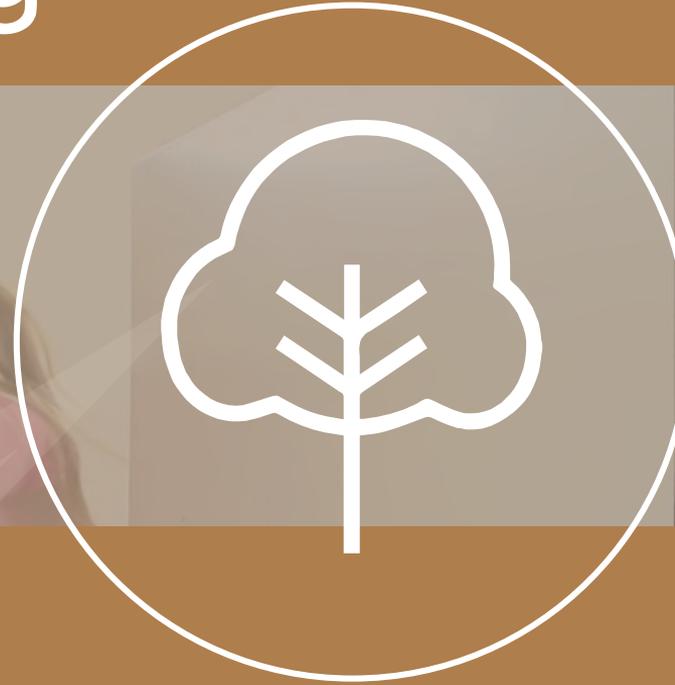


Responsible living



“I want to live more responsibly and make better choices that make a difference, without having to compromise”



What's happening right now!



**SOCIAL NETWORKS
UNITE PEOPLE
AROUND SHARED
CAUSES**



**NET POSITIVE
BRANDS AND
BUSINESSES WIN**



**WASTE ACROSS THE
VALUE CHAIN IS
SERIOUS BUSINESS**

The Gardener of the Future



Aspiring and Novice gardeners are even **more attuned to their environmental responsibilities.**

Composting is expected, rainwater harvesting an obvious choice and local sourcing and native planting and consideration for bees as well as companion planting for natural pest control.

Eco



Natural Killers to Protect Pollinators

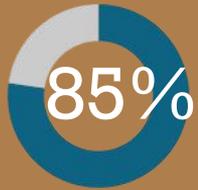


NOW
 LATER



“It is important in my life today to support my local community”

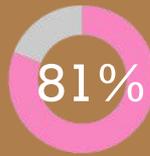
(% extremely/very/somewhat important)



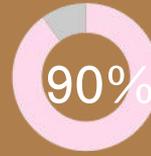
Global Average
+2% since 2014



AUSTRALIA



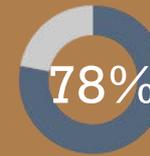
FRANCE



BRAZIL



USA



JAPAN

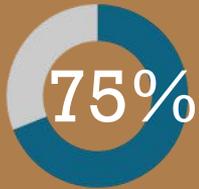


GB



“I’d like to do the right thing, but the fact that it’s overwhelming and complicated to figure out the most effective things to do is holding me back from leading a more environmentally conscious lifestyle”

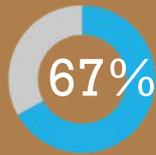
(% great deal/somewhat)



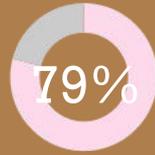
Global Average
+3% since 2015



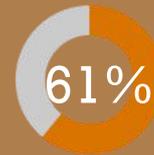
AUSTRALIA



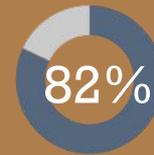
FRANCE



BRAZIL



USA



JAPAN



GB



1 in 4 Irish consumers agree that they are more conscious in their choice of products and prefer to buy from companies that are aware of environmental issues.

Just over a half of adults in ROI and GB are aware of the term “sustainably produced”.

2/3s of Irish consumers consider buying local is important compared to just over half in the UK.

70% of Irish consumers like to know where food comes from.





Overview of sub-trends



Local action

Working together to have local impact

Conserving resources

Living in a world where resources are in short supply

War on waste

Reducing the wasteful byproducts of consumption

Good citizenship

Working to protect and care for causes, groups and people that are most in need

Fair Treatment

Treating animals and people fairly throughout the production process

Totally transparent

Expectation of complete honesty





How have the sub-trends evolved?



People are increasingly relying on themselves and their communities to instigate positive change, recognising their power in changing the world around them; with this in mind we see **one shift in the sub-trends:**

More Niche Concerns



Good Citizenship



Heating up
Still warm
Cooling



Local action

Working together to have local impact

War on waste

Reducing the wasteful byproducts of consumption

Good citizenship

Working to protect and care for causes, groups and people that are most in need



Heating up
Still warm
Cooling



Conserving resources

Living in a world where resources are in short supply

Fair treatment

Treating animals and people fairly throughout the production process

Totally transparent

Expectation of complete honesty



Local action

Working together to have local
impact





How is this sub-trend evolving?



How it was



A reliance on businesses and local authorities to instigate change for the better

How it is



Collective community endeavours by proactive and like-minded individuals

How it will be



Brands facilitating the consumer desire to 'do good': Making it easy to do good on your doorstep



New in-market examples from around the world



NEW
2017



Dos Anjos investing in social projects, and letting people get involved through **Angels Club**



Brazil

NEW
2017



Bertrams Inner City Farm bringing employment and produce to high poverty regions



South Africa

NEW
2017



Freegan Pony inviting the community to cook together with surplus ingredients from a local market and eat for free



France



Conserving resources

Living in a world where resources
are in short supply





How is this sub-trend evolving?



How it was



Mainstreaming of the desire to save resources

How it is



Increasingly high expectations of sophisticated solutions for conserving resources

How it will be



Demand for businesses to combine sophisticated solutions for conservation with smarter manufacturing ideas



New in-market examples from around the world



Consumer Lifestyle Trends

NEW
2017



Ethical Bean Coffee with 100% compostable pods



Canada

NEW
2017



Vega using pea protein as a sustainable source of the nutrient



Canada

NEW
2017



Smith and Daughters vegan fine dining promoting use of sustainable produce in high-end cuisine



Australia



War on waste

Reducing the wasteful byproducts
of consumption





How is this sub-trend evolving?



How it was



Growing consumer desire for low-waste products that can be easily repurposed or recycled

How it is



Increasing social unacceptability of waste at all levels; particular focus on food waste

How it will be



The war on waste becomes more social



New in-market examples from around the world



NEW
2017



Wasty app showing people how to make-over leftovers into new meals



Australia

NEW
2017



Farmsquare app exchange of fruit and veg from urban gardens



Brazil

NEW
2017



Pur, Etc. encouraging patrons to organise their own waste after dining



France



Good citizenship

Working to protect and care for causes, groups and people that are most in need

Formerly MORE NICHE CONCERNS





How is this sub-trend evolving?



Consumer Lifestyle Trends

How it was



Mainstreaming of low impact solutions that protect the environment and biodiversity.

How it is



More niche issues on the consumer radar which brands need to safeguard.

How it will be



Brands required to act as 'good citizens' and take action outside their immediate sphere to address consumer concerns.



New in-market examples from around the world



NEW
2017



ASRC Food Justice Truck providing discounted produce to asylum seekers, and re-investing profit in the programme



Australia

NEW
2017



Les Justes enabling people to do good through an everyday activities



France

NEW
2017



GoodGym bringing together personal fitness with community service



United Kingdom



Fair treatment

Treating animals and people fairly throughout the production process





How is this sub-trend evolving?



How it was



Mainstreaming of fair treatment practices, with Fairtrade increasingly becoming the default choice.

How it is



Growing desire for assurance that fair practices cover the whole supply chain.

How it will be



Multiple options in any category allow consumers to make 'fair treatment' a key filter for choice.



New in-market examples from around the world

Consumer Lifestyle Trends



NEW 2017



B-Corp bringing a gold standard of integrity to businesses across categories:

- 1600 companies**
- 42 countries**
- 120 industries**



Global

NEW 2017



Sadia Seara's platform, Hoje tem Frango, showing people the truth about their chickens



Brazil

NEW 2017



Starbucks' commitment to hire 10,000 refugees over the next five years



Global



FEED

BE BETTER

HOME WHO WE ARE WHAT WE MAKE LUNCH WITH A CONSCIENCE FIND US SOCIAL



LUNCH WITH A CONSCIENCE

We work with Mary's Meals to provide a meal for some of the world's hungriest children in 12 different developing nations. For every pot sold we donate one school meal to a child in the developing world. Today [Mary's Meals](#) feeds over 1.1 million children in schools across the world and with your help we can help eradicate food poverty from this world of plenty.





Total transparency

Expectation of complete honesty





How is this sub-trend evolving?



Consumer Lifestyle Trends

How it was

How it is

How it will be



Appreciation of efforts to show consumers what's going on behind the scenes.

Expectation that brands are 100% transparent in all that they do.

Acknowledgement of mistakes and appreciation for the humility of brands being 'just like us' - as long as there is a desire and plan to improve.



New in-market examples from around the world



NEW
2017



Fuchu Prison Culture Day helping people understand prisoners in an effort to improve quality of prisons



Japan

NEW
2017



McDonald's acknowledging rumours about its ingredients and revamping its McNuggets recipe in a candid, access-all-areas video



Canada

NEW
2017



Mars Inc. requesting fast food chains stop using their candies



Global



Thought-starters: How could you..?



Next level

Ensure your consumer is completely aware of what happens at every stage of your supply chain?



Highlight, or rethink, the value your brand brings behind the scenes?

