

Constantly Connected

Smartphones, Wearables and Our New Relationship With Food

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Emerging Trends in Wellness
April 2019

Davidcdonnan.com

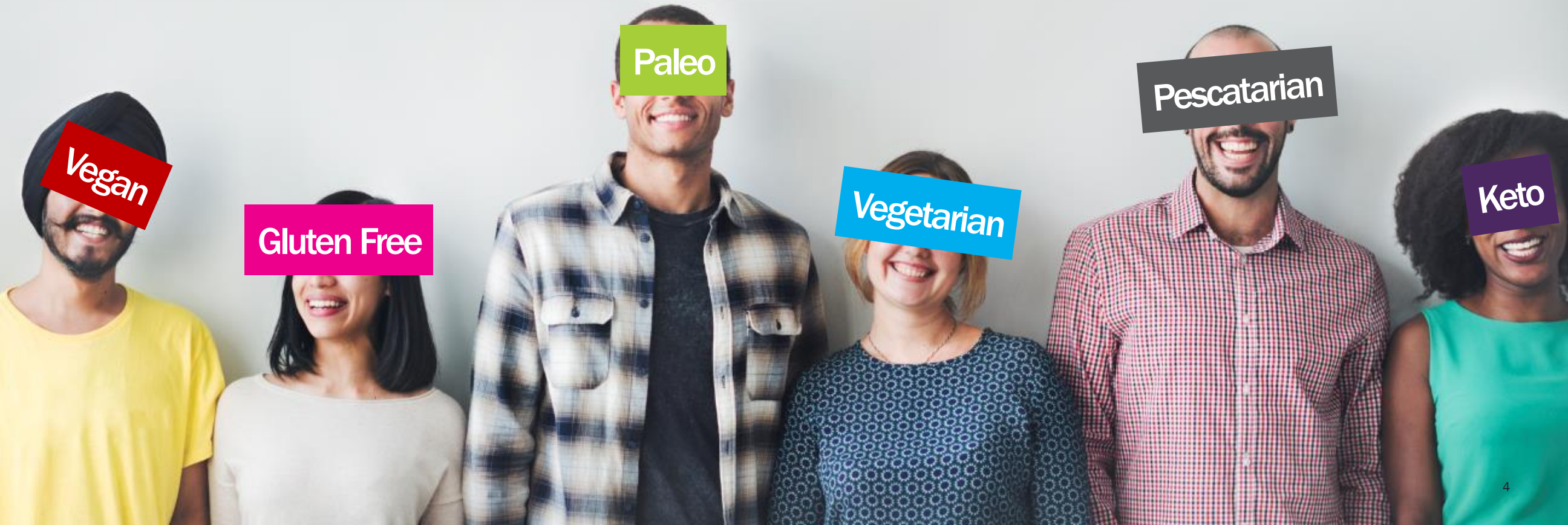


ValueValues

Our geographic culture has always defined our food



Now our food defines our culture



Today, our diets and eating patterns are being influenced by



Rising healthcare
