I want to eat, drink and live to optimise my body’s systems, to feel better than well today and tomorrow...
focus on sleep  
wellness as status  
interrelated systems  
Awareness of gut and neural connections  
mental performance diets
Lifestyle  
navigating health advice
philosophies  
genetic traits
trackers and sensors  
Self-diagnosis & empowered consumers

75% of global consumers say they are likely to buy products or services that will enhance their sense of emotional wellbeing in the next 12 months

Kantar Consulting Global Monitor 2017
"I think having the tools to monitor my own health on a regular basis is very important"
“Not getting enough sleep causes me stress”

Global +1% since 2015

86%

60%

60%

60%

58%

86%

60%

60%

60%

58%

58%

76%

70%

60%

China

Malaysia

Japan

South Korea

USA

UK

Mexico

Germany
Growing digital connectivity

Constant connectivity has unlocked consumer desire to monitor and track health – and now consumers look for proactive ways to improve their scores and connect different aspects of their lifestyle.

Rise of lifestyle diseases

Across the world, rising prosperity and access to convenient, processed foods are leading to a higher incidence of life-threatening health conditions, such as obesity, diabetes, cancer and heart disease.

Redefining of old age

The perception of ‘old age’ is changing drastically, driven by longer life expectancy and increasing wealth and health levels of older populations in many markets.

The global 85-and-over population is projected to increase by 351% between 2010 and 2050, compared to a 22% increase for the population under the age of 65.

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).
WHAT’S DRIVING THE TREND?:

DRIVERS

Growing digital connectivity

The number of connected wearable devices worldwide is expected to jump from 325 million in 2016 to over 830 million in 2020.¹

Redefining of old age

In the US, over 60s will hold 24% of total income by 2020.²

Rise of lifestyle diseases

One fifth of all adults in the world will be obese by 2025.³

HOW IS IT MANIFESTING?:

SUB-TRENDS

Health as Systems

We increasingly understand our body as interrelated systems, and seek to improve them with diet, from the inside-out, and through external, tech-enabled stimulation.

Expert Enhancement

Democratised information leads to an increase in ‘expert’ voices when it comes to health. Consumers are reaching for tech-enabled, personalised and verified solutions for enhancing their diet and wellbeing.

Rediscovering Natural

Health-savvy consumers and innovators are discovering and extracting the true wellness benefits of natural ingredients, giving certain products a surge of popularity or a new lease of life.

Engineering Goodness

Increasing consumer expectation for alternatives to products perceived to be unhealthy is driving the growth of solutions reshaping our overall diet.

Optimising Age

With global longevity increasing and changing population status quo, consumer and government focus on taking proactive measures to live better, not just longer intensifies.
We increasingly understand our body as interrelated systems, and seek to improve them with diet, from the inside-out, and through external, tech-enabled stimulation.

**HEALTH AS SYSTEMS**

**HOW IS IT MANIFESTING?**
Through the eyes of our Streetscapers…

“More and more Koreans are trying to find the balance between work and free-time and to search for the meaning of life.”

Gayang, South Korea

Healthy good quality food permeates everyday life in Denmark. So much so that the international convenience store 7/11 serves Paleo food that promotes digestive functionality and mental alertness”

Kinvara, Denmark
Apps that facilitate mental health

Moodo – using fragrances to create a stress-free and healthy environment

Thync – non-invasive bioelectronic platform which targets certain nerves for electrical stimulation - used to combat mental health illness and autoimmune disorders

Bio-dynamic ingredients to improve physical and mental wellbeing

High Mood Food – natural, fermented and living food, promoting the link between digestion and mental health

WellWell – organic cold-pressed juice with biodynamic (fermented) lemon, a performance enhancer and counter-fatigue drink
Democratised information leads to an increase in ‘expert’ voices when it comes to health. Consumers are reaching for tech-enabled, personalised and verified solutions for enhancing their diet and wellbeing, and mitigating risk.

**EXPERT ENHANCEMENT**

**HOW IS IT MANIFESTING?**

*Through the eyes of our Streetscapers…*

“Word of mouth and influencer endorsement are the key forms of advertising for wellness brands in Mexico.”

Mariana, Mexico

“Consumer choices are made out of practicality and better, tech-enabled insight as they wish to make reasoned and responsible decisions.”

