azti
tecnalia

EATrends

Trends with the highest impact for food innovation

Authors:
Sonia Riesco, Nagore Picaza, Elena Santa Cruz

azti
tecnalia

eufic

POWERED BY
eit Food

in collaboration with
food
unfolded®

Contents

1.
About EATrends

Connecting social needs to food innovation

The first step to discover the importance of trends, as food innovation drivers, is to clearly understand what a trend is. An EATrend is a new expression in consumers' food consumption behaviour or attitude, based on basic human needs, desires or aspirations.

Key aspects of trends:

1. People's basic needs reside in them. For example, safety/security, well-being, trust, etc.

2. Global perspective to inspire you. Local perspective for action. Consumer trends are reproduced in geographically and culturally distant societies, as globalisation has homogenised consumers' tastes, and as the needs and basic desires of humankind are universal. However, influenced by culture and territory, those global trends are reinterpreted and expressed in different manners under a more local context.

3. Trends are large, slow movements, which remain stable year after year: but they are dynamic and evolve. They can become consolidated and massive, or they may remain in an incipient stage (niche). Trends can go through the following phases:
   - Emerging: starting to be detected
   - Growing: gaining traction
   - Mature: consolidated
   - Descending: losing force

The ten trends commandments

#1 You will love your **#consumers** above all else

#2 You will not use the word **#trend** in vain

#3 You will return a value **#innovation** for your consumers

#4 You will not confuse trends with **#fashions**

#5 **#You** will observe and analyse innovations to study trends

#6 You will not kill a trend due to a failed **#innovation**

#7 You will take the past into account, but you will look to the **#future**

#8 You will adopt a more **#glocal** perspective

#9 You will come out of your **#sector**

#10 You will use trends as a **#tool** to innovate

2.
The EATrends map

As a result of the work developed over the past years, AZTI has shifted its research on consumer trends to a specific focal point; food. The trends that are marking and are going to mark the food innovation path are presented here. Nine trends have been identified, which are split into four groups.

Value-related trends

These are more emotional trends, the ones that are influenced by awareness, concern for the impact of consumption, and the search for trust in a complex food system.
This group includes the trends of:
- SustainFood – Awareness of food
- Local – Source matters
- Trust4Food - Trust

Lifestyle-related trends

These are more influenced by today's lifestyle, where time management is of prime importance; we live in a continual transit and totally connected, at the same time as we aspire to achieve a good quality of life.
This group includes the trends of:
- Transient food – Food on the go
- Simple & Smart – Technology

Personalisation-related trends

These are trends moved by the demand to personalise products and services to individual needs.
This group includes the trends of:
- Better for me – Personalised diet
- My universe – Tailor-made for me

Experience-related trends

These are more aspirational trends, that go beyond nutrition, seeking more emotional experiences associated with food.
This group includes the trends of:
- EATertainment – Food experience
- Social & Sharing – Social aspect of food

