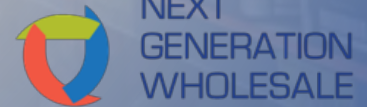


# PREDICTING THE CONSUMER GROUPS OF THE 2020S

JILL LIVESEY  
MANAGING DIRECTOR  
HIM & MCA



# How good are we at PREDICTING CONSUMER GROUPS?



Demogs



'90's



'00's



'10's

Today



# CONSUMER GROUPS OF THE 2020S

**Planet  
Prioritisers**

**Habitually  
healthy**

**Creatures of  
Convenience**

**Experiential  
Engagers**

**Premium  
Pursuers**



**NEXT  
GENERATION  
WHOLESALE**

# SHOPPERS and schoolchildren TURNING ACTIVISTS

Planet Prioritisers

**81%** Important

**70%** Trying to reduce

**67%** Confused

Feb 19 – Climate change strikes



# BRANDS AND RETAILERS expected to DO MORE

**34%** of  
convenience shoppers  
say brands/retailers are  
not doing enough

**10%**  
Higher value baskets

## Thornton's Budgens introduces innovative plastic-free zones

By Christian Fuller | 8 November 2018



Brighton restaurant

Waitrose trial



# HIP TO BE HEALTH

Habitually healthy



**87%**

Healthy food of high & moderate importance



**35%**

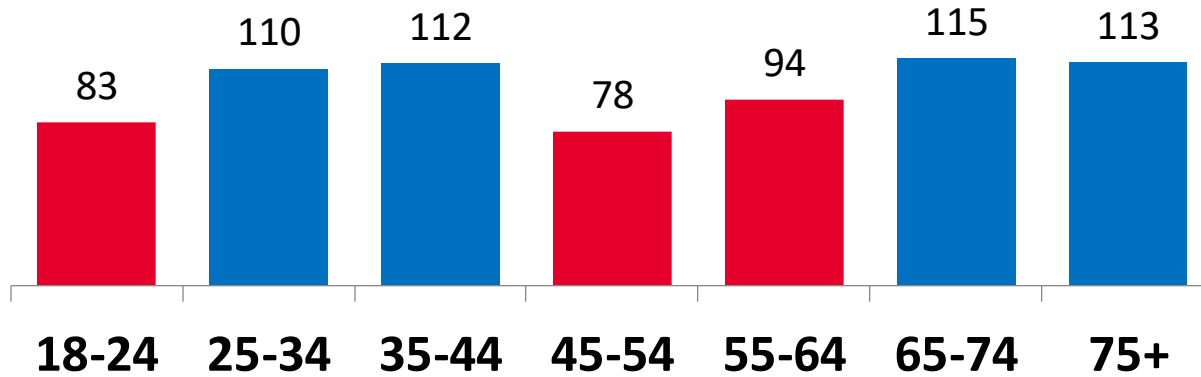
doing more to eat healthy over last 12 months

# NOT JUST A MILLENIAL THING

Habitually healthy

# 37%

Aging



1. Getting Older

50%

2. Losing weight

42%

30%



# Veggie trend for young, low sugar for rest

Habitually healthy

18-24

25-34

35-44

45-54

55-64

65-74

75+

Vegetarian

Low sugar

Low sugar

**15%**

of total adults



**18-34s**

16% Vegetarian

7% Vegan

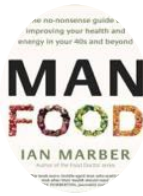
The no 1 expected dietary change  
“Eating more veg”



