

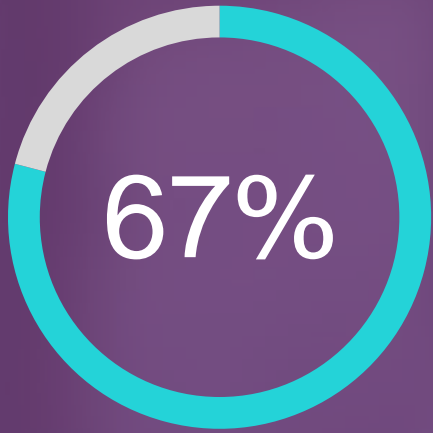


I want to use my time to be as productive and sociable as possible, flowing from one thing to the next - and helped, not hindered, by tech...

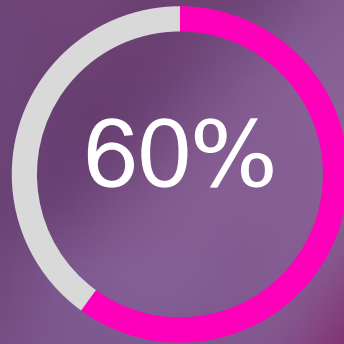
Blurred dayparts **social shopping**
Supported & **On-the-go** Living in the cloud
enabled by tech 'decluttering' **D2C delivery**
Invisible and maximising **Eat & drink**
seamless solutions time
Changing work 'gig economy' **anywhere**
and home life Automated shopping
beacons and sensors fluid routines
Smart environments



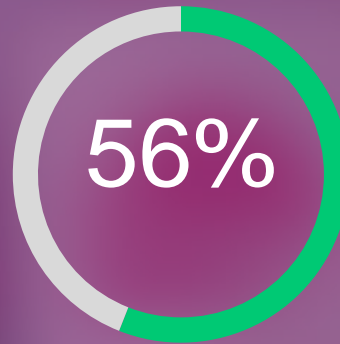
“More and more, I am looking for ways to simplify my life”