EATrends Map

Values

SustainFood
Awareness of food

Local
Source matters

Trust4Food
Trust

Experience

EATertainment
Food experience

Social & Sharing
Social aspect

Personalisation

Better for me
Personalised diet

My universe
Tailor-made for me

Lifestyle and connectivity

Transient food
Food on the go

Simple & Smart
Technology
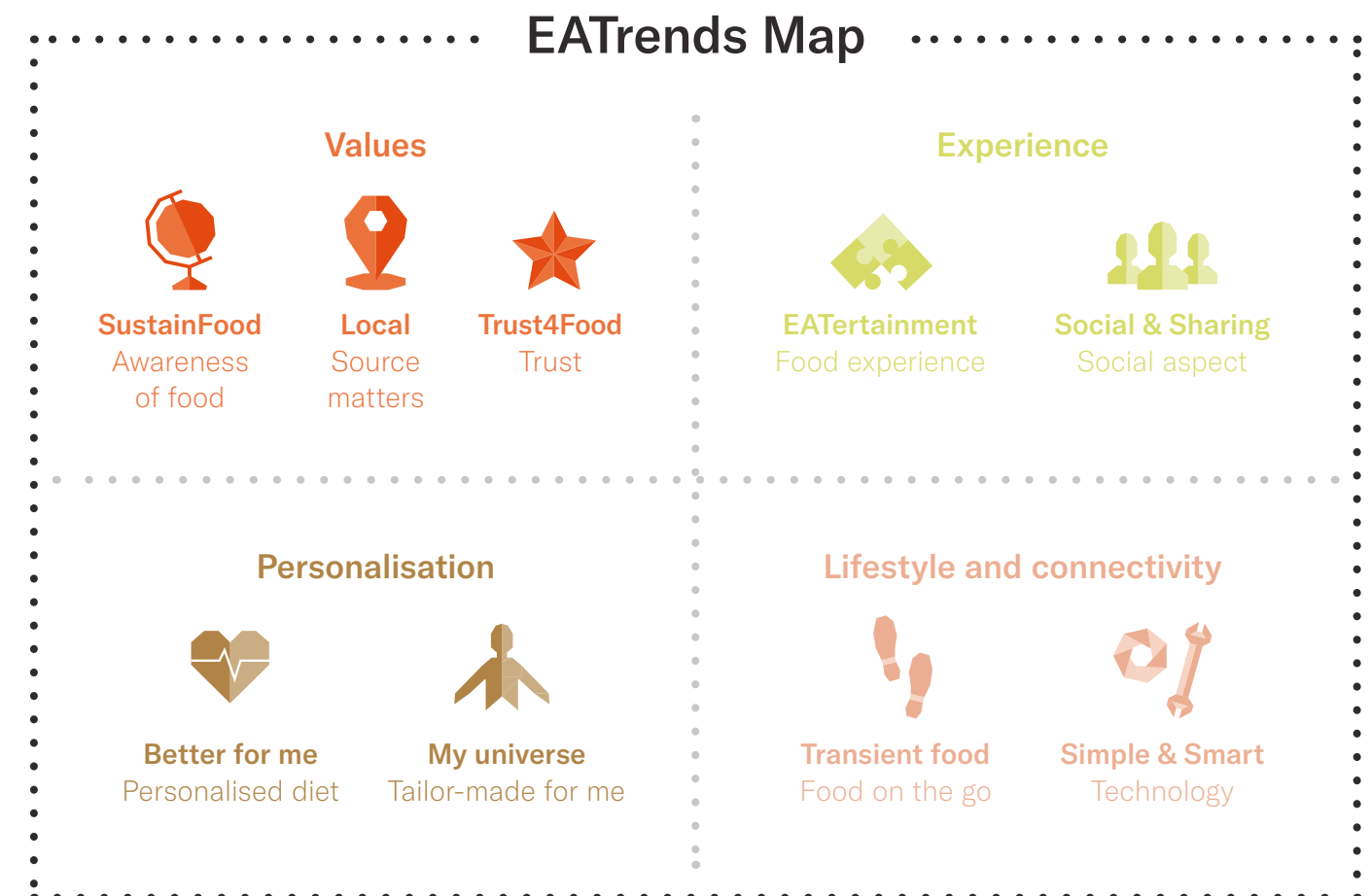
3.
The EATrends

The 9 EATrends

1. Transient food · Food on the go
Food consumption must be adapted to the new urban, flexible and mobile paces of life, with food available any-time and anywhere to satisfy needs on the go.

2. SustainFood · Awareness of food
There is increasing awareness about consuming products and services that are environmentally sustainable, and animal- and people-friendly.
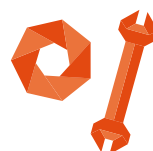
3. Better for me · Personalised diet
We seek to be proactive when managing our health, adopting an increasingly healthier lifestyle and diet, adapted to individual needs.

4. My universe · Tailor-made for me
The expression of our aspirations and our identity as people through consumption, leads to an increase in the demand for "tailor-made" products and services.

5. Simple & Smart · Technology
Faced with the little time available, efficient, simple and accessible solutions are demanded, which save time, help to take decisions, and facilitate life.

6. Local · Source matters
There is increasing interest in the local, promoting a demand for proximity products, which favour local producers and companies, and that I feel more identified with.

7. EATertainment · Food experience
Eating is more than just nutrition; it can be converted into a memorable experience that goes beyond the frontier towards leisure, which is inclusive of entertainment, novelty and emotions.

8. Social & Sharing · Social aspect
We are advancing towards a collaborative culture, with spaces to connect and voice opinions, to participate, learn or influence.

9. Trust4Food · Trust
There is an increasing demand for companies to be more open, honest and empathetic, seeking a greater connection with the food environment, based on values, trust and transparency.

3.
The EATrends

Transient food · Food on the go

This trend arises from today's nomad life and the delocalisation of activities, promoted by a connected lifestyle, and where time and immediacy are more important than ever. This gives rise to the need to adopt diet to this active lifestyle, making consumption more flexible, and efficiently and healthily facilitating access to food and its consumption on the go.

Support data

- According to the United Nations, 73% of the European population currently lives in urban areas, and this percentage is expected to increase to 82% by 2050.
- By 2020 millennials will make up 40% of all consumers, influencing about USD 40bn in annual sales (Deloitte).
- The Food Delivery market is scheduled to double globally between 2017 and 2022. In Spain Food Delivery has grown by 34% (Adigital/Afi).
- According to the European Vending Association, there are around 4 million dispensing machines in Europe (total annual turnover of over €15bn), with more than 80% of these located in workplaces.
- While global snack volumes decelerate, value sales remain strong as consumers "trade up" to indulge in premium or healthier snacks with value added benefits (Euromonitor International)
- Half of European consumers look for healthy snacks all or most of the time; 58% in Spain, 50% in France and 39% in Germany (Mintel).

Inspiring examples

Less structured meals are gaining importance. Snacking is a huge driver that is transforming all categories in the food and beverages industry. Consumers are very willing to buy all types of innovative snacks. Snacking are nowadays becoming meals for one, to be consumed anytime, anywhere.

New business models and concepts that provide convenient solutions have also good growth prospects: subscription models (offering fresh ingredients and recipe boxes delivered to the doorstep) or meal kits (providing all ingredients separately to prepare a quick balanced meal).

