

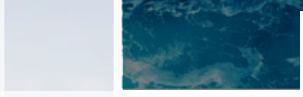
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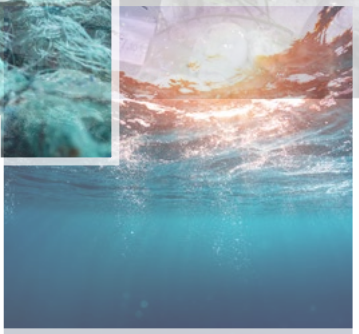
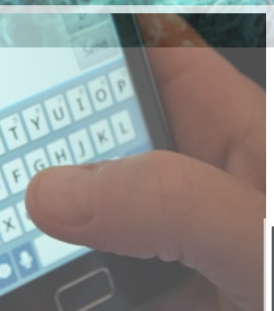
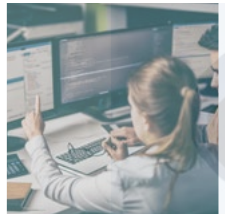
EUROPE



CONSUMER



TRENDS 2018



EDITOR'S NOTE

Hello and welcome to the consumer trends that we believe will define the European region in the coming year and beyond.

Our trend predictions are the product of a methodology that encompasses four components: we take account of the pending political and legislative events and product launches due in 2018; the appetite amongst consumers for these evidenced by Mintel consumer research; the momentum in innovations we are seeing from our team of global trend spotters; and the opinions of Mintel's expert industry analysts.

This year's predictions are in many ways reactions to the emerging challenges—environmental, political, technological and psychological—we're seeing across our region, but we are confident that you can turn them to the good of your business and to the benefit of your fellow consumers.

Best wishes for the year ahead.



Richard Cope
Senior Trends
Consultant



Catherine Cottney
Manager of Trends,
EMEA

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Sea Change

Ocean plastic fashion and recycled packaging launches, ingredient bans and activism are focusing consumer and government attention on maritime conservation.

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Shareholders

Hacks and data disclosure legislation form a new breed of consumers who will hold on tight to their data and demand something in return before sharing it.

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Teenaiders

Teens are increasingly defined by anxieties around image, health and work, and are looking for brands to alleviate the pressure and help them build both their confidence and prospects.

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Accountants

In a world of post-truth politics and unsubstantiated media, consumers are looking for brands to court them with transparency, simplicity and evidence.

What's Happening In 2018?

We expect that more and more brands will offer education and leadership with clean, safe and sustainable products that distinguish them from the competition as more food and beauty brands seek to highlight and safeguard the purity and future supply of their ocean ingredients.

Lobbying campaigns by Greenpeace will make consumers more aware of ocean plastic and its impact on wildlife and their own health. The UK government's ban on all 'rinse off' personal care

and cosmetic products containing microbeads, and Scotland's commitment to a deposit return scheme on plastic bottles, are initiatives that many European countries wish to emulate, with Sweden set to do so for microbeads by 2020. Politics will also focus European consumer attention on marine conservation, with Brexit negotiations putting fish stocks on the agenda as the UK withdraws from the London Fisheries Convention and Common Fisheries Policy in 2018.

With Adidas making one million shoes from recycled ocean plastic and Procter & Gamble committed to introduce 25% recycled plastic across 500 million bottles sold yearly on its haircare brands, perceived polluters will be forced to follow. Coca-Cola has already responded to pressure by raising its 2020 recycling target to 50%.

More food and beauty brands seek to highlight and safeguard the purity and future supply of their ocean ingredients.

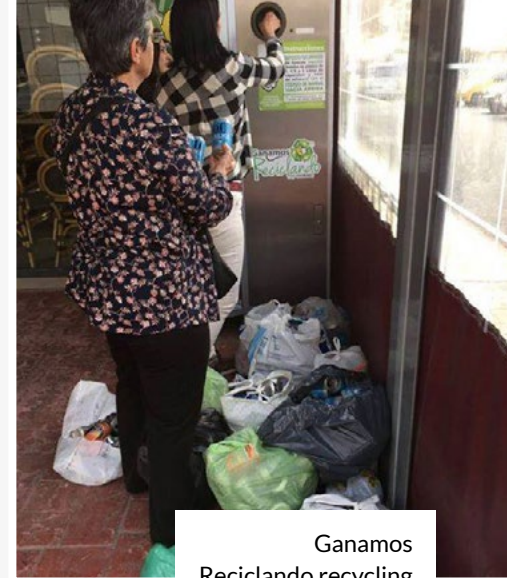
Government and lobbying campaigners will make consumers more aware of ocean plastic and its impact on wildlife and their own health.



