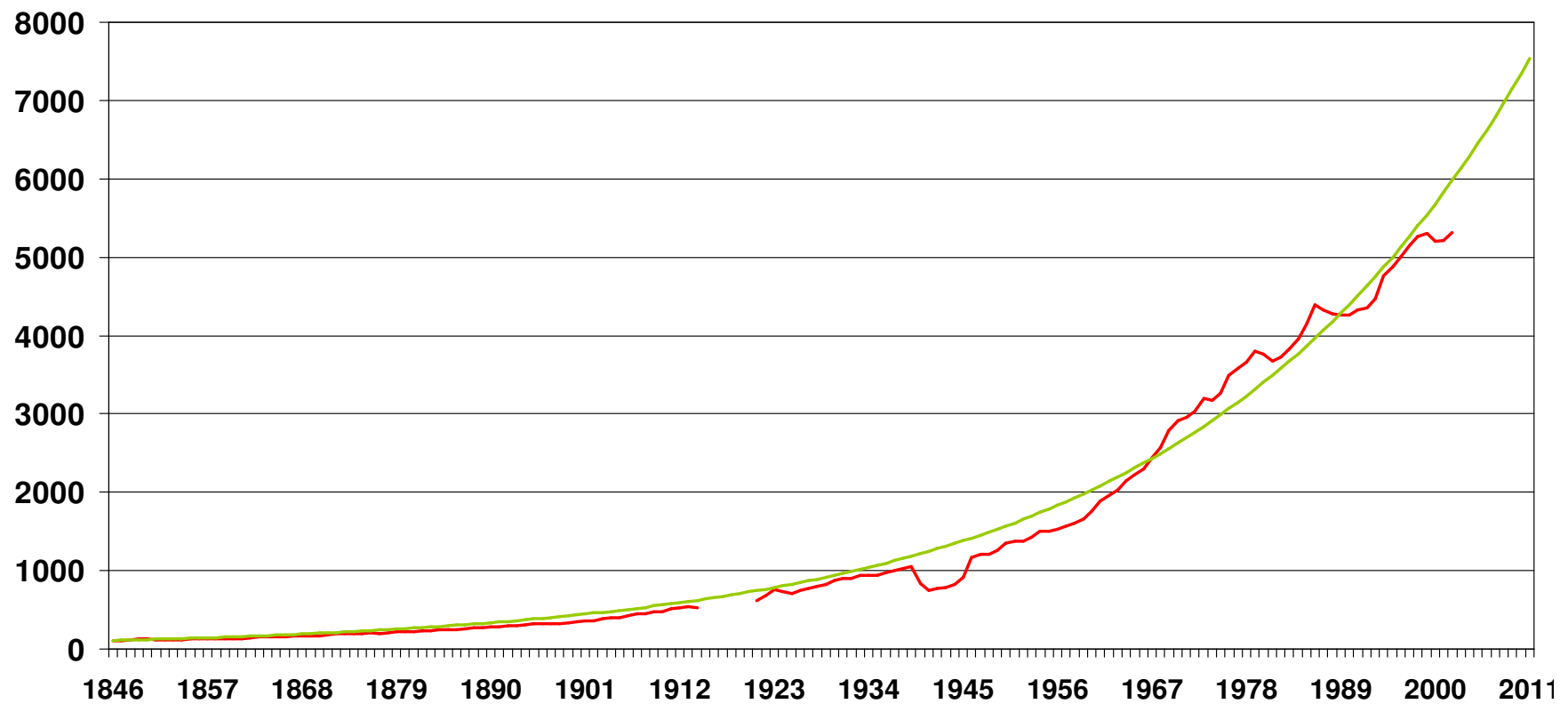


Future consumer and lifestyle trends in a European perspective

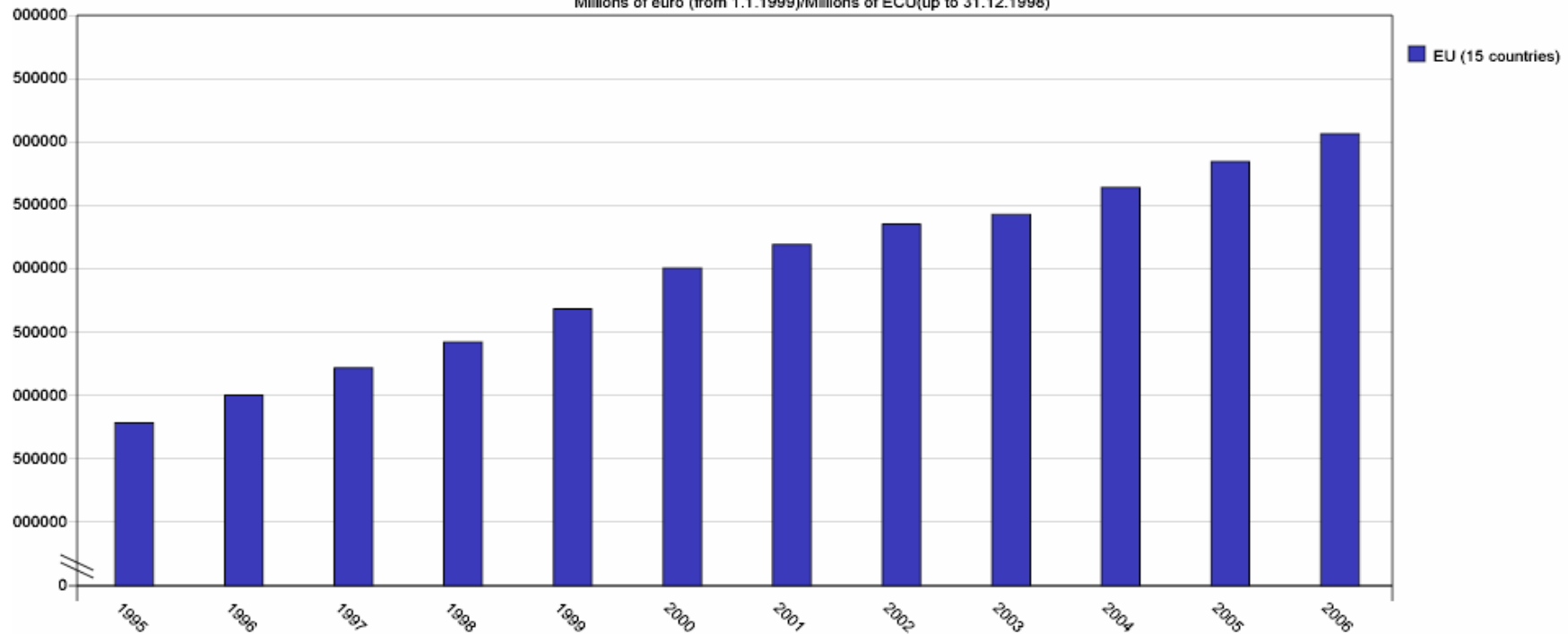
**Jesper Bo Jensen, Ph.D.
political scientist, futurist**

Private consumption



Consumption in the 15 old EU members

Final consumption expenditure of households and non-profit institutions serving households
At current prices
Millions of euro (from 1.1.1999)/Millions of ECU (up to 31.12.1998)



Source: Eurostat/CH: Secrétariat de l'Etat à l'Economie/US: Bureau of Economic Analysis/JP: Economic and Social Research Institute

