



## *Fluid lives*

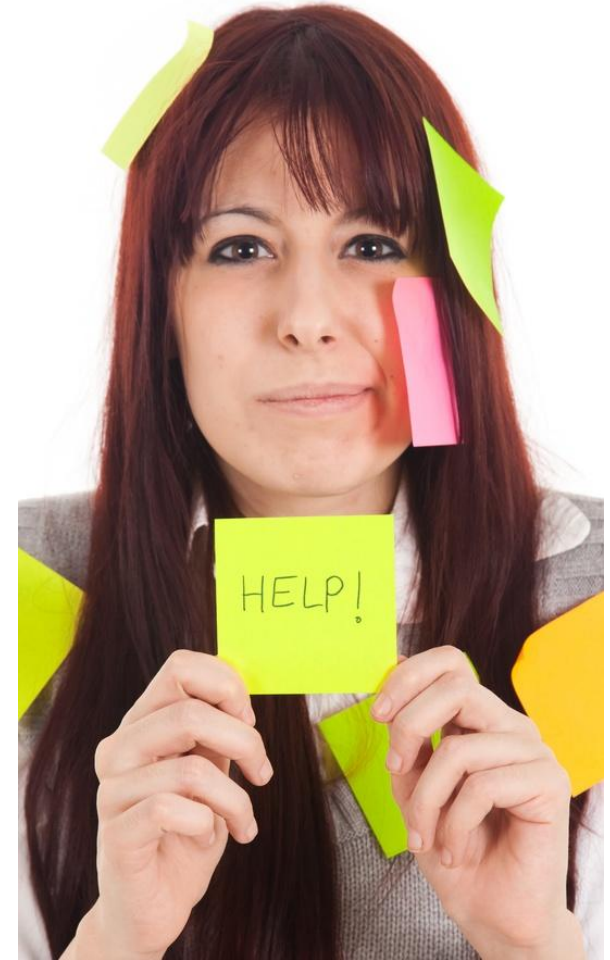
**“I want to manage my busy life and make sure that I am at my best for whatever the day presents”**

# “I want to manage my busy life and make sure that I am at my best for whatever the day presents”



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- Life is still busy and finding time to fit in everything we want remains a challenge; people still need help navigating the day effectively and solutions that save time or remove complexity continue to resonate strongly with today's consumers. Convenience is still king. But, financial pressures mean that this cannot come at any price.
- For some, life has slowed as the economy has slowed and work pressures have eased, making moments to slow down and take time out more accessible. For others, pressures remain high and the pace of life still feels relentless, time out is needed to unwind or recharge.



# “I want to manage my busy life and make sure that I am at my best for whatever the day presents”



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- Irrespective of their pace of life, people have become more aware that maintaining energy levels is critical in order to get the most from what the day presents; avoiding peaks and slumps, and maintaining concentration and focus are top of mind.
- Food and drink plays a critical role and people are becoming more sophisticated in their approach to managing their mental and physical energy needs.



# People still look for convenience, but propositions are evolving to give people greater control and flexibility



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## Growth of fresh meal kits

Meal kits, often incorporating fresh pre-prepared ingredients, are growing in popularity as they offer a combination of convenience and freshly cooked foods. Premier Foods saw sales of meal kits in the UK increase almost 9% in value year on year in 2011.<sup>1</sup>



## Rise of 'modern scratch'

The concept of 'modern scratch' is gaining momentum, where consumers are looking for short cuts that allow them to enhance home cooking results and achieve these with less effort. Knorr stock pots have driven category growth since their launch in 2008, with new variants added in 2011.<sup>2</sup> They allow consumers to achieve depth of flavour in their home cooking quickly and conveniently.



For some, as time pressures have eased, time has freed up for home cooking. According to The Good Food survey, 60% of UK families now cook from scratch at least four times a week.<sup>3</sup>

# As people fall back into old routines, they look to resolve the tension between 'on the go' needs and making good choices

