PREDICTING THE CONSUMER GROUPS OF THE 2020S

JILL LIVESEY Managing Director Him & MCA





How good are we at PREDICTING CONSUMER GROUPS?



CONSUMER GROUPS OF THE 2020S

Planet Prioritisers Habitually healthy

Creatures of Convenience Experiential Engagers

Premium Pursuers



SHOPPERS and schoolchildren TURNING ACTIVISTS

81% Important

70% Trying to reduce

67% Confused

Feb 19 – Climate change strikes



Planet Prioritisers

13 Hugh's War on Waste Retweeted

Hugh Fearnley-Whittingstall @ @HughFW - 22 Nov 2018 Rail Gournet on @SW, Bailway just refused to make me a cup of tea in my keep cup - saying it's company policy to use the cups provided. I've asked on many other trains (no: Greak Western and Cross County) and this is the first time I've been refused. State WasterNot #WasterNot #WasterNot#WasterNot#WasterNot #WasterNot #WasterNo



Hugh Feamley-Whittingstall © HughtW - Jun 17 Is @sambury, thanks for letting us know. We'd love to know how long this indiction is advised to last? Jack

reduction is going to last? And if you watch the last two shows, you'll see that you could be much bolder, and give us a lot less plastic when (if) we shop with you... #WarDxPlastic @bhandaarwi

Sainsbury's Costinations

Hi @HughFW, later this week we will reduce prices for several loose truit and veg items, meaning that the majority of our loose huit and veg will be cheaper than the comparable packaged product. We will certinue to look at where we can make further reductions.#Wa/DnPlastic _____

0 19 12 19 0 666 19



Planet Prioritisers

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



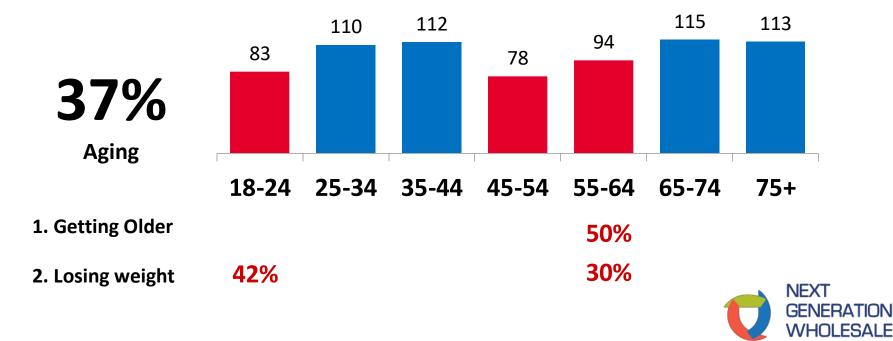
35%

doing more to eat healthy over last 12 months



NOT JUST A MILLENIAL THING

Habitually healthy



Veggie trend for young, low sugar for rest

Habitually healthy

18-24 25-34 35-44 45-54 55-64 65-74 75+

Low sugar

15% of total adults

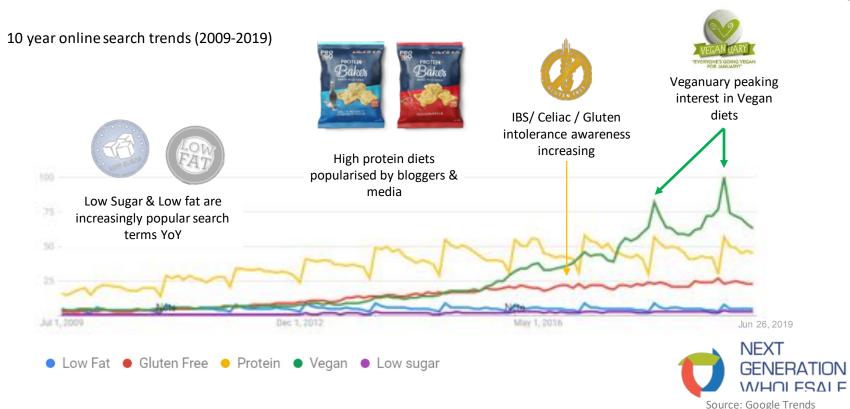


Increasing interest in specific diets

Habitually healthy

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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





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 🛛 🛞 🚱 🖸 🍈 🔕 🏤 🌚 🕤 👄



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





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SPECIALISATION DRIVES HIGHER TRUST

Premium Pursuers







Sainsbury's concept store, Sellyoak

Tesco to launch "Finest" c-stores

Raw store, Shoreditch



Premium Pursuers

PREMIUMISATION DRIVING FOOTFALL

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



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Planet Prioritisers Habitually healthy

Creatures of Convenience Experiential Engagers Premium Pursuers



THANK YOU!

JILL LIVESEY Managing Director Him & MCA