Trends in Action



Negozio Leggero has 13 stores stocking more than 1,500 package-free products across Italy and Switzerland.

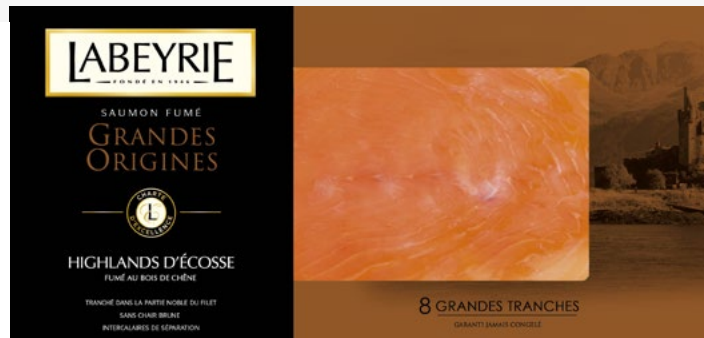


Ganamos Reciclando recycling machines reward consumers with points when they recycle materials like paper or plastic bottles.

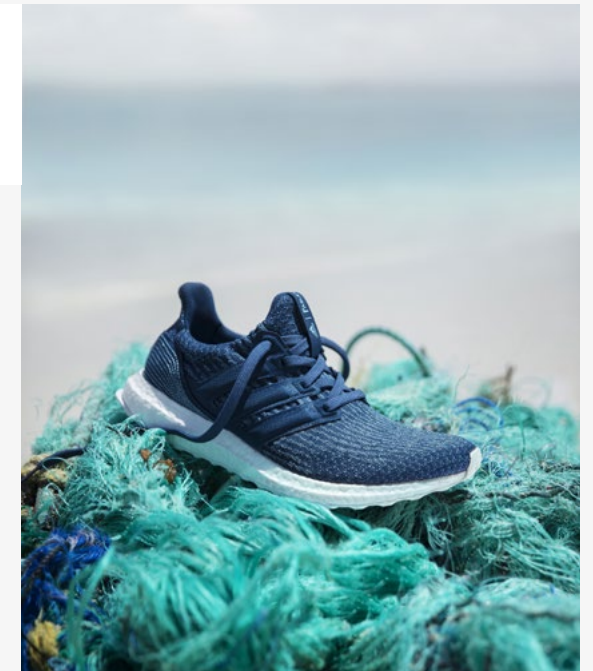


Procter & Gamble plans to introduce 25% recycled plastic across 500 million bottles sold yearly on its haircare brands.

Grandes Origines Saumon Fumé d'Ecosse (Smoked Scottish Salmon) is marketed as being selected from sites known for their quality of water, heralding a new era of sourcing from unpolluted areas.



In Spring 2017, Adidas debuted their new editions of its popular UltraBoost shoe, all made from plastic debris found in the ocean.



Why Consumers Will Buy Into This

The 267 species of seabird and 61% of turtles with plastic in their digestive tracts aren't alone, with a third of the fish and shellfish humans consume containing plastic too, according to Plymouth University. The problem is escalating, with the volume of ocean plastic predicted to double in the next

