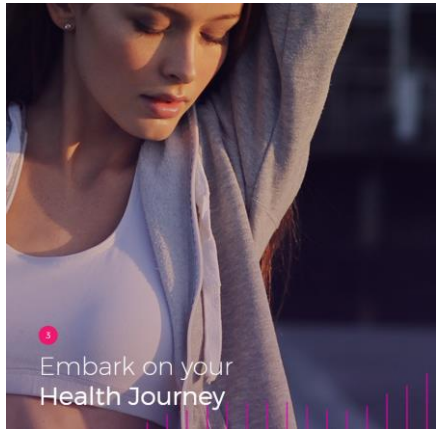


This year, Hong Kong hosted its first **‘GeronTech’** summit, exploring ageing and technology to find solutions for the market’s ‘super-aged’ population, funded by government and private players













Chinese dairy giant Mengniu is growing sales by 20-30% this year with age-targeted product launches

‘Future Star Growth Milk’ teamed up with Disney Shanghai to tap into the 8-10 years and early adolescent market



Chinese restaurant Kaze no Oto has developed new cooking methods to cater to the country’s aging population

The ‘Seniors’ menu at this restaurant is processed, supplemented with enzymes and remoulded into original form, making it easier to chew and digest

HEALTH & *Wellbeing*

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.



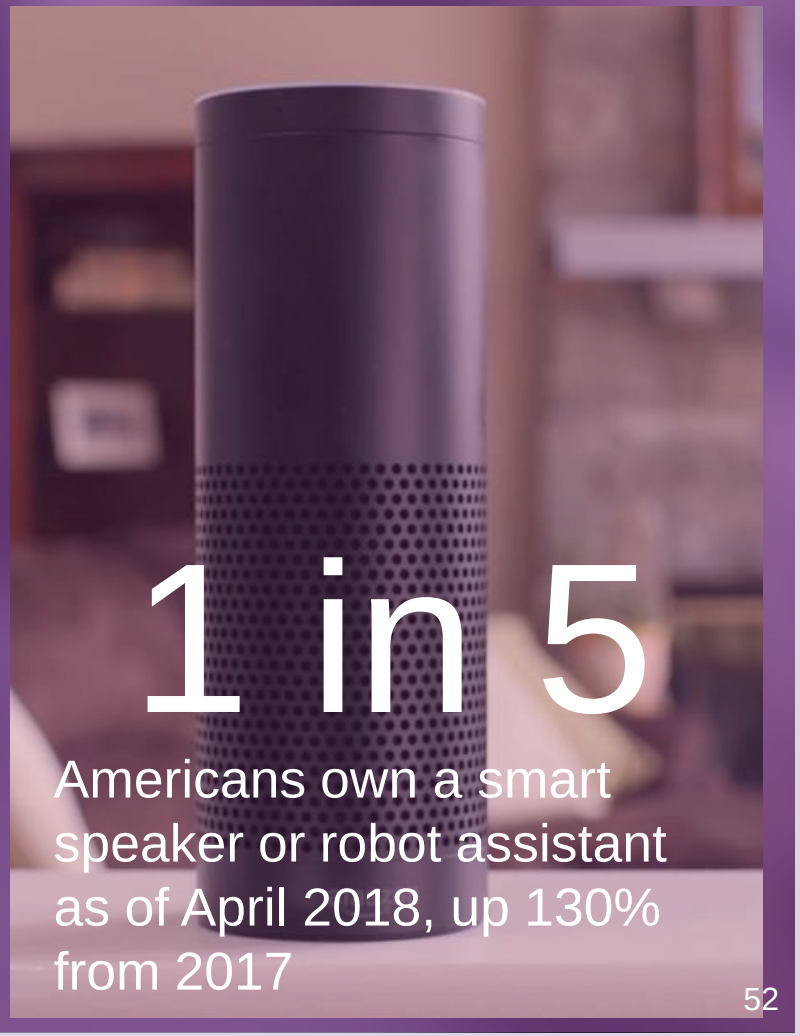


> **I want to use my time to be as productive and sociable as possible, flowing from one thing to the next - and helped, not hindered, by tech…**

Consumer LIFESTYLE TRENDS

Fuller LIVES

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



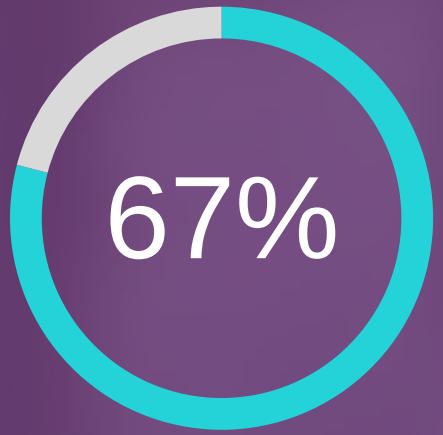
1 in 5

Americans own a smart speaker or robot assistant as of April 2018, up 130% from 2017

