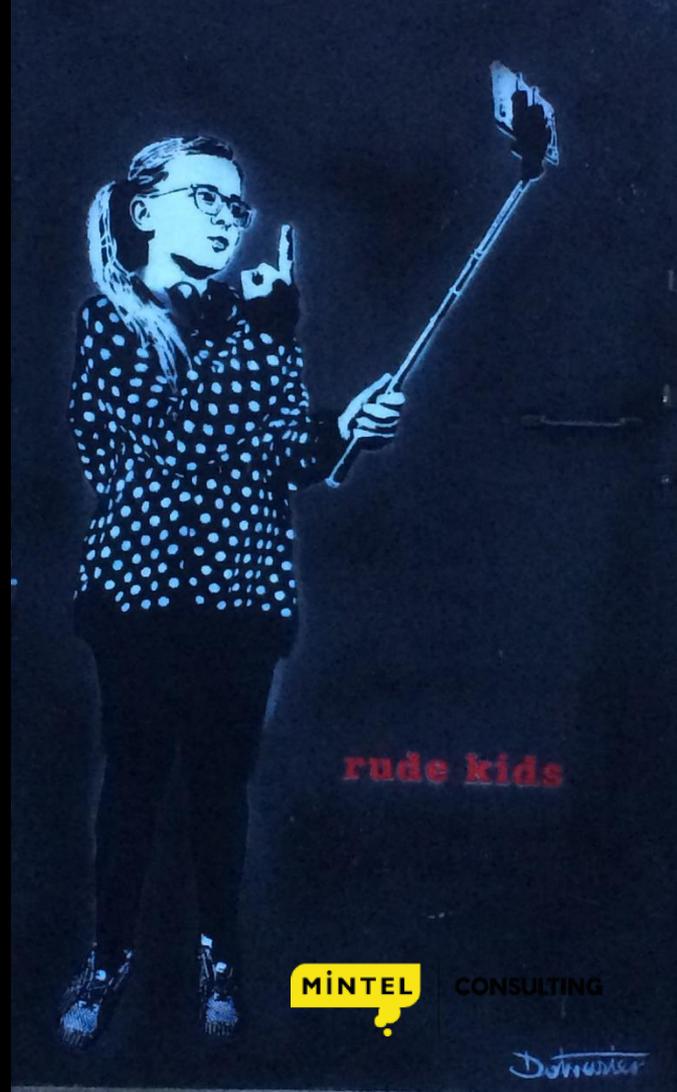


Tomorrow People

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rude kids



CONSULTING

Dobson

Today's Agenda

We'll explore five **Drivers** to quantify the world of 2030, highlight **consumer needs** that will grow, showcase early signal innovations and recommend marketing approaches.

DEMOGRAPHICS



LIFESTYLES



HEALTH



RESOURCES



TECHNOLOGY



Demographics

Key points:

- ❑ By 2030, the world will have a **much older population profile** as Baby Boomers age and birth rates fall.



- ❑ Ageing demands **more migration** from younger regions, bring new tastes, inspirations, political and religious demands.



Our population is ageing



Ageing drives demand for **age-focused nutrition** for longevity and cognitive performance, **social connections** and **technology** for independence.



35%

Of people will be under 25 by 2050, down from 40% now.

30% +

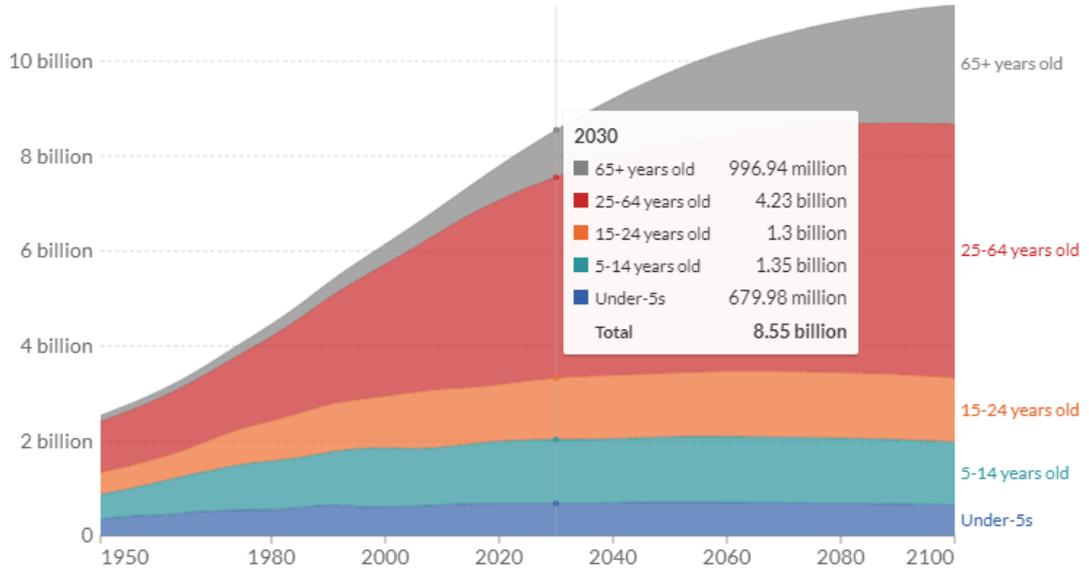
Of Finns will be over 65 in 2050.