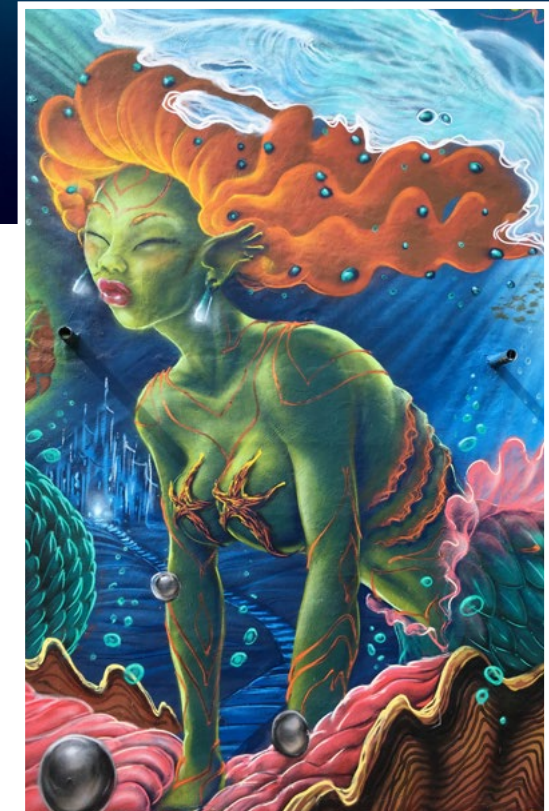
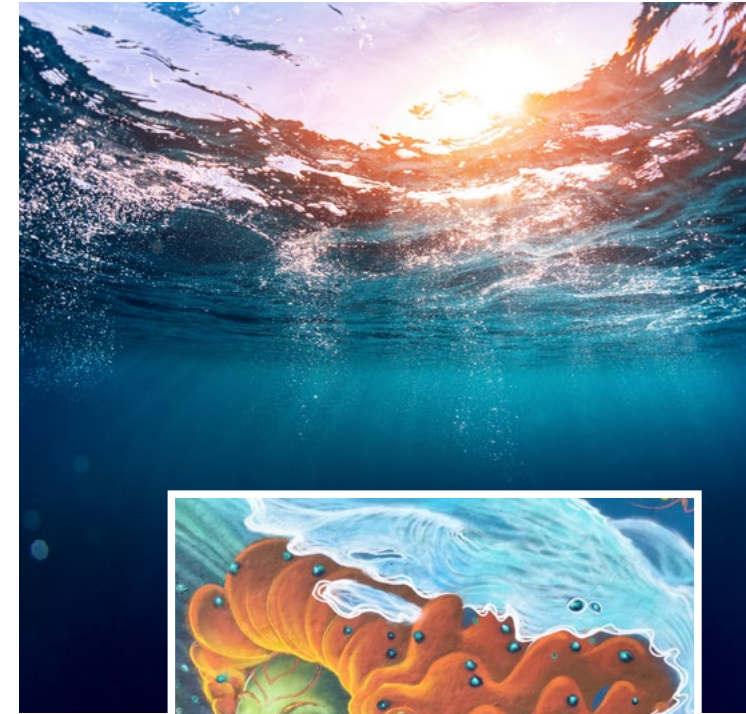
decade, according to the Plastic Pollution Coalition. Lobbying isn't about to stop either, with Greenpeace highlighting that just 14% of the 600 billion bottles produced globally in 2018 will be recycled. This is despite the fact that, according to Mintel, 66% of Polish consumers prefer

to drink water from a recyclable bottle. Meanwhile, two-fifths of Brits agree that pollution levels in the source area of water are a concern.

Sustainability and the environment are high on consumers' agenda, as Mintel research finds more than half of UK fish consumers would

like suggestions about sustainable alternatives, while two in five UK women aged 16-24 would like to see more eco-friendly fabrics used in clothes. Across Europe, Mintel finds a quarter of Spanish and German consumers agree that being "better for the environment" is the number-one reason for buying natural and organic products; this is followed by around a fifth of Italian and French consumers.

66% of Polish consumers prefer to drink water from a recyclable bottle.





Brands are responding to sustainability demands, as in Italy and Switzerland, Negozio Leggero has 13 stores stocking more than 1,500 package-free products and, in France, Grandes Origines Saumon Fumé d'Ecosse (Smoked Scottish Salmon) is marketed as being selected from sites known for their quality of water, heralding a new era of sourcing

from unpolluted areas. While in Spain, Ganamos Reciclando combines recycling machines with incentives by rewarding consumers with points when they recycle materials like paper or plastic bottles. The machine gives out money-off vouchers, discounts in certain stores and, in some cases, small amounts of actual cash.

UK consumer attitudes towards recycling products

49% would be interested in buying fashion items made wholly/partially from recycled plastic



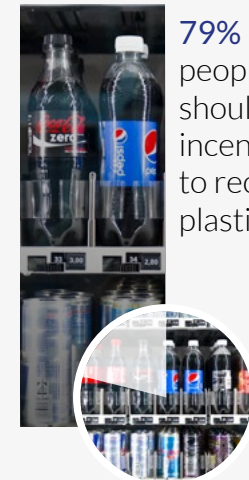
72% would be interested in buying products with packaging made wholly/partially from recycled plastic



73% would like to see more food/drink that is guaranteed to be sourced from (unpolluted) waters



79% believe people should be incentivised to recycle plastic



Where Next?

Whilst plastics won't be wholly demonised (they prolong shelf-life and prevent food waste) intensified eco-lobbying will produce more recyclable products. Expect to see incentives and initiatives like sponsored 'reverse' vending machines (such as those which accept used beverage containers and return money to the user) as well as more government-backed variations on plastic-bag taxes. We may well see social stigmatisation of plastic cups and cling film, more pioneering brands innovating

with soluble pod packaging, and more retailers dispensing with it completely. In food, drink and beauty, we'll see pure, unpolluted sourcing mainstream as a claim and natural exfoliators like salt and sand championed alongside other sustainable marine ingredients.

Fashionable, premium ocean plastic products will promote this trend in the coming year, but its consumer adoption will be driven by health and saving money, whilst for brands it will become a norm that governments

and lobbyists will compel them to embrace.