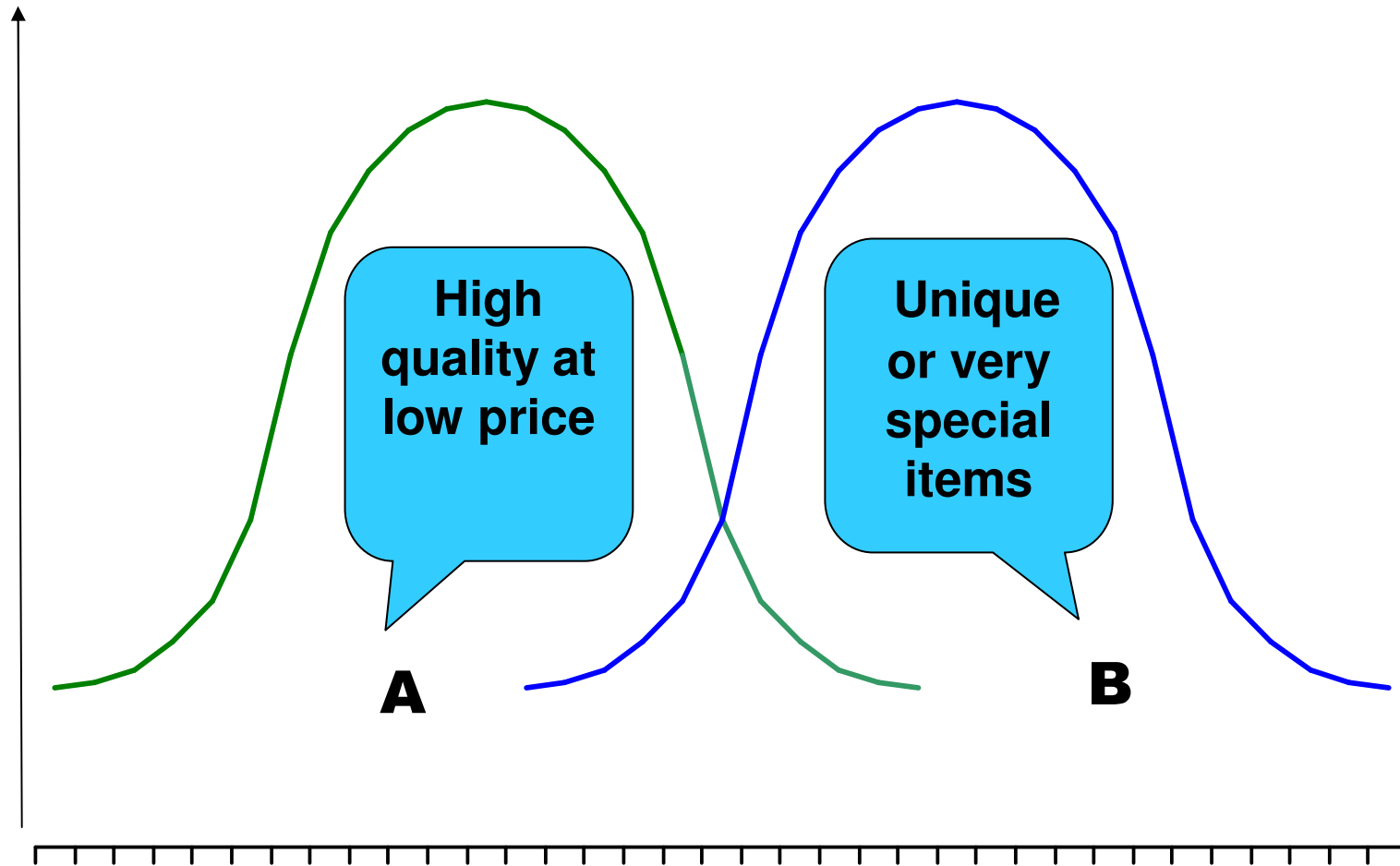
Situational consumption: The outcome of getting richer



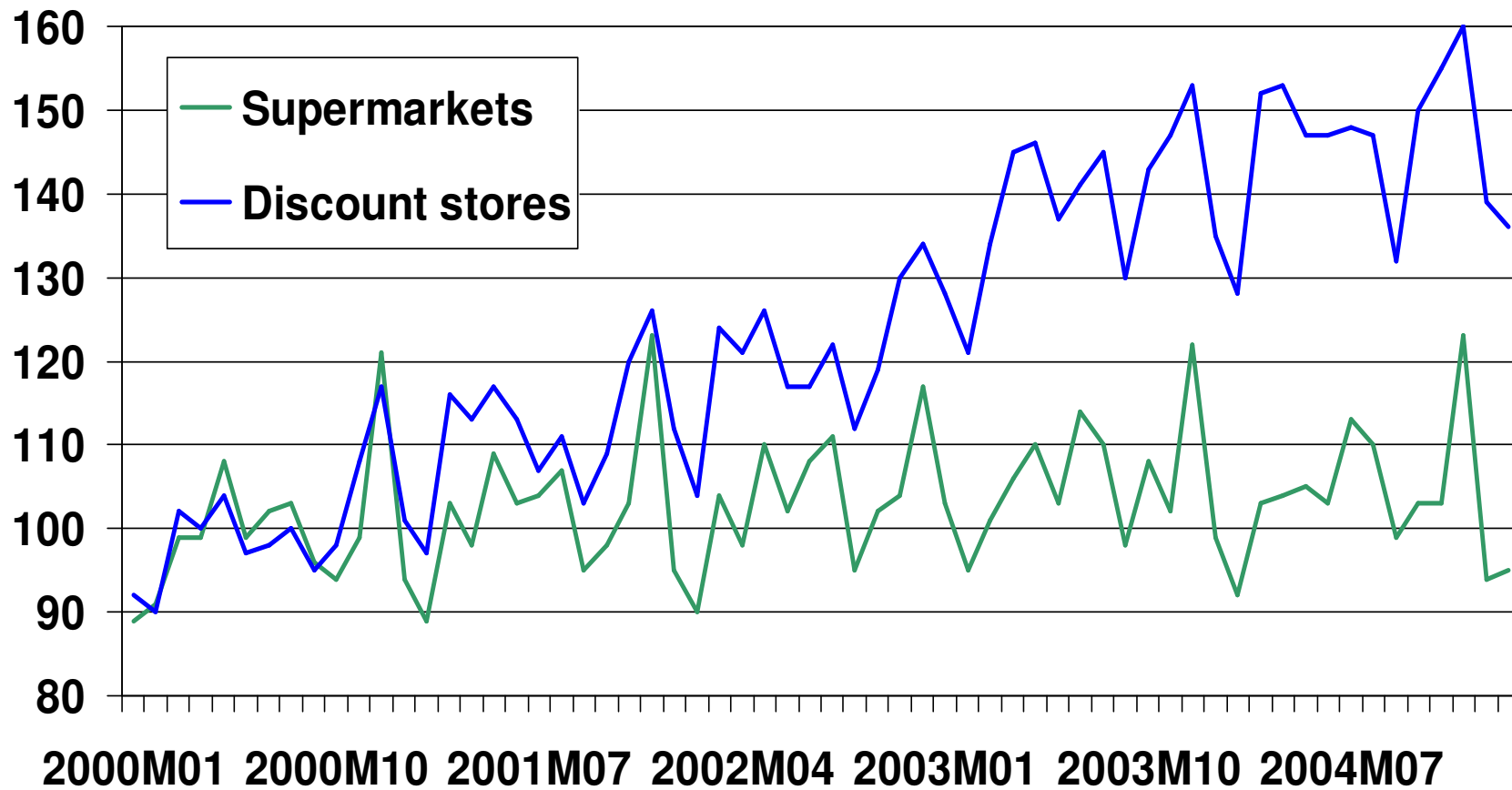
- Private consumption doubles every 30-odd years
- Consumers do not buy out of needs, but increasingly by inspiration, temptation or simply accidental
- Retail Institute Scandinavia research
- The old lifestyle segments have disappeared - everybody buys everything – but not at the same time and day or in the same mood
 - Research of elections, sociology of families and research into the way we raise children all confirms this
 - Consumer segments have disappeared as before them classes and the old hierarchical society

