The Thinking House

BORD BIA INSIGHT CENTRE

Keeping it Real
Trend update

Local brands are growing at double the rate of global brands



Local & regional FMCG brands account for **46**% of total FMCG spend in 2015

Local brands can deliver on heightened consumer expectations







Local brands account for 75% of purchase decision in China –
these are the three best performing local brands – Yili, Mengnui and Bright

Consumer Lifestyle Trends

How did we identify the Trends?

1. Top Down

Can we identify global and market drivers that suggest it will continue?



2. Bottom Up

Can we see it manifesting in brand or consumer behaviour?

Consumer Lifestyle Trends

Recap on the critical, global forces of change…



Surge of younger population in emerging markets



More working women



Greater global connectivity and mobile penetration



Mass scale urbanisation

We will see…:



Growth of older population in developed markets



Rise of lifestyle diseases



Growing middle classes



Smaller household sizes and changing family structures

Consumer Lifestyle Trends

How did we identify the trends?





Passport

KANTAR FUTURES

MarketWatch

The Grocer



MONITOR DOWNLOAD

Consumer Lifestyle Trends

How did we identify the Trends?

1. Top Down

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Consumer Lifestyle Trends

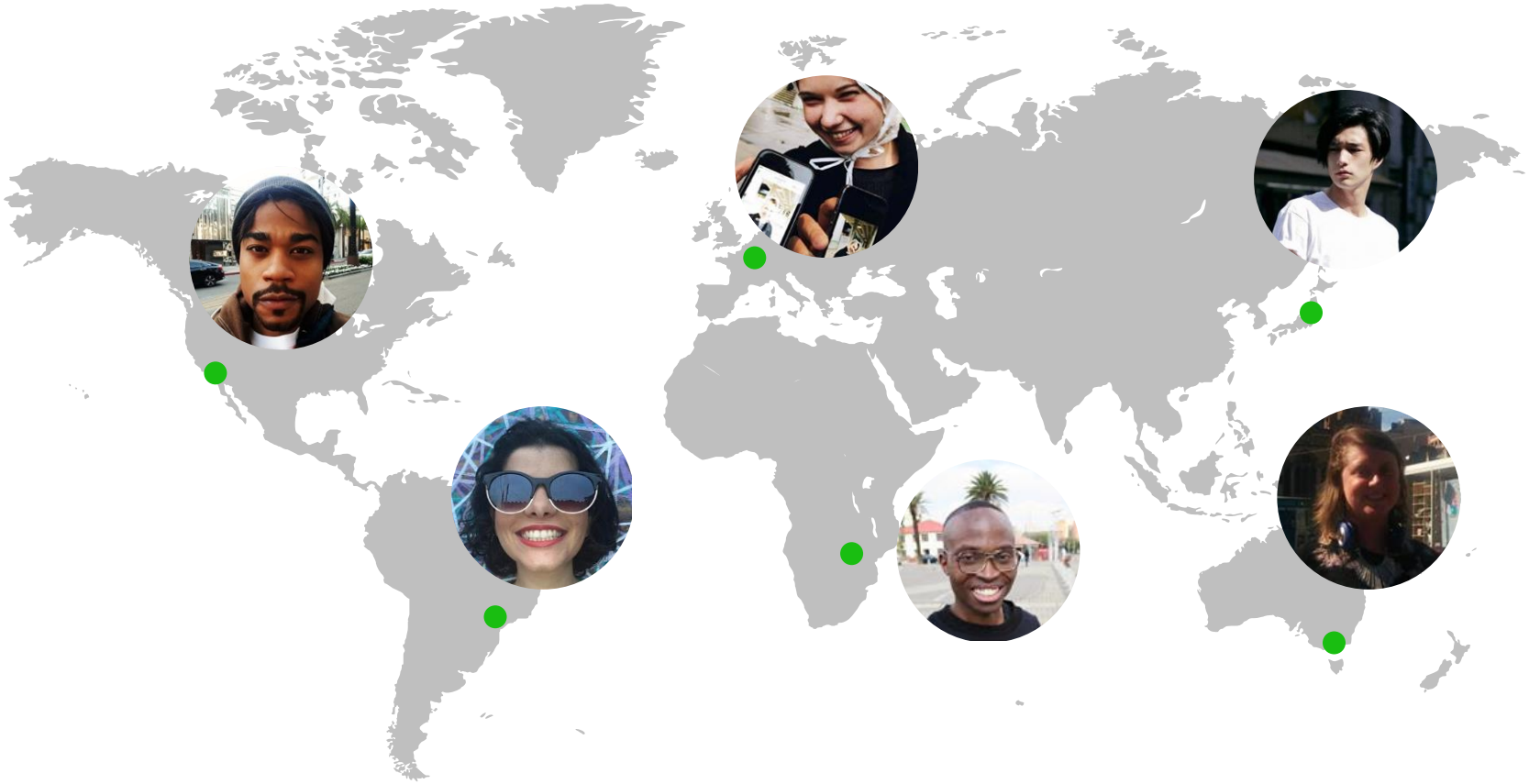
How did we identify the Trends?