Vegetable ingredients allow for a rise in healthy snack options. Meat also is reimagined, with new protein rich entrants that are providing meat in more convenient formats, such as bars and jerky.

Multi-compartment packs that combine several different product types into a single container for grab-and-go convenience.
Source: Kraft´s Oscar Mayer

Brands are under pressure to offer solutions which support consumers' busy lifestyles and needs, including demands for "foodie" inspiration and speed and simplicity of preparation of balanced dishes at home.

A healthy veggie snack they can eat without guilt and a way of getting more plants into their diet in a simple and least-processed way.
Source: Frito-Lay

Fish product hand-wrapped in baking paper which is ready to be served en papillote. The product can be oven-baked straight from frozen.
Source: youngsseafood.co.uk

3.
The EATrends

SustainFood · Awareness of food

The trend arises from consumers' growing awareness of the impact of consumer behaviour on the environment, on animals and the different agents of the food value chain. Hence, the claim that this reverts to products and services that not only generate an economic profit, but also benefits for people and the planet.

Support data

- Food production worldwide represents 40% soil use, 30% greenhouse gas emissions and 70% fresh water consumption. Furthermore, a third of the food produced is wasted (United Nations).

- There is an increasing demand by consumers for sustainable products due to the "environmental shame" felt regarding the current climate crisis (TrendWatching).

- 81% the world's population is concerned about the sustainability of the products they buy (Nielsen), and 87% of consumers expect companies to invest in sustainability (Innova Market Insights).

- Around 75% of millennials, 72% of Generation Z and 51% of baby boomers are willing to pay more for sustainable origin products (Nielsen).

- The number of vegan, vegetarian and flexitarian consumers continues to grow in Europe. According to Lantern, "veggie" diets account for almost 10% the Spanish adult population.

- The demand for organic food continues to increase in Europe; approximately 17% of the new food produce and beverages launched in Europe last year contain the organic claim, in contrast to 9% 10 years ago (Mintel).

Inspiring examples

Finland-based startup creates protein powder made from carbon dioxide. It is made by extracting CO2 from the air and combining it with water, nutrients, and vitamins, via a process powered entirely by 100% renewable solar energy. Solein has the potential to be a revolutionary, sustainable alternative to wheat flour.
Source: Solar Foods

Plant-based eating is one of the key themes that is currently shaping new product developments in food and nutrition. The growth rate of plant-based products (alternatives to meat and dairy products, or even fish) has accelerated, and everything points to this trend continuing in coming years. We still have a long road ahead of us regarding the protein we will eat in the future, including protein from insects, algae or the cellular production of meat and fish. The consumption of red meat could go from being commonplace to becoming a luxury and a taboo, according to Mintel.

Source: Crunchy roasted crickets, Eat Grub

Regenerative agriculture goes a step further than organic. Its aim is to restore soil health in order for this to revert climate change, end world hunger and rebuild deteriorated social, ecological and economic systems.
Source: regenerationinternational.org

Farming turns urban and vertical: we are advancing towards food produced in cities and in local micro-farms. Sustainability is fast becoming a basic requirement for every business. The pressure is on to improve packaging materials, environmental footprint, the supply chain, etc. Technologies 4.0 are allowing for a more ecoefficient agri-food production, also helping companies to keep ahead of the real food demand, thus fighting food waste. The use of bio-plastic, refillable containers and all those solutions or technologies aimed at reducing plastic will be well-received. We also find a new offer of "upcycled" products which, by making maximum use of food by-products, is geared towards reducing food waste.

Baked Beer Snacks are crafted with surplus beer barm from a brewery, produced during the fermentation of beer.
Source: Barmies

3.
The EATrends

Better for me • Personalised diet

One of today's main social aspirations is underlying in this trend: healthy and active growth, associated with quality of life, health and well-being. The greater access to knowledge, the provision of data and monitoring of our lifestyle, has empowered consumers who are more aware of the role that food plays in their health and well-being. And they seek to manage it, preventing disease by personalising their diets, as well as their lifestyles and consumption habits.

Support data

- A report from the Lancet Commission (2019) estimates that, globally, poor dietary choices represent up to one out of every five premature deaths a year.
- Over the past couple of years there has been a dramatic shift in attention to mental well-being, with most global respondents selecting "mental well-being" as the top criteria for being healthy (Euromonitor International, 2019).
- The health and wellness industry is already valued at almost USD 769bn, or approximately 30% of the global packaged food market (KPMG).
- According to CSIRO (2019), the value of personalized medicine worldwide is expected to balloon: health and wellness is forecast to rise 5% y/y from 2018 to 2022.
- By 2025, home DNA test kits will become more common for personalised wellness, and they will have direct applications in diets and personal care (Mintel).

Inspiring examples

Consumers are increasingly mindful about the food they eat. The trend is moving towards simplicity, with more natural and less processed food, with short ingredient lists.
Products are demanded that offer a balance between indulgence and health. Due to the great fragmentation of consumer beliefs regarding food and health, focusing on the multiple health benefits of a product is working really well.