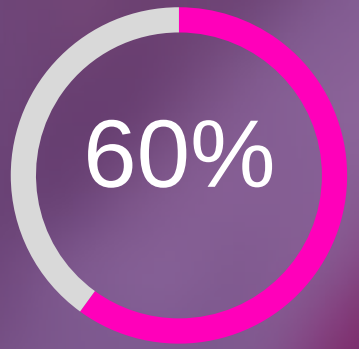
Consumer LIFESTYLE TRENDS

Fuller LIVES

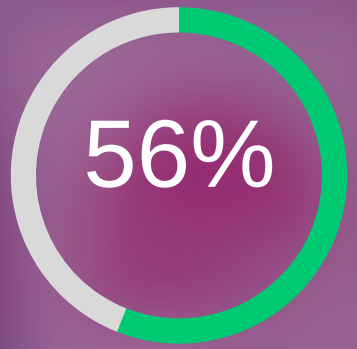
"More and more, I am looking for ways to simplify my life"



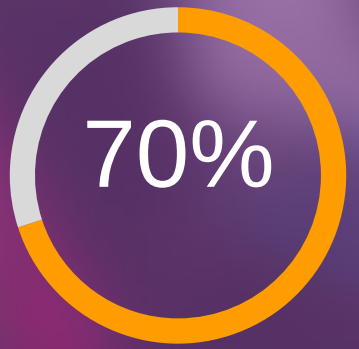
Global
~0% since 2014



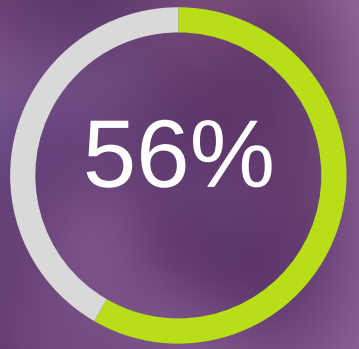
US



UK

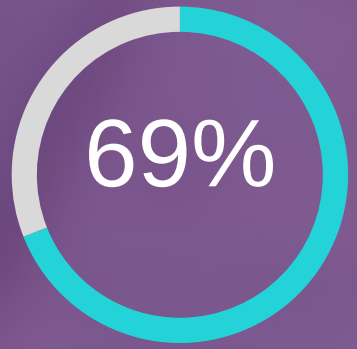


Mexico

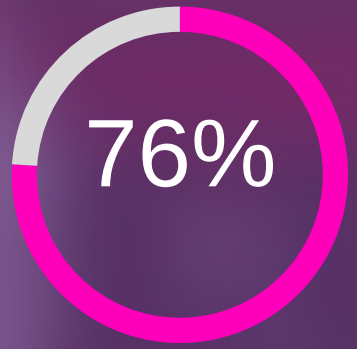


Germany

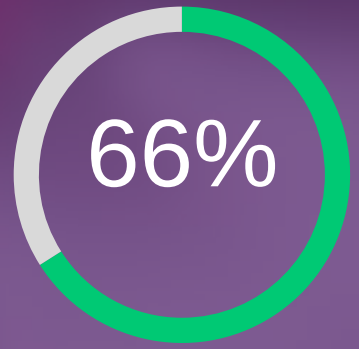
The further East you travel, the greater the desire for simplifying life's complexity…



