



**GLOBAL
CONSUMER
TRENDS
2017**

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Introduction

2016 has been a tumultuous year which, at turns, has been positive, negative, and surprising (and occasionally all three at once). Our **fifth** annual Consumer Trends report highlights the pervasive themes that are influencing consumer behaviour across the globe. In collaboration with our international teams in France, Italy, Germany, South Africa, the US and Australia this overview seeks to provide insight into the market today in 2017.

Our findings can be grouped into **four** categories: **Well-Being** (the increased drive to keep mind and body at full health), **Engage** (the need to involve, excite and inspire consumers to action), **Connect** (the desire to interact with and feel part of a community) and **Express** (the urge to demonstrate one's individuality).

No neat system has yet been invented to categorise the wealth of innovation in products and services which have evolved to meet these demands, but certain patterns do emerge. We trace them here, and add colour with a range of real world examples that we hope will give you a better sense of these key trends.

Lulie Halstead
CEO
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Global Consumer Trends 2017

Well-Being

Exclude

Enhance

Mindfulness

Engage

Obsession

Fusion

Activate

Connect

Exchange

Reduce

Community

Express

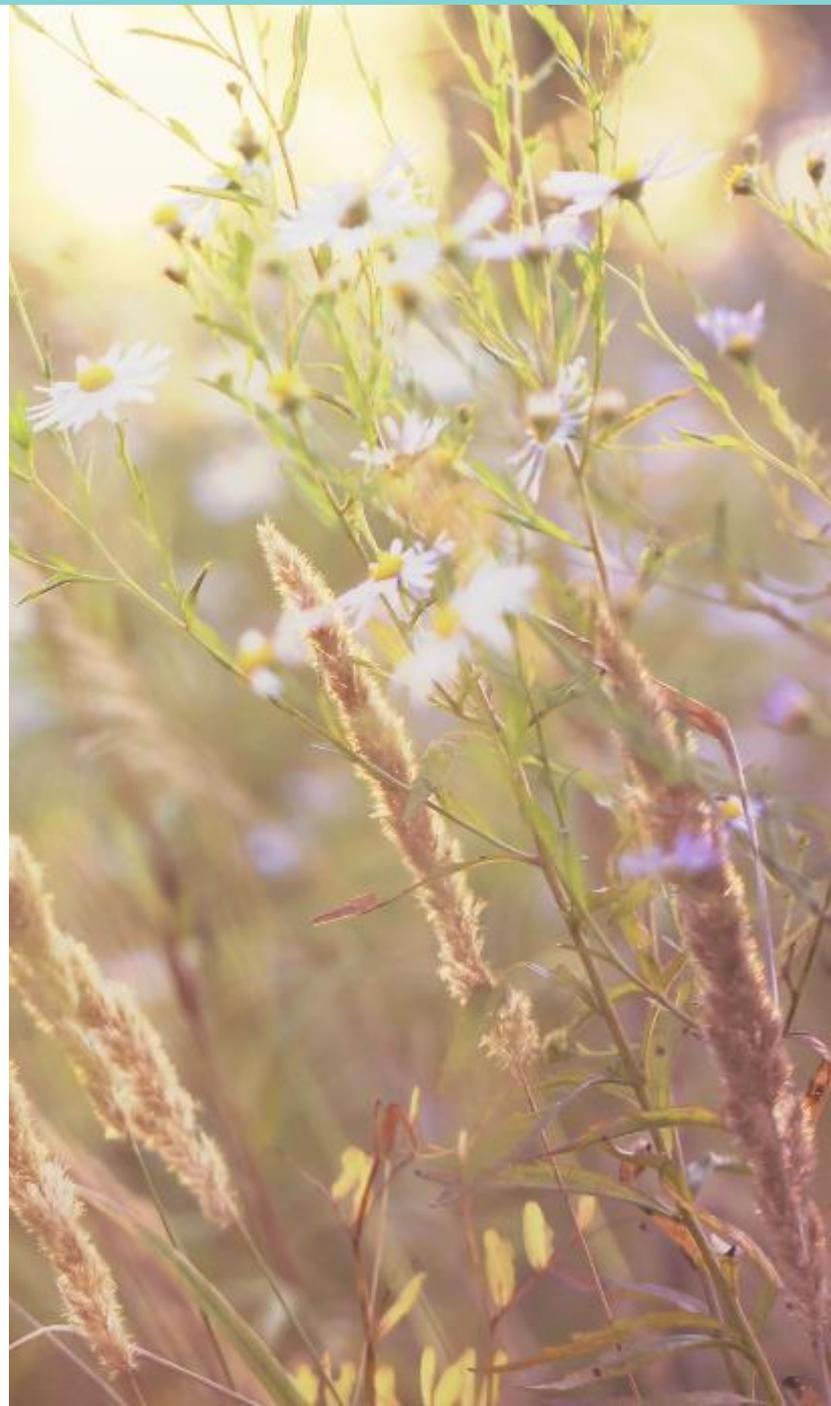
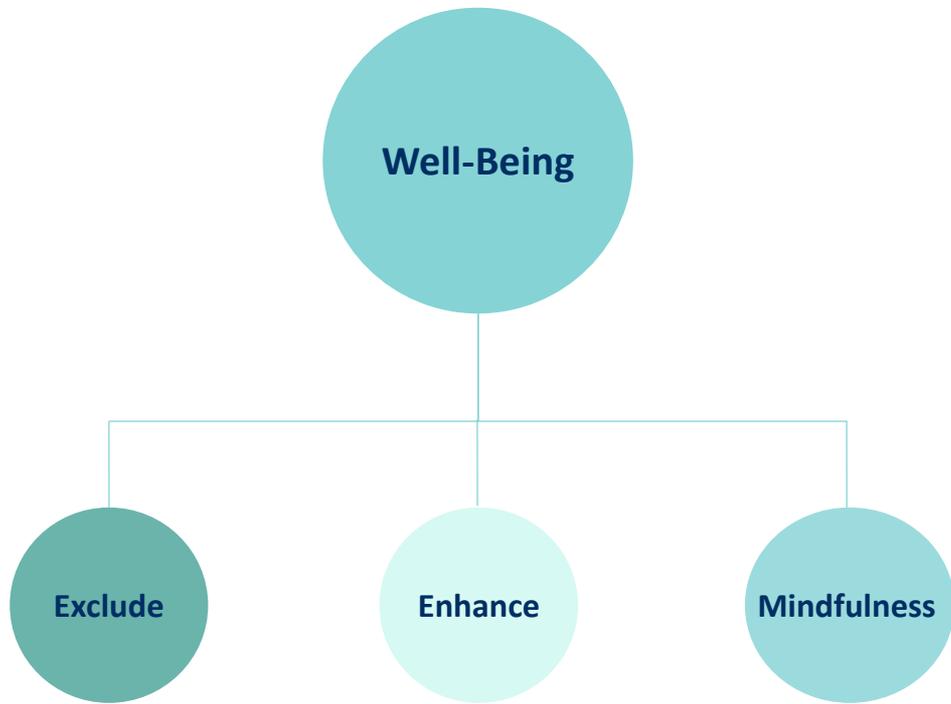
Effortless

Instant

Individual

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Exclude

Removing or excluding naturally occurring elements, typically from food and drink, with the aim of improving health benefits

Natural components of food and drink are being stripped away to reveal more wholesome, hearty and healthy products underneath.

Supermarket shelves are groaning under the weight of vegan, raw, Paleo-friendly, low-sugar snacks and drinks that give consumers all the pleasure of the original products, but support their desire for a more health-driven alternative.

- Increasing introduction of vegetarian and vegan products hitting the market in order to satisfy the 542,000 vegans in the UK alone¹
- Research shows that 12% of new food products launched in the UK in 2015 carried a gluten-free claim, with just 1% of the global population estimated to be a celiac²
- In 2015, the lactose-free dairy market in the US was valued at \$4.69 billion³

Source:

1 Ipsos MORI for the Vegan Society and Vegan Life magazine May 2016

2 Mintel Free-from Foods UK January 2016

3 Technavio Global Lactose-free Food Market 2016-2020

Exclude

Dairy and lactose are two of the latest casualties of the war on potentially less healthy foods. Leading food and drink manufacturers are sourcing ingredients which carry the weight and richness of dairy but are made from alternatives. The resulting products are often classifiable as vegan and lactose-intolerant friendly.

Exclude



Forager (US)

Forager is a business which takes exclusion to the extreme: their creamy cashew-based yoghurt is not only dairy-free, organic, non GMO, free of lactose, gluten and soy, but is also kosher.



Baileys (Global)

A blend of sweet almond oil, almond essence, cane sugar, purified water, vanilla (and of course, alcohol) make **Bailey's "Almande"** edition. It is both gluten- and dairy-free and is illustrative of the move towards plant-based foods.

Lactose-free milk is responsible for 50% of the total growth in Australian dairy milk¹



Bottega (Italy)

Bottega has created a lactose-free liqueur using pistachios from the foothills of Mount Etna. A touch of natural sweetness from the nut makes it palatable as well as vegan and lactose-intolerant friendly.

Exclude

Gluten is also under fire. A huge range of gluten-free products (often commanding higher prices than their gluten-included counterparts) have hit the shelves, offering a range of options for those who are celiac and gluten intolerant, or simply choosing to reduce their gluten in-take.

Exclude



Barney's Beer (UK)

Barney's Beer has removed the traditional base ingredients of a beer - wheat and barley - from its Tundra IPA. Instead, the recipe uses up to 40% fava beans, which are high in protein and minerals and are gluten-free.



Crobar (UK)

You don't *have* to go animal-free to go gluten-free and there's no better example than **Crobar**. Made from roasted ground crickets – about 32 per bar – these protein-packed snacks are less than 150 calories each.

8% of Brits avoid gluten as part of a healthy lifestyle¹



Fair Spirits (France)

Fair. Vodka is distilled from quinoa instead of the more common wheat or barley, both of which contain gluten naturally.

Exclude

The number of alcohol-free alternatives is on the rise. Whether consumers are motivated by health concerns, weight loss or even the dangers of drink driving, they are turning to de-alcoholised beverages that aim to offer an 'adult' flavour and drinking experience, but with little or no alcohol.



MADD Virgin Drinks (Canada)

MADD (Mothers Against Drunk Driving) offers several iterations of alcohol-free beverages with sparkling, red and white wine available by the bottle, and virgin margarita, mojito and craft brewed lager available in cans. Not only do proceeds go to support a nation-wide cause, they also offer consumers the opportunity to enjoy a taste of their favourite alcoholic beverage with just one third of the calories.



Big Drop Brewing Co (UK)

Processes used to remove alcohol such as heating or reverse osmosis can have an impact on flavour and character. For this reason, **Big Drop Brewing Co.** have chosen to keep just 0.5% alcohol, lending the beverage a lot more character than its 0% ABV competitors.



Sapporo+ (Japan)

Sapporo+ is an alcohol-free drink with all the other characteristics of beer. It is said to suppress an increase in blood sugar levels after a meal and so helps to regulate energy levels. Despite being launched just 5 days after the Tohoku earthquake, Sapporo+ sold so well that the brewery doubled their initial sales targets after just 2 months.

Exclude

Consumers' desire for healthy alternatives to alcohol (or a reduction of alcohol) has given rise to numerous new product launches. Rather than relying purely on dealcoholising, innovators are aiming to recreate the complexity of aroma and flavour that drinkers love by blending natural fruits, herbs, and botanicals.



