



# Health & wellbeing



“I want to achieve a holistic approach to physical health and emotional wellbeing”



## Trend overview



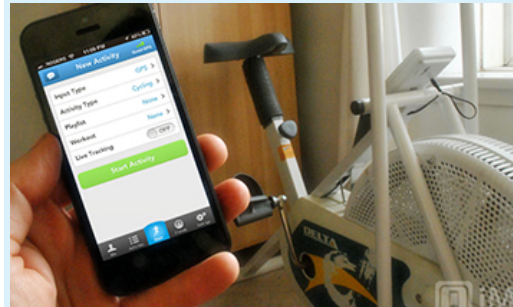
To deal with their maxed-out lives, today's consumer has fully embraced a more holistic approach to looking after their well-being, which increasingly focuses on mind as well as body. People are embracing both science and nature to create sophisticated and tailored lifestyle plans.

Paying attention to all facets of health has become a symbol of status. With this mind-set comes a growing desire to plan, track and measure different aspects of one's health, and an appetite for smart health management tools. Meanwhile, achieving balance amid busy lives is creeping higher on the consumer agenda; the desire to take care of mental and emotional wellbeing is growing, as well as interest in tools and solutions that help the consumer find the 'headspace' they are looking for.

Food and drink remain key health and wellness strategies. Consumers continue to watch out for 'nasties' and scrutinise what goes into their mouths; 'natural' is an ever more important shortcut for 'good for me'. On the other hand, people are becoming more aware of how the social context in which they eat and drink contributes to holistic wellbeing. Brands that can celebrate social meaning around food have an opportunity to build a real emotional connection with consumers.



Healthy living is as much about stripping away the artificial and unnecessary as it is about adding more 'good stuff'. Pure and natural products are the order of the day.



Consumers are making use of technologies that manage and measure many aspects of their lifestyle, from water intake, to sleeping, to sugar levels. Knowledge is power when it comes to ensuring you are living in the healthiest way you can be.



Achieving balance is increasingly top of consumers' agendas; boundaries between emotional and physical wellbeing blur as people aspire to a holistic ideal of healthy mind and body.





## Proactive prevention

Proactively defending the body against future disease and illness

## Essential purity

Desire for raw, natural and clean

## Creating headspace

Desire to take care of your mental & emotional wellbeing

## Tribal wellbeing

Increasingly choosing collective physical & wellbeing activities

## Managing tempo

Seeking solutions to suit varying energy needs & optimise wellbeing throughout the day

## Personal solutions

Desire for personalised health solutions & measurement tools (tech-enabled or otherwise)

## Good start

Ensuring children get the best start in life





## Proactive prevention

With the increased blurring between the food & drink category and pharmaceuticals, consumers are increasingly active in their search for products that contain added health benefits. Products that promise positive, long-term effects and protection from threats to health are particularly desirable.



## From

A desire for routine and targeted solutions, with tangible benefits



Australian FibreBoost is a breakfast sprinkle – an analogue and easy way to add preventative health measures to your day.

## To

More sophisticated and personalised health measures that are woven into exciting products and services



In the US, Heartbeet's range of breakfast-replacement drinks combat different lifestyle diseases with their fresh, and often exotic, ingredients.



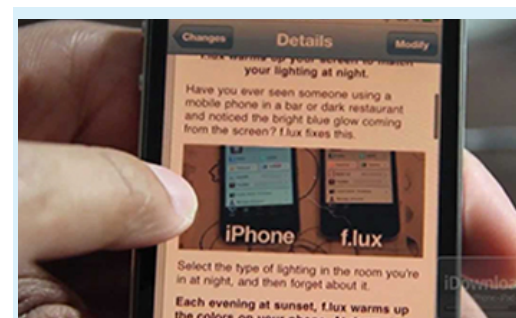
**What:** Yakult has long established itself as one of the most popular drinkable probiotic yogurts in the world, but the Japanese company continues to grow by an average of 6% annually due to effective and constantly adapting marketing strategy.

**Why:** In each bottle are 6.5 billion cells of the unique strain of bacteria scientifically proven to aid digestion and immunity, and the company capitalise on the certified scientific appeal of the daily drink as they expand into Brazil and Mexico. They are now planning new routes to consumer, entering convenience stores and increasing the brand's online presence.