Thought-starters: How could you..?



Next level

Add to the environmental/ethical benefits of your products? Would a partnership better enable this?



Support causes beyond donating money? What positive impact could your brand make that no other could?



Thought-starters: How could you..?



Next level

Help each individual consumer live responsibly on a day to day basis through changes to product and packaging?



Rethink production processes to become more sustainable? What value can you extract from waste products?

Keeping it real



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



**SIMPLE
AUTHENTICITY IS KEY
FOR CONSUMERS**



**LEADING BRANDS
IMMERSE PEOPLE IN
THE STORY**

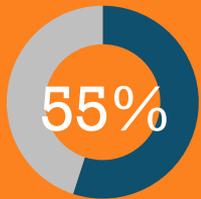


**ORIGIN GIVES
REASSURANCE OF
QUALITY AND SAFETY**



Importance of buying only locally grown or produced goods

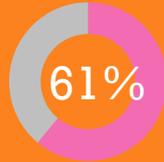
(% extremely/very important)



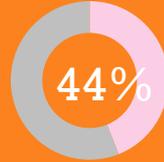
Global Average
+2% since 2013



AUSTRALIA



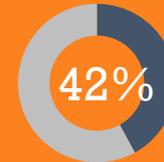
FRANCE



BRAZIL



USA



JAPAN

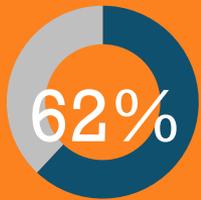


GB

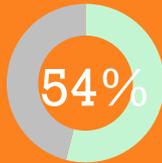


Importance of a brand being completely transparent about all of its business practices when making a buying decision

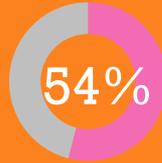
(% essential/important to have)



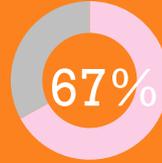
Global Average



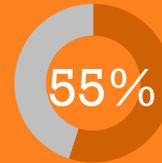
AUSTRALIA



FRANCE



BRAZIL



USA



JAPAN



GB



Naturally authentic

Desire for products that are 'as nature intended'

Do it yourself

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

Remixing tradition

Taking the best of tradition and heritage to meet modern tastes

Craftsmanship

Rising interest in the people and artisan skills behind the product

Genuine provenance

Provenance becoming the ultimate marker of quality



Heating up
Still warm
Cooling



Do it yourself

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

Remixing tradition

Taking the best of tradition and heritage to meet modern tastes

Heating up
Still warm
Cooling



Naturally authentic

Desire for products that are 'as nature intended'

Genuine provenance

Provenance becoming the ultimate marker of quality

Craftsmanship

Rising interest in the people and artisan skills behind the product



Naturally authentic

Desire for products that are 'as
nature intended'





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

Tom Hunt

How it will be



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

Aussie Farmers Direct & WeightWatchers



New in-market examples from around the world



Consumer Lifestyle Trends

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



The Gardener of the Future

GYO



A lot of interest in **growing your own vegetables, herbs, fruit** – especially among the younger people we talked to.



A vegetable patch or area is the most popular planned feature to have in a garden in the next 3 years (19%).



This is higher amongst 25-34 year olds (25%)



70% say that growing fruit/vegetables that they could eat would encourage them to garden more.,.,.,





How is this sub-trend 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



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



New in-market examples from around the world



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



About **300,000** adults in
Ireland **grow vegetables**
regularly at home





Over **4 in 10** adults **express an interest** in GYO.... That's a whopping **1.4 million** people.

Interest peaks at **35-44 years** old.





One out of every three regular gardeners have a **vegetable patch** set aside.





About **964,267** regular
gardeners in Ireland sow or plant
herbs in their garden.





Remixing tradition

Taking the best of tradition and
heritage to meet modern tastes





How it was



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

How it is



The Blenheim Forge: Weaving traditional and contemporary products and processes (metalwork and blacksmithing) 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



Consumer
Lifestyle Trends

The Waterford Bla



DUBAI 5961km



Photo:
Patrick Browne,
Irish Independent

1 Q

The Waterford blaa has spread its wings, and can now be found on the menus of the 5-star Pennington Jumeirah Lakes Towers in Dubai. Pictured: M&D Bakery's Michael and Dermot Walsh



BabyLyonstoren looking to the past for inspiration in products and processes





Craftsmanship

Rising interest in the people and artisan skills behind the product





How is this sub-trend evolving?



Consumer Lifestyle Trends

How it was



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

How it is



Michigan Farmers: Meet the Makers:
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



Consumer
Lifestyle Trends

Spektal: 100% British



SPEKTAL.



Spektal is a brand
based on craftsmanship
& authenticity
Made in England





Genuine provenance

Provenance becoming the ultimate
marker of quality





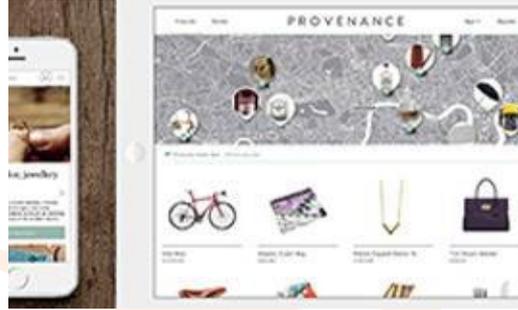
How it was



Gaucho Argentinian Steakhouse.

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



Queen Victoria Greenhouse project



Creating the longest inner city Greenhouse in the world
Melbourne

Thought-starters: How could you..?



What is your “nature intended” story: how can play to provenance or seasonality?

Next level

Completely re-think your core in the context of ‘natural’ and apply some of those learnings to growing produce, etc



Consumer
Lifestyle Trends

Thought-starters: How could you..?



**Celebrate high
quality
craftsmanship**

Next level

**Own - or be the 'go to'
for - your area of
expertise? Or create
a shared event..**



How do you play to tradition

Next level

What processes or methods are you using that celebrate heritage and our past..

Thought-starters: How could you..?



How can you tap into the “do it yourself” zeitgeist

Next level

How can you get your customers involved, how can you empower them?



Consumer
Lifestyle Trends

Health & wellbeing



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



Key takeaways



Consumer Lifestyle Trends



PURE & NATURAL PRODUCTS AND PROCESSES WIN



CASHEWS
PER 1/4 CUP

314
CALORIES
25G
FAT
17.1G
CARBS
10.3G
PROTEIN



AVOCADO
PER 3/4 AVOCADO

241

KNOWLEDGE IS POWER FOR CONSUMERS

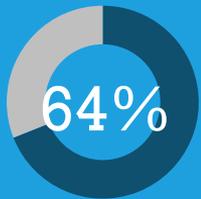


HEALTHY LIVING = ENJOYMENT AND SOPHISTICATION

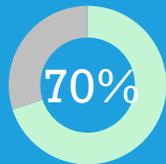


“I actively take steps to look after my health regardless of whether I feel ill or not”

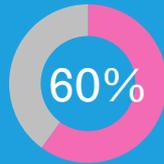
(% strongly agree)



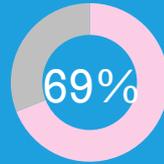
Global Average
+12% since 2013



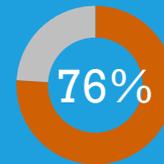
AUSTRALIA



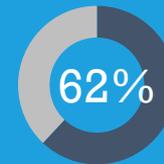
FRANCE



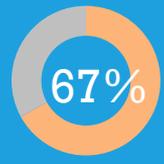
BRAZIL



USA



JAPAN

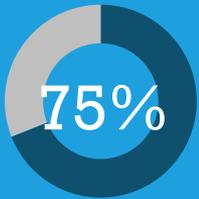


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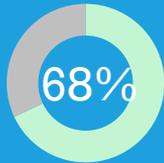


“I eat, drink or take functional foods to improve my wellbeing”

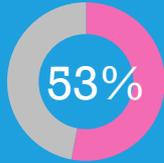
(% regularly/occasionally)



Global Average
+2% since 2015



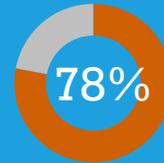
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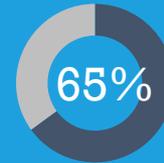
FRANCE



BRAZIL



USA



JAPAN



GB



Proactive prevention

Proactively defending the body against future disease and illness

Essential purity

Desire for raw, natural and clean

Pursuit of happiness

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

Strength in numbers

weight training and protein rich diets are gaining mass appeal and status

Seamlessly in tune

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

Personal solutions

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

Good start

Ensuring children get the best start in life





How have the sub-trends evolved?



Healthy **no longer means compromise** and these choices often represent the more enlightened approach to diet and lifestyle; 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



How dynamic are each of the sub-trends?