Indulgent ice-cream with its higher protein, low-sugar promise
Source: Halo Top

Consumers are looking at health with a more holistic view, incorporating dietary changes and more actively lifestyle to keep healthy and reduce stress and anxiety levels. We are seeing new proposals for nocturnal rest and relaxation in the market, which increase the feeling of well-being or to improve concentration and cognitive capacity. Based on natural functional ingredients: Adaptogenic mushrooms and fungi, nootropics, superfood, electrolytes, etc.
While long-term health is important, consumers would rather get a quick fix when it comes to happiness. In the case of mood, "feel the benefit" is crucial. Products touting mental health benefits gain traction.

An indulgent mood boost, with cannabidiol (CBD) and other natural nootropics, with brain health benefits.
Source: eatnooro.com

Personalised nutrition goes digital; nutritional consulting is evolving towards real-time personalised evidence-based solutions. We will know in depth our genetics and the functioning of our organism thanks to a monitoring (of our microbiome, membrane lipidomic, blood test...) that will allow a personalized nutrition that promotes individual physical and mental health.

All your necessary daily vitamins and nutrients conveniently 3D printed into a tasty fruity, gummy stack.
Source: get-nourished.com

3.
The EATrends

My universe • Tailor-made for me

Every person is unique, and there is increasing interest in expressing our identity and authenticity through our consumption behaviour. This trend comes from that need to easily and quickly personalise products, services and experiences. Production flexibility, accessibility to do-it-yourself concepts, technology and an increasingly person-centred system, makes the food world unavoidably advance towards product and service personalisation.

Support data

- The divergence between people's individual lifeworlds will increase by 2030, with the increasing demand for personalised products (Z_punkt).

- 76% of global customers expect companies to understand their needs, 51% of customers also say companies fall short of their expectations for great experiences (Salesforce, April 2019).

Inspiring examples

The demand for individual solutions is increasing, with personalised meal kits and meal substitutes becoming mainstream.

Meal kits that offer cooking for one
Source: Mindful Chef

Automated chocolate box service in Brazil. A robot designs your personalized box of chocolates according to your preferences
Source: Icones, by Chocobot/Nestlé

3D food printing is (almost) here. 3D food printing would allow people to have more control over what they choose to eat, and the ingredients and active compounds included in the food, according to every person's needs and preferences.

Sushi Singularity (Japan) is an hyper futuristic sushi restaurant experience. Customers will send in samples of saliva, feces and urine for testing, and based on the results, will be served nutritionally-optimized 'sushi': actually 3D-printed from various edible proteins and nutrients.

Source: Sushi Singularity / Open Meals

3.
The EATrends

Simple & Smart • Technology

This trend arises from the increasing over-exposure to information, products and services, as well as the increasing monitoring capacity of different aspects of life, and the data that this generates. In this context, what is sought is simplification, smart solutions that facilitate time management and purchase decisions, where citizens are empowered to take decisions and to act according to their convenience and/or interests.

Support data

- 18% of purchasers worldwide have made online purchases of food and groceries over the last 4 weeks (Nielsen).

- The global e-commerce market is already worth almost USD 3trn, but with expected growth of 15%-20% annually over the next 10 years (UBS).

- 79% of global customers are willing to share relevant information about themselves in exchange for contextualized interactions in which they're immediately known and understood (Salesforce, April 2019).

- Consumers remember brands that remember them. 91% of consumers are more likely to shop with brands who recognize, remember and provide relevant offers and recommendations (Accenture, May 2018).

- 39% of respondents would now like an eco-smartwatch that measures their daily carbon footprint (Ericson ConsumerLab).

Inspiring examples

Yuka is a mobile application that scan food & cosmetics products to get clear information on the health impact of the products you consume.

Source: yuka.io
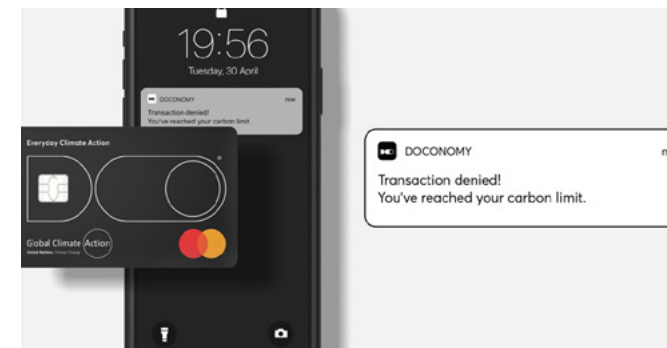
Consumers feel and strive to avoid new kinds of eco-shame. Credit card prevents users from exceeding their personal carbon budget.

Source: doconomy.com

3.
The EATrends

Local · Source matters

In comparison to globalisation and the online consumption universe, this trend reinforces the local, where source takes on special relevance. Local products connect to consumers' more emotional side, and are associated with trust, authenticity, health or identity. They are also associated with cultural aspects, and moreover, there is an increasing awareness about the impact on the social, environmental and economic environment of consuming local. Further, it promotes a closer and more transparent relationship between consumers and the different links of the food chain.