costs



Community,
family and friends

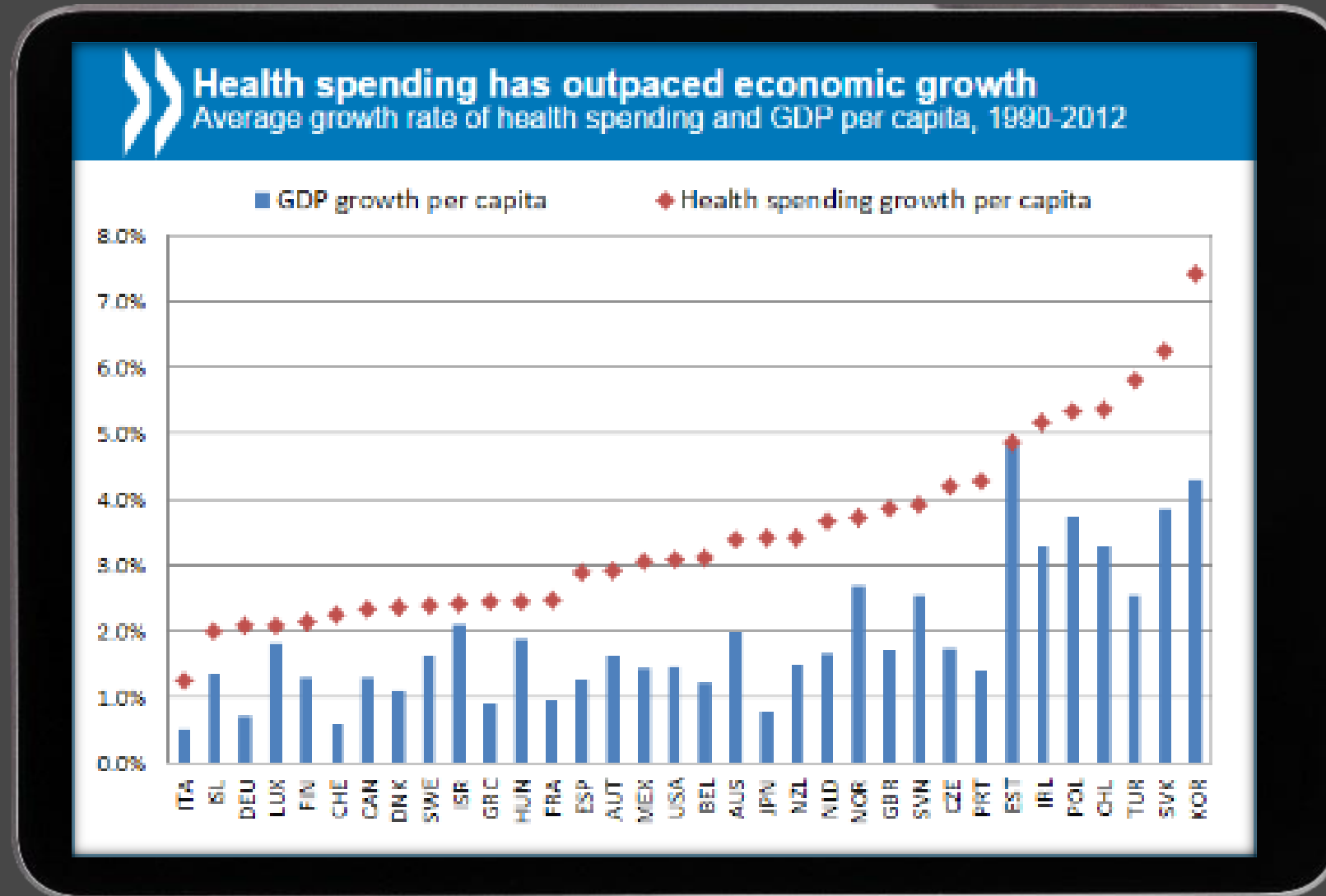


A focus on
well-being

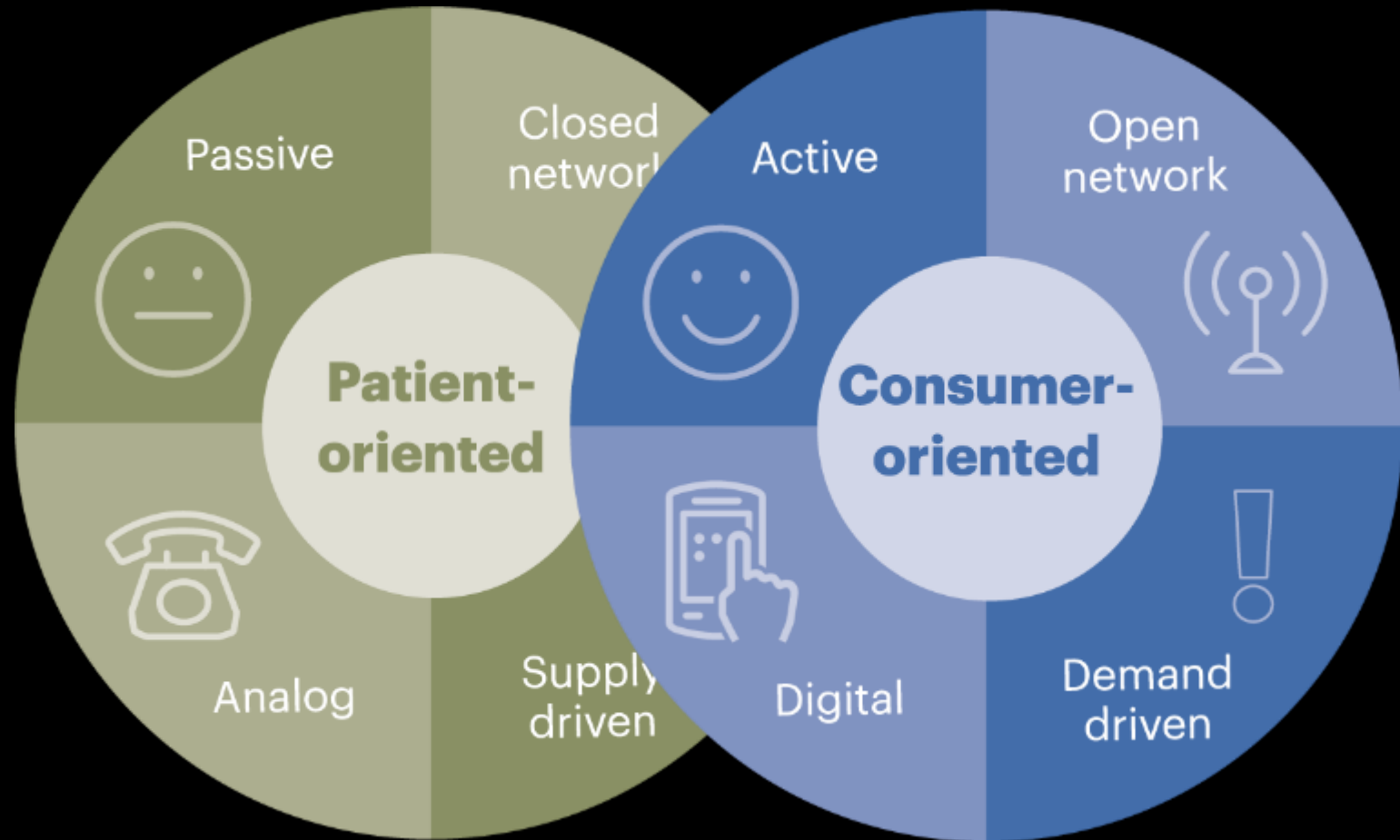


Mobile technology
and AI

Globally, healthcare costs are on the rise



We are seeing a shift towards consumer-centric healthcare



Consumers are shifting toward new influencer relationships



Laura Vitale

The **paradox of communication** in the Digital Age:

3.8 M visitor/month

1.1M Instagram followers





70%

Millennials influenced
by peers

60%

of consumers influenced by
social media post when shopping

50%

of consumers post
pictures of their food

Products that promote wellness are demonstrating significantly stronger growth compared to mainstream items

OVERALL FOOD
CATEGORIES HAVE
A MEAGER

2%
GROWTH RATE



Overall Food
Categories

Natural and
Organic

Refrigerated RTD
Tea & Coffee

Wellness Bars &
Gels

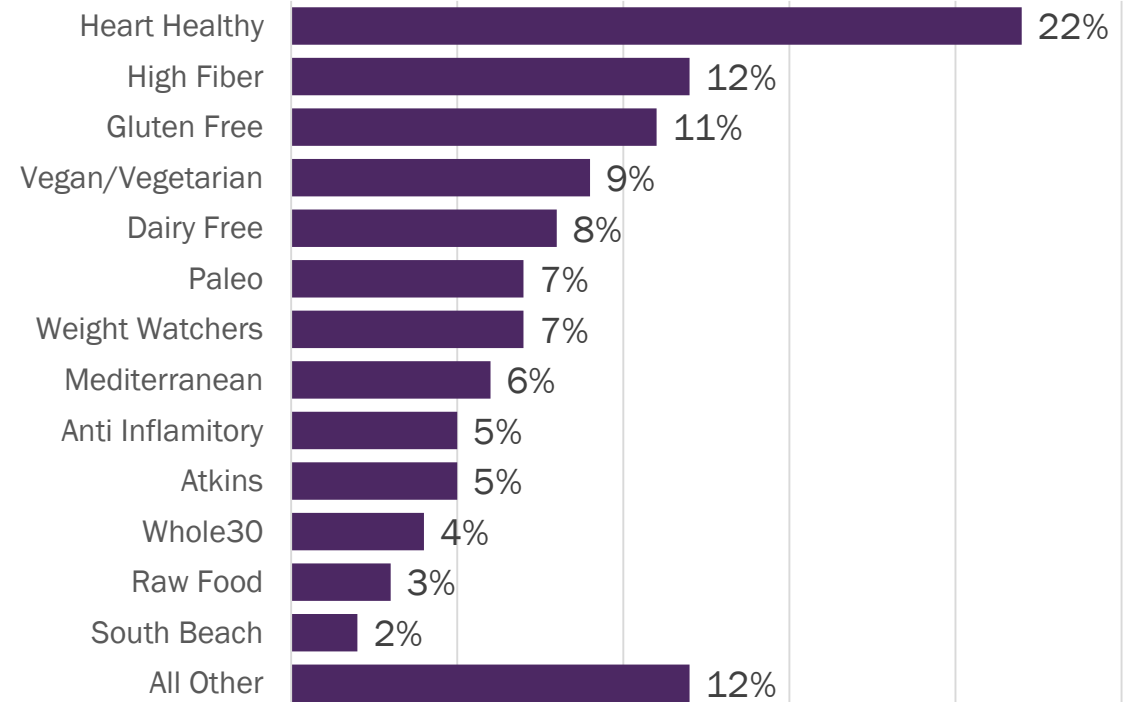
Shelf Stable
Functional Beverages

Refrigerated Plant-
based Milk &
Creamer

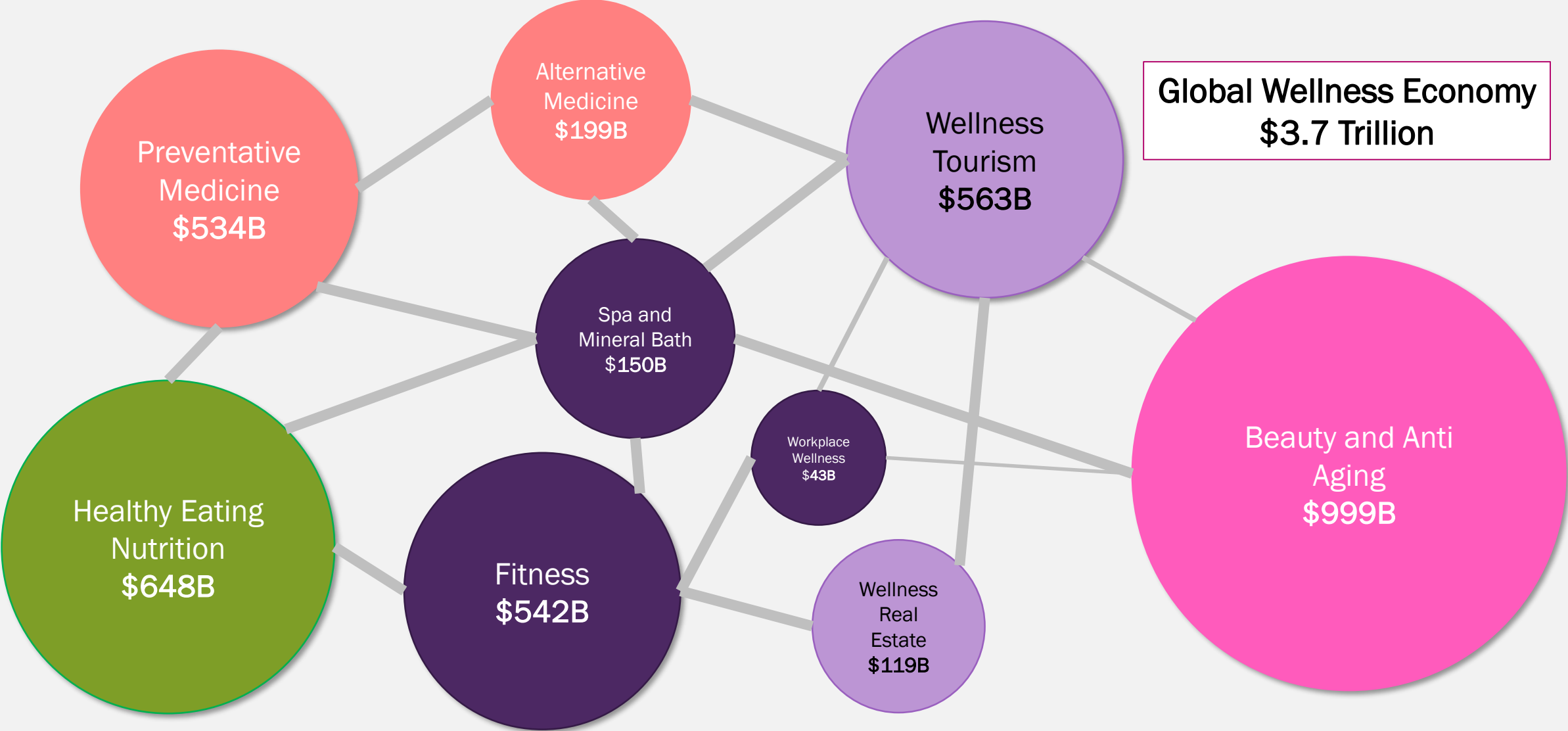
Yogurt & Kefir

49% of consumers subscribe to a specific diet or health program

Which diets do you follow?