Heating up
Still warm
Cooling



Seamlessly in tune

Pursuit of happiness

Strength in numbers

Heating up
Still warm
Cooling



Proactive prevention

Personal solutions

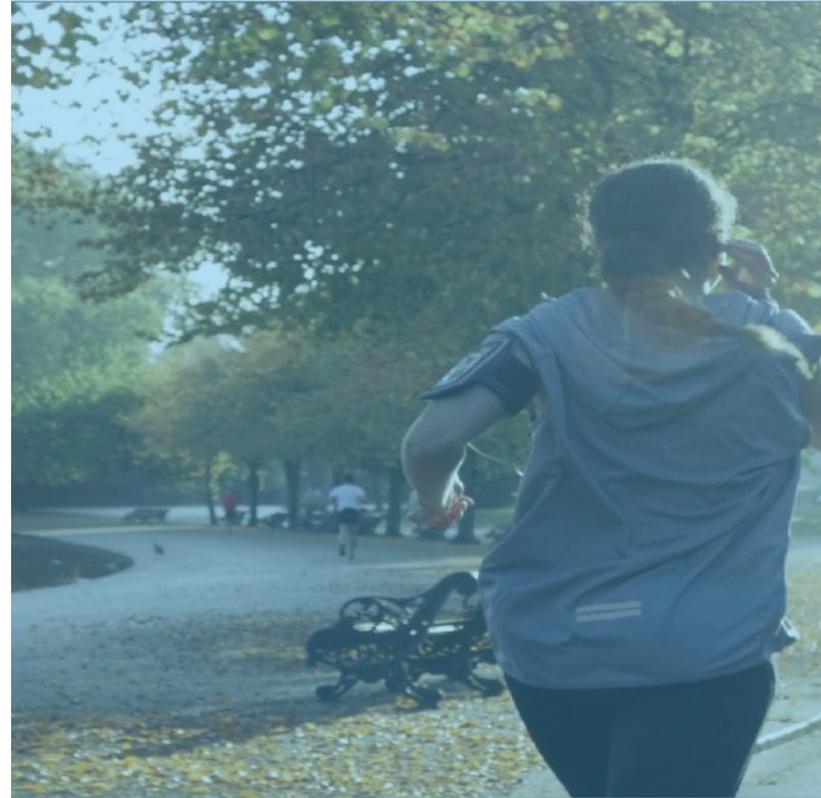
Good start

Essential purity



Proactive prevention

Proactively defending the body against future disease and illness





How is this sub-trend evolving?



How it was



A desire for routine and targeted solutions, with tangible benefits

How it is



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

How it will be



Technology being used to enhance the goodness of nature and boost the defences of the body- extracting and preserving the phyto-nutrients using breakthrough centrifuge technology



New in-market examples from around the world



KeVita flavoured, sparkling probiotic drink



USA



Organic Burst Baobab Joy prebiotic supplement powder



South Africa



Alflorex Precision Biotics



Ireland

Medicinal Gardening



NOW
 LATER

Indoor gardening for food, aesthetics and wellness....

Lighting, Hydro systems etc

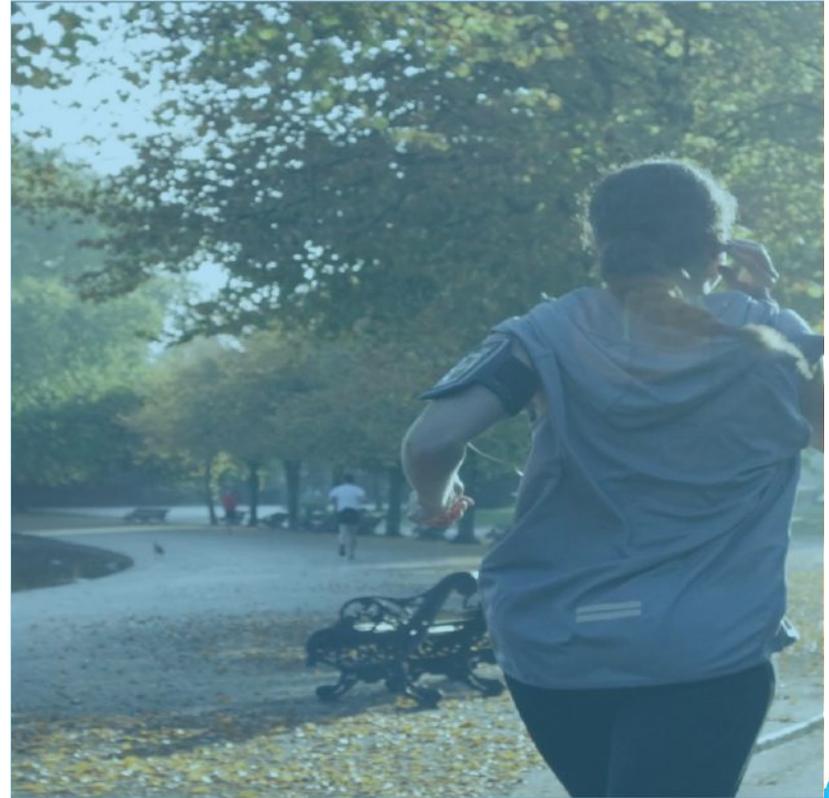


NOW
 LATER



Essential purity

Desire for raw, natural and clean





How is this sub-trend evolving?



How it was



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

How it is



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

How it will be



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



New in-market examples from around the world



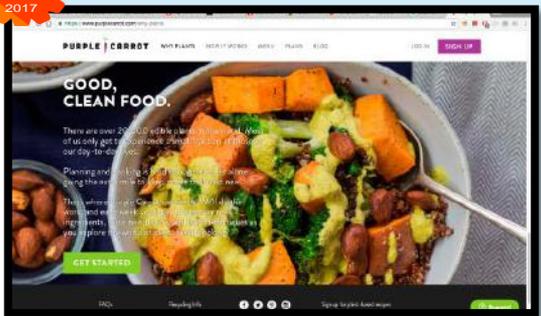
NEW 2017



JuicePress 1-5 day 'Eat Clean' exciting plan
Truffle green protein
Egyptian red lentil ravioli



NEW 2017



Purple Carrot vegan and organic delivery service



NEW 2017



Gloops quick innovation to meet Brazilian government guidelines





Naturalism & Sensitive Gardening

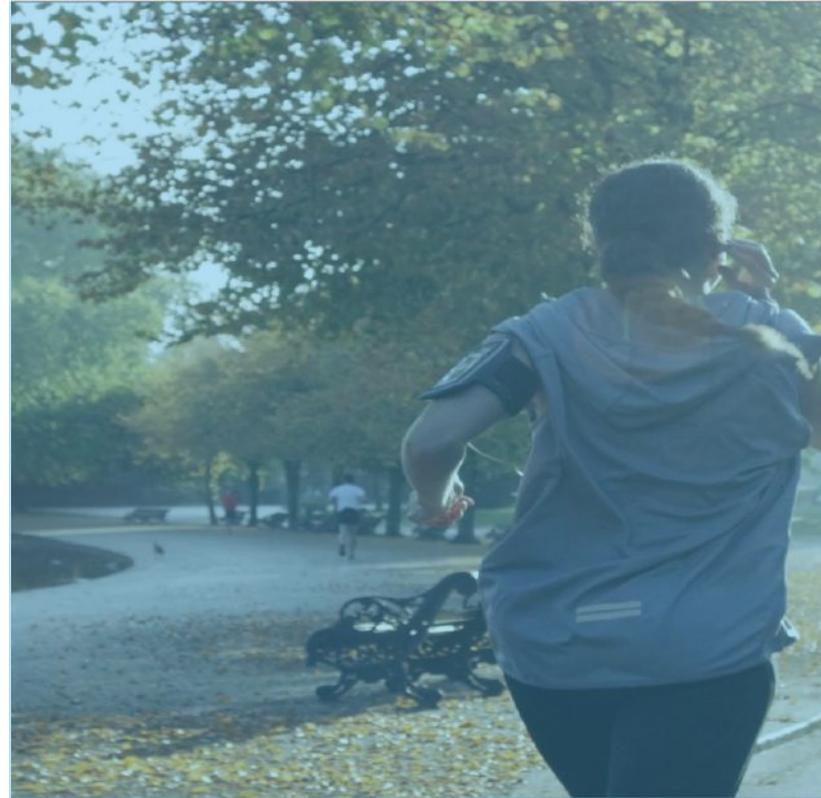
NOW
 LATER



Pursuit of happiness

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

Formerly **CREATING HEADSPACE**





How is this sub-trend evolving?



How it was



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

How it is



Helping consumers find and experience mental downtime

How it will be



Healthy choices are about adventure, choice and freedom such as that offered by the Serotonin Eatery



New in-market examples from around the world



NEW 2017



Parusha's Plant Based Paradise vegan pop-up events



South Africa

NEW 2017



The Robin Collective health food tricks and treats



United Kingdom

NEW 2017



EatChaCha "feeding a positive attitude" with different menus daily



Switzerland



Forest bathing & Flora Tourism

NOW
 LATER



For Gardeners, their time spent in the garden is a “zen-like” experience.

When I'm out there it's very relaxing and therapeutic. I go into my own world
(Male, over 40, Dublin)



75% of adults believe that gardening is good for your **mental health....**

98% of adults who garden regularly know that it is





80% of adults
feel their
garden or
outdoor space
is a haven for
**relaxing and
unwinding....**



96% of regular
gardeners view
it as such....





63% of adults feel that
it is good for staying
fit and active





...and despite **3 in 4**
regular gardeners
considering
digging a "pain",

95% credit gardening
with keeping
them fit and active.