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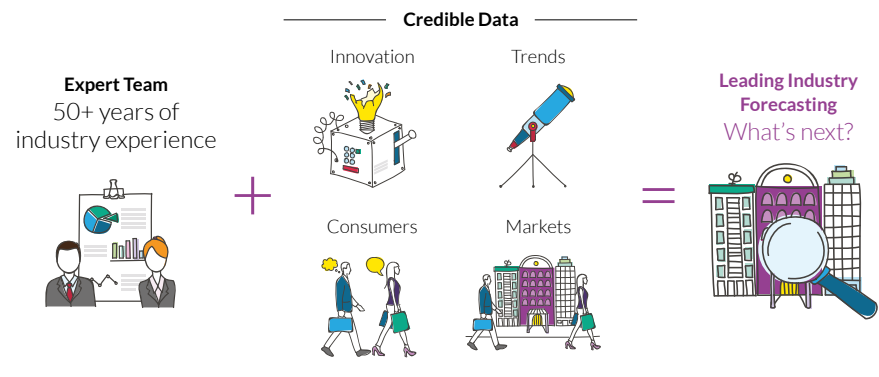


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SHAREHOLDERS

Hacks and data disclosure legislation form a new breed of consumers who will hold on tight to their data and demand something in return before sharing it.



What's Happening In 2018?



The data consumers are generating is escalating, but this data is creating vulnerabilities, as high-profile hacks of Yahoo accounts and the WannaCry malware crisis have shown. In response, consumers will protect themselves with software and behaviours learned from the more streetwise, private approach of younger generations.

At the same time, governments are providing protection, with the UK seeking to emulate the EU's

General Data Protection Regulation (GDPR) legislation, which from May 2018, will compel all businesses to seek consumer consent, disclose tracking and offer the right to be forgotten, when it comes to data disclosure. This effectively reboots the digital settings of the brand-consumer relationship and from now on brands will need to proffer economically or personally compelling incentives for consumers to resume sharing their information with them.

Consumers will protect themselves with software and behaviours learned from the more streetwise, private approach of younger generations.

Why Consumers Will Buy Into This

Mintel research reveals strong consumer concerns around both the tracking of their data and companies' ability to safeguard it. A meagre 8% of UK consumers strongly agree that banks can be trusted to keep personal data safe

from hackers/fraudsters. Meanwhile, two-thirds of Brits worry about how brands track their online activities.

However, consumers are also open to data exchanges in return for

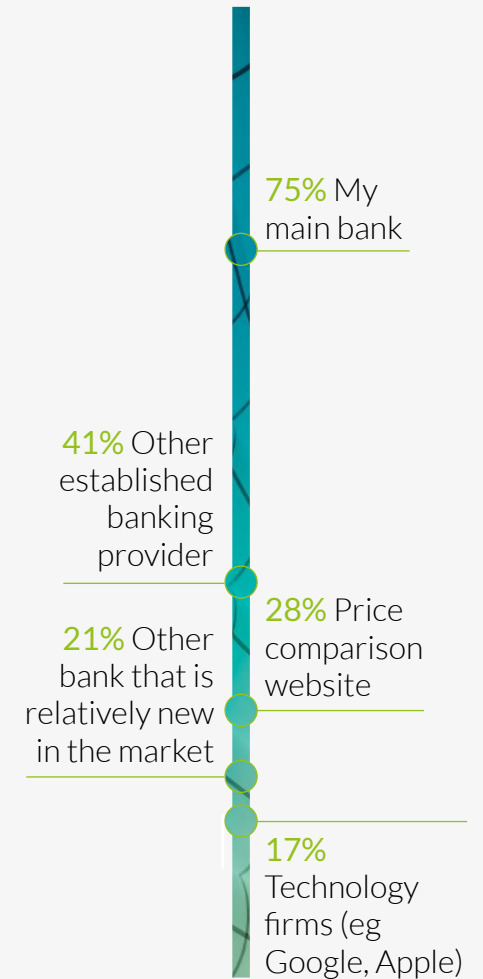
Bulgari has developed its own app to protect personal data and passwords.

savings, discounts and personalised offers. For example, over half of UK consumers would be willing to share information from a smartwatch or fitness band with an insurance company to help calculate the cost of their plan.



