[You Heard It Here First]

Four trends Mintel predicted would impact global consumer markets and how they are playing out today.

- Plant-based Food and Drink
- Digital Detox
- Active Beauty
- The Unfairer Sex

We all want to be ahead of the game. That's why some people follow tipsters and fortune tellers.

The smart ones work with Mintel.

We read markets, not palms. We spot the trends and identify the opportunities before anyone else. And we've been at the forefront of predicting the consumer trends that matter most, calling them early and accurately, for over 15 years.

Here, we take a look at four of the predictions we made and how they are playing out in today's consumer landscape.

Remember, you heard it here first.

[The Plant-based Revolution]

Marcia Mogelonsky

Marcia is a Director of Insight, Mintel Food & Drink. Her expertise focuses on a number of areas in the global confectionery and snacks sectors.

It may seem like the current interest in vegan and vegetarian diets has taken the world by storm, but it has actually been a very gradual journey. We've been predicting and tracking this trend for the past ten years, identifying signals of disruption from an early stage. Here, we take a trip down memory lane and track a timeline of the plant-based revolution, from its very beginning.

The move towards "going veg"

In 2010, a Mintel study of consumer attitudes towards natural and organic foods revealed that about a third of Americans who were exploring that burgeoning market were also interested in vegan foods. This did not mean that plant-based living was well established; less than 3% of American consumers followed a completely vegan or vegetarian diet that year. But Mintel sensed that there was something afoot, and in 2011, we noted that the percentage of "occasional" vegans and vegetarians stood at 7% in the US. And interest in non-dairy, especially soy-based beverages was on the rise.

It started with soy...

Still in 2010, Mintel predicted the growth of plant-based drinks as harbingers of the developing vegan and vegetarian trends in the US, led by the interest in soy milk. Back then, we saw the strong growth of private label plant-based milk alternatives as indicative of the potential for future growth in the category, pointing out that brands wishing to get involved in the then-new category of 'dairy milk alternatives' should be ready to ensure that they could compete with the lower-priced store brands.

While we were tracking the growth of store brand milk alternatives, we also noted a shift away from soy-based to nut-based beverages.

Noting the influx of challengers to soy, we observed that the plant-based beverage category was undergoing an evolution:

> High profile brands a nd healthy positioning have helped develop the almond milk category as a major competitors to soy milk in the US market, and non-dairy drinks other than soy are likely to develop steadily.

Mintel predicted the growth of plant-based drinks as harbingers of the developing vegan and vegetarian trends in the US, led by the interest in soy milk.

US brand Silk launched its first almond milk in 2010.

We continued to follow the trend from 2010 to 2015, when we noted:

> The rapid growth in on-dairy milk varieties reflected changes in consumers' eating habits, which have seen meat and dairy alternatives move from substitutions for the 'real thing' to products appreciated for their own unique flavors and nutritional benefits.

...And then came meat alternatives

Tracking the growth of plant-based alternatives has been the subject of considerable Mintel attention over the past decade. As we continued to see an increase in the number of consumers occasionally eating a vegetarian or vegan diet, we noted shifts in a number of food categories.

In 2015, writing about the increase in plant-based alternatives to meat, Mintel predicted:

> Plant-based protein is very likely the future option for consumers who are looking to eat healthier, live longer and better, and support more sustainable food production. Those companies who develop toward real-meat mouthfeel will have a better chance of converting consumers who don't find current meat alternatives appealing.

We continued to follow the growth of non-animal products across the range of traditionally animal-based categories from dairy to meat in a number of reports, published throughout 2015 and 2016.

Identifying the overarching trend

By the time we launched Mintel's 2016 Food and Drink Trends, the move to plant-based eating as a lifestyle was strong enough to give it a name of its own. Mintel Trend 'Alternatives Everywhere' concluded:

> Veggie burgers and non-dairy milks have escaped the realm of serving as substitutes primarily for people with dietary concerns, consumers with allergies and followers of vegetarian or vegan diets.