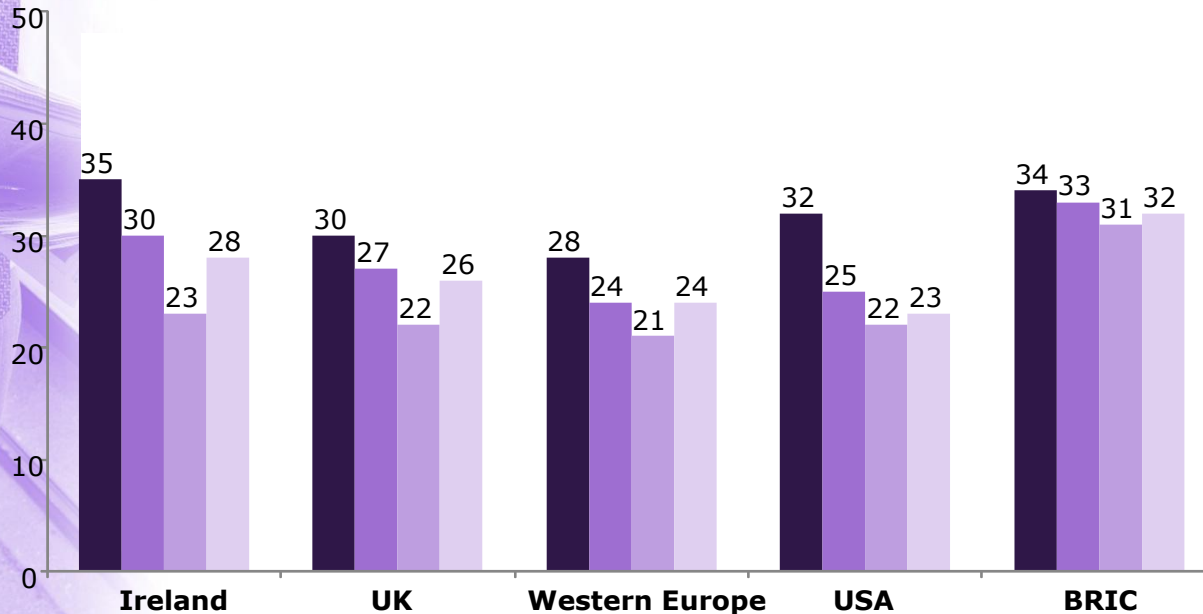


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## 'I eat on the go more than I used to'<sup>1</sup>

% Agree

2008 2009 2010 2011



Globally, sales of healthy snacks are forecast to rise by more than a fifth by 2014.<sup>2</sup> 82% of CPG senior executives believe that society's shift towards healthier living is leading to demand for healthier snack options.<sup>3</sup>

# Managing energy levels is becoming increasingly sophisticated and a primary need



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## Energy shortages remain a key concern

According to a 2011 survey from Centrum, 68% of Irish consumers feel they don't have enough energy to enjoy life and do what they want to each day.<sup>1</sup> Similarly, an Amicus survey showed that 57% of people in the UK said that long working hours mean they are too tired to properly enjoy time off with their family.



## Satiety and slow release energy from niche to mass

Satiety foods that offer slow release energy are moving more into the mainstream as large retailers launch new ranges that offer sustained and balanced energy and nutrition. According to Mintel, new satiety product launches increased 40% in Europe from 2010 to 2011.<sup>3</sup>





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## Key takeaways

- Convenience is still highly valued, but it has become a hygiene factor that people expect rather than see as added value. Smart, simple ideas at affordable prices that lead to better solutions have high appeal.
- People are more open to being helped to navigate choice and guided to choices that make meal planning, preparation and budgeting easier to manage.
- People have become more attuned to the role that food and diet plays in helping them get the most from what the day presents; approaches have become more sophisticated and are increasingly focused on the natural qualities of food.

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## Drivers

**Proliferation of new media and telecommunications technology and devices**

**Changing working patterns**

**Increasing mobility**

**Continuing economic uncertainty**



## Sub-trends

### **Simple by design**

Solutions that reduce complexity and save time

### **Guided choice**

Ways to make good choices more quickly and easily

### **Conveniently there**

Improved convenience and portability

### **Peak performance**

Managing your physical and mental performance during the day

### **Winding down**

Slowing down and escaping to recharge the body and mind





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## **SUB-TRENDS**

# HOW IS THE SUB-TREND EVOLVING?

## Simple by design



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### Solutions that reduce complexity and save time

The desire for simpler solutions remains strong amongst people who increasingly struggle to fit everything into their day. Consumers are welcoming innovative solutions that reduce cooking or preparation time but also promise efficient portioning and healthy nutrition.