21 markets and **28,000 respondents** around the world



Consumer Lifestyle Trends

How did we get here?



Consumer Lifestyle Trends



Busy lives



Shared experiences



Responsible living



Health and wellbeing



Personal value seekers



Keeping it real

Consumer Lifestyle Trends

Health & wellbeing



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

Overview of Health & wellbeing sub-trends



- Proactive prevention
- Essential purity
- Pursuit of happiness *(Creating headspace)* NEW 2017
- Strength in numbers *(Tribal wellbeing)* NEW 2017
- Seamlessly in tune *(Managing the tempo)* NEW 2017
- Personal solutions
- Good start

Health no longer means compromise…

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

Creating Headspace	Pursuit of Happiness
Tribal Wellbeing	Strength in Numbers
Managing the Tempo	Seamlessly in Tune

Key takeaways



PURE & NATURAL PRODUCTS AND PROCESSES WIN



KNOWLEDGE IS POWER FOR CONSUMERS



HEALTHY LIVING = ENJOYMENT AND SOPHISTICATION

Consumer Lifestyle Trends

Keeping it real



"I am looking for products and brands that have real, authentic and honest origins"

Key takeaways



SIMPLE AUTHENCITITY IS KEY FOR CONSUMERS



LEADING BRANDS IMMERSE PEOPLE IN THE STORY



ORIGIN GIVES REASSURANCE OF QUALITY AND SAFETY

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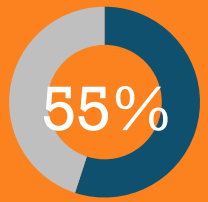
Consumer Lifestyle Trends

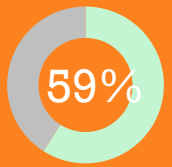
Importance of buying only locally grown or produced goods

(% extremely/very important)

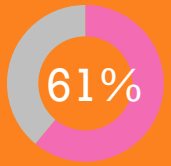




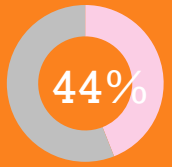
Global Average
+2% since 2013



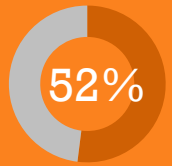
AUSTRALIA



FRANCE



BRAZIL



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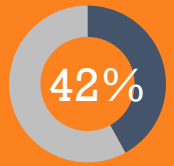

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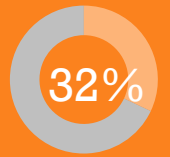

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Irish Food Board

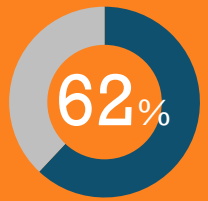
Keeping it real

Consumer Lifestyle Trends

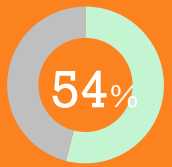
Importance of a brand being completely transparent about all of its business practices when making a buying decision

(% essential/important to have)





Global Average



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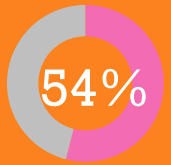

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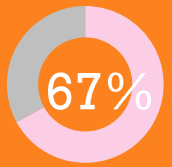

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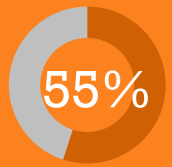

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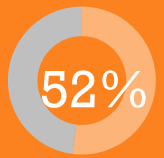

GB

Bord Bia
Irish Food Board

Push towards familiarity, provenance and something that consumers can believe in



- Naturally authentic
- Do it yourself
- Remixing tradition
- Craftsmanship
- Genuine provenance

Consumer Lifestyle Trends

Which have the greatest momentum?



- Do it yourself
- Remixing tradition



- Naturally authentic
- Genuine provenance
- Craftsmanship

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Naturally authentic

Desire for products that are ‘as nature intended’



How Naturally Authentic is evolving?