Juice crawls in NYC (US)

'Juice crawls' are the alcohol-free version of a good old fashioned bar hop. Tickets range from \$15 to USD \$50 for a guided tour through the best juice spots in Soho and the East Village of New York, with some crawls including tastings of up to 25 juices from 5 bars.

29% of both Chinese imported wine drinkers and US regular wine drinkers "buy more food and drink that excludes certain elements e.g. gluten, sugar, meat, than I used to"¹



Seedlip (UK)

Seedlip is world's first distilled, non-alcoholic drink designed for mixing with tonics, juices and teas. These 'spirits' are flavoured with natural botanicals such as all-spice, cardamom, lemon and thyme. They are sugar, sweetener, alcohol and calorie free.

Exclude



Enhance

Engineering food & drink, making it 'better for us' than the original

The addition of 'boosters' such as protein, vitamins or antioxidants to enhance everyday products and elevate them to nutrient-packed alternatives to the original is proving ever popular.

While Exclude seeks to eliminate the 'less desirable', Enhance focuses on the addition of elements to boost food and drink, elevating their health and well-being benefits.

- Protein has become the 'hero' ingredient in a wide range of newly launched food products
- Anti-oxidants also feature heavily in the raft of health-oriented products released in 2016; their inclusion is said to improve one's general well-being
- While meal delivery services are not new, there has been a surge in businesses who provide personalised meal plans with enhanced food and snacks to help consumers reach their health goals
- Consumables have even become the vessel for anti-ageing and youth preserving benefits

Enhance

Protein-packed snacks have made their way to grocers around the world. Often conveniently packaged in single serving sizes, these everyday foods and drinks are going under their own transformations into consumables which now support a more healthy approach to eating.

Barbell Brew (US)

A high-protein, low-carb beer which comes in under 100 calories per bottle and still manages to squeeze in 21.8g of protein – about the same as a sirloin steak.

Unsurprisingly, it is offered in six-packs for dedicated gym goers who don't want to give up their favourite tipple.



Coconut Water Cans (US)

Available in coffee, vanilla, chocolate and almond, **Coco Libre** boost the health credentials of coconut water with a dose of 15g of protein. The source of protein is simply milk from grass-fed cows; as such, Coco Libre combines all the good from natural dairy (with none of the fat) with coconut water.



Mars & Snickers Protein (Global)

Mars and Snickers have both produced editions of their snacks which clock in at under 200 calories and 18g of protein without compromising on flavour.

Enhance

'Medical' food, designed to deliver wellness is on the increase – often tailored for those with specific medical or health benefits.



Hormel Vital Cuisine (US)

Hormel have released a medical food range which includes ready-to-eat meals, nutrition shakes and protein powders which have been crafted to address the specialised needs of cancer patients. They have consulted top oncology nutritionists to create vitamin- and protein-dense products.

62% of US regular wine drinkers and 59% of Chinese imported wine drinkers agree that they 'look for ways to enhance my over all well-being'¹



Barley + Oats (US)

This specialised meal plan, designed for pre- and post-natal women, delivers single portions of nutrient-rich food to your door. They also offer sweets and snacks focused on vital nutrients in the right proportion to support women through their childbearing years.

Source:

1 Wine Intelligence, Vinitrac® US, October 2016, n=2,001 regular wine drinkers

Wine Intelligence, Vinitrac® China, October 2016, n=1,001 urban upper-middle class imported wine drinkers

Enhance

Enhancements aren't just limited to protein and vitamins. Products boosted by the addition of naturally occurring extracts go as far as to state that they deliver anti-ageing and anti-dehydration benefits.

Itokyuemon Yokan no Midori (Japan)

This product is the result of a collaboration between Kyoto-based tea company **Itokyuemon** and winemaker Tetsuo Kuroi of Tamba Wine. It is a wine made from matcha green tea, but tastes just like white wine - plus all the antioxidant benefits that matcha offers.



Anti-aGin (UK)

The makers of this gin have dosed it with 90g of drinkable collagen and a raft of traditional botanicals which have a long history of being used in natural skincare products: chamomile, tea tree, nettle and witch-hazel. The gin is said to plump up consumer's skin and smooth out wrinkles.

Fanta (Japan)

It's a seasonal treat in Japan to enjoy a plump watermelon with a sprinkle of salt during the summer months; it's just what is needed to hydrate and replenish the essential salts lost in the heat. **Fanta** has released a watermelon and salt flavoured soft drink with the aim of sparking summer memories and rehydrating the nation.





Mindfulness

Respecting our personal mental well-being, particularly within our increasingly demanding and fast-paced lives

It has never been harder to disconnect from the world and relax, free from the distraction and stresses of daily life. Companies are now tapping into people's search for peace and offering them the services and products to enable de-stressing.

Mindfulness is an ancient concept whose central tenet is of awareness, acceptance and non-judgement, leading to both physical and mental health benefits.

- In 2015, the mindfulness industry was valued at nearly \$1 billion globally – not including mindfulness apps and gadgets which were released in the same year¹
- The need for mindfulness is clear: a UK survey showed that 29% of people believe they are stressed, 24% per cent suffer from anxiety and 17% from depression
- Alongside guided meditation apps and in-person services, virtual reality is increasingly giving people the opportunity to escape the pressures of the real world

Source:

¹ IBISWorld <http://fortune.com/2016/03/12/meditation-mindfulness-apps/>

² YouGov and the Mental Health Foundation <http://www.independent.co.uk/life-style/health-and-families/health-news/practice-mindfulness-says-mental-health-charity-10254799.html>

Mindfulness

Ongoing development of products that support and develop the notion of personal well-being.



Counting Sheep Coffee (US and Canada)

A start up in Canada has created Counting Sheep Coffee. Their coffee is decaffeinated and blended with organic valerian root (a herbal sedative) creating a blend which, the company claimed, helps the consumer relax and unwind.



KitKat (Colombia)

KitKat have been bringing soothing massages to the masses by installing interactive billboards across Bogotá, Colombia. Whenever somebody in the city Tweets words such as “tired” or “stressed” a bot automatically directs them to the nearest massage-giving bus stop.

Chinese imported wine drinkers aged 30-39 are significantly less interested in mindfulness than those aged 40-54 (46% and 52% respectively rank it highly)¹

Source:

1 Wine Intelligence, Vinitrac® China, October 2016, n=1,001 urban upper-middle class imported wine drinkers

Mindfulness

Quiet hour used to be confined to nursery school – now it can be found in shops, offices and also via an app.



The Indigo Project (Australia)

This Sydney-based studio offers lunch time napping classes for local business people. As well as providing a calm and meditative area where workers can sleep off their stresses, they offer yoga classes, mindfulness workshops and (coming soon) art therapy.



ASDA Quiet Hour (UK)

Several **ASDA** branches have introduced a 'quiet hour'; they reduce noise by turning off escalators, in-store music and display televisions to make a more peaceful environment, particularly appropriate for people with autism and other conditions.

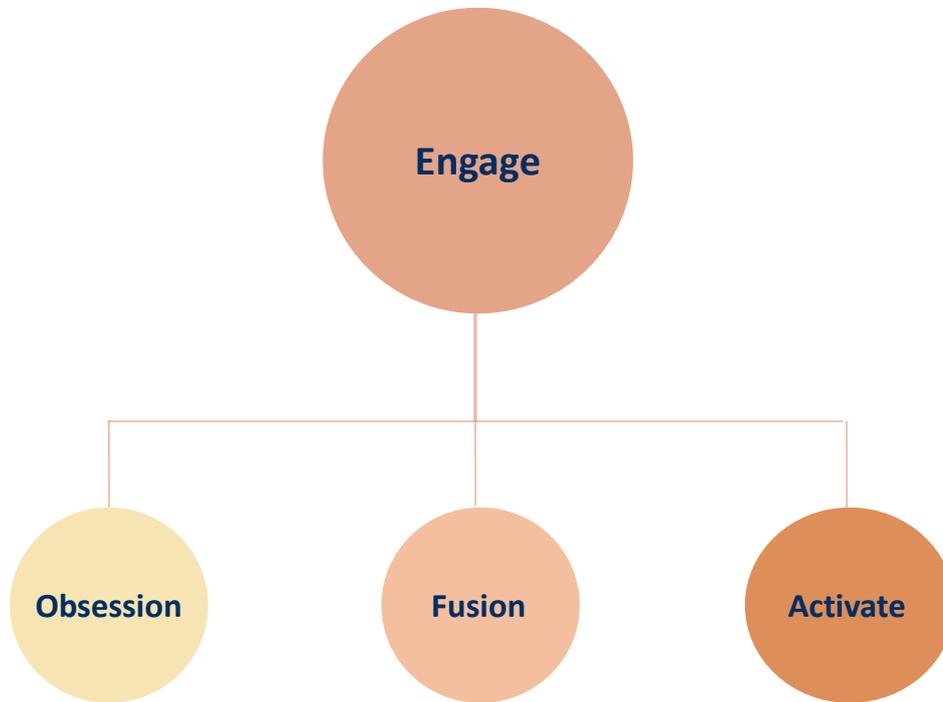


Perfect Beach VR (Global)

Designed for Google Cardboard, this app provides a relaxation experience for users. The VR submerges you in all the sights and sounds of a private beach. Guided meditation and tranquil relaxation music complement the seaside vistas and encourage you to take a step back from the real world and engage in mindfulness.

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Obsession

Focusing single-mindedly and clearly on one purpose, product or service

Obsession goes beyond simple passion. It is a singular commitment to something, whether it be crafting the perfect cocktail or celebrating a single ingredient.

Examples abound in all FMCG and services categories of businesses which have taken a single-minded, clear and focused approach to a single purpose, product or service

- Single-dish restaurants have taken the world by storm; they lure in customers with the promise that their obsession will translate into perfectly executed dishes every time
- A booming market of niche accessories gives connoisseur consumers more fodder for their obsession

Source:

1 IBISWorld <http://fortune.com/2016/03/12/meditation-mindfulness-apps/>

2 YouGov and the Mental Health Foundation <http://www.independent.co.uk/life-style/health-and-families/health-news/practice-mindfulness-says-mental-health-charity-10254799.html>

Obsession

Some brands and beverages have amassed cult followings. Bars dedicated to serving a single drink or spirit have sprung up around the globe. Whether they have been opened by true fans or the brand-owners themselves, these bars offer a place for the like-minded to gather.

Obsession is the most important trend for both US and Chinese wine drinkers¹

The Negroni Bar (UK)

Campari's #RediscoverRed campaign culminated in a pop-up bar dedicated to Negronis in London. Over 30 different combinations and flavours were on offer but there was one constant: they all contained and celebrated Campari.



Tuxedo (Australia)

Australia's first espresso Martini bar, **Tuxedo**, offers a total of six different caffeine-injected cocktails. The classic – also available on tap – sits on the menu next to chocolate espresso Martinis and cold-drip coffee Martinis with either vodka or rum providing the alcoholic kick.

Obsession

Single-dish restaurants are also a testament to the dedication of entrepreneurs and chefs who wish to evangelise about their favourite dish or ingredient. Whilst not conceptually new, the single-dish trend is being constantly refreshed with new ideas.



Mister Lasagna (UK)

The unflinching dedication to a single product is best exemplified by this London restaurant which lists 21 varieties of lasagna on their menu. Founder Alsesandro Limone uses different combinations of vegetables, meats and cheeses to create variations on a theme which appeal to all the lasagne-obsessed – they even have a vegan version.