Provided and Secured by **WIS@key**

UK willingness towards sharing financial data with different providers



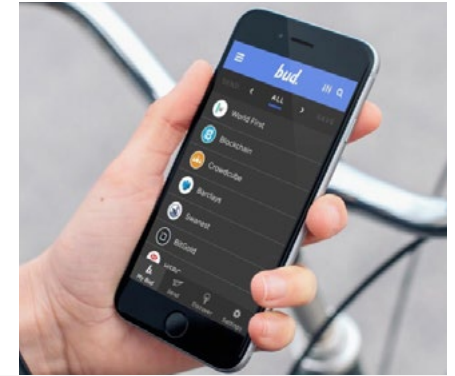
Base: 2,000 internet users aged 16+
Source: Current Accounts, UK 2017

Wearable devices and smart TVs present major opportunities here, but companies will need to incentivise consumers to raise their ownership levels as according to Mintel, less than one in 10 French, German, Italian and Spanish consumers own a smartwatch. Streaming TV

device ownership remains low too, with ownership peaking at 13% in Italy and Germany (respectively), followed by 11% in France and 9% in Spain.

Bud, a technology platform based in the UK, links users' financial services together in a single interface. Bulgari

has developed its own app to protect personal data and passwords—a customised version of WISEID from Swiss eSecurity firm WISEKey. Meanwhile, THERO is a physical desktop device out of Spain that gives online privacy and protection a tangible form.



Bud enables users to view and interact with all their finances in one place



THERO is a 3D-printed desktop device that allows users to switch between encrypted communication methods simply by turning a dial.



Consumers are open to data exchanges in return for savings, discounts and personalised offers.

Where Next?

As data creation grows in new forms—whether it is biometrics, geolocation apps or the Internet of Things (IoT)—more trusted outsider brands will enter the protection market. But we'll also see children and teens lead an education drive amongst parents in regards to data privacy. Families will also be a focus for the increasingly on-trend desire for more private leisure capsules of digital downtime by way of visceral, sensory or slower, more mindful, analogue experiences. The key issue

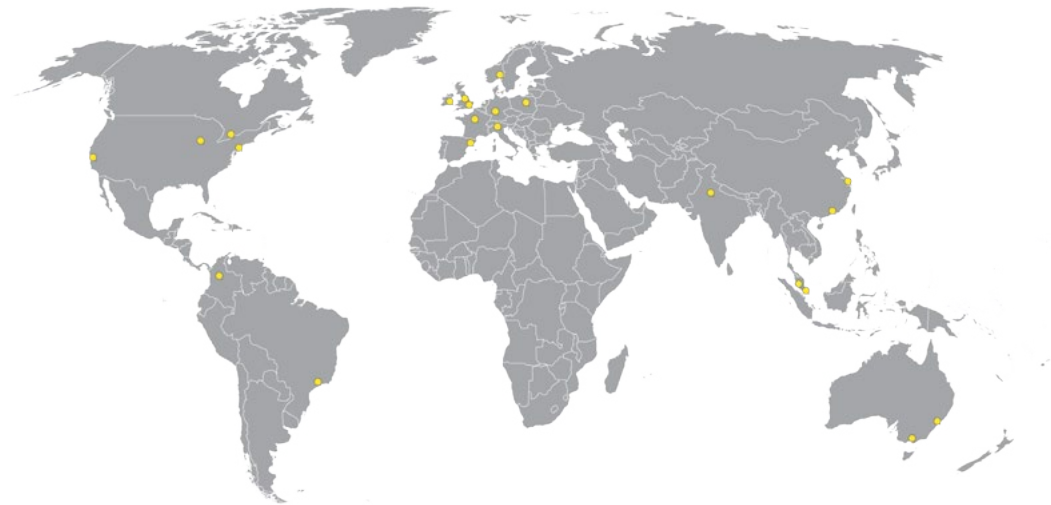
here is that brands are suddenly confronted with legislation that makes the future of online advertising about an unknowable user.

Looking ahead, newly empowered consumers will benefit as brands solicit them. Whilst discounting for data schemes will mainstream, we'll also see more creative data-sharing initiatives that help consumers to save time and better monitor their health or their utilities spending.



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TEENAIDERS

Teens are increasingly defined by **anxieties around image, health and work**, and are looking for brands to alleviate the pressure and help them build both their confidence and prospects.





According to Samsung, "Selfie Mode gives you the tools to take your selfies to another level creatively".

There is a growing understanding of the digital pressures facing young people and how parents are adding to these problems.

What's **Happening** In 2018?

Pan-European studies reveal the economic, digital and emotional pressures facing today's youth, demanding a response from consumer-facing brands. Whilst according to Eurostat, youth unemployment across the EU-28

has fallen from 23.9% in March 2013 to 16.9% in July 2017, these rates remain double the rates for the general population and we're starting to see automation encroach on youth employment prospects. Many job categories are under threat, with

youth-focused roles, telemarketing and cashier roles proving the most vulnerable.

There is a growing understanding of the digital pressures facing young people and how parents are adding to these problems. In the UK, studies

by Ofcom and the University of Sheffield have shown that the time spent online by those aged 8-15 has doubled in the past decade and that spending just one hour each day on social media reduces happiness indexes by 14%.