**What:** New desk stand design, by South African designer Ryan Roberts.

**Why:** Given the current global 'standing meeting' trend that sees employees and colleagues stand at a meeting instead of sit, this innovative product is a much-needed solution, aiming to strengthen back and leg muscles, decrease headaches, burn calories and cut working time shorter due to the posture required to do tasks.



**What:** f.lux is an American brand new software that controls your phone and computer screens.

**Why:** Computer screens are designed to emit a certain kind of light, similar to that of the sun, so as soon as screens are being used at night-time, however, looking at this kind of light plays havoc with eyes and body-clocks. F.lux fixes this, making the colour of your computer's display, protecting your eyes, and helping you sleep.





## Essential purity

People are increasingly embracing the concept of purity to guide their nutritional and lifestyle choices, rediscovering simple, clean, wholesome components and processes that give energy to the body and balance the mind.



## From

Harnessing the health benefits of specific natural ingredients, and prioritising lower processing



UK Nakd bars do away with processing, promising only raw-pressed, natural ingredients.

## To

A more holistic understanding of the benefits of simple food preparation processes and components



More 'Raw' cookbooks and food blogs have become a hit in Britain, helping people create dishes that they had not considered, or could not access before.



**What:** Consumers in Shanghai are using beauty products from Innisfree, a company that mixes ingredients from the Korean island of Jeju.

**Why:** Innisfree draws on the public perception of Jeju as a pure, unpolluted island haven. Ingredients include volcanic ash, natural spring water and local plant extracts, which, to consumers plagued by hygiene scandals across several industries, is an attractive alternative to beauty products made domestically.



**What:** 'Banting', a diet promoted by the Real Meal Revolution, has taken South Africa by storm. The world's first Banting restaurant has just been opened there.

**Why:** The idea of Banting is to return to man's purest dietary needs – high levels of protein and low amounts of hard-to-digest grains. Processed food is out of the equation, simplicity is key.



**What:** Australian brand Jax coco is a 100% coconut water with no added sugars or preservatives

**Why:** In a soft drinks market full of unsubstantiated claims of naturalness and purity, Jax's simple supply chain and even simpler ingredients list (just micro filtered coconut water) holds a great appeal.





## Creating headspace

‘Headspace’ has become a precious resource, as people seek to de-clutter their overworked minds. This sub-trend has evolved from a broad search for mental balance, to a more targeted search for mental downtime. There is growing appetite for user-friendly solutions that help manage mood and facilitate headspace.





## From

Sophisticated solutions that meet different moods or emotional states at different times, and help achieve balance



UK's Pukka tea's 'Sleeptime' blend is an infusion inspired by homeopathy to slow down the body and prepare it for sleep.

## To

Helping consumers find and experience mental downtime



The bestselling and globally available 'Headspace' app proclaims the health benefits of finding 10 minutes of down time in the midst of a busy day.



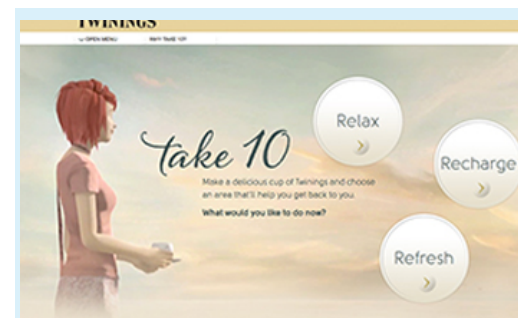
**What:** Sprig is a San Francisco-based food delivery and meal-planning app for those who don't have the time or headspace to seek out and cook the optimal dinner ingredients.

**Why:** Sprig's menu doesn't rely on salt, fat, sugar or MSG – in 20 minutes hot, ready-to-eat meals are delivered to your door. Recyclable packaging, organic produce, and meals planned for the week; Sprig sells itself as a wellbeing solution that buys you time and offers total peace of mind.



**What:** LOLĚ is a French brand of activewear that runs yoga events throughout the US and Europe attracting thousands of participants.

**Why:** LOLĚ does not just want to promote the clothing line, but rather a lifestyle dedicated to peace and well-being. LOLĚ is offering free 'mass yoga' masterclasses with professional instructors and a live orchestra, for an hour of pure headspace amongst hundreds or thousands of like-minded individuals.