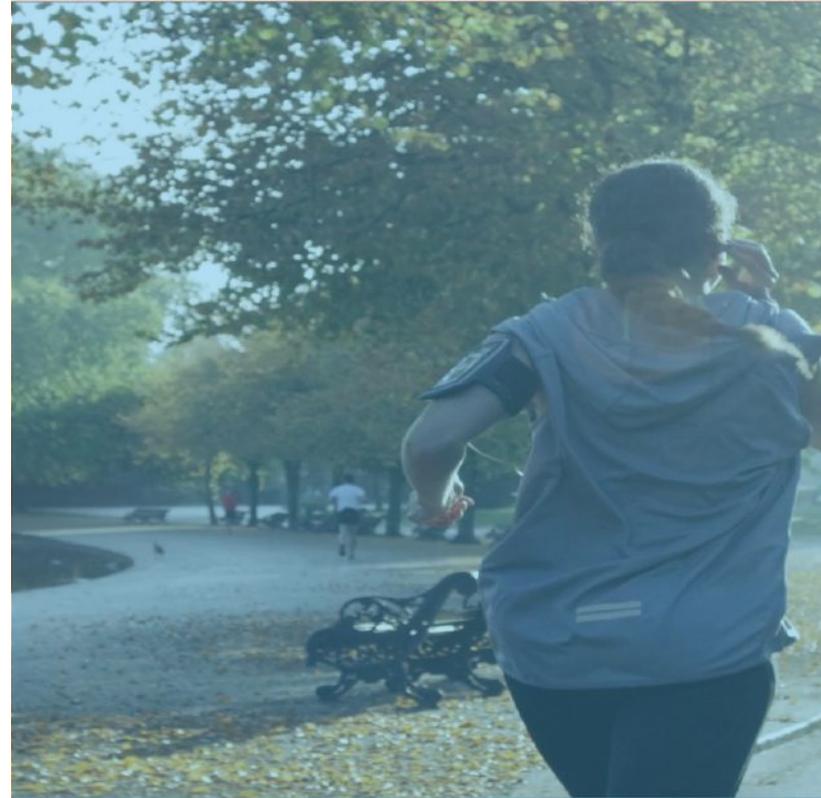




Strength in numbers

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

Formerly TRIBAL WELLBEING





How it was



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

How it is



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

How it will be



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



New in-market examples from around the world



NEW 2017



Purpose.com Foodstand social health app



Australia

NEW 2017

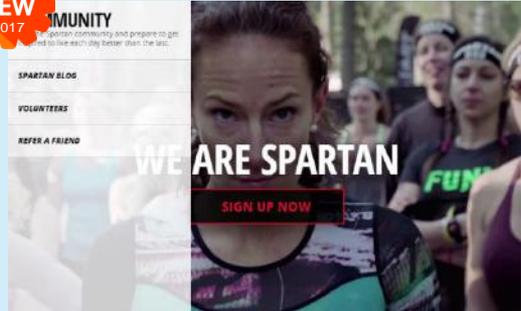


Kayla Itsines building global health & fitness communities



USA

NEW 2017



Reebok Spartan Team Obstacle Course Challenges



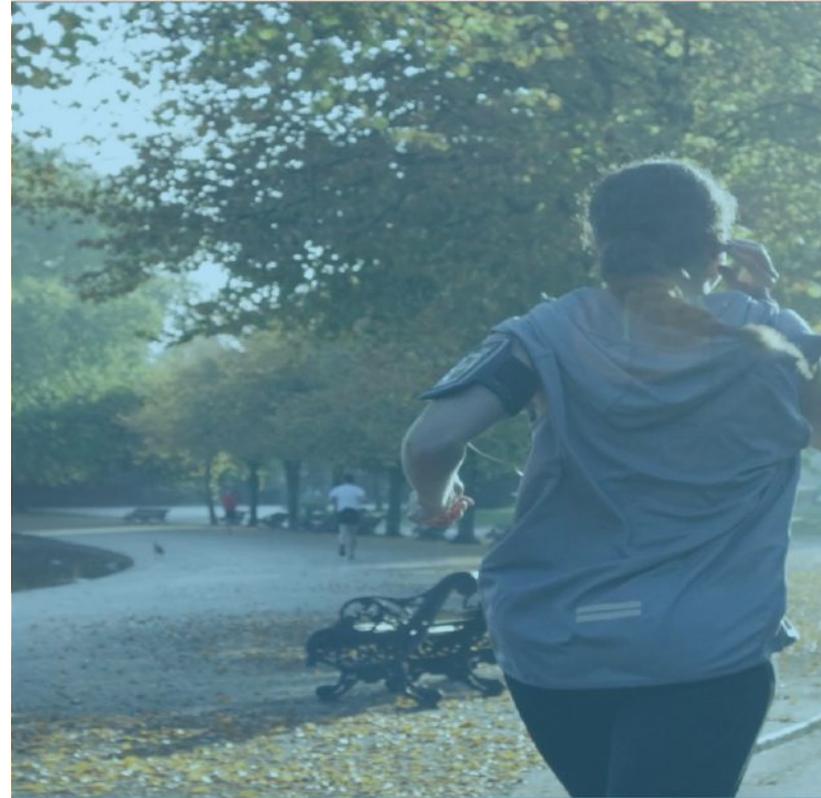
United Kingdom



Seamlessly in tune

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

Formerly **MANAGING THE TEMPO**





How is this sub-trend evolving?



How it was



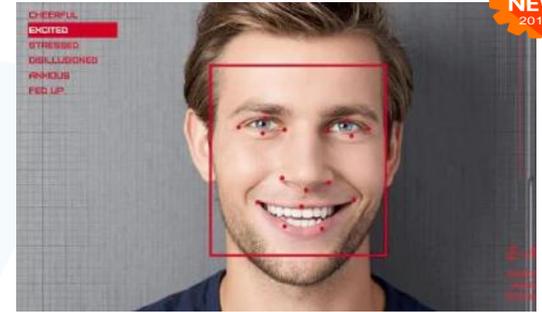
Energy solutions that feel natural, not synthetic

How it is



Sophisticated and exciting energy management through understanding food and drink combinations like Medibank

How it will be



Real-time reactive products that work your body needs at specific times of the day, year and in certain situations: Just Eat Mood Mapping App



New in-market examples from around the world

Consumer Lifestyle Trends



NEW 2017



B.eat time-tailored snacking in Brazil



Brazil

NEW 2017



Sleep Number 360 personalised mattress-tech for optimal sleep



USA

NEW 2017



Fabulous award-winning healthy habit builder

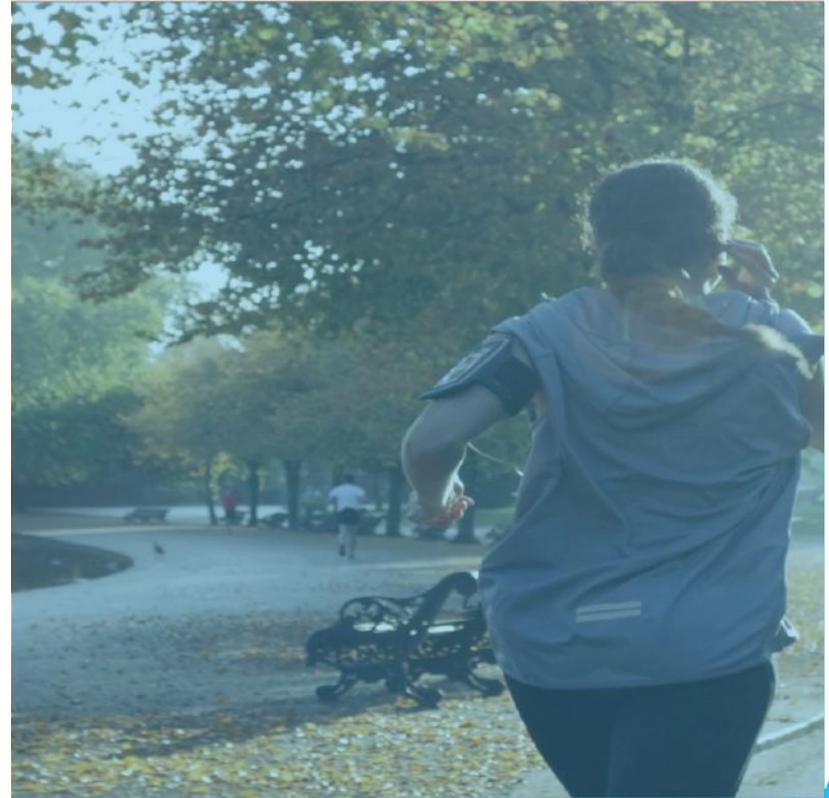


USA



Personal solutions

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





How is this sub-trend evolving?



How it was



Personalised diets based on allergies and intolerances

How it is



Holistic, personalised and often tech-enabled plans

How it will be



Solutions that are tied to the unique DNA of your body: DNAFit



New in-market examples from around the world



Consumer Lifestyle Trends

NEW 2017



Jawbone and Munchery tracking your take-away nutritional information using their UP App



USA

NEW 2017

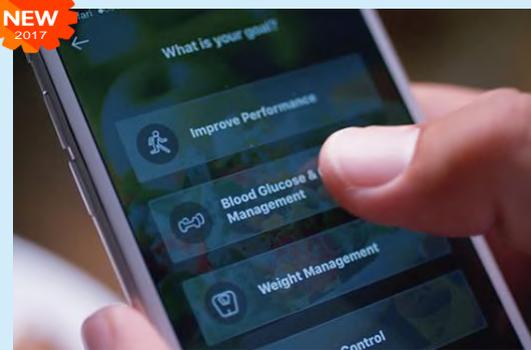


Tossed digital salad customisation



United Kingdom

NEW 2017



Smartplate Topview personal health suggestions thanks to Artificial Intelligence

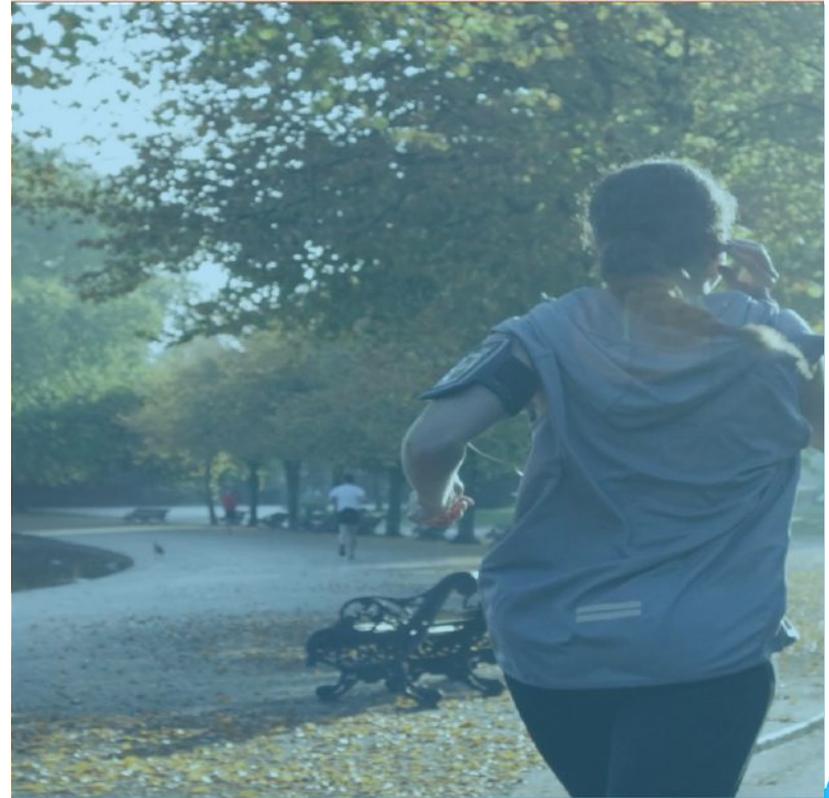


USA



Good start

Ensuring children get the best start
in life





How is this sub-trend evolving?