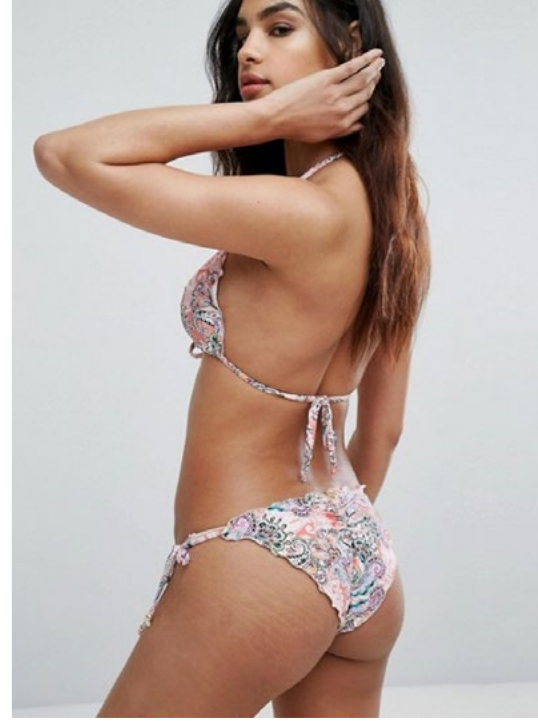
These emerging pressures around online bullying, body image (filters and functions like Samsung's Selfie Mode have become the norm) and academic stress are contributing greatly to an 18% global growth in depression over the past decade,

according to the World Health Organization (WHO). By way of response, we're seeing more mental health and well-being charities—like the UK's YoungMinds—focused on the needs of today's youth.

Why Consumers Will Buy Into This

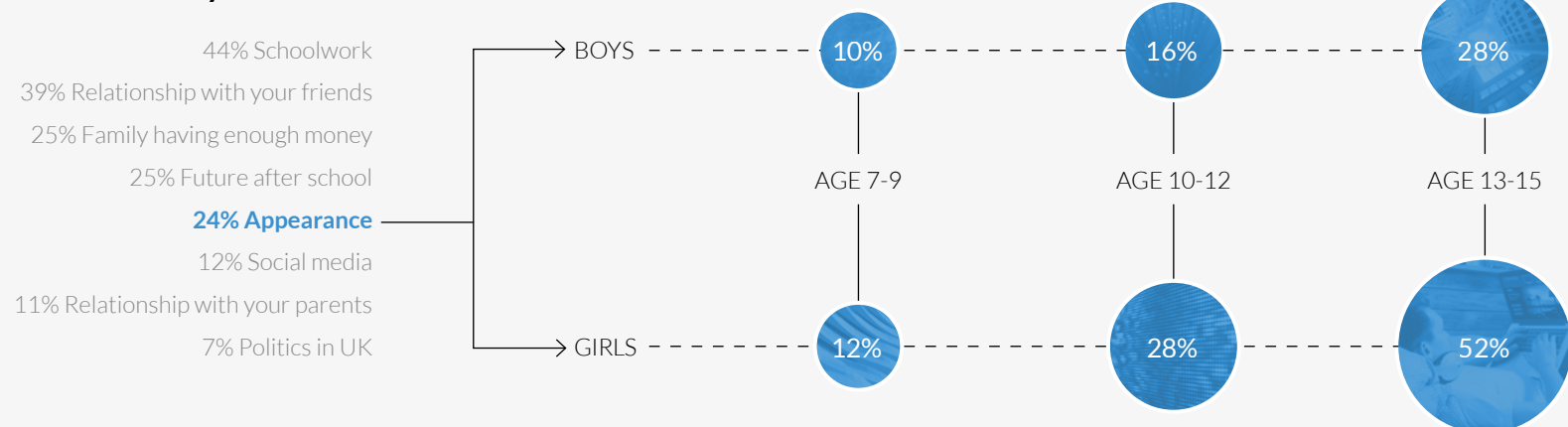
Mental health issues are becoming more prevalent amongst teens. Mintel research finds a quarter of 7-15 year olds are concerned about their future after school, with the same number concerned about their appearance. And social media usage is being held as a main contributor. In the UK, the Royal Society for Public Health has

revealed that four of the five most popular forms of social media have been found to harm young people's mental health, with Instagram highlighted as the most damaging. While in Ireland, 72% of Irish 13-19 year olds say that body image has caused them stress or difficulty, with 43% saying social media has done the same.



The ASOS 2017 campaign left its models unairbrushed, with stretch marks, cellulite and all the other skin 'perfections'.