The Wellness economy is expanding

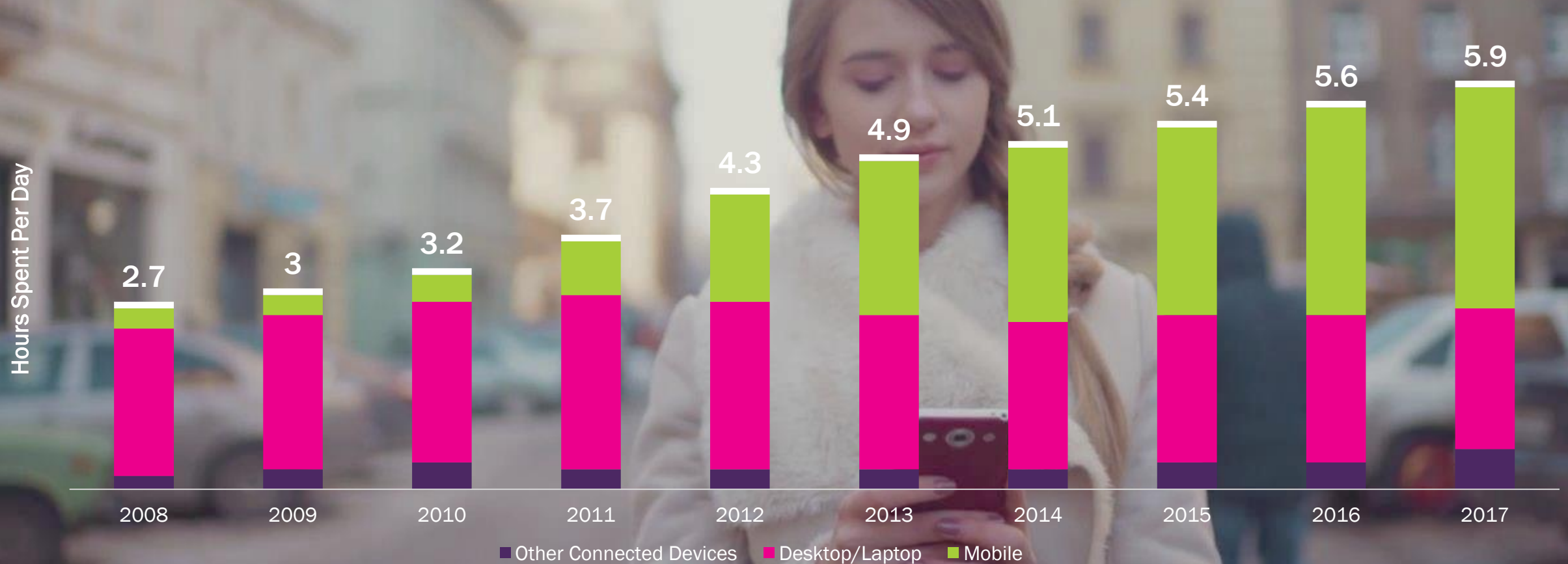


Health & nutrition is big business



Technology is now part of our everyday lives

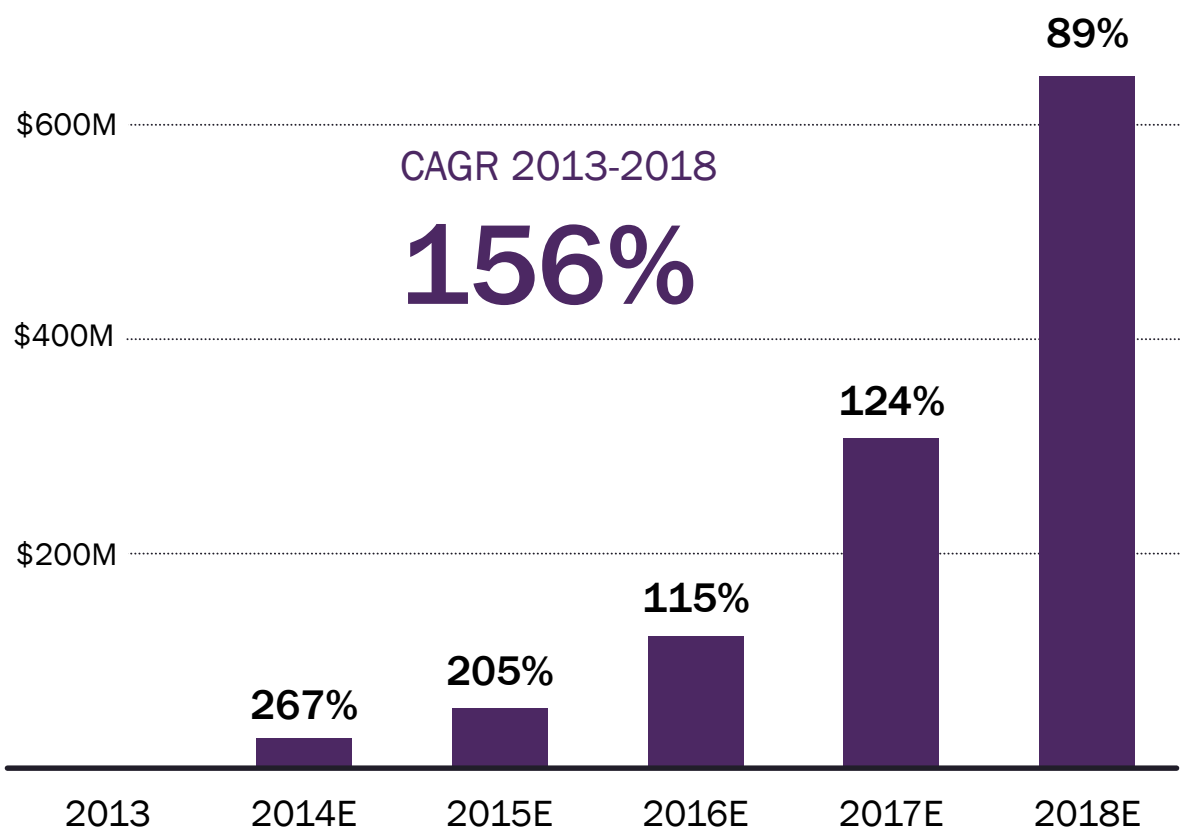
Daily Hours Spent with Digital Media per Adult User