Paul, Germany
iEAT allergen detection system, a portable key ring food scanner and ‘allergen alert’

Processes previously restricted to science labs are now mainstreaming for families

Lumo Lift is a corrective wearable which vibrates when you are hunching or can help correct your stride

Lumo Lift aims to reduce visits to medical specialists and physiotherapists

Google and Fitbit are collaborating to merge Fitbit tracking with electronic medical records for a comprehensive data set for patient and clinicians.
Health-savvy consumers and innovators are discovering and extracting the true wellness benefits of natural ingredients, giving certain products a surge of popularity or a new lease of life.

**HEALTH & Wellbeing**

**REDISCOVERING NATURAL**

**HOW IS IT MANIFESTING?**
*Through the eyes of our Streetscapers…*

“It seems our dark Tualang honey is gaining popularity outside of Malaysia – we understand now it is good for amino acids and vitamins, much like other traditional ingredients here.”

Lavina, Malaysia

“We’re trying to incorporate berries into everything now we’re shown their pigment contains cancer-fighting enzymes.”

Lucy, UK
Major health foods retailer Planet Organic embraces Ayurvedic anti-inflammatories and antioxidants

Traditional Eastern medicinal herb turmeric (and related curcumin) now features in products as diverse as popcorn, to tea and coffee, granola and chocolate

Increasingly popular health influencer profiles highlight the most innovative and beneficial natural extracts

Like @realfoodology, (Courtney Swan) who has gathered 113k followers since she began her online campaign against antibiotics
How is it manifesting?

Through the eyes of our Streetscrapers…

“Food and drink in Japan occupies a strange place in 2018. In general, consumers are inclined to eat at cheaper restaurants — McDonald’s has seen a massive sales spike in recent years — although interest in more expensive and novel alternatives is also sky rocketing”

Patrick, Japan

“Green restaurants and cafes began opening all over Copenhagen from the end of 2016 and have become hugely popular. ‘Green restaurants and cafes’ count as places that have a strong focus on health-oriented alternatives to traditional dishes, often lab-grown”

Kinvara, Denmark

Increasing consumer appetite for alternatives to products perceived to be unhealthy drives growth of solutions reshaping our overall diet.
Identifying plants that blend like egg

Given the vilification of high levels of cholesterol found in eggs, and therefore mayonnaise, JUST mayo’s yellow split pea formula is true engineered goodness.

Vegan seafood: New Wave Foods and Ocean Hugger Foods enter US institutions as part of the ‘Healthy for Life 20 by 20’ initiative

Vegan prawns and plant-based raw tuna are free from marine toxins, high mercury levels & contaminants found in polluted ocean fish farms.
HOW IS IT MANIFESTING?
Through the eyes of our Streetscapers…

“In the UAE We see younger generations all very health conscious compared to the baby boomers in the way they eat and their choices, older generations take a smaller but growing interest in where their food comes from and the health effect of their everyday choices”

Zaina, UAE

“There is a recognized respect in older generations’ ways of life, returning to farm and rural settings is increasing, and Jeju Island, a Korean vacation island, has become a dream destination for many young Koreans to realize the ideal slow-lifestyle exemplified by older generations”

Gangyeong Seo, South Korea
Chinese dairy giant Mengniu is growing sales by 20-30% this year with age-targeted product launches. ‘Future Star Growth Milk’ teamed up with Disney Shanghai to tap into the 8-10 years and early adolescent market.

Chinese restaurant Kaze no Oto has developed new cooking methods to cater to the country’s aging population. The ‘Seniors’ menu at this restaurant is processed, supplemented with enzymes and remoulded into original form, making it easier to chew and digest.

This year, Hong Kong hosted its first ‘GeronTech’ summit, exploring ageing and technology to find solutions for the market’s ‘super-aged’ population, funded by government and private players.
IT TAKES A FRESH LOOK AT AGE AND LIFESTAGE

Food and drink can be the key to unlocking and activating the natural wellness our own body systems can achieve in different periods of our life.

IT IS TECH-ENABLED, BUT HUMAN-LED

Food and drink brands that can capitalise on the technologies used to profile consumers, and deliver guidance and health benefits.

IT INNOVATES ALTERNATIVES TO UNHEALTHY PRODUCTS

Brands that invest in R&D to solve for particular dietary problems and public health concerns will win.