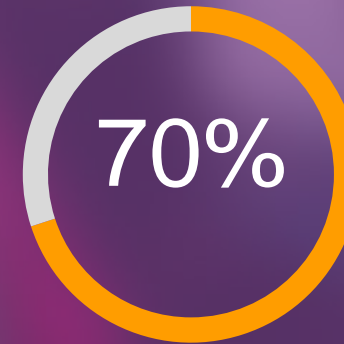
Global
~0% since 2014



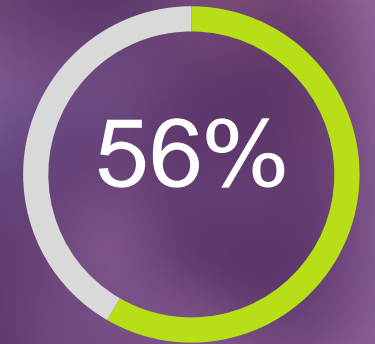
US



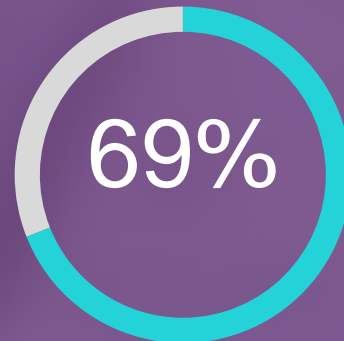
UK



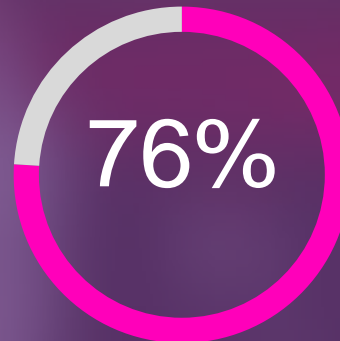
Mexico



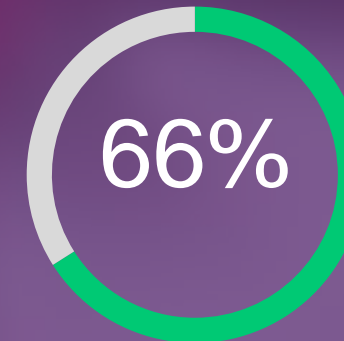
Germany



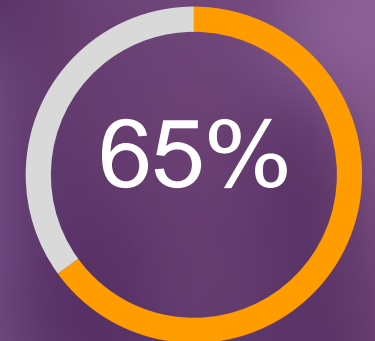
China



Malaysia



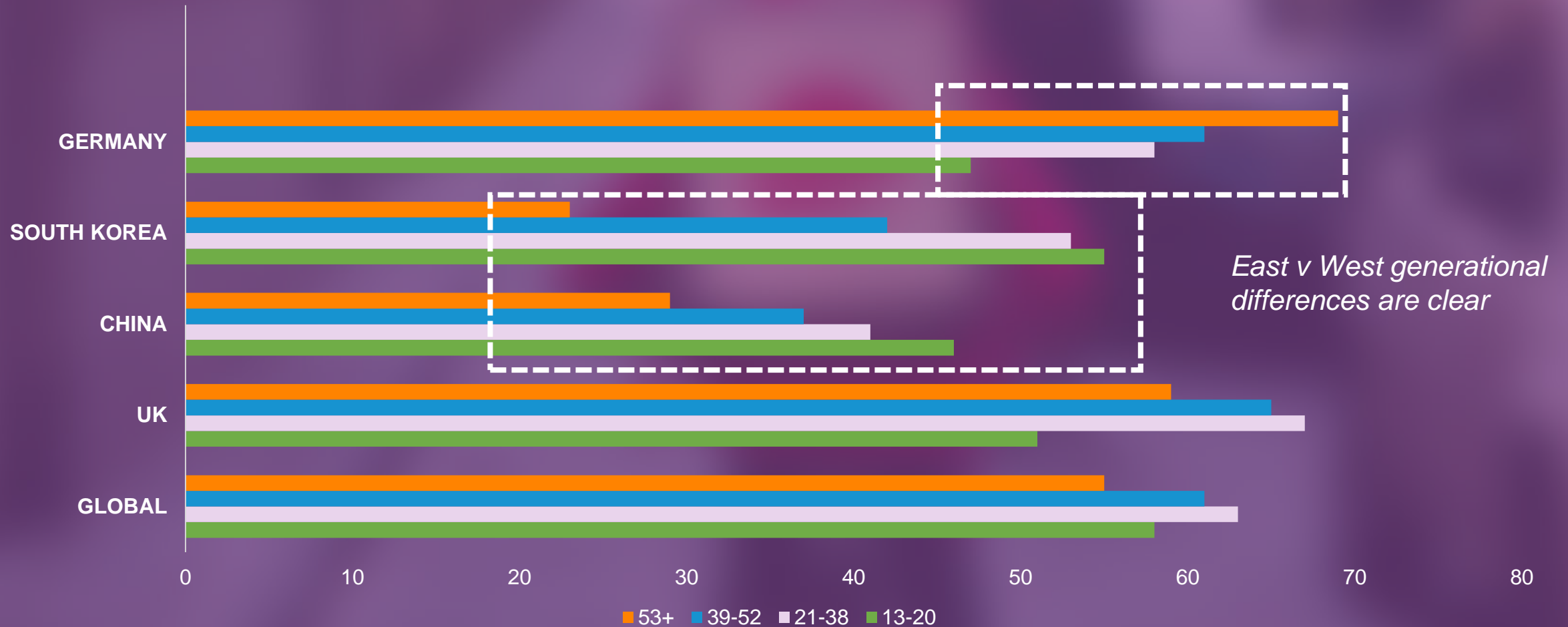
Japan



South Korea

The further East you travel, the greater the desire for simplifying life's complexity...

“It is important for me to sometimes disconnect from online and mobile communications”





Growing digital connectivity

This macro driver enables and drives Fuller Lives. The youngest generations have never experienced a life devoid of data and digital lifestyle solutions

35% of global consumers actively “wish there were more technology tools and apps that would manage their life”, up 5% from 2015, while 58% say they are on the internet constantly throughout the day (vs 49% in 2015).



Changing lifestages and household structures

Changing career trajectories, household structures, and gender roles all point towards flexible lifestyles that value productivity and sociability above the traditional markers of success such as home ownership, marriage and children

By 2020, the number of single-person households is estimated to rise to 415 million globally, 18% more than in 2016. 1



Economic empowerment of women

Urbanisation brings with it opportunities to maximise living; more people seeking creativity and collaboration, in dense and digitalised spaces

By 2050, two-thirds of the world's population will live in cities, compared with just over half today.