Source: [WHO](#); [UN Population data projections](#)

Population by broad age group projected to 2100, World, 1950 to 2100

Total population by broad age group, with historical estimates from 1950 to 2015 and projections to 2100 based on the UN's medium population scenario.

[Change country](#) Relative



Source: UN World Population Prospects (2017)

OurWorldInData.org/world-population-growth • CC BY

Innovations connecting seniors

connection

Japan: 7-Eleven developed **RemoPick glasses** that enable people with failing eyesight to be remotely guided around the store by staff and read enlarged product labels onscreen.



South Korea: Korea Testing Laboratory opened a 'Silver Café' in Jinju staffed by over-60s who have completed a barista course.



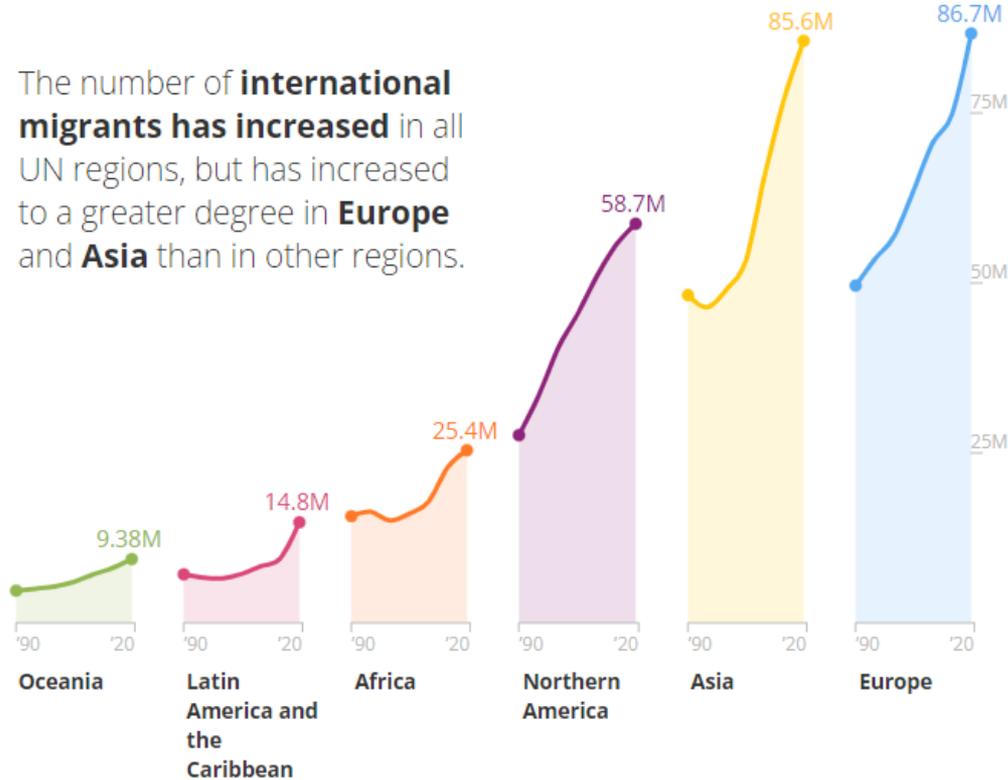
Finland and Sweden: Gubbe matches seniors with young employees for shopping, cleaning and chatting.



Ageing grows the Old Age Dependency Ratio



The number of **international migrants has increased** in all UN regions, but has increased to a greater degree in **Europe** and **Asia** than in other regions.



Ageing population profiles reduce proportion of young workers able to support these societies necessitating new migrants.

47% +

Finland's old age dependency ratio by 2050.

UN DESA 2021.

Migration brings new workers and new markets



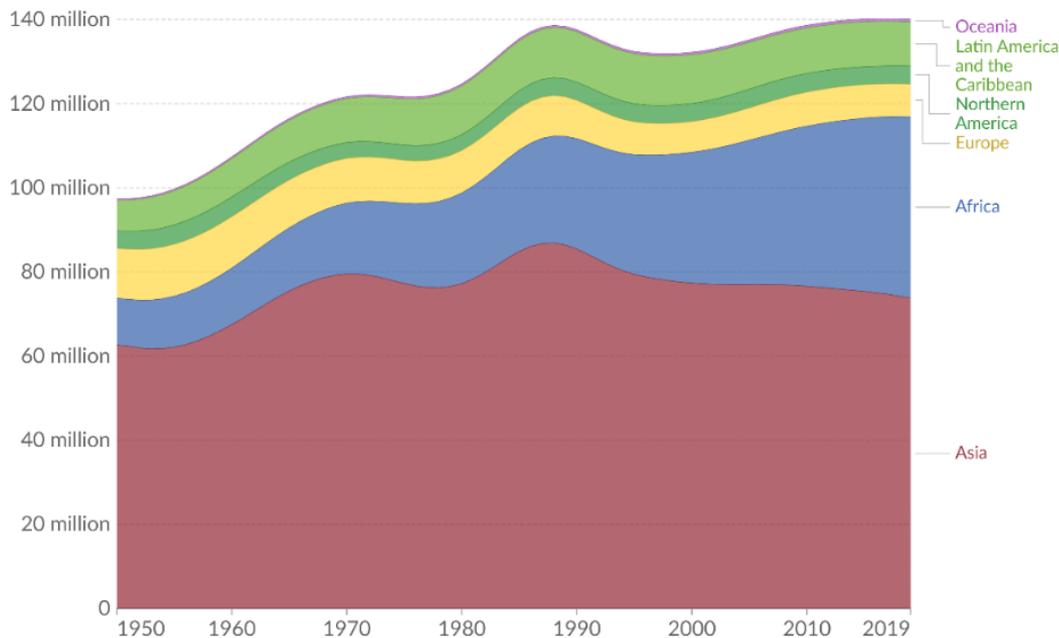
The world's older regions are receiving an influx of migrants from younger, more religious, African, Middle Eastern and Southeast Asian regions, requiring everyone from governments to employers and advertisers to become more inclusive.