The dual world of modern consumers

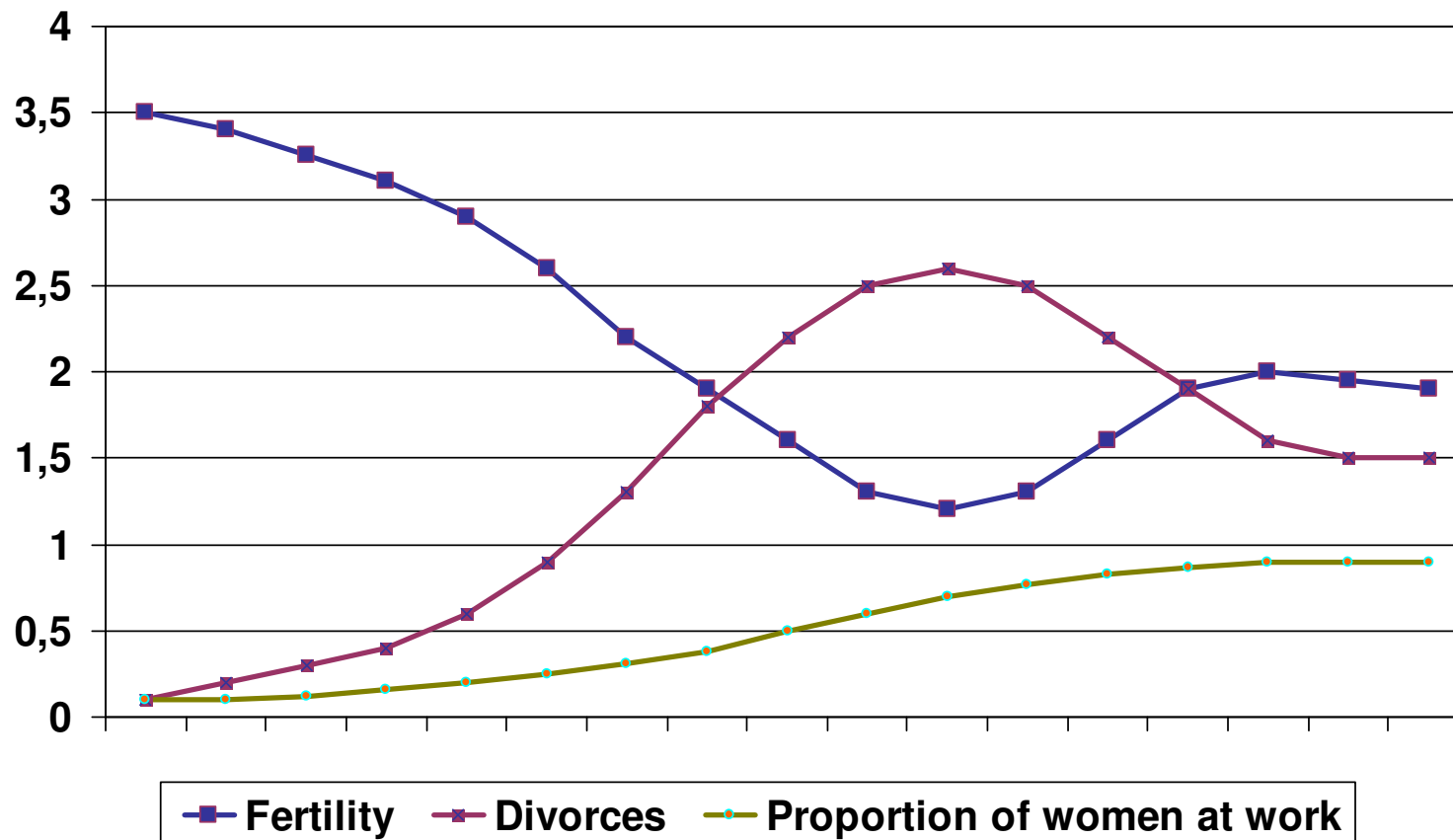
Density



The discount debacle



Family Development



Average age of marriage - women

NORTHERN EUROPE

Channel Islands

..

