



Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board



Today

Background to Consumer Lifestyle Trends


Global Forces of Change

The Six Trends

Q&A – How can you work with the Trends

Consumer Lifestyle Trends





**“Don’t explain the past,
predict the future”**

Stan Sthanunathan
Senior VP, CMI, Unilever

**“If you don't
like change, you
are going to like
irrelevance
even less”**

General Eric Shinseki,
retired Chief of Staff,
US Army

How did we identify the Trends?

Macro

Type of trend

'MACRO' S.T.E.E.P. DRIVERS

CONSUMER TRENDS

MICRO CATEGORY TRENDS

Micro



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?

How did we identify the Trends?

1. Top Down

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



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Can we see it manifesting in brand or consumer behaviour?

How did we identify the Trends?

21 markets and 28,000 respondents around the world



How did we identify the Trends?

1. Top Down

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



TREND

2. Bottom Up

Can we see it manifesting in brand or consumer behaviour?

How did we identify the Trends - Streetscapers

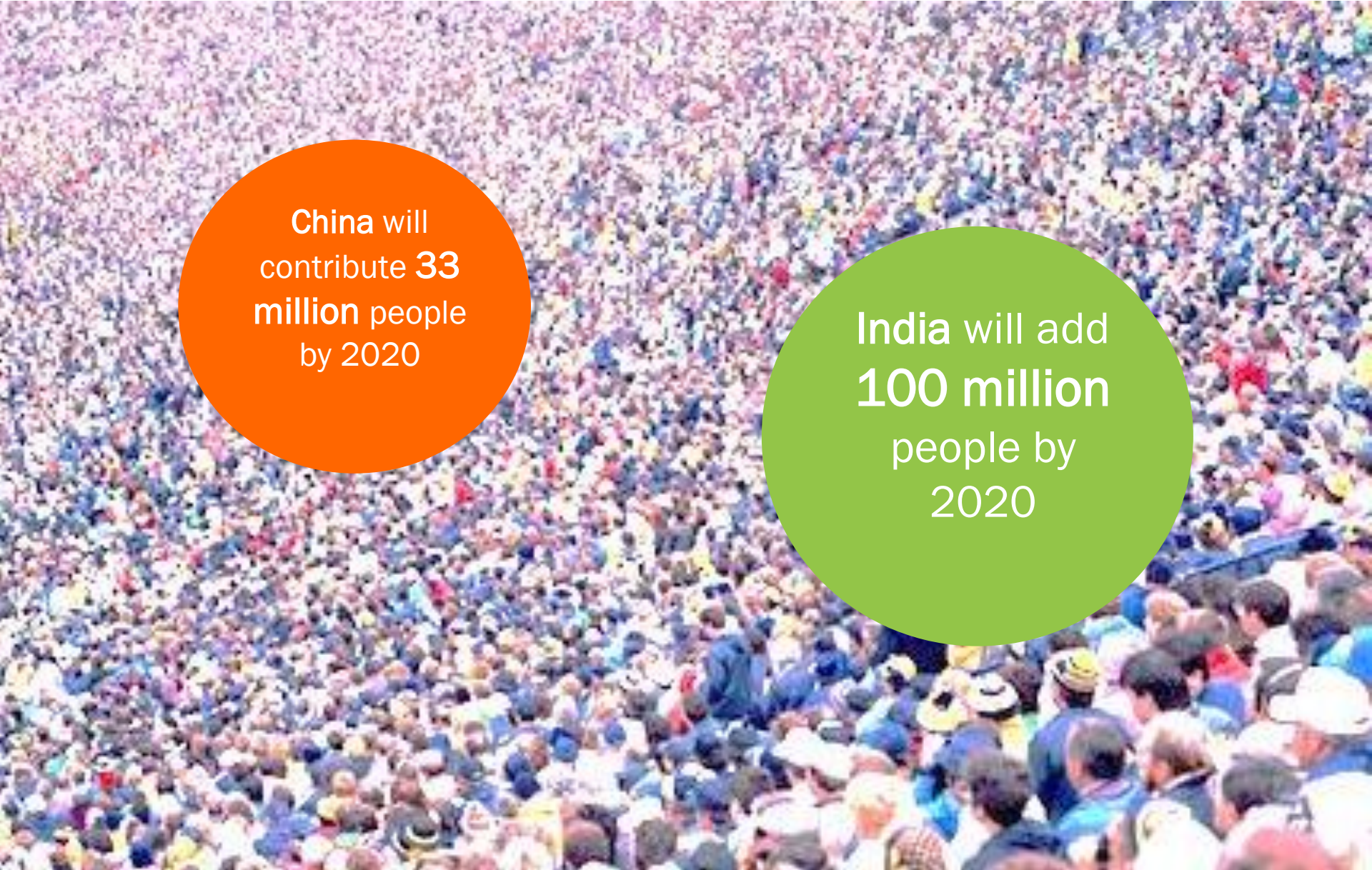
40 countries and 60 cities covering every continent of the world



The global forces shaping the future in 2015




Today's population of 7 billion will likely exceed 9 billion by 2050, with most growth coming from the developing world



China will
contribute **33
million** people
by 2020

India will add
100 million
people by
2020

Africa is the only continent whose population is not ageing, but one mustn't neglect booming pockets of youth in other ageing markets



The average
age of an
Indian in
2020 will be
29

43% of the
population of
**Sub-Saharan
Africa** is below
15

In 2020, there will
be twice as many
15-19 year olds in
Brazil and Mexico
as 60-64 year
olds

And huge increases in 50+ year olds will require us to think in terms of “extended middleagedness” rather than “elderly”

A photograph of a man swimming in a pool, wearing goggles and a watch, with his arms extended forward. The background shows lane lines in the water.

By 2032,
number of
people aged
65+ in UK will
increase 61%

Saudi Arabia will
see a **55%**
increase in
people aged
65+ by 2020

By 2035, the
number of 60+ in
China will be bigger
than the total US
and UK populations
put together

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

In Ireland & the UK, inflation-adjusted earnings have decreased every year since 2008 – we are seeing the ‘death of the middle’

Whereas the ‘middle class’ in **China** will rise from 6% of the population in 2010 to **51%** by 2020

Meanwhile, all over the world traditional family structures are changing, as household size shrinks and women enter the workforce

Northern
European
countries have
the **smallest**
household sizes
on average

1 in 3 UK
households are
single person
households.

56% of Latin
American
women will be
working
outside of the
home by 2020

China will add nearly
400 million women
to its working
population by 2020

Everywhere, tech innovation and greater levels of connectivity are fundamentally altering the way we live and see the world



The highest concentration of internet-enabled devices are found in the **US and Europe**

3 in 4 mobile subscriptions in Sub-Saharan Africa will be internet inclusive by 2020...

...and internet use on mobile phones will increase 20 fold by 2020 – double the rate of growth of the rest of world