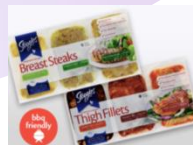
## FROM

**A more practical sense of simplicity and a desire for greater function from everyday design**

*Wine That Loves claims to take the guesswork out of food and wine pairing, US*



*Steggle marinated meat portions in individual pouches of different flavours, Australia*



**Marinated Pouch Packs.**

Some for now, some for later

## TOWARD

**Design solutions that reduce complexity in cooking processes and deliver convenient and healthy nutrition**

*Lékué's innovative kitchenware enables fast and healthy home cooking and preserves nutrients, Spain*



*Scratch meal kits contain fresh ingredients for a speedy and healthy short cut to home cooking, GB*



*Vapza Food's pre-packaged steamed beetroot cubes enables convenient healthy cooking, Brazil*



# SUB-TREND: Simple by design

*Solutions that reduce complexity and save time*



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## Healthy convenience, Brazil



Vapza Foods' ready to use beetroot cubes enable people to prepare quick and healthy meals with minimal effort. The product does not contain preservatives and is packaged in several small portions so that small households can reduce waste.

## Fresh meal kits, GB



After successfully piloting in the UK, Scratch are re-launching a revamped range of fresh meal kits in 2012 – with a broader range of recipes and lower price points to meet tighter budgets. The kits come with pre-prepared fresh ingredients and most offer at least 2 out of the '5 a day' fruit or vegetable portions.

## Kitchenware innovations, Spain



Lékué's innovative platinum and silicone kitchenware collection is designed to simplify and speed up the cooking process. This includes new silicon steaming technology that conserves high levels of nutrients. Users can also consult Lékué's website on cooking tips and recipes.

# HOW IS THE SUB-TREND EVOLVING?

## Guided choice



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### Ways to make good choices more quickly and easily

The growing choice of products available and increased access to product information through digital technologies is making it more challenging and time consuming to make the right choice. Shopping environments and applications that make this process easier are increasingly appreciated by energy and time pressured consumers.

## FROM

### Seeking out information to make better informed choices

*Shroomies is an iPhone app that provides nutritional information for 80,000 food items, USA*



*Barcode scanning apps help people make informed choices, Germany*



*Kraft kiosk uses face recognition to make intelligent meal recommendations, US*



*Carrefour organises products to help shoppers find ingredients for home meals easily, France*



*Vending machine that tells you what the best drink is for you, Japan*



## TOWARD

**Looking for help in collating and interpreting information, and recommendations based on personal characteristics**

## SUB-TREND: Guided choice

*Ways to make good choices more quickly and easily*



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### Kraft kiosk's intelligent meal recommendations, US



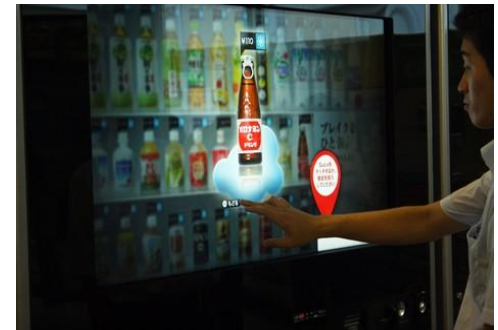
In partnership with Intel, the Kraft intelligent kiosk uses face recognition technology to assess the age and gender of customers and based on this, and the time of day, makes intelligent meal recommendations and directions to relevant products in store.

### Simplified choices for shoppers, France



Some branches of the Carrefour supermarket chain in France have begun stocking home cooking products by brand, not by category, to help shoppers find, mix and match the components of a home-cooked meal more easily.

### Vending machine that tells you what to drink, Japan



Vending machines that use facial recognition technology to make drink recommendations to customers have been introduced in Japan. Recommendations are based on extensive market research and also vary according to the time of the day and the temperature.



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# HOW IS THE SUB-TREND EVOLVING? Conveniently there

## Improved convenience and portability

As lives are becoming more mobile, people continue to look for products and services that they can access when and where they need them most – however, they are no longer willing to trade convenience for health. Mobile technologies are increasingly being used to assist on the go convenience.

## TOWARD

More ubiquitous sources of access and rising use of GPS to find what you need when you need it

## FROM

Pop-up stores, 'fresh' vending and Twitter give greater convenience

Vending takes a 'fresh' approach with fresh produce, Japan



Vending machine dispenses freshly baked baguettes for access to fresh bread outside opening hours, France



Pop up café takes orders via mobile, Ireland



Smart phone apps enables city dwellers to track the location of new food trucks, Australia



Detox juices and meals delivered to your door, GB



## SUB-TREND: Conveniently there

*Improved convenience and portability*



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### Detox delivered to your door, GB



Launched by a model in 2011, Raw To Door delivers freshly made raw food and juice packages direct to people's doors, in line with ready made cleansing meal and detox plans.