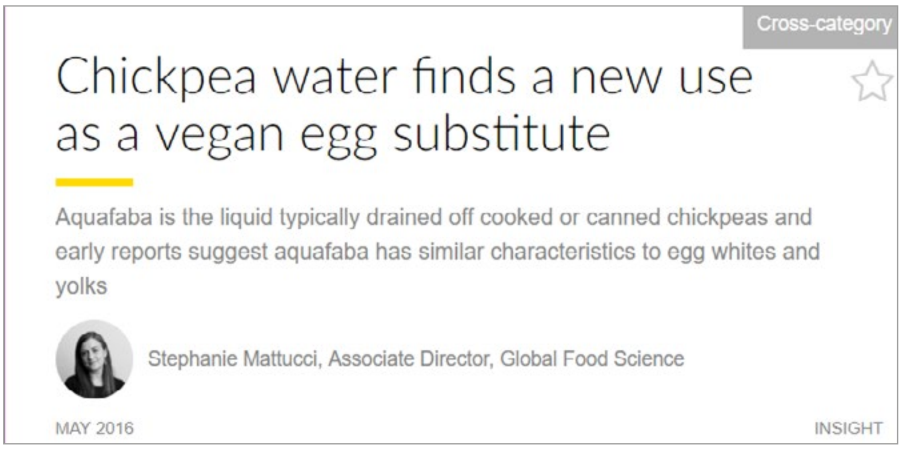
Launched in 2015, Dr. Oetker released a range of vegetarian frozen pizza in Germany, using wheat protein as meat alternative.

And we have been watching the trend towards alternative – or plant-based – proteins grow since then. We have seen the mainstreaming of meat alternatives, with the IPO of Beyond Meat and the addition of plant-based proteins to restaurant menus, the likes of McDonald's and KFC.

We have also seen the continuum in the evolution of non-dairy milk, ice cream and yogurt, shifting from soy to almond to oat, which is the trendiest new dairy alternative. Indeed, we first pointed to the potential for oat milk to compete with soy and other non-dairy milks in 2011, when we observed:

> Proliferation in other types of milk alternatives (eg oat milk, coconut milk, rich milk) provides variety for consumers who, for any reason, do not like cow's milk. Therefore, going forward, soy milk can expect stiff competition from the growing repertoire of nut and grain milk.

We have seen the emergence of plant-based products that would have been science fiction a few years ago, like mayonnaise made from upcycling the liquid that remains after cooking chickpeas, known as aquafaba. In fact, Mintel heralded the potential for aquafaba as early as 2016.


Cross-category

Chickpea water finds a new use as a vegan egg substitute

Aquafaba is the liquid typically drained off cooked or canned chickpeas and early reports suggest aquafaba has similar characteristics to egg whites and yolks

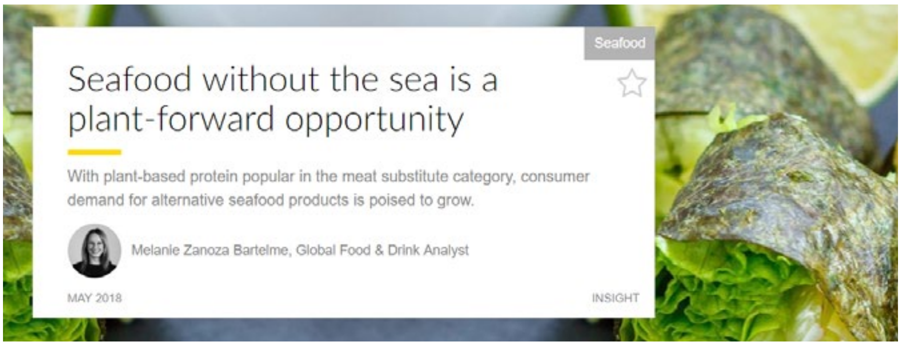
Stephanie Mattucci, Associate Director, Global Food Science

MAY 2016

INSIGHT

What’s next?

Mintel continues to monitor the global growth of vegetarian and vegan foodways and also to track the emergence of vegan options in categories that seem unexpected. The growth of vegan chocolate confectionery, for example, was identified by Mintel as early as 2016, while vegan “seafood” was identified in 2018.



Sophie’s Kitchen sells gourmet plant-based seafood

We are looking for ‘the next’ ingredient that can replace meat or dairy, and our quest is summarized in Mintel’s 2018 Food and Drink Trend ‘Science Fare’ which states:

> The rise in so-called ‘flexitarian’ diets has catapulted meat, poultry and seafood replacements into the spotlight. A new generation of scientifically engineered plant-based or laboratory-made meat, poultry and seafood is helping to expand options beyond traditional substitutes such as tofu, seitan and veggie burgers.

When tofu and seitan not only become mainstream products, but are already seen as ‘yesterday’s news’, it seems that the sky’s the limit for transformed, engineered and ‘sci-fi’-inspired alternatives to be the next headlines.