Denmark 1970 22,1 2001 30,7

Estonia 1989 22,1

Finland 1970 22,5 2000 30,2

Iceland 1974 21,9 2000 30,5

Ireland 1971 23,5 2002 30,9

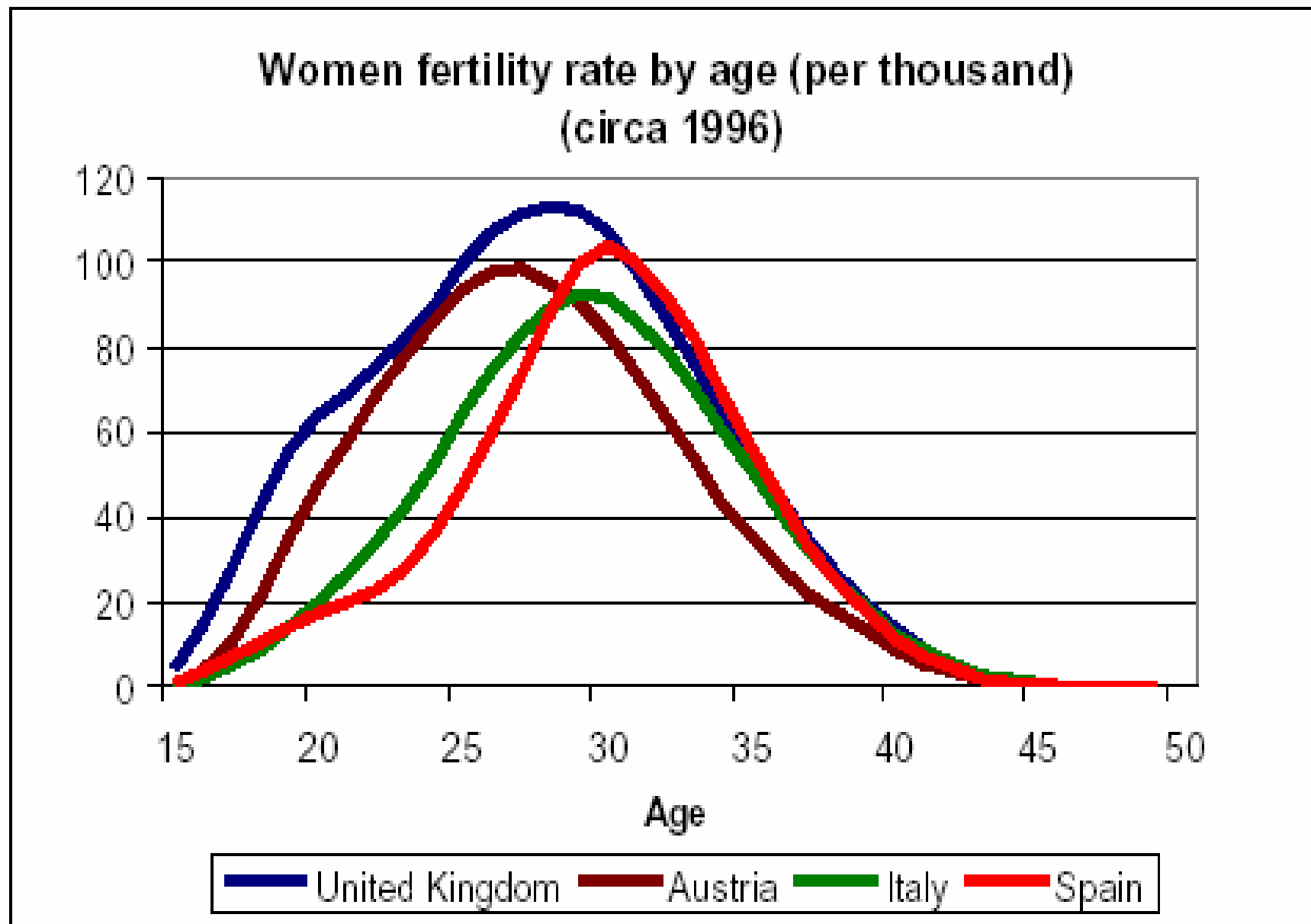
