I want to use my time to be as productive and sociable as possible, flowing from one thing to the next - and helped, not hindered, by tech...
Americans own a smart speaker or robot assistant as of April 2018, up 130% from 2017

1 in 5

1. **Blurred dayparts**
2. Social shopping
3. **On-the-go**
4. Living in the cloud
5. Invisible and seamless solutions
6. ‘Decluttering’
7. D2C delivery
8. Eat & drink
9. Anywhere
10. Automated shopping
11. Fluid routines
12. Social shopping
13. Living in the cloud
14. Invisible and seamless solutions
15. ‘Decluttering’
16. D2C delivery
17. Eat & drink
18. Anywhere
19. Automated shopping
20. Fluid routines

Supported & enabled by tech

Changing work, ‘gig economy’, and home life

Maximising time

Smart environments

Eat & drink anywhere

Fluid routines

Gig economy

Maximising time

Smart environments

On-the-go

Decluttering

D2C delivery

Invisible and seamless solutions

Supported & enabled by tech

Changing work, ‘gig economy’, and home life

Fluid routines

Maximising time

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

The further East you travel, the greater the desire for simplifying life’s complexity…
“It is important for me to sometimes disconnect from online and mobile communications.”

East v West generational differences are clear.
**WHAT’S DRIVING THE TREND?**

**Growing digital connectivity**

This macro driver enables and drives Fuller Lives. The youngest generations have never experienced a life devoid of data and digital lifestyle solutions.

35% of global consumers actively “wish there were more technology tools and apps that would manage their life”, up 5% from 2015, while 58% say they are on the internet constantly throughout the day (vs 49% in 2015).

**Changing lifestages and household structures**

Changing career trajectories, household structures, and gender roles all point towards flexible lifestyles that value productivity and sociability above the traditional markers of success such as home ownership, marriage and children.

By 2020, the number of single-person households is estimated to rise to 415 million globally, 18% more than in 2016. 1

**Economic empowerment of women**

**Rapid urbanisation**

Urbanisation brings with it opportunities to maximise living; more people seeking creativity and collaboration, in dense and digitalised spaces.

By 2050, two-thirds of the world’s population will live in cities, compared with just over half today.
WHAT'S DRIVING THE TREND?: DRIVERS

Growing digital connectivity
75.4bn different connected devices worldwide expected by 2025.¹

Changing lifestages and household structures
By 2040, there will be an increase of 25% in single person households in the UK.²

Rapid urbanisation
Between 2016 and 2030, the number of cities with 500,000 inhabitants or more is expected to grow by 80% in Africa and 30% in Asia.³

HOW IS IT MANIFESTING?: SUB-TRENDS

Delivery 2.0
Direct-to-consumer takes on new meaning as goods can find their way to any convenient, and changing, personal location, not just personal address.

Flexi-food
Eating and drinking occasions reshape and shift to suit consumers who seek to maximise their days (and nights), forcing rapid change for food & drink manufacturers and channels.

Invisible Digital
Algorithm-based living means less exciting purchase decisions are easily outsourced for consumers.

Living Workplace
The blurring between places for work, retail and social life leads to a reimagining of the workplace as an enjoyable and lifestyle-enhancing destination.

Techlash
A counter-subtrend in many ways: Consumers become more averse to using technology and sharing their personal information, seeking meaningful and human connections to maximise living.
HOW IS THIS MANIFESTING?
Through the eyes of our Streetscapers…

“Late night dining is still present in old and young Malaysians which makes 24/7 services or extended hours appreciated today, however, few businesses are being innovative enough with their offerings to deliver to exactly where the person is!”

Lavina, Malaysia

“Lotte Mart continuously integrates technology into its shopping experience to provide a better and more convenient experience for the consumer”

Gagyeong, South Korea

Direct-to-consumer takes on new meaning as goods can find their way to any convenient, and changing, personal location, not just personal address.
Smart locks that can be opened with one time passcodes free up consumers

Wallmart has partnered with August SmartLock to enable its drivers to use one time codes to enter customers’ homes to unpack and refrigerate any perishable food. Customers can track the delivery and even watch it via smart cameras.

UBER’S LATEST PROMISE TO THE MAJOR URBAN CENTRES IN WHICH IT OPERATES IS THAT DELIVERY OF GOODS VIA UBER WILL ALWAYS TAKE UNDER 30 MINUTES FROM NOW ON. UBER IS NOW THE WORLD’S LARGEST FOOD DELIVERY BUSINESS.