Kola House (US)

PepsiCo's first foray into the restaurant business, **Kola House's** menu is dominated by dishes which make the most of the kola nut (the original base of Pepsi Cola). The nut has a flavour half way between chocolate and coffee and appears in dishes as diverse as pork shoulder *carnitas*, grilled mushrooms and a host of cocktails.

Saint Marc (US)

This restaurant sells a grab 'n' go selection of 11 different types of crispy gourmet bacon at their dedicated Bacon Bar. The meat is available in a variety of sweet and savoury flavours, including apple pie, coffee, wild cherry and hickory smoked pepper by the slice.



Obsession

There is no shortage of gadgets and accessories designed to enhance the aficionado's experience. Obsessives delight in the range of niche products designed to deliver the perfect taste.

Obsession



Norlan (UK)

For the true whiskey connoisseur, the **Norlan** glass is the only choice. This hand-blown glass is double walled, creating a hollow body glass that intensifies the colour of the spirit in the glass. A 'protrusion' inside the glass has been designed to increase the rate of oxidization and reduce volatility so that the whiskey's aromatics can emerge at their best.

iSommelier iFavine (Global)

The iSommelier is a next-generation decanter which aims to perfectly aerate and age a wine within minutes, reducing the need for costly cellaring. The wine aficionado decants their bottle of choice into the iSommelier which then filters and purifies ambient air (removing moisture, dust and off odours) and then isolates different chemical compounds to soften the wine's tannins and enhance its aromas.



52% of US regular wine drinkers and 45% of Chinese imported wine drinkers 'admire producers who are devoted to their cause'¹

Source:

1 Wine Intelligence, Vinitrac® US, October 2016, n=2,001 regular wine drinkers

Wine Intelligence, Vinitrac® China, October 2016, n=1,001 urban upper-middle class imported wine drinkers



Fusion

Breaking traditional boundaries by combining, merging and blending between products & categories

Businesses are putting together creative and unusual combinations of flavour, brand and category, in order to offer something more than the simple sum of its parts.

Traditional boundaries are being broken: cross-category and cross-brand partnerships have the power to engage consumers, creating memorable and 'share worthy' products. Martha Stewart's and Snoop Dogg's jointly hosted cooking show is one of the more unusual pairings to have debuted in 2016 – and was renewed after just two episodes.

- Businesses are diversifying and branching out from their traditional industries to evolve into lifestyle brands (which may be easier for consumers to identify with)
- Alcohol is being fused with non-alcoholic food products to deliver familiar flavours through a new medium
- Different types of alcohol are being blended together to continue the development of new cross-category beverages

Fusion

Alcoholic beverages are increasingly blended with the flavours from popular foods. The two categories – food and drink - compliment each other: the flavour profile of snacks can lend a burst of extra flavour to the beverage, while beer, wine and sake for example, add an alcoholic kick to consumers’ favourite foods.

Nestlé (Japan)

Nestlé have long blended their chocolate wafers with unusual flavourings – from wasabi and soybean through to purple sweet potato – but this is the first edition to combine them with alcohol. The resulting white chocolate treat has 0.8% alcohol and a distinctive whiff of sake.



Ben & Jerry's (US)

Ben & Jerry’s joined forces with **New Belgium Brewery** to craft an ale with all the chocolate chip cookie dough flavours you’d normally find in their ice cream. \$50,000 of the product’s profits will go towards “Protect Our Winters”, an organisation that raises awareness of climate change.



40% of wine drinkers in China consider product and brand mergers to be compelling ¹

Source: 1 Wine Intelligence, Vinitrac® China, October 2016, n=1,001 urban upper-middle class imported wine drinkers

Fusion

The beer, wine and spirits categories are becoming ever more blurred as companies increasingly fuse one, two or all three together to create new products.

Fusion

Savoury snacks experienced a growth of 18% from 2014-15, with smoke, vinegar, honey, spice, beef, pizza and barbeque flavours dominating new products in North America¹



Vicente Gandia (Spain)

The **Sandara** range is a collection of sparkling grape-based wines which have been flavoured. The Wine Mojito blends white grapes with lime and mint, while the Premium Sangria is a mix of sparkling red wine and lemon, orange, raspberry, strawberry and cherry.



Lotus Scoop (US)

This company combines whole fruits with fresh vegetables, homemade caramels, seeds and herb infusions to create ice creams that fuse sweet and savoury (such as Sweet Potato & Sea-Salted Banana Caramel) and heady indulgence with sensible nutrition.

Bloody Shiraz Gin (Australia)

Yarra Valley Shiraz grapes are steeped in gin for 8 weeks, creating a new take on sloe gin which actually has ageing potential. The concentrated flavour profile of the Shiraz evolves in the bottle and develops secondary aromas after a year or two.



Fusion

Some partnerships prove that truth can be stranger than fiction. The unexpected fusion of seemingly disparate entities often surprises and delights with unexpected combinations.

Aston Martin x Silver Cross Surf (UK)

British carmaker **Aston Martin** is using their new Mayfair store to promote their newest product to market: a pram made with Silver Cross. The combination of Aston Martin's top line engineering and Silver Cross's experience results in this, the most luxurious pram, coated in a magnesium alloy and available for £3,000.



Posti (Finland)

The Finnish postal service, **Posti**, have started mowing their customers' lawns. A drop in traditional snail mail has left postal workers with time to spare. To take advantage of this service, homeowners order online and provide their own lawnmower. A 30-minute session each week costs 65 Euros a month and is tax-deductible.

KFC (China)

Fast food giant **KFC** is developing a new menu for its customers in Hong Kong to cater to local demand. They now offer Japanese-style sukiyaki hot pot meals (a Beef and Seafood Hot Pot) with a side of hot white rice for \$49.90 HKD. Rest assured, their usual Kentucky-fried chicken is still available.



Activate

Creating brand memorability through interaction

Companies are continuing on their journeys to venture out to interact with consumers in some of the unlikeliest places.

Activating customers is not as easy as it once was. In a crowded marketplace, unique, noteworthy and often photogenic gambits need to be employed to create brand memorability.

- There is a renewed emphasis on 'try before you buy' – customers are being given the opportunity to engage with products from all industries before committing to a purchase
- Advertising is breaking out from the 2D to 3D, with traditional marketing spots – such as bus stops – encouraging interaction through the use of touch screens, music, free Wi-Fi and charging stations

Activate

Retailers are fighting harder than ever to show that consumers' hard-earned cash should end up in their pockets rather than someone else's. Pop-up residencies on the high street give them an opportunity to showcase their wares in an engaging and interactive way and create lasting memories.



Ikea (UK)

Ikea launched a pop-up restaurant where diners eat for free but had to assemble their own plates of Scandinavian-themed dishes. It acted as a showroom for Ikea products – down from the utensils up to the kitchen sink – and allowed consumers to engage with them as they would on a daily basis.



Tesco finest* Wine Bar (UK)

Tesco took up temporary residency in a popular Soho street to share the 70-strong selection of wines which make up the finest* range. Priced from a very reasonable £3 per glass, visitors were treated to a range of Tesco cheese, cold meats and olives, taking wine from the shelf and putting it in context.

Dyson (UK)

Like most items of homeware, it is difficult to try a **Dyson** product before you buy it. By opening their own proprietary store in London, Dyson has allowed customers to see, touch and use their products in context. This 'showroom' is not focused on products sales, but purely on product interaction.



Activate

Businesses are using technology to spice up the mundane. Areas like bus stops and bars – where long queues and waiting are expected, are the perfect spaces to grab the attention of a captive audience.



Deep Spring (Australia)

Deep Spring launched the first outdoor digital colouring book onto the streets of Sydney and Melbourne. Promoting the relaunch of their natural and organic range of sparkling mineral water, these screens encourage people to interact and engage with the brand.

Box (South Korea)

This wine bar boasts interactive tables which allow patrons to handpick their favourite wine and put together their orders digitally. The menu is projected onto a normal table and offers more information than a traditional menu, encouraging people to experiment.



Santander (Brazil)

Santander are targeting the Brazilian Millennial market with the installation of branded interactive bus stops across Sao Paulo. These fully-equipped stops have free Wi-Fi, mobile phone chargers, karaoke stations and a range of sports, drinks and raincoats depending on the user's mood and the weather. They have recorded the results and released a web series featuring the public's interaction.



Activate

Savvy marketers are taking their businesses out of their original confines: Internet-only retailers are buying into brick-and-mortar premises and companies selling simple commodities are establishing themselves as lifestyle brands to better engage with their customers.



Minedrip Coffee Shop (Japan)

Partly funded by a crowdfunding campaign, **Minedrip Coffee Shop** is a pop-up which allows every customer to make their own self-drip coffee. Customers can personally engage with the product and have total control over their final beverage. The company originally operated as an online coffee bean and coffee accessory retailer, so this brick and mortar shop allows them to engage with consumers face-to-face.



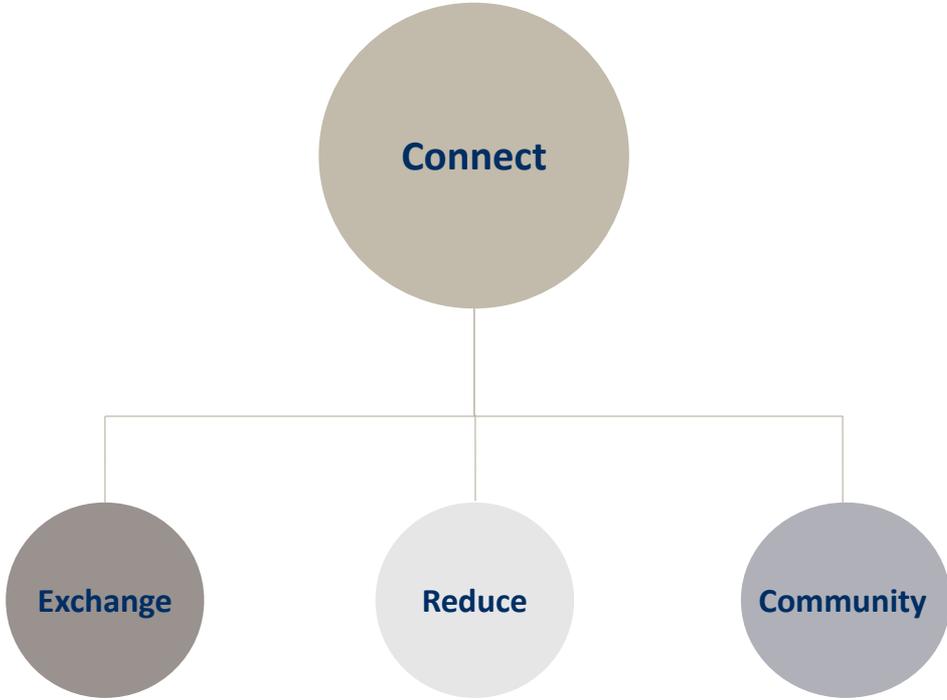
Mercedes-Benz (China)

Mercedes-Benz me is a package of lifestyle extras designed to enhance the customer experience. In Beijing, Mercedes opened an 'experience centre' to bring the concept to life with 2 restaurants, a juice bar and a cocktail bar.

Only 33% of Chinese imported wine drinkers aged rank this trend as important, while 42% of 30-39 year olds rank it highly¹

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Exchange

Exchanging knowledge, services and products with others as part of the collaborative economy

Organisations and community groups are helping people to use their skills, goods and services to strike a barter deal instead of simply exchanging only cash.