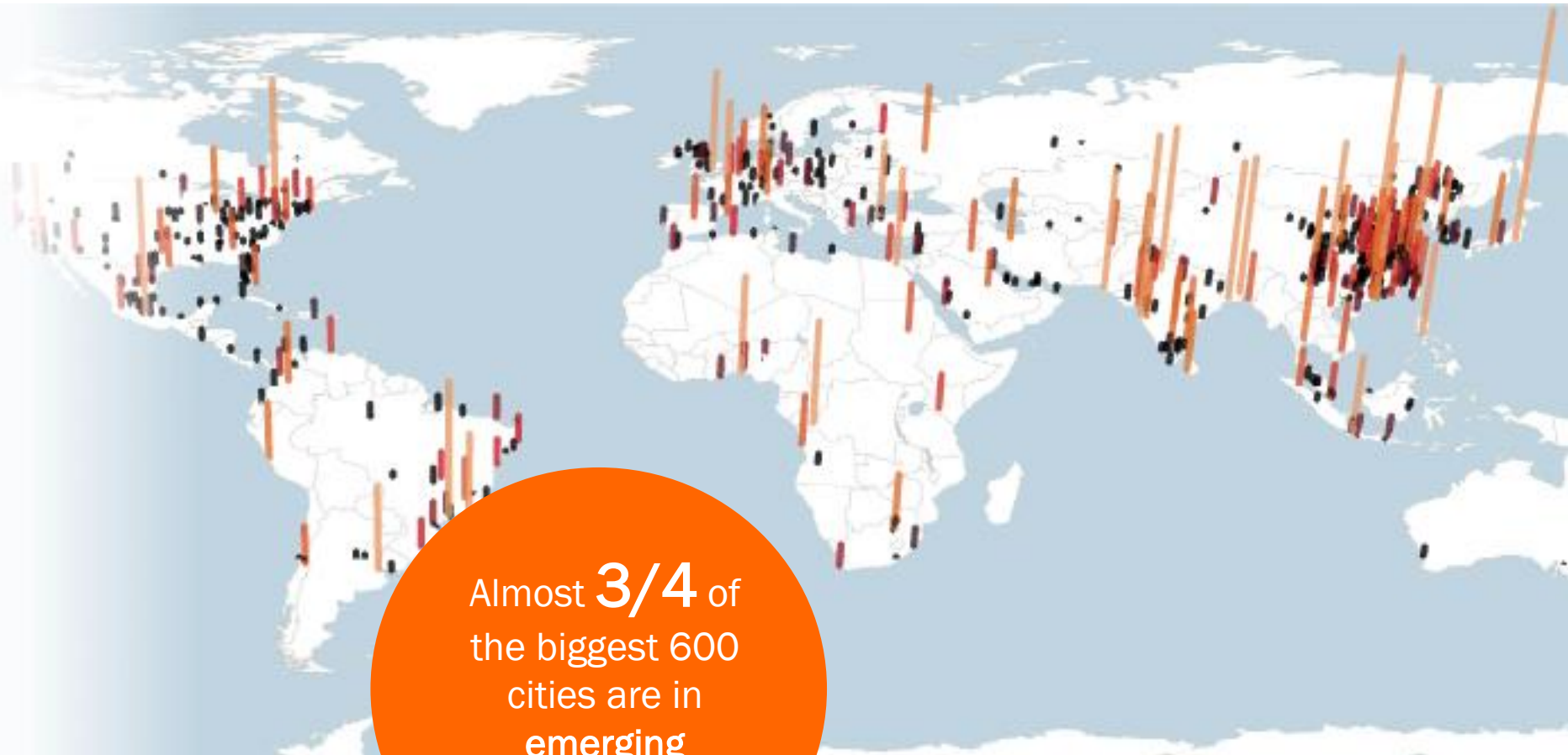
Rising affluence and modern conveniences are bringing about a higher incidence of costly lifestyle diseases

Cardiovascular disease accounts for a **third** of all deaths in **Ireland**

1 in 3 cigarettes manufactured is smoked in the **Western Pacific** region

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

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



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

Population
LOW \longleftrightarrow HIGH

Six Trends



2015 Consumer Lifestyle Trends



Busy
lives



Shared
experiences



Responsible
living



Health and
wellbeing



Personal
value seekers



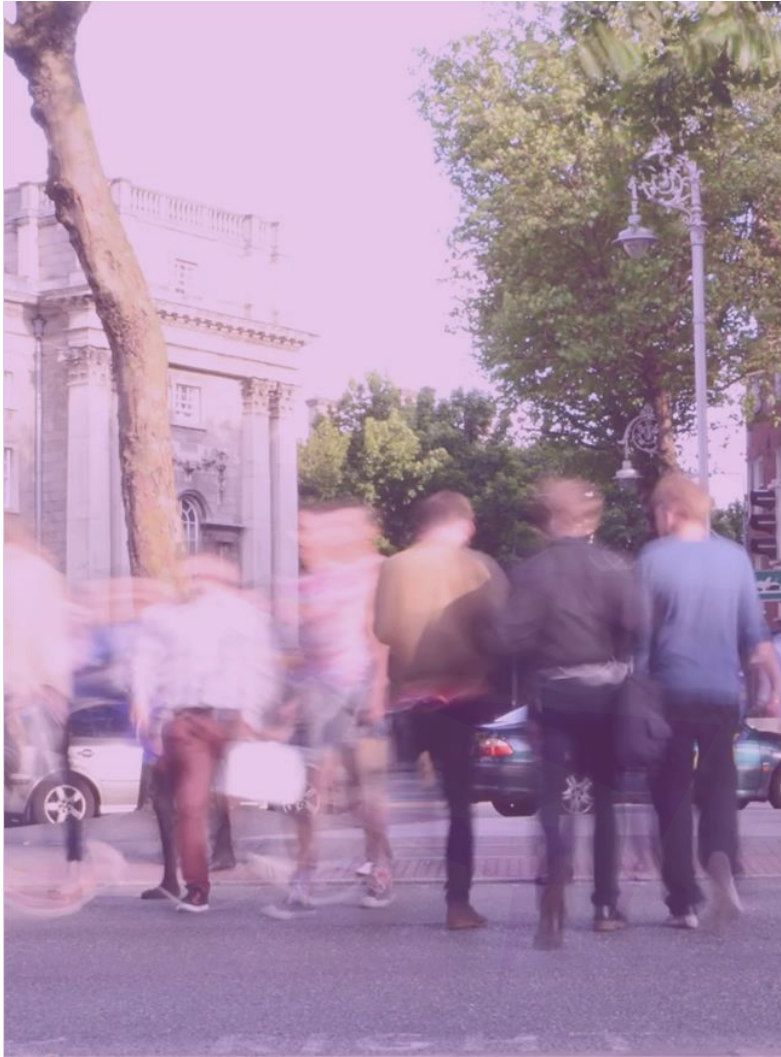
Keeping
it real



Busy lives



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



Right thing, right there

Simplexity

Pre-empting problems

Changing routines

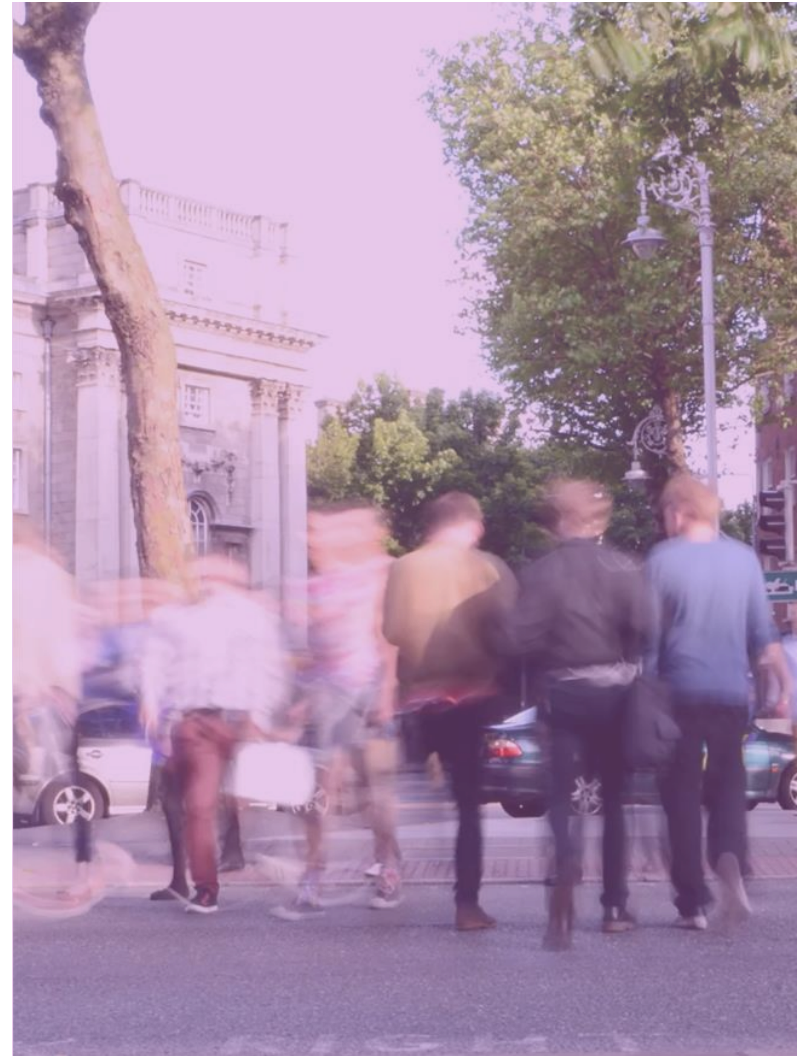


Busy lives sub trend



Right thing,
right there

Having the right
thing when and
where you want it

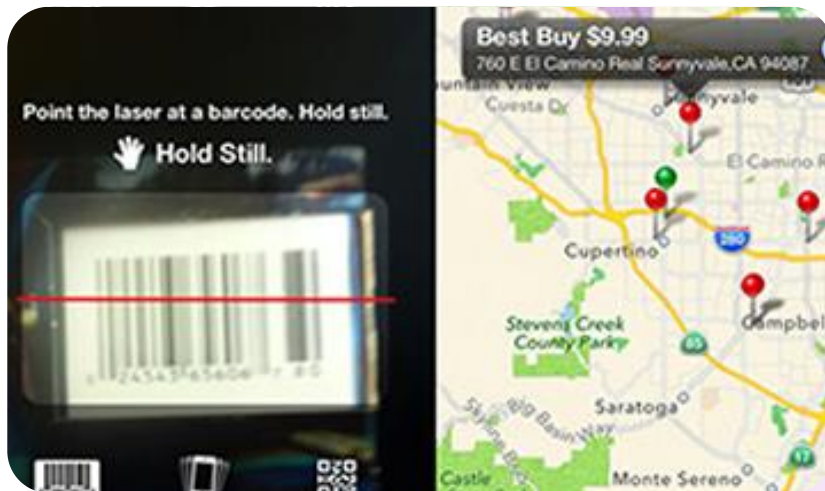


How is this sub-trend evolving?