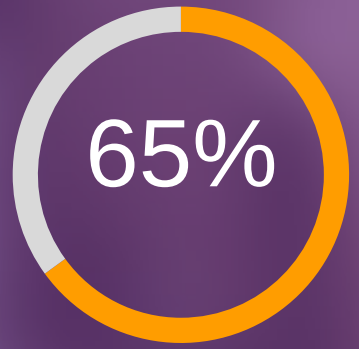
China



Malaysia



Japan



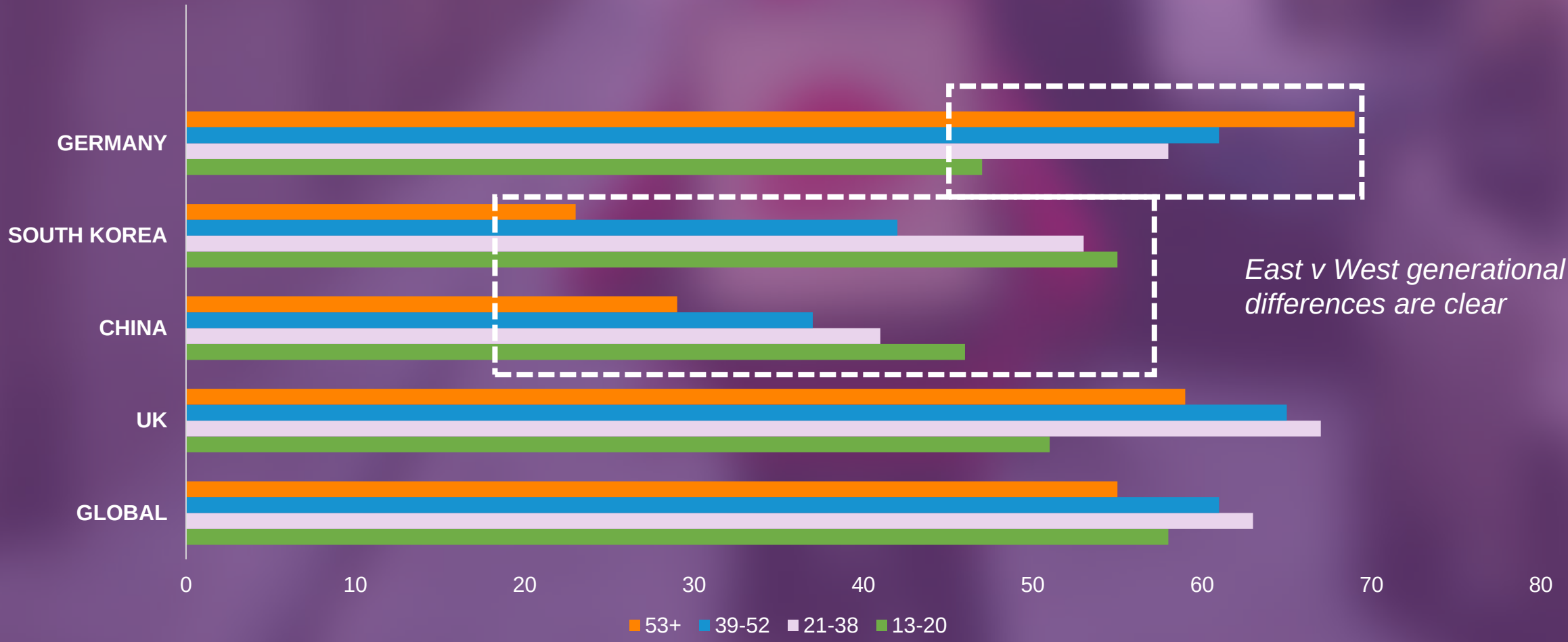
South Korea

(% agree strongly/slightly)

Consumer LIFESTYLE TRENDS

Fuller LIVES

"It is important for me to sometimes disconnect from online and mobile communications"



East v West generational differences are clear

Consumer LIFESTYLE TRENDS

Fuller LIVES

WHAT'S DRIVING THE TREND?



Growing digital connectivity

This macro driver enables and drives Fuller Lives. The youngest generations have never experienced a life devoid of data and digital lifestyle solutions

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).



Changing lifestages and household structures



Economic empowerment of women

Changing career trajectories, household structures, and gender roles all point towards flexible lifestyles that value productivity and sociability above the traditional markers of success such as home ownership, marriage and children

By 2020, the number of single-person households is estimated to rise to 415 million globally, 18% more than in 2016. 1



Rapid urbanisation

Urbanisation brings with it opportunities to maximise living; more people seeking creativity and collaboration, in dense and digitalised spaces

By 2050, two-thirds of the world's population will live in cities, compared with just over half today.

WHAT'S DRIVING THE TREND?: DRIVERS



Growing digital connectivity

75.4bn different connected devices worldwide expected by 2025.[1]



Changing lifestages 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]

Fuller LIVES

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

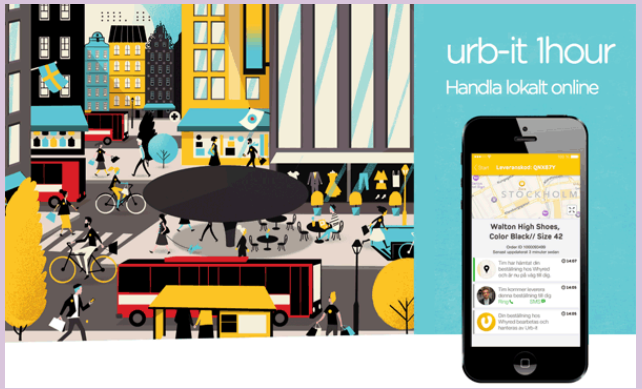
Techlash

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)