Traditional businesses are being ousted by communities of people united by online platforms who trade their own resources and skills at a reduced price. Platforms take a commission, sellers extract value from their goods or services which they might otherwise not be using, and buyers get a good deal: everybody wins.

- The sharing economy is predicted to be worth over £9 billion in the UK by 2025¹
- This type of exchange for use of private short-term property rental is likely to grow much faster than the rate of traditional rental sectors – and be worth \$335bn globally by 2025²

Source:

1 ONS The feasibility of measuring the sharing economy, April 2016

2 PWC The sharing economy global analysis 2014

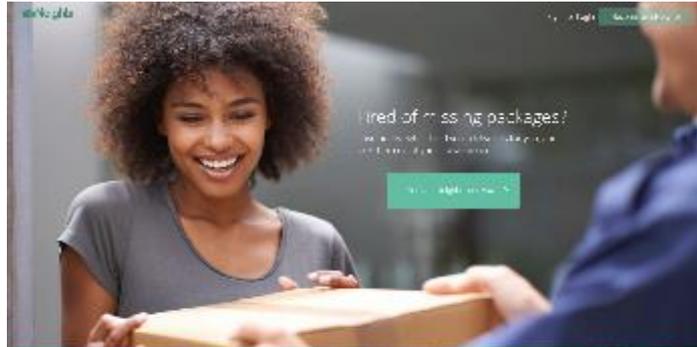
Exchange

Time and space are both commodities with wildly uneven distribution across the population; some have a lot and others, not so much (particularly in urban areas). Individuals now have the power to offer these resources to others for a fee – which is often much lower than the going business rate.



Blogfabrik (Germany)

Run by Kiosk Agency, a traditional 70 year old business, **BlogFabrik** is a co-working space that invites freelancers in creative media to work on their projects in a rent-free office. In exchange for the space (which includes a conference room, video-editing suite, photo studio, lounge and kitchen), they simply provide content for the blog and magazine.



eNeighbor (US)

eNeighbor is a platform which connects neighbours or local businesses who are willing to accept a delivery on your behalf. You send your delivery to these trusted and vetted locals for a cost of just \$2.50.



Blabla Car (Europe)

Blabla Car connects drivers (with room to spare in their cars) with travellers. They sell space for people and their luggage which helps mitigate the cost of fuel and tolls while also reducing emissions. Travellers get a discounted rate and a more enjoyable experience shared with like-minded strangers.

Exchange

Exchange is not limited to the transfer of money: goods, skills and time can all be exchanged in place of cash.



L'armoire des petits (France)

This website facilitates the exchange of second-hand children's clothes between families. As children quickly outgrow their wardrobes, parents can exchange old clothes for a number of virtual credits. They can then use these credits to 'purchase' used items in a larger size from another contributor.



Biscoitos Zezé (Brazil)

Biscuit company **Zezé** has placed footballs in lockers across the Fragata district of Pelotas. Children can access these lockers with special keys so they can take out a ball and play a game of football amongst themselves.

29% of US regular wine drinkers aged under 30 rank Exchange as important to them in contrast to just 20% of regular wine drinkers aged 40+¹



La Settimana Del Baratto (Italy)

During this week, visitors are matched to B&B hosts from all across Italy looking for specific goods and services in exchange for free room. Services can range from language exchange to music lessons, homestay swaps and homemade jam.



Reduce

Recognising and prioritising the significant environmental and social impact delivered by reducing waste

Whether they use compostable materials, give a new lease of life to waste products or simply make space for lumpy and bumpy produce on their shelves, businesses are increasingly focusing on reducing waste.

- Biodegradable is in: products which disintegrate rather than accumulate in landfill sites are becoming more mainstream
- Retailers are responding to consumer demand and stocking their shelves with less-than-perfect fresh fruit and vegetables, with the additional benefit of lower prices
- Digital platforms (mobile and desktop) allow quick, easy and cheap redistribution of perishable goods to consumers and charities

Reduce

Innovative companies are deploying new technology to tackle the now-mainstream corporate need of reducing waste. Using 100% biodegradable and recyclable packaging is one crucial way of reducing the amount of harmful waste that goes to landfill.



Paint360 (UK)

This company breaks down waste paints and re-engineers it into a range of good quality emulsion paints. The process diverts waste paint from streams, saves resources during the manufacturing process and reduces carbon. In all, at least 90% of the paint in the tin is recycled.



Carlsberg (Global)

The **Carlsberg Green Fibre Bottle** is the creation of the joint efforts of EcoXpac and Carlsberg. They have fashioned a glass and metal free bottle using sustainable wood fibres. While it is still at prototype stage, it is due for launch in 2018.



Comp-A-Tent (UK)

The **Comp-A-Tent** is a 100% recyclable tent designed for festivals: after 120 days in a composting facility, it breaks down into carbon dioxide, water and soil. Campers can pre-order their tents, collect them on-site and then, at the end, simply pull it down and put it in a composter.

Reduce

Retailers are giving less than perfect produce and short-dated perishables a new lease of life for use in processed foods, discounted ranges of fruit and veg or – to prevent it going to landfill - redistributed to charitable organisations.

Tesco (UK)

Supermarket giant **Tesco** has launched a range of low-priced 'wonky' fruit and vegetables, which includes parsnips, potatoes, strawberries and cucumbers. These products may not conform to the perfect size, shape or colour consumers have come to expect, but are 'just as tasty' and come at a good discount.



FoodCloud (Ireland)

FoodCloud is a platform which connects businesses with surplus food with charities who need it, in a bid to help the 1 in every 8 people in Ireland who are experiencing food poverty. Charities include breakfast clubs, homeless hostels and family support services.



Wtrmln Wtr (US)

Blemished, discarded watermelons find a new lease of life at **Wtrmln Wtr**. Watermelon farmers have the opportunity to turn surplus and damaged produce into profit rather than landfill waste and Wtrmln Wtr benefit from lower overheads. Everyone wins – including the environment.

Reduce

Larger companies are upping the ante in their on-going commitment to reducing the impact their operations have on the environment.



H&M (Global)

H&M has announced a pledge to become “100% circular”: this means they hope to use only recycled or other sustainable materials in the production of their clothing. Almost 3/5ths of clothing ends up in landfill as textile recycling facilities currently cannot separate fabrics made up of blended polyester, nylon and cotton.



Accorhotels (Global)

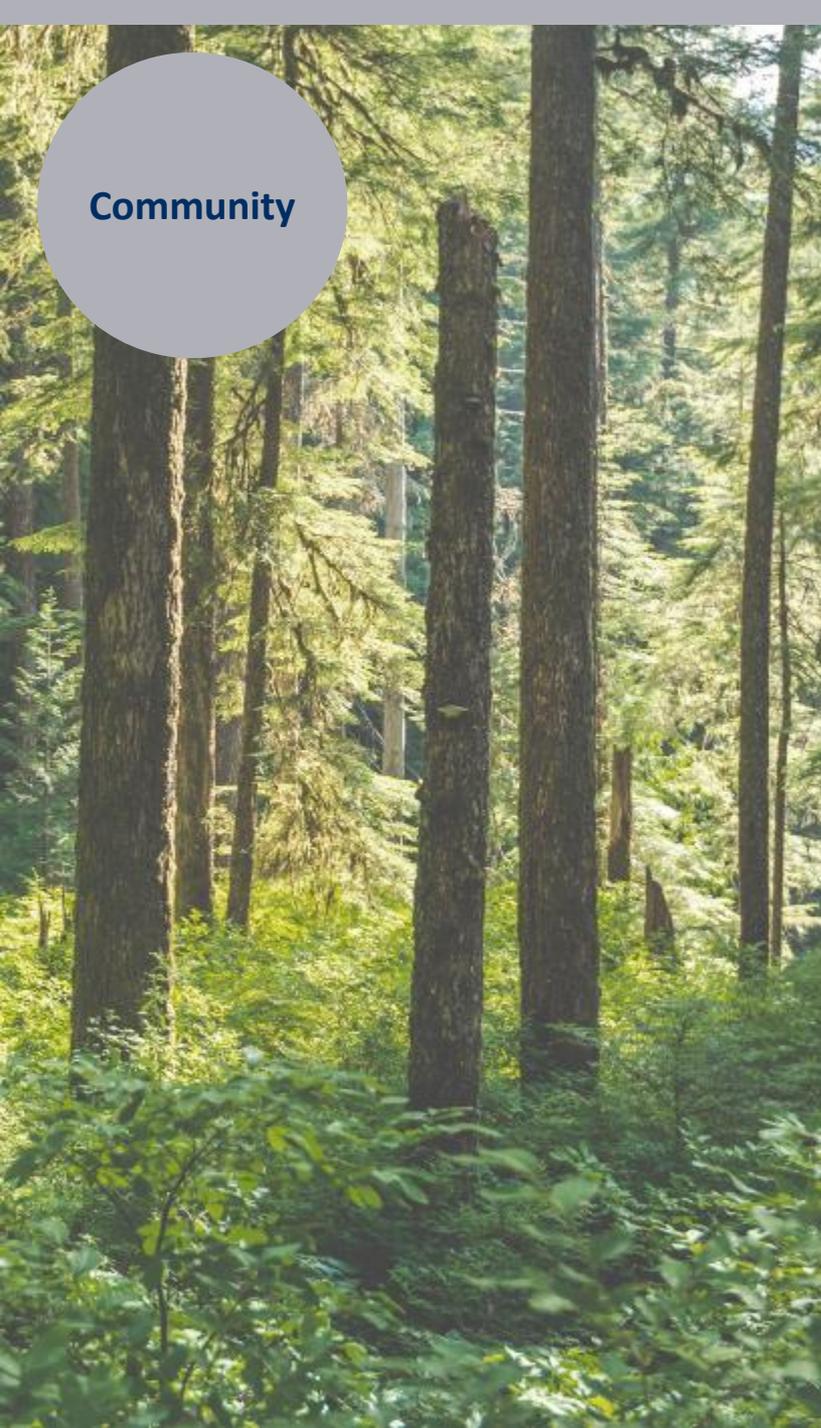
AccorHotels plan to reduce food waste by 30%, namely by sourcing more local ingredients. They hope to plant vegetable gardens in 1,000 of their hotels by 2020.

Chinese imported wine drinkers aged 30-39 are most likely to ‘choose products or services because they actively reduce packaging waste’ while Chinese imported wine drinkers aged 18-29 are the least likely¹



Google (Global)

Google has announced that all their data centres and all their international offices (employing over 60,000 staff) will be entirely powered by renewable energy in 2017.



Community

Feeling better about ourselves by supporting local & community organisations

As consumers turn ever more to local produce and tradespeople right on their doorstep, businesses are trying to connect with smaller communities of people whether they be united by place, gender or orientation.

In this digital age, distance is no longer an obstacle and seemingly disparate groups of people from the world over can connect and unite for the common good.

- Governments, such as that of Venezuela, are employing novel, community-oriented techniques to solve deep-rooted problems such as food shortages and homelessness
- When united, individuals are empowered to take control of their local community and to pursue what is good for themselves (rather than big business)

Community

It is now becoming widespread conventional wisdom that an engaged community can solve shared problems better than either an individual or through political bureaucracy. Governments are connecting with and mobilising locals in order to improve their shared environment and resolve social issues collaboratively.



Crowdfunding buys beach (New Zealand)

Almost 40,000 people in New Zealand donated nearly NZ\$2.3 million to buy a stretch of beach in the **Abel Tasman National Park**. A businessman interested in the land lost out on the 7 acre plot to these local campaigners who wished to keep it open and accessible to all as a national park.