**What:** One of Twinings' latest campaigns features a new slogan: 'Gets you back to you'.

**Why:** This British tea brand has identified what is no longer just a consumer desire, but has become a consumer need: to take time to one's self in order to relieve stress and create headspace in the midst of a hectic day.





## Tribal wellbeing

Consumers have begun to define themselves by the collective wellbeing activities they participate in, whether physically or by becoming part of online communities.



# How is this sub-trend evolving?



**From**

Individual motivation to reach personal health goals, even if part of a group



American MyFitnessPal diet tracker, into which you input food and drink and personal goals are generated.

**To**

Collective health-focused endeavours that give a greater sense of purpose



Yoga and Brunch Club (YBC) in London offers a group programme for a series of restorative yoga sessions followed by a vegan brunch.

# In-market examples from around the world



**What:** There has been an explosion of global yoga festivals and American Wanderlust, modelled after epic, days-long rock festivals, has been leading the way.

**Why:** Through the discovery of food, wine, craft-making, adventure activities, dancing, and, of course, yoga practice, connections are born in the fun. Beginners, yogis and even families attend classes with famed yoga teachers for a mindful, celebratory and communal experience.



**What:** Nordic Military Training is a club and network that runs boot camps and is rapidly expanding with new members all over Sweden.

**Why:** NMT members join because it brings people together. The sense of fellowship and connection is most appealing. Strangers help each other and form teams out in nature, which brings a strong sense of achievement and communal spirit.



**What:** Run an Empire is a new UK fitness-based game that challenges its players to take over their local area by jogging. Players can also see areas that others have taken and capture for themselves by walking, jogging or running through it.

**Why:** While fitness games are often targeted as a single-player experience, Run an Empire takes inspiration from ever-rising popularity of running clubs and digital fitness communities. It is encouraging friends, total strangers and even families to get fit and enjoy being part of a wider running community.





## Managing the tempo

Whether a pick-me-up or a wind-me-down, interest in food and drink solutions to optimise wellbeing by managing energy levels throughout the day continues to grow.



## From

Energy solutions that feel natural, not synthetic



Using American 'Real Fruit Energy' as opposed to caffeine, Super! Natural energy drinks appeal to the more health-conscious

## To

Sophisticated and exciting energy management through understanding food and drink combinations



Australian app 'Medibank' is just one of a new wave of several energy-tracking apps that measure food input and energy output

# In-market examples from around the world



**What:** Nootropics, otherwise known as "smart drugs," are all the rage in Silicon Valley, and Nootrobox is at the forefront of this energy-managing trend.

**Why:** Nootrobox helps consumers find their focus with "nutrients for their brain". They help people have a more productive day by accelerating the mind when it comes to tasks related to memory, focus, and attention.



**What:** Wakeup is a new Israeli drink specially formulated to give people a boost in the natural post-lunch dip.

It is based on all natural ingredients and scientifically validated as far superior to caffeine for sustaining energy.

**Why:** Wakeup comes from a growing need for naturally-based products that meet specific energy needs across the day.



**What:** 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.

**Why:** The inhalable formulation of AeroShot means the boost can be felt almost immediately and is one of the reasons of its growing popularity in the US.



## Personal solutions

Moving beyond personalised diets, there is a growing consumer desire for a personalised wellbeing plans that tackle the range of modern day health issues. These are increasingly based on accurate, tech-enabled measurement.





## From

**Personalised diets  
based on allergies and  
intolerances**



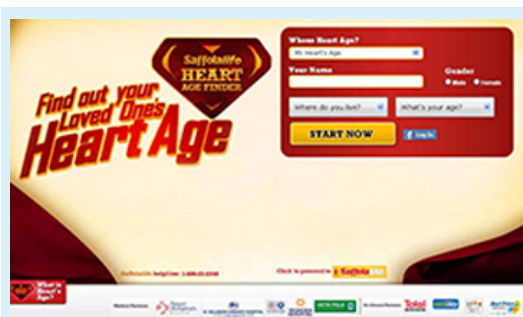
UK Food supplier Bidvest 3663 recently launched a 'gluten-free made simple' guide

## To

**Holistic, personalised  
and often tech-enabled  
plans**



Dynamic running therapy courses are growing in popularity in London, as counselees find exercise stimulates openness as well as happiness-inducing endorphins – taking care of physical and emotional wellbeing in one go.



**What:** The Saffrolife website in India lets users perform an instant health and fitness assessment, then download diet and exercise plans that will work for their body type and fitness level, to provide clear advice for gradual improvement.