Sources of anxiety for UK children and teens



Base: 1,500 internet users aged 7-15
Source: Lifestyles of Children and Teens UK 2017

The emerging issue is that even before the younger generation was able to walk or talk, their every move was being documented online by their parents and family members. Indeed, according to Ofcom, four in 10 UK parents share photos of their children on social media, with half of these parents posting photos at

least once a month. However, switching off completely from digital platforms is not the answer as these channels can be utilised to raise awareness and quickly connect young consumers with the help they need.

Brands are recognising the role they can have in improving

mental health by highlighting greater diversity in terms of the models they use and the depictions they portray. British online fashion and beauty store ASOS is being praised on social media for featuring models with stretch marks; meanwhile, IRIS ON is a Dutch scheme that offers children a chance to fight bullying through WhatsApp.



IRIS ON allows young consumers to talk to a chatbot called Iris, offering children a chance to fight bullying.

Where Next?

Young people will expect brands to offer support when it comes to their health and well-being, as well as get more involved in their education and development. With a growing level of attention around the negative impact of social media, this generation will seek to take back

greater control by being more mindful of their usage. They will be quick to call out brands promoting unrealistic beauty ideals and quick to support those embracing diversity. Today's youth are facing an uncertain future and the impact of dealing

with this has the potential to follow them for the rest of their lives if nothing is done now. In 2018 and beyond, brands have an opportunity to step in and provide solutions to help empower this cohort.

With a growing level of attention around the negative impact of social media, this generation will seek to take back greater control by being more mindful of their usage.

What's Happening In 2018?

Consumer distrust in governments and media is spreading to companies, and so is the clamour for truth and transparency in ingredients and behind-the-scenes processes. We'll see greater accountability in politics, media and employment in the form of Claimbuster's AI-backed fact-checking services, Germany's Network Enforcement Act against fake news and hate speech, and the UK government compelling

companies with more than 250 employees to publish their gender pay gap data; and this will extend to the consumer realm. More and more companies will take an 'open kitchen' approach and use their packaging, portals and premises to practise truth and transparency. Expect more brands to follow the pioneering approaches of fast-moving consumer goods (FMCG) companies like SC Johnson, Lush and Method when it comes to

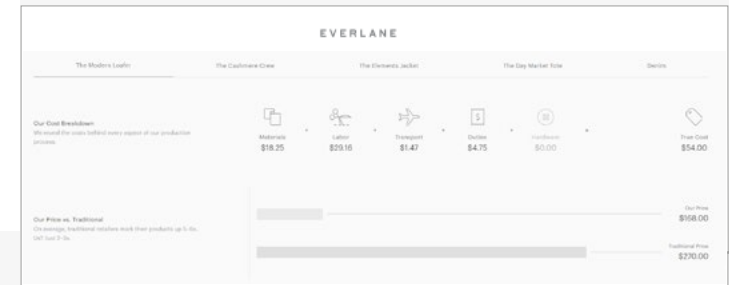


explaining ingredients and sourcing. Other brands to follow include fashion retailers like Everlane and Reformation who provide price breakdowns and environmental scores, and online retail behemoth Amazon offering the ultimate in openness: warehouse tours for customers.

More and more companies will take an 'open kitchen' approach and use their packaging, portals and premises to practise truth and transparency.

Trends in Action

Everlane reveals the true costs behind all of its products, from materials to labour to transportation. Products are then offered, minus the traditional retail markup.



French supermarket chain U took advantage of Snapchat Stories (and the fact they disappear after 24 hours) to demonstrate that its fish is freshly caught.

Lush Ltd. promotes an ethical buying policy.

List of ingredients

Granulated Sugar, Sodium Bicarbonate, Sodium Laureth Sulfate, Bergamot Oil, Brazilian Orange Oil, Cocoa Powder, Aloe Vera Extract, Titanium Dioxide, Lauryl Betaine, *Limonene, Butylphenyl Methylpropional, Perfume

- Natural Ingredients
- Safe Synthetics

*occurs naturally in essential oils.

We do not test our finished products on animals. We also only purchase from ingredient suppliers who do not test on animals. [More](#).



Method discloses the ingredients in all products and the processes they use to make them.

Renault offered a candid view of how its Scenic model is equipped to handle the trials of family life in 'Behind Car Doors', a campaign fronted by two leading Instagram parents.



ingredients

we're not all about appearances, what's inside counts, too. find out what goes in our method bottles.



formulation

we follow the precautionary principle: if there's a chance an ingredient isn't safe, we don't use it, period.



dirty ingredients list

we don't do dirty, here's a list of some ingredients we don't ever use (and why).