Latvia 2002 26,9

Lithuania 2001 24,8

Norway 1970 21,9 2002 31,4

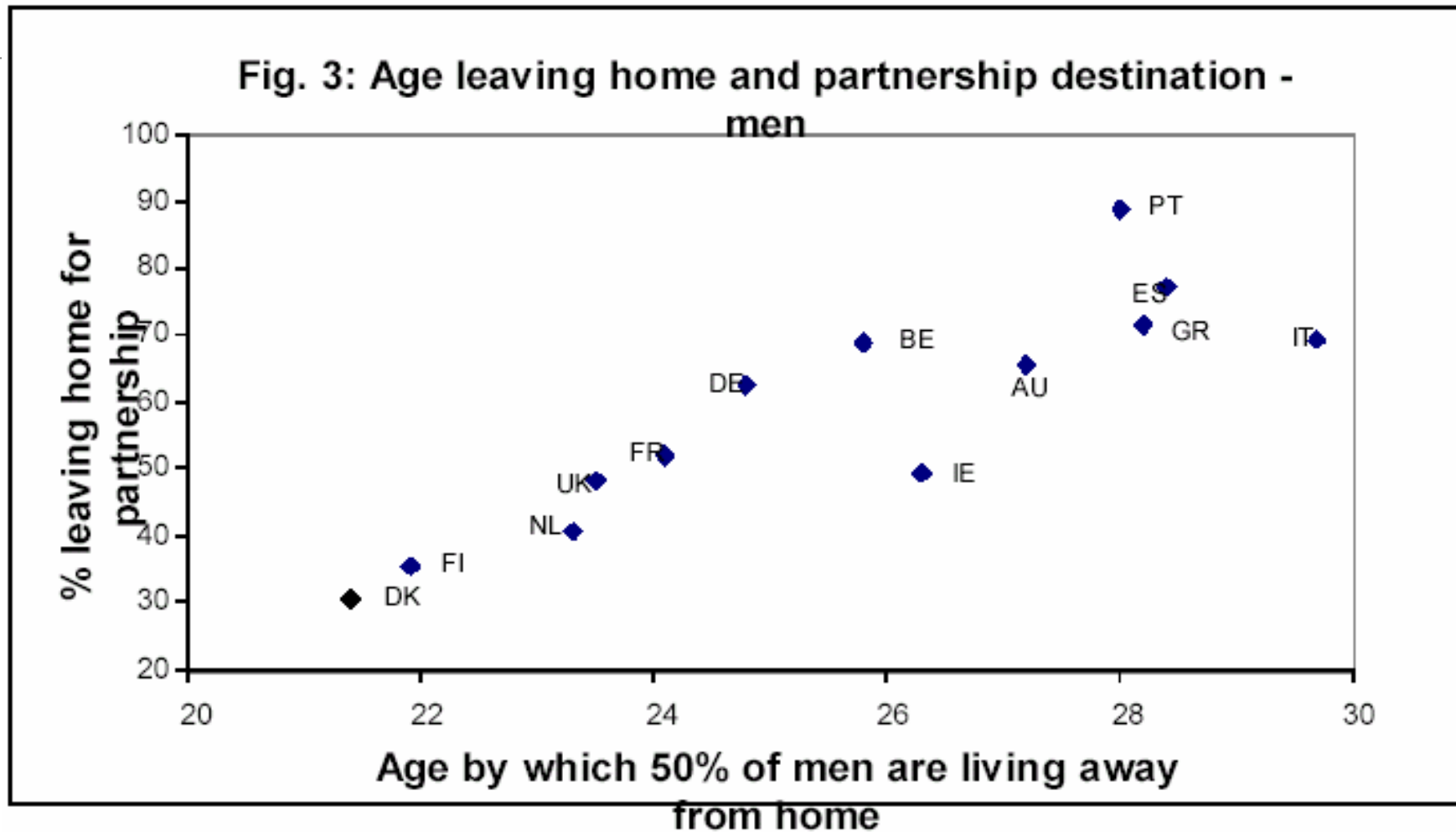
Sweden 1970 23,7 2001 32,3

United Kingdom 1971 21,3 1991 26,4