From

To



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



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



Alipay Wallet, China



Vigoo, Shanghai



Keeping it real



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



Naturally authentic

Do it yourself

Remixing tradition

Craftsmanship

Genuine provenance



Naturally authentic

Desire for products that are
'as nature intended'



How is this sub-trend evolving?



From



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

To



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

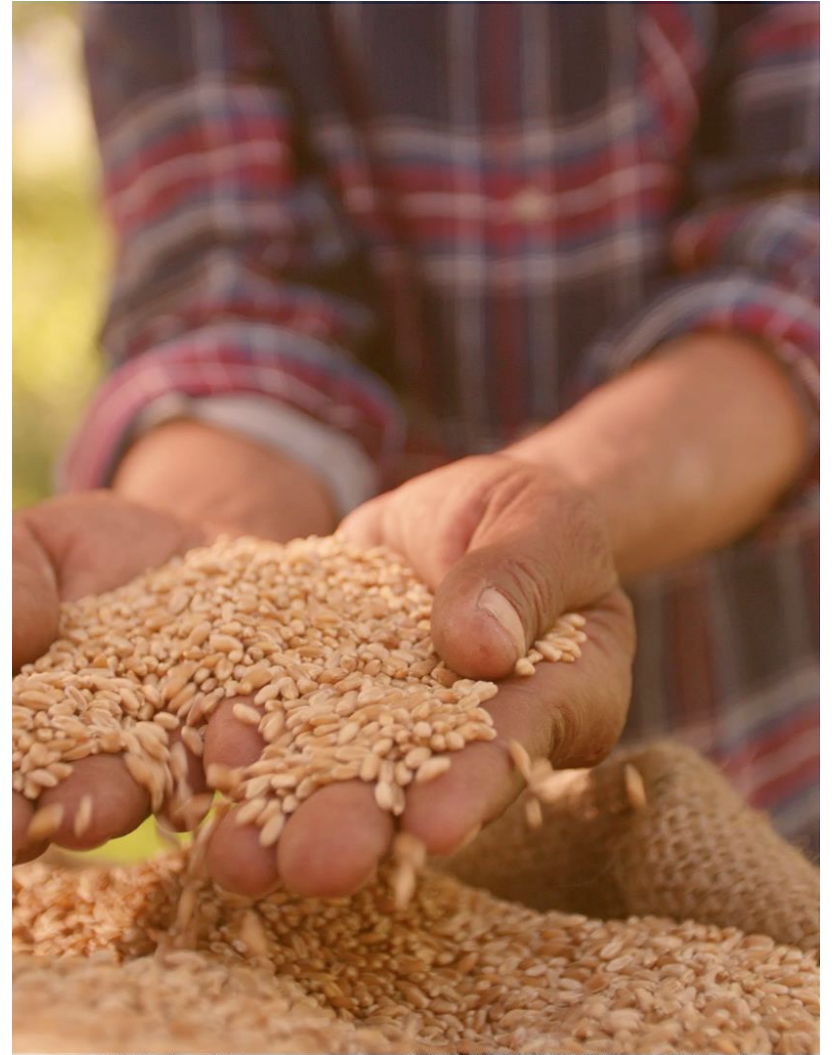


Vovo Telo
South Africa



Do it yourself

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



How is this sub-trend evolving?



From



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

To



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



Consumer
Lifestyle Trends

Do it Yourself in action



The Skip Garden, UK



Remixing tradition

Taking the best of tradition
and heritage to meet
modern tastes



How is this sub-trend evolving?



From



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

To



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



**Academy of Fine Arts,
Poland**



Craftsmanship

Rising interest in the people and
artisan skills behind the product



How is this sub-trend evolving?



From



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

To



Enabling consumers to actively engage with artisan producers



Craftsmanship in action



Iluliaq, Greenland



Genuine provenance

Provenance becoming the
ultimate marker of quality



How is this sub-trend evolving?

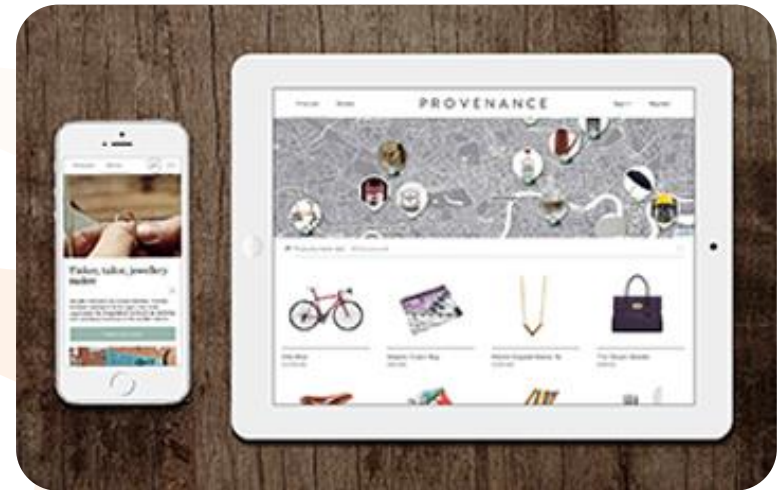


From



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

To



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



Riverford Farm, UK

How dynamic are the sub-trends?



Heating up

Still warm

Cooling



Do it yourself

Remixing tradition



Heating up

Still warm

Cooling

Naturally authentic

Craftsmanship

Genuine provenance



Thought Starters...how can you...



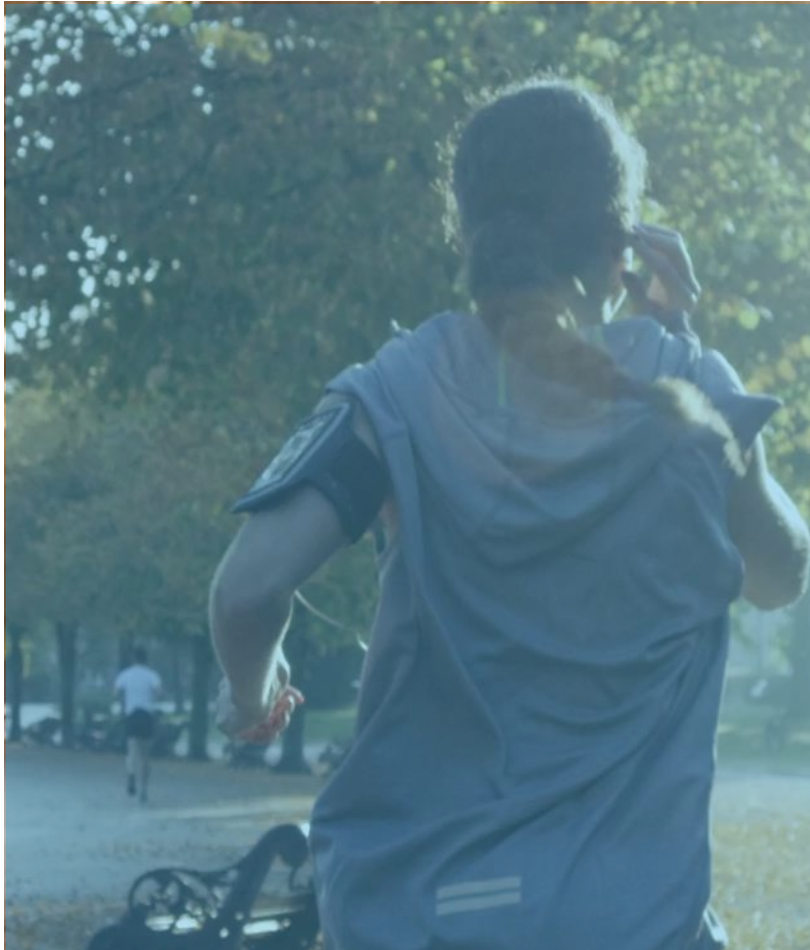
1. Include your consumer in product creation?
2. Emphasize traditional aspects of your products?
3. Ensure your product is 'as nature intended'?