But at Mintel, we are also looking in the other direction: will meat and dairy make a comeback? In 2008, we introduced the idea of “ethicureans,” who eat meat, as long as it is sustainable, organic, local, and ethically raised. Keeping that in mind, we are watching the next evolutionary stage on two fronts, pondering whether meat and dairy consumption will have an ethical revival, or whether plant-based alternatives will continue to evolve and grow.

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[The Road To Digital Detox]

Richard Cope
Richard is a Senior Trends Consultant, bringing the latest consumer trends to Mintel's EMEA clients through bespoke presentations.

In 2010, with the publication of Mintel Trend 'Switch Off', we declared that technology has created an inescapable level of connectivity and exposure and, as a result, consumers need some time off, some privacy and the chance to reconnect with the real world.

Back then, those who espoused disconnecting for health or social reasons were often misconstrued as luddites, risking ridicule as Amish-style retro regressives ("them ones with the big sideys that don't use electricity" in the memorable words of Liam Gallagher).

Our assertions were driven by the University of Notre Dame's findings that obsessive "web-surfing" (note the terminology of the time) teens were 2.5 times more likely to be depressed, and media stories about hospital recovery programmes for Internet Addiction Disorder.

Nearly a decade ago, some 16% of UK consumers told us they wished that they "could just turn everything off and get some peace and quiet sometimes", whilst the Caribbean nation St. Vincent and the Grenadines re-positioned its appallingly scarce internet coverage as a positive, launching "digital detox holidays". Eight years ago, we boldly predicted a future where post (or direct mail) would become a prized, private, illicit alternative to digital messaging, where people would hire 'digital detectives' to hunt down data trails and close off their time into digital 'switch off Sabbath' periods.

Hands off: Learning to say "no"

Almost a decade later, internet access has penetrated both passenger aviation (with the availability of on-board wifi) and pre-adulthood: three in four US teens are thought to own an iPhone and 45% of US 13-17s told the Pew Research Center that they were connected "almost constantly" in 2018.

The best way to summarise the development of Mintel Trend 'Switch Off' is that, whilst it may have yielded few broadly-accepted lifestyle solutions, our prognosis that too much carefree connection should be limited has mainstreamed. Beyond the headline-grabbing figures for the 200+ people who have died taking selfies in the four years to 2018, is the growing sense that inescapable connectivity is contributing – at least in part alongside economic and urban pressures – to the woes of the 33% of UK 16-20s who "feel anxious or stressed" every day – twice the average, according to Mintel research.

Since the University of Notre Dame's study, the drivers of this trend have strengthened. The latest research to cement the link between youth depression and excessive social media usage is University College London's Millennium Cohort Study, published in January 2019. This follows 41% of US teens telling Hill Holiday that social media has made them "feel anxious, sad or depressed" and 57% of UK 16-25s saying to the Youth Index that they worry about their body image. We now inhabit the era of "comparisonitis" where 62% of all UK people feel inadequate when they compare their lives to others' online, according to Sanctus, and 1 in 50 are affected by body dysmorphic disorder (BDD), as reported by the International OCD Association.

Our declaration that people would seek to assert control has been borne out to a degree in the mainstreaming of device etiquette in "leisure-capsules" like restaurants, cinemas and trains, where device use is prohibited in certain areas, and by the 33% of British luxury holidaymakers actively reducing the time they spent using devices/technology during holidays.

Technology has created inescapable levels of connectivity and exposure and, as a result, consumers need some time off, some privacy and the chance to reconnect with the real world.

We have not quite reached an era of 'data detectives' – beyond journalistic investigations of the Cambridge Analytica scandal – but the very public tribulations of Facebook have introduced an unexpected additional factor in people's reconsideration of how best to use their time: hours spent on the site by adults fell significantly in 2018, compared to 2016. In this regard, one of the biggest successes of the Switch Off trend in raising awareness of digital dependency has been the reaction of the tech giants in preaching a message of 'quality not quantity' when it comes to offering time usage stats and limits on usage of their services.