73%

Increase in Muslim population 2010-50.

Source: [UN International Migrants Report 2020](#); [WHO](#); [Pew Research Centre](#)

Annual number of births by world region



Source: United Nations - Population Division (2019 Revision)

OurWorldInData.org/fertility-rate • CC BY



Inclusive campaigns



UK: Sports Direct's podcast *Fast Enough: Ramadan Running* encourages Muslims to exercise safely during Ramadan, hosted by taekwondo athlete Lutalo Muhammad.



US: Shef is a food delivery app to help immigrant chefs sell their home-cooked food.

Best-selling chefs this week!



Finland: Cloetta relaunched its classic Aakkoset sweets in multiple languages and alphabets to reflect modern diversity.



Driver



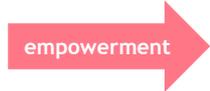
Lifestyles

Key points:

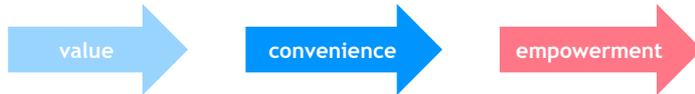
- ❑ More single homes and more single parents pressure budgets, demanding practical support and social outreach.



- ❑ Under 30s living with parents are in-home digital and sustainability influencers.



- ❑ Urbanisation grows sharing economies and micromobility.



- ❑ Homeworking resets routines and roles.



Ageing grows one person households

'Older' countries have highest proportion of singles, demanding E-commerce delivery, digital support and social contact services.

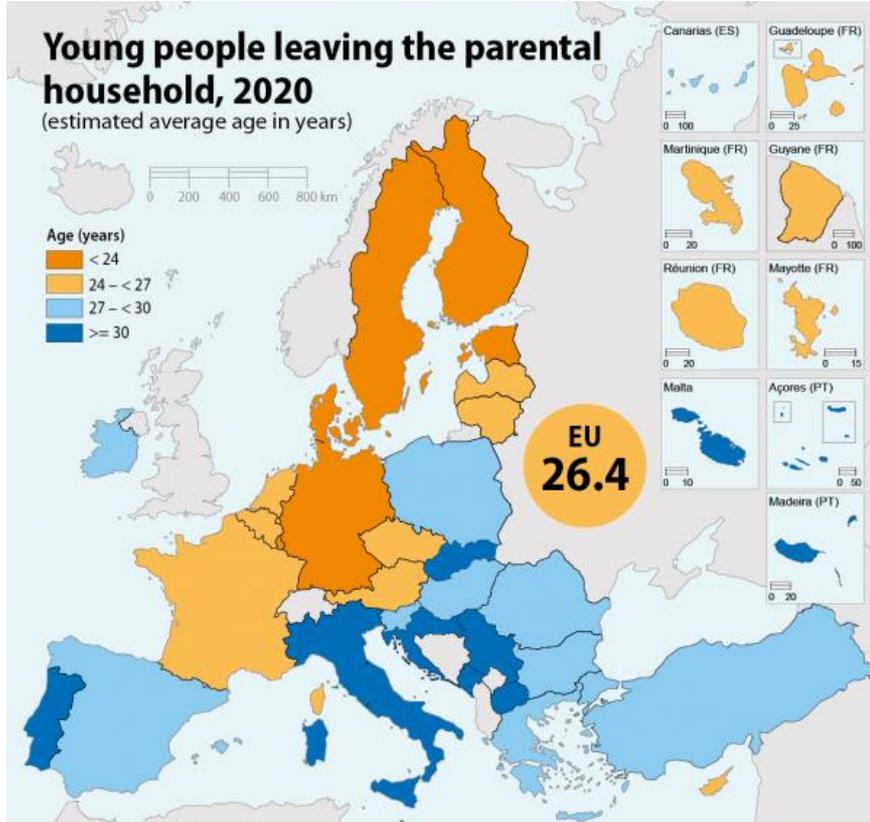
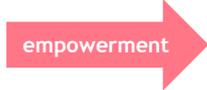
43% +

Of Finland's homes are already single occupancy.