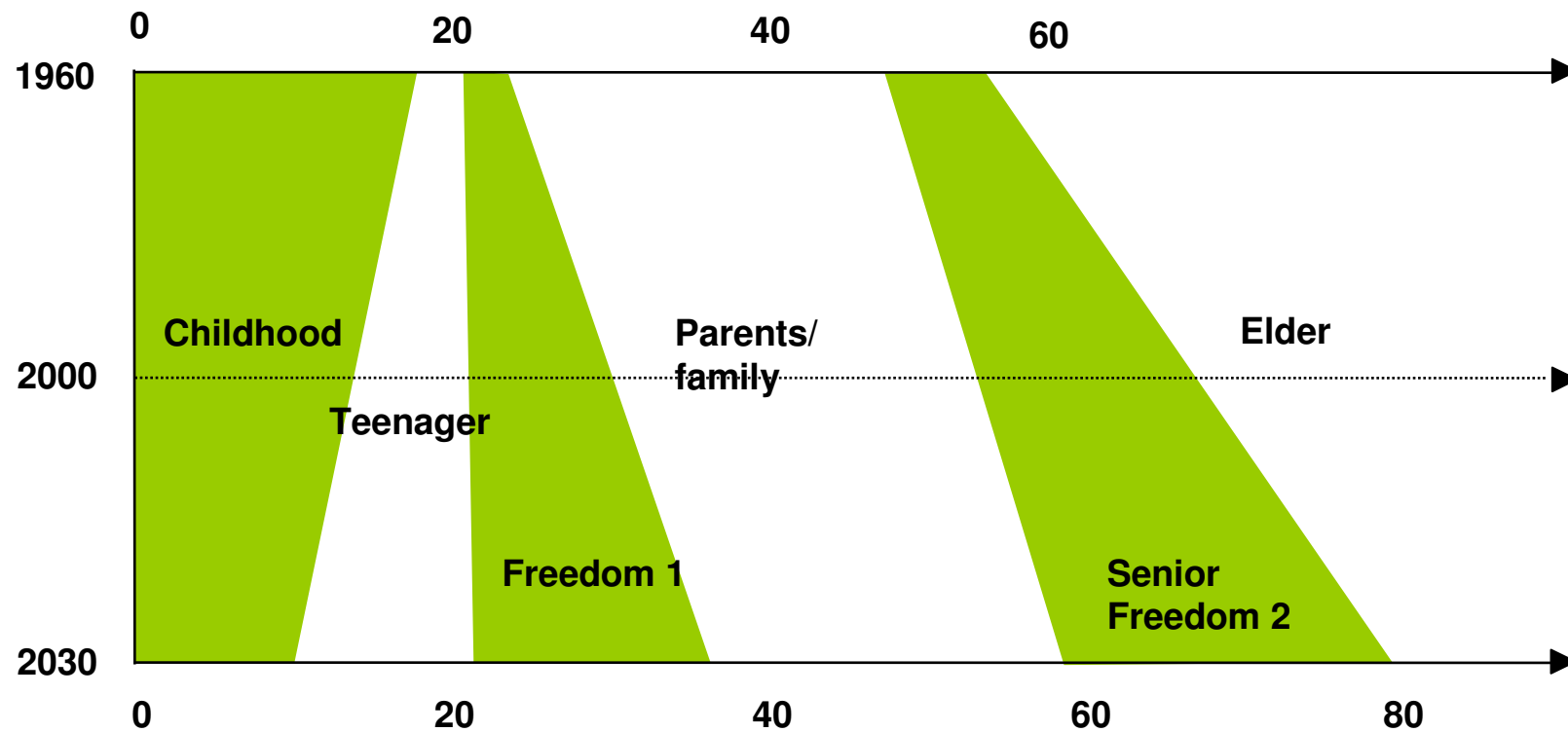


Source: Observatoire démographique européen, St Germain, France
(UK: data only for England-Wales)

To stay at home...