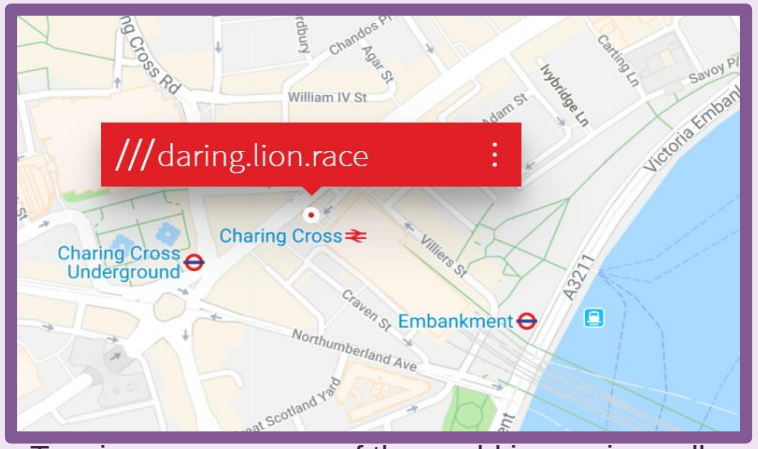






Smart locks that can be opened with one time passcodes free up consumers

Wallmart 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.

Fuller LIVES

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…

South Korea

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

Gagyeong, 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

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

Fuller LIVES

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…

Mexico

"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

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

Invisible Digital



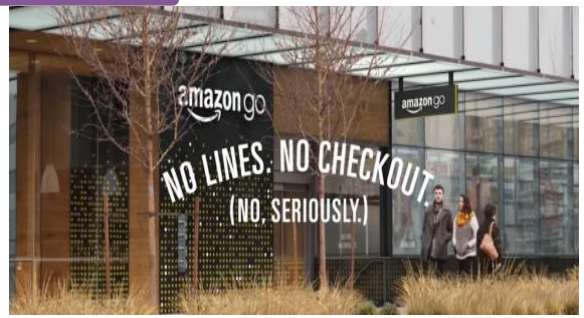
The amount of smart devices connected to the internet is predicted to increase to 75.44 billion in 2025 from 15.41 billion in 2015

(Statista, 2017)









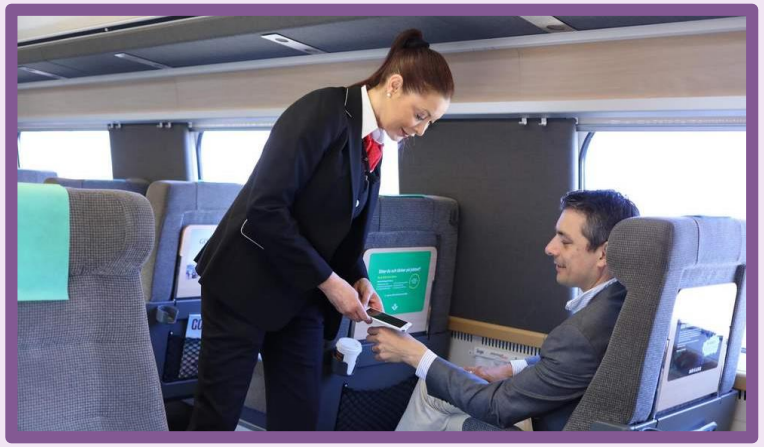






Smart bins mean an end to household shortages

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

Fuller LIVES

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

LIVING WORKPLACE





HOW IS THIS 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, more people are willing to go out and spend more on leisure."

Stefano, Chile



Denmark

"Co-working, community dining, flexibility in your work life… are largely established in Copenhagen as the optimum way of life"

Kiva, Denmark

Fuller LIVES

Living Workplace



WeWork recently acquired **Meetup** social community platform for **$200 million**, strengthening the social aspect (with a 35 million strong member base) of their living/working spaces.













ARUP design living and working buildings

For employers-come-landlords who want to streamline the experience of work and play and inspire workforce communities – for example, Samsung's Green Tomorrow buildings



Santander Work Café redesigns high street space for leisure and business

The spaces host talks on useful topics such as finance, marketing or design

Fuller LIVES

A counter-subtrend in many ways: consumers become more averse to using technology and sharing their personal information, seeking meaningful and human connections and moments of digital detox





TECHLASH

HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers…

United Kingdom

Adults in the UK are spending an incredible 7 hours and 56 minutes a day consuming media, up 9% from 2017.

IPA, 2017

South Korea

South Korea has built a National Centre for Youth Internet Addiction Treatment to tackle technology addiction that is causing violence.