### Fast food tracking smart phone apps, Australia



The City of Sydney recently announced licenses for late night food trucks to spice up the city's late night dining. Smart phone apps enable people to locate the trucks around the city using GPS positioning.

### Pop-up café takes orders via Twitter, Ireland



As part of a promotional road show, Electric Ireland created a Twitter-powered pop-up café, offering 24 food and drink options displayed inside small boxes. Users tweeted #tweetcafe followed by the snacks they wanted. When the order was ready for collection, the user's Twitter profile appeared on a large screen and the door containing the treats opened.

# HOW IS THE SUB-TREND EVOLVING?

## Peak performance



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### Managing your physical and mental performance during the day

In an increasingly pressurised world, it is critical to deliver your best at all times. People are looking for ways to maximise their performance but with an increased interest in healthy and natural sources of energy that maintain constant energy levels rather than giving short highs.

## FROM

**More targeted types of energy and diagnostics that help select the right solutions**

*Recharge in your lunch break with an intravenous energy drip, Japan*



*Gatorade offers specific energy benefits targeted to different times of day and energy needs, US*



*100% natural energy drink designed for women, Sweden*



*AeroShot's inhalable energy shot delivers a fast acting boost, US*



*Protein based drink that improves energy levels and provides long term health benefits, Japan*



## TOWARD

**Innovative delivery systems and fast acting or multi-benefit formulations**



## SUB-TREND: Peak performance

*Managing your physical and mental performance during the day*



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### Energy drink designed for women, Sweden



Femme Natural Boost was launched in 2011 and is aimed specifically at women. It is 100% natural, and contains ginseng, guarana, citrus juices and antioxidants. It comes in a rose-tinted can to appeal to female consumers.

### Inhalable energy shot, US



The AeroShot is a lipstick-sized inhaler that delivers an energy boosting vapour containing 100 milligrams of caffeine - equivalent to a cup of coffee - along with B vitamins and Niacin. The inhalable formulation means the boost can be felt almost immediately. The product is being marketed by Breathable Foods.

### Energy boost with long term health benefits, Japan



In Japan there is a growing range of products (including bottled water) containing citrulline, an amino acid that can widen blood vessels, improve circulation and break down lactic acid in muscles. These products offer long-term health and energy benefits, the opposite of a quick hit.

# HOW IS THE SUB-TREND EVOLVING?

## Winding down



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### Slowing down and escaping to recharge the body and mind

Consumers are increasingly in need of time out for themselves. As the stresses of today's world deepen and technology constantly connects people to a busy world outside, there is an increased desire to take time out. There are opportunities for brands to support people in their quest to slow down, unwind and escape.

### TOWARD

Products that offer relaxation, recharging or repairing the mind or body

### FROM

New techniques and active ingredients to help us slow down

Drinks to slow you down, Canada



Sleep concerts with unlimited ice cream and pillows, Japan



Mobile signal blocking handkerchief that allows a break from constant connectivity, USA



Relaxing drink with added nutrients to recharge the mind and body, Germany



"Sleepy milk" with high levels of melatonin to promote restful and restoring sleep, New Zealand



## SUB-TREND: Winding down

*Slowing down and escaping to recharge the body and mind*



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### Little breaks from connectivity, USA



The Phone Kerchief fabric blocks phone signals, allowing people to take a break from connectivity and demonstrate that they are devoting all their attention to the people they are relaxing with.

### Sleep milk to promote restorative rest, NZ



Synlait is launching a new, improved version of 'sleep milk', which is harvested from cows at night time. It naturally contains much higher levels of melatonin to promote deeper sleep – allowing the body to rest and repair naturally.

### Performance boosting relaxation drink, Germany



Rotbäckchen is a brand of organic and sugar-free fruit juices, enriched with specific mixtures of vitamins and minerals to improve mental and physical performance. Its new product for 2012 is called 'Peace and Strength' – designed to be consumed throughout the day whenever you need a revitalizing break.

# COUNTRY RELEVANCE

## How does this trend play out in Ireland and GB?



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This trend is well established in both markets, but different circumstances mean it has evolved in distinct ways in both.