Source: [Our World in Data](#)



More multi-generational homes



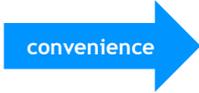
Young people's digital aptitude and passion for sustainability will influence the whole family's habits.

24 +

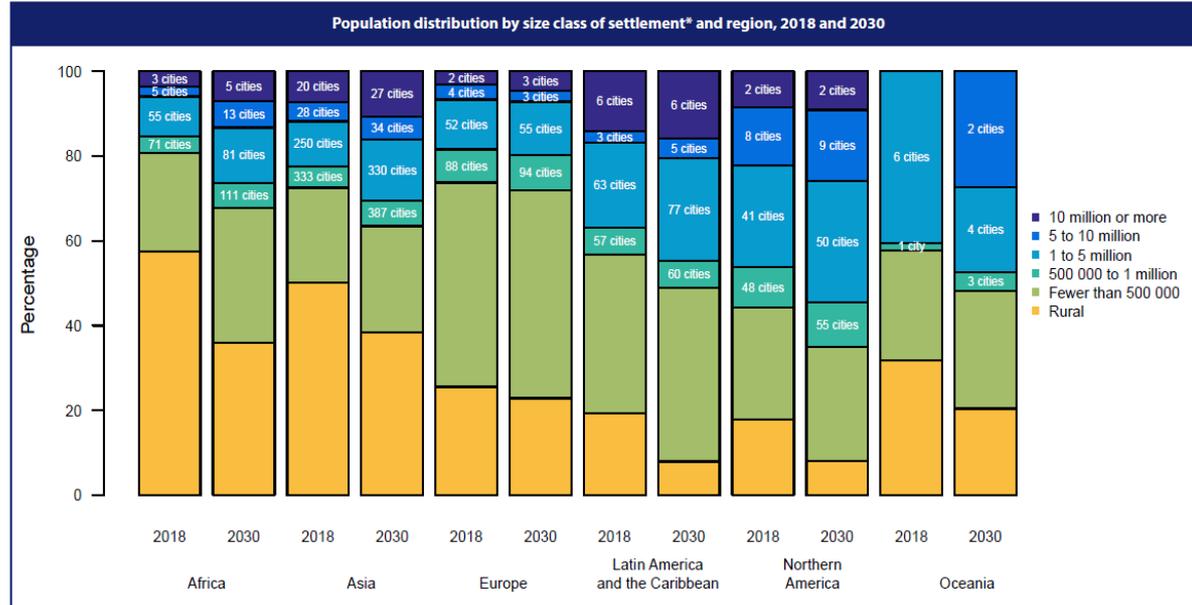
Average age at which Finns leave parental nest.

Note: Germany: Provisional and low reliability data.
Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat
Cartography: Eurostat - IMAGE, 08/2021

Growing urbanisation to 2030



Growing urbanisation exerts time and space pressures on people's homes.



*The population of cities with fewer than 500,000 inhabitants is estimated by taking the difference between the total urban population and the population in cities with 500,000 inhabitants or more. The number of cities with fewer than 500,000 inhabitants is not estimated.

0.5% +

Annual urban growth rate in Finland, 2030-35 against a global 1.5%.

Urban escapism

stimulation

Hungary: Hello Wood's 12m² Kabinka comprises a kitchen, a bathroom, couch and stove, is coolable and heatable and comes as a flat-pack kit that consumers can assemble themselves.



Seoul: Urban space pressures have created '**Bang**' culture, where private space is prized in leisure and restaurant offerings.



Finland: Pieni Lelukauppa is opening experience-led toy stores in Helsinki and Tampere, decorated with fairytale themes.



Urbanisation grows sharing economies



Space pressed, highly connected consumers will seek to access rather than own many goods and services.

95%

Of the time a car is unused.

80%

Of things in the home are used less than once a month.

3/4

Of Millennials would rather pay for a service or experience than own it.



Sharing economy concepts



Bag4Days hires out suitcases with the claim "don't buy, rent."

Finland, Norway and Sweden: Hardware and home improvement retailer **Clas Ohlson** has launched a tool rental service.

The Bike Club rents out children's bikes on a monthly basis, so you can exchange the bike for a larger one at any time and the bike goes back into the system to be used by another child.



2030: Micromobility vs car ownership



Vehicle ownership - and in car consumption and purchasing - will diminish, due to time and space pressures and utilisation factors.

60%

Of Passenger miles travelled are trips of less than 5 miles in length.

-70%

Decline in car ownership by 2050.



Homeworking will grow

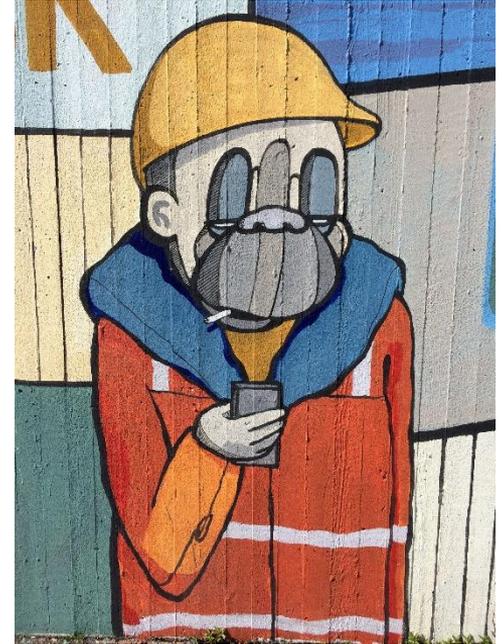
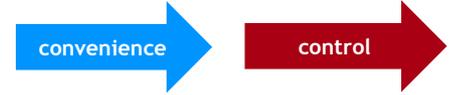
The pandemic made homeworking and home studying a realistic future, changing work/life balance, commutes and routines.