There's A Better Way Program (US)

The city of **Albuquerque**, New Mexico has launched a program which employs the homeless to work on cleaning up the local community through urban beautification projects. A van collects and drops off homeless volunteers who are paid USD\$9 an hour, offered a free lunch and get the option of a night's shelter if they need it.

Female US regular wine drinkers consider 'Community' focused products and services more important than their male counterparts (52% vs. 45%)¹

Venezulan Government (Venezuela)

As **Venezuela** heads into a major economic crisis, the country's president is encouraging citizens to grow fruit and vegetables on their own balconies and roofs. Data shows that in 3 months, 135,000 Venezuelans managed to produce 273 tonnes of vegetables, fruits and herbs in urban settings.

Community

Some companies are focusing on bringing production away from industrial giants and back to local communities; both Agricool and #MakeSmallBeerBig put manufacturing back into the hands of local workers.



#MakeSmallBeerBig (US)

Craft brewers across all 50 states teamed up to create a single beer. 100 craft brewers used the same recipe and bottled it in a can which features the names of all 4,490 small and independent brewers across the US, connecting a community spread across the country in order to celebrate **American Craft Beer Week.**

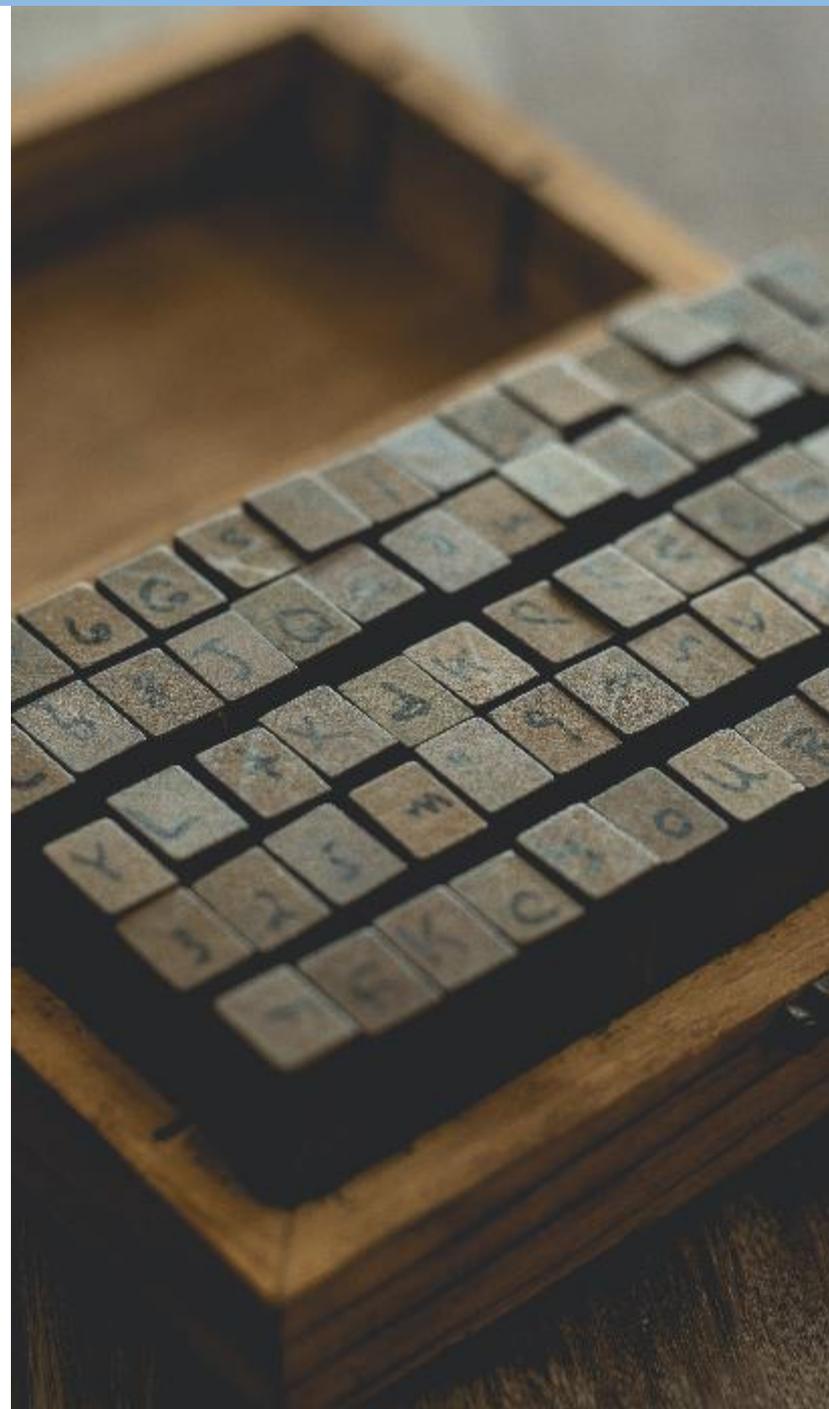
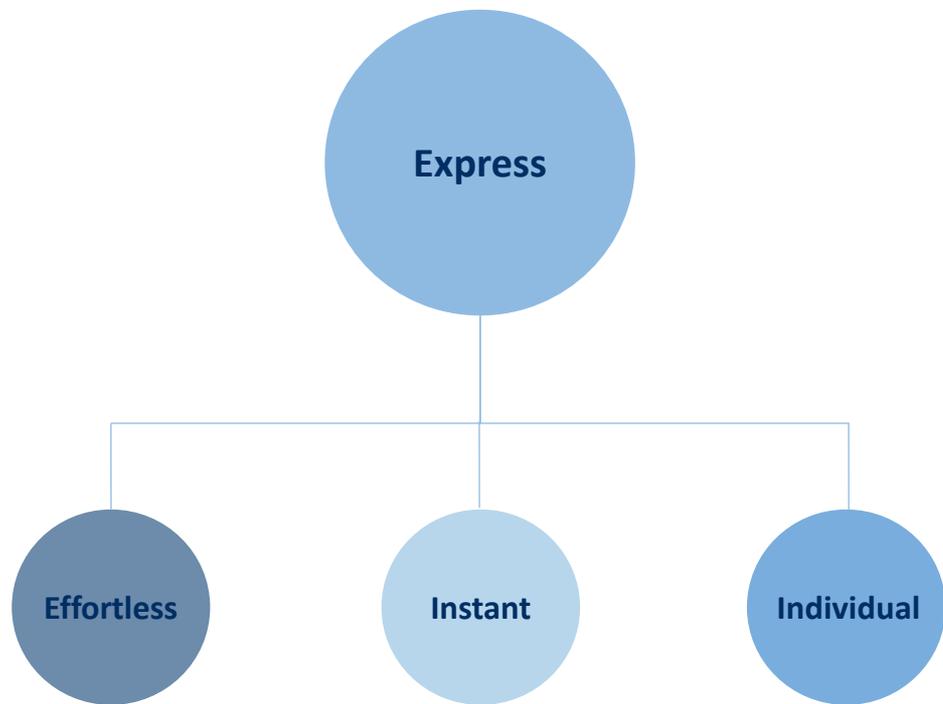
Agricool (France)

Agricool aims to bring farming ever closer to home. To do this, they have designed urban farms which slot neatly inside shipping containers. Rather than the leafy greens found in other container farms, they are focusing on fresh fruit such as strawberries, which are notoriously difficult to get right. Each container can produce 120 times more than a field of the same 30m². A closed loop system for water and nutrients reduces water use by 90% and reduces the need for chemicals and pesticides. They are so low maintenance that anybody can maintain the system. They hope the containers will one day supply whole urban areas while reducing emissions, costs and delivery times.



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Effortless

The desire for increasingly seamless transactions and improved efficiency

Making life and transactions quicker, seamless and low-stress has become of paramount importance for businesses seeking to provide expected and more desirable consumer experiences.

- Technology continues to replace complex personal interactions with increasing functionality delivered by ‘just one click or tap away’
- The traditional shopping journey of item selection > check out > payment is being reduced to simply ‘item selection’ as technology begins to automate
- Studies show people are using fewer apps for longer as they declutter their digital desktops and focus on apps that deliver the most¹

Source:

1 Nielsen Mobile NetView 3.0 2015

Effortless

Businesses are embracing improving technology to instigate real change in the way consumers shop.

Amazon Go (US)

Amazon is upping its game in the grocery sector and trialling a bricks and mortar store for employees in Seattle. Would-be customers open their app at the beginning of their shop and then simply load up their baskets. Technology automatically records whatever you pick up off a shelf (or put back) and tallies your total. Cues and checkouts are eliminated: you simply leave the store when finished and Amazon charges your account.



M Social Singapore (Singapore)

M Social Singapore is a slick operation. Self check-in is facilitated by a kiosk in the lobby and smart phones preprogrammed with city guides are available in every room. The same phones can be used to set up WiFi hot spots for guests when they're out and about in the city.

US male regular wine drinkers find effortless transactions significantly more important than their female counterparts (25% vs. 17%)¹



Nespresso (Australia, UK, US)

A revamped and renewed 'self-selection' service has been launched for Club Members at several **Nespresso's** across the world. Customers select their chosen coffee capsules from a self-replenishing wall of coffee and simply put them in a carrier bag. An automated machine instantly analyses the contents of the bag and tots up the total in seconds.

Effortless

Traditional transport continues to be disrupted by the introduction of new technologies. As ownership of assets such as cars, motorbikes and bicycles all require capital (and have high maintenance costs), more and more people are turning to easier – and cheaper – alternatives.



UberWeddings (India)

Uber's latest foray into the Indian market has resulted in a partnership between them and WedMeGood, an Indian wedding planning website. The service UberWeddings will be available in 12 cities in India and aims to simplify coordination and logistics. All wedding-related travel will be managed through "cashless pre-generated promo codes" for ease and speed.



Seat/Samsung/SAP(Spain & South Korea)

A three-way collaboration between **Seat**, **Samsung** and **SAP** has developed an in-car fingerprint verified payment system. An app allows you to reserve a parking spot and then pay for the service without ever leaving your car.

Mobike (China)

Mobike, a city bike launched in Shanghai, can now be rented via an app which is available in both English and Chinese. Users scan the QR code on each bike's handle bars in order to release it. For RMB 1, users can use the bike for up to 30 minutes. Unlike other bike rental schemes, the Mobike can be left in any parking area without the need for a docking station.



Effortless

With the proliferation of apps and gadgets, consumers are looking to streamline their experiences by investing in all-in-one systems that get the job done with minimum fuss.



WeChat (China)

WeChat has launched a series of 'small programs' within their own app. Rather than download a raft of programs for various purposes, users can order taxis, make instant payments and navigate the city all via the same app for improved speed and efficiency.



June Intelligent oven (US)

The latest in a long line of 'smart' kitchenware, the **June Intelligent oven** can be remotely controlled by a smartphone app. It asks how and when you would like your meal cooked, updates the app with its progress and then sends notifications when it is cooked to perfection. The addition of a built-in scale on the top of the oven and a unit converter turns it into a one-stop-shop for all cooking needs.



Instant

The increasing expectation of immediacy

Fast isn't good enough anymore. Goods and services are now delivered almost instantly, with 1 hour and sub-1 hour delivery becoming the standard in many large cities.

Instantaneous delivery of products and services is spilling over from the Internet and back onto the high street, as retailers try and claw back lost ground.

