EUROMONITOR INTERNATIONAL

Top 10 Global Consumer Trends 2019

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The Big Picture

Welcome to Euromonitor International's Top 10 Global Consumer Trends for 2019

Euromonitor reviews emerging fast-moving trends we expect to gain traction in the year ahead, providing insight into changing consumer values and priorities and exploring how consumer behaviour is shifting and causing disruption for business globally.

Each of the 10 trends follows the same format:

- Specific characteristics and how the trend manifests
- Environment
- Behaviour / motivation
- How the industry is responding
- View from one of our experts
- Long-term impact

Source: Euromonitor International

WHAT ARE WE IN 2019?

If there is a common thread linking 2019's Global Consumer Trends, it is intelligence. How we live is so centrally dependent on the choices available that the biggest issue we face is how to make sense of it all. Simplifying your options, having smooth purchasing experiences, being mindful and ultimately opting out altogether are all intrinsic.

We are becoming wiser

Everyone's an Expert expresses the switch in power between retailer and consumer. Previously shoppers relied on a certain brand or information source to get what they wanted, now companies must constantly innovate, drive prices down and streamline and aestheticise their offerings to entice shoppers.

At the root of the **Everyone's an Expert** trend is the almost compulsive need for digital consumers to absorb and share information. As internet retailing continues to increase globally, all industries will have to adapt to consumers' new demands to stay relevant.

We are becoming more self-sufficient

The focus of **I Can Look After Myself** is the preventative, consumable measures against illness, unhappiness and discomfort that people can take without having to consult a professional. They make use of apps and personalisation services to create a product uniquely for them without the need to constantly engage with social media and brand marketing. Being able to 'look after yourself' is seen as a luxury that allows people to be more versatile and expand their possibilities. Dictating, designing and personalising your life allows you to be more flexible.

We demand immediacy

Efficiency-driven lifestyles transcend instant gratification. **I Want it Now!** consumers seek frictionless experiences that mesh with their lifestyles, allowing them to dedicate more time to their professional or social lives. Central to this concern is the management of user data and a company's access to this data. The public's trust toward this access and how it will be used will ultimately determine the longevity of this trend.

We want authenticity, for show

Back to Basics for Status consumers are searching for authentic, differentiated products and experiences which allow them to express their individuality. Consumers in developed economies are re-evaluating their spending habits, moving away from overt materialism to simplicity, authenticity and individuality. As emerging economies develop further, the same pattern is likely to emerge, with consumers tiring of generic products and starting to place more value on higher quality, unique and differentiated offerings, which convey a certain level of status.

We want to impact our world

The push for a plastic-waste-free society has gained momentum over the past 12 months, and in 2019, **I Want a Plastic-free World** will grow further.

The durability of plastic packaging is being scrutinised because of plastic's polluting presence, post-consumer use, as waste in the global environment. Consumers will increasingly use their wallets to protest the irresponsible use of plastic, which could, in turn, create a virtuous circle where industry, from food and beverages to beauty and personal care manufacturers and beyond, stand to gain by improving sustainability.

We want to be thoughtful

Today's **Conscious Consumer** is flexible and chooses for the moment. What used to be the domain of ethically-positioned niche producers is now being embraced by conventional companies through higher welfare alternatives of existing products. **Conscious Consumers** are influential, and the trend will spread to others. Animal welfare concerns will evolve further and extend to other industries beyond food, beauty and fashion, to home care, home furnishings, pet food and so on. The meaning of responsible business is shifting, demanding companies improve minimum animal welfare standards even for regular products.

We are intentional

The fear of missing out has now given place to the re-appropriation of self-time as people find joy in missing out. To protect their mental wellbeing, **Finding My JOMO** consumers want to be more intentional with their time, to set their own boundaries and be more selective in their activities. Globally, millennials feel the need for this re-empowerment more strongly than other generations. Planned disconnection provides them with time to reflect and to act freely, focusing on what they really want and enjoy doing. And in developing markets, reliance on the internet may be the origin of higher stress levels, especially when being connected is so linked to essential services.

We can really be together, digitally

The growing ubiquity of high-speed internet, particularly the acceleration of mobile internet, is driving live interactive experiences online and facilitating collaboration on large files instantly. From dating to education, we have grown to expect more authentic, life-like interactions online. As our technological capabilities and comfort using them grow, so will the range of things we can do **Digitally Together**.

Our growing comfort with sharing our friends, location and activities online will only lead to the development of new ways to engage. As our technological capabilities and comfort using them grows, so will the potential of what can be created or experienced together, remotely.

But we have never been more alone

Globally, the number of single-person households will outpace the growth of all other household sizes, and baby boomers are expected to comprise a large share of this growth. While baby boomers may have been well known for the high rate of divorce among their cohort, many of those in the younger generations have rejected marriage and cohabitation altogether. They are setting the stage for a trend that is bound to outdate their generation. People across the world are bucking the stigma of living alone and embracing their independent lifestyles and enjoying **Loner Living**. The Pew Research Center estimates that by the time today's US young adults turn 50, 25% of them will have been single their whole life.

We are ageless

Age Agnostics don't hold with conforming to demographic expectations—everyone connects. The key to winning and retaining loyalty and trust is to develop products and services that are universally accessible even while designed with older people in mind. Baby boomers have much more in common with the values and priorities of millennials and younger generations then many realise, and it is this inclusive mindset that needs to be better understood and catered for in the future. Universal and welcoming, it is about taking care of oneself and focusing on prevention and enjoyment of life. Balancing mental, spiritual and physical is the priority here.

Gina Westbrook
Director of Consumer Trends

AGE AGNOSTIC

Older people want to feel, behave and be treated as younger

The boundaries of old age are shifting as people live longer and take better care of their health, appearance and wellbeing. Age Agnostics no longer have a passive attitude towards ageing, and this is especially true in wealthier developed countries with decent healthcare systems and social conditions.

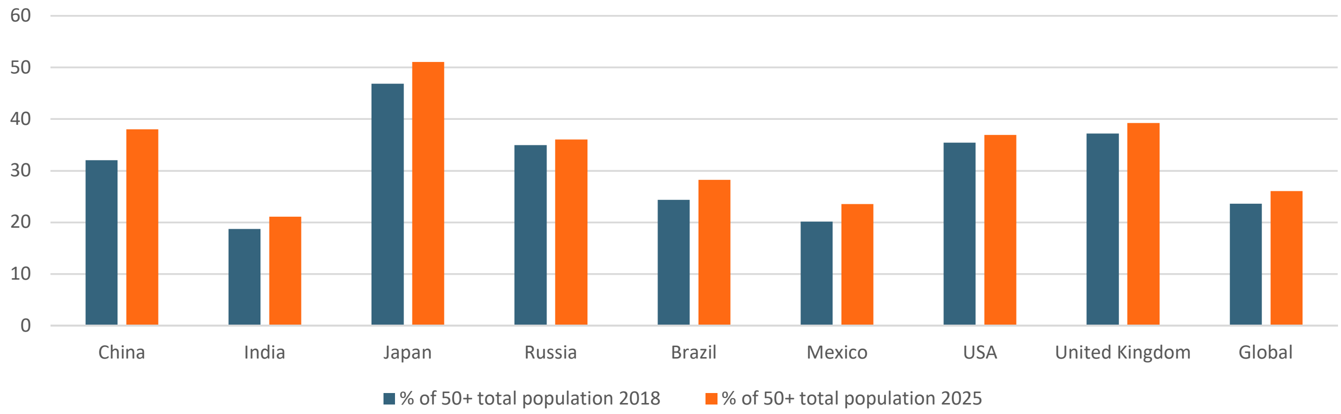
Baby boomers (born between 1946 and 1964) are the generation with the most disregard for age. They do not think of themselves as old, and they most definitely do not want to be referred to in those terms. For example, more affluent baby boomers have been shown to be just as obsessed with technology, including tracking the latest apps and smart devices, as millennials.

Moreover, the oldest baby boomers—often referred to as the 'forever young' generation—are now going into their 70s and are redefining ageing. These are a new kind of mature consumers—a diverse group who enjoy the same things as their younger counterparts and want to continue to be themselves for as long as possible. This means they want products and services that help them stay as youthful as possible in mind and body, not trying to change things—just look and be the best they can.

As longevity rates soar, societies are ageing rapidly

The driving force behind Age Agnostic is the fact that people are living for much longer, want to remain active, contribute to society and maintain an ageless attitude towards life. Almost every country in the world is showing growth in the number and the proportion of older persons relative to the general population, as shown below for selected markets. For example, in Japan, by the year 2025, half of the population will be over 50 years old, and even in 2018, over two million Japanese citizens were over 90 years old.

50+ Years a Rapidly Growing Population Segment 2018 / 2025



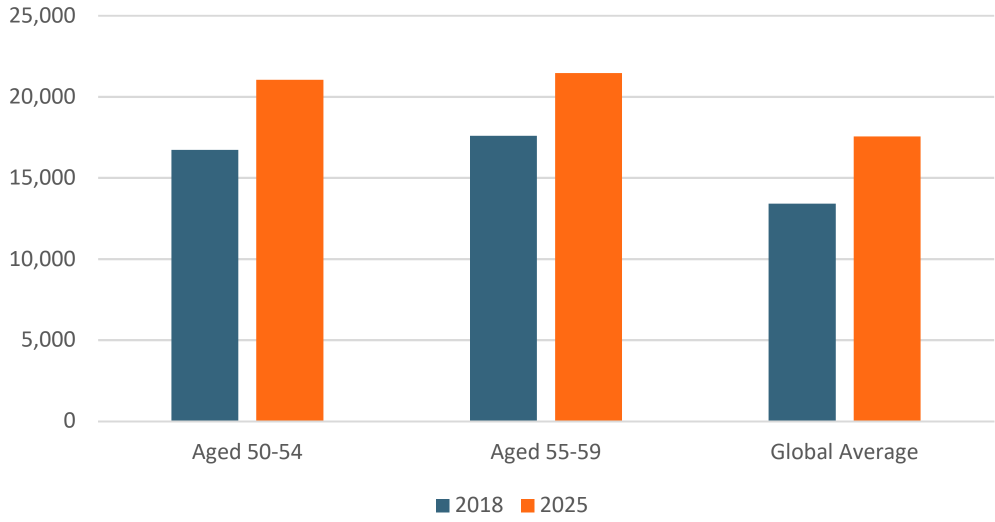
Source: Euromonitor International

Senior spending power offers huge growth potential

Overall, later lifers are in better financial shape than the rest of the population, boasting the highest spending power among all age groups. In 2018, those aged between 50–59 years—many of whom are still working, have reached senior positions or have inherited wealth from their parents—will earn an average of USD17,164—a full 28% above the average earnings of all age groups (USD13,400). At USD17,600, the 55–59 age group earns more than those in their early 50s.

This high average income level of these two age groups will grow 26% and 22%, respectively, through to 2025, making this demographic a highly profitable target group for marketing discretionary purchases. For example, from holiday homes and luxury watches to nutritional supplements and beauty care treatments and a vast spectrum of premium products and services.

Average World Annual Gross Income in USD 2018 / 2025



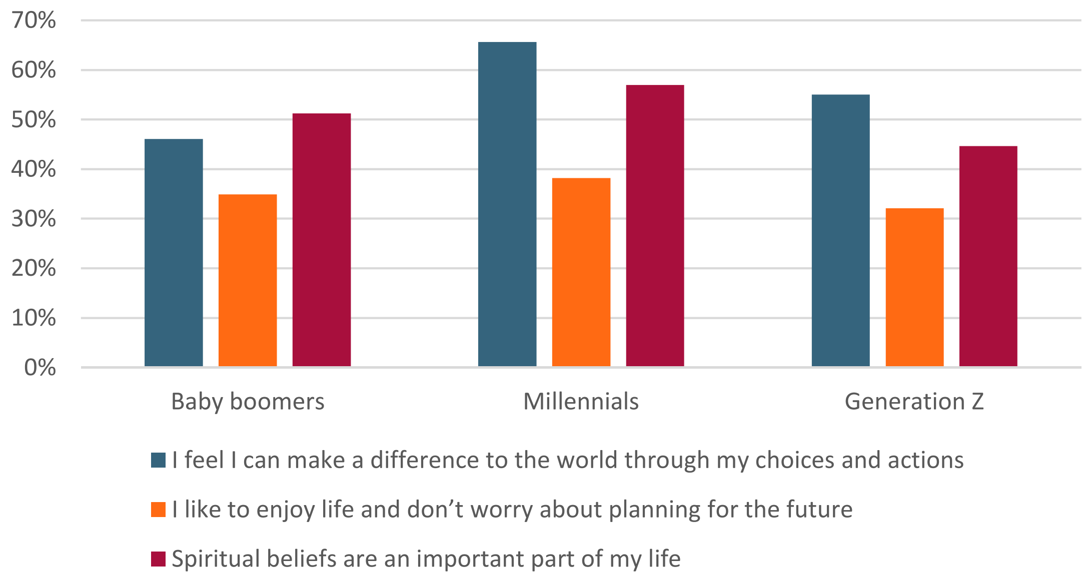
Source: Euromonitor International

Enjoyment of life and spiritual beliefs are prioritised for older generations

The Age Agnostic trend among older generations is strongly reflected in the desire among 35% of baby boomers currently between 54–74 years old who agree or strongly agree with the statement that they want to enjoy their lives and not worry about the future. This proportion is surprisingly even higher than generation Z and close to millennials 38%.

While not as high a rate compared to younger generations, it is nonetheless striking that nearly half (46%) of baby boomers surveyed believe they can make a positive difference to the world through their choices and actions. This positive attitude underlines the fact that people do not want to age 'passively' but rather to contribute back to society throughout their lives.

Values and Attitudes Across Generations



Source: Euromonitor International's Lifestyles Survey (2017)

Response to Age Agnostic

Flight Centre New Zealand

A growing trend towards 'senior gap years' and other experiential travel by baby boomers provides opportunities for travel service providers.

Sean Berenson, Product Nation Leader, Flight Centre NZ, says baby boomers are more confident, discerning and adventurous about travel than the generations before them. "For a growing segment there is now a greater appetite for tailored experiential travel," Berenson says. "Senior travellers now want to go on food and wine adventures, river cruises, or self-drive journeys where they have the freedom to simply hit cruise control and navigate their own way."

Even luxury travellers are often strongly motivated by an internal transformational journey and seek authentic experiences that reach a deeper emotional level and align with their own personal values, passions and aspirations.

Coboc Germany

Electric bikes are very practical, desirable and frequently beautifully designed products that appeal to all ages. E-bikes are especially helpful in encouraging the older generation to stay energetic without putting strain on the body and are known to maintain cardio and muscular fitness, bone and functional health. Where the traditional bike can be strenuous, e-bikes have a built-in battery to help the rider on more difficult hills or terrain.

A leading brand Coboc, for example, designs e-bikes that are remarkably lightweight with easy and intuitive handling.

Source: Coboc

The psychological benefits for an ageing population are also huge as it makes it easier for people to go out and socialise. According to a leading UK outdoor retailer, Halfords, 62% of e-bikes in the UK are sold to people over the age of 55. Older cyclists are also well-informed on bicycle maintenance, repairing punctures and fixing mudguards, a survey by the retailer found.

Kampung Admiralty Singapore

Singapore launched its first public housing project to co-locate childcare and senior centres in one integrated development, aimed at encouraging inter-generational bonding. A 'vertical village', it includes studio apartments for seniors in the upper levels, as well as healthcare, social, commercial and other amenities, and supports intergenerational bonding and promotes active ageing in place.

Cognifit US

There has been a steady rise in apps using creative, highly visual mental training exercises to help retain and develop cognitive skills such as information processing, spatial orientation and working memory. Cognifit, a leading digital health company headquartered in New York, has web and mobile exercises using stimulating games where participants can regularly train and monitor memory, concentration levels and other essential everyday cognitive skills. These are definitively Age Agnostic products that will continue to resonate across multiple generations including seniors.

EXPERT VIEW

Emotional treatment of ageing is key

We are moving towards an age agnostic era for consumers and manufacturers, and other service providers must acknowledge it and make their products more universal and welcoming. People do not want to feel old. It is all about the emotional treatment and handling of ageing.

To win now, it is less about conceptualising consumers in obvious ways but rather embracing the openness of accepting everyone in creating universal design across generations. Businesses should address the ageing demographic in subtle and nuanced approaches, moving away from sub-segmenting consumers and marketing to them as old.

For example, healthcare and holistic products and digital apps to monitor activity and diet are age neutral. It is about taking care of oneself and focusing on prevention and enjoyment of life. The mental, spiritual and physical balance are priorities for older people and millennials.

ZANDI BREMNER
Head of Client Innovation, Consulting Research
Euromonitor International

Outlook for Age Agnostic

Age Agnostic ways of thinking and purchasing among older consumers is a dynamic and evolving trend that will surely resonate more and more in the future as societies get older and people live longer. The key to winning and retaining the loyalty and trust of this ageing demographic is to develop products and services that are universally accessible even while designed with older people in mind. Baby boomers have much more in common with the values and priorities of millennials and younger generations than many realise, and it is this inclusive mindset that needs to be better understood and catered for in the future.

BACK TO BASICS FOR STATUS

Less is more

Consumers are rejecting the mass-produced and generic and in 2019 will favour products positioned as simplified, back to basics and of better quality, with an implied level of status. From the rise of 'locavores' seeking hyperlocal food, to eco-luxe glamping holiday experiences, from craft spirits and beer to homemade baby food and artisan beauty, consumers are searching for authentic, differentiated products and experiences which allow them to express their individuality. 'Terroir' is no longer limited to wine and coffee but is becoming an increasingly prominent feature as consumer sophistication and expectation grows.

Shifting consumer values favour authenticity

Globalisation has allowed for more and more products to become commoditised and has resulted in a paradigm where consumers know that they can get almost any type of product from anywhere in the world, at any time, at a relatively low cost. From out-of-season fruit and vegetables being available all year round, to fast fashion offering value for money apparel, or low-cost airlines facilitating travel on a shoestring budget, middle-class consumers in developed markets live in a society where they can access almost anything, instantly. However, the financial crash of 2008 served as a reminder of the risks of growing too much, too quickly. Consumers in developed economies are re-evaluating their spending habits, moving away from overt materialism to simplicity, authenticity and individuality.