40%

Of the workforce in rich countries do jobs that can realistically be completed from home.

8-12% +

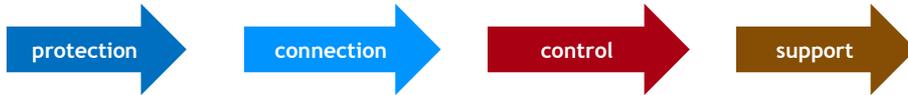
Annual change in share of persons in Finland usually working from home.



Health

Key points:

- ❑ By 2030, people will be **physically bigger and older**, seeking **guidance** on weight and vice reduction and healthier lives.
- ❑ **Mental wellbeing mainstreams** demanding **social contact** and **optimism**.



- ❑ **Environmental threats** of heat and pollution demand **protection** and **action**.

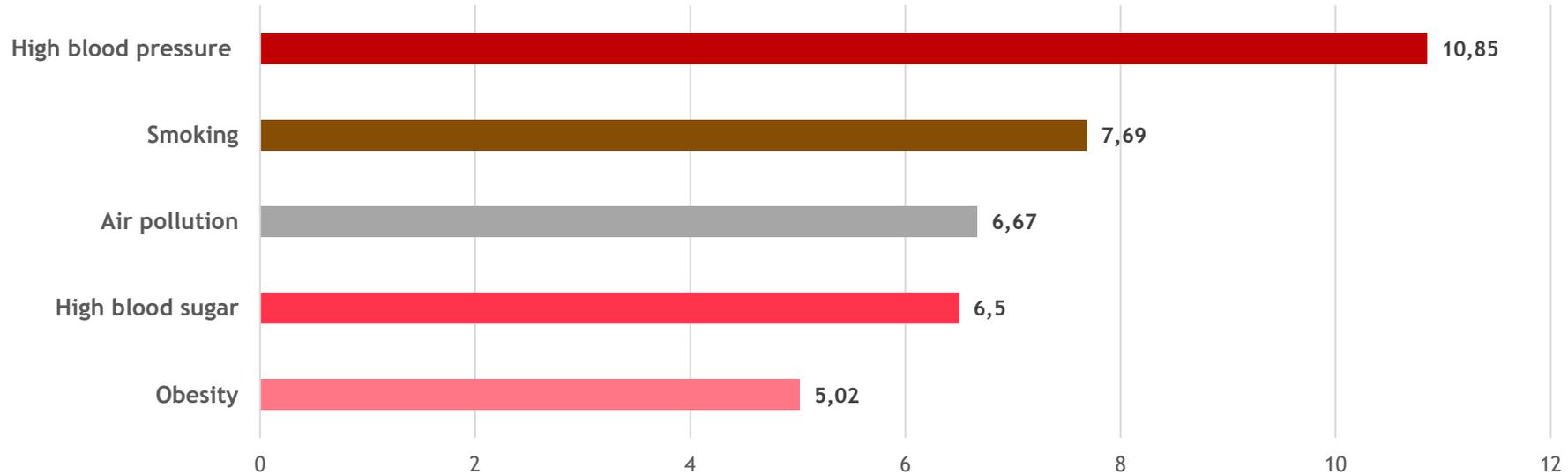


Consumers look to counter the killers



Healthier diets, vice reduction and pollution protection will be high on the agenda.

Death by risk factor worldwide, 2019 (millions)