Support data

- For nearly 75% of consumers worldwide, the country of origin of a brand is as important, if not more important, than other purchase criteria such as the quality or price of the product (Nielsen).

- The most important factors for Europeans when buying food are where the food comes from (53%), cost (51%), food safety (50%) and taste (49%) (Eurobarometer-Food Safety in EU, 2019).

- 75% of Spanish consumers are more interested in a product being produced locally than it being organic (Mintel).

- Consumers are willing to pay extra for products that offer the reassurance of provenance (New Nutrition Business).

Inspiring examples

The simplest formulations, based on totally natural ingredients and with a considerable local character, are increasingly more highly appreciated.

Oui yoghurt combines provenance with artisanal style packaging and production. It contains only six natural ingredients.
Source: Oui, Yoplait

It increases the demand for local food produced by smaller companies, as they are perceived to be more sustainable, safer, more genuine and more authentic.

3.
The EATrends

EATertainment • Food experience

This trend is framed within the economy of experience, where the consumption of experiences is preferred over products, and where food goes beyond its nutritional role, and interacts with people's more emotional side. Attraction to anything new is natural in human beings, and this leads us to explore, play, discover. Elements that are incorporated into food consumption experiences in favour of pleasure and entertainment.

Support data

- According to Euromonitor International's Global Consumer Lifestyles Survey, 59.8% of consumers under the age of 44 agree that "it is important to spend money on experiences".

- 72% of millennials prefer to spend money on experiences rather than purchase material things (kantar TNS).

- 7 out of every 10 consumers in the world believe that texture provides food and beverages with a more interesting experience (Innova Consumer Survey 2019).

- 55% of Spanish consumers agree that seeing new flavours encourages them to drink carbonated soft drinks more often (Mintel).

Inspiring examples

Consumers are increasingly looking for exciting experiences and stories to share.

Under restaurant, in Lindesnes, Norway. Through its architecture, menu and mission to inform the public about the biodiversity of the sea, Under provides a unique underwater experience for diners.

Source: under.no

Food is increasingly becoming a sensory experience. Colours, texture, mouth-feel, flavour fusions, ethnic tastes and new takes on traditional cuisines are becoming more prominent. Consumers also want to recreate the restaurant or street-food experience at home.

Premium handmade English crisps, inspired by the flavours of London street food.

Source: londonflavours.co.uk

Artisan, handmade British mustard flavoured with chipotle and infused with tequila to add a unique, adult flavour to meals.

Source: mutinyfoods.com

3.
The EATrends

Social & Sharing • Social aspect

We humans are social beings who seek to express our identity and authenticity, but we also hope to be recognised and appreciated by the community. This trend is driven by the growing participatory culture and collaborative economies. Technology has favoured sharing, connecting (products, services, knowledge), and participating, in an accessible and unprecedented manner. The new citizen engagement, expression and collaboration formulas form a more democratic and gratifying alternative in the consumption sphere, giving consumers more voice, capacity to act and power to change things in favour of a common improvement.

Support data

- The sharing economy is projected to grow from $15 billion in 2014 to $335 billion in 2025 (Forbes)
- Shared economy services will continue to evolve, going from economic profits to social and environmental benefits (Mintel).

Inspiring examples

Connection and self-expression are fundamental human needs. Nowadays, consumers embrace smaller and more intimate online communities to interact with like-minded peers.
Consumers also want companies and brands to defend causes and share them on social networks.

Social networks open new forms of citizen participation, expression and collaboration that can act to improve the food chain.

¿Quién es el jefe? La marca de los consumidores (Who is the boss? consumer brand). A social and collective initiative that gives voice and vote to the consumer to decide what they want to consume, at what price and where they want their money to go, thus promoting a more sustainable, fair and intelligent trade.

Source: lamarcadelosconsumidores.es

3.
The EATrends

Trust4Food • Trust

Consumers are people, and they increasingly demand that more human and emotional part, seeking a greater and closer connection with brands/companies, from whom they claim openness, empathy, honesty and transparency. In short, this trend seeks a relationship of trust in the area of food consumption, as well as mutual commitment and involvement (citizens, companies, institutions...) to achieve the positive transformation of the food system.

Support data

- Only 7% of adults in Spain, France, Germany and the UK believe that today's companies are "open and honest". Spaniards have greater trust in the food industry than their European neighbours, although a high percentage believes that companies are more interested in business than caring for the product quality (Mintel).

- 56% of consumers indicate that stories about brands influence their purchase decision (Innova Market Insights).

- 58% of Spanish consumers have greater trust in a company that manufactures products in their own country (Mintel).

- According to KPMG millennials are 4 times more likely than baby boomers to avoid buying products from multinational food companies.

- 66% of global millennials are willing to spend more on brands that prioritize their sustainability initiatives (McKinsey & Company, 2018).

Inspiring examples

Brand storytelling is increasingly more highly considered; consumers are interested in the source of food and beverage products, and especially, in the source of their ingredients.
Consumers will demand more ethics, greater proximity and quality, both in the relationship between they themselves and in the treatment they receive from the brands.
In the future, brands can be expected to increasingly give priority to people and the planet over profitability.