### Ireland

- Irish consumers have gone through a period of adjusting to new lifestyles pressures and priorities. Where previously many had experienced a struggle to keep up with others, a drop back in the pace of life means this is less of a priority.
- Where time pressures have eased, this has led to positive knock-on effects for many, such as more time to focus on mindful home cooking. Convenient solutions that speed up home cooking are highly valued – but must be at affordable price points
- Energy has become more top of mind across the board. There is an increasingly recognition that maintaining balanced energy levels throughout the day is a priority – whether to meet the demands of work, or to keep up with the pressures of family life.

### Great Britain

- For consumers in GB, there remains a perception that the pace of life has increased – for some, as a result of longer working hours in more demanding economic times.
- This is leading many to adopt strategies to control or protect their time for things that are important in their lives – opportunities to wind down and take time out are limited but fiercely defended.
- Convenience is still a strong priority – particularly on the move – where health is playing a bigger role in choices.
- Switching off and winding down, particularly in urban areas, remains a priority, but is a growing challenge in increasingly hectic lives.

# COUNTRY RELEVANCE

## How does this trend play out in Ireland and GB?



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### Ireland

#### Simple by design

Solutions that reduce complexity and save time



#### Guided choice

Ways to make good choices more quickly and easily



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Improved convenience and portability



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**SHOPPER DIMENSIONS**

# SHOPPER DIMENSION

## How does this trend play out for shoppers?



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### Navigating choice in retail environments in tune with consumers' preferences

The proliferation of information and choice in retail environments is becoming overwhelming. Though more choice is positive, making the right choice has become harder.

Retailers are becoming more adept at helping people navigate choices in store; by offering them more relevant choices based on their preferences or guiding them through multiple options to help them make the right choice for their needs.

This is likely to become more relevant as choice multiplies. In store and mobile technologies will continue to provide the tools to facilitate curated choices. Similarly, new technology such as Augmented Reality is adding a new dimension to the online retail experience and allowing people to get a much better understanding of products virtually than has ever previously been possible.

### Glimpses of the future



#### Recipe curation, Germany

Kochhaus is the first supermarket organised by recipe, not ingredient. This helps shoppers to get straight to the specific foods they need for a meal, rather than struggling with thinking about what to cook and then find all the different ingredients.



#### In store iPad for tailored navigation, Sweden

In the Miele's store in Vlanen, people are given an iPad to use while browsing. After entering basic information, the iPad creates a browsing tour designed to help them navigate products based on their needs and preferences.

# SHOPPER DIMENSION

## How does this trend play out for shoppers?



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### Stores are less constrained by traditional bricks and mortar

Shopping is no longer limited by location. Technology means a rising number of products and services can now be 'conveniently there'. Increased access to mobile internet and with the emergence of 4G technology on the horizon, the retail experience will continue to be freed from physical and online channels.

Technology is expanding convenience propositions into ever more convenient locations – such as subways or bus shelters - and allowing shoppers to purchase a wider range of items than traditional convenience formats, virtually.

New mobile technologies such as location-based services and GPS location based tagging are blurring the boundaries between real and virtual shopping experiences. In addition, geo-tagging is allowing promotional messages and communications to be virtually 'tagged' to a location to be picked up by consumers using a smartphone as they pass by.

### Glimpses of the future



**QR code store fronts, Korea**

Electronics retailer Bic has a large QR Code on its storefronts, so even when the shop is closed, shoppers can scan the code on their phones and they are immediately directed to the online store.



**On-the-go shopping via a smartphone, Australia**

Supermarket chain Woolworths has launched a virtual supermarket in one of Sydney's central train stations. Consumers can scan the images of products, pay for them through their phones and have their purchases delivered to their homes.





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# POINTS TO PONDER

## Consumer

- What kind of formats would help people to better manage portions for cooking or help food preparation?
- How might improvements to on-pack information help people to make purchase decisions more easily? How can technology be used to further enhance how this information is delivered?
- How can you help people understand how ingredients or dishes can be combined to make a balanced meal?
- What ingredients can be added to make meals that improve mood or recharging the mind?
- How can you offer more sophisticated energy benefits in your products?

## Shopper

- How can you demonstrate quality and experience of products in virtual environments?
- How can you use technology to help consumers find your products? How can you direct them to the right stores and even aisles where they are stocked?
- Are there better ways of organising products in-store that will help people to find the ones they need or, create nutritional meals more easily?