Health & wellbeing



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



Proactive prevention

Essential purity

Creating headspace

Tribal wellbeing

Managing the tempo

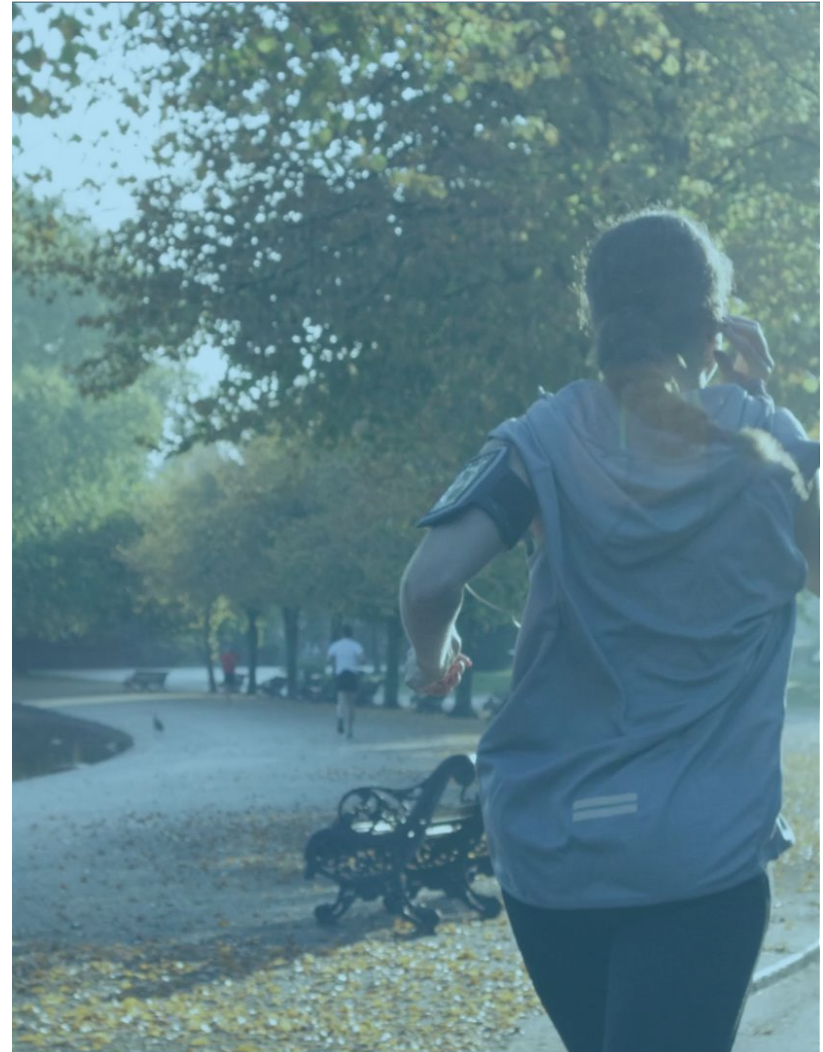
Personal solutions

Good start



Proactive prevention

Proactively defending the body against future disease and illness



How is this sub-trend evolving?



From



A desire for routine and targeted solutions, with tangible benefits

To



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

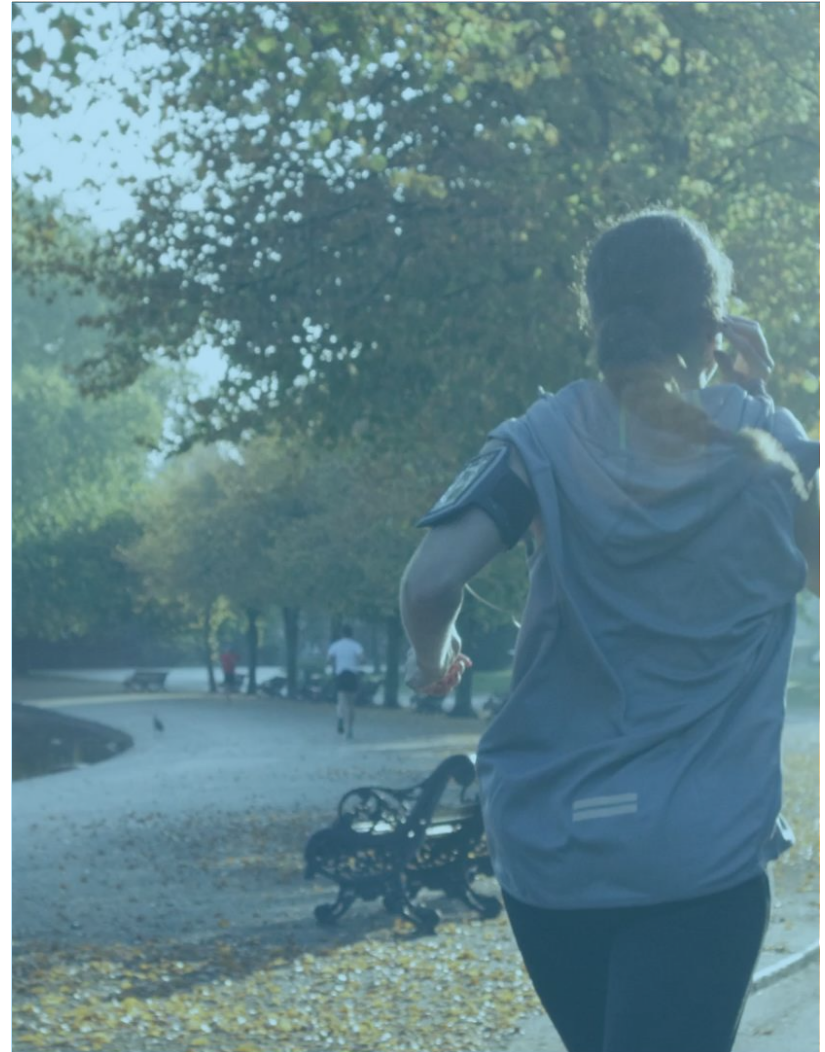


Standing is the new sitting...
South Africa



Essential purity

Desire for raw, natural and
clean



How is this sub-trend evolving?



From

To



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



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

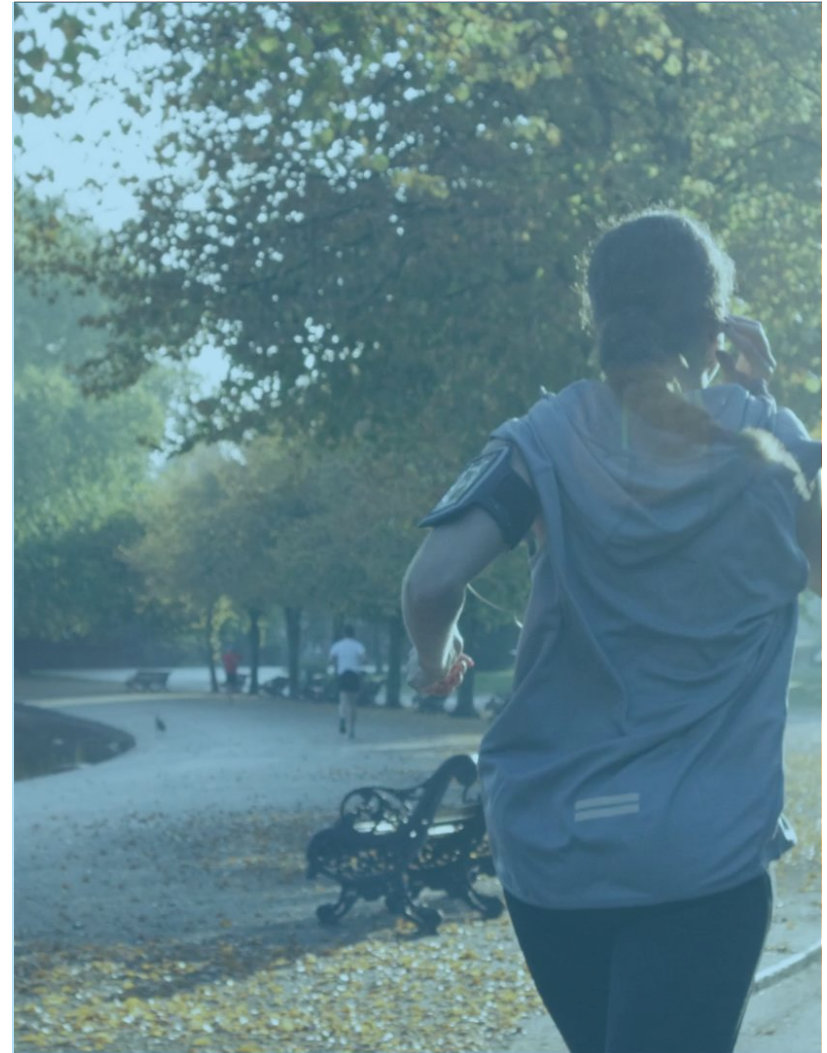


Microfiltered Jax
Coconut Water
Australia



Creating headspace

Desire to take care of your
mental & emotional
wellbeing



How is this sub-trend evolving?