Kaiku Km0 connects to consumers' desire to know where dairy products come from and to support local businesses. The aim is to build trust and transparency. On the brand website consumers can see where in the Basque Country their milk comes from and get to know the story of local producers' farms.
Source: Kaiku

3.
The EATrends

Consumer profiles

Committed people

You are driven by your values and you believe you can change the world. You are aware and sensitive towards the impact that your consumer habits and behaviour have, and you assume responsibility for this. You base yourself on knowledge, honesty and trust for responsible purchasing. You look for products that are respectful with the environment, producers, society and animals.
You like connecting to the origin of food, and the history behind it. Food is part of your culture, it is tradition…, and you commit to local development and protection of the social, economic and natural environment.

You seek proximity, transparency and information to trust. You demand that commitment from companies, too, because you consider they play an important role in changing today's food system.

The healthy consumer

Health is the most important thing for you, and you are aware of the important role that nutrition and healthy habits play in your well-being and the prevention of diseases, both at a physical and emotional level. You have a proactive attitude: you seek to manage your health and well-being, always hoping for continuous improvement. That is why you always choose healthy ingredients and recipes. You like being active, monitoring your state of health, and using that information to personalise your diet. You seek whatever matches your needs, you are not satisfied with "solutions for all".

The nomad consumer

You have an active lifestyle. To reconcile work, family and personal life, you are always on the road and you are permanently connected. You need to be very flexible and practical, and require accessibility and immediacy to easily, quickly and effectively satisfy your needs. But you also like controlling your activities as much as you can, and use different devices to be efficient, and feel safe and secure: to obtain information simply and functionally, for it to help you to manage different aspects of your life (is my fridge empty? And today is exercise day… what food do I have to buy this afternoon?) You want the smart choice based on adequate information, healthy and accessible options anytime and anywhere for your lifestyle, and above all, optimising your time.

The social foodie consumer

Food is one of your greatest pleasures, and you take eating to a more emotional and experiential plane. You follow fashions and trends, you know the latest and you are active in communities that talk about food: you like participating and getting involved. You are attracted by everything new, it encourages you to discover, try, explore… and share the experience.
You like your role as prescriber, and you seek visibility and proactive participation in communities, connecting with people who have your same passions. That makes you feel that you can influence others and even companies.

With the aim of measuring the impact of detected food trends, an online research about the impact of the different food consumption trends was developed by AZTI in Spain (March 2019) among people over 18 years of age, throughout the whole national territory with a representative sample of 2,000 online surveys.

Survey methodology

Interviewed people had to show their degree of agreement/disagreement (from 0 to 10 points, where 0 "No agreement" and 10 "Totally agree") regarding the 9 identified consumption trends by AZTI, based on previous monitoring published in our **food trends** report, as well as the different attributes that define each one of the trends.

Nine trends had been studied, both directly (question on the general definition of the trend) and indirectly through attributes of behaviour or belief defined for each of the trends. Forty-two attributes had been used (21 behavioural and 21 belief). By behavioural attribute we mean those that imply a declaration of manifest action on the part of the consumer and by belief attribute those that refer to a thought/perception.

Respondents' profile

To select the sample, the following socio-demographic variables of the people interviewed were taken into account:
- Age: over 18 years old.
- Gender: 50% women and 50% men.
- Area of residence: taking into account the 6 Nielsen zones.
- Size of the municipality where the person interviewed resides.
- Role of the person interviewed within the family.
- Role of the person interviewed in the decision to purchase food.
- Number of people in the household.
- Coexistence/non-coexistence with children in the household.
- Social class.

Results

What is the degree of adherence/penetration of trends in our society?
- Do we follow trends? 6 out of every 10 people show a certain degree of adherence to a trend.
- Do we do what we think/believe? In general, trends, rather than being expressed in behaviour, can be found in a stage of belief or aspiration.
- Which trends have the greatest impression on society? The search for experiences and confidence, the drivers in food.

What is the impact of trends in our society/ among Spanish citizens / consumers?
- 6 out of 10 people show a certain degree of adherence to a trend.
- Most of the identified trends are in the growth phase.

- Young people and women; more followers of food trends.

Do we do what we think/believe?
The assessment of the different trends shows that, although there are concepts that are already internalised by the citizenry, the "effective" monitoring of trends is still far from being a reality.
The most important trends are EATertainment and Trust4Food. So, for Spanish citizens, the search for **experience** and **confidence** are the key to approach the world of food.
On the other hand, trends referring to **personalisation** (of products and services) and **convenience** (consumption of products on the go) are those that have the lowest degree of adherence, they are still far from motivating the population, especially older people.