Trends in food and drink perfectly reflect the shift of Back to Basics for Status. Buying hyperlocal food is growing in popularity for a range of reasons including that it supports local businesses, food is fresher and tastes better, it reduces the environmental impact by eliminating 'food miles' and may offer better value for money as it encourages the consumption of in-season fruit and vegetables.

Key Craft Spirits Markets 2017

Country	Litres	Volume
Canada	2.5mn	1.25
US	52.0mn	2.6
UK	5.0mn	1.5
Germany	7.2mn	1.25
Finland	300,000	1.3
South Africa	1.9mn	0.5
Australia	1.0mn	1.5

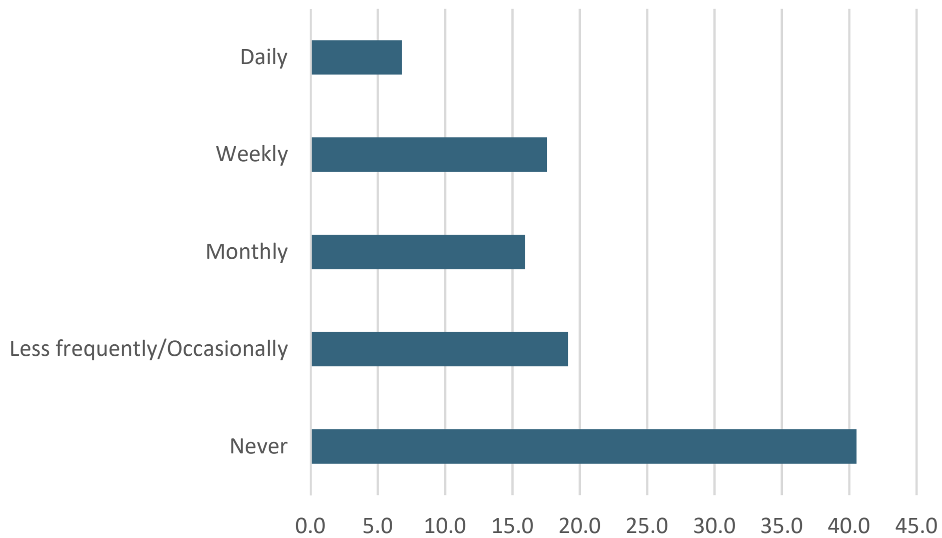
Source: Euromonitor International

The trend is mirrored in other categories. The rise of craft beer is well documented and there is a growing trend for craft spirits, set to grow further in 2019. Spirits from micro-distilleries are increasingly favoured for their taste innovation and experimentation, favouring of local ingredients, hand-crafted image and solid grounding in a location and origin. The alcoholic drinks industry is largely lifestyle-driven, and craft spirits is another manifestation of this, implying a certain social status and set of values for those who choose to buy craft.

DIY beauty products are becoming the norm

As Euromonitor's 2018 Beauty Survey highlights, almost half of consumers globally claim to use Do-It-Yourself beauty products at least once a month, reflective not only of the desire for customisation and personalisation but also of a wish to take back control over what we eat, drink and put on our skin. This is partly a response to recent controversies relating to both undesired ingredients in food and other products and the desire for simplicity, ensuring that only the essential ingredients are kept, with everything else stripped out.

41% of Respondents Globally Claim to use DIY Beauty Products at Least Once a Month



Source: Euromonitor International's Beauty Survey (2018)

Response to Back to Basics for Status

Tito's Handmade Vodka US

While spirits produced by micro-distillers are becoming increasingly frequent across a range of mature markets, the trend began in the US and is most developed there. The most prominent example of a craft spirits brand is Tito's Handmade Vodka. While the company originally started distilling in 1995, the brand started to gain in popularity to the point that, in 2018, it was one of America's top-selling vodka brands, as well as being exported globally. With a strong grounding in Austin, Texas, a clear emphasis on the hand-made, artisanal production process and a prominent brand story and identity highlighting the entrepreneurialism of its founder, Bert Beveridge, its rise reflects the demand for authentic, original products grounded in a sense of place as well as a rejection of the mainstream offerings of the multinationals.

Source: Tito's Handmade Vodka

Mauritius Conscious Mauritius

Back to Basics for Status also manifests in the travel industry. Since 2016, Airbnb has offered Experiences, reflecting the growing desire for authentic travel as an alternative to the package holiday. Less widely known, Mauritius Conscious offers tailor-made holiday experiences in the Mauritius, with a focus on the local and authentic, and with a high importance placed on eco-friendly travel. This sustainable tourism provider offers eco-friendly glamping, with the chance to taste local food and drink, meet local people and immerse travellers in island culture, while ensuring that no harm is done to the environment. The company sold its first tailored, sustainable self-drive holiday package in 2017 and offers travellers both an alternative to standard resort holidays on the island, as well as a chance to improve the increasingly challenging environmental situation in Mauritius, itself brought about in part by high levels of tourism.

Source: Mauritius Conscious

Delhaize Belgium

Source: Delhaize

Hyperlocal food is increasingly demanded by Back to Basics for Status consumers, and in Belgium, one retailer has found a radical approach to satisfy demand. Since 2017, Delhaize has reduced the 'food miles' of much of its fruit and vegetables to almost zero in one of its stores by adding a 360-sqm urban farm, where it grows produce including tomatoes, lettuce and strawberries. The fresh produce is harvested in the morning and taken down to the store for same-day purchase. Although currently only on a small scale, this type of solution from one of Belgium's largest retailers is acknowledging the growing demand for fresh, hyperlocal food with a low environmental impact.

LOLI Beauty US

The beauty industry is also experiencing innovation related to the Back to Basics for Status trend. US-based LOLI Beauty, officially launched in March 2018, offers both ready-to-use, as well as personalised beauty products through its Raw Collection range. The brand offers Blend-It-Yourself customisation and uses sustainable, food-grade ingredients as well as compostable or reusable packaging. This gives consumers the tools and sustainably sourced ingredients to mix their own personalised and pure skin care recipes in their home. Consumers can assess more comfortably the quality of the ingredients in their beauty products, and this launch allows for complete transparency about exactly what is contained in products that they put on their skin.

Source: LOLI Beauty

EXPERT VIEW

Looking for simplicity

As everyday life is becoming even more hectic, consumers' desire for simplicity is expected to progress within beauty. We've seen heightened interest in natural healing propositions, traditional herbal remedies and naturally healthy ingredient alternatives.

Demand for products that use natural ingredients has also been rising. 29% of consumers are looking for all-natural ingredients in skin care products, while ingredient transparency is sought by 19% of consumers according to the Euromonitor International Beauty Survey in 2018. Brands are responding to consumer demand by minimising the number of ingredients in product formulations. For the beauty brand SW Basics, simplicity is a core philosophy. All their products list how many ingredients they contain (five or less) on the front of the packaging.

The desire for transparency is inspiring new models for delivering quality cosmetics minus mark-ups, as featured by Public Goods and Brandless. Each company sells direct-to-consumer which allows cut down on supply chain costs and offer affordable products at the same high level of quality.

KSENIIA GALENYTSKA
Senior Analyst, Research
Euromonitor International

Outlook for Back to Basics for Status

The consumer desire to go Back to Basics for Status will be further amplified in 2019 and beyond. Globalisation offers infinite opportunities for a growing proportion of the population and will facilitate future growth and prosperity. However, as emerging economies develop further, the same pattern is likely to emerge, with consumers tiring of generic products and starting to place more value on higher quality, unique and differentiated offerings, which convey a certain level of status.

From the development of large-scale urban farms, such as the new 250-acre farming district in Sunqiao, Shanghai, to retailers such as Morrisons in the UK actively seeking to expand its range of local produce through the Local Foodmakers initiative, industry will continue to adapt to this growing consumer trend and help it to reach its full potential.

CONSCIOUS CONSUMER

Being mindful in your buying

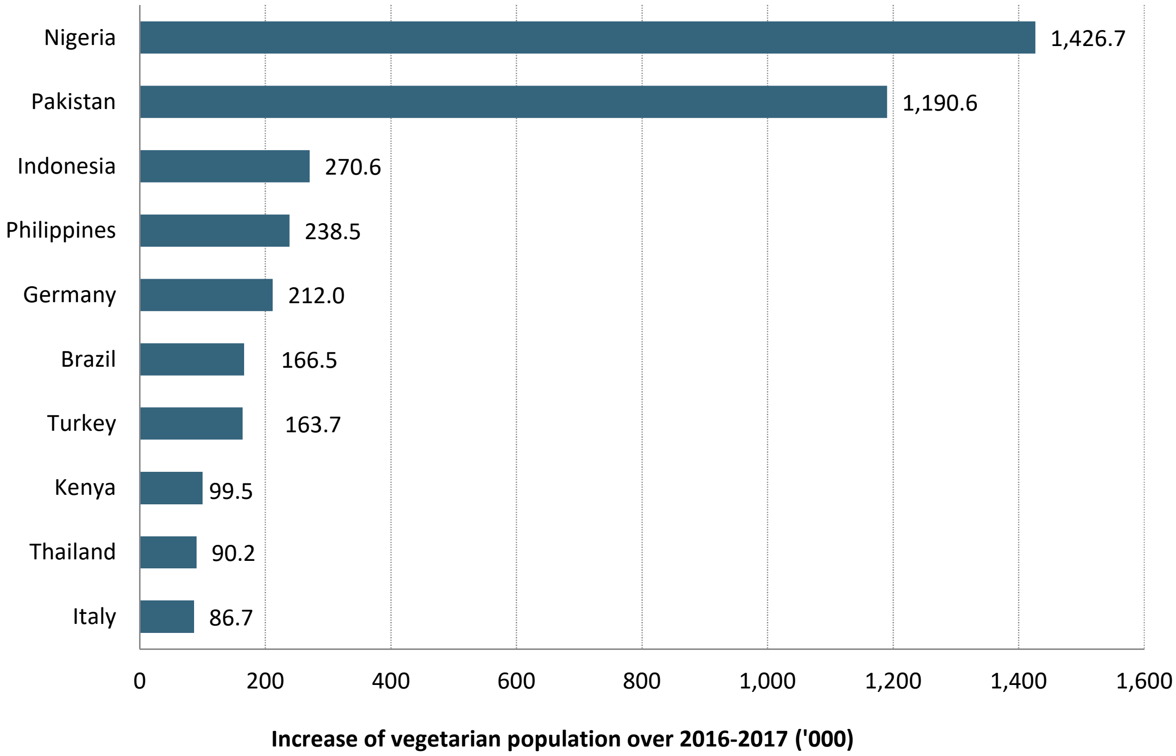
Conscious Consumers are mindful consumers, seeking out ways to make positive decisions about what they buy and look for a solution to the negative impact consumerism is having on the world. This respectful and compassionate approach to consumption embraces mindfulness of other human beings, animals and the environment. Animal welfare has gained momentum in the mind of Conscious Consumers recently and this is the focus here.

Animal-friendly rising fast in developed economies in 2018

Veganism, the practice of abstaining from the use of animal products for any purpose, was once regarded as confined to extremists but is increasingly adopted by a wide range of people. They range from the health-conscious to those concerned with animal welfare to those who see how the environment is negatively affected by industrial meat production. Social media has brought veganism to the forefront of consumers' minds. It is for everyone and has become cool, endorsed by celebrities such as Jennifer Lopez, Miley Cyrus and Chinese pop singer Long Kuan. It is no longer seen as a choice for life with total eradication of animal-based products with today's Conscious Consumers having a more flexible approach to their consumption and choosing to be vegan—or flexitarian—for one meal, one or two days a week. A plant-based diet and concern for animal welfare is part of the greater healthy and ethical living trend shaping Conscious Consumers' choices nowadays.

Though this is true for developed economies, in emerging markets there is a deep-rooted perception of meat as good nutrition and a sign of prosperity. But even in these developing regions, in countries such as China, Indonesia and India, young, urban, middle- and high-income consumers are also advocates of the new Conscious Consumerism trend.

Vegetarian Population—10 Countries with the Biggest Increase During 2016–2017

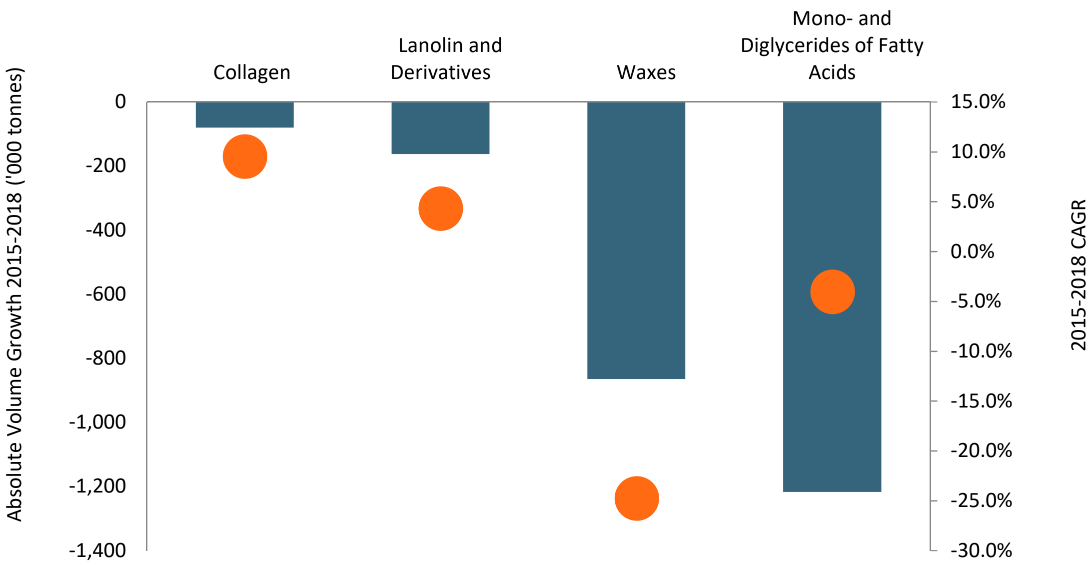


Source: Euromonitor International

Conscious Consumers not only want to eat meat and dairy alternatives, they choose clothes that are leather- and fur-free and use non-animal-derived ingredients in their beauty and personal care products. They oppose animal testing for cosmetics and pharmaceutical products, as well as farming methods such as the use of antibiotics in animal-rearing and mega or factory farms.

The rise in this more conscious consumption approach has consequently seen increasing demand for plant-derived ingredients such as plant extracts, essential oils, xanthan gum and vegetable waxes in beauty products, while animal-derived ingredients such as collagen and lanolin are losing their popularity.

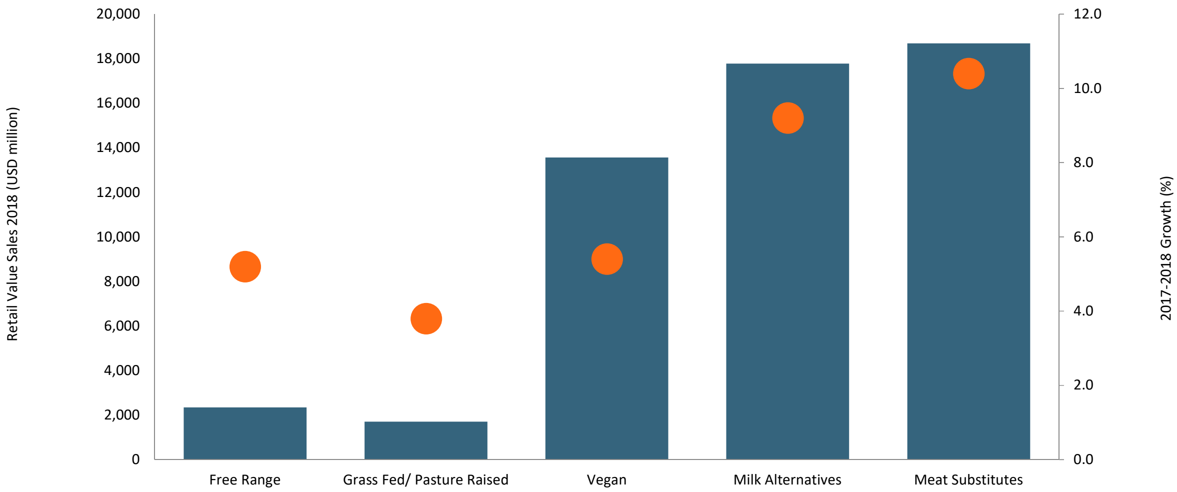
Ingredients of Animal Origins in Hair Care Strongly Declined Globally 2015–2018



Source: Euromonitor International

The increase in the number of vegetarians and vegans has also contributed strongly to the increasing demand for animal welfare label sales in food and beverages. Product features such as cruelty-free and not tested on animals, free range and grass fed / pasture raised increasingly influence purchasing decisions of Conscious Consumers. Furthermore, milk alternative and meat substitute sales continue to grow.

Selected Animal Welfare Friendly Categories—Growing Sales Globally During 2017–2018

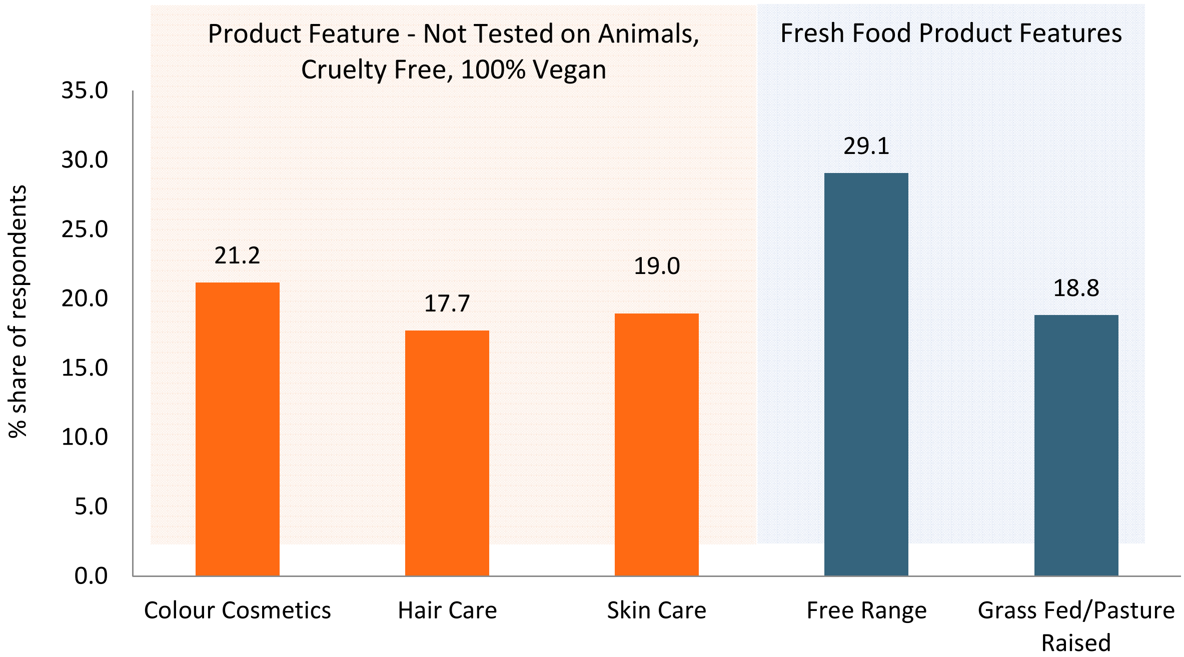


Source: Euromonitor International

Animal-friendly behaviour

As Euromonitor's Lifestyles and Beauty Survey data highlight, consumers are becoming increasingly sensitive to animal welfare and this is impacting their shopping habits. For example, almost one-third of respondents are looking for the product feature 'free range' in fresh food products, and for more than one-fifth of respondents, the product feature 'not tested on animals, cruelty-free and / or 100% vegan' influenced their purchasing choice in colour cosmetics.