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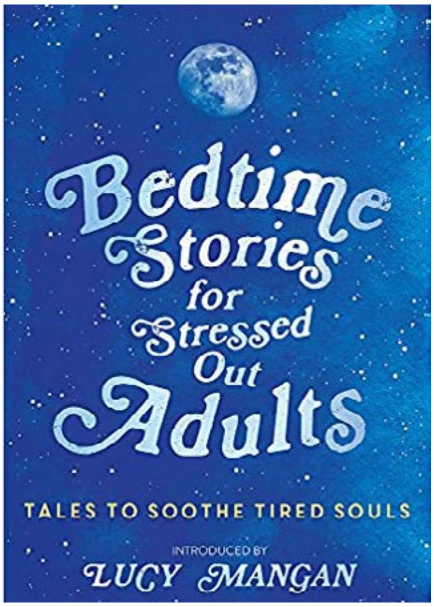
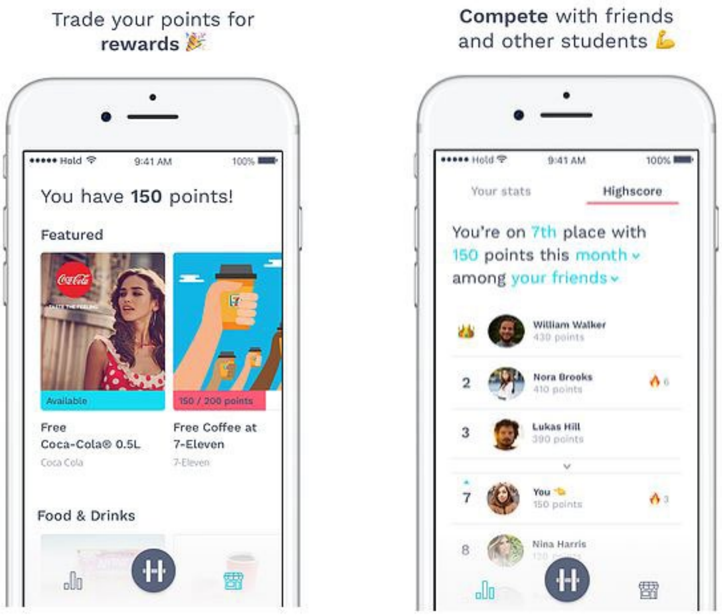
In leisure, we've seen analogue disconnection marketed as profoundly aspirational, therapeutic and even sexually charged in the form of adult summer camps like California's Camp Grounded commanding "Disconnect to Reconnect" and Oregon's Beloved, promising "deep eye contact with strangers". But a healthy return to childhood innocence remains another constant theme, embodied most recently in the pages of Lucy Mangan's "Bedtime Stories for Stressed Out Adults", offering 'tales to soothe tired souls'.



Source: Amazon.co.uk

However, from a consumer perspective, the trend was never going to succeed on puritanical grounds, where it is deemed to be some kind of vice to be denied. Instead it has evolved into a means of maximising one's enjoyment and efficiency. Recent examples of this approach include Stella Artois's 'Les Pockets' TV campaign urging drinkers to put their phones away and embrace what's in front of them instead; Denmark's Hold app, which tracks smartphone usage and gives students points redeemable at cafes, cinemas and Amazon as a reward for them not touching their phone and focusing instead on study; and HSBC Argentina's 'Modo Mesa' campaign offering diners discounts for doing the same.



Source: Hold app

The future is in control

Health is going to be a key driver in how switching off evolves in the future, and this will encompass everything from reacting to sleep deprivation (a problem for 57% more US teens in 2015 than in 1991, according to Monitoring the Future) to sedentary lifestyles and responding to the youth obesity time bomb.

What's fascinating is how the youngest consumers are at the vanguard of a movement to achieve more control, learning from the mistakes – or abuse – of parents and older siblings. There is a strong analogy here with how they have rejected the habitual over-consumption of alcohol by their elders: witness the deliciously astute disgruntlement of the three-in-ten children who complained to the Norwegian Media Authority in 2016 that their parents spent "too much time on their smartphones and social media sites".

This generation is already learning from the 'sins of the fathers' – or at least their older brothers and sisters – when it comes to over-connection: 17% of US millennials made "aiming to reduce their screen time" as one of their top five priorities for 2018, according to Mintel research, whilst more than half off US 18-23s tell Mintel "I am trying to reduce the time I spend on social media"- considerably ahead of the average of 44%.

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Using technology to switch off

We can expect more software solutions to help us achieve control, like those espoused by Dan Ariely, Professor of Psychology and Behavioural Economics at Duke University. He has already argued that focus and productivity would be raised – and stress lowered – if notifications were batched and sent when our mouse and keyboard usage shows that we are not in an active state of "flow", namely working and thinking.