- In the US, 24% of customers at Target are making same-day delivery purchases online¹
- 53% of US customers are more likely to make an online purchase if they offer same-day delivery²
- Businesses in the UK are spending £4.9bn less with high street retailers because delivery options are insufficient³

Source:

1 **Packaged Facts** American Consumers in 2020

2 **Coldwell Banker Commercial** <http://www.cbcworldwide.com/news?articleID=4146>

3 **Stuart** On-demand delivery: the untapped goldmine 2016

Instant

Since the advent of ready meals, it has been clear that consumers want food fast. Health trends have prized the fresh and additive-free, and as a result consumers have demanded that their fresh food goes from store to doorstep as quickly as possible. Instant delivery has become so normalised, we now expect the same from our drinks suppliers.



Beer Cargo (Japan)

Craft beer lover Leben Hsieh is bringing craft beer to the masses in Japan, aided by his trusty tricycle. This tricycle has two craft beers on tap (one local and one imported), which Hsieh serves to customers on the go in Taipei.



CornerShop (Mexico)

The **CornerShop** iOS and Google apps allow users in Mexico city to place their grocery order and receive it within 90 minutes. The app lists different supermarkets which specialise in various categories such as meat, fish, baked goods or wine and have all committed to instant delivery.



SwiftDrinks (Australia)

Fed up with the slow delivery of larger alcohol retailers and the high pricing of on-demand delivery companies, the founders of **SwiftDrinks** have created an instant delivery service. Alcohol orders will be delivered within 45 minutes; drivers can be tracked from your phone and contacted directly via call or text.

Instant

Small, pre-packaged single serving sizes achieve two things: they cut waste and they allow customers to get speedy satisfaction.



McDonald's (US)

Starting early next year, **McDonald's** customers in Ohio and Dallas will be able to get their hands on the Mac Jr., a smaller version of their Big Mac which does away with the second burger patty and middle bun. It is designed to be easier to eat on the go



Sriracha2Go (US)

These miniature refillable bottles fit on your keychain for the ultimate instant hit of sriracha. Light and portable, consumers no longer need to wait to enjoy their favourite sauce.



Campari (Global)

Campari has brought their ready-to-drink Negroni to the market in order to give consumers the perfect blend of gin, vermouth and bitters without delay.

Instant

Whether you want your food hot or your drink cold, businesses are working hard to ensure that you do not have to wait to get your fix.



Juan Valdez (Bogota)

Customers at **Juan Valdez** coffee shops can now place their orders through a dedicated app on their smartphone and pay instantly (without the need to queue). The app also keeps track of a loyalty scheme programme with no effort on the part of the customer required.

Gota Ice (Global)

Gota Ice is a pre-filled ice tray with six small compartments ready-filled with water and sealed over to prevent spillage in transit. It's an instant alternative to buying a portable ice maker and cheaper than pre-packaged frozen ice cubes available in supermarkets.



Roccbox (UK)

Roccbox is a portable oven which can be fuelled either by gas or wood (for an authentic taste). It reaches a temperature of 500°C in just 15 minutes and can turn out a crispy Neapolitan pizza in just 90 seconds – faster than any delivery service.

Individual



Demonstrating our uniqueness and individuality

Consumers know that what we purchase and consume says a lot about us. These days, a one-size-fits-all approach doesn't fit and for some, even customised or personalised products fall short. For them, home-crafted wares are becoming the ultimate expression of self.

- Millennials are fast becoming the largest, 'most affluent and influential shoppers on the planet'¹. Almost 60% of Millennials say that brands they buy reflect their style and personality²
- FMCG businesses such as VTT in Finland are looking at how to tailor the taste and texture of their products for individual consumers
- Giving consumers a fuss-free, fast way of putting their own stamp on food and drink is increasingly important – 72% of US consumers expect restaurants to accommodate customisation requests³

Source:

1 **Gen Buy** Kit Yarrow, Jayne O'Donnell

2 **BCG Perspectives** How Millennials are changing the face of marketing forever

3 **Technomic** Flavour Consumer Trend Report

Individual

Allowing consumers to take a step into the production process – no matter how small – gives them the chance to both put their own indelible mark on it and to get it *just* right for them.



CoffeeSock (US)

CoffeeSock have released a do-it-yourself vegan milk kit which lets people whip up their own preservative-free nut milk.



Aldi (UK)

Aldi has developed a range of 50cl 'craft beer-style' wines for the millennial market. The packaging eschews typical grape varietals and cues such as appellation or country, instead taking on the guise of a craft beer. There are no food matching recommendations and screw-caps and corks have been exchanged for crown caps.



De Brabandere (Belgium)

Belgian Brewery **De Brabandere** has released an exclusive range of three beers which customers can mix together to create their own original blends. The beers – a sour Flemish red beer, a sweet and sour red beer and a brown beer infused with cherries – can be blended in the comfort of consumers' homes to their own personal tastes.

Individual

Unusually coloured food, personalised printed drinks and 3D printed foods customised to an individual's tastes are the latest iterations of the personalised food experience.



VTT (Finland)

Finnish company **VTT Technical Research Centre** is developing a vending machine capable of 3D printing food tailored to the user's own palate. 3D printing will enable the machines to create treats layer-by-layer with varying textures and flavours with the individual consumer in mind.

Selfii Techno Art (Malaysia)

This printer can transfer personalised images onto the surface of any coffee, milkshake, food or ice cream. Using 6 different edible inks, the printer can 'print' a photo onto a surface in just 27 seconds.



Ikea (Japan)

To celebrate their 10-year presence in the Japanese market, **Ikea** released a black hot dog (both bun and sausage) that gets its disconcerting colour from edible bamboo charcoal.

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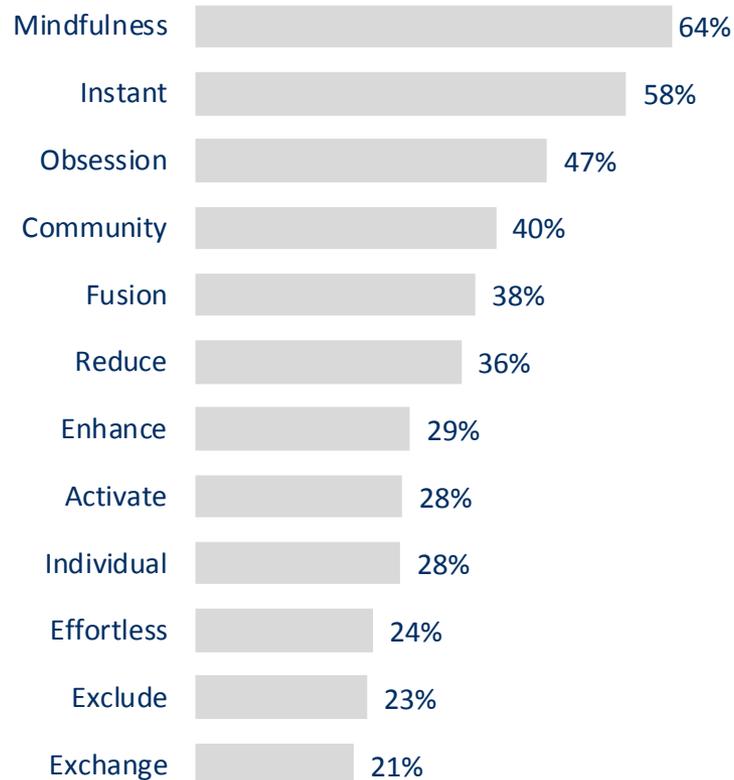
Importance of trends in key markets: UK

 UK consumers value Mindfulness and Instant more than other trends

Importance of trends for consumers: UK (general)

% who find the following trends important

Base = 500 UK regular wine drinkers



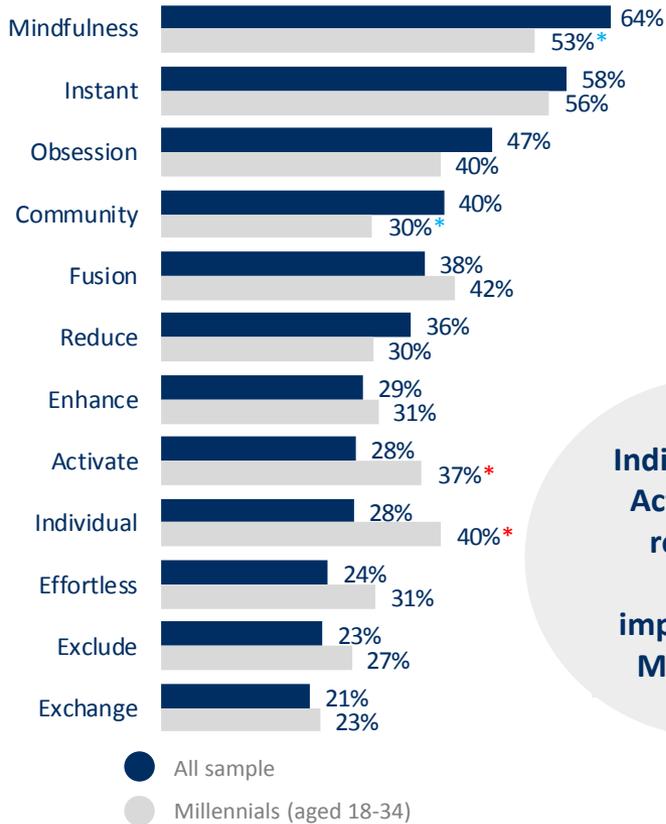
Consumer trends in the UK

 Similar hierarchies observed between age and gender groups

Importance of trends (general): Millennials vs. all UK regular wine drinkers

% who find the following trends important

Base = UK regular wine drinkers (n=500)



Individual and Activate are relatively more important for Millennials

Importance of trends (general): Male vs. Female

% who find the following trends important

Base = UK regular wine drinkers (n=500)



Effortless is relatively more motivating for males than females

* Significantly more important than all sample

* Significantly less important than all sample

Source:

Wine Intelligence, Vinitrac® UK, January 2017, n=500 UK regular wine drinkers

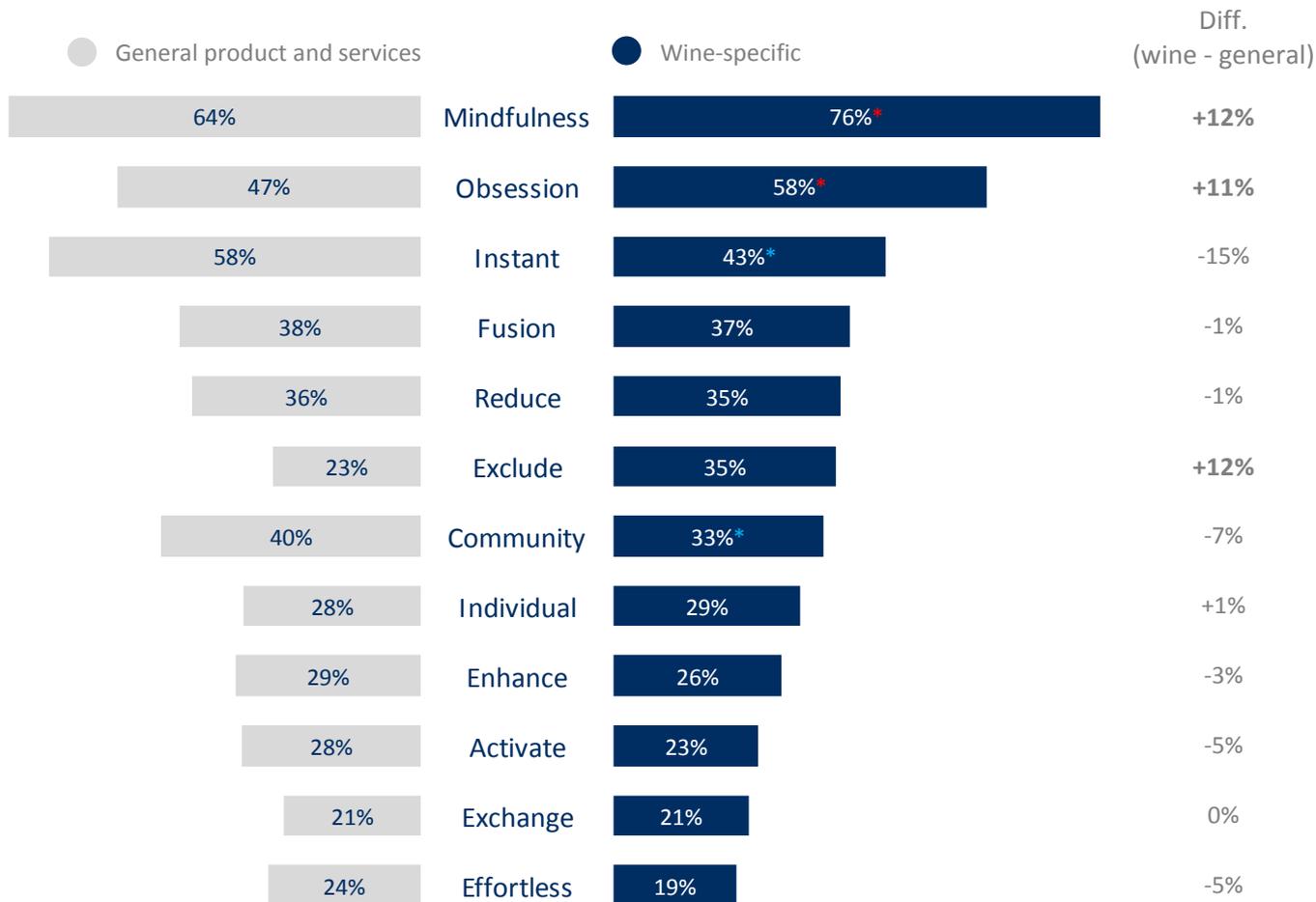
Importance of trends in key markets

🇬🇧 Mindfulness and Obsession are the key trend drivers in the wine category

Importance of trends for consumers: UK (general trends vs. wine-related trends)

% who find the following trends important

Base = 500 UK regular wine drinkers



* Significantly more important than general trends

* Significantly less important than general trends

Source:

Wine Intelligence, Vinitrac® UK, January 2017, n=500 UK regular wine drinkers

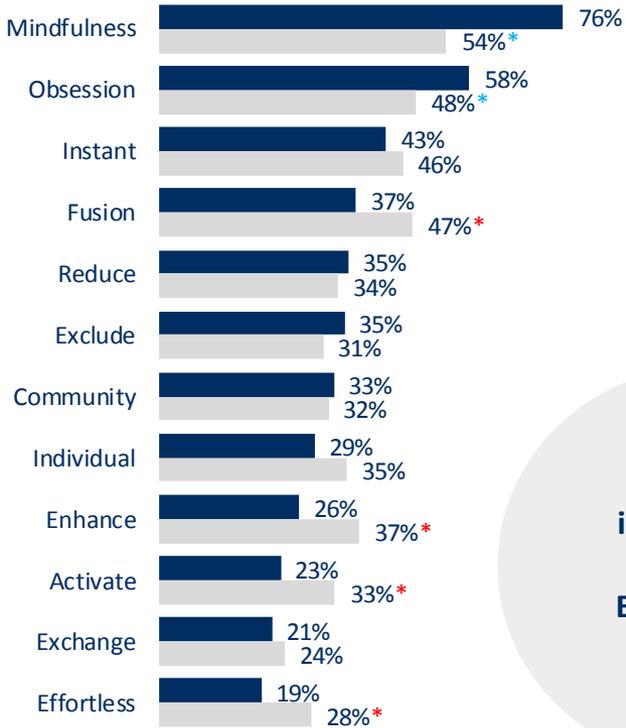
Consumer trends in the UK

Similar trend hierarchies in the wine category between age groups and gender

Importance of trends (wine-related trends): Millennials vs. all UK regular wine drinkers

% who find the following trends important

Base = UK regular wine drinkers (n=500)



- All sample
- Millennials (aged 18-34)

* Significantly more important than all sample

* Significantly less important than all sample

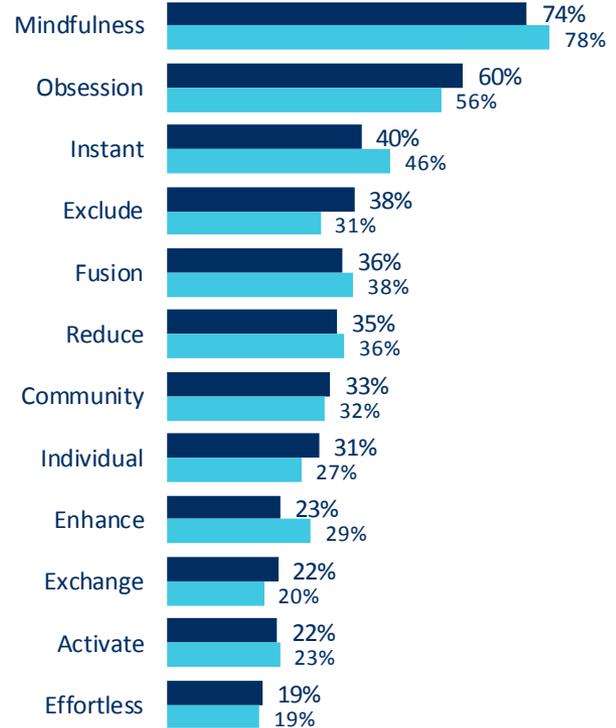
Source:

Wine Intelligence, Vinitrac® UK, January 2017, n=500 UK regular wine drinkers

Importance of trends (wine-related trends): Male vs. Female

% who find the following trends important

Base = UK regular wine drinkers (n=500)



- Male
- Female

No statistically significant difference with all sample

Millennials more interested in Fusion, Enhance and Activate in wine

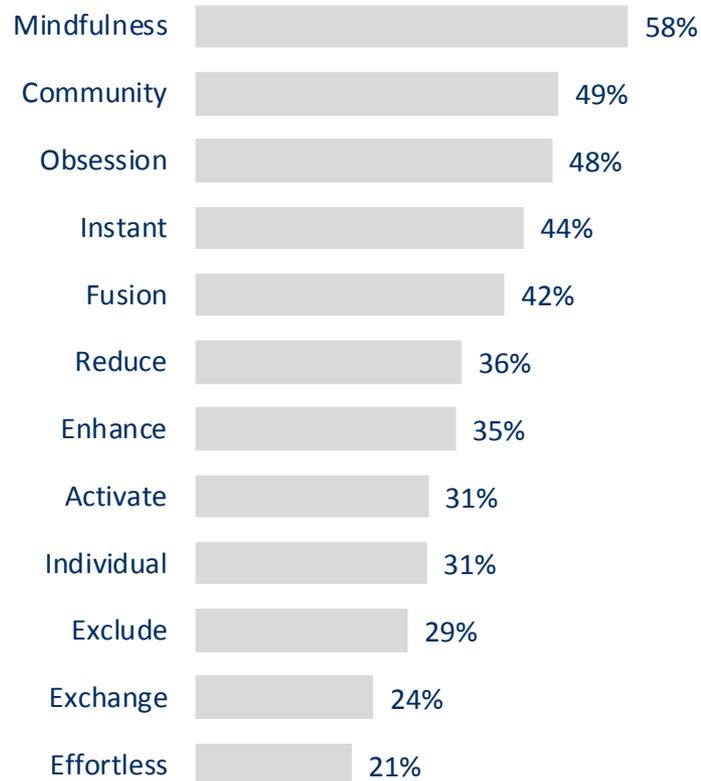
Importance of trends in key markets: USA

 **Mindfulness also comes top of US consumer needs, but Community and Obsession are more important than Instant**

Importance of trends for consumers: USA

% who find the following trends important

Base = 2,009 US regular wine drinkers



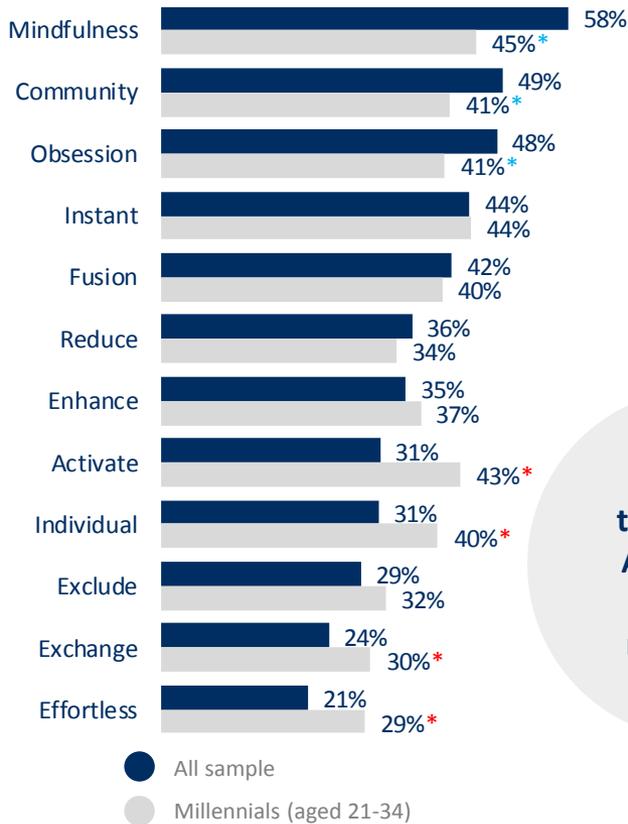
Consumer trends in the US

 More variance between age and gender groups compared with the UK market

Importance of trends: Millennials vs. all US regular wine drinkers

% who find the following trends important

Base = US regular wine drinkers (n=2,009)



Millennials tend to value Activate and Individual more highly

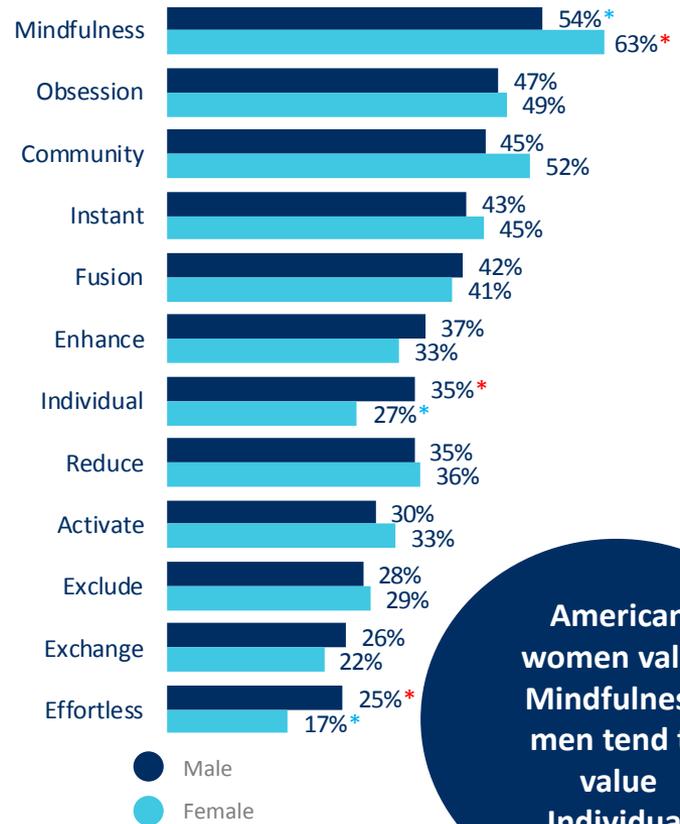
* Significantly more important than all sample