Product Features Influencing Purchasing Decisions of Consumers when Buying Beauty Products and Fresh / Unprocessed Food Products



Source: Euromonitor International

Response to Conscious Consumers

KFC in South Africa

Vegetarianism / veganism is going mainstream and exists in parallel to the consumption of meat products.

Source: KFC

Today's Conscious Consumer is flexible and chooses for the moment. As a result, what used to be the domain of ethically-positioned niche producers are now being embraced by mainstream foodservice companies who can capture Conscious Consumers through higher welfare alternatives of existing products. KFC is an established truly meat-based fast food company; the company name, Kentucky Fried Chicken, is the brand. It has successfully launched the Veggie Burger for example in Canada and New Zealand, with a vegetable-based burger patty (not vegan, as it contains cheese and mayonnaise), and it is advertised with pride. Following consumer reviews, the taste is appealing and resembles real chicken.

To include the Veggie Burger in the menu of selected KFC restaurants in South Africa was a bold move for the leading fast food chain in the country. South Africa has heavily invested in meat production and sales, and the popularity of fried chicken is particularly widespread among consumers.

KFC's animal welfare initiatives continue, with the company currently testing faux fried chicken in the UK, mimicking its signature product with herbs and spices minus the meat, hoping to launch this vegetarian option in the country in 2019.

The Body Shop UK, European Parliament, Cruelty-Free International

More and more countries across the globe are moving towards ending animal testing in cosmetics. For example, Taiwan passed a law banning cosmetic testing on animals in 2016 and it will go into effect


Source: The Body Shop

in 2019. However, around 80% of countries worldwide still allow animal testing and the marketing of cosmetics tested on animals. China represents a huge market that not only does not ban animal testing but requires it for any cosmetics being imported into the country.

Spearheading a global ban on the testing of cosmetics on animals, the European Parliament voted for the EU and its Member States to work towards a UN convention against the use of animal testing for cosmetics in May 2018. The resolution is backed by The Body Shop and NGO Cruelty-Free International, with The Body Shop reporting in 2018 to have reached eight million signatures in its campaign against animal testing with Cruelty-Free International.

Source: L'Oréal

L'Oréal France

In 2018, L'Oréal Professionnel launched a new line of vegan and 100% plant-based salon hair dyes called Botanēa in Western Europe. Botanēa is a 100% herbal hair colour composed of three ingredients. Cassia, grown in several regions of India, is used as an adjuster and luminiser; Henna leaves release warm copper colours; Indigo leaves deliver colour results varying from blue to purple. When mixed with hot water, these three powders enable colourists to create a huge palette of shades and tailor them to each client. L'Oréal Professionnel highlights how it combines the best of nature and scientific research with this product.

ASOS UK

UK-based internet retailing company ASOS ships a wide range of apparel and footwear, beauty and personal care to over 200 countries globally, stocking 800 third-party brands, as well as its own private label offerings.

Source: ASOS

In 2018, the company revealed plans to ban any product from the site that has been made using feathers and down, mohair, silk, cashmere or bone, teeth or shell. The ban, which will come into effect at the end of January 2019, comes after ASOS stated that it would join more than 140 international retailers in their promise to stop selling products that have been manufactured using mohair. Consumers are developing more conscious shopping habits, decreasing demand for fashion that "abuses animals, from goats to geese to silkworms".

EXPERT VIEW

Ethical goes mainstream

The quest for improved transparency and purpose is forcing beauty companies to cater to a more ingredient-savvy consumer who wants to stand out through their product choices and the causes they believe in. While Lush and The Body Shop have been advocates against using animal derived ingredients, ethical ingredient sourcing is becoming more the norm in the beauty industry. Large companies, like Unilever, and small socially active brands are getting the attention of younger cohorts.

Milk Makeup, Kat Von D and Unilever-owned brand Hourglass have reformulated their products to 100% vegan standards. Milk Makeup's Kush High Volume mascara, launched earlier this year, is formulated with cannabis oil instead of beeswax which indicates the potential for exploring many untapped alternatives for replacing animal-derived ingredients. With the focus on 'clean' beauty, cruelty-free and most notably vegan products will be increasingly sought after. Despite the hurdles of a non-regulated market, the consumer voice on the subject will make further action from brands imperative in the future.

IRINA BARBALOVA
Global Lead, Health and Beauty, Industry Manager
Euromonitor International

Outlook for Conscious Consumer

The Conscious Consumer is here to stay. In the short, medium and long-term, mindful consumption, whether full-time or part-time, looks set to rise. Conscious Consumers are influential, and the trend will spread to others. Animal welfare concerns will evolve further and extend to other industries beyond food, beauty and fashion, to home care, home furnishings, pet food and so on. The free and liberal lifestyle that is gaining traction among modern consumers today will see more and more Conscious Consumers adopting a flexible approach to veganism. This eliminates the weight of labels and allows individuals to find their own ways of embracing a more plant-based diet and to choose more plant-derived products.

With consumers increasingly concerned about where products come from, the meaning of responsible business is shifting, demanding companies to improve minimum animal welfare standards even for regular products. Furthermore, rising consumer affluence and awareness will boost demand for higher welfare, premium products. Investing in animal welfare is consequently a key tool for adding value in today's highly competitive business environments.

DIGITALLY TOGETHER

Proximity is no longer a boundary

Over the last decade, technology has evolved from facilitating communication to enabling multi-dimensional interactions and collective experiences. This evolution will continue to shape how we connect and collaborate with our friends, colleagues and, increasingly, strangers—creating and experiencing things Digitally Together while we are apart.

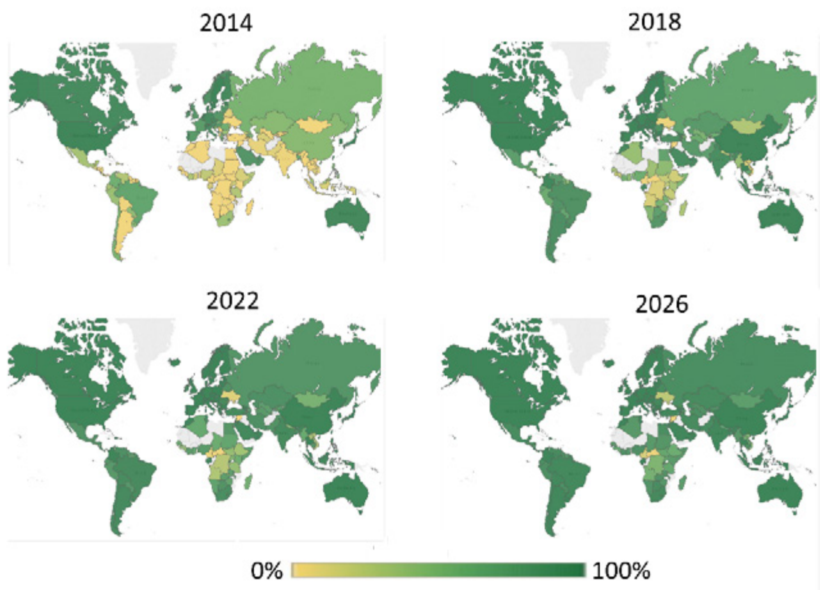
Professional communication has evolved to include video and text chatting, real-time document collaboration, and virtual meetings with participants from across the globe. Yet some industries have had to contend with technological and regulatory barriers that we are just now overcoming, opening the door for industries such as healthcare, education, and multimedia production to move more of their collaboration online.

In our personal lives, we are using online platforms to share experiences to create and engage in activities together. For the millions of online game enthusiasts and virtual world participants, virtual platforms serve as social hubs just as important as in-person ones. From dating to education, we have grown to expect more authentic, life-like interactions online. As our technological capabilities and comfort using them grow, so will the range of things we can do Digitally Together.

Faster internet fulfilling needs of global consumers

The growing ubiquity of high-speed internet, particularly the acceleration of mobile internet, is driving live interactive experiences online and facilitating collaboration on large files instantly. Mobile internet with LTE or faster speeds is still spreading across the Africa / Middle East and Asia Pacific regions. These regions will account for 88% of population growth over 2018–2026, leading to a vast increase in the number of people connecting online globally. As high-speed internet expands across the developing world, more advanced nations are investing in the next level of communications infrastructure that will facilitate fibre-optic broadband and 5G mobile internet, allowing speeds of up to one gigabyte per second. These speeds will continue getting faster.

Share of National Populations with LTE Mobile Internet or Faster 2014–2026



Source: Euromonitor International

Advances in digital connectivity are increasingly important as people continue to spread out around the world without wanting to lose touch. Families are living and travelling further away from each other and from friends. From 2010 to 2017, the number of international migrants grew from 173 million to 220 million. The upward march of international travel also supports the trend.

Social media will continue to dominate our online activity, with most people currently engaging almost every day and the number of users growing worldwide. Despite privacy concerns, users share activities, locations and companions, creating digital moments that can be looked back on and relived eternally.

These drivers are setting the stage for more dynamic ways of interacting with each other across the globe through high-bandwidth mediums such as video chatting.

While some forms of video chatting are embedded, new platforms such as Facebook Portal are improving the quality and natural feel of home-based video chatting and enabling more interactive conversations. Facebook Portal's at-home camera interface focuses on you as you move around the room and allows video-chatters to enjoy a song together or read an interactive story-book with their children.

Wearable fitness devices are also developing increased biometric capabilities, exemplified by the latest model of the Apple Watch that is equipped with an electrocardiograph sensor. These types of innovations in biometric technology, combined with improvements in large file sharing and video conferencing capabilities, are facilitating virtual medical diagnostic and treatment or 'telemedicine'. Currently, prescriptions for common ailments are often prescribed via a 'teledoctor', however, there is an emergence of chronic disease management, mental health treatment and more complex diagnoses moving to virtual care.

Being Digitally Together is also driven by our comfort around digital sharing and the growing number of things we do online for fun. The growing popularity of online gaming and online dating are models of how digital communications can transform society.

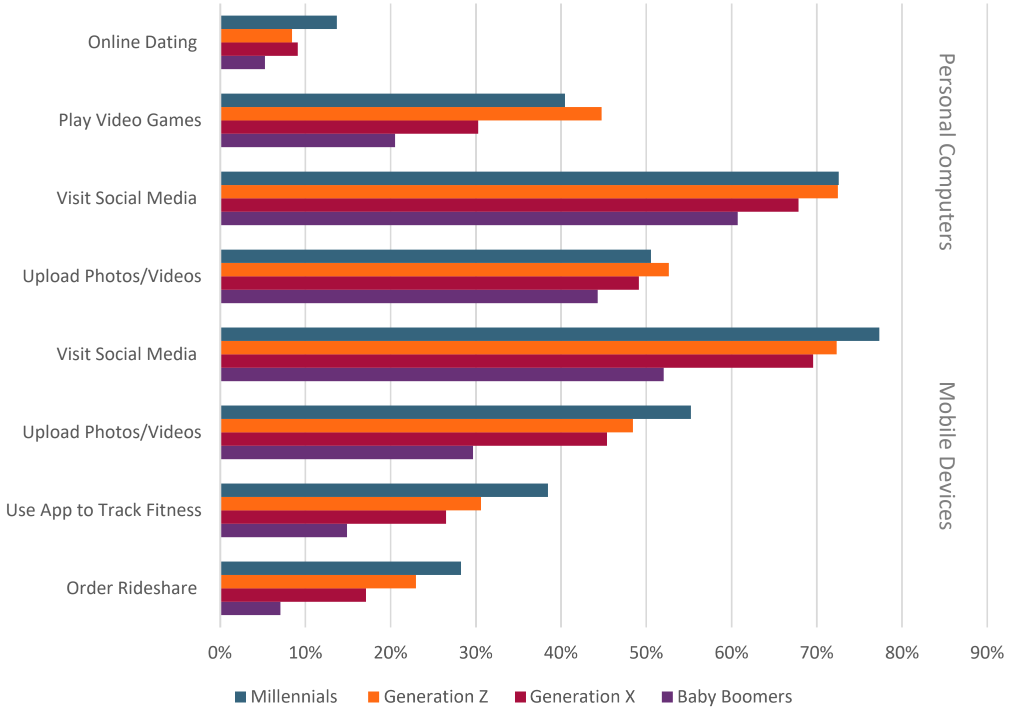
Online dating began with Match.com at the turn of the century and was somewhat taboo. Yet, today, 200 million people globally use digital dating apps monthly and dating features continue to be adopted as part of apps such as Facebook. These relationships may begin online, as in the US more than a third of all marriages begin digitally and that rate is expected to grow. Developers in Asian markets are experimenting with virtual reality dating, but it is yet to be seen how far digital dating will go.

Together behaviour

Globally, 45% of people share photos or videos weekly, up from 38% in 2015. This active sharing is also being complemented or replaced with passive sharing when we opt-in to have our personal data, such as location and activities, constantly streamed to our friends or family through apps such as Life360 and WhatsApp. We are seeing advances in artificial intelligence, predictive analytics and virtual reality that will spawn new iterations of social media or more advanced online communities.

Digital bandwidth and home security systems have evolved to allow home monitoring from mobile devices often used by parents to check on children or caretakers. Remote monitoring and control of home devices are growing in popularity, with 53% of people using their mobile phone to monitor their home in 2017, up from 35% in 2015. In the US, 13% of individuals check-in on their homes, families, or caretakers, using their phones to stay connected when they are away from home.

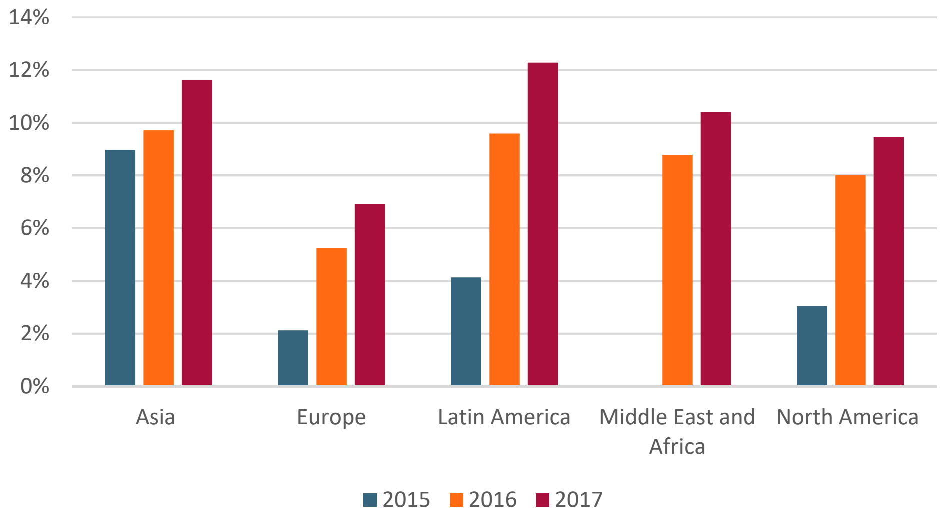
Share of Global Population Doing Activities Online Weekly by Generation



Source: Euromonitor International's Lifestyles Survey (2017)

Smartwatches and other wearable tech are growing in popularity worldwide. Mobile applications that link wearable tech to online platforms allow users to effortlessly share their activity and health data with a personal trainer, health professional or friends competing in a fitness challenge. Apps such as Stridekick that facilitates fitness tracking with friends allows users to keep track of each other digitally between in-person wellness activities.

Share of Population Owning a Smartwatch



Source: Euromonitor International's Lifestyles Survey (2015, 2016, 2017)

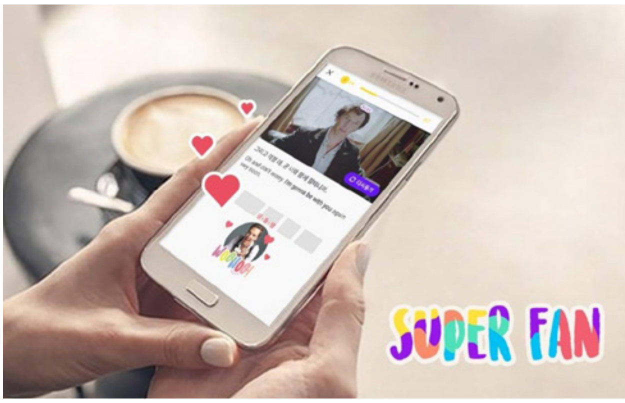
Response to Digitally Together

Oksusu South Korea

Oksusu Social VR allows users to take on a virtual avatar and move around virtual spaces and engage with other people's avatars. While in the virtual world, users can virtually watch concerts in venues, attend sporting events in a stadium, or go to the movies in a theatre, all with their friends or strangers. This creates an online community where users can meet new friends or meet up with existing friends online with the added dimension of virtual reality.

This new application, launched in South Korea, uses existing VR technology from Google and Samsung. The media content is like what may be found on other streaming sites, but the bonus of virtual interactions is adding a new element to streaming by bringing spectators together in a digital space.

Super Fan Qualson Inc, South Korea



Source: Qualson

Super Fan is an app that teaches users English by allowing them to watch videos online and crowdsource English subtitles within the online community. Using popular YouTube videos and movies, a user can either watch and teach by creating subtitles or watch and learn by reading subtitles and interacting with native English speakers.