Rapid urbanisation

WHAT'S DRIVING THE TREND?: DRIVERS



Growing digital connectivity

75.4bn different connected devices worldwide expected by 2025.¹



Changing lifestyles and household structures

By 2040, there will be an increase of 25% in single person households in the UK.²



Rapid urbanisation

Between 2016 and 2030, the number of cities with 500,000 inhabitants or more is expected to grow by 80% in Africa and 30% in Asia.³



Fuller

LIVES

HOW IS IT MANIFESTING?: SUB-TRENDS

Delivery 2.0

Direct-to-consumer takes on new meaning as goods can find their way to any convenient, and changing, personal location, not just personal address

Flexi-food

Eating and drinking occasions reshape and shift to suit consumers who seek to maximise their days (and nights), forcing rapid change for food & drink manufacturers and channels

Invisible Digital

Algorithm-based living means less exciting purchase decisions are easily outsourced for consumers

Living Workplace

The blurring between places for work, retail and social life leads to a reimagining of the workplace as an enjoyable and lifestyle-enhancing destination

Techlash

A counter-subtrend in many ways: Consumers become more averse to using technology and sharing their personal information, seeking meaningful and human connections to maximise living

Direct-to-consumer takes on new meaning as goods can find their way to any convenient, and changing, personal location, not just personal address



DELIVERY 2.0



HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers...



Malaysia

“Late night dining is still present in old and young Malaysians which makes 24/7 services or extended hours appreciated today, however, few businesses are being innovative enough with their offerings to deliver to exactly where the person is!”

Lavina, Malaysia



South Korea

“Lotte Mart continuously integrates technology into its shopping experience to provide a better and more convenient experience for the consumer”

Gagyong, South Korea

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Delivery 2.0



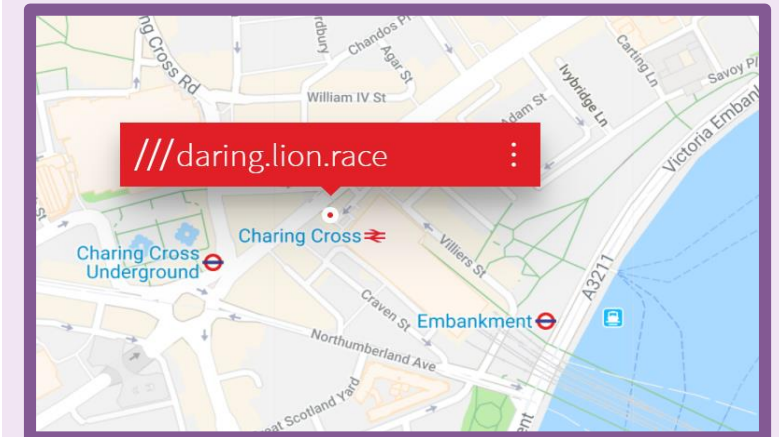
Uber's latest promise to the major urban centres in which it operates is that delivery of goods via Uber will always take under 30 minutes from now on. **Uber is now the world's largest food delivery business.**

(Uber CEO Dara Khosrowshahi, 2018)



Smart locks that can be opened with one time passcodes free up consumers

Walmart has partnered with August SmartLock to enable its drivers to use one time codes to enter customers' homes to unpack and refrigerate any perishable food. Customers can track the delivery and even watch it via smart cameras.



Tagging every corner of the world in a universally accessible system so that unmapped and unregistered locations can be accessible

What3words provides a precise and simple way to share and access locations more quickly and accurately across the world, making no address off-limits for delivery.

Eating and drinking occasions reshape and shift to suit consumers who seek to maximise their days (and nights), forcing rapid change for food & drink manufacturers and channels

FLEXI-FOOD



HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers...

“Supermarkets are always trying to innovate for speed ... making life easy for shoppers no matter what the size of their basket”

Gagyeong, South Korea



South Korea



USA

“Whole Foods stores offer so many different types of shopping experience, whether you want to grind your own peanut butter there and then, eat fresh on site, or get groceries delivered to another place later on.”

Vincent, USA

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Flexi-food

Meal kits (scratch and semi-scratch cooking solutions / subscriptions) were the **fastest growing food channels in the US** in 2018, with total sales of **\$2.2bn**

(Nielsen, 2018)



Strategically placed meat vending machines in South Korea cater to late solo diners

Specifically adapted to fluid routines and small households as they provide one person portions



Algorithm-based pricing based on demand fluctuations pricing meals at differently at peak times

Gebni discounts fluctuate in real time and can range from a minimal 2% to a substantial 35%, even on a \$10 item

Algorithm-based living means less exciting purchase decisions are made automatically, and physical retail automates the point of purchase so consumers can live seamlessly



INVISIBLE DIGITAL

HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers...

“Products and services that do the job for you so you can relax, and get off the phone – that’s what people are looking for”

Marianna, Mexico



Mexico



Germany

“Whoever feels overwhelmed by choices turns to algorithms to make life easier. We no longer really have a choice in the matter, if we want to live life to the full!”