Another development will be that, as more of us look to switch off, apps and sites will have to raise their game beyond mere 'diversion' if they are to win our attention and our screen time. Consider how just 48% of US 18-23s "feel mentally stimulated" every day according to Mintel, yet 57% of the same cohort tells us "I have used online services to find local sports, activities, or interest groups to join". The simple conclusion is that we need to see more great initiatives like Red Bull Brazil's 'Find Your Band' platform, which digitally hooks up potential musical partners for inspirational, real-world, face-to-face activity.

This is how 'Switch Off' will likely evolve: the lines between 'on' and 'off' are already irrevocably blurred, but aimless, incessant, uncontrolled activities will die away. It is those quantified, rewarded, beneficial, analytical activities that will grow – the ones which can claim to match a much broader definition of what it means to be 'connected'.

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[Active Beauty Gets A Workout]

Vivienne Rudd
Vivienne is a Director of Innovation & Insight, Mintel BPC. She is responsible for creating and delivering trend presentations and insights to clients around the world.

Since we unveiled the Active Beauty trend at the end of 2016, it has gone from strength to strength.

On your marks

In mid-2015, an intriguing story came out of Japan. Women had taken up running in great numbers and wanted to look their best for mid-race selfies. So they were swapping tips about which make-up products would stay in place throughout the race. Chacott, a long standing brand of apparel and cosmetics for dancers, received lots of mentions – and saw its sales soar as a result.

That caught the attention of Mintel's beauty team as it resonated with the booming athleisure clothing trend, the emergence of facial fitness brands Face Gym and Face Love Fitness, and some early warning signals from the make-up and skincare categories. We watched carefully, gathering more examples and more ideas for future new product development, and at the end of 2016 we launched the Active Beauty trend.

Active Beauty looks at the beauty industry's efforts to help consumers get the most out of their fitness routines, with products that help them before, during and after exercise.These may be as simple as sweat-resistant formulations or as complex as sportswear that monitors and responds to muscle and skin changes. The trend also forecast the entry of fitness chains into the beauty space and the development of beauty fitness communities, inspired by the likes of Cross Training.

The Active Beauty trend immediately resonated with clients and the press alike. We have continued to develop the trend, and have been delighted to see many of our predictions transform from blue sky thinking into commercial reality.

Get set

Today's Active Beauty products are, for the most part, colour cosmetics and facial skincare products designed to keep the face looking fresh and even-toned, no matter how hard the workout. These operate at a number of different price points, from mass market e.l.f. to premium brands Clinique and Dior.

A number of brands have moved on from preventing heat and moisture-related discomfort to products activated by heat and moisture, just as we forecast. In fact, when we asked European consumers if they would be interested in such products, the answer was an enthusiastic yes.

Sweatwellth has an entire collection of bodycare and body wash products featuring encapsulated actives which are released over time when triggered by sweat, heat or motion. These actives are selected to protect, help repair, refresh, cool and replenish essential electrolytes. The collection includes two anti-chafe products: Awesome Chalk to improve grip and prevent chafing and blisters, and Friction-Free to cool and repair damage caused by chafing.

A number of brands have moved on from preventing heat and moisture-related discomfort to products activated by heat and moisture, just as we forecast.

Source: @sweatwellth

Source: FaceGym

Face Gym launched its own reactive products in March 2019. The company has gradually transformed itself from a salon and retailer of third party brands to an Active Beauty brand in its own right. Founder Inge says it's the first skincare range triggered by exercise. "As a mother of two under age four, I have a small window of time to dedicate to myself. I didn't want to sacrifice a facial for a workout or vice versa, so I created something which targeted both at once."

This is confirmation that Active Beauty has moved far beyond simply using the language of fitness to sell products. Sportsmen are now getting involved with developing (and funding) Active Beauty brands.

Retired basketball star Kobe Bryant is co-founder of Art of Sport, a bodycare brand focused on the needs of athletes. The body wash, shampoo, sunscreen, deodorant and recovery cream are formulated to protect athletes, help them perform and aid their recovery. The products were developed by scientists with input and backing from professional stars like NBA's James Harden, NFL's Juju Smith-Schuster and surfer Sage Erikson.

Source: @goartofsport

Go!

When we first launched Active Beauty, we suggested that brands could build on the community spirit of CrossFit and Peloton. Excitingly, this is exactly what Face Gym has lined up for its next venture. Face Gym plans to launch an app in 2020, which will offer Peloton-style live workouts for its followers. In-store events will also build on this sense of competitive collaboration. We've already seen companies like Philosophy and Lush run in-store fitness events, and given that 38% of UK consumers would be interested in attending a similar event in the future, we will see more similar fixtures in the coming years.