In six months, the app gained 500,000 users and became the top educational app in South Korea, partnering with Cartoon Network to include its shows. The teaching and learning, however, are user-generated by bringing bi-lingual fans and curious learners together digitally.

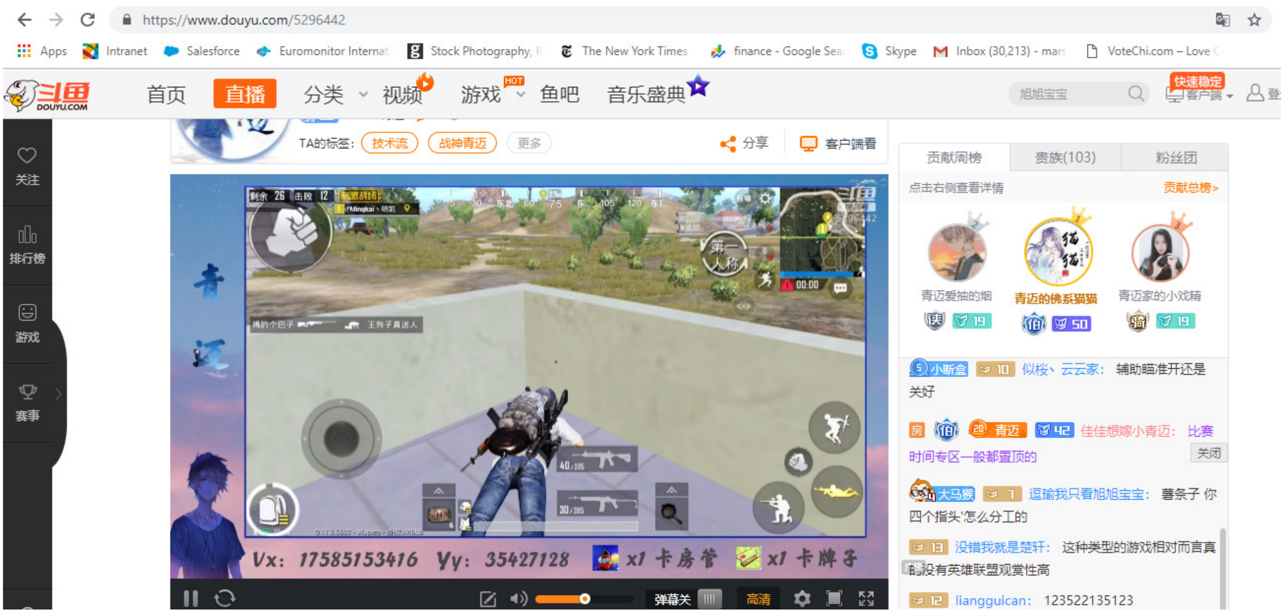
Kompoz US

Creative professionals such as musicians and filmmakers are collaborating across the globe by sharing digital files and logging on for live creative workshops. Amateurs can collaborate on playlists online using apps such as Spotify, but the pros have platforms such as Kompoz or Bandhub to meet and create songs and music with people around the world.

Kompoz has added 80,000 users, and in addition to creating music through the collaborative online platform, online bands also share and give feedback on each other's music. A key prerequisite for these online projects is high-speed internet access and effective compression software to allow large files to be shared across the globe quickly.

Douyu China

Electronic sports are evolving as quickly as internet speeds and gaming technologies improve. The emergence of spectating e-sports has added a new dimension to gaming and these new video game streaming services are growing in popularity around the world. Streaming services such as Twitch and Douyu have spiked in popularity recently as e-sports become a spectator sport like any other.



Source: Douyu

Douyu is transforming how game enthusiasts in China interact by giving them a platform to not just watch games, but to gather with friends or strangers online to talk or chat throughout a match and root for teams. Millions of users log on to watch matches of popular online games such as Fortnite, and they can interact with other viewers, share strategies and celebrate victories together, creating an online stadium.

EXPERT VIEW

VR in games will push boundaries everywhere

For the next generation of digital technologies, finding the balance between user-friendliness and technical capabilities is the main challenge. We will see the future manifest in simple forms of augmented and virtual reality (VR) as industries are making initial steps in trying to achieve the features consumers want.

VR is already being used in digital communities in Asia where participants can play and watch electronic sports online. For example, Twitch has captured the attention of gaming enthusiasts by averaging one million live participants throughout 2018, up 42% from 2017. As VR games become a reality, online communities may be the first adopters of the full manifestation of virtual reality.

Augmented reality (AR) is already popular through mobile games like Pokémon. Once it's fully developed, the technology to manipulate space in front of you on a screen could offer immense value for training, shopping and meetings. Virtual reality technology will require significant advancements in size and affordability before units can be mass produced.

MATTHEW HUDAK
Consultant, Toys and Games
Euromonitor International

Outlook for Digitally Together

Our growing comfort with sharing our friends, location and activities online will only lead to the development of new ways to engage with one another. As our technological capabilities and comfort using them grow, so will the potential of what can be created or experienced together, remotely.

Industries are also transforming quickly to adapt to demands for virtual options. As law, medicine and other high-compliance fields continue to move online, processes that require in-person visits can be replaced by digital alternatives. From government offices to hospitals, new technologies are pushing the boundaries of which types of professional interactions can be done online.

EVERYONE'S AN EXPERT

Knowledge is power

In an era where everything is available at the touch of a button, consumers now consider hyper-availability as the normal baseline for their research and shopping. Naturally, we want top quality for the lowest price. The countries that will generate the most revenue in internet retailing in 2022, according to Euromonitor, are China, Japan, the USA, the UK and India. It is no coincidence that the search term 'best' is one of the top searched words on Google in these countries in 2018.

Everyone's an Expert expresses the switch in power between retailer and consumer. Whereas previously shoppers relied on a certain brand or information source to get what they wanted, now companies must constantly innovate, drive prices down and streamline and aestheticise their offerings to entice shoppers. Rather than be seduced by brands' marketing, consumers look to each other for advice on what to buy and where, and how to get the best product for their money.

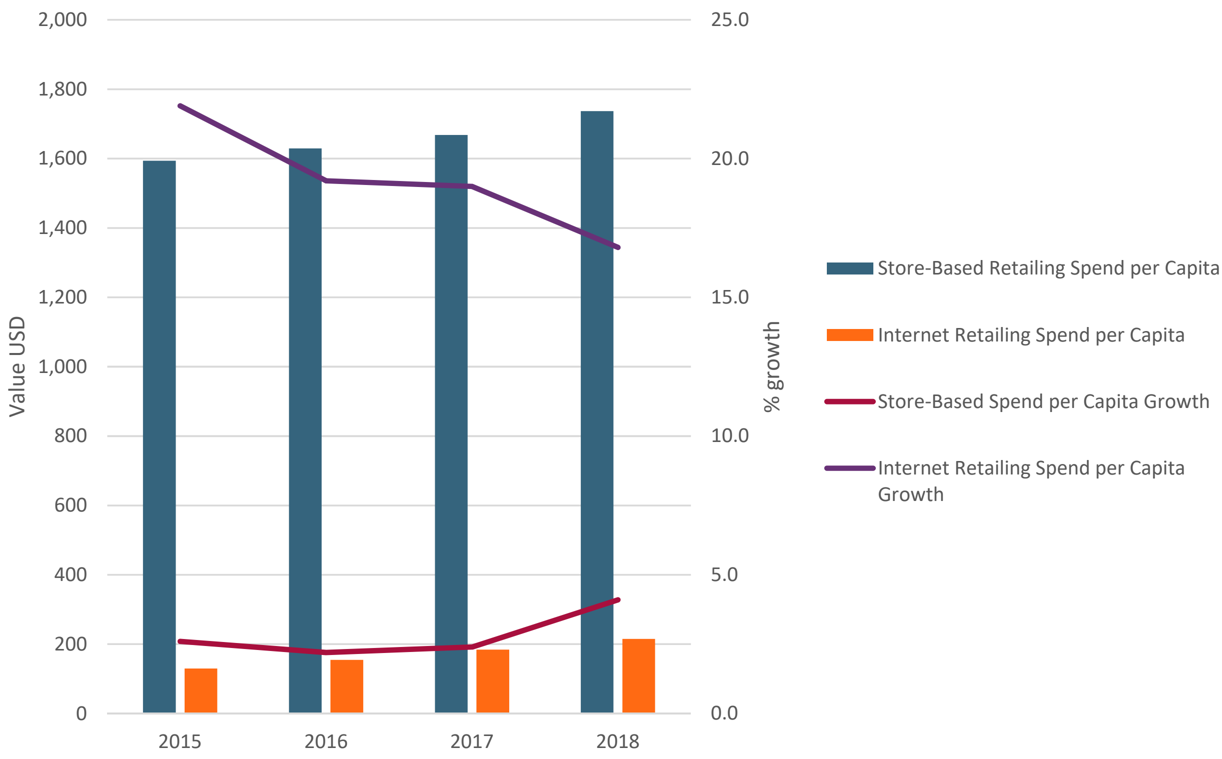
Social media has given new meaning to 'word of mouth', with consumers increasingly using Twitter, WhatsApp and Instagram to share research, offer discount codes, swap secret deals and helpful hints to find new products, and to always get the best deal. Instagram recently revealed that over 400 million users use the Stories function every day, with many Influencers now using it as their main platform.

Everyone's an Expert incorporates both the Influencers and their audiences; Influencers are paid, often vast, sums to advertise, review and model anything from clothes to make-up to hotels. Their followers, as well as digital consumers less engaged with social media, use various sources of information to research products on their path to purchase. No longer is one source of information convincing enough.

'The customer is always right' has never been truer

The Everyone's an Expert trend is the product of a more value-minded society. It originated on sites such as Amazon, where its strong product review culture has boosted the website's popularity and reputation for being reliable and trustworthy. The breadth of information available to savvy consumers means that stores can no longer get away with arbitrarily high prices or lack of transparency—the Everyone's an Expert consumer will always outsmart them. The share of internet retailing versus store-based retailing has grown in all major markets, in line with the growth in value of internet retailing.

Internet Retailing Spend Increases as Digital Consumers Become More Informed 2015–2018



Source: Euromonitor International

As consumers continue to explore, discover and leverage the vast amount of resources, information and shops online, the amount they spend online continues to increase. This customer consumes and acquires knowledge through reviews, trials and forums; their purchases are informed by their peers and Influencers.

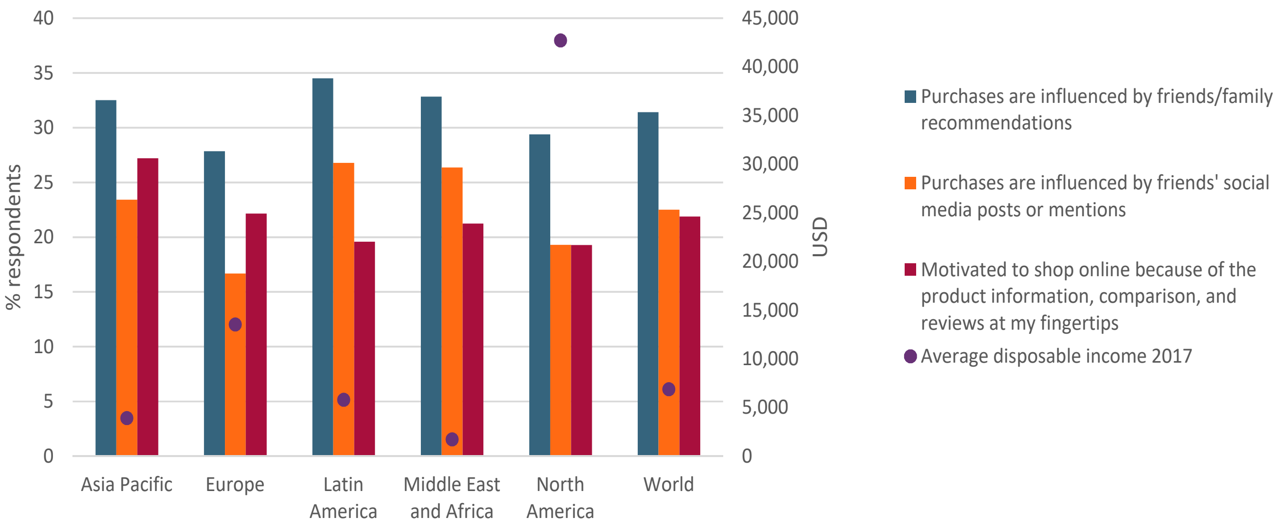
China is a trailblazer for this trend, as the country with the highest proportion of internet users and online shoppers. The highly saturated marketplace across all consumer goods means that consumers have always relied on peers' advice when it comes to shopping.

In 2019, this trend is set to continue to grow on a global scale thanks to macroeconomic instability and it will become even more entrenched into everyday life. Increasingly, consumers are driven to examine and question everything they read, see and hear. This inherent mistrust of information, perpetuated by social media, encourages similar behaviours while shopping. With Brexit looming, tensions surrounding the potential China-US Trade War and volatile currencies in Latin America due to political turmoil, people are wiser than ever about what they spend their money on and assess all options before committing.

Consumers are as conscious of price as they are of their peers' recommendations

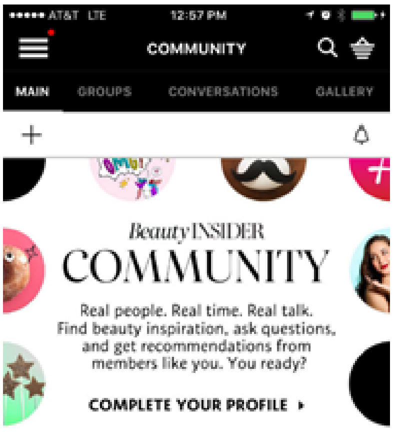
This consumer trend is more prevalent among those with a mid / high-range income. In Western countries, even wealthier consumers demand value for their money—and are just as vocal online about any bad experiences. Lower-income consumers will participate less in this digital trend on a global level. This demographic is less likely to have internet access, nor the time to research each purchase extensively as per the 'expert' trend. Expert consumers are also more likely to be aged 15–40 years and accustomed to using the internet extensively in their everyday lives.

Consumers Turn to Their Peers to Inform Purchase Decisions



Source: Euromonitor International's Lifestyles Survey (2017)

Response to Everyone's an Expert



Source: Sephora

Sephora, Beauty Insider Community US

This tool gives Sephora customers five responsive features which give the online consumer the option to communicate directly with beauty experts and fellow shoppers. It is free to sign up to the community, meaning that beauty obsessives, amateurs and experts can exchange information and advice, making them better informed about their purchases and encouraging a sense of support and friendship. Traditional customer service bots and poorly-designed contact pages can mar the shopping experience. Sephora has reimagined customer service by interweaving it with the demand for reviews and feedback, to provide a forum where everyone can be an expert if they want.

Masse US

When shopping online, consumers looking for the perfect product must trawl through hundreds of reviews, making even what should be a straightforward, simple purchase, a challenge. This is further problematised by the rise of inauthentic reviews and content, perpetuated by brands creating sponsored content with influencers. In November 2018, Instagram announced that it would crack down on the common phenomenon of accounts buying fake likes and followers. New app Masse tackles untrustworthy content and reviews online and fosters a sense of non-incentivised, communal discussion.

One of Masse's founders, Elizabeth Shaffer, says that [they] are "trying to create a community where users can share product recommendations with each other, totally free of paid content." The user creates an account, posts a request for a recommendation of virtually any kind of consumer product, and then receives advice from fellow account-holders. The founders, Shaffer and Lizzy Brockhoff, credit people's inclination to pay forward kindness as the key to their success. Once they receive an authentic, useful product recommendation, they want to pass their own useful knowledge onto others. Masse is a community of influencers, like Instagram in a way; however, there are no financial benefits for users to reap. They are just helping each other out.

Wirecutter US

Wirecutter is a product review website owned by the New York Times. It trials everything from cake pans to Chromecast speakers, from folding chairs to formula milk. Most of the site's revenue is generated by affiliate links, but staff review writers are not told which are commissioned, to prevent bias. The aim of the website is to act as a centralised point for online reviews; the internet is rife with fake reviews and testimonials. With the prestigious 'NYT' name behind it, Wirecutter acts as a trusted hub for consumers looking to get the best quality product, at the best price.

Source: FIIT

FIIT UK

Described as 'the Netflix of fitness apps', FIIT is an app that hones and elevates the healthy living trend by offering subscribers classes and routines by world-leading instructors. The app can connect to smart TVs and allows real-time physical interactive tracking with a chest strap that monitors exertion and performance, encouraging improvement and benchmarking. FIIT is different from traditional apps because it creates a bridge between at-home exercise routines and gyms, offering home workouts that have a built-in, trackable element that most apps do not offer. The rise of boutique gyms and classes in metropolitan areas in many major markets has contributed to consumer demand for personalised, expert gym sessions, but hugely expensive gyms with restrictive hours do not suit everyone. FIIT lets consumers take their exercise routines into their own hands, not only cutting out gym costs but providing equipment that keeps consumers accountable and driven to achieve their fitness goals.

EXPERT VIEW

The more empowered you are, the more entitled you are

The shift towards a higher standard of consumer experience, choice and knowledge is a permanent change driven by the millennial and generation Z demographics. Consumers today rely on the expertise of their peers to make sure they get the best in a sea of sameness. Shoppers meticulously check reviews before committing to a product and are increasingly more likely to leave their own feedback. Consumers are giving themselves extra work before, during and after the purchasing experience, because they feel empowered by their knowledge and want others to feel the same.

Companies now put their customers on a pedestal. We're sent discount codes, free gifts, special offers—what used to be considered VIP treatment—simply for buying something. The power has switched. Whereas retailers used to hold customers in the palm of their hands, now shoppers must be given a good reason to buy something in the first place.

Everyone's an Expert, but everyone's more entitled too. No free delivery? Forget it. No loyalty rewards programme? I'll take my business elsewhere. Unless brands cater to the consumer, they are not going to survive in this new shopping realm.

MICHELLE GRANT
Industry Manager, Retailing
Euromonitor International

Outlook for Everyone's an Expert

At the root of the Everyone's an Expert trend is the almost compulsive need for digital consumers to absorb and share information. As internet retailing continues to increase globally, all industries will have to adapt to consumers' new demands to stay relevant.