* Significantly less important than all sample

Importance of trends: Male vs. Female

% who find the following trends important

Base = US regular wine drinkers (n=2,009)



American women value Mindfulness; men tend to value Individual



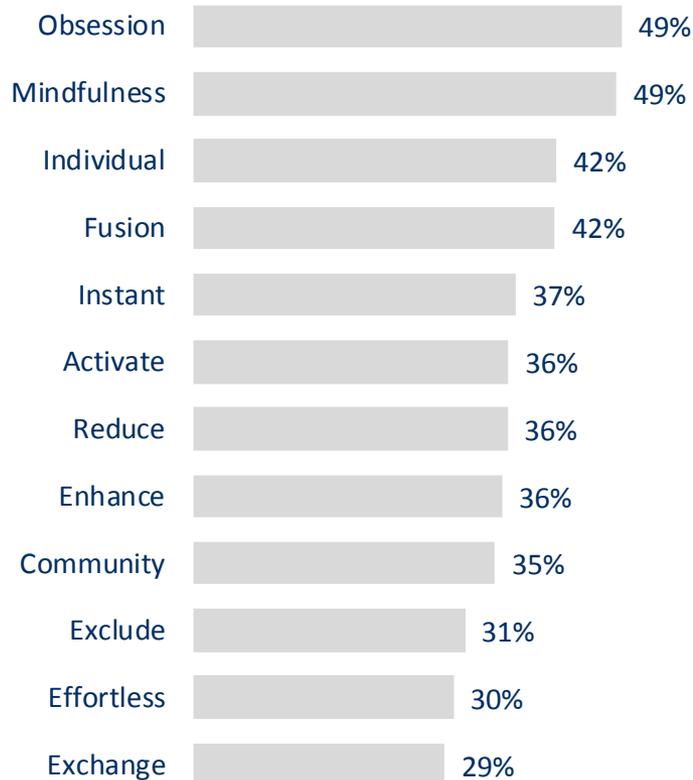
Importance of trends in key markets: China

 Chinese wine consumers also value Mindfulness, though Obsession also plays a strong role in this market

Importance of trends for consumers: China

% who find the following trends important

Base = 1,001 Chinese urban upper-middle class imported wine drinkers



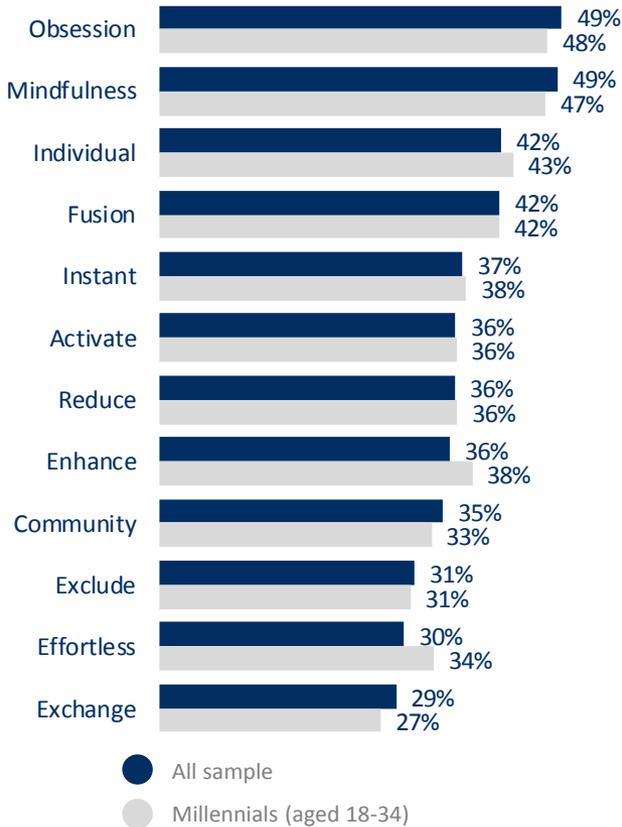
Consumer trends in China

 No real variance by age or gender within Chinese consumer values

Importance of trends: Millennials vs. all Chinese imported wine drinkers

% who find the following trends important

Base = Chinese urban upper-middle class imported wine drinkers (n=1,001)

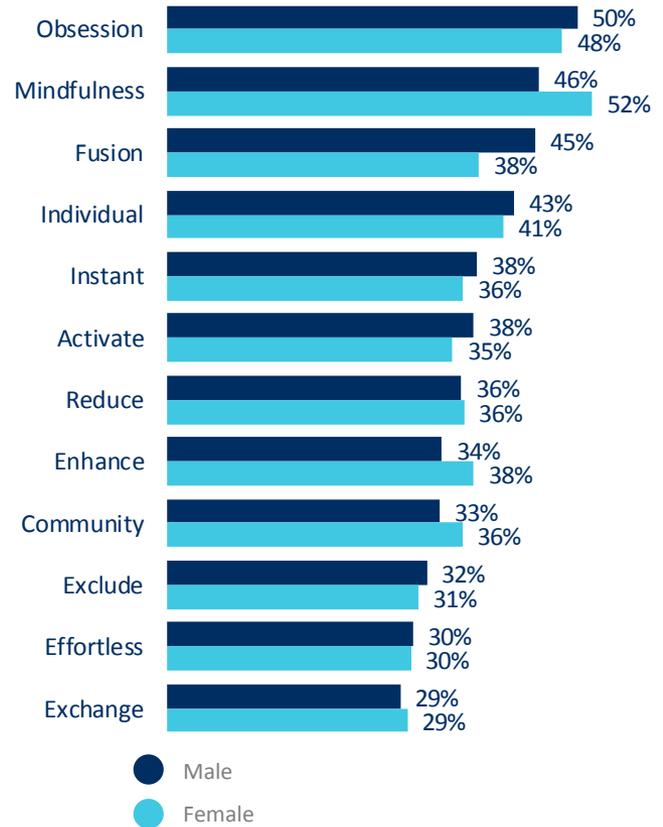


No statistically significant difference with all sample

Importance of trends: Male vs. Female

% who find the following trends important

Base = Chinese urban upper-middle class imported wine drinkers (n=1,001)



No statistically significant difference with all sample

Source:

Wine Intelligence, Vinitrac® China, October 2016, n=1,001 Chinese urban upper-middle class imported wine drinkers

Importance of trends in key markets



Importance of trends for consumers: UK, US and China

Ranking based on % who find the following trends important

Base = 500 UK regular wine drinkers; 2,009 US regular wine drinkers; 1,001 Chinese urban upper-middle class imported wine drinkers

Ranking	UK	US	China	Overall
Mindfulness	1	1	2	1
Obsession	3	3	1	2
Instant	2	4	5	4
Fusion	5	5	4	5
Community	4	2	9	5
Reduce	6	6	7	6
Individual	9	9	3	7
Activate	8	8	6	7
Enhance	7	7	8	7
Exclude	11	10	10	10
Effortless	10	12	11	11
Exchange	12	11	12	12

Source:

Wine Intelligence, Vinitrac® UK, January 2017, n=500 UK regular wine drinkers; Vinitrac® US, October 2016, n=2,009 US regular wine drinkers; Vinitrac® China, October 2016, n=1,001 Chinese urban upper-middle class imported wine drinkers

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Research methodology - UK

Vinitrac®

- The data for this survey was collected in the UK in January 2017
- Data was gathered via Wine Intelligence's Vinitrac® online survey:
 - 500 UK regular wine drinkers (January 2017)
- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-premise or in the on-premise
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The data is representative of UK regular wine drinkers in terms of age and gender
- The distribution of the sample is shown on the right:

UK		Jan'2017 n=500
Gender	Male	50%
	Female	50%
	Total	100%
Age	18-24	7%
	25-34	17%
	35-44	19%
	45-54	18%
	55-64	24%
	65 and over	15%
	Total	100%

Source: Wine Intelligence, Vinitrac® UK, Jan'17 (n=500)

Research methodology - US

Vinitrac®

- The data for this survey was collected in US in October 2016
- Data was gathered via Wine Intelligence's Vinitrac® online survey:
 - 2,009 US regular wine drinkers (October 2016)
- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-premise or in the on-premise
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The data is representative of US regular wine drinkers in terms of age, gender and region
- The distribution of the sample is shown on the right:

	US	Oct'2016 n=2,009
Gender	Male	48%
	Female	52%
	Total	100%
Age	21-24	8%
	25-34	22%
	35-44	14%
	45-54	18%
	55-64	16%
	65 and over	22%
	Total	100%
Region	New England	6%
	Middle Atlantic	16%
	East North Central	14%
	West North Central	6%
	South Atlantic	19%
	East South Central	4%
	West South Central	9%
	Mountain	7%
	Pacific	20%

Source: Wine Intelligence, Vinitrac® US, Oct'16 (n=2,009)

Research methodology - China

Vinitrac®

- Vinitrac® data for this study were collected in October 2016
- Data were gathered via Wine Intelligence's Vinitrac® online survey of:
 - 1,001 Chinese urban upper-middle class drinkers of imported wine
- Respondents were screened to ensure they met the following requirements:
 - 18-54 years old
 - Residents of Beijing, Guangzhou, Shanghai, Wuhan, Shenyang, Chengdu, Hangzhou, Shenzhen, Chongqing, Changsha, Zhengzhou and Guiyang
 - Urban upper-middle class:
 - Personal income of at least 6,000 RMB before tax per month in tier 1 cities (Beijing, Guangzhou, Shanghai, Hangzhou and Shenzhen)
 - Personal income of at least 5,000 RMB before tax per month in tier 2/3 cities (Wuhan, Shenyang, Chengdu, Chongqing, Changsha, Zhengzhou Guiyang)
 - Drink imported grape-based wine at least twice a year
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The survey was quota-based and post-weighted to be representative of Chinese urban upper-middle class imported wine drinkers in terms of age, gender, geography, and income
- The distribution of the sample is shown on the right:

Vinitrac® China Methodology		
	<i>n</i> =	1,001
Gender	Male	51%
	Female	49%
	<i>Total</i>	100%
Age	18-29	37%
	30-39	30%
	40-54	33%
	<i>Total</i>	100%
City	Beijing	13%
	Guangzhou	14%
	Shanghai	21%
	Wuhan	6%
	Chengdu	11%
	Shenyang	5%
	Hangzhou	4%
	Shenzhen	4%
	Chongqing	15%
	Changsha	3%
	Zhengzhou	3%
	Guiyang	1%
	<i>Total</i>	100%
Personal monthly income before tax	Below 7,000 RMB	21%
	7,000-9,999 RMB	29%
	10,000+ RMB	50%
	<i>Total</i>	100%

Source: Wine Intelligence, Vinitrac® China, Oct'16, n=1,001 Chinese urban upper-middle class imported wine drinkers aged 18-54

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Carlsberg
Coco Libre
CoffeeSock
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