Gagyeong, South Korea

Techlash

In 2018, the World Health Organisation officially recognised digital gaming addiction as a mental health disorder.

(WHO, 2018)

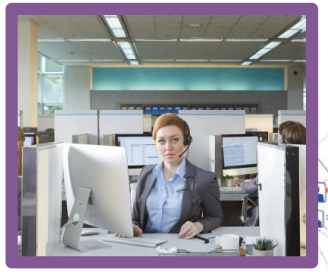


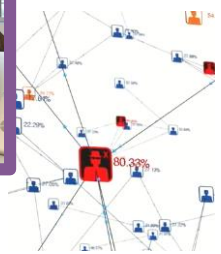










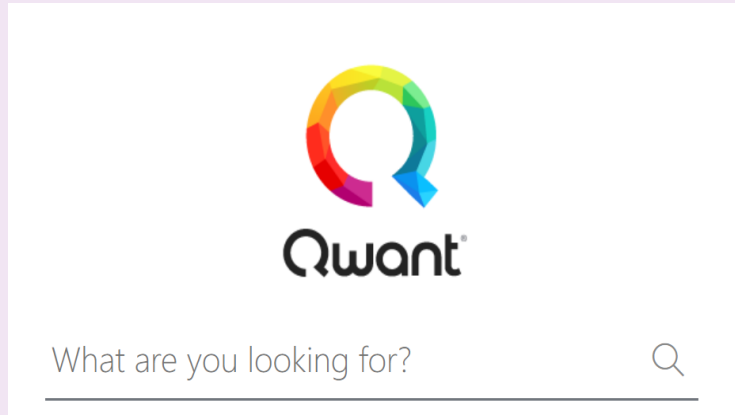






Android apps encourages consumers to take control of their digital lives

Google launched its digital wellbeing initiative to help consumers understand their tech usage and take control of it



Backlash against targeting and tracking mean consumers want to be forgotten

Qwant is a search engine that applies strict neutrality rules to search results, they do not use cookies or tracking devices to establish profiles around users

WHAT DOES A SUCCESSFUL BUSINESS LOOK LIKE IN 2025?

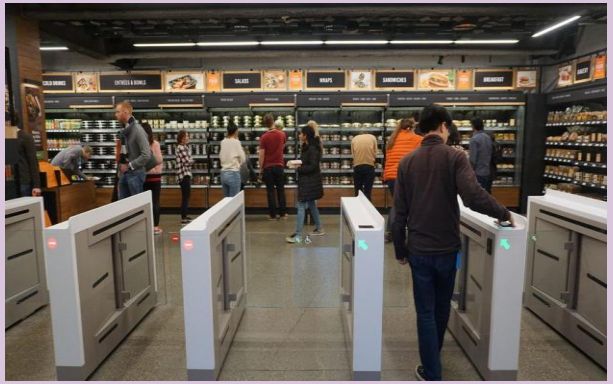
IT IS JUST AS GOOD AT MARKETING TO ALGORITHMS AS TO HUMANS

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



COMMUNITY & Identity



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

Consumer LIFESTYLE TRENDS

COMMUNITY & Identity

Fragmentation of groups
fluid gender
Identity
Polyculturalism
spectrums
Growth of niches
empowered
Creative networks
groups
markets of one
Culture
culture
Hyper-personalisation
creation
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.

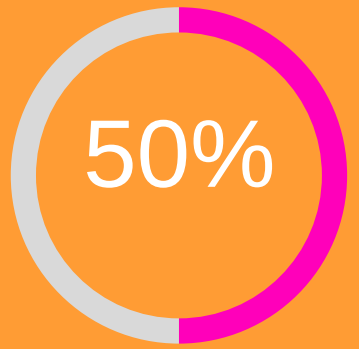
Global Monitor, 2017

How likely do you think you are to be at risk from discrimination on the grounds of gender, religion, ethnicity, sexual orientation etc?

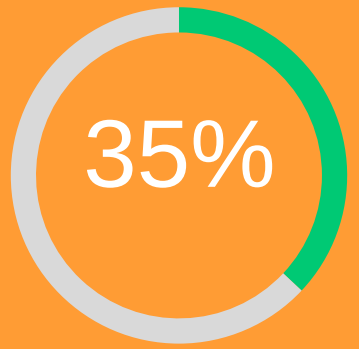


Global
-4% since 2016

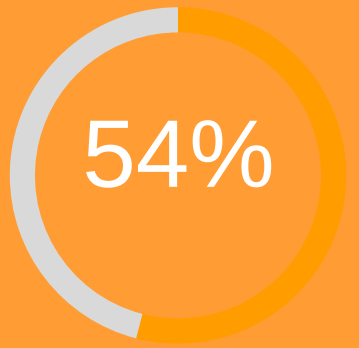
With demographic change and increased migration, perceived risk of discrimination decreases dramatically…