'Passion' industries such as travel, beauty, fashion and foodservice are particularly involved and receptive to this trend. Passion products are personal products, luxuries or experiences that have a particularly subjective element, rather than a non-passion commodity product such as toilet paper or dog food. Therefore, these specific industries must address the desires of their target audience and satisfy them with multi-platform marketing strategies that consistently remind the consumer of their importance and individuality. Now that Everyone's an Expert, the one-size-fits-all approach to marketing no longer fits.

FINDING MY JOMO

The joy of missing out

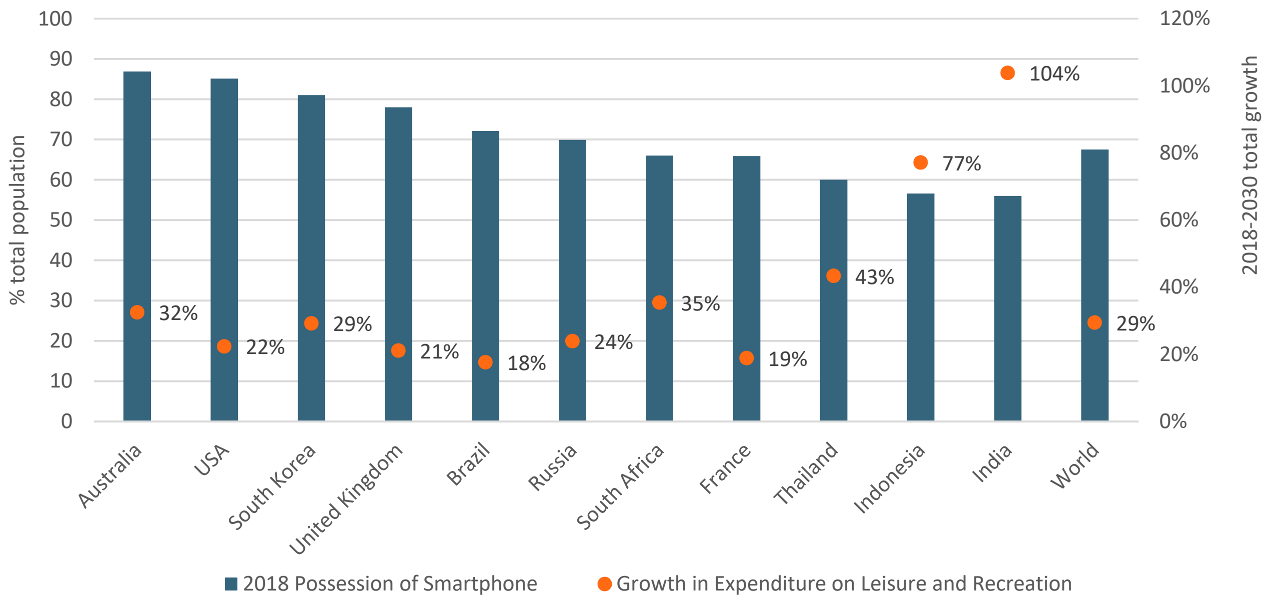
Boundaries between work and life are blurred and so are those separating the private sphere and the social. Social networks give the illusion that we all should be doing something exciting and saying (or posting) something for others to acknowledge. The fear of missing out, of being left out, has given place to the re-appropriation of self-time. To protect their mental wellbeing, consumers want to be more intentional with their time, to set their own boundaries and be more selective in their activities. Concerns over personal data protection mean consumers are also more intentional in the way they manage their privacy online. The need for finding their JOMO sees consumers reducing their time online or cutting down on their social engagements, in favour of real-life experiences which they no longer feel compelled to share on social networks.

Back to real life

Mobile connections and social networks have transformed enjoyment of social life into a form of obligation. The constant pressure to react instantly to message notifications, coupled with the increasingly ubiquitous nature of work has transformed our lives into a 24 / 7 commitment to meeting others' expectations.

Fears over online personal data management are also on the rise globally. The Facebook Cambridge Analytica scandal and, in China, the introduction of online activity monitoring to develop a social credit system rating add to the apprehension. A growing number of users have turned to more stringent privacy settings, deleted apps from their phones or left social networks altogether.

Possession of Smartphone 2018 vs Growth in Leisure and Recreation Spend 2018–2030



Source: Euromonitor International

As smartphone possession increases, consumer expenditure on recreational and cultural services is also set to grow strongly, especially in markets where digital stress levels are highest.

Unprecedented mobility and flexibility coupled with a sense of uncertainty, driven by a largely precarious work and housing market have led millennials to consider solid objects important to define who they are, to enhance their sense of ownership. Sales of books and even of old-school vinyl records are growing and businesses are tapping into this trend. Consumers appreciate the joy of browsing in-store to find the right purchase, especially for things they are passionate about.

To disconnect, consumers are choosing to temporarily move away more often from phones and to focus on real-life experiences. This is true also on the move. Audiobooks are proving to be a powerful distraction from the pain of a workout, a jog or a long commute back from work.

Offline courses are on the up and so is the appreciation of real-life interaction as value-added to learning new skills. Cafés where Wi-Fi is deliberately unavailable become a Finding my JOMO choice for re-establishing the space as a place of enjoyment and relaxation, away from client calls and lunch-time work.

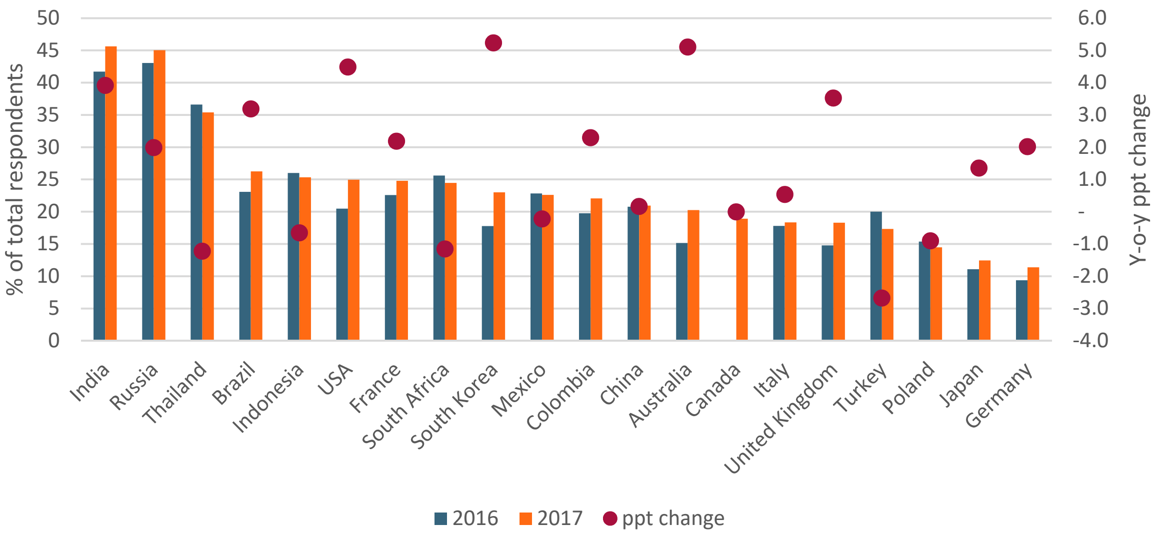
Why and how people are Finding their JOMO

Over-reliance on the internet is a becoming a source of stress globally, more so in emerging markets than in developed. Here the stress is likely due to the internet being largely used to perform essential tasks and to access indispensable services, in a context where broadband connection is not widely available and where a high share of consumers remains internet-illiterate.

For example, in economies such as India, Russia, Brazil and Indonesia the internet is increasingly used to bridge the gap between consumer needs and the unavailability of specific goods and services in more remote locations due to logistics weakness. Consumers are often left wanting to couple the advantages of virtual connection with forms of face-to-face assistance in case things are unclear or go wrong.

It is in developed markets where the perception of the internet as a source of stress is growing fastest. South Korea, Australia and the US are the markets where this perception has grown the most.

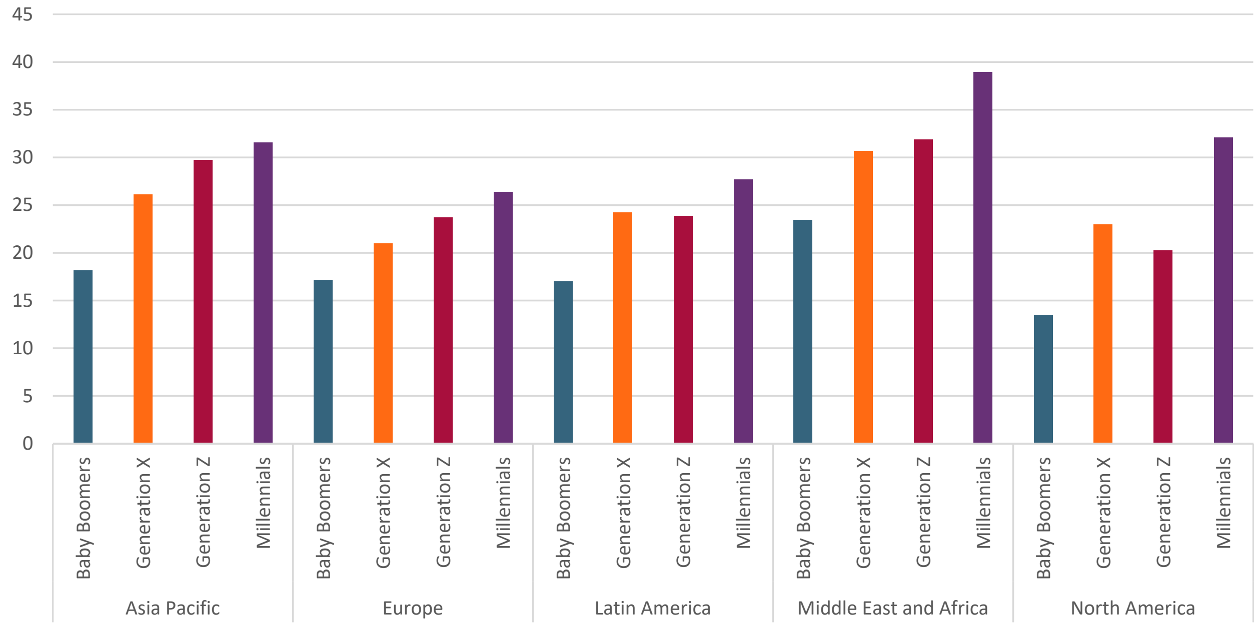
Consumers Agreeing that Internet use adds to Stress Levels



Source: Euromonitor International's Lifestyles Survey (2016, 2017)

Regardless of the origins of a desire to return to forms of offline interaction, setting boundaries on digital exposure to the public eye adds intention to what consumers choose to do. Globally, millennials feel the need for re-empowerment more strongly than other generations. Planned disconnection provides them with time to reflect and to act freely, focusing on what they really want and enjoy doing.

Internet adds to my Daily Stress Level

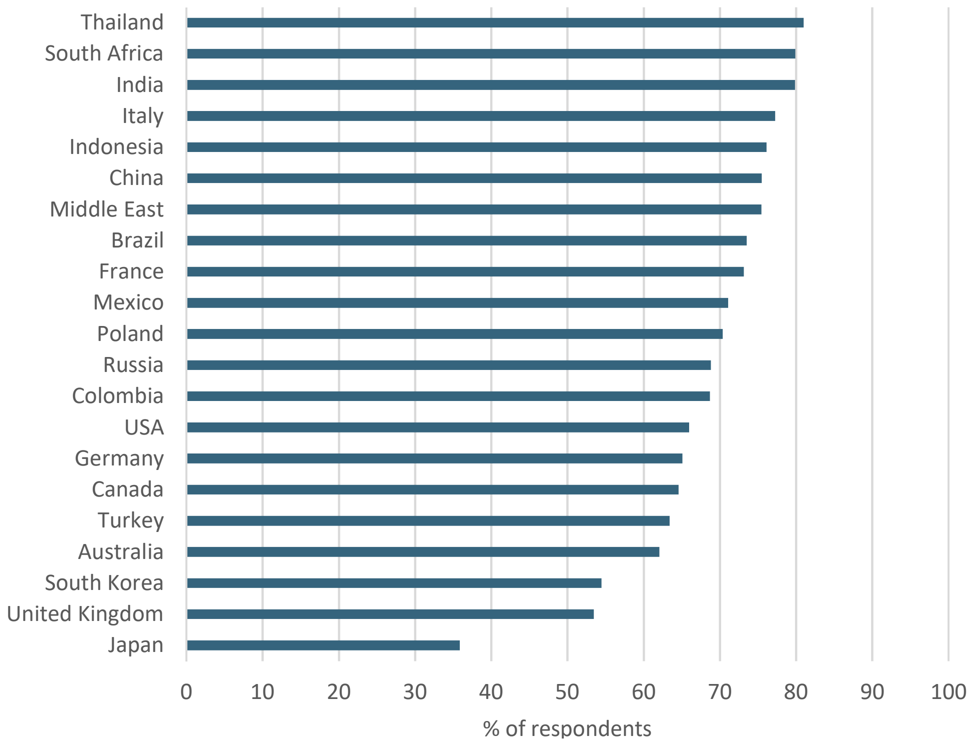


Source: Euromonitor International's Lifestyles Survey (2017)

Finding my JOMO consumers look to 'de-clutter' social network engagements to carve out more time for themselves and to simplify the way their spare time is spent. Need for simplification takes many forms. Firstly, consumers are detaching from their phones to focus on other offline activities in the home as well as on the move. And consumers are moving away from constant multi-tasking, back to 'one thing at the time' during their spare time.

This more reflective and individual approach to what is needed to relax and enjoy real life outside of work means consumers are changing their role on social networks. Consumers are no longer pure followers, and no longer feel compelled to be online all the time. Rather they are becoming proactive users of information and communication to achieve specific personal needs, feeling free to disconnect and reconnect whenever they feel the need to.

I Find I am Looking for Ways to Simplify my Life



Source: Euromonitor International's Lifestyles Survey (2017)

Response to Finding my JOMO

Source: COOKiamo

COOKiamo Italy

COOKiamo offers cooking courses with the aim to get people to enjoy time together, while preparing, cooking and eating the food. In the provincial town of Treviso, COOKiamo connects locals to international foods with renowned chefs while giving attendees the opportunity to interact in real life. Such events are set in locations that are reminiscent of a real home kitchen and a dining room to help participants feel relaxed.

Waze (Google) and Apple US

Road commuter app Waze has recently launched its Waze Audio Player to enable drivers to listen to their audiobooks safely while driving, getting lost in listening but not on the road, as the company puts it.

And Apple announced in June 2018 that Apple Watch will support audiobooks and podcasts via watch OS 5, allowing consumers to detach from their phone network while on the go or doing sport.

Waterstones UK

Large chains are adapting to the rise of consumer preference for independent stores and a return to printed books. Sales of traditional print books rose by 5% in the US in 2017, while sales of e-books fell by 17%. UK bookseller chain Waterstones returned to profit for the first time in 2017 since 2009 by focusing on one-to-one offline interaction with local consumers' tastes. They now want to spend more time in store, browsing for the right title, reading, exchanging opinions with store personnel.

Oberoi India

Source: Oberoi

Indian millennials are among the most stressed about online usage; an increasing number of consumers are looking for JOMO retreats. The Oberoi hotel chain in India is offering the opportunity to consumers to completely disconnect, offering so-called Digital Detox packages. Packages range in price, according to the location and customer budget. And in Bangalore, the Oberoi offers overnight stays to locals willing to completely disconnect from everything for 24 hours, without the stress of planning and long travelling.

EXPERT VIEW

Personalisation is core

Looking for ways to cut down on social media usage, app and e-mail notifications does not mean complete disconnection. Rather, consumers are looking to set boundaries, to carve out some mental space and time to focus on activities they enjoy. Millennials increasingly want to dedicate time to themselves and look for travel solutions enabling them to spend time at their own pace. While they are not looking for complete isolation from the rest of the world, they are looking to limit forced interaction.

Travel experiences help consumers with their social media diet, learning to limit online usage and to find their own way to enjoy present moments in real life activities. Consumers hope behavioural changes in holiday mode will help them change their daily routine once home. Evading does not necessarily involve long breaks in remote locations. What really matters to consumers is personalisation. They want to ensure their time offline is spent around their specific Finding my JOMO needs.

WOUTER GEERTS
Consultant, Travel
Euromonitor International

Outlook for Finding my JOMO

While online connection remains an important consumer need, consumers are now looking for ways to set boundaries on its use. They want to carve out their own personal space, which they dedicate to activities that are now intentional and reflective, rather than instant and reactionary. Finding my JOMO consumers are best catered for with personalised solutions matching their need to find mental wellbeing and to slow down at their own pace. Away from complete abstinence, consumers are looking for ways to test their mental strength by limiting online binge usage and to rediscover the joy of living in the present and in real life interactions. Temporary complete disconnection is a way that Finding my JOMO consumers have to test their willpower and limit daily online activity.

Apps that enable consumers to enjoy the moment with no distraction are expected to grow in popularity. Similarly, while smartphones are still expected to be an important tool for consumers willing to simplify their lives, there will be an increasing limitation on the time spent online and on social networks. As consumers learn to limit online activity and the use of smartphones, they are also taking more control over personal data management when they use social networks.

I CAN LOOK AFTER MYSELF

Consumers cut out the middleperson and turn to alternative self-care methods

The focus of this consumer-driven trend is on preventative, consumable measures against illness, unhappiness and discomfort, that people can take without having to consult a professional. The trend is characterised by forms of personalised restriction; the self-imposed ‘decluttering’ of one’s life, be it diet, house or wardrobe, that leads to versatility and, in theory, more choice. The I Can Look After Myself trend is a reaction to the impulsive, rigid and highly restrictive mode of consumerism that fast fashion, instant beauty fixes and fad diets perpetuate. Perceived stresses of everyday life are exaggerated, amplified and glamourised so that the similarly chaotic approach to shopping that consumers have is normalised.

Consumers make use of apps and personalisation services to create a product that is uniquely for them so that, ultimately, they can be more self-sufficient without the need to constantly engage with endless social media and brand marketing.