From



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

To



Helping consumers find and experience mental downtime



“Sprigification”
San Francisco

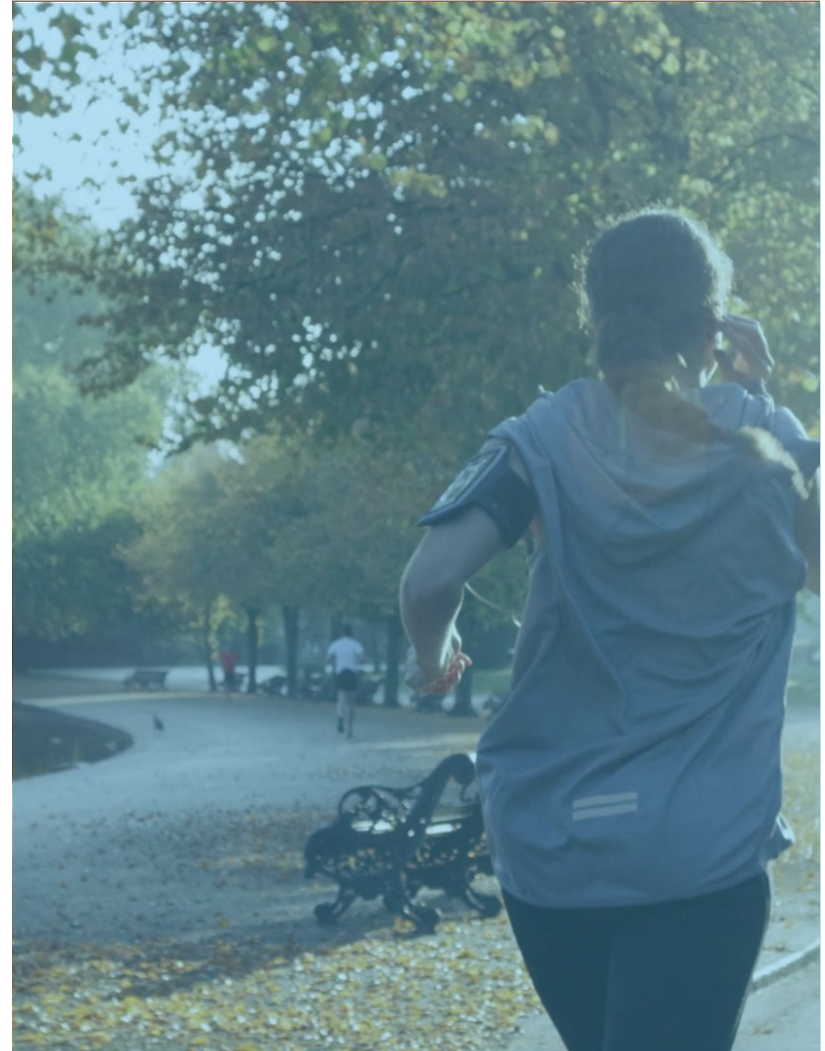


Twinnings, UK
Gets you back to you..



Tribal wellbeing

Increasingly choosing
collective physical &
wellbeing activities



How is this sub-trend evolving?



From

To



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



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



Run an Empire,
UK

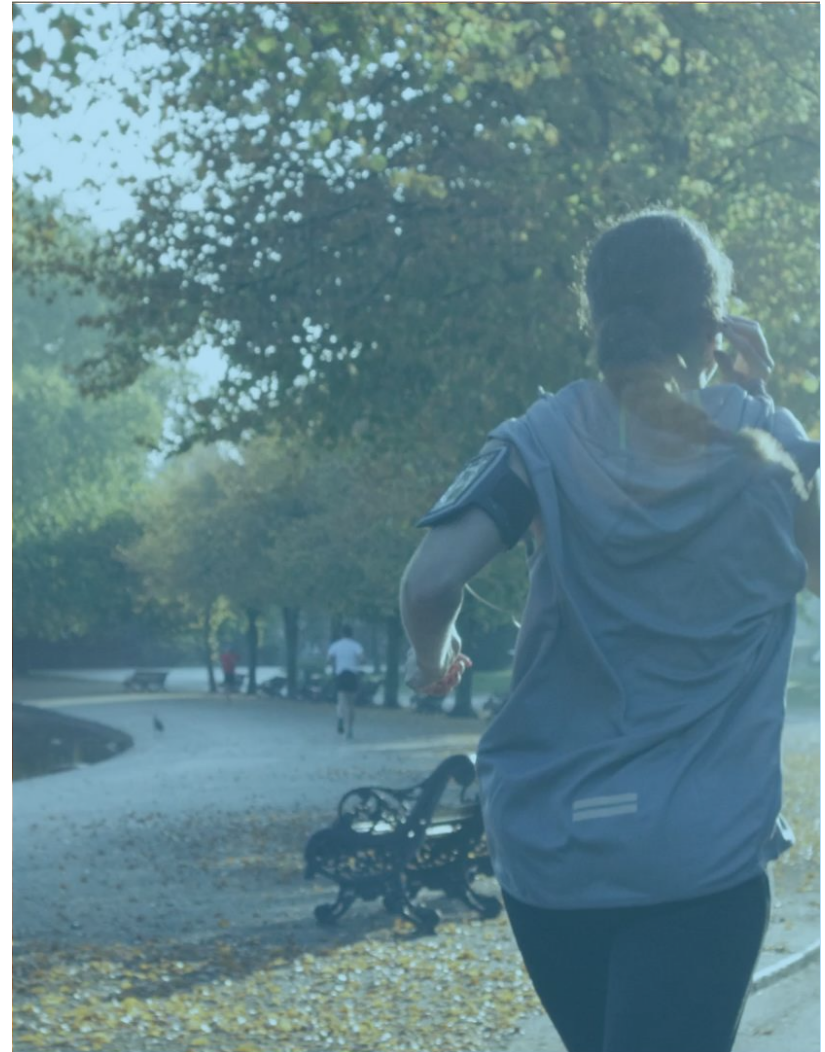


The Powerade Bill Board,
Germany



Managing the tempo

Seeking solutions to suit varying energy needs & optimise wellbeing throughout the day



How is this sub-trend evolving?



From



Energy solutions that feel natural, not synthetic

To



Sophisticated and exciting energy management through understanding food and drink combinations