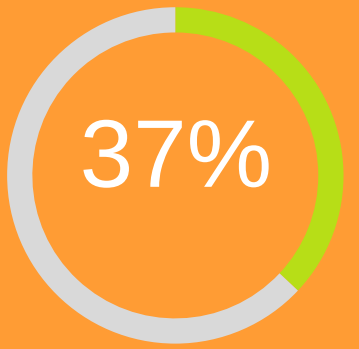
US (-6%)



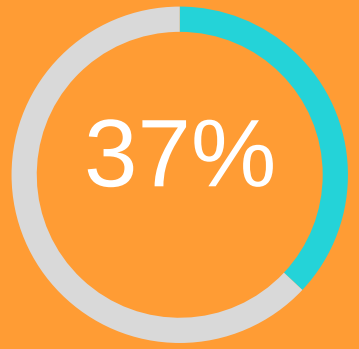
UK (-11%)



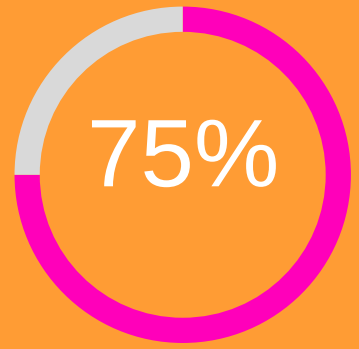
Mexico (-3%)



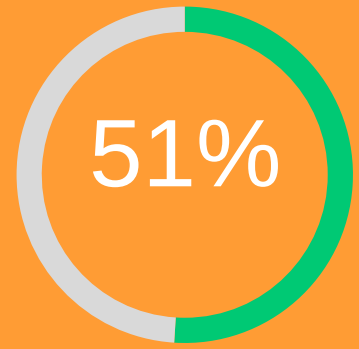
Germany (-8%)



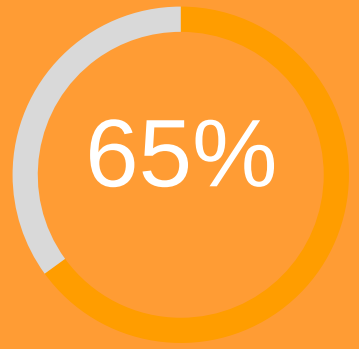
China (~)



Malaysia (~)



Japan (-6%)