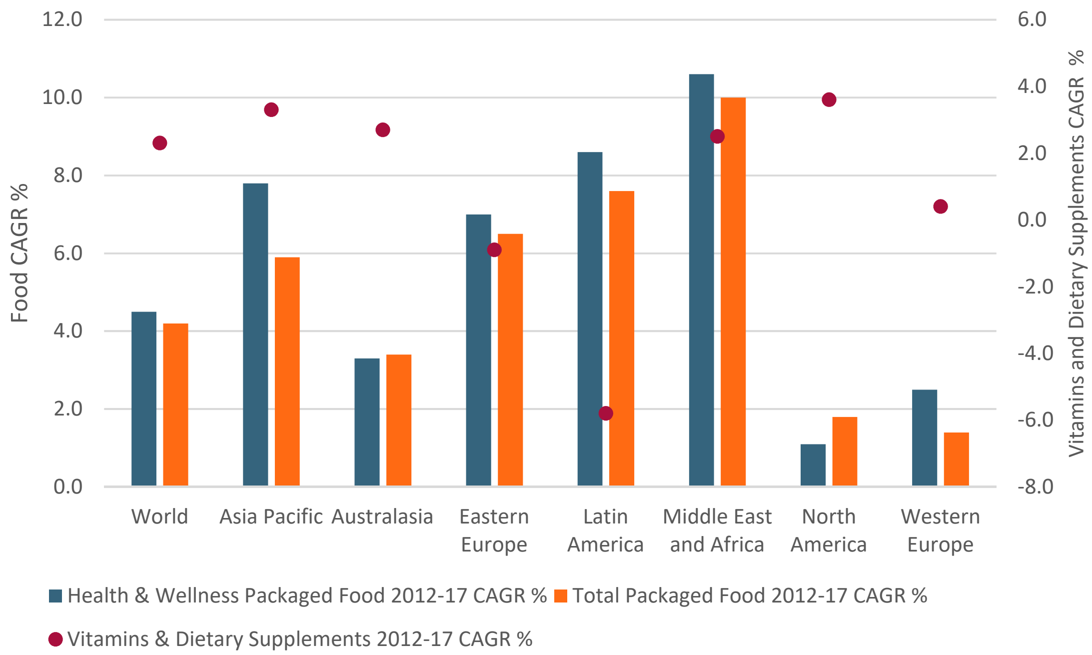
Hype products have gone hyperactive, leaving consumers craving self-sufficient simplicity

The grip and influence that social media has over consumer behaviours holds the key to what all brand managers and marketers aspire to create: hype. Consumers evangelise hype products in a self-fulfilling prophecy that leads to more and more choice but even less clarity on what actually works, what will solve the customer’s problem, what is worth spending money on?

Hype products exist in all consumer industries but are particularly prevalent in luxury goods, food and nutrition, beauty and fashion, more recently, ethical labels. With so much choice and so many claims being made that promise to change one's life, consumers increasingly want to take control of their wellbeing, cut out the noise and stop relying on brands as much. Debatably, products should aid and facilitate wellbeing, not hinder it.

A global focus on Conscious Consumerism, environmental concerns and a move away from chemicals towards more 'natural' products have encouraged people to be more mindful about what and how they consume. The rise of social media and its infiltration into all parts of modern consumers' everyday lives has also put into perspective the amount on which we rely on devices, brands and companies just to get by.

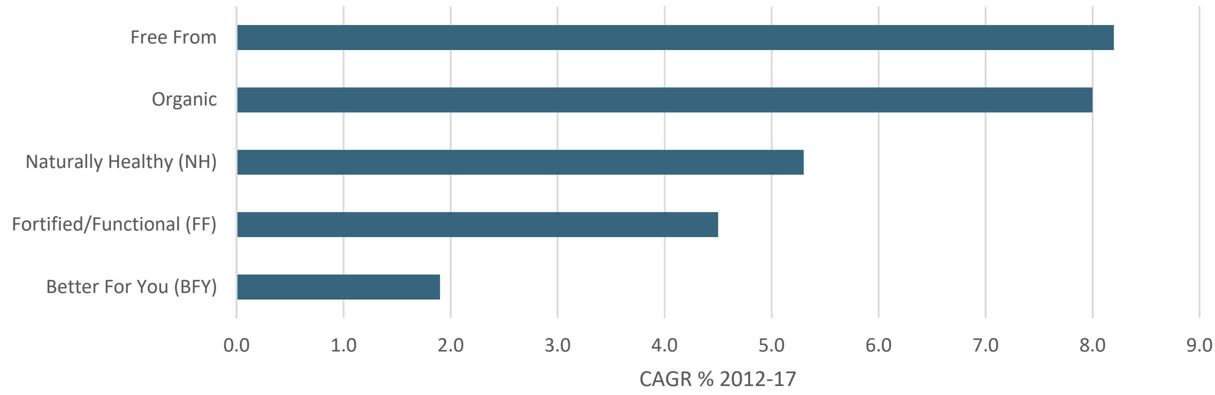
Health and Wellness Foods and Vitamins and Dietary Supplements Outpreform 2012–2017



Source: Euromonitor International

I Can Look After Myself consumers are active and engaged but turning to services that simplify, clarify and improve everyday life, rather than manage it for them. Foods with 'free from' labels are still the fastest growing category in packaged food, but apps such as Spoon Guru offer consumers a way to design their diet without having to rely on supermarket branding.

Global Health and Wellness Moves to Clean Labels and Organic, away from BFY

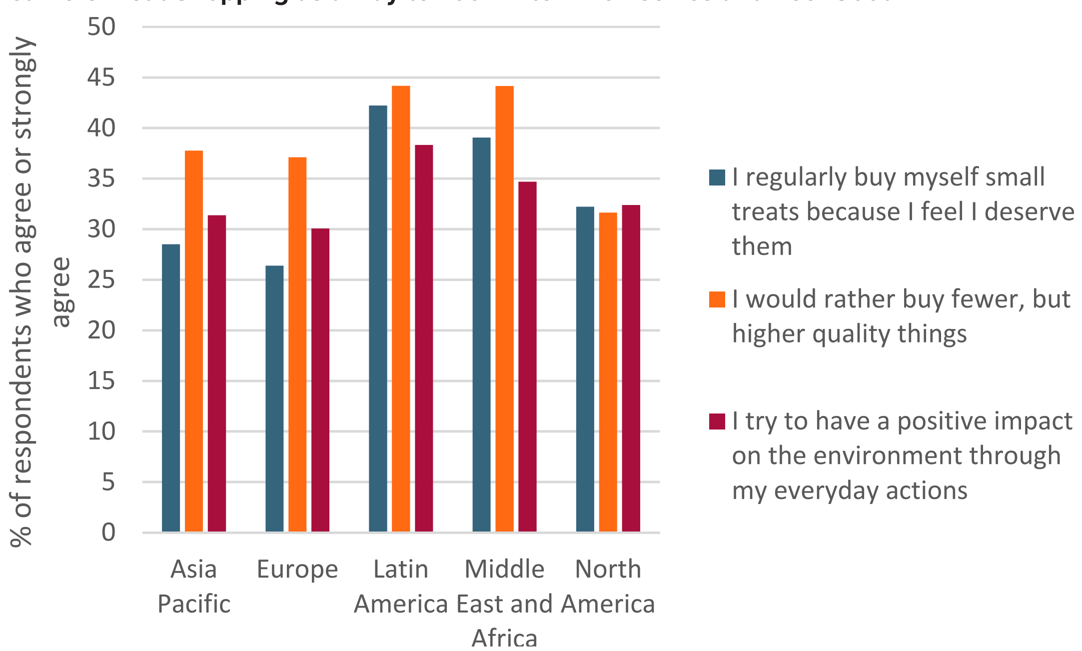


Source: Euromonitor International

Consumers prioritise health, happiness and simplicity and will spend more to get it

I Can Look After Myself is a form of self-care; however, rather than abiding by the same rhetoric that we must care for ourselves kindly, this consumer trend emphasises that we can care for ourselves successfully, if we have the right equipment to do so. As has been mentioned in the Finding my JOMO trend, people are looking for ways to simplify their lives, with the impulse strongest in Asia Pacific. However, the general global shift towards sustainability means that shopping is increasingly moralised. Consumers wanting to look after themselves now shop more sustainably, their ethical consumerism becoming a form of self-care.

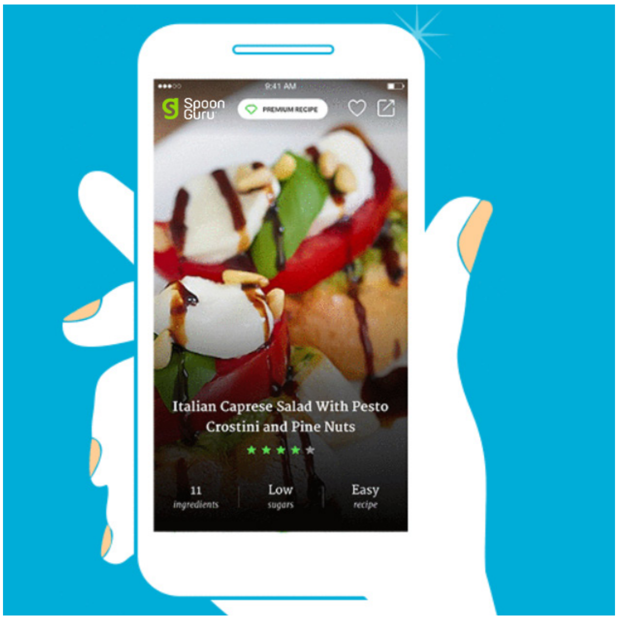
Consumers Treat Shopping as a way to Look After Themselves and Feel Good



Source: Euromonitor International's Lifestyles Survey (2017)

Response to I Can Look After Myself

Spoon Guru UK



Source: Spoon Guru

This app, founded in the US but now based in London, allows you to create your personalised profile in terms of dietary preferences via 180+ distinct tags. Based on your personalised profile the app recommends restaurants and recipes that are a perfect match for your dietary preference. In addition, you can scan product items in-store and it tells you if the product matches your profile or not. For users with genuine allergies, this app is particularly freeing and allows them to shop, cook and prepare food safely. Spoon Guru puts a positive spin on restricted diets—this is what you can eat, rather than emphasising what you can't.

Elvie: Wireless Breast Pump UK

This 'femtech' company has released what it claims to be 'the world's first silent wearable breast pump', which lets women pump discreetly, in public, on the go. Most breast pumps need to be plugged in to be used, placing limits on new mothers' mobility and freedom. Elvie's pump holds just over 150ml of liquid and each kit contains two. The pump can be used in conjunction with the Elvie smartphone app, which monitors the volume of milk pumped as it happens, the user's pumping history, and permits remote control of the pump. The device fits into any standard nursing bra and is electric and rechargeable for maximum versatility. Femtech is a booming industry, but currently is largely focused on contraception. Elvie's Wireless Breast Pump offers a tangible solution for breastfeeding mothers who must timetable their lives around feeding, by alleviating the physical restrictions that traditional breast pumps place on them.

Source: Elvie

TellSpec Canada

A hand-held scanner that offers real-time food testing, food safety and food authenticity. The scanner can be pointed to a foodstuff (unbranded such as a piece of bread) and the nutrient composition (per 100g by default) is automatically analysed, using Raman spectroscopy. The details of the food can be stored in the app and added to daily food diaries. The food tracking system compares the contribution of the given food in relation to daily recommended intakes. The feature of ingredient and nutrient recognition could potentially be extended to food safety applications. It is much more technologically advanced than other food diary apps and lets its users track all foods they eat, rather than just those that already exist in the app's database.

Source: TellSpec

Honour Your Breakup Australia

This Melbourne-based start-up is run by Leah Sheppard, a self-declared expert on how to overcome heartbreak. As well as touring and offering her wisdom, the site lets you buy or gift a Breakup Carepack (AUD65) filled with chocolate, candles and healing crystals. The website describes it as 'self-help on steroids and your one-stop empowerment revolution!'. Honour Your Breakup gives the customer a helping hand through heartbreak but emphasises the need for self-assessment and awareness during the period, emphasising that the customer can and should look after themselves—but they'll support you on the way.

Source: Honour Your Breakup

EXPERT VIEW

Consumers in control

The idea of being self-sufficient appeals to consumers. While many avid shoppers get a thrill out of shopping, trying new products and sampling new foods, the notion of being reliant on something makes us feel out of control. Being able to 'look after yourself' is seen as a luxury that allows people to be more versatile and expand their possibilities. This trend is reflected in the way people eat, drink and approach their dietary health in general. It has become much less acceptable to be uninformed about food.

Consumers are waking up to the rhetoric of social media and certain marketing techniques in the food and drink industries. The sheer breadth of information available leads to conflicting instructions and scaremongering. Solutions such as personalised nutrition, alternative health therapies and preventative solutions offer consumers much-needed clarity in a saturated, overwhelming space.

Consumers have had enough of too much choice and want to take back control. Rather than relying on brands for their wellbeing, consumers now demand transparency and to feel in full control of their own physical and mental states.

SARA PETERSSON
Senior Research Analyst
Euromonitor International

Outlook for I Can Look After Myself

The I Can Look After Myself consumer trend will become an important way of cancelling out the noise generated by endless, omnipresent social media, to focus more on personal needs. As consumers become increasingly aware of the pitfalls of social media, the next five years will see people look for more 'real' experiences, products and marketing. The idealistic, unachievable ideals on Instagram will be shunned in favour of brands that prioritise the individual needs of their target customers. Rather than being reliant on brands that only offer prescriptive, strict, curative solutions to life's problems, the consumer will tune out the hype and focus on products and services that they can personalise and cater to their own needs, rather than a famous blogger's.

I WANT A PLASTIC FREE WORLD

Consumers taking direct action to eliminate plastic waste

The push for a plastic-free society has gained momentum over the past 12 months, and in 2019, consumer desire for a plastic-free world will grow. Plastics, such as single-use packaging for food and beverages and micro-plastics found in beauty, personal and home care, as well as plastics produced by the fast fashion industry, are coming under increased scrutiny as the 'Blue Planet Effect' shines a light on the plastic-based waste products that end up polluting the natural world. From images of the 'Great Pacific Garbage Patch' to footage of marine life choking on waste, the BBC's eponymous Blue Planet has taken the issue mainstream and encouraged consumers to realise the full extent of the impact of our plastic-based society on the natural world. Awareness is encouraging people to take action, through campaigns and grass-roots conservation projects.

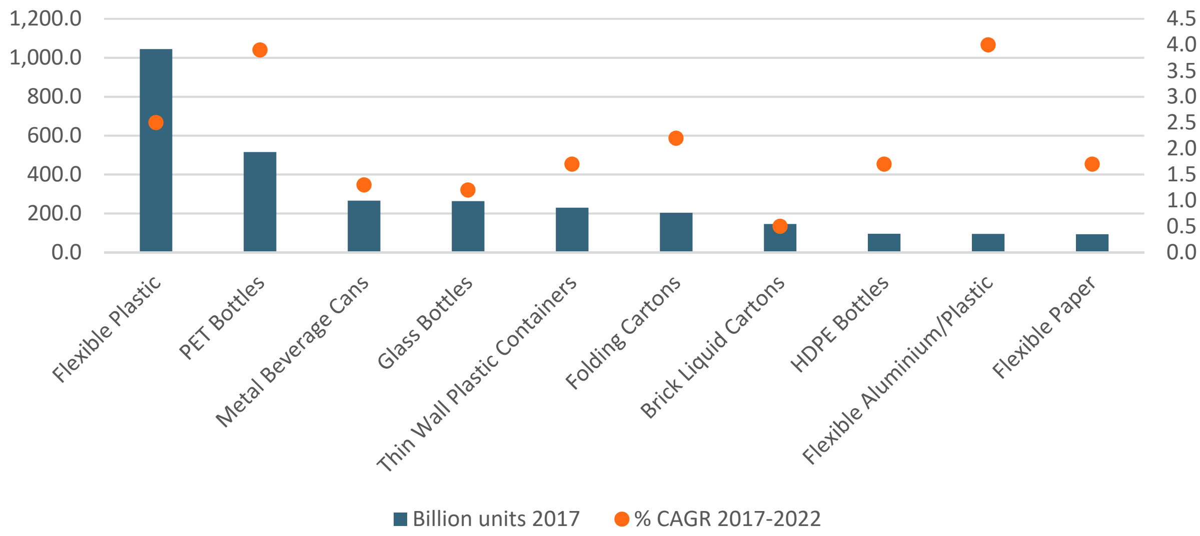
Ubiquitous plastic packaging, low recycling rates and a throw-away culture

Euromonitor International estimates that 63% of global packaging across the food, beverage, beauty, home care and pet food industries is currently made from plastic. Plastic has become the preferred material for a range of reasons including its versatility and durability and has significantly contributed to reduction in food waste globally.

But the rate at which this vast quantity of plastic packaging is recovered, recycled and re-used once its purpose has been served, is far from optimal and this is at the heart of the trend. There is a widespread lack of consumer understanding about what can and can't be recycled, partly due to little standardisation in pack labelling across countries and even individual localities. Further, recycling rates vary hugely by region and country as awareness, incentives and capacity to treat plastic waste differ widely.

Much of the Western world's plastic waste has been shipped to China for treatment and re-purposing, but the Chinese Government's decision to end this trade in 2018 will lead many Western nations to rethink their recycling policies. In Europe, Germany has high recyclability rates, with deposit return schemes for plastic bottles and efficient municipal recycling programmes contributing to a reduction in plastic waste. However, many countries do not have the infrastructure, resources or indeed the political will to put a similar system in place. To compound the waste issue, we live in a throw-away society where on-the-go food and beverage products are becoming increasingly common as people try to manage their busy lives and seek convenient solutions.