More sensors and data in more places each year



Wearable market unit forecast



All of these will have profound effects



Technology provides
instant feedback



Our food choices **are influenced** by
perceived outcomes



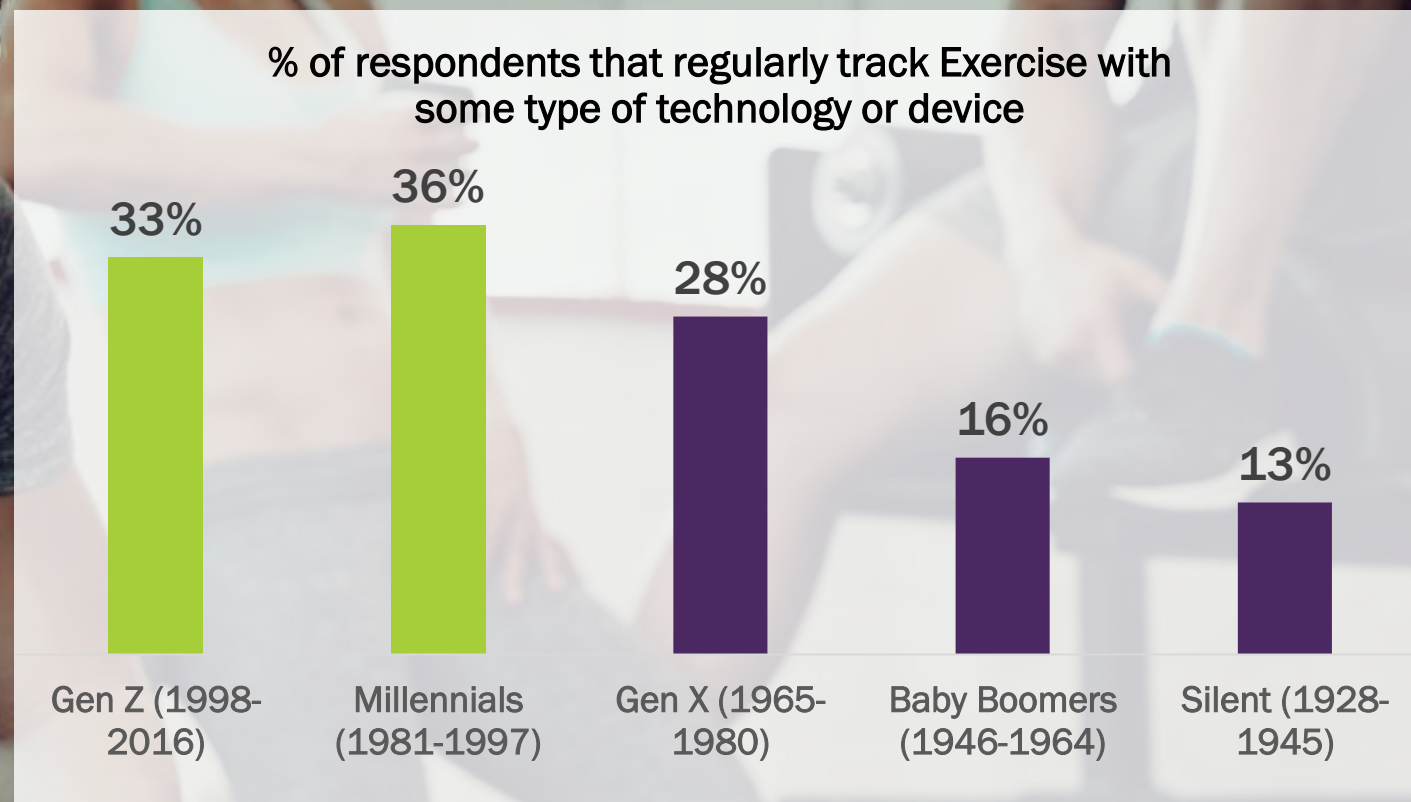
It **will change** how we choose our
food

We track our activity and health

Which of the following do you regularly track through some type of technology or device?