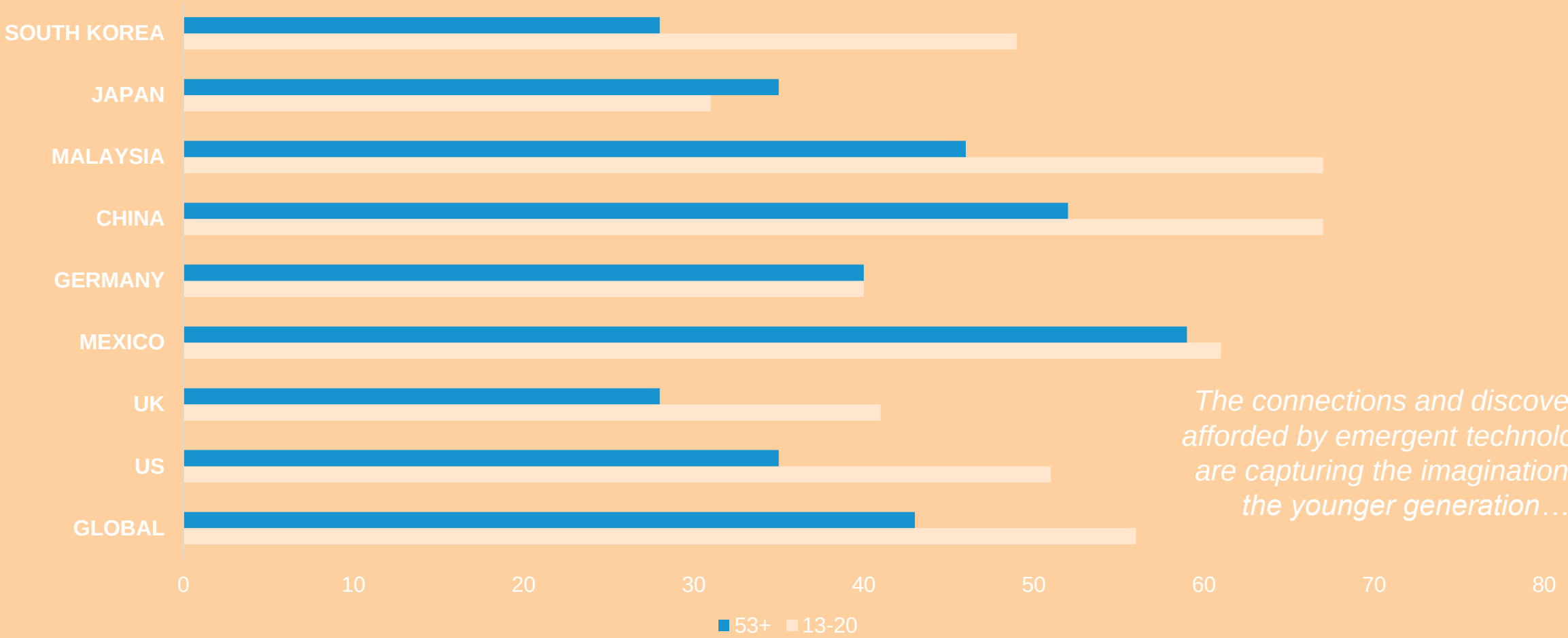


South Korea (~)

(% very/somewhat likely)

COMMUNITY & Identity

"I am always looking for different cultural experiences and influences that will broaden my horizons"



The connections and discoveries afforded by emergent technologies are capturing the imaginations of the younger generation…

(% AGREE)

Consumer LIFESTYLE TRENDS

COMMUNITY & Identity

WHAT'S DRIVING THE TREND?

Multipolar worlds

Slow growth and heightened volatility in developed countries, and booming industries with rising middle classes in developing countries, has shifted the balance of global power.

During 2018, southern and eastern economies are projected to show GDP growth of 4.8% whilst western economies will grow by just 2.1%. Governments are introducing policies to cement this success. China's government have invested $990bn on their 'One Belt, One Road' strategy, which seeks to re-centre regional trade along the Silk Road.

Increasing economic empowerment of women

In the next two decades, an estimated 1 billion women will enter the global workforce. This shift will predominantly be seen in emerging and developing nations, and will significantly alter women's economic and political influence.

Entrepreneurial opportunities are being seized by women, breaking down the historic 'glass ceiling'. In China, 55% of new internet businesses are founded by women.

Rise of Protectionism

There has been a surge of support for political and economic insularity, with rising advocacy for protectionist measures.

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

Nationalist movements have become more dominant, tapping into economic uncertainty, rising terror threats, and a loss of trust in conventional governing bodies to rally support. In the West, populism is at its highest levels since the 1930s.

WHAT'S DRIVING THE TREND?: DRIVERS



Multipolar world

Emerging and Developing markets' GDPs are predicted to grow by 7.4% CAGR form 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

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

IDENTITY SPECTRUMS







HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers…

Global

“The Oxford English Dictionary added the gender-neutral title Mx to the dictionary and a recent petition has launched to require government bodies to use the Mx honorific. We still need to develop a deeper understanding of gender issues that include non-binary identities.

MARTA, STREETSCAPER, LONDON

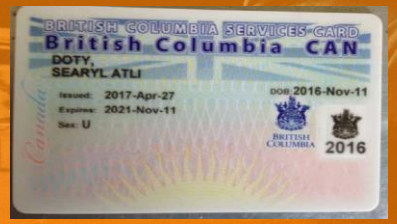
Sweden

Sweden takes gender issues seriously; for several years they have been introducing new legislation and have also launched gender neutral pre-schools. They have been praised as one of the most equal societies in the world.

BBC, 2017

COMMUNITY & Identity

Identity spectrums



2017 saw the first baby receive no legal gender designation, with official documents stating ‘U’, meaning ‘unspecified’ or ‘undefined’.
(CNN, 2017)

12% of Millennials in the US identify as transgender or in some way gender non-conforming
(Accelerating Acceptance, 2017)

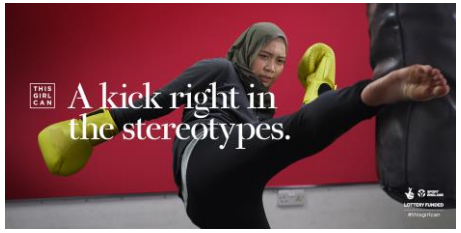


















Global brands challenge perceptions of normal and do away with labels in 2018 comms

McCain chips challenge traditional views of consumers through their adverts investigating ‘What’s normal?’