Global Leading Packaging Formats 2017 and CAGR 2017–2022

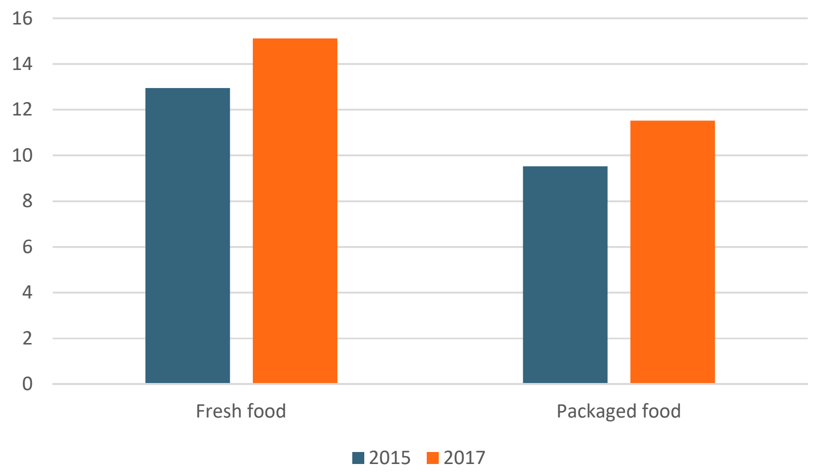


Source: Euromonitor International

Consumers are willing to pay more for eco-friendly and recyclable products

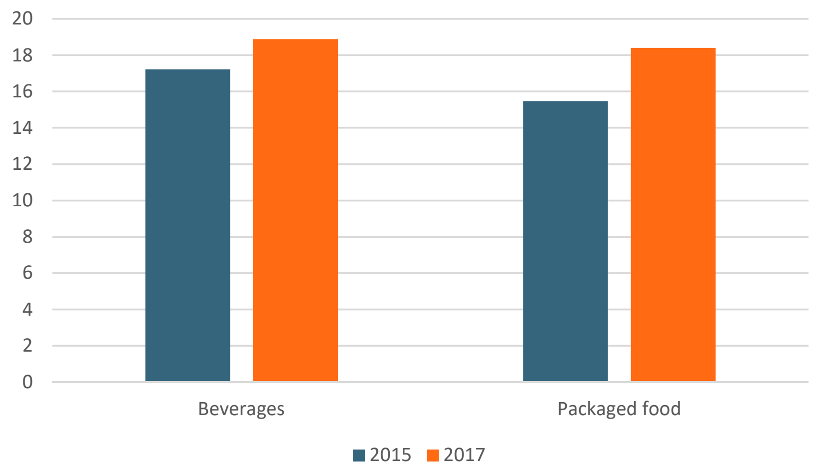
Nevertheless, now consumers are becoming increasingly sensitive to issues of plastic waste and this is impacting their shopping habits. The proportion of those willing to pay more for packaged food and fresh food which is environmentally conscious or eco-friendly has risen over the past two years. Similarly, the proportion of those who feel that recyclable packaging is an influential feature in beverage products has also grown.

% Willing to Pay More for 'Environmentally Conscious or Eco-Friendly' Products



Source: Euromonitor International's Lifestyles Survey (2015, 2017)

% Willing to Pay More for Products with 'Recyclable Packaging'



Source: Euromonitor International's Lifestyles Survey (2015, 2017)

Response to I Want a Plastic-Free World

Globally, action is being taken with the goal of achieving a plastic-free world. As well as individual and group initiatives from grassroots projects to NGO drives, brands also realise the pivotal role that they play and are galvanising.

Source: IKEA

IKEA Sweden

One example of industry helping reduce the negative impact of plastic is Swedish furniture giant IKEA. The global force is phasing out oil-based plastics, committing to making all products from recycled materials by August 2020, and phasing out single-use plastic products, such as plastic straws, plates and cups from its stores and restaurants by 2020. To help the company achieve these goals, IKEA has invested in a plastic recycling plant in the Netherlands. With 363 stores worldwide, a company such as IKEA has the potential to bring large-scale impact and set industry trends in sustainability practices for others to follow, both companies and individual consumers.


Source: Iceland

Iceland UK

Similarly, UK frozen produce supermarket chain Iceland recently announced plans to remove all plastic packaging from its private label product range by 2023. Plastic trays will be replaced by paper-based trays, while the company is working to replace the plastic seal currently used with an alternative plastic-free film. The aim is for all paper-based and other types of packaging for its private label ranges to be fully recyclable through domestic waste collection facilities or in-store facilities. The retailer hopes to remove 16,000 tonnes of plastic waste by 2023 via the initiative. Although other UK retailers have since followed suit and made similar commitments, Iceland was the first major retailer to have done so, again showing how companies can set trends in sustainability and challenge competitors to raise their game too.

Infosys India

Source: Infosys

Meanwhile, in India, Infosys, a major global IT consulting company, pledged to ensure its campuses would be free of non-recyclable plastics, as well as reducing the per capita generation of plastic waste by 50%, both by 2020. The company has cited PET water bottles, plastic bags, sachets, toiletries and bin liners as being the types of items to be replaced with more sustainable materials as part of the pledge. As the second largest Indian IT company, with a workforce of over 200,000 globally, and with a range of campuses including the world's largest corporate university across a 337-acre site in Mysore, Karnataka, Infosys has the potential to make a significant contribution to the fight against plastic pollution and instil positive habits in consumers in a country that contributes significantly to the global plastic waste issue.

YVY Brazil

In Latin America, companies are innovating and leading the way in minimising plastic packaging. YVY, a home care brand launched in 2018 in Brazil, is attempting to make the way consumers clean their homes more sustainable. The brand has designed a capsule system, like a coffee-pod, for cleaning products. Consumers sign up to a monthly subscription box, containing capsules delivered to their door. They are then inserted into reusable bottles with nozzles to spray and clean various items and surfaces. Once the capsule containing the cleaning product is empty, consumers can post the empty pods back to YVY free of charge to be recycled and reused. The system allows for a significant reduction in the amount of water used in the cleaning process and hence, the amount of plastic packaging. With a range of products for degreasing, dishwashing and multi-purpose cleaning, the company has already seen sales success and hopes to create a 'green cleaning' segment within the Brazilian home care industry.

Source: YVY

EXPERT VIEW

Aiming instead for a plastic waste-free world?

Plastic has never been such a talking point of consumer concern and set to be an even bigger consumer focus in 2019. The durability of plastic packaging, noted among its strengths, is being scrutinised because of plastic's polluting presence. Notable NGO and legislative initiatives targeting plastic have pushed plastic high up the public agenda. Some retailers are making plastic-free commitments and brands are pledging to go further on re-use, recycled and recyclable packaging.

It is important not overlook plastic's valuable contributions. It's used in medicine, construction and transportation. There are also inherent protective and resource-efficient benefits afforded by plastic in preventing food waste. Rather than a wholesale 'plastic-free' target, perhaps a 'plastic waste-free' world should be the goal. By adopting a circular economy approach and harness the current spotlight on plastic as a way to progress development. Brands designing out surplus and ensuring plastic recovery and re-use, is a start. Optimised waste management infrastructures and a greater consumer understanding of plastic handling post-use is also necessary.

ROSEMARIE DOWNEY
Industry Manager, Packaging
Euromonitor International

Outlook for I Want a Plastic-Free World

The desire for a plastic-free world is largely consumer-led and will gain further momentum in 2019 and beyond. As the conversation moves on, understanding of plastics' various uses in modern society will increase, and the emphasis will be placed on responsible use. Increased consumer understanding will also help to police so-called 'greenwashing', helping to expose false eco-friendly claims. While plastic alternatives, such as sea-weed water pods instead of plastic water bottles, will continue to be developed, the wave of corporate pledges on recycling / recyclability is also a positive step. Already we are seeing increasing momentum behind the circular economy, often at a grass-roots level, with plastic packaging waste being collected and repurposed continuously, and this is likely to continue in 2019.

I WANT IT NOW!

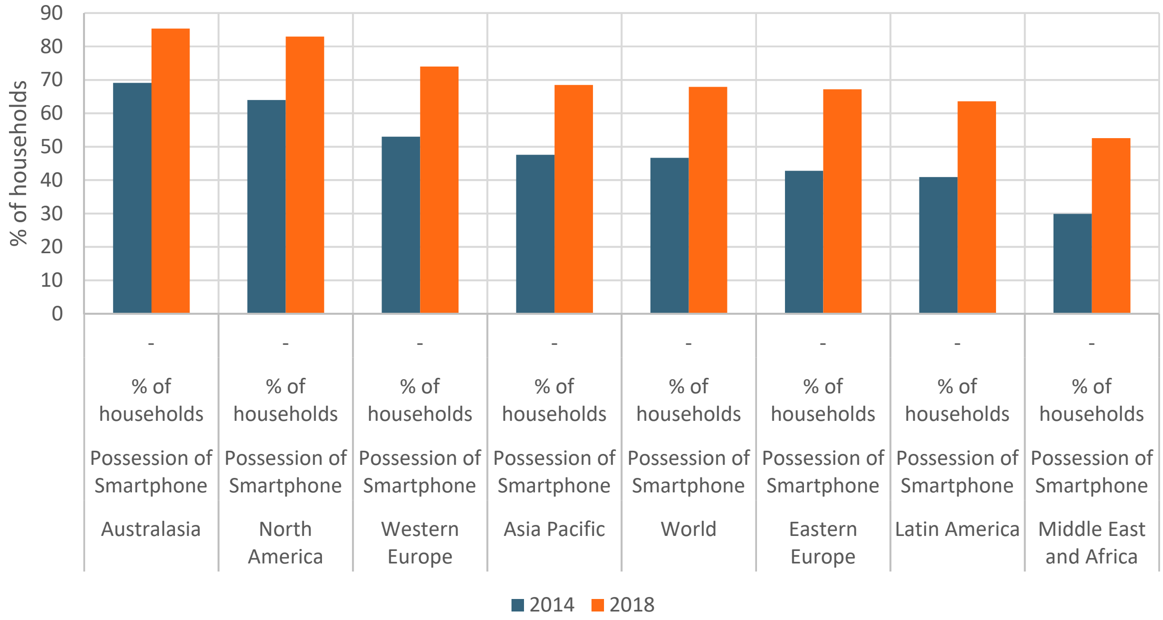
Efficiency-drive lifestyles and frictionless experiences

Consumers are as busy as ever. They are beginning to expect more from companies and want products and services delivered as quickly and simply as possible. Efficiency-driven lifestyles transcend instant gratification. I Want it Now! consumers seek frictionless experiences that mesh with their lifestyles, allowing them to dedicate more time to their professional or social lives. They increasingly turn to apps that help them organise their lives and are especially intrigued by innovations that help them avoid queues, reduce waiting time, and synchronise their personal information and preferences.

Mobile app technology helps consumers keep up

Technology, especially the adoption of apps, will continue to drive this trend, and younger consumers will more quickly adapt to digital innovations. For example, there exists a stark difference in the use of services through mobile apps, as younger generations are three times more likely to use a mobile banking app, and twice as likely to use a ride-sharing service, compared to older generations. Companies such as Alibaba and Samsung have become market leaders in markets with high smartphone penetration, but as the digital economy continues to advance in South and Southeast Asia, dominant players in the digital mobile arena are still expected to emerge.

Household Posession of Smartphones 2014 / 2018

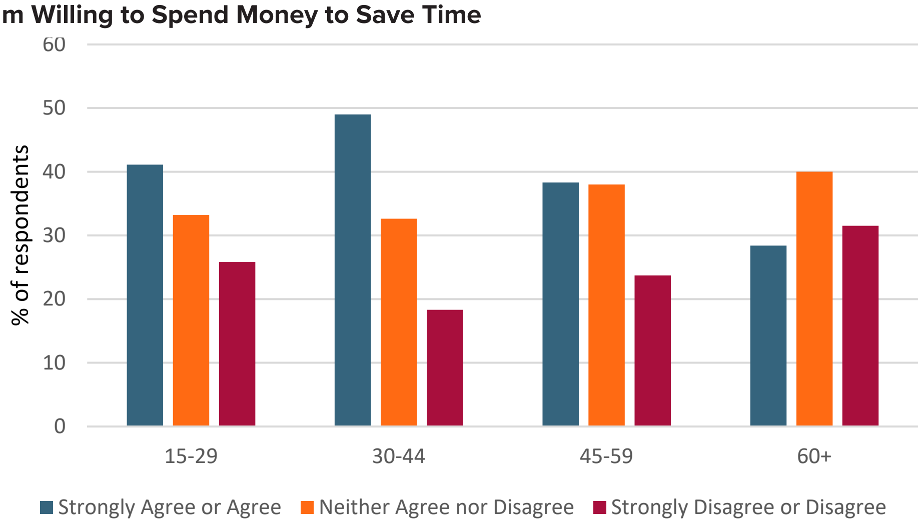


Source: Euromonitor International

The time premium is on the rise

The efficiency-driven lifestyle trend is driven by those aged 30–44 years, with almost half of this segment indicating that they are willing to spend money on products or services that save them time. This trend is particularly strong in societies with a high rate of development and urbanisation—in 2017, about 53.7% of Chinese respondents were willing to spend money to save time, while over 60% of Indian respondents shared the same sentiment.

I am Willing to Spend Money to Save Time

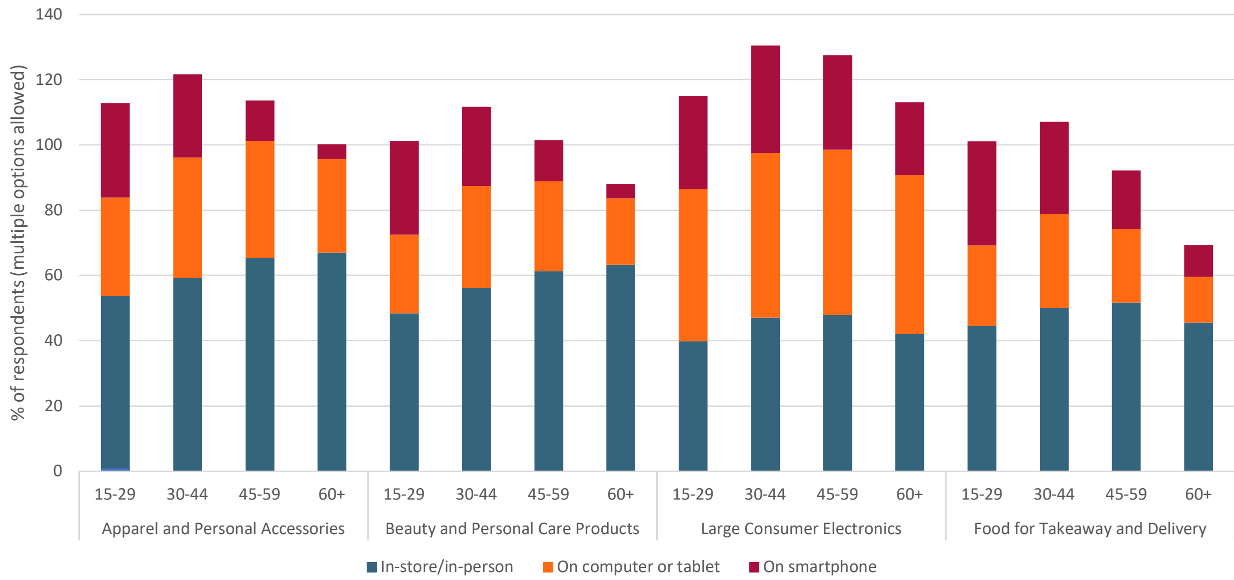


Source: Euromonitor International's Lifestyles Survey (2017)

Additionally, over 45% of women expressed concern that they are under constant pressure to accomplish tasks compared to about 40% of men surveyed, indicating that female consumers could stand to benefit most from time-saving products and services.

Those who purchased certain items online, including groceries, children's products and home care and cleaning products, increased from an average of 57% in 2013 to 66% in 2017.

Consumer Preferences for Path to Purchase



Source: Euromonitor International's Lifestyles Survey (2017)

Response to I Want it Now!

Source: Euromonitor International

Amazon / Amazon Go US

Amazon's launch of its Amazon Go stores in Seattle and Chicago is an attempt to upgrade convenience stores by ditching the queues. Shoppers must scan the company's app upon entrance to the store. Cameras and sensors track shoppers, allowing them to simply walk out as items are charged to their virtual shopping cart. The most popular items for purchase at these stores include pre-made meals designed for the lunch-time rush.

Washmen UAE

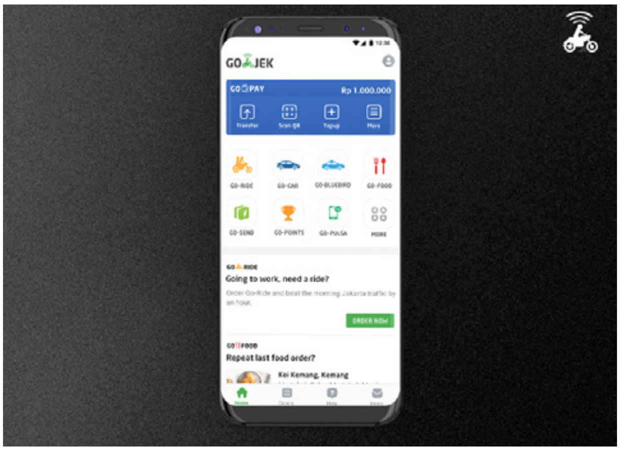
Source: Washmen Facebook

One of the Middle East's top 100 start-ups in 2018, Washmen provides dry cleaning and laundry services to clients via their app. Washmen is nearly ubiquitous in the United Arab Emirates and, according to CEO Rami Shaar, "more than 73% of the company's growth is generated by word of mouth." The company not only facilitates weekly laundry duties for its customers, picking up a load as quickly as 25 minutes, but it also builds trust by sorting the laundry, promising not to mix a client's items with others, and returning the laundry within one or two business days.

Medici South Africa

Medici recently established itself as an app allowing people to use text or video to consult with a doctor securely and instantly. The app was first established in the US, and its South African CEO expanded its operations to South Africa to tackle some of the costs and hassle of consulting with medical professionals there. Medici argues that its app provides the ultimate convenience for the consumer, since consultations are available for all medical professionals, including primary care physicians, psychologists, dentists, and even veterinarians. Its expansion to South Africa has major potential to impact lives, as many live-in remote areas and have limited access to a public health system.

Go-Jek Indonesia



Source: Go-Jek

For some consumers, an efficient lifestyle entails reducing the number of apps they juggle. Consumers in East Asia are turning to 'super apps,' such as WeChat, Line and Go-Jek, which enable users to access messenger, mobile payment, games, rideshare and food delivery, and many other services. Go-Jek began as a motorbike ride-share company in Indonesia, but its expansion into other services quickly resulted in 30 million downloads, and it is most popular among those aged 35–64 years. Its upcoming expansion into Singapore puts it head-to-head against native super app Grab. As super apps expand into markets dominated by incumbents, experts predict that they will begin to compete on engagement to build brand stickiness and data, which potentially leads to capturing market share.