Again, Gen Z and Millennials will lead the change



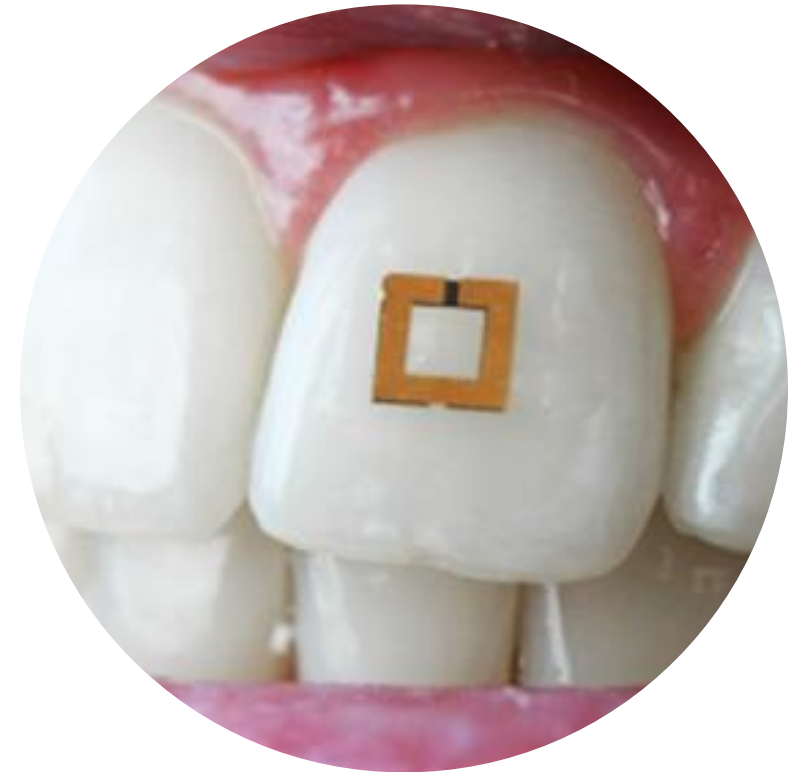
Next frontiers



Heart rate and monitoring

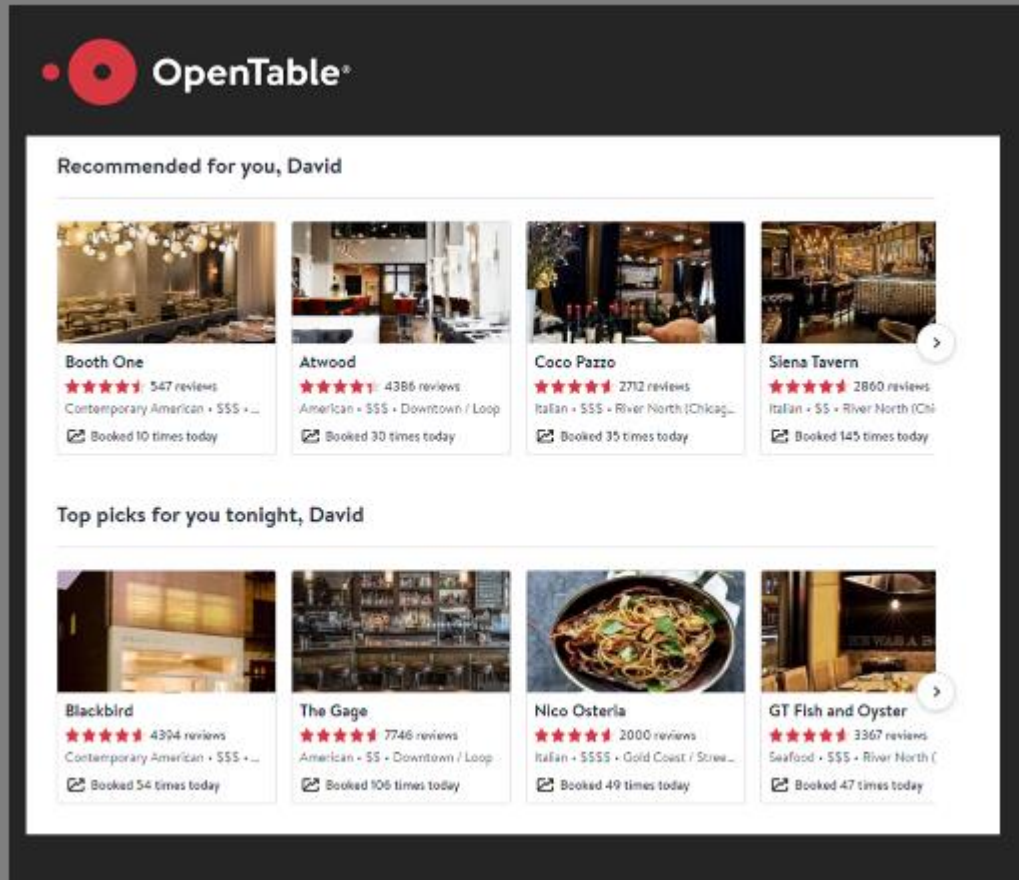


Glucose and blood sugar



Sugar, alcohol, nutrients


Artificial intelligence already influences our eating choices



Future Food?



What can we expect over the next 10 years?