How it was



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

[Petite Palate:]

How it is



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

“Great British Chefs: Cooking with Kids”

How it will be



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



Next level

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



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



Next level

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





Next level

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



Act more like a lifestyle brand - build on consumers “cultural currency” around Health and Wellbeing..

Busy lives



“I want help managing and making the most of the time I have”

The Gardener of the Future



Simpler



Having a garden which is **easy to maintain** is becoming more popular and more important.



44% say that **time** holds them back from gardening. Higher amongst 25-34 year olds (63%) and Young & Free (71%)



Finally, if it **was low or no maintenance** it would encourage 75% of people to garden more and this is higher among younger demographics





**THE RIGHT PLACE &
THE RIGHT TIME ARE
ALGORITHMICALLY
DETERMINED**



**NEW ROUTES TO
CONSUMER SPRING
UP WITHIN HYBRID
SPACES**

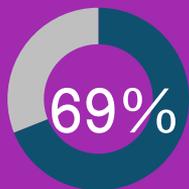


**CONSUMERS SEEK
SEAMLESS, SIMPLE
SOLUTIONS**

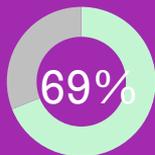


“More and more, I find I am looking for ways to simplify my life”

(% agree strongly/slightly)



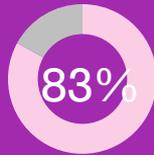
Global Average
+3% since 2014



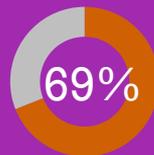
AUSTRALIA



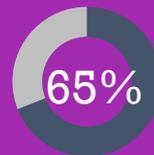
FRANCE



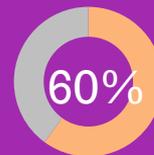
BRAZIL



USA



JAPAN

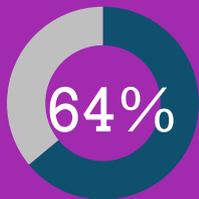


GB

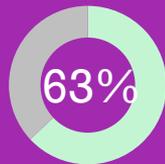


“It is important for me to sometimes disconnect from online and mobile communications”

(% agree strongly/slightly)



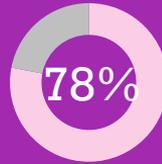
Global Average
+7% since 2014



AUSTRALIA



FRANCE



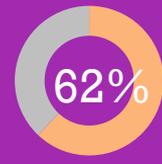
BRAZIL



USA



JAPAN



GB



Right thing, right there

Having the right thing when and where you want it

Simplexity

Products that make everyday living more simple

Pre-empting problems

Leaning on lifestyle services that pre-empt problems and outsource tasks

Life in flux

The boundaries between work and leisure, on and off, day and night are blurring with the norm constantly challenged

Functionality with personality

An expectation and capability to add greater personalisation and fun when dealing with daily demands of busy lives





How have the sub-trends evolved?



As technology improves and increasingly provides a seamless consumer experience expectations of this experience across the board rise; with this in mind we see **two shifts in the sub-trends:**

Change in Routines



Life in Flux

Functionality with Personality



Heating up
Still warm
Cooling



Pre-empting problems

Leaning on lifestyle services that pre-empt problems and outsource tasks

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The boundaries between work and leisure, on and off, day and night are blurring with the norm constantly challenged



Functionality with personality

An expectation and capability to add greater personalisation and fun when dealing with daily demands of busy lives



Heating up
Still warm
Cooling



Right thing, right there

Having the right thing when and where you want it

Simplexity

Products that make everyday living more simple



Right thing, right there

Having the right thing when and
where you want it

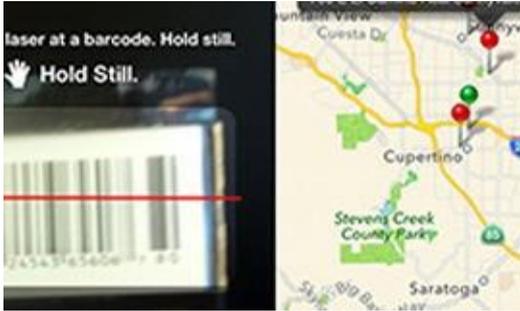




How is this sub-trend evolving?

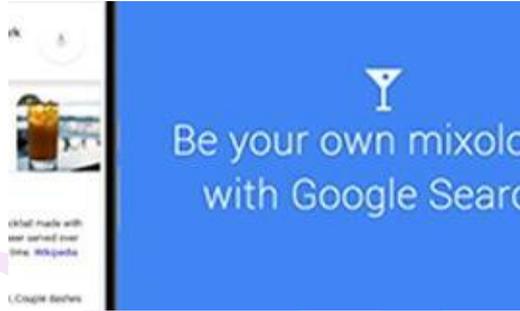


How it was



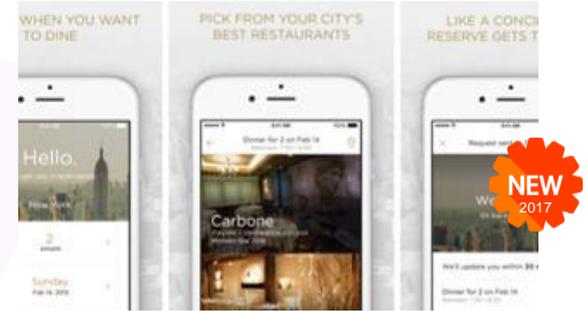
Improvements in convenience and portability, increased use of GPS to find what you need when you want it

How it is



Products that are specifically designed for life on the move, available wherever the consumer is, whenever they want it

How it will be



As technology-enabled intermediary solutions raise standards and expectations, people demand high end convenience and personalised service without sacrifice for eg The Reserve App, NYC.



New in-market examples from around the world



Consumer Lifestyle Trends

NEW 2017

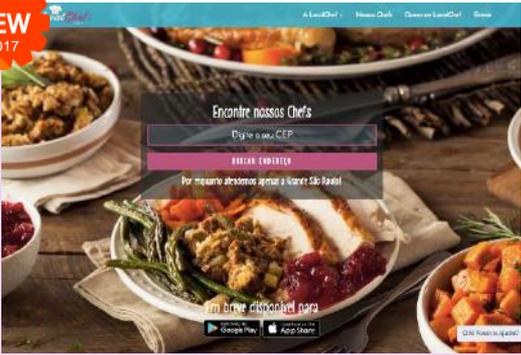


Shizenshoku F&F, a supermarket selling organic foods from all regions of Japan, conveniently in a train station



Japan

NEW 2017



Local Chef, online food service delivering fresh, homemade food from local members of the community



Brazil

NEW 2017



Food delivery service **Foodora** has partnered with a tech agency to deliver meals by drone



Australia

UBERISATION

Garden Surprises to your door.....

NOW
 LATER



Simplexity

Products that make everyday living
more simple





Busy lives are a key barrier to Gardening

45% of adults say that gardening is just too much hassle

Among Gardeners, **time is the third biggest barrier to Gardening**

Every year I get fresh hanging baskets done up. It makes the garden look summery and pretty but it doesn't require too much effort after they're up. I just don't have time for that.
(Female, 30, Cork, Young Family)





75% of gardeners say they would be encouraged to do more if it was **low or no maintenance**



This rises to **86%** among Potential Gardeners, the most likely thing to encourage them to Garden





How is this sub-trend evolving?



How it was



Easy solutions and innovative formats that conveniently meet simple needs

How it is

Multi-purpose smart sensors



Simple messages and user interfaces that help consumers meet complex needs..

Take Mother: Monitoring House Hold Tasks

How it will be



Bringing together multiple services into one convenient integrated service..

Foodiful.. A pinterest for recipes!..the tried and tested!



New in-market examples from around the world



NEW
2017



KFC, teaming up with Baidu use facial recognition technology to predict customer's orders and give recommendations



China

NEW
2017



Uobei Sushi parlour in Japan has replaced their traditional conveyor belt with a faster bullet train



Japan

NEW
2017



UCook, a delivery service that makes simple restaurant-quality global exploration through an educational food box delivery



South Africa



Pre-empting problems

Leaning on lifestyle services that
pre-empt problems and outsource
tasks





How is this sub-trend evolving?