The New Phases of Life



The Nursery Generation

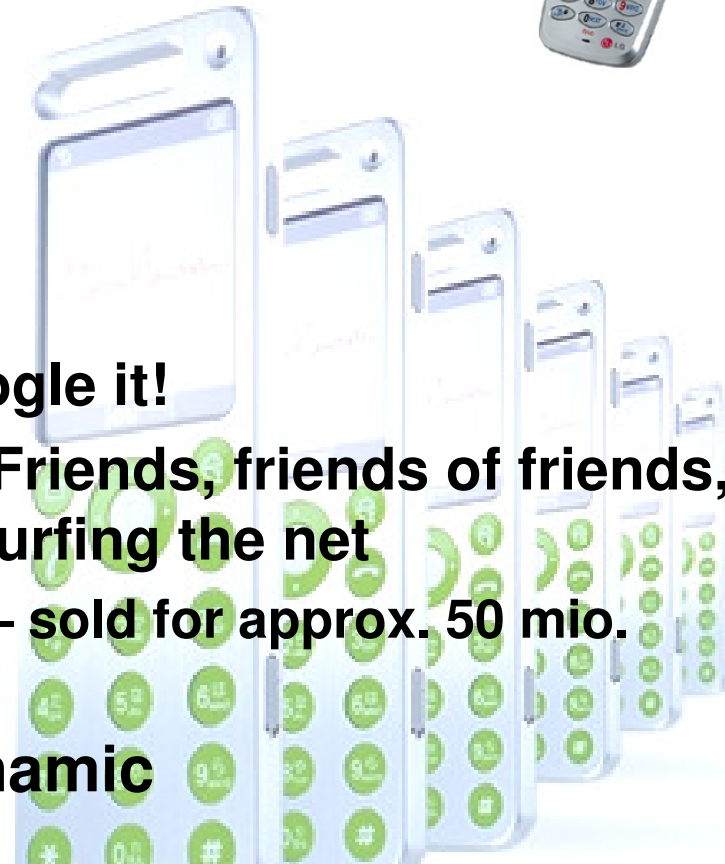


- **What do you feel like doing today, little Michael?**
 - Adults as a resource
 - Consider oneself as a part of a group – with age and school several groups – leisure time groups, family, school, recreation scheme etc....
- **The media-generation – used to multipel tv-channels, advertising, multi-tasking**
- **Not selfish but individualistic: Everyone has the right to fulfill their dreams**
- **Parents' priorities 5-10 years ago: Strong and considering**

The SMS-generation (prior the Nokia-generation)



- **Get into their pocket**
 - What's in it for me?
- **Learning to live online:**
 - Shopping online
 - Finds something to buy – google it!
 - Gets information in circles: Friends, friends of friends, SMS to groups, MSN-chat, surfing the net
 - H&M Carl Lagerfeld collection – sold for approx. 50 mio. Euros in three days
- **Reinventing retail: Use it dynamic**



Other factors



- **Old Europe (EU15) gets greyer – more elder, less at the labour-market**
 - **Falling gross rate – consumption growing at a max. of 1,5-2% a year**
- **Will the nursery generation learn how to cook? – and will they prepare their own food?**
- **Rapid growth in former Eastern Europe**
 - **Consumer tendencies like our part of the world 40 to 50 years ago**

Consumer resources

- **Modern consumers do not lack money – they are short on attention and time**
- **Time**
 - The time budget plays a big role in modern two working parent families
 - Lacking time to buy is the most frequent reason not to buy
- **Attention**
 - Mental awareness is at limited good – demanding it requires something to exchange of importance
 - The less attention needed, the more room for emotions and intuitions creating impulses to buy
 - Do not pose questions and demand decisions

Food trends



- From focus on fat, sugar, calcs & carbs, cholesterol and special diets to a new focus on nutritional value of the overall intake
- A healthy diet – all
- Food and status. You are what you eat – high status in the right food
- Individual nutrition plan
- Food – exercise – mental health, school children and learning, seniors and health, (prescriptive exercise and nutrition)
- Functional food & healthy GMO food

Food trends 2



- **Eating out – on the go**
- **Political demand**
 - The public sector going ecological
 - The political consumer – and what he/she isn't going to do
- **Luxury foods – democratization of luxury**
- **More discount and more luxury**
 - 80% - 20% in Europe
 - Ecology will stay a niche

Trendshift 2005-2006



**Normally trends shift gradual and incremental
But every third time the change is more fundamental
We are in for a bigger change this time**



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