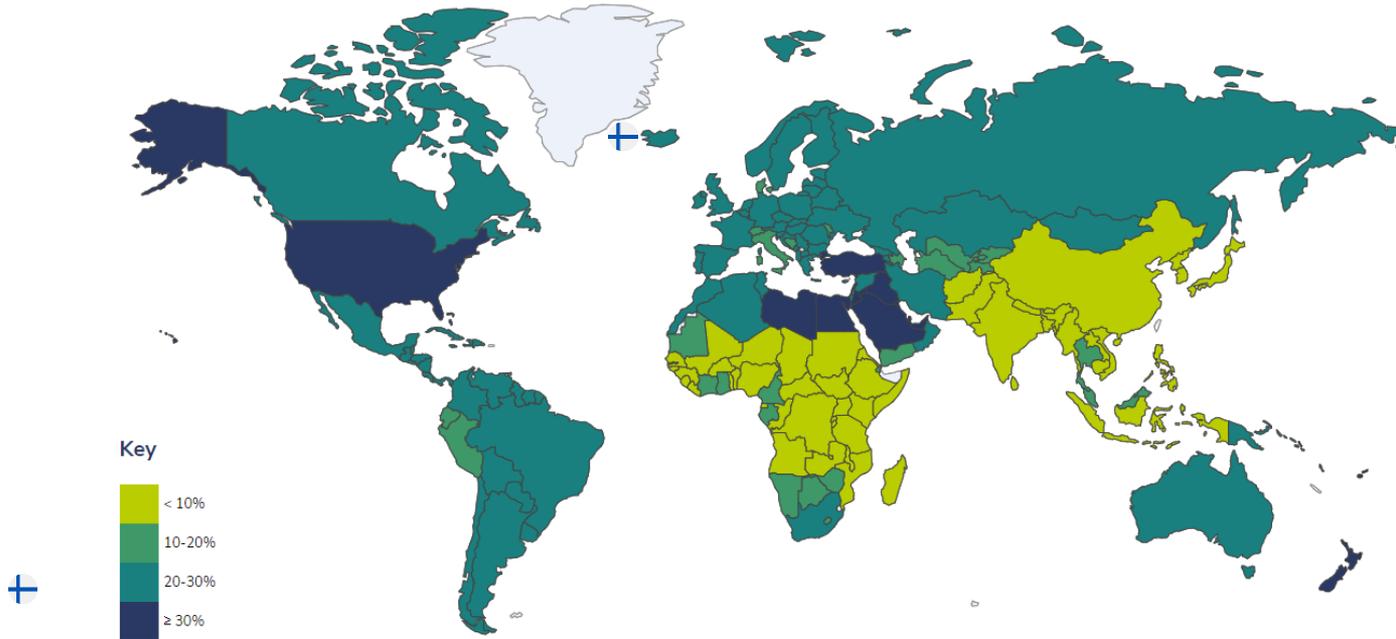
Source: [WHO](#)

Consumers seek guidance on diet and exercise



Estimates of prevalence of obesity in adults

Obesity BMI ≥ 30 kg/m². All adults



Source: Global Health Observatory Data Repository <https://apps.who.int/gho/data/node.main.A900A?lang=en>



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Healthy innovations



Finland: Myllyn Paras has launched a protein-rich porridge mix using broad beans and featuring the Finnish Heart Symbol and home-grown flour.



Finland: Sober Furious was created by the Darravapaa community Club Kaiku as an alcohol-free drink and mocktail experience.



Finland: Silmu single-person, noise-cancelling pods offer stress-relieving micro breaks for workplaces and public spaces.



Countering social isolation and depression

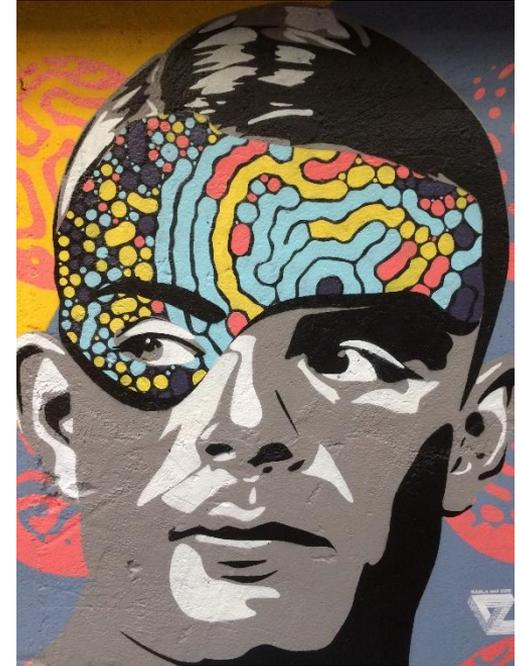
Ageing, single households and digital lifestyles all contribute to a sense of social isolation, with singles projected to grow.

39% +

Of Finnish over 75s self-report loneliness.

5%

The global average prevalence of depression, up **beyond 20%** in some pandemic markets.



Campaigns for social interaction

connection

Denmark: Rema 1000's 'sharing economy app'
Vigo delivers products, discounts, emission reductions *and* social contact.



Now you can order goods from the computer, on shop.rema1000.dk

- Få hjælp til indkøb af din nabo
- Ingen minimumsbetøb
- Få timers levering, alle dage imellem 10 og 19
- Levering i hele landet

Download on the **App Store** or **Google Play**

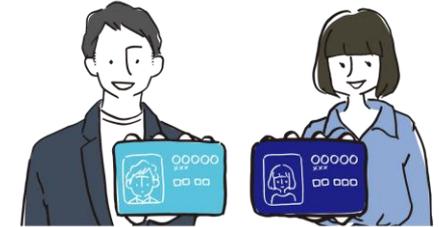
- Det er vigtigt for os, at du føler dig velinformet og ordentlig behandlet. Klik på linket nedenfor, for at se vores Persondatapolitik, Handelsbetingelser, Cookiepolitik og Husregler. Læs mere her: shop.rema1000.dk/vigo

- Vi beskytter dine personoplysninger og holder dem sikre, derfor opdaterer vi vores Persondatapolitik 4.25 maj 2018, med dig i tankerne. Læs mere her.

Japan: Trenders' incentivised 'President's Treat Vending Machine' sees employees who synchronise buying rewarded by the firm's president paying for their drinks.