**Why:** Creating a simple online toolkit that assesses dietary needs, and then offers easy diet and exercise recommendations seems essential product for a today's health conscious consumer.



**What:** Máquina is a Brazilian fitband that tracks people's movement and sleep patterns and then suggest healthier practices. The gadget is, somewhat surprisingly, produced by a juice company.

**Why:** Following small tailored daily changes like walking a little further, not using the elevator and controlling the food intake can dramatically change people's health and wellbeing and produce relatively swift results.



**What:** Athos is an American high-tech fitness outfit that is looking to infuse the capability of wearables into the actual fabric of the apparel. The sensors, which utilize electromyography, record and measure muscle movement and sync the results with a smartphone app.

**Why:** By giving users the real-time information and feedback they need, Athos apparel offers a valuable tool for achieving fitness goals. The company tagline, "upgrade your gear, upgrade yourself", demonstrates the brands' ultimate purpose: letting consumers fine-tune their workouts so they can maximize efficiency and avoid injury.



## Good start

Consumers are ever more focused on what constitutes good nutrition for their children – particularly in the light of recent food and drink scandals. Beyond simply feeding their children healthily, adults desire greater education in food and healthy cooking, to ensure good habits continue into later life. Technology can increasingly play a role here.



## From

Introducing kids to more sophisticated tastes and food education from a young age



New York-based 'Petite palate' have a range of organic sweet and savoury baby food with ingredients ranging from figs and pistachios to spinach and lentils .

## To

Simple ways (often tech-enabled) to get kids involved in sourcing healthy food and cooking



Great British Chefs launched their 'Cooking with Kids' app – a child-friendly way to proactively educate on food, health and the kitchen.





**What:** Healthy Irish snack brand Veronica's has launched Crunchy Creatures - gluten-free, 100% baked corn crisps, with 40% less fat than a standard pack of crisps.

**Why:** Saving parents from the bullish banning of junk snacks, Crunchy Creatures is a healthy and tasty version of crisps for kids, with a cheesy flavour, as opposed to the more sophisticated flavour combinations of other baked crisp brands.



**What :** Pytt I Panna packs in Sweden provide a simple and healthy snack solution that children can make themselves when they come home from school.

**Why:** The product has visual cues that are easy and engaging enough for children to follow, so they learn about nutritious cooking and gain practical experience.



**What:** US company Skoop LLC makes nutrient-packed food powders and supports children's health and wellbeing.

**Why:** The company's key value is that everyone, everywhere deserves access to the very best nutrition available. So, they've partnered with a non-profit to provide one serving of free fruits and veggies to a public school lunch programme in America for every serving of Skoop they sell.



# How is the trend playing out in Ireland/Great Britain?



## Relevance in Ireland

In Ireland, consumers are keenly embracing technology as a way to improve their health; the *Deliciously Ella* vegan and gluten-free cooking app was the 3<sup>rd</sup> most downloaded this year, while *Couch Potato to 5k* fitness training was 5<sup>th</sup>.

Consumers are more inclined to feel stressed than they have been in recent years, although rekindled Irish optimism has brought about communal ways to achieve balance day-to-day.

## Relevance in GB

In Great Britain, lifestyle gurus are expounding the virtues of various 'free-from' diets, for consumers desiring purer eating and overall lifestyle. The gluten-free market saw the highest number of new product launches of any food category in 2014.

Busy lives means busy heads, and greater emphasis is being placed on mental and emotional health in the hectic life of a British consumer. Now 1 out of 5 adults in the UK regularly do yoga or tai chi to improve their wellbeing.



# How dynamic are each of the sub-trends?



Heating up  
Still warm  
Cooling



Managing the tempo

Creating headspace

Tribal wellbeing

Heating up  
Still warm  
Cooling



Proactive prevention

Personal solutions

Good start

Essential purity

# Thought-starters: How could you..?



**Leverage technology to help consumers make the most of your product, and understand its health and energy benefits for adults and children alike?**



**Pare back ingredients, processes or packaging to emphasise the naturalness of your product?**



**Make your product customisable, and suitable for a variety of diets and lifestyles? How can it contribute to a holistically balanced lifestyle?**



# Thank you



For more information on how to use these  
Consumer Lifestyle Trends contact the Bord Bia  
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