Sensors and wearables will be everywhere

More **personalization** and **targeted meals**

Transparency is expected

Shifting Policy
Moving beyond dietary guidelines

The next generation are growing up with sensors/wearables



\$300 million

in funding for baby and children monitoring startups

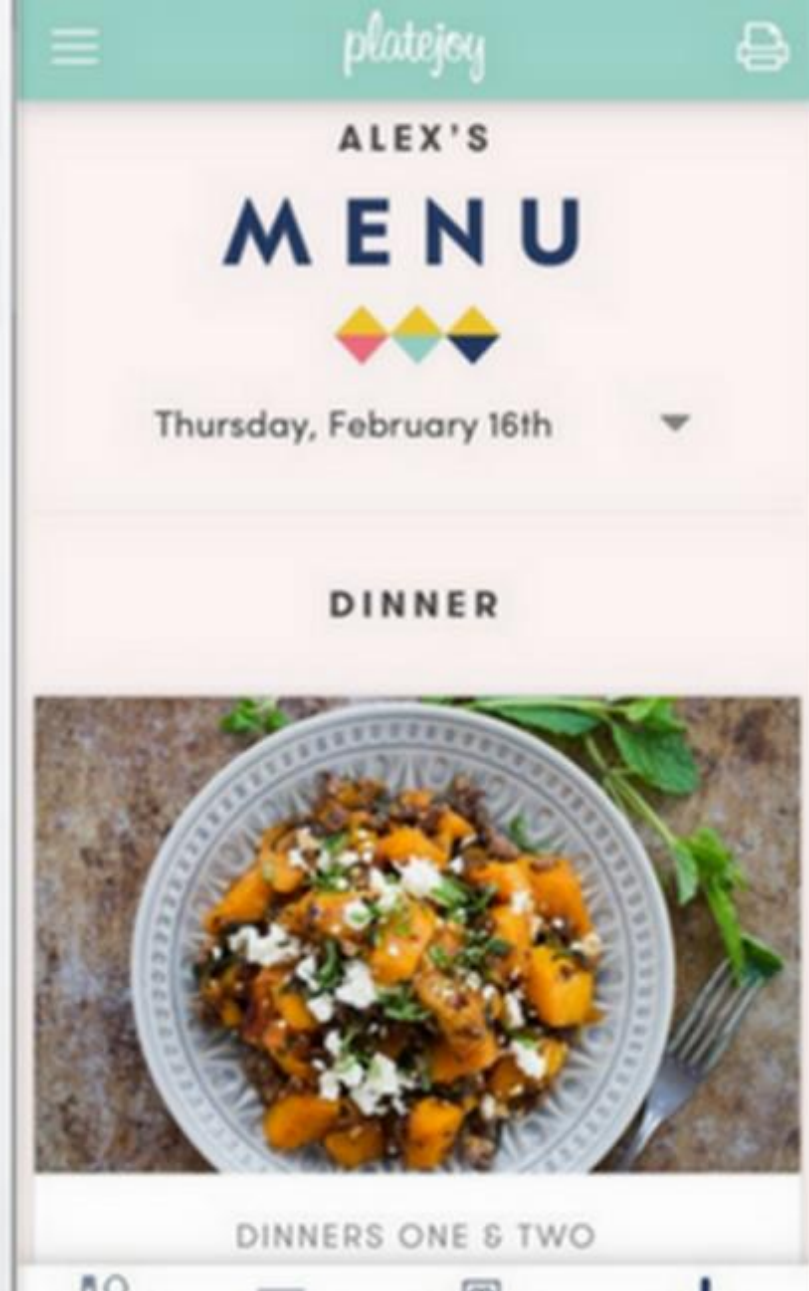
30%

are concerned with their friends judging what their kids eat

64%

of patients use a mobile device to monitor health

A new era of personalization and meal kits



Transparency: Authenticity vs. “Health Washing”



Policy makers are taking notice



**2020-2025 Dietary Guidelines for
Americans: We Want to Hear from You**





**How can you
capture the Health
and Wellness
opportunity?**



The new food consumer

- Concerned about wellbeing and health
- Explores by grazing and snacking