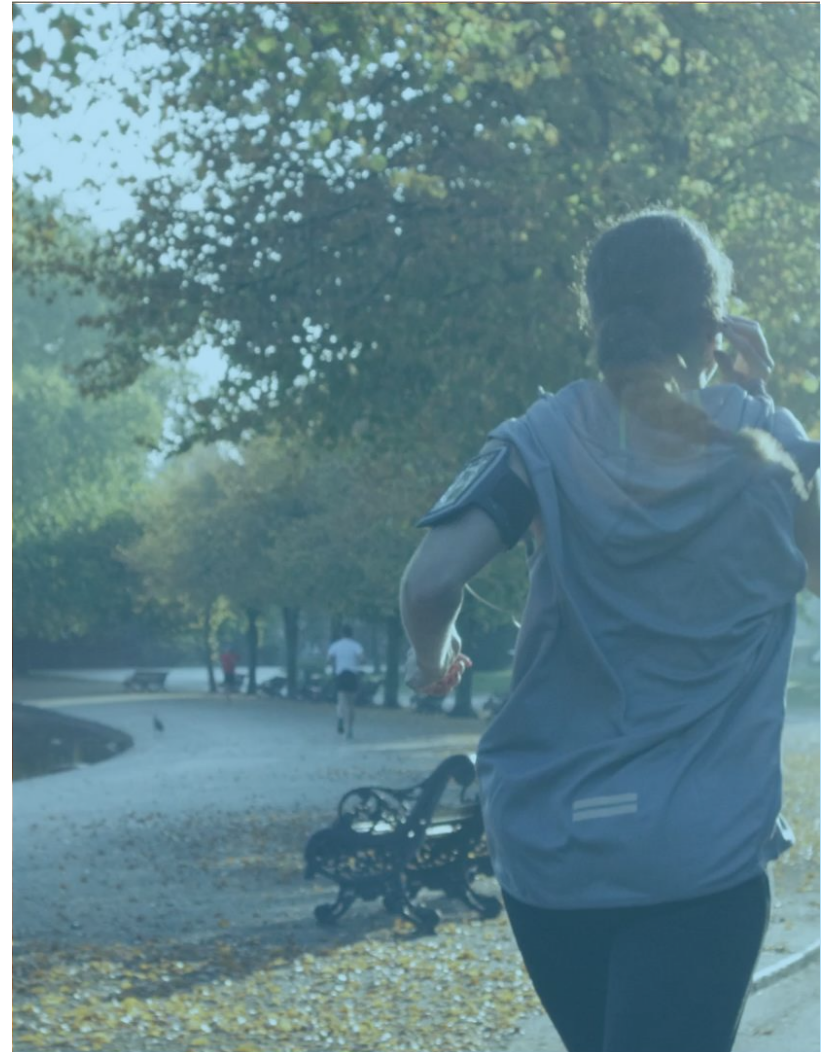


Wake Up!
Israel



Personal solutions

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



How is this sub-trend evolving?



From



**Personalised diets
based on allergies
and intolerances**

To



**Holistic, personalised
and often tech-enabled
plans**

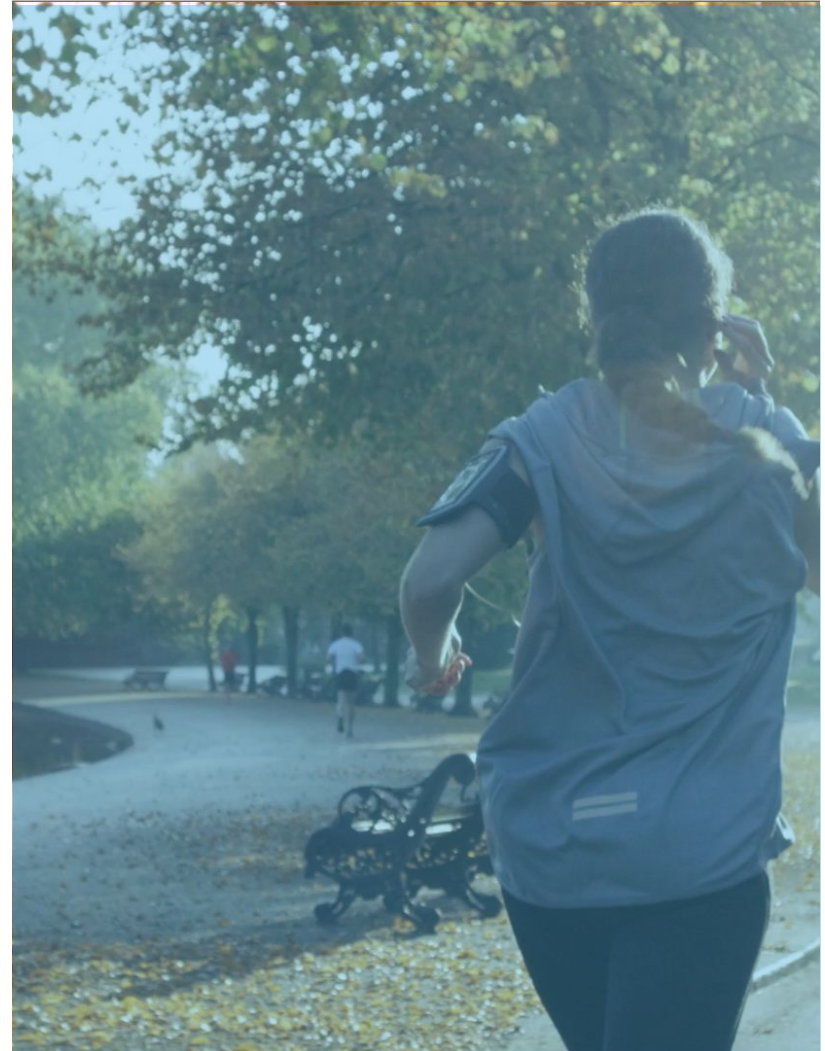


**Maquina:
Brazilian Fit Band**



Good start

Ensuring children get the
best start in life



How is this sub-trend evolving?



From

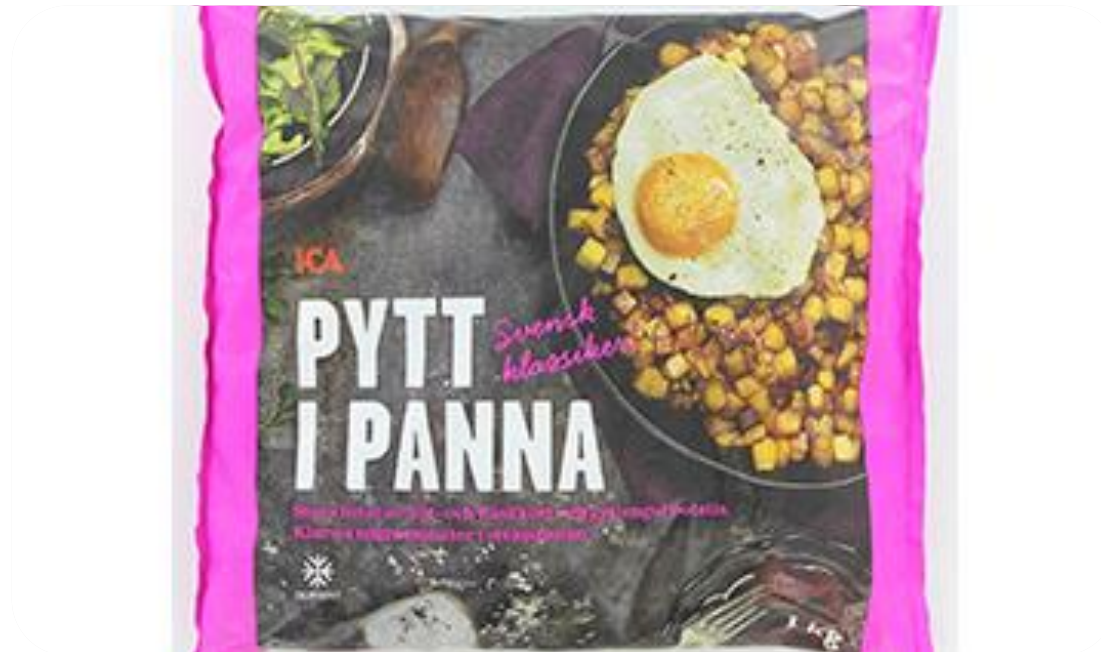


Introducing kids to more sophisticated tastes and food education from a young age

To



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



Swedish snack solutions

How dynamic are the sub-trends?



Heating up

Still warm

Cooling



Managing the tempo

Creating headspace

Tribal wellbeing



Heating up

Still warm

Cooling


Proactive prevention

Personal solutions

Good start

Essential purity



- 
1. How can you leverage technology to help consumers make the most of your product?
 2. Could you pare back ingredients or processes?
 3. Could you customise your product?

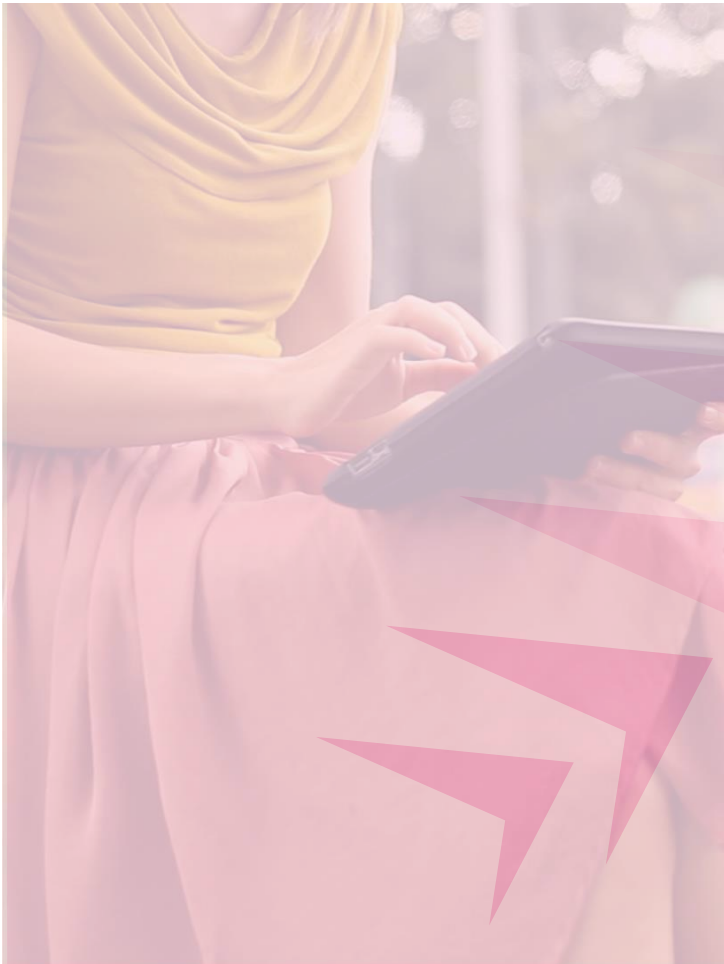




Personal value seekers



“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.”