2人で社員証を
タッチすると
飲み物がタダに!



More consumers suffering from heat

protection

Consumers will be looking for company actions to reduce - and product protect against - climate change and heat.

150,000

People died in France as a direct result from heatwaves in 2019, according to the health ministry.

+4.1

Increased likelihood of extreme heat events every 10 years under a 1.5C warming scenario.



Resources

Key points:

- ❑ **2030: climate change a tangible reality** for more and more people, impacting on health and prices to demand self-preservation products and services with an ROI.



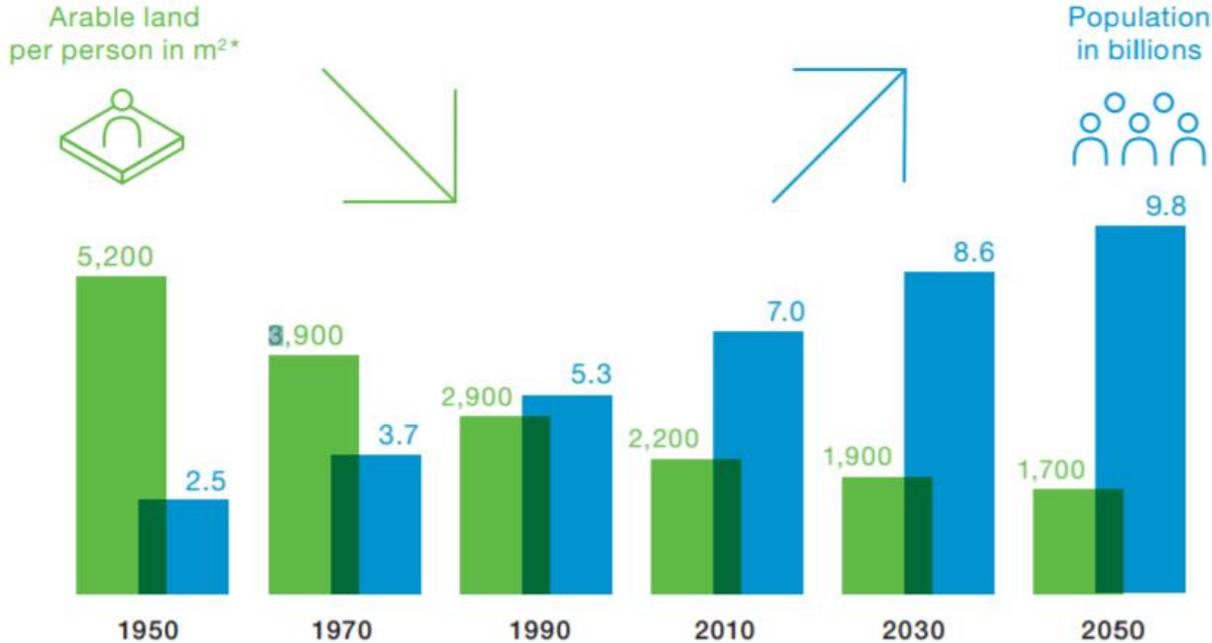
- ❑ Consumers learn about realities of where emissions come from, they seek **information and transparency** to make **positive and impactful choices**.



Consumers question resource use



Activism raises awareness that we are now living in an Anthropocene epoch, where consumerism impacts on resources.



2

Planets worth of resources needed to produce our goods and absorb our waste by 2030.

+70%

More food needed to feed 10bn people by 2050.

* Rounded figures, including permanent crops

Source: UN 2017, FAOSTAT 2017, FAO 2012, own calculations

Ukraine war a preview of pressures



- ❑ Current supply chain shortages are a foretaste of those to come from more frequent droughts that will reduce yields.
- ❑ Companies will seek resilience and independence through greater levels of electrification and renewable energy.

30%

Predicted increase in drought events 2000-30.

x3

Of German annual additions of onshore wind and solar capacity to bring forward total sourcing of electricity from renewable sources by 2035.



Innovations in greater responsibility



Sweden: Vattenfall and St1 plan to produce synthetic kerosene plane fuel by 2029, using green hydrogen and carbon dioxide captured from the paper industry.

Finland: VTT coffee made by brewing plant-based cell cultures, with regulatory approval sought by 2025.

Finland: K-Group's Tuotteiden jäljillä product-tracking website shows consumers how its bananas, T-shirts, canned tuna, roses and timber are grown, processed and transported.



Emission issue awareness grows

empowerment

Self-expression

connection

Activism will raise focus on **Energy** (73% of emissions) and other processes in consumer products.

31%

Making things
(cement, steel, plastic)

27%

Plugging in
(Electricity)

19%

Growing things
(plants, animals)

16%

Getting around
(planes, trucks, cargo ships)

7%

Keeping warm and cool
(heating, cooling, refrigeration)

How not to communicate in campaigns

Data without context harms the credibility of companies and the entire movement around responsibility.

2021: Mars Wrigley's Maltersers chocolate box has reduced its use of plastic by the equivalent of 18 Tyrannosaurus Rexes!



2020: Burger King claims its lemongrass fed cows release 33% less methane, ignoring the emissions from their first 15 months, or land use and feed. This 'low methane' beef was only sold at five stores globally.