We're also seeing movement towards another of our forecasts – heat-activated fitness apparel. Devan Chemicals has collaborated with Kaneka Corp to develop textiles designed to aid sports recovery and skin protection by reinforcing the body's antioxidants with Q10, sea kelp and thyme oil.

And what about our other prediction – DNA-driven Active Beauty, which helps consumers meet or surpass their genetic fitness profile? We've already seen home DNA testing kits go mainstream thanks to genealogy specialists Ancestry and 23andMe. This will help drive acceptance of products such as DNAFit's Diet Fitness 360 which generates recommendations for personalised supplements based on fitness profiles. Personalised bodycare products must surely be the next step?

[Examining The Unfairer Sex]

Joyce Lam
Joyce is a Senior Trends Analyst at Mintel, focusing on capturing consumer behaviour for the Asia Pacific market, as well as supporting the global Mintel Trends team to identify new consumer trends.

Gender inequality still remains an issue despite major efforts and improvements. Even in China, where gender equality rights are enshrined in the constitution and women are supposed to 'hold up half the sky', the country's gender gap score ranked 100th out of 144 countries in 2017, according to the Global Gender Gap report by the World Economic Forum.

In Asia Pacific, women face gender stereotyping, discrimination, or even worse, harassment at home, the workplace and beyond. We announced the Mintel Trend 'The Unfairer Sex' back in 2012, highlighting how brands and consumers are challenging existing gender gaps to strive for equal rights, treatment and opportunities between men and women. Today, this has become a hot topic that is being discussed more than ever before.In the past couple of decades, a rising number of women in Asia Pacific have been able to enjoy better education and achieve financial independence, giving them more freedom to make their own life choices. While these improvements may sound like a positive change, women feel more overstretched than ever before; they are in a continuous battle between pursuing career opportunities, while managing the traditional social pressure of getting married and starting a family.

When it comes to household chores, Mintel research reveals that as many as four in five Chinese women are still taking more responsibility than men, three in five when it comes to cleaning duties, despite more men helping out compared to three years ago.

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Brands stepping up to challenge the status quo

Brands and companies have been encouraging female consumers to do things that used to be labelled as 'for men only'. Nike's global 'Dream Crazier' campaign, which inspires women to challenge the status quo, has also been adapted locally in Asia. In Hong Kong, for example, the campaign featured five female athletes on building-tall billboards, calling on women to live their lives on their own terms.

An annual campaign since its launch in 2016 is cosmetics brand SK-II's #ChangeDestiny initiative. It questions the traditional perceptions of marriage in modern day China, highlighting the struggle that Asian women have finding a balance between their own life choices and family expectations.

Over in South Korea, we see the rising popularity of the #escapethecorset movement where South Korean women are destroying makeup products in protest at the country's unrealistic beauty standards.

Source: brandinginasia.com

Source: SK-II YouTube

The risk of stereotyping women (and men)

Brands that make the mistake of stereotyping gender roles may face a backlash.Giordano’s ad in Hong Kong, which featured a woman wearing a T-shirt saying ‘cook’, sparked outrage on social media. Other brands faced similar accusations for being insensitive towards women in their marketing activities: an IKEA ad showed a mother scolding her daughter for not bringing a boyfriend home; and Audi compared women to used cars in an attempt to promote its second-hand platform.

Brands should be prepared to adapt their products and services to the changing values and lifestyles of women, especially since their economic strength will prove too formidable to ignore. Mintel research on marketing to singles in China shows that over a third of single women think marriage isn’t necessary. This significant shift in values also indicates there is room for more diversity and inclusivity, in life and in the workplace.

Employing gender-positive internal company policies are a way to identify a brand’s genuine value. Creating female-friendly working environments, including equal pay across genders, flexible working hours for parents, and having a clear career trajectory for female workers—which is not impacted by maternity leave—are often the first things that brands can do to show their support for gender issues. For instance, brands can take inspiration from Adobe India, which closed the wage gap between its male and female employees.

Despite major efforts, social attitudes usually take a long time to change, and the gender gap is no exception. In Asia Pacific, the discussion continues about creating a safer environment for women, both physically and mentally, to enable them to make their own life decisions, be it career, family, or hobbies.

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Source: scmp.com

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