How it was



A focus on specific elements of natural and authentic, e.g. seasonality

How it is



A hunger for products and experiences that are holistically natural and authentic

How it will be



Bringing natural products into the mainstream to create a new normal in every area of food consumption

Naturally Authentic in action

NEW 2017



Bichi, Mexico's first all-natural, low toxin wine

Mexico

NEW 2017



BlackHawk providing natural products for pets

Australia

NEW 2017



Cia dos Fermentados promoting natural processing

Brazil

Do it yourself

Learning new skills and relying on yourself to achieve satisfaction and save money



How Do It Yourself is evolving?

How it was



Paring back to manage financially, including learning skills from the older generation

How it is



Creativity in finding your own solutions to problems – both a strategy for economising and a leisure pursuit

How it will be

NEW 2017



An essential way to reconnect with lost skills, flex creativity and make new social connections

Do It Yourself in action

NEW 2017



You paint, we pour is a DIY art studio-come-bar

China

NEW 2017



Repair Café creating a fix-it, fix-all meeting place

Netherlands

NEW 2017



Raw Living giving people the tools to grow their own

South Africa

Remixing tradition

Taking the best of tradition and heritage to meet modern tastes



How Remixing Tradition is evolving?

How it was



Reviving traditional products and processes, including those that have fallen out of fashion

How it is



Weaving traditional and contemporary products and processes together to create something new and exciting

How it will be



Tapping into a desire for greater connection to, and pride in, heritage by revisiting forgotten ingredients, products and ideas, giving relevance in a modern context

Remixing Tradition in action

NEW 2017



Kadoyasan Amazake modernising folk wisdom in a nutritious elixir

Japan

NEW 2017



Mei Mei bringing functional tea drinks to the mainstream

Brazil

Craftsmanship

Rising interest in the people and artisan skills behind the product



How Craftsmanship is evolving?

How it was



Bringing the craftsman and their skill to life - for the consumer

How it is



Enabling consumers to actively engage with artisan producers

How it will be



Putting the artisan producers front and centre as the ambassador for the brand

Craftsmanship in action

NEW 2017



Mengokoro Kunimoto focussing on the genius chef behind the ramen

Japan

NEW 2017



Spektal celebrating craftsmanship of a whole country

United Kingdom

Genuine provenance

Provenance becoming the ultimate marker of quality



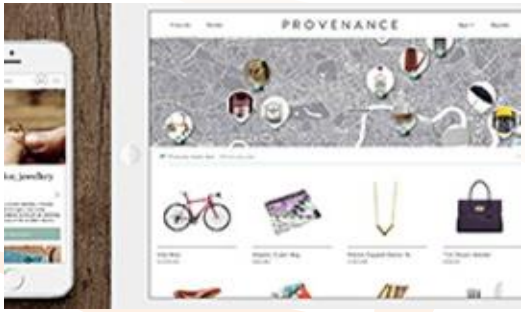
How Genuine Provenance is evolving?

How it was



Curiosity about origins and provenance; provenance stories as a marker of premium

How it is



Provenance a marker of trust as well as quality; desire to engage directly with places where products are made

How it will be



A rise in 'fauxthenticity' demands that brands have a real story that adds value for the consumer and is told consistently

Genuine Provenance in action

NEW 2017



Cocoa Fair celebrating the bean-to-bar journey and their founding ideology

South Africa

NEW 2017



Umá inviting the consumer to celebrate its 100% natural product through social media

France

NEW 2017



Queen Victoria Market Greenhouse Project creating a new provenance story

Australia

Push towards familiarity, provenance and something that consumers can believe in



- Naturally authentic
- Do it yourself
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- Genuine provenance

Consumer Lifestyle Trends

Thought-starters: How could you..?

Next level

Facilitate consumer engagement with the people and places behind your products? Could your consumer play a part in creation?



Tell more emotionally engaging stories about your products and their origins that are relevant to the consumer?

Consumer Lifestyle Trends

Thought-starters: How could you..?

Next level

Emphasise the high quality craftsmanship and traditional aspects of your products?



Own - or be the ‘go to’ for - your area of expertise? How could you take this beyond your everyday consumers?

Consumer Lifestyle Trends

Thought-starters: How could you..?

Next level

Ensure products are as nature intended – leaving out the un-natural, or including provenance or seasonality?



Completely re-think your core in the context of 'natural' and apply some of those learnings to new ranges?

Consumer Lifestyle Trends

Our Trends calendar for 2017



Health and wellbeing



Keeping it real



Responsible living



Busy lives



Personal value seekers



Shared experiences



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