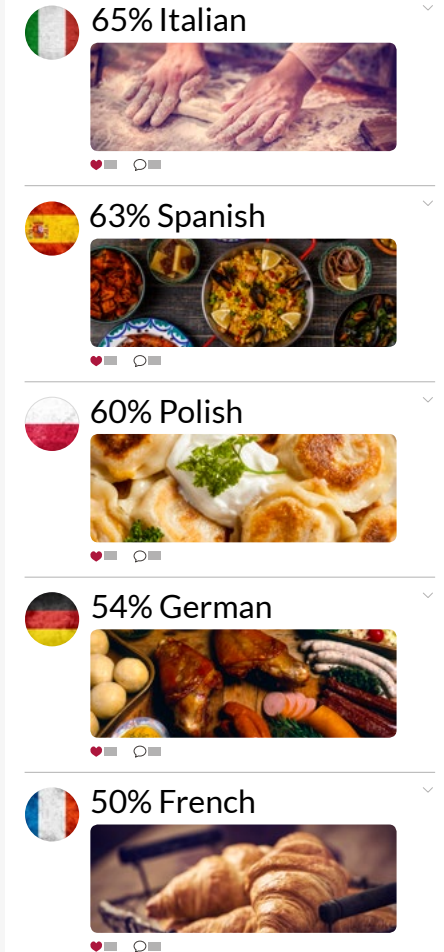
Why Consumers Will Buy Into This



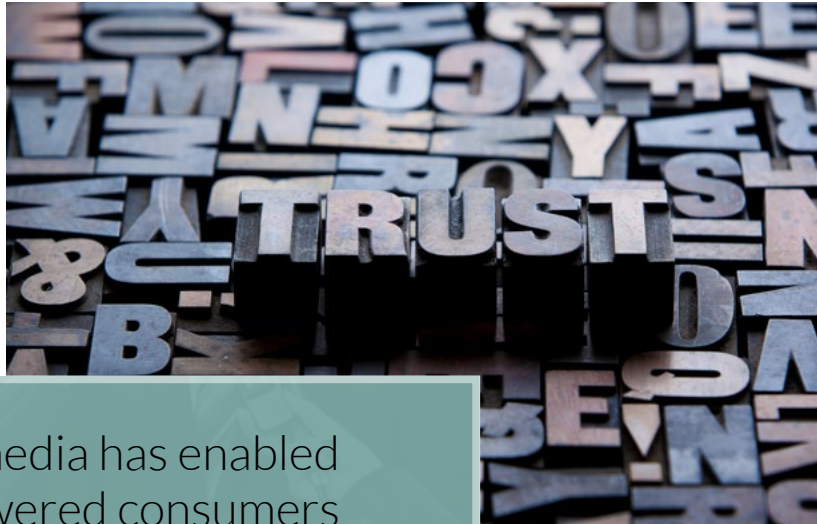
Blind trust in companies or institutions is a thing of the past. According to Mintel research, just 25% of those who have used a device to access national newspapers online say that the content on these websites is trustworthy. Social media has enabled empowered consumers to instantly question and take brands to task when their actions cause concern or confusion. Consumers are utilising the tools at their disposal to keep an eye on what companies are doing, with Mintel research showing that at least half of Europeans agree the increased

ability of consumers to communicate and find information via social media and the internet is forcing companies to be more transparent. However, many consumers—especially at the younger end of the spectrum—expect companies to take a more proactive, high-tech approach when it comes to increasing transparency. One in five 20-24-year-old Brits would like online retailers to have videos showing how clothes and shoes are made.

European agreement that social media is forcing food and drink companies to be more transparent*



*Consumers were asked if they agreed that the ability to communicate and find information via social media/the internet is forcing food and drink companies to be more transparent.
Base: 2,000 adults aged 16+
Source: Mintel Reports 2017



Social media has enabled empowered consumers to instantly question and take brands to task when their actions cause concern or confusion.

Brands are responding to this demand for transparency, as in the automobile sector, Renault has hired two popular Instagrammers for a year-long campaign to show how its latest Scénic vehicle can handle the rigours of family. Meanwhile, French

supermarket chain U's 2017 campaign uses Snapchat Stories to demonstrate just how fresh its fish are. And Vodafone has unveiled plans to block its advertising from appearing on fake news websites or those that contain hate speech.

Where Next?

Quantified and qualified facts will be in high demand and consumers will expect greater transparency as standard, whether this is related to manufacturing processes or how efficacious a product is. In terms of marketing, there will be a push for greater authenticity; consumers are set to see behind-the-scenes revealed through creative campaigns that put employees to the fore and capitalise on their years of expertise.

With consumers more able to question and query the actions of brands, radical transparency will be the watchword for 2018 as they try and show they can be relied upon as trustworthy.

Radical transparency will be the watchword for 2018 as brands try and show they can be relied upon as trustworthy.