Smirnoff shouts ‘labels are for bottles, bottles are for people’



Male cosmetics lines in South Korea

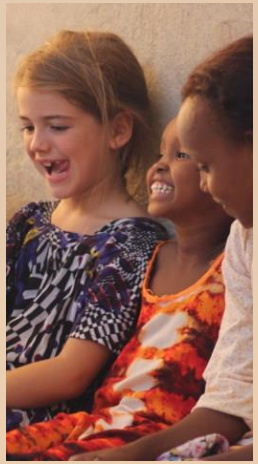
Korean men in their 20s use an average of 13 cosmetic products a month…

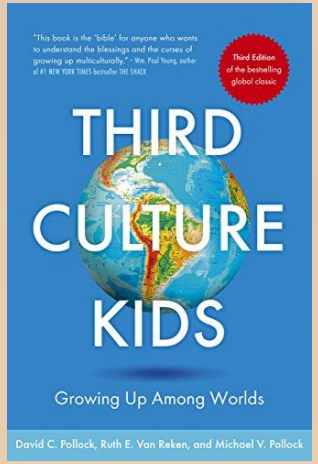
AmorePacific and Skinfood are capitalising on demand, and amongst varied target audiences from urbanites to army personnel

COMMUNITY &
Identity

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

CULTURAL GRAFTING







HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers…

South Africa

There's a generation of young people that have grown up making the cultural commute between urban and township life (peri-urban). Today, that double knowledge is exploding into youth culture, especially through music, art and fashion. They have used their township and urban surroundings to create new sounds, new words, new shapes and new narratives.

MILISUTHANDO, STREETSCAPER, JOHANNESBURG

Lebanon

'Third culture kids' are the key to Beirut's progress and creativity; they are the plugged-in, proactive consumers who do more and demand more. They've been behind almost all the exciting new cultural ventures, incubators and start-ups that have galvanized Beirut's evolution

KASIA, STREETSCAPER, BEIRUT

COMMUNITY & Identity

Cultural grafting

12% of Millennials in the US identify as transgender or in some way gender non-conforming
(Accelerating Acceptance, 2017)



ZAMANIN HUQQA KEYİFLERİ



DIASPORA BLACK



Cultural grafters capture the South African youth population's imagination

Boys of Soweto singing group merge urban styling and sounds with township and rural traditions

THE RACE CARD



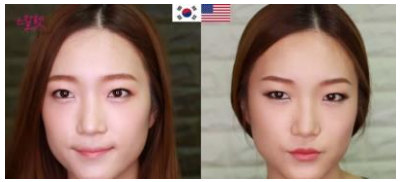
Major markets talking candidly about multiracial realities

Japan - catching onto the rise of previously ostracised mixed race citizens (Hafu), forging their own hybrid cultures

US - The Race Card Project celebrates self-expression from those who represent a mix of ethnicities, rejecting labels







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

CLOSING GENDER GAPS





HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers…

South Korea

South Korea's culture offers women few opportunities to be honest about their experiences with harassment … But initiatives like Blind, an app for anonymous workplace messaging has sparked a wave of #MeToo stories, resonating with South Korean women…

Gagyeong, South Korea

China

Sorority China is the first female-only co-working space in China, providing safe and affordable spaces for both co-working and co-living, aimed at professional women. It offers two locations currently, Shanghai and Beijing.

Rose, China

COMMUNITY &
Identity

Closing Gender Gaps

Women make **85%** of all consumer purchasing decisions globally[1]

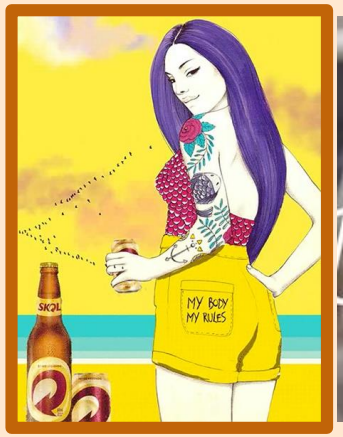














Latin America making strides against sexism and towards equal opportunity

Skol beer confronted their history to challenge a group of female artists to ‘reposter’ for them

Femplea labour bank app advertises services provided by women for women, from plumbing to accounting



The Wing in NYC is a co-working & community space designed for women

Part of a broader women’s club movement sweeping developed markets, The Wing challenges elitism in a major city – but has been criticised for taking new age feminism too far; verging on positive discrimination

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"

COMMUNITY & 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.

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…

South Africa

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…

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

COMMUNITY & *Identity*

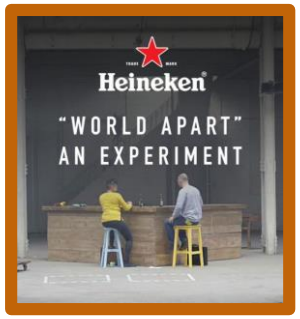
Polarising Politics

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

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



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