- Want healthy, . . . But also **indulgent**
- Trust their friends more than ads
- Mistrust of Government/Corp.
- Actively seeks information . . . With the aid of technology

What are the implications ?



DIY Health &
Wellness



Personalized
Diets

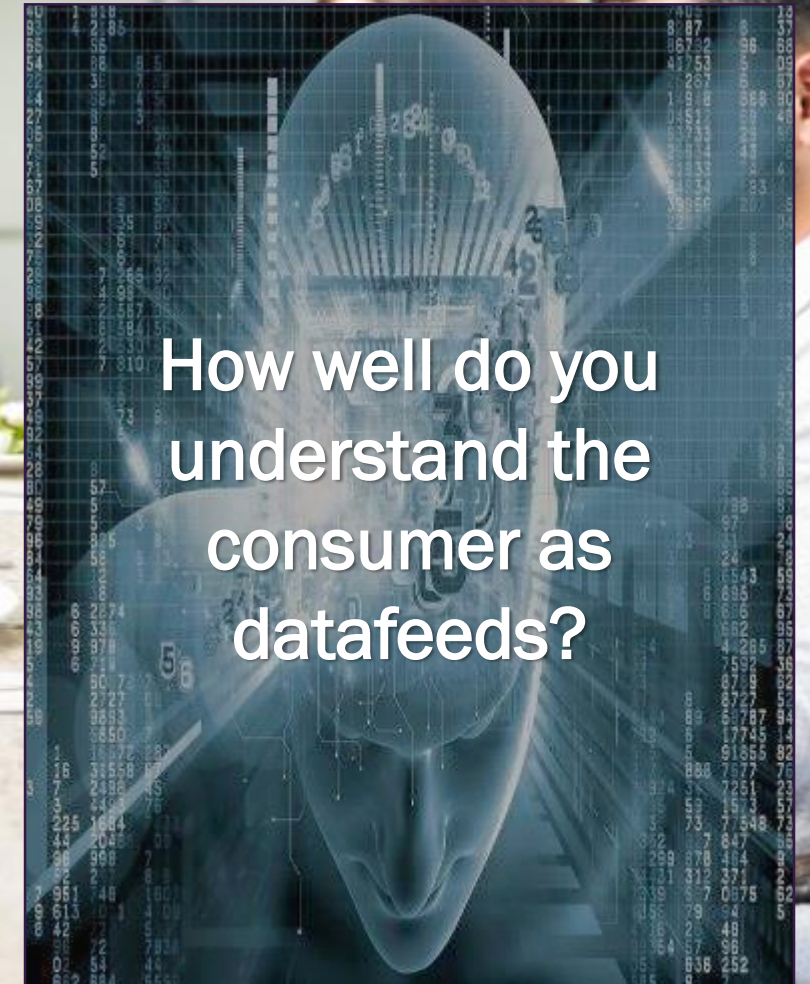


Regulatory
Pressure



New
Alliances

Some key questions for retailers and brands to consider



Data is currency

Deeper behavioral
understanding/ personalization



Predictive analytics/ Improved
product targeting



Higher switching costs/
Loyalty





How do industry experts remain relevant when,

- **DIY health becomes normalized**
- **Feedback technology and AI are ubiquitous**
- **Influencer models dominate communications**
- **Who is influencing the influencer?**

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