EXPERT VIEW

Rise of super apps in East Asia

East Asia recently emerged as the mobile internet hub of the world, with over 1.1 billion mobile internet subscriptions registered in China alone. Emerging from the widespread adoption of mobile technology in Eastern markets are super apps. Super apps gained immense popularity in East Asia because platforms worked with companies to bring their branding to the apps, creating a convergence of social media apps and m-commerce at a critical time when consumers were rapidly adopting smartphones. The super app platforms facilitate the mobile experience for both companies and consumers.

Companies can control their home screens through the app and consumers can often access many essential services through the platform. It is a multi-functional mobile app that takes all aspects of a consumer's life and combines it into a single platform. The other major implication of super apps is that companies are no longer directly competing within their own industry for customers. Due to emerging tech players that better streamline services, consumers have come to expect more. They are no longer judging a company on their last great experience, but instead, comparing their experience to the whole consumer ecosystem.

MICHELLE EVANS
Industry Manager, Digital Consumer
Euromonitor International

Outlook for I Want it Now!

Larger technology companies with access to user data are poised to capitalise on this trend in the short term. These companies will be able to employ resources and research in 5G technology, artificial intelligence and the internet of things to help consumers save time and money. As consumers continue to rely on the efficiency of these products and services, they will begin to expect the same level of service from all companies, no matter the size.

Central to I Want it Now!, the efficiency-driven lifestyle, is the management of user data and a company's access to this data. The public's trust toward access and how it will be used, will ultimately determine the longevity of this trend. Smaller companies could find success by replicating the large players yet catering to niche preferences. For example, while Uber and Lyft dominate the wider ride-share market, Go Go Grandparent replicated the business model to provide seniors with similar services, while also offering the family the option to schedule grocery deliveries and check-ins from caretakers.

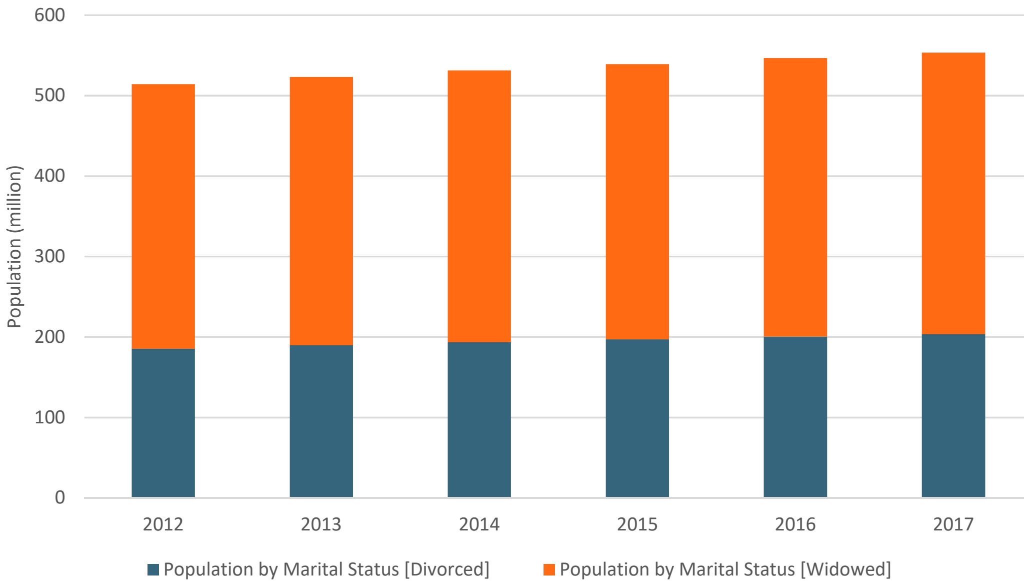
One generation is redefining the trend of living alone—older generations. This cohort of single later lifers (typically 50+) is typically wealthier and, while some have been single their whole lives, many are divorced or widowed and may have adult-age children. And this generation is not alone in experiencing the solo lifestyle. While baby boomers may have been well known for the high rate of divorce among their cohort, many of those in the younger generations have rejected marriage and even cohabitation altogether. Baby boomers are setting the stage for a trend that is bound to outdate their generation, which will alter how products and services cater to the Loner Living lifestyle.

Not tying the knot

Globally, the number of single-person households, which is expected to post a compound annual growth rate (CAGR) of 1.9% over the next decade, will outpace growth of all other household sizes, and baby boomers are expected to comprise a large share of this growth.

What are the drivers that are causing older generations to prefer a solo lifestyle? According to the Pew Research Center, the divorce rate for those 50+ nearly doubled from 1990 to 2015, from five divorces per 1,000 married persons to 10. Baby boomers already exhibited unprecedented levels of divorce in their younger years, and many of the recent divorces among this generation involve second or third marriages.

Global Population of Divorced or Widowed Individuals 2012–2017



Source: Euromonitor International

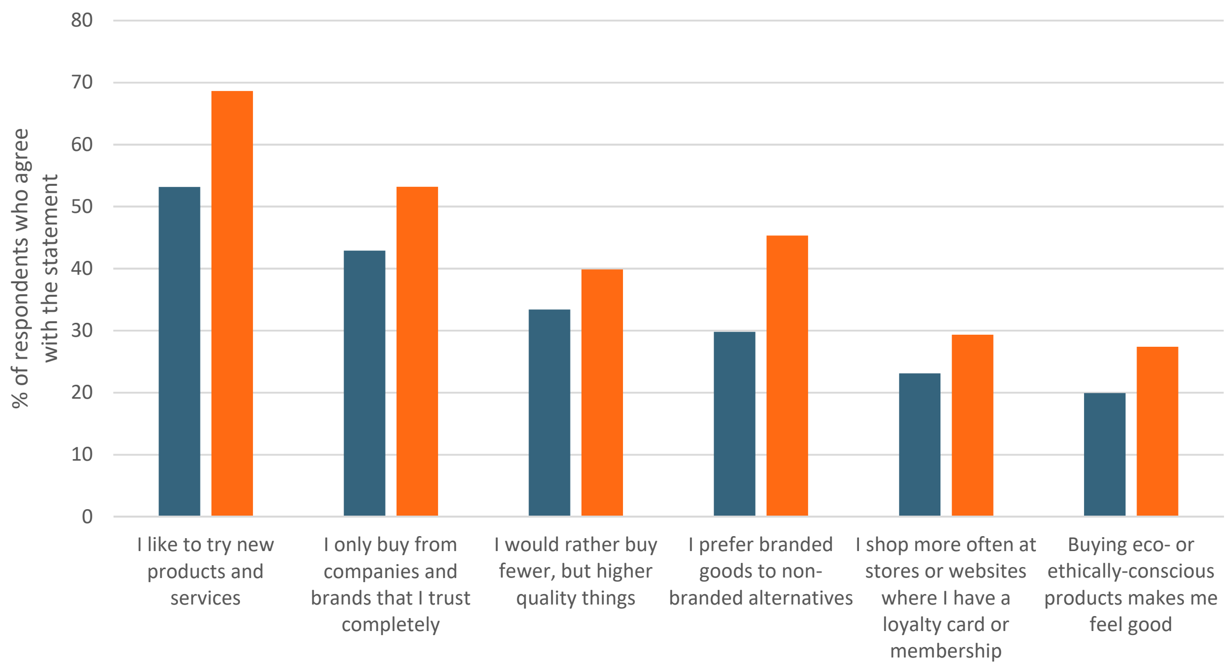
High divorce rates worldwide have always been a major indicator for single living, but an increasing number of individuals are deciding against marriage altogether. The latest US Census data (2012) found that about 20% of Americans aged 25 years or older were unmarried, and the Office for National Statistics found that over a third of those 16 and older in England and Wales were single. China's former one-child policy created a gender gap (30 million more men than women), and by 2030, more than a quarter of Chinese men in their 30s will never have married.

By 2030, it is estimated that the number of single-person households will increase by about 120 million, up about 30% on 2018. Younger people are delaying or eschewing marriage to focus on their careers instead or to indulge in personal development, education or travel. Many also prefer to live in denser, urban settings and therefore avoid the move to suburban homes, which are more amenable to raising children. Wider prevalence of single living, especially for those who are in or past their prime to start families, is etching away at the stigmatisation of living alone in later years and supports the hypothesis that choosing up about alone can lead to a healthier and more fulfilled life.

Loner Living consumers are sensible and proud

Euromonitor's Lifestyles Survey indicates that seniors living alone far outnumber younger generations, indicating that purchase habits and preferences of seniors tend to drive this trend. Therefore, it may be difficult to unpack what influences the purchasing habits of seniors living alone compared to those of younger adults, who may one day decide to cohabitate with another adult or start a family. Yet there is a major divergence in consumers' preference for well-known brands, as those who live with others are far more willing to pay more for established brands versus those living alone. The difference is more prominent among older consumers, as many have developed and celebrate their own independent image, and thus may reject fitting into a brand's marketing.

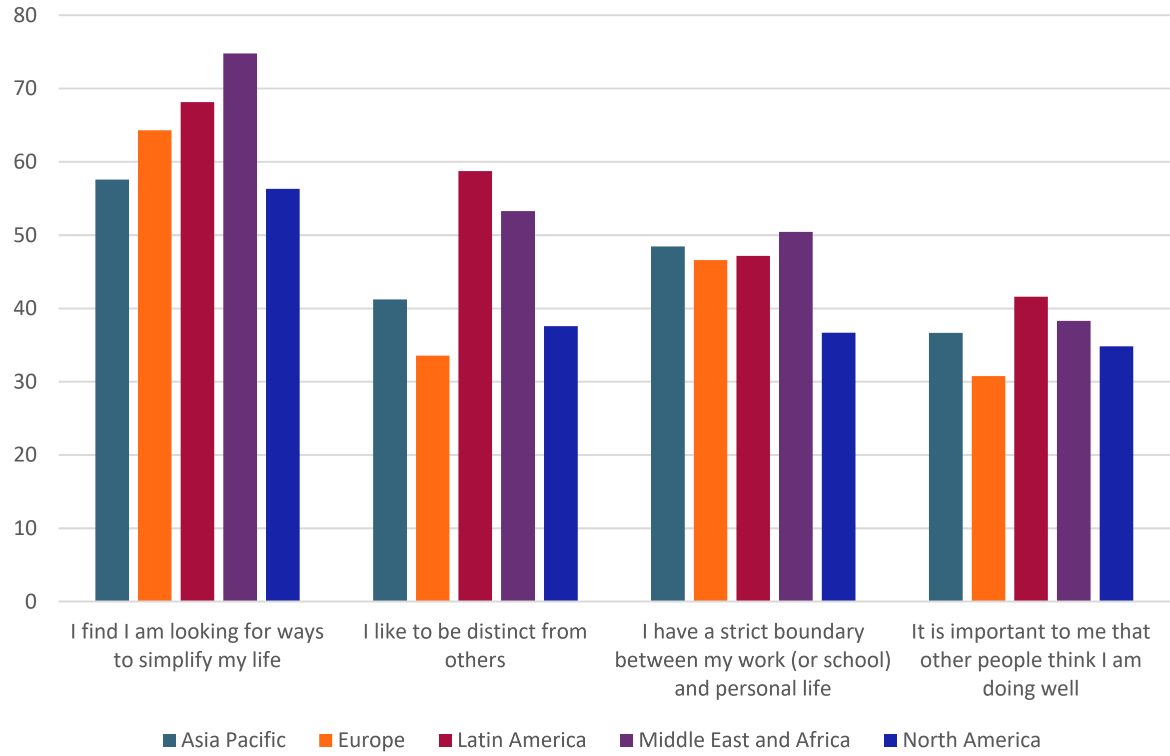
Shopping Preferences of Single vs Multiple-Member Households



Source: Euromonitor International's Lifestyles Survey (2017)

Additionally, Loner Living consumers are less willing to pay for products that are considered 'durable', 'high quality', 'on-trend' or 'natural'. Convenience and affordability are at the top of their minds. In fact, consumers living alone are more likely to prioritise financial security; bearing the full cost of housing and utilities not only alters their overall budget, but the consumption choices they make. Products that are simple, functional, and more likely to be disposed of versus being passed down or re-sold are pivotal to Loner Living. These consumers are also more likely to purchase products that come in smaller packages and are less sticky for a certain brand or loyalty programme. Products and services that help these consumers celebrate their proudly independent lifestyles will succeed in capturing this growing market segment.

Values and Motivations of Single Households by Region



Source: Euromonitor International's Lifestyles Survey (2017)

When looking at single households across different regions, differences in the motivations that lead certain individuals to choosing the single life emerge. Since households in the Middle East, Africa, and Latin America are arguably more family-centric, individuals who choose to live alone typically pursue a simpler, more distinct lifestyle. Those in North America, however, may be pushed to the single lifestyle because they chose their career over companionship, as they are less likely to create a strict boundary between work and personal life compared to similar households in other regions.

Response to Loner Living

Four-legged companionship on the rise in the East

Loner Living does not necessarily mean loneliness. Baby boomers in the West are renowned for lavishing their discretionary income on pets, increasing demand for grooming, pet sitting and luxury and natural pet products.

But while pet ownership is established there, more households are now adopting pets in the East. Pet ownership in Hong Kong has grown 72% over the past decade; the Veterinary Surgeons Board of Hong Kong estimates that about 545,000 households will own a pet by 2019. Hong Kong's demographic trends, particularly low birth rates, later marriages and a rising elderly population, are behind pet adoption. The retailer Pet Line opened six new retail locations over the past year, and elderly pet care centres that focus on improving life expectancy through critter companionship for the elderly are popping up across the city. Pets in developed cities in the East are being treated just like family.

OpenTable US

One of the major taboos Loner Living consumers face is the prospect of dining alone. Many busy professionals regularly dine solo, as more than 30% of Americans dine alone due to hectic lifestyles, and long work hours in countries such as South Korea have made solo dining a norm. OpenTable, an online platform that allows customers to make reservations at restaurants, is extending the idea of solo dining through its pilot programme in Virginia, US. When adventurous diners request an 'OpenSeat' on the platform, they are paired with other solo or groups of diners, as well as being offered a free appetiser.

The Freebird Club US

The Freebird Club is often touted as the Airbnb for 50+ travellers. It won an award back in 2015 at the European Social Innovation Competition and the concept has picked up in 2018 when the American Association of Retired Persons promoted the company to its members. All participants of the platform must be older than 50 and hosts are expected to interact and socialise with their guests. CEO and founder Peter Mangan proclaims that the concept succeeds in addressing significant social issues often faced by older homeowners and travellers: isolation, financial insecurity and a lack of travel options for seniors.

Source: The Freebird Club

Senior Shelf India

Almost a quarter of India's senior population lives alone, and we expect the number of those aged 60 and older to increase to about 340 million by 2050. As an increasing amount of young, working adults in India move away from their family and more of the elderly are adapting to living alone. One recent start-up, Senior Shelf, markets products and services that are particularly relevant to this customer segment. Recently it has expanded the services it offers, including senior citizen savings accounts and daily care services, to help later lifers in India better manage their solo lifestyle.

Source: Senior Shelf

EXPERT VIEW

The upside of being alone at home

For the many forty-, fifty-somethings and older generations that are enjoying their singleton lifestyle, the conditions to do so are improving. Aside from hyper-urban areas in capital cities like London, Tokyo and New York, households are becoming larger, both in terms of the number of rooms and size of territory. For example, households with three (19.8%), four (19.5%) and five-plus (17.4%) rooms will see the fastest growth rate globally over 2018–2030. This evolution translates into more space and thus more lifestyle options. Singletons may transform this extra space into gyms, entertainment lounges or just dining rooms to entertain friends and family. This further plays into trends like Cocooning, where homeowners are willing to transform their home into an entertainment space rather than relying on going outside for their leisure time. With the additional digital options available to singletons (wearables, smart homes, innovative communications platforms), being alone at home is no longer a negative.

PAVEL MARCEAUX
Households Specialist

Outlook for Loner Living

Single dwelling is not a trend specific to one generation or culture. People across the world are bucking the stigma of living alone and embracing their independent lifestyles. The Pew Research Center estimates that by the time today's US young adults turn 50, 25% of them will have been single their whole life. A 2017 Census Bureau report also found that about 55% of surveyed Americans did not believe that marriage or having children was an important criterion for becoming an adult. Baby boomers are the first generation to show that those who reject marriage or family units do not have to be outliers. They are setting the trends for how companies can win the business of Loner Living consumers.

Companies may continue to ignore single households because they believe that they are diverse individuals within larger groups, but the emergence of solo Loner Living consumers is changing that calculus. These consumers are more budget-conscious, perhaps given the disproportionate share of earnings they must allocate to housing. They often seek experiences that replicate companionship, whether that includes adopting a pet or travelling in groups. Increasingly, people are giving up the idea of finding lifelong companionship. Brands have a long way to go to partner with them as they develop their independent lifestyles.

Conclusion

The world feels out of control as we move into 2019. There is much political upheaval in developed markets and fast, totally unprecedented change in developing economies. 'Taking back control' has been the catchphrase for major political movements as people want more agency and self-determination.

Many of our 2019 Global Consumer Trends are about taking back control and asserting ourselves. In the face of turmoil and uncertainty, we feel more powerful when we can go back to basics and eat an egg laid by our own hen, or actively choose to find solace away from digital demands without junking them completely. We want to get that thing or service seamlessly and easily. We want to make a difference to the world by buying more thoughtfully. We want to look after ourselves and sidestep the experts, by taking up the reins of knowledge ourselves and driving the consumer conversation more than ever.

We need to feel just a bit more powerful amidst the chaos.

Methodology

Our annual Top 10 Global Consumer Trends are identified through a team Euromonitor International effort, making the most of our very broad and international coverage from industry market analysis to quantitative global consumer surveys.

We prompt our analysts internally in each of our industry verticals and poll the expert teams for their insights. We build a database of emerging trends and mine our trade interviews.

Each autumn, we take those collective insights into dynamic workshops and drill down collectively to pinpoint emerging short-term trends.

Finally, we poll our research teams in our 14 global offices and ask them to rank this long list and together we make the final cut.

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Alison Angus is Head of Lifestyles at Euromonitor International, a global strategic market intelligence company. Alison heads up the lifestyles and megatrends research focused on understanding consumer behaviour, attitudes and shifting trends, interpreting these into informative and useful insights to support business and its strategy planning.

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How Can Euromonitor International Help?

Euromonitor International is a global market research company providing strategic intelligence on industries, companies, economies and consumers around the world. Comprehensive international coverage and insights across consumer goods, business-to-business and service industries make our research an essential resource for businesses of all sizes.