How it was



Guidance in decision making through choice simplification and personalisation

How it is



Presentation of a tailored range of solutions before a consumer is even aware a decision needs to be made

How it will be



Rise in 'intelligent' technology that learns from and responds to your needs: Home Refill



New in-market examples from around the world



Kirin the Japanese beer, offers regular keg deliveries to Japanese homes, using a special beer server design that saves space and time



Japan



Aido home assistant is the most advanced of a generation of personal robots that learns from its family and automates a household



USA



TOMRA Food streamline food manufacturing sorter is a breakthrough Artificial Intelligence innovation for food manufacturers



United Kingdom



Life in flux

The boundaries between work and
leisure, on and off, day and night
are blurring

Formerly CHANGING ROUTINES



How it was



Consumers accessing products and services when they are available, as defined by traditional notions of daytime and night time activities

How it is



Brands delivering offers at the times when consumers want them, regardless of traditional day/night routines

How it will be



Bricks and mortar stepping up and innovating to overcome limits and restraints





New in-market examples from around the world



Amazon plans to expand into brick-and-mortar stores – including convenience stores and drive-up destinations



USA



Bento Shogun provides hot bento boxes made with fresh ingredients, delivering them directly into offices



Japan



B.Y.O.C (Bring Your Own Cocktail) tells customers to bring their own bottle of spirit, which is then made into cocktails on the night



United Kingdom



NEW
2017

Functionality with personality

An expectation and capability to
add greater personalisation and fun
when dealing with daily demands of
busy lives





How it was



Technology delivering simple services, controlled by users through websites and apps for uber, deliveroo

How it is



Technology able to inject personalised discovery, magic and excitement through aggregated data and algorithms: Amazon Echo

How it will be



Technology facilitating a smoother and more enjoyable transition between the digital and real world for eg chatbots





New in-market examples from around the world



Clac des Doigts (Click of the Fingers) is a service where customers request demands through SMS



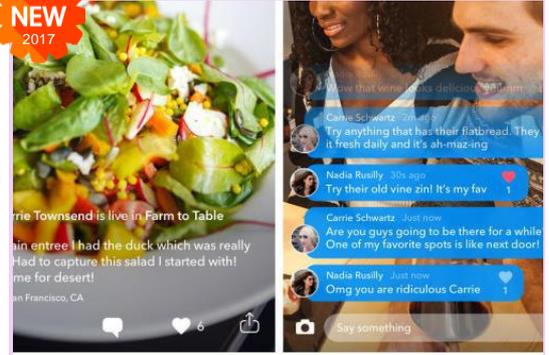
France



GetCook is a platform that helps people spice up their dinner parties by finding specialty chefs



Brazil



Nom food finder app reviews restaurants and recipes in real time with users contributing to a live feed



United Kingdom



Next level

Leverage technology to pre-empt *where* your consumer will be and *what* their needs will be? Can your product be delivered exactly *how* and *when* a consumer needs it?



Use big data, deep learning* and artificial intelligence to add some magic, excitement and discovery to consumer's everyday lives?

*Deep Learning is a branch of machine learning based on a set of algorithms that attempt to model high level abstractions in data.



Next level

Use simple visual cues and interfaces to minimise decision making and maximise time for your consumer?



Remove layers of decision making for the consumer through automation?



Next level

Make your products suitable for consumption in a variety of moments and at different times of the day and night?



Work with wearables, or tech services to compliment and improve your product?

Shared experiences



“I’m seeking experiences I can share with others, to enrich my daily life and escape life’s pressures”



**EXHILARATION IS AN
ANTIDOTE TO LIFE
PRESSURES**



**IF IT'S NOT ONLINE, IT
DIDN'T HAPPEN**

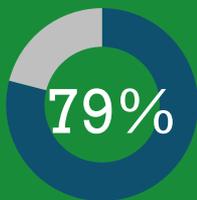


**DEEP ENGAGEMENT
COMES FROM
EXCITEMENT +
INNOVATIVE SHARING**

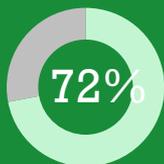


Splurge on out-of-home leisure activities with friends and family (e.g. eating out, going to the cinema, sports events etc): Likelihood to do in next 12 months

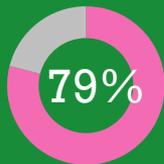
(% very/somewhat likely, 2015)



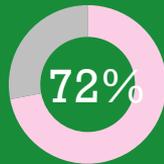
Global Average
+1% since 2015



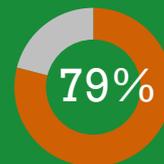
AUSTRALIA



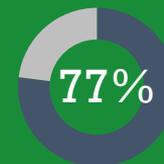
FRANCE



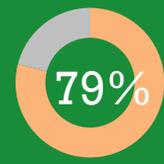
BRAZIL



USA



JAPAN



GB

MAKERS & BROTHERS

[Shop](#) [Makers](#) [Arrangements](#) [Notes](#)

[Back to notes](#)

“The more digital people’s lives become
The more people crave the physical”

Makers & Brothers



Overview of the sub-trends



Fun and play

Enjoyment through play and novelty

Immersive experiences

Seeking experiences that enrich and transport

Passion and purpose

Experiences that introduce meaning and purpose to life

Shareworthy moments

Turning up every aspect of a moment to intensify the experience and share the feeling



New sensations

Desire to experiment with new and novel products

Chameleon living

Flexibility that accommodates the crossover of networking, socialising, work and play





How have the sub-trends evolved?



Shared experiences are not merely a frivolous pursuit but a necessity for many who increasingly feel starved of real moments of connection with others; with this in mind we see **two shifts in the sub-trends:**

Richer Rewards



Shareworthy Moments

Home-Style Comforts



Chameleon Living



How dynamic are the sub-trends?



Heating up
Still warm
Cooling



Passion and purpose

Experiences that introduce meaning and purpose to life

Shareworthy moments

Turning up every aspect of a moment to intensify the experience and share the feeling



Chameleon living

Flexibility that accommodates the crossover of networking, socialising, work and play



Heating up
Still warm
Cooling



Fun and play

Enjoyment through play and novelty

Immersive experiences

Seeking experiences that enrich and transport

New sensations

Desire to experiment with new and novel products



Fun and play

Enjoyment through play and novelty





How is this sub-trend evolving?



How it was



Appreciation of brands that incorporate a playful dimension into products, packaging or communications

How it is



Increased interest in brands and experiences that put playfulness front and centre

How it will be



Brands facilitating moments of fun, play, and release at every touch-point with the brand



New in-market examples from around the world



Consumer Lifestyle Trends

NEW
2017



Wonder Vault by Oreo pulls grown-ups back to their childhood in an oversized installation



USA

NEW
2017



California Donuts encouraging people to get creative and make their own



USA

NEW
2017



Zauo's catch-and-eat concept involving people in the first steps of their meal



Japan



Immersive experiences

Seeking experiences that enrich
and transport





How is this sub-trend evolving?



Consumer
Lifestyle Trends

How it was



Focus on the hidden treasures of day-to-day life

How it is



Growing desire for moments of escape from the every day, together with total immersion in the 'other'

How it will be



Providing deeper appreciation of an experience by enhancing it with concepts that educate and enlighten

NEW
2017



New in-market examples from around the world



Chapter 53 is creating a whole world centred around producers and their produce within the dining experience



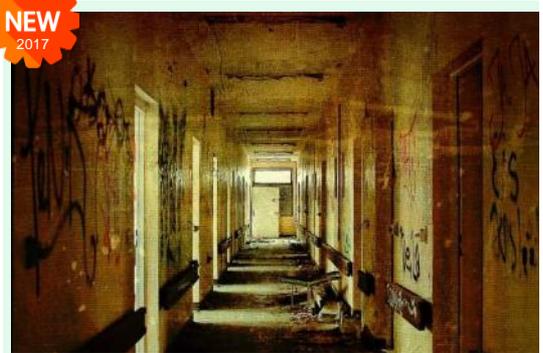
Australia



Food Jams provide people with an opportunity to connect and meet with new people and at the same time learning new skills



South Africa



Escape Rooms create real-life 'movie moments' for thrill-seeking friends



Germany



Passion and purpose

Experiences that introduce
meaning and purpose to life

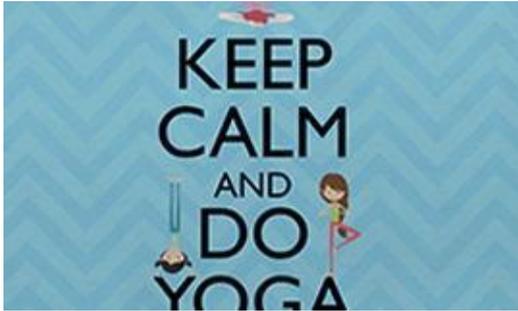




How is this sub-trend evolving?



How it was



Aspiring to self-improvement through fun and fulfilling moments

How it is



Having the time and resources to develop skills and pursue passions that benefit both self and others

How it will be



'Productive downtime' becomes a key way to benefit the individual and others



New in-market examples from around the world



LE SOCIAL BAR

Le Social Bar's playful atmosphere that promotes deep human connection and interaction



France



Fixin Diaries host **Ladies Brunch & Ride** to bring women together to eat and explore



South Africa



Casserole Club letting people share meals with those less fortunate or in need



United Kingdom



Australia



Shareworthy moments

Turning up every aspect of a
moment to intensify the experience
and share the feeling

Formerly RICHER REWARDS





How is this sub-trend evolving?



Consumer Lifestyle Trends

How it was



Seeking small but indulgent experiences that can ideally be physically shared with others

How it is



A desire more exciting everyday treats and rewards – shared online with friends and followers

How it will be



NEW 2017

All brands recognise their role as a curator and creator of 'lifestyle', bringing people the most interesting experiences



New in-market examples from around the world



Pun holidays – from beard day or good meat day – give people an excuse to propel any occasion into something fun and shareworthy



Japan



Belvedere Vodka Events brings a prestigious association to the end user's experience through celebrity endorsements



USA



New sensations

Desire to experiment with new and
novel products





How is this sub-trend evolving?