Paul, Germany



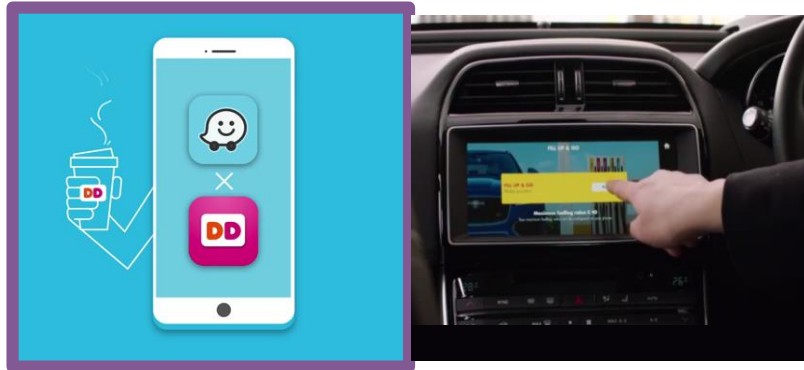
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Invisible Digital



The amount of smart devices connected to the internet is predicted to increase to 75.44 billion in 2025 from 15.41 billion in 2015

(Statista, 2017)



Smart bins mean an end to household shortages

GeniCan attaches to your bin and scans items when you throw them away before saving them onto your shopping list or ordering them directly through Amazon Dash



Microchips which function as swipe cards and payment methods

SJ Railways in Sweden accept tickets on a microchip embedded into your hand, which can be read with a smartphone

The blurring between places for work, retail and social life leads to a reimagining of the workplace as an enjoyable and lifestyle-enhancing destination



LIVING WORKPLACE



HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers...

“Santiago is shifting into something more alive, challenging and captivating embracing diversity and becoming a real multicultural city, more people are willing to go out and spend more on leisure.”

Stefano, Chile



Chile



Denmark

“Co-working, community dining, flexibility in your work life... are largely established in Copenhagen as the optimum way of life”

Kiva, Denmark

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LIVES

Living Workplace



WeWork recently acquired **Meetup** social community platform for **\$200 million**, strengthening the social aspect (with a 35 million strong member base) of their living/working spaces.



ARUP design living and working buildings

For employers-come-landlords who want to streamline the experience of work and play and inspire workforce communities – for example, Samsung’s Green Tomorrow buildings



Santander Work Café redesigns high street space for leisure and business

The spaces host talks on useful topics such as finance, marketing or design

A counter-subtrend in many ways: consumers become more averse to using technology and sharing their personal information, seeking meaningful and human connections and moments of digital detox



TECHLASH



HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers...

Adults in the UK are spending an incredible 7 hours and 56 minutes a day consuming media, up 9% from 2017.

IPA, 2017



United Kingdom



South Korea

South Korea has built a National Centre for Youth Internet Addiction Treatment to tackle technology addiction that is causing violence.

Gagyeong, South Korea

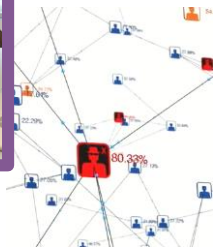
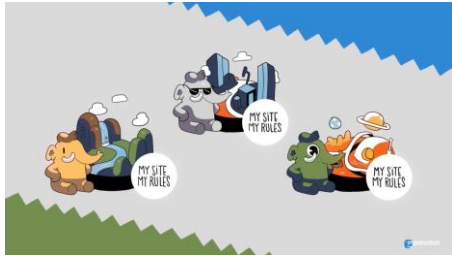
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Techlash



In 2018, the World Health Organisation officially recognised digital gaming addiction as a mental health disorder.

(WHO, 2018)



Digital Wellbeing How we can help you



Understand your habits



Focus on what matters



Switch off and wind down



Find balance for your family

Android apps encourages consumers to take control of their digital lives

Google launched its digital wellbeing initiative to help consumers understand their tech usage and take control of it



What are you looking for?

Backlash against targeting and tracking mean consumers want to be forgotten

Qwant is a search engine that applies strict neutrality rules to search results, they do not use cookies or tracking devices to establish profiles around users

WHAT DOES A SUCCESSFUL BUSINESS LOOK LIKE IN 2025?

IT IS JUST AS GOOD AT MARKETING TO ALGORITHMS AS TO HUMANS

Making algorithms more likely to choose one brand over another in lower engagement categories



ITS PRODUCTS ARE ENABLED FOR 'WALK OUT SHOPPING'

Using sensors and app user-profiles so that automatic payment for the goods can be processed in breakthrough retail environments



IT HAS ADAPTABLE DISTRIBUTION PARTNERS

Exploiting the new channels of B2B and technologies enabling D2C – the best food and drink products will be those that are most accessible – meaning those that can make it all the way to the individual