How to communicate responsibility

1940s American supersalesman Elmer Wheeler:
“Don’t sell the sausage - sell the sizzle!”

Appeal to “Associative system” (gut feelings) and “Social norms”:

68%

“Doing things that benefit the environment makes me feel happy”.

38%

“I want to show other people if I’m doing good for the environment”



How to communicate: Backmarket



Backmarket’s campaigns appeals to sustainably-minded consumers’ frugality and individuality and convinces them through impact data that uses quantities people can comprehend and relate to.



2021: Its *Freedom* campaign extols “democratically priced devices” and being “different” by not lining up *en masse* for Apple and Samsung.

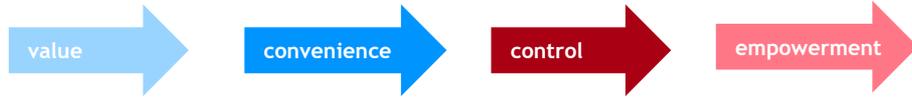


2022: a *Hack Market* guerilla campaign, using Airdrop to convince people in Apple stores buy a refurbished ‘iPhone you love without the carbon footprint you hate’ instead.

Technology

Key points:

- More time on mobile apps, wearables and IoT devices grows **instant access, quantification and gratification** mindsets.



- Gamification brings **playfulness** to platforms and products.



- Innovation makes **remote care and clean energy** reliable and affordable.



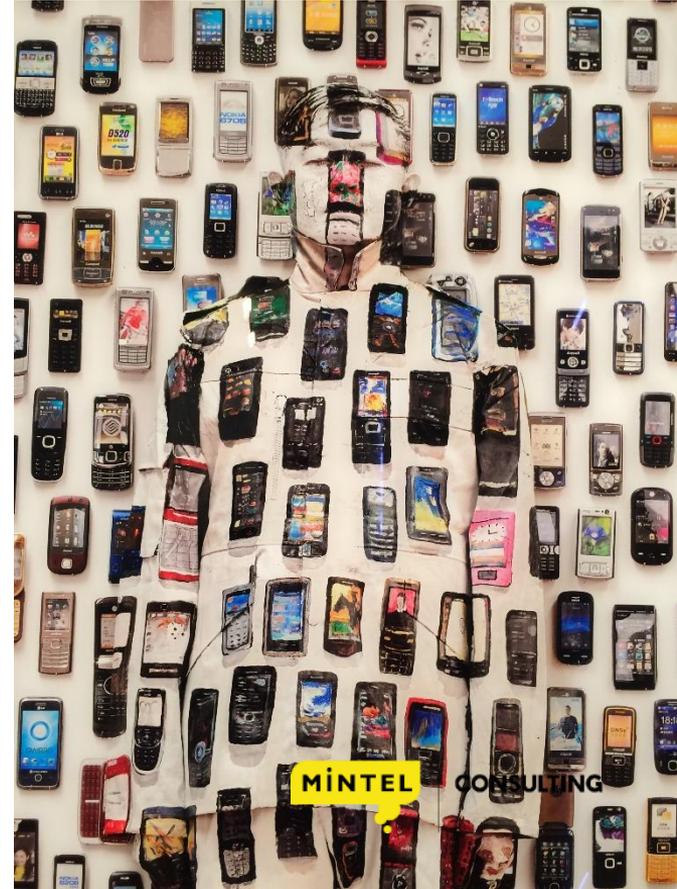
2021: Internet penetration and time grows

+30%

Increase in average daily internet usage
across Top 10 markets in against 2019 to

4 hours 48 minutes

A day.



E-commerce grows, but physical dominant

\$5trn

Worldwide E-commerce sales in 2022.

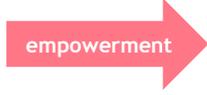
20%

Of retail sales.

Source: [eMarketer](#)



Growth in analysis and monitoring culture



1.4bn

Smart home device shipments by 2025
with a five-year CAGR of 12.2%.

631mn

Wearable device shipments by 2024
with a four-year CAGR of 12.4%.



Innovations in analysis culture



Finland: MAIJU (Motor Assessment of Infants with a Jumpsuit) was developed by Helsinki Children's Hospital in partnership and **Movesense**, to measure movement for early clinical diagnostics.

Sweden: Electrolux's GRO modular kitchen range uses AI and smart technology to encourage more sustainable and healthy cooking.

Italy: Bologna's Smart Citizen Wallet app will reward good behaviour including following traffic rules, optimising energy consumption and partaking in waste collection.



The *So What?* For communications

- ❑ An ageing society craves convenience and independence and a wider interest in healthier, more social lifestyles.
- ❑ Migrants create new youth and family markets and offer cultural inspiration in return for inclusion and respect.
- ❑ Target under 30s living with parents as in-home influencers for digital and sustainable initiatives.
- ❑ Offer urbanites convenience, out-of-home experiences and communal alternatives to consumption.
- ❑ Climate ravaged, resource-deprived consumers seek responsible and reliable products and services with an ROI.
- ❑ More connected consumers seek convenience, social connection, self-analysis and playfulness.

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Senior Trends Consultant

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