How it was



Products that give enhanced sensory experience on multiple fronts

How it is



Products that facilitate new sensory journeys
Three minute concerto

How it will be



New sensations are not just for special occasions but woven into everyday eating as people look to broaden their palettes through sensory exploration



Consumer
Lifestyle Trends

New in-market examples from around the world



The Woolworths Summer Sensorium hosted in a Geodesic Dome appealing to all five senses with 'A Taste of Australian Summer'



Hoegaarden Floating Garden adds a moving tour to the experience by floating around the city



Chameleon living

Flexibility that accommodates the crossover of networking, socialising, work and play

Formerly HOME-STYLE COMFORTS





How is this sub-trend evolving?



How it was



'Fast casual' and informal experiences which fit around busy routines

How it is



Much slower, informal occasions – day or night - in surroundings reminiscent of home

How it will be



Products and services that are able to flex to the tempo of the occasion and mood



New in-market examples from around the world



Consumer Lifestyle Trends



Guinness and Boiler Room partnership at Notting Hill Carnival propelling the drink into the day economy



United Kingdom



Hive is an hybrid space in Mumbai – pitch for your chance to host an event!



India



El Sopal (The Dinner) popular new Spanish reality show, introducing crazy dining concepts



Spain

“Room”scaping



NOW
 LATER

Accessorisation: Lighting, Ornaments



NOW
 LATER



57% of adults nationally believe that their Garden is like another room for entertaining

It's another room really. In the summer we'd have our breakfast out here and have BBQs in the evening
(Female, 55+, Dublin)





57% of gardeners have a patio or decking area and **35%** have a BBQ area





17%
of Gardening
Spend is on
BBQ's/Outdoor
Furnishings





8 in 10

with Kids consider
their Garden a
playground

Our garden is like another room for us and the kids. It's where we spend most of our time when the weather is good.
(Female, 30, Cork, 2 young kids)





73%

When I was growing up I used to spend a lot of time with my Dad in the garden. Now I love it and hope I will pass it on to my children too
(Male, 24, Dublin)



of gardeners use it is a space for bonding with family; young and old.





Thought-starters: How could you..?



How can you inject fun and play into your brand

Could you help customers be involved in the selecting of ingredients, cooking of the food,??



Thought-starters: How could you..?



Could you use 3D or augmented reality to engage your customers for eg showcase producers, highlight ingredients/produce through use of sound, etc

How can you facilitate a more immersive experience?



Thought-starters: How could you..?



What about passion
and purpose?

Host events for local
community groups, give
a portion of profits to a
specific initiative that
enhances peoples lives



Thought-starters: How could you..?



Its all about the
“shareworthy
moment”

Create events that
you can communicate
and use to build your
brand story



Thought-starters: How could you..?



The new sensation

Educate the senses!
Showcase and
immerse consumers
in the “how to” and
ways to *present*, etc



Thought-starters: How could you..?



Creating
Chameleon
Spaces

Soundtrack your
brand!



Personal value seekers

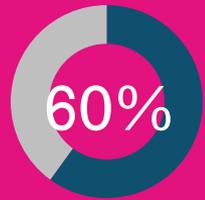


“I’m willing to spend money on the things that are valuable to me, and am pursuing more creative ways of getting what I want”

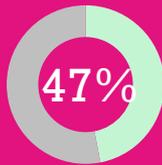


Importance of a brand sharing
and promoting the values I most
care about

(% essential/important to have)



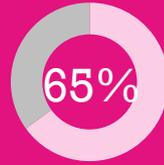
Global Average



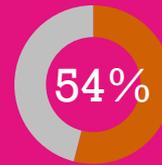
AUSTRALIA



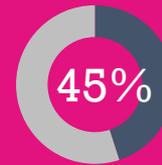
FRANCE



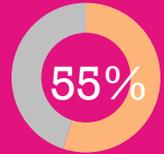
BRAZIL



USA



JAPAN



GB



The sharing economy

The web enabling information sharing and new models of ownership

Personal values

Willingness to save and spend where it matters to you most

Redefining values

Rising expectations of added functional and emotional benefits

Tailored to me

Products and services that are tailored to the end user are truly unique and ultimately markets of exclusivity



The new experts

Leveraging newly available sources of expertise to get the best products and deals for you



How have the sub-trends evolved?



Value is increasingly defined by consumers on their own terms, with lifestyles becoming the vehicle for personal broadcast; with this in mind we see **one shift in the sub-trends:**

Exclusive Choices



Tailored to me



Heating up
Still warm
Cooling



The sharing economy

The web enabling information sharing and new models of ownership

Personal values

Willingness to save and spend where it matters to you most

New experts

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Heating up
Still warm
Cooling



Redefining values

Rising expectations of added functional and emotional benefits

Tailored to me

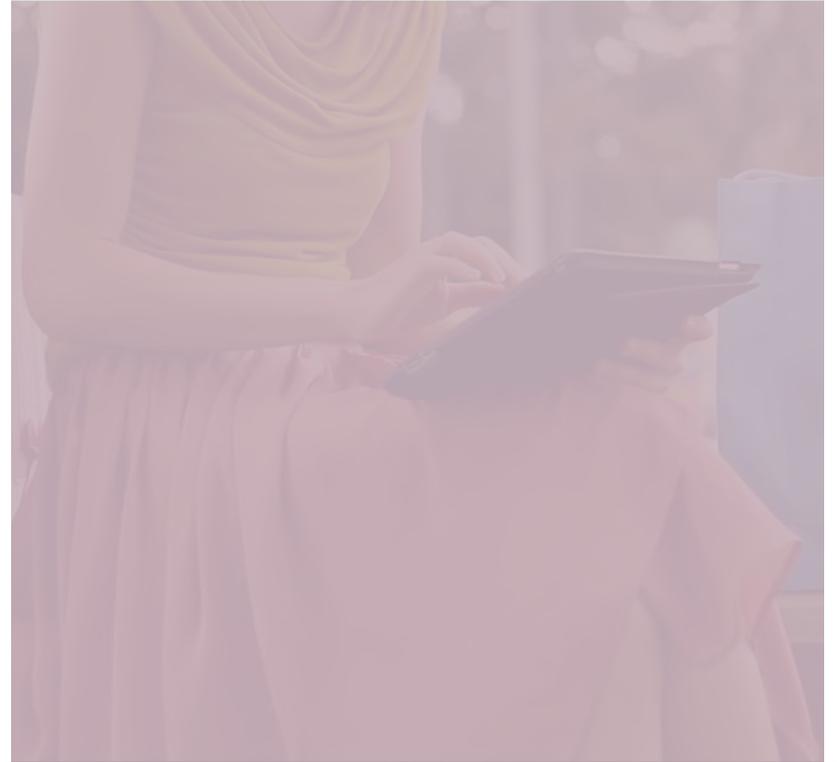
Products and services that are tailored to the end user are truly unique and ultimately markets of exclusivity





The sharing economy

The web enabling information
sharing and new models of
ownership





How is this sub-trend evolving?



How it was



Sharing information with your personal network, and collaborating with peers to access the best deals

How it is



Growing interest in sharing not only advice and recommendations, but also the ultimate products and services

How it will be



High-tech capabilities allow the peer-to-peer sharing of basic skills, assets, and resources for eg **La Ruche Qui Dit Oui is a pre-order weekly market organised online, meeting offline**



New in-market examples from around the world



House of All creates space for exchanging things, ideas, skills, and expertise



Brazil



Lou Papé creating a platform for seniors to share their skill, advice, and passion around food and cooking



France



Yerdle helping brands to develop re-use programmes, providing access over ownership to people

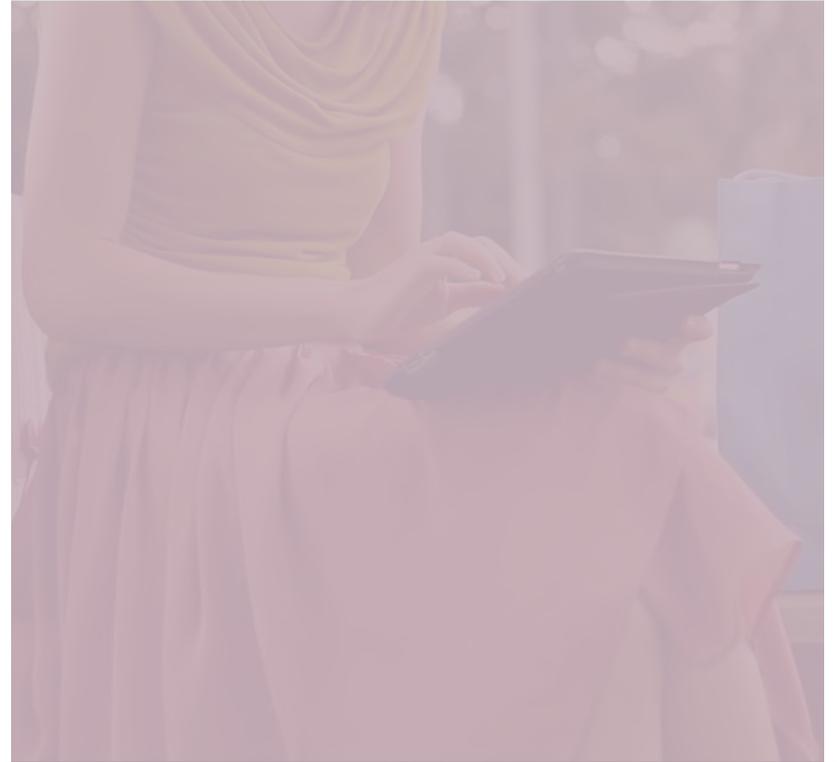


USA



Personal values

Willingness to save and spend
where it matters to you most





How it was



'Trading up' and 'trading down' within the same category

How it is



Combining premium and budget elements within a single product or experience: Big & Little Chicago: foie gras mousse burgers and truffle oil friets