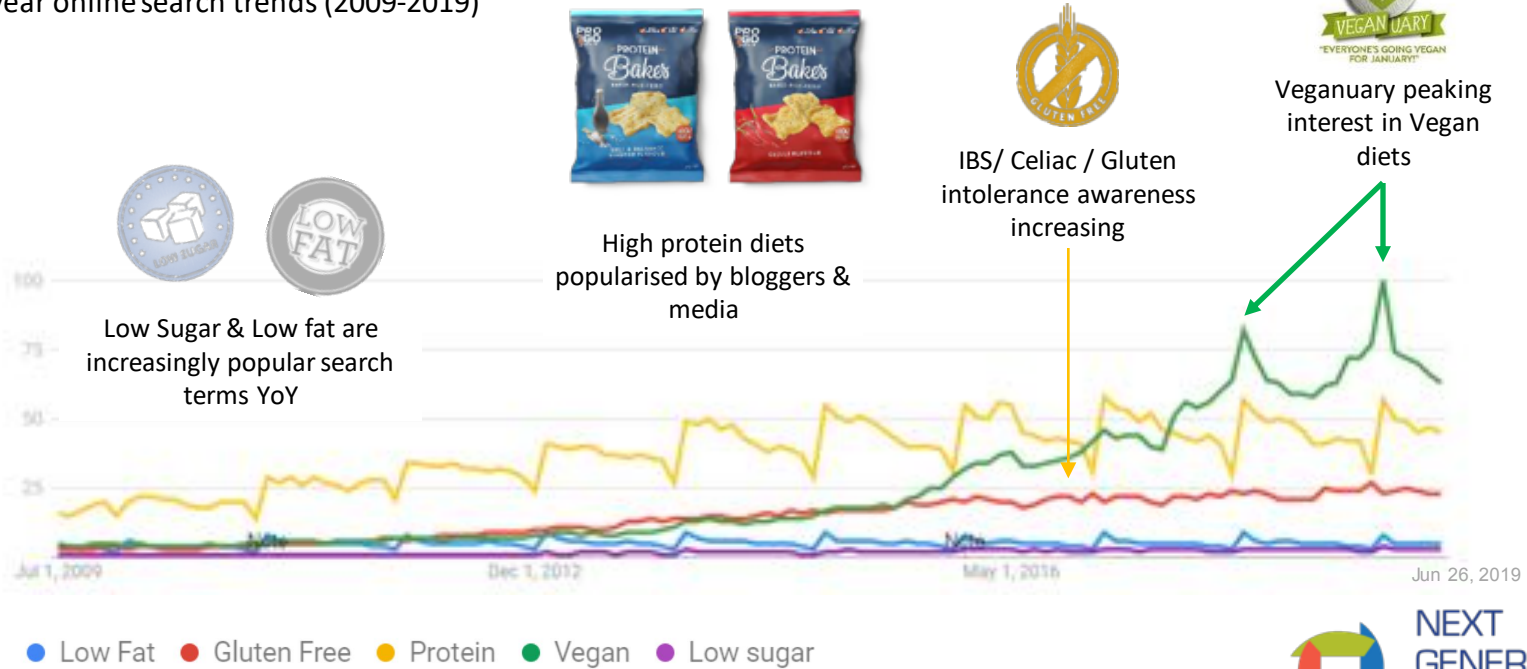


# Increasing interest in specific diets

Habitually healthy



10 year online search trends (2009-2019)



Source: Google Trends

# I'M SO BUSY

Creatures of  
Convenience

**32.7m** in employment

**42 hours** longest work week

**48 hour** commutes but 2 hour  
commutes are on the increase

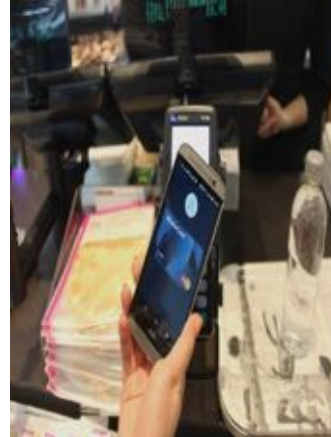


NEXT  
GENERATION  
WHOLESALE

# NO CASH CARDS ONLY

Creatures of  
Convenience

Convenience  
stores  
Cashless



Food to go  
chains  
cashless

# FOOD TO GO

Creatures of  
Convenience

**£21.2bn**

**148,992** outlets in the UK

**+12,721** new outlets in 5 years



# SHAMED FOR GETTING IT WRONG

Experiential  
Engagers

# 64%

Hesitate to purchase a  
bad online review

## Wahaca tightens up walk-outs policy

17 June 2019

Hi @wahaca just eaten in your Kentish Town restaurant for the last time.

Ppl next to us left without paying and their server is made to foot the bill from his wages. Apparently company policy. Utterly shameful employment practice.

Food's great, company is crap.

@thomasinamiers

9:23 pm - 15 Jun 2019 From Camden Town, London

3,419 Retweets 8,570 Likes



NEXT  
GENERATION  
WHOLESALE

Convenience stores, face to face  
interaction remains at the heart of our offer

## **No 1**

**driver of store choice**  
**Friendly and helpful staff**

**Grew in importance YOY**  
**+2pp**



# SPECIALISATION DRIVES HIGHER TRUST

Premium Pursuers



Sainsbury's  
concept store, Sellyoak



Tesco to launch  
"Finest" c-stores



Raw store, Shoreditch

# PREMIUMISATION DRIVING FOOTFALL

Premium Pursuers

## 42%

18- 24's Drinking more  
premium drinks



## 26%

18- 34's Drinking more  
Craft beer



## MCA.

Pub market growth outperforming  
the eating out market 1.9% to £23bn  
in 2019

Driven by quality, experience and  
localisation as consumers reappraise  
pub appeal



NEXT  
GENERATION  
WHOLESALE



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# THANK YOU!

**JILL LIVESEY**  
**MANAGING DIRECTOR**  
**HIM & MCA**



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