The sharing economy

Personal values

Redefining values

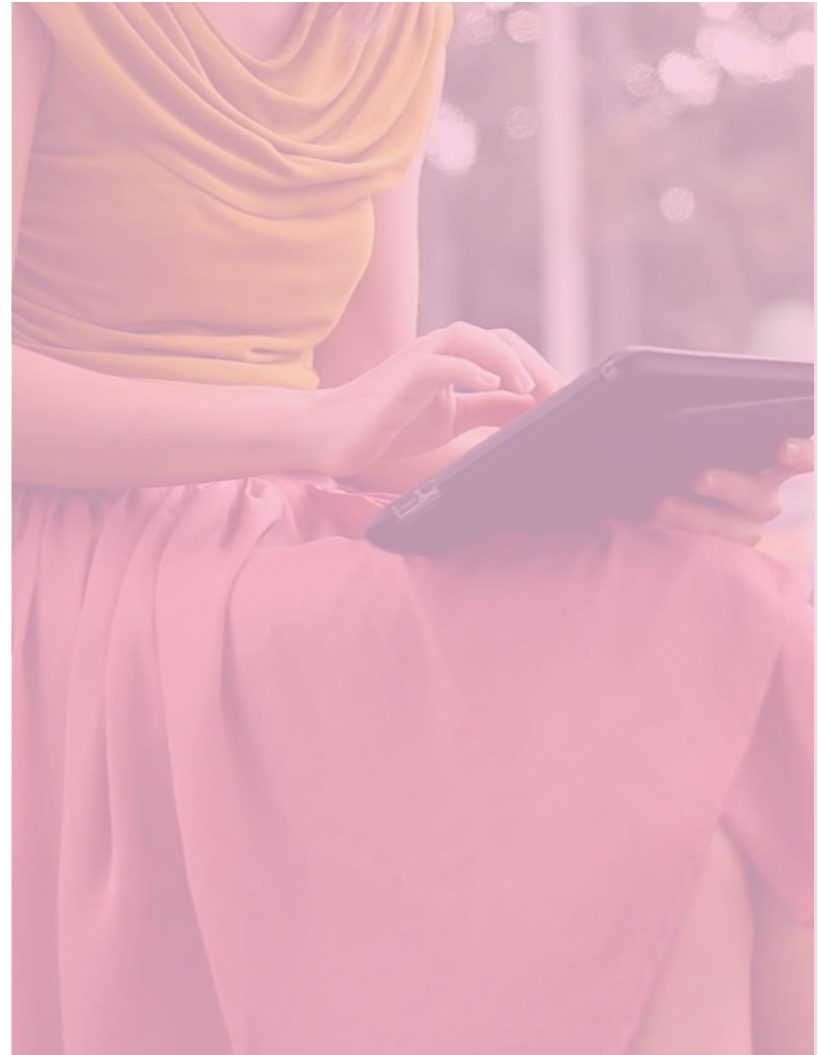
Exclusive choices

The new experts



The sharing economy

The web enabling
information sharing and
new models of ownership



How is this sub-trend evolving?



From



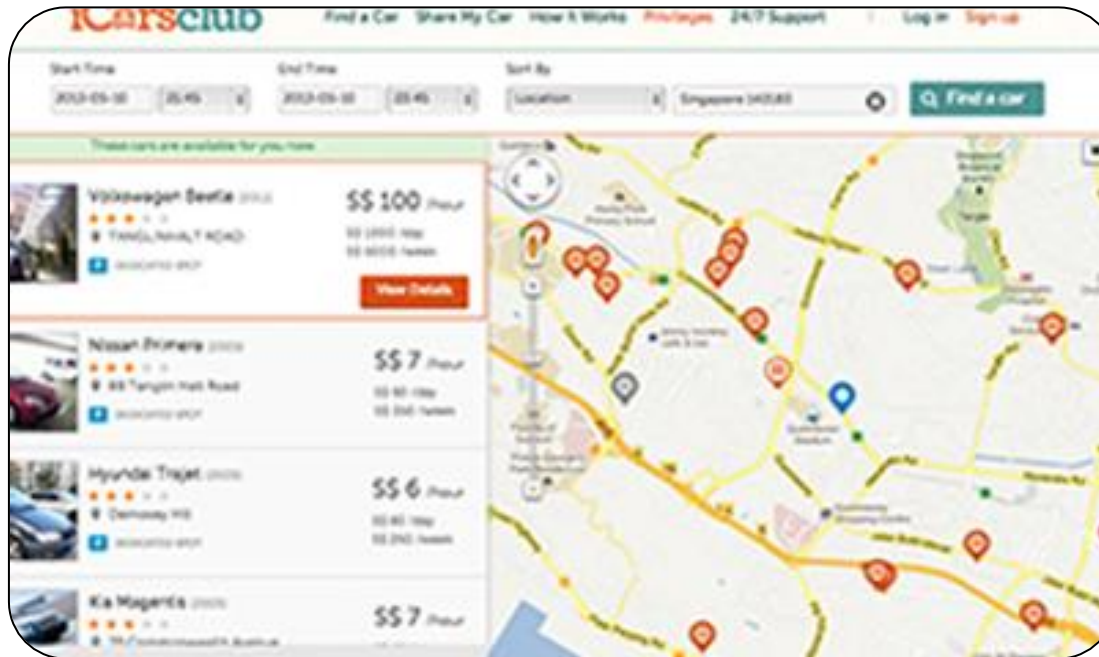
Sharing information with your personal network, and collaborating with peers to access the best deals

To



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

The Sharing Economy in action



iCarsClub,
Singapore



Responsible living



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



Local action

Conserving resources

War on waste

Niche concerns

Fair treatment

Totally transparent



Local action

Working together to have
local impact





From



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

To



Collective community endeavours by proactive and like-minded individuals



**Community Shop,
UK**



Conserving resources

Living in a world where resources are in short supply



How is this sub-trend evolving?



From

To



Mainstreaming of the
desire to save
resources



Increasingly high
expectations of
sophisticated solutions
for conserving
resources



**Intermarché,
France**



War on waste

Reducing the wasteful
byproducts of
consumption



How is this sub-trend evolving?



From



Growing consumer desire for products that are easily recyclable/re-purposable, and designed to involve less waste in the first place.

To



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



Trash Exchange, Mexico



Niche concerns

Working to protect an environment under stress



How is this sub-trend evolving?



From



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

To



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



Niche concerns in action



Tata Harper,
Canada



Fair treatment

Treating animals and people fairly
throughout the production process



How is this sub-trend evolving?



From



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

To



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



Consumer
Lifestyle Trends

Fair treatment in action



Waitrose, UK



Totally transparent

Expectation of complete honesty



How is this sub-trend evolving?



From



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

To



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



Weleda, Switzerland

How dynamic are the sub –trends?