How it will be



People giving more attention to their mental wallet, budgeting for saves as well as splurges. (Mint)



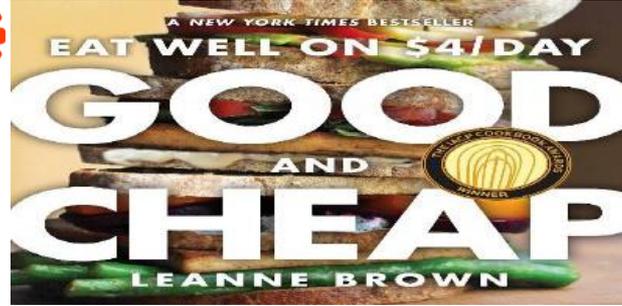
New in-market examples from around the world



Seijo Ishii catering to the uprising of foodies who want to splurge on niche ingredients



Japan



Good and Cheap: Eat Well on \$4/Day guiding people to eating well while sticking their food budget

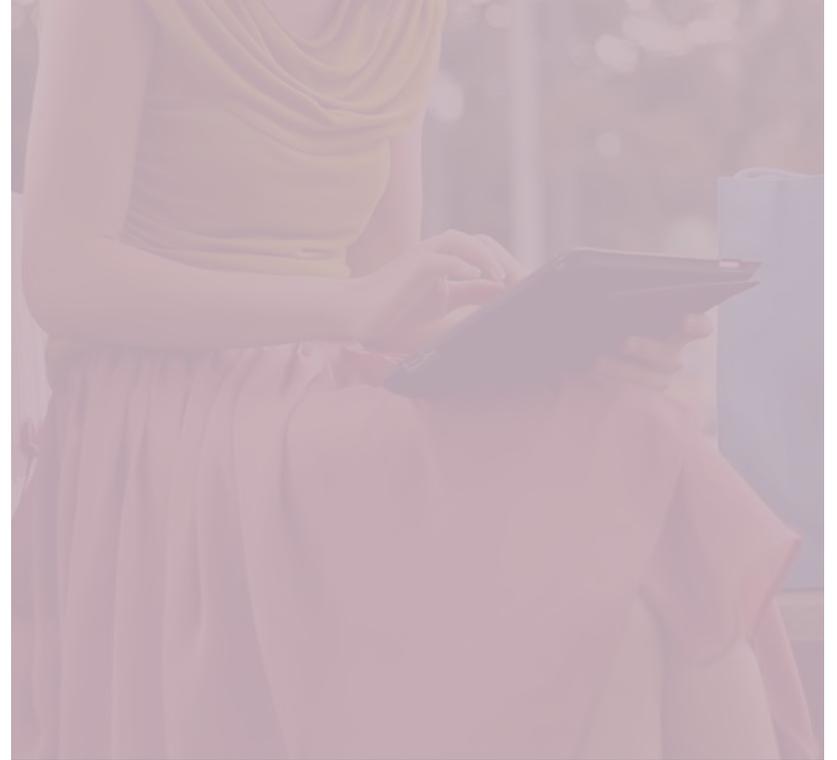


USA



Redefining values

Rising expectations of added
functional and emotional benefits





How it was



A desire for good value beyond just price e.g. versatility, transparency, control

How it is



Zoomal is a crowdfunding platform facilitating the creation of enterprises and brands that meet consumers needs or align with their values

How it will be



Primarily products need to work for the consumer but after that they must align with values, and do some additional good “who gives a crap”



New in-market examples from around the world



Consumer Lifestyle Trends

NEW 2017



5Skeppas Beer promoting South African culture and tradition on an international stage



South Africa

NEW 2017

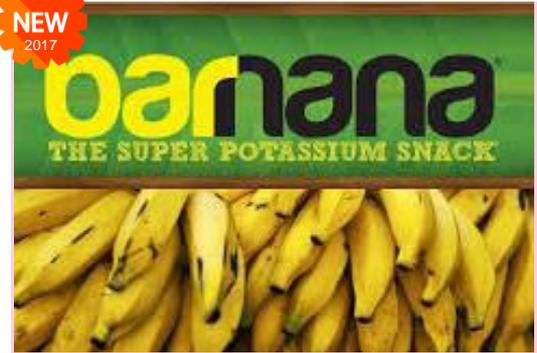


RockStar Energy Drink aligning with fringe youth culture that values high-intensity living



USA

NEW 2017



Barnana's sustainable business model, aligning with people's passion to reduce food waste : making banana based snacks from imperfect bananas



Brazil



NEW
2017

Tailored to me

Products and services that are tailored to the end user are truly unique and ultimately markets of exclusivity

Formerly EXCLUSIVE CHOICES





How is this sub-trend evolving?



How it was



Exclusivity in everyday products, invite only products and content

How it is



Exclusive product and service experiences that consumers can easily share with and impress their friends

How it will be



Products and services that are tailored to the end user are truly unique and ultimately markets of exclusivity



New in-market examples from around the world



NEW
2017



Trunk Club putting people's tastes and characteristics first, curating exclusively picked wardrobes



USA

NEW
2017



Vinome wine delivery based on DNA taste profiling



USA

NEW
2017



Fresh Fitness Food creating nutritionist designed meals with your personal requirements and goals in mind

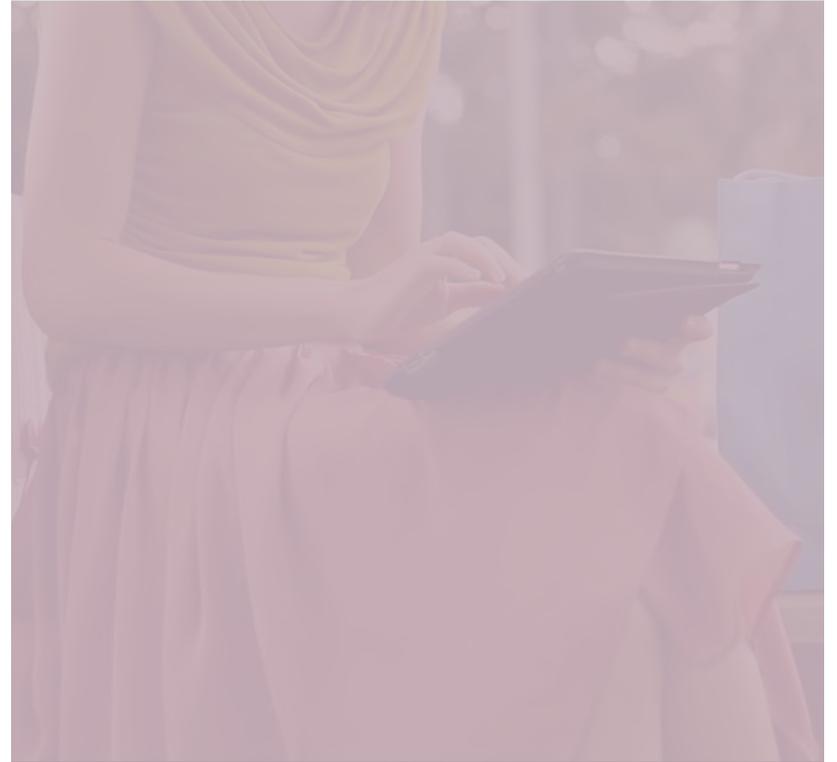


United Kingdom



New experts

Leveraging newly available sources
of expertise to get the best products
and deals for you



The Gardener of the Future



Connected



In a connected world, the **gardener of the future will embrace the benefits of new technology for inspiration, advice and management**



The online retailing channel is still in its infancy in the world of gardeners, but this is likely to develop further in the future.

Collaborative



Younger gardeners and aspiring growers **seek guidance** from a variety of sources; online and offline including groups, clubs and also from the more experienced



There is an opportunity to develop a portal for interested novices to develop the mission to attract new gardeners.





I use my eyes for inspiration to be honest
but when I need further information or
advice I would google the particular flower
or plant
(Female, over 50, Dublin)



Online as a source of information and inspiration is becoming more prevalent amongst Gardeners





How it was



Individual consumers pursuing knowledge and discernment as an increasingly important social marker of accomplishment

How it is



Trusted consumer experts, whose opinions and advice in their specialist area are hugely influential

How it will be



All parties - brands, self-made experts, people - share, collaborate and question to find mutually beneficial solutions for eg Hoje Tem Frango where nutritionists activists and chefs all share their view in one unique platform



New in-market examples from around the world



NEW
2017



London's anonymous **Clerkenwell Boy** finding the hottest restaurants before critics



United Kingdom

NEW
2017



Mama Blogs empowering women from all walks of life to share their expert knowledge and experience



Japan

NEW
2017



GlutenDude connecting a wider community of peers to co-create solutions for gluten-free living



USA



Thought-starters: How could you..?



Next level

Ensure your product meets consumer needs on a functional *and* emotional level? How can you best align with their personalities and values?



Change the story of your category, challenge the definition of your product, and offer something new and relevant?



Next level 

Bring an element of exclusivity or 'shareability' to your product offer? Could partnerships make this possible?



Give consumers the opportunity to customise your products to have a greater sense of ownership?



Next level

Leverage the power of today's 'new experts' to create excitement around your product?



Create a buzz around your brand to be the place where people actively come to have a voice and participate? What shared values can you dial up?