State of trends based on contrast with citizenry
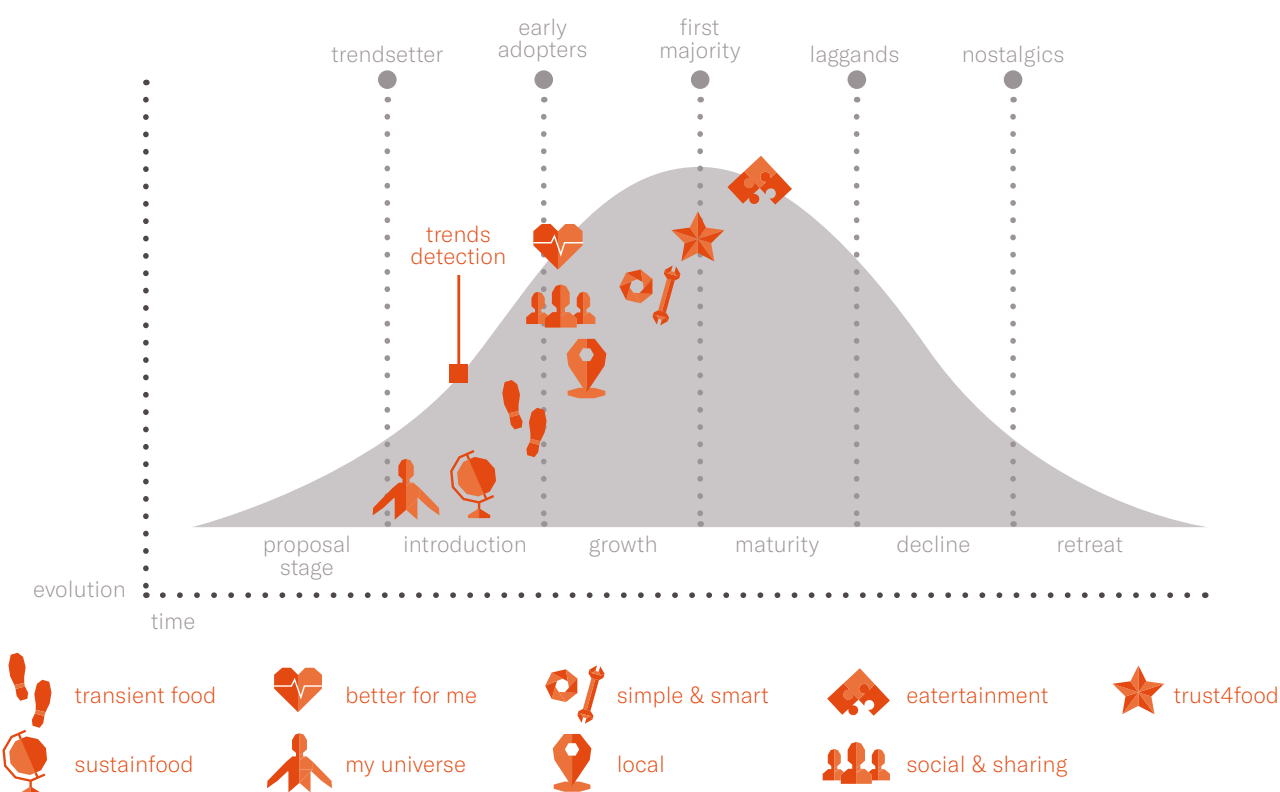
4.
Study of the impact

Regarding the different food trends identified, these are the main inputs obtained:

Transient Food
food to consume at any time • prepared products • save time in cooking • eating on the go can also be healthy • buy online, vending machine

- Most citizens do not consider their lifestyle "on the go".
- Alternative shopping channels (online, vending…) in food are still niche.
- This trend is more pronounced among men, among younger people, in households with children and in large cities.

....

SustainFood
food waste • animal welfare • environmental impact sustainability and ethics in food labelling

- The food waste concept is very much internalised by society in general: there is awareness and people act accordingly.
- However, environmental or animal awareness is not reflected, only a small proportion actually consider this when buying.
- Women, people over 40 and households with children are the most aware.

....

Better for me
we are what we eat • food = health • knowing your dietary needs helps you eat better • I like to eat healthy • I look at whether what I buy is healthy

- Food and health: concepts undoubtedly linked to citizenship/in citizens' opinion.
- 1 out of 4 say they consume foods they consider to be healthy.
- Women and the over 40's are the ones who are most inclined towards products that are beneficial to health.

My universe
personalised diet • nutrigenetic test • adapted and exclusive food • special foods: vegan, probiotics, lactose free, gluten free, etc.

- 4 out of 10 people would be very willing to provide data on their health and lifestyle if they were to obtain a direct benefit from this (personalised diet).
- The consumption of food with special characteristics such as gluten-free, vegan products… is based more on the perception of their healthy character than on the need for their consumption based on medical or ethical prescription.

....

Simple & Smart
information to be able to make purchases • technology to make my food purchase and preparation • clear labels for decision-making • recommendations

- 3 out of 10 respondents firmly believe that food labels do not show all the information necessary to make their purchasing decisions easier.
- People under 40 are more likely to use social networks, and channels such as blogs to get food recommendations, and also, use new technologies more to make easier to buy and prepare their food.