Heating up

Still warm

Cooling



Local action

Totally transparent



Heating up

Still warm


Cooling

Conserving resources

Niche concerns

War on waste

Fair treatment



1. Ensure your consumer is fully aware of what happens at every stage of your supply chain?

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

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



Shared experiences



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

Overview of the sub-trends



Fun and play

Immersive experiences

Passion and purpose

Richer rewards

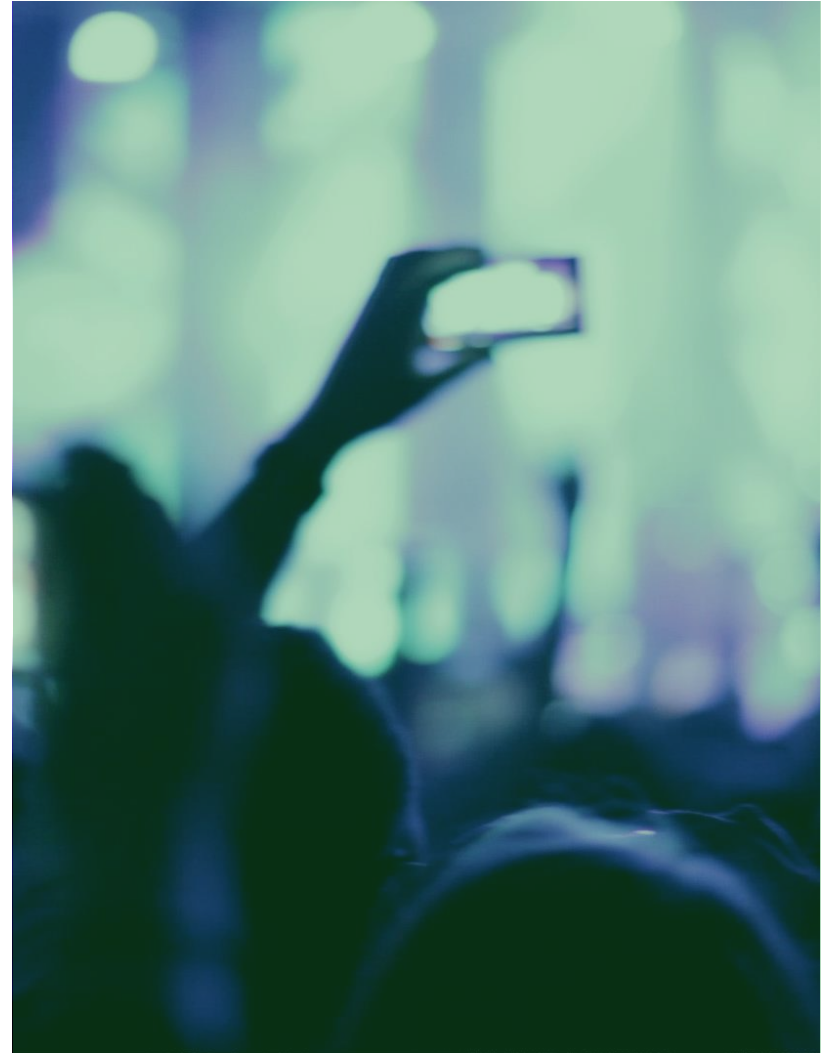
New sensations

Home-style comfort



New sensations

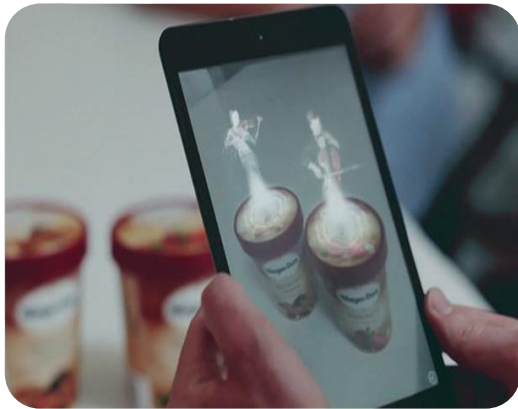
Desire to experiment with new and novel products



How is this sub-trend evolving?



From



Products that give enhanced sensory experience on multiple fronts

To



Products that facilitate new sensory journeys



New sensations in action



KFC
Choitashi
Japan

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board



Introduction

Global forces

Cultural snapshot

The Trends

Contact Us



Welcome to the Consumer Lifestyle Trends Programme

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



Consumer Lifestyle Trends



Helen King



Tom Collins



Paula Donoghue



Rory McDonnell



Grace Binchy

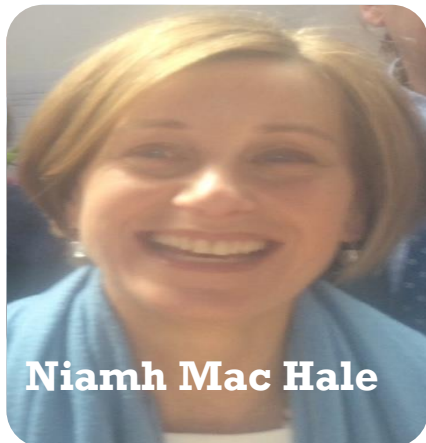


David Deeley

Consumer Insight
Trends
Foresight
Branding
Design
Innovation



Siobhan Collins

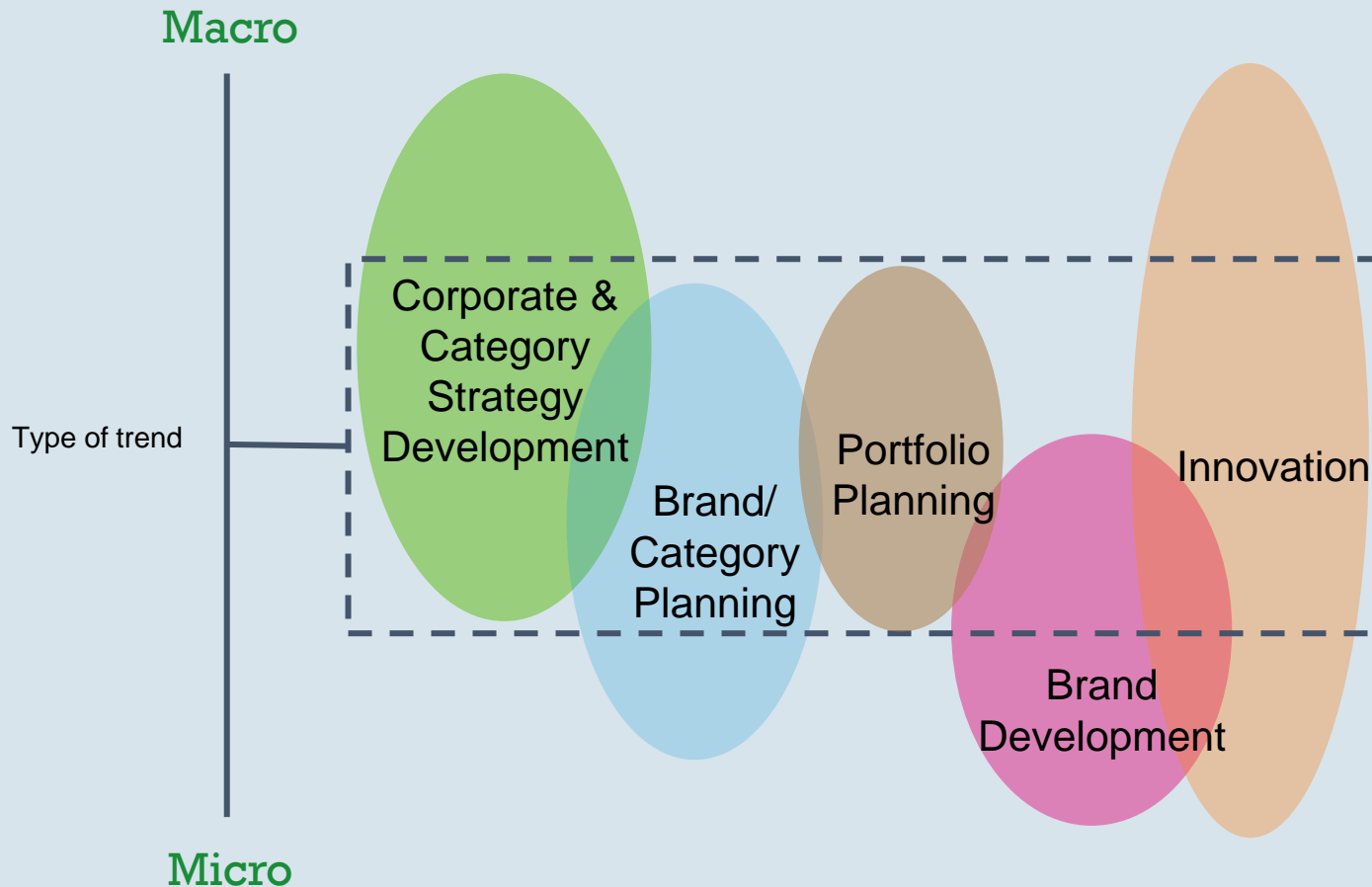


Niamh Mac Hale



Zuilmah Wallis

How can we help you use the CLT?



2015 Consumer Lifestyle Trends



Busy
lives



Shared
experiences



Responsible
living



Health and
wellbeing



Personal
value seekers



Keeping
it real

Thank You