(Uber CEO Dara Khosrowshahi, 2018)

TAGGING EVERY CORNER OF THE WORLD IN A UNIVERSALLY ACCESSIBLE SYSTEM SO THAT UNMAPPED AND UNREGISTERED LOCATIONS CAN BE ACCESSIBLE

WHAT3WORDS PROVIDES A PRECISE AND SIMPLE WAY TO SHARE AND ACCESS LOCATIONS MORE QUICKLY AND ACCURATELY ACROSS THE WORLD, MAKING NO ADDRESS OFF-LIMITS FOR DELIVERY.
HOW IS THIS MANIFESTING?
Through the eyes of our Streetscapers…

“Supermarkets are always trying to innovate for speed … making life easy for shoppers no matter what the size of their basket”

Gagyeong, South Korea

“Whole Foods stores offer so many different types of shopping experience, whether you want to grind your own peanut butter there and then, eat fresh on site, or get groceries delivered to another place later on.”

Vincent, USA

Eating and drinking occasions reshape and shift to suit consumers who seek to maximise their days (and nights), forcing rapid change for food & drink manufacturers and channels.
Meal kits (scratch and semi-scratch cooking solutions / subscriptions) were the fastest growing food channels in the US in 2018, with total sales of $2.2bn (Nielsen, 2018).

Algorithm-based pricing based on demand fluctuations pricing meals at differently at peak times.

Gebni discounts fluctuate in real time and can range from a minimal 2% to a substantial 35%, even on a $10 item.

Strategically placed meat vending machines in South Korea cater to late solo diners.

Specifically adapted to fluid routines and small households as they provide one person portions.
Algorithm-based living means less exciting purchase decisions are made automatically, and physical retail automates the point of purchase so consumers can live seamlessly.

**INVISIBLE DIGITAL**

**HOW IS THIS MANIFESTING?**

*Through the eyes of our Streetscapers…*

“Products and services that do the job for you so you can relax, and get off the phone – that’s what people are looking for”

Marianna, Mexico

“Whoever feels overwhelmed by choices turns to algorithms to make life easier. We no longer really have a choice in the matter, if we want to live life to the full!”

Paul, Germany
Smart bins mean an end to household shortages

GeniCan attaches to your bin and scans items when you throw them away before saving them onto your shopping list or ordering them directly through Amazon Dash.

Microchips which function as swipe cards and payment methods

SJ Railways in Sweden accept tickets on a microchip embedded into your hand, which can be read with a smartphone.

The amount of smart devices connected to the internet is predicted to increase to 75.44 billion in 2025 from 15.41 billion in 2015.

(Statista, 2017)
The blurring between places for work, retail and social life leads to a reimagining of the workplace as an enjoyable and lifestyle-enhancing destination.

**HOW IS THIS MANIFESTING?**

*Through the eyes of our Streetscapers…*

“Santiago is shifting into something more alive, challenging and captivating embracing diversity and becoming a real multicultural city, more people are willing to go out and spend more on leisure.”

Stefano, Chile

“Co-working, community dining, flexibility in your work life… are largely established in Copenhagen as the optimum way of life”

Kiva, Denmark
For employers—come landlords who want to streamline the experience of work and play and inspire workforce communities—for example, Samsung’s Green Tomorrow buildings.

WeWork recently acquired Meetup social community platform for $200 million, strengthening the social aspect (with a 35 million strong member base) of their living/working spaces.

Santander Work Café redesigns high street space for leisure and business

The spaces host talks on useful topics such as finance, marketing or design.
HOW IS THIS MANIFESTING?
Through the eyes of our Streetscapers…

Adults in the UK are spending an incredible 7 hours and 56 minutes a day consuming media, up 9% from 2017.
IPA, 2017

United Kingdom

South Korea has built a National Centre for Youth Internet Addiction Treatment to tackle technology addiction that is causing violence.
Gagyeong, South Korea
Android apps encourage consumers to take control of their digital lives.

Google launched its digital wellbeing initiative to help consumers understand their tech usage and take control of it.

Backlash against targeting and tracking mean consumers want to be forgotten.

Qwant is a search engine that applies strict neutrality rules to search results, they do not use cookies or tracking devices to establish profiles around users.

In 2018, the World Health Organisation officially recognised digital gaming addiction as a mental health disorder.

(WHO, 2018)
IT IS JUST AS GOOD AT MARKETING TO ALGORITHMS AS TO HUMANS

Making algorithms more likely to choose one brand over another in lower engagement categories

ITS PRODUCTS ARE ENABLED FOR ‘WALK OUT SHOPPING’

Using sensors and app user-profiles so that automatic payment for the goods can be processed in breakthrough retail environments

IT HAS ADAPTABLE DISTRIBUTION PARTNERS

Exploiting the new channels of B2B and technologies enabling D2C – the best food and drink products will be those that are most accessible – meaning those that can make it all the way to the individual

WHAT DOES A SUCCESSFUL BUSINESS LOOK LIKE IN 2025?