Local
local consumption = social and economic impact on the environment • seasonal products • origin = trust • buy products from the region

Local, a question of age...
- People in their 40's are the most sensitive to local products.
- 26% of the people surveyed believe that local products are more trustworthy: they believe that they are more natural and safer.
- Other research carried out by AZTI through the use of other qualitative methodologies confirms a greater impact of this "local" trend among people with a higher education and purchasing level, as local products are perceived as more expensive and a higher quality is attributed to them.

And it is about money, too:
- Higher social classes are more predisposed to buy local and seasonal products.

....

Entertainment
taste of new flavours • food experience • tasting sessions, tastings, courses, workshops, etc. • enjoying the food

- 3 out of 10 people surveyed are willing to try new flavours and textures in food.
- This is the trend that achieves the greatest adherence: for the majority, food goes beyond nutrition and associates eating with emotions and pleasure.
- Women show greater curiosity, desire to experiment with food and live experiences.
- The elderly are the ones who enjoy buying and preparing food the most.

Social & Sharing
participation • collaborative innovation • consumer communities • collaborative consumption • share • social networking • recommendations • my opinion matters • interest in taking part

- 44% people interviewed say they would like to participate in the design of a new food product, or test new products before they are launched on the market.
- The youngest, those who most seek to influence and to be influenced through social networks.
- The most likely to participate, collaborate, give their opinion… mothers with minors.
- Most would like to play a more active role in food innovation.

....

Trust4Food
close and humane companies • ethics • sustainability • transparency • interest in origin, production and processing

- 2 out of 10 people surveyed are interested in being informed about the origin, mode of production and processing of the food they consume.
- One of the trends with the highest impact on society
- There is an implicit demand for greater transparency and closeness on the part of the food industry, especially among families with young children.
- 4 out of 10 people would stop buying a brand when they find out that it produces in an unethical and/or unsustainable way.
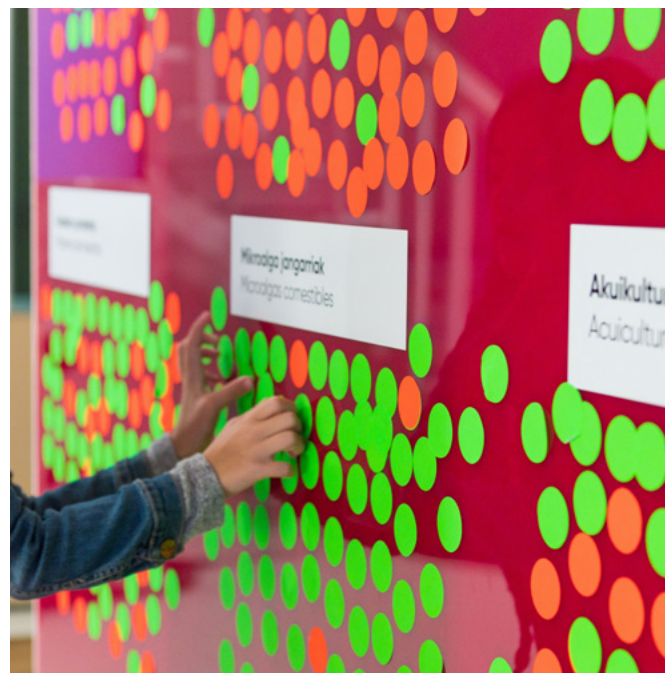
5.
A people-centred food system

The important role of citizens in food innovation

The food system is being transformed and it is increasingly in line with people's changing needs. The increasing knowledge obtained from consumers is making us move towards accessible, safe, sustainable and healthy food. To this end, engaging people in this transformation and in food innovation is essential. For that innovation to be quicker, more efficient, and above all, appeal more to people.

Trends only reveal some of people's needs, desires and hopes. Complementing this knowledge of consumers with other sources is thus necessary, including: monitoring market studies, sensorial research, quantitative and qualitative studies, etc. In addition, new approaches for consumer research and innovation with consumers.

User experience

We have designed a first experience, **Food Fashion Festival**, where an event has become an experiential formula to involve the consumer and arouse interest in the science that lies behind food and the food future.

Communities

In **The Food Mirror** initiative, we wanted to start to construct a trend hunter community that would provide insights to help us to identify, investigate and see the evolution of consumption trends.

Collaborative innovation: cocreation

Cocreation is the name given to innovation-centred collaborative exercise, which involves people in the creation and design of new products and services. Cocreation teams are one of the key pieces in the success of innovation processes, so engaging potentially creative people with a visionary spirit is elementary.

Citizen science

Citizen science projects promote collaborative scientific research, engaging scientists and non-professional citizens (amateur scientists), who actively contribute to science with their intellectual effort, or giving support to knowledge with their tools or resources.

This open, collaborative and cross-cutting scenario, leads to more democratic research, where citizens, in addition to affording value to the research, acquire new expertise or skills, and a better knowledge of the scientific method in an attractive manner.

Food Fashion Festival Bilbao - © Benjamin Arthur

azti
tecnalia

Parque Tecnológico de Bizkaia
Astondo Bidea. Edificio 609. 48160 DERIO (Bizkaia)
Tel.: +34 94 657 40 00 Fax: +34 94 657 25 55
www.azti.es • **info@azti.es**