New Lifestyles System Data: 2016 Global Consumer Trends Survey Results

Opinion | 21 Sep 2016

We are excited to announce that the latest consumer survey results from the 2016 Global Consumer Trends survey are now live in the Lifestyles dashboard. Euromonitor International's Global Consumer Trends surveys help companies stay ahead of a fast-changing consumer landscape by reaching out to internet-connected consumers from across the globe, then translating the results into comprehensive analysis and actionable opportunities.

What's new in 2016?
The publication of the Global Consumer Trends 2016 survey results marks an expanded commitment to tracking and decoding consumer lifestyles at Euromonitor. In 2016 we added 11 new markets to the Global Consumer Trends survey, bringing coverage up to 20 geographies. In addition, 2016 marks the second annual year of data collection and fourth wave of trend measurement and tracking. We now have survey data from 2011, 2013, 2015, and 2016, including:

- 238 questions tracked across at least three years
- 230 brand new questions for 2016

Key consumer trends in 2016
Below is a preview of four key trends drawn from the 2016 survey results. The full system refresher highlighting key survey findings across all major consumer lifestyles areas can be found here: Lifestyles 2016: New Insights and System Refresher.

1. Ingredient selectivity on the rise
Results from the Global Consumer Trends surveys confirm that consumers around the world are fast becoming more aware of the ingredients in their food and more cautious about what they are willing to eat or drink. In 2015, 35% of consumers avoided at least five separate ingredients or food attributes. In 2016, this number increased to 53%. In addition, more consumers are taking their avoidance of specific ingredients a step further and eliminating, or at least limiting, entire categories and food groups. Dairy, sugar, and carbohydrates have all been villainised in recent years and gluten is now in the crosshairs for many; survey results detail which consumers are consequently avoiding each of these food attributes. Food brands, restaurants, and grocers have an opportunity to capture this growing segment of selective eaters by enabling customers to follow the latest diet trends without the hassle of preparing such specific meals from scratch. Indeed, companies targeting this group may be well
rewarded; selective consumers with at least four dietary restrictions are the most likely to order delivery or takeaway at least monthly.

2. Green concerns centre on self and family

Concerns about climate change are widespread among global consumers, particularly those in regions such as Latin America and Southeast Asia where environmental shifts are already noticeable. However, when money enters the equation, consumer concerns and willingness to pay move from a global view to one much closer to home. Survey results confirm that consumers are more likely to be willing to pay for "good-for-me" product features that have a perceived tangible benefit to personal health and wellness, such as organic or non-GMO, than they are to pay more for "good-for-the-environment" features. While recyclable and eco-friendly product features may boost the buyer's feeling that they are doing something to help the environment, very few are willing to pay extra for those environmentally-focused features. Understanding that not all green features are the same in the eyes of consumers is crucial for any brand or company offering products in this space. By highlighting direct, personal benefits, companies can entice shoppers to pay a value-added premium for certain green products, particularly foods.

Environmental Concerns and Willingness to Pay for Green Features

Note: Shows the percentage of respondents indicating that they agree or strongly agree with statement or that they will pay more for indicated product feature.

3. Continued growth of the "mobile first" lifestyles

Over the past five years global smartphone ownership rates leapt from 20% of households in 2011 to a projected 58% in 2016. For many of these owners, their smartphone is never out of reach, whether at home, work, school, or out with friends.
Even in the past 12 months consumers have dramatically increased their daily reliance on smartphones; 58% of consumers in 2016 turn to their phones for at least five separate activities each day, compared with 34% in 2015. This growing reliance on mobile technology is changing the way smartphone users across all generations (not only Millennials and Gen Z) interact with brands and companies. Mobile-optimised websites and apps are now the rule, rather than the exception, and brands that do not provide easy mobile access to information and products risk alienating shoppers, losing their loyalty and discretionary income for years to come.

4. Consumers buy time to find balance

Competing demands for financial security and strong desires for more time with family and for oneself mean that consumers today feel pressure to make the most out of every moment. And all are looking for ways to simplify their lives. Many companies are currently enabling consumers to spend in order to free up time to do the more important, satisfying things in their lives by leveraging apps and other technologies. Indeed, the consumers who are most willing to spend money to save time are already using technological advances to make their lives a little bit easier: eg, full-time workers with children at home are the heaviest adopters of online shopping, whether via computer or smartphone, and over one-third turn to the internet at least monthly to order food for delivery or takeaway. In the coming years, opportunities for consumers to buy time will continue to expand into more areas of life. Successful companies will be those that can distinguish activities that consumers enjoy and want to spend time doing from those that are viewed as burdensome and mundane, offering opportunities to seamlessly outsource the latter.

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<th>Priority #3</th>
<th>Priority #4</th>
<th>Priority #5</th>
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<tr>
<td>Time with partner or spouse</td>
<td>Long-term financial security</td>
<td>Establishing financial security</td>
<td>Satisfying work</td>
<td>Establishing financial security</td>
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<td>Priority #2</td>
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<tr>
<td>Time for myself</td>
<td>Time with parents</td>
<td>Satisfying work</td>
<td>Establishing financial security</td>
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Note: Shows the percentage of respondents in each life stage selecting listed priority as one of their top three in life.

Learn more about Lifestyles and Global Consumer Trends

The latest Global Consumer Trends 2016 survey results can be found in the Lifestyles dashboards. In addition, more on the trends explored above as well as detail on the Lifestyles system can be found in the system refresher.

Euromonitor International's Global Consumer Trends Survey results are drawn from online consumers ranging in age from 15 to 65. Results from 2011, 2013, and 2015
include 1,800 or 2,000 consumers in each of the following markets: Brazil, China, France, Germany, India, Japan, Russia (not included in 2011), United Kingdom, and the USA. Results from 2016 include 1,000 or 1,800 consumers in each of the following markets: Australia, Brazil, China, Colombia, France, Germany, India, Indonesia, Italy, Japan, Mexico, Middle East (includes Egypt, Qatar, Saudi Arabia, United Arab Emirates), Poland, Russia, South Africa, South Korea, Thailand, Turkey, United Kingdom, and the USA. At least 1,000 consumers in each market are surveyed each round, with many topics tracked over time.